



## **PHYSICAL INVENTORY**

### **Software Application**



**Apex III**



**Apex IV**

## **Quick Start Manual**

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## **Introduction**

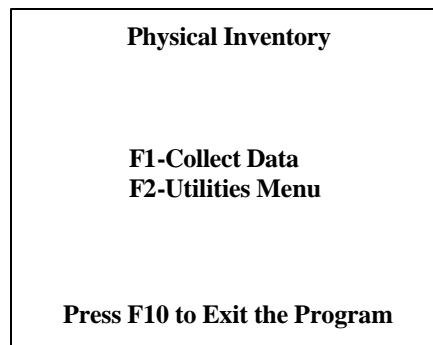
The Physical Inventory application was created and compiled using the Compsee Apex III & IV Program Generator. This software has been designed to allow the user to easily change data prompt names and disable unused data prompts from the Apex III & IV PDT.

## **Overview and Purpose**

The Physical Inventory software package is an application designed to collect information such as, location and quantity of items in a parts center.

## **Main Menu Screen**

The Physical Inventory Main Menu is the first screen to appear on the PDT when the user starts the application software. This menu contains two options, Collect Data and display Utilities Menu. Menu options are executed by pressing the corresponding function key located beside the menu text. The operator can press the F10 function key on the PDT to quit the current application software and return the DOS prompt or calling Program.



**Figure 1.0 The Main Menu Screen**

## Collect Data Screen

The Collect Data Screen is displayed once the operator has selected the F1 function key from the Main Menu. The following data prompt is displayed for input:

- **Location:** The location data prompt is an alphanumeric field with a maximum of 30 characters. Data entry can be keyed or scanned. Valid barcode symbologies are Code 128 and 3of9. . This data prompt is not a required field and can be disabled from the Modify Field Options screen. Once a data prompt is disabled, the application program does not display the input on the entry screen.
- **Item Number:** The item number data prompt is an alphanumeric field with a maximum of 30 characters. Data entry can be keyed or scanned. Valid barcode symbologies are Code 128 and 3of9. This data is a required field and cannot be disabled by the field options.
- **Count:** The count data data prompt is a numeric field with a maximum of 6 characters. Data entry is keyed from the PDT. This data prompt is not a required field and can be disabled from the Modify Field Options screen. Once a data prompt is disabled, the application program does not display the input on the entry screen.

Data is collected in the order of location, item number and count. Note, location and count are not required fields and may not appear if disabled from the Field Options screen.

Each time the Collect Data Menu option is selected from the Main Menu Screen, the user is prompted to enter all data in the collection order.

Pressing the F10 function key will close this screen and redisplay the Main Menu Screen.

<b>Physical Inventory</b> <b>Collect Data</b>
<b>Location</b> <u>100</u>
<b>Item Number</b> <u>101ABC</u>
<b>F10 to Return to Menu</b>

**Figure 1.1 The Collect Location and Item Data Screen**

The count data prompt is the last piece of data in a record set. The location and item number are displayed above the count data prompt.

Once all data is complete, a record is added to the “PHYINV.DAT” file. The user is then returned to the item number prompt and retains the location from the previous entry. The user can change the previous information by pressing the up arrow key to move to the desired data prompt.

<b>Physical Inventory</b> <b>Collect Data</b>
100
101
<b>Count</b> <u>199</u>
<b>Up Arrow – Edit Previous Field</b> <b>Press F10 to Return to Menu</b>

**Figure 1.2 The Collect Count Screen**

## **Editing Data**

The Physical Inventory application provides for easy editing of an item count. Editing is part of the data collection routine and is not a separate Main Menu option.

During the data collection routine, the application automatically checks for exiting item numbers within the specified location. If the location and item number currently entered matches a location and item number stored in the collection file, then the count is automatically displayed for editing, and the record is updated in the file.

## **Utilities Menu**

The Physical Inventory Utilities Menu is displayed once the user selects the F2 function key from the Main Menu. The following submenu options are available:

- **Modify Field Options:** Provides access to data prompt names and allows user to disable unused data entry prompts.
- **IR Communications Menu:** Infrared file communications options.
- **RS232 Communications Menu:** Serial file communications options.
- **Erase Data File:** Provides capability to erase the Physical Inventory data collection file.

Pressing the F10 function key will close this screen and redisplay the Main Menu.

### **Physical Inventory Utilities**

**F1-Modify Field Options**  
**F2-IR Communications**  
**F3-RS232 Communications**  
**F4-Erase Data File**

**Press F10 to Return to Menu**

**Figure 2.0 The Utilities Menu Screen**

## Modify Field Options

The Modify Field Options Menu displays the available data entry prompts and their defined prompt names displayed on the data collection screens. All data prompt text is user defined and can be changed by simply selecting the data prompt menu number. The Define Field Settings Screen is then displayed with the selected information.

Pressing the F10 function key will close this screen and redisplay the Main Menu.

**Note:** The Physical Inventory collection file must not contain data and should be erased before field configuration information can be modified. The following message is displayed if existing data is present in the collection file.

**Data exists in the  
Inventory file. Delete the  
data file before changing  
the configuration file.**

**Press Any Key**

Figure 2.1.1 The Erase Data File Warning Message

**Select a Field to Configure**  
  
**1-Location**  
**2-Item Number**  
**3-Count**  
  
**Enter an Option:**   
  
**F10 to Return to Main Menu**

Figure 2.1 The Modify Fields Menu Screen

## Define Field Settings

The Define Field Settings Screen is displayed with the selected data prompt information.

