

Apex IITM

By



PORTABLE DATA COLLECTION TERMINAL

Manual #: COAMIIIUG0000

Operations & Programming Manual

PART 2 – Apex-Trak

COMPSEE, INC.

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Table of Contents

1 INTRODUCTION	3
Using This Manual	4
How This Manual Is Organized	4
2 INVENTORY AND TRACKING PROCEDURES	
AND THE Apex II	4
Using Apex-Trak In Item Tracking and Inventory Systems	6
Apex II Physical Description - Controls and Indicators	6
Apex-Trak Main Menus	8
3 OVERVIEW OF Apex II Apex-Trak PROCEDURES	9
Asset Inventory	10
Item Track	12
Physical Inventory	13
4 GENERAL Apex II AND Apex-Trak PROCEDURES	14
Power the Apex II On and Off	14
Adjust the Contrast Level	15
Reboot the Apex II	16
Apex-Trak Main Menu Procedures	16
Access Asset Inventory, Item Track, or Physical Inventory	17
Navigating Through Apex-Trak Menus and Options	17
Using the <ALT> Key	18
Set Date and Time	18
View the Amount of Free Memory	19
Read Bar Codes	19
View the Compsee Introduction	20
Apex-Trak General Procedures	21
Quit the Current Program	21
Set Options	22
Transfer Data To a PC	27
Other LinkMaster Procedures	31
5 ASSET INVENTORY PROCEDURES	36
Quit To Main Menu	37
Collect Asset Inventory Data	37
View And Edit Inventory Data	39
Transfer Asset Inventory (AIfile) Data	40
Set Options	40
6 ITEM TRACK PROCEDURES	43
Quit To Main Menu	43
Issue Item	44
Return Item	45
Stock Item	46
Transfer Item Track (ITFILE) Data	47
Set Options	47
7 PHYSICAL INVENTORY PROCEDURES	49
Quit To Main Menu	50
Collect Data	50
Transfer Physical Inventory (PIFILE) Data	54
Set Options	54

List of Figures

Figure 2-1. Typical Asset Tracking/Inventory Process	5
Figure 2-2. Typical Item Tracking System	5
Figure 2-3. Typical Physical Inventory Procedure	5
Figure 2-4. Apex II (Without Scanner) Controls and Indicators	7
Figure 2-5. Apex-Trak Main Menu	8
Figure 2-6. Main Menus For Apex-Trak Inventory/ Tracking Programs	9
Figure 3-1. Typical ASCII File For Asset Inventory	11
Figure 3-2. Typical ASCII File for Item Track	13
Figure 3-3. Typical ASCII File for Physical Inventory	14

List of Tables

Table 2-1. Apex II Controls and Indicators	7
Table 3-1. Quick Reference To Apex-Trak Procedures	10
Table 3-2. Asset Inventory Data Field Descriptions	11
Table 3-3. Item Track Data Field Descriptions	12
Table 3-4. Physical Inventory Data Field Descriptions	13
Table 4-1. Apex-Trak General Procedures	21

1 INTRODUCTION

This is the second of four parts of the *Apex II Portable Data Collection Terminal Manual*. This part of the manual describes the hardware and human/computer interface procedures. In this part, the term “operator” applies to all levels of personnel who operate the Apex II and Apex-Trak to collect data.

The Apex II contains Apex-Trak factory installed software. Apex-Trak includes the Asset Inventory (AI), Item Track (IT), and Physical Inventory (PI) programs.

Since the programs are factory installed, the novice can begin using the Apex II immediately. The novice can read this manual to become familiar with automated tracking and inventory procedures as well as the Apex II and Apex-Trak features.

Apex-Trak streamlines and expedites the collection of data into files that are later transferred to the operator’s PC. The Apex II travels with the operator to where inventory items are located. Since the need for writing and editing data on paper is eliminated, productivity is increased and errors are reduced. If scanning capability is added, both productivity and error reduction improve dramatically.

The Apex II and Apex-Trak support the scanning of bar codes and identifying bar code symbology. This is accomplished by purchasing one of the Apex II models that include a standard or long range scanner, or by attaching another scanning unit to the Apex II.

An experienced operator can use this manual to learn about the Apex II and Apex-Trak features. Computer software designers and programmers can use this manual to learn about and evaluate the functionality of Apex-Trak.

While these programs accommodate a variety of data collection application needs, the code can be modified to meet any data collection requirements. Programmers can modify the delivered code, or can purchase the optional Compsee Apex II Program Generator to facilitate the process.

The Apex-Trak program includes a print driver for portable bar code label printers. Printers may be purchased separately from Compsee.

Using This Manual

After reading and working through the procedures in this manual a few times, you will be comfortable with Apex-Trak. You will probably only use this manual as a reference.

When problems and questions arise, you can refer to the Table of Contents of the manual to quickly find the appropriate topic.

Within this manual, the following typographic conventions are followed:

- **Bold** type is used for headings.
- < > Angular brackets are used to enclose hard keys (keys whose name and function do not change) located on the Apex II or PC, such as <ALT> and <Enter>.
- Underlined type is used for titles that refer to manuals.
- Important points are included as notes. Note headings are printed in ***bold italic*** typeface. Notes are centered on the page.
- Caution and warning messages provide information which, if not observed, could result in equipment damage, data loss, or personal injury. Caution and warning messages are shown in boxes.

How This Manual Is Organized

This manual is designed for:

- Initial self-instruction
- Quick reference for procedures that are performed only occasionally

Chapters 1 and 2 introduce you to this manual and the Compsee Apex-Trak programs installed in the Apex II portable collection terminal.

Chapter 3 is an overview of the Apex II Apex-Trak Operations, including a description of the hardware and software controls and indicators.

Chapter 4 walks you through step-by-step Apex II Apex-Trak General Operations such as powering the unit on and off, navigating through the Apex-Trak menus, and setting Apex-Trak options.

Chapter 5 walks you through step-by-step Asset Inventory Procedures.

Chapter 6 walks you through step-by-step Item Track Procedures.

Chapter 7 walks you through step-by-step Physical Inventory Procedures.

2 INVENTORY AND TRACKING PROCEDURES AND THE Apex II

Inventory procedures involve finding and counting assets, supplies, tools, data, or other items that can and are accounted for in an organization. Tracking follows the course and progress of an item as it circulates through an organization. Figure 2-1, Figure 2-2 and Figure 2-3 illustrate typical inventory and tracking processes.

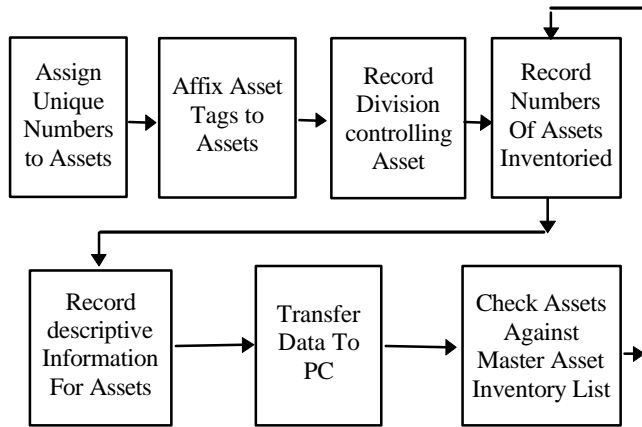


Figure 2-1. Typical Asset Tracking/Inventory Process

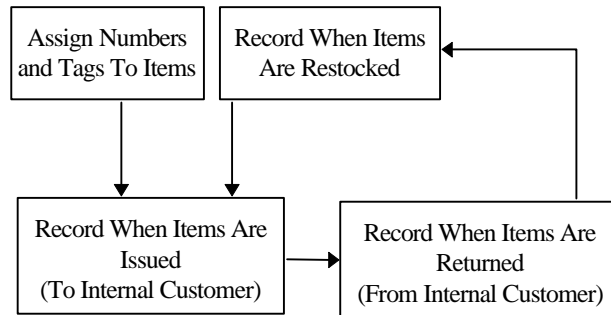


Figure 2-2. Typical Item Tracking System

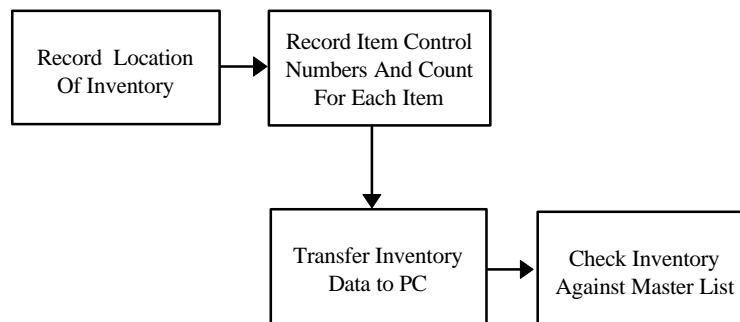


Figure 2-3. Typical Physical Inventory Procedure

Using Apex-Trak In Item Tracking and Inventory Systems

Apex-Trak includes many features to streamline data entry into inventory and tracking systems. With Apex-Trak, you can:

