Bar Code Asset Management System

2026
USER MANUAL

For Program Version 3.5.0 or Greater

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INTRODUCTION TO BAR|SCAN®

INTRODUCTION

Thank you for purchasing Bar|Scan®. In use since 1988, we believe Bar|Scan to be one of the most comprehensive bar code enabled asset management system available for mid tier markets.

By using Bar|Scan, you will save your company many man-hours and thousands of dollars by just knowing what assets you have and where they are.

Bar|Scan largely automates the process of taking inventory thereby affecting a large reduction in manpower cost.

By knowing what assets are not currently in use, and where they are located, you can, many times, satisfy new requirements without having to purchase new assets.

When we talk about assets, we mean everything your company owns or leases, and all items furnished by your customers or your employees. This includes everything from individual personal computers to large machinery, and both capital assets and noncapital assets. You can even track consumables or supplies.

Bar|Scan will produce informative reports for all levels in your organization, from a list of assets for which an individual is responsible to a list for a department, to a list encompassing the entire company. You can produce lists of assets currently NOT being used so that the need to purchase may be avoided.

Bar|Scan is a complete Asset Management System. As with any management information system, before you implement the system, there are:

- ✓ procedures to be established,
- ✓ actions to be taken,
- ✓ information to be disseminated,
- ✓ responsibilities to be assigned,
- ✓ and decisions to be made.

The next chapter in this manual provides a guide to most of these considerations. We strongly urge you to read and address the material in *Chapter 2 - Suggested Procedures* before you start using Bar|Scan.

MANUAL ORGANIZATION

This manual is presented in the order in which you will want to use the Bar|Scan system. Starting with Chapter 4, you will find the instructions for using the different features of Bar|Scan.

The following is a list of the Chapters and a brief description of the contents of each.

Chapter 2 - Suggested Inventory Procedures is a guide to the different management considerations which should be addressed before the Bar|Scan system is implemented.

Chapter 3 - Installing Software tells you about the computer system requirements and how to install Bar|Scan on your computer(s).

Chapter 4 - System Overview shows you features of the Main Menu and provides a brief description of each.

Chapter 5 - Operating the System provides instructions about cursor movement, ways to input change and view data, and the attributes icons and Function keys used when operating Bar|Scan.

Chapter 6 - Asset Table provides instructions for entering and maintaining the asset information.

Chapter 7 - Catalog Table provides instructions for creating and maintaining your catalogs.

Chapter 8 - Organization Table provides instructions for creating and maintaining your organization structure codes and names.

Chapter 9 - Location Table explains how to create, enter, and maintain your locations.

Chapter 10 - Report Table explains how to create, change, save, print, and preview reports.

Chapter 11 - Bar|Scan Mobile provides the instructions for using our application on your mobile device, including configuring and synchronizing with the database.

Chapter 12 - Transaction Table tells you all about the information that came from your Handheld Computer, and what to do with it.

Chapter 13 - Housekeeping provides instructions for the Bar|Scan utility features.

Chapter 14 - Import and Export provides instructions for using this feature to record and export asset information to other systems such as an enterprise fixed asset depreciation system.

Chapter 15 - Work Order Table explains how to view, change, correct, or add Work Orders associated with assets currently existing in the Bar|Scan system.

Chapter 16 - User Defined Fields provides an explanation for the optional User Definable Field Module, and it's features.

Chapter 17 - Multiple Company provides instructions for using the Multiple Company version of Bar|Scan that you may have purchased.

Chapter 18 - Bar|Scan SmartClient takes you through the Bar|Scan web delivered client application that can be used to display and print your assets over the internet or an intranet.

Chapter 19 - Training with Demo takes you through the features of Bar|Scan using a demo database.

Appendices -

> ***Appendix A - In Case of Trouble*** provides instructions in case of computer hardware or software problems.
>
> ***Appendix B - Imaging*** provides an explanation for the optional imaging feature, explains placement of an imaging file.

SUGGESTED INVENTORY PROCEDURES

INTRODUCTION

This chapter presents suggested procedures that you may wish to take into consideration prior to beginning your first Bar|Scan® inventory.

If you are inventorying a branch facility, we suggest that you have an on-site room that can serve as your "control center" during the course of your inventory. Optionally, this would be an office or conference room with a telephone and/or internet access for Bar|Scan support, and a printer.

Many things should take place before the physical inventory process can begin.

1. A complete work plan has to be developed.

2. Pre-printed Asset labels (bar code labels) have to be approved, ordered and received. In very few cases do we ever recommend that you print your own labels.

3. Room Tags (*optional* bar code labels that are physically applied to your locations) have to be decided upon, approved, ordered if they are being used, and received.

4. If departmental or cost center information is being gathered during the physical inventory, you will need a list of all of the departments, divisions, and unit names in their organization. This information is used to build out the Organization table in the Bar|Scan system. An electronic copy such as Excel is more useful than a paper copy.

5. The Facilities Department should provide floor plans which clearly designate the room divisions and the departmental information for each area. This information will be used to build out the Location table in Bar|Scan. An electronic copy is more useful than a paper copy.

6. If you wish to assign or link assets to personnel then you can identifies the people which have possession and/or is responsible for each asset. You might not want to link all assets to personnel. For example, you may wish to only link laptop computers. An electronic list provided to you from your Personnel Department can be imported.

7. The Bar|Scan database should be prepared with the new Company information. Organizations, Personnel and Locations should be entered or imported into the Bar|Scan system if the information is available.

8. Next, inventory supplies need to be procured, using the Initial Supply Checklist near the end of this chapter.

9. If possible, an electronic copy of any assets descriptions can be imported to populate Bar|Scan's Catalog Table. However, the descriptions must be uniform and in sufficient detail to be useful. Many times, it is better not to import this information, but to start with a "clean slate". This may involve taking digital pictures to aid in the development of the these descriptions which we call the Catalogs.

9. Using a Mobile Device Configuration specifically tailored to your needs, Locations and possibly Organizations, Personnel and Catalogs need to be synchronized into the Mobile Device for the inventory staff to use during the physical inventory.

When these things are done, the inventory crew will do a walk through. Any additional questions will be discussed during a short walk through of the site, i.e., Are there any leased items that should not be Tagged?

If no Catalogs are imported, when the walk through is complete, the inventory crew(s) should gather their supplies and begin the Catalog process. During the Catalog process, the inventory crew members create descriptions for each unique type of asset on Data Collection Sheets generated by Bar|Scan.

Once or twice a day the inventory crew members should photocopy their Data Collection Sheets for the Project Manager. Catalog data will be entered into the Bar|Scan system from the photocopied Data Collection sheets. The data will be checked for inconsistencies. If digital images are involved, these are matched to the Catalogs and imported into Bar|Scan. Then, Catalog Reports with bar codes representing each Catalog can be printed or synchronized into the Mobile Device for use during the remainder of the inventory process.

The inventory crew should begin the physical inventory of the Assets.

Reports should be printed to audit the accuracy of the inventory work as it is completed. All corrections and additions will be made to the data in the Bar|Scan database.

Reports should be printed for management to review. Changes to the data should be made, if any are requested. Then, final reports of the inventory should be printed.

DEVELOP A WORK PLAN

For inventories involving more than a few thousand assets or inventory teams of more than a few people, we recommend developing a Work Plan.

The Work Plan begins by providing an estimated time line, detailing responsibilities of each party during each phase of the project.

We recommend that you develop a complete work plan detailing the roles and responsibilities of each party during each phase of your inventory project. For larger inventories that may last several weeks, project management (PM) software such a web based or desktop product may be helpful for this.

Once the project is approved, this work plan should be updated and provided to Management for approval. The work plan can then be used to track the progress of a job (actual vs. projected) for budget purposes and evaluating performance.

The following page is a Sample Work Plan for your review.

SAMPLE WORK PLAN

Activity	JUNE	JULY	AUGUST
Install Bar|Scan® software, and begin training June 18			
Complete training June 20			
Order Bar Code Labels July 01			
Project Meeting, finalize scope of work July 09			
Receive floor plans and Dept. information from Facilities Department July 13			
Receive Bar Code Labels (polyester or foil) July 20			
Set up Control Center July 21			
Catalog assets July 21 - 23			
Inventory assets, and audit collected data July 26 - June 13			
Provide reports for Management approval June 16			
Return reports with any comments June 20			
Make adjustments per Management's request, if any, and print final reports June 21 - 23			
Train end users at your facility or via internet June 23 - 24			
Deliver all hard copy reports, procedure manuals, and maintenance documentation June 26			
Bar|Scan will provide on-going telephone and email support to Customer June 26			

Projected Dates Actual Progress

ASSET IDENTIFICATION

The Bar|Scan system requires the use of a unique identification number (numbers and letters) to properly identify an asset. If you don't already have a system then you MUST, before starting to use Bar|Scan, establish a company-wide, uniform, asset numbering system.

If you are building a database of consumables or quantity inventory, then a unique identification number is not required and you can skip to the Room Tag section.

As with any numbering system, there are several considerations.

WHY DOES THIS HAVE TO BE CONSIDERED NOW?

To initially create the list of your assets, a bar-coded label will have to be affixed to each asset. You will have to obtain these labels with bar-coded numbers before you start to enter assets into the Bar|Scan system.

The asset numbering system must be adequate to identify all of your current AND future assets. The length of the asset number is checked by the Bar|Scan system each and every time a new asset is entered into the system.

Bar|Scan does allow variable length numbers to serve as asset numbers so in special cases you can use serial numbers or other identifiers such as UID labels as your asset number.

In any case, all that Bar|Scan really requires is that each label has a unique identifier.

APPROPRIATE ASSET ID

Bar|Scan provides space for up to 80 characters for the Asset Number which can be any combination of letters and numbers. Bar|Scan also provides space for an optional *Secondary Asset Number* (the default is 12 characters but can it be stretched with the User Defined Fields Module). Bar|Scan does not care about the make-up of the identifier as long as each is unique and the appropriate length.

Bar|Scan also does not care which numbering system you wish to put in which Asset Number entry, for example:

✓ You may put your new numbering system in the Asset Number entry and your old property tag number in the Secondary Asset Number entry (this is most often the case).

✓ You may put your old numbering system in the Asset Number entry and your new number in the Secondary Asset Number entry (you will have to make sure each number is unique).

✓ You may choose to only use your existing asset numbers as the Asset Number (each number must be unique and you will have to obtain bar-coded labels corresponding to your existing numbers).

✓ If your old property tag numbers are not barcoded, you may choose to replace all of them with your new numbers during the initial inventory using the Mobile Device's label replacement function.

✓ If all of your assets have serial numbers, you may choose to use your existing serial numbers as the Asset Number. This is not recommended if the serial numbers are difficult to reach during an inventory, especially if the equipment is racked with cabling obscuring a direct line of sight.

A word of caution if you decide to use a *Secondary Asset Number*, normally Bar|Scan does NOT check this item for duplicate numbers. While this may sound like heresy, you can use the secondary number for any kind of number (e.g., a manufacturer's part number) which may indeed contain duplicate numbers. If required, Bar|Scan can check any field for duplicates.

Note on Asset Number Length: If you decide on an asset number length of six (6), we recommend that it does not begin with two alpha characters. This would be the same format as the Bar|Scan Catalog Number and could cause confusion.

SMART NUMBERING SYSTEM

A *smart* numbering system assigns a meaning to one or more characters in the number.

Bar|Scan neither assigns nor derives any special meaning from a *smart* numbering system. When Bar|Scan displays a list of asset numbers, the numbers will be shown in the standard alphanumeric sequence. Bearing this in mind, you may design a *smart* numbering system in any manner.

Your existing numbering system may contain significant characters to indicate whether the asset is owned, leased, customer furnished, or personal property. Sometimes characters are used to indicate if the asset is capitalized.

The decision to design a new, or use an existing *smart* numbering system or not, is strictly a matter of your choice. Keep in mind however, Bar|Scan can record and can subsequently generate reports covering almost anything a *smart* numbering system would provide. For this reason, we generally recommend that you forego a *smart* numbering system.

If you must use a *smart* numbering system, it will have to be designed before bar-coded labels are obtained. You will also have to formulate a specific procedure defining what labels are affixed to what assets (a time-consuming and costly process when you consider the additional effort required during the tagging operation). You might alternately consider color coded labels instead of a *smart* numbering system.

ASSET NUMBERING SCHEMES

If you don't already have asset labels, the simplest asset numbering scheme is to begin your asset numbering sequence with one. If you have an eight-digit number, your first asset will be "00000001".

Consider the following options only If you have special issues:

If you have more than one bar coding system in your company. You may wish to begin your asset numbering scheme with a leading alpha or numeric such as "FA" for fixed asset. Remember Bar|Scan does not use this information.

Alternatively, if you have subsidiary or sister companies that may adopt a fixed asset system, you may wish to distinguish between then by leading your number with one or two characters. For example, *Bar|Scan, Inc.* tags may be "BS0001," "BS0002," "BS0003," etc. or "BC0001," "BC0002," "BC0003," etc. for *Bar|Scan, Inc. Corporate*.

Another option used is to precede the number with the year of acquisition. Label all of your assets purchased in 1998 as "980001," "980002," "980003," etc. Label all assets purchased in 1999 as "990001," "990002," "990003," etc.

The Bar|Scan software orders asset numbers based on a character method so whatever method you choose; it is acceptable to have leading zeros or even asset numbers of different lengths.

Don't worry about not having enough digits in your number. Because bar codes are alpha-numeric, you can have about 500,000 combinations with just a 4 character number.

If you use Room Tags, the length of the Asset Number should differ from the length of the Room Tag Number. The Mobile Device can then verify that you scan a Room Tag and not an Asset Tag and vice-versa.

WHAT IF I ALREADY HAVE ASSET NUMBERS OF VARYING LENGTH?

If you already have an asset numbering scheme and the asset labels do not all contain numbers of a fixed length, you can instruct Bar|Scan to accept a variable

length asset number on the desktop or in the Mobile Device. Bar|Scan can operate with a variable or fixed length asset number. If you want all of your asset numbers to be a fixed length, you will have to instruct Bar|Scan to pad the numbers with leading zeros. The amount of padding depends on the length of your largest number. For example, if the largest asset tag number is “550555", then all asset tags will be padded to a maximum length of 6 digits.

WHAT ABOUT ROOM TAGS?

A Room Tag is a bar-coded label that identifies a specific location. Once a set of location codes has been entered into the Mobile Device, a bar-coded label can be scanned and affixed somewhere in the room, e.g., a door jamb or server rack or supplies shelf. The label will now identify that specific combination of location codes.

Bar|Scan provides space for up to ten characters for the Room Tag. The composition of the code has NO effect on Bar|Scan. The length of the code you determine should be consistent, i.e., if you establish a 5-character code it should remain a 5-character code throughout the life of the system. However, Bar|Scan can also use a variable length Room Tag, if necessary but much of the *Validation* capability of Bar|Scan is lost.

You may use Room Tags for some rooms and not for other rooms. Bar|Scan does not require that a Room Tag is associated with every location.

Bar coded Room Tags contribute to the speed and accuracy of the inventory process. It eliminates the necessity for entering the different location codes.

Room Tags are an optional part of Bar|Scan, i.e., if you wish, you may instead record the specific locations using the different location codes and not use a Room Tag. The Room Tagging operation should be accomplished before initial asset tagging, but can occur during initial asset tagging if desired.

ARE ROOM TAGS RIGHT FOR ME?

The Room Tag feature allows you to attach Region, Building, Floor, and Room (or Pallet or Vault location identifiers) to a bar code label (Room Tag Number) the first time you conduct an inventory of that area. The next time you inventory

that Room, you simply scan the Room Tag. Bar|Scan will attach the appropriate location information to the asset when the data is synchronized from the Mobile Device into the Transaction Table. Room tags are desirable for private offices and on projects where Room is narrowly defined. If the Room is a large cluster of workstations, finding the Room Tag during the inventory may be more work than it would be to find the Room name on a floor plan. You may use Room Tags for some Rooms and not for others.

Room Tags are an excellent choice for warehouse locators and are highly recommended in this environment.

We recommend a Room Tag sequence that abbreviates the warehouse location schema, for example:

BLDG: WHSE1
ROW: 05
BAY: 12
LEVEL: 3

Would use a Room Tag Schema: 1-05-12-3 (including hyphens). So the Room Tag label would be '1-05-12-3'.

We recommend that all Room Tags be of the same length so that the Mobile Device can do length checking. The Room Tag has a maximum length of 10 characters.

Customers can print Room Tags using their regular printer and slipcover or laminate them and then adhere them to the bin or vertical post of a pallet. For example, if the pallet is 3 high, they would print 3 Room Tags per page and apply to the left post.

For bins, a desktop Zebra Brand printer can be used with Bar|Scan. Labels can also be created using label making software.

In all cases the density of the label must be compatible with the Mobile Device. For example, long range labels require specific hardware which typically cannot scan asset labels.

Finally, while Room Tags are optional, they are the preferred method in a Warehouse environment.

If Room Tags are desired, we recommend that the Room Tag have a different number of digits than the Asset label. The Mobile Device will check for the number of digits to prevent inventory personnel from scanning Room Tags as Asset labels and vice versa.

DUAL SEQUENCE LABELS

Dual Sequence Labels are bar code labels that are printed with two of each number on a sheet or roll. Server racks or Systems Furniture panels are good candidates for Dual Sequence labels.

Computer Equipment in racks can be tagged twice with the same number, one tag in front and one on the back. This makes it easy for a technician to scan if they are working on the front or the back, e.g. changing cables in a patch panel.

Systems furniture panels can be tagged twice with the same number, one tag for the side rail and one under the top cap for scanning when in storage. These duplicate labels are not as wide as the typical label and usually do not have the company name on them -- just the human readable number.

You may want to consider ordering asset labels that have a duplicate label on them. System furniture panels can be tagged twice with the same number, one tag for the side rail and one under the top cap for scanning when in storage. The second label can be ordered so that they are not as wide as the typical label, and usually do not have the Customers name on them – just the human readable number, making it easier to apply to thinner edges on panels. This second human readable number may also be placed on the P.O. for new assets that have yet to arrive. In this manner, the asset information can be entered while the paperwork is at hand. The human readable number will serve as a reminder to Tag the asset with that bar coded number.

There is a variation of Dual Sequence labels called Split labels. Finally, you can also order triple sequence labels.

DESTRUCTIBLE BAR CODE LABELS

There are three types of labels we generally recommend for fixed assets -- polyester, polypropylene and destructible vinyl. Polyester is the most widely used. Destructible vinyl and similar materials cannot be removed without destroying the label -- this is a little more expensive but will prevent individuals from switching tags. You can have your logo or a stylized name printed on the top of each label. Both polyester and vinyl can be color-matched to your system furniture if desired. Generally, there is no reason to color match or otherwise enhance labels for IT equipment.

The three types of labels can be color-matched to your system furniture. Light to Light-Medium colors are usually printed with a black bar code and clear laminate over the top. These types of labels can be read with a standard scanner or imager.

Medium to dark colors may require a different process and will not match as closely. With Medium to dark colors, a white label with black bar code is laminated with a carbon-free color laminate. An infrared scanner should read through the laminate. Whenever these types of labels are used, a test sample should be created before the order is finalized to insure that the labels can be read.

All asset or room tags should have the same number of digits. Leading zeros are used for smaller numbers in the series. Care should be taken that the sample label provided matches the number of digits you've requested.

ALUMINUM FOIL BAR CODE LABELS

We typically recommend polyester, polypropylene or destructible vinyl labels for most applications.

Anodized aluminum labels are for harsh environments -- outdoors and industrial. In most indoor asset management applications, aluminum labels offer no advantages over the other materials.

Occasionally, we may recommend Teflon labels. These types of labels are resistant to chemical abrasion and may be desirable in a hospital, laboratory, or other location where chemical solvents are used.

COLORED BAR CODE LABELS

Generally, there is no reason to color match or otherwise enhance labels for IT equipment.

Bar code labels can be purchased in various colors. While there are advantages to white labels such as cost and visibility, it may not be the best choice for aesthetic reasons. For example, if you recently purchased a large amount of Furniture in a tan tone, you can match the tone on the label. This is usually done by selecting a color from a PMS color guide (Pantone® Matching System Color Chart) or submitting a paint sample to us. We can then print the background in this color. Of course, for contrast, the bar codes usually will need to remain black. Specialty labels mimicking wood tones or displaying clear underlay may also available.

In any case be careful to maintain contrast between the bar code and the underlying color. If there is a doubt as to the readability of the label, submit a sample for testing to us.

Light to Light-Medium colors are usually printed with a black bar code and clear laminate over the top. These types of labels can be read with our standard Mobile Device.

Clear labels are also available. These labels are polyester. They are clear on the edges, with a black bar code. Behind the bar code, the background color is white; it has to be white in order for the scanners to read the bar code.

Medium to dark colors may require a different process and will not match as closely. With Medium to dark colors, a white label with black bar code is laminated with a carbon-free color laminate. An infrared wand or scanner should read through the laminate. Whenever these types of labels are used, a test sample should be created before the order is finalized to insure that the labels can be read.

Today, Mobile Device come with different types of scanning technology such as 2-D Imagers or 1-D lasers and specialized labels my not be readable by all Mobile Device models.

ORDER BAR CODE LABELS

The next step is for Management to decide on a type of bar code label for Assets and Room Tags (Room Tags are optional). Bar|Scan, Inc. or your Bar|Scan Dealer will work with you to develop specifications to meet your needs. Samples can be provided to assist you in your decision process. The tags generally take two to four weeks to be printed -- color-matching to systems furniture is available. Polyester, aluminum foil, plastic, and Teflon® coated labels are just some of the materials available to you to provide a bar code label solution, regardless of environment.

If Room Tags are desired, we recommend that the room tag have a different number of digits than the Asset label. The Mobile Device can then check for the number of digits to prevent inventory personnel from scanning Room Tags as Asset labels and vice versa. The labels can begin with letters if that is desirable, i.e., the Room Tags can begin with an "L" for location or an “R” for room.

Here are some label samples that incorporate the varies topics discussed

Sample Asset Tags

Sample Room Tag

ORGANIZATIONAL RESPONSIBILITY OF ASSETS

Bar|Scan provides space for three items of information to identify what Division, Department, and Unit (or cost center) has possession or is responsible for an asset.

These items are optional features of Bar|Scan; that is to say Bar|Scan does not depend on the entry of these items to support other features. However, careful consideration and entry of these items will enable Bar|Scan to produce important reports for the different organizations or cost centers within your company.

As an example, a particular department may be physically located on two floors of three different buildings, and some of these locations may be sections within the department. Most department heads would appreciate being able to obtain different reports about where assets are located, what assets are being used by which sections within the department, etc.

Bar|Scan provides fields for three organizational levels. Each field can contain up to 12 characters. We have named these levels: division, department, and unit. You can rename the or add additional organizational information by using the User Defined Fields Module. These fields can be stretched Using the UDF Module.

ORGANIZATION CODES

Once you have identified the different organizational levels and their names, you will want to establish a set of codes to represent the different entries. By using an Organization Code, the inventory personnel may establish the Division, Department, and/or the Unit responsible for an asset by simply scanning one code. These Organization Codes are used when entering new asset information into the system (either from the computer keyboard or the Mobile Device).

Organization Codes are up to six characters of your choice and can be the or cost center. You can stretch the organizational code length by using the User Defined Fields Module. You can then tell Bar|Scan what the code characters represent and assign the names to the codes. Bar|Scan can display the actual name of the division, department, and unit on reports, with or without the Organization Code, or the Organization Code can be printed alone to save space.

SAMPLE ORGANIZATION STRUCTURES

DEMOCO
BAR CODE ASSET MANAGEMENT SYSTEM
{SYSTEM} ORGANIZATION REPORT - BY DIV, DEPT, UNIT

FILTER: ALL ORG CODES **REPORT ORDER: DIVISION, DEPT, UNIT**

Division	Department	Unit	Organization Code
ADMIN	HUMAN RES	EMP. BENFTS	01A 2
ADMIN	HUMAN RES	PERSONNEL	01A 1
ADMIN	INF. SVCS	APP. SUPRT	01B 1
ADMIN	INF. SVCS	COMPUTER OPS	01B 2
ADMIN	INF. SVCS	DATA CONTRL	01B 3
ADMIN	INF. SVCS	TELECOMM	01B 4
ADMIN	OFFICE AUTOMN	MAIL	01C 1
ADMIN	OFFICE AUTOMN	PRINT SHOP	01C 2
ADMIN	OFFICE AUTOMN	RECORDS MGMT	01C 3
FINANCE	ACCOUNTING	ACCT PAY'BLE	02A 1
FINANCE	ACCOUNTING	ACCT REC'BLE	02A 2
OPERATIONS	QUAL. CONTRL	INSPECTION	03B 1
OPERATIONS	QUAL. CONTRL	PROD. CONTRL	03B 2
OPERATIONS	SHIP/RECVG	LONG TERM ST	03A 2
OPERATIONS	SHIP/RECVG	STAGING	03A 3
OPERATIONS	SHIP/RECVG	STORING	03A 1
SALES	BUS DEVEL	REMOTE OFFIC	03E
SUPPLY	PURCHASING	ORDER PROCES	09Z 9

PERSONNEL RESPONSIBILITY OF ASSETS

Bar|Scan provides space for employee information to identify what person has possession or is responsible for an asset.

The Personnel Table is an optional features of Bar|Scan; that is to say Bar|Scan does not depend on the entry of personnel to support other features. However, careful consideration and entry of these items will enable Bar|Scan to produce important reports for the different groups of employees within your company.

Most department heads would appreciate being able to obtain different reports about which assets are assigned to or being used by various employees, etc.

Bar|Scan provides fields for information relevant to employees such as phone, email, department, etc. You can rename the fields or add additional fields by using the User Defined Fields Module. These fields can be stretched using the UDF Module.

FLOOR PLANS FOR LOCATIONS

Even though you might have an electronic copy, you should acquire printed floor plans for the areas to be inventoried, which indicate the Building, Floor, and Room as well as the organization (departmental information) to be used throughout the project.

You can use the floor plans provided to enter or assist with the import of Location information into the Location table in the Bar|Scan system.

Floor plans are also very useful for your inventory personnel as a means of "checking off" areas that they have completed during the Catalog process, the Tagging process, as well as during the audit process.

TYPES OF LOCATIONS

One of the more important features of Bar|Scan is its ability to record and maintain the physical location of each asset. Before asset locations can be recorded, location codes must be established to identify the various locations in your facility.

In order to establish location codes, you should have a *complete* set of the most up-to-date floor plan drawings (paper or electronic) for your facilities in order to document location assignments.

Bar|Scan provides three different types of Locations.

1. Site Locations - most common type of location - used for buildings
2. Pallet Locations - used in most warehouses
3. Vault Locations - used for all vaulted storage items

The Site Location in Bar|Scan provides up to four *levels of location.* We have named them Region, Building, Floor, and Room. You will want to develop a location scheme which will cover all relevant locations within your company. As with most fields in Bar|Scan you can rename these fields, although we generally advise against it.

The Pallet Location in Bar|Scan provides five *levels of location*. We have named them Building, Row, Bay, Slot, and Level.

The Vault Location in Bar|Scan provides five *levels of location*. We have named them Building, Vault, Row, Bay, and Level.

All of the three available types of locations have fields for: a Room Tag, a Location Description, a Reference Organization, and the Square Footage of the space.

Important: You do not need to use all levels of location. If you determine that you would like to track your assets only to the floor they reside on, but not to an individual room, you may do so. This is done by only completing the levels you wish to track and leaving the others blank.

Unless you are warehousing your assets, you will use the standard location called "Site", Bar|Scan provides space for four different site codes as follows:

✓ Region - normally up to two characters
✓ Building - normally up to five characters
✓ Floor - normally up to five characters
✓ Room - normally up to six characters

Each of the above codes can be letters, numbers, or a combination of both. The four different codes represent four different code **levels**, i.e., the Room is located on the Floor which is located in the Building, which is located in the Region.

It is recognized that your company may currently have a location coding system in place. If so, it can be easily adapted to Bar|Scan.

The titles given to these location items are based on the most common usage in the industry. They can, however, be modified to suit your particular preference.

You may establish one, two, three, or four different code levels to identify a specific physical location (usually one or two codes is insufficient for this purpose). You may use any of the four different items, just remember that Bar|Scan will assume that they are different *levels*.

If you do not have an existing location coding system, we recommend you establish a coding system containing *four* levels. If you intend to use less than four levels, we strongly urge you to identify the Building, Floor, and Room.

It is desirable to establish codes consisting of characters that are meaningful, particularly the Building and Room codes. For example, unless it is customary to refer to different buildings by a number, choose code letters that are somewhat descriptive of the building, such as "ADMIN" for the administration building or “603" as 603 Main Street. The reports produced by Bar|Scan will be more easily understood by personnel outside of your group.

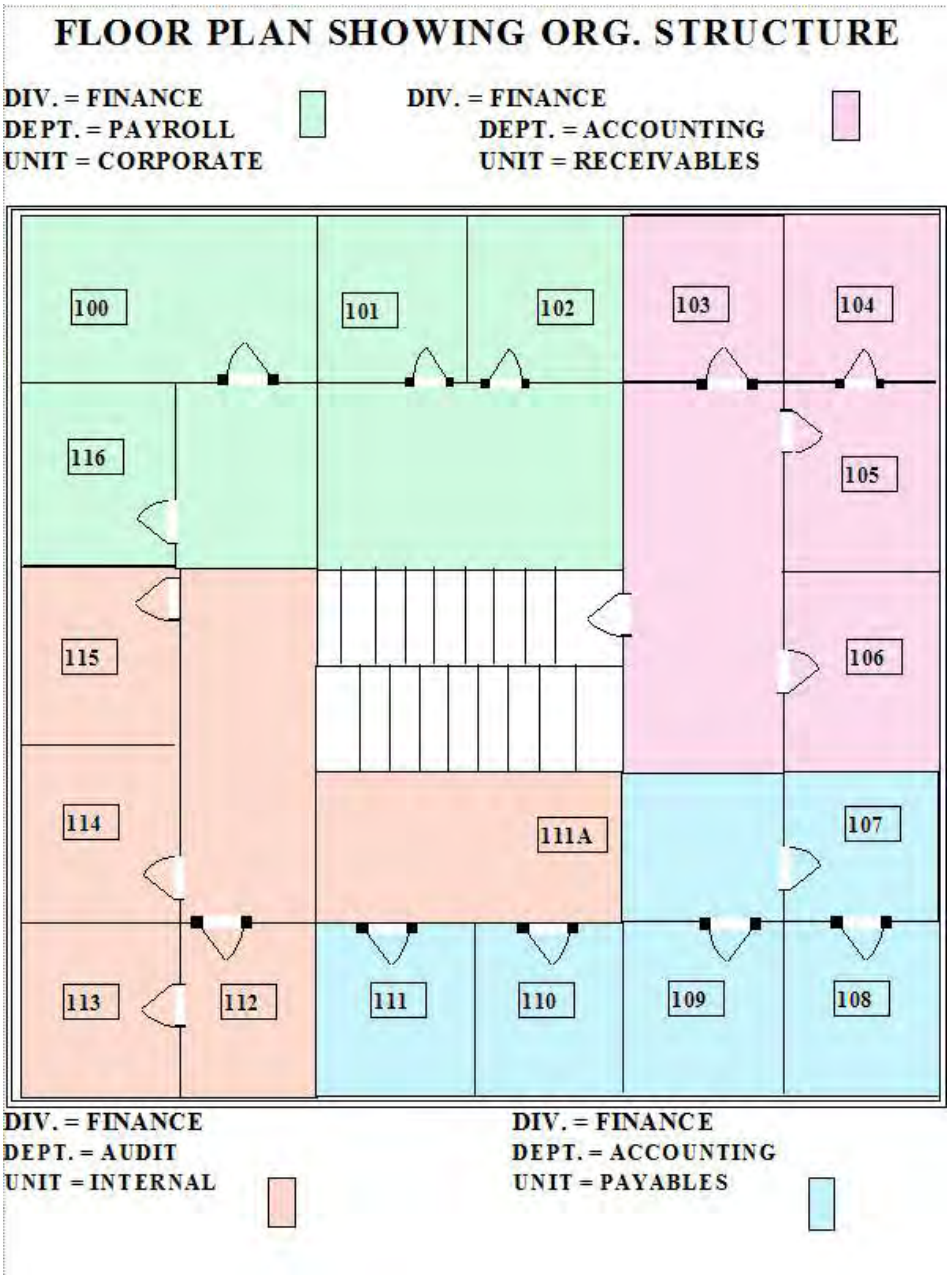
When you have decided upon the location names or codes to be used, record the codes on your set of facility floor plan drawings so the codes can be incorporated the next time the drawings are revised.

Then, Location and Organization bar code menu lists are printed for inventory personnel to use during the inventory *or* the information is synchronized into the Mobile Device *or* both.

Location & Organization Bar Code Menu Lists are not required. However, if you choose not to use them, we recommend that you do synchronized the location, personnel and organization data from your desktop down into the Mobile Device. It has been our experience that when this information is hand entered into the Mobile Device by hand, rather than being scanned or chosen from a pop-up in the Mobile Device, there are significantly more inconsistencies and errors.

Important! If you are planning to use Room Tags, you may only use one Room Tag number for each Room. All assets in a given area must be listed in the same Room with the same Room Tag number. Also, each Room Tag must be linked to a unique location. Note that this is different than using two Room Tags each with the same number on two different entrances to the same room.

Here is a sample floor plan incorporating both location and organizational information.



STANDARDIZE TAG PLACEMENT

You will want to establish guidelines for the physical locations of the asset labels. There are four aspects which should be considered:

- ✓ Consistency
- ✓ Accessibility
- ✓ Aesthetics
- ✓ Vulnerability to Damage or Wear

Determine consistent label locations for the different kinds of assets. This location must be accessible to the Mobile Device's camera or bar code scanner. RFID technology is the exception.

In addition to accessibility and consistency, the aesthetics of the assets must also be considered when determining label locations.

Also consider placement locations which will not be prone to damage or wear.

It is usually desirable to establish written instructions and illustrations of recommended label locations in order to train inventory personnel. Placing a label on an asset and taking a digital photograph is a quick and easy way of documenting your guidelines.

Typically, we recommend placing asset tags on personal computer and office equipment on the top left side. Racked equipment usually requires placement on the front panel. Files and pedestals that can be placed side by side should have tags placed on the front. Tags can be placed inside drawers only when a single master key is available, otherwise it is not practical for locked items. Tags for other furniture items can typically be placed within easy reach, out of sight.

Here are some possible guidelines:

We have more Tag Placement Guidelines in a separate document on your Bar|Scan installation CD.

CREATING CATALOGS

The Bar|Scan Catalog identifies and defines the different types of assets. Each asset will require a catalog number.

The Bar|Scan Catalog identification number consists of a two-character Category number plus four digits to specifically define a particular kind of asset. Bar|Scan provides a list of Categories and their associated two-character codes. You may add additional categories if you wish. The four-digit number is assigned by you.

Although not recommended, the two-character alpha and four-digit convention can be changed. If your discovery tool or enterprise asset management system requires a different convention, you can modify both the formatting and the length of the catalog number with the UDF module.

In addition to type, description, dimensions, manufacturer, manufacturer's part number, and manufacturer's tag number, Bar|Scan provides attribute fields that can be used to further define a specific asset.

Depending on the Category selected, from one to seven "Attributes" may be identified for each Catalog number. If you need more than seven, you can create them by using User Definable Fields.

You must determine the *depth* of definition you want each Catalog number to represent. For example, you could use a single Catalog number to be assigned to ALL desks (with no further definition and no Attributes), or you could assign a different Catalog number and Attributes for every different kind of desk.

Note that the less specific the Attributes are, the smaller the number of different Catalog numbers that need to be assigned. However, fewer Catalog numbers mean that the information about the assets in your system will be less definitive. Consequently, considerable care should be exercised when defining the Attributes required for each Category in the Catalog.

Another consideration is the four-digit number itself, for a particular Category. You can assign meaning to one or more of the digits, e.g., numbers starting with 1000 means desks, 2000 means credenzas, etc. But, because you can sort your Catalogs by any field that is contained as part of the Catalog, we do not

recommend taking the time to use this method. Most often you will be assigning the numbers sequentially.

Refer to the Catalog Development Guidelines at the end of the Catalog chapter for more information on properly defining your Catalogs.

CATALOG DEVELOPMENT

If you are not importing your initial Catalog information, to begin Catalog development, data Collection Sheets for each Catalog Category (that are being used) should be printed. Data Collection Sheets are included in the Bar|Scan Compact Disk (CD) in Word, or PDF formats.

If you are not importing your initial Catalog information, there are two traditional ways to manually collect the information you require to populate your Bar|Scan Catalog Table.

For IT Assets - Skip the initial Catalog process and collect only the descriptions (manufacturer, type and model) as you do the physical inventory with the Mobile Device. You can either use the Data Collection Sheets or configure the Mobile Device for a description field which will later be used to create the Catalogs. As the inventory progresses, these descriptions are converted into Catalogs and downloaded into the Mobile Device with every synchronization. Within a few days, most of your IT assets will be available as Catalog pop-ups.

For Furniture Assets - During the Catalog process, the inventory personnel go into the field and assign sequential numbers, by Category, to descriptions of each unique item they encounter. (For example, SE = Seating, therefore the Catalog Number for the first chair encountered will be SE0001, the next unique chair will be SE0002, etc.) The Project Manager may suggest a pattern for covering an area or the best route for that day.

Note: Catalogs are only created for each unique type of asset. Therefore, if you encounter two or more identical chairs, they would use the same Catalog. It is only when one or more features of that chair is different, i.e., blue vs. green, that a new Catalog is created.

The Project Manager may wish to divide the Catalog creation by Categories --

Seating and Case Goods to one team, Systems Furniture and Tables to another, Office and Personal Computer Equipment to another. If multiple teams are going to create Catalogs for the same Catalog Category, each team will need a separate number series assigned to them, i.e., team one will use SE0001 through SE0099, and team two will use SE0100 through SE0199.

Team leaders will determine the most efficient division of duties on their team. One team member may be measuring the asset and calling off the attributes while the other team member is writing the Catalog information on the Data Collection Sheets.

Optionally, each unique asset can be photographed using a digital camera, with its assigned Catalog Number written on a marker board next to the item -- for later identification. Once the Catalog information has been entered into the Bar|Scan system, the pictures for each item can be linked to it's Catalog in the Bar|Scan system. This will allow you to see the description information of the Catalog, click on the appropriate icon and see a digital image of that item.

Note: When taking digital pictures, remember that the direction of lighting, both ambient and camera flash, may cause a glare off of the marker boards and black metal items such as file cabinets. We recommend two photos of each item are taken, at different angles. Bar|Scan can accommodate multiple images per Catalog or asset.

Near the end of the shift, each Team Leader should replenish their daily supplies. If additional supplies are going to be needed the Project Manager should be told before the stock is gone.

Team Leaders should lock away all equipment including digital cameras, and walkie talkies.

Each day the Team Leader should give the Project Manager photocopies of the Data Collection Sheets and their daily notes showing the Date, Building, Initials of the Team members, and the number of Catalogs created that day.

Each Team Leader should note areas covered that day on the Project Manager's Master Floor Plan using a colored highlighting pen.

If you are using a digital camera, the Project Manager will upload and clear the camera on a daily basis.

The Project Manager will enter the new Catalogs into Bar|Scan using the photocopies of the Data Collection Sheets provided by Team Leaders. Data Collection Sheets which have been entered into Bar|Scan should be kept on hand in case questions arise. The Project Manager should identify inconsistencies in data entry. Inconsistencies, missing information, questions, and noted duplicates should be communicated to Team leaders at the earliest opportunity.

As each Category is completed, or more often depending on the number of Catalogs, the Project Manager will print a Catalog Bar Code Menu Lists (a report of all the Catalogs with the Catalog number in bar code format). This report will be used by the inventory teams during the Tagging process.

INITIAL TAGGING PROCESS

The Inventory Tagging process is the initial entry of information for each asset in your company into the Bar|Scan system. Bar|Scan provides you a great deal of flexibility in accomplishing this task.

Before starting the process, however, you will want to plan the operation to establish the most efficient and appropriate methods for your organization.

In this section, we have attempted to identify the different considerations you must decide upon before starting the actual Tagging process.

WHAT INFORMATION WILL BE INITIALLY RECORDED?

A primary consideration is the determination of the different items you wish to initially enter into the system.

You will also want to decide if you are going to collect additional information such as a Serial Number.

We recommend you produce a document defining what items of asset information will be recorded, when they will be recorded (initially or later), and how they will be recorded (using the desktop or the Bar|Scan Mobile application in your device). If any preprinted sheets containing bar-coded definitions are to be used, instructions for their use should be included.

Overall, you will want to record bar-coded information and information that can only be derived in the physical presence of the asset with the device. Some of these items are: the Asset Number, the Catalog Number, the Serial Number, the location information, for IT assets: the components that are attached to the asset which cannot be identified with a discovery tool, for furniture assets: the condition of the asset, etc.

You will want to enter most of the initial asset information using the device. Subsequently you might perform an import and reconciliation of existing data, however, your initial physical inventory is almost always the baseline for comparison.

Some items, such as Catalog information (from the Data Collection Sheets), are normally entered at the desktop. You may also determine that you will want to enter other items at the desktop. Why is this? By entering at the desktop, the information is being filtered through the Project Manager who can make comparative decisions and adjustments to the raw data prior to data entry. A human brain can spot these data items and is still the best way to perform this initial process.

Note that the Bar|Scan Mobile app in the device user records entries either by scanning a bar code, using a downloaded pop-up list of choices, or by typing the information on its screen or keyboard; it makes no difference to thedevice. Optionally, you can generate preprinted sheets that contain lists of, for example, location codes and their associated bar codes. The location codes could then be scanned from the preprinted sheets rather than a downloaded pop-up list of choices or entering the codes on the keyboard.

Choosing from a downloaded pop-up list of choices, whenever possible, the method of choice. The most obvious reason is the level of accuracy. However, equally important is the speed of choosing from a pop-up list and therefore scanning a preprinted sheet with bar codes might be faster under certain circumstances.

The Bar|Scan system on your desktop provides the ability to *globally* add or replace information. Therefore, it is sometimes faster to change information at your Desktop, rather than re-inventory whole areas. For example, you have moved all of the assets in a particular location to storage and you wish to update the Status for all of these assets. This is simply accomplished at the desktop by selecting the group of assets in the location and changing the Status information on all of the entries at once.

WHAT IS REQUIRED FOR THE TAGGING PROCESS?

You will need to have a thorough understanding of the use of the Bar|Scan Mobile app in our device. You will need the following materials to complete the Tagging process:

- ✓ An accurate floor plan of the area for verification
- ✓ The Mobile Device
- ✓ The Catalog downloaded into the Mobile Device or as a Bar Code Menu
- ✓ The Location downloaded into the Mobile Device or as a Bar Code Menu
- ✓ Optional: The Organization and Personnel downloaded into the Mobile Device or as a Bar Code Menu
- ✓ Bar coded labels (unless you are using serial number for the primary id)
- ✓ Optional: a digital camera to record new Catalog or asset entries
- ✓ Optional: a Bar|Scan marker board to identify the Catalog number of the asset as it is photographed
- ✓ General guidelines showing the preferred placement of the bar coded labels on the assets
- ✓ Instructions defining what information to record for each asset and what to do in case of exceptions, e.g. missing serial number

WHO SHOULD DO THE ACTUAL TAGGING?

Generally, one person or a team of two people is sent to a particular area in your facility with a Mobile Device to affix a bar-coded tag to each asset and to record information about the asset.

It is most efficient to assign different tagging personnel to different groups of assets. The training is easier and the individuals can quickly become proficient

with their items.

This approach has however, a potential drawback. The disruption to personnel in the different areas will be higher, e.g., one team tags desks and chairs, another tags computer equipment, etc.

WHEN IS TAGGING ACCOMPLISHED?

Initial tagging can be accomplished most easily when areas are clear of working personnel (e.g., nights and weekends). But, you must make provisions for master keys, sensitive equipment and areas that may not be accessible during off hours (such as server rooms).

Aside from some obvious drawbacks, some of the information about Current Ownership may be harder to obtain when there are no personnel available. Recording the name of the person using the assets can be very important when trying to locate a specific asset, especially when the Room is large.

It is always desirable to inform people in the affected areas in advance of the tagging operation. This is especially true when you must tag assets during normal working hours; you will want the cooperation of the individuals whose work schedule you will be disrupting. Notification by email alone might not be sufficient.

TAGGING PROCEDURES

The Project Manager creates the Mobile Device Configuration in Bar|Scan which when synchronized into the Mobile Device provides the prompts for all of the information that is to be collected during the inventory.

Team members should gather their daily supplies for Tagging.

Team Leaders should check the date, time and time zone in the Mobile Device, and correct the information if necessary.

IMPORTANT! You must synchronize the Mobile Device at least once even before you begin the inventory. This is to download the pop-ups and properly configure the list of prompts.

The Project Manager may also divide the Teams by Categories; Servers and Telecom Equipment to one team, Office and Personal Computer Equipment to another, Systems Furniture and Tables to another, etc.

If new Catalog Bar Code Menu Lists are ready, the Project Manager will distribute them to the inventory teams.

Next, the Project Manager should communicate to the teams where to start their inventory process. Team leaders will determine the most efficient division of duties on their team. One team member may call out the information by looking at the asset, while the other looks selects the Catalog number and enters the information into the Mobile Device.

If an Asset is incorrectly scanned and the information saved, it should be re-scanned. The Project Manager will review all duplicates to determine if a duplicated scan can be deleted.

INVENTORY AN ASSET THAT HAS NOT BEEN CATALOGED

Additional furniture and new equipment catalogs may be required during the tagging process. This will not halt the tagging process. Your personnel will simply assign the next available catalog number in the particular category; photograph the item, if it's furniture; and write down the additional information required on New Catalog Data Collection Sheets. They will then enter the catalog number directly into the Mobile Device using the keypad. On a regular basis, this information will be entered into the Bar|Scan system by the Project Manager and new catalogs will be synchronized during an upload and/or catalog bar code menu lists will be printed for use during the inventory process.

EACH DAY

Each day the Team Leader should give the Project Manager photocopies of the Data Collection Sheets used that day and Team notes including: the Date, Building, and floor or area covered that day, and Initials of Team members.

Team Leaders will lock away all equipment including Mobile Devices (once uploaded), cameras, and cell phones.

At least once a day, the Project Manager will upload (send the data the inventory crew has collected to the host computer) either by the USB connection or Wi-Fi. This data is transferred into the Transaction table for error checking and editing before it can be moved to the Asset table.

The Project Manager should validate the Transaction table, to let the system check for errors. The Transactions which display error messages are referred to as “bad transactions”. While there may be an error according to the system, the information may be correct. A report of the “bad” transactions should be printed. Bad Transactions can be printed in a number of report formats, we suggest that they be printed by location so that a physical audit can be performed, if necessary.

Error messages, when displayed on the report, will appear directly beneath the affected asset.

Most error messages may be handled easily by entering additional items into the system. For instance, if the asset was inventoried and a label scanned and applied, the Mobile Device holding the information is uploaded to the Transaction table. If the Catalog was created and assigned that day, and not yet entered into the system, an error message will appear on that Transaction saying “Catalog number is not on file.” Entering the Catalog into the system and re-validating is all that is required to fix this error, if it was in fact a new Catalog. If not, it may be a typo -- which shouldn't happen if team members are selecting from a pop-up or scanning Catalog numbers from a bar code menu report.

Any assets that were Tagged twice (re-scanned) will be displayed with an error message saying they are duplicate Asset Number. The Project Manager will review the database to decide if one of the scans is truly a duplicate that can be deleted.

Other typical errors include "Location Not in Location Table" which means that the Location entered into the Mobile Device has not been entered into the Location table. These are usually new Locations that have not been supplied to the Project Manager or typos -- which shouldn't happen if Team members selecting from a pop-up or scanning Location bar code menu reports. However, if the floor plans are out of date or incomplete, these certainly can be new locations.

Another error is "Unknown Organization Code" which means the Organization Code does not match any of the items in the Organization table. The new Organization needs to be added to the Organization table, or the Transactions should be edited to reflect the proper Organization Code. Remember that collecting this information is optional and not always collected during an inventory.

All errors should be reviewed carefully, and the Project Manager may need input from Team members to determine action to be taken. In most cases, the problems can be handled by editing Transactions, without revisiting the site.

New Transaction Reports will be printed by Inventory Initials, Date, and Time, and by Asset number *or* by location. All Transaction reports should be kept, chronologically. The Project Manager will refer to Team members' notes to make any changes, edits, or deletions they may indicate. All inconsistencies, missing information, questions, and noted duplicates should be communicated to Team Leaders at the earliest possible opportunity.

The Project Manager prints all assets by Current Location and looks for reasonableness. Does every Desktop have a monitor or every office have a desk, chair, file cabinet? Next, the Project Manager prints all Assets by Asset Number and looks for missing asset numbers, and odd numbers.

When Transactions have been corrected, validated, and printed, they can be moved to the Asset table.

The Project Manager will have the teams perform an audit of the inventory to assure the work is as thorough and accurate as possible. This is a very important part of the process.

At the end of the inventory job, we recommend that you print three types of Asset reports; one report by Asset Number, one by Catalog Type and Description, and one by Current Location. Management is asked to review these reports.

Once Management has approved the database and any changes are made, if any, the reports are rerun and the final database is installed on the User's computer.

KEEPING THE ASSET INFORMATION CURRENT

A decision will have to be made soon after Bar|Scan is installed and initial tagging has been accomplished regarding the information on each asset.

✓ Will we update the asset information to keep it current?

✓ What is *current*?

✓ What information will be kept current?

✓ How much activity is required to maintain current asset information?

✓ Who will be responsible for maintaining current asset information?

✓ Who provides the updated information?

Bar|Scan has many features designed to promote the maintenance of asset information at a regular and ongoing basis. Older computerized asset systems have not provided the ability to quickly find and update an asset or a group of assets. Consequently, an *ongoing* asset information update has not been a consideration; it was just not done.

The features of the Bar|Scan system and the Mobile Device promote the feasibility, and the desirability of an ongoing asset information update.

The three major asset information update activities are:

✓ Keeping track of the physical location of, and the organizational responsibility for, the assets as they are relocated

✓ Entering newly obtained assets

✓ Updating or interfacing assets with the accounting system or IS repository

The ability to track the physical location (and the organizational responsibility) of assets is one of the important features of Bar|Scan. This can be accomplished using either the Desktop or the Mobile Device portion of Bar|Scan.

At a minimum, we recommend that the assets involved in a formal planned facility move be updated to show the latest physical location. This can be accomplished by directly entering the changes into the Desktop portion of Bar|Scan, or by using the Mobile Device to record the assets and their new location.

Other asset movements can be recorded as they become known or, at the least, the location will be recorded during the next inventory.

FACILITY AND ASSET MOVES

There are many ways to handle the movement of assets within your facilities. Bar|Scan makes it easy to record a change to the physical location of any particular asset or any group of assets. As there are a number of reasons assets move around in your facility, you will want to define the types of moves you will want to record. Some of the situations you will want to consider are:

✓ Formal relocations which require facility layout drawings and construction

✓ Moves of groups of assets to nearby locations (relocation of a department or group)

✓ Movement of assets to and from storage

✓ Movement of assets between departments (such as semipermanent loans)

✓ Movement of assets because of a break-fix or upgrade

✓ Informal asset moves between individuals

Each of the above situations may indicate a somewhat different procedure. You may even choose not to record these movements at all but wait to record the changes during the next physical inventory.

We recommend you establish procedures to handle at least the first three items above. These situations usually involve Facilities Management and you can easily formulate simple instructions for recording the new locations when the moves take place.

Procedures for the other kinds of moves will require the cooperation of the different departments and individuals. Formal procedures are usually more difficult to formulate and considerably more difficult to implement. You may want to consider an informal procedure (such as, when you hear about it you record it, otherwise the changes are recorded during the next inventory).

These considerations are governed by your company's policy and how determined your company is about enforcing the policy.

HANDLING NEW ASSETS

Your company is continually acquiring new assets. They can be purchased, leased, provided by a customer, or in some cases, provided by an employee.

As these new assets are acquired, you will want to tag the asset, and record information about the asset.

The procedure you establish will depend upon the nature and adequacy of your current procedures for receiving material. Many companies have a formal receiving department which records the receipt of incoming material. However, many times, these same companies will have equipment or furniture delivered direct to the individual or department requesting the asset.

Many times, notification of the receipt of new assets is left up to the requester. This may or may not be adequate depending on the nature or your organization.

The following paragraphs provide, in general terms, some possible methods, considerations, and suggestions.

- ✓ If your company's IT or Facilities Department operates a storage area which is used to receive and distribute ALL incoming assets, new assets can be tagged in this area and locations can be recorded when delivered to the requester.

Procedures for this situation are easy to formulate and easy to implement. However, a Facilities Department receiving function is not very often found in companies.

✓ Many companies have a formal Receiving Department which handles all incoming material. In this instance, a procedure could be established to notify the IT or Facilities Department whenever new assets are received.

Even in companies having a formal Receiving Department, it is common for certain kinds of assets to be delivered directly to the requester.

✓ If your company has a (central) Purchasing Department that handles purchases and leases of new assets, you may set up a procedure to obtain a copy of all purchase orders that apply to new assets.

Usually a purchase order will identify the nature of the asset(s), a delivery date, and the final destination within your company. You can use this document to plan the tagging operation.

✓ If your company uses a purchase requisition procedure, you may be able to obtain copies when new assets are involved. Similar to the purchase order, you can use this document to plan the tagging operation.

✓ Many companies assign specific Accounting Department account numbers to leases and purchases of new assets. You may be able to periodically obtain a report from the Accounting Department that will provide current information about recently acquired assets.

✓ Customer and/or Government Furnished Equipment usually requires close scrutiny (particularly Government Furnished Equipment). Reports provided by Bar|Scan will considerably enhance your company's image with your customers when Bar|Scan is used to control these kinds of assets.

These assets are usually acquired and controlled by a specific department or individual. You should be able to set up a simple procedure for tagging these assets when received.

Most often, one procedure covering one of the previous situations will not handle all of the different aspects of your organization. The procedures you establish for new assets will also depend on how current you want the information to be. You may, for example, choose not to record new assets at all; recording the information during the next inventory (this is usually unacceptable). You may choose to establish specific procedures for certain types of assets, and rely on informal notifications for other types of assets.

DISPOSAL OF ASSETS

Just as your company continues to acquire assets, it will also dispose of assets on a regular basis.

Disposals, (or *Salvage* as it is called in the Public Sector) can occur when assets are sold, or when they are retired because of damage, obsolescence, or they are just worn out.

Instead of removing (deleting) disposed assets from the Bar|Scan system, we recommend the assets be retained in the system for a predetermined number of years.

You can establish special Asset Location codes to identify disposed assets. You may want to have different codes for the different reasons for disposal (sold, retired, obsolete, etc.). For example, you could use a "ZZ" code in Region for all disposed assets and then use other codes for Building to identify the different reasons for disposal. Note that the "ZZ" code would make it easy to EXCLUDE these items on your regular asset reports.

You may want to consider using this information to plan a sale of unused assets. There are several information items recorded about the assets in Bar|Scan system which can be used effectively for this purpose.

If you decide to use the Bar|Scan system to track these kinds of assets, you will want to identify the different codes and information before you start to use Bar|Scan.

Another option that is easy to implement for large asset databases, or companies with a high volume of turnover, is to create a separate "Disposal" Bar|Scan database. It is easy to move Asset from one Bar|Scan database to another. By implementing this option, you can easily retain years of information without a significant effect on your "Active" database. The database can even be set up in a way that the "Active" and "Disposal" database contain shared information (tables).

Finally, remember that if you are using Bar|Scan's Activity Logging feature, deleting an asset removes the record from the Asset Table but adds a record to the Asset Log Table.

DESCRIBE THE REPORTS

The Bar|Scan reporting feature enables you to create reports of your own design. You can select which assets to print and in what order, which columns should appear, whether the fields are printed in human readable or bar code form, where you want page breaks and subtotals. You will decide the width of the columns on the page, supply headings, and print portrait or landscape according to your instructions. Once the report is complete, you give it a name, and save it. You can also elect to have the report print or emailed in a variety of forms, including Comma Delimited, XML, CSV, System Data Format, PDF, and Excel for importing into other software packages.

THE SCOPE OF FINANCIAL INFORMATION AVAILABLE

Bar|Scan has purchase, lease, and disposal/sale information. The system was designed as a front-end to your fixed asset accounting system, not as an accounting system itself. However, if you do not have detailed tax reporting needs, Bar|Scan may meet all of your accounting requirements.

Bar|Scan, Inc. does not provide specific accounting or tax advice.

DESCRIBE HOW ASSETS ARE DEPRECIATED

Assets can be depreciated using the straight line method or other methods, provided they are entered into a table. Each asset can have its own start and end dates for the calculation, number of months, and salvage value. If you do not use the Depreciation History option, Bar|Scan calculates depreciation in a fashion similar to a spreadsheet -- if you choose one of the variables, it recalculates all the depreciation fields. The following fields are calculated and stored by the system: base, monthly depreciation, remaining book, accumulated depreciation, year-to-date depreciation. If you use the Depreciation History option, Bar|Scan will save all of your depreciation periods and does accept adjustments to depreciation such as acceleration of remaining book value or change in depreciation method.

BAR|SCAN CAN BE LINKED TO A FIXED ASSET ACCOUNTING SYSTEM

The Activity Log Interface creates a history of activity, behind the scenes, in Bar|Scan for export to an accounting system. You can control what types of actions (add, delete, or change) and which fields will trigger an entry in the activity log table. The Activity Log can be generated for each major table and can be exported as frequently as desired. The output is a complete listing of any fields you select, in a variety of formats that you can also select. Bar|Scan has a scripting feature that can automate the timing of the export or import.

If you are interested in a quicker export without logging or will only be doing occasional exports, you may also export from each table directly or create an ODBC link to exact information as required.

There are few limitations to interfacing the Bar|Scan system. Most problems we have encountered have been due to limitations in the customer's fixed asset accounting software's ability to import new data and change only data.

CHECKLISTS AND SAMPLE MEMO

The following pages are items that you might find useful for your inventory.

INITIAL SUPPLY CHECKLIST

____ A Computer (laptop preferred) with the Bar|Scan program installed (or connected to the network directly or with a remote access application such as those by Azure or Citrix), and Wi-Fi connectivity or a USB communications cable and cradle for the Mobile Device. For larger projects, two or more computers networked

____ *Optional* One rolling cart per team (for team members to transport their items on)

____ *Optional* One shoulder bag per person or work aprons with deep pockets (for team members to transport their items in)

____ One Mobile Device for each person or team, and a spare if possible

____ Cell phones or walkie talkies, one per Team, and one for the Project Manager. At least one member of each team should have a cell phone or walkie talkies, and the phone numbers should be recorded on a list for the inventory crew and the Project Manager.

____ An up-to-date inventory personnel phone roster (and email) for every person participating in the inventory

____ Bar Code Tag Placement Guidelines, one for each team

____ A flash light, a mirror, and a tape measurer for each team, and a spare of each

____ Data Collection Sheets for each Catalog Category

____ Clip boards, at least one per person team

____ Pencils, black pens, yellow high lighters

____ Paper clips, binder clips (small, medium, and large), index tabs, Post its (small and medium)

____ 8-1/2" x 11" ruled note pads for making notes

____ Digital cameras if images are required

INITIAL SUPPLY CHECKLIST PAGE 2

____ Letter and legal size manilla file folders for reports

____ One project file

____ Stationary for memos

Check for anything else that you may need for the job such as:

____ Optional Location and Organization bar code menu lists

____ Location (Maps)

____ Any special inventory instructions for this job

____ Paper for the printer

____ Other

When the inventory involves taking pictures, you will also need to prepare the following items to be sent with the teams:

____ One digital camera and a camera bag for each team

____ One set of Bar|Scan marker boards, felt, and dry erase markers for each team, and a spare set if possible. These were provided in the Bar|Scan Supplemental Binder.

DAILY CHECKLIST

____ Data Collection Sheets for each Category with starting sequence on a legal clipboard

____ Mobile Device

____ Catalog Development Guidelines, a copy of the bar code tag placement guidelines, and a copy of any Special Inventory Instructions

____ *Optional* Catalog Bar Code Menu List if the Catalogs were imported prior to the inventory

____ Floor Plans (Map) with Organizations Displayed

____ *Optional* The Organization downloaded into the Mobile Device or as a Bar Code Menu

____ *Optional* The Locations downloaded into the Mobile Device or as a Bar Code Menu

____ Asset and optional Room Tag Labels

____ A Flash Light(s) with Spare Batteries useful for reading serial numbers that cannot be scanned

____ *Optional* A Tape Measurer(s) usually used only for furniture

____ Hand Mirror(s) useful for reading serial numbers that cannot be scanned

____ 8-1/2" x 11" Ruled Pad for making daily notes and Pens/Pencils

____ Cell phones or walkie talkie (if possible)

If you are taking pictures during this inventory, you will also need the following:

____ Digital Camera and possibly a Spare Battery

____ Marker Boards, Felt, and Dry-Erase Markers

EMAIL or MEMO

DATE: _____

TO: All Employees

FROM: _____

RE: Equipment (or Furniture) Physical Inventory

On *date*, we will begin an inventory of all Equipment (or Furniture) in *Building(s)*. The members of the inventory crew will be wearing _____ (or badge) and have authorization to access your equipment).

They will be applying bar code labels to company-owned Equipment (or Furniture), using Mobile Devices to inventory these items. In some cases, they will be photographing these items as well.

If you have any company-owned equipment that is stored in a closet or drawer, please reveal these items to the inventory crew.

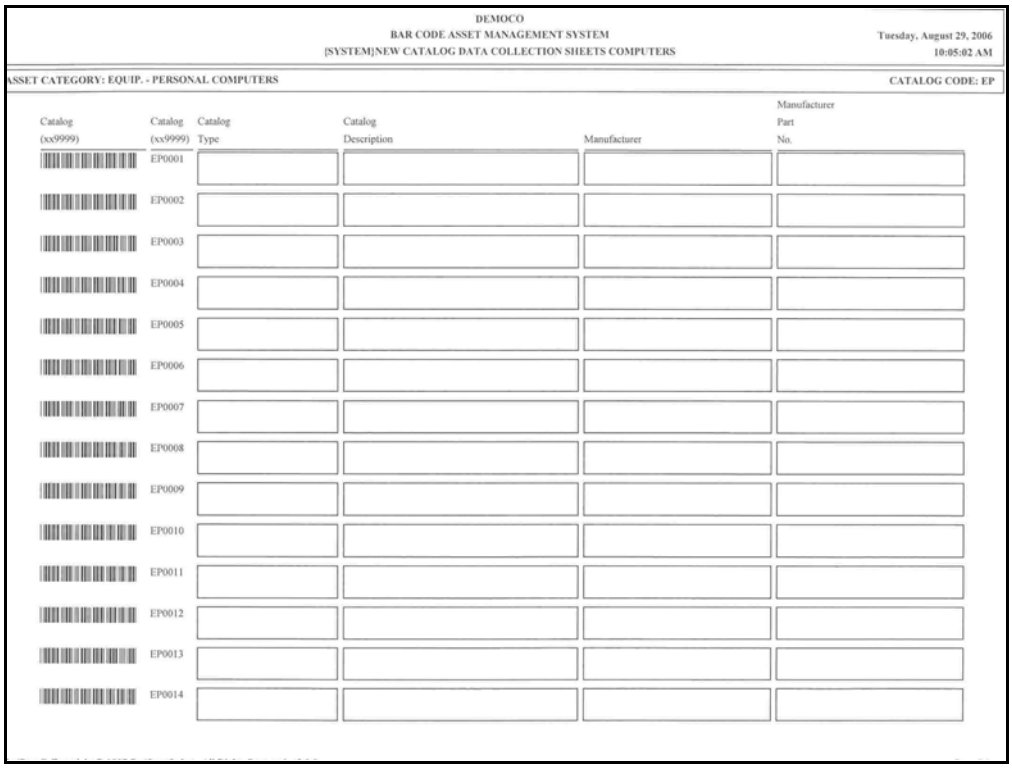
If you are using a personal computer in your office, they will ask you to save and exit the program you are currently using. Laptops must be placed on desktops and docked (or undocked). This process will take between 10-15 minutes. When they have completed the inventory, you can return to your work.

If you have any general questions about the inventory, please contact me directly at phone: _____ or email: _____. If you have technical questions concerning your computer or the discovery process, contact _____ at phone: _____ or email: _____.

Your complete cooperation with these people will be greatly appreciated.

AN EXAMPLE OF A CATALOG DATA COLLECTION SHEET

Bar|Scan provides a useful Catalog Data Collection sheet that can be printed prior to your Tagging. The Catalog Numbers are auto-generated. Scanning the Catalog and completing the form will assist in the Catalog data collection during your inventory. The report title is "New Catalog Data Collection Sheets Computers". The report can be modified to meet your Catalog collection requirements.



DEMOCO
BAR CODE ASSET MANAGEMENT SYSTEM
[SYSTEM]NEW CATALOG DATA COLLECTION SHEETS COMPUTERS
Tuesday, August 29, 2006
10:05:02 AM

ASSET CATEGORY: EQUIP. - PERSONAL COMPUTERS
CATALOG CODE: EP

Catalog (xx9999)	Catalog (xx9999)	Catalog Type	Catalog Description	Manufacturer	Manufacturer Part No.
	EP0001				
	EP0002				
	EP0003				
	EP0004				
	EP0005				
	EP0006				
	EP0007				
	EP0008				
	EP0009				
	EP0010				
	EP0011				
	EP0012				
	EP0013				
	EP0014				

Do not reproduce or duplicate the Catalogs Numbers on these reports. Doing so may result in different items being assigned the same Catalog.

INSTALLING SOFTWARE

INTRODUCTION

Before you attempt to install Bar|Scan on your computer, read ALL of the sections in this chapter.

The topics covered in this chapter include the following:

✓ Bar|Scan hardware requirements - the computer equipment you must have

✓ Configuring your computer system

✓ Installation instructions for the Bar|Scan System

✓ About the Demonstration System

✓ Backing up Bar|Scan

✓ Other Administrative Questions

BarScan has two main versions. The installation process for each version is similar.

Single User License - Although it may be installed on a server or desktop, the single user version of Bar|Scan will ONLY allow a single-user to access it at a time. All of the Bar|Scan files MUST be installed on, and operated from, a single computer, and only one user at a time.

Local Area Network (LAN) License - a LAN license can only be installed on one (1) server. It can be accessed from multiple computers on the LAN or Wide Area Network (WAN).

BAR|SCAN HARDWARE REQUIREMENTS

PERSONAL COMPUTER

The Bar|Scan recommended minimum system requirements are located on our website on the Solutions Tab.

The direct URL is:
https://www.barscan.com/software

There are 2 main sections, as follows:

Bar|Scan Software minimum system requirements

Bar|Scan SmartClient Software minimum system requirements

The SmartClient requirements are only applicable for this single module. If you are not installing the SmartClient, ignore these second requirements.

PRINTER

Bar|Scan will work on any Windows compatible graphics page printer such as the Hewlett Packard LaserJet series. Many Zebra Brand printers can also be used to print bar code labels. Printing your own labels is generally for short term use only and not recommend for asset labels.

BAR|SCAN MOBILE APPLICATION IN MOBILE DEVICES

Bar|Scan has been tested on and is fully compatible with the following portable Mobile Devices:

The Handheld Products Nautiz X6, the Zebra EC50, MC3300, and other Android based phones and tablets.

Older devicess include the Motorola/Symbol MC55A0, MC5590, MC3000, MC3100, MC3200, MC9000, MC9590 and MC9190 are still supported but we no longer provide Bar|Scan application software upgrades to these devices.

The Bar|Scan Mobile app is Wi-Fi and cellular compatible.

THE INSTALLATION OF BAR|SCAN

SERVER AND SINGLE USER SUMMARY

1.) Install the Bar|Scan Application Program. The installation for both the server and a single computer begin in the same manner.

2.) If you have a Local Area Network (LAN) or a Multiple Company version of Bar|Scan, you do not need to access the server console. Bar|Scan can be installed from the client workstation's desktop or a remote access application.

3.) If you are NOT using a remote access application such as Microsoft Azure Cloud or Citrix XenApp and you will be using the Bar|Scan software on more than one computer, then you will be following these instructions.

Install BarScan on the server and nothing on the local desktop except a shortcut. There are several ways for the Mobile Device to communicate with Bar|Scan, and this is discussed later.

4.) If you are using a remote access application such as Microsoft Azure Cloud or Citrix XenApp, then contact us for detailed installation instructions.

Install the Bar|Scan Program

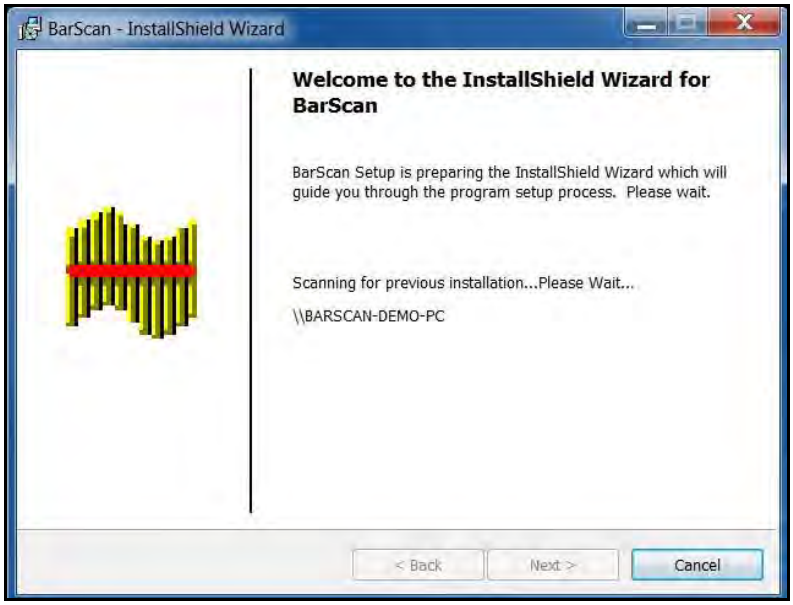
These instructions are for installing the Bar|Scan program on any of the compatible Windows Operating Systems.

Place the Bar|Scan CD into your computer's CD Rom drive. If your drive is configured for autorun, then the program should begin automatically. You will see a window similar to the one on the following page.

Bar|Scan® Installation Helper
You may install BarScan programs from here, as well as view some important documents.
Browse [D: \] for additional manuals and handheld installation files.
Install
Bar|Scan
View
Bar|Scan User Manual
Bar|Scan Version Information
Website: www.BarScan.com
Phone: US (805) 777-0079
Email: Info@BarScan.com
Close

We expect the above window to appear automatically when you insert the CD. If for some reason it does not appear, and you see the following window instead, select “Run BsInstallHelper.exe”.

To begin the setup of the Bar|Scan program, select Bar|Scan from the Install portion of the window. You will see a window similar to the following:

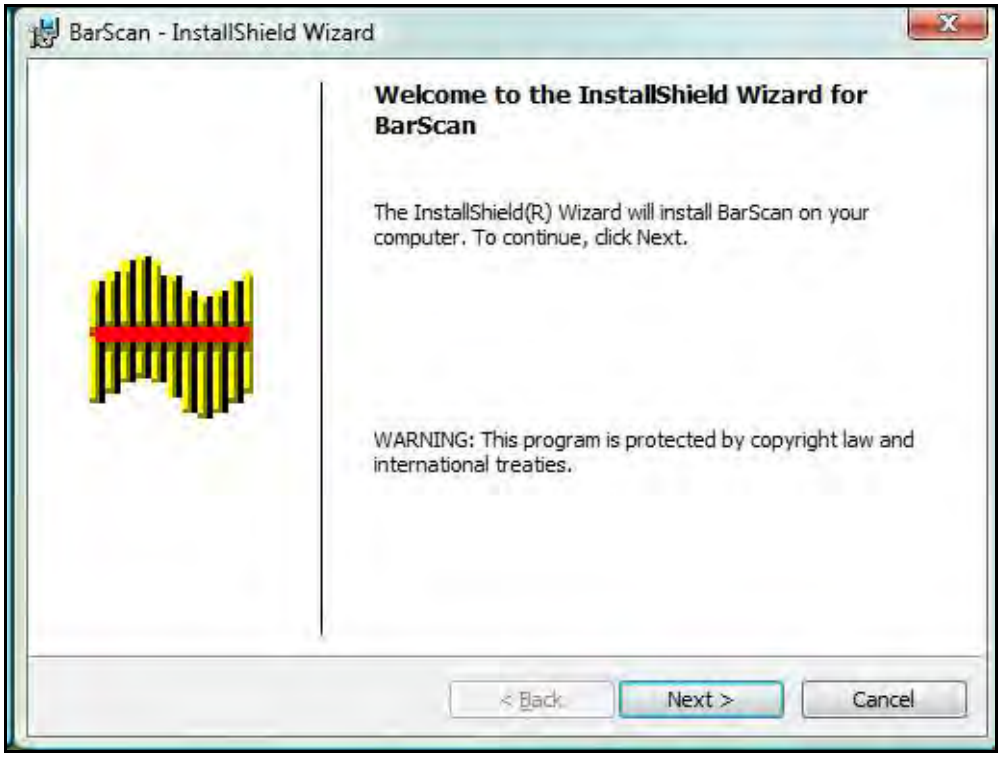


Bar|Scan will search for a previous installation. This may take some time on larger networks. When completed, you should see a panel like the one below

If you know where your previous Bar|Scan installation resides or you wish to cancel the search, Canceling the scan does not abort the actual installation. You then have the opportunity to specify the Bar|Scan installation location manually. If you press the <esc> key you get this dialog. Say 'Yes', then it continues to the point where you can specify your selected location

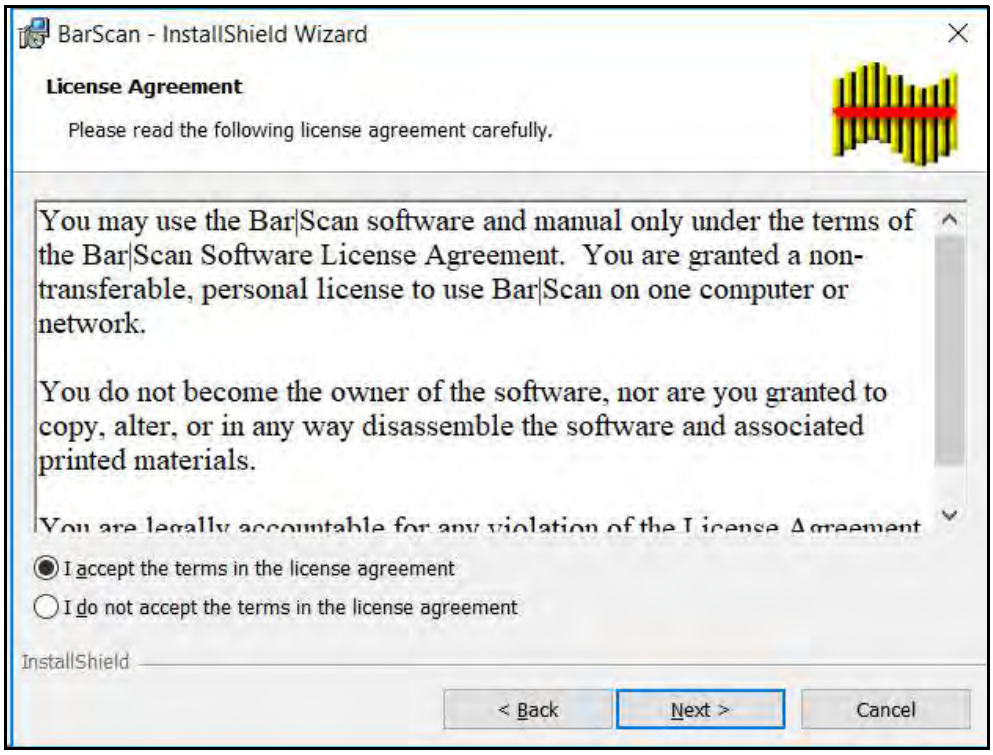
Bar|Scan select the default location as the local C: drive, but you can change it to the network drive.

When you are ready to proceed, click the *Next* button.



The installer will begin, and will guide you through the installation of the Bar|Scan program.

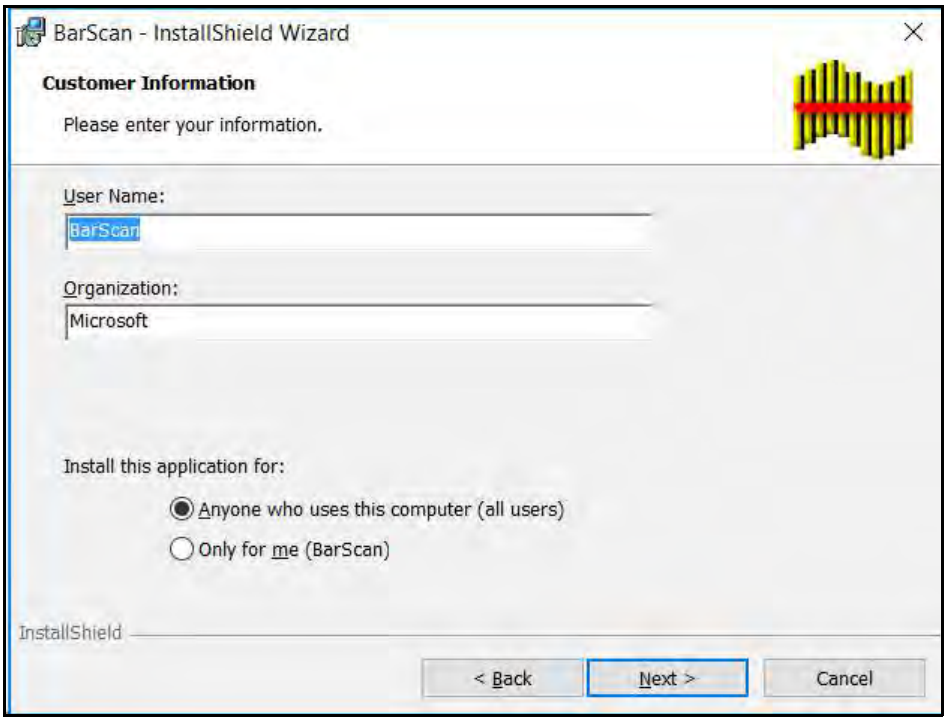
You will be shown a window similar to the one below:



Read the license agreement that is displayed. If you agree to the terms stated, click *I accept the terms in the license agreement*, then click the *Next* button.

Or, if you do not agree, select *I do not accept the terms in the license agreement* and the setup program will terminate.

You will see a box similar to the one below:



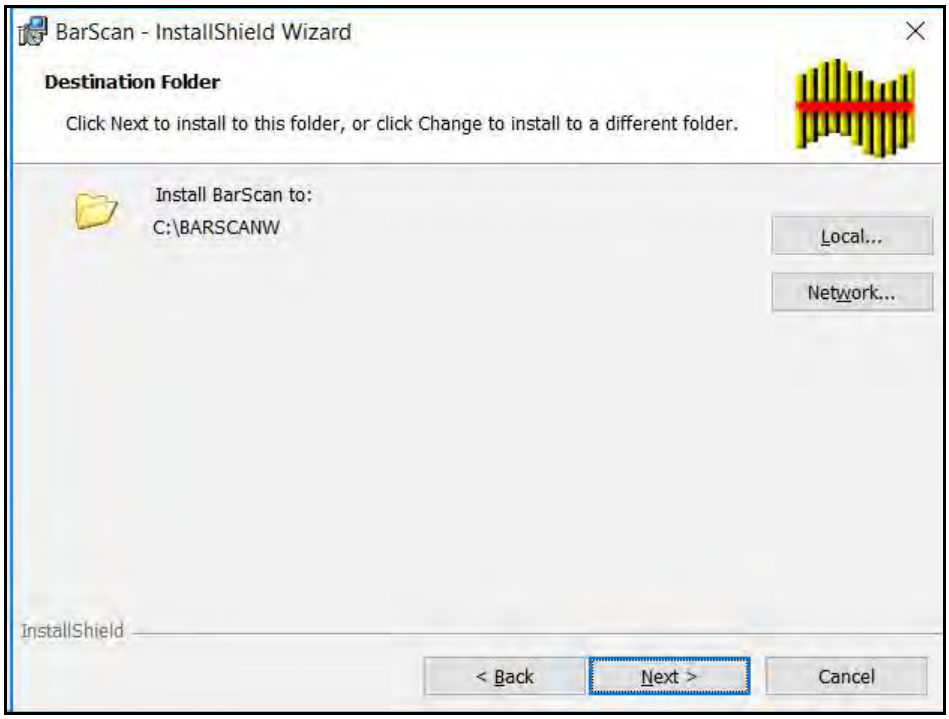
Your name and the name of your company will normally appear in this window. If they do not, fill out the User Name and Organization as appropriate. Select whether you want all users or just yourself to be able to use the program.

Note: Users are designated as such in the Control Panel on your computer. It is possible that you may be the only user, or you may share your computer.

If you select *Anyone*, and you add a user later, they will automatically have access to the Bar|Scan program.

When done click the *Next* button.

You will see a window similar to the one below:



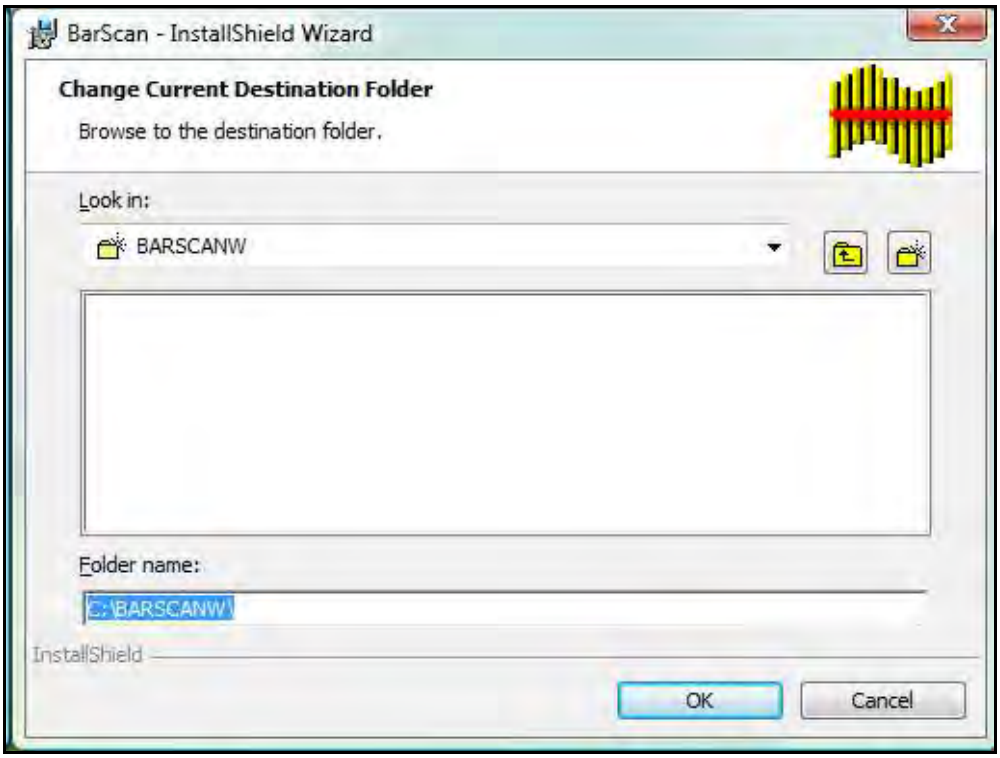
This window gives you the option of installing Bar|Scan into the C:\BARSCANW\ location or any other folder by selecting the *Local* or *Network* buttons. If you want to install Bar|Scan onto your own computer or you know that it will be put onto a permanently mapped drive, select *Local*.

Note: While UNC access is preferred, if a server is permanently mapped, select the Local button, not Network.

If you want to install Bar|Scan somewhere else on the network and are not using permanent drive mapping, select *Network*. Another way of deciding is that if the installation location starts with a drive letter then select *Local*. If the installation location starts with a double slash (showing a network resource) then select *Network*.

If you are installing this software onto a server, you may need to change the default destination to reflect your server's hard drive.

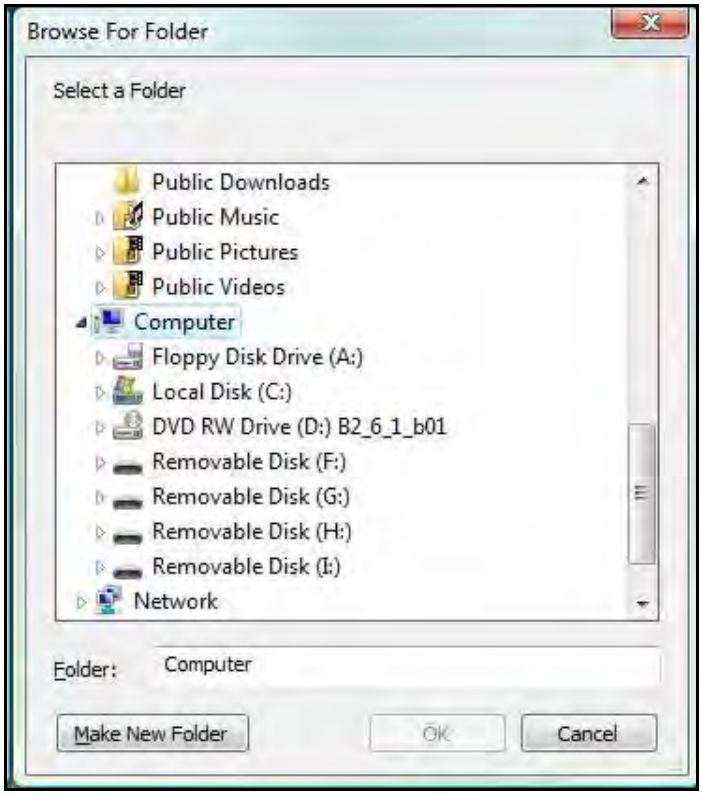
If you select the *Local* button, you will get a window similar to this:



To change the default destination folder simply edit the Folder name or navigate to the desired folder using your mouse. Don't forget that this dialog will only see local and mapped drives.

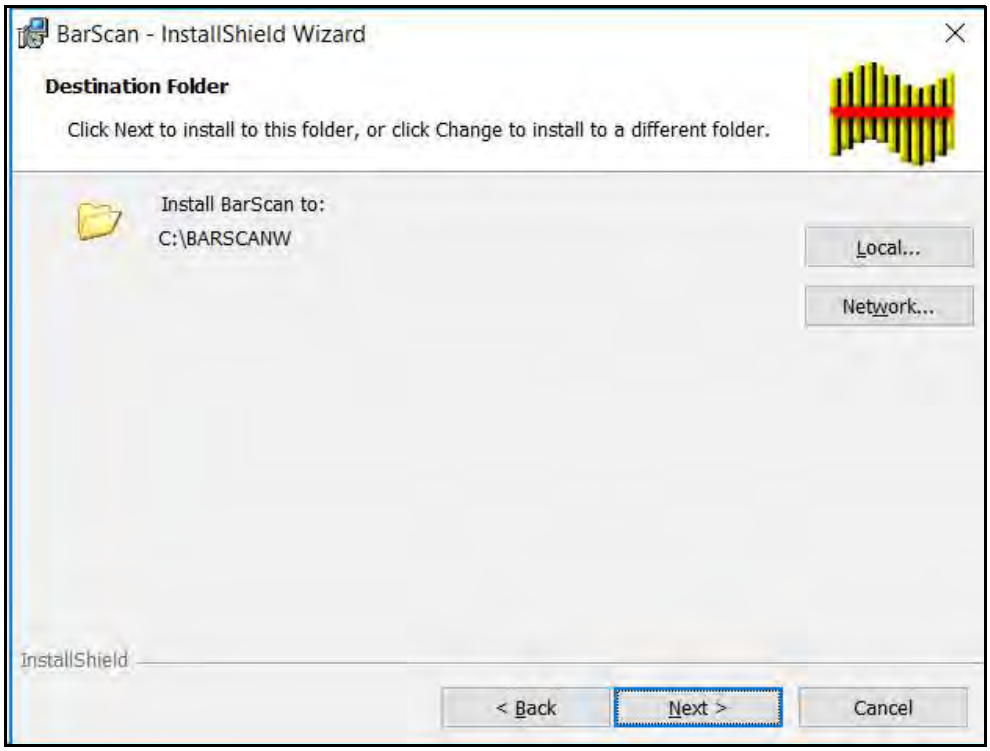
When done select *Ok*. If you want to go back to the original path select *Cancel*.

Alternatively, you can select the *Network* button. You will get a window that looks something like this:



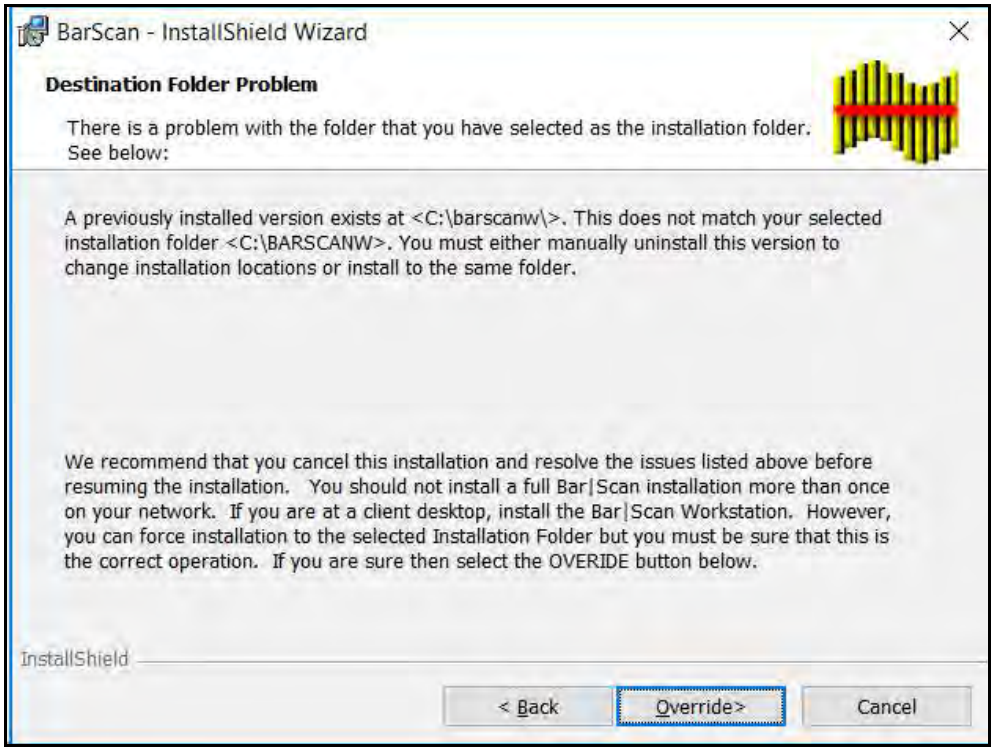
Navigate to the desired folder then select *Ok*.

The previous window should still be open.



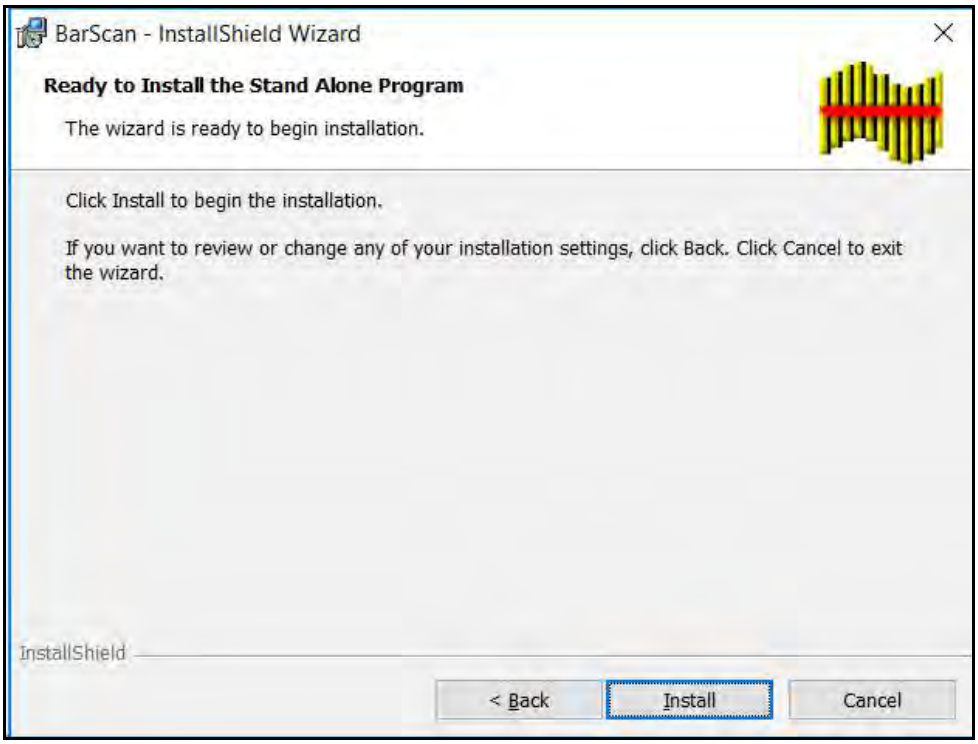
Verify that the correct location is being displayed. When you are ready to proceed, click the *Next* button.

If you are performing a new installation and if Bar|Scan detects a previous installation as show below.



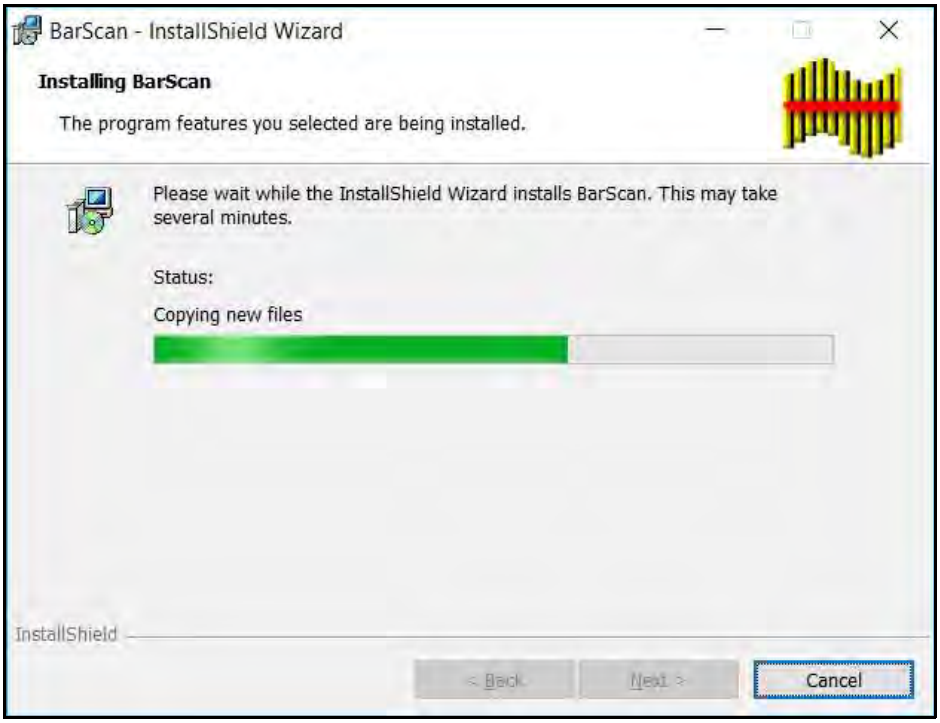
Cancel the installation and request assistance from Bar|Scan, Inc. or your local Bar|Scan Dealer.

At this point, you will see a window similar to the one below:

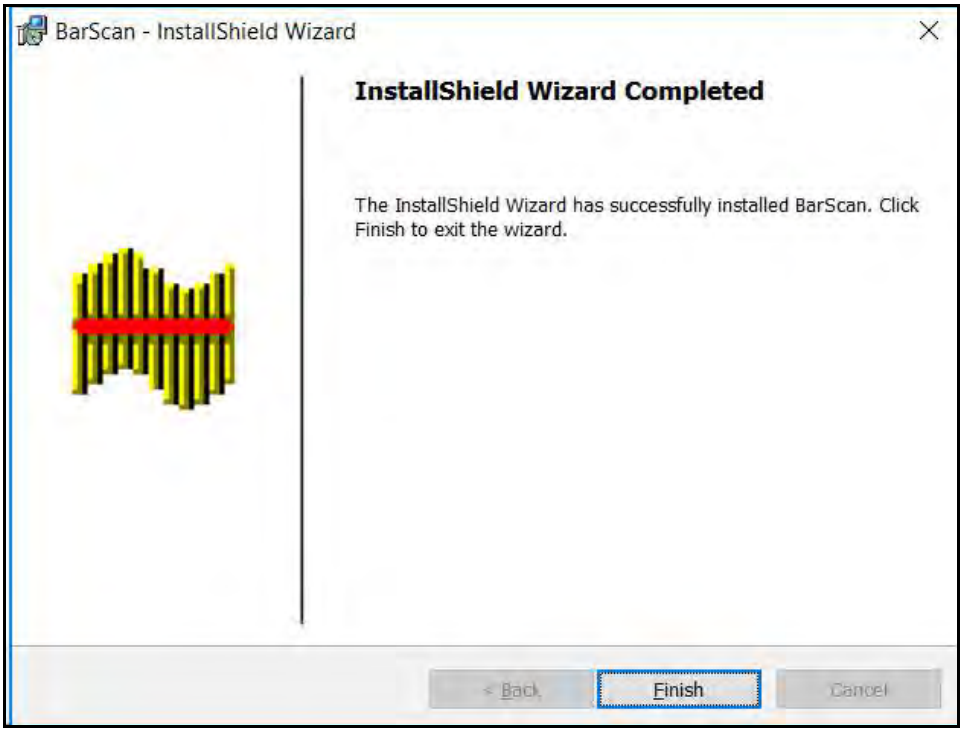


Click the *Install* button to continue the installation process.

You will se a window which demonstrates, using a slider bar, the progress of the installation.



When the installation is complete, you will see a window similar to the one below:



Bar|Scan has been successfully installed. During the installation, a bar code font was automatically added to your list of fonts, so that you may print bar codes from your computer.

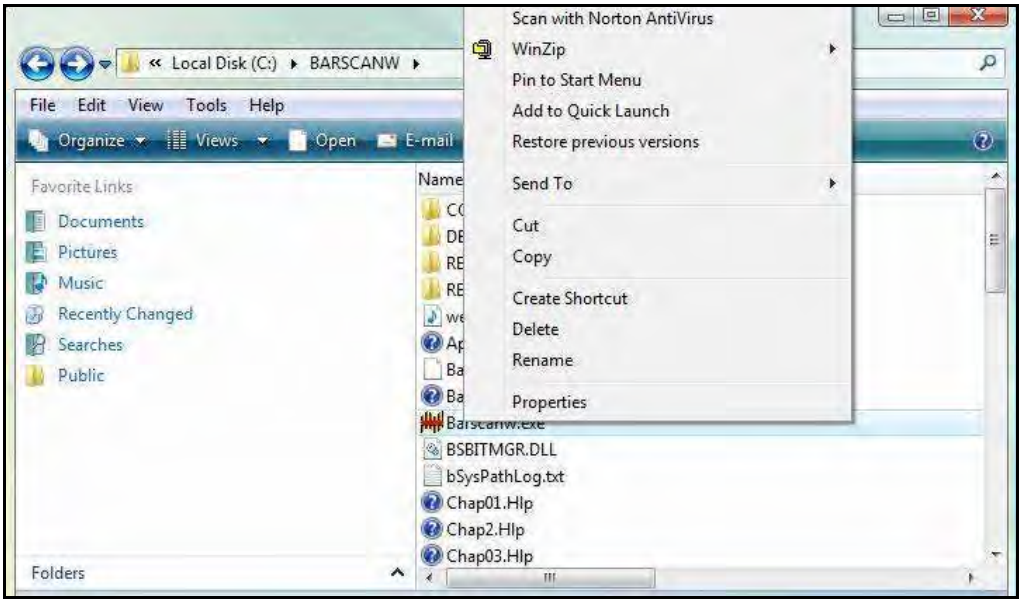
You will see an icon has been added to your desktop. The icon should appear similar to the one shown below:

You may access the Bar|Scan program by double-clicking this icon.

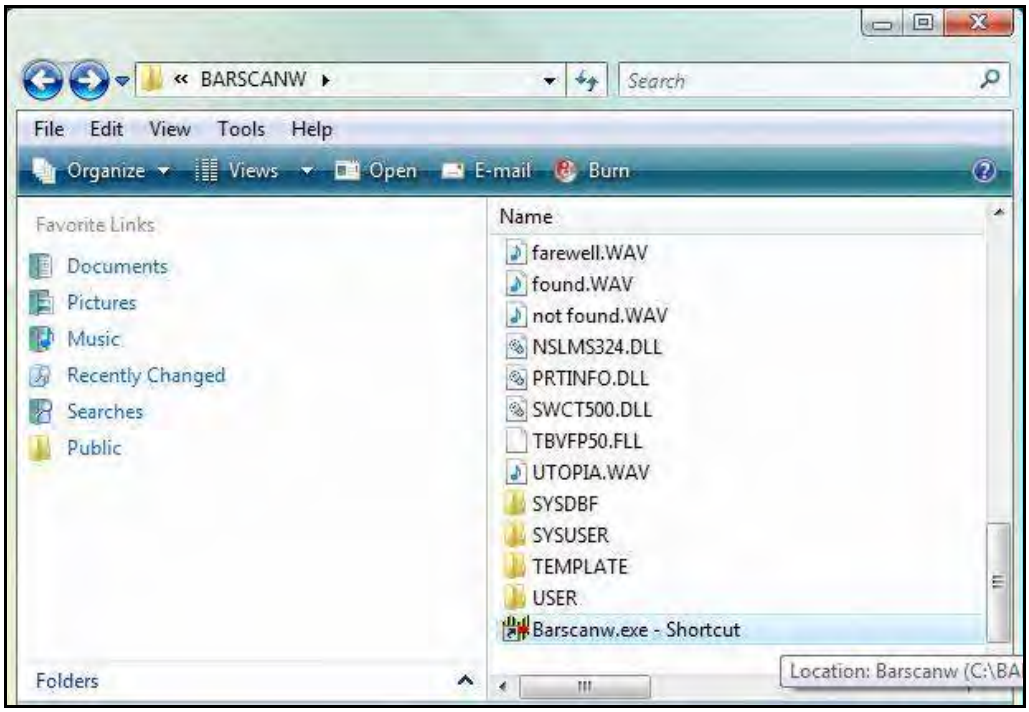
Creating a Bar|Scan Icon

Once Bar|Scan has been installed, you will want to make an icon for your desktop. You will need to browse to the server's drive where the Barscanw folder resides. Double-click the icon for the Barscanw folder. You will see a list of files such as listed in the picture below.

Find the Barscanw.exe file, and use your right mouse button to click on it. You will see a drop down menu similar to the one below. Select *Create Shortcut* from this drop down menu.

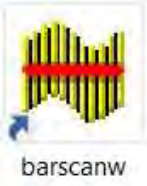


A new icon will be added to the Barscanw files. When an icon is added in this way, it will appear as the last item in the list. Use the scroll bar to go to the bottom of the list of files. Left-click the shortcut icon and drag it to your Windows desktop.



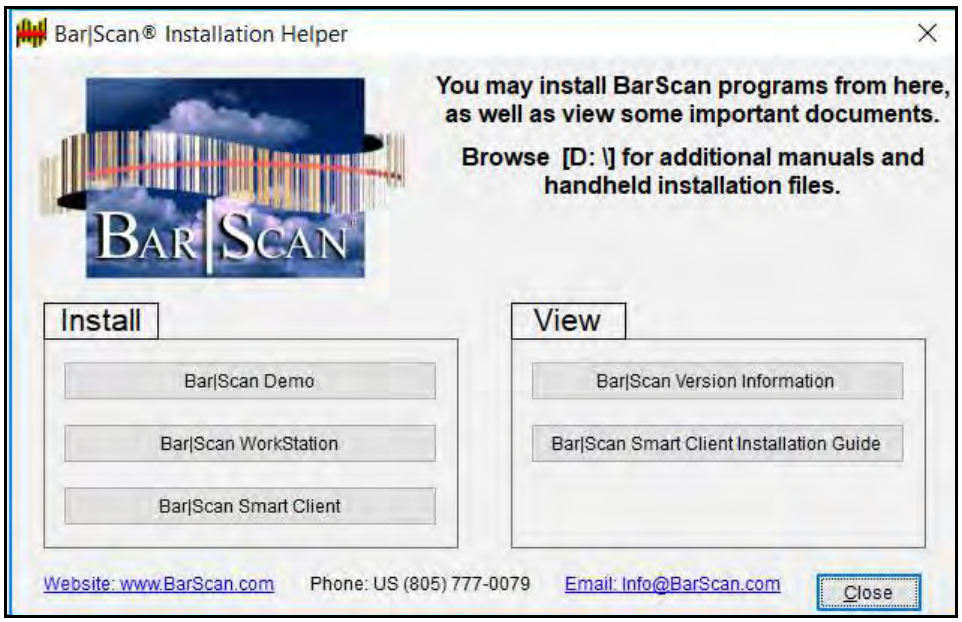
Move your new icon to a desirable location on your Windows desktop. You can now easily access Bar|Scan by double-clicking this icon.

If you like, you can change the name that appears under the icon by clicking the title, then typing a new title. Click outside of the title area to save your changes.



INSTALLING AND USING THE BAR|SCAN SMART CLIENT

Place the Bar|Scan Auxiliary CD into your computer's CD Rom drive. The program should begin automatically. Click on the Smart Client Install Guide button as displayed on the screen below.



Adobe Acrobat Reader should open the Bar|Scan Smart Client Quick Install Manual. If you do not have Acrobat Reader installed, it is available from www.adobe.com .

This manual describes the Bar|Scan Smart Client in a concise format. This manual describes the installation of the Bar|Scan Smart Client in a concise format. This installation requires knowledge of Windows Server software and does require more experience to install than the Bar|Scan Application. For more detailed installation, browse to the documentation on the Bar|Scan CD.

The Bar|Scan Smart Client is installed by Clicking on the 'Bar|Scan Smart Client' Install button on the Bar|Scan CD.

Using Microsoft ClickOnce deployment technology, the Bar|Scan Smart Client can be installed throughout your environment for quick access to your Bar|Scan assets.

This product is ideal for installations that require a large number of users that wish to have simple access and reporting with limited editing.

This product is a Client/Server product separate from the Bar|Scan Application. However, it's display is controlled by the Bar|Scan Application by modifying existing and new fields on the User Defined Fields Tab. Therefore, to customize the Bar|Scan Smart Client requires the installation of the Bar|Scan Application somewhere on the Network.

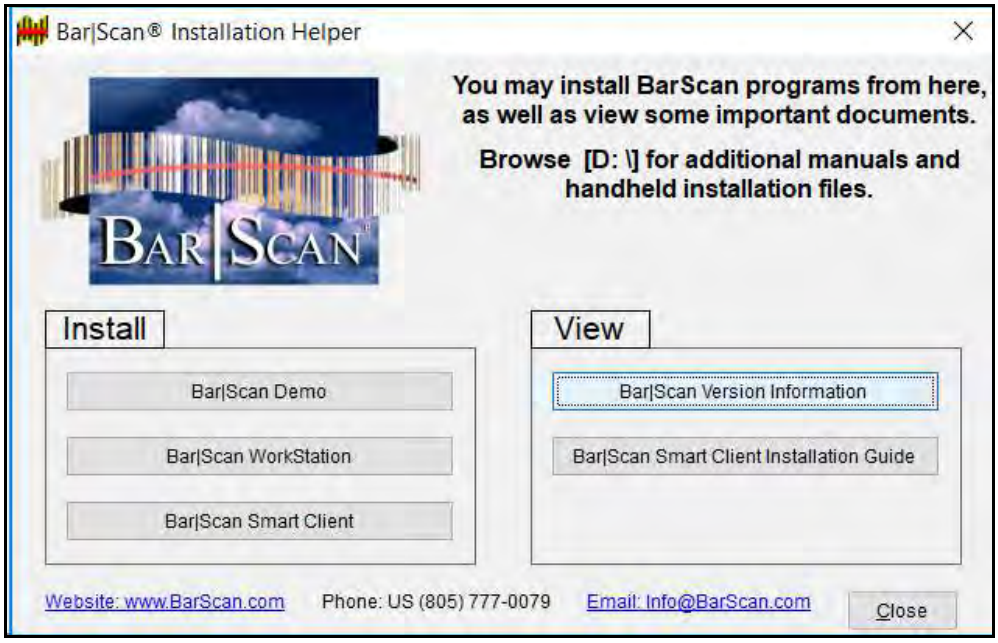
It does not require Bar|Scan to be installed on the same desktop PC.

Once installed, users can browse, sort, or print assets. Filters can be assigned by user password so that only assets in their area of responsibility are accessed.

An optional module allows editing of existing Asset information.

INSTALLING THE BAR|SCAN DEMO COMPANY

The Bar|Scan supplemental CD contains a functional demonstration system called Bar|Scan Demo. To install this item, place the CD in your computer's CD drive. The installation program should begin automatically. You will see a window similar to the one below.



Select the *Bar|Scan Demo* button from the panel. The installation program will begin.

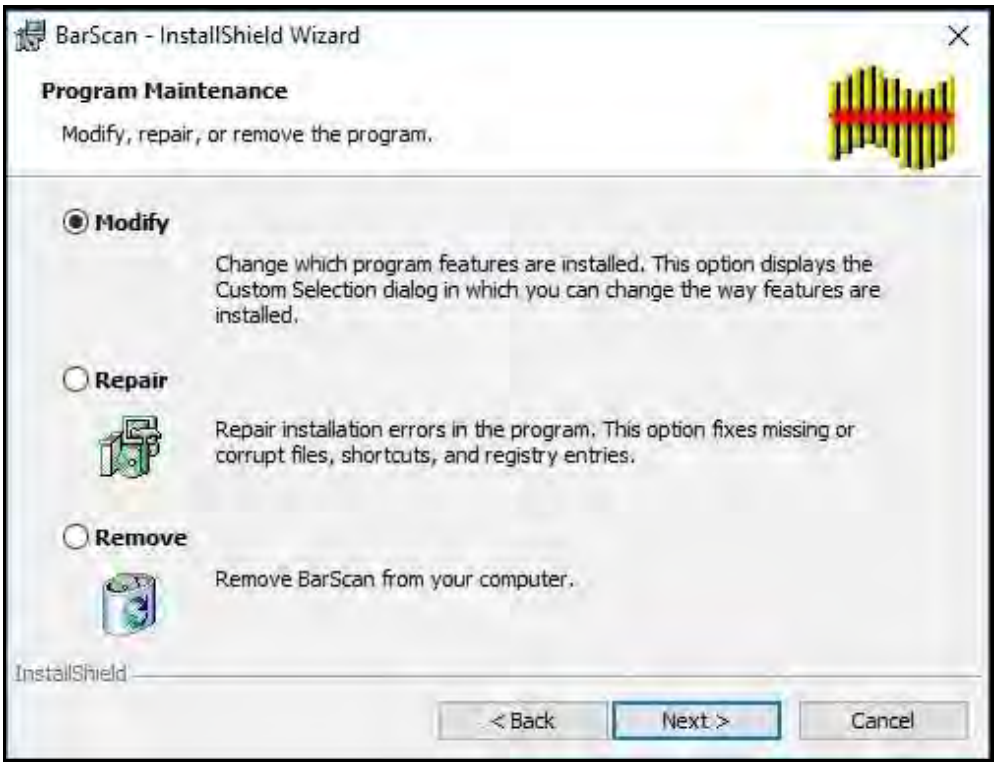
From this point on the installation instructions are exactly the same as for the standard Bar|Scan installation with one exception.. the default installation folder is C:\BARSDEMO.

Important: If you change the installation folder be careful not to overwrite any active Bar|Scan installations (typically C:\BARSCANW) as you may lose data.

REPAIRING OR REMOVING SOFTWARE

If you need to repair non data Bar|Scan files or remove any of the Bar|Scan software, you may do so by accessing your installation CD and selecting the Install button for the item you wish to remove or repair.

You will see a window similar to the one below.



Note: You may access this same window by going to your Window's Control Panel and then selecting the *Add or Remove Programs* option. When the *Add or Remove Programs* window opens, select the software that you wish to repair or remove. Select the *Change* button. You should see a window similar to the one displayed above.

Click the Repair or the Remove option, then click the Finish button.

If you selected the Repair option, the repair process will begin immediately. A repair is basically a reinstallation of all non data files. The registry entries, runtime, the Bar|Scan program, fonts, menu entries and shortcuts are repaired. Files in Company, Sysuser, and User are not repaired.

If you select to uninstall the software, the uninstallation process will begin immediately.

All non data files installed by the package are removed. The data files that are in Company, Sysuser and User, or any companies that were added by a user are not touched during this process.

CREATING A MICROSOFT AZURE BASED VIRTUAL MACHINE

Creating a Microsoft Azure Cloud based Virtual Machine (VM) that can run the Bar|Scan® bar code asset management system requires some planning. Settings depend upon the type of Bar|Scan installation desired. Some of the possible configurations are:

1. Standalone single classic VM instance.
2. Single VM instance with a network connection to your internal network.
3. VM acting as a Remote Desktop Server Host.

There are many other types of server configurations. You will have to decide which is best for your organization. This document does not claim to discuss all of the various possible configurations, but rather, presents a simplified version of one way of creating a VM that works. In addition, Azure currently has two available portals available for creating and managing Azure resources. Both the new and classic portals can be used to create a successful Bar|Scan installation.

If at any time you have questions about this installation, please contact us at info@barscan.com. Additional resources can be found on the Microsoft Azure website at: https://azure.microsoft.com

BACKING-UP AND RESTORING BAR|SCAN DATA

There are many backup technologies in use today, ranging from cloud based server backups to high transaction replication servers. Which method is selected is ultimately up to you.

All of these technologies have the same goal, to reduce the cost of the loss of data. Losing data costs money in lost productivity and man-hours. However, the backup strategy needs to match the value and type of data. Some backup strategies have a substantially larger ongoing cost that others while giving no substantially greater protection of data due to either the nature of the data or the role of the data in the company.

Bar|Scan recommends the classical backup strategy of using a backup program to back up Bar|Scan data folders on a daily, weekly, and monthly basis to another server, backup device or cloud. Bar|Scan is not a high transaction data system and damage to data tables is most often confined to a single table set. Damage to indexes can be corrected within Bar|Scan itself. In fact, standard inventory practice requires refreshing data from real data gathering in an ongoing manner. This backup strategy means the maximum exposure to data loss is at most one day of activity, even in the face of catastrophic data loss, such as an entire server crashing.

The restoration of any file or information should only be done by someone experienced in the operations of your computer and only after the source of the problem is identified. ***Please contact Bar|Scan support before attempting a restore. Many times a full restore is not the best action and data can be fixed with just a phone call.***

email: techsupport@barscan.com

internet: www.barscan.com

US Telephone (800) 414-7226

Overseas Telephone (805) 777-0079

Always make a backup of your current data prior to any restoration from a backup.

It is worth mentioning that Bar|Scan does have built in systems for sending data away to other locations. This is typically NOT for backup but rather for access using a dispersed database model. Do not rely on these for your backups.

Method #1 - Company Synchronization by Network Access

On a manual or timed basis a session of Bar|Scan can copy the changes in one company to another company on the network. The target computer does not have to have Bar|Scan installed. It is just a data repository. If it runs during the day, user's generally are not aware that it is running, but it can at times cause users to wait while it sends data, since any tables sent must be locked to ensure data integrity. This feature requires that a session of Bar|Scan be running, since it cannot currently be activated using the Windows Task manager. The session will need write privileges to the target server.

Method #2 - Company Synchronization by Email

On a manual or timed basis, Bar|Scan can send emails to another Bar|Scan system, which, in turn, can load the data sent to it into its own data tables. This system is valuable for keeping two non-connected databases synchronized, but is not very effective as a backup system. It requires that Bar|Scan and Microsoft Outlook be installed on both computers and either an operator or an automated process must 'catch' the data on the target computer and run Bar|Scan there to load it. Also, while it is accumulating data to send, it must 'lock' its tables so that it is internally consistent, so it is generally not done during normal working hours, although it can be. It can be activated by the Windows Task manager.

Method #3 – Bar|Scan Proprietary Data Transfer files

Users can manually range a set of assets and export them to a data transfer file set, saving them to any server where the user has write privileges. This can be done at any time. It can be all items or just a few. However, it is currently a manual process. This process is normally used to transfer reports and initialize tables, onetime operations.

Method #4 – The Bar|Scan Report Generator (exports)

Reports can be configured to send critical data either on a manual or timed basis. They can be saved to files on a separate server or send as data files or PDF files through email. Again, this process is somewhat awkward as a means of doing backup, but is outstanding for getting critical information, especially by email, to those who need it. It can be activated by the Windows Task manager.

Method #5 – Copy Company Database

An entire company can be copied to another server, either within Bar|Scan or using the Windows file manager directly. Many customers use this simple strategy to keep backups, that is, coping entire companies on a daily basis. If done within Bar|Scan this is strictly a manual process. If done by File Manager, it can be activated by the Windows Task Manger.

Method #6 - Bar|Scan Proprietary Formatted Export

This method is similar to creating reports.

Method #7 - Bar|Scan Company Database Export

This is also a manual process. Ranged items in any table can be moved or copied to another company. This other company can be located anywhere on a network, as long as it can be seen by the user and they have write privileges.

Restoring Bar|Scan Data

By default all current information entered into the system by ***you*** is located on the hard disk in one of the subfolders of the "\BARSCANW" folder. If you have a single-user system, this is usually the "COMPANY" folder but can be any folder name of your choice. However, you or your administrator may have created additional companies and these may be literally anywhere on your network.

Note, "shared" files, such as the User, Catalog and Location files, are in the "SYSUSER" folder. These files should be backed up as well.

Bar|Scan data files begin with the letters *BS* and end in the file extension *DBF*. They can reside anywhere on your hard disk since you control the Folder or Group of Folders in which they reside. The Folders can be viewed through the Windows File Manager or the Bar|Scan File/Open command. **It is not always sufficient to Backup only the \BARSCANW folder on your computer or server.**

To **RESTORE** only your company database:

✓ Start Bar|Scan, access the File/Company/Close/All to close all companies. Exit Bar|Scan.

✓ Restore the entire company or companies' folder from your backup into the Windows folder that you initially assigned to hold the company information. Also, restore any backed up shared files to the sysuser directory.

✓ Start Bar|Scan, access the File/Company/Open and browse to the restored company. Select the company.

✓ Access File/Company/Housekeeping/Table Integrity. Select the company you just opened below in the Company list. Click the OK button.

✓ If there are no warnings displayed by Bar|Scan during the process, then the company was successfully restored. If warnings were displayed, please contact Bar|Scan Technical Support.

To **RESTORE** the entire system:

✓ Re-install the system using the Bar|Scan installation procedure.

✓ If your database was in the "Company" Folder, send the contents of the "Company" folder just created to the Windows Recycle Bin.

✓ Start Bar|Scan, access the File/Company/Close/All, to close all companies. Exit Bar|Scan.

✓ Restore the entire company or companies' folder from your tape or diskettes into the Windows folder that you initially assigned to hold the company information. Also, restore any backed up shared files into the sysuser directory.

✓ Start Bar|Scan, access the File/Company/Open and browse to the restored company. Select the company.

✓ Access File/Company/Housekeeping/Table Integrity. Select the company you just opened below in the Company list. Click the OK button.

✓ If there are no warnings displayed by Bar|Scan during the process, then the company was successfully restored. If warnings were displayed, please contact Bar|Scan Technical Support.

Making backup copies of your Bar|Scan data is your responsibility. We are not liable for loss of information on your computer. By loss we mean both malfunctions of the hardware as well as deletion of your Bar|Scan data, either intentional or unintentional.

If you currently do not have a backup system, at a minimum we suggest that you download a copy of WINZIP at URL www.winzip.com

It can be a useful temporary backup, however, we do not recommend it for permanent backups. It is used primarily to speed the transfer of files when we work on your computer remotely and to compress files for emailing purposes.

Other Administrative Questions

Bar|Scan, Inc. maintains a *Knowledge Base* section on our website to address specific operational issues in a question and answer format. The page is accessible from the Support tab located on our main page www.barscan.com

We recommend that all new users visit our *Knowledge Base* as it provides the most up to date resource on software, hardware and operational issues.

Some of our more frequently asked questions from our *Knowledge Base* are presented on the next few pages.

What are bar codes and how are they scanned?

Bar code can be thought of as a printed version of Morse Code. To read the information contained in a bar code symbol, light is moved across the symbol from one side to the other. The width of the bars and spaces is then translated by the equipment into numeric and alpha characters. There are a number of symbologies or methods for translating bar code symbols. The standard adopted by most facility managers, computer and furniture manufacturers and furniture dealers is Code39.

There are two types of portable bar code equipment used for fixed asset tracking - fixed beam contact devices (contact wands) and moving beam non contact devices (guns). Contact wands have become obsolete and most portables now use integrated guns. The gun's proximity to the symbol is a function of the density of the symbol and the gun's capabilities - typically 1" to 9" for the medium high density labels used for fixed asset applications.

The mobile device is typically programmed to prompt inventory personnel through the data collection process-asking for location, cost center, and descriptive information. The number of characters and lines of display on the portable is important because it is used to give inventory personnel necessary feedback during the inventory process.

What barcode symbologies do you support?

Bar|Scan recommends the user of Code39 symbology which is accepted as the industry standard for the asset management. Most Mobile Device applications also support Codabar, Code 129, and Interleaved 2 of 5 and more. Code39 is alphanumeric and accepts all of the following characters:

0-9

A-Z (uppercase)

_ . $ / + % and “space”

It is well suited for field data collection and employed by all computer manufacturers and most furniture manufacturers.

I need to move Bar|Scan from one server to another, how do I do this?

If you only need to move the program and are not performing a program upgrade, then this is a straightforward process that does not require the Bar|Scan Installation CD. This summary does not include the Bar|Scan Smart Client. If you have installed the Bar|Scan Smart Client, please contact Bar|Scan technical support techsupport@barscan.com in advance for any assistance that you may require.

There are several issues that must be addressed:

1. Computer Privileges or Permissions. You will need to make sure that your Bar|Scan group has exactly the same privileges on the new server location as it does on the old server location. Do not reduce the level of privileges on the new server.

2. Workstation shortcuts. All shortcuts on all workstations will need to be pointed to the new location of the BarScanw.exe application. This can be done by remoting into each PC.

3. Current default company within Bar|Scan. Each Bar|Scan user has a default company that their account opens when they log in. The default company needs to be changed from the company folder on the old server to the company folder on the new server. This can be done in several different ways, but is typically done by logging into Bar|Scan as the end user and then closing the old company on the

old server (File-> Company-> Close) and then using the same login, opening the new company on the new server (File-> Company-> Open).

Summary of how to perform the Move:

1. Obtain Bar|Scan master user credentials.

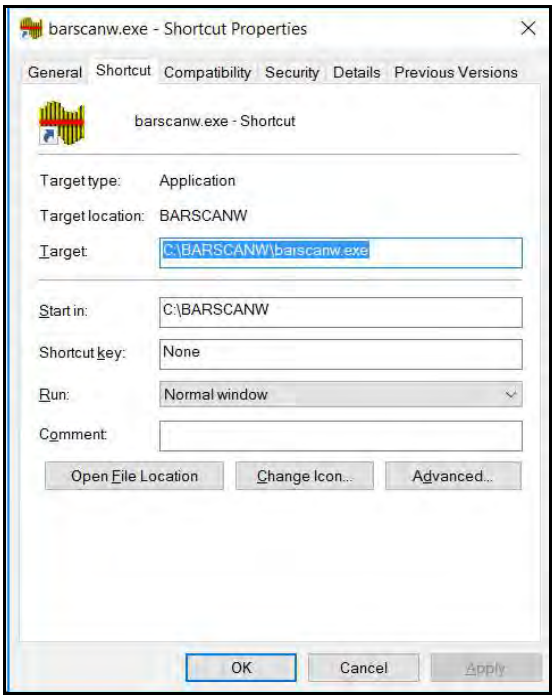
2. Schedule a time for the move and notify all users that Bar|Scan will not be available.

3. Log into Bar|Scan using the master user credentials.

4. Turn on the global user lock. This locks out all users. Wait until there are no more users logged in. The Knowledge Base Article "How can I log everyone out of Bar|Scan" explains this process. You may have to contact people to have them exit, so having phone numbers and/or emails can be useful.

5. Copy the entire \BarScanw folder containing all of the BarScan data and the Bar|Scan program (BarScanw.exe) to the new server. This will typically mean copying folder \\oldserver\BarScanw and all of its subfolders and files to folder \\newserver\BarScanw. When completed, it is recommended that you rename \\oldserver\BarScanw to something like \\oldserver\BarScanwOld so there will be no confusion after the move.

6. Remote into each user workstation and create a new shortcut pointing to the new location of the BarScanw.exe. It is typically easier to create a new shortcut and then delete the old one rather than modifying the existing one. Make sure that the 'Start In' folder is filled in and matches the 'Target' folder as shown on the following page.



7. In Bar|Scan, turn off the global user lock (see website Knowledge Base article "Article "How can I log everyone out of Bar|Scan" previously referred to in this article).

8. Log into Bar|Scan as each user each in turn. You will close all companies for each user and then open the new default company on the new server. This is done for each active user. Note that you do not have to remote into the workstations to do this, but you do have to open companies using the network URL. For example, if your user's default company is on server \\newserver and is in folder C:\BARSCANW\COMPANY, you must open it using the path \\newserver\BARSCANW\COMPANY.

9. Verify that the privileges for the Bar|Scan group are working properly.

10. You are done with the move.

Do I need to be in the Administrator Group to install Bar|Scan on a Laptop or Desktop Workstation?

Yes, installation is the only time that Bar|Scan requires that the user be in the Administrator group. Bar|Scan can be used in other groups if privileges are set correctly. If Bar|Scan works properly in the Admin group but NOT in another group, then it may be a privileges problem with the other group.

What are the Record Locking Priorities?

Record Locking is common in software applications that can be accessed by more than one user concurrently in a Local Area Network (LAN).

Bar|Scan is designed to minimize record locking. Therefore relevant records are locked only when an update (write to disk) occurs. There are two cases where the user will encounter record locking.

- ✓ When a record is selected for updating, the information from the record is copied to memory. If another user access the same record, makes a change, and writes the record back to disk, then the initial information that you originally gathered is no longer accurate when you try to save the record. You are then notified by Bar|Scan if you wish to refresh the record. Refresh means -- *Do you wish to get the new information that was written to the disk by the other user*. If you respond "YES," your changes are lost and you have an opportunity to work with the new information. If you respond "No," your changes are lost and Bar|Scan is ready to perform a new task. Note that in either case, any edits you have made are lost because another user changed the record before you.
- ✓ You can experience a message that says "*filename* is in use by another," where *filename* is the file that you are attempting to access. You are given the opportunity to try and access the record again. This message is not common and can only happen when you and another user perform the same actions simultaneously or the other user is performing a housekeeping function such as restructure, or reindex.

How does your system maintain data integrity in the event of a system failure?

Simple system failures can typically be corrected by reindexing the database at the File ...▸ Company ...▸ Housekeeping ...▸ Table Integrity Menu. Select the Company Database and press *OK*.

Describe the process of data recovery after a system failure.

Hardware failures will typically require restoring data from back-up copies. Software failures can typically be corrected by a running a Table Integrity. Because of the structure of the Bar|Scan software, there is a minimal chance of corrupting data during a system failure.

Describe how security control is implemented in your system. Which features are provided by the operating system and which are application software features?

Bar|Scan has password protection which controls database, menu access fields, and functions within the system.

Bar|Scan's password system can restrict the above functions within each menu, as required. For example, one user can have the ability to Set and View Catalogs; Add, Change, Delete and View Assets, but not access the serial number field. Another user could Set, Add, Change, and View Catalogs, Set and View Assets, and have no access to the reports' menu.

All users require full read/write and modify windows permissions allowing access to all Bar|Scan directories and files.

Setup requirements are that there is one program directory and separate subdirectories for each distinct asset database. There are no special login script requirements. Users need full access to all folders.

Describe the audit trail of database changes available on-line and/or printed. How long is the audit trail maintained?

The Activity Log Interface creates a history of activity, behind the scenes, in Bar|Scan for export to your enterprise or accounting system. You can control what types of actions (add, delete, or change) and which fields will trigger an entry in the transaction log. The transaction log can be generated as frequently as desired. The output is a complete listing of the asset or other table records, in a variety of formats. Optional fields include, the type of action, and a time and date stamp. Format options include: Comma Delimited, Microsoft Excel, XML and CSV.

The Activity Log Interface stores the data indefinitely subject to disk space and archive procedures, which should occur on a regular basis. Bar|Scan has an Activity Log Archive function built in. The Activity Log table can also be printed using the Bar|Scan report generator.

Discuss the data dictionary provided by your system.

Bar|Scan does not contain a user-accessible data dictionary however, you can export it or print it. This is your actual data dictionary and will contain all of the modifications made by you to the database, e.g. the addition of User Defined Fields. If you have more than one company database, the data dictionary may be different for each company.

A sample report is included in Bar|Scan and can be found by selecting the ALL Reports Icon.

Additionally *Chapter 14 - Import and Export* of this manual includes a field length chart of fields, including their type and length.

What is the maximum number of concurrent users updating data?

There is no limit to the number of users updating data, but only one person can update any particular record at any given time.

What limitations should we be aware of before purchase of bar code asset labels?

The asset number length must be between 5 and 80 digits. The room tag length must be between 4 and 10 digits. The recommended symbology is code 3 of 9, and we recommend that the density be between 7 and 9 characters per inch. Two dimensional bar codes such as UID Construct 2 can be scanned and supported on the Mobile Devices that can capture 2D barcodes. Bar|Scan, Inc. would be happy to assist you in developing your specifications, at no charge.

I completed my annual inventory, how do I know what assets are missing?

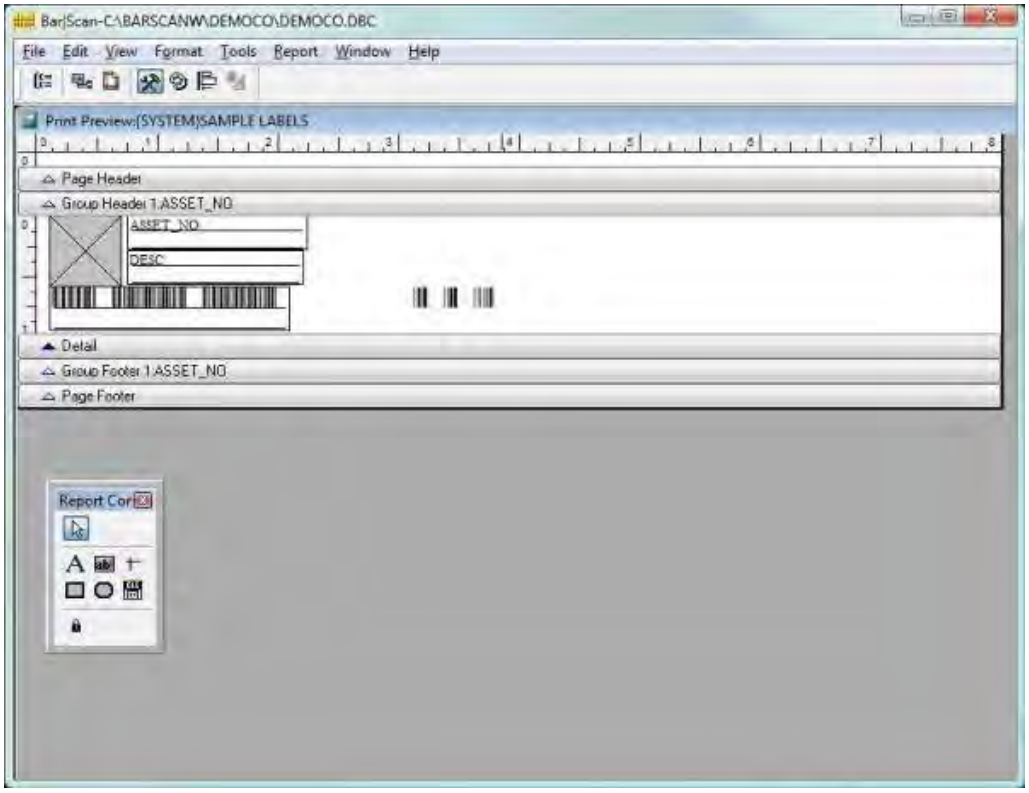
After your inventory is completed and all Transactions have been moved to the Asset Table, you can print a report (or create a SET command) to print all missing assets. This report would have a filter with all assets that have an inventory date OLDER than the first date of your annual inventory. These assets were not scanned during the annual inventory. These are your missing assets. You can also print a report of new assets only. New assets are those with no prior location.

How do I set up an ODBC connection to Bar|Scan?

The Knowledge Base section of our website discuss ODBC and OLE connectivity in detail.

Can I design my own label including a logo?

Yes, you can design your own label. A sample label is included in the Bar|Scan System reports. The Report name is "{System} Sample Labels". You can access the report designer by placing three exclamations in the beginning of the "Optional Format File" field like this !!!. You will still need to include the format file name. When you then select the Preview Button, the report designer will be displayed similar to the example below:



This feature is for more advanced users with some layout experience in other applications. You can also contact us if you would like us to create a label for you.

SYSTEM OVERVIEW

INTRODUCTION

Bar|Scan is a complete Asset Management System. As such, the system must:

✓ Precisely define or describe each different kind of asset

✓ Provide a way to identify each and every asset in your company

✓ Identify a current physical location for each asset - optional but very useful

✓ Provide a means to periodically take an inventory of the assets

✓ Provide the ability to efficiently maintain the information recorded for each asset

✓ Provide the ability to interface with other software systems by importing and exporting information or ODBC linking

✓ Provide many different printed or exported reports containing the desired information presented the way you want it

✓ Identify the individual and/or the organization having possession of, and/or responsibility for each asset

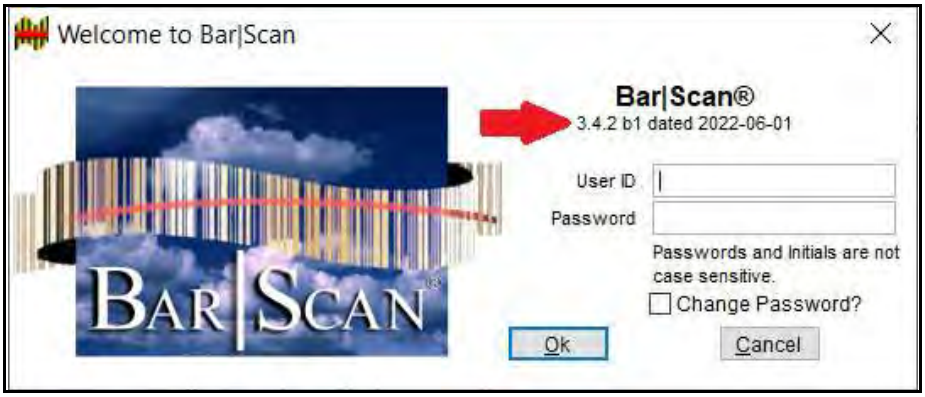
This chapter will show you the different features of Bar|Scan and provide information about the nature and purpose of each.

You will also be instructed about some of the ways to access and exit the different features.

If you have installed the Bar|Scan system, you may experiment with the different features in your sample database - ***Democo***. For instructions, see Chapter Nineteen, Training With Demo. Feel free to experiment with the Democo.

STARTING BAR|SCAN

Double click on the Bar|Scan icon, and if you are not using Single Sign On (SSO) you will see a window to welcome you to Bar|Scan as shown below.

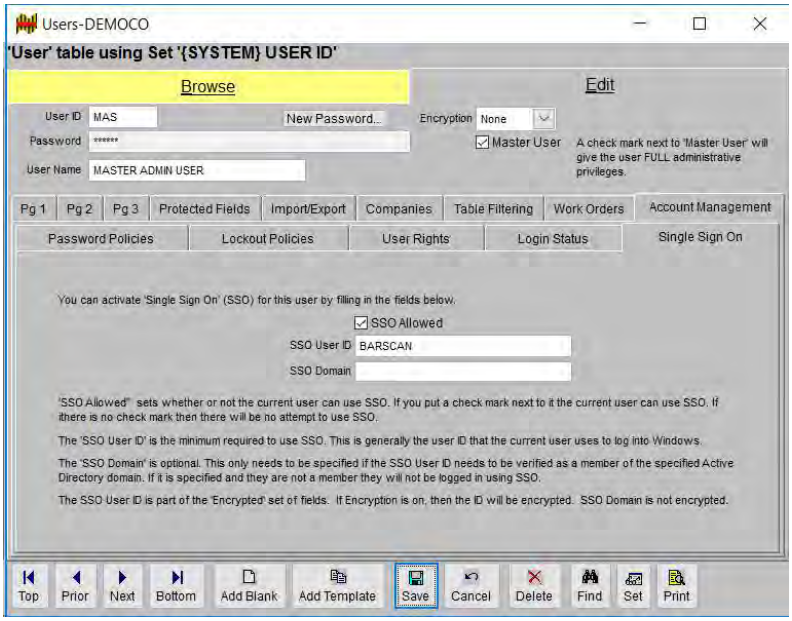


Please type your User ID and press <Enter>, then type your Password and press <Enter>. Then press <Enter> again, or click on the Ok button. You will then see the Bar|Scan Windows Main Menu.

If you have just installed your system, or if you have not been given your own User ID and Password by your Bar|Scan administrator, the default User ID is **MAS**, and the default Password is **MASTER**. Simply type MAS in the User ID field, and press the Enter key. The User ID and Password is not case sensitive. Type MASTER in the Password field, and then press the Enter key. Then select the OK button by pressing Enter again, or click on it with your mouse.

Note: The software version number for the software is listed at the top of this screen, as well as on the Help drop down menu, under About Bar|Scan for Windows.

You can bypass the Welcome Screen by optionally using the Single Sign On feature. Using Bar|Scan Single Sign On (SSO), the Bar|Scan Login is replaced with your current authenticated Windows or Active Directory account.



Single Sign On (or SSO) implementation is via an addition to the User Screen under ‘Account Management’. Within this screen are three fields. Field “SSO Allowed” enables/disables the function for the current user of the screen., “SSO User ID” is basically the Windows User ID used to log in to Windows, and “SSO Domain” is the Active Directory Domain of the user.

For SSO to be active, both the ‘SSO Allowed” must be checked ‘on’ and the ‘SSO User ID’ field must be filled in with the user’s id. The ‘SSO Domain’ name is optional. It is only needed if managements wants to specify that this particular user must also be a member of the specified Active Directory Domain.

When a user logs into Windows, Windows makes available the current user name to requesting programs such as Bar|Scan. If Active Directory is being used, the User will not be allowed to log in to Windows unless they are using a permitted Active Directory user id. After the user has logged into Windows and has been authenticated by Active Directory, Bar|Scan will be available. When Bar|Scan is started by a user Bar|Scan obtains the current user Id from Windows and compares

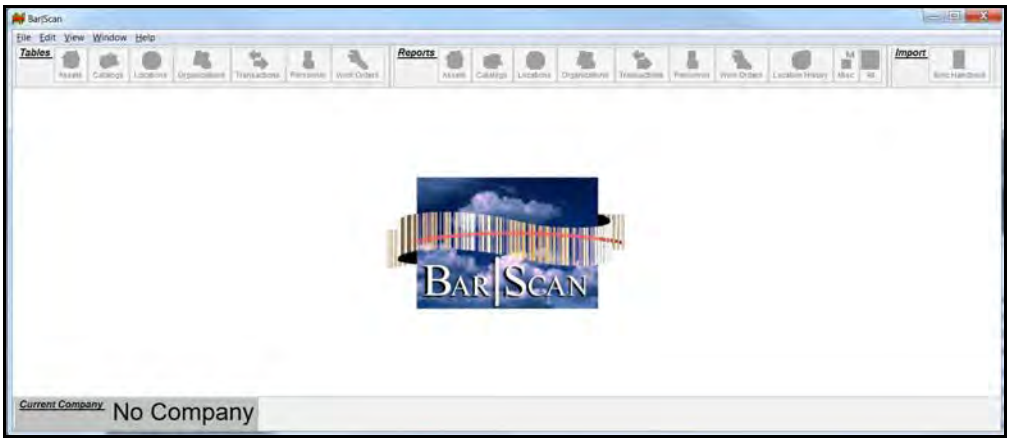
it to its user table entries. If a matching ID is not found, the user is not automatically logged in. If a matching ID is found within Bar|Scan, then the login process continues with that specific user. If an Active Directory Domain is also entered for the user within Bar|Scan, then Bar|Scan calls Active Directory through an API to check to see if the ID is in the specified domain. If it is not, then the user is not logged in. If it is, then the login process is completed and the user will never see the Bar|Scan login screen.

Although Bar|Scan can consult Active Directory when authenticating users (if the relevant fields are filled in) authorization for its many functions is currently too complex for Active Directory in its current version. Since proper authorization is obviously a requirement, management only within Active Directory is not possible at this time. Because of these authorization requirements, users added and removed from any Bar|Scan Active Directory domain will also have to be added or removed from within Bar|Scan's list of users. Bar|Scan itself manages authorization of its functions. In other words, authentication and authorization of Bar|Scan users is not possible within Active Directory alone but must be made in coordination with Bar|Scan.

Additionally, Bar|Scan does not import or accumulate a list of Active Directory users, but only checks the current user against Active Directory's authentication process.

THE BAR|SCAN MAIN MENU

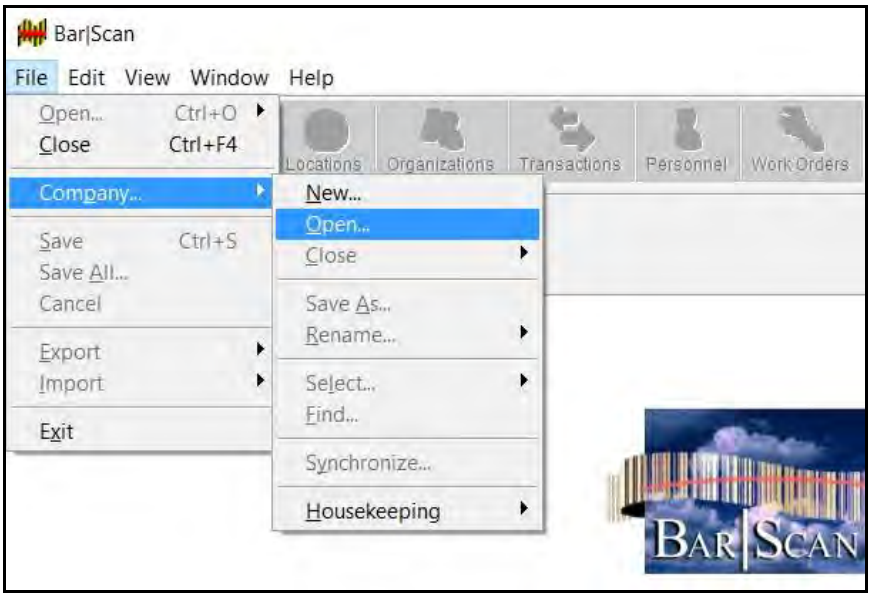
When you start Bar|Scan, you will be presented with the Main Menu as shown below.



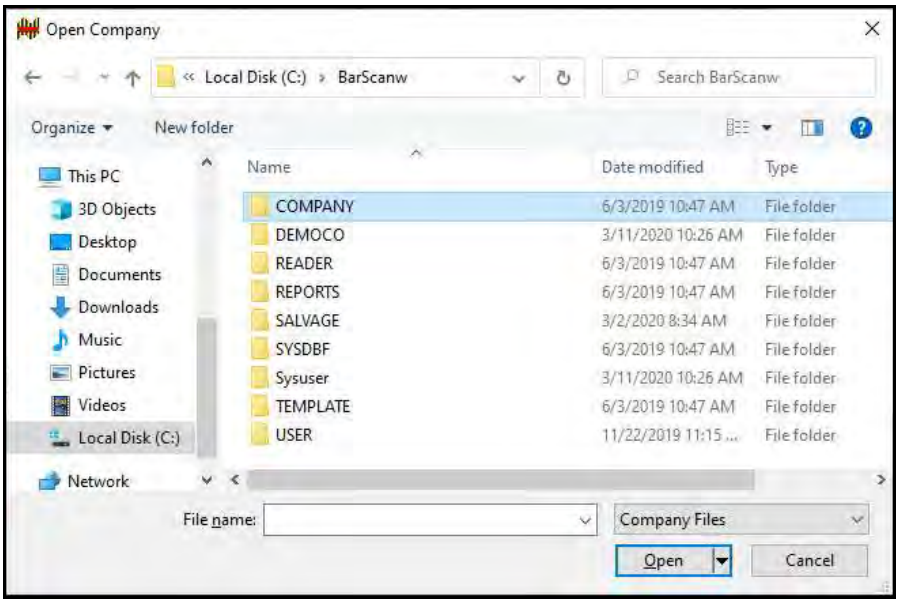
At the top of the window is a horizontal bar referred to as the Title Bar. The Title Bar as well as the Footer Bar at the bottom of the window will list what Company Asset Database you have open.

The first time Bar|Scan is started, no Company name will appear, as there will be no Company Asset Database open until you open it. As shown above, the icons will be greyed out as well.

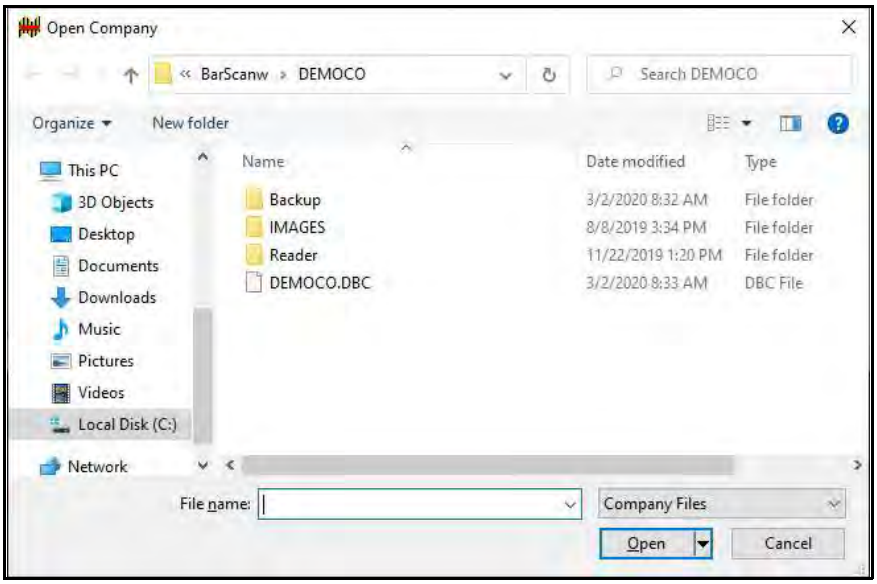
You can open a company database by saying File, Company ...▸, Open as shown below.



When you attempt to Open a company as shown above, you will be shown a new window that lists the databases that are in your Barscanw folder as shown below.



Select the Democo to practice and learn the features of this software without fear of ruining real data. Highlight the Democo and select the OK button, or double clicked on the Democo folder and you will be shown a window like the one below.



Highlight the Democo.dbc and select the OK button, or double click the Democo.dbc and the Demo database (called Democo) will open.

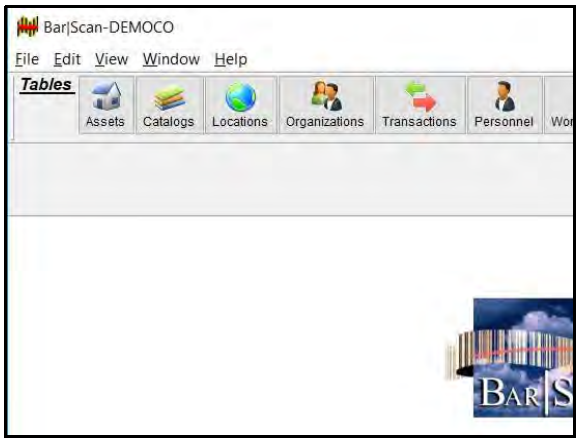
The Democo is a full working system containing sample information. The Democo will enable you to do the same things you can do with a live system. Learning on the Democo allows you to familiarize yourself with the features, without the fear of creating problems. You can: add, change, set, delete, or print information. All of the features perform exactly as they will when you enter your real database.

We urge you to work with the Democo. Try all of the different features using the Training With Demo Chapter of this User Manual. Use the company and data until you are comfortable with all of the features.

Note: If you have a single company version of Bar|Scan, and you want to start a new company, select File, Company ...▸, Close, All. When ready, you can select File, Company ...▸, Open and select the Company folder, and the Company database inside of it. You will begin by changing the Settings in this company to match the specifications for your new company.

We recommend working with the Democo, until you are familiar with the features of the Bar|Scan program.

Immediately below the Title bar, the Feature Categories are listed as shown below. These Feature Categories allow you to access all of the primary features of Bar|Scan.



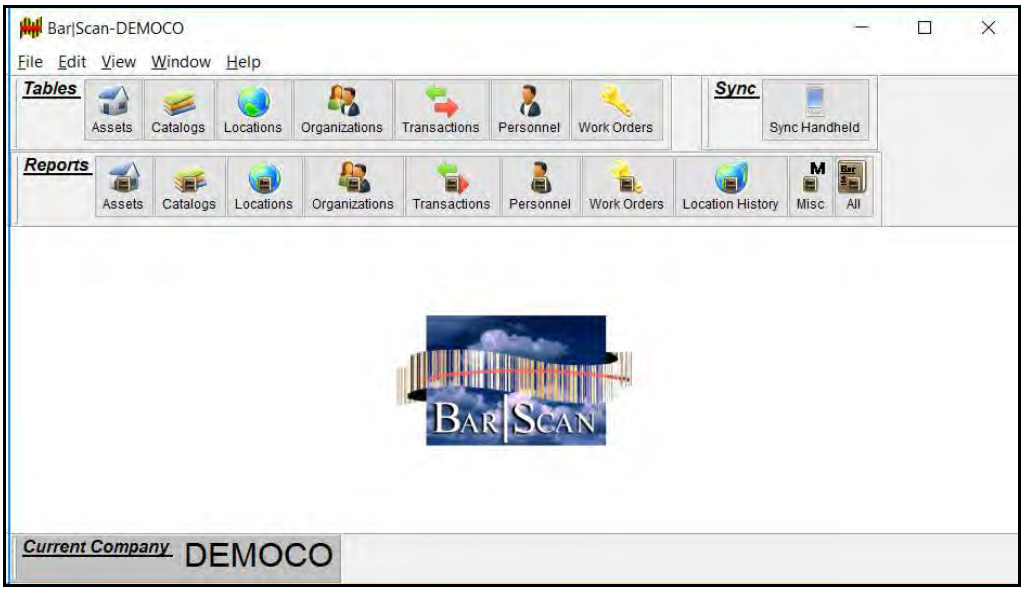
As with most Windows compatible programs, simply click on the desired Feature Category, and a drop down menu will appear, listing the Features.

When you select File, you will see a drop down menu. You can select any of the Features that are highlighted, such as Open, Company, or Exit. Some of the Features have additional menus that will appear when that Feature is highlighted signified by an arrow (...▸) located to the right of the Feature, i.e., select File, then Open ...▸, then Asset ...▸, Assets.

THE MAIN MENU CHANGES

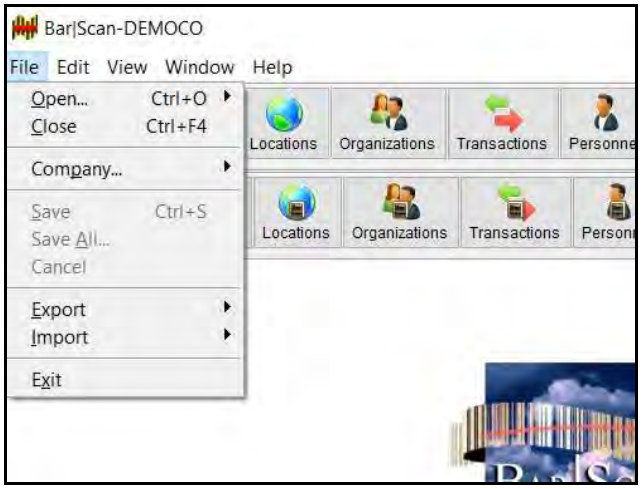
When you open any panel or table, the Main Menu changes to accommodate additional information on it. If you left click on the title bar of a panel, and hold the mouse button down, you can drag the panel to a new location, or click on the minus sign at the top right to minimize the panel, allowing you to view anything that was behind it.

When you open a panel, you can left click on the title bar, and move it out of the way, so that you could view the Main Menu. If you do this, the Main Menu will look slightly different, as shown below.



THE FILE DROP DOWN MENU

You can access each of the Feature Categories' drop down menu by pressing the Alt key + the underlined letter, i.e., to access the File drop down menu, you can type Alt + F, or by left clicking on the Feature with your mouse. When you select the Feature Category, File, you will see a drop down menu like the one below.



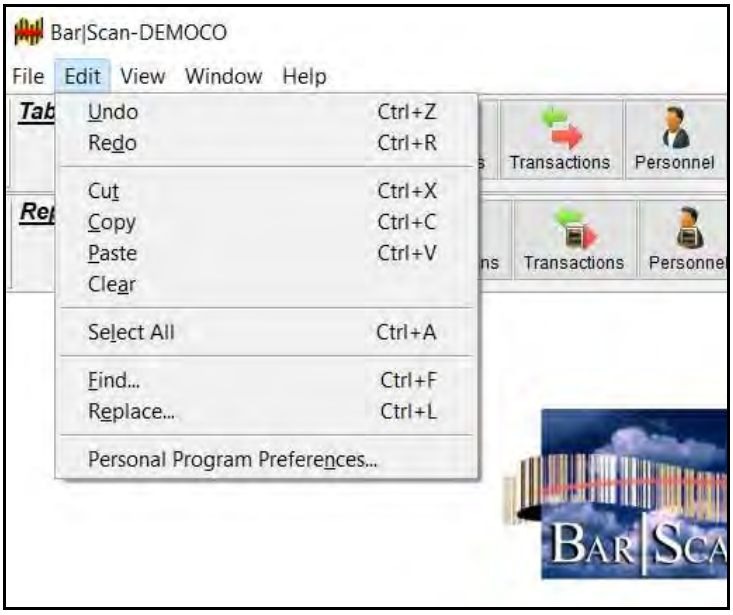
You can access any of the items on a drop down menu by left clicking on that item, or by typing the underlined letter, once the drop down menu has been displayed.

The Feature Category: File, is used in order to open any company or table, as well as to close them, Save, Cancel, Export, Import, and to exit the program.

Notice that to the right of some of the items on the drop down menu, there are either arrows or keystrokes listed. If there is an arrow, there are more items to view that will appear when you select that feature. If there is a keystroke listed, such as Ctrl+S for Save, you can access the Save feature by typing the Control + S key combination. Some of the items from various pull down menus may appear as "greyed out," or all light grey in color. This means that you do not have access to these items. This can happen for several reasons, i.e., it may not be applicable at this time or it may be an optional feature that your company has not purchased.

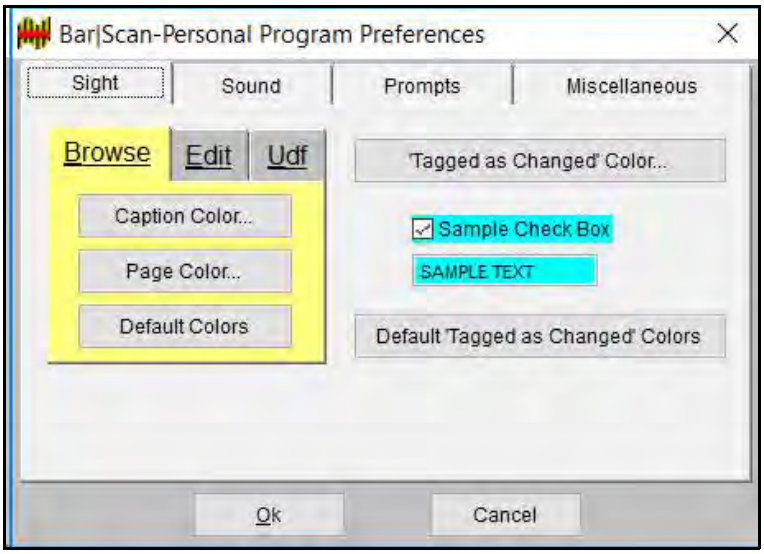
THE EDIT DROP DOWN MENU

The Edit drop down menu lists standard Edit items, as shown below.



You may Undo, Redo, Cut, Copy, Paste, Clear, Select All, Find, Replace, and set your Personal Program Preferences. Some of these items are listed specifically for text edits, such as the find and replace features. These items work on text, such as in the notes field.

When you select the last item on the Edit drop down menu, Personal Program Preferences, you will see a table like the one shown below.



Just like it sounds, you can list your personal preferences for the items on this table, or use the defaulted options.

On the Sight tab, you can choose different colors for the Bar|Scan program.

On the Sounds tab, you can select sounds and when they are made, for instance if you want a beep to play

On the Prompts tab, you may decide which prompts you want to have verified before the action is carried out.

On the Miscellaneous tab, you can choose if you want the entire directory path displayed on the title bar instead of just the company name.

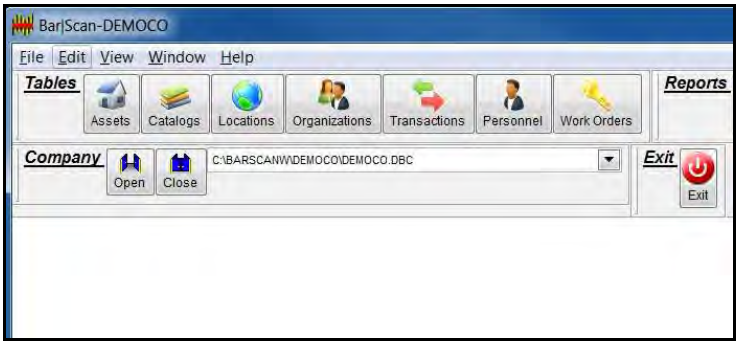
THE VIEW DROP DOWN MENU

The View drop down menu is shown below.

This feature allows you to add shortcut icons, with or without captions, to your Main Menu.

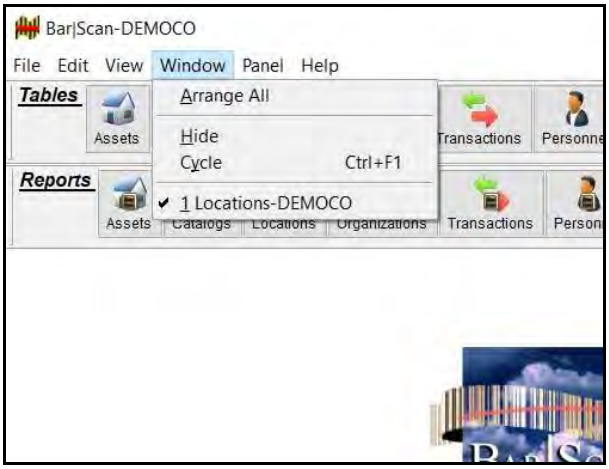
You can add shortcut icons to open Companies, Reports, Tables, or to access the Import feature. There are additional items listed here that allow you to turn this feature off, or to add all of the icons to your Main Menu.

If you are consistently opening reports, for example, adding the Report Toolbar to your Main Menu will allow you to access the different types of reports by simply clicking on their corresponding icon(s). The icons that are available to you are shown below. Placing your mouse pointer on each icon, without depressing your mouse button, will make the program display a short description of that item.



THE WINDOW DROP DOWN MENU

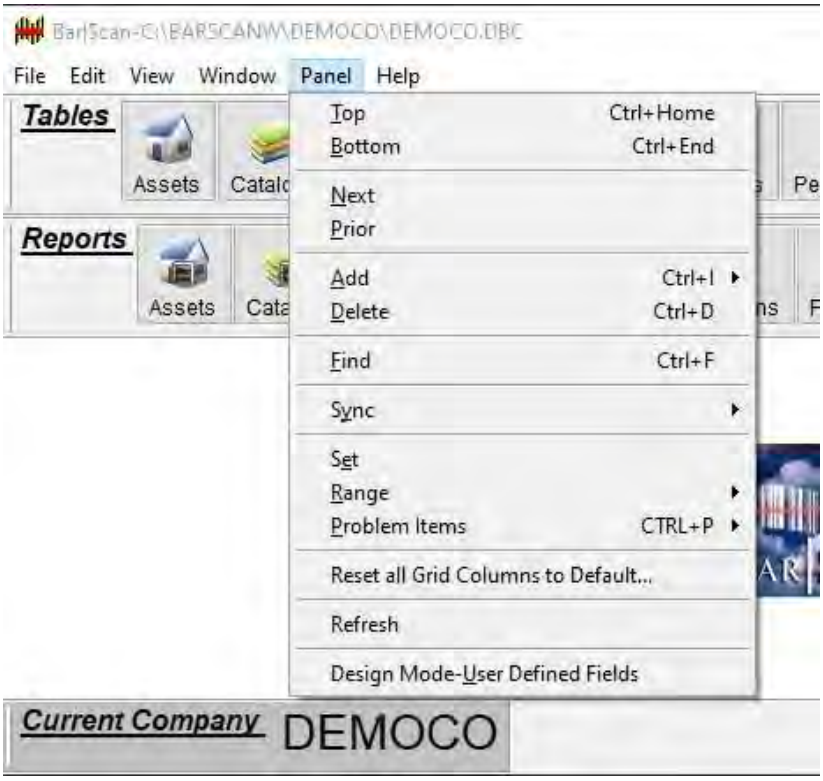
The Window drop down menu is shown below.



This item allows you to arrange all of the Bar|Scan windows that you have open. You can hide the window, hide all of them, or Cycle through them. Cycle allows you to bring to the front any window that you have open, making it the active window. If you have several windows open, cycle will bring them to the front in order. The bottom item(s) list the table(s) that you currently have open. As shown above, for illustration purposes, we had only one table, the Location table from the Democo company open.

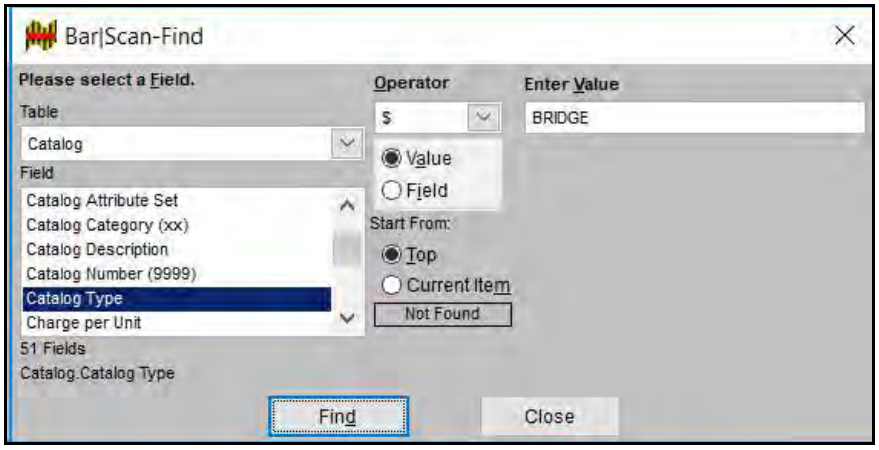
THE PANEL DROP DOWN MENU

The Panel drop down menu is shown below.



These features are directly related to the panel that you have open and active. Top, allows you to go to the first item, Bottom, allows you to go to the last item. Next and Prior items allow you to access the item that is next or the preceding item. Add allows you to add an item. Delete allows you to delete a selected item. Find allows you to find an item an item meeting criteria that you specify. Set allows you to sort the items by any of the sorts that have been previously created. Range allows you to start a range, end a range, or clear any or all ranges. Refresh allows you to refresh the current panel. Design Mode-User Defined Fields is used when you have the UDF module, to launch the design mode for adding or editing your User Defined Fields.

When you select the Find feature, from the Panel drop down menu, you will be shown a panel like the one below.



The items listed in the above window will change to reflect the panel that you have open and active. For example, if you have the Location table open and active, and you select the find feature, the items listed on your find panel will be location fields.

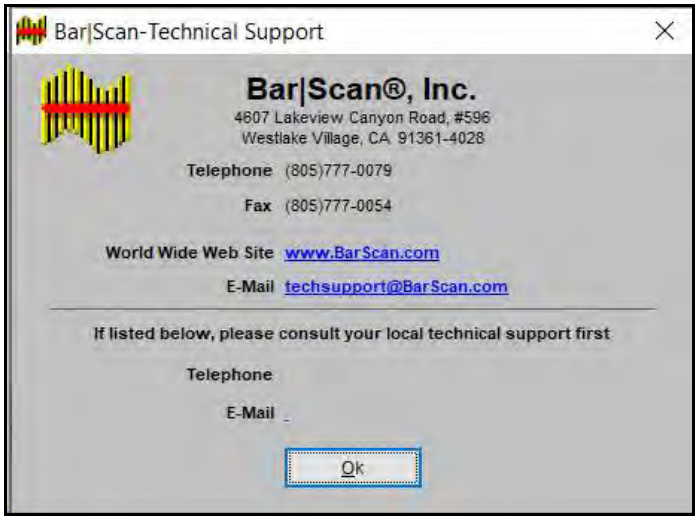
To use this feature, first select a table, then simply choose a field you wish to locate. Next, select an Operator, i.e., greater than, or equal to, and then choose a Value. In the above panel, we are searching in the Catalog Table for the first catalog that has a Catalog Type that contains the word "BRIDGE." You can start the find feature from the Current item highlighted on your active panel, or from the top.

Click on the Find button, and the highlight bar on your active panel will move to the first item that matches the criteria. When an item that does match the criteria is found, the Find button on the Find panel switches to say Find Again. If Bar|Scan does not find a match, you will be notified by a Not Found message being displayed above the Find button, as shown above.

THE HELP DROP DOWN MENU

The Help drop down menu is shown below.

The third item in the Help drop down menu, is Technical Support. When you select this item, you will see a window similar to the one below.



This item displays information about Bar|Scan, Inc. The US address, telephone, fax, website address and email are listed here.

You can click on the website address to open your Internet Browser and be directed to the Bar|Scan website.

Clicking on the email address will open your email program and begin a new email for tech support.

Optionally, using a text editor, your IT Department can add their contact information into the text file \barscanw\sysdbf\bsglobal.xml and it will be displayed in the panel shown above.

The last item on the Help drop down is About Bar|Scan for Windows. When you select this item, you will see a dialog box like the one listed below.

This item will display information about the Bar|Scan system that you have on your computer.

Toward the top, immediately to the right of the word Bar|Scan, the Version number is listed, as above it appears as v3.4.2 2022-09-27 (YYYY/MM/DD) format in US - other formats by County). The version number is also listed on the sign on screen.

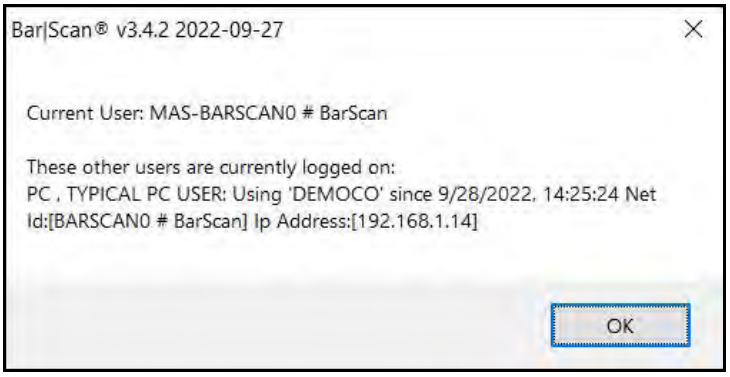
Next, it lists whom the product is licensed to, and if the license if for a Single User or Multiuser (LAN) system. It lists the current user, and the company path. It then lists the different items that are available when the system is purchased, and check marks are placed in the items that are currently on your computer.

If you are using the bsyspath.bini file to maintain a local copy of the Bar|Scan application files (for networks with speed issues), and you launch the local copy, then the System Base Path will display the word 'Redirected' at the end of the network path.

If not then 'Exe path' will be displayed.

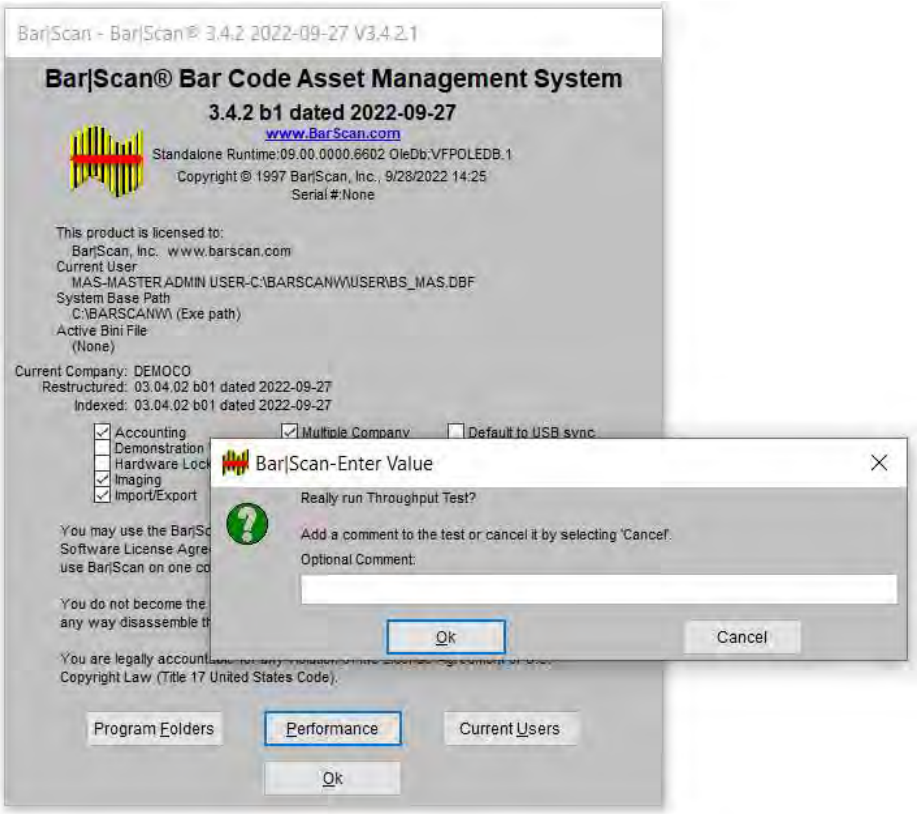
The left button 'Program Folders' provides information for technical support.

The last item listed on the bottom right of this window, is Current Users. This feature allows those with a Multiuser system to view who is logged into Bar|Scan at any given time. A sample is displayed below.



When you are finished viewing the information, simply press the Ok button, and the window will disappear.

The center button 'Performance' provides information for technical support. The Throughput test should be performed in coordination with Bar|Scan technical support. There are settings that should be turned on prior to the test.

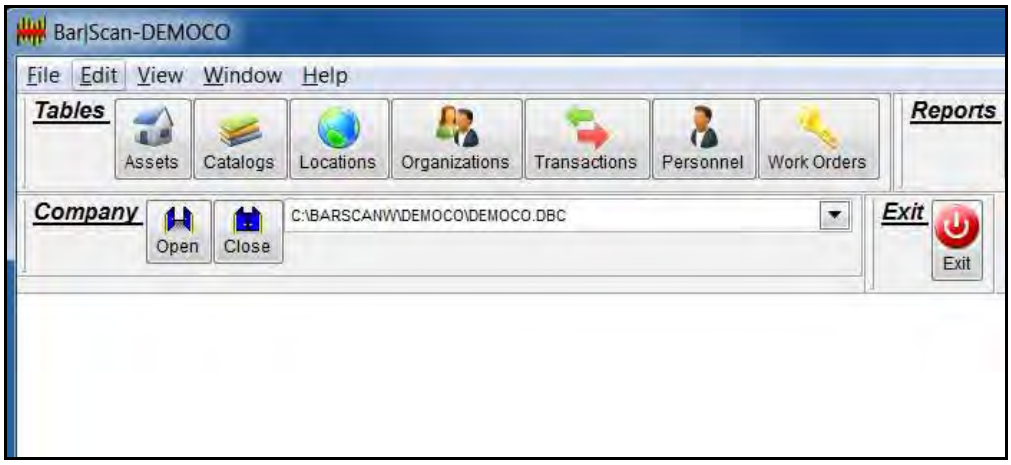


Bar|Scan, Inc. maintains a *Knowledge Base* section on our website to address specific operational issues in a question and answer format. The page is accessible from the Support tab located on our main page www.barscan.com

Use Throughput as your Knowledge Base key word or contact us.

OPENING A TABLE

When on the Main Menu, you can select any table. When you wish to see the assets that are listed in your system, simply choose the File (Feature Category), then Open ...▸ (Feature), then *Asset* ...▸, then Assets as shown below.

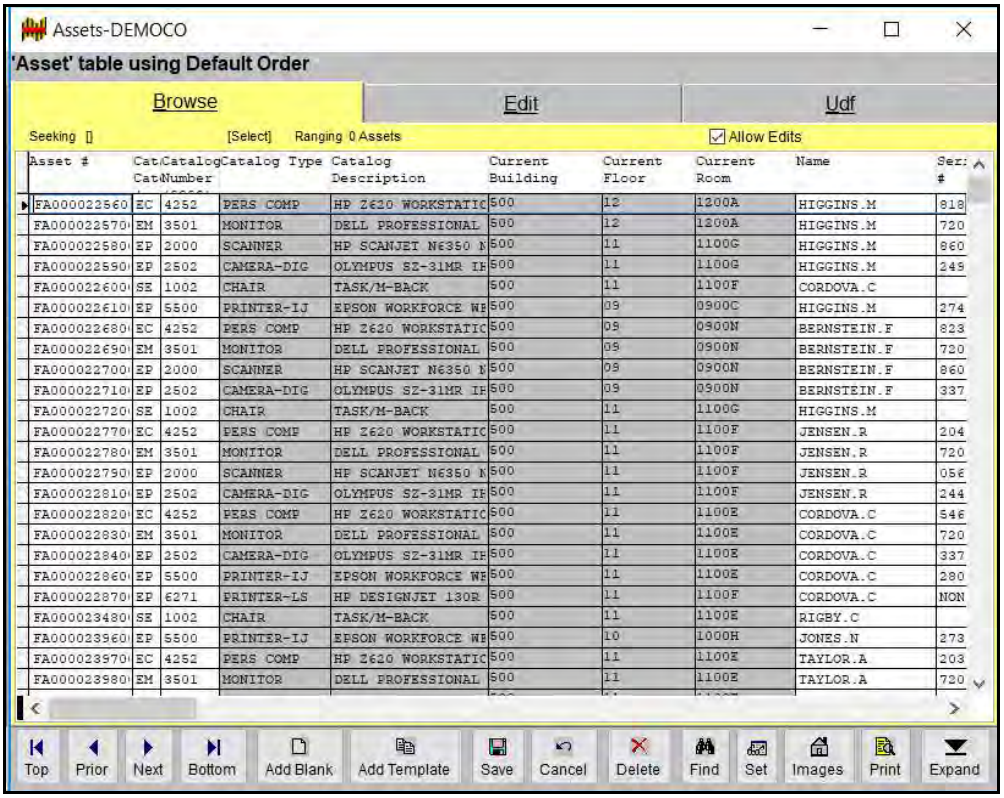


Alternatively, you may click on the Asset icon, and the Asset table will open.

Recall that you can add or remove the icon names by selecting the View Menu and selecting to view with or without captions.

THE TABLES

When you have selected File, Open ...▸ Assets ...▸ Assets from the Main Menu, or, if you have clicked on the Asset icon, the Asset table will appear. It will be similar to the one shown below.



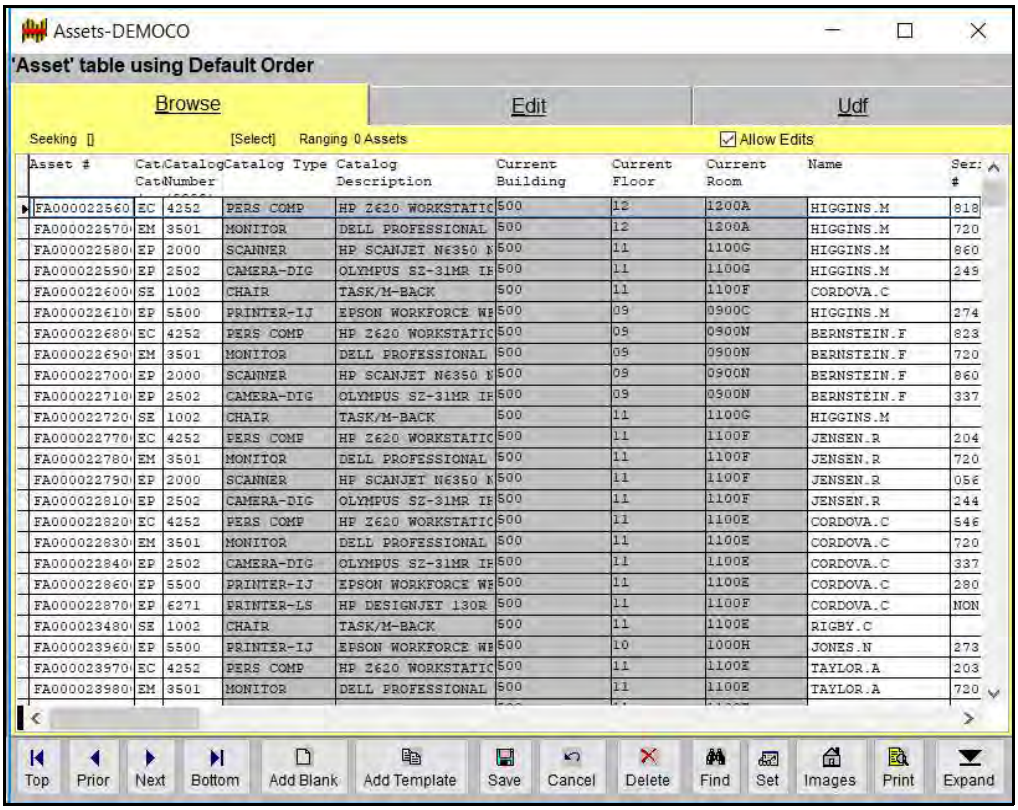
If you have selected the Table Tool Bar to display under the View feature, then you can simply select the Assets icon to open the above table. The icon is shown below.

THE BROWSE AND EDIT TABS

There are two main tabs at the top of this screen, the Browse and the Edit tabs. The Browse tab is selected by default. This tab is used to view the list of items from the table you have selected. You will also want to use the Range feature on this tab, selecting the items for your range(s) here.

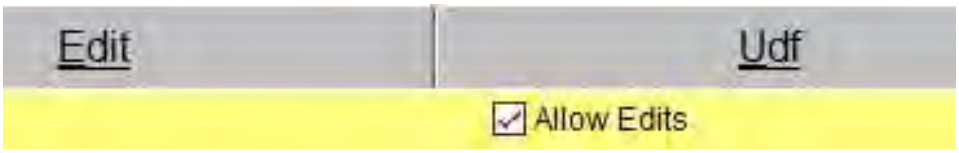
On the Asset table that is shown, there is a third tab, the UDF tab. This item will only appear if you have the optional User Definable Fields module, and have added at least one field to that particular table.

The Browse tab displays a list of items that are in your system. Use the scroll bar to scroll through this list. You may also type the first character of the item you wish to view to help expedite your task.

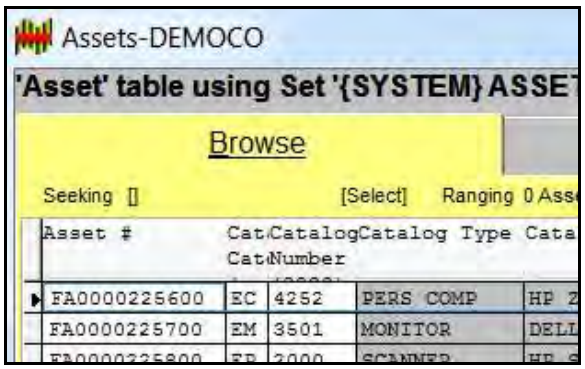


Allow Edits

The browse tab allows you to view all of the items in a particular table listed one under the other. The Set feature allows you to sort the items on the browse panel by any field contained in the table. So, you can sort the items on the browse panel to view the different fields, and look for items that may need editing. As shown below in the partial panel, there is a field called Allow Edits.



If you left click on the box next to this field, you can make edits while still on the Browse tab. In some cases, this may be faster and easier than going to the Edit tab. Let us say, for instance, that during an audit, you noticed that the Serial Number for the keyboard listed last on the partial panel below, had been incorrectly entered. You could place a check mark in the Allow Edits box, as shown below, and correct this error without ever going on to the Edit tab.

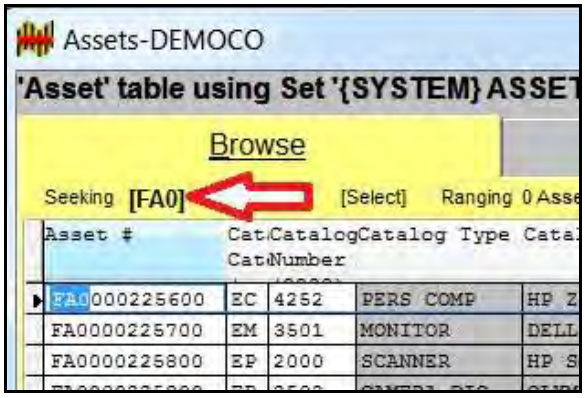


After you have made your edit(s), you will need to Save or cancel your edits before you can exit this panel. The Allow Edits box is listed on all Browse tabs, and works in a similar manner for each table.

Note: Allow Edits will not allow you to make changes to the first column.

Seeking

As well as allowing edits, the top of each browse panel has another very useful item, Seeking, as shown below.



Seeking allows you to type, and have the system go to the item you type, if it finds it. For instance, FA0 was typed above. The system will find the first "F" and display it. Then, the system will find the first "FA" and will display it. Then, if you continue to type, you will be shown the first item that matches what you type. What you type is shown is displayed by the word Seeking.

You have to be in the first position of the first column for this to work, in our example that would be before the letter F. For every character that was matched, the highlight bar (dark blue) covers the items that it found that match.

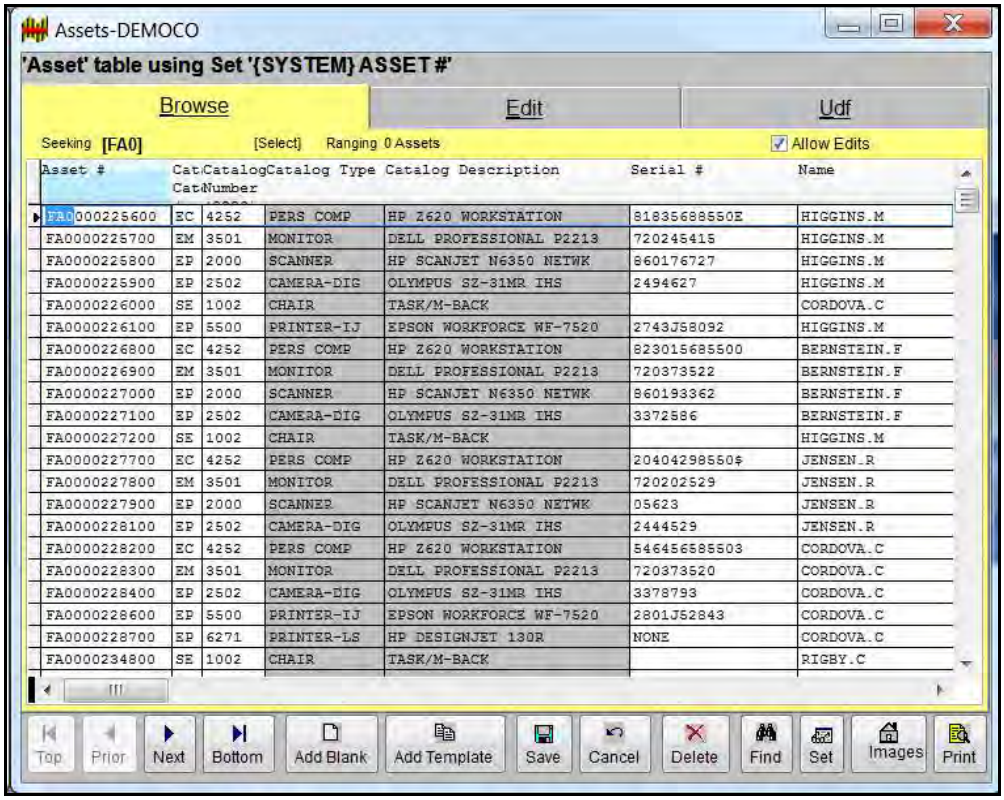
Important: If you have moved the highlight bar to the right by typing, the next time you try the seeking feature, you may think you are in the first position when in reality the highlight bar is somewhere to the right. If you are in the first column and you type, and the system can not find something that you know is in your column, use your left arrow to move the highlight bar back to the first position again.

Note: If you have sound on your computer, you can force Bar|Scan to make an audible noise when it does not find an item that matches in Personal Program Preferences under the Edit feature.

When you have selected the item(s), you wish to view in detail, select the Edit tab. You will see all of the information which has been recorded and entered for this particular item.

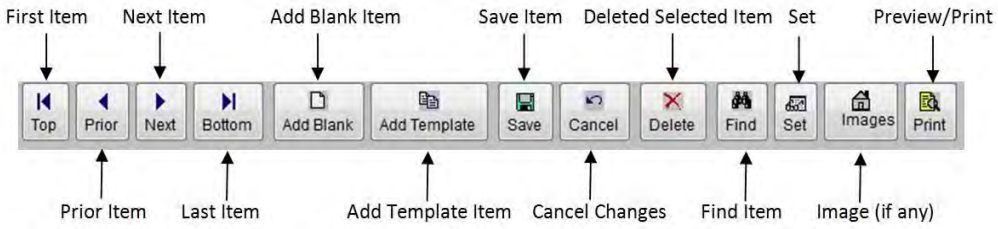
The table shown is the Asset table, but all of the tables work in a similar manner.

On the Edit tab, you may view all of the information listed in the table, and make edits when necessary.



The Tool Bar

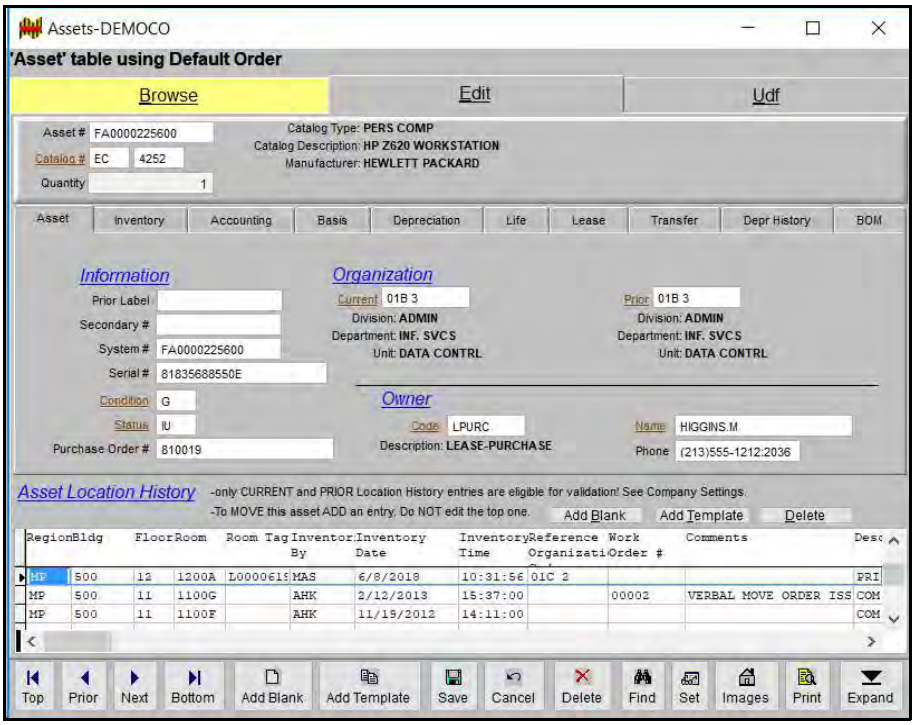
The Tool Bar located at the bottom of each Panel is pictured below.



This Tool Bar is shown on the bottom of all of the panels. But, a couple of the Panels have additional items in their Tool Bars, i.e., the Report Panel has a printer shown on its Tool Bar. Each item in the Tool Bars have a balloon description that will appear when you hold your mouse on top of it.

THE ASSET TABLE

The Asset's Edit Panel, shown when the Edit tab is chosen, has a few unique features.



The Edit Panel will provide you with all of the information that has been entered pertaining to the asset shown. This information will be broken up into groups. The available categories for these groups are represented by the nine tabs listed below.

The first two tabs, Asset and Inventory, are available to all users. The Asset tab is displayed by default. The rest of the tabs may be greyed out (not accessible) depending on the optional module(s) that your company has purchased.

The Asset's Edit Panel provides many features to assist you in finding and displaying particular assets or groups of assets. You can add new assets, change the information recorded for both an individual asset or a group of assets all at once, remove assets, or view the different assets.

We expect that the majority of the asset information will be initially entered into the system using the Mobile Computer (a much more automated process).

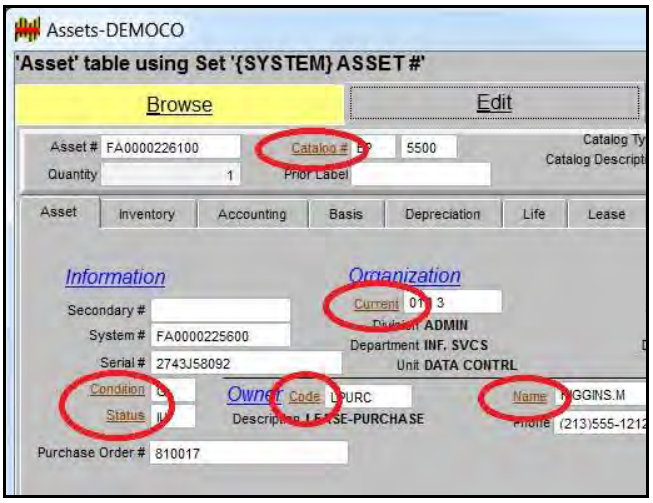
However, you will determine how additions, changes, and deletions will be handled, i.e., using the Mobile Computer or the Asset table.

To return to the Main Menu, use your mouse to click the X on the top right-hand side of the Asset Panel, or press the ESC key. Note, if you have pending changes or additions, you will be prompted to save or cancel them first.

Hyper Links

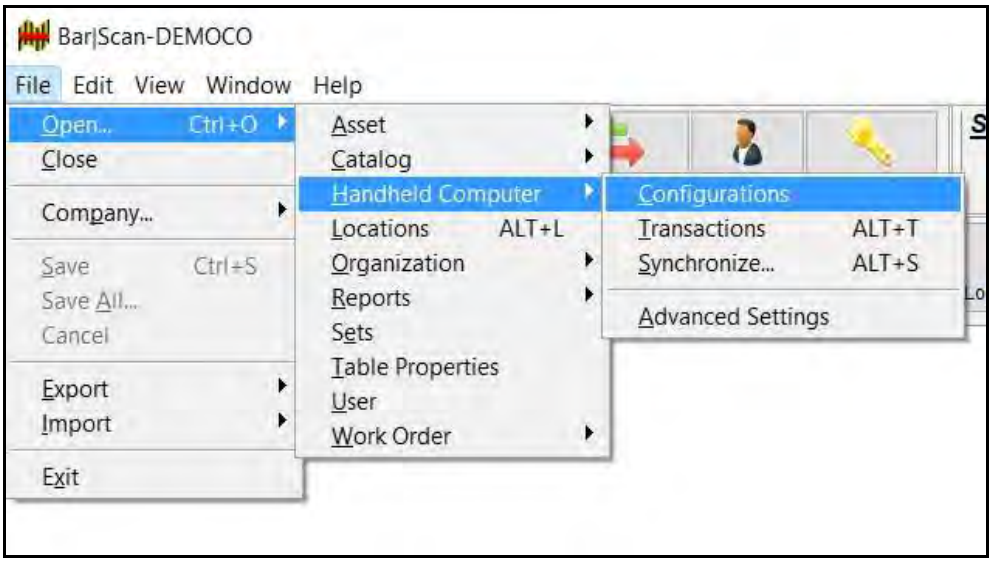
On the Asset table, as well as most of the other tables in your Bar|Scan system, there are red words that are underlined. These are called hyper links. They are mouse sensitive areas you can access to jump from the page you are on, to the topic that is underlined. These areas are linked, so that you do not have to manually go to the other table.

When you left click on the underline of the hyperlink, the item that was above the underline can be viewed and/or edited. Asset Table Hyper Links are shown.



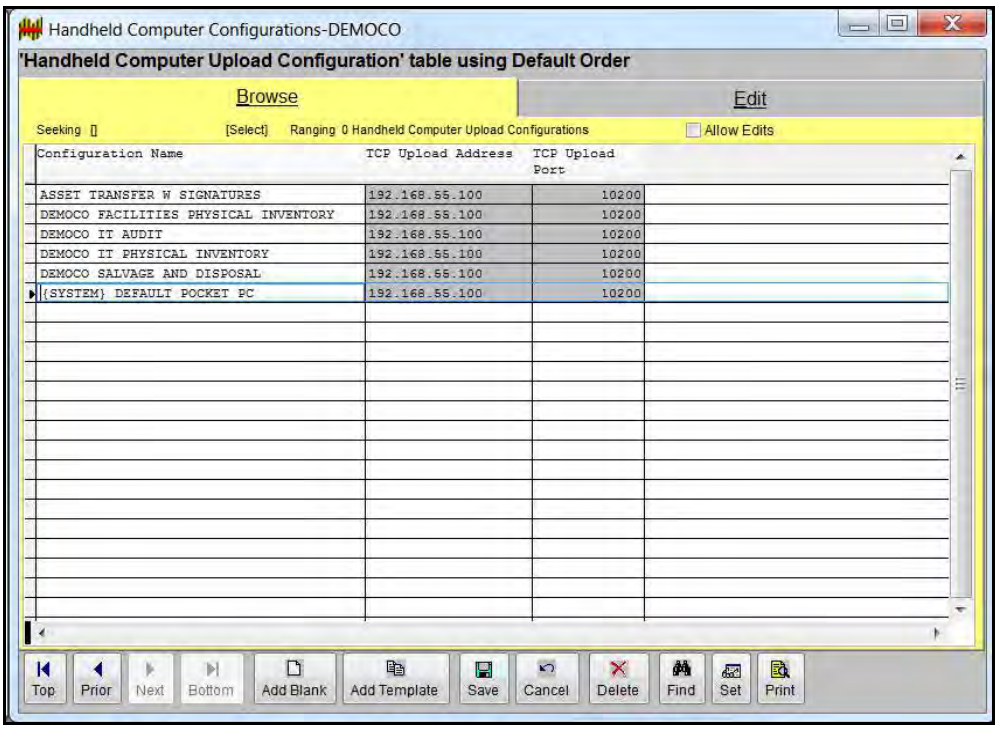
BAR|SCAN MOBILE APPLICATION

Information recorded with the Mobile Device is transferred to the computer with this feature. When you want to synchronize your Mobile Device, Change the Settings for your Communications, or add, change, view, or delete Transactions, you will want to select Mobile Computer on the Main Menu. From the Main Menu, select File, then Open ...▸, Handheld Computer...▸, followed by your choice of Configurations, Transactions, Synchronize or Advanced Settings as shown below.



Mobile Device Configurations

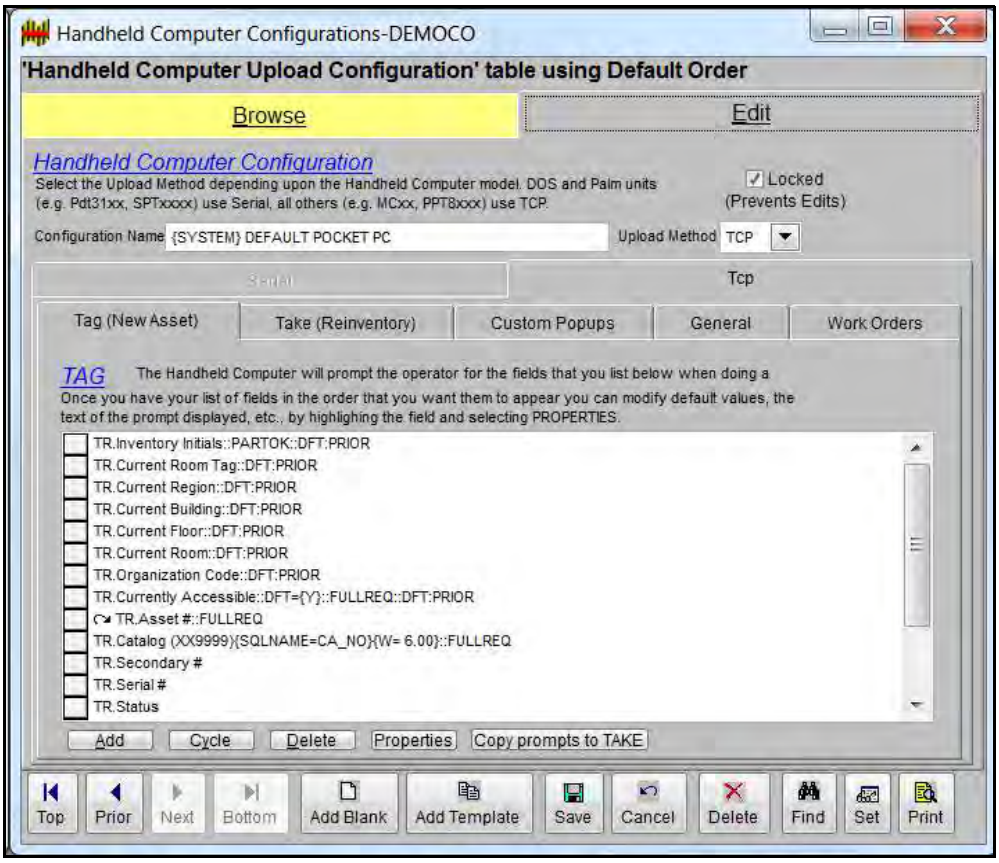
From the Main Menu, select File ...▸, then Open ...▸, Handheld Computer...▸, Configurations, you will be shown the following Browse panel.



Make your selection according to the type of Mobile Device that you will be using, and whether you will be using a USB cable, wi-fi, cellular service or an email for your upload.

When you select the type of communication that you need to configure, and select the Edit tab, you will see the following Edit panel for **TCP** (transmission control protocol) communication.

This Edit panel will allow you to select options for the upload of your Mobile Device. The defaults for the items are selected for you, but this feature allows you to change the Computer's Communication settings if you have special communications needs.

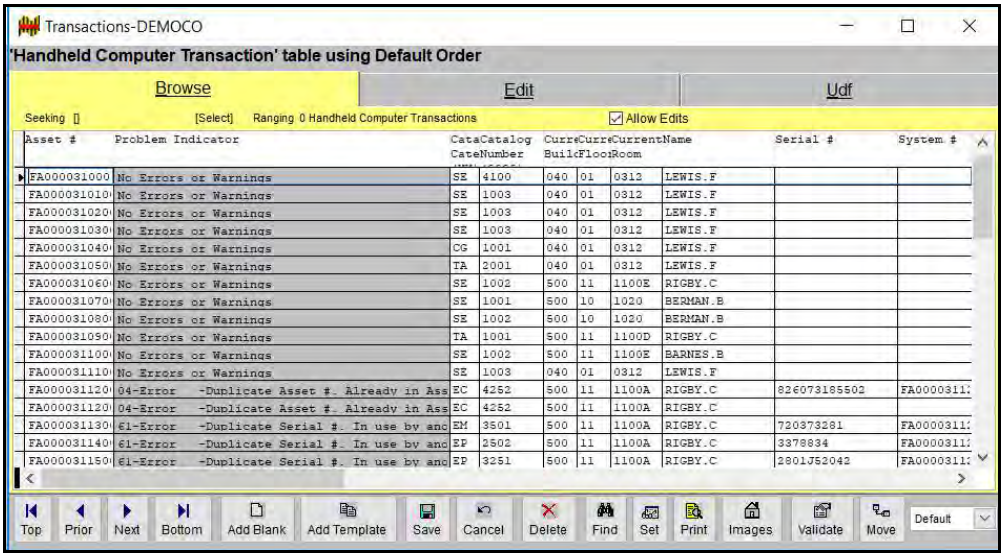


The communication settings for the TCP and old legacy serial and connection are independent from each other and are changed separately.

Mobile Device Transactions

When information is transferred from the Mobile Device to Bar|Scan on your desktop, it is put temporarily into the Transaction table, so it can be checked and corrected before being transferred into the Asset table.

From the Main Menu, select File, then Open ...▸, Mobile Computer ...▸, Transactions, you will see the Transaction Browse Panel as shown below.



This panel lists all of the Transactions that are found in your Transaction table.

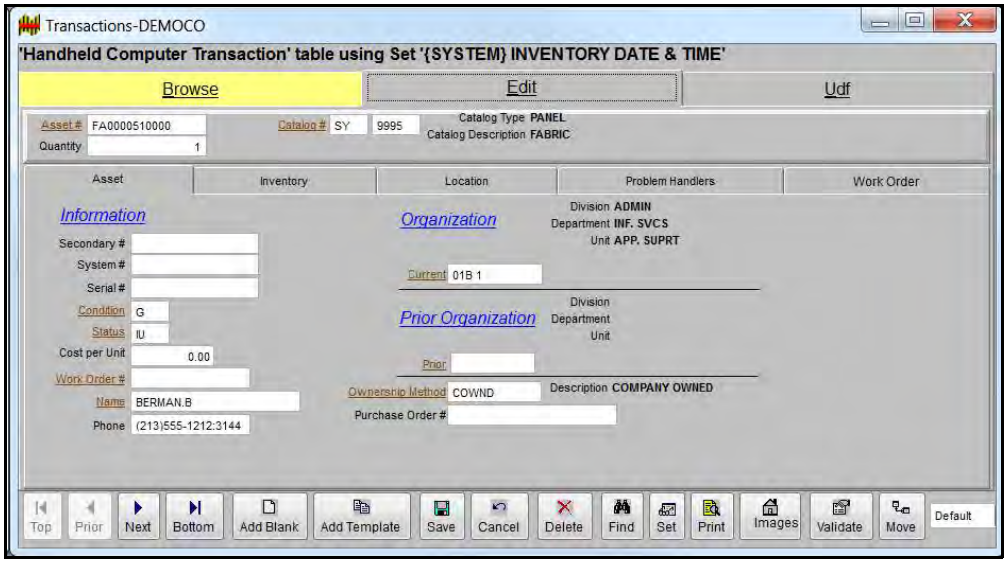
An alternative method to opening the Transaction table would be to click on the Transactions icon, if you have your Table ToolBar displayed. The icon is shown below.

Edit Transaction Tab

Bar|Scan does extensive error checking on the information in the Transaction table. When errors are found, messages are associated with the different asset records in the Transaction table.

This feature is used to correct problems with the asset records before they are transferred into the Bar|Scan Asset table. In addition, duplicate asset records can be removed and new asset records can be entered.

If you choose the Edit Tab, you will see the following panel which gives you access to all of the details that have been entered concerning your Transactions.



The Transaction table Edit tab contains five tabs of its own, unique to the Transaction table, as shown below.

Each tab contains additional information about your transactions.

In addition to the additional tabs, the Transaction table also has additional items on the tool bar.

The buttons illustrated above, are positioned on the Transaction tool bar as the last buttons on the right.

The first button shown here is for people that have the imaging module. This buttons will allow you to view the image that has been associated with the asset, catalog, signature capture or other images associated with a Transaction.

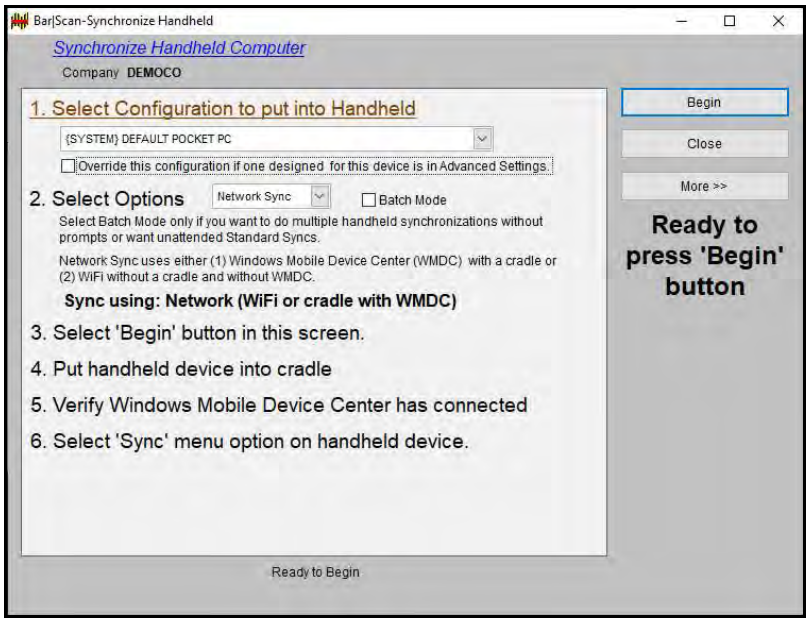
Sometimes, the image would be associated with the Catalog, as each Catalog represents a unique item. You may, however, have an instance in which you want the Catalog to be "generic," and show an image for each Asset that uses this Catalog. For example, if you have several paintings by the same artist, and their Catalog descriptions are identical, you may want to display an image of each Asset, and have all of the paintings use the same Catalog. Signature Captures for Transactions or Work Orders are also displayed as images

The next button is the Validate Selected Mobile Computer Transactions button. So, if you have the Transaction table open to the Browse tab, and you have used the F4 Range feature to range transactions, you can use this button to validate only those transactions which are part of your range. Or, if you do not have any transactions ranged, clicking on this button will validate all of the transactions.

The next button shown here, is the Move Selected Mobile Computer Transactions to the Asset File button. So, if you have the Transaction table open to the Browse tab, and you have used the F4 Range feature to range transactions, you can use this button to move only those selected transactions to the Asset table.

Mobile Device - Synchronize

This feature is used to prepare Bar|Scan to receive information and then record the information sent from the Mobile Device. From the Main Menu, select File, then Open ...▸, Handheld Computer ...▸, followed by Synchronize and you will see the following window.

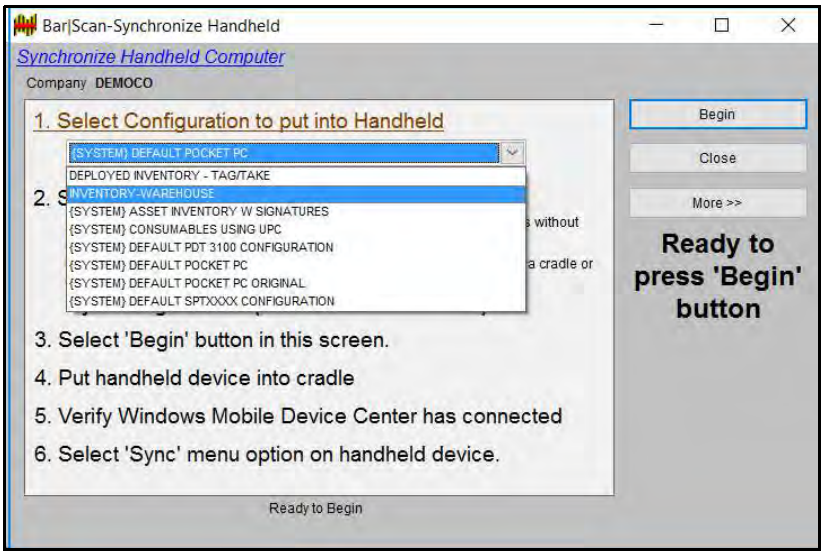


Alternatively, you can simply click on the Sync Handheld Computer icon if you have your Import ToolBar displayed.

Depending on your Mobile Device, the information can be sent either through a USB cable connected directly to the Mobile Device and the desktop computer, or remotely by using a Wi-Fi connection, cellular service or an email account.

There are 6 steps listed on the panel for beginning your first Configuration. Once you have completed these steps, Bar|Scan remembers your settings.

If you need to synch using a different configuration, or to select a different model of Mobile Device, select the down arrow next to the connection field, and you will see a drop down menu that lists more connection choices as shown in the next example.



For more information, see the instructions in *Chapter 11, Bar|Scan Mobile*.

Print Transaction Table

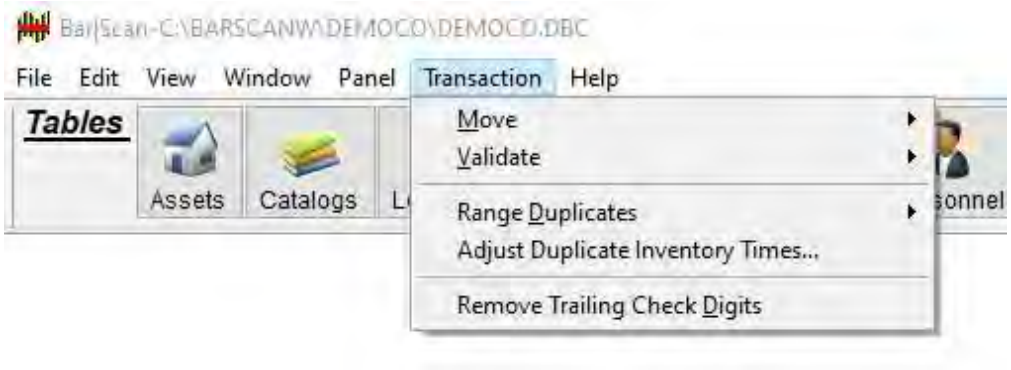
Before you can move any of the Transactions to the Asset table, you will be required to print a report showing the asset records which have been transferred. This report serves as an *audit trail* for the new entries.

The report is also used to assist in correcting any errors occurring in the transferred information. This feature is accessed as part of the Reports table, under Transaction Reports.

Note: You should validate all Transactions before printing them for the first time, and validate again after any changes you make.

The Transaction Feature

When you open the Transaction table, and have it highlighted as the current table, the word Transaction will appear as an additional Feature on the Main Menu. This feature is illustrated below.

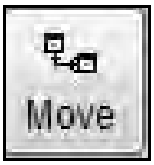


When you click on the word, Transaction, you will see a drop down menu as illustrated above. This drop down menu will allow you to use several additional items: Move, Validate, Range Duplicates, Adjust Duplicate Inventory Times, and Remove Trailing Check Digits.

Move (All or Selected Transactions)

Once an asset record has been validated for accuracy, the errors have been corrected, and the information appears on a Transaction Report, it is ready to be moved into the Bar|Scan Asset table. This feature only moves the good (and printed) asset records into the Bar|Scan Asset table.

You may select either Move All (good transactions) or Move Selected (good transactions).



To select only some of your transactions: select a Range of transactions while on the Browse Tab of the Transaction table, and then choose the Move Selected good transactions option as shown above.

Once this feature has been selected, Bar|Scan will gather the information on the transactions, and you will be shown a window that will allow you to start the move process by selecting Begin.

Validate (All or Selected Transactions)

Bar|Scan does extensive error checking on the information in the Transaction table. Validation is the term used for this error checking process. When errors are found, messages of each error type are associated with their corresponding records in the Transaction table.

This feature performs the actual validation, and if any errors are found, messages will be placed as part of the actual transaction, under the Problem Handlers tab.

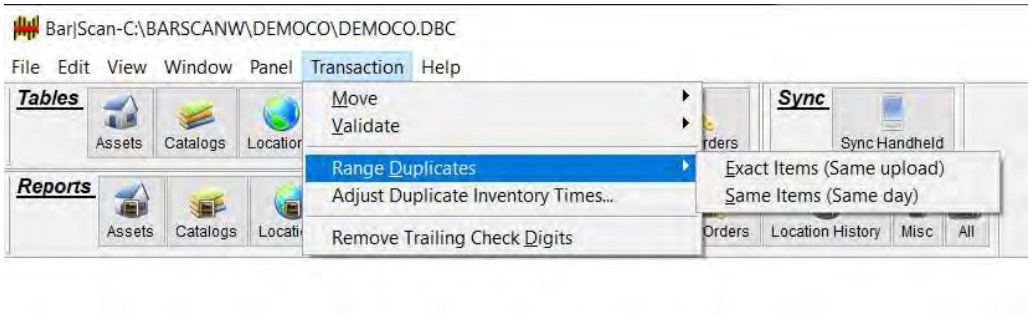
You may need to validate the same transaction more than once, and you should validate the Transactions after you have made all edits. Once an asset record has been validated, all of the errors must be corrected. The easiest way to view these errors, is to print a Transaction Report showing all of the "Bad" transactions, with the actual error message(s) printed on the report. Then, you may use this report to determine what changes need to be made, and make these changes in the computer.

Once the errors have been corrected, and the corrections have been saved, the transactions have to be validated again, then printed out as a Transaction Report again. When all of these steps have occurred, the transactions are ready to become Assets.

Range Duplicates

From time to time you may upload a Mobile Computer that has had part or all of the information in it uploaded before. For instance, you upload a Mobile Computer with 50 assets in it, and set it down. Someone needs to use the Mobile Computer, and comes up and takes it. They inventory five items with it, and then bring it back to you so that you can upload it. The Mobile Computer now has 55 assets in it, and 50 of them have been uploaded before.

Upload the Mobile Computer as normal, checking to ensure the information goes into the Transaction table, like normal. Validate the transactions. Make sure that you do not have any transactions ranged. Once the validation has been done, go to the Transaction feature, and select Range Duplicates. Immediately all of the transactions are compared to each other, and any "EXACT" duplicates will be ranged for you, and you may safely delete them.



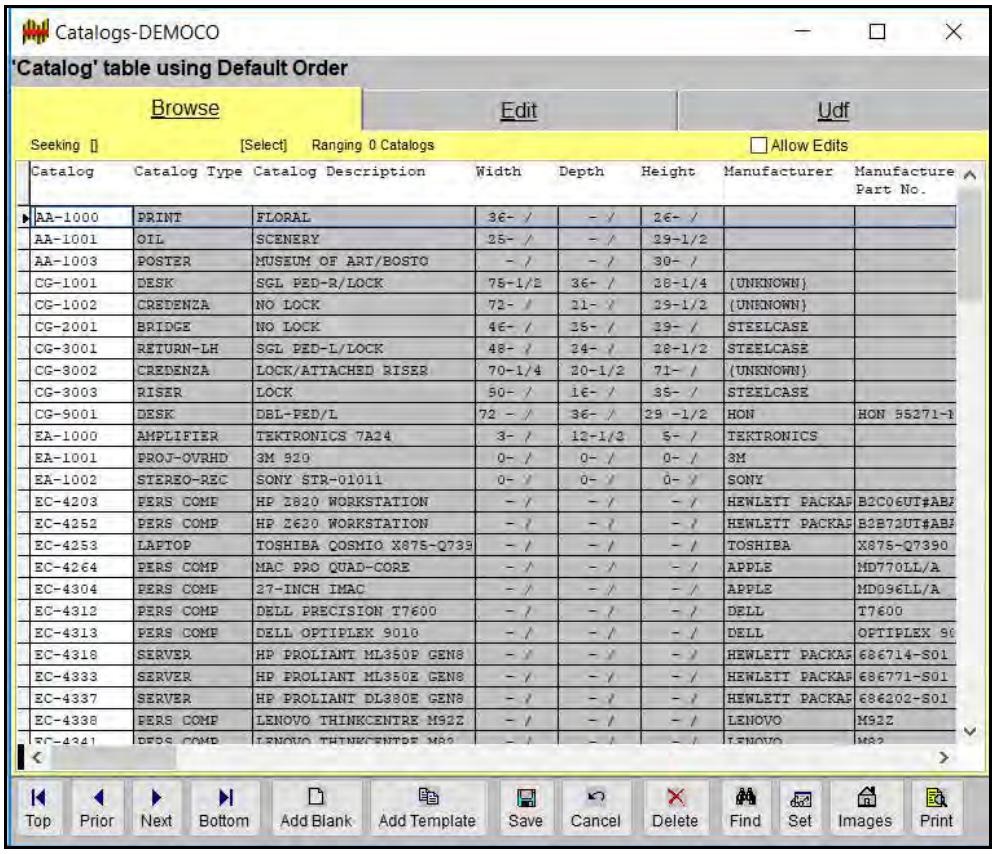
Any items that are duplicated that are not EXACTLY the same, will not be ranged. Therefore, it is safe to simply delete any items that are ranged with this feature.

This feature only checks for one duplicate. This means, if you have uploaded part of a Mobile Computer three times, the third duplicate will not be located. So, if you think there is a chance that you have uploaded any of the transactions a third time, simply wait until you have used the Range Duplicates feature, and have deleted those that were ranged. Then, validate the transactions again. Again select the Range Duplicates feature. If there are any items ranged for you during this process, it is safe to delete them.

THE CATALOG TABLE

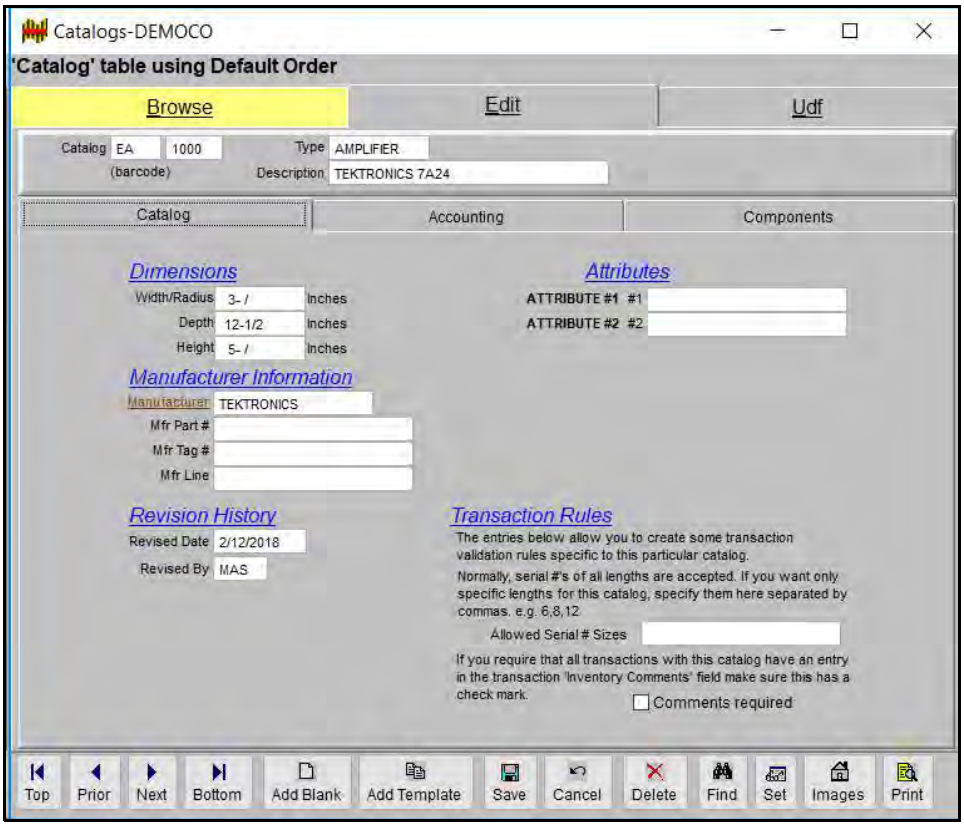
The Catalog feature permits you to precisely define and describe each different type of asset.

When wanting to view, add, change, or delete Catalogs, go to the Main Menu select File, then Open ...▸, Catalog ...▸, then Catalogs as demonstrated in the panel below.



Catalog	Catalog Type	Catalog Description	Width	Depth	Height	Manufacturer	Manufacture Part No.
AA-1000	PRINT	FLORAL	36- /	- /	26- /		
AA-1001	OIL	SCENERY	25- /	- /	29-1/2		
AA-1003	POSTER	MUSEUM OF ART/BOSTO	- /	- /	30- /		
CG-1001	DESK	SGL PED-R/LOCK	75-1/2	36- /	28-1/4	(UNKNOWN)	
CG-1002	CREDENZA	NO LOCK	72- /	21- /	29-1/2	(UNKNOWN)	
CG-2001	BRIDGE	NO LOCK	46- /	25- /	29- /	STEELCASE	
CG-3001	RETURN-LH	SGL PED-L/LOCK	48- /	24- /	28-1/2	STEELCASE	
CG-3002	CREDENZA	LOCK/ATTACHED RISER	70-1/4	20-1/2	71- /	(UNKNOWN)	
CG-3003	RISER	LOCK	90- /	16- /	35- /	STEELCASE	
CG-9001	DESK	DBL-PED/L	72 - /	36- /	29 -1/2	HON	HON 95271-1
EA-1000	AMPLIFIER	TEKTRONICS 7A24	3- /	12-1/2	5- /	TEKTRONICS	
EA-1001	PROJ-OVRHD	3M 920	0- /	0- /	0- /	3M	
EA-1002	STEREO-REC	SONY STR-01011	0- /	0- /	0- /	SONY	
EC-4203	PERS COMP	HP Z820 WORKSTATION	- /	- /	- /	HEWLETT PACKAF	B2C06UT#ABA
EC-4252	PERS COMP	HP Z620 WORKSTATION	- /	- /	- /	HEWLETT PACKAF	B2B72UT#ABA
EC-4253	LAPTOP	TOSHIBA QOSMIO X875-Q739	- /	- /	- /	TOSHIBA	X875-Q7390
EC-4264	PERS COMP	MAC PRO QUAD-CORE	- /	- /	- /	APPLE	MD770LL/A
EC-4304	PERS COMP	27-INCH IMAC	- /	- /	- /	APPLE	MD096LL/A
EC-4312	PERS COMP	DELL PRECISION T7600	- /	- /	- /	DELL	T7600
EC-4313	PERS COMP	DELL OPTIPLEX 9010	- /	- /	- /	DELL	OPTIPLEX 9
EC-4318	SERVER	HP PROLIANT ML350P GEN8	- /	- /	- /	HEWLETT PACKAF	686714-S01
EC-4333	SERVER	HP PROLIANT ML350E GEN8	- /	- /	- /	HEWLETT PACKAF	686771-S01
EC-4337	SERVER	HP PROLIANT DL380E GEN8	- /	- /	- /	HEWLETT PACKAF	686202-S01
EC-4338	PERS COMP	LENOVO THINKCENTRE M92Z	- /	- /	- /	LENOVO	M92Z
EC-4341	PERS COMP	LENOVO THINKCENTRE M83	- /	- /	- /	LENOVO	M83

The Catalog Browse Panel lists the Catalogs that have been entered into your system. The Edit Panel permits you to assign and define the different catalog entries by adding to, changing, or deleting Catalogs. The Catalog Edit Panel is shown below.



Bar|Scan provides several different ways to define and describe different types of assets. First, there are predefined groups of assets identified by a two-character Category (the first two characters of the Catalog number). Next, a Type and Description are entered.

You can further define an asset type by entering the dimensions and/or a Manufacturer. Finally, you may enter more Manufacturer information, and attributes.

Just how precise you want your Catalog entries, is entirely up to you. You can assign a Catalog Number which will be less precise and cover a relatively large number of assets or more precise to cover a lesser number of assets.

To return to the Main Menu, use your mouse to click the X on the top right-hand side of the Catalog Panel, or press the ESC key. Note, if you have pending changes or additions, you will be prompted to save or cancel them first.

Next to the undo button on the tool bar, there is a small button as shown below.

If you have the Imaging Module, this button is used to view the images that you have in your Company Asset Database. After you have uploaded the digital images, you can click on this button to view them.

You may print the images as part of your Catalog Reports, by adding this item as a column. Note: The image size defaults to one square inch in size, but you can adjust the size to suit your own needs.

THE LOCATION TABLE

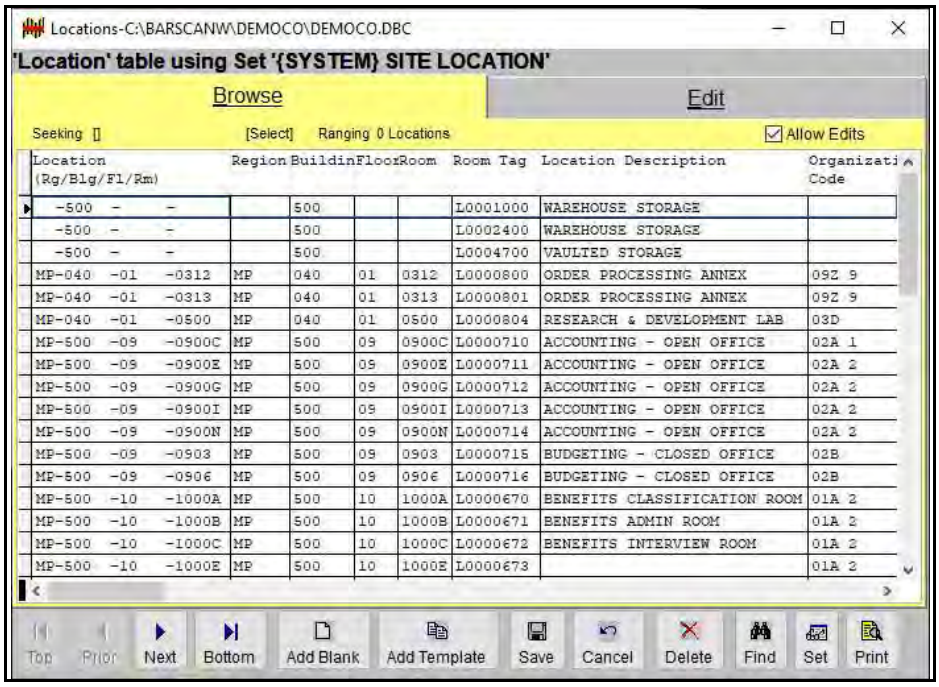
This feature is optional in that Bar|Scan does not require the information to be entered into the system. However, we recommend you use this feature. It will provide you with the ability to produce reports for individual locations of assets.

In order to properly define the particular physical location for each different asset, you will have to identify your company's location structure. This is usually entered from an existing floor plan, but can also be a future floor plan, or imported from an Excel file, CAD drawing or database.

Also entered, is a reference to the Organization Code for that particular location. Please note that Organization Codes must be entered in the Organization table before they can be referenced in the Location table.

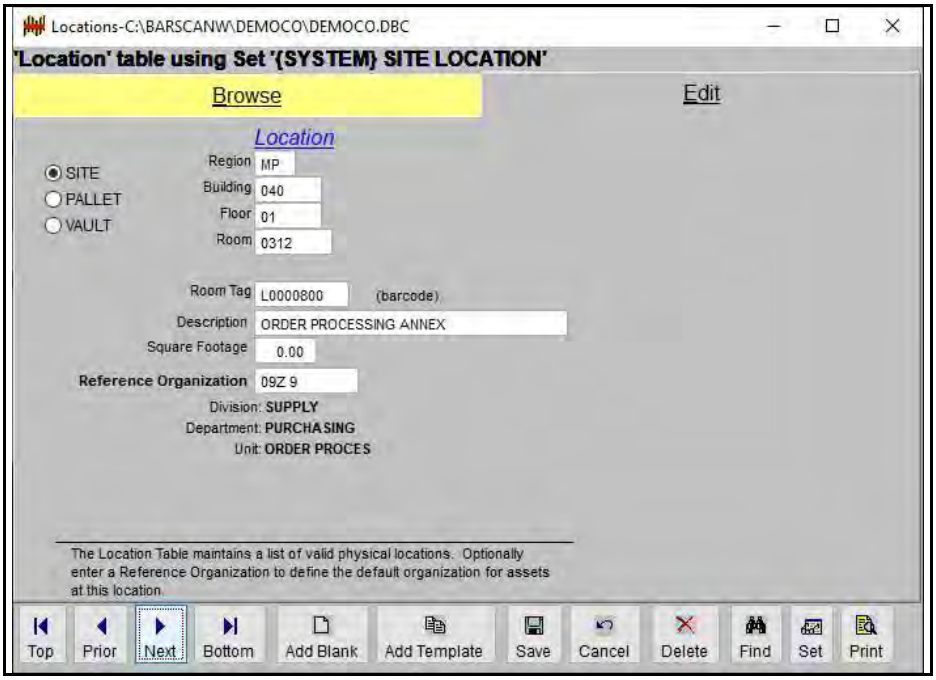
This feature permits you to enter several different levels of locations within your company, as well as three different types of locations. A bar coded room tag can also be assigned to each location to simplify the re-inventory of your assets. The bar coded room tag can be linked to the location during the inventory with the Mobile Device, and does not have to be entered in advance of the inventory.

When you want to add, change, view, or delete Locations to be used in your Company Asset Database, you will want to open the Location table. From the Main Menu, select File, then Open ...▸, Locations, you will see the Location table. The Browse Panel is shown first, which shows all of the items listed in your Location table.



Alternatively, if you have opted to display the Tables ToolBar, you can click on the location icon to open the above table. The icon is shown below.

Select the Edit tab, and you will see a panel like the one below.

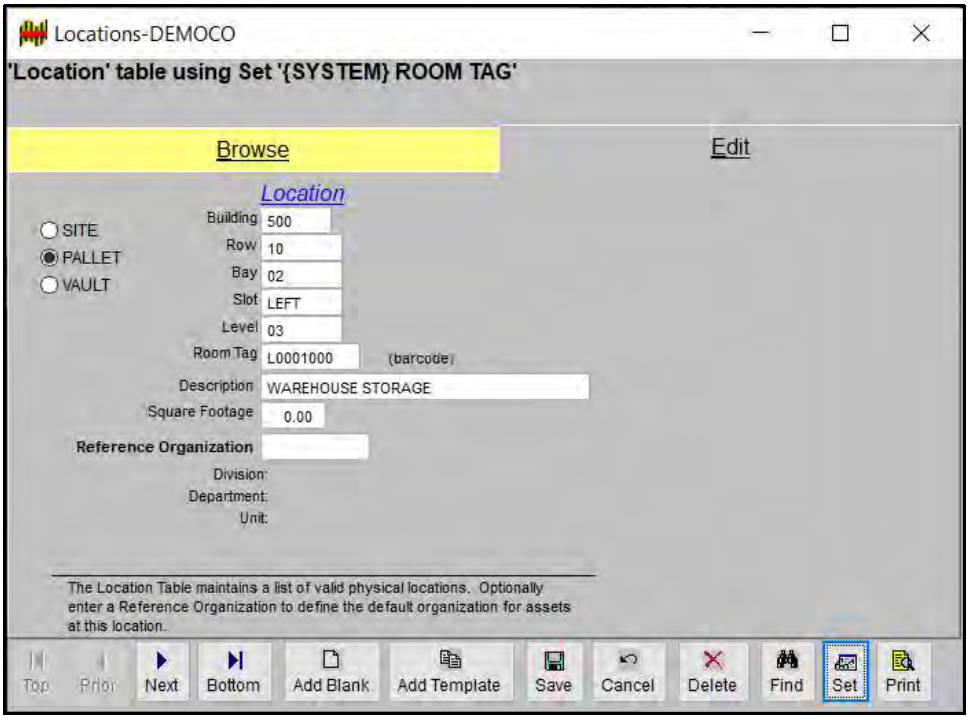


This panel displays the information which has been recorded and entered for each individual location level and optional bar code room tag.

You can add, change, delete, or view the Location Structure and the referenced organization structure.

To return to the Main Menu, use your mouse to click the X on the top right-hand side of the Location Panel, or press the ESC key. Note, if you have pending changes or additions, you will be prompted to save or cancel them first.

There are three types of locations: site, pallet, and vault. When you select a location type other than site, you will see that the location field names change as shown below.

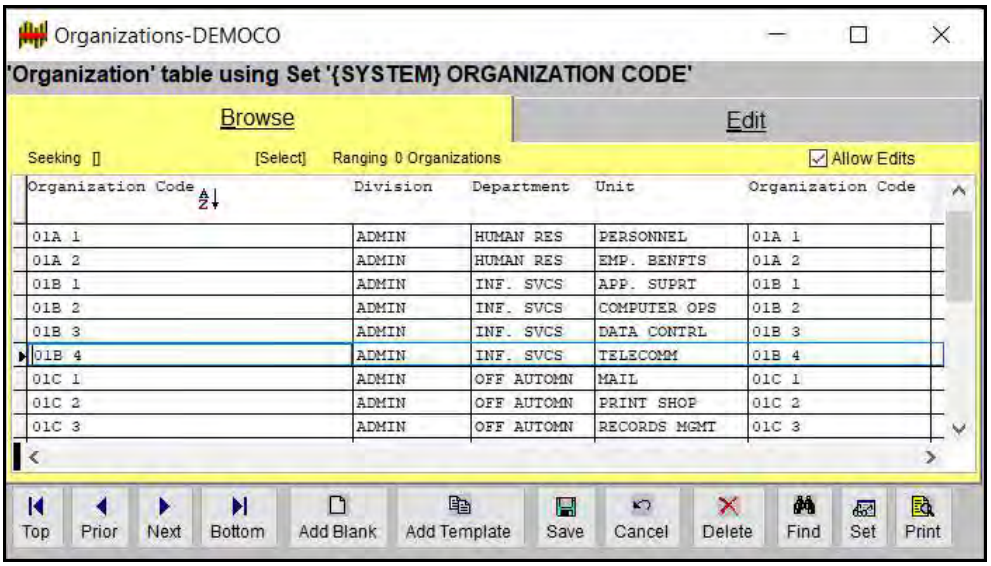


Notice that on this table, we chose Pallet as the location type. The field names are now listed as: Building, Row, Bay, Slot, and Level, instead of the Region, Building, Floor, Room that are listed for the Site type of location. The fields will again be different when Vault is the type of location that is selected. They will change to list Building, Vault, Row, Bay, and Level.

THE ORGANIZATION TABLE

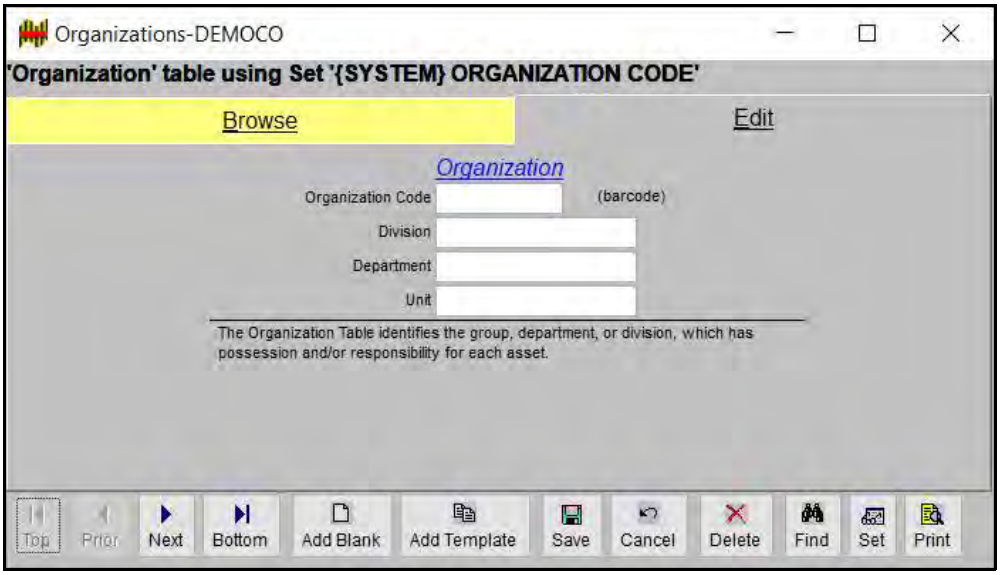
This feature is optional in that Bar|Scan does not require the information to be entered into the system. However, we recommend you use this feature. It will provide you with the ability to produce reports for individual divisions, departments, and units. In order to properly define the particular department or group which has responsibility for, and/or possession of each different asset, you will have to identify your company's organization structure. This feature permits you to enter the names you wish to use to define three levels of organizations within your company. A code is assigned to simplify the recording of the Organization Structure.

When you want to add, change, view, or delete Organizations for your Company Asset Database, you will want to open the Organization Panel. From the Main Menu, select File, then Open ...▸, Organizations, you will see an Organization Panel. The Browse Panel is shown first, which shows all of the items listed in your Organization table.



Alternatively, you can select the Organization icon to open the panel shown above, if you have the Table ToolBar on your Main Menu. The Organization icon is shown below.

Select the Edit tab, and you will see a panel like the one below.



This screen displays the information which has been recorded and entered for each individual organization level and code. You can add, change, delete, or view the Organization Codes and the information assigned to the Codes.

To return to the Main Menu, use your mouse to click the X on the top right-hand side of the Organization Panel, or press the ESC key. Note, if you have pending changes or additions, you will be prompted to save or cancel them first.

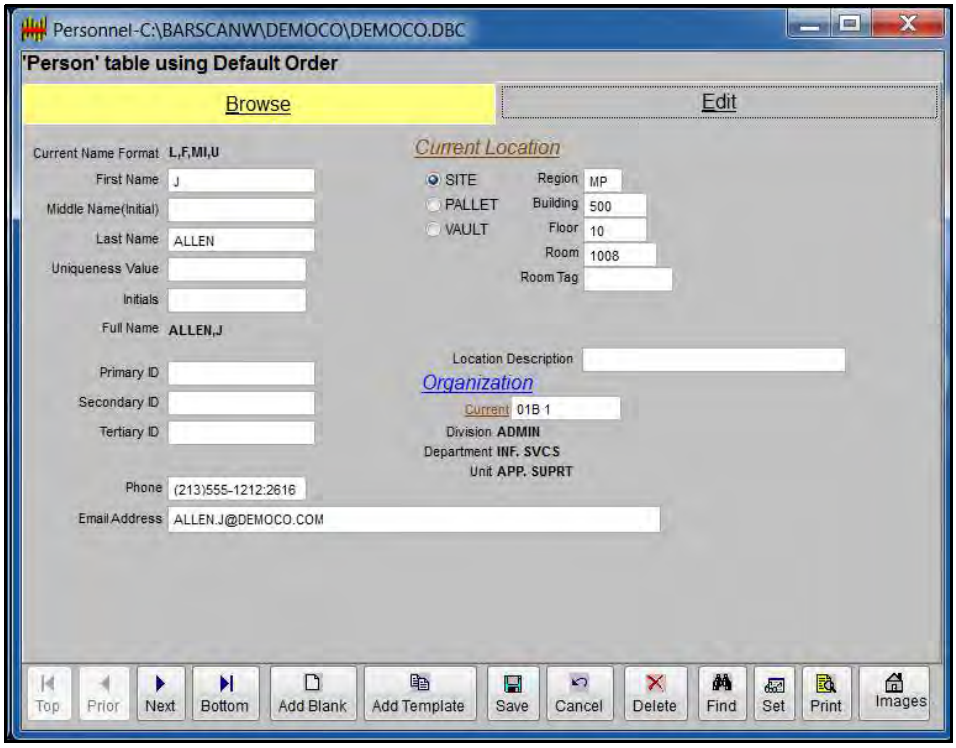
Alternatively, if you have opted to display the Tables ToolBar, you can click on the Organization icon to open the above table. The icon is shown below.

THE PERSONNEL TABLE

This feature is optional in that Bar|Scan does not require the information to be entered into the system. It will provide you with the ability to produce reports for individuals. In order to begin, you will need to key or inport your personnel list.

When you want to add, change, view, or delete Personnel for your Company Asset Database, you will want to open the Personnel Panel. From the Main Menu, select File, then Open ...▸, Organizations, then Personnel. The Browse Panel is shown first, which shows all of the names listed in your Personnel table.

Select the Edit tab, and you will see a panel like the one below .



This screen displays the information which has been recorded and entered for each individual person. You can add, change, delete, or view the Personnel detailed information assigned to each person.

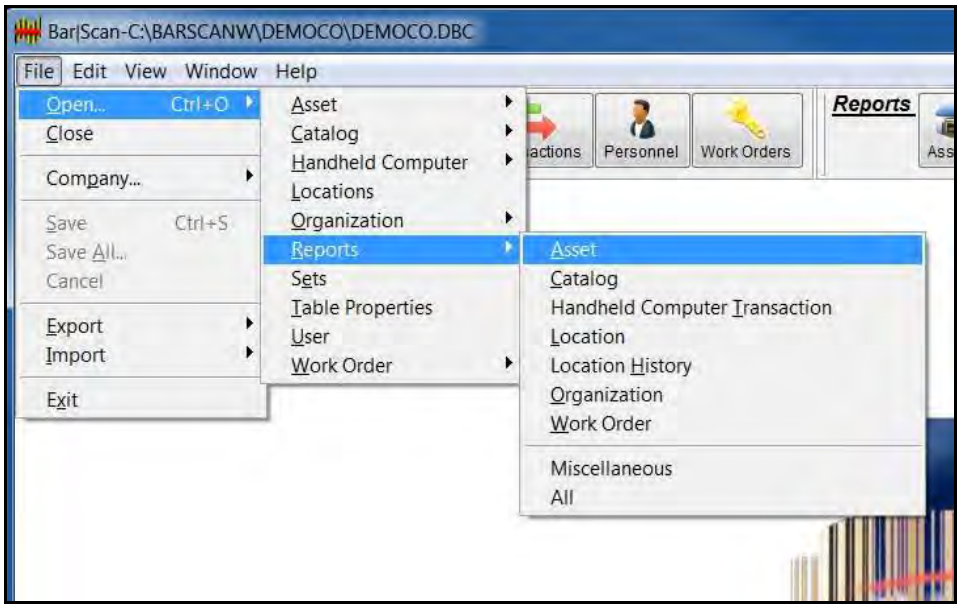
Alternatively, if you have opted to display the Tables ToolBar, you can click on the Personnel icon to open the above table. The icon is shown below.

To return to the Main Menu, use your mouse to click the X on the top right-hand side of the Personnel Panel, or press the ESC key. Note, if you have pending changes or additions, you will be prompted to save or cancel them first.

THE REPORT TABLE

When your Bar|Scan system arrives it will already contain many reports that were previously created and are labeled as System reports. There are several different purposes for the reports provided.

When you want to add, change, view, or delete Reports in your Company Asset Database, you will need to open the Report table. From the Main Menu, select File, then Open . . . ▸, Reports . . . ▸, followed by the type of report that you wish to see. If you wish to view all of the reports that are contained in your Company Asset Database, you will want to select All as the type of reports you wish to view as shown below.

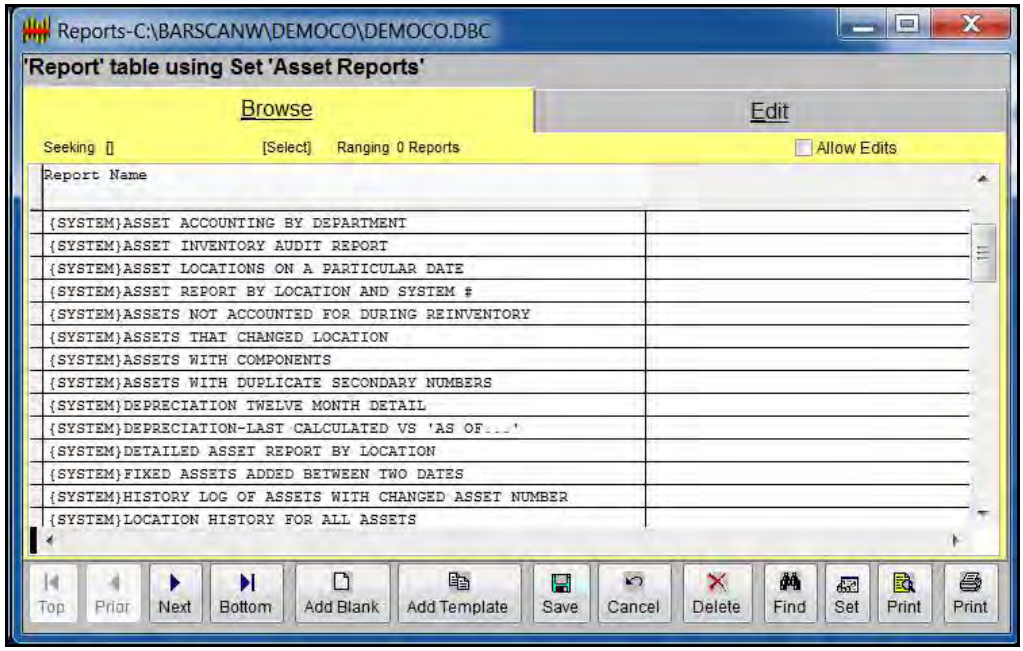


When you have selected the items in the above panel, you will be shown the Report Browse Panel, which shows all of the items listed in your Report table.

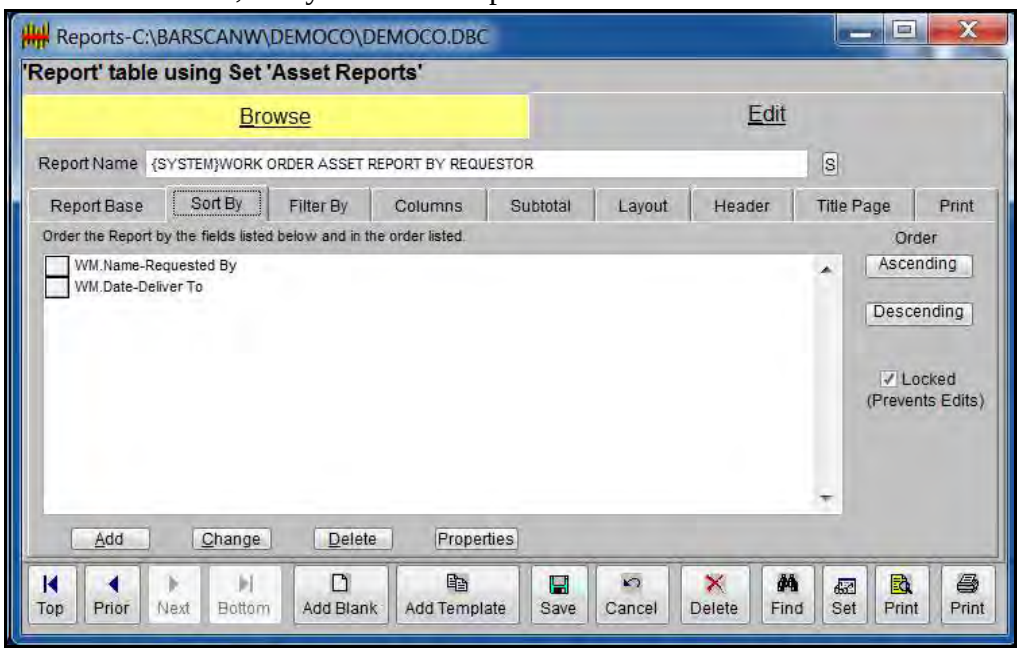
You can also use the shortcut icons to open any of the reports. To place report icons onto your Main Menu, go to the Main Menu, then select View, then Toolbars, then Report Toolbar. The following icons will appear on your Main Menu.

The icons shown above are shortcuts to the various types of reports. Simply pressing on the respective icon will allow you to go directly to that type of report.

You will be shown the Reports Browse panel where you may select the specific report that you wish to view.



Select the Edit tab, and you will see a panel like the one below.



Notice the nine tabs for this panel.

These tabs represent the processes that make up a report. What Tables the report is based on. What the reports are ordered by, filtered by, which columns are going to print, if you need to have a column break on or a page break on, the layout of the report, the header for the report, a title page for the report, and anything involving the printing of the report. Also, notice at the far right of the tool bar is a printer and a preview icon as shown below. These last two buttons are the buttons that you will be using to print and/or to preview your reports.

Asset Reports

When you select this feature, you will be presented a Menu containing all of the different Asset reports currently contained in the Bar|Scan system.

These reports will provide information about the assets currently recorded in the system.

You can create a new report, change an existing report, remove an existing report, or view the structure of an existing report.

Catalog Reports

This feature prints either a single page for each Catalog Number currently contained in the Bar|Scan system, or a complete listing of the Catalog numbers currently contained in the Bar|Scan system.

The purpose of the single Catalog Sheet is to permit you to create a Catalog book which is portable and can be used when recording new asset information using either the Asset feature, or the Mobile Computer.

The Catalog List is intended to be used with the Catalog book as a quick reference to the Catalog book, and as a reference guide when recording new asset information using either the Asset feature or the Mobile Computer.

Location Reports

This feature can print a bar coded location report to assist inventory personnel in conjunction with the mobile computer during the course of the physical inventory.

Organization Reports

This feature prints a list of your organizations within your company currently contained in the Bar|Scan system.

Transaction Reports

A Transaction Report is required each time you transfer information from the Mobile Computer into the Bar|Scan system in order to provide an *audit trail*.

Personnel Reports

This feature prints a list of your personnel within your company currently contained in the Bar|Scan system.

Work Order Reports

When you select this feature using the PRINT mode, you will be presented a Menu containing all of the different Work Order reports currently contained in the Bar|Scan system.

These reports will provide information about the work orders and their associated assets currently recorded in the system.

Work Orders are special reports in that they are disbursed and used for processing activity associated with the Work Order Module. They are not normally part of management reporting.

You can create a new report, change an existing report, remove an existing report, or view the structure of an existing report.

Location History Reports

When you select this feature using the PRINT mode, you will be presented a Menu containing all of the different Location History reports currently contained in the Bar|Scan system.

These reports will provide information about the location history of the assets currently recorded in the system.

These reports give a different perspective on your assets and are especially useful to report on turnover or movement.

You can create a new report, change an existing report, remove an existing report, view the structure of an existing report.

Miscellaneous Reports

There are a few types of reports that you may want to add to your company that do not fit the traditional categories, therefore, a Miscellaneous category is available.

Miscellaneous reports include colors, material files, condition and status codes, ownership type, and attribute categories.

Miscellaneous reports can also be used to print bar code tags on Avery Label stock.

ANY Table in Bar|Scan can be used for a report including the User Password Tables.

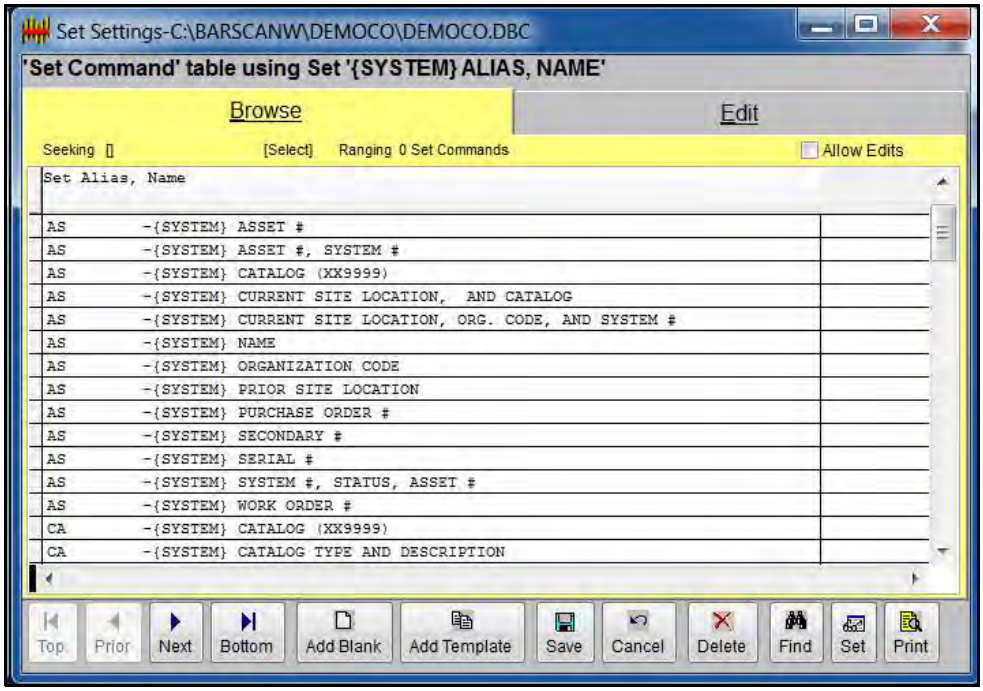
All Reports

All reports will be presented.

SETS

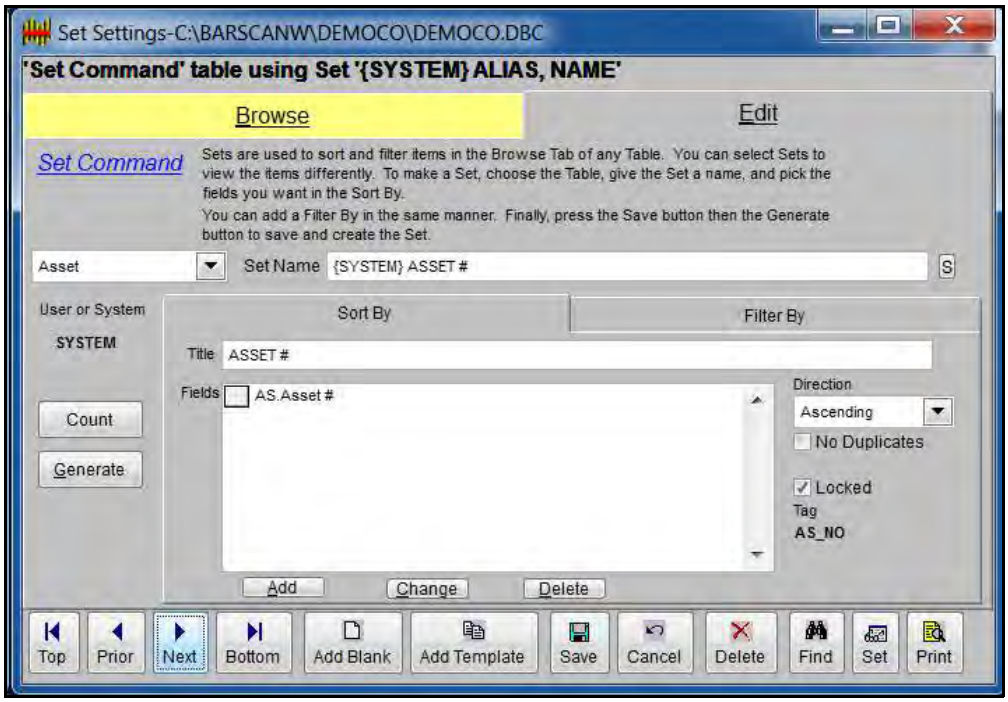
Set is a powerful feature of Bar|Scan. It allows you to order, filter, and display any field in your database. You can add customized Sets to perform extensive review and editing quickly. Review the Set capability carefully, it will be your most effective edit tool.

When you sort any of the information in any of your tables, you will be using the Set feature. You can access the Set feature from the tool bar on any panel, or from the Main Menu, simply select File, then Open ...▸, Sets, and you will be shown the Sets Browse tab, as shown below.



Notice the two letters at the far left side of this list. These letters represent the table that the set is made for, i.e., AS is the abbreviation for the Asset table. When you select the Set feature from the Main Menu, you will be able to scroll through all of the sets that you have in your Bar|Scan system.

Select a set from the Browse tab, and then select the Edit tab, and you will see a tab like the one below.

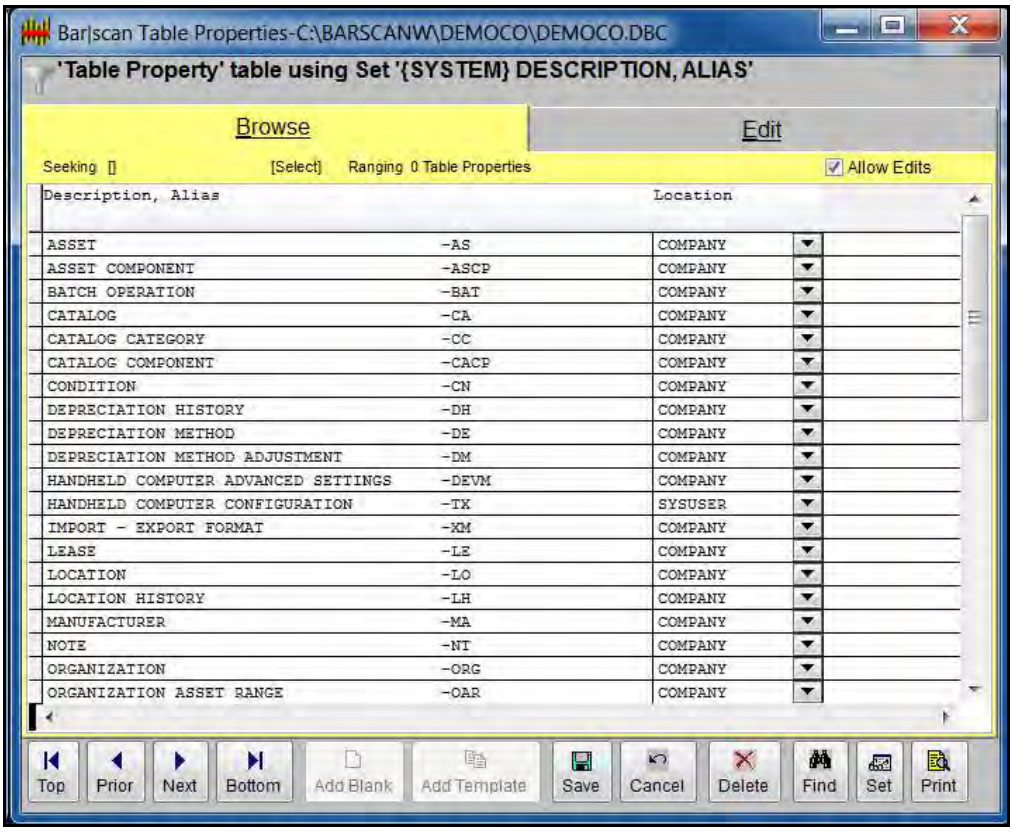


On this tab, you can add, change, save, and Generate a Set. On the set shown above, the word in the top left corner, is Asset, signifying that this particular set is from the Asset table. The set has Asset number listed as the item it is going to sort by. So, if you are looking at your Asset table, and you want to sort by Asset number, this is the Set you would choose.

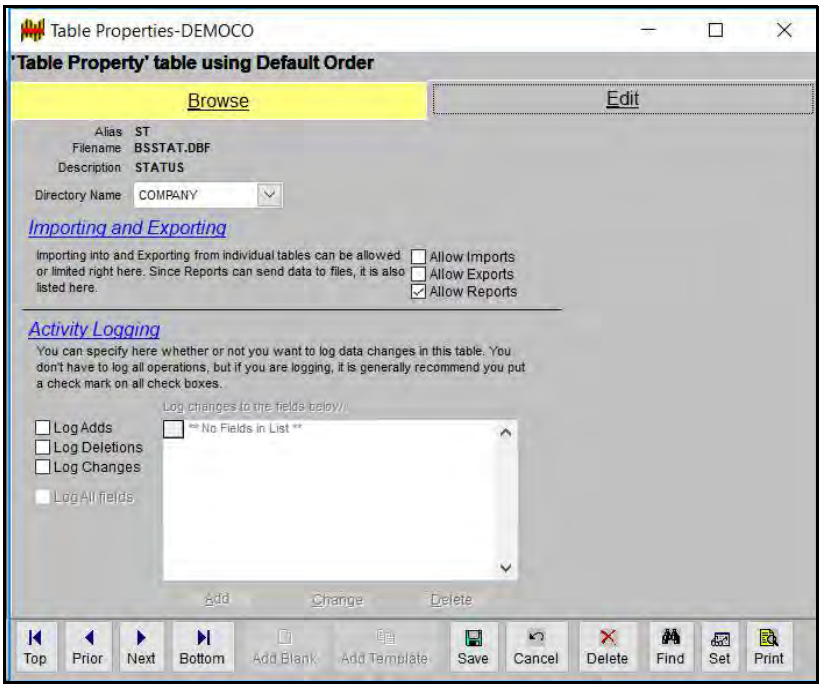
This Set feature is used extensively throughout Bar|Scan, and you should familiarize yourself with its features.

TABLE PROPERTIES

In order to select the properties of your tables, there is a Table Properties table. When you need to access this feature, go to the Main Menu, select File ...▸, Open ...▸, Table Properties, and you will see a Browse Panel like the one below.



Select a table from the ones shown on the Browse tab, and then select the Edit tab, and you will see a tab like the one below.



On this tab, you may select fields that will be logged, decide if you are going to allow imports, exports, or reports on this logged information. You may add, Change, or Delete the fields to be logged. For more information on this feature, please refer to the Import/Export chapter of this User Manual.

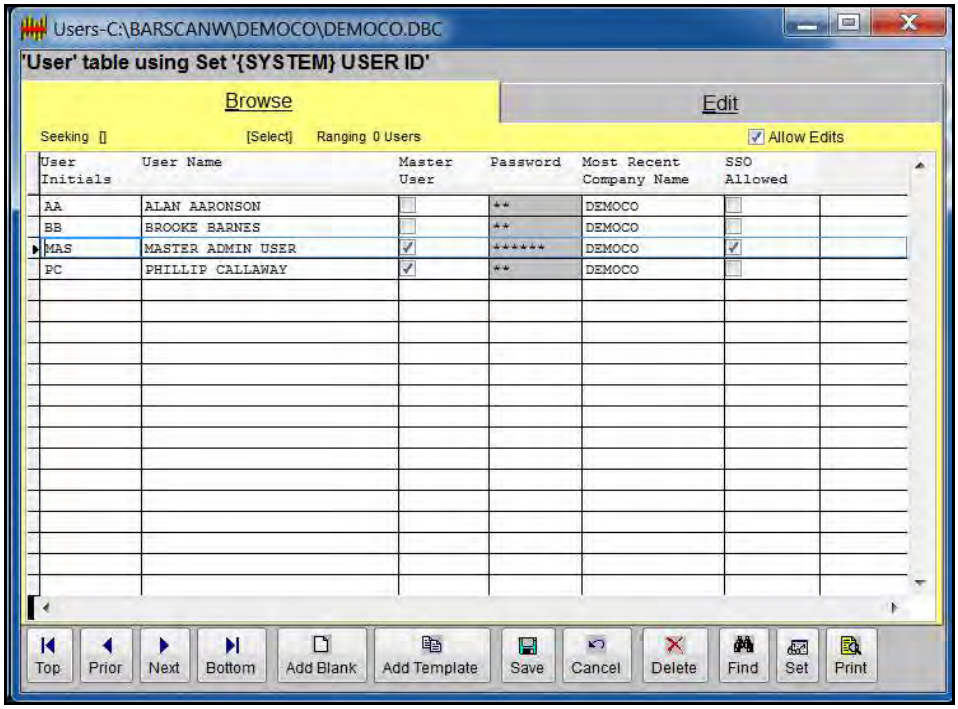
Also, by selecting the Directory Name field, you can specify where the information is stored. You may select to store the information in the Company, or in the SysUser directory. By storing the information in the Company, only that Company can use the information. By storing the information in the SysUser directory, you are sharing the information with any other Company that also stores their same table in the SysUser directory.

USER

The User feature is where all of the information for those using Bar|Scan is stored, and edited.

It can only be accessed if you are a "Master User". To access this feature, go to the Main Menu, select File ▸, Open ▸, Users. If you are not a Master User, this option will be greyed out and not accessible.

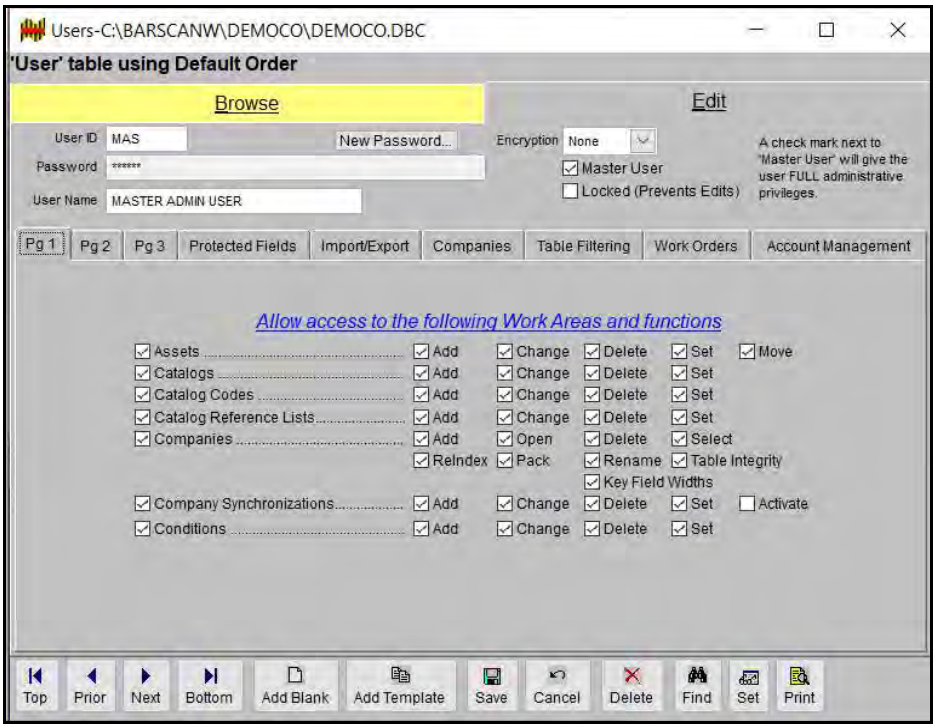
When you have opened the User Table, you will be presented with a Browse tab as shown below. It contains all your Bar|Scan User Passwords.



Select the initials that you wish to edit, and then select the Edit tab.

When your Bar|Scan system is first installed, the only user initials and password that are installed are Mas, Master. As shown here, this is the only set of User initials listed, simply select these initials, and then select the Edit tab.

As shown below, Bar|Scan has Basic Encryption available for the User ID, User Name, and Password fields. If used, these fields are stored in encrypted format within the User Table.



This panel lists the user accessible tables in Bar|Scan alphabetically and the available functions so that you may limit what information users can access according to their User ID and Password.

This is a comprehensive feature which allows you to limit the functions of a given user so that they can, for instance, be able to view Assets, but they cannot make changes or delete any of them.

Only a Master User can access this table, otherwise the word *User* on the Open drop down menu appears “greyed out” and cannot be selected.

To the right of each Table name are the functions ‘Add’, ‘Change’, ‘Delete’, Set’ plus a few additional functions. Here is what they do:

'Add' – allows the user to add a new item either at the keyboard by using the 'Add Blank' Function or the 'Add Template' function. It does not allow the user to add new items by importing or adding from a Mobile Computer.

'Change' – allows the user to change any field on any existing item. You can limit the fields that the user can change on the "Protected Fields" tab.

'Delete' - allows the user to delete any item at the keyboard. If you are using Activity Logging, a record of the deletion is created when the user deletes the item.

'Set' – allows the user to use the Set feature to reorder the items on the Browse panel. It is usually a good idea to check this even if you do not wish to allow the user to edit or delete the item. This gives the user more flexibility in viewing items.

'Move' – allows the user to move items from the Asset Table to the Asset Table of another company, e.g. "Salvage Company" and/or move items from the Transaction Table to the Asset Table.

'Begin' – this option is only available in the Batch Operations feature of Bar|Scan. It allows the user to begin a Batch process.

Here are several important functions within the Company Work Area:

'Open' - allows the user to open a Single Company database provided the Company is placed on the 'Allowed Companies List (Companies Tab) OR not placed in the 'Denied List'. This option should always be checked except under special circumstances such as in combination with 'Select' below.

'Select' – allows the user to select one or more companies that have already been opened. Checking this option off is a quick way to keep a user in only one Company.

'Index' – allows the user reindex after a problem has occurred on the hard disk. See Chapter 13 "Housekeeping" for more information on this function.

'Pack' – allows the user to condense the data files. See Chapter 13 "Housekeeping" for more information on this function.

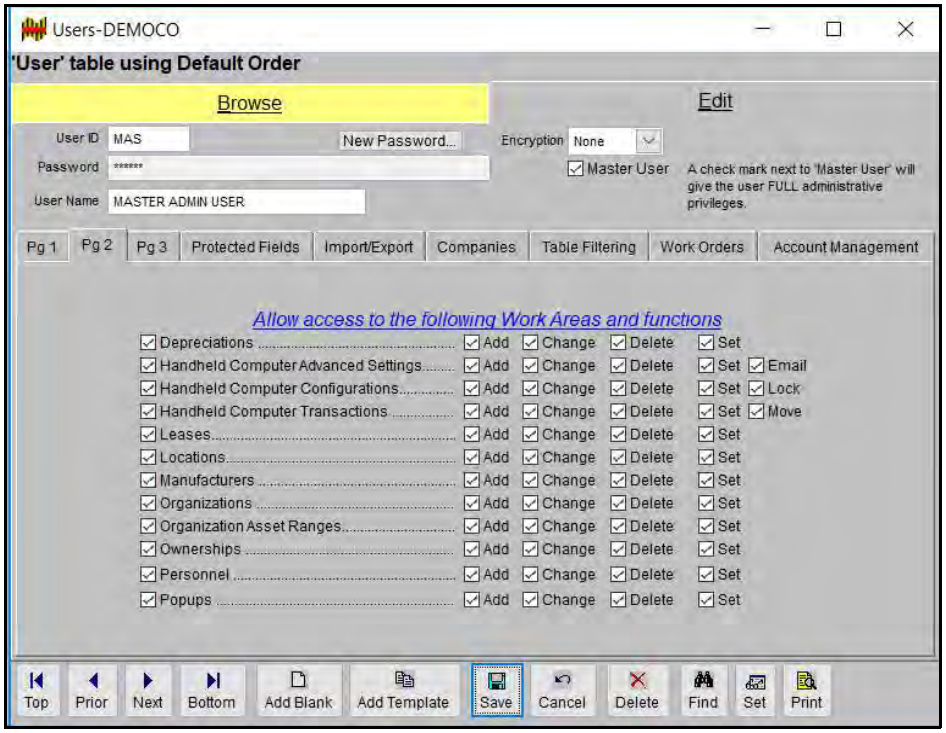
'Rename' – allows the user to rename the Company Database. Normally only the Bar|Scan Administrator should rename a company since Bar|Scan remembers the last Company name on a log-in. This could also have an undesirable effect if you are using the Bar|Scan HTML viewer or have other internet access to Bar|Scan. See Chapter 17 "Multiple Company" for more information on this function.

'Restructure' – allows the user to Restructure the Company Database. Normally only the Bar|Scan Administrator should restructure a company since it can only be performed when all other users are logged out. This function should always be performed after adding or changing a UDF (User Defined Field) as well as after installing a Bar|Scan upgrade. See Chapter 13 "Housekeeping" for more information on this function.

'Synchronize' – allows the user to access the Company Syncronization feature. Normally only the Bar|Scan Administrator should access this feature since it is an advanced option.

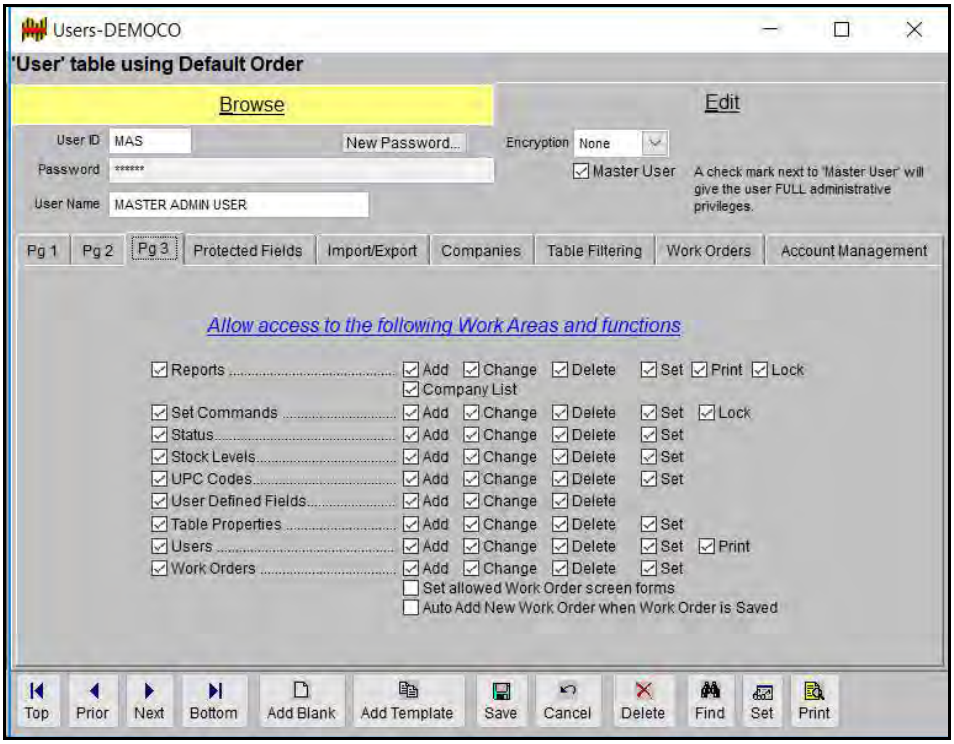
'Key Field Widths' - allows the user to change the length of special key fields in Bar|Scan. Normally only the Bar|Scan Administrator should access this feature since it is an advanced option.

The second tab of the User table will look similar to the one below.



As shown above, this panel continues to list some of the tables in Bar|Scan and the available functions so that you may limit what users can access according to their User ID and Password.

The third tab of the User table will appear similar to the one below.



As shown above, this panel lists some of the work area in Bar|Scan and the available functions so that you may limit what users can access according to their User ID and Password.

Here are several important functions within the Reports Work Area:

'Print' – allows the user to print (or export data such as an Excel file) reports.

'Lock' – allows the user to Lock and unlock reports. Normally only the Bar|Scan Administrator should Lock/unlock a report since reports, once correctly created should not have to be changed.

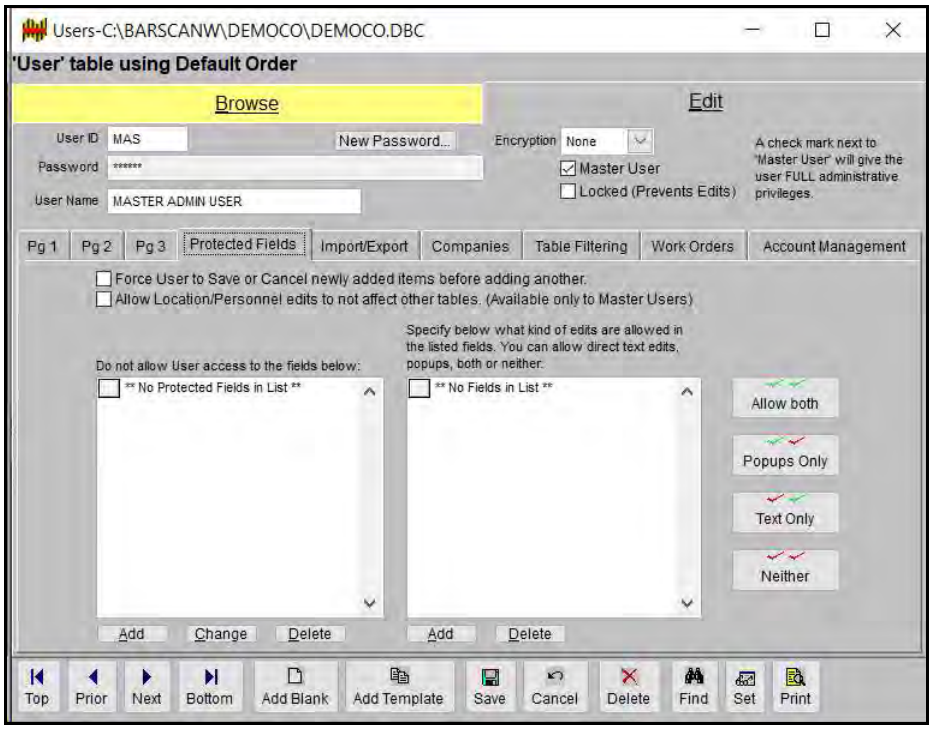
'Company List' – allows the user to access one or more separate Bar|Scan Company databases for joint reporting.

Here are several important functions within the Work Order Area:

'Set allowed Work Order screen forms' – allows the user to change the allowed Work Order screens on the Company Settings Panel.

'Auto Add New Work Order when Work Order is Saved' – Adds a new blank Work Order after the user presses save. This eliminates the additional step of pressing the Add Blank or Add Template button.

The fourth tab of the User table will appear similar to the one below.



This tab allows you to protect selected fields from a user according to their User ID and Password.

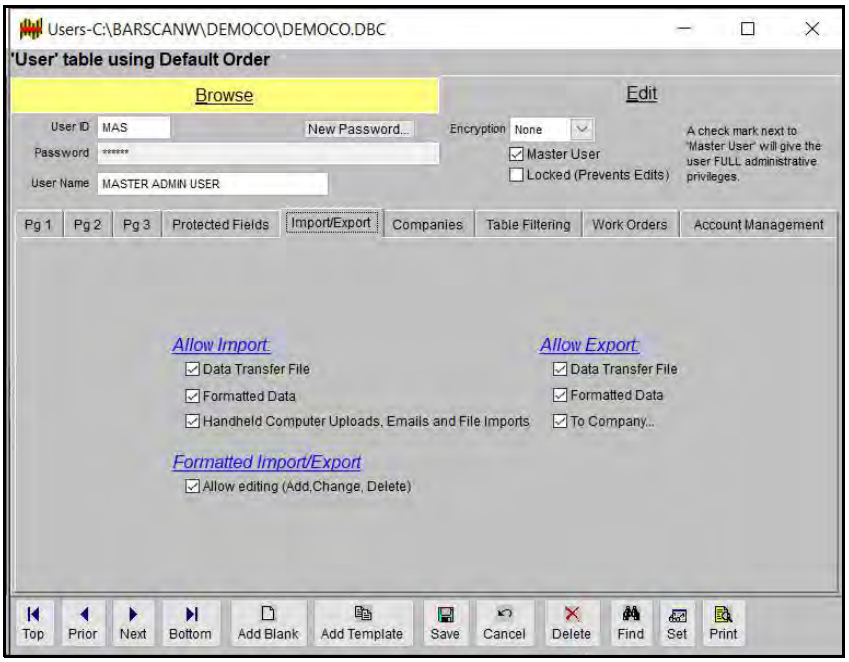
Near the top, advanced users will want to check "off" the feature "Force User to Save or Cancel newly added items before adding another. This will increase the speed of repetative data entry.

On the Left Side, you can select any field in Bar|Scan to add to this list. Once added, the field is “greyed out” on the appropriate panels and the data can be viewed but not edited. Tip: You can use the Windows Control key and Shift key combinations to highlight a group of fields from the Pop-up selection to speed the entry of items into this list.

On the Right Side, you can select how any field in Bar|Scan can be accessed. For example, you can limited access to choices displayed in a Pop-up selection. This could be useful to control data entry.

For example, you might want the User to only choose existing General Ledger Numbers from a Pop-up selection and not allow the User to create their own. Tip: You can use the Windows Control key and Shift key combinations to highlight a group of fields from the Pop-up selection to speed the entry of items into this list.

The fifth tab of the User table will appear similar to the one below.



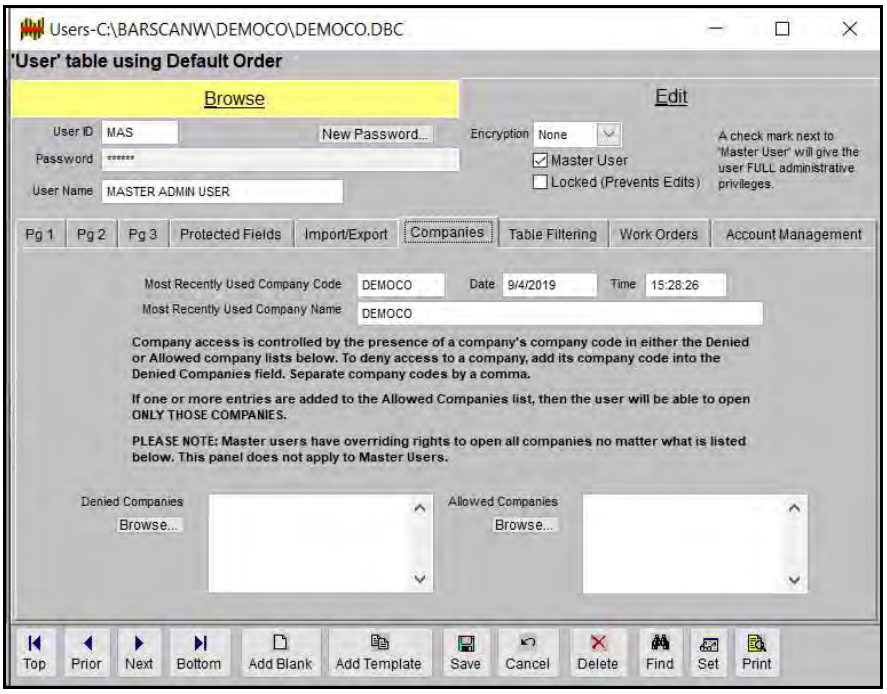
This panel allows you to limit who can import and export data, and who can edit the formats for imports and exports. It displays three sections. Here is what each of them does:

'Allow Import' – allows the user to import data into Bar|Scan from three sources. A Data Transfer File is used to move information from one Bar|Scan system to another. Formatted data is usually used to communicate with other applications such as Excel. Mobile Computer uploads and file imports are files generated by the Mobile Computer.