- **Enter a Field Name:** Type the text to be displayed on the data collection screen. Data prompt names are alphanumeric and are up to 30 characters long.
- **Active Field:** The active field option allows the user to disable unneeded data prompts. When the active field option is set to "N" or NO, the program does not display the data prompt and no data is collected from the PDT operator. Note: Required application fields cannot be deactivated. Refer to the "Data Collection Fields" chart for more information.
- **Update Field Information:** Selecting "Y" or Yes saves the defined data prompt information. The new data prompt name is reflected in the Modify Field Options Menu and in the data collection screens.

Pressing the F10 function key will close this screen and redisplay the Modify Field Options Menu.

**Define Field Settings**  
  
**Enter a Field Name:**  
**Count**  
**Active Field (Y/N):** Y  
  
**Update Field Information:** Y  
  
**F10 to Return to Config Menu**

Figure 2.1.2 The Define Field Setting Screen

## IR Communications Menu

The IR Communications Menu displays the available data file transfer options. The user can upload and download the data collection file (**PHYINV.DAT**) and field configuration files by selecting the appropriate submenu option.

- **Send Data File to the PC:** This option alerts the PDT operator to prepare the PC for IR Communications and then begins transferring the Physical Inventory data collection file to the PC. Once the transfer is complete, the user is prompted to erase the data collection file from the PDT.
- **Send Configuration File to the PC:** This option alerts the PDT operator to prepare the PC for IR Communications and then begins transferring the field configuration file to the PC.
- **Get Data File from PC:** This option alerts the PDT operator to prepare the PC for IR Communications and then begins receiving information from the PC.
- **Get Configuration File from the PC:** This option alerts the PDT operator to prepare the PC for IR Communications and then begins receiving information from the PC.

Pressing the F10 function key will close this screen and redisplay the Main Menu.

<p align="center"><b>IR Communications Menu</b></p> <p><b>1-Send Data File to PC</b> <b>2-Send Config File to PC</b> <b>3-Get Data File from PC</b> <b>4-Get Config File from PC</b></p> <p align="center">Enter an Option: <input type="text"/></p> <p align="center"><b>Press F10 to Return to Menu</b></p>
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**Figure 2.2 The IR Communications Screen**

## RS232 Communications Menu

The RS232 Communications Menu displays the available data file transfer options. The user can upload and download the data collection file (**PHYINV.DAT**) and field configuration files via serial communications, by selecting the appropriate submenu option.

- **Send Data File to the PC:** This option alerts the PDT operator to prepare the PC for RS232 Communications and then begins transferring the Physical Inventory data collection file to the PC. Once the transfer is complete, the user is prompted to erase the data collection file from the PDT.
- **Send Configuration File to the PC:** This option alerts the PDT operator to prepare the PC for RS232 Communications and then begins transferring the field configuration file to the PC.
- **Get Data File from PC:** This option alerts the PDT operator to prepare the PC for RS232 Communications and then begins receiving information from the PC.
- **Get Configuration File from the PC:** This option alerts the PDT operator to prepare the PC for RS232 Communications and then begins receiving information from the PC.

Pressing the F10 function key will close this screen and redisplay the Main Menu.

<p align="center"><b>RS232 Communications Menu</b></p> <p><b>1-Send Data File to PC</b> <b>2-Send Config File to PC</b> <b>3-Get Data File from PC</b> <b>4-Get Config File from PC</b></p> <p align="center">Enter an Option: <input type="text"/></p> <p align="center"><b>Press F10 to Return to Menu</b></p>
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**Figure 2.3 The RS232 Communications Menu Screen**

## Physical Inventory Erase Data

The Erase Data File Screen is displayed once the user selects the F4 function key from the Utilities Menu. The operator is prompted for deletion verification and the data collection file is erased once the user selects “Y” or Yes. Selecting an “N” or No cancels the data file deletion operation and the Main Menu is displayed.

Pressing the F10 function key will close this screen and redisplay the Main Menu.

**Physical Inventory Utilities**  
**Erase Data File**

**This option erases the Physical Inventory file from The PDT. Are you sure you want to erase the data file? (Y/N) N**

**F10 to Return to Main Menu**

**Figure 2.4 The Erase Data Screen**

## Data Collection Fields

The following chart depicts the available data prompts used by the Physical Inventory application software.

- Data Prompt Name is the user-defined text displayed during data entry.
- Application Required Fields are always required for valid data entry and cannot be disabled or turned off by the operator.
- Data Prompt Characters defines the maximum number of characters displayed for a data prompts title. The Field Size is the total number of characters allowed for a prompts data entry.
- The Data Type defines valid input for data entry. A/N is alphanumeric and N is numeric only.

File Name = **PHYINV.DAT**

<i><b>Data Prompt Name</b></i>	<i><b>Application Required Field</b></i>	<i><b>Data Prompt Max Characters</b></i>	<i><b>Field Size</b></i>	<i><b>Type</b></i>
Location	NO	1-30	0-30	A/N
Item Number	YES	1-30	1-30	A/N
Count	NO	1-30	0-6	N
Date/Time	YES	System Controlled		