- Automatically, electronically record the date and time each item was inventoried, a data record was updated, or the movement of an item was recorded.
- Use multiple portable data collection terminals to enter data.
 - Store approximately 3,000 items in each terminal (refer to page 9 for more specific information).
- Transfer data through an RS-232 cable to a host system, either directly to an ASCII file on the PC or via a Compsee Wedge.
- Modify the names and lengths of fields.

The following optional features are available if the associated hardware is purchased for the Apex II Apex-Trak system.

- Scan commercial and Apex-Trak bar codes.
 - Collect tracking data by scanning bar codes on items.
 - Use multiple scanning devices to enter data.
- Print barcoded tags from a portable bar code printer.

With the Asset Inventory Apex-Trak program, you can:

- Add, view, and edit data records during inventory.
- Use a minimum of 4 fields and maximum of 8 fields of data for each asset being tracked.
- Record observable information (such as physical description, remarks, condition) electronically as inventory is being performed.

With the Item Track Apex-Trak program, you can:

- Record when an item is issued, returned, and restocked electronically as the event occurs.
- Record the individual or group to whom the item is issued and the number of days the item is checked out for.
- Use either 5 or 6 fields of data for each item being tracked.

With the Physical Inventory Apex-Trak program, you can:

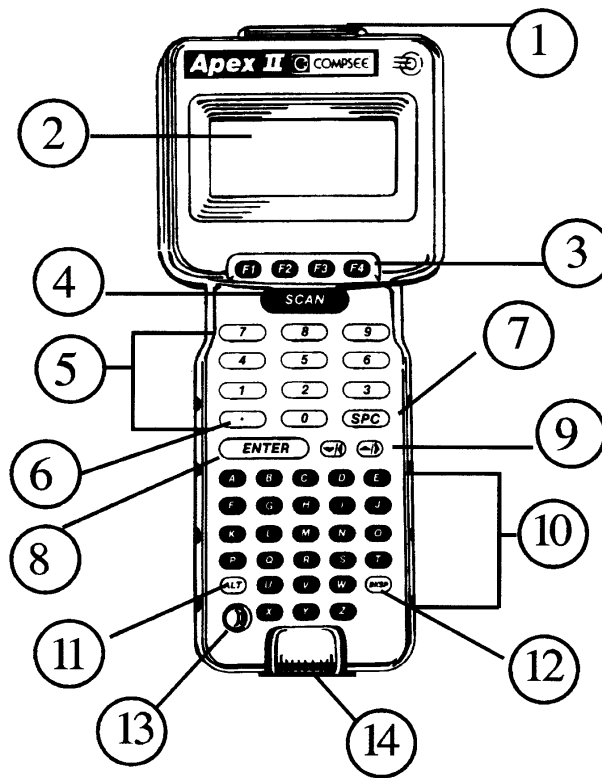
- Record locations that are inventoried, items found in each location, and the count for each item.
- Use either 4 or 5 fields of data for each item being inventoried.

Apex II Physical Description - Controls and Indicators

Figure 2-4 illustrates, and Table 2-1 describes, the Apex II controls and indicators used in Apex-Trak procedures.

The <ALT> key is used in combination with some of the other keys to perform special procedures, described in Chapter 4.

Only keys used with Apex-Trak are described here. Refer to Part 1, User's Manual, for descriptions of how these keys are used when the Apex II is in other modes of operation.



Apex5drw

Figure 2-4. Apex II (Without Scanner) Controls and Indicators

Table 2-1. Apex II Controls and Indicators

No.	Control/ Indicator	General Function
1.	Scanner Port	Nine pin connector for scanning device. On the model with the Apex II Scanner, the factory installed scanner covers this port.
2.	LCD Screen	Displays data entered by operator and data sent to the operator from the Apex II programs.
3.	F1/F2/F3/F4 Function Keys	In the Compsee Introduction, F1 pauses the screen and F4 advances to the next screen after it has been paused. F2 and F3 are not used in the Apex-Trak factory installed programs.
4.	<SCAN> key	Green in color. When a scanner is attached to the Apex II, turns on the scanning (infrared) beam.
5.	Numeric Keypad	Used for keypad entry of numeric data (0-9) and responses to prompts from the Apex II programs.
6.	<.> (period) key	On the numeric keypad. Not used in the Apex-Trak factory installed programs. It can be defined to be used as a decimal point.
7.	<SPC> Key	On the numeric keypad. Functions like the Spacebar on a typewriter or PC.

No.	Control/ Indicator	General Function
8.	<ENTER> Key	Green in color. Used to accept keypad entry as input into the Apex-Trak programs.
9.	Arrow Keys	When pressed, scroll through option menus that are too long to display completely at one time on the LCD screen.
10.	Alpha Keypad	Used for keypad entry of data (A-Z) and responses to prompts from the Apex II programs.
11.	<ALT> Key	By itself, enables or disables the cursor. Used in conjunction with other keys to perform some functions (see Chapter 4).
12.	<BKSP> Key	Functions like the Backspace key on a typewriter or PC.
13.	Power On/Off Button	Red in color. Used to turn the Apex II on and off.
14.	RS-232 Port	RJ 10 (phone) connector for cable connecting the Apex II to the PC.

Apex-Trak Main Menus

Procedures from the menus shown on this page are described in Chapters 3 through 7.

Apex-Trak's main menu contains eight options (Figure 2-5).

- The main menu is longer than the LCD screen.
- The operator presses the arrow keys to display more of the menu.

```
=== Apex II ===
A) sset Invent
I) tem Track
P) hysical Invent_
```

```
=== Apex II ===
S) et Date & Time
F) ree Memory
R) ead Bar Codes
```

```
=== Apex II ===
C) ompsee Intro
Q) uit= Power Off
```

Figure 2-5. Apex-Trak Main Menu

When the operator selects one of the first three main menu options, the associated submenu is displayed. Pressing the key for the first letter of an option selects it.

The other main menu options do not have submenus. When these options are selected, a procedure begins. Figure 2-6 shows the first three main menu options and the submenus displayed when each is selected.

<pre> === Apex II === A) sset Invent I) tem Track P) hysical Invent_ </pre>		
<pre> == Asset Invent == C) ollect Data V) iew and Edit T) ransfer Data </pre>	<pre> ===Item Track=== I) ssue R) eturn S) tock </pre>	<pre> ===Phy Invent=== C) ollect Data T) ransfer Data O) ptions </pre>
<pre> == Asset Invent == O) ptions Q) uit </pre>	<pre> ===Item Track=== T) ransfer Data O) ptions Q) uit </pre>	<pre> ===Phy Invent=== Q) uit </pre>

Figure 2-6. Main Menus For Apex-Trak Inventory/Tracking Programs

3 OVERVIEW OF Apex II Apex-Trak PROCEDURES

Apex-Trak is a commercial, off-the-shelf, general use inventory and tracking software product. As such, Apex-Trak does not showcase the sophisticated programming capabilities of the Apex II.

However, all three programs are straightforward and easy to learn. These simple programs are designed for collecting all the data necessary for most inventory and tracking needs. An experienced programmer can easily modify the installed code to meet any custom program design needs.

During the scanning process, location and item bar codes can be printed from the Apex II using a portable bar code printer. With the communication software provided, the data collected can easily be exported to a host PC for processing and reports.

One Apex II unit can be used to collect data in all three programs, or multiple Apex II units can be used. The number of records an Apex II can hold depends upon the Apex II model; the data collection programs you use; the number of fields you use; and the length of the fields. The following tables give the capacity for each program installed in each size terminal.