'Allow Export' – allows the user to export three different ways. Note: Bar|Scan can also export in other ways such as the Report Generator.

'Formatted Import/Export' – allows the user create new or edit existing Formatted Import/Export Instructions. Normally only the Bar|Scan Administrator should access this feature since it is an advanced option.

The sixth tab of the User table will appear similar to the one below.

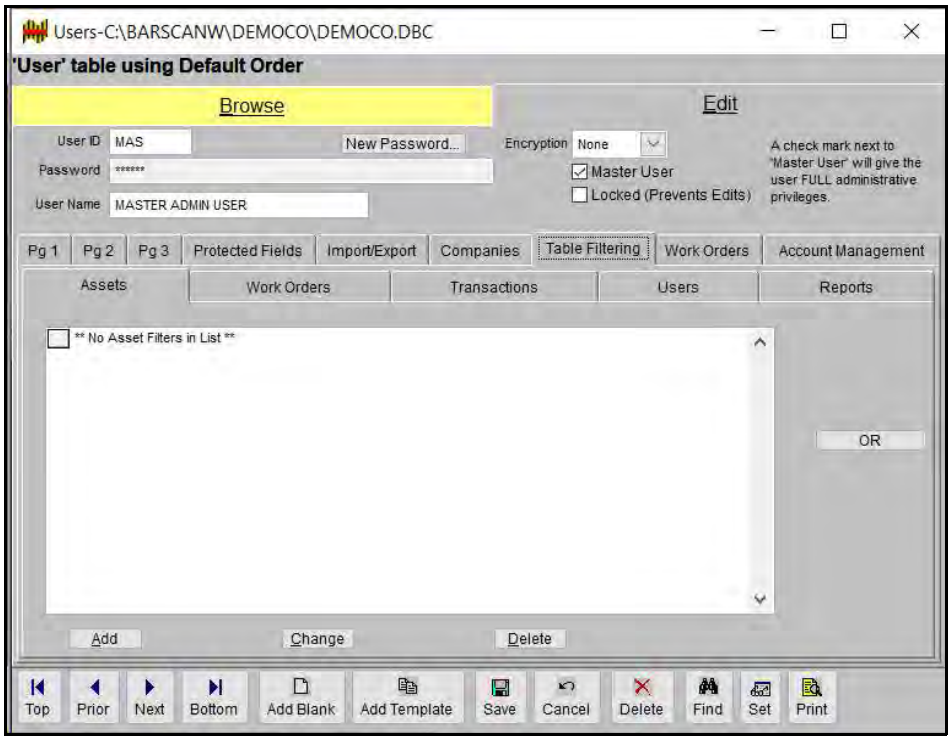


This tab lists the last company that the User ID had accessed, and the date and time of the last access. Towards the bottom, you have two areas that allow you to enter a list of companies that the user is denied or allowed access to. You do not have to fill out both of these areas. For instance, if the user should have access to all but one company, list one company in the denied companies box. If the user can only get to one company, list one company in the allowed companies box.

You complete the section by selecting the Browse button on either the Denied or Allowed List, or both. The Company Code (not the Company Name) will be inserted into the list. You can also type the company codes in separating each by a comma.

Normally only the Bar|Scan Administrator should access this feature since it is an advanced option.

The seventh tab of the User table will appear similar to the one below.



This panel allows you to limit which assets or work orders a person will be able to view or access. For instance, if you only want them to be able to see assets from a current location, you can add a filter for current location equal to that location.

Filters can be useful when you have different trades generating Work Orders. For example, you may have Installers and Help Desk personnel creating Work Orders but there would be no need for them to see each other's Work Order.

Filters can make it appear that Bar|Scan is operating slower. This is because it may take more time to display the appropriate filtered information on the Asset, Work Order or Transaction screen.

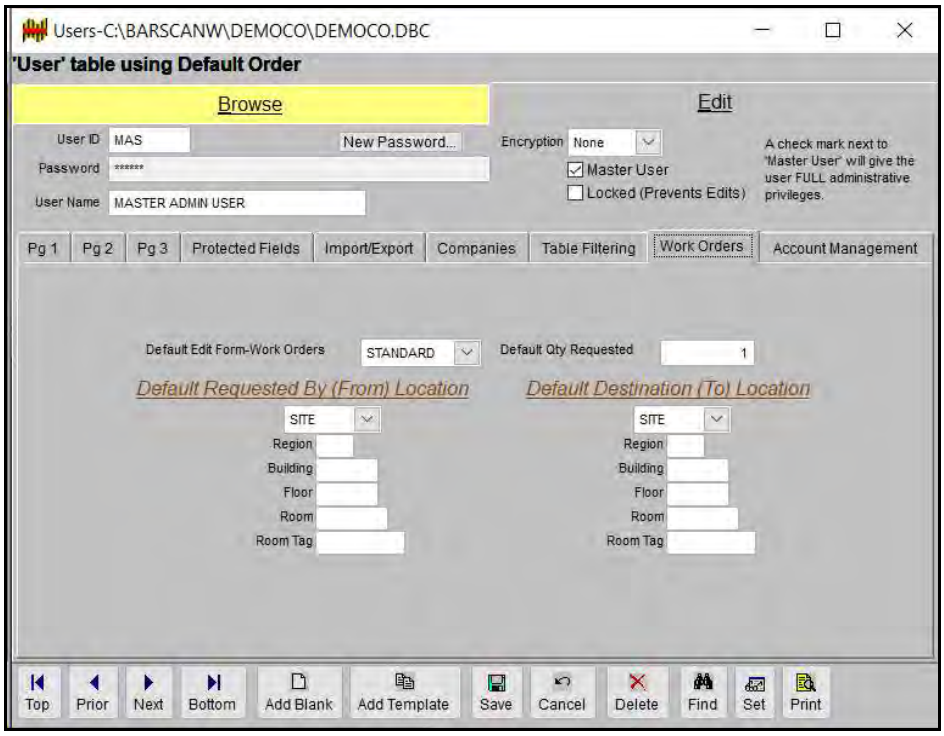
You can use the Report Tab in association with the Report Group Field on the Report Screen to control what reports a person will be able to view or access. The Report Group field is a freeform field which has many possible uses. It is not linked to other Tables and it has no special formatting, therefore it can easily be used as a filter.

So, data entered in the Report Group field in the Report Screen can be coupled with a User Table filter. For example, Users can be restricted to seeing only those reports that match the User's report filter. Since the Report Group does not actually contribute to the report itself, but rather is used to classify a report, it can be used as a user filter no matter what the contents of the report are.

Conversely, let us say that the Bar|Scan administrator wants to set up private reports, in other words, the administrator wants individual users to be able to create reports that no one else can see but they want everybody to be able to see system and shared reports. The Report Group field might be used for this.

Normally only the Bar|Scan Administrator should access the Table Filtering feature since it is an advanced option.

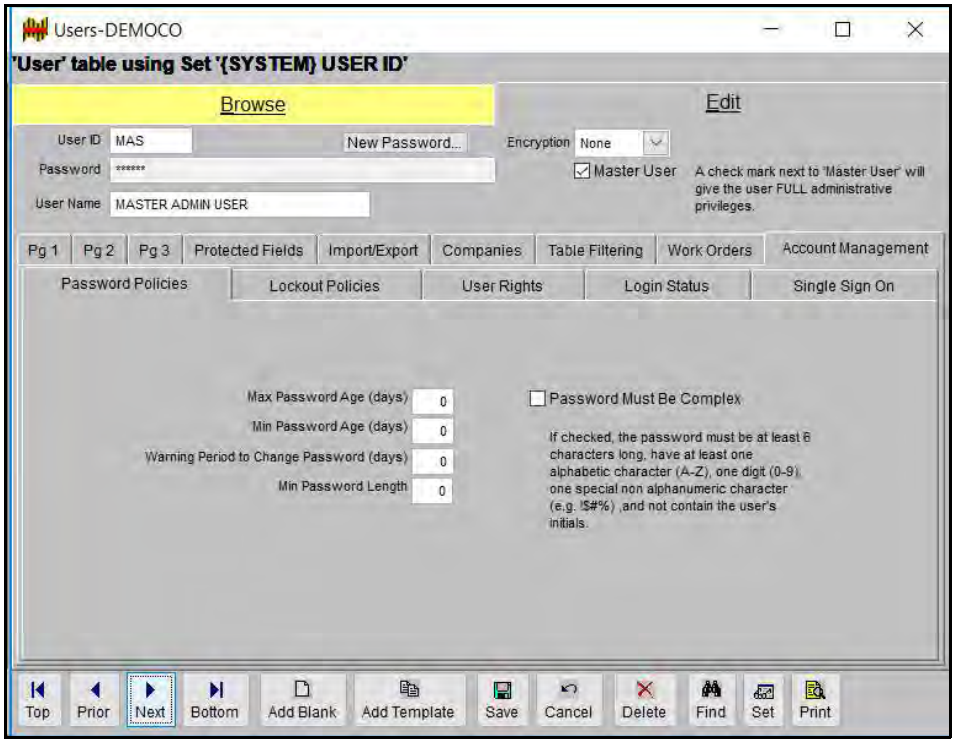
The eighth tab of the User table will appear similar to the one below.



This panel allows you to enter a default value for the Requested by or the Destination locations for the Work Order table. If the Destination is almost always one location, you should enter that location here, and each time a work order is made, the default location will appear. The default can be changed by the person creating the work order.

Normally only the Bar|Scan Administrator should access this feature since it is an advanced option.

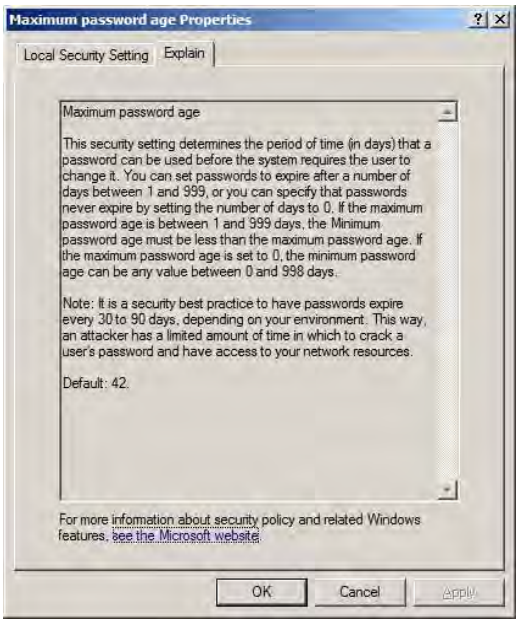
The ninth tab of the User table will appear similar to the one below.



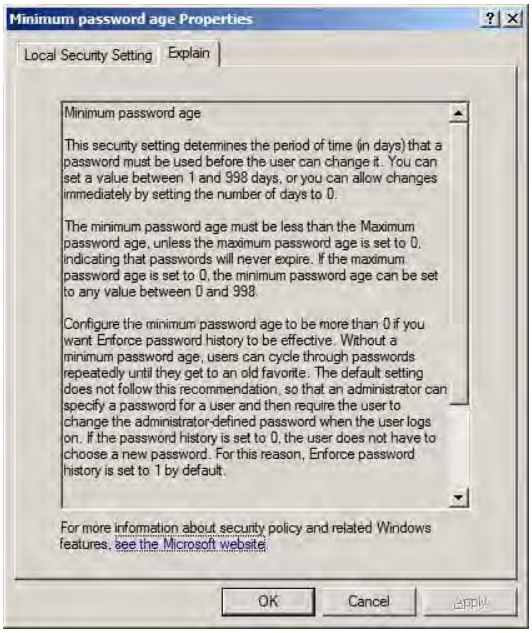
Account Management is used for advanced control of your User's passwords.

Here is Microsoft's explanations for the various fields. You can review these explainations yourself by opening the Panels in your Computer's Control Panel-> Admin-> Local Security Policy. Then select 'Properties'.

Max Password Age. <=Zero means no age limit. Below is Microsoft's policy:



Minimum Password Age, except there is no password history enforcement. If the value is <= zero (0) then it can be changed right away. Below is Microsoft's policy:

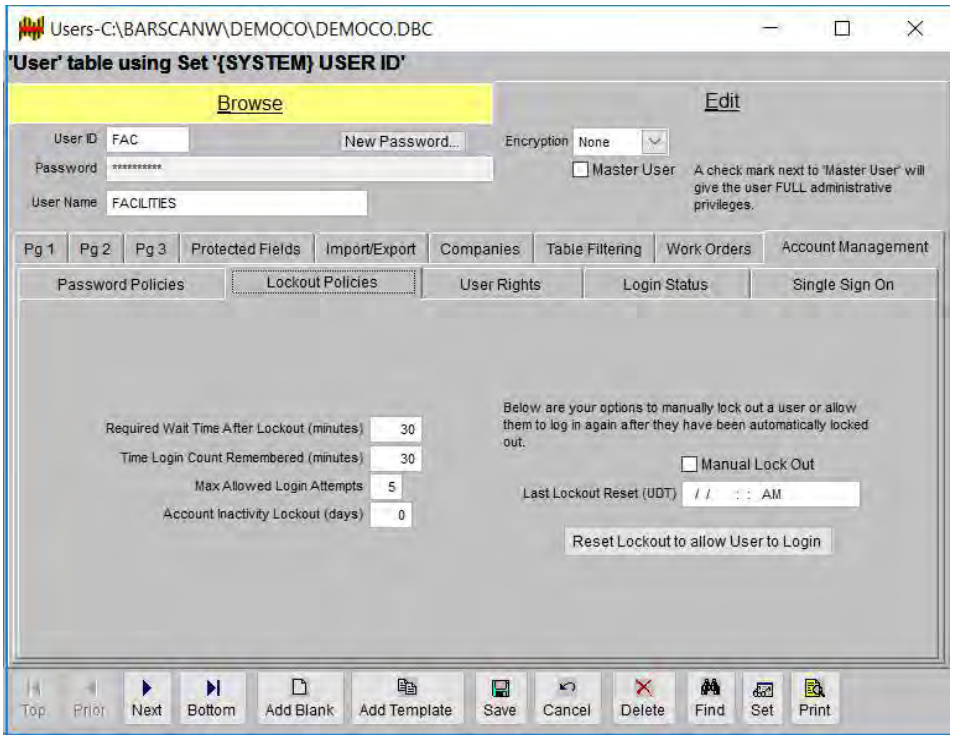


'Warning Period to change Password' – 0 = disabled. If larger than zero gives a warning prior to expiration of current password the designated number of days ahead of time.

'Minimum Password Length' – 0-99 Required Length of password (not implemented in version 2.8.1).

'Password must be complex' – If checked, the password must be at least 6 characters long, have at least one alphabetic character (A-Z), have at least one digit (0-9), have at least one special non alphanumeric character (e.g. !$#%) and not contain the users initials.

The Lockout Policies tab is displayed below.



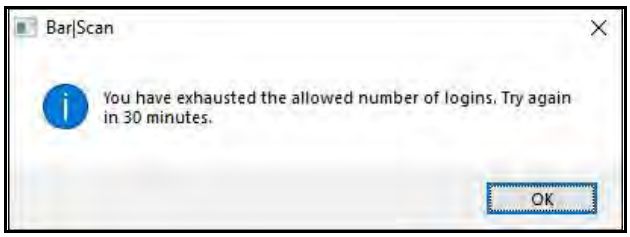
'Required Wait time after Lockout' –If the user exceeds the maximum allow login attempts, then his account will be locked the number of minutes specified in the Required Wait Time after Lockout. Once the time has been passed, they can

attempt another login. Zero (0) keeps the account locked until the administrator unlocks it. Negative values allow immediate retry on the login, any other positive values specify the amount of time to wait in minutes.

'Time Login Count Remembered' –If a user attempts to login and has at least one failure and decides to abandon the attempt before being successful, the number of attempts that have been made so far will be remembered for the amount of time specified. If they try to login before the time is expired, the number of attempts so far is remembered and the count continues from the last one made. Once the time has elapsed, then the number of attempts so far is reset to zero. There is no time limit on attempts value is <=0.

'Max Allowed Login Attempts' –The maximum number of tries allowed in one session before the account is locked. Depending upon the 'Required Wait Time after Lockout', the user may either be able to log in once the specified amount of time has elapsed, or they may be permanently locked out until addressed by the administrator.

When the user enters an incorrect password for more than the maximum number of login attempts, the password is disabled and the user is locked out. The user will be shown the following screen:

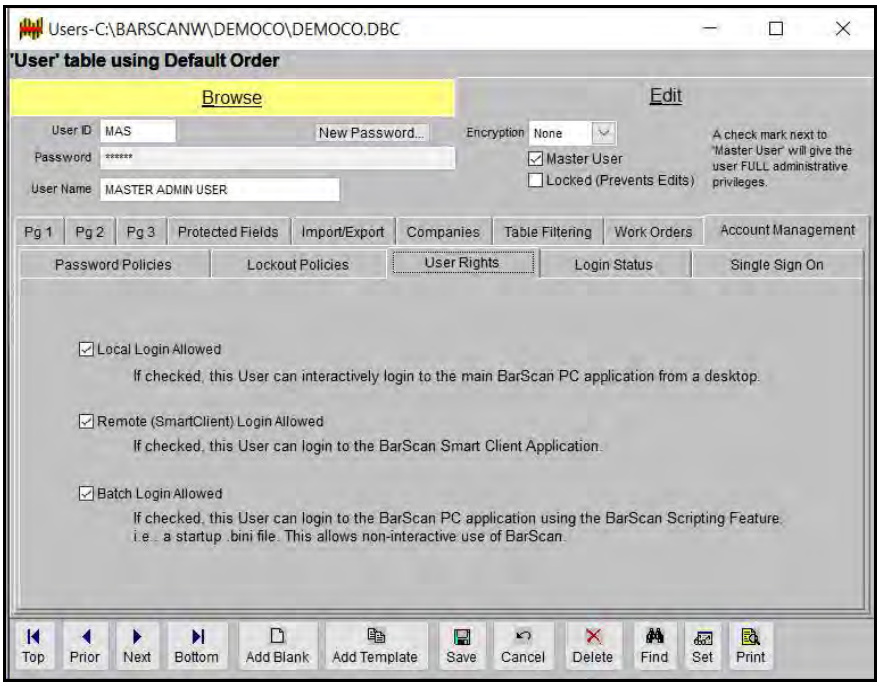


'Account Inactivity Lockout' – 0 = no inactivity lockout. If the account is not used within the specified number of days (i.e., nobody logs in), the account is automatically locked out until unlocked by the administrator.

'Manual Lockout' – The user is locked out until the check mark is cleared.

'Reset Lockout to allow User to Login' - This is used to unlock the user so that the user can log back in. It does not reset the parameters.

The User Rights tab is displayed below.



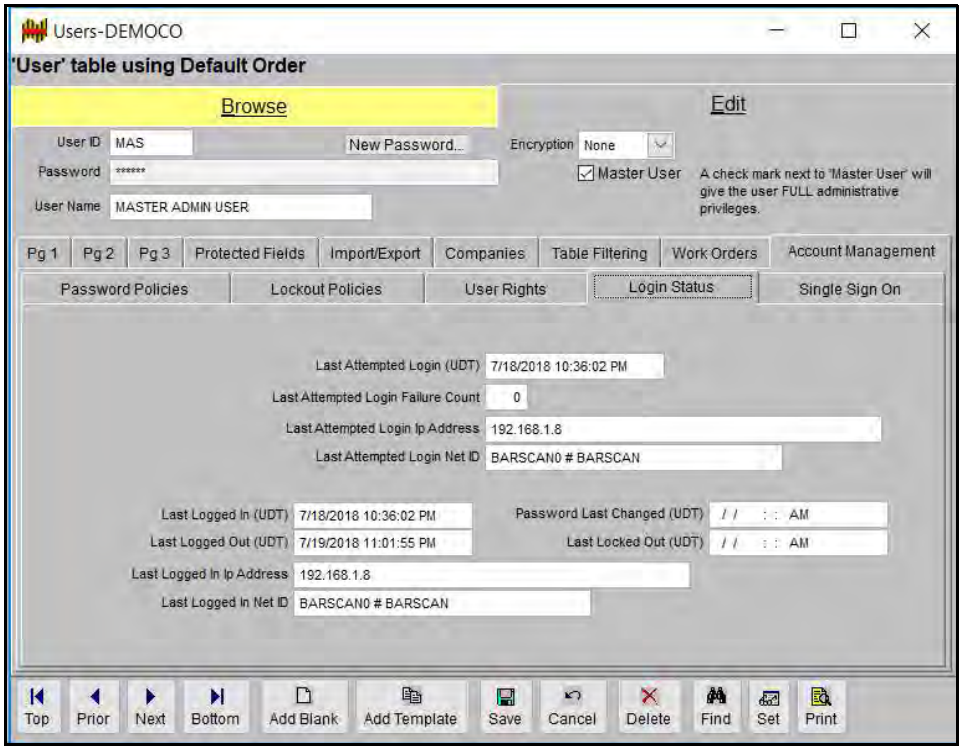
'Batch Login Allowed' – This controls the ability for the User to login using the Bar|Scan Scripting Feature.

'Local Login Allowed' – This controls the ability for the User to login using the Main Bar|Scan Application.

'Remote (SmartClient) Login Allowed' – This controls the ability for the User to login using the Bar|Scan SmartClient Application.

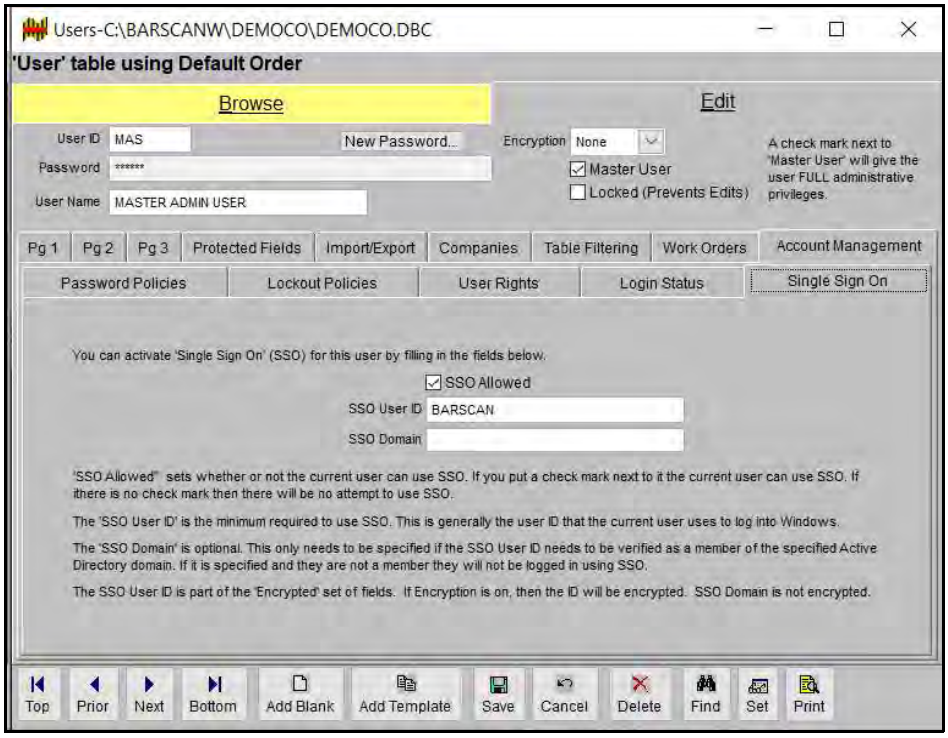
The Login Status tab is displayed below.

Here is an example of how you can use this tab. You can force someone to change their password by setting the maximum password age to the standard desired value, then changing their date of last login to one day before that. For example, if the standard age is 42 days, select a date at least 43 days ago then change the field 'Password Last Changed (UDT)' to reflect the date 43 days or more ago.



The Single Sign on tab is displayed below.

You can bypass the Welcome Screen by optionally using the Single Sign On feature. Using Bar|Scan Single Sign On (SSO), the Bar|Scan Login is replaced with your current authenticated Windows or Active Directory account.



Single Sign On (or SSO) implementation is via an addition to the User Screen under ‘Account Management’. Within this screen are three fields. Field “SSO Allowed” enables/disables the function for the current user of the screen., “SSO User ID” is basically the Windows User ID used to log in to Windows, and “SSO Domain” is the Active Directory of the user.

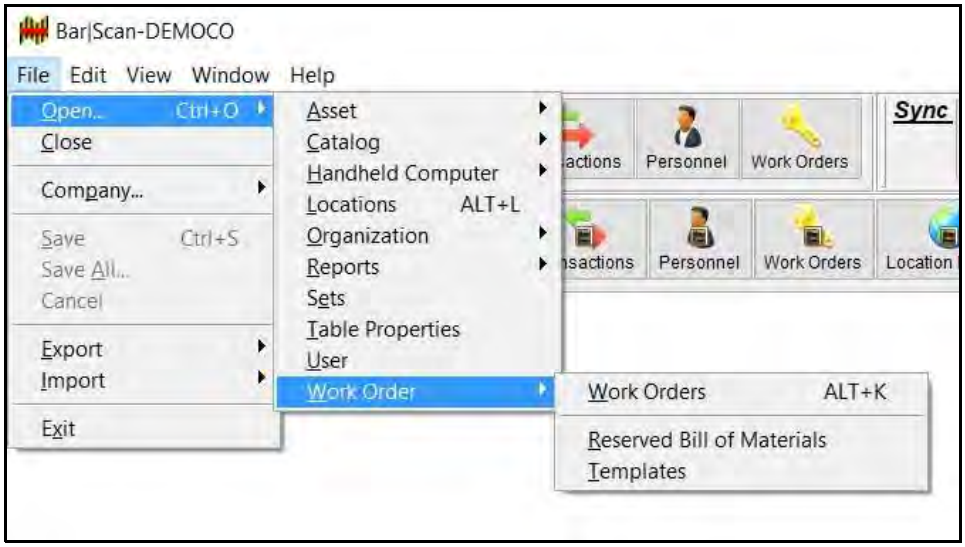
For SSO to be active, both the ‘SSO Allowed” must be checked ‘on’ and the ‘SSO User ID’ field must be filled in with the user’s id. The ‘SSO Domain’ name is optional. It is only needed if managements wants to specify that this particular user must also be a member of the specified Active Directory Domain.

WORK ORDERS

The Bar|Scan Work Order Module allows you to place work orders for various assets either specifically, by asset number, or generally, by catalog description. Each Work Order has a unique number, the name and telephone number of the person placing the order, the name of the crew assigned the task, the division, department and unit to charge, deliver to location, and notes/instructions regarding the order.

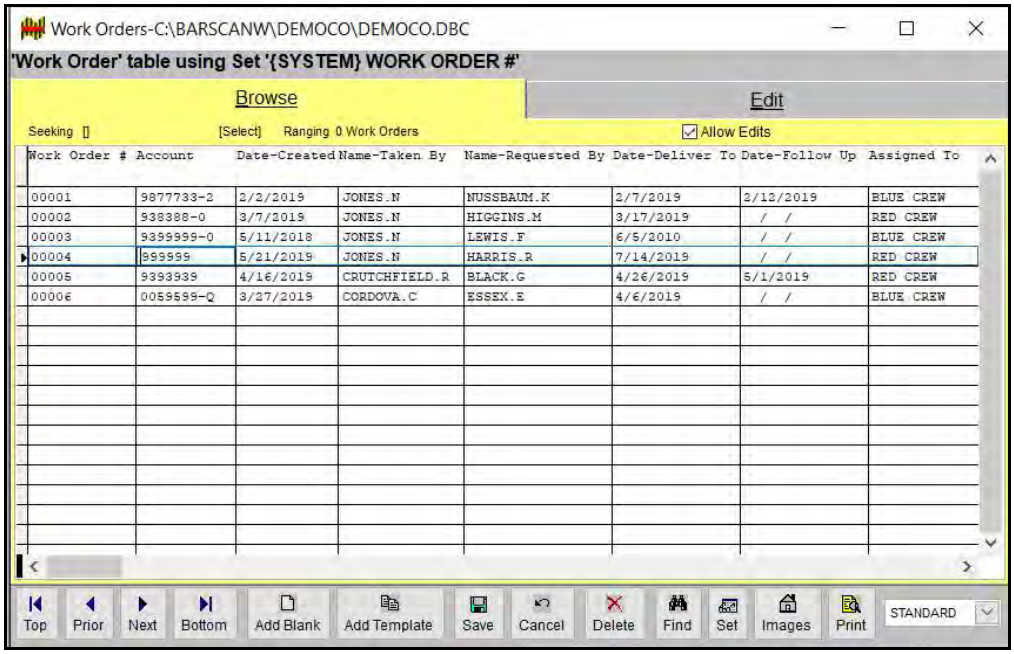
As the work order is filled, each asset is scanned with its related Work Order Number using the Mobile Computer. When this information is uploaded to Bar|Scan and moved to the asset file, it updates the Work Order status identifying what portion, if any, is still incomplete.

From the Main Menu, select File, then Open ...▸, Work Orders as shown below.



Alternatively, you can open the Work Order table by clicking on the Work Order icon if you have the Tables Toolbar on your Main Menu. The icon is shown below.

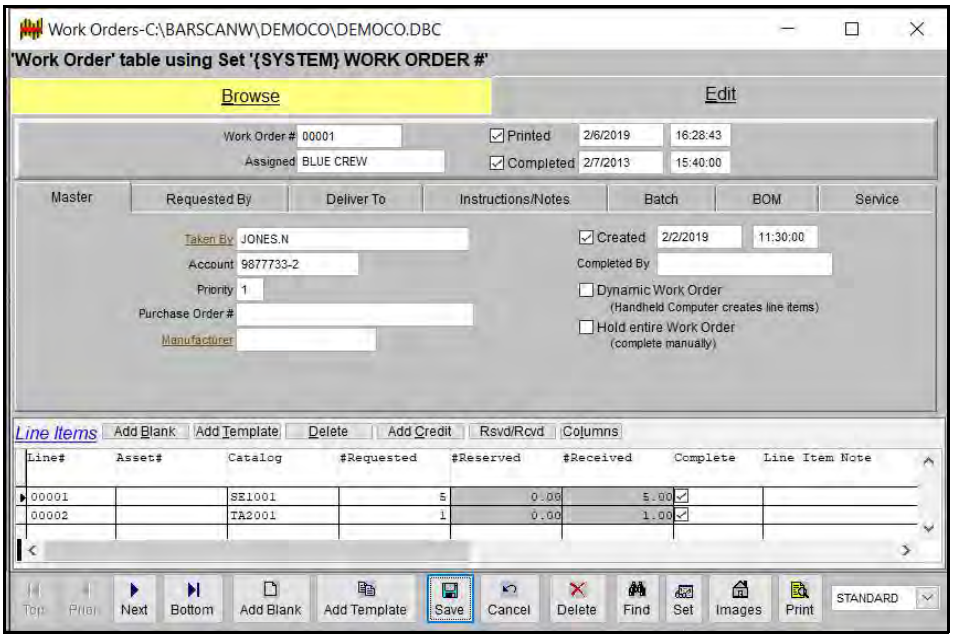
When the Work Order table opens, the browse tab is displayed by default, and will look similar to the one below.



As shown above, the Work Orders Browse screen contains a list of all of the Work Orders that have been put into the system.

On this panel you can select which Work Order you want to view, change, use as a template (although you can add a Work Order from a blank as well), or delete. Once you have selected a particular Work Order, click on the Edit tab to view the details.

Select the Work Orders Edit Tab and you will be shown a panel similar to the one below.



Note that this Work Order Edit Panel has seven tabs of it's own. The Master Tab is defaulted to open. The Requested By and Deliver To tabs show where an item was requested from and where it is going to. The Instructions/Notes Tab is for miscellaneous instruction notes. The Batch Tab is for interfacing with a Maintenance Management application. The Bill of Materials tab is when linking reserved assets. The last tab is for perparing Service Orders (or detailed work processing) for the mobile computer.

Line Items are shown at the bottom of the Master tab. To add line items, the user presses the Add Blank or Add Template button. The system will automatically supply a line number. There are two basic types of line items which can be entered -- a quantity of items, by catalog or a specific asset, by asset number. The system completes the catalog number field when a specific asset number is selected. You may select line items by catalog or specific asset. You may also select both on the same Work Order.

As the work order is filled, each asset is scanned with its related Work Order Number using the Mobile Computers. When this information is uploaded to Bar|Scan and moved from the transaction table to the asset table, it automatically updates the Work Order Line Items table identifying what portion, if any, is still incomplete.

When items are requested by quantity and catalog number, the system compares the asset scanned to the line items by catalog number to determine which line item to update. The system then checks whether the current location matches the deliver to location on the Master Work Order panel. If it matches, the system increases the Quantity Received total by one and if the Quantity Received matches the Quantity Requested, it updates the line item as Complete.

This Display Screen shows that both line items are complete. When all line items are complete, the Work Order is ready to be closed.

When items are requested by specific asset number, the system simply compares the current location of the asset to the deliver to location on the Master Work Order Screen. If they match, the system increases the Quantity Received to one and updates the line item as complete. If the location does not match, it increases the Quantity Reserved to one and the line item remains incomplete.

This Display Screen shows that both line items are complete. When all line items are complete, the Work Order is ready to be closed.

Once all line items are complete, Bar|Scan will update the Work Order panel as *complete* (Y) and will also show a *Completed Date*.

Bar|Scan also allows you to identify which Work Orders have been printed.

Like all modules with Bar|Scan, reports can be generated ordered or filtered by any of the data elements contained within the Work Order Module.

In addition, some custom reports have been added to the Work Order reports. The custom Work Order Reports can not be changed or used as a template, but can be printed out.

RESERVED BILL OF MATERIAL

The Reserved Bill of Materials is optional. A Work Order does not require the use of the Reserved Bill of Materials.

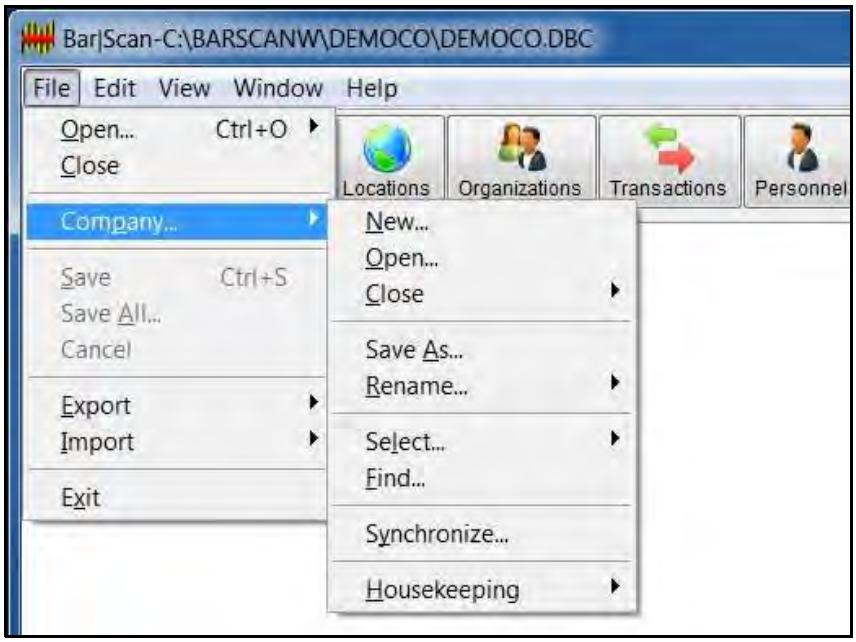
The Reserved Bill Of Material is used so that assets will not be available for use to build other groups or be moved to other locations.

TEMPLATES

The Templates table is where repetitive Work Orders are created and saved for use. For example, if machine needs annual maintenance or a delivery of supplies is made weekly, you should use this feature to avoid reentering the same Work Order more than once.

THE COMPANY FEATURE

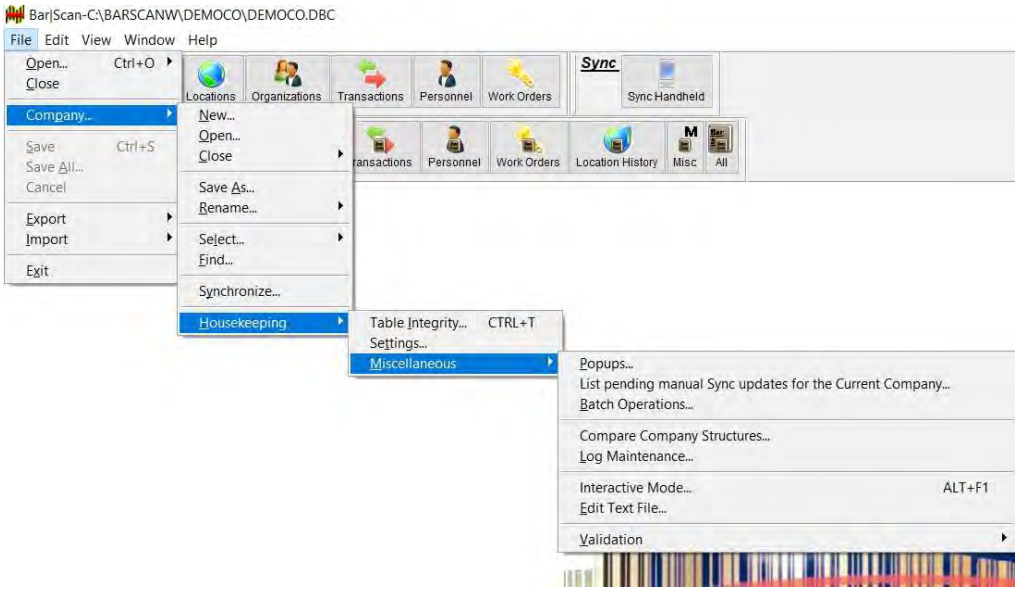
There are several features listed when you choose File ...▸, Company, as shown below.



Using this feature, you can make a new company database, open a company, close a company, save the company, rename a company, select a company, search for a specific field in any of your companies, or access the Housekeeping features.

HOUSEKEEPING

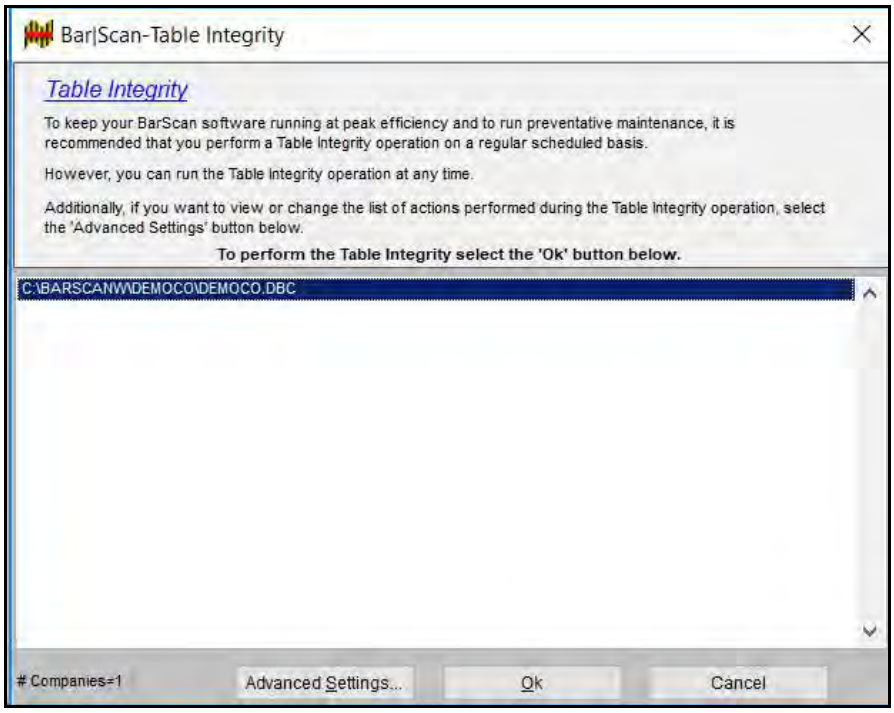
When you need to access any of the Housekeeping features, select File ...▸, Company ...▸, Housekeeping from the Main Menu, as shown below.



Housekeeping items control and affect the overall operation of the Bar|Scan System. In most cases, these items are only selected occasionally, and are briefly discussed on the following pages.

Table Integrity

There are ten items listed on the Housekeeping drop down menu. If you select the first of these items, Table Integrity, you will see a window similar to the one below.



The use of this screen and the Advanced Settings button shown above are discussed in detail in the Housekeeping chapter of this User Manual.

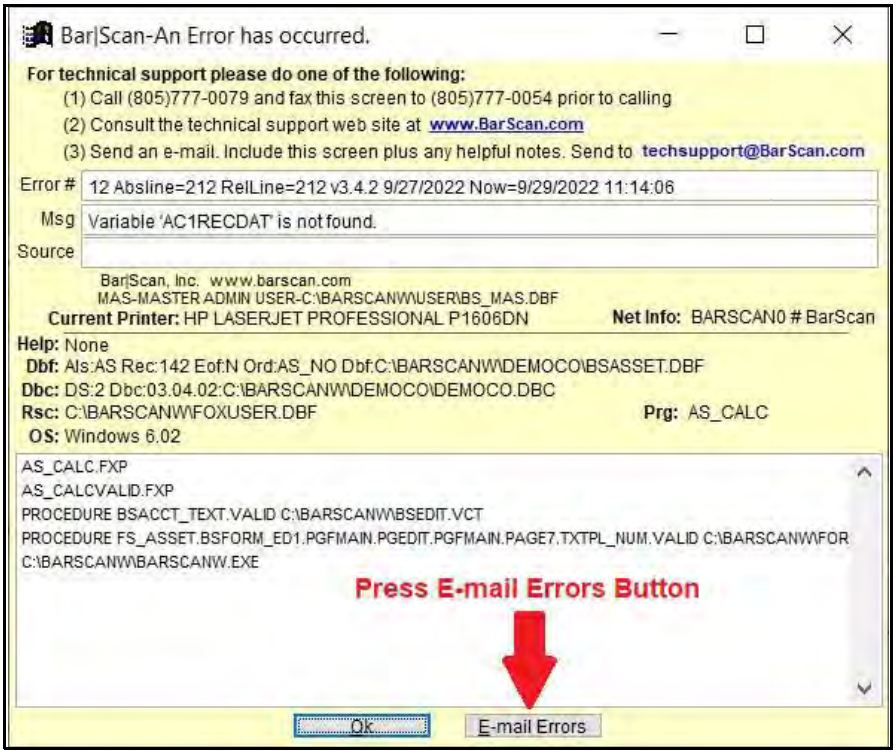
When you add a new company, and sometimes when you upgrade to a newer version of Bar|Scan, you will have to access this table, select all of the companies on your system, and then select OK.

The Table Integrity (combination of Restructure and Reindex) is a maintenance function that should be performed regularly. Bar|Scan will periodically remind you, if you are designated a Master User, when you access the application.

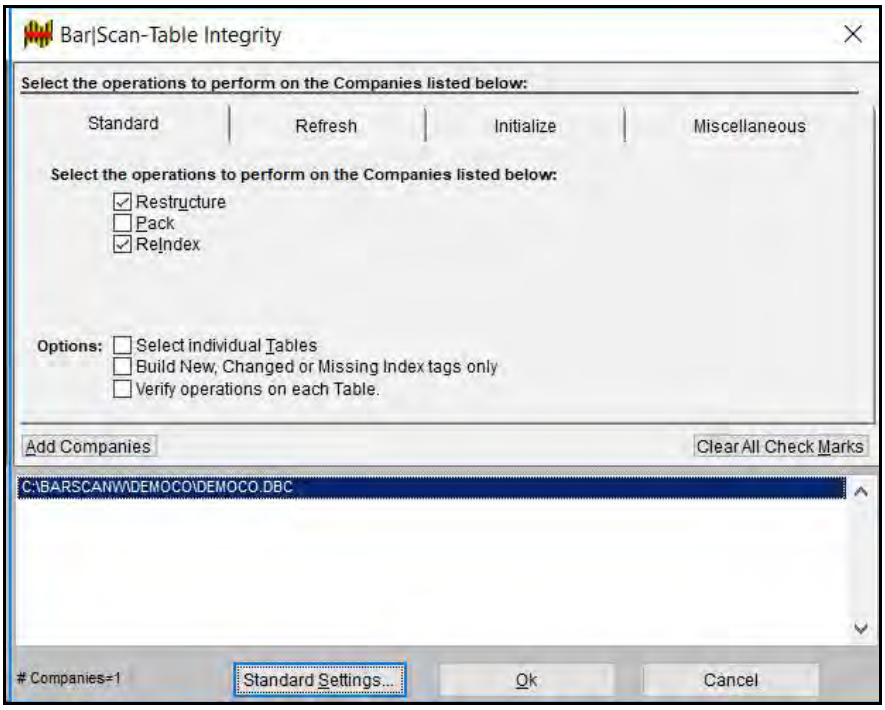
The functions should only be performed when there are no other users accessing Bar|Scan.

You can check for other users' access by selecting Help ...▸, About Bar|Scan for Windows ...▸, Current Users.

Important: You should always peform a Table Integrity when restarting Bar|Scan if your server unexpectedly powered off or you received a Bar|Scan error screen such as the following example.



When you click on the Advanced Settings button you will see a window similar to the one below.



Restructure

This feature should only be selected by someone experienced in the operation of the Bar|Scan system who is famliar with the normal housekeeping functions or when there is an indication that there may be a problem with the system.

These features are also selected to update your data files after you receive and install a program update or after you add, change or remove one or more User Defined Fields (UDFs).

In either case, use of this feature is not required for day-to-day operation of your Bar|Scan system.

Pack

Do not do a pack if you are having other serious problems, contact Bar|Scan, Inc. first for technical support.

This process is used internally by Bar|Scan. You will not notice any difference in the operation of Bar|Scan after you select this item (with one possible exception; it may run faster). **Bar|Scan will notify you when it recommends a Pack.** It is not necessary to perform a Pack right away but Bar|Scan will continue to notify you until the pack is completed successfully.

You will need to use the Pack feature as a regular part of your maintenance of Bar|Scan. You will be moving assets from the Transaction table to the Asset table. When you delete or move items that are stored in your Bar|Scan system, a "copy" is first made of the item, and stored in the system. This item is not visible, but can be restored by a Technical support person, if necessary.

This operation instructs Bar|Scan to eliminate the invisible copies of records that have been moved or deleted.

After selecting one or more companies on this table, you will need to select the Pack operation.

From time to time, you will want to select this item to permit Bar|Scan to remove excess information and condense the data files.

ReIndex

This process is used internally by Bar|Scan. You will not be able to see any difference in the operation of Bar|Scan after you select this item.

Whenever something happens to *lock up* the computer, or you experience a power failure, you will want to select this item to allow Bar|Scan to fix itself.

From time to time, you will want to select this item to permit Bar|Scan to verify that everything is correct and fix any problems.

Refresh Tab

The items listed under Refresh are checkmarked to be refreshed **only** when you have specific problems with tables.

Initialize Tab

This item replaces blank Organization Codes with the referenced Organization Code from the Location table. See Chapter 9, Location Table, in this User Manual for more information.

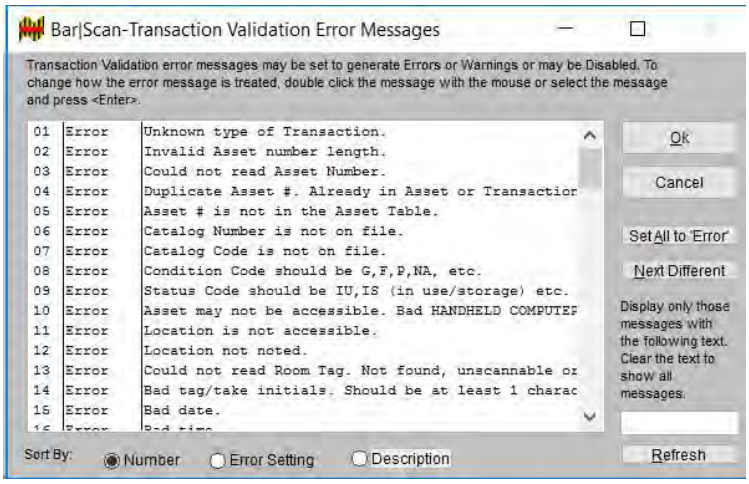
Miscellaneous Tab

The items listed under Miscellaneous are checkmarked only when you have specific issues or problems. Please consult your Bar|Scan representative before selecting these operations. There may be times when you should not perform these operations.

For a full description of the items listed please see Chapter 13, Housekeeping, in this User Manual.

Set Transaction Validation Messages

The next item in the Housekeeping drop down menu is Set Transaction Validation Messages. When you select this item, you will be shown a table similar to the one below.



This table lists all of the items that the Bar|Scan program will check your Transaction table for by default. Some of the items may not be relevant to your data, i.e., some items deal only with quantity inventories, and you may do your entire inventory by the piece.

Bar|Scan uses the information inside of this table when validating the data in your Transaction table. Each of the items listed in this table would appear as an error on the associated Transaction. You can change the severity of the message from an error to a warning, or disable the error altogether. If you need to change the severity of a message, double click the message with your mouse, and the second column will change to say warning or disabled.

Note: Changing the message severity will NOT correct the data. Please discuss your wishes with Bar|Scan technical support before you disable or change the severity of the error of a message.

Other Functions

The Other functions are discussed in detail in the Chapter 13 of this User Manual.

THE IMPORT AND EXPORT FEATURES

The Import/Export features of Bar|Scan can provide you with four important features.

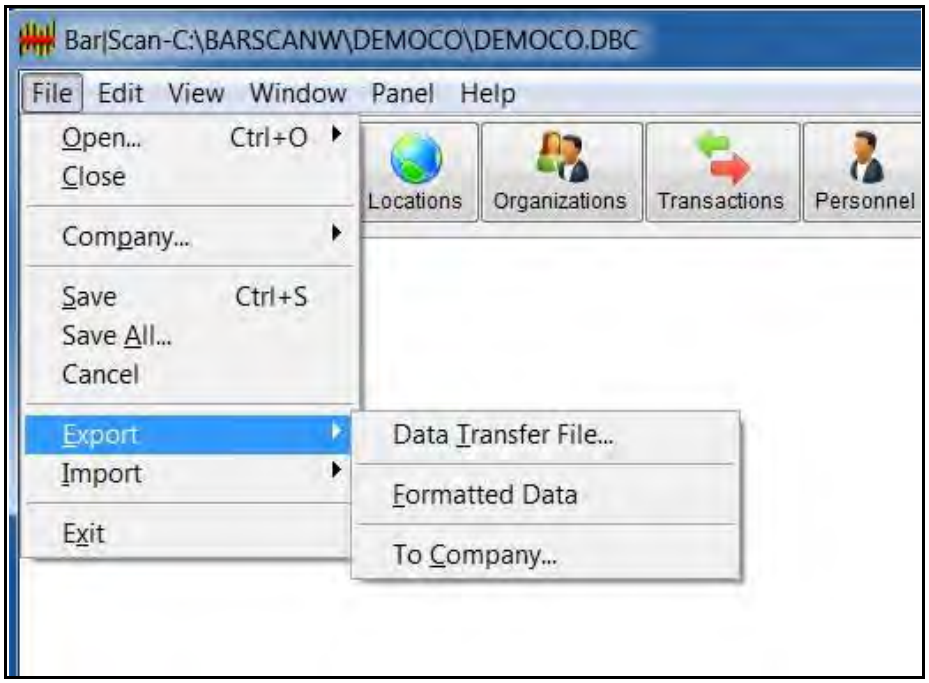
√ The ability to record and export asset information to other systems such as an application using a software discovery tool or software licensing database.

√ The ability to import information into Bar|Scan from another system either as a method to initially populate the assets, or as part of an ongoing process of obtaining and updating Bar|Scan.

√ The ability to export information from one company to another inside of Bar|Scan, if you have a multiple company system. The types of information that you can export includes, but is not limited to: assets, catalogs, locations, organizations, reports, and transactions.

√ The ability to set up and use the **Activity Log** which records *events* as they occur. These events can then serve as an audit trail, or, if desired can be exported. The **Activity Log Export File** created for your use can be in a number of different formats including ASCII comma delimited, Excel, or XML. The **Activity Log Export File** can have any valid Windows filename that you choose.

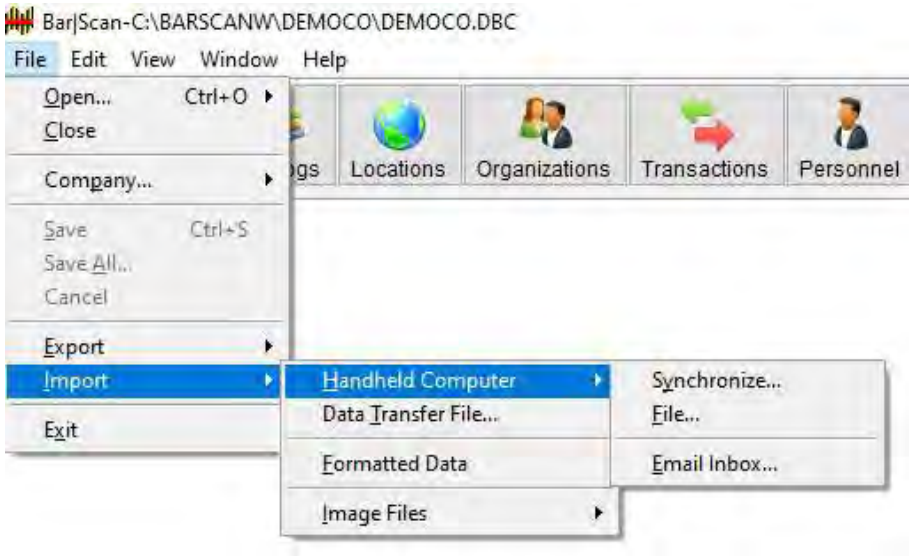
When you select File ...▸, Export from the Main Menu, the following window will appear.



The Export feature will allow you to export a Data Transfer File, to export Formatted Data in a specified format, or in a multi company database, to export a file from one company in Bar|Scan to another Bar|Scan company.

If you choose to export data, using Formatted Data, you will be able to select the properties for your export. Thus, you can for example, select to export using an Excel format for use in an Excel spreadsheet.

When you select File ...▸, Import from the Main Menu, the following window will appear.



As shown above, from this feature, you can synchronize your Mobile Computer, import a file from another Bar|Scan company (if you have a multiple company database), Data Transfer File from another Bar|Scan system, or import data that has been formatted from outside of Bar|Scan (such as an Excel file), or import images (Imaging Module required).

For more information on these features, please see the Import/Export chapter and Appendix B - Imaging of this User Manual.

OPERATING THE SYSTEM

INTRODUCTION

A system designed to keep track of company assets must allow anyone to quickly find a particular asset or group of assets.

Bar|Scan is designed with a specific purpose in mind; i.e., to permit you to quickly and accurately enter new asset information, look up information, and update existing asset information.

Bar|Scan provides the ability to quickly and easily create reports containing specific groups of assets.

This section contains the instructions which will enable you to quickly and easily operate the various features of Bar|Scan.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

OVERVIEW OF BAR|SCAN OPERATING FEATURES

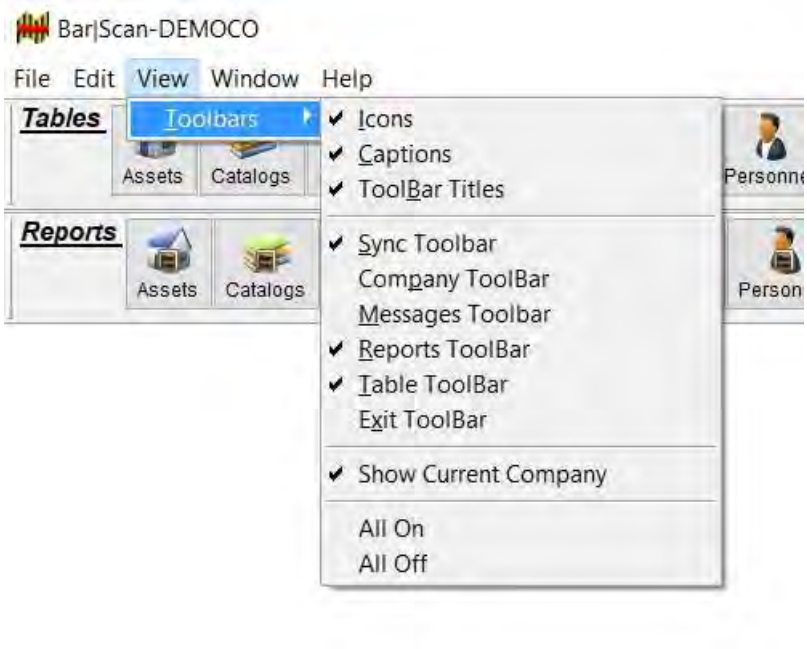
The advantage of Bar|Scan is that even though there are many tables, the tables were designed so that they all have common features that work in the same way. All of the common items on the tool bar work in the same way, no matter which table you work on. So, you can learn to use the add template button in one table, and know that add template button works the same way in all of the other tables.

Bar|Scan was designed to minimize the number of keystrokes needed to enter and work with your data. Many features are available to make entering data less time consuming, and keep it consistent.

As you learn more about your system, you will realize that there are many items that enable you to customize not only your Main Menu, but also the tables within Bar|Scan.

CUSTOMIZING THE MAIN MENU

When you open Bar|Scan, you will be looking at the Main Menu. By default some icons on your Main Menu. These icons are grouped onto Toolbars. The various toolbars can be accessed by going to the View Feature, then selecting Toolbars as shown below.



There are seven different Toolbars available, and they can be displayed using only icons, or icons with Captions.

You decide which toolbars you would like to have displayed on your Main Menu. You can move them around with your mouse by left clicking the edge of the toolbar, holding your mouse button down, and dragging the toolbar to a new location on your Main Menu. If your program is closed properly, the program will remember your setup, according to your logon initials and password, and will display your Main Menu the way you selected.

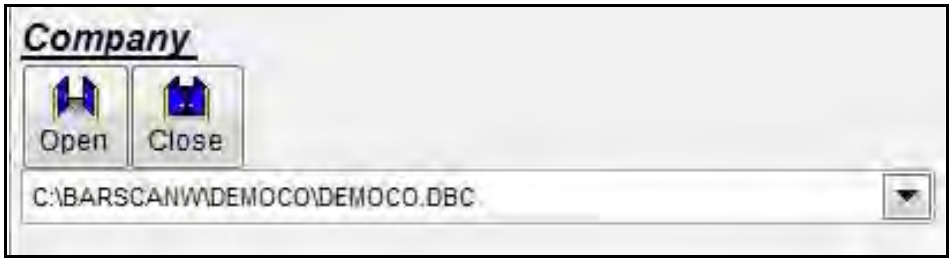
Synchronization Toolbar

The Sync Toolbar is used to quickly access the Synch panel for uploading Mobile Device information into the computer. This Sync Toolbar is shown below.

This Toolbar is only helpful if you synchronize Handheld Computers.

Company Toolbar

The Company Toolbar is very useful if you have multiple databases, and will appear similar to the one below.



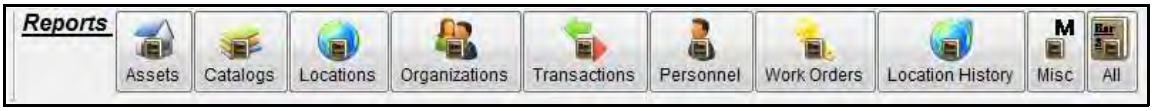
By clicking on the open doors, you can open a new Company (database). By clicking on the closed doors, you can close the current Company. By clicking on the down arrow, you can select any other Company that is listed, as they are open but not active.

Message Toolbar

The Message Toolbar is part of the Scripting Feature in Bar|Scan. The Scripting Feature can control startup settings and actions in a Bar|Scan Initialization File. For example, scripting can login to Bar|Scan, change some information, perform tasks such as print reports and then logout. It can also, for example, perform a task and then inform a user that the task was completed. The Message Toolbar is where this would be displayed.

Report Toolbar

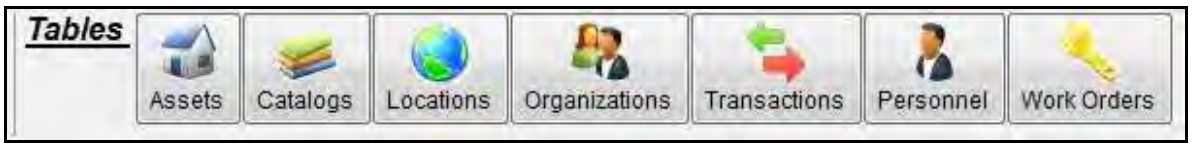
The Reports Toolbar displays icons for the most common reports in Bar|Scan.



This Toolbar has icons for the most common reports. If you are only displaying the icons, and not the Captions as shown above, you can place your cursor over the appropriate icon, and a help balloon will appear to tell you what kind or report the icon is for.

Tables Toolbar

The Tables Toolbar displays icons for the most commonly used tables in Bar|Scan as shown below.



Icons as shown are for the Asset table, the Catalog table, the Location table, the Organization table, the Transaction table, the Personnel Table and the Work Order table. Click on any of the icons on this toolbar, and the appropriate table will open.

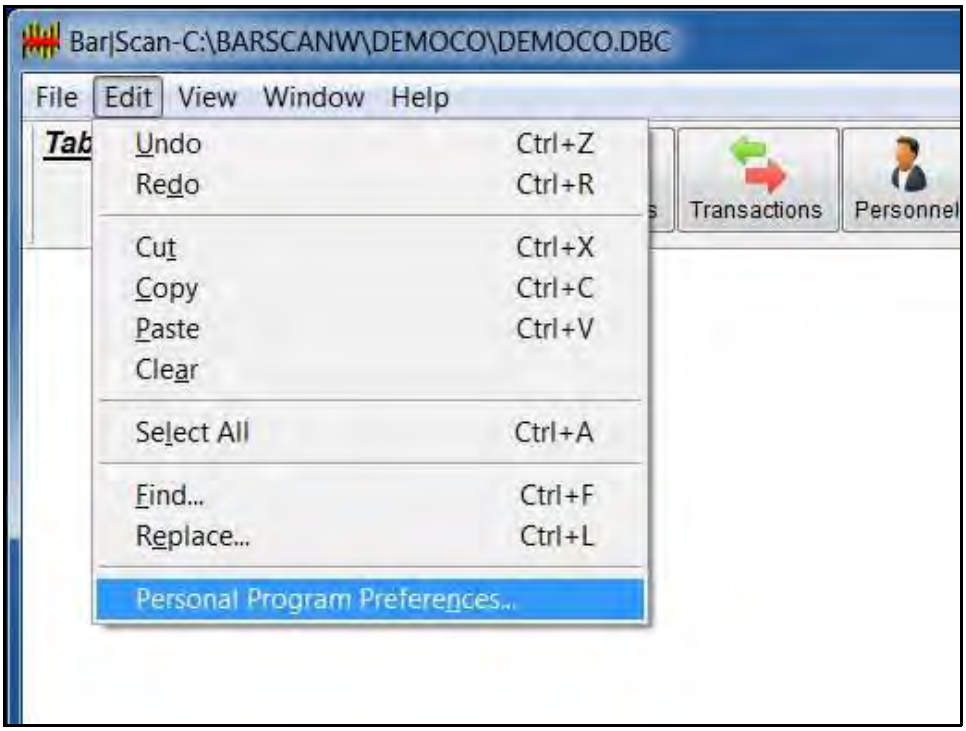
Exit Toolbar

The Exit Toolbar will allow you to close the entire Bar|Scan program, and is shown below.

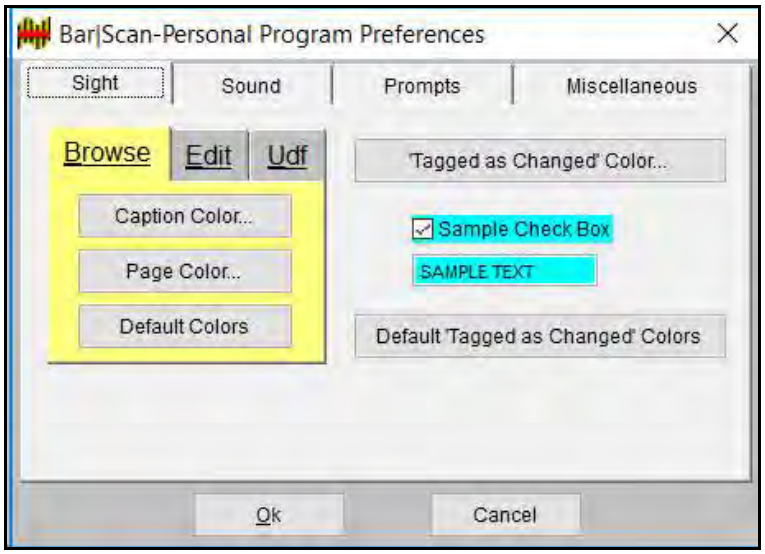
As with many things in a Windows based program, there are several ways to do the same thing. Clicking on this icon would be the same as clicking on the X in the top right of your Bar|Scan Main Menu, and will close the entire application.

Personal Program Preferences

Another way to customize your Bar|Scan sessions is to select your own Preferences. You can do this by accessing the Personal Program Preferences under the Edit feature as shown below.



When you open the Personal Program Preferences table, you will see a table similar to the one below.



Select what color the pages will be, and what color the 'Tagged as changed' items will be. Select sounds, and what events will trigger them. Select what prompts you will see, and if the Company path should be displayed instead of just the name.

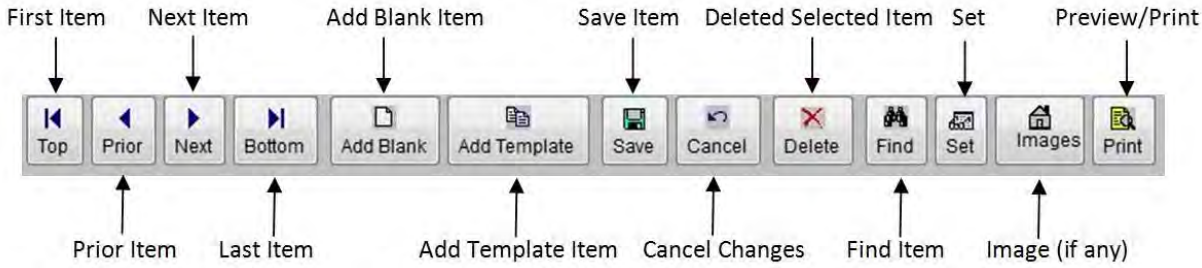
As with the Toolbars, Bar|Scan will remember your preferences according to your logon initials and password.

In addition to these items, Bar|Scan will remember a few of your other choices, but making the choices will not require you to open a table. For instance, Bar|Scan will remember what size your table was, the last time you had it open. It will remember the order you set for the columns inside of the tables.

As you set the tables up the way you like them, Bar|Scan will remember your choices, and try to keep them that way for you. Bar|Scan will even remember the width of the columns that you have selected (with the exception of the first column which represents the table's sort and will open at a defaulted width).

THE TOOLBAR INSIDE YOUR TABLES

Once you open any table, you will see that there is a toolbar at the bottom, and soon you will realize that most of these items appear on every table. The items common to any table are listed on the left, and the few tables that have additional icons will display them to the right of the ones shown below.



Saving Your Work

Bar|Scan makes you take an action to actually enter your work into the system. This allows you to review your work before it is entered into the system and, possibly, overwriting and losing existing information. The Save (Ctrl +S) key combination or clicking on the Save button shown above, actually enters the information into the system.

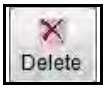
The cancel button also shown above, allows you to abort your activity without disturbing existing information in the system.

Defining an Order and Filter: - The Set Feature

The SET feature allows you to sort a group of items which will be displayed in a Browse window, or a selected group of items which will be printed on a report.

As the number of assets on the system becomes very large (20 or 30 thousand is common), scrolling through Browse windows to find a particular item could become very time-consuming. The SET feature "orders," "filters," and displays items which are based on your current task.

Deleting an Item: - The Delete Feature



The DELETE feature allows you to delete an item which is being displayed in a browse window.

Because it is easy to sometimes press the wrong icon on a toolbar, and because deletions are so final, we have made it a little more difficult to delete items. To delete an item, or a range of items, the **items must be RANGED** first. Once the desired items are ranged (accomplished by pressing the F4 button to begin and the Enter key to end the ranging process) the items can be deleted. If the items are not ranged first, and you select the delete icon, you will see a message saying nothing currently selected to delete.

Showing an Asset, Catalog, or Signature Capture: - The Image Feature

The IMAGE feature allows you to view either an asset or catalog image as well as a signature capture or image associated with another field for the item which is being displayed in a browse or edit window.

Bar|Scan can display single or multiple images for the same item.

The Imaging feature is explained in more detail in *Appendix B - Imaging*.

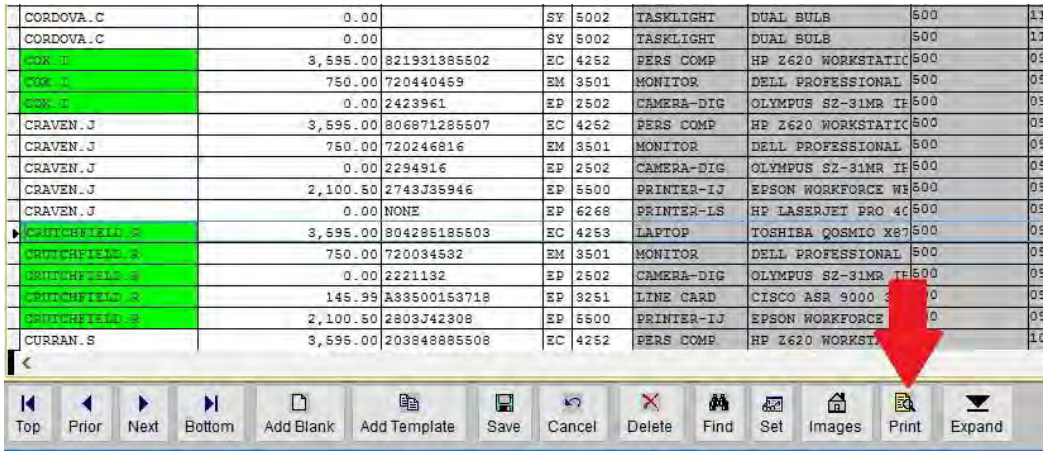
Print Preview: - Printing a Selected Report

On most screens where the user can add, edit or delete information there is a Report button. This button allows the user to print a report directly from the screen. This button has a few special features directly related to the fact that it knows what screen it is on.

Clicking on the button will display the default report to the screen in preview mode. The user can change the default report at any time (see below).

The user can change the default report by right clicking on the button and selecting the desired default report. The list of reports displayed are those specifically designed for the current screen, e.g., only Asset reports will be in the list on the Asset screen report button. Of course, if there are no reports that apply to the current screen there will be nothing to display in the list. In this case you will have to create an appropriate report in the Report screen.

The Print Preview is capable of working with the Range Feature (F4). Right-click the Print Icon to select or change the report. Next, range the items that you wish to print. In the following example, only the eight items highlighted in the Range will print.



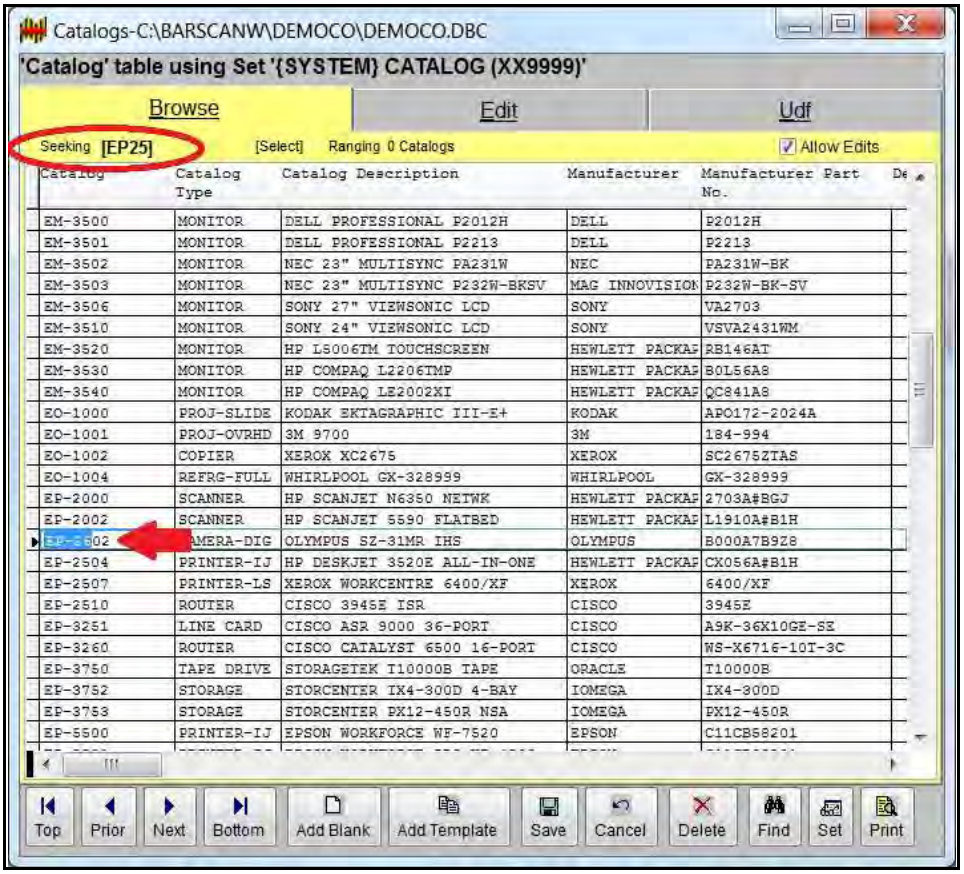
However, any existing filter in the report that you have chosen will also apply. Therefore, it is important to review and make sure that the filters that exist in the report will not affect your range in an adverse way. For example, if the report already had a filter “Catalog Category = SE” then nothing would print since the items select in the example are have Catalog Categories not equal to “SE”.

Expand or Collapse - The Expand or Collapse Feature

There are Several Panels in Bar|Scan where lists or history might be displayed. Sometimes many records can be accumulated, more than can displayed on the Edit Tab. Clicking on the button expands or collapses the screen so that more information can be displayed.

Tracking the Characters You Type - The Seeking Feature

Bar|Scan analyzes the characters you type as you type them, and moves the highlight bar to the corresponding area in a look up or browse window. This feature makes it easy to duplicate all or a portion of an existing entry thereby speeding up the process and reducing typographical errors.



In this example, the cursor is placed at the far left column, before the first character. Then, EP was typed. Immediately above the Catalog column, the item "Seeking" is displayed, and beside it, in brackets, are the characters that were typed.

The highlight bar on the Catalog column displays the characters found, in the order that they are typed. First the system looks for the first E match, next the first EP, as it is being typed. If a letter or number is not found, the cursor will stay on the last character that was correct, signifying that no like item was found in the list.

Note: In Personal Program Preferences, you can select to have a beep signify an item can not be found.

Cursor Movement Keys

Bar|Scan permits the use of all cursor movement keys to easily access the different displays. Several other special keys are also used to move the cursor. These keys operate in the same manner as many of the popular personal computer software packages so that you can operate Bar|Scan without having to relearn the use of these keys.

The Function Keys

Bar|Scan has assigned common activities to several of the Function Keys. Where possible, activities common to other personal computer software packages are assigned to the same Function Keys (such as F1 for Help, and Ctrl + S for Save).

Abandoning Your Work

The X button at the top right of a window or the ESC key is used to leave (escape from) what you are currently doing and return to the previous menu or screen. Use either of these methods of closing a window after you have completed your activities.

However, if you have pending additions or changes, you will be prompted to save or cancel the pending additions or changes before you will be allowed to close the open window. Simply click on the desired button on the tool bar, to Save or Cancel the pending additions or changes. Once this has been completed, you may close the window using the method of your choice.

CURSOR MOVEMENT

Being able to quickly reposition the cursor or highlight bar is essential to any system which contains a very large number of different records.

Bar|Scan permits the use of the normal cursor movement keys; i.e., the arrow keys, Page Up and Page Down, and Ctrl + Home and Ctrl + End. In addition, the TAB and SHIFT TAB keys, the SPACE BAR, and the ENTER key can be used to reposition the cursor or highlight bar.

Bar|Scan monitors characters as they are typed and repositions the cursor or highlight bar based on the character.

The Arrow Keys

The simplest way to move the cursor is with the arrow keys: right, left, up, and down.

When a panel or a look up window is currently displayed, the arrow keys will move the highlight bar up and down. The right and left arrow keys become the same as the up and down arrow keys respectively.

Prior (Page Up) And Next (Page Down) Keys

The Prior (PgUp) and Next (PgDn) keys, as well as the two buttons displayed above are used on the look up windows to display the next or previous page of items from the list.

PgDn will move the cursor to the top of the next page, i.e., the highlight bar will be positioned on the item following the last item on the currently displayed list of items. PgUp will move the highlight bar to the top of the previous page.

If you are on the Edit tab of a table, PgUp and PgDn will display the next or previous record in the table.

Top (Ctrl + Home) and Bottom (Ctrl + End) Keys

The Ctrl + HOME key combination will move the cursor to the first item in a table, a look up window list, or a panel. Ctrl + END key combination positions the cursor on the last item. The two buttons shown at left side of this section, work in a similar fashion.

The TAB and Shift TAB Keys

The TAB and SHIFT TAB Keys operate similarly to the arrow keys when you are at an Entry Screen or a Menu, i.e., TAB will move to the next item and SHIFT TAB will move to the previous item.

FUNCTION KEYS (F3 THROUGH F5)

Bar|Scan provides the use of several Function keys. These keys may be pressed at any time to display the information or initiate the activity provided by the key. If the activity is not allowed or there is no information to display, NOTHING will happen.

F3 - Next Screen

Some panels are not large enough to cover all of the information for a table, so additional panels are used. These panels are signified by tabs on the table. These tabs can be accessed by using the F3 (Next Screen) key.

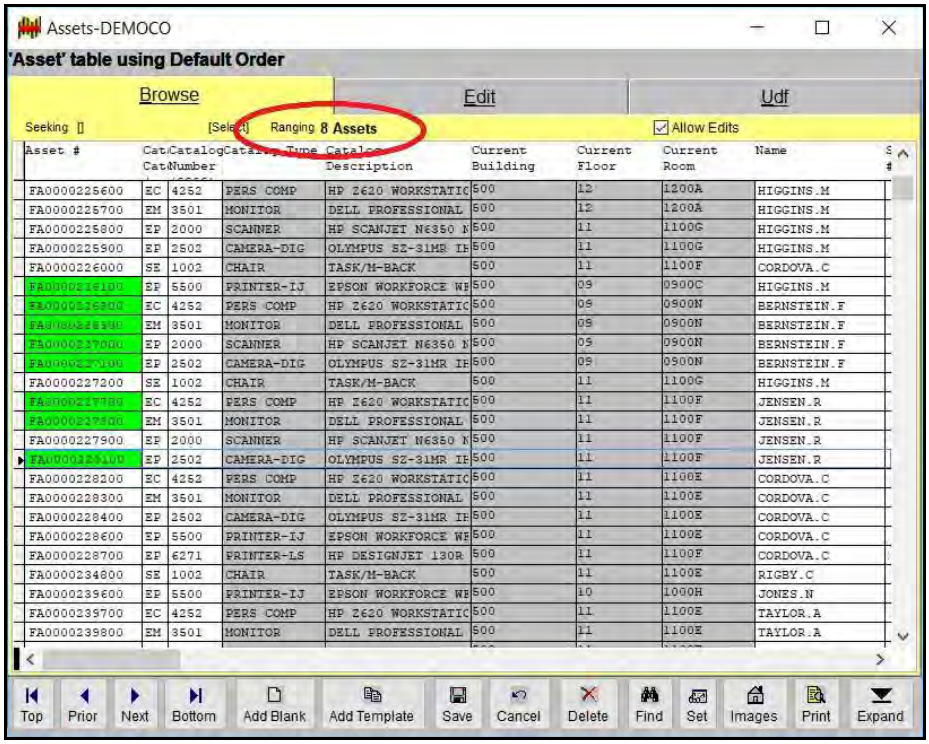
For instance: When you open the Location Browse tab, the Edit tab can be accessed by pressing F3.

If there are additional tabs on an Edit panel, F3 will take you to the next tab. For instance, on the Asset table, there are nine additional tabs, with Asset open by default. If you press the F3 key, the next tab, Inventory will be displayed. If you press the F3 key again, the third tab, Accounting will be displayed.

F4 - (Range)

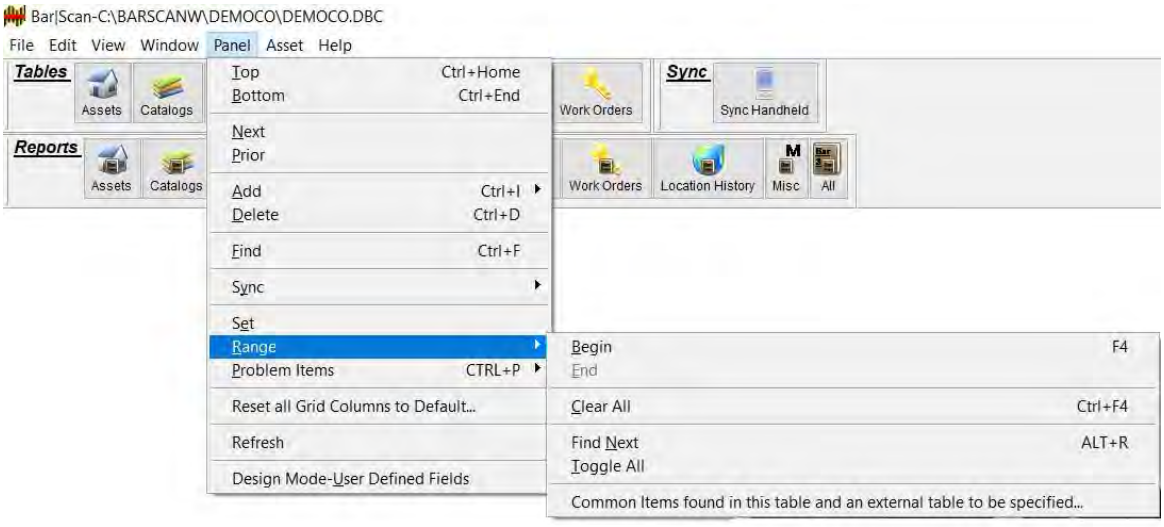
The F4 (Range) key can be used when defining a range of items on a Browse panel. F4 will only operate when on a Browse panel. If pressed at any other time, F4 will have no effect.

In order to define a range of items, move your cursor to the first item you wish to include, and press F4. The first item should change color. The default range color is green. Press the up or down arrows to the last item you wish to include, all of the items should now have a green background. Press the Enter key to end the Range. The Browse panel will have a message saying how many items are included in the Range as shown below.



Then, if you would like to range more items, go to the first item you want to range, again press the F4 key, and then the arrow keys to select the items that you want, and then the Enter key to end the Range. **Hint:** You can also add items to a range by double-clicking the item, in the first column, with your mouse. To cancel the range, press the Ctrl + F4 key combination.

Note that you may also begin, end, or clear a Range from the Main Menu, by selecting Panel . . . ▸, and then from the drop down list select Range . . . ▸, Begin, End, and/or Clear All as shown below.



Tip 1: Double clicking an item in your browse window will also cause it to be ranged.

Tip 2: When you are in the process of ranging several items that are not consecutive, you press F4 and Enter. Go to the next desired item, press F4 and Enter. If you press the F4 and accidentally range the wrong item, you can press the F4 button again, and that last accidentally ranged item will no longer be ranged.

Tip 3: Use Range Next when you wish to highlight a large group of items.

The Last item “Problem Items” can be helpful in Technical Support.

The “Common Items found in this table and an external table to be specified” feature allows you to range items in any BarScan table based on data in an external file. The external file must be in .CSV or .DBF format and the field must be a key field in BarScan, e.g. Asset Number, Room Tag, etc.

Here is an example scenario. You have an Excel file with a large list of Asset Numbers that you wish to delete in BarScan. You do not want to delete all of these assets manually. This feature will allow you to delete them quickly.

To begin, the Excel file column title must be the same as the BarScan field name, in this case asset_no. Make sure that the column title is correct.

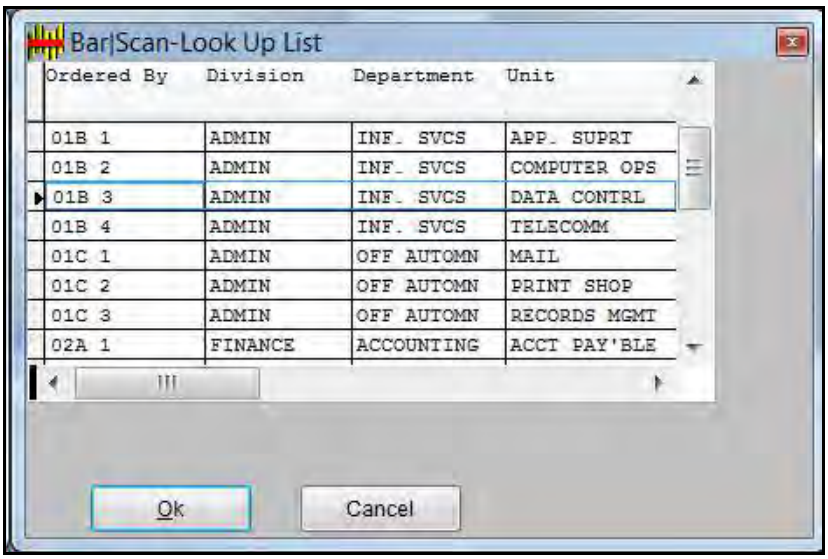
Next, convert the XLSX file to a CSV file format by using the Excel export feature. Make sure the CSV file is located where BarScan can access it such as your desktop and make sure that the CSV file is not open.

Start BarScan and open the Asset Table. Then from the Main Menu select the 'Common Items found….' feature. BarScan will ask for the location of the CSV file. Navigate and choose the file. BarScan will next highlight all Assets that match the list in the CSV file in a Range. You can now delete the items in the Range.

F5 - Look Up Window

This feature creates a window which lists information currently in the Bar|Scan system. When you are on a field and you need to enter data, you may right click or press the F5 key, and you will see a dialog box like the one below.

If you choose **Look up Value**, a look up window will appear to show you entries that are currently being used in the system, or a list of available selections. A sample look up window is displayed below.



Click the item that you want to place in your field, and select the OK button.

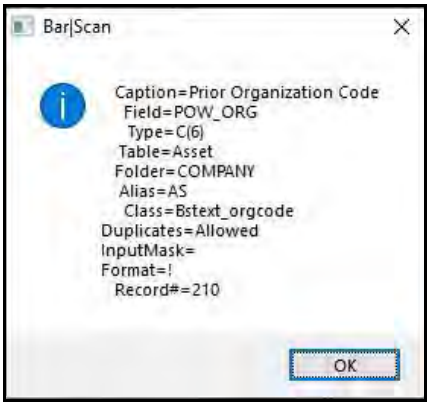
Some of the Look up Windows will allow you to right click and resort the information shown.

Restore Original Value is valuable when you have noticed that you do not want to change a field, but do not remember exactly what the field said prior to your change. This is sort of an "undo" one field at a time. As when you make a lot of changes before saving, clicking the Cancel Changes button on your toolbar will cancel all of the changes since your last save.

Mark as Changed is a useful tool for changing all of the items in a range. When you have selected a range of items in order to change a particular field, it may be that some of these records do not need to be changed. For instance, you have 25 records, and most of them say IU for Status, and five of them say IS, and you want to have all of them say IS. You can range all 25, and if the one that is displayed already says IS, place your cursor on the IS field, right click and select Mark as Changed. This will highlight the field as though you have changed it, and will allow you to send that change to the rest of the 25 records as one global change.

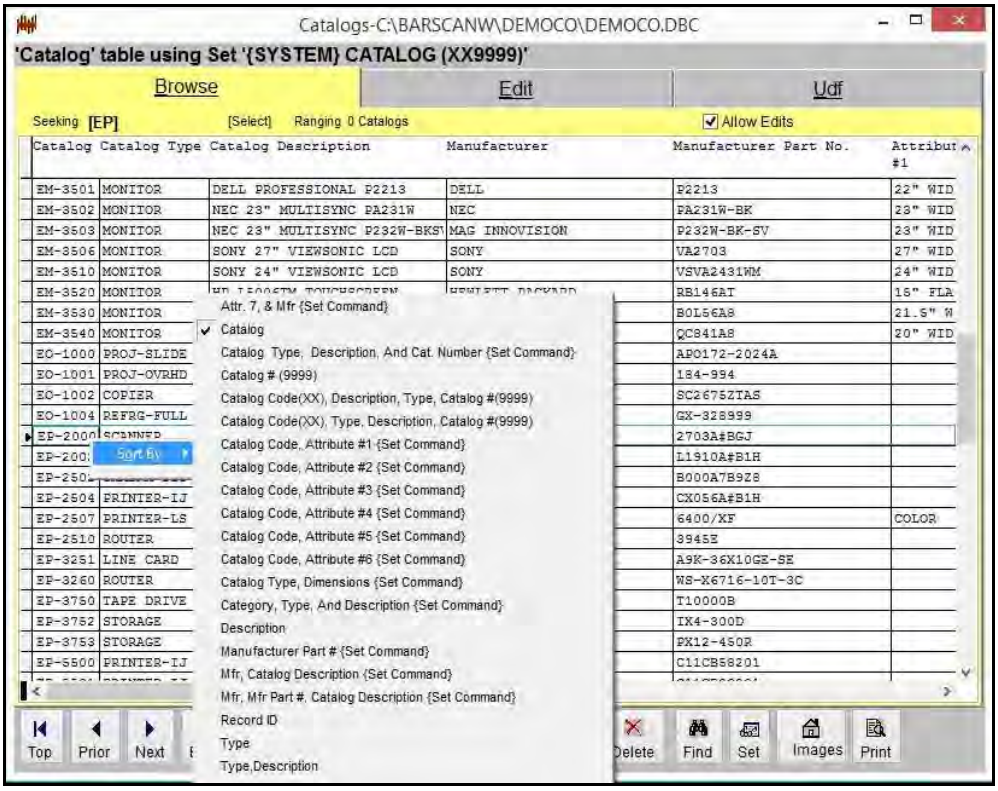
Mark as Unchanged is just the opposite of Marked as Changed. You may want to use this when you want have changed several items on purpose, and then make a change to a field by accident. Marking the accidental change as Mark as Unchanged will allow you to save the first legitimate changes, without saving the accident.

Field Information can be used to determine the properties of any field in Bar|Scan. As displayed in the example below, the Organization Code field is a Character Field of 6 in length. Because the User Defined Fields Module and rename and/or stretch and shrink fields, you might need to rely on this information when designing an import or export.



Changing the Browse Window

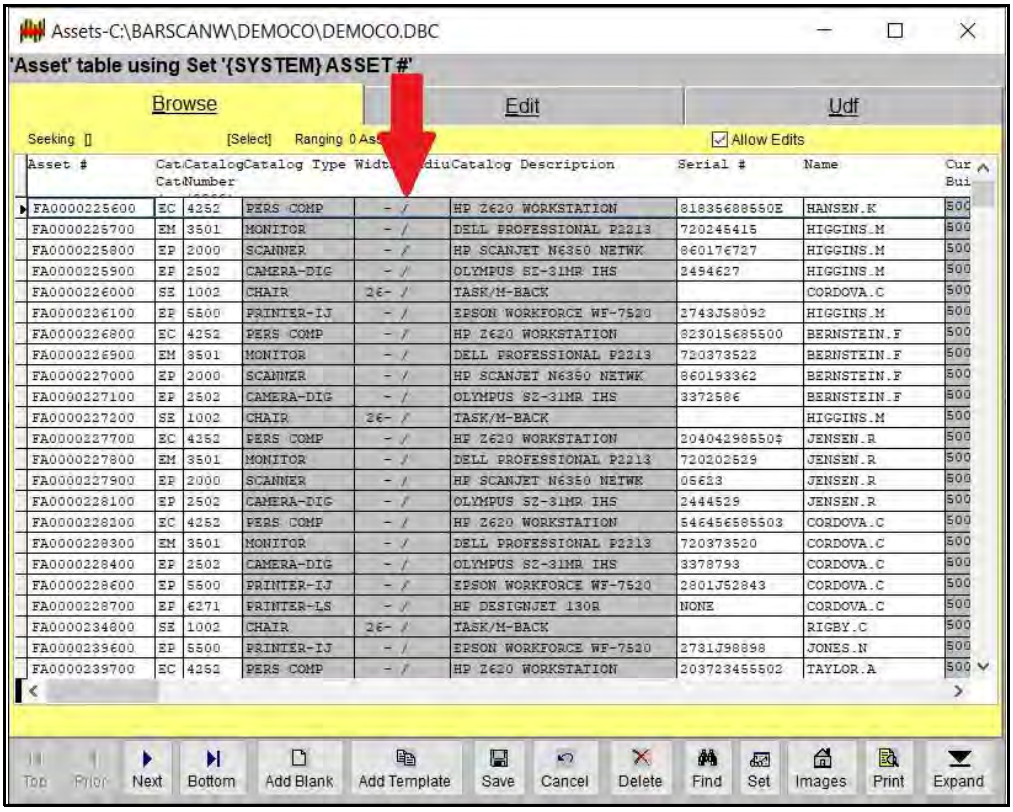
While on any Browse window, you can use your mouse to right click on the first column as shown below.



When you right click on the first column the words “Order By” will appear, and if you place your mouse on these words, a drop down list will appear, allowing you to **sort the information** on this table using any of the Sets that have been created.

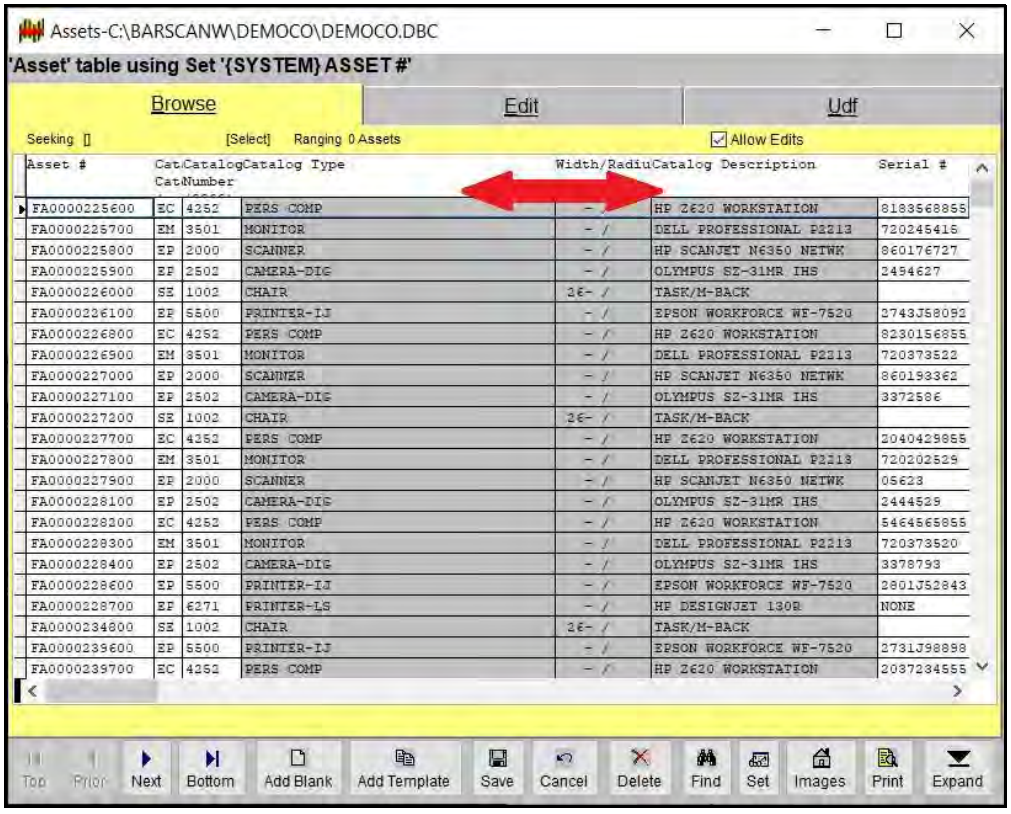
Important: You can right click and select Order By on any window, even some of the look up windows. If you have selected the Set button from the tool bar, and have chosen a set that had a filter, i.e., Bad Transactions Only, right clicking will **not erase** that filter, but allow you to re-sort the data.

You may also **change the order of the columns** in a Browse window. Simply place your mouse on a column header, and it will turn into a thicker black arrow. Left click and hold the mouse button down, and drag the column to the left or right.

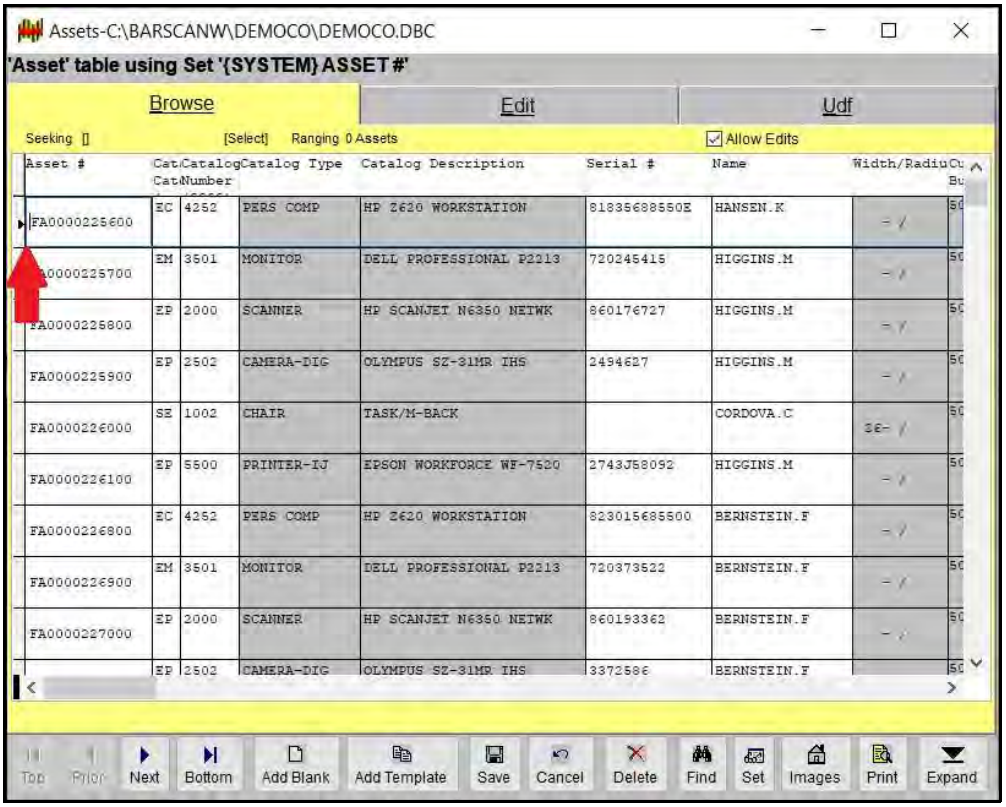


The example shows the column Width is ready to be dragged to the left or right.

You may also **change the width of a column** by placing your mouse on the line that divides the columns (still in the shaded header area). When the mouse pointer changes into a plus shape with a double arrow, you may left click, hold the mouse button down, and drag the edge of the column to the left or right.



You may also **change the height of a row** by placing your mouse on the line that divides the rows (in the shaded area). When the mouse pointer changes into a plus shape with a double arrow, you may left click, hold the mouse button down, and drag the edge of the row up or down.



You can also display images on the Browse window as shown below.

Images can be associated with both Assets and Catalogs. Optionally they can also be signature captures or associated with other fields. To display an image, right click on either the field's Column Header. If you wish to view both the image and the data, add the column to the Browse window twice. You will have to expand the how to see the image as shown in the example above.

You can also change the font on the Browse window as shown below.

If you right click in the very left hand box you will see an item to change the font on all columns. Right Clicking on any title will allow you to change the font on that column separately.

THE INSERT KEY

The Insert key, when used while in the data entry mode, will change your cursor from typing mode to type over mode.

CONTROL-I & CONTROL-D KEYS

The Control + I key combination is the keystroke for the Add function. Then, you will need to select whether you want to add from a Blank or from a Template.

The Control + D combination is the keystroke for the Delete function.

USING THE SPACE BAR WITH DATA ENTRY

Do not use the space bar when entering information.

Using the space bar for "padding" is not necessary to "align" information that you enter. As a matter of fact, the space character is a valid bar code character and will produce a **different** bar code for items proceeded with spaces than those without spaces.

Bar|Scan will always align all numeric and alpha numeric information properly.

It will also properly order numeric fields. For example, total cost of $501.00 will always come after total cost of $500.00.

In a very few circumstances, the space character may be desired. For this reason Bar|Scan will allow you to pad with spaces.

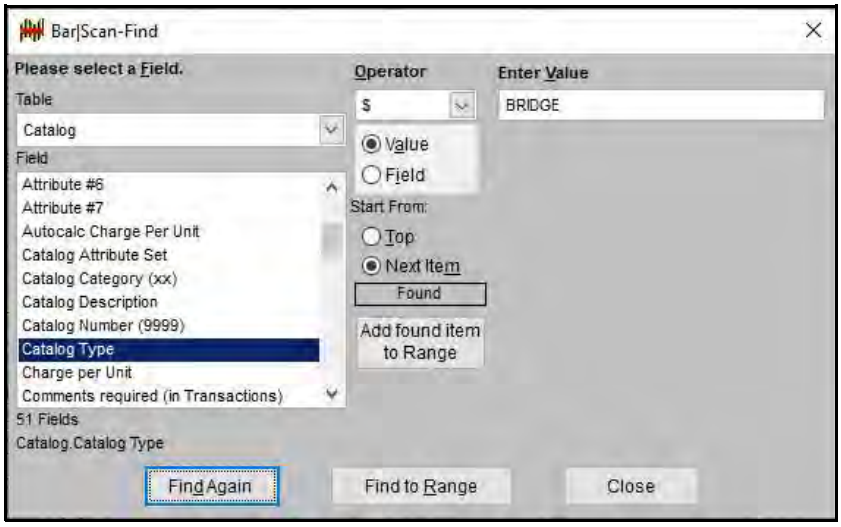
CONTROL KEYS

Control key shortcuts allow you to choose certain menu options without displaying the menu look up. All you need to do is press the control key combination which is listed next to the desired option on the menu look up. Control key shortcuts are listed below.

Ctrl + A - Select All
Ctrl + D - Delete
Ctrl + I - Add
Ctrl + O - Open
Ctrl + S - Save Modification
Ctrl + Home - Top
Ctrl + End - Bottom

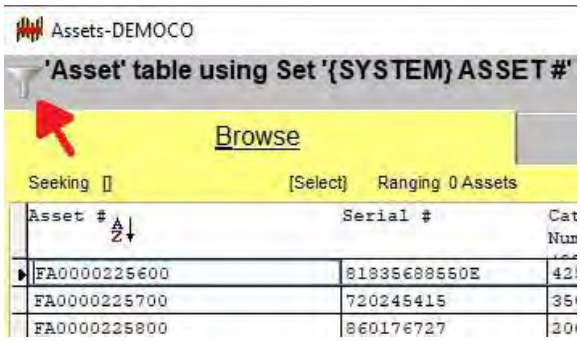
These Control Keys are time savers and may be useful to you if there are times when you will not be using a mouse.

If you have any table open besides the Main Menu, and you select **Ctrl + F**, you will see a find panel that looks similar to the one below.



This is the same panel that you will see if you click on the Find button on the tool bar.

NOTE: The Find feature will be affected by filters. There are several places where filters can be added in BarScan to change the items displayed in a Panel. The two most common are filters in the SET Command and filters in the User Table. BarScan alerts you on any Panel that has an active filter in place. BarScan will display a small filter icon at the top left of the Panel as shown in the example below:



Note that BarScan Administrators (Master Users) are not affected by User Filters.

There is one exception. If you are on a text file, such as in Work Orders on the Notes area, and you select **Ctrl + F** combination, you will see the following.

This feature may be helpful when you need to search for a word or words in the dialog area. This box will not be available unless you are on a text area.

USING A MOUSE - RECOMMENDED

Bar|Scan is designed for use with a mouse or a standard keyboard. All Bar|Scan actions can be executed by either the keyboard or the mouse.

Although the program does not require a mouse, we recommend it for its ease-of-use. With the click of a button, a mouse can accomplish the equivalent of many keystrokes on the keyboard**.**

If you have a mouse attached to your computer and have your mouse installed, a pointer will appear on your screen when you start the program. The pointer is an arrow.

When you roll the mouse, the pointer moves. You can position the pointer by moving your mouse. Clicking your mouse button will execute the action your pointer is resting on.

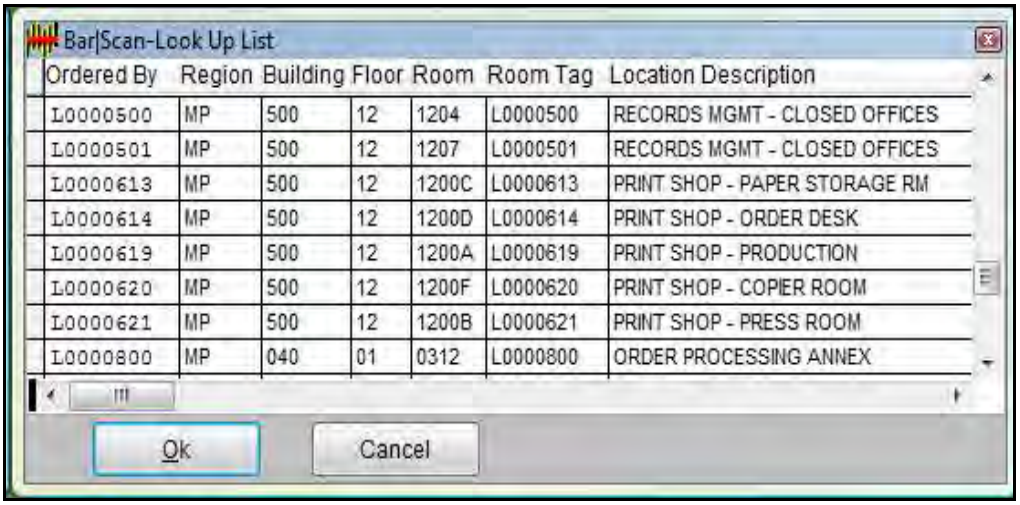
Controlling the Look up Windows with the Mouse

Most of your work will start with the display of a table. The information contained in a table can be changed by using a look up window.

The look up windows can be manipulated in several ways. In addition to opening and closing the look up windows, you can move and size them easily by using your mouse.

To move a look up window, place your mouse on the title bar, left click and hold the mouse button down while you drag the window to a new position.

A sample look up window is displayed below.



Like most windows, you can resize these windows by placing your mouse at the edges of the window. When your mouse pointer changes to a two headed arrow, hold down the left mouse button and drag the mouse to where you want the edges to be.

You can close the look up window by clicking on the X in the top right-hand corner, or click on or select the Cancel button.

To Open a Panel:

A panel can be opened in a variety of ways. A panel is opened by clicking on the File button, then by selecting the necessary items from the drop down menu, or by pressing the Ctrl + O key combination will automatically open a drop down list for you to choose from. When you open a panel, it becomes the front most panel on your screen.

To Close a Panel:

When a panel is closed, you can no longer see its contents. To close the active panel, press the X at the top right corner, or select File, and then Exit, or finally by pressing the ESC key.

To Move a Panel:

To move a panel to a new location, position the pointer on the panel title bar (at the top of the panel), hold the mouse button down and drag the panel. When the panel is in its new location, release the mouse button.

To Size a Panel:

To change the size of a panel, click on the "Maximize" in the top right corner of a panel. It should look like one or two windows. Or, move your mouse to the outside edges of the panel and when the mouse pointer turns to a two-headed arrow, hold down the left mouse button, drag the edges until the panel is the desired size, then release the button.

There may be times when you need to see more of a look up window than will fit on your monitor's screen. Bar|Scan gives you the ability to make the look up larger than you may be able to see at one time.

In order to use this feature, place your mouse on the title bar of the look up window. Press your left mouse button, and hold it down, while moving the mouse to the left. This moves the entire look up window to the left.

Now, with the look up as far to the left as possible, move your mouse to the right outside edges of the panel and when the mouse pointer turns to a two-headed

arrow, hold down the left mouse button, drag the edges until the panel is the desired size, then release the button. This process allows you to view parts of the panel that used to be hidden.

To Maximize a Panel:

To Maximize a panel, click the Maximize button in the upper right corner of a panel. The panel expands to fill the screen. To return the panel to its previous size, click the Maximize button again.

To Scroll a Panel:

"Scroll Bars" are located along the right edge of panels. Click the arrows at either end of the "Scroll Bar" to move through the contents of a panel a little at a time. Click one time in the page up or page down region to move up one page or down one page.

THE BAR|SCAN OPERATING FEATURES

The following section describes how to operate the various features of Bar|Scan. You will want to become familiar with these features before you attempt to use the System.

THE BAR|SCAN LOOK UP WINDOW

Bar|Scan is designed to minimize the number of keystrokes required when you operate the various features.

Bar|Scan eliminates keystrokes by featuring many look up windows that provide specific information and choices appropriate to what you are doing at that time.

A look up window will contain either a list of choices from which to select, a menu of different activities, or a list of information currently contained in the system.

A look up window containing a menu requires you to move the highlight bar to one of the activities and press ENTER. You may also press ESC to make NO choice and return to the previous screen.

The Feature Category “Panel” has a pull down where you will find the Range feature, or you can select the F4 “Range” key to select a group of items from a list.

Look up Windows Containing Multiple Columns

Many of the look up windows contain several columns of information. One of the columns, usually the first column, will be active. The other columns are provided for your information and reference.

To select an item, click on it with your mouse, or move the highlight bar to the desired item using any of the cursor movement keys, and press ENTER.

Moving the highlight bar is accomplished by pressing the four arrow keys, the PgUp and PgDn keys, and the Ctrl + HOME and Ctrl + END keys, (or you may use the mouse). See the subsequent section on "Cursor and Highlight Bar Movement Keys" for some more information on the use of these keys.

The highlight bar signified by a bold box with the ▌ to the left of it shows the item that is currently selected. It will move in accordance with characters you type. See the subsequent section on "Tracking the Characters You Type" for more information.

To close the window, click on the X at the top right corner, or the ESC key may be pressed to be returned to the previous screen.

Range (Function-4 Key)

The range feature permits you to select and mark a group of items from a look up window list.

The Range feature works only when you are permitted to select a group of items from the list displayed in the look up window, or on a browse panel.

Select a group or range of items from the list as follows:

✓ Move the highlight bar to the first item of the group and press F4 (Range) key to highlight the first item.

✓ Move the highlight bar to the last item of the group and press ENTER.

Bar|Scan will highlight all of the items in the group you have selected.

Moving the highlight bar is accomplished by using the mouse, pressing the four arrow keys, the PgUp and PgDn keys, and the Ctrl + HOME and Ctrl + END key combinations. Please look at the subsequent section on "Cursor and Highlight Bar Movement Keys" for some more information on the use of these keys.

The highlight bar will also move in accordance with characters you type. See the subsequent section on "Tracking the Characters You Type" for more information.

TRACKING THE CHARACTERS YOU TYPE - THE SEEKING FEATURE

This is one of the most important timesaving features of Bar|Scan. It is available when your cursor is placed in the far left or very **first** position (prior to the first character) of a field in a column or look up window. If your cursor is not in the first position, this feature may not work properly.

Generally, Bar|Scan will analyze the characters you type as you type them, and, depending what you are doing, automatically select a menu choice or display information in accordance with the characters entered.

If you are selecting a menu choice, Bar|Scan may automatically make the choice for you when enough characters are entered to distinguish it from all other choices.

This feature is even more helpful when you are entering (or changing) information on one of the Bar|Scan Entry panels. You may wish to view a look up window listing all of the information in the system for that particular item. This is done by using the look up window key (F5) or by right clicking on a specific field, and then select Look up Value. The highlight bar will move through the list in accordance with the characters you type.

If the highlight bar, signified by a bold rectangle with a | to the left of it, is over an item that contains the rest of the characters you want, you can just press the Enter key, the rest of the characters will be entered for you.

The combination of typing characters, moving the highlight bar in the look up window, and pressing the right arrow key to enter characters provides a quick and accurate method for making your selections and entries.

The explanation of this feature is considerably more complicated than actually using it. We urge you to experiment with its use; you will find it simple to use and will save you a considerable amount of time.

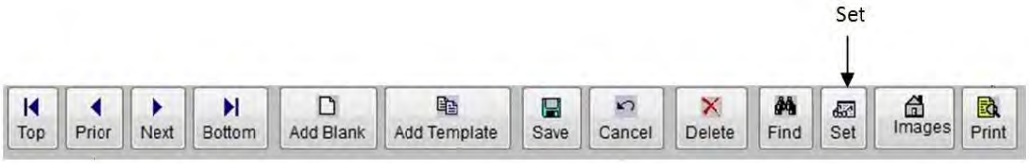
For example: When viewing the Catalog table, place your cursor on the Catalog Code field and right click or press the (F5) key. Select Look up Value from the menu list that will appear, a look up window appears for the item. The look up window for the Catalog Code has many unique choices available and most choices start with a different letter. Typing the first letter of the desired choice will cause Bar|Scan to automatically go to the first choice starting with that letter.

Another example: right click on the Manufacturer's field or press the (F5) key, and then select Look up Value, a look up window appears for the item. Bar|Scan will follow your keystrokes by highlighting existing similar items. For instance, if you are entering a manufacturer and you type the first two or three letters the highlight bar in the window showing the list of manufacturers will move to the first occurrence of those two or three letters. If the correct manufacturer appears in the window you can move the highlight bar to it and press ENTER to select the manufacturer. Further keystrokes are not required.

DEFINING THE ORDER BY - THE SET FEATURE

As the number of assets in your system grows, it will take an increasing amount of time to find a particular asset or group of assets. To solve this, Bar|Scan provides the SET feature which enables you to determine the order in which the information will be displayed, and to specify a particular group of assets and "filter" out the rest.

SET is provided as a part of all Query and Browse screens. Select SET by pressing the Set button on your tool bar as shown below.



Use this feature to change the item(s) that the information in browse panels is sorted by. If your want to sort the items on a browse panel by a specific field(s), which is not listed in the previously created Sets, you may add your own Set.

Bar|Scan provides many sorting order levels. However, most Sets are created with only one, two, or three levels specified. We suggest you experiment with several different orders and levels to become familiar with this feature.

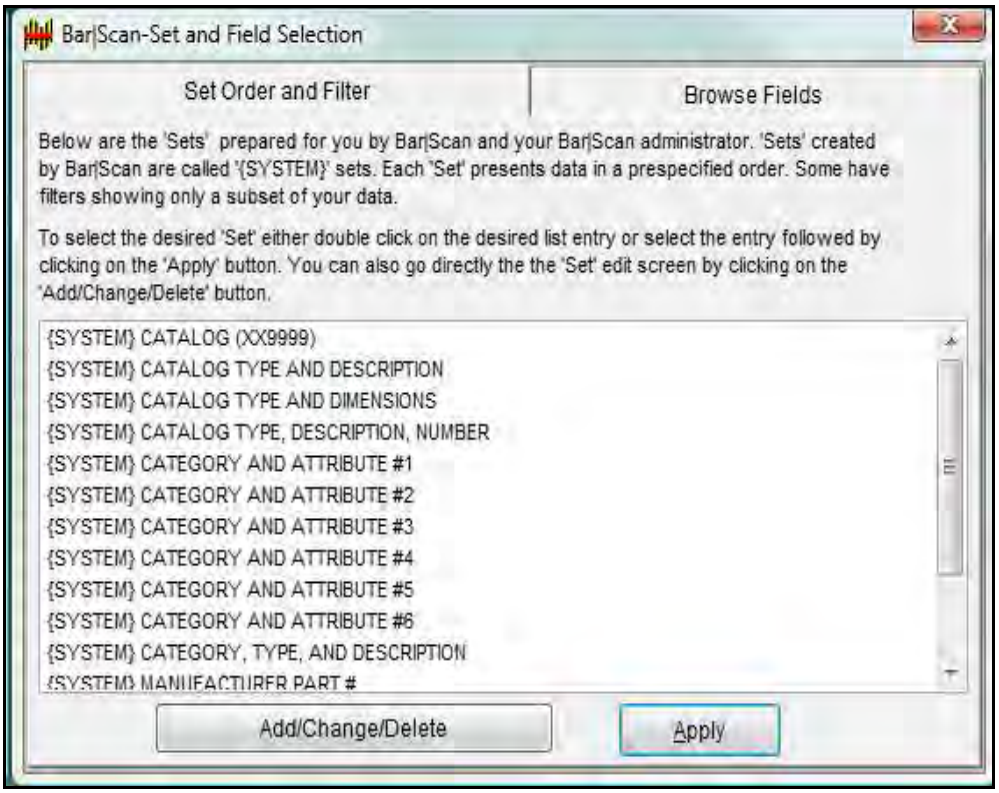
You can add a filter to your Set, but adding a filter to a Set will slow the sorting down, and may cause your table to open slower if the last Set you used before closing the table had a filter.

Choosing to sort by asset number will render any additional choices meaningless; as each asset number is unique, no further sorting will take place. If you want your items sorted by asset number, **always** place this item as the last item to sort by.

You can choose to sort all information in a table by any field that is in this table.

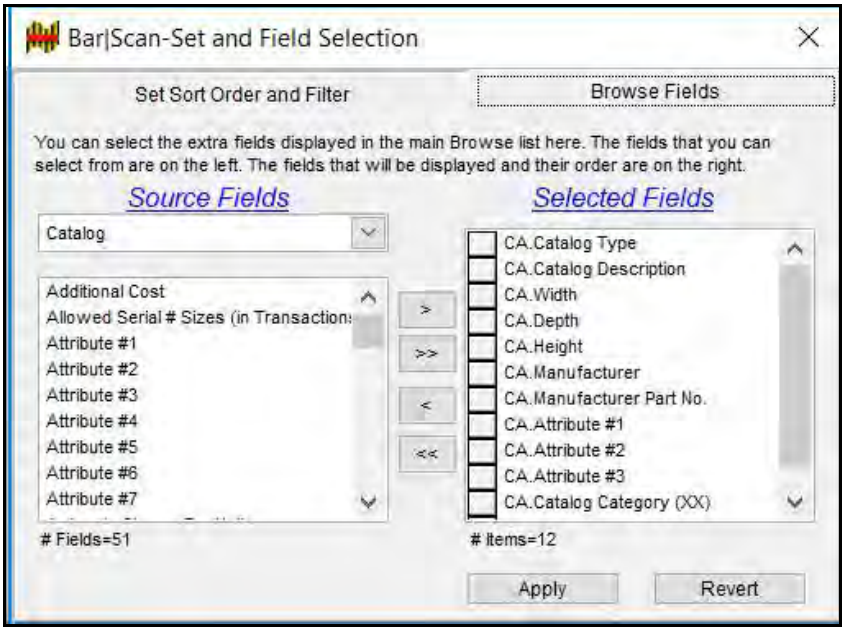
Hint: There is one drawback to entering a large number of items in the *Order By*. The more items you have, the more time it will take initially to create the associated index. Fortunately, this is a one time process for the SET feature.

When you press the Set Button, you will see a Set table similar to the one below.



The information displayed inside the Set panel will change, depending on which panel you were on when you pressed the Set button. For the example shown above, we were on the Catalog table. You may choose any of the Sets listed on the Browse tab, or select the Add/Change/Delete button, and create your own.

When you select the Browse Fields tab, you will see a tab like the one below.

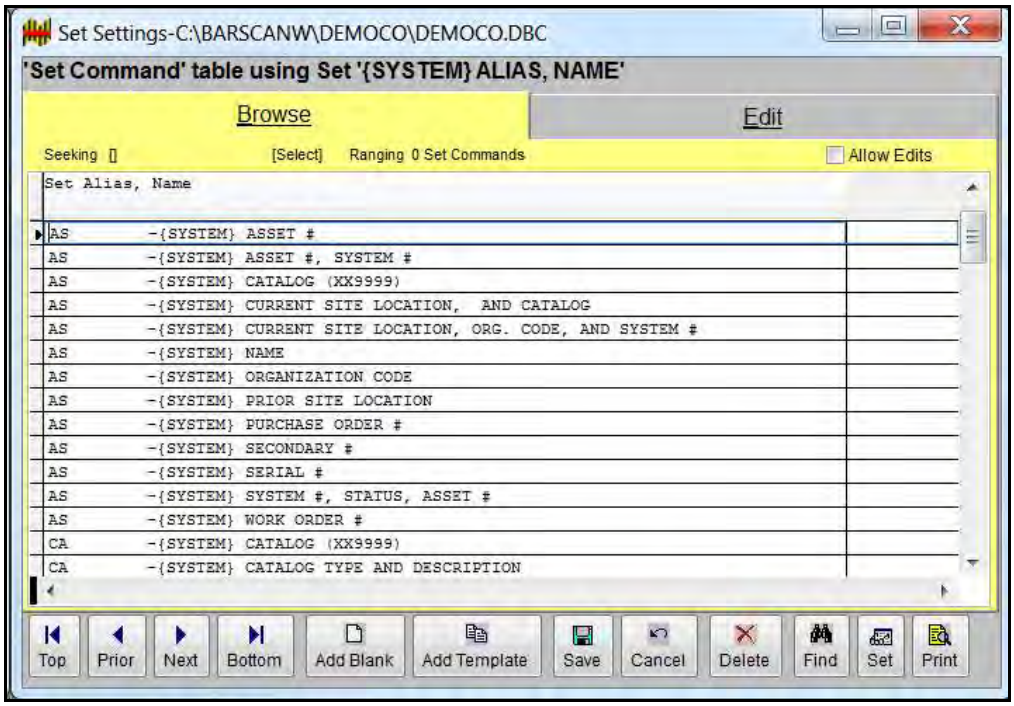


The list on the left is a list of the fields that are available for you to add to the Browse window. The list on the right is the list of items that will appear as columns on your Browse panel.

Add columns or delete them, then press the Apply button to ok a new browse list. If you think you have made a mistake, or have just changed your mind about changes you have made to a Set, you can use the Revert button. Press the OK button, and the columns that you have chosen or added will appear on your Browse panel.

Note: The same columns will appear for every set, with the exception of the first column. The first column always lists the item(s) that the set is sorted by. For instance: if you select the Asset # set, the first column will be Asset #, and all of the columns thereafter, will be the ones chosen on the above panel. A column, therefore, may appear twice on the browse tab, if you have selected to sort by a column that is listed on this panel as one of the columns. You may choose to move the columns around manually while on the Browse tab if this happens.

When the Set button is pressed, you can select the Add/Change/Delete button, and you will be shown the Set table like the one below.

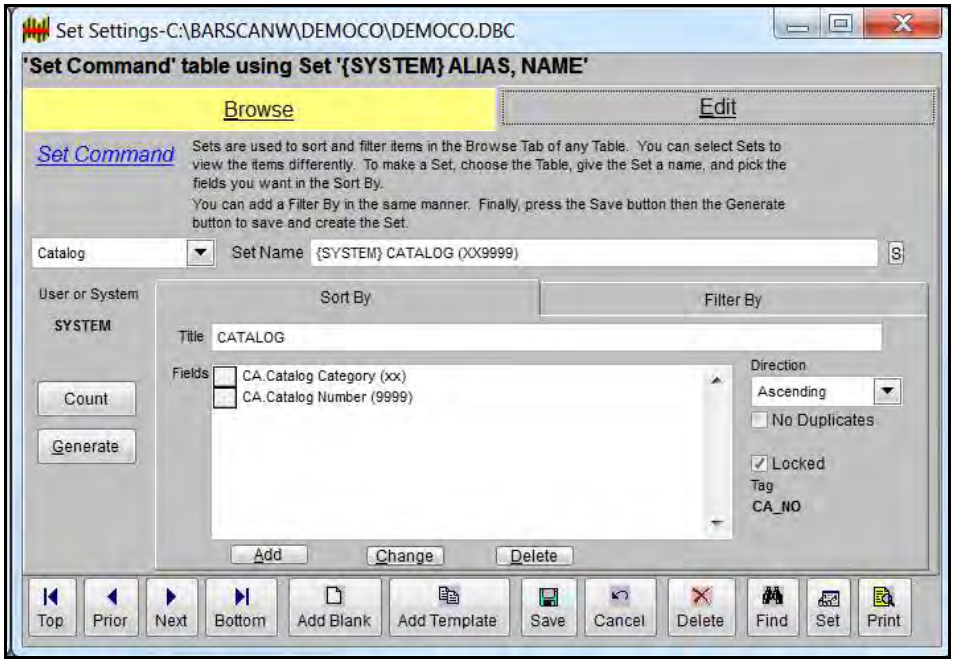


This table works like any other table in Bar|Scan; you can Add, Change, or Delete Sets.

Note: You can Change or Delete {System} Sets but only after you unlock them.

To Add a new Set, select a Set that is similar to the one that you want to add. Click on the Add Template button, then, click on the Edit tab.

You will be shown a panel similar to the one below.



Type in a new name and a new title for your Set. Next, you need to select the field(s) that you want your information to sort by. Select the Add or the Change button, and a Look up Window will appear. Select from this Look up Window your choices for Fields, then close the Look up Window. Review the Field(s) listed. If there are any Fields listed that you do not need, simply highlight them, and select the Delete button.

The information will sort by Ascending order by default, but you may change the direction of sort to Descending, if you prefer. Then, select the Save button from the Tool Bar.

Note: In order to use the new Set, you have to Generate the Set. To Generate the new Set, you have to be the only person in that Company in Bar|Scan, and you have to close all other tables (besides the Main Menu).

Once you have closed all other tables, click on the Generate button. The system will give your new set a Tag number, which you can view on the bottom right of

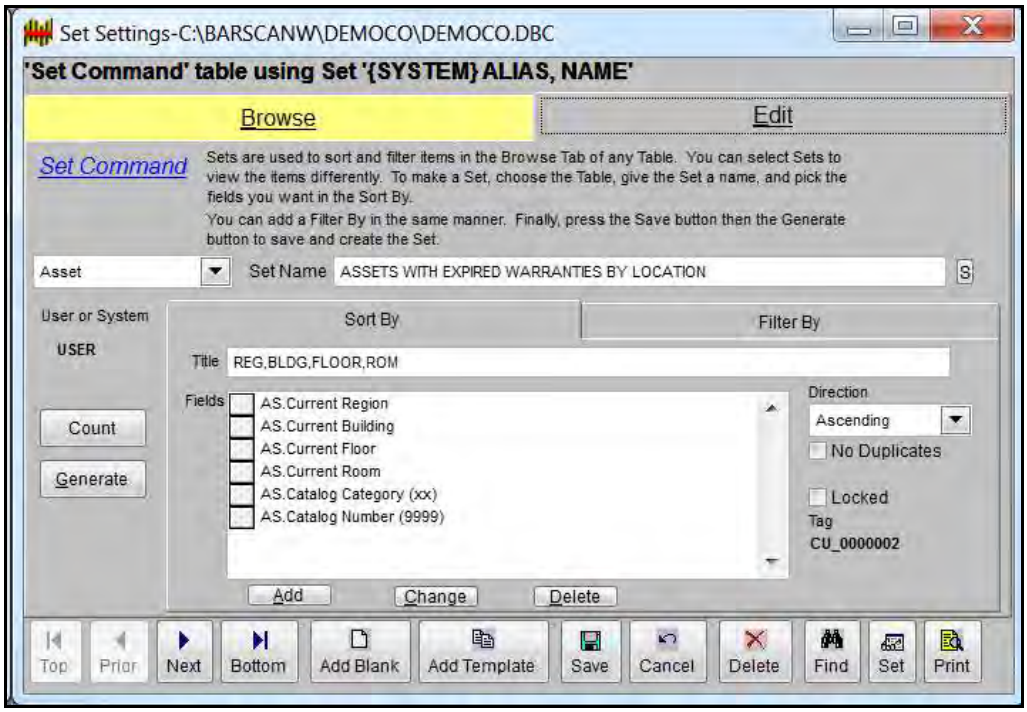
this Set Edit tab. This number is used internally, and you do not have to remember the number, but only to confirm that the Set has a number rather than to say Dynamic. Once your new Set no longer says Dynamic, the set can be used. Close this Set table.

Optimizing Set Commands with Filters

By default, Set Commands with Filters do not use indexes for the filter criteria. However, they can be optimized to use indexes. An index is a data structure that improves the speed of look-ups and data retrieval.

The process to optimize a SET takes a few steps. In summary, if you index by the Filter items, the Set Command will display the filtered items much faster in the Browse Screen. Lets see an example.

Below is an Asset Set with Assets indexed by Location. Because the Location index is created when you press the Generate Button, the Assets will display very quickly when this Set is selected.



Now lets click on the Filter By Tab and add a filter as shown below.

The field to filter the Assets by is Warranty Expiration Date, a User Defined Field (UDF) that was created for this database. Bar|Scan did not previously have this field so no indexes exist. This will mean that the data retrieval will be slow.

So, if we create an index for Warranty Expiration Date, the SET above will work very fast. The process is to create a ***New Set*** ordered by Warranty Expiration Date. An example is shown below.

There is no need to add Filters as shown below.

To Summarize - if an index does not exist for a field and you use that field in a Filter By Tab, the data will appear slowly in the Browse Tab. To correct this, create a new Set Command with the same field in the Order By tab.

ASSETS

INTRODUCTION

At the heart of the Bar|Scan system is the list of your assets, and the associated asset information.

The Asset feature of Bar|Scan provides you with the ability to enter new assets, view selected assets or groups of assets, change existing information on an asset or group of assets, and remove an asset or group of assets.

Bar|Scan can also track consumables and non-tagged assets. We call this a Quantity Mode inventory.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

Another part of the Asset feature permits you to identify a particular group of assets from which to choose when viewing, changing, adding, or deleting. This is accomplished in two ways as follows:

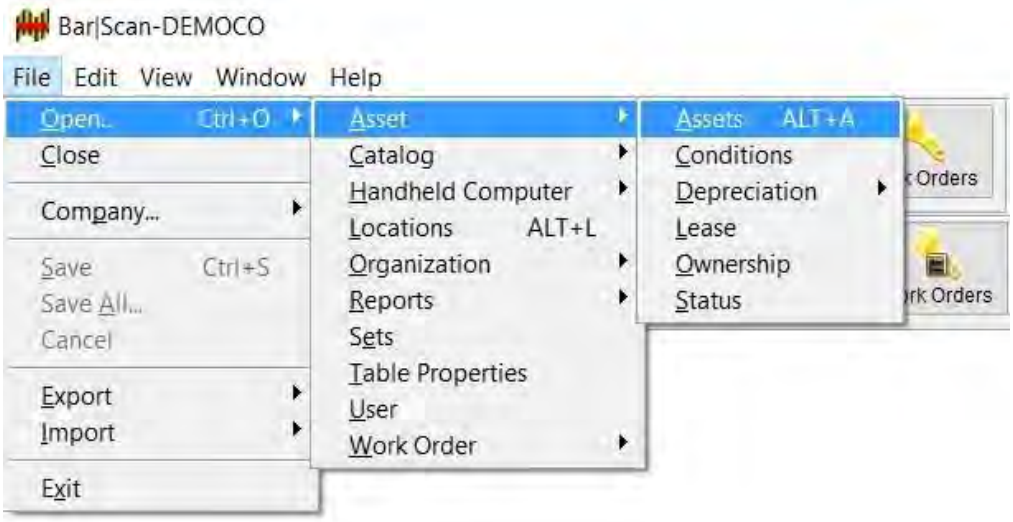
✓ You may select the order in which the assets will appear. They can be displayed in order by any field or combination of fields. Some common orders are location, serial number, asset number, or catalog. Selecting the order before you begin your work greatly enhances your editing abilities. The default order is asset number.

✓ As your list of assets becomes large (twenty thousand or more assets are common) this tool will "filter" out all but the group of assets you currently wish to work on.

An important feature of the "filter" is that it may speed up your editing because you can manipulate only the filtered assets and not every asset in the system. We recommend using the "filter" when working with large numbers of assets. The tool we have just described is called SET. It is discussed in more detail later in this Chapter.

The original entry of new assets and quantity inventory into the system is usually accomplished using the Bar|Scan Mobile app in your Mobile Device.

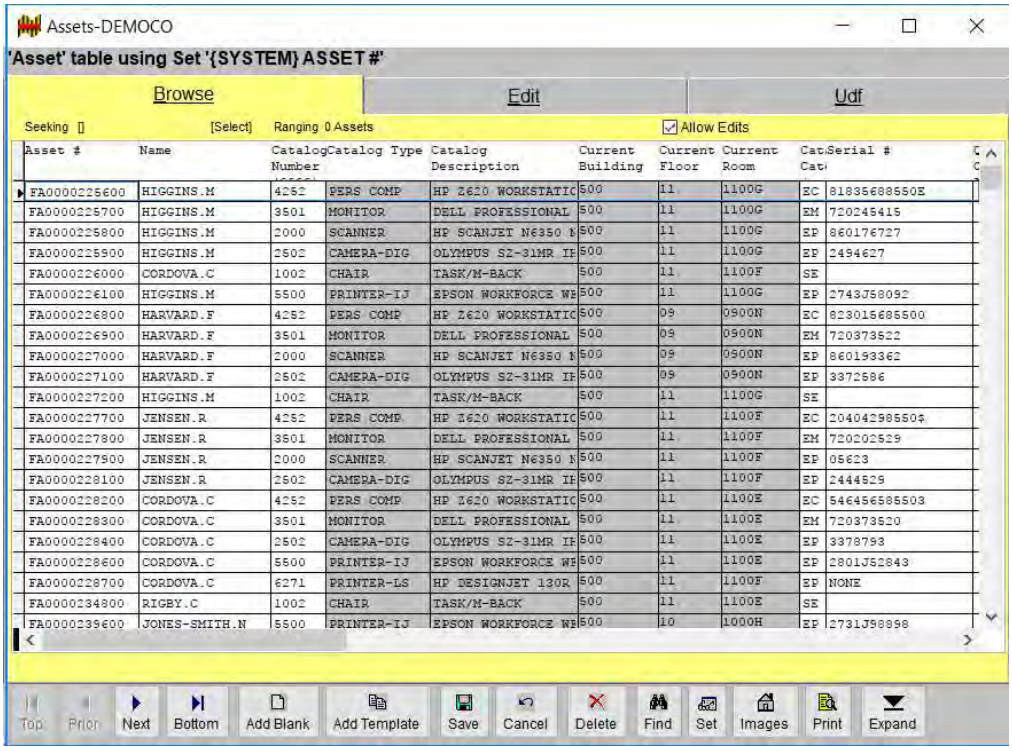
When you want to view, change, add, or delete assets you will need to open the Asset table. From the Main Menu, select File, then Open ...▸, then Asset ...▸, then Assets as shown on the following example.



Or you may click on the Asset Icon on your Table Toolbar. The icon is displayed below.

Once you have chosen Assets in either of the above manners, you will be shown the Asset table.

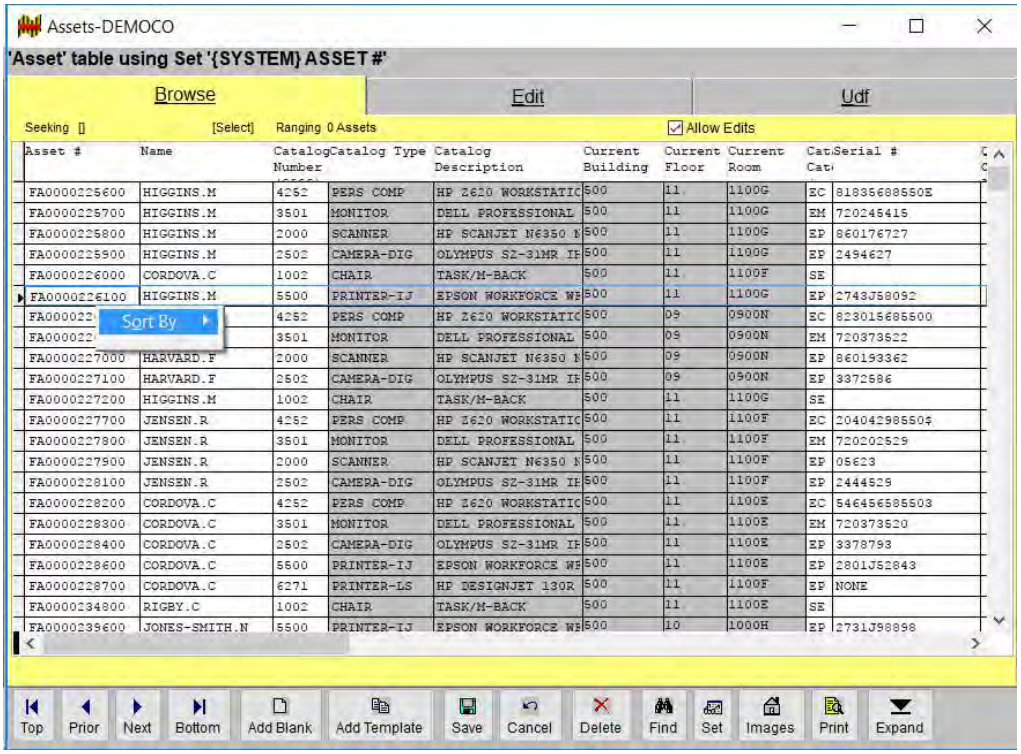
Your Asset table will look similar to the one below.



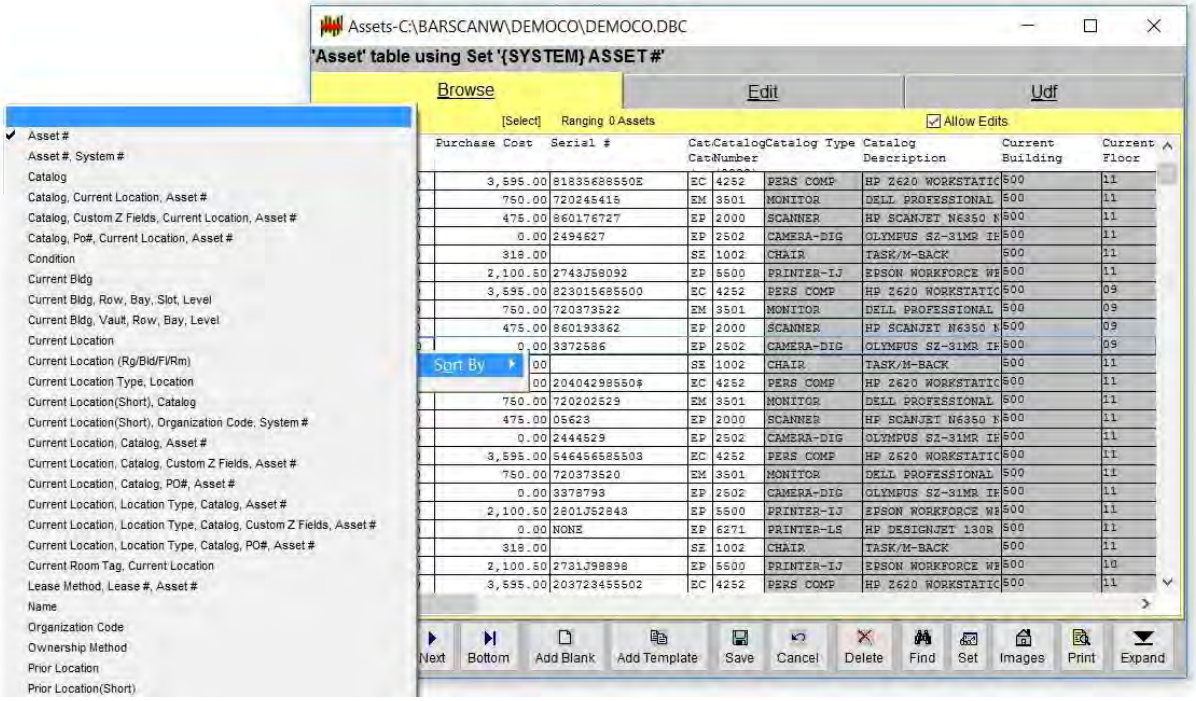
Asset #	Name	Catalog Number	Catalog Type	Catalog Description	Current Building	Current Floor	Current Room	Cat	Serial #
FA0000225600	HIGGINS.M	4252	PERS COMP	HP Z620 WORKSTATIC	500	11	1100G	EC	818356885505
FA0000225700	HIGGINS.M	3501	MONITOR	DELL PROFESSIONAL	500	11	1100G	EM	720245415
FA0000225800	HIGGINS.M	2000	SCANNER	HP SCANJET N6350 N	500	11	1100G	EP	860176727
FA0000225900	HIGGINS.M	2502	CAMERA-DIG	OLYMPUS SZ-31MR IP	500	11	1100G	EP	2494627
FA0000226000	CORDOVA.C	1002	CHAIR	TASK/M-BACK	500	11	1100F	SE	
FA0000226100	HIGGINS.M	5500	PRINTER-IJ	EPSON WORKFORCE WF	500	11	1100G	EP	2743J58092
FA0000226800	HARVARD.F	4252	PERS COMP	HP Z620 WORKSTATIC	500	09	0900N	EC	823015685500
FA0000226900	HARVARD.F	3501	MONITOR	DELL PROFESSIONAL	500	09	0900N	EM	720373522
FA0000227000	HARVARD.F	2000	SCANNER	HP SCANJET N6350 N	500	09	0900N	EP	860193362
FA0000227100	HARVARD.F	2502	CAMERA-DIG	OLYMPUS SZ-31MR IP	500	09	0900N	EP	3372586
FA0000227200	HIGGINS.M	1002	CHAIR	TASK/M-BACK	500	11	1100G	SE	
FA0000227700	JENSEN.R	4252	PERS COMP	HP Z620 WORKSTATIC	500	11	1100F	EC	204042985505
FA0000227800	JENSEN.R	3501	MONITOR	DELL PROFESSIONAL	500	11	1100F	EM	720202529
FA0000227900	JENSEN.R	2000	SCANNER	HP SCANJET N6350 N	500	11	1100F	EP	05623
FA0000228100	JENSEN.R	2502	CAMERA-DIG	OLYMPUS SZ-31MR IP	500	11	1100F	EP	2444529
FA0000228200	CORDOVA.C	4252	PERS COMP	HP Z620 WORKSTATIC	500	11	1100E	EC	546456585503
FA0000228300	CORDOVA.C	3501	MONITOR	DELL PROFESSIONAL	500	11	1100E	EM	720373520
FA0000228400	CORDOVA.C	2502	CAMERA-DIG	OLYMPUS SZ-31MR IP	500	11	1100E	EP	3378793
FA0000228600	CORDOVA.C	5500	PRINTER-IJ	EPSON WORKFORCE WF	500	11	1100E	EP	2801J52843
FA0000228700	CORDOVA.C	6271	PRINTER-LS	HP DESIGNJET 130R	500	11	1100F	EP	NONE
FA0000234800	RIGBY.C	1002	CHAIR	TASK/M-BACK	500	11	1100E	SE	
FA0000239600	JONES-SMITH.N	5500	PRINTER-IJ	EPSON WORKFORCE WF	500	10	1000H	EP	2731J98898

On the Asset table, the Browse panel is selected by default.

The asset information on the Browse panel can be sorted by any field. Go to the first column on the left, and then press your right mouse button, and then select the “Sort By” that will be displayed.



When you select the Order By, you will be shown a list of items that you can sort the Asset table by as shown below.

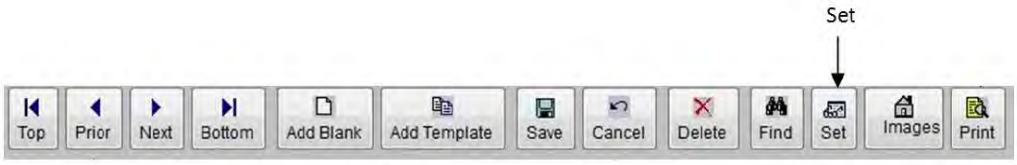


There are a few differences between this item and the “Set” icon on the toolbar: the Set icon on the toolbar contains all sets that have been made, the Set icon allows you to create new sets, and the sets created with the Set icon may contain a filter.

Once you have used a set that contains a filter from the Set icon list, right clicking and selecting a new Order By will **not clear** that filter.

For example, you may select a set for your Transaction table that lists only Bad Transactions by Asset number. Let's say you want to re-sort those bad Transactions by their Current Location. If you right click on the first column, select the Order By, and then select Location, the bad Transactions will re-sort by their Location. If you had selected the Set icon to sort the Transactions by Location, the entire list of Transactions, both Good and Bad, would appear sorted by their location.

Or select the Set button on the tool bar as shown below.



Select the field or fields that you want the Assets to sort by.

This feature will give you the ability to look at all of the assets, pre sorted the way you specify. If you do not specify another sort, the default sort is by Asset number.

CREATING A NEW ORDER AND FILTER - THE SET FEATURE

The SET feature allows you to order and optionally identify a smaller, more manageable group of assets from which to select, i.e., only those assets in a particular location or only those assets made by a particular manufacturer, etc.

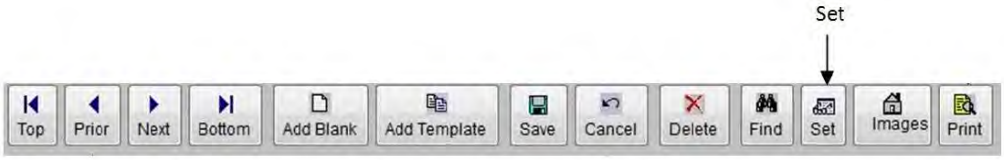
As the number of assets on your system increases it becomes more time consuming to look through the entire list of assets displayed on a look up window.

SET permits you to "order" your assets by any item in your table. By sorting the assets by different fields, you can shorten your search time dramatically.

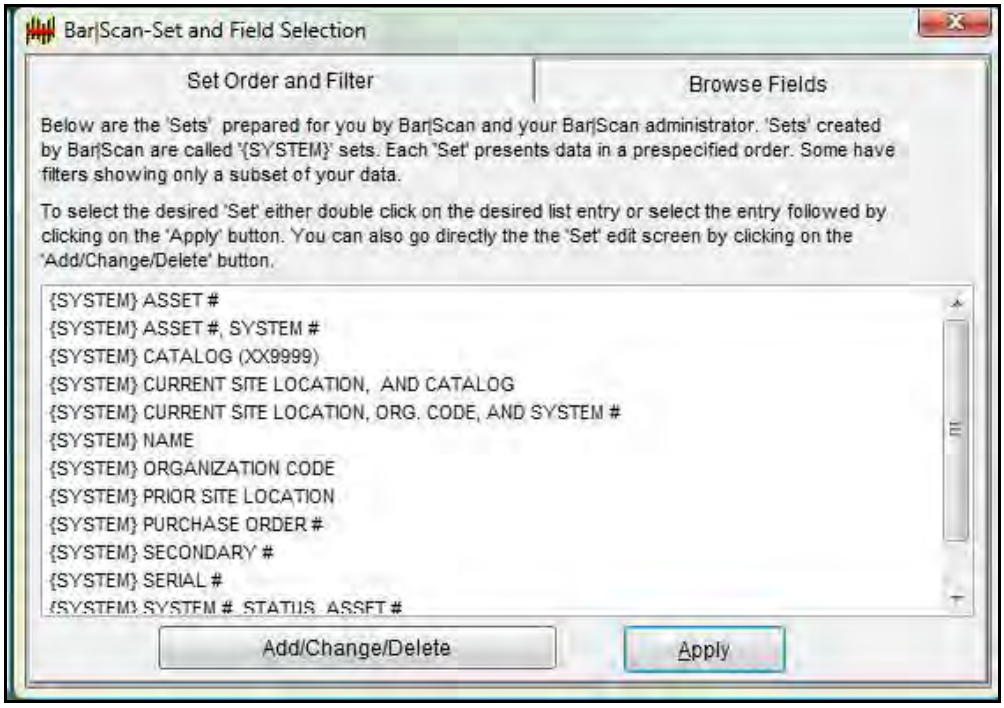
SET also allows you to change the columns seen in the browse window.

Because SET offers almost endless possibilities for identifying groups of assets, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any asset. It merely specifies the sequence of asset selection lists.

When you want to view your assets in an order other than by asset number, select SET, by clicking on the icon shown below.



This button activates the Set feature, and a screen similar to the following will appear.

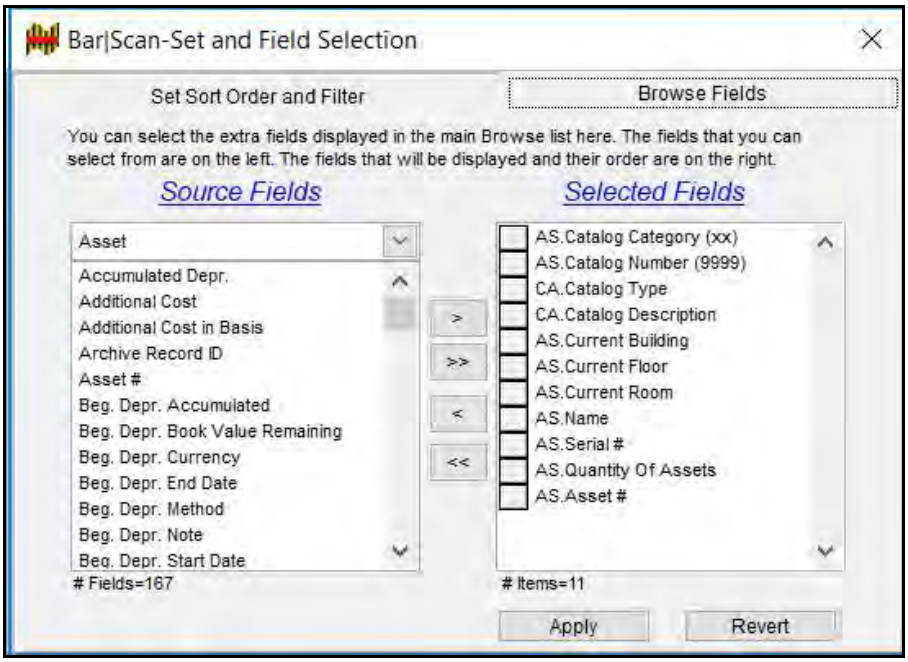


This Set Order and Filter tab, shows a list of Sets that are pre defined in the Bar|Scan system. You may select any of these to sort your table by the field(s) listed.

You can, however, define additional Sets. Click on the Add/Change/Delete button shown above, and the Sets table will open. Once on the Set table, you may add, change, or delete your own sets.

If you would like to see the browse fields, which are available for the predefined Sets, add or remove a field, select the Browse Fields tab.

When you select the Browse Fields tab, you will be shown the following screen.



The first field on the Browse Fields tab, says Asset and there is a ▼ to the right of it. This signifies that the fields listed below are stored in the Asset table in Bar|Scan. If you need to access any of the other tables in your Bar|Scan system, simply click on the down arrow, and a drop down list will appear, revealing all of the other tables. When you choose a different table, the fields listed below it will change to reflect the available fields for the new table.

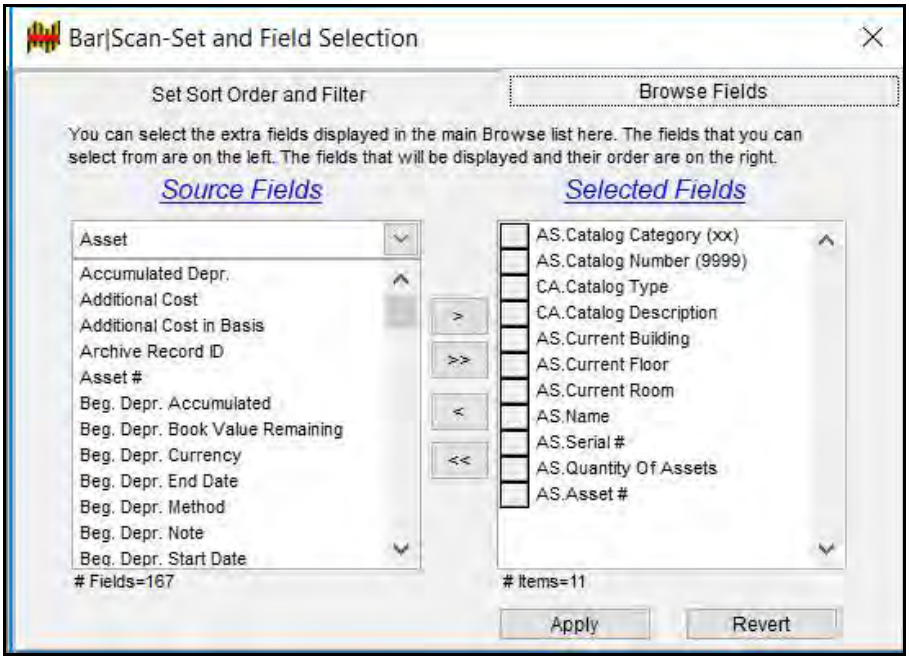
On the left side of this screen there is a list of all of the available fields for the Asset table that you may display in your Sets. On the right side of this Browse Fields tab, you will see the current fields that will be displayed for each Set.

These fields are displayed for all of the different Sets, beginning in the second column. The first column will display what the table is being sorted by.

Changing the Order of the Columns Shown in a Set

You can change the order the columns will appear using two different methods.

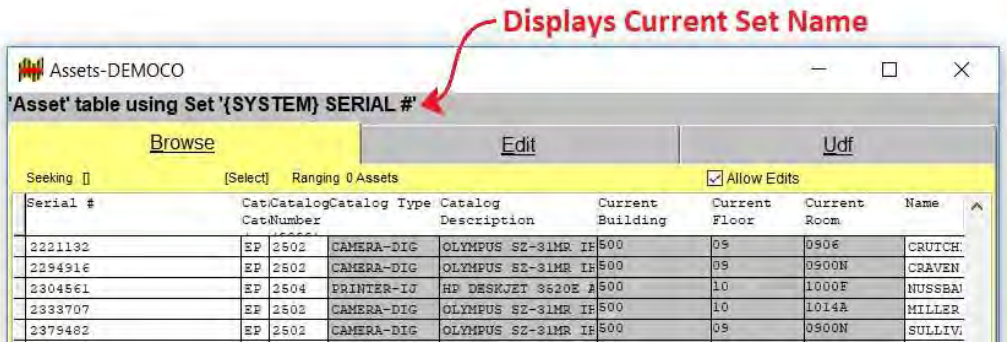
The first method uses the Set and Field Selection table. Click on the small grey box next to the field name, and the cursor will change to a double headed arrow as shown below.



Hold your mouse button down, and drag the field up or down. When you click on the Apply button, this window should close automatically, and the columns should reflect the changes you have made.

When completed, press Apply to save your changes.

In order to better demonstrate this concept, select one of the pre defined Sets by using the Set icon on the toolbar, and click on apply. You will see the items in your table sorted by the new criterion. The columns that will appear will be the same as selected on your Set Order and Filter tab with the exception of the first column that is being used to display what the assets are being sorted by.

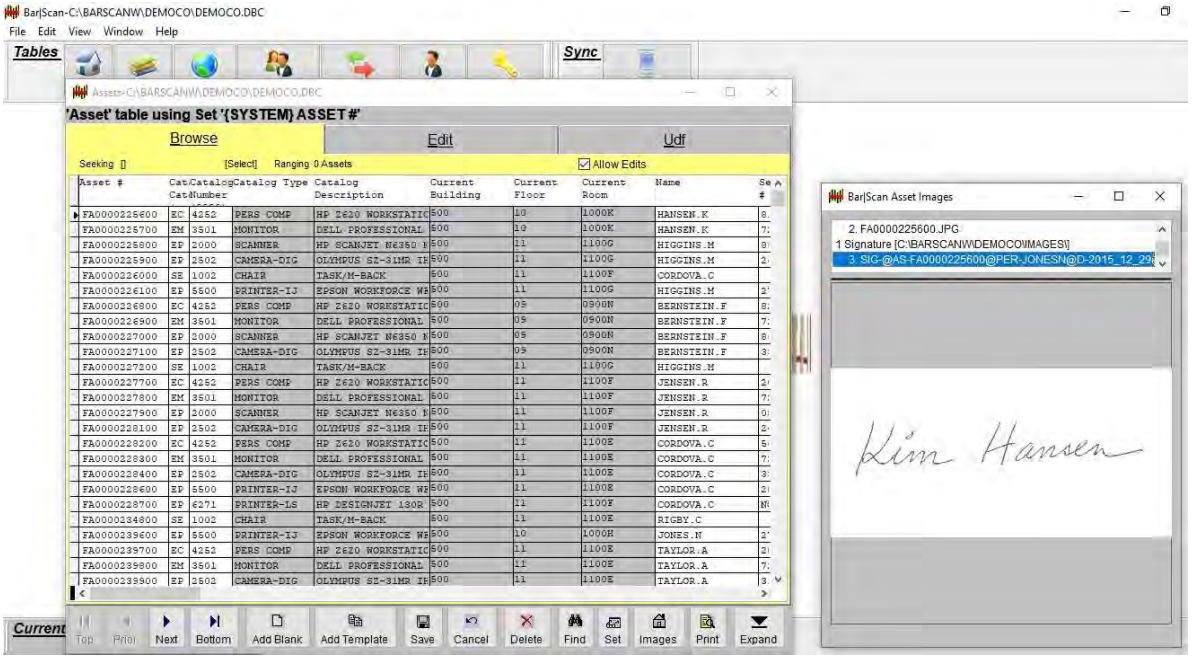


For the information displayed above, we chose the Serial number Set. Notice that the rest of the columns are still the same as they were when sorted by Asset number, i.e., Catalog Category, Catalog Type, Catalog Description, Serial number, etc. The only column that changed was the sort by column, the first column displayed. A sort can contain more than one item. But, no matter what the sort of the list, the rest of the columns stay the same.

The second method of changing the order of the columns is to left click the top of the column in the grey area that holds the name of the field, hold your mouse button down, and drag the column to the left or right. The columns will move to fill in the gaps as you move your mouse. This is a useful tool and much faster than respecifying the columns for a Set.

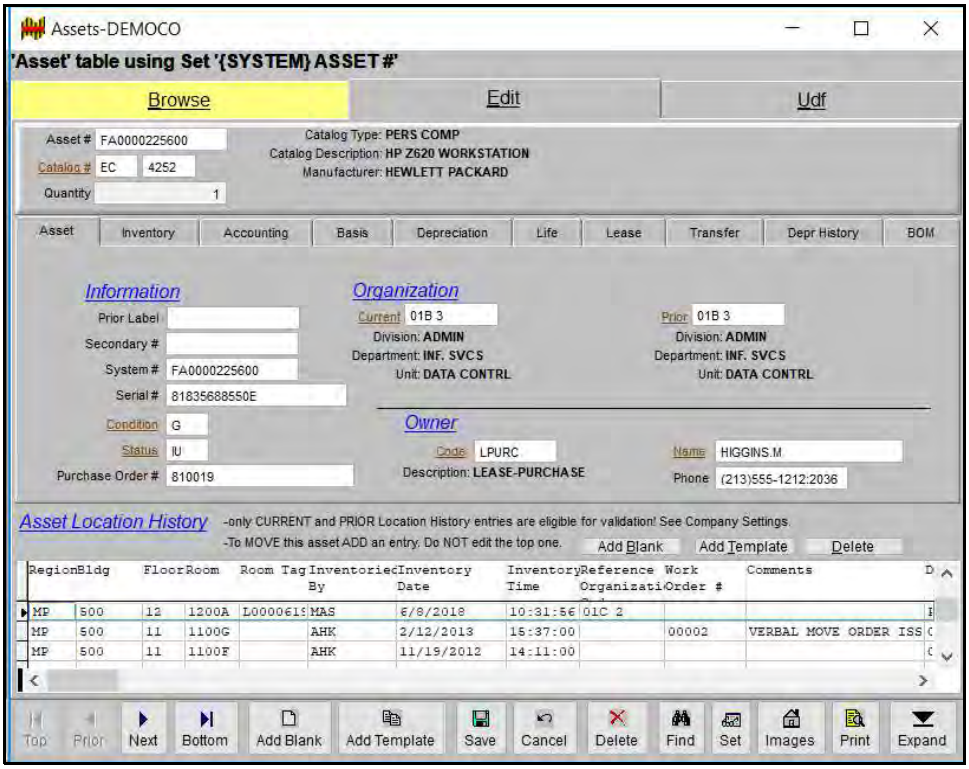
WORKING WITH IMAGES ON THE ASSET SCREEN

To view images on screens, all image viewing are consolidated under a single button, 'Images'. Also of note, the list of images is categorized by folder and type of image. Also, the listbox at the top will contain the folder and image filename. Signatures that are not yet permanent are listed as 'Pending' signatures. Finally, the listbox is expandable. You can grab the black bar immediately below the listbox to make the list box larger or smaller. The image is appropriately resized.



THE EDIT TAB

When you want to see the detailed information that has been entered into the Asset table, you will need to select the Edit tab. When you do, you will be shown a screen similar to the one below.



Every item on this screen can be collected by using the Mobile Device as well as entered at the keyboard.

Note that this tab has ten tabs on it as pictured below.

Each of these tabs contains fields for information about the asset. If, however, your company has not purchased the optional Accounting module, you will not be able to access all of the tabs shown above.

The first tab, the Asset tab, is open as a default.

At the onset of your inventory, you will configure the Mobile Device to prompt you for information about the assets. All of the information that appears on the above tab can be collected with the Mobile Device during the inventory.

The second tab on the Edit tab screen, Inventory, is shown below.

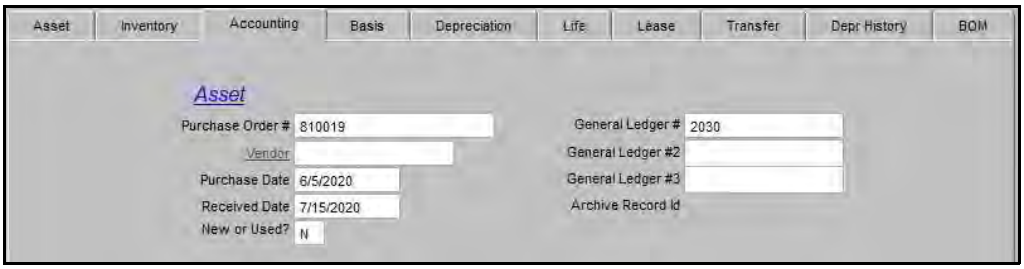
✓ **Scan Information -** The Scan information on this screen also comes from the Mobile Device. The user initials are entered into the Mobile Device , and then the inventory date and the inventory time are updated as each asset is entered into the Mobile Device .

The inventory Comments are displayed below the inventory time. This field correlates directly with the field in the Mobile Device . It is used for additional information pertaining to the asset that can be gathered at the time of inventory, such as the details of its condition, i.e., scratched.

✓ **Disposal/Sale -** The Disposal/Sale fields are displayed next. These include the Disposal Date, the Type, Sales Value, Disposal Gain or Loss and a field for the Buyer name. Typically, your assets will remain in your system after their actual disposal. By using a "filter," they can be included or excluded from your asset reports. The information displayed in the Disposal/Sale fields is entered into Bar|Scan via the keyboard. Be aware that the Disposal date does affect depreciation. This is discussed further in the section *A Word About Depreciation* in this chapter.

✓ **Remarks -** The last section of this tab holds three remark fields. These three fields are available for any additional information that you would like to attach to your assets, after the initial inventory via the keyboard.

The third tab on the Edit tab screen, Accounting, is shown below.



This tab is available to anyone who has purchased the Accounting module. Most of the items on this screen are entered at the keyboard. However, the Purchase Order # can be collected in the Mobile Device.

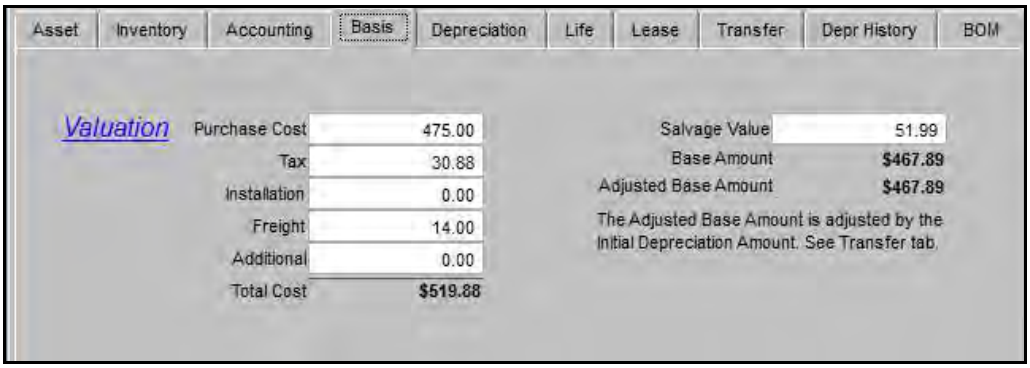
✓ **Asset** - The Asset information on this tab shows dates and basic information on the initial purchase of the asset, and on the right there are three fields for General Ledger numbers.

The Archive Record Id is a Data Transfer Record Id. If you do an Import or an Export using a Data Transfer file or an inter-company transfer, all of the records that are transferred (during that one transfer) are given the same Archive Record ID. You can not edit or enter a number in this field. But, if the item has been imported, a number is displayed for you.

You can print the Archive Record Id as a column in an Asset report. All of the Assets that were imported together will have the same Archive Record Id.

For instance, let us say that you have three companies. You need to transfer some assets from Company A to Company B. For some reason, you accidentally selected Company C, and performed the transfer. You could create a report with the Archive Record Id and the Log Date and Log Time as columns. With this information, you could tell exactly which assets were imported together, and then export them to the correct company.

The fourth tab on the Edit tab screen, Basis, is shown below.



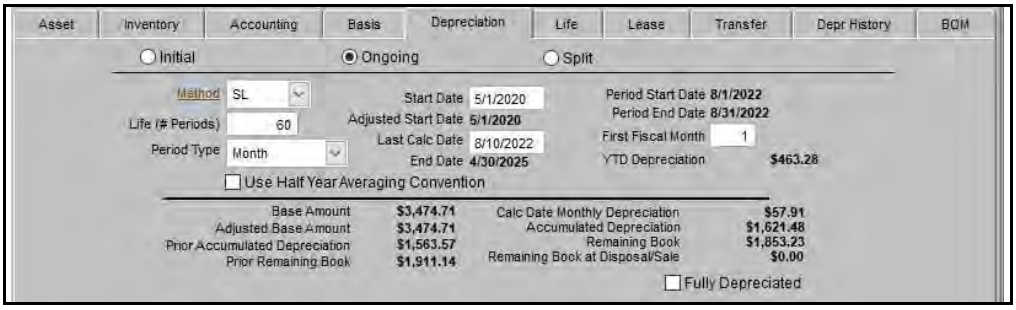
This tab is available to anyone who has purchased the Accounting module. The items on this screen are entered at the keyboard.

✓ **Valuation** - shows information on all asset purchase costs and salvage value.

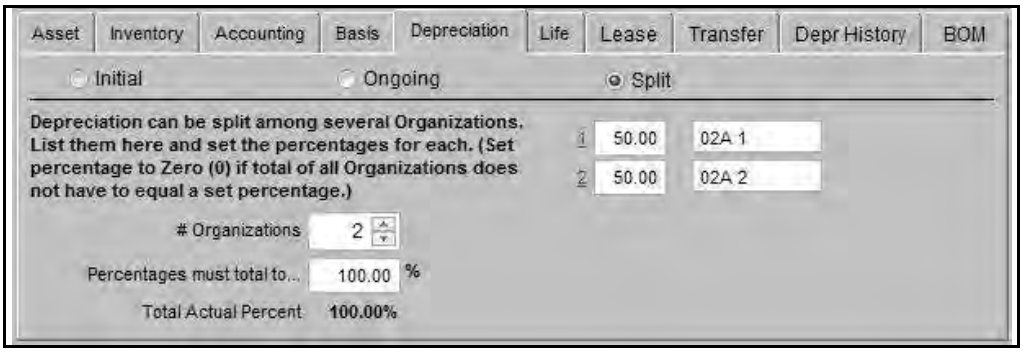
The fifth tab on the Edit tab screen, Depreciation has 3 sub tabs. The first is shown below.

This tab is available to anyone who has purchased the Accounting module. All of the items on this screen are entered at the keyboard.

✓ **Initial Depreciation** - shows the date when depreciation was transferred, and the accumulated depreciation at the date of transfer. This is generally used when beginning depreciation in Bar|Scan for assets that already had a depreciation balance in another system. For example, this could contain the depreciation taken in another system just prior to the import of the asset into Bar|Scan.



✓ **Ongoing Depreciation** - Basically a method of cost allocation, depreciation can be a complex issue and is used for many different purposes.



✓ **Depreciation Split** - Basically a method of cost allocation between departments, depreciation splits can also be a complex issue and is used for many different purposes.

Bar|Scan can provide you with *simple* methods of handling depreciation expense. This is often adequate for issues such as charge-back to your departments, or budget analysis.

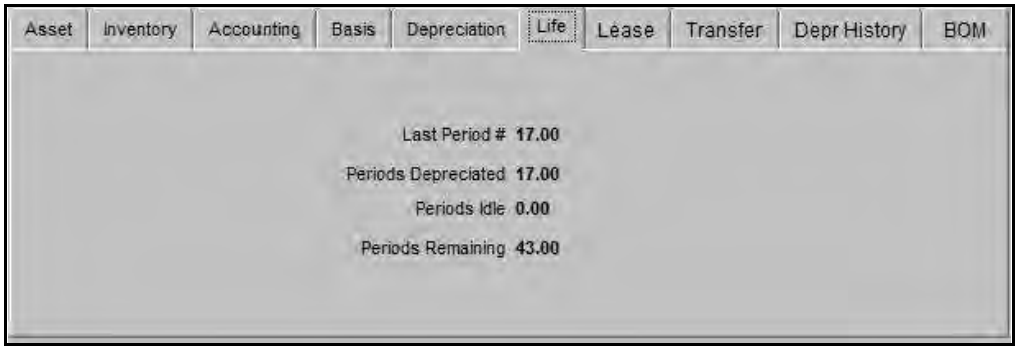
If you are working with a collection of assets that are similar in nature, you are using a group system of depreciation. If you are working with a collection of assets that are dissimilar in nature, you are using what is typically referred to as a composite system of depreciation.

The Split button is optional and most be selected in the Company Settings Screen, Depreciation/Currency Tab in order to be active.

Important: Bar|Scan is not capable of providing you with all of the features required for tax reporting purposes.

As you can see, many items on this screen are calculated and not entered by the user.

The sixth tab on the Edit tab screen, Life, is shown below.

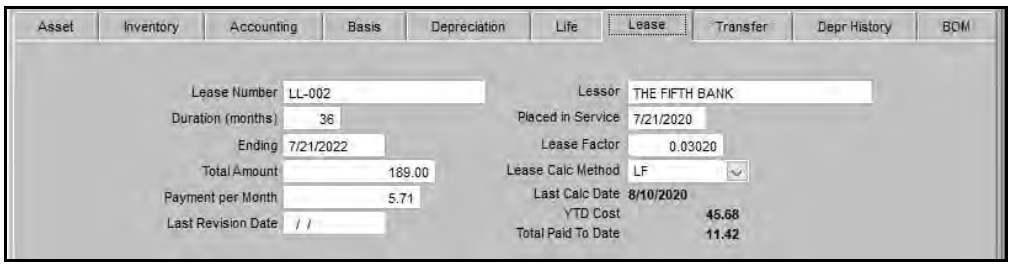


This tab is available to anyone who has purchased the Accounting module. The items on this screen are calculated by Bar|Scan.

✓ **Life** - The depreciable life of an asset is theoretically based on its estimated service life. Practically speaking, the actual depreciation life is dictated by financial or reporting requirements.

Bar|Scan shows the relevant number of months that depreciation was taken or if the asset was idle at any time (not applicable for all depreciation methods).

The seventh tab on the Edit tab screen, Lease, is shown below.

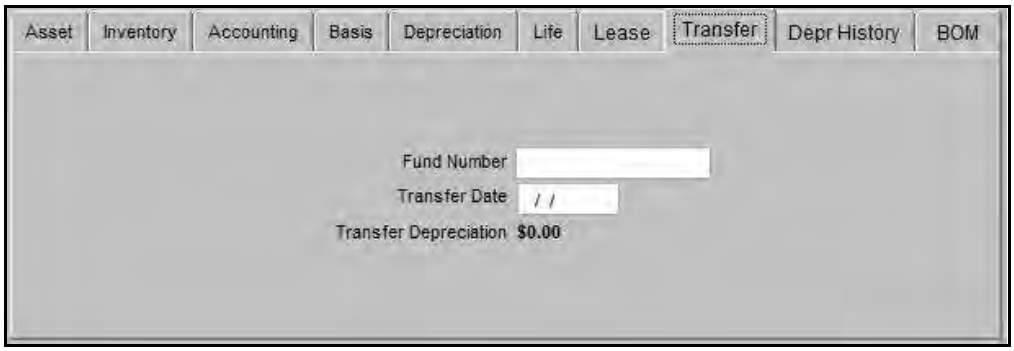


✓ **Lease -** This tab can be used to track commonly recorded information. If your company is leasing assets, you may wish to add this information to Bar|Scan. Leased assets are normally not depreciated, so there is no depreciation information entered.

In any case it is best to consult your accounting department for proper allocation of this information.

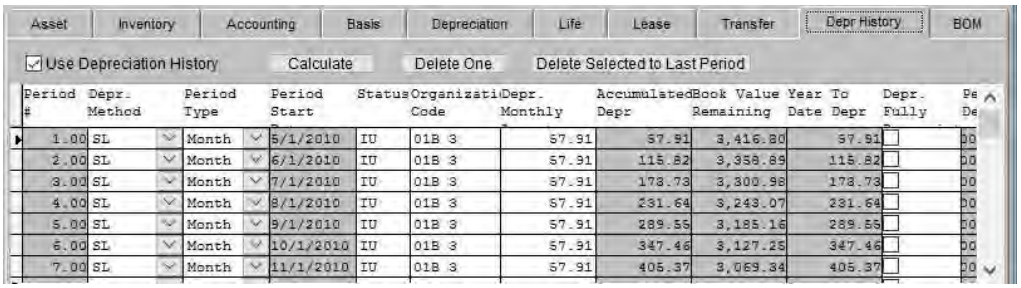
The information on this table can be filled in per asset. But, if you have a lease number that involves many assets, and you do not wish to enter the information for every asset that is concerned, you can enter the information into a separated lease table. This lease table is located by going to the Main Menu, select File, then Open ...▸, then Asset ...▸, then Lease. You fill the information for a lease on that table one time, and then each time you find an asset that uses that lease, you manually fill the lease number in the tab shown above, and the rest of the information will be filled in for you.

The eighth tab on the Edit tab screen, Transfer, is shown below.



✓ **Organization Transfer -** This tab shows the amount of depreciation taken at the time the asset is transferred from one Organization to another. It is refreshed every time you change the current Organization Code. Bar|Scan does not maintain a history of transfer information.

The ninth tab on the Edit tab screen, Depreciation History, is shown below.



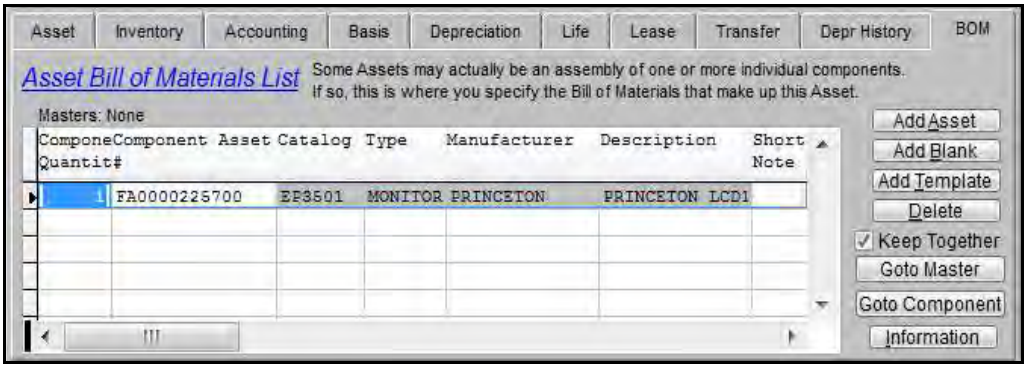
Period #	Depr. Method	Period Type	Period Start	Status	Organizati Code	Depr. Monthly	Accumulated Depr	Book Value Remaining	Year To Date Depr	Depr. Fully	Pe De
1.00	SL	Month	6/1/2010	IU	01B 3	57.91	57.91	3,416.80	57.91		00
2.00	SL	Month	6/1/2010	IU	01B 3	57.91	115.82	3,358.89	115.82		00
3.00	SL	Month	7/1/2010	IU	01B 3	57.91	173.73	3,300.98	173.73		00
4.00	SL	Month	8/1/2010	IU	01B 3	57.91	231.64	3,243.07	231.64		00
5.00	SL	Month	9/1/2010	IU	01B 3	57.91	289.55	3,185.16	289.55		00
6.00	SL	Month	10/1/2010	IU	01B 3	57.91	347.46	3,127.25	347.46		00
7.00	SL	Month	11/1/2010	IU	01B 3	57.91	405.37	3,069.34	405.37		00

✓ **Depreciation History -** This tab shows the detailed Depreciation History for any asset. It is optional and can be started by checking the "Use Depreciation History" button. Many fields are maintained for each period including

The Period Number (in months)
The Depreciation Method used for the Period
The Period Type (usually monthly)
The Period Start Date
The Status (of the Asset during the period)
The Organization Code (organizational ownership at the time)
The Monthly Depreciation Amount
The Accumulated Depreciation
The Book Value Remaining
The Year to Date Depreciation
The Fully Depreciated Flag
The Periods Depreciated (taken)
The Periods Idle (not taken)
The Periods Remaining (periods left to depreciate)
The Period End Date
The Prior Organization
The General Ledger Number
The General Ledger Number #2
The General Ledger Number #3
The Depreciation End Date
The Fund Number
The Transfer Date
The Transfer Depreciation

The Prior Accumulated Depreciation
The Prior Remaining Book Value
The Prior Periods Depreciated (number of)
The Prior Periods Idle (number of)
The Prior Periods (total)

The tenth tab on the Edit tab screen, Bill of Material, is shown below.



A set of features are available to allow you to create, modify and move groups of assets by selecting them using both a Catalog Component List or an Asset Bill of Materials (BOM) List.

With these features, you can move these groups as a whole, perform work on these groups by means of a Work Order, reserve the components of these groups by means of a Reserved Bill Of Material so that they will not be available for use to build other groups or be moved to other locations.

You can also create Bar|Scan reports detailing these special catalogs, assets, and components and their relationship.

Catalog Components, Asset Bill of Materials, Reserved Bill Of Materials and Reporting are all discussed in more detail in this Chapter as well as the Catalog and Work Order Chapters.

SELECTING THE DESIRED TAB

Once you are on the first Asset tab, you can move from tab to tab of the Asset table at any time by pressing F3 or use the mouse to click on the desired tab. The information entered on one screen will not be lost when you flip to the other screen.

For instructions about cursor movement keys, function keys, using the mouse, and how to operate the look up windows, see *Chapter 5 - Operating the System.*

SELECTING THE ASSET

On the Browse tab move the highlight bar with the cursor movement keys or start typing the desired Asset Number. When the highlight bar is on the asset you wish to display, press the Edit tab in order to view the details about this asset.

From the Browse panel, you can use the Panel pull down Range or the F4 key to select a *Range* of assets to work with. For specific instruction on using the *Range* feature, see *Chapter 5 - Operating the System.*

When an asset has been selected, the detailed asset information can be viewed on the Edit tab screen.

When an asset is displayed, you may move the cursor from item to item and right click on any field, or use the F5 key, and select Look up Value to view the look up window associated with each item.

If you are not editing a RANGE of assets, you may press PgDn to view the next asset from the selection list. PgUp will display the previous asset. Ctrl + Home key combination will display the first asset on the selection list and Ctrl +End will display the last asset.

Press the X at the top right of the window or press the ESC key to return to the Main Menu. Note that if you have pending additions or changes that you will be asked to save or cancel them before you are allowed to close the panel.

CHANGING ASSET INFORMATION

From time to time you will want to change, correct, or add information associated with assets currently existing in the Bar|Scan system.

In addition to changing information associated with an individual asset, the Range feature permits you to identify a group of assets, and make the same change to the entire group at one time.

Bar|Scan will only permit you to make a change to the Asset Number if the new number does NOT currently exist in the Bar|Scan system. This is because Bar|Scan will not allow assets duplicate asset numbers to be saved.

Move the highlight bar to the desired asset and select the Edit tab. The information for the selected asset will appear.

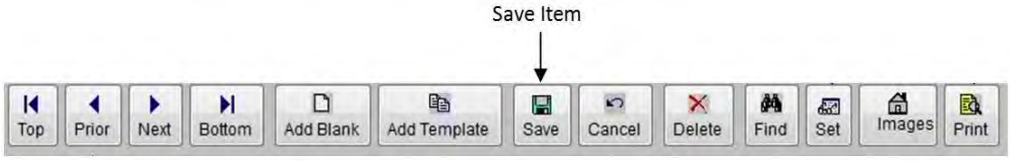
If you intend to make a group change by using the Range feature, first use the SET feature to identify the particular group of assets you wish to change.

Use the Range feature to select the group. Select the Panel pull down Range, or press F4 and the asset that you are currently on will change color; the default Range color is green, to show that it has been selected. You can then use your up and down arrow keys, the PgUp and PgDn keys, Ctrl +Home or Ctrl + End combination keys, or your mouse to select additional assets for your range. Once the items that you have selected are all highlighted, press Enter, and then select the Edit tab in order to make your change(s).

Tip 1: Double clicking an item in your browse window will also cause it to be ranged.

Tip 2: When you are in the process of ranging several items that are not consecutive, you press F4 and Enter. Go to the next desired item, press F4 and Enter. If you press the F4 and accidentally range the wrong item, you can press the F4 button again, and that last accidentally ranged item will no longer be ranged.

Note: This is a powerful feature, as you can now actually select more than one Range at a time. While this can be a real time saver, care must be taken that all of your Ranges are intentional.



After you have made your changes, press the Save icon as shown above, or press the Ctrl + S key combination to save the changed information.

If you have selected a group of assets by using the Range feature, Bar|Scan will ask you if you want to save the changes to the one asset, and then ask if you want to also send this change to the entire group of assets.

DELETING AN ASSET

This feature completely removes assets from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

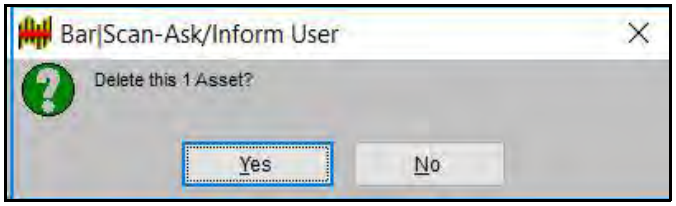
Removing assets from the system is most often done due to erroneous entries. We generally recommend that, when assets are disposed of, the assets remain in the Bar|Scan system for an extended period of time, identified by some method you devise to indicate a "disposed of" asset.

Hint: Some may prefer to create a “disposal” location. This allows assets to be scanned into “disposal” with the Mobile Device.

Bar|Scan permits you to identify a group of assets which can be removed from the system all at once. Use the SET feature to first identify a particular group of assets that you wish to remove.

To delete an asset, you must first Range the asset(s) by using the Range feature, Press F4 and then press Enter, then select the Delete button on the toolbar.

You will see a dialog box similar to the one below.



Naturally, if you have ranged more than one asset, the above dialog box will ask you if you want to delete the correct number of assets according to that range. If you choose Yes on the box above, you will be shown a dialog box asking you to confirm your choice for deletion. Choose Yes on this box to execute the deletion. You will be shown a dialog box that will tell you that the Deletion is complete.

Note: Confirmation displays (i.e., Really delete the selected asset?) can be turned off. This feature is available under Edit, Personal Program Preferences, Prompts.

ENTERING NEW ASSETS

Use the Add Blank or the Add Template button to manually enter new assets into the Bar|Scan system. It is expected however, the vast majority of your company's assets will be entered into the Bar|Scan system using the Mobile Device.

If you choose Add Blank, a blank line will appear, simply choose the Edit tab, and you may add information or make changes to this blank record. Many of the entry items have associated look up windows to assist you with your data entry.

You may use the TAB key, the arrow keys, the mouse, and the ENTER key to move to the different items on the screen. The PgUp and PgDn keys will display information from the previous or next asset respectively. To quickly access a new tab within the Edit tab, use the F3 key.

For your convenience when adding a new asset, you may use a template. When Add Template is the method of choice, select an asset similar to the one you are about to add. After selecting a similar asset, select the Edit tab and the asset information will be displayed and you can change the appropriate information to reflect the new asset. Many of the entry items have associated look up windows to assist you with your entry.

Press the X at the top right of this screen or the ESC key to return to the Main Menu. Note: if you have pending additions or changes you will be prompted to save or cancel them before you are allowed to close the Asset table.

SCANNING NEW ASSETS

In addition to entering the information manually using the asset entry screen, you can use the Mobile Device and scan bar coded labels.

It is important to note that the two methods complement each other, i.e., some of the information could be entered using each of the methods to complete the information for a particular asset.

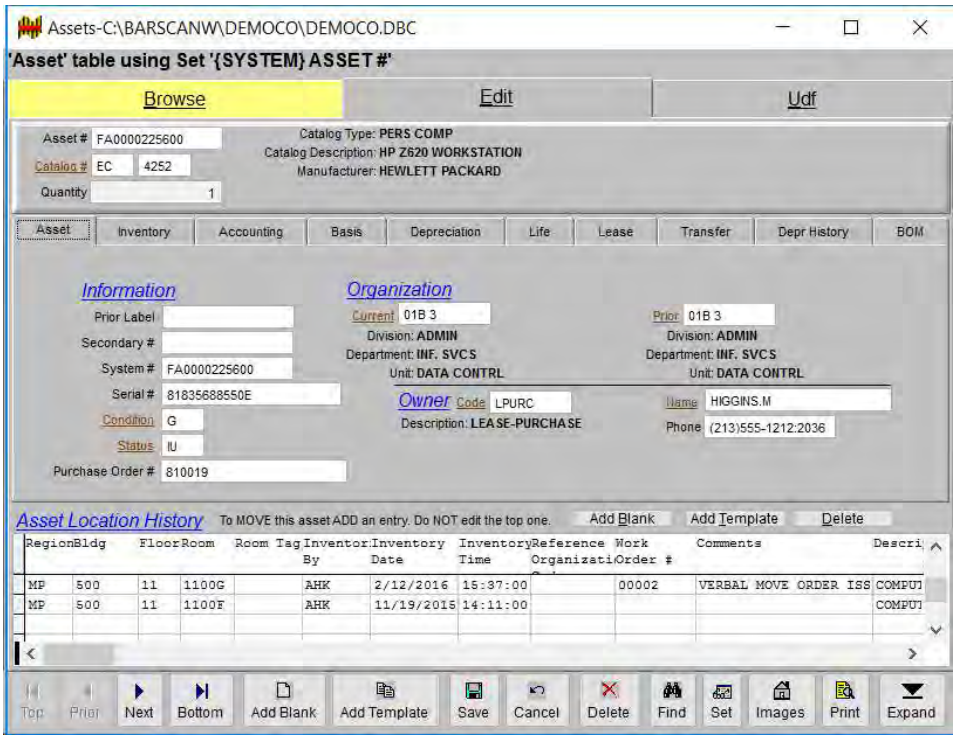
The Mobile Device is most often used to take inventory and to enter several assets (e.g., when you originally enter your assets). However, it should also be used to record new assets when they are received.

The Asset Table Information

The first tab on the Asset Table displays facilities related items. There are fields for: departmental ownership, the name of the person using the item and their telephone number, status, and condition for each asset. In addition to the unique asset number used in the Bar|Scan system, you are provided space to enter a different ID number (Secondary #) and Serial Number for each asset.

THE FIRST TAB - ASSET

All of the information on the Asset tab can be entered manually or can be collected by the Mobile Device.



Any of the items that appear in red and have a red underline are items that have a hyperlink feature. If you left click on these items, you will be able to view the information for that item in a look up window.

To move quickly to the next tab, the Inventory tab, press the F3 key.

Asset Number

A unique Asset Number is required for each asset entered into the Bar|Scan system. The number is established using a bar code label which is affixed to the asset. Each label contains a unique number and the bar code representing that number.

There is one exception; it occurs when you are using the Quantity field. This is discussed later.

The Asset Number can be up to 80 characters in length. The number need not be a fixed length, since Bar|Scan can justify and pad numbers automatically. Therefore, for equipment only inventories, you can use serial numbers as asset numbers. If you do decide to follow this course, be aware of the disadvantages, e.g. physical access.

The number may be entered into the system using the Mobile Device, or manually.

Since all asset numbers must be unique, when you are manually adding assets, care needs to be taken that your new asset number is both unique yet similar to those already in the system. You may right click on the asset number or press the F5 key and select look up value. This will display all of the asset numbers already being used. You may type the entire number, or you can move the highlight bar to a similar number and press the right arrow key to enter numbers from the look up window. When this is done, press ENTER and change the digits to correspond with a new Asset Number.

Bar|Scan is designed to monitor the new asset number as you enter it to make sure you do not duplicate an existing number. Most new asset numbers are assigned sequentially, i.e., the next asset number assigned will differ only in the last one or two digits.

Catalog Information

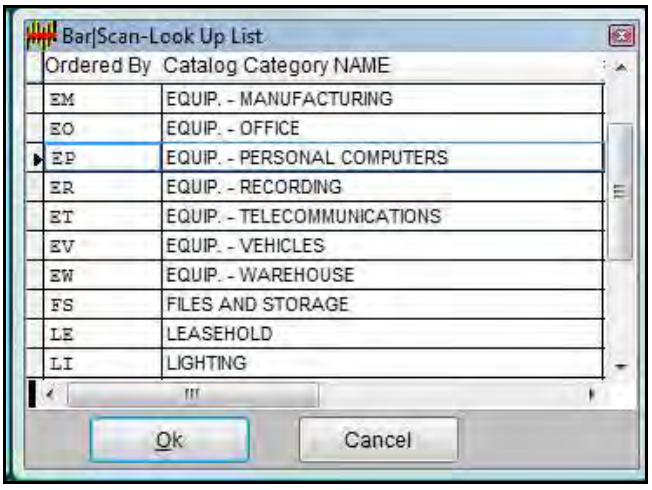
The Catalog identifies and defines the nature of assets. A Catalog Identification Number consists of a two-character Category and a four-digit Number. Bar|Scan provides a list of predefined Categories to identify groups of like assets. The Catalog Numbers describes that specific type of asset.

The format of the Catalog (two-character Category and a four-digit Number) can be modified using the User Defined Fields Module. This is not recommended unless for a specific purpose such as interfacing with a Legacy system.

Category

The Bar|Scan system provides a list of predefined general asset categories. Categories are used to quickly identify a particular group of assets with the same general description.

When you press right click on this field or press F5, then select Look up Value, a look up window similar to the one below will appear.



You may select one of the categories by entering the two letter code, using the mouse, or by moving the highlight bar to the desired item and pressing ENTER, or by clicking the OK button.

You may also add a category of your own design. You have to add the Category in the Catalog, Categories table. Then, you have to add a valid catalog number before you may use the Catalog (XX9999) in the Asset table. Please see the *Catalog* chapter in this User Manual for more information.

Catalog Number

The Catalog Number defines the specific asset description based on the different choices established using the Bar|Scan Catalog feature.

The Bar|Scan Catalog feature permits you to define and assign numbers to different assets in a way most meaningful to your organization.

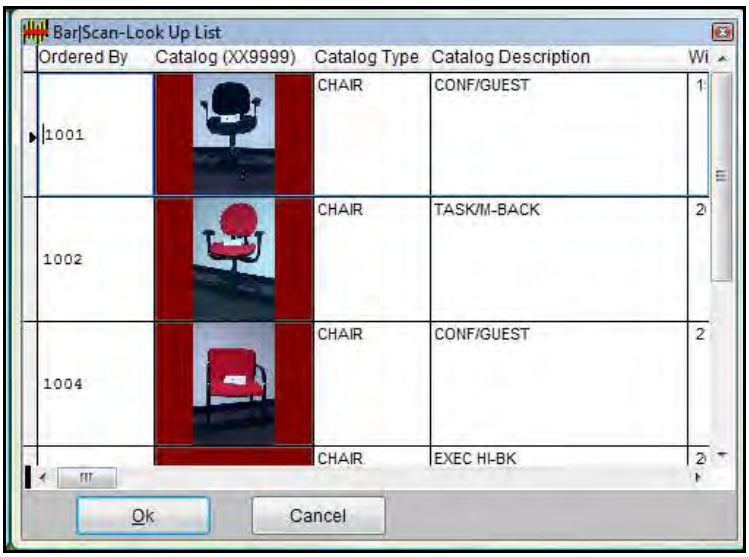
When you right click on this field or press F5, then select Look up Value, a look up list similar to the following will appear.

The above window will display **existing** Catalog Numbers for the Category previously selected.

Select one of the Catalog numbers by moving the highlight bar to the desired number and then press ENTER.

After you select a Catalog Number, a Type and Description will be displayed on the Entry Screen (if a Type and Description are listed as part of that Catalog).

As you can see from the Look Up list below, as in other Browse Windows, you can Right Click on any Catalog (XX9999) or Asset Number column title and view images, if they are available.



Hint: If you cannot find the Catalog you want, you can hyperlink to the Catalog table by clicking on the red underline. Once in the Catalog table, add a new Catalog, save the Catalog, and then use the new Catalog number in the Asset table.

Type and Description

The Type and Description are automatically displayed for you when you enter a valid Catalog number (if Type and Description are filled out in the Catalog table for that particular Catalog).

You may however, not know the Catalog Number you want to use, and may use these items to locate the Catalog Number.

Hyperlink to the Catalog table. Sort the information by Catalog type and description by using the Set button on the tool bar.

Use the seeking feature and the cursor movement keys to browse through the list of items.

If you find the correct item, note the Catalog Code (XX9999). Return to the Asset Display Screen and enter the Catalog Code.

The correct Type and Description will be displayed, according to the Catalog Code you have entered.

The length of the Type and Description fields can be modified using the User Defined Fields Module.

Quantity

Bar|Scan will allow you to track assets without the need to apply individual bar code labels. The Mobile Device can perform an inventory prompting for Quantity instead of Asset Number.

You can use the Quantity inventory in both the TAG and TAKE mode of the Mobile Device.

For more information on using the Quantity prompt with the Mobile Device, see *Chapter 11 - Bar|Scan Mobile*.

The following briefly describes how the Quantity prompt works. When the Mobile Device is in Quantity Mode, asset numbers are not entered into the Mobile Device, but created by Bar|Scan once the information is uploaded and validation takes place. These newly created asset numbers are called "Z numbers" because the left most character of these asset numbers always begins with the letter **Z**. The numbering scheme is alpha numeric. The asset number length is the same as your normal asset number length.

Bar|Scan will automatically keep track of what Z numbers have been used, and continue the assignment at the next upload of quantity items.

You simply need to enter into the Mobile Device: where the items exist, the Catalog Code (XX9999), and how many items there are. If you use the Purchase Order number or other fields, they will also be considered when creating unique Z numbers.

You determine which combination of fields will make a Z number. This is done on the Company Settings Screen on the Qty Assets Tab. It is important to decide this combination before entering your first items.

You may also collect additional information not related to the combination of fields discussed in the prior paragraph. Be careful that the information collected reflects information about the entire group of assets. For example, you may want to collect condition. You may want to enter the condition into the Mobile Device as Good, but if you say Good, all of the items you are counting for that one Catalog should be in Good condition.

The following is a sample of the asset numbering scheme that Bar|Scan uses:

ASSET # FIELD	QUANTITY FIELD	ROOM TAG LOCATION	CATALOG
Z00000	5	L00050	SE1054
Z00001	2	L00583	SE1089
Z00002	3	L00583	TA4100
Z00003	6	L00032	SE1054
.	.	.	.
.	.	.	.
.	.	.	.
Z00009	9	L00393	EP1003
Z0000A	20	L08092	EO1489
Z0000B	10	L09802	EO1489
Z0000C	5	L00033	TA4100

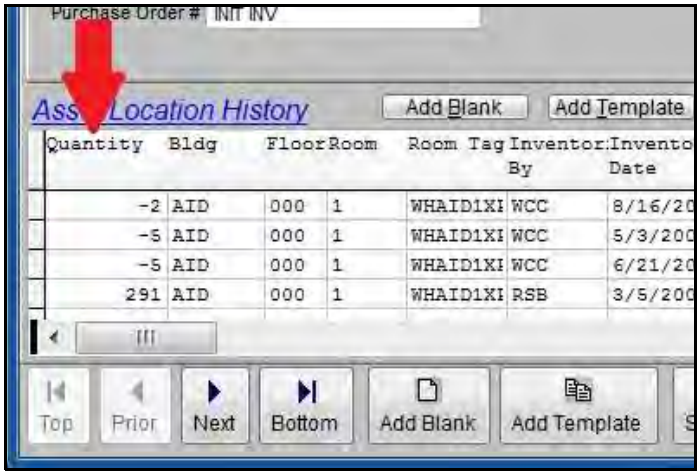
As you can see from the above example, Bar|Scan assigns a Z Number to each combination of unique Location and Catalog (and other optional fields determined by you).

Z Numbers are most often used in warehouse settings where you want to know how many of each asset is located at each pallet location but do not want to bother with the application of a bar code label.

You can put more than one kind of asset at a pallet location (different Catalog numbers) and you can put the same kind of asset at more than one location.

When you perform a second inventory to update your existing Z numbers (TAKE Mode with the Mobile Device without using a 'From' and 'To' Location), you will enter in the actual quantity on hand. For example, if there are 2 SE1054 items located at Location L00050, enter 2 into the Quantity Prompt of the Mobile Device. When this information is Synchronized with the Bar|Scan system, validated and moved from the Transaction to the Asset Table, the Current Quantity will show 2.

Bar|Scan maintains this accuracy by adding an adjustment entry into the Asset Location History as shown below.



Note that this adjustment entry is only made for quantity inventory or 'Z numbers' and only in the case where the Mobile Device is configured with only one location.

Because of the Transaction Validation process, you might need to change Error 46 from an Error to a Warning so that these Transactions will move.

Prior Label

The Prior Label field is used to show the old Asset label when you have had to replace an Asset label with a new one.

When doing a Take (inventory done on an asset that already has an existing bar code label in the Bar|Scan system) with the Mobile Device, you may occasionally find assets that have a worn or unreadable asset tag on them. You can easily replace this old tag, and still retain all of the history of the asset by doing a label replacement.

Simply scan the **new** asset number in the Mobile Device, then you will be prompted to replace the bar code label, if you are replacing the label, simply cursor up to respond Yes, and then scan or enter the **old** asset number. Remove the old asset label, and replace it with the new one. When the information is uploaded, and then validated, the history of the asset is saved with the new asset number, and the old number appears in this Prior Label field.

Secondary Asset Number

This item is optional, provided to permit you to enter another identifying number of your own choosing.

Often, the Secondary Number is used to record an asset number from an asset numbering system in use prior to the installation of Bar|Scan or a second tag applied by a different agency.

Bar|Scan can produce reports containing selected items and sort by the Secondary Number. This simplifies comparison and analysis with reports generated by previous software applications.

Type the desired characters and press ENTER.

System Number

This item is optional and is used to record a number linking items together creating a *System*. For example, to link a Personal Computer with its components, i.e., Monitor and Printer, scan the Personal Computer's bar code asset tag into the System Number on the Mobile Device. In this example, no matter how many Personal Computers are in a particular location, you will be able to identify each *Computer System* separately.

System Number can also be used to link other types of assets including workstations and specialized equipment.

Type the desired characters and press ENTER.

Serial Number

This item is optional and is used to record the manufacturer's serial number of the asset.

Note that many manufacturers now include a bar code label on their product which will identify the product serial number. Bar|Scan permits you to scan this code with the Mobile Device which will enter the serial number automatically.

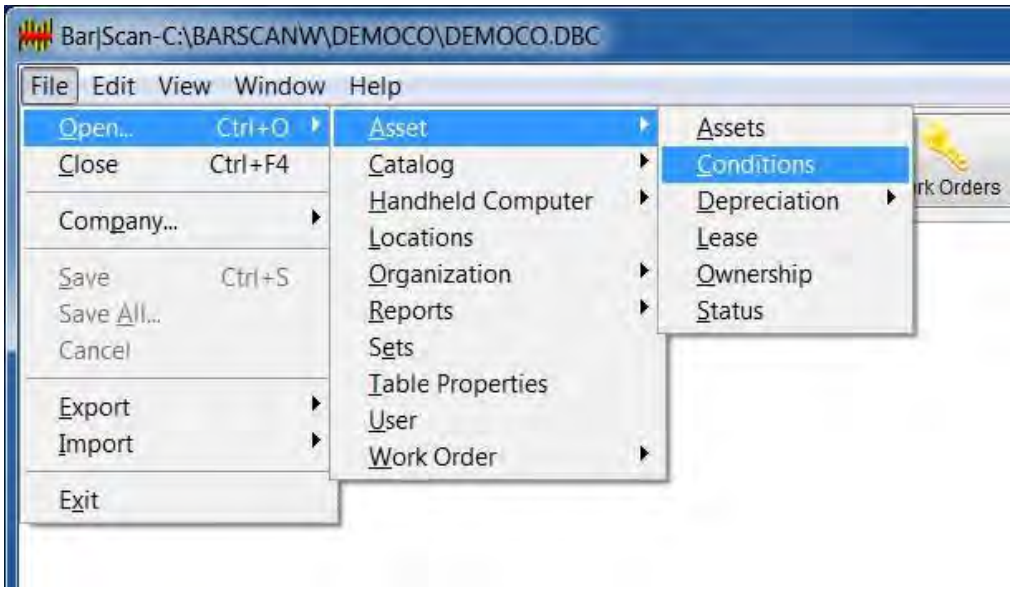
Normally, the Serial Number must be unique. However, if you wish, you can turn off the validation feature in Housekeeping and save assets with duplicate Serial Numbers.

Type the desired characters and press ENTER.

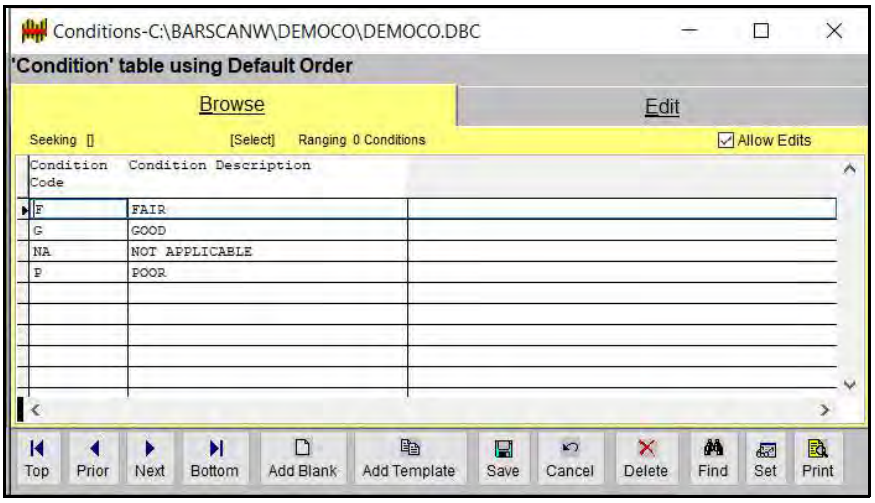
The Condition Table

This entry describes the current physical condition of the asset. The following are predefined responses: Good, Fair, Poor, or Not Applicable. You may, however, add to, change, or delete these responses to meet your individual needs. As with other fields, the length of the code and response can be changed using the User Defined Fields Module.

When you want to change, add, or delete valid responses for the Condition field, you will need to open the Condition table. From the Main Menu, select File, then Open ...▸, then Asset ...▸, then Conditions as shown on the following example.

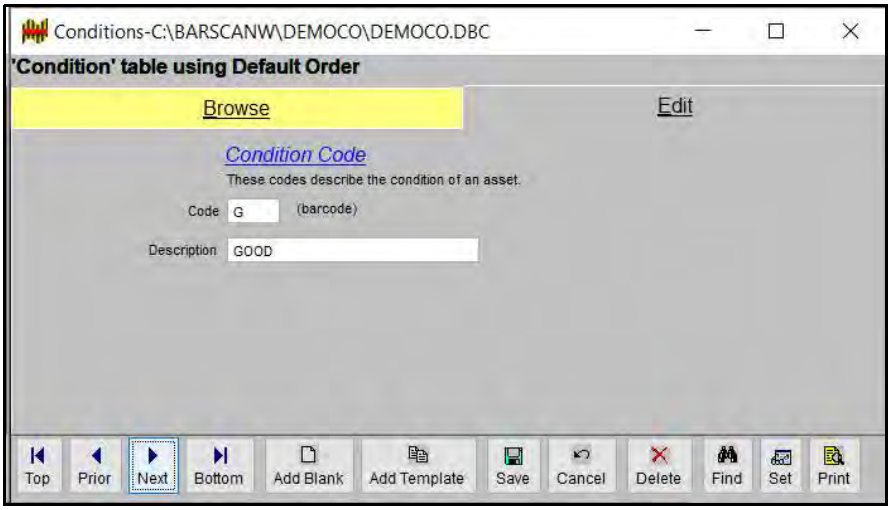


You will be shown a screen similar to the following.



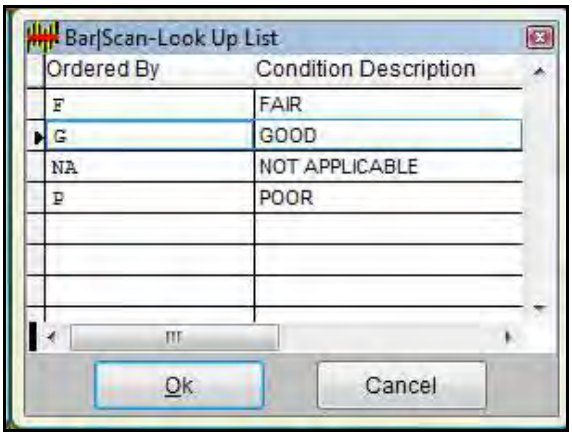
You may add new responses according to your needs. You have an unlimited number of possible choices. A blank entry is also a valid response but you must add it to the Condition table.

When you need to add a condition response, simply select the proper condition, choose add blank or add template, then select the Edit tab. If you are changing a condition, simply select the condition you wish to change, then select the Edit tab. An Edit tab, similar to the one below will appear.



Note: You can synchronize these Conditions into the Mobile Devices.

While on the Asset table, and on the Condition field, you can right click or press F5, and select Look up Value, a look up window similar to the one below will appear.

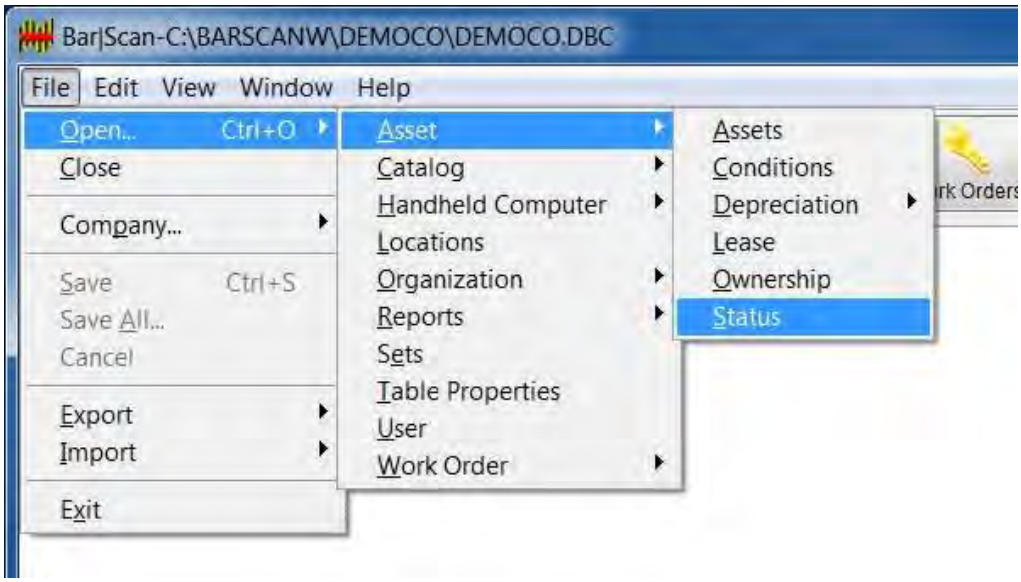


You may either enter the appropriate letter(s), or move the highlight bar to your choice and press ENTER. If you are proficient in use of the system, you can enter a Condition without using the F5 key by simply typing it into the field.

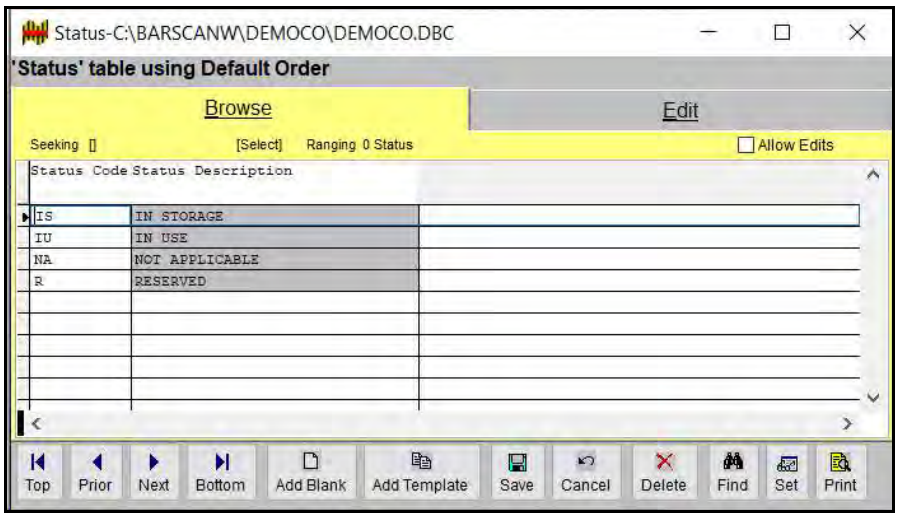
The Status Table

This entry describes the current status of the asset. There are some predefined choices already listed in Bar|Scan. You may, however, add to, change, or delete these responses to meet your individual needs. As with other fields, the length of the code and response can be changed using the User Defined Fields Module.

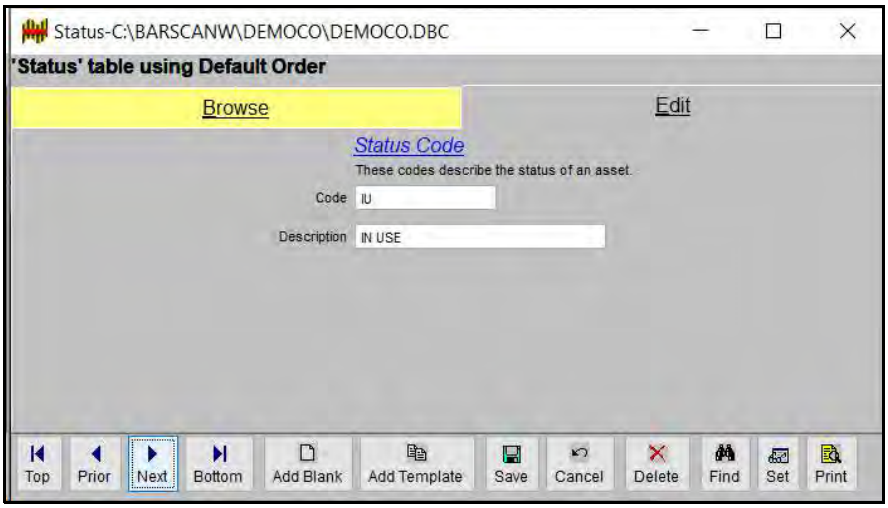
When you want to change, add, or delete valid responses for the Condition field, you can simply use the hyperlink feature to go to the Status table by clicking on the red underlined word on the Asset table. Or you can open the Status table from the Main Menu, by selecting File ...▸, then Open ...▸, then Asset ...▸, then Status as shown on the following example.



When you select Status from the Main Menu, you will see a window similar to the following.



If you need to add or change a Status response, simply select a like response from the above list, and select the Edit tab. You will be shown a window similar to the one below.



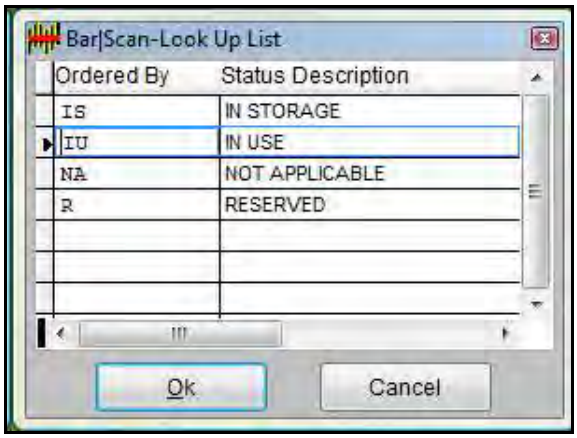
On this tab, you may add a new code, or change an existing code. Press the Save icon on the toolbar, or the Ctrl + S key combination to save your new Status response.

You may add new responses according to your needs. You have an unlimited number of possible choices. A blank entry is also a valid response but you must add it to the Status table.

If you are using the 445 Period Type of depreciation, you will want to add a Status Code ID with a Status Description of IDLE.

Note: You should make sure that all of your Mobile Devices are configured to have the same responses available as in the Status table. Otherwise, when the information is validated in the Transaction table, each record will display an error message saying that the Status should be IU, IS, etc.

When you right click on the Status field or press F5, and select Look up Value, the following look up window will appear.



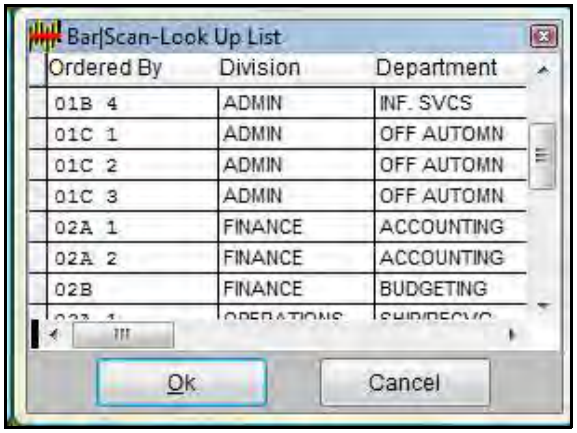
This look up window will show you all of the existing Status responses that are currently in your Bar|Scan system. You may enter either the appropriate letters (IU, IS, or NA), or move the highlight bar to your choice and press ENTER.

Organization Code

This code is used to identify the different combinations of Division, Department, and Unit.

The Division, Department, and Unit are associated with the Organization Code inside the Organization table. So, you may select an Organization Code in lieu of entering the Division, Department, and Unit.

When you move the cursor to the Organization field and right click or press F5, and select Look up Value, a look up window similar to the following will appear.



The information inside your window will reflect what has been entered into your Organization table. Move the cursor to the desired item and press ENTER.

When you select an Organization Code, the associated Division, Department, and Unit will be automatically displayed on the Asset table below the Organization Code field.

If you need to Add, Change, or Delete an Organization Code, you may use the hyperlink feature to open the Organization table. While on the Asset Table, simply click on the red underline for the Organization code, and the Organization table will open.

The Division, Department, and Unit entries are provided to permit you to identify the different organizations which have possession and responsibility for the asset. You may identify from zero to three different organizational levels. Your choice for these entries will depend on the nature and structure of your particular company.

For example, the organization responsible for a particular Personal Computer might be the West Coast Division, the Accounting Department, and the Accounts Payable Section.

These entries permit you to describe assets for which the physical location may not coincide with the organizational responsibility for the asset.

Using the previous example, the A/P section may have the use of a mainframe computer terminal which is the responsibility of the Data Processing Department.

As with other fields, the length of the Organization Code as well as the Division, Department, and Unit can be changed using the User Defined Fields Module.

Current Owner Information

The Ownership information identifies how the asset is owned or how it was obtained: leased, purchased, customer furnished, etc. To help identify specific asset locations, the name and telephone number of the person using the asset can be entered.

Owner Method

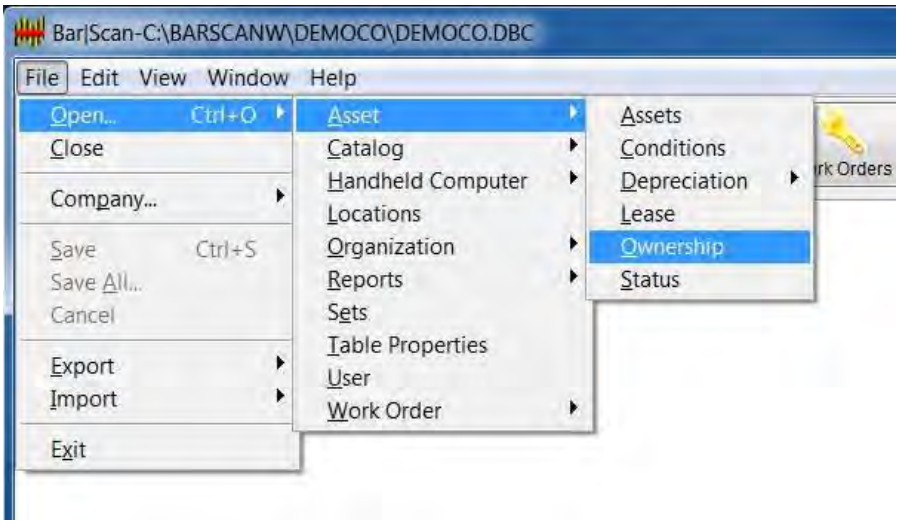
This entry identifies how the asset was acquired. Bar|Scan provides several different choices depending on how the asset was financed or otherwise obtained.

Place the cursor in the Owner Code field, right click or press F5, and select Look up Value, a look up window similar to the following will appear.

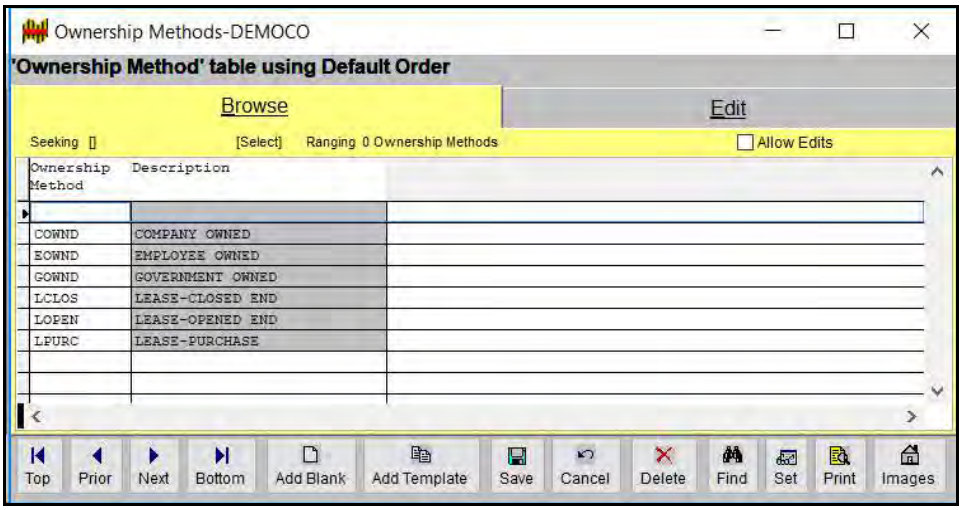
You may select one of the choices, or press ESC to leave the entry blank.

The Ownership Table

If you want to add, change, or delete choices from this look up window, you will have to open the Ownership table. You can open the Ownership table by clicking on the red hyperlink on the Asset table, or by going to the Main Menu in Bar|Scan, and select File ...▸, then Open ...▸, then Asset ...▸, then Ownership as in the following example.



You will be shown the following Ownership table.

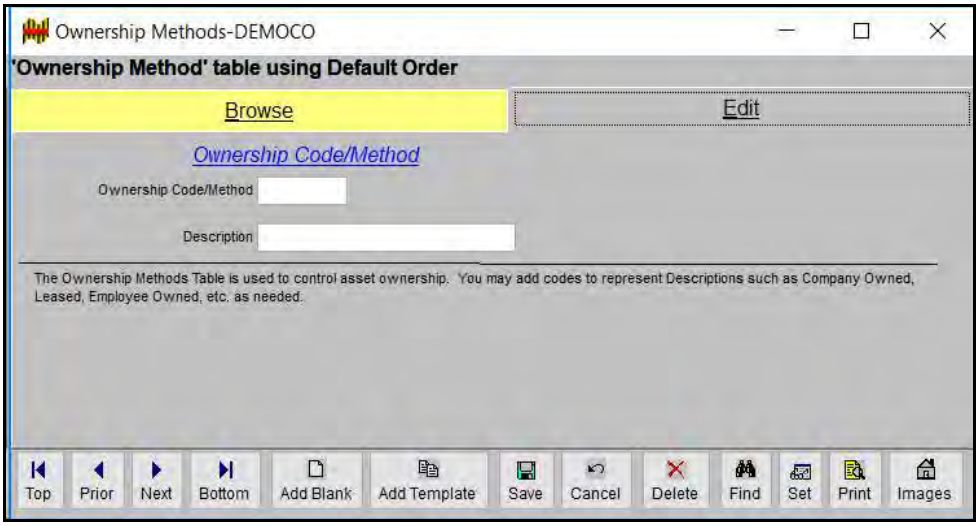


You may add, change, or delete the items listed according to your needs.

If you wish to **delete** an Ownership Method, simply Range the item on the Browse tab, and press the Enter key. Then, select the Red X delete button from the tool bar.

If you wish to **add** an Ownership Method, simply select a like item to the one you want to add, and select the Add Template button on the tool bar. Select the Edit tab, and change the fields to display the new Ownership Method. Save your changes by clicking on the Save icon or press the Ctrl + S key combination.

If you want to **change** an item then select the response that you want to change, then select the Edit tab which is illustrated below.



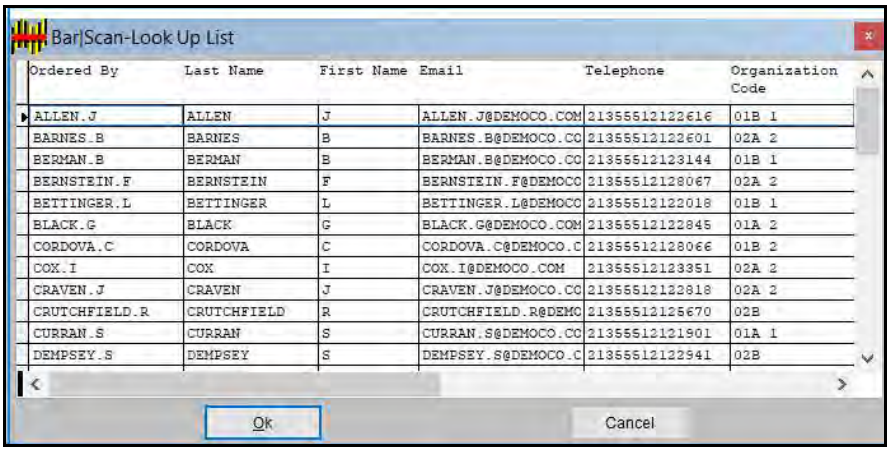
Change the information that is incorrect, and save your changes by clicking on the Save icon or press the Ctrl + S key combination.

Name

This entry is most often used to identify the name of the person using (or responsible for) the asset.

Some companies prefer to use the name of a supervisor or department head.

Place your cursor in the name field, right click or press F5, then select Look up Value, a look up window similar to the following will appear.



You may select one of the names, or press ESC to leave the entry blank.

You may move the cursor to the desired part of the entry and type in the name without using the look up window. Bar|Scan will update the look up value automatically when your new entry is saved.

The Name entry can be collected with the Mobile Device and is also saved as part of the Location History Table. Therefore, every time you use the Mobile Device, you can collect a new name; the name previously scanned will be retained.

We recommend that you open the Personnel Table and enter or import your names from your existing personnel list. As with other fields, the length of the Name field can be changed on the Company Settings Screen. The Personnel Table has additional Fields to hold employee related information such as their Employee ID and email address.

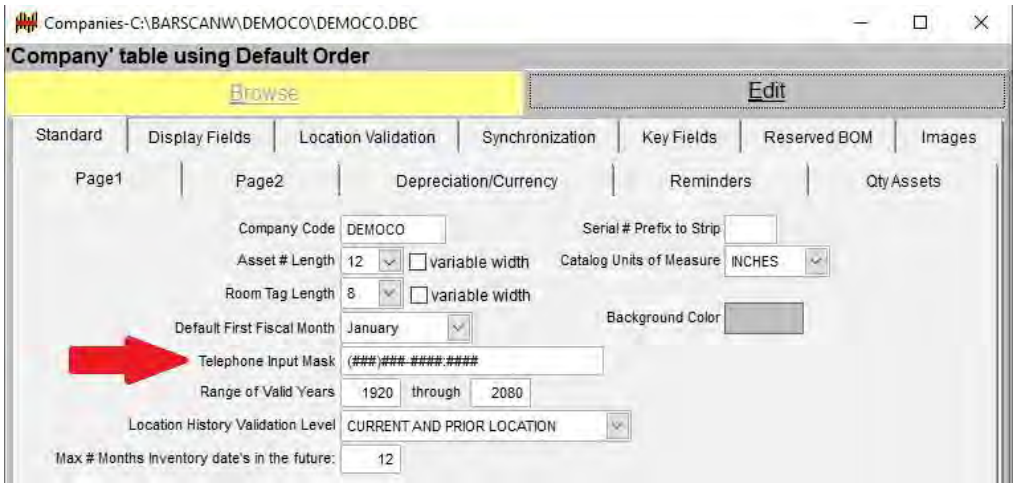
Hint: think carefully before using the Name entry. The more items you enter, the more work it will be to maintain the accuracy of the system. Because of churn and turnover, it may require a lot of effort to maintain this item.

Telephone

Bar|Scan permits you to enter the area code, telephone number, and extension number of the individual responsible or using the asset. You may enter any or all of the numbers.

Move the cursor to the desired part of the entry and type in the numbers.

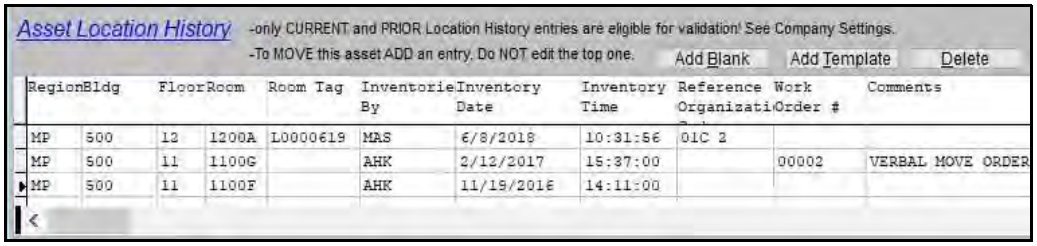
You can change the default telephone format by accessing the Company Settings Screen and modifying the existing Input Mask as shown below.



For example, the default is “(###)###-####:####”, if you were only interested in the last five digits and did not have extensions, you could change the format to “#:####’.

CURRENT AND PREVIOUS LOCATIONS

One of the important features of Bar|Scan is the ability to define a specific physical location for each asset. The location information for each asset can be viewed near the bottom of the Edit tab as shown below.



Region	Bldg	Floor	Room	Room Tag	Inventorie By	Inventory Date	Inventory Time	Reference Organizati	Work Order #	Comments
MP	500	12	1200A	L0000619	MAS	6/8/2018	10:31:56	01C 2		
MP	500	11	1100G		AHK	2/12/2017	15:37:00		00002	VERBAL MOVE ORDER
MP	500	11	1100F		AHK	11/19/2016	14:11:00			

Bar|Scan also provides historical location information. Previous locations may be displayed by using the scroll bar at the right of the location. All prior locations are displayed sequentially. You can scroll, using the arrow keys or mouse, through all of the recorded previous locations.

You can customize your display by changing the order of the columns by clicking on the title bar for that column, holding the mouse button down, and dragging the column to a new location. The rest of the columns will move to fill in the space.

Each time an asset is moved, you will want to record the new location and move the *Current* location to the *Previous* location. The Mobile Device will do this automatically.

An asset location is can have one of three types. These are Site, Pallet, and Vault. Bar|Scan has named these four levels for the Site type of location: Region, Building, Floor, and Room. The selection of these level titles is based on the most common industry practice. However, you may use a scheme which is appropriate for your particular organization. The important thing about a location code scheme is that it will precisely locate any and all of your assets in all of your company facilities.

The four location code entries are designed to be used in a hierarchy. This means the lowest level (the Room identification) is located within the next higher location level (the Floor identification), which is located within the next higher location level (the Building identification) which is located within the highest location level (the Region identification).

Note that the number of levels used, the definitions of the different levels, and the actual codes entered are defined by you and should be developed prior to entering assets into the Bar|Scan system.

You can optionally assign a Location Description to the four location codes as well as a Bar Code Room Tag to assist the inventory process. The Bar Code Room Tag is usually placed on the door jamb, column, or other permanent location during the course of your first inventory.

Bar|Scan also provides historical location information. The most recent prior location is displayed. Previous locations may be displayed by moving the cursor to the Location History button and then press ENTER. A look up window will appear showing all of the previous locations. You can scroll up or down through the list of previous locations if more than three locations exist.

Each time an asset is moved, you will want to record the new location and move the *Current* location to the *Previous* location. **This is done automatically by use of the Mobile Device.**

Inserting and Deleting Locations

When an asset has been moved, the easiest and fastest way to document the change is to do a physical scan with the Mobile Device. But, it is possible to change the information in the Asset table using the keyboard to record the new location. You will need to perform the following steps.

Go to the location section of the Edit tab screen, then select the current location. Select the Add Template, or Add blank button to the left of the location. Bar|Scan will insert either a blank line or a template of the current location. Simply edit this location, making changes where necessary.

You may enter the new location information, right click on the current field or press F5, and select Look up Value. A look up window will appear showing all of the valid locations from which to choose.

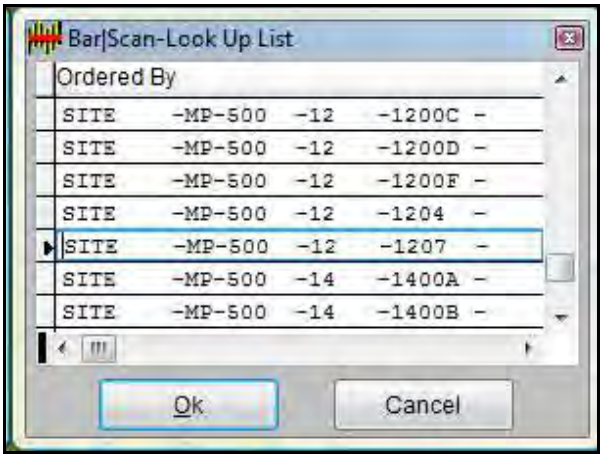
You may also remove the current or any previous location by positioning the highlight bar over the location and pressing the Delete button, located on the left of the location. You will be asked to confirm your deletion choice.

If you have used a template to add the new asset, you will want to remove the current and previous locations. This is accomplished by positioning the highlight bar over each location, and clicking on the delete button.

Alternatively, you can type a new location over the previous location, or use the F5 key and choose Look up Value to list all locations and select a new location. Note that each site location is a combination of a Region, Building, Floor, and Room. If you change one of these items, you must select the appropriate corresponding items. Therefore, unless you are familiar with all of your locations, the best way to add or change a location is by using the Look up Value.

Region, Building, Floor, Room

Move the cursor to any of these items and right click on the field or press F5, then select Look up Value, a look up window similar to the following will appear.



You can select from the list in the window to enter the rest of the location items or you can press TAB to go to the next location item.

Most often, these codes will be entered by using the Mobile Device during a TAGging or other inventory process.

Room Tag

A Room Tag is a bar code label which is used to identify a specific location. The label is usually affixed to a door jamb leading into the particular area or room.

Here is how it works: The first time a particular set of location codes is entered, a Room Tag number is assigned to that location. This can be accomplished when all five bar codes are scanned, Region, Building, Floor, Room, the Room Tag, and the information is uploaded. When all five codes are used together, the program associates the information. After that, when a Room Tag number is entered into the system, the location codes will automatically be displayed without having to scan them.

This feature will save you considerable time when you take inventory as you will only need to scan the Room Tag rather than scanning it and the other location codes, i.e., Region, Building, Floor, and Room.

If you wish to enter a new Room Tag number using the keyboard, first identify a set of location codes. Then type the Room Tag characters into the Room Tag field and press ENTER. Most often however, Room Tag numbers will be entered using the Mobile Device.

Work Order Number

An entry is provided to record a Work Order Number associated with the asset. This can be manually entered. If you have the Work Order Module, you will want to use the Mobile Device to collect the Work Order Number generated when Work Orders are entered.

If you do not have the Work Order Module, you may use the Work Order Number field to enter a number which authorized moving the asset, i.e., a purchase order number to a moving company, a purchase order number which ordered the asset, an internal work authorization number, or a number used to identify a move. The Work Order Number can indicate when the asset was placed in service at the current location.

Description

The Location Description identifies more detailed information than can be obtained by the Region, Building, Floor, and Room combination. For example, a Location Description could be "Workstation Type 5 - Open - Disability Accessible" or it could be as simple as "Conference Room - Large."

The Location Description is not an independent item. Rather, each Site Location Description is linked to a Region, Building, Floor, and Room.

The Location Description is automatically entered when you select a particular Region, Building, Floor, and Room when that location has the description filled out in the Location table.

You can move the cursor to the description field and type the appropriate characters. Or place the cursor in the Location Description field and right click or press F5, and select the Look up Value, and then select a Location Description, the corresponding Region, Building, Floor, and Room will also be changed.

The Location Description field in an Asset table, will work with and update the entire Pallet or Vault type of location as well.

When you update the Description for a Pallet location, the Building, Row, Bay, Slot, and Level will also be updated.

When updating the Description for a Vault location, the Building, Vault, Row, Bay, and Level will also be updated.

Move By, Move Date, and Move Time

When adding an additional line to the Location History, this information is automatically filled in for you, using the login initials, the current date, and the current time. If you would like to make changes, place your cursor in the field you wish to change, and type in the new information.

Note: You are not allowed to enter a future date. Because Bar|Scan relies on dates to sort location history, entering a future date could have serious side effects, and is therefore not allowed.

When the inventory information is entered using the Mobile Device, the system automatically uses the current information entered into the Mobile Device. The user's initials, the date, and the time from the bar code reader should, therefore, be checked EVERY time the Mobile Device is used.

Managing the Arrangement of Asset Location History Columns on the Asset Screen

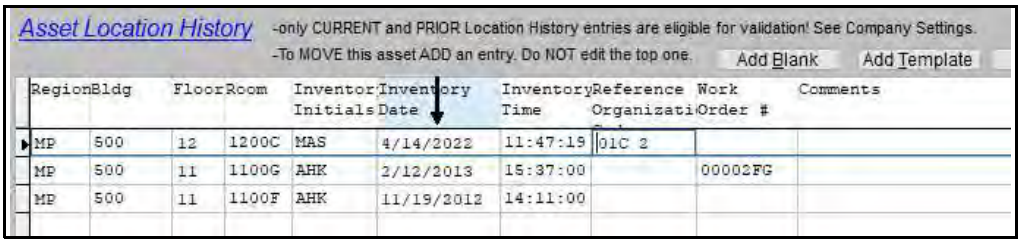
When you select the Edit Tab on the Asset Screen, you are presented with details about each individual asset. The lower section is titled 'Asset Location History' and displays all locations where the asset was located during a physical inventory. In other words, this is the history of the asset's location.

Most locations are added during the physical inventory process, however, locations can be added or changed manually at the keyboard also. For example, if an asset was accidentally entered into the wrong location, you can correct the mistake manually at the keyboard.

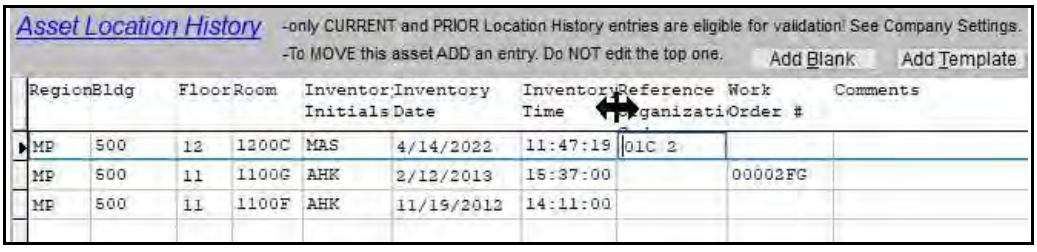
By default, there are many columns displayed and they are displayed in a particular order. This arrangement may not be suitable for every user.

There are six editing actions that can be performed on the columns. These are:

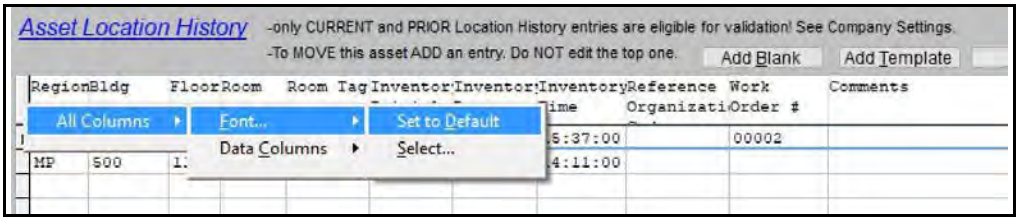
1.) Move columns - You change the order of the columns in a Browse window. Simply place your mouse on a column header, and it will turn into a thick black arrow. Left click and hold the mouse button down, and drag the column to the left or right.



2.) Stretch or shrink columns - You may also change the width of a column by placing your mouse on the line that divides the columns (still in the shaded header area). When the mouse pointer changes into a plus shape with a double arrow, you may left click, hold the mouse button down, and drag the edge of the column to the left or right.

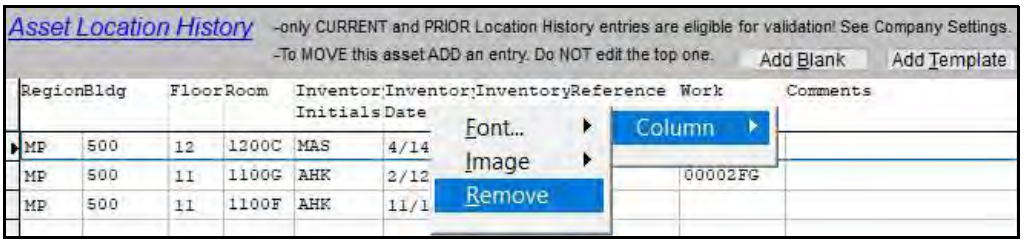


3.) Change font of columns - Place your mouse on a column header and right click. You will see a menu with three choices. Font, Image and Remove. Right Clicking on any title will allow you to change the font on that column separately. You can set the column to the default font or you can select a new font for the column. You can also change the font on all of the columns if you right click in the very left hand box you will see an item to change the font on all columns as shown below.



4.) Add images to columns - Place your mouse on a column header and right click. For most columns, you will see a menu with three choices. Font, Image and Remove. By selecting Image, the data will be replaced by the image associated with the data provided that the image exists in the image folder. You may need to expand the row height to see the image detail.

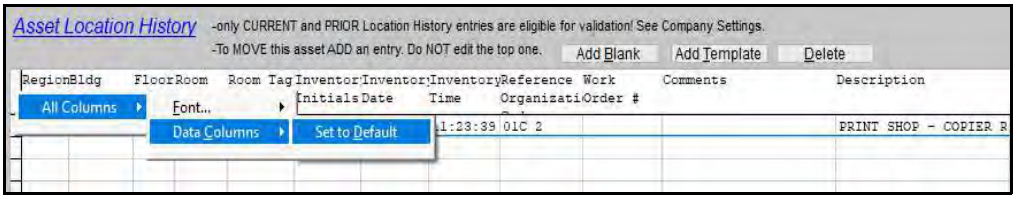
5.) Remove columns - Place your mouse on a column header and right click. Place your mouse on a column header and right click. You will see a menu with three choices. Font, Image and Remove.



6.) Restore columns -

a.) If it is a regular BarScan field and not a Location History User Defined Field (UDF) then Right click in the very left hand box you will see an item to change. Select 'Data Columns' then 'Set to Default'. This will restore all missing columns.

b.) If the field is a Location History User Defined Field (UDF) then the removal of the column is only temporary in the Asset Screen. It will reappear every time the Asset Screen is closed and reopened, since the 'Visible in Detail' checkmark in the UDF definition takes priority.



THE SECOND TAB - INVENTORY

Scan Information

These entries are used to identify the person, date, and time of the last inventory. Usually this information will be entered into the Mobile Device during the physical inventory and then loaded into the Bar|Scan system in the computer.

A field is provided for special comments regarding the asset.

Inventoried by, Inventory Date, and Inventory Time

These three items will be recorded by the person using the Mobile Device during the inventory or tagging process.

Since these entries are collected by the Mobile Device, they cannot be changed except through the location history line items.

Note that you are not allowed to enter a future date. Future dates are marked as errors in the Transaction Table. Because Bar|Scan relies on dates to sort location history, entering a future date could have serious side effects.

Comments

An entry is provided to record a Comment associated with the asset. This can be manually entered or updated using the Mobile Device.

Most often, comments will be entered by using the Mobile Device during a TAGging or other inventory process. When you use the Mobile Device, they are moved from the Inventory Information Area to this area.

Comments are often entered into the bar code recorder during an inventory. However, comments may be entered at any time using your keyboard.

This item can be used to enter comments about any aspect of the asset, not just comments about an inventory, i.e., scratched or dented.

Disposal/Sale

Disposal Date

The Disposal Date is the date that you choose to assign to the disposal, retirement, or sale of your asset. It can be derived from a disposal document.

Enter the date by moving the cursor to the desired item, typing the characters and pressing ENTER.

The Disposal/Sale information that you enter does not remove the asset from the Asset table.

See *Disposal of Assets* in *Chapter 2 - Suggested Procedures* for more information regarding procedures you may wish to consider in handling disposal.

To remove an asset from the asset file you may use the Delete button in the tool bar.

Disposal Type

This entry identifies a Disposal Type for your asset. It can be any single character of your choice. Since it is an optional item, it can also be left blank.

Move the cursor to the desired part of the entry and type a character. Since this is a single character, there is no need to press ENTER when finished.

Sales Value

The Sales Value can be any number that you decide to assign to the disposal or sale of the asset. It is an optional item and does not affect other information on the screen. Your accounting department may have guidelines it uses.

Buyer

The Buyer is optional information that you may enter to record who received the asset upon disposal or sale.

Enter the Buyer by moving the cursor to the desired item, typing the characters and pressing ENTER.

Remarks

There are three independent lines of Remarks available. They can be used in conjunction or independently. Remarks may be entered at any time. They can be used to enter comments about any aspect of the asset, not just financial comments. Each remark line can be printed independently by the Report Generator.

Enter remarks by moving the cursor to the desired item, typing the characters and pressing ENTER.

As with other fields, the length of the Remarks field can be changed using the User Defined Fields Module.

Important: Remember to press the Ctrl + S key combination or the Save icon to save your work prior to leaving the Asset Entry Screen.

THE THIRD TAB - ACCOUNTING

Asset Information

Purchase Order Number

Bar|Scan permits you to enter any alphanumeric Purchase Order Number for the asset or group of assets you are working with.

Move the cursor to the desired part of the entry and type in the number. When the entry is complete, press TAB or the Enter key.

The Purchase Order Number can also be collected with the Mobile Device.

Vendor

This entry identifies the vendor of the asset.

Move the cursor to the desired part of the entry and type in the desired information. When the entry is complete, press TAB.

The Vendor is normally not the Manufacturer of the asset, but the seller of it. However the list of Vendors will be stored in the Manufacturer table.

To change the Manufacturer, you may click on the red underline to hyperlink to the Manufacturer table. Once at the Manufacturer table, you may add, correct, or delete a Manufacturer or Vendor.

Purchase and Received Dates

The Purchase Date indicates when the asset was purchased. Generally, it reflects the date indicated on the Purchase Order number used to procure the asset(s).

The Received Date indicates when the asset was received by your company or department. It can be the date that the asset was delivered to the company or when the asset was put into service by your department.

Whatever method you choose to specify the Received Date, it is best to be consistent for all of your assets.

Enter these dates by moving the cursor to the desired item, typing the characters and pressing TAB.

New Or Used

This entry identifies whether the asset was new or used at the time of purchase. Since it is an optional item, it can also be left blank.

Move the cursor to the desired part field and right click or press F5 and select Look up Value. A look up window will appear and you may select the appropriate response. You may type either **N** for New or **U** for used. Since this is a single character, there is no need to press ENTER when finished.

General Ledger Numbers

There are spaces for three General Ledger numbers here.

The General Ledger Number is a number used to facilitate record keeping and internal control of your companies' financial records. Needless to say, in order to control assets by General Ledger number, you will probably have to consult your accounting department.

The General Ledger Number can be used as a Primary Link to your financial accounting system. Type the desired characters and press TAB.

As with other fields, the length of the General Ledger field can be changed using the User Defined Fields Module.

THE FOURTH TAB - BASIS

Valuation

Purchase Cost

The Purchase Cost indicates what was paid for the individual asset. Generally, it is the unit cost of the asset prior to the addition of other charges involved in the procurement.

If the Purchase Cost information you have is for a lot or group of assets, you must allocate a portion of the total cost to each asset. If the purchased group consists of all like assets, the cost can be divided evenly among all of the assets.

Alternatively, a “standard” Purchase Cost can be entered into the Catalog Table, which can then update all new assets automatically when these assets are first entered.

Note: Placing the Purchase Cost into the Catalog only updates new assets. It will not update existing assets, nor will it override any information that is already in the Purchase Cost field in your Asset table. You may change the Purchase Cost once the information is in your Asset table.

In any case it is best to consult your accounting department for proper allocation of this cost.

Remember: if you are working on more than one asset and change any information, all of the assets in your "range" can be updated. This can be of benefit if you want to assign a standard cost to a large number of assets. For more information on how to use the Range function, see *Chapter 5 - Operating the System.*

Enter the Purchase Cost by moving the cursor to the desired item, typing the numbers and pressing TAB.

Tax

Tax normally is the amount of sales tax paid on the purchase of the asset. Often it is important to keep this amount separate from other costs so that it can be used for quarterly sales tax reporting, or other financial requirements.

The Tax is not automatically calculated as a percentage of the Purchase Cost. Enter the Tax amount by moving the cursor to the desired item, typing the numbers and pressing TAB.

Installation and Freight

The Installation and Freight Costs indicate what was paid for the delivery and set-up of the individual asset.

If the Installation and Freight Cost information you have is for a lot or group of assets, you must allocate a portion of the total cost to each asset. If the purchased group consists of all like assets, the cost can be divided evenly among all of the assets. In some cases, especially with systems furniture, the installation cost will be one figure for an entire project.

In any case it is best to consult your accounting department for proper allocation of this cost.

Enter the Installation and Freight Cost by moving the cursor to the desired item, typing the numbers and pressing TAB.

Additional

Additional (Cost) is provided for those costs that are incidental or unique to your particular situation.

Enter the Additional Cost by moving the cursor to the desired item, typing the numbers and press TAB.

Total Cost

The Total Cost does not have a title, but is listed as the sum of the Purchase Cost, Tax, Installation, Freight, and any additional costs that were entered.

The Total Cost is a *calculated item* of information. This means that you do not need to enter the sum of the costs, as it is automatically done for you.

As mentioned before, the Total Cost is the cost for one asset only, if the cost information you have is for a lot or group of assets, you must allocate a portion of the total cost to each asset. If the purchased group consists of all like assets, the cost can be divided evenly among all of the assets. In any case it is best to consult your accounting department for proper allocation of this cost.

Salvage Value

The salvage or residual value is the estimated value of the asset at the end of its useful or depreciable life. This can be an estimate, but is most often based on an accounting standard such as 10% of the Total Cost.

In any case it is best to consult your accounting department for proper allocation of this value.

The Salvage Value is not automatically calculated as a percentage of the Total Cost. Enter the Salvage Value by moving the cursor to the desired item, typing the numbers and pressing TAB.

Base Amount

The Base Amount is a function of two numbers: the total cost and the salvage value.

The Depreciation Base is a calculated item of information. This means that you do not need to enter a number, as it is automatically done for you.

The Depreciation Base is the basis for calculating the depreciation expense.

Adjusted Base Amount

The above items are *calculated items* of information. This means that you do not need to enter these number, as it is automatically done for you.

They are a result of other entries made in the Depreciation portion of the data entry screen.

You can specify that the Report Generator print this item in the same manner that you can specify other items that you have entered.

THE FIFTH TAB - DEPRECIATION

Initial Depreciation

There may be times when you will have accounted for asset depreciation in another system prior to your purchase of Bar|Scan. When these assets are imported into Bar|Scan for the first time, you have the option of recording the Initial Depreciation so that Bar|Scan calculates the remaining depreciation on a modified base. This is discussed in more detail below.

Start Date

The Depreciation Start Date is the date that you choose to begin the depreciation expense. It does not need to be the same date as the purchase or received date. For simplicity, it is often rounded to the first day of the preceding month.

Whatever method you choose to specify the Depreciation Start Date, it is best to be consistent for all of your assets.

Enter the date by moving the cursor to the desired item, typing the characters and pressing TAB.

See a Word About Depreciation in this section for more information relating to how Bar|Scan ignores the day of the month for depreciation purposes.

End Date

The Initial Depreciation End Date is the last date that your other system performed its depreciation calculation on your assets. This may or may not be the same date as the date you import your assets into Bar|Scan.

Accumulated

The Initial Accumulated Depreciation is the calculated amount of depreciation performed by your other system on the Initial Depreciation End Date discussed above.

This information is normally imported. Bar|Scan does not calculate this item.

Bar|Scan will calculate the remaining depreciation based on the information contained in the Initial Depreciation End Date and Initial Accumulated Depreciation fields. For example, if an asset had previously been depreciated at an accelerated rate, and you now specify straight-line, Bar|Scan will apply the straight-line method only to the remaining balance and remaining months of depreciation.

Method

You can enter the method of depreciation used prior to importing the assets into Bar|Scan. This information is static and not used by Bar|Scan for any calculations.

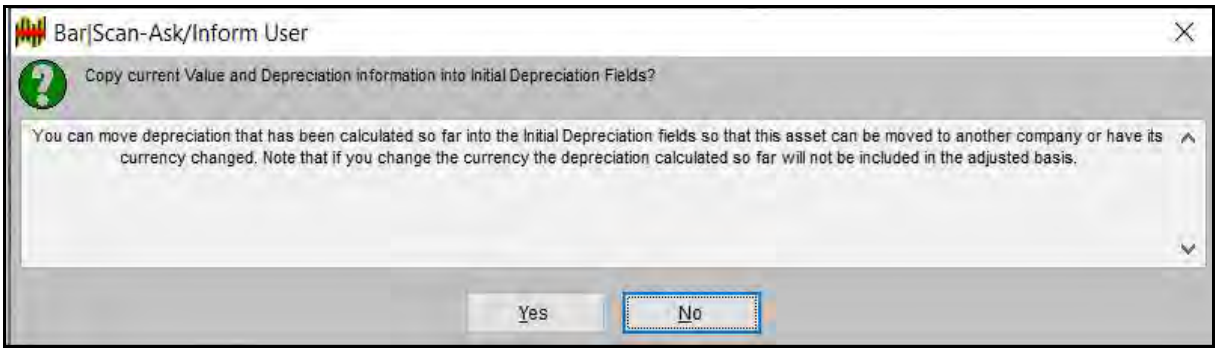
Note

You may enter any notes that may be relevant to the import, for example the file name that was imported.

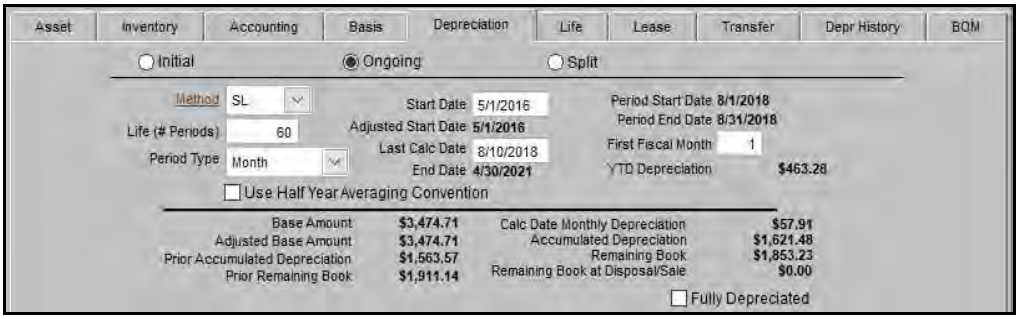
You can specify that the Report Generator print any of these items in the same manner that you can specify other items that you have entered.

Initialize Initial Depreciation

The Initialize Initial Depreciation Button is used to copy the current Value and Depreciation fields into the Initial Depreciation Fields. When you press the button, you will see the following panel.



There are only a limited number of reasons to perform this function. It is best to consult with your Bar|Scan Administrator before performing this function as it has important financial ramifications.



Ongoing Depreciation

Method

There are many different methods available for depreciation of fixed assets. Standard accounting practices require that whatever method is chosen, it be "systematic and rational."

Because of its simplicity, the most widely used method for fixed assets at this time is the **Straight Line** Method. The straight line method is calculated as follows:

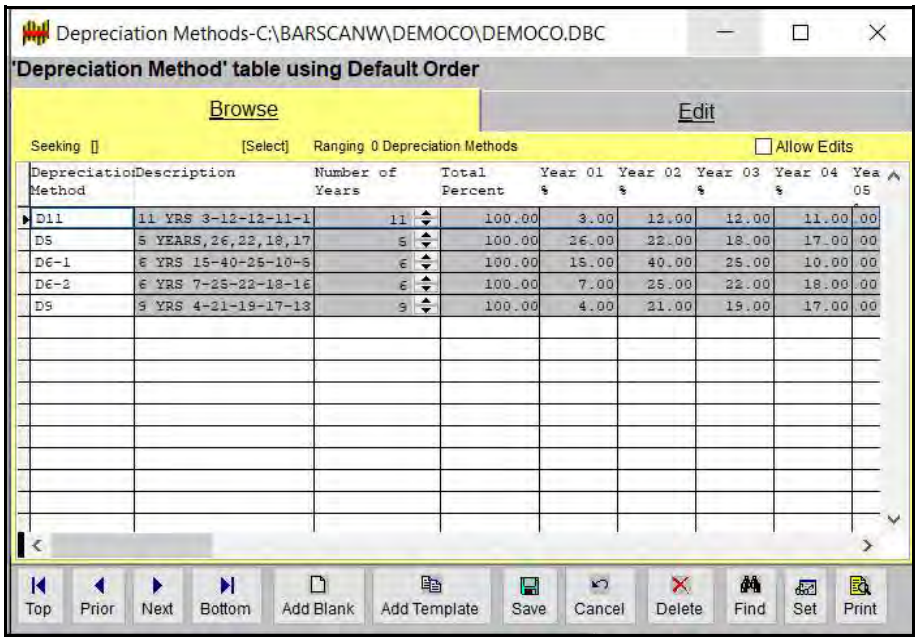
$$\frac{\text{Total Cost minus Salvage Value}}{\text{Depreciable Life}} = \text{depreciation charge}$$

The default Bar|Scan depreciation method is Straight Line. Other methods can be provided to you on a custom basis.

See *a Word About Depreciation* in this section for more information relating to how Bar|Scan ignores the day of the month for depreciation purposes.

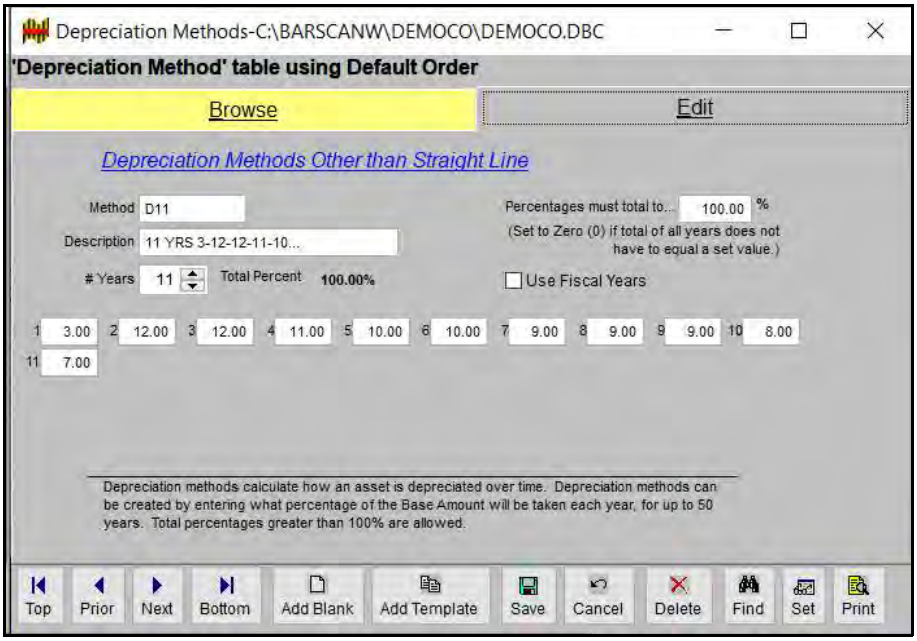
You can, however, use the down arrow, and select a method from the supplied list. If you need to add, change, or delete a method, you may click on the red underline under Method to hyperlink to the Method table.

The Method table is shown below.



The methods that have been entered here are samples. You should discuss the method that will be used at your facility with your accounting department. Then, you may use one of the methods shown here, or use one of these as a template when adding your own method of choice.

The Edit tab is shown below.



This template shows the method, a description of the method, how many years it should cover, an example of how much of a percentage should be calculated for each year, what the percentages should total, and if it should use fiscal years.

Hint: If in your company settings show any month besides January, you should click the checkbox by Use Fiscal Years.

Life (# Periods)

The depreciable life of an asset is theoretically based on its estimated service life. Practically speaking, the actual depreciation life is dictated by financial or reporting requirements such as those required by the government. Five year (60 months) and seven year (72 months) lives are typical for most fixed assets that you will be tracking.

Bar|Scan requires the depreciation life be entered in number of months.

Enter the depreciation life by moving the cursor to the desired item, typing the number of months and pressing TAB.

Period Type

Bar|Scan supports both monthly and the 445 month period type. Monthly is the most widely used period of depreciation. 445 month is sometimes used when it is important to synchronize to a weekly schedule.

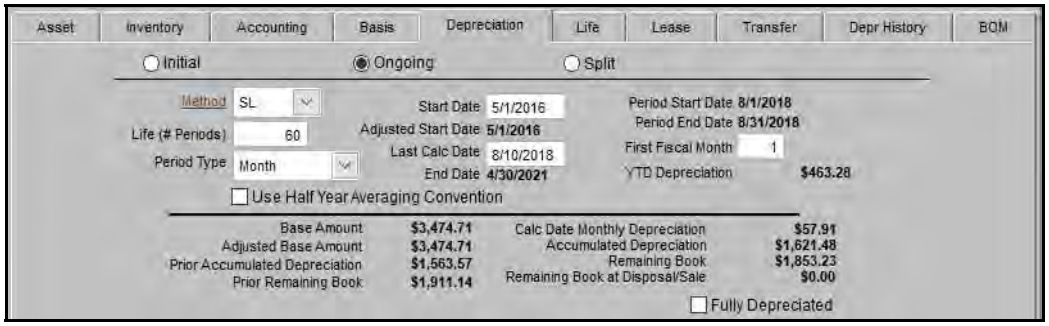
The 445 month period type calculates depreciation only on months where the equipment is being used. To take advantage of this fact, you should add a Status to the Status table equal to ID, IDLE.

When assets are taken out of service, change their Status on the Asset table to ID, IDLE. When the item is placed back into service, change the Status back to IU, IN USE.

Note: If you plan to be able to scan this information into a Mobile Device, remember that you have to add the new Status Code to the Configuration in the Mobile Device, as well by synchronizing with Bar|Scan.

Use Half Year Averaging Convention

No matter when the item is placed in service, the Depreciation Start Date begins the first day of the seventh month of the Fiscal Year.



Start Date

The Depreciation Start Date is the date that you choose to begin the depreciation expense. It does not need to be the same date as the purchase or received date. For simplicity, it is often rounded to the first day of the preceding month.

Whatever method you choose to specify the Depreciation Start Date, it is best to be consistent for all of your assets.

Enter the date by moving the cursor to the desired item, typing the characters and pressing TAB.

See a Word About Depreciation in this section for more information relating to how Bar|Scan ignores the day of the month for depreciation purposes.

Adjusted Start Date

For Straight-Line Depreciation, the Adjusted Start date is the Start Date rolled back to the beginning of the month. For 445 Depreciation, the Adjusted Start Date is rolled back to the closest applicable month.

Depreciation - Last Calculated Date

The Depreciation Last Calculated Date is the date for which you want to calculate depreciation expense. It can be a past or a future date and does not have to coincide with the current date.

It does not need to be the same date as the purchase or received date. For simplicity, it is often rounded to the first day of the preceding month.

The date can be any date that you enter. This means that you can look at historical as well as future dates.

The computer does not update this date. This must be done by you on an as

needed basis. You can update a group or all of your assets by using a "filter" as described in the SET command.

See a Word About Depreciation in this section for more information relating to how Bar|Scan ignores the day of the month for depreciation purposes.

End Date

The Initial Depreciation End Date is the last date that your other system performed its depreciation calculation on your assets. This may or may not be the same date as the date you import your assets into Bar|Scan.

Period Start Date

For Straight-Line Depreciation, the Period Start Date is the same as the Adjusted Start Date. For 445 Depreciation, the Period Start Date is calculated.

Period End Date

For Straight-Line Depreciation, the Period End Date is the same as the End Date. For 445 Depreciation, the Period End Date is calculated.

First Fiscal Month

Assets are usually depreciated on an annual calender or fiscal basis. The calendar basis assumes that the year begins on January 1 and ends on December 31. A fiscal month can be any month in the year. For example, If you choose to make your first fiscal month April, then you would record the number 4 as your First Fiscal Month.

Usually, you would record the First Fiscal Month globally for all assets. This can be done on the Company Screen. See Housekeeping - Company for more information on this.

You may record an alternate first fiscal month here if you have assets that you would like to have a different fiscal month than the majority of your assets.

Fiscal YTD Depreciation

The Fiscal YTD Depreciation, is a calculated item of information. This means that you do not need to enter this number, as it is automatically done for you.

It is a result of other entries made in the Depreciation portion of the data entry screen.

You can specify that the Report Generator print this item in the same manner that

you can specify other items that you have entered.

Base Amount

The Base Amount is a function of two numbers: the total cost and the salvage value.

The Depreciation Base is a calculated item of information. This means that you do not need to enter a number, as it is automatically done for you.

The Depreciation Base is the basis for calculating the depreciation expense.

Adjusted Base Amount, Prior Accumulated Depreciation, Prior Remaining Book Calc Date Monthly Depreciation, Remaining Book

The above items are calculated items of information. This means that you do not need to enter these number, as it is automatically done for you.

They are a result of other entries made in the Depreciation portion of the data entry screen.

You can specify that the Report Generator print this item in the same manner that you can specify other items that you have entered.

Calc Date Monthly Depreciation, Accumulated Depreciation, Remaining Book

The above items are calculated items of information. This means that you do not need to enter these number, as it is automatically done for you.

They are a result of other entries made in the Depreciation portion of the data entry screen.

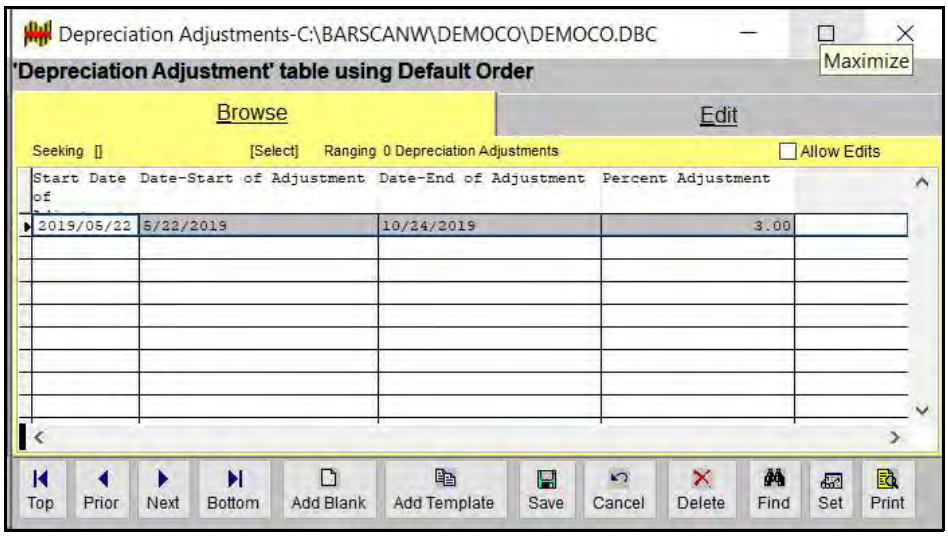
You can specify that the Report Generator print this item in the same manner that you can specify other items that you have entered.

Fully Depreciated

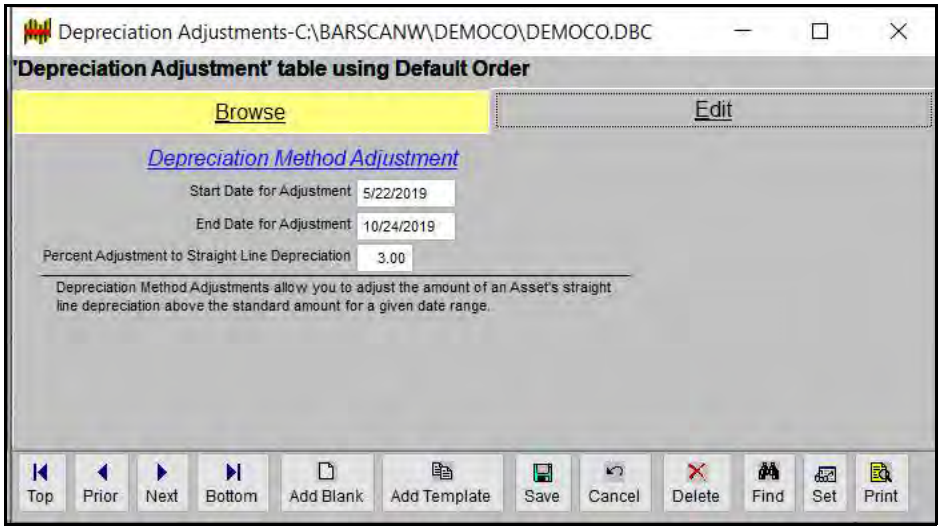
The Fully Depreciated Flag is checked on by Bar|Scan once an asset has been fully depreciated. Its purpose is to supply a simple way of generating or printing a report listing all assets that are or are not fully depreciated.

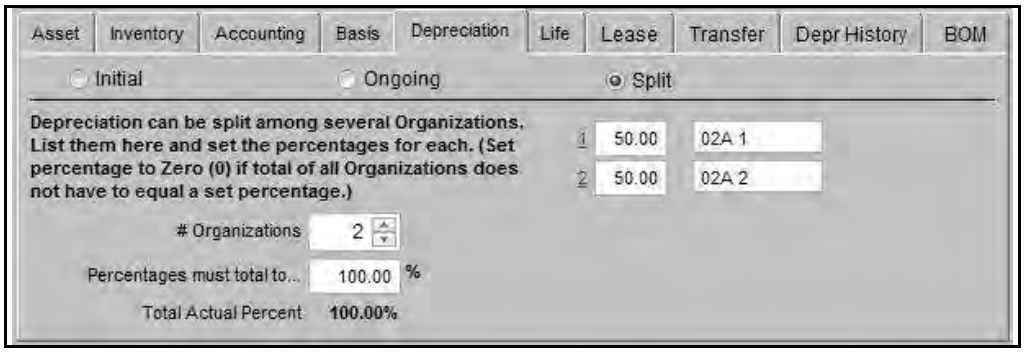
Depreciation Adjustment

Depreciation Method Adjustments allow you to adjust the amount of an Asset's straight line depreciation above the regular depreciation for a given date range. Each of these adjustments can be stored in the Depreciation Methods Table and used in the Depreciation of your Fixed Assets.



The adjustment that has been entered here is a sample. You should discuss the adjustments that may be used at your facility with your accounting department. The Edit tab is shown below.





Depreciation Split

The Depreciation Split feature allows assets your to assign multiple Organizations as “owners” of the asset for depreciation reporting purposes.

While historical depreciation information is not maintained by Organization, the Split information can be used to calculate the percentage of cost allocation to each Organization listed.

Bar|Scan can assign up to five Organizations. A Sample Bar|Scan Asset System Report which shows dollar and percentage allocation totals.

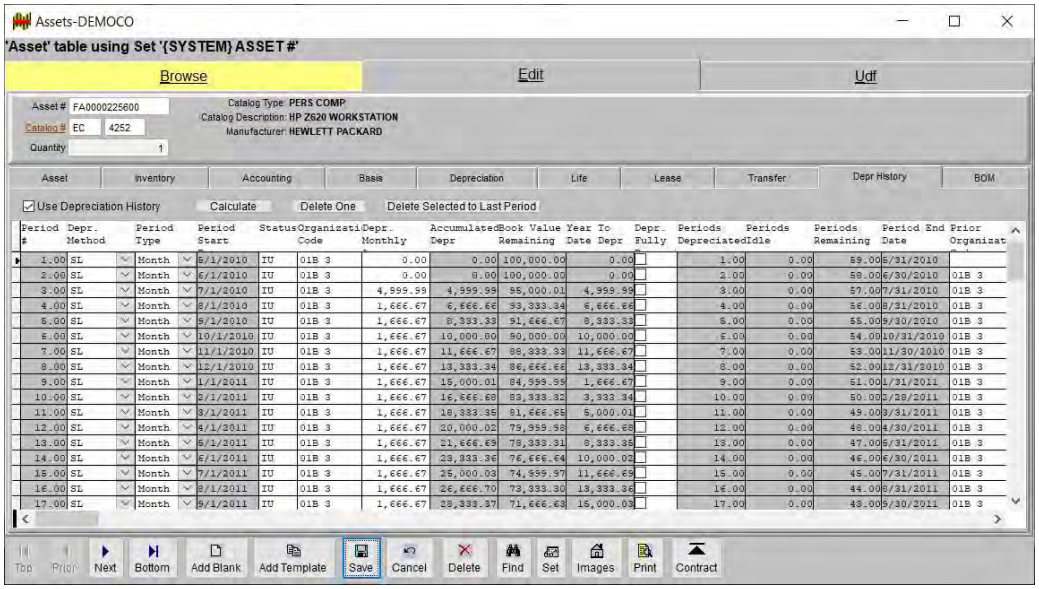
Sample of Manual Adjustments to Bar|Scan depreciation:

Example One: "Catch Up Depreciation". What if asset is placed in service but cost is not available for depreciation data entry until after month closes? For example, you issue a Purchase Order for a server. A server is delivered and installed at the beginning of June. Vendor want to renegotiate price after delivery due to unforseen circumstances. Negotiations take 2 months. You and Vendor agree on $100,000. June books are closed. It is now August.

Asset has a 5 year life (60 months). Monthly depreciation schedule should look like this:

Month 1 (June):	0
Month 2 (July):	0
Month 3 (August):	4,999.99
Month 4-60:	1,666.66

Run Bar|Scan depreciation to get 2 months to post to the General Ledger. Go into Bar|Scan depreciation history and manually set month 1 and 2 to zero. Manually triple current month.



Example Two: Paid 90% of the invoice. Entered these amounts into Bar|Scan and calculated depreciation. Two months later pay an additional 10% (e.g. installation cost). So we want to Bump up 3rd month of life so that the first 3 months average to $30 and spread the final amout over the remainder of the asset's life. For example: $2,700 (original invoice) $3,000 final invoice amount (assume 10 periods).

Monthly depreciation schedule should look like this:

Period 1:	$270
Period 2:	$270
Period 3:	$360
Period 4 to 10:	$300

Entered asset with $2,700 cost, skipped two periods, entered $300 into "Additional Cost" Field. Manually changed "Deprec. Monthly" for that month to $360.00. skipped 10 periods, recalculated.

Period #	Depr. Method	Period Type	Period Start	Status	Organizati Code	Depr. Monthly	Accumulated Depr	Book Value Remaining	Year To Date Depr	Depr. Fully	Periods Depreciated	Periods Idle	Periods Remaining	Period End Date	Prior Organiz
1.00	SL	Month	6/1/2010	IU	01B 3	270.00	270.00	2,730.00	270.00		1.00	0.00	9.00	6/30/2010	
2.00	SL	Month	6/1/2010	IU	01B 3	270.00	540.00	2,460.00	540.00		2.00	0.00	8.00	6/30/2010	01B 3
3.00	SL	Month	7/1/2010	IU	01B 3	360.00	900.00	2,100.00	900.00		3.00	0.00	7.00	7/31/2010	01B 3
4.00	SL	Month	8/1/2010	IU	01B 3	300.00	1,200.00	1,800.00	1,300.00		4.00	0.00	6.00	8/31/2010	01B 3
5.00	SL	Month	9/1/2010	IU	01B 3	300.00	1,500.00	1,500.00	1,500.00		5.00	0.00	5.00	9/30/2010	01B 3
6.00	SL	Month	10/1/2010	IU	01B 3	300.00	1,800.00	1,200.00	1,800.00		6.00	0.00	4.00	10/31/2010	01B 3
7.00	SL	Month	11/1/2010	IU	01B 3	300.00	2,100.00	900.00	2,100.00		7.00	0.00	3.00	11/30/2010	01B 3
8.00	SL	Month	12/1/2010	IU	01B 3	300.00	2,400.00	600.00	2,400.00		8.00	0.00	2.00	12/31/2010	01B 3
9.00	SL	Month	1/1/2011	IU	01B 3	300.00	2,700.00	300.00	300.00		9.00	0.00	1.00	1/31/2011	01B 3
10.00	SL	Month	2/1/2011	IU	01B 3	300.00	3,000.00	0.00	600.00	☑	10.00	0.00	0.00	2/28/2011	01B 3

Example 3:

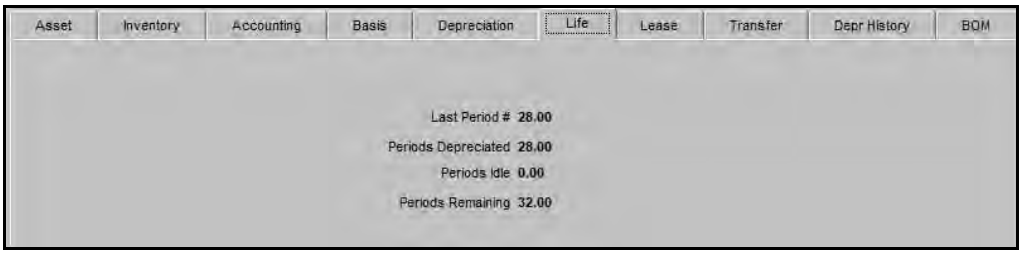
A Bank Branch will be closing prior to it's expected lease termination. The remainder of Leasehold improvements need to be written off on an accelerated schedule. Original depreciation was according to the lease term, say 10 years but now 3 years into the lease, management decides to close this Branch after 5 years. So you take the remainder of depreciation over the next 2 years. The Depreciation Schedule for a $100,000 improvement would look like this:

Year 1 - $10,000
Year 2 - $10,000
Year 3 - $10,000
Year 4 - $35,000
Year 5 - $35,000

Entered asset with $100,000 cost and 120 periods (5 years), skipped three years, and calculated depreciation. As expected, depreciated at $833.33 per month ($10,000 per year). Changed "Life" to 60 periods and advanced periods. Bar|Scan increased depreciation to $2,916.67 per month as expected.

The prior three examples are for demonstration purposes only and are not meant as accounting or tax advise.

THE SIXTH TAB - LIFE



The items on this tab are general information items which are useful for information and reporting purposes. They are adjusted by Bar|Scan every time additional depreciation is taken.

Last Period

The last period number is the last period that depreciation has been taken on an asset.

Periods Depreciated

The periods depreciated is the total number of periods that depreciation has been taken beginning with the start date.

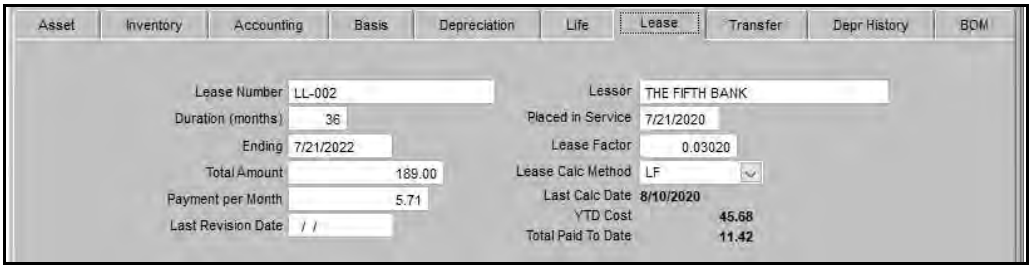
Periods Idle

The periods idle is the number of periods that depreciation was not taken for the asset. Periods idle is normally used only for depreciable assets that depreciate according to the work they do, as opposed to time that has expired. For example, a printing press that has a life of one thousand press runs may not have depreciation taken if it is idle in any particular month.

Periods Remaining

The periods remaining list the number of periods remaining until the asset is fully depreciated.

THE SEVENTH TAB - LEASE



Lease

If your company is leasing assets, you may wish to add this information to Bar|Scan. Leased assets are normally not depreciated, so there is no depreciation information entered. But, there is a Lease table for you to insert any standard lease types. If you fill out the information in the Lease table, and do a Look up Value on the Lease number field, then most of the information on this table will be filled out for you.

It is best to consult your accounting department for proper allocation of this information.

Lease Number

Bar|Scan permits you to enter any alphanumeric Lease Number for the asset or group of assets you are working with. Move the cursor to the desired field. If the lease information that you are filling out is only for this asset, then simply type the information onto this tab. When the entry is complete, press ENTER.

Important: If you have filled out Lease information in the Lease table, then it is imperative that you right click on this field and select Look up Value to fill in the information. In this manner, the rest of the information from the Lease table will fill out the information from this tab. If you simply type the Lease number, even if it is identical, the rest of the information will **not** be filled out for you.

Duration (months)

Most leases have a specific lease duration. Enter any numeric duration in months for the asset or group of assets you are working with.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

Ending

This may be the most important of the lease information you enter. By entering the Lease Ending Date for your leased assets, you can print timely reports showing all leases that will end during the month, quarter, or other time frame.

Total Amount

This information should be the same as the Total Cost from the Basis tab.

Move the cursor to the desired part of the entry and type in the number. When the entry is complete, press ENTER. Or, if you are using a Lease Number from the Lease table, then this information will be filled in for you, using the information from the Total Cost on the Basis tab.

Payment Per Month

Most leases have a specific fixed monthly payment. Enter any numeric value for the asset or group of assets you are working with. This may be useful for future budgeting purposes.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

Last Revision Date

Leases can sometimes be revised during their lease term. If it is important to record when these revisions occur, you may record this date here. This date is optional, and can only be filled out manually.

Lessor

This field is for the company that the asset was leased from. You may place your cursor in the Lessor field and type the information.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

Placed in Service

This item is used to specify when the asset was placed in service, which may differ from the date it was received. You may place your cursor in this field and type the date in, or you may right click and use the calendar to fill in this field.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

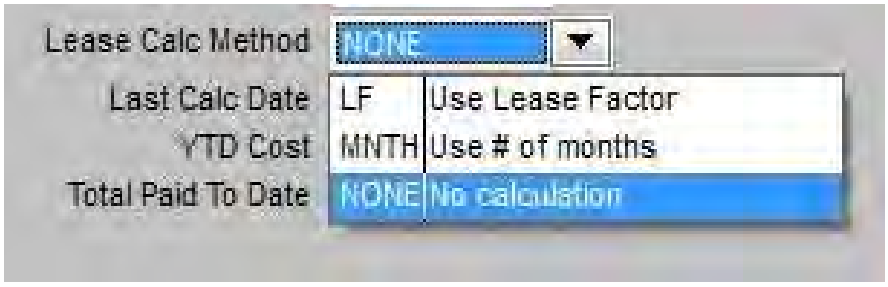
Lease Factor

If your lease has a lease factor, rather than set monthly payments, you should type the percentage into this field.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

Lease Calc Method

The Lease Calc Method field has a down arrow next to it, so that you may select the type of lease factor you wish to use as shown below.



You may select: Use Lease Factor, Use # of Months, or No calculation.

If you filled in this information on the Lease table, when you use the Look up value to select the Lease Number, this information will be filled in for you.

