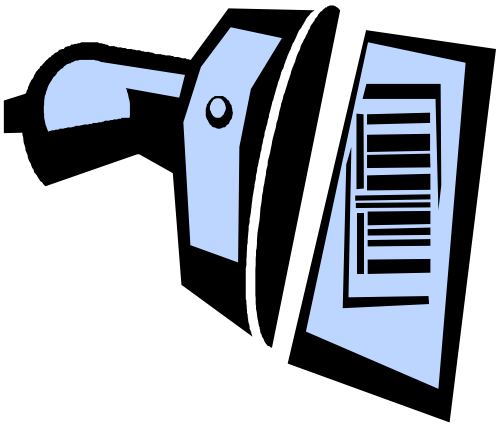
Asset Management

Physical Inventory

Scanner Procedures



Agenda

Steps to Perform a Physical Inventory

1. Define Extract and Scan Scope
2. Define Physical Inventory Occurrence
3. Create Extract File
4. Data Collection (Scanner Process)
5. Inventory Processing

PI Scanner Software Upgrade

Define Extract and Scan Scope

Extract File: “Extract” from the Core-CT AM tables what you want to be available on your scanner as you perform the Physical Inventory. The extract includes all possible locations for the assets to be inventoried.

Scope File: The scope defines the actual physical inventory, that is, where the inventory actually occurs.

Example: You plan to take inventory on the second floor of a three floor building. Because the assets may have been redistributed since the last inventory, the extract file might include assets on all three floors. However, the scope file would include only assets on the second floor.

Agenda

Physical Inventory Scanner

1. Scanner Hardware
2. Active Sync PC Communication
3. Data Collection (Scanner Process)
4. File Maintenance

Introduce Scanner

Scanner Hardware

<u>Intermec CK31Handheld Computer</u>

The Scan Button

The Power I/O key

• If the scanner is "locked", press the yellow Power button for 3 seconds to perform a "warm boot".

Introduce Scanner

Scanner Hardware

Intermec Docking Station

o Flashing Green – Battery Charging

o Steady Green – Battery Fully Charged

o Flashing Red – Battery Not Charging

- **Fully charged battery life is 8 or more hours. Units should be kept charged to maintain software settings.**

Setup/Navigate

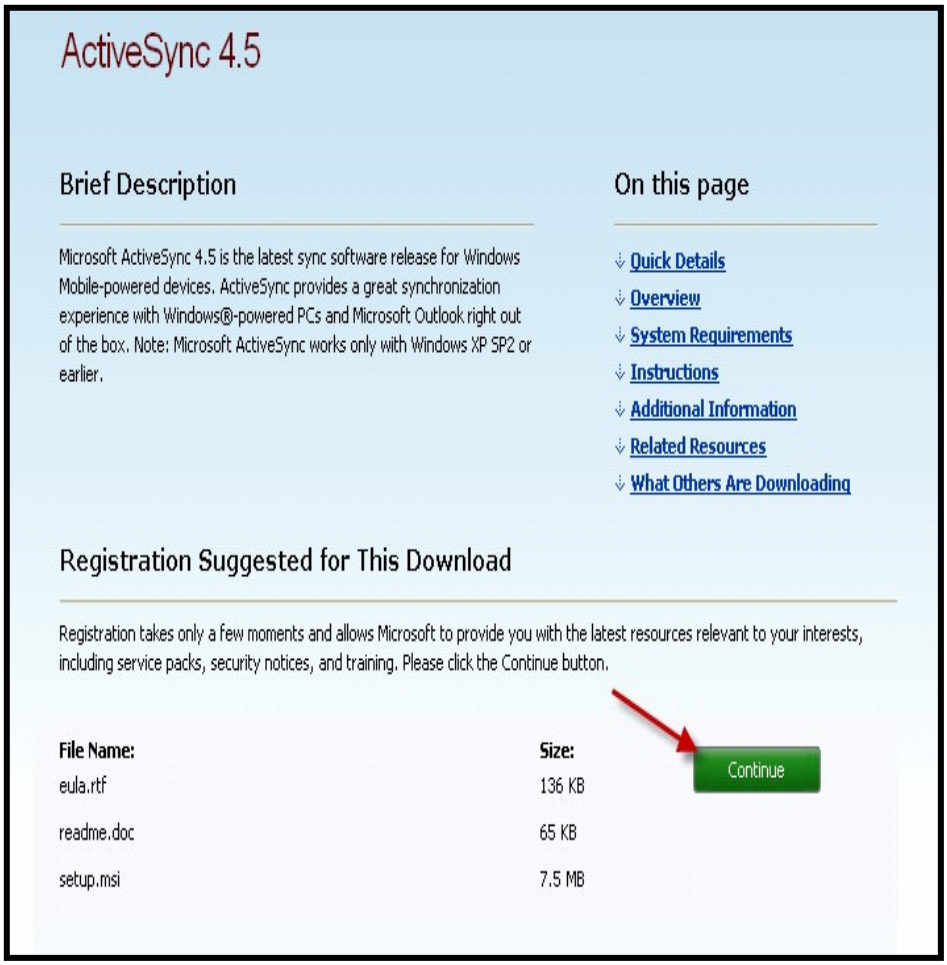
Agenda

2. Active Sync PC Communication

• The operating system Windows 7 has built-in communication software so the downloading and use of Active Sync is not necessary.

Setup/Navigate

ActiveSync Communications

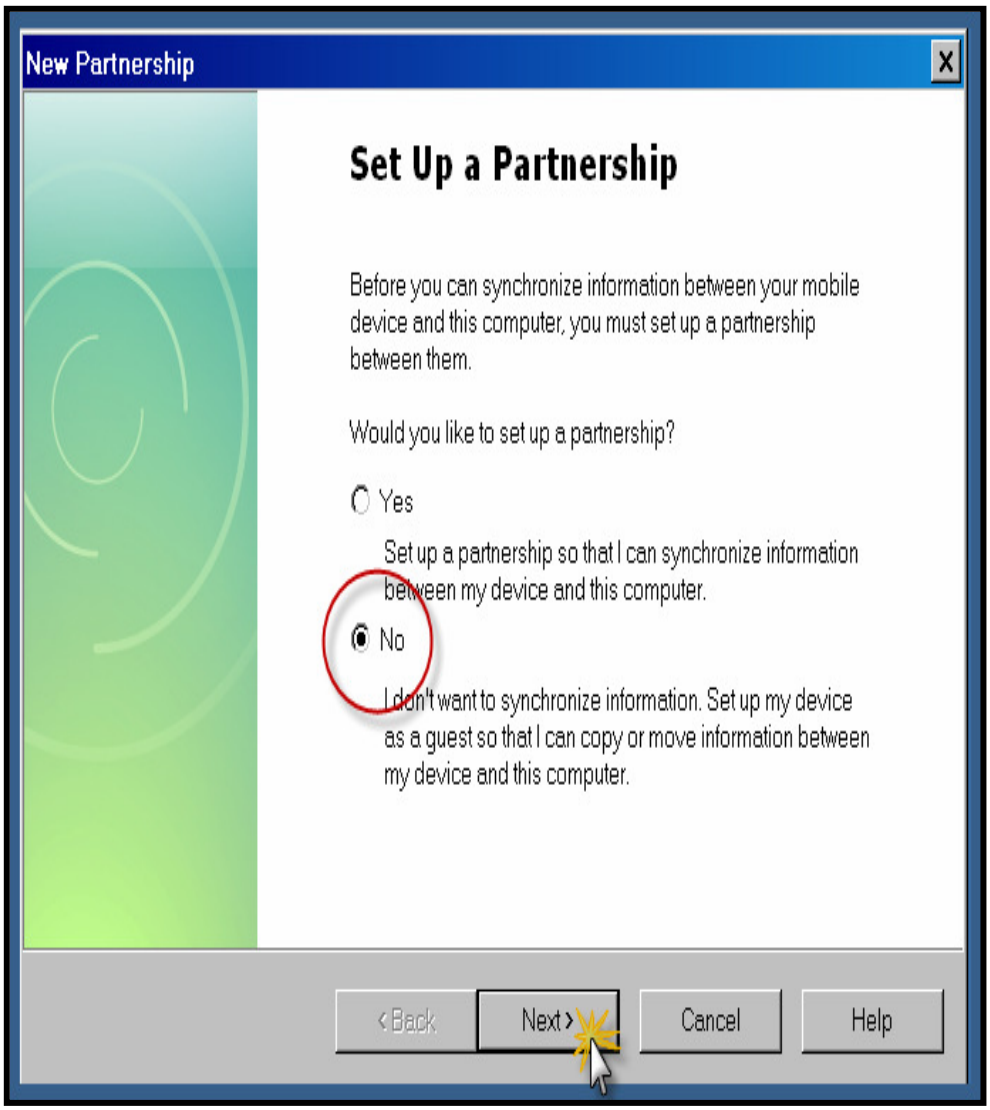


http://www.core-ct.state.ct.us/financials/aibsp/activesync_install.htm

- **Microsoft ActiveSync software for windows is required to transfer files to and from the Intermec scanner.**
- **Follow the Core-CT website on-screen link to download the software (free of charge). This is a one time setup.**

Setup/Navigate

ActiveSync Communications



- **Connect the charger base to the PC with a USB cable.**

- **With the scanner in the base, turn on the scanner. The following screen will appear on the PC.**

- **Select 'No' at the Set Up Partnership screen.**

Setup/Navigate

ActiveSync Communications

• **Once the connection has been established, a green icon will appear in the lower right hand corner of your desktop screen.**

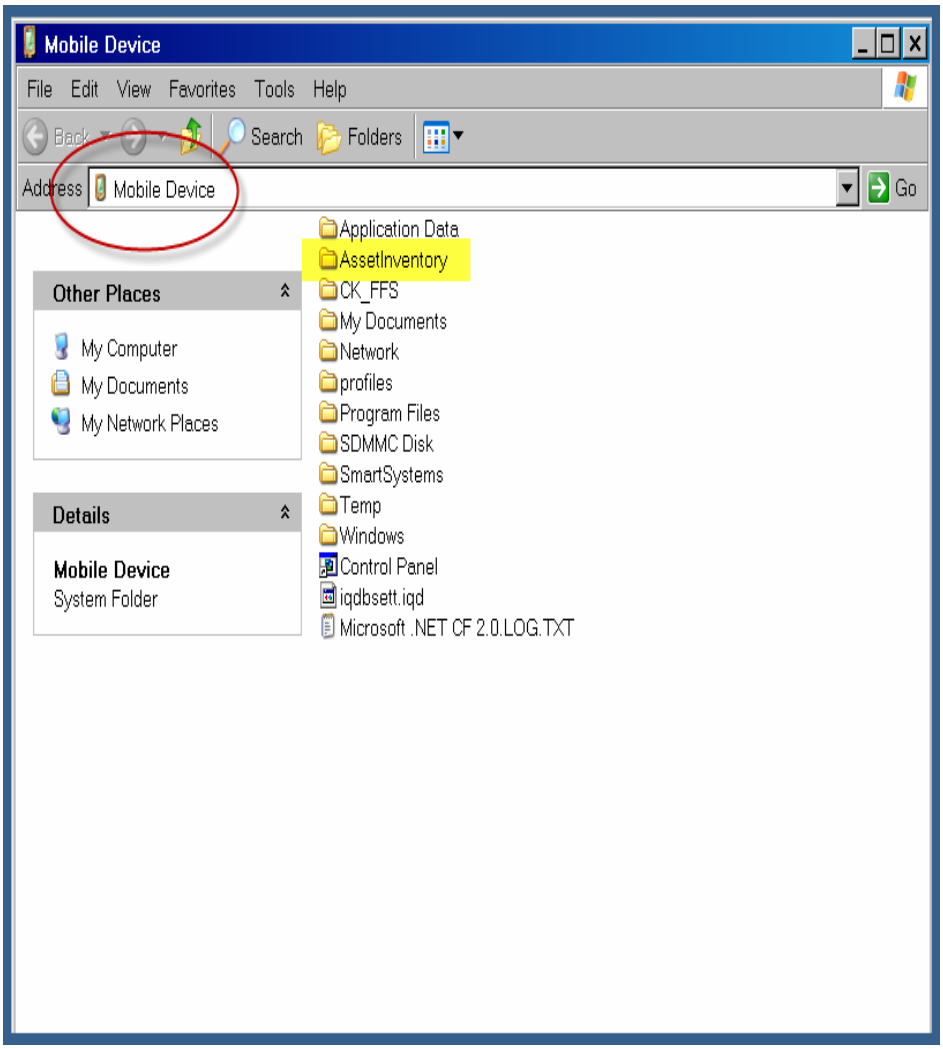
Setup/Navigate

ActiveSync Communications

• **The Explore link will display on the desktop. This will open the folders on the scanner.**

Setup/Navigate

ActiveSync Communications

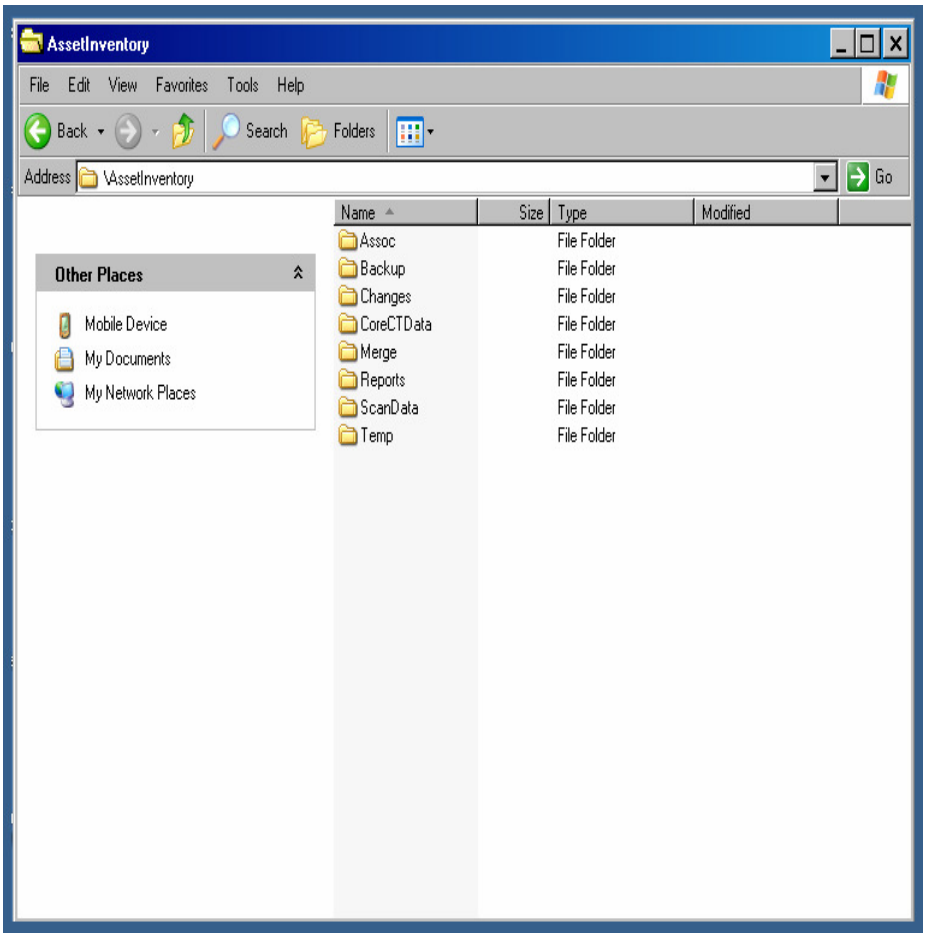


- **The Mobile Device is the scanner. All of the scanner file folders are displayed. Open up the AssetInventory folder.**