128 K Terminal		512 K Terminal	
Asset Inventory	400 Records	Asset Inventory	3000 Records
Item Track	1000 Records	Item Track	9000 Records
Physical Inventory	1000 Records	Physical Inventory	9000 Records

1 Meg Terminal	
Asset Inventory	9000 Records
Item Track	18000 Records
Physical Inventory	18000 Records

For example, the tables show that if you are collecting only Item Track and Physical Inventory data on a 512 K terminal, you can hold 9000 total records on the Apex II. You would need to upload the data to a PC and erase the data on the Apex II before adding more data.

If you are collecting an equal amount of all three kinds of data on a 512 K terminal, the data capacity would be about 7000 records (the average of 3000, 9000, and 9000).

Table 3-1 lists and describes Apex-Trak procedures in alphabetical order. The table also lists the page on which each procedure begins.

Table 3-1. Quick Reference To Apex-Trak Procedures

To Do This Procedure	Proceed To Page
Access Asset Inventory, Item Track, or Physical Inventory	17
Adjust the Contrast Level	15
<ALT> Key, Using	17
Collect Inventory Data (Asset Inventory)	37
Collect Data (Item Track)	43
Collect Data (Physical Inventory)	50
Erase Data File	26
Field Options	
Asset Inventory	40
Item Track	47
Physical Inventory	54
Issue Item	44
Navigating Through Apex-Trak Menus	17
Other LinkMaster Procedures	31
Power the Apex II On and Off	14
Printer Options	23
Quit the Current Program (Asset Inventory, Item Track, or Physical Inventory)	21
Read Bar Codes	19
Reboot the Apex II	16
Restock Item	46
Return Item	45
Set Date and Time	18
Set Options	22
Transfer Data To a PC	27
Upload Options	24
View and Edit Inventory Data (Asset Inventory)	39
View the Amount of Free Memory	19
View the Compsee Introduction	20

Asset Inventory

This program streamlines and expedites the collection of asset inventory data. It is used with equipment, furniture, and other assets that organizations periodically account for and inventory.

The operator goes to the various places where the assets are located. The operator scans or keys the asset numbers displayed on tags physically attached to the assets. The operator enters data by major and minor divisions, which represent regions, buildings, rooms, or other useful divisions describing the physical location or department control of assets. In addition, the operator may enter a description, remarks, and the condition of each asset.

The data is then uploaded to a host program to be used in an asset tracking/inventory database system.

As installed, this program is straight forward, easy to use, and meets most data collection needs. A computer programmer could modify Apex-Trak to meet any asset inventory requirements.

Table 3-2 lists and describes the Asset Inventory data fields. The operator enters data for all fields except the date and time stamps. The Apex II Apex-Trak program automatically enters the date and time as a record entry is completed. These fields are user definable in name and length. Fields which are not required can be turned off by setting the field length to zero.

Table 3-2. Asset Inventory Data Field Descriptions

Fields	Size	Type
Major Division*	8	Alpha/Numeric, Right justified, Zero filled.
Minor Division	8	Alpha/Numeric, Right justified, Zero filled.
Item Number*	16	Alpha/Numeric, Right justified, Zero filled.
Item Desc.	16	Alpha/Numeric, Left justified.
Remarks	16	Alpha/Numeric, Left justified.
Condition	16	Alpha/Numeric, Left justified.
Date*	6	Date, in the form YYYYMMDD (19950928).
Time*	5	Time, in the form HH:MM, in 24 hour format (23:30).
* Required fields are identified by an asterisk next to their names.		

When data from the Asset Inventory program is transferred to the PC using procedures starting on page 27, the file is named AIFILE. Characters for each record are in strings. Each record is separated by a carriage return. Fields are padded with spaces to their defined length, but are not separated from other fields of a record by spaces or tabs.

Figure 3-1 illustrates a typical ASCII file for Asset Inventory. Columns in the table and figure are shaded to make the ASCII file easy to read.

00000001	00000023	0000A 9302 83746	COMPUTER, IBM	MODEL NO 5559933	NEW	19960205	10:41
00000001	00000023	0000A 9302 84029	EXECUTIVE DESK		POOR	19960205	10:45
00000001	00000023	0000A 9302 83333	ROUND TABLE		GOOD	19960205	10:47
00000001	00000023	0000A 9302 83777	STORAGE BIN		NEW	19960205	10:49
00000002	00000023	0000A 9302 8186	COMPUTER, MAC	MODEL NO 5422232	NEW	19960205	12:37
00000002	00000045	0000A 9302 8927	COMPUTER, DEC	MODEL NO 9793737	FAIR	19960205	12:38
00000002	00000045	0000A 9302 8222	CHAIR, ERGONOM	ON LEFT ARM REST	SCRATCHED	19960205	12:39
00000002	00000045	0000A 9302 83157	FAX MACHINE		OBSOLETE	19960205	12:45

Figure 3-1. Typical ASCII File For Asset Inventory

Item Track

This program tracks the movement of items and creates an audit trail. It is used with documents and other items that are stored in one location, checked out to individuals or groups, and returned to the storage location.

The operator scans or keys barcoded tracking tags physically attached to the items being tracked (paper documents, boxes of documents, tape cassettes, evidence, tools, returnable supplies, or other items that are circulated within an organization).

In addition, the operator keys the latest movement of the item: issued to an appropriate team or individual (destination); returned to the team responsible for item tracking and control; or returned to stock in a designated location.

The data is then uploaded to a host program to be used in an item tracking/inventory database system.

As installed, this program is straight forward, easy to use, and meets most data collection needs. A computer programmer could modify Apex-Trak to meet any item tracking requirements.

Table 3-3 lists and describes the Item Track data fields. The operator enters data for all fields except the date and time stamps. The Apex II Apex-Trak program automatically enters the date and time as a record entry is completed. The fields are user definable in name and length. The Return Days field, which is not required, can be turned off by setting its length to zero.

Table 3-3. Item Track Data Field Descriptions

Fields	Size	Type
Item Number*	8	Alpha/Numeric, Right justified, Zero filled.
Item Destination*	8	Alpha/Numeric, Right justified, Zero filled. This field is used for destination when an item is Issued, and the location during the Stock procedure. When an item is returned, Apex-Trak automatically fills this field with XXXXs to indicate the item is returned to the controlling department.
Return Days	3	Numeric, Right justified, Zero filled.
Movement Code*	1	Alpha.
Date*	6	Date in the form YYYYMMDD (19950928).
Time*	5	Time, in the form HH:MM, in 24 hour format (23:30).
* Required fields are identified by an asterisk next to their names.		

When data from the Item Track program is transferred to the PC using procedures starting on page 27, the file is named ITFILE. Characters for each record are in strings. Each record is separated by a carriage return. Fields are padded with spaces to their defined length, but are not separated from other fields of a record by spaces or tabs.

Figure 3-2 illustrates a typical ASCII file for Item Track. Columns in the table and figure are shaded to make the ASCII file easy to read.

36827615	DEPT0651	030	I	19960105	12:31
69182605	DEPT0651	007	I	19960105	12:31
31849051	XXXXXXXX		R	19960105	12:31
36170518	XXXXXXXX		R	19960105	12:32
03651948	XXXXXXXX		R	19960105	12:32
31958177	CABNIT01		S	19960105	12:33
61908524	CABNIT08		S	19960105	12:33
3319HGEM	CABNIT55		S	19960105	12:33

Figure 3-2. Typical ASCII File for Item Track

Physical Inventory

This program expedites the simple physical inventory process. The operator goes to the physical storage locations for inventory (office supplies, documents, tools, assets, or other items). The operator keys or scans the location being inventoried; scans or keys the item numbers displayed on tags physically attached to the items; and then keys the quantity of the scanned items.

The data is then uploaded to a host program to be used in an inventory/tracking database system.

As installed, this program is straight forward, easy to use, and meets most data collection needs. However, a computer programmer could modify Apex-Trak to meet any physical inventory needs.

Table 3-4 lists and describes the Item Track data fields. The operator enters data for all fields except the date and time stamps. The Apex II Apex-Trak program automatically enters the date and time as a record entry is completed. The Item Location field, which is not required, can be turned off by setting its length to zero.