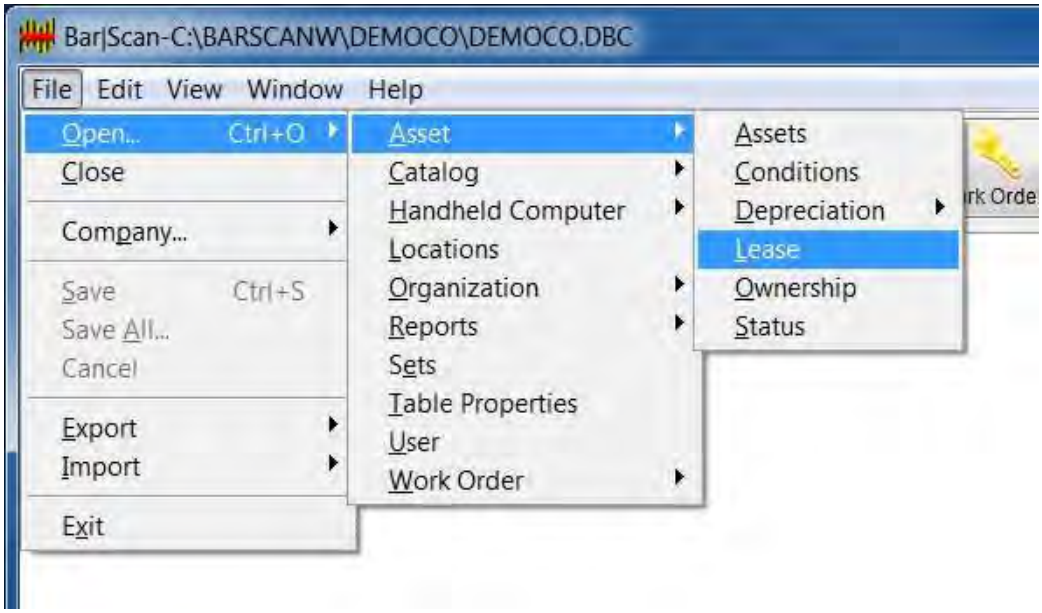
Lease Calc Date, YTD Cost, Total Paid to Date

These items are not available to be filled out, but will display the calculations according to the information that you have entered.

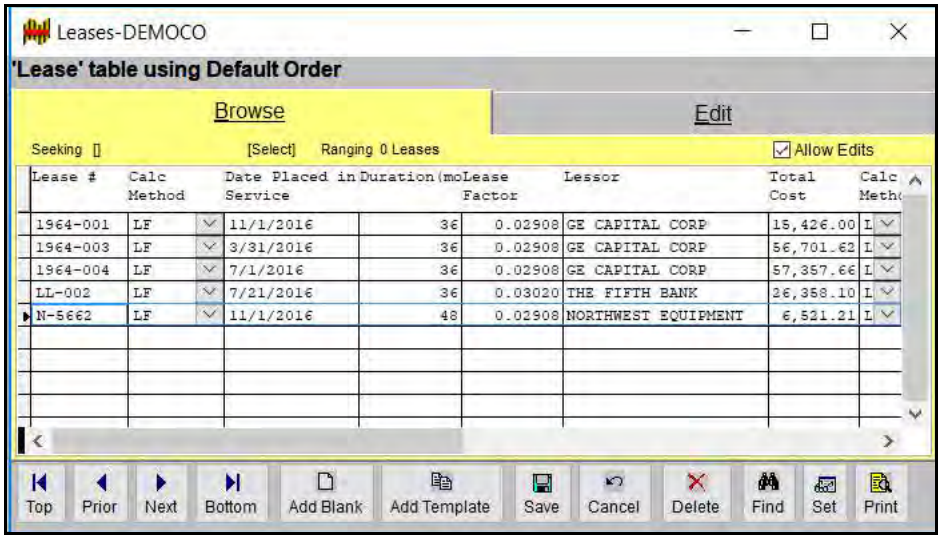
Important: The YTD Cost and the Total Paid to Date fields use the Last Calculation Date that is listed on the Depreciation tab for their calculations.

The Lease Table

From the Main Menu, select File, then Open ...▸, then *Asset* ...▸, then Lease as shown on the following example .

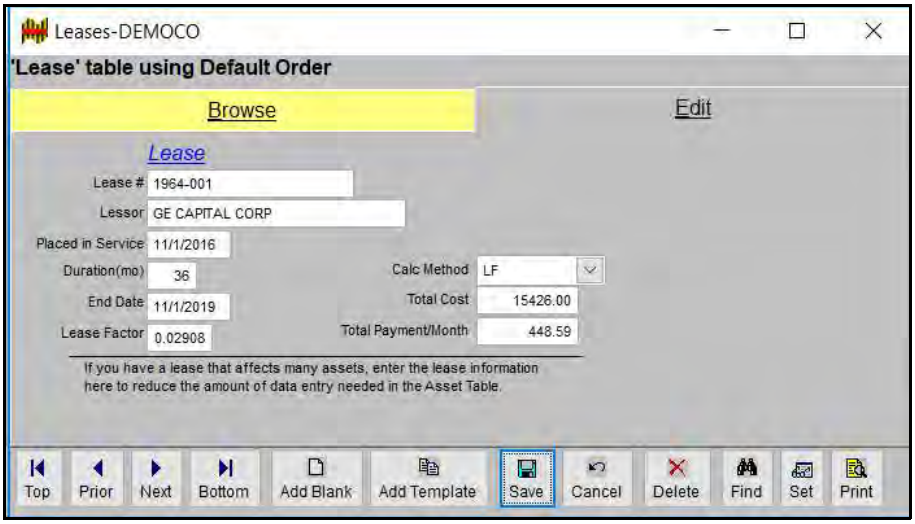


You will be shown the following Lease table.



Your table will not have any data in it until you add data, but for this example we have added data to our table.

When you select the Edit tab, you will see a table similar to the following.



If you have a lease that pertains to many assets, you will probably want to add the information of that lease into this table.

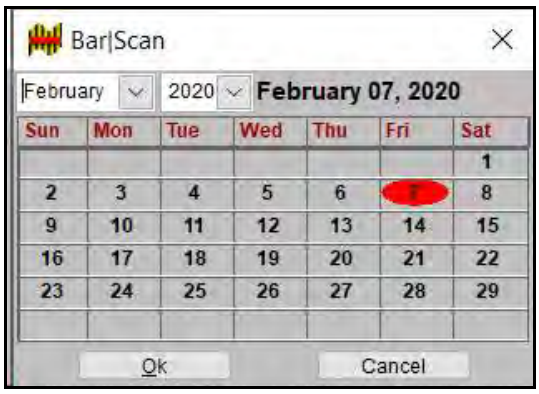
There are fields for: Lease Number, Lessor, (Date) Placed in Service, Duration (months), End Date, Lease Factor, Calc Method, Total Cost, and Total Payment per Month.

The Lease Number and the Lessor should be found on your Lease papers, simply place your cursor in the corresponding field and type. Both of these fields have look up value lists, but these lists have no default values and will appear empty at first and will only reflect your entries after that.

The Placed in Service date may not be the date that you actually receive the piece, but rather the first day that the asset is used.

If you have a lease that is for a given number of set monthly payments, than the number of months that the lease if for should be typed into this field.

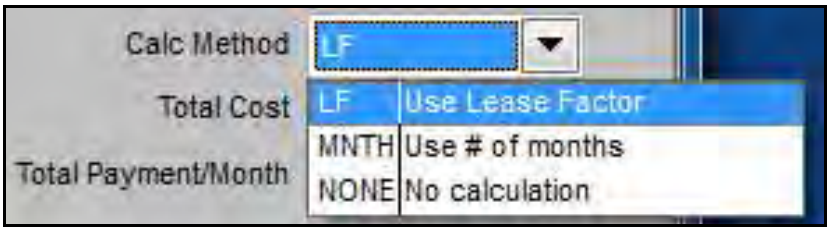
The End Date should be filled in next. The End Date does not have to correspond to the Placed in Service date. If you have a 48 month lease, the end date should be 48 months from the start of the lease. You may place your cursor in the field and type the date, or you may right click and select Look up Value. When you select Look up Value, you will be shown a calendar, similar to the one below.



Select the month by clicking the down arrow next to the Month field. Select the year by clicking the down arrow next to the Year field. Click on the correct day of the month, and then click the OK button. The date field with reflect the date you selected here.

The Lease Factor field appears next. You may not need to fill this field out, depending on the type of lease you have. Your lease payment is calculated using either the Lease Factor or the number of months. Your lease may be for a specific number of set monthly payments and therefore would not need a Lease Factor. Your lease may not have set monthly payments, rather the payments would be calculated using the Total Cost and the Lease Factor.

The next field is the Calc Method field. When you click on the down arrow next to this field, you will be shown a drop down menu similar to the one below.



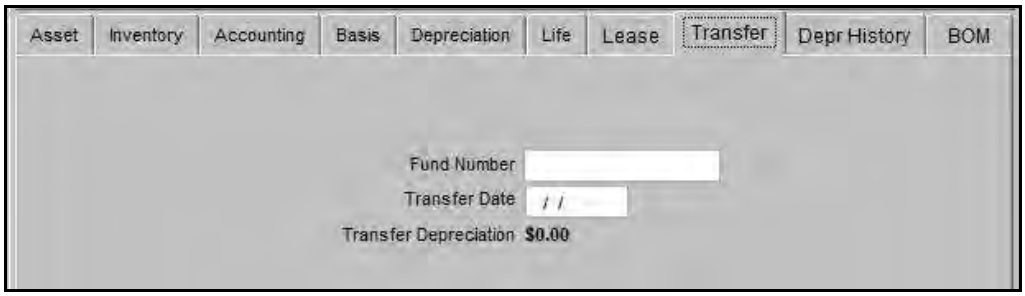
Select the correct response, depending on the type of lease that you have.

Fill in the Total Cost of the assets. You will not be filling out the Total Payment/Month field, rather your lease payment will be calculated for you, according to the other fields you have filled in (provided you have filled out all of the fields required for the calculation).

THE EIGHTH TAB - TRANSFER

Organizational Transfer

When you select the Organization Transfer sub tab, you are presented with the screen shown below.



Fund Number

If the asset transfer requires the account to a particular fund or other reference number, you may enter it here.

Enter the Fund Number by moving the cursor to the desired item, typing the characters and pressing ENTER.

Transfer Date

The Transfer Date is the date that you choose to assign to the organizational transfer of your asset.

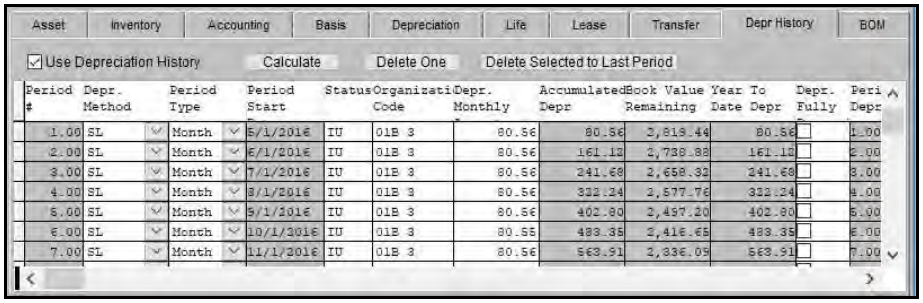
Transfer Depreciation

The Transfer Depreciation amount is the original depreciable value of the asset at the time the asset is transferred from one organization to another.

The *Depreciation Base* amount is automatically inserted into Transfer Depreciation when you enter a valid date into the *Transfer Date*.

The Transfer Depreciation amount is not changed if the Depreciation Base amount is changed subsequent to the transfer.

THE NINTH TAB - DEPRECIATION HISTORY



Bar|Scan supports the creation and maintenance of complete depreciation history "buckets" for all of your assets. This tab allows you to turn this extended feature on. Unless you require the detailed period by period history, it is not necessary to turn this feature on since it does require additional disk space and computer time to keep track of the additional information.

You can turn this feature on later and Bar|Scan will generate all prior periods for you. Therefore, the calculations will be the same whether or not you use Depreciation History initially or at a later date.

There are many columns of information displayed on this tab. You can move these columns so that they are arranged in any order that best suits your requirements. Once these columns are moved, their placement is retained until you choose to move them again. Since there are more columns than can normally be seen on most PC screens, it is best to arrange them so that the most commonly used columns appear towards the left. Feel free to navigate to the right side to examine all of the columns.

Use Depreciation History

Check this button on if you which to begin using the depreciation history feature. Bar|Scan will create an initial list of periods based on the depreciation information. The list will be for only the specific asset or assets selected or selected in your range. If you wish to use depreciation history for all of your assets, you will need to range them first.

Calculate

Press the Calculate button after you have selected Depreciation History to allow Bar|Scan to calculate the initial depreciation. You will also need to press Calculate after inserting or removing a period.

Delete One

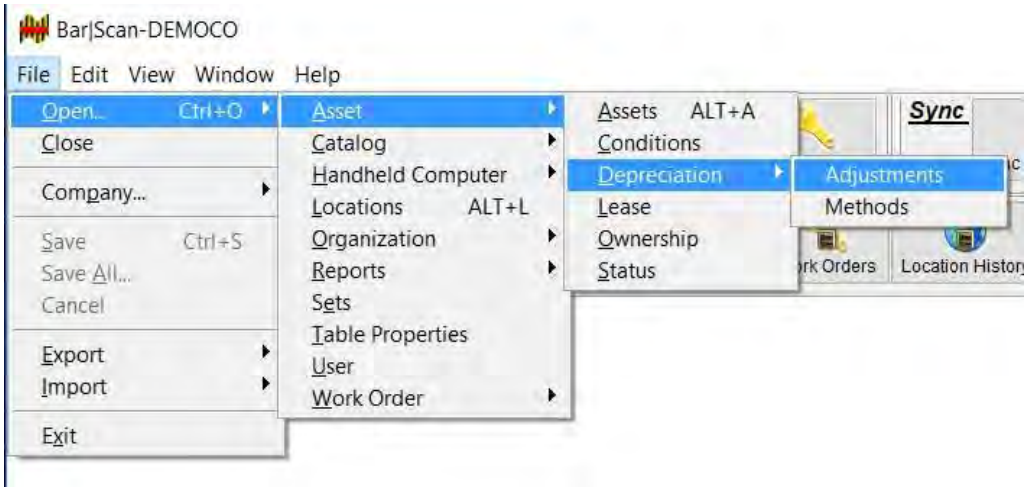
Press the Delete One button to remove a period.

Delete Selected to Last Period

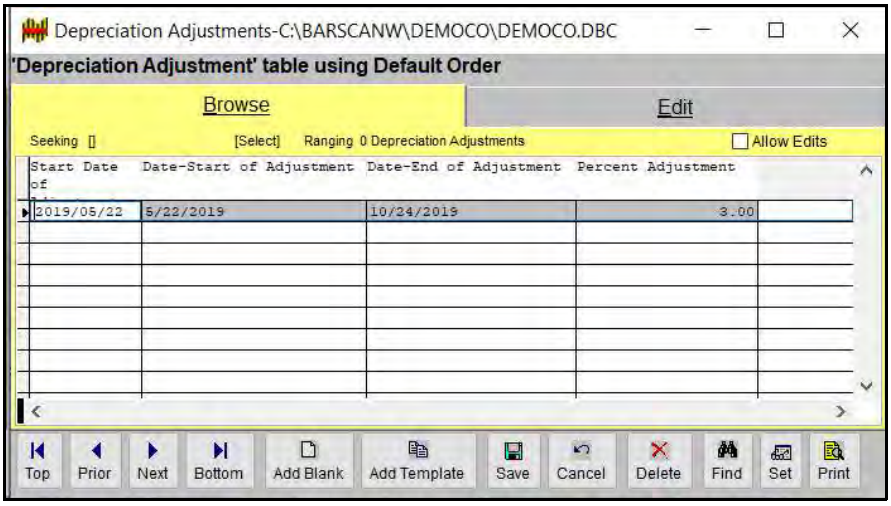
Press the Delete Selected to Last Period button to remove all periods newer than the period that you have indicated by your cursor position. Remember that any assets in the range will be affected.

The Depreciation Tables

There are two tables that hold depreciation information. Both of these tables can be accessed from the Main Menu by selecting select File, then Open ...▸, then *Asset* ...▸, then Depreciation ...▸, then Adjustments or Methods.



When you select the first table, Adjustments, you will be shown a table similar to the one below.



From the Browse tab that is shown above you may select an item to change, or add a blank or a template item, and then select the Edit tab.

There are three fields listed on this tab: a Start Date for the Adjustment, an End Date for the Adjustment, and the Percent of Adjustment to Straight Line Depreciation.

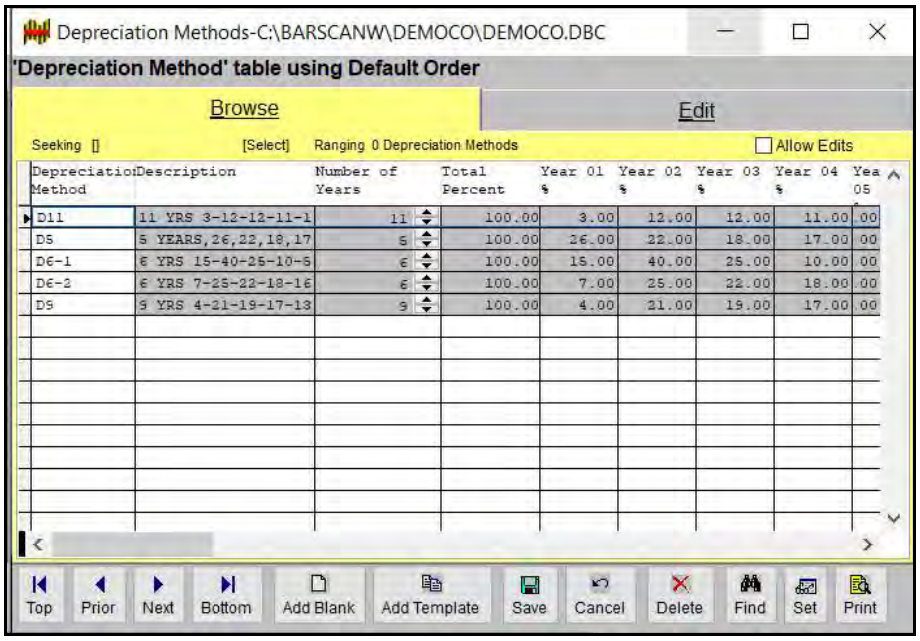
This table is used, not for depreciation, but to get a new figure above straight line depreciation for replacement costs.

As your items get older, you may want to set up a fund in order to replace them by their maturity date. Rather than estimating a replacement cost, you could use an actual percentage that the cost of replacement may appreciate during the life of your asset. So, to purchase a replacement by the end of an assets life, you may want to figure the Straight Line plus, for instance, 3%.

Using this table, you could have the system calculate the percentage above the Straight Line depreciation amount, for the dates given.

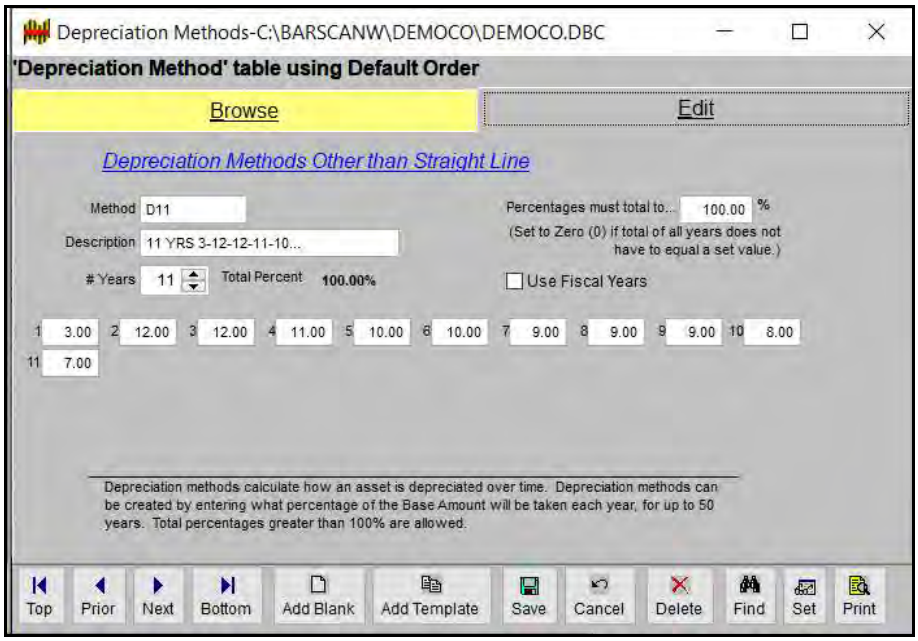
You could then add this amount to your replacement fund, rather than estimating how much you should add.

The second depreciation table listed under Assets is the Depreciation Methods table, which is shown below.



Select one of the Methods listed on the Browse Panel to change, or use as a template for adding a new method. Then, select the Edit tab.

When you select the Edit tab, you will be shown a panel similar to the one below.



On this table you may change the method you have selected, or add one of your own.

Note: The items that we entered listed in the Democo, are for demonstration purposes, and will not appear in your own Company unless you add them

You enter the Method, and a description of that method, and how many years that the method should cover. You enter how much of a percentage should be used for each year, and what percentage your yearly percentages should total. For instance, above we listed the percentage for the yearly total to be 100%. But, not all depreciation schedules will equal 100%, some totals may be more, and some may be less.

If your total of yearly depreciations should equal 120%, and cover ten years, make sure that when you add all of the percentages for each of the ten years that it equals 120%. For this is a table driven depreciation method, and it will follow the percentages you lay out here. Once you have entered and saved the information on this table, your method will appear as an option for the depreciation method on the Asset table.

A Word About Depreciation

Basically a method of cost allocation, depreciation can be a complex issue and is used for many different purposes.

Bar|Scan can provide you with *simple* methods of handling depreciation expense. This is often adequate for issues such as charge-back to your departments, or budget analysis.

If you are working with a collection of assets that are similar in nature, you are using a group system of depreciation. If you are working with a collection of assets that are dissimilar in nature, you are using what is typically referred to as a composite system of depreciation.

Important: Bar|Scan is not capable of providing you with all of the features required for tax reporting purposes.

Depreciation Calculations

Unless you enter a new depreciation method into the Bar|Scan depreciation Method table, the depreciation from a given *Start Date* to a given *Last Calc Date* is calculated in one of two ways depending on the calculation method specified on Page Two of the Asset Display Screen:

'SL' = Straight Line Depreciation
'SLPPI'=Straight Line Depreciation + PPI depreciation adjustment.

Depreciation is calculated for both methods by first calculating the *Accumulated Depreciation* from the *Start Date* to the *Last Calc Date*.

Straight Line Accumulated Depreciation Amount

The straight line Accumulated Depreciation amount is calculated as follows where:

Base =Purchase Cost + Tax + Installation + Freight + Additional - Salvage Value

Number of Periods = (*Last Calc Date* Year * 12) + (Month # of *Last Calc Date*) - (*Start Date* Year * 12) - (Month # of *Start Date*) + 1

The month numbers are as follows:

January = 1
February = 2
etc. . . .
December = 12

Total # of Periods = *Life* (in months)

Beginning and Ending of Periods

Note that this calculation is performed with one period equaling one month, the maximum Number of Periods allowed is the *Life* of the asset, and therefore the maximum Accumulated Depreciation will equal the *Base*. Any *Last Calc Date* specifying a month past the last month of the life of the Asset will still have the maximum *Accumulated Depreciation* equal to the *Base*, as it will have been fully depreciated. Since depreciation is calculated based on a period of one month, the day of the month of both the Start Date and the Last Calc date do not matter, as it is the Month of the dates that are used in the calculations. For example, the following date ranges yield the number of periods specified below.

Start Date	*Last Calc Date*	Number of Periods (Months)
01/01/2019	01/31/2019	1
01/31/2019	02/01/2019	2
01/15/2019	12/31/2019	12
01/01/2019	12/01/2019	12
01/05/2020	01/01/2021	13
01/16/2019	06/01/2019	6

PPI Accumulated Depreciation Amount

PPI accumulated depreciation calculations at first appear more complicated but actually follows the same general principals used in calculating the straight line amounts. The PPI Accumulated Depreciation Amount is calculated from the *Start Date* to the *Last Calc Date* just like the straight line calculations. However, how much is accumulated over that date range is determined by performing a table lookup into the Depreciation Adjustments table. This table presently contains three columns:

Start Date for Adjustment
End Date for Adjustment
Percent Adjustment to Straight Line Depreciation (PPI% per year)

An unlimited number of adjustments may be entered. The Accumulated PPI amount is just the sum of all of the individual PPI amounts over the *Start Date/Last Calc Date* range and is calculated as follows:

For each entry in the table whose date range wholly or partially overlaps the range specified from the *Start Date* to the *Last Calc Date*, obtain the individual PPI amount by performing the following calculations:

1. Calculate # of periods the two ranges overlap (in months).
2. Calculate the PPI Depreciation Amount for the overlap:

   PPI Amt = # periods overlapped * (PPI% per year/12) * *Base*

(The PPI% per year is divided by twelve to obtain the percentage applied to each monthly period.)

Repeat this for each entry in the table as stated above, accumulating individual PPI Amounts into an Accumulated PPI Amount.

The Accumulated PPI amount is added to the Straight Line PPI amount to obtain the Accumulated Depreciation displayed on the Bar|Scan Asset screen.

Other Derived Values

Other values are derived as listed below. If the method is 'SL' (straight line), the Accumulated Depreciation is derived from the straight line calculation listed above. If the method is 'SLPPI' (straight line with PPI adjustment), the Accumulated Depreciation is derived by summing the straight line and the PPI adjustments as specified above.

Monthly Depreciation = *Accum Deprec*/Number of Periods
(See SL calc description above for description of Number of Periods)

Remaining Book = *Base* - *Accum Deprec*
(for SLPPI calculations, this can be a negative number.)

YTD Depreciation = Amount Depreciated in the Year of the Last Calc Date.

The YTD Depreciation is the accumulated depreciation in the year of the Last Calc Date, starting from January to the month of the Last Calc Date itself (e.g., if the Last Calc Date were 4/3/20 then the YTD Depreciation would be calculated over a period of 4 months from January (1/20) through April (4/20)).

It is calculated based on the number of months that the life span of the asset overlaps the YTD date range from January to the Last Calc Date. For straight line calculations, this is:

YTD Depreciation = (# Months overlap) * *Base* / *Life*

For 'SLPPI' calculations, the straight line amount is calculated first and then the PPI Amount is added to it. The Depreciation Adjustments table is again consulted to obtain the PPI Amount and calculations are performed using the same method detailed above(under PPI Accumulated Depreciation Amount), but the starting date is January 1st of the same year as the *Last Calc Date* and the final date is the *Last Calc Date* itself.

The YTD Depreciation will have a non-zero value only if the *Last Calc Date* is within or before the last year of the life of the asset and the *Last Calc Date*'s month is equal to or after the month of the *Start Date*.

Special Depreciation Problems

Several special problems develop in accounting for matters related to depreciation. We have listed two that you should be aware of since they are outside of Bar|Scan's capability.

✓ **Partial Periods** - depreciation is normally computed on the basis of the nearest whole month. Bar|Scan allows exact dates to be entered for the convenience of the user. However, only the month and year are used to calculate depreciation. To the computer, the date "12/31/19" will give the same depreciation result as the date "12/01/19" since they are **both** December of 2019.

Bar|Scan calculates the depreciation expense for whole month periods only. It does not matter if the date is the beginning, the end, or any day in the month.

✓ **Revision in Depreciation Rates** - typically, changes in depreciation rates do not affect previously reported results. Unfortunately, in order to accomplish this, Bar|Scan would have to maintain an enormous amount of historical accounting information on every asset.

Bar|Scan will not remember previously entered information once it has been changed.

If the type of information that we just discussed is critical for you, we suggest that you utilize software especially designed for fixed asset accounting. If your accounting department already has such a system, and you are using Bar|Scan for charge back purposes, keeping old depreciation expense should not be of concern to you. In any case it is best to review all of the issue relating to using Bar|Scan's depreciation capabilities with your accounting department.

Depreciation - Base

The Depreciation Base is a function of two numbers: the total cost and the salvage value.

The Depreciation Base is a calculated item of information. This means that you do not need to enter a number, as it is automatically done for you.

The Depreciation Base is the basis for calculating the depreciation expense.

Depreciation - Life

The depreciable life of an asset is theoretically based on its estimated service life. Practically speaking, the actual depreciation life is dictated by financial or reporting requirements such as those required by the government. Five year (60 months) and seven year (72 months) lives are typical for most fixed assets that you will be tracking.

Bar|Scan requires the depreciation life be entered in number of months.

Enter the depreciation life by moving the cursor to the desired item, typing the number of months and pressing TAB.

Depreciation - Monthly, Remaining, Accumulated, Year to Date

The monthly depreciation, remaining value, accumulated depreciation and year-to-date depreciation are *calculated items* of information. This means that you do not need to enter these numbers, as they are automatically done for you.

They are the result of all of the other entries made in the Depreciation portion of the data entry screen.

You can specify that the *Report Generator* print these items in the same manner that you can specify other items that you have entered.

A Special Note about Asset Depreciation and Disposal

An Asset's disposal date does affect depreciation. The disposal date does affect depreciation as follows:

If a disposal date is entered, depreciation is calculated only up through the month of disposal, inclusive. Depreciation no longer accumulates for any month after that (i.e. the monthly depreciation for all months after that is zero) and the Disposal Gain (or Loss) is calculated as the Sales Amount minus the Remaining Book value.

If you are using Depreciation History this means the following:

1. When a depreciation calculation is performed (i.e., a new Last Calc Date is entered) the Depreciation History will always eventually contain the full number of periods up to the Last Calc Date or the Life of the item whichever comes first. (e.g. If an item has a life of 36 months then as the Last Calc Date progresses in time it will eventually contain 36 entries in the Depreciation History.)

2. If no Disposal Date is entered for the item, as a new Last Calc Date is entered each month, a new Depreciation History entry is generated that has the full Monthly Depreciation amount for that month.

3. Any depreciation period dated after the month of the Disposal Date will have a monthly depreciation amount of zero (0.00) when it is generated.

4. If a Disposal Date is entered after Monthly Depreciations have already been generated, then all Monthly Depreciation Amounts after the month of the Disposal Date are forced to Zero (0.00) when the Asset is saved.

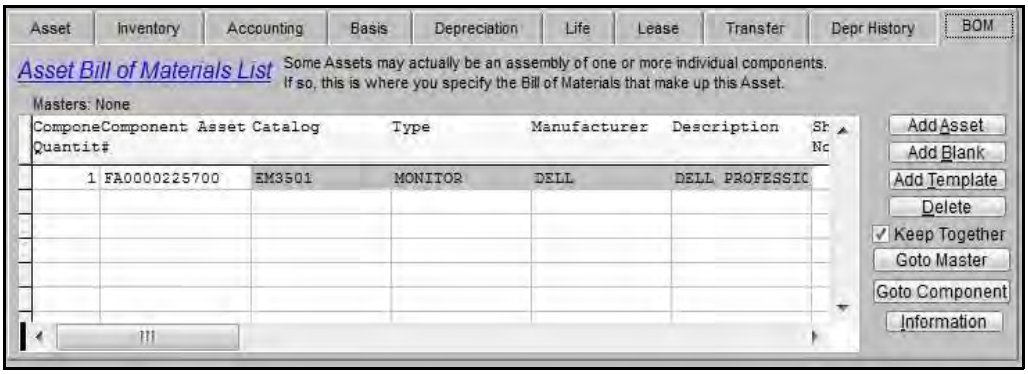
For example, assume you have a $3,600 item with a life of 36 months as of 1/1/2021 with calculated deprecation through 12/1/21 of $1,200. You will have 12 entries in the Depreciation History, each with $100. If a Disposal Date of 6/1/21 is entered, all entries from 7/1/21 through 12/1/21 will have their Monthly Depreciation changed from $100 to $0. Total Depreciation will change from $1,200 to $600.

However, the reverse is not true. If you readjust the Disposal Date a second time so that the new Disposal Date is AFTER the original one, then any Monthly Depreciations between them are not recalculated, they remain at zero (0). The intervening months must either be manually re-entered or Monthly Depreciations reset by un-checking then re-checking the "Use Depreciation History" check box for that asset.

5. Since the item has been disposed of before being fully depreciated the 'Fully Depreciated' check box is not set and remains unchecked (i.e. set to No), both in the Asset screen and in the Depreciation History.

THE TENTH TAB - ASSET BILL OF MATERIAL LIST

When you select the BOM sub tab, you are presented with the screen shown below.



Bar|Scan has a set of features are available to allow you to create, modify and move groups of assets by selecting them using both a Catalog Component List or an Asset Bill of Materials (BOM) List.

With these new features, you can move these groups as a whole, perform work on these groups by means of a Work Order, reserve the components of these groups by means of a Reserved Bill Of Material so that they will not be available for use to build other groups or be moved to other locations.

You can also create Bar|Scan reports detailing these special catalogs, assets, and components and their relationship.

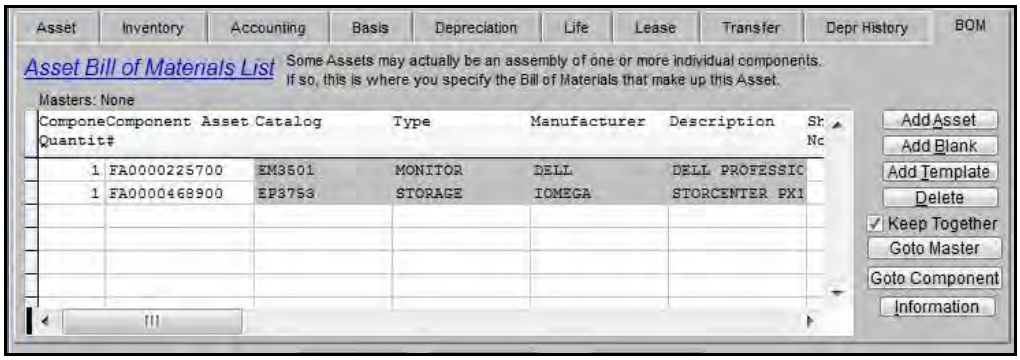
Asset Components can be traditional assets (each labeled with a unique asset number) with a quantity assigned or Quantity items that we refer to as 'Z' number.

You can also have a mix of Assets and Quantity items in your Asset Component list. For example, a Server can have a UPS and several circuit cards that are being tracked but not individually labeled.

Furthermore, an Asset Component List can have several similar but different types of items linked together. For example, a Computer Workstation may have a Desktop and 2 monitors of the same type (same Catalog) or different kinds of monitors (different Catalogs).

The difference between Catalog and Asset Components is that Asset Components refer to specific tagged assets or Quantity items.

Below is an example of linking specific tagged assets.



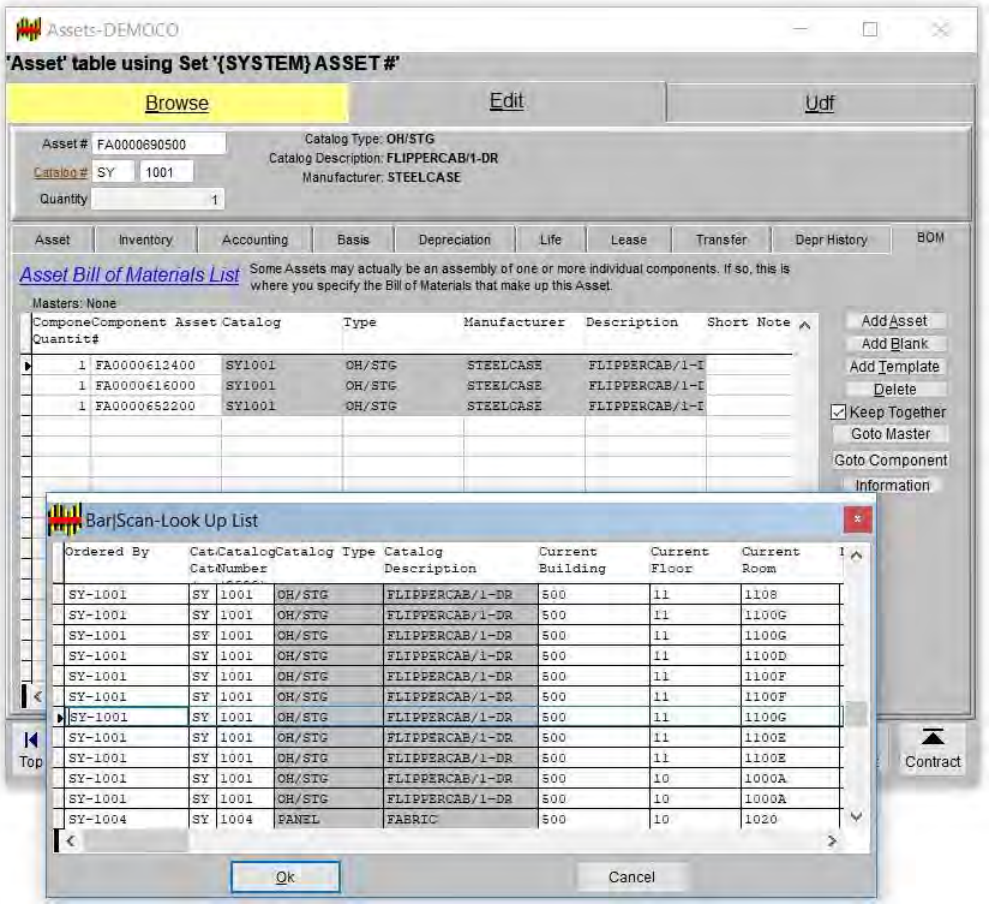
Let us look at how this Asset Component List used. It can be used in different ways.

First, scanning the primary asset will update all items' Current Location to the same. In effect, moving one item to a new location moves them all as a group.

Second, the Asset Component List is used in the Bar|Scan Work Order Module. If you are preparing Work Orders, the Asset Component List is a method of combining Assets for the Work Order process. This is discussed in more detail in the Work Order Chapter.

Third, an Asset Component List can provide a more intelligent database resulting in more useful reports for planning or other purposes.

Finally, when making an Asset Component List, it can use the Catalog Component List. See the example below. It is discussed on the next page.



In the example shown above, the primary Asset is a Workstation (Catalog SY0001). In the Bar|Scan Catalog Table, SY0001 has three Catalogs entered as Catalog Components. This particular example was previously used in the Catalog Components section. The three Catalog Components were SY1001, SY1004 and SY4104.

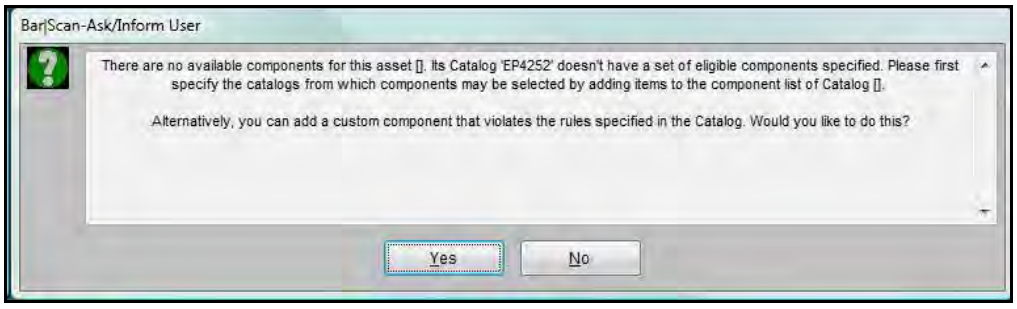
If you look carefully at the example on the previous page, the Look Up list is filtered by these three Catalogs. In other words, only Assets that have one of these three Catalogs are displayed.

Bar|Scan will not force you to add exactly the same Quantity of Components into the Asset Bill of Materials as there can be exceptions to the list, e.g. a corner Workstations versus a center Workstation.

In cases where you need to further customize the Bill of Materials, you can also add assets that are not filtered, however, these can only be entered by using the 'Add Blank' button.

Add Asset Issues

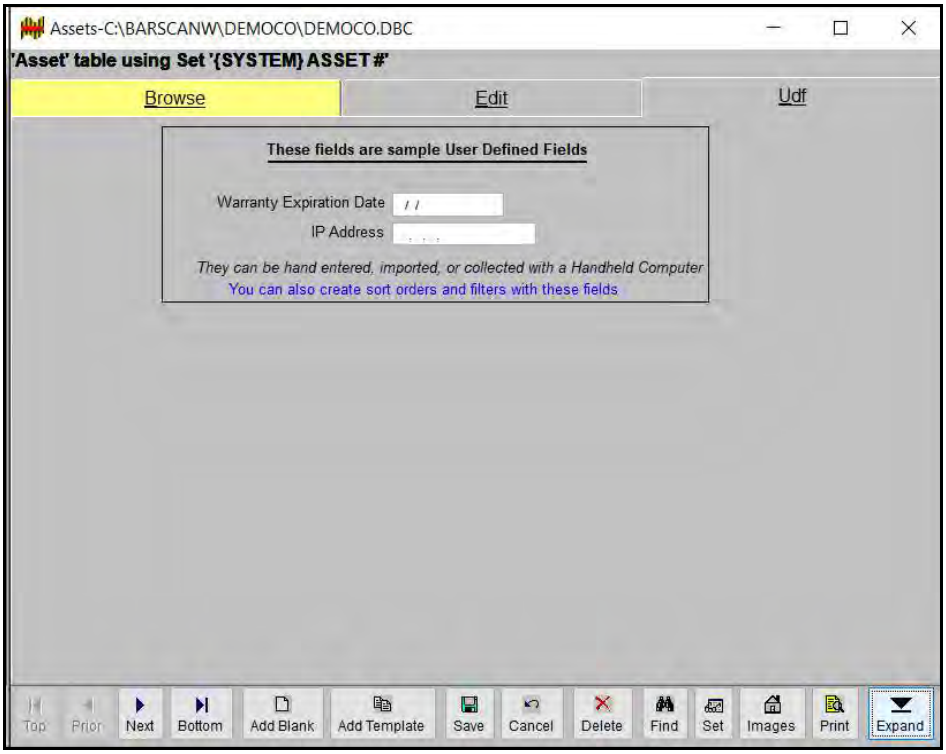
If you attempt to add an asset where the Catalog Number is not already in the Catalog Tables Component List, you may do so, but you will first be shown the message below.



This is to make you aware that the Bill of Material List is not one that is defined in the Catalog Table. For example, a particular Computer Server may have a specific list of Component Cards. You might want to add a Component Card that is not standard but the Server can accept it. In this case select YES to continue to enter the Asset.

USER DEFINABLE FIELDS TAB

This tab is available for all of the users who have purchased the User Definable Fields (UDF) module. A sample UDF tab is displayed below, however the information on your tab may appear different.



The tab will not appear, even if it you have the UDF module, until the first UDF is added to your Asset Table. You can access this feature, by going to the Main Menu, select Panel, and then select Design Mode-User Defined Fields.

Your screen will be customized to meet your requirements. The User Definable Fields Module allows you to create a variety of different fields. These fields are fully utilized by the report feature and can be ordered, filtered, and printed.

You can optionally populate these fields with the Mobile Device. Please see User Definable Fields, Chapter 16, in this User Manual for more information.

Find Problems

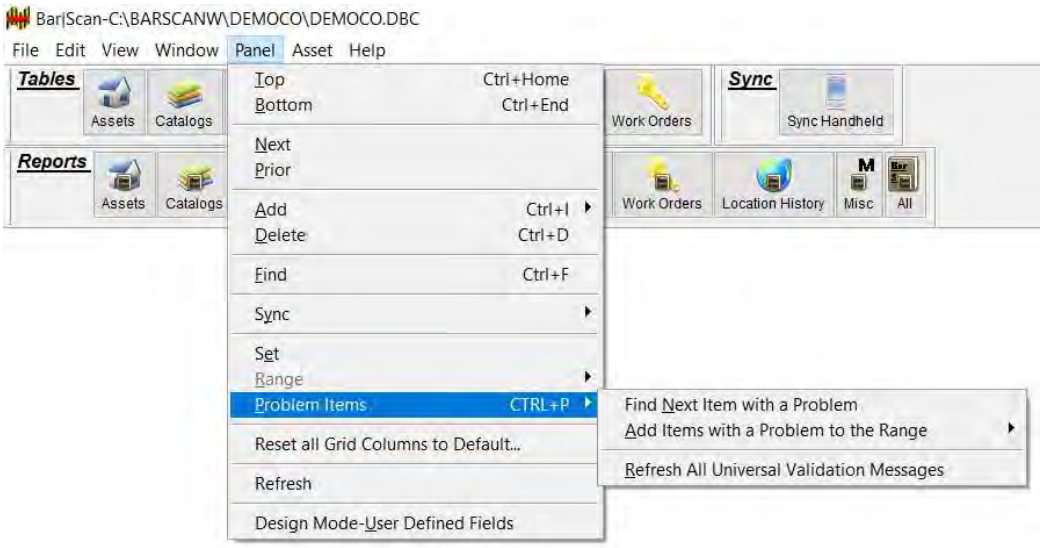
You can encounter unknown problems in any of your tables. This may be due to an import, or a change that you made in your validation rules which would affect change that was made since the information was originally saved or a computer problem like a database index that may have become corrupted because of an inadvertent computer shutdown.

Using the Advanced Validation Feature, you can create a new validation rule. For example, you can create a validation rule that adding an asset requires that the PO format matches a format based on the Department that orders it. While this is acceptable, what about all of the assets that were added before you created this rule? These would be identified by using the Find Problems command.

Here is another example. If you had an index problem, the database could encounter a time when it could not find the Location listed on the asset, when in fact it existed in the Location table. While this location problem would not occur in a database that is functioning properly, it can happen if there is an index problem.

Normally, you would not know about this problem until you went to move a Transaction for that same asset number. If you suspect you may have problems, or you simply want to make sure you do not, you can use the Find Problem feature to look for problems in the table you have open.

From the Main Menu, select Panel, then Problem Items as shown on the following example.



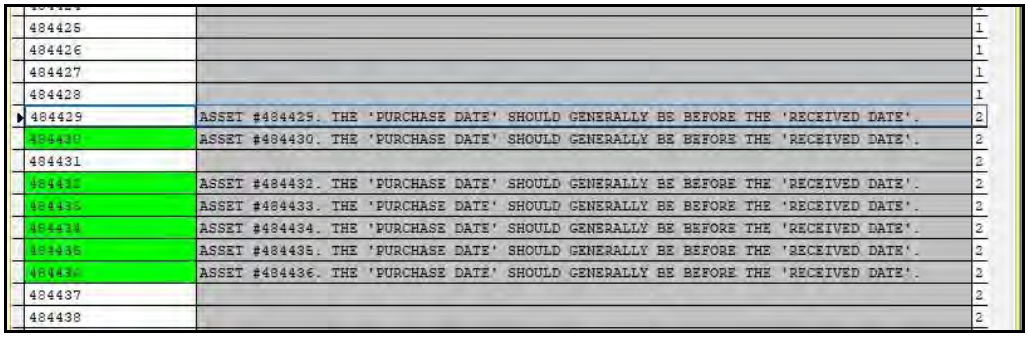
Find Next Item with a Problem

Now select Find Next Item with a Problem. When you select this feature, the process will begin immediately. You may check any table that you have open. The items that the system will check for will obviously vary depending on which table is open. But, each item is always checked as though it is a newly entered.

Add Items with a Problem to the Range

You may want to work on many assets that contain the same problem. Using the Range Feature will accomplish this. There are two choice 'Starting with Current item' and 'From the Top'.

You may also note that the problem detail can be displayed on the Browse screen. Using the SET Feature, select the table 'Universal Validation Rules' and then the column 'Message'. An example is shown below.



484425		1
484426		1
484427		1
484428		1
484429	ASSET #484429. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484430	ASSET #484430. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484431		2
484432	ASSET #484432. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484433	ASSET #484433. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484434	ASSET #484434. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484435	ASSET #484435. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484436	ASSET #484436. THE 'PURCHASE DATE' SHOULD GENERALLY BE BEFORE THE 'RECEIVED DATE'.	2
484437		2
484438		2

Refresh all Universal Validation Messages

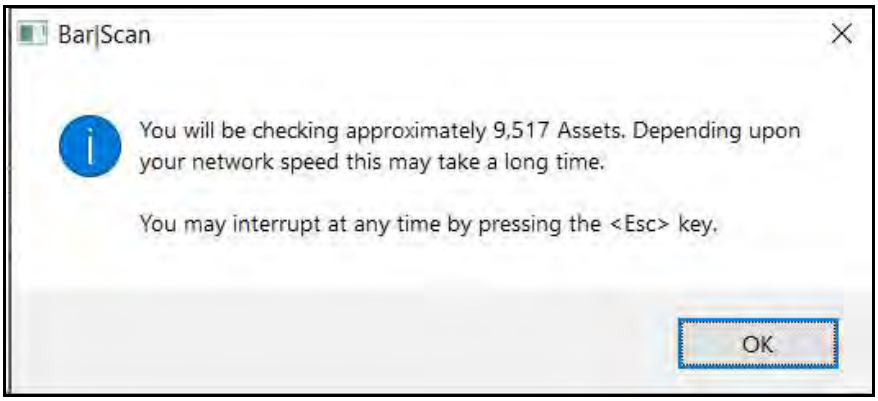
This menu option rebuilds the set of validation messages for the table that you are currently editing using the currently existing validation rules, both those built into Bar|Scan and those specified by the user in the Universal Validation Rules table. It is recommended that this option be run for any given table under the following circumstances.

1.) When you receive a program update to your current version of Bar|Scan.

2.) You have added, deleted or changed any of the Universal Validation Rules for the given table. For example, if you added a new Universal Validation Rule that required that the Asset table 'Purchase Date' to be filled in, you would not immediately know which assets violated this rule. Running the 'Refresh All Universal Validation Messages' menu item would rebuild the Message table, now including the results of applying the new rule.

3.) You notice that currently existing items violate current Bar|Scan validation rules. Running this menu item will put all of the validation violations into the Universal Validation Message table so that they may be listed and considered using reports, FIND, or the SET feature.

Please note that currently this is an interactive command that must be performed individually for each company and table of interest. It may also take some time for larger databases. You will be presented with a warning message similar to the one below.



CATALOGS

INTRODUCTION

The Catalog table is used to make a set of uniform descriptions for all of your assets in the Bar|Scan system. This feature permits you to assign a unique catalog number and enter information about a particular type or group of assets.

You will want to establish and use some guidelines concerning the catalog entries before you start to enter items into the Bar|Scan Catalog. You should define, at a minimum, how you will assign numbers to different types of assets, and what additional attributes you wish to record for each different asset Category.

The Catalog begins with a Category and a Number. Bar|Scan provides you with a list of two-character Categories from which to choose. The four-digit number is assigned by you and can be assigned consecutively, or you can devise a numbering system which is meaningful to you.

The format of the Catalog (two-character Category and a four-digit Number) can be modified using the User Defined Fields Module. This is not recommended unless for a specific purpose such as interfacing with a Legacy system.

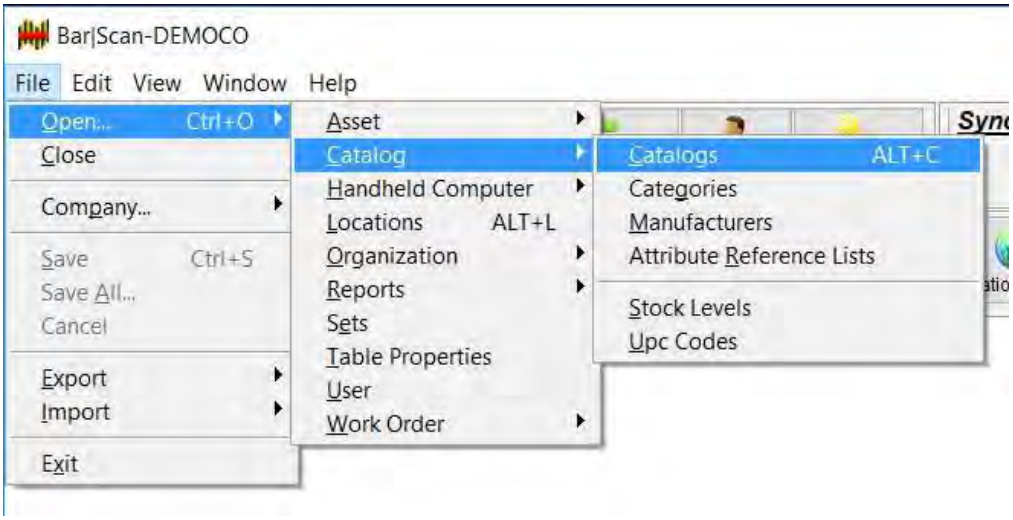
The Catalog table also provides a separate place to record information about the different Manufacturers, Attributes, and Categories.

Bar|Scan also provides **Catalog Development Guidelines** to assist you in your Catalog creation process. They are located at the end of this chapter.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

When you want to view, change, add, or delete catalogs you will need to open the Catalog table. From the Bar|Scan Main Menu, select File, then Open . . . ▸, then Catalog . . . ▸, then Catalogs as shown on the following example.

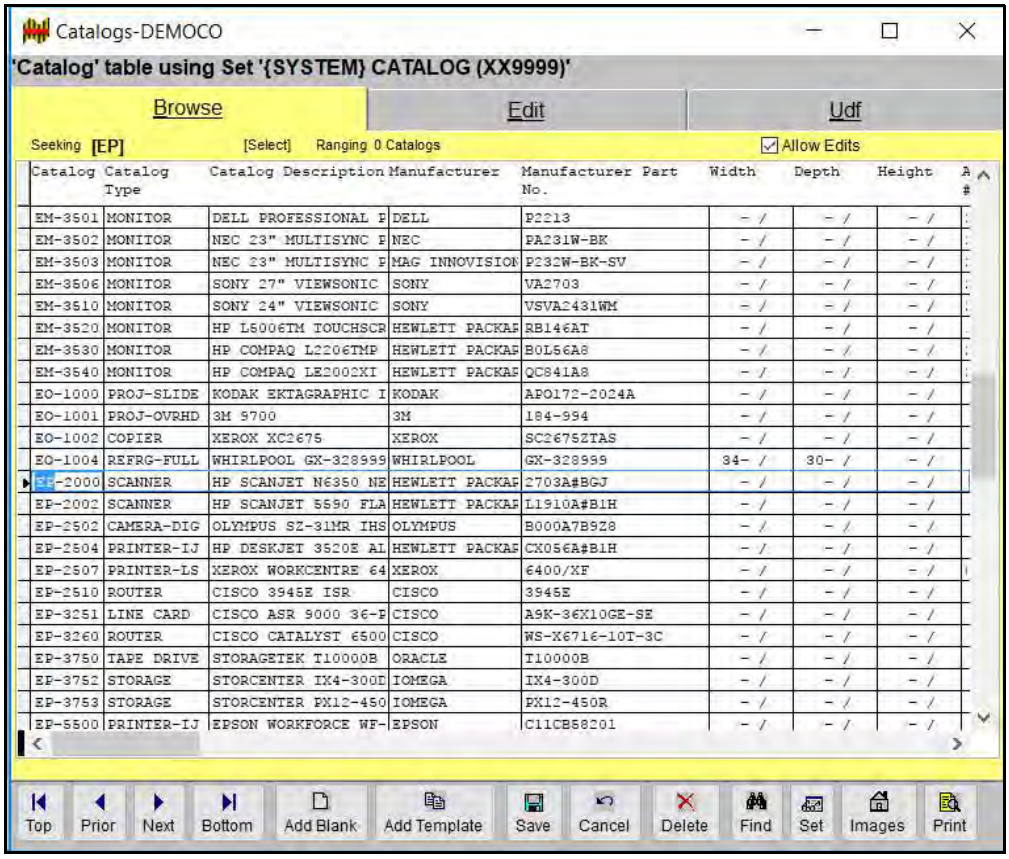


Or, if you have selected to have the Table Tool Bar (icons for all of the tables) appear on your Main Menu, you may open the Catalog table by clicking on the corresponding icon shown below.

Using either method, the Catalog table will open.

THE BROWSE TAB

The Catalog table similar to the following will appear.



Catalog	Catalog Type	Catalog Description	Manufacturer	Manufacturer Part No.	Width	Depth	Height	A #
EM-3501	MONITOR	DELL PROFESSIONAL P	DELL	P2213	- /	- /	- /	
EM-3502	MONITOR	NEC 23" MULTISYNC P	NEC	PA231W-BK	- /	- /	- /	
EM-3503	MONITOR	NEC 23" MULTISYNC P	MAG INNOVISION	P232W-BK-SV	- /	- /	- /	
EM-3506	MONITOR	SONY 27" VIEWSONIC	SONY	VA2703	- /	- /	- /	
EM-3510	MONITOR	SONY 24" VIEWSONIC	SONY	VSVA2431WM	- /	- /	- /	
EM-3520	MONITOR	HP LS006TM TOUCHSCR	HEWLETT PACKAR	RB146AT	- /	- /	- /	
EM-3530	MONITOR	HP COMPAQ L2206TMP	HEWLETT PACKAR	B0L56A8	- /	- /	- /	
EM-3540	MONITOR	HP COMPAQ LE2002XI	HEWLETT PACKAR	QC841A8	- /	- /	- /	
EO-1000	PROJ-SLIDE	KODAK EKTAGRAPHIC I	KODAK	APO172-2024A	- /	- /	- /	
EO-1001	PROJ-OVRHD	3M 9700	3M	184-994	- /	- /	- /	
EO-1002	COPIER	XEROX XC2675	XEROX	SC2675ZTAS	- /	- /	- /	
EO-1004	REFRG-FULL	WHIRLPOOL GX-328999	WHIRLPOOL	GX-328999	34- /	30- /	- /	
EP-2000	SCANNER	HP SCANJET N6350 NE	HEWLETT PACKAR	2703A#BGJ	- /	- /	- /	
EP-2002	SCANNER	HP SCANJET 5590 FLA	HEWLETT PACKAR	L1910A#B1H	- /	- /	- /	
EP-2502	CAMERA-DIG	OLYMPUS SZ-31MR IHS	OLYMPUS	B000A7B9Z8	- /	- /	- /	
EP-2504	PRINTER-IJ	HP DESKJET 3520E AL	HEWLETT PACKAR	CX056A#B1H	- /	- /	- /	
EP-2507	PRINTER-LS	XEROX WORKCENTRE 64	XEROX	6400/XF	- /	- /	- /	
EP-2510	ROUTER	CISCO 3945E ISR	CISCO	3945E	- /	- /	- /	
EP-3251	LINE CARD	CISCO ASR 9000 36-P	CISCO	A9K-36X10GE-SE	- /	- /	- /	
EP-3260	ROUTER	CISCO CATALYST 6500	CISCO	WS-X6716-10T-3C	- /	- /	- /	
EP-3750	TAPE DRIVE	STORAGETEK T10000B	ORACLE	T10000B	- /	- /	- /	
EP-3752	STORAGE	STORCENTER IX4-300D	IOMEGA	IX4-300D	- /	- /	- /	
EP-3753	STORAGE	STORCENTER PX12-450	IOMEGA	PX12-450R	- /	- /	- /	
EP-5500	PRINTER-IJ	EPSON WORKFORCE WF-	EPSON	C11CB58201	- /	- /	- /	

The Browse tab is selected by default. This tab permits you to select catalogs, then you can add, change, delete, set, and view the different Catalog entries.

Note that the Catalogs listed in the above screen meet the criteria previously established by the Set feature. In the illustration above, the Set is Catalog Number.

The Set Button

On the Catalog table, the Browse panel is selected by default. The catalog information on the Browse panel can be sorted by any field that is part of the Catalog table. Place your cursor in the first column on the left, press your right mouse button, and then select the Order By that will be displayed, or select the Set button on the tool bar as shown below.

This feature will give you the ability to look at all of the catalogs, pre sorted the way you specify. If you do not specify another sort, the default sort is by Catalog number.

CREATING AN ORDER AND FILTER - THE SET MODE

The Set feature allows you to order and identify a smaller, more manageable group of catalogs from which to select, e.g., only those catalogs made by a particular manufacturer, or only a specific type such as all of your desks, etc.

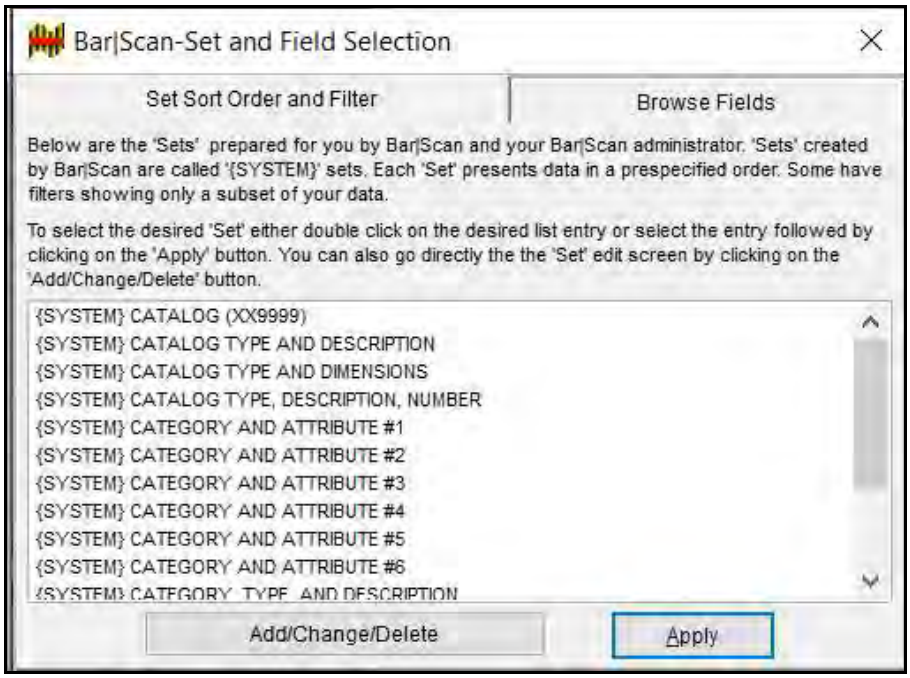
As the number of catalogs on your system increases it becomes more time consuming to look through the entire list of catalogs displayed on a look up window.

Set permits the “ordering” (or sorting) of your catalogs by any item in the database. This makes it easier to find catalogs.

Because Set offers almost endless possibilities for identifying groups of catalogs, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with Set will NOT cause any change to the information recorded for any catalog. It merely specifies the sequence of catalog selection lists.

When you want to view your catalogs in an order other than by catalog number, select Set, by clicking on the button shown below.

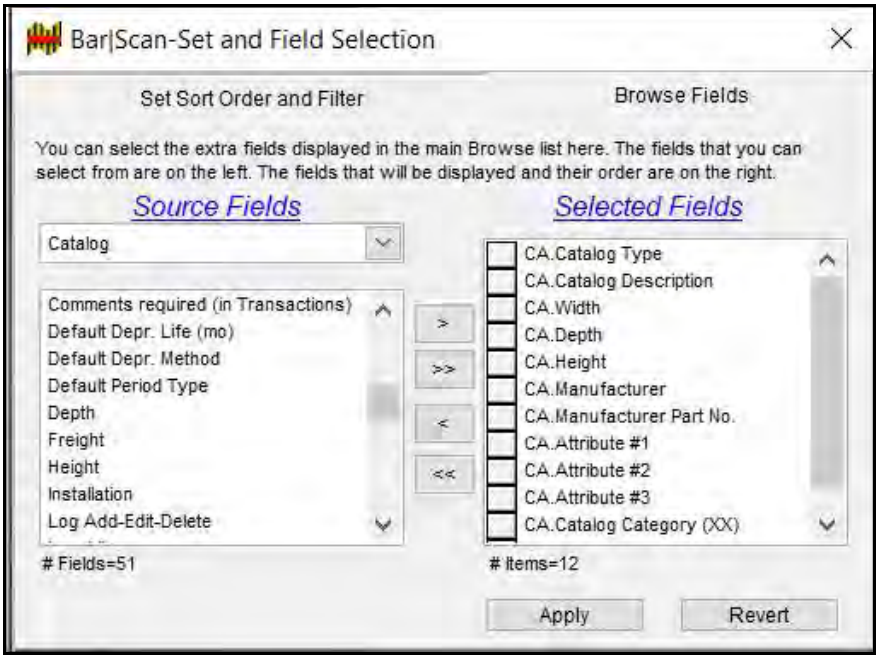
This button activates the Set feature, and the following screen will appear.



This Set Order and Filter tab, shows a list of Sets that are pre defined in the Bar|Scan system. You can, however, define additional Sets. Simply click on the Add/Change/Delete button shown above, and the Sets table will open.

However, if you would like to browse the fields that are available for the predefined Sets, add a field, or remove a field, select the Browse Fields tab.

When you select the Browse Fields tab, you will be shown the following screen.

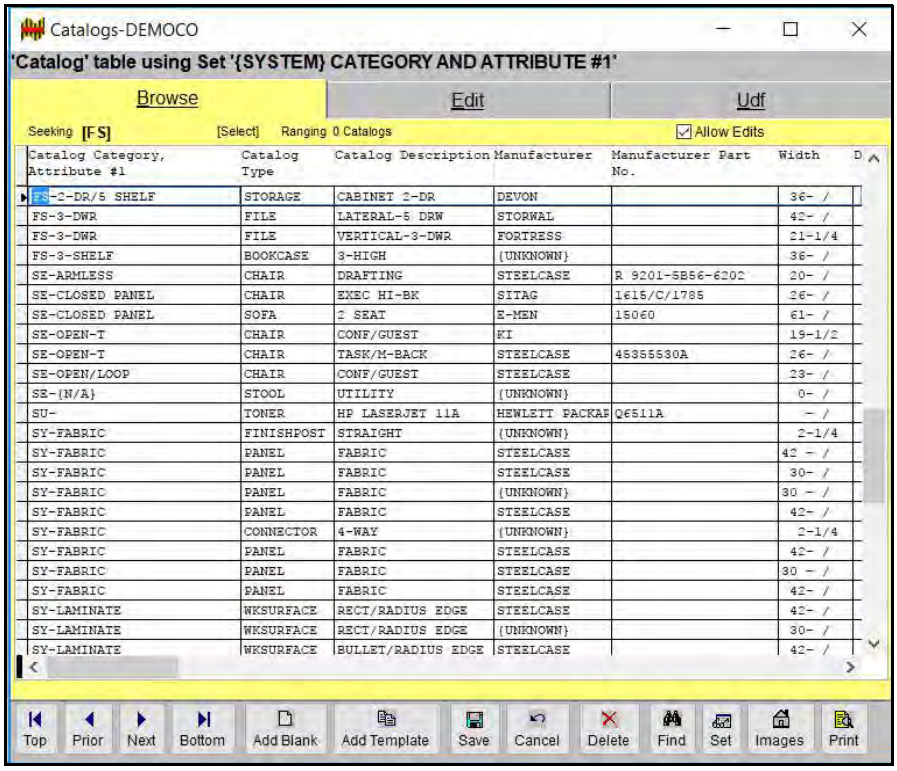


On the left side of this screen there is a list of all of the available fields for the Catalog table that you may display as columns on your Browse tab. On the right side of this Browse Fields tab, you will see the current fields that are displayed for each Set. These fields are displayed for all of the different Sets. The first column, however, displays what the Set is, therefore, what the table is sorted by.

Respectively, each individual Set can have a filter set up to filter out items that you do not wish to see. Using a filter, however, will slow down the process, and may cause your table to open very slowly if the Set you used last before closing the table had a filter on it.

The Set feature is a powerful tool, and you should be experiment with it. Notice that the items that are chosen to be displayed from the right side of the above screen can be moved to any order you desire while being displayed.

In order to better demonstrate this concept, select one of the pre defined Sets from the Set Order and Filter Tab. You will see the items sorted by different criteria, but the columns (with the exception of the first column) remain the same.



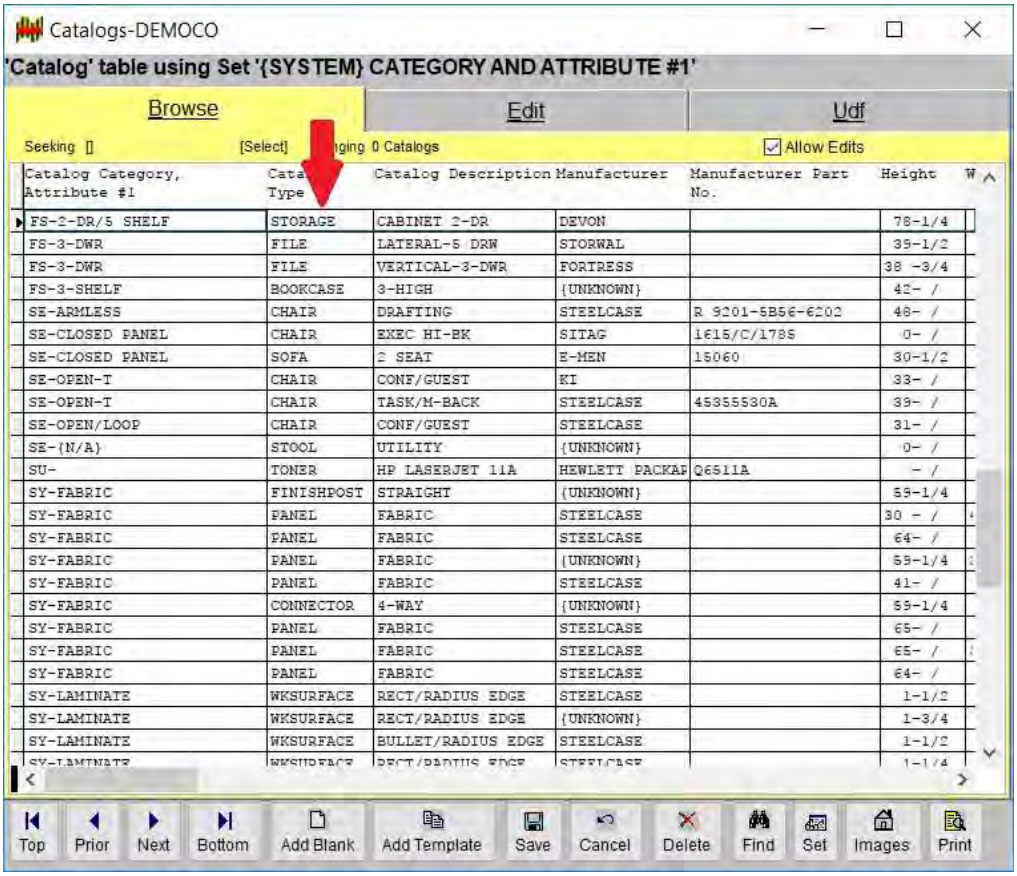
The Category and Attribute #1 Set was chosen as the Set for the screen shown above. Notice that the rest of the columns are still the same as they were when sorted by Catalog number, i.e., Catalog Type, Catalog Description, etc. The only column that changed was the sort by column, the first column displayed. An Order by (sort) column can contain more than one item, as in our example. No matter what sort used, the rest of the columns stay the same unless you change them.

You can also change the order in which the columns are displayed. If you change the order of the columns by moving a column to the left, the other columns will adjust to fill in the spaces.

Changing the Order of the Columns Shown in a Set

If a column is shown twice, you may not need or want to view it the second time. You can move the second column by clicking on its title with your left mouse button, holding the mouse button down, and moving your mouse to the right or left. The columns will move to fill in the gaps as you move your mouse. This is a useful tool and much faster than respecifying the columns for a Set.

To move a column in a set, reposition your cursor to the grey area at the top of the column, and your cursor will turn into a down arrow. Left click, and hold the mouse button down, while dragging your mouse to the left or right, and the column of information will be moved, and the other columns will adjust to fill in any space. The cursor, being placed to move the column is displayed below.



Catalog Category, Attribute #1	Cata Type	Catalog Description	Manufacturer	Manufacturer Part No.	Height	W
FS-2-DR/5 SHELF	STORAGE	CABINET 2-DR	DEVON		78-1/4	
FS-3-DWR	FILE	LATERAL-5 DRW	STORWAL		39-1/2	
FS-3-DWR	FILE	VERTICAL-3-DWR	FORTRESS		38 -3/4	
FS-3-SHELF	BOOKCASE	3-HIGH	{UNKNOWN}		42- /	
SE-ARMLESS	CHAIR	DRAFTING	STEELCASE	R 9201-5B56-6202	48- /	
SE-CLOSED PANEL	CHAIR	EXEC HI-BK	SITAG	1615/C/178S	0- /	
SE-CLOSED PANEL	SOFA	2 SEAT	E-MEN	15060	30-1/2	
SE-OPEN-T	CHAIR	CONF/GUEST	KI		33- /	
SE-OPEN-T	CHAIR	TASK/M-BACK	STEELCASE	45355530A	39- /	
SE-OPEN/LOOP	CHAIR	CONF/GUEST	STEELCASE		31- /	
SE-{N/A}	STOOL	UTILITY	{UNKNOWN}		0- /	
SU-	TONER	HP LASERJET 11A	HEWLETT PACKAR	Q6511A	- /	
SY-FABRIC	FINISHPOST	STRAIGHT	{UNKNOWN}		59-1/4	
SY-FABRIC	PANEL	FABRIC	STEELCASE		30 - /	
SY-FABRIC	PANEL	FABRIC	STEELCASE		64- /	
SY-FABRIC	PANEL	FABRIC	{UNKNOWN}		59-1/4	
SY-FABRIC	PANEL	FABRIC	STEELCASE		41- /	
SY-FABRIC	CONNECTOR	4-WAY	{UNKNOWN}		59-1/4	
SY-FABRIC	PANEL	FABRIC	STEELCASE		65- /	
SY-FABRIC	PANEL	FABRIC	STEELCASE		65- /	
SY-FABRIC	PANEL	FABRIC	STEELCASE		64- /	
SY-LAMINATE	WKSURFACE	RECT/RADIUS EDGE	STEELCASE		1-1/2	
SY-LAMINATE	WKSURFACE	RECT/RADIUS EDGE	{UNKNOWN}		1-3/4	
SY-LAMINATE	WKSURFACE	BULLET/RADIUS EDGE	STEELCASE		1-1/2	

The SET feature works in conjunction with adding, changing, deleting, and viewing catalogs, allowing you to order and identify a smaller, more manageable group of catalogs from which to select, e.g., only those catalogs from a particular manufacturer.

As the number of Catalogs on your system increases it becomes more time consuming to look through the entire list displayed on a look up window.

Set enables you to “order” your Catalogs by any item in the Catalog File. This makes it easier to find particular Catalogs.

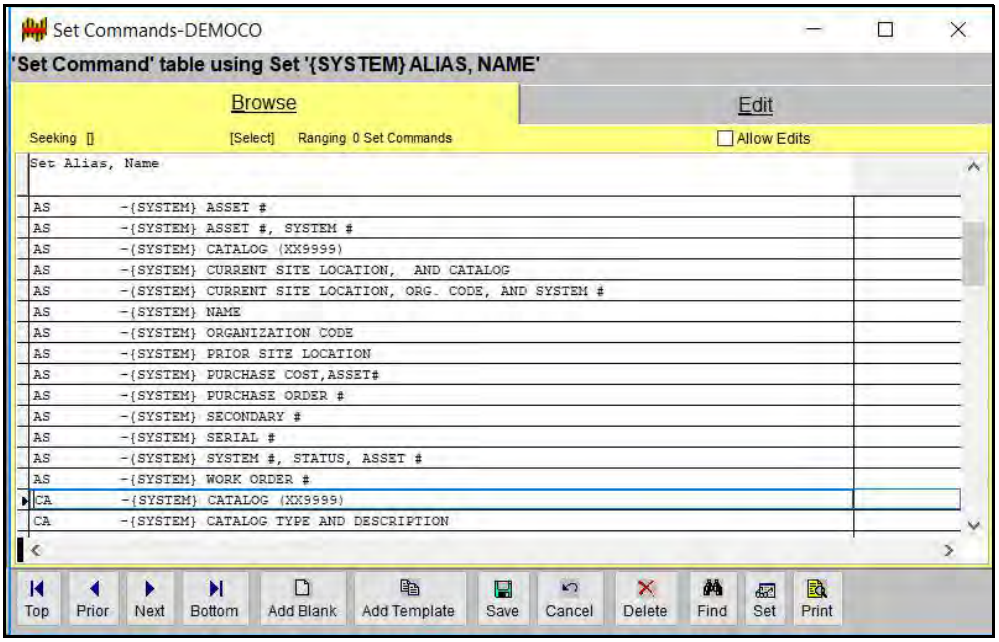
Set enables you to define a "filter" which will reject the Catalogs which do not meet your specifications. Set provides several "filter" items.

Further, you can define a "range" for a filter item by selecting and marking a block when you are presented the list.

Finally, you can identify more than one filter and/or range to further reduce the number of Catalogs to search.

Because Set offers almost endless possibilities for identifying groups of Catalogs, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with Set will NOT cause any change to the information recorded for any Catalog. It merely specifies the way that the Catalogs will be sorted.

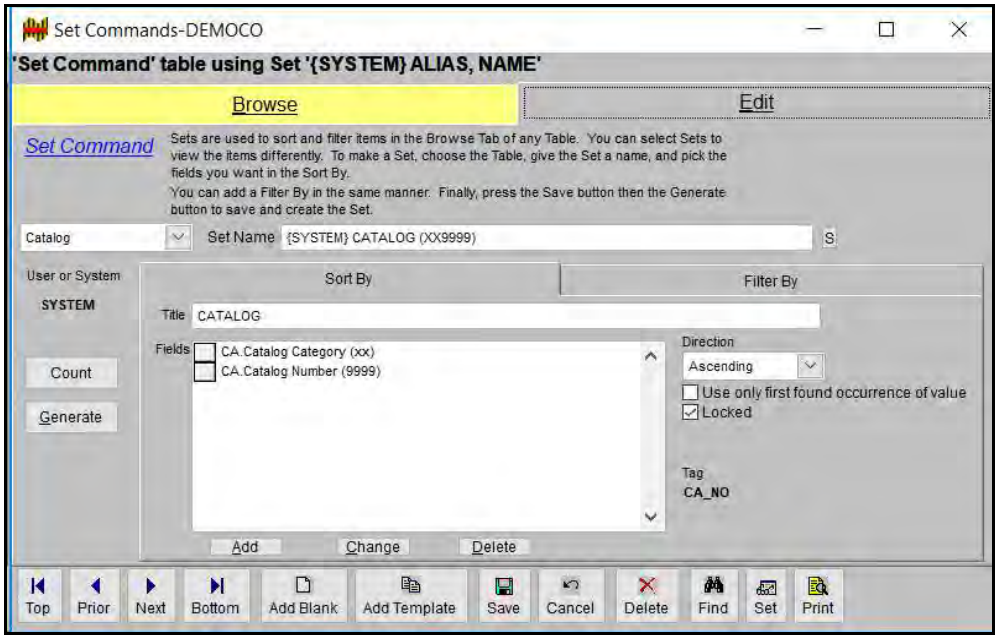
If none of the Sets already created satisfy your needs, you can define a new Set. This is done by choosing the Set icon from the tool bar, then choosing the Add/Change/Delete button, or from the Main Menu, select File . . . ▸, then Open . . . ▸, then *Sets*. You will see the following Sets table.



Select a set that is similar to the one you want to add, and then select the Add Template or Add Blank icon from the tool bar. Or, select the Set you want to change. Then, choose the Edit tab.

Note: You cannot change System Sets. If you want to change a System Set, simply add a template of that Set, and then change the template.

You will be shown a window similar to the one below.



If you are using a Set as a Template to add a new Set, the old set will appear on this tab. Type a new name for your Set. Type a new Title, similar to the Set Name. In the Fields box, select a field, then, below the Fields box, select to Add, Change, or Delete that field. Add any field(s) that you would like to sort your Catalog table by. Make sure that you do not have any unnecessary fields listed from a previous Set.

Select the Save icon from the tool bar, to Save your new Set.

Note: In order to use your new Set, you must **Generate** it. In order to Generate a Set, you must be the only one in Bar|Scan (the only one in this company) and you must have all other panels showing the catalogs closed. Close all panels except the one shown above, and your Main Menu. Then, select the Generate button, located to the left of the Fields box. You will know that your new Set has been created when the item on the bottom right of the panel no longer says Dynamic under the word Tag, but lists a number similar to this: CU_00000015. The example above lists CA_NO, but this is simply because it is a System set, your new sets should list a CU_00000015 type of a number.

Once your Set has been Generated, you may close this panel.

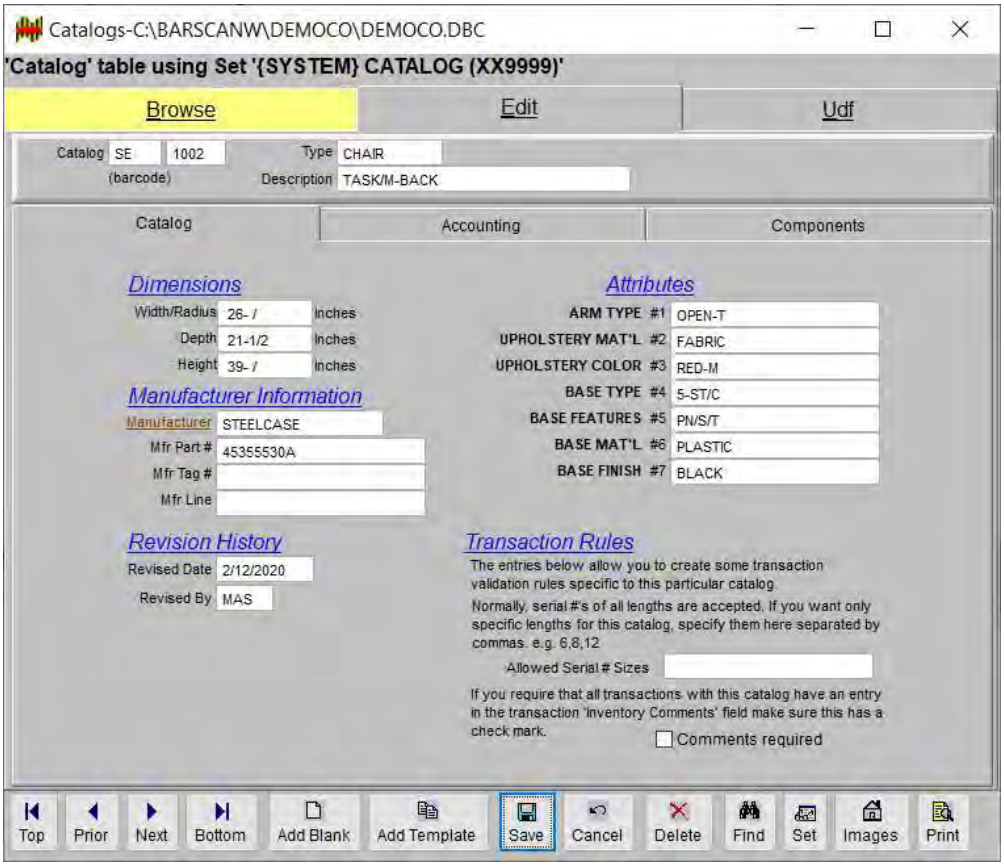
Pressing the X at the top right of the window or the ESC key returns you to the Main Menu. Note if you have pending changes or deletions you will be prompted to cancel or save these changes or deletions before you will be allowed to exit the Set panel.

From the Main Menu, again open your Catalog table. Once the Catalog table is open, select the Set icon from the tool bar, and select your new Set. Click on the Apply button, and your table will sort according to your new Set.

For specific instructions about cursor movement keys, function keys, and how to operate the look up windows, see chapter five of this User Manual, Operating the System.

THE EDIT TAB

When you want to see the details of a Catalog, you will need to choose the Edit tab. Choose a Catalog Number and press ENTER. Then, select the Edit tab and the Catalog Edit screen will be displayed, similar to the one below.

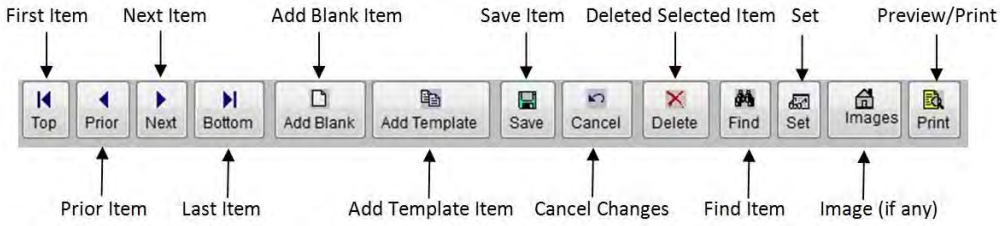


The Catalog Tab

On this panel, you may Add, View, or Change your Catalog entries.

You may simply start typing to change the existing Catalog, or select the Add Blank or Add Template button from the tool bar to add a new Catalog.

The tool bar at the bottom of the Catalog table is displayed below.



You may press the PgDn key, or the Next Item button to view the next Catalog Number from the selection list. The PgUp key or the Prior Item button will display the previous Catalog Number. Ctrl + Home key combination or the First Item button will display the first Catalog Number on the selection list, and the Ctrl + End key combination or the Last Item button will display the last.

You may use any of the following: Add Blank, Add Template, Save Selected Items, and the Cancel Changes on the Edit tab.

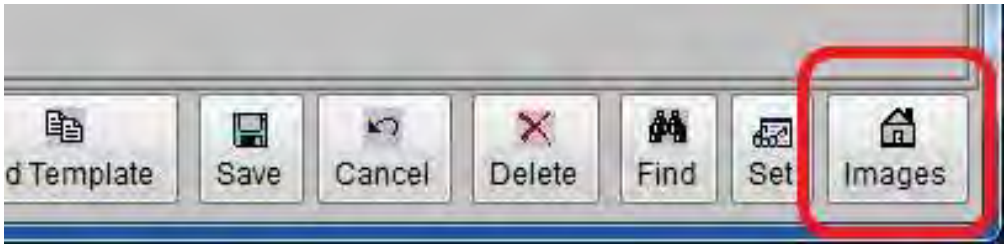
In order to use the Delete Selected Item(s) icon, you must go to the Browse panel, use the Range feature to select the desired Catalog(s) and press the ENTER key. Then, you can select the Red X (Delete Selected Item) icon. You will be asked to confirm your deletion.

Note: You can select to turn off the confirmations in the Personal Program Preferences section, listed on the Main Menu, on the Edit drop down menu.

Viewing the Images

If you have purchased the optional Imaging Module for your Bar|Scan system, then you have the ability to view the pictures of your items, and print them out directly onto your catalog reports.

Once the Catalog has been entered, and you have one or more pictures in your system and associated with it's, you may use the Imaging button to view your picture. The imaging button is located on the tool bar, next to the Set button as shown below.



Remember, you can also see the Image on the Browse Tab.

If you have an image for a catalog, and you are printing Catalog sheets, the image will now automatically print inside the box.

You may choose to print an image as part of any other Catalog report also, by choosing the Catalog Picture field as one of your columns. The defaulted size for this picture is one inch square, but the size can be changed in the same manner that you change the width of any other field. Notice, the image size is defaulted to a square, so, if you make the field three inches wide, your picture will print 3 inches tall.

A Word on Bitmaps

The images that Bar|Scan prints out have to be in a bitmap (.BMP) format.

If you import an image that is not a bitmap format, Bar|Scan will copy it, and convert it to a bitmap image before it can print it out. This copy and convert process is done behind the scenes automatically and you would probably never know it, except if you actually looked at the files using Windows Explorer and notice their file extensions.

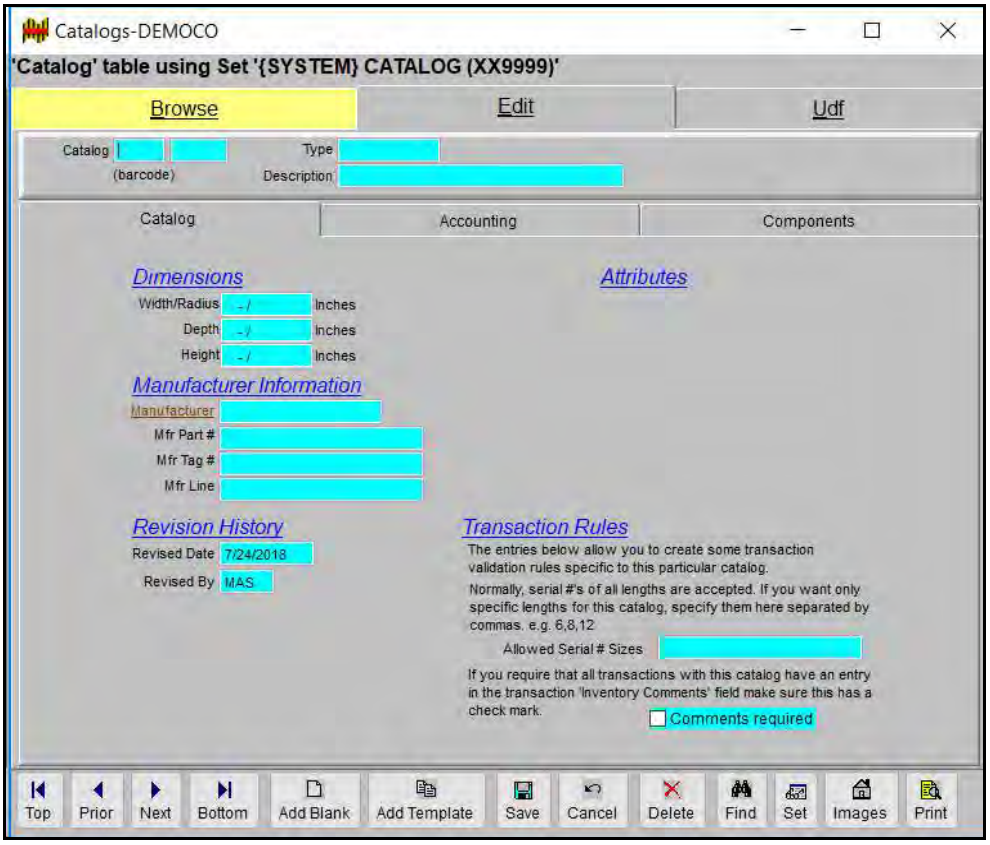
The conversion process that Bar|Scan uses, supports most of the major formats.

Images are discussed in more detail in *Appendix B - Imaging.*

Entering a New Catalog

You will need to add Catalogs to your Bar|Scan system on an ongoing basis. In order to add a Catalog, you may select the Add Blank Item or the Add Template Item button from the tool bar.

What is the difference between Add Blank Item, and Add Template Item? You need to select Add Blank, for your first Catalog entry, as you will not have any Catalogs to use for a template. If you choose Add BLANK Item, and then select the Edit panel, you will be shown the Catalog Edit panel and with no information displayed in any of the entry fields as shown below.



On this screen you may enter all of your Catalog information. The number of Attributes available will be displayed when you have chosen the Catalog Category.

You have to choose Add Blank for your first Catalog, as you will not have a template to use. But, after you have entered at least one Catalog, it is not necessary to add from a blank. Adding from a Blank will always be available to you, but it is most often desirable to select Add Template Item icon once you have at least one Catalog in that Category.

Adding from a template Catalog is a time saver. Often you can choose a Catalog of a like item for your template, and only have to change the information that is different for your new item, i.e., if you are adding a Laser Printer, selecting a Catalog for a Laser Printer, you would only need to change the Catalog number, the Model, Manufacturer, and Manufacturer's Part Number, and at times the Manufacturer may even be the same.

Hint: Add Template Item is a useful feature, however you are required to change the Catalog Number prior to saving the new catalog.

When on the Browse panel, move through the list of Catalogs until you find the Catalog that you wish to use for a Template. When the desired Catalog Number is found, move the highlight bar over it and press ENTER or click on the Catalog with your mouse. Select the Add Template Item icon, and then select the Edit tab. You will see all of the information that has been entered for this Catalog. Simply change all of the fields to match the information for your new Catalog, and Save the new Catalog.

You may choose Add Blank Item or Add Template Item from the Edit Screen without returning to the Browse screen.

Hint: Remember that you should always enter your initials and the current date when entering new Catalogs. When available, it is a time saver to use a Catalog with the current date and your initials as your Template.

Press ESC to return to the Main Menu. Note: If you have pending changes or deletions, you will be asked to Save or Cancel the changes first before you are allowed to exit this panel.

Entering the New Information

After you have selected a blank screen or a similar Catalog number, the information will be displayed and the cursor will be positioned for you to enter the new Catalog Number.

You may use the arrow keys, the TAB key, the mouse, or the ENTER key to move to the different items on the screen. The PgUp and PgDn keys, as well as the Previous Item and Next Item buttons, will display information from the previous or next Catalog Numbers respectively.

Many of the entry items have associated look up windows to assist you with your entry. The following section will describe each item on the Catalog Entry Screen and provide instructions on how to enter the information. See *Chapter 5 - Operating the System* for general instructions on the use of the different features and keys.

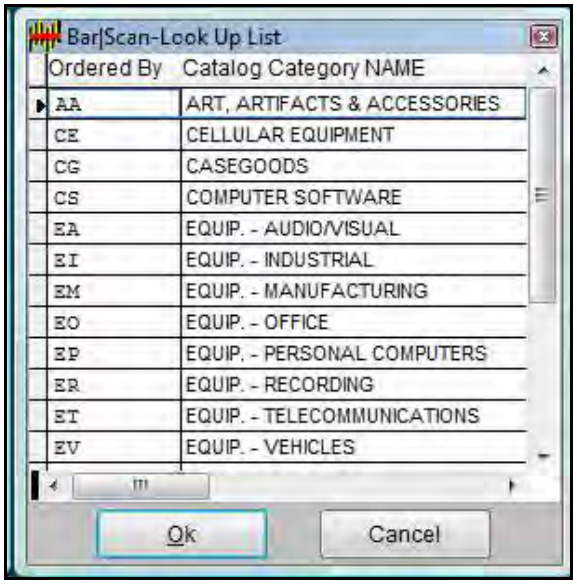
The Catalog Number

The Catalog Number consists of two parts, a two-letter Category, and a four-digit number.

Bar|Scan provides a list of predefined Categories from which to choose. But, you may add a Category of your own, by going to the Main Menu, and select File, then Open . . . ▸, then Catalog . . . ▸, then Categories. This is discussed in detail later in this chapter.

Each Catalog must have a four-digit number associated with the two letter Category. These numbers are assigned by you for each Category. The numbers can be assigned consecutively, or can be assigned a meaning, e.g., 1**xxx** could mean servers, and 2**xxx** could mean printers, etc., for the EP (Equipment PC) Category.

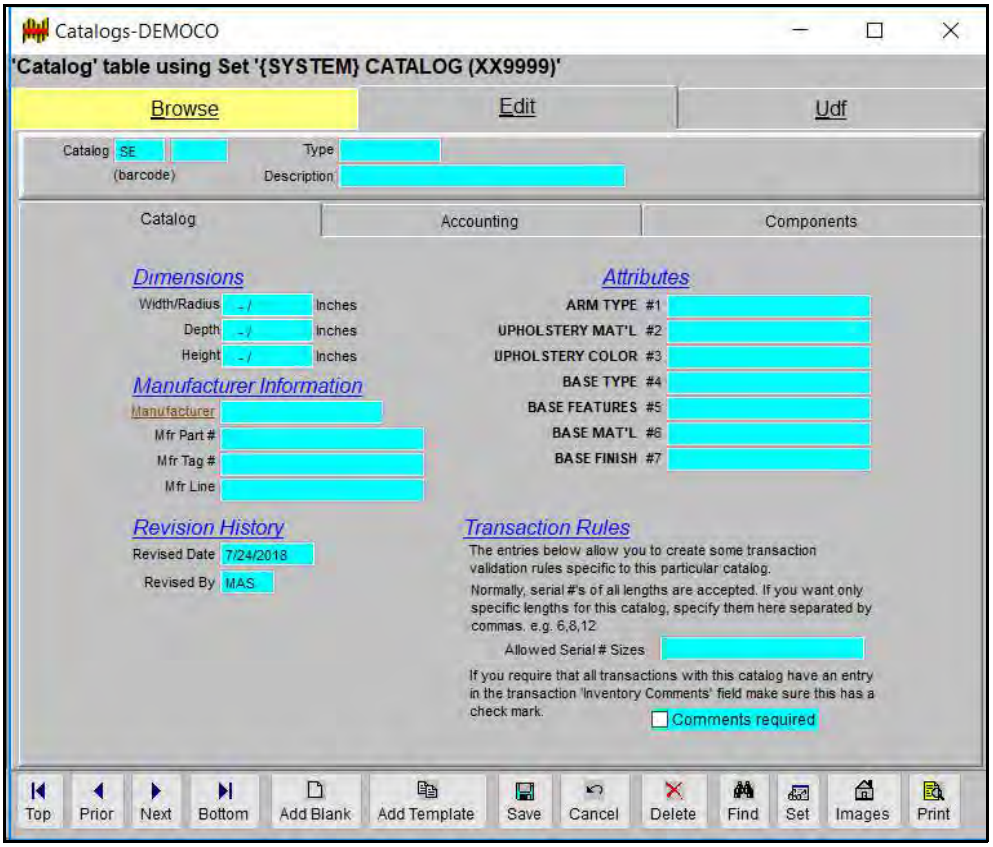
You first need to enter a Category. You may wish to view the available categories. If you want to see a list of the available categories, place your cursor in the Category field and right click (or press the F5 key) and select Look up Value. You will be shown a look up window similar to the one below.



You may insert one of these values onto the Edit panel screen by selecting it and then choosing “OK” or select the desired Category and press the ENTER key.

Hint: Bar|Scan is shipped to you with a number of Categories already defined. You can, however, create as many new Categories as you wish. This feature is described for you later in this chapter.

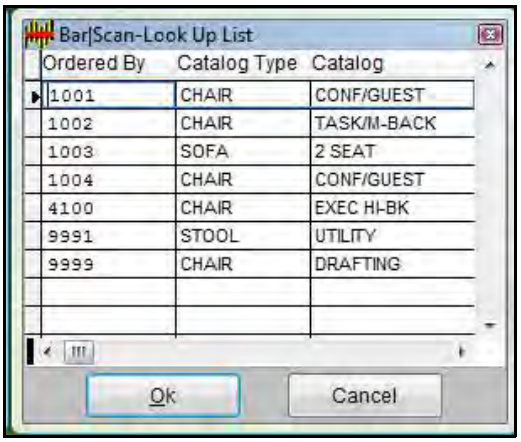
The screen will display the attributes which are appropriate for Category you have selected as shown in the following example.



In the example, we selected the Catalog Category SE for Seating. Notice there are now seven attribute fields listed on the right, with a description of each next to the empty field.

Next, you will need to enter the four digit Catalog number.

Again, you may use your mouse to right click on this field or press the F5 key, and select Look up Value. You will be shown a look up window similar to the following.



Note: Looking up the Catalog numbers that are already being used in your Bar|Scan system may be helpful, but it is not possible to save two different Catalogs with the same number. So, even if you choose one of these numbers, you will have to make a change to it before your Catalog can be saved.

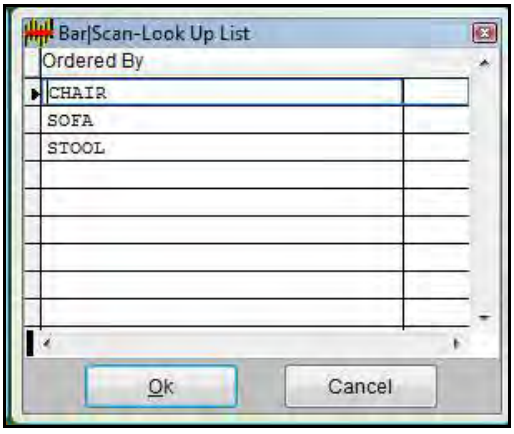
You can use the above window to assist you so you will not duplicate an existing number, and use the next available number.

Type

You are requested to enter a name of the new Catalog item. Bar|Scan provides space for up to 10 characters for the *Type*. Usually this name is one or two words that generally describe the Catalog item. Further and more detailed information is entered using the *Description* and *Attributes* entries.

If 10 characters are insufficient, the length of the Type as well as other fields can be modified using the User Defined Fields Module.

Your Bar|Scan system will arrive with some pre defined Catalog types in it. You may then add to, change, or delete items in this list. When you want to view the look up window for the Catalog type, right click on the type field or press the F5 key, select Look up Value, and you will be shown a look up window similar to the following.



You may select a type from the above window or type a new one. When finished entering the type, press ENTER. If you have elected to type in the item, and have pressed <Enter>, Bar|Scan will check your look up list. If the item you typed is not in the look up list, you will be prompted to add it to the list. Note: You will not be able to save a Catalog that has a value in a field that is not in the look up list.

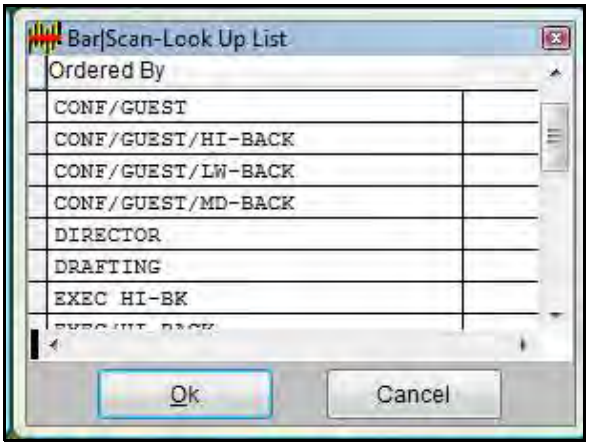
Note: If the item you typed should be in the list, and you are prompted to save the new item, you may have simply typed it differently. For consistency, use the Look up Value to select the one that already appears in the list.

If the type is correct, respond Yes to save the new type. It will be added to your look up list for future use.

Description

This entry provides space for up to 19 characters which is used to further describe the new Catalog item.

Your Bar|Scan system will arrive with some pre defined Catalog descriptions in it. You may then add to, change, or delete items in this list. When you want to view the look up window for the Catalog description, right click on the description field or press the F5 key, select Look up Value, and you will be shown a look up window similar to the following.



You may select a description from the above window or type a new description. When the entry has been completed, press ENTER. Again, if the item you typed is not already in the look up list, you will be prompted by a dialog box to add it to the list. If you respond "Yes" to this dialog box, your description will be added to the look up list for future use.

Note: Using the Look up Value to search for the fields is also a good way to keep from entering duplicate Catalogs. By searching for a description, you may find that you will keep your data much more consistent, and have much less chance of duplicated information.

Dimensions

For some assets, size is an important part of their description. Bar|Scan provides space to enter the three dimensions: Width, Depth, and Height.

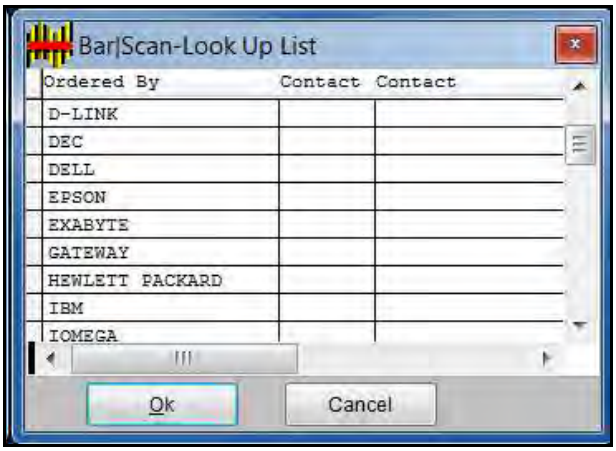
Dimensions are entered in inches and fractions of an inch. Three digits are provided to permit entries of up to 999 inches. Fractions are permitted, but care should be taken to avoid getting too specific as it may cause duplicate catalogs later on. We recommend that fractions are rounded to the nearest 1/4".

After each entry press <ENTER> if the entire field is not filled. If you fill the entire field, your cursor will automatically move to the next field.

Most IT, Office Equipment or Telecommunications assets do not require the collection of dimensions as this information is readily available from specification sheets posted on the Internet should this be important at a later date.

Manufacturer

Bar|Scan provides a list of many manufacturers from which to choose for each Catalog Category. You may then add to, change, or delete items in this list. When you want to view the look up window for the Catalog Manufacturer, right click on the Manufacturer's field press or the F5 key, select Look up Value, and you will be shown a look up window similar to the following



Start to type the manufacturer's name or scroll the list to reach the desired Manufacturer. You may then select it from the list in the window and press <ENTER> or the click on the OK button.

If the desired manufacturer is not displayed, you may simply type in the new name.

See the subsequent section *Manufacturers* for additional information on adding to, changing, or deleting items from the Manufacturer's table.

Manufacturer's Part Number

Bar|Scan allows you to enter the Manufacturer's Part or Item number for each catalog that you create. This can be a very important item when exporting information to other systems such as a furniture specification system.

If you use the Look up Value for this field, you may find that you already have a Catalog entered with an exact part number. In this manner, you can avoid entering duplicate information.

Type the Manufacturer's Part Number in the window and press ENTER.

Manufacturer's Tag Number

Bar|Scan allows you to enter the Manufacturer's Tag Number for each catalog that you create.

This can be a very important item when exporting information to other systems such as a furniture specification system.

Type the Manufacturer's Tag Number in the window and press ENTER.

Manufacturer's Line Number

Bar|Scan allows you to enter the Manufacturer's Line Number for each catalog that you create.

This can be used to group similar Catalogs along product line. Often furniture manufacturers will identify items by a tag number that is different from the Part Number. Reports can be printed for groups of items that match the tag number.

Type the Manufacturer's Line Number in the window and press ENTER.

Attributes

Attribute fields are provided by Bar|Scan to further describe the asset being cataloged. Another purpose of the Attributes entries is to make sure that each Catalog item describes something different. The descriptions of some assets may only differ by the color or material.

Important: Because of the vast number of different types and models of Computer and Office Equipment, Attributes are usually NOT recommended for these Catalogs. Usually, it is best to create User Defined Fields in the Asset Table. This helps to keep the number of Computer or Office Equipment Catalogs to a reasonable quantity.

The number of Attributes displayed will differ, depending on the Catalog Category selected. Also, the title for each Attribute will differ. This is because different Categories of assets are fully identified using different description methods.

A look up window is available for each attribute. Simply right click on the attribute field or press the F5 key, select Look up Value, and a look up window will appear to provide a list of choices. You may select one of the choices, or you may type a new one.

The following sample screen shows the Attributes provided for the Casegoods (CG) Category.

The following section identifies the available Attributes for each Category and a brief description of the information entered for each Attribute.

Attribute Definitions

Each predefined Catalog Category has a different set of Attributes associated with it. The following identifies the default Attributes available for each Catalog Category.

The Art, Artifacts, & Accessories (AA) Category provides space to identify the following six Attributes:

Attribute #1 - Artist
Attribute #2 - Edition/Serial #
Attribute #3 - Material/Media
Attribute #4 - Title
Attribute #5 - Frame Color
Attribute #6 - Matte Color

The Cellular Telephone Equipment (CE) Category provides space to identify the following four Attributes:

Attribute #1 - Category
Attribute #2 - Category
Attribute #3 - Subsidiary Account Number
Attribute #4 - Caution

The Casegoods (CG) Category provides space to identify the following seven Attributes:

Attribute #1 - Drawer configuration; Left
Attribute #2 - Drawer configuration; Center
Attribute #3 - Drawer configuration; Right
Attribute #4 - Top Material
Attribute #5 - Top Finish
Attribute #6 - Base Material
Attribute #7 - Base Finish

The Computer Software (CS) Category provides space to identify the following three Attributes:

Attribute #1
Attribute #2
Attribute #3

The Equipment - Audio/Visual (EA) Category provides space to identify the following two Attributes:

Attribute #1
Attribute #2

The Equipment - Industrial (EI) Category provides space to identify the following two Attributes:

Attribute #1
Attribute #2

The Equipment - Manufacturing (EM) Category provides space to identify the following three Attributes:

Attribute #1
Attribute #2
Attribute #3

The Equipment - Office (EO) Category provides space to identify the following two Attributes:

Attribute #1
Attribute #2

The Equipment - Personal Computers (EP) Category provides space to identify the following seven Attributes:

Attribute #1
Attribute #2
Attribute #3

The Equipment - Recording (ER) Category does not have any attributes.

The Equipment - Telecommunications (ET) Category provides space to identify the following three Attributes:

Attribute #1
Attribute #2
Attribute #3

The Equipment - Vehicles (EV) Category provides space to identify the following three Attributes:

Attribute #1 - Model Year
Attribute #2 - Fuel
Attribute #3 - Feature

The Equipment - Warehouse (EW) Category does not have any attributes.

The Files and Storage (FS) Category provides space to identify the following six Attributes:

Attribute #1 - Dwr/Drs
Attribute #2 - Pull Style
Attribute #3 - Feature
Attribute #4 - Material
Attribute #5 - Finish
Attribute #6 - Lock

The Leasehold (LE) Category provides space to identify the following Attribute:

Attribute #1

The Lighting (LI) Category provides space to identify the following three Attributes:

Attribute #1 - Fixture Type
Attribute #2 - Shade/Top Finish
Attribute #3 - Base Finish

The Seating (SE) Category provides space to identify the following seven Attributes:

Attribute #1 - Arm Type
Attribute #2 - Upholstery Material
Attribute #3 - Upholstery Color
Attribute #4 - Base Type
Attribute #5 - Base Features
Attribute #6 - Base Material
Attribute #7 - Base Finish

The Supplies (SU) Category provides space to identify the following Attribute:

Attribute #1

The Systems Furniture Components (SY) Category provides space to identify the following seven attributes:

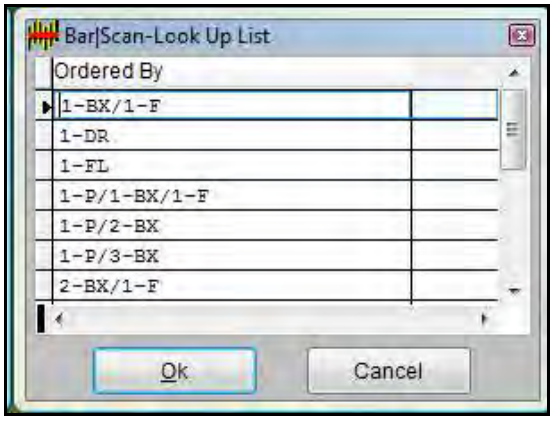
Attribute #1 - Surface #1 Material
Attribute #2 - Surface #1 Finish
Attribute #3 - Surface #2 Material
Attribute #4 - Surface #2 Finish
Attribute #5 - Frame/Trim Material
Attribute #6 - Frame/Trim Finish
Attribute #7 - Powered

The Tables (TA) Category provides space to identify the following seven Attributes:

Attribute #1 - Top Style
Attribute #2 - Edge Style
Attribute #3 - Base Type
Attribute #4 - Top Material
Attribute #5 - Top Finish
Attribute #6 - Base Material
Attribute #7 - Base Finish

Viewing and Selecting Attributes

You may wish to view the look up list for an attribute. This will allow you to look at the entire look up list, and view the way each attribute was entered. With your cursor on the space for that attribute, right click on the attribute field or press the F5 key, and then select Look up Value. You will be shown a look up window similar to the following.

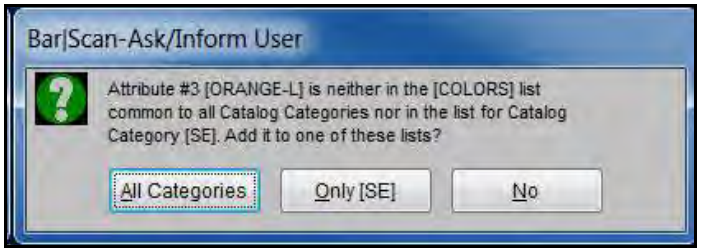


Note: the attributes will be different, depending on the Category you have chosen, and which number of attribute the look up list is for.

To select an attribute from the list, you can start typing the characters of the item you would like to use or use your mouse or arrow keys to move the highlight bar to the desired item and press the ENTER key, or the “OK” button.

Adding a New Attribute

When entering attributes, you have the option of simply typing them in. (For consistency in your database, we recommend that you view the attributes already entered). If you type an attribute which is not currently on the list (and press ENTER), you will be shown a dialog box with a message similar to the following.



If you click All Categories, the new attribute will appear on the selection list for all Categories, and if you click on Only SE the attribute will appear on a list specifically for Seating.

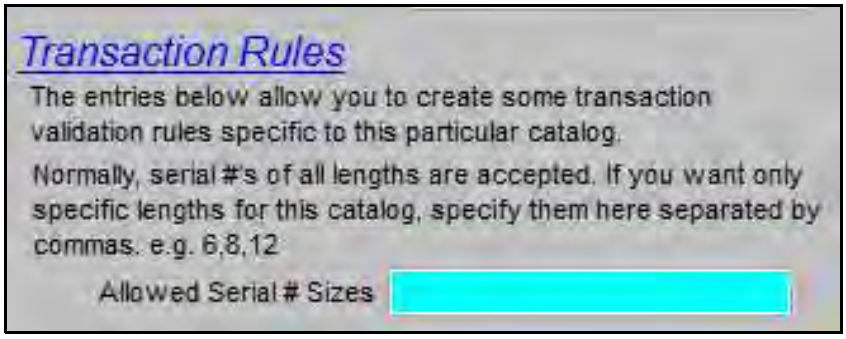
If you answer **N**(o), the new attribute will not appear on the selection. Note you will not be able to save a catalog that has an attribute which does not appear on the attribute list. Instead, when you attempt to save the Catalog, you will see a dialog box that tells you that one of your attributes is not in the attribute list, and you will be given an opportunity to save it to the list. If you do not save the new attribute to the look up list, Bar|Scan will consider the field to be invalid, and will not let you save the Catalog.

The reason it is not saved automatically, is for consistency's sake. If you often use the "1-bx/1-f" attribute for instance, and you type it "1 bx/1 f," you will be prompted to save the new one. Knowing that you normally use this attribute, you will know that it should already be in the list. By selecting the Look up Value, you will be able to select the attribute as it was previously entered into your database.

Transaction Rules

Bar|Scan allows you to create specific validation rules per Catalog.

Normally serial numbers of all lengths are accepted. If you wish to specify lengths for a particular Catalog, you can enter the acceptable serial number lengths here. This is very helpful to avoid scanning mistakes such as placing the scanable model number into the serial number field.



For example, most IT manufacturers produce their equipment with a distinct serial number series. Most of the time, the series is consistent within the product line. For example, DELL might produce a Flat Screen Display with two serial number lengths but only those two lengths. You then enter 10 and 14 into the 'Allowed Serial # Size" field for the Bar|Scan Catalog of the Dell Display.

Comments Required

Requiring Inventory Comments for particular Catalogs is also useful. For example, you might wish to ignore comments in your Mobile DeviceComputer except when scanning Servers. By indicating that Comments are required, Bar|Scan will not allow blanks to be accepted for the Catalogs that you have indicated.

Revision History

Revised Date and Revised By fields are the last items on the left of this tab, as shown in this partial panel below.

You should always change the date and initials on the Catalogs when you enter new catalogs.

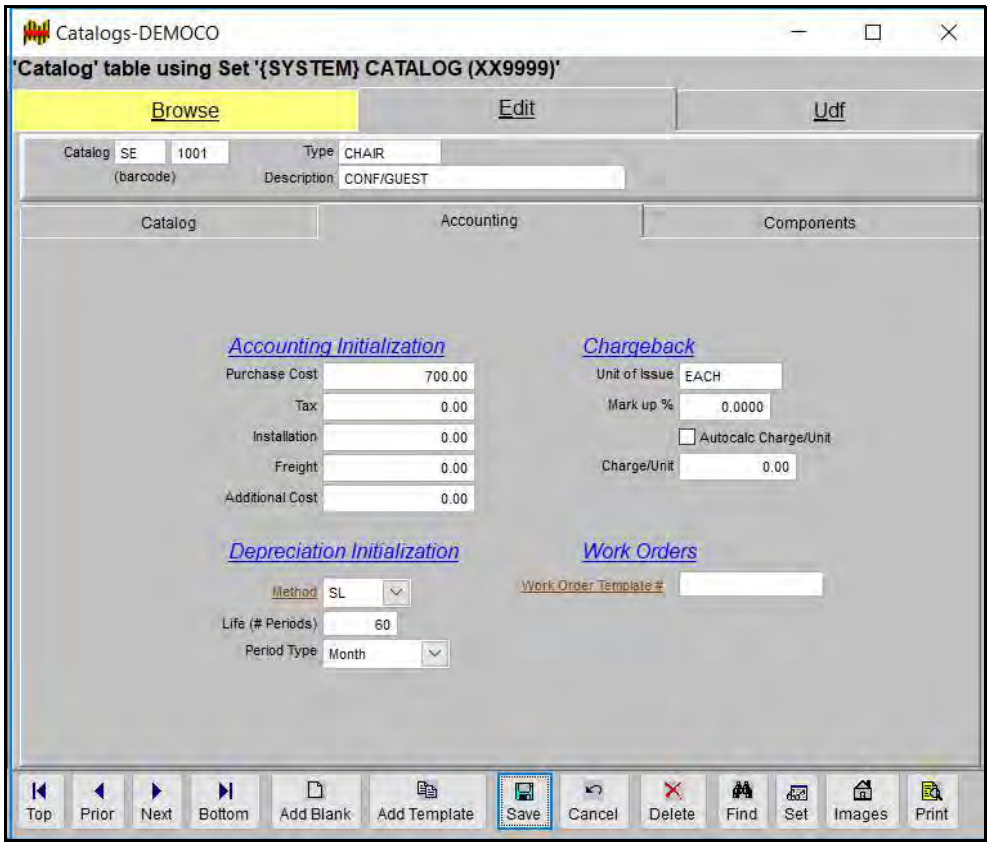
Note: Make changes to a catalog and when saved, the date and initials will automatically be changed to the current date and the initials of the person who logged into Bar|Scan.

Type numbers for the date and press ENTER. Then type your initials and press ENTER.

When you are finished, you should save your changes by clicking on the Save icon, or by typing the Ctrl + S key combination.

Accounting Tab

The Accounting tab is shown below.



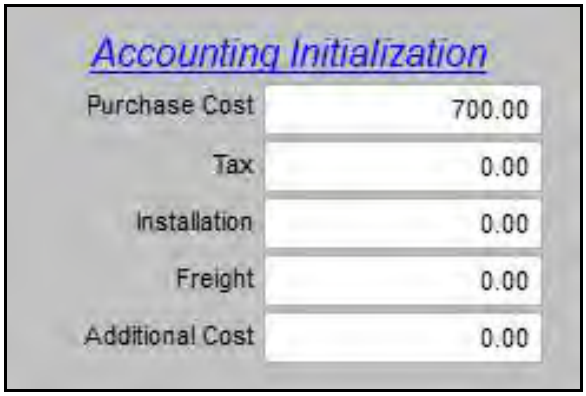
This information is entered on your Catalog table so that you do not have to hand enter accounting information onto all of your Assets or Work Orders.

To take advantage of this feature, the Catalogs are created before assets are entered into the system. Then, the accounting information is entered on this panel, in the Accounting Initialization portion of this panel.

When assets are entered and moved to the Asset table, this information is duplicated on the Asset table, according to the Catalog used.

Accounting Initialization

You can initialize any new asset Purchase Cost, Tax, Installation, Freight, and Additional Cost by entering default cost information here.



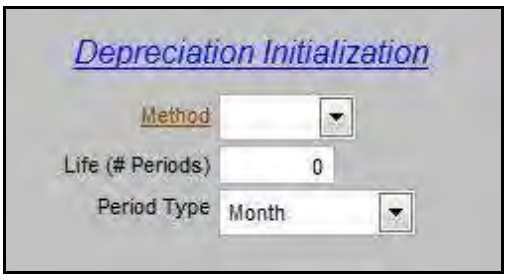
When a new asset is entered, it will contain the cost information which is displayed here. This information can later be revised by you. If you need to change the accounting information for an asset after this information is placed in the asset table, you can enter new information and save your changes. Because the information is only brought over from the Catalog table one time, when the Asset is first entered into the Asset table, the system will NOT overwrite your revised information.

For instance, if the purchase cost for SE1100 is $700.00, and you have entered the $700.00 figure in on the Purchase Cost shown above. When you inventory the assets, and move them to the Asset table, your chairs will begin with a purchase cost of $700.00. But, you got a very good deal on two of them. You can change the accounting information on those two chairs to their $600.00 purchase cost, without affecting any of the other SE1100 assets.

Note: This information will not be entered onto any existing assets, only assets entered after this accounting information.

Depreciation Initialization

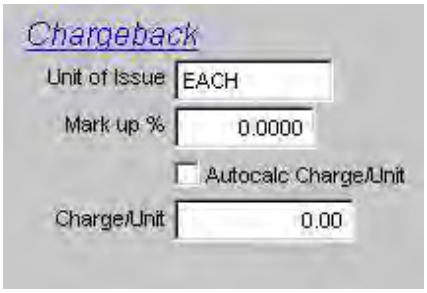
You can initialize Depreciation by entering default depreciation information here.



When a new asset is entered, it will contain the depreciation information which is displayed here. This information can later be revised by you. If you need to change the depreciation information for an asset after this information is placed in the asset table, you can enter new information and save your changes. Because the information is only brought over from the Catalog table one time, when the Asset is first entered into the Asset table, the system will NOT overwrite your revised information.

Chargeback

The accounting items that appear on the right side of this panel are used to calculate a price that may be charged to the customer. You may not need this feature, but it was designed for items that you order frequently for customers, where the price fluctuates. The partial panel of the accounting tab is shown below.



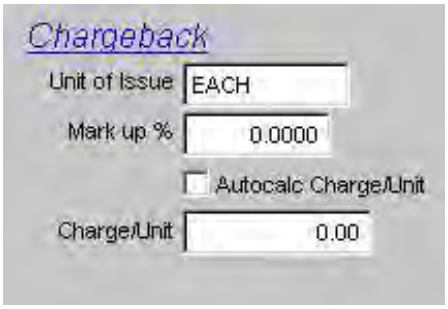
Let's say you order widgets to keep in stock for customers. When you order them, you enter the price you paid for the them, on the Transaction table.

When you open the Catalog table, a new item will appear between the Panel and Help Features on the Main Menu as shown below.

When you select Catalog . . . ▸, Calculate New Average Price, this item uses all of the purchase costs you have entered into the Transaction table, as well as those in the Asset table (using the number of items you have in stock), to find an average cost price.

This new price will be entered as a new Purchase Cost on the left side of the Accounting tab. This new cost will be associated to any new assets that you enter into the Asset table.

You decide and enter a Mark up % in the field provided. This figure should be the amount you need to "mark up" the price you pay to receive and store the widget, and the price you will charge the customer.



Fill in the Unit of Issue describing the way the widget is sold, for example, each, by the dozen, by the gross, etc.

If you select the Autocalc Charge/Unit, the new Charge/Unit will be filled out automatically including the Mark up.

This information is not intended to be used in any of the Depreciation or Accounting areas, but only displayed for you as the price that you can use as a departmental charge back or that you can use for your customer if you are selling your assets.

In summary, the Charge per unit' exists in only two places: the Catalog and Work Order Line Items. It is meant to be the amount that a customer is charged for an item when the item is moved from your inventory into the customers possession. It contains a 'mark up' that the vendor charges the customer. It is not involved in Moves from the Transaction to the Asset tables and is not involved in any other part of Bar|Scan.

More on the Chargeback feature

The calculated average for a new Purchase Cost in the Catalog is determined based on the following rules:

✓ All Location History entries with a room tag listed for exclusion in the Company settings screen are excluded from averaging.

✓ All Location History entries with a Quantity less than one (1) are excluded from averaging, as inventory withdrawals are not included in a 'Cost'.

✓ All Location History entries that belong to an asset with a total quantity less than one (1) are excluded from averaging as this asset is on back order (whether or not some of the Location History quantities themselves are positive).

✓ A Zero value in the Location History Cost per Unit field means that it uses the default Catalog Purchase Cost. Therefore when doing the averaging calculation all Location History items with a Cost per Unit of zero are calculated as if they have a Cost per Unit equal to the Catalog Purchase Cost. For example, if there are four location history entries with Costs per Unit of 0,2,0,4 and the Catalog Purchase Cost is 3, then this would be the equivalent of 3,2,3,4 in the averaging calculation.

No change will be made if:

✓ The catalog is not being used in the Asset table.

✓ The resulting average is the same as the current Catalog Purchase Cost.

The averaging works for all assets, including 'Z' assets, as long as the monetary amounts entered in the 'Cost per Unit' field of the Location History is actually a cost per unit and the Catalog Purchase Cost is also a cost per unit number.

The ‘Cost per Unit’ is what is paid for an item on a unit basis. It is generally entered into the Transaction table as what is paid for an item when received so that the value goes with a Location History entry once sent to the Asset table. If the amount paid is the default Catalog Purchase Cost then the Transaction entry should have a ‘zero’ value for ‘Cost per Unit’ indicating that the default Catalog Purchase Cost is being used.

The Transaction ‘Cost per Unit’ is not initialized with the value currently held in the Catalog Purchase Cost. However, if the Cost per Unit is different from the Catalog Purchase Cost then it needs to be hand entered so that it will be tracked accurately. From a practical standpoint this generally means that customers either always use the Catalog Purchase cost or always enter a Cost per Unit for each Transaction.

From time to time the operator will be instructed to adjust the amount charged to customers who consume the item. This is the ‘Charge per Unit’ listed in the Catalog and is either hand entered or automatically calculated FROM THE CATALOG PURCHASE COST. This ‘Charge per Unit’ is the value that is then entered into the Work Order line item Charge per Unit. The Catalog Purchase Cost value comes either from a hand entry or an averaging calculation as described above.

When doing reports that use Cost per Unit fields the Report Generator must know how these fields are being used in the company. If the costs per unit are always being entered into each Transaction and then moved up to the Location History then use these fields when listing costs per unit and doing calculations with them in reports. If Costs per Unit are not individually tracked in the Location History but are only being entered into the Catalog as a Purchase Cost, then use that field when doing reports. However, if a customer wants to ‘mix and match’ Catalog Purchase Cost and Location History Cost per Unit values then the customer must use the Location History Cost per Unit field with an adjusted expression that takes the Catalog Purchase Cost when the Location History Cost per Unit is zero. To do this change the Location History ‘Cost Per Unit’ ‘Expression’ entry (under Properties) from: O_CPERU’
To: IIF(LH.O_CPERU=0,CA. PL_COST,LH.O_CPERU)

Be sure that at least one Catalog field exists in the report or they will get an error when attempting to print.

Components Tab

Bar|Scan has a set of features are available to allow you to create, modify and move groups of assets by selecting them using both a Catalog Component List or an Asset Bill of Materials (BOM) List.

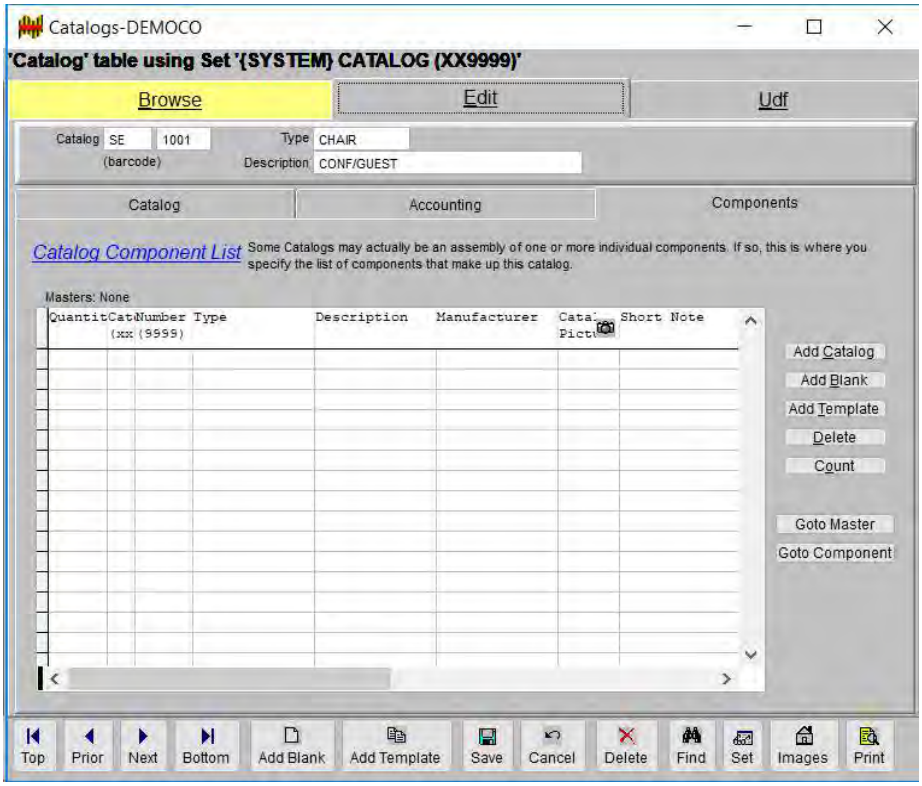
With these new features, you can move these groups as a whole, perform work on these groups by means of a Work Order, reserve the components of these groups by means of a Reserved Bill Of Material so that they will not be available for use to build other groups or be moved to other locations.

You can also create Bar|Scan reports detailing these special catalogs, assets, and components and their relationship.

Catalog Components, Asset Bill of Materials, Reserved Bill Of Materials and Reporting are all discussed in more detail in the following sections.

This is the Catalog Component List. There are many columns of information displayed on this tab. You can move these columns so that they are arranged in any order that best suits your requirements. Once these columns are moved, their placement is retained until you choose to move them again. Since there are more columns than can normally be seen on smaller PC screens, it is best to arrange them so that the most commonly used columns appear towards the left. Feel free to navigate to the right side to examine all of the columns.

When you choose the Edit Tab of the Catalog, you will see a Tab called ‘Components’. If you have not yet added any components, you will be presented with a screen similar to the following.



There are also several buttons on the right side such as ‘Add Catalog’. The most important one is the ‘Count’ Button which is explained below.

Count

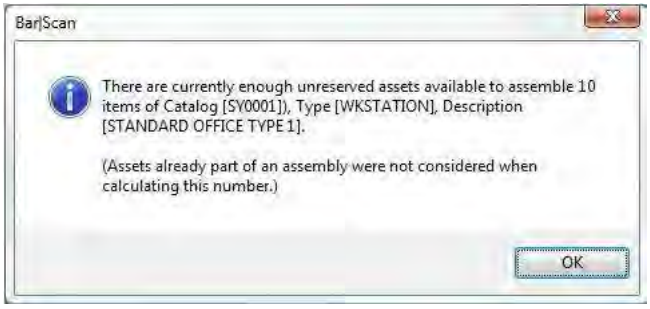
Even though we are on the Catalog Screen, the Count Button can be used to determine how many Component Assets are available to build the specified Catalog.

All Assets in your Company Database are either a.) part of an existing assembly or b.) are available to be used as an assembly. If they are not part of an existing assembly, they can be used in new assemblies.

For example, if a catalog SY0001 is a Furniture Workstation and is the assembly of nine items (two Pedestals, three Overhead Storage Cabinets and five Panels) and there are 22 Pedestals, 30 Overhead Storage Cabinets and 100 Panels in inventory, you can potentially make ten (10) assemblies.

After you made ten assemblies, you would have no more Overhead Storage Cabinets left (30 Overhead Storage Cabinets divided by 3 required per Furniture Workstation = 10 total possible Workstations).

Based on the above scenario, when you pressed the Count Button, you would see a dialog box like the one below.



If now you actually do build these 10 assemblies, You will have 2 pedestals, Zero Overhead Storage Cabinets and 50 panels left over.

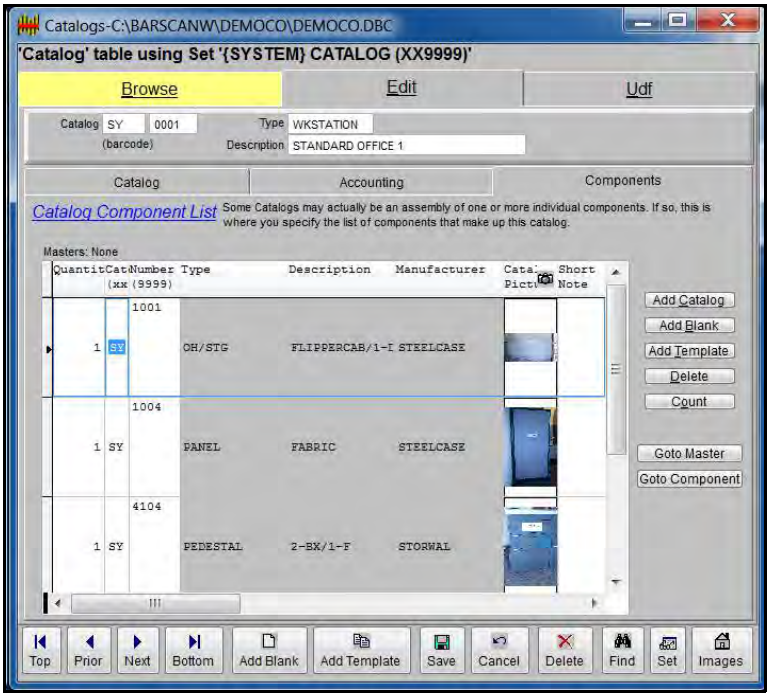
If you later get in six more Overhead Storage Cabinets Assets and add them to the Asset Table and then you were to press the count button again you would get a value of 2, i.e., “There are currently enough unreserved assets available to assemble 2 more catalog SY0001 Furniture Workstations”.

In short, when you click on the ‘Count’, it examines all of the assets and determines how many of this particular catalog can be put together using ‘unreserved’ assets. If it is already part of an assembly it can not contribute to the count.

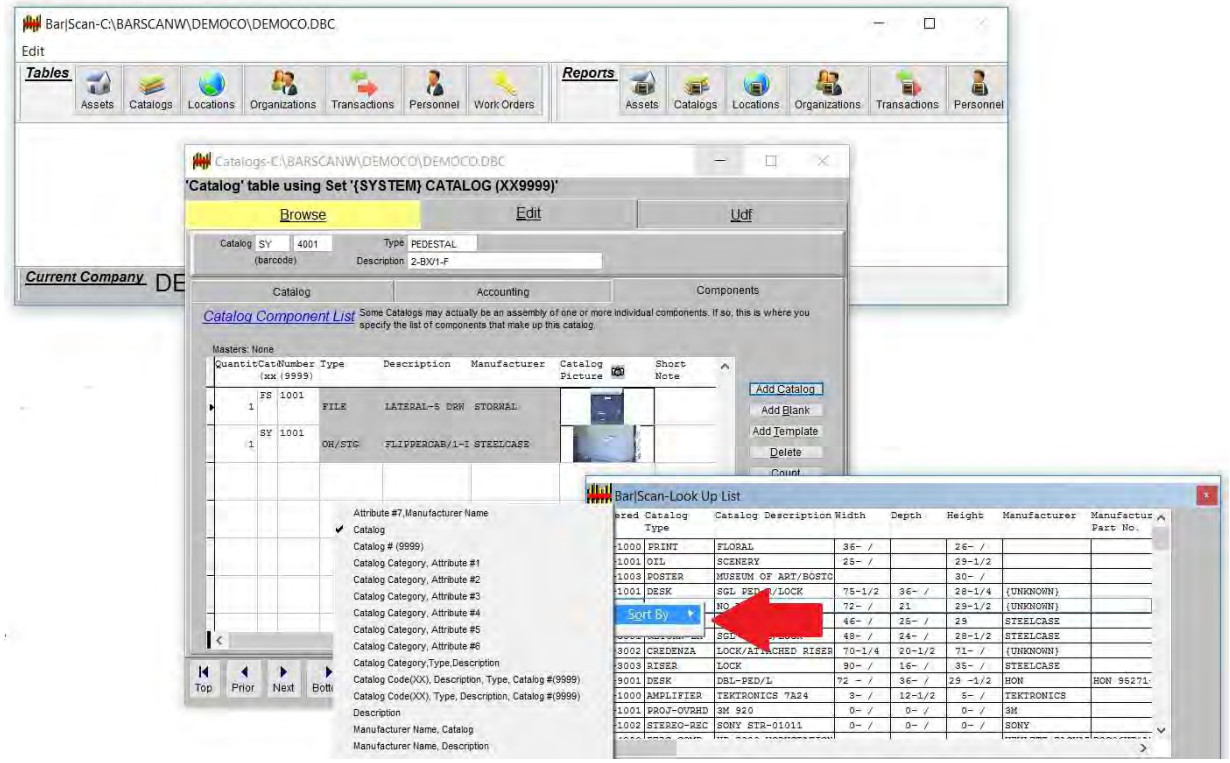
Goto Master and Goto Component

These buttons are used when a Catalog is either part of an assembly or owns an assembly. If it has components and you select the component in the list to the left then select 'Goto component', then the current asset becomes the one selected. You move to that Catalog. Likewise, if you see a master Catalog in the list of masters (see the Masters: None in the picture right above the list.) selecting the 'Move to Catalog' moves to that Catalog number. (Note that it is technically possible to have more than one master.) Using these two buttons you can navigate throughout a specific item and its components without going to the browse.

Using our example, of a catalog SY0001 Furniture Workstation and is the assembly of nine items, the completed Catalog Component List would look something like the screen below. How was it determined which Catalogs were needed to build this Workstation? Bar|Scan has no intuitive knowledge of how components are put together, therefore you must have the expertise either in furniture, computers or other types of assets to build the Catalog Component List. If you do not have this expertise, consult your Bar|Scan Administrator for guidance.

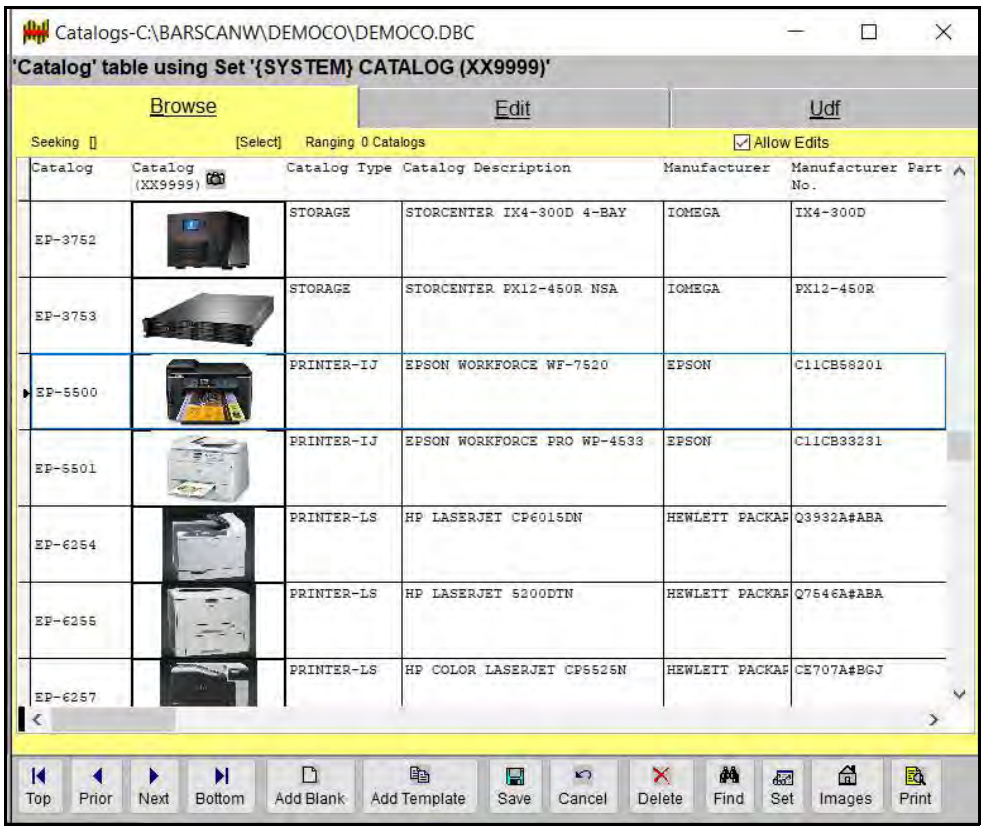


As with all Look up windows in Bar|Scan that display more than one column, you can right click and resort the information shown to improve your selection process. This is shown in the Screen below.

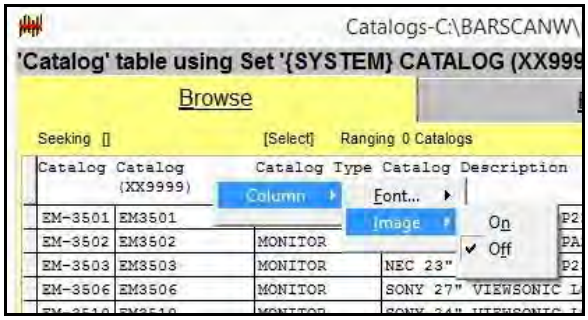


The Bar|Scan Imaging Module can be very useful when working with Furniture Components. Images can be displayed on both the Browse Tab and Edit / Components Tab. Asset Images can also be displayed on the Asset Browse Tab.

Below is an example of Catalog Images on the Browse Tab of the Catalog Table.



How are Images displayed on the Browse Tabs of Bar|Scan? You can display images on Asset and Catalog Browse Tabs by right clicking on either the Asset # header or the Catalog header as shown in the example at the left. The Asset Number or Catalog Number will be replaced with the corresponding image. If there is no image available, it will be blank.

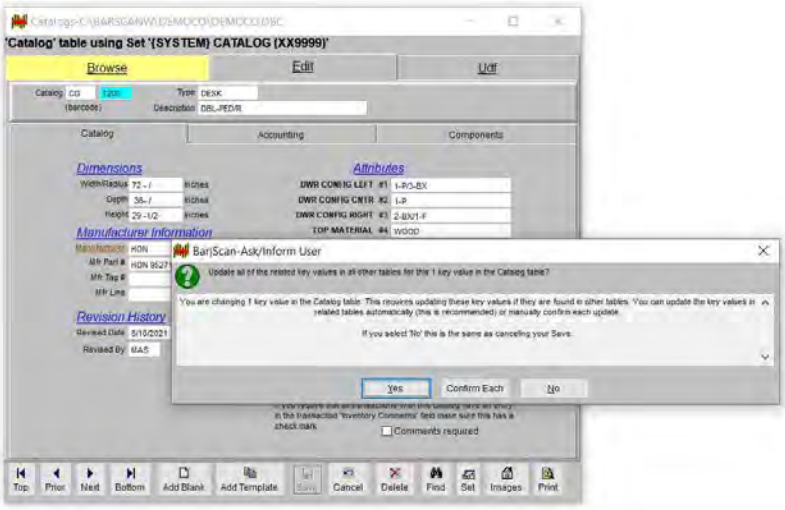


Changing Catalog Information

From time to time you will want to change, correct, or add information associated with Catalog Numbers currently existing in the Bar|Scan system.

In addition to changing the information associated with an individual Catalog Number, this feature permits you to identify a group of Catalog entries, and then make the same change to the entire group at one time.

If you are a Master User (administrator) then Bar|Scan will permit you to change a Catalog Number. When you change the number, you are prompted to permeate the change throughout the database. Typically you would reply YES to the conformation prompt. Below is an example:



Go to the Browse panel. Select the first item that you wish to change, and press the F4 (Range) key. The item will be highlighted; the default highlight color is green. Go to the last item that you wish to change, and click on it or use the arrow keys to highlight them as you go. When all of the items that you wish to change are highlighted, press the <Enter> key. Then, go to the Edit panel to make your change(s). When you press the Save button or the Ctrl + S key combination, you will be asked to confirm the change to the one Catalog that is displayed. Then you will see a message that asks if you would like to send the change(s) to all of the items in the range. If you select Yes, then all of the items will have been changed.

When you have completed and saved the changes, all assets assigned the Catalog Number being changed will immediately reflect the changes, i.e., if you changed the spelling of the Manufacturer's name, then all of the assets that are linked to the Catalogs that you have changed will immediately show the change.

Deleting a Catalog Entry

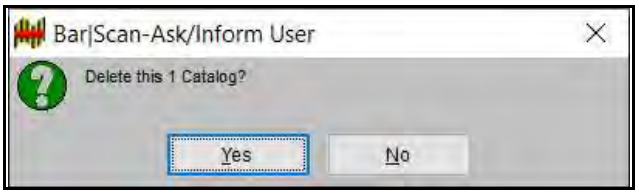
This feature completely removes Catalogs from the Bar|Scan system. Obviously, caution should be exercised when using this feature. Removing Catalog Numbers from the system is most often done due to erroneous entries.

Bar|Scan will **NOT** permit you to delete any Catalog Number currently assigned to an asset.

From time to time, you might want to delete a Catalog Number currently in use (i.e., you may have two Catalog Numbers describing the same thing). First, go to the Transaction table, change the Catalog Number on any asset that is using the number you wish to delete. Then, go to the Asset table and change the Catalog Number on the assets containing the number you wish to delete. After this is done, no assets will be using this Catalog number, and you may then delete the Catalog number.

Bar|Scan permits you to identify a single Catalog number or a group of Catalog numbers which can be removed from the system all at once. Use the F4 (Range) feature to first identify a particular Catalog number or the group of Catalog numbers that you wish to remove. Press the Enter key to end your Range.

Select the Delete Items button from the tool bar. It is pictured at the left. You will be shown a dialog box like the one below.



If you choose, Yes, you will be shown another dialog box that asks, “Really delete this 1 catalog?” If you select Yes, you will see another dialog box that says, “Delete Done.” If your response to the above dialog box is No, the dialog box disappears, and you will remain on the browse panel.

Merging Catalogs

Over time it is possible to create several different Catalogs for the same item. For example, you might have created (or imported) a Catalog EP0305 and EP4123 with the same or similar description.

While this does not affect the day to day operation of Bar|Scan, it is best to remove the duplicates. Fewer duplicates results in less data being synchronized into your Mobile Devices as well as better reporting.

There are several steps to remove or merge Catalogs. These steps are required because Bar|Scan will not allow you to delete Catalogs that are being used, nor will Bar|Scan allow you to change the Catalog Number. This is to maintain your database integrity.

Follow these steps to remove or merge Catalogs:

1. Open the Catalog Table and identify the Catalogs that you wish to remove. We recommend that you use a SET command to sort the data by type and description, model number, or any other descriptive sort that makes sense for you. Duplicates will be easily visible since they will be next to each other. Also, make sure that the Catalog Category and Catalog Number are both columns being displayed on the Browse Panel.

2. For each similar Catalog, decide which one you wish to keep and which one you wish to discard. Write down, or enter into Excel their Catalog Numbers in 2 columns titled “Keep” and “Discard”.

3. Now we want to change all the Assets using the “Discard” Catalog number to use the “Keep” Catalog Number. Open the Asset Table and use a SET Command by Catalog Number. Make sure that the Catalog Category and Catalog Number are both columns being displayed on the Browse Panel. Remember, you cannot edit the first column which is the SET Command Column.

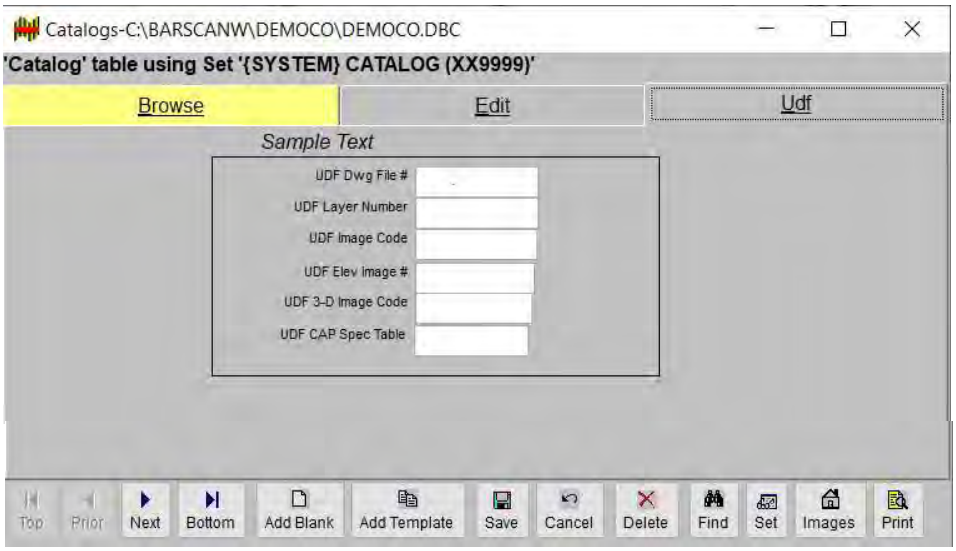
4. On the Asset Screen, find the Catalog from the “Discard” column on your notes. Use the Range Function to highlight all assets with this Catalog and change all the Catalogs to the Catalog Number on the Keep column. Do this for all Catalogs in your list.

5. Finally open the Catalog Table and delete the Catalogs from the “Discard” column.

Optional: If you want to delete ALL Catalogs not being used, you can range all of your Catalogs and press Delete. Only Catalogs not being used will be deleted. Be careful about performing this function since you might want to have some of these Catalogs for future assets.

THE THIRD TAB - UDF

The third tab of the Catalog table is for the User Definable Fields, and will be accessible only if you purchased the optional User Definable Fields as part of your system, and have entered at least one UDF.

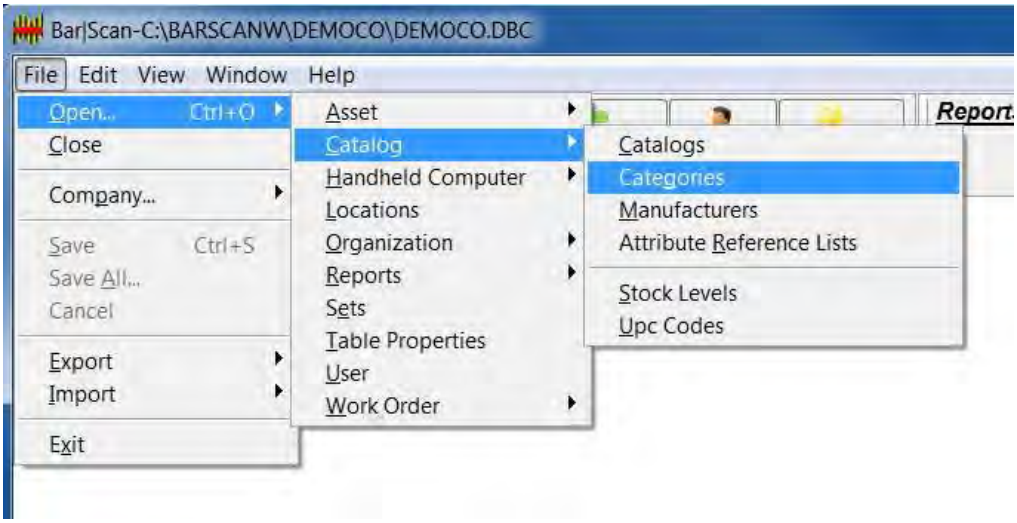


If you have the UDF module, but have not yet created any UDFs in the Catalog table, then this tab will not show up. If you want to access the UDF tab, simply go to the Main Menu while you have the Catalog table open, and select Panel, then, select Design Mode-User Defined Fields. The tab will then appear, and you will be using the Design Mode, ready to create your first UDF.

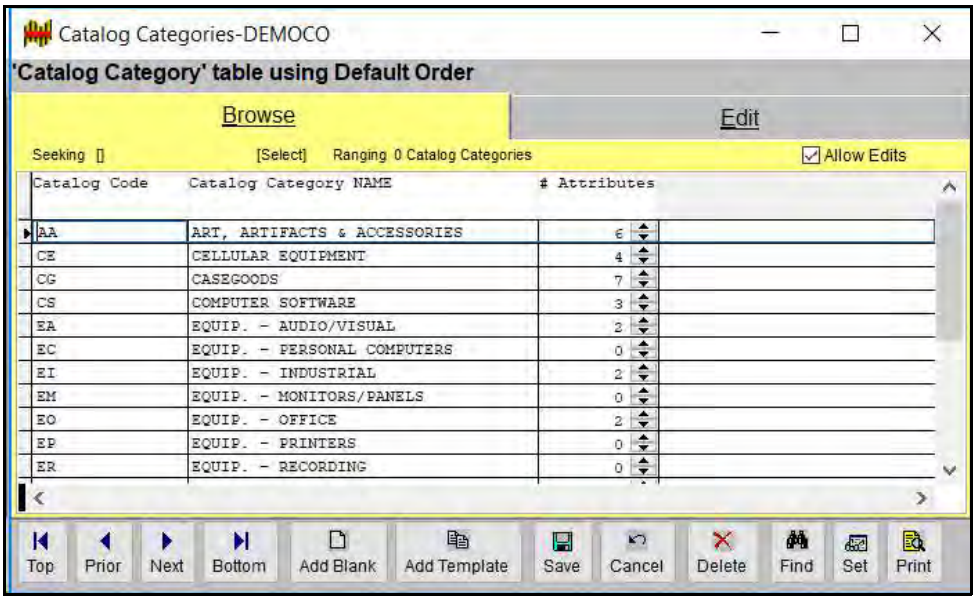
Please refer to Chapter 16 of this User Manual, *User Defined Fields*, for more information on creating UDFs and using this feature.

CATALOG CATEGORIES

From the Main Menu, select File, then Open . . . ▸, then *Catalog* . . . ▸, then Categories, as shown on the following example.



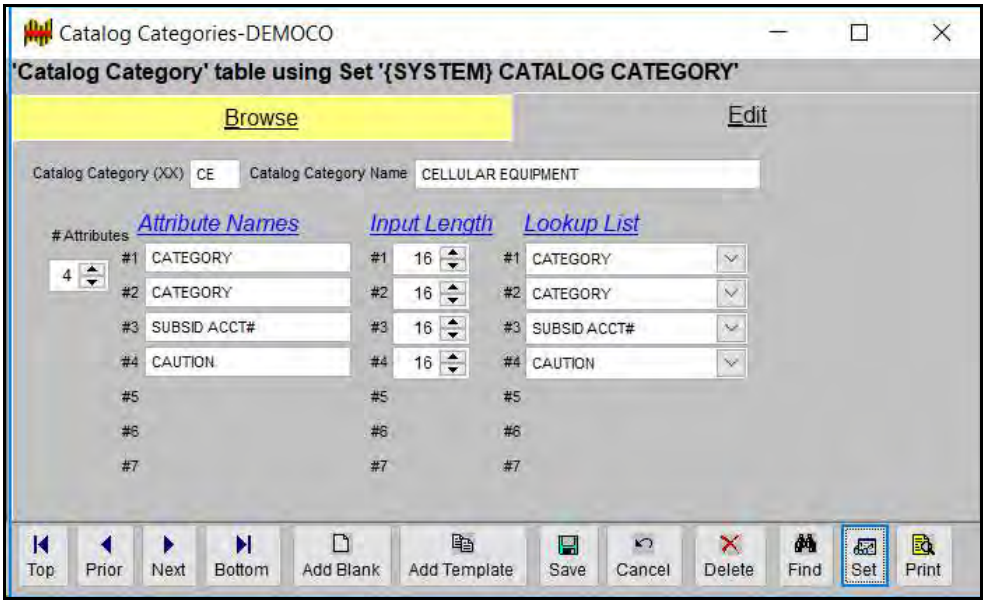
You will see the Categories table, similar to the one shown below.



To select a Category, either type the first letter, or move the highlight bar to the item and press ENTER. Then, select the Edit panel to add, change, or view the details that were, and can be entered for a Catalog Category.

In addition to adding a Category, you also use the Category table to define how many attributes appear, and how many characters an attribute will hold.

This screen permits entry of a new Category, the Category name, and up to seven Attributes.



You can decide how many attributes to associate with a Category, up to seven. You decide the name for the attribute, and the length of the attribute, as well as the name of the look up list.

You may also make changes to existing Categories on this screen.

It can be a very valuable tool to have the ability to create additional Categories. However, care should be taken to ensure that there is a simplicity to the Categories involved, so that there is not more than one Category available for a particular type of asset.

Attribute Length

When filling out your attributes in the Catalog table, you may notice that you are not able to print as many characters as you would like. Twenty (20) is the maximum number of characters available for any attribute, but the default length may be smaller. You may make the Attribute fields appear wider, up to twenty characters wide, by accessing the Category that you are working on.

Simply select the Category that you would like, and then select the Edit tab.

For instance, if you wanted to change the length of the attributes on the AA (Arts, Artifacts, & Accessories) Category, you would select the AA Category on the Browse panel, and then select the Edit tab.

Attribute number one, is for the Artist. The Input Length is set at 16. Simply use the arrows next to the 16 to enlarge this field, or make it smaller, depending on your needs.

In order to get as much information on an asset report as possible, Bar|Scan will print all twenty characters on a report, but they may automatically wrap to the next line if the column width does not allow for the field to print all twenty characters. You may however, widen the columns on a report in order to view the entire field.

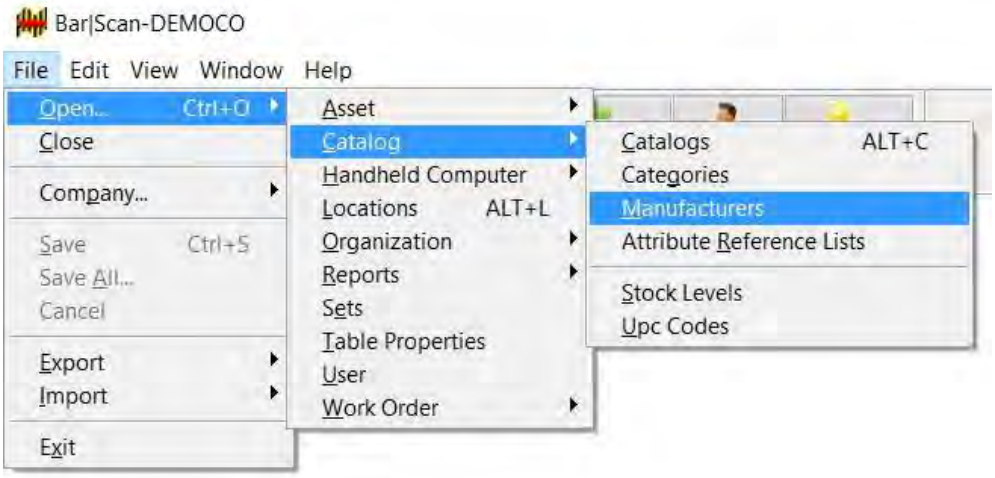
For more information on adjusting the width on the columns of a report, please see *Chapter 10 - Reports*.

Hint: Contact your Bar|Scan Dealer if you must print more attribute information than Bar|Scan has in it by default. Perhaps, you may require a UDF - User Definable Field.

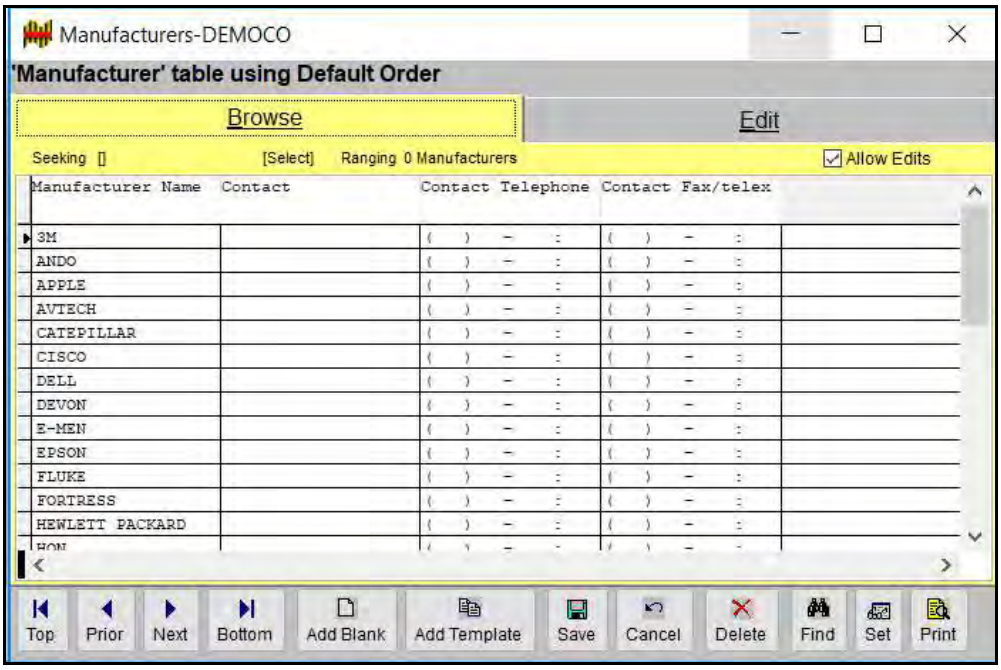
MANUFACTURERS

You will want to identify the manufacturers of the different types of assets in your company. In addition to the name of the manufacturer, Bar|Scan provides space to enter other information about the manufacturer. Occasionally, you will want to identify the name of a vendor rather than the manufacturer, e.g., you might purchase an item which has been assembled from products supplied by several manufacturers.

From the Main Menu, select File, then Open . . . ▸, then *Catalog* . . . ▸, then Manufacturers, as shown on the following example.

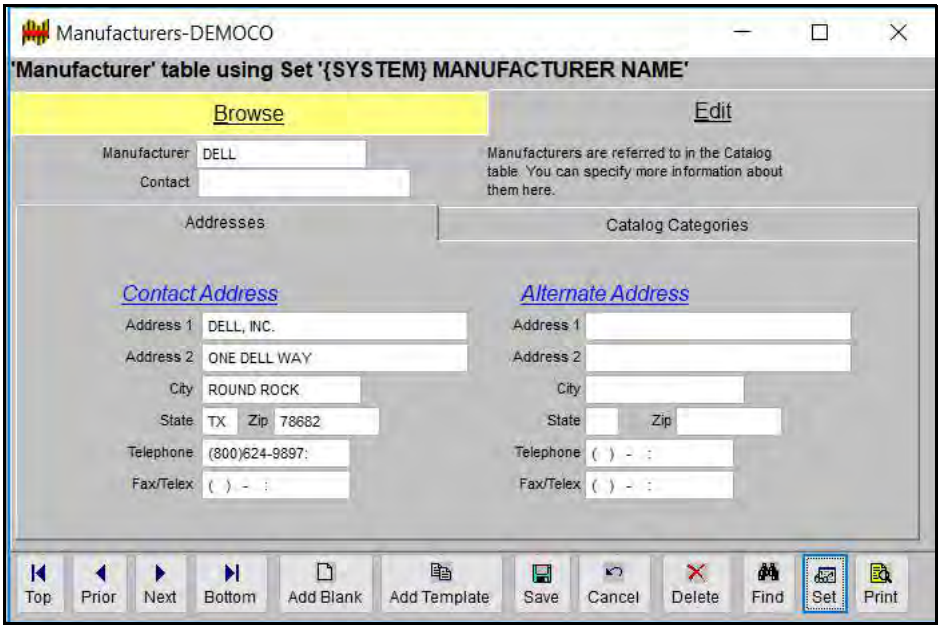


You will see the Manufacturer's table, similar to the one shown below.



When you want to Add, Change, or View the details for any of these Manufacturers, select that Manufacturer, and then select the Edit tab.

To select a Manufacturer, either type the first letter, or move the highlight bar to the item and press ENTER. Then, select the Edit panel to add, change, or view the details that were, and can be entered for that Manufacturer.



The selected Manufacturer entry will be displayed.

You may press the PgDn key, or the Next Item button to view the next Manufacturer from the selection list. The PgUp key or the Prior Item button will display the previous Manufacturer. Ctrl + Home key combination or the First Item button will display the first Manufacturer on the selection list, and the Ctrl + End key combination or the Last Item button will display the last.

You may use any of the following buttons: Add Blank, Add Template, Save Selected Items, and the Cancel Changes on the Edit tab.

Press the ESC key to return to the Main Menu. Note if you have pending additions or changes, you will be shown a dialog box that asks you to save or cancel these additions or changes before you are allowed to exit this panel.

Entering a New Manufacturer

Add Blank Item, or Add Template Item both permit you to enter a new manufacturer into the Bar|Scan system. To select the Add Blank Item or Add Template Item, simply click on their respective buttons on the tool bar.

If you choose Add Blank, a blank manufacturer display screen will appear. If you choose Add Template, you will be using the manufacturer that your cursor was on for a template.

Press Esc to return to the Main Menu without selecting a manufacturer. Note: If you have pending additions or changes, you will see a dialog box asking you to save or cancel the pending additions or changes before you will be allowed to exit this table.

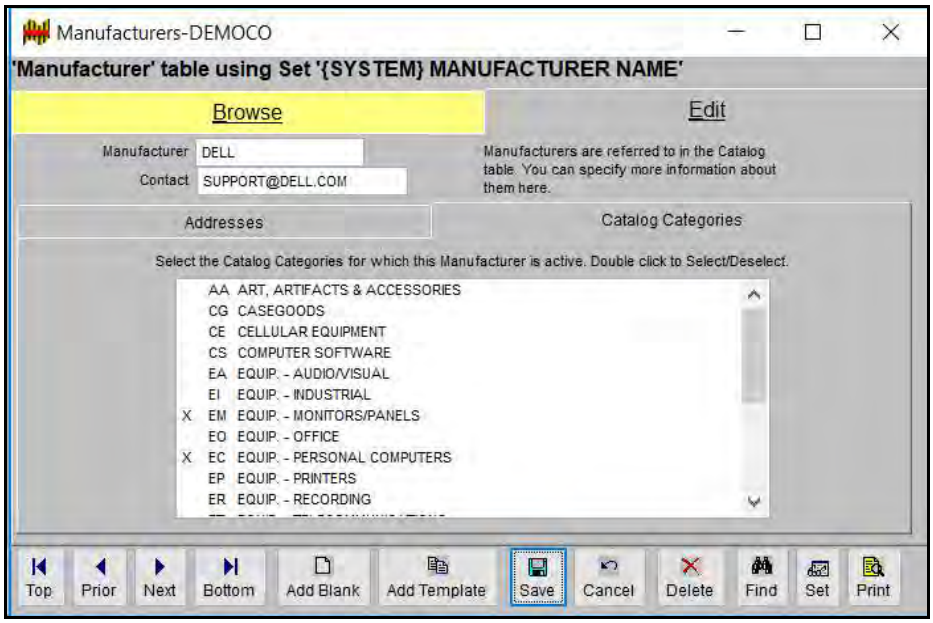
The Edit tab is divided into two sections, Addresses, and Catalog Categories. The left section, Addresses, permits you to enter the vendor or manufacturer's name, contact, the address, the telephone, and the fax number. The right side of the Addresses tab has fields for alternate address information. The Catalog Categories tab will allow you to determine which categories the manufacturer shows up for when you select the Look up Value.

All of the information for the Manufacturer’s table is very unique. But, all of the items on this screen have look up windows available which may be especially useful to find any duplicate entries.

The information other than the Manufacturer’s name is optional, but may be entered for information purposes.

Use the arrow keys, the Tab key, the Enter key, or your mouse to move to the different fields of the screen and type in the new information.

Simply type in the new information, and then select the Catalog Categories tab as shown below.



On this panel you can decide which Catalog Categories the Manufacturer will display for. Double click to Select/Deselect a Category.

Save the information you have entered by clicking the Save button on the tool bar or by pressing the Ctrl + S key combination.

Changing Manufacturer Information

From time to time you will want to change, correct, or add information associated with manufacturers currently existing in the Bar|Scan system.

In addition to changing the information associated with an individual manufacturer, this feature permits you to identify a group of manufacturers and then make the same change to the entire group at one time when using the F4 Range feature.

From the Manufacturer's browse tab, choose a manufacturer and press enter. Then, select the Edit tab. The manufacturer you selected will then be displayed.

If you intend to change a group of manufacturers, use the **F4** (Range) feature to select the group.

You may now change the information listed for this manufacturer. After you have made your changes, press the **Ctrl + S** key combination or the Save button to save the changed information. If you have selected a group, Bar|Scan will ask you if you want to send the changes to all of the Manufacturer's that you have ranged, and if you say Yes, it tell you how that these manufacturers were changed.

Removing a Manufacturer

This feature completely removes manufacturers from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

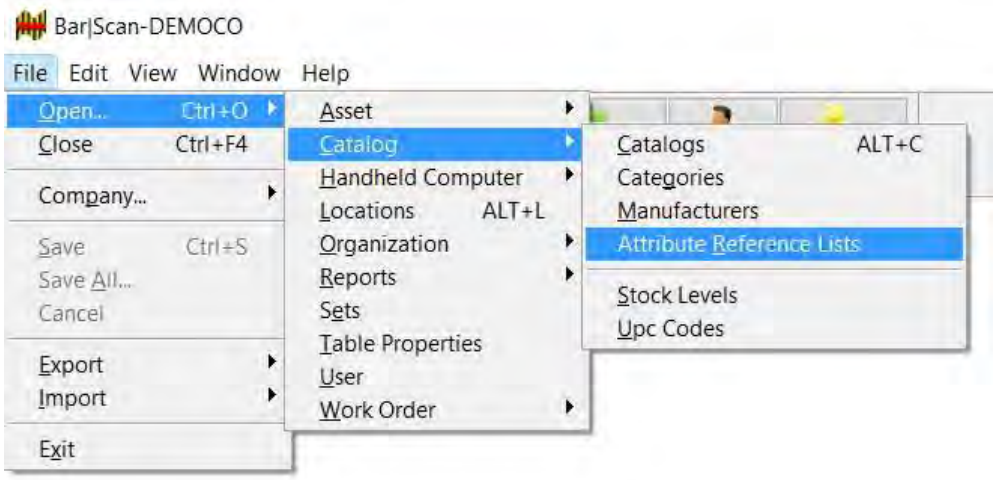
Removing manufacturers from the system is most often done due to erroneous entries.

Bar|Scan permits you to identify a group of manufacturers which can be removed from the system all at once. If you intend to delete a single manufacturer or a group of Manufacturers, use the F4 (Range) feature to first identify and select the particular manufacturer(s) you wish to remove.

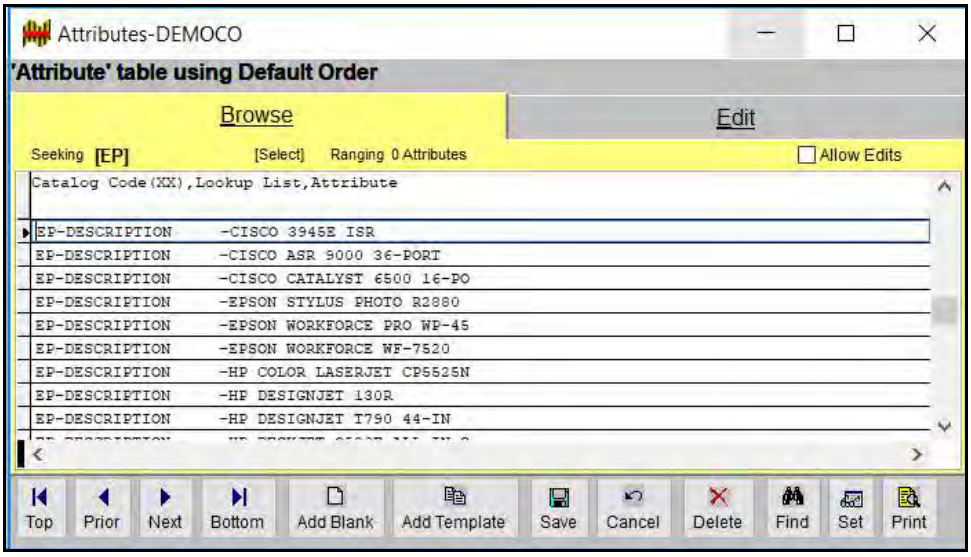
To delete the selected manufacturer(s) once ranged, simply click on the Delete button on the tool bar. You will see a dialog box asking you to confirm the deletion.

THE ATTRIBUTE REFERENCE LIST TABLE

From time to time, you may wish to change or delete erroneous entries to your attribute list. To do this, you need to open the Attribute table. From the Main Menu, select File, then Open . . . ▸, then *Catalog* . . . ▸, then Attribute Reference Lists as shown below.



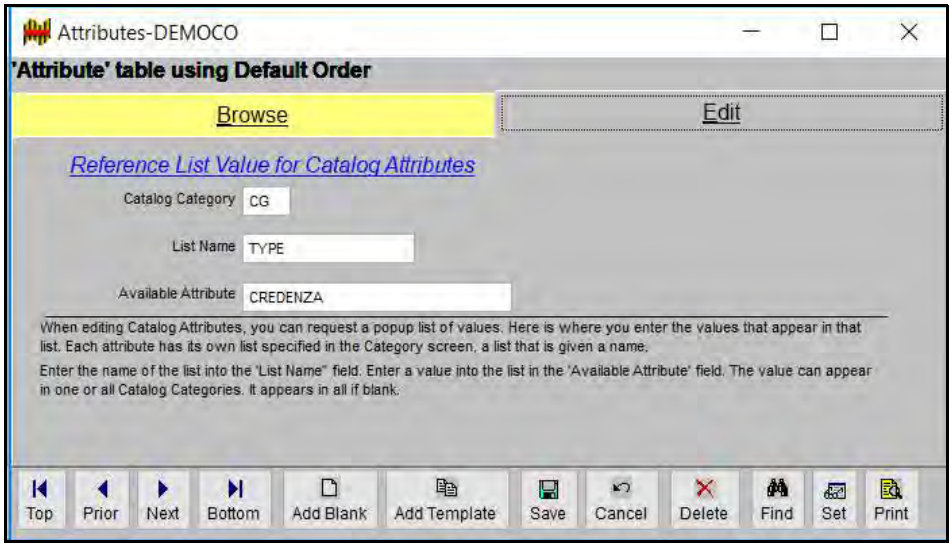
You will see the following Attributes Reference table.



This table holds all of the information that you would see when you use the Look up Value for a Catalog Type, Description, or Attribute. Some of the items such as color are shared, and therefore do not list a Catalog Code. If you need to add a color that is specifically for only one Category, you can add it, and specify the Category you wish to have it used on.

You may view or delete items on this Browse panel, or you may select one of the attributes, and choose the Edit panel. On the Edit panel, you may add, change, or view an attribute.

When you choose the Edit panel, you will see a panel similar to the one below.



Make your new attributes available for only one Category by specifying a Category, or to all Categories by leaving the Category field blank. On the example shown, the Credenza will be a Catalog Type for the CG-Case Goods Category.

Deleting an Attribute

When you delete an attribute, it is removed from the selection lists. It will NOT be deleted from use in any Catalog.

To remove an attribute from the selection list, simply select the attribute on the Browse panel, and highlight it using the Range feature. Then, select the Red X (delete button) from the tool bar. A dialog box will appear to ask you to confirm the deletion.

If you respond Yes, you will see a dialog box telling you that the deletion is complete.

Hint: For removing many items from the look up windows automatically, See *Rebuild Catalog Attributes* in *Chapter 13 - Housekeeping.*

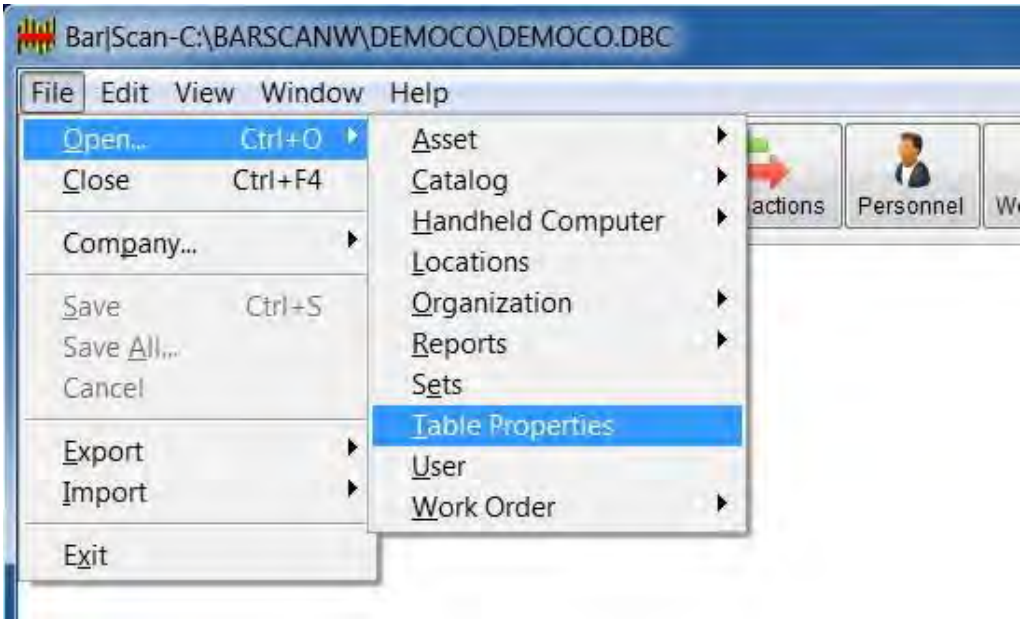
SHARING CATALOGS

The Multiple Company Option allows Bar|Scan to maintain a separate Catalog; or any other table for each Company that you create. You have the ability to import Catalogs from one company to another.

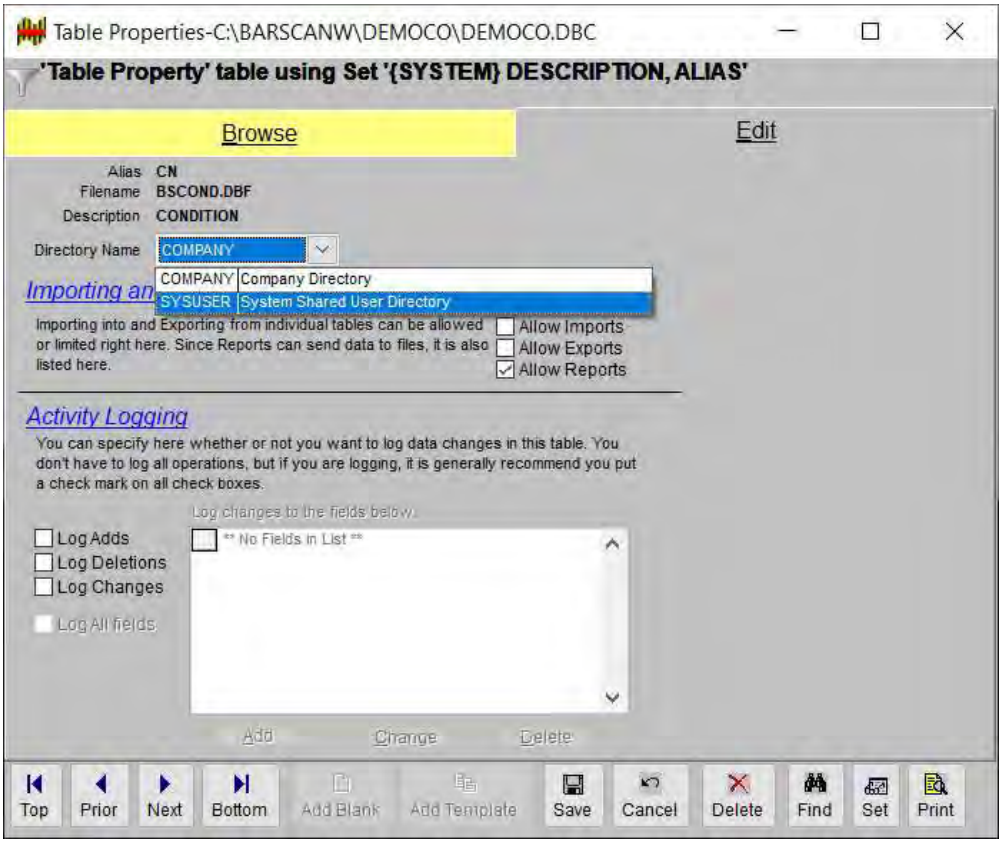
Because of the import capability, you can develop separate Catalog tables for each line of furniture or type of equipment.

Alternatively, you can create a master Catalog table for all of your companies (or projects). Under this scenario, Catalogs are only ADDED to the master Catalog table.

To do this, select File, then Open . . . ▸, Table Properties as shown below.



When the Table Properties browse box appears, choose Catalog, then select the Edit tab which is shown below.



Next to the Directory Name, there is a field with a down arrow. Click on the down arrow, and change your selection from Company to Sysuser, and Save your selection.

Perform the same steps on the tables needed to support the Catalog Table. These are: Catalog Category, Catalog Component and Reference List Tables.

The Catalogs for this Company will now be shared by any other company that also has this setting.

You **must now close Bar|Scan** completely, and **reopen it.** Check that you still have the company that you want to share the list from open, and select to do a **Restructure** to finalize the change. Go to the Main Menu, select File . . . ▸, Company . . . ▸, Housekeeping . . . ▸, Table Integrity. Select the Company(s) you have changed, check Restructure, then click on the Ok button.

To implement this scheme for additional companies, when adding a new company to Bar|Scan, perform the change to the Table Properties to reflect the Sysuser as the directory for the Catalogs prior to working with the Catalogs.

It is also advisable to share the Catalog support tables including Catalog Category and Manufacturer.

Importing a Catalog

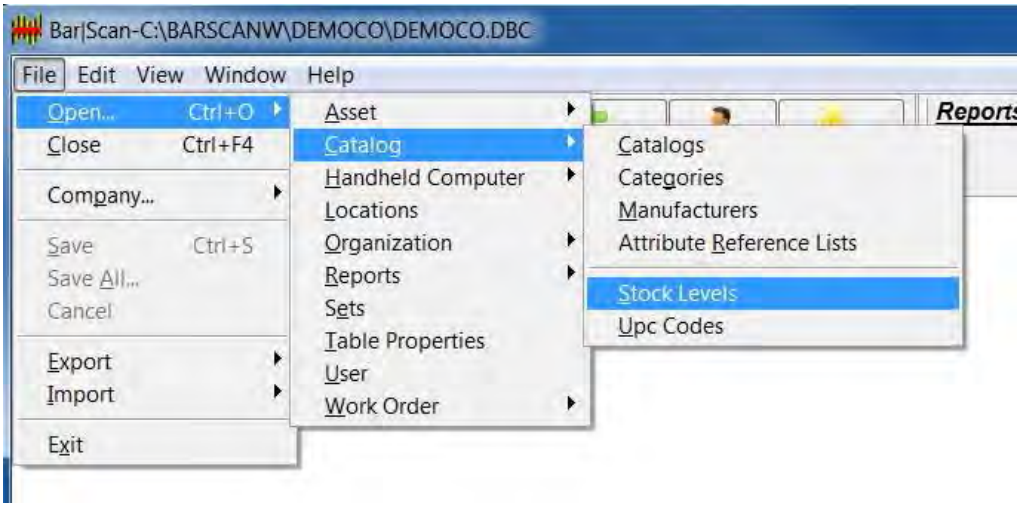
If you are not sharing a Catalog table between companies, you can Import a Catalog from another Bar|Scan database if you have the Import/Export module. Then, only those Catalogs which do not already exist need to be created for any new company.

It is important that the numbers used to create Catalogs differ from previously created Catalogs. While Bar|Scan has the ability to change the Catalog Number, any photographs you have taken of Catalog items probably contain the Catalog Number. Obviously, it would be difficult to change these numbers.

For more information on how to import Catalogs, see *Chapter 14, Import and Export* in this User Manual.

STOCK LEVEL

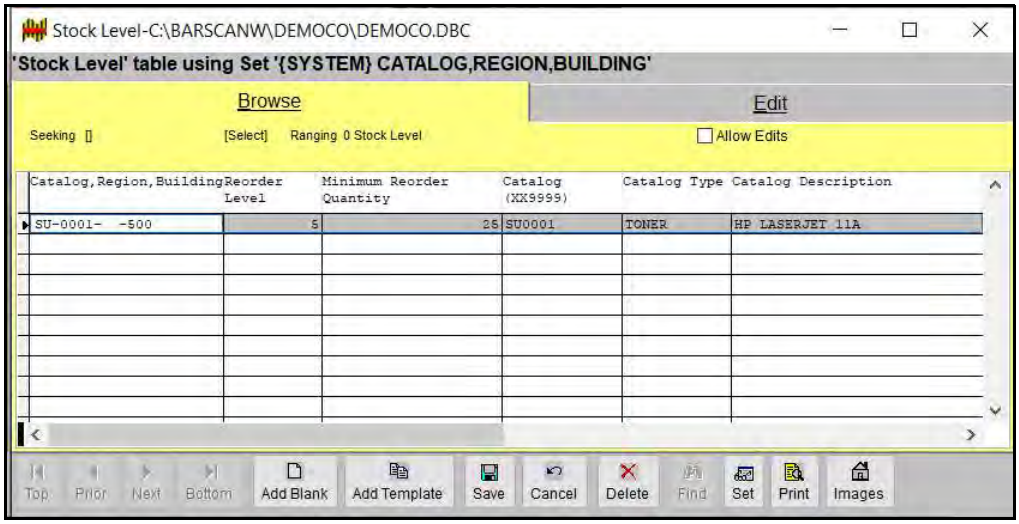
When you want to view, change, add, or delete Stock Levels you will need to open the Stock Levels table. From the Bar|Scan Main Menu, select File, then Open . . . ▸, then Catalog . . . ▸, then Stock Levels as shown on the following example.



The Stock Level table is useful for creating Asset Reports that show items that below a pre-determined reorder level.

Additionally, if you have the Work Order Module, you can let Bar|Scan automatically create a Work Order for you to bring your items above the reorder level.

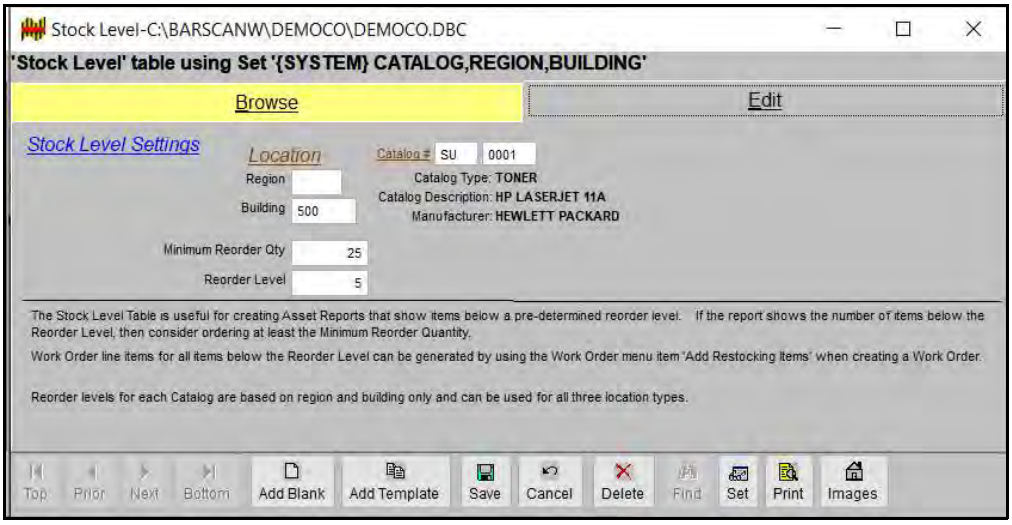
When you open the Stock Level you will see the browse table that will look similar to the one below.



When you first select this table, there will not be any data in it. You will have to begin adding data by selecting the Add Blank icon, and adding the first item to the Edit panel. After you have added at least one item, you can use it as a template for your next item.

As you can see, you can maintain a reorder level for each Region, Building, Catalog Number combination.

When you click on the Edit tab you will see a panel that will look similar to the one below.



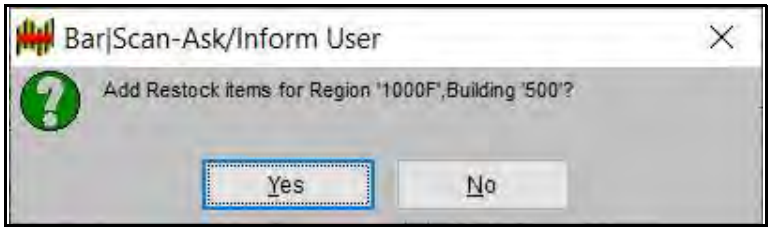
Enter the minimum reorder quantity and reorder level for every Location and Catalog combination that you would like to track. Typically, the stock level feature is most useful when working with asset quantities and not with individually tagged assets (where asset quantity always equals one).

Once you have added one stock level, you may use it as a template to add any others.

Here is how you can use the Stock Level table to automatically create a Work Order for you to bring your items above the reorder level. When you open the Work Oder table you will see the following Feature appear on your Main Menu.

You can select “Add Restocking Items” from the pull down when you wish to have Bar|Scan add line items to the currently open Work Order. The amount of line items added will be based upon the Stock Level screen.

When you select the Add Restocking Items, a dialog box similar to the following will appear.



The dialog will vary depending on which Work Order you have open when you select this item.

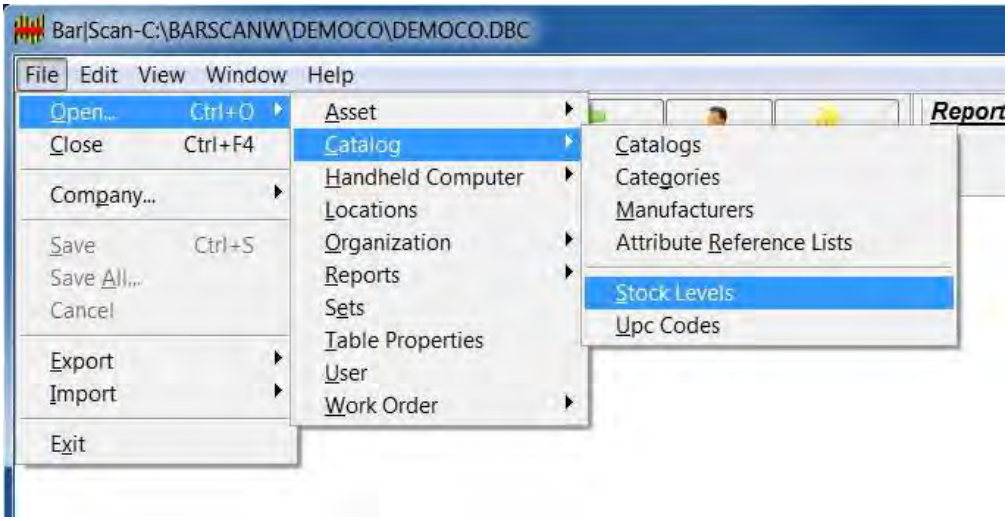
As mentioned before, this can be especially useful when you are tracking asset quantities (or as we call them, “Z” numbers).

It can also be used when you are individually tagging assets. The only difference is that with individually tagged items, more lines are created on your Work Orders, one line per asset.

UPC CODES

Universal Product Codes (UPC or newer UCC-12) are generally not used in traditional asset systems. They are widely used in retail sales environments. UPC codes are usually only associated with tracking asset quantities. For a background on UPC we recommend that you contact GS1 US at http://www.gs1us.org/

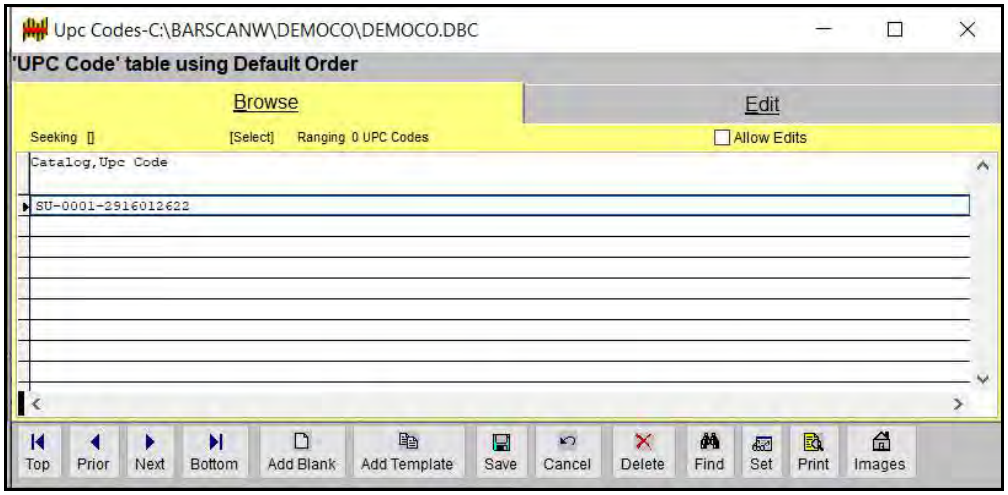
When you want to view, change, add, or delete UPC Codes you will need to open the UPC Codes table. From the Bar|Scan Main Menu, select File, then Open . . . ▸, then Catalog . . . ▸, then UPC Codes as shown on the following example.



The UPC Code table is designed to work in conjunction with the Mobile Device as a substitute for the Catalog Number. This is most useful when in Quantity Inventory Mode as in the case for inventory consumables or supplies. As with the Stock Level table, this can be useful when you are tracking asset quantities or as we call them "Z" numbers.

The UPC Code table is also designed to work in conjunction with the Work Order module to assist with non-inventory items by allowing you to scan a Uniform Product Code "UPC" instead of a Catalog Number to identify an item.

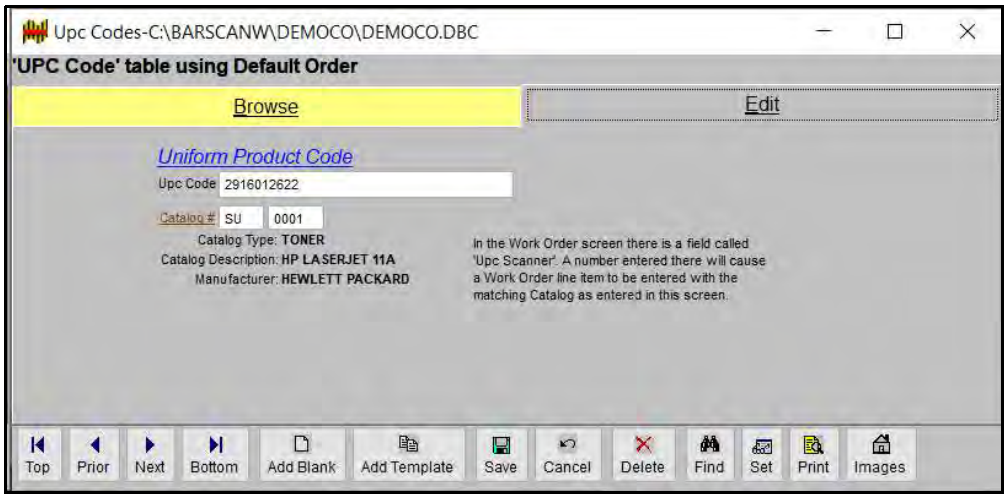
You will see the UPC Codes table open, and a browse panel similar to the one below.



As you can see, you can maintain one UPC Code for each Catalog that you enter.

When you first select the UPC Codes table, there will be no information in it. You will have to select the Add Blank icon to add your first item. Once you have saved at least one UPC Code item, you may use it as a template for all of your other additions.

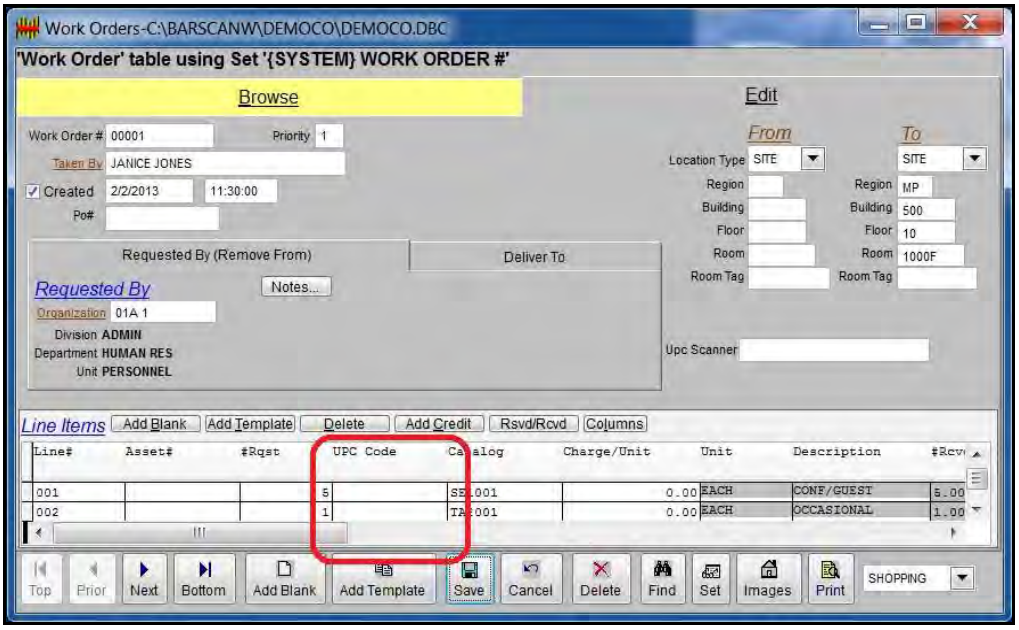
When you click on the Edit tab, you will be shown a panel similar to the one below.



You can enter a UPC Code by either typing the code directly from the item or, optionally scanning the information in with a wedge bar code scanner.

Note: In order for the UPC Code information to appear in this field, you have to have your cursor on this field when you scan the bar code.

On the Shopping portion of the Work Order Screen, scanning a UPC Code with a wedge scanner will fill in the appropriate Catalog Number for you.



Obviously, the UPC Code feature is designed to be used in a retail like environment.

However, it is a very flexible feature. We suggest that you consult with your Bar|Scan dealer for more information on this feature should you feel that this may be part of your Asset Management requirements.

CATALOG DEVELOPMENT GUIDELINES

CG-CASEGOODS

Casegoods is a term used to describe desks and their returns, table desks, and credenzas.

Beware! Sometimes systems (modular) furniture components are used to create desks and credenzas in private offices -- in these cases we catalog the components under the Systems Furniture category - SY.

Desk, Sgl Ped R

Desk, Table Desk

Desk, Dbl Ped

Desk, Sgl Ped-R Return-R

Desk, Dbl Ped

Armoire

Credenza

Desk, Sgl Ped-R Return-L

TYPE	DESCRIPTION
DESK	A rectangular or oblong table or case especially adapted for writing or studying. Usually 28" or deeper (less than 28", may be a credenza). *NOTE! Systems Furniture may have Desk Shells -- these are not Casegoods, they are Systems Furniture (see discussion under Systems Furniture, Desk on page 31)*
	Pedestal: A case containing 2 or more drawers.
SGL PED-R/LOCK	Single Pedestal. Only one pedestal on the right hand side. May or may not have an attached return (returns are usually cataloged separately). Indicate whether it is locking or not (e.g. SGL PED-R/NO LOCK)

SGL PED-L/NO LOCK	Single Pedestal. Only one pedestal on the left hand side. May or may not have an attached return (returns are usually cataloged separately). Indicate whether it is locking or not (e.g. SGL PED-L/LOCK)
DBL PED/LOCK	Double Pedestal. Two pedestals (one on each side of desk). Indicate whether it is locking or not (e.g. DBL PED/NO LOCK)
TABLE DESK	Table Desk. No pedestals, usually has a pencil drawer.

RETURN-LH Left Hand Return. A worksurface attached to the side of a single pedestal desk, usually has its own legs or an end panel, may or may not have its own pedestal. RETURN-LH Left Hand Return. When sitting at the desk facing forward, the return is attached to the left side of the desk. (Pedestal, if any, is on left as well)

RETURN-RH Right Hand Return. **When sitting at the desk facing forward**, the return is attached to the right side of the desk. (Pedestal, if any, is on right as well)

SGL PED-R/LOCK	Single Pedestal. Only one pedestal on the right hand side. Indicate whether it is locking or not (e.g. SGL PED-R/NO LOCK)
SGL PED-L/NO LOCK	Single Pedestal. Only one pedestal on the left hand side. Indicate whether it is locking or not (e.g. SGL PED-L/LOCK)

TYPE **DESCRIPTION (continued)**

CREDENZA A case that has a desk-like shell with pedestal or door configurations on either side as well as in the center (some have a knee hole or open space in the center). Usually less than 28" in depth (more than 28", may be a desk). May have shelving or bookcases above worksurface (if separate component -- see Riser). *NOTE! Systems Furniture may have Credenza Shells -- these are not casegoods, they are Systems Furniture (see discussion under Systems Furniture, Credenza on page 31)*

LOCK LOCK (or NO LOCK) Indicate whether credenza can be locked or not.

RISER Usually rests on top of a desk or credenza containing open or closed shelves. (look for seams between desk/credenza top and riser -- if there are no seams do not catalog separate.

ATTRIBUTES

Left, Center and Right Drawer/Pedestal Configurations

1-BX/1-F
2-BX
2-F
1-P/1-BX/1-F
2-DR
2-SLD

Note: dash connects number of drawers with type of drawer, diagonal (/) separates types of drawers.

P Pencil Drawer. Usually a shallow (2-4" high) center drawer (sometimes combined as the top drawer of the pedestal).

BX Box Drawer. Usually 5"-7" high, used to store miscellaneous office supplies.

ATTRIBUTES (continued)

F	File Drawer. Over 9" high, made to store files vertically but may contain other office supplies.
DR	Door. Door hinged on one side.
SLD	Sliding Doors. Sliding panel or door fitted into tracks.
OPEN	Open. No drawer is present.

Top or Base Material

LAMINATE	Plastic laminate is a thin layer of plastic which may appear to look like wood, a solid color, or textured.
WOOD	Wood or wood veneer.
METAL	Painted or unpainted metal.

Top or Base Finish/Color

COLOR/ FINISH	Paint and laminated colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Unpainted metal is typically CHROME. If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L). If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

ATTRIBUTES (continued)

Wood and Laminates which have a wood-like appearance are typically described as follows:

OAK-L	Pale Yellow/Golden Brown
OAK-M	Medium Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

DIMENSIONS

Measure overall casegood size to closest 1/4". Always display fractions (e.g. 32-1/4", 34-3/4", 16-1/2")

MANUFACTURER

Manufacturer name may be found inside a pedestal drawer or under worksurface. If not able to locate, list item with Manufacturer = {UNKNOWN}.

EO-EQUIPMENT OFFICE

Office equipment includes all non-computer equipment including appliances, facsimile machines, copiers, paper shredders, dictating equipment, and microfiche/film equipment.

Cell Phones

TV

Copier

Facsimile

Electric Typewriter

Refrig-Full

Microwave

Refrig-Comp Dishwasher Range Paper Shredder

TYPE	**DESCRIPTION**
(See Below)	Model Name/No. (or Part No. if no Model No.) -- look at plate on back of equipment
SHREDDER	8020
TYPEWRITER	Self Correcting II 3040
FACSIMILE	8000 *Look for 10-key pad for dialing telephone numbers)*
COPIER	5030 *Look for option buttons for number of copies, collate, staple, etc.*
MICROFICHE	648x
REFRG-FULL	3089980983 *Full size refrigerator is more than 36" in height. Note: Attribute #1 should reflect color (e.g. GOLD, WHITE) and Attribute #2 should reflect door configuration (SIDE/SIDE, TOP-FREEZER, BOTTOM-FREEZER)*

TYPE (continued)

REFRG-COMP 6246 *Compact size refrigerator is 36" or less in height.*

MICROWAVE Ultra Fast 2000

ATTRIBUTES

Generally, attributes are not required.

DIMENSIONS

Generally, dimensions are not required for office equipment unless the item takes up floor space (e.g. refrigerator, free-standing copier, etc.) In which case, measure overall size to closest 1/4". Always display fractions (e.g. 32-1/4", 34-3/4", 16-1/2")

MANUFACTURER

Manufacturer is very important. Always collect it on equipment (check plate on back on equipment).

MANUFACTURER PART NO.

Also referred to as Model Name/Number or Part Number. Note this separately even when collected as part of the DESCRIPTION above. Also, many types of equipment have model numbers which are different from part numbers. In which case, the model number goes in DESCRIPTION and the part number goes in MANUFACTURER PART NO.

EP-EQUIPMENT PERSONAL COMPUTER

Personal computer equipment includes the personal computer (often referred to as the CPU - Central Processing Unit), Monitor, Printer, Plotter, External Drive, Server, Scanner, Digital Camera, UPS, Modem, and Back-ups.

Dot Matrix Printer

Color Laser Printer

Ink Jet Printer

Server

Removable Storage, Tape Backups

Computers

Notebook

Monitors

Plotters

Scanner

Digital Camera

TYPE	**DESCRIPTION**
(See Below)	Model Name/No. (or Part No. if no Model No.) -- look at plate on back of equipment
PERS COMP	Dell XPS Tower
PORT COMP	Dell Latitude 3580
MONITOR	Dell 24 UltraSharp *Beware! if there is no CPU, a monitor may be a "thin client" to a Server Computer in which case it would be under the MF category for Main Frame Computer equipment as a THIN CLIENT.*
PRINTER-LS (Laser)	Dell Mono Printer B3460dn *Prints images sheet-by-sheet, usually has a small paper tray like a copier, no paper roller visible -- Beware! if there's a 10-key pad, it could be a fax machine.*

TYPE (continued)

PRINTER-IJ	HP - DeskJet 3631 Wireless All-In-One Inkjet Printer *Non-impact printer which "sprays" ink line-by-line, usually has "Ink Jet" in its name.*
PRINTER-DM (Dot Matrix)	OKI® Microline® 321 Turbo *Impact printer which prints images line-by-line, usually has paper with holes on border but not necessarily.*
BACK UP	Western Digital 16TB My Cloud EX2 Ultra 2-Bay Storage Server *Look for hard disk drive like device.*
UPS	APC UPS 1500VA Smart-UPS with SmartConnect

ATTRIBUTES

Generally, attributes are not required.

DIMENSIONS

Generally, dimensions are not required.

MANUFACTURER

Manufacturer is very important. Always collect it on equipment.

MANUFACTURER PART NO.

Also referred to as Model Name/Number or Part Number. Note this separately even when collected as part of the DESCRIPTION above. Also, many types of equipment have model numbers which are different from part numbers. In which case, the model number goes in DESCRIPTION and the part number goes in MANUFACTURER PART NO.

EV-EQUIPMENT AUDIO/VISUAL

Audio/Visual equipment includes slide and overhead projectors, stereo equipment, video cassette recorders, televisions, microscopes, video cameras, and video monitors.

Projector

Digital Camera

DVR/DVD Recorder

Personal Camcorder

Microscope

Professional Camcorder

Portable DVD Player

DVD and Blu-ray Disc Player

Lectern

CD Recorder Player

TYPE	**DESCRIPTION**
(See Below)	Model Name/No. (or Part No. if no Model No.) -- look at plate on back of equipment
PROJ-OVRHD	Epson PowerLite X27 XGA 3LCD
PROJ-SLIDE	Kodak 4200 Carousel
DVD PLAYER	Magnavox HD DVR/HDD 1TB ATSC Tuner

TYPE (continued)

VCR-VHS	4000 4-head VHS *Note: Attribute #1 should reflect tape size -- 1/2" is standard size of home VCR, 3/4" is a commercial recorder.*
STEREO-CD *Cassette Player*	490 Stereo Player
STEREO-POR *Portable Stereo*	M9721 Walker Plus *Note: Attribute #1 should reflect features (e.g. CASSETTE, CD, CD/CASSETTE)*
STEREO-REC *Receiver*	8020 Stereo Receiver
STEREO-SPK *Speaker*	Bosk 590
STEREO-TTB *Turntable*	Techno Z09394
TV	Model 900 *Look on plate in back for type -- maybe a monitor/receiver.*
MON/REC	Trace 400 *Look on plate in back for type, or a channel selector -- maybe a television.*
CAMERA/VID	Handcam
CAMERA/35M	35 MM II Plus

ATTRIBUTES

Generally, attributes are not required.

DIMENSIONS

Generally, dimensions are not required for audio visual equipment.

MANUFACTURER

Manufacturer is very important. Always collect it on equipment in the Description field (may be abbreviated) as well as Manufacturer field (check plate on back on equipment).

MANUFACTURER PART NO.

Also referred to as Model Name/Number or Part Number. Note this separately even when collected as part of the DESCRIPTION above. Also, many types of equipment have model numbers which are different from part numbers. In which case, the model number goes in DESCRIPTION and the part number goes in MANUFACTURER PART NO.

FS - FILES/STORAGE

Includes files, bookcases, closets, storage cabinets, and safes.

Bookcase

Safe

Lateral File Cabinet

Microfilm File Cabinets

Lateral File Cabinets

Small Storage Cabinet

File

Map File

Storage Cabinet

TYPE	DESCRIPTION	
FILE	A storage device used to arrange documents in a systematic manner for reference purposes.	
	LATERAL-2	Lateral File (most common). At least 24" wide, allows files to be stored sideways. Note overall number of drawers (e.g. LATERAL-3, LATERAL-4).
	VERT-LTR-3	Vertical Letter File. Usually 13"-16" wide, holds 8-1/2 x 11" papers, files can only be stored facing front. Note overall number of drawers (e.g. VERT-LTR-4, VERT-LTR-5).
	VERT-LGL-4	Vertical Legal File. Usually 17"-19" wide, holds 8-1/2 x 14" papers, files can only be stored facing front. Note overall number of drawers (e.g. VERT-LGL-3, VERT-LGL-5).

TYPE (continued)

MOBILE-3	Mobile File. Moveable (on casters or wheels of some kind), usually has some sort of hinged lid. Note overall number of drawers (e.g. MOBILE-2). *Beware, if the mobile unit has box or pencil drawers, it is considered a pedestal.*
MAP-FLAT-10	Flat Map File. Usually has a series of shallow (2"-5" high) drawers to lay maps, blueprints, mylar, and other documents flat. *Many times these cabinets are stacked -- look for seams!*
MAP-HANGING	Hanging Map File. A cabinet used to hang maps, blueprints and other documents. May have a top lid.
SORTER-10	Sorter for literature, stationary, or mail organization. Number of slots should be specified under description (e.g. SORTER-9, SORTER-24, SORTER-12).
ROLL	Roll File. Open box or grid which holds rolled documents.
BOOKCASE	Usually not as deep as a credenza (15" or less) with fixed and adjustable shelves used for holding books, binders or art. If there are doors, they are usually sliding.
5-HIGH	Indicate number of shelves high (e.g. 2-HIGH, 3-HIGH, 4-HIGH)

TYPE **DESCRIPTION (continued)**

STORAGE Includes Storage Cabinets (and Closets) and Safes.

CABINET	Storage Cabinet. A storage cabinet with door(s). Usually fitted with shelves, shelves and a closet, or a closet.
SAFE	Safe. Combination or key lock, reinforced walls against theft or fire.

ATTRIBUTES

No. of Drawers/Doors/Shelves

Indicate overall number of shelves and drawers, noting combinations from top to bottom as follows:

Files:

1-FL/4-DWR (LATERAL-5 with flipper door on top drawer and 4 drawers)
4-DWR (4 drawers)
1-SLD/3-DWR (LATERAL-4 with sliding doors on top and 3 drawers)

Bookcase:

2-SHELF
3-SHELF
4-SHELF
3-SHLF/2-DR (4 shelf bookcase with 3 open shelves and double doors across the bottom shelf)

Storage Cabinets and Safes:

2-DR
1-DR

ATTRIBUTES (continued)

Pull Styles

SLOT	Slot. Recessed drawer pull (5-8" wide).
FULL	Full. Recessed drawer pull across width of drawer.
HANDLE	Handle. Protruding hardware attached on both ends or across length of handle.
LEVER	Lever. Protruding hardware attached on one end only.

Feature

LIFT TOP	Lift Top. Hinged lid on mobile file.
TOP LAMIN	Laminated Top, different from case.
PULLOUT SHLF	Pull-out shelf in taller file cabinets which provides a surface to review files.

Material

LAMINATE	Plastic laminate is a thin layer of plastic which may appear to look like wood, a solid color, or textured.
WOOD	Wood and wood veneer.
METAL	Painted and unpainted metal.

ATTRIBUTES (continued)

Color/Finish

COLOR/
FINISH

Colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Unpainted metal is typically CHROME. If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L). If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

Wood, Veneer and Laminates which have a wood-like appearance are typically described as follows:

OAK-L	Pale Yellow/Golden Brown
OAK-M	Medium Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

Lock

LOCK — Indicate whether it can be locked or not.

Y	Yes
N	No

DIMENSIONS

Measure overall size to closest 1/4". Always display fractions (e.g. 32-1/4", 34-3/4", 16-1/2").

MANUFACTURER

Manufacturer is often indicated on drawer pull, on side of drawer or inside of case. Manufacturer is important.

SE - SEATING

All types of seating including chairs, sofas, guest and lounge seating.

Conf/Guest Chair
4-Leg Base

Task Chair
5-St/C Base

Lounge Chair
3-Panel Base

Drafting Chair
5-St/C w/FootRing
Base

Sofa, 3-Seat

Task Chair,
Open/T Arms

Love Seat

Task Chair, Armless

Exec Chair
Med and High Back

Stackable Chair

Conf/Guest
w/Sled base

TYPE	DESCRIPTION	
CHAIR	TASK/MD-BACK	Task or Operation Chair. Mid or Lower Back Chair, usually has a star base. Seat is typically square or deeper than it is wide. Usually has arms, but not always, and they are generally not connected to the back of the chair.
		MD-BACK Seat back stops near shoulder blades.
		LW-BACK Seat back stops below shoulder blades.
	EXEC/HI-BACK	Executive Chair. High or Mid Back Chair, usually has a star base. Seat is generally more generous than a Task Chair and usually has a high back. Always has arms, usually closed and connected to the back of the chair. Often upholstered in leather.
		HI-BACK Seat back is high enough to rest head.
		MD-BACK Seat back stops near shoulder blades.

TYPE	DESCRIPTION (continued)	
	CONF/GUEST	Conference/Guest or Side Chair. Often has a sled base or 4 legs, sometimes have star base but no castors. Conf/Guest Chairs are usually found in conference rooms and used as guest seating in offices.
	STACKABLE	Stackable Chairs. Most commonly found in cafeterias, lunch rooms and training rooms. Typically not upholstered. Sled base or 4 legs which allow them to be stacked on top of each other for storage when not in use.
	FOLDING	Folding Chairs. Collapsible chairs found in cafeterias, lunch rooms and training rooms. Typically metal frames with 4 legs that can be collapsed for storage when not in use.
	DIRECTOR	Director Chairs. Tall wood frame folding chairs with canvas back and seat cover.
	LOUNGE	Reception or Lounge Chairs. Generally, fully upholstered lower chair with closed arms.
SOFA	2-SEAT	Love seat or 2-seat Sofa. Name amount of seating available (e.g. 3-SEAT, 4-SEAT, 5-SEAT)

ATTRIBUTES

Arm Type

	ARMLESS	No arms.
	CLOSED/UPHD	Closed Arm. Arm rest is solid attaching to seat back and bottom. Note if Upholstered.
	CLOSED/PANL	Closed Panel Sides. Arm rest is solid panel to floor.
	OPEN/SLOPE	Open Slope Arm. Arm rest begins at seat back and slopes down to front side of seat bottom.
	OPEN/T	Open Arm, T-Style. Arm rest is supported by a single bar which extends from the side of the seat bottom to the center of the arm rest.
	OPEN/LOOP	Open Arm, Loop Style. Arms rest loops up from seat bottom in front and then returns to seat bottom near back -- does not attach to seat back.
	OPEN/HANDLE	Open Arm, Handle Bar Style. Arm rest is supported by a single bar which extends from the back part of seat bottom to back of arm rest.
	OPEN/FRAME	Open Frame Arm. Arm rest is formed by a rectangle or square frame which goes to seat bottom or to floor.

ATTRIBUTES (continued)

Upholstery Material

FABRIC	Fabric.
LEATHER	Leather.
WOOD	Wood or Wood Veneer.
METAL	Painted or unpainted metal.
PLASTIC	Molded plastic or urethane.
VINYL	Vinyl (synthetic leather)

Upholstery Color/Finish

COLOR/FINISH

Colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Unpainted metal may be called CHROME. Pattern Names and Color Names and Numbers can often be obtained from labels on the seat bottom of chairs.

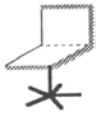
If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L). If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

Wood and Plastic which have a wood-like appearance are typically described as follows:

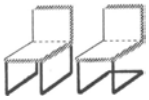
OAK-L	Pale Yellow/Golden Brown
OAK-M	Med. Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

ATTRIBUTES (continued)

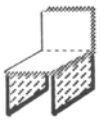
Base Type



5-ST/C — 5-Star Base with Castors (4-Star Base with Castors (4-ST/C). Without Castors (e.g. 5-ST, 4-ST)



SLED — Sled Legs. Sled style leg returns from front legs connecting to back legs, if any.



PANEL — Panel sides. Solid panels extend from seat bottom (or arm rest) to floor.

4-LEG — 4 legs. Straight legs extend from 4 corners of the seat bottom.

Base Features

PN/S/T
M/S/T
S/T

Note: diagonal (/) separates features.

PN	Pneumatic adjustable seat height (seat rises when lever is pressed).
M	Manual adjustable seat height (seat height can be adjusted by turning a knob or winding the seat).
S	Swivel Seat. Seat turns or rotates independently from seat bottom.

ATTRIBUTES (continued)

T	Tilt. Seat back (or entire seat) must tilt back -- much check for a lever to release tilt.
{N/A}	If no special features are present, indicate not applicable.

Base Material

PLASTIC	Plastic may appear to look like wood, a solid color, or textured.
WOOD	Wood or wood veneer.
METAL	Painted or unpainted metal.

Base Color/Finish

COLOR/ FINISH	Colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Unpainted metal may be described as CHROME. If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L). If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

Wood and Plastic which have a wood-like appearance are typically described as follows:

OAK-L	Pale Yellow/Golden Brown
OAK-M	Med. Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

ATTRIBUTES (continued)

DIMENSIONS

Measure overall width and depth of chair at its widest point. Chairs whose height can be adjusted should be recorded with a height of 0", other chairs should be measured from floor to top of seat back.

MANUFACTURER

Many chairs have manufacturers tag located on the seat bottom that will indicate the Manufacturer and Part or Model Number. Collect this information whenever it is present.

SY - SYSTEMS FURNITURE

Systems furniture (sometimes called modular furniture) is a series of components which are combined and recombined to make workstations or cubicles. They can be metal, wood, or laminate.

Desk, Sgl Ped-R
Bridge, Modesty Panel,
Bullnose Wksf

Cubicle

Wksf/Corner/Square edge

Desk, Sgl Ped-L, Bridge,
Credenza, Open, 2-dwr, 2-dwr
Riser-Lock, 4-dr

Desk, Sgl Ped-R, Bridge,
Wksf/Bullet, Riser-Lock, 2-dr

Pedestals, 2-F, & 2-Bx/1-F

TYPE **DESCRIPTION**

PANEL Panel. Wood, fabric, or glass panels (movable walls) that are used to create private work areas and support other components. Panels come in various heights and widths and have different capacities for electrical cord and cable management.

WOOD/FABRIC	Wood on one side, panel on the other.
GLASS	Glass.
FABRIC	Fabric on both sides.
WOOD	Wood on both sides.

PANELEND Panel End. Wood, fabric or glass panels which support the end of a worksurface.

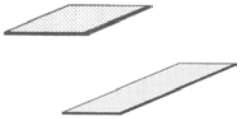
WKSURFACE

Worksurface. A combination of flat surfaces which combine to make a desktop/worksurface in the workstation. They are usually (but not always) hung or supported from a panel by cantilever bracket.

OVERALL SHAPE/EDGE STYLE

RECT/BULLNOSE
BULLET/RADIUS
CORNER/SQ EDGE
TRANS/SQ EDGE

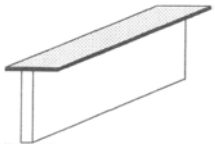
OVERALL SHAPE



RECT — Rectangular or square worksurface.

BULLET — Rectangular worksurface with rounded end -- sometimes referred to as a D-worksurface.

CORNER — Corner worksurface with straight or curved front.

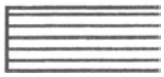
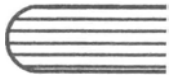
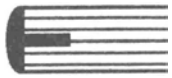
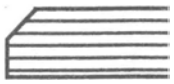


TRANS — Transaction worksurface. Shallow worksurface typically found in reception area at standing height.

TYPE **DESCRIPTION (continued)**

WORKSURFACE (continued)

EDGE STYLE

	SQ EDGE	Square Edge. Edge is at a right angle (straight up and down) with sharp corners.
	RADIUS	Radius Edge. Similar to square edge in shape except top and bottom edge are slightly rounded.
	BULL NOSE	Bull Nose. Edge is full round curve (rounded) from top to bottom.
	T-MOLD	T-Molding. Similar to radius edge in shape but has different plastic or wood trim that is attached from within. The cross section at left illustrates how t-molding gets its name.
	BEVELED	Beveled Edge. Edge is cut at an angle other than a right angle (up and down).

TYPE **DESCRIPTION (continued)**

PEDESTAL Pedestal. A combination of drawers that sits on the floor or is hung under a worksurface. Pedestal Configurations should be described from top to bottom as follows:

1-BX/1-F
2-BX
2-F
1-P/1-BX/1-F

Note: dash connects number of drawers with type of drawer, diagonal (/) separates types of drawers.

P	Pencil Drawer. Usually a shallow (2-4" high) center drawer (sometimes combined as the top drawer of the pedestal).
BX	Box Drawer. Usually 5"-7" high, used to store miscellaneous office supplies.
F	File Drawer. Over 9" high, made to store files vertically but may contain other office supplies.

PED-MOBIL Mobile Pedestal. Same as pedestal above, except it has rollers or castors.

OH/STG Overhead/Storage. Includes cabinets and open shelves that attach above worksurface level.

FLIPPER CAB/2-DR	Flipper Cabinet. Overhead storage hung from panels above worksurface with a door that opens from bottom, usually slides back into top of overhead storage unit. Specify number of doors (e.g. FLIPPERCAB/1-DR)

TYPE	DESCRIPTION (continued)	
	OPEN SHELF	Open Shelf. May have sides or simply a shelf that is hung from panels above worksurface. With certain systems you may need to specify full or half sides as follows: OPEN SHELF-FULL SIDES or OPEN SHELF-HALF SIDES.
TASKLIGHT		Tasklight. Typically the tasklight is attached below an Overhead /Storage Bin or Shelf and provides light for the work area below.
TACKBOARD		Tackboard. A fabric covered board that attaches to panels or wall track to provide tackable display surface.
FINISH POST		Finish Post. A panel post that serves as either a connector to panels or a cosmetic finish strip to panel connections or a cosmetic finishing strip on corners and straight connections.
CREDENZA		Credenza Shells. Some manufacturers of systems furniture offer pre-fabricated credenza shells. Others allow you to purchase separate components in order to create a credenza-like case (worksurface and end panels). *In both cases, pedestals are usually ordered separately.* Most customers prefer that the cataloging process (and subsequent tagging) reflect the way the product is purchased. Some prefer to have the components broken down into end panels and worksurface. The Project Manager will discuss these options with the customer and make a determination.
DESK		Desk Shells. Some manufacturers of systems furniture offer pre-fabricated desk shells. Others allow you to purchase separate components in order to create a desk-like case (worksurface, modesty panel and end panels). *In both cases, pedestals are usually ordered separately.* Most customers prefer that the cataloging process (and subsequent tagging) reflect the way the product is purchased. Some prefer to have the components broken down into worksurface, modesty panel and end panels.

ATTRIBUTES

Surface Material #1, #2 or Trim

LAMINATE	Plastic laminate is a thin layer of plastic which may appear to look like wood, a solid color, or textured.
WOOD	Wood or wood veneer.
METAL	Painted or unpainted metal.
GLASS	Glass. Usually only panels are glass (in finish note clear, smoke or color)

Surface Finish/Color #1, #2 or Trim

COLOR/
FINISH — Colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Unpainted metal may be described as CHROME.

If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L).
If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

Wood and Laminates which have a wood-like appearance are typically described as follows:

OAK-L	Pale Yellow/Golden Brown
OAK-M	Med. Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

ATTRIBUTES (continued)

Power/Lock/Grommet

Panels (Powered or Non Powered):

Y	Yes
N	No
3+D	Circuit (Usually only available by looking at Mfr Part No.)

Overhead/Storage and Pedestals:

Lock. Some overhead/storage bins and pedestals have their own key lock and should be specified as locking or non-locking.

Y	Yes
N	No

Worksurfaces:

Lock/Grommet

Y/N	Has Lock/No Grommet
Y/Y	Has Lock and Grommet
N/Y	No Lock/Has Grommet
N/N	No Lock or Grommet

Lock. Certain manufacturers make worksurfaces that are the locking controller for pedestals. The worksurfaces themselves lock as opposed to the pedestals. In this case, the worksurfaces must be specified as locking or non-locking.

Grommet. Grommets are holes in the worksurface fitted with a snap-out cover that allows you to pass cords and cables through the worksurface.

Other (Tasklights, Finish Posts, etc.):

Leave blank.

DIMENSIONS

Measure overall actual size to closest 1/4". Always display fractions (e.g. 32-1/4", 34-3/4", 16-1/2") .

MANUFACTURER

Manufacturer name may be found inside a pedestal drawer or case, or under top cap of panel.

TA - TABLES

Includes conference, computer, printer, occasional, phone, and work tables.

Occasional Table

Drafting Table

Occasional Table

Conference Table

Work Table

Occasional Table

Conference Table

Folding Table

TYPE	DESCRIPTION	
TABLE	CONFERENCE	Conference Table. Any table with room for 2 or more people to meet.
	COMPUTER/RISER COMPUTER/SHLF COMPUTER/KEYBDSHLF	Computer Table. Free standing work-surface with special accessories for computers (e.g. keyboard drawer, riser, slot for paper fee). Generally, 30" wide or wider.
	WORKTABLE	Work Table. Similar to a computer table in size but no special accessories for computer equipment.
	PRINTER	Printer Table. Small table with a slot for paper or sheet feeder basket or shelf below top surface. Generally, less than 30" wide.
	TYPEWRITER	Typewriter Table. Small table (often with casters) with knee hole that has at least one collapsible leaf. Generally, 18-24" wide without leaf extended.

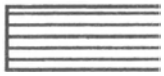
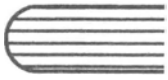
TYPE	DESCRIPTION (continued)	
	TELEPHONE	Telephone Table. Small table with square top --generally, 12x12".
	DRAFTING	Drafting Table. Typically taller than traditional worksurfaces with the ability to tilt the worksurface. Usually will have some drawing arm apparatus at the top but not always.
	OCCASIONAL	Occasional Table. Include coffee tables, end tables, parsons or library tables of various shapes and sizes.
	FOLDING	Folding Table. Tables whose legs can be collapsed or folded for storage.

ATTRIBUTES

Top Style — Describes shape of top.

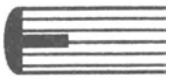
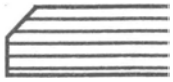
	RECTANGLE	4-sides, width not equal to depth
	SQUARE	4-sides, width equal to depth
	ROUND	perfect circle
	OCTAGON	8-sides
	PENTAGON	5-sides
	OVAL	oblong
	BOAT	shaped like a small boats hull, coming towards a point at each end (may be not actually reach point)
	HALF MOON	half circle, straight on one side.

Edge Style

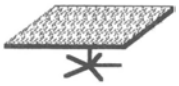
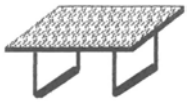
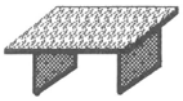
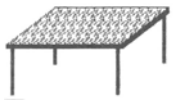
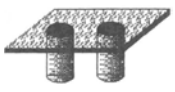
	SQ EDGE	Square Edge. Edge is at a right angle (straight up and down) with sharp corners.
	RADIUS	Radius Edge. Similar to square edge in shape except top and bottom are slightly rounded.
	BULL NOSE	Bull Nose. Edge is full round curve (rounded) from top to bottom.

ATTRIBUTES (continued)

Edge Style (continued)

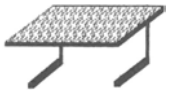
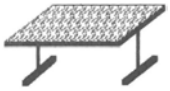
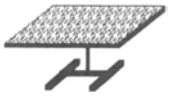
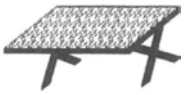
	T-MOLD	T-Molding. Similar to radius edge in shape but has different plastic or wood trim that is attached from within. The cross section at left illustrates how t-molding gets its name.
	BEVELED	Beveled Edge. Edge is cut at an angle other than a right angle (up and down).

Base Type

	5-ST	5-Star Base. Single Column towards floor, with 4, 5 or 6 legs extending for balance. (e.g. 4-ST, 6-ST)
	SLED	Sled Base. Sled style leg returns from front legs connecting to back legs, if any.
	PANEL	Panel Base. At least two solid panels extend from top to floor.
	X-PANEL	X-Panel. Two solid panels which intersect to form base of table.
	4-LEG	4-Leg Base. Straight legs extend from 4 corners of the top (or from 3 corners e.g. 3-LEG).
	2-COLUMN	2-Column Base. 1 or more round columns extend from top to floor (e.g. 2-COLUMN, 3-COLUMN).

ATTRIBUTES (continued)

Base Type (continued)

	CUBE	Cube. Sides of table meet and extend from top to floor.
	DRUM	Drum. Solid cylinder, sides of table start at top and extend to floor.
	L-LEGS	L-Legs. Typically 2 legs, 1 on each side, similar to a sled base chair -- found on computer and work tables.
	T-LEGS	T-Legs. Typically 2 legs on each side with a shorter horizontal base that forms an upside down T.
	H-LEGS	H-Legs. Typically 2 legs on each side with a shorter horizontal base with legs on each side forming an H on the floor.
	X-LEGS	X-Legs. Like a picnic table, typically 4 legs, 2 on each side which connect near the corner, cross each other at a mid point forming an "X".
	DISK	Disc Base. Typically one column or post with a single disk shaped base for balance.
	SAW HORSE	Saw Horse Legs. Typically 4 legs, 2 on each side which meet at a cross beam near the center of the table and extend out towards the floor, below their respective corners.

ATTRIBUTES (continued)

Top and Base Materials

LAMINATE	Plastic laminate is a thin layer of plastic which may appear to look like wood, a solid color, or textured.
WOOD	Wood or wood veneer.
METAL	Painted or unpainted metal.
GLASS	Glass. (in finish note clear, smoke or color)
MARBLE	Stone with a streaked or veined appearance.
GRANITE	Stone with a granular appearance (typically grey to pink in color)
STONE	Other types of stone.

Top and Base Color/Finish

COLOR/ FINISH	Colors should be listed first, followed by L for light, M for medium or D for dark (e.g. BLUE-L, BLUE-M, BLUE-D). Color/finishes include CHROME for metal and MARBLE or GRANITE for stone. If two colors, name most dominant color first (e.g. GREEN-D/BLUE-M, YELLOW-L/GREEN-L). If more than two colors, name most dominant color first followed by MULTI (e.g. GREEN-D/MULTI, YELLOW-L/MULTI)

ATTRIBUTES (continued)

Wood and Laminates which have a wood-like appearance are typically described as follows:

OAK-L	Light Yellow/Golden Brown
OAK-M	Med. Yellow/Golden Brown
OAK-D	Dark Yellow/Golden Brown
MAHOGANY	Dark Reddish/Warm Brown
WALNUT	Dark Chocolate/Ash Brown

DIMENSIONS

Measure overall actual size to closest 1/4". Always display fractions (e.g. 32-1/4", 34-3/4", 16-1/2") .

MANUFACTURER

Manufacturer name may be found underneath top. If not able to locate, list item with Manufacturer = {UNKNOWN}.

ORGANIZATION & PERSONNEL

INTRODUCTION

The Organization and Personnel tables are an optional but very useful tool. Bar|Scan does not require the information in order to record and maintain asset record information, but you might want to use at least some of the features.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

THE ORGANIZATION STRUCTURE

The organization structure identifies the group, department, and division or cost center which are responsible for each asset.

The implementation of this feature will enable you to provide meaningful asset reports to the different organizations within your company, e.g., a complete list of assets for which a particular department is responsible.

You will want to identify the organization within your company which has possession and/or is responsible for each asset.

Bar|Scan provides the *Organization Structure* feature to identify the different departments and groups within your company and assign a code which can be recorded for each asset.

When you initially start using Bar|Scan you will have to determine the structure of your organization and the names you wish to use to identify the different groups in your company.

Bar|Scan provides three organizational levels. We have named them Division, Department, and Unit. You will want to develop an organization structure which lists the different groups within your company. Note that Bar|Scan additionally provides entries for the name and telephone number of the individual using, and/or responsible for, the asset.

You can change the names of the three organizational levels with the UDF module. Please refer to Chapter 16 of this User Manual, *User Defined Fields*, for more information on creating UDFs and using this feature.

When you have determined the structure and the names you want for each of the groups, you will be required to assign a code for each. The code is provided to make it easier to record the different combinations when using the Mobile Computer.

The code you assign may or may not be a meaningful number, it is simply used to keep track of your organizational levels.

THE PERSONNEL STRUCTURE

The personnel structure identifies the people which have possession and/or is responsible for each asset.

The implementation of this feature will enable you to provide meaningful asset reports to the different personnel within your company, e.g., a complete list of assets for which a particular person is responsible.

You will want to identify the persons within your company which has possession and/or is responsible for each asset.

When you initially start using Bar|Scan you will have to determine the format of the names and what auxiliary information you wish to keep for your personnel.

Bar|Scan creates the full name of your personnel based on rules which you create. For example, you can a full name with last name then first name or the reverse. You will want to format the full name in a way that is most meaningful to your company. For most of our customers, this is making the full name by combining last, first and middle initial - in that order.

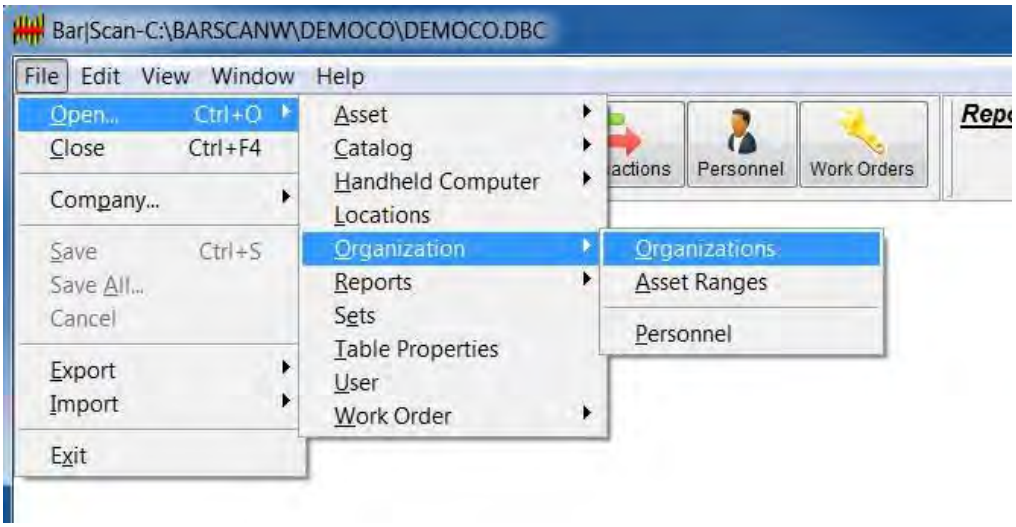
You can change the names or stretch/shrink any of these fields. Please refer to Chapter 16 of this User Manual, *User Defined Fields*, for more information on creating UDFs and using this feature.

When you have determined the structure of the names you want for each of the

groups, you will be required to build the full name field for each. This is a menu function in Bar|Scan.

THE ORGANIZATION STRUCTURE TABLE

When you want to view, change, add, or delete Organizations you will need to open the Organization table. From the Main Menu, select File . . . ▸, then Open . . . ▸, then Organizations, as shown on the following example.



Or, if you have selected to place the Tables toolbar on your Main Menu, you can simply click on the Organization icon which is shown below.

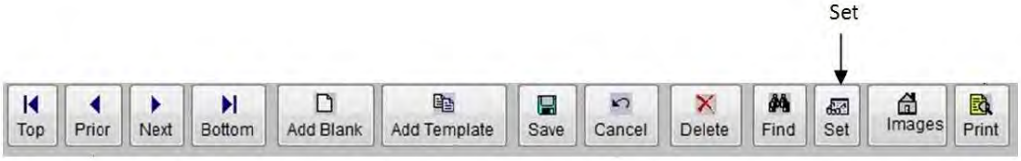
The following Organization table will appear.

The Browse tab is selected by default. This tab permits you to select Organization(s), then you can add, change, set, and view the different Organization entries on the Edit tab.

Note that the Organizations listed in the above screen meet the criteria previously established by the SET feature.

CREATING AN ORDER AND FILTER - THE SET MODE

The Browse panel is selected by default, on the Organization table. The Organization information on the Browse panel can be sorted by any field. Place your cursor in the first column on the left, and then press your right mouse button. The words “Order By” will appear, when you move your mouse over these words, a drop down menu will appear and you may select a Set from that drop down menu. Or you may select the Set button on the tool bar as shown below.



This feature will give you the ability to look at all of the Organizations, pre sorted the way you specify. If you do not specify another sort, the default sort is by Organization Code.

The SET feature works in conjunction with adding, changing, deleting, and viewing your Organizations allowing you to identify a smaller, more manageable group of organizations from which to select, e.g., organizations by Department in only those Divisions of interest.

As the number of Organizations on your system increases it becomes more time consuming to look through the entire list of organizations in the default order displayed on a look up window.

SET enables you to define an “order" which displays your items in any order so you may choose which is most effective for your current task.

SET also enables you to define a "filter" which will reject the locations which do not meet your specifications. SET provides several "filter" items.

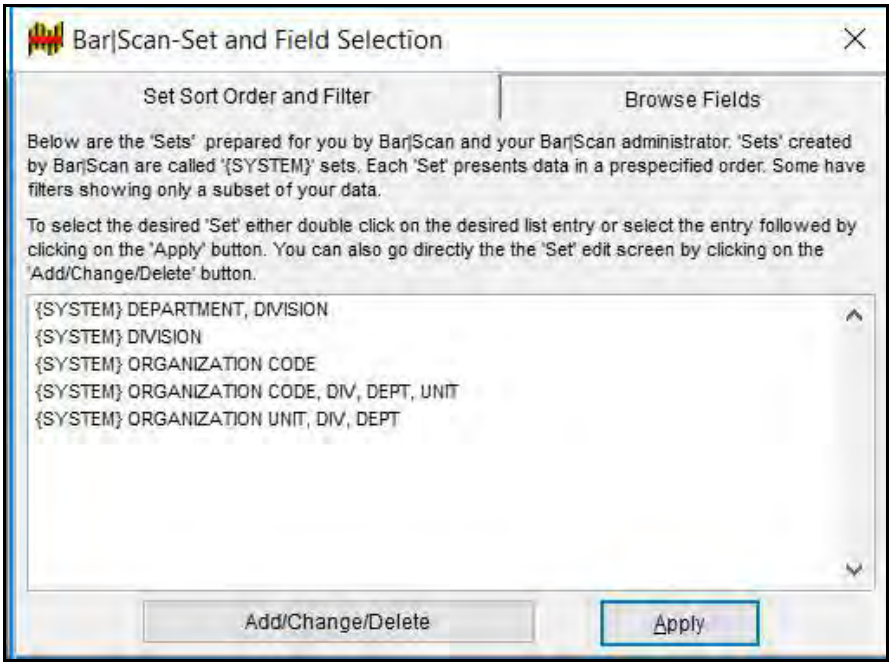
Further, you can define a "range" for a filter item by selecting and marking a block when you are presented the list.

Finally, you can identify more than one filter and/or range to further reduce the number of locations to search.

Note: Adding a filter to a Set may add a considerable amount of time to using the Set. Also, if the last Set that you use before closing a table has a filter on it, then your table may open much more slowly the next time you open it.

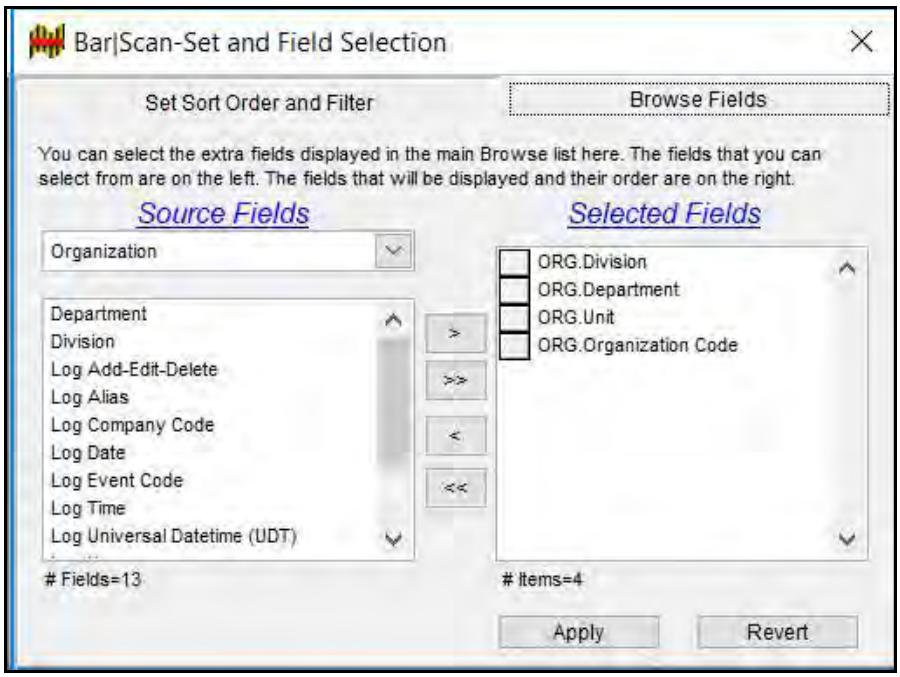
Because SET offers almost endless possibilities for identifying groups of Organizations, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any location or asset. It merely specifies the amount and the sequence of location selection lists.

When you select the SET icon, the following screen will appear:



This tab shows a list of Sets that are already created in Bar|Scan. If you would like to view the fields that will show up as columns when you are on the Organization Browse tab, select any of the sets, and then select the Browse Fields tab.

You will be shown a screen similar to the following.



On the left side of this screen there is a list of all of the available fields for the Organization table that you may display in your Sets. On the right side of this Browse Fields tab, you will see the current fields that are displayed as columns for each Set. These fields are displayed as the columns for all of the different Sets, with the exception of the first column, which always displays the current Set.

The Set feature is a powerful tool, and should be experimented with.

Remember that the SET feature works in combination with the F4 (Range) key, allowing you to make powerful, global edits with a minimum of keystrokes. For example, you can change all occurrences of "Finance" to "Accounting" with only a couple of keystrokes if the information is properly SET.

For more information on the SET feature, refer to Chapter 5 - *Operating the System.*

DISPLAYING AN ORGANIZATION STRUCTURE ENTRY

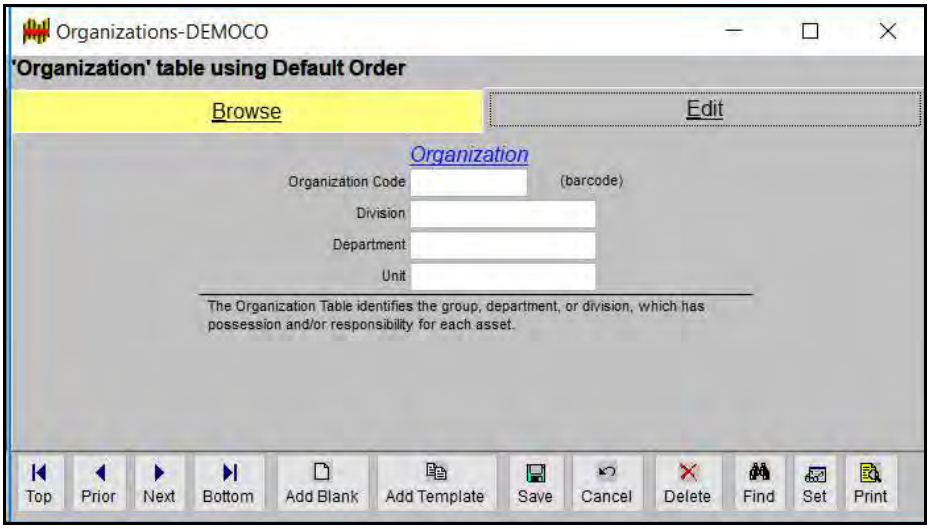
The Edit tab permits you to display the current information about a particular Organization Structure code.

From the Browse tab, choose an Organization Structure Code and press ENTER. Then, select the Edit tab. The selected entry will be displayed.

ENTERING A NEW ORGANIZATION STRUCTURE

Add Blank and Add Template both enable you to enter new Organization Structure codes and names into the Bar|Scan system.

While on the Organization Browse tab, move the highlight bar using the cursor movement keys or mouse to go through the list. When the desired entry is found, move the highlight bar over it and press the <ENTER> key, selecting an Organization. Then, to select the Add Blank Item or Add Template Item, press their corresponding button on the tool bar. Next, select the Edit tab. The information for the Organization that you have selected will be displayed on a screen similar to the one below.



Entering the New Information

After you have selected a Blank screen or a similar Template screen, the information will be displayed and the cursor will be positioned for you to enter the new Organization Structure Code information.

You may use the arrow keys, the TAB key, the mouse, or the <ENTER> key to move to the different items on the screen.

Each of the entry items has associated look up windows to assist you with your entry.

Pressing the Esc key returns you to the Main Menu. Note if you have pending changes or deletions you will be prompted to cancel or save these changes or deletions before you will be allowed to exit the Organization table.

Note: You do not have to return to the Browse tab in order to select Add Blank or Add Template Organization. You may simply press the corresponding icon on the tool bar from the Edit tab, and then proceed to add your new Organization.

See Chapter 5 of this User Manual, *Operating the System*, for specific instructions about cursor movement keys, function keys, and how to operate the look up windows.

Generating Organizational Codes Automatically

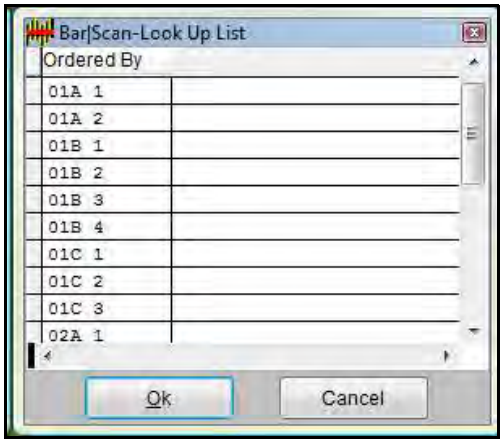
You can let Bar|Scan generate a numeric organization code by putting a check mark in the 'Automatically generate Organization codes' option within the first tab of the Company screen. Once done, a newly added Organization entered in the Organization Edit screen will have a numeric organization automatically generated when saved.

To access the Company Screen , from the Main Menu, select File . . . ▸, then Company . . . ▸, then Housekeeping ▸, then Settings.

Go to Tab #1 (Standard Options) and put a check mark in the 'Automatically generate Organization codes' option, press save.

The Organization Structure Code

The Organization Structure Code is non structured, and up to six digits in length. To view the Organizations that are currently entered into your system you may right click or press the F5 key while on the Organization field, and select Look up Value. You will be shown a look up window similar to the one below.



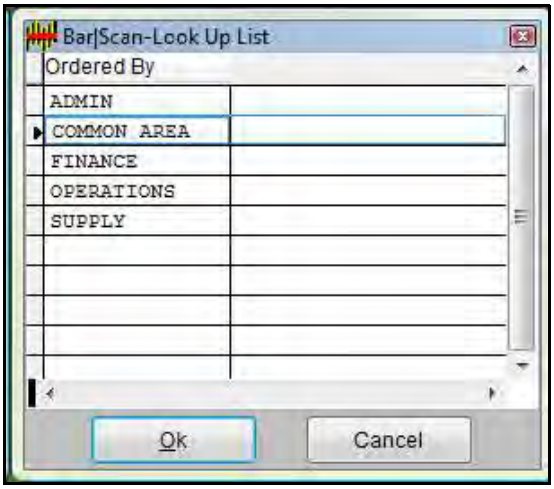
Note: The Organization codes shown above are all five digits in length. This is only a sample of one type. Your Organization codes can be structured with or without letters, with or without numbers, and from one to six digits in length.

The Organization Codes that will appear in this look up window are those that have already been used in your Bar|Scan system. When creating new Organization Codes, you must ensure that your new code does not match any of the existing Organization Codes.

Division, Department, And Unit

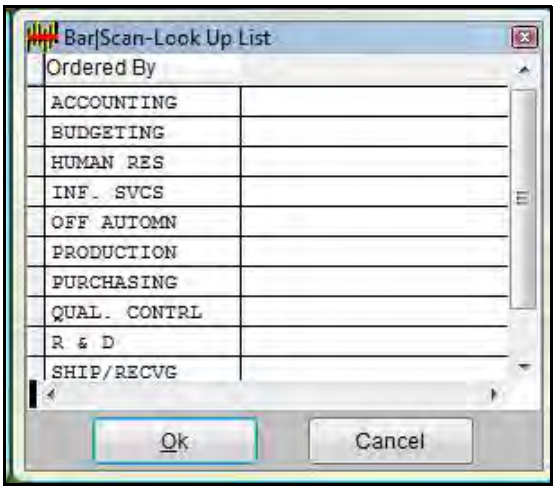
Once you have entered the Organization Code, you will be requested to assign information to the Division, Department, and Unit. The cursor will be positioned for you to enter the Division name.

To view the Divisions that are currently entered into your system you may press the F5 key or right click on the Division field, and select Look up Value. You will be shown a look up window similar to the one below.



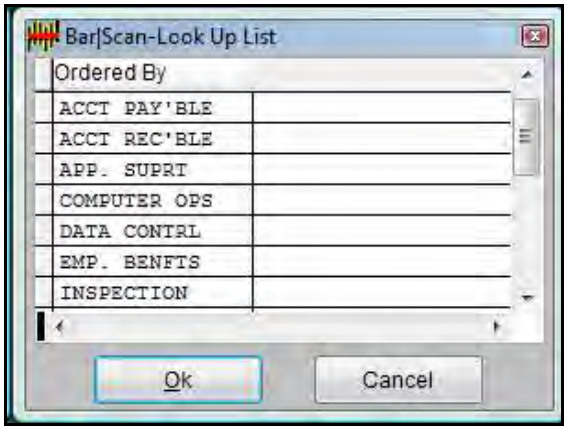
The Selection Window lists the existing Division Names. Either move the highlight bar to the desired name and press OK or press the Cancel button and type a new Division name. When the entry is complete, and you have pressed ENTER, you will be positioned to enter or select the Department name.

To view the Departments that are currently entered into your system you may right click on the Department field or press the F5 key, and select Look up Value. You will be shown a look up window similar to the one below.



The Selection Window lists the existing Department Names. Either move the highlight bar to the desired name and press ENTER or press the Cancel button and type a new Department name. When the entry is complete, and you have pressed <ENTER>; you will be positioned to enter or select the Unit name.

To view the Units that are currently entered into your system you may press the F5 key or right click on the Department field, and select Look up Value. You will be shown a look up window similar to the one below.



The Selection Window lists the existing Unit Names. Either move the highlight bar to the desired name and press ENTER or press the Cancel button and type a new Unit name.

Some caution should be observed when determining the name which will be associated with a particular code. Whereas Bar|Scan will NOT allow you to duplicate an existing code, you may assign the same name to a different code. For example, you might inadvertently assign the same name to two different Division Codes. This is not as important with Department and Unit because you may well want the same Department name in two different Divisions.

Simply enter the new information, and Save the information you have entered by pressing the Ctrl + S key combination, or click on the Save button on the tool bar.

ENTERING A BLANK ORGANIZATION STRUCTURE

If you do not wish to have Bar|Scan validate the organization in your Transaction Table, you may do so by entering a blank Organization Code.

Having a blank Organization Code in your computer as a valid response, will allow those actually doing the inventory with the Mobile Computers to leave the Organization Code blank. When the information is uploaded into the computer, and the Transactions are validated, those that have a blank Organization Code will be considered valid.

To reject blank organization codes as a valid response, you must delete the blank organization structure.

CHANGING ORGANIZATION STRUCTURE INFORMATION

From time to time you will want to change, correct, or add information associated with Organization Structure names or codes currently existing in the Bar|Scan system.

While on the Organization Browse tab, type the first digits of the code, or use the arrow keys or the TAB key to move the highlight bar to the item you wish to change, and press the <Enter> key. Next, select the Edit tab. You may now change any of the information listed on this tab by simply typing in the new information, or by using the Look up Value feature.

When you have completed and saved the changes, all assets assigned the Organization Structure Code being changed will immediately reflect the changes.

DELETING AN ORGANIZATION STRUCTURE ENTRY

This feature completely removes an Organization Structure entry from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

Removing Organization Structure entries from the system is most often done due to erroneous entries.

Bar|Scan **will not** permit you to delete any Organization Structure entry currently assigned to an asset. You will however, want to update the Organization information for each asset using the deleted Organization Structure entry.

When you have used an Organization Code with erroneous data entered into it, you will have to first add an Organization Code that has the correct data.

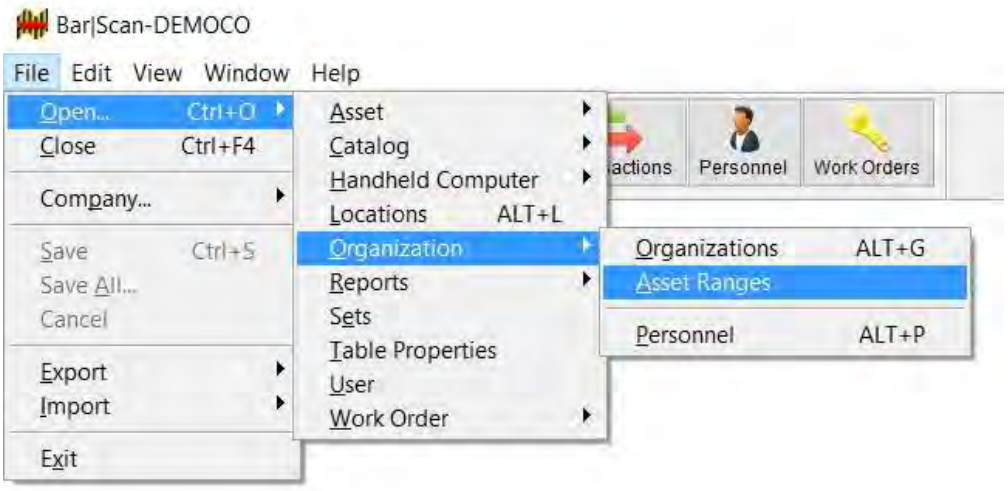
Next, go to the Asset table, and use the Set feature to correct the affected assets. Select Set, and then select the Organization Code Set. This will sort all of your Assets according to their associated Organization Code. Next, Range all of the Assets that have the Organization Code that you wish to delete, and change the Organization Code on all of the selected Assets at one time.

Next, go to the Transaction table, and use the Set and Range features to change all of the Transactions that use the Organization Code that you wish to delete.

Then, go back to the Organization table. Move the highlight bar to the Organization Code that you wish to delete, and press the F4 key (Range feature.) Select the Delete button from the tool bar. A dialog box will appear to ask you to verify that you want to DELETE the Organization Code (Structure entry.) If you respond Yes, you will see another dialog box that will ask you to confirm your choice. When you respond Y(es), the Organization Structure entry will be removed.

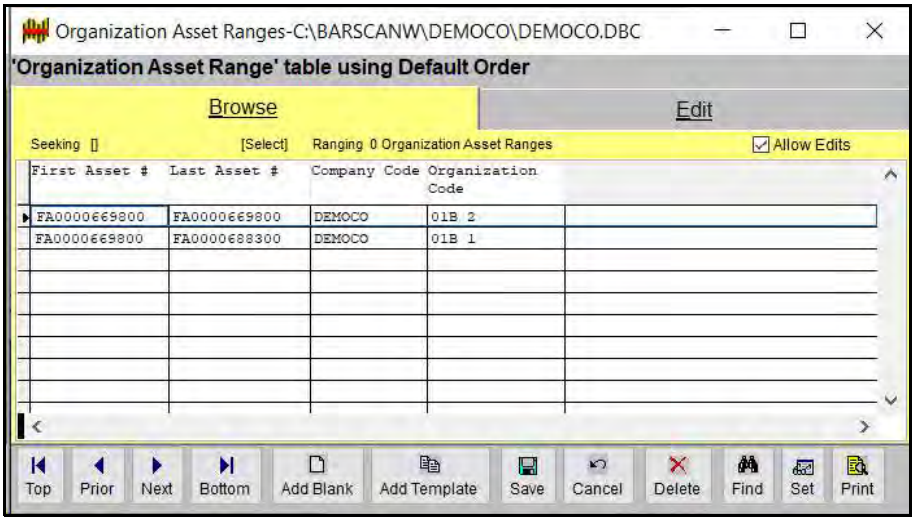
ASSET RANGES

Asset Ranges is a feature that you can access by going to the Main Menu, select File . . . ▸, then Open . . . ▸, then Asset Ranges, as shown on the following example.

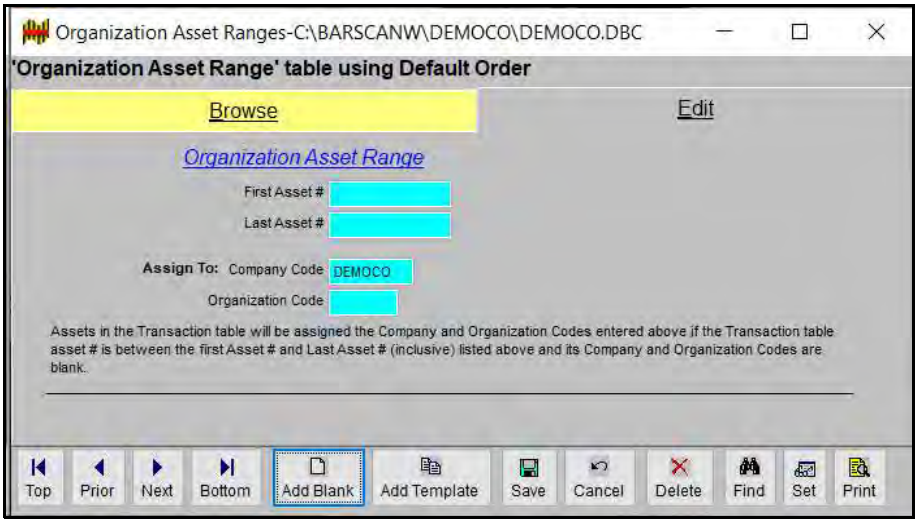


This item can be used to allocate ranges of asset tags in advance to a specific department or to a specific company within Bar|Scan.

When you select Asset Ranges from the Main Menu, you will see a table similar to the one below.

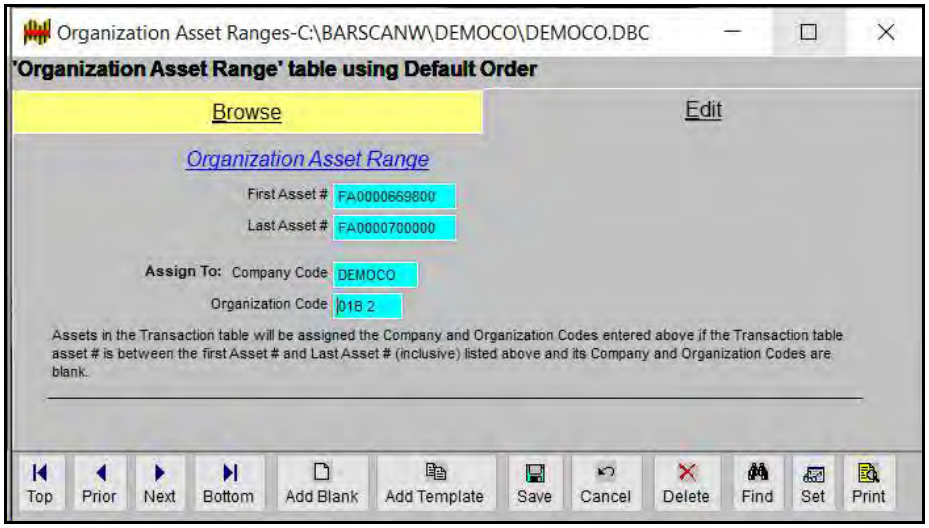


The first time that you open Asset Ranges you will be shown a Browse panel that does not have any information in it. Select the Add Blank button from the tool bar, and then select the Edit tab which is shown below.



This feature will enable you to allocate out Asset labels, and keep track of whom you gave them to by Company Code or by Organization Code. List in this table the first label and the last label of each group of assets, and then keep track of whom you gave them to by Company Code or Organization Code.

You list a range of assets, and specify a Company and/or an Organization Code for the range as shown below.



You would normally fill out this table to set up the range when you are issuing the Asset labels.

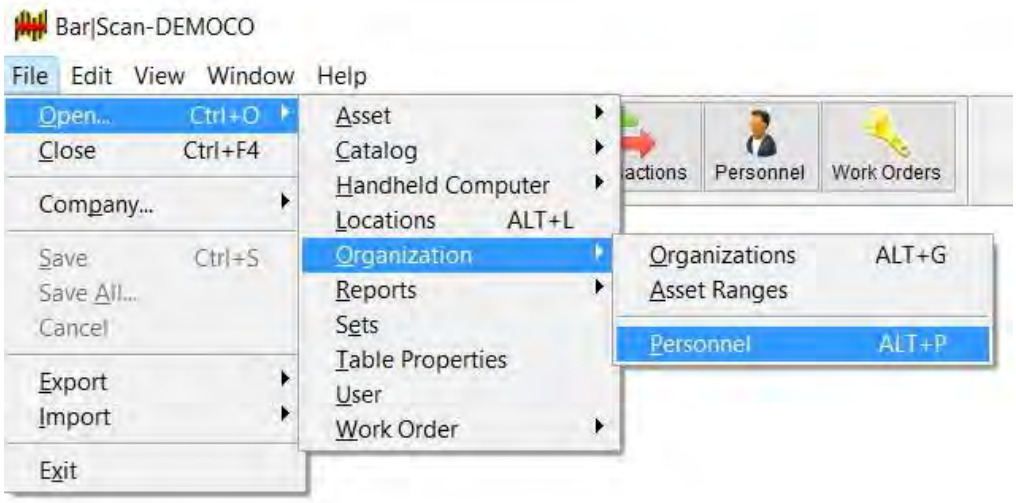
When the Asset labels are used during the course of an inventory, the user should leave the Company Code and the Organization Code blank. When the items are validated in the Transaction table, the information for the Company Code and/or the Organization Code from this table will be added to those Transactions.

If an Organization Code is entered, then all items are validated in the Transaction Table, and the Asset labels fall within the First and Last Asset number, and the Organization Code does not match the Code entered, then the Transaction will **NOT MOVE** into the Asset Table.

Note: If a different Organization Code or Company Code is used during the course of the inventory, the Bar|Scan system will **NOT** treat it as an error, and will **NOT** alert you of the differences. Bar|Scan will only use this information to fill in the two fields if they are left blank.

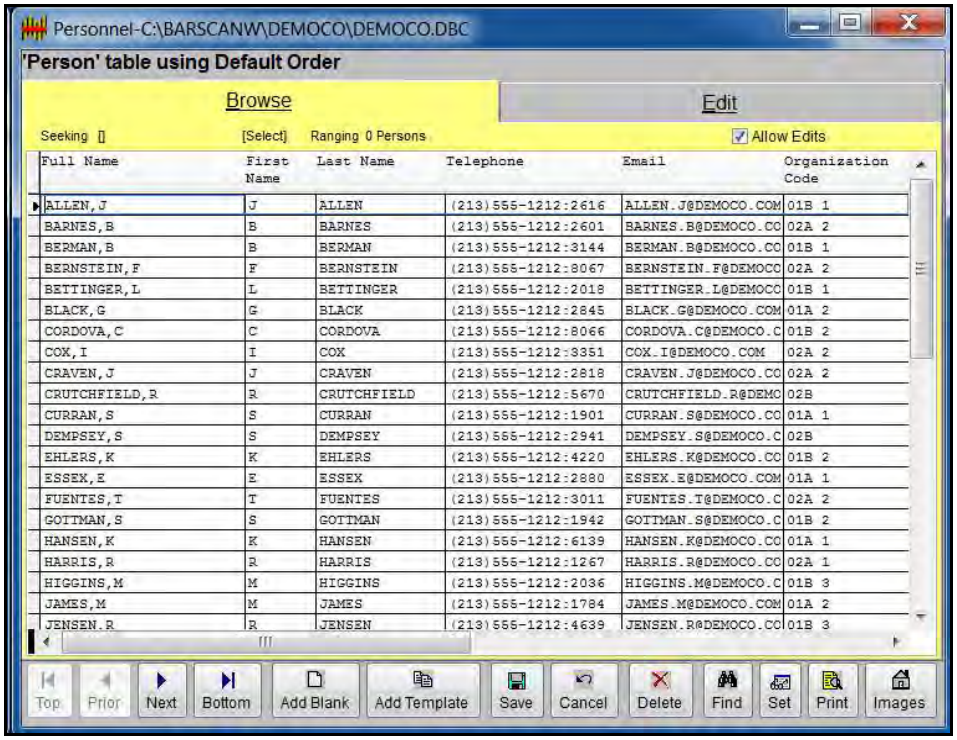
THE PERSONNEL TABLE

When you want to view, change, add, or delete Personnel you will need to open the Personnel table. From the Main Menu, select File . . . ▸, then Open . . . ▸, then Personnel, as shown on the following example.



Or, if you have selected to place the Tables toolbar on your Main Menu, you can click on the Personnel icon which is shown below.

The following Personnel table will appear.

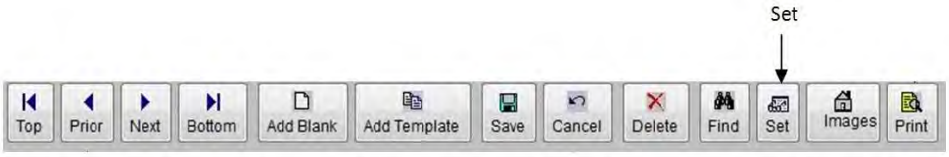


The Browse tab is selected by default. This tab permits you to select Person(s), then you can add, change, set, and view the different Personnel entries on the Edit tab.

Note that the Names listed in the above screen meet the criteria previously established by the SET feature.

CREATING AN ORDER AND FILTER - THE SET MODE

The Browse panel is selected by default on the Personnel table. The Personnel information on the Browse panel can be sorted by any field. Place your cursor in the first column on the left, and then press your right mouse button. The words “Order By” will appear, when you move your mouse over these words, a drop down menu will appear and you may select a Set from that drop down menu. Or you may select the Set button on the tool bar as shown below.



This feature will give you the ability to look at all of the Personnel, pre sorted the way you specify. If you do not specify another sort, the default sort is by Full Name.

The SET feature works in conjunction with adding, changing, deleting, and viewing your Personnel allowing you to identify a smaller, more manageable group of organizations from which to select, e.g., Personnel by Location in only those Buildings of interest.

As the number of Personnel in your system increases it becomes more time consuming to look through the entire list of names in the default order displayed on a look up window.

SET enables you to define an “order" which displays your items in any order so you may choose which is most effective for your current task.

SET also enables you to define a "filter" which will reject the locations which do not meet your specifications. SET provides several "filter" items.

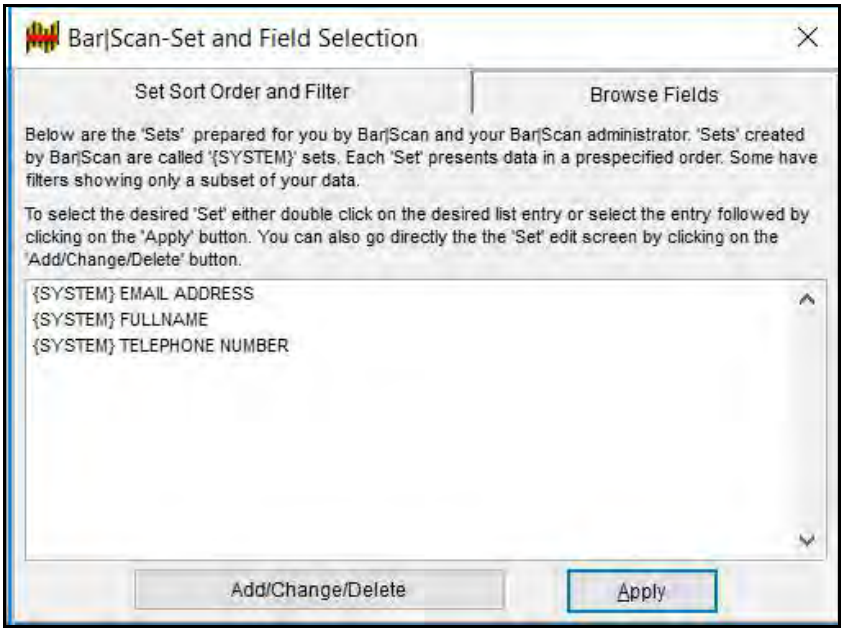
Further, you can define a "range" for a filter item by selecting and marking a block when you are presented the list.

Finally, you can identify more than one filter and/or range to further reduce the number of locations to search.

Note: Adding a filter to a Set may add a considerable amount of time to using the Set. Also, if the last Set that you use before closing a table has a filter on it, then your table may open much more slowly the next time you open it.

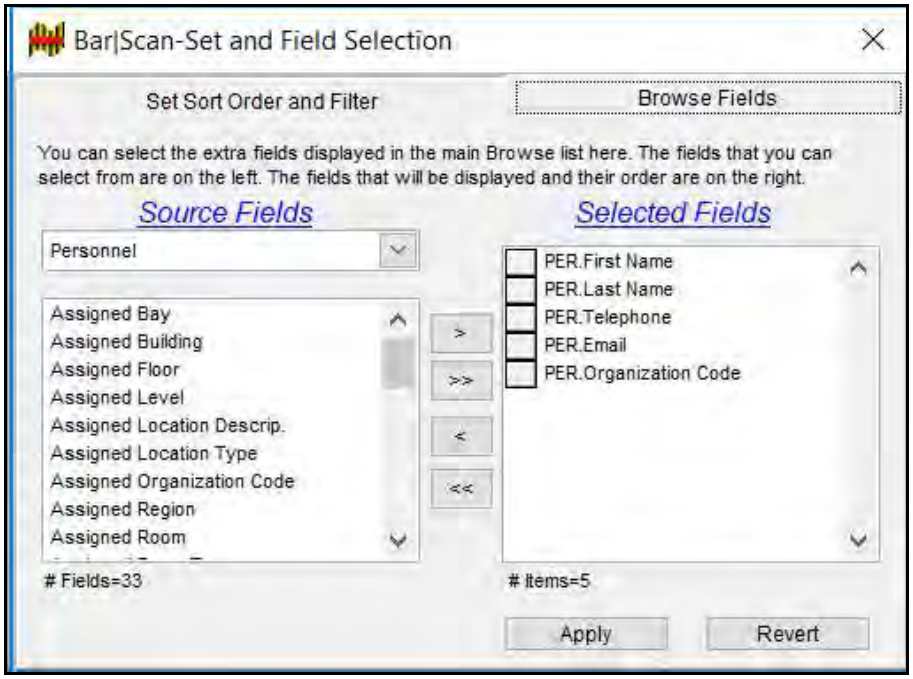
Because SET offers almost endless possibilities for identifying groups of Personnel, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any location or asset. It merely specifies the amount and the sequence of location selection lists.

When you select the SET icon, the following screen will appear:



This tab shows a list of Sets that are already created in Bar|Scan. If you would like to view the fields that will show up as columns when you are on the Personnel Browse tab, select any of the sets, and then select the Browse Fields tab.

You will be shown a screen similar to the following.



On the left side of this screen there is a list of all of the available fields for the Personnel table that you may display in your Sets. On the right side of this Browse Fields tab, you will see the current fields that are displayed as columns for each Set. These fields are displayed as the columns for all of the different Sets, with the exception of the first column, which always displays the current Set.

The Set feature is a powerful tool, and should be experimented with.

Remember that the SET feature works in combination with the F4 (Range) key, allowing you to make powerful, global edits with a minimum of keystrokes. For example, you can change all occurrences of one Organization Code to another with only a couple of keystrokes if the information is properly SET.

For more information on the SET feature, refer to Chapter 5 - *Operating the System.*

DISPLAYING A PERSONNEL ENTRY

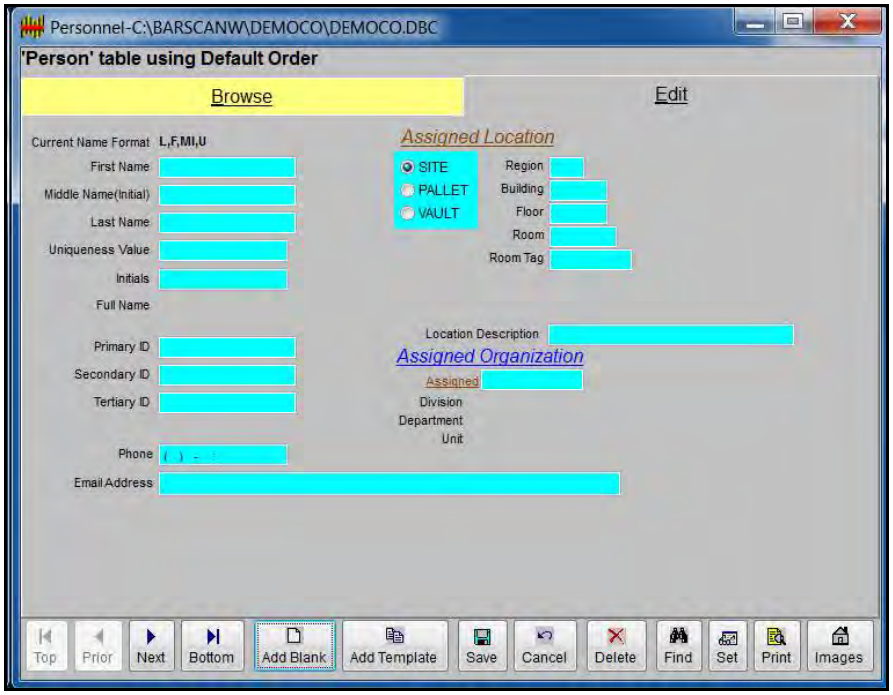
The Edit tab permits you to display the current information about particular Personnel.

From the Browse tab, choose an Name by clicking on it. Then, select the Edit tab. The selected entry will be displayed.

ENTERING NEW PERSONNEL

Add Blank and Add Template both enable you to enter new Personnel and other details into the Bar|Scan system.

While on the Personnel Browse tab, move the highlight bar using the cursor movement keys or mouse to go through the list. When the desired entry is found, move the highlight bar over it and press the <ENTER> key, selecting an Personnel. Then, to select the Add Blank Item or Add Template Item, press their corresponding button on the tool bar. Next, select the Edit tab. The information for the Personnel that you have selected will be displayed on a screen similar to the one below.



Entering the New Information

After you have selected a Blank screen or a similar Template screen, the information will be displayed and the cursor will be positioned for you to enter the new Personnel information.

You may use the arrow keys, the TAB key, the mouse, or the <ENTER> key to move to the different items on the screen.

Each of the entry items has associated look up windows to assist you with your entry.

Pressing the Esc key returns you to the Main Menu. Note if you have pending changes or deletions you will be prompted to cancel or save these changes or deletions before you will be allowed to exit the Personnel table.

You do not have to return to the Browse tab in order to select Add Blank or Add Template Personnel. You may simply press the corresponding icon on the tool bar from the Edit tab, and then proceed to add your new Personnel.

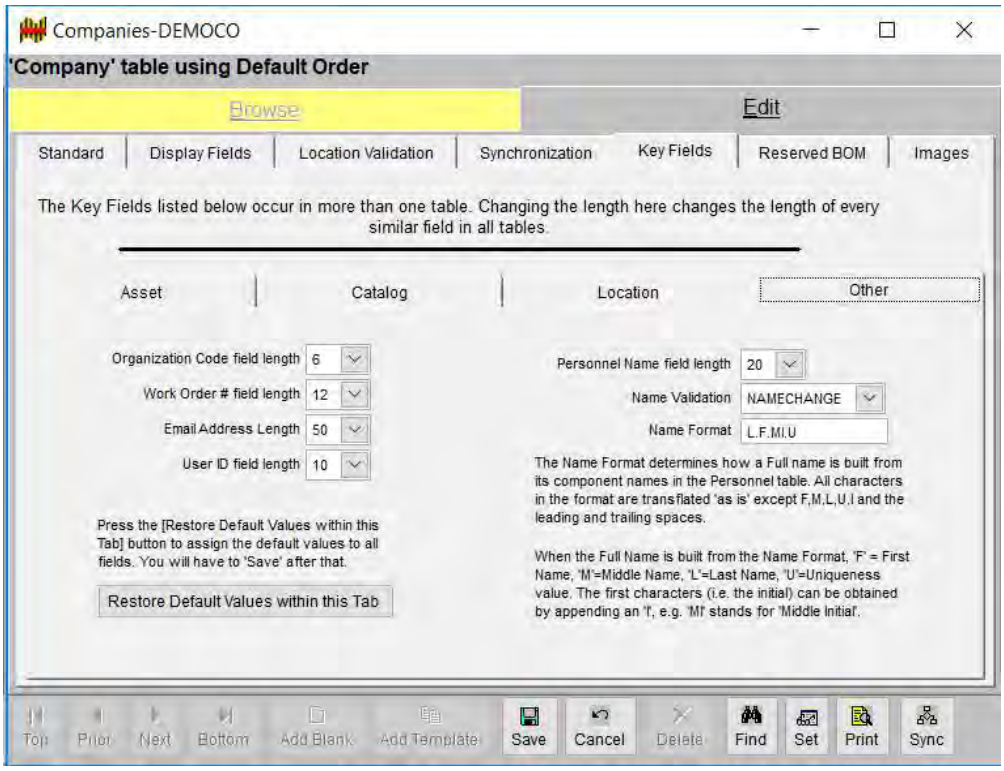
See Chapter 5 of this User Manual, *Operating the System*, for specific instructions about cursor movement keys, function keys, and how to operate the look up windows.

Formatting the Full Name

Bar|Scan generates the Full Name by combining multiple separate name fields according to rules that you create in the Company Settings Screen.

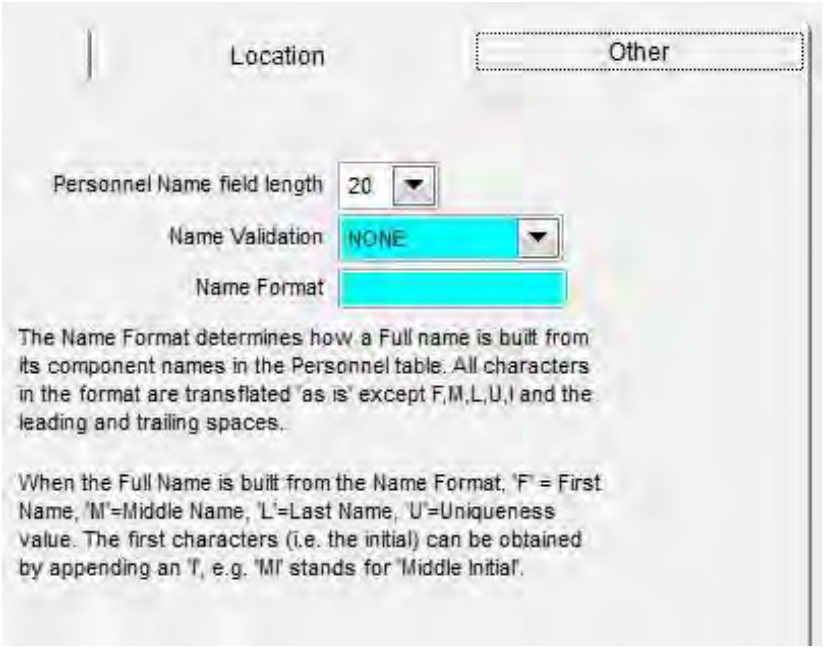
To access the Company Settings Screen , from the Main Menu, select File . . . ▸, then Company . . . ▸, then Housekeeping ▸, then Settings.

You will see the following Screen:



As you can see, there are many different ways to allow the formatting of the Full Name field.

If you elect to not use the Personnel Table and use free form Name entry as used in Bar|Scan prior to version 2.8.2, you should set the Name Validation entry to NONE as shown in the following screen:



Below are the fields that are currently designated as NAME fields. They are checked against the Personnel Table's Full Name field.

Asset Table:

Current Name (L_NAME field)
Name (OW_NAME field)
Prior Name (O_NAME field)

Asset Location History Table:

Name (O_NAME field)

Mobile Computer Advanced Settings Table:
User Name (OWNER field)

Transactions Table:
Name (OW_NAME field)

Work Order Master Table:
Name-Requested By (OW_NAME field)
Name-Taken By (WM_TBNAME)

Any name in the list above that is edited is then verified against the 'Fullname' field in the Personnel Table based on one of the three settings in the Company Settings Screen. The three choices are:

NONE - This is the default setting. No check is made against the personnel table. The only use of the personnel table is as a popup resource to help populate name fields.

NAMECHANGE - Name fields are checked for validity ONLY if they are specifically edited or changed. For example, consider an Asset table item with two invalid fields, the Catalog Number and Owner Name fields. If you only change the Catalog Number field, you will get no message that the Owner Name is invalid since you did not specifically edit the Owner name field. If you do specifically edit the Owner name field and it results in a name that is not in the Personnel table then you will get the invalid name message.