- **Do not delete or rename the folders.**

Setup/Navigate

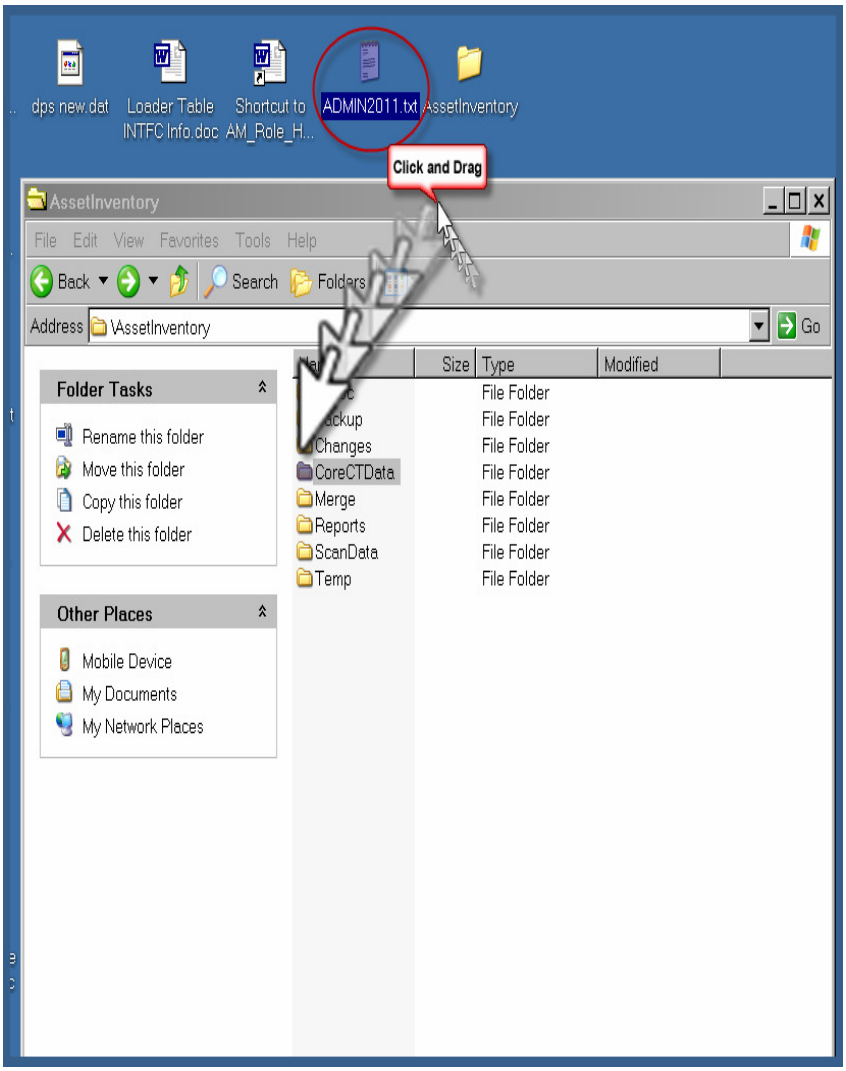
ActiveSync Communications



- **There are 8 default subfolders located in the AssetInventory folder.**
- **The Extract file (always with a .txt extension) should always be copied into the CoreCTData folder.**

Setup/Navigate

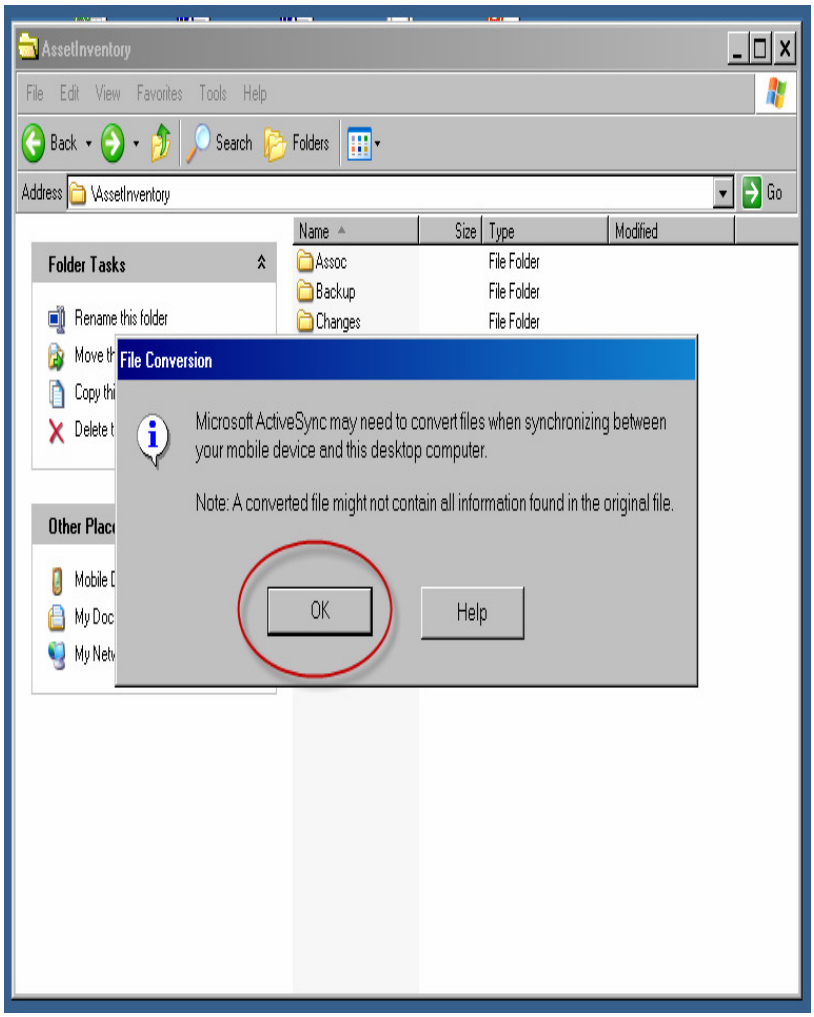
ActiveSync Communications



• **The easiest way to copy the file from the computer is to simply drag the file from the desktop into the folder (CoreCTData).**

Setup/Navigate

ActiveSync Communications



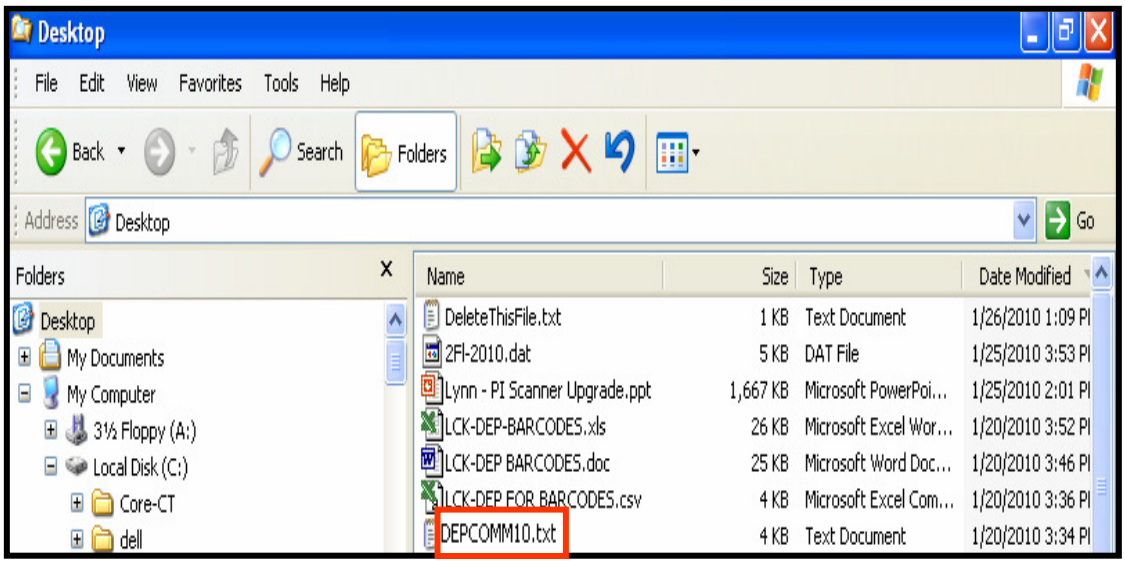
- **Once the file is copied into the appropriate folder, a file conversion message may appear.**

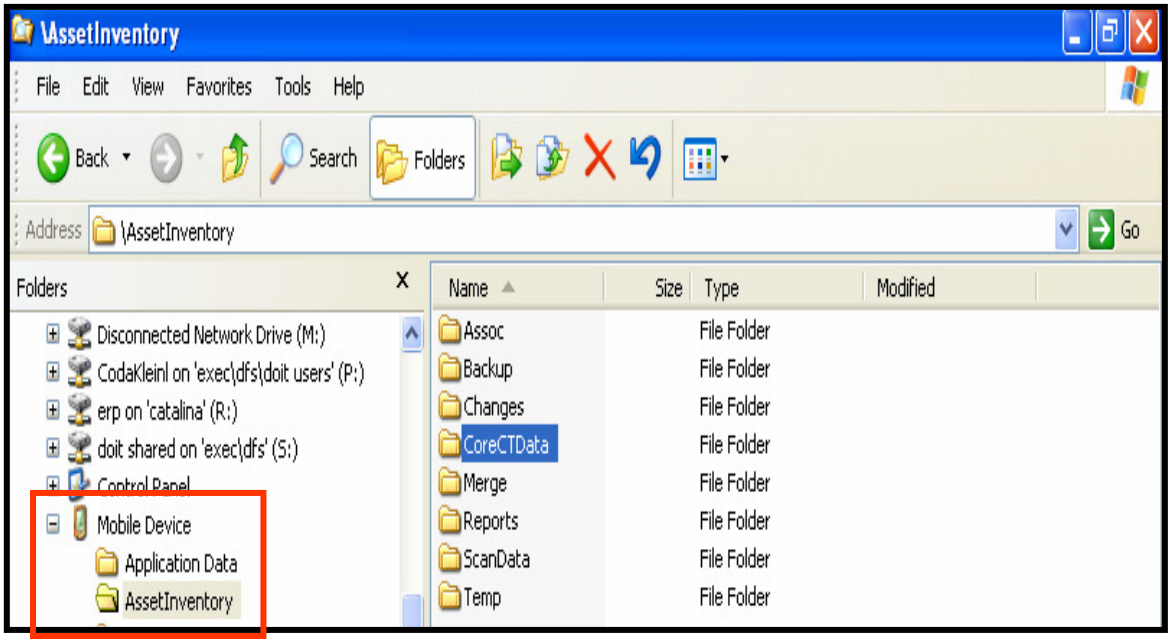
- **Select the Ok button to continue. The Core-CT extract file has now been successfully transferred to the portable scanner.**

PI Scanner

Data Collection (Scanner Process)

SCANNER

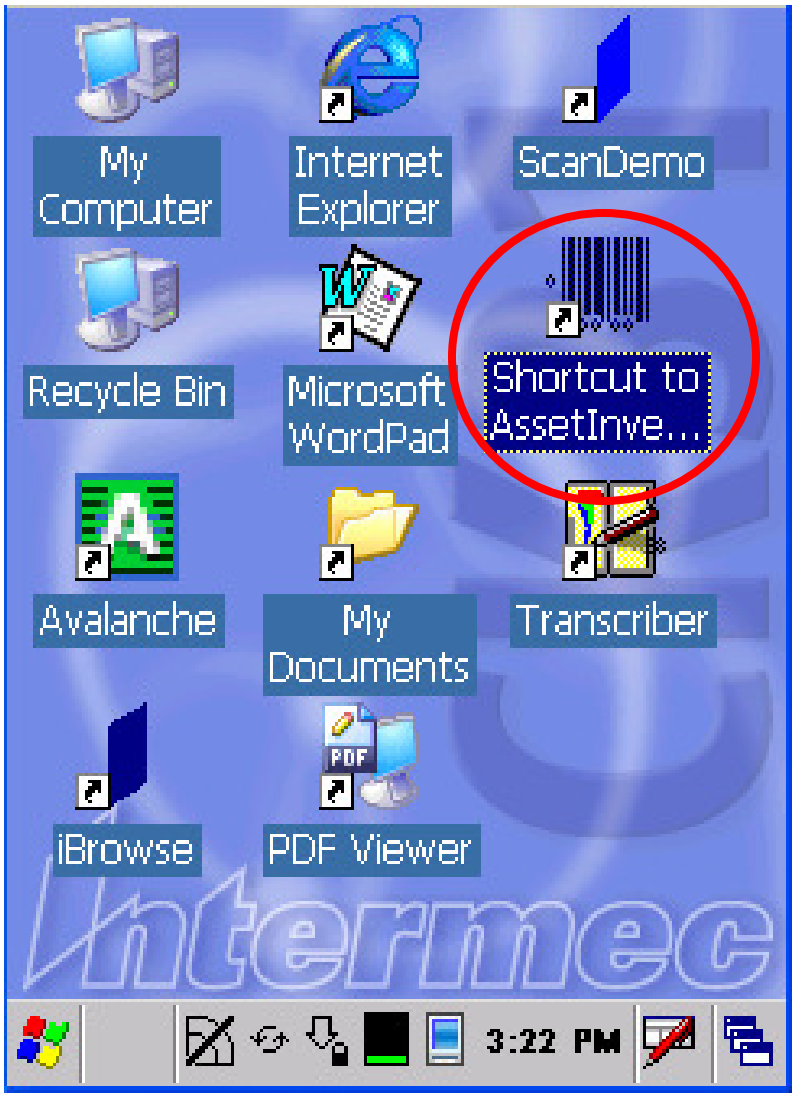




- **Once the extract file is saved it is ready to copy onto the scanner. The extract will have a .txt extension.**
- **Copy it from the PC to the Mobile Device AssetInventory/CoreCTData folder.**
- **Please note that you need to be running a copy of Microsoft's Active Sync software on PC in order to communicate with the scanner. There is a link to this software on the Core-CT Website.**