Table 3-4. Physical Inventory Data Field Descriptions

Fields	Size	Type
Item Number*	16	Numeric, Right justified, Zero filled.
Item Location	8	Numeric, Right justified, Zero filled.
Item Count*	3	Numeric.
Date*	6	Date, in the form YYYYMMDD (19950928).
Time*	5	Time, in the form HH:MM, in 24 hour format 23:30.
* Required fields are identified by an asterisk next to their names.		

When data from the Physical Inventory program is transferred to the PC using procedures starting on page 27, the file is named PIFILE. Characters for each record are in strings. Each record is separated by a carriage return. Fields are padded with spaces to their defined length, but are not separated from other fields of a record by spaces or tabs.

Figure 3-3 illustrates a typical ASCII file for Physical Inventory Track.

Columns in the table and figure are shaded to make the ASCII file easy to read.

0000000036827615	CABNIT01	030	19960106	09:01
0000000069182605	DEPT0651	007	19960107	09:11
0000000031849051	CABNIT01	007	19960107	09:11
0000000036170518	CABNIT55	007	19960107	09:12
0000000003651948	CABNIT01	007	19960107	09:12
0000000031958177	CABNIT01	007	19960107	09:12
0000000061908524	CABNIT08	007	19960107	09:12
000000003319HGEM	CABNIT55	007	19960107	09:13

Figure 3-3. Typical ASCII File for Physical Inventory

4 GENERAL Apex II AND Apex-Trak PROCEDURES

The following paragraphs describe procedures that are not specific to one of the Inventory/Tracking programs. These procedures control the Apex II and guide the operator through the Apex-Trak menus.

Power the Apex II On and Off

When the Apex II is first turned on, the Compsee Introduction is displayed. The Compsee Introduction is described on page 20.

If the Apex II is turned off in the middle of procedures, the Apex II “keeps your place” in the program. The screen displayed when the Apex II is turned off is displayed when the Apex II is turned on again.

Perform the following action to turn the Apex II on:

Press the red power on/off button in the lower left corner of the Apex II (Figure 2-4).

Perform one of the following actions to turn the Apex II off:

From the main menu press the <Q> key on the Apex II. See Apex-Trak Main Menu Procedures, page 16, for navigating to and from the main menu.

OR

Press the red power on/off button in the lower left corner of the Apex II (Figure 2-4)

Note

The Apex II automatically transitions into a sleep mode after it is not used (no keys pressed) for a specified time-out period (currently set at approximately two minutes).

When the Apex II has automatically transitioned to the sleep mode, you can turn it back on by pressing the red power on/off button as described above, or by performing one of the following actions:

Press the <SCAN> key.

OR

If a scanning unit with a trigger is attached to the Apex II, press the trigger.

Adjust the Contrast Level

Perform the following procedure to adjust the contrast on the Apex II LCD screen.

To increase the contrast (make the background darker):

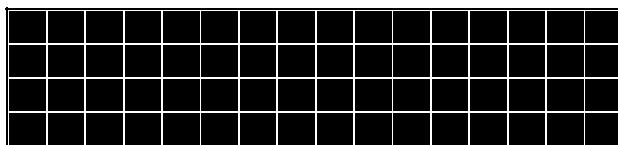
1. Press the <ALT> key. The cursor on the LCD screen is disabled (frozen).
2. Press <I> until the contrast is at the desired level. The contrast increases until the <I> key is released.

To decrease the contrast (make the text lighter):

1. Press the <ALT> key. The cursor on the LCD screen is disabled (frozen).
2. Press <J> until the contrast is at the desired level. The contrast decreases until the <J> key is released.

Alternatively, you can press <ALT> and then switch between pressing the <I> and <J> keys until the desired contrast is reached.

If the contrast is increased to the maximum, the LCD screen is so dark that you cannot see the text (as illustrated below).



If the contrast is decreased to the maximum, the text is so light that it becomes the same color as the background and you cannot see it.



Caution

If you press the <ALT> key inadvertently the cursor is disabled and the <I> and <J> keys are enabled for increasing and decreasing screen contrast.

If the Apex II is on and the screen looks blank, increase the contrast with the procedure above.

If the Apex II is on and the screen looks extremely dark as illustrated above, decrease the contrast with the procedure above.

Reboot the Apex II

This procedure is rarely performed by operators, and only when a problem cannot be mitigated in other ways.

Caution
<p>The following procedure erases all data in the Apex II. It may also erase the Apex-Trak program. Do not perform this procedure unless at least one of the following is true:</p> <ol style="list-style-type: none">1. You are an experienced programmer and are familiar with parts 1 and 3 of this manual.2. You are troubleshooting a problem and a software maintenance person tells you to reboot.3. You do not need the data stored in the Apex II and you know how to reload Apex-Trak or another executable program.

Perform the following action to reboot the Apex II, erase all data collected in all three programs, and erase the Apex-Trak program if the program has not been saved to flash.

Press and hold the <ALT> and the <•>(period) key while you turn the Apex II on by pressing the red power on key.

Perform the following action to reboot the Apex II, erase all data collected in all three programs, and erase the Apex-Trak program whether or not it has been saved to flash.

Press and hold the <ALT> and the <SPC> key while you turn the Apex II on by pressing the red power on key.

Apex-Trak Main Menu Procedures

When the Apex-Trak Main Menu is displayed, it fills three LCD screens.

- Press the arrow keys to see more of the menu.
- More of the menu is displayed with each press of the arrow keys.
- A menu option does NOT have to be displayed in order to select it.

```
=== Apex  II ===  
A)sset  Invent  
I)tem  Track  
P)hysical Invent_
```

```
=== Apex  II ===  
S)et Date & Time  
F)ree Memory  
R)ead Bar Codes
```

```
=== Apex  II ===  
C)ompsee Intro  
Q)uit= Power Off
```

Perform the following action from the Apex-Trak to access the procedure you wish to perform.

Press the first letter of the desired option and proceed to the location identified in the following table.

If You Press This Key	Proceed to Page
A	36
I	43
P	49
S	18
F	19
R	19
C	20
Q	14

Access Asset Inventory, Item Track, or Physical Inventory

Perform one of the following actions, depending on which program you wish to access from the main menu:

- Press the <A> key to access Asset Inventory (page 36).
- Press the <I> key to access Item Track (page 43).
- Press the <P> key to access Physical Inventory (page 49).

Note

The Physical Inventory program is the easiest to learn. If you are a novice, press <P>. Physical Inventory procedures are described in Chapter 7.

Navigating Through Apex-Trak Menus and Options

When navigating down the Apex-Trak menus, press the alpha key associated with your menu choice.

When navigating up the Apex-Trak program:

- Press the <Q> key if a menu is currently displayed. For example, use <Q> to display the Apex-Trak main menu when you are currently in the Asset Inventory main menu described on page 36.
- Press the <ALT> key and then the <Q> key if a data entry or non-menu option screen is currently displayed. For example, use <ALT><Q> to display the Asset Inventory menu when the Data Collection screen, described on page 37, is currently displayed.

If you press an invalid option, the Apex II beeps.

When a menu is displayed, press either one of the arrow keys to display more of the menu. For example, use the arrow keys to scroll through the main menu as described on page 16.

When a non-menu option screen is displayed, press either one of the arrow keys to move the selection indication, either a greater than symbol (>) or parentheses (), to another option.

Typical non-menu option screens are displayed on pages 39 and 52.

Using the <ALT> Key

Pressing the <ALT> key toggles between enabling and disabling the cursor on the LCD screen. Sometimes an operator may inadvertently disable the cursor by pressing <ALT>.

If the cursor on the LCD screen becomes disabled (frozen) press the <ALT> key to enable the cursor again.

In addition to being used with the <I> and <J> keys to adjust the LCD screen contrast (refer to page 15), the <ALT> key is used in programming the Apex II. Therefore, if you inadvertently press <ALT> and then other keys, you may unintentionally perform a procedure that adversely affects your Apex-Trak operations.

Refer to Part 3 of this manual for more information on how the <ALT> key is used in programming the Apex II.

It is recommended that you use the <ALT> carefully.

Set Date and Time

Perform the following procedure from the Apex-Trak main menu to set the current date and time on the Apex II.