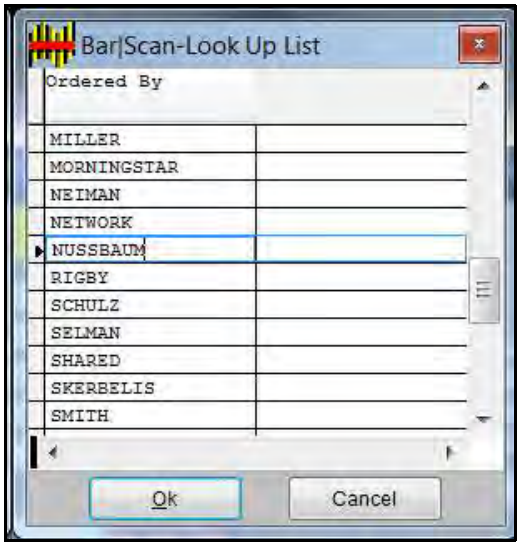
ANYCHANGE - Any change or edit to any field in a table will trigger all name fields to be checked within that item.. For example, consider an Asset table item with two invalid fields, the Catalog Number and Owner Name fields. If you only change the Catalog Number field, you WILL get a message that the Owner Name is invalid, even though you have not directly edited that field.

When initially using the Personnel table it is recommended that this validation be implemented in stages, first NONE, then NAMECHANGE, then when all names have been cleaned up, progressing to the most stringent, ANYCHANGE.

First Name, Middle Name (Initial), And Last Name

Begin data entry be entering the Names of your personnel. The cursor will be positioned for you to enter the First Name.

To view any of the data currently entered into your system you may press the F5 key or right click on any of the fields, and select Look up Value. You will be shown a look up window similar to the one below.



The Selection Window lists the existing Last Names. Either move the highlight bar to the desired name and press OK or press the Cancel button and type a new Last Name. When the entry is complete, and you have pressed ENTER, you will be positioned to enter or select the next field.

Uniqueness Value

If you have more than one person with the same name, you can use this field to differentiate between the names. Any numbers or words that you wish to use can be entered into this field such as 1,2,3.

Based on the Name Format rules that you set in Company Settings, the Uniqueness Value Field may or may not be combined into the Full Name Field.

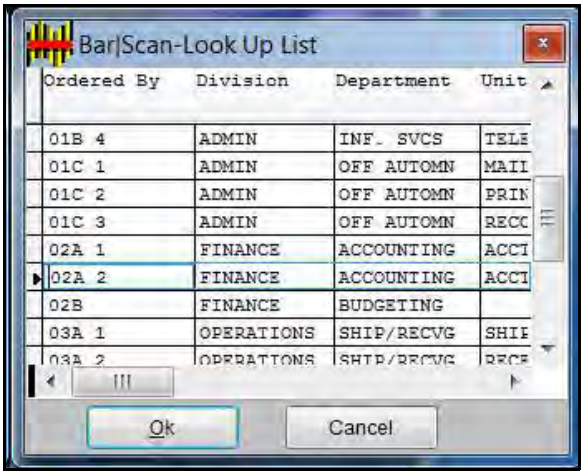
Primary ID, Secondary ID, Tertiary ID and Email

These fields can be used for any information of your choice. You can enter Employee ID Numbers, Job Titles or emails.

Simply enter the new information, and Save the information you have entered by pressing the Ctrl + S key combination, or click on the Save button on the tool bar.

Organization

The Organization allows you to assign an Organization to your Personnel. You might consider this the Organization that is associated with each Person in the table. To view the Organizations that are currently entered into your system you may right click or press the F5 key while on the Organization field, and select Look up Value. You will be shown a look up window similar to the one below.

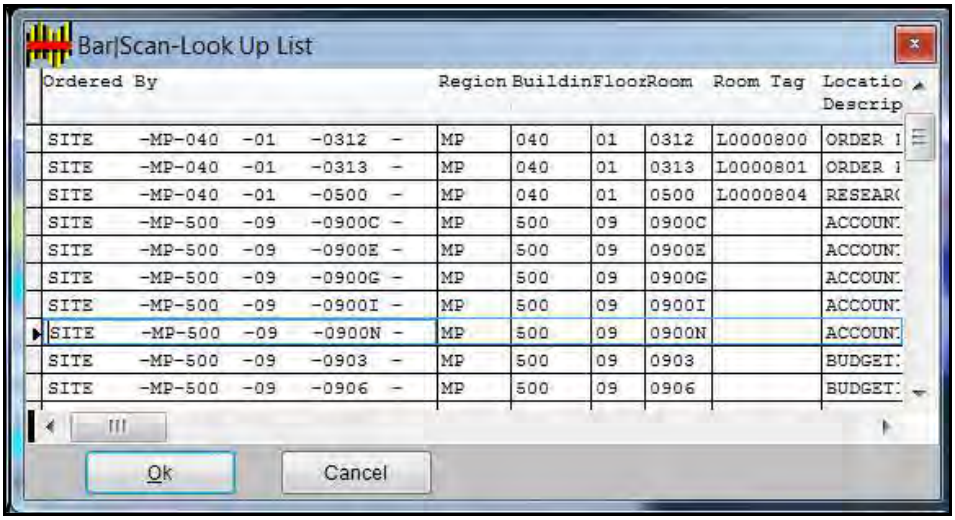


Note: You can right click and resort the Look up in any order in order to find the particular Organization that you would like to assign.

Bar|Scan does not use this field in any logical or validation feature. This is simply for reference information.

Current Location

The Current Location allows you to assign a default Location to your Personnel. You might consider this as the Location that is associated with each Person in the table. To view the Locations that are currently entered into your system you may right click or press the F5 key while on any of the Location fields, and select Look up Value. You will be shown a look up window similar to the one below.

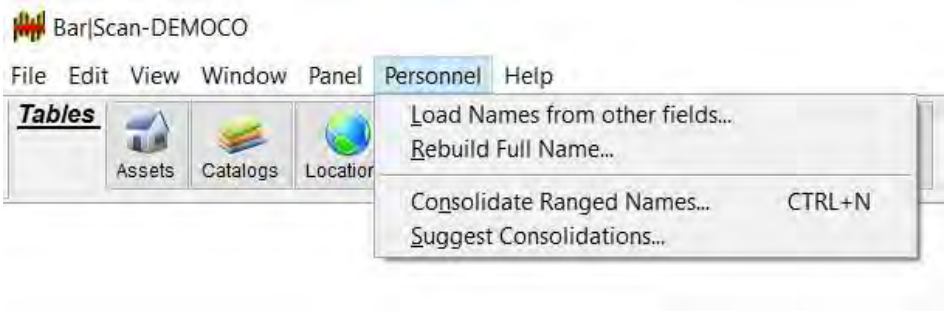


Note: You can right click and resort the Look up in any order in order to find the particular Location that you would like to assign.

Bar|Scan does not use this field in any logical or validation feature. This is simply for reference information.

LOAD ASSET OWNER NAMES

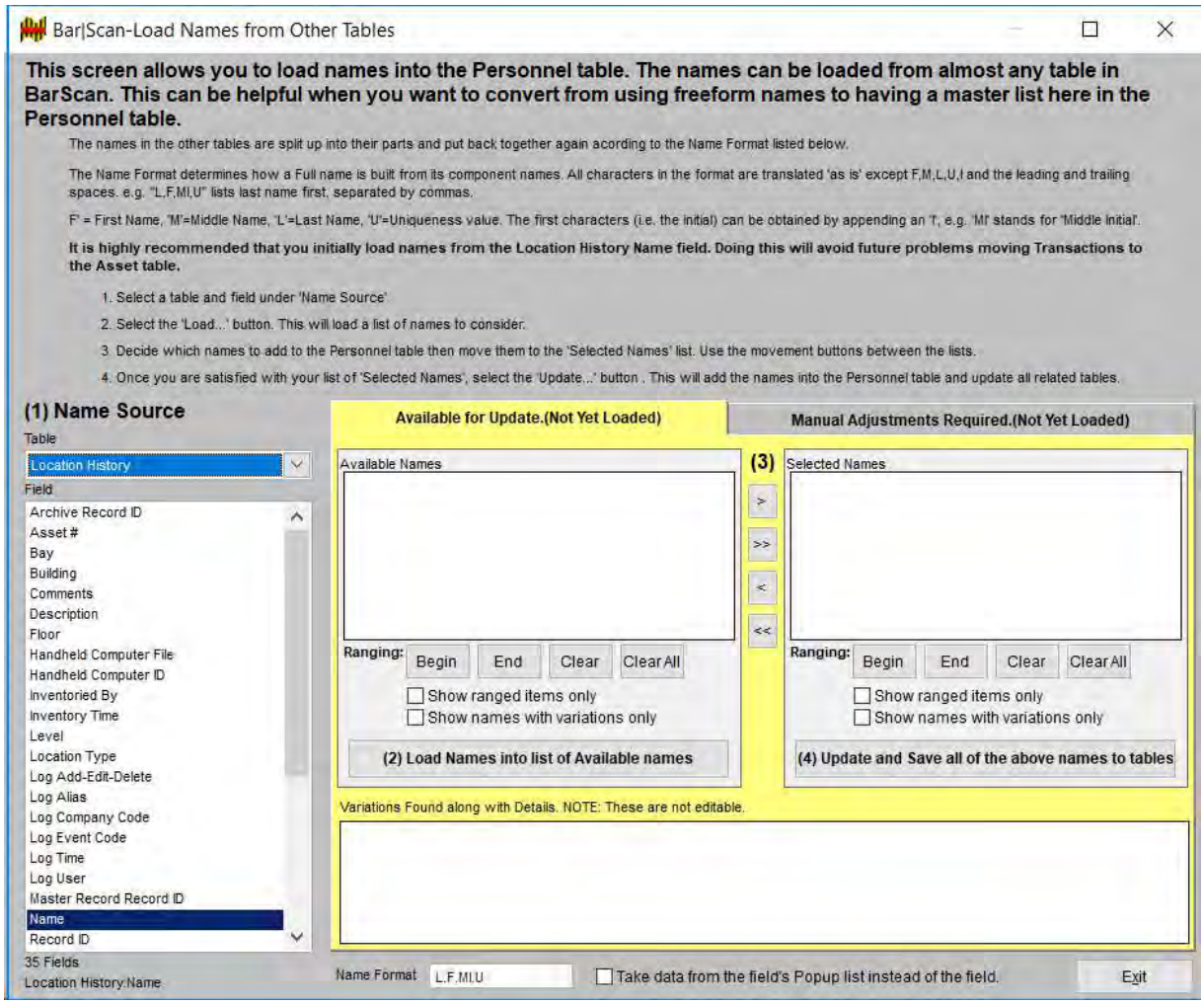
When you have the Personnel table open, the Main Menu changes slightly, so that the Personnel Features are listed next to the Help as shown below.



You can use this feature to Load (import) all of the names from the Asset Table or Popup Fields Table or another table of your choice into the Personnel Table.

The names are parsed according the rules entered into the Company Settings Table and then loaded. You can elect not to load the names from the Popup Fields Table during this process.

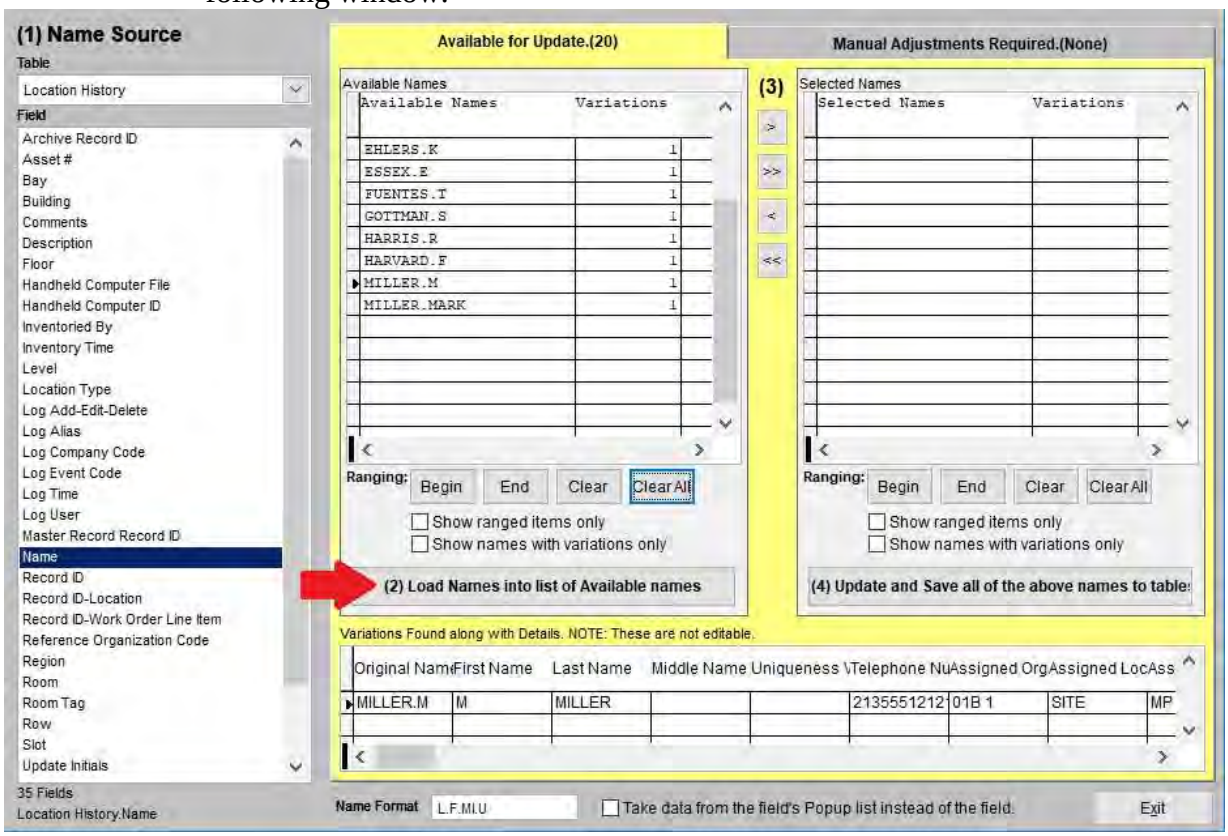
To begin this process click on “Load Asset Owner Names from other fields...”. You will be shown a window similar to the one below:



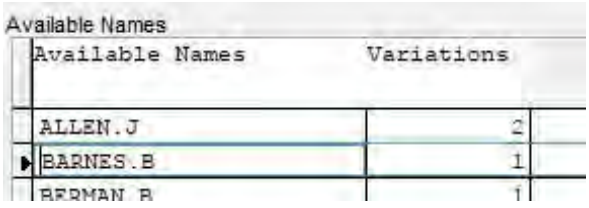
In the example above, we have chosen to load the Personnel table from existing names located in the Asset Table.

The format will be L,F,MI,U which is Last Name then First Name then Middle Initial and finally unique. The Uniqueness value keeps names from being duplicated.

Press the '(2) Load Names into list of Available names' button as indicated on the following window.



If you see more than one in the variation column, it means that Bar|Scan found names that are similar with slight changes in punctuation as shown below:



If a name has only 1 variation, you can move it into the list on the right without question. If it has 2 or more variations manually examine them in the list at the bottom of the panel to make sure that they really are the same person. Most of the

time this will be true since only minor variations will display on this screen. Normally there should be very few multiple variations. Normally even those listed can be combined, but it is safer to check. If you believe that the variations are actually different people then you will need to stop, exit and edit the source of the names.

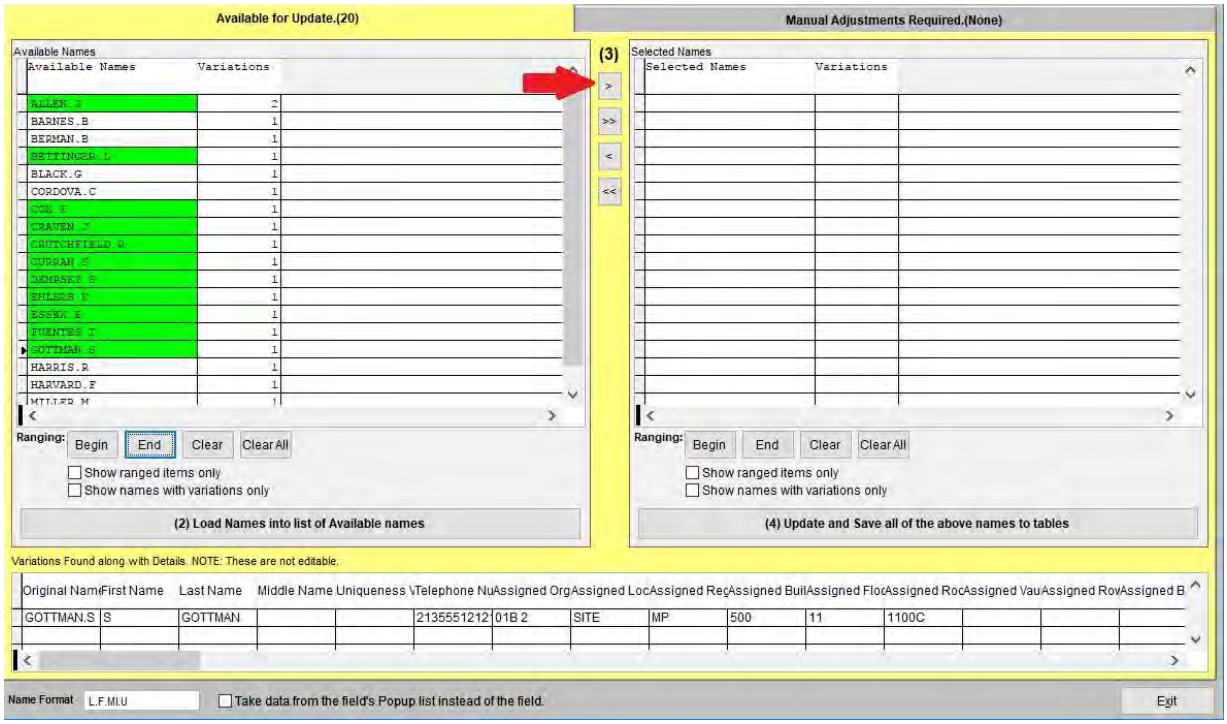
In other words, you will only have to do anything more than the above under two circumstances.

1: The name gets put into the 'Manual Adjustments' tab.
2: One or more of the variations listed at the bottom are actually not the same person as any of the others listed.

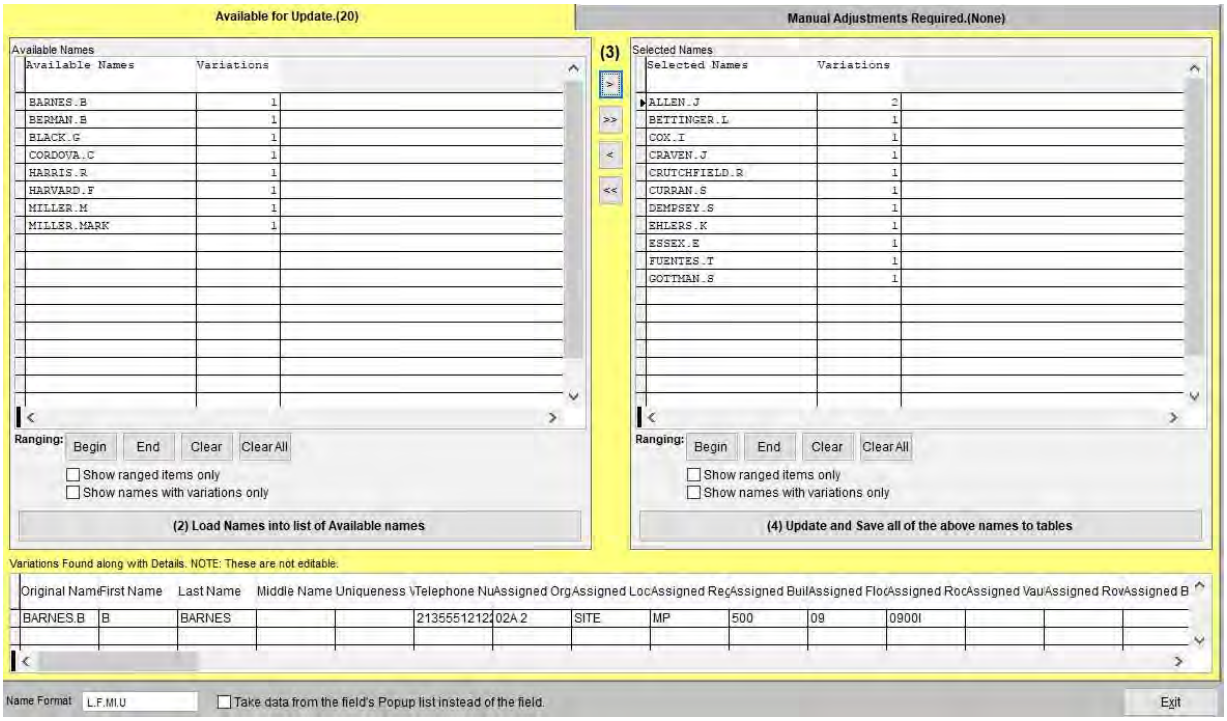
If either of the above is true, then you must edit the original names in the original location, e.g., edit an Asset Location History name in the Asset screen.

Review the Available for Update Area. Select the Names that you would like to import using the Range Feature. Range Buttons are available on the left side of the screen for your convienence. You can also Range using the traditional method such as double-clicking and item.

(3) Click on the right arrow ‘Move’ button to place the names in the list that will be imported as shown below:

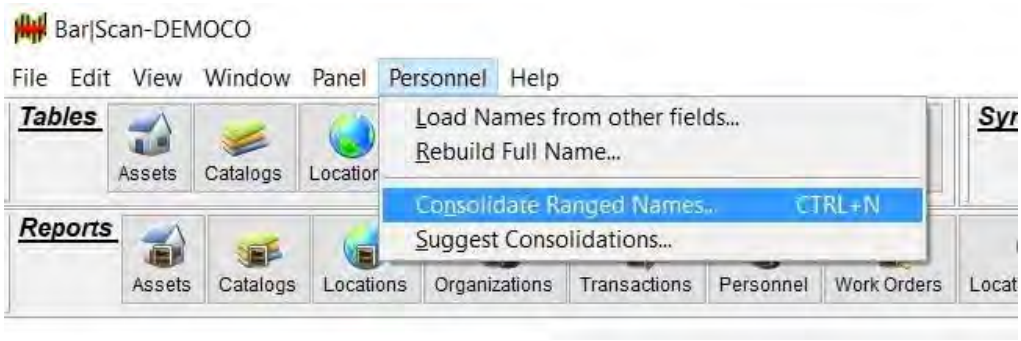


You will now see the names that you wish to import on the right hand portion of the screen as shown in the next image.



When you are ready Click on (4) ‘Update and Save’ button.

Once all of the above has been done, then you can consider doing a consolidation, either manually or using the Suggested Consolidations menu item shown below.



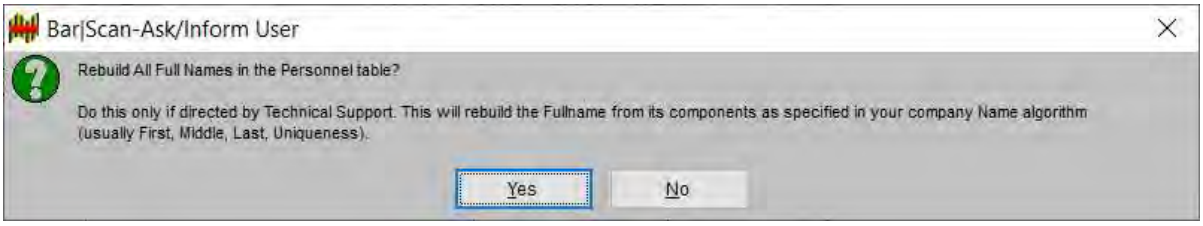
REBUILD FULL NAME

Bar|Scan generates the Full Name by combining multiple separate name fields according to rules that you create in the Company Settings Screen.

You can use this feature to Rebuild the Full Name field from the individual name fields. The names are parsed according the rules entered into the Company Settings Table and then loaded. This can be useful if you decide to change the rules. For example, change all the Full Names from Last then First name to First then Last name.

When you have the Personnel table open, the Main Menu changes slightly, so that the Personnel Features are listed next to the Help as shown below.

Next select Rebuild Full Name to begin the process. You will be asked if you wish to rebuild the all Full Names as shown in the window below. Select Yes if you wish to continue.

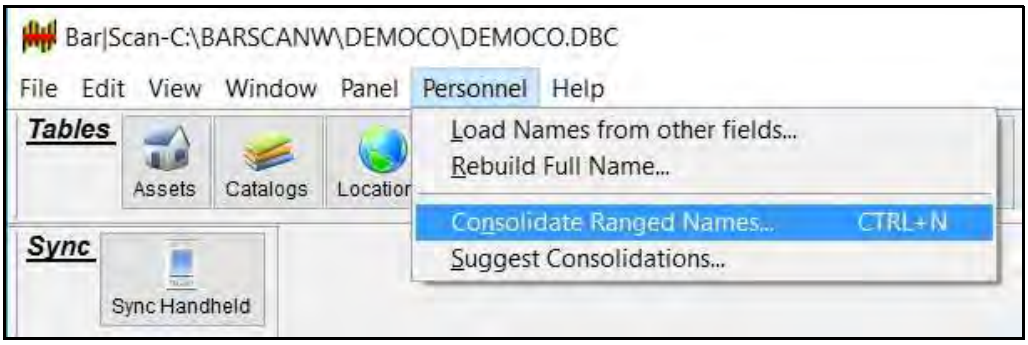


CONSOLIDATE RANGE NAMES

Over time, names of individuals may have been entered differently into the Personnel Table. For example, TOM and THOMAS may have been entered as the first name or a persons name may need to be changed, or last name changes, i.e. marriage.

You can use this feature to Consolidating these names and have the consolidated name replace the full name variations in the main tables, Asset, Transaction, etc.

When you have the Personnel table open, the Main Menu changes slightly, so that the Personnel Features are listed next to the Help as shown below.



1) Range the names that you want to consolidate, including the name that all of the names will be converted to. Ranging a single name will consolidate the variations within that name.

2) Place the cursor on the name that the name(s) will be converted to. If you are consolidating just one name, keep the cursor on the single name.

3) Select the Personnel menu item to consolidate the names.

4) Bar|Scan will then present you with a list of all of the fullname variations of these names that it can find in appropriate tables.

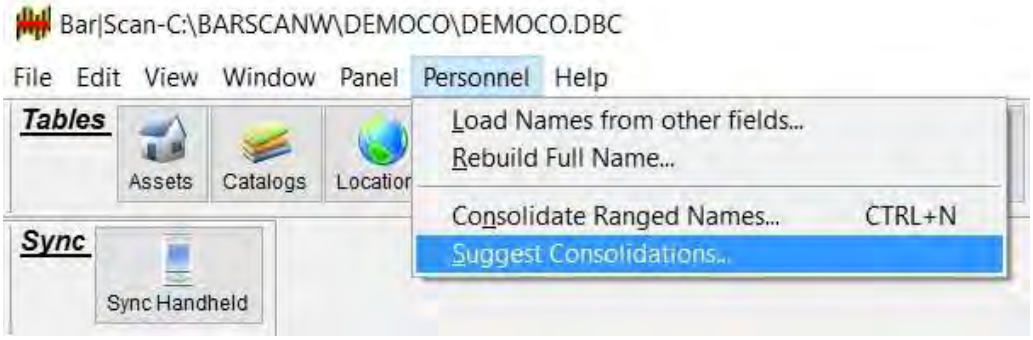
5) Upon your approval, it will replace all the names that it found in all appropriate tables with the single fullname that you selected.

Consolidating Personnel names may result in the inadvertent loss of name data if not done with planning and care. This may be due to operator error, insufficiently complex fullname name formats, different names that convert to the same name, etc. Please carefully examine the list of names and the name that they will become before approving the consolidating operation.

SUGGEST CONSOLIDATIONS

Over time, names of individuals may have been entered differently into the Personnel Table. For example, TOM and THOMAS may have been entered as the first name or a persons name may need to be changed, or last name changes, i.e. marriage.

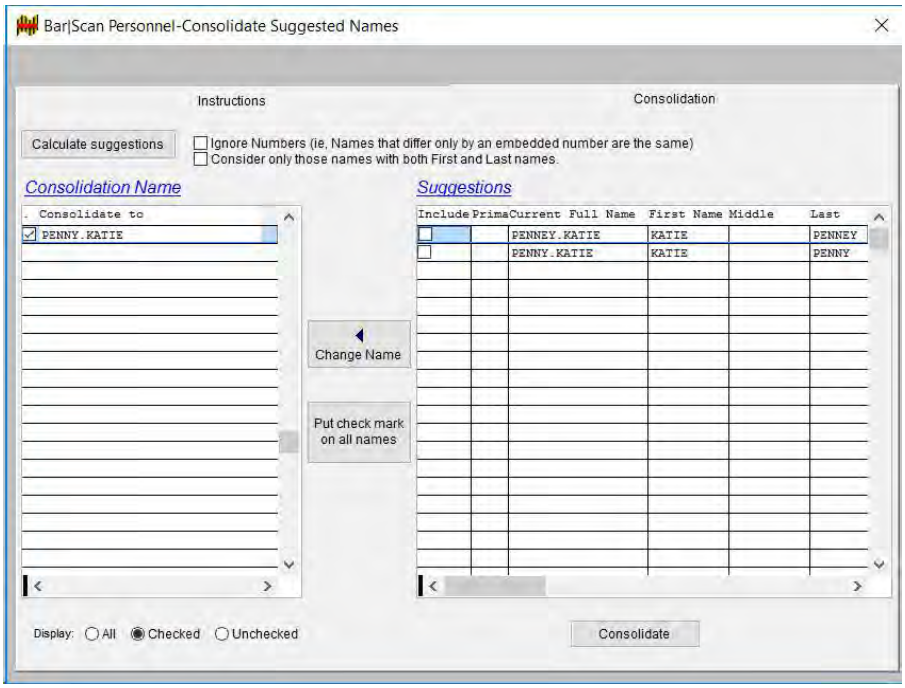
You can use this feature to Consolidating these names and have the consolidated name replace the full name variations in the main tables, Asset, Transaction, etc.



Bar Scan will calculate groups of names to consider for consolidatation when you select the 'Calculate Suggestions' button. It uses a modified SOUNDEX algorithm, so not all suggestions will be valid. Therefore use care when using this feature.

1. To begin, scroll up or down the list of suggested names on the left. When you click on a name it becomes selected. Several suggestions for consolidation will appear on the right.

Here is an example.



2. Examine the list of names on the right. If two or more are actually the same name but entered differently, put a check mark next to each of them. For example, as shown above, is the last name PENNY and PENNY really the same person. The check mark means that it will be included for consolidation.

3. One of the names in the right column you have put a checkmark next to is the name that they all should be consolidated to. Select that name in the right column, then click on the 'Select Consolidation Name' button. That name should appear on the left.

4. Once you are satisfied and decide that you want to consolidate this group, put a check mark on the name in the left column to mark the group for consolidation. You can do this as many times as you want.

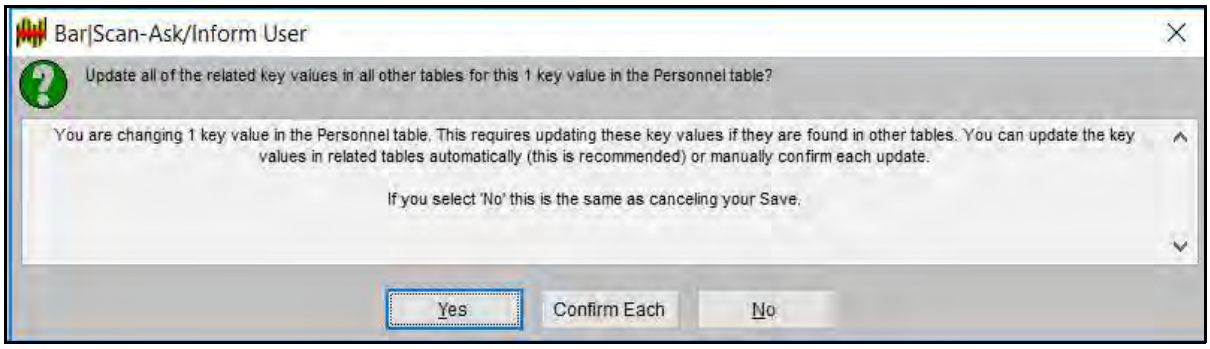
5. Lastly, select the 'Consolidate' button to perform the consolidation for all of the names with check marks.

CHANGING PERSONNEL INFORMATION

From time to time you will want to change, correct, or add information associated with Personnel currently existing in the Bar|Scan system.

While on the Personnel Browse tab, type the first digits of the name, or use the arrow keys or the TAB key to move the highlight bar to the item you wish to change, and press the <Enter> key. Next, select the Edit tab. You may now change any of the information listed on this tab by typing in the new information, or by using the Look up Value feature.

When you have completed and saved the changes, you will be asked if your changes should also be applied to the Asset Table. In most cases you would reply by selecting YES.



DELETING A PERSONNEL ENTRY

This feature completely removes Personnel entry from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

Bar|Scan **will** permit you to delete any Personnel entry currently assigned to an asset. A delete will remove the personnel record from the Personnel Table but it will not remove Personnel Names from the Asset Table or Transaction Table. This is the because the Asset Table contains a history of Locations and their associated Personnel Names. These names did exist in the past even though they may no longer be applicable for present and future selections.

Removing Personnel entries from the system is most often done due to erroneous entries.

LOCATIONS

INTRODUCTION

The Location table in Bar|Scan is optional but very useful. Bar|Scan does not require the information in order to record and maintain asset record information, but you probably want to use at least some of the features.

You can record an asset's physical location directly in Bar|Scan's Asset table without using the Location table. However, this means that locations are not checked as "valid" and you will not have the ability to download locations into your Mobile Device, which can be useful for your inventory.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

THE LOCATION FEATURE

The Location Table maintains a list of valid physical locations for you to check your asset inventory against. Bar|Scan provides the Location table to identify the different locations within your company and optionally assign a bar code room tag for each location. You will want to identify all of the locations within your company which will contain assets.

If you do not wish to maintain this list and you can create just one “blank” location, Bar|Scan will assume that any assets you enter into the Mobile Device or an asset screen are located at the blank location, simply leave that field blank in the Mobile Device also.

Alternatively, you can turn Location validation checking off. This can be done by selecting from the Main Menu, File, then Company . . . ▸, Housekeeping . . . ▸, Set Transaction Validation Messages, and disabling the appropriate error message.

When you initially start using Bar|Scan you will have to determine the location scheme you would like to use and whether you would like to use the room tag feature.

Bar|Scan provides three different types of Locations.

1. Site Locations - Most common type of Location - used for buildings
2. Pallet Locations - used in most warehouses
3. Vault Locations - used for vaulted types of storage

The Site Location in Bar|Scan provides four *levels of location*. We have named them Region, Building, Floor, and Room. You will want to develop a location scheme which will cover all relevant locations within your company.

The Pallet Location in Bar|Scan provides five *levels of location*. We have named them Building, Row, Bay, Slot, and Level.

The Vault Location in Bar|Scan provides five *levels of location*. We have named them Building, Vault, Row, Bay, and Level.

All of the three available types of locations have fields for: a Room Tag, a Location Description, an Organization, and the Square Footage.

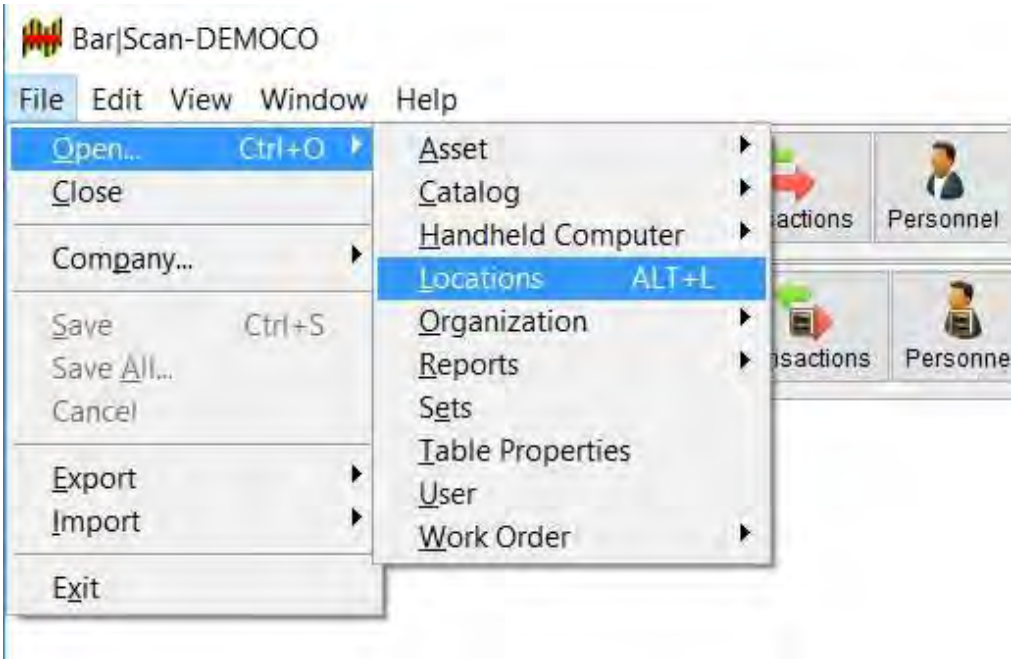
Important: You do not need to use all levels of location. If you determine that you would like to track your assets only to the floor they reside on, but not to an individual room, you may do so. This is done by only completing the levels you wish to track and leaving the others blank.

The selection of these level titles is based on the most common industry practice. However, you may use a scheme which is appropriate for your particular organization. The important thing about a location code scheme is; it will precisely locate any and all of your assets in all of your company facilities.

As with other fields in Bar|Scan, you can rename these titles to best suite your location scheme.

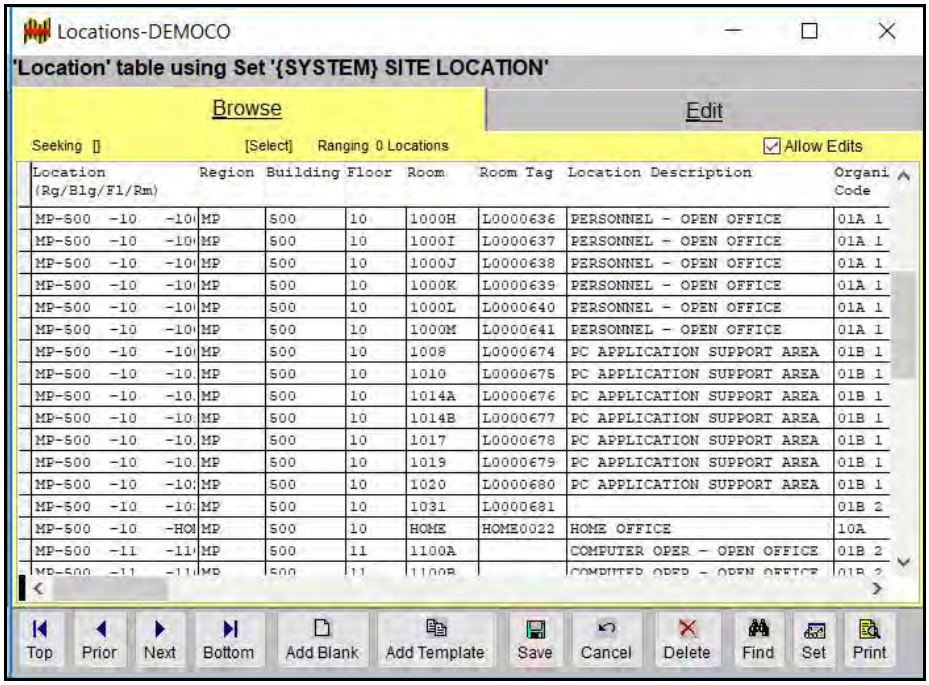
THE LOCATION TABLE

When you want to view, change, add, or delete Locations you will need to open the Location table. From the Main Menu, select File, then Open . . . ▸, then Locations . . . ▸ as shown on the following example.



Or, if you have selected to add the Tables Tool Bar to the Main Menu, you can click on the Location icon which is shown below.

No matter which method you choose to open the Location table, you will see a table similar to the following.



The Browse tab is selected by default. This tab permits you to select Location(s), then you can add, change, set, and view the different Location entries on the Edit tab.

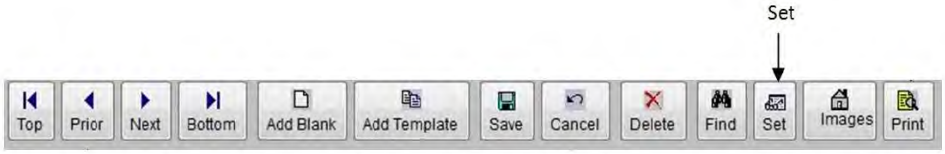
Note that the Locations listed in the above screen meet the criteria previously established by the SET feature. In the above example, the Set that was chosen was Site Location.

You may press the Esc to return to the Main Menu.

You can find specific instructions about cursor movement keys, function keys, and how to operate the look up windows, in *Chapter 5 - Operating the System*.

CREATING AN ORDER AND FILTER - THE SET MODE

On the Location table, the Browse panel is selected by default. The Location information on the Browse panel can be sorted by any field, go to the first column on the left, press your right mouse button, and then select the words “Order By” that will be displayed, or select the Set button on the tool bar as shown below.



This feature will give you the ability to look at all of the Locations; pre sorted the way you specify.

The SET feature works in conjunction with adding, changing, deleting, and viewing to allow you to identify a smaller, more manageable group of locations from which to select, e.g., locations by building will show you all of the rooms in a particular building, and if you have more than one building, will then show you all of the locations in the additional building(s).

As the number of locations on your system increases it becomes more time consuming to look through the entire list of locations displayed on a look up window.

SET enables you to define an “order" or to “sort”the items listed. Use this feature to sort your list in the order which you feel is most effective.

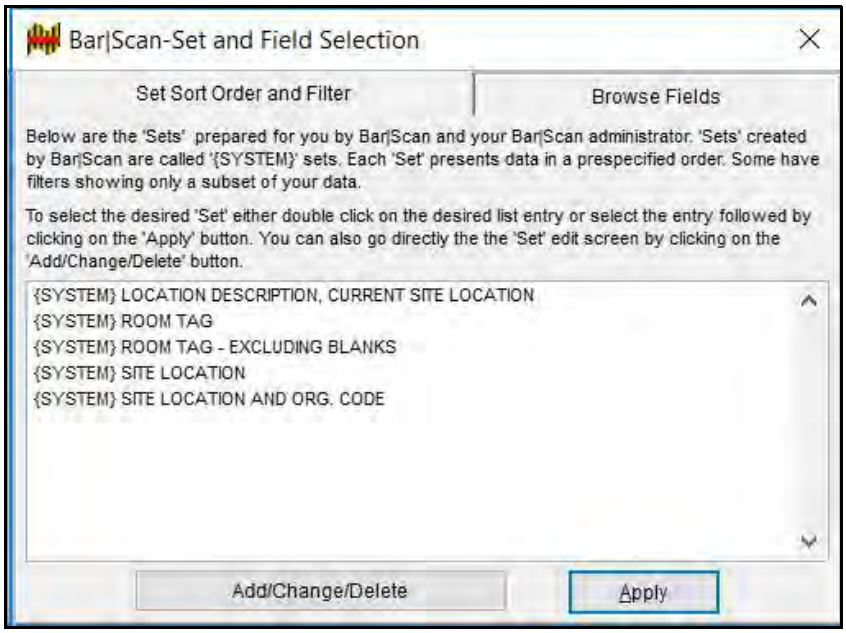
SET also enables you to define a "filter" which will reject the locations which do not meet your specifications. SET provides several "filter" items. However, adding a filter to your sort will slow down the initial query process, and may cause your table to open much slower if the last Set that was used before closing the table had a filter on it.

Further, you can define a "range" for a filter item by selecting and marking a block of items that you wish to filter out.

Finally, you can identify more than one filter and/or range to further reduce the number of locations to search.

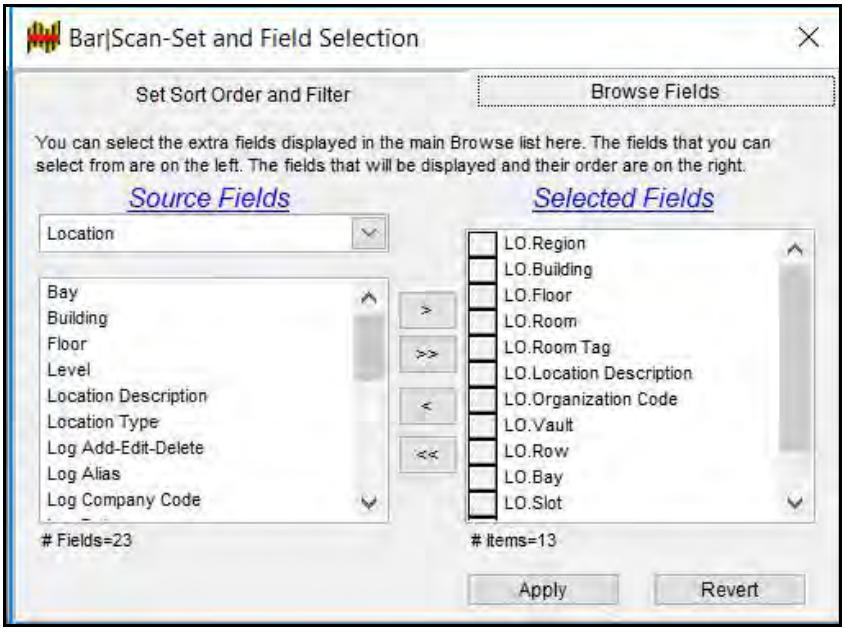
Because Set offers almost endless possibilities for identifying groups of locations, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with Set will NOT cause any change to the information recorded for any location or asset. It merely specifies the amount and the sequence of location selection lists.

When you select Set, the following screen will appear.



This tab shows a list of Sets that are already created in Bar|Scan. If you would like to view the fields that will show up as columns when you are on the Location Browse tab, select any of the Sets, and then select the Browse Fields tab.

The Browse Fields tab will look similar to the one below.

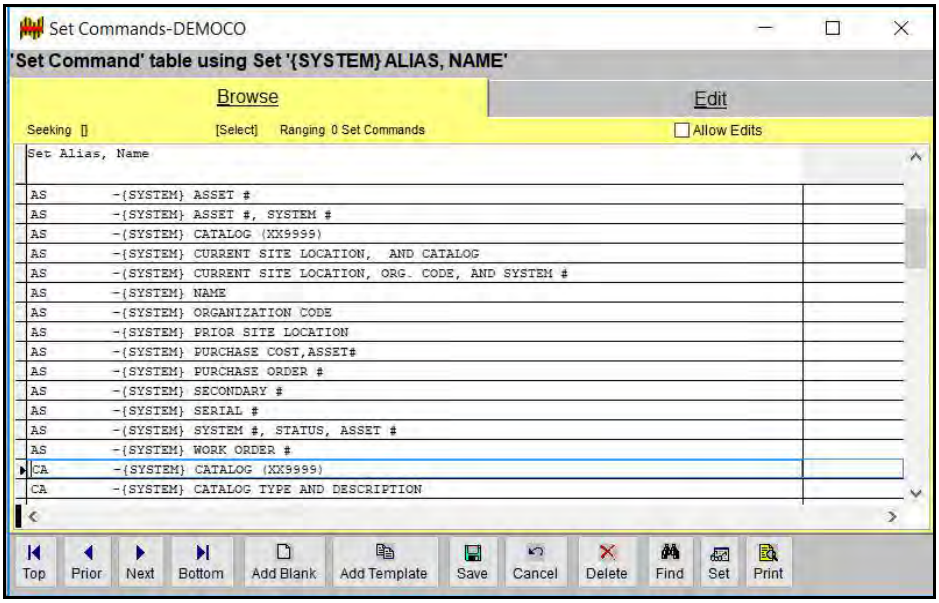


On the left side of this screen there is a list of all of the available fields for the Location table that you may display in your Sets. On the right side of this Browse Fields tab, you will see the current fields that are displayed for each Set. These fields are displayed for all of the different Sets, with the Set pertaining to only the column by which the list is sorted (the first column).

The Set feature is a powerful tool, and should be experimented with.

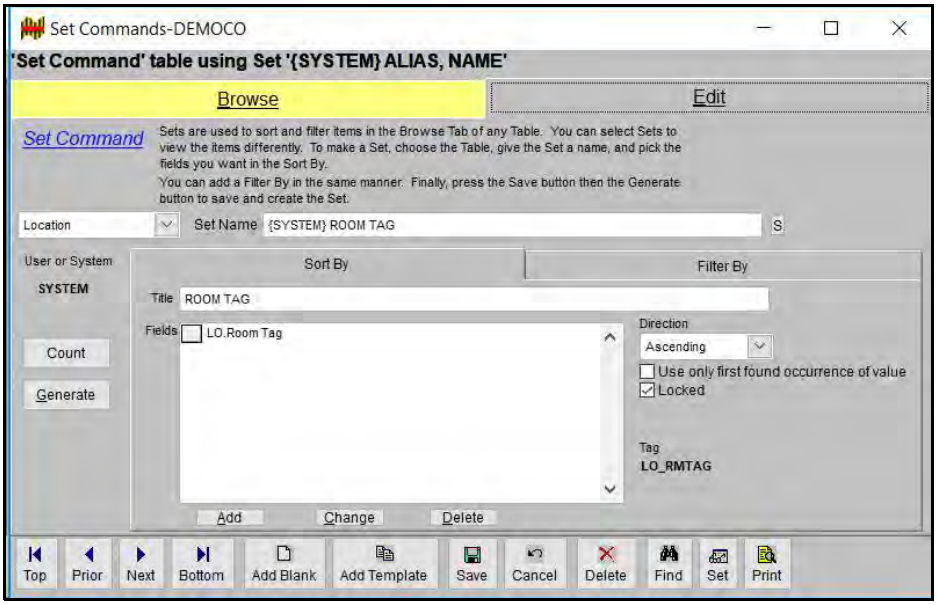
Remember that the Set feature works in combination with the F4 (Range) key, allowing you to make powerful, global edits with a minimum of keystrokes.

From time to time, you may wish to add a new Set. When on the Location table, select the Set icon from the tool bar. When the Set and Field Selection table appears, select a Set, then select the Add/Change/Delete button. You will be shown a Set table similar to the following.



Select from this list, a Location Set, that is most similar to the one you want to add, and select the Add Template icon on your tool bar. Then, select the Edit tab.

You will be shown an Edit tab similar to the following.



Note: System Sets may not be changed. If you want a Set similar to a System Set, use that Set as a template for your own. In order to create a new Set, you must have exclusive use of the files (be the only person in this Bar|Scan company database).

Type in a new Set Name. Type in a new Title (this should be similar or identical to the Set Name). Go to the Fields box, and Change the fields listed to your new choices, and Delete any additional fields that are not necessary for your new Set.

Save your new Set. Close any other tables that you may have opened, with the exception of the Bar|Scan Main Menu.

Then, select the Generate button. **Only** after the Set has been saved and Generated, may you use the new Set.

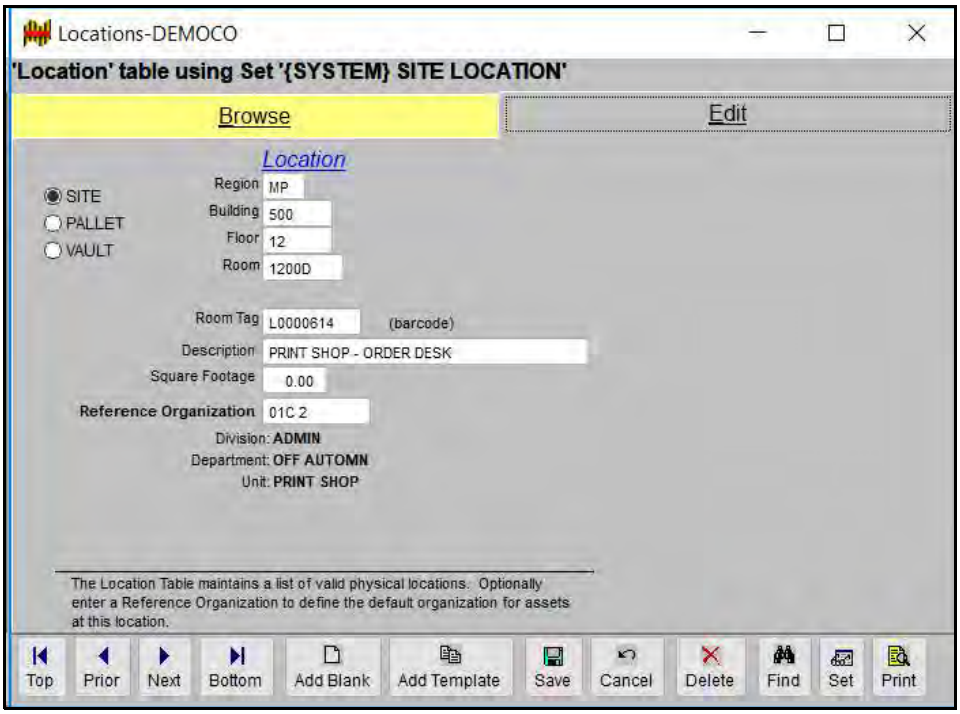
Close this table. Open the Location table. Select the Set icon from the tool bar. Select your new Set. Your locations will be sorted by the criteria you specified.

Displaying a Location Table Entry

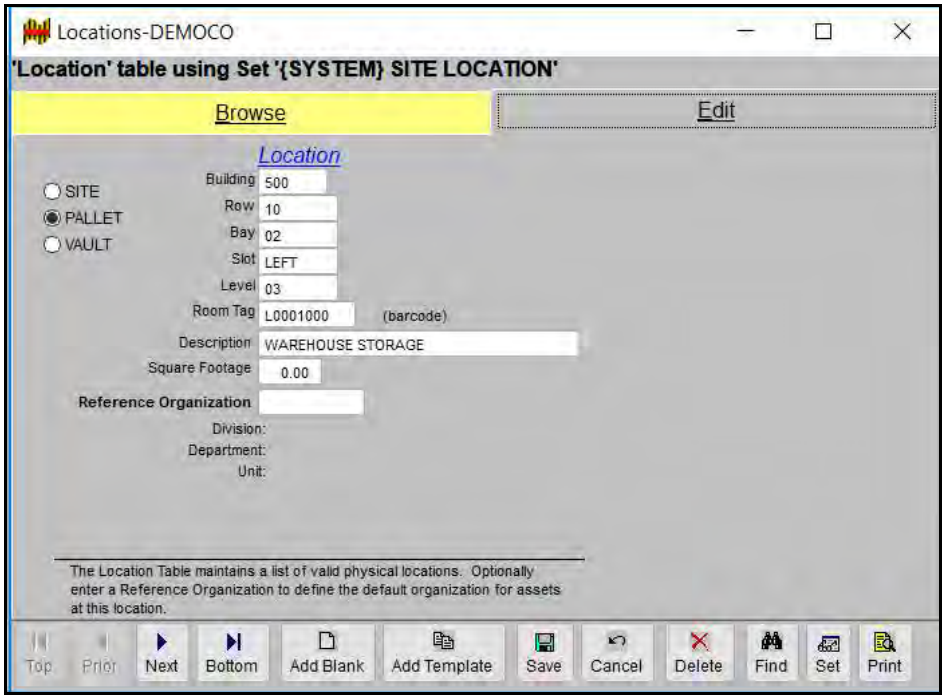
The Location Edit tab permits you to display the current information about a particular Location. From the Browse tab, choose a Location and press ENTER. Then, select the Edit tab. The selected entry will be displayed.

Selecting the Type of Location

You will need to select the type of Location that you will be using. The next three screens show the three types of locations that are available as default types in Bar|Scan. Select a Site location while on the Browse tab, then, select the Edit tab. If you have chosen a Site location, the information for the Site Location that you have selected will be displayed on a screen similar to the one below.

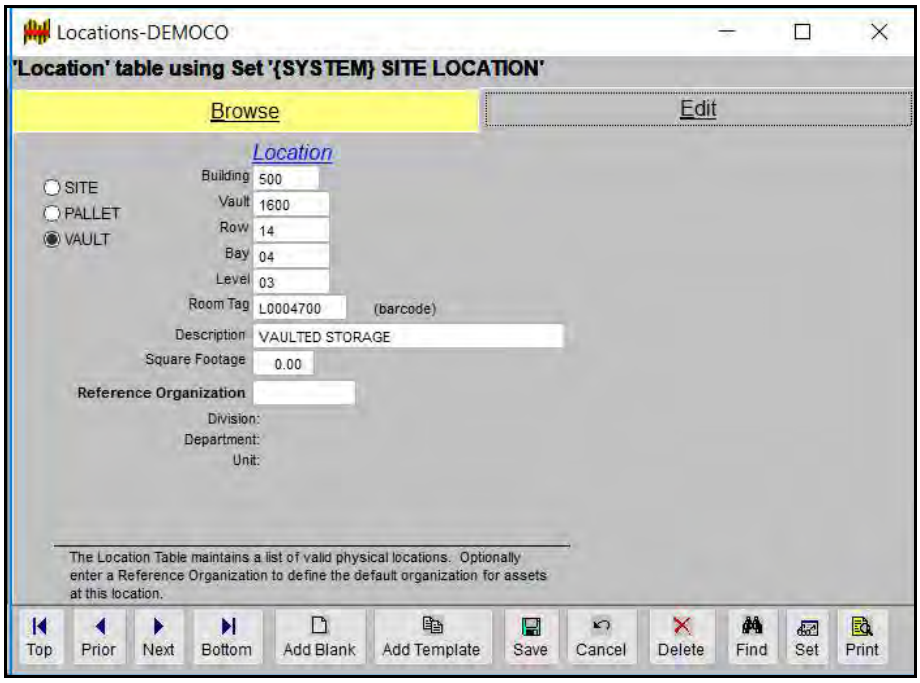


If you have chosen a Pallet location, the information for the Pallet Location that you have selected will be displayed on a screen similar to the one below.



Notice that there are now five levels of location, and the names of the location fields have changed.

If you have chosen a Vault location, the information for the Vault Location that you have selected will be displayed on a screen similar to the one below.

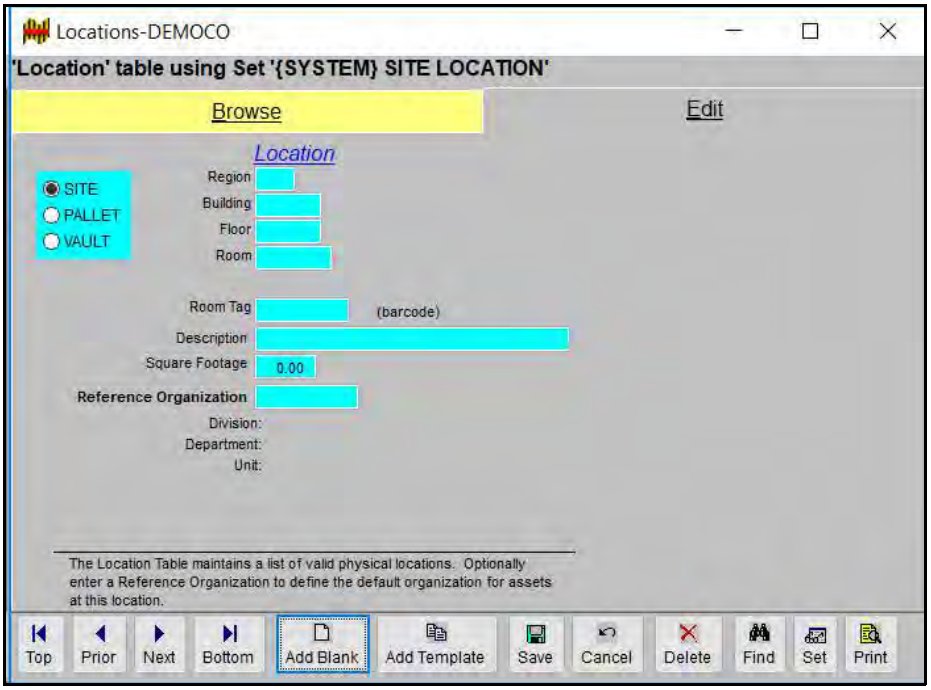


Notice that the manes of the location fields are different for Vault locations, than they are for Site and Pallet.

ENTERING THE NEW INFORMATION

Add Blank and Add Template both allow you to enter new Location(s) into the Bar|Scan system.

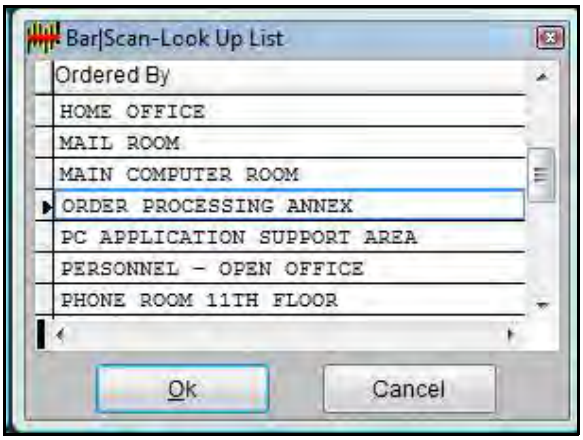
While on the Location Browse tab, move the highlight bar using the cursor movement keys or mouse to go through the list. When the desired entry is found, move the highlight bar over it and press the <ENTER> key, selecting a location. To select the Add Blank Item or Add Template item, click their corresponding button on the tool bar. Next, select the Edit tab. The information for the Location that you have selected will be displayed on a screen similar to the one below.



You may use the arrow keys, the <Tab> key, the mouse, or the <ENTER> key to move to the different items on the screen.

Each of the entry items has an associated look up window to assist you with your entry.

To view the Location information that is currently entered into your system you may right click while on the desired field or press the F5 key, and select Look up Value. You will be shown a look up window for that particular field, similar to the one below for the location description.



The following sections in this chapter describe each of the different items on the Location Display Screen and provide instructions on how to enter the information.

See *Chapter 5 - Operating the System* for general instructions on the use of the different features and keys.

Pressing the Esc key returns you to the Main Menu. Note if you have pending changes or deletions you will be prompted to cancel or save these changes or deletions before you will be allowed to exit the Location table.

The Location Information

As previously mentioned, one of the important features of Bar|Scan is the ability to define a specific physical location for each asset.

The Location information consists of three sections, a physical location corresponding to blueprint or drawing, an associated bar code room tag, and a detailed location description. In the following paragraphs we will discuss the first section - physical location.

Bar|Scan provides three different types of Locations.

1. Site Locations - Most common type of Location - used for buildings
2. Pallet Locations - used in most warehouses
3. Vault Locations - used for all vaulted items

The Site Location in Bar|Scan provides four *levels of location*. We have named them Region, Building, Floor, and Room. You will want to develop a location scheme which will cover all relevant locations within your company.

The Pallet Location in Bar|Scan provides five *levels of location*. We have named them Building, Row, Bay, Slot, and Level.

The Vault Location in Bar|Scan provides five *levels of location*. We have named them Building, Vault, Row, Bay, and Level.

All of the three available types of locations have fields for: a Room Tag, a Location Description, an Organization, and the Square Footage.

The location code entries are designed to be used in a logical hierarchy. To demonstrate this concept, let us look at the four levels contained in the Site type of location. The lowest level (the Room identification) is located within the next higher location level (the Floor identification), which is located within the next higher location level (the Building identification) which is located within the highest location level (the Region identification).

Note that the number of levels used, the definitions of the different levels, and the actual codes entered are defined by you and should be developed prior to entering assets into the Bar|Scan system.

Room Tag

A Room Tag is a bar code label which identifies a specific location. The label is usually affixed to a door jamb leading into the particular area or room.

The Room Tag is used in lieu of the other location codes once a particular location has been identified. This will save considerable time when you take inventory, i.e., you will only need to scan the Room Tag rather than entering the different codes.

Here is how it works for any of the different types of locations: The first time a particular set of location codes is entered, a Room Tag number is assigned which will be used in place of the codes in the future. After that, when a Room Tag number is entered into the system, the location codes will automatically be displayed for you.

If you wish to enter a new Room Tag number, first identify a set of location codes. Then type the Room Tag number characters and press ENTER. Most often however, Room Tag numbers will be entered using the Mobile Device.

Note: If you are in a warehouse, you may not need to use a bar code room tag, rather, you can enter a room tag number and print the bar code on a report which then can be applied or laminated to the racking.

Bar|Scan can generate and print labels to almost all Avery label stock. Bar|Scan's report generator has a label generating function built-in. A sample system report can be found by opening the All Reports Icon.

Location Description

Bar|Scan permits you to enter a lengthy Location Description for the physical location codes that identify a particular location.

This is useful to further describe Locations, especially when you wish to download locations into your Mobile Device or print this entry on **Location Menu Boards**.

The Location Description is used in the Asset table, and therefore, Assets can be ordered or filtered by this description. However, Bar|Scan makes no use of this information when working with the Mobile Device. It will not use this information in a way as to change Mobile Device transaction information.

The Reference Organization

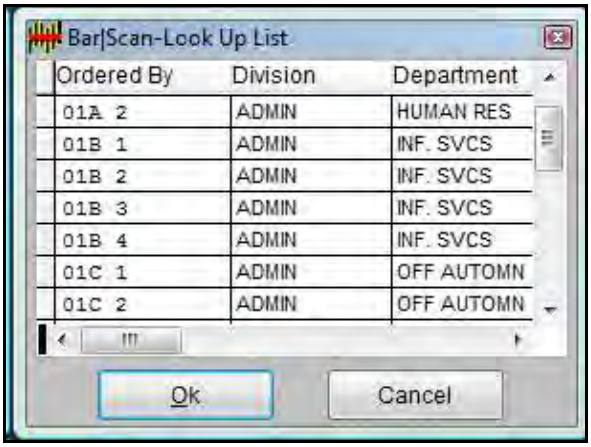
The Reference Organization consists of the same information as described earlier in the previous chapter, a code that is linked to a particular Division, Department, and Unit.

Bar|Scan permits you to enter any organizational information that already exists in the Organization Structure File.

This is useful to further describe Locations, especially when you wish to download this information into your Mobile Device or print this entry on **Location Menu Boards**.

The fields have associated look up windows to select from. Right click or press F5 while on the desired field, and select Look up Value to display the look up window.

When you view the look up window for the associated Organization Code, you will see a window similar to the one shown below.



Begin typing the characters for the desired Organization, or move the highlight bar using your choice of the cursor movement keys to the desired Organization, to highlight it.

When you have the desired entry highlighted, press the <Enter> key, or select the Ok button, and the Organization information will appear on the Location table.

Care should be taken when deciding to associate an Organization with a particular location. Because the location is now entirely consisting of items belonging to a certain department or division, does not mean that this location will always hold only items for that department or division. This may be especially true with warehouses.

While you may associate the Organization with the Location, you want to ensure that the Organization information will not be repeatedly changing. For instance, floor three of your building may be for payroll, and has been that way for many years. You do not plan on moving the department, and they are responsible for all of the assets on their floor. In this instance, it may be a real time saver to include the Organization as part of the Location.

Whereas, in a warehouse building, row one, bay two, slot left, level two, may be filled with items that belong to the All American Company today. Next week, you may need more space to accommodate this customer, move their items to a larger location, and fill this bay with another company's assets. In this instance, you would not want the Organization Code associated to the Location. When the inventory is being done, the Organization Code can be entered into the Mobile Device, linking it to the assets themselves. When the assets move, the Organization Code will remain the same.

Using the Reference Organization Without the Mobile Device

You can use the Reference Organization to populate the Asset table without collecting the Organization Code with the Mobile Device. To perform this operation, select File, then Company . . . ▸, Housekeeping . . . ▸, Table Integrity. Make sure the company you wish to do this on is selected, then check Initialize Blank Organization Codes for Assets, and select the OK button to begin the process.

ENTERING A BLANK LOCATION

If you do not wish to have Bar|Scan validate the Location as it is being uploaded from your Mobile Device, you may do so by entering a blank location record, and saving it. Then select this blank Location for all of your transactions.

To resume validation, you must delete the blank location record.

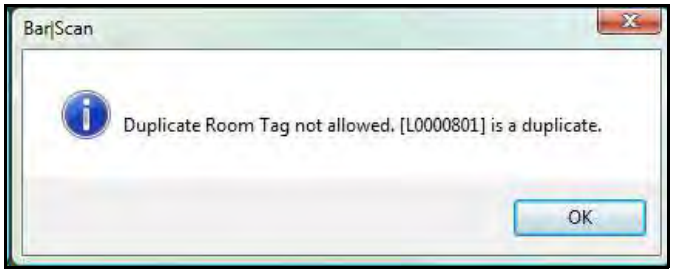
CHANGING LOCATION TABLE INFORMATION

From time to time you will want to change, correct, or add information associated with locations, room tags, or location descriptions currently existing in the Bar|Scan system.

Important: You can change location information even if it is being used by an asset in the Asset File. Obviously caution should be exercised when using this feature. Because the Asset File contains a history of locations, changing a location will not automatically change locations in the Asset file.

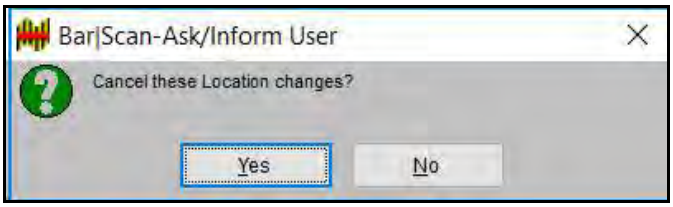
With the Location that you selected displayed on the Edit panel, you may choose to type in the new information, or right click or press F5 while on the desired field, and select Look up Value to assist you.

If you type information that causes a conflict, e.g., you attempt to change a Room Tag to one that already exists for another location, a dialog box similar to the following will be displayed.



Note: the location on the Edit panel, should still be highlighted to show that there are pending additions or changes. As Bar|Scan has not saved the new information because of the conflict.

To confirm this, if you hit Esc, or try to close this box at this point, you will see a dialog box like the one below.



Bar|Scan cannot save this information, until the conflict has been resolved.

After you have made your changes, save the information by pressing the Ctrl + S key combination, or click on the Save button on the tool bar.

Press the Page-Up key or the Prior Location button from the tool bar if you want to change the prior location. Press the Page-Down key or the Next Location button if you wish to change the next location. Remember that locations are ordered and filtered according to your Set criteria.

Global Changes of Locations

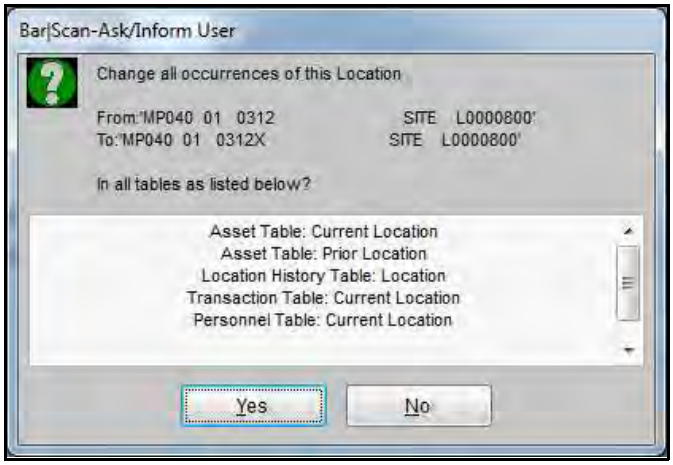
The question that is asked asked is: *Can I edit a location field or room tag in one place and have Bar|Scan change it for me globally in my company?*

The answer is yes you can. Changing location fields and Room Tags is not a normal part of a typical inventory but we have made some changes to Bar|Scan to make this task easier. Please be sure to read this note carefully before proceeding, especially if you are sharing the location table among companies (table properties).

Bar|Scan has the ability to easily make global changes to location fields, including the room tag. The new value of a location (including its room tag) can be made to propagate to all like locations in the current company. This feature is available only to Master Users. All the Master User need do is edit the location field to be changed and then save it. Upon saving the change the Master User will be prompted to confirm the change. Bar|Scan will then check all Assets, Transactions and Work Orders for that location and then change it to the new value.

If you are doing a range you will be prompted for verification on each location you have changed. It is important to realize that the "Default Requested By" and "Default Destination" location for Work Orders specified in the User table are NOT changed, neither for the current user nor any other user. These fields can and should vary with both user and company and should not be changed based on one company or one user.

After saying 'Yes' Bar|Scan will scan for occurrences of this location in all tables that access this location. For those tables that have it, it will be in the list. If this location does not occur anywhere else, then you will not get any of the following prompts, it will just save it. Below is the first dialog boxe that you would see:

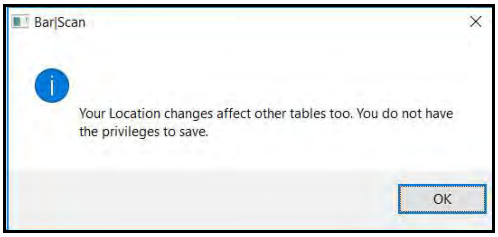


It is also important to note that if you are sharing locations between multiple companies that this automatic change is done only on the current company, not all companies using the location changed. To change the location in the other companies you will have to change them manually using standard ranging and editing techniques.

If you select 'No', you get this dialog box. You only get it if you are a Master User. I would not have added this except it is the only way to do certain types of Location edits when trying to clean up locations.

If you see the message: Your changes affect other tables too

If a user receives one of the following error messages "Your Location changes affect other tables too. You do not have the privileges to save."



This message only occurs when one of the following are true:
1. The user is not set as a master user (administrator) in the User Table.
2. The user is editing an existing Location or Person in the Location or Personnel screens.
3. The Location or Person the user is editing is already being used somewhere else, such as the Asset table.

Conversely, this message will not appear if the user is a master user, they are adding a new Person or Location, or, if editing an existing one, the item being edited has not yet been used anywhere else. It doesn't matter whether or not the tables are shared with other companies.

Finally, you will get this message if you do not have the necessary privileges to get the confirmation dialog.

DELETING A LOCATION TABLE ENTRY

This feature completely removes a Location entry from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

Removing Location entries from the system is most often done due to erroneous entries.

Bar|Scan **will not** permit you to delete any Location entry that is the current Location for an asset. You will need to first change all assets and transactions that are using the Location entry that you wish to delete.

Go to the Asset table, and use the Set feature to display the assets by location. Type in, or go to and select any and all assets using this location, using the Range feature if there is more than one. Correct the information to display the correct location for these assets.

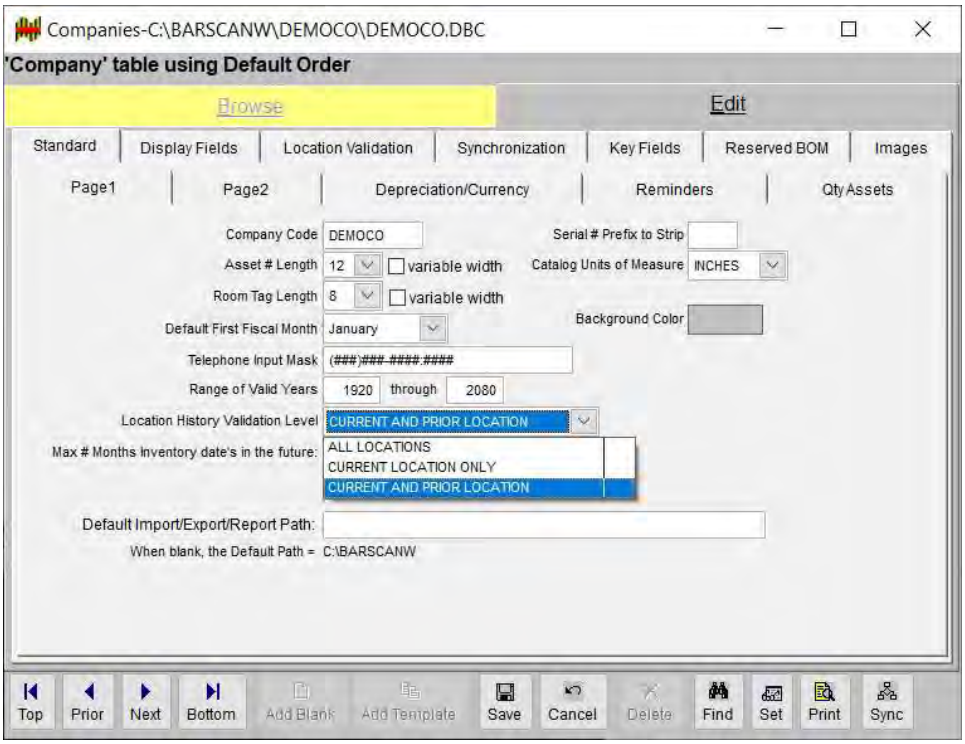
Also, correct any of the transactions that use this location so that they refer to the correct location.

Then, in the Location table, select the location(s) that you would like to delete using the F4 (Range feature). Then press the Ctrl + D key combination, or select the Delete Selected Location button from the tool bar. You will see a dialog box, asking you to confirm the deletion. If you confirm the deletion by selecting Yes, then you will again be asked to confirm your choice. If you again select Yes, the selected location(s) will be immediately deleted.

CHANGING LOCATION HISTORY VALIDATION

A reminder: Bar|Scan maintains a history of all of your asset inventories including manual changes. This asset location history is validated against multiple supporting tables such as the Location Table. If you have a high level of scan activity or have a large number of edits to the supporting tables, activities such as creating new Set Commands or performing a Table Integrity may take a long time, or you may just not be concerned with older location information. You can choose one of three amounts of validation that you wish Bar|Scan to perform.

Open the Company Settings Screen if you wish to modify the Location History Validation Level.



REPORTS

INTRODUCTION

The Bar|Scan Report feature provides many different predefined reports from which to select. These are called System Reports. You can also create your own reports.

As the number of assets recorded in the Bar|Scan system becomes very large, you may want to report on only a selected group of assets. Bar|Scan makes it easy to select only certain groups of assets so only the desired information is included in a report.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

CREATING YOUR OWN REPORTS

You can easily design your own reports, i.e., define the sort of the information, edit column headings, and specify the information contained on the report. You assign a name to your report and the title will be displayed on the Browse panel.

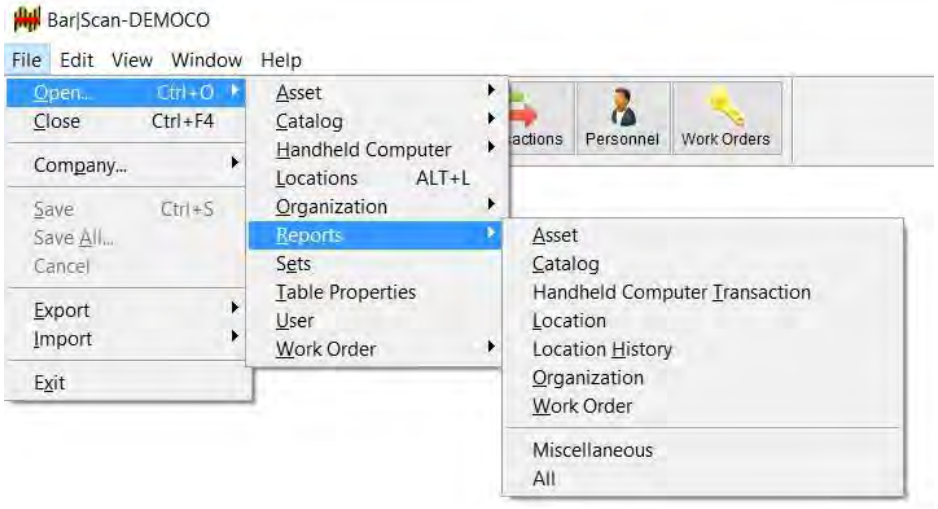
A simple example would be a report showing all of the assets on a particular floor or in a particular department, listed in order by the Catalog Type and Description.

BAR|SCAN SYSTEM REPORTS

We have created several useful reports for you. These are called System Reports. You may print all of these reports, but unlike the reports that you create, System Reports cannot be changed unless you uncheck the locked button. Even then, we do not recommend that you change them since they are “refreshed” when you upgrade Bar|Scan to a new version. However, you can use System Reports as templates for any new reports which you create. These new reports can then be changed. All System Reports begin their name with "{SYSTEM}.”

THE REPORT FEATURE

When you want to view, change, add, or delete Reports you will need to open the Reports table. From the Main Menu, select File, then Open . . . ▸, then Reports . . . ▸, then a type(s) of a report as shown on the following example.



You have your choice of nine types of reports shown on the right-hand drop down menu above. If you want to choose more than one type of report, select the last option, All. This item will allow you to view a list of all of the reports that are currently in your Company Database.

You may create (add) a new report. Or, you can change, delete, view, or print an existing report.

The first selection, **Asset Report**s, has a number of {System} reports and you can create new reports of your own design. Bar|Scan will enable you to print any of the fields that exist in your Asset and all related tables.

The second selection, **Catalog Report**s, has a number of {System} reports that enable you to print either individual Catalog Sheet pages, a list of the items currently contained in the Catalog table, or a Bar Code Menu List. In addition, you use the {System} reports as templates to create reports of your own design.

The third selection, **Handheld Computer Transaction Reports**, produces reports from the Transaction table. The Transaction table holds items which have been transferred into the system from the Mobile Device. You can use any of the {System} reports as they are, or use them as templates to create your own reports.

The fourth selection, **Location Reports** enables you to display or print a list or bar codes representing all of the different locations. You may print their descriptions and the referenced organizations. These reports are useful during a physical inventory. By scanning the bar codes on these reports, you can avoid manually typing the locations into the Mobile Device. You can print the {System} reports, or use them as templates to create your own.

The next selection, **Location History Reports**, produces a list of assets with every location they have ever been recorded at, from a location point of view. Use these reports to answer questions like "How many assets have ever been in this location?" You can print the {System} reports, or use them as templates to create your own.

The next selection, **Organization Reports**, enable you to display or print all of the organizations, and their associated information. You can print the {System} reports, or use them as templates to create your own.

The next selection, **Work Order Reports**, enable you to display or print Work Orders. You can print the {System} reports, or use them as templates to create your own, with the exception of the two custom reports which will be covered later in this chapter.

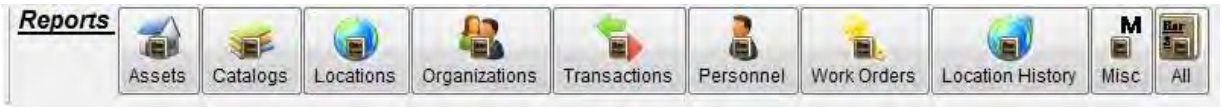
The next selection, **Miscellaneous Reports**, allows you to add new reports that do not fit into any other report type, for example, a list of conditions. You can print the {System} reports, or use them as templates to create your own.

The next selection, **All**, enables you to display, change, add, view, or print all types of reports. This selection enables you to select from all of the reports in your Company Database.

Beyond these reports, you can add custom Reports to any and all of the report types. Custom reports are created (specifically for your company) by a computer programmer who is familiar with the Microsoft Report Design Tool.

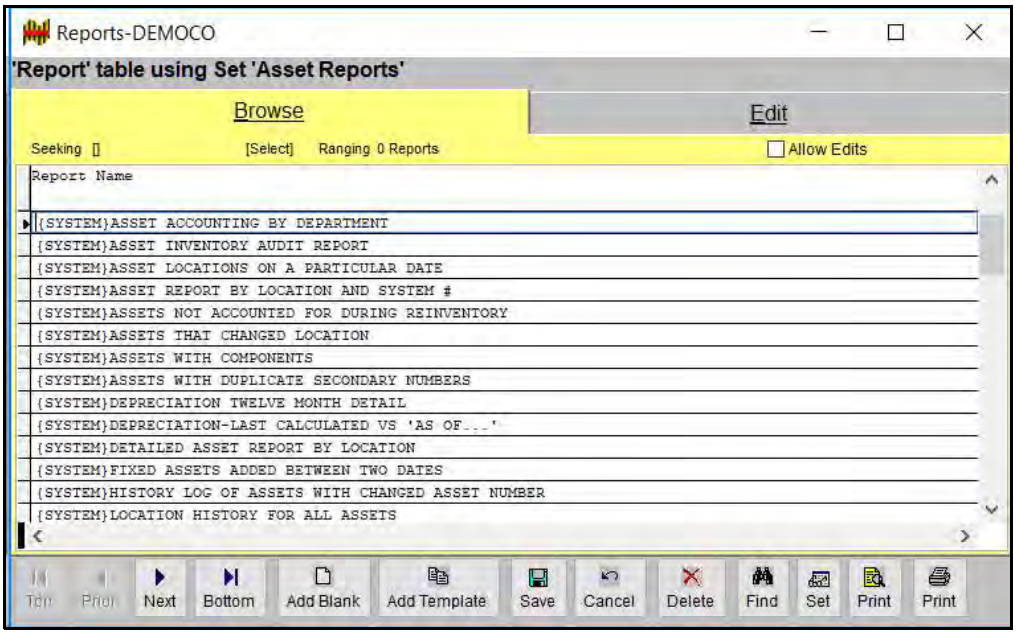
We have added custom reports to the Work Order module for you to evaluate this feature. One custom report is called the GFS Work Order, and another is called Warehouse Pick List. You may print these reports at any time. But, you **cannot** use these two reports as templates or change them in any way, except that you may add a filter. All other attempts to change these two reports will not allow them to print properly.

If you have selected the Report Toolbar from the View feature, then you can select the type of report that you want to see, add, change, or print by clicking on the respective icon. The Reports Tool Bar is shown below.



Note: When you place your cursor over an icon without pressing your mouse button, you will see the balloon help that will tell you which type of report the icon is for.

No matter which type of reports you select, you will see a Report table similar to the following.



The Browse tab is selected by default. This tab permits you to select Report(s), then you can add, change, delete, set, and view on the Edit tab.

The information on your browse tab will vary, depending on the type of report you select.

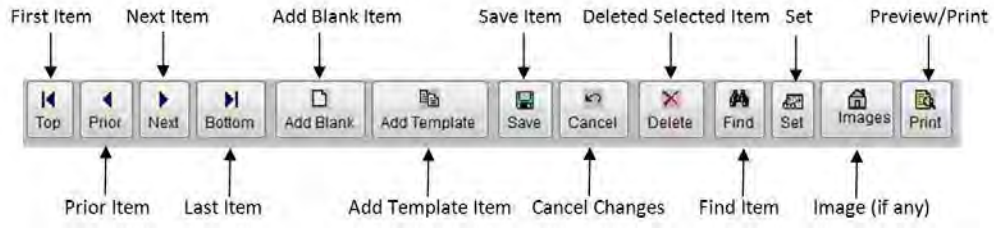
The reports are listed by table. Shown above are Asset reports. The report names appear in alphabetical order.

While the Set button does appear in the tool bar for Reports, it is highly unlikely that you would ever want to view the reports by any other order than report name. But, you can view the reports for different tables by selecting the Set button.

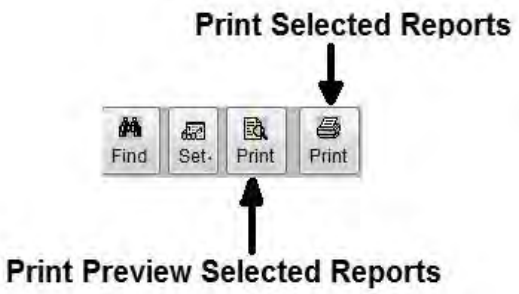
When creating a new report, always try to select a similar report from the appropriate table to use as a template.

THE TOOL BAR

The following items are all found on the tool bars of any of the tables. When you place your cursor on them, but do not click, you should be able to see a corresponding balloon help, that will tell you what the button is as shown below.



Note: In addition to the items on the tool bar as shown above, the Report table has two additional buttons as shown below.



CREATING A NEW REPORT

The number of possibilities for different reports is essentially endless. You will likely receive requests from different individuals in your organization and you will want to design new reports for them.

The Add Blank and Add Template buttons on the toolbar enable you to design your own reports. Bar|Scan provides many {System} reports from which to choose. It is expected however, that you will want to customize the {System} reports to satisfy your particular company's needs by using them as templates for your own reports.

To select Add Template Report, or Add Blank Report, you can click on their corresponding button on the tool bar, or use the pull down menu Under Panel, and select Add, then select Template or Blank.

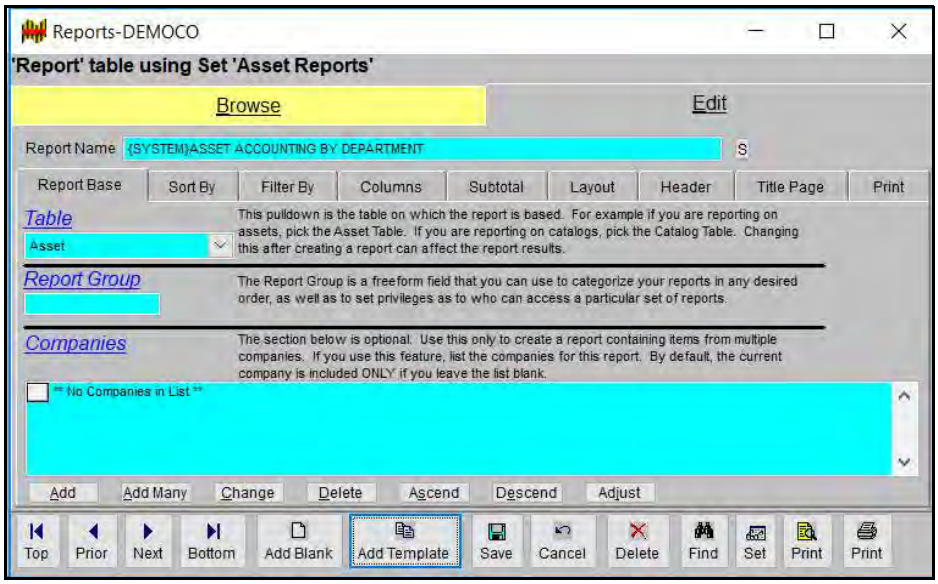
Add Blank will enable you to create the new report from scratch. No existing information will appear on the panels.

If you choose Add Template, you may choose an existing report to use as a template for the new report while on the Browse Tab.

While on the Reports Browse tab, move the highlight bar using the mouse or cursor movement keys to go through the list. When the desired entry is found, click on it to move the highlight bar over it and press ENTER, selecting a Report.

ENTERING THE NEW INFORMATION

After you have selected a Template report, the information will be displayed on the Edit tab, which will be similar to the one shown below.



Many of the entry items have associated look up windows to assist you with your entry. The following section will describe each item on the Report entry screens and their associated look up windows.

You may use the F3 key, to move from tab to tab on this table.

Clicking on the X button in the top right-hand corner will close the Edit screen. Note: if you have pending changes or deletions you will be prompted to cancel or save these changes or deletions before you will be allowed to exit the Report table.

DETERMINE HOW TO MAKE A REPORT

Each time you create a new report, you should review the information on each of the eight tabs that are used to create your report, and make changes and additions when necessary. The nine tabs and their primary functions are listed below:

Report Base - used to define the main table or "base" of the report. Optionally used to join company databases for multiple company reporting or exporting.

Sort By - used to list how you want the information on your report to be sorted. This does not determine what prints, or which columns will print, or the order of the columns on your report.

Filter By - used to filter out all of the information that you do not want to see on your report.

Columns - used to list items that you need to see on your report. The fields that you place here (top to bottom) will appear as columns (left to right respectively) on your report.

Subtotal - use this item to determine any subtotals or page breaks that you want on your report.

Layout - use this tab to list page orientation, font size, justification, line spacing, and if you want a photo box on your report.

Header - list here the items that you want to print at the top of your report pages, and mark what type of header you want, if you want the date time page numbers and underlines to display on your report.

Title Page - this item is optional, and can be used to create a Title Page for your report, and to specify the font size.

Print - use this tab to specify where the destination for your report (your monitor, a printer, or a file) the number of pages to print, and any items you want to be prompted for, prior to each printing of this report.

Before you can make a new report, you need to decide several things.

1. You need to decide what information you want to print on your report. For example, if this is a Transaction report, you will need to decide if you want all of your transactions to print.

2. You should decide how you want the information sorted.

3. You should decide if you wish to see detailed information, or if you wish to see summary information only.

4. You need to decide if you want any subtotal to show on your report.

5. Finally, you should decide if you wish to print the report, email the report, or send it to a file such as Microsoft Excel.

For example, decide how you want your report to sort. If it is important to know how many computers you have, and their models, you may want to sort your report by Catalog Type and Catalog Description. This would print all of your Types together alphabetically (computers, monitors, etc.) then, it has subsets of the descriptions, all of these also sorted alphabetically. So, if you have 14 different types of Monitors, they will print together.

If you need to know how many Dell brand desktops are on this floor, you may want to sort by Manufacturer, Type, then description.

You may want to print the report sorted by Inventory Initials, Inventory Date, and Inventory Time. This would assist you in finding any errors that you may need to clean up, as the information would print out in the order that it was inventoried.

You may want to sort your report by Asset number. If you have placed the asset tags on the items in numerical fashion, sorting your report by the Asset number will allow you to see if any of the asset numbers are missing from the sequence. But, be careful when sorting by asset number, as every single asset number is different. Any additional attempt to further sort the information will be meaningless. If you need to sort by anything else, then you need to place the asset number last on the Sort By.

You specify how you want the information to sort on the Sort By tab. The information will sort in the same order as you place the fields in the list.

Next, you specify what you want to print on the Filter By tab.

For example, if your Transaction table holds asset information for four floors of a building, and you only want to print information for floor three, you would need to add a filter to that report. The filter would specify that you only want floor three to print, and would say, Current Floor = 03. Now the report will only print floor three.

Important: Any time you are using a filter, always specify the field by using a right click and look up value. Do not simply type the information in your filter. Typing the filter, rather than selecting a look up value, is the most common reason for a report to not print because you may not type the information correctly.

If you want only the Dell items to print, you would want to add a filter specifying, Manufacturer = Dell.

If you want every item to print except your Portable Computers, you would add a filter specifying, Catalog Type <> PORT COMP.

It is normally not recommended to filter by an individual Catalog, or set of Catalogs. For example try not to add a filter specifying, Catalog (XX9999) = CG1002. This might work correctly now but over time new Catalogs are added and sometimes Catalog descriptions change.

You can make a report that does not have any filters on it. When you do not add a filter, the information in the entire table will print.

You can have more than one filter on a report, but care needs to be taken that the filters are limiting the information in a logical manner. For instance, if you need to see how many Portable Computers you have in your whole building, specifying the Catalog Type = PORT COMP is a good idea. But, you would want to remove a filter specifying the Manufacturer, or a specific floor.

Finally, you need to specify if you need any subtotal, and what you want to subtotal by. This information is filled out on the Subtotal tab.

Care needs to be taken when deciding what you are subtotaling on, as it is most often going to be one of the items that is specified on your Order By tab. These two items work in conjunction with each other. Try to ensure that the subtotal makes sense.

For example, if you sort by Manufacturer, Type, and Description, you would not want to subtotal by Catalog Number, as the end result of this report would not make sense. But, you may subtotal on Manufacturer.

If you sort by asset number, trying to subtotal by Catalog Type would not give you the desired result. But, if you sort by Catalog Type and asset number, you can subtotal by Catalog Type.

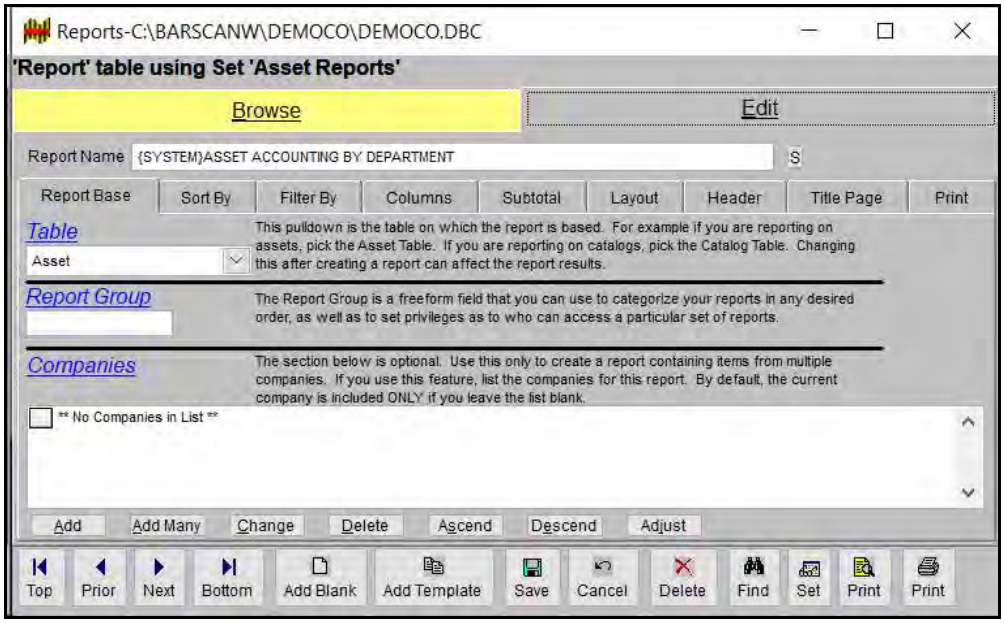
The rest of the information: the columns, their order, their width, their titles, the title of the report, the header, and the Title page are mostly cosmetic additions and changes. (There are a few exceptions, like counts and sums on more intricate reports, but you will need to get used to these a little at a time). For now, try to focus on learning these few facts, and the reports will soon make sense to you.

If you are having trouble getting the desired result, call for technical support, and your Bar|Scan representative will assist you.

The Report Base Tab

The first tab of the Report table displays the name of the report, permits you to select the main table or “base” of the report. Optionally used to join company databases for multiple company reporting or exporting.

The following illustration shows the items on the first tab, the Report Base tab.



Report Name

It is best to give your new report a new name by simply typing in the new name in the Report Name field. You may give your report any name you wish as long as the name was not previously used. The report name can be changed at any time.

Enter any report name you desire and press TAB.

Hint: Since you can print more than one report by using the F4, (Range) key, you should alphabetize your report names so that you can easily range your most commonly printed reports.

For Larger Organizations, you might also consider your department name in the report, e.g. “IT DEPT - SMITH / ALL DELL SERVERS BY LOCATION”.

See how this example provides a clear example of the purpose of the report. It is especially useful to know the SORT order of the report, in this case by location.

In any case, the more descriptive your Report Name is the better since ALL users will have access to the reports that you create.

The Table Section

If you have selected to add your report from a blank, it will initially say that it is a Miscellaneous type of report. Notice the field to the left of the Report Name, displays the type of report that is being made. This field represents the table that the report is for. If you click the ▼ button to the right of this field, you will see a drop down menu similar to the one below.

This drop down menu will display the tables that you can choose from, i.e., you can select Asset, if you are creating an Asset report.

Most of the time, if you are creating an Asset report, you will simply choose an Asset report as your template, and this step will already be done.

Report Group

The Report Group field is a freeform field which has many possible uses. It is not linked to other Tables and it has no special formatting. If the report is unlocked, anyone with privileges to modify a Report can set or change the Report Group value.

The Report Group can be coupled with a User Table filter. Users can be restricted to seeing only those reports that match the User's report filter. Since the Report Group does not actually contribute to the report itself, but rather is used to classify a report, it can be used as a user filter no matter what the contents of the report are.

Our Knowledge Base page on our website www.barscan.com offers more detailed advice on using the Report Group feature.

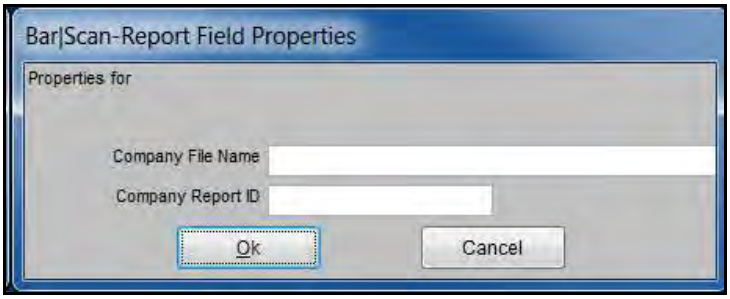
The Companies Section

By default, this section is "greyed out" as most of your reports will probably not require combining several complete Bar|Scan Company databases in one report.

Access to the Companies Section is controlled in the User Table. Master Users and selected others can access the User Table and change various password settings. If you are not a Master User, contact your Bar|Scan Administrator.

Add

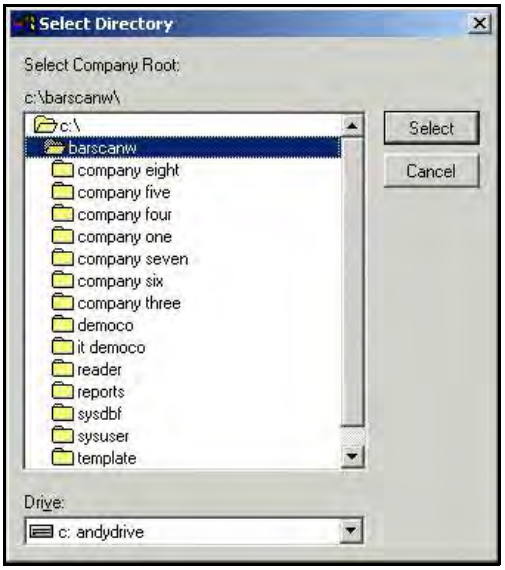
If you wish to include one or just a few Companies in your report, you can use the Add Button to select the Companies individually. If you right click on the Company File name, a window will appear that you can use to navigate to the location of your Company data.



When you select the Company File Name, the Company Report ID will automatically be completed for you. Each Company must have a unique Company Report ID. Typically, it is not necessary to change the Report ID as Bar|Scan can adjust this for you. This is discuss on the next few pages.

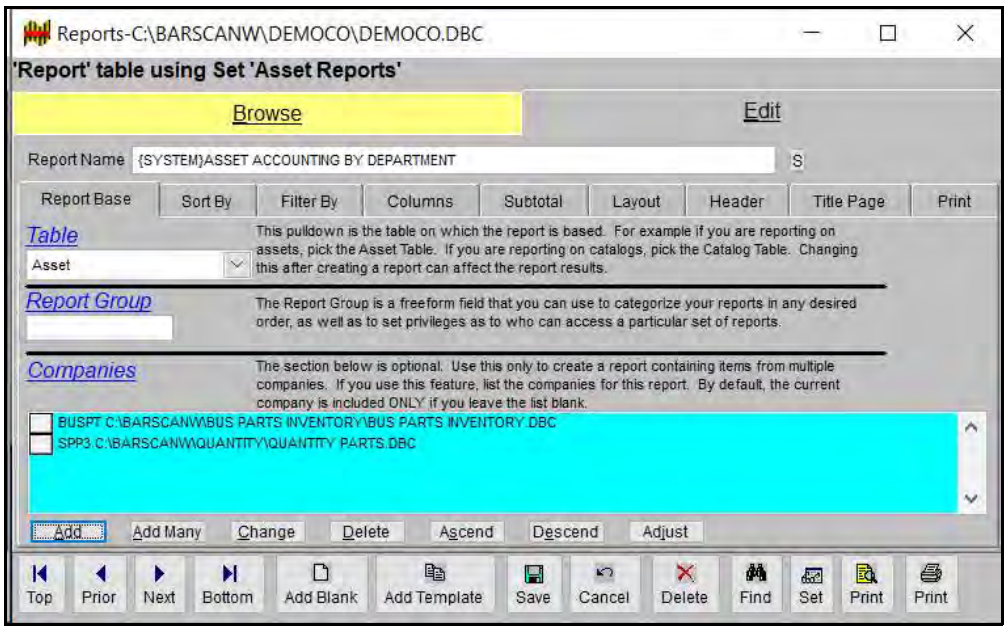
Add Many

The Add Many button can be used to quickly add a group of individual companies to your report selection. When you select Add Many, you will be shown a Look up similar to the one below



Navigate to the root folder that contains all of the companies that you wish to add. In the example above, it is the *barscanw* folder. Another common root folder is the *alldata* folder.

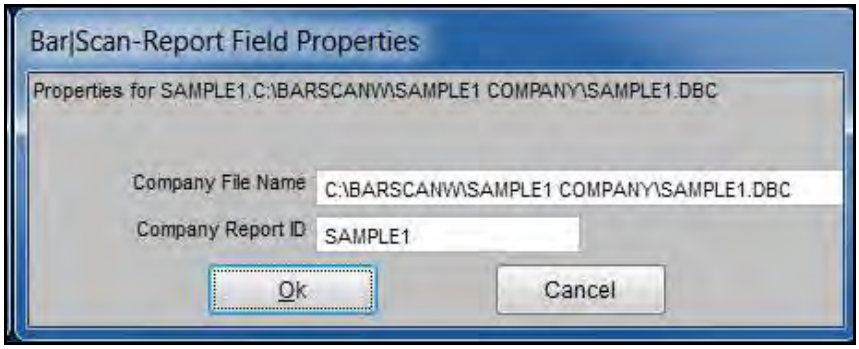
When you press the select button, Bar|Scan will gather all companies in all sub folders and place them in the list as in the example below.



In this example, two Companies were selected. You can continue to add more companies by selecting the Add or Add Many buttons. You can also remove a Company by using the Delete button.

Change

Change is used to change/edit a particular company in the list of companies. Select the Company that you wish to change and then press the Change Button. Typically, the is nothing that needs to be changed once the Company is selected. An example of the Change Pop-up is shown below.



Delete

Delete is used to remove a particular company in the list of companies. Select the Company that you wish to delete and then press the Delete Button. This does not delete any data, it only removes the company from your list.

Ascend

Ascend is used to order your companies in the list of companies. This can assist you when your company list is very long and you want to conform that it is correct. This is for appearance only and does not have any effect on the order of the data in your report.

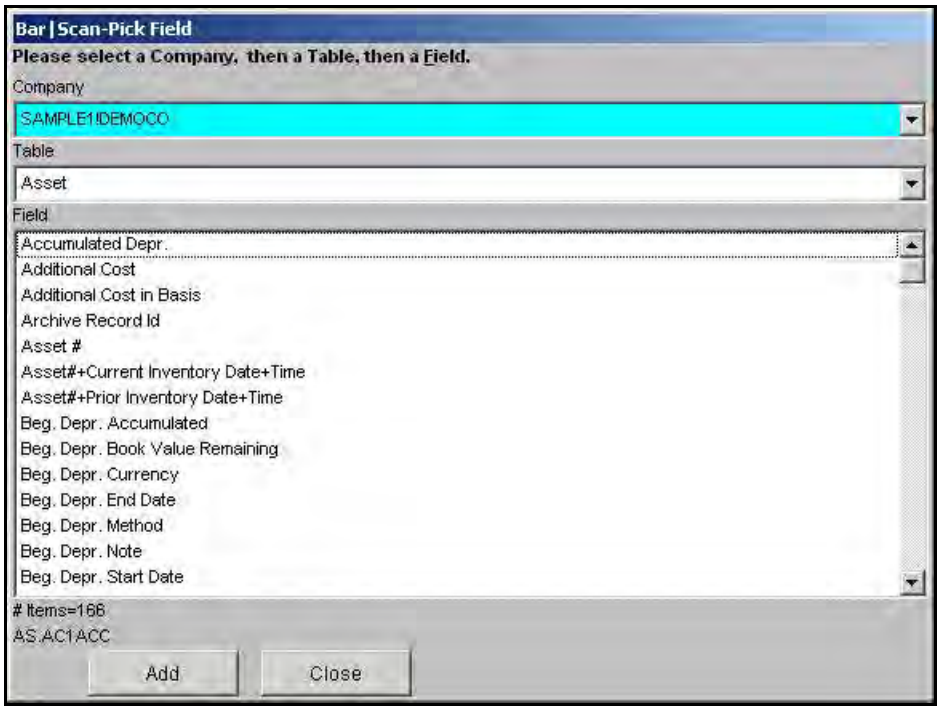
Descend

Descend is used to order your companies in the list of companies. This can assist you when your company list is very long and you want to conform that it is correct. This is for appearance only and does not have any effect on the order of the data in your report.

Adjust

Adjust is used to remove duplicate companies in the company list and makes sure that each company has been assigned a unique Company Report ID which is required for joining the companies for the report.

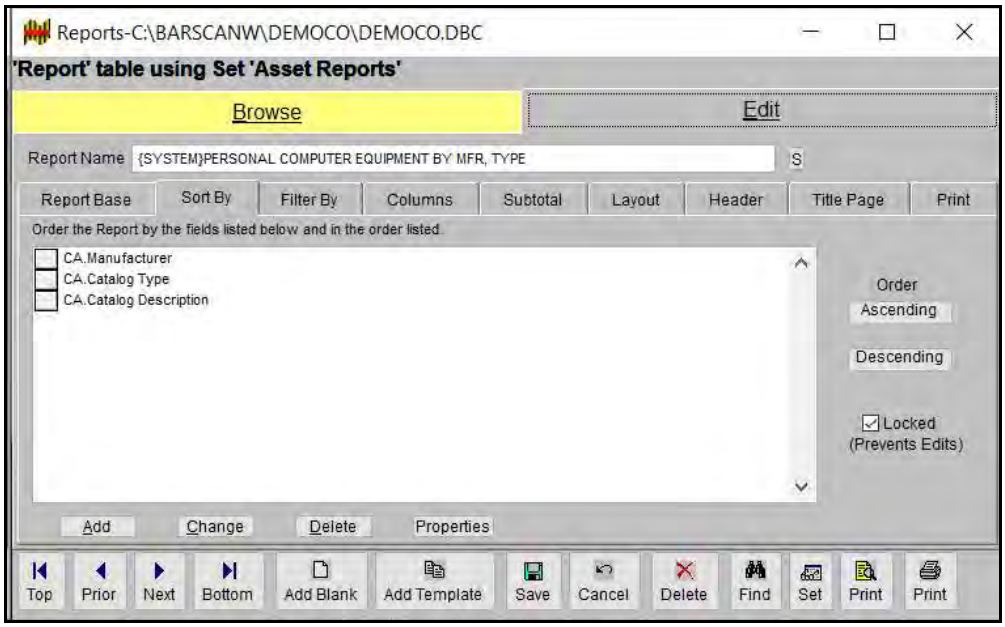
The only remaining difference in create a report for two or more companies is that each pop-up will display an additional item. The first item will now be the company to be used for the selection. An example with the additional Company selection is presented below.



The Sort By Tab

The second tab of the Report table displays the name of the report, permits you to define the order the information will be printed in (what it is sorted by), as well as to decide whether this order will be displayed in Ascending or Descending order.

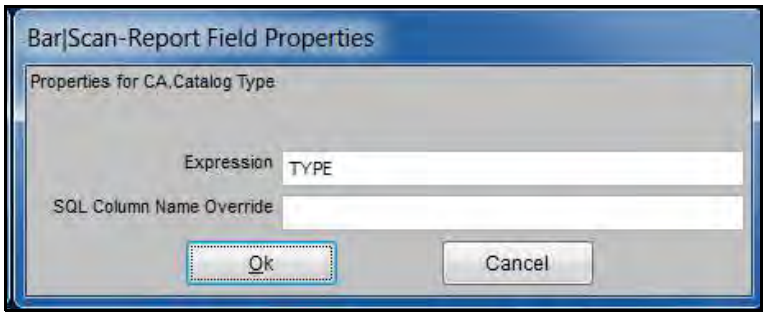
The following illustration shows the items on the second tab, the Sort By tab.



The information displayed will change depending on the report that you have chosen for your Template.

You can Add, Change, or Delete items from the Order By list.

You can also view or change the Properties of an item in the Sort By list, as show below.



You can view or change the Expression for the field you selected. This is a very advanced feature. This is the actual value of the field. For instance, if you needed to print and sort by a combination field such as Current Site Location, this item would allow you to change this field so that only the Region, Floor, and Room (excluding the Current Building). It is rare when you would have to use this function. Please contact your Bar|Scan dealer for more information on this feature.

Finally, you can select a SQL Column Name Override, a feature for advanced users. If you understand SQL, this may be a feature that you would want to use. You can use this feature to make a special column name for an Expression column. For example, you could make an Expression that would print the day of the week next to the date. You can use the SQL Column Name Override to call this column Day and Date.

You can then use the SQL Name designed in the Columns tab, without having to respecify what the column is.

Note: There is a 255-character limitation on the size of the fields for the Expressions and the SQL Name Override.

Sort By

You use the Sort By tab to list how you want the report "ordered." This does not determine what prints, or what columns print. The Sort By only determines the sort.

You may enter many different items on which to sort the report. Usually, two or three items will be sufficient to print the report in the correct sequence.

Choosing a sequence such as asset number will render any additional choices meaningless; as each asset number is unique, no farther sorting will take place.

If you are asked for a report of all of the items in your building, you would probably want to sort the report by current location (Current Region, Current Building, Current Floor, Current Room) and perhaps by Catalog Type and Catalog Description.

Hint: The Sort By tab is used to designate how you want the information on your report "sorted." The sort of the information does not determine what prints, or the order of the columns that print.

If you do not yet understand what is meant by sorting your information, select the report {SYSTEM} DETAILED ASSET REPORT BY LOCATION, change the Order By many times, and use the print preview button to see how the report changes with each different sort.

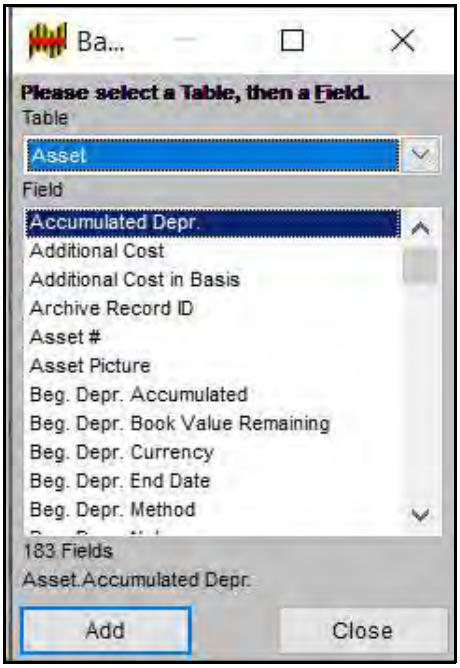
Go to the Sort By list, and click on the Add button.

If you choose Add, you will be using the look up window to add a field to the bottom of the existing Sort By list. All items added will automatically be placed at the bottom of the list, and then can be moved up if desired.

If you click on an existing Sort By item to highlight it, then click on Change, you will be using the look up window to replace the existing field with a new one.

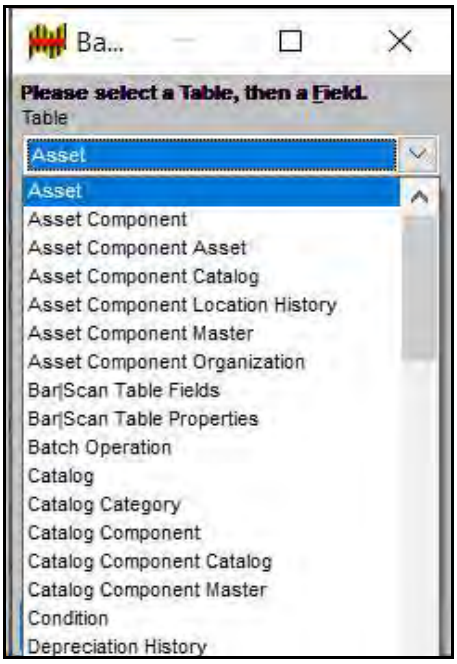
If you click on an existing Sort By item to highlight it, then click on the Delete button, you will be deleting the current item.

If you have chosen the Add or Change button, you will be shown a look up window similar to the one below.



Note the very top field in this look up window, says “Asset.” This field displays the name of the table that the look up information comes from. So, as in the instance above, all of the fields of information being displayed in the look up window come from the Asset table.

However, you may select a different table by clicking on the ▼ button to the right of this field. You will see a drop down menu similar to the one below.



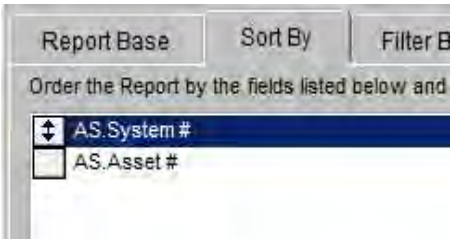
For instance, let us say that you want to sort your asset report by Catalog Type, and Catalog Description. Instead of using the Asset table to select the items from (which is the default for an Asset report), select the Catalog table. After choosing the Catalog table, the items listed in the look up window will originate in the Catalog table.

Take a few minutes and look over all of these choices. When preparing your report, you may use one or several of the tables.

Once you have selected the proper table for your look up window, move your mouse to the desired item and double click on it, or move the highlight bar to the desired item and press the Add button. The item selected will be placed in the Sort By list.

Move the cursor to the next item you want to have displayed in the Sort By list, repeating the process until you have identified all desired sort levels.

Once you have selected the Sort By fields, you may want to change the order in which they appear. This is easily done by moving your mouse over the small box to the left of the item you want to move. As shown, the assets for this report will be sorted by the System number, and then, by the Asset number.



A small double headed arrow will appear on the box. When this happens, press and hold down your left mouse button, and you may drag the name of the field to the new position.

The Sort By as shown will now sort by Asset number. Again, since every Asset number is unique, no further sort will take place, even if more items are listed in the Sort By.

Remember to remove any items that you do not want to appear in your Sort By that may be part of the template.

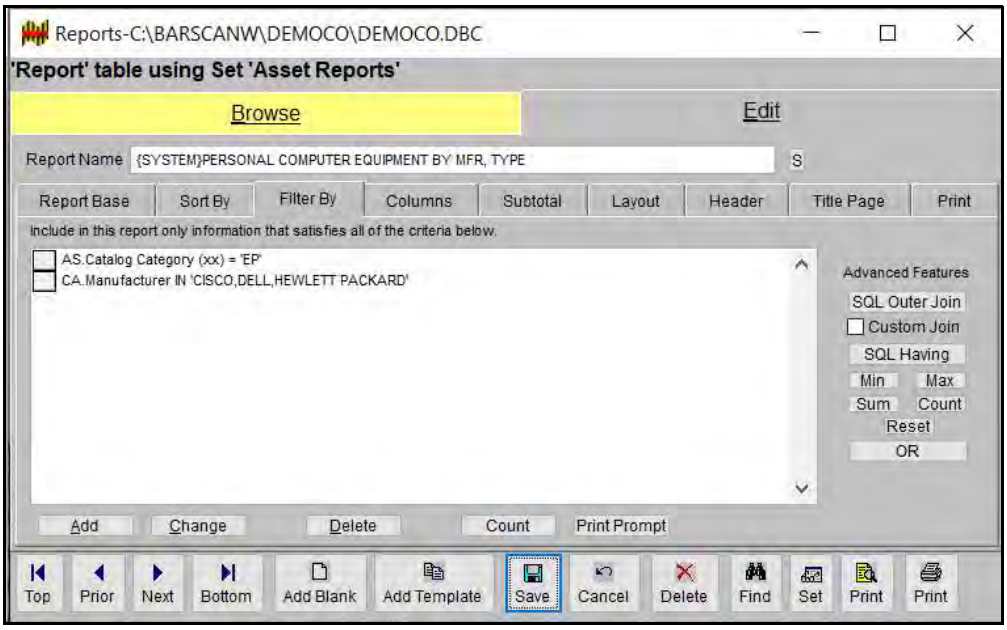
Ascending or Descending

Bar|Scan allows you to decide if you want your report printed in ascending or descending order on an item by item basis. Normally, reports are printed in alphabetical order (zero-9, then A-Z). If you sort your report printed in descending order, the report will be printed backwards (Z-A, then 9-zero).

The Filter By Tab

The second tab is the Filter By tab. You have already told Bar|Scan what you want your report sorted by in the Sort By tab. The Filter By section is used to tell Bar|Scan to filter through all of the information, and to print only the items that meet the criteria specified.

This feature permits you to identify one or more *filters* which can reduce the number of items listed on the report. You can use a filter to specify that you want to exclude all information except that equal to the filter, or to exclude only the information specified in the filter.



On this tab you can add, change, or delete a filter.

You can also press the Count button, to count the number of items that satisfy your Filter By specifications.

Print Prompt

To the right of the Filter section, there is a button that says Print Prompt. This button works in conjunction with the Print Prompts tab. When you select to be prompted for items on the Print Prompts tab, Bar|Scan will ask you, at the time you print the report, to fill out the desired information, i.e., if you select Prompt For Filter By, before you can print the report, Bar|Scan will show you all of the filters in your report. If, however, you also select this Print Prompt for one of the filters, Bar|Scan will show you only that specific filter.

Advanced Features

Very advanced users familiar with SQL (Structured Query Language) can use SQL Outer Join, Custom Join, and a SQL Having button on the Filter By tab. If you are familiar with the way SQL works, you may want to use these features. Most people will never need to run a filter this advanced.

If you are not familiar with SQL, you may need someone who is familiar with SQL in order to use this feature. Please contact your Bar|Scan dealer if you need more information on this feature.

In order to better understand this feature, we need to review how Bar|Scan queries the data for the report filters. For example, If you are running a Transaction report, with a filter of "Transaction, Catalog Code is equal to the Catalog, Catalog Code," Bar|Scan would normally give you only the information that is equal to both.

If it is an SQL filter, however, Bar|Scan would give you all of the information that is equal to both, plus a list of all of the Transactions.

This is a powerful tool, considering that if you have more than one SQL filter, you can compare several different tables in Bar|Scan at the same time.

If you know SQL well, you may opt to use the Custom Join option. This feature will allow you to force Bar|Scan to filter the way that you want, using two or more SQL filters.

SQL Having, works only in conjunction with the SQL Group By, which can be found on the Subtotal tab. SQL Group By works with groups of items, rather than with individual assets.

Normally, Bar|Scan would gather the asset information by applying the filter to see what information you do or do not want to see. By using both SQL Group By and the SQL Having features, you force Bar|Scan to gather the groups of assets, before applying the filter. With this feature, you can ask more for more detailed reports, i.e., you could have Bar|Scan look for all rooms that have assets in them with a value of more than $500.00 (provided you have entered the accounting information), or to list all rooms with more than ten assets in them.

The Minimum, Maximum, Sum, and Count also work in conjunction with the SQL Having, which only works when used with the SQL Group By. By using one of these items in conjunction with your SQL Having and SQL Group By, you will be able to produce the Minimum and Maximum values, and perform Sum and Counts on those reports. You may also use the Reset button, to clear the filter of the Minimum, Maximum, Sum, and Count items.

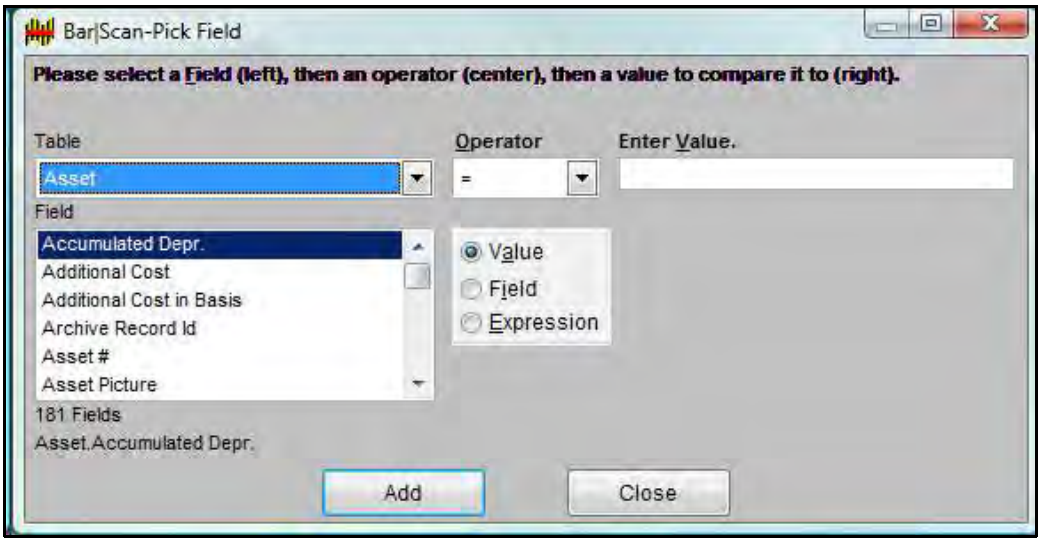
Again, if you are familiar with SQL commands, this feature may be one that you will appreciate.

If you are not familiar with SQL, you do not have to learn SQL to use Bar|Scan.

Or Button

The Or button replaces the AND join between filter items and replaces it with the OR join.

When you want to create a filter, click on the Add button, and you will see a window similar to the one below.



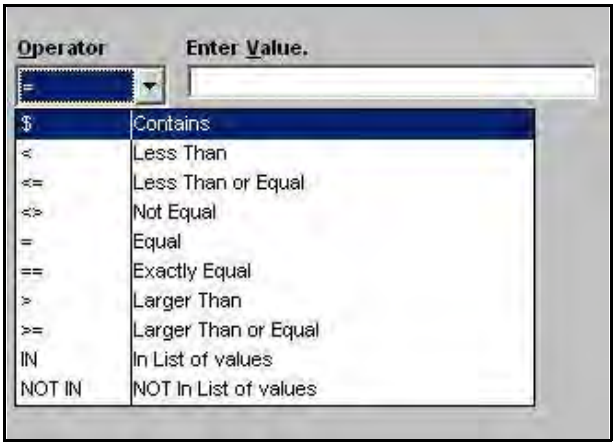
The first field on the top left side of this window says Asset. The fields listed below it (in the list box) come from this table. So, as on the screen above, there are 164 "Asset" fields that you can choose from. The number of the fields may vary depending on the number of modules you have and the program version. Scroll down and select Current Building.

In the middle of the above window, you will see the field for the Operator, and two other choices, Value and Field.

Value is selected by default. Leave **Value** selected, and choose the Operator.

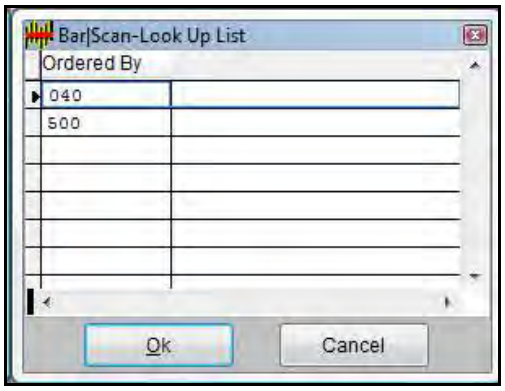
Click on the ▼ button to the right of Operator field, and move the highlight bar to the desired item. Note, since you are trying to reduce the number of items in your report by using a filter, you will want to select the items that you want to see, or those that you do not want to see.

For example, if you want to see only items on the items on the 9th floor of the 500 building, you might choose the Asset table, then choose the Current Building from the list of fields. On the Operator box, you will want to select the down arrow, you will be shown a drop down box like the one below.



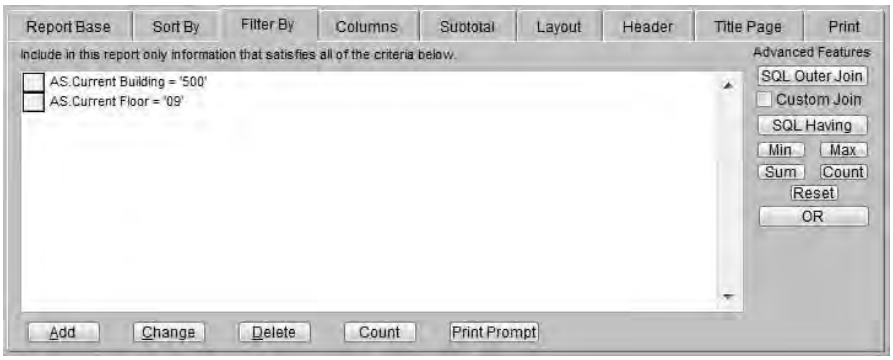
As shown, the choices for the Operator are: Contains, Less Than, Less Than or Equal to, Not Equal to, Equal to, Exactly Equal to, Larger Than, Larger Than or Equal, In the List of values, or Not in the list of values. You will enter the Value next. For our example, we will want to choose Equal to from this drop down list.

Then, you will need to enter a Value for your filter. There is a look up value available for your convenience, simply right click on the empty field, and select Look up Value. You will see a look up window similar to the one below.



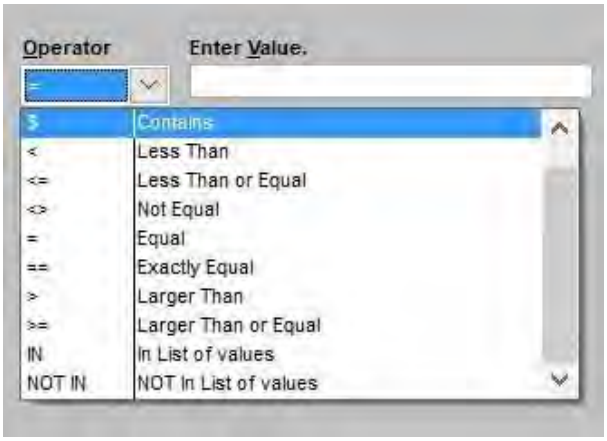
The information in the preceding box will vary depending on the field you have selected. For our example, we would select 500. Then, simply click on the Add button to add the filter to our Asset Filter tab.

Then, click on the Add button, and make a new filter for Current Floor = 09. The finished filter would look like the one below.



By filtering on Current Building equal to 500, and Current Floor equal to 09, we are telling Bar|Scan that we only want to see the items that are equal to our filter. In other words, the only assets that will appear on our report are those assets that are currently located in Building 500, and only those on floor 09. This type of filter is based on the value within the database. For example, Current Floor equals 09 is based on the value “09" in the asset table.

The Filter By Operator, shown below, has options for **Contains**, **In** List of Values, and **Not In** List of Values. An example of how these three operators can be used follows.



Contains: For instance, you might want to use this operator when you want to print a list of lateral file catalogs that have various descriptions, but all of the descriptions contain the word Lateral. To make this filter, you would go to the Catalog table, select Catalog Description, Operator = $ (contains) Lateral.

In: For instance, you might want to print a list of SE catalogs that have no common value, and are not sequential. To make this filter, you would go to the Catalog table, select Catalog Category = SE, and the next line of your filter would be to select the Catalog table, Catalog Number (9999), Operator = IN, and in the Enter Value field place the actual Catalog numbers separated by commas: 1004,1015,1089. Thus, the report would print only these Catalogs: SE1004, SE1015, and SE1089.

You may have rooms numbered 100, 100A, 101, 101A, 102, and 102A in your database. It takes a special filter to get only rooms 100, 101, and 102 to print. Your filter would have to be, Current Room Operator=IN, and in the Enter Value field place the following “100 “,”101 “,”102 “. Notice that there are spaces after the number, and before the quote marks.

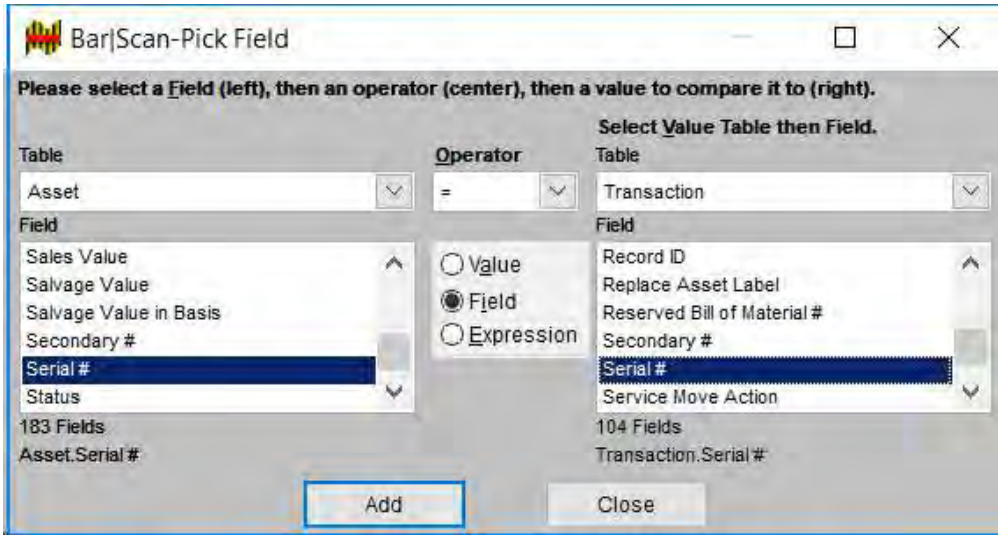
Note that the what you enter into the list should be treated as 'begins with'. For example, when entering 100,101, and 102 would be all rooms that begin with 100, 101, and 102. So in this example Room 101A would also be counted. The same would also apply to the following Not In list.

Not In: You might want to print a list of SE catalogs, which excludes a few of the catalogs. To make this filter, you would go to the Catalog table, select Catalog Category = SE, and the next line of your filter would be to select the Catalog table, Catalog Number (9999), Operator = NOT IN, and in the Enter Value field place the actual Catalog numbers separated by commas: 1004,1015,1089. Thus, the report would print all SE Catalogs except: SE1004, SE1015, and SE1089.

You do not have to limit your use of these Operators to only the Catalog table, as they will work with all of your tables. This feature will also work with any of the fields, not just the Catalog Number.

The order in which you filter "out" the information is important. You want to gradually filter out the information, until you have only the items left that you want to see. Filter out items in the order of size. Since a building is larger than a floor, always place a building filter before a floor filter.

If you select **Field**, then the message by the field on the right will change to say Enter Value Field, and the list will change to display a list of fields as shown below.



In this manner, you can force Bar|Scan to compare a field in one table to another field in the same table, or to a field in another table.

You can use this feature in many instances to compare fields. For instance, you might want to list all of the Serial Numbers in the Asset table that are equal to the Serial Numbers in the Transaction table as in the example above.

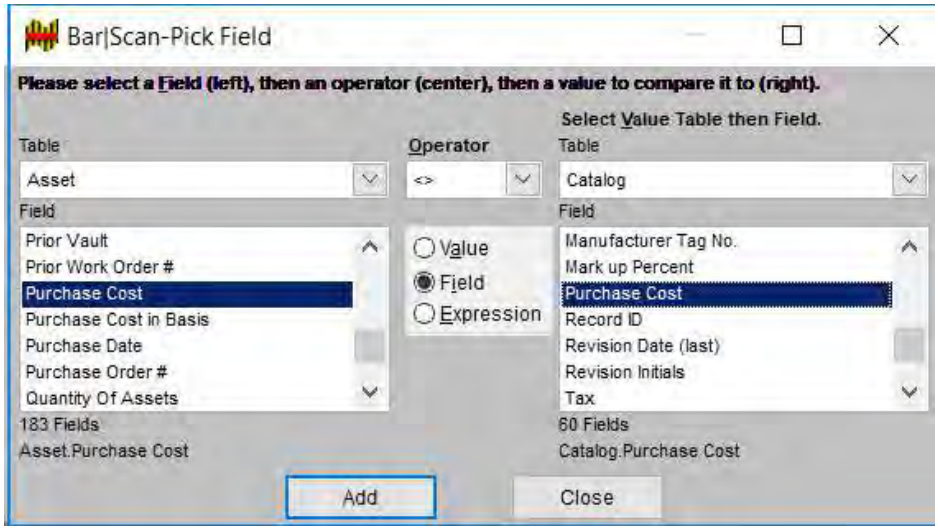
To the left of the word Asset, is a down arrow. Click on that down arrow and you will see a drop down menu similar to the one below.

This drop down menu, allows you access to the rest of the tables that exist in your Bar|Scan system. If you are making a filter, and need to access the Catalog Description, you will want to use the down arrow to select Catalog on the menu shown above. Then the fields, which are listed below it, will be those that are contained in the Catalog table, and you can select Catalog Description.

For instance, if you have the Accounting module, you enter the default purchase price for your items in the Catalog table. During the year you might pay several different prices for the same Catalog item, and enter the actual purchase price for the assets in the Asset table.

By simply setting up the filter, you could have the computer compare the Catalog purchase cost to the Asset purchase cost, and print a report of all the occurrences where the default purchase price does not match the actual purchase price.

The completed filter would look like the one below.



In the above Pick Field, we have stated that we want to see all of the Purchase costs (from the Asset table) that are not equal to the Purchase Costs in the Catalog table.

Depending on your database, you might want to add another filter specifying that you do not want to see any purchase costs that are equal to blank.

Examples of Filters

In the previous example, we were using a type of filter based on the value within the database. For example, Current Floor equals 09 is based on the value “09" in the Asset table.

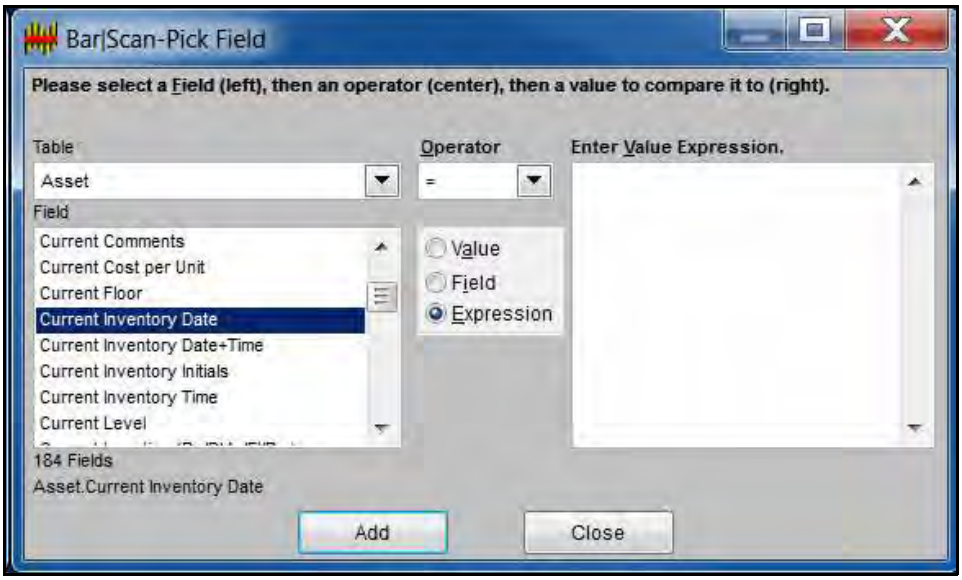
You can create exception reports for items that are missing or have moved since your last inventory.

For instance, create an Asset Report of Current Locations in the Asset table which do not equal the Prior Locations, you can determine items moved since the last inventory.

Or you could create a report of all assets with a current inventory date less than the first date of your most recent inventory. This would print all items, if any, were part of your old inventory, but are not part of your new inventory.

Or by comparing a field in the Asset table to a field in the Transaction table, you could compare a change in the condition or status of an asset. You could compare a change in organization.

If you select **Expression**, then the message by the field on the right will change to say Enter Value Field, and the list will change to display an area to enter an expression as shown below.

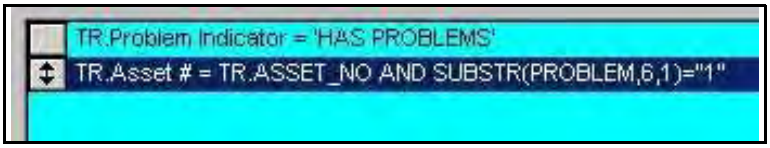


Expressions are custom filters and are rarely needed. Here is one example.

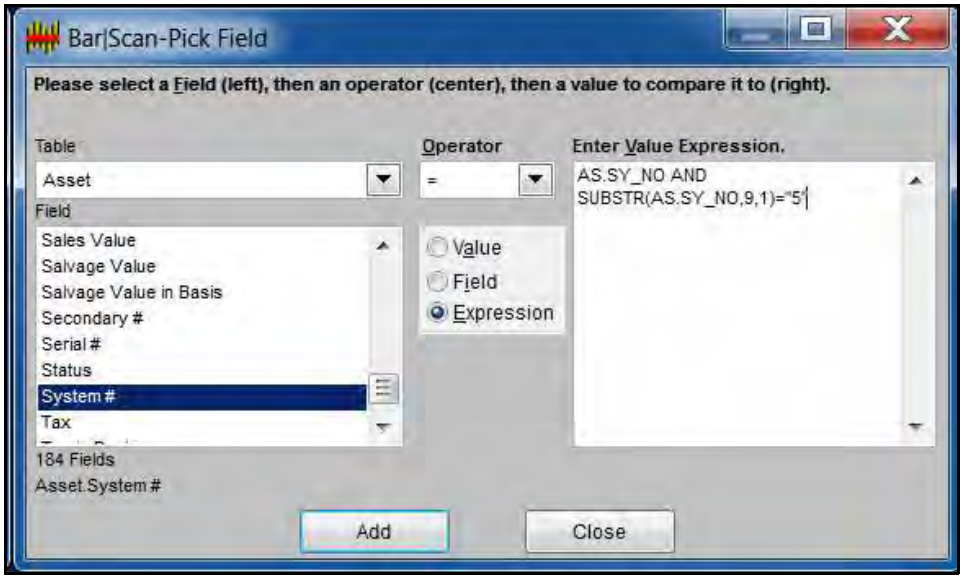
You can make a Transaction Report filtered on only one problem number. You will need two filters in your Transaction report as follows:

TR.Problem Indicator = HAS PROBLEMS'
TR.Asset # = TR.ASSET_NO AND SUBSTR(PROBLEMS,x,1)="1"

Where 'x' is the problem number. In the example below, problem 6 is "Duplicate Asset Number". Below is the actual filter.



below is another example of an expression. This expression looks for the number '5' in the 9th position in the System # field. For example, the System Number '0200444258' would meet the filter requirement.



Note that you first specify the system # field then connect the expression you want with an 'and', i.e. THE FIRST FIELD IN THE EXPRESSION IS THE SAME AS THE ONE SPECIFIED IN THE LIST ON THE LEFT ONLY IN ITS RAW FORM. Then an 'and'. Then the expression that you want to filter on. For example, for the System #:

AS.SY_NO AND SUBSTR(AS.SY_NO,9,1)="5"

In this case the '5' is the value that you want and the '9' is the position you want to look at. It uses the SUBSTR() function

SUBSTR(cExpression, nStartPosition [, nCharactersReturned])

The parameters are:

cExpression -Specifies the character expression from which the character string is returned.

nStartPosition -Specifies the position in the character expression cExpression from where the character string is returned. The first character of cExpression is position 1. Note that if nStartPosition is greater than the number of characters in cExpression, SUBSTR( ) returns an empty string ("").

nCharactersReturned -Specifies the number of characters to return from cExpression. If you omit nCharactersReturned, characters are returned until the end of the character expression is reached.

The Return Value is:

Character. SUBSTR( ) returns a character string.

The Columns Tab

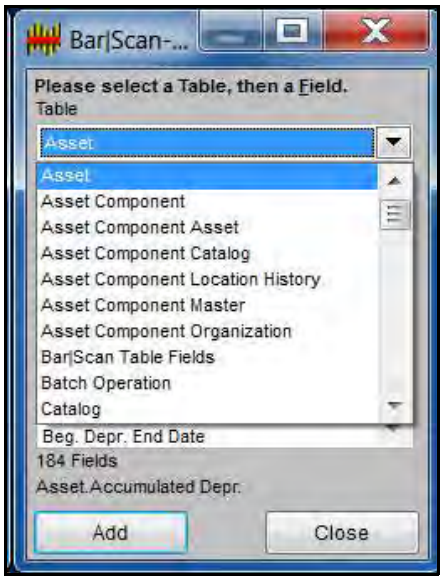
The fourth tab, Columns, allows you to add fields that will appear as columns and the order in which they will appear on the report. Entry #1 will appear in the leftmost column on the report followed by #2, #3, etc., across the report page.

Select the Columns tab, and you will see a tab similar to the one below.

Select the Add button to add new columns in the Specify Columns to Print area. You will see a look up window similar to the one below.

The first box at the top of this look up window says the word Asset. This symbolizes the table where the fields, in the list below, are contained. Therefore, as in the above look up window, you can choose from 184 fields contained in the Asset table.

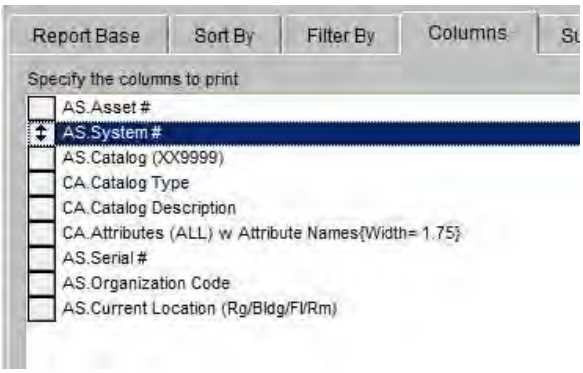
If you wish to access a different table in you Bar|Scan system, simply click on the down arrow to the right of this field. You will see a drop down list similar to the one below.



The selections listed are for all of the different tables in your Bar|Scan system. If you need to access for instance, fields from the Location table, simply choose Location here, by scrolling down the list with the scroll bar. The list of fields below it will change to allow selection of all of the fields in the Location table.

Keep in mind that the order in which you print the columns does not affect the order in which the report will sort.

As you add fields for columns, you will also want to keep in mind that all of the items added to this list will initially appear at the end of the list. You can use the small grey boxes at the left of each item to move the items up or down. This is done by clicking on the small grey box, a small double headed arrow will appear, and when it does, hold the button down, and drag the item to its new location.



Bar|Scan provides the ability to identify a single field which is a combination of several individual fields for the following items:

- √ Locations (both Current and Previous, short, and full)
- √ Attributes
- √ Organization Names

The Site Location combination field (*Current Location* or *Previous Location*) contains the Region, Building, Floor, and Room fields.

The Attributes combination field (*Attributes, All*) contains all seven attribute fields.
The Organization combination field (*Organization Description, Vertical or Horizontal*) contains the *Division*, *Department*, and *Unit* fields.

Catalog Attributes Fields

Catalog attributes are a special case. Different Catalog Categories have different numbers of attributes associated with the Category (up to seven different attribute fields).

You can identify from one to seven individual Attribute fields (Attribute #1 through #7) which will be listed in the file one after another on the same line. You can also select a combination field (*Attributes, All*) which will list all seven Attribute fields.

Because of the variable number of Attribute fields and the considerable length of seven fields, Bar|Scan provides an additional method for listing only the appropriate Attribute fields.

Selecting *Attributes, All* will cause the Attributes fields to be listed in the file one per line. The number of lines for a particular Asset number will depend on the number of Attributes associated with the Asset number's Catalog Category.

The first line of the Asset number entry will contain *Attribute #1*. The next line will contain only *Attribute #2*, and the third line will contain only *Attribute #3*, and so on depending on the number of Attributes associated with the particular Asset number.

The second and third lines (up to seven lines) will position the Attribute field directly underneath the Attribute field on the first line and fill the balance of the line with the space character (ASCII character 32).

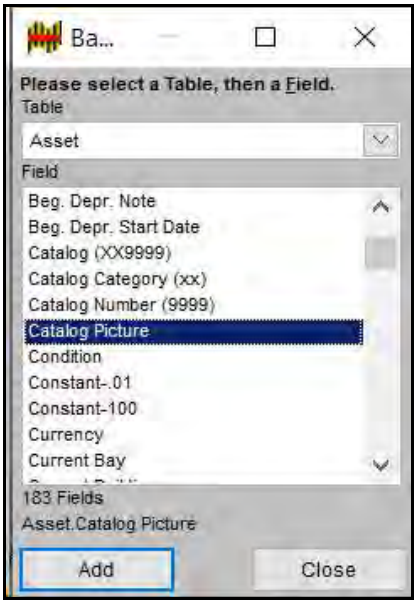
Printing an Image

If you have the imaging module, you can print a picture or multiple pictures of an asset right on your report.

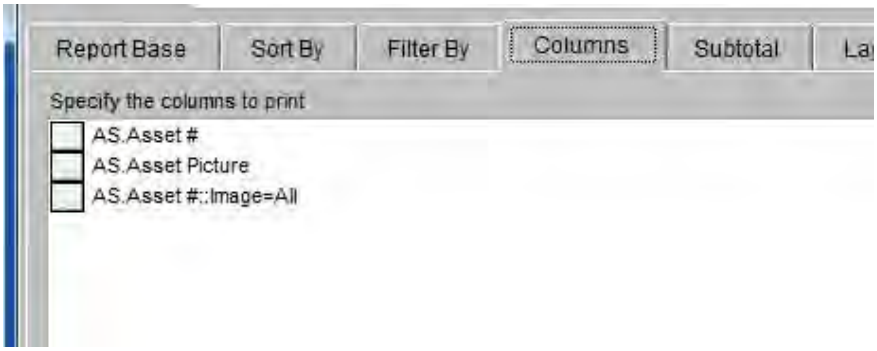
Notice, the image size is defaulted to a square, so, if you make the field three inches wide, your picture will print a three-inch square (three inches wide by three inches tall).

The images that Bar|Scan prints are in a bitmap (.bmp) format. If Bar|Scan finds an image that is not a bitmap format, Bar|Scan will copy it and convert it to a bitmap format. When possible, using a bitmap image to start with is the best option.

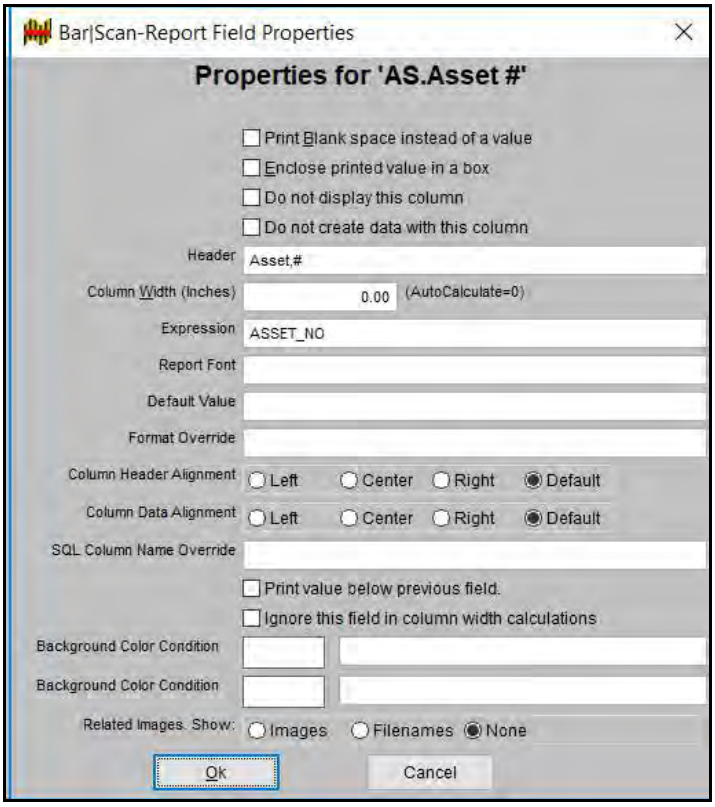
To view images in reports, you have two choices. The Asset Picture field can be used to print the first images found.



To view signatures and all other images associated with a field, select the field in the 'Columns' and edit its properties. Below is an example of either choice for the Asset # field.



Within the 'Properties' dialog there exists a property for showing images: "Related Images. Show:". Select the desired option. 'Images' shows the actual image, 'Filenames' shows, not the image, but the full filename path of the image. 'None' shows nothing and is the default.



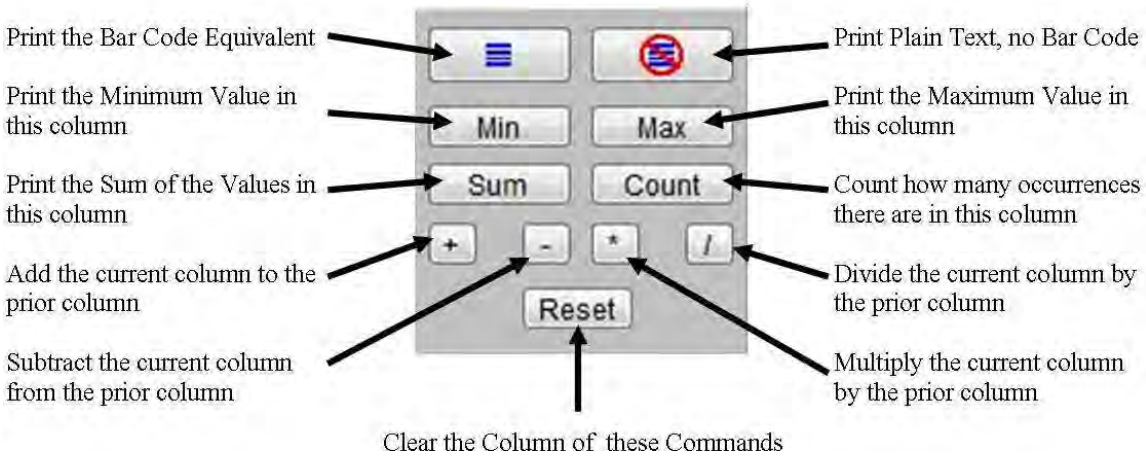
IMPORTANT: Do not select either ‘images’ or ‘filenames’ in this images property if you are using a custom format file generated by a previous version of Bar|Scan. Any totals or counts WILL BE WRONG. Selecting these properties generates a temporary table during the report with the image information (a Table that did not exist in a previous version of Bar|Scan). Due to the nature of how Bar|Scan references this table, depending upon how many images there are per line, ALL column calculations are multiplied by the number of image lines. Format files generated by this version are compatible.

A few items to remember:

1. When setting a field’s properties to list images, the field needs to be one of the key fields that have images associated with them: A person’s name, asset #, catalog or work order. The different tables have different field names for these, but as long as it is one of these it should display. Other fields simply won’t list anything. (Strictly speaking, this is not true, but to do so requires manually renaming the image or signature file.)

2. In reports, the images property will list only existing, permanent images. Once a transaction has moved to the Asset table, then the signatures associated with that transaction become permanent image files in the IMAGES subfolder, so they will display with just this. However, when reporting on the Transaction table before a move, these images are not yet permanent and do not yet exist as files. This means that Signatures will not be shown in the Transaction report unless the ‘Signatures’ field is one of the fields listed in the report. Additionally, the ‘Signatures’ field must have its properties changed to show the images, otherwise it will just show the signature count. In brief, add the ‘Signatures’ field to the Transaction report and set its ‘Related Images” property to show “Images”.

Let us now look at the features that are represented by the boxes at the right of the list of columns to print.



Print the Bar Code Equivalent - If you did not have a bar code printing in a field, this would place one there.

Print Plain text - **No Bar Code** - If you had a bar code printing in a field, this would remove the bar code.

Print the Minimum Value of this Column - will allow you to print a Minimum Value for the entire column.

Print the Maximum Value of this Column - item will allow you to print a Maximum Value for the entire column.

Print the Sum of the Values in this Column - will allow you to print a total in a column (total quantities) or in a financial field (used for dollar amounts).

Count how many Occurrences there are in this Column - is used to give you the number of times the item appears (will not count quantities if they exist).

Plus Sign - this item is used to add the current column to the prior column. Both the current column and the prior column must be a number or a financial field (used for dollar amounts).

Minus Sign - this item is used to subtract the current column from the prior column. Both the current column and the prior column must be a number or a financial field (used for dollar amounts).

Multiply Sign - this item is used to multiply the current column by the prior column. Both the current column and the prior column must be a number or a financial field (used for dollar amounts).

Divide Sign - this item is used to divide the current column by the prior column. Both the current column and the prior column must be a number or a financial field (used for dollar amounts).

Clear the Column of Min, Max, Sum, and Count Commands - This item will remove from the column all of the Min, Max, Sum, and Count Commands

Note: Always use Sum if you want a total in a monetary column, or when quantities are involved.

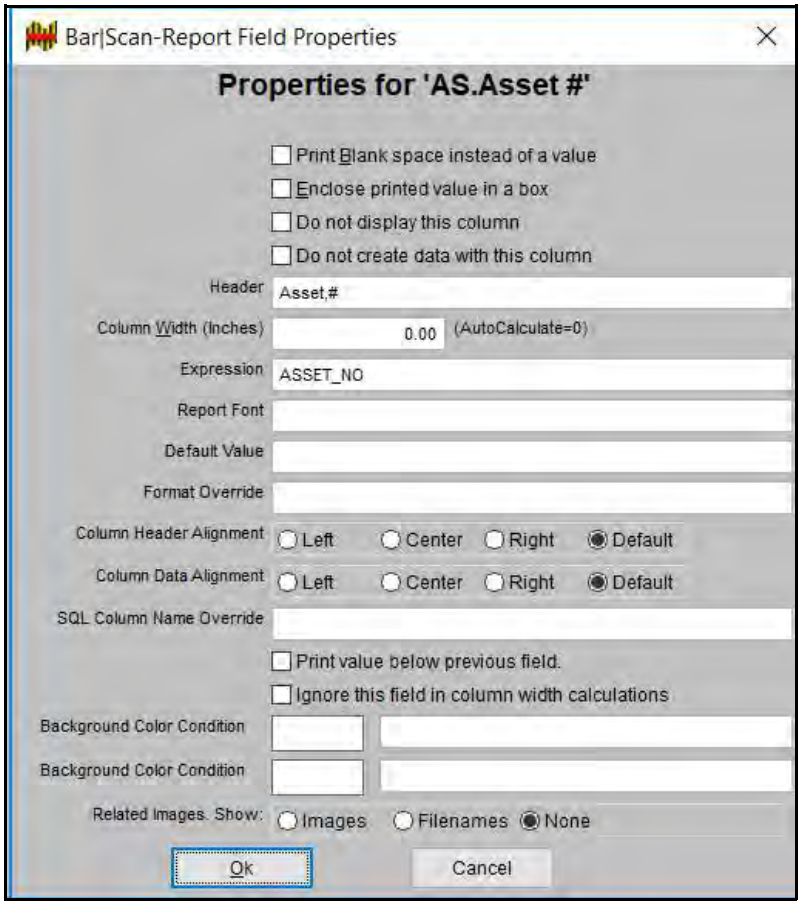
The Sum feature will print a total for the number of the item you identify each time the value of the item changes.

Some caution should be exercised when identifying the totals you wish displayed. For example, if you select Asset #, a total (of 1) will be printed after each line on the page. Usually this is NOT what is desired.

Many times, it is desirable to coordinate this feature with the Page Break feature, showing a total each time a page break occurs, selected on the next tab, Subtotal.

The Properties Button

If you need to change anything about your column, you will want to access the Properties box by clicking the Properties button located beneath the columns box. When you select the Properties button, you will see a window similar to the one below.



In this box you can select to: print a blank instead of a value, enclose the printed value in a box, select a default value, or to not print a column by checking the appropriate check box.

You can change the name of the column (what actually prints at the top of the column) by typing a new name in the Header field.

You can make the column wider or thinner by adjusting the inches of the Column Width.

You can choose the column alignment, both for the header and the data.

You can view or change the Expression for the field you selected. This is a very advanced feature. This is the actual value that prints, not the header. For instance, if you needed to print a combination field such as Current Site Location, this item would allow you to change this field so that only the Region, Floor, and Room would print (excluding the Current Building). It is rare when you would have to use this function. Please contact your Bar|Scan dealer for more information on this feature.

You can select a different font.

Finally, you can select a SQL Column Name Override, a feature for advanced users. If you understand SQL, this may be a feature that you would want to use. You can use this feature to make a special column name for an Expression column.

For example, if you wanted a list of locations that were sorted by the number of pieces at that location, you could use the SQL Column Name Override to accomplish this. You could add a “quantity of assets” column in your columns, select this “quantity of assets” column and then click on the Sum button. You can use the SQL Column Name Override to call this column NUMBER.

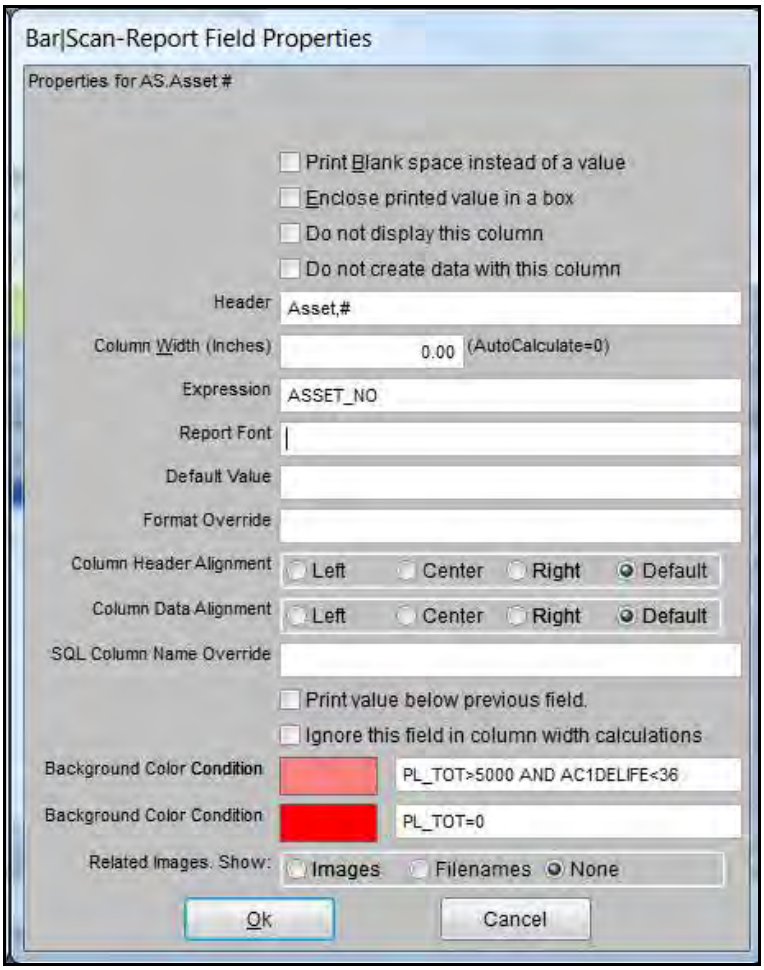
You can then use the SQL Name designed here in the Sort By tab, without having to respecify what the column is. So, on your Sort By tab, put in an erroneous item to sort by, select this erroneous item then use the SQL Name Override option to change that field to be your new NUMBER.

This report now forces Bar|Scan to total the items in the field, before sorting the information on your report, so that your report is being sorted by the total number of items in each location.

Note: There is a 255-character limitation on the size of the fields for the Expressions and the SQL Name Override. A SQL Name cannot contain spaces.

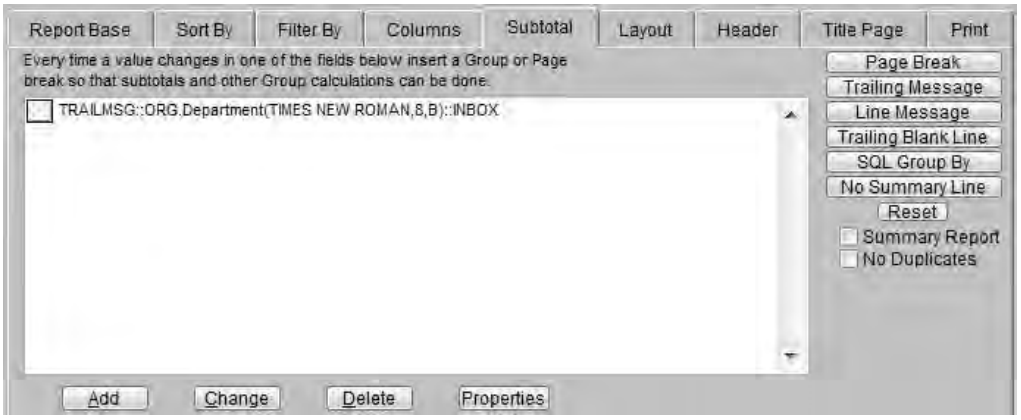
The Background Color Condition allows a printed field to be colorized based on its value. The condition expression is evaluated when printed and the background color of the individual value is set at that time. There are two of these so that there can be two different colors based on two different conditions. (e.g., negative values can be red, values above a minimum value can be green., etc.)

Here is an example. This will highlight the Asset # in red if its value is more than $5000 but its depreciation life is less than 36 months. It will highlight in orange if there is not total cost entered.



The Subtotal Tab

The fifth tab on the Report table is Subtotal. When you select this item, you will see the tab as shown below.



This list tells Bar|Scan what you want to break (or subtotal) on. Normally, you will want to total (or break on) an item that is listed in your Subtotal.

On this tab, you can Add, Change, or Delete the items that you will Subtotal On.

When you select the Properties button for the Subtotal On items you will be shown a box similar to the one below.

You may turn the first few items are turned on and off by clicking on the appropriate checkbox. You can enclose the printed value in a box. You can print headers for the top of each one of the Subtotal group (each one of the subsets). You can force the headers to be repeated at the top of each page.

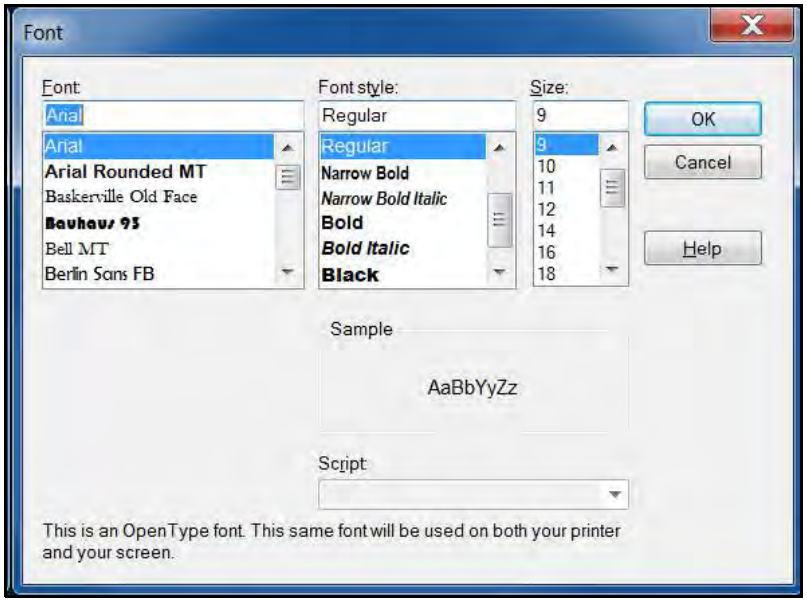
Print leading message with this 'Subtotal' group. This item allows you to print leading messages for a subtotal on group. This is useful when you have more than one subtotal on, and you want leading messages for only one of these groups.

You can change the Header (the actual name of the column) by typing in a different name in the Header field.

You can view or change the Expression for the field you selected. This is a very advanced feature. This is the actual value that prints, not the header. For instance, if you needed to print a combination field such as Current Site Location, this item would allow you to change this field so that only the Region, Floor, and Room would print (excluding the Current Building). It is rare when you would have to use this function. Please contact your Bar|Scan dealer for more information on this feature.

Note: There is a 255-character limitation on the size of the fields for the Expressions and the SQL Name Override. A SQL Name cannot contain spaces.

You can select a different font by right clicking in the report font field. You will see a window similar to the one below.



The text color and background color fields can be changed by left clicking in the appropriate field to access the windows color pallette, and select a color. The color pallette is displayed below.

To the right of the list for the Subtotal, there are eight items: Page Break, Trailing Message, Line Message, Trailing Blank Line, SQL Group By, Reset, Summary Report, and No Duplicates.

To make a **Page Break**, you need only to place an item in the list, highlight it, and then click on Page Break. A page break is used to group items on your report. This feature will cause the report to skip to the next page each time a change is detected on one of the items defined by this feature.

Some caution should be exercised when identifying the Page Break items. For example, if you select Asset #, only one asset will be printed on each page. Usually this in NOT what is desired.

A **Trailing Message** is used to specify what items are being totaled, and lists a total of the number of records that are listed on its own line.

A **Line Message** gives the description of what is being totaled in your report, on the same line as the count or sum would appear, but lists no total of its own.

A **Trailing Blank Line** can be added to your report by clicking on this button. This means that after each total and subtotal, a blank line will be inserted. This feature may make it easier to find and read the totals on some reports.

SQL Group By is a feature for our advanced users. It is the SQL (Structured Query Language) version of a summary report. The differences are internal, the number of items that the computer has to deal with is significantly reduced when using this feature in conjunction with an SQL Filter By.

When a summary report is printed, all of the information is still gathered in detail, but the user ends up seeing only one line per item, and a total. When an SQL Group By is used, the items in the SQL Filter By are gathered, with one record for each type of group. Then the groups are queried. The output is only one record for each item that satisfies all of the criteria, and a count similar to the summary report.

No Summary Line allows you to print a Summary report, but not print a separate Summary Line for each subtotal. This item will give you only a grand total for any monetary sums (if any) and a grand total for the subtotal.

Reset does exactly that, it resets the items back to having no subtotals, or Page Breaks, or message.

The next item on this tab is **Summary Report**. This item is used when you want the totals for all of the items in a report, but you do not need to have all of the details on the items. I.e., If you have fifteen hundred items on the third floor, and you want to know how many of these items are chairs, but you do not need to know what type of chair, then you will want to use this item. Simply set up the report to give you a list of all of the items on the floor, Ordering by Catalog Type, choose the columns that you wish to see, and then click on the box next to Summary. You will receive a report in Summary form.

Important: If you are printing your report in Excel format, the Summary function will work, but when the information is sent to Excel, the Summary portion will be lost, and your items will print in detail form. If you need to print a Summary type of report, yet you need to export the information to Excel, a SQL Group By report will be your best choice. Contact Bar|Scan technical support if you need assistance with your report.

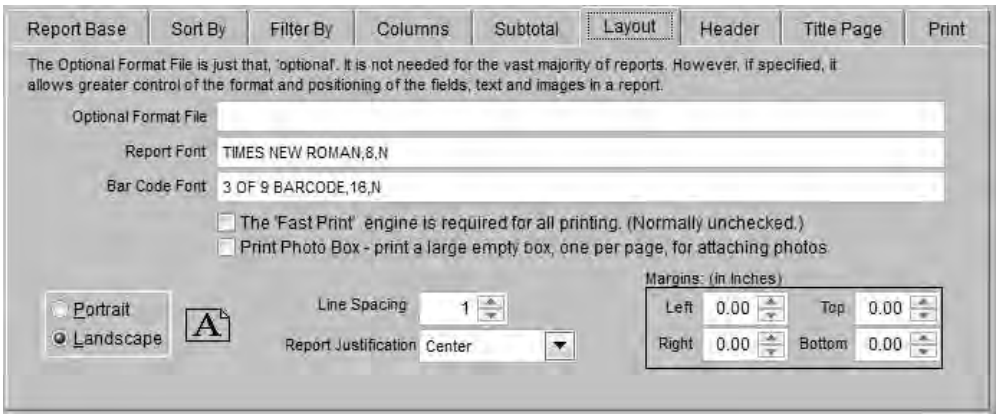
The Last item on the right, **No Duplicates**, forces your report to look for unique items (taking into consideration all of the criteria specified on your report).

If, for instance, you wanted to run a report of Catalog Type and Descriptions, your Sort By could be by Catalog Category. So, if you specified that you wanted no duplicates, you would get a report that listed one record each time it found a change in any of the three items: Category, Type, and Description. But, only one record would be printed for each time the items were all found to be the same.

If you had 40 desks, 20 of them were single pedestal, right-hand desks, and 20 of them were double pedestal desks, for these particular items, you would get two records on your report. Notice, no totals would be listed, unless you specified a count.

The Layout Tab

The sixth tab on the Report table is the Layout tab. When you select it, you will see the tab as shown below.



On this tab, you can enter an Optional Format File, this is used for Custom Reports. This can be used to modify the layout of a Bar|Scan report to fit an existing form or to look like a form. Consult your Bar|Scan dealer before entering information into this field.

You can change the font, the font size, and its appearance in the Report Font field. You can change the size of the Bar Code Font in the Bar Code Font field.

The Print Photo Box is used for making a box for photos at the bottom of the Catalog Sheets. Simply click on the box to toggle between checked for Yes, or unchecked for "No."

You may change the orientation of the paper used when you print the report by simply clicking on either Portrait or Landscape.

The Line spacing can be adjusted by clicking on either the up or down arrow to the right of the field line spacing field. Next is the Report Justification. You can select the down arrow next to the field to change from the default of Center to Left or Right justification.

The last field on this tab is Margins. Only change Margins for offset or binding purposes or if information is being cut off at the edges. Your Windows compatible printer is controlling the maximum page size, not Bar|Scan.

The Header Tab

The seventh tab on the Asset table is the Header tab. When you select this tab, you will see the tab as shown below.

On this tab, you have the options of changing the information displayed on the report including the main header for the report, the Header Style, whether or not the report will have a date, a time, a page number, or underlines for data entry.

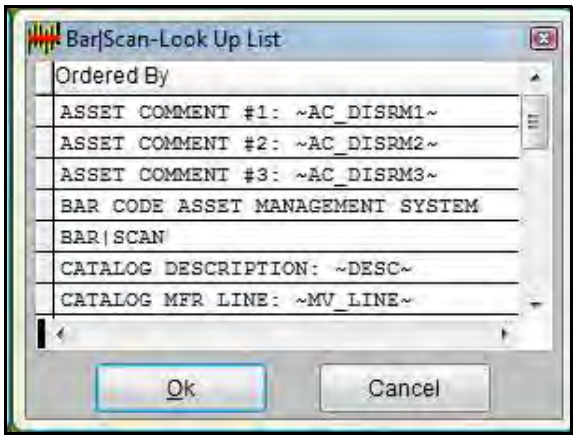
Report Titles

This feature permits you to enter up to three separate lines defining the report and its purpose. The information will be automatically centered for you.

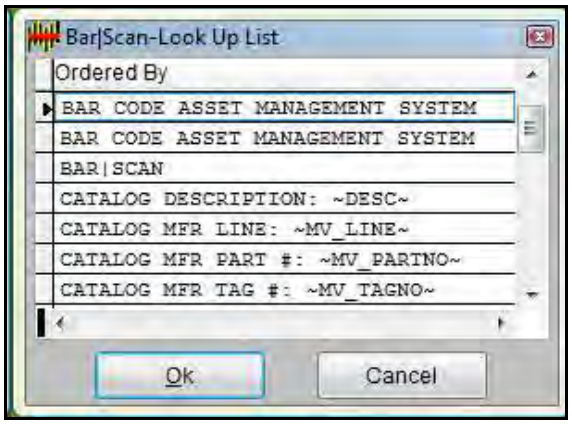
The information entered is entirely up to you. Usually, at a minimum, you will want to assign a report title.

The two items; Left and Right will be placed on the same line of the report. The text you enter for Left will be positioned on the left and the text entered for Right will be positioned on the right of the report.

Place your mouse on the first blank field and right click or press F5, you will see a look up window like the one below.

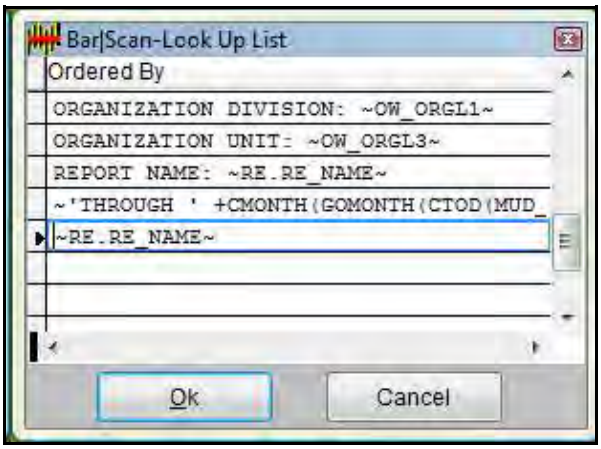


There are several special items provided by Bar|Scan that you may use in any of the five report title lines, some of the special items are shown in the look up windows. The look up window for the second line of the report titles will look similar to the one below.



You may use one of the predefined items from this list, or simply fill in the second line by typing in your own words.

The look up window for the third line of the report titles will look similar to the one below.



You may use one of the predefined items from this list, or simply fill in the third line by typing in your own words.

Some Examples of Special Item That Will Print

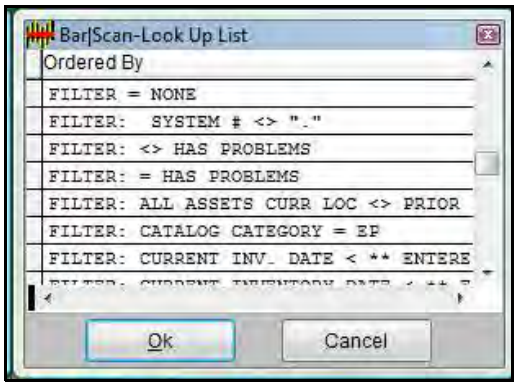
~as.ac_disrm1~	Asset Comment #1 will be printed
~cat_code~	The actual Catalog Code being printed
~cat_num~	The actual Catalog Number being printed
~cat.type~	The actual Catalog Type being printed
~cur_comnam~	The actual Company Name you gave the company
~re.re_name~	The name that is given to the report when it is saved

The items that have terms beginning with and ending with the tilde symbol "~" are macros. These macros contain the field name of the data that will be printed by using the macro. For example ~MV_PARTNO~ is the field name for the Catalog's Manufacturer Part Number.

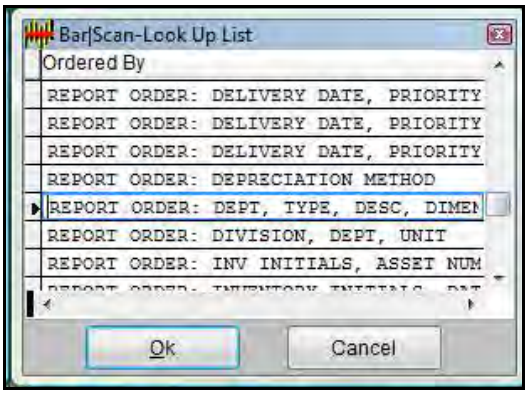
We suggest that you experiment with these special items on you reports. For example, if you use the ~cur_comnam~ instead of typing the company name, and the name of your organization changes, you will only need to make the change once by renaming the company instead of on each report.

Again, the information entered for all items is entirely up to you. Often, these areas are used to identify the sequence of the report and the filters used by the report.

The next item will print on the left-hand side of the fourth line of the title box. Here you may type in any information that you desire. But, we suggest that you use this space to specify what the filter for the report is. If you go to the field specified as Left, right click or hit the F5 button, and select Look up Value, you will see a box like the one below.



The next item will print on the right-hand side of the fourth line of the title box. Go to the fifth field, on this tab, and right click or hit the F5 key, and then, select Look up Value, and you will see a dialog box like the one below.



Again, you can use this space for any information that you want, but we suggest filling this space with information explaining what the report was Sorted By.

Placing the Filter by and the Sort by on the Report title box will allow all who view the report the advantage of knowing these things without having to guess, and can make recreating the report much easier.

The Title Page Tab

The eighth tab on the Report table is the Title Page tab. When you select this tab, you will see the tab as shown below.

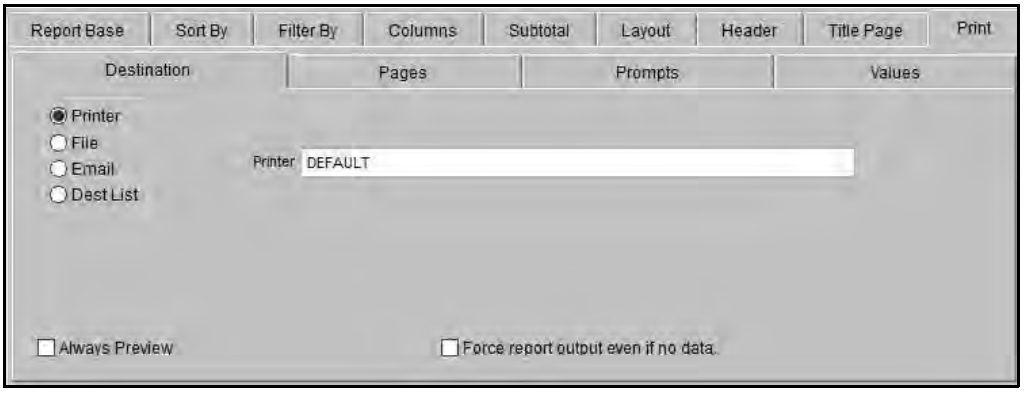
It is not necessary to complete any information on this tab. This Tab can optionally print a cover page for your report. You can either type information into the text area or cut and paste information from another application.

A sample text has been included in the above example.

You can change the font of the entire page. You cannot change the font of an individual line nor insert graphic files.

The Print Tab

The ninth tab on the Report table is the Print tab. When you select this tab, you will see the tab as shown below.



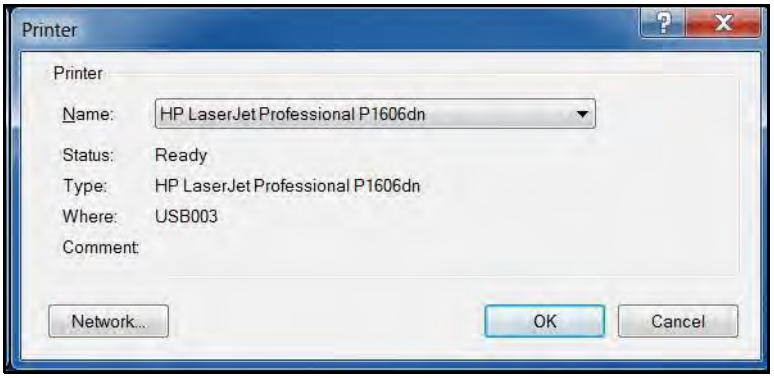
The Print tab, has four additional tabs of its own. The first tab, is the **Destination tab**, as shown above.

On the destination tab, you have the several options. First, select whether you want to send the print job to a printer, send as an email attachment, or save it as a file. If you select Printer, the first field to the right is displayed for you to select a specific printer. The defaulted printer is "Default," but you may select another printer. Simply place your cursor in the Printer field box, and right click or press the F5 key, and choose Look up Value, you will see a look up value window similar to the one on the following page.

There are two check items at the bottom of the screen.

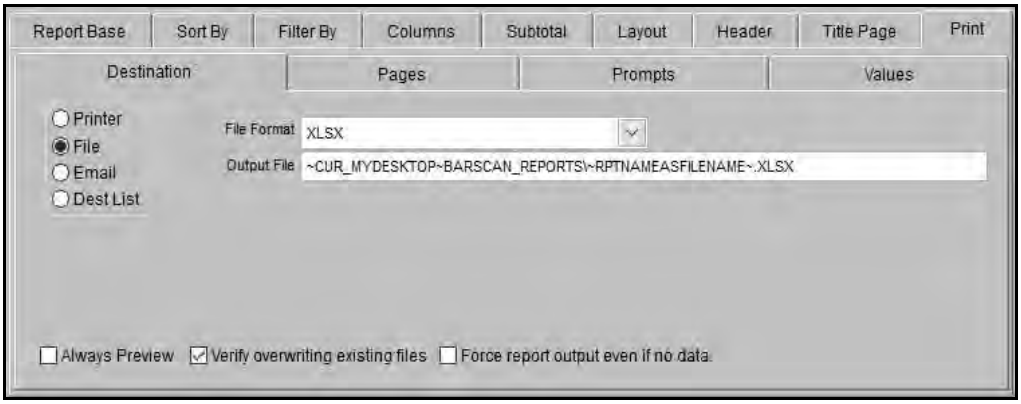
Always Preview - check this if you would like to always have a preview occur before a print or export. If you are printing a report on a regular basis, we recommend that this not be checked.

Force report output even if no data - if your filters leave Bar|Scan with nothing to print or export, you will be presented with the message 'No items match your crieria' and no report is printed or exported. If you still would like a report or export showing that there are no items, then check mark this item.



The look up value box shown previously will list all of the printers that are listed in your computer's Windows folder.

You may send the report to a file on the disk drive to be stored for later printing. *Output file* is for the name of the file that will be stored on the disk.



See your computer system operator for instructions about file names.

If you select a file for the destination of your report, then you will need to fill out the three fields to the immediate right, the Output File, the File Format, and the Verify Overwriting Existing Files.

If you place your cursor on the Output File field, and right click or select the F5 key, then select Look up Value, you will see a window appear where you can choose a file from any of those listed on your computer.

Bar|Scan has four tilde variables for use during report exports. These variables allow reports to send report files to the current company folder and to the Bar|Scan SYSUSER folders. These should be used with caution as it is possible to overwrite Bar|Scan or user data. These are:

#1. CUR_COMPATH - Contains the full path of the current company with a trailing backslash. For example, for company

C:\BARSCANW\DEMOCO\DEMOCO.DBC

it is

C:\BARSCANW\DEMOCO\ <INCLUDING THE TRAILING SLASH>

#2. CUR_SYSUSER - Contains the full path of the SYSUSER folder with a trailing backslash. For example, for installation

C:\BARSCANW

it is

C:\BARSCANW\SYSUSER\ <INCLUDING THE TRAILING SLASH>

#3. CUR_MYDOCUMENTS - Contains the full path of the My Documents folder.

#4. CUR_MYDESKTOP - Contains the full path of the Desktop folder.

These make it easier to design a single 'file export' report across multiple companies. This is typically needed when interfacing with third party software systems. Here is a sample screen of a typical use of CUR_COMPATH within the DEMOCO company. The CUR_SYSUSER variable is used similarly. Here is an example:

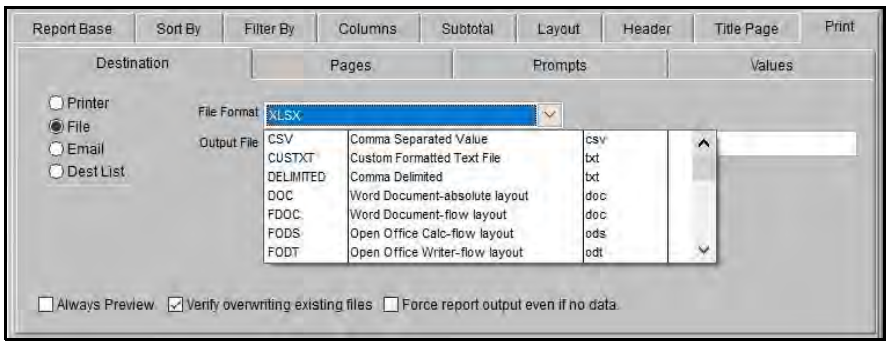
In the previous example, this report will be sent to the file on your desktop called BARSCAN.XLSX.

You must follow these rules to use them properly and safely:

1. They must be used within a tilde expression (i.e. in an expression between two tildes) within the report's 'Output File' field. If the report is being printed or exported some other way, such as to a printer or through email then the file destination will be ignored.

2. Care must be exercised not to overwrite any Bar|Scan data files or even your own data files placed in Bar|Scan folders.

The File Format field has a drop down menu, which you may access by simply clicking on the down arrow to the right of that field. The drop down menu is shown below.



Note that there is again a scroll bar located to the right of this drop down menu, so this is only a partial listing of the types of files that you can use for your output.

If you will be sending a report using email, you will needs to have Microsoft Outlook installed on your computer. Bar|Scan does not support other email clients.

You can redirect any report to any email recipient. Select the 'Print' tab on the report, then the 'Destination' tab. Select 'Email' on the left, enter the target email account and file format (XLSX in this case). You you wish this report to always go to this email address, then 'save' the report. The next time it prints it will automatically be emailed when 'printed'. If it is just a one- time event, you do not

have to save it, just 'print', then when it is done being emailed, you can cancel the changes. If you need to send it to multiple email accounts, select the 'Dest List' first then add each of the accounts you want to send it to.

File Format

You may choose from twenty-two different report formats CSV, DELIMITED, DOC, FDOC, FODS, FODT, FOXPRO, FRTF, HTML, MHT, ODS, ODT, PDF, PLAN, RTF, SDF, SIF, TEXT, XL5, XLS, XML and XPS.

CSV

The comma-separated values (or CSV) file format is a delimited data format that has fields separated by the comma character and records separated by newlines. Fields which contain a comma, newline, or double quote character or which start or end with whitespace, are enclosed in double quotes. If a field's value contains a double quote character it is escaped by placing another double quote character next to it. The CSV file format does not require a specific character encoding, byte order, or line terminator format.

DELIMITED

ASCII comma, quote delimited is the most popular personal computer export and import format. The information is converted to ASCII format which means that it can be read by even a word processor. The items are separated by commas. Alpha numeric items (which can contain both letters and numbers) are also enclosed with quotation marks. Choose from Delimited with Blank, Delimited, or Delimited with Tab.

MICROSOFT WORD DOCUMENT FORMATS

Microsoft Word Document - absolute layout (or DOC) format
Microsoft Word Document - flow layout (or FDOC) format
Open Office Writer Format - absolute layout (or RTF) format
Open Office Writer Format - flow layout (or FRTF) format

Word documents documents have two output options – "Absolute positioned layout" and "Flow layout". The generated documents often look the same, but the algorithms behind these options are completely different. The absolute positioned layout always looks like the original report, but is hard to edit and bigger in size. The flow layout may not always look exactly the same, but it is a 'real' Word

document - easily editable, with styles, page headers and footers, paragraphs and tab stops, which is also shorter in size and faster to open.

OPEN OFFICE DOCUMENTS

Open Office Calc Spreadsheet - absolute layout (or ODS) format
Open Office Calc Spreadsheet - flow layout (or FODS) format
Open Office Writer Format - absolute layout (or ODT) format
Open Office Writer Format - flow layout (or FODT) format

OpenOffice is using the OASIS Open Document Format (ODF) for Office Applications, which is also supported by a variety of other office applications including StarOffice, KOffice, and IBM Workplace. XFRX generates the file formats natively, so OpenOffice doesn't have to be installed on the computer where the document is generated.

FoxPro

This is Microsoft's Visual FoxPro 9.0 native file format. This format is typically used to interface with another database.

HTML DOCUMENT FORMATS

HTML document with included graphics (or MHT) format
HTML document (or HTML) format

HyperText Markup Language is the predominant language for web pages. This format is typically used to post to a website.

PDF DOCUMENT

Portable Document (or PDF) Format is a file format created by Adobe Systems for document exchange. It is now an open standard and a popular standard because it encapsulates the information to properly display a document making it independent of application software hardware and operating systems.

PLAIN

Plain Text (or PLAIN) Document contains no format definitions at all. No fonts, graphics, lines, page breaks, etc. are included.

SDF

System Data Format - txt - is an industry standard for file formats and could be used when sending the report to a file which will be transferred to a different computer.

SDF puts the different fields into a disk file one field after another; the lengths of the individual fields determine the position of the field on each line in the file. Each line (record) in the file can contain number fields. However, the total number of characters in one line may not exceed 253. One line in the file (a record) can contain only the information associated with a single Asset number (with one exception, see the *Attributes Fields* section below).

Whenever the SDF output method is selected, several Bar|Scan report features are disabled; *Show Options, Page Description, Portrait and Landscape definitions, Report Titles, Page Break On, Print Totals for Change In,* and *Report Header Style.*

The Bar|Scan system contains many fields, all of which cannot be included in a single SDF report file. You may select fields which, when all of the characters for each field are totaled, contain less than 253 characters.

The number of characters for each field is shown in the table below. Note that the field lengths may be changed as new features are added to Bar|Scan. Consequently, we recommend you allow some flexibility regarding field length in programs that will use the information.

Some fields will contain fewer characters than are allocated to the field. These fields will be filled with trailing space characters (ASCII character number 32). The first character in a field will be left justified.

SIF

This is Standard Interchange Format. It's derivative, CAPSIF, is sometimes used in the furniture sales industry. Each line of the CAPSIF begins with a two-character op-code, followed by an equal sign (=). followed by the data associated with the code. In all cases with Bar|Scan the data associated with these codes is less than 60 characters long. Only one type of information is specified for each line in the CAPSIF file.

The following is a detailed description of each of the CAPSIF codes used by Bar|Scan. The first five are used to define the specification file as a whole.

SF= Specification File name (drive:\path\filename.ext) as saved in Bar|Scan
ST= Specification Title, saved in Bar|Scan as the optional destination description
L1= User Label 1, saved in Bar|Scan as the Report Title # 1 line
L2= User Label 2, saved in Bar|Scan as the Report Title # 2 line
L3= User Label 3, saved in Bar|Scan as the Report Title # 3 line
PN= Product Number, saved in Bar|Scan as the Manufacturers Part #
PD= Product Description, saved in Bar|Scan as the Catalog Type and Description
MC= Manufacturer Code, saved in Bar|Scan as the Manufacturer Name
QT= Quantity, saved in Bar|Scan as the Quantity
TG= Tag #, saved in Bar|Scan as Manufacturers Tag #
GC= Catalog Number, saved in Bar|Scan as Catalog
ON= Attribute Numbers 1 through 7, saved in Bar|Scan as the Attribute Names
OD= Attributes 1 through 7, saved in Bar|Scan as the Attributes

When creating a SIF report, there are some rules that you must follow in order to successfully generate a SIF file. These are rules associated only with the SIF Standard and not Bar|Scan reporting. They are as follows:

1. Make sure that all required Catalog Category fields are included under Columns, and included only once. A user may not realize that they must include these fields. These fields are listed below

CC.# Attributes
CC.Attribute #1 Caption
CC.Attribute #2 Caption
CC.Attribute #3 Caption
CC.Attribute #4 Caption
CC.Attribute #5 Caption
CC.Attribute #6 Caption
CC.Attribute #7 Caption

CC is the Alias to the Catalog Category table

2. Make sure that all Catalog Attribute fields are included, and again include them only once. These fields are listed below.

CA.Attribute #1
CA.Attribute #2
CA.Attribute #3
CA.Attribute #4
CA.Attribute #5
CA.Attribute #6
CA.Attribute #7

3. Be careful how you specify the catalog (xx9999). You may not use catalog codes or numbers from two different tables in your report. A common mistake is to put CA.Catalog(xx9999) in the list of Columns and to order by AS.Catalog(xx9999). These need to be both either CA or AS, but not CA and AS. You must include separate specifications of Catalog Code(XX) and Catalog Number(9999) somewhere in your report.

Following these rules will minimize the most puzzling messages when trying to create SIF reports.

TEXT

Straight Ascii Text Format - txt - provides only the characters available in the IBM Extended ASCII character set and is most often used when your printer is not a Laser printer. When printing to a file, it will preserve header and page break information. This is not the case with Delimited files.

XLS

Use XLS to export a Microsoft Excel version 2 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record. A .XLS extension is assigned if you do not include a file extension.

XL5

Use XLS to export a Microsoft Excel version 5 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

Choose one of the available file formats by a clicking on it with your mouse, or pressing the associated hot key, or use TAB to move to the button and press ENTER.

If you are not sure of the format required for your application, choose ASCII Comma/quote delimited.

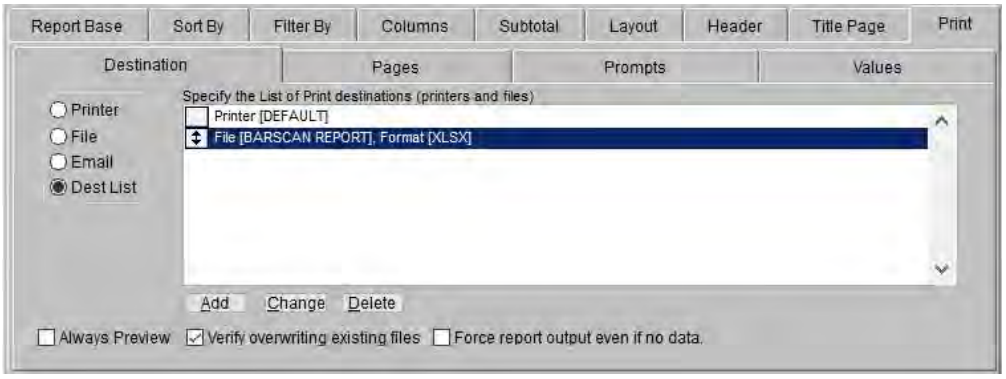
XML

The Extensible Markup Language (XML) is a way of describing data. An XML file can contain both coding and the data too, as in a database. It is a simplified subset of Standard Generalized Markup Language (SGML). Its primary purpose is to facilitate the sharing of data across different systems, particularly systems connected via the Internet. Languages based on XML (for example, Geography Markup Language (GML), RDF/XML, RSS, Atom, MathML, XHTML, SVG, XUL, MXML, EAD, Klip and MusicXML) are defined in a formal way, allowing programs to modify and validate documents in these languages without prior knowledge of their particular form.

XPS

The XPS [XML Paper Specification] is a document specification developed by Microsoft. To be able to preview the XPS document, you need an XPS document viewer. If you are running Windows Vista you already have one as it is included with .NET Framework 3.0.

The *Destination List* feature may include a particular printer or file name, or you may use the Prompt For feature to enter a file name.

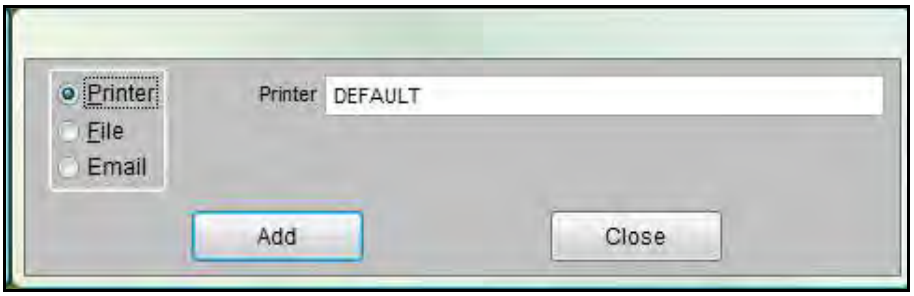


The Destination List was designed so that you may list two or more destinations, and a copy of this report will go to each destination every time it prints.

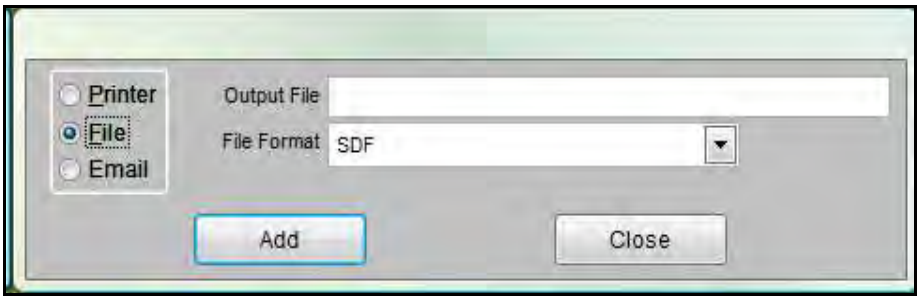
For example, you may use this feature to print a report, and to email a copy of it to your colleague as well.

Once listed in this manner, the report will print to both the printer and to your email application every time it prints, until you change the Destination List. It is important, therefore, if you are printing the report as a file that you specify that you want to "Verify overwriting existing files" by placing a check in the appropriate check box as shown above.

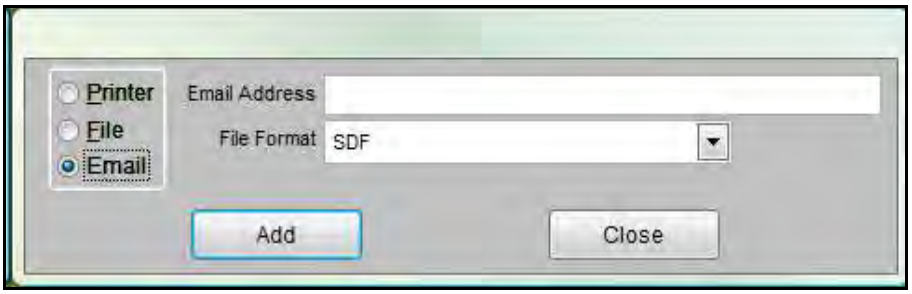
When you select Destination List and click on the Add or Change button, you will see a window similar to the following.



When you select File, the window shown above will change to appear like the one below.

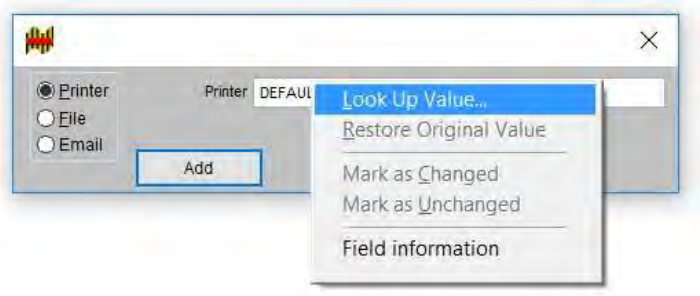


When you select Email, the window shown above will change to appear like the one below.



Use any of these windows to build your destination list.

Keep in mind that you can use the right click on the Output File to browse your network and place the result anywhere, including your Desktop, as shown in the example below.



If you are using the Email format, right clicking will present you with your email address from your Microsoft Outlook Contacts. This function is not compatible with other email applications.

Verify overwriting existing files

This prompt will only appear when you send the report to a file. We recommend that you always use this feature.

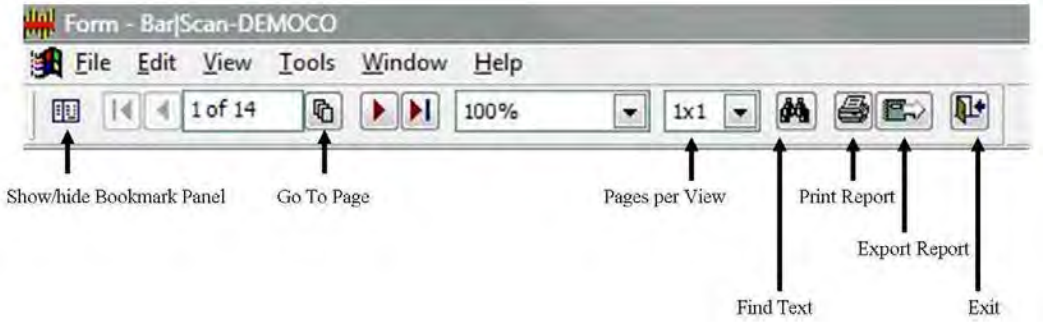
Print Preview

Immediately under the File option, is the phrase 'Always Preview' with a box next to it. Simply check this box if you want to Preview your report on your screen when you wish to preview before printing. Even though the report is only being printed onto your screen, Bar|Scan still considers this a print function. If you use this function, each time you select the print icon, your report will be sent to your screen for you to preview. You may choose to print the report from the preview, or choose to exit the preview without printing it.

A Word About Report Previews

The Preview feature is one of the largest time savers in Bar|Scan, as you can see the way your report will look, without having to print a single page. On the preview page you can determine if any of the column widths or the Headers of those columns need adjustments.

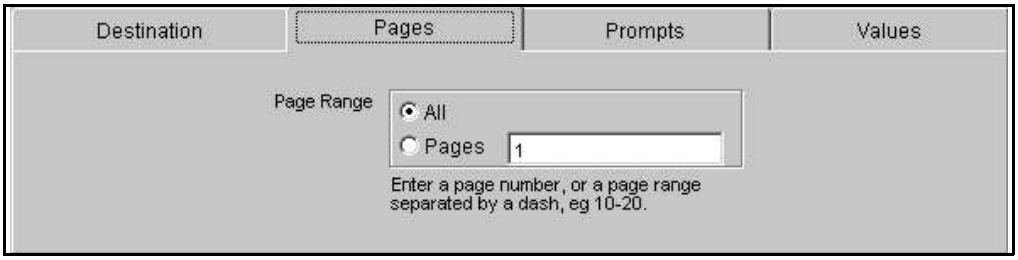
If you need to make adjustments, simply exit the preview by going to the preview tool bar as shown below, and click on the icon of the open door.



You can use the print preview feature to browse through your information without printing it out, or, you if you find that your report looks the way you want it, you may click on the last button to print the report.

Note: If you have selected to preview your report, then print it from the preview, **ALL** of the pages will print even if you have selected only certain pages to print.

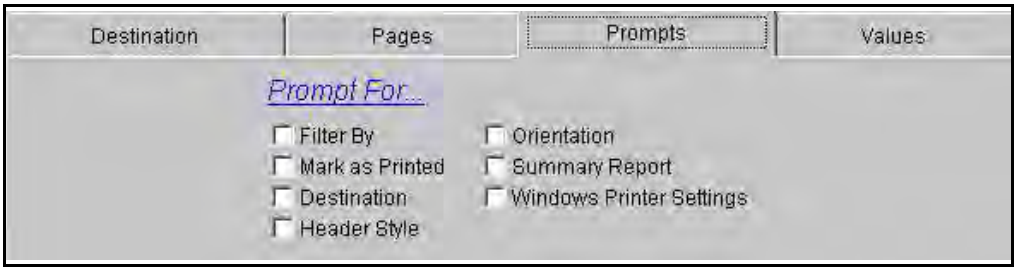
The second tab on the Print tab, is **Pages tab**, as shown below.



The Pages tab permits you to choose to print all of the pages, or a single page, or a range of pages. If you wish to print the entire report, select All. If you wish to print only one page, or a range of pages, select Pages, then, simply type in the corresponding number(s) for the page(s) that you would like to print. If you are planning to print a range of pages, enter the page numbers separated by a dash.

Note: If you select to Preview your report, then print from the Preview, ALL of the pages of the report will print, regardless of your choice on this page. If you do not want to print the entire report, yet you still want to preview the report, preview it, and close the preview. Change the report so that preview is not selected. Then, print the report, and the pages you selected will be the only ones that print.

The third tab on the Print tab, is the **Prompts tab** as shown below.



This tab permits you to select items that you will be prompted for before the report can be printed.

You may want the person selecting the report to make some decisions about the report before it is printed. This feature is optional and will direct Bar|Scan to include one or more prompts.

The selection window provides eight choices: Filter By, Mark as Printed, Destination, Header Style, Location Histories, Orientation, Summary Report, and Windows Printer Settings.

If you select **Filter By**, the person requesting the report will be prompted to select a specific filter before printing this report. This is useful, for instance, when you are printing a report that you use often, but find yourself changing the filter as you go. By prompting for the filter by, you can avoid having multiple reports wherein the only difference is the filter.

If you select **Mark as Printed**, the person requesting the report will be prompted to Mark the items as printed. This item is used specifically in conjunction with **Transaction and Work Order reports**. The Transaction table requires that each item be printed, and that they are marked as printed before it will allow you to move the items to the Asset table. This item will allow you to automatically be prompted for the marking of the Transactions as printed. Also, the Work Order table requires that the work orders be printed before they can be completed. This item allows you to automatically mark the Work Orders as having been printed.

If you select **Destination**, the person requesting the report will be prompted to identify where the report is to be sent each time the report is requested. This can be useful if you have more than one printer or would like to choose a printer on your network when it comes time to print the report.

If you select **Header Style**, the person requesting the report will be prompted to identify which type of header style the report will use. This is useful if you are printing to laser and non laser printers since laser printers can use a box header style and most non laser printers cannot. This choice is often made in conjunction with **Destination.**

If you select **Orientation**, the person requesting the report will be prompted to identify the page Orientation each time the report is requested. If **Orientation** is NOT selected, the report will be oriented as specified by the **Page Design** entry. **Orientation** choices are Landscape or Portrait.

If you select **Summary Report**, the person requesting the report will print in a summarized format. It will not print every asset in the database. Summary Reports should be used in conjunction with **Print Totals For Change In**. See the section titled **Summary Report** later in this Chapter for more information.

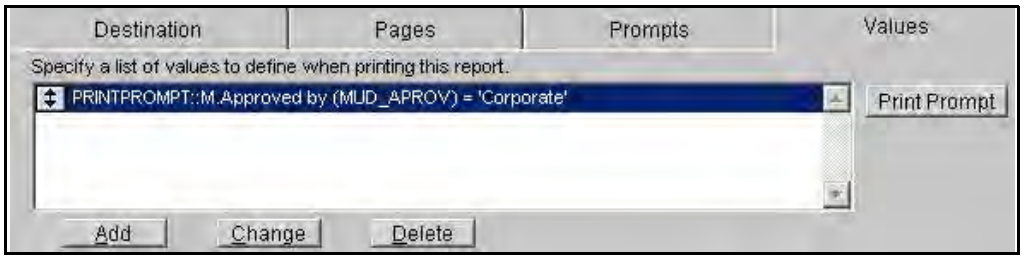
You may wish to create Summary Reports with additional fields for information purposes only. These reports differ from normal detailed reports by not listing every individual asset meeting the report criteria.

For example, you can subtotal on Catalog Number and print Catalog Type, Catalog Description, and Attributes for information purposes.

When you choose the Summary feature, Bar|Scan will print only the last record before a subtotal, for information purposes, along with quantity subtotals for the field indicated with Count, or for dollar amounts indicated with Sum.

If you select **Windows Printer Settings**, the person requesting the report will be prompted with the Windows printer setup box. On this box, you may change the paper size and other Windows options.

The last tab on the Print tab, is the **Values tab** as shown below.



This tab permits you to create and store information temporarily for use in your report. When the report is printed, this information is discarded. We call the place to store this information Memory Variables.

There are many reasons to use temporary information. For example, a number to calculate a sales tax rate, a title for a report, an items that you will be prompted for before the report can be printed.

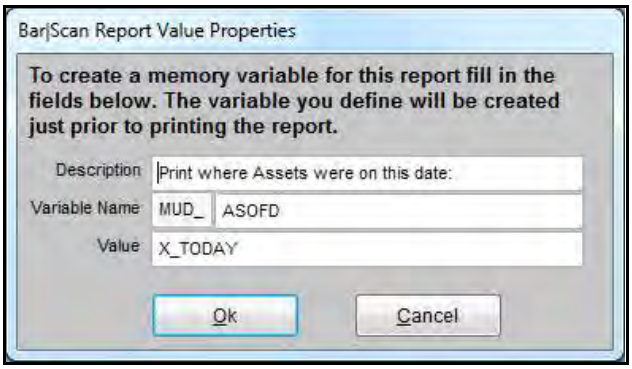
Below is an example of a Memory Variable that can print on the report. See how this is used in the completed example above.

To print the approval on the Titles Page, the string would be:

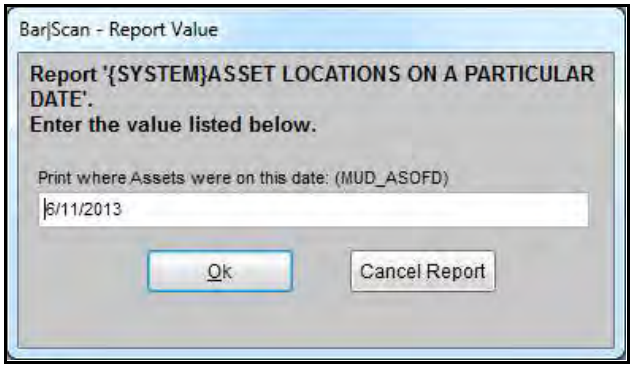
Bar|Scan understands the following date keywords for reports.

x_BegOfMonth	x_EndOfMonth	x_BegOfYear
x_EndOfYear	x_FiscalBegOfYear	x_FiscalEndOfYear
x_BegOfLastYear	x_EndOfLastYear	x_FiscalBegOfLastYear
x_FiscalEndOfLastYear		X_ToDay

Upper/low case doesn't matter. For example, when specifying the value field you could enter as follows:



This might give a prompt as follows (if today is June 11, 2013):



PRINTING A REPORT

Once you have your report the way you want it to look, you can choose to print the report. Simply select the report that you want to print, and then select the Printer icon on the tool bar.

You are asked if you want to go ahead and print the report.

If you select **NO**, you will be returned to the Reports Menu.

If you answer **YES**, the report will immediately be compiled and sent to the printer, to your monitor for a preview, or to a file, depending where you directed the report to be sent.

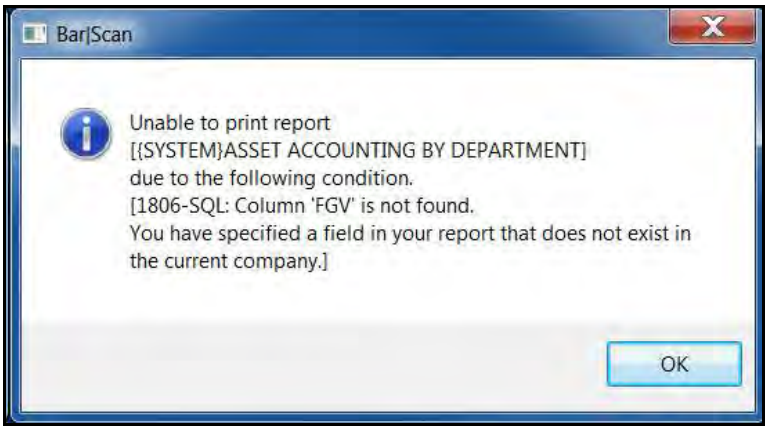
After you answer **YES** and the print process has started, you may press ESC to stop the process.

If you answer **CANCEL**, you will stop this report from being printed and you will proceed to the next report that was previously selected. If this report was the last or only report selected, you will be returned to the Reports Menu.

An Example of a Report Error

At times, you may create a report, that seems logically sorted, filtered, and formatted, but may give you an error message when you attempt to print it.

When you create and save a report, Bar|Scan does not check if it is logical. This process takes place when you begin the print process, and Bar|Scan begins the gathering and comparing of information. Below we have illustrated a type of message that you may receive when you have saved a report, and are attempting to print it.



This message can be caused by a couple of things. The message is there to let you know that Bar|Scan cannot do what you have specified. The information that you asked for when you created it, and the query of information needed to meet your criteria do not match.

You may have specified a filter that asks for a Numeric field, and specified a value with alpha characters, when typing in your data rather than using a look up value. Or, you may have specified a particular Field and then not entered a value at all, so the value would be listed as blank. Bar|Scan will allow you to save both of these reports, because it doesn't check for the report to be valid until you select print.

CHANGING A REPORT

From time to time you will want to change, correct, or add information associated with a report currently existing in the Bar|Scan system.

Bar|Scan will permit you to make a change to the Report Name also. This is useful to alphabetize the reports.

From the Browse Tab, select the report by clicking on it, or use the cursor movement keys to move the highlight bar to the desired report and press ENTER. Then select the Edit tab.

You may now change any of the information related to the selected report.

Remember that System Reports **cannot** be changed. However, you can use them as templates for any new reports which you create. These reports can then be changed.

After you have made your changes, click on the Save button in the tool bar or press the Ctrl + S key combination to save the changed information.

DELETING A REPORT

This feature completely removes a report from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

Removing reports from the system is most often done when a report has been superseded or is no longer appropriate.

To delete a report, select it on the Browse tab. Then, use the range feature to highlight that report. Care should be taken to ensure that this report is the only report selected in your range. Then, simply click on the Delete button on the tool bar, or select delete from the Panel drop down menu.

You will be asked to confirm your choice.

IMPORTING AND EXPORTING A REPORT

There are two ways to import and export a report using the Bar|Scan system. One way is to exchange reports from company to company within your Bar|Scan system. The other is to exchange reports with other Bar|Scan systems, perhaps within your own company, but not on your network.

Bar|Scan reports are really just computer instructions for Bar|Scan to use when you print a report. These instructions can be saved (exported) in a file which can then be brought back in (imported) to the Bar|Scan System. The file can contain instructions for one or more individual reports.

If you have a multiple company system, transferring report formats between two companies is as simple as opening both companies, highlighting the existing report in the Report table, then going to the Main Menu, select File, then Export . . . ▸, to Company. A window will appear, and you can browse to the company that you want to send the report file to.

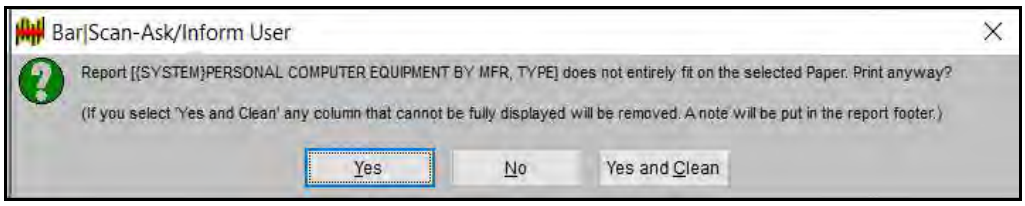
If you need to transfer a report format to another office that is not on your network, you can access the Import and Export feature from the Main Menu, when you have the Report table open. From the Main Menu, select File, then Export . . . ▸, then Data Transfer File. Select the name of your report, and export it as a file that can be placed on a floppy disk.

After receiving the report, the person needing the report would select File, then Import . . . ▸, then Data Transfer File. A window will appear for them to browse to that particular report.

Please see Chapter 14 of this User Manual, Import and Export for more information on this feature.

Adjusting the Look of your Reports

Some of the time when you create a new report, you may have more information selected than will fit on the page. When this happens, you will see a message similar to the one below.



If you have selected the print preview feature, you can view the report before printing a hard copy. By doing this, you can determine if making the widths of the columns smaller will allow the report to fit onto the page, without eliminating information.

If you feel that an adjustment to the widths of the columns is enough to allow the rest of the information to fit onto the page, then, you can go to the columns tab of this report. Select the column that you wish to change the width of, and then select the Properties button. When it opens, there is a field that says Column Width (inches). You may type in a decimal figure to represent the width that you would prefer, making the column wider, or thinner.

If you select the 'Yes and Clean' button then Bar|Scan will remove columns for you until the report fits on the page. A note is put in the report footer documenting that this action was taken as shown in the example below:

Reminder: you can also change the title of the column on a report. To change the title of the column, click on the column you wish to change the title for, and click on the Properties button. You can now type in what you wish the title to print. A comma placed in this field will cause the next portion of the title to be printed on a different line.

CATALOG REPORTS

From the Main Menu, select File, then Open . . . ▸, then Reports . . . ▸, then Catalog. You will see a window that lists all of the Catalog reports that are in your Company Asset Database.

System Reports

System reports are those reports supplied to you as part of the Bar|Scan System. Bar|Scan provides three different types of System Catalog reports.

The *Bar Code Menu List* provides you with a current list of different Catalog items which are printed in order of Catalog Type. It is the best way to demonstrate Bar|Scan's ability to print bar codes on your printer, and they can be used as part of the inventory process.

The *Catalog List* feature permits you to print a report containing the items currently in the Catalog table, with no bar codes. You can print a report containing one, a group, or all Catalog items. You can select this report in order either by Catalog number, or by Catalog Type.

Catalog Sheets are provided to record the information for a single Catalog item. The sheet also provides space for a photograph or image of the item. You can select Catalog Sheets in order either by Catalog number, or by Catalog Type.

You require both a printer and the Imaging Module in order to print images stored on your computer.

The *New Catalog Data Collection Sheets* provide you with a form to assist in the collection of new Catalogs for entry into the Catalog File.

TRANSACTION REPORTS

After information is transferred from the Mobile Device into the Bar|Scan system it stays in a Transaction table until it is validated for accuracy. Bar|Scan does extensive error checking on this information before it is accepted into the system.

The system reports produced by the Transaction Report feature provide both an audit trail and a list of errors that can be corrected before the information is entered into the Asset table.

Unless checked OFF on the Company Settings Screen, this report **MUST** be run and validation **MUST** be accomplished, and the items **MUST** be marked as printed **BEFORE** the information can be moved into the Asset table.

From the Main Menu, select Bar Code Transaction as the type of reports that you wish to access. Select the report that you would like to access from the Browse panel, and then select the Edit tab.

If you print one of the System Bar Code Transaction reports, you will be asked if you want to mark all of the Transactions as printed. Answer **N**(o) ONLY if you are reprinting the Transactions and you are certain no new transactions have been added, and no changes have been made, since the last time the Transactions were printed.

After you respond Y(es) to the above question, the Bar|Scan system will process the information, and mark all of the transactions as printed. During this process, messages will be displayed to inform you of the progress of the processing.

Remember: Unless you disabled this feature, transaction reports **MUST** be printed and validation **MUST** be accomplished, and the Transactions **MUST** be marked as printed **BEFORE** the transaction information can be moved into the Asset table.

LOCATION REPORTS

After you have entered your organizations into the Organization table, or have decided to not use them, and have entered the locations into Bar|Scan, it is easy to print your location reports. You will use the directions at the beginning of the chapter to set up the report screens. After you have these screens set so that your report will print the way you want it to, then you need to tell Bar|Scan what to print.

Hint: Location Reports are **not** needed to do your inventory if you used the Room Tag feature of Bar|Scan and have already applied Room Tag labels to your locations and have previously associated the labels to locations by using the Mobile Device, or by entering the Room tag numbers into the Location table. They are also **not** needed if your download all of your locations into your Mobile Device.

From the Main Menu, select Location as the type of reports that you wish to access. Select the report that you would like to access on the Browse panel, and then select the Edit tab.

You can look over the information on what is to print to make sure it is correct, and if it is, you can select Yes to begin printing this location report. If you answer Yes, the Location Report will immediately be compiled and sent to your monitor (if you selected preview), to the printer, or to a file. If you answer No, you will be returned to the Report selection window.

Remember, if you answer Yes, and you need to stop the report, you may press ESC to stop the process.

LOCATION HISTORY REPORTS

These reports are similar to Asset reports in that they can provide useful information about the location history of the assets currently recorded in the system.

These reports give a different perspective on your assets and are especially useful to report on turnover or movement.

Basically, use these types of reports to ask questions like "what has moved in or out of a location?". For example, what assets have been returned to my repair location or what assets have been shipped from my warehouse?

Remember that just like an Asset report, these reports can be defined to report changes for a particular time period by using the Filter feature. For example, what assets arrived at my receiving area during the month of January?

ORGANIZATION REPORTS

After you have entered your organizations into Bar|Scan, you may print Organization reports. You will use the directions at the beginning of the chapter to "set up" the report screens. After you have these screens set so that your report will print the way you want it to, then you need to tell Bar|Scan what to print.

Hint: Organization reports are **not** necessary to do an inventory since organization items can be included in the Location Report or downloaded into your Mobile Device.

From the Main Menu, select Organization as the type of reports that you wish to access. Select the report that you would like to access on the Browse panel, and then select the Edit panel. You can look over the information on what is to print to make sure it is correct, and it is you can select Yes to go ahead and print this Organization report. If you answer Yes, the Organization Report will immediately be compiled and sent to the printer. If you answer No, you will be returned to the Report selection window.

Remember, if you answer Yes, and you need to stop the report, you may press ESC to stop the process.

PERSONNEL REPORTS

After you have entered your personnel into Bar|Scan, you may print Personnel report screens. After you have these screens set so that your report will print the way you want it to, then you need to tell Bar|Scan what to print.

Hint: Personnel reports are **not** necessary to do an inventory since a list of names can be downloaded into your Mobile Device.

From the Main Menu, select Organization then Personnel as the type of reports that you wish to access. Select the report that you would like to access on the Browse panel, and then select the Edit panel. You can look over the information on what is to print to make sure it is correct, and it is you can select Yes to go ahead and print this Personnel report. If you answer Yes, the Personnel Report will immediately be compiled and sent to the printer. If you answer No, you will be returned to the Report selection window.

Remember, if you answer Yes, and you need to stop the report, you may press ESC to stop the process.

WORK ORDER REPORTS

The Work Order reports provide you with a high level of control over your list of assets. Work Orders work in conjunction with the Mobile Device to allow you to control both the movement of assets, as well their inventory status.

Reports can provide information on pending, active, completed, and late Work Orders. They can be printed in any order including Priority, Crew Assignment, Due Date, and Work Order Number.

You can have custom, or specially formatted Work Orders printed. Several have been provided with Bar|Scan. These are saved as formatted files in the Reports folder.

Important: In order to get maximum utilization from the Work Order reports, you must have the Work Order Module. You must also tag your assets and build your asset file prior to implementation of work orders. It would be difficult to receive and process orders for assets if they were not yet in your asset file. The original entry of new assets into the system is usually accomplished using the Mobile Device.

COMPONENT REPORTS

Component Reports typically require columns from more than one Table. Below are the relevant Tables to choose from in the Bar|Scan Pick Fields List.

Asset Component - This is a mandatory column required to link the Parent asset to the component. You will need to select the Asset Number from this table in all reports. You can set the column properties so that the Asset Number does not print.

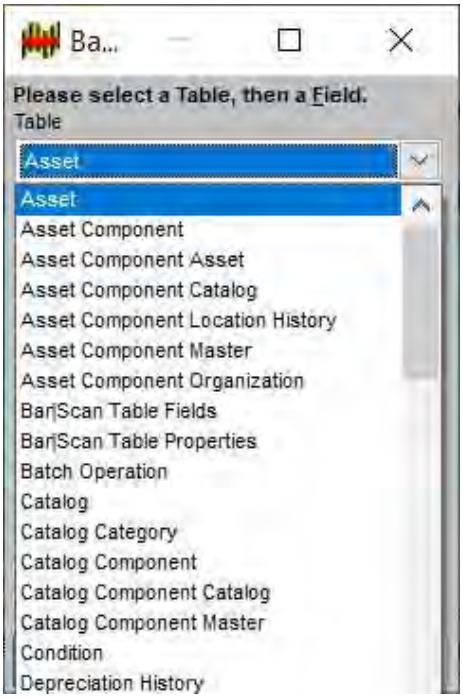
Asset Component Asset - This Table contains all of the Asset Information of the component. It is the same type of information that the parent has, e.g. serial number, owner name, etc.

Asset Component Catalog - This Table contains all of the Catalog Information of the component. It is the same type of information that the parent has, e.g. type, description, manufacturer, etc.

Asset Component Location History - This Table contains all of the Location History Information of the component. It is the same type of information that the parent has, e.g. current building, prior building, etc.

Asset Component Organization - This Table contains all of the organization Information of the component. It is the same type of information that the parent has, e.g. org code, division, etc.

All of the above Tables are related to the Asset Bill of Materials. The next two tables are related to the Catalog Components as shown on the following example.

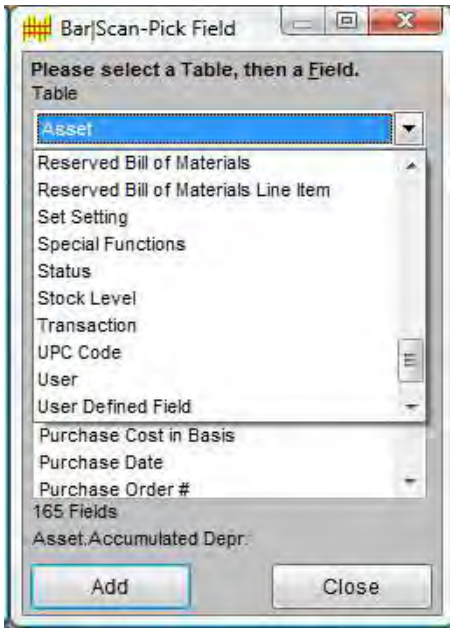


Catalog Component - This is a mandatory column required to link the Parent Catalog to the component. You will need to select the Catalog (XX9999) from

this table in all reports. You can set the column properties so that the Catalog does not print.

Catalog Component Catalog - This Table contains all of the Catalog Information of the component. It is the same type of information that the parent has, e.g. type, description, manufacturer, etc.

All of the above Tables are related to the Catalog Components. The next two tables are related to the Reserved Bill of Materials as shown on the following example.



Reserved Bill of Materials - This Table contains all of the Reserved Bill of Materials items other than the Line Items, e.g. Purchase Order #, Requesting Organization, Date Completed, etc.

Reserved Bill of Materials Line Item - This Table contains all of the information in the Line Items, e.g. Asset #, # Requested, etc.

MISCELLANEOUS REPORTS

This category holds any reports that do not fall into the other categories. These may include the list of valid conditions, Manufacturers, Attributes, etc.

ALL REPORTS

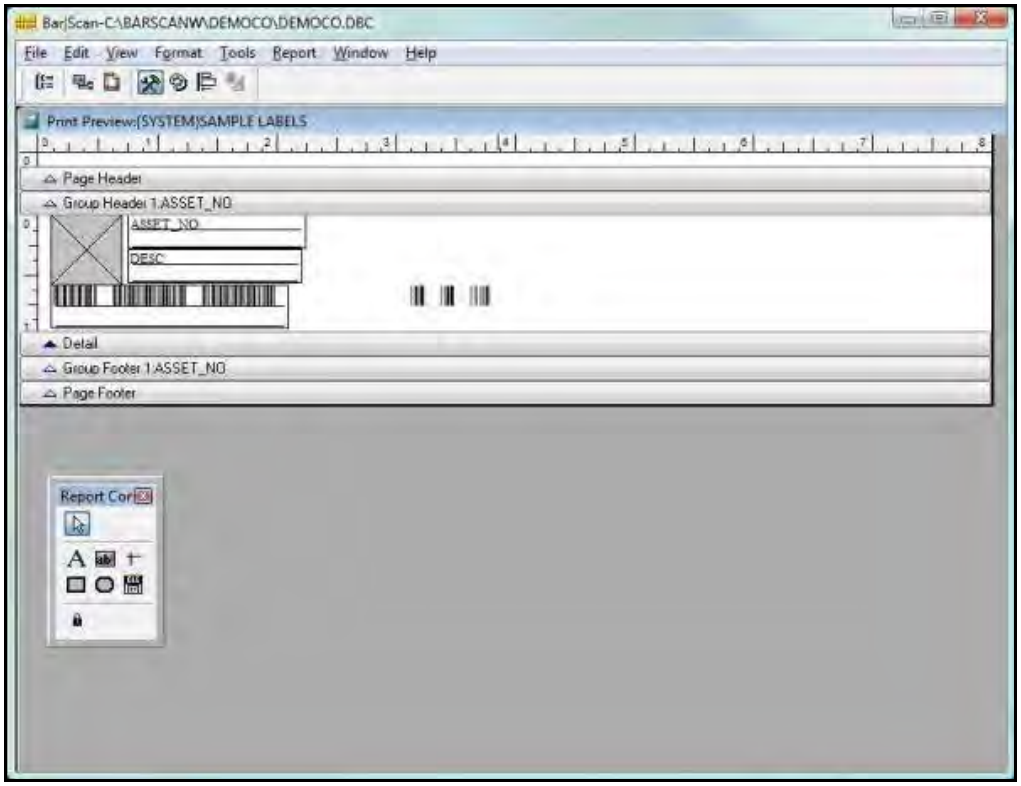
This option allows you to access any and all of the different reports that are contained in your Company Asset Database.

Although no examples are provided as System Reports, you can create a report on any Table in Bar|Scan, even the User Table. Reporting on Bar|Scan Tables is controlled in the Table Properties Table. For more information on how to make Tables available for reporting, see *Chapter 4 - System Overview.*

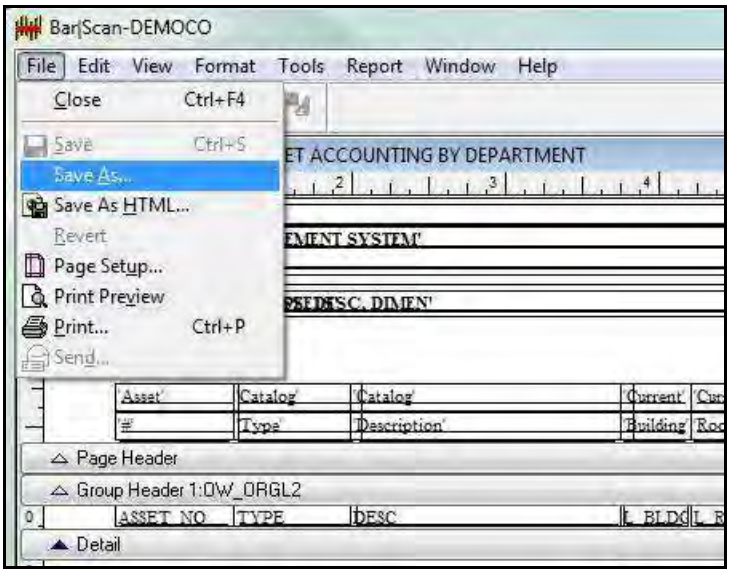
PRINTING BAR CODE LABELS

Custom Designed Labels

Answer: Yes, you can design your own label. A sample label is included in the Bar|Scan System reports. The Report name is "{System} Sample Labels". You can access the report designer by placing three exclamations in the beginning of the "Optional Format File" field like this !!!. You will still need to include the format file name. When you then select the Preview Button, the report designer will be displayed similar to the example below:



You must save the format file during or upon completion of any edits that you make in the report designer. To do this press File then Save As which is shown in the following example:



You should navigate to the barscanw\report folder to save the format file.

While we cannot cover all the features of the report generator, basic functions include the ability to add or remove individual fields, move fields, justification within the field, stretch or shrinking the field areas and so forth.

This feature is for more advanced users with some layout experience in other applications. You can also contact your Bar|Scan Dealer if you would like them to create a label for you.

Avery Label Stock

Bar|Scan's report generator has a label generating function built-in. However, you may wish to invest in better quality pre-printed labels for durability and readability. A sample system report can be found by opening the All Reports Icon.

Bar|Scan is preloaded with the specifications for many popular Avery labels. An Avery label is selected by specifying the following in the Optional Format File text box of a report:

LABELS:AVERY XXXX

Where XXXX is the specification of the Avery label that you desire.

Since labels have very little space for printing, a report normally consists of only one or two fields and you must also pay attention to your default font size. Note that the designator LABELS is followed by a colon, then the word AVERY. There are no spaces until after the word AVERY, then a space separates it from the label number that you want. The following is a complete list of the Avery labels that Bar|Scan will recognize: 4143, 4144, 4145, 4146, 4160, 4161, 4162, 4163, 4166, 4167, 4168, 4169, 4240, 4241, 4249, 4250, 4251, 4253, 4254, 4255, 4256, 4257, 4258, 4259, 4266, 5095, 5096, 5097, 5160, 5161, 5162, 5163, 5164, 5165, 5167, 5196, 5197, 5198, 5199-F, 5199-S, 5260, 5261, 5262, 5266, 5267, 5383, 5384, 5385, 5386, 5388, 5389, 5395, 5660, 5662, 5663, 5883, AVERY 5895, 5896, 5897, EAL 04, L7160, L7161, L7162, L7163, L7164, L7165, L7166, L7167, L7562, L7563, OML 101, OML 102, OML 103, OML 104, OML 105, OML 202, OML 203, TAB1 102.36, TAB1 107.23, TAB1 107.36, TAB1 107.49, TAB1 89.23, TAB1 89.36, TAB2 107.23, TAB2 107.36, TAB2 89.23, TAB2 89.36

You can also use Bar|Scan to mailmerge Avery type labels. There are several ways to create Avery labels. Here is just one of them. Try the following steps:

1.) Using Bar|Scan, create a report with one or more columns, the columns you wish to place on the Avery Label.

2.) On the print tab select File as the destination. and on the File Format box, Select Delimited as your format. Unless you specify a unique file name, the file is barscan.txt and is located in your barscanw folder.

3.) Close Bar|Scan and open Microsoft Word or any other word processor that has mail merge capability.

4.) If you use Microsoft Word, you can now use the Word mailing labels feature with mail merge to create the labels you wish. Begin by selecting Tools . . . ▸ Mail Merge from the Word main menu. Then select create "mailing labels". Then select Get Data. When Word asks for the data source, use the delimited file you created in step 2 above. Several standard Avery label sizes are supported. Word's mail merge helper can step you though the process if you need help. Remember that you also need to format your bar codes correctly, see "how to create barcode menus" on this page.

If you plan on producing a large number of labels or would like Bar|Scan to produce labels directly on a regular basis, your Bar|Scan Dealer can design a custom Format File for you. Most Format Files can be designed in only a few hours.

BAR|SCAN® MOBILE©

THE BAR|SCAN® MOBILE©

The following are instructions for the Bar|Scan® Mobile© for the Android Operating System. The Bar|Scan Program Version is 1.0.0 or greater. The hardware includes but is not limited to: Zebra Technologies EC50, MC3200, Nautiz X6, and your smart phones and tablets.

Bar|Scan Mobile is compatible with Android version 9 (pie) and newer. The application may run on older Android versions, but it is not supported.

Your Android hardware may have certain features or manufacturer's specific qualities that may make the application incompatible with your device. Therefore, you may wish to install the application for testing prior to activating your Bar|Scan Mobile subscription.

Talk to your IT department about installing this application. Get them on board to ensure you have the right Wi-Fi networking and security policies in place.

Determine your acceptable use policy for the device, especially around photographs, social media and device security. There's a good chance you already have one and need to review and tweak it for the new use case.

INTRODUCTION

Android based mobile computers are portable, PDA format computers that are using versions of the Android operating system and typically require an imager, scan engine or camera that scans or decodes bar coded information, Wi-Fi, Cellular, or USB connectivity to permit bidirectional communications with Bar|Scan on the PC host is also required.

There is a set of videos on our website that can provide you with additional information for operating Bar|Scan. These are titled 'Quickstart Overview Videos' and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

Installing Bar|Scan Mobile

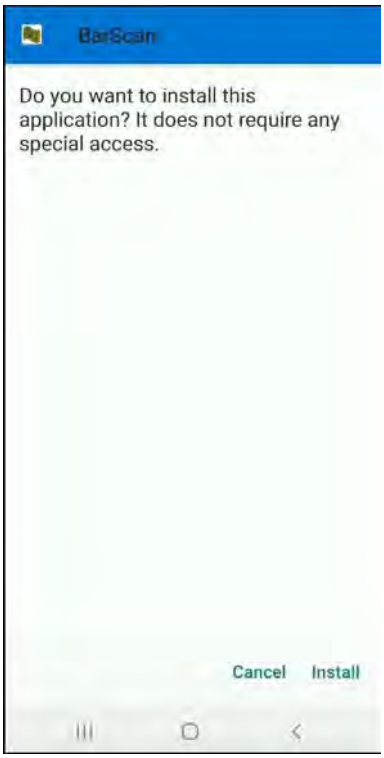
The android mobile application (APK) can be obtained from Bar|Scan, Inc. or your Bar|Scan Dealer. Copy the application to your device's download folder or desktop then click to install.

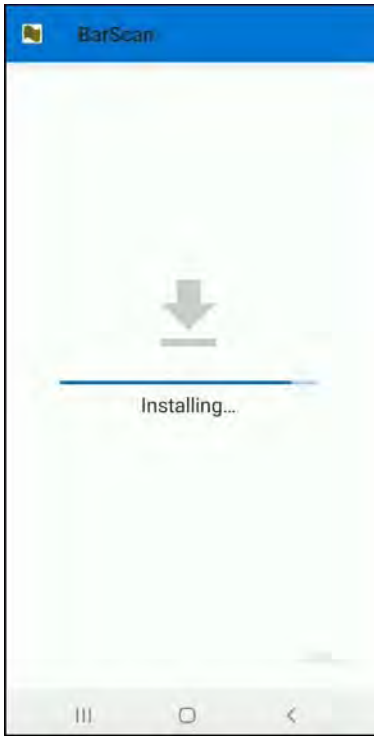
If you receive any security warning that your device, smart phone or tablet is not allowed to install the Bar|Scan application or "unknown applications from this source" then open your device's Settings Screen and select the 'allow the app installation'. Depending on your version of Android, the steps may vary.

Typically this is done by selecting your Settings Icon. Tap the search icon within this screen. Type "Unknown" into the search. When found, select 'Install Unknown Apps'. Then select or use the slide bar to turn on 'Install unknown Apps'.

You will now see a screen similar to the one at the right top.

Click on Install and a screen similar to one at the bottom right will appear.





Licensing the Bar|Scan Mobile

Once installed, Bar|Scan® Mobile© can be used immediately with sample data that is included. The sample data is correlated with the sample BarScan database on the desktop called DEMOCO and is discussed in the Bar|Scan User Manual Chapter 19 - Training With Demo Database.

If the device was not supplied by us, we recommend that you test the application prior to performing a real inventory. Make sure to test the barcode capture, using your camera or imager to make sure that it functions and can read a barcode. If you have assets with two dimensional (2D) barcodes, please do a capture test on these also. Some devices require the activation of the device's flashlight to properly read a barcode. This can be turned on in the BarScan Application as discussed later in this chapter.

Because of the number of different Android operating systems and platforms, we cannot guarantee compatibility with all hardware.

The only function that the unlicensed Bar|Scan® Mobile© cannot do is synchronize with the Bar|Scan desktop application. For this you will need to obtain a subscription from us.

Once you have completed your testing and are ready to license the application, select Tools from the About menu then the LEGAL tab as shown at the right:

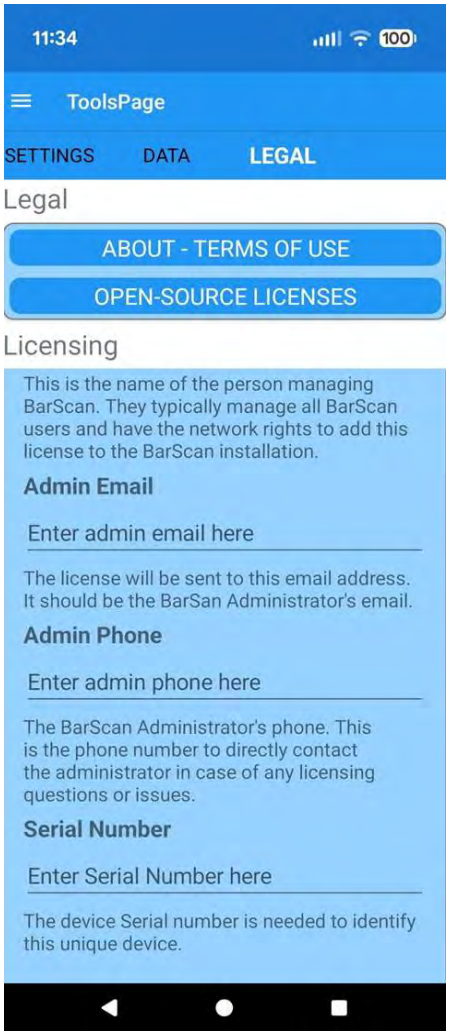
Complete the Licensing information including the administrator email. This is the email of your BarScan Administrator (or Master User) whom we may contact if further support is needed. It may not be the email associated with this device.

Enter the phone number of the BarScan Administrator. This also may not be the phone number of this device.

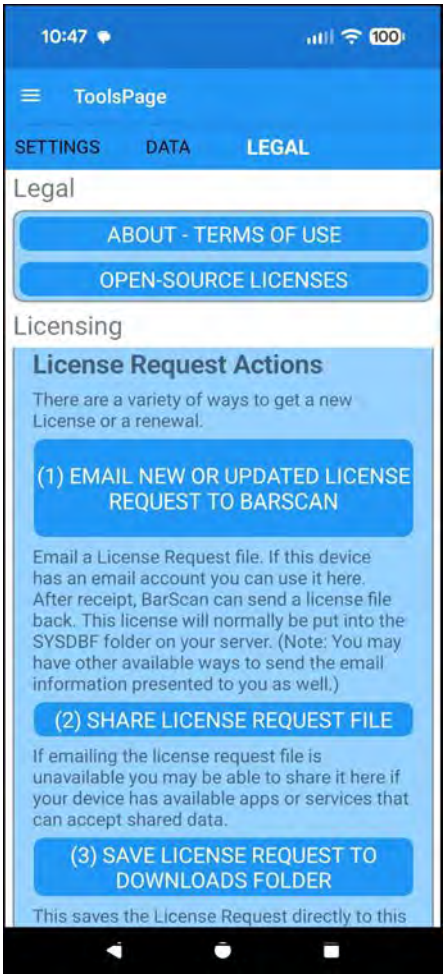
Enter the serial number of the device. This may be located on the back of the device or in the battery compartment.

For devices without a visible serial number, you may see it on the Settings -▸ Device Tab.

If this is a mobile phone with no visible serial number and there is no serial number on the Settings -▸ Device Tab then enter the mobile phone number with no special characters, .e.g. 2125551234.



Select ‘REQUEST NEW OR UPDATED BARSCAN LICENSE’ a the bottom of the LEGAL Panel. The application will create an email using your installed email application.



There are three ways to request the license. If an email client is installed on this device then option (1) is the best choice.

Option (2) Sharing is an Android function that allows files to be moved from the device in a variety of ways. Android itself decides what is available based on a lot of factors the BarScan Mobile Application doesn’t have access to. Installed applications can provide destinations (for example, a Brother printer app goes to a printer, a OneDrive app goes to an external file).

You may have applications that may be thought of as services such as Gail.

This ‘Share’ function is the same function that you see on your Android phone when you click on any ‘Share’ menu option in Android.

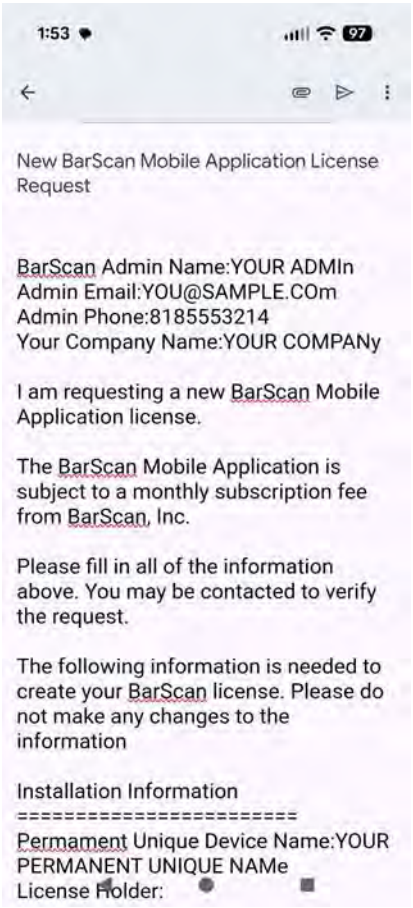
Option (3) would typically require a manual download of the file. For example, connecting a USB cable and using your desktop computer to browse for the file.

You will need to complete the section in the email as shown at the left before sending the email.

Your device will show you a message if no email application is installed or the email application is not setup. Install your email application and try again.

Here is a sample of a license request that will be sent.

Bar|Scan, Inc. will reply to your request via email with a permanent unique device license file (file extension .rdi) for you to manually copy using Windows File Explorer to your desktop (or server) BarScan (\barscanw\sysdbf\ folder). Once completed, start BarScan on your desktop and use the Synchronization feature with the device's BarScan Mobile application and it will be recognized as a fully functional active device.



Wi-Fi Capability

Most devices, smart phones and tablets are Wi-Fi capable, meaning that they that have a built-in form of wireless local area networking (WLAN) based on the IEEE 802.11 specifications.

The Wi-Fi technology is independent of the Bar|Scan Mobile. As long as the network and hardware are in place and operable, Bar|Scan can send and receive information between the device and the Bar|Scan database residing on the host server or host PC.

Optionally, if you use Wi-Fi, you can setup an instance of Bar|Scan on your server utilizing our Scripting Feature to automatically launch Bar|Scan and have it ready to synchronize.

Cellular Capability

Typically, you would use your Wi-Fi connection to synchronize your phone or tablet with your BarScan database. When there is no Wi-Fi connection available, you can use your cellular service to synchronize. Keep in mind that you do not require an 'always on' Wi-Fi connection since you have downloaded your asset and pop-up information into your device. So, connecting via Wi-Fi or cellular service is only necessary when you need to synchronize.

There is a setup process that is required before you can begin. You will need to setup a Virtual Private Network (VPN). Next, you will add the network to you phone or tablet in settings (Settings -▸ Network -▸ VPN). Once completed, you will be able to synchronize the device. Note that many business already have a VPN enabled so do check with your IT Staff prior to setting up your connection.

USING BAR|SCAN MOBILE

If you have ever used an Android phone, you are probably familiar with the basic features of a device, smart phone or tablet. If you have never used one before, you should refer to the product reference guide that came with your device. Items such as power and memory management, and using other pre-installed applications are not covered in this Chapter. This chapter will concentrate on the Bar|Scan Mobile software.

You should know how to turn the device on, charge or change the battery, and any other actions related to setting up the device, i.e., calibrate the screen, set the time and date (if not automated), connect to your Wi-Fi network or it's cradle or USB cable. If you feel uncertain about any of these features, please refer to the manufacturer's product reference guide that came with the device.

Your device accepts information "hand entered" by the user as well as information captured by it's camera or scanned with it's laser scanner.

Turn the device on by pressing the power button and select the BarScan Mobile application.

When selecting the scan icon (shown at right) in the application's TAG or TAKE screen, hold the unit at a distance that brings the bar code into focus, ensuring that the camera or scan beam covers the entire bar code. Depending on the model of your device, a sound may indicate a successful scan.

Your device is initially used very extensively to tag all of your company's assets. After this initial activity, the device will be used to both "Tag" assets as they are acquired, and to "Take" your company's periodic asset inventory when the inventory needs to be updated. The device will hold information for thousands of items.

You can synchronize and download a significant portion of your Bar|Scan inventory data into the device. How much you download is dependent on the new information that you wish to collect, the memory and processor speed of the device, and the wait time needed to display the information that you require to perform your inventory.

A user can create configurations for the inventory process at any point on the PC portion of Bar|Scan. These configurations are then downloaded into the device when the desktop and device synchronize. In addition the user can download various Bar|Scan Tables such as Asset, Catalog, Organization, Location and Owner Names into the device. This means that Bar|Scan bar code menus do not need to be printed for these items except when the menus are more convenient.

When using Bar|Scan, the windows you see on the screen of the device are collectively called "Dialogs". The very top of the Dialog is called a Menu bar. The Menu Bar will display the title of the Dialog; such as "Inventory-Tag".

Battery Life

If your device's battery is draining quickly, try adjusting the power. There are several settings that can be adjusted to help conserve power. The general ideas are: lower screen brightness and turn off settings like NFC, Bluetooth® and Wi-Fi when not in use.

These adjustments are all done from the Android settings and are documented in the manufacturer's reference manual.

No Bar|Scan Data Loss Due to Loss of Power

For the device models referenced on page one of this Chapter, if your device loses power, both your Bar|Scan application program and the data that you collect are permanently saved.

Once you charge or change the battery, Bar|Scan Mobile will continue working normally with one possible exception. In the case of some smart phones or tablets, if the device does not have access to cell or data service, it's clock may not be reset. In this case, you will want to set the clock manually before using BarScan Mobile.

For the devices not referenced on page one of this Chapter, the ability to save your data is a function of the device itself, what kind of memory is installed, and the user backup plan.

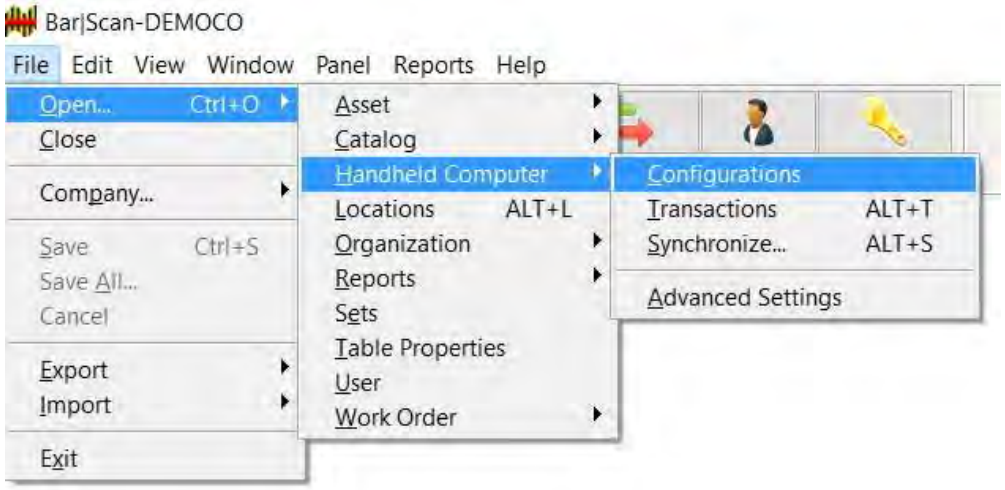
CONFIGURE

Bar|Scan Mobile is specifically prepared (configured) to prompt you for certain information about each asset. When you use Bar|Scan to inventory an asset, the data that you will collect can be customized to meet your company's requirements. Most often you will be collecting the location possibly including the organization, or department information, and personnel for the asset. You will collect a Catalog Category and Number (the assets description), the Asset Number, and then any other data that may be pertinent for that asset, i.e., serial number, and perhaps a comment about that item.

More often than not, you will want to change the prompts that are turned on by default. You can change the items that you will be prompted for by creating a new configuration in your Bar|Scan desktop program.

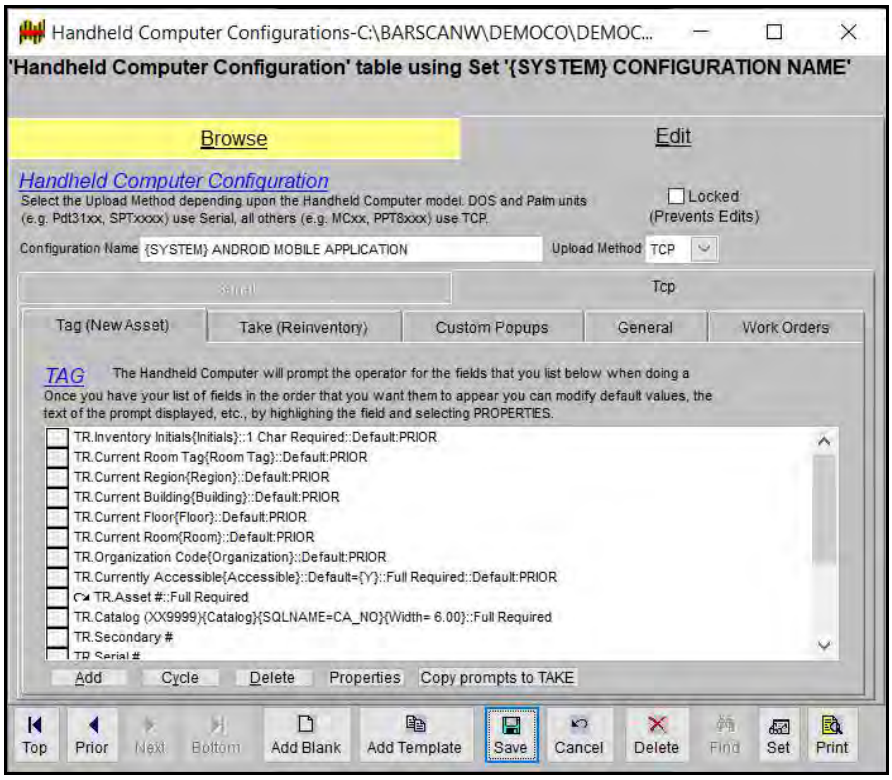
If this is the first time you are using the Bar|Scan program, you will need to review the default Device Configuration on the desktop portion of Bar|Scan.

Start Bar|Scan on your PC workstation. From the Main Menu of Bar|Scan select File -▸ Open -▸ Handheld Computer -▸ Configurations.



Select the **"{SYSTEM} ANDROID MOBILE"** configuration.

When you select the Edit Tab on Configure, you will see a screen similar to the following:



We recommend you use the Add Template feature to create a new configuration from any system configuration and not change the system configuration.

Note that there are five tabs on the Edit Screen. They are labeled Tag, Take, Custom Pop-ups, General and Work Orders. Each section can be independently edited to customized the prompts for each type of inventory.

There is also a section at the top of the screen which contains your TCP Communications settings (discussed earlier). The device uses only the TCP Upload Method and not serial port settings. Therefore you use either Wi-Fi or can plug the device into any available USB port.

It is not necessary to tell Bar|Scan where the cradle or cable is plugged in. Bar|Scan will automatically locate the device.

Important: You can create and save multiple configurations for each of your devices and/or Company databases. In this way, each device can contain a different configuration and a different set of downloaded information from various Bar|Scan Tables such as your Location, Catalog or Asset Table. Note that the device can contain only one Configuration at a time.

Default Prompts

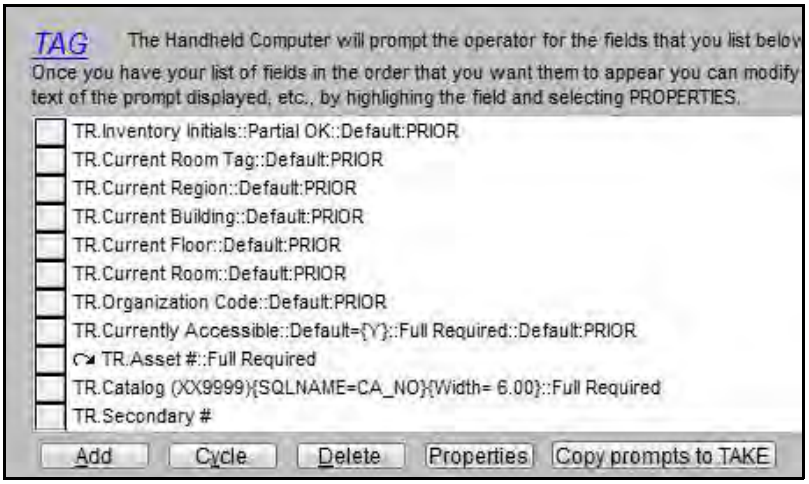
The following items are selected for a Tag by default: Inventory Initials, Room Tag, Region, Building, Floor, Room, Organization Code, Accessible (Y/N), Asset #, Catalog, Serial #, Status, Condition, Purchase Order #, Name, and Inventory Comments.

The following items are selected for a Take by default: Inventory Initials, Room Tag, Organization Code, Accessible (Y/N), Room Tag, Asset #, Status, Condition, Name, and Inventory Comments.

Bar|Scan Mobile was designed with the intent that the user would most likely be using a "Site" location type. If you are doing an inventory that is to use a Vault or a Pallet type of location, make sure that you change your configuration to download the appropriate prompts. Location types are discussed in the Chapter 4 - Location Table.

Configuring Tag

Tag and Take are each configured independently. Let's start by concentrating on configuring the Tag function as seen in this area of the Configuration screen:



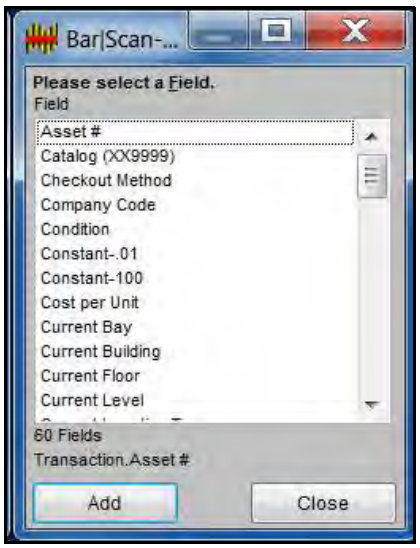
The Bar|Scan fields in the list are the questions that will be prompted for by the device. In this example, the device will begin by asking for the Inventory Initials, the Current Region, Current Building, etc.

The order that the prompts are shown is also the order in which the device will prompt. You can change the order of the prompts by dragging the individual prompts up and down in the list.

There are also five buttons below the list: Add, Cycle, Delete, Properties, and Copy Prompts. Let us discuss these now.

Add

If you click on the Add button, a Look up window similar to the one below will appear.

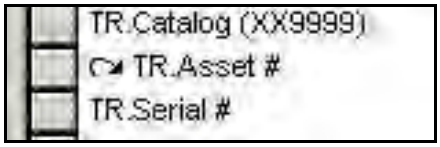


You may select one of the prompts by using the mouse, or by moving the highlight bar to the desired item and pressing ENTER, or by clicking on the ADD button. The <shift> and <Control> keys can be used to add multiple prompts.

Cycle

Once you save an asset, the Bar|Scan program in your device can be configured to cycle back to any prompt during your physical inventory. Most users will want to cycle back to Catalog in "Tag" mode and cycle back to Asset # in "Take" mode. However, this can be changed. For example, you may not wish to cycle back to Catalog if all items in your inventory have the same description. In this case you will want to cycle back to Asset #. Another example, if you have only one asset per location, you may want to cycle back to Room Tag.

If you click on the Cycle button, window similar to the one below will appear.



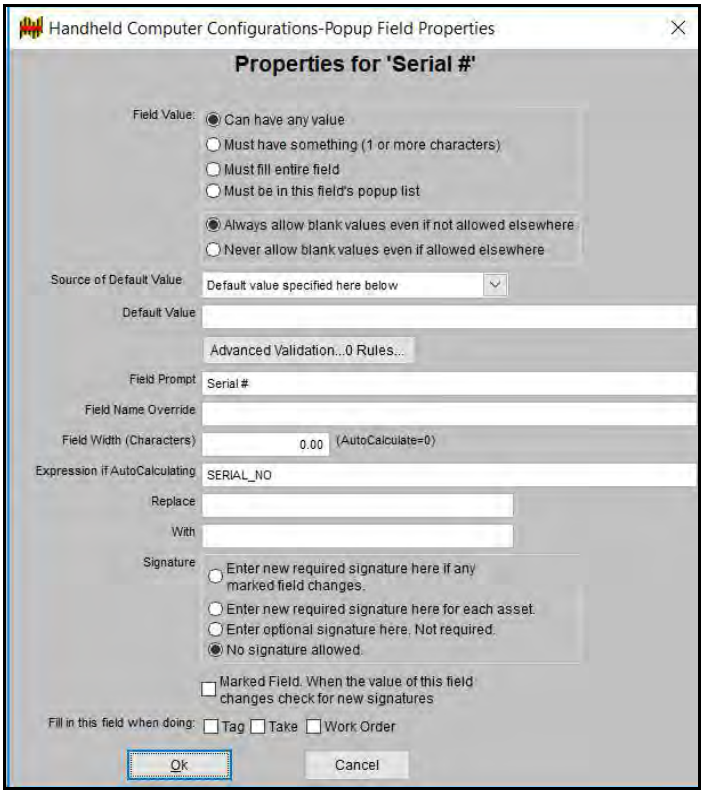
The cycle icon will be placed in front of the prompt where the device will cycle back to. You can change the cycle point by selecting another prompt and pressing the cycle button.

Delete

Delete will remove any prompt that is highlighted. There is no confirmation.

Properties

If you click on the Properties button, a box similar to the one below will appear.



You may turn the first three items on and off by clicking on the appropriate checkbox.

You can instruct the device that a blank response or “blank field” is ok. For example, in the above box, the “blank field” is not checked which means the Asset Number prompt requires a response.

You can also accept “Partial fields”. For example, in the box, the Asset Number is set to 0 (autocalculate). This means that the device will only accept a bar code if it is the length specified on your Company Settings screen. If you check “Must have something (1 or more characters)”, then the device will accept any length of Asset Number up to the length specified on your Company Settings screen.

The opposite of “Must have something (1 or more characters)” is “Must fill Entire field”. Checking this box means that the device requires the entire field to be completed. In the above box, the Asset Number requires a response of exactly the number of characters specified on your Company Settings screen.

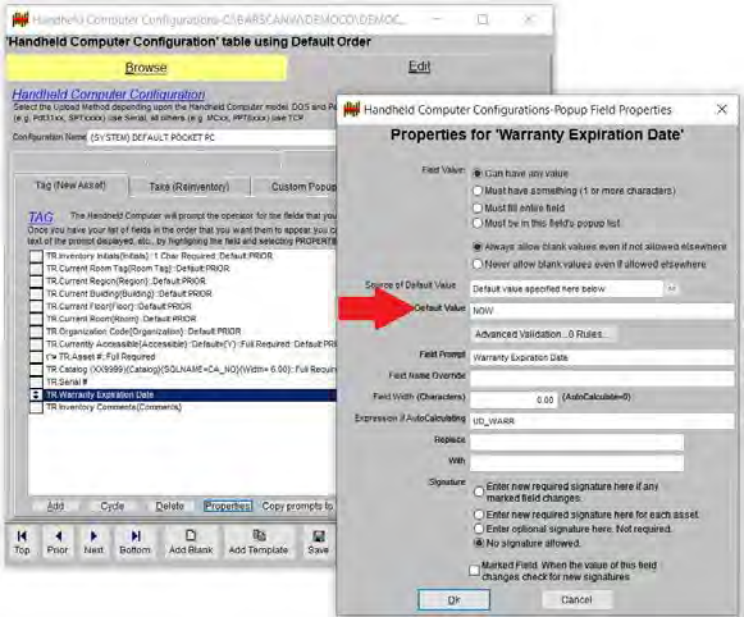
Source of Default Value

There are two choices for a default value as the response to a prompt. You can enter a default value on this screen which will be used in the device or you can keep the value from the prior asset entered.

Default Value

You can enter a default value to appear in the device. For example, if you would like to have a default response for the Name prompt of “UNASSIGNED”, type it in here.

There is a special case called “NOW” and ‘TODAY’ which will input the current date and time, depending upon the type of field. If the field is a date field, these will insert today’s date as the default. If the field is a time field, it inserts the time. Of course, NOW looks better with a time field and TODAY looks better with a date.



Advanced Validation (not available in Android devices)

This feature allows a list of different validations for a single field based on the value of a field in the field list. Because Advanced Validation is a feature that will not be used in most configurations, it is discussed in detail at the end of this section (before the Mobile section).

Field Prompt (Change the Name of a Prompt)

You can change the name of a prompt that appears in the device. For example, if your inventory personnel are used to calling the Asset Number a bar code, you could change the words 'Asset Number' to say 'Bar Code'.

Simply type in the new name into the Field Prompt. For example, if you wanted to change the System # prompt to say Old Inv. #, simply highlight the System # prompt in the list and select Properties. Then type "Old Inv. #" into the Field Prompt.

Note: changing the name of the prompt will not change the properties of the prompt, it will only change the name that appears for that prompt on the device during a Tag or Take. It also does not change the name in the Bar|Scan program on your Personal Computer. This can be changed by using Bar|Scan's User Defined Fields (UDF) Module on the PC.

Field Name Override

You can select a Field Name Override, a feature for advanced users. If you understand SQL, this may be a feature that you would want to use. You can use this feature to make a special type of data entry function such as combining two fields.

Field Width

This is where you can change the maximum width of a response that will be accepted in the device. If you enter "0" (zero), the maximum width is determined by Bar|Scan according to the length set in the PC portion of the Bar|Scan database.

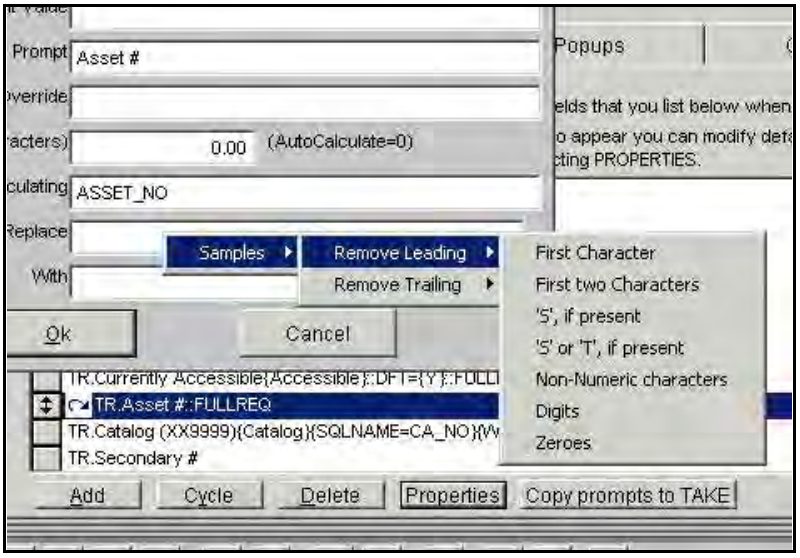
The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Expression if AutoCalculating

This field contains the Bar|Scan field that will be used to Autocalculate the Field Width. Do not change this information unless you are an advanced user. For advanced users: you can modify the result of the entered information such as trimming or formatting the entered information.

Replace and With

These two fields are used together to change the bar code information after it has been captured. For example, this is useful for removing Check Digits from the scan. You can right click to choose a number of formatting functions that are available as in the example below.



Signature (not available in Android devices)

There are four signature options. The default is 'No Signature'. By making another selection, you can incorporate a signature with any prompt. For example, you can obtain a signature for a Purchase Order, User Name or for a comment.

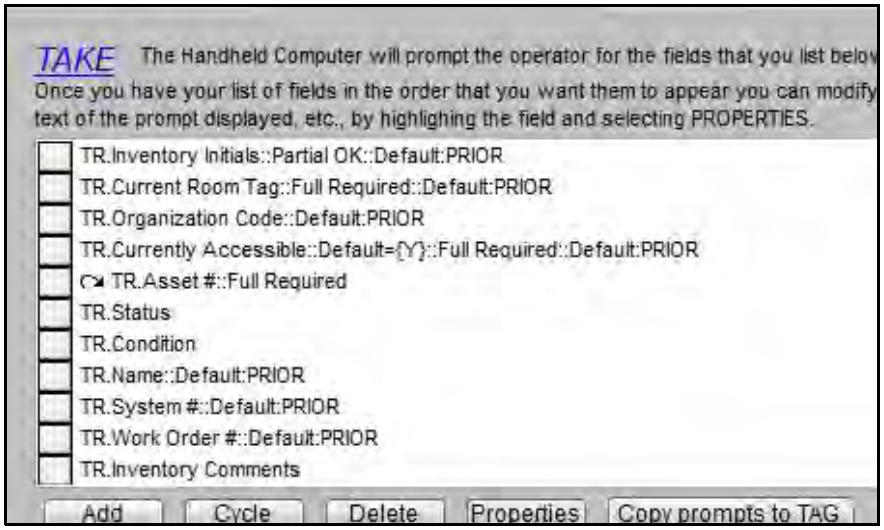
Copy Prompts to Take

Once you have completed the "Tag" tab, you might want to use your work as the basis of your "Take" tab. Press this button to copy your configuration to the Take tab. After this is completed, you will most likely want to edit the Take Tab as

normally there will not be the need to collect the same number of fields. For example, the Catalog and Serial Number are usually not collected in the device during the Take mode as the information was collected during the initial inventory.

Configuring Take

Tag and Take are each configured independently. Now that we went through the process of configuring the Tag function we can proceed to the Take function as seen in this area of the screen:



The Bar|Scan fields in the list will be prompted for by the device. In the above example, the device will begin by asking for the Inventory Initials, the Current Room Tag, etc.

The function buttons on this screen are identical to those discuss in the previous section on Tag. Just repeat the process for Take.

Normally there will not be the need to collect the same number of fields. For example, the Catalog and Serial Number are usually not collected in the device during the Take mode.

A note about Company Code Prompt

If you are using a Single Company Database, you will not need this feature. If you are using two or more Company Databases, and are running two or more inventories concurrently, you may use this feature to designate which Company the inventory information is for by entering a Company ID here, up to seven digits. For more information on this feature, refer to *Chapter 17 in the Bar|Scan User Manual - Multiple Database*.

A note about Location Fields Type

The prompts for locations in the device will be different according to which type of location you choose. The type of location most widely used will be the Site location. You must keep your location field selection to the following choices: Current Region, Current Building, Current Floor, Current Room, and/or Current Room Tag.

The following is a list of the prompts that can be used if you choose the **Pallet** type of Location: Building, Row, Bay, Slot, and Level.

The following is a list of the prompts that can be used if you choose the **Vault** type of Location: Building, Vault, Row, Bay, and Level.

Note: Do not mix location types in your prompts. The Bar|Scan program was designed with the intent that the user would most likely be using a "Site" location type.

Region

Region is a two digit field that denotes a given area for the inventory site, i.e., the abbreviation for the state. This field can be filled in by selecting the response from a pop-up list that was downloaded from the PC during the last synchronization, capturing the information from a menu with the device, or by hand entering the information using the stylus and keyboard. Remember that if 2 digits is not enough for your needs, all fields can be stretched using the Key Fields tab in the Company Settings Screen or by using the UDF module.

Finally, any location field is optional. If you do not require the use of the Region field, then you do not need to add it to the prompts.

Building

This field allows you to enter a building description for this asset (a maximum of 5 characters), most often a name or the address number. This field can be filled in by selecting the response from a pop-up list that was downloaded from the PC during the last synchronization, capturing the information from a menu with the device, or by hand entering the information using the stylus and keyboard.

Floor

This prompt permits you to enter the floor number for this asset (a maximum of 5 characters). We suggest that floors one through nine be entered with a leading zero so that the information will sort correctly, i.e., floor is 01, or 02. This field can be filled in by selecting the response from a pop-up list that was downloaded from the PC during the last synchronization, capturing the information from a menu with the device, or by hand entering the information using the stylus and keyboard.

Organization Code

This prompt permits you to enter a code up to six characters or numbers in length to signify departmental information for an asset. This field can be filled in by selecting the response from a pop-up list that was downloaded from the PC during the last synchronization, capturing the information from a menu with the device, or by hand entering the information using the stylus and keyboard.

Room

This prompt permits you to enter up to six digits in length to specify a room or area for an asset. This field can be filled in by selecting the response from a pop-up list that was downloaded from the PC during the last synchronization, capturing the information from a menu with the device, or by hand entering the information using the stylus and keyboard.

Pallet and Vault Location Types

If you are using Pallet or Vault Locations, you will probably have your warehouse or storage space set up with Room Tags. You would only prompt for Room Tag and use the other location prompts only in the Pop-ups for reference purposes.

The following is a list of the prompts that will be different if you choose the **Pallet** type of Location: Building, Row, Bay, Slot, and Level. The following is a list of the prompts that will be different if you choose the **Vault** type of Location: Building, Vault, Row, Bay, and Level. The additional location prompts for Vault and Pallet types are: Vault, Row, Bay, Slot, Level.

Accessible (Y/N)

This field permits you to enter information in the device to indicate if a room could be entered for inventory purposes, or not. If the room was occupied or locked, for instance, a user could select "No" at the Accessible prompt.

After you select "No", you will proceed to the next location. The device will upload a record indicating that the space was not Accessible. This list can then be printed or synchronized back into the device for a subsequent inventory.

Usually you would never use this prompt in a warehouse inventory as locations are always Accessible.

Note: If you turn this prompt off, the system will automatically assume and mark all of the Transactions to be accessible.

Room Tag

This screen permits you to enter the bar code tag number for this room or area. You should be able to capture the Room Tag or select it from a pop-up, although it is possible to hand enter the information using the stylus and the keyboard.

Prior Locations and Inventories Using Quantities

The device allows you to document both a Prior Location, as well as a Current Location for your items. There are two sample configurations showing this feature. They are titled:

{SYSTEM} CONSUMABLES USING CATALOG
{SYSTEM} CONSUMABLES USING UPC

You do not need to use the Prior Location fields when doing a Tag or Take, **except** when doing a quantity "Z number" type of inventory.

You need to configure the device to prompt you for the following information in order to do a **TAG** inventory **using Quantities**:

- **A Current Location** for the assets. This can be as simple or as detailed as you like, but remember it has to be a valid location, entered into the Location table. Remember, this can be just a Room Tag.
- **A Catalog Category and Number** (XX9999)
- **A Quantity** of Assets (the number of items that are being inventoried)

For example, I need to inventory 7 connectors in my building at 123 Main Street, Anywhere, CA. I enter the Catalog information, as Catalog SY1001. The information entered into the device for this TAG with Quantities: Region = CA, Building = 123, Floor = 01, Room = 102, (or Room Tag), Catalog Category and Number = SY1001, Quantity = 7.

If I do a Take to move three of the above connectors to a new location, I would need to enter the location I am moving them from, the location I am moving them to, the Catalog Category and Number, and the Quantity of Assets. So, for a **Take using Quantities**, I would need to configure the device for the following prompts:

- **A Current Location** for the Assets (the location I want the items to move to). Remember, you can use just a Room Tag if desired.
- **A Prior Location** for the Assets (the location the items are moving from). Remember, you can use just a Room Tag.
- **A Catalog Category and Number** (XX9999)
- **A Quantity** of Assets (the number of assets that are moving)

Following our earlier example, and moving three of the connectors to room 102A, I would enter into the device: Region = CA, Building = 123, Floor = 01, Room = 102A, Prior Region = CA, Prior Building = 123, Prior Floor = 01, Prior Room = 102, Catalog Category and Number = SY1001, Quantity = 3.

Once all of the information is in the Asset table, my inventory would show that I had seven connectors in room 102, and that three of them moved to room 102A.

Notice a couple of differences when performing an inventory using quantities:

1. You **DO NOT** enter an Asset Number! This information is provided by the Bar|Scan software once the items have been uploaded. The Asset Number will appear as a number that begins with the letter Z. The first of its kind for a database that uses six digit Asset Numbers would be Z00001. By not entering an Asset Number, you are forcing Bar|Scan to keep the numbers straight for you, and you never have to worry about what Asset Number it uses, you only have to keep track of the locations the assets move from, locations the assets move to, the Catalog Number (XX9999), and the number of assets that move.

2. You enter a **Prior Location** as well as a **Current Location** for all **Takes**. When you deal with large quantities, and a few of the items move, it is a hassle to keep track of how many are left. By entering a Prior Location as well as a Current Location (along with the Catalog Number and Quantity that move) you make Bar|Scan subtract how many items have moved from the current number of items in that location. Therefore, if you have 1,243 items in room one, and move 15 of them to room two, you don't have to count or know how many are still in room one. Bar|Scan will subtract the number of items from its total, and display how many are still in room one, as well as how many now appear in room two.

The list of location items that you can select for Prior Location information is the same as you can select for Current Locations. Therefore, we are not limiting you, or specifying which items you need to select. Use the Prior Location items that are specific for your inventory needs, i.e., if you use Site Locations, you need only select Prior Region, Prior Building, Prior Floor, Prior Room, and possibly Prior Room Tag. If you use a Vault Type of Location, obviously your prompts would be different to reflect the Vault specifics. If you use more than one Location Type, you may leave them all on, and select Prior Location Type to specify which location fields that you want to use.

Your choices for Prior Location fields are: Prior Location Type, Prior Region, Prior Building, Prior Floor, Prior Room, Prior Vault, Prior Row, Prior Bay, Prior Slot, Prior Level, Prior Room Tag.

3. You must enter a Catalog Number even during the Take mode.

Catalog

This field is required for a Tag, but normally not used on a Take. This field must be "exactly" 6 characters (2 alpha and 4 numeric).

Under exceptional circumstances such as validating existing Catalogs, you may wish to turn Catalog on for a Take. Also, the field width and formatting of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Asset #

This prompt allows you to enter the asset number (a maximum of 80 characters). The asset number can be entered by capturing the appropriate bar code with the scanner or camera, or it can be manually entered using the stylus or the keyboard.

During a Take, you can capture an existing asset number and have Bar|Scan show you selected information about the Asset such as it's Catalog information, last assigned, owner name, last inventory date, last inventory location, etc. This is what we refer to as an Audit Scan. The set up for the Audit Scan is discussed later in this Chapter in Custom Pop-Ups.

Normally, you will want to capture actual bar code labels for the asset number. However, you can substitute serial numbers for asset numbers if you are doing an IT exclusive database. Keep in mind that in normal office environments, the serial number is often difficult to reach. This is not a problem in a warehouse or distribution environment.

Note: you can configure your device to capture either the serial # or the asset # and have either of these populate the other asset fields in your configuration. In other words, either number can be the primary field for your assets.

Quantity of Assets

When you configure the device to use the Quantity prompt, it will replace the Asset Number prompt. This type of inventory is most useful for consumable inventories where asset tags are not applied.

Please see Quantity Inventories for more information on how to use this feature.

Serial #

This field permits you to enter a Serial Number for this asset, (a maximum of 25 characters). The Serial Number can be entered by entering numbers and letters on the keyboard with the stylus, or by capturing an appropriate bar code with the camera or scanner. Normally, you would not have this information in a pop-up.

Note: you can configure your device to capture either the serial # or the asset # and have either of these populate the other asset fields in your configuration. In other words, either number can be the primary field for your assets.

The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Status

This field has two-digit codes that are downloaded from the PC portion of Bar|Scan into the program and are available on a pop-up list. To access the pop-up list simply click on the right-hand side of the screen, next to the word Status. You will be shown all of the choices that have been synchronized, and you can simply select your choice from that list by tapping on it with the stylus.

You can change the two-digit codes to three or four-digit codes. Actually you can go up to a twenty-five digit code by accessing your Company Settings screen on your PC.

Condition

This field has two-digit codes that are downloaded from the PC portion of Bar|Scan into the program and are available on a pop-up list. To access the pop-up list simply click on the right-hand side of the screen, next to the word Condition. You will be shown all of the choices that have been synchronized, and you can simply select your choice from that list by tapping on it with the stylus.

You can change the two-digit codes to three or four-digit codes. Actually you can go up to a twenty-five digit code by accessing your Company Settings screen on your PC.

Purchase Order #

This field will permit you to enter a Purchase Order number into it via the keyboard and the stylus. Normally, you will want to configure this field to retain the information until you change it, or until you change locations. This is done in the Field Properties Box and selecting "Keep value from prior asset entered" as previously discussed.

Normally, you would not have this information in a pop-up.

The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Name

This field will permit you to enter a Current Owner or User Name into it via the keyboard and the stylus or from a pop-up. The name is also stored as part of the information stored in the Asset's Location History.

Normally, you will want to configure this field to retain the information until you change it, or until you change locations. This is done in the Field Properties Box and selecting "Keep value from prior asset entered" as previously discussed.

The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

The name is often used in conjunction with a signature (not available for Android).

Telephone Number

This field will permit you to enter a Telephone number via the keyboard and the stylus or pop-up.

Normally, you will want to configure this field to retain the information until you change it, or until you change locations. This is done in the Field Properties Box and selecting "Keep value from prior asset entered" as previously discussed.

The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Inventory Comments

This prompt allows you to enter a comment for this asset (a maximum of 12 characters). The inventory comments are also stored as part of the information stored in the Asset's Location History.

Normally, you will want to configure this field to retain the information until you change it, or until you change locations. This is done in the Field Properties Box and selecting "Keep value from prior asset entered" as previously discussed.

The field width of the field can be changed by using the User Defined Fields (UDF) Module on the PC.

Other fields

We have just covered the most commonly used fields for collecting asset inventory information. You can use many additional fields, either User Defined Fields that you create or other fields that already exist.