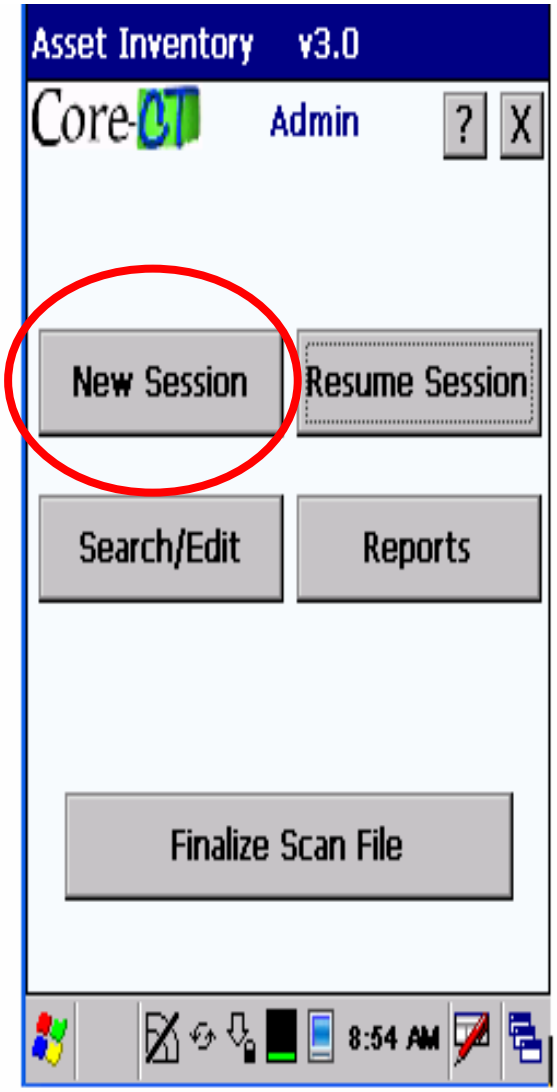
SCANNER

Scanner Welcome Screen



- **Double click on 'Shortcut to AssetInventory'**

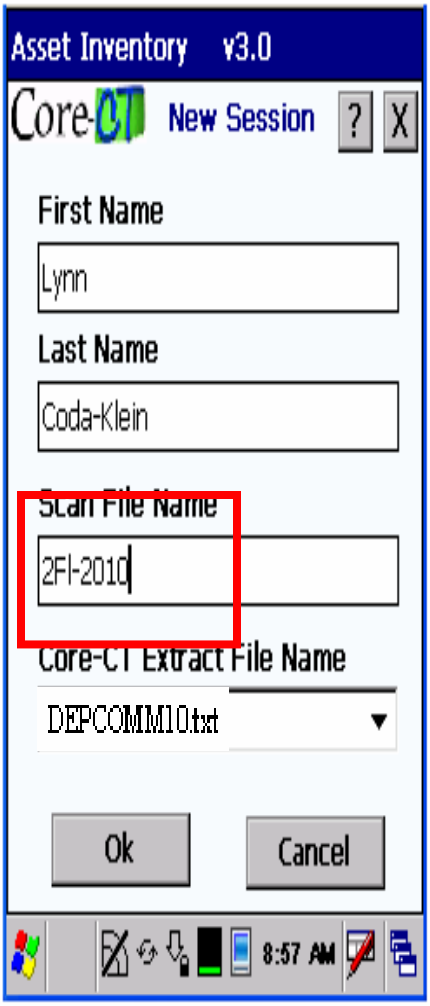
SCANNER



- The 'Admin' screen is where you navigate to the various functions on the scanner.
- To start a new inventory occurrence, press 'New Session'

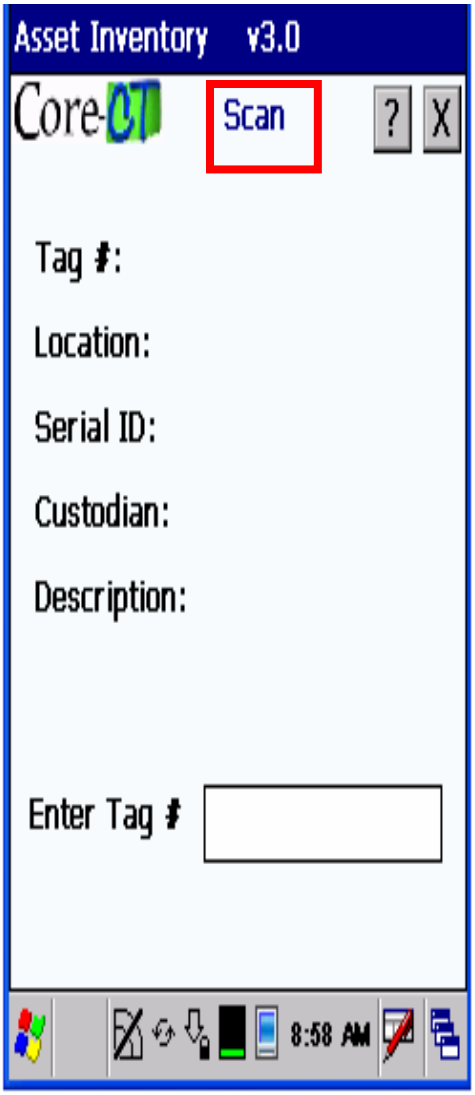
SCANNER

No file extension



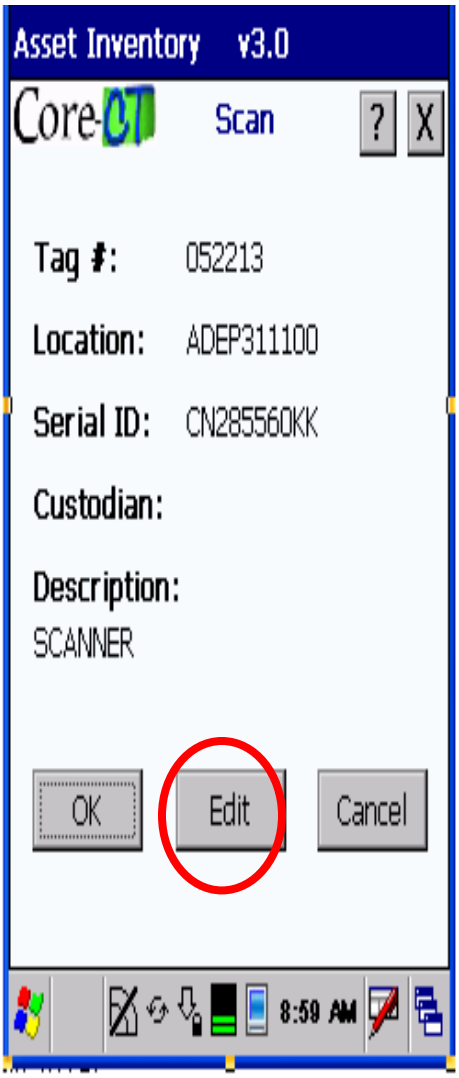
- **On the 'New Session' screen, enter your first and last name.**
- **Name the scan file to a meaningful name that is 12 characters.**
- **Select the Extract file for the session copied onto the scanner from Core-CT.**
- **Press 'OK' on the screen on the screen or the 'Enter' button on the scanner to start scanning.**

SCANNER



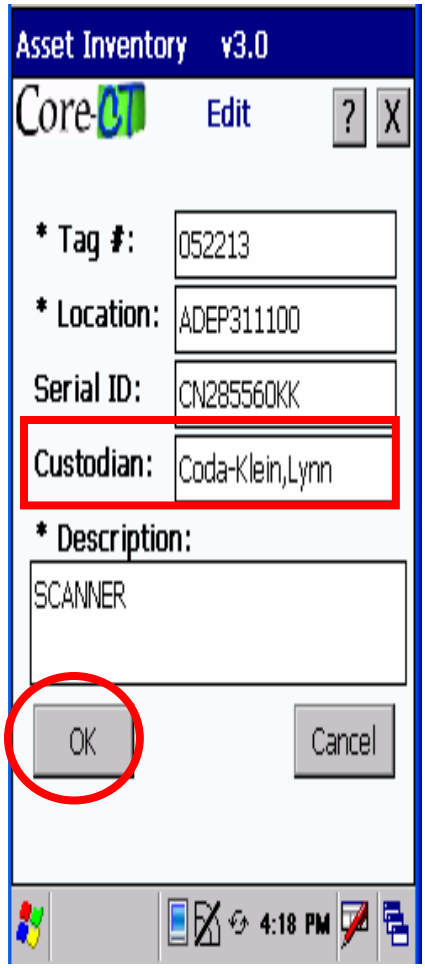
- **At the 'Scan' screen, start scanning assets.**

SCANNER



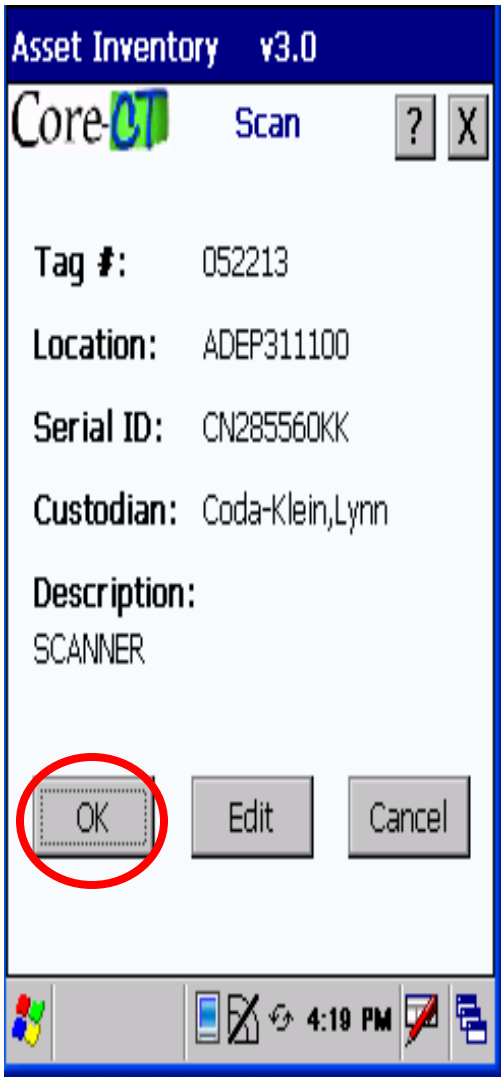
- **Once an asset is scanned, information from the extract file will be displayed on the screen.**
- **If the information is correct, press 'OK' on the screen on the screen or the 'Enter' button on the scanner.**
- **To update the data, press 'Edit'. Cancel will not save the record to the scan file.**

SCANNER



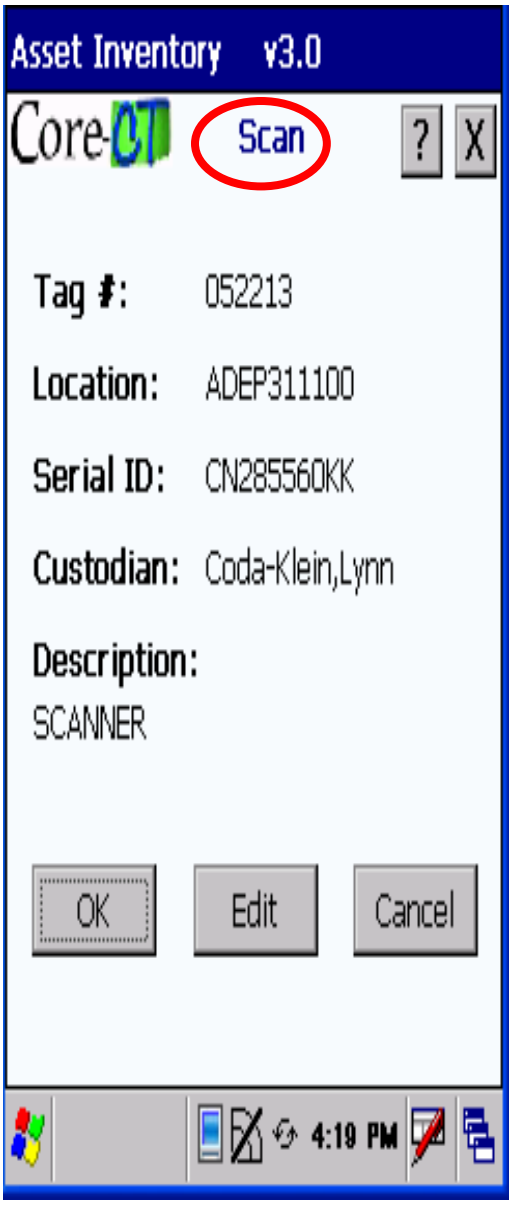
- **Enter additional information as necessary.**
- **Fields marked with an asterisk are required fields.**

SCANNER



• **At the 'Scan' screen, verify the changes, then press 'OK' on the screen on the screen or the 'Enter' button on the scanner to accept the changes.**

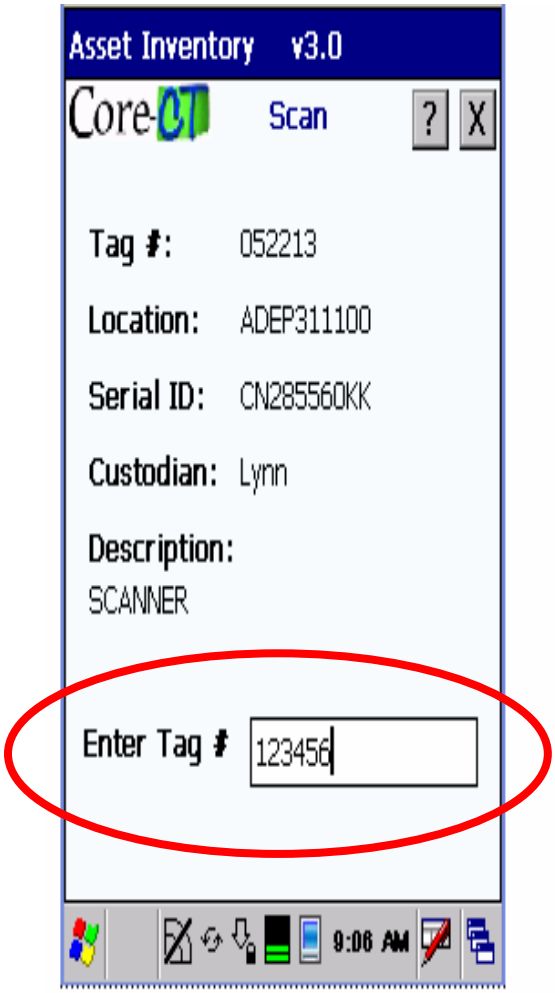
SCANNER



- **Now the next asset can be scanned.**

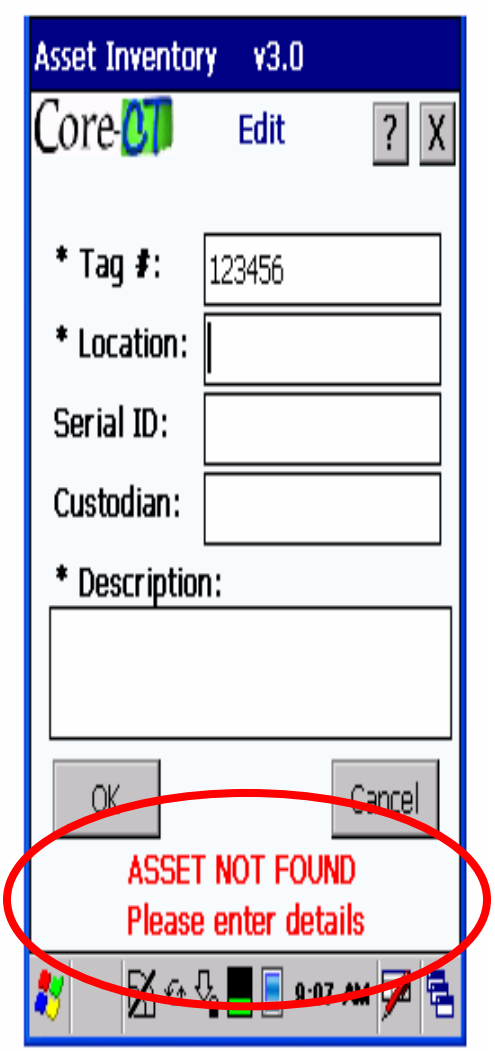
SCANNER

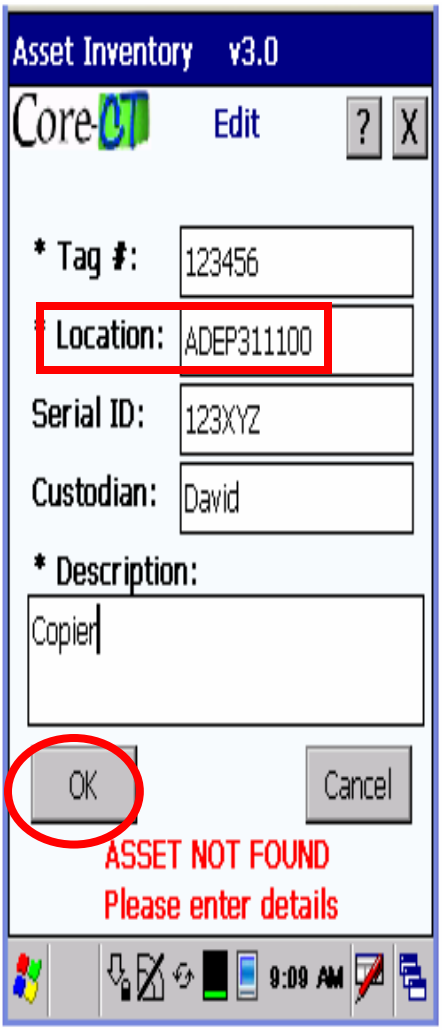
Manually Enter Assets



- **Assets can be entered manually on the 'Scan' screen.**
- **Type in the Tag number and press the 'Enter' button on the scanner.**
- **The 'Edit' screen will be displayed with a message that the asset is not found in the extract file.**