1. Press the<S> key.

The Date and Time screen is displayed with the cursor in the year field. The currently set time is displayed.

```

Date and Time
-----
Enter New Date
1995/01/31

```

2. Press the number keys for the correct date in YYYY /MM/DD format.

Numbers are displayed as entered. After you enter the year, the cursor skips the front slash (/) and moves to the month, then to the day.

```

Date and Time
-----
Enter New Date
1996/01/31

```

If the date is correct, press <ENTER>.

A screen displays the currently set time.

```

Date and Time
-----
Enter New Time
15:53:45

```

3. Press the number keys for the correct time in 24 hour, HH:MM:SS format.

Numbers are displayed as entered. After you enter the hour, the cursor skips the colon (:) and moves to the minutes, then to seconds.

```

Date and Time
-----
Enter New Time
23:53:45

```

If the time is correct, press <ENTER>.

The Apex-Trak main menu is displayed.

View the Amount of Free Memory

Perform the following procedure from the Apex-Trak main menu to view the amount of free memory currently available for data collection on the Apex II.

1. Press the<F> key.

The free memory screen is displayed.

```
62389 Bytes
Available
Any Key Continue
```

2. If desired, note the amount of free memory for future reference. Then press any key.

The Apex-Trak main menu is displayed.

Read Bar Codes

The Apex II has the ability to scan bar codes and identify the bar code symbologies:

- | | |
|---------------------------|------------|
| a. EAN – 8 | g. Plessey |
| b. EAN – 13 | h. Code 11 |
| c. 3 of 9 | i. UPC - A |
| d. 2 of 5 (14 characters) | j. UPC - E |
| e. Codabar (5 characters) | |
| f. 128 | |

During Asset Inventory, Item Track, and Physical Inventory procedures, scanned bar codes are stored in one of three data files to be later transferred to a PC. This procedure is used to simply read and verify a bar code number and symbology.

Note

You cannot scan bar codes with the Apex II unless a scanning device is attached to it.

Perform the following procedure from the Apex-Trak main menu to scan a bar code without accessing one of the Inventory/Tracking programs.

1. Press the<R> key.

The Verify Bar Codes screen is displayed with the cursor in the first blank of the data entry field.

```
Verify Bar Codes
-----
Key to Print
ALT-Q to Quit
```

2. Press the <SCAN> button on the Apex II or press the trigger on the scanning device (if applicable).

OR

Key the bar code. Proceed to Step 3.

If you used the scanner, the Verify Bar Codes screen displays the scanned bar code number and symbology.

```
Verify Bar Codes
01234567891234
Code I (2 of 5)
ALT-Q to Quit
```

Then the Verify Bar Codes screen is displayed again.

3. If you keyed the bar code, the screen prompts you about printing the bar code

Select yes or no. Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

If you selected yes, the bar code label for the keyed bar code is printed. The Verify Bar Codes screen is again displayed.

Verify Bar Codes ----- Key to Print ALT-Q to Quit
Print Bar Code Do you wish to Print a tag? Yes (No) _
Print Bar Code Do you wish to Print a tag? (Yes) No _
Verify Bar Codes ----- Key to Print ALT-Q to Quit

Note

If a scanner is connected to the Apex II but it cannot read the scanned bar code, the

LASER BEAM ON

message is displayed on the LCD screen until the <SCAN> key or trigger on the scanning device is released.

View the Compsee Introduction

Perform the following procedure from the Apex-Trak main menu to view the COMPSEE Introduction to the Apex II, displayed on the LCD screen.

1. Press the<C> key.

The first screen in the introduction is displayed. After a moment, the next screen is automatically displayed.

COMPSEE Apex II INTRODUCTION =====

A screen displays directions for the introduction.

=SCREEN FLOW= (F1) to Pause (F4) to advance (Q) to cancel
--

2. Press <F4>. The program automatically displays the screens.

Note

<F4> advances the screen after it has been paused. Pressing <F4> during the introduction has no affect unless the screen has been paused by pressing <F1>.

3. When you are finished viewing the introduction, press <Q>.

The Apex-Trak main menu is displayed.

Apex-Trak General Procedures

Three procedures are performed identically from Asset Inventory, Item Track, and Physical Inventory main menus:

- Quit the current inventory or tracking program and display the main menu.
- Set options.
- Transfer data from the Apex II to a PC.

Table 4-1 lists and describes the Apex-Trak General Procedures.

Table 4-1. Apex-Trak General Procedures

General Operation	Description
Quit	Exits the main menu for the current program and displays the Apex II main menu.
Set options	Set Field/ Printer/Upload options; erase data, or return to the current program's main menu.
Field Options	Changes field name. If no data has been collected in the current program, the field length may also be changed.
Printer Options	Changes settings to print/not print location tags; print/not print item tags; and edit the tag headers for the current program
Upload Options	Change settings to transfer data via RS-232 directly to the PC or RS-232 via a keyboard wedge.
Erase Data File	Deletes all the data in the current program. Usually performed after a successful upload.
Quit	Exits the options menu and displays the main menu for the current program.
Transfer data	Transfers data to the PC in one of three ways: <ul style="list-style-type: none">a. With the Compsee LinkMaster Program.b. With another communications utility program, such as ProComm.c. With Compsee keyboard wedges.

Quit the Current Program

Perform this action from the Asset Inventory (AI), Item Track (IT), or Physical Inventory (PI) main menus (shown below).

Each of these menus is longer than the LCD screen. You can quit whether the Quit option is displayed or not.

Press <Q>.

The Apex II main menu is displayed.

```
=== Apex II ===  
A)sset Invent  
I)tem Track  
P)hysical Invent_
```

Set Options

The Set Options procedures are performed from all three Apex-Trak programs. All except one of the Set Options procedures are identical.

The Field option procedure involves slightly different screens depending on whether it is performed from Asset Inventory, Item Track, or Physical Inventory.

Perform this action from the Asset Inventory (AI), Item Track (IT), or Physical Inventory (PI) main menu to access Set Options procedures.

1. Press the <O> key.

The Set Options menu is displayed. The current program (in this case, the Asset) is displayed on the top line.

```
==Asset Invent==  
F)ield Options  
P)rinter Options  
U)pload Options
```

Otherwise, the three Set Options menus are identical.

```
==Asset Invent==  
E)rase Data File  
Q)uit
```

2. Select the desired option by pressing the key associated with that option. Then proceed to the page listed in the following table.

To perform this procedure	Proceed to this page
Field Options	22
Printer Options	23
Upload Options	24
Erase Data File	26
Quit to Apex II main menu	22

Quit to Current Program's Main Menu

Perform the following action from any of the Set Options menus to cancel Set Options procedures and display the current program's main menu.

1. Press the <Q> key.

Field Options

The procedure is identical for all three inventory/tracking programs; however the LCD screen displays the field names and lengths contained in the currently accessed program.

Refer to Chapter 5 for Asset Inventory, Chapter 6 for Item Track, and Chapter 7 for Physical Inventory Field Options procedures.

Printer Options

Options set with this procedure only affect the program from which they are accessed. For example, when you set Physical Inventory Printer Options, it does not affect the Asset Inventory Printer Options.

Note

When the printer option is turned on, the Apex II asks the operator, "Do you wish to Print a Tag?" when the operator keys (instead of scans) certain fields and when the operator keys or scans a number that is not already in the data file.

The Apex II displays this prompt for the following fields during data collection procedures:

Asset Inventory:
Major Division
Minor Division
Item Number

Item Track:
Destination
Item Number

Physical Inventory:
Location
Item Number

Perform the following procedure from the Set Options menu (page 22) in the program whose printing options you wish to set.

1. Press the <P> key.

The Printer Choice screen is displayed, prompting you to select the printer you are using.

```
Printer Choice
-----
>Renegade 9490
Transport P2242
```

2. Select the printer that is connected to your Apex II..

The Barcode Printing screen is displayed, prompting you to turn Location barcode tag printing on (Yes) or off (No).

```
Barcode Printing
-----
Location Tags
Yes (No) _
```

If necessary, press the arrow keys to place parentheses around Yes or No.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```
Barcode Printing
-----
Location Tags
(Yes) No _
```

3. Press <ENTER>.

The screen prompts you to turn Item barcode tag printing on (Yes) or off (No).