As the User Definable name implies, you decide what that field should be called and what type of field it is.

For instance, if you would want to collect a Maintenance Code, you could use a User Definable Field to collect this information. You first create the UDF in the Transaction Table and when completed, add it to the Tag and Take lists.

Custom Pop-Ups

As described elsewhere in this manual it is you, the user, who decides what prompts appear in the device screen, both for TAGS and TAKES. Data is entered into each of them in one of three ways:

- ✓ capture a bar code label with the camera or scanner.
- ✓ 'type' the information using the soft keyboard (see "Using the Keyboard Button"), or
- ✓ select a value from a pop-up or dialog.

Pop-ups are lists of values synchronized down from the PC, giving the user the ability to select from a pre-configured list. This helps avoid typographic errors and provides consistency in data.

Default Pop-ups

When creating the list of TAG and TAKE prompts that is to be loaded into the device, Bar|Scan automatically creates pop-ups for the following fields:

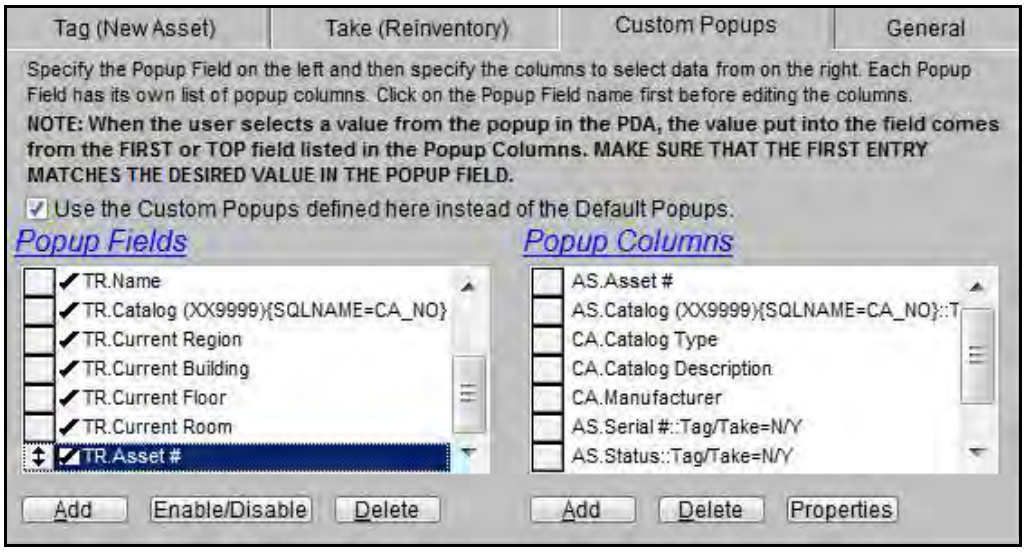
✓ Catalog
✓ Room Tag (Current, Prior)
✓ Condition
✓ Status
✓ Organization Code
✓ Owner Name

In other words, if you include any of these fields in your TAG or TAKE lists, they will automatically have pop-ups set for them...the user will be able to tap on the data field, see a list of allowed values, then select one.

You many feel that the default pop-ups do not meet your requirements, e.g., you may need a pop-up for a User Defined Field (UDF) or you do not want to force the user to a limited set of values for one of the default prompts or the list of columns in one of the pop-ups may be different than what is desired. Whatever the reason, you have the option of turning off all default pop-ups and creating your own set of custom pop-ups. Please note that it is one or the other. If you choose custom pop-ups then all of the default pop-ups are turned off and you must create ALL of the pop-ups that you want, even those that formerly appeared for the default fields.

Setting up your Custom Pop-ups

The following instructions for setting up your custom pop-ups require that you be at the 'Custom Pop-up' section of the Device Communications Parameters screen. To do this, enter the following menu options on your PC.



The Custom Pop-ups screen consists of two lists and a check mark: the Pop-up Fields (on the left), the Pop-up Columns (on the right) and the 'Use the Custom Pop-ups' checkmark above the left list.

Pop-up Fields

The Pop-up Fields on the left are the list of fields for which you want pop-up responses. For example, if you enter an 'Organization Code' into the Pop-up Fields then any 'Organization Code' appearing in the TAG list will have a pop-up. It is the same for the TAKE list. Any 'Organization Code' appearing in the TAKE list will have a pop-up.

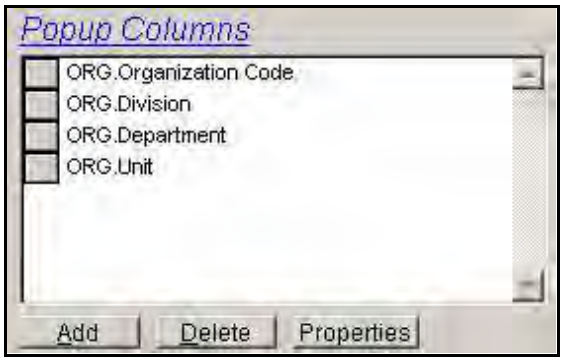
What if 'Organization Code' appears in only one of the TAG or TAKE lists? What if it doesn't appear at all? That's ok! Any Pop-up field not used is simply ignored. This allows you to configure pop-ups for many fields just once, then use them for a variety of different TAG and TAKE prompt lists.

In addition to this, each pop-up field has an 'enabled' check mark next to it. By default, any prompt added to the 'Pop-up Field' list is enabled when first added. However, it can be disabled by highlighting the prompt then clicking on the 'Enable/Disable' button. If a field is disabled, it is as if the Pop-up Field doesn't exist at all. For example, if the 'Organization Code' mentioned above is disabled, even though 'Organization Code' may appear in the TAG list or the TAKE list the user will not have a pop-up value available. They must manually enter a value using the keyboard or use the camera or scanner.

Use the ADD and DELETE buttons below the list to add and remove entries in the Pop-up Field list.

Pop-up Columns

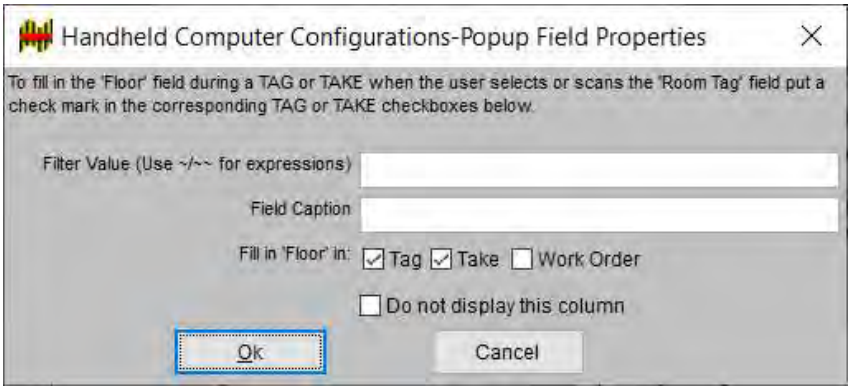
The 'Pop-up Columns' list is found on the right side of the screen. It defines the columns of data that will appear in the device for each pop-up. If you click on one of the Pop-up Fields on the left, you will see the list of Pop-up Columns on the right change accordingly. If you have not yet defined any columns for a given Pop-up Field, the pop-up columns list on the right will be empty. Note that until you select or click on one of the Pop-up Fields, the Pop-up Columns list will be empty.



The first field in the Pop-up Columns list corresponds to the first column on the device, the next to the second column, etc. It is important to remember that the value in the first field is what will be used to 'fill in' the value in the TAG or TAKE prompt list. Any additional columns are for the benefit of the user in selecting the value in the first field.

Use the ADD and Delete buttons below the list to add and remove entries in the Pop-up Columns list.

Additionally, the Pop-up Columns have a limited set of properties that may be adjusted. These may change depending upon the Pop-up Column itself. You may access the properties of a Pop-up Column by clicking on the entry then clicking on the Properties button. You will get a dialog that has the editable properties.



Filter Value Specify a value that the column must equal. If filled in, the list of values available to the pop-up must also satisfy the value in the filter. This filter is not as sophisticated as the filter found in Reports or Sets.

What you enter in the filter box will depend on the kind of filter you need.

- If you need a simple filter where the pop-up column should equal a single value. In this case, simply enter the value in the field. Bar|can automatically uses the pop-up field as the left side of the filter expression. For example, if the Pop-up Column is Catalog Code and you want only those catalogs that have Catalog Code 'AV', then enter only 'AV' (without quotes) into the filter box. Internally Bar|Scan create the expression 'Catalog Code="AV"'. It puts the quotes around the value for you if it needs them.

- If you need to use a comparison operator other than the default 'equal' sign. In this case you need to enter a single tilde character (~) followed by the operator and then an expression. An expression means that it has to be between quotes if it is a string. If it is a number enter the number without

quotes. For example, if your pop-up column is Catalog Type and you want all catalogs except those that are of Catalog Type ‘MONITOR’, you would enter the following in the filter box.

~<>”MONITOR”

The tilde tells Bar|Scan this is an expression with an operator. The operator “<>” is a ‘Not Equal’ operator. It tells Bar|Scan how to compare it to the pop-up field. The value tells it, in this case, what not to equal. Note that the value has to be between quote marks since it is a character value.

- If you need to filter on a value but the field you want to filter on is not in the list of pop-up fields. In this case you must use the double tilde operator (~~) followed by the entire expression from beginning to end. For example, you must use this if your Catalog Number pop-up lists only fields Catalog Code, Catalog Number, Catalog Type and Catalog Description but you only want those catalogs that come from a particular manufacturer. The manufacturer is not one of the fields listed, yet you still want to filter on it. To do this you will need to do the following.

  Display the properties box in one of the pop-up fields (in this case it doesn’t matter which one). Enter the following:

  ~~CA.MV_NAME=”HP”

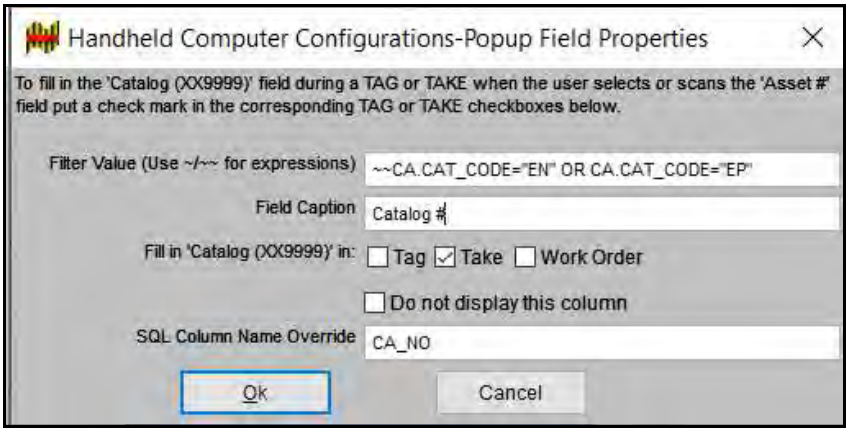
  The double tilde at the beginning of this expression tells Bar|Scan that this is a FULL EXPRESSION and to ignore the pop-up field. The expression stands entirely on its own. The ‘CA.MV_NAME’ is the name of the field you want to filter on. In this case it is the Catalog Manufacturer field. Please consult the field lists in the manual to get the actual database fields names, or you can go to the field itself on the screen, right click on it and select ‘Field Information’. You will see the database field name there. The comparison operator in this case is the ‘=’ sign. The value it must match is manufacturer ‘HP’. Again, note that since the value is a character string it must be between quote marks.

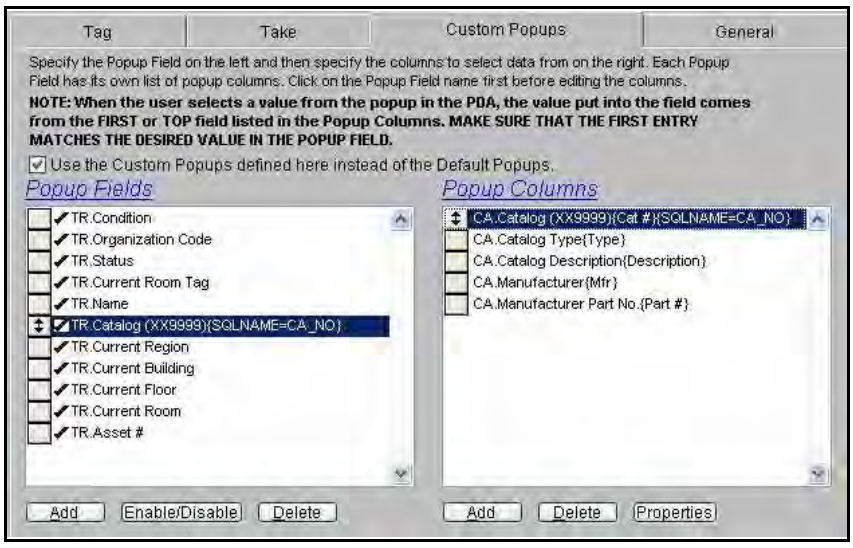
- If you need to filter on a more than one value such as two Catalog Categories so that you can download Catalogs from more than one Category, you can specify a connector such as OR , AND such as in the following example.

OR logic sample: ~~CA.CAT_CODE="EN" OR CA.CAT_CODE="EP"

AND logic sample: ~~CA.CAT_CODE<>"EN" AND CA.CAT_CODE<>"EP"

The image below describes the OR sample.





Field Caption Specify the column header text that appears at the top of each column in the pop-up.

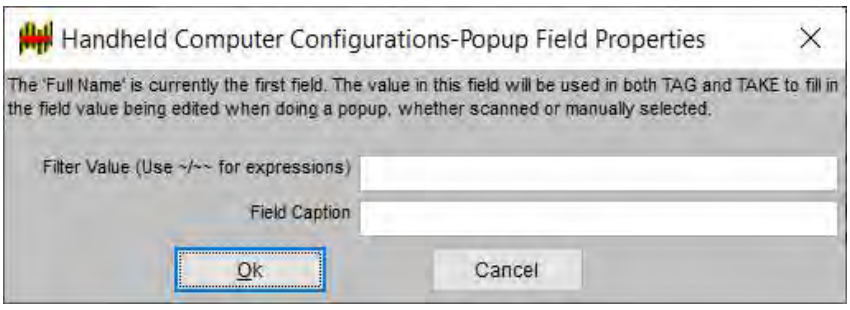
There is very little room on some device screen, such as a phone, so making the columns as narrow as possible yet still legible is important. You can contribute to this by abbreviating the column headers. For example, if the column is 'Organization Code', then the column header will normally be 'Organization Code', the exact same words. But you can narrow this by giving it a new column header, such as 'OrgCode'. To do this you would click on the 'Organization Code' column, then click on the 'Properties' button. The Properties dialog will appear. Enter the value 'OrgCode' (without the quotes) into the Header field. Then click on the OK button. Now the 'Organization Code' columns will have 'OrgCode' as its header.

Fill In Specify information for Bar|Scan to fill in (or display) when you perform a capture. This is what we refer to as the **Audit Scan.**

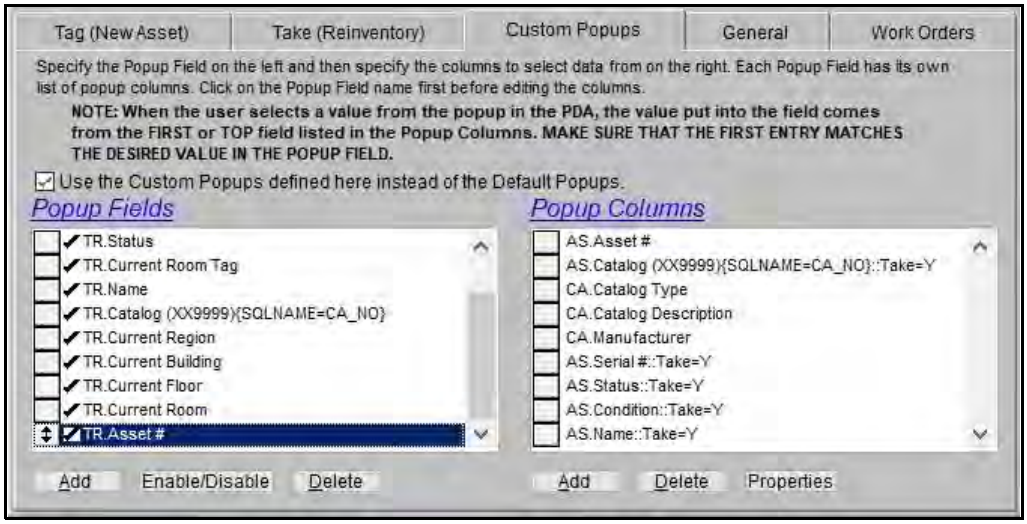
For example, it would be beneficial to capture an existing asset number during your annual inventory (Take Mode) and have the serial number, Catalog Description, last known Status, Condition and User Name Displayed.

Would it also be beneficial to have this information populate existing fields so that they only need to be edit if something has changed? For example, capturing an Asset label will display the last known User Name. It will then complete the new prompt for User Name. You will only need to change the User Name if the asset has been assigned to a new user.

Below is an example of the User Name Fill In section.



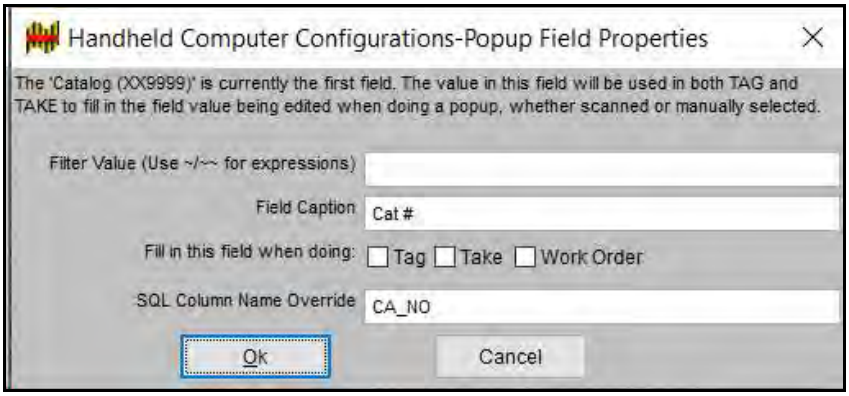
Below is an example of a number of fields that will be displayed when an Asset label is captured. Notice that some may have a 'Tag/Tag=Y/Y' after the Pop-up column and some do not. The ones displaying the "Y" will fill in the corresponding prompts on either TAG, TAKE, or both.



The list of fields in TAG and TAKE can be filled in automatically by picking one of the available values in a pop-up. A TAG or TAKE field is specified to have a pop-up by putting the same field name in the list of 'Pop-up Fields' within the 'Custom Pop-ups' tab. The pop-up itself has one or more columns. The first column will always be used to fill in the TAG or TAKE field that the pop-up is designed for. The pop-up can have more than one Pop-up Column. You can specify these extra columns to be either for display only or to be able to 'Fill In' other fields in the TAG or TAKE field list.

If specified as ‘Fill In’ fields, the value from the pop-up item selected will automatically scan the list of TAG or TAKE fields and look for the same field. If found, it will automatically fill it in. The only exception to this is if the TAG or TAKE field is ABOVE THE CURRENT FIELD. In that case, you will get a prompt asking if it is ok to fill in the data. For example, if the pop-up has the fields “Building, Floor” and the current TAG field is Floor, you will get a prompt as follows: “Current Building is above the current prompt. Really overwrite its data?”

Occasionally you will see the “SQL Column Name Override” prompt. This is for advanced users. Do not touch this unless you have consulted directly with Bar|Scan Technical Support. This will not show up on all fields.



Turning Custom Pop-ups On and Off

To use custom pop-ups, put a check mark in the field "Use the Custom Pop-ups defined here instead of the Default Pop-ups”. If this is unchecked the Default Pop-ups will be used, even though there are Custom Pop-ups defined.

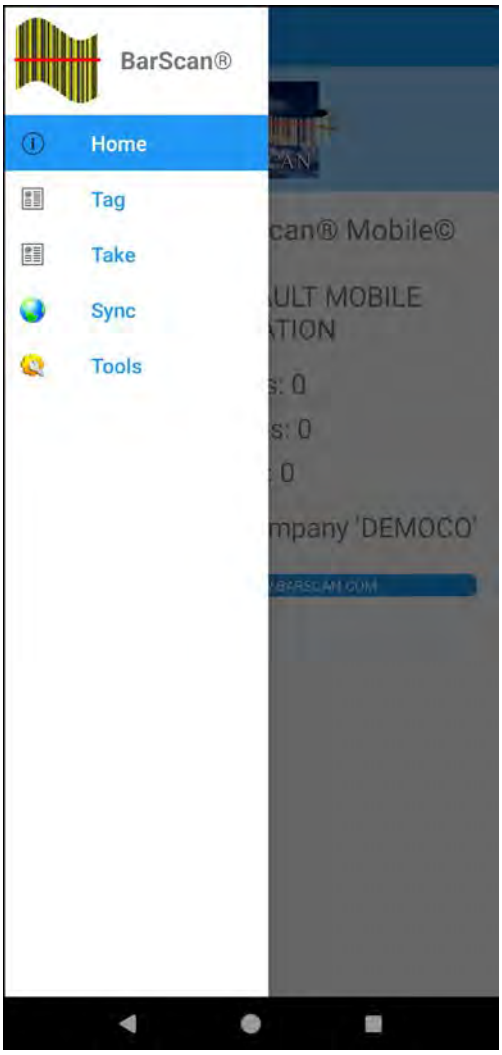
THE BAR|SCAN MOBILE MAIN MENU

Turn the device, smart phone or tablet on by pressing the power control button. If your device has a stylus, retrieve it from the unit. Tap the Bar|Scan App Icon with the stylus or you finger.

Be patient, the app will take a few seconds to launch.

You will be shown the Bar|Scan Welcome Screen which will appear similar to the one shown below.

Tap the Menu button. This is the icon that consists of three parallel horizontal lines (displayed as ≡). You will now see the Bar|Scan Flyout Menu as shown below:



You will see five items the menu screen:

✓ HOME - This button takes you back to the Home Screen.

✓ TAG inventory - Tagging is the activity that initially identifies the asset by applying a bar code label and recording information about the asset.

✓ TAKE inventory - Periodically, after the initial Tagging, you will Take an inventory of the assets to update their location, condition, etc.

✓ SYNCH - Use this button to communicate and share information with the Bar|Scan desktop application including your inventory data.

✓ TOOLS - This button displays three additional screens (4th optional screen) described in the next few paragraphs.

If you have selected "Advanced Functions" in your Tools -▸ Settings Panel then you will see the following:

✓ INVENTORY LIST - This allows you to review information that you have already collected in TAG and TAKE mode. You can search or filter to make finding items easier. You can also delete items. This is discussed in more detail later in this chapter.

SETTINGS

Synchronization

You can specify the synchronization settings that you wish to use for Bar|Scan. Once setup, unless you are instructed to do so, do not modify the Synchronization settings.

✓ IP Address - This item allows you to enter the IP address that allows communication between your smart phone or tablet and the desktop Bar|Scan. For most users, you would enter the same IP address that you see on your desktop's Bar|Scan Synchronize Handheld Screen.

✓ Port No. - This item allows you to enter the TCP Port address that allows communication between your smart phone or tablet and the desktop Bar|Scan. For most users, you would enter the same Port address that you see on your desktop's Bar|Scan Synchronize Handheld Screen.

✓ Default Sync Selection - This allows you to change what information is taken from your Bar|Scan company database and copied to the device. Two choices become important when:

1: Lookup tables are large. You can select the 'Inventory Only' to do a quick Synchronization.

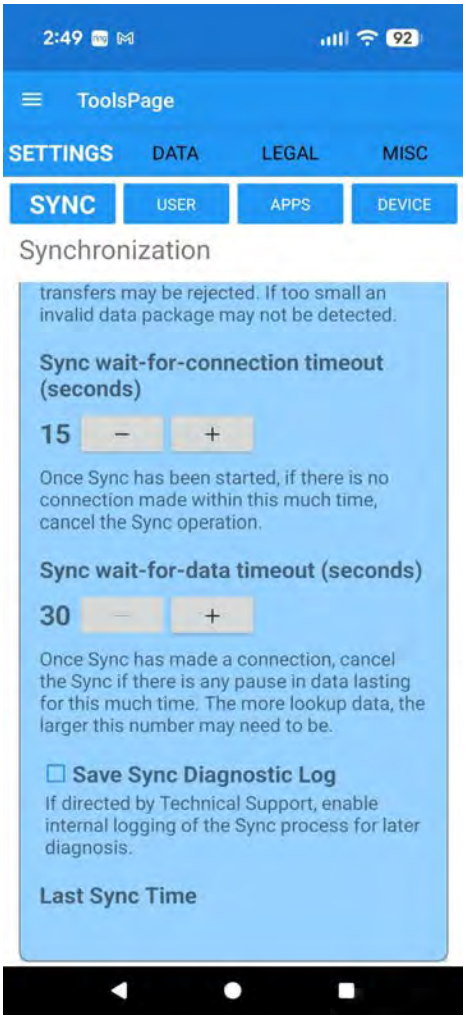
2: There are problems with the look ups and they need to be reloaded, especially for debugging in the field. "Inventory, Prompts, Lookups' or 'Inventory Only' can be selected if you just want to skip the problem and continue doing the inventory.

These choices allow a user to make a choice based on immediate circumstance.

Inventory, Prompts, Lookups - this is the default.

Inventory Data Only - Only the inventory data is sent, the lookups are not downloaded. This is a much faster synchronization. Lookup files are massive compared to the inventory file. Megabytes vs kilobytes. Syncing Lookup tables can take a long time. This allows for a faster work flow since most of the time lookups do not change much.

The next settings require the 'Advanced Functions' setting in the BarScan Mobile Application to be enabled before they become visible. There are four items to check:



✓ Minimum Sync Package size. Change this only as directed by support. The default is 960kB. Sync transfers several data packages. Some require a minimum size setting to detect problems. If this value is too large, valid data transfers may be rejected. If too small then an invalid data package may not be detected.

✓ Synch wait-for-connection timeout (the default is 15 seconds). This defines how long the handheld device will wait for the BarScan server to respond to its request for a connection. The request starts once the user taps on the Sync button. If the handheld does not get a response within the set amount of time, it will timeout and cancel the connection request and the user will get a timeout message.

✓ Synch wait-for-data timeout (the default is 30 seconds). This comes into play once the connection has been established. If there is a pause in data transfer for any reason that is longer than the set amount of time the handheld will timeout, close the connection and issue a timeout message.

We recommend that if you believe that this is a timeout issue, that you change both settings to 100 seconds. If the synchronization fails, then you know that it is not a timeout issue but one of the other issues mentioned above. If you can then successfully synchronize, reduce each until the synch fails. Then increase by 10 seconds as a buffer. Do not keep the settings at 100 seconds as this will slow down all of your synchronizations.

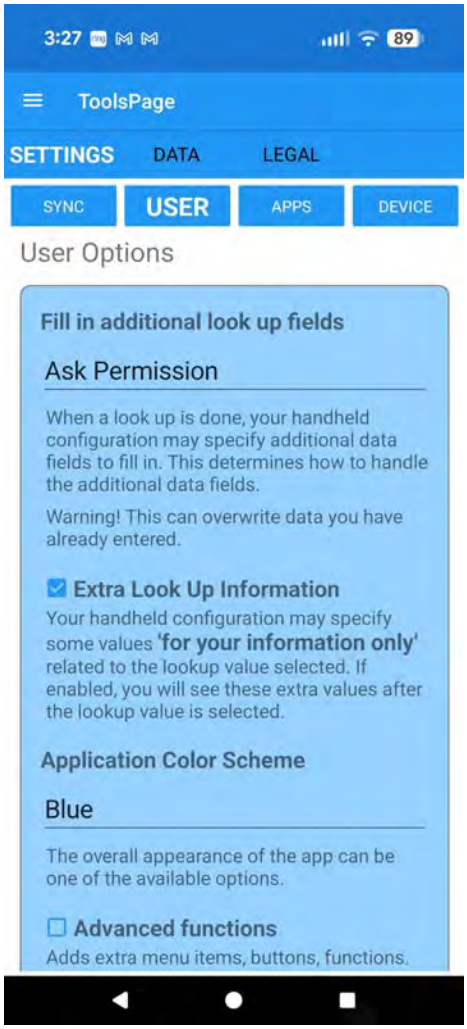
✓ Save Sync Diagnostic Log - The Diagnostic Log is available to help determine the source of any synchronization problem. The user puts a check mark next to the 'Save Sync Diagnostic Log' setting and the handheld will start recording a log of internal activities related to the Sync operation. If there are problems, it is designed to attempt to record enough information to assist in diagnosing the problem. Once the problem during the Sync has been logged, the user can go to the Tools/Data tab and select the 'Share Diagnostic Data' button and sharing the log with BarScan technical support. Note that this log is cleared after every successful sync with lookups.

✓ Last Sync Time - This displays the last date and time that a synchronization took place.

Note on Remote and Cloud Systems: Bar|Scan can communicate through a Remote Desktop Application, Cloud computing or Virtual Private Network (VPN) with the device. Consult the Knowledge Base Page of the Bar|Scan website at: www.barscan.com for the latest information and setup instructions for these options.

User Options

You can specify the (Global) User Options that you wish to use for Bar|Scan.



✓ Fill in additional lookup fields - There are three choices available. With 'Ask Permission' Bar|Scan will stop and ask you to confirm the 'Fill In' prompts affected by your barcode capture or data entry. This is what we call an Audit Scan. You have a option to not fill in or fill in without asking.

✓ Extra Lookup Information - Extra columns are displayed when this is selected.

✓ Application color scheme - There are multiple schemes to choose from to meet your personal preference.

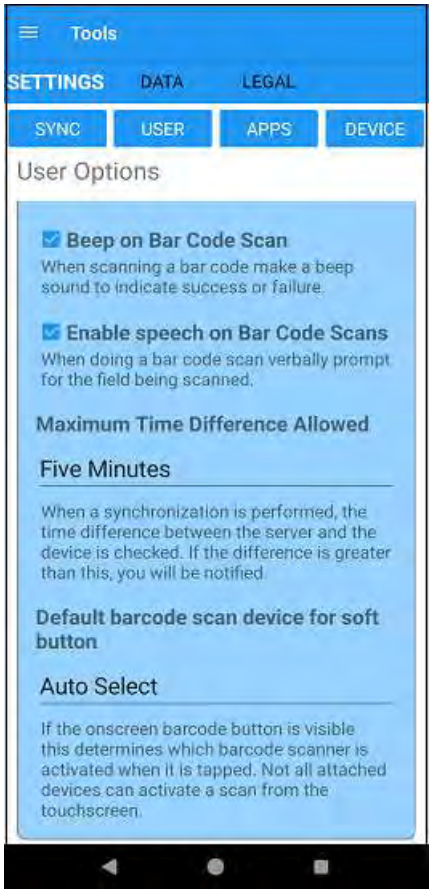
✓ Advanced functions - This adds extra menus, buttons, and functions. This should not be necessary for most Bar|Scan users.

✓ Continuous Bar Code Scanning - Turn on only in certain situations when the Mobile Configuration is designed for this type of inventory. For example, after entering the location, capture asset bar code labels one after another.

✓ Flashlight on during Bar Code Scanning - Can be used to improve the Camera's ability to capture bar codes in low light conditions. Not applicable for laser scanners.

✓ Beep on Bar Code Scan - Turn on to help you verify that your capture was successful. The volume is controlled by your device.

✓ Enable speech on Bar Code Scans - If the device has verbal capability, this enables verbal prompts for the field being scanned.



✓ Maximum Time Difference Allowed - When a synchronization is performed, the time difference between the server and the device is checked. If the difference is greater than this, you will be notified.

✓ Default barcode scan device for soft button - There are three choices available:

Auto Select
Camera
Laser or Imager

If your device has a Camera and Laser device, and BarScan is selecting the wrong device than you can force BarScan to usee the correct device for capturing the barcode.

✓ Specify how to handle column filters. As mentioned before, this is only available if 'Advanced Functions" is checked on. When doing a lookup, one of the options available is to filter the displayed values based on the values entered in the Auto Filter Row This controls how the filter interprets those values.

Starts With - Values in a column should start with the value in the Auto Filter Row. This is the default setting.

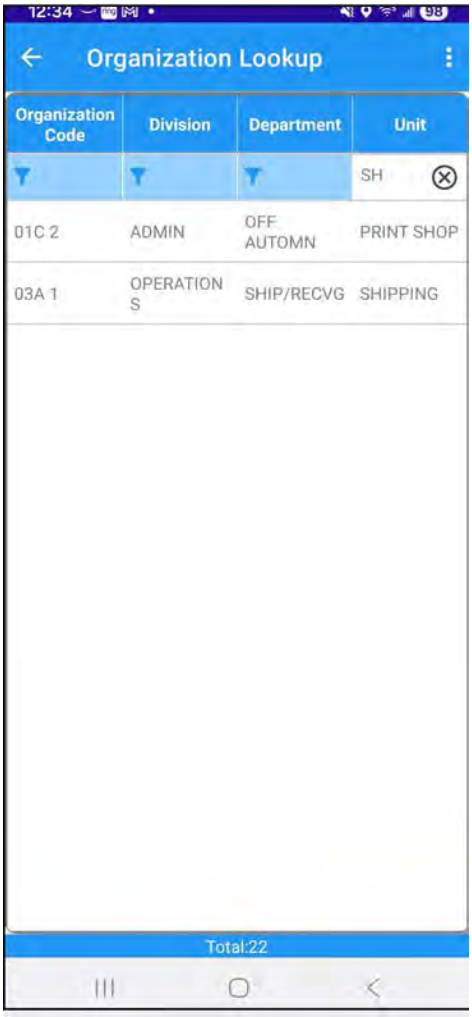
Exactly Equals - Values in a column should equal the value in the Auto Filter Row.

Contains - Values in a column should contain the value in the Auto Filter Row.

Depends On Type Of Data -Each of the actions does exactly what it says, except 'Depends of Data Type' (Default) requires explanation. For text and number fields, the record displays if the record value starts with the filter value. E.g., if the filter is '1' then records with '1','12','134' can display. For date fields, tapping the filter brings up a calendar to pick a date from.

Here is an example of how filtering works.

Filtering works by the user typing a value into a filter row that is created when Filtering starts. You can recognize it by the small filter icon at the top of each column when filtering is active. Filter values apply only to the column the value is typed into. Entering values into more than one column is ok and the record must satisfy all column filters.



✓ Debounce Time helps prevent accidental keypresses on physical keyboards. If you are getting multiple characters with single keypress, increase this number. A value of 0 turns this off.

Application Options

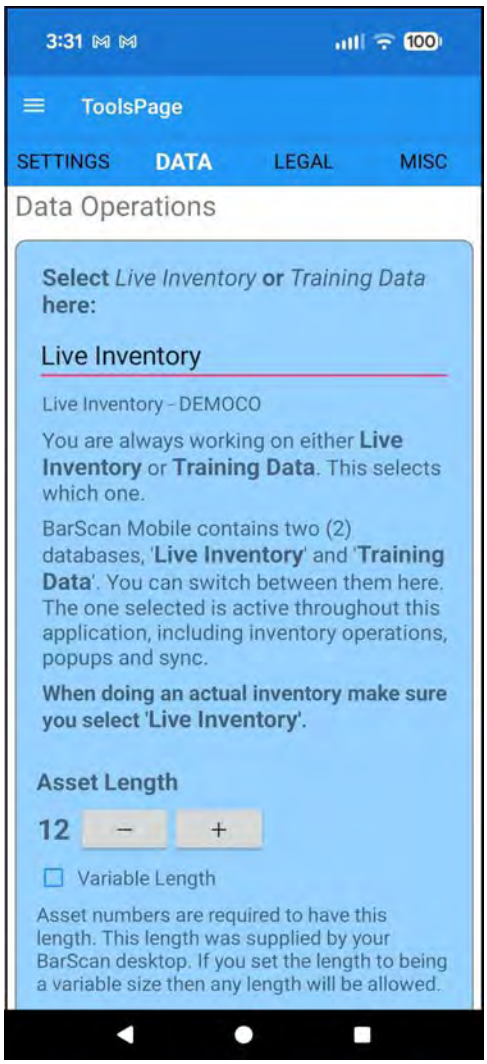
All of the information in these sections is for identification and troubleshooting and is mostly collected by Bar|Scan from your device.

✓ Applications - This section displays the version information for both Bar|Scan Mobile and the Bar|Scan Desktop Application (once you complete your first synchronization).

✓ Device - This section displays more information about your device, smart phone or tablet.

DATA

When you tap on the word DATA or swipe a screen left or right to the DATA screen, you will be shown a dialog box that will display your Data options, similar to the one at the right.



You are presented with several options.

✓ SELECT "Live Inventory" or "Training Data" - Use this to toggle between using Live Inventory Data and Sample Training Data by clicking on the area.

There is a label length setting on the device which only available if you check 'Advanced Functions' on the Tools -▸ Settings Screen. The setting is located on the Tools -▸ Data Screen. As shown at the right you will see additional options such as the ability to change the asset number length. These options are available for unexpected situations that may arise in the field.

Keep in mind that your Asset and Room tag lengths are configured on the PC portion of Bar|Scan and this option is for unexpected situations only.

✓ DELETE INVENTORY ONLY - This button deletes all of the inventory items that have been collected. Please Select SYNC and send your inventory to the Bar|Scan desktop company database before you clear (unless you were doing test items).

✓ SHARE INVENTORY ONLY - This button allows you to email or message your raw inventory date. This is useful when your Bar|Scan PC is not ready to synchronize or you need to share when requested by technical support.

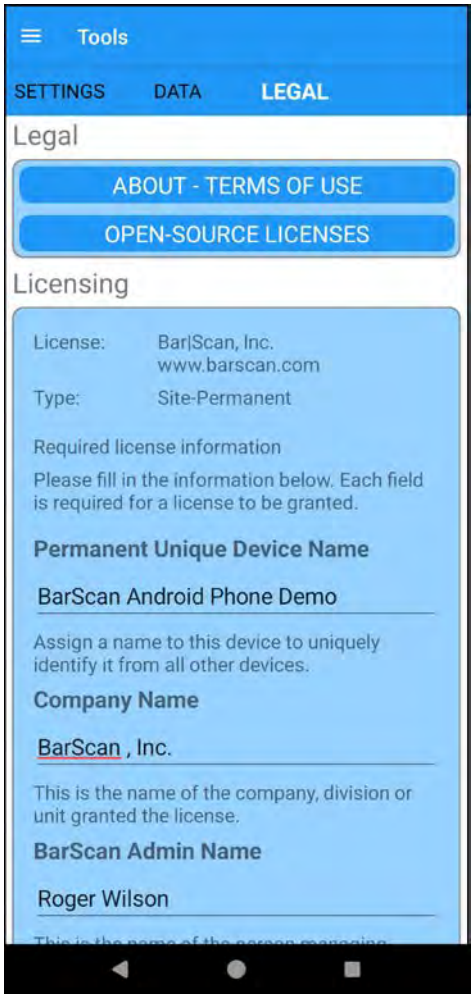
✓ SAVE INVENTORY FILE TO DOWNLOADS - This allows you to save the inventory data directly to the device so that you can retrieve the file manually. This can be useful in situations where you have no Wi-Fi or email capability and you need to import the data before continuing your inventory.

✓ RE-GENERATE TRAINING DATA - This loads fresh sample data matching the Democo Database. Refer to the Bar|Scan User Manual Chapter 19 - "Training With Demo Database" for more information on how to use this sample data.

This button DOES NOT affect or delete all of the inventory items (Live Data) that has been collected.

LEGAL

The Legal Information Screen is shown below.



Use the LEGAL screen to review the Bar|Scan License Terms as well as other License terms for this application.

✓ Permanent Unique Device Name - This button allows you to enter the Device Name for your smart phone or tablet so that this license can be uniquely distinguished. If the Licensing Section shows 'REQUEST BARSCAN LICENSE' then see the prior section 'Licensing the Bar|Scan Mobile'.

✓ Company Name - This is the entity granted the Bar|Scan license.

✓ Bar|Scan Administrator Name, Email, Phone - These items are the contact information for the Bar|Scan license.

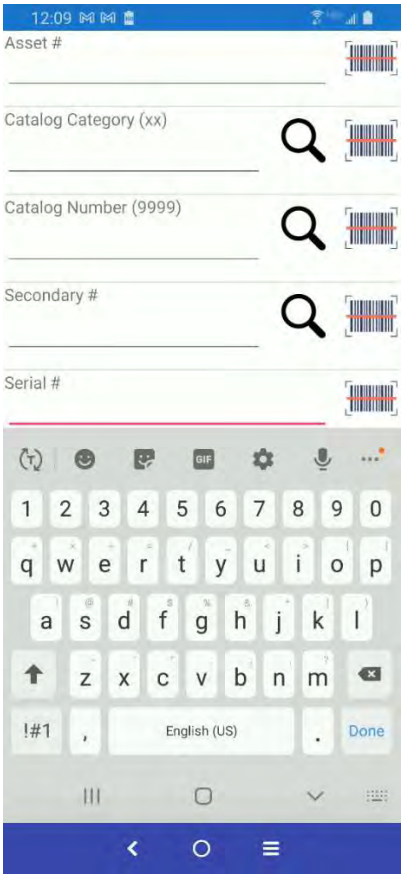
The licensing request section is documented earlier in this chapter.

MISC

If you check 'Advanced Functions' on the Settings Screen, you will see a Miscellaneous Screen appear. The information on this screen is only for technical support.

Using the On-screen Keyboard

The on-screen keyboard is available for you to enter responses to the prompts. When you tap on any prompt, your QWERTY keyboard should appear as illustrated below.



If you need to enter letters or any of the symbols shown on this keyboard, tap on the corresponding character with your finger or the stylus that came with your device.

When you are finished entering the characters, click on the Done key or minimize the keyboard.

TAG and TAKE Menu Options

When you have selected TAG or TAKE, you can select additional menu option by tapping on the Menu button at the top right. This is the icon that consists of three parallel horizontal dots (displayed as ⋮).

The options will appear as shown below.

The list will vary depending on what action you are performing.

Set continuous bar code scanning - Turn on only in certain situations when the Mobile Configuration is designed for this type of inventory. For example, after entering the location, capture asset bar code labels one after another.

Clear all values - Blanks all prompts.

Reset to default values - There are two choices for a default value as the response to a prompt. You can enter a default value on this screen which will be used in the device or you can keep the value from the prior asset entered.

Validate data - This will perform a validation prior to your selecting SAVE. This can be useful when you have a Configuration with many prompts or complex validation rules.

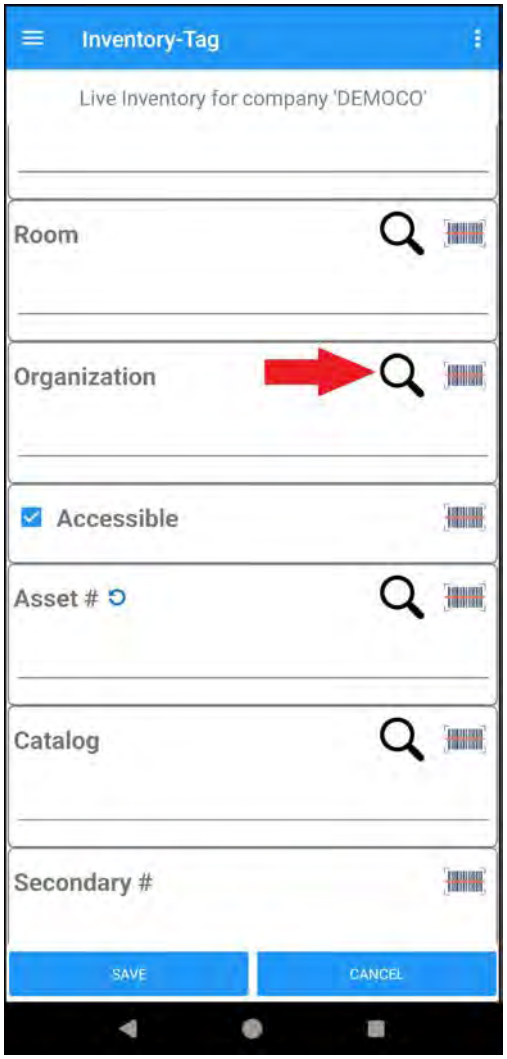
Scroll to current selection - This quickly move the cursor to the current field (field name).

Pop-up choices for Downloaded Bar|Scan Fields

As discussed in the Configure Section of this Chapter, a number of fields can be downloaded into the device. Because of the large amount of memory in the device, thousands of lists and items can be downloaded.

On any prompt that includes the download, you can select three methods for data entry. The first is the keyboard, the second is the pop-up, and the third is the scanner or camera.

The Pop-up can be selected by tapping on the magnifying glass as shown below:



When you tap in the response area, your Pop-up selection will appear similar to the following:

When you tap on any of the choices, the item will be entered as the selection.

Leaving a prompt blank is sometimes desired. There are two things that need to be considered for a blank response.

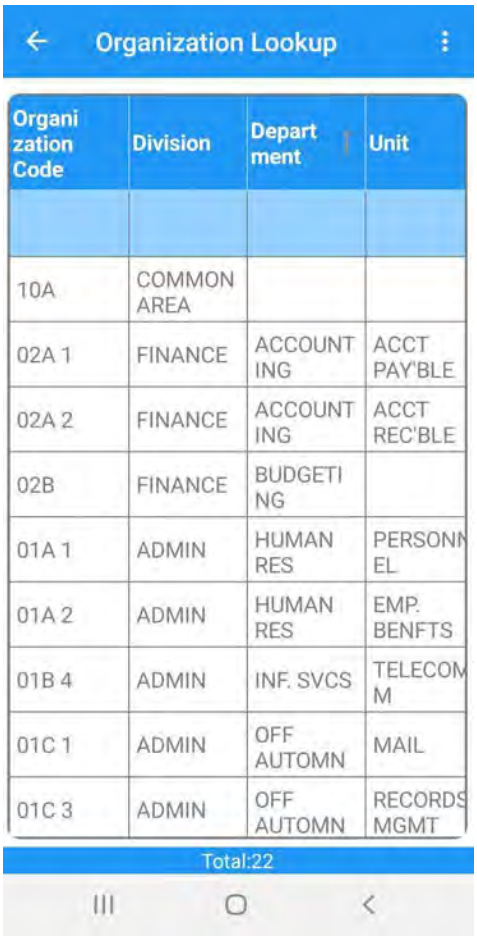
- The Configuration that is downloaded must allow a blank. Remember that when a prompt is added to the Configuration, you have the option of making a response mandatory.

- The corresponding table in Bar|Scan must include a blank. For example, if you wish to choose a blank Condition or Status code, you must first create a blank code on the PC portion of Bar|Scan.

Changing the Order of the Pop-Ups

Any pop-up which displays more than one column can be sorted in order of any column to assist you in locating the correct response.

For example, clicking on the Department column title will then resort the list according to Department as in the example below:

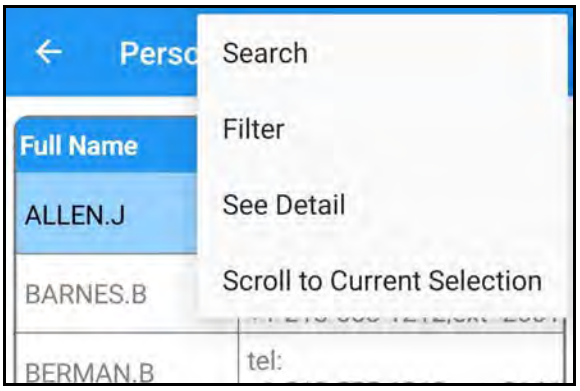


If you have many columns, you can swipe left or right to see columns that are not on your screen.

Double tap the item to select it.

You can also Search or Filter widen or narrow the columns by clicking on the three parallel dots (displayed as ⋮) at the top-right portion of the screen.

You will now see the Bar|Scan Flyout Menu as shown below:



✓ *Search* - when you select this option, a Find dialog box will appear. After you type in your search, Bar|Scan will search all fields in the pop-up. If found, it will then be highlighted for you. To close and exit the search, select the search option again.

✓ *Filter* - when you select this option, a blank row will appear at the top of the pop-up list. Enter your filter criteria in any one of the Pop-up fields. Bar|Scan will filter all items in the pop-up. If nothing matches your filter criteria, nothing will be displayed. To close and exit the filter, select the filter option again.

✓ *See Detail* - when you select this option, you are presented with all of the fields download into the device for this prompt in a vertical fashion. For example, in the case of the Personnel Table, you will see the email, assigned location, First Name, Middle Name, Last Name, etc.

✓ *Scroll to Current Selection* - when you select this option, the device will scroll to the selection. This can be useful if you made a selection but continued to browse up or down the pop-up list.

Text and Display Settings

Fonts, display size, brightness and other settings are not controlled by Bar|Scan Mobile. Open and use your device's settings app to adjust these items.

Error Handling

Bar|Scan will validate your data prior to saving or when requested, according to the rules that you assigned when you created the device configuration in the desktop portion of Bar|Scan.

Error or warning messages will appear in RED as shown in the example above. Once you make the necessary corrections, your data can be saved.

TAG

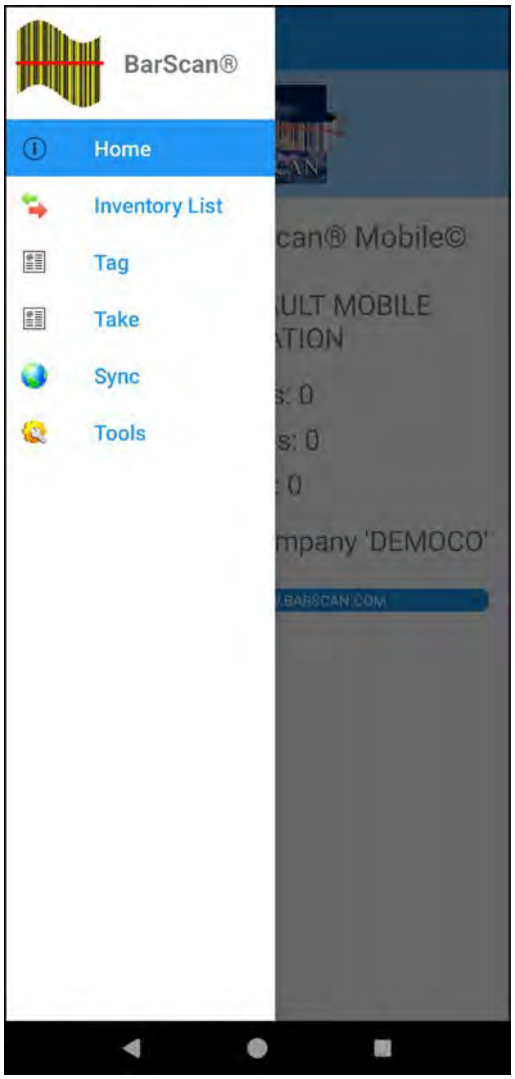
Select the Bar|Scan Flyout Menu. Select the Tag button to begin a Tag inventory as shown below.

A Tag inventory is used to inventory an asset or assets for the very first time.

The prompts that you will see on your Tag Menu will differ based on the device configuration that was downloaded into your device.

The Tagging features in the device are designed specifically to cycle over and over. This means that once you have finished recording the information for one asset, you are automatically positioned to start recording the next asset.

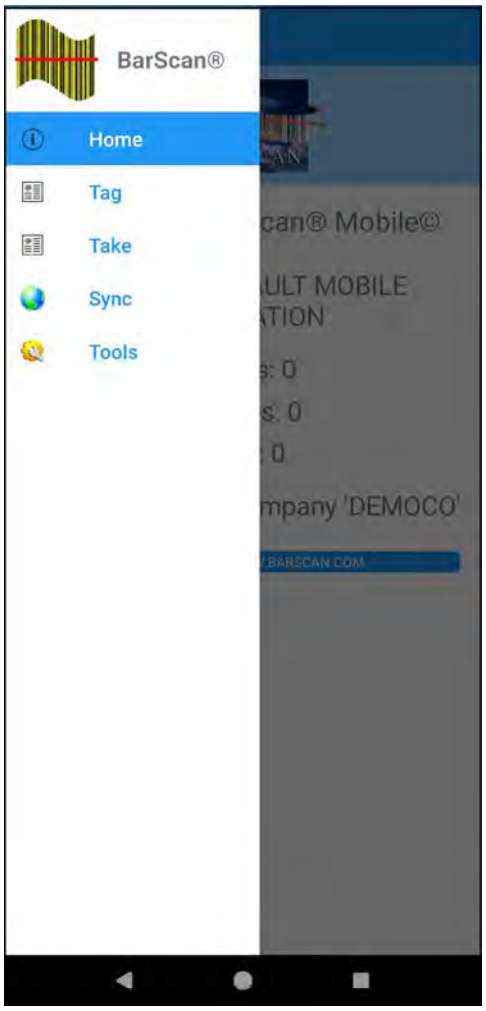
The Label Replacement item should not be necessary during a Tag. This item is used during a Take inventory when an Asset Label that was applied during a Tag is worn, damaged, or peeling off. By entering both the old and a new Asset Number, you will make the system keep all of the old asset information and replace the asset number. Bar|Scan will retain the old asset number for reference purposes.



TAKE

Select the Bar|Scan Flyout Menu. Select the Take button to begin a Take inventory as shown below.

A Take inventory is used to update information for an asset that already has a bar code label or asset number on it. It can also be used to update information in quantity inventories.



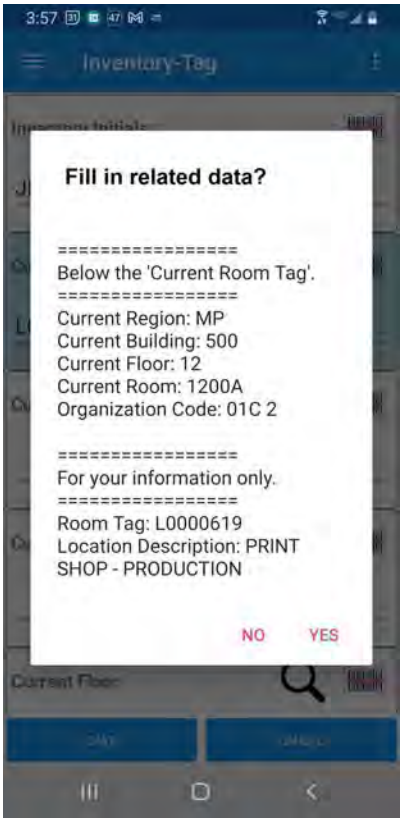
The prompts that you will see on your Take Menu will differ subject to the Configuration that was downloaded into your device.

The Take inventory features in the device are designed specifically to cycle over and over. This means that once you have finished recording the information for one asset, you are automatically positioned to start recording the next asset.

Fill In

As mentioned in the configuration section of this Chapter, you can specify information for Bar|Scan to fill in (or display) when you perform a capture. This is what we refer to as the **Audit Scan.** This feature is optional and can be turned on or off in the Tools section - Settings tab - of the Mobile Application.

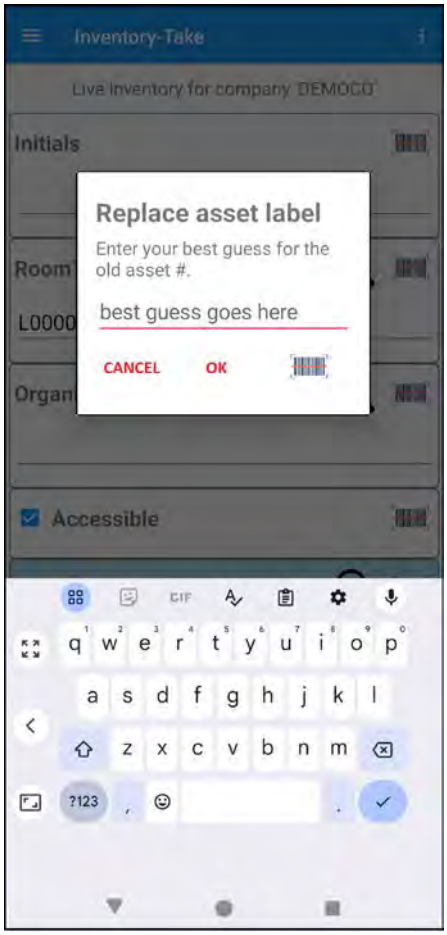
This is very useful for a number of reasons previously discussed. When you use the Fill In feature and you capture the specified bar code, you will see a dialog box similar to the following.



Tap on the Yes button to fill in the desired fields or No to abandon the fill in for this selection.

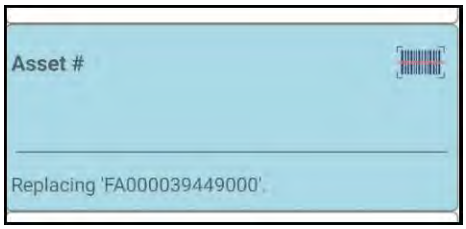
Label Replacement

When you select the Label Replacement Menu item, you will see a form similar to the one at the right.



You can capture the bar code if it is still readable, or using the keyboard, enter the old asset label number. When finished, tap the OK button to be returned to the Take screen.

You will see the note below the Asset # prompt showing the label that will be replaced as displayed below.



Both the new and old asset # are saved.

Inventory List

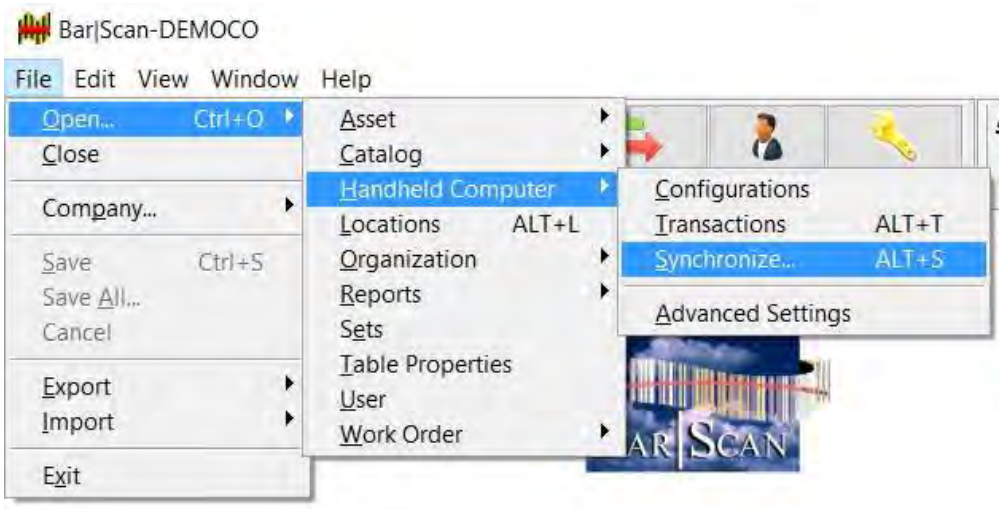
This allows you to review information that you have already collected in TAG and TAKE mode. You can search or filter to make finding items easier. You can also delete items. This is discussed in more detail later in this chapter.

Performing a Synchronization

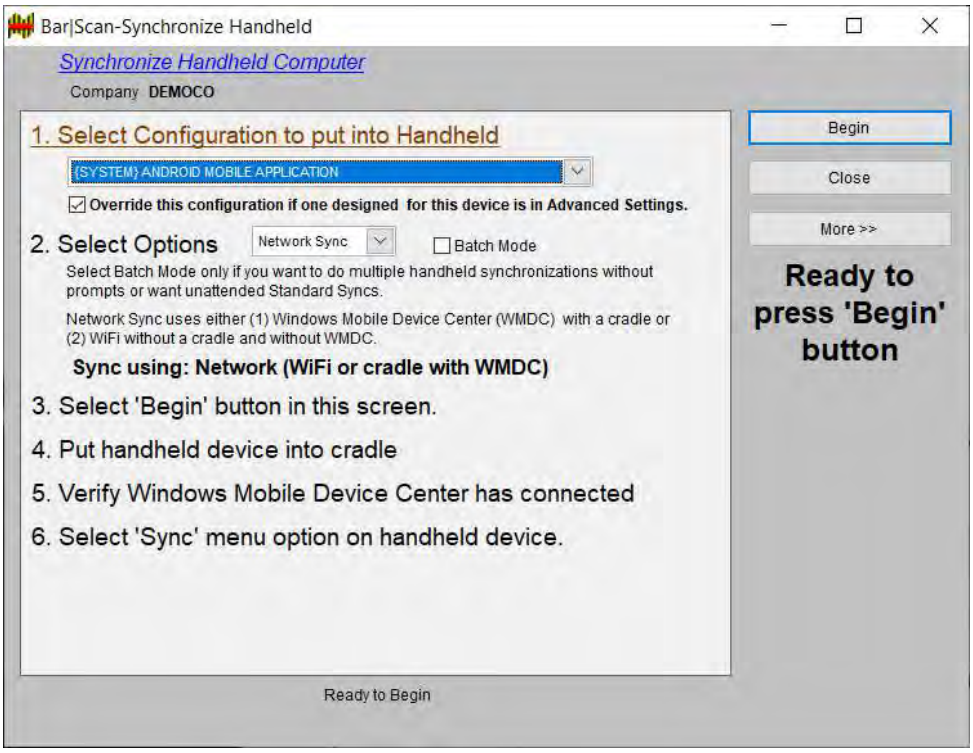
When you are ready to do a synchronization, your device is ready to go if you have Wi-Fi. If you are connecting via USB, you should set the device into the cradle, ensuring that the cradle's cable is hooked to the correct port in the back of your computer. Go to the Bar|Scan Main Menu of the device.

You should initiate the synchronization from the computer by clicking on the Synch Icon on the Bar|Scan Main Menu as illustrated below.

Or select File, then Open . . . ▸, Handheld Computer. . . ▸, then Synchronize as shown in the example below.

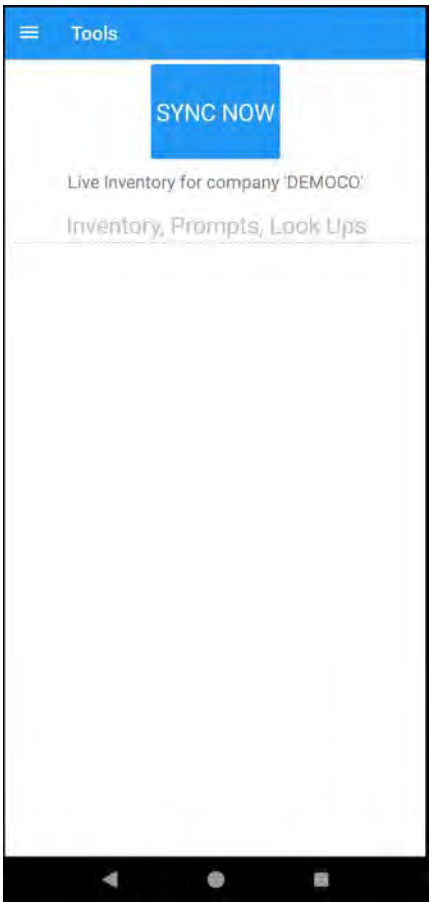


Select either of the two methods and you should be shown the synchronize dialog box as shown below.

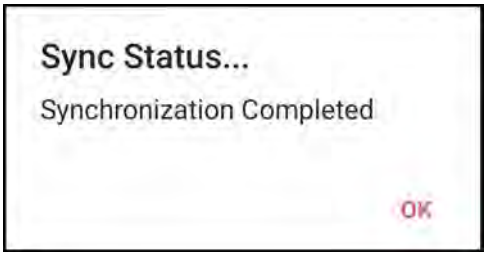


Select the Configuration that you would prefer to use. In the example shown above we selected the **"{SYSTEM} ANDROID MOBILE APPLICATION"** Connection. Then, click on the Begin button. The words "Ready to Begin" that are shown on the bottom of the box above will change to say "Initializing," and then to "Waiting for Connection". Once the words Waiting for Connection appear, tap on the Synch button on the device's Bar|Scan Main Menu.

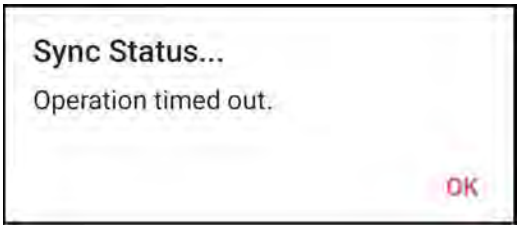
Bar|Scan will perform all bi-directional communication necessary. When you select Sync, you will be shown a dialog box on the device that looks similar to the one at the right.



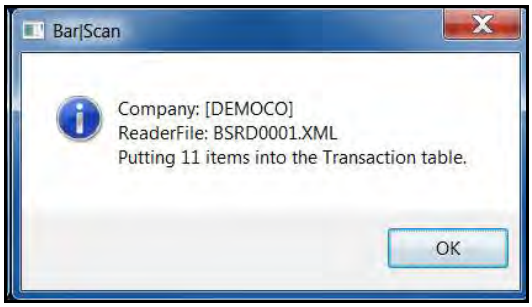
Press the 'SYNC NOW' button. You will be shown a changing dialog on the device that displays the status. When completed, you will see a message similar to the one below.



If there was an issue you may see the following message which means that the synch was unsuccessful. There are several possible reasons for this and there is a complete list in the BarScan Knowledge Base on our website.



The Bar|Scan message below that appears on your desktop can serve as your confirmation. The number of items will vary according to the amount of inventory collected.



The desktop Bar|Scan will remain ready for another synchronization. If you do not wish to synchronize another device, click on the Cancel button to cancel the synch, and then click on the Close button to close the upload dialog box.

It is important that your device has an accurate date, time and time zone setting. Bar|Scan appends this information to every inventory capture. Therefore, when you perform a synchronization, Bar|Scan checks the device's date with your desktop computer's date and if they are different by more than the maximum Time Difference Allowed (in the Bar|Scan Mobile Tools Menu), then the Bar|Scan will warn you with a message prompt.

Unfortunately, because of Android's security settings, Bar|Scan cannot adjust the date, time nor time zone, so it is important to regularly check these in your device before an inventory.

For Additional Information

You can obtain more information on using the Bar|Scan Mobile on our website in both the Support Videos and the Knowledge Base sections of our website. A website password is required which can be requested by sending an email to: techsupport@barscan.com .

TRANSACTION TABLE

INTRODUCTION

The Bar|Scan Mobile Device records the asset information which will be transferred to, and entered into the Bar|Scan system.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

To ensure the information being received from the Mobile Device is correct, consistent, and free from errors, Bar|Scan checks and rechecks the asset information to ensure the validity of the information before it can be transferred to the Asset table.

In addition, Bar|Scan provides several steps which permit you to verify the accuracy of the recorded information.

The information transferred from the Mobile Device is temporarily placed in what we call a **Transaction Table**. This table will hold the information transferred from the Mobile Device until you indicate that the information is correct.

Normally, the process is accomplished as follows:

✓ Optionally verify the Mobile Device's Communications parameters are set correctly using **Mobile Device Configurations.**

✓ Transfer the information from the Mobile Device to the Transaction table using the **Mobile Device Upload** feature. Information can be transferred via the USB or Wi-Fi on most devices. Windows Mobile 5 or greater devices can also send data via Microsoft Outlook.

✓ Validate and optionally print the information in the Transaction table using the **Print** feature while in the **Transaction Reports table**.

✓ Use the **Edit Transaction table** features to correct any discrepancies (validation is automatic for corrected records).

✓ Optionally **Print the Transactions** using the Transaction Reports table, to list the information and produce a final record (an audit trail) of the assets you are going to enter into the Bar|Scan system, and **Mark them as printed**.

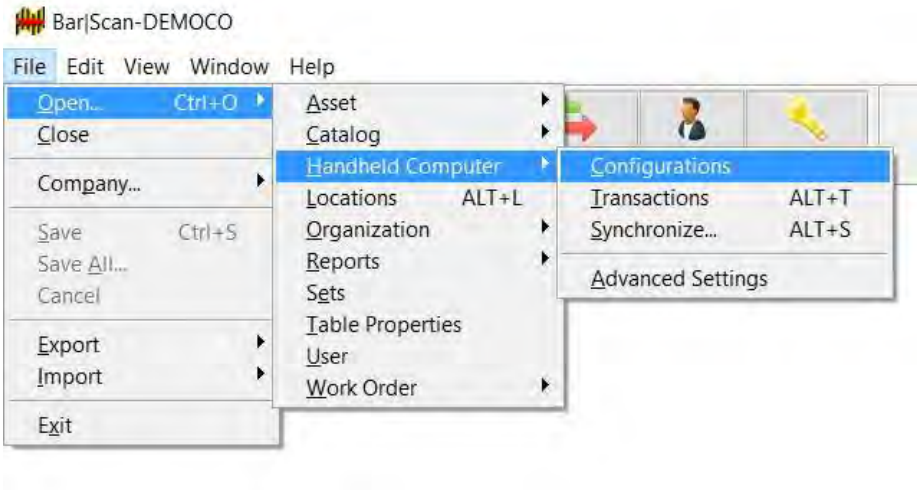
✓ Transfer the information to the Bar|Scan system using the **Move** feature to move the **Transactions to the Asset Table**.

While the previously mentioned process may appear to be a step-by-step procedure for a single transfer of asset information, Bar|Scan is designed to permit you to accomplish any or all of the above tasks when it is appropriate for you.

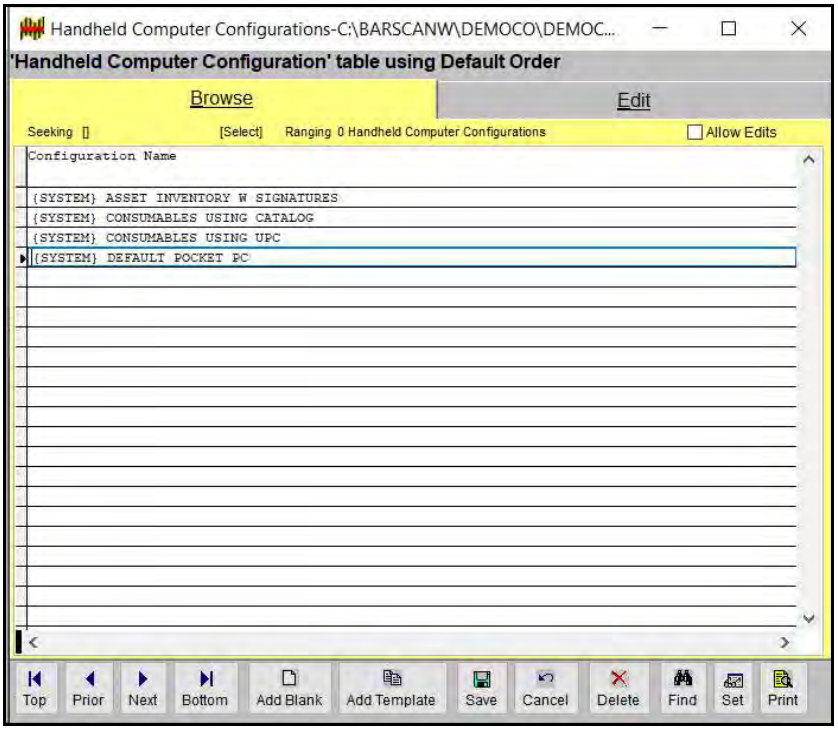
You may, for example, make one or several transfers from a Mobile Device all at once or at different times, each transfer is just added to the Transaction table. You may process the asset records into the Bar|Scan system one at a time, several at a time, or large groups at a time. You can also hold asset records in the Transaction table for later processing.

BAR|SCAN MOBILE DEVICE CONFIGURATIONS

Before you upload, you may want to look at and/or change the configuration settings on your computer. To get to the Configuration table, go to the Main Menu. Select File . . . ▸, then Open . . . ▸, Handheld Computer. . . ▸, then Configurations as shown below.



When you select Configurations from the Handheld Computer pull down, you will be shown another menu like the one below.



This Browse tab lets you select the Mobile Device type and connection, and then you may select the Edit tab to view or change any of the communications options. Most of the time, the default settings will NOT need to be changed.

Hint: Once you select a configuration, it will remain your configuration until you select a different configuration. Therefore, in most cases, it is only necessary to select the configuration one time.

Configuration Name

Each configuration option is given its own name. The *Default Pocket PC* Configuration is the Bar|Scan supplied template for you to create your own Configuration for all Windows CE, Pocket PC or Windows Mobile Computers.

Hint: If you have many users uploading on your network you can create several configurations and name them for your users, i.e., Jackie's connection.

Upload Method

There are two possible upload methods, TCP and serial. On the Zebra MC3200 there is one additional method, USB.

The TCP method supports all bar code equipment using Windows Mobile Device Center including the Pocket PC, Windows CE and Windows Mobile Computers.

Serial methods are used for all older handhelds that attach to a serial or USB port and do not use WMDC. These include the Legacy Symbol PDT3100, SPT1500, 1550 1700, or 1800 series.

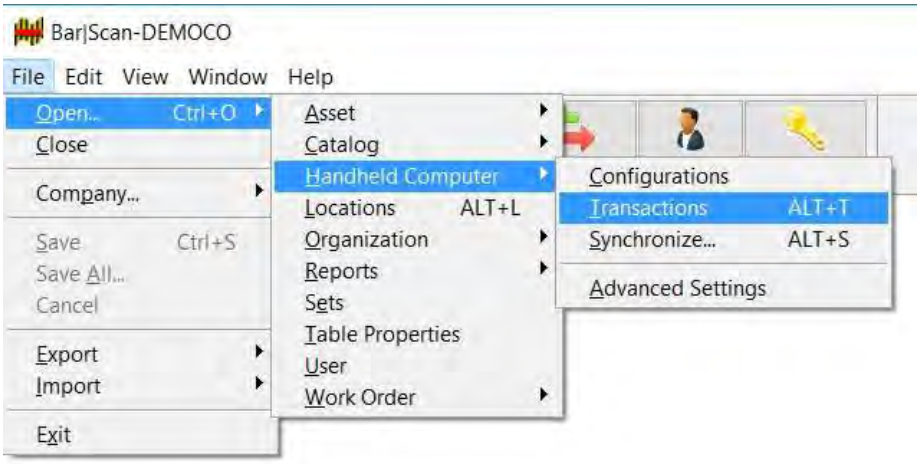
EDIT TRANSACTION TABLE

Bar|Scan will check the information from the Mobile Device extensively once the information is in the Transaction Table, in a process you initiate by selecting to Validate the data.

This feature helps to point out any discrepancies or errors, making it easier for you to correct the data before you transfer the asset records into the Asset table.

When Bar|Scan checks the information and finds an error on a particular asset record, an error message will be associated with that asset record, and will NOT be removed until you correct the problem.

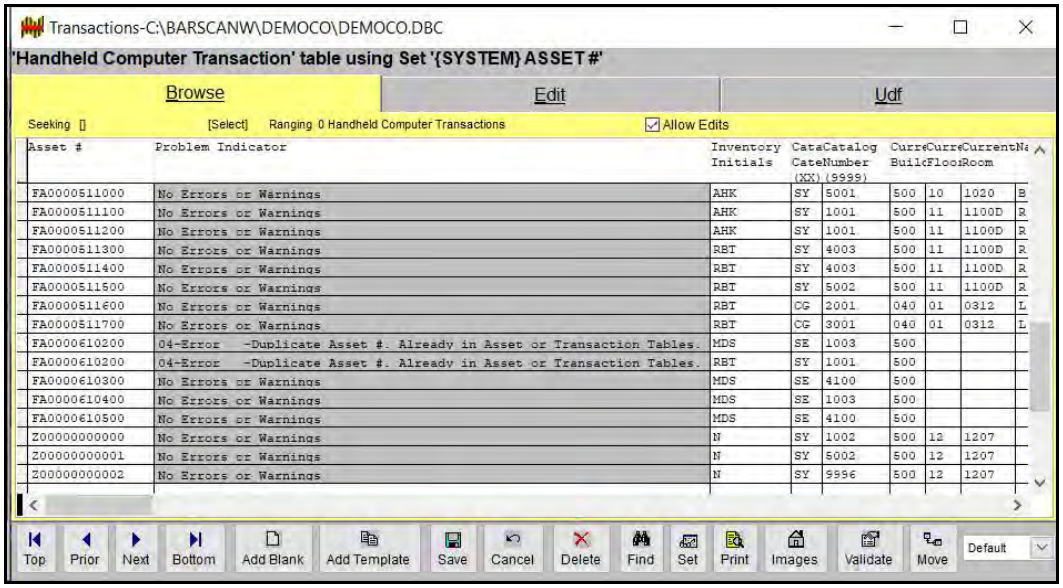
When you wish to view or change information in the Transaction Table, go to the Main Menu, select File, then Open . . . ▸, Handheld Computer. . . ▸, then Transactions as shown in the example below.



Or you may click on the Transaction Icon on your Table Toolbar. The icon is displayed below.

THE BROWSE TAB

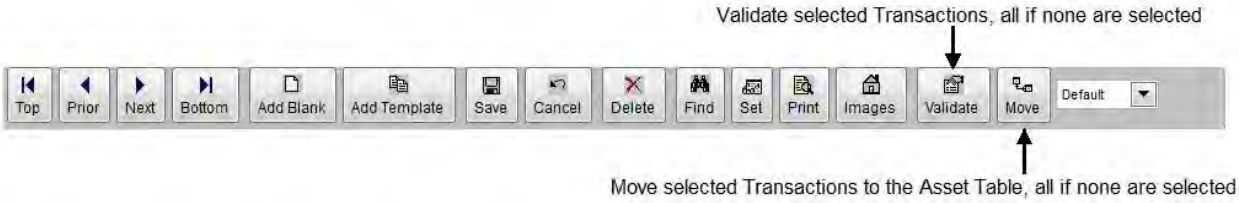
You will be shown a Transaction table similar to the following.



Note: The above will display the information according to the Set that is currently selected in the Set feature.

Also notice that one of the columns in the Browse Tab is “Problem Indicator”. This column informs you when there are potential errors in the items that need to be corrected before the item can move to the Asset Table. In the example above, there are two different problems; “Location not in Location Table” and “Catalog Number is not on file”. If the Problem Indicator column is not displayed on your Browse Tab, you can use the Set Feature to rearrange the columns.

You will notice that the tool bar at the bottom of the panel has four buttons specific to the Transaction table as shown below.

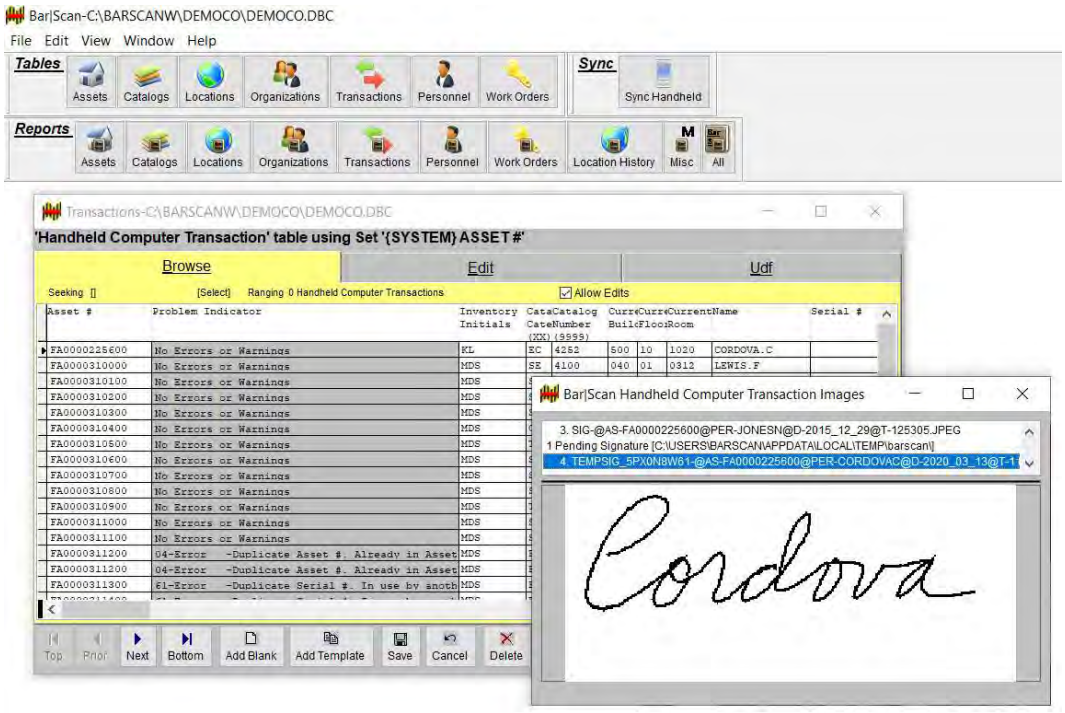


Two of these buttons offer you a second way to validate and move selected transactions. The other method of moving and validating transactions, would be to use the Main Menu Transaction pull down a menu. The 'default' buttons allows you to change the screen mode to 'Check Out'.

Signature Capture

The signature capture is a special type of image and can be reviewed in the Transaction table. Because there is still an editing and validation process, Bar|Scan does not yet create a final jpeg file yet. In other words, there is no image file transferred from the Mobile Device to the desktop and there is no image file for the signature while the data is still in the Transaction table.

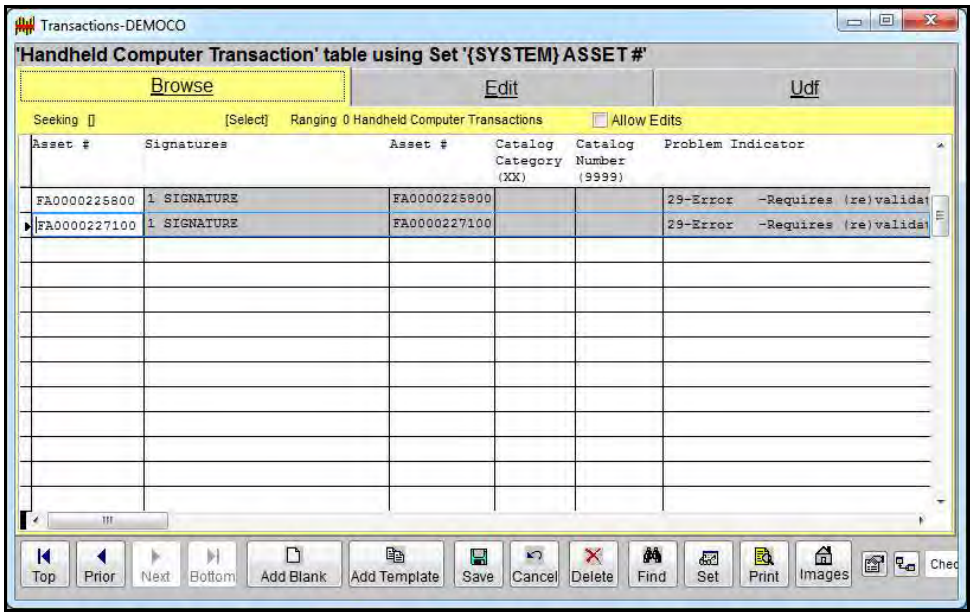
Since the signature file is an original capture, there is also no ability to edit or change it. As shown below, selecting the 'Images' Icon in the Bar|Scan toolbar will display any image, including signatures.



To reiterate, existing images related to the record will be displayed as well as any signatures currently held in the Transaction table.

Signatures are temporary image files generated for viewing inside the Transaction Table. Signatures do not become permanent image files until during the Move from the Transaction to the Asset Table.

While editing Transactions, all signatures are contained in a single signature field called ‘Signatures’. This field can be selected in the Browse List and Set Command. The number displayed is how many signatures are in the signature field. In the example below, there is one signature per asset.



When Validation and Editing are completed, move the Transactions to the Asset table as you would for any inventory. Once moved, a permanent image of the signature is generated into the IMAGES subfolder.

If the image needs to be a shared image among all companies it must be manually moved to the ‘SYSUSER\SHAREDIMAGES’ subfolder.

If at a future time anyone finds it necessary to recreate the signature/transaction, you can import the backup Mobile Device file as usual. These are stored in the READER subfolder.

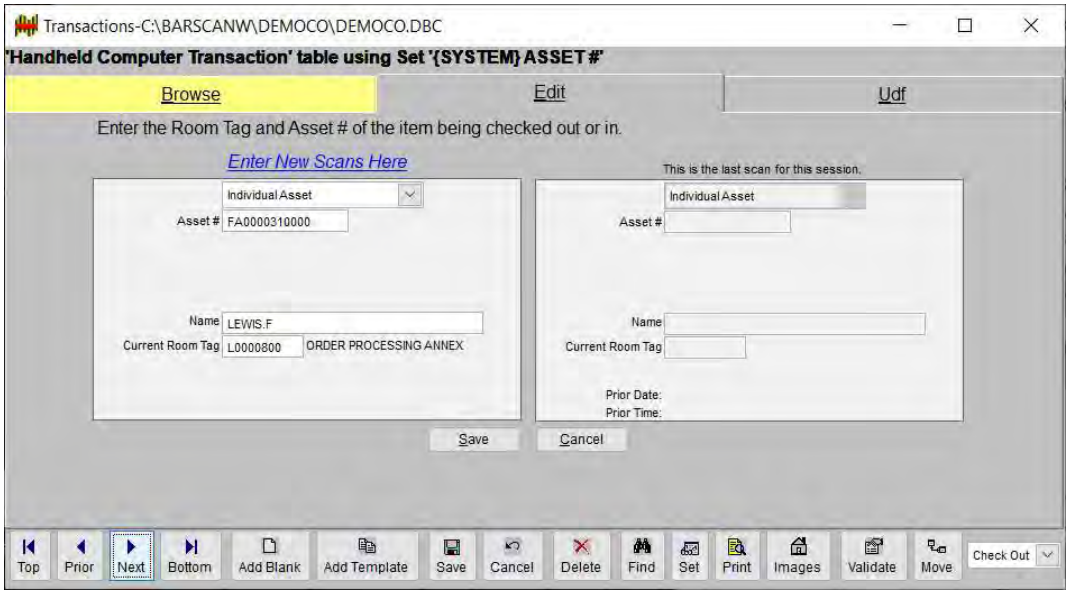
Both the transaction and its related signatures will be loaded. Additionally, the image also contains metadata within the image itself that can be retrieved, including the Asset #, Work Order # and original stroke information.

Check Out

The last item shown on the Transaction table tool bar says Default, and has a down arrow next to it. For most of our customers, this item can remain at the default. But, by pressing the down arrow, you will see the words Check Out. This item is used mainly by warehouses, in conjunction with stationary readers; readers that are permanently plugged into the computer system.

This type of reader does not need to be uploaded, as the information automatically goes into the Bar|Scan Transaction table.

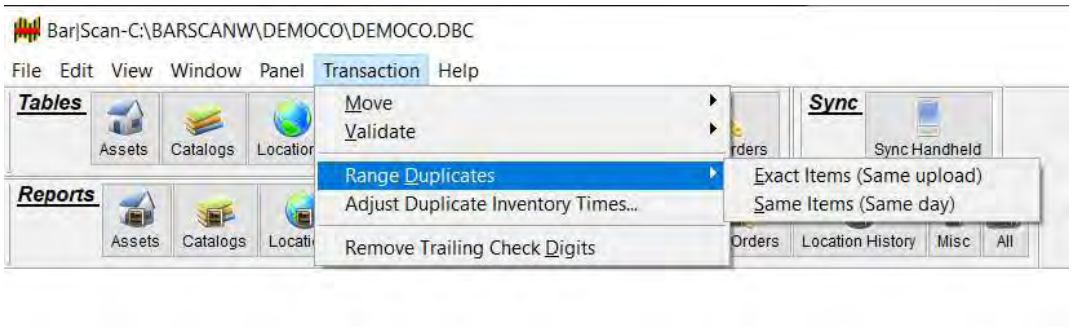
The Check Out mode was designed to only track Takes, with a minimal amount of information. When Check Out is selected, the Edit tab will change to show only the Asset number, Name and the Destination Room Tag as shown below.



However, the information of scans done in this manner are included along with the regular Transactions, not in a special table.

The Range Feature

When you have the Transaction table open, the Main Menu changes slightly, so that the Transaction Features are listed next to the Help as shown below.



You can use this feature to Move Transactions, Validate Transactions, Range Duplicates, Adjust Duplicate Inventory Times or to Remove Trailing Check Digits.

From time to time you may Synch a Mobile Device that has had part or all of the information in it Synchronized before. For instance, you Synch a Mobile Device with 50 assets in it, and set it down. Someone needs to use the Mobile Device, and comes up and takes it. They inventory five items with it, and then bring it back to you so that you can Synch it. The Mobile Device now has 55 assets in it, and 50 of them have been Synchronized before.

Synch the Mobile Device as normal, checking to ensure the information goes into the Transaction table, like normal. Make sure that you do not have any transactions ranged. Validate the transactions. Once the validation has been done, go to the Transaction feature, and select Range Duplicates. Immediately all of the transactions are compared to each other, and any "EXACT" duplicates will be ranged for you, and you may safely delete them.

Any items that are duplicated that are not EXACTLY the same, will not be ranged. Therefore, it is safe to simply delete any items that are ranged with this feature.

This feature only checks for one duplicate. This means, if you have Synchronized part of a Mobile Device three times, the third duplicate will not be located. So, if you think there is a chance that you have uploaded any of the transactions a third time, simply wait until you have used the Range Duplicates feature, and have deleted those that were ranged. Then, validate the transactions again. Again select the Range Duplicates feature. If there are any items ranged for you during this process, it is safe to delete them.

Adjust Duplicate Inventory Times

This feature applies only to the legacy Symbol PDT3100 because it's internal clock is only accurate to the nearest minute. Other supported Mobile Devices have internal clocks that are accurate to the nearest second.

From time to time you may synch a Mobile Device that has scanned an asset at two places within the same minute, or, you have multiple Mobile Devices that scan the item at two places at the same time. This may occur in a warehouse environment where assets are rapidly moving from dock to pallet rack and back to dock. If this occurs, the "Adjust Duplicate Inventory Times" feature can be used to adjust the time by automatically adding a second to the time of the second scan. This feature requires you to Range the assets in question. It is best to use a Set Command which also orders the assets by Inventory Time, and allows you to review the assets side by side, before you apply this feature.

Trailing Check Digits

If you are scanning the shipping labels associated with your assets, often the manufacture will add a check digit to the serial number or other key information on the label.

A check digit is an extra digit which is derived from the number and added to the end for use in error detection. The problem is that the digit is usually not on the bar code serial number on the asset. Therefore the serial number scanned on the shipping label will be different from the serial number scanned on the asset. This feature removes the check digit.

CREATING AN ORDER AND FILTER - THE SET MODE

On the Transaction table, the Browse panel is selected by default. The transaction information on the Browse panel can be sorted by any field. Place your cursor in the first column on the left, press your right mouse button and select Order By from the dialog pop-up, or select the Set button on the tool bar.

The SET feature allows you to identify a smaller, more manageable group of transactions from which to select, e.g., only those asset records with a problem.

The SET feature operates in the same manner throughout the Bar|Scan system. See the *Chapter 5 - Operating the System* for details about the operation of the SET feature.

When used with the Edit Transaction File feature, SET provides several additional filters as follows:

✓ You may select one or more of the different Inventory Methods.

✓ Either good asset records or records which have problems (indicated on the Problem Indicator).

You may use the Set feature by selecting the Set icon from the tool bar. You may also order, or sort, the information by right clicking on the first column of the browse panel, and selecting Order By, and then a Set.

Important: If you have selected the Set button from the tool bar, and have chosen a set that had a filter, i.e., Bad Transactions Only, right clicking will not erase that filter, but allow you to sort the information in another manner.

THE EDIT TAB

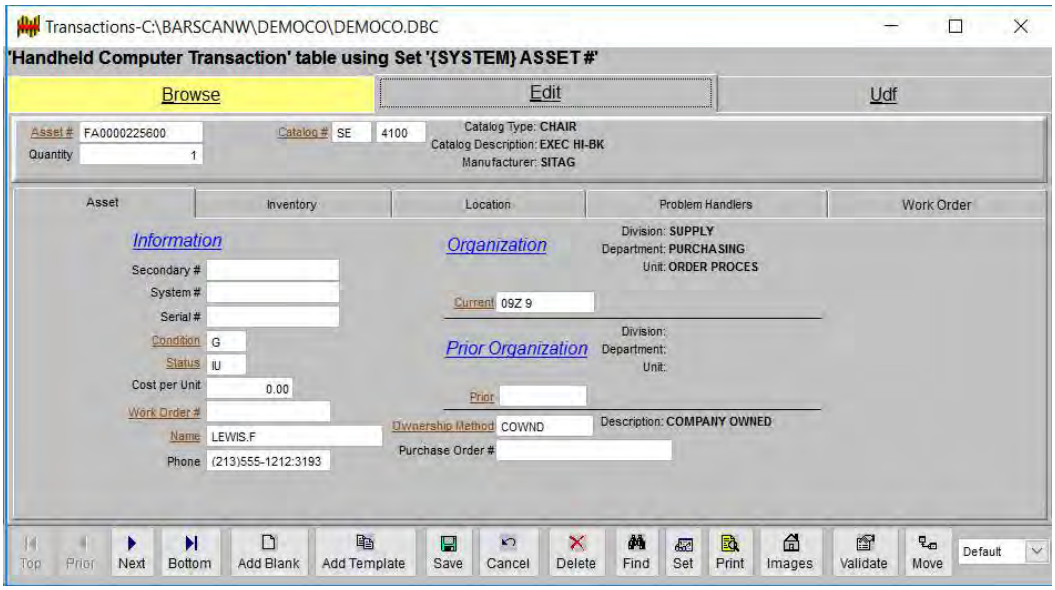
The Browse panel allows you to select an asset record, and the Edit panel displays the information from the Transaction Table about a particular asset.

On the Browse panel, click on the desired record with your mouse, or move the highlight bar with the mouse or cursor movement keys, or start typing the desired Asset Number. When the highlight bar is on the asset you wish to display, press ENTER, and then select the Edit tab.

You can also use the Panel pull down Range, or the F4 key, to select a *Range* of assets to work with. Simply go to the first asset that you would like to range, and press the F4 key. Cursor up or down until you reach the last asset that you would like to include in your range, and press the Enter key. You may repeat this step to set more than one range at a time.

For more instructions on using the *Range* feature, see *Chapter 5 - Operating the System.*

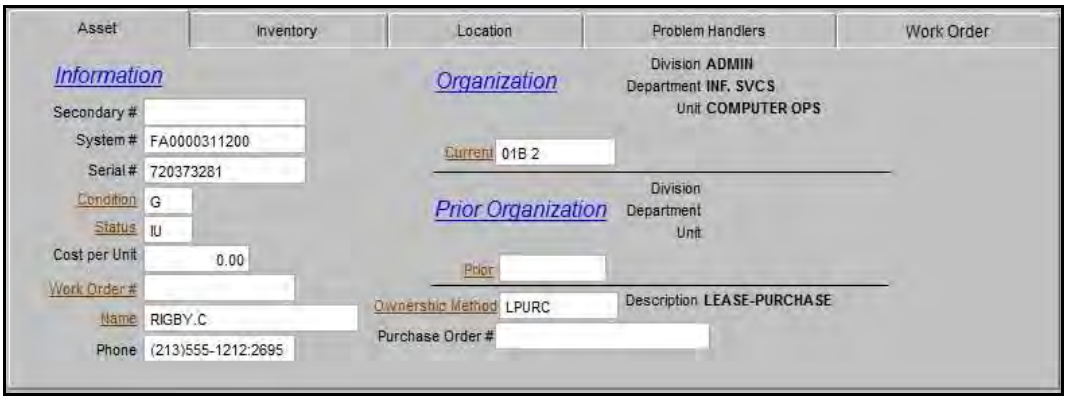
After an asset record has been selected, the Edit Tab will show the asset record information similar to the following sample.



You may use your tab key to move from field to field on this panel. Right click on any field, or use the F5 key, and select Look up Value to view the look up window associated with each item.

You can press the X at the top right of the window, or press the ESC key to return to the Main Menu.

The Transaction Edit tab has five tabs of its own. The first tab is the Asset tab, as shown below.

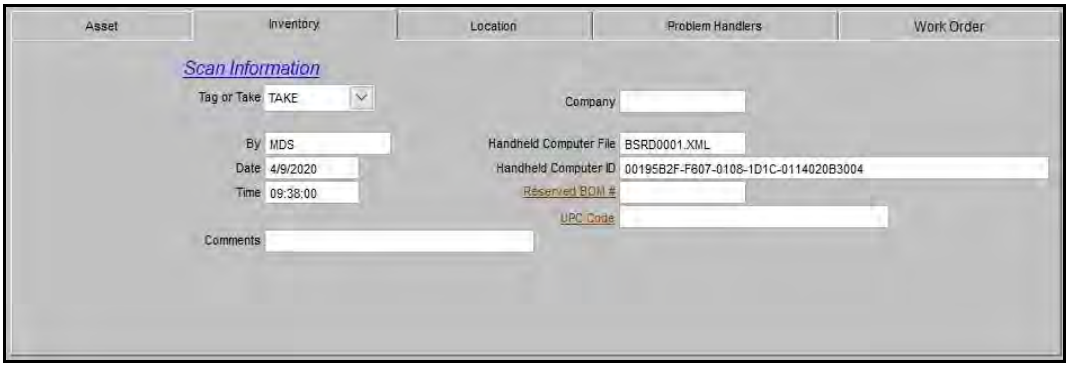


This tab displays information about the asset that can usually be collected in the Mobile Device at the time of the physical inventory, such as secondary number, system number, serial number, condition, status, cost per unit, organization, owner, the name field, and the phone number. It also has additional spaces for the Purchase Order number and the Work Order number.

Note that several of the items such as Condition and Status are highlighted and underlined, this represents that each contains a hyperlink to their corresponding choices in another part of Bar|Scan. Simply click on the underline under Condition, to be taken to the Condition table.

The Cost per Unit field is an optional item, used if you are using the Cost Averaging and accounting fields in Bar|Scan. This item can be entered using one of the Mobile Device's UDF fields, or it can be entered at your computer. This field should contain not only the purchase cost of an item, but also including all costs to get it to you.

The second tab that appears on the Transaction Edit is the Inventory tab, as shown below.



This tab shows the information from the set up of the Mobile Device: what inventory method was used, the initials date and time of the inventory, the inventory comments, the Company, and the Mobile Device file that the information is stored in after the upload.

Tag or Take

This item tells you how the information was recorded in the Mobile Device. When you select an asset record, the information in this entry will appear to show you what inventory method was selected on the Mobile Device when the information was recorded.

The number of selections available depends on your Mobile Device model. Normally, from two selections are available on the Mobile Device; TAG, TAKE.

You may use the down arrow on the right side of this field to change the selection if necessary.

Changing the Inventory Method can either fix or cause problems. Read the following Sections before you make a change.

Tag

TAG (inventory) is used by the Mobile Device to initially record the information for a new asset. When this method is selected, Bar|Scan will assume that the asset is completely new and there is NO existing asset in the system with that Asset Number.

Use caution when changing the Inventory Method. If an asset has been TAGged and you change the method to TAKE (inventory) an error message will be generated for the asset if there is NO currently existing asset in the Bar|Scan system. If there is an existing asset in the system, the information in the Transaction table will REPLACE the existing information for that asset; thus you could lose information if the Asset number was recorded incorrectly.

Take

TAKE (inventory) is used by the Mobile Device to record inventory information about existing assets. When this method is selected, Bar|Scan will assume there is an existing asset in the system. If not, an error message will be associated with that asset record in the Transaction File.

Unknown

When there is not enough information to determine if the items inventoried were done in a Tag or Take mode, they are placed in this category. This is usually due to an error in the transmission of Mobile Device information.

Mobile Device File

Every upload is named and stored as a separate file for backup purposes. These are collectively located in your *Company Name*/Reader folder. The Mobile Device are automatically numbered by Bar|Scan. Once the number reaches 999, they are recycled and the older files replaced.

These files can be imported into the Transaction Table at any time by selecting from the Bar|Scan Main Menu: File ▸ Import ▸ Mobile Device ▸ File and browsing to the file you wish to import. Select the file either by file number or by the date and time of the file.

A backup of each synch is saved in the company\reader folder. This can be useful if Transactions are accidentally deleted since these file scan be easily imported into the Transaction Table. They also provide extra diagnostic information when there are Mobile Device problems.

For inventory results sent from the mobile device to the desktop, the file name structure is:

BSRD9999.XML where 9999 is the number of the upload in sequence.

If BarScan determines that the file has corruption then the file name structure is:

BSUN9999.XML where 9999 is the number of the upload in sequence.

For configuration information sent from the desktop to the mobile device, the file name structure is:

HandheldBackupFolder + "BSHHXL_" + HandheldID + "_" + KeyName + "_" + Date + Time + ".txt"

Where:

HandheldBackupFolder = Handheld Folder (the 'Reader' folder)

HandheldID = The ID number of the specific handheld receiving the download.
KeyName = The type of file being sent to the handheld. E.g. "bslookupsv2" = the quick lookup data, for example "bslookupsv2info" = Descriptive information about the bslookupsv2 data.

Mobile Device ID

Every upload can be traced back to the Mobile Device that collected the Transactions. The Mobile Device ID is the unique device ID in GUID format. This ID can be found in the Computer's Setting Screen.

This can be useful in helping to diagnose problems that might be related to hardware or software malfunctions.

The third tab that appears on the Transaction Edit is the Location tab, as shown below.

This tab lists the Current location of the asset as it was entered into the Mobile Device. The fields listed will be determined by the type of location that was entered into the Mobile Device. The above example displays a Site location.

Bar|Scan will permit the user to identify items in quantities. So, if you have many of the same item, and these items are not going to have an actual bar code placed on them, you can still account for them in your database. However, it is necessary to use Room Tags in order for this feature to work properly.

If this item was inventoried using a quantity mode, the Mobile Device would not ask for an asset number. When inventorying assets in a Tag mode, the Mobile Device would ask for a Room tag, a Catalog number and a quantity. If the items were done in a Take mode, the Mobile Device would prompt you for the current Room Tag, the Destination Room tag, Catalog number, and the quantity.

When the quantity mode has been used to do a Take, and both Room Tags are entered into the Mobile Device, the prior location will be listed on the tab above, as well as the current location.

Hint: Unless you are doing a Quantity Mode inventory do not enter information into the prior location, it will not change an Asset's Location History.

The fourth tab that appears on the Transaction Edit is the Problem Handlers tab, as shown below.

This tab has fields for the information about the asset label, if it was replaced, and if so what the new and old asset numbers were. It has a check box for a response from the Mobile Device if the location listed was accessible. Next there is a space for you to put the transaction on hold, so that it cannot be moved to the Asset table.

The large section in the middle of this tab is used to list any problems that Bar|Scan has detected during the validation process. You have the option of ordering these error messages by number or by description. Finally, on the bottom right of this tab, there is a place that will show if these assets have been marked as Printed.

This feature is designed to assist in defining and correcting problems with the asset records transferred from the Mobile Device.

This section of the Edit tab provides several items which are used to provide you with the information to correct problems with asset records after they have been transferred from the Mobile Device.

Replace Asset Label

When TAKING (updating) your inventory, you may encounter some bar coded asset labels that are damaged or placed in the wrong location on the asset.

When you encounter a damaged Asset Number label, you can instruct the Mobile Device that you wish to do a label replacement.

If the label replacement feature was used in the Mobile Device, and you upload, then look at the Problem Handler's tab, a check mark will have been placed next to the Replace Asset Label field, and a new and old Asset number will be displayed.

New Asset Number

When TAKING inventory, you may encounter Asset Number labels that are damaged or missing. As discussed above, the Mobile Device permits you to assign and record a new bar coded label for the asset tag by using the Replace label prompt after scanning the new asset label.

The Replace Label command in the Mobile Device will put the new asset number into the Asset number field, as well as placing the old asset number in the Old Asset Number field.

While Bar|Scan will make an automatic replacement of Asset Numbers when it finds them, it is important to note that, when you assign a new Asset Number, there **MAY** also be an existing asset in the system with another number (a duplicate). If this is the case, you should make every effort to find the Old Asset Number and delete it.

For more information on replacing labels with the Mobile Device, refer to *Chapter 11 - Bar|Scan Mobile*.

Old Asset Number

When TAKEing inventory, some of the bar coded asset labels may be damaged or missing.

In the Mobile Device, use the Replace Label command when you need to replace a damaged asset tag with a new one. This command can only be used at the Asset prompt in TAKE.

You will be prompted for Old Asset Label. Bar|Scan will automatically place the Asset Number field in the Transaction File with the New Asset Label, and display the old asset number if you have entered it into the Mobile Device.

For your convenience, a report containing only those asset records with these problems can be produced by using the Transaction Report feature.

While replacing a label does not create a transaction problem, other problems may still occur. These problems must be corrected before Bar|Scan will permit the asset records to be transferred into the system.

Location Accessible

One of the optional questions asked by the Mobile Device when you TAG and TAKE inventory is; "Is the Space Accessible?". If the space in inaccessible, you should select 'No' at this prompt. When the information is transferred to the computer, Bar|Scan will contain the location and it will be marked as inaccessible.

Spaces can be not accessible for a variety of reasons such as a conference in session in a conference room or the office may be locked.

This feature is designed to save time during the TAKEing and TAGging of inventory. The person using the Mobile Device can record a location and move onto the next location. Later, a report can be produced containing the non-accessible locations and provisions can be made to access the assets all at once, rather than disrupting the inventory process each time an inaccessible location is encountered.

After you print your report, in most cases you will delete asset records that have been marked as *Not Accessible* since these are not real assets but simply place holders. Remember that Bar|Scan will NOT permit any asset record designated inaccessible to be inadvertently entered into the asset file.

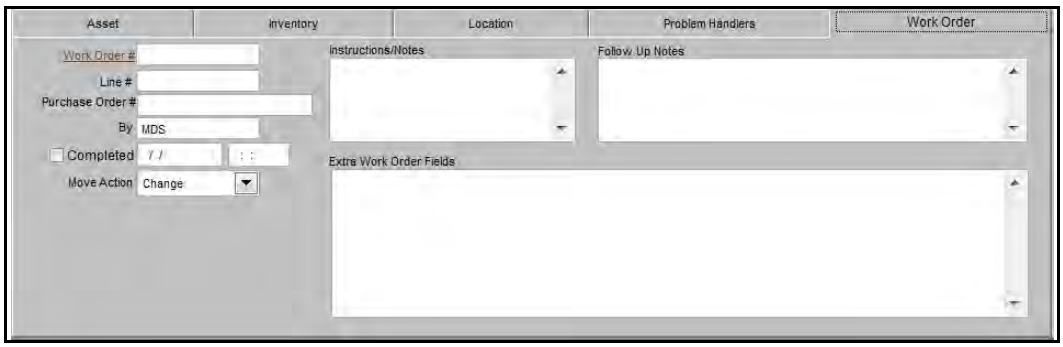
Hold This Asset

There will be many occasions when you will not be sure of the validity of the information transferred from the Mobile Device. This feature will hold the asset record in the Transaction table until you release it, even if *No Problems Exist*.

Use this feature when you wish to have certain asset records checked and verified. You can produce a report containing only the asset records on *Hold* by using the Transaction Reports table. You can then provide the report and a Mobile Device to have someone verify the asset records.

If **N**(o) is entered, the asset will NOT be held in the Transaction table when the asset record has NO problems. If **Y**(es) is entered, the asset record will be held in the Transaction table even if no problems exist.

The forth tab that appears on the Transaction Edit is the Location tab, as shown below.



This tab contains information collected as part of the Work Order or Service Order Feature of the Handheld.

When using Work Orders or Service Orders, the Main Menu screen of the handheld will always display the total number of Assets inventories by the number of Tags and Takes.

If Work Orders have been synchronized into the handheld then the fifth tab of the Transaction Table will contain the results of the information entered in the Service Mode.

Change Errors to Warnings

There might be occasions when Bar|Scan's validation generates an error that you might wish to override. For example, you might wish to ignore the message "Serial Number Mismatch" because you are replacing an incorrect serial number with a corrected serial number. You can change the message to a warning so that the Transaction will move to the Asset Table.

For permanent changes to validation, you can adjust the validation messages on the Transactions Validation Error Messages Screen which is discussed in more detail in *Chapter 13 - Housekeeping.*

ENTERING A NEW ASSET

Use the Add Blank or the Add Template button to manually enter new assets into the Bar|Scan system. It is expected however, the vast majority of your company's assets will be entered into the Bar|Scan system using the Mobile Device.

If you choose Add Blank, a blank record will appear, then, on the Edit tab you may add information or make changes to this blank record. Many of the entry items have associated look up windows to assist you with your entry.

You may use the TAB key, the arrow keys, the mouse, and the ENTER key to move to the different items on the screen. The PgUp and PgDn keys will display information from the previous or next asset respectively.

For your convenience when adding a new asset, you may use a template. When Add Template is the method of choice, select a transaction record similar to the one you are about to add. After selecting a similar asset record, select the Edit tab and the asset information will be displayed and you can change the appropriate information to reflect the new asset. Many of the entry items have associated look up windows to assist you with your entry.

Press the X at the top right of this screen or the ESC key to return to the Main Menu. Note: if you have pending additions or changes you will be prompted to save or cancel them before you are allowed to close the Transaction table.

Hint: You must complete the inventory tab including the inventory method when adding a new Blank Transaction.

DELETING AN ASSET

This feature will remove assets from the Transaction table. Obviously, caution should be exercised when using this feature.

Often you will find assets which have the error message "duplicate Asset Number" associated with them. This is common because it is simple to record an asset twice, or record the same asset number for two different assets.

The "duplicate asset number" message may indicate two different situations. The same asset number may appear twice in the Transaction table, or the asset number of a TAGged asset in the Transaction table may correspond to an existing asset in the Asset table of the Bar|Scan system.

Before you use the Delete feature to remove a "duplicate" asset from the Transaction table, consider carefully. You will want to make sure the "duplicate" is not actually a second asset which has had the same asset number assigned by mistake.

You may identify a group of asset records which can be removed from the Transaction table all at once. You can use the SET feature to first identify a particular group of assets that you wish to remove and then select a Range using the Range feature.

To delete an asset, first select it in by using the Range feature, press Enter, then select the Delete button from the tool bar, or you may use the Main Menu Panel pull down to select Delete.

You will be shown a dialog box asking you to confirm your choice for deletion. Choose Yes on this box to execute the deletion. You will be shown a dialog box that will tell you that the Deletion is complete.

Note: Confirmation displays can be turned off. This feature is available in the Housekeeping section.

Hint: Print a Transaction Report ordered by Asset Number prior to deleting duplicate assets. It will be very helpful in identifying reasons for duplication. Bar|Scan supplies a System Transaction Report ordered by Asset Number.

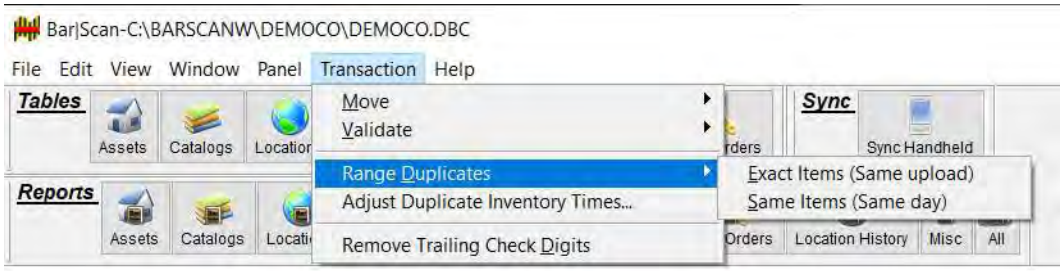
If the duplicate assets are due to duplicate scans by the Mobile Device, and the two are identical, it does not matter which asset is deleted. If, however, the scans are different, i.e., the Catalog number is different, you must be careful to delete the incorrect item, and to ensure that it is not two items in reality.

If you are working on transactions ordered by asset number only, the first asset in the pop-up selection window is always the first asset scanned by the Mobile Device.

Deleting a Large Number of Duplicate Transactions

Someday, you may upload a Mobile Device twice by accident. Or, a Mobile Device may not get cleared before someone chooses it, and continues on with the inventory process. When either of these two things happen, you will find that you will have many exact duplicates in your Transaction table. Bar|Scan has made resolving these errors fast and easy.

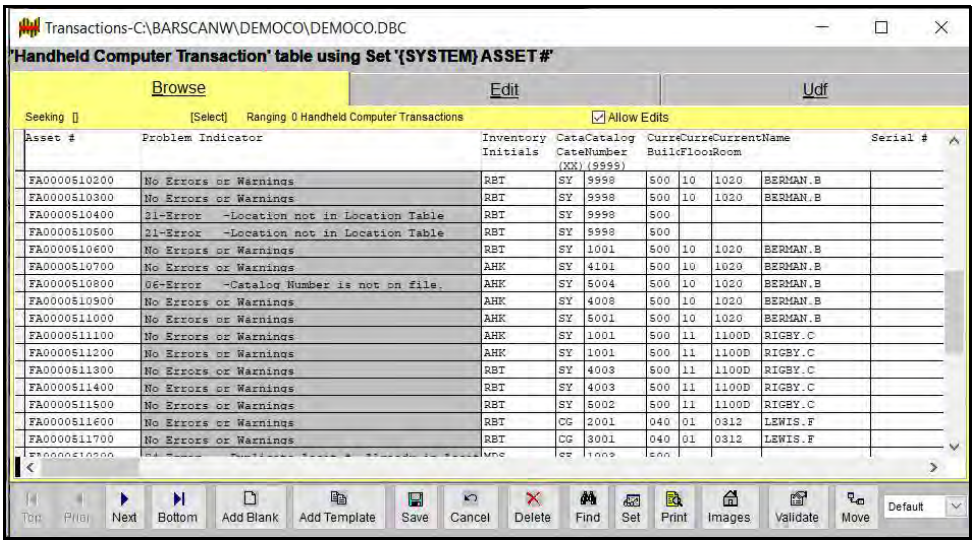
With the Transaction table open, you can go to the Main Menu, and select Transaction . . . ▸, Range Duplicates. You have two choices. Bar|Scan will highlight all of the items that it finds, that are exact duplicates, with the exception of the upload Mobile Device file number and with 'Same Items', the inventory time, so that they may be deleted with just the click of the delete button on the toolbar.



Note: this will not range duplicates where any other item is different, i.e., if the person scanning does a chair, then a minute later does the same chair, Bar|Scan would not consider that an exact duplicate, as the time has changed. In this case, you would choose 'Same Items'.

CHANGING ASSET INFORMATION

This feature permits you to correct records in the Transaction table and prepare records for transfer into the Bar|Scan Asset table. If you intend to make a group change, you can use the SET feature to sort your assets and then use the Range feature to select the asset records you wish to change as shown below.

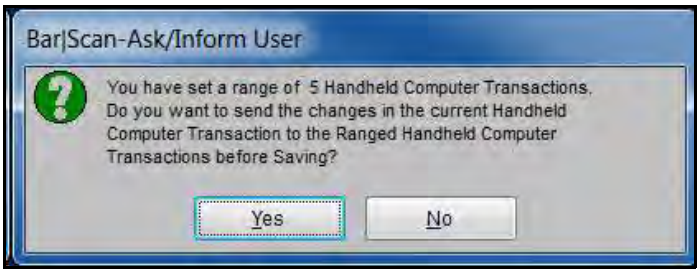


On the Browse tab, move the highlight bar to the desired asset. Select the Panel pull down range, or press F4 and the transaction that you are currently on will change colors; the default color is green, to show that it has been selected. You can then use your up and down arrow keys, the PgUp and PgDn keys, Ctrl + Home or Ctrl + End key combinations, or your mouse to select additional transactions for your range. Once the items that you have selected are all highlighted, press Enter, and then select the Edit tab in order to make your change(s).

Remember to be careful when ranging that you observe how many items are included in your range, displayed in the top right-hand portion of the Browse tab. While it is a nice feature, being able to start and stop a range, and go to a new item, and continue a range, it makes it easier to change items accidentally.

After you have made your changes, press the Save icon on the toolbar, or press the Ctrl + S key combination to save the changed information.

If you have selected a Range of assets for a specific change, you will see a message similar to the following when you attempt to save the change.



The information displayed in the message above will change according to how many items you have ranged.

If you select the Yes button on the previous dialog box, Bar|Scan will save the changes to all of the transactions that you have ranged.

Be careful to always clear your range, after saving your changes.

To clear all of the ranges, press and hold the Ctrl + F4 key combination. The alternative method of clearing the range can be activated only with the Transaction table active. Go to the Main Menu, select Panel, when the drop down menu appears, select Range, then Clear All.

Understanding the Validation Process in the Bar|Scan Transaction Table

Bar|Scan processes all TAGS then TAKES. The system will check for many different types of errors.

Note: When Bar|Scan points out an error, it is only a way of showing you that the information does not match existing data in your Bar|Scan system, i.e., Catalog number is not on file. The information in this transaction may be correct, but the Catalog had never been created before, and the Catalog number has not been entered into your database, yet. To correct this error, simply verify that it is a new Catalog, and then enter the new Catalog into the Catalog table. Re-validate the Transaction, and the error disappears.

For instance, when checking Tags, the system will give the "Duplicate Asset #" error when there are duplicate TAGS in the Transaction table, or if the asset number already exists in the Asset table. Note that "Duplicate Asset #" errors do not occur when there are multiple TAKES for a particular asset number. Multiple TAKES are updated by date and time.

For instance, when checking TAKES, the system should verify that the asset is in the asset table since it will not process the TAKE unless the TAG was processed first. If the asset is being created by a TAG in the transaction table, it is not necessary to determine if the TAG is in the asset or transaction table.

Both TAGs and TAKEs of the same asset number can be processed simultaneously. Bar|Scan will process them in the correct order.

You may view a list of the items that Bar|Scan checks for when doing a validation, in Housekeeping under Set Transaction Validation Messages.

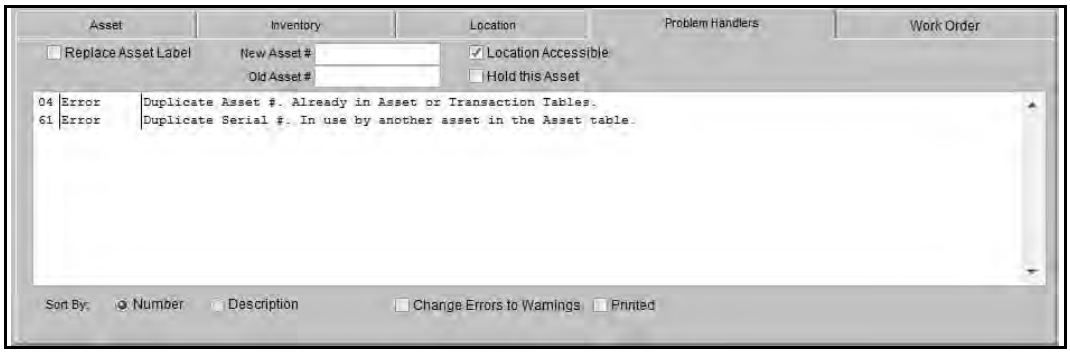
Types of Problems in the Problem Handler Tab

This item is provided as part of the Problem Handlers tab, and is used to identify any problems with an asset record in the Transaction table. One of two different messages will appear when you select an asset record as follows.

- ✓ A Description of the Problem(s)
- ✓ No Problems or Warnings in List

If there is at least one description of a problem that Bar|Scan detected during the validation process, then the problem(s) needs to be corrected before this record can be transferred into the Asset table.

To view the problems, select the Problem Handlers tab as shown below.



There are many possible messages which may appear in this window. Each message may require a different corrective action. In some cases, you might only have to correct an obvious misspelling, in others you may have to remove the asset record from the Transaction table (a duplicate).

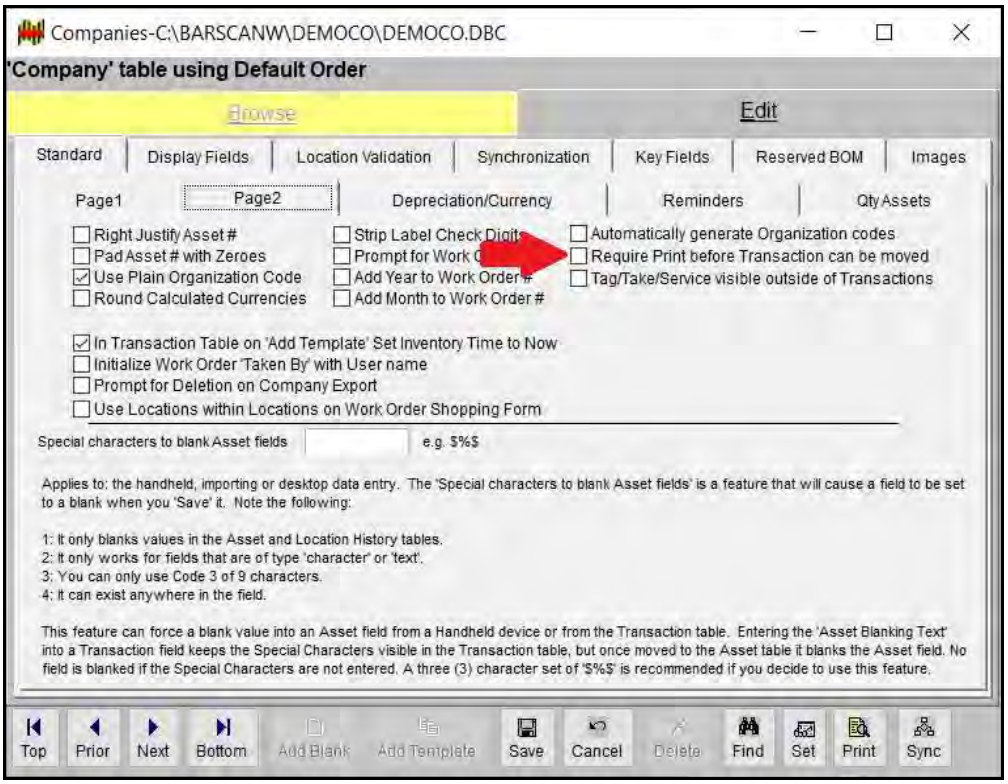
You may correct an error only to find (when you Save the changes) different errors are now presented. Bar|Scan does extensive checking to prevent you from entering the wrong information into, or destroying good information in the system.

As long as any of the problem descriptions appear, the asset record may NOT be transferred into the Asset table. You will have to first correct the problem(s), and then print the Transactions before being allowed to move them to the Asset table.

The message *No Problems or Warnings in List* indicates that Bar|Scan has found no problems with the asset record and it may be transferred into the Bar|Scan system. You may however, need to make changes or corrections even if this message is displayed.

When you make a change to a transaction that previously had no problems, the record is automatically validated, but it MUST be printed BEFORE it can be transferred to the Asset table.

In order to disable the mandatory printing, you can uncheck the “require print” option on the Company Setting Screen as shown below.



The following is a list of the **error messages** that you may encounter, and the main causes for these error messages. Some of these items are very rare, and will only be gotten if you are doing imports, or through malfunctions, or if you need to Reindex. Some of these items are human errors and it is hard to cover all of the reasons you might get the error, but the most common reasons are listed. If you are getting a message that you do not understand how to correct, please call your Bar|Scan representative for assistance.

01 - Unknown Type of Transaction.

This message is very rarely seen. You will get this message only when Bar|Scan cannot determine if the transaction was done as a Tag or a Take.

To correct this error, view the transaction, and see if you can determine the inventory method, then change the field to reflect either Tag or Take.

02 - Invalid Asset number length.

This means that you have a "set number" for your asset number length, and the information was entered into the Mobile Device incorrectly.

To correct this error, the asset must be found, and the asset number must be re-entered into the system correctly. The only exception to this is when the Mobile Device is configured to scan a variable asset number length. Variable asset number lengths must have the corresponding padding and justification features set to Yes in *Company* under the *Housekeeping* menu.

03 - Could not read Asset Number.

This message is very rarely seen. You will get this message only when a number that was uploaded could not be read by the computer. You would have to verify the asset number by physically going to that piece, and then correct it in your Transaction table.

04 - Duplicate Asset #. Already in Asset or Transaction Databases.

This message appears when the item has been officially Tagged twice, or possibly three times. The duplicated tag will either be in the transaction file (most common) or may have been moved to the asset file (less common--more complex to correct).

You must identify which tag is correct and proceed to delete the incorrect tag(s).

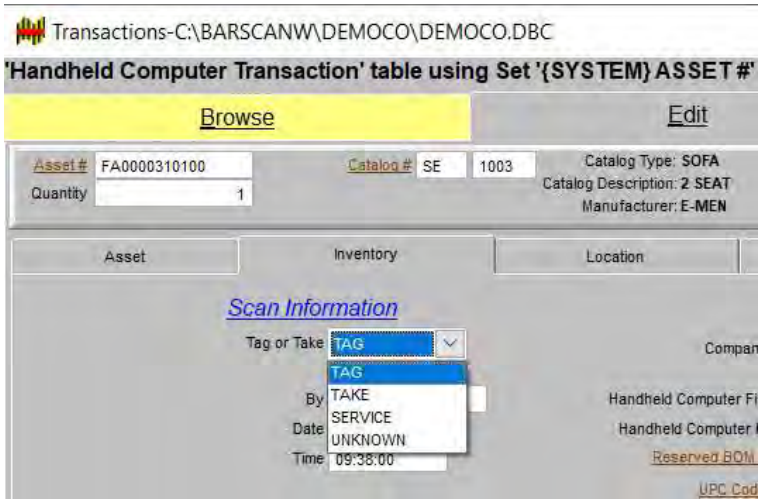
When the asset already exists in the asset database, you must discern why the item was re-tagged and decide whether the existing tag is correct or if the new tag should be used instead. If existing tag is correct - delete the new tag in the transaction table. If the new tag is correct, you can update the information in the Transaction table, by placing the old asset number in the old Asset number field in that transaction, therefore retaining the old inventory information.

05 - Asset # is not in the Asset Table.

This can happen when you are doing a Take and the asset was never properly Tagged, but the item had a bar code label placed on it. Or it can happen when performing a Tag, with the Mobile Device in a Take mode.

To correct this error the asset should have a Tag performed on it, using the existing asset number.

If you collected the Catalog Number in your TAKE configuration then you can change the TAG or TAKE setting to TAG and revalidate as shown in the example below:



06 - Catalog Number is not on file.

The catalog developed for that item has not yet been entered into the database.

To correct error, enter all new catalog entries into the database. If that does not correct the error, the Mobile Device user entered the number into the Mobile Device incorrectly, and some analysis is required. When the correct catalog number is unearthed, select the transaction, then select the Edit tab, and make corrections to the catalog.

07 - Catalog Code is not on file.

This can occur when the information is entered into the Mobile Device incorrectly, such as entering FP1012 instead of EP1012.

To correct this error, you need to find the asset, and figure out what the code should be, and enter the correct code into the system. This error is also displayed in conjunction with error #5.

08 - Condition Code should be G, F, P, or NA, etc.

This can occur when the responses for condition have been changed in the Mobile Device's configuration, and not changed on the computer.

The new responses (Condition Codes) have to be entered into the computer to correct this problem. You may use the hyperlink feature to access the Condition Code by clicking on the underlined Condition Code on the Transaction table, then add a new code. You may also have to enter a blank condition code as blank can be a legitimate response.

09 - Status Code should be IU or IS (in use/storage) etc.

This may occur when the responses to the status have been changed in the Mobile Device's configuration, and not changed in the computer.

The new responses (Status Codes) have to be entered into the computer to correct this problem. You may use the hyperlink feature to access the Status Code table, then add a new code. You may also have to enter a blank status code as blank can be a

legitimate response

10 - Asset may not be accessible. Bad HANDHELD COMPUTER response.

This message is very rarely seen. You would only see this message if you are experiencing difficulties with your Mobile Device.

If you ever see this message, call your Bar|Scan representative for assistance.

11 - Location is not accessible.

This is a valid remark most of the time. It is used when an area cannot be accessed when the inventory crew is actually performing the inventory.

The inventory crew responded with "No" to the question "Is Space Accessible?"

To correct this message, examine why the area was not inventoried, and if it was not inventoried, use this message as a reminder for the inventory crew until the inventory is fully performed.

Once the location has been inventoried, simply delete this transaction.

12 - Location not noted.

This message is very rarely seen. This error will show up on any transaction that does not list a location or room tag for the asset.

To correct this error, go to that transaction, and enter the correct location.

13 - Could not read Room Tag.

This message is very rarely seen. You will only see this error message if you are experiencing trouble with your Mobile Device. After uploading the information, the computer could not read the Room Tag.

To correct this error, you may have to physically visit the room, and write down the Room Tag number. Go to the appropriate transaction(s) and enter the Room Tag.

14 - Bad tag/take initials. Should be 1 to 3 letters.

Most of the time this will mean that someone just made a typo when entering their initials into the Mobile Device, but it can also mean there is a communications or Mobile Device failure. Check to see if the field for the initials is blank on the Transaction.

To correct this error, type in the correct initials on the Transaction(s), and save your change.

15 - Bad Date.

The date is a future date. This can happen when the date was typed into the Mobile Device incorrectly.

To correct this error, go to the date field for the appropriate transaction(s), and correct the dates.

16 - Bad Time.

Bar|Scan does not recognize the time listed for the asset. More than likely, someone made a typo.

To correct this error, go to the proper transaction(s) and correct the time shown.

17 - Unknown Organization Code.

This happens when the Organization Code that was entered into the Mobile Device does not match any of the Organization Codes that exist in the computer.

Both of the Organization codes need to be examined. If the one in the Transaction file is correct, it needs to be added to the Organization table. If the one in the Transaction table is incorrect, then it needs to be changed to the correct one already existing in the Organization table.

18 - Invalid Room Tag length. Should be 0 or XX long.

This may occur when the room tag length was set to a specific number in the company

on the computer, and then the Mobile Device's user entered a tag number with a different length, probably a typo.

If the tag lengths change in reality, the company on the computer needs to be set up so that it will allow a varied tag length by selecting zero as the length. Note: The Mobile Device has a similar feature, under Configure, to allow for compatibility.
To correct this problem, research the Room Tag by physically going to that room if necessary. When you know the correct length, either change the Transaction, or change the Location, or change the Room Tag length.

19 - Purchase Order # Missing.

This error message is currently inactive. You should not receive this message.

20 - Purchase Order # Mismatch. Asset in Asset table uses a different PO #.

The transaction has a PO # in it that is different from its counterpart in the Asset table.

To correct the error, go to the Asset table and check the PO # there against the PO # in the Transaction table. Possibly a typo. Or, it may be a different asset. Make the corrections according to your findings.

21 - Location not in Location Table.

This may mean that the Mobile Device's user entered the location wrong, or that an additional location was added, and needs to be entered into the Location table.

To correct the error, check the Location table to see if you have a location that should match the entry. If not, and it is a valid location, you would need to add it to the Location table, and re-validate.

If it was entered incorrectly, go to the transaction(s) with this location. Right click on the location, select the Look up Value, then select the correct location from the look up list. The item(s) will validate when you save your correction(s).

22 - Room Tag not in Location Table.

This can occur when the location prompt was turned off in the Mobile Device, and a Room Tag was scanned, but the Room Tag had never been entered into the Location table (no association exists between the Location and the Room Tag, so Bar|Scan does not know where the Room Tag exists when it is scanned).

To correct this error, the location of the asset must be verified, and then the Location table needs to be updated.

23 - Room Tag/Location Mismatch.

This means that the Mobile Device user entered a location that has a room tag in the Location table, and it does not match the one in the Transaction table.

Verify the actual location of the assets, and check the room tag. If the location is correct in the Transaction table, the Room Tag was incorrectly typed into the Mobile Device rather than having been scanned, or less likely, the room has two Room Tags.

Also, a room tag could have been replaced with a different tag due to damage and the Location table was not updated.

If the actual location is different from the one that was entered, then the room tag may be correct. To correct this, a new location assignment is made. Enter the new location into the Location table, using the Room tag from the Transaction table.

Remember that right clicking on the location field on the Transaction table, and selecting Look up Value, will list all valid locations and their corresponding room tags. Pressing F5 at the Room Tag item will display the same list in room tag order.

24 - Replacement Asset # already exists in the Asset Table.

This error is caused when doing Takes with the Mobile Device, and the user responds Yes to the prompt, Replace Asset Label? This error most often occurs when the operator of the Mobile Device responds Yes (to replace the Asset label), after scanning the **Old** Asset number, **then scans** the **New Asset number**, as it should be done in the opposite order. When label replacements are necessary, the **New** Asset

number needs to be scanned **first**.

This error can also occur when the Mobile Device operator does not apply a New Asset label to replace the old one, i.e., if the item has two Asset labels on it, and one label is intended for deletion, but both Asset labels are in the system.

To correct this error, view the Asset label that has been removed from the piece. If this number is listed in the Transaction table as the New Asset number, and there is a different one listed as the Old Asset number, you simply need to reverse the two numbers, changing also the Asset number field, and save your changes. If there were two labels, and both appear in the Asset table, you will have to check both Assets in the Asset table, and view their Catalog information. You may have to add a Take moving one of these Assets to a "Deleted" location, and do another label replacement for the other label.

25 - Old Asset # is not in the Asset Table.

View information on error # 24, to see the types of things that can cause this error.

26 - Old Asset # in neither the Asset nor Transaction Tables.

View information on error # 24, to see the types of things that can cause this error.

27 - Purchase Order # Mismatch. Tag Asset in Transaction table uses a different PO #.

There are two transactions with this Asset number, but both of them have a different PO #. This may be a typo.

To correct this error, view both transactions' PO # information. If there was a typo, simply correct the wrong one. On rare occasions, the numbers are totally different, and you may have to retrieve the PO # from the original paperwork to see which is correct.

28 - Unable to update corresponding Location table record.

This error message is currently inactive. You should not receive this message.

29 - Requires (re)validation or not validated yet.

This item will appear on all transactions that have never been validated. To correct this error message, simply validate the transaction by pressing the button.

30 - Serial # mismatch. Asset Serial # does not match Transaction Serial #

This message will appear to let you know that the Serial number for the same asset, is listed two different ways. This is most often caused by someone scanning the serial number, while someone else hand typed it. Some Serial numbers that can be scanned include the model number, and sometimes a manufacture date. When hand entering the serial number, the model number is not listed as part of the Serial number.

To correct the error, you will need to view both the Asset Serial number and the Transaction Serial number. If one of the Serial numbers contains the other, simply delete the shorter one. If the Serial numbers are vastly different, someone needs to go back to view the actual asset, and see which number is correct. (Sometimes there is more than one Serial number listed on an asset, one being just for a part).

Check that the Catalog numbers are the same. If the Catalogs are the same, the Serial Numbers may be different but it may be the correct asset. View the differences in the Serial Number, and see if during one of the inventories the Serial Number was inaccessible, and on the other inventory it was accessible. There may have been a typo where the Serial Numbers appear very similar, but someone thought a 5 was an S. In this case, viewing the piece may be the only way to see which was right. Determine the correct Serial Number, and change the wrong one to make both Serial Numbers the same.

31 - Could not read Previous Location Room Tag.

This message is very rarely seen. You will only see this error message when Bar|Scan cannot read a Previous Location Room Tag that was uploaded from a Mobile Device, or through an import.

To correct this error, investigate the information on the items inventoried both before and after this transaction to help establish where this item was inventoried. Normally,

you will be able to determine what the Room Tag was supposed to be without revisiting the room. Change the transaction's Previous Room Tag according to your findings.

32 - Previous Location Room Tag/Location mismatch.

This can happen when you are using both Previous and Current Locations and someone makes a typo on the Previous Location. Or, the Previous Location is listed incorrectly in the Location table. Or, when someone accidentally scans a different Room Tag without changing the location that is already in their Mobile Device.

To correct this error check the information in the Transaction table and the Location table. You may have to revisit the actual location to determine which entry is correct. Correct the information in the Transaction or Location table, according to your findings.

33 - Unable to update Previous Location corresponding Location table record.

This error message is currently inactive. You should not receive this message.

34 - Previous Location Room Tag not in Location table.

This can happen when you are using both Previous and Current Room Tags when inventorying your transactions. The Room Tag that was entered into the Previous Room Tag field does not match anything in the Location table. Someone may have hand typed the Room Tag incorrectly. Or, the Room Tag was never in the Location table or has since been deleted.

To correct this error, you may have to revisit that room to see if the Room Tag number is correct. If it is correct, check the Location table to see if the location exists at all, or if it exists with no Room Tag or a different Room Tag. Correct the information on the transaction or in the Location table based on your findings.

35 - Previous Location not in Location Table

This error can occur when Assets are entered at the keyboard directly into the Asset table with an incorrect Location, or if a Location was previously valid, and has since been deleted from the Location table.

To correct this error, view the Prior Location. If the correct Location exists in the Location table, select it. If not, add the Location into the Location table.

36 - Invalid Previous Location Room Tag length.

The Room Tag is set to a specific length for this company. The Room Tag information in the Previous Room Tag field is not the correct length.

To correct this error, make sure that the information in the Previous Room Tag field is a valid Room Tag. It may be that someone accidentally scanned the wrong field or hand entered the information incorrectly. Look at the Location fields that are equal to this Room Tag. Check the Location table to see if you can simply select the correct location and Room Tag. The item will be re-validated when your changes are saved.

37 - Not enough [Z] Assets matching Catalog and Previous Location.

When Z number assets are recorded for a move, you enter both a previous location (for a move from location) and a current location (for a move to location). This message will appear when you do not have enough items in the Asset table to complete the transaction as stated.

To correct this error, you may have check how many items you are trying to move, it may be a typo. Correct the quantity on this transaction and save your change.

Or, you may have added Z number assets to the total that will be your move from location, but they are not yet in the Asset table. Move your previous additions to the Asset table, and re-validate.

If you add additional fields to the Company Settings Screen, Quantity Asset Tab, these are taken into account when looking for matching Z number assets. So for example, if you add PO#, then do a take without the PO# prompt, this error will appear.

38 - The previous valid TAKE moves this Asset out of the Previous Location.

This Transaction was recorded with both a Previous Location and a Current Location. There is already a Transaction that shows this item being moved from the Previous Location. Probably, this information was accidently recorded twice. But, if both

moves seem to be valid, more investigation is necessary, and on rare occasions you may have to physically go to the Current Locations listed on both transactions to view the Asset numbers.

To correct this error, check to see if the item was simply recorded twice, and if there was something missing on the first one. If there second recording of the move is more accurate, you can delete the first one, and re-validate the second.

If both moves seem valid, you may have to view the Current locations on both Transactions to see if the Asset number itself was incorrectly entered on one of these items. Change the Transaction according to your findings, and save your change.

39 - Location Mismatch: Previous Location not equal to corresponding Asset's Current Location.

This item was recorded with both a Current and a Prior location in the Transaction table. When the corresponding Asset information in the Asset table was checked, the Current Location in the Asset table should be the same as the Prior Location in the Transaction table. For this item, they do not match.

To correct this error view both the Prior Location in the Transaction table, and the Current Location on this Asset number in the Asset table. It may be that the Location is the same, but was entered differently. Or, it could be that a move made in between these was not recorded, or the recording of the move has not yet been uploaded. Make sure that all of your Mobile Devices have been uploaded. If all of the Mobile Devices have been uploaded, and the information is correct, you may have to record a move as having happened prior to the move with the error. Once this move is recorded and has been saved, re-validate the transaction with the error.

40 - A preceding TAKE's Location Mismatch prevents update of this Asset.

This error message is currently inactive. You should not receive this message.

41 - Bad Move date.

This error message is currently inactive. You should not receive this message.

42 - Bad Move time.

This error message is currently inactive. You should not receive this message.

43 - Asset # Quantity changed. Re-validation required.

The movement of Z number assets can cause this message.

To correct this error, simply re-validate the transaction.

44 - Asset # should start with a [Z].

This error message is currently inactive. You should not receive this message.

45 - Previous location is missing.

This error message is currently inactive. You should not receive this message.

46 - Quantity <> Quantity in Asset table for current Catalog and Location.

This error message is currently inactive. You should not receive this message.

47 - Serial # mismatch in corresponding TAG Asset in Transaction table.

There are two Transactions listed that have the same Asset number, but both list different Serial Numbers. This may be because the first item was recorded without finding a Serial Number, and then re-scanned when a Serial Number was found.

To correct this error, view both transactions, and both Serial Numbers. You may be able to tell why the item was re-inventoried. If the asset information appears to be good, and they were not inventoried one right after the other, it may be that someone made a typo. If this instance, you may have to physically go to the asset and view the Serial Number and correct the data according to your findings.

48 - Work Order # not found in Work Order table.

A transaction lists a Work Order # in the Work Order field, but it does not have a corresponding Work Order in the Work Order table. It may be a typo.

To correct this error, view the Work Order number in the Transaction table. It may be that someone mistakenly entered the wrong information into this field, or they simply made a typo. View the Work Orders in the Work Order table, and see if you can tell what the actual Work Order number is. Correct the transaction according to your findings, and save your changes.

If your company does not use the Work Order table, but you want to store data in the Work Order field, you may want to change this validation message to view this as a warning or disable this message. Before disabling a message, contact your Bar|Scan representative, there may be a reason you should not do this.

49 - This Asset not requested in this Work Order.

This transaction was recorded with a valid Work Order number in the Work Order field. But, when the information was compared with the information in the Work Order, this transaction was not specified in this Work Order.

To correct this error, view both the Transaction and the Work Order. It may be that someone mistakenly added the Work Order number to the wrong transaction, or to too many transactions (to 5 chairs not 4) or that a specific asset was requested in the Work Order, and the transaction is the same type, but not that specific asset. Correct your transaction according to your findings, and save your changes.

50 - Duplicate Serial #. In use by another Asset in the Transaction table.

This item was recorded using a Serial Number that was already being used by another transaction. This can happen if an item was tagged twice, when someone did not see the first tag on it. Sometimes, someone may have misread the serial number and it matches another item (in this case both items would have to be looked at). In some cases, the different manufacturers may have actually used the same Serial Number, although this is very rare, it can happen on Serial Numbers of a short length.

To correct this error, view both Transactions and both Serial Numbers. It may be that the item was re-scanned only moments after the first item, because of a mistake in another field. If not, you will probably have to go to each asset, and view the Serial Numbers. Correct the data according to your findings, and save your changes.

51 - Asset and Transaction Location Types must be the same (DOS only).

This error message is currently inactive. You should not receive this message.

52 - Invalid location type.

This can happen on an item that was imported. The location type field may have erroneous data in it, or it may just be a typo.

To correct this error, view the location, and correct the type according to the information in the location.

53 - Not Validated - Belongs to another company

This error is caused by the information in the Company Code field of the Asset not matching the Company database Company Code. If you have a multiple company version of Bar|Scan, you may have uploaded to the wrong company, and the information needs to be transferred to the correct company. If you do not have a multiple company version of Bar|Scan, you do not need to use a Company Code.

To correct this error, check to make sure you have uploaded to the proper Company. If you only have one company, or if you know you have uploaded to the correct company, you will need to go to the Transaction table. Select an asset with the error, and choose the Edit tab, and then select the second tab which says Inventory. On the right-hand side of the Inventory tab, you will see the field listed as Company. Place your cursor inside the Company field, right click, and select Look up Value. If you see only what is in your field, and a blank, select the blank. If there is another Company Code listed, you may have to select the other Company Code. Save your change. If the item now validates correctly, go back to the Browse panel, and Range all of the items that have this error, and repeat the process. To avoid this error next time you upload, find the Mobile Device that has a Company Code listed, and clear that field, or change it to the proper Company Code.

54 - Completed Work Orders may not be updated.

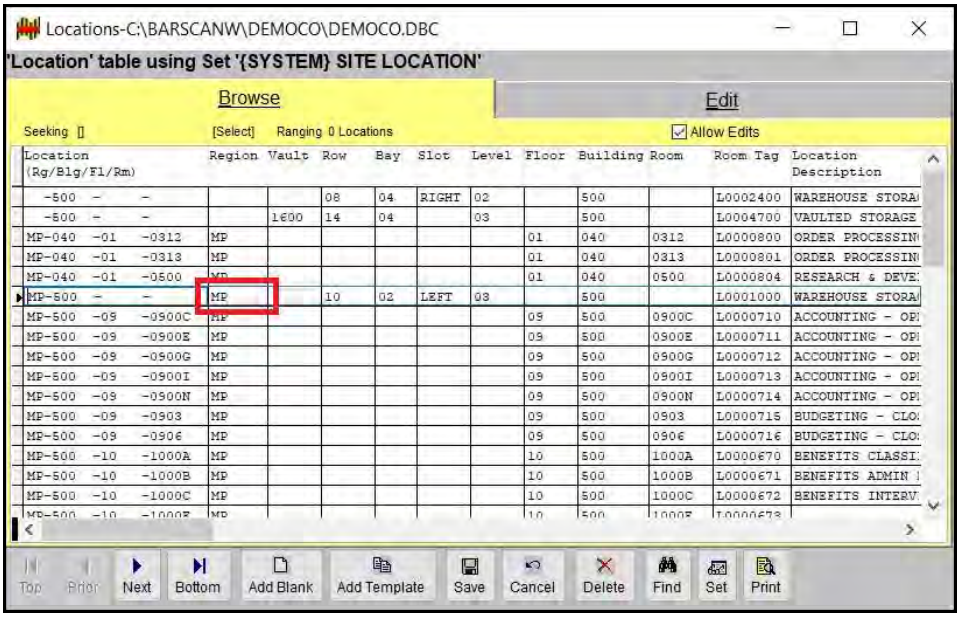
This can happen when a Work Order was marked as completed, and then the Work Order number was used on a transaction.

To correct this error, view the transaction's Work Order number, and if it appears to be a valid Work Order number, you may have to view the Work Order. It may be that it was a typo. On rare occasions, part of the Work Order may have been verbal, and you may have to add a new Work Order and change the Work Order number on the transaction accordingly.

55 - Data exists in one of the location fields not used by this Location Type.

This error may appear when you use more than one Location Type, i.e., Site, Pallet, or Vault. When creating the Locations in the Location table, you have the option of using a template of a current Location. For instance, you may select a Site location as the one to use as your template, when you are actually creating a Pallet location. The Site Location contains fields that are not in the Pallet Location, i.e., Region. If there is data in the Region field of the Site Location that you chose as your template, and you switch the type to Pallet, you will not see the Region listed, but the information is still listed in the Region field.

To correct this error, go to the Location table, view the Location which is used by the Transaction(s) with the error, and remove the information in the field which does not show up as part of the Location Type which you have selected, in this case Pallet. In this example, there is an MP that shows up in the Region field of a Pallet Location as shown below. Pallet Locations do not use the Region field. You would remove the information in the Region field while on the Browse panel, and save your change.



Then, return to the Transaction table, and re-validate the Transaction(s) which had this error.

56 - Missing Location History entry.

There is a Missing Location History entry for this asset number in the Asset table.

To correct this error, go to the corresponding asset in the Asset table, and view the Location History. See if you can reconstruct the missing Location History entry. You may need assistance from your Bar|Scan dealer to correct this information.

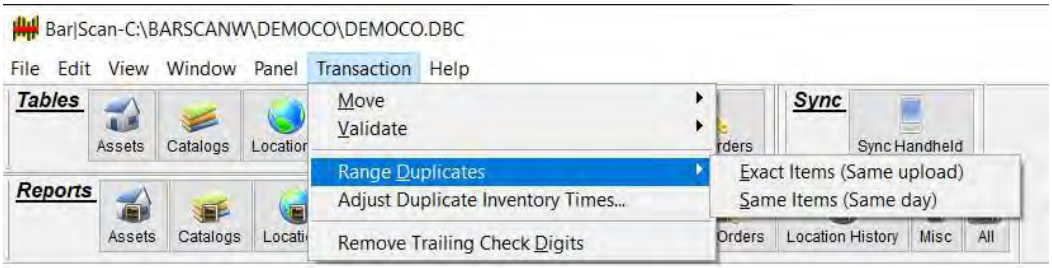
57 - 'Z' Asset #, Catalog and Location do not belong to each other. Re-validate.

This Z number already exists in the Asset table, but the current record in the Transaction table (although it has the same Z number) has specified either a different Catalog or a different Current Location.

To correct this error, please re-validate.

58 - Inventory date/time matches existing Location History or Transaction item.

In most cases this is due to not clearing the handheld after a synchronization. First, try the Range Duplicate feature below:



If the date and time in the Transaction Table matches the date and time in the Asset Table Location History then this Transaction would be a duplicate. You can delete this transaction as you already have it in the Asset Table.

If there are a lot of items with this message, you may have uploaded a Mobile Device twice, and changed some of the data on one set of these items. In this case, Bar|Scan no longer views them as exact duplicates, and will not Range them during a scan for duplicates. It may be that you can use a Housekeeping feature to force Bar|Scan to

adjust the times for you, so that you don't have to do this manually.

59 - Label replacement already exists for this Asset in the Transaction table.

This can happen when someone re-enters the take and label replacement in a Mobile Device on purpose, and one of the entries has to be deleted. On rare occasions, it can happen when an item has two new asset tags on it (because someone did not see one of them).

To correct this error, view both items in your database. You may have to physically go to the asset in question. Change the transaction according to your findings.

60 - Label replacements may only be performed on a TAKE.

This can happen when an item has been changed from a Take to a Tag, and label replacement information was previously recorded on this transaction. Or it can happen when you try to do a label replacement using a TAG in the Transaction table.

To correct this error, view the old and new label information on the Problem Handlers tab. If this information is correct, make sure that the item is a Take, not a Tag. Save your changes.

61 - Duplicate Serial #. In use by another Asset in the Asset table.

This item was recorded using a Serial Number that was already being used by another asset. This can happen if an item was tagged twice, when someone did not see the first tag on it. Sometimes, someone may have misread the serial number and it matches another item (in this case both items would have to be looked at). In some cases, the different manufacturers may have actually used the same Serial Number, although this is very rare, it can happen on Serial Numbers of a short length.

To correct this error, view both the Asset and the Transaction and both Serial Numbers. You will probably have to go to each asset, and view the Serial Numbers. Correct the data according to your findings, and save your changes.

62 - Negative Qty not allowed for a Move. Make positive, swap locations.

This error message is currently inactive. You should not receive this message.

63 - Not enough [Z] Assets in Asset table during Move.

This Transaction is moving a quantity of Z Assets from one location to another. The source location does not have enough Z Assets in the Asset table to cover the size of this move.

Note: This message will not appear during a normal validation of the Transaction table, but only during a Move.

64 - Date+Time+Catalog+Prior Location duplicated in another Transaction.

The current Transaction is a TAG done at a specific location and time of a specific Catalog. All of the information regarding the Date, Time, Catalog, and Prior Location are duplicated exactly in another Transaction.

To correct the error, look at both Transactions. More than likely, this information was uploaded more than once, and the correction can be made by using the Range Duplicates feature, and deleting the duplicate.

Note: This will only range exact duplicates, so if something has been changed in one of the items since the upload, that item will not be considered an exact duplicate.

65 - Date+Time+Catalog+Current Location duplicated in another Transaction.

The current Transaction is a TAG done at a specific location and time of a specific Catalog. All of the information regarding the Date, Time, Catalog, and Current Location are duplicated exactly in another Transaction.

To correct the error, look at both Transactions. More than likely, this information was uploaded more than once, and the correction can be made by using the Range Duplicates feature, and deleting the duplicate.

Note: This will only range exact duplicates, so if something has been changed in one of the items since the upload, that item will not be considered an exact duplicate.

The entire list of errors that Bar|Scan will print an error in the Transaction table for, can be viewed by going to the Main Menu, File, then Company . . . ▸, Housekeeping . . . ▸, Set Transaction Validation Messages.

Validate, print, mark the Transactions as printed, then from the Main Menu, select Transactions . . . ▸, Move . . . ▸, All. All Transactions that have no error messages will be transferred into the Asset table, with one exception; those with the "Hold" feature described in the next section.

66 - Quantity is Out of Range. Must be -9,999,999 through 9,999,999.

Bar|Scan will only accept 'Z' numbers (and quantities) with the range delineated above. This is because in most cases any number outside of this range is a data entry error. If you are really recording quantities in excess of these boundaries, you can disable the Error.

67 - More than one corresponding 'Z' asset in Asset Table. Run Table Integrity 'Correct Z Asset #s and Merge Duplicates'.

Bar|Scan allows only one 'Z' number per Catalog, Location and PO combination. There can be times, especially when an index has been corrupted, that two 'Z' numbers are created when only one is desired. Running the Table Integrity function mentioned in the message will properly combine the 'Z' numbers and their associated quantities to correct the problem.

68 - Data was truncated in 1 or more columns during import or handheld computer upload.

Bar|Scan allows you to change the length of many fields. Usually fields are lengthened to accommodate more information. If you shorten fields that are used in your Mobile Device, you should do so only after you have synchronized your Mobile Device and clear the data out of it. Otherwise your Mobile Device may contain information that will be truncated during the upload. In you loose critical data, lengthen the field again and import the Mobile Device data again from the Mobile Device backup file located in your Company Reader Folder on your PC.

69 - Comments may not be blank.

By default, Bar|Scan allows blank comments. This can be changed on the Accounting Tab of the Catalog Screen to make Comments a mandatory response. Mandatory comment responses are useful when collecting certain Catalog information. For example, you could Range all of your Printer Catalogs and force the operator to place information such as “networked” or “freestanding” in the comment field during an inventory. This means that the Catalog can control whether a comment response is required.

70 - Serial # length does not match those specified in the Catalog.

Similar to the Error 69 above, Bar|Scan allows you to create some additional rules based on the Catalog. Most manufacturers have serial numbers of a particular length on a particular model of equipment. By setting serial number rules, you can limit the number of incorrect scans. For example, certain laptop computers have multiple bar codes. Some of these bar codes are product number or service tags. By allowing only particular serial number lengths, you can usually identify when the wrong bar code such as a service tag was scanned in error.

71 - Asset number must consist of only numeric digits

By default, this Error message is set to “Disabled”. You can enable this validation so that all transactions must have numeric asset numbers.

72 - Tags require a Serial Number entry

By default, this Error message is set to “Disabled”. You can enable this validation so that all Tag transactions must have serial numbers.

73 - Take-Catalog Mismatch. Disabled= Overwrite .... Transaction Catalog

The complete message is "Take-Catalog Mismatch. Disabled=Overwrite Transaction with Asset Catalog. Warning/Op#1=Overwrite Asset with Transaction Catalog."

Transaction message #73 is a 4 state for TAKE's: it flags mismatches between the Transaction Catalog and the Asset Catalog. Default value is DISABLED, changing the Asset catalog (using the Transaction catalog).

Error(Enabled) -Move prevented, warning message issued, No change to Asset or Transaction catalogs.

Disabled -Move allowed. No warning message. Asset catalog changed (to Transaction catalog). Transaction catalog unchanged.

Warning -Move allowed. Warning message. Asset catalog changed (to Transaction catalog). Transaction catalog unchanged.

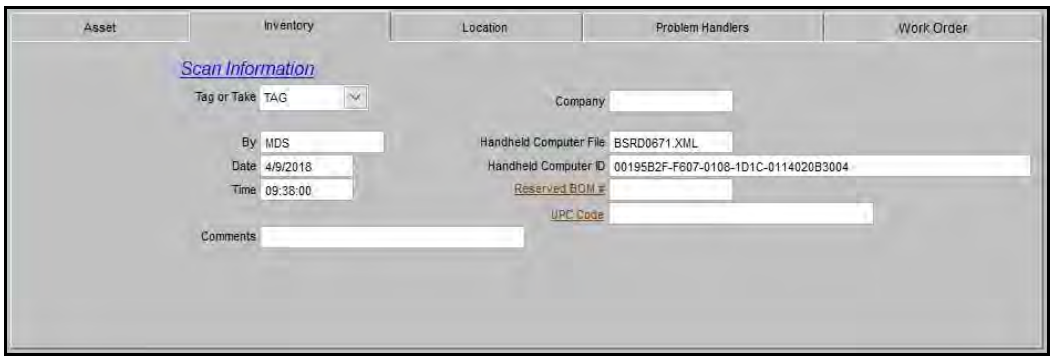
OP#1 -Move allowed. No warning message. Transaction catalog changed (to Asset catalog). Asset catalog unchanged.

Note that THE DIFFERENCE IS THAT THE FUNCTION OF 'DISABLED' AND 'OP#1' HAVE BEEN SWITCHED. The old default (i.e. message was DISABLED) was to overwrite the Transaction catalog with the Asset catalog. The NEW default (no change in the default setting, it is still DISABLED) overwrites the Asset catalog with the Transaction catalog.

By default, this Error message is set to "Disabled". This means that on a TAKE inventory, the Catalog Number (XX9999) is obtained from the corresponding asset in the Asset Table. You can enable this validation if you wish to do a TAKE and prompt for Catalog. The Catalog Number collected in the Mobile Device then has priority. You would perform this type of inventory if you did not have confidence in the existing Catalog Numbers being previously collected for your Assets or you wish to change the Catalogs, for example to either add or remove Catalog detail.

74 - Reserved Bill of Materials not found

The Mobile Device has collected and uploaded a Reserved Bill of Material Number that does not exist in the Reserved Bill of Materials Table. See the indicated location for this field in the example below.



This error can occur because of a typo or the Reserved Bill of Material Number existed but was deleted in the Table.

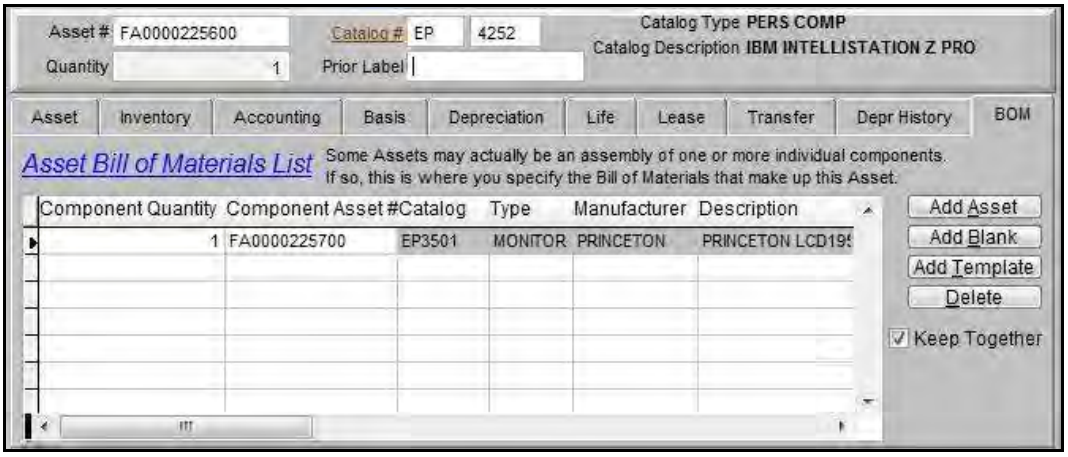
75 - Reserved Bill of Materials complete. Once completed, no .... added.

The complete message is “Reserved Bill of Materials complete. Once completed, no more items may be added.”

The Mobile Device has collected and uploaded more items than specified for a Reserved Bill of Material Number.

76 - Assets currently reserved by a different Bill of Materials Reservation

The current transaction specifies a "Reserved BOM#". However, the specified number is not the Bill of Material actually reserving this asset, it is another.



77 - Both Reserved .... Work Order does not use this Reserved Bill of Materials

The complete message is "Both Reserved Bill of Materials # and Work Order # specified, but Work Order does not use this Reserved Bill of Materials #"

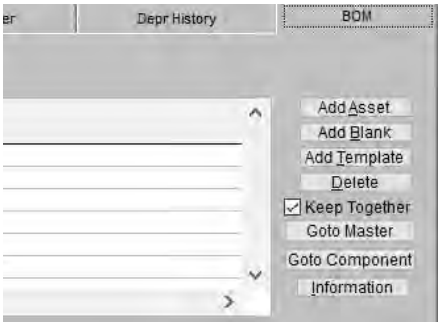
By default, this Error message is set to "Disabled". You can enable this validation so that all Tag transactions must have serial numbers.

78 - Unable to reserve Asset

The current transaction specifies a Reserved BOM# that exists, but that BOM does not yet have this asset in its list. An attempt was made to add it to the list during the move from the Transaction table to the Asset table, but for some unknown reason it was not successful.

79 - This asset is a component ... it must be in the same location as its parent

You can specify whether or not you would like the components to be in the same location as their parents. This is specified on the Asset's Bill of Material Tab by check marking 'Keep Together' as shown below.



If a component is then inventoried by a handheld and found in a different location than the parent asset, you will receive this error.

In a warehouse, this might not be the case and you might consider changing this message to either a Warning or Disable the message. Your selection is dependent on your situation.

80 - This asset is a component ... It's master asset must be in the Transaction Table also

The complete message is "This asset is a component asset. It's master asset must be in the Transaction Table also.

81- Aux Z field value mismatch. TAG asset in Transaction Table uses a different set of AUX Z field values.

You determine which combination of fields will make a Z number. This is done on the Company Settings Screen on the Qty Assets Tab. This error means that existing quantity items do not have the same combination of fields that were just used. The most common reason for this is that the fields were changed on the Company Settings Screen on the Qty Assets Tab. There are several different ways to correct this issue. It would be best to obtain further guidance from your Bar|Scan Dealer before proceeding.

82- Different AUX Z field values already in use by this Asset.

You determine which combination of fields will make a Z number. This is done on the Company Settings Screen on the Qty Assets Tab. This error means that existing quantity items do not have the same combination of fields that were just used. The most common reason for this is that the fields were changed on the Company Settings Screen on the Qty Assets Tab. There are several different ways to correct this issue. It would be best to obtain further guidance from your Bar|Scan Dealer before proceeding.

83- Prior Organization not allowed in a 'TAG'.

For inventories that require an Asset Number. Bar|Scan does not allow you to collect historical information such as Prior Organization, Prior Location, Name etcetera. Quantity inventories do allow Prior Location and Prior Organization.

84- Org Code Blank, Prior is not blank. Not allowed.

You cannot enter a Prior Organization Code and leave the Current Organization Code blank. In any case, only Quantity inventories allow you to enter a Prior Organization Code.

85- Unknown Prior Org Code.

This happens when the Prior Organization Code that was entered into the Mobile Device or the desktop computer does not match any of the Organization Codes that exist in the Organization Table.

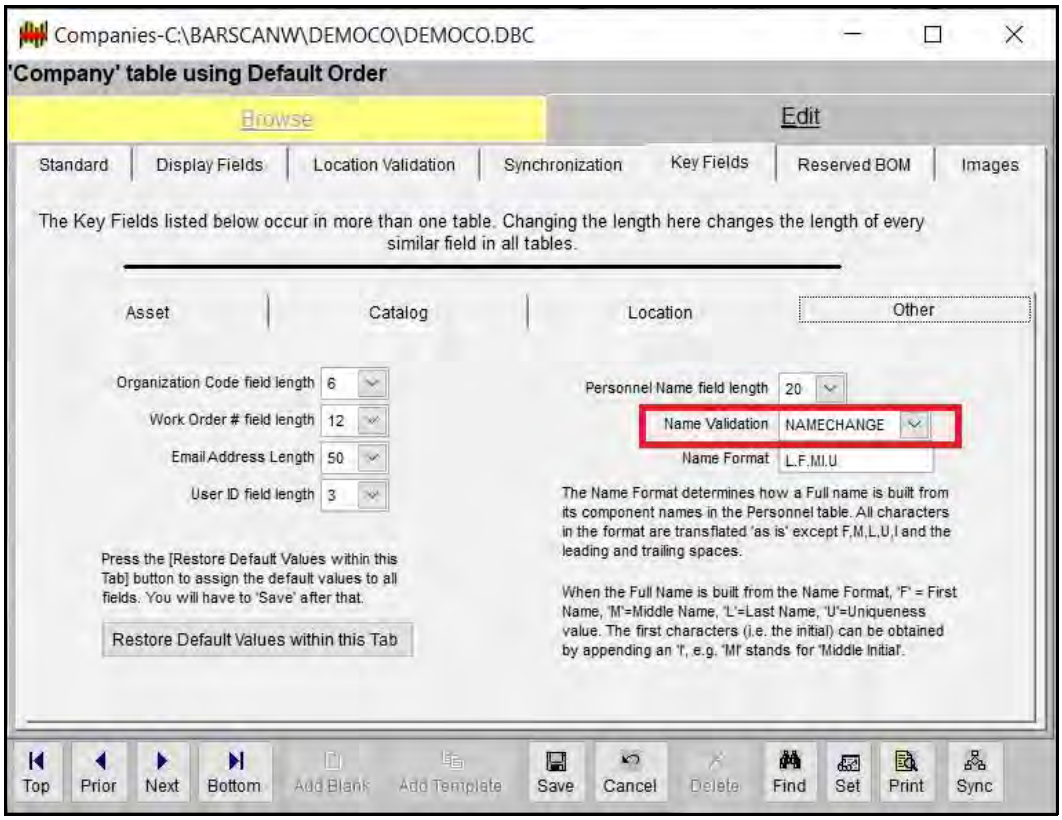
Both of the Organization codes need to be examined. If the one in the Transaction file is correct, it needs to be added to the Organization table. If the one in the Transaction table is incorrect, then it needs to be changed to the correct one already existing in the Organization table.

86- Prior Location not allowed in a 'TAG'

You cannot enter a Prior Location in TAG Mode under any scenario. Bar|Scan does not allow you to collect historical information such as Prior Location for any Asset or Quantity that you are just entering for the first time.

87- Name not in Personnel table.

The Name that was entered does not match any Names in the Personnel Table. You must change the name to match. You can right click and then select a name from the list or type the correct Name. If you prefer not to validate Names against the Personnel Table, you can select NONE as the Name Validation in the Company Settings Screen as shown below.



88- One or more target Asset fields is shorter or has fewer decimals than the source Transaction field. Data may be lost during move.

Using the User Defined Fields Module, you can modify existing Bar|Scan fields by stretching or shrinking their length as well as changing their formatting by using an input mask. For example, you can create a field in the Transaction Table called Freight and have the data in this field move to the existing standard Bar|Scan Freight field in the Asset Table. The default length for Freight in the Asset Table is 16,2 (sixteen with two decimal places). If you create a field in the Transaction Table that is longer then there is a possibility of data being lost when moved from the Transaction to the Asset Table.

If you receive the message then you will need to examine all UDF's on both the Asset and Transaction screens (including those that you have decided to hide) and to visually compare them to verify that they are the same length and decimal length. Bar|Scan doesn't mind if something shorter moves into something longer (e.g. a Transaction field sized as 99.99 moving into an Asset field sized as 999.999 is ok), but otherwise all fields must match. This should also include retargeted Transaction fields, where a UDF moves into a different field. (In this case, whether the field is retargeted or not, the Asset and Transaction characteristics of the UDF still have to match.)

Finally, there are three tables that are being compared, the Asset, Location History and Transaction Table, so you will need to perform a Table Integrity after making your adjustments.

89- Prior Name not found in Personnel Table

If you receive the message, this is a validation error for the Asset Table's Location History. Enabling this as an 'error' will check not only the current name in the current location in the asset table, but also the prior name in the prior location in the location history whenever the Location History is saved. In summary, if this is set as an error it will check the name in both the current and prior location. If it is not set as an error, it will only check the current location.

90- Asset received date before purchase date

If you receive the message, then your Receive Date is older than your Purchase Date for this Transaction. Typically, assets cannot be received prior to being purchased.

91- Purchase Order # does not match Purchase Order # in related Work Order

If you receive the message, then the Purchase Order collected in the handheld is different that the Purchase Order already entered for this Asset. You will need to verify which one of the two Purchase Orders are correct and change the other to match.

92- Xml in Extra Field has a problem or MSXML 4.0 SP1 or later not installed

If you receive the message then the data collected in the handheld device may include fields which do not exist in the Transaction table. To hold this data it is stored in XML format in the TR_XTRA field. To retrieve this data, whether for validation or to move it to its appropriate table and field, there are two basic requirements:

(1) Bar|Scan' s internal XMLAdapter class must be available. This class requires MSXML 4.0 or later be installed on the workstation. This is normally installed with the Bar|Scan Workstation installer.
(2) The data must be well formed. There are a variety of factors that contribute to XML being well formed (See http://en.wikipedia.org/wiki/XML). A violation of any will cause an error. Some of these are:

a. The document contains only properly encoded legal Unicode characters

b. None of the special syntax characters such as < and & appear except when performing their markup-delineation roles
c. The begin, end, and empty-element tags that delimit the elements are correctly nested, with none missing and none overlapping
d. The element tags are case-sensitive; the beginning and end tags must match exactly.
e. Tag names cannot contain any of the characters !"#$%&'()*+,/;<=>?@[\]^`{|}~, nor a space character, and cannot start with -, ., or a numeric digit.
f. A single "root" element contains all the other elements.

The most likely causes of this error are (1) MSXML 4 was removed or not installed or (2) the data is not well formed because either some of it is missing due to a problem during transmission from the handheld or because it was inadvertently edited by the user.

93- Work Order Line Item not found

This error occurs when a work order line item specified in the transaction table was not found. This will occur when a work order line item has been sent for editing to the handheld but has been deleted within Bar|Scan after being sent to the handheld device. When the data is returned marked as edited, it cannot find the original Work Order line item.

94- Work Order Line Item already exists

This error is the converse of # 93. The handheld device has added a new line item to a work order, but someone else has already created such a line item within Bar|Scan after the Work Order was sent to the handheld.

95- Work Order already exists

The handheld device has created a new Work Order, but someone else has already created a work order with the same number before it was moved from the handheld to Bar|Scan.

96- Missing Asset #

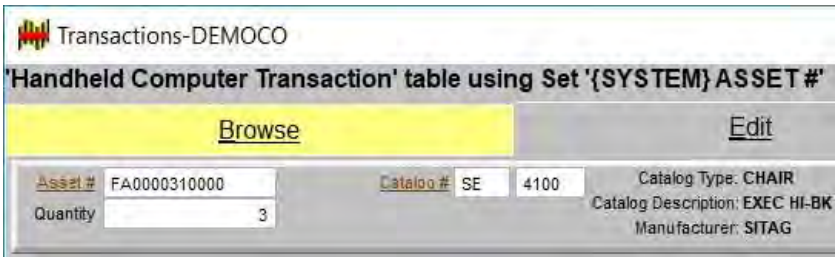
This error occurs when the TAG or TAKE process is a service order operation ("SERVICE") rather than a TAG or a TAKE and no Asset number has been specified. Asset numbers are required.

97- Invalid Move Action

This error occurs when the TAG or TAKE process is a service order operation ("SERVICE") rather than a TAG or a TAKE and the "Service Move Action" field (TR_MVACT) does not have a valid value. It must be either "A" (add),"C" (change), or "D" (delete).

98- Non-z asset quantity must be 1

This error occurs when the Quantity field (below the asset# field) has any quantity entered other than the number 1. Assets are not allowed to have multiple quantities. Only quantity inventories (Z numbers) will allow multiple quantities.



98- No Asset in Asset table and Transaction TAG asset has problems.

This error occurs when the current transaction is a TAKE. However, there is no corresponding asset with the same Asset number in the Asset table. There is, however, a corresponding TAG in the Transaction table, but it has problems. This prevents an attempt to move this valid TAKE to the Asset table until the TAG can be corrected and moved first. Correct the TAG and revalidate.

VALIDATING AN ASSET

You may use the Validate icon on the Transaction table toolbar to Validate all of your Transactions, or in conjunction with a Range (F4) of assets.

PRINT TRANSACTION FILE

This feature provides important aspects of the process of preparing the Transactions for their move into the Asset table.

- ✓ By default, all assets must be printed before they are permitted to be transferred into the Asset table. This report is used as an *audit trail*. This feature can be disabled in the Company Settings Table.

- ✓ Second, each asset record may be printed, sorted by location or other pertinent information for auditing your work.

- ✓ Third, you can produce reports containing groups of assets with problems so they can be handled and corrected more efficiently.

After asset record information is transferred from the Mobile Device into the Bar|Scan Transaction table, it must stay there until it is correct and validated for accuracy, and printed. You may end up printing some of your Transactions several times, on different reports.

When asset records are first transferred from the Mobile Device, you will want to print (and validate) a list of all asset records for review. You will also want to print a complete list of asset records containing problems.

After asset records have been validated and a report containing the validated assets has been printed, you may use the Move Selected Transaction Data to The Asset table icon to transfer the new asset information into the Bar|Scan system. All of the Transactions will be moved if none of them are selected (Ranged).

USEFUL TYPES OF REPORTS

Correcting and validating the Transaction table is in many ways more common sense than a scientific method. Obviously, familiarity with the assets is an important factor. There are three basic types of Transaction Reports that are needed to correct most types of errors as follows:

All Transactions ordered by Location (for auditing) - useful to carry around post-inventory to correct errors that require a revisit of the asset. This is the most commonly used report.

All Transactions ordered by Asset Number - useful to correct duplicate asset scans since each duplicate asset numbers are printed one after the other.

All Transactions ordered by Inventory Initials, Inventory Date, Inventory Time - useful for most other types of corrections since the order matches the order in which the inventory was performed. Reviewing assets in this order, shows exactly the order in which the inventory crew scanned the assets.

Report filters are very useful when printing reports. To define or change a filter, go to the Report table, and select the report, then the Edit tab. You may then add or change the filter on the filter tab.

PRINTING THE REPORT

When you want to print the Transactions, simply go to the Main Menu, select File, then Open . . . ▸, Reports . . . ▸, then Bar Code Transaction (or All). On the Browse panel, select the Report that you would like to print. Or, if you have the Reports toolbar on your Main Menu, you may click on the Bar Code Transaction Report icon that is shown below.

You can also print by clicking on the print icon on the Transaction Table toolbar, or right-click the print button to select or change the desired report to print as shown below.

Bar|Scan provides a choice of several different System Reports. The first of these reports lists all the Transactions by asset number. The second report lists all Transactions by Inventory Initials, Inventory Date, and Inventory time. The third report lists only asset records with problems.

The last report lists only asset records which have no problems. Whenever you intend to transfer asset records from the Transaction table to the Asset table, it is recommended you run this report.

You can always make your own reports in addition to the ones listed as system reports.

You may have additional reports in the selection window. These are reports that were created using Bar|Scan as described in *Chapter 10 - Report Table.*

MOVE SELECTED TRANSACTIONS TO THE ASSET TABLE

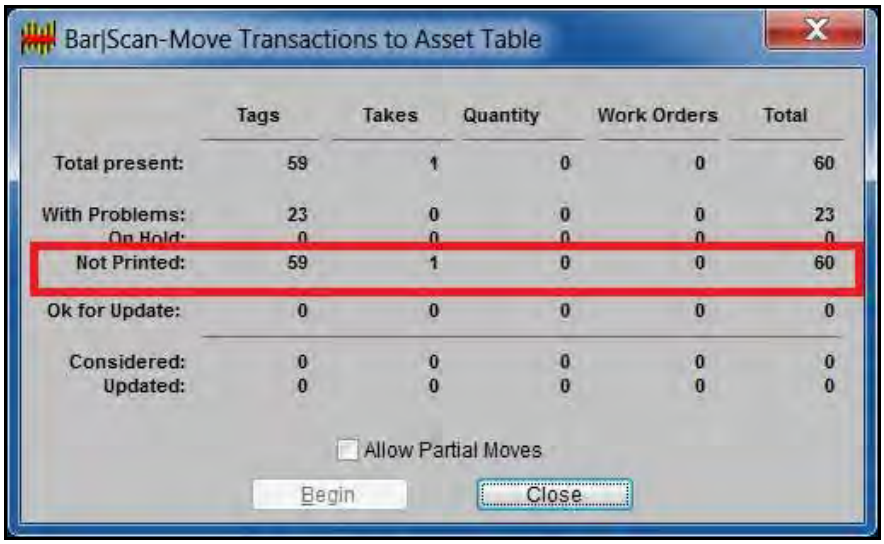
This feature actually transfers the good asset records from the Transaction table into the Bar|Scan Asset table. When the move is complete, the asset records which have been transferred will be removed from the Transaction table.

You may select this feature by using the Main Menu Transaction pull down, and select Move, All or Selected, or you may use the Move Selected Transactions to the Asset table icon on the tool bar.

Once this process is completed, and further changes or corrections are required, you will have to access the Bar|Scan Asset table.

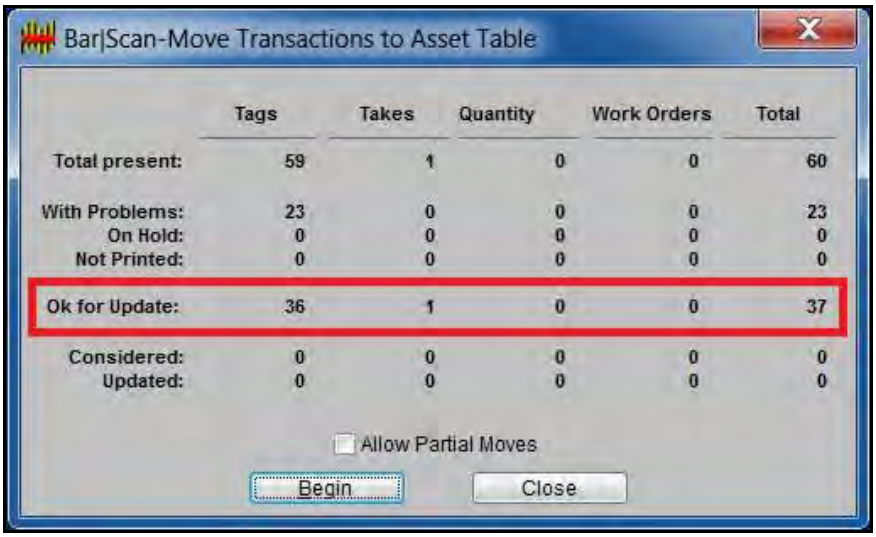
Just prior to selecting this feature, we recommend you print a complete list of Transactions which you will transfer.

When you select Move Transactions to the Asset table, whether selected or all, you will see a dialog box similar to the one below.



As shown above, you may see that none of the transactions have been printed. Bar|Scan *may require* that you validate and print the transactions before they can be moved. This requirement can be turned off on the Company Settings Panel.

Once you have validated and printed the transactions, any of those that have no errors that Bar|Scan detects, and any that are not on hold, will be available to move to the Asset table, as shown below.



Bar|Scan does additional testing of data when the transactions are being moved to the Asset table. Data is checked in both the items that are being moved, as well as their counter parts that are already in the Asset table. To move the transactions that are Ok for Update, select Begin. If you are not ready to move the transactions, select Close.

If you do not wish to print a Transaction Report prior to a move, this feature can be unchecked in the Company Settings screen.

If you encounter errors during a Move, the entire Move will be cancelled, and the changes to the items will "roll back" to the way they were before the change. If the error was on the Transaction rather than the Asset, check the Problem Handlers tab on the item(s) where problems were found before you validate.

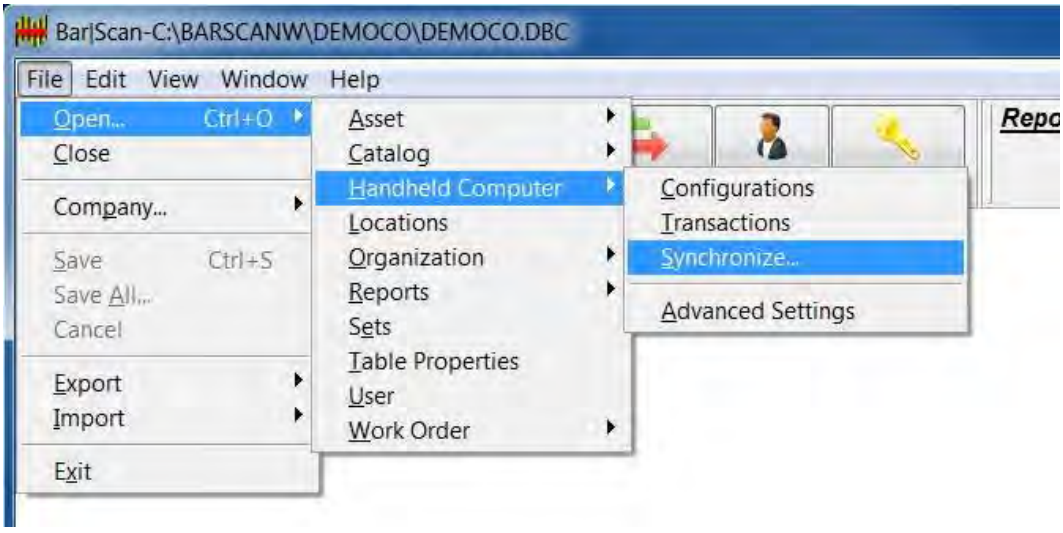
If errors are found during a Move, or if you think you might have errors that will affect your Move, select the check box next to "Allow Partial Moves" shown above. If this item is checked, the move will go a lot slower. But, if there is an error found, all of the Move will take place except for the item(s) with error(s). Then, you can investigate the error(s) and correct the data. Once corrected, validated, and printed, you can Move the remaining transactions to the Asset table.

USB SYNCHRONIZATION

This section provides the instructions for transferring the asset information from the Mobile Device to the Bar|Scan **Transaction Table**.

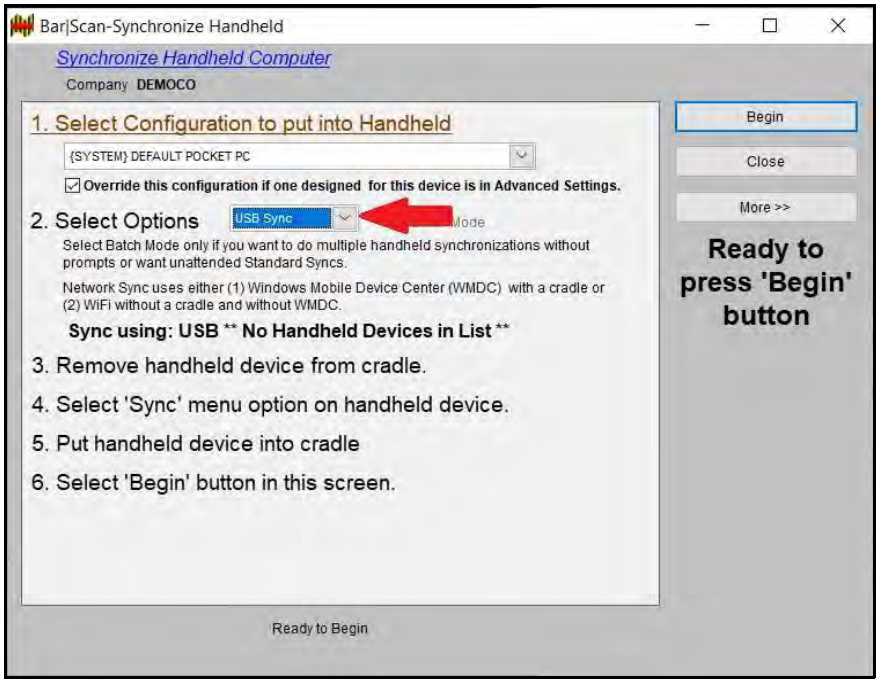
You will also want to review the chapter on the Mobile Device for instructions on the proper set-up of the Mobile Device. Some of those instructions will be repeated in this section for your convenience.

From the Main Menu, select File, then Open . . . ▸, Handheld Computer. . . ▸, then Synchronize as shown in the example below.



Or, if you have the Import toolbar selected on your Main Menu, you can simply click on the Sync Handheld icon which is shown below.

When you select File . . . ▸, then Open . . . ▸, Handheld Computer. . . ▸, then Upload, you will be shown the following dialog box.



Note: You can also reach the above window by going to the Main Menu, then selecting File . . . ▸, Import . . . ▸, Handheld Computer. . . ▸, Synch.

PREPARING FOR USE WITH THE USB CABLE

Make sure the USB cable is plugged into the computer, and plug the other end of the cable into the Mobile Device Cradle.

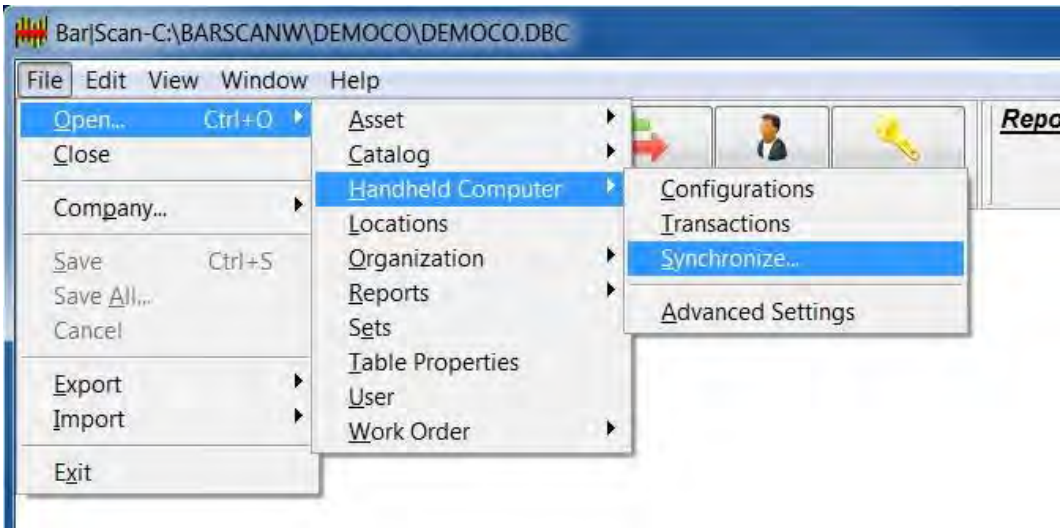
You should **always** begin the synchronization process on the computer before beginning the process on the Mobile Device.

You may need to use the down arrow to the right of the User Configuration box to select the correct Configuration, as shown above. Select *{System} Default Pocket PC Connection* if you have not yet created your own Configuration.

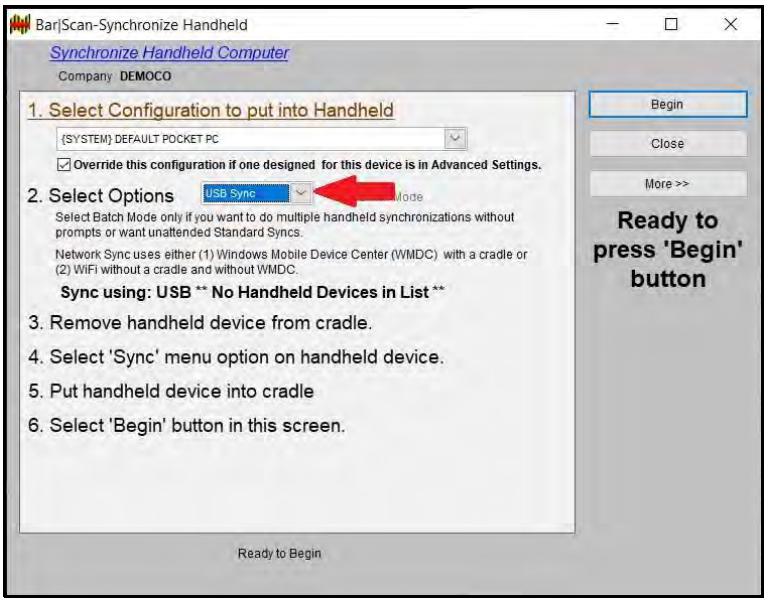
When you are ready to synchronize, you should set the Mobile Device into the cradle, ensuring that the cradle's cable is connected to the USB port on your computer. On the Mobile Device, go to the Bar|Scan Main Menu.

You should initiate the synchronize from the computer by clicking on the Synch Handheld icon on the Bar|Scan Main Menu as illustrated below.

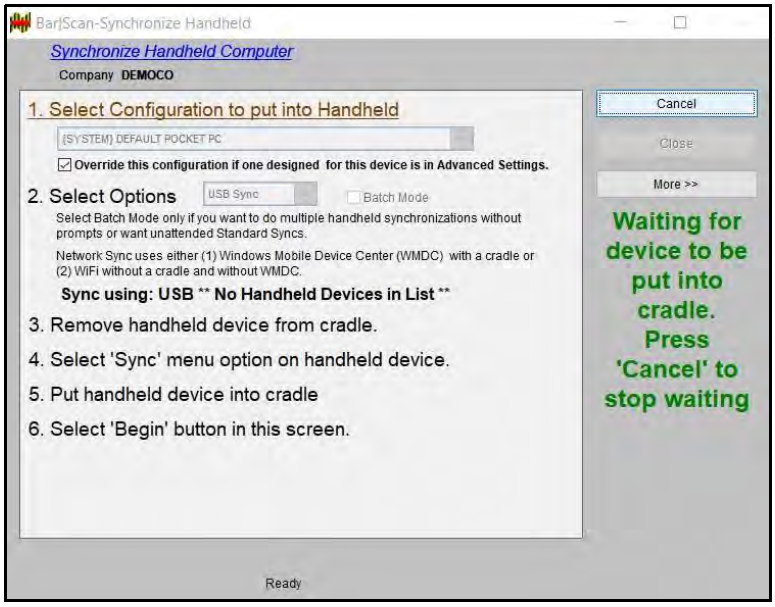
Or select File, then Open . . . ▸, Handheld Computer. . . ▸, then Synchronize as shown in the example below.



Select either of the two methods and you should be shown the dialog box below.

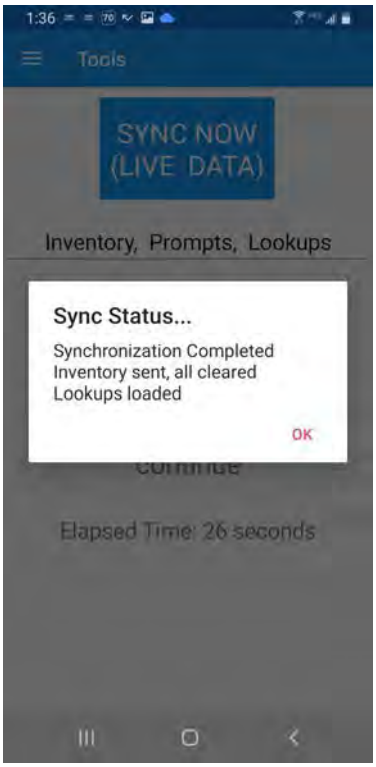


Select the Use Configuration field, and select the **{SYSTEM}-DEFAULT POCKET PC** Connection as shown above. Then, click on the Begin button. The words "Ready to Begin" that are shown on the dialog box below will change to say "Waiting for Connection," and then the TCP address will display as in the example below.



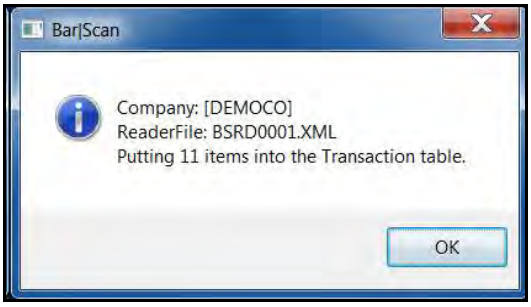
Once the words Waiting for Connection appear, tap on the Tools then Synch Menu on the Handheld's Bar|Scan Main Menu.

Bar|Scan will perform all bi-directional communication necessary. When completed, you will be shown a dialog box on the Mobile Device that looks similar to the one below.



As you can see from the following message, Bar|Scan verifies that the data went into your Transaction table.

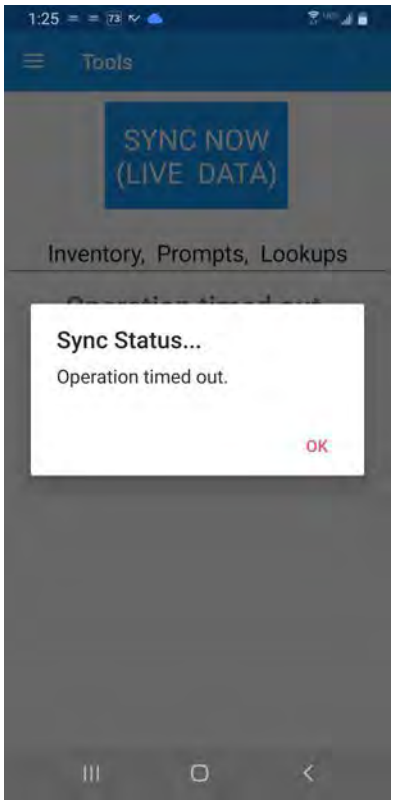
The Bar|Scan message below can serve as your confirmation. The number of items will vary according to your inventory.



Then, tap on the Yes button only if you want to erase all of your information. Tap on the No button to be returned to the Main Menu.

The computer will remain ready for another upload. If you do not wish to upload another Mobile Device, click on the Cancel button to cancel the impending upload, and then click on the Close button to close the upload dialog box.

If you remove the handheld or USB Cable during the synchronization, you might see the following message on the handheld.



An error message similar to the above will be displayed if there is a problem synchronizing the Mobile Device to the desktop's Bar|Scan database.

This error message will be displayed if something interrupts the transfer of data from handheld to PC, for example a disk write fail or an anti-virus scan and the data file is not completely transferred from the handheld to the PC.

Try synchronizing the handheld to the Bar|Scan database again. If the message reappears, contact Bar|Scan or your Dealer for support.

Special Notes on Handheld Synchronization

Introduction

&& Synchronizing Bar|Scan data on your handheld with Bar|Scan on your desktop is integral to getting the full functionality out of your Bar|Scan system. However, synchronization may at times be confusing. This can be because Bar|Scan supports two different methods of transferring data between the handheld and your workstation. The first method is called 'Network Sync'. The second is called 'USB Sync'.

How to Choose

We recommend that you perform your synchronization using 'Network Sync'. This is the default and requires no customization on the desktop or the handheld.

It's advantages are:

The advantages to 'Network Sync' are:

1. This method is supported across all Bar|Scan handheld models.

2. If you have more than one handheld model there is no need to reconfigure the sync every time a different handheld model is cradled.

3. It establishes a direct Tcp/Ip network connection between the handheld and the Bar|Scan workstation or server receiving the inventory data. The handheld can sync with any computer accessible over the network, not just the computer it is physically attached to.

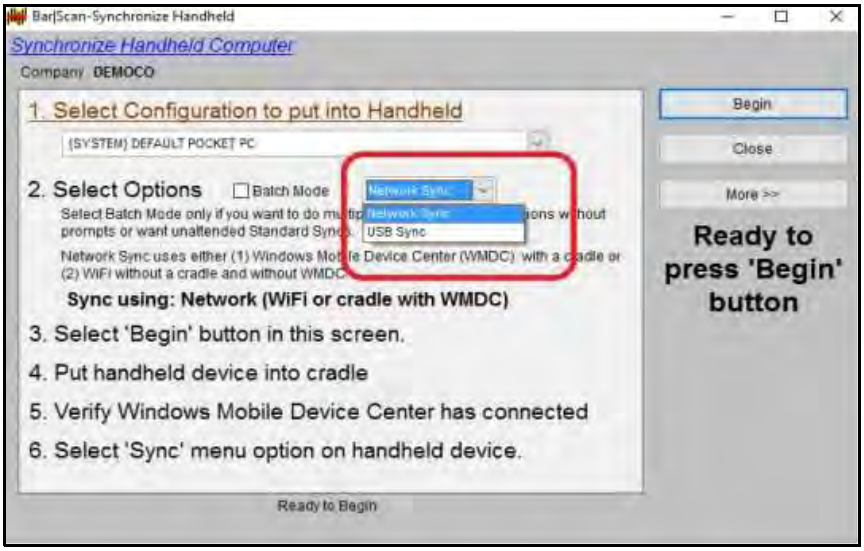
4. It is the quickest and most reliable method of data transfer with a lower chance of needing retransmission of data.

It's drawbacks are:

1. It requires Microsoft's Windows Mobile Device Center (WMDC) software to be installed on the workstation. At times, this can be difficult to install due to security or remote access restrictions at your organization. In addition, 'USB Sync' can only be used if a very specific set of circumstances are true. The requirements are:

a. You must be using a recent Zebra MC3200 or MC55 series handheld with a recent version of Bar|Scan installed. This is the only series that supports 'USB Sync'. We may support others in the future.

2. Your session of Bar|Scan running on your network workstation must be allowed to show you with the option of using 'USB Sync'. If you do not see the drop down box with 'Network Sync' and 'USB Sync' options then you do not have the 'USB Sync' option available from your workstation. This option will normally display as follows:



If you meet the above requirement then you can consider using 'USB Sync' if you find yourself facing one of these situations:

a. Your company firewall is preventing communications with the handheld.

b. You are using a Remote Desktop application to access Bar|Scan on the PC and there is no way to network into the server hosting Bar|Scan.

c. Your company policy does not allow desktop customization (i.e. you can't install WMDC installed on your desktop).

d. Any other reason the WMDC cannot be installed on the workstation.

'USB Sync' is supported by the MC3200 and MC55 handheld series. The handheld can only transfer data to the computer to which it is physically attached. It requires a setup on both the handheld and on the PC, since USB is not the default Sync mode. It does not require that WMDC be installed on the Workstation. However, your computer security settings must be configured to allow the attachment of USB devices.

There are many Tips available that describe various aspects of the Synchronization process using Tcp/Ip i.e., 'Network Sync'.

If you need TCP/IP Synchronization without WMDC

All supported Bar|Scan handhelds support a Sync with Tcp/Ip using a connection into the local network. The method of creating such a link is using the Windows Mobile Device Center (WMDC) software from Microsoft. However, that is not the only way a handheld can be connected into your network. There are other ways, but they are unsupported by Bar|Scan, Inc. However, you are free to use these unsupported methods. For example:

1. If the handheld supports Wi-Fi, then a Wi-fi connection can be created to the local network. Once the connection is configured and made, then the Bar|Scan program on the handheld can communicate over Tcp/Ip with Bar|Scan on the PC.
2. There is hardware both from Zebra and third parties that assists in making a connection into the local network. In general, drivers and software may have to be installed on the handheld in addition to configuring your handheld for your network. For example:

a. If you already have a handheld and cradle, there are "USB to Ethernet" adapters available from third parties. Installation of a driver on the handheld and network setup on the handheld are required. For example, PortSmith Technologies has a 'dataPort' adapter:
http://www.portsmith.com/product/daptaport that allows some handhelds to connect through its cradle into your network.

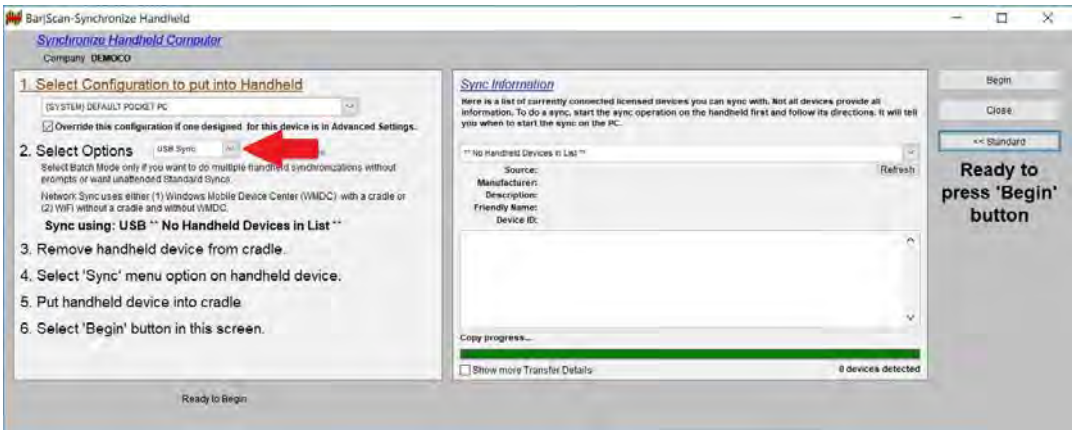
b. You can purchase an Ethernet ready cradle. These are offered by Zebra, but the smallest contains four (4) slots for four handhelds. If you need a cradle with only one handheld slot, PortSmith Technologies has single handheld Ethernet cradles that are compatible with the MC55:
http://www.portsmith.com/product/motorola-mc67mc65mc55-ethernet and the MC3200 http://www.portsmith.com/product/motorola-mc3100mc3000-ethernet.
Also check their website for your specific handheld.

If you decide on using the 'USB Sync' method

Only the MC3200 and MC55 handheld supports the USB method of synchronization as of this publication date. There are specific setup requirements on both Bar|Scan running on the PC (see above) and on the Handheld. However, once these have been satisfied, a Sync can be performed between the handheld and Bar|Scan on the PC, but without WMDC. This synchronization method essentially causes the handheld to look and act like a removable USB drive. To use 'USB Sync' you must configure both the handheld and Bar|Scan on the PC.

USB Sync, PC configuration

Configuring the PC to use the 'USB Sync' is simple. Select the 'USB Sync' option in the 'Synchronize Handheld' screen BEFORE starting the sync operation with the 'Begin' button. Here you can see what a sample screen looks like. It has had the 'More…' button selected to display all of the 'USB Sync' screen. Note that the screen differs in both appearance and instructions from the 'Network Sync' screen. Also note the steps listed to perform the 'USB Sync' below.



USB Sync, Handheld Configuration

Configuring your handheld for 'USB Sync' requires configuration in both the operating system on the handheld and within the Bar|Scan application. First configure the handheld operating system, then configure the Bar|Scan application.

Configuring your Handheld Operating System

To configure your handheld for USB synchronization, perform the following steps:

1. Select the 'Start' or 'Home' icon on your handheld.
2. Select 'Settings' (This will be either an icon or a menu item).

3. Select 'System' on Windows Mobile 6x handheld, 'Control Panel' on Windows Mobile 5.x handheld.

4. Select the ‘UsbConfig’ icon.

5. Select the ‘USB Port Mode’ tab. Within this tab select ‘USB OTG Mode’. This is the default. This should also be the value for both USB and Tcp/Ip network mode. This setting will allow automatic switching between host and client mode.

6.Select the ‘USB Client’ tab. Within this tab select ‘Mass Storage’, then select ‘Platform’.

This concludes special notes. For more information contact us at techsupport@barscan.com

HOUSEKEEPING

INTRODUCTION

The following section contains information about features that don't fall into any other category. Some of the selections are used for setup and will usually only be selected once, for example “Settings.” Other selections are used occasionally, for example “Miscellaneous”

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

When you wish to select Housekeeping, go to the Main Menu. Select File . . . ▸, then Company . . . ▸, then Housekeeping as shown on the following example.

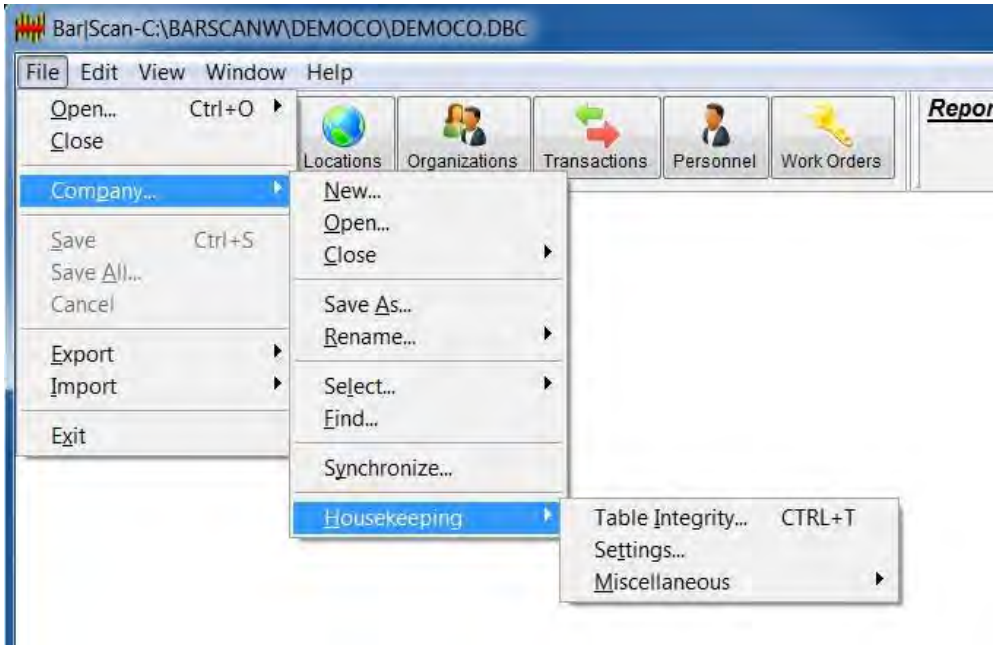


TABLE INTEGRITY

The first of the items in the Housekeeping drop down menu is Table Integrity. When you select this item, you will be shown a window similar to the one below.

You will see one or more Company Databases that are open and three buttons at the bottom of the window. Table Integrity is very important, as it maintains the file structure for all of your information in Bar|Scan.

Warning: Many items on the Table Integrity panel require that no other users are currently using the company that you select. In other words, no one else can be logged into that company. If you have a single company version, make sure that no one else has Bar|Scan open.

Also, if you are upgrading to a new version of Bar|Scan, you must be a Bar|Scan administrator (master user) to complete the Table Integrity.

Normally, you click on the Ok button and allow Bar|Scan to perform the Table Integrity. You will see a screen such as below.

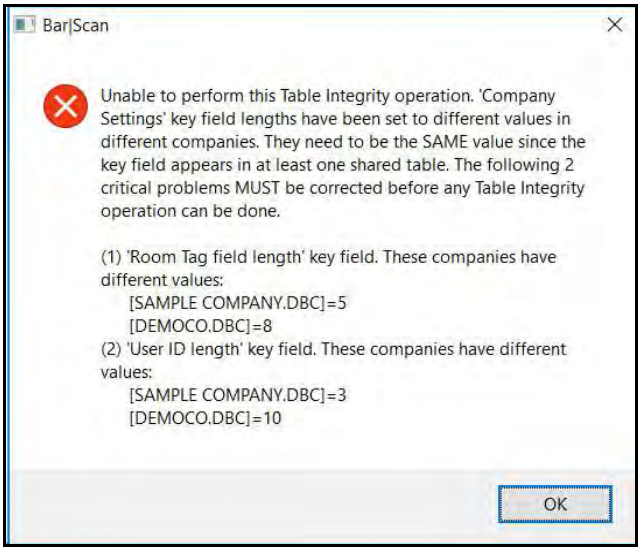
This process may take from several minutes to several hours depending on the size of your Company database, which modules you are using and the memory and speed of your computer.

When completed, you will see a dialog box similar to the one below.

And that is all there is to the process.

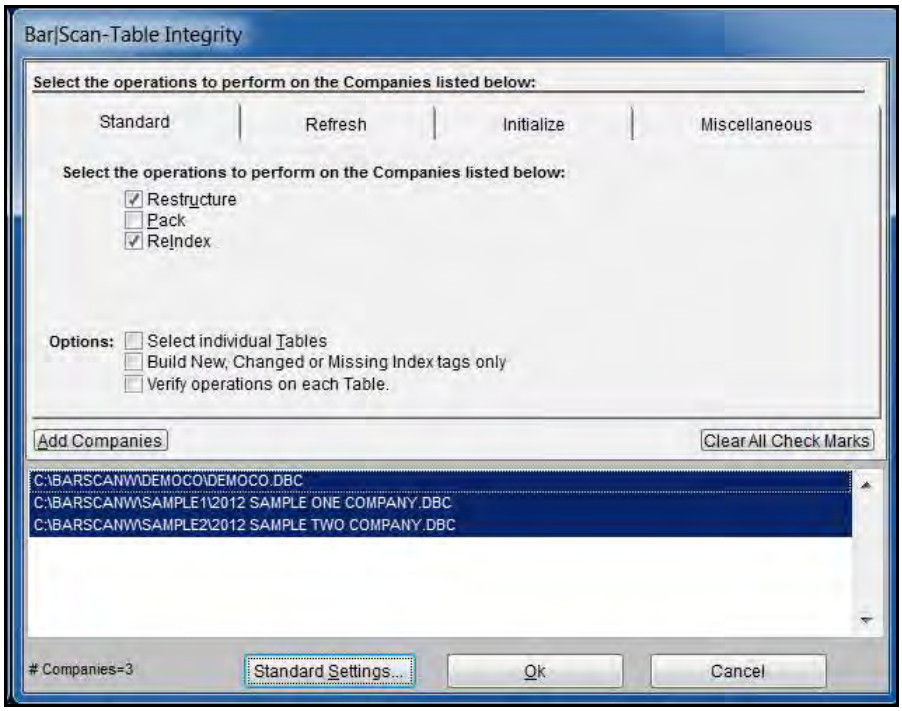
If you receive any unusual messages similar to that below, it generally indicates that there may be a shared table that has conflicting field information.

For example, if the Location Table is set to shared (Table Properties Screen) but in each company, the Room Tag length is set to a different length, then an error message similar to that below will appear. Correct the discrepancy and then perform the Table Integrity again.



If you are asked by your Bar|Scan Dealer to perform a more advanced version of Table Integrity, click on the Advanced Settings Button.

When you click on the Advanced Settings Button, you will see a screen similar to the one below.



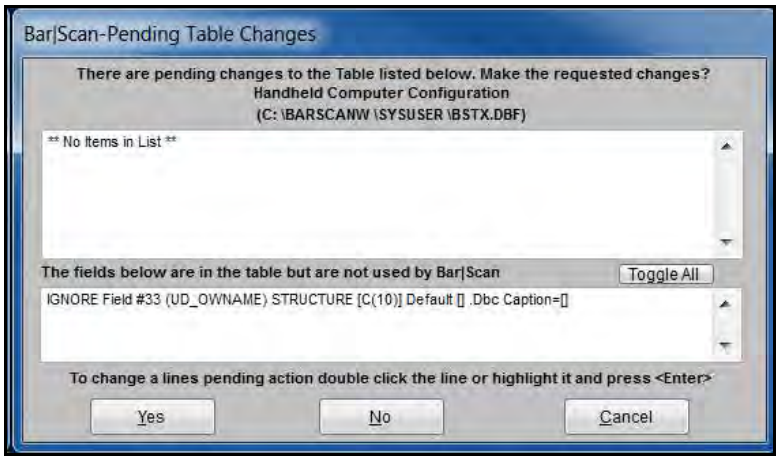
Restructure

When you receive a new version of the Bar|Scan program, it may be necessary to perform a Restructure in order to update your database files to the new version.

In a much rarer occasion, you may also want to use this item periodically to check the files. Normally this would only be done if you feel that the computer may have experienced a hardware problem.

Warning: Do not select this feature if your free disk space is less than two times the space of your Bar|Scan company folder. The Bar|Scan company folder is in the directory created by you. In any case, if you perform a Restructure with insufficient disk space, you may not be warned ahead of time that you do not have enough disk space to complete the process, rather you will get an error message indicating **Insufficient Disk Space**. See *Appendix A - In Case of Trouble* for more information on error messages.

If you select Verify operations on each Table, you will be able to view any changes that Bar|Scan finds and wishes to make, and accept or reject the change(s). Normally, you will always want to accept the change(s). Below is an example.



When you select the ok, the restructure window will close and you will be shown an additional dialog box that looks similar to the one below.

Pack

On rare occasions you will want to select this feature to condense the data files. When you delete something, Bar|Scan removes the visible copy, but holds a ghost copy which it marks for later removal, rather than physically removing it at that time. This feature physically removes the ghost copies that are marked for deletion.

We recommend that you perform a Pack at least once every year, more often if your assets are constantly moving.

On occasion, Bar|Scan might also suggest that you perform a Pack as in the example below:

While not mandatory, you will continue to see the message until you perform the Pack operation.

Important: Do not Pack if you are experiencing any Bar|Scan errors or error messages of any kind. Contact your Bar|Scan Dealer for support. This is because Pack creates new database files and compound indices every time it is used.

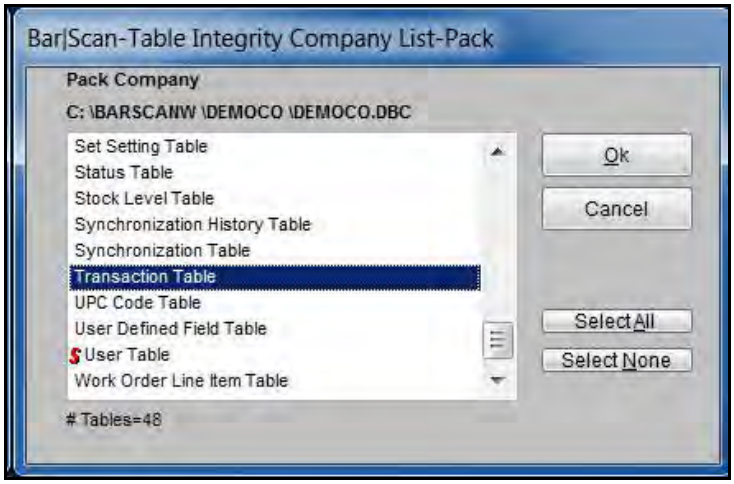
When you select Pack, you will see a dialog similar to the one below:

Warning: Do not select this feature if your free disk space is less than two times the space of your Bar|Scan company folder. The Bar|Scan company folder is in the directory created by you. In any case, if you perform a Pack with insufficient disk space, you may not be warned ahead of time that you do not have enough disk space to complete the process, rather you will get an error message indicating **Insufficient Disk Space**. See *Appendix A - In Case of Trouble* for more information on error messages.

If you allow Bar|Scan to Select All the tables, which all are selected (or highlighted) when you select this feature, Bar|Scan will pack all of your files without stopping.

Hint: If you have a small number of assets, less than 20,000, it is most convenient to Select All the tables for packing. Also leave all tables highlighted if you are not familiar enough with Bar|Scan file groups to determine which tables need to be packed.

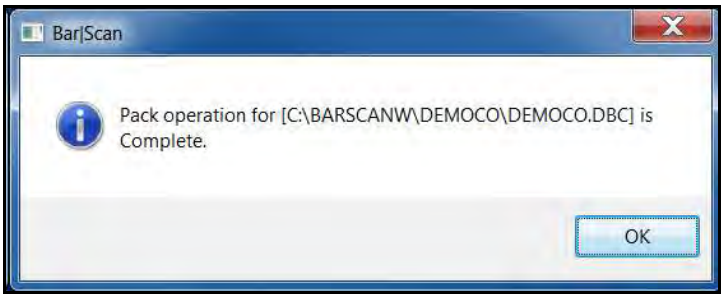
If you have a large number of assets and you know what specific table(s) you are interested in packing, select only those that you wish to Pack by selecting Pack and the Select Individual Tables option. You will then be allowed to highlight only the tables you wish to pack.



You want to be careful at this point, select to Pack all tables only if you do not know exactly which files need to be packed. This is especially true if you have very large tables. If for instance you have more than 100,000 assets, it could take up to one hour to pack all of your files over a network. If you know that only two tables need to be packed, it may only take ten minutes to pack these two tables. But, you have to know exactly which two to pack in order to do this.

If you are unsure which of the Individual User Data tables to pack, you should choose to pack all of your tables.

After Bar|Scan has finished packing the Individual User Data tables, all of them or only the ones you selected for packing, you will see a dialog box similar to the one below.



Reindex

Reindexing is a process by which Bar|Scan reorganizes its files. The main purpose of this item is to reindex the sort data files after a problem has occurred on the hard disk or memory. This is most often a damaged index file due to Bar|Scan terminating abnormally (such as turning off your computer while Bar|Scan is still running).

It is also necessary when you have had to restore your data files from a backup.

Hint: When you select the Reindex feature, Bar|Scan will highlight all of the tables to be Reindexed. You will almost always want to leave all of them highlighted. If you have a small number of assets, less than 20,000, it is most convenient to allow Bar|Scan to reindex all of the tables in your system. Also leave all of the tables highlighted for reindexing if you are not familiar enough with Bar|Scan tables to determine which tables need to be reindexed.

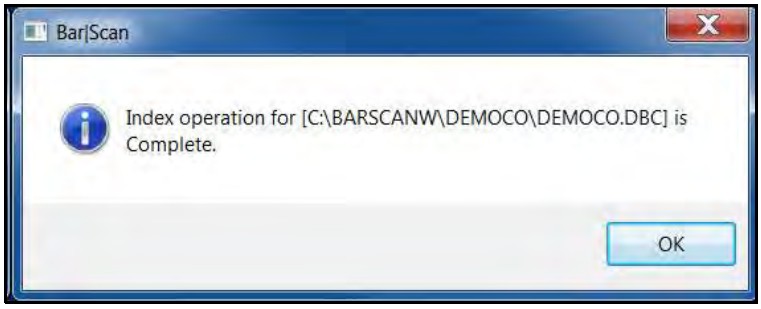
If you have a large number of assets and you know what specific tables you are interested in reindexing, select only those tables that you wish to have reindexed by selecting both Reindex and the Select Individual Tables option. Bar|Scan will stop and you can then select the Tables individually as shown in the screen below where the Catalog Table was selected.

You want to be careful at this point, select only specific tables to be reindexed if you know exactly which tables need to be indexed. This is especially true if you have very large tables. If, for instance, you have more than 100,000 assets, it could take one hour to index all of your files over a network. If you know that only two tables need to be indexed, it may only take five or ten minutes to index these two tables. But, you have to know exactly which two to index in order to do this.

If you are unsure which tables to index, you should leave all of the tables highlighted, and let Bar|Scan index all of them.

Bar|Scan will index all of the tables or only those that you ask to have indexed, depending on your choices.

When you select to Reindex your company(s), Bar|Scan will immediately begin the process, and when finished will display a message similar to the one below.

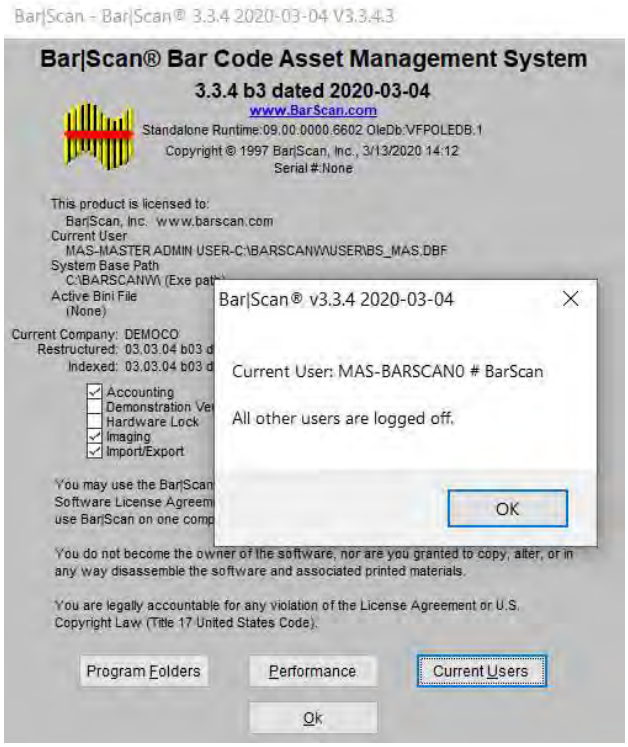


How can I log everyone out of Bar|Scan so that I can perform a Table Integrity?

Sometimes you cannot perform Table Integrity because other Users are logged in and have Tables open. How can you log everyone out of Bar|Scan so that I can reindex?

First, check to see if there are any others currently logged in. From the Bar|Scan Main Menu select Help- ▸ About Bar|Scan for Windows. Click on the 'Current Users' icon. The list will display any others currently logged in. You can then contact these people to log out.

A sample of the panel is displayed at the right:



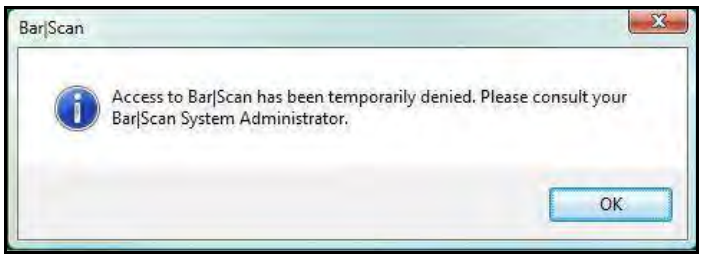
You can also have Bar|Scan lock everyone out with a Global Lock Feature. Open the User Table and then select 'User-▸ Global Lock' from the Main Menu. Everyone other than your password will be disabled until you unlock. If the user is currently logged in, it will not log the user out, rather it will prevent them from logging in the next time. See the image below:

There are two mechanisms for locking out users so that they cannot login. The first is the individual User table record, where the Lock field is set. The second in the global lockout accessed through the main menu bar system when the User screen is the current screen. You are familiar with the single user field. Here is how to unlock the global field if the user forgets who the key master user (ie, the only user allowed to log back in if they should log out while the global lock is active).

What if I am the Administrator and my access is denied?

This can occur under some circumstances, for example, the prior Bar|Scan Administrator is no longer responsible for Bar|Scan and you were not setup by that person to be the new Administrator. Or, the Administrator is temporarily unavailable and access is urgently required.

You might be presented with the message below.

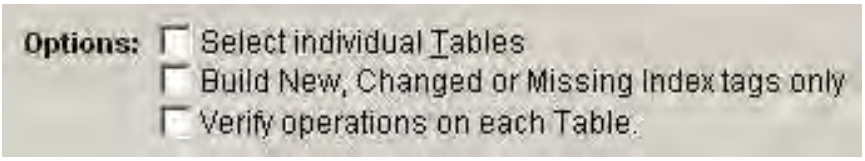


Your only option is to remove the global lock. However, any individual locks will not be affected.

Open Windows explorer and Look in BARSCANW\SYSUSER for a file named BSLOCK.TXT. If it exists then all users are locked out except one. Delete the BSLOCK.TXT file. This removes the global lock. However, any individual locks will not be affected.

Options

When you select one or more of the Restructure, Pack, and Reindex features in Bar|Scan the items to their immediate right will go from being "greyed out" to being accessible, as shown below.



Select Individual Tables

The Select Individual Tables option will become available when you select to Restructure, Pack, or Reindex features for one or more companies. When it becomes available, clicking on the white box beside this option before clicking on the Ok button, will allow you to select which tables you Restructure, Pack, or Reindex. This is extremely important if your database is very large, and time is critical. You can select only the table(s) that require a Restructure, Pack, or Reindex and skip those that are not affected. This feature requires a thorough knowledge of the Bar|Scan system, and is normally selected by advanced users.

Build New or Missing Index Tags Only

When you select to Reindex one or more companies, the option Build New or Missing Index tags only will become available. As the title suggests, this will allow you to Reindex your company, and have it build only new or missing index tags. This is important when you have indexed your company before, but have

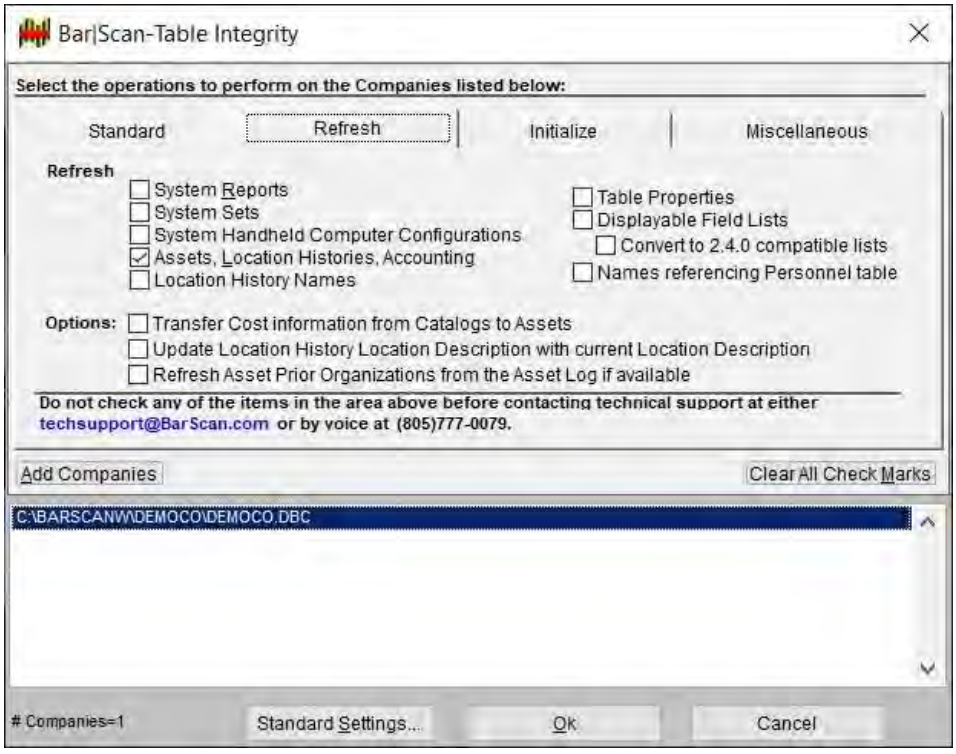
upgraded or added new fields that produce a message saying that there is a missing index tag. This does not take as long as a full Reindex.

Verify Operations on Each Table

The Verify Operations on each Table option should be selected if you want to check every change that the Restructure or Reindex may cause, before the change is made. In this way, you could keep some changes from taking place. You should only select this option if you are very familiar with the changes that will be made, or if you are instructed to select this option by Bar|Scan technical support.

Refresh

The second Tab, Refresh, is a way to update and correct possible problems with your company tables.



Sometimes, when updating your program to a new version, or if you are having very specific problems with your tables, we may ask you to choose one or more of the options listed under the Refresh heading.

Refresh System Reports

Bar|Scan provides a set of standard set of System Reports and Set commands. These were provided when Bar|Scan was first installed on your computer. When you receive a new version of the Bar|Scan program, additional System Reports or Set commands may be provided to you.

The Refresh Files feature incorporates these new system reports (provided as part of your Bar|Scan update) into your companies. If you have one or more companies selected and you select to refresh the System Reports, Bar|Scan will immediately begin the process. You will see messages updating the progress. When the process has completed, you will see a dialog box similar to the one below.

Refresh System Sets

The next item that you can choose to refresh, is the System Sets. Similar to updating System reports, from time to time your Bar|Scan updates may include new System Sets. This refresh item will incorporate the new Systems Sets into your existing list if you select your companies, and select this item. Select all of your companies, and select to refresh the System Sets, and Bar|Scan will start the refresh process. When done, you will see a dialog box like the one below.

Refresh System Handheld Computer Configurations

The next item that you can choose to refresh, is the System Handheld Computer Configuration. This will place Legacy Handheld Computer Communication Configurations into your selection of Configurations. Since 2006, Bar|Scan installs only Pocket PC configurations. Since 2022, Bar|Scan installs only Android configurations. If you still have older style Handheld Computers, they are still supported and you might need to perform this refresh to load their Communication Configurations.

Refresh Asset and Location Histories, Accounting

The next item that you may choose under Refresh is Asset Location Historys and Accounting.

This item may be required if you have a bad index. Bar|Scan technical support will tell you if you need to select this item.

Bar|Scan keeps a complete history of all locations scanned or entered with the Mobile Device, as well as those entered at the keyboard.

Since Location History is kept in a different database than asset information, there may be times when the information in these databases differs. This is especially true of you have experienced computer hardware problems.

Finally, you can use this option to initialize Accounting Information as discussed previously under “Transfer Cost information from Catalogs to Assets”

Bar|Scan can compare and correct problems associated with location history if you select the Refresh Asset Table Locations from Location History option.

When you choose this feature Bar|Scan will begin replacing the current and prior locations in the Asset Table with those in the Location History Table.

Important: Do not perform this action unless you have confirmed that the problem is in your Asset table or you have contacted your Bar|Scan Dealer.

If you have selected one or more companies, and have selected the (Refresh) Asset and Location History Locations, Bar|Scan will begin the refresh process. When finished, you will be shown a dialog box similar to the one below.

Refresh Location History Names

This item will replace blank Location History Names with the oldest recorded name. If you had a name in the Location History Name field, i.e., John Q. Public, but for next few (newer) edits, the Name field appeared blank. If you did not intentionally make this item blank, you could select this Refresh item to force Bar|Scan to replace the blank field with the name that had appeared in this field on previous location histories, John Q. Public.

Please use caution when selecting this item. The Location History Name field may have been blank on purpose.

Bar|Scan can only use Names that have appeared in older Location History items to replace a blank Location History Name field. Older Location Histories are listed under the newer ones in the Asset table.

If you select this item, while having one or more companies selected, the process will begin immediately.

Refresh Table Properties

This feature is rarely used. It ensures that the table names are set properly in the file list. This is needed only when the actual names of the tables have changed, and the tables display the older names.

If you select this item, while having one or more companies selected, the process will begin immediately.

Refresh Displayable Field Lists

This item will be used only when you get an update to your Bar|Scan program, and the items in any available field lists have changed. You would see this type of list when you select to add a column to a report. These lists do not always change during an update, but at no time would it be harmful to use this item. This item will only allow you to view new or changed items in your list, and will not overwrite any old data.

If you select this item, while having one or more companies selected, the process will begin immediately.

Names Referencing Personnel table

Rebuilds the Personnel Table and all related uses of the Names field according to current rules located in the Company Settings Table, Key Fields Tab. For example, you can use this feature to change all names from First Name/Last Name to Last Name/First Name.

Transfer Cost information from Catalogs to Assets

This option can only be used in conjunction with "Refresh Assets, Location Histories Accounting" which is discussed in the following Refresh Section. This option will initialize all blank costs on the Basis Tab of the Asset Panel with the Accounting Initialization Costs on the Accounting Tab of the Catalog Panel.

You should only select this option if you are very familiar with the changes that will be made, or if you are instructed to select this option by Bar|Scan technical support.

Update Location History Location Description with current Location Description

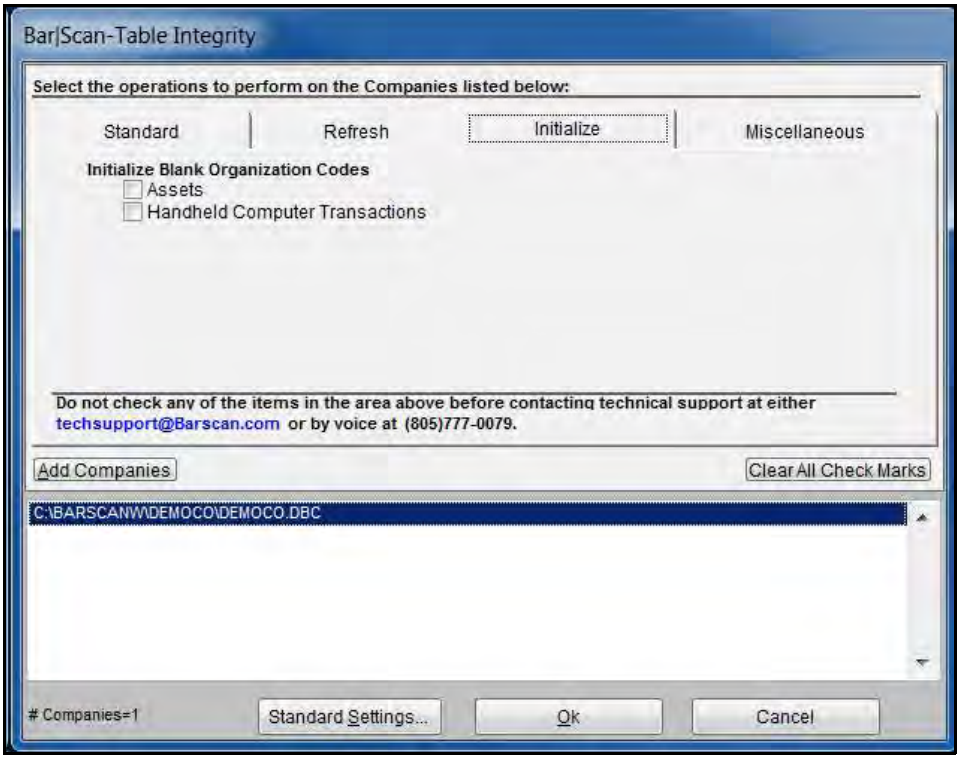
This option can be used to replace any text that may have been entered into the Asset's Location History Description with the corresponding description contained in the Location History Table.

You should only select this option if you are very familiar with the changes that will be made, or if you are instructed to select this option by Bar|Scan technical support.

Refresh Asset Prior Organizations from the Asset Log if available

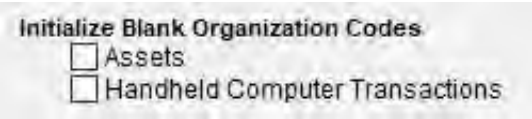
This option should not be used without first consulting Bar|Scan technical support.

The next tab contains Initialize features as follows:



Initialize Blank Organization Codes

The Table Integrity panel also has a feature which allows you to fill in blank Organization Codes in your Asset or Transaction table, with the referenced Organization Codes from the Location table, when one exists in the Location table.

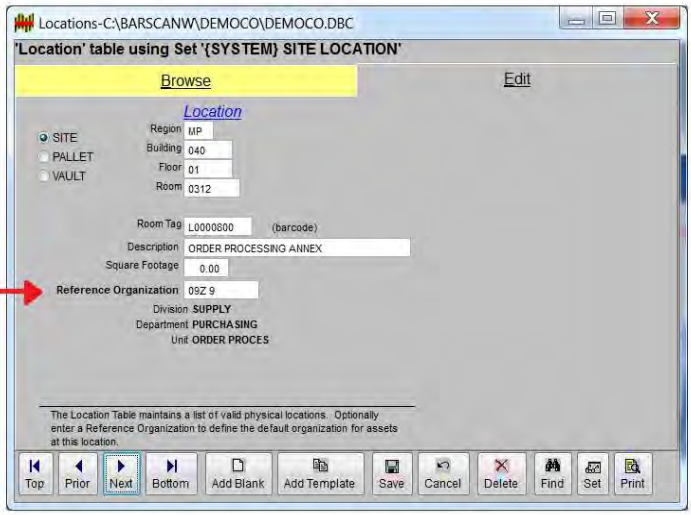


Assets

This procedure will check all assets in the Asset Table that have blank Organization Codes. If the current location of the Asset has a Reference Organization Code in the Location table then the Organization Code of the Asset will be changed to match the Reference Organization code in the Location table.

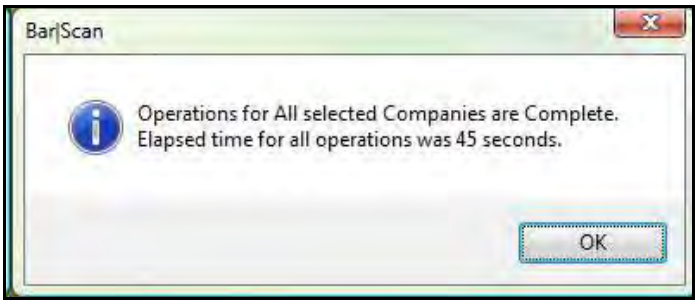
A sample location is displayed below.

Reference Organization



The Organization Code is displayed “referenced” here. If the Location History Organization field is blank, yet an Organization is displayed here for that same Location, you can make Bar|Scan fill in the Organization Code for you.

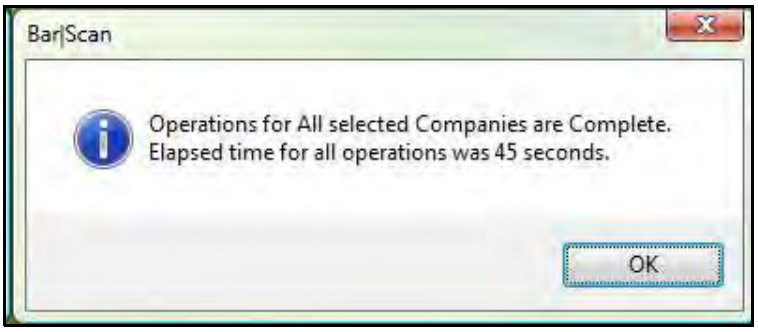
When you select to Initialize Blank Organization Codes, Assets, Bar|Scan will begin checking all Assets that have a blank Organization code, and then filling in the blank spaces with the referenced Organization Code from the Location table. When finished, you will see a message similar to the following.



Handheld Computer Transactions

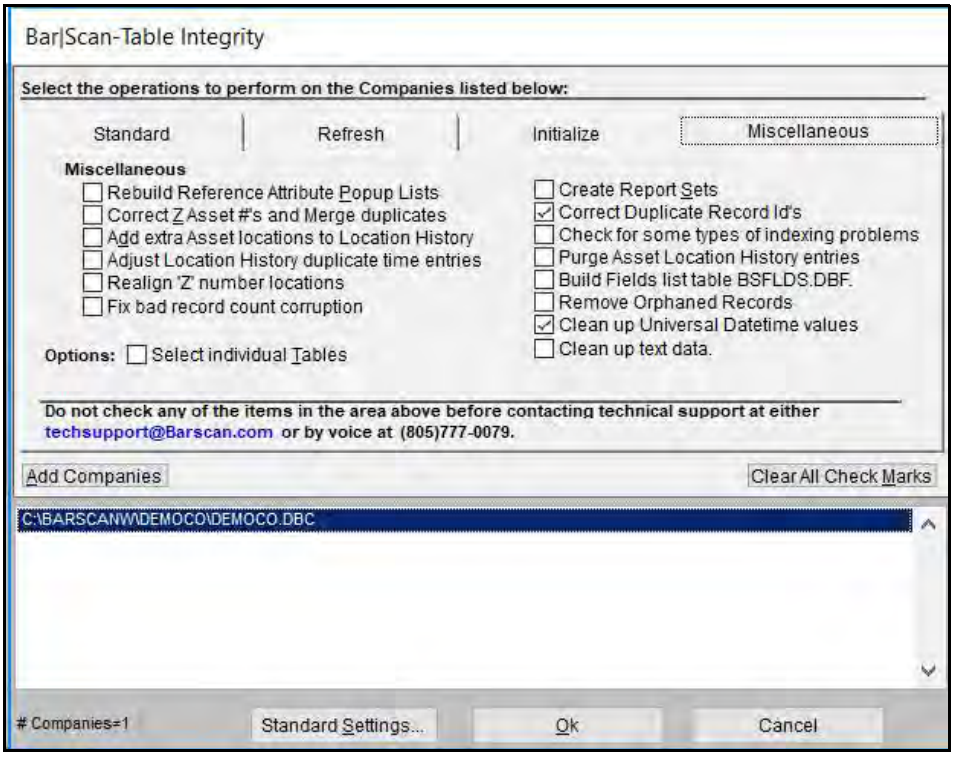
You may select to Initialize Blank Organization Codes, Handheld Computer Transactions. This will replace all the blank Organization Codes in the Transaction table with the referenced Organization Code from the Location table.

When you select this feature, Bar|Scan will begin to check all of your Transactions for blank Organization codes, and replacing them with the referenced Organization Codes listed in your Location table. Bar|Scan will replace any blank organizations in your Transaction table with those new ones, using the locations as a guide. When finished with this process, you will be shown a dialog box similar to the one below.



Miscellaneous

There are more items on the Miscellaneous tab, as shown below.



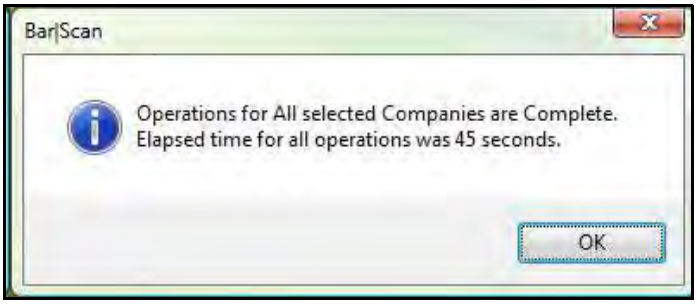
Rebuild Reference Attribute Look up Window

After adding and deleting many Catalogs, you may no longer have accurate Look up lists for your Types, Descriptions, and Attributes. This feature allows you to create new lists for your Catalog table.

The new lists will contain all the choices which already occur in your Catalog database, and the default items from the original lists sent with your Bar|Scan program. See *Attributes* in *Chapter 7 - Catalogs* if you are not sure if you wish to rebuild the lists for your Catalog Attributes.

When you select one or more Companies, then select to Rebuild Catalog Attributes from the Table Integrity window, Bar|Scan will start the process of rebuilding your lists for Catalog Attributes.

Bar|Scan will replace the old lists with the new ones. When done, you will be shown a dialog box similar to the one below.



Correct Duplicate 'Z' Asset Numbers and Merge Duplicates

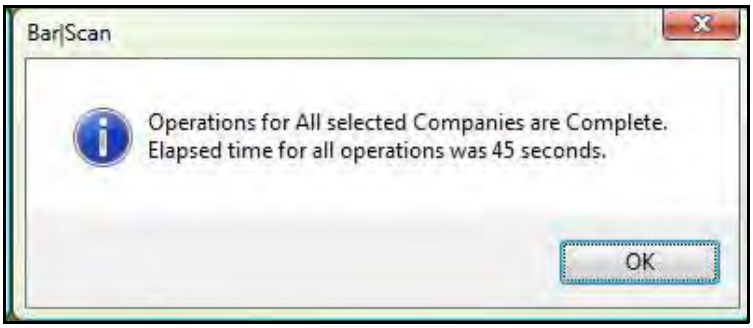
The next item Miscellaneous item is Correct Duplicate 'Z' Asset Numbers. When you select one or more companies then select this item, Bar|Scan will begin the renumbering and consolidating your Z number assets.

Note: Be careful when selecting this feature that you actually need this process to be done, as any new numbers generated will not match previous reports. If you are unsure if you need to use this feature, please contact Bar|Scan for technical support before selecting this item.

Remember 'Z' asset numbers are only associated with the "Quantity Mode" in the Mobile Device, so this feature is only applicable if you are using the Quantity Mode. See *Chapter 11- Bar|Scan Mobile* for more information regarding the "Quantity Mode."

Add Extra Asset Locations to Location History

If locations were inadvertently removed from the Location History Table, the Current and Prior Locations can be recovered from the Asset Table. You can have Bar|Scan perform these functions by selecting this feature. Bar|Scan will immediately begin checking the Asset table for additional locations, and you will see dialog messages displaying the progress. When the process has been completed, you will see a message similar to the following.



Please contact your Bar|Scan dealer **before** performing this operation.

Adjust Location History Duplicate Time Entries

This feature checks all time entries in the Location Histories for items that appear as exact duplicates. When exact duplicates are found, the time on one of these items will be changed by one minute, so they are no longer exact duplicates.

Note: Be careful when selecting this feature, as items that appear on earlier reports can be affected. If you are unsure if you should use this feature, please contact Bar|Scan technical support, prior to selecting this item.

Realign 'Z' Number Locations

This feature is only used if there has been a problem with the database, and more than one location exists for a given Z number.

This item is used to review all of the location information for the Z number assets, to ensure that there is only one location listed for each Z number. If more than one location is detected, then the oldest location is used, and the other locations are modified to match it.

Fix bad record and memo block counts

Contact us or your Bar|Scan Dealer for support before using this feature.

During a Table Integrity, you may receive a message similar to 'Unable to restructure table ... \\tablename has been corrupted. The table will need to be repaired before using again.

This feature is used when Tables appear to be corrupted. Table corruptions involves a table header miscount of the actual number of records in the file. Because of the miscount, the table cannot be read. Using this option sets the record count in the header to the nearest accurate count of actual records in the file. This will sometimes allow access to the table so that the data can be examined.

This option should be run alone, meaning uncheck all other items before checking this. When completed, run a regular Table Integrity again to make sure that the message does not appear again.

This is just the start of analysis. Data may have already been lost, or corrupted. Use of this feature is recommended only when there is no available, acceptable, backup of the damaged table. Even if the damaged table is fully restored to use with this function, data may still have been lost or damaged so it will need to be examined.

Create Report Sets

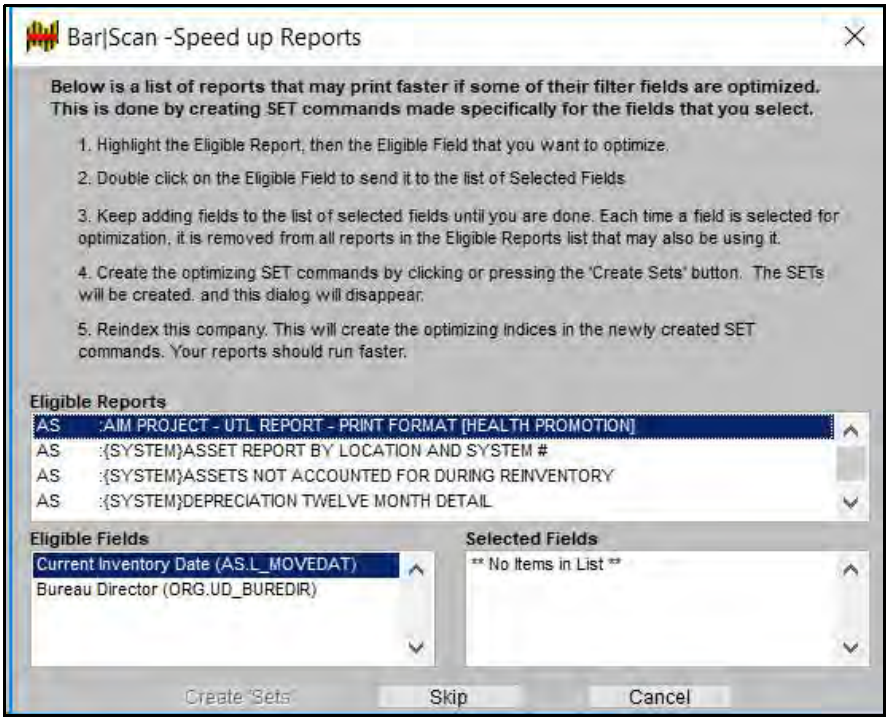
Indexes are constantly used by the system to make queries. You use queries to

perform look ups and to perform sorts. These queries are also used for reports. Because you can run queries and reports on such a variety of things, there are many items that can require inordinately long query times, i.e., a report that asks for assets with a specific range of purchase cost. When printing this report, the query may take a long time without having its own index built, as the program would have to check every single asset for the requested information, filter out all of those that you do not want to see, and display those that you do want to see.

Bar|Scan is installed with only those indexes that are necessary for the system to run.

Using this feature will allow you to select an item from a report, and build a new index, or Set, for that item. This will substantially reduce the query time necessary for your report.

To access this feature, simply select Create Report Sets, and click on the Ok button. You will see a panel similar to the one below.



In the above example, you would first pick your report, then double click the eligible field that you want to build a Set for. When you double click an Eligible Field on the left, it will be sent to the Selected Field list on the right. Keep adding fields to the list of Selected Fields until you are satisfied that your list is complete.

When your list of Selected Fields is complete, Click on the Create 'Sets' button. This will create the optimizing Set commands, and this dialog will disappear.

You then have to Reindex this company so that the index is created.

Later, when running the report, rather than checking every single asset for this information, the Bar|Scan program only has to check the pre-made index. This will substantially reduce the time necessary for the query, and your report will print much faster.

Care should be taken when selecting this feature. Do not index too many fields in the database. Remember, each index or 'Set' you add can slow other processes down, i.e., each Set you add will add an item to your Reindex. Each time you Reindex, it will take a longer period of time.

Correct Duplicate Record Id's

This item will check for, and correct any duplicate record identification numbers that it finds.

Record identification numbers are used internally by Bar|Scan, and you never see them. But, if there are duplicates, it could cause problems such as duplicated items within your program, i.e., duplicated Work Orders, where you cannot access the duplicate, only view it.

Please contact Technical Support if you think you may have this problem before you select this item.

Check for Some Types of Indexing Problems

This item will check the validity of the indices in most cases.

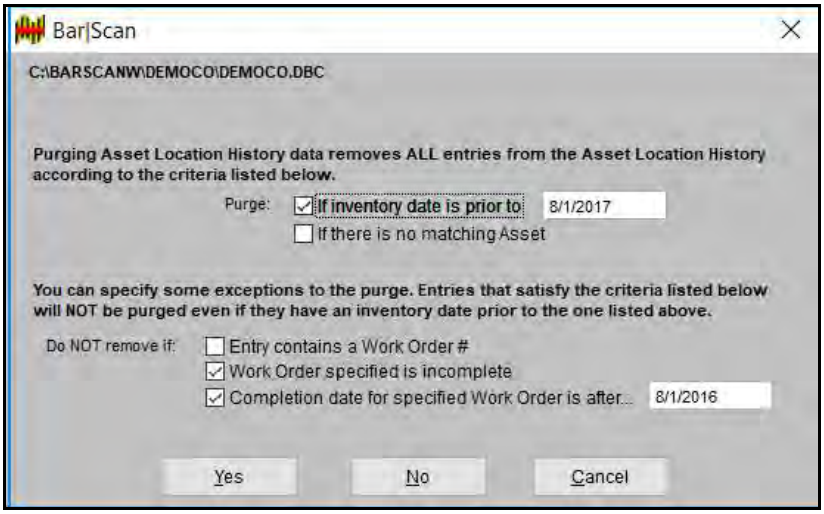
Care should be used when accessing this feature, however, as this feature will

probably take longer to run then the actual reindex process.

It will not hurt your system to select this item. But, there may be times when you will need to reindex your system that may not show up when using this item to check the indices.

Purge Asset Location History Entries

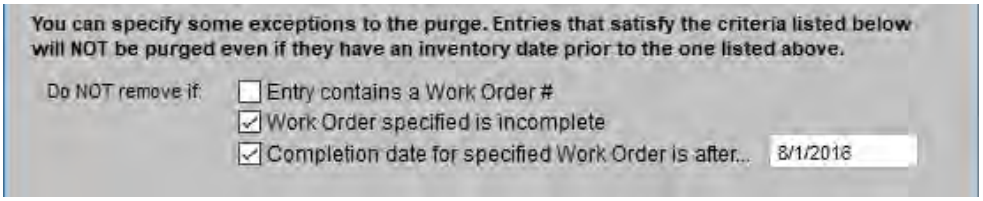
This item will remove unwanted Location History Information from Bar|Scan. When selected, you will be presented with the following screen.



This option should only be considered if you have had Bar|Scan for a long period of time, say more than five years, or you have a very frequent movement of asset or both.

This is not a mandatory function and Bar|Scan will work properly even if you never perform this function. However, on large databases with over 100,000 assets or a warehouse implementation of Bar|Scan, you can accumulate tens of thousands of Location History entries which you will not need.

If you select “Purge if inventory date is prior to” then the bottom portion of the screen will present additional Work Order option as follows.



Build Field list table BSFLDS.DBF

This option will create a current list of all user accessible fields in your Bar|Scan database, including User Defined Fields and update the Bsflds.dbf file located in the Company folder.

This list is not used by Bar|Scan, but can be useful for ODBC access or use by other applications outside of Bar|Scan that may require the information to properly link to or extract data from Bar|Scan.

Remove Orphaned Records

This option will scan the Asset Location History and Work Order Detail as well as component tables such as the Asset Component Table and remove records that do not have a parent record in the Asset or Work Order Master Table.

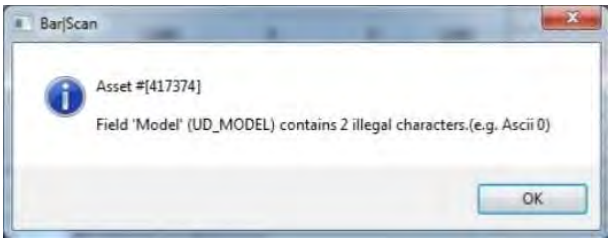
Clean up Universal Date/time values

Bar|Scan marks records with Universal Date Time (UDT) if it is available from your computer. On occasion your computer may not provide the local time zone information to Bar|Scan, such as when a firewall is blocking the query. This option will convert all Log Dates and Log Times to Universal Date Time and fill in any missing values.

Clean up Text Data

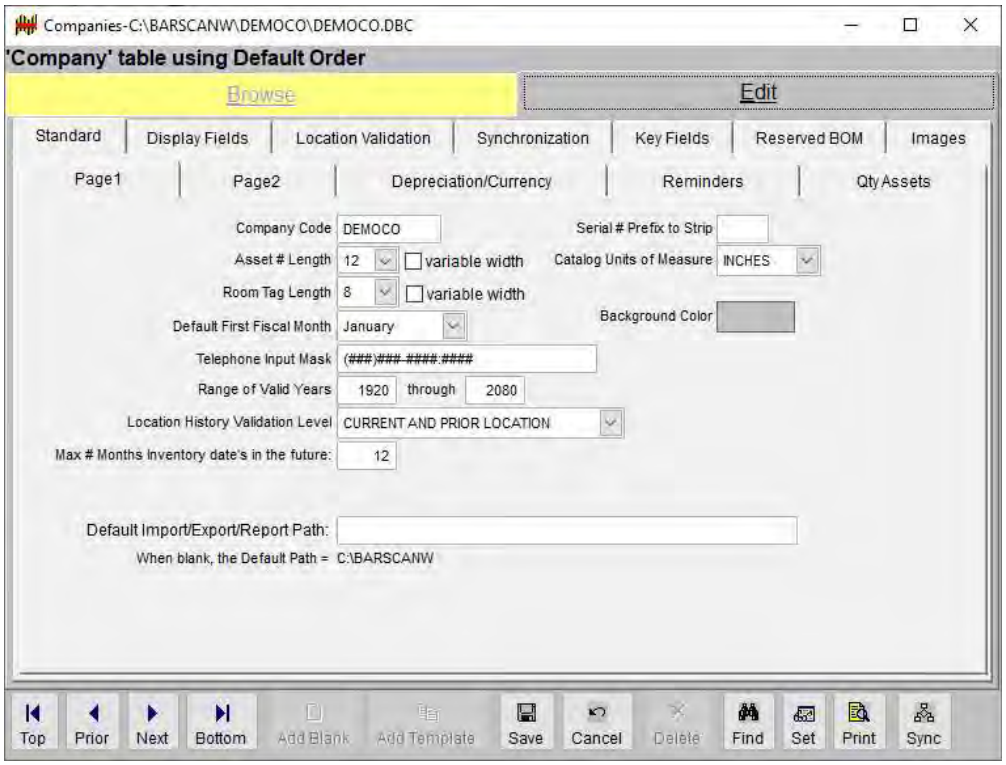
This message can occur if you receive an invalid ASCII character, sometimes call high order bits. There are other ASCII characters such as control characters that are also not allowed. These characters sometimes inadvertently appear due to a bad handheld scan, a bad disk write, or an import. The error screen may look like this screen.

Performing a Table Integrity with 'Clean up text data' marked on the Advanced Settings Screen will usually successfully repair these invalid ASCII characters.



SETTINGS

You will use the Settings feature under Housekeeping, to set up the properties for any new company that you add. On this table you can determine the Company Code, and length of the bar code asset number and it's justification, the length of the bar code Room tag.



There are many options that you can also choose from to customize your Company. For example, these include options for the Default First Fiscal Month, to strip a Serial Number prefix, whether or not to Round Calculated Depreciation, whether or not to Use Plain Organization Codes, and whether or not to Round Calculated Currencies, to strip Label Check Digits, several items about your Work Order numbers, and the input mask for the telephone numbers.

Standard Options Page 1

These options should be filled in when you first create a new company in Bar|Scan.

Company Code

A Company Code is required for each company entered into the Bar|Scan system. The Company Code is only used in conjunction with the Mobile Device (in order to upload to more than one Company's information simultaneously) and has no effect on how Bar|Scan is used on your Computer. However, each company must have a unique code.

Type in any numbers or characters to establish a company code. Spaces can also be used. Press the BACKSPACE or left-arrow key to edit your work.

When completed, press ENTER. You can use the up-arrow at any time prior to saving your work to return to the Company Code for editing.

You may press the ESC key at any time to return to the *Housekeeping* menu without any changes.

Asset # Length

Indicate the new length of the bar code asset number that you will be using for this Company. Any number from 5 to 75 is acceptable.

If you select variable width as the asset number length, Bar|Scan recognizes that you wish to accept varied asset number lengths, and will not validate the asset number length. In this case, you should set the length to the largest number that you expect to use.

Room Tag Length

Indicate the length of the bar code Room Tag number that you will be using for this Company. Any number from 4 to 10 is acceptable.

If you select variable width as the asset number length, Bar|Scan recognizes that you wish to accept varied asset number lengths, and will not validate the asset number length. In this case, you should set the length to the largest number that you expect to use.

If you do not plan to use the Room Tag feature, you can leave the length to the default. There is no need to adjust it.

Default First Fiscal Month

If you have the Accounting module, you may use this field to tell Bar|Scan the Default First Fiscal Month for your company. Click on the down arrow next to the field, and select the proper month.

Serial # Prefix to Strip

Serial numbers that are printed on the shipping labels of boxes often have a leading character(s) at the beginning of the actual serial number. Type into this field any leading charter(s) that you want Bar|Scan to ignore and remove. When the information is uploaded and validated, this item will make Bar|Scan ignore and remove the character(s) that you have typed into this field. This will allow you the option of scanning these serial numbers without opening the boxes. The Serial Number can only be stripped during an import of a Mobile Device File, or during the validation of an upload into the Transaction table.

Calculate Unit of Measure

You can change the method that Bar|Scan uses to *display* measurement. Your selection is either Inches or Millimeters. There are very few places where Bar|Scan displays measurement. One example is in the Catalog Table. Again this is only a display function and not a calculation function.

Background Color

This is a useful function for those who maintain more than one Company database. Each Database can have a theme color. This makes it easier to recognize which Company is in use. For example, you can make your Active Company Theme Red and your Salvage Company Green.

Telephone Input Mask

The input mask that is shown in this field will allow you to enter the telephone number without having to press the parenthesis or the dashes.

You can change the input mask to a different format, but in most cases this is not necessary.

Range of Valid Years

You can tell Bar|Scan to perform additional validation on every date that you enter. This prevents the accidental entry of obvious errors such as a Depreciation Start Date of 1886. Be careful to not set the Range too narrow as this is a global feature.

Location History Validation Level

Bar|Scan maintains a history of all of your asset inventories including manual changes. This asset location history is validated against multiple supporting tables such as the Location Table. If you have a high level of scan activity or have a large number of edits to the supporting tables, activities such as creating new Set Commands or performing a Table Integrity may take a long time, or you may just not be concerned with older location information.

For example, in an inventory stock room situation, assets may be scanned in and scanned out with such frequency that hundreds of location histories are generated daily - and you may only be concerned about where the asset is at the current time.

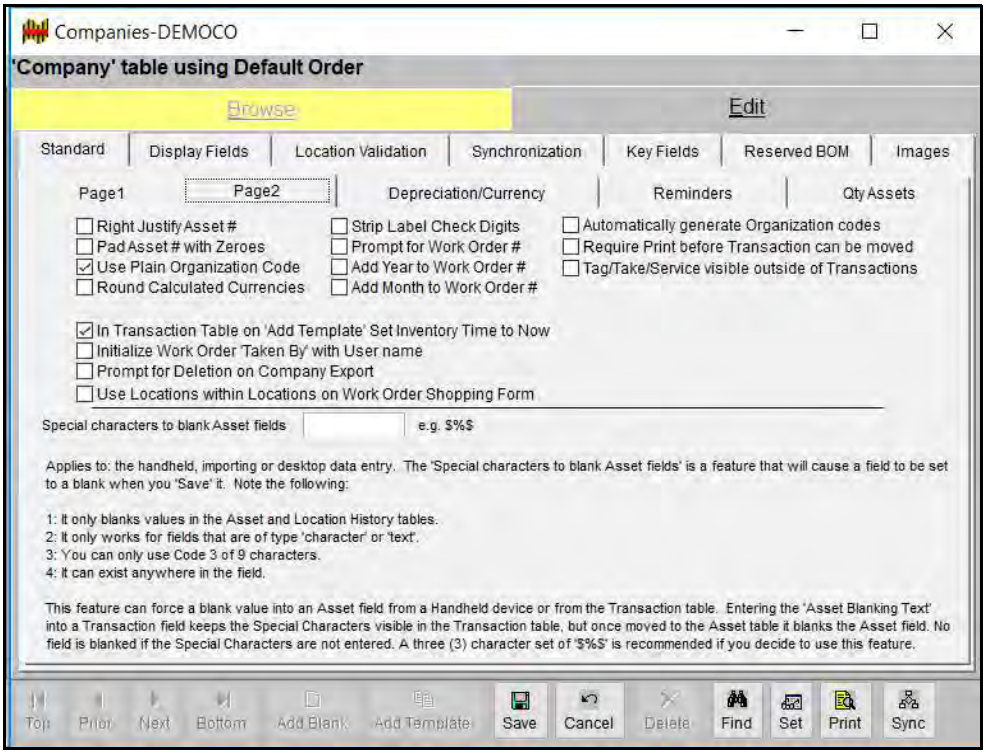
You can choose one of three amounts of validation that you wish Bar|Scan to perform.

Maximum # Day Inventory date's in the future

You may occasionally wish to enter a future inventory date into the handheld or desktop in order to process scheduled work, e.g. a Work Order. Bar|Scan would normally flag a future inventory date as an error unless this value is set to be greater than 0. The number of days in the future is determined by you.

Standard Options Page 2

This tab presents additional Company Settings.



Right Justify Asset #

Check this item only if your bar code asset labels have variable length asset numbers and you wish to append leading characters. If you wish to append

trailing characters, respond "N."

Normally, right justify only if you have bar codes of various lengths.

Note: All asset numbers in Bar|Scan must be of the same length, even if the bar codes are various lengths.

Pad Asset # With Zeroes

This option works in connection with Right Justify Asset Number above. In most cases you will need to check this item, if you checked the item above.

For example, if you had one bar code label of five characters 00463 and a six-digit bar code label 000682, if you used this feature the first bar code label would be changed to 000463, and the other would stay the same 000682 (assuming that the asset number length is set to six).

Use Plain Organization codes

Normally, Bar|Scan's Organization codes are six characters long. Checking the Use Plain Organization Codes item allows you to enter any combination of letters or numbers, up to six characters in length. If you want to enter a simpler Organization code such as AP or 503, you could if this item is checked.

If you do not check Use Plain Organization Codes, Bar|Scan will allow only formatted data to be entered as follows: two numeric, two alpha, then two numeric.

Round Calculated Currencies

Check this option if you want Bar|Scan to round the currency figures up and down to the nearest whole dollar in all of the calculations.

In Transaction Table on 'Add Template' Set Inventory Time to Now

Check this option if you want Bar|Scan to use the current inventory time and date rather than the time and date from the transaction that you are adding a template from.

Initialize Work Order 'Taken by' with User Name

Check this item if you use the Work Order module, and want Bar|Scan to automatically fill in the Taken By field with the initials that were used to log into the Bar|Scan program.

Prompt for Deletion on Company Export

This option is only for use with the Multiple Company Module. Check this item if you want to normally delete asset information after you copy it to a new Company. For example, if you are moving Assets from your Active Company to your Archive Company, you would want to use this setting.

Use Locations Within Locations

Use Locations within Locations on Work Order Shopping Form has a checkbox next to it. You only need to address this item if you are using the Work Order Shopping form. If you are using the Work Order Shopping Form, clicking on this item will allow you to specify partial locations. I.e., if you have a real location that is Region = CA, Building = 1900, Floor = 01, Room = 100, you could check this item and specify on the shopping form only Building = 1900, with no region, floor, or room noted, and it would be considered a valid location without adding it to the location table separately.

Strip Label Check Digits

On occasion, Code 39 font has an optional check digit at the end to increase the scan accuracy. These can be stripped as they are not necessary for operation of Bar|Scan. Selecting the Strip Label Check Digits will strip this additional character from the Asset Tag or Room Tag fields.

Prompt for Work Order #

Check this item if you want to manually enter the Work Order Number. Bar|Scan will prompt you for the Work Order Number, rather than assigning the next available number for you.

Add Year to Work Order #

Check this prompt only if you have not checked Prompt for Work Order #. Checking this prompt will make Bar|Scan add a four-digit year to the beginning of the Work Order Number that it is assigning.

Add Month to Work Order #

Check this prompt only if you have not checked Prompt for Work Order #. Checking this prompt will make Bar|Scan add a two-digit month to the beginning of the Work Order Number that it is assigning.

Note: If you have checked to add both the Year and the Month to the Work Order Number, the four-digit year will appear, then the two-digit month, followed by the sequential numbers for the Work Orders.

Automatically generate Organization Codes

Check this prompt only if you would like Bar|Scan to generate numeric organization codes. Once done, a newly added Organization entered in the Organization Edit screen will have a numeric organization automatically generated when saved.

Require Print before Transaction can be moved

Uncheck this prompt only if you wish to turn on the feature that requires a printed Transaction report prior to moving the items to the Asset Table. By default, this feature is checked on.

Tag/Take/Service visible outside of Transactions

The Tag/Take field is an editable field in the Transaction table and is critical in determining how the transaction moves from the Transaction table to the asset and Location History tables. However, once the move is complete the Tag/Take operator is only needed for historical purposes hence is not displayed. If this setting is selected, a Tag/Take column is displayed in the Asset Location History.

The field indicates what kind of inventory operation was performed (either ‘Tag’

or ‘Take’ or ‘Service’), which is important in the Transaction table but once moved to the Asset Location History is only needed for logging or historical purposes. The Default is to not show this information in the Asset Location History.

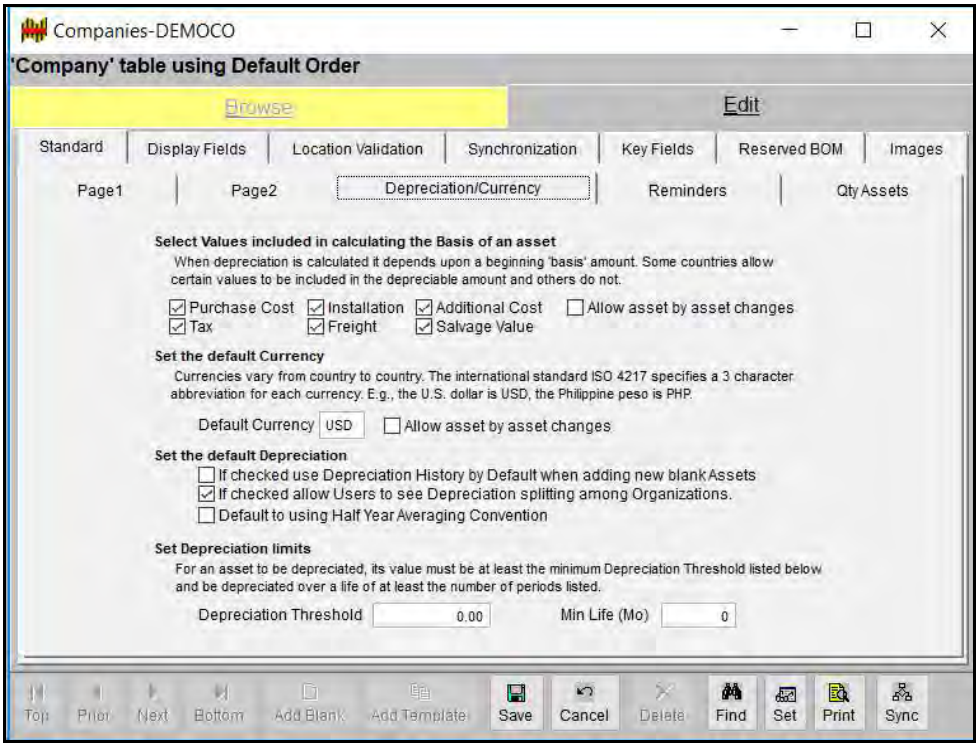
Special characters to blank Asset fields

By default, when Bar|Scan imports information either from a handheld or an external file or a keyboard, Bar|Scan does not overwrite existing data in a field with a blank. For example, if your handheld prompts for Purchase Order Number and you leave the response blank, whatever previously exists in the Asset Table will remain. In other words, by default, there is no process to remove data and replace it intentionally with a blank.

This option allows the intentional replacement of data with a black. The details on how this is accomplished is documented on the screen.

Standard Options Depreciation/Currency

This tab presents additional Company Settings related to Accounting.

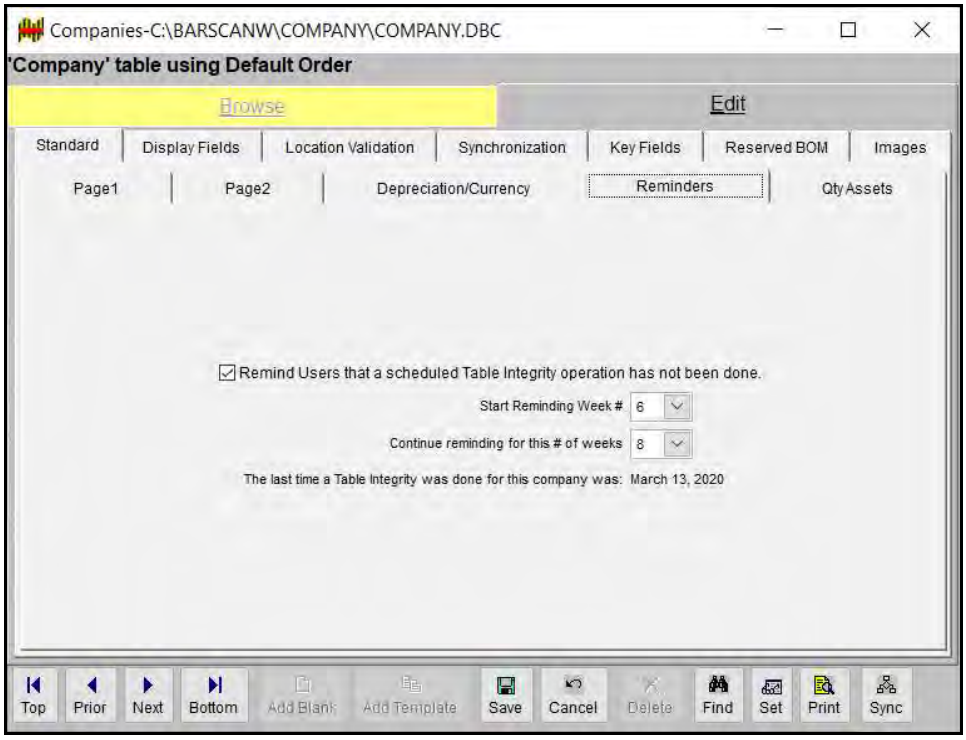


These Company Settings are only applicable if you have the Accounting Module. Some countries have different costs that can be included in their depreciation calculation. This is where the selection of which costs are depreciable can be made.

Typically, you will need to consult with your Fixed Asset Accounting Manager before making any changes to this page.

Standard Options Reminders

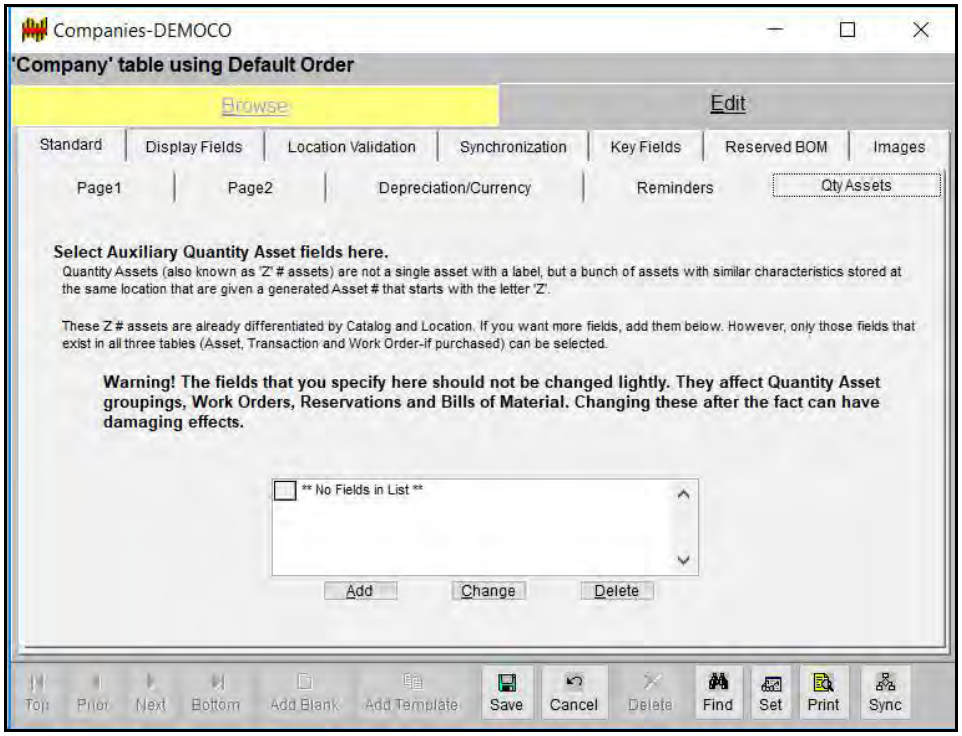
This tab presents additional Company Settings related to Table Integrity reminders.



We recommend that perform a Table Integrity at least every 6 weeks. You may adjust the reminder schedule.

Quantity Assets

Bar|Scan will allow you to track assets without the need to apply individual bar code labels. The Mobile Device can perform an inventory prompting for Quantity instead of Asset Number. This tab presents additional Company Settings related to Quantity Assets.

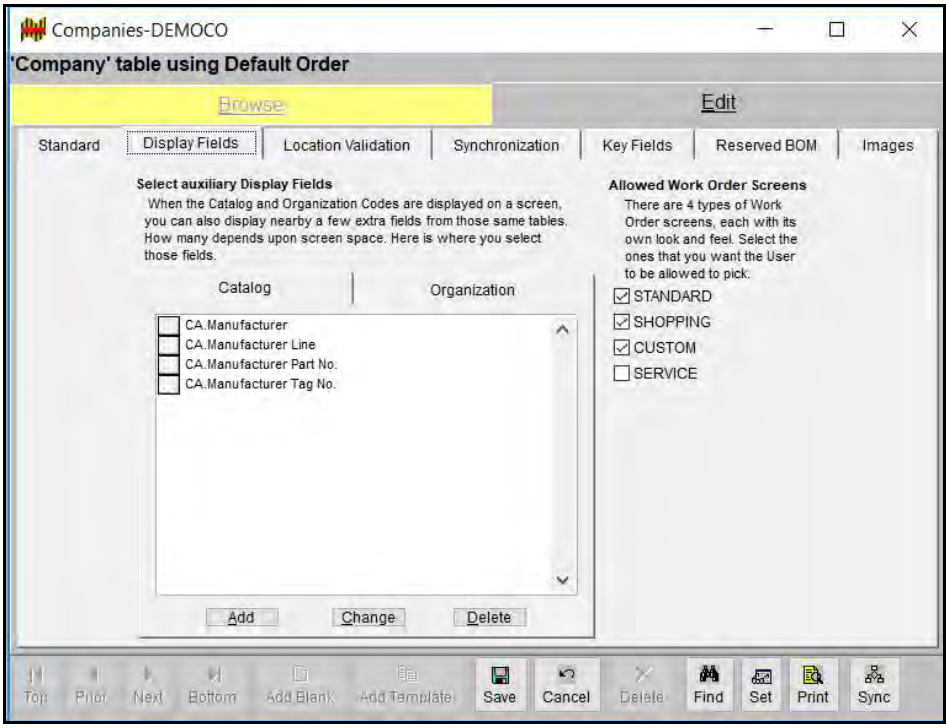


You determine which combination of fields will make a Z number. This is done on this Screen. It is important to decide this combination before entering your first quantity items.

For more information on using the Quantity prompt with the Mobile Device, see *Chapter 11 - Bar|Scan Mobile*.

Display Fields

This tab contains options for you to select Catalog and Organization fields to display on your Asset table. The tab you will see will be similar to the one below.



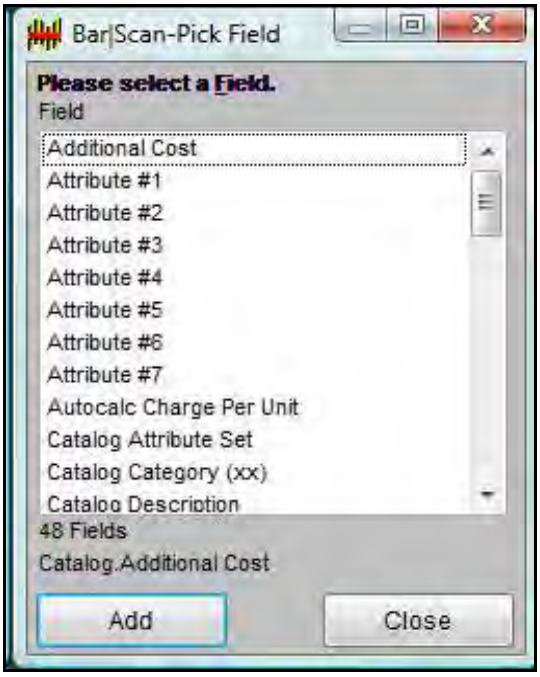
Select Auxiliary Display Fields

For instance, if you would like to be able to view the Manufacturer of the Catalog items on the Asset table, you could select Catalog, then select the Add button, then select the Manufacturer. Save your change. There is no message, but the change is immediate, and the top of the Asset Edit tab would change similar to the one below.

As you can see, there are many fields from the Catalog and Organization tables that you could select, but you should try to limit your choices to approximately three fields, because of available space on the Asset table.

Note: These are not additional fields. If you look at the portion of the Asset table that is displaying the Manufacturer, you will notice that the Catalog Type and Description are both gone. You could select all three items from the lists, and all three will display.

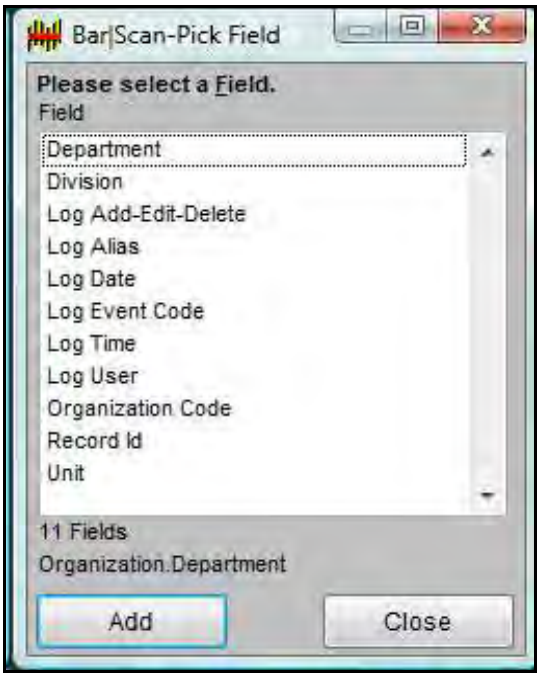
When you wish to display a Catalog field on your Asset table, you may select a field by choosing the Add button. When you click on the add button, you will see a look up list similar to the one below.



You may choose to display any of the 48 fields listed here. Highlight the desired field, and click on the Add button. The field will be added to the list of auxiliary Catalog fields to display. Once you have saved your change(s), the change will be immediate, and there will be no additional message. Note: If you have a panel open, i.e., the Asset table Edit panel, you will not see the changes until you close and reopen the panel.

Once you have at least one item in the list, you may highlight that item, and then select to either change that field or to delete that field, by clicking on the respective buttons.

If you wish to display an Organization field, you can click on the Organization tab, and then click on the Add button. You will see a pick field list similar to the one below.



You may choose to display any of the 11 fields listed here. Highlight the desired field, and click on the Add button. The field will be added to the list of auxiliary Organization fields to display. Once you save your changes, the field will be displayed on your other tables.

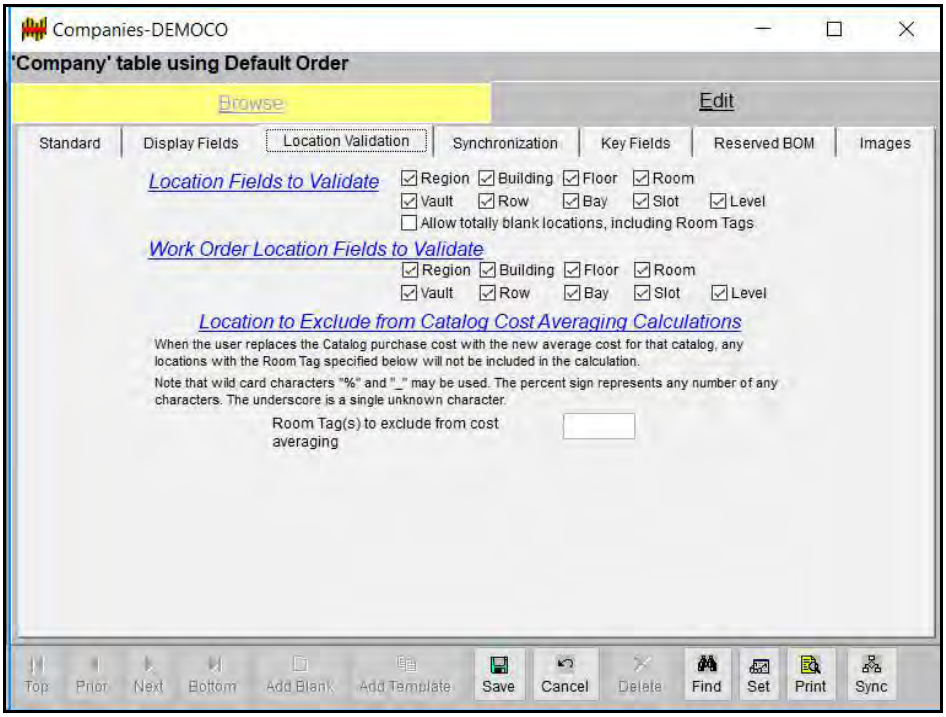
Note: The fields that are selected here are not additional fields. Organization fields are already displayed on the Asset table. If you select fields here, the fields that are automatically displayed will be replaced with the ones you select here. For example, Division, Department, and Unit are automatically displayed on the Asset table. If you select only Division to be displayed on your Asset table, the

display will change to say only Division.

Once you have at least one item in the list, you may highlight that item, and then select to either change that field or to delete that field, by clicking on the respective buttons.

Location Field Validation

The next tab, Location Field Validation is displayed below.