SCANNER

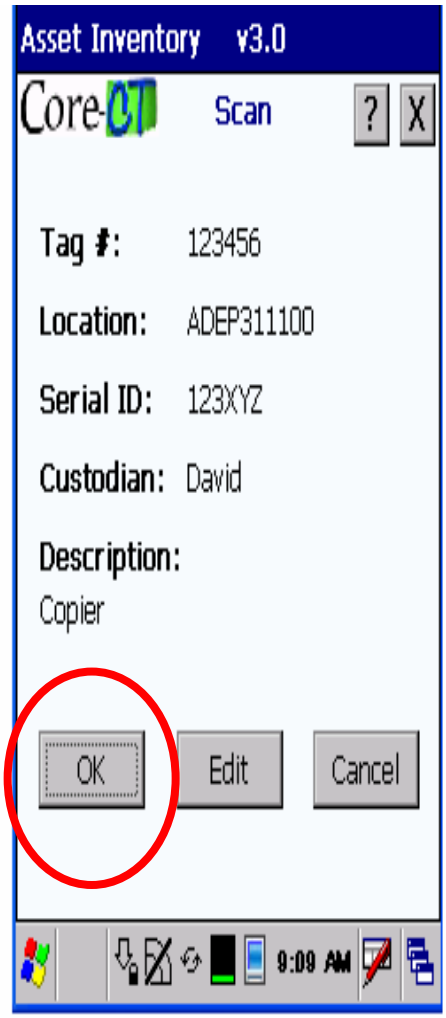


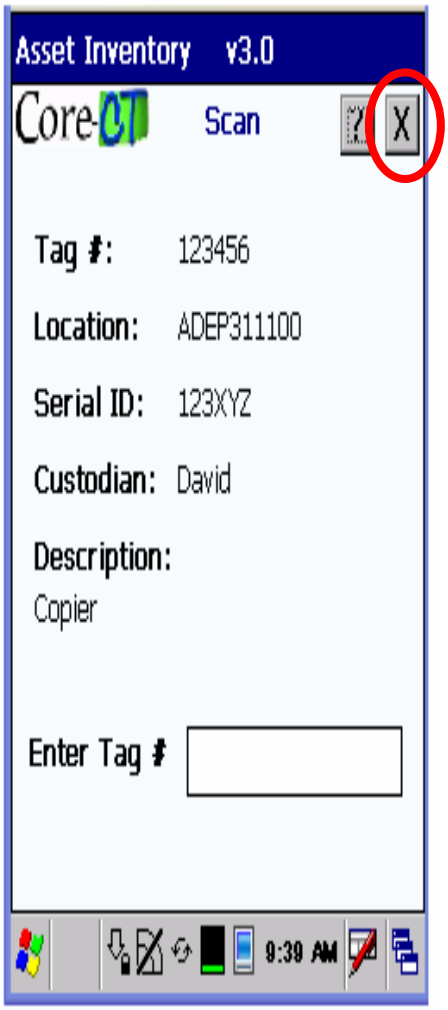


***** add as much of the data as possible*****

- **Fields with an asterisk are required, although it is best to add as much of the data as possible.**
- **Press 'OK' on the screen on the screen or the 'Enter' button on the scanner to accept the record.**

SCANNER





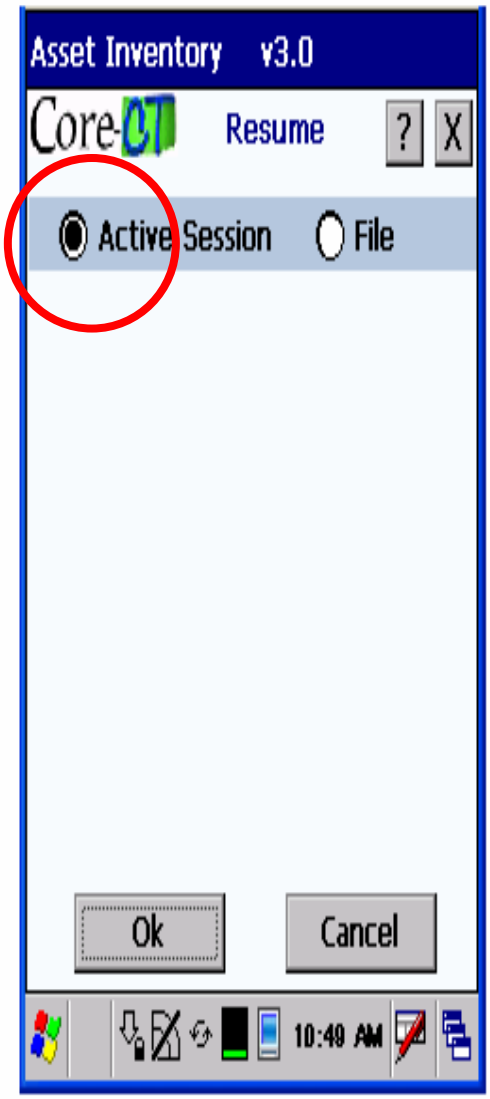
• **Review the data on the 'Scan' screen and press 'OK' on the screen or the 'Enter' button on the scanner to accept the record.**

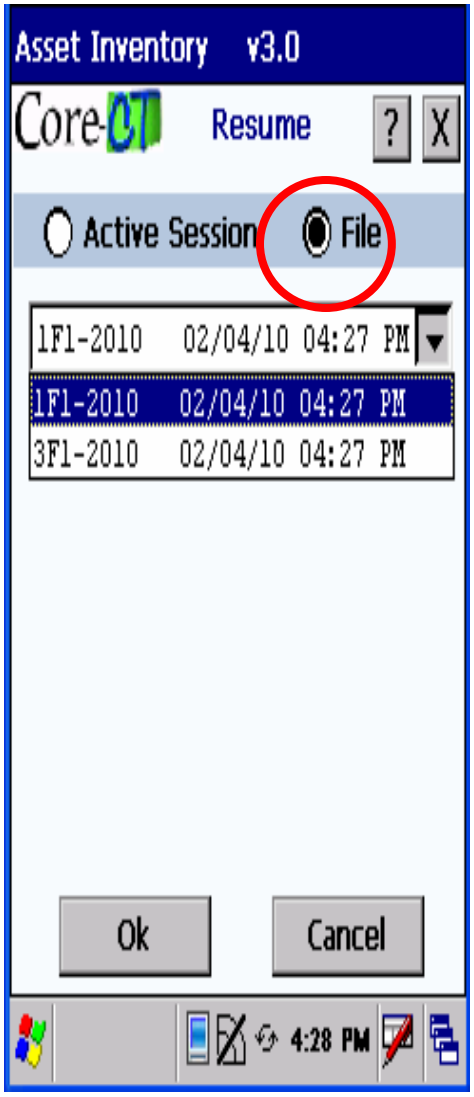
• **To exit the scanning process, press the 'X' on the top right of the screen.**

SCANNER

• **To continue a session, select 'Resume Session' on the 'Admin' screen.**

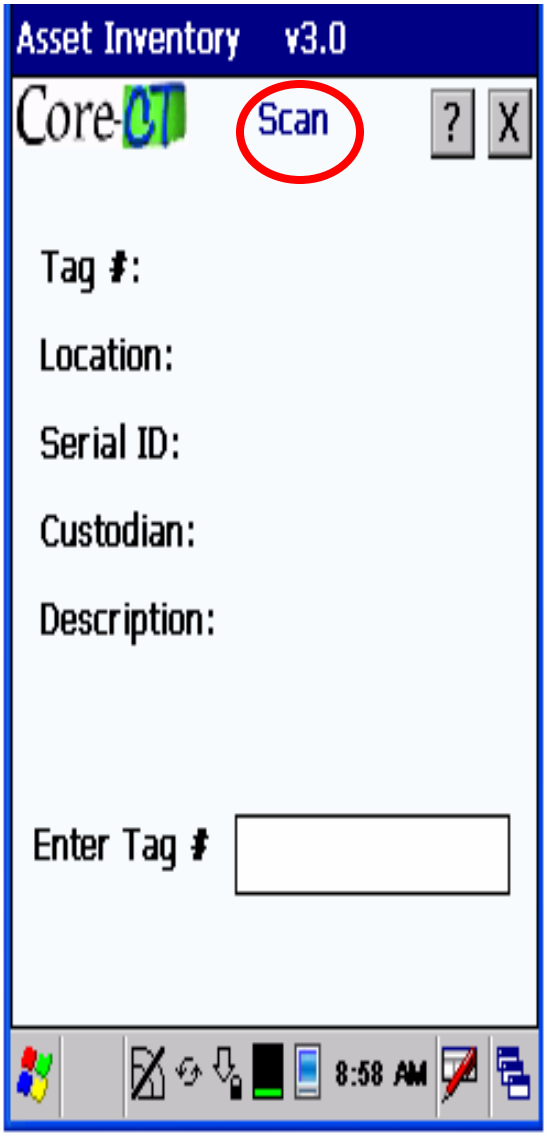
SCANNER





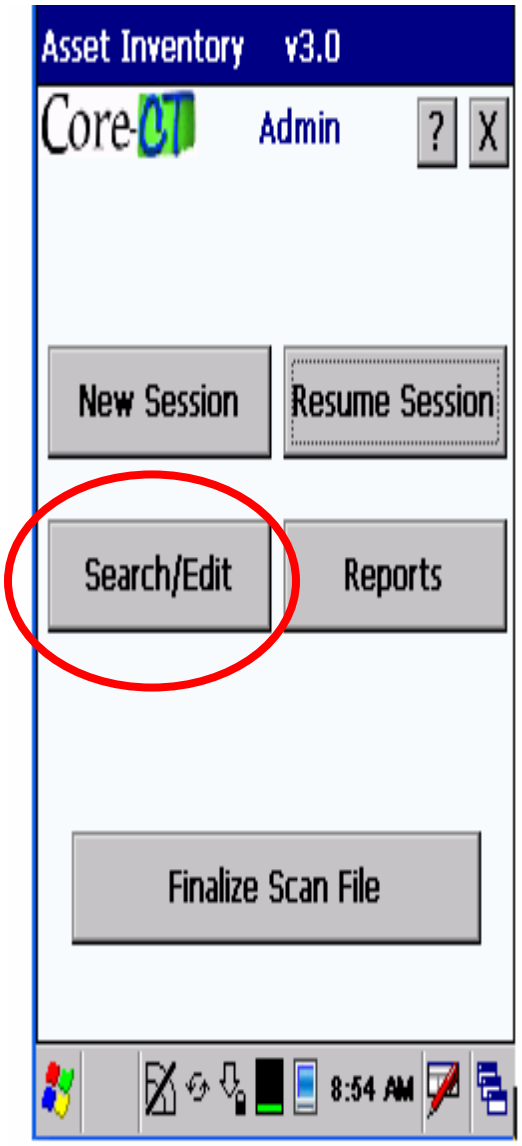
• On the 'Resume' screen, choose either the active session or a previous session for which files exist on the Scanner. The 'Scan' screen will display and scanning can continue.

SCANNER



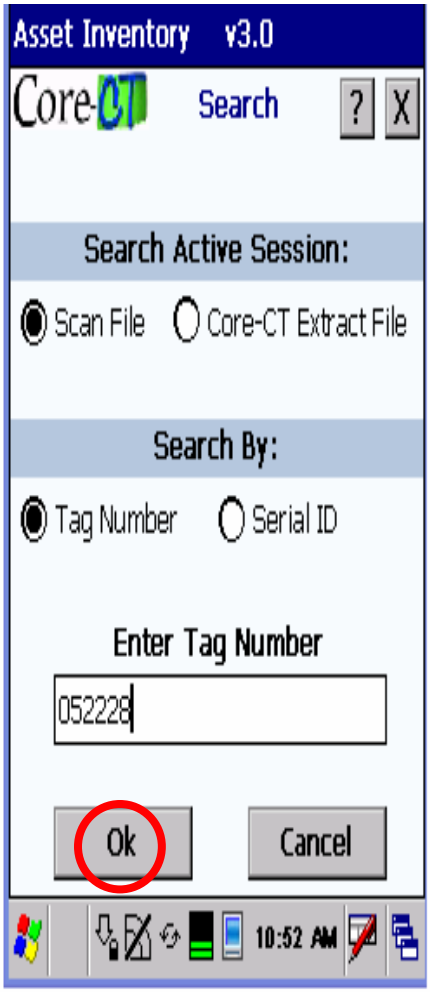
- **The 'Scan' screen will display and scanning can resume.**

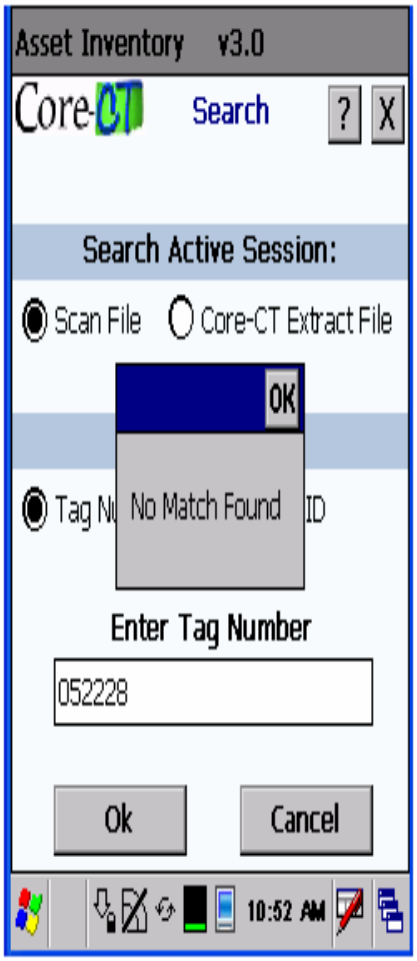
SCANNER



• **To search for an asset, either on the Scan file or the Extract file, select 'Search/Edit' on the 'Admin' screen.**