```
Barcode Printing
-----
Item Tags
Yes (No) _
```

4. If necessary, press the arrow keys to place parentheses around Yes or No. Then press <ENTER>.

The Header 1 screen displays the first line of the header for the current program.

```
Barcode Printing
-----
Header 1
COMPSEE, INC.---
```

5. Use the <BKSP> key to delete unwanted characters.

The character to the left of the cursor is replaced by a blank each time the <BKSP> key is pressed.

```
Barcode Printing
-----
Header   1
COMPS_
```

6. Type line 1 of the tag header as you want it to print.

Characters are displayed as keyed. If the header uses all 16 spaces, the next screen is automatically displayed.

```
Barcode Printing
-----
Header   1
YOUR COMPANY_
```

Otherwise, press <ENTER>.

The Header 2 screen displays the second line of the header for the current program.

```
Barcode Printing
-----
Header   2
Optional_
```

When the program encounters OPTIONAL, a software routine is executed to print the Field Name associated with the printed bar code. Refer to Table 3-2, Table 3-3, and Table 3-4 for names assigned to data fields when the Apex II is delivered.

7. Use the <BKSP> key to delete unwanted characters. Then type line 2 of the tag header as you want it to print.

Characters are displayed as typed. If the new line 2 tag header used all 16 spaces, the Set Options menu (page 22) is displayed.

8. If necessary, press <ENTER>.

The Set Options menu (page 22) is displayed.

Note

If the header in Step 6 is set to something other than OPTIONAL, identical headers are printed each time you print a bar code while in the current program.

For example, in Asset Inventory, the Major Division, Minor Division, and Item Number would each have identical headers.

Upload Options

This procedure is performed to change settings to transfer data from the Apex II to the PC from an RS-232 cable directly to the PC, or from an RS-232 cable via a keyboard wedge.

Perform the following procedure from the Set Options menu (page 22).

1. Press the <U> key.

The Data Upload screen is displayed.

```
Data Upload
-----
Host Connection
(RS-232) Wedge_
```


2. If necessary, press the arrow keys to place parentheses around RS-232 or Wedge.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```
Data Upload
-----
Host Connection
RS-232  (Wedge)_
```

3. Press <ENTER>.

If RS-232 is selected, the Set Options menu (page 22) is displayed and this procedure is complete.

If you select the Wedge option, the Wedge Parameters screen is displayed.

```
Wedge Parameters
-----
Auto Transmit
Yes  (No) _
```

4. If necessary, press the arrow keys to select Yes or No.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```
Wedge Parameters
-----
Auto Transmit
(Yes) No _
```

Select Yes to automatically transmit data to the keyboard wedge during the transfer procedure beginning on page 27.

Select No to manually transmit data to the keyboard wedge during the transfer procedure beginning on page 27.

Then press <ENTER>.

A data entry screen is displayed. The number of records to be transferred to the wedge in each block of transmitted data can be set from this screen.

```
Wedge Parameters
-----
Records/Block
1_
```

5. If the currently set number is not correct:

Use the <BKSP> key to delete unwanted characters and then key the desired number of records per block. Whether data is transmitted automatically or manually, the number of records set on this screen will be sent in each block until all the data in the selected data file is sent.

Characters are displayed as keyed.

If data is transmitted automatically, blocks of data are sent to the wedge automatically separated by pauses set in the following screen.

If data is transmitted manually, blocks of data are sent to the wedge when the operator is prompted to press any key on the Apex II and does so.

After entering the desired number of records per block, press <ENTER>.

A data entry screen is displayed. The software only uses data entered on this screen if Yes is selected on the Auto Transmit screen.

```
Wedge Parameters
-----
Pause Time
5_
```

- Use the <BKSP> key to delete unwanted characters and then key the desired number of seconds for the software to pause between automatically transmitting blocks of data to the wedge during transfer of data.

Characters are displayed as keyed.

Then press <ENTER>.

The first Wedge Parameters screen is again displayed. The option you selected is still selected.

```

Wedge Parameters
-----
Auto Transmit
Yes   (No)  _

```

- If all Wedge Parameter options are set as desired, press <ALT><Q>.

The settings are saved for the current program and the current program's Set Options menu is displayed.

Otherwise, continue to Step 8.

- Navigate to the screen that displays the option you want to reset. Select the desired option. Then press <ALT><Q>.

The settings are saved for the current program and the current program's Set Options menu is displayed.

Erase Data File

This procedure deletes all the data in the current program. It is usually performed only after data is successfully transferred to the PC.

Perform the following procedure from the Set Options menu (page 22).

Caution	
Do not perform this procedure unless you have no need for the data in the current program's data file and want to erase it.	

- Press the <E> key.

The Erase Data File screen is displayed.

```

Erase Data File
-----
Are you sure ?
Yes   (No)  _

```

- If necessary, press the arrow keys to place parentheses around Yes or No.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```

Erase Data File
-----
Are you sure ?
(Yes)  No  _

```

- Assure that you have the desired option selected (Yes to erase data, No to cancel this procedure). Then press <ENTER>.

The Set Options menu (page 22) is displayed. If you selected (Yes), the current data file is erased and cannot be recovered.

Transfer Data To a PC

Periodically, operators transfer data that is gathered with, and stored in, the Apex II to the PC through an RS-232 cable to a host system, either directly to an ASCII file on the PC or via a Compsee Wedge.

Before transferring data, assure that the appropriate RS-232 cable is connected to the cable port (Figure 2-4) on the Apex II.

- 0227001 9 pin cable for direct connection to PC.
- 0227004 25 pin cable for direct connection to PC.
- 0227002 Cable for connection to Compsee QuickReader auxiliary port.
- 0227003 Cable for connection to Compsee QuickLink auxiliary port.

In addition, assure that the upload option on the Apex II (page 24) is set to the desired mode of transfer: RS-232 or RS-232 via a keyboard wedge.

Data Upload

Host Connection
(RS-232) Wedge_

If you are transferring data via a Communications Utility Program other than LinkMaster, perform the procedure beginning on page 27.

If you are transferring data via LinkMaster, perform the procedure beginning on page 28.

If you are transferring data via a Wedge, perform the following procedure.

Transfer Data To a PC Via a Wedge

Perform the following procedure from the Apex-Trak main menu.

1. Select A) sset Invent, D) tem Track, or P) hysical Invent.

The associated menu is displayed.

Press <T>.

The Wedge Upload screen is displayed. Refer to the Compsee QuickLink or QuickReader Wedge Manual for procedures.

Wedge Upload

Waiting on Wedge
A to Abort..._

NOTES:

- a. Apex-Trak transfers data to a wedge in blocks of records. Whether data is transmitted automatically or manually, the number of records transferred to the wedge in each block can be set using the Upload Options procedure described on page 24.
- b. If data is transmitted automatically, blocks of data are sent to the wedge automatically separated by pauses using the Upload Options procedure described on page 24.
- c. If data is transmitted manually, blocks of data are sent to the wedge when the operator is prompted to press any key on the Apex II and does so.

Transfer Data To a PC Via a Communications Utility Program Other Than LinkMaster

Perform the following procedure on the PC and the Apex II.

1. If necessary, launch the communications utility to be used with Apex-Trak.
2. Assure the communications utility is ready for data transfer. Follow the procedures in the associated manual.
3. Check the setup of the communications utility program to assure that the computer port selected on the PC is the same port that the cable coming from the Apex II is physically connected to.
4. From the Apex II Apex-Trak main menu, select A) sset Invent, I) tem Track, or P) hysical Invent.

The associated menu is displayed.

Press <T>.