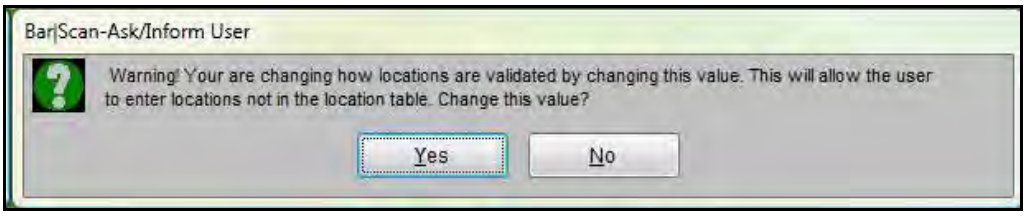
This tab will give you the option of entering Location and Work Order Location fields that will not be validated by the system. For instance, you may want Bar|Scan to validate only the Region and Building fields, and not check the Floor and Room fields.

By clicking on only the Region and Building fields, you can enter Floor and Room locations that are not in the Location table, and Bar|Scan would not consider this an error.

For example, you may want to create a Work Order that says to deliver conference chairs and tables to the South side patio of your building. Yet, you do not have a location in Bar|Scan that specifies this patio. Using this feature, you could be specific about where to place the furniture, and Bar|Scan would accept it as a valid location.

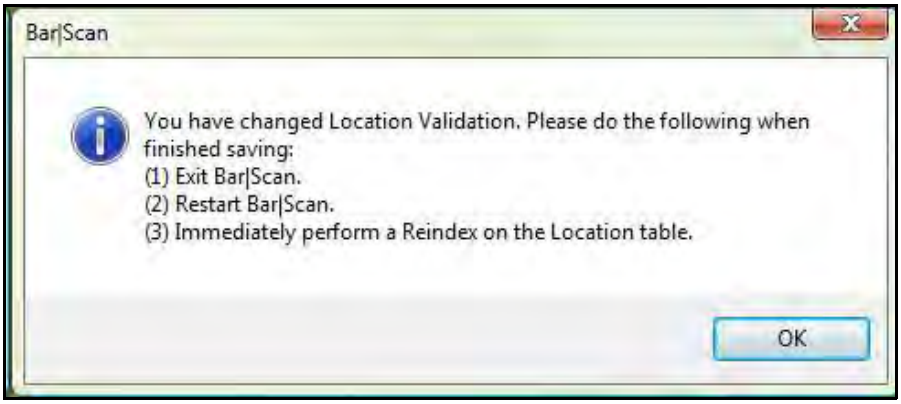
If you do not use a field, such as Region, making sure the system does not validate that field is of no advantage.

When you click on the box next to a field to remove the check, you will see a message similar to the following.



If your change was intentional, simply click on the Yes button.

After you have finished making all of the changes that you intend to make, you need to save your changes by selecting the Save icon from the tool bar, or by pressing the Ctrl + S key combination. You will be shown a dialog box similar to the following.



As the dialog box says, you need to immediately exit Bar|Scan, reopen Bar|Scan, and perform a Reindex on the Location table of this company, before this feature will work.

You can later go back to checking any items that you have selected to not be validated by returning to this screen and clicking to add check marks to the proper fields. Be careful, though, as Bar|Scan will check Transactions as well as the current location for your Assets, as well as all new Assets being added to the system. This may cause you to have errors on Assets that were previously considered to have no errors.

Company Synchronization

Introduction

Bar|Scan allows you to actually maintain a single company over a wide-area network or Internet server while still maintaining much of the speed associated with having your company on your local server. This is done by synchronizing two working company databases which can reside on separate servers. Changes can be made to both company databases concurrently. The changes made to one database appear on the other database on a regular interval determined by you.

Bar|Scan keeps track of the changes made in a company, considering which Bar|Scan Tables were used, then sending those changes to a specific set of email accounts. In turn, when the data arrives at those accounts via email it is picked up by a separate Bar|Scan license in the receiving location and applied to the target company. From Bar|Scan's perspective the number of companies that can be involved in these transfers is unlimited, but in reality they are limited by the practical considerations related to the email system itself, and by the actual number of company databases and tables desired and the time it takes to prepare and send the emails.

Requirements for Company Synchronization

Your computer requirements for synchronization include network access when the timed or scheduled synchronization begins. Additional requirements are:

✓ Sufficient disk space for your Company, emails, etc.

✓ Both computers are using the same version of the Bar|Scan application

✓ Import/Export Module for implementation of Bar|Scan Logging feature

✓ Multiple Company Module for implementation of Bar|Scan Company Synchronization feature

✓ A valid anti-virus program recognized by Microsoft Windows

✓ Microsoft Windows 8, 10 or 11. As of this document date, Windows 8, 10 or 10 allow client programs to access Outlook without sending multiple messages to the user if there is a valid anti-virus program installed and recognized by the operating system.

✓ Microsoft Outlook 2016 or newer, installed on all workstations either sending or receiving synchronization emails.

Steps to Implement Company Synchronization

Since Company Synchronization requires two separated companies, it is assumed that all sites already have the Bar|Scan application properly installed. The detailed steps required to setup synchronization between companies differ slightly depending upon the type of synchronization desired, but the overall outline is the same for all sites.

1. Configure user access to the Company Synchronization screen and functions.

2. In the Bar|Scan Company Synchronization screen create and configure a synchronization configuration. This will control how data comes in to and goes out from the company specified in the configuration.

3. Decide to do synchronization manually or on an automated timed basis. If automated, set up the appropriate Bar|Scan user account, ‘ .bini’ file (Bar|Scan initialization file) and Windows Task Scheduler item.

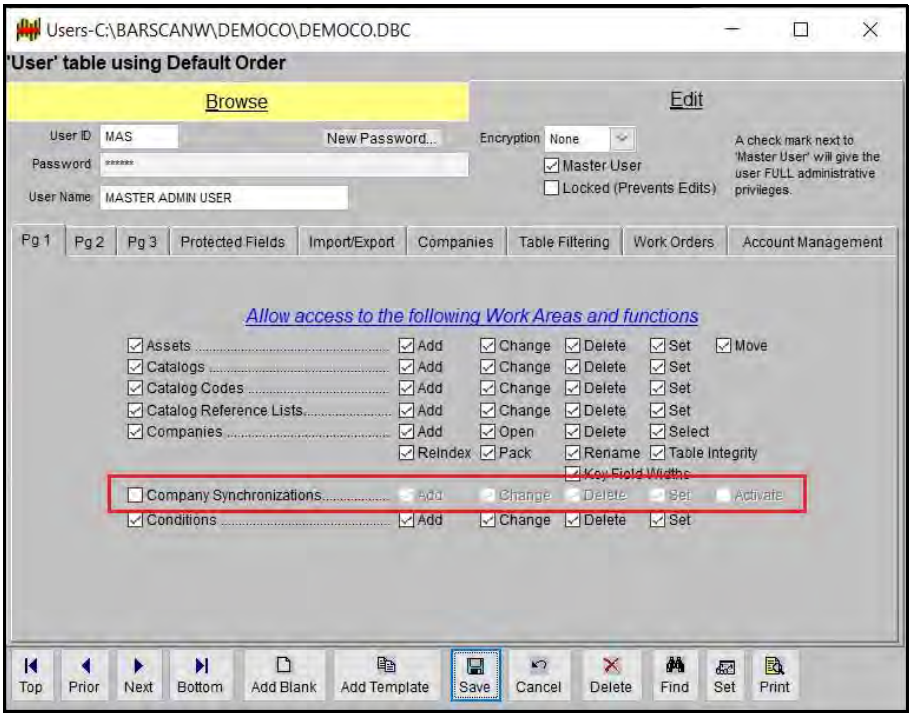
Allowing Access

The default configuration of Bar|Scan does not allow access to the Company Synchronization screens. You will have to allow access to users who will be involved in either sending or receiving company data. To allow access to Company Synchronization do the following:

1. From the main menu access the User Screen. (File... ▸ Open... ▸ Users).

2. Select the user whom you want to give the option of accessing one or more of the Company Synchronization features. If you do not yet have any users, see the section on how to add new users.

3. Select the 'Edit' tab, then select the 'Page 1' tab. You will see a screen similar to the one in below. Note that the line where you see 'Company Synchronizations' is unchecked. See the example below for reference to the User Screen with Company Synchronization unchecked.



4. Put a check mark next to 'Company Synchronizations'. This will allow access to the other options related to this function. Depending upon the role that your user is going to play, select the functions that this user will be allowed to perform once they have accessed the Company Synchronization screen and then press the 'Save' button.

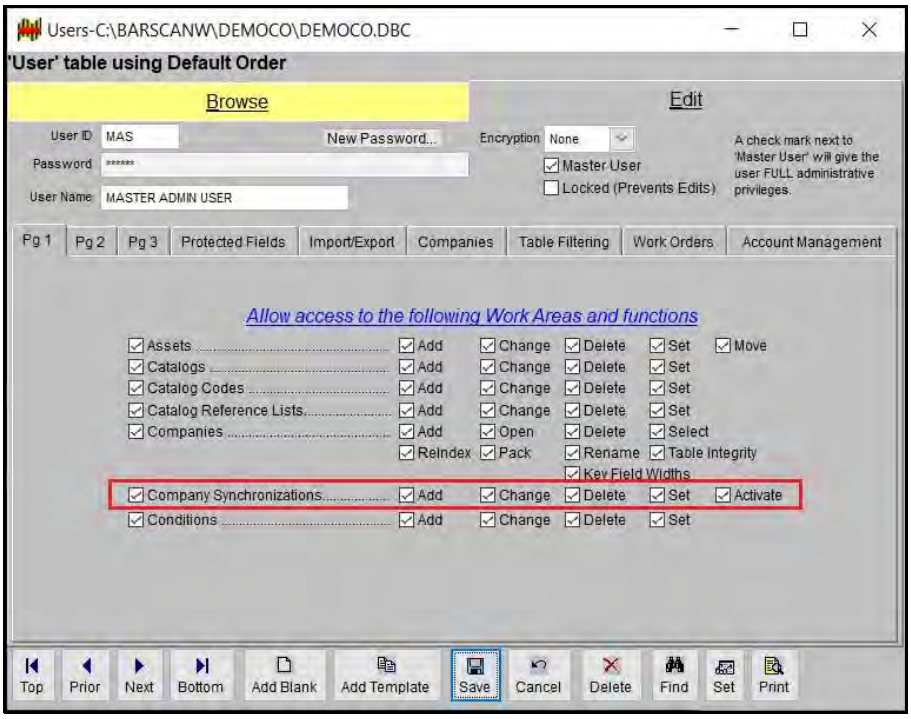
Here are some typical users:

User Role	Items checked ON	Items UNCHECKED
Master User	All	None
Typical PC User	None	All
Typical Handheld Only User	None	All
Synchronization Administrator	All	None
Synchronization Timed Update User	Activate	Add, Change, Delete, Set

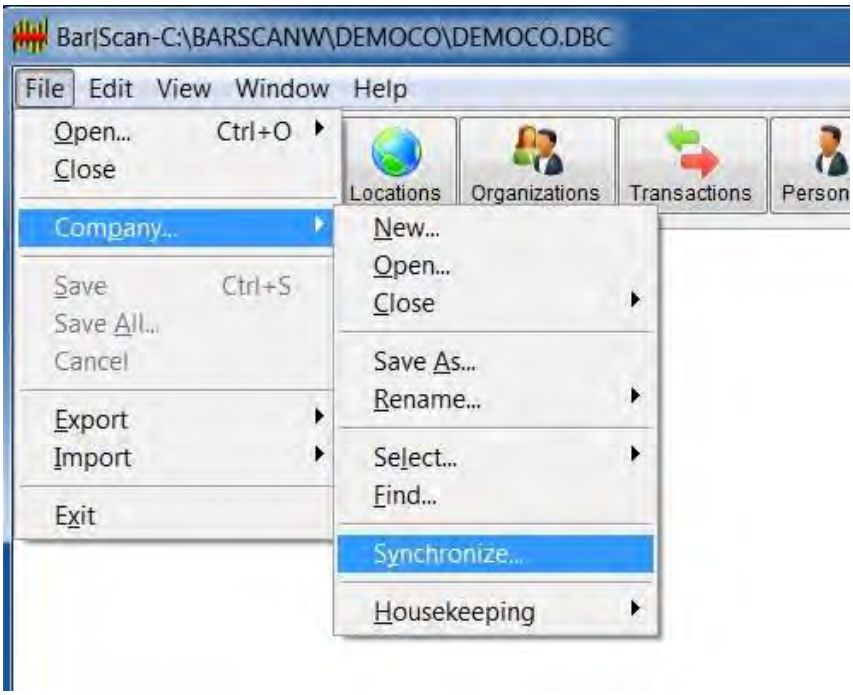
The first recommended typical user is the 'Synchronization Administrator', a user with all synchronization access, able to add, change and deleted synchronizations, as well as send and receive data. This is typical because generally there will be only one user involved in these activities at any particular site.

The second recommended user is the 'Synchronization Timed Update User'. This is not a real user per se, but is generally used when automatic updates are desired on a timed basis by using Windows Task Scheduler. This account is used for logging in to Bar|Scan and performing the synchronization automatically (See the section on how to use the Task Scheduler).

Below is a completed user screen with all synchronization options turned on and accessible by the user. This is typical for the Synchronization Administrator.



Once a user has been allowed access to Company Synchronization, their menu system will change from disallowing to allowing access as shown below.



This menu no longer has the Synchronize item greyed out and is therefore accessible.

Setting Up a Company Synchronization Configuration

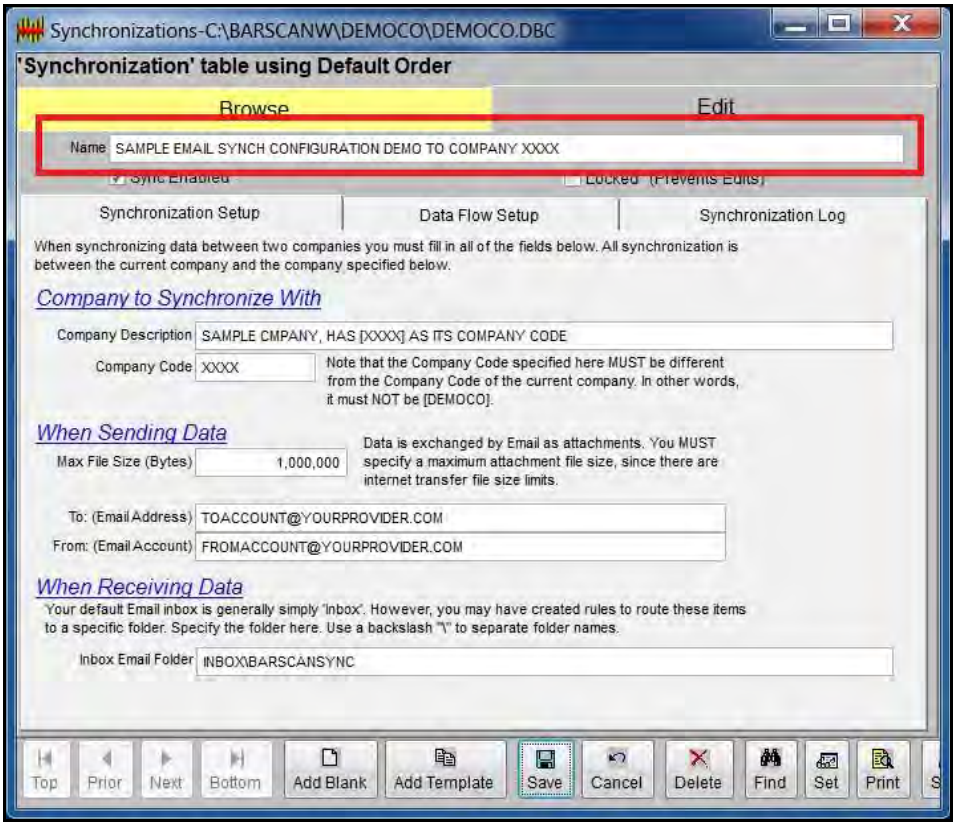
When creating a Company Synchronization configuration, keep in mind that you are configuring how data flows between the currently open company and the target company specified in the configuration. Company Synchronizations should not be shared between companies (such as catalogs might be shared) or else unpredictable results may occur.

The general steps for setting up a new configuration are:

1. Navigate to the Company Synchronization Screen. From the Main Menu select File.. ▸ Company... ▸ Synchronize.

2. Add a new Company Synchronization configuration by selecting 'Add Blank' or 'Add Template'.

3. Give the Company Synchronization configuration a unique name in the 'Name' field. This will be used to identify this particular configuration. See below where a sample descriptive name has been entered.



Important Note: If you are going to automate this synchronization configuration, this is the name that will be used in the '.bini' file to specify which configuration to use. So if you change this name, you must also change it in your related '.bini' file or the automated synchronization will fail.

Next, specify the target company and email accounts (See Synchronization Setup).

Specify which tables will be involved in the data exchange and in what direction the data will flow. Note that data can flow one way or two ways, depending upon the type of synchronization desired (See Data Flow Setup).

Clear all log entries to guarantee the initial data exchange contains all desired data (See Synchronization Log).

Save you work by selecting the 'Save' button.

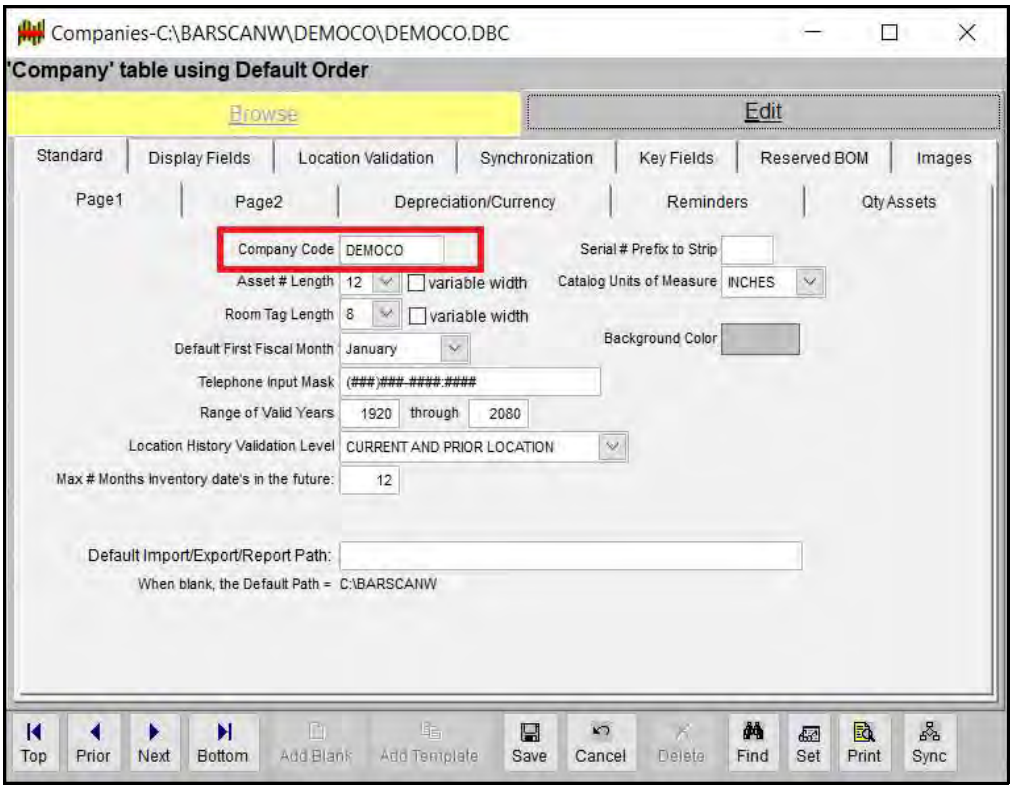
Synchronization Setup

To create a successful Company Synchronization configuration, you must fill in all of the fields within the 'Synchronization Setup' tab. Here are some guidelines in filling in these fields. At the bottom of the list is a sample figure with all of the fields filled in. Do not use the samples; you must determine the values you must use for your own installation.

"Company to Synchronize With" Company Description Field - This is a freeform text field used to describe the company. You can enter a generic description or you can use the lookup function (right click on the field, select 'Look Up Value…') and navigate to the target company on your network, if it is available, and once selected, it will fill in the full company name and path for you.

Of course, if you are using the synchronization functions it is quite likely that your target company will not be available on your network. In either case, we recommend that you use a description that helps you locate the targeted company on your company/worldwide network.

Company Code Field - Enter the actual Company Code of the company that you will be synchronizing with. Note that all companies have a company code and these should be unique to the company. To determine the company codes of any company navigate to the Company Settings screen (File... ▸ Company... ▸ Housekeeping... ▸ Settings) after that company has been selected as the current company. Note the company code displayed in the example below.



If you have access to the targeted company over your network, you can also use the lookup function (in the Company Synchronization screen right click on the Company Code field then select 'Look Up Value…') to navigate to the company on the network, and Bar|Scan will attempt to determine and enter the correct Company Code for you.

“When Sending Data” Max File Size (Bytes) field - If you are not sure about what to enter here, start conservatively with 3,000,000 bytes. This will break up your data transfers into multiple emails, each with a maximum size of about 3 Mb. The larger the number, the fewer emails in each Email set. See below for some of the factors that affect what number should be entered here.

Most email systems have a maximum attachment size. This value is not constant because it depends upon many factors. The most important is the route that the email takes to get to its target. Emails hop from server to server over the internet until they reach the server that services the targeted email account. Each server will have its own maximum attachment size, generally as a set policy of the the servers owner. If the attachment is larger than allowed, the server will reject the email and you may get a ‘not deliverable’ message. The maximum file size is determined by the smallest of these allowed sizes. It may take some testing to determine the maximum size. Note that if you can keep the email within a known service provider (i.e., bother sending and receiving accounts belonging to the same vendor with the email being transferred over its own servers) that will generally give you the largest possible maximum file size. For example, as of this writing Google Gmail allows a maximum attachment size of approximately 25 megabytes (MB).

To: (Email Address) field - Enter the target email address. This is the address at the other site that will receive all of the transferred data from this company.

This is usually an account that has been setup specifically for this purpose at that site. Note that all companies synchronizing with each other, even if the data flow is all one way, will each have a Company Synchronization configuration pointing to the other company. If there is some two way data flow, then it is likely that the ‘To’ and ‘From’ email address of the two configuration will be the same except they will be swapped. The source ‘To’ will be the same as the target’s ‘From’ and vice versa.

Bar|Scan does test for email format. It does not verify that the email accounts are actually valid.

From: (Email Address) - Enter the address that you want to use as the source of the emails. Usually this is an email account that has been specifically setup for this purpose.

Bar|Scan does test for email format. It does not verify that the email accounts are actually valid. See the note under 'To' above for some further guidelines.

Important: With recent security updates from Microsoft, the ability to specify the 'From' email address within Outlook has been restricted. No matter what email address is entered into this field, Outlook will only use the default Outlook email address for outgoing email generated by Bar|Scan. Additionally, if you are using both Outlook and Microsoft Exchange, Exchange specifies the value of this default email account upon the user logging in. So if you decide that the receiving Bar|Scan installation has a requirement that it receive emails from a specific account (this is not recommended by the way) then you will have to setup unique logins for each desired account. Generally this would be used when using automated synchronization using the Windows Task scheduler.

"When Receiving Data" - Inbox Email Folder Field - Enter the INBOX folder in your Outlook client where Bar|Scan should look for incoming emails for data coming into this company.

Microsoft Outlook allows the creation of folders within its INBOX, as well as allowing the creation of rules to determine what folder receives what incoming mail. A typical outlook user has several different folders that receive e-mail. In this field you specify the exact folder that you have designated to hold Bar|Scan incoming data for this company. In the example we have been using, data is flowing between company DEMOCO and XXX. An example Outlook email folder designed to accept incoming data may be 'INBOX\XXX-Incoming'. You would have to create this folder as well as create a rule to redirect Bar|Scan data to this folder when it comes in.

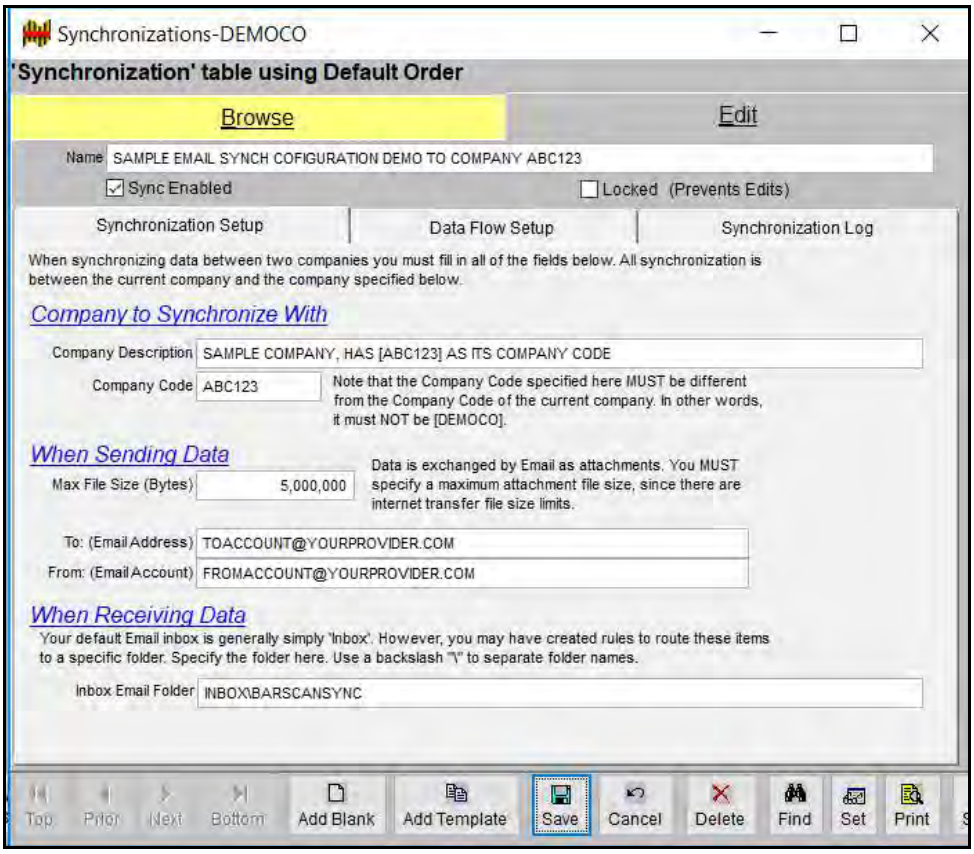
If you have no subfolders, you can accept the default value of ‘INBOX’ and Bar|Scan will look for incoming data there.

Technical Note: Microsoft Outlook can have several Personal Folder Files (with extension .PST) active simultaneously. Additionally, it can also pick up e-mail for several email accounts as well. Each email account has a default folder that serves as its ‘inbox’.

In Outlook 2016 a custom folder can be set by selecting ‘Tools/Account Settings…’, then selecting the ‘Email’ tab, then clicking on the ‘Change Folder’ button. This button changes the default delivery location for the highlighted email account. This does not have to be the actual ‘Inbox’ folder for each Personal Folder File, but it is by default. If you have specified a folder different from ‘Inbox’ as your default delivery location, then you must use that folder name as the basis for specifying the folder that Bar|Scan will look in.

For example, if you have specified the folder ‘CustomInbox’ as your delivery folder instead of the default ‘Inbox’ folder name and one of your rules redirects Bar|Scan to one of its subfolder, .e.g. ‘CustomBarScanIncoming’ then the path specified should be ‘CustomInbox\CustomBarScanIncoming’.

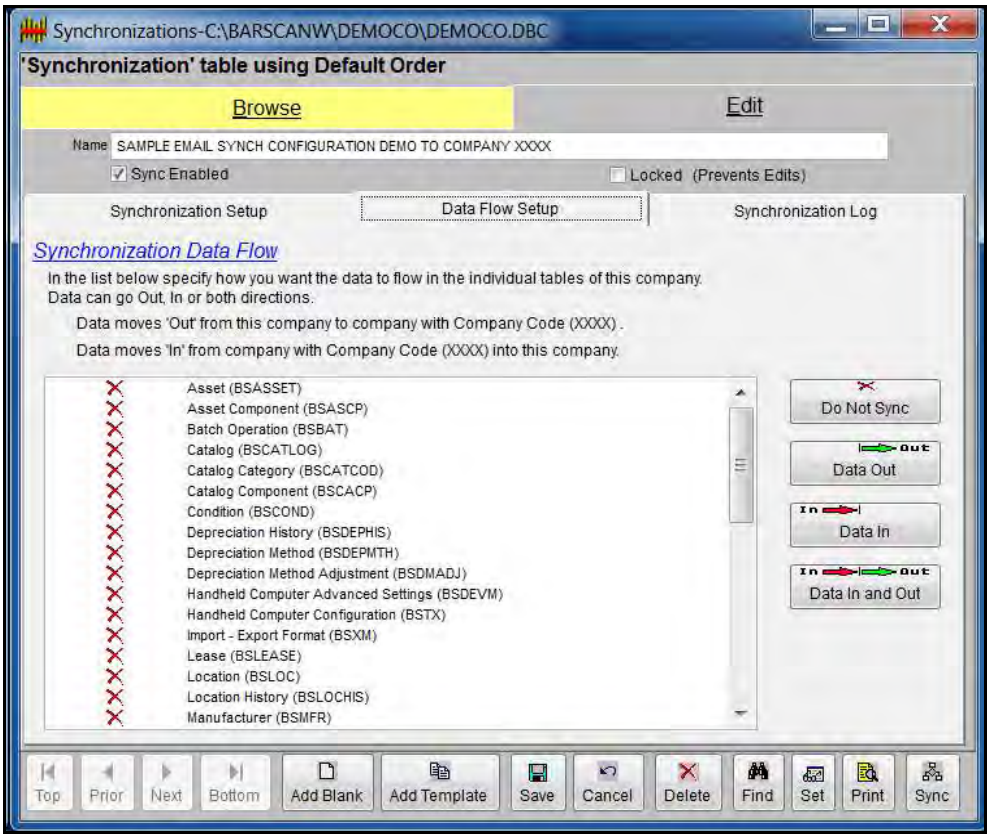
Below is a sample figure with all of the fields filled in. Do not use these actual values; you must determine the correct ones for your installation.



Data Flow Setup

Bar|Scan allows you to control which of its tables participate in the synchronization of data between companies. The 'Data Flow Setup' page is where you specify two things: what data gets moved and what direction it goes.

You are presented with a list of available tables. Some tables are grouped together automatically. In other words, if you assign a data flow, related tables will automatically be assigned the same flow. Below you can see a sample screen where no tables have yet been selected.



The idea is simple. First select the table and then click on the button on the right that controls how you want data to flow for that table. If you want data only to be sent out from the current company, click on the 'Data Out' button. If you only want data coming in, click on the 'Data In' button. If you want data going both ways, select the 'Data in and Out' button.

Here are a few things to keep in mind.

Some tables are automatically linked, so they will always have exactly the same data flow. For example, the Asset and Location History tables are linked. If you want one, you must accept the others.

Some tables, although not linked, should, under most circumstances be grouped together. The reason they are not linked automatically is that there ARE circumstances where they are not needed. Here is a list of highly suggested groupings. Unless you are aware of a reason not to select any of these related tables, it is suggested that you include them all together. Note also that this list may change with time and is not exclusive. Finally, you will note that the CATALOG table is in two groups, but not all of one is in the other. Here is a circumstance where the intent of the synchronization comes into play. If you are emphasizing the synchronization of assets, select the group in 'A' below. If you are emphasizing Catalogs without assets, select the group in 'B' below.

A Group - If you select ANY in this group strongly consider including all of the others:

Asset / Catalog / Condition / Manufacturer / Organization / Status

B Group - If you select ANY in this group strongly consider including all of the others:

Catalog / Catalog Category / Depreciation Method / Manufacturer

C Group - If you select ANY in this group strongly consider including all of the others:

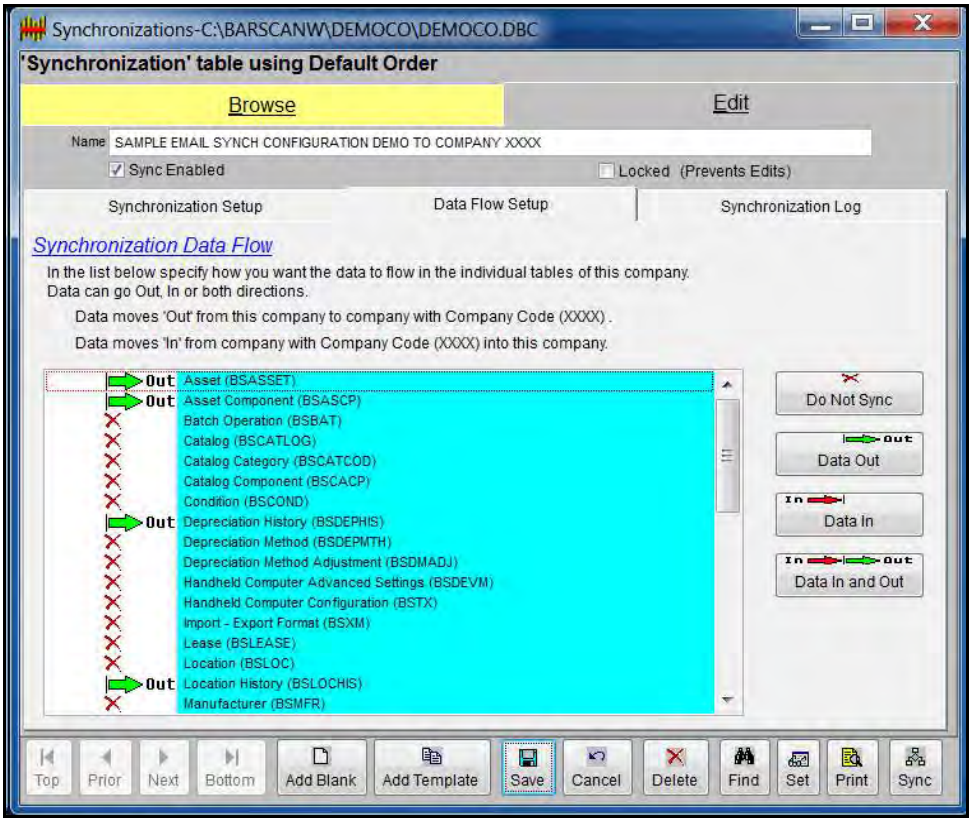
Handheld Computer / Handheld Computer Configuration

If a table is going to be included in the synchronization list, with data flowing either IN or OUT, it must have LOGGING enabled for that table. See the section in the Bar|Scan User manual on how to setup logging for a table. In short, you must enable logging in the 'Table Properties' screen, exit Bar|Scan, login again, and then do a Restructure to create the log tables. Bar|Scan will check this when you try to save your Company Synchronization configuration. If you must make modifications you will see a message similar to that found in The image below.

VERY IMPORTANT: When setting up logging for the specified tables, make sure that you select ALL logging actions: Adds, Deletions, Changes, and 'All Fields'. Not doing so will prevent the Company Synchronization from working properly.

You will be able to save the invalid Company Synchronization configuration if you are not ranging and the 'Sync Enabled' field is UNCHECKED. Until you fix the problems you will not be able to put a check mark on the 'Sync Enabled' field.

Most situations do not require a wholesale copy of all data back and forth between companies. For example, a common scenario is where several independent Bar|Scan installations have been installed in several locations around the world, each managing the assets at their own location. However, corporate headquarters wants to create some reports incorporating all of the data from all installations. There are a few ways this can be done, but one way is to do a one-way synchronization of asset related data from each of the Bar|Scan locations to a roll up company at headquarters, where a report is printed of the merged data. In this situation, the Company Synchronization configuration may have a limited set of tables involved, all going 'Out'. Note the setup shown on below.



The only data they are interested in is the data that will show up in their reports. Data flow is one way, and most of the tables related to the Asset table are not included, such as the 'Status' table, as the code itself in the asset table is sufficient in the report.

Under most circumstances it is recommended that you do NOT include the following tables in your Company Synchronization configurations unless you have a compelling reason to do so and have considered the consequences. Generally, the only time these tables may be allowed to be included is if the target company is a one way (out) and it is for reporting purposes only.

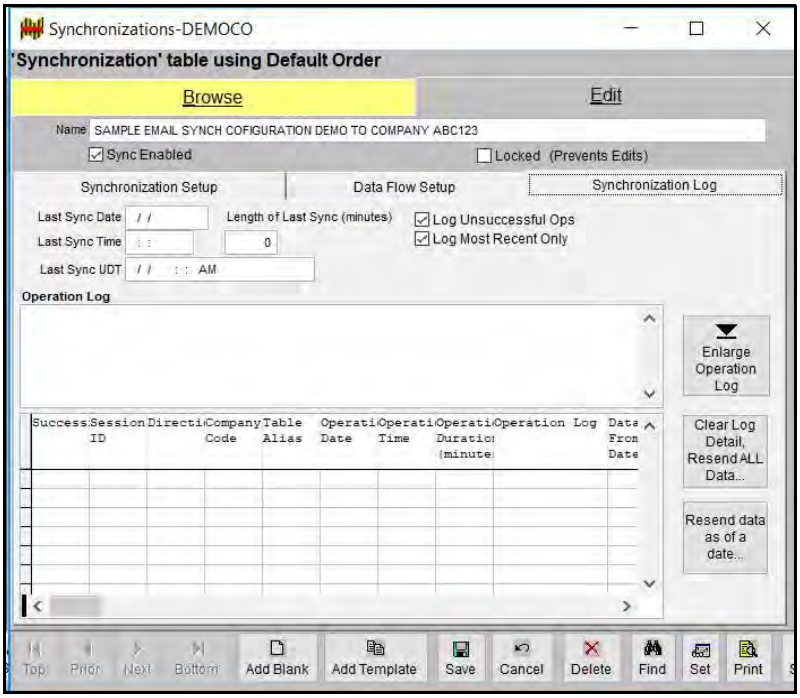
User Table. Sharing the user table essentially allows all installations to see, change and even delete users at any other installation. This is generally not acceptable!

Transaction Table. Transactions are generally local to the installation, have not been vetted as accurate or even valid. Sharing these will generally create a lot of confusion when 'mysterious' transactions begin showing up.

Synchronization and Synchronization History. Including these may cause problems for the Synchronization itself.

Synchronization Log

The 'Synchronization Log' tab contains information that performs two functions. First, it is a record of the data flow available for reporting purposes. It can be printed using the Bar|Scan reporting functions. Second, it is used during the synchronization process itself to help determine what data to send to the target company, so that not all data has to be sent with every transmission. Below you can see a sample one-way transmission of essential asset data contained in DEMOCO.



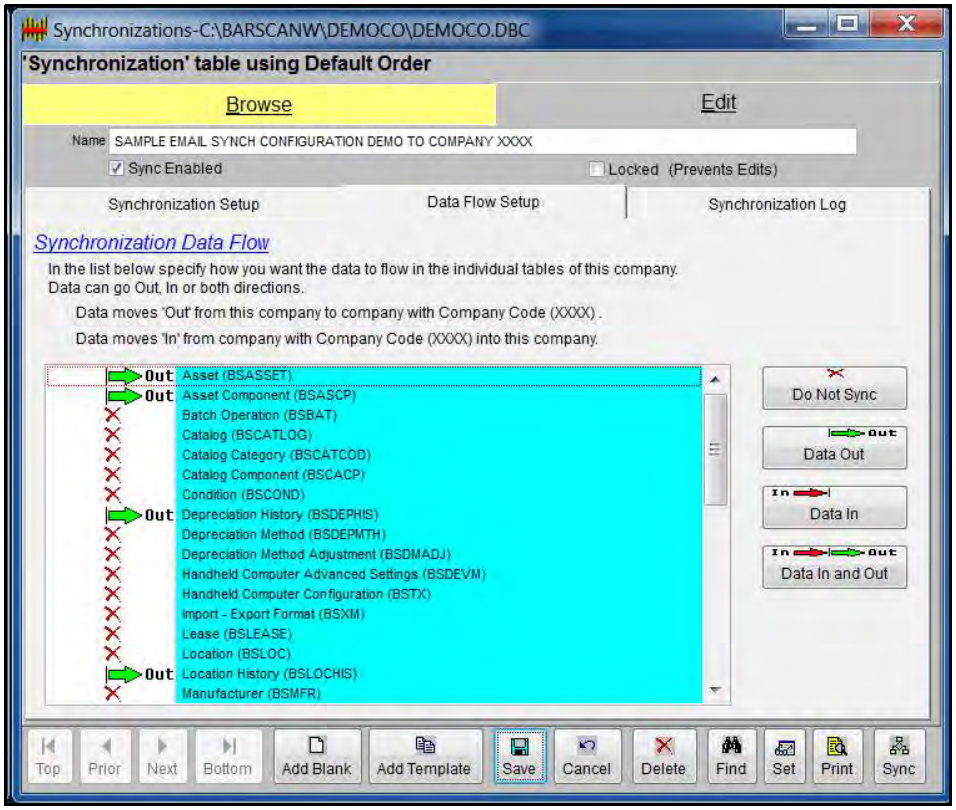
The most recent successful sync of each table will always stay in the log history list. Also, if 'Log Unsuccessful Ops' is checked, line entries for unsuccessful operations will also be added if they occur. When this is checked, no 'unsuccessful' entries are added, for a sync, and there are no messages in the 'Operation Log' field, then it was successfully completed.

Important: the most recent synchronization might not have been successful just because there is a 'successful' entry for a table in the log. It is very important to check the date and time, because that is what tells you when the last successful synchronization occurred. You will only see unsuccessful synchronizations by checking the 'Operations Log' field for messages. When a successful synchronization occurs, this field will be blank.

If 'Log Most Recent Only' is checked, the log entries will only show the most recent successful sync as mentioned above. If this option is 'checked', whenever a sync is done it purges old log entries and add new entries for the current sync. If this item is UNCHECKED, it will not purge and will keep accumulating history.

Over time, the Synchronization Log may contain thousands of records of history since every sync operation will add a set of entries matching the number of tables being synced. If you choose to keep this history, we recommend that it be reviewed and cleared on a regular basis by putting a check mark next to 'Log Most Recent Only' and performing a manual synchronization, then performing a Company Housekeeping 'Pack' operation only on the specific table 'Synchronization History'. You may be tempted to press the 'Clear Entries' button, but this is not recommended for this purpose. If you press the 'Clear Entries' button it will clear all of the log entries but it will also send ALL of the company data across on the next synchronization.

This transmission corresponds to the following Data Flow Setup.



Note that each line in the log corresponds to an operation on a given table. It records the table alias, when the In/Out operations took place, how long they took and what kind of changes resulted. It also lets you know the 'Part Count', i.e., how many parts the data had to be broken up to fit the email file size limit.

There are some options and operations that can be performed from this page.

1. Log Unsuccessful Ops (a checkbox). This is checked ON by default. If unchecked, you will not see any unsuccessful synchronization operations. This is generally not recommended.

2. Log Most Recent Only (a checkbox). The log list can continue to accumulate entries for each attempted synchronization or it can be set to keep only the results of the last relevant attempt. Unless you have a specific need, this value is checked ON by default.

3. Clear Entries button. Clicking this button will cause a prompt to clear all of the Synchronization Log entries. The result of this is two-fold. First, there is no longer any log history of any past synchronization attempts. This is desirable if you have been accumulating a synchronization log history (by having 'Log Most Recent Only' unchecked and want to delete a log that is growing too big.) Second, it forces the next transmission of data to include ALL data in the current tables that are participating in the synchronization. This is necessary since Bar|Scan no longer knows the success or failure of any past synchronization.

If you do not want to resend all of the data in all tables selected for outgoing synchronization, then do not use this button but put a check mark next to 'Log Most Recent Only' and performing a manual synchronization, then performing a Company Housekeeping 'Pack' operation on the table 'Synchronization History'.

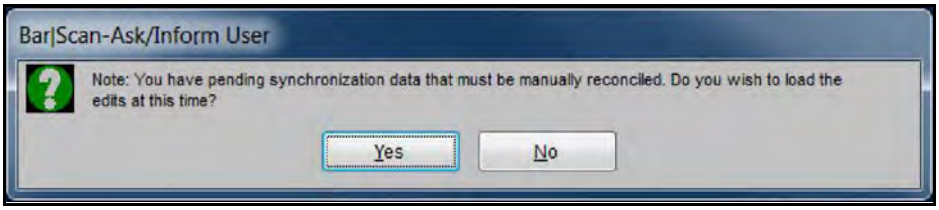
Reconciling Synchronization Data Conflicts

On occasion, edits will be made to the same fields within the same tables within the working companies. For example, the same asset has information entered into the Remark field in both companies. Bar|Scan does not determine which edits take priority, rather, the user will need to decide which edit takes priority.

After a synchronization is completed, these types of data conflicts can occur if the same fields are edited in both companies.

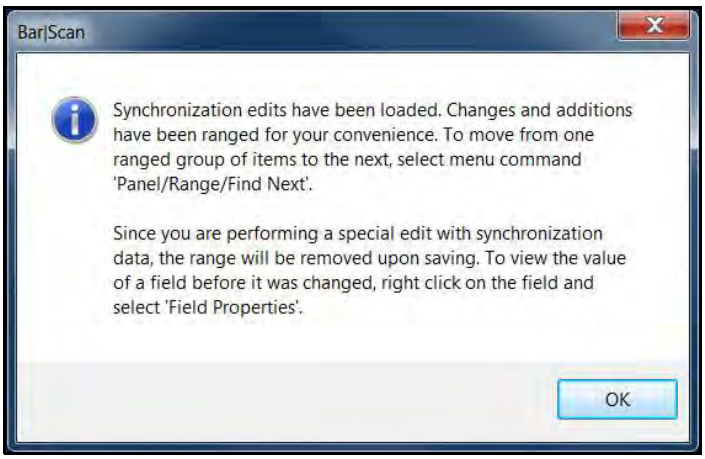
If these data conflicts are occurring often, this can be alleviated by synchronizing the working companies more frequently.

In any case, when synchronization data conflicts occur, a message will be displayed when the Table is opened as shown below:



As the message states, you can choose to open the Table with the pending edits, or reply 'No' to open the Table without the pending edits. If you reply 'No', the pending edits will remain in the queue for editing the next time you open the table, they are not abandoned.

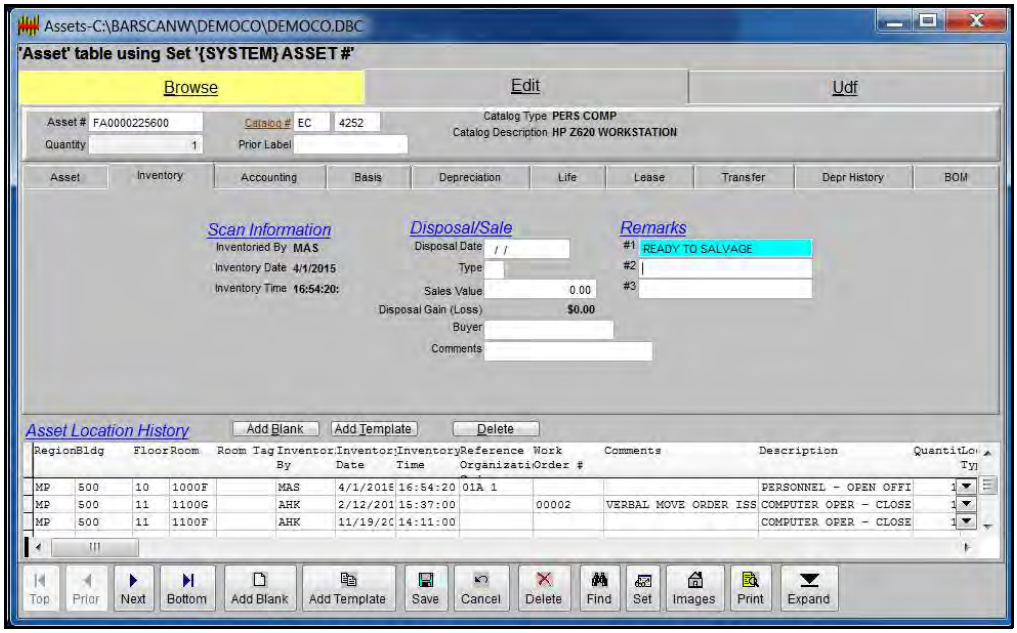
If you reply 'Yes' to open the Table with the pending edits, you will be presented with the following screen.



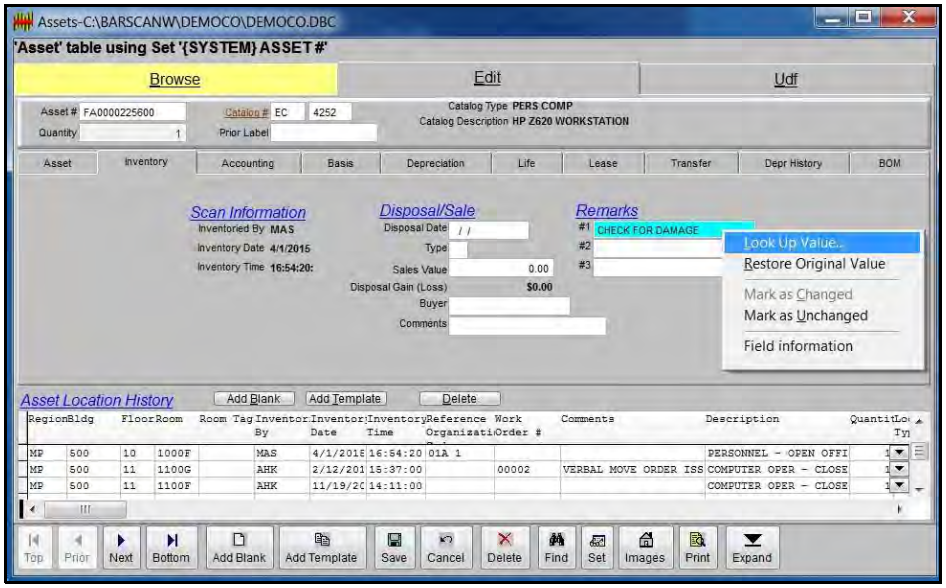
As stated in the message above, the synchronization edits have been placed into the Table. Changes and additions have been ranged so the you can move quickly through them by using the Panel...▸ Range...▸ Find Next Command. Here is an example of a Ranged Asset that requires a review and edit.

Keep in mind that the Find Next Command looks for the next Range from the record that you are on, not the next item within the current range. For example, assume you have 5 assets that have changed, three at the top and two at the bottom with several thousand unchanged assets in between. If you look carefully, you will see that the top three have been ranged. Also, the bottom two have been ranged. There is a large unranged gap in-between. If you are on the first asset at the top and then select the 'Find Next' command, you will move to the top of the bottom range, not the second asset. Also, it does not search for Ranges above the cursor. So, it is always best to use the First Item Icon before beginning your search for Ranges.

Unless the field that requires the edit is displayed as a column on your Browse Panel, you will need to click on the Edit Tab to see which field requires attention.



In this case, the Remarks #1 field has a pending edit. This edit is the one performed on the *other company, not yours.* You can now decide to keep the new edit by making no changes and moving on to the next item, or abandoning it by selecting the 'Restore Original Value' pop-up menu item.

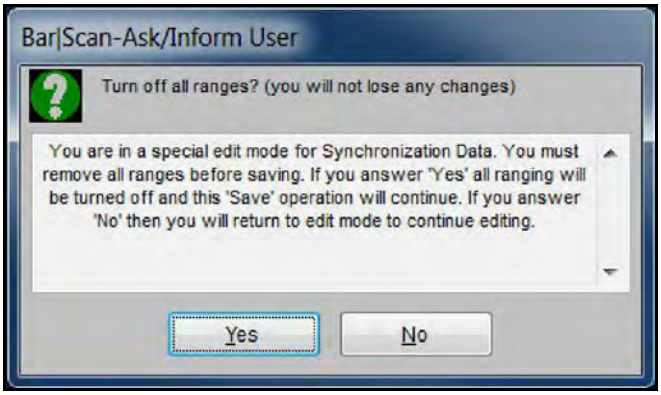


To see what information was in the Remark #1 field prior to the synchronization, right Click on the Field as shown above and select 'Field information'.

As you can see from the above panel, the item ‘Old Value’ contains the prior information. In this case, the Remark #1 field contained the text ‘Ready to Salvage’.

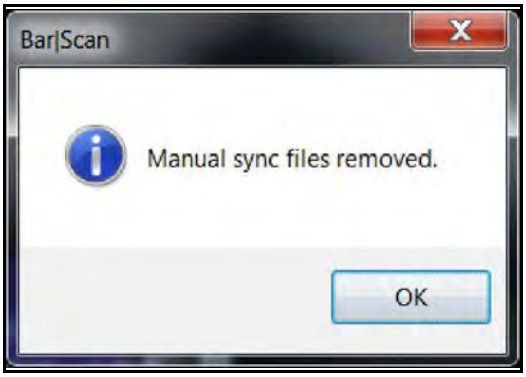
If you wish to keep the prior information use the ‘Restore Original Value’ choice. The ‘Restore Original Value’ choice will undo only the edit to the single field.

When you save your edits, you will be presented with the following screen. Respond ‘Yes’ only if you have completed all of your edits.



This confirmation message states that it will clear all ranges. If there have been many items (such as Assets) changed, then likely there will be many ranges as well. Other than clearing all ranges first, the Save button works exactly the same as a regular ‘Save’. Since all ranges are cleared automatically prior to saving, you cannot copy values from one item to another by using a range. When you say ‘Yes’ to this verification screen, Bar|Scan will turn off all of the ranging (so that nothing get accidentally copied from one record to any others) and then it will save all of the edits you have done on each individual item. If you should manually turn off ranging, you will still get this message as a reminder that you are in the special edit mode for synchronization.

Once the Synchronzation values have been saved, you will get a confirmation message telling you that the Manual Sync files have been removed also. In short, after the manual Synchronziation changes have been saved, there is no longer any need for them in the SYNC folder, where they have been stored until now. The message is telling you that it was able to successfully remove them. If for any reason it cannot remove these files, it will also inform you of this fact as seen below.



Manual Synchronization Conflicts

The process below is only necessary when Bar|Scan identifies that there are synchronization conflicts.

Begin by logging in as a Master User. A Master User log in is required to do a manual synchronization reconciliation. This is because important decisions about data may have to be made that might not be in the job scope of a Non-Master User.

Remember that a Master User login is not required to perform the automatic synchronization operation.

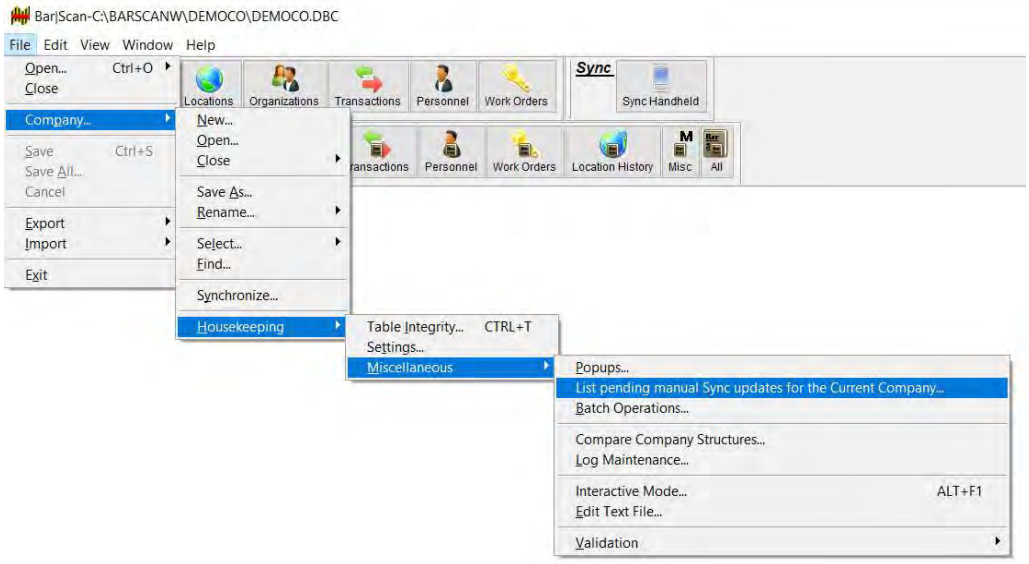
After a manual synchronization is completed in the Sync screen use the menu option to list Pending Manual Sync Updates for the Current Company. This will tell you where manual updates are needed.

For convenience, the manual synchronization conflicts can also be accessed from the Housekeeping Menu.

When updates come in using the synchronization, the user does not know which screens may have manual updates unless they examine the synchronization log.

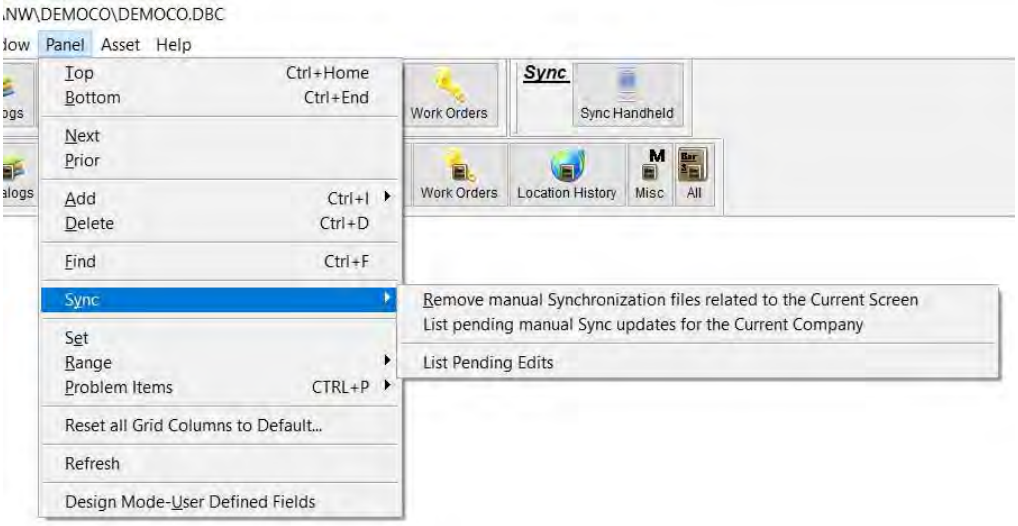
Even then, the log may not have all of the pending updates, since one of the options for the log is to keep only the most recent entries. So if the user wants to know what screens they have to make manual edits on, they need a list. This lists the manual sync screens that need attention. These are also what might be called conflicts. But also may include any complementary changes from other fields that changed prior to the most recent edits of any particular record.

As shown below, after a manual synchronization is completed in the Sync screen (File-> Company-> Synchronization), use the menu option File-> Company-> Housekeeping-> Miscellaneous-> List Pending Manual Sync Updates for the Current Company. This will tell you where manual updates are needed.



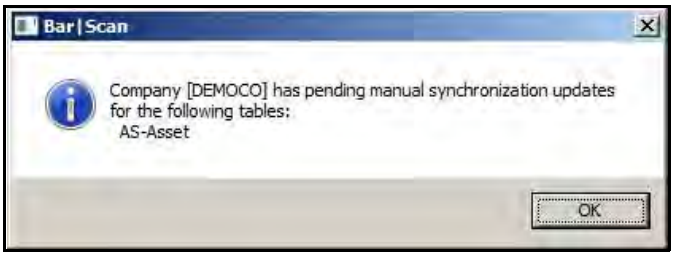
The ‘Panel’ Sync menu item will appear when you have a Screen Open. It performs the same function as the Housekeeping Syc Pending described on the previous page, but is more easily accessible when doing edits.

From the Main Menu select Panel-> Sync-> List Pending Manual Sync Updates for the Current Company as shown below.



List Pending Manual Sync Updates

Bar|Scan will inform you which Tables have pending manual synchronization updates that you will have to apply. As shown in the example below, there are pending updates in the Asset Table.



Open each of the Tables listed that need manual reconciliation. In this example, open the Asset Table.

Bar|Scan will load all of the changes that apply to the Asset Table including location history. Reply 'All' when asked what to information to load. Bar|Scan may actually determine there is nothing to load.

Most of these reconciliations will be 'old' data. That is NOT BAD data, just data that was entered before the most recent entries. For example, if someone changes the catalog one day, sends it to you, but in the mean time you have changed the manufacturer's part number. The catalog change will be 'old' data that needs to be applied.

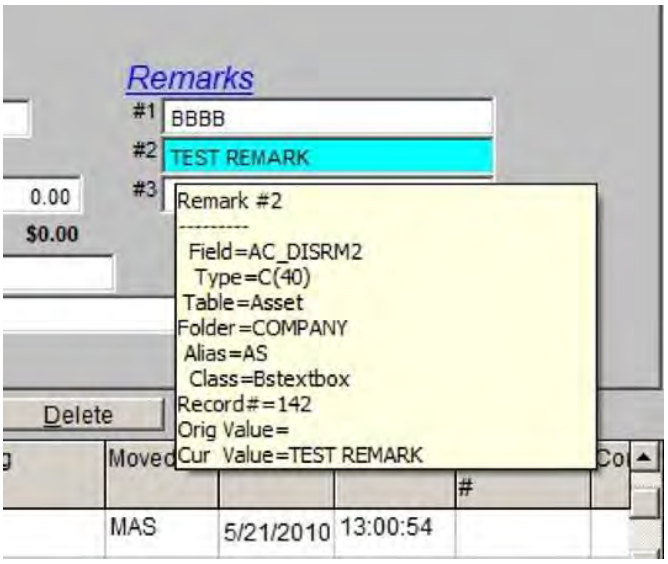
Do the pending edits to the Table carefully. Review each edit and determine which ones should be saved. Do not just accept all edits and press save unless you are sure that the current database's edits take priority over the other database(s).

If you complete the edits and save the information, then the manual synchronization files will be deleted by Bar|Scan.

If you decide to cancel the edits, the manual synchronization files will be saved and reloaded next time you open the Table.

Look for Pending Edits

When in sync mode, holding the mouse over a field with pending synchronization edits will display the information before the synchronization and the pending values if it has changed. No need to click first.



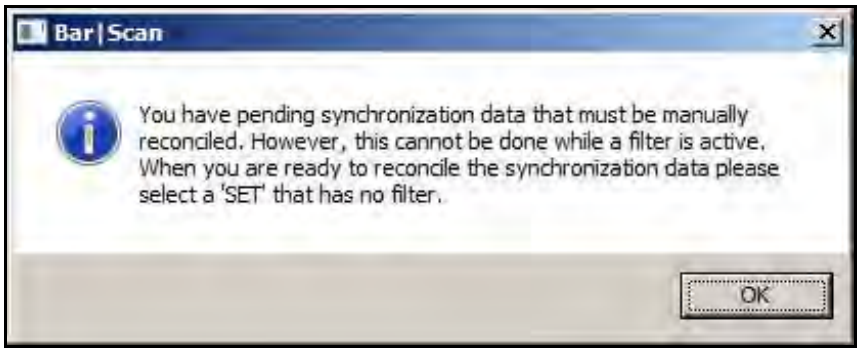
'Cur value' is the colored value seen on the screen. 'Orig Value' is its original value, what it was before the sync edits were applied. The 'Orig value' has been written over and is not currently visible. It can be returned by right clicking on the field and selecting 'Restore Original Value'.

Do the pending edits to the Table carefully. Review each edit and determine which ones should be saved.

Set Commands Are Not Compatible with Sync Edits

If a Table has a SET Command applied with a Filter, then Bar|Scan will not load manual synchronization files. This is to prevent filtered reconciliation errors. However, if you attempt to load the manual synchronization files, Bar|Scan warns you that you have a filtered SET Command.

In other words, if there are pending sync edits and the user opens a screen that has a filter in its SET, a message stating to select a SET without any filters as in the example screen below.

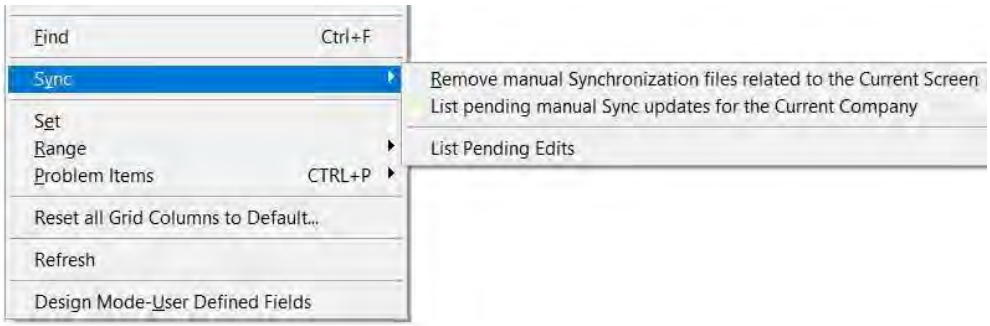


Reports can be synchronized like any other data. However, you must select the 'All Reports' icon and then choose the report. This be because the other kinds of reports, e.g. Asset, Location, etc. are actually filtered lists based on different work areas.

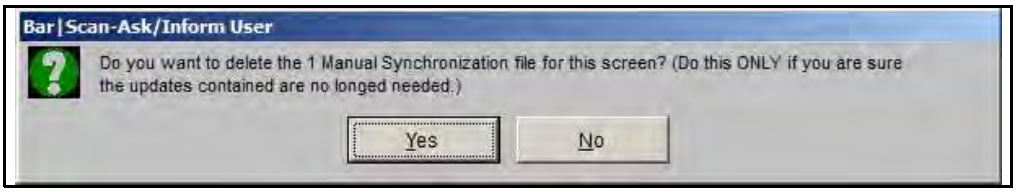
Remove Manual Synchronization Files

The 'Panel' Sync menu item will appear when you have a Screen Open. It can also be used to remove Manual Synchronization files. This allows you to remove the Sync Files manually if they were created only for testing, sent to the wrong email address, or other mistakes.

From the Main Menu select Panel-> Sync-> remove manual Synchronization files related to the Current Screen as shown below.



You will then be presented with the screen below.



Respond YES if you are sure that you wish to delete the files.

The other way for the sync updates to be removed is to load them, then save the edits. This assumes that the number of edits is small.

For Advanced Users: The pending Sync Files are located in the SYNC folder. You can also do it outside of Bar|Scan within windows by manually deleting files in the Sync folder.) This option is especially valuable if someone accidentally reloads an old set of Sync files and the user knows it. It still must be used with care though. It should only be used when the user is SURE that it is ok to delete them. Only master users have access.

Setting up Automatic Company Synchronization

Bar|Scan can be synchronized on a timed basis by using the Windows Task Scheduler. To do so the Bar|Scan administrator must understand several concepts.

1. How to use and set up a working Bar|Scan initialization file.

2. How to use and set up Windows Task Scheduler to run Bar|Scan.

How to Set-Up the Bar|Scan Initialization File (.bini)

".Bini" files (Bar|Scan Initialization Files) are explained in detail in the Tip/Hint entitled "Scripting Feature in Bar|Scan". These text based script files allow Bar|Scan commands to be executed when Bar|Scan starts up. The 'SYNC' command is one of these commands. It causes the execution of one of the Company Synchronization configurations. A sample of simplest possible .bini file that on startup will login, open the desired company, run the desired Company Synchronization configuration, then shutdown is provided in the Knowledge Base portion of the Bar|Scan website at www.barscan.com

Where should the .bini file be placed?

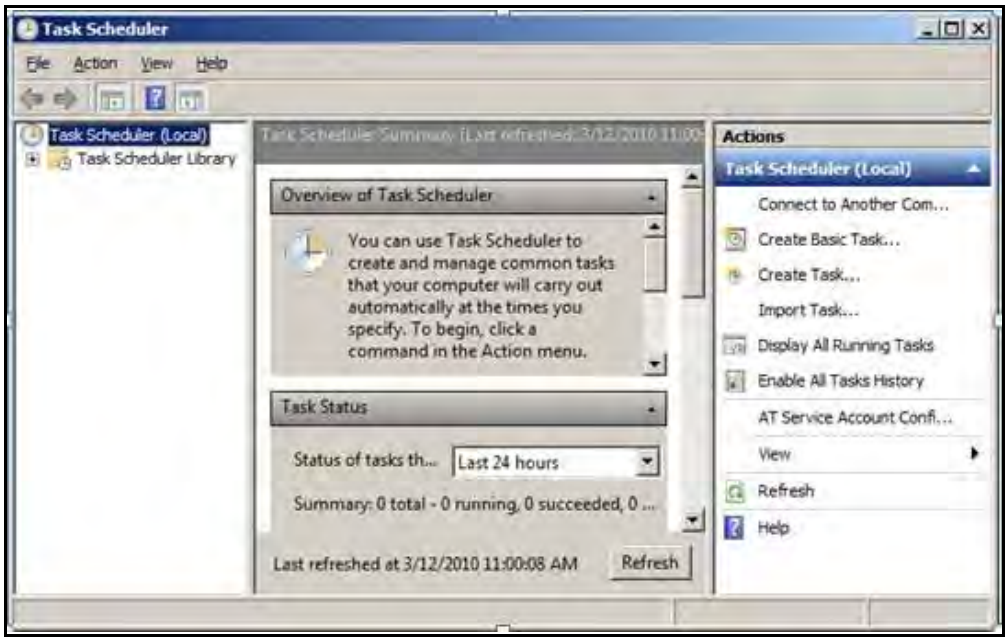
The .bini file can be placed anywhere accessible by the Windows Task Scheduler and by specifying a full path accessible by Bar|Scan. However, it does make technical support easier if they are in one of the Bar|Scan folders. Try to keep them together in the same folder, giving them different names depending upon their function, but keeping the .bini extension. For example, perhaps you make a special subfolder called 'Scripting' and put there all of your .bini files. For example, if you have two companies you are syncing with you may have:

SyncDemocoToXXX.bini

SyncDemocoToYYY.bini

Setting Up Windows Task Scheduler

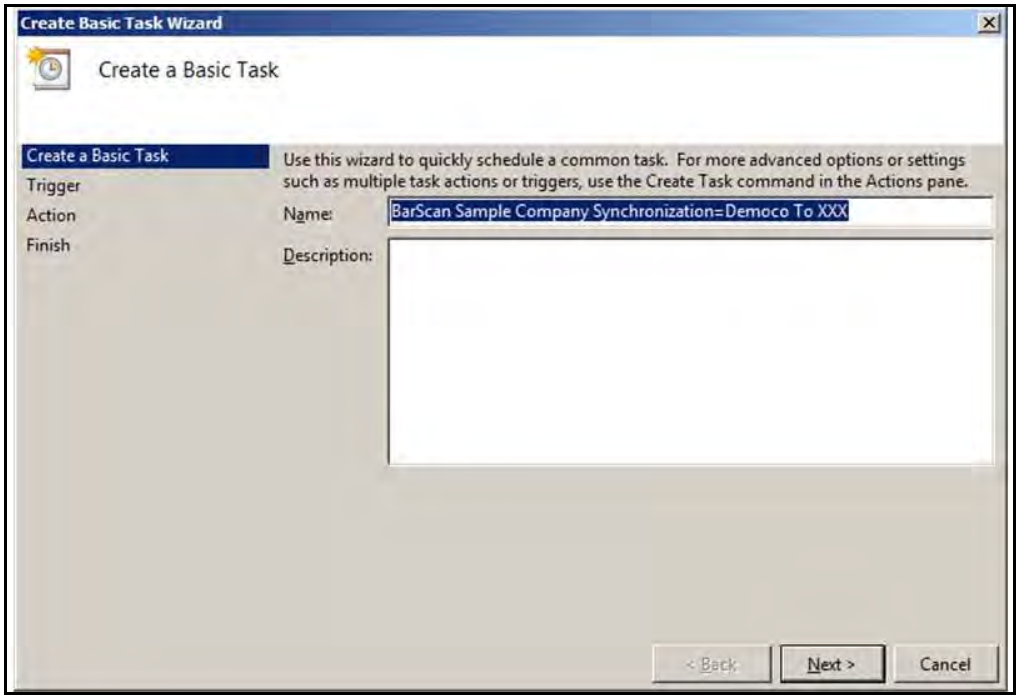
Within Windows Control Panel, Administrative Tools you will find the 'Task Scheduler' applet. Once you activate this you will get a screen similar that shown below.



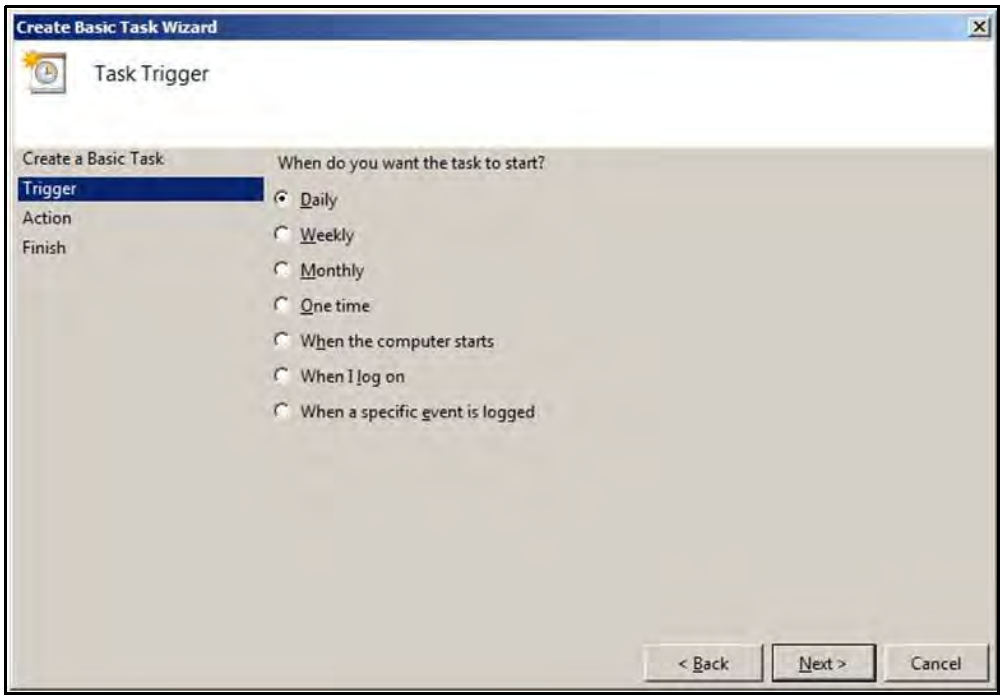
To create a scheduled task to run the Company Synchronization, perform the following steps:

1. Click on the 'Create Basic Task…" option in the Actions list, or select from the menu Action/Create Basic Task…

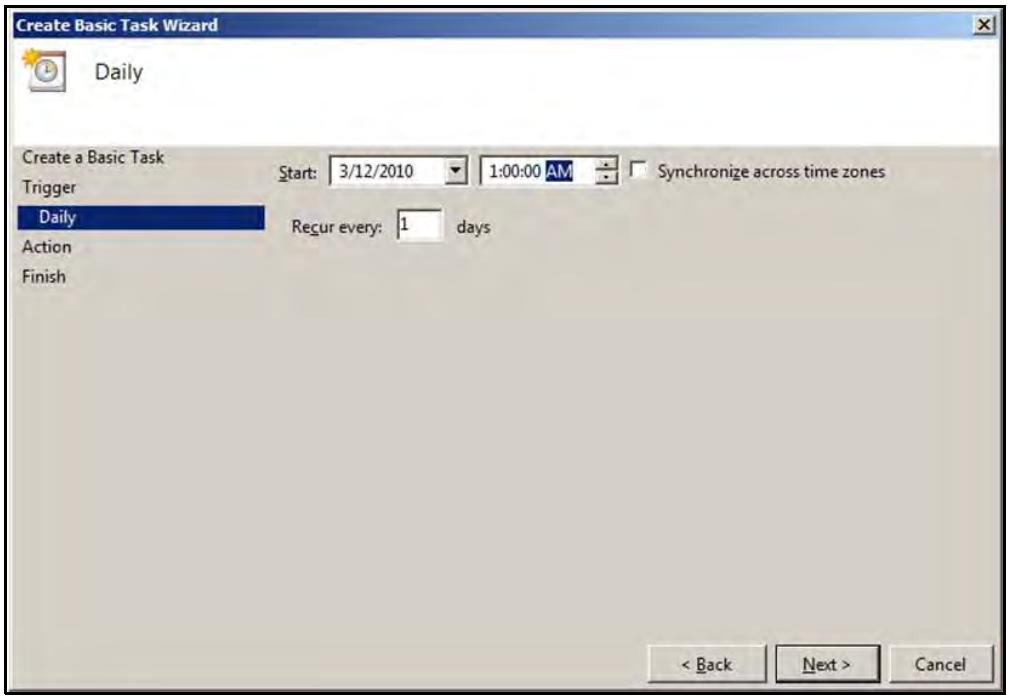
2. You will start the ‘Create Basic Task’ Wizard. Fill in the ‘Name’. Give it anything desired that you will understand when picking it out of a list of other scheduled tasks. In this sample we give it the name “BarScan Sample Company Synchronization=Democo To XXX”, then click on ‘Next’.



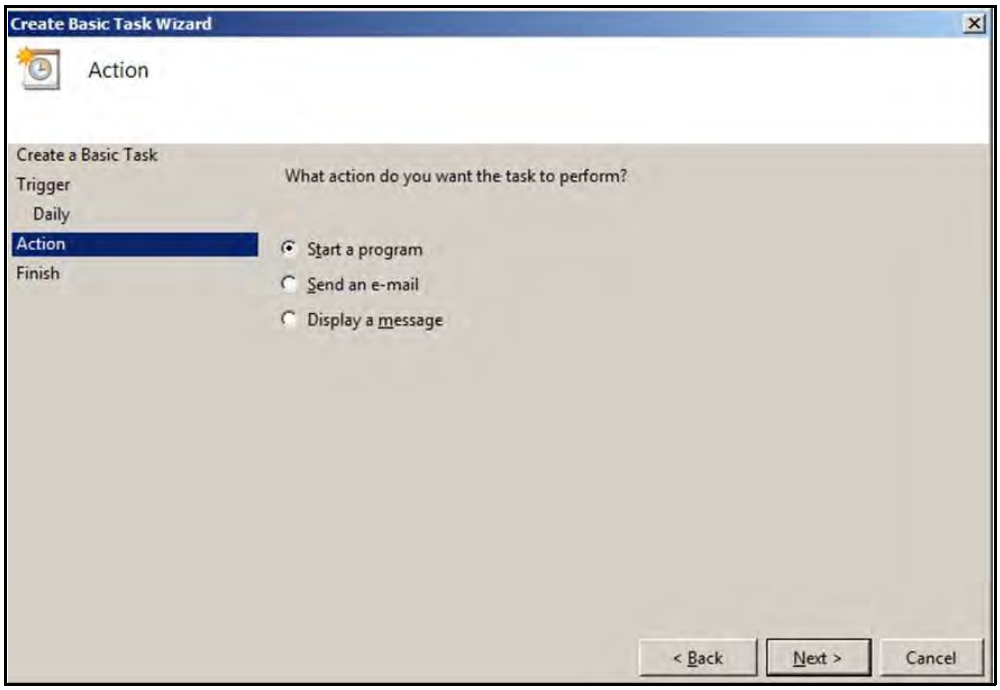
3. Select how often we want to do the Company Synchronization. In this case we select ‘Daily’. When completed, click on ‘Next’.



4. Now select when the task should be triggered. Since we have selected daily, it will be triggered at the same time every day. In this example we are starting it at 1 am every night. When completed, click on ‘Next’.



5. We want to start Bar|Scan, so select ‘Start a program’. When completed, click on ‘Next’.



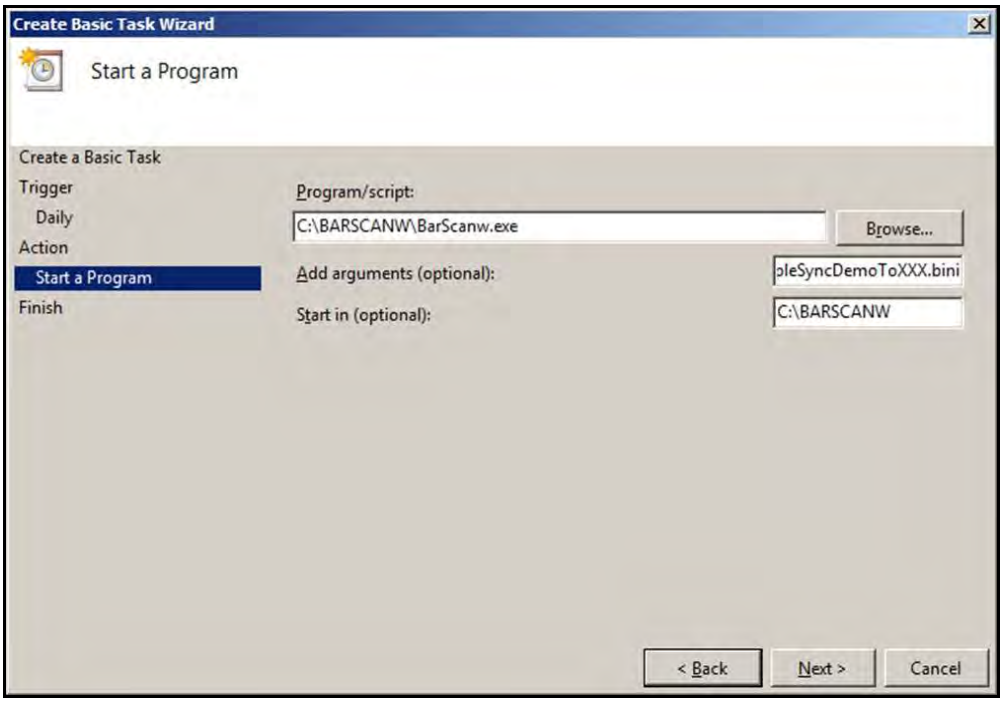
6. Now enter the Program, the path to the .bini file, and the root folder of the Bar|Scan executable. Note that you need to specify the full path of both the program and .bini file. The ‘Start In’ location MUST be entered. It is the folder where the ‘Program’ is located.

a. Program C:\BARSCANW\BARSCANW.EXE

b. Add arguments C:\BARSCANW\SampleSyncDemoToXXX.bini

c. Start In C:\BARSCANW

Note that the wizard may cut of some of the viewable portion to the right of the field, but it will still use all of the characters entered. Note what it looks like below.



When completed, click on ‘Next’.

7. Click on ‘Finish’ at the final dialog. This default setup is basic. It will run as long as the user is logged in at the time that the Synchronization was scheduled. Note that there are some more advanced options available, such as automatic login, what Windows User account to use, even turning on a computer to run the task if it is off at the scheduled time. Please consult your in-house technical support and the Task Scheduler documentation for implementing some of these options.

Some Notes on Email Usage

Note that data is sent in groups of emails. Bar|Scan attempts to minimize the number of emails sent, but is limited by the maximum attachment size. When data is incoming, Bar|Scan will not load a partial set of emails. It will wait until it finds all of the emails in a set, then load them all at once. Once it has done this it will trigger the status of the emails and mark them as 'Read'. Emails that have a status of 'Unread' are considered, whereas if it is marked as 'Read' it is ignored by Bar|Scan. Be careful to not accidentally mark an unloaded email in a set as 'Read' or else the whole set will never get read.

What is Available for Reports

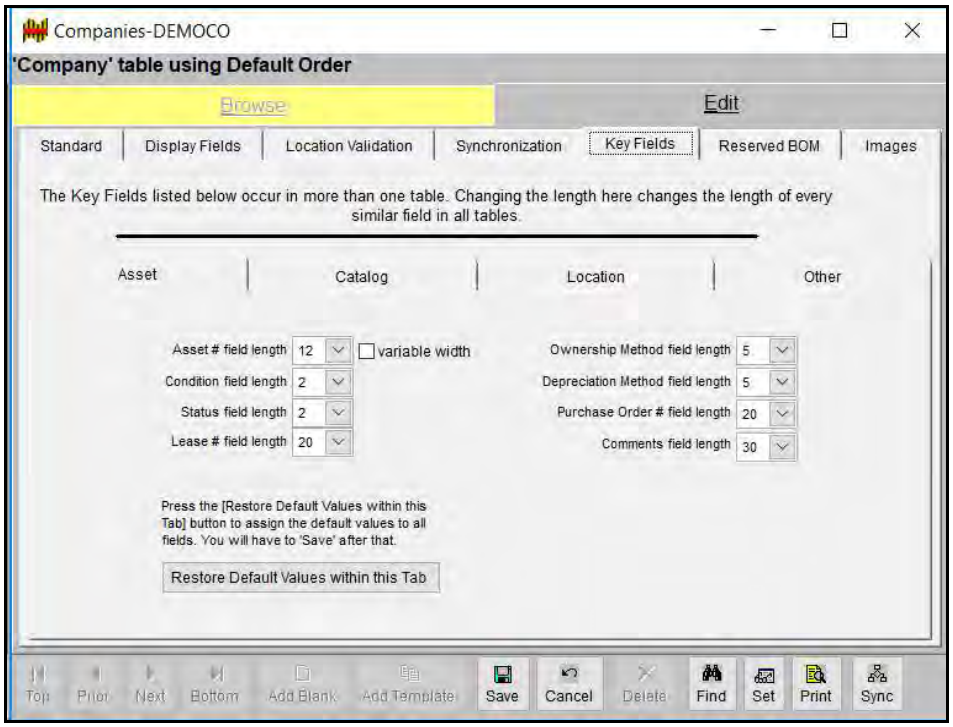
The introduction of Company Synchronization by Email added some new fields. One of these fields is the LogCoCode field. This field has been added to all tables. It reflects the company code under which the last operation was performed on a record. For example, if an asset is changed in the Democo its LogCoCode field will be assigned the value of 'DEMOCO'. When that update is sent by Company Synchronization to another company, it will keep that value until it is updated again in the new company.

Another field is 'LogUDT'. This is a 'datetime' field that contains the Universal DateTime equivalent of the combined LogDate and LogTime fields. The UDT or Universal DateTime is equivalent to GMT or Greenwich Mean Time.

Key Field Length

There are some Bar|Scan Fields that we call Key Fields. This is because they are located in more than one Table in Bar|Scan or have specific reasons for their length, e.g. the Room Tag is normally length checked when scanned to minimize the error of scanning the wrong bar code label. This Tab makes it easier to change the length of these field by also adjusting the length in all the correct Tables.

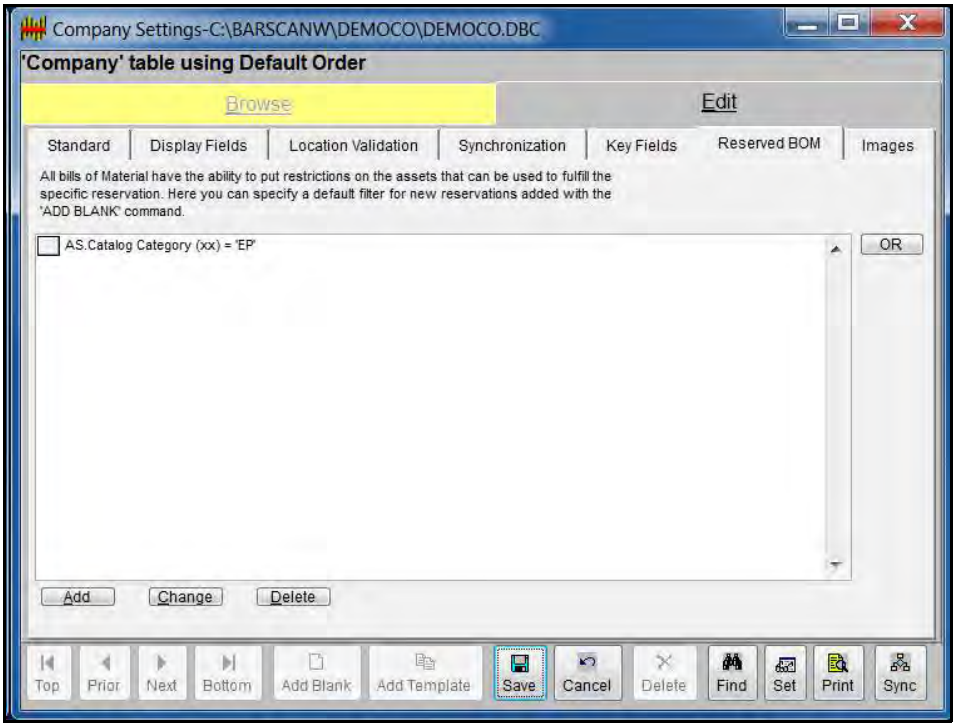
While it is also possible to change the length of the fields in the individual Tables, using this feature is much faster.



You can change the length of as many fields as you like, then press the Save key. A Restructure and Reindex is required after you have made your selection.

Reserved Bill of Material

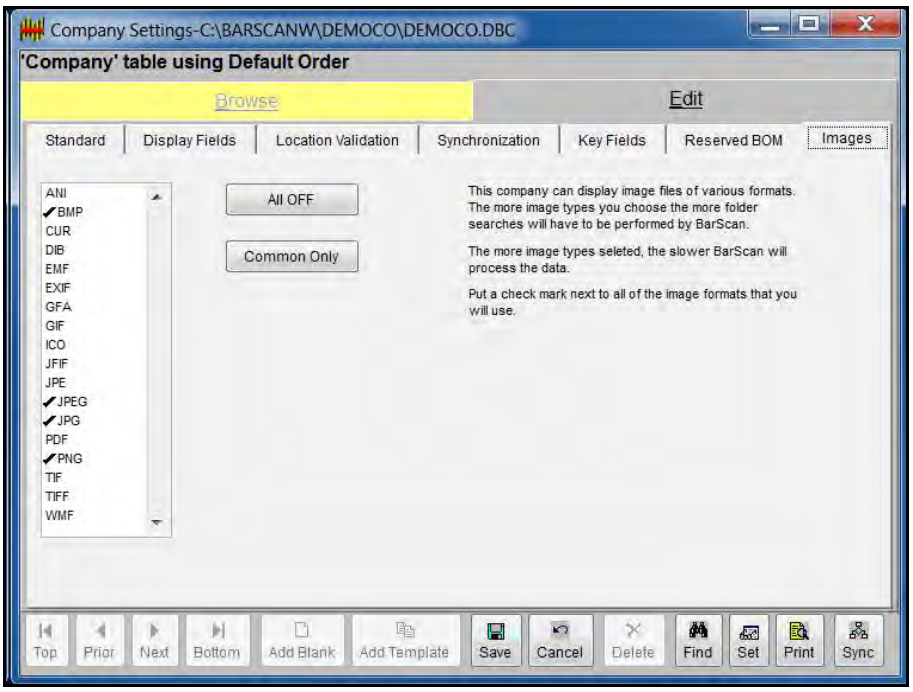
You can restrict your Reserved Bill of Materials by using one or more filters. In the example below, the filter Catalog Category equal to ‘EP’ restricts the Assets that can be used to fulfill reservations to those categorized as ‘EP’, the code commonly used for Computers.



You can also create restrictions by location, organization, or even other asset qualities.

Images

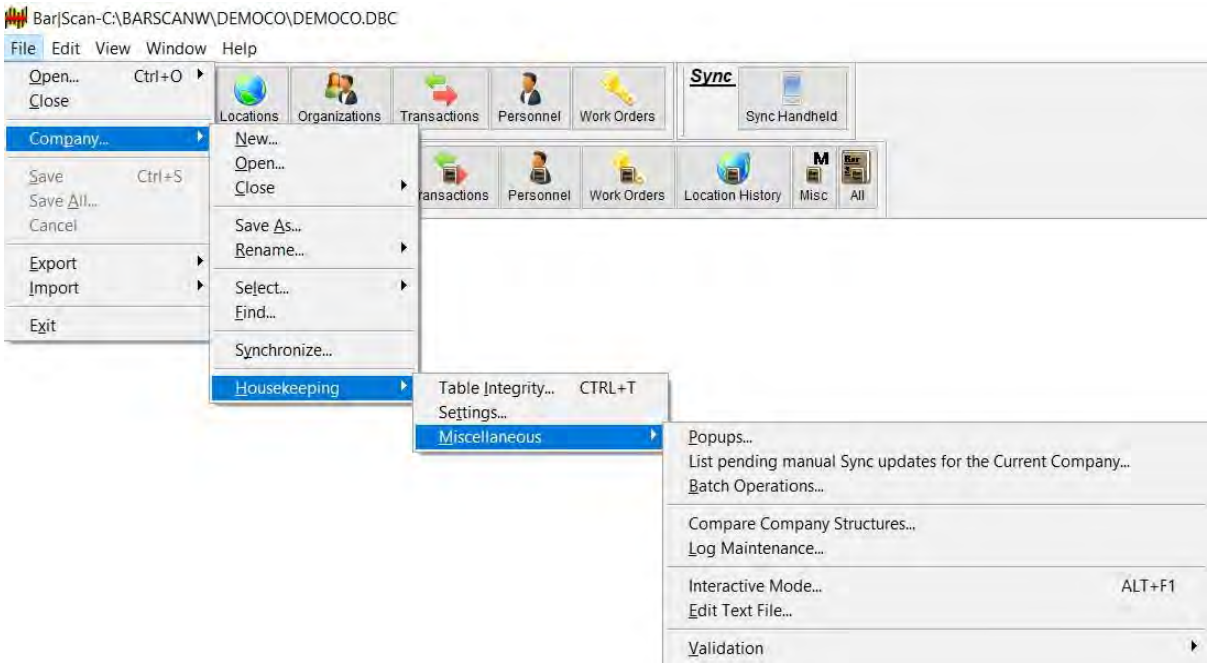
You can restrict your recognized image types by checking one or more image formats. In the example below, the 'Common Only' button has been pressed selecting only those formats that you see as checked as being recognized by the Bar|Scan Imaging Module.



The more image types that you check on, the longer it takes to process image related functions such as displaying or printing images as Bar|Scan will need to search for more image files.

THE MISCELLANEOUS DROP DOWN MENU

When you select Miscellaneous, you will see another menu list like the one below.



You will not need to use most of these items every day, and you may never need a couple of them.

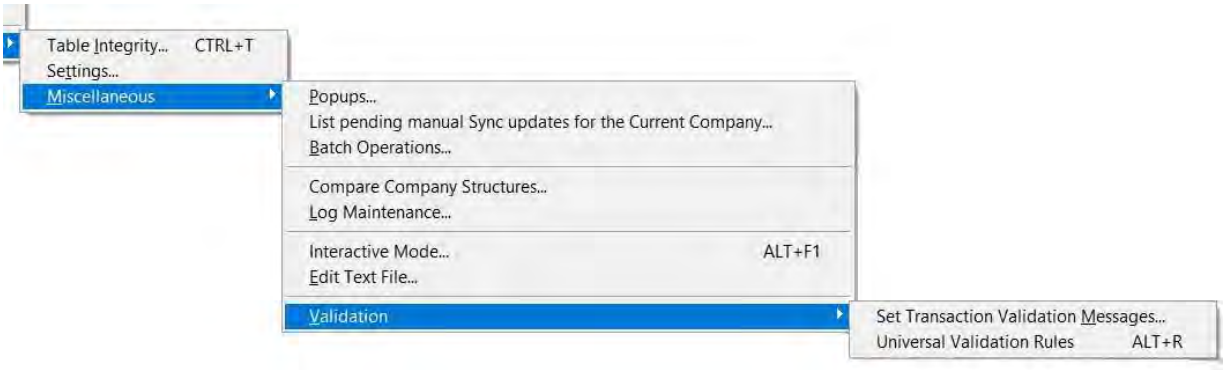
VALIDATION

Validation is the action of checking the accuracy of your asset information based on rules. For example, one rule is that two different assets cannot have the same serials number. This feature allows the user to create a list of custom validation rules for the Main Tables in the Bar|Scan Desktop Application. These Rules apply to specific fields. By default, all Bar|Scan tables have validation rules that fields must met. There are two mechanisms to control these rules.

#1.) For the Transaction Table Only, select the 'Set Transaction Validation Messages' panel. In this panel, you can enable, set to warning or disable a specific validation. These are the most common validations for the Transaction Table and are robust enough for most users.

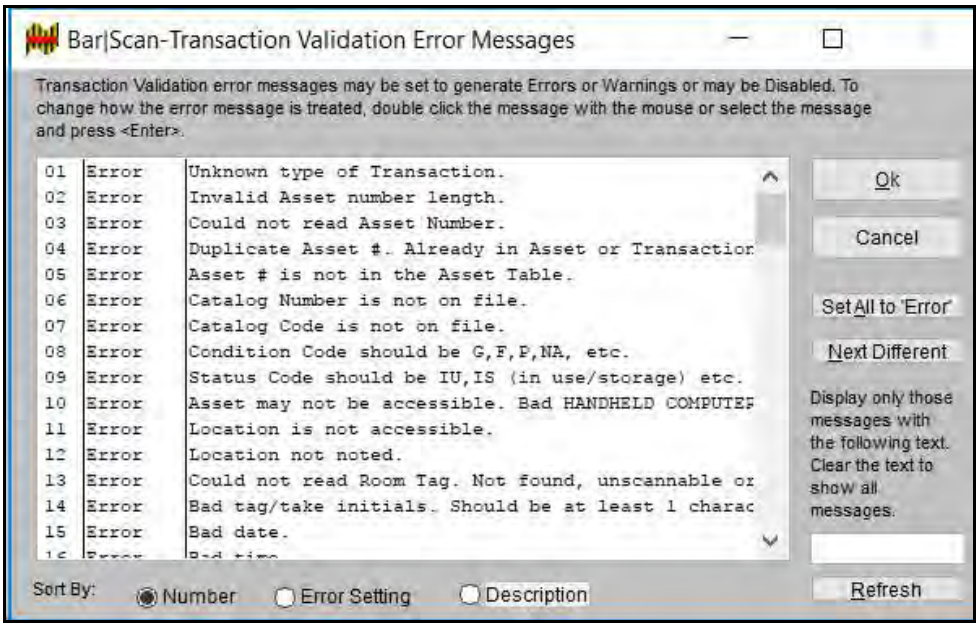
#2.) There is a more advanced 'Universal Validation', whereby Bar|Scan administrators can establish a single set of custom validation rules per company database for most tables, including the Asset and Transaction tables. It verifies data when it is saved. Values can also be assigned just they can be assigned in the handheld devices with Advanced Handheld Validation.

When you select Validation, you are presented with the two menu options as shown below.



Set Transaction Validation Messages

The Set Transaction Validation Messages Display Screen allows you to select how errors are treated when Bar|Scan checks the Transaction table for validation.



This feature will allow you to see the list of items that Bar|Scan will check for when you choose the Validate the Transaction feature.

When you use choose to validate the Transactions, Bar|Scan will have the ability to check the Transactions in your Transaction table according to the items listed here, and will check for all of those that are set to Enabled.

This table will allow you to view the types of items that Bar|Scan checks the Transaction table for, and all of those that make an error message. It also will allow you to reset the severity of the validation messages, so that they create only a warning message and not an error, or so that they are disabled which creates neither an error nor a warning message.

Change the severity of the error message by highlighting the message, and double clicking it.

Selecting the Ok button will save any changes that you have made to the severity of the messages, and then take you back to the Housekeeping Menu.

The Enable All mode will set all of the messages to Enable, therefore Bar|Scan will check all of the Transactions for all of the items listed here during the validation process. Each time that Bar|Scan finds a Transaction that does not follow the central idea of the message, it will consider that Transaction invalid. When the Transactions are printed out, any of the Transactions that are found to be invalid, Bar|Scan can print an error message for. Transactions that are found to be invalid cannot be moved to the Asset file. Invalid Transactions have to be changed to make them valid, the validation process needs to be done again, and then the Transactions will have to be printed again before Bar|Scan will allow you to move them to the Asset file.

The Next Different mode will instruct Bar|Scan to search through the list to find the next message that is set to a different severity. Bar|Scan will start at the first message and scroll the messages. When Bar|Scan finds a message that has a different severity setting, the pointer (which appears on the left-hand side of the messages) will stop and point to the first severity that is different. If Bar|Scan does not find any messages that are set to a different severity, you will see a pop-up message that will say "All messages are set to Enable," or "All messages are set to Warning," or "All messages are set to Disabled."

The Cancel mode will simply cancel any changes that you have made to the severity of the messages, and will take you back to the Housekeeping menu.

Selecting a Message

You can choose a message by clicking on it with your mouse, using the arrow keys to scroll down the list until the highlight bar is over this selection, or by simply typing the hot key, in this case the letter "v."

On this table, you may choose a message simply by using the arrow keys to scroll up and down the list, or click on one of the messages with your mouse.

You may change the severity of the message by either double clicking it with your mouse, by moving the highlight bar over the message that you want to change and pressing the space bar or the <Enter> key.

Note: There is an exception to the check for Duplicate Serial Number. If the Serial Number field is left blank, or if the field is filled with NA for Not Applicable or FU for Follow Up, Bar|Scan will not consider these duplicates. Therefore, you can use NA or FU in the Serial Number field for many Assets, and Bar|Scan will not consider this an error.

The default for the Severity for each message is set to Enabled. Therefore, Bar|Scan would check for all of the messages, and consider each Transaction not following these guides invalid, and therefore not movable to the Asset file.

There are times you may want to change the severity of the message, or to disable it completely.

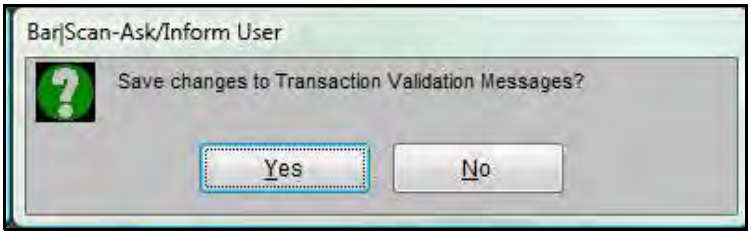
For example: You may not have the Work Order module, or you may have the Work Order module and may not be using it for this particular company. If this was the case, you may have used the Work Order Number field to store a number that was not a legitimate Work Order Number. If so, you would not want Bar|Scan to check the Work Order table for that number, which is what it does when the Work Order Message is enabled.

Or, when you are doing equipment, there are some types of larger pieces that are actually separated into two or three pieces that have the same serial number. Bar|Scan does by default check the Serial # Message to see if any of the Assets have the same serial number. If some of the items that you are inventorying legitimately have the same serial number, you may want to set the Serial # Message to warning only.

When you set the message to warning only, Bar|Scan would place a warning message on your printed report under each transaction that has the same serial #, but would not consider these items invalid. Thus, when you look at the report, each transaction that has the same serial number would be marked for you making them easier to check for validity. When you have checked the serial number duplicates, and you know that they are correct, you could use the move feature to move these items without printing them out again.

This feature can be very helpful when you validate and print your Transaction file, and Bar|Scan does not consider the information in the file valid, and you know that it is. Be careful when using this feature, as Bar|Scan was designed to check for errors, it is usually best to let it check for as many as possible.

When done making any changes that you wish to make, simply select the Ok button, and you will see a dialog box like the one below.



When you select Yes, Bar|Scan saves your changes. If you select the No button, you will be returned to the Housekeeping drop down menu.

Universal Validation Rules

This feature allows the user to create a list of custom validation rules for the Main Tables in the Bar|Scan Desktop Application. These Rules apply to specific fields. By default, all Bar|Scan tables have validation rules that fields must met such as the Asset Table cannot have two Assets with the same Asset Number.

In this section, we discuss a more advanced 'Universal Validation', whereby Bar|Scan administrators can establish a single set of custom validation rules per company database for most tables, including the Asset and Transaction Tables. It verifies data when it is saved. Values can also be assigned just they can be assigned in the handheld devices with Advanced Handheld Validation.

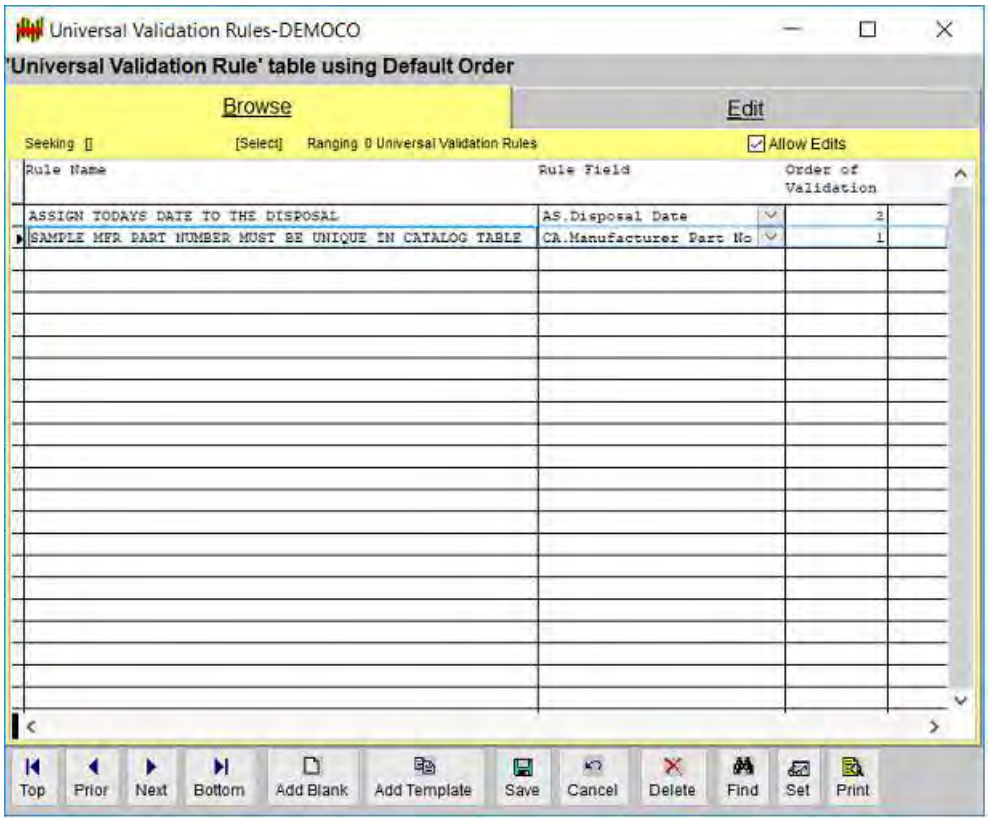
There is an accompanying Messages Tables for Universal Validation. This table can be accessed, for example, to add the error messages to reports or exports for any Assets or Transaction.

There are a few types of fields that are excluded from this feature. They are:

- ✓ All log fields
- ✓ All Recid fields (these are the primary keys in the database and do not contain any user data)
- ✓ All Key fields (these are special fields in company configurations)
- ✓ Work Order Line Number field
- ✓ All Yes/No (logical) fields

There is no handheld component to this Universal Validation feature. However, there is a separate Advanced Handheld Validation feature for handhelds. It is documented Chapter 11 of this User Manual.

Beginning at the Bar|Scan Main Menu and with the selected Company Database open, select File-> Company-> Housekeeping-> Miscellaneous-> Validation-> Universal Validation Rules. A panel similar to the following will appear.



As you can see, there are two examples shown for the DEMOCO.

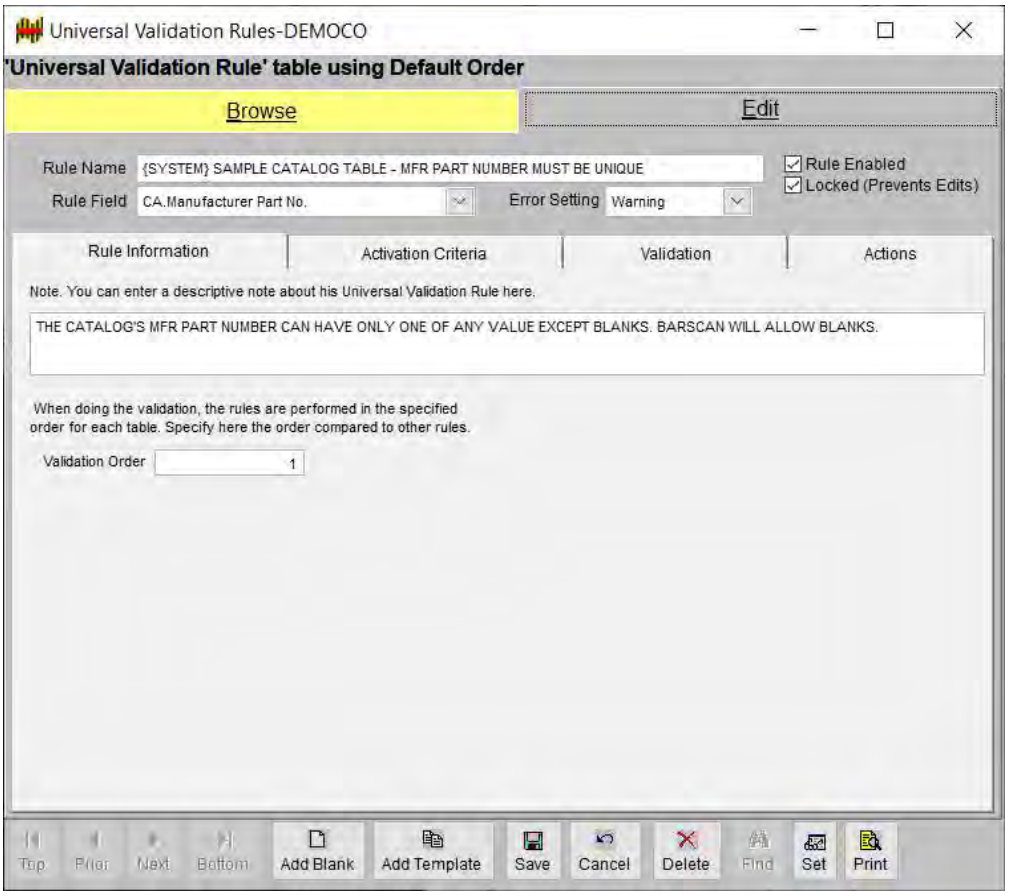
The first Sample Universal Validation Rule performs the following task: If the Current Room is 'STORAGE' and the Status Code is 'IS', this rule inserts the current date into the Asset's Disposal Date field.

The second Sample Universal Validation Rule performs the following task: In the Catalog Table, the field Manufacturer Part # must be unique. In other words, it

cannot be duplicated. However, the rule does allow the field Manufacturer Part # to be blank.

Note the three fields added to the Browse Panel. This assists you in determining the field that the rule applies to and the order in which that validations will apply to the table.

Click on the Edit Tab, you will be presented with the following panel:



Rule Name

Enter a descriptive name for this rule. It can be any name of your choosing. The rule name can be up to 100 characters long so it is best to be as descriptive as necessary.

Rule Field

Select the Table and Field that you wish to have your rule apply to. In the example above, we have selected the Catalog (CA Table Alias) Manufacturer Part Number.

Rule Enabled

You can Enable or Disable your validation at any time by checking or unchecking this item.

Locked (Prevents Edits)

If the rule is unlocked, anyone with privileges to modify a rule can do so. Locking the rule prevents accidental edits.

Error Setting

You can select either 'Error' or 'Warning' as the Error Type. An 'Error' will not allow you to save your work. A 'Warning' will display a message based on your rule but you will be allowed to save your work.

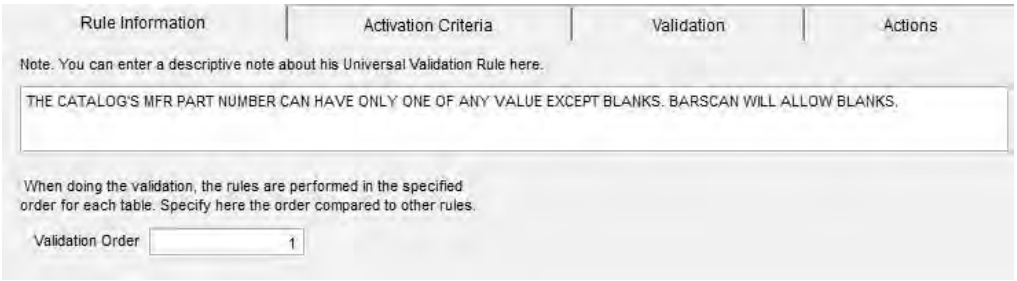
The Rule Information Tab

As shown below, you may enter a descriptive note describing the rule that was created. We recommend doing this as rules can become quite complex and this can be very helpful.

Validation Order

You can enter in a number so that your validation rules are applied in the correct order. Most validations do not require a specific order but at times this can be important, especially if you have more than one rule for a particular rule field. Each Table can have the same numbers entered. For example, you can have order 1, 2 and 3 for the Asset Table and also order 1, 2 and 3 for the Catalog Table. If you leave this field blank, the next available number will be entered for you.

When you require two or more rules to be performed in a specific order, enter the order number here. For any particular table, you can enter an order. For example, you may have validation rules labeled "1" and "2" for the Asset table and also have rules labeled "1" and "2" for the Catalog table.



The Activation Criteria Tab

As shown below, you may need to enter one or more criteria. Criteria is not always needed when creating a new validation. If there is nothing entered into this tab then the rule is always applied. In other words, it is always active.

Note that the Activation Criteria is a logical AND for all three categories. In short the Activation Criteria = Operation Criteria AND User Criteria AND Value Criteria. If any one of these is false, then the final result is also false.

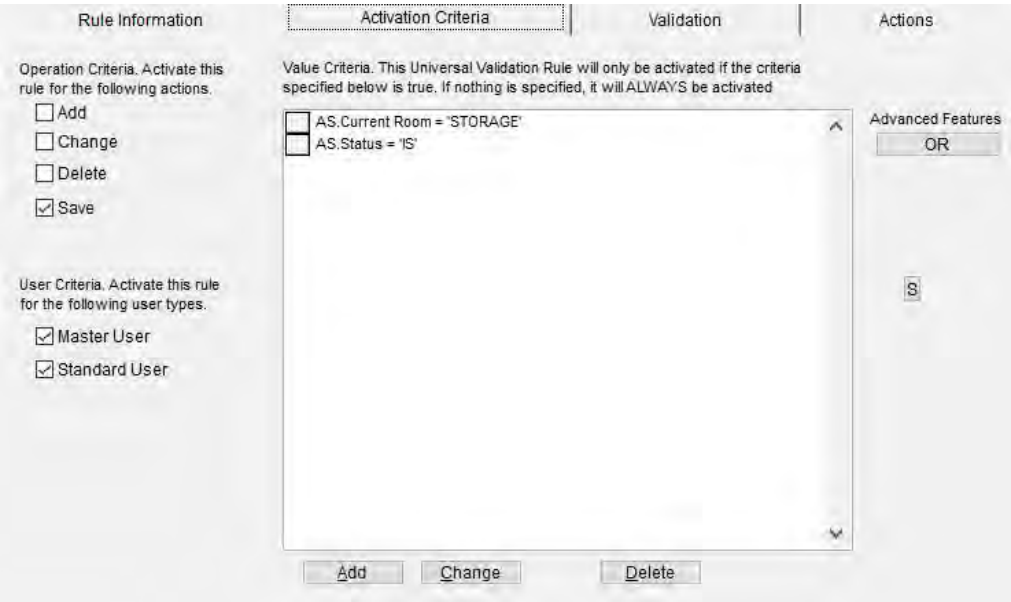
So the Activation Criteria can only be true if:

Operation Criteria. At least one of ADD/CHANGE/DELETE or SAVE is checked.

User Criteria. At least one of Master User or Standard User is checked.

Value Criteria. If nothing is entered (making it true) or if the specified criteria filter is true.

In the following example, this validation is not always active but it is contingent on the asset's current room being 'STORAGE' and the asset's Status being 'IS' (In Storage). These are the criteria to begin the Universal Validation process.



As you can see from the panel above, creating an Activation Criteria is similar to creating a filter on report. For more detail on this process, visit Chapter 10 – Reports.

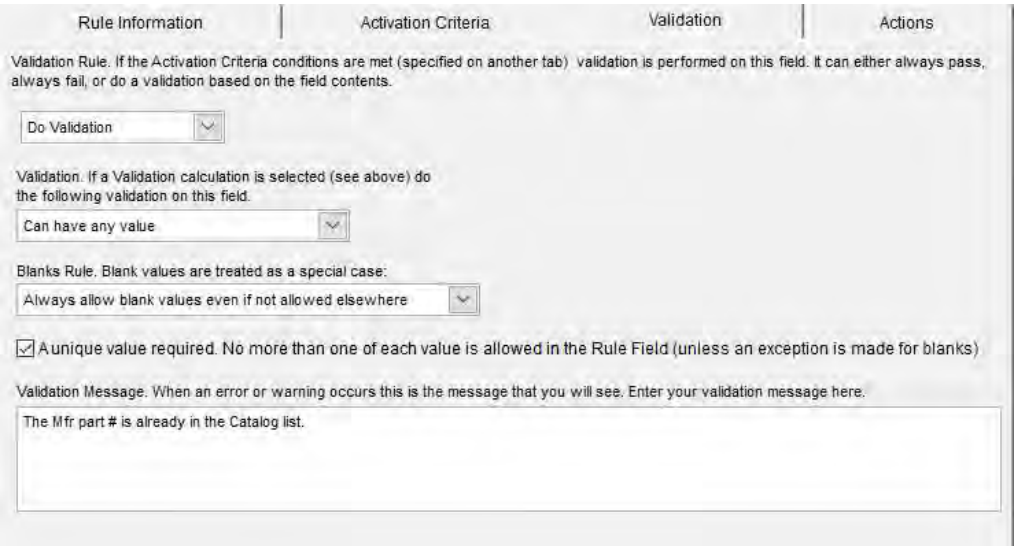
On the left side of the panel is the Operation Criteria. You can choose none, one or more. For example, if you choose 'Add' then the rule applies only when adding a new item (using Add or Add Template).

If you choose 'Save', then the rule also applies when performing a Bar|Scan upgrade to a new version or when performing a Table Integrity.

You can also select whether the rule is activated for a Master User (Bar|Scan Administrator), a Standard User (not an Administrator) or both.

The Validation Tab

As shown below, you will need to enter four items in the validation Tab as discussed in the following section.

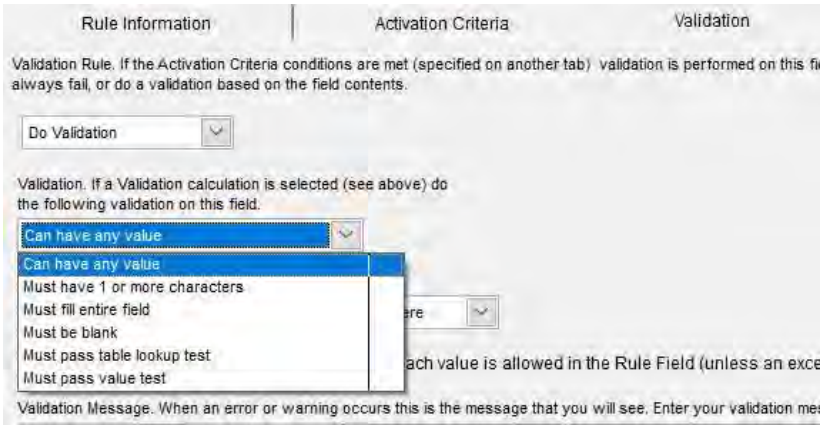


The criteria conditions are shown below. These are similar to the selections used in Advanced Validation for the handheld. The value in the Rule Field must satisfy the criteria specified in the contents of this tab page. Starting at the top you will select the Validation Rule.

Do Validation – this takes the activation criteria from the previous tab and then uses the additional instructions on this tab to add more detail to the rule.

Always Pass – this takes the activation criteria from the previous tab and always passes validation if true. No other criteria is necessary.

Always Fail – this takes the activation criteria from the previous tab and always fails validation if true. No other criteria is necessary.



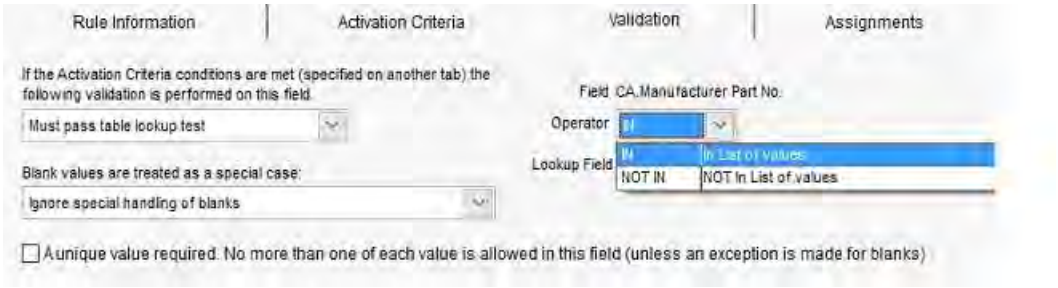
Can have any value – the value in the Rule Field can have any information entered, including blank.

Must have 1 or more characters – the value in the Rule Field must have information entered. A blank is not acceptable.

Must fill entire field – the value in the Rule Field must have information entered that matches its field length. For example, a Catalog Category field must have two characters.

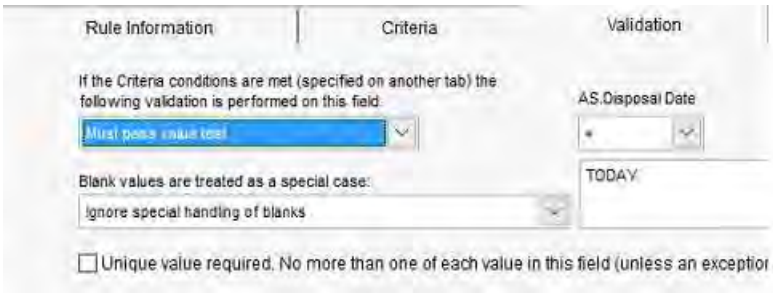
Must be blank – the value in the Rule Field must be blank. For non-character fields it must be an empty field, e.g. an empty date, a zero-value number, False/No for a logical Boolean, etc.

Must pass table lookup test – the value in the Rule Field must match/not match at least one value in a field in the same table or another table. For example, a UDF (User Defined Field) titled Department must have the same information entered as the Organization Table's Department field. This type of validation is different (not related) to the Pop-up fields Table (accessed in the Housekeeping-> Miscellaneous section of Bar|Scan). When you select 'Must pass table lookup test' the panel changes and you can enter a comparison operator (IN/NOT IN) and the field that will be checked as shown in the section below.



There are only two choices for the Operator, “IN” the Lookup Field or “NOT” in the Lookup Field. After you select one of these, you must then select the Lookup Field that contains the list of value that the value in the Rules Field will be compared to.

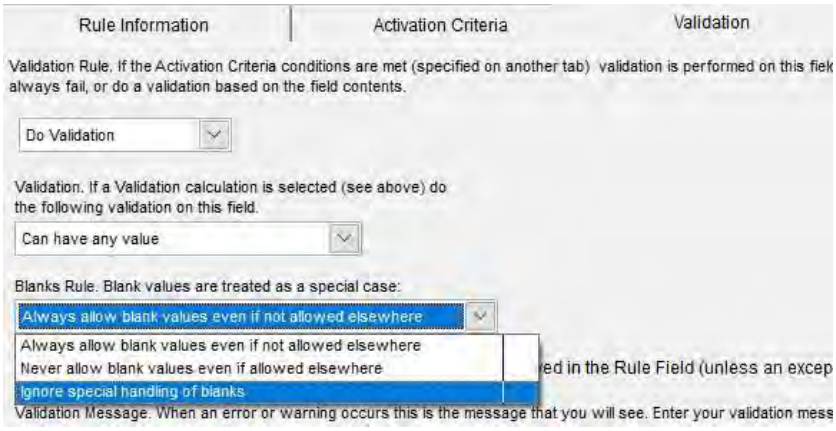
Must pass value test – the value in the Rule Field must satisfy the comparison criteria that you enter. When you select this option a set of fields appears where you can enter the operator and the Lookup Value(s). The Operators are the same as those used and documented in other areas of Bar|Scan including Sets and Reporting.



These operators will change depending on the type pf Rule Field. For example, ‘Contains’ and ‘Does Not Contain’ will not be seen for date fields but you will see these for Character fields.

Blanks-Special Handling

The panel below displays the choices available when treating blanks as a special case.



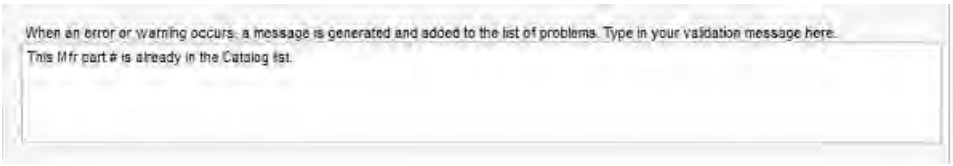
This is independent of the Criteria condition above it and there are three choices as described below.

Always allow blank values even if not allowed elsewhere – This selection means that the value in the Rule Field can have a blank value, no matter what else any of the other validation tests imply. This case allows ignoring any blanks previously entered. For example, suppose that you want to start entering the Manufacturer Part # in the Catalog table, but all of the existing catalogs have a blank value in the field. If this case is selected all of the Manufacturer Part #'s may start all blank, but gradually be entered. Fewer and fewer blanks will exist. However, if during this process a user enters a duplicate non-blank, it will not be allowed.

Never allow blank values even if allowed elsewhere – Once all records have a value entered into the Rule Field, this rule can be used to force users to always enter a value. For example, if a Personnel UDF, such as 'Position' is created then the user must always fill it in.

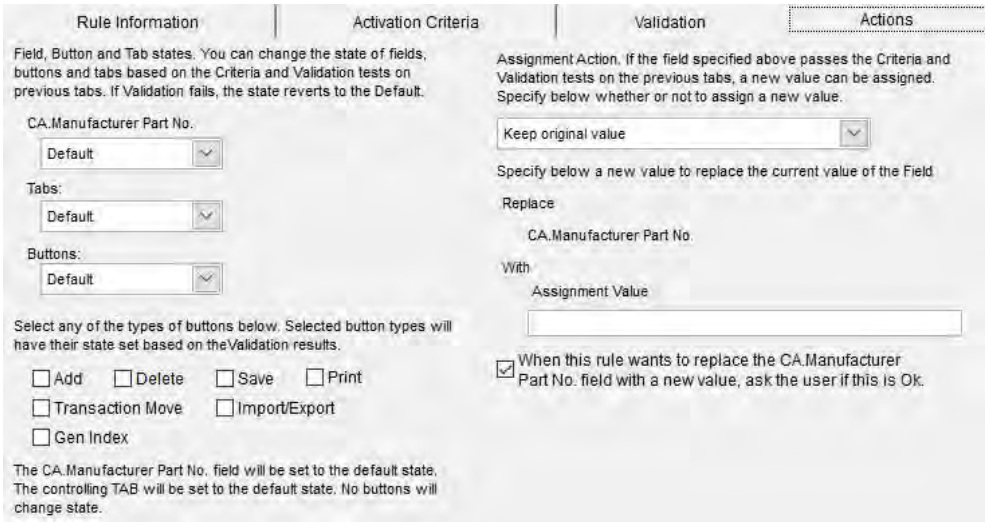
Ignore special handing of blanks – this is the default option. It means that there is no special handling of blanks. Blanks are treated just like any another values. For example, if the user has specified that all values are unique then only one blank value will be allowed. Many Bar|Scan tables do something similar, where blanks are allowed, but only one, e.g. the Status Table.

Finally, at the bottom of the tab, enter the validation message that you would like Bar|Scan to display when the edit does not pass the Universal Validation rule. Similar to the built-in validation rules, any violation of the validation displays a dialog box prior to a save. This message may also be printed on reports or part of your export.

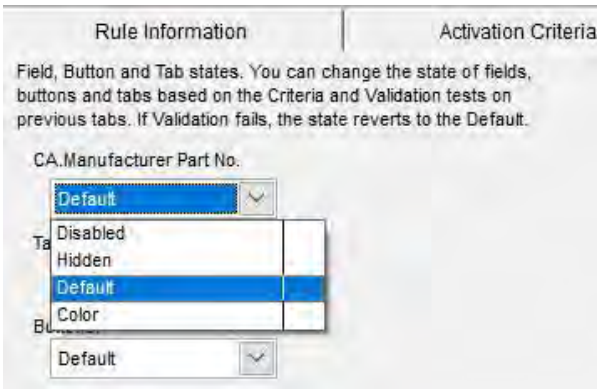


The Actions Tab

On this tab, there are multiple items to consider. On the left side you have the Field, Button and Tab states and on the right side, you have the Assignment Action.



Field, Button and Tab states - for the selected field, there are several choices including disabling, hiding the field, or changing the color of the field.



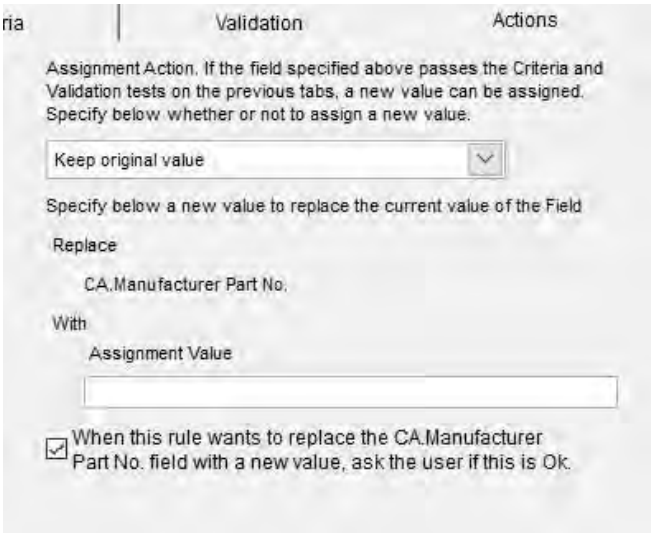
For each field selected, the functions just discussed will affect standard fields as well as User Defined Fields (UDFs) and those states will apply on both the Browse Screen as well as the Edit and UDF Screens. For example, marking the field as hidden will remove the field from any and all of the screens.

Color is useful in that the color will apply to the field only when the field passes the validation criteria.

Subtabs and Buttons can be either enabled or disabled. To disable any subtab, you select a field in that tab as the Rule Field and then on the subtab item select 'Disable'. For example, to disable the subtab 'Lease' on the Asset Panel, select any field on the subtab, e.g. Lease Number, Duration, Ending, etc.

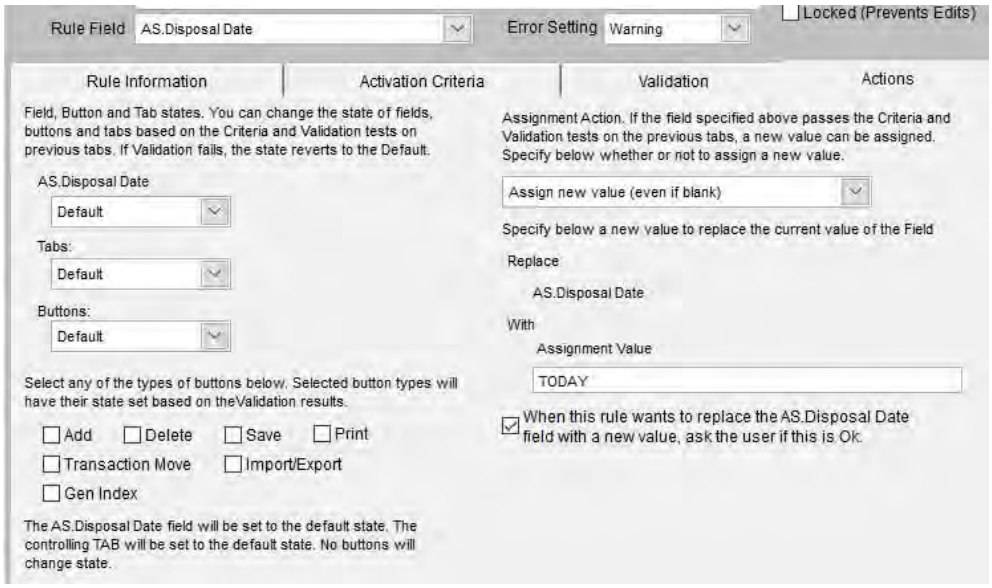
'Buttons' are present on a few panels. For example, on the Asset Panel, Edit Tab, there are three buttons on the Asset Location History section. These are 'Add Blank', 'Add Template' and 'Delete'. As an example , these can be hidden for non-Master Users. You will need to select 'Disable' (or 'Hidden') and then check mark 'Add' and 'Delete'.

On the right side of this tab, there are two choices, keep the original value or assign a new value to it (change the field). An example of each is shown below.



As you can see in the example above, no change is made to the Catalog's Manufacture Part Number field. This is because we are only checking to see that the field is unique, not making any changes.

In the example below, we are replacing the Disposal Date with the computer's date when you save the item.



The TODAY and NOW functions are described in more detail in *Chapter 11 – Bar|Scan Mobile.*

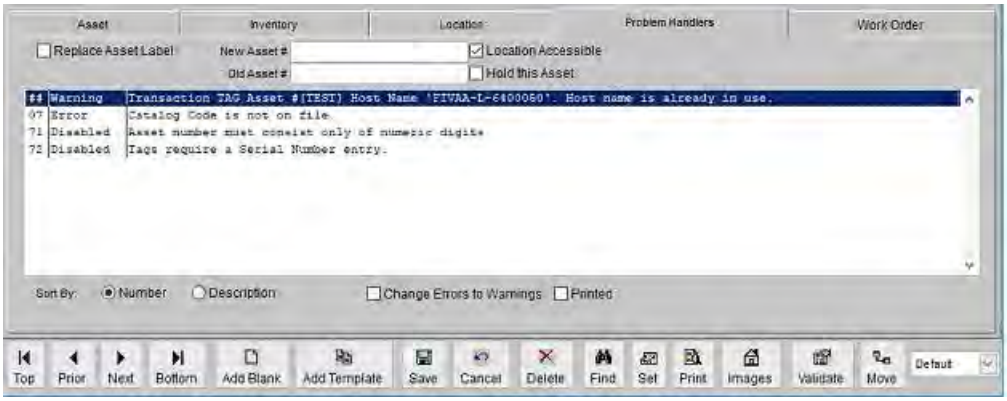
When this rule wants to replace the <Rule Field> with a new value, ask the user of this is OK – Normally you will not want to check this item. When this is checked it means that in normal use, a dialog box will be presented to the user before a change is saved. For example, when saving a change to an asset on the Asset Screen.

The Dialog will indicate, for example, the value that will be assigned by the Universal Dialog rule. Normally you will want to select 'Yes' so that the validation rule takes effect. If 'No' is selected, then the change will not pass the internal test (which is the same as the Validation failing).

Care should be exercised with checking this item this if there are any Bar|Scan Scripts (bini processes) that automatically try to change the data (such as an import) since validation will be run during the import and a dialog prompt may appear. For more information on Scripts, see the Bar|Scan User Manual Chapter 14 'Scripting Feature'.

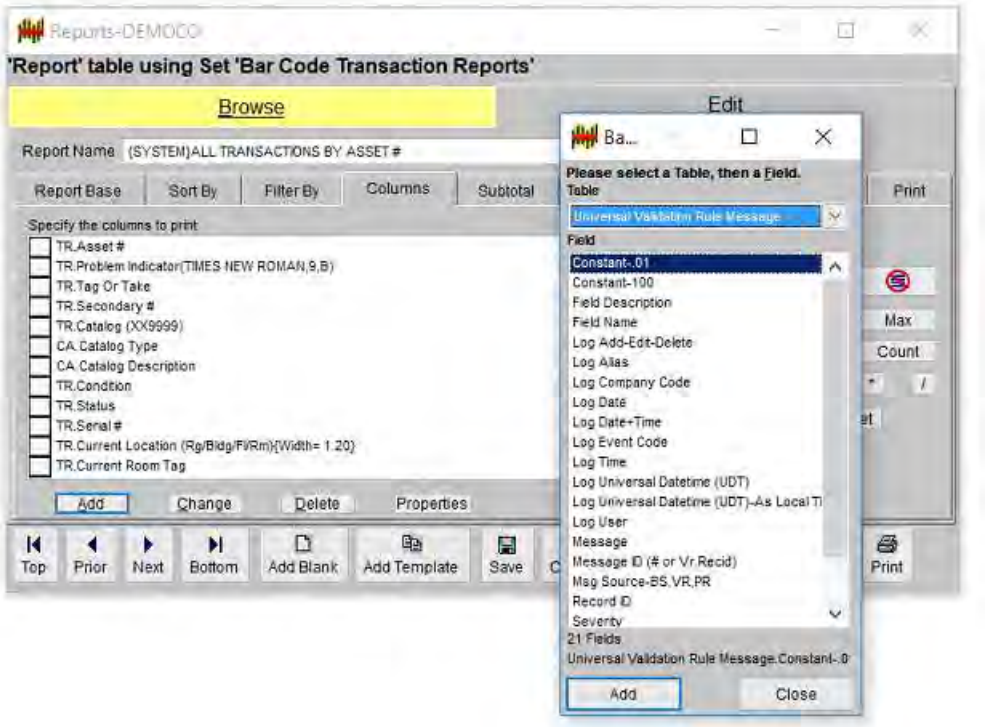
Universal Validation Messages in the Transaction Table

The regular 'Set Transaction Validation Messages' will be applied to the Transaction Table when the transactions are validated. Universal Validation Messages will now be displayed in addition to these. They are not numbered, rather they will be indicated with a '##' in the message number. Below is an example of how they are displayed on the Browse Tab.



Printing or Exporting Universal Validation Messages in Asset and Transaction Reports

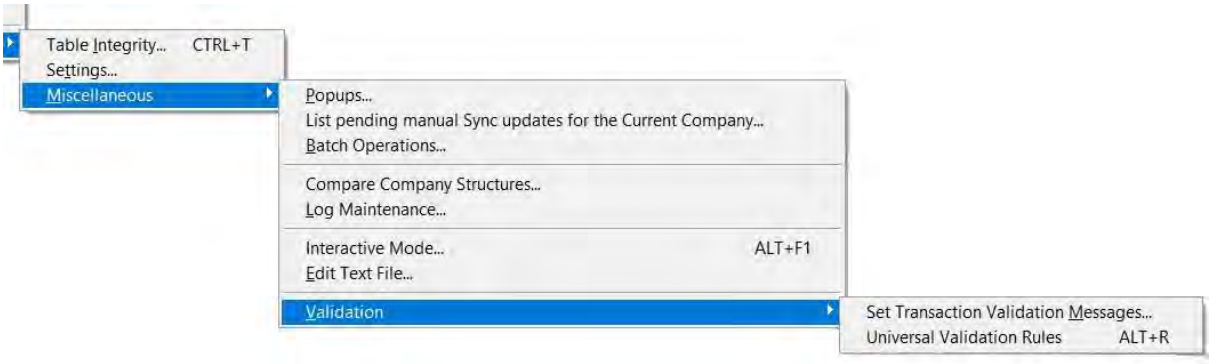
For printing or exporting of Universal Validation on your Asset or Transaction reports, you must select the fields from the Universal Validate Rule Message Table as shown below. The field that you should select is 'Message'. You may also select additional fields for informational use.



Run a Universal Validation on the Asset Table

For all tables, including the Asset Table, prior to printing Universal Validation Messages, you will need to run the table's 'Panel' menu option 'Panel/Range/Problem Items/From Top. You should perform this step each time you wish to print or export a report containing the latest validation information because the information can change often.

To perform this step, open the desired table, such as the Asset Table. From the 'Panel' menu select 'Range…', then submenu 'Problem Items' then submenu 'From the Top' as show in the image below.



This process can take some time on larger databases so leave sufficient time for processing If you begin this process and you are out of time, press ESCAPE to end the process.

POP-UPs

On any Table in Bar|Scan, pop-ups can have custom lookup values. Pop-up Values are company wide for all users accessing that company.

Access to this area of work is controlled by User security fields for the Pop-ups in the User Table, Page 2. For users that will be managing the list values, make sure that all checkmarks are set to allow full editing of the Pop-up lists.

To add pop-up values for any field, add a new Pop-up entry, set the desired field, then add values in the Pop-up Selections list, then Save.

Pop-ups are available to download into your Mobile Device. If you choose to do so, you must use filter in the Handheld Configuration. To recap, here is a detailed explanation for why filters are needed when configuring handheld fields to use pop-ups.

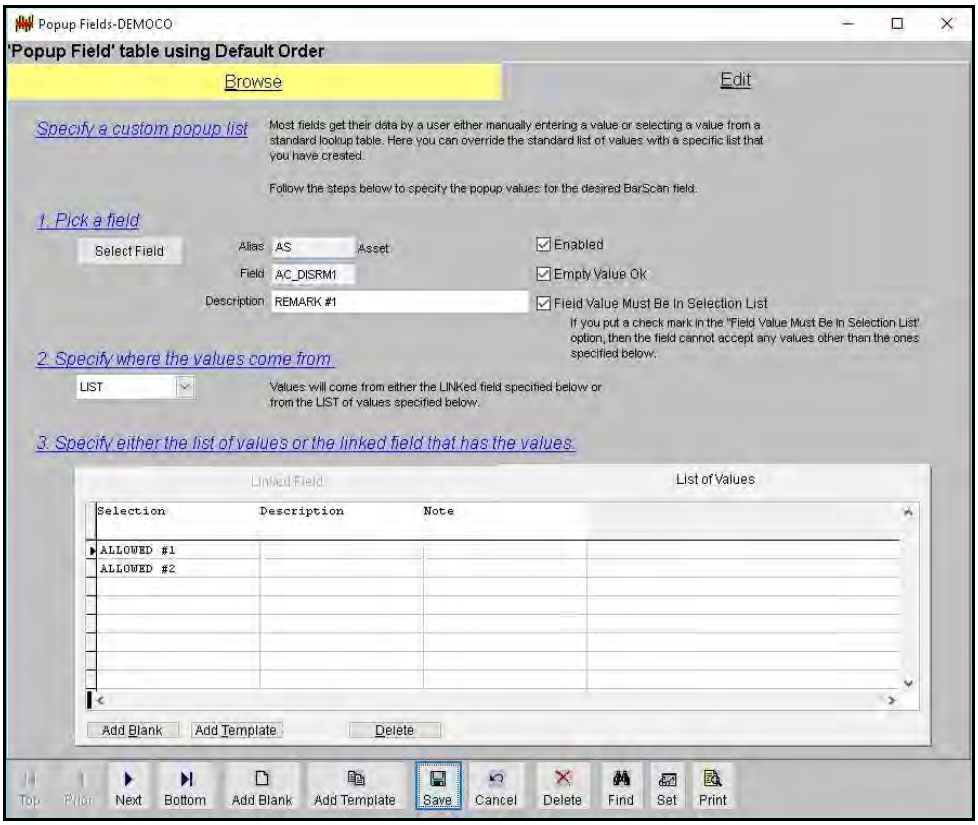
The list of all Pop-up values is kept in the Pop-Up (PUD) table. Since ALL values for ALL fields are contained in this table, we must set filters when trying to get a specific list of pop-up values for a certain field. Every pop-up list is uniquely specified by two values, its work area Alias (such as 'AS' for the Asset table) and it raw Field name (such as OW_NAME for the Asset Name). You may recall that even when making reports, first you must select the work area alias then the field within it.

Chapter 11 - Bar|Scan Mobile and our website Tips page provides more information on this subject.

Linked Field Tab

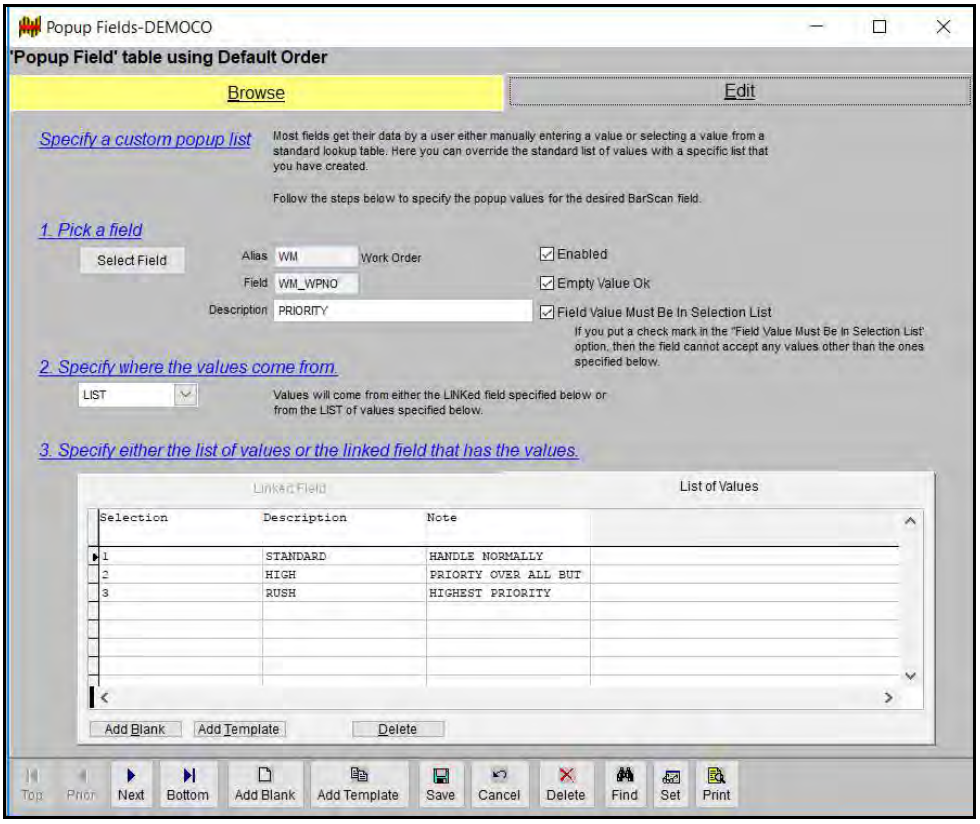
Linked fields are very useful when there are more than two separate fields that use the same list of popup values. Rather than duplicating all of the values again in the second or third field you can 'link' the other fields to the values listed in the first field.

For example, in the Asset table there are three (3) Remark fields called 'Remark #1', 'Remark #2' and 'Remark #3'. First enter the list of allowed remarks in the Popup screen for 'Remark #1'.



List of Values Tab

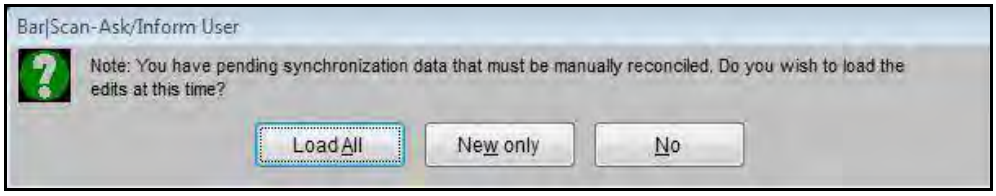
Below is a screen showing a custom Pop-up selection for the Priority Field in the Work Order Master table created in the List of Values tab.



List pending Manual Synch Updates for the Current Company

During the Sync process, Bar|Scan imports and update as much information from your sync partner as possible without manual involvement.

There may be times when the synch decision is too complex, so Bar|Scan asks you for manual involvement. This happens when Bar|Scan detects that there have been multiple updates to the same item, both by you and your Sync partner. For example, you might change the Catalog Number of an asset after your last Sync operation. Your Sync partner may do the same, but changes it to a different Catalog. Which one should be kept? Only you can decide. How does Bar|Scan present you with the data so that you can make that decision? Bar|Scan displays the following prompt when you open the Table for which there are pending updates:



Normally, you should select 'Load All'. This will load all of the pending edits that your Sync partner has performed. Then you must make decisions on which of your Sync partner's edits to keep and which to discard.

You must keep up to date on these edits since the more time that passes without a Sync, the harder it becomes to make the decisions needed. When you select 'Load All', the edits from your Sync partner will be set and all items with changes will become part of a range. Start at the top of the browse list and press ALT+R to move to the next range group. Examine the data item by item, field by field using the 'right click' pop-up menu item 'Field Information'. If you do not want

to keep your Sync partner's edit on a particular field then use the 'Restore Original Value' option to undo the change and move to the next field or item. See the Bar|Scan User Manual for more details.

After selecting 'Load All' and after you are done doing the reconciliation then Save the changes. If all of the data is reconciled then the changes will be saved and the pending Sync updates will automatically be removed. The prompt will not appear the next time you access that screen until there are more updates to reconcile.

The 'New Only' option loads only those edits from your Sync partner marked as being done after your own most recent edits. It ignores edits from your Sync partner that are older than your own edits. It does this by comparing the Log Universal Date/Time (LOGUDT) field in your record with the same field in your Sync partners record. If yours is older, then Bar|Scan will load the 'New' values from your Sync partner. This has value when you need to quickly get the most recent changes from your Sync partner and have confidence in your own changes are generally the most recent and don't have time to do the reconciliation. You still MUST do the 'Load All' option at a later time, but if you are keeping up to date with the Sync process the 'New Only' option can be valuable, as most times it only requires selecting the 'Save' button after loading the new items. Also, when selecting the 'New Only' option Bar|Scan does not automatically remove the Sync files, they will stay (displaying the above prompt) until you either do a 'Load All' and a successful save or manually remove them. See the Bar|Scan User Manual for information on how and when you might do this.

In summary, you should normally select the 'Load All' option to load and then accept or reject your Sync partners edits. Select the 'New Only' option if you are have confidence in your current data, since you still must eventually do a 'Load All'.

BATCH OPERATIONS

You can use the Batch Operations feature under Housekeeping to instruct Bar|Scan to process some Operations based on the Computer's clock or execute a series of commands sequentially like a script.

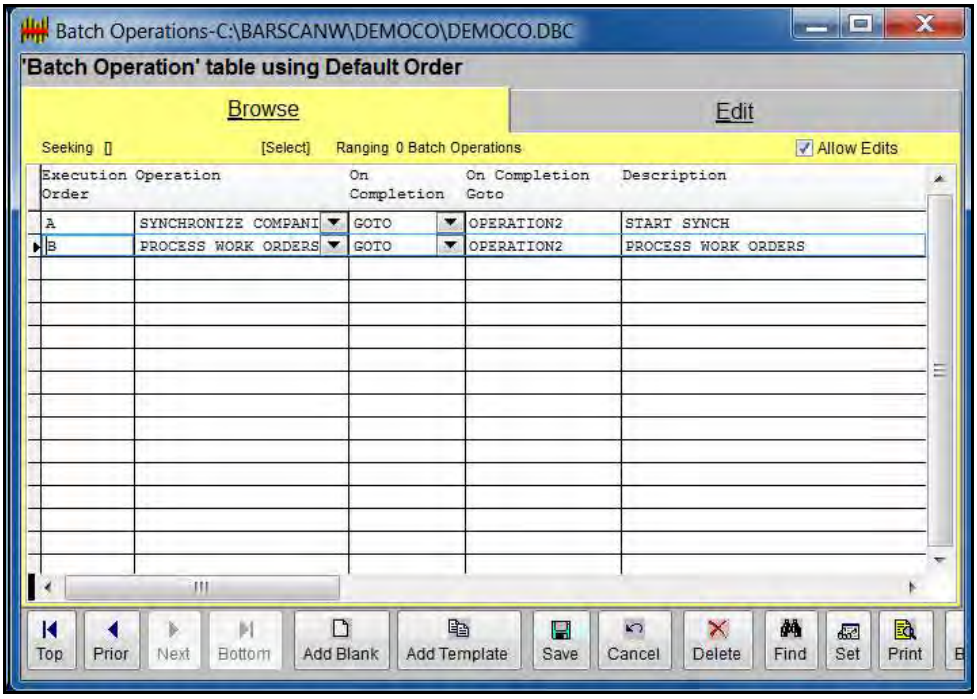
After you have created the Batch Operations, you will need to keep Bar|Scan running in Windows in order to have it execute any timed task. Timed tasks are those operations that you have set to start based on a future time.

We recommend that you create a separate User ID and Password and using this ID, start Bar|Scan and minimize the program. If you are on a network, it also may be best to run this session of Bar|Scan on your server rather than a workstation.

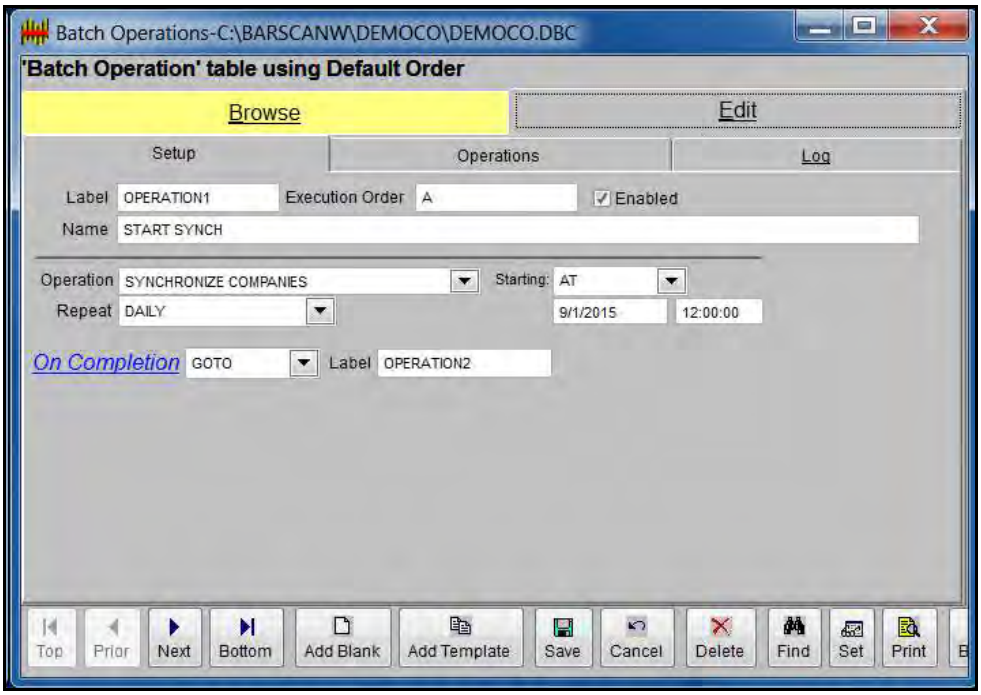
Timed tasks are executed according to the local Date and Time Properties settings

of the computer that is running Bar|Scan. So if the server is located in another time zone, you will need to keep this in mind.

When you start Batch Operations, you are presented with the following panel.



In the previous example, two Batch Operations have been added to Bar|Scan. When you want to see the detailed information that has been entered into the Batch Operations table, you will need to select the Edit tab. When you do, you will be shown a screen similar to the one below.

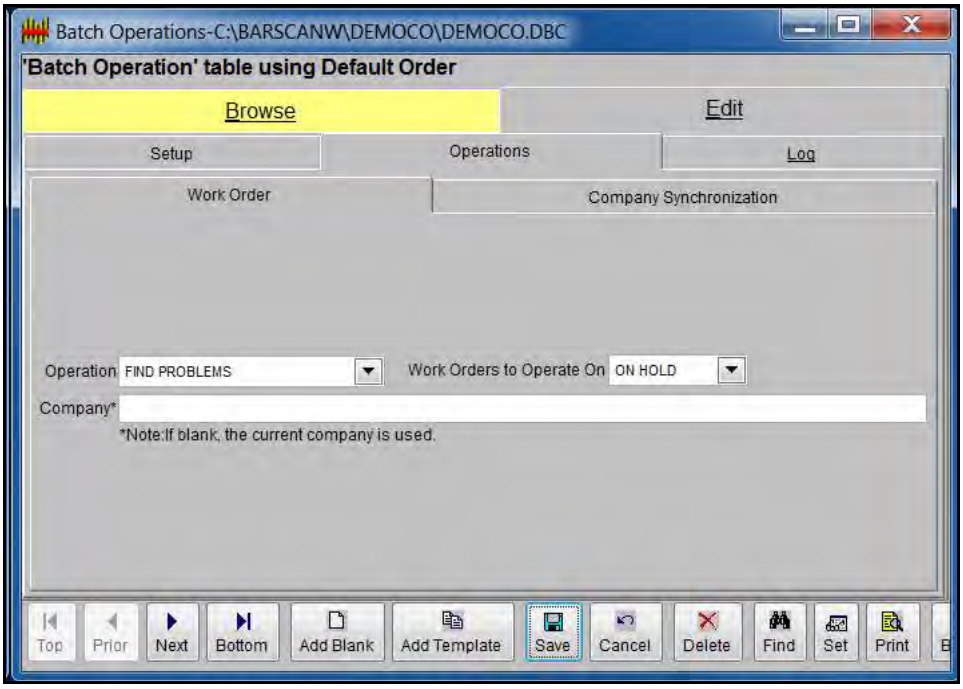


Note that the Edit Panel has three tabs on it, Setup, Operations and Log.

Each of these tabs contains information on the Batch Operation. The first tab, the Setup tab, is open as a default.

Operations Tab

There are two areas that can be initialized with Batch Operations, Work Orders and Company Synchronization as shown below on the Operation Tab.

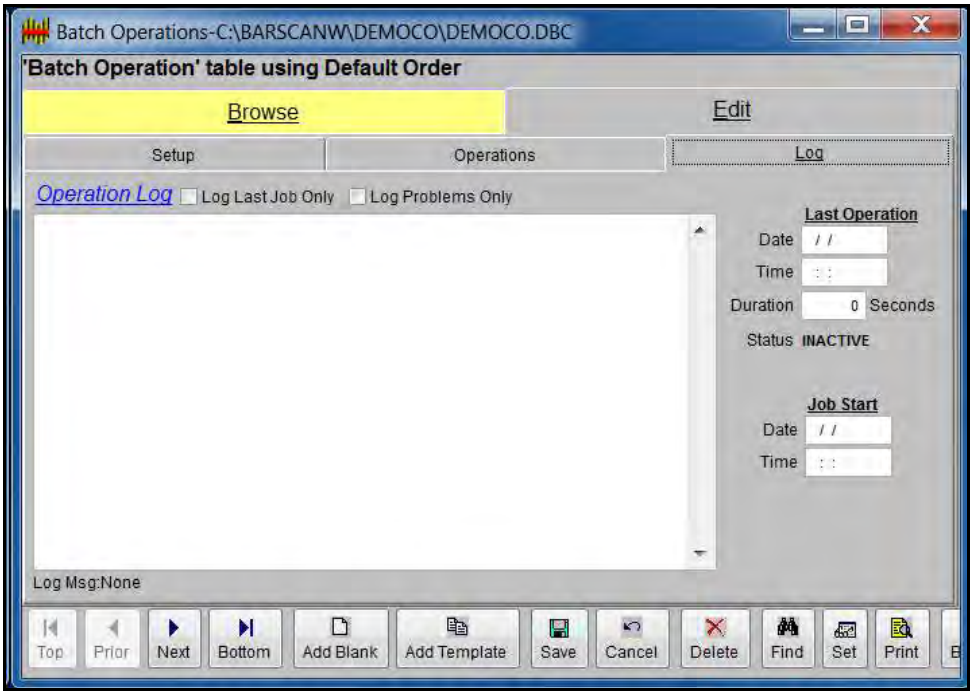


Since Batch Operations is an advanced function, it is best to contact your Bar|Scan Administrator before modifying or creating any new Batch Operations.

As an example, a Batch Work Order could be used to Find Problems if Work Orders are imported from another system.

Log Tab

It is important that Bar|Scan provides you with feedback on any Batch Operation to confirm that the operation was successful.



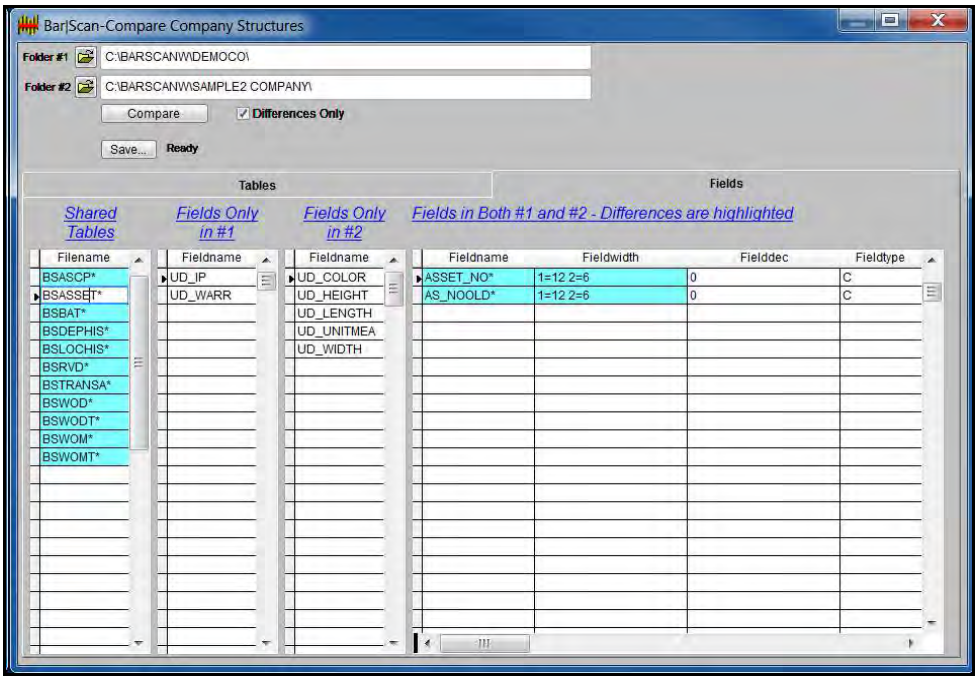
As you can see from the screen above, you can customize the Operation Log to present all Batch information or limit the information to either the last batch log and/or Problems.

We recommend that you record all Batch information until you are satisfied that the Batch instruction is working as desired.

COMPARE COMPANY STRUCTURES

You can use the Compare Company Structures feature under Housekeeping to compare the properties of any Bar|Scan company to another.

Only two Companies can be compared at one time. When you select Compare Company Structures, a panel similar to the following will appear.



There are two Tabs. The first is to compare Tables. Companies may have different tables. For example, if you are Logging Assets (Activity Logging) in the Democo but not in another Company, the Log Asset Table would not exist in Company #2.

The second Tab is the Fields Tab. Use this tab to compare fields within each of the Tables.

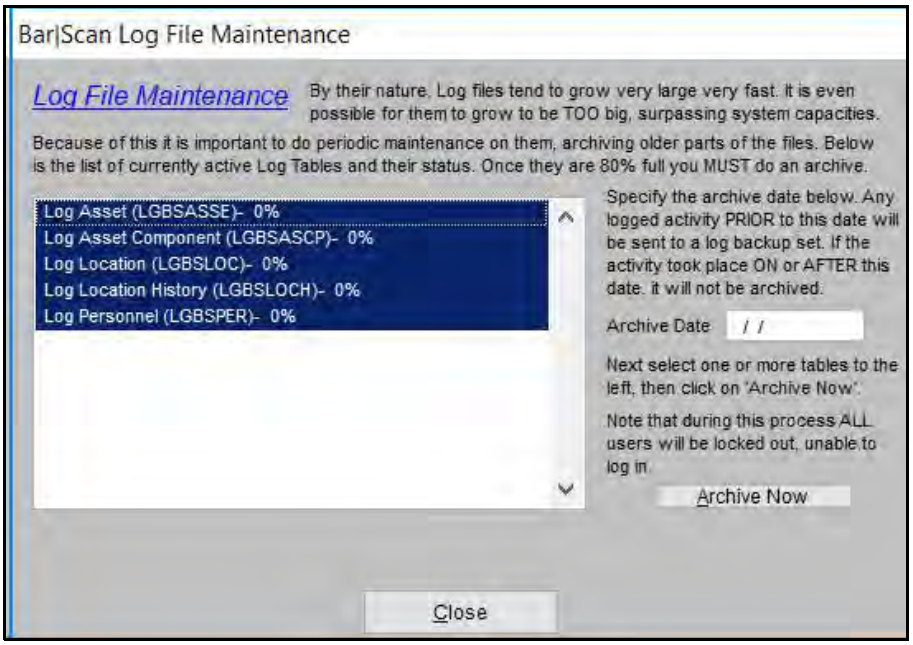
In the above example, we have compared The Democo (Company #1) to a Sample Company (Company #2).

Note that there are differences in the UDFs (User Defined Fields). Why is this important? If Assets were to be exported from the first company to the second company, important UDF information would be lost unless we make the two Company databases identical. There are several other comparisons we may be interested in such as differences in the lengths of standard Bar|Scan fields.

LOG FILE MAINTENANCE

Since Activity Logging can record and keep a very comprehensive audit trail, the Log Tables can become very large over time. At some point, usually after several years, they will require Archiving.

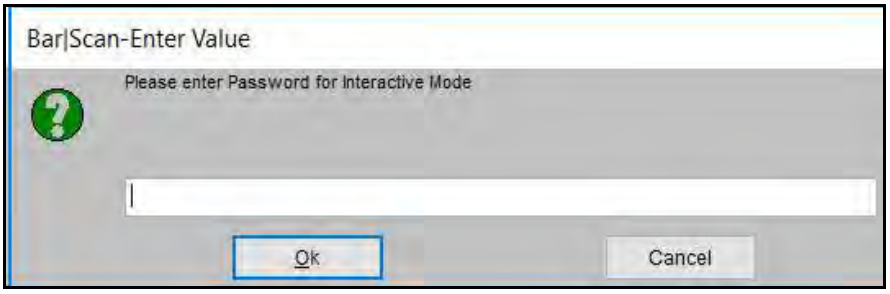
The Archive Process is called Log File Maintenance. Basically, a portion of the Activity Log File is copied to an Archive File based on an Archive Date that you select. It is not necessary to perform a Log File Maintenance until the Percent Slide approaches 80% full. This Slide is displayed in both graphical and numerical form next to the Log File Name.



For more information on Activity Logging, refer to *Chapter 14 - Import and Export.*

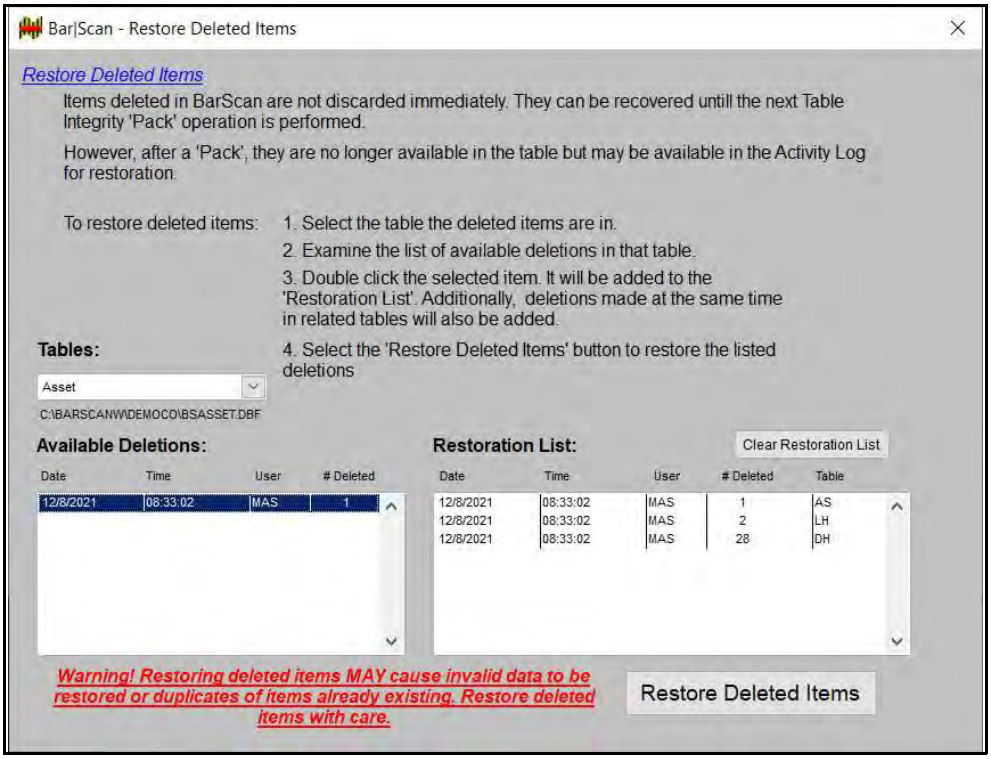
INTERACTIVE MODE

This is a technical support feature, and is therefore password protected. Normally, you will never have to access this feature. If there would ever be a need for you to use this feature, your Bar|Scan dealer will be able to give you the password, and explain it's uses and features.



RESTORE DELETIONS

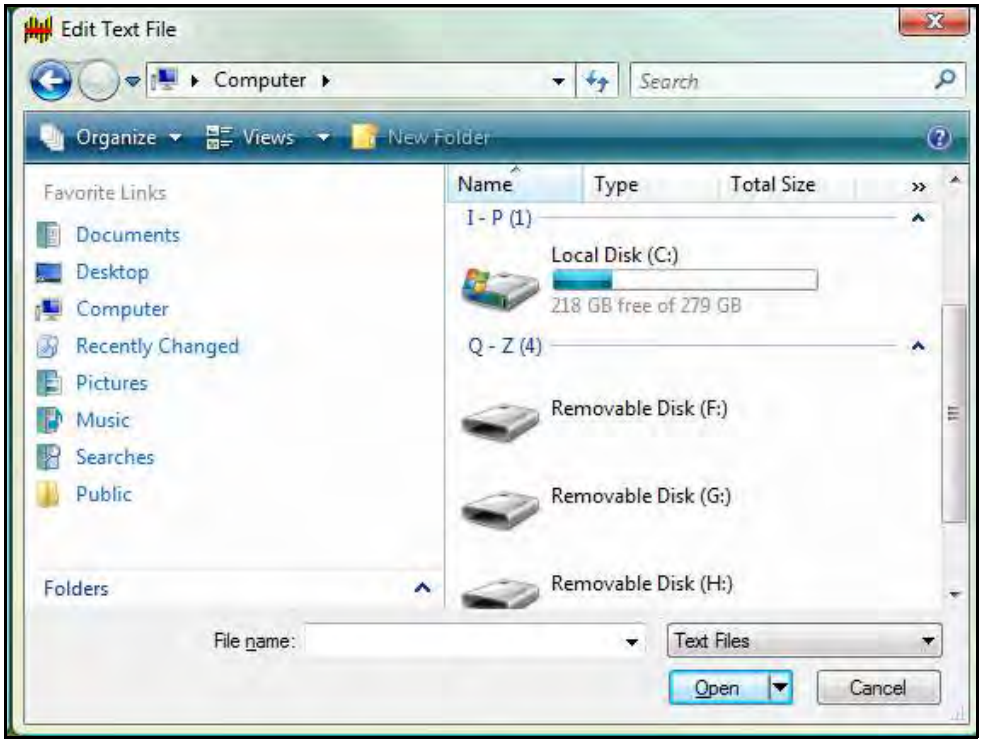
If you are a Master User (administrator) then Bar|Scan will permit you to restore any deletions from any table prior to a Pack operation. Instructions are on the panel as shown in the example below:



EDIT TEXT FILE

The Edit Text File feature, under Housekeeping, is much like a notepad, only inside Bar|Scan. You may use it to view any text file with a .txt extension, such as a text file that you have exported from Bar|Scan.

If you have selected Edit Text File from the Housekeeping drop down a menu, you will be shown a Look up Window similar to the one below.



From this window, you may select the folder and/or file that you wish to view, and edit.

IMPORT AND EXPORT

INTRODUCTION

The Import and Export features of Bar|Scan can provide you with three important features.

√ The ability to record and export asset information to other computer applications such as a GIS Tool or Fixed Asset Depreciation System. Or if you have a multiple company system, you can export (or data transfer) information to another company, i.e., catalogs, locations, organizations, and reports.

√ The ability to import information into Bar|Scan from another application database either as a method to initially populate the assets, or as part of an ongoing process of obtaining new information and updating Bar|Scan.

√ The ability to set up and use the **Activity Log** for every table which records *events* as they occur so that you have an Audit Trail. These events can then serve as an audit trail and printed, or, if desired can be exported. The **Activity Log Export Files** created for your use can be in a number of different formats including ASCII comma delimited, or Microsoft Excel.

In addition to the Import and Export feature, you may also export information using the Bar|Scan Report Feature. The process is discussed in the second section of this Chapter. For more information on the Bar|Scan Report Feature, see *Chapter 10 - Report Table*.

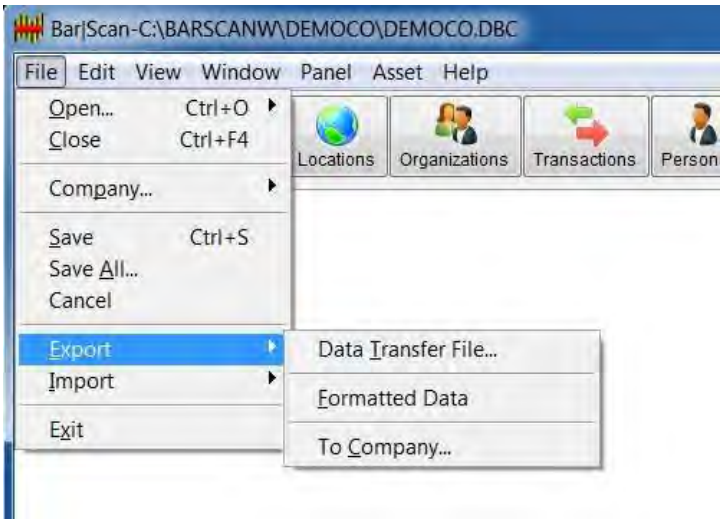
There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

The Chapter concludes with a section which documents a complete File Structure list for all tables in Bar|Scan. This will assist you in interfacing Bar|Scan with other computer applications.

EXPORTING FROM BAR|SCAN

When you want to select Export from the Main Menu, select File ...▸, then Export as shown on the following example. When you select Export from the File drop down menu, you will be shown three choices, as illustrated below.



The first item, Data Transfer File, will appear as "greyed out" until you have selected items to export. The second choice listed under Export, is Formatted Data. The third option says To Company, and will also appear as "greyed out" until you have selected an item, or range of items, to export.

The "Data Transfer File" option is used to export an item from one company, as a file, so that it may be imported to another company, which is not on the same network or system. This is also useful as a way to send information to your Bar|Scan Dealer to assist in technical support. for By default, when exporting, Bar|Scan only exports a copy of the items, therefore the original items remain in tact in the first company. This default option can be changed by you on your Company Settings Screen.

The “Formatted Data” option actually creates the specifications for the export file. This is used to create a structure which defines what the file you wish to export should look like. You can have one or more export files, each containing different information in different formats.

The “To Company” option actually creates an export of information that is to be placed into another Bar|Scan Company. For instance, you may use this feature to create an exact copy (some or all) of your Locations, Catalogs, Assets, Transactions, Organizations, or any information that exists in your first Company and place it into the second Company.

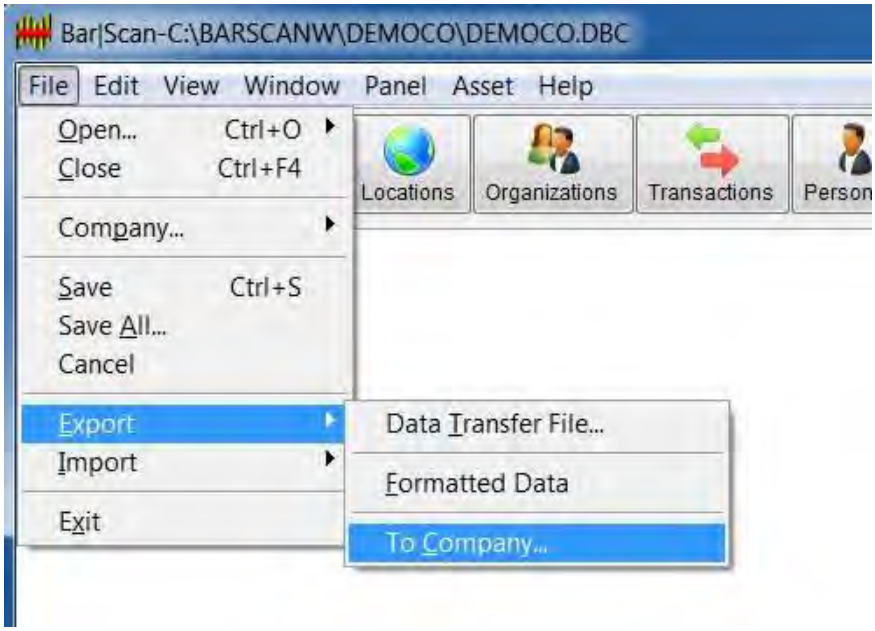
EXPORTING TO ANOTHER BAR|SCAN COMPANY

Bar|Scan makes it easy to export items to another Bar|Scan company that is on the same server. You can export Assets, Catalogs, Locations, Organizations, Reports, Transactions, as well as miscellaneous tables such as Condition and Status.

In order to complete this process, first open both the company that you wish to export from and the company or companies that you wish to export the items to. Select the Company you are going to export from. Go to the items that you wish to export, i.e., if you wish to export a report, open the type of report, and highlight the report you wish to export on the Browse panel using the Range feature.

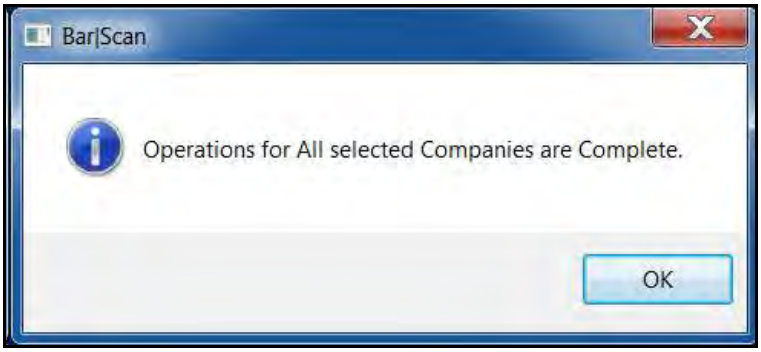
Note: All of the different items listed, Assets, Catalogs, Locations, etc, can be exported in a similar manner. You can either export one item or place a number of items into a range.

Then, go to the Main Menu, and select File ...▸, Export ...▸, then To Company, as shown below.



When you have selected the To Company option, you will see a window similar to the one below.

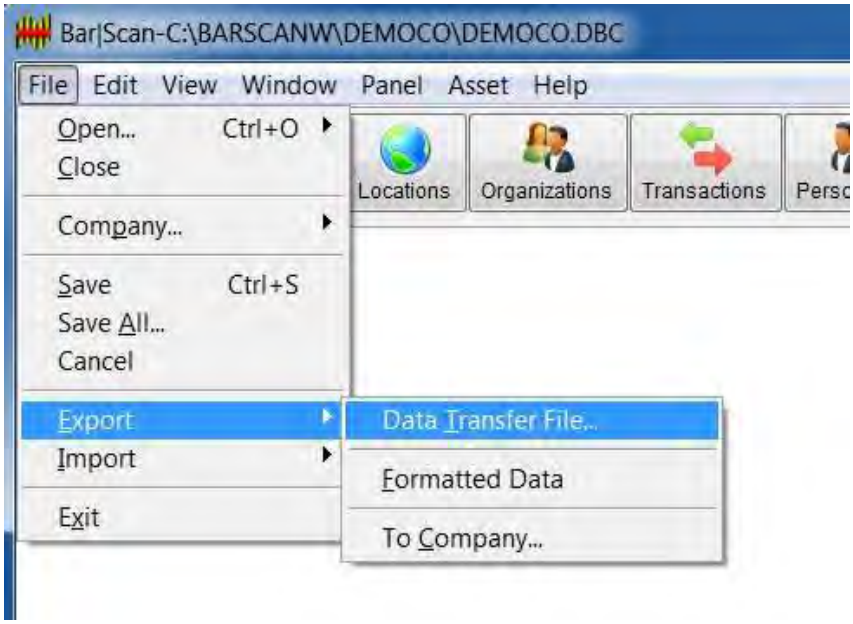
The items in the above box will change according to which and how many companies you have open. Select the Company (or Companies) you wish to export the report to, and click the Ok button. You will be shown the following message.



EXPORTING USING THE DATA TRANSFER FILE

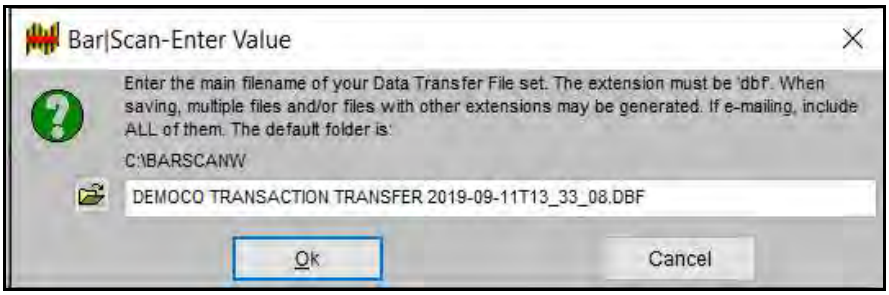
If you need to export items to a computer that is not networked to the first computer or you cannot open it in your installation of Bar|Scan, you will need to use the Export, Data Transfer File feature.

In order to use this feature, you would go to the company you want to export information from. You would highlight, with the Range feature, the information that you want to export. Then, you would go to the Main Menu, and select File . . .▸, then Export . . .▸, Data Transfer File as shown below.

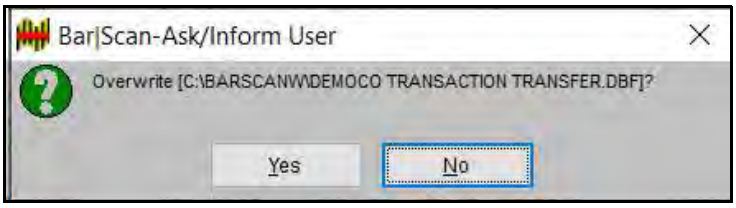


When you select the Data Transfer File, you will see a message asking if you really want to export the items that you have highlighted. For our example, we have highlighted 16 Transactions, as shown below. You are not limited to Transactions for your export.

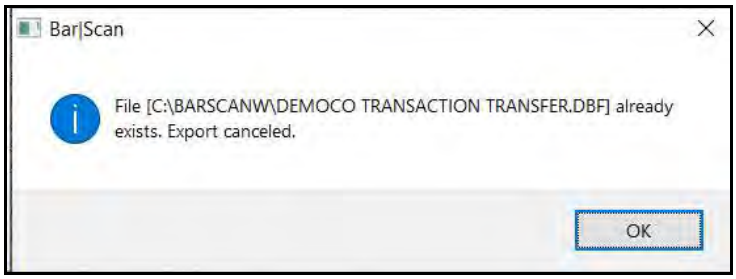
If you select the Yes, that you do want to export the items shown, Bar|Scan will begin the process, and show you a window where you can name the export file.



Bar|Scan appends the current date and time to the filename. If desired, you can change the file name shown in the above window to be a name that you will remember easily. If you do change the name and do not include the date and time, you may get the message if you export the file more than once, as shown below.



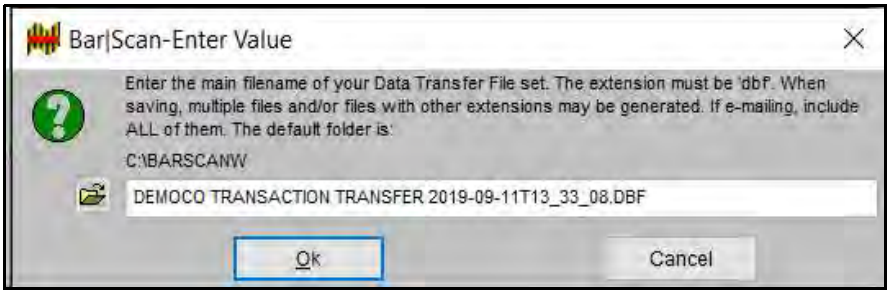
This message lets you know that a file with the same name already exists, and asks if you want the existing file to be overwritten. When you select the No button, you will see another dialog box like the one below.



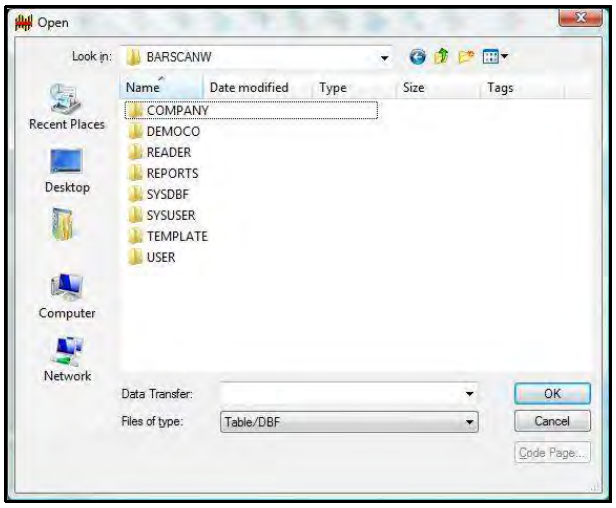
This message appears to let you know that the Export was not completed. If you had intended to export these Transactions to a file, please choose a different filename, and attempt the export again.

Always selecting a new file name will alleviate this problem.

If you want to give your file a new name, and perhaps place the file in a different path, you can push the folder button that is next to the file name field, and browse to the new location.



When you press on the file folder, you will be shown a window similar to the following.

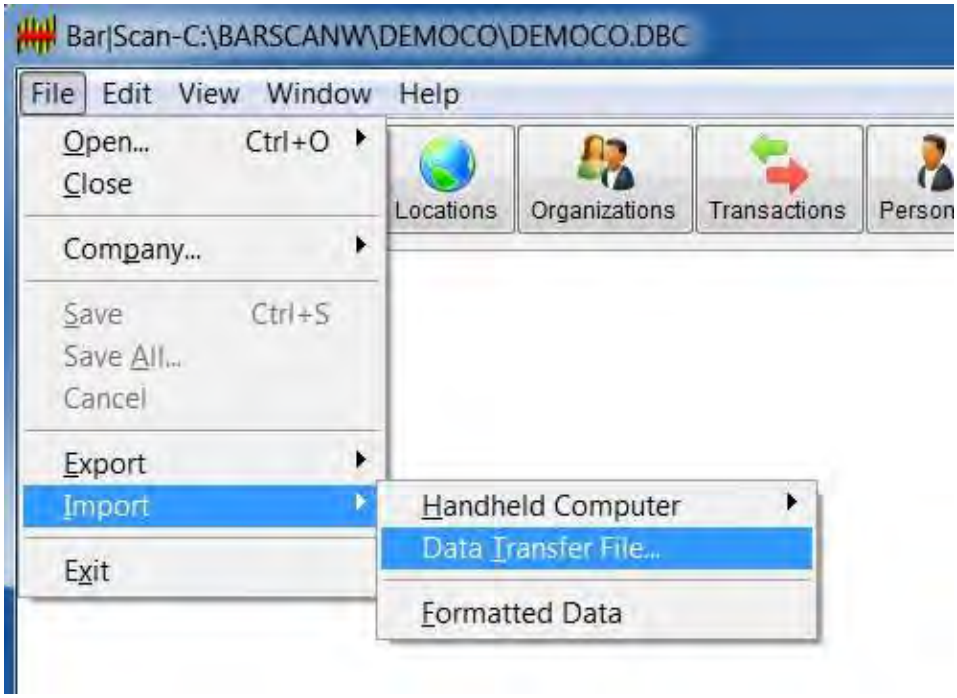


You may select a different destination on this window, and then click the Ok button. The new path will appear in the file name field.

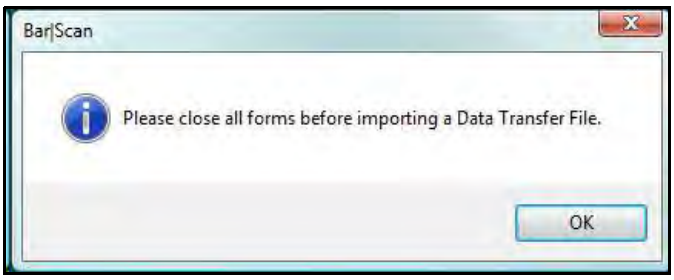
In some cases such as Reports, a single Data Transfer requires 2 files that contain different parts of the data. The file names are the same and the file extensions are .dbf and .fpt. When you import a Data Transfer, Bar|Scan automatically imports both. If both files are not available, Bar|Scan will indicate this to you.

To finish the process, you would need to import the file on the other computer. Following our example from the Export section, you would now have to go to the Main Menu, and open the Company that you want the Transactions to be imported to.

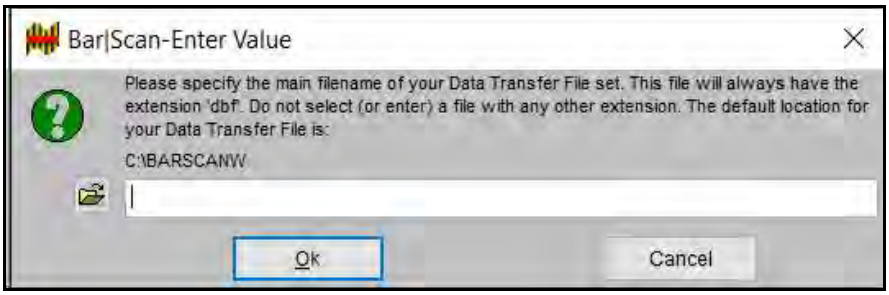
Then, go to the Main Menu, and select File . . .▸, Import . . .▸, then Data Transfer File as shown below.



If you have any other tables open (with the exception of the Main Menu), you will be shown a dialog box like the one below.

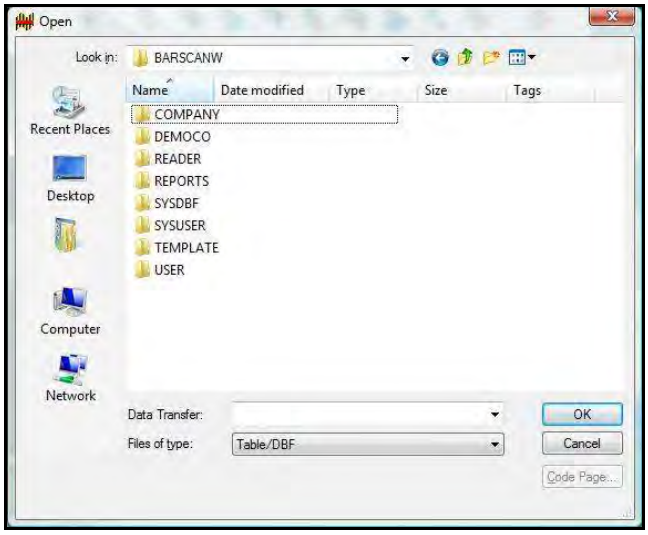


Simply close the open table, and then select File . . .▸, Import . . .▸, then Data Transfer File again. You will see a dialog box like the one below.

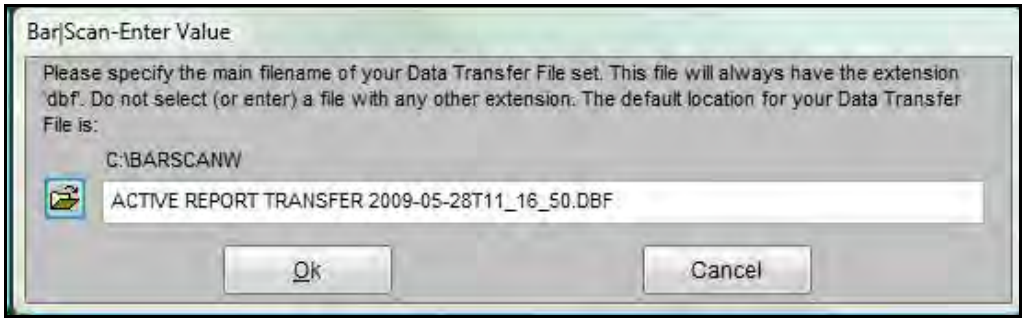


If you are unsure of the name of the file, you may click on the file folder button to the left of the empty field.

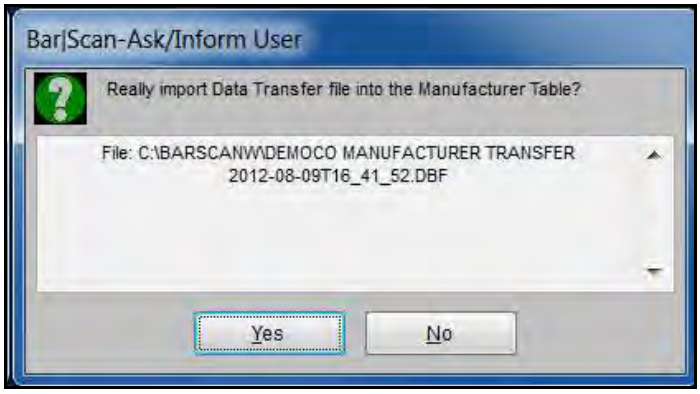
You will be shown a window like the one below, where you will be able to select the path and filename of the file you wish to import.



Choose the correct filename and click the OK button, and the filename will be placed in the previous dialog box as shown below.

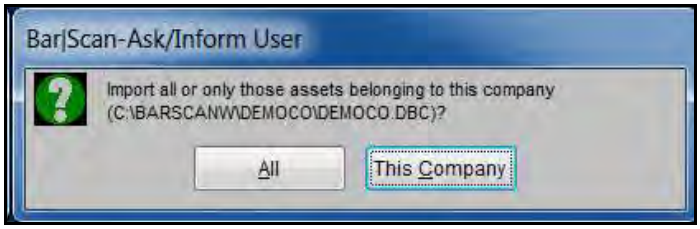


If you select the Ok button, you will see a dialog box similar to the one below.

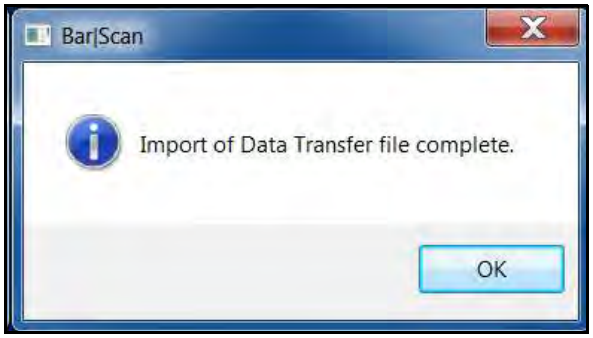


Note: The message in the above dialog box will change to reflect the filename that you have selected.

If you choose No, the dialog box will simply disappear and Bar|Scan will do nothing. If, however, you select the Yes button, you will see another dialog box similar to the one below.



This dialog box simply wants to know if it should use the Company Code field to determine which Company the Transaction should go into. If you are using the Company Code on your Transactions, you may select to only import the Transactions that belong to This Company.



You have just been through the entire process of selecting, exporting, and importing Transactions between companies on separate computers. This process is the same for the export and import of Locations, Organizations, Assets, Catalogs, and Reports.

Note: in some, but not all, circumstances the Bar|Scan Data Transfer Table may consist of more than one file. The prefix file name will always be the same, however, the suffix may end in a .FPT as well as the usual .DBF.

If Bar|Scan attempts to import only the .DBF file, and the .FPT file is not present in the same directory, you will receive an error message. You cannot do the import if the second file is missing.

If you need to send a Bar|Scan Data Transfer Table via email or some other means, remember to see if the Bar|Scan Data Transfer Table may consist of two files and attach both files to your email.

Typically the Data Transfer File will look like this:

*name-that-you-typed****.dbf***

and

*name-that-you-typed****.fpt***

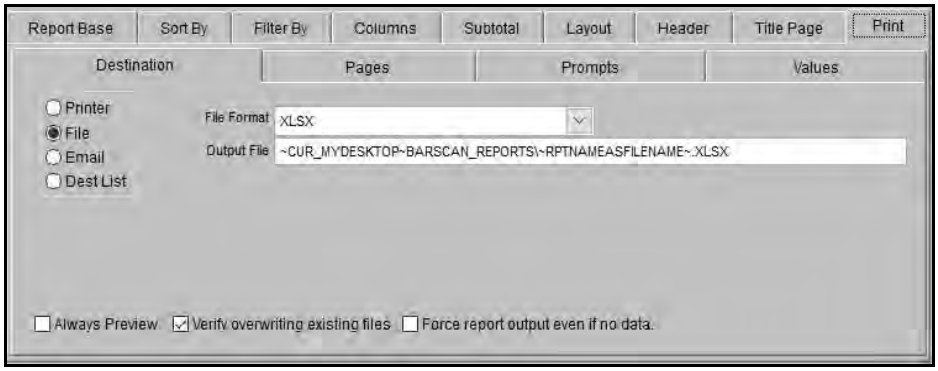
EXPORTING BY USING THE BAR|SCAN REPORT FEATURE

The Bar|Scan *Report* feature provides you with the ability to create files containing Bar|Scan data which can be transferred and used by different applications and computer systems.

The file can be created to contain any of the information items (fields) you desire. Then, you can direct the report output to a file (rather than to a printer) using one of several industry standard formats.

Creating a Report

A file is created by defining a report using the Bar|Scan Report table, then directing the output to a file (rather than the printer), and selecting one of the file formats.



As with any report you create using Bar|Scan, you can select any of the different fields, identify sorting sequence, and limit the number of records using the "filter" feature.

The *Destination* feature may include a particular file name, or you may use the Prompt For feature to enter a file name when the report is printed.

There are several file formats available to choose from. These are discussed in detail in *Chapter - 10 Report Table.*

EXPORTING TO OTHER SOFTWARE

There are two types of exporting that can be accomplished by Bar|Scan. The first is an export of one or part of the tables, i.e., Assets, Catalogs, Locations. The second is one of the Activity Log tables. Normally, you would export directly from one of the tables in Bar|Scan, however, some external systems, such as an accounting system, may require only specific changes to be imported. In this case, you would export an Activity Log table.

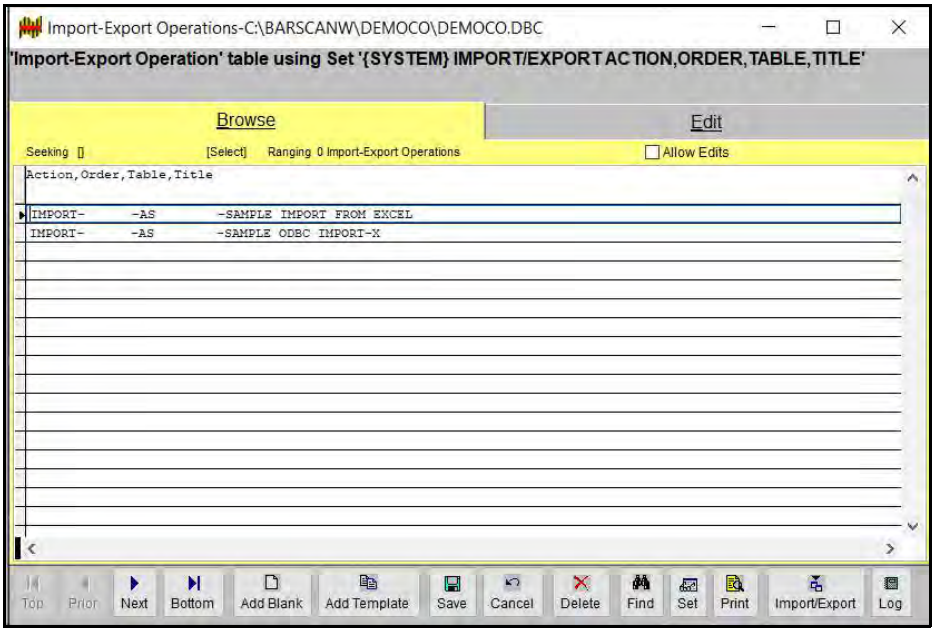
If you are using a Network version of Bar|Scan, the EXPORT feature requires exclusive use of the Bar|Scan tables during the actual time of the export.

While the Bar|Scan Activity Log keeps track of *events* as they occur, it does not create an Export file until you request it to do so by selecting the EXPORT feature.

Important: The length of time your computer will take to EXPORT the table or the Activity Log is dependent on the amount of Activities that have to be processed. Processing may take several minutes or longer for a large file of several thousand Activities. Do not interrupt the process by turning off the computer, rather start the Activity Log Export when you will not be needing your computer for some time.

Upon verification of a completed Export format file, the Activity Log is not emptied.

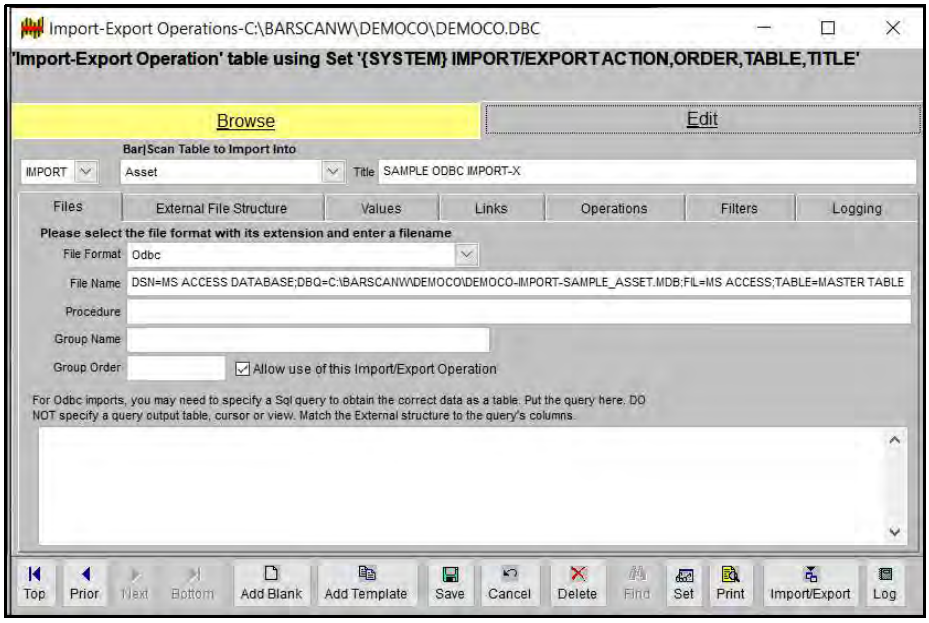
To export a table or Activity Log, you would first need to create an export format file. Go to the Main Menu, then select File . . .▸, Export . . .▸, Formatted Data, and when done, you will see a browse panel similar to the one below.



When you first open this Browse tab, you will not have any Exports or Imports listed, and you will have to start your process by Adding a Blank. Once you have added at least one Export or Import, you may select one of the them, select it and then select the Add Template button from the tool bar.

Whether you are adding from a blank or from a template, you can now select the Edit tab and make changes to the panel to create a new Export.

Then, select the Edit tab, and you will see a panel similar to the one below.



The Files tab is automatically selected when the Edit tab is shown.

Notice in the close up of the tool bar shown below, there are two new buttons on the far right.

The second to last button is used to start the actual Import/Export. When the cursor is placed over this button, it will say, Import/Export using ranged items. If none are ranged, then use all items in the current SET command.

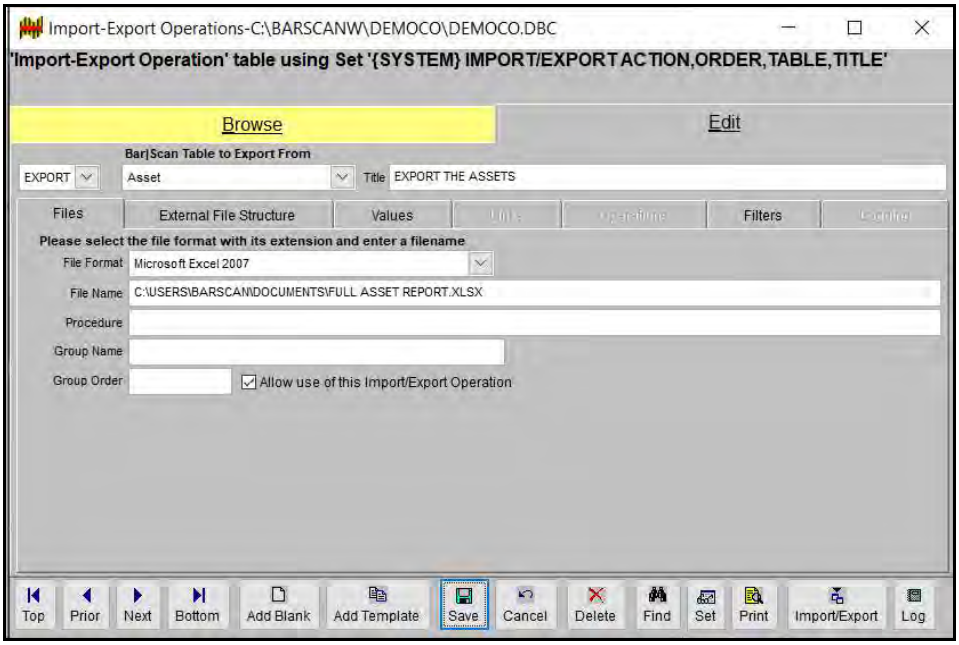
The last button is used to View, Edit and Print the Import/Export Log file, showing what did or did not happen during the Import/Export.

You may delete an Export of an Activity Log so that you do not inadvertently export the same information twice. For example, you export and clear the Activity Log at the end of every month. The Bar|Scan Activity Log is used to record *events* that occur to your assets. Recording events was done by using the LOG and the FIELDS features. The items exported are only those items that had activity during the month, based on your Log and Field criteria.

The Format File feature actually creates the specifications for the export file. This is used to explain to Bar|Scan what the file you wish to export should look like. You can have one or more export file formats, each with different information in a different format.

The Files Tab

There are four tabs that are accessible while in the Export mode on this Edit panel. The tabs which appear as greyed out are used for Import Format files. The first tab available in creating an Export Format is the Files tab, looks similar to the one below.



There are seven items on this screen, the File Format, the Import Method, File Name (including the path), an optional Procedure, Group Name, Group Order, and a checkbox that will allow use of this Import/Export Operation.

Additionally, for an ODBC import only, there is an optional area to create a specific SQL query to assist in data extraction.

Let us begin by choosing a file format. You may click on the down arrow next to the File Format field, to see a drop down menu to select from.

Available File Formats

DELIMITED - ASCII comma, quote delimited is the most popular personal computer export and import format. The information is converted to ASCII format which means that it can be read by even a word processor. The items are separated by commas. Alpha numeric items (which can contain both letters and numbers) are also enclosed with quotation marks. Choose from Delimited with Blank, Delimited, or Delimited with Tab.

CSV - The (Comma Separated Value) file format is a simple format that is supported by many Microsoft Programs such as Excel. It is also support by many database systems and programming languages. It is also a delimited data format that has fields separated by the comma character and records separated by newlines. Fields that contain a comma, newline, or double quote character, or which start or end with whitespace that is to be preserved, must be enclosed in double quotes. If a line contains a single entry which is the empty string, it must be enclosed in double quotes. If a field's value contains a double quote character it is escaped by placing another double quote character next to it. The CSV file format does not require a specific character encoding, byte order, or line terminator format.

DIF - Use DIF to import a .DIF (Data Interchange Format) file. This format was used by VisiCalc and is often still used by programs running on AS/400 and other midrange computers. Vectors (columns) and tuples (rows) are created from records and fields in the FoxPro .DBF. The export file name is assigned a .DIF extension if you do not include an extension in the filename.

FOXPLUS/DBASE - Foxplus is format compatible with FoxBASE+ and dBase III. If you are using Clipper or dBase IV, import your data from dBase III after the Bar|Scan export is complete.

FOXPRO - FoxPro is compatible with FoxPro version 2.x for DOS, and FoxPro version 3.0/5.0 for Microsoft Windows.

WK1 - Use WK1 to export to a Lotus 1-2-3 revision 2.x spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

XLS - Use XLS to export a Microsoft Excel version 2 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record. A .XLS extension is assigned if you do not include a file extension.

XL5 - Use XLS to export a Microsoft Excel version 5 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

XL8 - Use XL8 to export a Microsoft Excel 97 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

SDF - System Data Format - txt - is an industry standard for file formats and could be used when sending the report to a file which will be transferred to a different computer.

SDF puts the different fields into a disk file one field after another; the lengths of the individual fields determine the position of the field on each line in the file. Each line (record) in the file can contain number fields. However, the total number of characters in one line may not exceed 253. One line in the file (a record) can contain only the information associated with a single Asset number (with one exception, see the *Attributes Fields* section below).

The Bar|Scan system contains many fields, all of which cannot be included in a single SDF report file. You may select fields which, when all of the characters for each field are totaled, contain less than 253 characters.

The number of characters for each field is shown in the table below. Note that the field lengths may be changed as new features are added to Bar|Scan. Consequently, we recommend you allow some flexibility regarding field length in programs that will use the information.

Some fields will contain fewer characters than are allocated to the field. These fields will be filled with trailing space characters (ASCII character number 32). The first character in a field will be left justified.

SIF - This is Standard Interchange Format. It's derivative, CAPSIF, is sometimes used in the furniture sales industry. Each line of the CAPSIF begins with a two-character op-code, followed by an equal sign (=). followed by the data associated with the code. In all cases with Bar|Scan the data associated with these codes is less than 60 characters long. Only one type of information is specified for each line in the CAPSIF file.

The following is a detailed description of each of the CAPSIF codes used by Bar|Scan. The first five are used to define the specification file as a whole.

SF= Specification File name (drive:\path\filename.ext) as saved in Bar|Scan
ST= Specification Title, saved in Bar|Scan as the optional destination description
L1= User Label 1, saved in Bar|Scan as the Report Title # 1 line
L2= User Label 2, saved in Bar|Scan as the Report Title # 2 line
L3= User Label 3, saved in Bar|Scan as the Report Title # 3 line
PN= Product Number, saved in Bar|Scan as the Manufacturers Part #
PD= Product Description, saved in Bar|Scan as the Catalog Type and Description
MC= Manufacturer Code, saved in Bar|Scan as the Manufacturer Name
QT= Quantity, saved in Bar|Scan as the Quantity
TG= Tag #, saved in Bar|Scan as Manufacturers Tag #
GC= Catalog Number, saved in Bar|Scan as Catalog
ON= Attribute Numbers 1 through 7, saved in Bar|Scan as the Attribute Names
OD= Attributes 1 through 7, saved in Bar|Scan as the Attributes

For a more complete discussion on SIF format, refer to *Chapter 10 - Reports*.

Choose one of the available file formats by a clicking on it with your mouse, or pressing the associated hot key, or use TAB to move to the button and press ENTER.

If you are not sure which format is required for your application, choose ASCII Comma/quote delimited.

The Import Method

This feature is only used during an Import Format session and is discussed later.

The File Name

Bar|Scan will create and write the export file to the file name that you enter here. You may enter any valid Windows file name preceded by an optional path.

If no path is specified, the file will be created in your company subdirectory.

The file extension is optional. Bar|Scan will assign the extension based on the file format that you select.

Any existing file will be overwritten, so make sure it is not needed.

Procedure

This feature is optional, but using it, you can customize your export by calling a Procedure at the time of the export. A Procedure is a custom program written be a computer programmer to perform a special task. The program must be a FoxPro program. If a Procedure is entered, Bar|Scan will use it.

Most likely, you will not need a Procedure. Almost all exports can be completed without this process.

If you require a Procedure, see your Bar|Scan Dealer for more information

Group Name

Group Name is optional, but allows you to group Imports, range them, and then do one import after the other.

Group Order

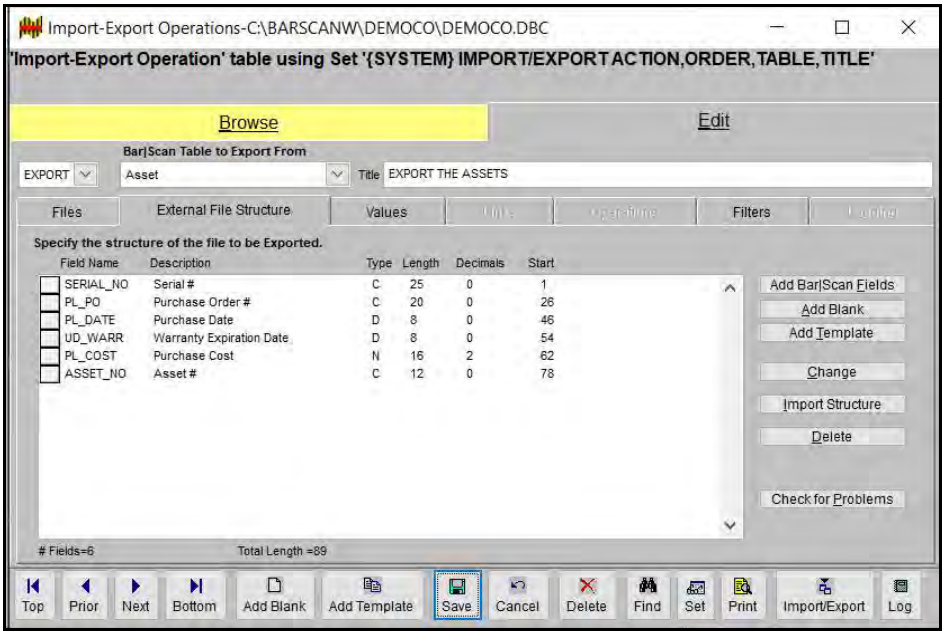
Group Order is optional, but allows you to decide which import needs to be completed first, and the order of the rest of the imports. I.e., if you are importing both Catalogs, Assets, Organizations, Locations, you could use this feature to make the import proceed in logical order importing first the Organizations, then Locations, then Catalogs, and finally Assets.

SQL Query

This area is for an ODBC import only and not used for exporting.

The External File Structure Tab

You complete this screen to tell Bar|Scan the structure of the file that you will be exporting. A sample External File Structure tab is shown below.



There are two types of information that a file contains. The first is *records*. Records are the number of items in the file. For example a file can contain 100 records corresponding to 100 assets. *Records* are also the equivalent of rows in a spreadsheet. The second type of information in a file are the *fields.* For example, an asset number, purchase order, and purchase price, are three *fields* of an asset. *Fields* are the equivalent of columns in a spreadsheet.

On this display screen, you will tell Bar|Scan what *fields* you wish to have in the file that you wish to export.

Before we proceed with the mechanics of describing the structure of the export file, we must distinguish between a *structured* file and a *non-structured* file.

√ A native structured file is an Excel, or MS SQL. Structured files can have their structure imported into Bar|Scan. This kind of import requires the support of software packages, drivers and providers, depending upon the nature of the data being imported. Additionally, since Bar|Scan is a 32 bit program often existing in a 64 bit context, being aware of how this will impact the import of your specific data is a requirement.

√ A native or non-structured file is all other formats including SDF, delimited and CSV. Non-structured files are easy to create, but they have to be entered one field at a time. Their structure cannot be imported.

Now going back to the display screen, the screen is separated into two areas. To the left is the list of fields and to the right are the actions. The mouse or TAB key will move from selection to selection.

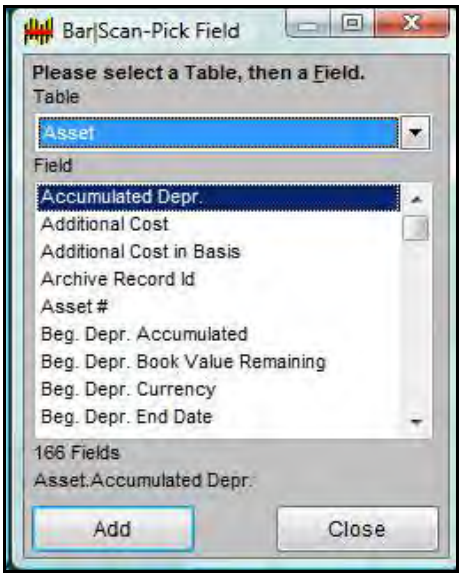
Double click an item with your mouse, or if it is selected, press ENTER to complete the selection process.

The left side of the display screen is either empty or displays one or more previously created fields. All Bar|Scan fields can be entered for export. You may use the arrow or TAB key to move from field to field.

You may also change the order of the fields by dragging them up or down. This is done by placing it on the up-down arrow symbol at the left of the format file name and moving the mouse up or down while depressing the left mouse button.

Adding a New Field

Normally you will select "Add Bar|Scan Fields," and you will be shown a look up window like the one below.

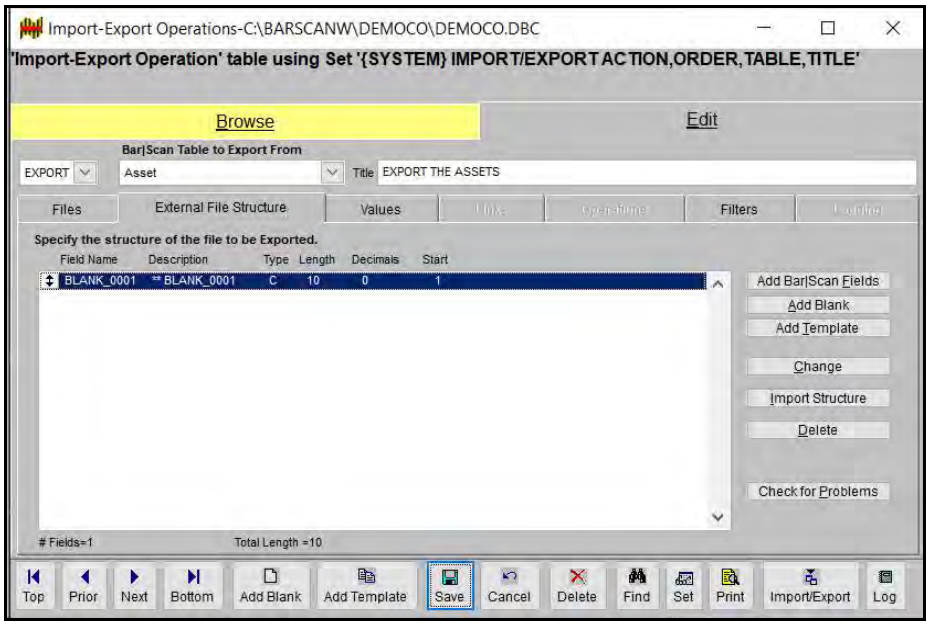


The Look up Window will list the fields in the appropriate table in Bar|Scan. Choose the Bar|Scan field in which you wish to export. If the table listed at the top of this window does not contain the information that you wish to export, you may use the down arrow next to the table name, and select the fields from a different table.

You can export from any of Bar|Scan's tables. Each Bar|Scan table and it's fields, field names, and default field sizes are listed at the end of this Chapter.

Or, to add a new field, you may select the Add Blank button, or the Add Template button.

If you select blank, you will see a line appear on the left-hand side, Blank0000, Blank0000, C, 10, 0 as shown below.



You will then need to change the line to say what you want it to.

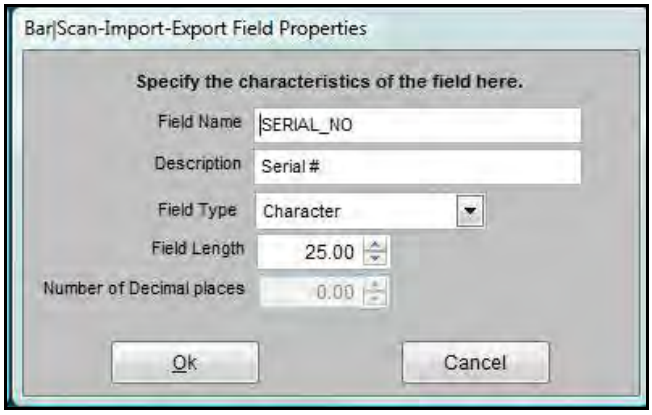
Normally, you will select a blank field if your external file contains one or more fields that you do not wish to export from Bar|Scan. For example, if the first field of the export file should be blank.

Bar|Scan will give it a default Field Name, Type, and Length. These can be adjusted by you. For example, if the field width is 8, you can change the length to 8 also instead of the Bar|Scan default of 10.

When you can select a line, and then select Add Template, a duplicate of the line you selected will appear, and you may change it to say what you want it to.

Changing an Existing Field

To Change an existing field, select the Change button. When you select Change, you will see a window like the one below.



You can change any field, as required. For example, if you wish to have your export file's serial number length to be 20, you will change the length on this screen from 25 to 20 (Bar|Scan's serial number field is 25 and will display as the default length).

Note on Bar|Scan's Time fields: Bar|Scan exports all time fields in the following character string format HH:MM:SS. Since it is a character string, it cannot be changed to a different format. If you are exporting th a Delimited format, quote marks will be added.

Importing a File Structure

Importing a file structure avoids the task of having to manually add each field to the display screen. Instead, you will let Bar|Scan complete the screen for you based on a file structure you would like to *match*. The file you wish to match must be an Excel, FoxPro, or dBase compatible file. These normally have the file extension .DBF.

To Import a File Structure to match, select the Import Structure button, and you will see a Look up Window like the one below.

Select the folder which contains the file structure that you wish to use, and Bar|Scan will automatically import the list of the file structure for you.

You will need to tell Bar|Scan where the file that contains the structure is on your computer's hard drive or network.

You might also need to adjust the File Type to "All Files (*.*) to locate the file you wish to import, otherwise only those files with a .DBF extension are displayed.

To complete your selection, click on the highlighted file name to select it and then click on the < Select > to return to the Export File Structure tab.

After selecting the file to import the structure from, you will see the file structures are filled in automatically.

Deleting an Existing Field

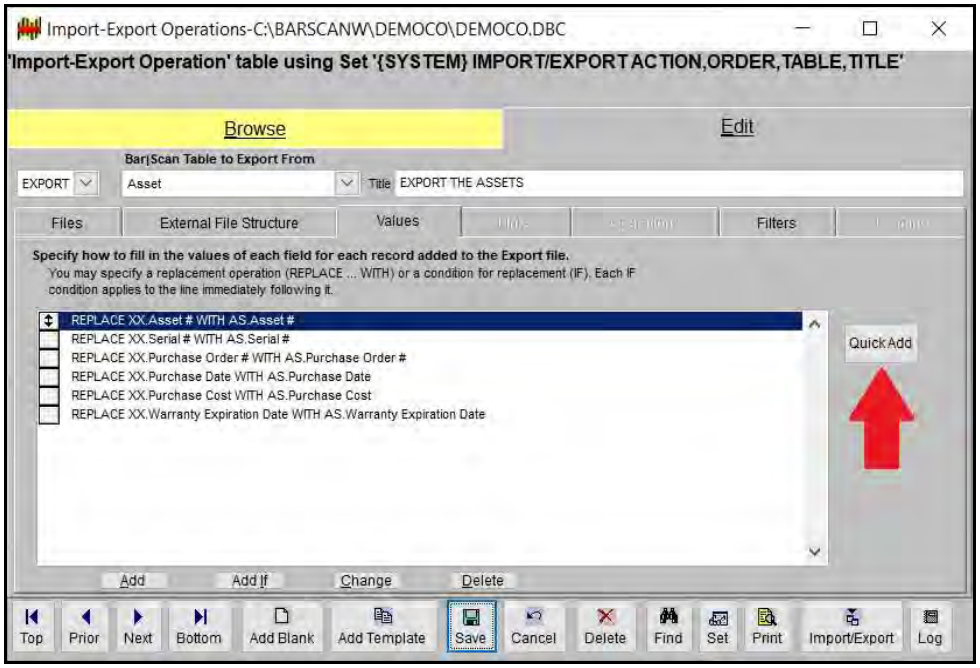
To Delete an existing field, select the field that you wish to delete, and then click the delete button with your mouse. You can delete any field, as required.

Check for Problems

Bar|Scan checks the fields on this Tab, and then provides a message if problems exist such as duplicate field names or invalid field sizes. You can then edit any field, as required.

The Values Tab

When you select the next tab, you will see the Values tab as shown below.



Use Quick Add button to check titles for Import field names to see if they match those you selected in the external file structure tab. If they match, this table will be filled in automatically.

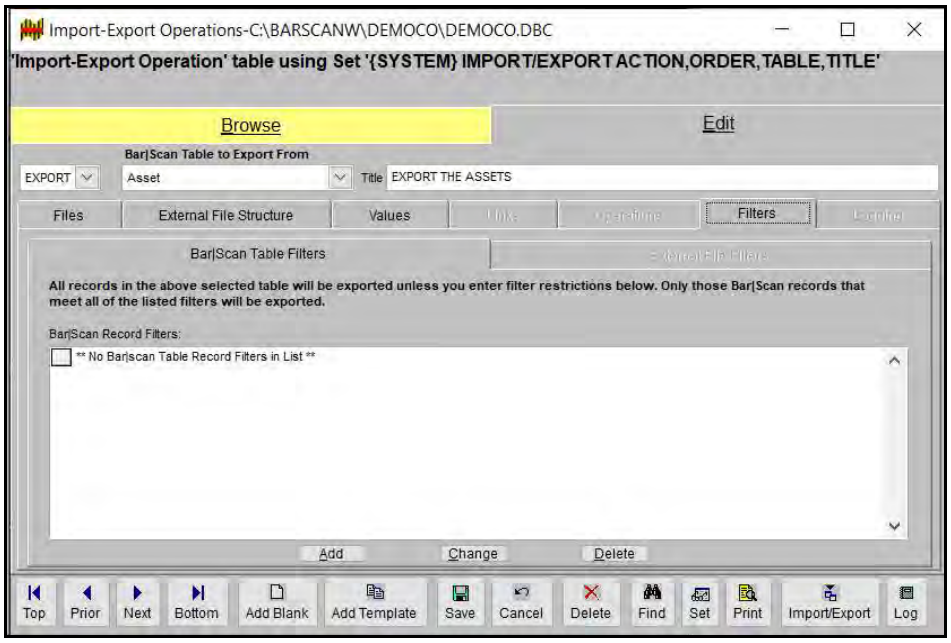
This tab allows you to specify how to fill in the values of each field. For instance, you may want to specify that you do not want serial numbers exported if the serial number is not currently a blank, by using the Add button. Or, you may want to use the Add If button, to specify an external filter, so that you will not import any information from any asset whose total cost is less than $200.00.

Note: If you use the Add If button, additional values will be indented. Each indented value after your Add If value will be filtered by the Add If criteria.

You may also use the Change and Delete buttons to alter or omit any items that were previously entered into this table.

The Filters Tab

When you select the last tab, you will see the Filters tab as shown below.



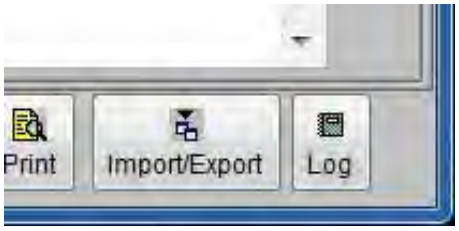
On this tab, you may add a filter, change a filter, or delete a filter for your export, i.e., you may wish to export only items from a certain Catalog Category, so by simply adding a filter on this tab saying that you want to filter on only the Category of EO, all other items will be eliminated from your export.

The External File Filters tab appears as greyed out, as it is used for Imports only.

Executing the Export

When you have completed your Export Format File, you are ready to execute the export instructions contained within it.

Notice in the close up of the tool bar shown below, there are two new buttons on the right.

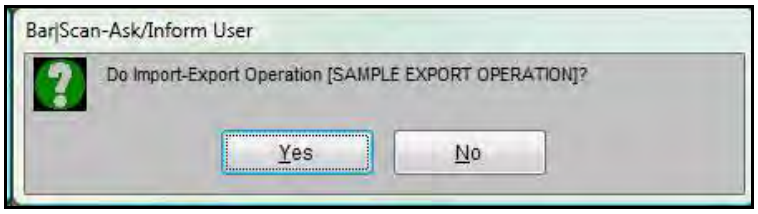


The second to last button is used to start the actual Import/Export. When the cursor is placed over this button, it will say, Import/Export using ranged items. If none are ranged, then use all items in the current SET command.

The last button is used to View, Edit and Print the Import/Export Log file.

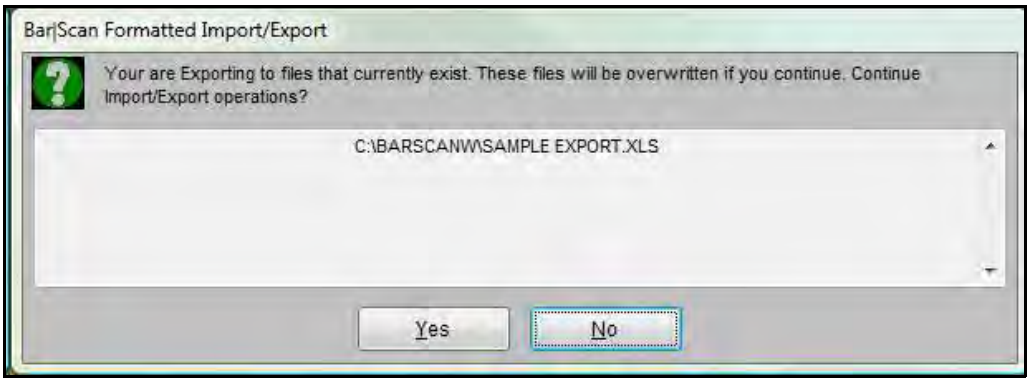
Simply select the Format File that you want to export, and then select Import/Export icon on the tool bar.

You are asked if you want to go ahead and do the export.



If you answer **NO**, you will be returned to the Import/Export Format File Menu.

If you did a previous export and did not delete the file, you will notified that the file will be overwritten.



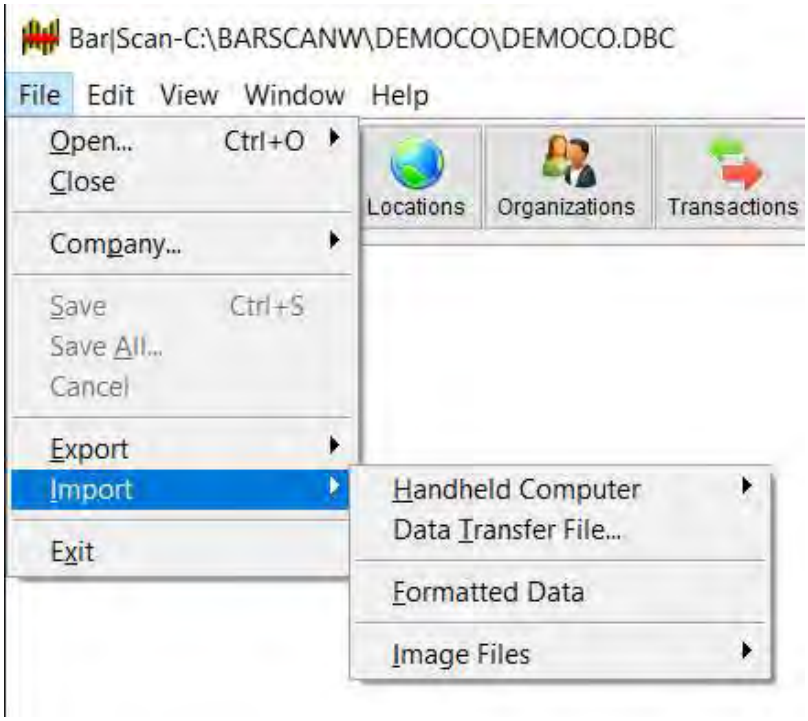
If you answer **NO**, you will be returned to the Import/Export Format File Menu

If you answer YES, the file will be created and the following dialog box will appear.

Click on OK, and your file is ready to be accessed by your other system.

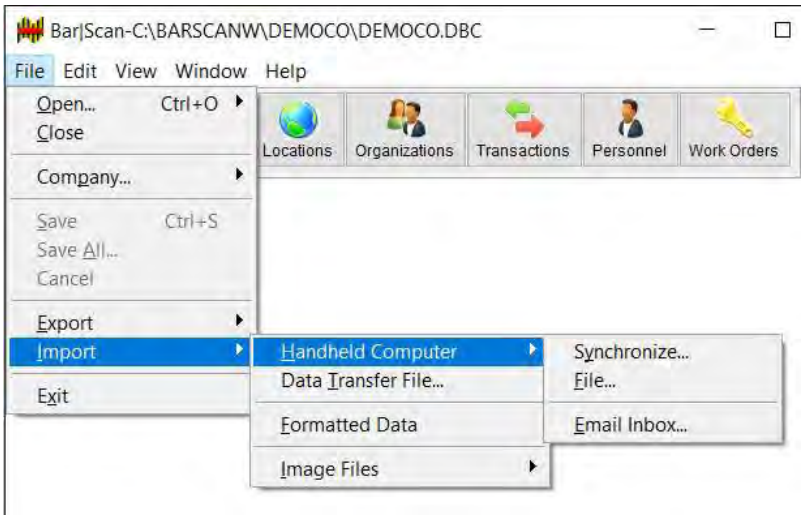
IMPORTING INTO BAR|SCAN

When you want to select Import from the Main Menu, select File ...▸, then Import as shown below.



When you select Import from the File drop down menu, you are shown four choices, as illustrated above. The three choices for your import are: Handheld Computer, Data Transfer File, and Formatted Data.

The first choice under Import is the Handheld Computer is shown below.



1. The Handheld Computer has three selections of it's own. They are: Synchronize, File and Email.

   Handheld Computer Synchronize is used to communicate with the Handheld Computer.

   Handheld Computer File is used to import a previously Synchronized Handheld Computer file.

   Email Inbox is used to import Handheld Computer synchs that were sent to your Microsoft Outlook email inbox.

2. The second selection, Data Transfer File, is used to import the previously exported data transfer file created, see the file created in this chapter under the Export section.

3. The third selection, Formatted Data, is used to import information into Bar|Scan using the specific criteria established in the Bar|Scan Format table, i.e., use to create structure for importing from another system or software.

4. The last selection, Image Files, is used to import images and is discussed in detail in Appendix B - Images.

IMPORTING FROM OTHER APPLICATIONS

Importing into Bar|Scan can originate from many different computer applications. For each of your imports, you will need to create an Import Format in Bar|Scan. The Import Format provides detailed instruction to Bar|Scan so that it can properly structure the external file that you wish to import and how the file will populate the corresponding Bar|Scan Table.

Once you have created your Import format instructions, you can use it over and over again. This is especially useful if you import information regularly, i.e. on a regular monthly basis.

You can even use Bar|Scan's XML Instruction File feature to execute imports in a fully automated timed manner.

Do not use an ODBC link to change Bar|Scan data as we cannot provide technical support for your Bar|Scan system. A better way to import is to use the Import/Export Module, as Bar|Scan will automatically check all data for compatibility prior to doing the import. Importing data directly into Bar|Scan using methods other than the Formatted Data is not encouraged and is not supported.

Creating an Import Format

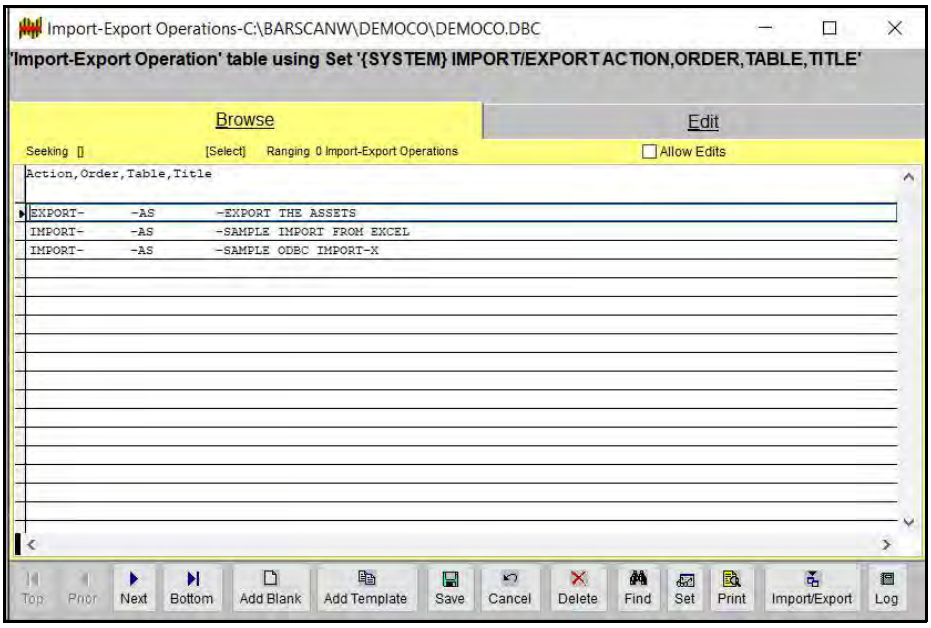
You can only import to one Bar|Scan table at a time, however, it is not uncommon to import to several Bar|Scan tables as part of one import process. For example, to add a new asset, you will import to either the Transaction Table, **or** the Asset *and* Location History Table. To import into the Asset and Location History Table, you will create an Import Format for each table.

Bar|Scan will not allow you to import information if it means that the information creates an incomplete asset record. For example, Bar|Scan will not allow you to import *new asset* information into the Asset Table if you are not also importing the corresponding Location History, Catalog, Location, and Organization information. Of course, you can import *new asset* information if the corresponding Catalog, Location, and Organization information already exists in their respective tables.

For this reason, it is often easier to import new asset information into the Transaction Table as the import rules are less restrictive.

How do I know which tables I need to update? Since almost all situations are unique, consult the Knowledge Base on our website or your Bar|Scan Dealer for guidance on which tables need to be updated.

When you want to use the Import feature to import a file, you would need to go to the Main Menu, then select File ...▸, Import ...▸, Formatted Data, and when done, you will see a browse panel similar to the one below.



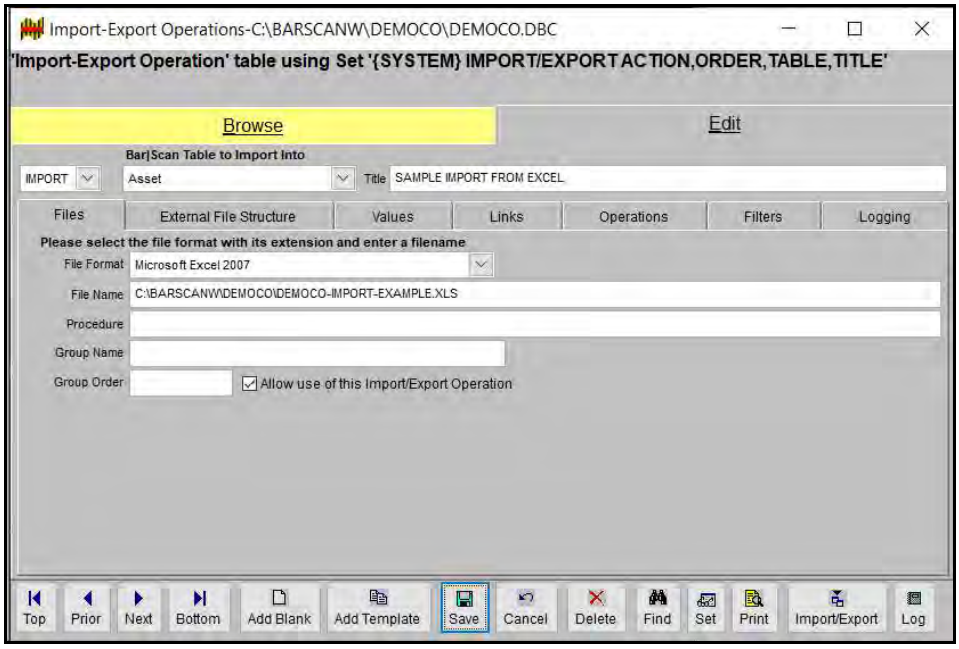
If you have not yet created an import format, select the Add Blank button from the tool bar, or select an Import file from the list, and then select the Add Template button from the tool bar. When you have selected your choice of Add functions, click on the Edit tab.

Each import file format is given a file name, and selected drive and directory where Bar|Scan will expect to see the file.

You may also delete an existing format, by selecting the desired file format, Range the format using the F4 Range feature, and then selecting the Delete button.

As mentioned before, format actually creates the specifications for the file which you will be importing into Bar|Scan. This is used to explain to Bar|Scan what the file you wish to import looks like. You can have several import files update one Bar|Scan table such as the Asset Table. In either case, you must tell Bar|Scan what the file looks like and what information and under what conditions you wish to import.

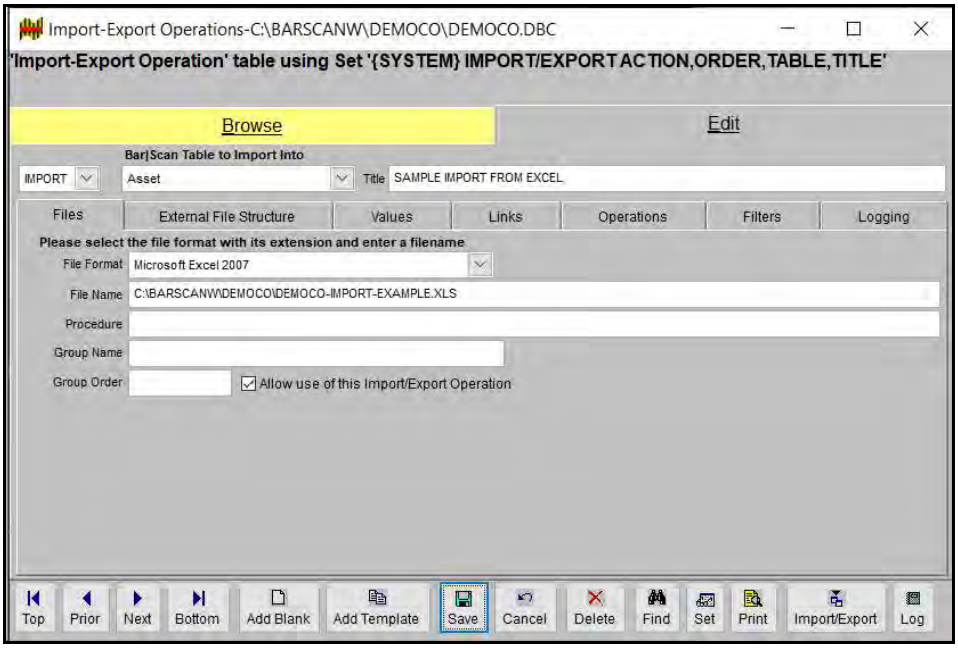
When you select the Edit tab, you will be shown a panel similar to the one below.



The above screen allows you to create your import format.

The Files Tab

After selecting the Edit tab, you will be presented with seven tabs that make up the format process for the import. While this may seem like a lot of information to complete, in almost all cases it is much easier than having a computer programmer write a special program to import the information. The first of those tabs, the Files tab, is shown below.



There are five things to complete on this screen, the File Format of the file to be imported, the Import Method, the File Name - including the path, an optional Procedure, the Optional Group Name, and the optional Group Order. Let us begin by choosing a file format. Each format is explained in the following section.

Available File Formats

DELIMITED - ASCII comma, quote delimited is the most popular personal computer export and import format. The information is converted to ASCII format which means that it can be read by even a word processor. The items are separated by commas. Alpha numeric items (which can contain both letters and numbers) are also enclosed with quotation marks. Choose from Delimited with Blank, Delimited, or Delimited with Tab.

CSV - The (Comma Separated Value) file format is a simple format that is supported by many Microsoft Programs such as Excel. It is also support by many database systems and programming languages. It is also a delimited data format that has fields separated by the comma character and records separated by newlines. Fields that contain a comma, newline, or double quote character, or which start or end with whitespace that is to be preserved, must be enclosed in double quotes. If a line contains a single entry which is the empty string, it must be enclosed in double quotes. If a field's value contains a double quote character it is escaped by placing another double quote character next to it. The CSV file format does not require a specific character encoding, byte order, or line terminator format.

DIF - Use DIF to import a .DIF (Data Interchange Format) file. This format was used by VisiCalc and is often still used by programs running on AS/400 and other midrange computers. Vectors (columns) and tuples (rows) are created from records and fields in the FoxPro .DBF. The export file name is assigned a .DIF extension if you do not include an extension in the filename.

FOXPLUS/DBASE - Foxplus is format compatible with FoxBASE+ and dBase III. If you are using Excel or dBase IV, export your data to dBase III before importing into Bar|Scan.

FOXPRO - FoxPro is compatible with FoxPro version 2.x for DOS, and FoxPro version 3.0/5.0 for windows.

ODBC - Open Database Connectivity (ODBC) provides a standard software API method for using database management systems (DBMS). ODBC is aimed to make it independent of programming language, database system and operating system.

This means that Bar|Scan can import from many different databases as long as they are ODBC compliant. In other words, the software provides a database driver that interprets the data in a standardized way.

WK1 - Use WK1 to import a Lotus 1-2-3 revision 2.x spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

XLS - Use XLS to import a Microsoft Excel version 2 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record. A .XLS extension is assigned if you do not include a file extension.

XL5 - Use XLS to import a Microsoft Excel version 5 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

XL8 - Use XL8 to import a Microsoft Excel 97 spreadsheet. Each column in the spreadsheet refers to a field; each row in the spreadsheet refers to a record.

An Important Note about Importing from Excel into Bar|Scan

The following are some important Excel format issues. They are not Bar|Scan import issues.

If the column width in your spreadsheet is narrow enough to hide data, the hidden data will be cut off when you convert your Excel file to a .DBF format (Bar|Scan compatible file). Excel is exporting your data based on what you see on your screen. This problem exists in all versions of Excel including Excel 97 and Excel 2000. Stretching the columns to display all of the data while you are still in Excel resolves this problem.

In order to avoid other potential problems, it is important to Format all of your Columns in your spreadsheet as either "Text", "Date" or "Number". Do not leave them in the Excel default "General".

While not formatting your columns may have no impact, it is always a good habit to take this extra step. For example, if you do not change a column containing dates to be a "Date" field, internally Excel saves the information as a number and would also export the information as a number rather than a date. Bar|Scan will not import a number into a date field and you would be unexpectedly left with a blank date.

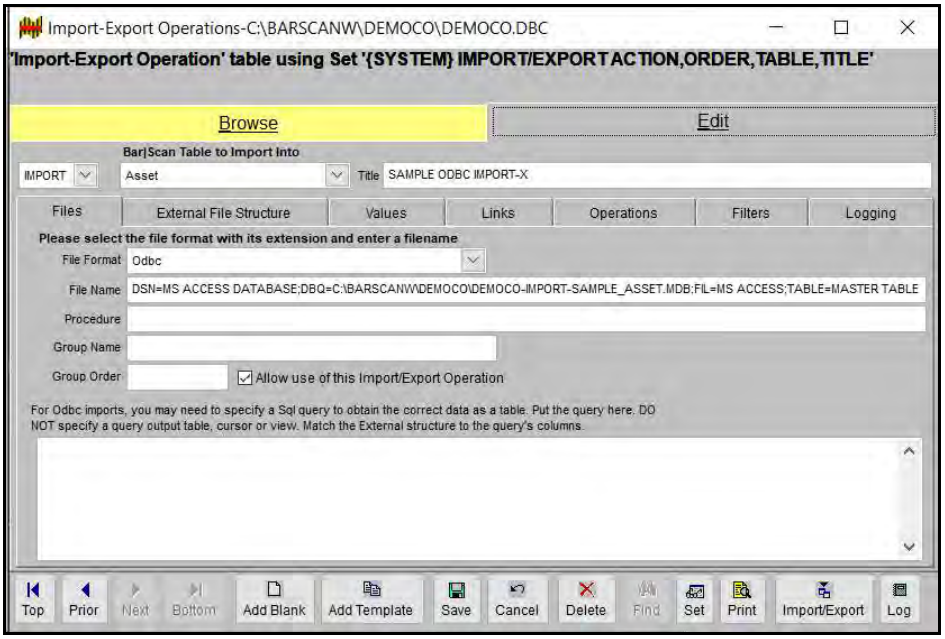
It is best to keep titles, boxes, graphics, calculations, totals, and other formatting out of spreadsheets that you will be importing into Bar|Scan. Keep you spreadsheet as simple as possible.

The Import Method

The are two Import Methods supported, File and OLE (Object Linking and Embedding. Since OLE is a Microsoft standard, it is only supported in imports from Microsoft Excel or ODBC (Open DataBase Connectivity).

ODBC is a standard database access method developed by Microsoft Corporation. The goal of ODBC is to make it possible to access any data from any application, regardless of which database management system (DBMS) is handling the data. ODBC manages this by inserting a middle layer, called a database driver , between an application and the DBMS. The purpose of this layer is to translate the application's data queries into commands that the DBMS understands. For this to work, both the application and the DBMS must be ODBC-compliant that is, the application must be capable of issuing ODBC commands and the DBMS must be capable of responding to them. Since version 2.0, the standard supports SAG SQL.

If you select ODBC, the Files tab will change as shown below.



After selecting ODBC, for example, you will need to create a data source.

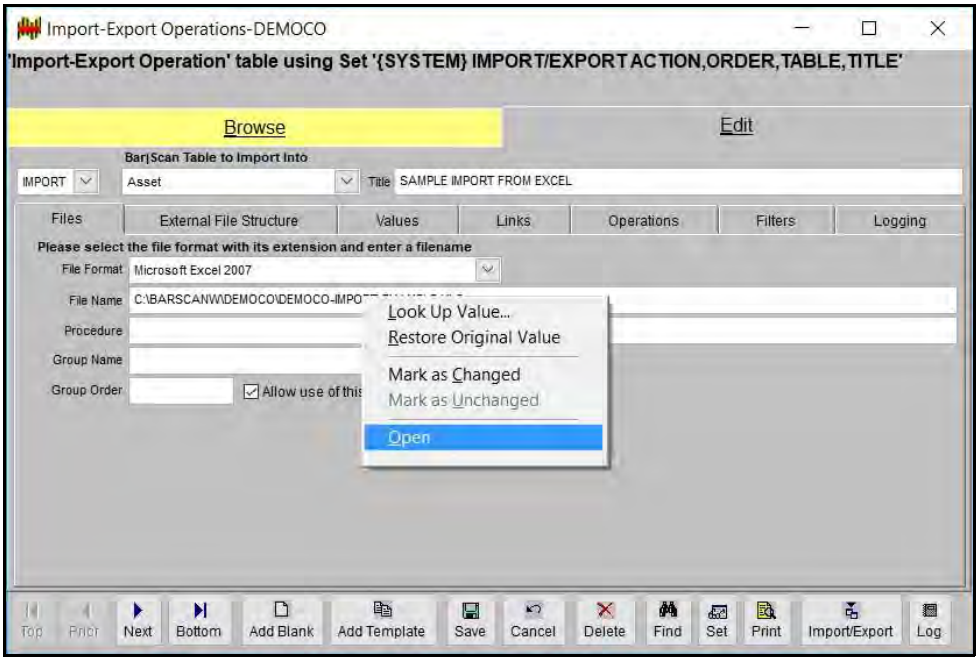
The File Name

Bar|Scan will read the import file that you enter here. You may enter any valid Windows file name preceded by an optional path.

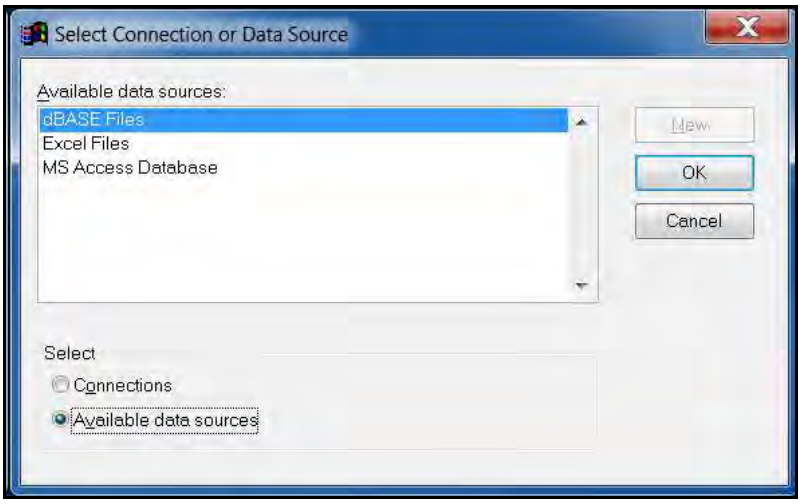
If no path is specified, Bar|Scan assumes the file is in your company subdirectory.

The file extension is optional. Bar|Scan will assign the extension based on the file format that you select.

You can right-click on the field and a menu will be presented to you. You can select Open and Windows File Explorer can be used to locate your file as shown in the example below:



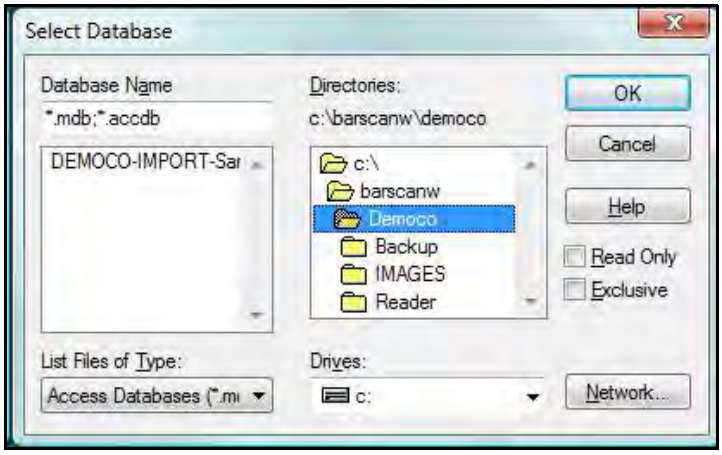
If you setup an ODBC, you will need to connect to a data source. Right-clicking in the File Name field will start this process and you will see a window similar to the one below.



The data sources available on your computer may be different than the ones in the above list. The list is dependent on what applications you have installed on your computer.

If the data source that you are interested in connecting to is not in the list, it may be available for download from Microsoft or another vendor.

Once you have selected your data source, you can continue to setup the link as shown in the screen below.



In the above example, we have selected Microsoft Access, and we need to tell Bar|Scan where the files are located. Note: Each Access database is stored as an mdb file and cannot be imported as a flat file such as a text file.

Once you have told Bar|Scan where the file is located, you will be asked additional questions such as which file contained in the mdb you wish to import from. Since there are many different ODBC compatible file formats, we have chosen not to display all of the permutations.

Procedure

This feature is optional, but using it, you can customize your import by calling a Procedure at the time of the import. A Procedure is a custom program written be a computer programmer to perform a special task. The program must be a FoxPro program. If a Procedure is entered, Bar|Scan will use it.

Most likely, you will not need a Procedure. Almost all imports can be completed without this process.

If you require a Procedure, see your Bar|Scan Dealer for more information.

Group Name

Group Name is optional, but allows you to group Imports, range them, and then do one import after the other.

Group Order

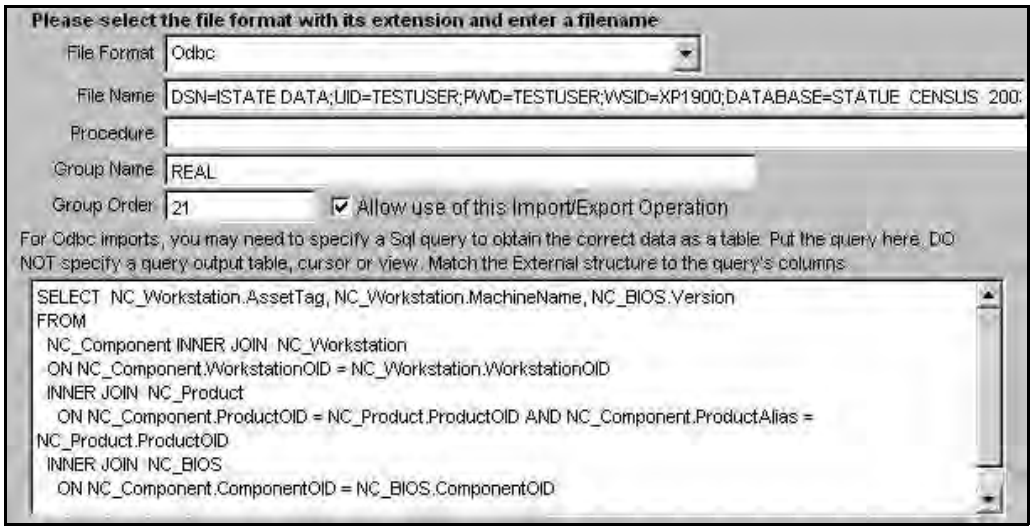
Group Order is optional, but allows you the option of deciding which import needs to be completed first, and then the order of the rest of the imports, i.e., if you are importing both Catalogs, Assets, Organizations, Locations, you could use this feature to make the import proceed in logical order importing first the Organizations, then Locations, then Catalogs, and finally Assets.

Allow use of this Import/Export Operation

Normally enabled, you can disable the ability of this format file to be used.

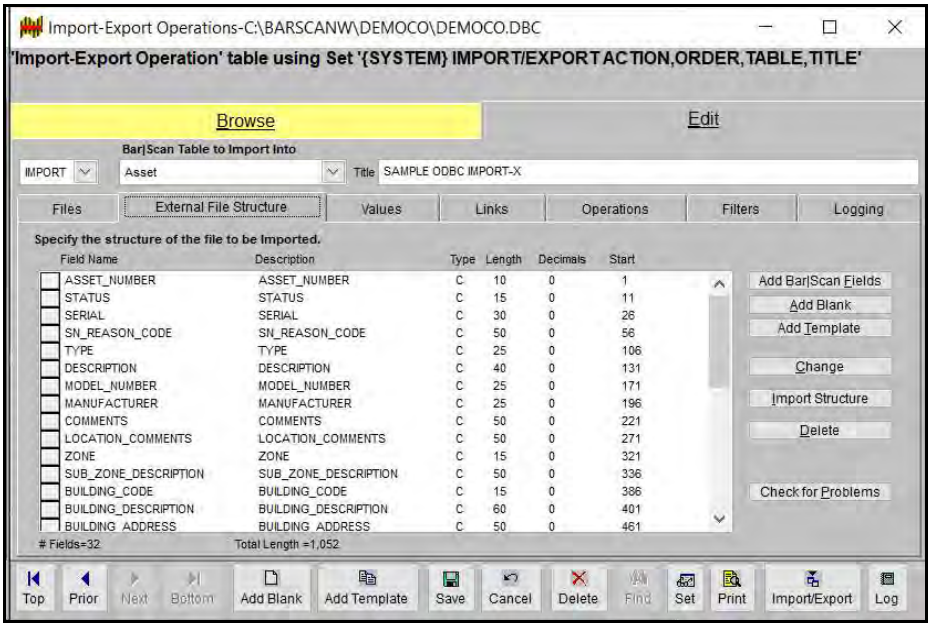
Optional SQL Query

This is a free-form data entry area where you can specify a SQL query to obtain the correct data as a table. You will need to match the External Structure to the query's columns. Here is an example of a SQL Query to obtain the correct data.



The External File Structure Tab

Select the second tab, the External File Structure tab, and you will see a table like the one below.



You complete this screen to tell Bar|Scan the structure of the file that you will be importing.

There are two types of information that a file contains. The first is *records*. Records are the number of items in the file. For example a file can contain 100 records corresponding to 100 assets. *Records* are also the equivalent of rows in a spreadsheet. The second type of information in a file are the *fields*. For example, an asset number, purchase order, and purchase price, are three *fields* of an asset. *Fields* are the equivalent of columns in a spreadsheet.

On this tab, we will tell Bar|Scan what *fields* are in the file that you wish to import.

Before we proceed with the mechanics of describing the structure of the import file, we must distinguish between a *structured* import file and a *non-structured* file.

√ A structured file is an Excel, or dBase III file. If you are using Excel or other applications that can create a dBase file, export your data first to a dBase III compatible file prior to importing into Bar|Scan. Structured files can have their structure imported into Bar|Scan. A structured file is easier to import than a non-structured file, as we will see later, because the structure can be imported instead of manually entered.

√ A non-structured file is all other formats. Non-structured files are converted by Bar|Scan into a structured file, but they have to be described to Bar|Scan one field at a time. Their structure cannot be imported.

Now going back to the display screen, the screen is separated into two areas. To the left is the list of fields and to the right are the actions. The mouse or TAB key will move from selection to selection.

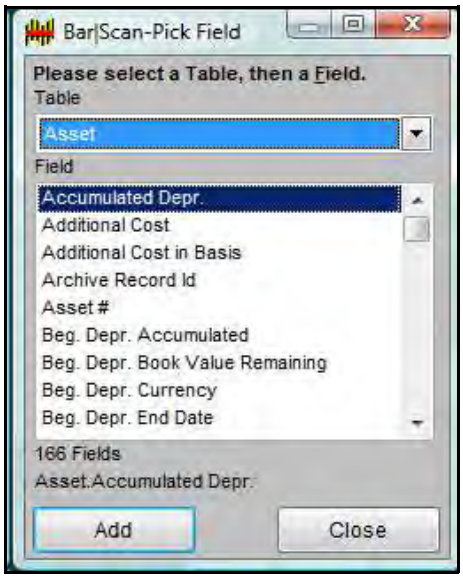
Double click on your mouse, or press ENTER to pick a selection.

The left side of the display screen is either empty or displays one or more previously created fields. There are an infinite number of fields that can be created. You may use the arrow or TAB key to move from field to field.

You may also change the order of the fields by dragging them up or down. This is done by placing it on the up-down arrow symbol at the left of the format file name and moving the mouse up or down while depressing the left mouse button.

Adding a New Field

Normally you will select "Add Bar|Scan Fields." You will be shown a look up window like the one below.



The Look up Window will list the fields in the appropriate table in Bar|Scan. Choose the Bar|Scan field in which you wish to export. If the table listed at the top of this window does not contain the information that you wish to import, you may use the down arrow next to the table name, and select the fields from a different table

You can export from any of Bar|Scan's Tables. Each Bar|Scan Table and it's fields, field names, and field sizes are listed at the end of this Chapter.

To add a new field, you may select the Add Blank button, or the Add Template button.

If you select blank you will see a line appear on the left-hand side, Blank0000, Blank0000, C, 10, 2 ---and you will then need to change the line to say what you want it to.

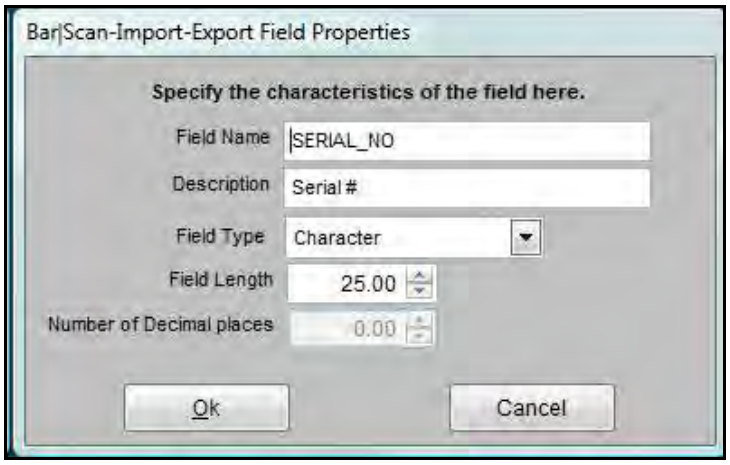
Normally, you will select a blank field if your import file contains one or more fields that you do not wish to export from Bar|Scan. For example, if the first field of the export file should be blank.

Bar|Scan will give it a default Field Name, Type, and Length. These can be adjusted by you. For example, if the field width is 8, you can change the length to 8 also instead of the Bar|Scan default of 10.

When you can select a line, and then select Add Template, a duplicate of the line you selected will appear, and you may change it to say what you want it to.

Changing an Existing Field

To Change an existing field, select the Change button. When you select Change, you will see a window like the one below.



You can change any field, as required. For example, if your import file's serial number length is 20, you will change the length on this screen from 25 to 20 (Bar|Scan's serial number field is 25 and will display as the default length).

Importing a File Structure

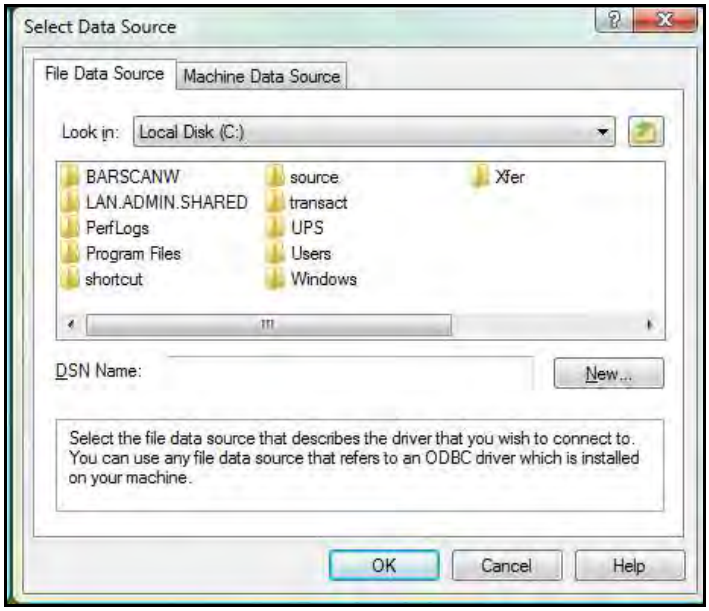
Importing a file structure avoids the task of having to manually add each field to the display screen. Instead, you will let Bar|Scan complete the screen for you. The import file must be an Excel, FoxPlus, or dBase III compatible file. These normally have the DOS file extension .DBF.

To Import a File Structure, select the Import Structure button, and you will see a Look up Window like the one below.

Select the folder which contains the file structure that you wish to use, and Bar|Scan will automatically import the list of the file structure for you.

You will need to tell Bar|Scan where the file that contains the structure is on your computer's disk drive.

Only those files with an extension matching the File Name are displayed. If your file is a compatible but has a different file extension, you will need to click on the *All Files* button. For example, if the File Format is ODBC, you may see the following screen instead of the one on the previous page.



To complete your selection, click on the highlighted file name to select it and then click on the < Select > to return to the Export File Structure tab.

After selecting the file to import the structure from, you will see the file structures are filled in automatically.

Deleting an Existing Field

To Delete an existing field, select the field that you wish to delete, and then click the delete button with your mouse. You can delete any field, as required.

With a structured file, deleting IS NOT required since Bar|Scan will know at what position in the record one field ends and the next field begins and fields that you do not wish to import will be ignored. There are a few non-structured files such as a delimited file where this is also true.

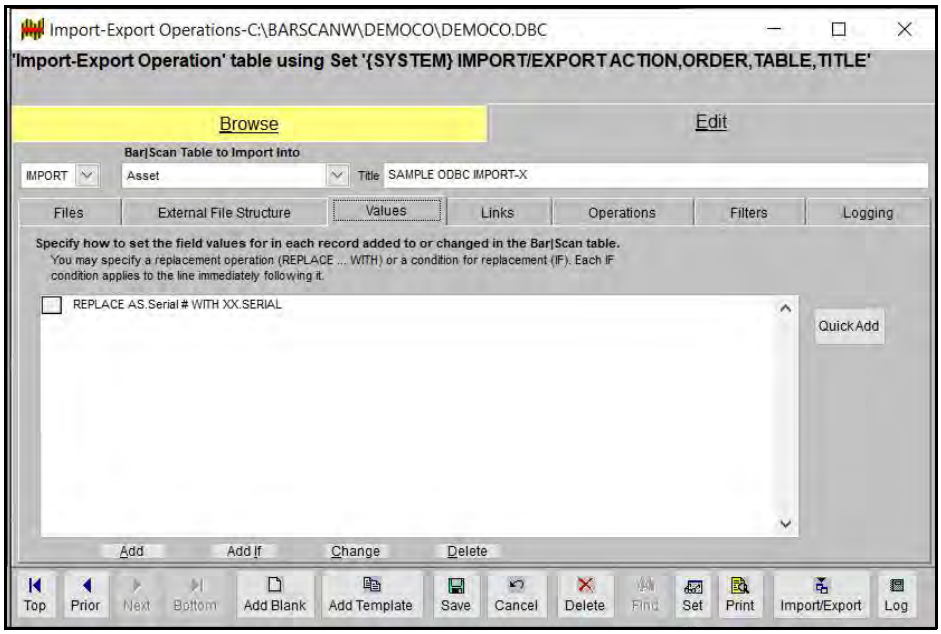
Check for Problems

When you select this button, Bar|Scan checks for logic problems on this tab. An internal table is built (what we refer to the XX table). If it can't create it properly then neither the export nor import can work. Doing this test can avoid some types of messages that would otherwise show up when the import/export was attempted.

For example, forcing a Date field to anything other than 8 characters long does not make sense since Bar|Scan stores dates in only this format.

The Values Tab

Select the next tab, the Values tab, and you will see a table like the one below.



You complete this screen to tell Bar|Scan which fields in Bar|Scan to replace with the information contained in the fields of the import File.

Even if you are adding new Assets, Catalogs, Locations, etc. you must complete this screen. No fields are automatically replaced.

You may also use the Change and Delete buttons to alter or omit any items that were previously entered into this table.

Use Quick Add button to check titles for Import field names to see if they match. If they do, it imports the information automatically.

Add If

You can also create individual *Field Filters* for each replacement. This allows even more flexibility that the *Record Filters* described in the previous section *Page Five of the Import Format Screen.*

How do Field Filters Work, and How is it different than a Record Filter? Field Filters will only reject the individual Bar|Scan field for update by the Import File while a Record Filter will reject the entire Bar|Scan record.

This means that using a Field Filter allows other information in the Bar|Scan record will be updated and only the field affect by the Field Filter will not be updated.

Here is an example, suppose you wish to update the Bar|Scan Secondary Numbers as well as the Purchase Cost (as described on Page 36). Suppose also that even if the purchase cost is not updated because it is less than $500.00, you wish to import the Secondary Number. Using a Field Filter will allow you to preform the import successfully.

This tab allows you to specify how to fill in the values of each field. For instance, you may want to specify that you do not want serial numbers imported if the serial number is not currently a blank, by using the Add If button. Or, you may want to use the Add If button, to specify an external filter, so that you will not import any information from any asset whose total cost is less than $200.00.

This tab is separated into two areas. To the left is the list of fields to replace and to the right are the actions. The mouse or TAB key will move from selection to selection.

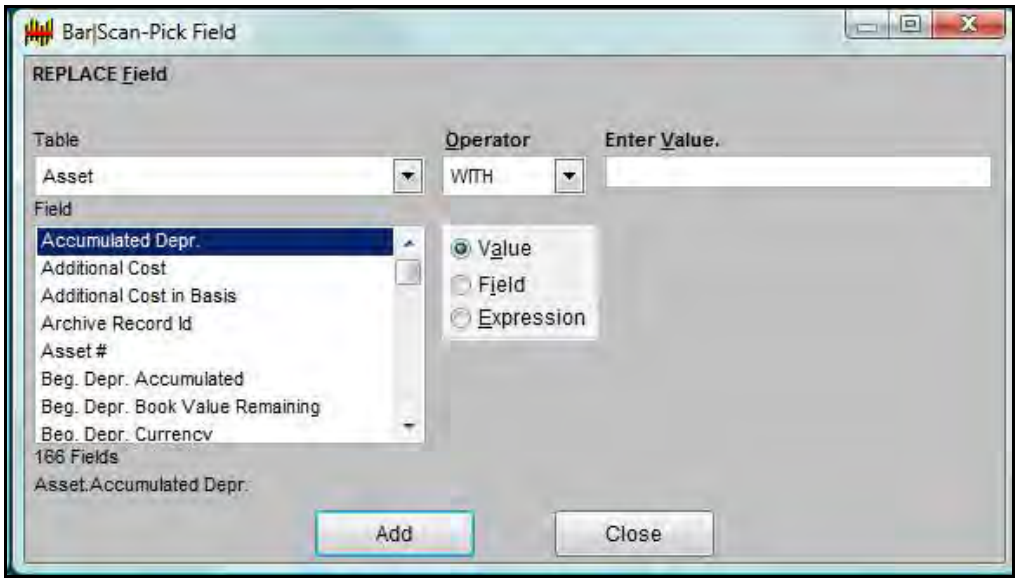
The left side of the display screen is either empty or displays one or more previously created fields to replace. You may use the arrow or TAB key to move

from field to field.

You may also change the order of the fields by dragging them up or down. This is done by placing it on the up-down arrow symbol at the left of the format file name and moving the mouse up or down while depressing the left mouse button.

Adding a Replace Bar|Scan Field

When you select the Add, Add If, or Change button from the Values tab, you will see a Look up Window like the one below.



Make your selection, and then select the Add button, and when you have finished creating all or the replace field filters, select the close button, and you will be returned to the Values tab.

Here are four more complex replacements shown to illustrate the flexibility of the replace feature. To import blank asset numbers and replace item with automatically generated 'Z' numbers, you would enter the following expression in the enter value section:

IF(EMPTY(XX.ASSET_NO), ZNUMNEXT(),XX.ASSET_NO)

Converting a six character text date such as “012495" to the date field can be done with the following expression:

X_CTOD(XX.INV_DATE,”MMDDYY”)

In general, converting text dates can be done by following the variations of the X_CTOD() Expression below:

Depending upon the field type of the field being converted:

XX = Work area of the imported data
YEAR = Raw field name of the field being imported (the field name in the external structure).
M = One digit of that portion of the string making up the Month number.
D = One digit of that portion of the string making up the Day number.
Y = One digit of that portion of the string making up the Year number.

For each of the MDY digits, use as many as needed to fully specify that portion of the date. For example, if only the year is provided in a field, specify the month and day with constants and use the field that specifies the year:

If the Year is numeric (type=N) WITH the century (e.g. 2016)
X_CTOD(“0101” + STR(XX.YEAR,4), “MMDDYYYY”)

If the Year is numeric (type=N) WITHOUT the century (e.g. 06)
X_CTOD(“0101” + STR(XX.YEAR,2), “MMDDYY”)

If the Year is a string (type=C) WITH the century (e.g. “2016”)
X_CTOD(“0101” + LEFT(XX.YEAR,4), “MMDDYYYY”)

If the Year is a string (type=C) WITHOUT the century (e.g. “06”)
X_CTOD(“0101” + LEFT(XX.YEAR,2), “MMDDYY”)

If there are embedded slashes
X_CTOD(“01/01/” + LEFT(XX.YEAR,2), “MM/DD/YY”)

To make Bar|Scan assign Catalog Numbers, Organization codes, etc. You can use

the following function. The function will look for the largest existing number and then generate a new, larger number for each item during the import. A sample that creates new Organization Codes is below:

TRANS(X_NEXTNO(“OW_ORG”,”ORG”),”@L 99999")

TRANS is the Transform function that turns the number into a character, X_NEXTNO is the actual Bar|Scan function, OW_ORG is the field name, ORG is the Table that contains the field name and @L 99999 is the mask that will produce the number, in this case a sequence like 00001, 00002, 00003.

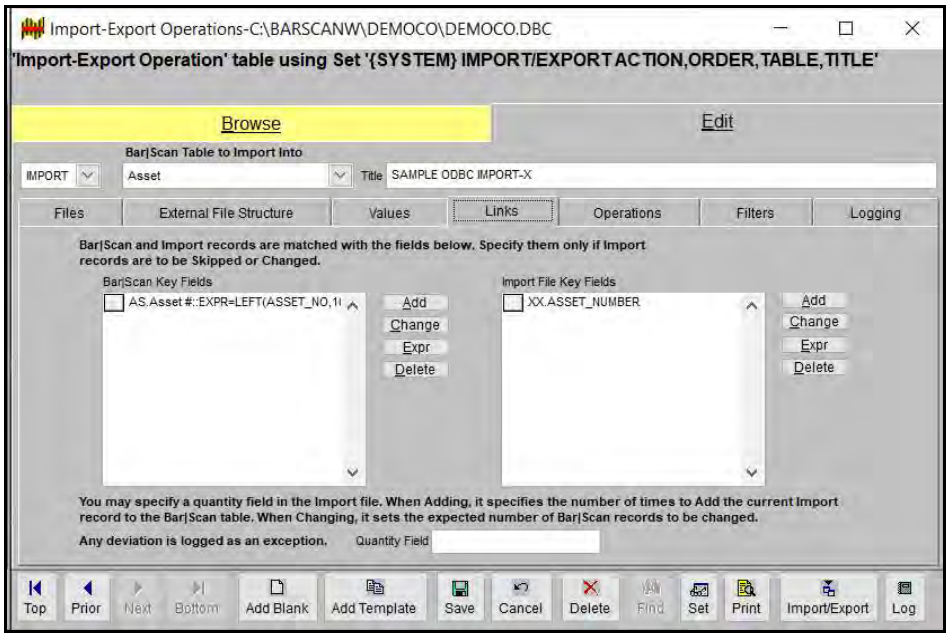
As you can see from our examples, you can create almost any type of filter you wish. However, this flexibility also means that you may need to know Bar|Scan field names but also some of our language conventions. Consult your Bar|Scan Dealer if you find that creating filters may be beyond your level of experience.

You have now completed all seven tabs that make up the Import Format. Press the Ctrl + S key combination, or click on the Save button in the tool bar to save your work.

In any case, we recommend that you do a back up of your Bar|Scan data if you are unsure of the results of your import. Refer to the section *Backing-Up And Restoring Bar|Scan Data* in *Chapter 3 - Installing Software* for more information.

The Links Tab

Select the next tab, the Links tab, and you will see a table like the one below.



You can complete this screen to tell Bar|Scan which file to import to as well as which *key* fields to use when trying to find a match.

What are *key* fields and why would I use them? First, key fields are special because they are the fields in both the import file and the Bar|Scan Table that contain the same information. Second, they are not required for all types of import. Each of these important issues will be explained on the following page.

Let us proceed with the mechanics of a *key* field and when it is necessary and when it is not necessary.

√ A key field is a field in both the import file and the Bar|Scan table. We assume that you have an understanding of the structure of the import file. All of Bar|Scan's table structures are documented at the end of this Chapter. You will need to match the fields based on the information in the fields. The field names do not need to be the same.

√ Key fields are required when you wish to change or add new information to existing asset, catalogs, etc. Unless you are doing a global change, Bar|Scan needs to know which assets to change.

√ Key fields are required when you are adding new assets, catalogs, etc. and you do not wish to inadvertently add duplicates of items already in Bar|Scan. Duplicates in your import file can also be eliminated by using key fields.

√ The case of the information is important. Lowercase must be identified when you import by use of the UPPER command, which is explained later.

√ The field type, i.e., character, numeric, or date, must also be the same in both files.

√ A key field is not required when you are adding new asset, locations, catalogs, etc. and you are sure that these items do not already exist in the Bar|Scan Tables. It is also not required for global changes which affect all items in a Table.

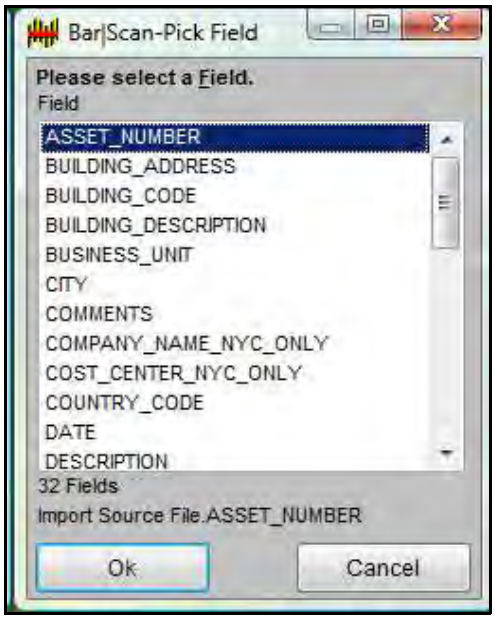
Selecting the Bar|Scan File Key Field

When you select the Add or Change button to add or change a Bar|Scan Key Fields item, you will see a Look up Window similar to the one below.

You are presented with the choice of Bar|Scan fields that you wish to use as keys.

Selecting the Import File Key Fields

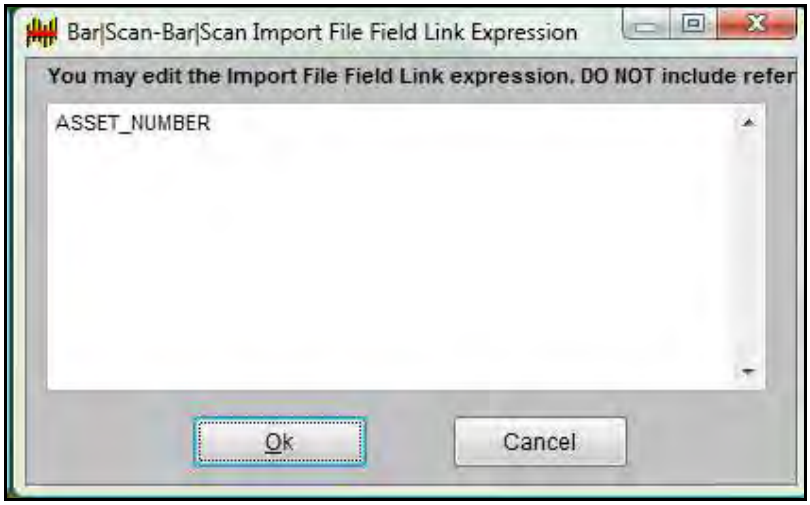
When you wish to select the Import File Key Fields, simply select the Add button, or select a key field already listed, and then select the Change button, and you will be shown a list of files like the one below.



You may select up to four key fields to match records in the import file and Bar|Scan table.

The match is successful when each of the completed keys are matched. For example, if you wish to update the Bar|Scan Catalog Table based on Manufacturer **and** Manufacturer's Part Number, the update will only occur if **both** matches are successful. It will not update the Catalog Table only if one of the two is matched.