SCANNER

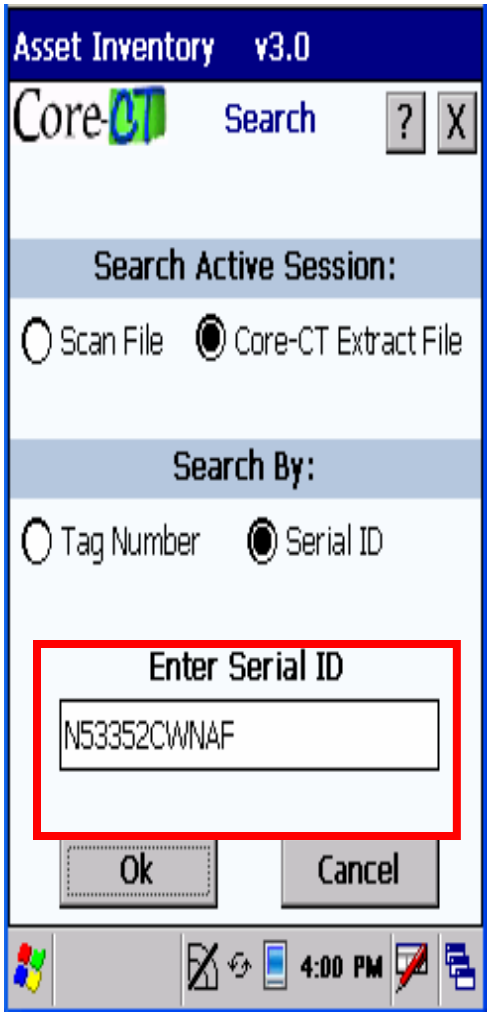


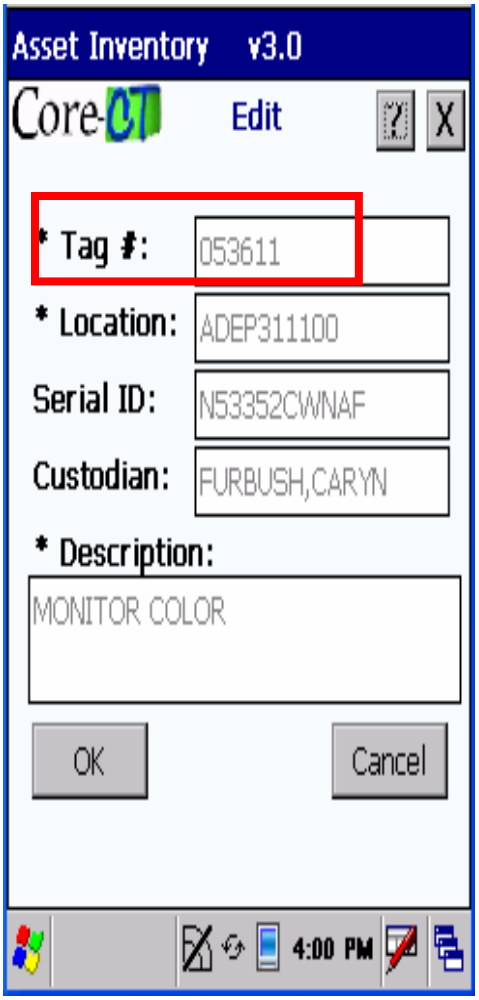


- **Using the radio buttons, select which file to search on and which field to search by.**
- **Enter the value to be searched.**
- **If the record is not found, a message box will display.**

SCANNER

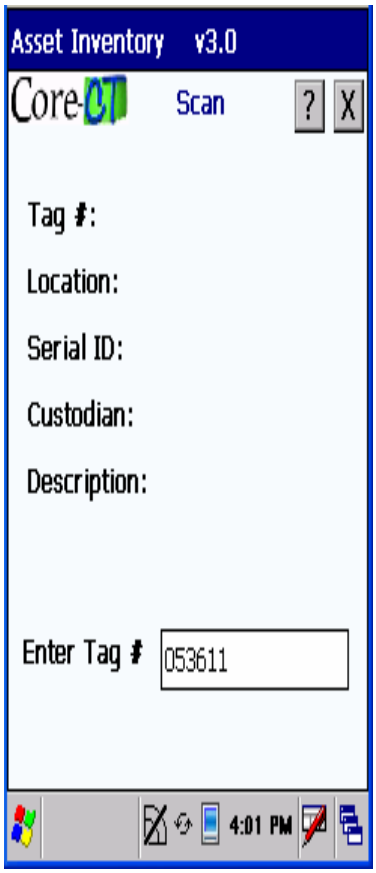
Missing or Damaged Tag

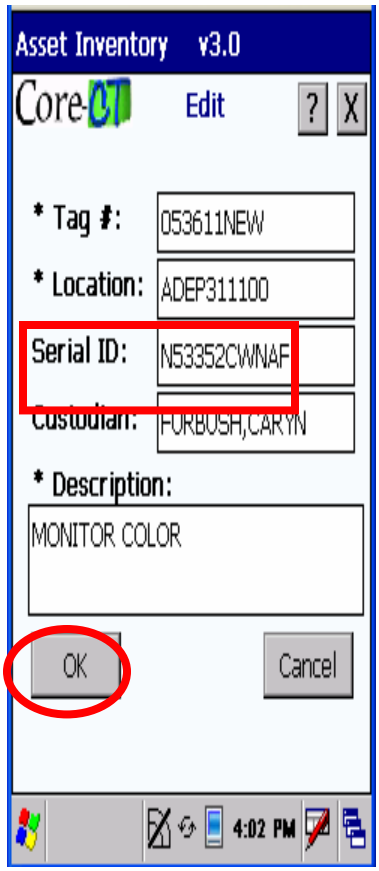




- **When searching the Extract file, the data is display only. It cannot be modified.**
- **This search is by Tag Number.**

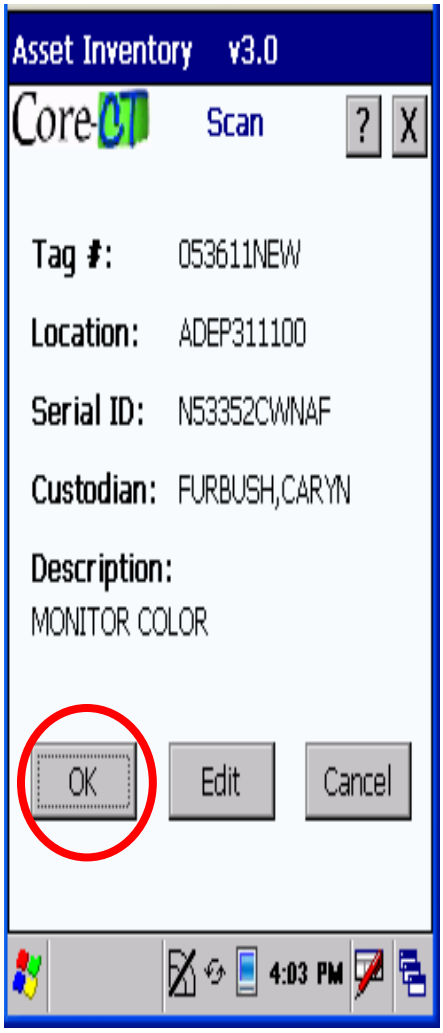
SCANNER





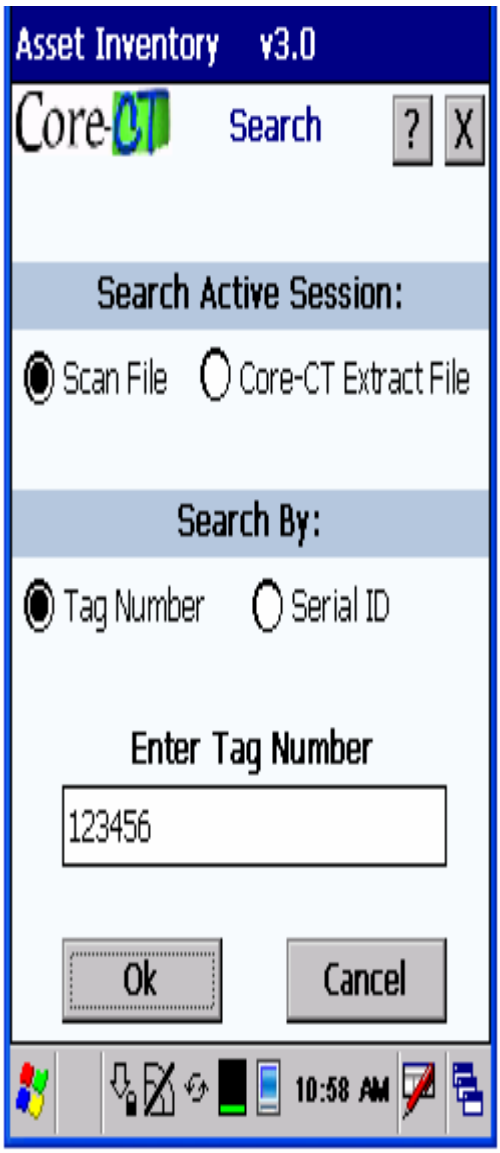
- **The file can also be searched by Serial ID, therefore it is important to update Serial IDs on each asset when scanning.**
- **The information will be useful during future inventories when the tag is missing on an asset.**

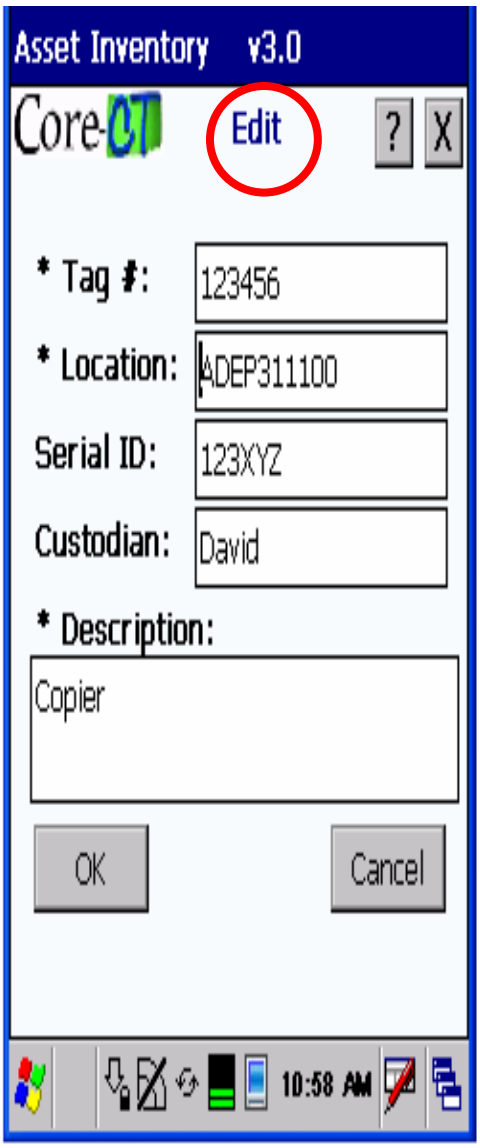
SCANNER



- **Once the tag number is updated, press OK to save the changes.**

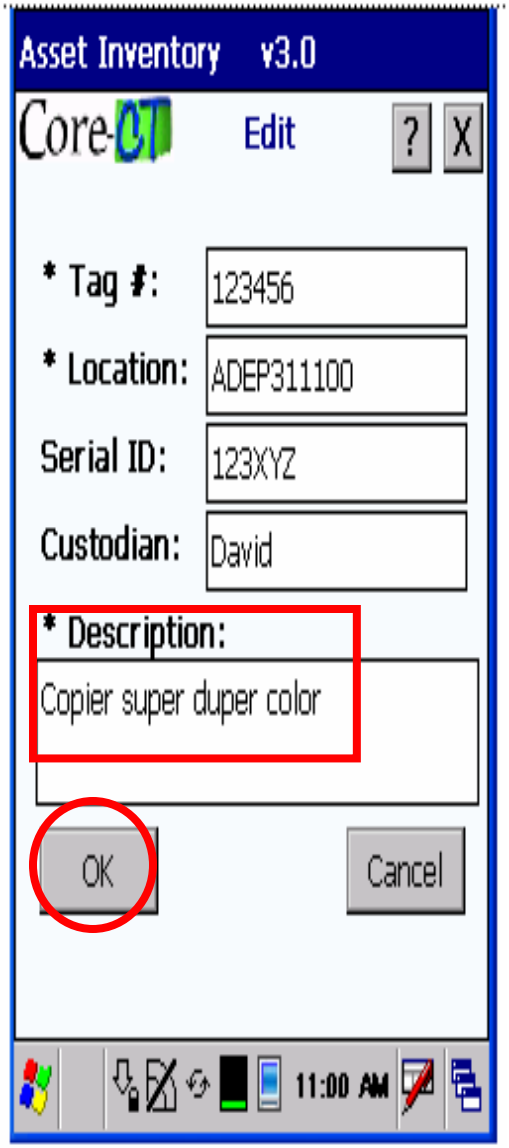
SCANNER

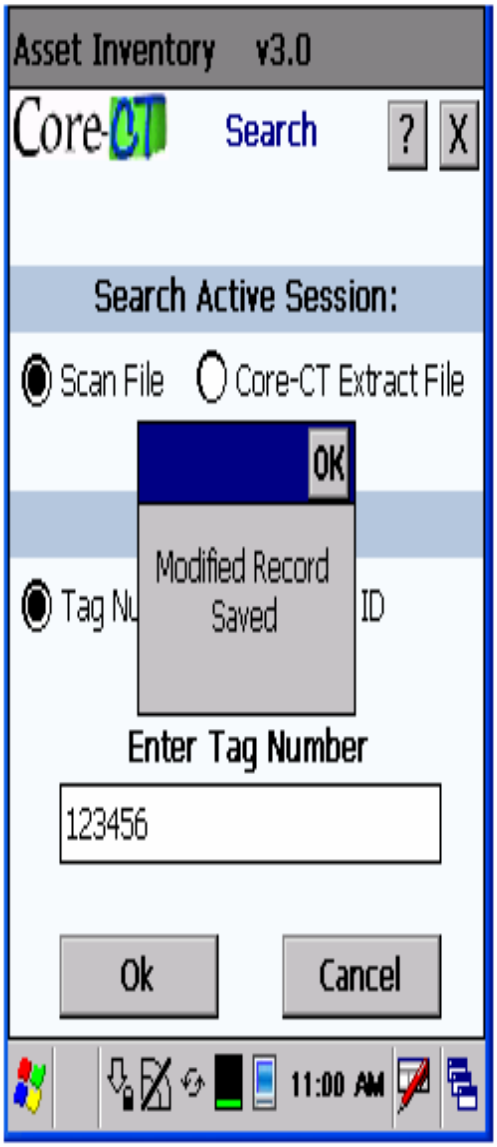




• **When searching the Scan file, the asset will be displayed in 'Edit' mode, allowing you to update the data.**