The RS-232 Upload screen is display-ed, prompting you to run LinkMaster or another communications utility.

```
==RS-232 Upload==  
LinkMstr=Run now  
Other Prgm=Press  
Any Key      Q)uit
```

5. Assure the communications utility is ready for data transfer. Then press any key on the Apex II.
6. The Erase Data File screen is displayed.

```
Erase Data File  
Did ALL the Data  
Transfer ?  
Yes      (No)      _
```

7. Leave the Erase Data File screen displayed for now. Follow the procedures in the communications utility manual.

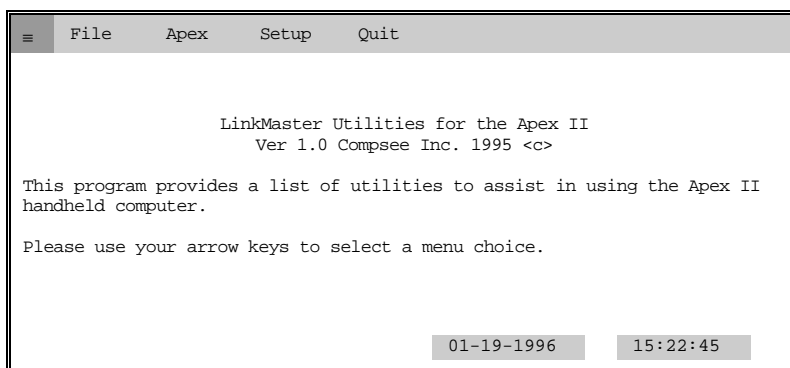
When you are sure the data successfully transferred the data to the PC and no longer need it on the Apex II, select Yes on the Apex II Erase Data File screen. Otherwise, select no. The data can be erased later using the procedure on page 26.

Transfer Data To a PC Via LinkMaster

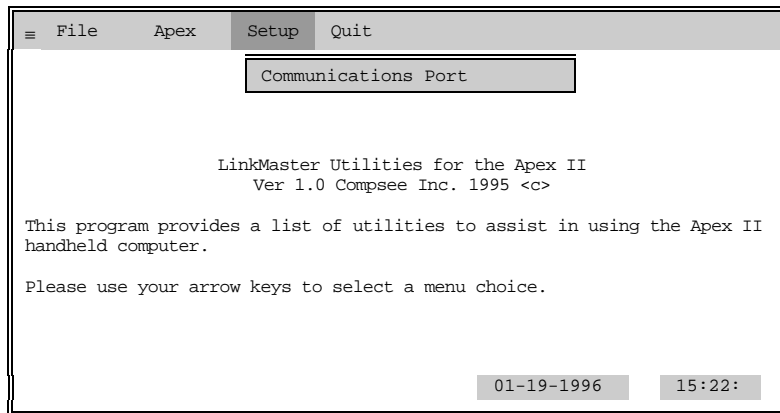
Perform the following procedure on the PC and the Apex II.

1. Run the LinkMaster program on the PC.

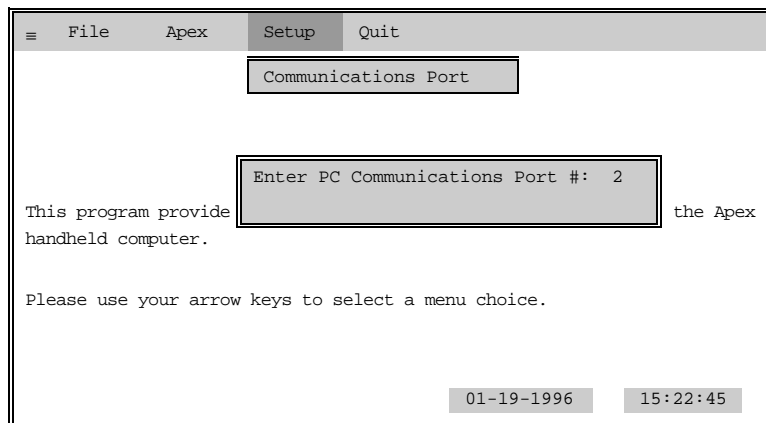
If necessary, install [Linkmstr.exe]. To launch the LinkMaster program, type LinkMstr at the DOS prompt or run the program from Windows[®]. The LinkMaster main menu (below) is displayed.



2. In LinkMaster, use the arrow keys to select the Setup main menu option. The Communications Port option is displayed (below).



3. Select the Communications Port option. A status box (below) is displayed. If your computer has more than one port, a cursor is displayed at the port number on the screen.

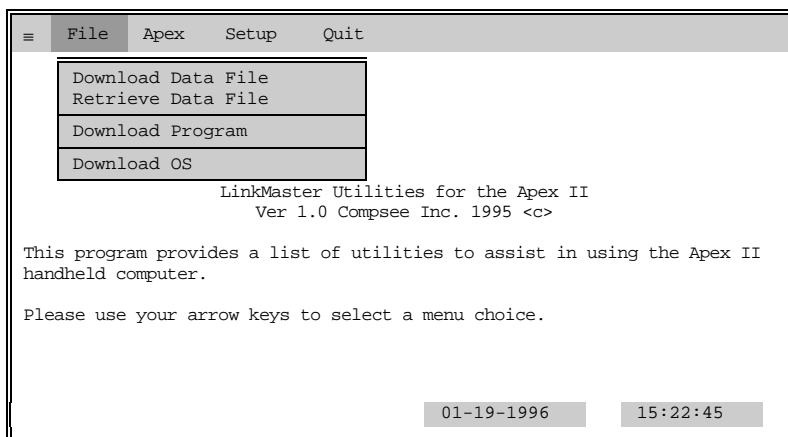


4. If necessary, update the port number. Then press the <ENTER> key on the PC.

The status box is removed.

5. Use the arrow keys to select the File option.

The File options menu (below) is displayed.



6. From the Apex II Apex-Trak main menu, select A)sset Invent, I)tem Track, or P)hysical Invent.

The associated menu is displayed.

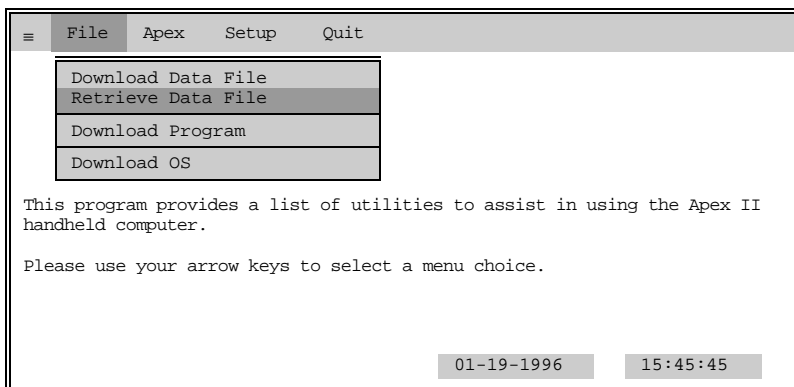
Press <T>.

The RS-232 Upload screen is displayed, prompting you to run LinkMaster or press any key.

```
==RS-232 Upload==  
LinkMstr=Run now  
Other Prgm=Press  
Any Key Q)uit
```

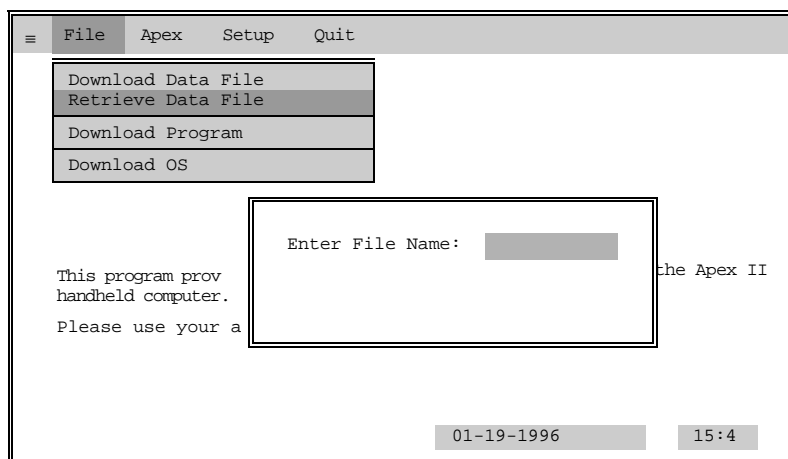
7. Use the down arrow key to select Retrieve Data File.

The Retrieve Data File option is highlighted.



8. Press <Enter> on the PC keyboard.

A dialog is displayed, prompting you to type the desired data file name via the PC keyboard.



9. Type one of the three following filenames, depending on which data file you are transferring.

AIFILE	To upload Asset Inventory data
ITFILE	To upload Item Track data
PIFILE	To upload Physical Inventory data

10. Press <ENTER> on the PC keyboard.

The data is retrieved from the Apex II and an ASCII file is created in the current directory on the PC.