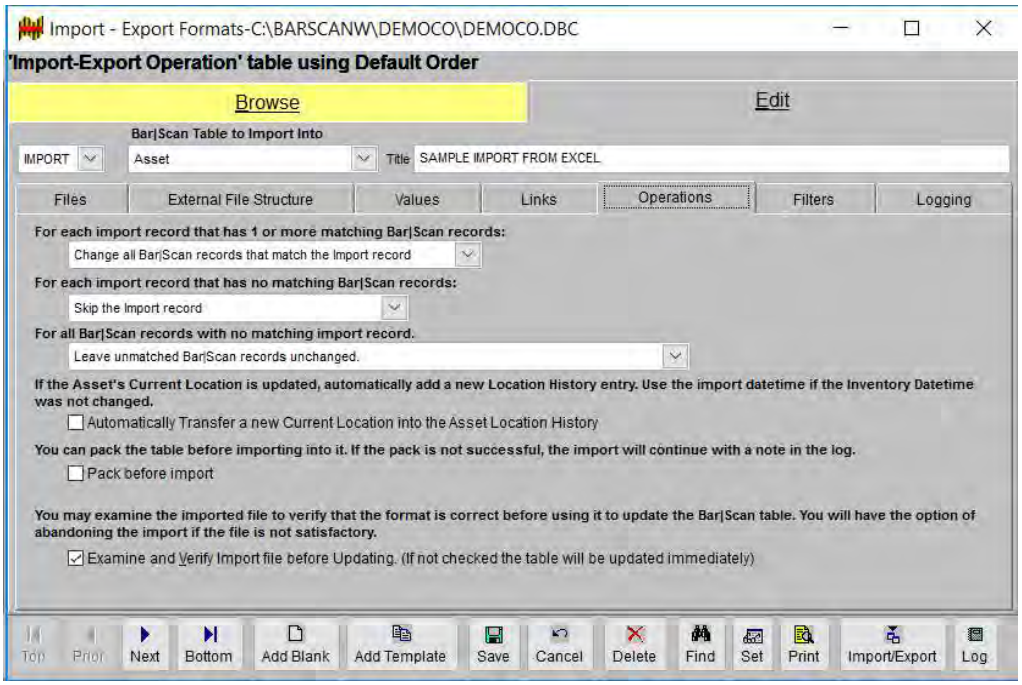
If necessary, you can use the Expression Button to create a custom link. For example, if your external data contains an asset number of 9 digits, but only the first 6 digits were in the barcode, you could build an expression like the one below that would truncate the number.



There are many reasons to use expressions when Bar|Scan and the external data source do not have a close match. It is best to contact your Bar|Scan Dealer for more information in order to build an accurate expression.

The Operations Tab

Select the next tab, the Operations tab, and you will see a table like the one below.



You complete this screen to tell Bar|Scan what you would like to do when it finds a match and when it does not find a match. In addition, you have the opportunity to review the import file format after it has been converted to a Bar|Scan data file, but prior to actually being imported.

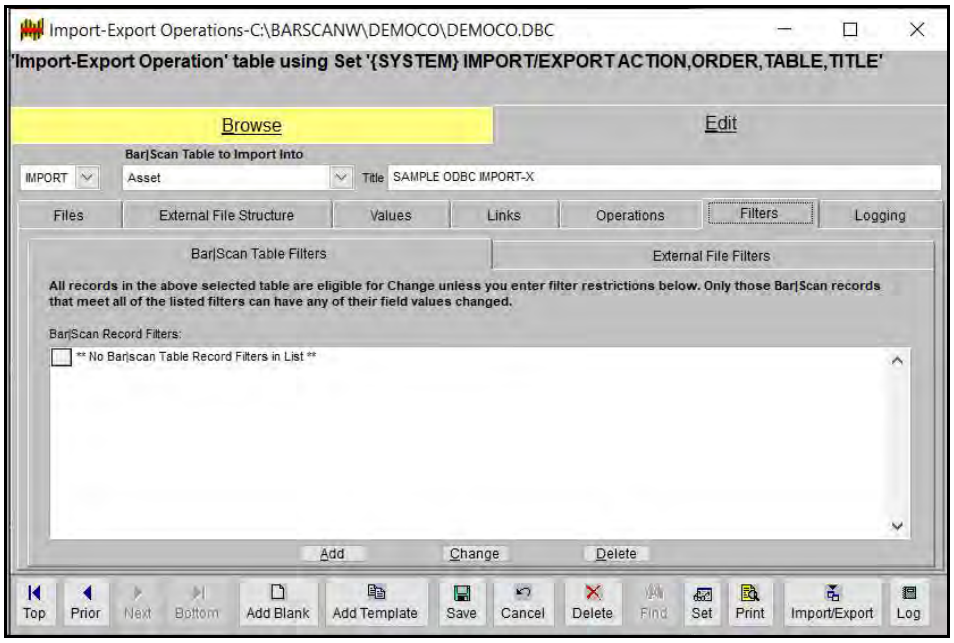
The items are in the form of pull downs. You can make your selections by clicking your mouse on the down arrow, TAB or RETURN key to move from item to item.

You become familiar with how the import process works, it is recommended that you select *Examine and Verify Import File before Updating.*

Since the Bar|Scan Asset Table maintains the current location information and the Bar|Scan Location History Table maintains the asset history, when a new asset is added, it must be added to both Tables. By check marking "automatically Transfer a new Current Location into the Asset Location History", the import will transfer location history as required. This makes it easier to import Assets.

The Filters Tab

Select the next tab, the Filters tab, and you will see a table like the one below.



You complete this screen to tell Bar|Scan what existing items in the Bar|Scan tables or the Import File can affect the import. For example, you may wish to import asset purchase cost information for only those items that Bar|Scan shows as Capital Assets but not those that Bar|Scan shows as Expenses. But our import file contains costs for all items, both Capital and Expenses.

How is this done? Assume that Bar|Scan's general ledger field contains G/L codes which represent both Capital and Expenses items. Assume also that all Capital Assets have a general ledger number that begins with "C" and that all Expended items do not. You can now create a filter stating that items in Bar|Scan whose general ledger number does not begin with "C" will be ignored and no update will take place.

As you can see from the previous example, filters can be based on any field in Bar|Scan, not just the fields that you are importing.

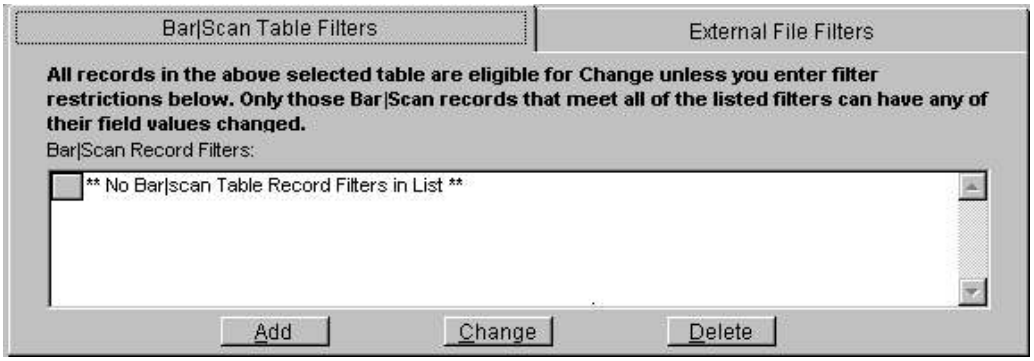
You can also filter on items in the Import File. For example, your import file contains purchase costs for all items but you wish to import asset purchase costs only if the purchase cost is greater than $500.00. Assume that there is no purchase cost information already in Bar|Scan, you must filter by the purchase cost in the Import File.

Looking at the display screen, the screen is separated into two areas. To the left is the list of Bar|Scan record filters and to the right are the actions. The mouse or TAB key will move from selection to selection.

Double click on your mouse, or press ENTER to pick a selection.

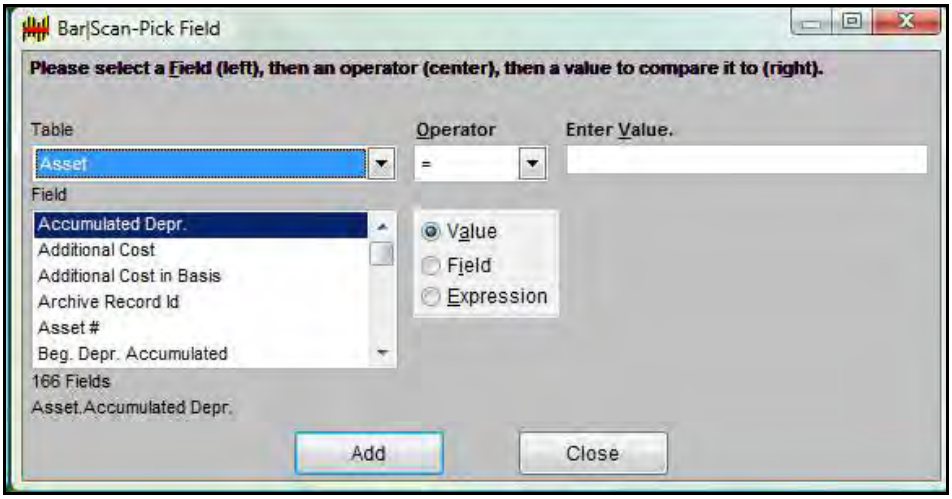
The left side of the display screen is either empty or displays one or more previously created filters. There are an infinite number of fields that can be created. You may use the arrow or TAB key to move from field to field.

The Filter tab has two tabs of its own. The first tab, Bar|Scan Table Filters looks like the one below.

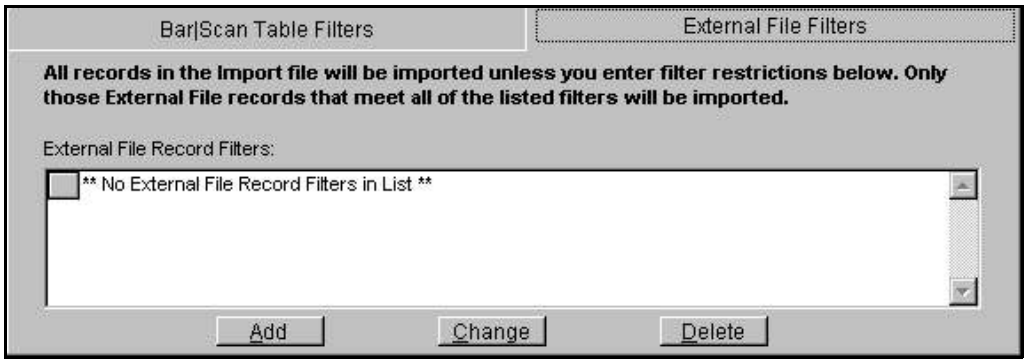


This tab will allow you to put filters on the import, so that only those Bar|Scan fields that match the filters listed can have their values changed during the import.

When you select the Add button, or select a previously created filter, and select the Change button, you will see a table like the one below.

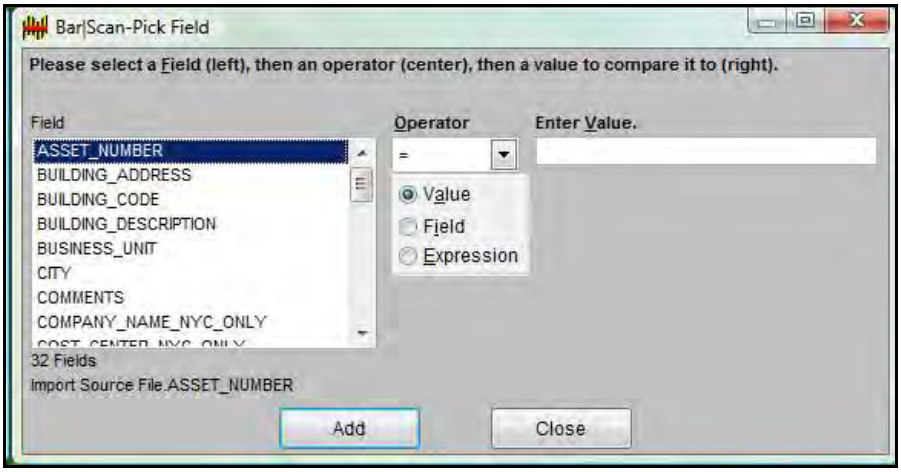


The second tab, External File Filters, looks like the one below.



This tab allows you to place a filter on the data that you are going to import, so that only the records that meet the filter will be imported.

When you select the Add button, or select a previously created filter, and select the Change button, you will see a table like the one below.



Assuming we select Bar|Scan's General Ledger Number, as mentioned in the example.

We now complete the line by typing the rest of the filter. The filter line now looks like this:

AS.GeneralLedger#='C'

This is the Bar|Scan field name for the General Ledger Number. The AS. in front of the field name is called the *file alias*. The file alias' as well as field names are listed at the end of this Chapter.

We have now completed a filter. All assets whose General Ledger Numbers begin with the letter "C" will not be affected by the import.

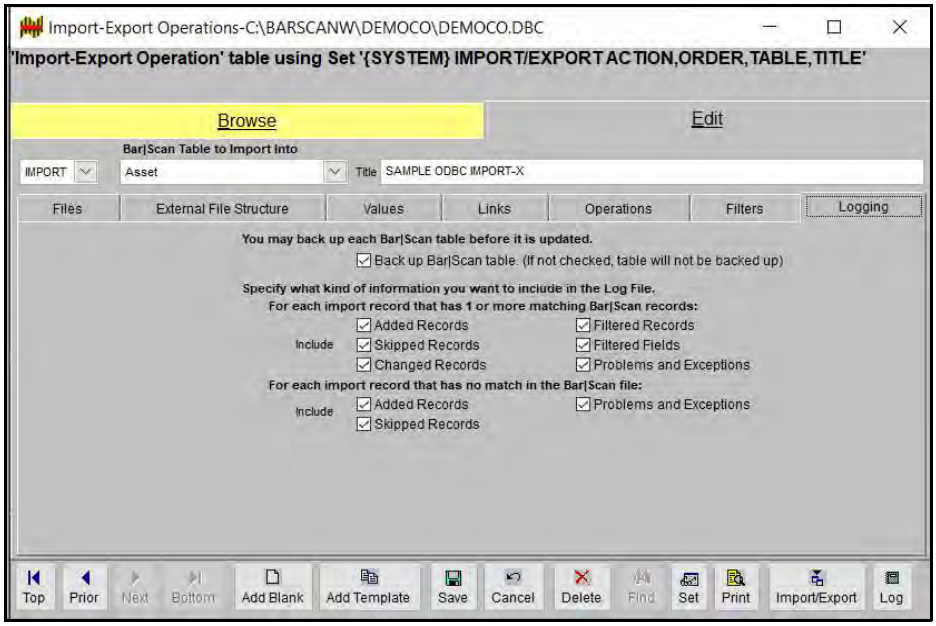
As you can see from our simple example, you can create almost any type of filter you wish. However, this flexibility also means that you may need to know Bar|Scan field names but also some Microsoft language conventions. Consult your Bar|Scan Dealer if you find that creating filters may be beyond your level of experience.

Hint: Additional information is available on our Support Knowledge Base page on our website at www.barscan.com

When you select the fields that will complete the filter, select the Add button. When you have finished creating all of the necessary filters for this import, select the Close button. You will be returned to the Filters tab.

The Logging Tab

Select the fifth tab, the Logging tab, and you will see a table like the one below.



Looking at the display screen, the screen is separated into two areas. At the top is the option to backup the Bar|Scan Table before you perform the import. At the bottom are the options for the Import Log File.

You complete this screen to tell Bar|Scan if you wish to backup the Bar|Scan file and what information you wish to record in the optional *Import Log File.*

The mouse or TAB key will move from selection to selection.

Double click on your mouse, or press ENTER to pick a selection.

Back Up Prior to Import

Bar|Scan will create a back up copy every time you perform the import using the Import Format created in this section. The backup will be located in the your *companyname\backup* folder.

When you import onto a BarScan Table, two new files are created in the form:

BXfilename YYYY-MM-DDTHH_MM_SS.DBF
BXfilename YYYY-MM-DDTHH_MM_SS.DBF

Where filename is the original BarScan Table Name, YYYY-MM-YY indicates the date and where HH_MM_SS indicates the time of the archive.

If you have preformed the import before, and are confident that the import will be successful, you may wish to not back up the Bar|Scan Table since it does require additional time and disk space.

Import Log File

The Import Log File will record information on what events occurred when you performed the import.

After you perform the import, by pressing the Log Button, you can review the Import Log File which will contain the results of the import based the buttons selected on this Display Screen. After opening, you can instruct that the file be written to your computer's drive for backup by selecting Fil-> Save As. The file is an ASCII text file and can be opened by many different text editors, word processors or readers.

Since you control what information will be recorded, the import Log File can be either a very large file containing very detailed information, or a small file containing a minimal amount of information.

If all selections are set to (N)o, the Import Log File will contain only header information documenting the file updated and when it occurred.

By default, only the prompt's Problems and Exceptions for matches and no matches are recorded.

Executing the Import

When you have completed your Import Format File, you are ready to execute the import instructions contained within it.

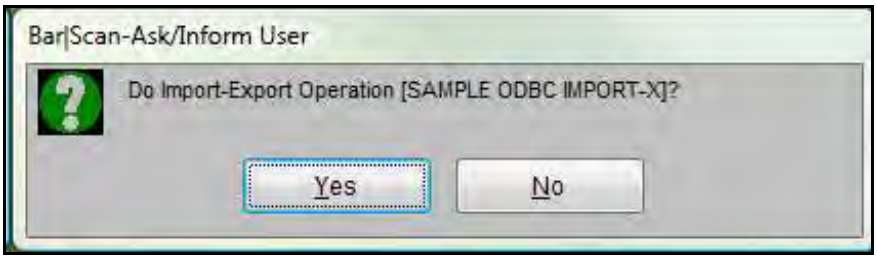
Notice in the close up of the tool bar shown below, there are two new buttons on the right.

The second to last button is used to start the actual Import/Export. When the cursor is placed over this button, it will say, Import/Export using ranged items. If none are ranged, then use all items in the current SET command.

The last button is used to View, Edit and Print the Import/Export Log file.

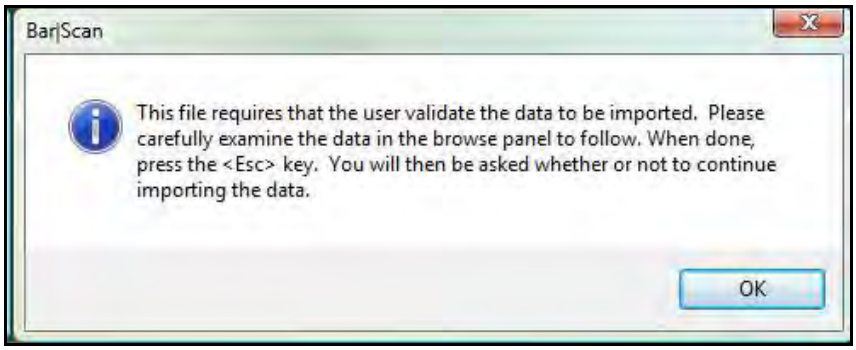
The Simply select the Format File that you want to export, and then select Import/Export icon on the tool bar.

You are asked if you want to go ahead and do the import.

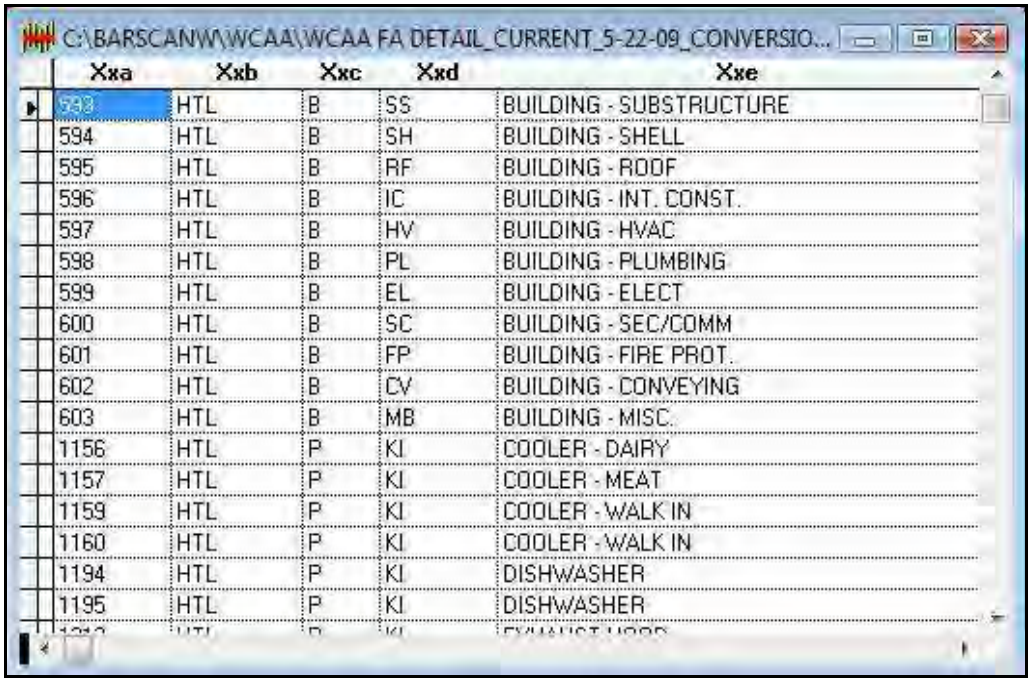


If you answer **NO**, you will be returned to the Import/Export Format File Menu.

The information that you wish to import can optionally be visually validated, if you instructed Bar|Scan to do so. You will then be presented with the following dialog box.



You will now be presented with the import file as seen by Bar|Scan. A sample is shown below.



Xxa	Xxb	Xxc	Xxd	Xxe
593	HTL	B	SS	BUILDING - SUBSTRUCTURE
594	HTL	B	SH	BUILDING - SHELL
595	HTL	B	RF	BUILDING - ROOF
596	HTL	B	IC	BUILDING - INT. CONST.
597	HTL	B	HV	BUILDING - HVAC
598	HTL	B	PL	BUILDING - PLUMBING
599	HTL	B	EL	BUILDING - ELECT
600	HTL	B	SC	BUILDING - SEC/COMM
601	HTL	B	FP	BUILDING - FIRE PROT.
602	HTL	B	CV	BUILDING - CONVEYING
603	HTL	B	MB	BUILDING - MISC.
1156	HTL	P	KI	COOLER - DAIRY
1157	HTL	P	KI	COOLER - MEAT
1159	HTL	P	KI	COOLER - WALK IN
1160	HTL	P	KI	COOLER - WALK IN
1194	HTL	P	KI	DISHWASHER
1195	HTL	P	KI	DISHWASHER

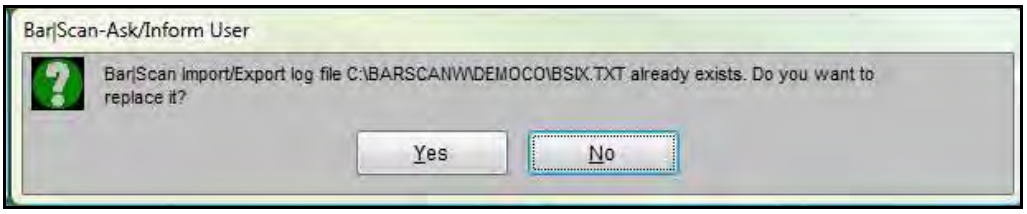
If the information presented to you appears erroneous or incorrectly structured, you will be presented with an opportunity to abandon the import.

The Import/Export Log File records the events that occurred during the import. You control which events were written to this file when you created the import Format file. The report can be viewed on the screen as well as printed to your printer. The following is a sample view.

The Import/Export Log file can become very large if you instructed it to record all events.

Each Import will create a new Log file and the previous file is overwritten, however you are warned when the old Log file will be replaced.

The dialog box will look like this.



Usually you will select **YES.**

The final Import Dialog Box informs you that the Import was completed.

You will be presented with the following dialog box.

The Import Operation is completed. It is always a good idea to review the Asset tables after the import operation has been completed.

Also consider printing the results of the import by clicking on the Import/Export Log File button.

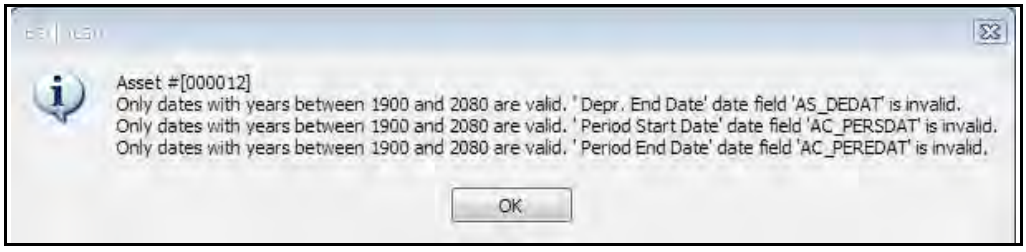
Import problems

There can be many reasons why an import is not successful. Some are related to the data itself, others related to the import rules Bar|Scan follows.

Based on the severity of the problems, Bar|Scan will decide if the items being imported can be edited after the import, which will then complete the import, or of the import is rejected in it's entirely.

For example, on your Company Settings Screen, you determine the Range of Valid Years that you want Bar|Scan to work within. By default this is 1920 through 2080. Bar|Scan will reject any import (or data entry) of any dates that fall outside of this range.

When attempting an import with invalid dates, you will be presented with the following dialog box.

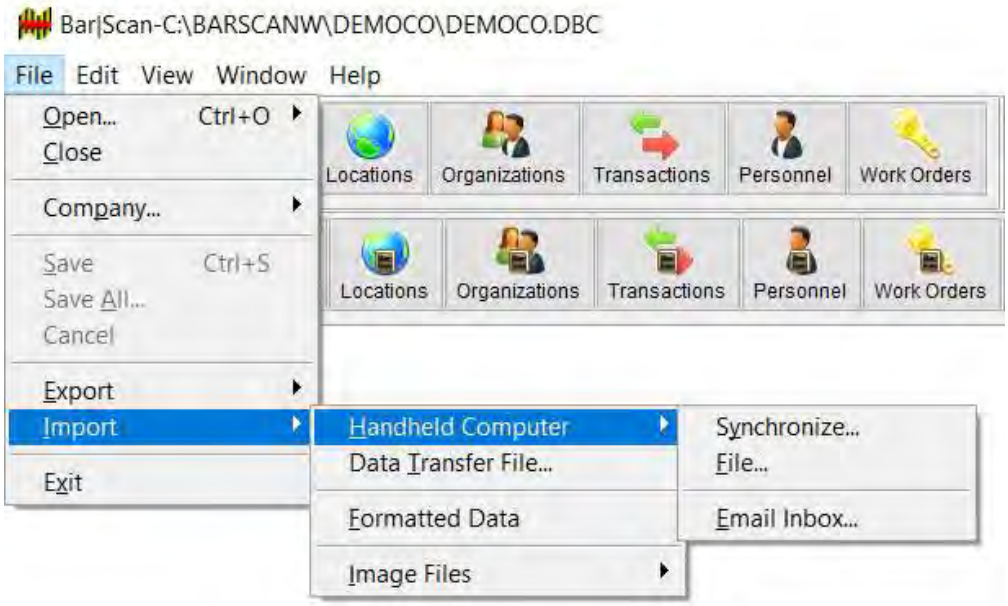


In the above example, this is most likely caused by the data in the spreadsheet. Using Excel, sort the date column. Next look at the earliest and latest date. You might find a year such as 3019 Instead of 2019.

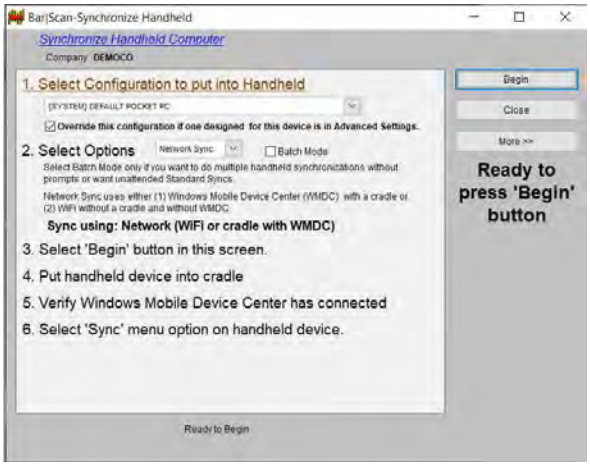
Because the file you are importing is not tested for validation until the import begins, the import problems are usually presented at the very last stage of the attempted import.

IMPORTING FROM A MOBILE DEVICE DATA FILE OR EMAIL

There are three ways to select the upload feature for a Handheld Computer. The first is to go to the Main Menu then select File . . .▸, Open . . .▸, Handheld Computer. . .▸, Synchronize or File or Email inbox as shown below.



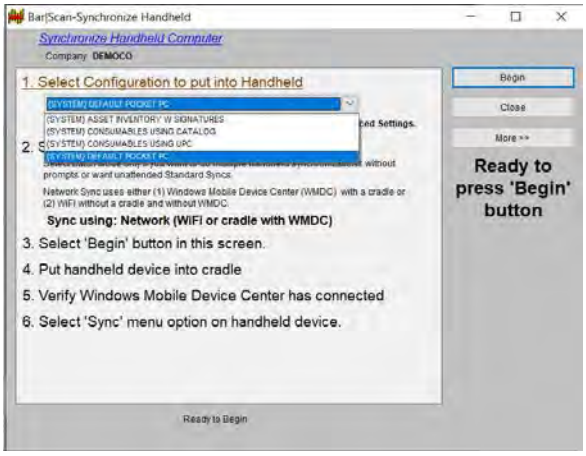
When you select Synch Handheld, you will see one of the following types of dialog boxes.



The dialog box above is for Mobile devices running Windows Mobile or Windows CE. There are Legacy configurations in Bar|Scan that can also be used for for serial connections such as those used by legacy Handheld Computer models SPT, PDT, etc.

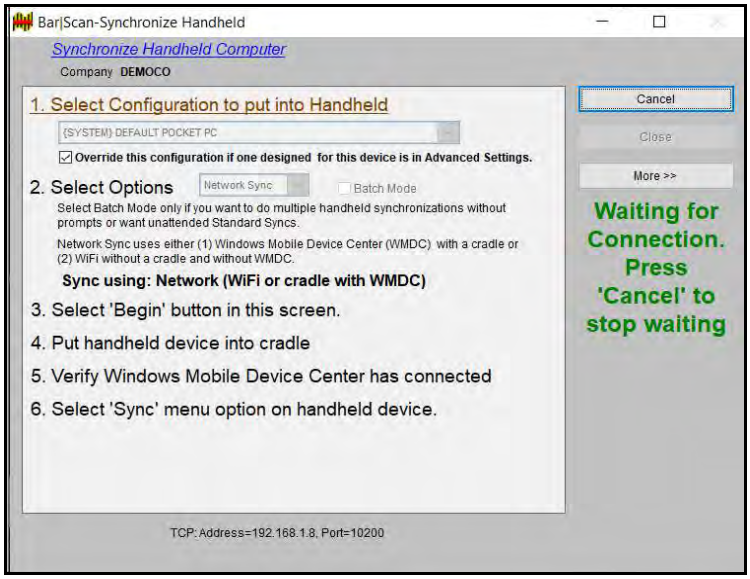
On this box you should select the type of connection that you are going to be using by using the down arrow next to the Use Configuration field.

If the selection shown is not the correct selection, simply click on the down arrow next to the field that contains the connection, and you will see a drop down menu list, as shown below.



When you have determined the correct connection, simply select the Begin button. The IP address should be selected, automatically.

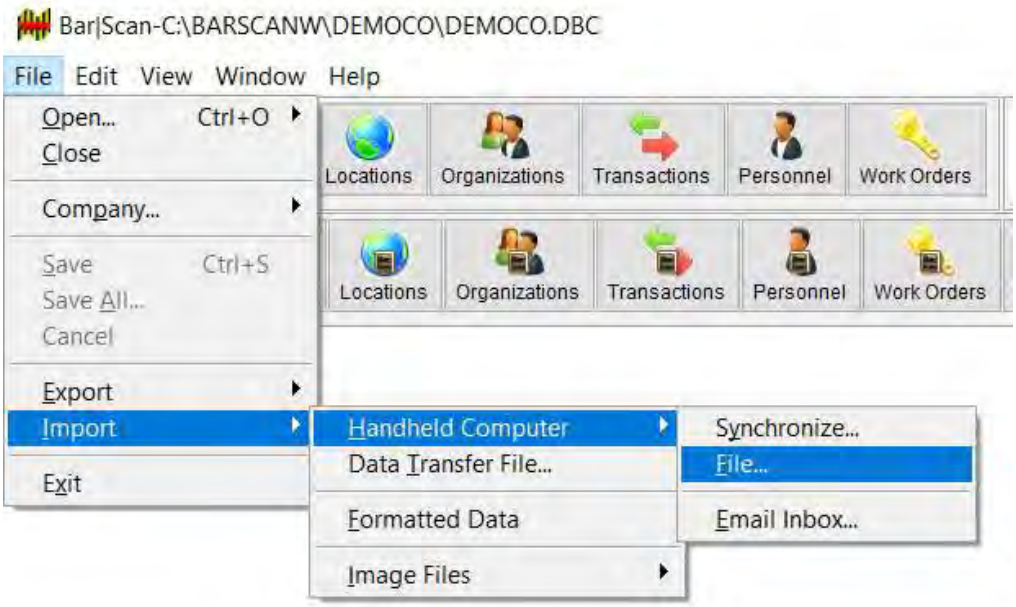
The message of the display panel will change to say initializing, then to “Waiting for Connection” as you can see below.



If the Handheld Computer is connected correctly to the computer, and you begin the Tools -> Synch function on it, the bottom of the above box should change again to display how many bytes have been received. The box will display a Cancel button for you to cancel the synch if you deem necessary.

When the synch is complete, Bar|Scan will inform you that the items have been placed into the Transaction table. You have now completed the synchronization process.

When you want to import a Handheld Computer file, go to the Main Menu, then select File . . .▸, Import . . .▸, Handheld Computer. . .▸, File, as shown below.



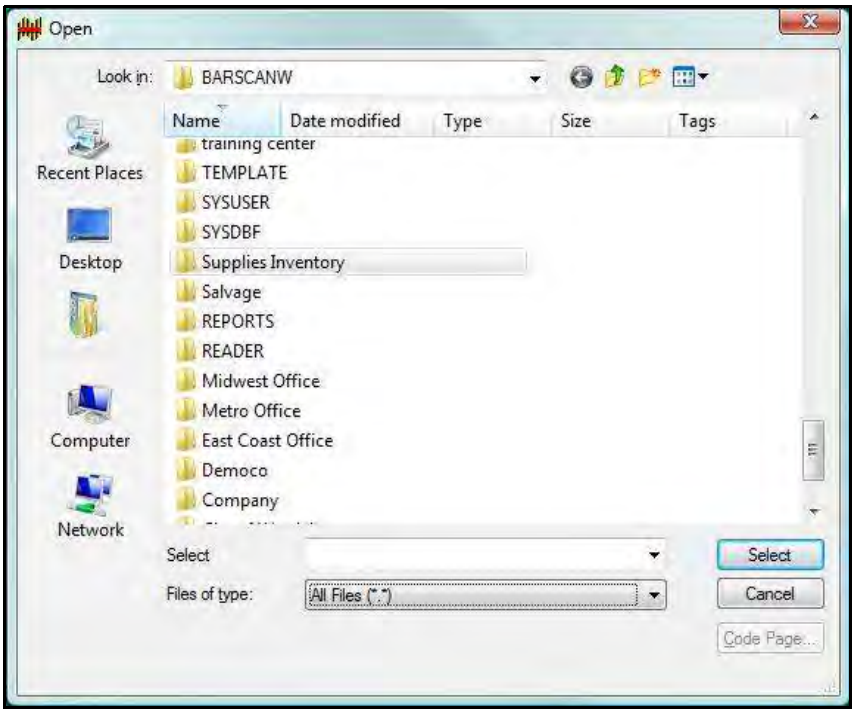
You can now browse to your Company's Reader folder (barscanw\your company name\reader) and import any previously synchronized Mobile Device File. Usually, you can determine which file you wish to import based on the file's time and date stamp.

On Handhelds prior to the MC3200 model, you can also browse directly to the Handheld's SD card if the handheld is connected. However, call your Bar|Scan Dealer for technical support prior to attempting any imports this way.

The default format for Pocket PC is XML, so these files can also be accessed with an editor.

As previously discussed in this Chapter, Bar|Scan cannot only get transactions from a Handheld Computer, it can also get transactions from a file which *looks* like a Handheld Computer or a file that was previously uploaded but not put in the Transaction table. The required file structure for both TAG and TAKE mode is documented at the end of this chapter.

When you have selected to import a file, you will see a Look up Window like the one below.

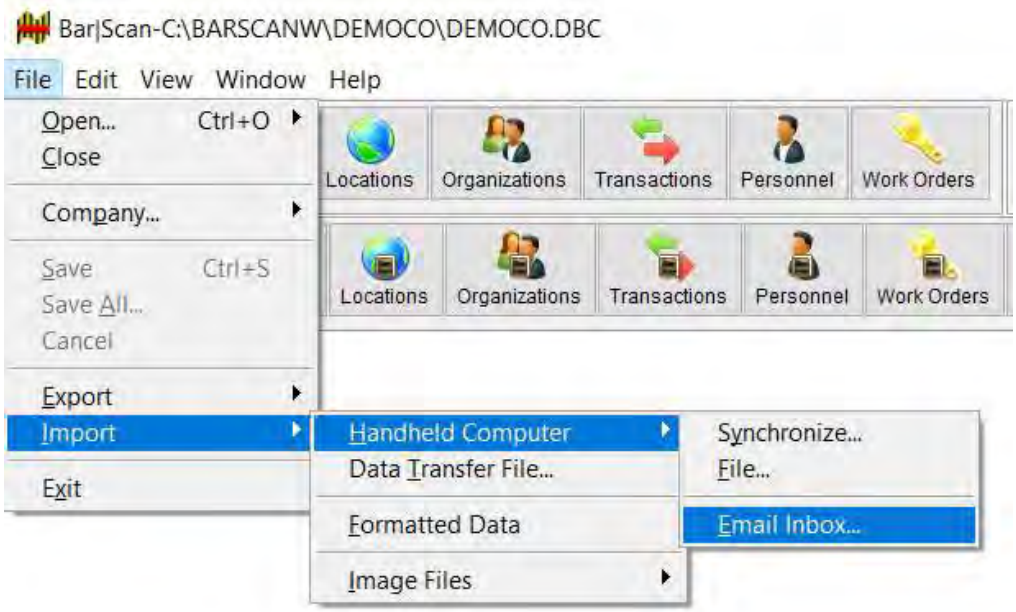


You will need to tell Bar|Scan where the file that contains the transactions is on your computer's disk drive. Select the proper drive, and folder that contains the file.

To complete your selection, click on the highlighted file name to select it and then click on the Import button.

Bar|Scan will evaluate the file format to determine if it really matches the Mobiel Device format as required. See the Mobiel Device TAG and TAKE formats at the end of this Chapter for more information.

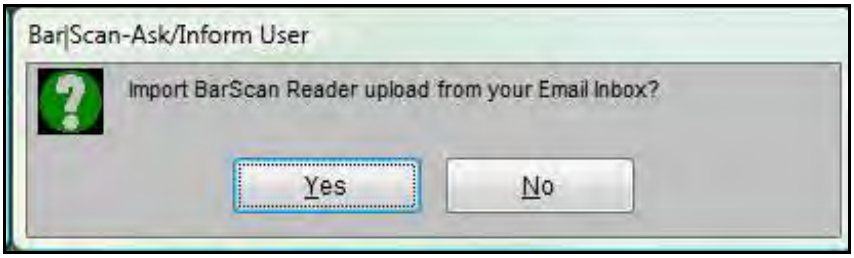
When you want to import a Mobiel Device file, go to the Main Menu, then select File . . .▸, Import . . .▸, Handheld Computer. . .▸, Email Inbox, as shown below.



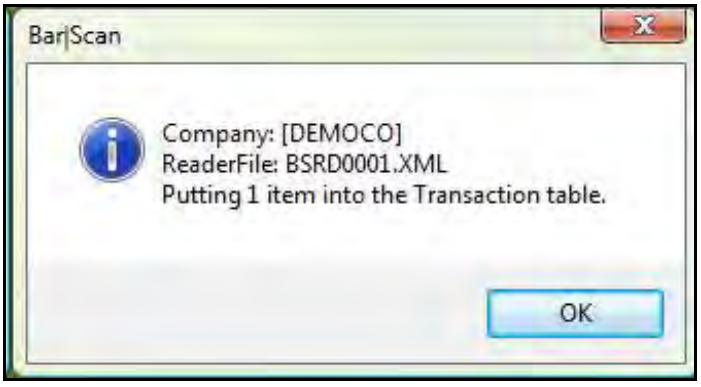
If you have configured your compatible Mobiel Device to synchronize using email accounts and have collected and sent inventory information to your account, you will have one or more emails waiting for Bar|Scan in your Outlook inbox.

Note: Outlook does not need to be open to perform the import.

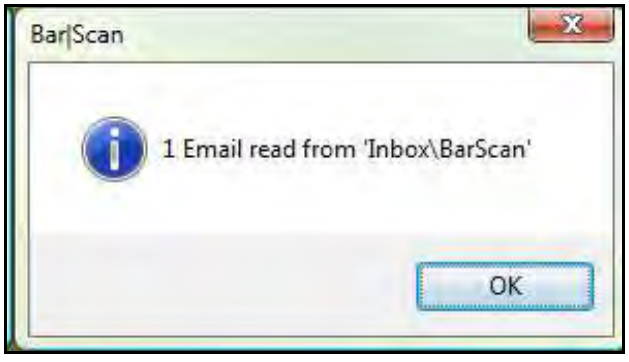
When you select Email inbox, you will be presented with the following message.



Reply Yes to allow Bar|Scan to check your Email Inbox. If inventory information is successfully imported, you will be presented with the following message:



When all of your emails have been completed, you will be presented with a message similar to the following:



If no emails are waiting, you will see a message similar to the one below.

THE ACTIVITY LOGS

INTRODUCTION

There are many ways to use the Activity Log Export Feature. It can serve as an additional audit trail of your work. It can be used to create detailed Asset Reports which take changes to the data over time into effect. It can even be used to track employee mistakes, since it records any changes including asset deletions made in error. It can also be used as a tool to interface with other software applications.

For example, lets say that you want to use the Activity Log Export feature to inform your enterprise asset depreciation application when a new asset has been acquired, moved to a new location or cost center, or retired. You may wish to consult with your accounting department regarding proper procedures in handling these issues.

You and your accounting department will want to establish guidelines concerning the creation of the Activity Log Export file before you start using this feature. We recommend that you thoroughly review this entire chapter before setting up your procedures.

An important feature of the Activity Log Export feature is that it records and keeps a history of changes to your assets, either from the Mobiel Device or keyboard entry or an import. Once the Activity Log is set up, this collection is done without the need of any action on your part. This is what is referred to as *event driven* processing.

Both the Activity Log and the Bar|Scan Report feature can be used to create an export file, in one of many different formats, to other systems, but the Activity Log is *event driven* while the Bar|Scan Report feature is not.

The Activity Log feature can easily be set to record only those events or actions that are of interest to your other system. The Log, however, always exports the information in the same, uniform manner that you specify. In other words, the *export file* is always in the same format no matter what *events* were recorded. This uniformity is so that your other system can rely on the format for import even if you wish to export certain information today and different information in the future. It also means less computer programming to create a bridge between unlike platforms and applications..

You may wish to consult with your IT Department to determine the exact method of interface to your other system, both hardware and software. Most fixed asset depreciation systems have the software in place to *import* file information such as the Bar|Scan Activity Log Export file. However, some computer programming may be required.

You can select which Table you wish to Log. The Activity Log will record *all* fields in the Table that is being Logged for export.

INFORMATION RECORDED

The Bar|Scan Activity Logs will not begin recording *events* until you instruct it to do so. Recording events is done by using the LOG and the FIELDS Operating Modes which are discussed later.

There is an Activity Log file for each major table in your system, i.e., Asset, Catalog, Location, etc. Each Log file must be individually set up to record information for it’s corresponding table.

As previously mentioned, the Activity Logs can track additions, changes and deletions, behind the scenes, for export to and import from your personal computer or main frame based fixed asset accounting system. You can control what types of actions (add, delete or change) and which fields will trigger an entry in the Activity Log.

You can use the Bar|Scan Report Generator or the Import/Export Module to print or export the Activity Log. The Activity Log can be generated as frequently as desired.

As you have seen in *Chapter 10 - Reports* as well as this Chapter, the output is a flexible listing of the asset record, in a variety of formats, with optional control field to identify fields changed within the record, the type of action, and a time and date stamp. Format options include: Delimited, ASCII, CSV, PDF, Microsoft Excel, and System Data Format (Fixed fields).

For example, the information being saved in the Activity Log consists of the entire Asset file plus 5 extra Activity log fields. One field contains the bar code asset number prior to a change in the asset number, two fields hold a time and date stamp for the recorded Activity. A fourth field holds what type of Activity generated the Activity log record, and the last field contains a list of which asset items were changed. You select which of these fields you wish to export at the time the export file is generated.

Depending on the amount of use, it may be possible to generate a large number of Activities very quickly. For example, adding a General Ledger number to 100 assets will generate 100 new Activities. Care should be taken to avoid specifying the logging of unnecessary fields as this may produce more Activities than wanted.

Selecting the proper fields to record as Activity events will be your responsibility and should be considered part of the overall set of asset management procedures implemented as part of the Bar|Scan System.

As discussed, in Chapter 13 - Housekeeping, you can Archive the Activity Log. This is a housekeeping function that does not need to be performed very often.

TRANSFER TO ANOTHER APPLICATION

Actual transfer of the Activity Log Export file information to your other software application is not actually done from within Bar|Scan. It should however, be done as soon as possible after Bar|Scan generates the Export file.

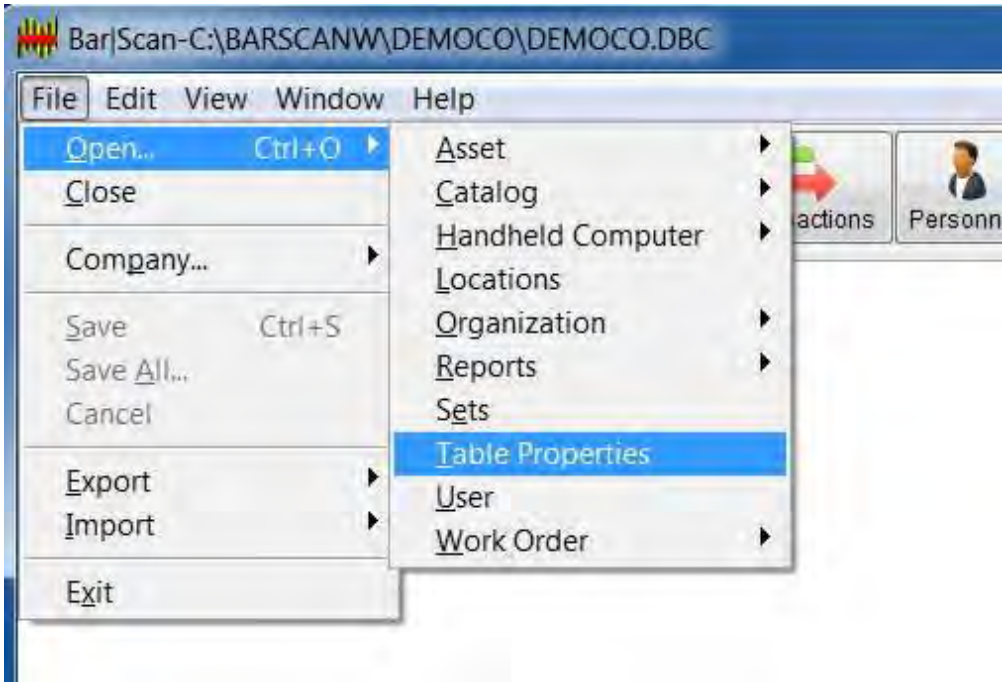
The transfer can be done anytime, e.g., weekly, monthly, quarterly, etc. and will probably be dependent on the exact procedures you and your accounting department develop.

We recommend a weekly transfer when hundreds of Activities are taking place on a weekly basis.

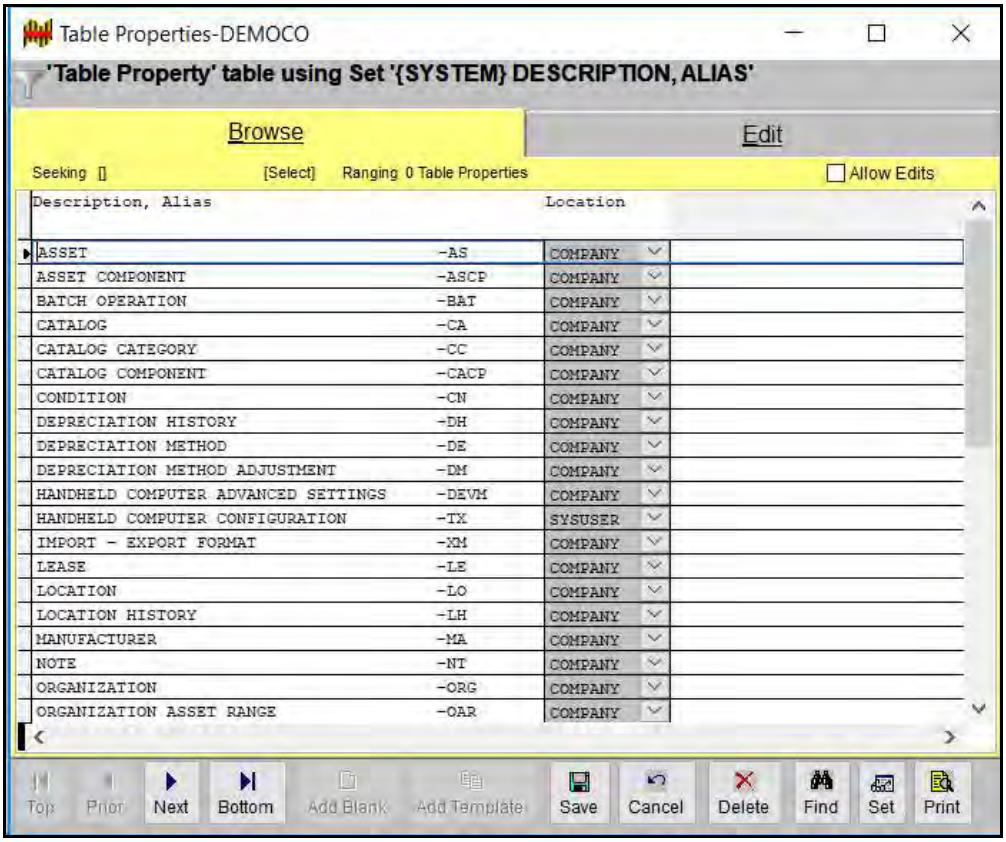
While there is no way to calculate the exact size of the Log Export file, you can experiment to see what size of a file your combination of *event* triggers will generate.

DEFINING AN ACTIVITY LOG ENTRY

When you want to select which activities to log, you will need to open the Bar|Scan File Lists. To do this, go to the Main Menu, select File . . .▸, Open . . .▸, Table Properties, as shown below.



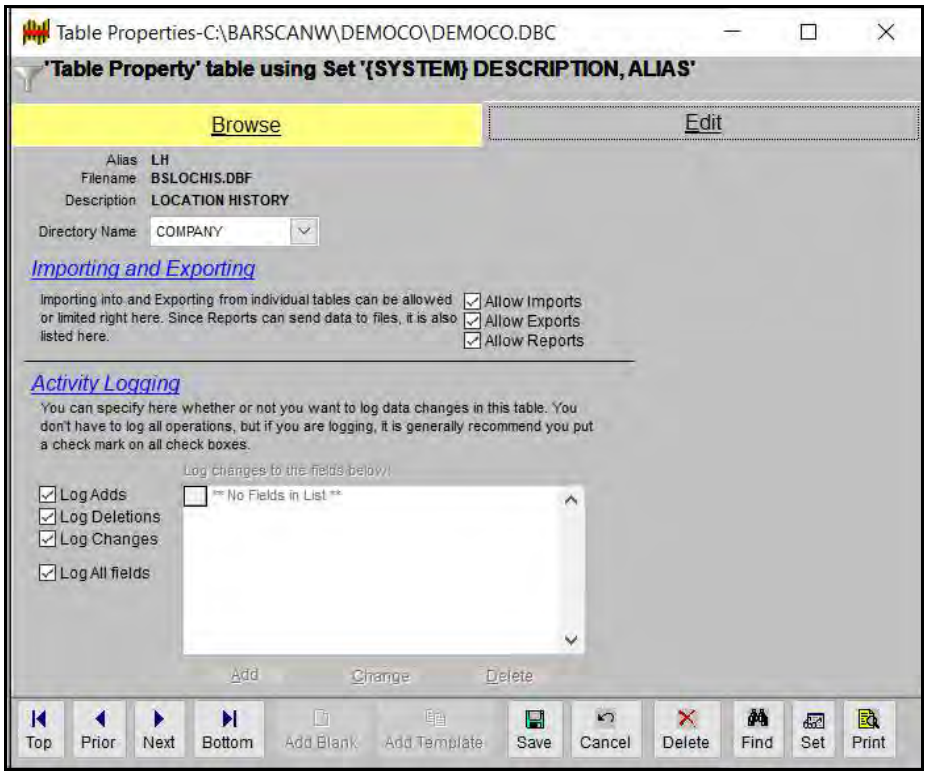
When you do this, you will see the following table.



This panel shows you a list of all of the tables that can be selected to log. It permits you to define which items will trigger an *event.*

Select one of these items listed on the Browse panel, and then select the Edit tab.

You will be shown a panel similar to the following.



This panel allows you to access a list of fields to log for each company. You may choose to Add, Change, or Delete fields to log. As shown you may also choose whether or not to allow imports, exports, and reports of the items logged.

The Bar|Scan Activity Log allows the generation of a continuous series of Activity records based on the occurrence of a limited number of user specified *events* for each table. These *events* are: the addition of a record to the table, the changing information in a record, or deletion of a record from the table.

You can control which of the above events will generate a record in the Activity Log. Additions and Deletions will automatically generate an Activity record if you specify these as *events* that you wish to Log.

As mentioned before, in addition to keyboard entry, imports and uploads from the Mobiel Device via the Bar|Scan Transaction Table will also generate an Activity record.

There are several special fields in the every table in Bar|Scan including the Log Tables that can be used to query about what type of change took place to the record. They are: Log Add-Edit-Delete, Log Event Code, Log Date, Log Time, and Log User.

There are 3 possible entries into the Log Add-Edit-Delete Field. They are:

"A" - Addition of a new record
"E" - Edit of an existing record
"D" - Deletion of a record

The "A" and "D" codes can only be created once for each record while the "E" code can be created multiple times.

Keep in mind that the "D" code refers to deletes in the Table being Logged. Normal activity does not delete records in the Log Table.

You can create simple filters on the reports or exports from any Activity Log Table. For example the filter "Log Add-Edit-Delete = 'A'" would print only the new additions to the Log Table. The addition of the Log Date can be used to narrow the data to only Adds that meet the Date Filter.

The Most important field is called the Log Event Code and it is one character long. Your other computer application may use this code to assist in processing the import. You may also wish to use the Log Event Code in combination with the Log-Add-Edit-Delete field to obtain a more detailed picture of Logging.

In summary, Logged events occur when a record has been added, changed or deleted and they will have an event code due to one or more of the following events:

"S" - User has selected a company. This will occur when logging in and when the user manually selects a new company from the company list. This entry is in the

Bsuser Table.

"E" - User has performed a manual edit upon the record or a change was made to the record. Note: Adds and deletes in supporting tables are marked as an edit in the master record if such affects the master. This is the default entry unless another entry used.

"D" - Record deleted.

"M" - Record modified, added or deleted during a Transaction Move.

"W" - Record modified, added or deleted during a forced change in inventory from a Work Order Shopping form line item.

"V" - Record was modified or added during a transaction validation.

"P" - Record marked as printed.

"T" - One of the housekeeping table integrity functions has made an adjustment to this record, eg, duplicate date/time fix., realign z number locations, renumber duplicate z numbers. Note: Not all housekeeping functions will have this entry.

"R" - Entry generated as a result of a Work Order Reorder operation.

"Y" - Record modified, added or deleted due to a company synchronization.

"I" - Record present due to an import operation.

"L" - Present only in Asset location history records. Location history record was added to location history from the asset table.

The following log entries are currently related to activity in Work Orders only and will be found in the log note field.

"D" - The line item was added as a dynamic Work Order line item from the Transaction Table.

"R" - The record was added due to a ranged addition (a base record had a detail line added to it, a copy of which was added to all records in a range.)

"M" - An Add Template was performed. The newly created detail will all have this entry in the Log note field.

"S" and "2" - A work order line item was split automatically into two or more line items, the total of which equals the original line item. The original record will have an 'S', the new split out records will have a '2'.

"B" and "T" and "C" and "U" - The user did a manual entry of a line item by pushing one of the 'Add blank', 'Add Template', or 'Add Credit' buttons or entered a line item by entering a UPC value in the UPC scanner field.

FIELD LENGTH CHART

ASSET TABLE (ALIAS AS)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Accumulated Depr.	AC1ACC	N	12,2	999,999,999.99
2	Additional Cost	PL_ADD	N	12,2	999,999,999.99
3	Additional Cost in Basis	AB_ADD	L	1	
4	Archive Record Id	ARCRECID	C	10	
5	Asset #	ASSET_NO	C	12	
6	Beg. Depr. Accumulated	AS_PMAMT	N	12,2	999,999,999.99
7	Beg. Depr. Book Value Remaining	AS_PMRBOOK	N	12,2	999,999,999.99
8	Beg. Depr. Currency	AS_PMCRNCY	C	3	
9	Beg. Depr. End Date	AS_PMEDAT	D	8	
10	Beg. Depr. Method	AS_PMDTYP	C	5	
11	Beg. Depr. Note	AS_PMREM	C	50	
12	Beg. Depr. Start Date	AS_PMSDAT	D	8	
13	Book Value Remaining	AC1RBOOKV	N	12,2	999,999,999.99
14	Catalog Category (xx)	CAT_CODE	C	2	
15	Catalog Number (9999)	CAT_NUM	C	4	
16	Condition	COND	C	2	
17	Currency	CRNCY	C	3	USD
18	Current Bay	L_XLO07	C	5	
19	Current Building	L_BLDG	C	5	
20	Current Comments	L_NOTE	C	30	
21	Current Cost per Unit	L_CPERU	N	12,2	999,999,999.99
22	Current Floor	L_FLOOR	C	5	
23	Current Inventory Date	L_MOVEDAT	D	8	

24	Current Inventory Initials	L_MOVEBY	C	3	
25	Current Inventory Time	L_MOVETIM	C	6	99:99:99
26	Current Level	L_XLO09	C	5	
27	Current Location Descrip.	L_DESC	C	30	
28	Current Location Type	L_XLTYP	C	8	SITE
29	Current Name	L_NAME	C	20	
30	Current Quantity Added	L_QTY	N	9	99,999,999
31	Current Region	L_PRJREG	C	2	
32	Current Room	L_RM_AREA	C	6	
33	Current Room Tag	L_RM_TAG	C	8	
34	Current Row	L_XLO06	C	5	
35	Current Slot	L_XLO08	C	5	
36	Current Tag Or Take	L_TAGTAK	C	7	"UNKNOWN"
37	Current Vault	L_XLO05	C	5	
38	Current Work Order #	L_MOVENUM	C	12	
39	Depr. Adjusted Base Amt	AS_ABA	N	12,2	999999999.99
40	Depr. Adjusted Start Date	AS_ASD	D	8	
41	Depr. Base Amount	AC1COST	N	12,2	999999999.99
42	Depr. Calc Date	AC1LCDATE	D	8	
43	Depr. End Date	AS_DEDAT	D	8	
44	Depr. Fully Depreciated	AS_DEPCOM	L	1	Y or N
45	Depr. Life (mo)	AC1DELIFE	N	4	9999
46	Depr. Method	AC1DEPTYP	C	5	
47	Depr. Monthly Amount	AC1MODEP	N	12,2	999,999,999.99
48	Depr. Start Date	AC1RECDAT	D	8	
49	Depr. Org Code 1	AS_ORG01	C	6	
50	Depr. Org Code 1 %	AS_ORG01P	N	8,4	
51	Depr. Org Code 2	AS_ORG02	C	6	

52	Depr. Org Code 2 %	AS_ORG02P	N	8,4	
53	Depr. Org Code 3	AS_ORG03	C	6	
54	Depr. Org Code 3 %	AS_ORG03P	N	8,4	
55	Depr. Org Code 4	AS_ORG04	C	6	
56	Depr. Org Code 4 %	AS_ORG04P	N	8,4	
57	Depr. Org Code 5	AS_ORG05	C	6	
58	Depreciation Org Count	AS_ORGCNT	N	2	
59	Depreciation Org Total %	AS_ORGTP	C	16	
60	Depreciation Org Total % Req	AS_ORGTPR	N	8,4	
61	Disposal Buyer	AC_DISBYR	C	16	
62	Disposal Date	AC_DISDAT	D	8	
63	Disposal Gain (or Loss)	AC_DISGAIN	N	12,2	999,999,999.99
64	Disposal Type	AC_DISTYP	C	1	
65	First Fiscal Month	AS_1STFM	N	2	99
66	Freight	PL_FRGT	N	12,2	999,999,999.99
67	Freight in Basis	AB_FRGT	L	1	Y or N
68	Fund Number	AS_FUNDNO	C	15	
69	General Ledger #	AC1GLNUM	C	15	
70	General Ledger #2	AC1GLNUM2	C	15	
71	General Ledger #3	AC1GLNUM3	C	15	
72	Installation	PL_INST	N	12,2	999,999,999.99
73	Installation in Basis	AB_INST	L	1	Y or N
74	Inventory Comments	COMMENTS	C	30	
75	Keep Components Together	KEEPCPT	L	1	
76	Lease #	PL_NUM	C	20	
77	Lease Accumulated Cost	PL_ACCOST	N	12,2	999,999,999.99
78	Lease Amount	PL_LAMT	N	12,2	999,999,999.99
79	Lease Calc Method	PL_CMETH	C	4	NONE

80	Lease Duration(mo)	PL_DUR	N	4	9,999
81	Lease Ending Date	PL_END	D	8	
82	Lease Factor	PL_FACTOR	N	7,5	9.99999
83	Lease Lessor	PL_LESSOR	C	25	
84	Lease Payment/Month	PL_LPYMT	N	12,2	999,999,999.99
85	Lease Placed in Service Date	PL_START	D	8	
86	Lease Revision Date	PL_REVDAT	D	8	
87	Lease Year To Date Cost	PL_YTD	N	12,2	999,999,999.99
88	Log Add-Edit-Delete	LOGAED	C	1	
89	Log Alias	LOGALS	C	8	
90	Log Company Code	LOGCOCODE	C	8	
91	Log Date	LOGDATE	D	8	
92	Log Event Code	LOGEVENT	C	1	
93	Log Time	LOGTIME	C	8	
94	Log User	LOGUSER	C	3	
95	Log Universal Datetime (UDT)	LOGUDT	T	8	
96	Name	OW_NAME	C	20	
97	New Or Used	PL_NEWUSE	C	1	
98	Organization Code	OW_ORG	C	6	
99	Ownership Method	OW_METHOD	C	5	
100	Period #	AC_PERCUR	N	4	9,999
101	Period End Date	AC_PEREDAT	D	8	
102	Period Start Date	AC_PERSDAT	D	8	
103	Period Type	AC_PERTYP	C	10	Month
104	Periods Depreciated	AC_NPDEP	N	4	9,999
105	Periods Idle	AC_NPIDL	N	4	9,999
106	Periods Remaining	AC_NPLEFT	N	4	9,999
107	Prior Accumulated Depreciation	AC_PADEP	N	12,2	999,999,999.99

108	Prior Bay	O_XLO07	C	5	
109	Prior Building	O_BLDG	C	5	
110	Prior Comments	O_NOTE	C	30	
111	Prior Cost per Unit	O_CPERU	N	12,2	999,999,999.99
112	Prior Floor	O_FLOOR	C	5	
113	Prior Inventory Date	O_MOVEDAT	D	8	
114	Prior Inventory Initials	O_MOVEBY	C	3	
115	Prior Inventory Time	O_MOVETIM	C	6	99:99:99
116	Prior Label	AS_NOOLD	C	12	
117	Prior Level	O_XLO09	C	5	
118	Prior Location Descrip.	O_DESC	C	30	
119	Prior Location Type	O_XLTYP	C	8	SITE
120	Prior Name	O_NAME	C	20	
121	Prior Organization Code	POW_ORG	C	6	
122	Prior Periods Depreciated	AC_PNPDEP	N	4	9,999
123	Prior Periods Idle	AC_PNPIDL	N	4	9,999
124	Prior Periods Remaining	AC_PNPLEFT	N	4	9,999
125	Prior Quantity Added	O_QTY	N	9	99,999,999
126	Prior Region	O_PRJREG	C	2	
127	Prior Remaining Book	AC_PRBOOK	N	12,2	999,999,999.99
128	Prior Room	O_RM_AREA	C	6	
129	Prior Room Tag	O_RM_TAG	C	8	
130	Prior Row	O_XLO06	C	5	
131	Prior Slot	O_XLO08	C	5	
132	Prior Tag Or Take	O_TAGTAK	C	7	"UNKNOWN"
133	Prior Vault	O_XLO05	C	5	
134	Prior Work Order #	O_MOVENUM	C	12	
135	Purchase Cost	PL_COST	N	12,2	999,999,999.99

136	Purchase Cost in Basis	AB_COST	L	1	Y or N
137	Purchase Date	PL_DATE	D	8	
138	Purchase Order #	PL_PO	C	20	
139	Quantity Of Assets	AS_QTY	N	9	999,999,999
140	Received Date	PL_RECDAT	D	8	
141	Record Id	RECID	C	10	
142	Record Id-Location History-Current	L_RECID_LH	C	10	
143	Record Id-Location History-Prior	O_RECID_LH	C	10	
144	Record Id-Location Reference-Current	L_RECID_LO	C	10	
145	Record Id-Location Reference-Prior	O_RECID_LO	C	10	
146	Remark #1	AC_DISRM1	C	40	
147	Remark #2	AC_DISRM2	C	40	
148	Remark #3	AC_DISRM3	C	40	
149	Sales Value	AC_SALAMT	N	12,2	999,999,999.99
150	Salvage Value	AC_DISAMT	N	12,2	999,999,999.99
151	Salvage Value in Basis	AB_DISAMT	L	1	Y or N
152	Secondary #	PRIOR_NO	C	14	
153	Serial #	SERIAL_NO	C	25	
154	Status	STATUS	C	2	
155	System #	SY_NO	C	12	
156	Tax	PL_TAX	N	12,2	999,999,999.99
157	Tax in Basis	AB_TAX	L	1	Y or N
158	Telephone Number	OW_T_NO	C	14	(###)###-####:####
159	Total Cost	PL_TOT	N	12,2	999,999,999.99
160	Transfer Date	AS_XFERD	D	8	
161	Transfer Depreciation	AS_ACCDEP	N	12,2	999,999,999.99
162	Use Depreciation History	AC_USEDH	L	1	Y or N
163	Use Half Year Averaging Convention	AC_HYAC	L	1	Y or N

164	Vendor	VENDOR	C	16	
165	Year To Date Depr.	AC1YTD	N	12,2	999,999,999.99

CATALOG TABLE (ALIAS CA)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Additional Cost	PL_ADD	N	12,2	999,999,999.99
2	Attribute #1	ATTR_1	C	20	
3	Attribute #2	ATTR_2	C	20	
4	Attribute #3	ATTR_3	C	20	
5	Attribute #4	ATTR_4	C	20	
6	Attribute #5	ATTR_5	C	20	
7	Attribute #6	ATTR_6	C	20	
8	Attribute #7	ATTR_7	C	20	
9	Autocalc Charge Per Unit	CA_CALCMUP	L	1	Y or N
10	Catalog Attribute Set	ATTR_SET	N	2	99
11	Catalog Category (xx)	CAT_CODE	C	2	
12	Catalog Description	DESC	C	25	
13	Catalog Number (9999)	CAT_NUM	C	4	9999
14	Catalog Type	TYPE	C	10	
15	Charge per Unit	CA_CPERU	N	12,2	999,999,999.99
16	Comments required (in Transactions)	CA_RQCMT	L	1	Y or N
17	Default Depr. Life (mo)	AC1DELIFE	N	4	
18	Default Depr. Method	AC1DEPTYP	C	5	
19	Default Period Type	AC_PERTYP	C	10	
20	Depth	DEPTH	C	7	
21	Freight	PL_FRGT	N	12,2	999,999,999.99
22	Height	HEIGHT	C	7	
23	Installation	PL_INST	N	12,2	999,999,999.99

24	Log Add-Edit-Delete	LOGAED	C	1	
25	Log Alias	LOGALS	C	8	
26	Log Company Code	LOGCOCODE	C	8	
27	Log Date	LOGDATE	D	8	
28	Log Event Code	LOGEVENT	C	1	
29	Log Time	LOGTIME	C	8	
30	Log Universal Datetime (UDT)	LOGUDT	T	8	
31	Log User	LOGUSER	C	3	
32	Manufacturer	MV_NAME	C	16	
33	Manufacturer Line	MV_LINE	C	20	
34	Manufacturer Part No.	MV_PARTNO	C	20	
35	Manufacturer Tag No.	MV_TAGNO	C	20	
36	Mark up Percent	CA_MUPCT	N	8,4	999.9999
37	Purchase Cost	PL_COST	N	12,2	999,999,999.99
39	Record Id	RECID	C	10	
39	Revision Date (last)	REV_DATE	D	8	
40	Revision Initials	REV_BY	C	3	
41	Tax	PL_TAX	N	12,2	999,999,999.99
42	Transaction Allowed Serial # Sizes	CA_RQSERNO	C	20	
43	Transaction Comments required	CA_RQCMT	L	1	Y or N
44	Unit of Issue	CA_UOFI	C	5	EACH
45	Width/Radius	WIDTH	C	7	

COMPANY TABLE (ALIAS CO)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Add Month to Work Order #	CO_WMNOM	L	1	Y or N
2	Add Year to Work Order #	CO_WMNOY	L	1	Y or N
3	Additional Cost in Basis - Default Value	AB_ADD	L	1	Y or N
4	Allow CUSTOM Work Order screen	CO_EDCCUS	L	1	Y or N
5	Allow SHOPPING Work Order screen	CO_EDCSHP	L	1	Y or N
6	Allow STANDARD Work Order screen	CO_EDCSTD	L	1	Y or N
7	Allow fully blank locations	CO_ABLOC	L	1	Y or N
8	Asset # field length	COM_ANL	N	2	12
9	Asset #-Right Justify	CO_ASNORJ	L	1	Y or N
10	Asset #-Spaces To Zeroes	CO_ASNOSZ	L	1	Y or N
11	Asset Depr History-Default ON	CO_ASDHON	L	1	Y or N
12	Auto generate Org Codes	CO_ORAUTO	L	1	Y or N
13	Auxilliary Catalog Fields	CO_AUX_CA	M	4	
14	Auxilliary Organization Fields	CO_AUX_ORG	M	4	
15	Basis Checkboxes - Visible	AB_BASVIS	L	1	Y or N
16	Bay field length	CO_KBAY	N	2	5
17	Building field length	CO_KBLDG	N	2	5
18	Catalog Attribute field length	CO_KATTR	N	2	20
19	Catalog Code field length	CO_KCCODE	N	2	2
20	Catalog Number field length	CO_KCNUM	N	2	4
21	Catalog Units of Measure	CO_UOFM	C	7	INCHES
22	Catalog field length	CO_KCANO	N	2	6
23	Company Background Color	CO_BCOLOR	N	12	
24	Company Code	COMCODE	C	8	
25	Company Name	COMNAME	C	30	

26	Condition field length	CO_KCOND	N	2	2
27	Currency - Default Value	CRNCY	C	3	USD
28	Currency - Visible	AB_CURNCY	L	1	Y or N
29	Default Reserved Bill of Materials Filter	RVM_FILTER	M	4	
30	Default to Half Year Averaging Convention	AC_HYAC	L	1	Y or N
31	Depr. Min Life (mo)	DEP_ML	N	4	
32	Depr. Threshold	DEP_TH	N	12.2	
33	Depreciation Method field length	CO_KDMETH	N	2	5
34	Email Address length	CO_KEMAIL	N	2	0
35	First Fiscal Month-Default	CO_1STFMD	N	2	1
36	Floor field length	CO_KFLOOR	N	2	5
37	Freight in Basis - Default Value	AB_FRGT	L	1	Y or N
38	Initialize Work Order with UserName	CO_WMITNAM	L	1	Y or N
39	Installation in Basis - Default Value	AB_INST	L	1	Y or N
40	Inventory Comments length	CO_KASNOTE	N	2	30
41	Last Synchronization Date	CO_SLDATE	D	8	
42	Last Synchronization Time	CO_SLTIME	C	6	99:99:99
43	Lease # field length	CO_KLEASE	N	2	20
44	Length of Last Synchronization (minutes)	CO_SLDUR	N	4	9,999
45	Level field length	CO_KLEVEL	N	2	5
46	Location Type field length	CO_KLOCTYP	N	2	8
47	Log Add-Edit-Delete	LOGAED	C	1	?
48	Log Alias	LOGALS	C	8	
49	Log Company Code	LOGCOCODE	C	8	
50	Log Date	LOGDATE	D	8	
51	Log Event Code	LOGEVENT	C	1	
52	Log Last Synchronization Only	CO_SLLONLY	L	1	Y or N

53	Log Time	LOGTIME	C	8	
54	Log Universal Datetime (UDT)	LOGUDT	T	8	
55	Log User	LOGUSER	C	3	
56	Manufacturer field length	CO_KMVNAME	N	2	16
57	Name Format	NAME_ALG	C	20	
58	Name Validation	NAM_VLDTN	C	10	
59	Sets Inventory Time on Add/Template	CO_TRITIM	L	1	
60	Organization Code field length	CO_KORG	N	2	6
61	Owner Name length	CO_KOWNAME	N	2	20
62	Ownership Method field length	CO_KOWMETH	N	2	5
63	Plain Org Code	CO_PLNORG	L	1	Y or N
64	Prompt For Delete on Company Export	CO_P4DOCE	L	1	Y or N
65	Prompt for Work Order #	CO_WMP4NO	L	1	Y or N
66	Purchase Cost in Basis - Default Value	AB_COST	L	1	Y or N
67	Purchase Order # field length	CO_KPONO	N	2	20
68	Record Id	RECID	C	10	
69	Region field length	CO_KREG	N	2	2
70	Reminder-About Restructure	RMDSTRUC	L	1	
71	Reminder-About Restructure # of Week	RMDSTRUCE	N	2	
72	Reminder-About Restructure Start Week	RMDSTRUCB	N	2	
73	Require Print before moving Transactions	CO_RPB4M	L	1	Y or N
74	Room Tag field length	COM_RTL	N	2	8
75	Room Tag(s) to exclude for cost averaging	CO_RTAVGX	C	8	OUT%
76	Room field length	CO_KROOM	N	2	6
77	Round Calculated Currency	CO_RNDMNY	L	1	Y or N
78	Row field length	CO_KROW	N	2	5
79	Salvage Value in Basis - Default Value	AB_DISAMT	L	1	Y or N
80	Deprec. Split Among Org Codes Visable	CO_ASDS	L	1	Y or N

81	Slot field length	CO_KSLOT	N	2	5
82	Status field length	CO_KSTAT	N	2	2
83	Strip Label Check Digit	CO_STRIPCD	L	1	Y or N
84	Strip Label Serial # Prefix	CO_STRSER	C	5	
85	Synchronization Company #1	CO_SSDSN	C	250	
86	Synchronization Company #1 Sysuser Folder	CO_SSSYSU	C	250	
87	Synchronization Company #2	CO_STDSN	C	250	
88	Synchronization Company #2 Sysuser Folder	CO_STSYSU	C	250	
89	Synchronization Enabled	CO_SACTIVE	L	1	Y or N
90	Synchronization Frequency-Days	CO_SFREQD	N	2	
91	Synchronization Frequency-Hours	CO_SFREQH	N	2	
92	Synchronization Log	CO_SLOG	M	4	
93	Synchronization Password #1	CO_SSPSWD	C	20	
94	Synchronization Password #2	CO_STPSWD	C	20	
95	Synchronization Start Date	CO_SSDATE	D	8	
96	Synchronization Start Time	CO_SSTIME	C	6	99:99:99
97	Synchronization State	CO_SSTATE	C	13	Ready
98	Synchronization Table List	CO_STABLES	M	4	
99	Synchronization User ID #1	CO_SSID	C	20	
100	Synchronization User ID #2	CO_STID	C	20	
101	Synchronize How Often	CO_SFREQ	C	12	Once
102	Synchronize When	CO_SWHEN	C	12	Now
103	Tax in Basis - Default Value	AB_TAX	L	1	Y or N
104	Telephone Input Mask	CO_PHONMSK	C	25	(###)###-####:####
105	Time Zone Shift (Hrs)	CO_SSHIFT	N	3	
106	UPC Code field length	CO_KUPC	N	2	30
107	Use locations in locations-W.O. Shopping	CO_WMLILO	L	1	Y or N

108	User ID length	CO_KUSNO	N	2	3
109	Valid Year - First	CO_VYR1ST	N	4	1920
110	Valid Year - Last	CO_VYRLST	N	4	2080
111	Validate Bay	X_XLO07	L	1	Y or N
112	Validate Building	X_BLDG	L	1	Y or N
113	Validate Floor	X_FLOOR	L	1	Y or N
114	Validate Level	X_XLO09	L	1	Y or N
115	Validate Region	X_PRJREG	L	1	Y or N
116	Validate Room	X_RM_AREA	L	1	Y or N
117	Validate Row	X_XLO06	L	1	Y or N
118	Validate Slot	X_XLO08	L	1	Y or N
119	Validate Vault	X_XLO05	L	1	Y or N
120	Validate Work Order Bay	WX_XLO07	L	1	Y or N
121	Validate Work Order Building	WX_BLDG	L	1	Y or N
122	Validate Work Order Floor	WX_FLOOR	L	1	Y or N
123	Validate Work Order Level	WX_XLO09	L	1	Y or N
124	Validate Work Order Region	WX_PRJREG	L	1	Y or N
125	Validate Work Order Room	WX_RM_AREA	L	1	Y or N
126	Validate Work Order Row	WX_XLO06	L	1	Y or N
127	Validate Work Order Slot	WX_XLO08	L	1	Y or N
128	Validate Work Order Vault	WX_XLO05	L	1	Y or N
129	Variable Asset Number Length	CO_VANL	L	1	Y or N
130	Variable Catalog Number Length	CO_VCANUM	L	1	Y or N
131	Variable Room Tag Length	CO_VRTL	L	1	Y or N
132	Vault field length	CO_KVAULT	N	2	5
133	Work Order # field length	CO_KWRKO	N	2	12
134	Z Asset bucket Auxiliary Fields	CO_ZB	M	4	

CONDITION TABLE (ALIAS CN)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Condition Code	CN_CODE	C	2	
2	Condition Description	CN_DESC	C	25	
3	Condition Expression	CN_EXPR	C	4	
4	Condition Reference	CN_REF	C	4	
5	Log Add-Edit-Delete	LOGAED	C	1	?
6	Log Alias	LOGALS	C	8	
7	Log Date	LOGDATE	D	8	
8	Log Event Code	LOGEVENT	C	1	
9	Log Time	LOGTIME	C	8	
10	Log Universal Datetime (UDT)	LOGUDT	T	8	
11	Log User	LOGUSER	C	3	
12	Record Id	RECID	C	10	

DEPRECIATION HISTORY TABLE (ALIAS DH)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Accumulated Depreciation	AC1ACC	N	12,2	999,999,999.99
2	Archive Record Id	ARCRECID	C	10	
3	Asset #	ASSET_NO	C	12	
4	Book Value Remaining	AC1RBOOKV	N	12,2	999,999,999.99
5	Currency	CRNCY	C	3	USD
6	Depr. End Date	AS_DEDAT	D	8	
7	Depr. Fully Depreciated	AS_DEPCOM	L	1	Y or N
8	Depr. Method	AC1DEPTYP	C	5	
9	Depr. Monthly Amount	AC1MODEP	N	12,2	999,999,999.99
10	Fund Number	AS_FUNDNO	C	15	
11	General Ledger #	AC1GLNUM	C	15	
12	General Ledger #2	AC1GLNUM2	C	15	
13	General Ledger #3	AC1GLNUM3	C	15	
14	Log Add-Edit-Delete	LOGAED	C	1	?
15	Log Alias	LOGALS	C	8	
16	Log Date	LOGDATE	D	8	
17	Log Event Code	LOGEVENT	C	1	
18	Log Time	LOGTIME	C	8	
19	Log Universal Datetime (UDT)	LOGUDT	T	8	
20	Log User	LOGUSER	C	3	
21	Master Record Record Id	MASRECID	C	10	
22	Organization Code	OW_ORG	C	6	
23	Period #	AC_PERCUR	N	4	9,999
24	Period End Date	AC_PEREDAT	D	8	
25	Period Start Date	AC_PERSDAT	D	8	
26	Period Type	AC_PERTYP	C	10	Month

27	Periods Depreciated	AC_NPDEP	N	4	9,999
28	Periods Idle	AC_NPIDL	N	4	9,999
29	Periods Remaining	AC_NPLEFT	N	4	9,999
30	Prior Accumulated Depreciation	AC_PADEP	N	12,2	999,999,999.99
31	Prior Organization Code	POW_ORG	C	6	
32	Prior Periods Depreciated	AC_PNPDEP	N	4	9,999
33	Prior Periods Idle	AC_PNPIDL	N	4	9,999
34	Prior Periods Remaining	AC_PNPLEFT	N	4	9,999
35	Prior Remaining Book	AC_PRBOOK	N	12,2	999,999,999.99
36	Record Id	RECID	C	10	
37	Status	STATUS	C	2	
38	Transfer Date	AS_XFERD	D	8	
39	Transfer Depreciation	AS_ACCDEP	N	12,2	999,999,999.99
40	Year To Date Depr.	AC1YTD	N	12,2	999,999,999.99

LEASE TABLE (ALIAS LE)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Calc Method	PL_CMETH	C	4	NONE
2	Date Placed in Service	PL_START	D	8	
3	Duration(mo)	PL_DUR	N	4	9,999
4	End Date	PL_END	D	8	
5	Lease #	PL_NUM	C	20	
6	Lease Factor	PL_FACTOR	N	7,5	9.99999
7	Lessor	PL_LESSOR	C	25	
8	Log Add-Edit-Delete	LOGAED	C	1	
9	Log Alias	LOGALS	C	8	
10	Log Date	LOGDATE	D	8	
11	Log Universal Datetime (UDT)	LOGUDT	T	8	
12	Log Event Code	LOGEVENT	C	1	
13	Log Time	LOGTIME	C	8	
14	Log User	LOGUSER	C	3	
15	Record Id	RECID	C	10	
16	Total Cost	PL_LTOT	N	12,2	999,999,999.99
17	Total Payment/Month	PL_LPYMT	N	12,2	999,999,999.99

LOCATION TABLE (ALIAS LO)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Bay	XLO07	C	5	
2	Building	BLDG	C	5	
3	Floor	FLOOR	C	5	
4	Level	XLO09	C	5	
5	Location Description	LOC_DESC	C	30	
6	Location Type	XLTYP	C	8	SITE
7	Log Add-Edit-Delete	LOGAED	C	1	?
8	Log Alias	LOGALS	C	8	
9	Log Date	LOGDATE	D	8	
10	Log Event Code	LOGEVENT	C	1	
11	Log Time	LOGTIME	C	8	
12	Log Universal Datetime (UDT)	LOGUDT	T	8	
13	Log User	LOGUSER	C	3	
14	Record Id	RECID	C	10	
15	Reference Organization	OW_ORG	C	6	
16	Region	PRJREG	C	2	
17	Room	RM_AREA	C	6	
18	Room Tag	RM_TAG	C	8	
19	Row	XLO06	C	5	
20	Slot	XLO08	C	5	
21	Square Footage	SQFT	N	7,2	9,999.99
22	Vault	XLO05	C	5	

ASSET LOCATION HISTORY TABLE (ALIAS LH)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Archive Record Id	ARCRECID	C	10	
2	Asset #	ASSET_NO	C	12	
3	Bay	O_XLO07	C	5	
4	Building	O_BLDG	C	5	
5	Comments	O_NOTE	C	30	
6	Cost per Unit	O_CPERU	N	12,2	999,999,999.99
7	Description	O_DESC	C	30	
8	Floor	O_FLOOR	C	5	
9	Handheld Computer File	RDRFILE	C	12	
10	Handheld Computer File Record #	RDRREC	N	4	
11	Handheld Computer ID	RDRID	C	50	
12	Inventoried By	O_MOVEBY	C	3	
13	Inventory Date	O_MOVEDAT	D	8	
14	Inventory Time	O_MOVETIM	C	6	99:99:99
15	Level	O_XLO09	C	5	
16	Location Type	O_XLTYP	C	8	SITE
17	Log Add-Edit-Delete	LOGAED	C	1	?
18	Log Alias	LOGALS	C	8	
19	Log Date	LOGDATE	D	8	
20	Log Event Code	LOGEVENT	C	1	
21	Log Time	LOGTIME	C	8	
22	Log Universal Datetime (UDT)	LOG UDT	D	8	
23	Log User	LOGUSER	C	3	
24	Master Record Record Id	MASRECID	C	10	
25	Name	O_NAME	C	20	
26	Quantity Added	O_QTY	N	9	999,999,999

27	Record Id	RECID	C	10	
28	Record Id-Location	O_RECID_LO	C	10	
29	Record Id-Work Order Line Item	O_RECID_WD	C	10	
30	Region	O_PRJREG	C	2	
31	Room	O_RM_AREA	C	6	
32	Room Tag	O_RM_TAG	C	8	
33	Row	O_XLO06	C	5	
34	Slot	O_XLO08	C	5	
35	Tag Or Take	TAGTAK	C	7	"UNKNOWN"
36	Update Date	UPDDATE	D	8	
37	Update Initials	UPDUSNO	C	3	
38	Update Operation	UPDOP	C	1	
39	Update Time	UPDTIME	C	8	
40	Vault	O_XLO05	C	5	
41	Work Order #	O_MOVENUM	C	12	

MANUFACTURER TABLE (ALIAS MA)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Alternate Address 1	MV_2ADDR1	C	25	
2	Alternate Address 2	MV_2ADDR2	C	25	
3	Alternate City	MV_2CITY	C	15	
4	Alternate Fax/Telex	MV_2FAX	C	14	(###)###-####:####
5	Alternate State	MV_2STAT	C	2	
6	Alternate Telephone	MV_2TELE	C	14	(###)###-####:####
7	Alternate Zip	MV_2ZIP	C	10	
8	Catalog Category List	MV_CATS	C	60	
9	Contact	MV_CONTCT	C	20	
10	Contact Address 1	MV_1ADDR1	C	25	
11	Contact Address 2	MV_1ADDR2	C	25	
12	Contact City	MV_1CITY	C	15	
13	Contact Fax/Telex	MV_TELEX	C	14	(###)###-####:####
14	Contact State	MV_1STAT	C	2	
15	Contact Telephone	MV_1TELE	C	14	(###)###-####:####
16	Contact Zip	MV_1ZIP	C	10	
17	Log Add-Edit-Delete	LOGAED	C	1	?
18	Log Alias	LOGALS	C	8	
19	Log Date	LOGDATE	D	8	
20	Log Universal Datetime (UDT)	LOGUDT	T	8	
21	Log Event Code	LOGEVENT	C	1	
22	Log Time	LOGTIME	C	8	
23	Log User	LOGUSER	C	3	
24	Manufacturer	MV_NAME	C	16	
25	Record Id	RECID	C	10	

ORGANIZATION TABLE (ALIAS ORG)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Department	OW_ORGL2	C	12	
2	Division	OW_ORGL1	C	12	
3	Log Add-Edit-Delete	LOGAED	C	1	?
4	Log Alias	LOGALS	C	8	
5	Log Date	LOGDATE	D	8	
6	Log Event Code	LOGEVENT	C	1	
7	Log Time	LOGTIME	C	8	
8	Log Universal Datetime (UDT)	LOGUDT	T	8	
9	Log User	LOGUSER	C	3	
10	Organization Code	OW_ORG	C	6	
11	Record Id	RECID	C	10	
12	Unit	OW_ORGL3	C	12	

PERSONNEL TABLE (ALIAS PER)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Current Bay	L_XLO07	C	5	
2	Current Building	L_BLDG	C	5	
3	Current Floor	L_FLOOR	C	5	
4	Current Level	L_XLO09	C	5	
5	Current Location Descrip.	L_DESC	C	30	
6	Current Location Type	L_XLTYP	C	8	
7	Current Region	L_PRJREG	C	2	
8	Current Room	L_RM_AREA	C	6	
9	Current Room Tag	L_RM_TAG	C	8	
10	Current Row	L_XLO06	C	5	
11	Current Slot	L_XLO08	C	5	
12	Current Vault	L_XLO05	C	5	
13	Email Address	PEREMAIL	C	50	
14	First Name	F_NAME	C	15	
15	Full Name	FULLNAME	C	20	
16	Initials	INITS	C	5	
17	Last Name	L_NAME	C	15	
18	Log Add-Edit-Delete	LOGAED	C	1	
19	Log Alias	LOGALS	C	8	
20	Log Company Code	LOGCOCODE	C	8	
21	Log Date	LOGDATE	D	8	
22	Log Event Code	LOGEVENT	C	1	
23	Log Time	LOGTIME	C	8	

No.	Field Name	Variable Name	Type	Field Length	Comment
24	Log Universal Datetime (UDT)	LOGUDT	T	8	
25	Log User	LOGUSER	C	3	
26	Middle Name	M_NAME	C	15	
27	Organization Code	OW_ORG	C	6	
28	Primary ID	PRIID	C	15	
29	Record ID	RECID	C	10	
30	Secondary ID	SECID	C	15	
31	Telephone Number	OW_T_NO	C	14	
32	Tertiary ID	TERID	C	15	
33	Uniqueness Value	UNIQER	C	10	

STATUS TABLE (ALIAS ST)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Log Add-Edit-Delete	LOGAED	C	1	?
2	Log Alias	LOGALS	C	8	
3	Log Date	LOGDATE	D	8	
4	Log Event Code	LOGEVENT	C	1	
5	Log Time	LOGTIME	C	8	
6	Log Universal Datetime (UDT)	LOGUDT	T	8	
7	Log User	LOGUSER	C	3	
8	Record Id	RECID	C	10	
9	Status Code	ST_CODE	C	2	
10	Status Description	ST_DESC	C	25	
11	Status Expression	ST_EXPR	C	4	
12	Status Reference	ST_REF	C	4	

TRANSACTION TABLE (ALIAS TR)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Asset #	ASSET_NO	C	12	
2	Catalog Category (xx)	CAT_CODE	C	2	
3	Catalog Number (9999)	CAT_NUM	C	4	9999
4	Company Code	COMCODE	C	8	
5	Condition	COND	C	2	
6	Cost per Unit	TR_CPERU	N	12,2	999,999,999.99
7	Current Bay	L_XLO07	C	5	
8	Current Building	L_BLDG	C	5	
9	Current Floor	L_FLOOR	C	5	
10	Current Level	L_XLO09	C	5	
11	Current Location Type	L_XLTYP	C	8	SITE
12	Current Region	L_PRJREG	C	2	
13	Current Room	L_RM_AREA	C	6	
14	Current Room Tag	L_RM_TAG	C	8	
15	Current Row	L_XLO06	C	5	
16	Current Slot	L_XLO08	C	5	
17	Current Vault	L_XLO05	C	5	
18	Currently Accessible	TR_ACCESS	L	1	T for True
19	Errors treated as Warnings	TR_E2W	L	1	
20	Handheld Computer File	RDRFILE	C	12	
21	Handheld Computer File Record #	RDRREC	N	4	
22	Handheld Computer ID	RDRID	C	50	
23	Inventory Comments	COMMENT	C	30	
24	Inventory Date	INV_DATE	D	8	
25	Inventory Initials	INV_BY	C	3	

26	Inventory Time	INV_TIME	C	6	99:99:99
27	Log Add-Edit-Delete	LOGAED	C	1	?
28	Log Alias	LOGALS	C	8	
29	Log Date	LOGDATE	D	8	
30	Log Universal Datetime (UDT)	LOGUDT	T	8	
31	Log Event Code	LOGEVENT	C	1	
32	Log Time	LOGTIME	C	8	
33	Log User	LOGUSER	C	3	
34	Name	OW_NAME	C	20	
35	New Asset #	NEW_RMAS	C	12	
36	Old Asset #	RM_AS_GS	C	12	
37	On Hold	HOLD	L	1	Y or N
38	Organization Code	OW_ORG	C	6	
39	Ownership Method	OW_METHOD	C	5	
40	Printed	PRINTED	L	1	Y or N
41	Prior Bay	O_XLO07	C	5	
42	Prior Building	O_BLDG	C	5	
43	Prior Floor	O_FLOOR	C	5	
44	Prior Level	O_XLO09	C	5	
45	Prior Location Type	O_XLTYP	C	8	SITE
46	Prior Region	O_PRJREG	C	2	
47	Prior Room	O_RM_AREA	C	6	
48	Prior Room Tag	O_RM_TAG	C	8	
49	Prior Row	O_XLO06	C	5	
50	Prior Slot	O_XLO08	C	5	
51	Prior Vault	O_XLO05	C	5	
52	Problem Indicator	PROBLEM	C	80	

53	Purchase Order #	PL_PO	C	20	
54	Quantity Of Assets	TR_QTY	N	9	99,999,999
55	Reader File	RDRFILE	C	12	
56	Reader File Record #	RDRREC	N	4	9,999
57	Reader ID	RDRID	C	36	
58	Record Id	RECID	C	10	
59	Replace Asset Label	TR_REPAS	L	1	Y or N
60	Reserved Bill of Material #	RVNUM	C	12	
61	Secondary #	PRIOR_NO	C	14	
62	Serial #	SERIAL_NO	C	25	
63	Status	STATUS	C	2	
64	System #	SY_NO	C	12	
65	Tag Or Take	TR_TAGTAK	C	7	"UNKNOWN"
66	Telephone Number	OW_T_NO	C	14	(###)###-####:####
67	Transaction #	TRANS_NUM	C	3	
68	UDF Reader Field #1	CUS_01	C	40	
69	UDF Reader Field #2	CUS_02	C	40	
70	UDF Reader Field #3	CUS_03	C	40	
71	UDF Reader Field #4	CUS_04	C	40	
72	Work Order #	L_MOVENUM	C	12	

UPC TABLE (ALIAS UPC)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Catalog Category (xx)	CAT_CODE	C	2	
2	Catalog Number (9999)	CAT_NUM	C	4	9999
3	Log Add-Edit-Delete	LOGAED	C	1	?
4	Log Alias	LOGALS	C	8	
5	Log Date	LOGDATE	D	8	
6	Log Event Code	LOGEVENT	C	1	
7	Log Time	LOGTIME	C	8	
8	Log Universal Datetime (UDT)	LOGUDT	T	8	
9	Log User	LOGUSER	C	3	
10	Record Id	RECID	C	10	
11	Upc Code	UPC_NO	C	30	

WORK ORDER DETAIL TABLE (ALIAS WD)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Activity Date	WD_ADATE	D	8	
2	Activity Time	WD_ATIME	C	6	99:99:99
3	Asset #	ASSET_NO	C	12	
4	Catalog (xx9999)	CA_NO	C	6	
5	Catalog Description	WD_DESC	C	25	
6	Charge per Unit	WD_CPERU	N	12,2	999,999,999.99
7	Complete-Line Item	COMPLETE	L	1	Y or N
8	Date Qty Received Last Changed	WD_RCVDD	D	8	
9	Deliver To Bay	L_XLO07	C	5	
10	Deliver To Building	L_BLDG	C	5	
11	Deliver To Floor	L_FLOOR	C	5	
12	Deliver To Level	L_XLO09	C	5	
13	Deliver To Location Type	L_XLTYP	C	8	SITE
14	Deliver To Region	L_PRJREG	C	2	
15	Deliver To Room	L_RM_AREA	C	6	
16	Deliver To Room Tag	L_RM_TAG	C	8	
17	Deliver To Row	L_XLO06	C	5	
18	Deliver To Slot	L_XLO08	C	5	
19	Deliver To Vault	L_XLO05	C	5	
20	Hours-Actual	WD_LHRSA	N	12,2	999,999,999.99
21	Hours-Estimated	WD_LHRSE	N	12,2	999,999,999.99
22	Labor Cost-Actual	WD_LCOSTA	N	12,2	999,999,999.99
23	Labor Cost-Estimated	WD_LCOSTE	N	12,2	999,999,999.99
24	Labor Rate per hour	WD_LRATE	N	12,2	999,999,999.99
25	Line #	L_LINENO	C	3	

26	Line Item Note	L_DESC	C	60	
27	Log Add-Edit-Delete	LOGAED	C	1	?
28	Log Alias	LOGALS	C	8	
29	Log Copied Line #	LOGCITEM	C	3	
30	Log Date	LOGDATE	D	8	
31	Log Date when first Added	LOGDATEA	D	8	
32	Log Event Code	LOGEVENT	C	1	
33	Log Note	LOGNOTE	C	10	
34	Log Time	LOGTIME	C	8	
35	Log Time when first Added	LOGTIMEA	C	8	
36	Log User	LOGUSER	C	3	
37	Log User when first Added	LOGUSERA	C	3	
38	Log Universal Datetime (UDT)	LOGUDT	T	8	
39	Master Record Record Id	MASRECID	C	10	
40	Msg Displayed-Insufficient Qty	WD_ENUFMSG	L	1	Y or N
41	Purchase Order #	PL_PO	C	20	
42	Quantity Received	L_QTYRCVD	N	10	999,999,999
43	Quantity Requested	L_QTYRQST	N	10	999,999,999
44	Quantity Reserved	L_QTYRSVD	N	10	999,999,999
45	Record Id	RECID	C	10	
46	Ship From Bay	O_XLO07	C	5	
47	Ship From Building	O_BLDG	C	5	
48	Ship From Floor	O_FLOOR	C	5	
49	Ship From Level	O_XLO09	C	5	
50	Ship From Location Type	O_XLTYP	C	8	SITE
51	Ship From Region	O_PRJREG	C	2	
52	Ship From Room	O_RM_AREA	C	6	

53	Ship From Room Tag	O_RM_TAG	C	8	
54	Ship From Row	O_XLO06	C	5	
55	Ship From Slot	O_XLO08	C	5	
56	Ship From Vault	O_XLO05	C	5	
57	Supplies Cost-Actual	WD_SUPLYA	N	12,2	999,999,999.99
58	Supplies Cost-Estimated	WD_SUPLYE	N	12,2	999,999,999.99
59	Time Qty Received Last Changed	WD_RCVDT	C	8	
60	Total Cost-Actual	WD_TOTALA	N	12,2	999,999,999.99
61	Total Cost-Estimated	WD_TOTALE	N	12,2	999,999,999.99
62	Unit of Issue	WD_UOFI	C	5	
63	UPC code	WD_UPCNO	C	30	
64	Work Order #	L_MOVENUM	C	12	

WORK ORDER MASTER TABLE (ALIAS WM)

No.	Field Name	Variable Name	Type	Field Length	Comment
1	Account	AC1GLNUM	C	14	
2	Assigned To	WM_CREW	C	20	
3	Batch Operations-Allowed	WM_BATOK	L	1	Y or N
4	Batch Operations-Batch Id	WM_BATID	C	10	
5	Batch Operations-Date	WM_BATJD	D	8	
6	Batch Operations-Error Messages	WM_BATERRM	M	4	
7	Batch Operations-On Hold	WM_BATHOLD	L	1	Y or N
8	Batch Operations-Operation Was Done	WM_BATDONE	L	1	Y or N
9	Batch Operations-Time	WM_BATJT	C	6	99:99:99
10	Batch Operations-Work Order Has Errors	WM_BATERR	L	1	Y or N
11	Complete-Whole Work Order	COMPLETE	L	1	Y or N
12	Completed By	WM_BCMPLT	C	20	
13	Created-Work Order	WM_CREATD	L	1	Y or N
14	Date-Completed	WM_DCMPLT	D	8	
15	Date-Created	WM_DATE	D	8	
16	Date-Deliver To	L_MOVEDAT	D	8	
17	Date-Follow Up	WM_FUDATE	D	8	
18	Date-Printed	WM_DPRN	D	8	
19	Date-Requested	WM_RBDATE	D	8	
20	Deliver To Bay	L_XLO07	C	5	
21	Deliver To Building	L_BLDG	C	5	
22	Deliver To Floor	L_FLOOR	C	5	
23	Deliver To Level	L_XLO09	C	5	
24	Deliver To Location Type	L_XLTYP	C	8	SITE
25	Deliver To Org Code	WM_DOWORG	C	6	

26	Deliver To Region	L_PRJREG	C	2	
27	Deliver To Room	L_RM_AREA	C	6	
28	Deliver To Room Tag	L_RM_TAG	C	8	
29	Deliver To Row	L_XLO06	C	5	
30	Deliver To Slot	L_XLO08	C	5	
31	Deliver To Vault	L_XLO05	C	5	
32	Dynamic Work Order	WM_DYNAM	L	1	Y or N
33	Edit Form	EDITFORM	C	10	STANDARD
34	Follow Up Notes	WM_FOLLUP	M	4	
35	Hold	WM_HOLD	L	1	Y or N
36	Instructions/Notes	WM_OTHER	M	4	
37	Log Add-Edit-Delete	LOGAED	C	1	?
38	Log Alias	LOGALS	C	8	
39	Log Copied Work Order	LOGCITEM	C	12	
40	Log Date	LOGDATE	D	8	
41	Log Event Code	LOGEVENT	C	1	
42	Log Time	LOGTIME	C	8	
43	Log Universal Datetime (UDT)	LOGUDT	T	8	
44	Log User	LOGUSER	C	3	
45	Manufacturer	MV_NAME	C	16	
46	Name-Requested By	OW_NAME	C	20	
47	Name-Taken By	WM_TBNAME	C	30	
48	Organization Code	OW_ORG	C	6	
49	Printed (work Order)	PRINTED	L	1	Y or N
50	Priority	WM_WPNO	C	2	
51	Purchase Order #	PL_PO	C	20	
52	Record Id	RECID	C	10	

53	Requested By Bay	WM_RXLO07	C	5	
54	Requested By Building	WM_RBLDG	C	5	
55	Requested By Floor	WM_RFLOOR	C	5	
56	Requested By Level	WM_RXLO09	C	5	
57	Requested By Locatn Type	WM_RXLTYP	C	8	SITE
58	Requested By Region	WM_RREG	C	2	
59	Requested By Room	WM_RRM	C	6	
60	Requested By Room Tag	WM_RRMTAG	C	8	
61	Requested By Row	WM_RXLO06	C	5	
62	Requested By Slot	WM_RXLO08	C	5	
63	Requested By Vault	WM_RXLO05	C	5	
64	Telephone Number	OW_T_NO	C	14	(###)###-####:####
65	Time-Completed	WM_TCMPLT	C	6	99:99:99
66	Time-Created	WM_TBTIME	C	6	99:99:99
67	Time-Follow Up	WM_FUTIME	C	6	99:99:99
68	Time-Printed	WM_TPRN	C	6	99:99:99
69	Work Order #	L_MOVENUM	C	12	

ACTIVITY LOG TABLES

The Activity Log Tables can be useful if you wish to select items that have changed over time. Their structures are identical to their representative data table.

Instead of containing all records, the Activity Log tables only contain records for items that have changed. More than one entry for the same item can exist.

Since their structure is the same as their representative data, the structures are not repeated here.

SCRIPTING FEATURE

Introduction

Scripting functions are designed to help the Bar|Scan administrator control startup settings and actions in a Bar|Scan initialization (.bini) file. The .bini file can literally login, change some of the system's default folder, perform some actions (such as print a report or do an import), issue a message to the user then either turn over control to them as normal or automatically logout. It can also force a logout after a fixed time period of inactivity.

Overview

The Bar|Scan initialization file (.bini) can be used in two major scenarios.
A. All users will execute the instructions of a common .bini file.

B. Individual .bini files can be specified to perform specific actions (such as being associated with a desktop shortcut).

Filenames

A. The default filename is BSYSPATH.BINI. Bar|Scan will look for this filename in the same folder as the application file. If present, it will load it and run it.

B. Bar|Scan can also take a filename as a line item parameter. Line item parameters can be specified in the COMMAND box (CMD for Windows XP, 2003 server and Vista) or in shortcuts. These can be any legal filename and reside anywhere on your computer or network as long as it is accessible.

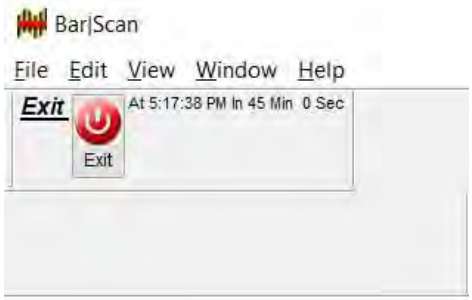
For example, assume that you want to create a special operation set to be executed each night. This you can do with Windows Task Scheduler. Since you want a different set of operations to be done than what is normally done by your users you must create a separate .bini file. In Task Scheduler there is a line to enter your program, so you would enter c:\Bar|Scanw\Bar|Scanw.exe. For your argument you would enter the path to the .bini file, such as c:\Bar|Scanw\users\bsyspath_mas.bini (don't use this path, but the actual path to your actual .bini file).

In Windows, there is an actual text box to enter the argument, which is the fully qualified path+filename of the .bini file. If you have any spaces in the path or .bini filename then you need to enclose it in quote marks.

e.g. C:\Barscanw\Barscanw.exe “m:\other folder\bsyspath.bini”

Interaction

There can be interaction between the desktop user and the scripting. For example, Bar|Scan will display the amount of time remaining to a shutdown because of user inactivity as shown in the example below:



Contents

A. The bini file is structured similar to many initialization files. It is broken up into major sections, with line item parameters or instructions within each section.

B. There are three major sections. Section titles are specified by a section name enclosed in square brackets. No spaces are allowed and they must be uppercase.

i [LOGIN]
This section is where you specify the user initials and password.
ii. [PATHS]
This section is where you override system paths.

iii. [ACTIONS]

This section is where you specify any startup processes that you want performed before the user gets control.

C. [LOGIN]

i. The [LOGIN] section specifies the information needed to login to Bar|Scan.
ii. There are two parameters available. The parameter name is specified then followed by an '=' sign, then the value. Do not include the angle brackets (<>).

1. ID=<User Initials>
2. PASSWORD=<Password>

iii. For example:

```
[LOGIN]
ID=MAS
PASSWORD=MASTER
```

D. [PATHS]

i. The [PATHS] section is used to override the default paths used by Bar|Scan upon startup and operation. For example, the SYSHOME path name redirects ALL paths so that Bar|Scan will look for all of its system folders below the specified folder. This is normally used to place the Bar|Scan executable program on a remote workstation but have it look at a server for its system files. This increases remote startup speed.
ii. There are several path names available. First specify the path name, then an equal sign, then the new path.

1. SYSHOME=<newpath>
2. SYSUSER=<newpath>
3. SYSDBF=<newpath>
4. READER=<newpath>
5. TEMPLATE=<newpath>
6. TEMP=<newpath>
7. REPORTS=<newpath>
8. USER=<newpath>

iii. With the exception of SYSHOME, the path name is the same as the Bar|Scan system folder name that is being redirected. Note that SYSHOME needs to go first if it is specified or else previously specified paths will be reset.

E. [ACTIONS]

i. The [ACTIONS] section specifies a set of operations to be performed upon startup. There are a number of commands that can be used, so startup can be quite extensive. This is especially useful if you want to have all users start up with a common set of operations. For example, you can specify a startup message that all users will see every time they login. Commands also have parameters to control their operation. See the explanation of each command for how to use it and its parameters.
ii. The following commands are available. Please note that all commands start with the left angle bracket (greater than sign), this is part of the text of the command and serves to differentiate it from the parameter lines. In alphabetical order they are:

1. >ENABLED
2. >GOTO
3. >IMPORT
4. >INACTIVITYTIMEOUT
5. >LABEL
6. >MOVE
7. >MSG
8. >OPEN COMPANY
9. >PACK
10. >REINDEX
11. >REPORT
12. >RESTRUCTURE
13. >SHUTDOWN
14. >VALIDATE

iii. >ENABLED
1. This command, anywhere in the list of commands, will specify whether or not the entire [ACTION] section is ignored. If enabled is true, commands in the [ACTIONS] section are executed as specified. If enabled is false, no commands are executed, the entire section is ignored. ENABLED TRUE is the default setting if not present, causing all commands to be executed starting at the first command.

2. This is a single line command. The format is:

>ENABLED TRUE
>ENABLED FALSE

iv. >GOTO
1. This command is paired with the LABEL command. A label name is specified and control moves to the command immediately following the label.
2. This is a single line command. The format is:

>GOTO <labelname>

3. For example:

>GOTO ALLDONE
…<MISCELLANEOUS OPERATIONS>
>LABEL ALLDONE
>MSG All Operations have been completed.

v. >IMPORT
1. This command will perform the formatted import or export specified.
2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. The first (NAME) is required.
    1. NAME=<EXACT NAME OF THE FORMATTED IMPORT/EXPORT>
    2. ONERROR=<label name>
3. For example: Assume you have a formatted import entitled ‘MY SPECIAL IMPORT FROM MY HR SYSTEM’

```
>IMPORT
NAME=MY SPECIAL IMPORT FROM MY HR SYSTEM
ONERROR=BADIMPORT
>MSG “The import was successful.”
>GOTO Alldone
>LABEL BADIMPORT
>MSG “The import didn’t work”
>LABEL ALLDONE
```

vi. >INACTIVITYTIMEOUT

1. This command sets the inactivity timeout. In other words, if Bar|Scan has no user interaction for the specified number of minutes, Bar|Scan will attempt to logoff and shutdown. There are some situations where this may not be possible. Additionally, the timing is only approximate.

2. This is a multiline command. Each of the parameters should be on its own line. It has one parameter. It is required.

1. MINUTES=<Number of minutes>

3. For example:

```
>MSG “Your station will logout after 30 minutes of inactivity”
>INACTIVITYTIMEOUT
MINUTES=30
>LABEL ALLDONE
```

vii. >LABEL

1. This command gives a name to a location in your command list so that other commands can jump to this location immediately, such as by using the GOTO command or an ONERROR parameter.

2. This is a single line command. It’s format is as follows:

```
>GOTO <labelname>
```

3. For example, in the following script the MSG command will be skipped.

```
>GOTO ALLDONE
>MSG THIS LINE IS SKIPPED
>LABEL ALLDONE
```

viii. >MOVE

1. This command MOVES assets from the Transaction table to the Asset table.

2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. By default ALL eligible assets are moved. If there are any errors then none of them are moved (i.e., this is the same as progressive commit being turned off). If you use the PARTIAL command, you can activate partial moves (i.e., this is the same as progressive commit being turned on). In this case, each transaction is moved independent of any errors in other transactions.

a. ONERROR=<label name>
b. PARTIAL=<TRUE or FALSE>
3. For example: Assume you have a company called ‘COMPANY.DBC’

```
>OPENCOMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADOPEN
>MSG “The company opened successfully.”
>MOVE
ONERROR=BADMOVE
PARTIAL=TRUE
>GOTO Alldone
>LABEL BADOPEN
>MSG “The open didn’t work”
>GOTO ALLDONE
>LABEL BADMOVE
>MSG “The MOVE didn’t work”
>LABEL ALLDONE
```

viii. >MSG

1. This command issues a dialog that will be read by the user logging in. The user will have to press the ‘Ok’ button to continue. The content of the message can be anything that will fit on a single line of text. It is displayed ‘as is’. If you enclose it in quotes the quote marks will also be displayed.
2. This is a single line command. Its format is as follows:

```
>MSG <MSG TO DISPLAY>
```

3. For example:

```
>MSG THIS DISPLAYS A DIALOG BOX WITH AN OK.
>MSG “THIS DISPLAYS THE ENCLOSING QUOTE MARKS”
```

ix. >OPEN COMPANY

1. This command opens and sets the current company. Any command that logically follow this one will be working on this company.

2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. The first (DBC) is required.

1. DBC=<Fully qualified name of the company .dbc file>
2. ONERROR=<label name>

3. For example: Assume you have a company called ‘COMPANY.DBC’

```
>OPENCOMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADOPEN
>MSG “The company opened successfully.”
>GOTO Alldone
>LABEL BADOPEN
>MSG “The open didn’t work”
>LABEL ALLDONE
```

xi. >PACK

1. This command packs all of the company tables. In other words, it removes all of the items that have been deleted. (When an item is deleted in Bar|Scan, it is still present but cannot be seen.). This command has an optional DBC parameter. If specified, any command that logically follows this one will be working on the new company.

2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. Both parameters are optional.

a. DBC=<Fully qualified name of the company .dbc file>

b. ONERROR=<label name>

3. For example: Assume you have a company called 'COMPANY.DBC'

```
>PACK
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADPACK
>MSG "The company was packed successfully."
>GOTO Alldone
>LABEL BADPACK
>MSG "The PACK didn't work"
>LABEL ALLDONE
```

xii. >REINDEX

1. This command Re-Indexes all of the company tables. This command has an optional DBC parameter. If specified, any command that logically follows this one will be working on the new company.
2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. Both parameters are optional.
a. DBC=<Fully qualified name of the company .dbc file>
b. ONERROR=<label name>
3. For example: Assume you have a company called 'COMPANY.DBC'

```
>REINDEX
NDBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADREINDEX
>MSG "The company was reindexed successfully."
>GOTO Alldone
>LABEL BADREINDEX
>MSG "The REINDEX didn't work"
>LABEL ALLDONE
```

x. >REPORT

1. This command runs the specified report. Please note that the report must be setup ahead of time to behave as desired. For example, if this startup is part of an automated process, be sure that the report will not require any human interaction such as a print preview or prompted filter.
2. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. The first (NAME) is required.
    1. NAME=<Unique report name>
    2. ONERROR=<label name>
3. For example: Assume you have a report called ‘MY REPORT’. If you are running interactively the following would be ok.

```
>REPORT
NAME=MY REPORT
ONERROR=BADOPEN
>MSG “The report printed successfully.”
>GOTO Alldone
>LABEL BADOPEN
```

```
>MSG “The report had a problem”
>LABEL ALLDONE
```

xiv. >RESTRUCTURE

1. This command performs a RESTURCTURE operation on all of the company tables. This command has an optional DBC parameter. If specified, any command that logically follows this one will be working on the new company.
2. IMPORTANT: The Restructure is performed as it is when doing a Restructure from the Table Integrity screen when Verification of Tables is NOT checked. When Restructuring, it is always possible that something will come up that requires human intervention. There are several operations that require human intervention, such as when a table needs to be created. If this happens, the restructure operation will pause waiting for human interaction.
3. This is a multiline command. Each of the parameters should be on its own line. It has two possible parameters. Both parameters are optional.

a. DBC=<Fully qualified name of the company .dbc file>
b. ONERROR=<label name>

4. For example: Assume you have a company called 'COMPANY.DBC'

```
>RESTRUCTURE
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADRESTRUCTURE
>MSG "The company was restructured successfully."
>GOTO Alldone
>LABEL BADRESTRUCTURE
>MSG "The Restructure didn't work"
>LABEL ALLDONE
```

xi. >SHUTDOWN

1. This command attempts to perform an immediate logoff and shutdown. It must be understood that there are some circumstances where it will not be able to do so, for example, during a currently running operation.
2. This command is a single line command without any parameters.
3. For example, assume that an automated process is desired to be run every night. Windows can start Bar|Scan at the desired time. It might run the following startup script.

This script will open the target company, perform an import, print a report on what was imported, then exit.

```
>OPEN COMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=HADAPROBLEM
>IMPORT
NAME=MAINFRAME IMPORT
ONERROR=HADAPROBLEM
>REPORT
NAME=LIST OF ITEMS IMPORTED OVERNIGHT
ONERROR=HADAPROBLEM
>GOTO ALLDONE
>LABEL HADAPROBLEM
>MSG WARNING. OVERNIGHT PROCESS HAD A PROBLEM.
>LABEL ALLDONE
```

xvi. >VALIDATE

1. This command validates assets in the Transaction table to prepare them for movement to the Asset table.
2. This is a multiline command. Each of the parameters should be on its own line. It has one possible parameter.

a. ONERROR=<label name>

3. For example: Assume you have a company called ‘COMPANY.DBC’

```
>OPENCOMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=BADOPEN
>MSG “The company opened successfully.”
>VALIDATE
ONERROR=BADVALIDATE
>MOVE
ONERROR=BADMOVE
>GOTO Alldone
>LABEL BADOPEN
>MSG “The open didn’t work”
>GOTO ALLDONE
```

```
>LABEL BADMOVE
>MSG “The MOVE didn’t work”
>LABEL BADVALIDATE
>MSG “The VALIDATE didn’t work”
>LABEL ALLDONE
```

Samples

The following are some sample scripts. Please note that some of the parameter values may continue on to the next line, but in reality they must all be on a single line.

a. Sample #1

[ACTIONS]
This script will issue a message to all users logging in.

```
>MSG MESSAGE TO ALL USERS. DON’T FORGET TO LOGOUT BEFORE GOING HOME.
```

b. Sample #2

[ACTIONS]
This script will issue a message to the user starting Bar|Scan, force them to use a specific company, then set an inactivity timeout just in case they don’t logout at night.

```
>OPEN COMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=HADAPROBLEM
>INACTIVITYTIMEOUT
MINUTES=30
>MSG Until further notice, all users must use the COMPANY company.
>LABEL ALLDONE
```

c. Sample #3

This script will LOGIN, open the target company, perform an import print a report on what was imported, then exit. If there was a problem it will display a dialog box and sit there until someone notices it.

```
[LOGIN]
ID=MAS
PASSWORD=MASTER
[ACTIONS]
>OPEN COMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=HADAPROBLEM
>IMPORT
NAME=MAINFRAME IMPORT
ONERROR=HADAPROBLEM
>REPORT
NAME=LIST OF ITEMS IMPORTED OVERNIGHT
ONERROR=HADAPROBLEM
>GOTO ALLDONE
>LABEL HADAPROBLEM
>MSG WARNING. OVERNIGHT PROCESS HAD A PROBLEM.
>LABEL ALLDONE
```

d. Sample #4

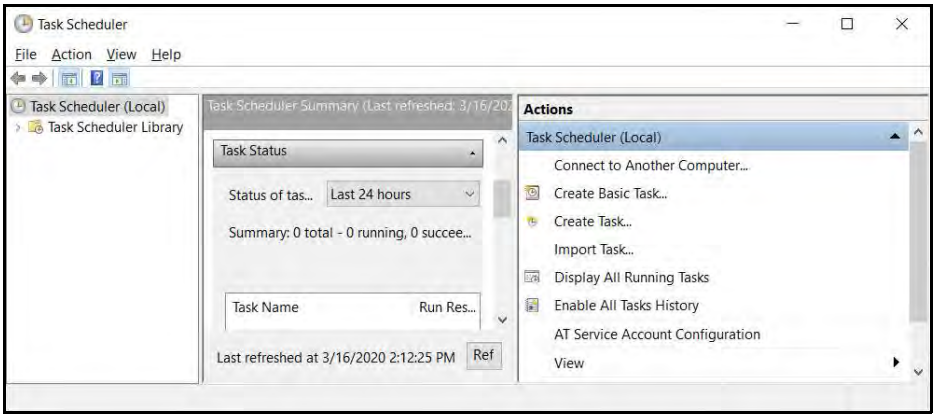
This script will LOGIN, open a company, then restructure it, pack and reindex (full Table Integrity), then logout.

```
[LOGIN]
ID=MAS
PASSWORD=MASTER
[ACTIONS]
>OPEN COMPANY
DBC=C:\BARSCANW\COMPANY\COMPANY.DBC
ONERROR=HADAPROBLEM
>RESTRUCTURE
>PACK
>REINDEX
>GOTO ALLDONE
>LABEL HADAPROBLEM
>MSG WARNING. UNABLE TO OPEN COMPANY FOR PACK, ETC.
>LABEL ALLDONE
>SHUTDOWN
```

How to Use the Task Scheduler

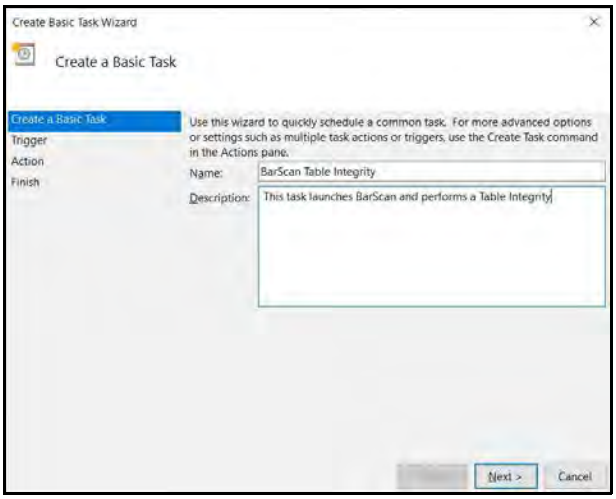
Bar|Scan Scripting is designed to work with the Windows Task scheduler to handle the timing of the startup. Note that there are two ways to use the task scheduler.

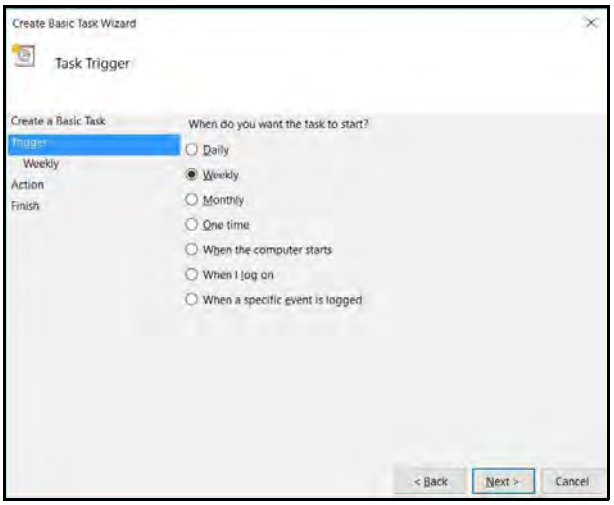
Begin by launching Tash Scheduler. The Task Scheduler desktop application should appear as shown below.

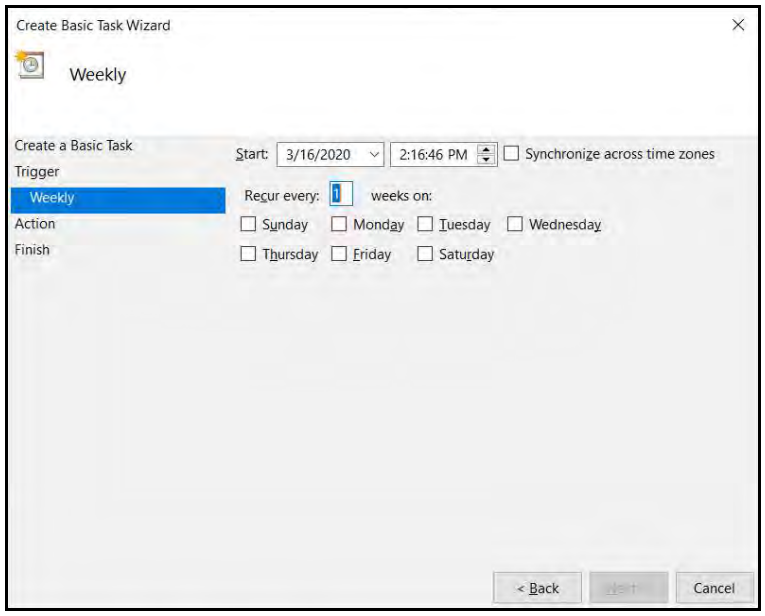


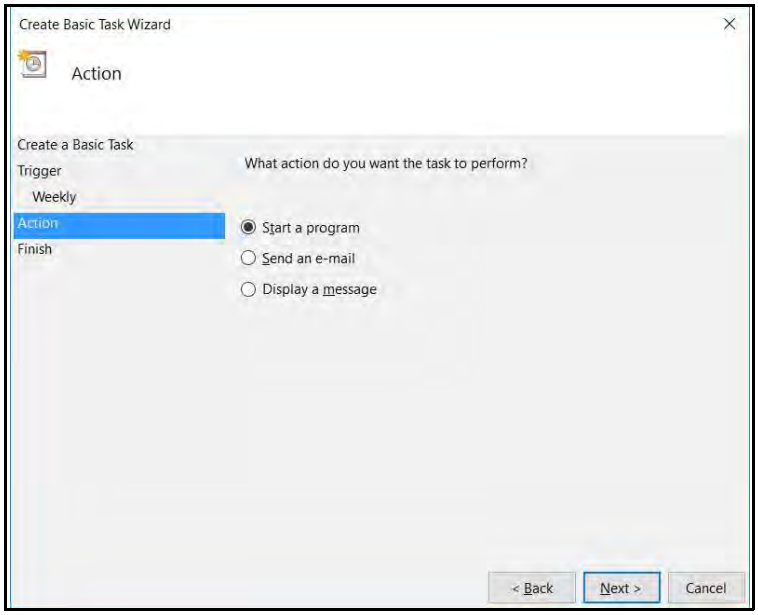
Under ‘Actions’ , select ‘Create Basic Task’. You can also use ‘Create Task’ if you want more control over the options. This will guide you through all of the field that you need to fill out. Select the ‘Next’ button when you are done with each screen.

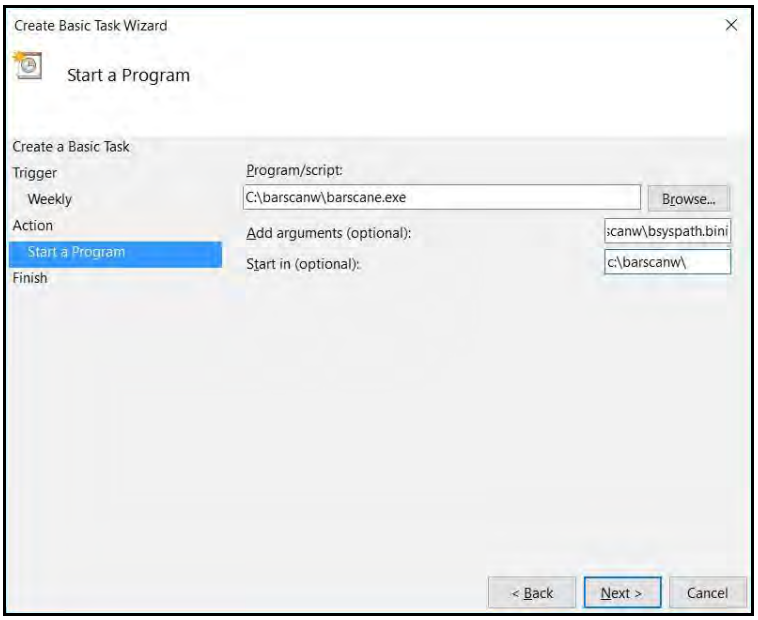
Specify the Bar|Scan program without putting in any arguments. i.e., “C:\BarScanw\BarScanw.exe” in the ‘Program/script” field, and nothing in the ‘Add arguments(optional)” field. In this case the barscanw.exe program automatically looks for the file “bsyspath.bini” in its same folder. If found, it will execute its contents. For example, the schedule panels specifying the program and arguments might look like this:






Create Basic Task Wizard
Weekly
Create a Basic Task
Trigger
Weekly
Action
Finish
Start: 3/16/2020 2:16:46 PM Synchronize across time zones
Recur every: 1 weeks on:
Sunday Monday Tuesday Wednesday
Thursday Friday Saturday
< Back
Next
Cancel


Create Basic Task Wizard
Action
Create a Basic Task
Trigger
Weekly
Action
Finish
What action do you want the task to perform?
Start a program
Send an e-mail
Display a message
< Back
Next >
Cancel



In this case the full path to the .bini file is specified, “c:\barscanw\bsyspath.bini”, in the Bar|Scan folder.

Other supported versions of Windows can do the same thing, but their entry fields vary a bit.

Note that it is important that the path for ‘Start in’ be specified and be the same path specified (without the filename) under ‘Program/script’.

You can also have multiple .bini files, all with different names. For example:

MidnightOrgImport.bini
Bsyspath.bini
NightlyReport.bini

Each of these would have to have its own startup scheduled in windows, and each of these files would perform their own expected actions.

For example, here is a script that runs a report. If the Windows Task scheduler ‘argument’ points to this file, then the report will be run whenever the scheduler says it should.

```
[LOGIN]
ID=MAS
PASSWORD=MASTER
[ACTIONS]
>Enabled=TRUE
>OPENCOMPANY
dbc=C:\BarScanw\DEMOCO\DEMOCO.DBC
>REPORT
NAME=SAMPLE ASSET DEPRECIATION SPLIT
BETWEEN ORGANIZATIONS
>GOTO ALLDONE
>LABEL ALLDONE
>SHUTDOWN
```

WORK ORDERS

INTRODUCTION

Work Order Feature

The Work Order feature provides you with a high level of control over your list of assets. Work Orders generated by Bar|Scan, in conjunction with the Mobile Device, allow you to control both the movement of your assets as well as their cost, repair, and scheduled pick-up or delivery.

The Work Order feature allows you to place orders for various assets either specifically, by asset number, or generally, by catalog. Each Work Order has a unique number, the name and telephone number of the person requesting the order, crew assigned the task, the division, department and unit to charge, deliver to location, and notes/instructions regarding the order.

As the Work Order is filled, each asset is then scanned with its related Work Order number by the Mobile Device. When this information is synchronized with the Bar|Scan desktop and the assets are moved to the Asset table, Work Order status is updated. If all items on the Work Order are completed, the Work Order status is set to *completed*. The Work Order status will also identify what portion, if any, is still incomplete.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

The Work Order feature of Bar|Scan provides you with the ability to enter new Work Orders, view selected Work Orders or groups of Work Orders, change existing information on a Work Order, and remove a Work Order.

You can also use the Work Order Templates Panel to create recurring Work Orders such as monthly scheduled work.

Component Feature

Optionally, you can use a set of features to allow you to create, modify and move groups of assets by selecting them using both a Catalog Component List or an Asset Bill of Materials (BOM) List.

With these features, you can move these groups as a whole, perform work on these groups by means of a Work Order, reserve the components of these groups by means of a Reserved Bill Of Material so that they will not be available for use to build other groups or be moved to other locations.

You can also create Bar|Scan reports detailing these special catalogs, assets, and components and their relationship.

Catalog Components, Asset Bill of Materials, Reserved Bill Of Materials and Reporting are all discussed in more detail in the following sections.

Important: In order to get maximum utilization from the Work Order feature, you must tag your assets and build your asset file prior to implementation of Work Orders. It would be difficult to receive and process orders for assets if they were not yet in your asset table. The original entry of new assets into the system is usually accomplished using the Mobile Device.

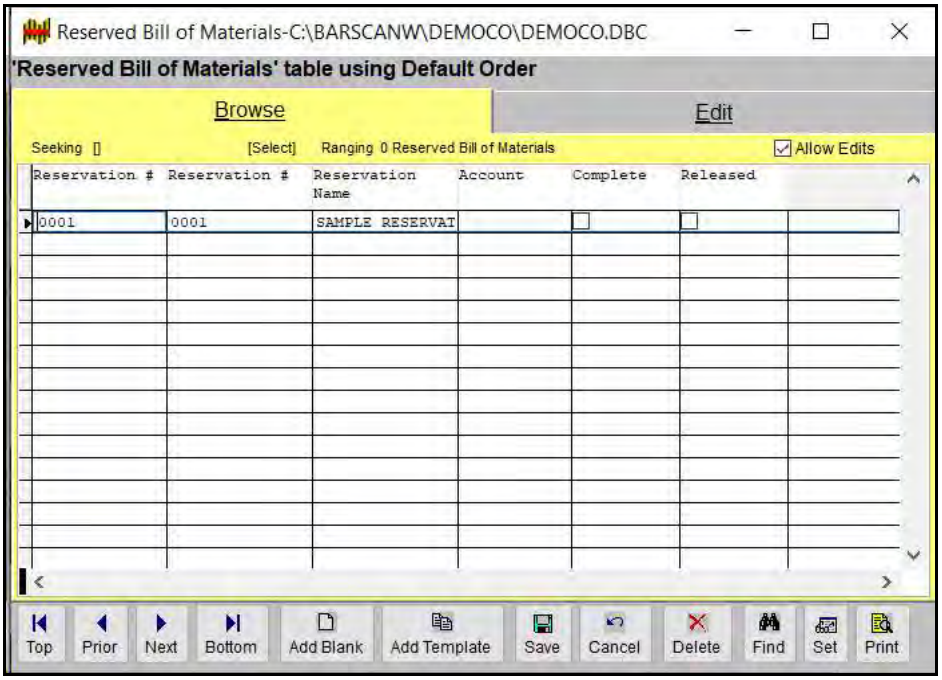
RESERVED BILL OF MATERIALS

The Reserved Bill of Materials is optional. A Work Order does not require the use of the Reserved Bill of Materials.

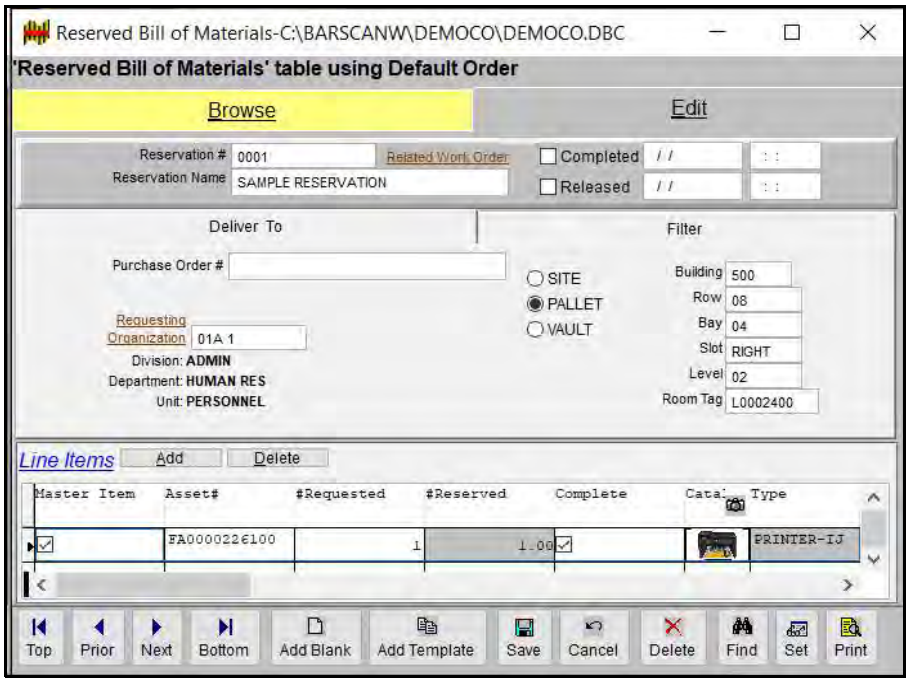
The Reserved Bill Of Material is used so that assets will not be available for use to build other groups or be moved to other locations.

When you want to view, change, add, or delete Reserved Bill of Materials you will need to open the Reserved Bill of Materials table. From the Main Menu, select File, then Open ...▸, then Work Orders...▸, then Reserved Bill of Materials.

You are now presented with the Reserved Bill of Materials Screen similar to the one below.



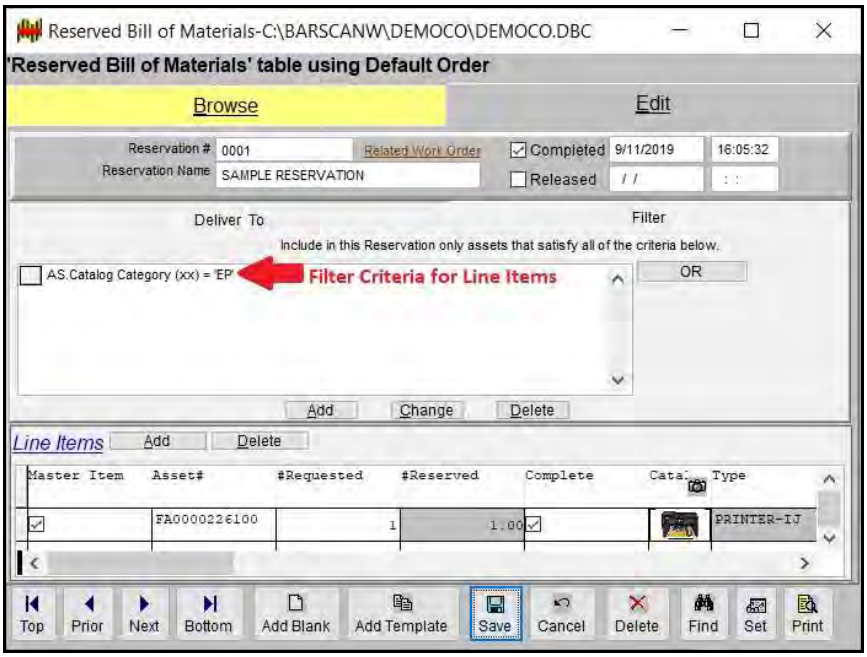
When you want to see the detailed information that has been entered into the Reserved Bill of Materials table, you will need to select the Edit tab. When you do, you will be shown a screen similar to the one below.



There is a fixed area at the top, two tabs as well as an area for Line Items.

The Reservation Number is not auto generated, you must enter this number. The Reserved Bill of Materials cannot be saved without a number. The Completed and Released items are auto generated.

The Filter Tab is very important. It contains the criteria that Bar|Scan must follow when selecting the assets to fulfill the reservations. In the above example, only assets currently located in Building 500 can be used to fulfill the Reservation. In other words, if your warehouse is designated as '500', only items in your warehouse can be reserved. This is shown in the example below.



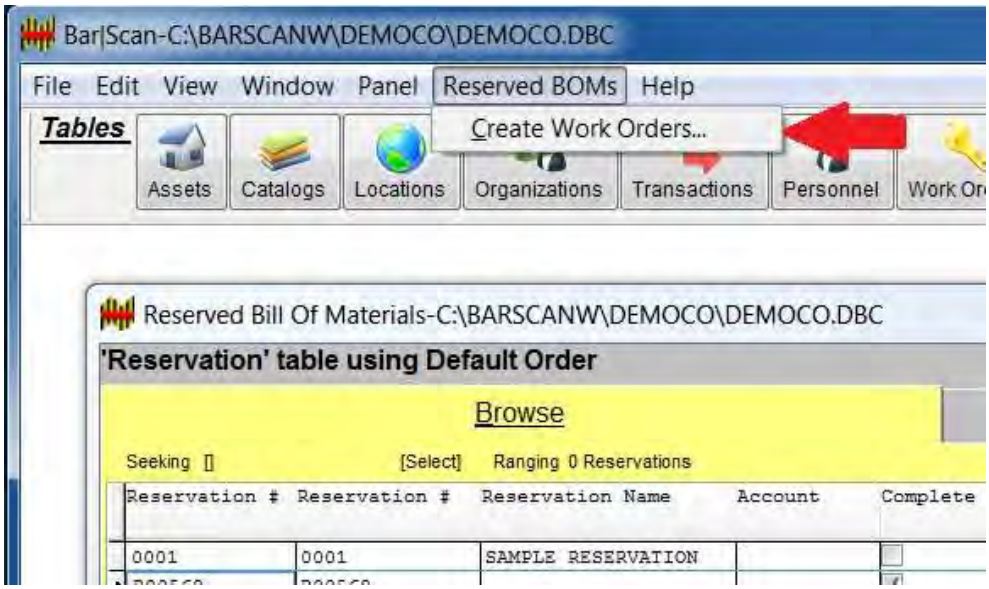
Items are Assets or Quantity items from your Asset Table. They can be entered individually. If you Add an Asset that has Asset Components, these will automatically be entered when you add the Asset. A column titled 'Master Item' identifies whether the added Asset was entered individually or because it was added automatically as an Asset Component.

Line Item available for selection can be filtered as in the example above. Filters can be any criteria, e.g. only items in your warehouse location such as Building = 'WHSE'.

Asset Components cannot be deleted from the Line Items list. Only assets with the Master Item check mark can be deleted. You cannot delete a component asset. When a Master Item is deleted then all of its components will also be deleted.

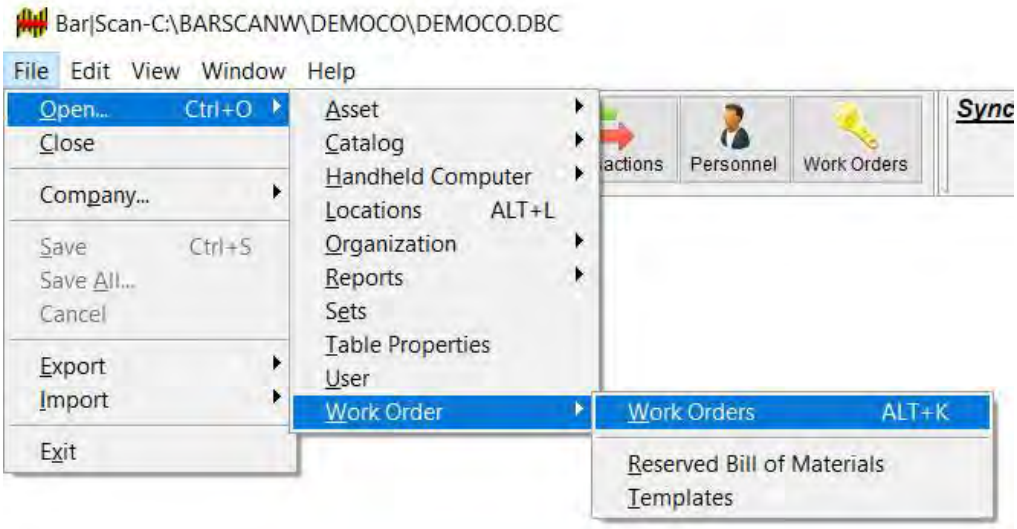
When you have created a Reserved Bill of Materials, you can have a Work Order automatically created for your assets so that they may be pulled, shipped or moved as a group. To begin this process, you must Range the appropriate Reservation Numbers. Keep in mind that by resorting the Browse Panel columns using the Set Command, you quickly select a large Range.

When the Reserved Bill of Materials Table is open, a new item will appear between the Panel and the Help Features on the Main Menu as shown below.



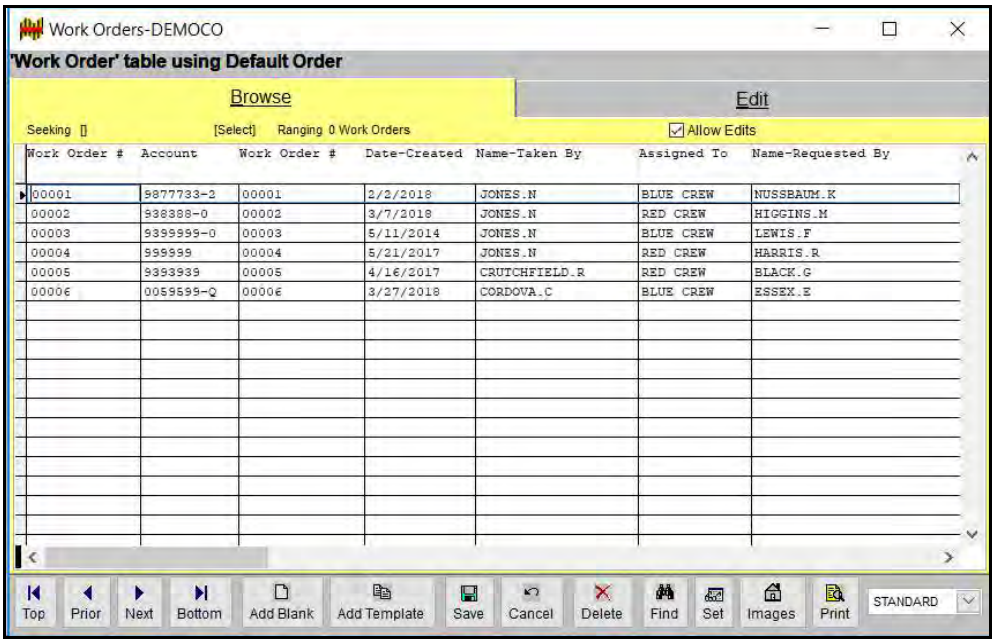
PROCESSING WORK ORDERS

When you want to access the Work Order feature, simply go to the Main Menu, and select File ...▸, Open ...▸, Work Orders as shown below.



Or, if you have selected the table icons to appear on your Main Menu, you can simply click on the Work Order table icon which is shown below.

When you select Work Orders from the Main Menu, a Browse panel similar to the following appears.

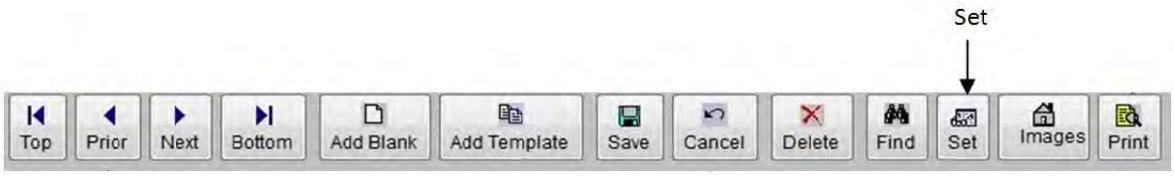


When the Work Order table is first opened, you will not have any Work Orders listed, but you can add your first one by selecting the Add Blank button from the tool bar.

We have entered several Work Orders as examples. Once you have at least one Work Order entered into your Bar|Scan system, you can add more Work Orders by selecting the Add Template button from the tool bar.

THE SET BUTTON

On the Work Order table, the Browse panel is selected by default. The Work Order information on the Browse panel can be sorted by any field. Place your cursor in the first column on the left, and then press your right mouse button, and select the Order By that will pop-up, or select the Set button on the tool bar as shown below.



This feature will give you the ability to look at all of the Work Orders, pre sorted the way you specify. If you do not specify another sort, the default sort is by Work Order number.

CREATING AN ORDER AND FILTER

The SET feature allows you to order and identify a smaller, more manageable group of Work Orders from which to select, e.g., only those Work Orders that are not closed, or sort them by Work Order number, etc.

As the number of Work Orders on your system increases, it becomes more time consuming to look through the entire list on a look up window.

SET permits you to "order" your Work Orders by any item in the table. This makes it easier to find information on the Work Orders.

Because SET offers almost endless possibilities for identifying groups of Work Orders, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any Work Order. It merely specifies the sequence of Work Order selection lists.

When you want to view your Work Orders sorted by any field other than the default, select the Set button from the tool bar.

This button activates the Set feature, and the following screen will appear.

This Set Order and Filter tab, shows a list of Sets that are pre defined in the Bar|Scan system. You can, however, define additional Sets. Simply click on the Add/Change/Delete button shown above, and the Sets table will open.

SET permits you to define a "filter" which will reject the Work Orders which do not meet your specifications.

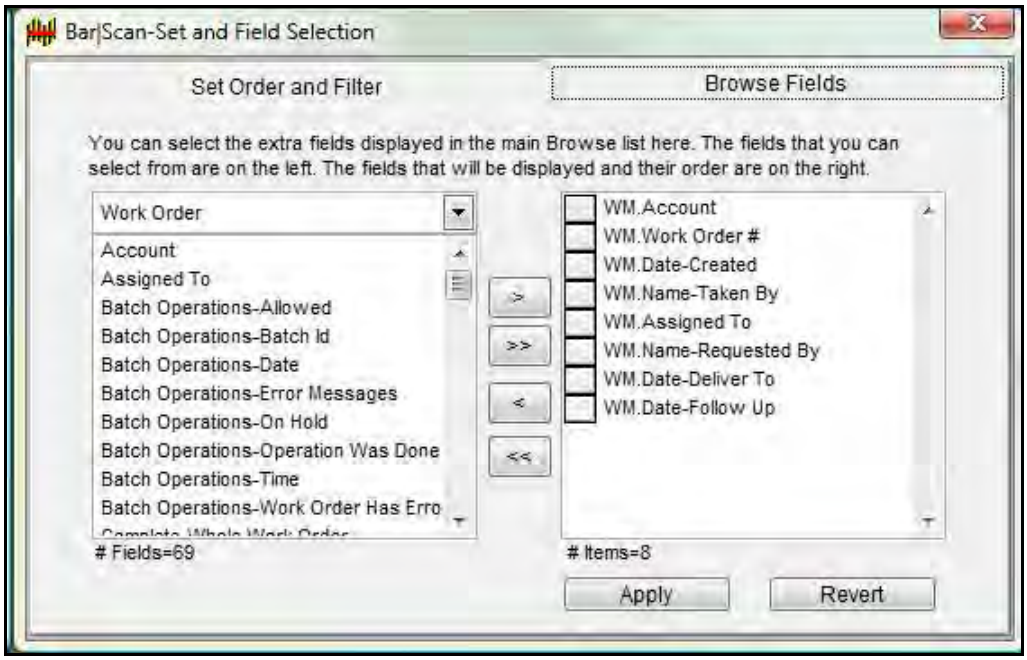
Further, you can define a "range" for a filter item by selecting and marking a block when you are presented the list.

Finally, you can identify more than one filter and/or range to further reduce the number of Work Orders to search.

Because SET offers almost endless possibilities for identifying groups of Work Orders, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any Work Order. It merely specifies the amount and the sequence of Work Order selection lists.

However, if you would like to browse the fields that are available for the predefined Sets, add a field, or remove a field, select the Browse Fields tab.

When you select the Browse Fields tab, you will be shown the following screen.

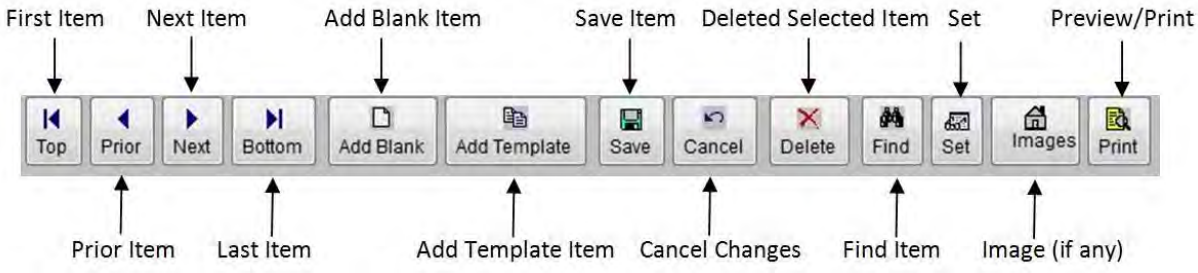


On the left side of this screen there is a list of all of the available fields for the Work Order table that you may display on your browse tab. On the right side of this Browse Fields tab, you will see the current fields that are displayed for each Set. These fields are displayed for all of the different Sets, with the Set pertaining to only the column by which the list is sorted. Respectively, each individual Set can have a filter set up to filter out items that you do not wish to see.

The Set feature is a powerful tool, and should be experimented with. Notice that the items that are chosen to be displayed from the right side of the above screen can be moved to any order you desire while being displayed.

WORKING WITH WORK ORDERS

The tool bar at the bottom of the Work Order table is displayed below.



You may press the PgDn key, or the Next Item button to view the next Work Order from the selection list. The PgUp key or the Prior Item button will display the previous Work Order. Ctrl + Home key combination or the First Item button will display the first Work Order on the selection list, and the Ctrl + End key combination or the Last Item button will display the last.

You may use any of the following: Add Blank, Add Template, Delete the Selected Item, Save Selected Items, and the Cancel Changes on the Edit tab.

Shopping Screen

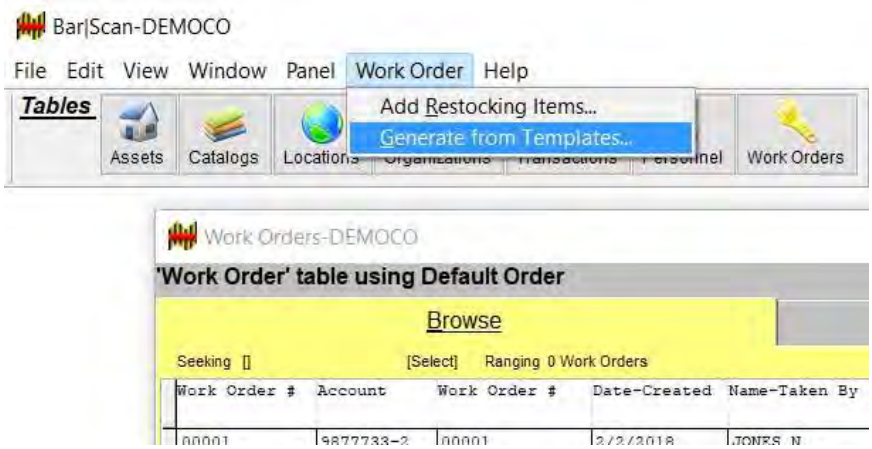
The last item shown on the Work Order table tool bar says Shopping, and has a down arrow next to it. It is displayed below.

For most of our customers, this item can remain at the default. But, by pressing the down arrow, you will see the words Shopping. This item is used mainly by retail or warehouse check-out areas. We will cover the Shopping Screen in more detail later in this Chapter.

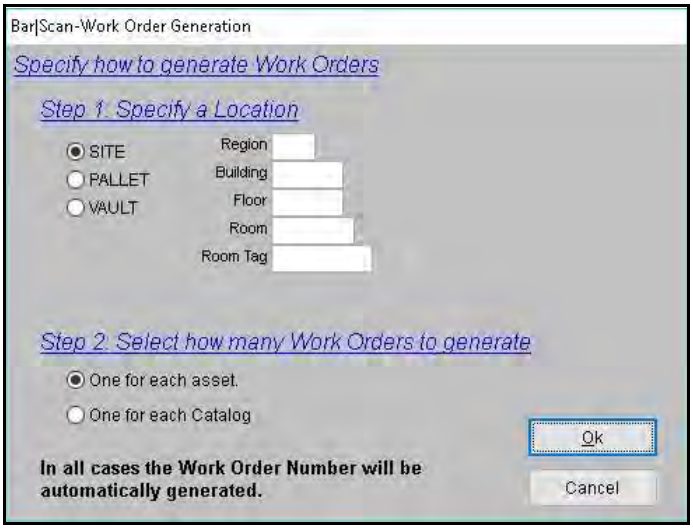
ENTERING A NEW WORK ORDER

You may need to add Work Orders to your Bar|Scan system on an ongoing basis. In order to add a Work Order, you may select the Add Blank Item or the Add Template Item button from the tool bar.

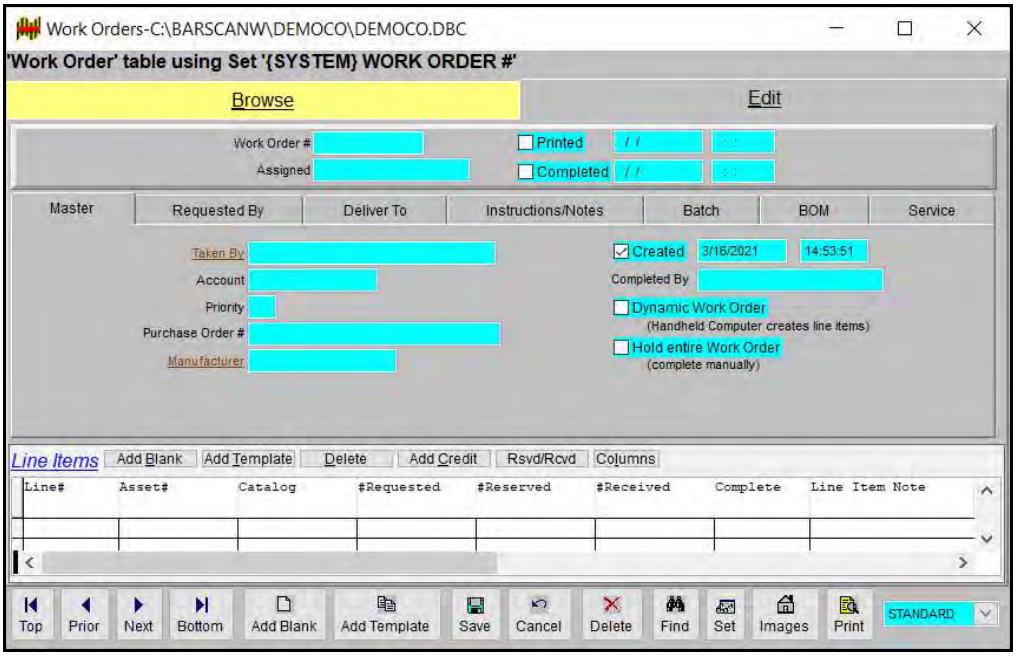
If you are using the Work Order Templates, then you can also Generate a Work Order from a Template as shown below.



If you generate from a template, you will see the following dialog:



What is the difference between Add Blank Item, and Add Template Item? You need to select Add Blank, for your first Work Order entry, as you will not have any Work Orders to use for a template. If you choose Add Blank Item, and then select the Edit panel, you will be shown the Work Order panel and with no information displayed in any of the entry fields except for the Created Date as shown below.



Adding from a template Work Order is a time saver. Often you can choose a Work Order of a like item for your template, and only have to change the information that is different for your new item.

If on the Browse panel, move through the list of Work Orders until you find the Work Order that you wish to use for a Template. When the desired Work Order is found, move the highlight bar over it and press ENTER or click on the Work Order with your mouse. Select the Add Template Item, and then select the Edit tab.

You will see all of the information that has been entered for this Work Order. Simply change all of the fields to match the information for your new Work Order, and Save the new Work Order.

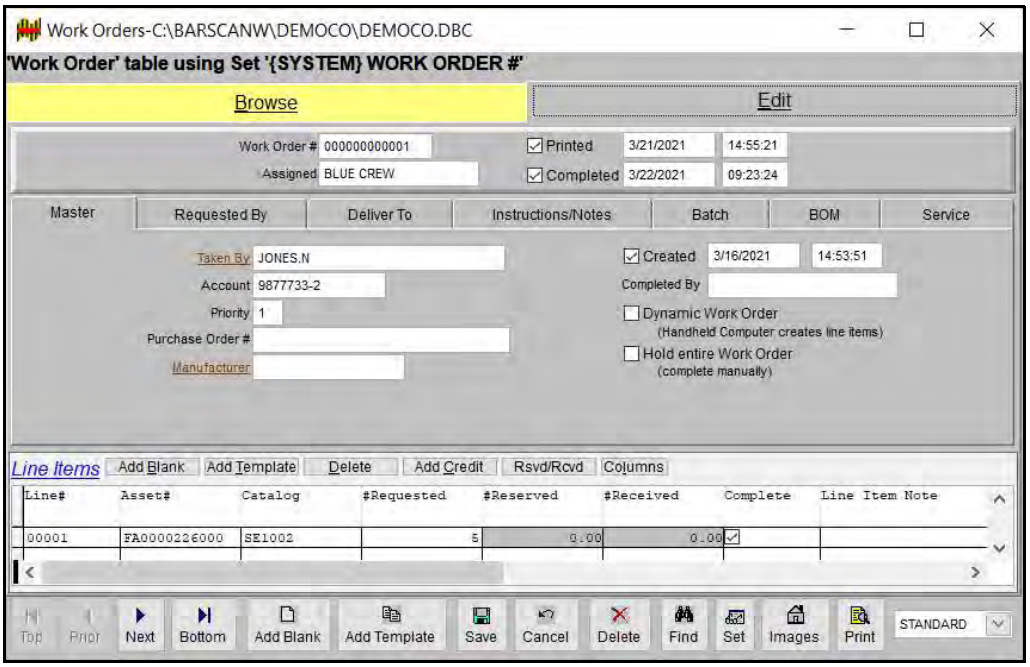
You may choose Add Blank Item or Add Template Item from the Edit Screen without returning to the Browse screen.

You may use the arrow keys, the TAB key, the mouse, or the ENTER key to move to the different items on the screen. The PgUp and PgDn keys, as well as the Previous Item and Next Item buttons, will display information from the previous or next Work Orders respectively.

The Work Order is where individual asset requests are entered. You can enter an unlimited number of individual asset requests on each Work Order. You can also produce a Work Order without asset requests.

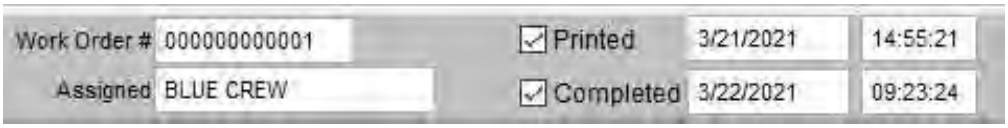
Many of the entry items have associated look up windows to assist you with your entry. The following section will describe each item on the Work Order Edit panel and the associated look up windows.

When we have selected a Work Order from the Browse panel, and clicked on the Edit tab, you will see the following panel.



The Edit tab has six tabs of its own. The first of these five tabs, the Master tab, opens as the default, and is displayed above.

The top of the panel and the line items are separate from the tabs, and will be shown no matter which of the three tabs you choose. The top of the Edit tab is shown below.



Work Order Number

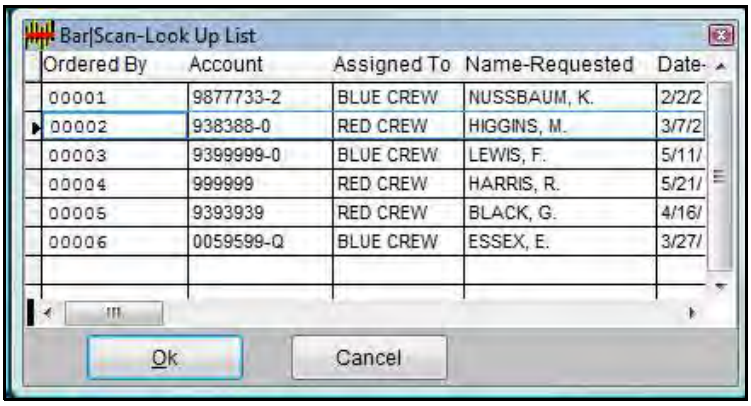
A unique Work Order Number is required for each Work Order entered into the Bar|Scan system.

The number is automatically generated when you save the Work Order. Alternatively, you can enter your own Work Order number. In most cases it is easier to let Bar|Scan generate the Work Order number for you.

The Work Order number can be printed in bar code form on your Work Order report for scanning with the Mobile Device.

After you have selected a similar Work Order for display, the cursor will be positioned for you to enter the new Work Order number.

When you right click with your mouse on the Work Order number field or press F5, select Look up Value, and a Look up List similar to the one below will appear.



Bar|Scan is designed to monitor the new Work Order number as you enter it to make sure you do not duplicate an existing number. Most often, you will be entering a Work Order number which is similar to an existing number. This is because most new Work Order numbers are assigned sequentially, i.e., the next Work Order number assigned will differ only in the last one or two digits.

By default, Bar|Scan will set the Work Order Number to be the same number of digits as your asset number.

Assigned

This is to whom the Work Order is assigned to. Normally this is the crew, team, or individual who will actually perform the tasks entered on the Work Order. Since it is an optional item, it can also be left blank.

Enter Assigned by moving the cursor to the entry, type in the characters and press the TAB key.

Printed

These items identify when the Work Order was printed. It consists of three parts, Printed Yes or No, the date printed, and the time printed.

In most cases, you will not want to enter information here unless you wish to reprint the Work Order, and even then, only if you are using printed as a filter on your report.

When you print a new Work Order, Bar|Scan automatically enters these fields. Printed is set to Yes and the date and time are taken from the date and time of your computer. These can, however, be manually changed by you.

If you wish to change these items, move the cursor to the entry, type in the characters and press the TAB key.

Completed

These items identify when the Work Order was completed. It consists of three parts, Completed Yes or No, the date completed, and the time completed.

In most cases, you will not want to enter information here unless you wish to change the Work Order.

When you synchronize the Mobile Device, validate the Transaction Table and move the assets to the Asset Table, Bar|Scan then completes each line item (discussed later) if the assets were properly scanned. The Work Order is changed to Completed when all of the line items on the Work Order are set to Completed. Completed is set to Yes and the date and time are taken from the date and time of

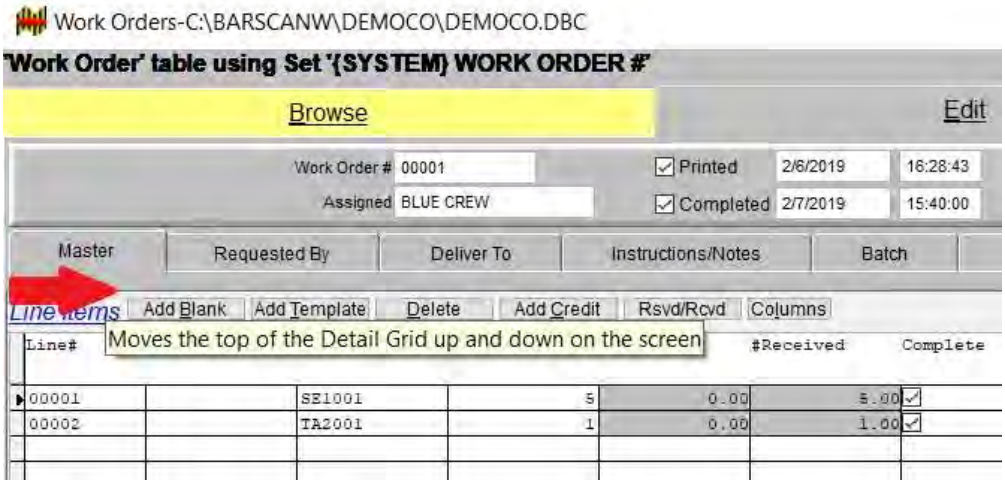
your computer when the last line item is completed. Completed can, however, be manually changed by you. For example, you will want to change the Work Order to not completed if you wish to reprint the Work Order after the Mobile Device synchronization.

If you wish to change these items, move the cursor to the entry, type the characters and press the TAB key.

Line Items Screen Size

The Edit Screen has three areas, the Top Panel, the Tab Area, and the Line Items. The line items area can be adjusted to suit your requirements by placing your mouse on the line between the Tab Area and the Line Items. You can then move the Line Items area up or down while holding your mouse button down.

If you typically enter many line items for each Work Order, you might find it useful to increase the area for your work. Below is an example of moving the Line Items area up to display a larger area for data entry.



THE MASTER TAB

Taken By

This item identifies a person or group that documented, "took" the Work Order request or call, and entered the Work Order information into Bar|Scan. Since it is an optional item, it can be left blank.

Enter Taken By, by moving the cursor to the entry, typing the characters and pressing the TAB key.

Account

Your company may control work through the use of billing or customer account numbers. If the Work Order is to be charged to an account number, you can add it here.

Remember that there is only one account number for each Work Order. If the Work Order has several line items that may be charged to more than one account, you may wish to create more than one Work Order. Since it is an optional item, it can also be left blank.

Enter Account by moving the cursor to the entry, type in the characters and press the TAB key.

Priority

This is the relative priority or importance of performing the tasks on the Work Order. Normally a letter or numbering scheme is used. For example, an 'A' priority could mean that the Work Order needs to be done immediately, a 'B' could mean that the Work Order needs to be done in no more than four hours, etc. Since it is an optional item, it can also be left blank.

Enter Priority by moving the cursor to the entry, type in the characters and press the TAB key.

Purchase Order Number

This item identifies a Purchase Order associated with the Work Order request. Since it is an optional item, it can be left blank.

Enter a Purchase Order by moving the cursor to the entry, typing the characters and pressing the TAB key.

Manufacturer

This item identifies a Manufacturer associated with the Work Order request. Do not use this field if the Work Order contains many line items associated with different manufacturers. You can also click on the Manufacturer hyper-link to open the Manufacturer Table for reference. Since it is an optional item, it can be left blank.

Enter the Manufacturer, by moving the cursor to the entry, typing the characters, or selecting a Look-up and pressing the TAB key.

Created

These items identify when the Work Order was created. It consists of three parts, Created Yes or No, the date created, and the time created.

When you create a new Work Order, Bar|Scan automatically enters these fields. Created is set to Yes and the date and time are taken from the date and time of your computer. These can, however, be manually changed by you.

If you wish to change these items, move the cursor to the entry, type in the characters and press the TAB key.

Completed By

This is also an optional field, but can be used to keep track of who actually completed the work for each Work Order.

Dynamic Work Order

You may not know in advance which assets (or catalogs) will be required to fill the Work Order. In this case, you can click on the Dynamic Work Order box and leave the line items blank. Any assets scanned in the Mobile Device with the corresponding Work Order number that is a Dynamic Work Order will be placed into the line item fields when they are uploaded. Normally, the line items are considered complete after one Mobile Device is uploaded. This can also be changed (see Hold Entire Work Order below). Dynamic Work Orders can be very useful both in Standard and Shopping mode. You can also "mix and match", that is you can add line items in advance as well as use the Dynamic Work Order box.

Hold Entire Work Order

You may wish to keep a Work Order from being completed even though all the line items have been completed. For example, in the Dynamic Work Order example above, you may need to synchronize a second Mobile Device. Click on the Hold Entire Work Order box to do this.

The bottom of the Edit panel displays the line items, and their details.

Line Items

Each Line Item refers to one or more assets requiring action. These assets are scanned with the Mobile Device. The Work Order Number prompt in the Mobile Device is used to record the Work Order Number associated with each Asset and must be turned on. For more information in the Work Order Number Prompt in the Mobile Device, refer to *Chapter 11 - Bar|Scan Mobile*.

Work Orders are normally completed when assets scanned with the Mobile Device are synchronized and successfully moved from the Transaction Table to the Asset Table. Work Orders are not affected simply by synchronizing the Mobile Device.

Inserting and Deleting Line Items

When you select the Edit tab, the Work Order line items will be displayed. There is no limit to the number of line items that can be added to a Work Order. Line items can be a combination of different assets or catalogs.

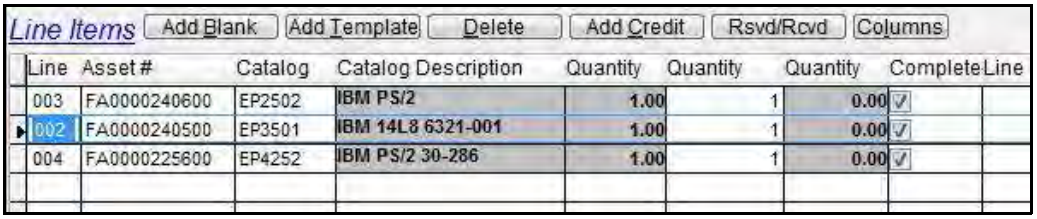
To add new line items, press the Add Blank or the Add Template button. The system will automatically supply a line number. There are two basic types of line items which can be entered -- a quantity of items by catalog, or a specific asset by asset number.

You could create line items by catalog if you were not concerned about specific assets, but rather, only that the correct type of asset was moved or delivered.

As the Work Order is filled, each asset is scanned with its related Work Order Number using the Mobile Device. When this information is uploaded to Bar|Scan and moved from the Transaction table to the Asset table, it automatically updates the Work Order Line Items Display Screen identifying what portion, if any, is still incomplete.

To delete a line item, place your cursor on the line item, and select the delete button.

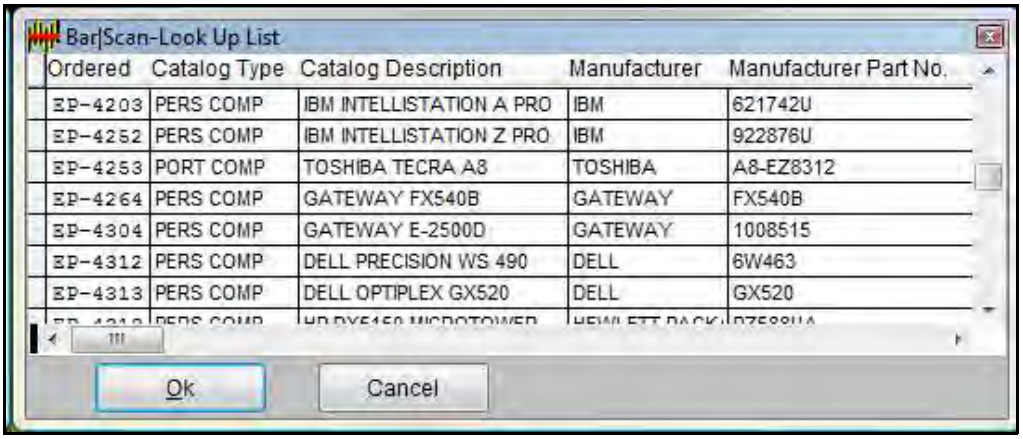
When items are requested by quantity and catalog number, the system compares the asset scanned to the line items by catalog number to determine which line item to update. The system then checks whether the current location matches the deliver to location on the Master Work Order panel. If it matches, the system increases the Quantity Received total by 1 and if the Quantity Received matches the Quantity Requested, it updates the line item as Complete as shown below.



Line	Asset #	Catalog	Catalog Description	Quantity	Quantity	Quantity	Complete	Line
003	FA0000240600	EP2502	IBM PS/2	1.00	1	0.00	☑	
002	FA0000240500	EP3501	IBM 14L8 6321-001	1.00	1	0.00	☑	
004	FA0000225600	EP4252	IBM PS/2 30-286	1.00	1	0.00	☑	

Important: Even though we have the option of selecting assets by quantity, this is different from configuring the Mobile Device to use the Quantity Prompt. **Do not configure the Mobile Device for Quantity** in order to use this feature.

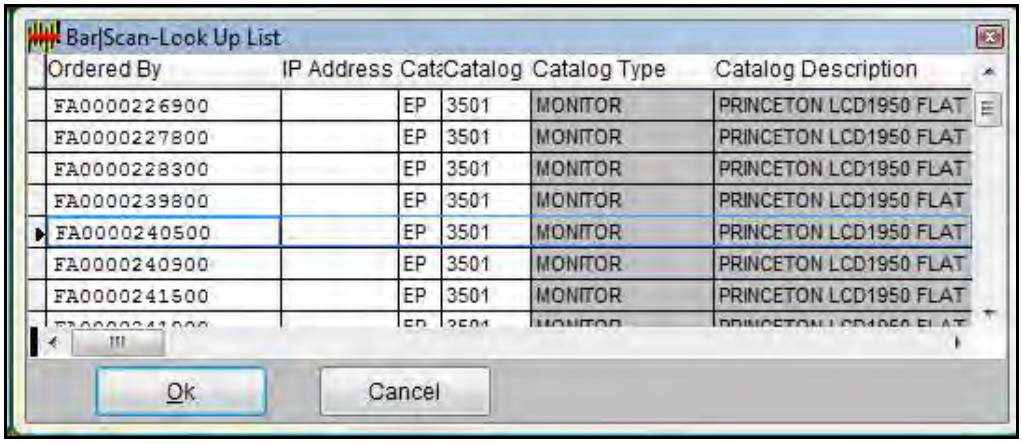
When you are completing the Work Order line items by Catalog, you have the ability to access the Catalog table information by placing your cursor on the Catalog field, and then right clicking and selecting Look Up Value. You will see a Look up Window similar to the one below.



Ordered	Catalog Type	Catalog Description	Manufacturer	Manufacturer Part No.
EP-4203	PERS COMP	IBM INTELLISTATION A PRO	IBM	621742U
EP-4252	PERS COMP	IBM INTELLISTATION Z PRO	IBM	922876U
EP-4253	PORT COMP	TOSHIBA TECRA A8	TOSHIBA	A8-EZ8312
EP-4264	PERS COMP	GATEWAY FX540B	GATEWAY	FX540B
EP-4304	PERS COMP	GATEWAY E-2500D	GATEWAY	1008515
EP-4312	PERS COMP	DELL PRECISION WS 490	DELL	6W463
EP-4313	PERS COMP	DELL OPTIPLEX GX520	DELL	GX520

You have the ability to look for and select a catalog from this Look up Window.

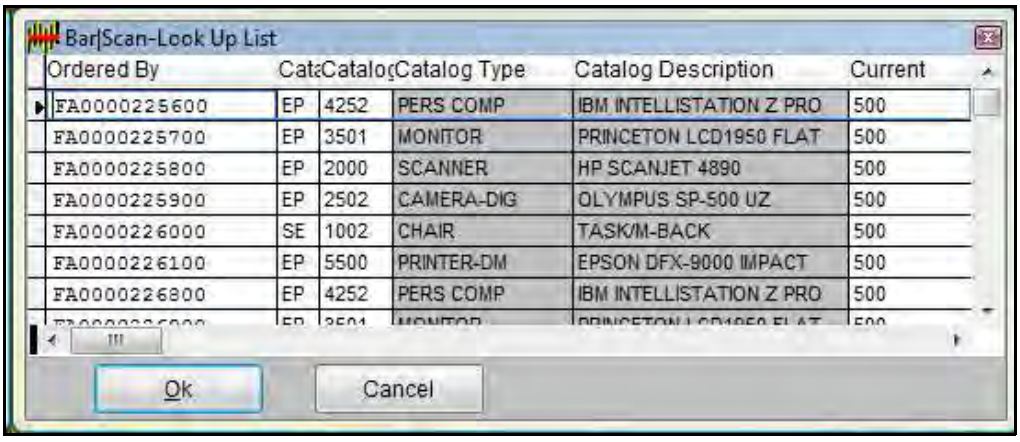
When you have selected a Catalog, you can then go to the Asset number column, and right click on that field. You will see a list of assets that are the same Catalog as the one you selected in the Catalog column.



This can be extremely helpful, as you can use the scroll bars to view the rest of the information about these assets, such as where they are located, if not already displayed.

Remember, if the columns that you need to see in the look up window are not displayed, you can scroll to find them, and then move them as was done in the above look up in order for the location columns to show. To move a column, click on the highlighted title for each column. When the cursor turns to a black downward arrow, continue to hold the mouse button down, and drag the column to the right or left.

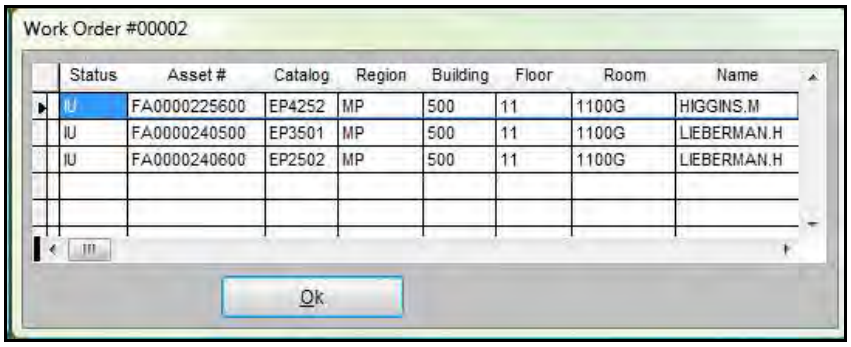
Line items can be ordered by Asset number alone, without filling out the Catalog information. When this method is chosen, you still have the ability to right click on the Asset number column. However, the list of assets that will be shown includes all of the Assets, not just those using a specific Catalog, as shown below.



When items are requested by specific asset number, the system compares the current location of the asset to the deliver to location on the Master Work Order Screen. If they match, the system increases the Quantity Received to 1 and updates the line item as complete. If the location does not match, it increases the Quantity Reserved to 1 and the line item remains incomplete.

Once Work Orders have been scanned with a Work Order Number and the Mobile Device uploaded, their current status, Asset Number, Catalog Number and Location can be viewed by clicking your mouse on the Reserved/Received Assets button on the Master Work Order tab.

You will see a Look up Window similar to the one below.



The actual assets scanned by the Mobile Device to complete the Work Order will be uploaded to the Transaction table, moved to the Asset table, and then the Work Order line items will display that the line item is complete.

Add Credit Button

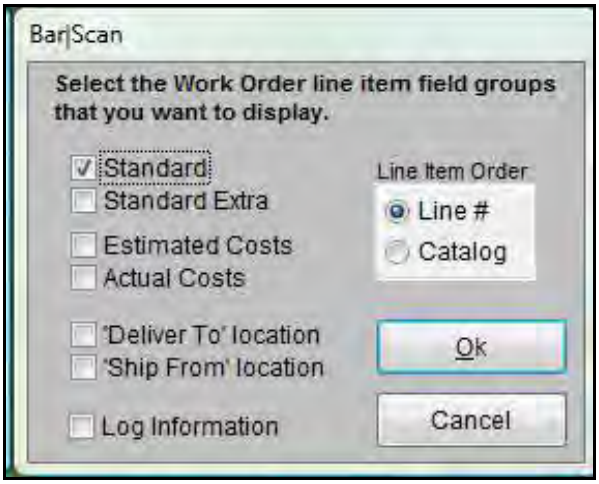
There may be cases where Work Order line items need to be changed or adjusted and the Work Order has already been issued (printed). For example, a quantity of 5 items was entered erroneously instead of 3 items. You can use the Add Credit Button to make a new line item with a -2 items (negative two).

Obviously, you can also just adjust the original line item by changing the 5 to a 3, but there would be no audit trail, or history, that this change was made. Additionally, there may be a cost associated with a credit (or customer return), which you would want to record.

The credit is applied to the line item which you click on. It is not applied to the last line item. For example, lets say that you have 6 line items in your Work Order and the credit needs to be applied to the 3rd line item. Click on the 3rd line item and press the Add Credit button. A new line item is added as a credit with the description, cost, and other associated information from the 3rd item.

Columns Button

You can make a wide variety of customization to what fields are displayed for each Line Item by clicking on the Columns button. When you click on the Columns button, the following Window will be displayed.



Clicking Standard will display the following fields.

- Line Number
- Asset Number
- Catalog Number
- Catalog Description
- Quantity Received
- Quantity Requested
- Quantity Reserved
- Completed
- Line Item Note

Clicking on Standard Extra will display the following additional fields.

- Activity Date
- Activity Time

Clicking on Estimated Costs will display the following fields. They can be manually completed either before the Work Order is issued, or after the Work Order is completed by the Mobile Device operator.

Quantity Requested
Charge per Unit
Labor Rate per Hour
Hours Estimated
Supplies Cost - Estimated
Labor Cost - Estimated
Total Cost - Estimated
Line Item Note

Clicking on Actual Costs will display the following fields.

Quantity Requested
Charge per Unit
Labor Rate per Hour
Hours Actual
Supplies Cost - Actual
Labor Cost - Actual
Total Cost - Actual
Line Item Note

Clicking on 'Deliver To' Location can be used when one Work Order has multiple delivery locations. If you use this option, consider leaving the Deliver To Tab blank. The following fields will be displayed.

Deliver to Region
Deliver to Building
Deliver to Floor
Deliver to Room
Deliver to Vault
Deliver to Row
Deliver to Bay
Deliver to Slot
Deliver to Level
Deliver to Room Tag
Deliver to Location Type

Clicking on 'Ship From' Location can be used when one Work Order has multiple Pick up locations. If you use this option, consider leaving the location information on the Requested By Tab blank. The following fields will be displayed.

Ship From Region
Ship From Building
Ship From Floor
Ship From Room
Ship From Vault
Ship From Row
Ship From Bay
Ship From Slot
Ship From Level
Ship From Room Tag
Ship From Location Type

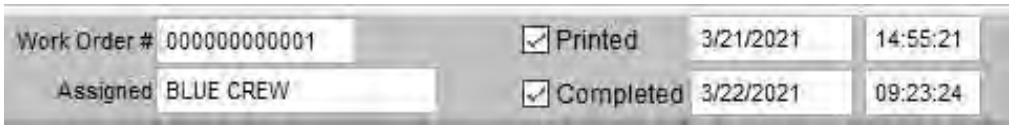
Clicking on 'Log information' can be used when Work Orders have multiple changes and you would like to view when the line items were last updated. If you use this option, make sure that every user has a different password. The Log Event Codes are documented in *Chapter 14 - Import & Export*. The following fields will be displayed.

Log Date When First Added
Log Time When First Added
Log User When First Added
Log Notes
Log Alias
Log Event Code

For all of the columns mentioned above, keep in mind that you can customize your screen display by resizing each field and reordering the fields by dragging the column header. Your changes will be memorized for your password and will remain in place every time you access Bar|Scan.

Once all line items are complete, Bar|Scan will update the Master Work Order tab "Completed" item at the top of the panel by changing it to having a checkmark.

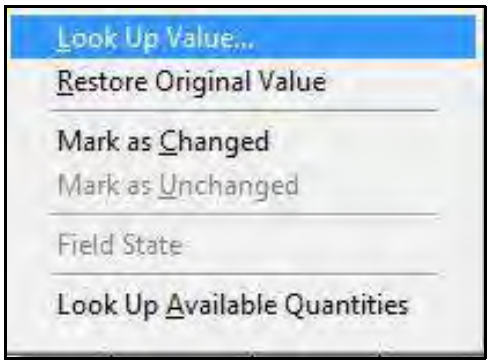
Bar|Scan will also allow you to identify which Work Orders have been printed -- see "Printed" field as shown below.



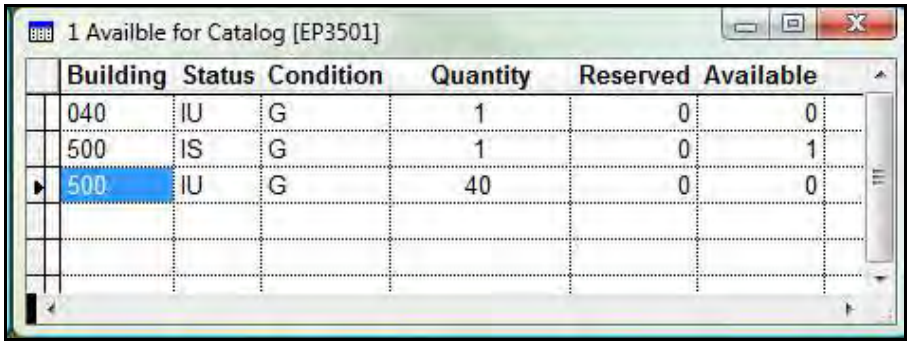
You may wish to consider deleting completed Work Orders after some determined time has passed, for example one year. Remember, you can order Work Orders by completion date using the SET command. This will make it easy to use the Delete feature to remove old Work Orders.

Look Up Available Quantities

It is often useful to know what you have available when you are adding line items. For this reason, there is a special function that can assist you in obtaining this information. When you right click on the Quantity Requested, you will be presented with the following Pop-up.



When you select Look Up Available Quantities, you will be presented with a Window like the one below.

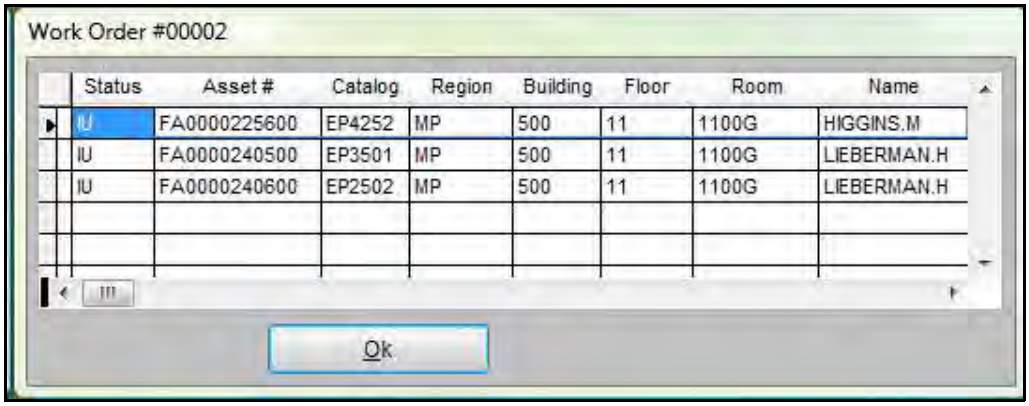


Building	Status	Condition	Quantity	Reserved	Available
040	IU	G	1	0	0
500	IS	G	1	0	1
500	IU	G	40	0	0

This Window shows the quantity of assets that are located in each Building Location in the Asset Table. The information can be very useful, for example, It can prevent you from creating a Work Order requesting more items than you can ship.

Reserved Received Items

In the middle of the Master panel, there is a Reserved/Received button. When you select this button, you will see a Look up Window like the one below.

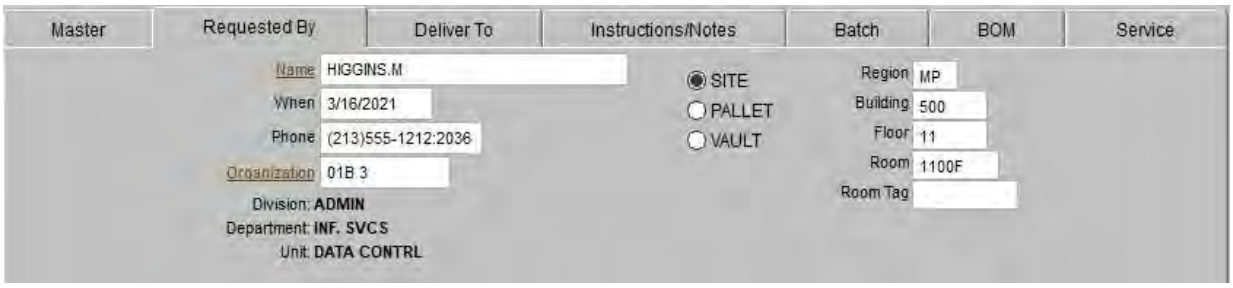


This Window shows the assets that were scanned with the Mobile Device to complete the Work Order. In the example listed, six assets were required to complete the order.

Important: This Window only displays asset information after the Mobile Device has been uploaded, and the assets have been moved to the Asset table. As you may create a Work Order without requesting assets, e.g., for adjusting the temperature control in a room within your building, this Window can also remain empty.

THE REQUESTED BY TAB

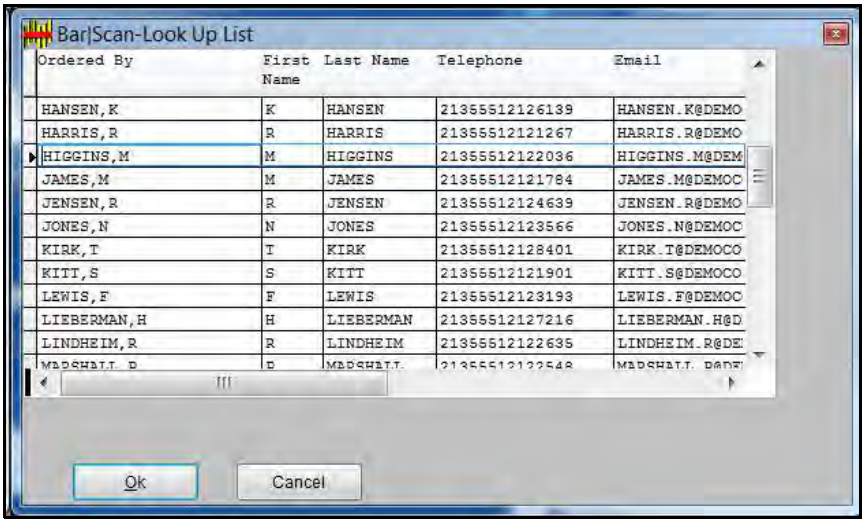
When filling out the information for the Work Order, you will need to fill out the information on the rest of the tabs. Click on the second tab, or press the F3 key, and you will be shown a tab similar to the following.



Requested By Name

This entry is most often used to identify the name of the person using (or responsible for) the asset. Some companies prefer to use the name of a supervisor or department head.

When you right click on the desired field or press F5, the following Look up Selection Window will appear.



You may select one of the names, or press ESC to leave the entry blank.

Requested By When

This item identifies the date when the Work Order was requested. When you create a new Work Order, Bar|Scan automatically enters the date from your computer into this field. This can, however, be manually changed by you.

If you are entering Work Orders based on telephone requests, you would probably not manually change this item. If you are entering Work Orders based on facsimile or paper transmittals, you may wish to change the date to the date on the paperwork.

If you wish to change this item, move the cursor to the entry, type in the characters and press the TAB key.

Requested By Phone

Bar|Scan permits you to enter the area code, telephone number, and extension number of the individual responsible or using the asset. You may enter any or all of the numbers.

Move the cursor to the desired part of the entry and type in the numbers. When complete, press the TAB key.

Requested By Organization

The Ownership information identifies the organization and individual responsible for the asset, and how the asset was obtained; leased, purchased, customer furnished, etc. To help identify specific asset locations, the name and telephone number of the person using the asset can be entered.

The Division, Department, and Unit entries are provided to permit you to identify the different organizations which have possession and responsibility for the asset. You may identify from zero to three different organizational levels. Your choice for these entries will depend on the nature and structure of your particular company.

For example, the organization responsible for a particular Personal Computer might be the West Coast Division, the Accounting Department, and the Accounts Payable Section.

These entries permit you to describe Work Orders for which the physical location may not coincide with the organizational responsibility for the asset. Using the example above paragraph, the Accounts Payable Section may have the use of a mainframe computer terminal which is the responsibility of the Data Processing Department.

Requested By Location

The Location information identifies the current location of the Work Order. It may not identify the location of the assets associated with the Work Order, this is done in the Line Item section.

The Region, Building, Floor, Room, and Room Tag entries are provided to permit you to identify the location of the Requester, or, the first asset, etc. Your choice for these entries will depend on the nature and structure of your particular company.

These entries permit you to describe Work Orders for which the physical location may not coincide with the organizational responsibility for the asset, i.e., a mainframe computer terminal may be located in an unusual location, or the Requestor may not be in the Department listed in the Organization listed.

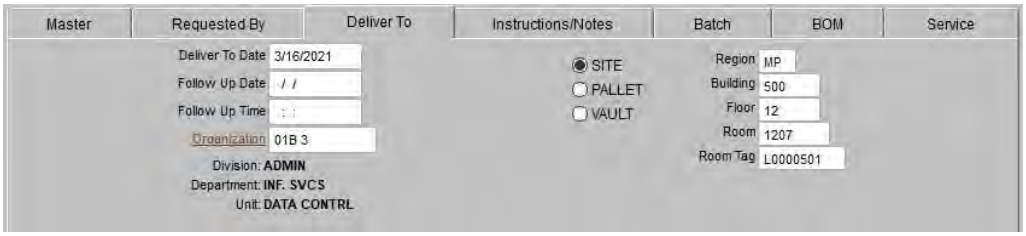
Site, Pallet, or Vault Location

Move the cursor to enter the location type, and then right click on any of the location fields, and you will see a Look up Window, that lists all of the locations that are in your Bar|Scan system. Selecting one item will cause additional items to be entered.

All Look up Window selections are based on the Location described in *Chapter 9 - Locations*. New locations cannot be entered on the Work Order Display Screen, they must be added to the Location table.

THE DELIVER TO TAB

Next, you will want to fill in the Deliver To information. Click on the Deliver To tab, or press the F3 key, and you will be shown a tab similar to the following.



These items identify when the Work Order and Line Items are to be delivered.

In most cases, you will want to enter information here unless the Work Order does not involve moving the assets, i.e., a repair Work Order.

Deliver To Date

When you create a new Work Order, Bar|Scan automatically enters the current date into this field. The date is taken from the date of your computer. This can be manually changed by you to some future date as specified by the Requestor.

If you wish to change this item, move the cursor to the entry, type the desired characters and press the TAB key.

Follow Up Date & Follow Up Time

These items identify when and if the Work Order requires a follow up. If you enter a follow up date, you will be able to create reports ordered or filtered by this date and/or time.

You may wish to use Follow Up Time if the Requestor indicates a specific time of day. Remember that time is saved as Military Time, e.g., 14:00 hours is 2:00 p.m.
If you wish to add these items, move the cursor to the entries, type the desired characters and press the TAB key.

Organization Code

This code is used to identify the different combinations of Division, Department, and Unit.

When you place your cursor on the Organization Code field and right click, or press F5, and select Look up Value, the following Look up List will appear.

Move the cursor to the desired Organization Code, and press the Ok button.

When you select a code, the associated Division, Department, and Unit will be automatically displayed below the Organization Code.

Deliver To Location

Deliver To is similar in appearance to the Requested By section. It identifies the completion organization and location of the Work Order.

These are optional fields, and are not required to complete the Work Order.

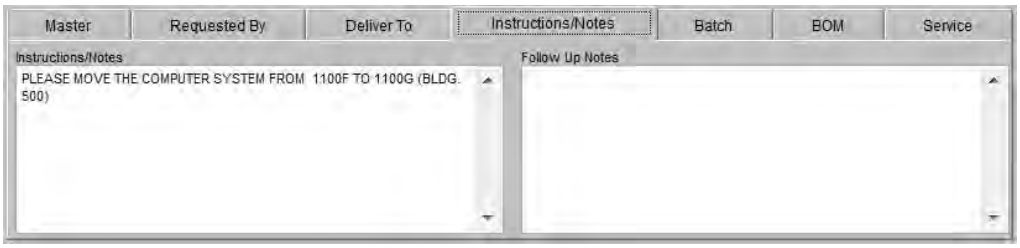
Move the cursor to enter the location type, and then right click on any of the location fields, and you will see a Look up Window, that lists all of the locations that are in your Bar|Scan system. Selecting one item will cause additional items to be entered.

All Look up Window selections are based on the Location described in *Chapter 9 - Locations*. New locations cannot be entered on the Work Order panel. They must be added at the Location panel.

Depending on your own procedures, you can leave this entry blank and add your deliver to information separately for each line item. In this way, you can create several delivery locations on a single Work Order.

INSTRUCTIONS/NOTES TAB

This tab is used to document any notes or instructions as well as follow up notes in the Work Order. Both fields are a *free form* item of no particular length. This means that if you get to the end of the entry, you can continue typing and the item will continue to scroll. Information is not lost when it is scrolled off of the screen. Select the Instruction/Notes tab by clicking on it, or by pressing the F3 key, and you will see a tab similar to the one below.



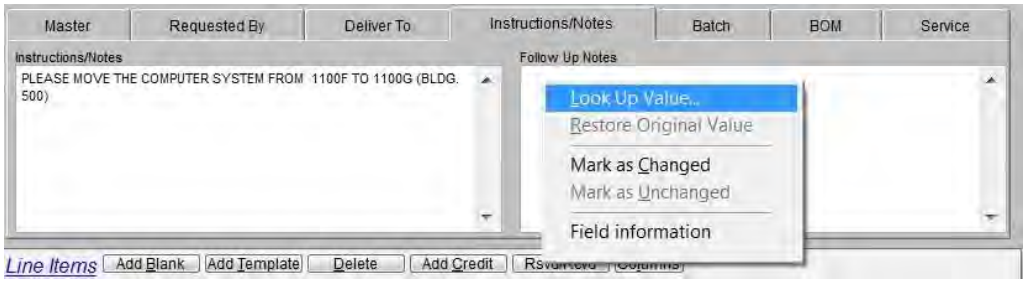
Enter any notes or instructions, as appropriate. Avoid using the ENTER key because the notes will automatically wrap around to the next line. You will also wish to avoid using the ENTER key because the notes will be spaced to fit the Work Order report, which is different that the Display Screen.

Use the arrow keys to move your cursor around within the text. If you wish to add notes, move the cursor to this entry, type in the characters.

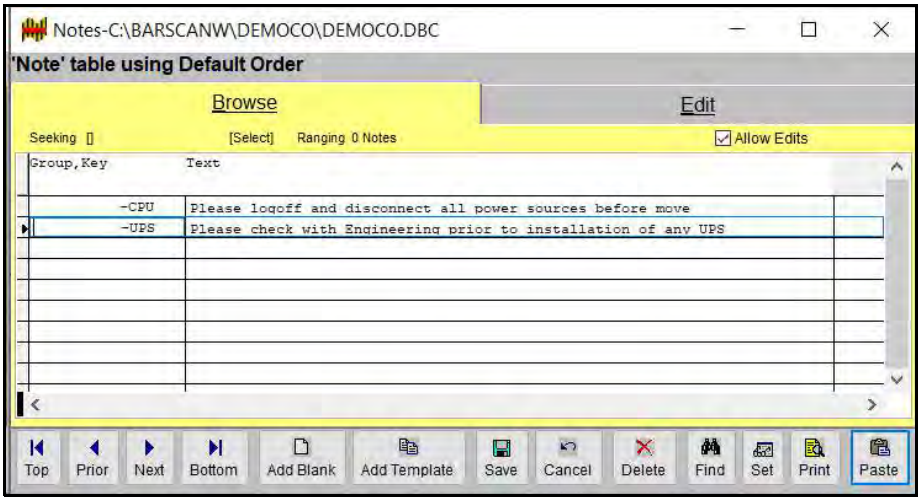
Hint: If you are not specifying assets on the line items, you will probably need to provide more specific instructions.

Bar|Scan provides a Note Table where you can store notes that you expect to use on a regular basis. A key field is assigned to each note and then used to Paste the complete note into the Instructions or Follow up Field.

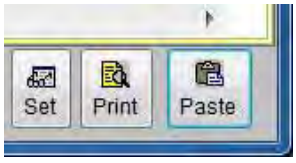
To open the Note Table, right click, or press F5, and select Look up Value as in the example below.



Select Look up Value. The Notes Table will appear as in the example below.



Pressing the Paste Button will insert the Notes into the Work Order.



BATCH

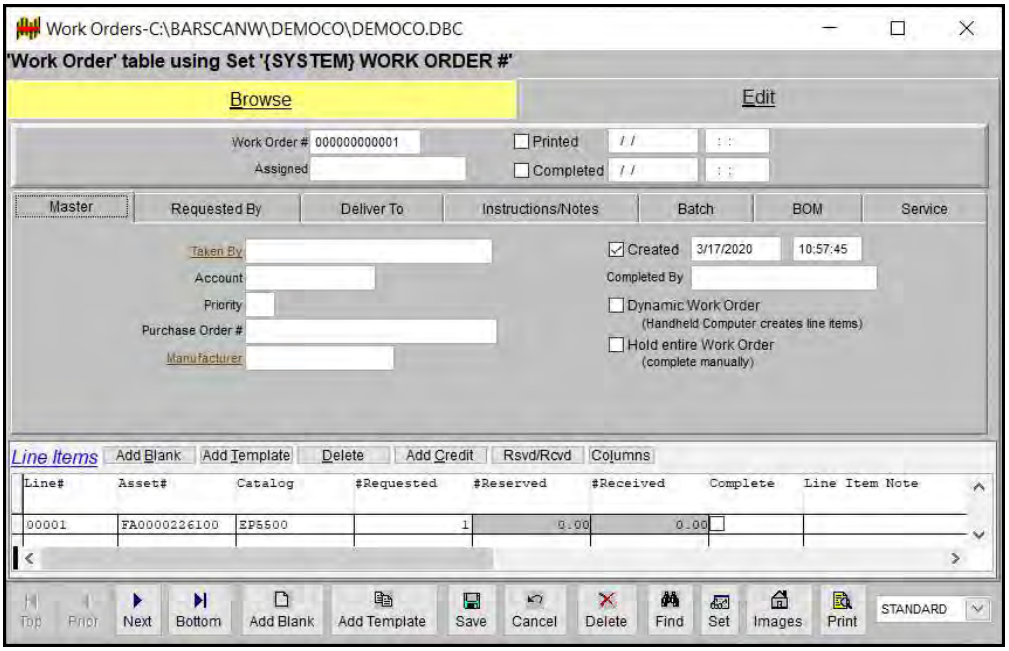
The Batch tab of the Work Order feature is a special case of entering Work Orders not used by most of our customers. For that reason, it is discussed at the end of this Chapter.

BOM

BOM is short for Bill of Material. When you select Reserved BOMs ...▸, Create Work Orders, all your Ranged Reserved Bill of Material items are used to generate the appropriate Work Orders.

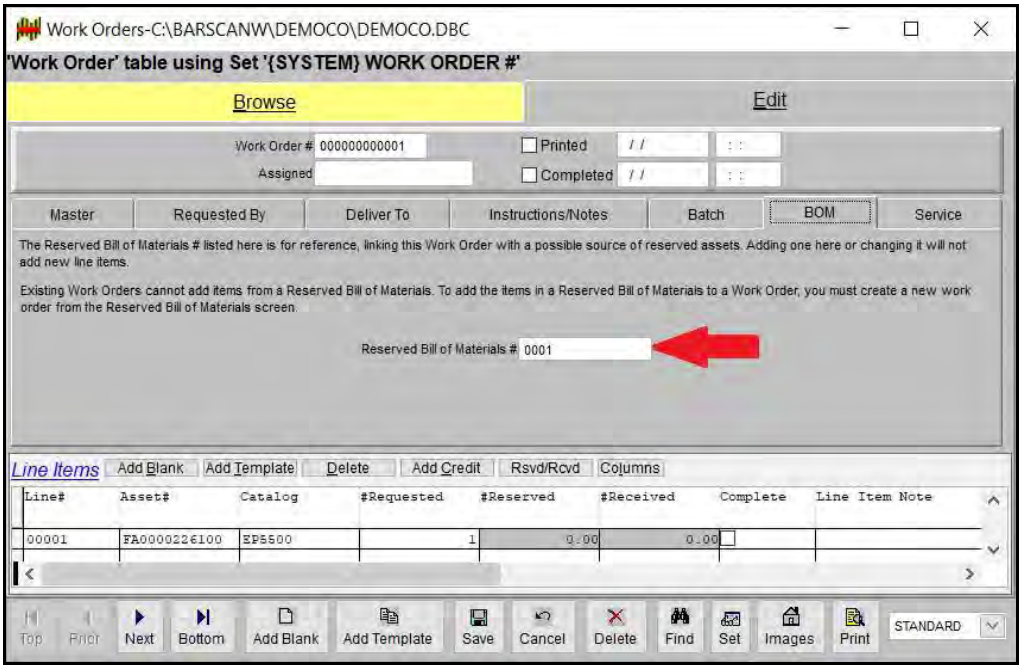
There is one Work Order generated for each Reserved Bill of Material.

When completed, you can open your Work Orders to review them. The example below was created from the Reserved Bill of Material example on the previous page.



Note that all Line Items and other previously entered information was copied from the selected Reserved Bill of Material.

When you choose the Edit Tab of the Work Order, you will see a Tab called 'BOM'. If you used the Reserved Bill of Materials Screen to generate the Work Order, the Reserved Bill of Materials Number will be displayed on this tab as shown on the following screen.



You can process these Work Orders in the same manner as your manually created Work Orders.

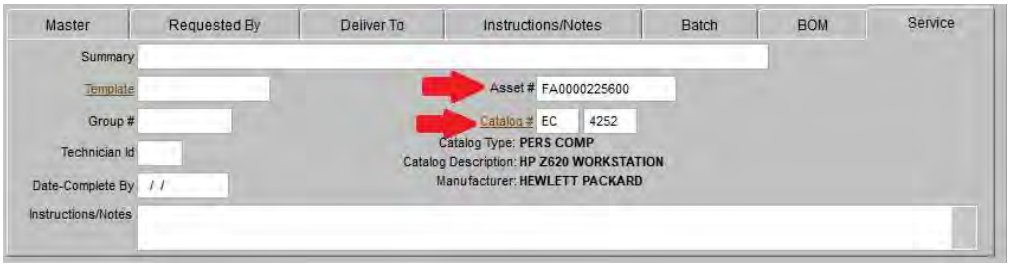
Service Tab

This tab is used in conjunction with the Service Orders feature in the handheld.

If you are not using Service Orders in the handheld, you will want to leave this screen blank.

Basically a Service Order is an instruction to perform a task or group or tasks associated with one asset. In other words, for each asset that is listed on the Service Order, you can perform and record multiple tasks.

When you select Service, you are presented with the following screen.



Here you can choose a Work Order Template and enter in relevant Service Order information.

For more information on the handheld portion of this feature, see Chapter 11, section titled “Service Orders”.

Completing the Work Order

Work Orders do not need to refer to assets. For example, you may create a Work Order to adjust a temperature control in a room within your building.

If the Work Order is complete, save your work now by selecting the Save icon from the tool bar, or pressing the Ctrl + S key combination. If you will be referring to assets on the Work Order proceed with the following section.

Refer to *Chapter 10 - Reports* to print your Work Orders.

CHANGING WORK ORDER INFORMATION

From time to time you will want to change, correct, or add information associated with Work Orders currently existing in the Bar|Scan system.

Move the highlight bar to the desired Work Order on the Browse panel. Select it, and then select the Edit tab. On the Edit panel, you may add or change information at will. Remember to save your changes by selecting the Save icon from the tool bar, or pressing the Ctrl + S key combination.

Keep in mind that there may be changes that will affect your work order processing cycle. For example unchecking the 'Completed' item will affect reporting as well as future use of the handheld if updating line items.

DELETING A WORK ORDER

This feature completely removes Work Orders from the Bar|Scan system. Obviously, caution should be exercised when using this feature.

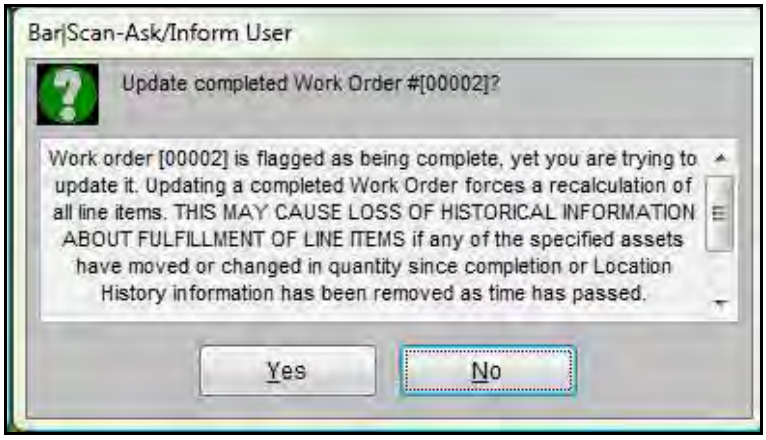
Removing Work Orders from the system is most often done due to erroneous entries. We generally recommend that, when Work Orders are disposed of, the Work Orders remain in the Bar|Scan system for an extended period of time, identified by some method you devise to indicate a "disposed of" Work Order.

Bar|Scan permits you to identify a group of Work Orders which can be removed from the system all at once. Use the SET feature to first identify a particular group of Work Orders that you wish to remove.

To select the Delete feature, highlight the desired Work Orders by using the Range feature, press the ENTER key, and then select the Delete button from the tool bar. You will be asked to confirm your choice. If you do confirm that you want to delete these Work Orders, they will immediately be removed from your Bar|Scan database.

Changes to Assets

Once the line items have been marked as completed, Bar|Scan still monitors the items in the Asset Table. At some point, you may be changing information about different assets in your Asset table. You may see a message like the one below.



This message says that Work Order [00002] is flagged as being complete, yet you are trying to update it. Updating a completed Work Order forces a recalculation of all line items. THIS MAY CAUSE LOSS OF HISTORICAL INFORMATION ABOUT FULFILLMENT OF LINE ITEMS if any of the specified assets have moved or changed in quantity since completion of Location History information has been removed as time has passed.

Basically, this message is a warning that you are changing information that you have specified in a completed Work Order. Therefore, if for instance your asset has since moved to a new location, rather than changing the existing location in the Location History, simply add a new location.

WORK ORDER REPORTS

In addition to the regular system reports available, you have access to an additional feature to further customize your reports. You can create a custom report. Custom reports are generally created by a BarScan administrator who has knowledge of BarScan's report designer. This is an end user tool, there is no computer programming needed to accomplish this. We have created two custom reports: The GFS Work Order report, and the Warehouse Pick List. You can view and print these reports, and although you cannot change the format, you can change the order, and the way they print.

In many cases Bar|Scan Work Orders are used as replacements to manual Work Order systems. These custom reports are designed to appear like generic Work Orders.

This feature can save you a lot of time, as you can have these reports customized to your exact specifications, using information such as: complete, incomplete, the Work Order number, the delivery location, including filters, specific dates, any other Work Order item.

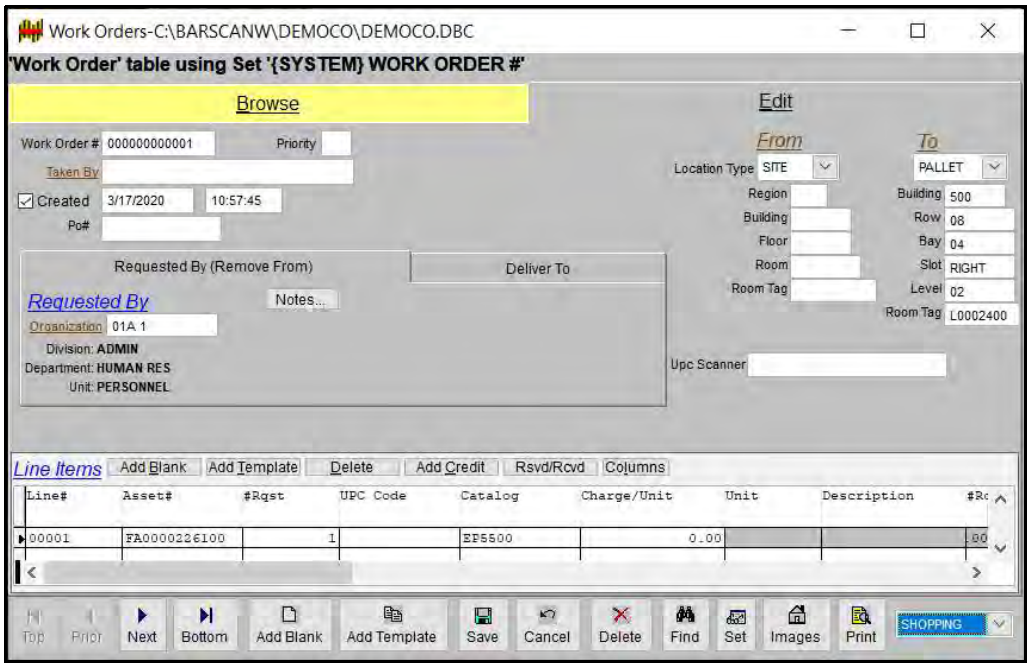
If you are not familiar with the report designer and are interested in having a custom report created for your business, please contact your Bar|Scan dealer.

SHOPPING SCREEN

The last item shown on the Work Order table tool bar says Standard, and has a down arrow next to it. It is displayed below.

For most of our customers, this item can remain at the default. But, by pressing the down arrow, you will see the words Shopping. This item is used mainly by retail or warehouse check-out areas.

The Shopping mode was designed to only track Takes, with a minimal amount of information. When Shopping is selected, the Edit tab will change to the following.



There are two major differences between a Shopping Screen and the regular Work Order Screen. The first is the addition of a UPC Code field, and the second is the addition of the Add Credit Button. Both of these are normally found only in a retail environment.

UPC Code

The UPC Code is short for *Uniform Product Code*. This is the bar code symbology that is used for most retail products, from a soft drink can to a case of motor oil. By placing the cursor on the UPC Scanner field and scanning the item with a fixed station scanner (attached to the computer), you can quickly add line items based on these bar codes. You will, however, need to tell Bar|Scan what these UPC codes mean. This can be done on the Catalog Screen. Each item you expect to scan must have a Catalog created for it, in advance. Refer to *Chapter 7 - Catalogs*, for more information on creating Catalogs.

Add Credit

It will also be more common for items to be returned in a retail setting than a Corporate or Fixed Asset Warehousing environment. The Add Credit button can be used to facilitate these returns.

Placing you cursor on the Line Item that is being returned and then clicking on the Add Credit button creates a new Line Item which reverses the Number of Items requested.

All other fields on this screen are identical the fields already discussed in this Chapter.

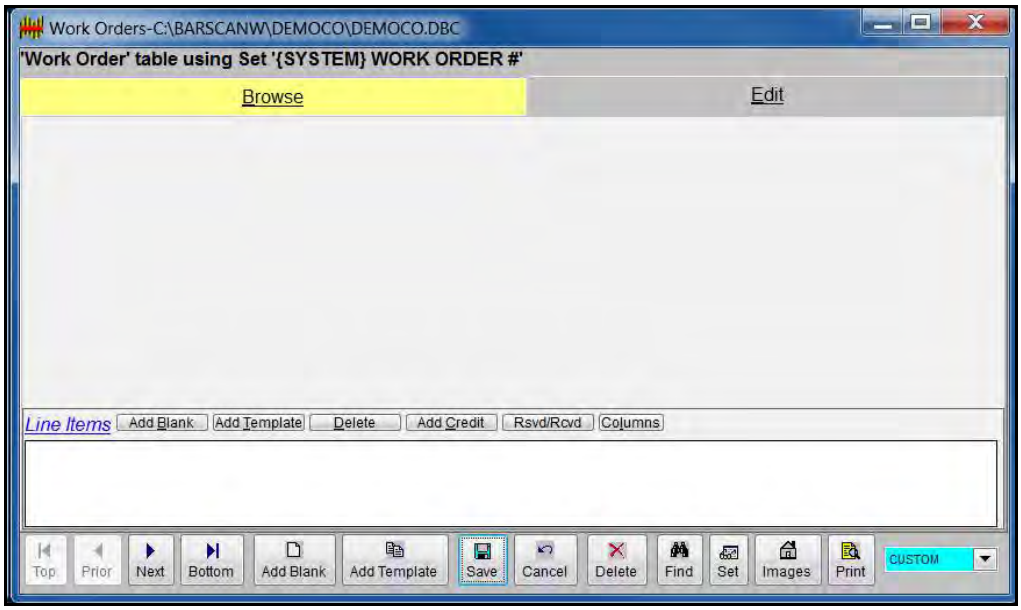
If you need additional details on the Shopping Screen features, consult your Bar|Scan Dealer for more information.

CUSTOM SCREEN

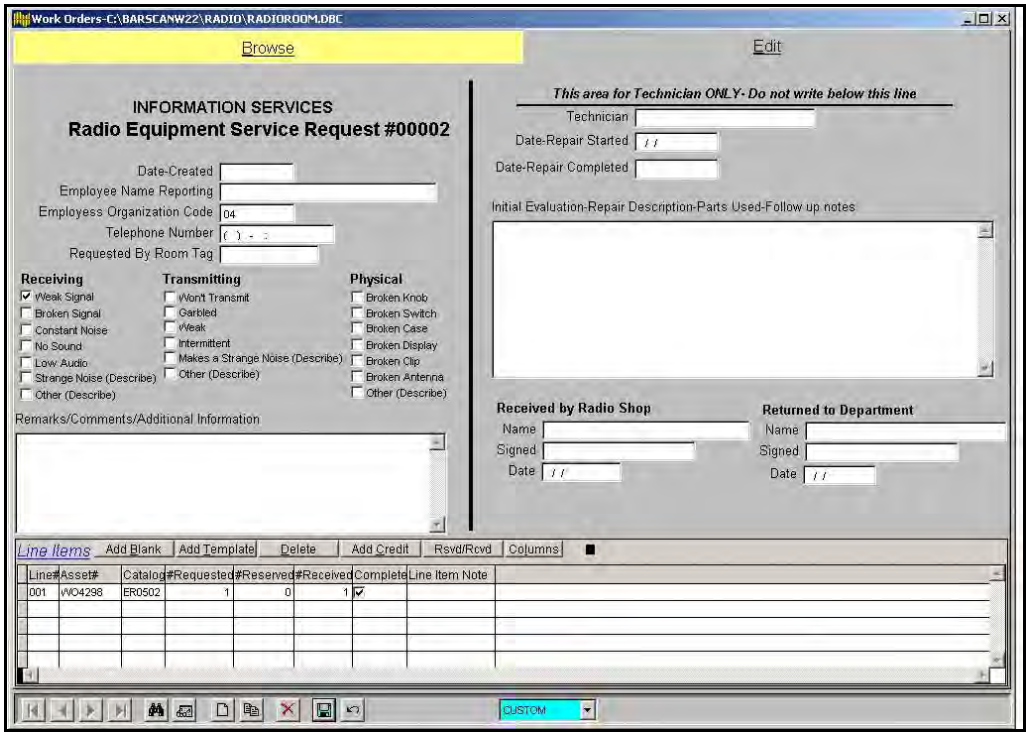
The last item shown on the Work Order table tool bar says Standard, and has a down arrow next to it. It can be changed to Custom as is displayed below.

For most of our customers, this item can remain at the default Standard Mode. But, by pressing the down arrow, you will see the words Custom. This allows you to create a new Work Order Panel of your own design. The User Defined Fields Module is required to create your panel.

When you first change to Custom, the following Panel will be displayed.



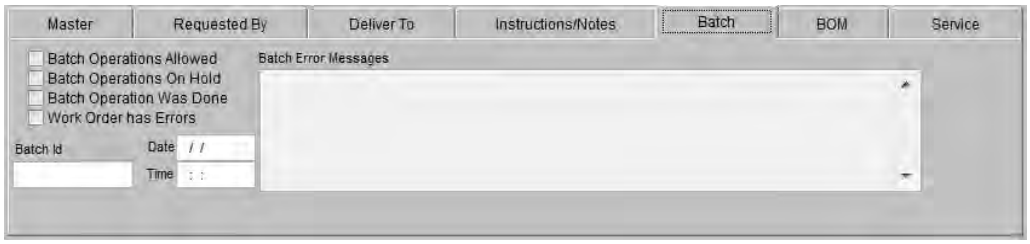
You can now add User Defined Fields to customize your Work Order Screen. Make sure that you place a check mark in the “Visable on UDF Tab” properties icon when you create your user defined fields. Below is a sample of a completed Custom Work Order.



BATCH OPERATION

This section is part of the standard Work Order screen but is discussed here, at the end of this Chapter, since most users will not require it's features.

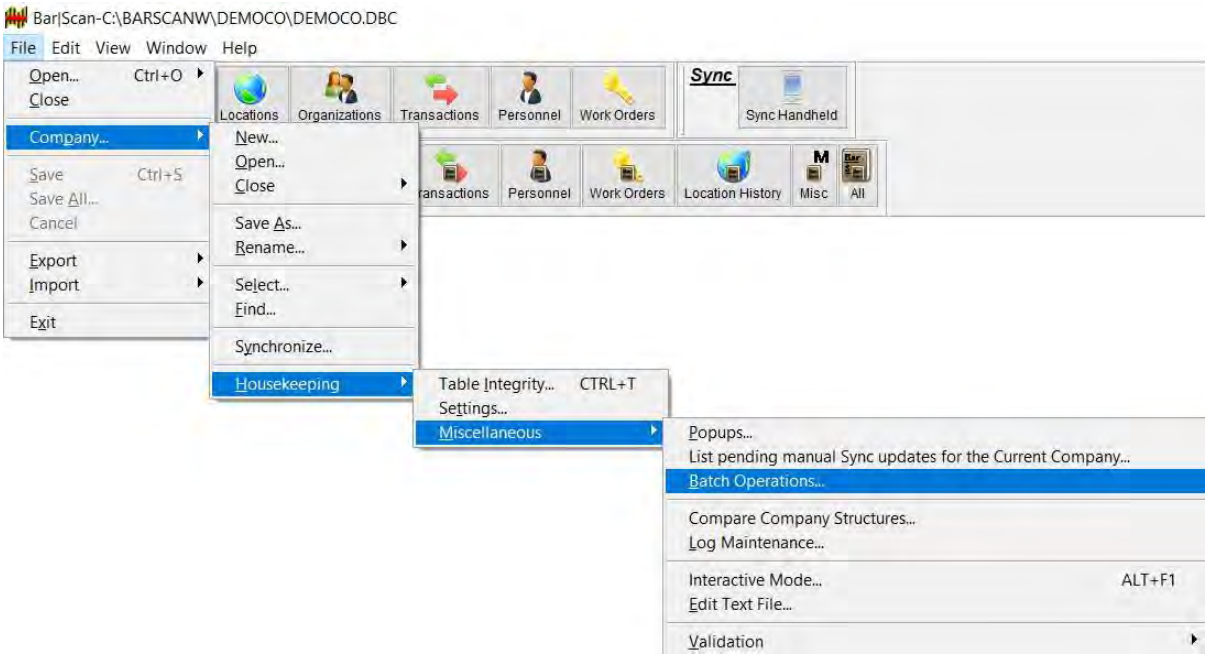
This tab is used to perform Batch operations in the Work Order. Select the Batch tab by clicking on it, or by pressing the F3 key, and you will see a tab similar to the one below.



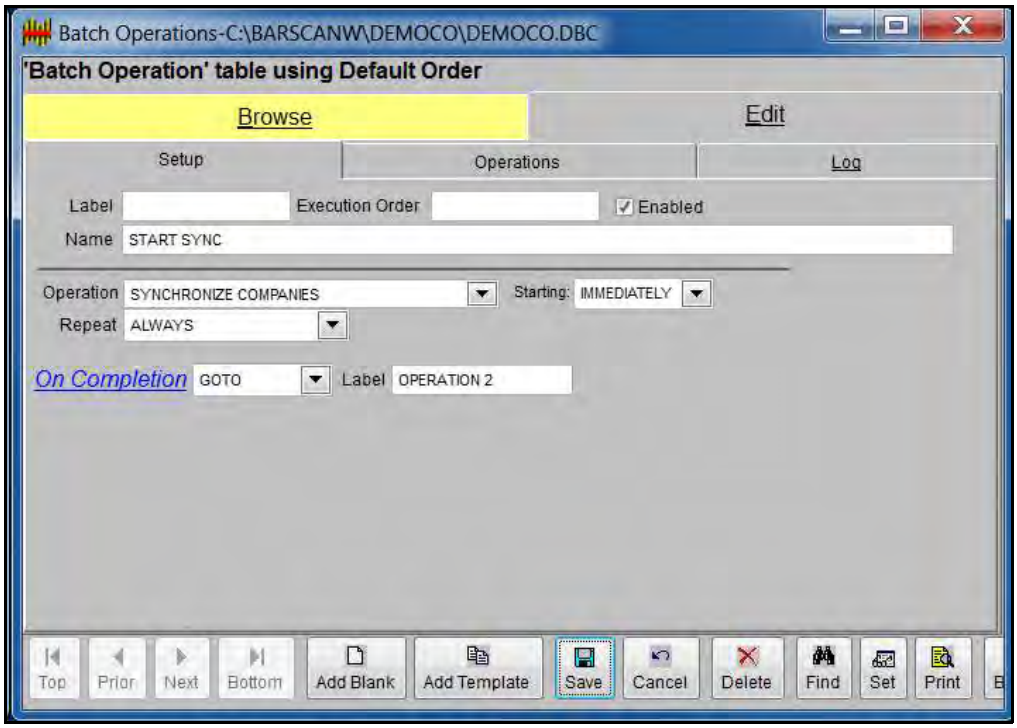
Batch operations in the Work Order feature are not necessary unless you are interfacing the Work Order Feature to another software application and you are communicating with the other application using ODBC connectivity. Sometimes the Batch operation is also useful if you are importing from a flat file.

Here is how it works. Suppose your other software application was a web based Work Order system which was constantly generating Work Orders and placing them into the Bar|Scan Work Order Table using ODBC connectivity. How would you know that new Work Orders exist for printing or if changes were made to other Work Orders? It would be very difficult, unless there was a field in Bar|Scan that could tell you that the Work Order was updated by this other software application and Bar|Scan constantly searched the Work Order table looking for these additions or changes. The Batch operation does both of these.

The process begins by setting up a Batch operation schedule so that Bar|Scan knows how often to search through the database for changes. To do this, simply go to the Main Menu, and select File ...▸, Company ...▸, Housekeeping ...▸ Miscellaneous ...▸ Batch Operation as shown below.



When you have selected Batch Operation, a Screen similar to the following will appear.

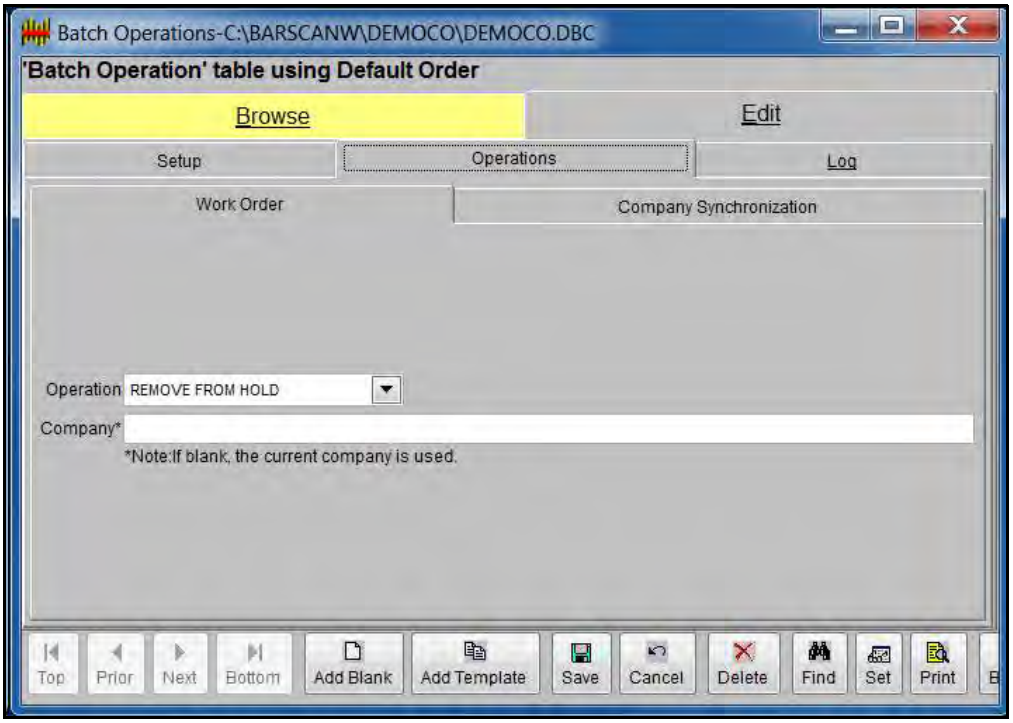


Notice that there are three tabs to Batch Operation. The first of these three tabs, the Setup Tab, opens as the default, and is displayed above. This is the primary Tab used to schedule the Batch Operation. You can constantly scan the Work Order Table, as shown above, or you can set it to scan by selecting the Repeat pull down. When you select the pull down, you will see a Look up List similar to the one at the right.

The actual increment that you use depends on the volume of activity that you anticipate. If your web application is only generating one Work Order an hour, you may want to select hourly or daily. Scanning does take computer resources, and can slow down Bar|Scan if you set it too frequently.

Additionally, you can give each Batch operation a name and a Label. Labels are used to link two or more Batch operations together so when the first Batch operation finishes, the second will automatically begin.

The second tab, Operations, is displayed below.



Use this tab to select which Batch operation should be performed and which Company to perform the operation on.

The third tab, Log, simply records when a Batch Operation takes place and if any errors occurred during the operation.

Unless you have previous experience with the Bar|Scan Syncronization feature, as discussed in *Chapter 13 - Housekeeping*, it is best to consult your Bar|Scan Dealer for more information prior to completing this feature.

After you and your associate have completed all three tabs, you are now ready to activate the Batch operation. To do this you must click on the Batch icon at the bottom right of your screen as shown below.

The Batch use of Company Synchronization is not discussed in this Chapter since it is not related to Work Orders.

USER DEFINED FIELDS

INTRODUCTION

The User Defined Fields module allows you to easily add new fields that will customize your Bar|Scan system to suit your needs. The User Defined Fields (UDF) module is an optional module, and was designed to allow the user to add fields that are not in the Bar|Scan system. These fields can be added to the handheld and you can also stretch or shrink any existing Bar|Scan Character based field with this module. This module can be very useful, and can save you valuable time in data entry as well as reporting.

The User Define Fields tab allows you to design a detailed data entry screen by choosing the field type you want, shape and size them onto the screen, give them a new name, and select the size of the field. Many field types are available, including text, date, numeric, logical, memo, and Bar|Scan text fields (used to modify the size of an existing Bar|Scan field).

Also, the user has the option of choosing the tab order of the fields, aligning the fields, as well as selecting an input mask that formats the data entry later on. Finally, you can enhance and organize your UDF Screen with the additional text and graphics.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

KEY FIELDS

There are many Bar|Scan fields that can be lengthened or shortened without using the UDF Module. This list of commonly adjusted fields are located on the Key Fields tab of the Company Settings Screen. Before you adjust any field, check to see if it is on this tab. It will be faster and easier to make the length adjustment here than by using the UDF module.

THE USER DEFINED FIELD TAB

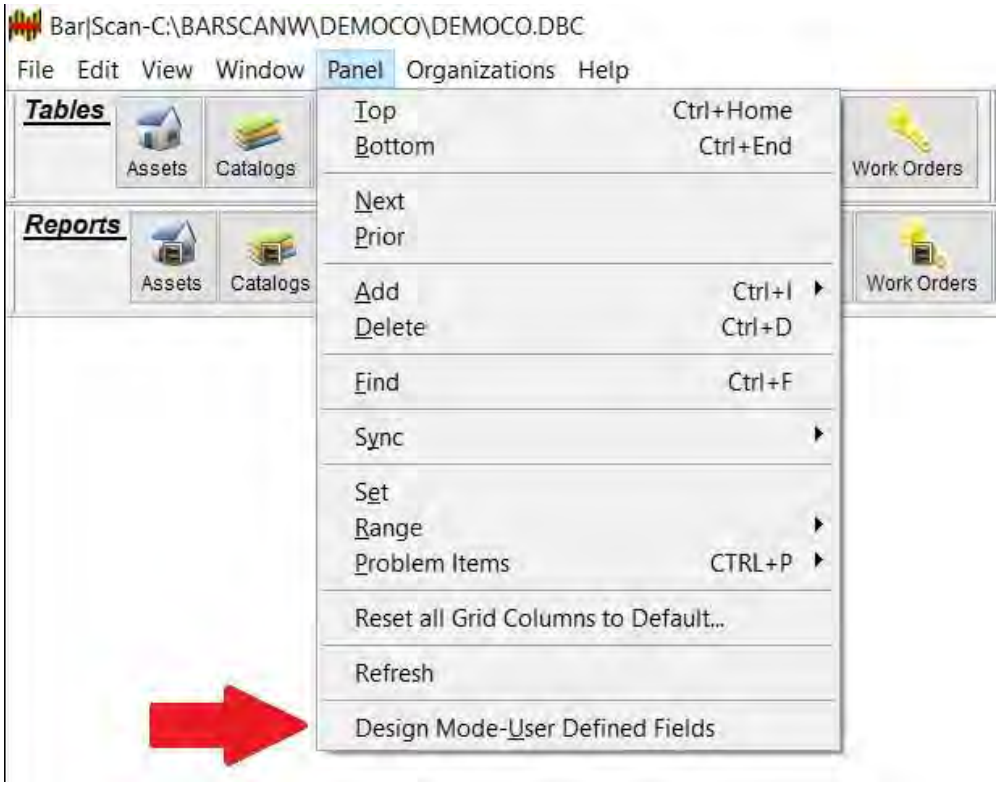
The creation of User Defined Fields works in the same manner for all of the

different tables in Bar|Scan. Therefore, no matter which table you choose to add fields, you may create the User Defined Fields in the same way.

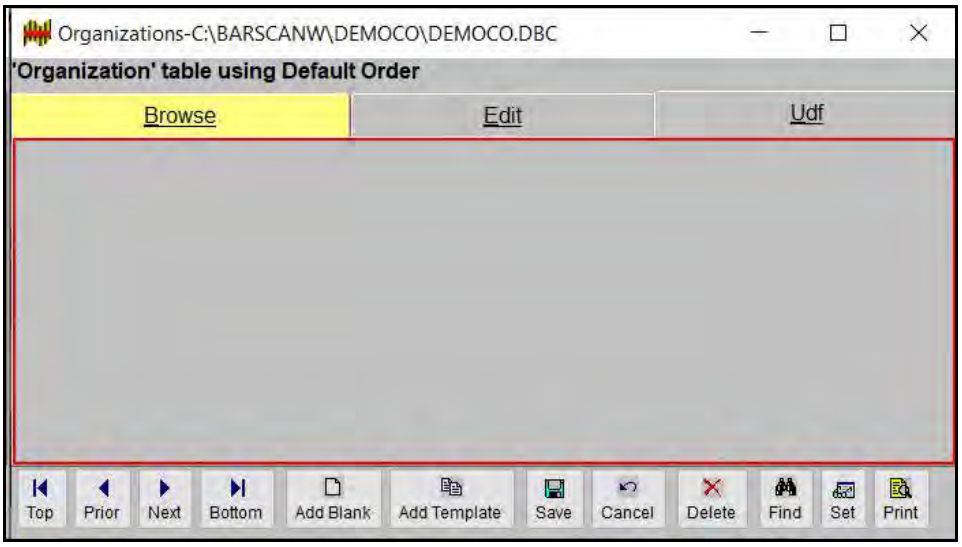
First, open a company, and then open a table. For our example, the table that will be used will be the Organization table.

From the Main Menu select File . . .▸, Company . . .▸, Open . . .▸, (select a company from your system). Then, select File . . .▸, Open . . .▸, then, any table such as Organizations.

When you first open a company table that does not contain any User Defined Fields in it, you will not see the User Defined Fields tab. If you wish to create a User Defined field for this table, you can do so by simply going to the Main Menu, and selecting Panel, then at the bottom of the drop down list select Design Mode-User Defined Fields as shown below.



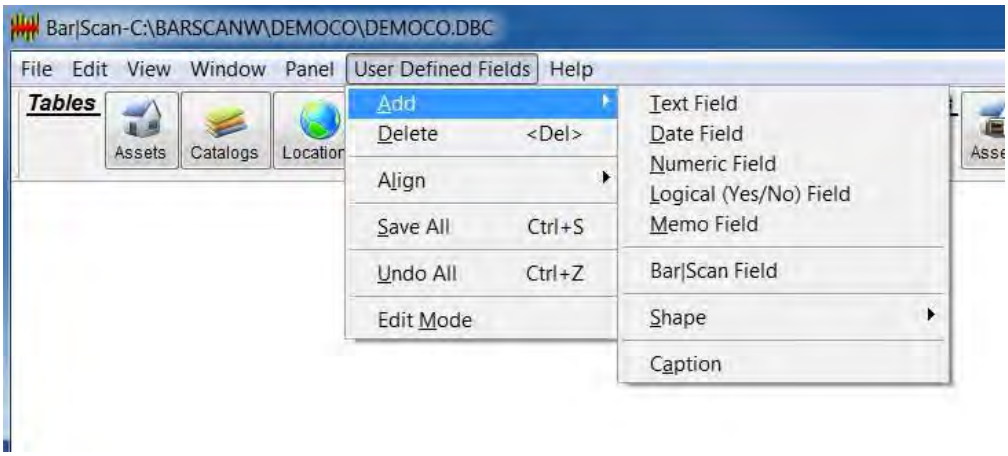
When you do this, you will see a table similar to the one below.



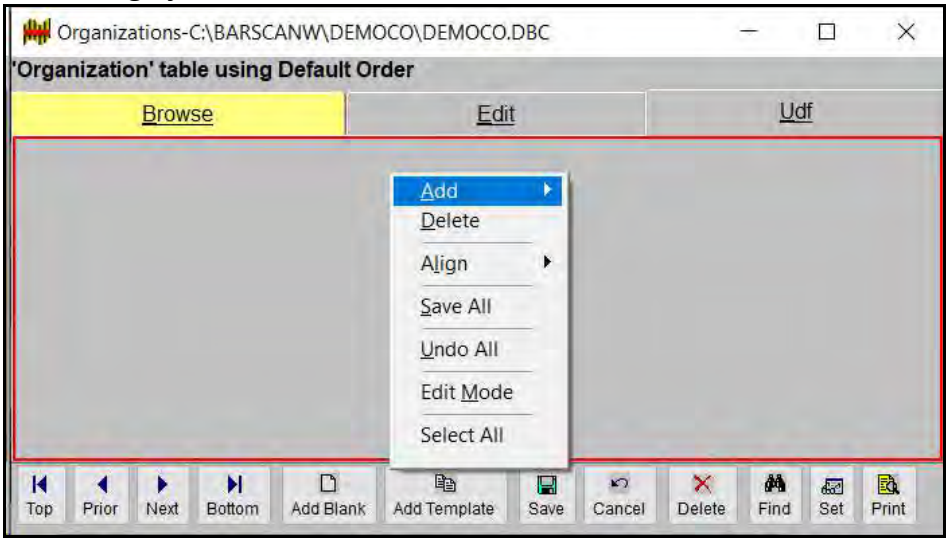
Notice that there is now a new tab labeled UDF. There is also a red outline of this table, indicating that you are now in the Design mode. While in the Design mode, you can add, modify, and place the new fields.

There are two ways to begin the process of adding a new field.

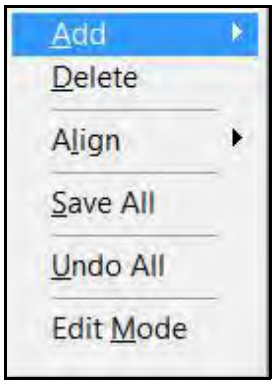
1. You may go to the Main Menu, there is now a Feature Category called User Defined Fields. Select the User Defined Fields, and you will see a drop down menu list like the one below.



2. You may also use your mouse to access a similar list by simply right clicking on the grey area of the UDF tab as shown below.

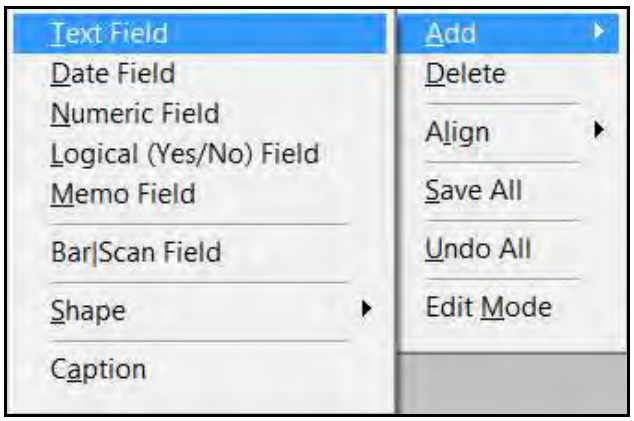


No matter which way you prefer to access the UDF drop down menu, the options and operations are the same. The options are shown below.



As you can see, the options are: Add, Delete, Align, Save All, Undo All, and Edit Mode. First, we want to look at the Add option.

When you select Add, you will see another drop down menu list as shown below.



The options for the different types of fields are: Text Field, Date Field, Numeric Field, Logical (Yes/No) Field, Memo Field, and existing Bar|Scan Text Field.

Shape and Caption are screen design tools and are discussed later..

You may choose any of the different types of fields listed; their uses are outlined below.

Text Field - This field may be used for alpha characters or a combination of alpha and numeric characters.

Date Field - This field is used for a standard date field. The date field will automatically appear using the 99/99/9999 format.

Numeric Field - This field is used for Numeric input only, characters 0-9.

Logical (Yes/No) Field - This field is used for simple Yes and No responses.

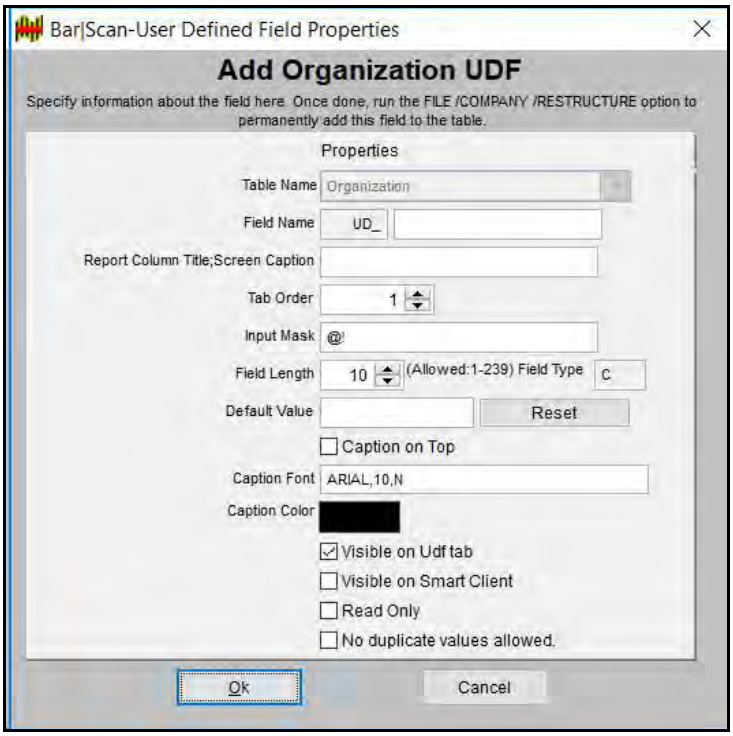
Memo Field - This is a “notes” type of field, complete with scroll bars, so that your field may actually be larger than it appears on the screen.

Bar|Scan Text Field - This field is used to adjust the widths of Bar|Scan’s standard text fields. Almost every field can be changed, but the exception to the rule is the Location Histories, as they have no table of their own.

Don’t forget that you can use the Company Settings Screen to stretch many standard fields. The advantage to this is that stretching a field like ‘Building’ will make the requested changes in all corresponding tables for you, which can be much easier that adjusting the building field in all the tables manually. For more information on this topic, see *Chapter 13 - Housekeeping.*

ADDING A FIELD

When you select Add, then a field type such as Text field, the new field will be placed on the tab and you will be immediately prompted for information about the UDF as shown below.



This box has several fields inside of it, which will help you in giving your new UDF field the balance of its properties.

The first item listed is the **Field Name**. This is the internal name that Bar|Scan will give the field. Every UDF Field name has to start with UD_, followed by no more than six more characters consisting of alpha, underscores, or numbers. For our example, we will call our field SAMPLE. Do not give the UDF a name that already exists in your Bar|Scan system.

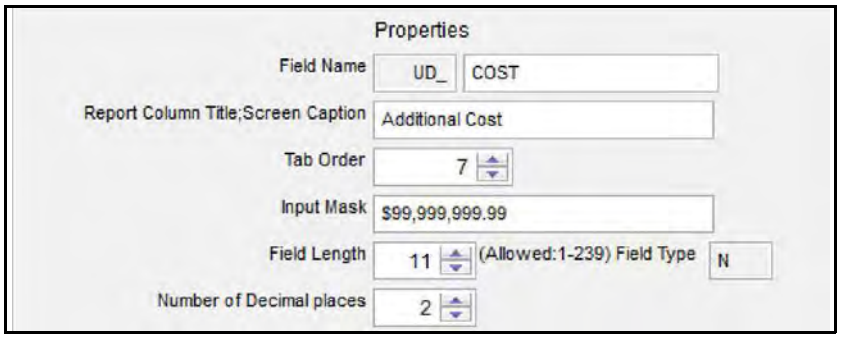
The second item listed is **Report Title, Screen Caption**. This is the name that will appear next to your new field. For our example, we will choose the description *Sample Field.*

The next item is **Tab Order**. If you have several UDFs, the tab order is very important to the person doing the data entry. For instance, if you have five UDFs and the top left hand field is listed with a blue number four, then it will be the fourth item that the cursor goes to when the tab button is pushed. Obviously, depending on how your screen is set up, you will want your tab order to go in a logical fashion, either left to right, or top to bottom.

The next item listed is the **Input Mask**. An Input Mask specifies the data entry rule each character entered must follow. If you are not familiar with what an input mask is, it is the items that are already there when you enter a field, to format the data entry process.

One example is the brackets and dashes often seen in a field where a phone number is to be entered (999) 999-9999. This allows the brackets, space, and dash to be there without having to be typed by the data entry person.

For instance you could set the Input Mask property to 999,999.99 to limit the user to input to numeric values numeric values less than 1,000,000 with two decimal places. The comma and the period would be displayed in the text box before the user entered any values. If the user pressed a character key, the character would not be displayed in the text box. Below is an example of numeric formattng.



If you have a logical field and want a user to be able to type “Y” or “N” but not “T” or “F,” set the Input Mask to “Y.”

There are many different types of characters that are acceptable for input masks. You may you use the following:

X Any character can be entered.

9 Digits and signs, such as a minus (-) sign can be entered
(999)999-9999

Digits, blanks, and signs can be entered.

$ Displays the current currency symbol in a fixed position.
For example: $99,999,999.99

$$ Displays a floating currency symbol that is always adjacent to the digits
For example: $$99,999,999.99

* Asterisks are displayed to the left of the value.

. A period specifies the decimal point position.

, Commas can be included to separate digits to the left of the decimal point.

! Allows only Uppercase

R Excludes the formatting characters (such as brackets and a dash in the telephone number) when saving the data. These characters are not counted as part of the field length, but are still displayed and printed. This can be used in any type of character field.

The default input mask for a character field is "@!", which means allow only uppercase for the entire field.

The standard Bar|Scan input mask for the telephone number field is:

(###)###-####:####

It is 14 digits long.

If you need to change the input mask so that you can collect a five digit telephone extension, you would want to change the input mask to add a @!R and a space at the beginning of the mask. It would look like this:

@!R (###)###-####:#####

Change the length to 15 digits.

You need to make an equal and like UDF for both the Transaction and the Asset table.

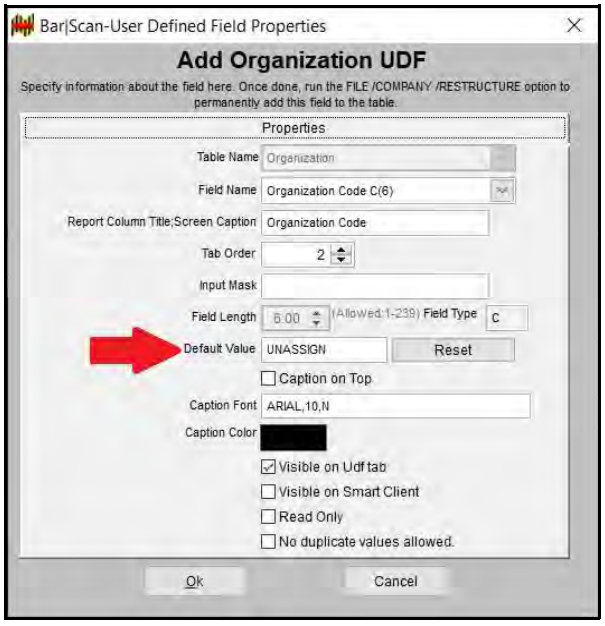
There is still one more step before Bar|Scan will acknowledge your change. Bar|Scan has an input mask for the telephone number listed in the Company Settings table as well. You have to go to the Company Settings table in Housekeeping to make the same change on the telephone input mask.

Restructure the company, and Bar|Scan will allow you to collect the additional character in the telephone number field.

The next item is the **Field Length**. The largest field length allowed depends on the type of field you are using. The maximum length for a text field is 100 characters long. Note: You will want to make sure that the actual space allowed for your field is similar to that of the field length. If you want the field to be 15 characters long, the field should be about an inch and a half long, with a depth for only one line of characters. If you want your field to be 75 characters long, make sure that you have a depth equal to at least two lines of text.

The next item is **Field Type.** The field types are: Text, Date, Numeric, Logical, and Memo. Once you create a new UDF, you cannot change the field type. If you created the UDF with the wrong field type, you must delete the UDF and create it again.

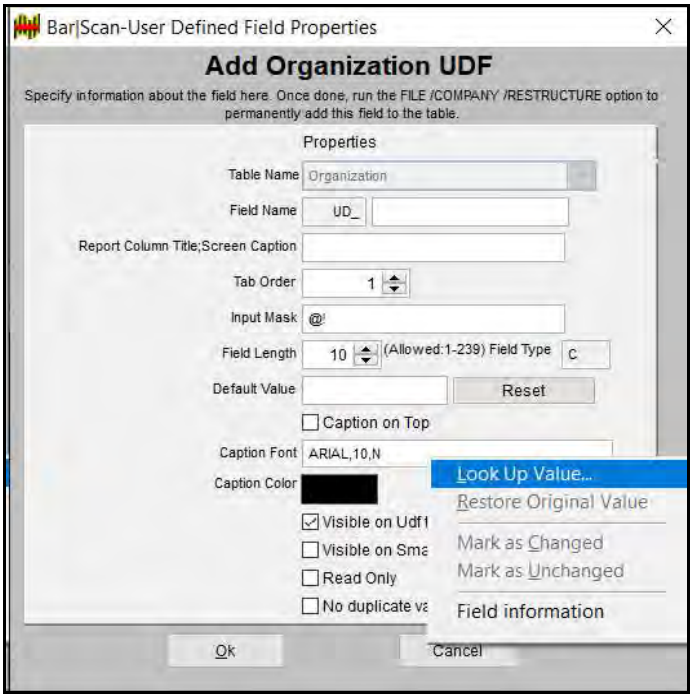
Next is the **Default Value.** Any text entered into this field will be placed into the record whenever a item is added. For example, if you type "unassigned" then the text *unassign* will appear in the field ever time you add a new Organization as shown in the example to the right.



Reset. All Bar|Scan fields have a default value, both UDF's and standard Bar|Scan fields. It is possible for a user to change the default value for a standard Bar|Scan field using this UDF dialog. This button will restore the original default value of the field.

Caption on Top. Normally the caption text will appear to the left of the UDF field. If you check this box, then the caption text will appear above the UDF field.

Caption Font. You can change the Font of the Caption being displayed on the UDF panel by entering a new font or size here. You may find this useful to emphasis important UDF fields. You can select a new font by entering the information directly or Right-clicking and selecting the font as shown on the following example.



Next is the **Caption Color**. You can change the Color of the Caption being displayed on the UDF panel by entering a new color here. You may find this useful to emphasis important UDF fields.

Next is the **Visible on UDF Tab**. In some cases, you may not wish to have the UDF field display on the UDF tab. For example, if you are stretching an existing Bar|Scan field such as the Organization Division, it is already displayed on the Edit Tab. It may not be necessary to display this again on the UDF tab. Click on this check box to hide the field on the UDF tab.

Next is the **Visible on Smart Client**. You can choose which fields will be displayed on the Edit Panel of the Bar|Scan Smart Client Application. The fields that are displayed are global for all users.

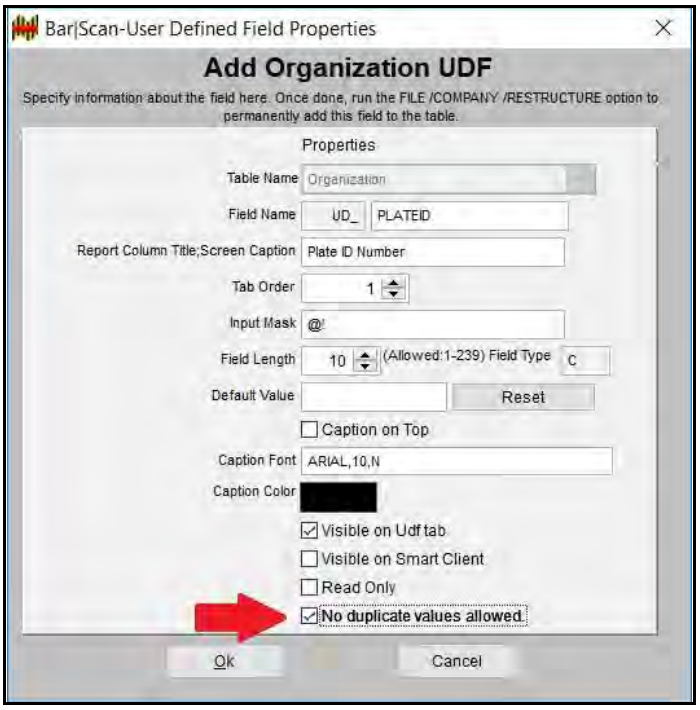
Next is the **Read Only**. You can control which fields cannot be edited on the UDF tab. Our example of a filled out UDF Property Box is shown below.

Last is the **No duplicate values allowed**. This prevents saving duplicate values within the UDF field within the table that you have selected. It is not for the handheld, only the desktop. If you attempt to save a record in any table other than the Transaction table where the value in this field already exists in some other record, then a validation error message appears.

For example, if you wanted to make sure that the Manufacturer Part numbers were genuinely unique within the catalog table, then you could create a UDF for the Manufacturer Part number field and select 'No duplicate values allowed'. If you create or edit a catalog that has the same Manufacturer Part number as in any other catalog, it will not allow you to save it.

The option is not offered in the Transaction table, for Yes/No fields or for non-data UDF's, such as a label.

See the following example:



Remember, if you make the field hold many characters, you may have to widen the field in order to be able to see all of the characters. Bar|Scan starts with a conservative initial field length to conserve file space.

Adding UDFs to the Asset Location Table

You can add User Defined Fields (UDF's) to Asset's Location History. These are specified the same way as regular UDFs for the Asset table. A typical work flow for a location history field UDF can be a little more complicated that the normal one for a standard UDF. The reason is that there are Current and Prior location history items that must be accounted for and there is a more complicated data flow. Here is an example of a Service Tag. To create a Transaction table field that is filled out in the handheld device, then is moved to the Location History and Asset table:

1. Create a Transaction table UDF called 'Service Tag'. Bar|Scan will prompt and you will allow it to create a matching Asset UDF. When done, there will be two UDF's created, one in the Transaction table and one in the Asset table. The Asset UDF will later be used and renamed as the 'Current Service Tag' value.

2. Open the Asset table and go into the edit mode for UDF's on the UDF tab.

3. Modify the 'Service Tag' field previously created, renaming it as 'Current Service Tag'.

4. Add a new Asset UDF in the Asset table named 'Prior Service Tag'. This will hold a copy of the Service Tag from the PRIOR Location history record.

5. Save all UDF work by right clicking on the UDF screen and selecting 'save all'. This will make sure that the newly added fields will be available for the next step.

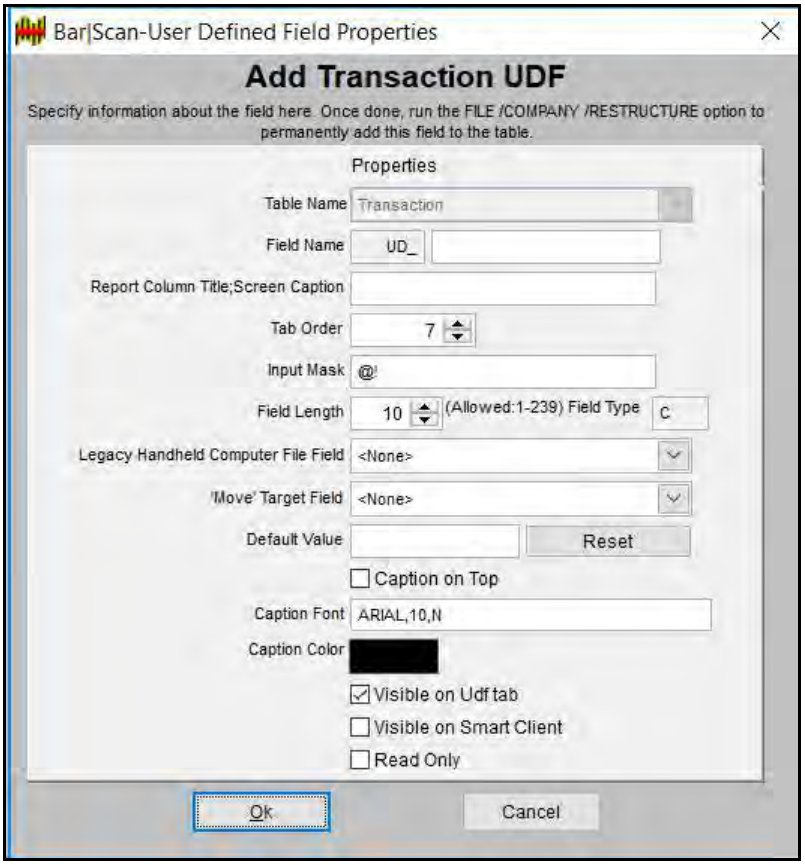
6. Add a new LOCATION HISTORY UDF. Call it 'Service Tag'. To create this UDF, add a UDF in the Asset screen UDF panel as normal, but In the new UDF where you will see listed the Asset table, click on it and a choice of either ASSET or LOCATION HISTORY is presented. Change it to Location History. When you pick Location History two sets of combo boxes will appear. Here you will specify the previously created Current and Prior Asset fields to hold those values as moved from the Location History.

7. Save all UDF work by right clicking on the UDF screen and selecting 'save all'.

8. Finally, do a Table Integrity to create the fields.

The Mobile Device UDFs

The Transaction Table has a special type of UDF Properties screen to control UDFs collected in the Mobile Device. The screen is displayed below.

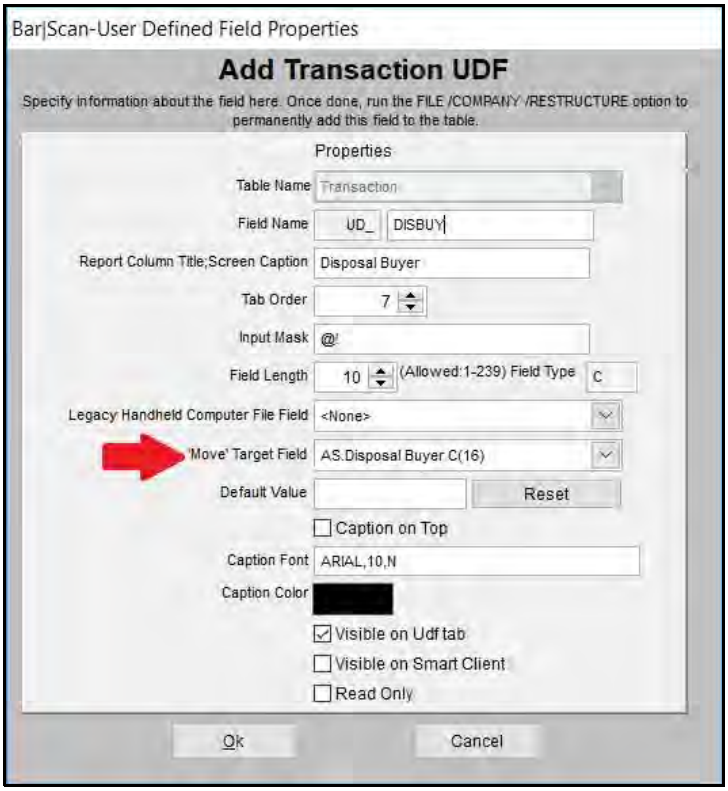


There is one additional information to complete the UDF properly, *'Move' target field*.

The 'Move' Target Field is optional. If you create a UDF with the same Field Name in the Asset Table, then the Asset field is automatically updated when the Asset moves from the Transaction Table to the Asset Table. You can also select alternative Asset Fields to "redirect" fields from the Transaction Table to other existing fields in the Asset Table.'

By using this feature you can collect Accounting or Date fields in the Mobile Device and move them to existing Asset Fields such as Purchase Cost or Disposal Date.

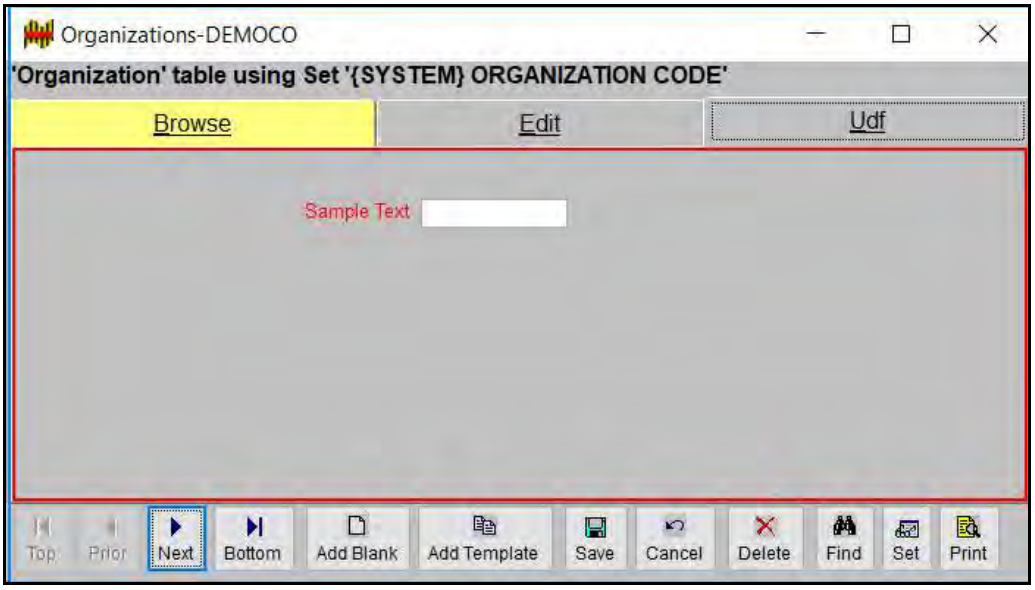
Here is an example of creating a field 'Disposal Buyer', which is not a standard Transaction Table field, and moving it into the Asset Tables 'Disposal Buyer' field, which is a standard Asset Table field.



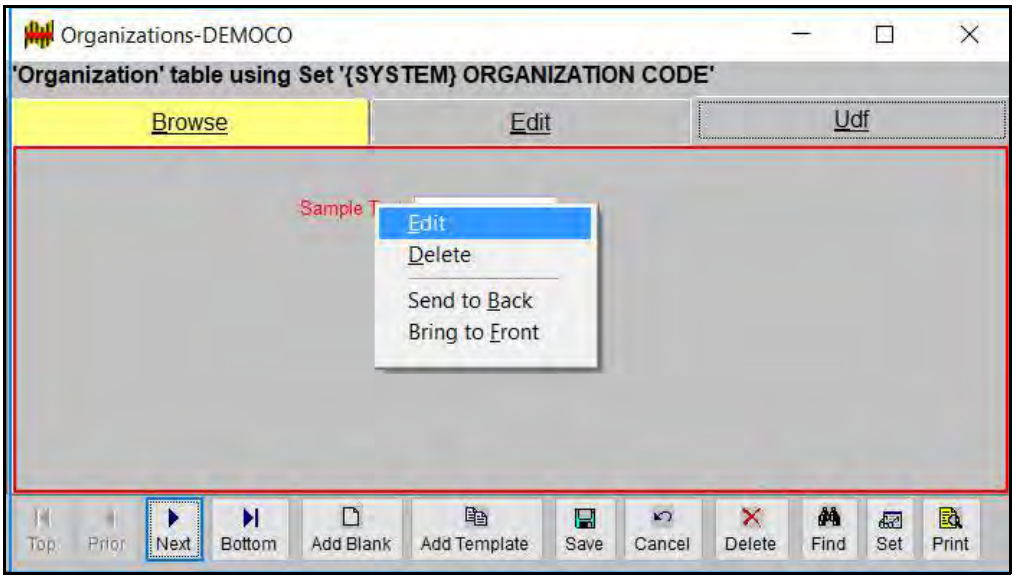
Remember, you need to perform a Table Integrity before your changes will take effect.

EDITING OR DELETING A FIELD

You can now Edit or Delete the newly created field. If you choose Edit, you will begin the process by selecting "Design Mode-User Defined Files" from the Panel Pull-down on the Main Menu. The red outline that appears will indicate that you are now in Design mode as shown in the sample below.



As shown in the previous screen, the field that we added was a text field. Use your mouse to left click on the title of the field, click on the word Sample Text.



Note that this new dialog box has four options, Edit, Delete, Send to Back, and Bring to Front.

Edit allows you to make changes to the UDF such as stretching or shrinking the field, or changing the Caption or Font.

Delete allows you to delete the UDF field from the database. Under normal circumstances, Bar|Scan makes the field invisible after a restructure but does not actually delete the UDF from the Table. Most often, this is the preferred method of deleting.

If you are sure that you no longer wish to use the UDF , you must select "Verify operations on each Table" on the Table Integrity screen to actually delete the field.

Send to Back is used when you are designing a screen with additional shapes such as boxes, underlines, etc. This is especially useful when you are moving fields into a box or resizing the box. Because shapes can be placed over fields or other shapes, this assists you in selecting the correct UDF or shape to edit.

Bring to Front is the opposite of **Send to Back** and is also used when editing your work.

Moving a Field

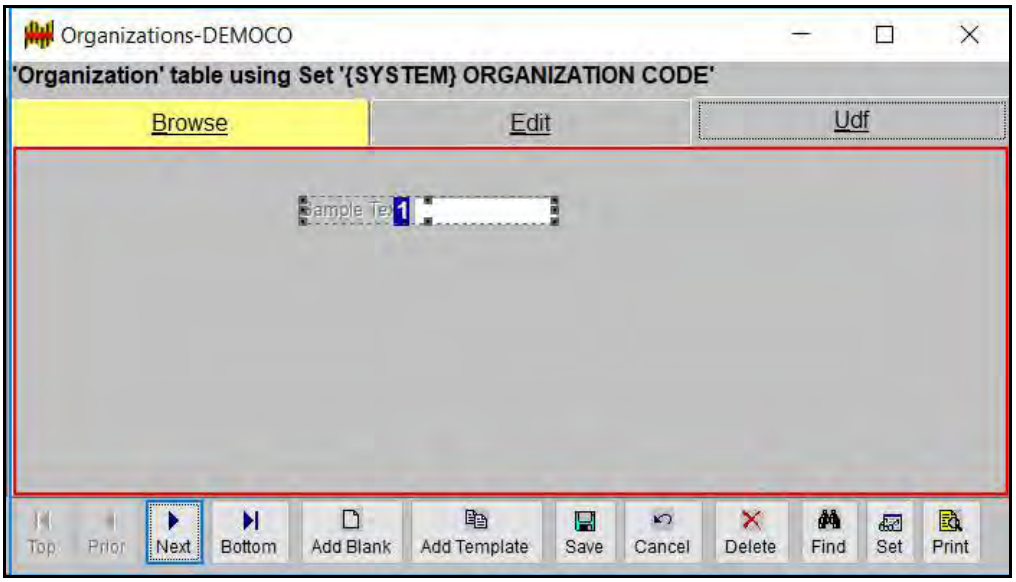
When you left click on the title, the appearance of the field will change as shown below.

Notice the title is now greyed out, there is a number one in the center, and there is a dotted box around the field with small boxes on the end. You may now move or resize this field.

The blue number one shown in the center of the field denotes the tab order. So, with this field being number one, your cursor will be placed in this field first. When you add more fields, their tab numbers will increase. When the screen is done, the tab order denotes in which field your cursor will be placed when you press the tab key.

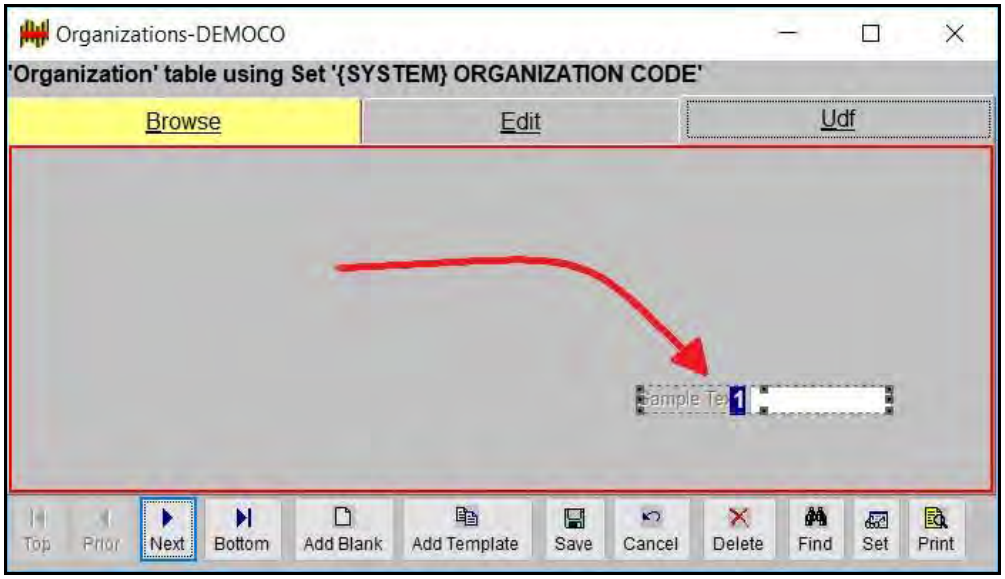
You can change the tab order at any time.

The dotted line symbolizes the actual appearance size of the field, and may be modified by placing your cursor on the small boxes until you see a double headed arrow. When your cursor becomes a double headed arrow, you may left click and drag the boxes, making the rectangle shown larger or smaller, as shown below.



The size of the field does not affect how many characters the field can hold. It is for display purposes only.

You also have the ability to move the field, by left clicking on the grey area (inside the dotted line), holding the mouse button down, and dragging the field to a new area.

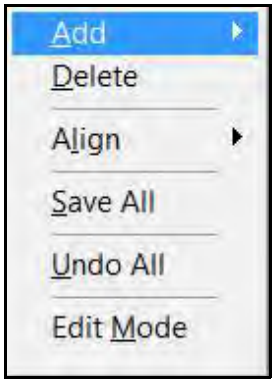


Now you know how to add a field, move it, and size it.

We will now show how you can move a number of fields as a group.

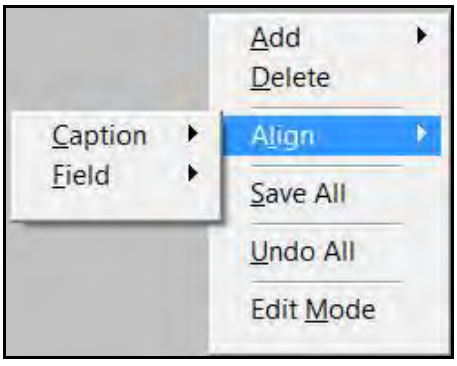
MOVING ITEMS ON THE PANEL

The next item that you see on the original drop down menu as shown below is Delete.



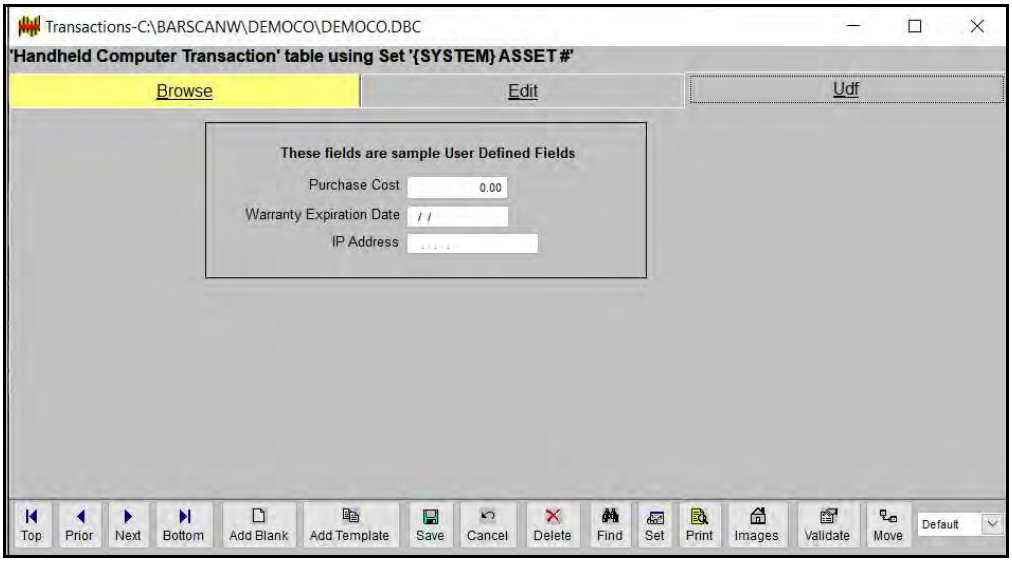
When you want to delete the field before you save it, you can select the field, then select this item.

Align is the third choice. When you select Align, you will see a drop down menu as shown below.



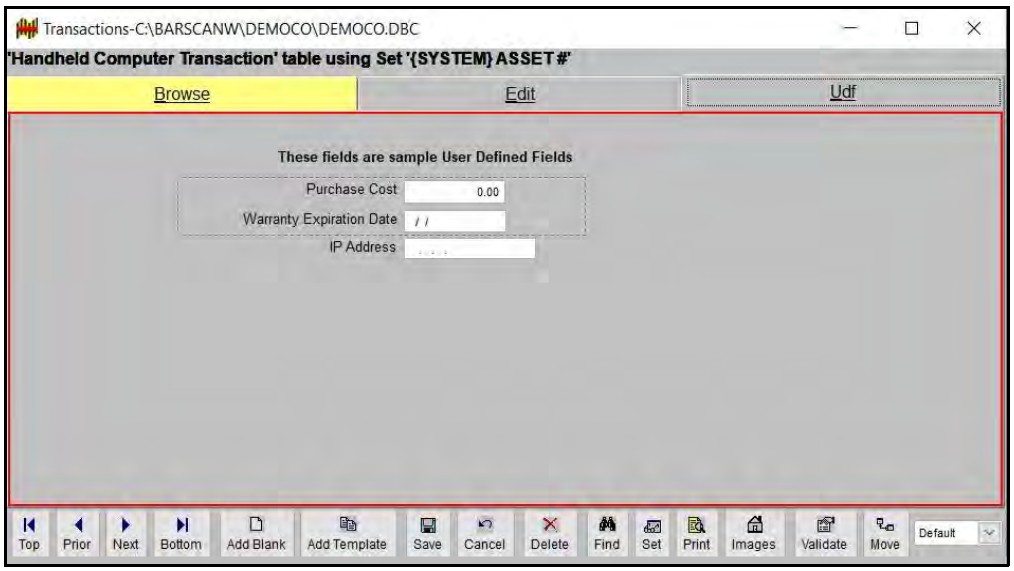
You can align items by the Caption or the Field. Your choices for each are Left and Top.

You can align the items so that words outside of your field are aligned, and the fields are not, or, you can align the fields, and the wording will not be aligned. An example of aligning the fields to the left, is shown below.

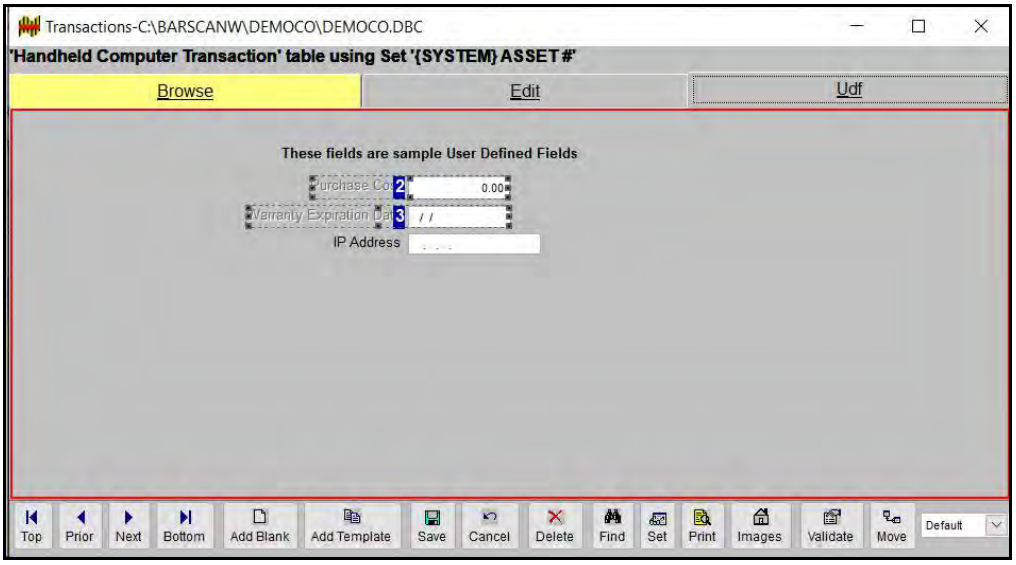


As shown, the words are not aligned on the left, but the fields are. In contrast, you could choose to align the words on the left, but, the boxes would be uneven.

Before you can align any of the items, you must select them. Click in the grey area outside of the fields. Hold your left mouse button down, and drag your mouse to create a rectangle or square (made of dotted lines) around the fields that you wish to align.

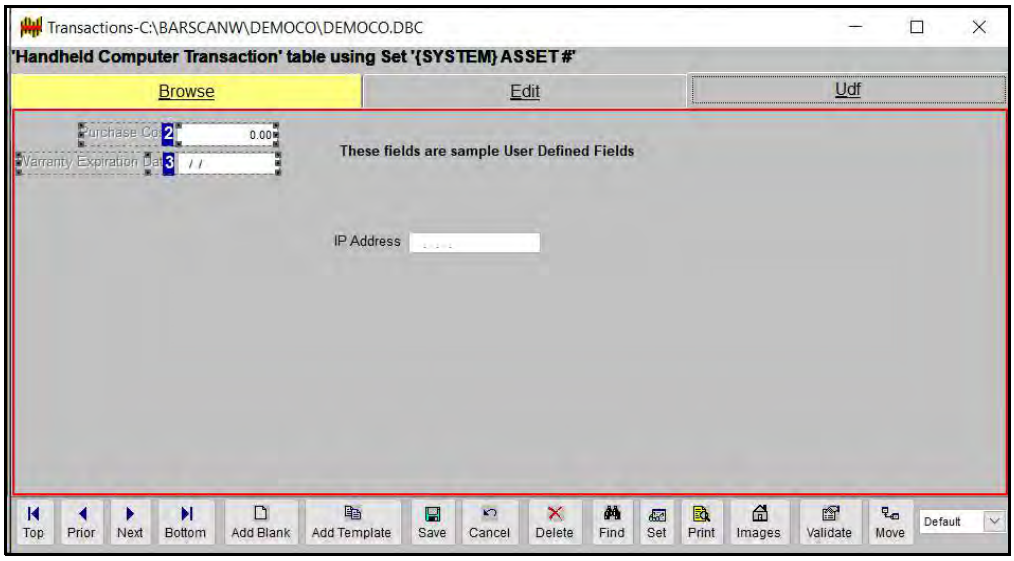


Selecting the items that you want to align is easy. Simply use your left mouse button to click slightly outside of the area you want to align, hold the mouse button down, and drag your mouse so that the rectangle that you are creating encloses the items that you want aligned. After you have highlighted these items, they will appear differently, as shown below, the top two fields have been selected.