SCANNER

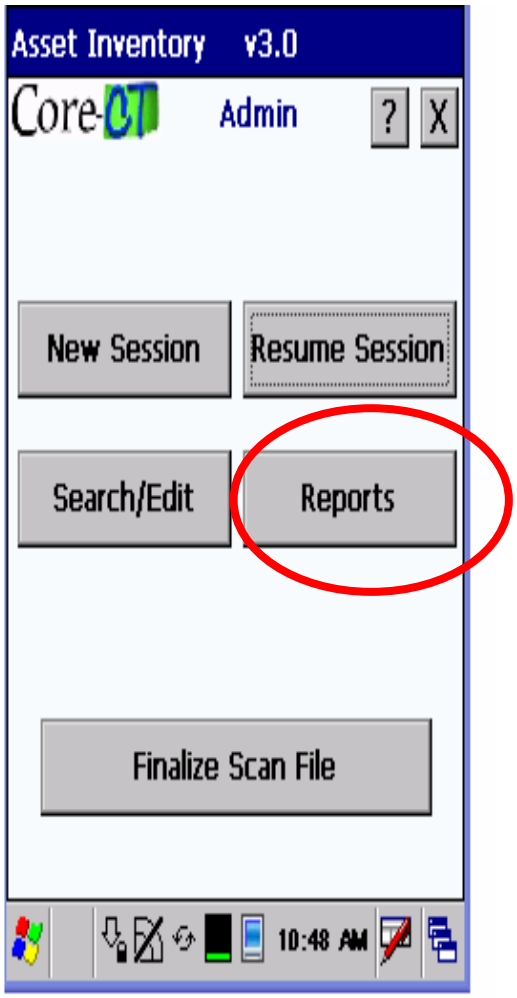




• **A message will be displayed that the record has been saved**

SCANNER

Reporting

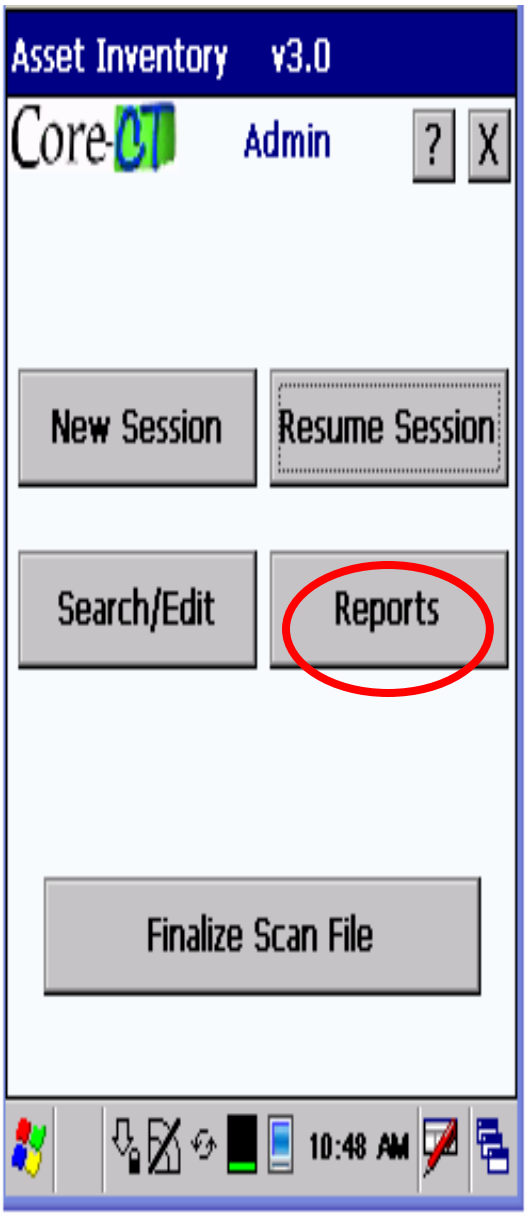


- **There are 3 reports on the scanner that will be useful in the field.**
- **You must be in an active session to run reports.**

SCANNER REPORTS

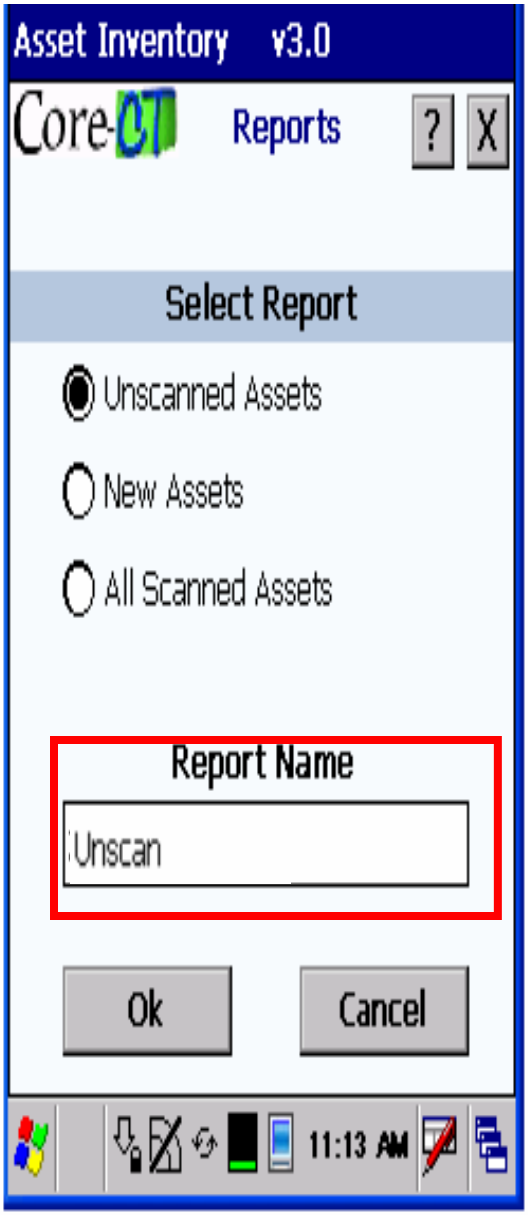
- **The system needs to update the processing records before the reports can be displayed.**
- **Press 'OK' on the screen to prepare the data, a message will be displayed when the process is complete.**

SCANNER REPORTS



• **You will be returned to the 'Admin' screen. Press 'Reports'.**

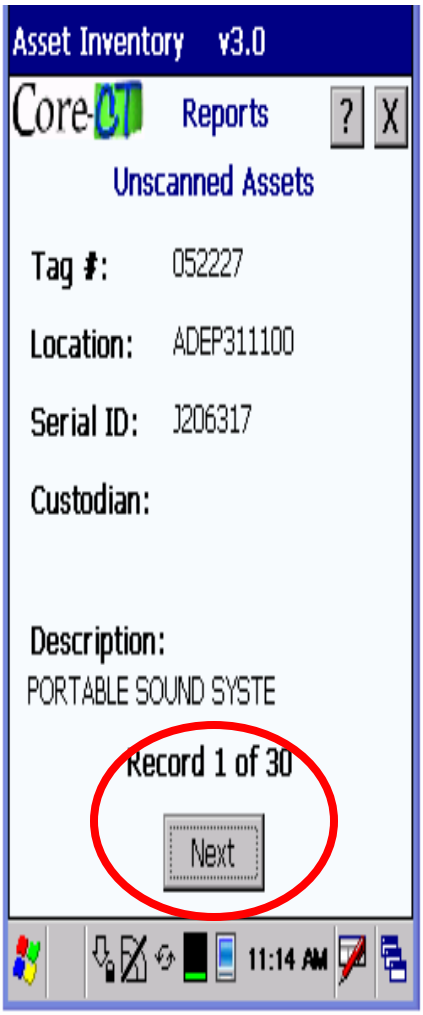
SCANNER REPORTS

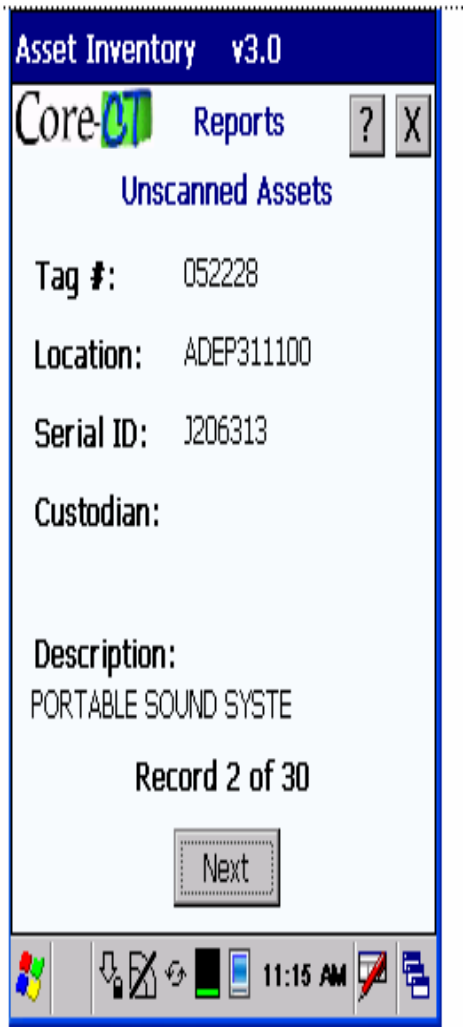


• **The first 2 reports must be given a name. Core-CT recommends naming the Unscanned assets report "Unscan" every time it is run.**

SCANNER REPORTS

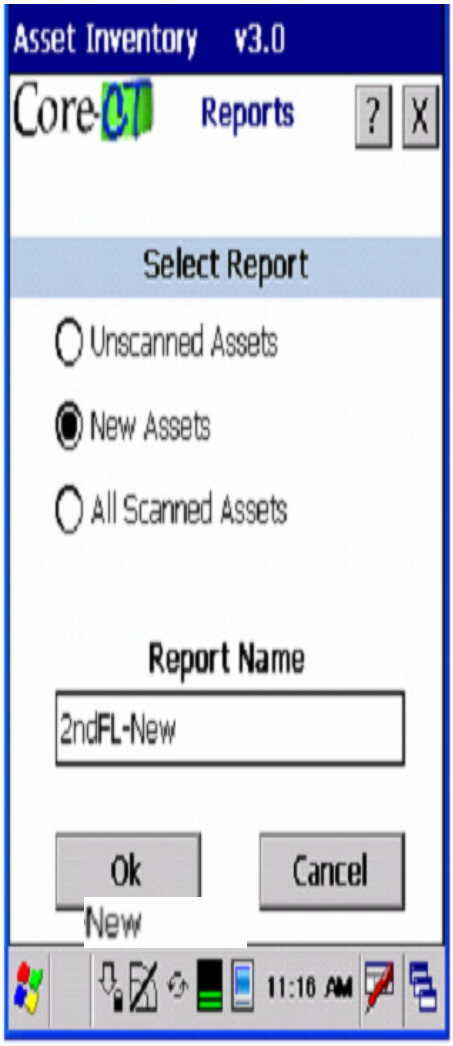
Extract File

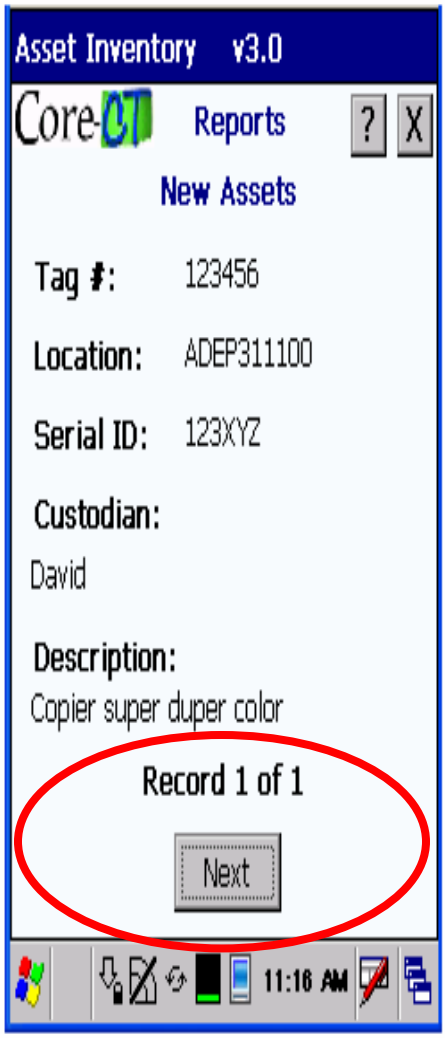




- **The assets display one at a time, which can be scrolled, but only forward as this is a flat file.**
- **At the bottom of the screen for the Unscanned Assets report is a count of the assets on the extract that have not been scanned.**
- **Keep in mind the fact that this unscanned report is looking at the extract file and there could be assets on the extract that you don't intend to scan in this inventory.**

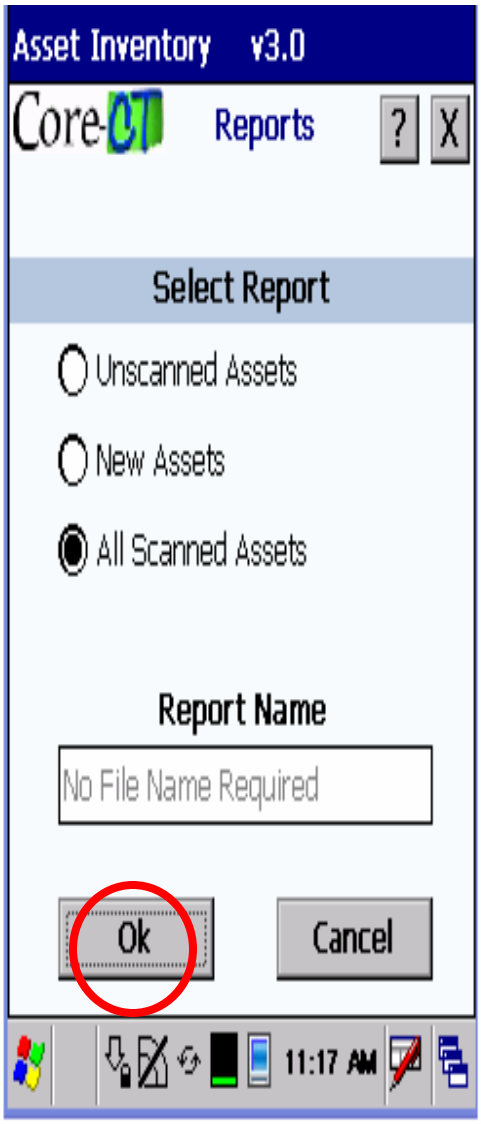
SCANNER REPORTS

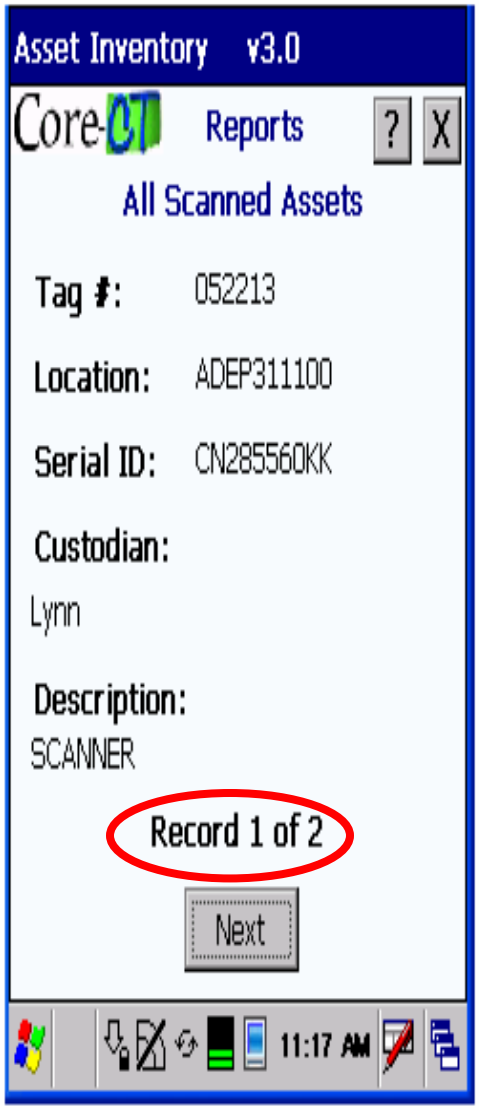




- **On the New Assets report, the count is of the Assets that you have added that are now on the scan file but were not on the extract file.**
- **Core-CT recommends that this report be named "New" every time it is run.**

SCANNER REPORTS

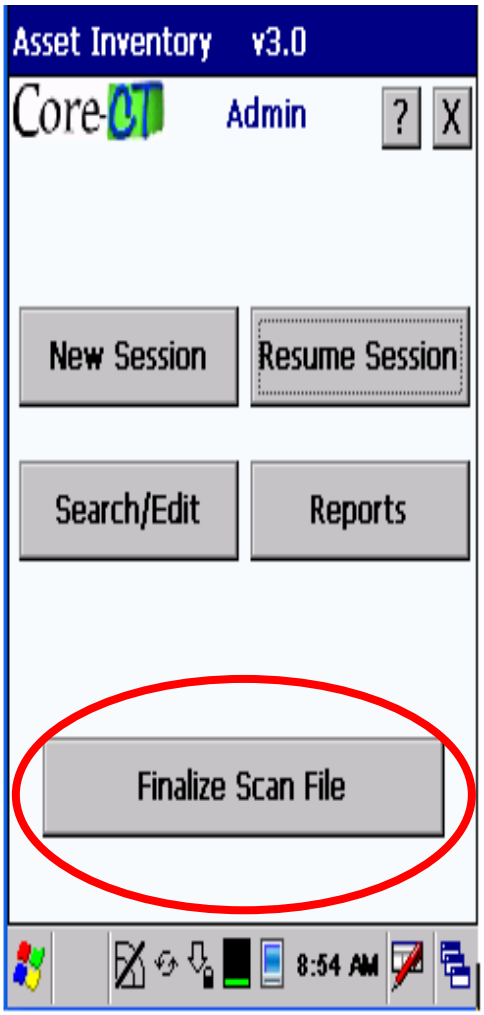




• **The last report will display all assets that have been scanned, with a count at the bottom of the screen**

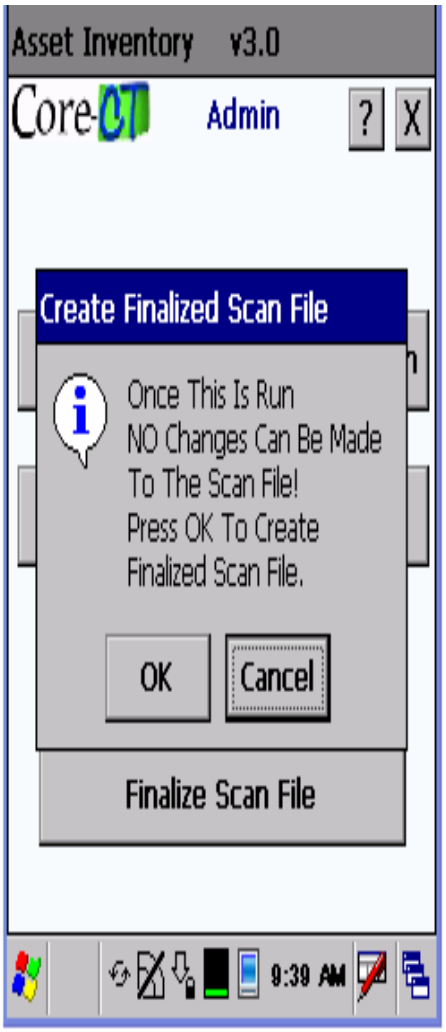
SCANNER

Finalize Scan File



- **Once the scanning process is complete the scan file must be finalized before being copied to the PC.**
- **Once the 'Finalize Scan File' process is run, you cannot continue with this session.**

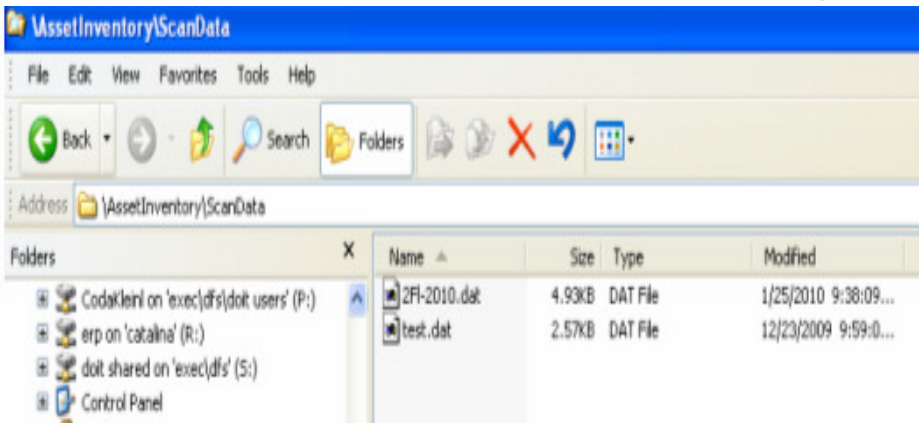
SCANNER

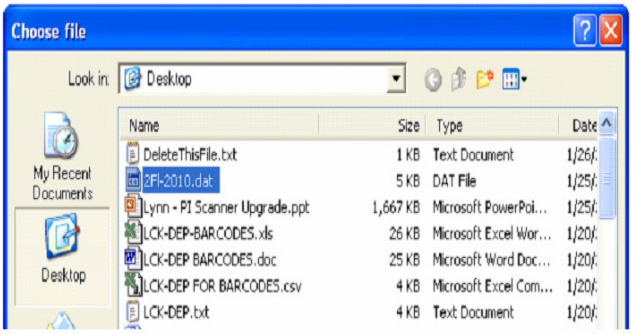


- **A message box is displayed reminding you that no further processing can be done on the scanner with this file.**
- **Press either 'OK' on the screen or 'Cancel'.**
- **A message will display once the process is complete.**

SCANNER

Navigation:Mobile Device>AssetInventory> ScanData





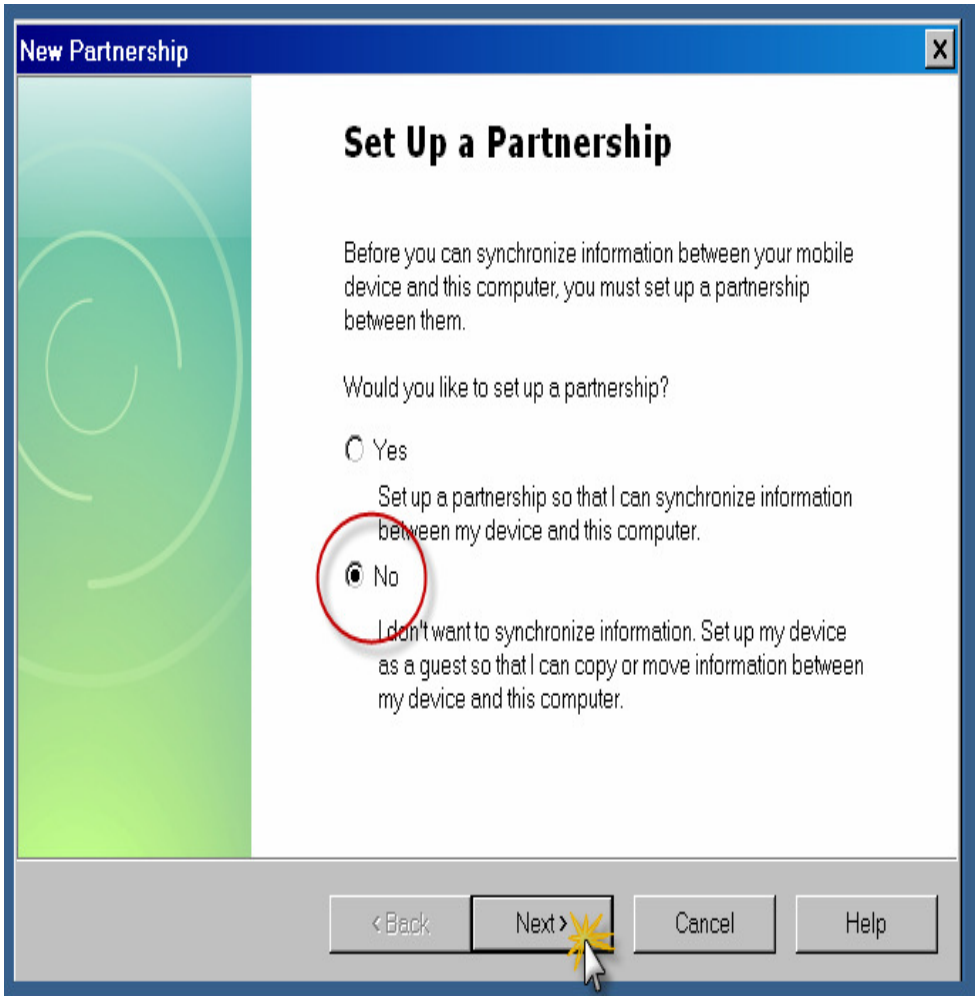
- **The scan file can now be uploaded to Core-CT.**
- **The file will be in the AssetInventory/ScanData directory and will have the name you gave it at the beginning of the process.**

SETUP/NAVIGATE

File Maintenance

SETUP/NAVIGATE

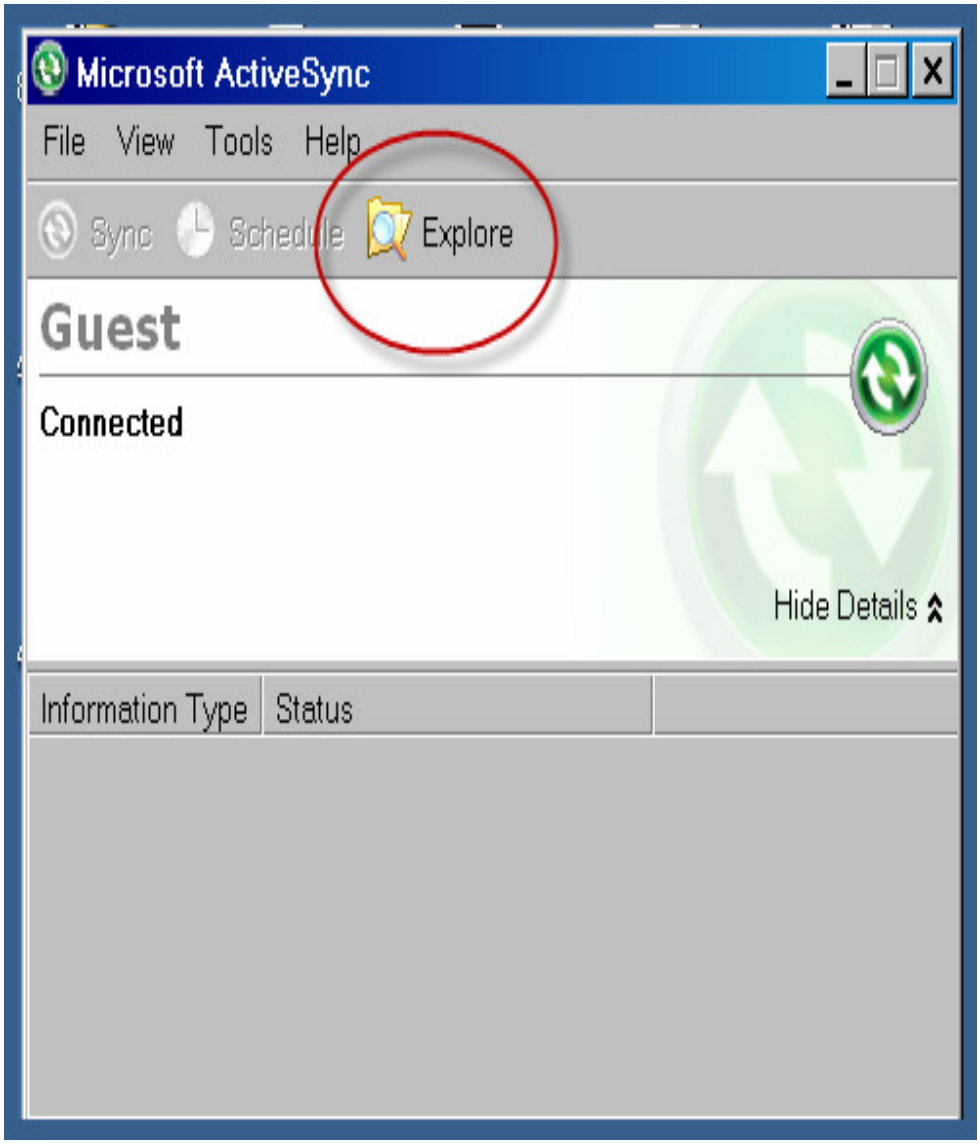
File Maintenance



- **Connect the charger base to the PC with a USB cable.**
- **With the scanner in the base, turn on the scanner.**
- **The following screen will appear on the PC.**
- **Select 'No' at the Set Up Partnership screen.**