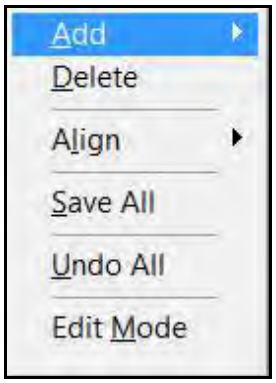
You can now right click on the blank grey area, and you will see the drop down menu, where you can select align. For this example, we will select align Caption.

On the example below, we left the first three fields highlighted. Then, we clicked inside one of the fields, and dragged them (collectively) to a new location.



As this window shows, you can move the items, and align the items in portions, until you believe the screen appears perfect. Remember to check your tab order, so that when you hit your tab key, it will access the fields in a logical order.

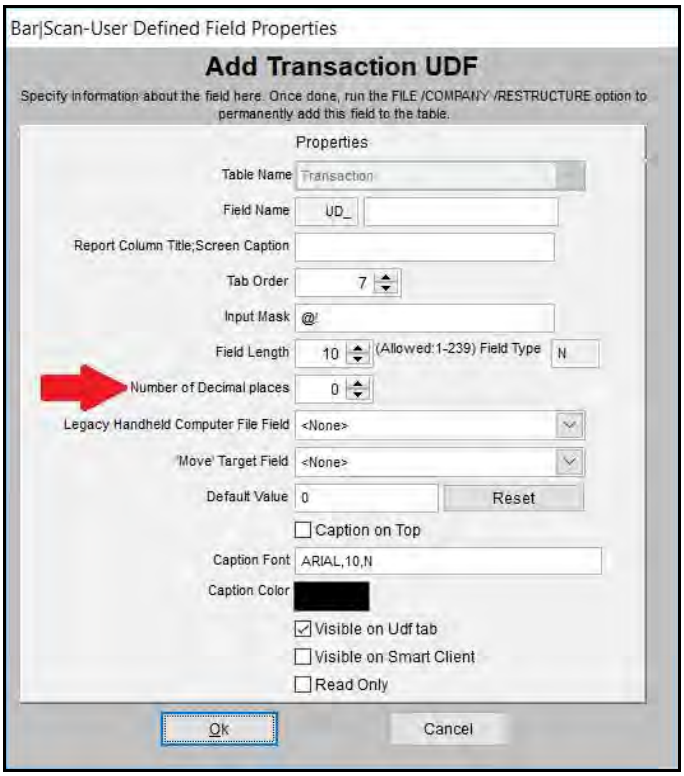
The next items two items on the pull down are Save All and Undo All, as shown below. These items are self-explanatory.



The last item is Edit Mode. When you click on this item, the red edit box will disappear, and you will no longer be in the Edit Mode.

Numeric Fields

There is one slight difference when you select a Numeric field over any of the other types of fields. Bar|Scan will allow you to select the number of decimal places that you wish as shown below.

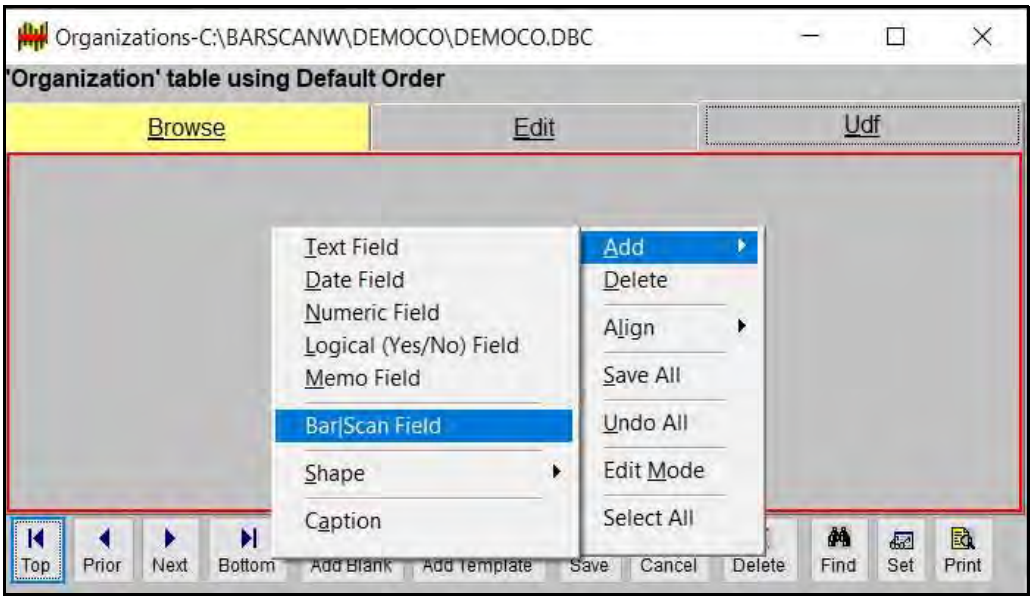


On this window, you will need to fill out the Field Name, and place a description in the Description field. Check the Tab Order, and change if needed. Then, decide if you want your field to be only numeric or to appear as a dollar amount, and fill in the fields as necessary.

For instance, if you wish your item to appear as a dollar amount of less than one million dollars, you may place a mask of $999,999.99 in the input mask field, and click on the up arrow to change the field length and the decimal places from zero to two.

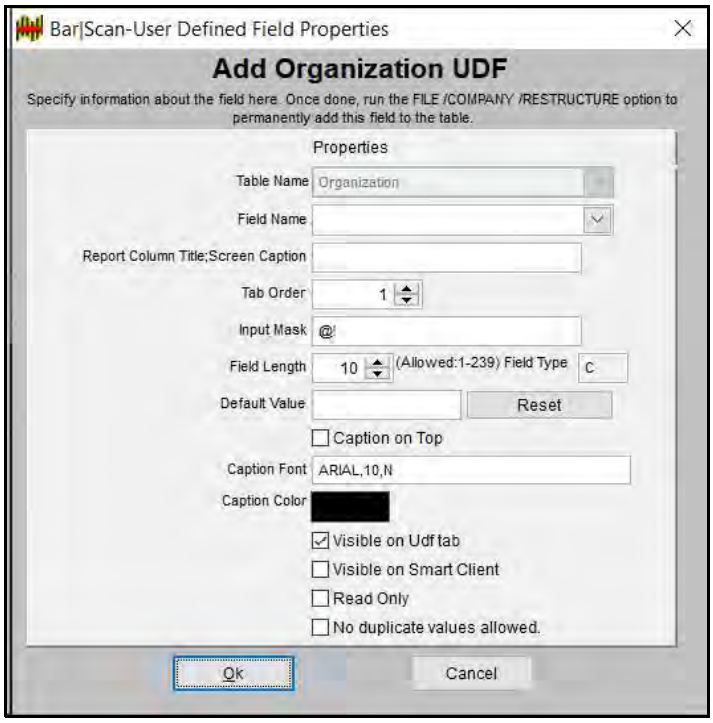
Changing Standard Bar|Scan Fields

There may be a time when you want to change the length of a standard Bar|Scan field, i.e., perhaps you need the Catalog Description field to be four characters longer. Making the field longer is possible, by selecting Add, and then Bar|Scan Field as shown below.



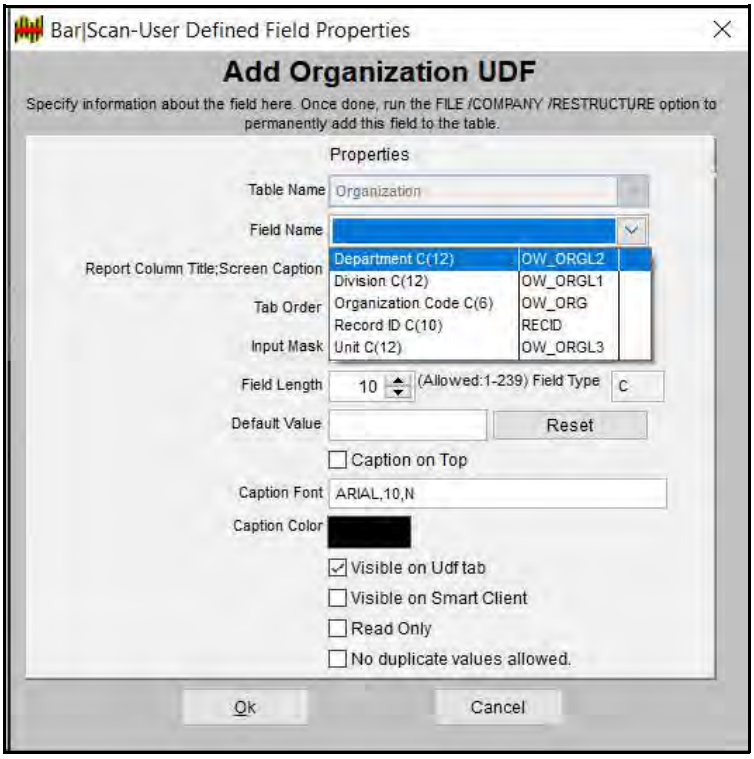
When you select the Bar|Scan Field, you will be shown a standard field, that you will have to edit.

When you right click and select Edit, you will see a window similar to the one below.



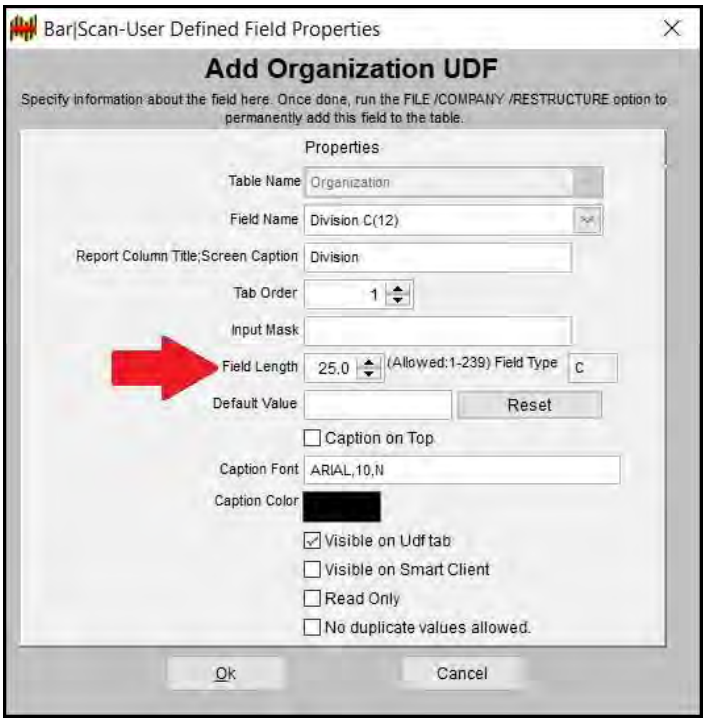
On this tab, you will select the field that you want to change the length of.

There is a down arrow next to the field titled Field Name. If you click on this down arrow, you will be shown a list of the fields that are available for the table that you are in as shown below.



Immediately behind the field name, there is a letter for the type of field C is for character, N for Numerical, etc.) and a number in parenthesis to tell you how many characters the field can now hold.

After you have selected the Division field, you may proceed to change the length of the field from 12 to a different length. In the example below, we have changed the length of the field from 12 to 25.



Depending on where the field resides in your table, you may want to change the tab order, but note that this is not a field that you will have to be accessing each time you fill in the other UDFs, so it is best to have this field appear either first or last.

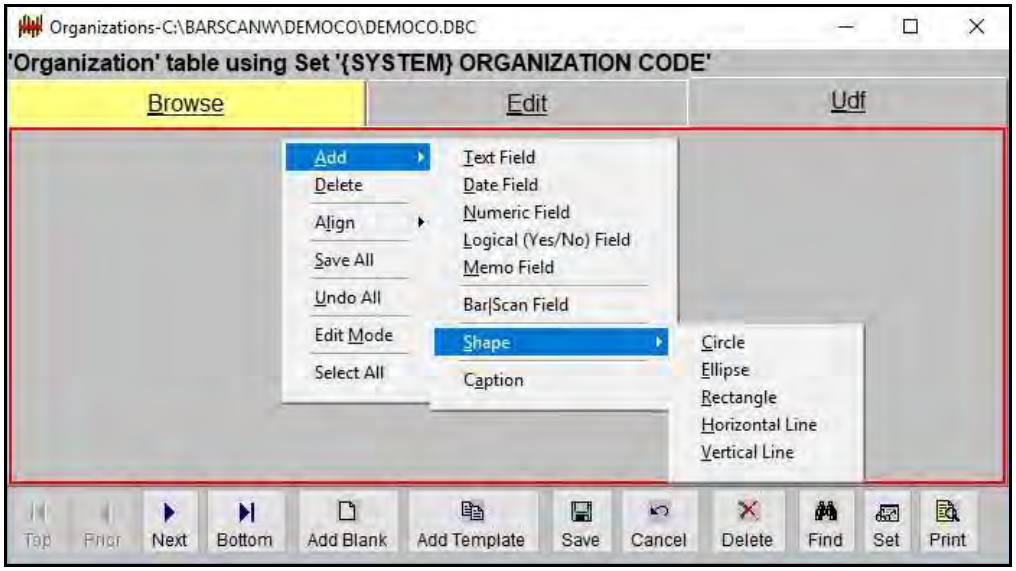
The Input Mask field has one exclamation point for every character in the field. If you are making the field larger by five characters, add five exclamation points.

Alternatively you can use the Mask @! means all upper case, which is usually the easiest format for any Character Field.

Remember, if you are making the field hold more characters, it does not automatically make the field wider in size. You may need to stretch to size of the field in order to be able to see all of your new characters.

Shape and Captions

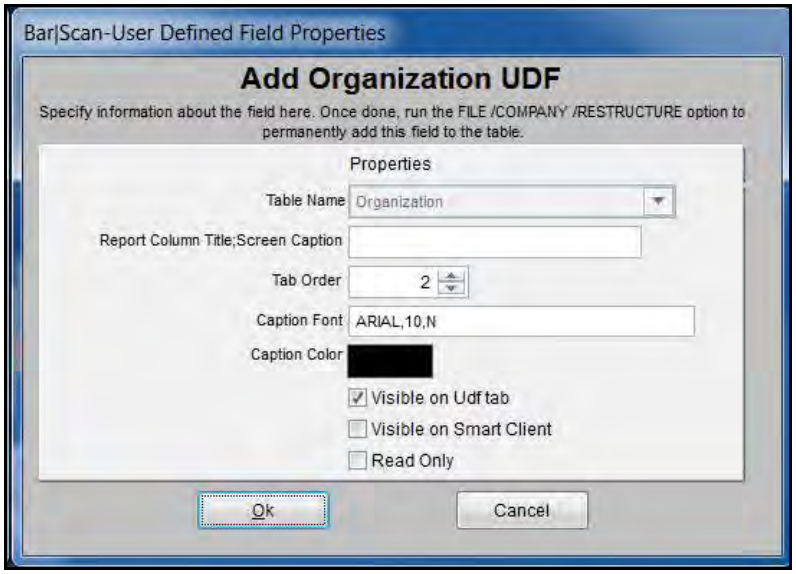
You can add additional shapes and captions to improve the organization and readability of your UDF Panel. These are design elements only and have no effect on the data. To Add a new Shape, right-click on the grey area of the UDF Tab and select Shape as shown below.



There are several shapes to choose from. The most popular are the Rectangle and the Vertical Line. After you select your desired shape, you are presented with a new prompt as shown at the right.

The tab order is not important since the user will not be tabbing to a shape. The boarder width controls the thickness of the lines used to make the shape.

If you select Caption, then you are presented with a new prompt as shown below.

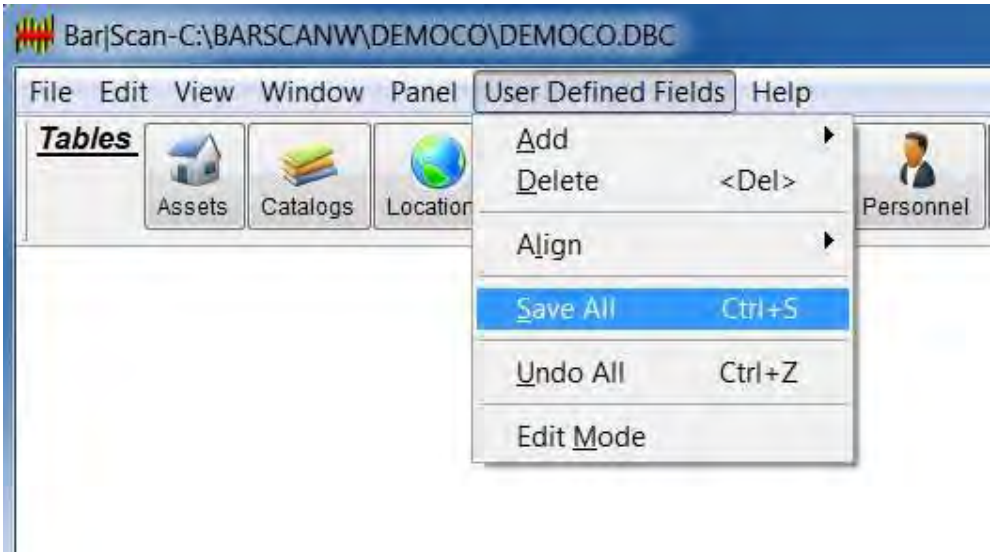


Captions are text displays only and have no effect on your data.

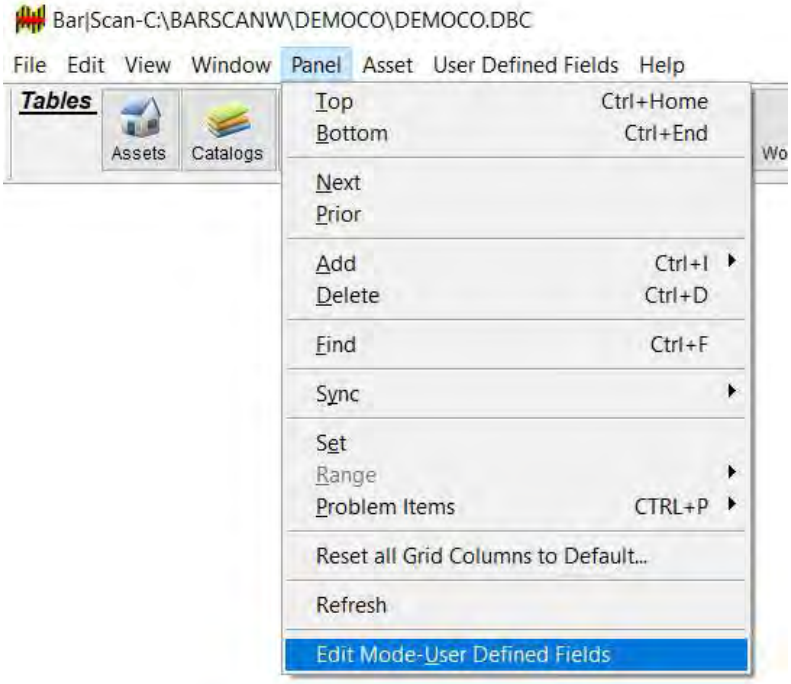
SAVING YOUR WORK

After you have selected the Ok button on the above window, you will have to Save your changes to the UDF tab.

From the Main Menu select User Defined Fields . . .▸, Save All as shown below.



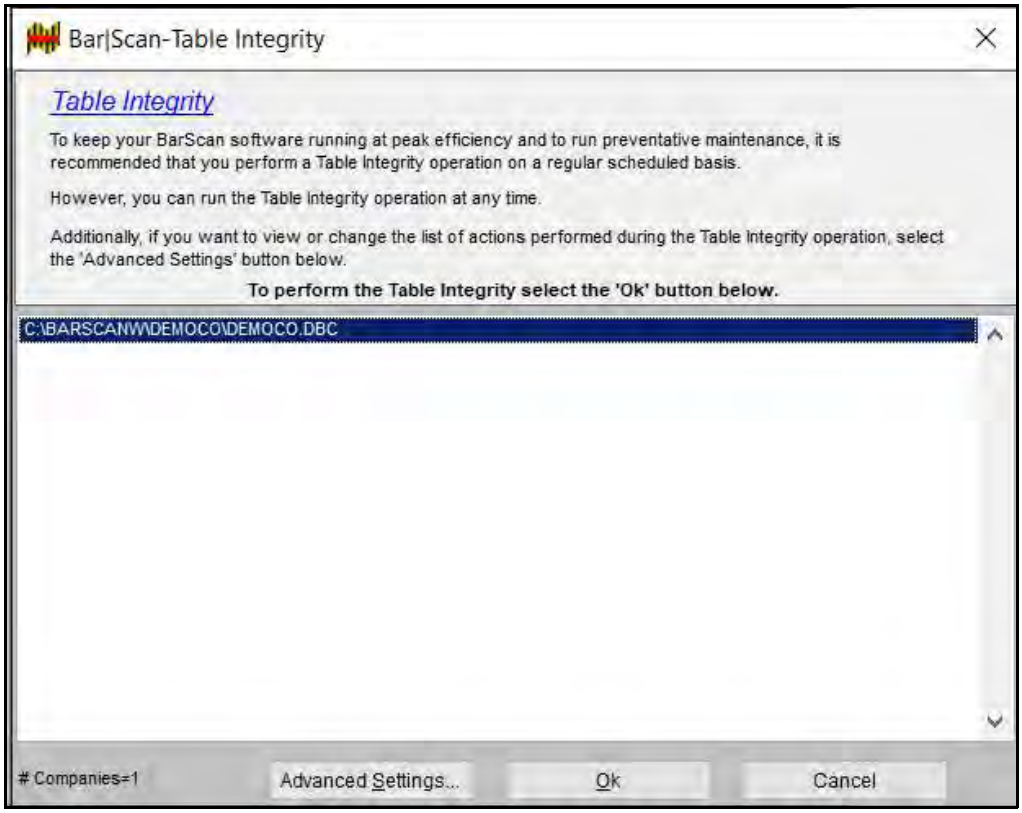
Then, to get out of the Edit Mode for the User Defined Fields, go to the Main Menu and select Panel . . .▸, Edit Mode-User Defined Fields as shown below.



You must perform a Table Integrity on this company before these changes will be permanent.

TABLE INTEGRITY

After you have created the UDF fields, even though they appear on the screen, you must perform a Table Integrity in Housekeeping before they will work. Below is the Table Integrity screen.



IMPORTANT POINTS ABOUT USER DEFINED FIELDS

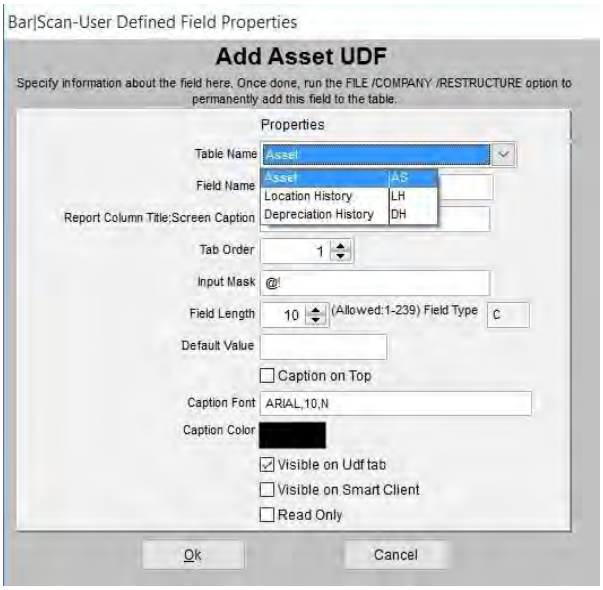
There are a couple things that you need to remember.

1. You CAN change the size of any Location History field. This is done on the Asset Table UDF Panel. Don't forget to also change the size on the Location Panel. In most cases, this is easier to do by using the Company Settings Screen, Key Fields tab.

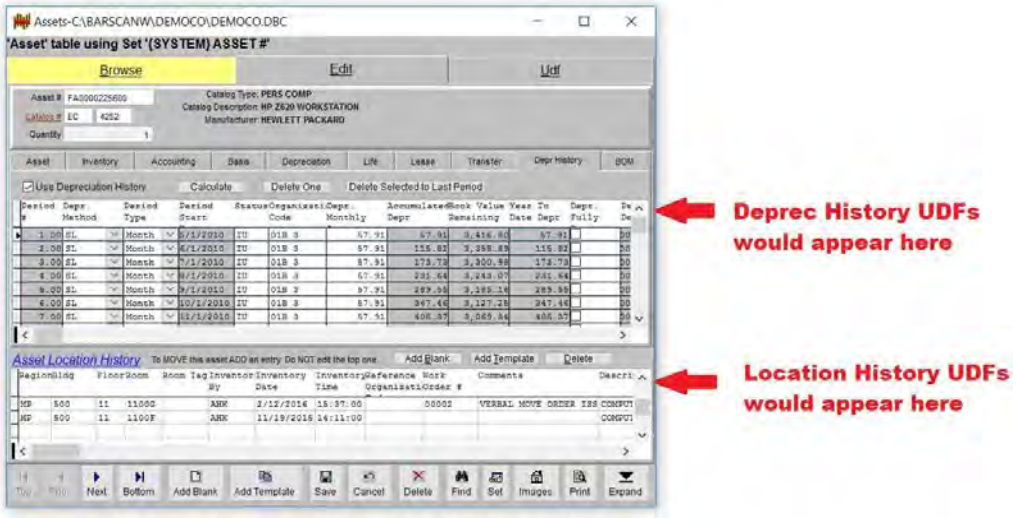
2. If you make a UDF in the Transaction table, you MUST add or change an EQUAL and LIKE UDF in the Asset table, and vice versa. If you do not do this, the information will be lost when you move the valid assets from the Transaction to the Asset Screen.

Bar|Scan will warn you about this when you save your new Transaction table UDFs and will automatically create it for you if you reply 'Yes'. We recommend that you reply 'Yes'.

If you add a UDF to the Asset table to stretch the name field, you need to also add an exact copy of that UDF to the Transaction table. Even if you do not plan to use the field in the other table, you must make a UDF for both. These two UDFs must be alike in every way, with the exception of the field in the Transaction UDF that states where you want the information from a Mobile Device field to upload to, which is discussed in the next section.



3. As shown on the screen to the right, when adding a UDF in the Asset table, you have three Tables to choose from. First, you have the Asset table but you can also choose to have UDFs added to the Asset Location History and the Asset Depreciation History as these are accessed from the Asset Panel. Lets see on the following screens where these UDFs will appear.



4. Stretching the size of a Bar|Scan field does allow you to enter more characters, but may not change the size of the display in the Bar|Scan table because of the Mask (formatting). In some instances, you may not be able to view all of the characters without placing your cursor on that field and moving your cursor to the right. The information will, however, print on a report. To correct this you can change the formatting.

5. UDFs can be displayed on the Browse Tab but they cannot be added to the Edit Tab, they can only be added to their own UDF Tab.

MULTIPLE COMPANY DATABASE

MULTIPLE COMPANY DATABASE FEATURE

The Multiple Company Database feature allows Bar|Scan to maintain as many independent asset databases as required by intensive users. We define intensive users as those with either a need for several databases, a large database that would be more effective if made into several databases, a large database that can be split between active and salvage (assets that have been disposed of), and/or a high level of activity.

The Multiple Database feature can serve both a single company with a large number of assets, typically 50,000 or more, as well as Bar|Scan Dealers who provide Bar|Scan services to their Clients as part of their support services, or warehouse managers with many clients.

The Multiple Database Feature creates a totally separate group of tables for each company *or* a mix of separate and shared tables.

Optionally, your Bar|Scan Dealer can advise you on how you can customize your system to have shared resources. Resources such as the Catalog table, Location table, Organization table, and Look up Windows can be shared across several databases. This is explained in more detail toward the end of this chapter.

When you have multiple databases, the Bar|Scan User Profiles are shared by all Companies that you create. However, a Master User can restrict any or all other users' access to various companies, according to the users log in. For more information on this feature, please see the User section at the end of this chapter.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

REASONS TO USE A MULTIPLE COMPANY DATABASES

Ease of Use

Intensive users of large databases may require the fastest possible processing speed and ease of use. By splitting up your database, work on each database can be accomplished faster. For example, queries and reporting will be faster and simpler.

The Multiple Database Feature allows a single computer to access more than one asset database. It is not Local Area Network "LAN" software. A LAN version of Bar|Scan can be purchased separately.

Partition Your Database

You may wish to separate your assets into logical groups with separate lines of responsibility. You may consider physically partitioning your asset database according to one or more criteria. For example, you could separate all equipment assets from furniture and fixtures. Other means of separating the database could be according to:

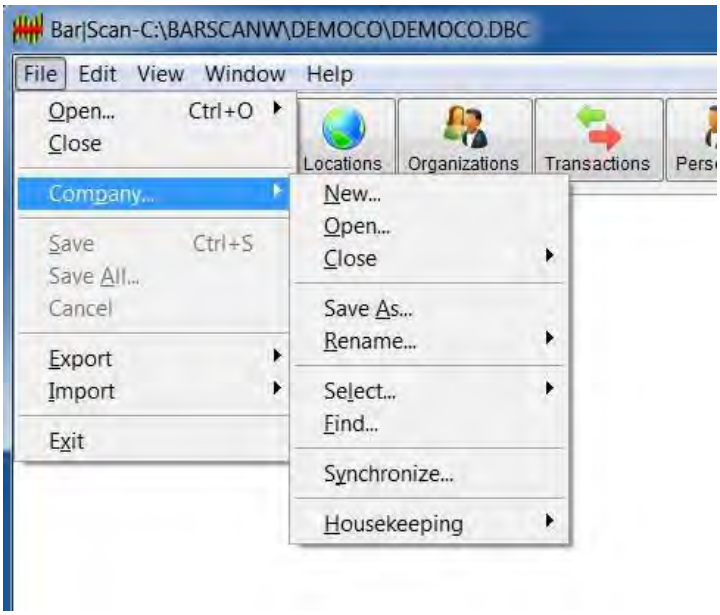
- ✓ Organizational ownership.
- ✓ Location, if your company is dispersed among several buildings or regions.
- ✓ Other logical methods that do not interfere with the way your company would take a physical inventory. All of the current Mobile Device models can update more than one database with an upload.

Use of Bar|Scan In a Service Capacity

Bar|Scan Dealers who provide Bar|Scan services to their clients as part of their Facility Management support services utilize the Multiple Database feature to maintain ongoing projects. Because of the ability to import Catalogs from one company to another, separate Catalog tables can be developed for each furniture line that the Dealer provides. Bar|Scan Dealers are specially trained in project applications of Bar|Scan. Individual companies are trained to maintain only their assets and are NOT encouraged to provide Bar|Scan services to others. Bar|Scan, Inc. will not provide technical support for these companies.

USING THE MULTIPLE COMPANY DATABASE OPTION

If you have not purchased the Multiple Company version of Bar|Scan, and have only a single company version of Bar|Scan, you cannot access the File . . . ▸, Company . . . ▸, New feature, nor can you access the File . . . ▸, Company . . . ▸, Save As feature. You have the ability to access one company. You may change the name of that company, and the drive or path where it is stored, but you cannot create a new company.



As discussed in the beginning of this Chapter, the Multiple Database Feature allows Bar|Scan to maintain as many independent databases "or companies" as required, subject to the amount of disk space on your computer.

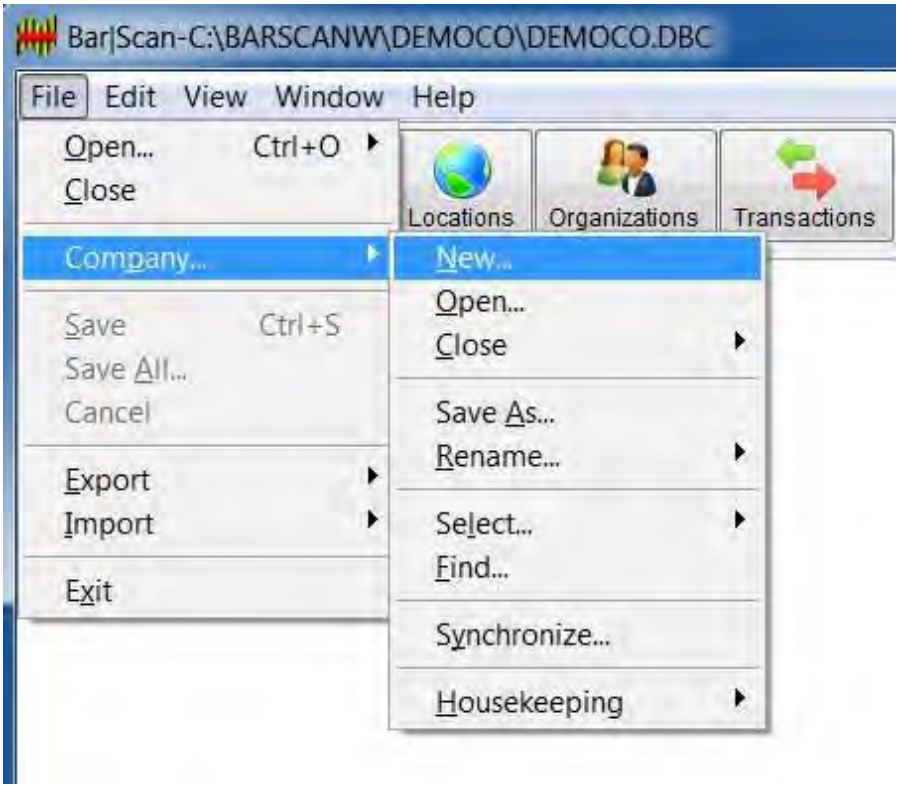
Once you have more than one company in your system, you have the ability to open more than one company at a time, and compare tables. For instance, you can access two companies, and open both of their Catalog tables side by side.

Important: Both the Single Company and the Multiple Database version of Bar|Scan allow you to open the same table in the same company several times. For instance, you can put several screens of the same Catalog Table side by side as long as it is the same company.

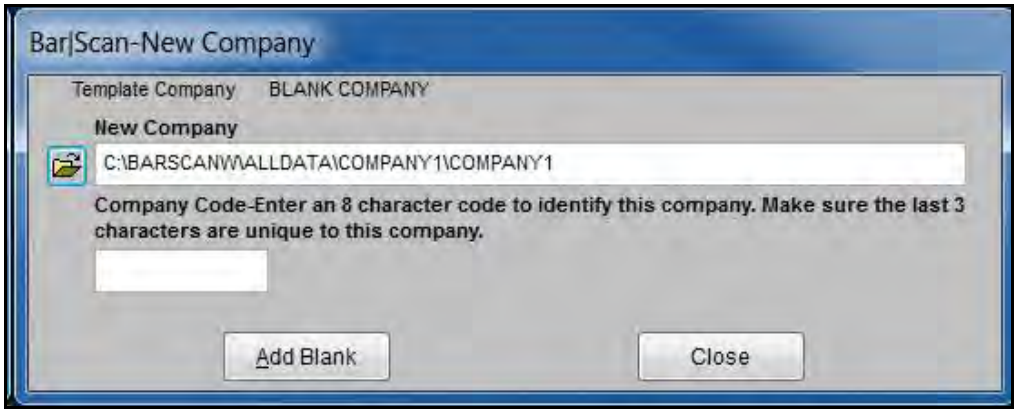
Adding a Company - The New Feature

This feature is not available if you are using a Single Company Bar|Scan system. It is only available in the Multiple Database version of Bar|Scan.

When you have the Multiple Database Feature, you can select File . . . ▸, Company . . . ▸, New, and add your new company.

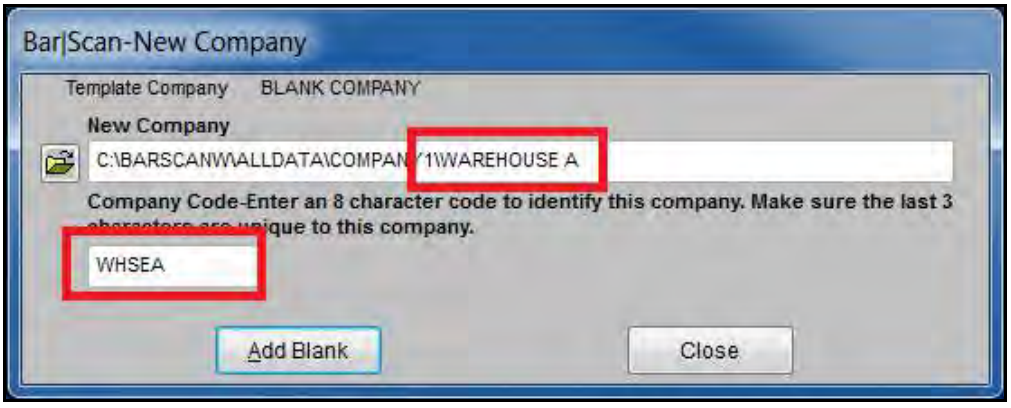


When you select File . . . ▸, Company . . . ▸, New, you will be shown a dialog box similar to the one below.



This dialog box allows you to name your new company by editing the path shown above, or you can select the open folder button to browse to the path you would like to use.

Once the edits are complete, as shown in RED, the path that you select is shown, you can select the Add Blank button.

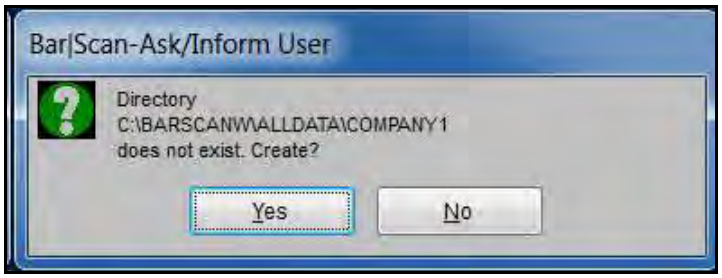


The path that you select and the name of your new company will vary from the one shown above.

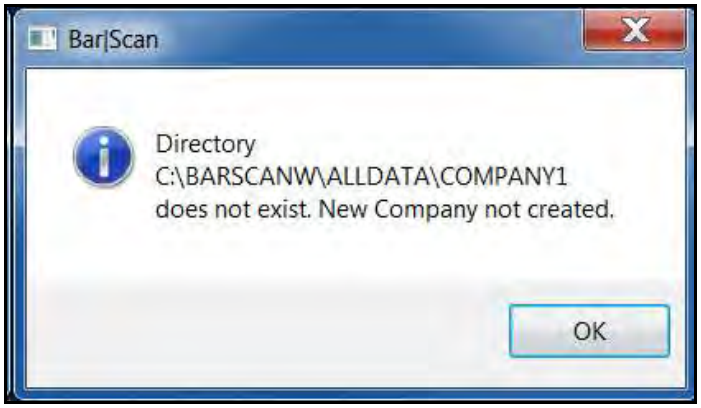
In the previous example, we have named the new company "Warehouse A". Each company also requires a unique code, up to eight characters, to identify the company to the Mobile Device. This code is only used when you prompt the Mobile Device for "Company". If you never plan on uploading one Mobile Device to several Company's Transaction Tables, you will not need to remember this code.

The "Company" prompt in a Mobile Device is useful in a warehouse environment, where the assets in storage belong to several customers and you wish to keep each Customer's data in separate companys.

When you select the Add Blank button, you will be shown another dialog similar to the one below.

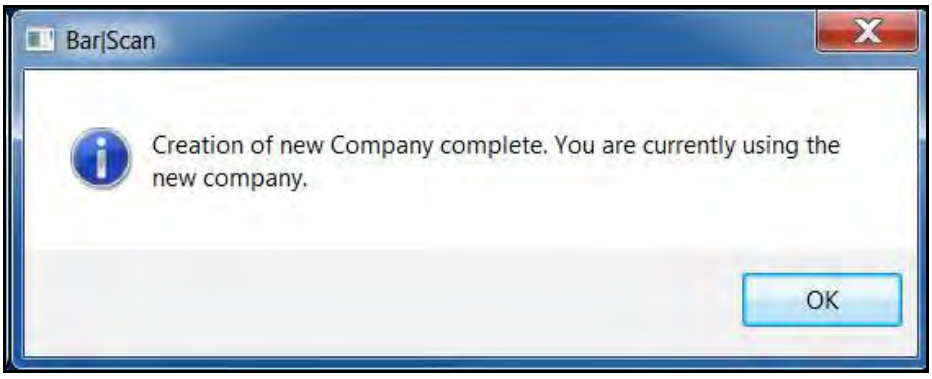


The dialog in the above box will vary, according to the path that you have chosen for your new Company, but should be similar to that shown. If you select No, you will see a dialog box similar to the one below.



This dialog appears to let you know that you cannot create the new company without creating the directory. When you select the Ok button, this dialog will disappear, and you will see the Main Menu.

If you had selected Yes, to create the new directory, Bar|Scan will create the new directory, and the new company for you. You will be shown a dialog box similar to the one below.

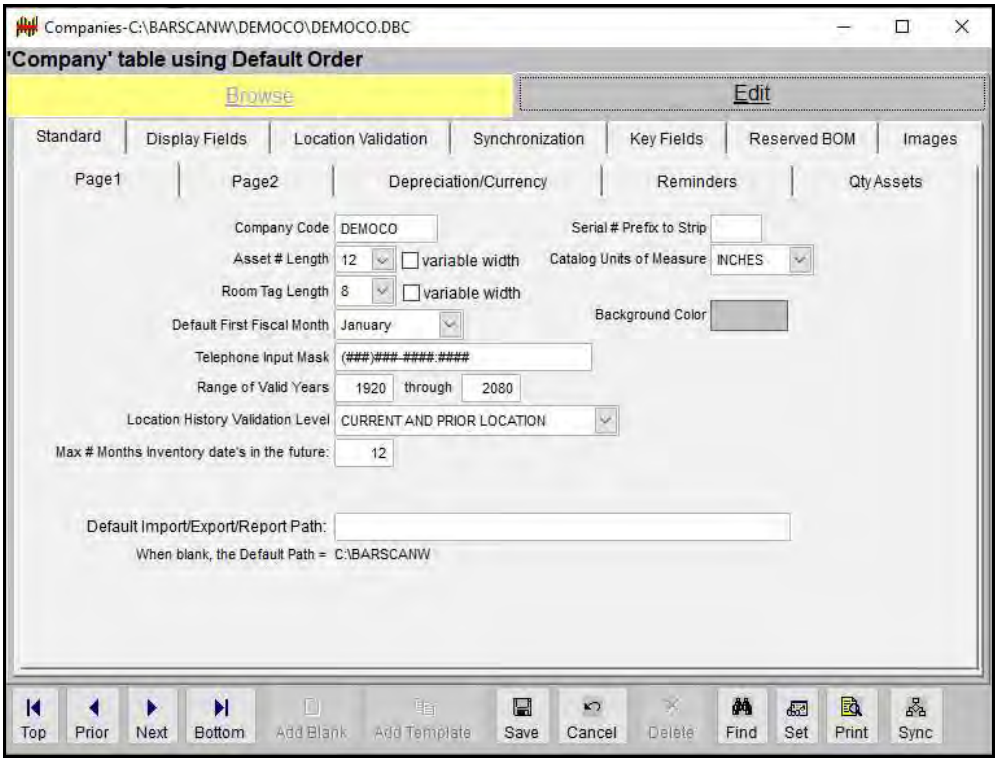


Notice that the above dialog box tells you that you are currently using the new company. The new company has been created, but you are not done setting it up.

Note: Each company that you create must be placed in its own subdirectory. You cannot have more than one company in a subdirectory.

You should go to Settings, and finish setting up your new company. You can get to Settings by selecting File . . . ▸, Company . . . ▸, Housekeeping . . . ▸, Settings as shown below.

You will see the Settings table similar to the one below.



You should read the items in this table, especially the items on the Standard Options tab shown above. Change any items that need to be changed, and save your changes.

Note: The most significant items to check are the Asset # Length and the Room Tag Length. These fields should display the number of human readable digits that are displayed on your bar code labels. If you are not using Room Tags, you may leave the setting at the default length of eight characters.

Page 1 - Company Code

A Company Code is required for each company entered into the Bar|Scan system. The Company Code is used only for password and Mobile Device sychronizing control. Each company must have a unique code.

Type in any numbers or characters to establish a company code. Spaces can also be used. Press the BACKSPACE or left-arrow key to edit your work.

When completed, press the TAB key.

Important: When a Mobile Device synchronizes information to the Transaction table, the Company Code will assist in directing the information to the correct company. If you have only one company or you are communicating with only the company that you currently have open, the Company Code in the Mobile Device can be left blank.

Asset # Length

Indicate the length of the bar code asset number that you will be using for this Company. Any number from 0 to 14 is acceptable.

The asset number length should already have been finalized before adding this company. See *Chapter 2 - Suggested Procedures* for more information on determining the asset number length.

Room Tag Length

Indicate the length of the bar code Room Tag number that you will be using for this Company. Any number from 1 to 8 is acceptable.

If you do not plan to use the Room Tag feature, enter the length of 8 characters.

As with the Asset Number length, the Room Tag length should already have been finalized before adding this company. If it has not, press ESC to abandon the ADD mode now.

Default First Fiscal Month

If you have the Accounting module, you may use this field to tell Bar|Scan the Default First Fiscal Month for your company. Click on the down arrow next to the field, and select the proper month.

Telephone Input Mask

The input mask that is shown in this field will allow you to enter the telephone number without having to press the parenthesis or the dashes.

You can change the input mask to a different format, but in most cases this is not necessary.

Range of Valid Years

Bar|Scan will only accept dates which fall within the Range of Valid years listed. The default settings are acceptable for most customers. This helps reduce the amount of erroneous data entry. If you are depreciating fixed assets such as land and other long term capital items, you may need to adjust these dates.

Location History Validation Level

Bar|Scan maintains a history of all of your asset inventories including manual changes. This asset location history is validated against multiple supporting tables such as the Location Table. If you have a high level of scan activity or have a large number of edits to the supporting tables, activities such as creating new Set Commands or performing a Table Integrity may take a long time, or you may just not be concerned with older location information. You can choose one of three amounts of validation that you wish Bar|Scan to perform.

Max # Months Inventory date's in the future

This option applies to the Inventory Date field and allows you to control how many months a future date can be valid. For example, you may wish to enter a future move into the Asset Table's Location History. This option controls how far in advance you may specify the inventory date.

Serial # Prefix to Strip

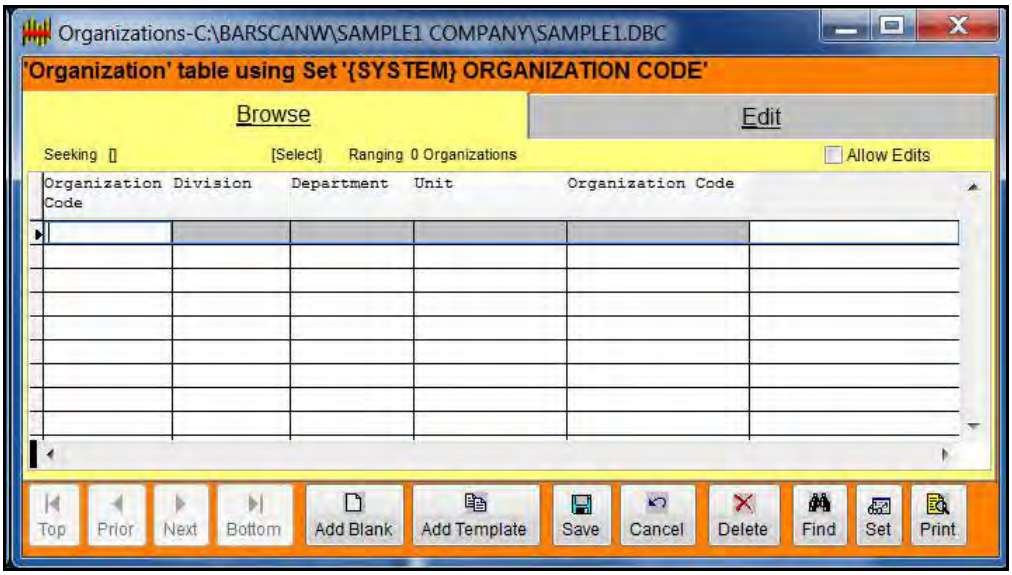
Serial numbers that are printed on the shipping labels of boxes often have a leading character(s) at the beginning of the actual serial number. Type into this field any leading charter(s) that you want Bar|Scan to ignore and remove. When the information is uploaded and validated, this item will make Bar|Scan ignore and remove the character(s) that you have typed into this field. This will allow you the option of scanning these serial numbers without opening the boxes. The Serial Number can only be stripped during an import of a Mobile Device File, or during the validation of an upload into the Transaction table.

Catalog Unit of Measure

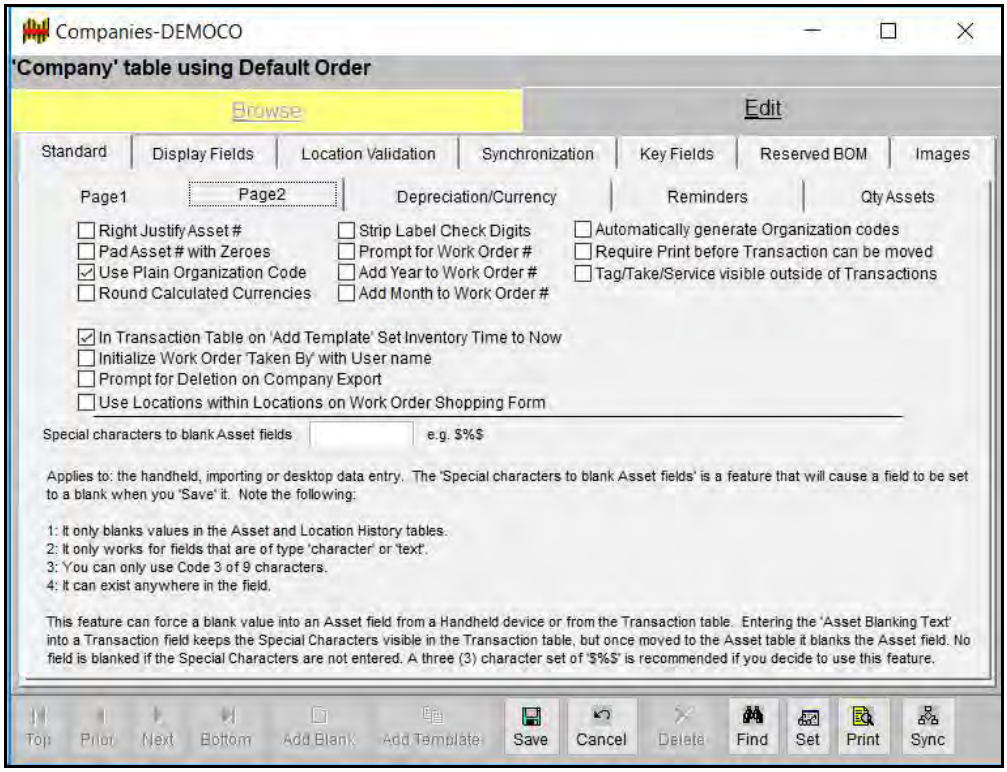
The Catalog Table defaults to Inches as the unit of measure for Catalog dimensions (width - depth - height). Should you require Metric unit of measure, this can be changed by selecting “MM” for millimeters.

Background Color

If you have several companies, you may wish to create a background color scheme for each of them. This will help distinguish each company. After selecting a color and pressing save, the color will appear the Table Toolbar as in the example below.



Selecting Page two will display additional settings as seen below:



Right Justify Asset #

Check this item only if your bar code asset labels have variable length asset numbers and you wish to append leading characters. If you wish to append trailing characters, respond "N."

Normally, right justify only if you have bar codes of various lengths.

Note: All asset numbers in Bar|Scan must be of the same length, even if the bar codes are various lengths.

Pad Asset # With Zeroes

This option works in connection with Right Justify Asset Number above. In most cases you will need to check this item, if you checked the item above.

For example, if you had one bar code label of five characters 00463 and a six-digit bar code label 000682, if you used this feature the first bar code label would be changed to 000463, and the other would stay the same 000682 (assuming that the asset number length is set to six).

Use Plain Organization codes

Normally, Bar|Scan's Organization codes are six characters long. Checking the Use Plain Organization Codes item allows you to enter any combination of letters or numbers, up to six characters in length. If you want to enter a simpler Organization code such as AP or 503, you could if this item is checked.

If you do not check Use Plain Organization Codes, Bar|Scan will allow only formatted data to be entered as follows: two numeric, two alpha, then two numeric.

Round Calculated Currencies

Check this option if you want Bar|Scan to round the currency figures up and down to the nearest whole dollar in all of the calculations.

Strip Label Check Digits

On occasion, Code 39 font has an optional check digit at the end to increase the scan accuracy. These can be stripped as they are not necessary for operation of Bar|Scan. Selecting the Strip Label Check Digits will strip this additional character from the Asset Tag or Room Tag fields.

Initialize Work Order 'Taken by' with User Name

Check this item if you use the Work Order module, and want Bar|Scan to automatically fill in the Taken By field with the initials that were used to log into the Bar|Scan program.

Prompt for Deletion on Company Export

When Ranging and exporting information from one Company to another, the information is copied from the source company to the destination Company and the item or Range of items remain in the source after the export. Check this item if you would like Bar|Scan to prompt you to delete the item from the source.

Prompt for Work Order #

Check this item if you want to manually enter the Work Order Number. Bar|Scan will prompt you for the Work Order Number, rather than assigning the next available number for you.

Add Year to Work Order #

Check this prompt only if you have not checked Prompt for Work Order #. Checking this prompt will make Bar|Scan add a four-digit year to the beginning of the Work Order Number that it is assigning.

Add Month to Work Order #

Check this prompt only if you have not checked Prompt for Work Order #. Checking this prompt will make Bar|Scan add a two-digit month to the beginning of the Work Order Number that it is assigning.

Note: If you have checked to add both the Year and the Month to the Work Order Number, the four-digit year will appear, then the two-digit month, followed by the sequential numbers for the Work Orders.

Automatically generate Organization Codes

Check this prompt if you would like Bar|Scan generate a numeric organization code. Once done, a newly added Organization entered in the Organization Edit screen will have a numeric organization automatically generated when saved.

Require Print before Transaction can be moved

Check this prompt if you would like Bar|Scan to require the user to print the items in the Transaction Table prior to moving them to the Asset Table. This provides a hard copy trail of your inventory. In order to move the Asset Table, Transactions that have not been validated or still have errors will need to be printed again once they have been corrected.

Use Locations Within Locations

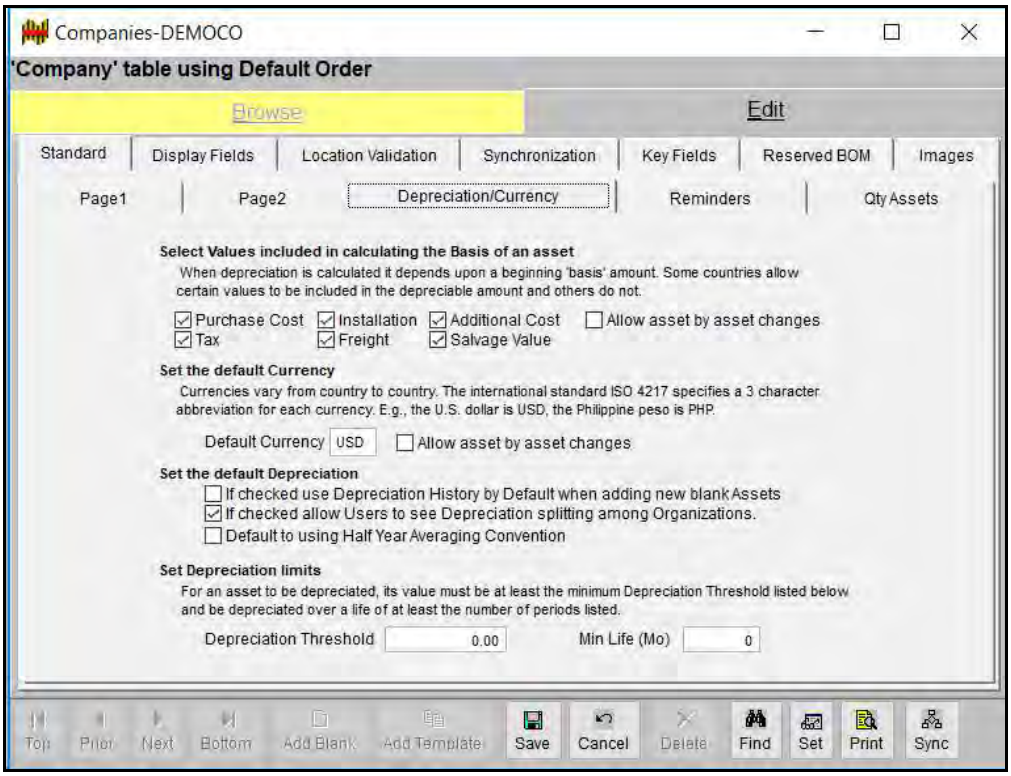
Use Locations within Locations on Work Order Shopping Form has a checkbox next to it. You only need to address this item if you are using the Work Order Shopping form. If you are using the Work Order Shopping Form, clicking on this item will allow you to specify partial locations. I.e., if you have a real location that is Region = CA, Building = 1900, Floor = 01, Room = 100, you could check this item and specify on the shopping form only Building = 1900, with no region, floor, or room noted, and it would be considered a valid location without adding it to the location table separately.

Special characters to blank Asset fields

By default, when Bar|Scan imports information either from a handheld or an external file or a keyboard, Bar|Scan does not overwrite existing data in a field with a blank. For example, if your handheld prompts for Purchase Order Number and you leave the response blank, whatever previously exists in the Asset Table will remain. In other words, by default, there is no process to remove data and replace it intentionally with a blank.

This option allows the intentional replacement of data with a black. The details on how this is accomplished is documented on the screen.

Selecting Depreciation/Currency will display additional settings as seen below:



This Tab contains settings that are useful for anyone who depreciates assets in multiple currencies as well as those who might require more depreciation settings. For example, if you have some assets in the United States and other assets in Canada, you can depreciate them in the local currency.

This feature can also be used to change the Default Currency to a currency other than United States Dollars. This does not mean that the assets can be depreciated in multiple currencies.

The multiple currency feature is not activated until you check “Allow asset by asset changes”.

Contact your Accounting Manager or review Chapter 13 - Housekeeping for more information. The remaining tabs including the Location Field Validation and Key Field Lengths Tabs are also discussed in Chapter 13- Housekeeping.

Once you save your changes, you will be shown a dialog box similar to the one below.

As the dialog indicates, you must immediately close all tables and perform a Table Integrity which includes a restructure. Once the Table Integrity has finished, your new company is ready to use.

OTHER MULTIPLE COMPANY FEATURES

There are more features to the Multiple Company system that are explained below. These features can be reached on the Main Menu.

The Close Feature

To use the Company Close feature, go to the Main Menu choose File . . . ▸, Company . . . ▸, Close, and then from the drop down menu, choose the desired company, or select All (to close all open companies).

The Save As Feature

This feature is only available on the Multiple Company version of Bar|Scan. This is used when you have a company open, and wish to save it as a different company (and company folder), virtually saving a copy of the entire folder, under a new name. Caution should be used when using this feature.

The Rename Feature

This feature is used to rename a company. Caution should be used when using this feature.

Selecting a Company

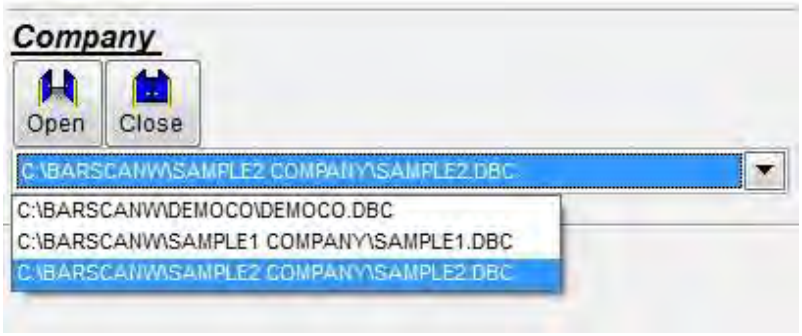
Because you may have changed the drive that your Bar|Scan company is on, you have the ability to access the Select feature in Bar|Scan, whether you have the Multiple Company Database or not.

To access the Company Select feature, go to the Main Menu choose File . . . ▸, Company . . . ▸, Select, and then from the drop down menu, choose the desired company.

The Company Toolbar

You may use the Company toolbar to open or switch between companies. To add the Company toolbar to the Main Menu, go to the View feature (on the Main Menu), and select Toolbars, and then select the Company toolbar. The Company toolbar is shown below.

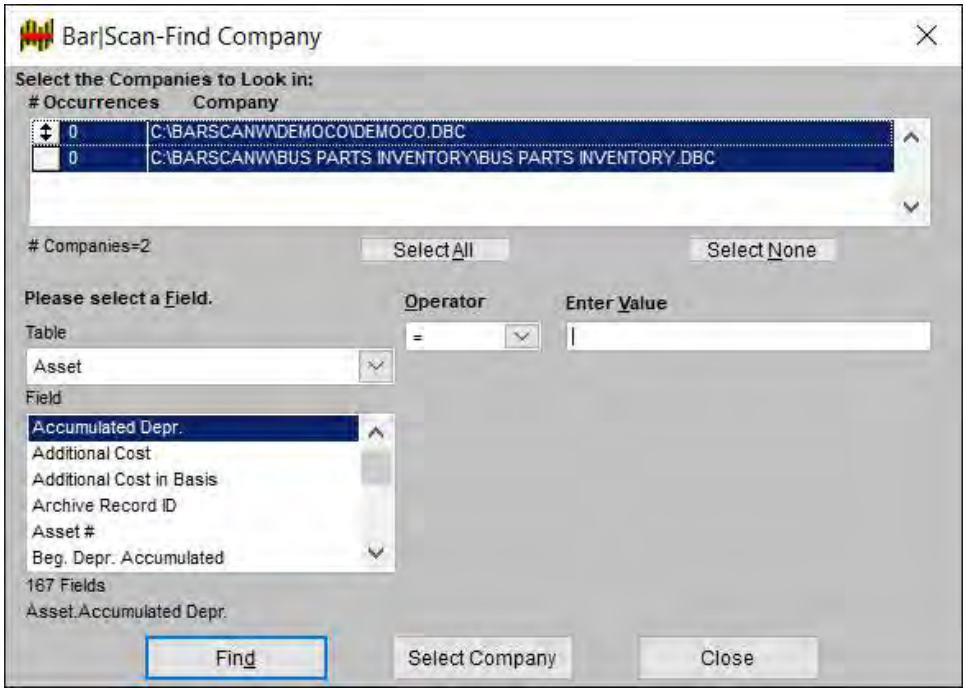
You may use the two icons shown here to open a company, or to close the close the company that is shown in the field immediately below the icons. If you have more than one company open, you can activate the other company by selecting the down arrow, and highlighting a different company as shown below.



If you often switch between different Companies in your Bar|Scan system, this toolbar can save you a lot of time.

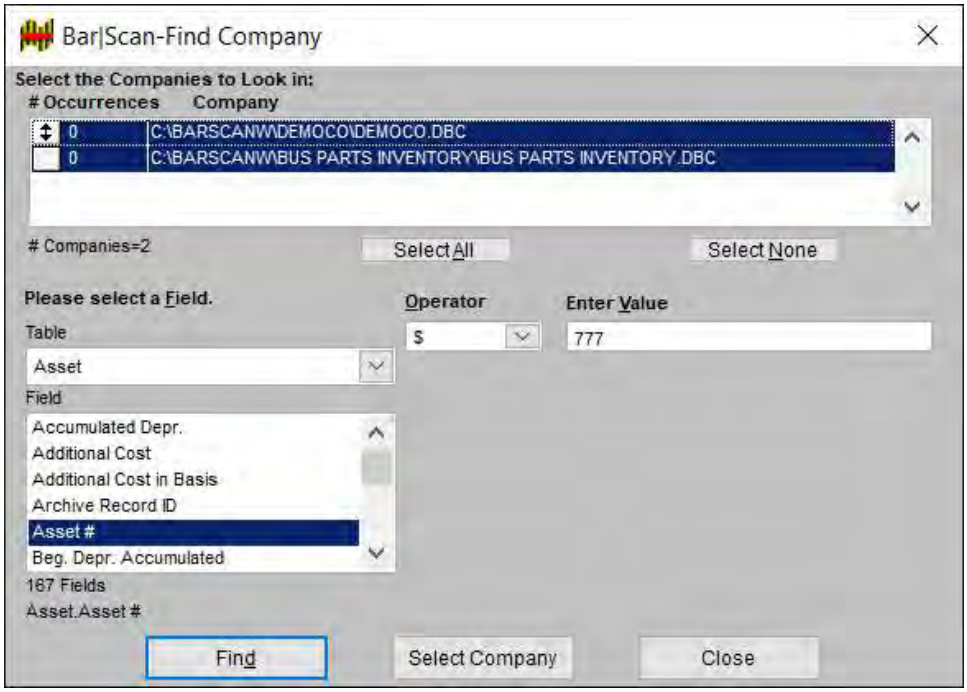
Find Company

The Global Find feature is also listed under File . . . ▸, Company . . . ▸, Find. When you select the Find feature, you will see a new window which is shown below.



Using this feature will allow you to search for specific items within one or more of your companies. This can be useful if you have only limited information, e.g., a serial number, and many companies to search in.

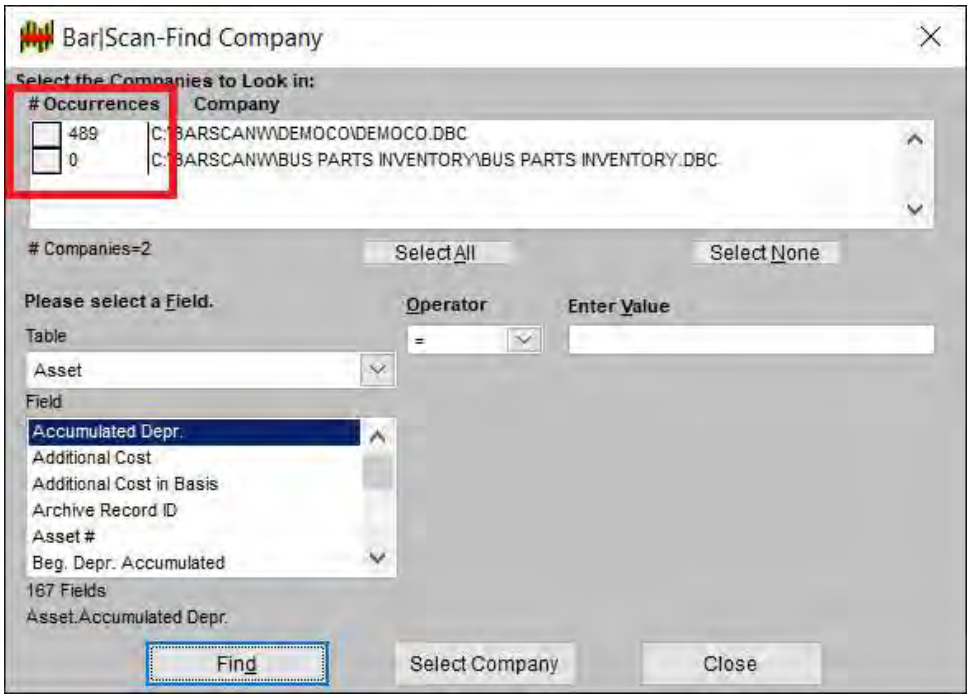
If you have more than one Company, and have more than one Company open when you select the Find feature, all of the companies that you have open will be displayed. In this manner, you can search for items in the Company of your choice, or choose to search for an item in all of the companies that you have open as shown below.



Choose the Select All button, to look in all of the companies that are listed in the companies box. Or, if you want to search for an item in only one of the companies listed, you can highlight that company with your mouse, and choose the Select Company button.

To find an item, select the table that you would like to search in, then select the field that you would like to search for. Then fill out the operator and the value information, and click the Find button.

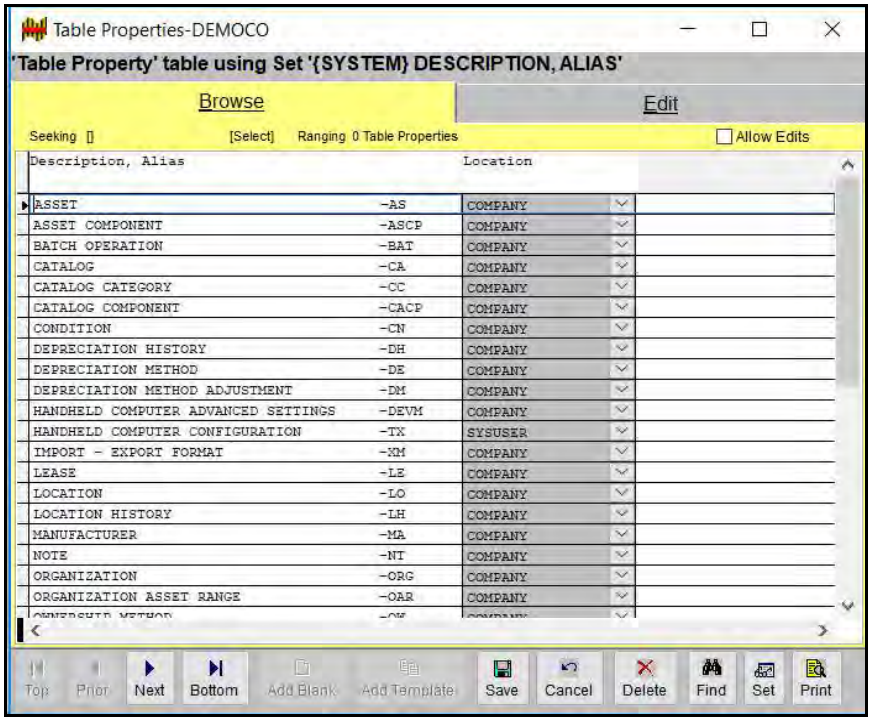
Once Bar|Scan has searched the respective database(s), the number of items that it finds will be displayed next to the respective company.



To view the items that Bar|Scan has found, if any, you will need to go to that specific Company and look for that specific information.

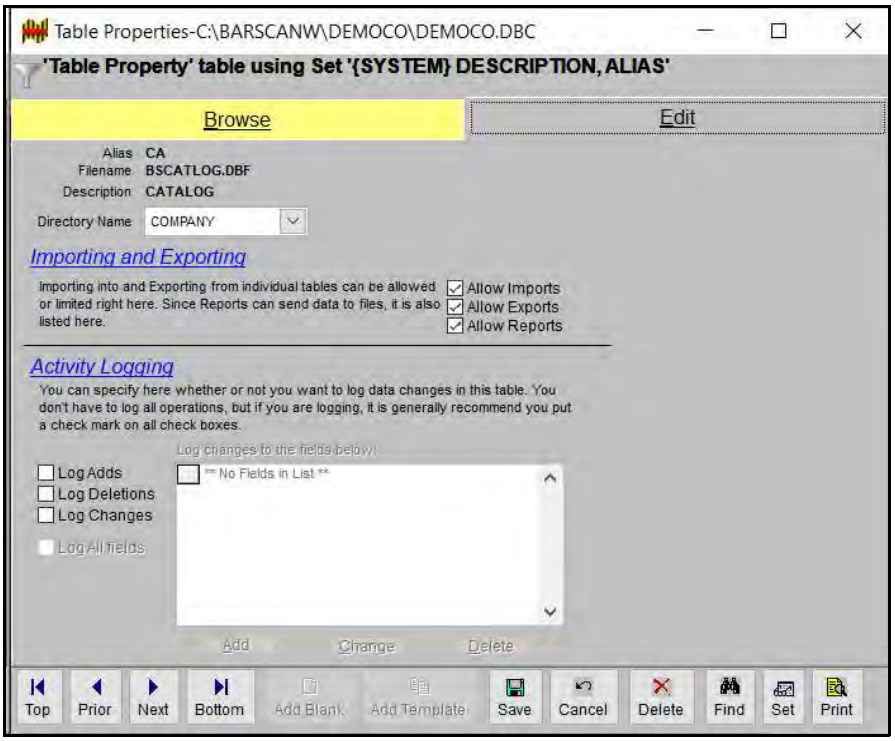
TABLE PROPERTIES

In order to make changes to the default Bar|Scan installation, there is a Table Properties table. When you need to access this feature, go to the Main Menu, select File . . . ▸, Open . . . ▸, Table Properties, and you will see a Browse Panel like the one below.



The first column is labeled Description. The information listed in the Description column is the name of the table. The second column, Location, lists whether the information for the table is listed in the \Company folder (not shared) or the \Sysuser folder (shared).

Select a table from the ones shown on the Browse tab, and then select the Edit tab, and you will see a tab like the one below.



By selecting the Directory Name field, you can specify where the information is stored. You may select to store the information in the Company, or in the \Sysuser directory. By storing the information in the Company, only that Company can use the information. By storing the information in the \Sysuser directory, you are sharing the information with any other Company that also stores their same table in the \Barscanw\Sysuser directory.

For instance, if you want to share Catalogs between two Companies, both Companies should specify the Sysuser directory as the directory where they want to store their Catalog table. In this manner, each Catalog that you add in either Company will appear in the Catalog table for both.

The Catalog is only one example of tables that can be shared.

In summary, There are three item you must decide on prior to setup of a new company database.

The first is what Tables do you wish to share. You have to make this decision independently for each database that you wish to create. Typical Table choices for sharing are:

Location Table
Organization Table
Catalog Table
Catalog Category
Manufacturer Table

The second item to consider is if you want to duplicate the UDF fields or not. Again, you have to make this decision independently for each database that you wish to create.

The third item is if you want to use the Bar|Scan SmartClient for other databases.

Lastly, if you plan on creating many Companies with shared tables, custom reports, User Defined Fields, etc., consider modifying the BarScan Template Company first. Then using the Company-> Save As menu item to copy this company. Is this way you will reduce the amount of work needed.

Bar|Scan® Smart Client

INTRODUCTION

The Microsoft ClickOnce deployment technology makes the Bar|Scan Smart Client application installation easy to distribute throughout your network using Internet Explorer or Microsoft Edge. It can also be deployed outside of your network via the Internet. The user navigates to a web page which is provided by the Bar|Scan Smart Client installation and hosted on your web server. The user then selects the 'Install' button. They are then asked for installation permissions. The Bar|Scan Smart Client then installs on their desktop with all of the required prerequisites.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

Once the Bar|Scan Smart Client is installed, the user can start the application any time from their 'Start' menu or desktop shortcut without accessing the web page again. Updates are also easy to distribute. Once installed, any new version of the Bar|Scan Smart Client can be placed on your web server and are automatically deployed to your user groups.

Administrator requirements:

The Bar|Scan Smart Client is an augment to the Bar|Scan Asset Management System which must be previously installed. The Bar|Scan Smart Client shares this database with the main Bar|Scan application.

Your Administrator will need to setup two components on your website, one for the Bar|Scan service, the other for the Microsoft ClickOnce distribution. Each of these require a separate virtual directory, one pointing to the Bar|Scan Service and the other to the ClickOnce files.

Bar|Scan, Inc. has a separate Bar|Scan Smart Client Installation Manual to assist your Administrator.

FIRST TIME USE

When you click to or enter the internet address of the Bar|Scan Smart Client in Windows Explorer you will be presented with a screen similar to the following.

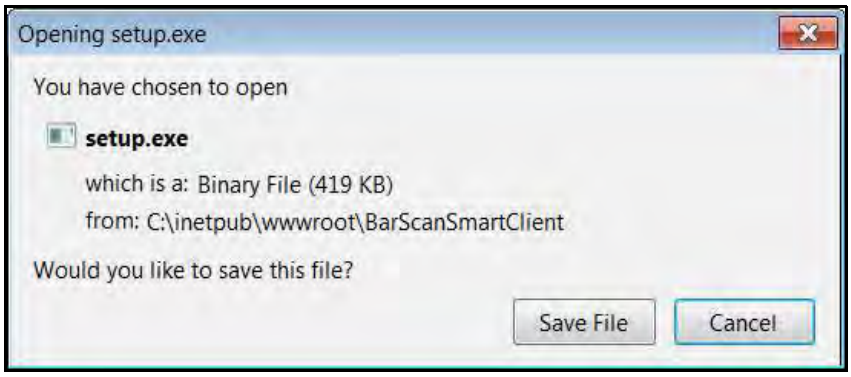
If you already have the .NET Framework installed, you can press the 'launch' hyperlink as shown in the example above to begin the Bar|Scan Smart Client.

If you do not have the .NET Framework installed, select the Install button.

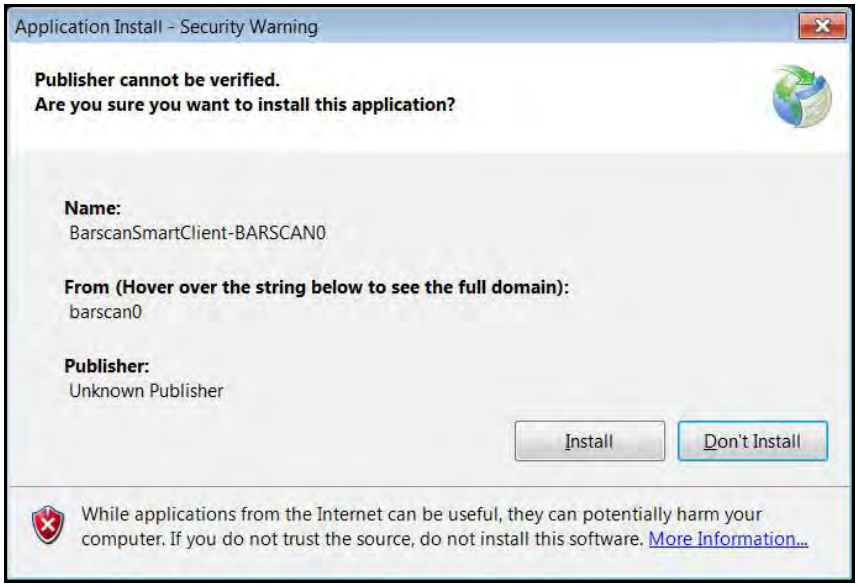
Microsoft supports other Browsers unofficially. You will have to test your preferred browser, if you are not using Windows Internet Explorer.

If you are not sure, press the launch hyperlink. If you see the following screen then you need to go back and select the Install button.

You may be asked to save the setup.exe file. If you see the following screen, select 'Save File'.

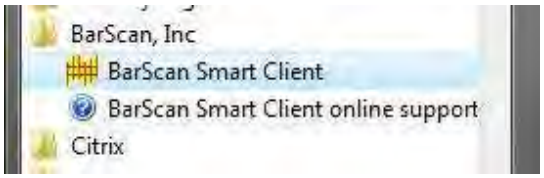


Once the .NET is installed, you will see the following screen.



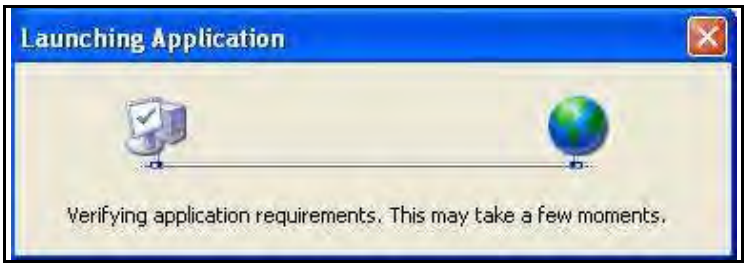
Select Install to continue the Bar|Scan Smart Client installation.

After the installation is completed, you can start the Bar|Scan Smart Client at any time by selecting it from your Start Menu as shown below.



You can also drag or copy a shortcut to your desktop.

When launched, the Bar|Scan Smart Client always begins with the following screen. The length of time that this screen is displayed is determined by your IT Infrastructure.



When the verification is completed, the Bar|Scan Smart Client Log In Screen will appear on your desktop.

You will also see a new shortcut to the Smart Client as shown below.

THE LOG IN SCREEN

When the verification is completed, the Bar|Scan Smart Client Log In Screen will appear on your desktop.

The default Log in is:

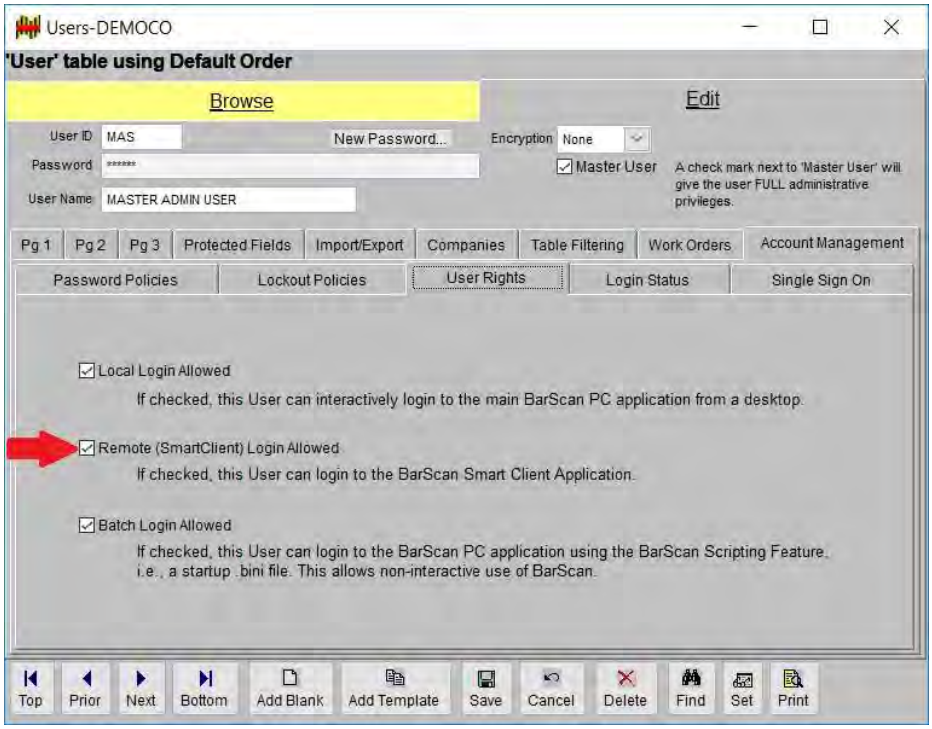
Customer Code: <blank>
Company Code: DEMOCO
User ID: MAS
Password: MASTER

Contact your Bar|Scan Administrator for the four login items that you will need to complete. Your User ID and Password may be the same as given to you to access the main Bar|Scan application as all passwords are stored centrally in Bar|Scan.

The Customer Code and Company Code do not necessarily have to match the corresponding codes in the Bar|Scan database.

The information is not case sensitive. When completed press the Ok icon.

If you receive the message "This account does not allow remote logins", it means that your password does not allow you to use the Smart Client. Contact your Bar|Scan administrator for further instructions. The settings for remote login are on the User Screen, Account Management, User Rights Tab as shown below.



THE MAIN MENU

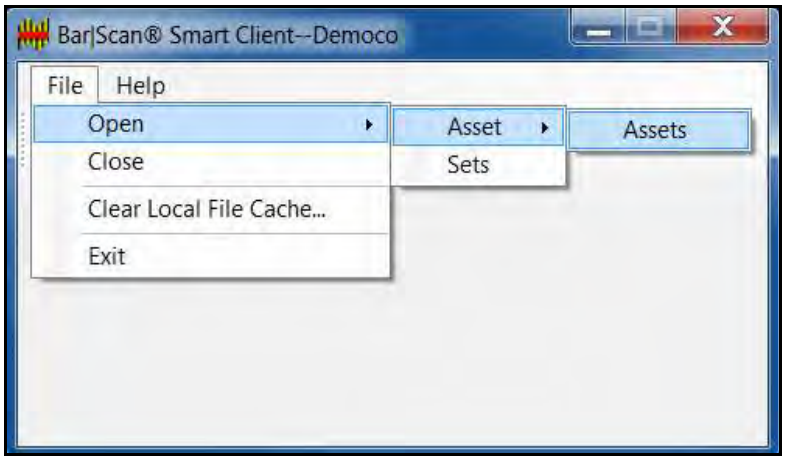
You are now presented with the Bar|Scan Smart Client Main Menu Screen similar to the one below.

The icons that display are dependent on which modules and version of Bar|Scan is installed on your server.

Immediately below the Title bar, the Feature Categories are listed. These Features Categories allow you to access all of the primary features of the Bar|Scan Smart Client.

As with most Windows compatible programs, simply click on the desired Feature Category, and a drop down menu will appear, listing the Features.

When you select File, you will see a drop down menu. You can select any of the Features that are highlighted, such as Open, Close, or Exit. Some of the Features have additional menus that will appear when that Feature is highlighted signified by an arrow (...▸) located to the right of the Feature, i.e., select File, then Open ...▸, then Asset ...▸, Assets.



The 'Clear Local File Cache' choice is used to clear up some data access and screen appearance problems. The Local File Cache is always cleared when you exit the Bar|Scan Smart Client.

When you select Help, you will see a drop down menu with the Help Feature. When selected, a panel similar to the following will appear.

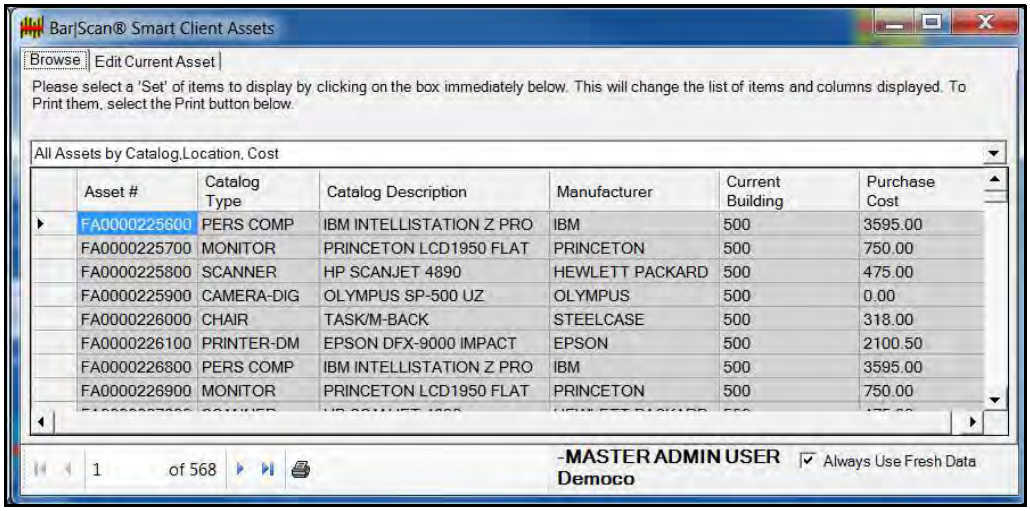
On this drop down, the Bar|Scan Smart Client support information is presented.

You may review our support terms at our website. Visit www.barscan.com and click on the Support Button.

Your Bar|Scan Administrator may also have a formal process for support of this software.

THE ASSET PANEL

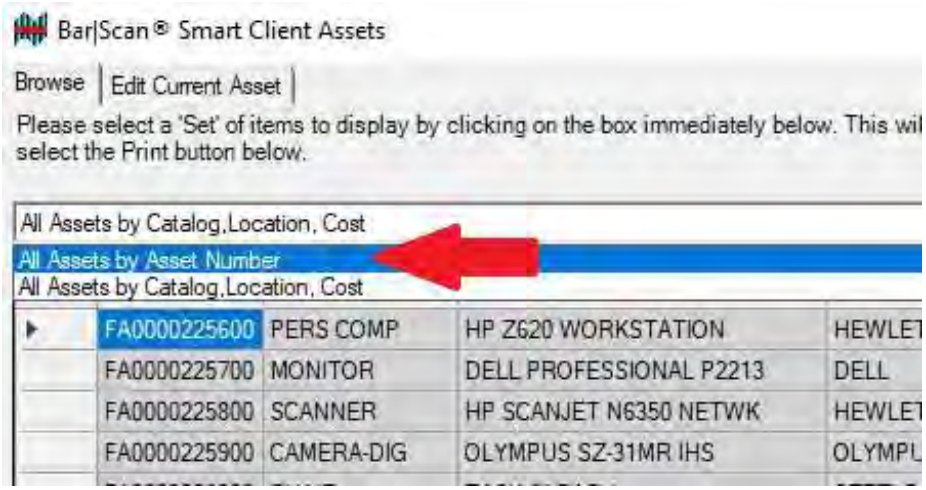
When you select File, then Open ...▸, then Asset ...▸, Assets or click on the Assets Icon, a panel similar to the following will appear.



In the above example, six columns are being displayed. To change the Sort Order, simply click on the Column Title. For example, to sort by Current Building, click on the light grey box above that column. The data will then resort.

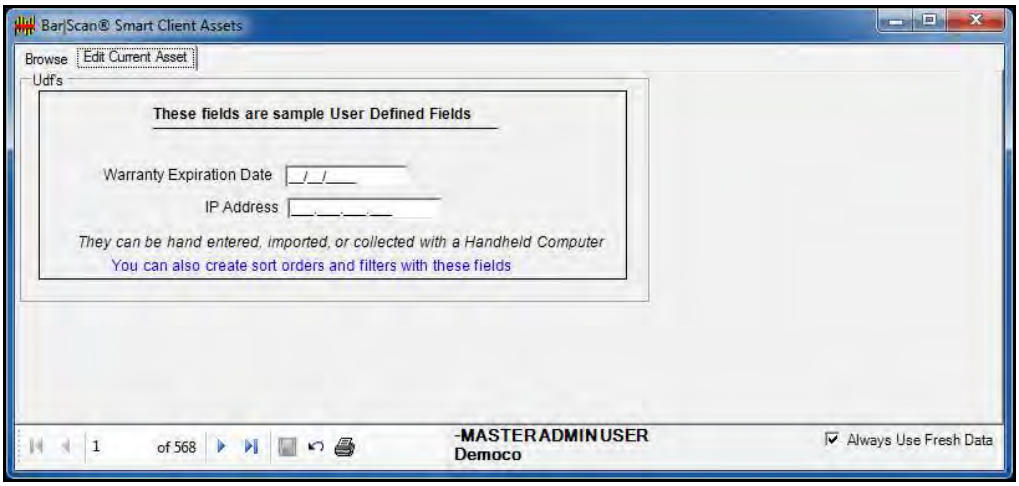
An arrow along the left side of the Panel indicates which asset you are editing. An example is shown below.

You can change the Filter and Columns that you wish to have displayed. This is done by selecting a new 'Set' as in the example below.



In this example, the asset information presented can be changed based on two different 'Set' commands. The list of 'Set' commands can be viewed by selecting the pull down button to the right of the bar.

To edit any individual asset record, select the record by clicking anywhere on the row followed by clicking on the 'Edit Current Asset' Tab. A Panel similar to the following will appear.



The asset fields that are displayed on your Panel are controlled by your Bar|Scan Administrator. Your Administrator can add, change and remove fields at any time.

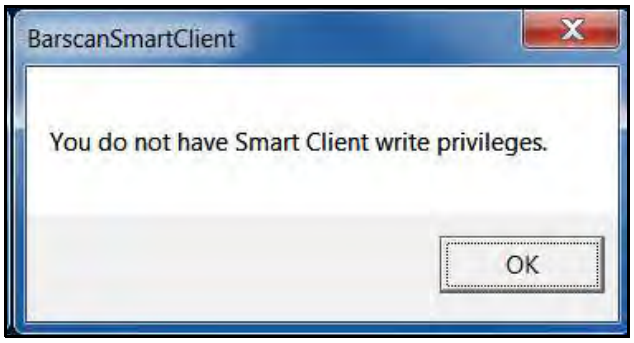
There is no Global or Mass editing feature available such as the Range Command in the Bar|Scan Application. Edits can only be made to one item at a time.

The Smart Client field widths cannot be adjusted. Sizing is done automatically by the browse component based on the width of the visible data in the column.

When the editing is completed, you need to press the Save (disk) Icon to save your work.

The Save and Undo Icons are displayed below.

If you encounter the following screen after pressing save, it means that either your User ID does not allow you to write data or you do not have the Read/Write version of the Smart Client installed.



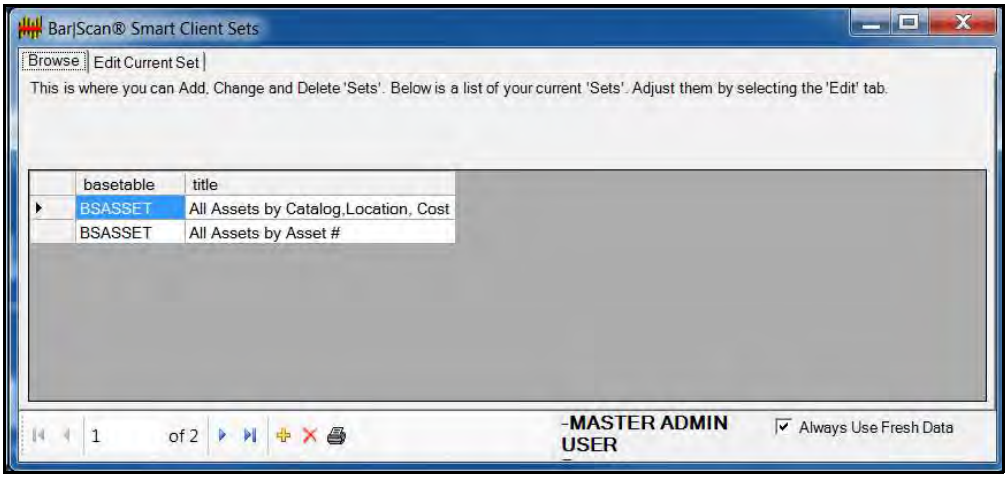
Contact your Bar|Scan Administrator if you believe that you are getting this message in error.

THE SET PANEL

Set is the most useful feature of Bar|Scan. It allows you to order, filter, and display any field related to assets in your database. You can add customized Sets to perform extensive review and editing quickly. Review the Set Panel carefully, it will be your most effective editing tool.

When you sort any of the information in any of your tables, you will be using the Set feature.

When you select File, then Open ...▸, then Sets or click on the Sets Icon, a panel similar to the following will appear.



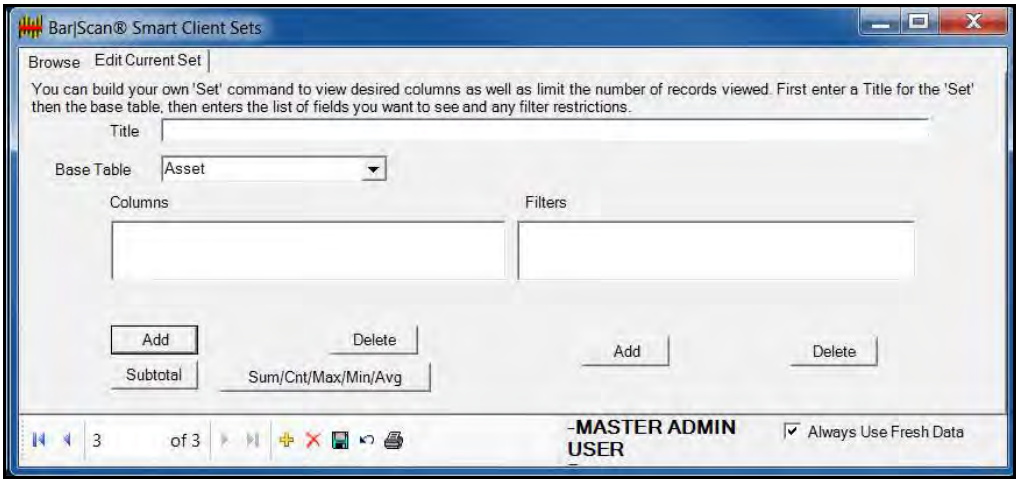
Sets in the Bar|Scan Smart Client are independent of and different than Sets in the main Bar|Scan Application. That is, when a Set is created in the Bar|Scan Application, it will not appear in the Bar|Scan Smart Client.

Sets are user based and not shared among different users. Therefore a Set that you create is not available for use by others. However, your Administrator can make Sets that are available for use by all other users. This is discussed in more detail in the Smart Client Installation Manual, section 14. Configuration Notes.

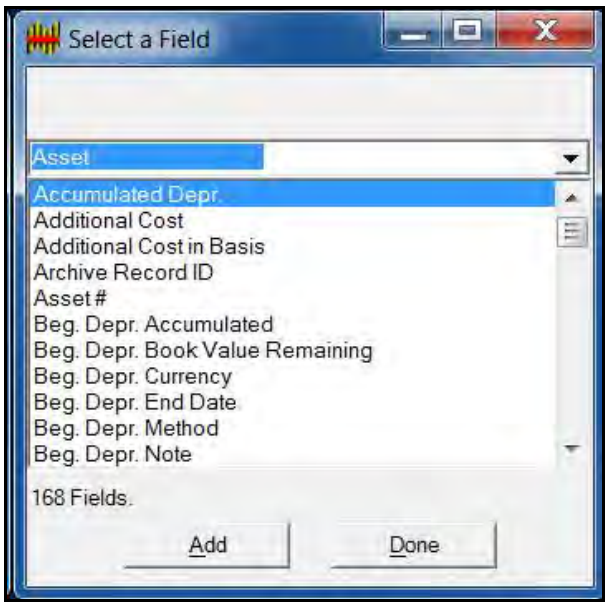
To create a new Set, you press the Add button on the Set Browse panel. The button is on the toolbar and looks like the following.

A new blank Set is create with no title. Now click on the 'Edit Current Set' Tab. A To edit any individual Set record, select the record by clicking anywhere on the row followed by clicking on the 'Edit Current Set' Tab.

A Panel similar to the following will appear.



You can select the Add button to begin adding columns and filters. A pop-up like the one will appear



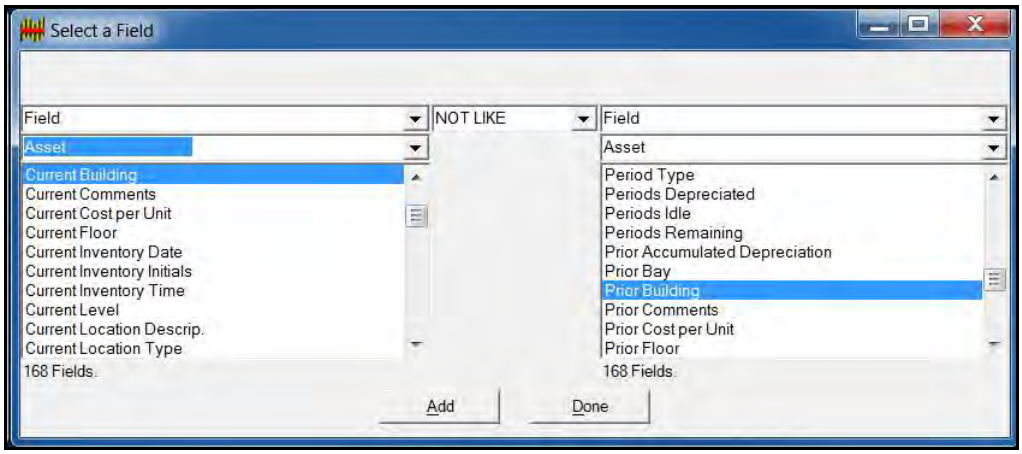
Notice that the 'Select a Field' pop-up has 2 areas. The top area has a pull down button like the example below to the right of the area. This is where you can change the Table from which to choose your fields.

Some fields that you would like to display are probably not in the Asset Table. In the example below we have chosen the Catalog Type, Catalog Description, and Manufacturer. All three of these fields are located in the Catalog Table.

Important: the order that you place the columns in the list is the alphabetical order that they will be displayed and printed in. To change the order, click on any of the column titles in the Browse Screen.

The filters that you create can be very simple like ‘Current Building = 500'. This will display all Assets that are located in your Building as of the last inventory.

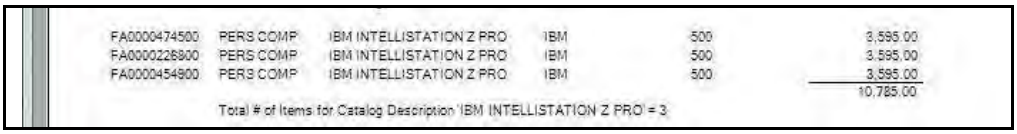
The filters that you create can also be more powerful. In the following example, the filter shows all Assets that are located in your Building as of the last inventory but were not there before.



Obviously, the filtering capability is quite robust making it useful to display only assets that are in your charge that are in locations relevant to you.

Finally, you can add subtotaling as well as Sum, Count, Max, Min and Average to your Set.

Common fields to subtotal include location, manufacturer, etc. Financial Fields will automatically total as in the following report example of subtotaling on Catalog Type:



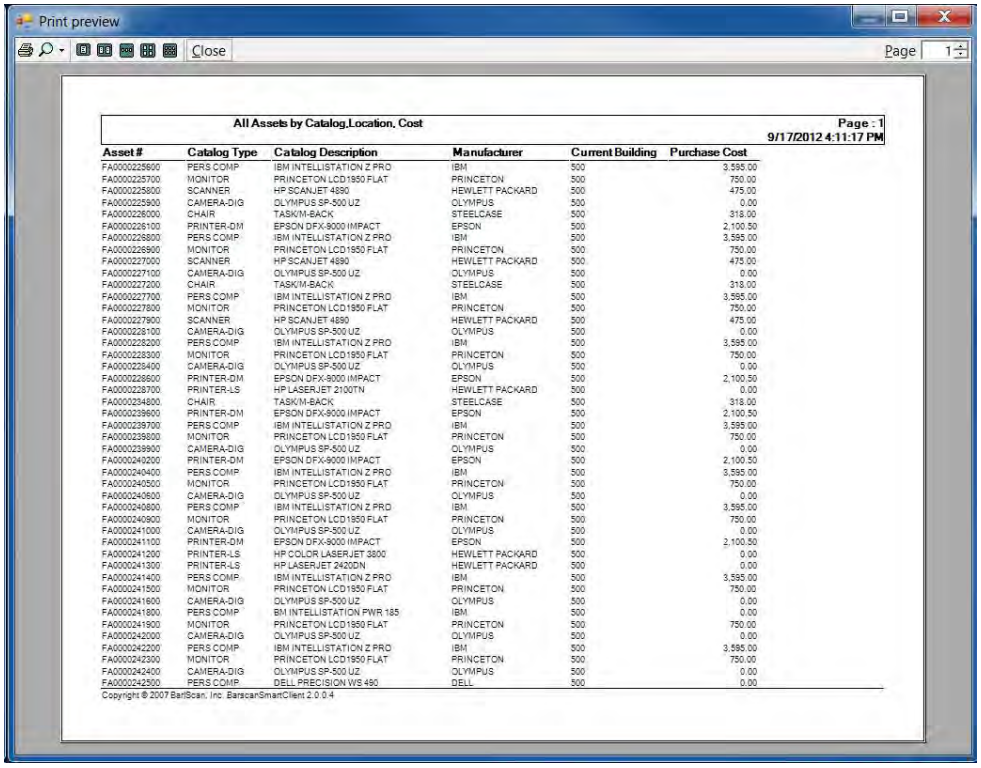
FA0000474500	PERS COMP	IBM INTELLISTATION Z PRO	IBM	500	3,595.00
FA0000226800	PERS COMP	IBM INTELLISTATION Z PRO	IBM	500	3,595.00
FA0000454900	PERS COMP	IBM INTELLISTATION Z PRO	IBM	500	3,595.00
					10,785.00

Total # of Items for Catalog Description 'IBM INTELLISTATION Z PRO' = 3

REPORTING

The Bar|Scan Smart Client can print reports based on your Set Commands. While not as extensive as the reporting capability in the main Bar|Scan Application, they are usually sufficient for most Smart Client users.

To create a report, first select the Set Command that defines your sort, filter, and fields that you would like to see on the report. Then press the Print button on the Asset Browse or Asset Edit screen.



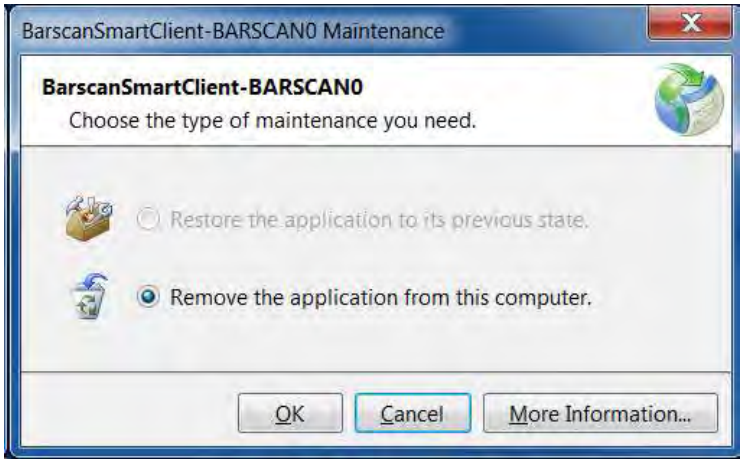
A Print Preview similar to the above will appear. You can now choose to print or abandon the report. The Smart Client can print preview up to 1,000 pages. However this will not affect printing.

As mentioned earlier, reports can contain subtotals. Subtotals are added in the Set Panel as described in the previous section.

DESKTOP UNINSTALL

The Bar|Scan Smart Client can be uninstalled from your desktop at any time. This is done by accessing the 'Programs and Features' within Control Panel in Windows.

Once you click on the Name 'Bar|Scan Smart Client' a window like the one below will appear.



Click on 'Ok' to remove the Bar|Scan Smart Client.

TRAINING WITH DEMO DATABASE

INTRODUCTION

This chapter is designed to help you better understand Bar|Scan in less time than reading the whole *Bar|Scan User Manual* by giving you an overview of many of its features. By going through this chapter, you will have more information available to help you make very important decisions regarding how you will be taking your inventory. The more you know about Bar|Scan and its available features, the clearer your implementation choices become.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

WHO SHOULD READ THIS CHAPTER?

This chapter addresses the needs of persons actually doing the physical inventory as well as operating the software. Unless you are directly involved with taking the inventory or operating Bar|Scan, you do not need to review this chapter.

If you are unfamiliar with Bar|Scan, you will also need to review *Chapter 5 - Operating the Bar|Scan System*, and refer to it in order to operate the software and proceed with the tutorial examples in this chapter. You may need to rely on the instructions in the other parts of this User Manual for the details on operating the software as well as the Mobile Device.

Before you proceed, we recommend that you read *Chapter 4 - System Overview*.

CHAPTER ORGANIZATION

The tutorial contained in this Chapter is divided into two sections. The topics they contain are different and distinct. You can review either part independently of the other. The following is a brief description of the contents of this chapter.

Section 1 - Demonstration Database Tutorial uses a real asset database to instruct you in how to use Bar|Scan. We suggest you familiarize yourself with this database before you begin working with your company's actual assets.

Section 2 - Mobile Device Tutorial provides instruction to demonstrate how to use the Mobile Device in conjunction with the Bar|Scan system.

SECTION - 1 DEMONSTRATION DATABASE TUTORIAL

OPENING BAR|SCAN WINDOWS

Double click on the Bar|Scan Windows icon, and you will see a window to Welcome you to Bar|Scan as shown below.

Please type your User ID and press <Enter>, then type your Password and press <Enter>. Then press <Enter> again, or click on the Ok button. You will then see the Bar|Scan Windows Main Menu.

If you have just installed your system, or if you have not been given your own User ID and Password by your Bar|Scan administrator, the default User ID and Password are MAS, and MASTER. Simply type *mas* in the User ID field, and press the Enter key. Type *master* in the Password field, and then press the Enter key. Then select the OK button by pressing Enter again, or click on it with your mouse. Bar|Scan Passwords are not case sensitive.

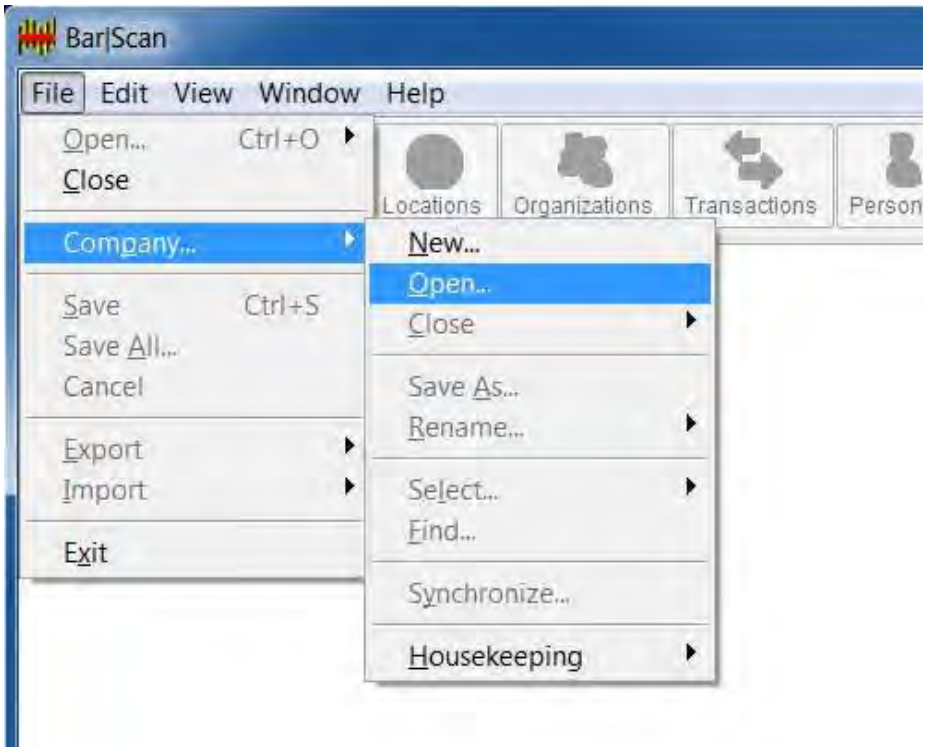
If you click on your Bar|Scan shortcut and are taken immediately to the Main Menu, then Single Sign On is enabled.

Note: The version number for the software is listed at the top of this screen, as

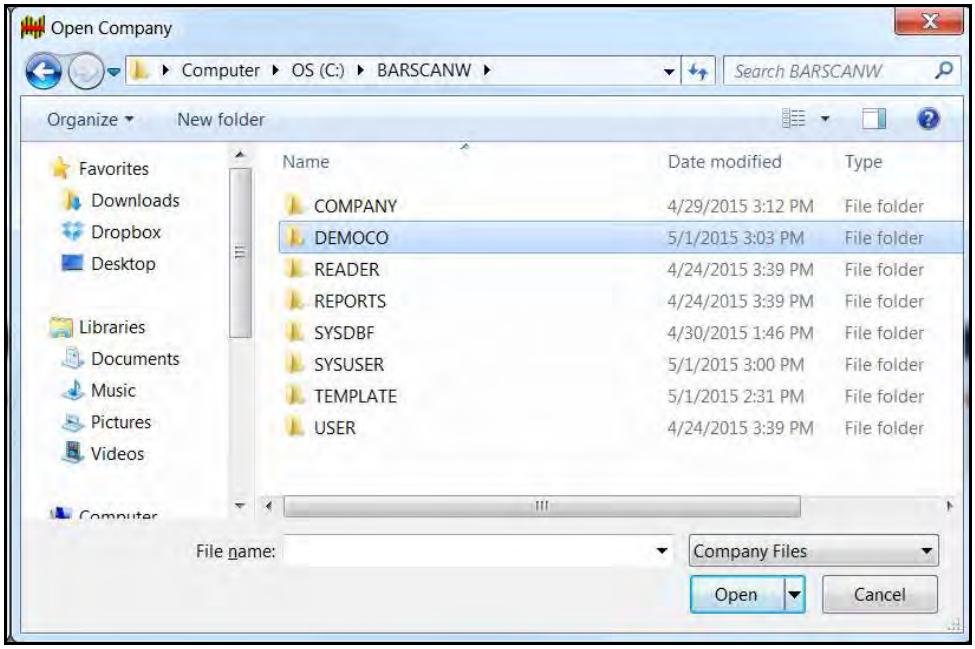
well as on the Help drop down menu, under About Bar|Scan for Windows.

INTRODUCTION TO DEMOCO COMPANY

If you have just installed Bar|Scan, the Main Menu will not list a Company name on the title bar. If your system has no company name listed, or a name of a company other then Democo, you will need to open the Democo company. The way to do this is demonstrated below. Simply select File . . . ▸, Company . . . ▸, Open.



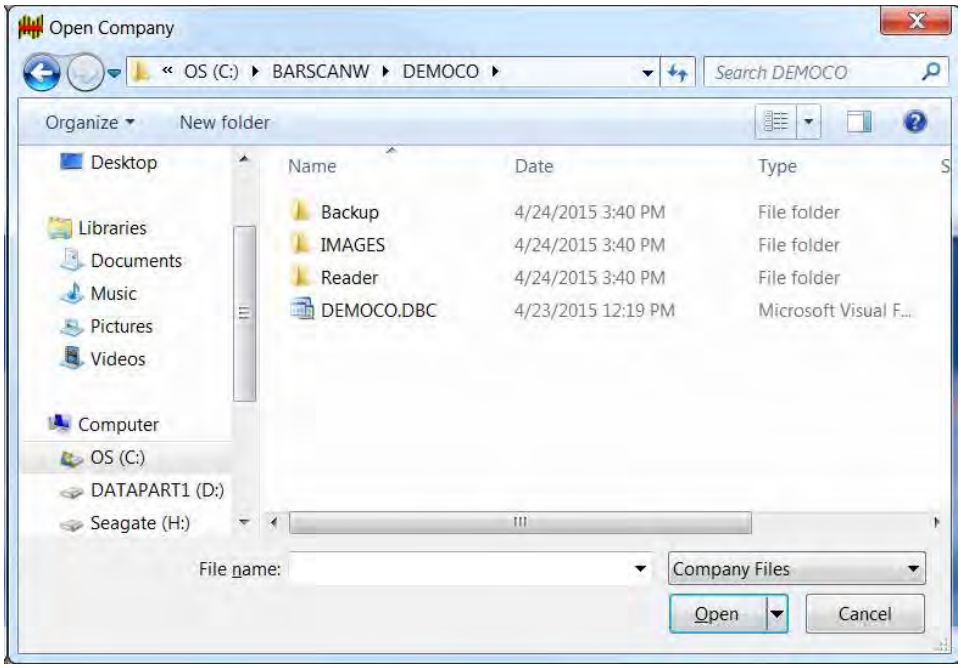
When you have selected to Open a Company, you will see a Look up Window similar to the one below.



Make sure the Look in Field displays the BarScanw folder, and your list should look similar to ours. Click on the folder called Democo so that it is highlighted, and then select the OK button.

Tip: If you have trouble locating the BarScanw folder, right click on the shortcut to BarScan on your desktop and select Properties. This should show the location where BarScan is installed on your computer or network.

You will be shown another Look up Window as displayed below.



You will see the democo.dbc folder in this window. Click on it to highlight it, and the field next to the word company will change to say Democo. Select the OK button. Your Democo company will now be open, and the blue title bar at the top of the Main Menu should display the word Democo.

Bar|Scan includes at least two databases, your own and a demonstration database.

By selecting File . . . ▸, Company . . . ▸, Close, then selecting the Company, you may close the current company. Then, by selecting File . . . ▸, Company . . . ▸, Open, you may select a different company from the Main Menu. You can switch back and forth between the two companies at any time, making sure that you have only one company open at a time. If you have the Multiple Company version of Bar|Scan, you can keep both companies open at the same time.

If you have already used the demonstration database, you may need to reinstall it. This tutorial relies on exact step by step instructions through the demonstration database. Changes you or a previous user made to the demonstration database may have altered the expected responses.

The Bar|Scan CD contains a demonstration copy of BarScan with a democo asset database that can be installed on your computer. Please consult Bar|Scan, Inc. or your Bar|Scan Dealer before attempting to reinstall the demonstration database.

We have provided a demonstration database to help you become more familiar with the system as well as provide a memory refresher if you have not used portions of the system for a while.

The demonstration database is only an example of how you may organize your assets. It is not designed to be the model of how you should implement your system.

You may decide to not track as much information as supplied in the demonstration, or you may decide to keep the information differently. For example, your Catalogs may not need to be as detailed as our examples are.

While you may not need all of the detail that we have put into the demonstration, it is good to know that you have the option of utilizing these features in the future.

TUTORIAL SUMMARY

The tutorial consists of step by step instructions to experiment with the different features. It is in order in which we recommend learning the features of Bar|Scan.

Our objective is to show you features that we want you to be familiar with. You may not use some of these features in your asset management program, but you should be aware of them.

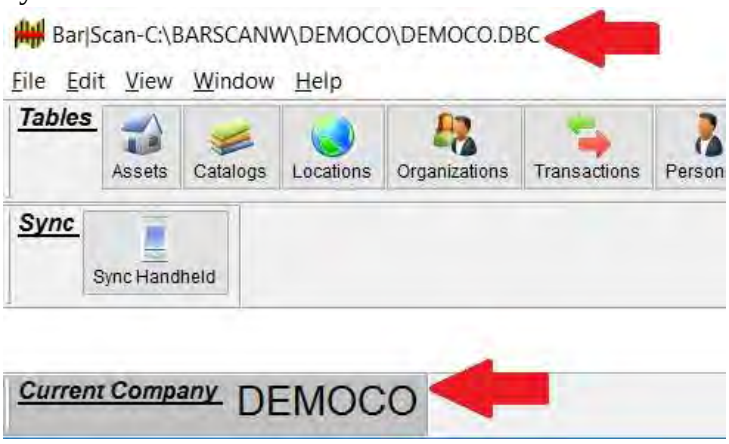
We will be reviewing the following topics in this tutorial.

- √ Beginning the Tutorial
- √ Organizations
- √ Locations
- √ Catalogs
- √ Transactions
- √ Assets

INSTALLING THE DEMONSTRATION DATABASE

Installing the demonstration database will NOT affect or erase real asset information unless you have entered real asset information into the demonstration tables by mistake.

To check if you are currently using the demonstration database for real assets, look for the word Democo on the title bar on the Main Menu of your Bar|Scan system as shown below.



If it says "DEMOCO" on the line, you may proceed with the demonstration. If not, refer to the previous section to learn how to open a new company.

If you have accidentally used the demonstration database for real assets, DO NOT PROCEED with this tutorial. Call for technical support so that we can help you correct this situation.

The demonstration database contains:

- √ An Organization Table with about 22 organizations
- √ A Location Table with about 56 locations
- √ A Personnel Table with about 48 personnel
- √ A Catalog Table with about 80 catalogs
- √ A Work Order Table with about 6 work orders
- √ A Transaction Table with about 50 transactions
- √ An Asset Table with about 550 assets
- √ A Catalog Table with about 80 catalogs
- √ A full set of System Reports
- √ Four Mobile Device Configurations
- √ Relevant entries in supporting tables such as the Condition Table

All of these Tables will be installed as part of the demonstration. You cannot select specific Tables because they share common information and will not work individually.

BEGINNING THE TUTORIAL

If you have accidentally used the demonstration database for real assets, **DO NOT PROCEED** with this tutorial. Call for technical support so that we can help you correct this situation.

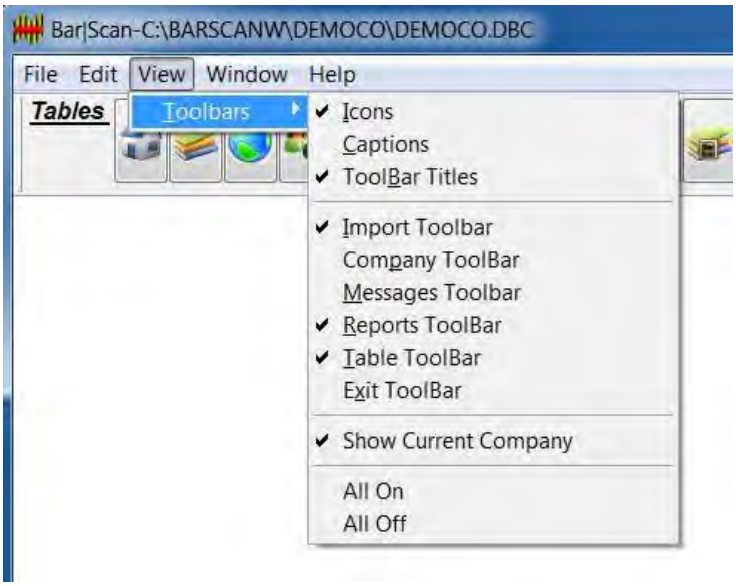
After you have installed the demonstration database and wish to begin the tutorial, click on the Bar|Scan Demo shortcut on your desktop.

We have arranged this tutorial to work with the tables in the order in which you will probably be creating your real database.

TOOLBARS

There are almost always two or more ways to do anything in any Windows program. Your Bar|Scan program includes two ways to open any of your programs, any of your reports, any company, two ways to import information from your Mobile Device, and two ways to exit the program.

To reach any of the items listed above, you need to go to the Main Menu in Bar|Scan. You can use the File drop down menu, or you can access one of the toolbars in Bar|Scan. Toolbars are simply shortcut icons that you can add to your Main Menu. To access the toolbars, go to the View drop down menu, and select toolbars as shown below.

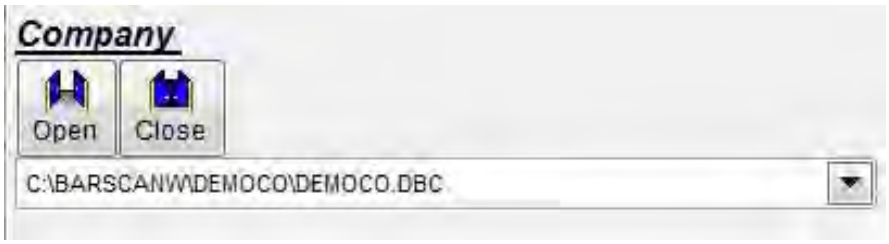


We have selected Icons without Captions.

The first toolbar listed is the Synchronize Toolbar. This toolbar is used to synchronize a Mobile Device. The toolbar looks like the one at right.

Although there is only one icon in this toolbar, it may be helpful to you, if you regularly synchronize Mobile Devices.

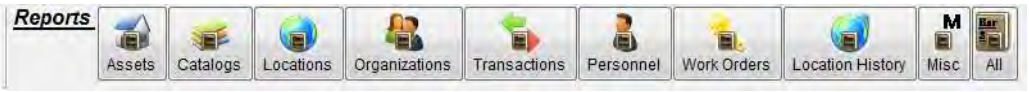
The second toolbar, the Company toolbar looks like the one below.



This toolbar includes two shortcut icons. The first icon opens a company. The second icon closes a company. Below the two icons there is a drop down field, where you can select the company that you wish to open or close.

Obviously, because this toolbar deals only with opening and closing companies, you would only benefit from this toolbar if you have a Multiple Company version of Bar|Scan and your work involves switching between the various companies.

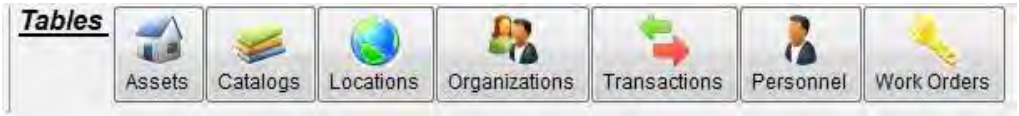
The third toolbar, the Reports toolbar is shown below.



This toolbar allows you to open any of the respective types of reports, with just a click on the proper icon. The icons from left to right open reports for: assets, transactions, catalogs, locations, miscellaneous, all types, location history, organizations, and work orders.

You do not need to memorize the order, as using them will soon allow you to know them by heart, and placing your cursor over them will show you a balloon pop-up that will say what they will open.

The fourth toolbar, the Table toolbar is shown below.



This toolbar will allow you to open any of the major tables by simply clicking on the respective icon. The icons from left to right represent tables for: assets, catalogs, locations, organizations, transactions, personnel and work orders.

You do not need to memorize the order, as using them will soon allow you to know them by heart, and placing your cursor over them will show you a balloon pop-up that will say what they will open.

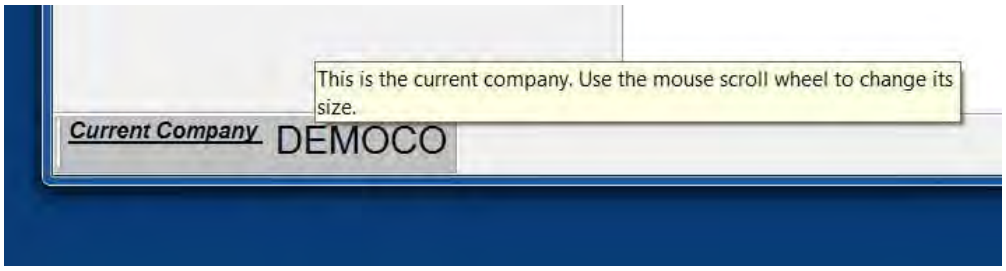
The last toolbar listed, the Exit toolbar is shown below.

Clicking on this icon will close the Bar|Scan program.

The last two items on the View drop down menu will turn all of the toolbars on, or turn all of them off with just a click beside the proper option.

The use of icons is optional, but can save you a great deal of time. You can also arrange your icons on your Main Menu by dragging the outside edges of the icons to the area of your choice. Your Main Menu might look slightly different from ours because of this.

The ‘Show Current Company’ item is shown below.



It is located at the bottom of the Bar|Scan Main Menu and displays the Company Name of the selected database. Using your mouse scroll wheel will adjust the size.

The last two items on the View drop down menu will turn all of the toolbars on, or turn all of them off with just a click beside the proper option.

OVERVIEW OF THE SYSTEM

The Bar|Scan system was designed to include as much information as possible about each of your fixed assets.

In order to make the system easier to use and maintain, the information is broken up into separate tables. Let us now explore briefly what type of information each table was designed to contain, in the order of what is to be entered first, and why.

Organization Table

The Organization table is an optional feature, and was designed to hold departmental information or cost centers. Therefore, if your company tracks assets according to which department is responsible for them, you may want to collect this information.

The Organizations (or departments) may be "linked" to a location, or to individual assets.

If it is not necessary for your company to track this type of information, you may decide to not use this feature, but we will demonstrate how to add Organizations to your table in our demonstration for those who wish to use this feature.

Location Table

Most of the items in the Location table are optional, but we suggest that you take full advantage of all of the options in this table, as it can make tracking your assets much easier in the future.

The Location table will hold three different types of locations: Site locations, Pallet locations, and Vault locations. Each of these different types of locations can be used by any given company, but the most widely used are Site locations, designed for office type buildings. For more information on the Pallet and Vault locations, please see the Locations chapter of this User Manual.

Let us review the type of information that the Site locations were intended to hold. There are fields for: Region, Building, Floor, Room, Room Tag, Location Description, Referenced Organization, and Square Footage. The first four fields listed here, have a hierarchy from largest to smallest, and while consisting of five fields, are considered "one" location.

The Region field was designed to make it easier to track assets for Large areas. Therefore, if you have assets in several different cities or states, you could easily separate the assets by designating a two-digit abbreviation for the separate areas, i.e., CA for the state of California. You can also stretch the length of the Region field as well as the other text fields to accommodate a longer text.

The Building field was designed to make it easier to track more than one building full of assets. This way, you could make an abbreviation for the building, or use the building's address number for its designation. Unless you stretch the length of the field, the building field can hold up to five characters.

The Floor field was designed to make it easier to track your assets by designating which floor they exist on. If your building has more than one floor, we suggest that splitting the locations into separate floors is not only logical, but can make finding each asset easier in the future. Unless you stretch the length of the field, the floor field can hold up to five characters.

The Room field was designed to make it easier to track your assets by designating which room the assets exist in. The Room field is usually filled with a room number. As mentioned before, unless you stretch the length of the field, the Room field may contain up to six characters.

The Room Tag field is an optional field, but was designed to assist those doing the inventory by making a single unique bar code for each location that would eventually represent the Region, Building, Floor, and Room. This field can hold up to eight characters.

The Location Description field is an optional field, but was designed to hold additional information about the location, which may include things like the entire address of the building, or something as simple as a description of the room, i.e., Conference Room or Cubicle.

The Referenced Organization field is designed so that once the Organization table is filled out with the departmental information from your company, you can designate an entire room or location with its corresponding department. This field should ONLY be used in this scenario if the ENTIRE location is filled with assets from ONLY this department. Therefore, if a room is filled with only items that belong to the Accounting department, you can safely add the Accountings Organization to this field. If, however, the assets in the room belong to two or more departments, or if that information frequently changes, you should leave this field blank, and associate the department information to the actual Assets during the inventory process.

The last field is Square Footage, and is optional. This field was designed for companies that track the number of square feet in any given location, mainly for billing purposes.

Personnel Table

The Personnel table is an optional feature, and was designed to hold information about persons to whom your assets are assigned to. Therefore, if your company tracks assets according to which person is responsible for them, you may want to collect this information.

The Names (or users) are “linked” to individual assets.

If it is not necessary for your company to track this type of information, you may decide to not use this feature, but we will demonstrate how to add Names to your table in our demonstration for those who wish to use this feature.

Catalog Table

The Catalog table was designed to hold all the descriptive information about your fixed assets. Think of the Catalog table as you would a retail catalog book from your favorite store. When you look in the catalog book from your favorite store, you might notice that it is divided into Categories. Within each category, there are various types of items. Within each type of item, there are descriptions of each of these items, and perhaps even a picture, i.e., if you are looking for a new drill, you would go to the tool section, go to the drills, and then look through the descriptions to find the specific drill that you want.

The Catalog table within Bar|Scan is designed to work in exactly the same way. We have divided each Category by Catalog Types, and each type by Catalog Descriptions. Then, there are spaces for the Manufacturer, Manufacturer's part number, extra Manufacturer's information, and then, in addition to these fields, there are up to seven fields available for each Category for additional information. If you had a Catalog of a drill from Bar|Scan, with this many fields of information filled in, you should be able to go into any room filled with drills, and pick out the specific type and model of drill described in the catalog.

As with any catalog, the information in the catalog only points to the type of item (like the type of drill). The store may have fifty of these drills, and you may order as many of these them as you want. The catalog gives you only information about the type of item. If you want to know the serial number of the drill, you wouldn't expect the store to list that information in their catalog. Bar|Scan does not put that type of information in the Catalog table, either. Any information definitive to a specific Asset, will be linked to the actual Asset in the Asset table.

There is an optional Imaging module for Bar|Scan. This module would allow you to add a digital picture to each Catalog.

Transaction Table

The Transaction table was designed to hold the information that is collected with the Mobile Device. When the Mobile Device is synchronized, the information is placed into the Transaction table. Once the information is in the Transaction table, you can check all of the information to ensure that it is correct before moving that information into the Asset table.

Asset Table

The Asset table is where all of the information from every table of Bar|Scan comes together. Each Asset can contain: an Organization, a Location, a Catalog, and any other information that is specific to that particular information, such as a Serial Number, an old inventory number, even the date and time that the asset was inventoried. Depending on the modules that you purchased with your Bar|Scan system, you may even store Accounting and Work Order information about each asset in the Asset table.

Using the System

Now that you have an idea of the types of information that each table was designed to hold, you can begin the tutorial in order to learn in a practical manor how this information comes together. Even if you do not plan on using a specific feature, we suggest that you go through the entire tutorial so that you will feel more comfortable with your system when you start using your own company.

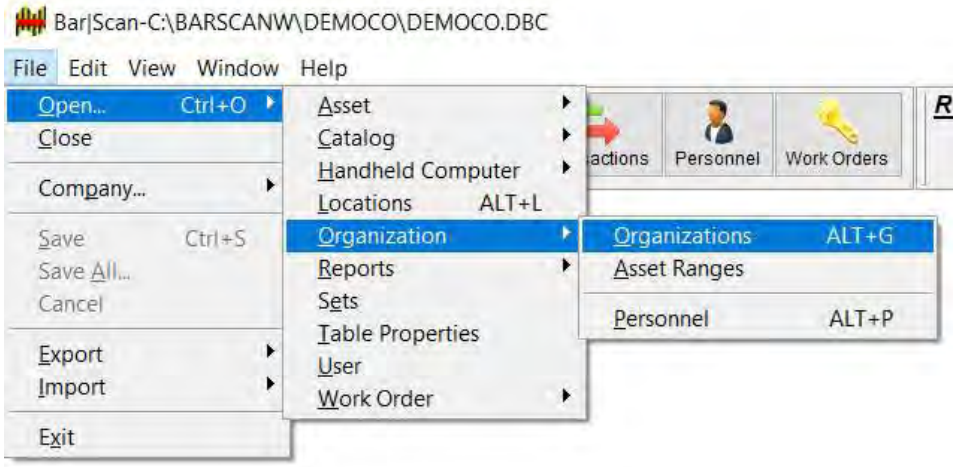
During this tutorial, you will see that all of the different tables work in the same manor. Each of the tables have a toolbar of their own (located at the bottom of the table) making it easier for you to use the table efficiently.

You will learn how to Change Organization information, Add a Template Location, and Add a Blank Catalog, move around and check problems in the Transaction table, and move columns, and sort the database by different information in the Asset table.

ORGANIZATIONS

Let's proceed with our step by step tutorial now.

Select Organizations from the Main Menu. If you are not at the Main Menu, you can probably get there by closing a panel, or by backing out of a feature by pressing the ESC key. Select File . . . ▸, Open . . . ▸, Organizations as shown below.

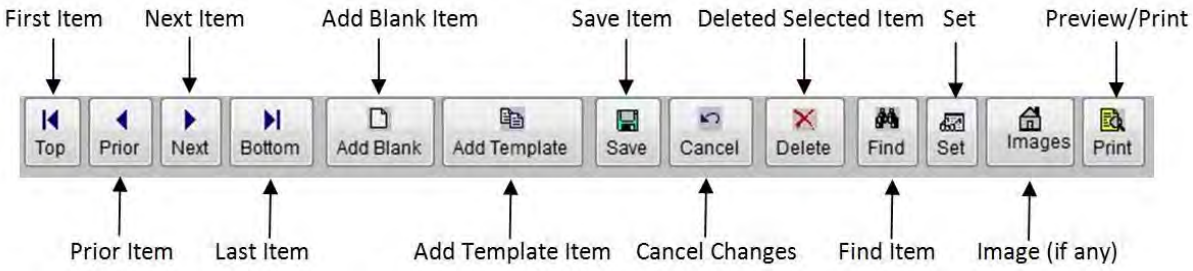


Optionally, if you have added the table toolbar to your Main Menu, you can simply click on the Organization icon as shown below.

You will see the Organization table. The Browse panel should be selected when it first opens.

Notice that there is a Tool Bar located at the bottom of the Panel as pictured below. Each button is explained in more detail in *Chapter 4- System Overview*.

The tool bar is displayed at the bottom of each of the tables. Each button on the tool bars has a balloon description that will appear when you hold your mouse on top of it.



We can perform several actions including Find, Add, Delete, and Set.

We now want to experiment with moving around inside of the Browse panel. To do this we will use many of the cursor movement keys on your PC keyboard.

Press the **Page Down** key to scroll down in the window.

Press the **Page Up** key to scroll up in the window.

Press the **Control** key and the **End** key to go to the very end of the file.

Press the **Control** key and the **Home** key to go to the very beginning of the file.

Press the **Up** and **Down** arrow keys.

Now use the **First Item, Next Item, Last** Item, and **Prior Item** buttons from the Tool Bar.

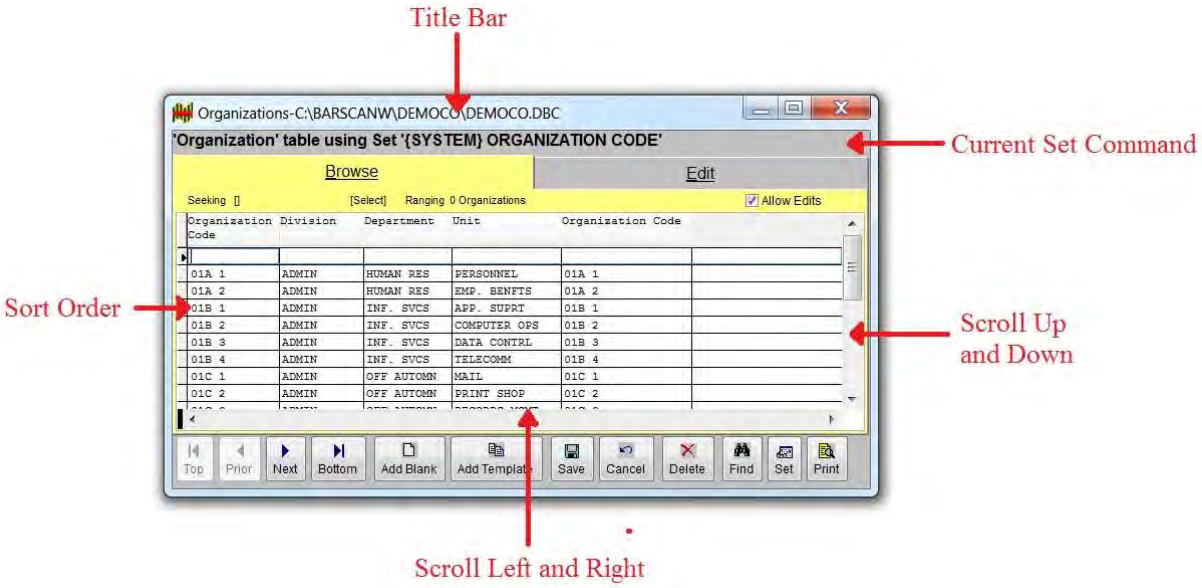
As you can see, we can move through the entire database by simply using the cursor movement keys. As with your choices so far, you may also use your mouse to click on your choice, or to click on the scroll bar at the right of the Browse window.

You will want to refer to *Chapter 5 - Operating the System* for more information on how to use the mouse with the windows.

Most of your work will start with the display of a Table, showing the Browse panel. The information contained in a Table's Browse panel can be changed easily by using the Panel feature on your main menu.

Without going to the Main Menu, you can change the order that the information is presented in by changing the Order By (it will sort differently) and you can change the order of the columns as well. In addition, Browse panels can be scrolled. You can use the tab key to view columns past the right side of your panel. You can also resize the panels, by placing your cursor on the edges, and when it turns to a two-headed arrow, left click and drag the screen.

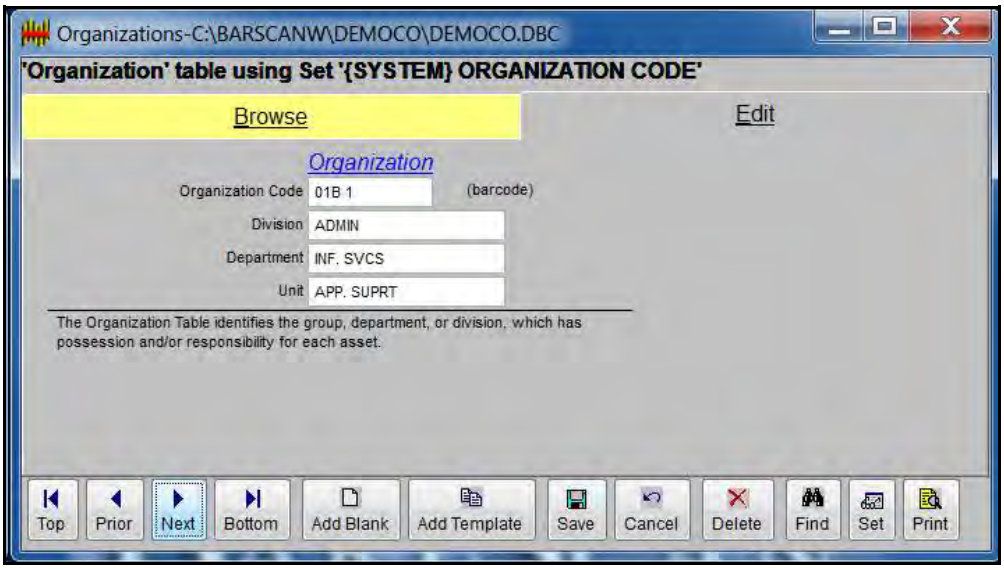
A sample window is displayed below.



Organization Code	Division	Department	Unit	Organization Code
01A 1	ADMIN	HUMAN RES	PERSONNEL	01A 1
01A 2	ADMIN	HUMAN RES	EMP. BENFTS	01A 2
01B 1	ADMIN	INF. SVCS	APP. SUPRT	01B 1
01B 2	ADMIN	INF. SVCS	COMPUTER OPS	01B 2
01B 3	ADMIN	INF. SVCS	DATA CONTRL	01B 3
01B 4	ADMIN	INF. SVCS	TELECOMM	01B 4
01C 1	ADMIN	OFF AUTOMN	MAIL	01C 1
01C 2	ADMIN	OFF AUTOMN	PRINT SHOP	01C 2

Use your mouse to experiment with the above browse features.

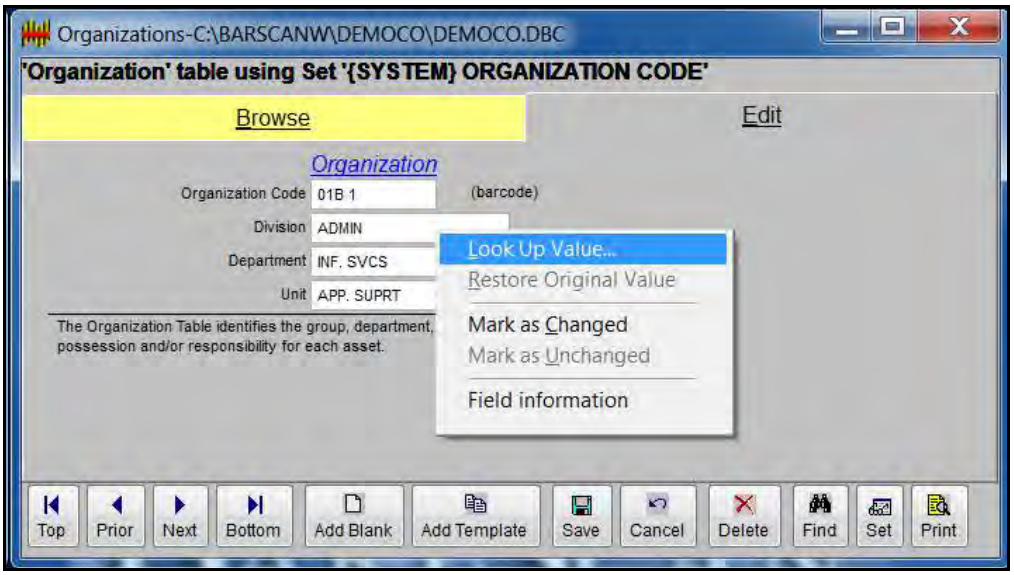
Select the Organization Code 01B 1 from the Browse window, and then select the Edit tab, you will see an Edit panel similar to the one below.



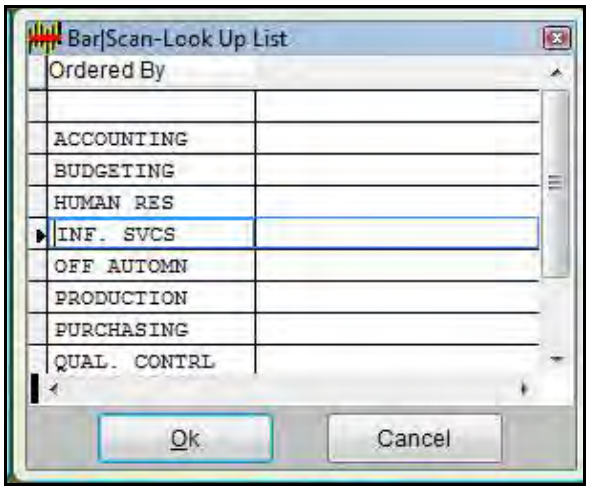
At this point, you are Editing (or Changing) the information shown on this Organization.

Use the down arrow key on your keyboard or Enter key, move your cursor down to "dept.".

When your cursor is in the department field, use your mouse to right click, and select the Look up Value as shown below.



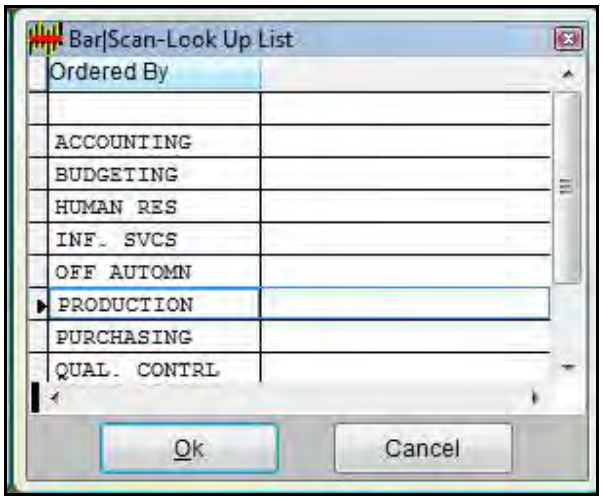
A Look up Window will appear, presenting you with a list of available Departments to choose from.



You should already know how to move around inside of this window. If not, review Chapters 4 and 5 of this User Manual.

By using the Page Down and/or down arrow keys, scroll down the list of Departments until you are on Production.

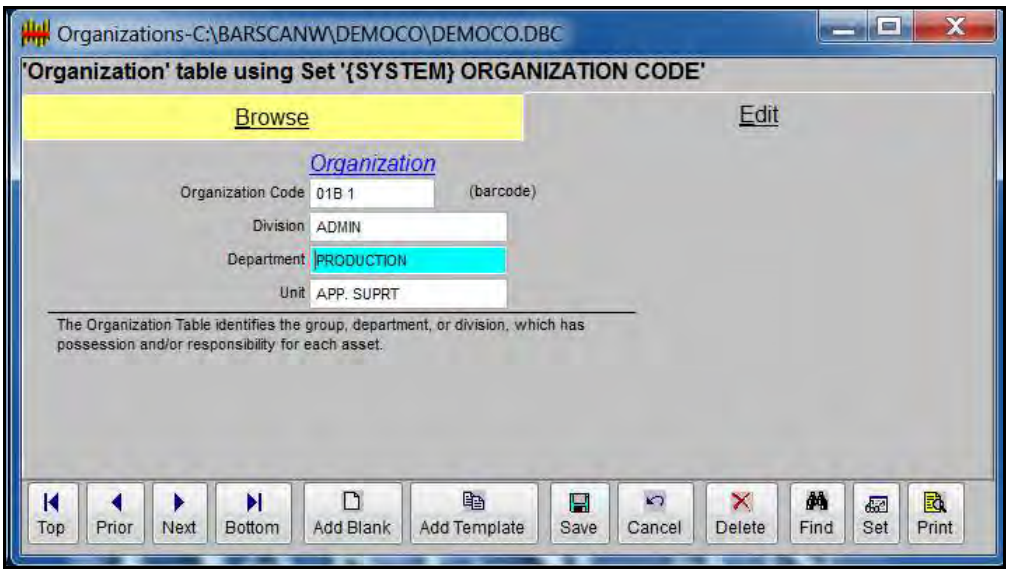
Place your cursor on this item, to "highlight" it, as shown below.



Let us change the Organization by selecting to use the **Production** Department from the Look up Window.

Place your cursor on the word Production, and then select to use it by clicking on it twice, pressing the <Enter> key on your keyboard, or clicking on the OK button.

Your Organization should now look similar to the one below.



It is important to note that you have just created a new structure titled "Admin/Production/App. Suprt" by changing the Organization's Department to Production.

If you were going to save the change to the Organization, you would press the Save button (the icon that looks like a floppy disk) from the tool bar, or press the Ctrl + S key combination to save the change to the new Organization. Click on the Save icon.

A final prompt will appear to verify your request.

You may respond **Y** for yes or **N** for no. We recommend that you respond **N** so that you can redo this portion of the tutorial without having to reinstall the demonstration database.

You are now finished with this portion of the tutorial.

Select the Cancel Changes (to Select Organizations) icon from the toolbar. It looks like the icon below.

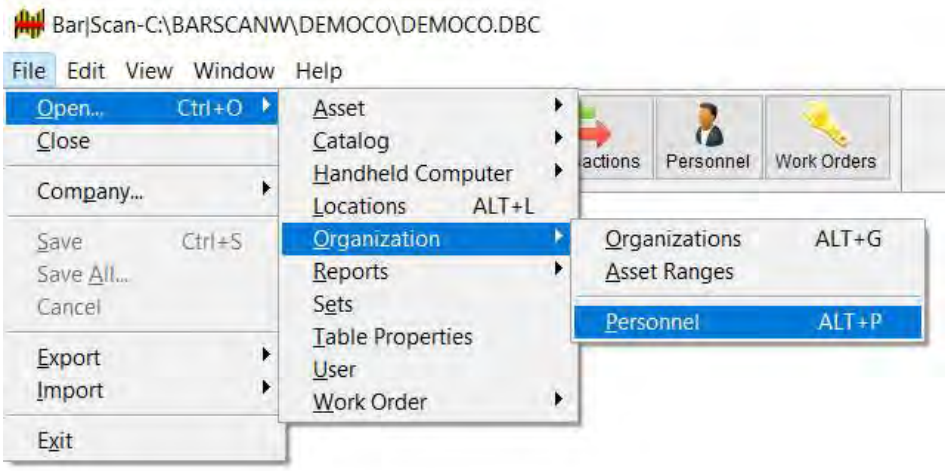
You will be asked to confirm your choice to cancel the changes.

Press the X at the top of the Organization table to close it. You should again be at the Main Menu.

PERSONNEL

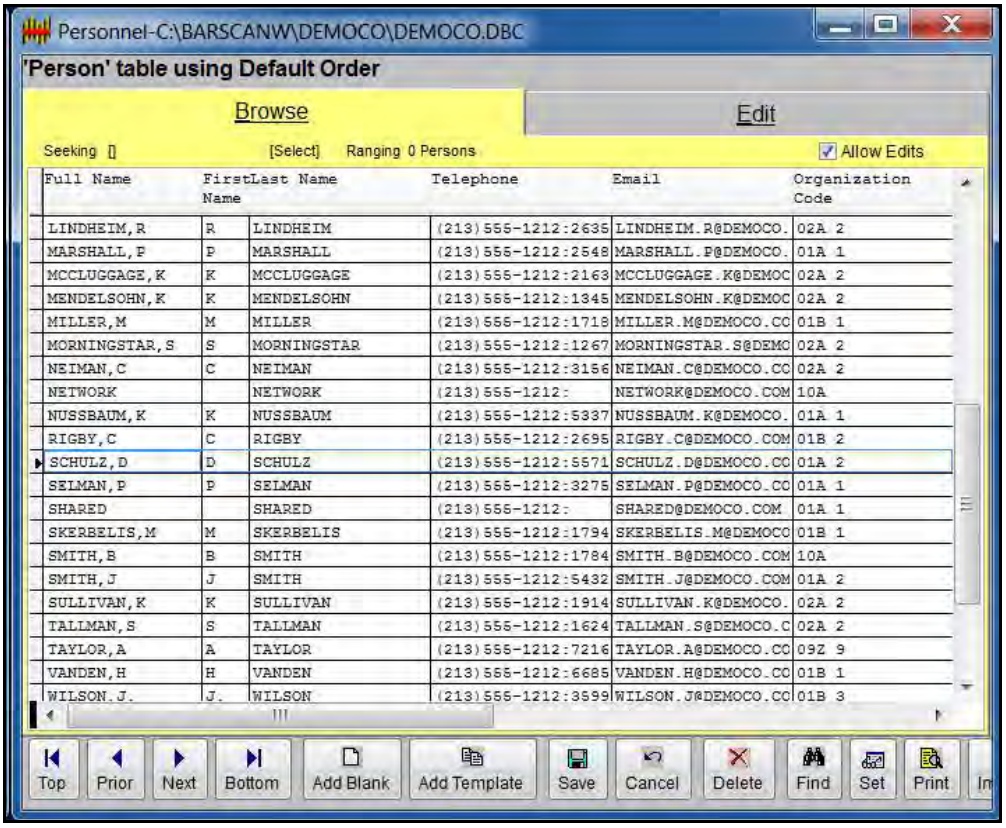
You have changed an Organization, now Add a Name.

Open the Location table from the Main Menu, select File ... ▸, Open ... ▸, Personnel as shown below.



Or, if you have the Table toolbar on your Main Menu, you can simply click on the Location table icon, shown below, to open the Location table.

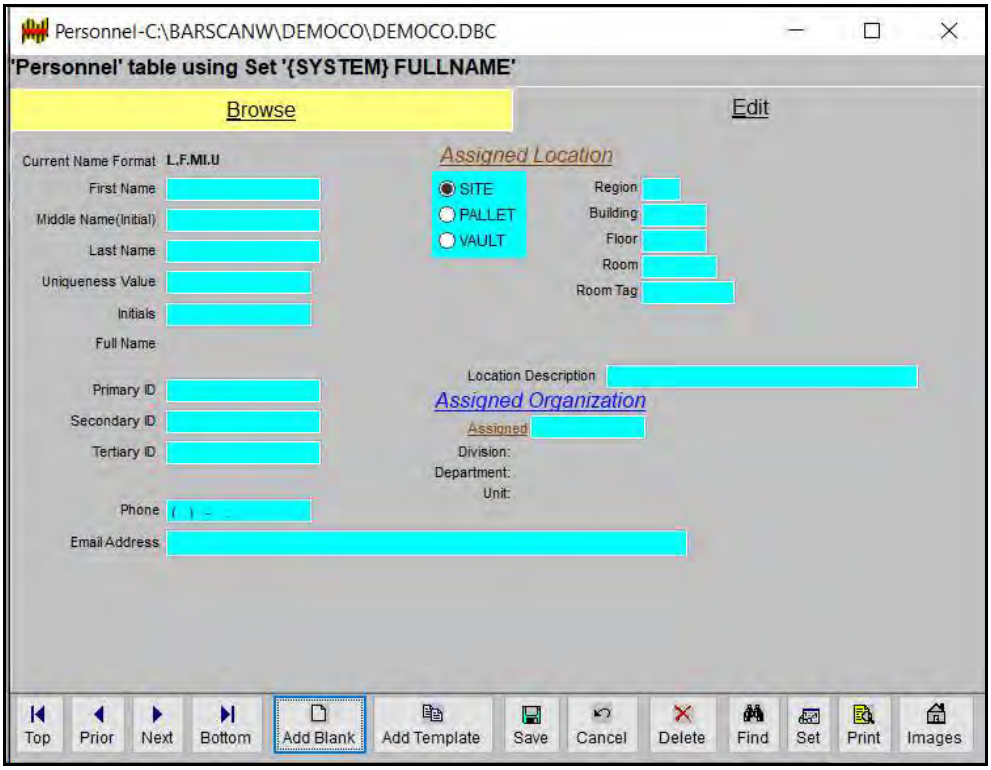
When you open the Personnel table, the Browse panel will be selected by default as shown below.



Click on the Edit tab. Then, in order to add a new name, select the Add Blank button from the toolbar as shown below.

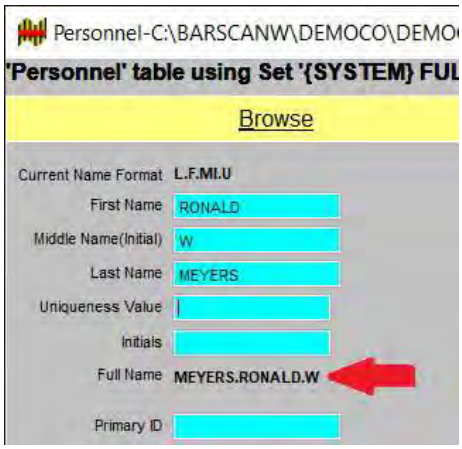
You will be shown a dialog box that will ask you to confirm your choice to add a blank Personnel. Select Yes.

You will be shown a window similar to the following.

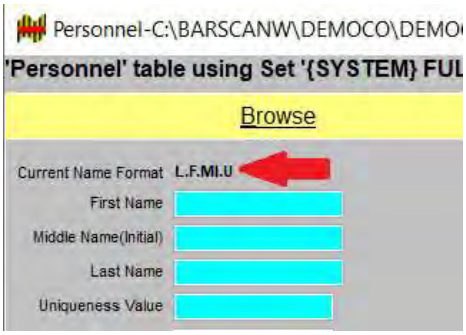


There are several fields that together create the Full Name. You can enter a First Name, Middle Name or initial and Last Name.

You can also add a Uniqueness Value. This may be necessary when you have two or more personnel with the same Names, e.g. Ronald W Meyers. Notice below that the Full Name get completed for you as you type.



The Full Names are completed according to a specified format. The format is displayed on the screen below.



The format L,F,MI,U means that the Full Name will be (L)ast, (F)irst, (MI)ddle Initial and (U)niqueness Value. The Current Name Format can be changed in the Company Settings Screen.

Select the Save button from the toolbar or the Ctrl + S key combination to Save the changes to the Location. You will be shown a dialog box similar to the one below.

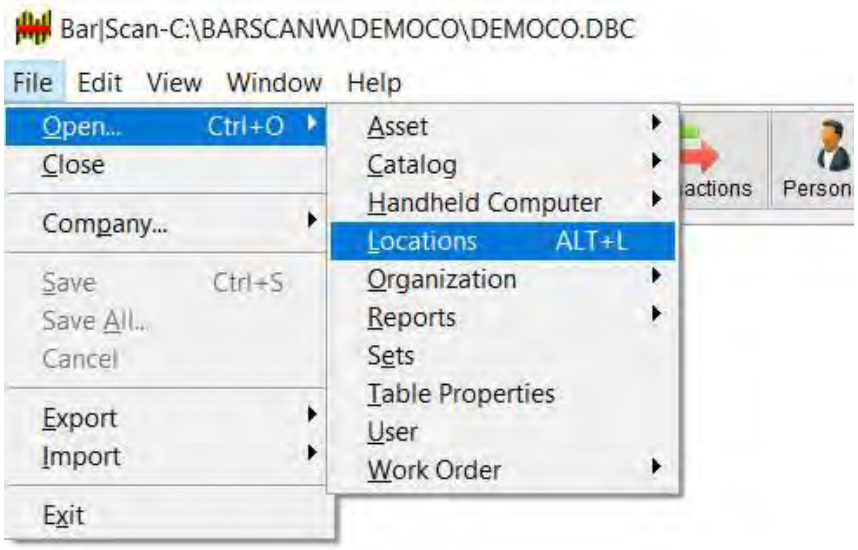
You may respond **Y** for yes or **N** for no. We recommend that you respond **N** so that you can redo this portion of the tutorial without having to reinstall the demonstration database. Select the Cancel Changes to Select Locations icon from the toolbar. It looks like the icon below.

You will be asked to confirm your choice to cancel the changes. Press the X at the top of the Location table to close it. You should again be at the Main Menu.

LOCATIONS

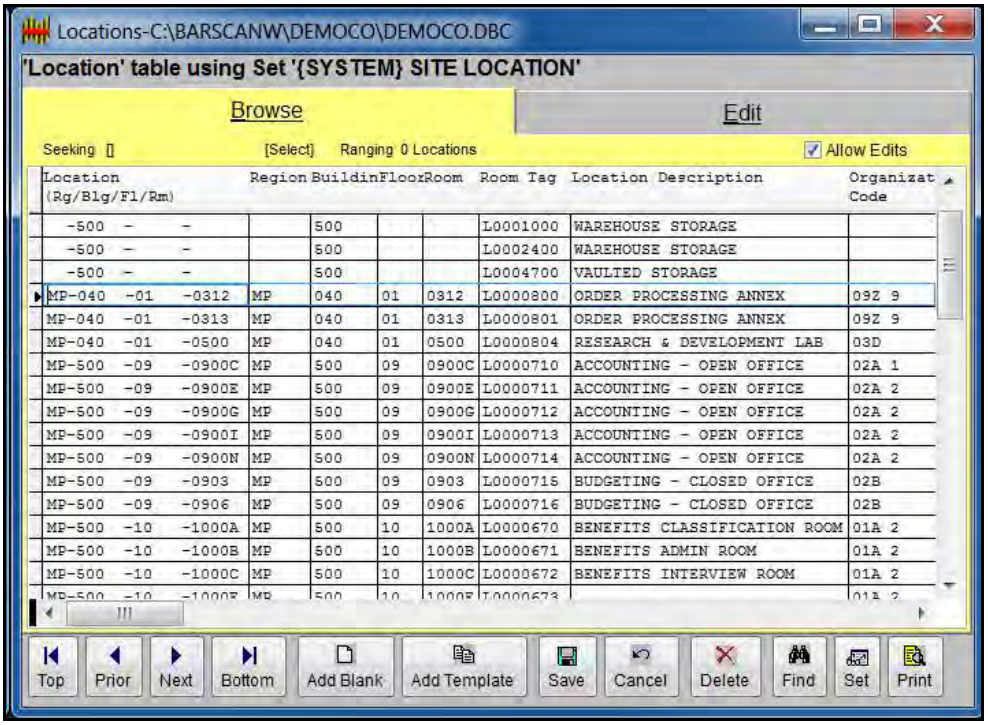
You have added a Name, now Add a Location.

Open the Location table from the Main Menu, select File ... ▸, Open ... ▸, Locations as shown below.

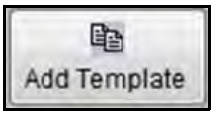


Or, if you have the Table toolbar on your Main Menu, you can simply click on the Location table icon, shown below, to open the Location table.

When you open the Locations table, the Browse panel will be selected by default as shown below.

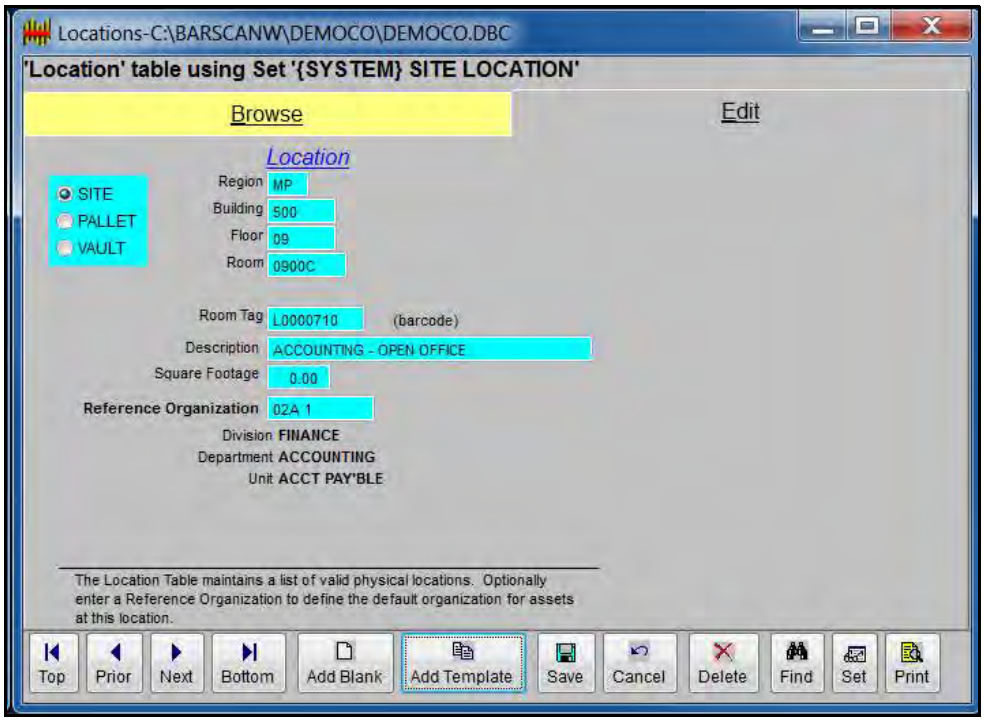


Place your cursor on the MP-500-09-0900C Location. Then, in order to add a new Location, select the Add Template button from the toolbar as shown below.



You will be shown a dialog box that will ask you to confirm your choice to add a Template Location. Select Yes.

Then, select the large Edit tab, and you will be shown a window similar to the following.



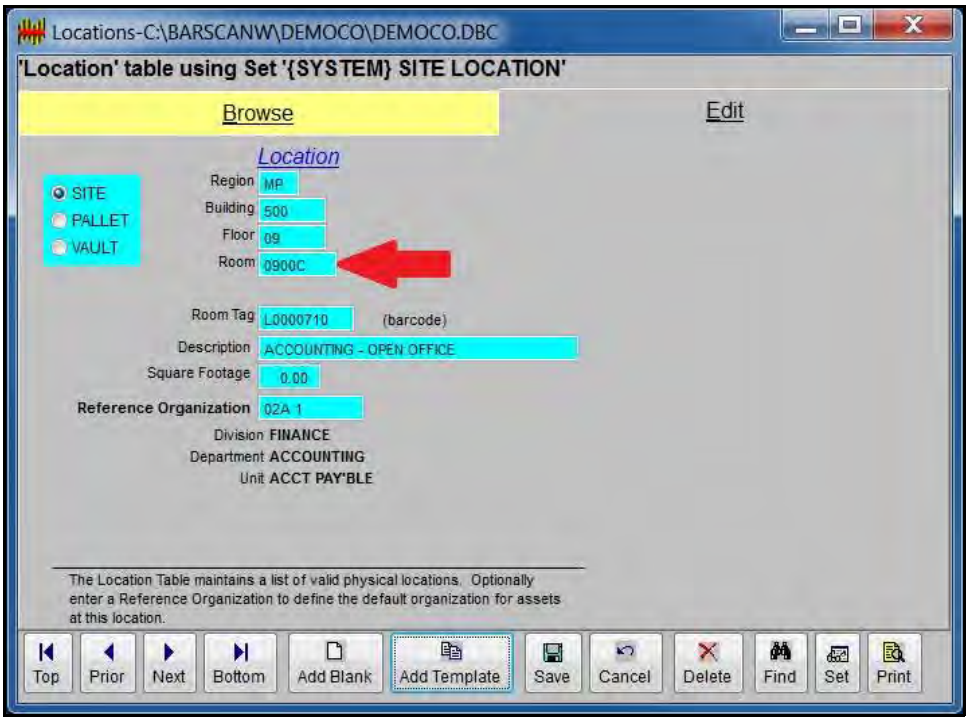
There is an exact duplicate of the Location that you chose as a template listed on this panel.

If you were adding your first Location in your own company, you would not have one to use as a template. During this instance, you would need to select the Add Blank Location button from the toolbar, it looks like the one below. But, for this tutorial, there are already Locations listed in the Location table, and you may simply Add a Template Location, and make changes to it.

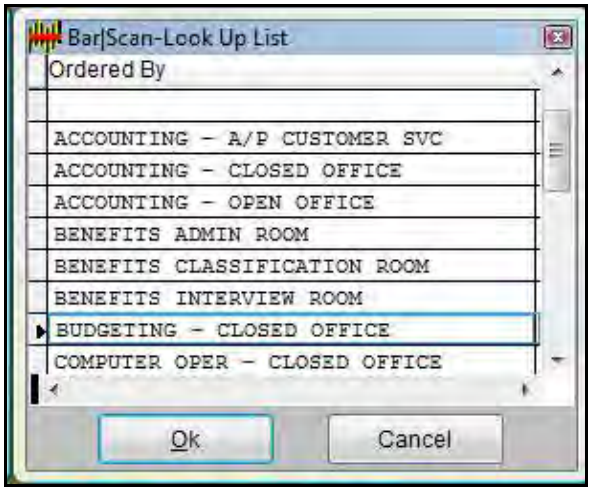
Until the Locations have been added, more than likely the information that you use to add them will be displayed for you on maps of your buildings. When you made changes to the Organization, you right clicked while inside the field and selected Look up Value when it appeared. You can use this same technique for all fields, but the information that you need to add may not be in the Look up Window.

If you were adding Locations for your own building(s), you would want to add from a template after adding your very first location from a blank location. By using a template to add from, you would only need to change the fields that affect the Location you are trying to add. In our example, you selected the MP-500-09-0900C Location for your template. If the next Location that you were adding was the same Region, Building, and Floor the only Location fields that you might have to change are the Room, (Referenced) Organization, and the Square Footage.

Place your cursor in the Room field, and change the 0900C to 0900D by simply typing over the old Room, as shown below.

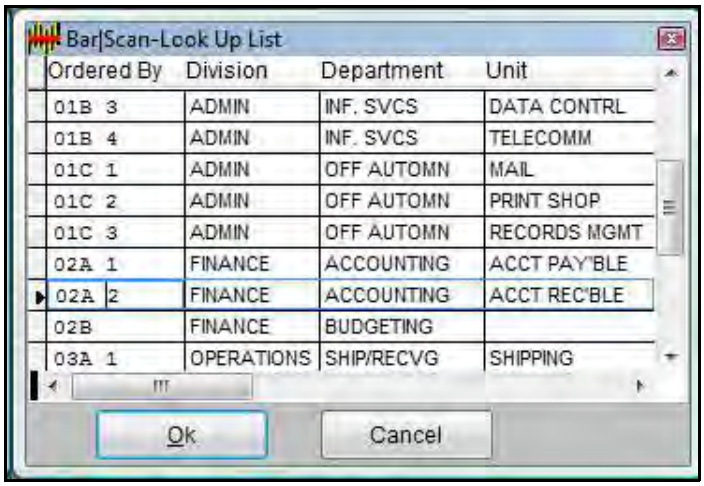


The Location Description can be changed by placing your cursor into the Location Description field, and right click. Select Look up Value, and you will be shown all of the Location Descriptions that were entered into the Location table as shown below.



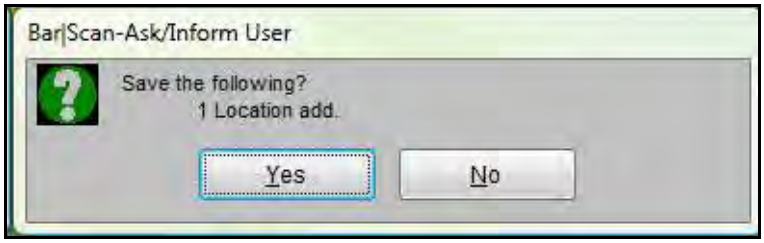
Select Budgeting - Closed Office from the Look up Window, and you will be ready to fill out the Organization information.

The Organization can be changed by placing your cursor into the Organization field, and right click. Select Look up Value, and you will be shown all of the Organizations that were entered into the Organization table. The Organization Look up Window is shown below.



Select the O2A 2 Organization, and it will be entered into your Location Edit panel for you.

Select the Save button from the toolbar or the Ctrl + S key combination to Save the changes to the Location. You will be shown a dialog box similar to the one below.



You may respond **Y** for yes or **N** for no. We recommend that you respond **N** so that you can redo this portion of the tutorial without having to reinstall the demonstration database.

Select the Cancel Changes to Select Locations icon from the toolbar. It looks like the icon below.

You will be asked to confirm your choice to cancel the changes.

Press the X at the top of the Location table to close it. You should again be at the Main Menu.

CATALOGS

Catalogs serve two primary purposes. First, they allow assets to be easily grouped and fully described in a very consistent manner.

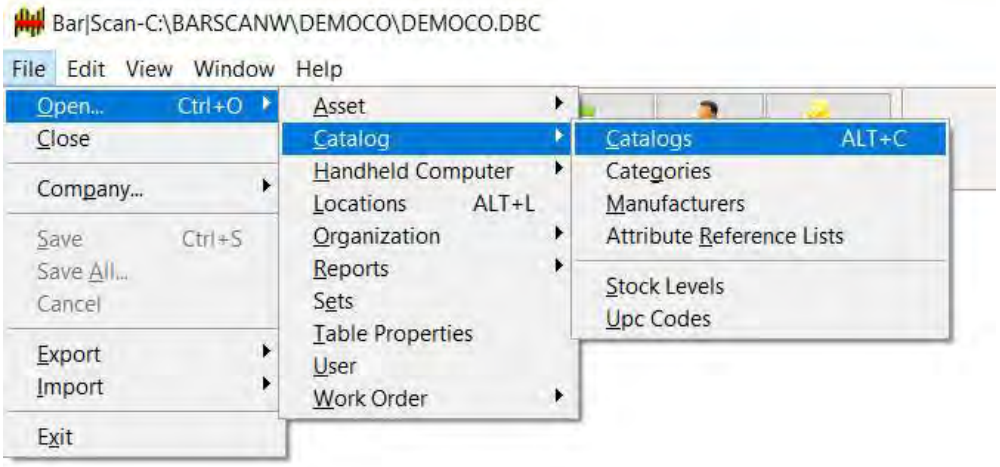
Second, Catalogs make it easier to perform the physical tagging of assets on large projects. By downloading Catalog into the Mobile Device for your tagging teams, we can familiarize them with the different kinds of assets.

Optionally, by the use of a digital image attached or an image printed on the Catalog Sheet, we can give our tagging teams a visual representation of the asset.

For more information on the Cataloging process as well as the use of the Data Collection Sheet to help collect Catalog information, see *Chapter 2 - Suggested Procedures.*

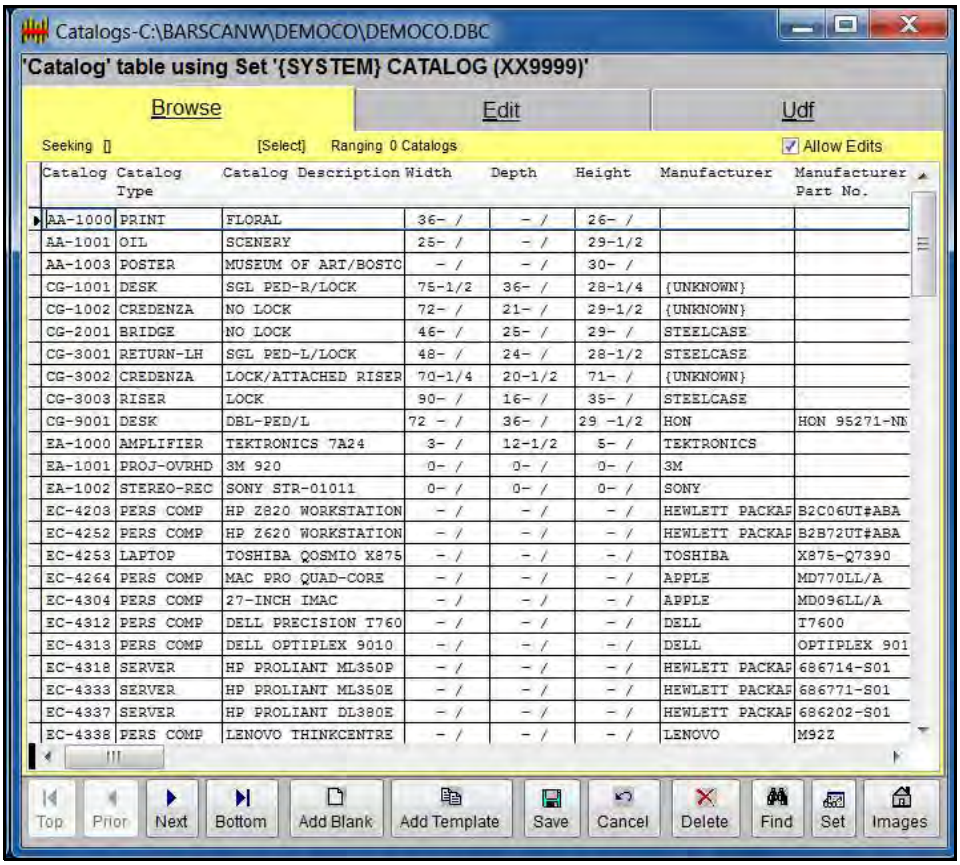
Let's proceed with our tutorial now.

Select *Catalogs* from the *Main Menu.* If you are not at the *Main Menu*, you can probably get there by closing other windows. To select Catalogs begin from the Main Menu, select File . . . ▸, then Open . . . ▸, then Catalog . . . ▸, then Catalogs as shown on the following example.



Or, if you have selected to add the Tables toolbar to your Main Menu, you can click on the Catalog icon as shown below.

You are presented with the following panel.



The Browse tab will be displayed at this point. The first column in the browse window is the Catalog, other columns may vary since they can be customized by you.

There is another way to move around inside of the Browse panel. The “Seeking” feature in Bar|Scan will track the characters you type. Press the **E** character key on your keyboard.

Bar|Scan will find the first Catalog Item that begins with "E.” The first match is "EA1000 Amplifierp.” As you have just experienced, we cannot only move in the window, but we can also find information by pressing character and number keys.

Now press the **P** key. You can see that Bar|Scan will look for the closest "fit" to the characters you type. The match is "EP2000 Scanner, HP ScanJet 4890.”

If your match is *not* "EP2000,” you probably pressed an incorrect key. You can easily start the seeking process over by pressing the left arrow key several times. This moves the cursor back to the leftmost character in the window.

Notice just under with word “Browse,” the word “Seeking” with open and close brackets to the right. This item displays the characters you have typed to find the Catalog. For example, at this point it will say “Seeking [EP]” because you typed “EP.”

You may try new letters on your own. If the highlight doesn’t, do not be alarmed. Bar|Scan is simply trying to tell you that it cannot find any selections that match your choice.

Notice that the list of catalogs is in alphabetical order. The first part of any catalog consists of two letters, followed by four numbers, followed by a type, then a description, etc.

When you feel comfortable with the way seeking works you might notice that Bar|Scan will only let you choose two letters at a time, and then will stop every time you press a letter, until you use the left arrow key to move the highlight away from your letters. This is because all catalogs begin with only two letters. Now type the a four digit number, i.e., 2504. You have now moved from the first catalog of your category. Because catalogs need two letters, and four numbers, catalog numbers need to be 0001 or more, our database starts at numbers of 1000. Hint: The ‘-’ dash is only a spacer and need not be typed.

Like before, you may still scroll up and down the list, and you may still use the left arrow key to move the highlight to the left away from your choice.

You can continue typing characters. Bar|Scan will try to find a match for every character. When no match is found, Bar|Scan stops on the closest match, or it will stop to show that no catalog was found that is even close to your choice.

Press the left and right arrow keys several times.

As you can see, arrow keys move your cursor left and right and can also help you find the Catalog match that you are looking for.

Bar|Scan has a means to pick a group of items from the Look up Window. This is called the Range feature. We are not going to use it at this time but it is fully described in *Chapter 5 - Operating the System.*

Adding a New Catalog Item

We are now ready to add a new Catalog. Pick the Add Blank button by clicking on it with your mouse. The Add Blank button is located on the Tool Bar and looks like this.

You are now presented with the following message to confirm your selection.

Select Yes by clicking on it. Note: confirmation messages can be turned off in your Personal Program Preferences after you become more familiar with the program.

Make sure you have the laminated training sample form titled "NEW CATALOG DATA COLLECTION SHEET" available now. If you do not have one, you can print one from the Bar|Scan Report Generator.

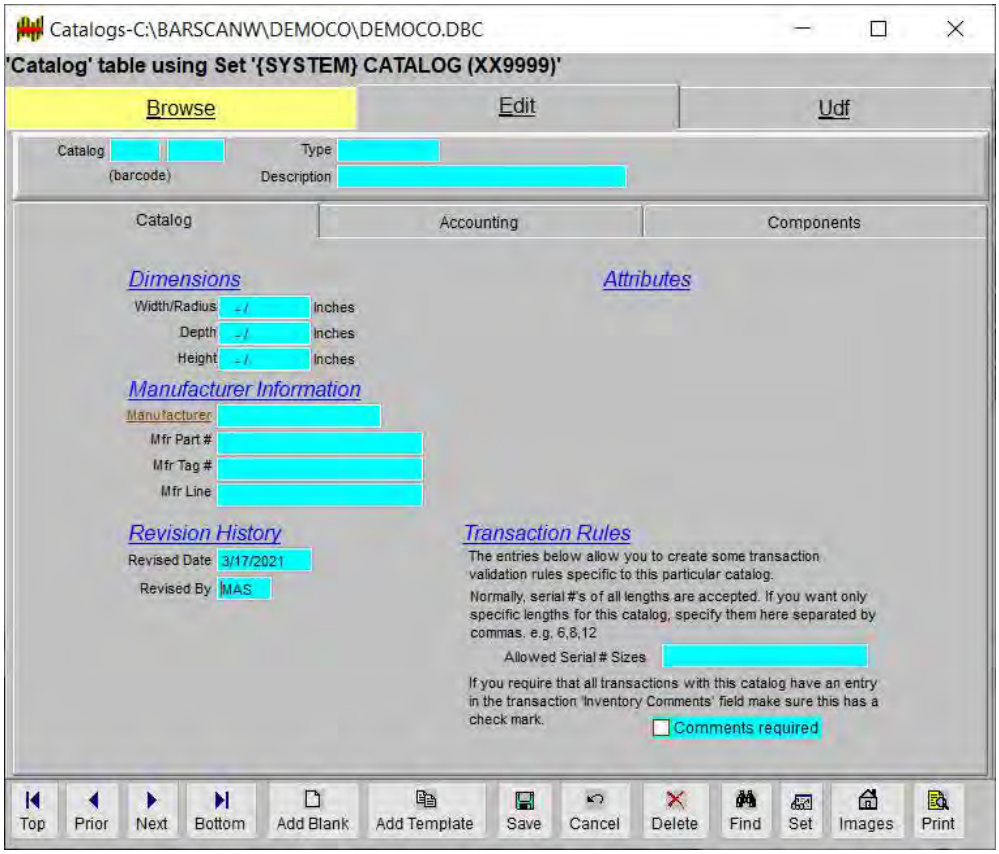
Using the training sample "NEW CATALOG DATA COLLECTION SHEET," you will now enter a new Casegoods catalog from scratch.

Click on the Edit Tab with the mouse. You will be presented with an Edit panel that looks similar to the one below.

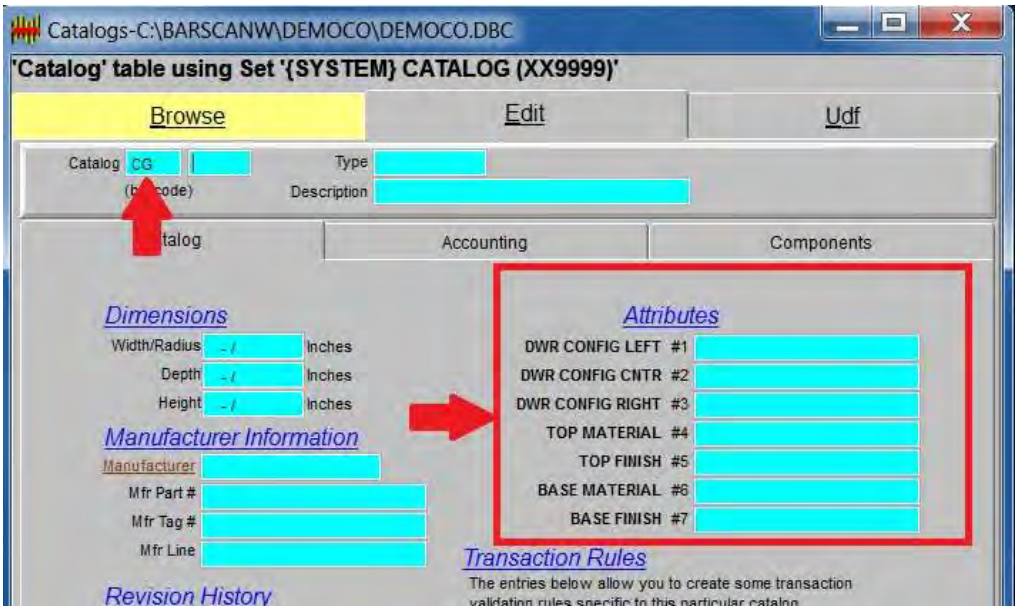
Entering the New Information

After selecting a blank screen, move the cursor to the first input field to the right of the word Catalog.

Now, using the NEW CATALOG DATA COLLECTION SHEET supplied as part of the training, let's enter the sample Casegoods catalog "CG1000" from the form.



Type **CG** and wait. Bar|Scan will prepare the screen for Casegoods. Notice that the appropriate Casegoods attribute names will be displayed.

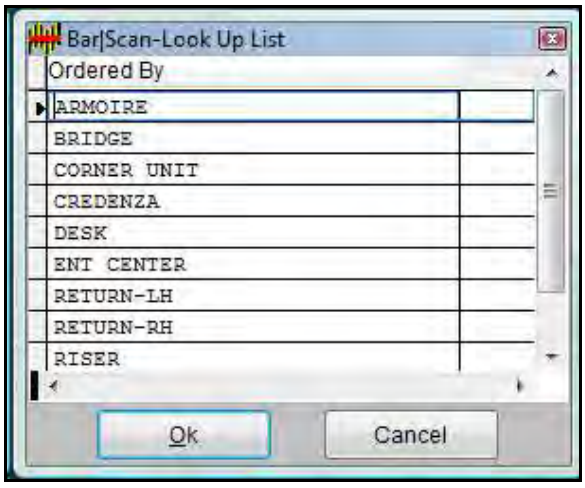


Hint: If you are not totally familiar with the different categories and their codes, press the right mouse button when the cursor is positioned at the first data input field, and select Look up Value.

Select Look up Value and Bar|Scan will display a Look up window that will look like the one below. After looking them over, you may select CG by selecting CG and double click on it, press the Enter key, or click on the OK button.

Now type **1000** at the next field titled barcode. The cursor will be positioned in the Type field.

Press the right mouse button when the cursor is positioned in the Type field, and wait for a menu. Select Look up Value and Bar|Scan will display a Look up window will look similar to the one below.

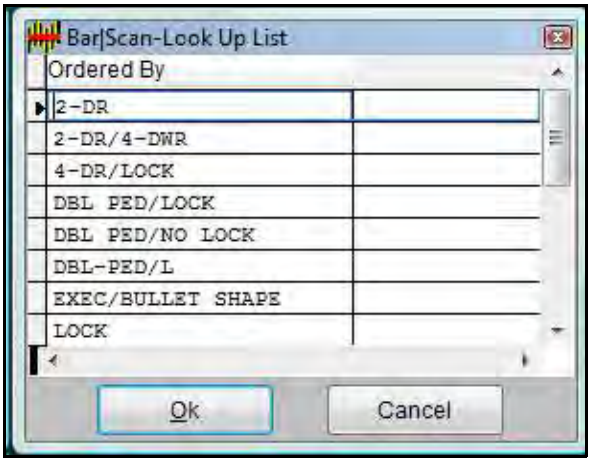


You are requested to enter a type for the new Catalog item. Usually this type is one or two words that generally describe the Catalog item. Further and more detailed information is entered using the *Description* and *Attributes* entries.

Complete your selection by clicking on the word DESK, then, double click on it, press the Enter key, or click on the OK button.

Note: if you make an incorrect choice and you have selected OK to accept it, you can change it by placing the cursor back onto the type field, again press the right mouse button and select Look up Value, and simply choose the correct response.

You are now ready to choose a description. With your cursor on the description field, press the right mouse button and select Look up Value again. (The Description entry provides space for up to 25 characters which is used to further describe the new Catalog item.) The following Look up Window will appear.



Select SGL PED-L/LOCK - left as noted on the NEW CATALOG DATA COLLECTION SHEET (SGL PED-L). You will need to scroll down in order to see the Sgl Ped- L entry. When finished, press OK.

For many assets, size is an important part of their description. Bar|Scan provides space to enter the three dimensions: Width, Depth, and Height.

Dimensions are entered in inches and fractions of an inch. Three digits are provided to permit entries of up to 999 inches. Fractions are permitted, but we recommend you use only multiples of 1/4", because getting too technical on the measurements can cause you to have duplicate catalogs to describe the same piece.

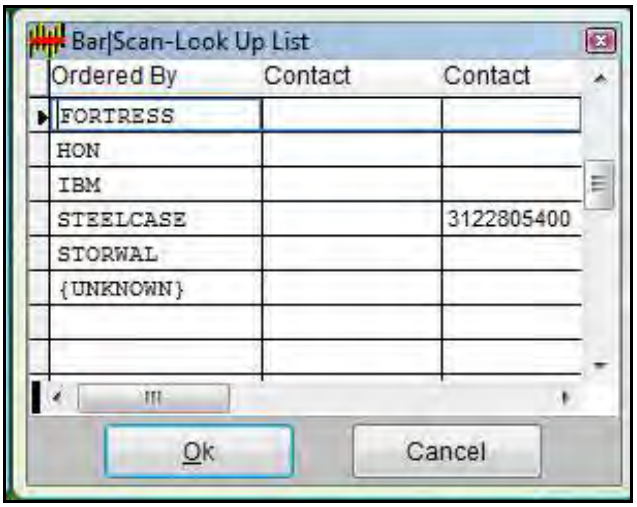
If you are not already on the Width field, use the tab key to go to the Width data entry field. Type the Width/Radius as 69, press the Enter key. Type the Depth as 36, press the Tab key. Type the Height as 29, and press the Tab key.

Hint: You may use the arrow keys to move within the fields.

Bar|Scan provides a list of many manufacturers from which to choose for each Catalog Category. You are now ready to enter the Manufacturer information.

If your cursor is not on the Manufacturer data entry field, press the Tab key to go there.

When you press the right mouse button and select Look up Value, the following Look up Window will appear, as shown below.



The list of manufacturers appearing in the above will depend on the Catalog Category you have selected, i.e., the manufacturers are grouped according to the Category.

Select STEELCASE from the list in the window and press OK. Remember that you may be able to speed up this process by typing the first couple of letters of your selection, ST, and then using the cursor movement keys, or mouse to select the one you want.

You may now complete the balance of the information. Since desks rarely have more information for manufacturer, you may use the down arrow to go past the rest of the Manufacturer's section of this panel. You are ready to begin filling in the attributes for your catalog.

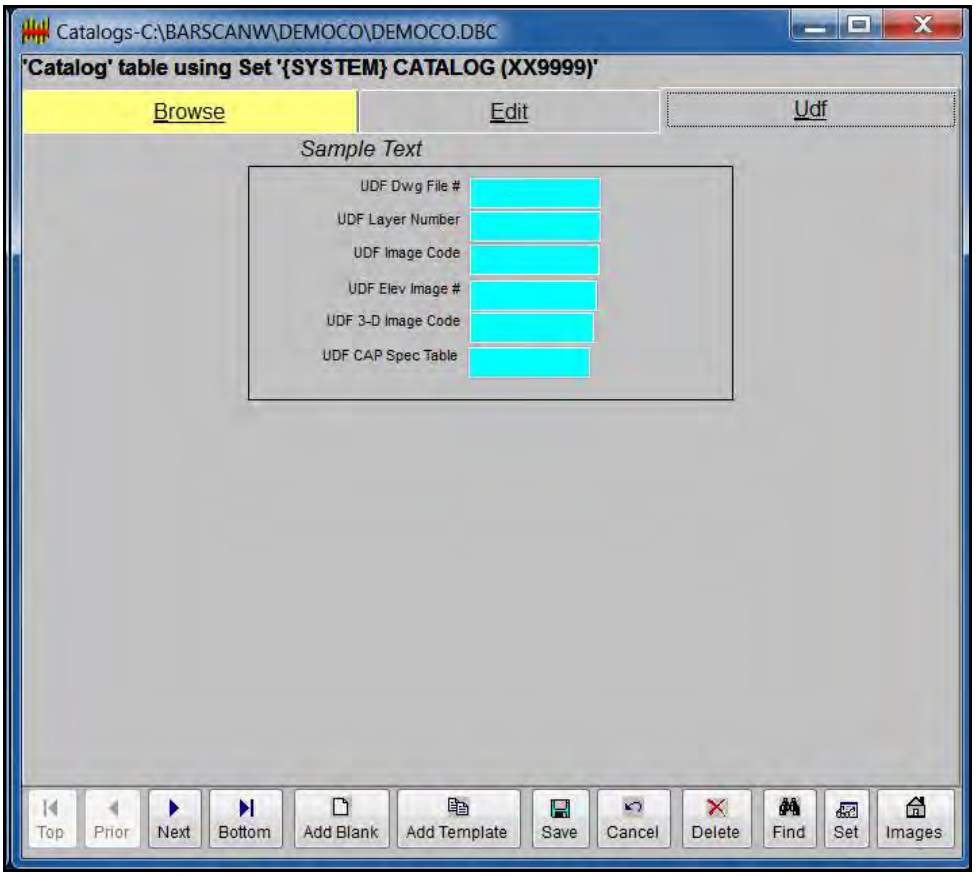
You want to enter the left side as 2BX/1F. (Use the right mouse button to see the Look up Window and make your selection, remember you have to click on your choice twice, or select it and then press the OK button).

You are now familiar with the process of picking the right mouse button to see the Look up Value, and how to choose your information. Try now to finish the last five attributes, choosing Wood as the Top and Base materials, and Cherry as the Top and Base Finish.

Hint: Since the desk has no center drawer and no right side drawer configurations, simply press the down arrow key to find and select {N/A} for these attributes.

Optionally, if the date does not yet exist, type in today's date in the Revised Date field in the following formats: MM/DD/YY or MM/DD/YYYY. Type your initials in the Revised By section.

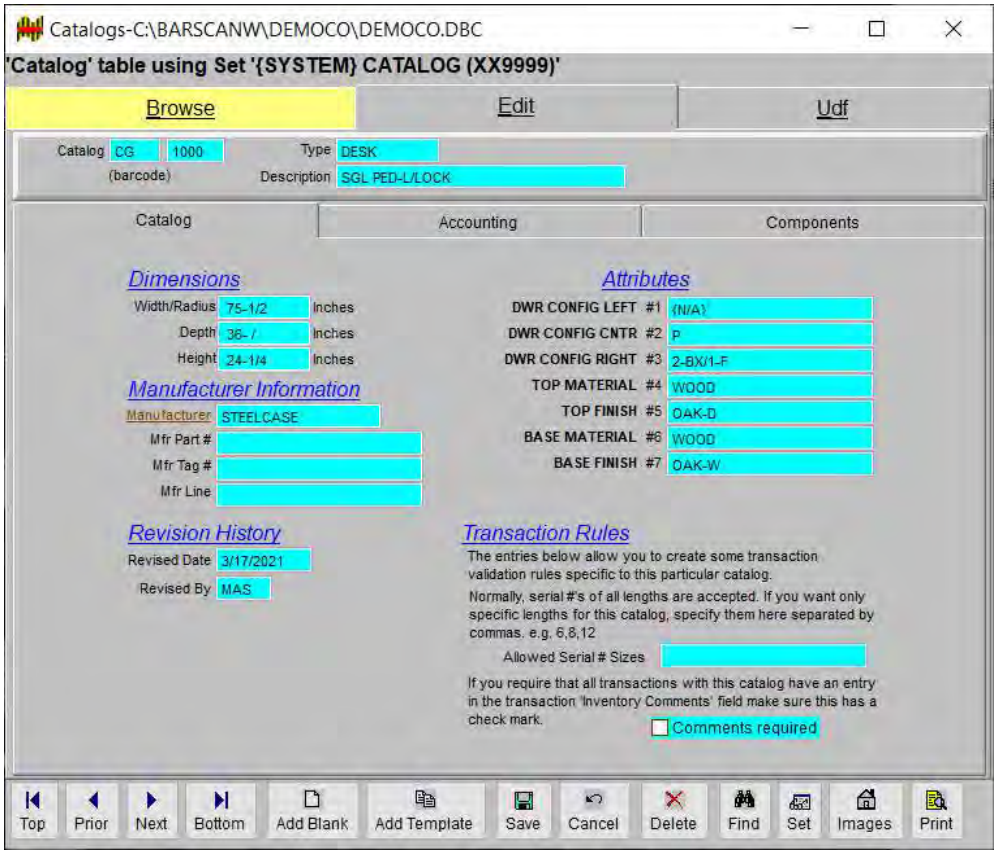
Click on the UDF Tab with the mouse. You will be presented with a new Catalog Display Screen. This screen may be different in your real company depending on your selection of User Defined Fields. Also, if you do not have the User Defined Fields module, or if you have not added any User Defined Fields to your Catalog table, this tab will not appear.



This is what we call the User Definable fields. If you purchased the User Definable Fields module as part of your system, you could add fields for any extra information that you want to collect.

Since this is not necessary for this tutorial, we are not going to spend a lot of time to explain this screen. Simply click on the Edit Tab with your mouse, again.

Your new catalog should look like the one below, except the revision date and initials should be different.



Press the Save button on the tool bar, or press the Ctrl + S key combination to save your catalog. You will then see a dialog box similar to the one below.

We recommend that you choose No, so that you can redo this part of the tutorial without having to reinstall the tutorial database.

Note that the window above asks if you want to save "Changes" to the Catalog, even though you were adding a Catalog. This happens because, you added a Blank Catalog when you pressed the icon on the tool bar, after that, you were making changes to the Blank Catalog.

Select the Cancel Changes to Select Catalogs icon from the toolbar. It looks like the icon below.

You will be asked to confirm your choice to cancel the changes.

Press the X at the top of the Catalog table to close it. You should again be at the Main Menu.

You have now completed this portion of the tutorial. Press the X button at the top right of this panel to close the Catalog window.

You will again see the Main Menu.

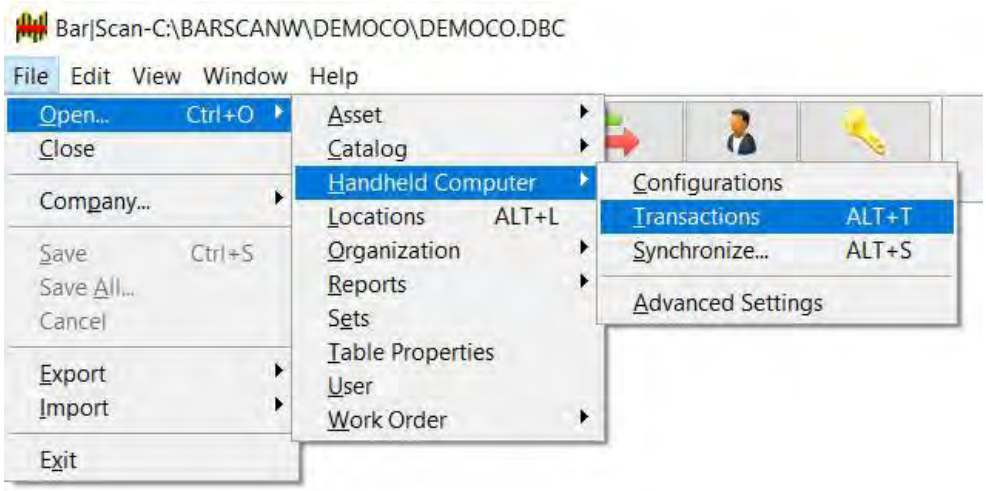
TRANSACTIONS

The Bar|Scan Mobile records the asset information which will be transferred to, and entered into the Asset table.

The information transferred from the Mobile Device during synchronization is temporarily placed in what we call a **Transaction Table**. This table will hold the information transferred from the Mobile Device until the information validates as being correct, and optionally has been printed out and marked as printed.

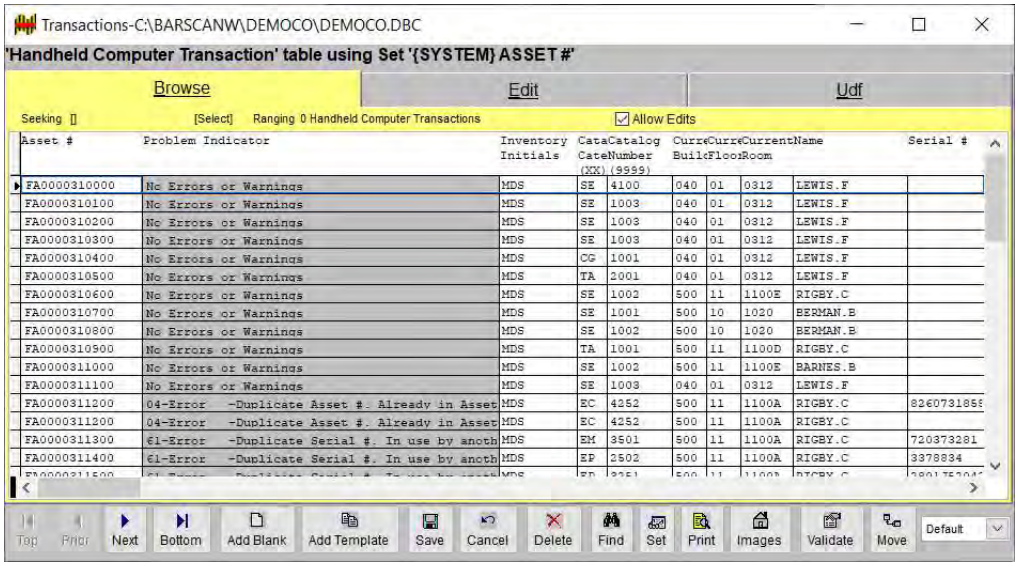
Let's proceed with our step by step tutorial to correct asset information in our Transaction table.

Select Transactions from the Main Menu. Select File . . . ▸, Open . . . ▸, Handheld Computer. . . ▸, Transactions as shown below.



Or, if you have added the Table toolbar to your Main Menu, you could click on the Transaction table icon, which is shown below.

You are now presented with the Transaction table, with the Browse panel selected.

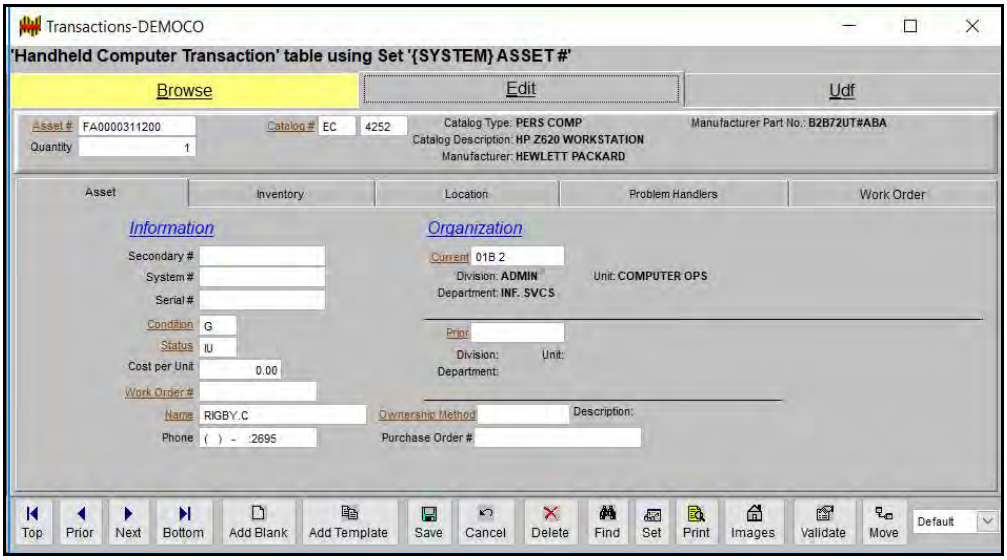


This screen displays all of the assets that information was collected with the Mobile Device.

Since we have already experimented with how to move and select from the Browse panel, let's put it to the test. Move your cursor to and select asset number FA0000311800, and then select the Edit tab.

Did you select the asset by typing the number or by moving your cursor with the cursor movement keys? Hint: in a large list it is faster to type in the asset number to search for the matching asset.

The Edit tab for this asset is shown below.



Bar|Scan checks for over 90 different types of logic errors. This is done in what is called the **Validation** feature. As it checks for each of these items, Bar|Scan will place a message in the Transaction table, on each asset. Once validated, each asset will have at least one message. The message will either list the problem(s) or it will say “No Messages or Warnings exist”.

To Validate the entire Transaction table you can select the Validate Selected Mobile Device Transactions, All if None Selected icon on the bottom of the Transaction table which is shown below.

Or, with the Transaction table open, move it slightly so that you can see the Main Menu. Left click on the word Transaction (between Panel and Help), and select Transaction ... ▸, Validate ... ▸, All.

Bar|Scan will begin the validation of each Transaction, and show a small window which displays the details of the validation. You will see how many items were validated, how many had warnings, how many had errors, how many did not have errors.

When the validation has completed, return to the Edit tab of the Transaction table, and select the Problem Handlers tab.

The Problem Handlers tab is shown below. This is where any and all messages concerning the validation will appear.

This item is provided to identify many problems with an asset record in the Transaction table. Each Transaction can have more than one error, but most will not have an error.

There are many possible messages which may appear in this window. Each message may require a different corrective action. In some cases, you might only have to correct an obvious misspelling, in others you may have to remove the asset record from the Transaction table (a duplicate).

You may correct an error only to find (when you Save the changes by choosing the Save button) different errors are now presented. Bar|Scan does extensive checking to prevent you from entering the wrong information into the system, or from destroying good information in the system.

As long as there are problems in the message box like above, the asset record may NOT be transferred into the Asset table. You will have to first correct the problems.

The message “No Problems or Warnings in List” indicates that Bar|Scan has found no problems with the asset record and it may be transferred into the Asset table after all changes have been made, it has been printed out, and marked as printed. You may make changes or corrections even if this message is displayed.

When you make a change to an asset record that previously had no problems, the record is automatically validated, but it MUST be reprinted BEFORE it can be transferred to the Asset table.

When you subsequently validate, print, mark the Transactions as having been printed, then select Move, all asset records with this message will be transferred into the Asset table, with one exception, the "Hold" feature. We have placed all of the Transactions in the Democo on Hold. You can see this on the Problem Handlers tab, as there is a check mark in the box next to Hold this Asset. By checking this feature, Bar|Scan will not allow the transaction to be moved to the Asset table, until the check mark is removed.

Remember: Any correction(s) you make in your own company will not be completed until you save your work by pressing the Save button, or until you select any of the other methods of saving, and respond (Y)es to save the changes. We are purposely avoiding use of the Save feature - as it would change the demonstration database. This way, you can step through the tutorial again.

When on the Edit tab, you can view the next Transaction or the prior Transactions, simply by clicking on the Next Item and Prior Item buttons on the tool bar, or by pressing the Page Up or Page Down keys. Also, you can move to the beginning or end of the transactions, by clicking on the First Transaction or the Last Transaction buttons on the tool bar.

Try moving between Transactions by using the Next Item and Prior Item buttons. Look at the different types of messages that appear on the Problem Handlers tab.

Find Asset number FA0000311200. This Asset number appears twice, and each of these transactions has a message on the Problem Handlers tab that says it is a duplicate on both. Someone apparently scanned this item twice.

In order to correct these errors, the information from both transactions would have to be reviewed, and the incorrect one should be deleted.

Sometimes, in using the Tag mode, the duplicate Asset is in the Asset table, and it is harder to determine why someone did the inventory of this item again.

Look at the Asset tab, the Inventory tab, and the Location tabs as well, so that you get a good idea of how the information is separated by between tabs in Bar|Scan.

Adding a Blank Transaction, Adding a Template Transaction, and making Changes to the Transaction table works exactly like you have already done in the other tables.

So, practice moving around in your Transaction table and try to Add a Template Transaction on your own. Click on the Save button, but remember to respond No, when asked to really save the changes to the transaction.

Try making a change to a Transaction that has a Location that is not in the Location database by right clicking while in one of the location fields, and selecting Look up Value, then a real location. Click on the Save button, but remember to respond No, when asked to really save the changes to the transaction.

Note: In your own database, a message that appears in the Problem Handlers section saying that the Location is not in the Location database, usually means that someone entered the correct location by hand, incorrectly according to the database, or that the location is correct, and needs to be added to the Location table. When you are working with your own locations, however, it will be much more apparent which one is correct. For our exercise though, it is enough to learn that you can right click on a field, select Look up Value, and be shown a list of all of the locations that are currently in the Location table.

You are now finished with this portion of the tutorial. Press the X button at the top right of the Transaction table to close this panel.

ASSETS

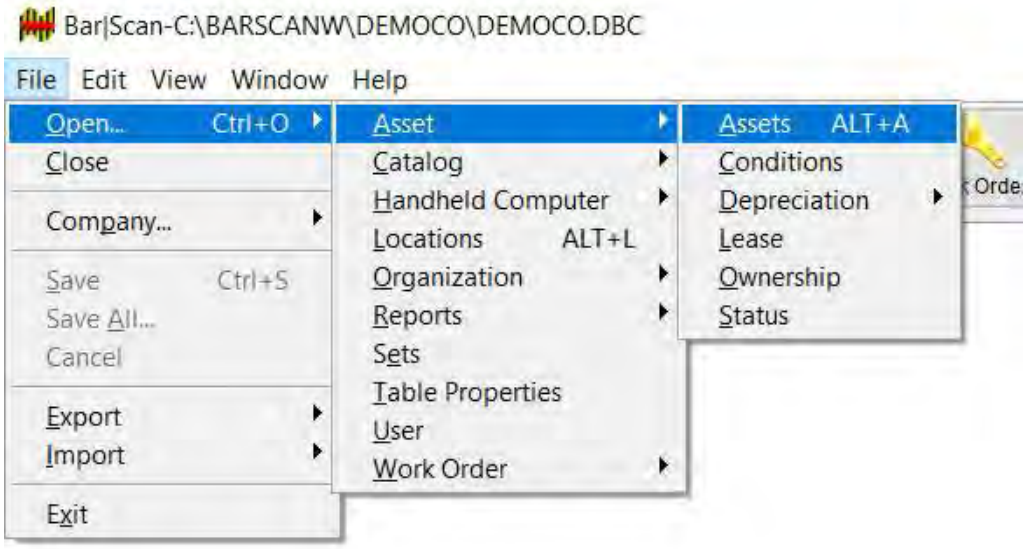
At the heart of the Bar|Scan system is the list of your assets, and the associated asset information.

We have saved working with your assets until the end of this tutorial because the asset table is the largest and most “feature rich” portion of the system.

You should already be familiar with many of the Bar|Scan features and conventions, having worked with Organizations, Locations, Catalogs and Transactions.

Assuming that you understand the basics of Bar|Scan cursor movement and editing, let's proceed with our step by step asset tutorial now.

Select *Assets* from the *Main Menu*. Select File . . . ▸, Open . . . ▸, Asset . . . ▸, Assets as shown below.



Or, if you have added the toolbar to your Main Menu, you can simply click on the Asset icon, which is shown below.

You are presented with the Asset table, with the Browse tab selected. Note: the columns that are available, and their order, are selected by the individual user, so your table may appear slightly different from ours.

The SET feature allows you to order and identify a smaller, more manageable group of assets from which to select, e.g., only those assets in a particular location or only those assets made by a particular manufacturer, etc.

As the number of assets on your system increases it becomes more time consuming to look through the entire list of assets displayed on a look up window.

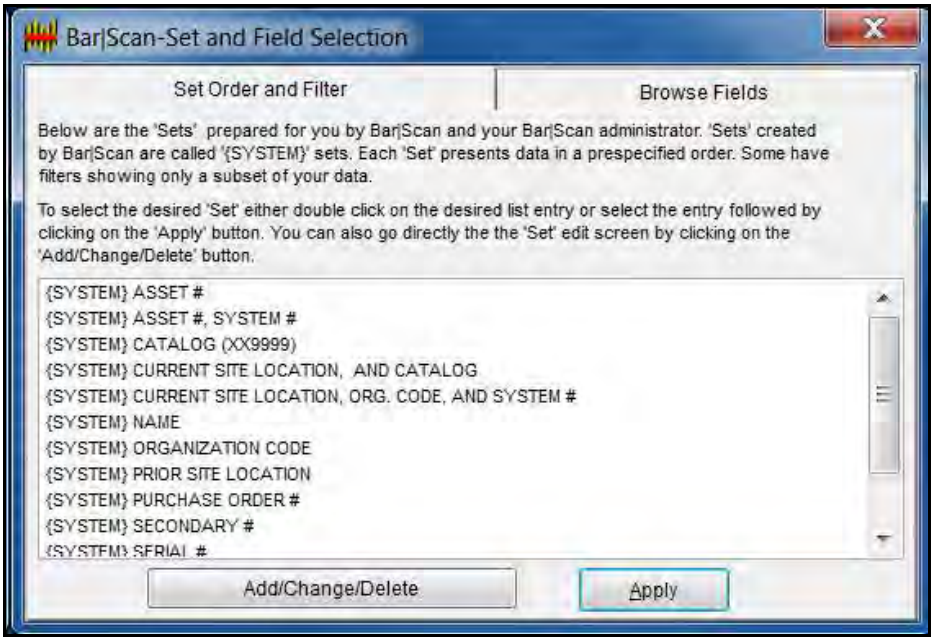
SET allows you to order or “sort” your assets by any item in the database. This makes it easier to find assets.

SET also allows you to change the columns seen in the browse window.

Because SET offers almost endless possibilities for identifying groups of assets, we strongly recommend that you experiment with different specifications to become familiar with this feature. Experimentation with SET will NOT cause any change to the information recorded for any asset. It merely specifies the sequence of asset selection lists.

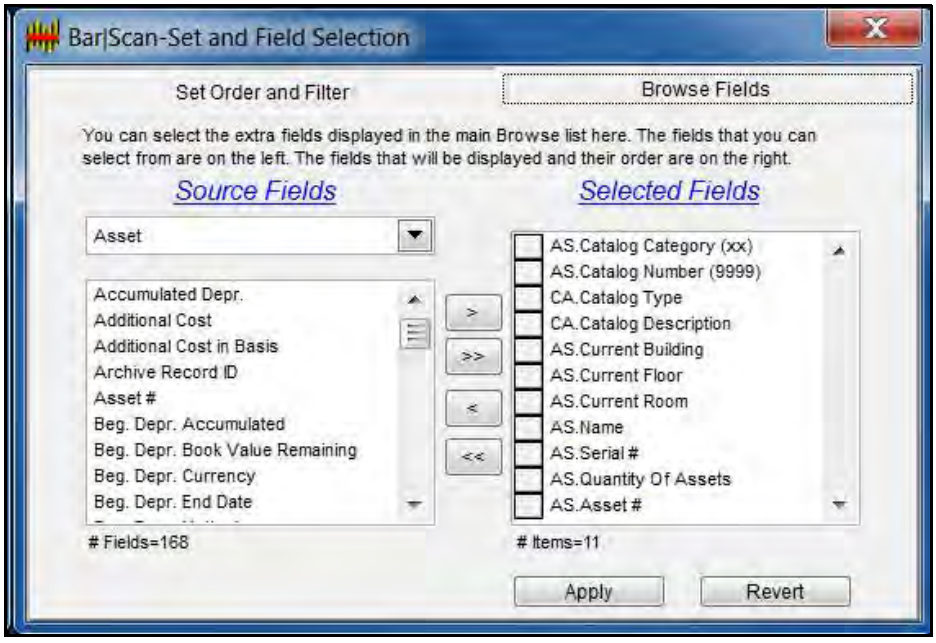
When you want to view your assets in an order other than by asset number, select SET, by clicking on the button shown below.

This button activates the Set feature, and the following screen will appear.



This Set Order and Filter tab, shows a list of Sets that are pre defined in the Bar|Scan system. You can, however, define additional Sets. Simply click on the Add/Change/Delete button shown above, and the Sets table will open.

If you would like to see the browse fields (these are the items that appear as columns on your Browse tab), select the Browse tab. When you select the Browse tab, you will be shown the following screen.



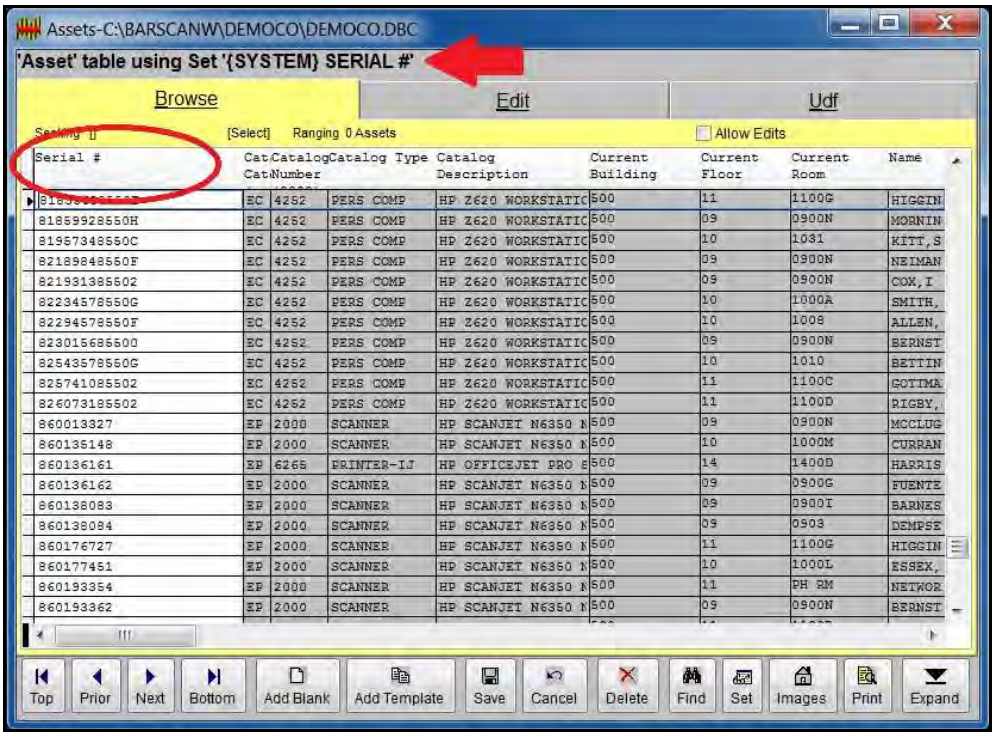
The first field on the left side of the Browse Fields tab, says Asset and there is a ▼ to the right of it. This signifies that the fields listed below are stored in the Asset table. If you needed to access any of the other tables in your Bar|Scan system, you would simply click on the down arrow, and a drop down list would appear, revealing all of the other tables. When you choose a different table, the fields listed below it will change to reflect the available fields for the new table.

Again, on the left side of this screen is the list of all of the available fields for the Asset table that you may display on your Browse panel. On the right side of the Browse Fields tab you will see the current fields that are being displayed as

columns. These fields are displayed for all of the different Sets, with the exception of the first column, which displays what the information is sorted by. Each individual Set can also have a filter set up to filter out items that you do not wish to see.

The Set feature is a powerful tool, and should be experimented with. Note: the items that are chosen to be displayed from the right side of the above screen can be moved to any order you desire here, as well as while being displayed.

In order to better demonstrate this concept, select one of the pre defined Sets from the Set Order and Filter Tab. You will see the items on your Browse tab sorted by a different criterion, but the same columns should appear with the exception of the first column–which displays what the table is being sorted by.



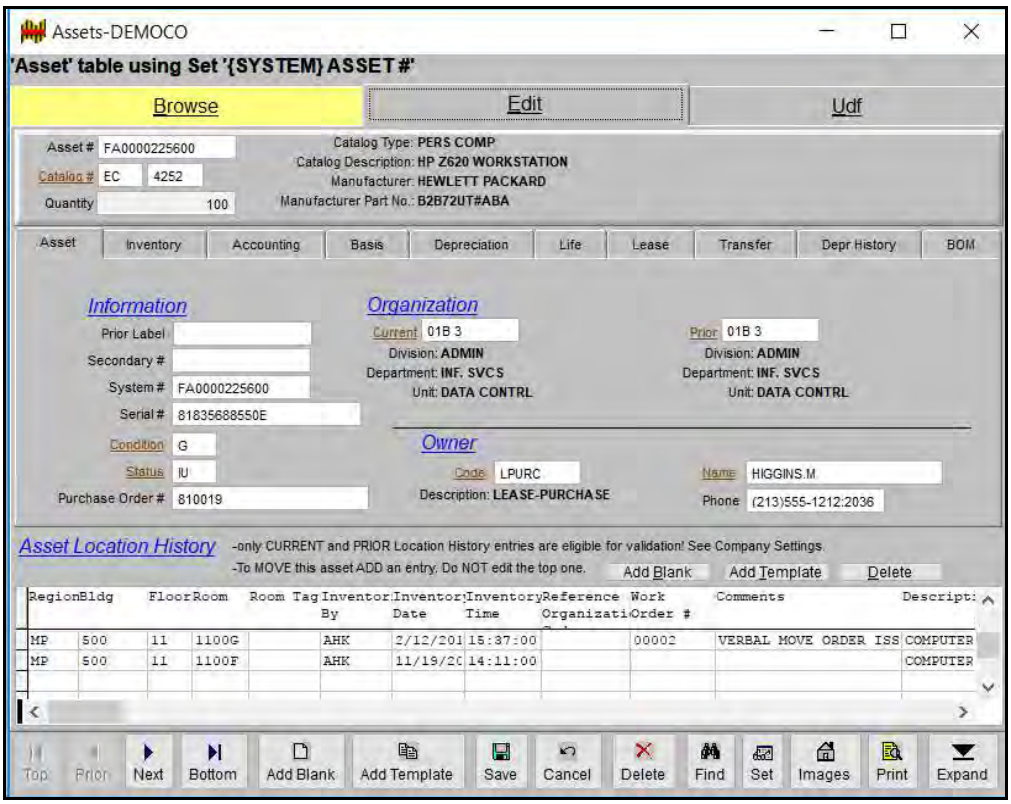
For the information displayed above, we chose the Serial Number Set. Notice that the first column is the Serial # and the rest of the columns are still the same as they were when sorted by Asset number, i.e., Catalog Category, Catalog Number, Catalog Type, Catalog Description, etc. The only column that changed was the

sort by column, the first column displayed. A sort can contain more than one column. No matter what the sort of the list, the rest of the columns stay the same.

Changing the Order of the Columns Shown in a Set

If you don't want to view the Serial number twice, you can move the second Serial number column by clicking on its title with your left mouse button, holding the mouse button down, and moving your mouse to the right or left. The columns will move to fill in the gaps as you move your mouse. This is a useful tool and much faster than respecifying the columns for a Set. Practice moving the columns with your mouse.

When you want to see the detailed information that has been entered into the Asset table, you will need to select the Edit tab. When you do, you will be shown a screen like the one below.



Every field on this screen can be entered at the keyboard, but most can be collected by using the Mobile Device. It is assumed that most of the items will be entered by using the Mobile Device, and synchronizing to the Transaction table.

Note that this tab has ten tabs on it as pictured below.

Each of these tabs contains fields for information about the assets. If, however, your company has not purchased the optional Accounting module, you will not be able to access all of the tabs shown above. Some of the tabs will appear with light grey letters (called being greyed out) and you will not be able to access these tabs.

Click on each of the tabs, to review the type of information that each contains.

Any of the items that appear in red and have a red underline are items that have a hyperlink feature. If you left click on these items, you will be able to view the information for that item in a look up window.

Practice moving from Asset to Asset using the Next Item button and the Previous Item button from the toolbar.

Practice selecting different Sets, seeing how the information can be sorted in different ways.

Practice moving the columns around.

Practice adding a new column to the Browse panel.

You are now finished with the tutorial.

Click on the X at the top right of the Asset table to close this window. If prompted to save any changes, remember to respond No, so that you may go through this tutorial again, without having to make changes.

SECTION 2 - BAR|SCAN MOBILE TUTORIAL

INTRODUCTION

In order to properly familiarize yourself with the nuts and bolts of utilizing the Mobile Device and synchronizing information, please see *Chapter - 11 - Bar|Scan Mobile* in this User Manual.

This section assumes that you have reviewed and understand the information presented in that chapter.

Bar|Scan supports a number of different models of devices, this tutorial is designed for the Android devices. However, all of the concepts are the same no matter which model you are using since each can collect the same information

If you take inventories only on an annual basis, it may be helpful to review the materials in this section before beginning the inventory process.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

TUTORIAL SUMMARY

The tutorial consists of step by step instructions for you to experience the different features of Bar|Scan. It is presented in the order in which we recommend learning about the device.

Our objective is to show you features that we want you to be familiar with. You may not use some of these features in your asset management program, but you should be aware of them.

We will be reviewing the following topics in this tutorial:

√ Using the Sample Menu Reports
√ Using the Mobile Device
√ First Time Tagging
√ Taking an Inventory
√ Synchronizing the Mobile Device
√ Printing and Checking the Transaction File
√ Concluding the Tutorial
√ Preparing for A Real Inventory

USING THE SAMPLE BAR CODE MENU REPORTS

The laminated Sample Menu Reports supplied with your system are useful for training. They **ARE NOT** required for an actual inventory. Here is why. When you perform your actual inventory, you can download all of the information contained on the Menu Reports into your device. This happens automatically each time that you Synchronize.

Our experience has shown that using printed Bar Code Menus can be an advantage in some situations and a hindrance in others. Once you learn the inventory process, you will be able to determine their usefulness in your situation.

Using a location menu report can make the tagging process easier. To create your own location menu report requires that you have entered all of the known locations into the Bar|Scan system prior to tagging. Then, before the inventory actually begins, you would print out a Location report, adding a bar code to every field that you wish to be able to scan. There are examples of these types of reports already in Bar|Scan that you can later use as a template, to make creating your own report faster and easier.

We have added some new locations on our menu report that are not contained in the demonstration database. We added these new locations to the menu report just to make this tutorial easier.

You will need to use the sample menu reports (laminated sheets) along with the device. We included one of each of the menu reports required for the tutorial with your Bar|Scan system.

You can photocopy the menu reports and use the photocopies. Your device should be able to read the bar codes on the copies. If not, it may be due to the quality of your copies. Are the bar codes on the copies sharp and well defined?

The Menu reports are simply reports, if you would like to see how to create similar reports, please see *Chapter 10 - Report Table* in this User Manual.

If you have a printer, you can print additional reports for your use.

USING THE MOBILE DEVICE

The Bar|Scan Mobile program in your device can be configured by you to prompt or not prompt you for information. For example, you may not want the device to ask you for an asset's serial number if you will have no need for this information.

For this tutorial, we recommend that you use the configuration named "{SYSTEM} ANDROID MOBILE". The configuration name will be displayed on the Bar|Scan Mobile Main Menu.

It is not important for this tutorial to select particular options. Feel free to configure your device to the way you would when starting your actual inventory.

Please see *Chapter 11 - Bar|Scan Mobile* in this User Manual if you are not familiar with your device.

FIRST TIME TAGGING

You will need the laminated sample bar code menu reports supplied with Bar|Scan. These (or copies available on the installation CD) are located in the Bar|Scan Supplemental Box supplied with your system:

Optional: If you wish to change the optional prompts in yourdevice, you may do so. This configure process is shown in *Chapter 11 - Bar|Scan Mobile*, beginning on Page 8. You will want to make sure to changed both Tag and Tag at this time. Finally, synchronize the device with the desktop Bar|Scan so that your changes are placed into the device.

Note: this exercise is using a database that assumes the you are synchronizing with the Demonstration Database. If you are not using the Demonstration Database when you Synchronize, then the data that is placed in your device will not work with this tutorial.

Begin the Bar|Scan program in your device or return to the Bar|Scan Main Menu in the device, and select *Tag (New Asset Inventory*).

When you come to the screen titled *Tag (New Asset)*, you will be ready to enter the first piece of information, your initials.

Your initials can be from 2 to 3 characters. To enter your initials, use the onscreen keyboard, or, if your Mobile Device has one, the external keyboard. When completed, press the Enter key to proceed to the next prompt.

This prompt is the “Room Tag”.

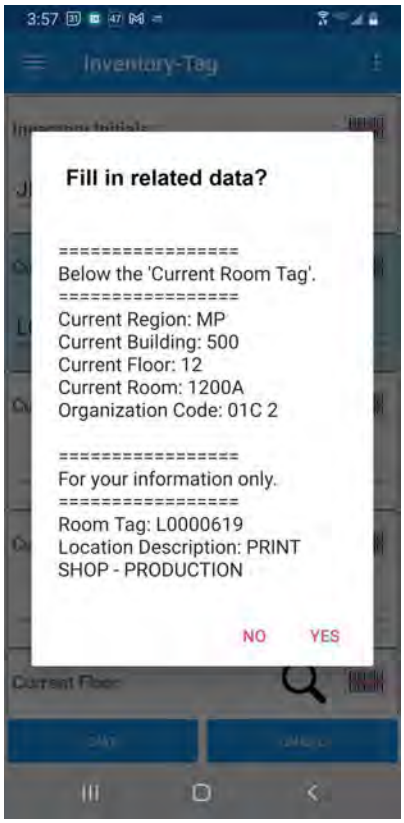
Room Tag

Room Bar Code Tags are an alternative way of identifying your locations to the Bar|Scan system. Whether or not you are going to use these tags on your own inventory, is a procedural decision that you have made or will be making.

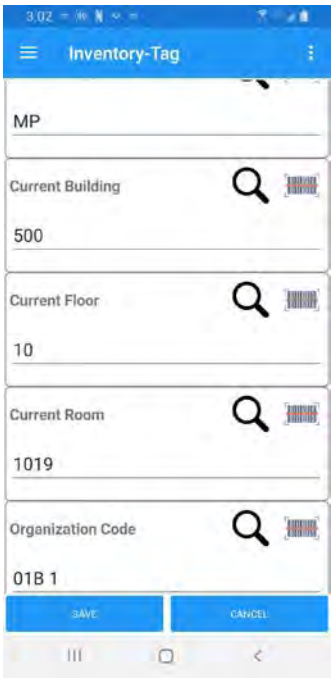
Generally, in an office environment if you are using bar code menu lists for entering your locations into the device, you will not be using room tags. Alternatively, if you are using room tags, you will not require the menu lists **except for the first time tagging process to identify to Bar|Scan the link between Locations and the Room Tags.**

When you are at the Room Tag prompt, using the Laminated Bar Code Menu titled "TAKE 2", scan any one of the bar coded Room Tags. This is the leftmost bar coded column on the menu report. You can also click on the right side of the screen in the Room Tag prompt to display the Pop-up. Scroll down to a Room Tag and select it.

You should see a screen like the one at the right. If you do not get this screen, from the device's Bar|Scan Main Menu select the Tools then About then click on the 'Misc' Tab then check mark the item to enable 'fill in'.



Select Yes. As you can see from the example below, much of the location information that you would normally collect individually has been completed for you. This is because we used the Room Tag to associate all the information in advance of your inventory.



You can see that the fields Region, Building Floor, Room and Organization have been completed for you.

Completing the Location Fields without Room Tags

As mentioned before, you can also complete these fields manually if you are not using Room Tags. You would use the bar code menu report "TAG 4" - Bar Code Location Menu /Existing & New," and scan any *Region*. This is the leftmost bar coded column on the menu report.

It does not matter which bar code you scan in this column as they are all the same. This is because the Bar|Scan Report Generator has printed a complete line for each different (unique) location and only the *Organization & Room* columns are different in this sample report.

This is not necessarily true for most location reports.

Notice that after a successful scan, the Mobile Device's cursor automatically goes to the next prompt, *Building*.

If the cursor on the Mobile Device is not next to the word *Building* on the Mobile Device, your scan of the Region was not accepted.

If you see the cursor by the word *Floor* on the Mobile Device, you accidentally have made two scans! Press the up arrow key on your Mobile Device to back up to the previous prompt.

Now scan the column titled *Bldg.* on the menu report. This is the building in which you are going to perform the tag.

Now scan the column titled *Floor* on the menu report. This is the floor on which you are going to perform the tag inventory.

If you have not already done so, stop and view the Mobile Device's display screen. You will want to make sure that the screen shows *MP* for Region, *500* for Building, and *11* for floor.

If it does not, use your up arrow to go back to these fields, and scan these again.

Now scan a selection under the column titled *Room* on the menu report. Each *Room* on the list is unique. This is the room in which you will be starting your Tag inventory.

Scan the column titled *Organization* on the menu report **ONLY** if you will be using this feature in your Bar|Scan system. Otherwise, press the enter key on the Mobile Device to leave this field blank.

Hint: During an actual inventory, you may sometimes come across something unexpected, e.g., a room not previously entered into the Bar|Scan system, and therefore you have nothing to scan. You will need to enter the information using the keyboard on the Mobile Device. This makes it is easier to correct the oversight later at the computer, and it is better than making paper notes.

Is Space Accessible?

Respond by tapping or using the Stylus to tap on the response on the screen.

A check mark in the Accessible field means that the space is accessible.

Hint: In an actual tagging situation, you may respond No (uncheck the box) if the room or area is not accessible (such as a conference room that is in use). In this way Bar|Scan can remind you later that this room was skipped.

Hint: In a warehouse environment, you will normally not use the Accessible Prompt since all of your locations are accessible.

At this point, you have entered all of the location information and are ready to get down to the business of tagging the assets.

Asset Number

Now we are going to cheat just a little on our tutorial. We do not recommend that you use real asset labels for this tutorial. We want to avoid even the smallest chance of these asset numbers getting into your real asset database.

We have created fictitious asset numbers on a menu report for you to scan instead of real labels.

Using the "TAG 1 - Bar Code Tag Asset Form /New Asset Tags" menu report, scan the first asset number.

Your screen should now look like the following.

You are finished with the location menu report.

Catalog Number

For the Catalog, you can use your stylus to tap on the Catalog response to see the pop-up window or you can use the menu report. If you decide to use the stylus, find SY4001 in the pop-up and select it.

If you wish to use the menu report, pick up "TAG 2" - Bar Code Catalog Menu /Category SY."

This is a partial list of valid Systems Furniture Catalogs for the Democo. Your Catalogs will be created by you during the Cataloging Phase of your Project.

In our imaginary room, you would see two Pedestals each with two box drawers and one file drawer. Scan the appropriate Catalog Code - but only once. Hint: the Catalog is near the bottom of page.

Additional Information

The device will ask for additional information about your asset. The rest of the items it prompts you for, will have been determined by our default configuration. Answer all of the questions, then save the asset record.

You should be on the *Asset Number* prompt again after you have saved the record.

Notice that the device did not ask for the Catalog Number of the asset. This is because Bar|Scan remembers the last Catalog Number until you back up and enter a new one. The device will assume you are going to tag another asset with the same Catalog Number.

Another Asset

Remember that we said that there were two pedestals in this room? The easiest way to tag assets in Bar|Scan is to tag all like items sequentially. This avoids having to enter the catalog number for each asset.

For example, if you enter a six-person conference room, tag the conference table, then all six chairs together.

Assign the second *Asset Number* on your "TAG 1" menu report to the second pedestal.

Hint: Scan the next asset number on your “TAG 1" menu report.

Variations

Up to this point, we have tagged two new assets. Try some variations with your device now.

Suggestions:

√ Using your finger or stylus, click on Room Tag to enter a new Room
√ Use the "TAG 3" menu report to capture some equipment
√ Go to a new location and respond NO to *Is Space Accessible?*
√ Scan any asset number on the "TAG 1" menu report twice.

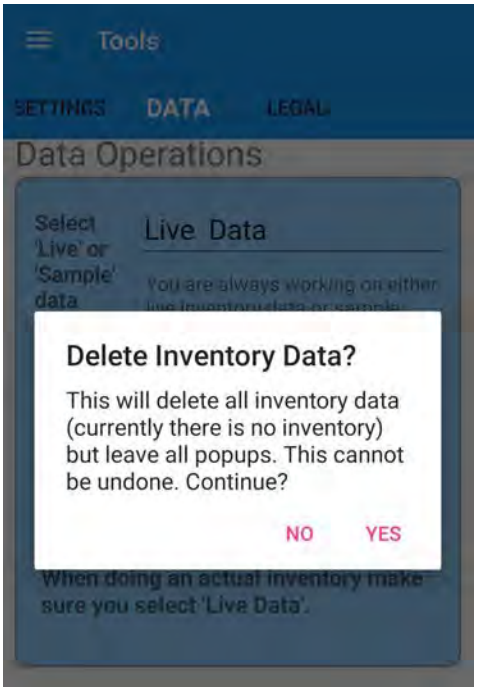
Note: Keep in mind that you are making some intentional transaction errors for later editing with this tutorial.

At a minimum, we recommend that you enter all thirteen asset numbers on the "TAG 1" report. Without enough transactions, we will not have enough to make printing of the Transaction table interesting.

When you have completed all thirteen assets on your "TAG 1" menu report, return to the Bar|Scan Main Menu on your device by pressing the Cancel Button.

You are now ready to synchronize the device to Bar|Scan on your desktop. If you do not have a computer or do not wish to proceed with the synchronization, remember to clear the data in your device.

To clear data, select 'Tools' from the Menu then the DATA Tab. Next, select 'Delete Inventory' then reply 'YES' to delete. You will see a prompt like the example below.



If you click on the Delete button, you will be shown a message that asks if you want to "Delete Inventory Data." Tap on the Yes button only if you want to erase all of your information. Tap on the No button to be returned to the Menu.

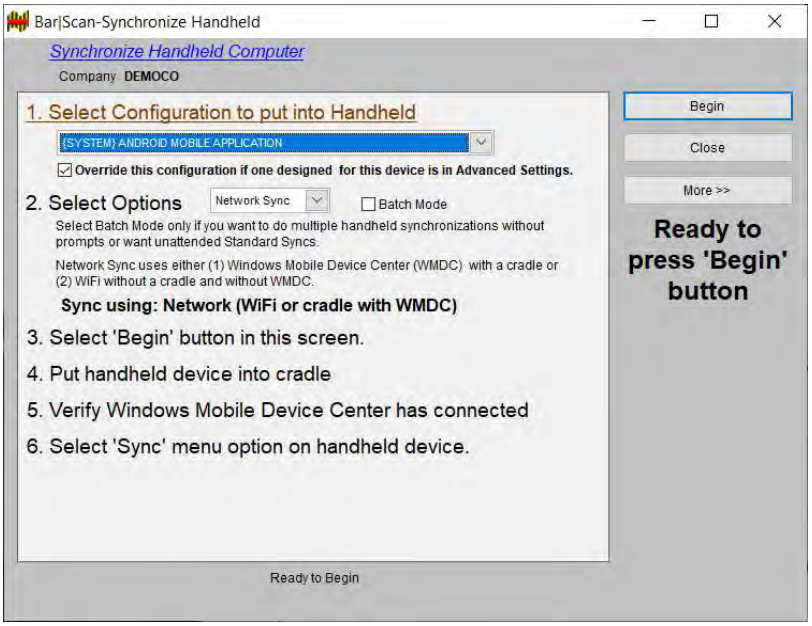
Note: It is very important to notice that this is what you do for a tutorial only. You never want to delete real assets from the device without synchronizing to Bar|Scan on your desktop, validating, and printing the inventory information first.

SYNCHRONIZING THE MOBILE DEVICE

Check the Transaction table prior to synchronizing the device to make sure that it does not contain real asset information. If your company has not yet used Bar|Scan, the Transaction table will only contain the demonstration database transactions.

Preparing for Synchronization

When you select File ... ▸, then Open ... ▸, Handheld Computer... ▸, then Synchronize, you will be shown the following dialog box.



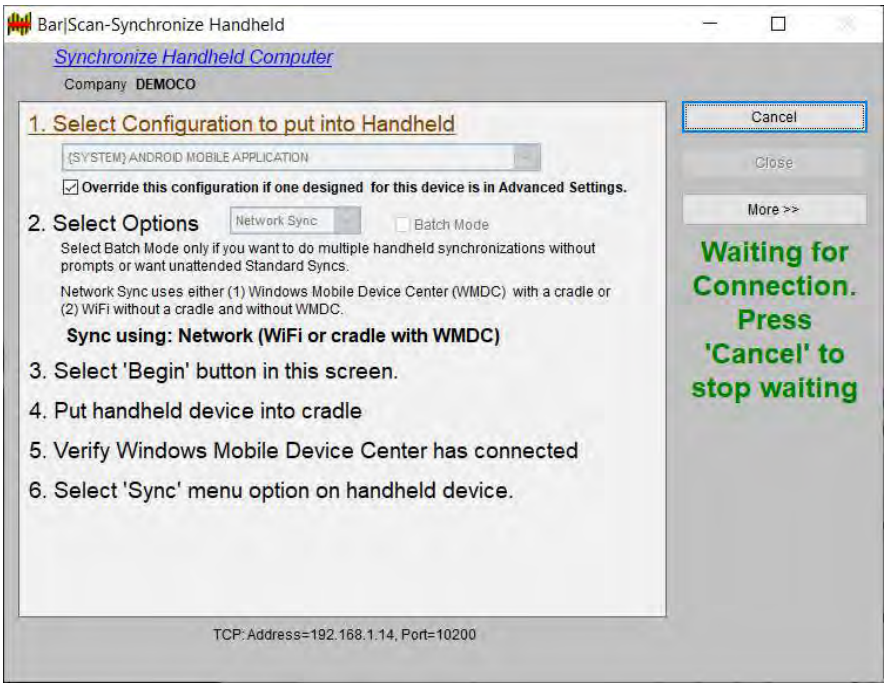
Note: You can also reach the above window by going to the Main Menu, then selecting File . . . ▸, Import . . . ▸, Handheld Computer. . . ▸, Upload, or if you have the Import toolbar on your Main Menu, simply click on the Synch Handheld icon.

You should **always** begin the synchronization process on the Mobile Device before beginning the process on the desktop.

You should now start the synchronization process on the device. On the Main Menu of the Mobile Device, select Synch. The device should display information as the synchronization takes place.

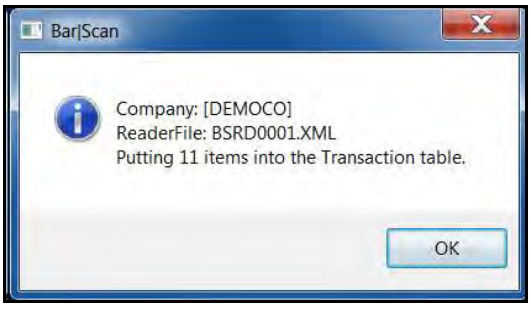
Now select the Begin button on the desktop screen.

You will see a message on the computer asking you to please wait. The computer will initialize the synchronization process, and when it is ready to receive data, your window will change slightly, to look like the one below.



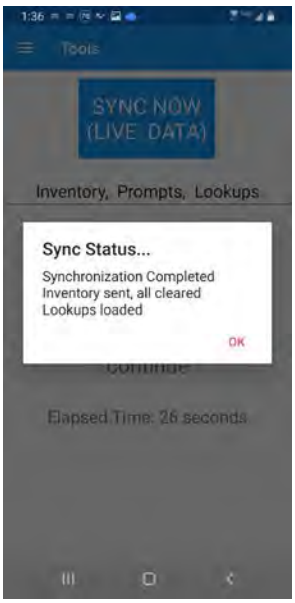
Notice that the bottom of the above window displays the IP address.

Note: If you select that you are not ready to send data, you will be shown a message asking, Clear all data? Yes or No. Select No, and you will be returned to the Mobile Device's Menu. When completed, your PC will display a message like the one at right.



Obviously, the number of items will change according to how much data you have collected with your device.

Your Mobile Device will now display a message that the synchronization is completed and your inventory has been cleared as shown below.



We recommend that you simply turn off the Mobile Device, or let it go off by itself, until you are sure that the information was properly synchronized.

You should go to the Transaction table, and verify that the assets have actually been moved into the Transaction table. Once this is done, you can return to the Mobile Device and say Yes, to clear all data.

PRINTING AND CHECKING THE TRANSACTION FILE

After the last asset record is transferred to your computer, you will need to print the Transactions to check for any discrepancies that may have occurred while you were collecting your inventory information.

After the last asset record is transferred to your computer, you will want to print the Transaction table information. To print the report:

✓ Select File ... ▸, Open ... ▸, Reports ... ▸, Bar Code Transaction from the Main Menu or press the Transaction Report Icon as shown at right.

✓ Select the System report, "{SYSTEM} ALL TRANSACTIONS BY INV INITIALS, DATE & TIME "from the Browse panel.

✓ A dialog box will appear to ask you if you wish to print this report, select Yes.

✓ Bar|Scan will perform a validation of the Transaction File.

✓ After the report has printed, a dialog box will appear to ask you if you want to mark as printed, select Yes. Then, another dialog box will appear to say Done Printing.

Review your Transaction Report.

Note: There is a column titled Problem Indicator. These are the same messages that appear in the Transaction table on the Problem Handlers tab.

Note that the error titled "Location is not accessible" technically is not an error, rather, it is a note to remind you that there was no inventory done at that location. Remember the Mobile Device prompt "Is Space Accessible?"

We will not be editing the Transaction table in this tutorial.

For more information on the types of errors and how to correct them, please see the Transaction Problem Handlers in Chapter 12 - *Transaction Table* in this User Manual.

CONCLUDING THE TUTORIAL

This concludes our Demonstration Database and Mobile Device Tutorial. If you will not be reviewing the tutorial again, you may wish to switch to your actual database.

Choose File . . . ▸, Company . . . ▸, Open to open your own company, allowing you to switch back to your real Company Database.

DO NOT REINSTALL Bar|Scan from your CD if you already have a REAL ASSET DATABASE without consulting Bar|Scan technical support.

PREPARING FOR A REAL INVENTORY

There are many things to remember to have with you prior to beginning your physical inventory. To make it easier for you, review the following checklist before your inventory.

Make sure that your Mobile Device does not have any assets in it, then check the Date and Time to make sure they are correct, put your initials into the Mobile Device, and if you will be using the Mobile Device for more than 6 hours without recharging, make sure you have a spare battery.

Know what type of optional asset information you will be expected to collect, i.e., a serial number, owner name, etc., and use this information to configure your Mobile Device for all prompts before you start, and remember to check the lengths of the Asset and Room Tags.

Have your Data Collection Sheets, Catalog Lists, Location Plans, Location Reports, etc. ready. If you have updated Bar|Scan with new Catalog or Location information, you should print new bar coded reports.

You will need your Marker Boards (Catalog Numbering Easel) and markers if you are digitally photographing your Catalogs. And remember your camera and a charger source for your camera.

Don't forget bar code Asset tags and Room tags, even if your taking an inventory. You may run across assets that are not tagged and may need to be.

Have a note pad and pencils to jot down notes. Carry a dental or other mirror and a flashlight to read serial numbers on equipment in those hard to reach places. Also, if you plan to take dimensions down, you will need a tape measurer.

You will also need room tags, if you are planning to use them during your inventory.

Remember to synchronize your Mobile Device to your real Company and not to the demonstration system.

Good Luck!

APPENDICES

APPENDIX-A

IN CASE OF TROUBLE

INTRODUCTION

If you have used a personal computer before, you know that trouble can occur in several different ways as follows:

√ If BarScan is installed on a server you may experience a network disconnect, causing BarScan on your local desktop to fail.

√ The computer or one of its components (such as the hard disk drive) can fail.

√ You can experience an electrical power failure which turns off the computer without a proper shutdown.

√ Something can go wrong with the printer causing an error.

√ You can experience problems when synchronizing with the .

√ A problem can occur while working with the Bar|Scan system.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

The following sections will discuss some of these problems and how to correct or recover from them.

PROBLEMS WITH THE COMPUTER

You will be most concerned with computer problems and failures that effect the local disk drive or the server disk drive.

One of the most serious computer problems is the failure or accidental erasure of information stored on the disk drive. This problem is the reason you back up the information stored on the disk drive.

If you experience a disk drive failure, you must first correct the problem by repairing or replacing the hard disk before you reinstall the Bar|Scan system and restore the Bar|Scan Company Tables. See the section in Chapter 3, on *Backing-up and Restoring the Bar|Scan System.*

Another problem that can affect the disk drive has become more serious in recent years and that is infection from a computer virus or malware. While most viruses do not cause damage to files, some can leave your computer inoperable. The best prevention against computer viruses is installing and using an Anti-Virus and Anti-Malware Program. It is important to update and maintain current versions of the Anti-Virus definition files for maximum protection.

Other kinds of computer problems generally do not have a significant effect on Bar|Scan. The Bar|Scan program stores information on the hard disk as you enter it. This means, as far as Bar|Scan is concerned, the worst that can happen is the loss of the information you were entering at the time of the problem.

Electrical Power Failure

Bar|Scan saves your work as you enter it. In the event of a power failure, you will need to restart your computer and restart Bar|Scan.

The first thing to do before reentering any information you had not saved at the time of the power failure is to perform a Table Integrity.

If a power failure happens to occur at the precise time Bar|Scan is saving your work, you will want to review what you were entering at the time; it could have been corrupted. Open the Table Integrity Screen and click Ok to perform a Table Integrity.

If the Table Integrity stops and Bar|Scan displays any messages, contact Bar|Scan Technical Support or your Bar|Scan Dealer. An email hyperlink is provided on the Bar|Scan Help Screen.

Trouble With the Printer

Any time you print a report, Bar|Scan assumes the printer is connected to your computer or your network and is ready to go (on-line).

If a problem occurs with the printer, it is almost always due to something wrong with the printer or Windows, rather than Bar|Scan. This is because your printer is controlled by Windows and not Bar|Scan.

If you are having a print problem, you may wish to check your Windows Control Panel and see how your printer is configured.

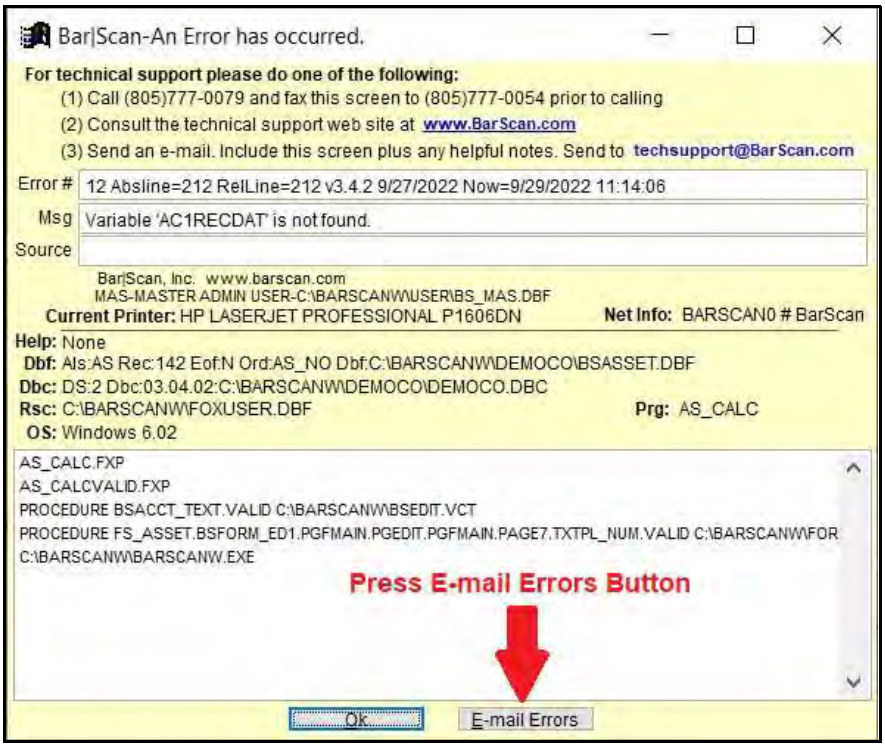
Try printing a test page, either in Control Panel's printer setting or with another application such as Microsoft Word.

Once you have checked for the correct Windows printer settings, you must look elsewhere for the problem solution. Check your printer's status and consult the printer manual for instructions.

PROBLEMS WITH BAR|SCAN

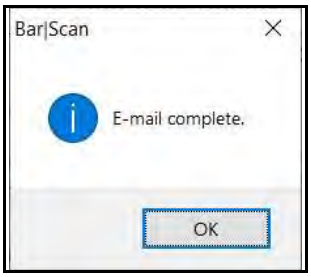
Bar|Scan contains its own error checking and diagnostic routines. If a problem occurs, information will be displayed as to the nature of the problem.

There are several levels of Errors. The most serious will cause Bar|Scan to stop and display a full size error message such as the following sample:



It is important to press the Email Errors button to capture the information on this screen and report the error to us. This can be done in a number of different ways.

The best way to report the error is to click on the “Email Errors” button at the bottom of the screen. Bar|Scan will open your email program and send the information to our office. When completed, the message “Email Compete” will be displayed as in the following example:



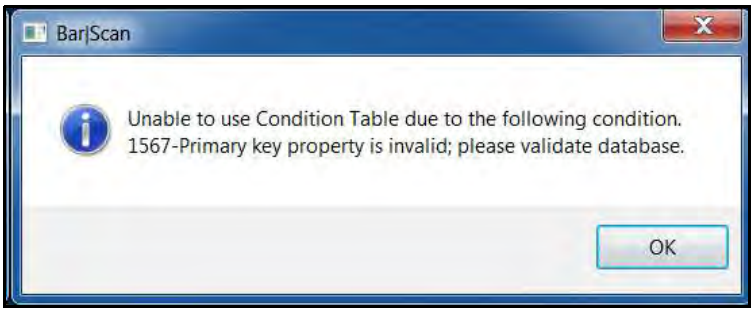
There is no need to call our office since your email will arrive in our office within minutes.

If your Computer does not have email or does not allow Applications to open your email program, you can capture the error screen and paste it into an Office document, Microsoft WordPad or Microsoft Paint.

To capture the screen, press the ALT plus PRINT SCREEN keys simultaneously. Open Paint and select Paste. Save the file and attach it to an email. Send the email to techsupport@barscan.com

There are other screens that are less serious that may prevent you from using only a portion of Bar|Scan. They normally do not close the program.

The following is an example of the error display screen provided by Bar|Scan.



If you see a screen similar to the prior screen, **immediately, before you do anything else**, press the ALT plus PRINT SCREEN keys to capture the information. Then open either Microsoft Paint or Microsoft WordPad and select paste to capture the screen. You can save the file and attach it to an email (preferred) or select print to send a copy of the information to the printer and fax the error message.

This error screen provides important information about the problem and its solution. It should be sent to your Bar|Scan dealer.

Note: You can restart Bar|Scan and select Help About Bar|Scan to locate our telephone number and/or fax or email address to send us the error display screen if your Bar|Scan dealer is not available.

If You Have a Problem But BarScan Does Not Show an Error Screen

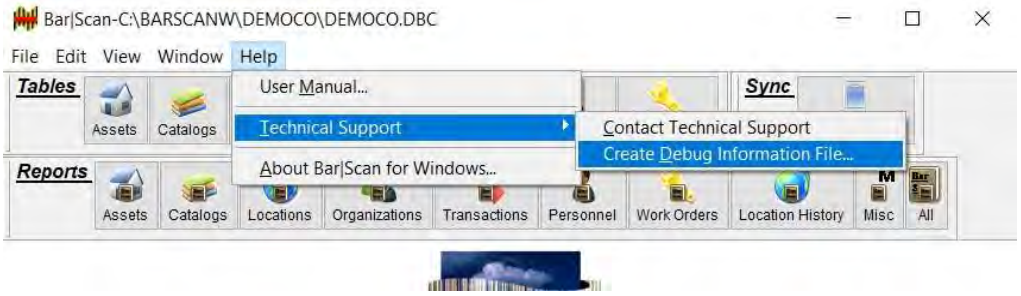
If you have a problem but BarScan does not show an Error Screen you can still send us information so that we can help you with the problem.

Normally BarScan effectively detects serious errors and will generate an error screen from which you can email a debug information file. However, there are some types of errors or conditions that can occur that do not cause BarScan to stop working. When this happens you can manually generate a debug information file and send it to BarScan if you want technical assistance.

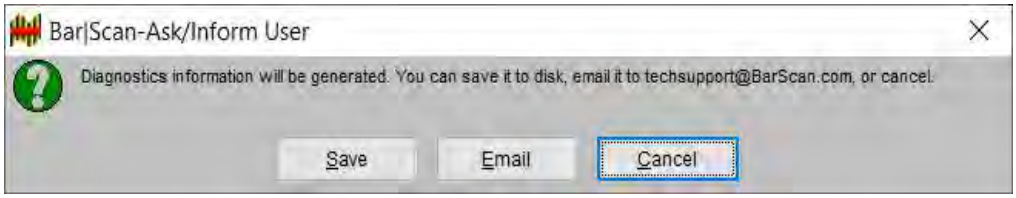
It is very important that the Debug Information file be generated IMMEDIATELY after the problem occurs. Even a few extra keystrokes or mouse clicks may cause critical information to be lost.

To manually create the Debug Information File do the following:

Select menu item Help/Technical Support/Create Debug Information File…

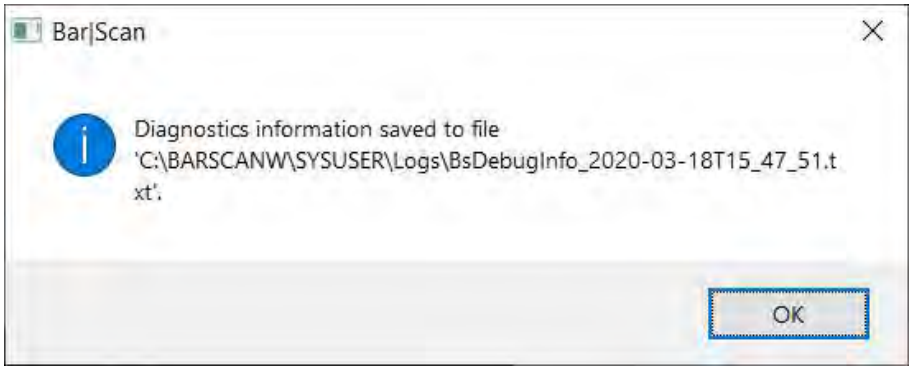


A dialog will then appear that asks if you wish to email the information or for a filename and a folder location as shown below:



This file will hold the Debug Information.

If you select Save, then you will see the location of the saved file. The file is named and includes the date and time in the filename as shown below.



Using Windows File Explorer, locate the file and then attach that file to an email reply.

Functions Which Require Exclusive Use of Tables

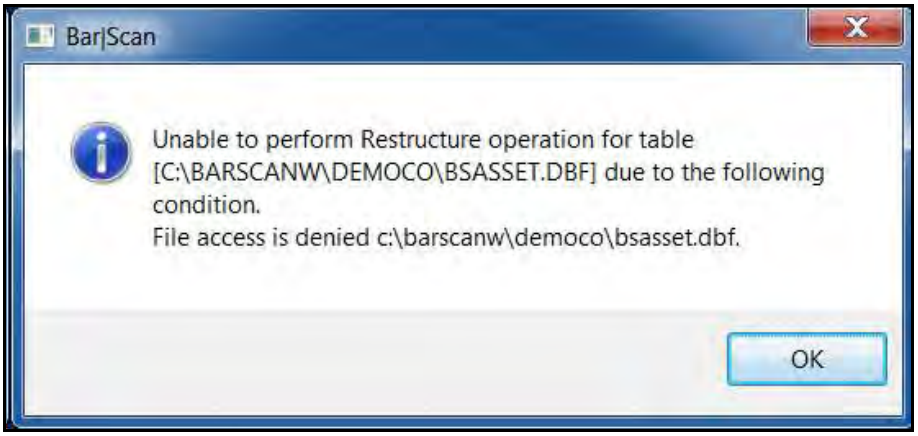
There are a small number of operations which require exclusive use of some parts of the system. This means that if you have a Local Area Network version of Bar|Scan, it is suggested that only one user be accessing Bar|Scan. Remember that when you are running the program in Windows, minimizing the program is still the same as running the program and not closing it. The operations which require exclusive use are:

- √ Maintenance on (archiving) the Activity Log
- √ Creating a new Set command for the very first time
- √ Exporting or importing information
- √ Table Integrity

All of the above operations require exclusive us of the Tables they affect. If other users are accessing Bar|Scan but are not in the same table, these functions will most likely not be affected.

Also note that an ODBC connection from another computer application is also considered a user.

Below is a sample information message notifying you that exclusive access is denied.



Bar|Scan can provide you with a list of other users currently accessing the system.

This is done by accessing the Help Panel as shown below.

Click on the “Current Users” button to see if anyone else is using Bar|Scan. Normally, Bar|Scan cannot instruct your Network to log the users out of Bar|Scan. You will need to contact the users directly.

Bar|Scan does has a scripting feature to log users out of Bar|Scan, but this is an optional setup and described in detail on the Knowledge Base section of our website.

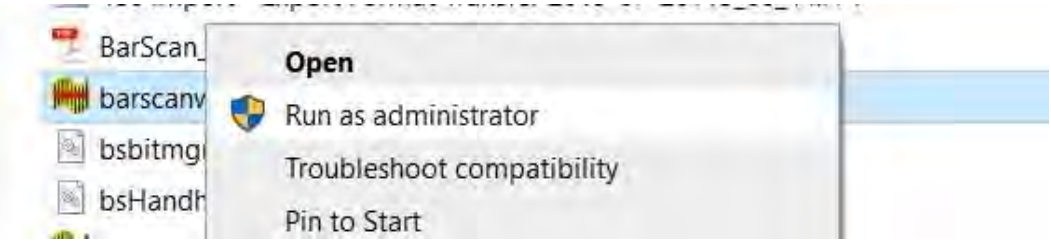
Problems During Synchronization

Anyone who has worked with computer communications knows that strange things can happen when you connect two devices together. Consequently, Bar|Scan has completely automated this process; you normally should not be concerned about possible these issues occurring.

Bar|Scan assumes that the Mobile Device is communicating via Wi-Fi unless you have changed settings from within Bar|Scan. Check to see that the your Mobile Device has Wi-Fi access and is not being blocked by a firewall.

Other problems can occur such as an interruption during the transfer of information. Bar|Scan monitors the progress and provides information and instructions to correct these problems. See the section *Get Asset Data From* in *Chapter 12 - Transaction Table* for more information and instructions.

Problems may also be cause by insufficient privileges in your Windows Account. A quick way to test for this problem is to run BarScan as an administrator as shown below.



If this resolves your issue then you can modify your shortcut. Right-click on the shortcut and select ‘Properties’. On the shortcut tab select ‘Advanced Properties’ and select ‘Run as administrator’.

Your anti-virus program can be the cause of slow response time of Bar|Scan

Anti-virus packages typically address the problem of detecting and dealing with viruses using three methods:

1. Periodic scans of files.

2. Real time scans of files (whether executables or data files) when they are activated, opened or used by a program.

3. A real time heuristic detection, where the anti-virus package is looking for suspicious program activities to detect new viruses that have not yet been identified.

Also, it is very typical for a network to have an anti-virus package running on the server as well as on the workstation.

Normally BarScan has no problem with (1) and (3) above, but the Real Time scanning (2) can cause BarScan to slow down substantially if the anti-virus packages are not configured properly. It is especially possible for BarScan to receive a double hit when anti-virus packages are running on both the server and the workstation. A typical BarScan configuration has BarScan running on the workstation but opening files on the server. If improperly configured, when BarScan attempts to use a data file on the server, both the server and the workstation will scan the file, each in turn, resulting is a double scan even before BarScan is able to use the data. This can obviously substantially reduce performance.

To prevent this your anti-virus scanning software needs some tuning. Check the anti-virus setup on both the server and the workstation.

The default BarScan server folder is:

drive:\BARSCANW

Of course, your actual installation location may differ.

Make sure that it is NOT scanning any files in the BarScan folder or any subfolders that have the following extensions:

.DBF .CDX .FPT .DBC .DCT .DCX .FRX .FRT

These are simply data files, but if the scanner keeps checking them every time they are opened, it will slow down the system considerably.

Optionally, you may see an additional improvement in speed if you remove the Bar|Scan application (barscanw.exe) from continuous scan as well, perhaps scanning it only when an update or change is made. However, do this only if you believe the risk is acceptable.

In a typical BarScan network installation, there are no data or program files installed on the workstation. It may be that performing these adjustments on the server may cause BarScan to have acceptable performance. If not, then configuring the anti-virus on the workstation typically involves turning off network drive scanning and turning off scans of files with the above extensions.

Finally, you may have noticed that this tip gives no specifics on how to accomplish the above exclusions with specific packages. BarScan cannot be responsible for tracking all of the various anti-virus software packages, both server and workstation, used to guard against viruses. The details vary considerably with each package on how to accomplish the above. Your IT department will be able to help you.

Finally, visit the Knowledge Base section of our website at www.barscan.com for more specific information on other potential problems.

APPENDIX-B

IMAGING

INTRODUCTION

The Imaging Feature is an optional module, but it can greatly enhance your system by giving you the ability to view images of your assets, catalogs, signatures as well as other images and print actual color or black and white images of your assets directly onto your reports.

Imaging is the process by which a previously saved image can be viewed on the Bar|Scan display screens. The images can be of many different formats, both color and black & white, and can be created from digital cameras, desktop scanners, still video, or other capture equipment.

The resolution of the input device and the file format will determine the quality and clarity of the image. In addition, scanning allows the placement of several images, including photographs, scanned fabric samples, and documents.

There is a set of videos on our website that can provide you with additional in operating Bar|Scan. These are titled Quickstart Overview Videos and can be found on this page: https://www.barscan.com/support-videos

Please consider viewing or downloading these as part of your learning experience.

VIEWING IMAGES

From the Asset, Catalog, Personnel, Work Order or Transaction tables in the Bar|Scan system, you may press the imaging button, located on the tool bar, to view an image as shown below.

This displays the image or multiple images of the asset in its own window. Press the X button to close the image.

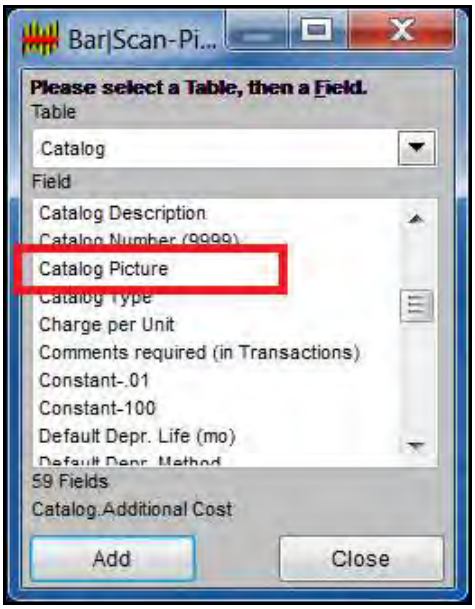
When you view an image, you will see a box similar to the following:

If the image box is blank, then you either do not have an image or it is in the wrong location, or, it is in a format that Bar|Scan cannot display (see file formats later in this section).

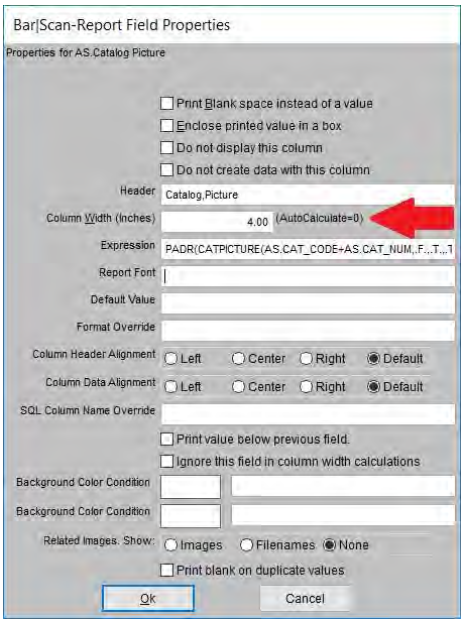
To display different images of the same item, click in the image name in the choice area as shown below

PRINTING IMAGES

Images can be printed on any report that can access the Catalog or Asset Table, by choosing Catalog or Asset Picture as one of the columns to be printed. The column name is Asset Picture or Catalog Picture as shown below.



The default shape for the image is the original image. You can change the dimensions of the image, by changing the width of the column by selecting the Catalog or Asset Picture and then clicking the Properties button on the Columns Tab. Because the image shape is the original image dimension, by making the image wider, it will automatically be resized to a larger image. A sample is shown to the right.



Bar|Scan may automatically convert your images to Windows® Bitmap format in order to print on some printers. This means that you may have two images of each Catalog or Asset in your images folder.

ORIGINAL IMAGE SIZE

Image size matters because there is a tradeoff between image quality and storage and printing ability. We recommend that images be no larger than 100,000 bytes in size (100 kb). Larger sizes bring very little additional quality to a viewed or printed image at normal print size.

Larger images also may fill up the printer's memory and may not print at all. There are tools available that can organizing and cleanup your images prior to importing into the Bar|Scan image folder. Go to http://faststone.org and try their tool. It is free but donations are welcome. Link provided with permission.

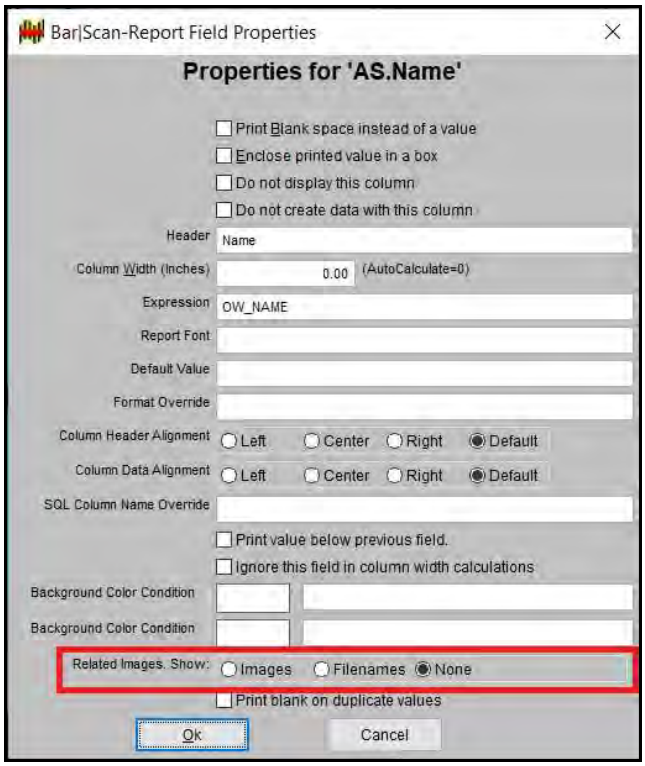
MULTIPLE IMAGES PER ITEM

You can store and display multiple images in a paging function, e.g. press page down to see the next image.

To see an image you need to name the image as the Catalog or Asset number, e.g. EP1045.jpg or T004949.bmp. To store multiple images, you need to add a file extension number such as T004949.1.bmp T004949.2.bmp or EP1045_1.jpg EP1045_2.jpg.

Note that the format of the extension is not critical as long as the filename begins with the Catalog or Asset Number. The number of additional images which can be displayed is unlimited. Only the first images will print using the Bar|Scan report generator.

You can also print images associated to other fields by selecting the Images option in the Properties button for each column that you wish to print as shown below.



FILE FORMATS

All images need to be saved as individual files with the same filename as the associated Catalog or Asset in Bar|Scan.

For example, if a catalog SE1000 is created, its corresponding image may be saved as se1000.jpg. If you are creating an Asset image, name the image with the Asset Number.

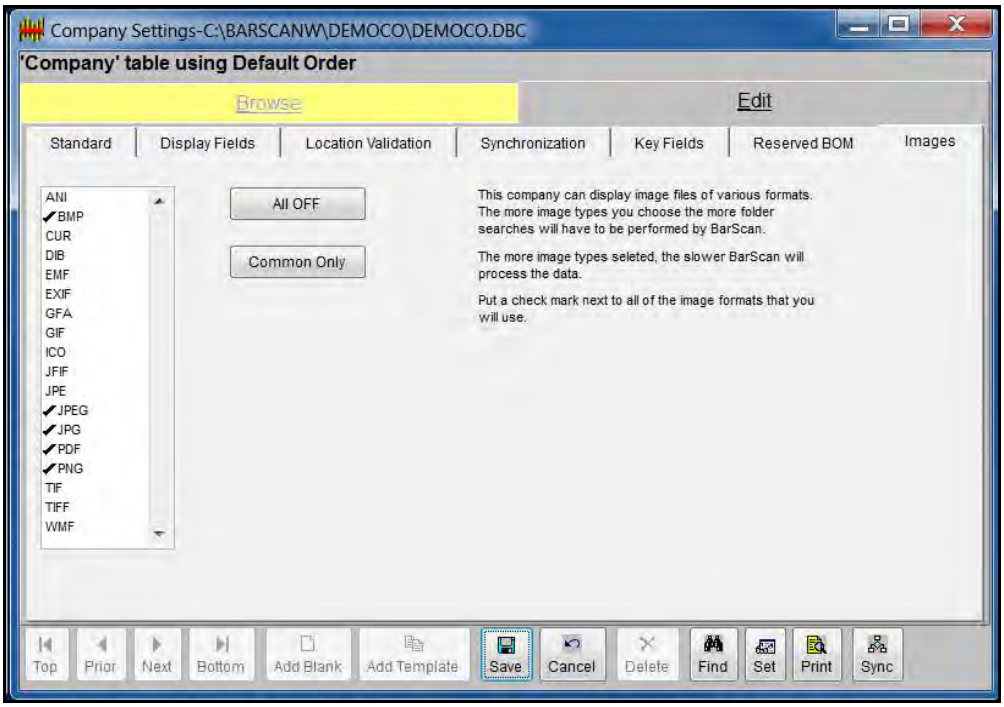
Images need to be saved in the same folder as the company or in a subfolder called images. The folder can be displayed, by selecting File ... ▸, Company ... ▸, Open from the Main Menu.

For example, this is a legitimate location for images:

K:\barscanw\company3\images

Generally, you will save your scanned image as a graphic file. There are many different graphic file formats, all with advantages and disadvantages. To get the best results, become familiar with the various graphics file formats that are compatible with your publishing software and printing equipment. The following is a list of file formats which are compatible with Bar|Scan's imaging capabilities:

Although Bar|Scan is compatible with all of these formats, the suggested format is the jpg format (file extension .jpg) since it is the most common format supported by applications.



You can control which images are viewable. For optimal speed, is best to chose only those formats that you are using to store your images.

IMPORTING IMAGES

Images can be added to your BarScan database in one of three ways.

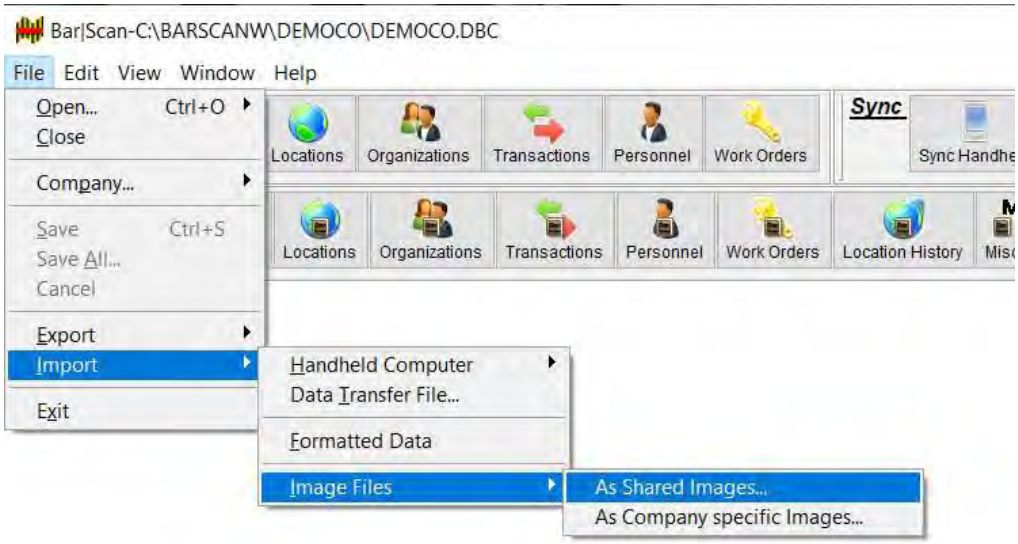
✓ Using the Import function in BarScan
✓ Manually using Windows File Explorer
✓ By using the Signature Capture feature in the Mobile Device

Using the Import feature in BarScan is recommended for adding a small number of images. For bulk addition of many images, using Windows File Explorer is more efficient as File Explorer allows you to copy and paste multiple images at a time.

BarScan does not resize or crop images during the import. So before adding images review the section titled 'Original Image Size' in this Appendix.

Using the Import function in BarScan

From the Main Menu select File-> Import-> Images Files as show below:



There are two options for importing. You can select either 'As Shared Images' or 'As Company specific Images'.

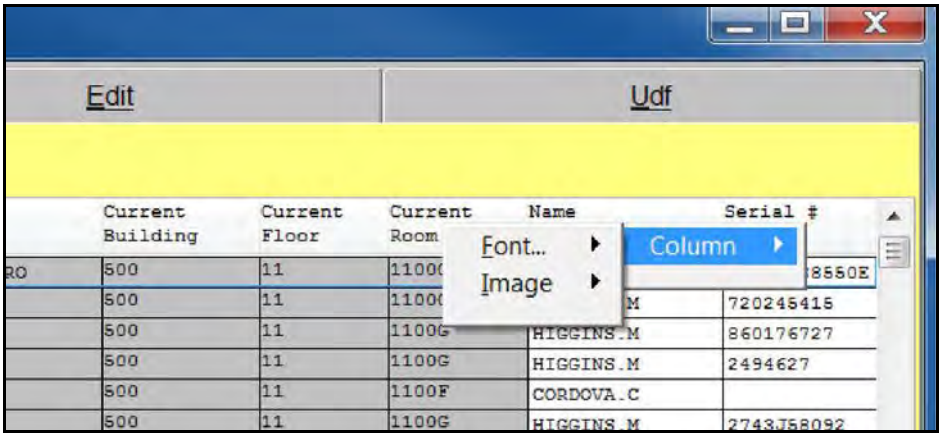
Unless you are sharing Tables, select 'As Company specific Images'.

As documented in the Chapter 17 - Multiple Company Database, BarScan Tables can be shared between Companies. For example, if you are sharing one Catalog Table between two Companies, you would select 'As Shared Images'.

DISPLAYING IMAGES

Bar|Scan can display images other than Catalogs and Asset. One of the features in Bar|Scan is its ability to display an image in any of the columns of the browse screen. The first column is always the index column used for searching and ordering and cannot display a corresponding image. This is true for all Screens wherever a browse grid appears. It is also true for some lookup lists, that is, those lookup lists that have secondary columns (this varies with the field itself, not all fields can show the auxiliary columns).

The column must allow imaging. You can tell if imaging is enabled for a column by right clicking on the column header text. If you are presented with a popup menu that includes imaging being turned on or off, then it is enabled (e.g., menu item 'column/image/on'). See the example below.



When imaging for a column is turned on (pop up menu item 'column/image/on'),

a small camera icon appears alongside the column title. If imaging in ON and there are no images corresponding to the data in the column then you will only see a blank, as if there is no data. The data is not gone, simply set it back to Images/OFF and the data will reappear. Image/ON shows available images, Image/OFF shows the data.

The image file displayed corresponds to the exact text of the data in the column.

Unlike the full screen imaging for Assets and Catalogs, only one image can be displayed, the image with the exact text of the data being displayed in the column. Pdf images cannot be displayed, but if there is an existing PDF image file you will see the graphical text 'Pdf' in the column. If there is both a graphics file and pdf file with the same name, then the graphics file will be displayed.

Since the data in the data field is what is used to select what image file to display, Bar|Scan cannot tell the difference different fields with the same value. For example, if a room tag and organization code both have code 00500, the same image will be displayed for both.

This feature allows pictures to be taken and displayed for almost any data within Bar|Scan. For example:

✓Display a photo of a person in the Asset 'Name' column.

✓Take a photo of a location and display it in the 'Room Tag' column.

✓Display an image of the actual Mobile Device unit in the Mobile Device Advanced Settings browse screen using the Mobile Device ID Field.

✓Create images of various condition codes to help guide users on what 'Good' or 'Fair' actually mean.

✓Scan logos for various manufacturers and display them in the 'Manufacturer' field.

✓Take a picture of an asset and display it in the Asset # column.

✓Assign an image to a Catalog.

✓Signature Capture in the Mobile Device.

One area that may be confusing are those fields that have multiple parts, such as the Catalog field. The Catalog field consists of the Code (XX) and the Number (9999). Displaying either of these individually will not display its catalog image. To display the catalog image one must select the full catalog field to display (XX9999).

Signature Capture

Signature Capture is discussed in detail in *Chapter 6 - Assets* and *Chapter 11 - Mobile Device.*

Nomenclature of Image File

The image file is stored in Joint Photographic Experts Group (jpeg or jpg) standard format. Using Bar|Scan, it can be viewed, exported or printed. The image is always associated with the field used to capture it by its naming nomenclature. The nomenclature is defined at the end of this section. Here is an example:

sig-@as-fa0000226800@per-cordovac@d-2014_10_13@t-122028.jpeg

below are the Key field types for images. They are:

AS= Asset Number
CA= Catalog
D= Date
PER= Personnel
T= Time
WM= Work Order Number
WD= Work Order Line Number

Each of these types corresponds to one or more fields. These can be thought of as the 'kind of field' associated with the signature. For example, although all names are validated against the Personnel Table, there are many different fields in Bar|Scan that contain names. An example would be the Asset Current and Prior Name.

Likewise for the date and time fields. These correspond to the Inventory Date and Time or the Move Date and time, depending upon which table is being accessed.

All permanent signature image files start with ‘sig’ while temporary files start with ‘tempsig’.

If the user selects a field for the signature that does not correspond with one of the key fields, then the name of the database field in the table. For example, the serial number database field name is SY_NO. The format will then be: @RawFieldName-FldValue.

For example, if a Transaction UDF is created named ‘UD_NAME’, the user prompts for it in the Mobile Device, fills it in with ‘SMITHJ’ and also assigns a signature, then the name fragment would be @UD_NAME-SMITHJ. Note that the name is based on the response, not on what is entered into the signature capture field.

To maintain compatibility with prior versions of the Bar|Scan program, existing image filenames that start with an asset # or catalog number without the ‘@’ are also recognized.

If an image key field is changed, then the image file is renamed with the new key field value added to the filename. The old value is not discarded. For example, if a person is changed from SMITHJ to JONESK then the image filename will change from:

@PER-SMITHJ.JPG

To

@PER-SMITHJ@PER-JONESK.JPG

This renaming applies only for:

AS= Asset Number
CA= Catalog
PER= Personnel
WM= Work Order Number

All field name values are processed so that all illegal filename characters are either removed or translated. For example, if the name is 'BLACK,QR' with the first and middle initial following the last name, then the filename fragment would be 'PER-BLACKQR' since commas cannot be used in Windows filenames.

A note on Mobile Device files: All of the inventory information, including the signature data, is in the Bstransa.xml which is transferred from the Mobile Device to the desktop.

Finally, visit the Knowledge Base section of our website at www.barscan.com for more specific information on images.

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