SETUP/NAVIGATE

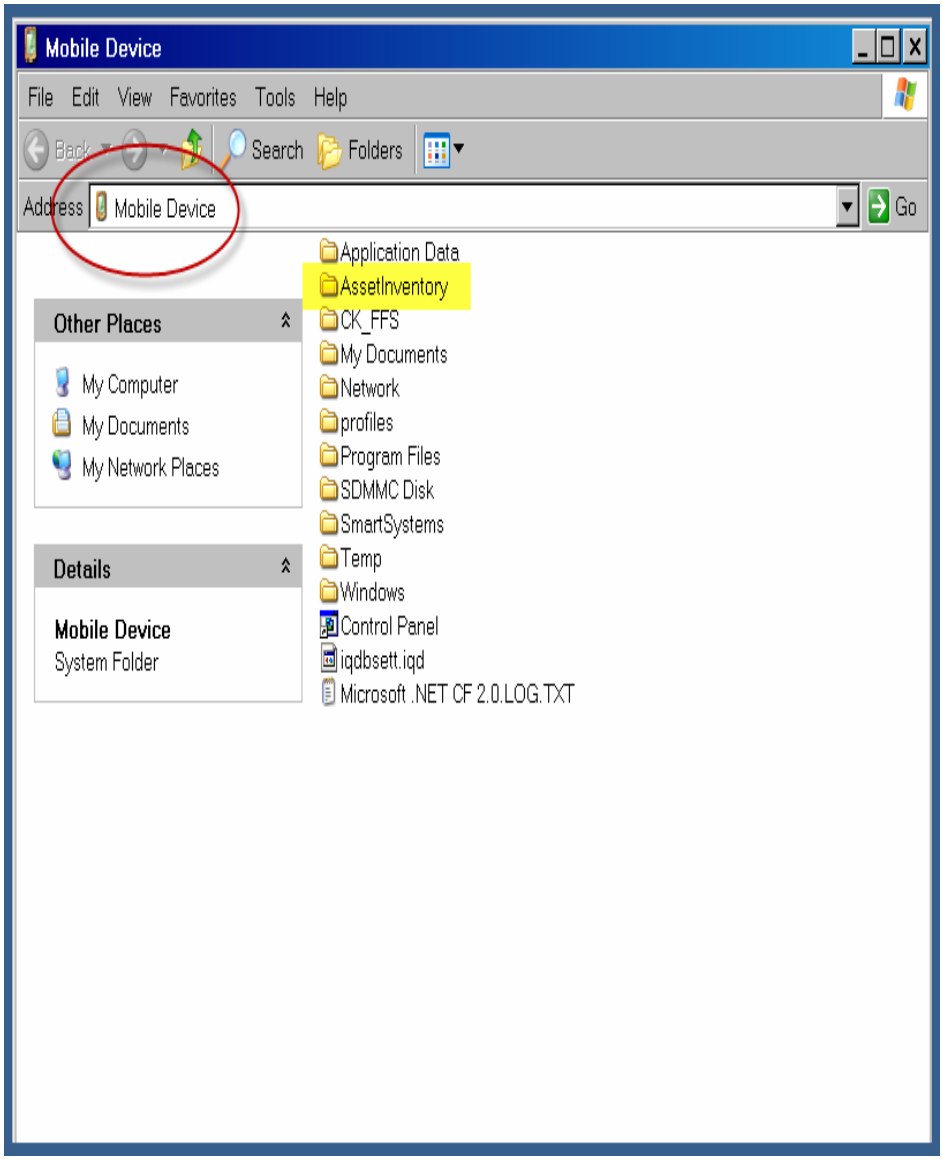
File Maintenance



• **The Explore link will display on the desktop. This will open the folders on the scanner.**

SETUP/NAVIGATE

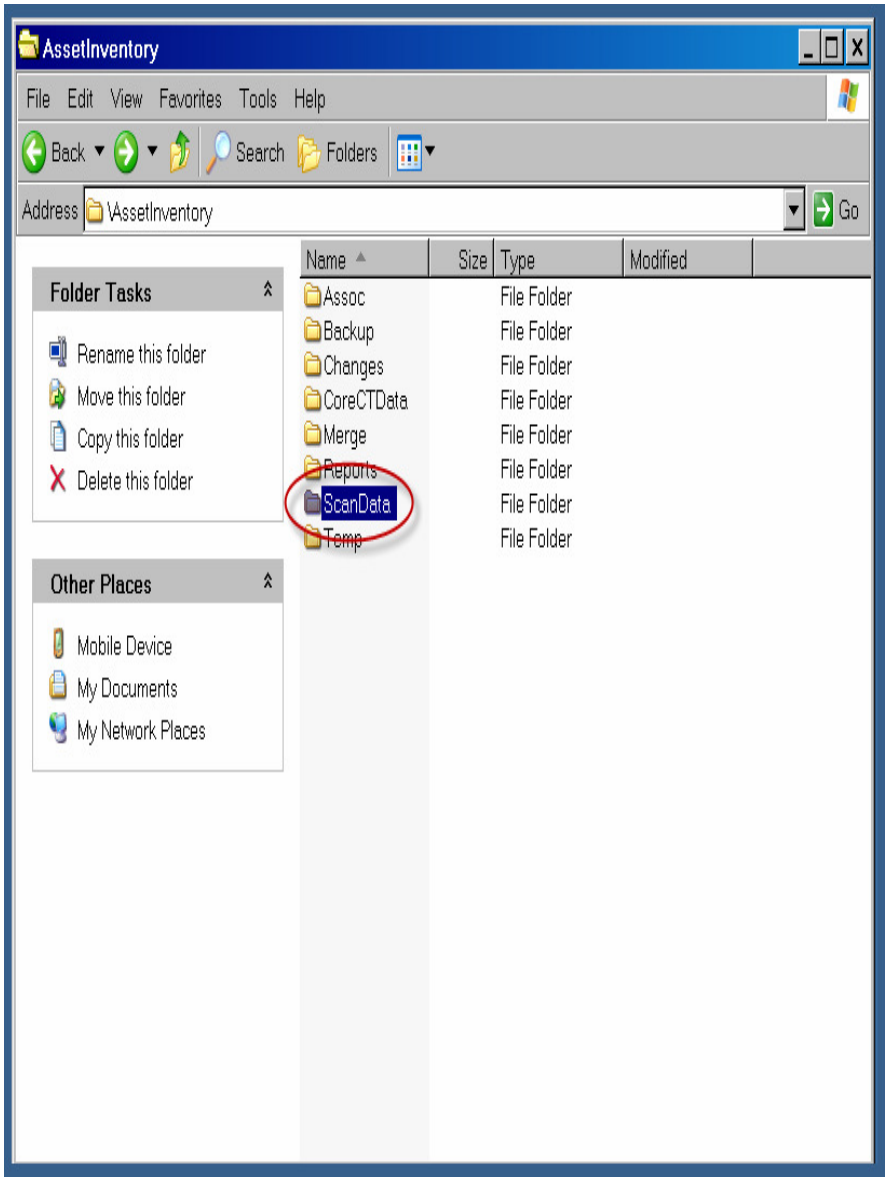
File Maintenance



• **The Mobile Device is the scanner. All of the scanner file folders are displayed. Open up the AssetInventory folder.**

SETUP/NAVIGATE

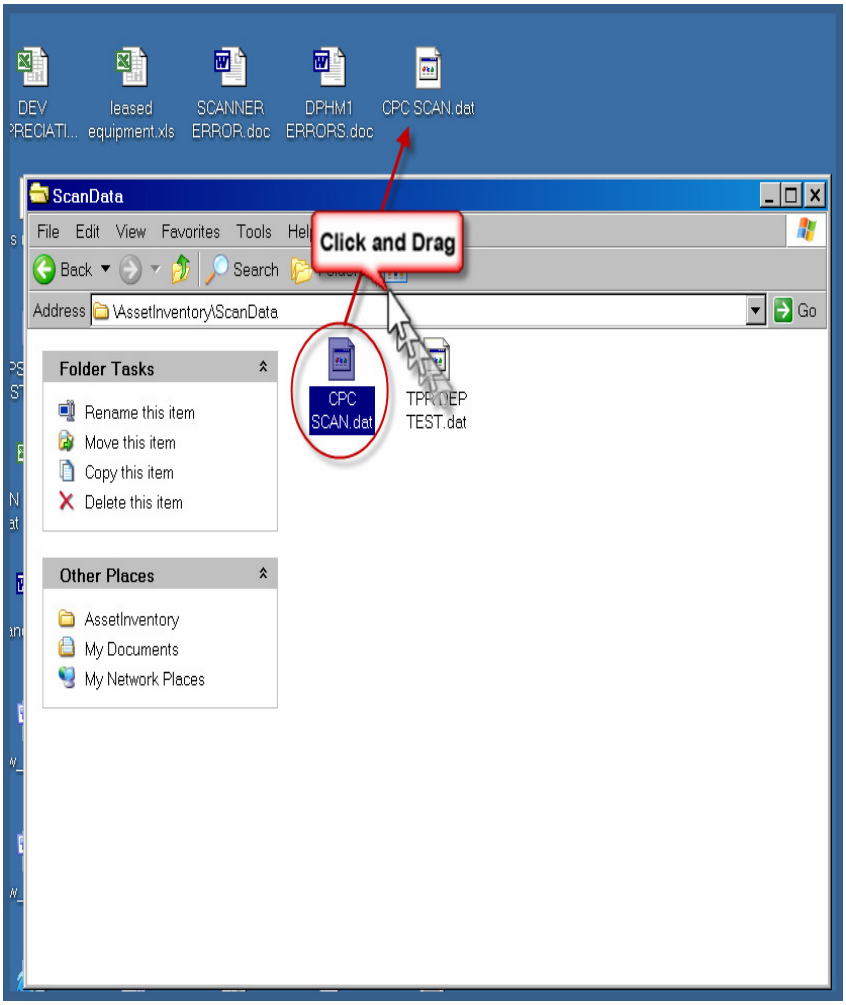
File Maintenance



- **The finalized file will always be located in the ScanData folder.**

SETUP/NAVIGATE

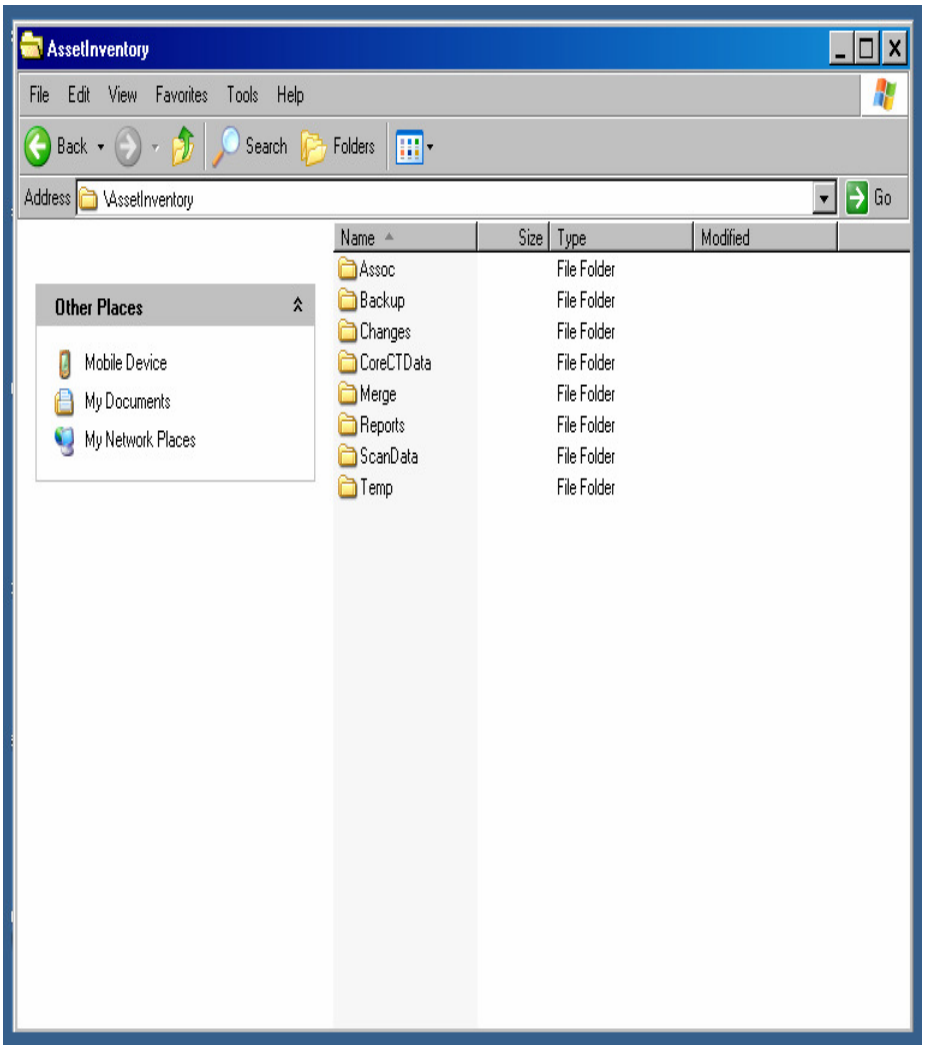
File Maintenance



- **Finalized files have a .dat extention.**
- **Click and drag the .dat file from the ScanData folder to the desktop on your computer.**
- **The file can now be emailed to your Central Office for further Physical Inventory processing.**

SETUP/NAVIGATE

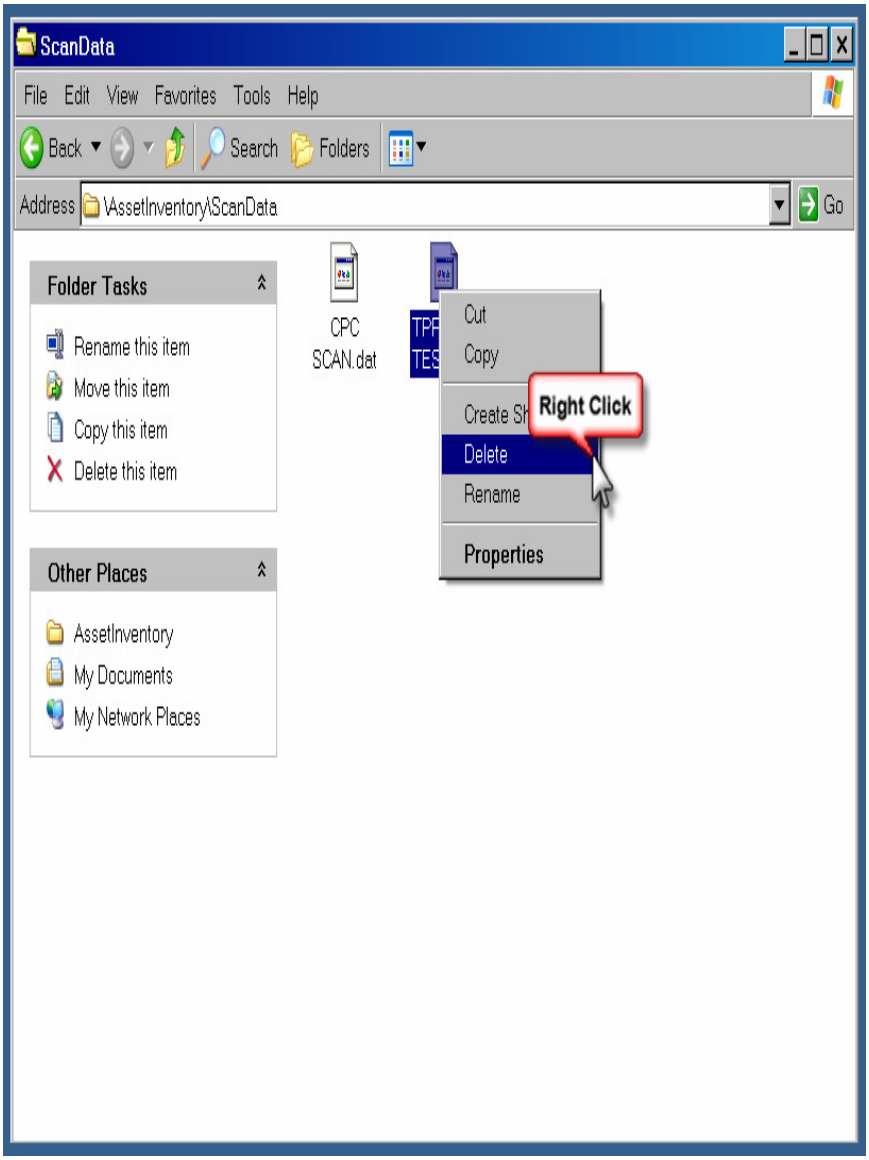
File Maintenance



- **The file cleanup process ensures that storage space is available on the scanner for the next inventory.**
- **Double click on each of the eight folders to display the files in each folder.**

SETUP/NAVIGATE

File Maintenance



- **Select the file to delete and then right click and Delete.**
- **This process can be performed directly on the scanner if desired, although it is easier to perform on the computer itself.**
- **All of the eight folders should now be empty.**