Once data has been copied to the PC, the operator may import it into any spreadsheet, report generator, or other computer software application that supports the import of ASCII data.

Other LinkMaster Procedures

The LinkMaster software includes other options. These options are described in Part 1 of this manual.

An operator may need to perform the Download Program option when:

- A new version of the program is sent to the operator.
- During troubleshooting procedures when the Apex II has been rebooted.

Caution

The following procedure erases all data in the Apex II. It may also erase the Apex-Trak program. Do not perform this procedure unless at least one of the following is true:

- You are an experienced programmer and are familiar with parts 1 and 3 of this manual.
- You are troubleshooting a problem and a software maintenance person tells you to reboot and download the program.

In order to download a program, the Apex II must be in the immediate mode, described in Parts 1 and 3 of this manual.

The easiest way to prepare the Apex II to receive a program is to reboot the Apex II with the following procedure.

Turn the Apex II off. Then press and hold <ALT><. > keys while turning on the Apex II. The screen displays a SYSTEM REBOOT message.

Then the Compsee logo screen indicates the Apex II is ready to receive a program.

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_128K

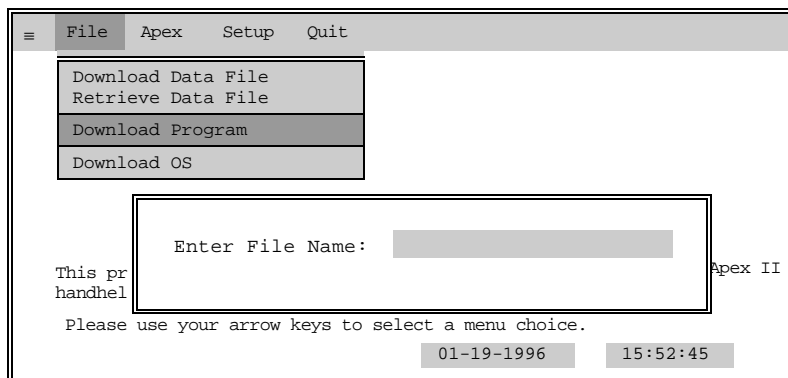
To Download the Apex-Trak program, perform the following procedure on the PC and the Apex II.

1. Connect your Apex II terminal into your PC's serial port using the Compsee cable 0227001 356. Assure that cable coming from the Apex II is physically connected to the computer port selected on the PC LinkMaster program. Page 29 describes the port selection procedure.
2. Assure that the Apex II MODE is set at 5,3. Part 1, Section 2 of this manual describes the MODE keyboard command.
3. Run the LinkMaster program on the PC.

If necessary, install [Linkmstr.exe] from the diskette you received with the Apex II. To launch the LinkMaster program, type LinkMstr at the DOS prompt or run the program from Windows[®]. The LinkMaster main menu is displayed.

4. Use the arrow keys to select the File menu option. Select the Download Program option. Then press <ENTER>.

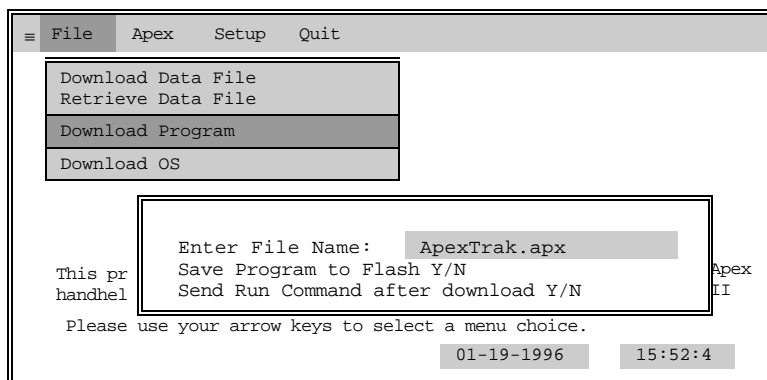
A dialog (below), prompts you to type the program file name.



5. Type ApexTrak.apx (with no hyphen or space) in the data entry field. (The field is not case sensitive).

Note

If you have ordered a custom program, the file name may be different. If necessary, obtain the file name from appropriate personnel.



6. Press <ENTER>.
7. A prompt asks if you want to save the program to flash (instead of leaving it in RAM).
8. Unless you have been directed otherwise, Select Y and press <ENTER>.

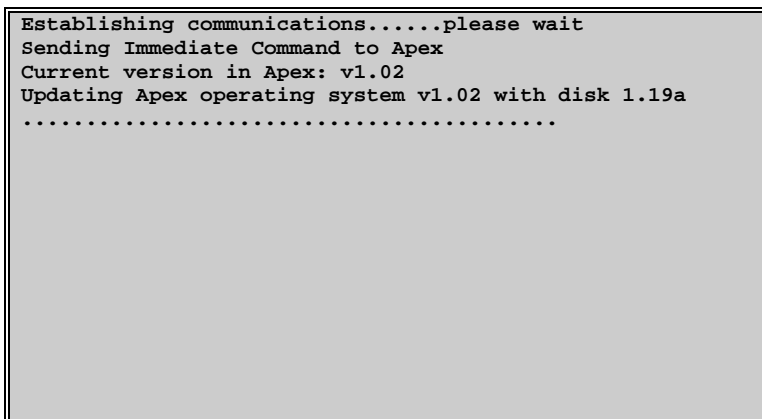
A prompt asks if you want to send the Run Command (starting Apex-Trak) after the program has been downloaded.

9. Unless you have been directed otherwise, Select Y and press <ENTER>.

The download program checks the Apex II operating system.

If your operating system matches the operating system in the download program, LinkMaster starts downloading the program as described on the following page.

If the download program has a later version of the Apex II operating system, it downloads the new operating system (OS). Processing messages and indications are displayed on the PC.



A message is displayed on the Apex II while the new operating system is being downloaded.

```
Loading OS
_
```

After checking the operating system, the download program erases any data that has been saved to flash. A message is displayed on the Apex II.

```
Rewriting Flash
_
```

When this is completed, LinkMaster starts downloading the program. On the fourth line, the PC screen displays dots, one by one, until they fill the line. Then the line is cleared, and the cycle repeats itself. This processing indication continues until downloading is complete.

```
Establishing communications.....please wait
Sending Immediate Command to Apex
Current version in Apex: v1.02
Updating Apex operating system v1.02 with disk 1.19a
Loading Apex-BASIC program [ApexTrak.apx]....please wait.
.....
```

If your operating system matches the operating system in the download program, the screen displays different processing messages.

```
Establishing communications.....please wait
Sending Immediate Command to Apex
Current version in Apex: v1.19a
Apex Operating system matches disk 1.19a
Loading Apex-BASIC program [ApexTrak.apx]....please wait.
.....
```

If you selected the “Save Program to FLASH” and the “Send Run Command after download” options in Step 8 and 9, LinkMaster displays processing indications on the PC screen.

```
Establishing communications.....please wait
Sending Immediate Command to Apex
Current version in Apex: v1.19a
Apex Operating system matches disk 1.19a
Loading Apex-BASIC program [ApexTrak.apx]....please wait.

.....
Sending the SAVE command to the Apex terminal
Sending the RUN command to the Apex terminal
```

When the Run Command has been sent, the bottom of the PC indicates the download procedure is complete, and you may quit out of LinkMaster on the PC.

```
Establishing communications.....please wait
Sending Immediate Command to Apex
Current version in Apex: v1.19a
Apex Operating system matches disk 1.19a
Loading Apex-BASIC program [ApexTrak.apx]....please wait.

.....
Sending the SAVE command to the Apex terminal
Sending the RUN command to the Apex terminal

                For updates to this program
                contact your reseller or call
                the Compsee technical support
                BBS at 910-439-1332

PRESS ANY KEY TO CONTINUE..
```

During the program download, the Apex II screen displays a status message.

```
Loading Program
ApexTrak
```

If you selected the “Save Program to FLASH” option in Step 8, the Apex II displays a processing message.

```
Saving Program
To FLASH
```

A message is briefly displayed.

```
SYSTEM SETUP. . .
```

If you selected the “Send Run Command, after download” command, Apex-Trak is launched and the Compsee Introduction begins.

```
COMPSEE
Apex II
INTRODUCTION
=====
```

Note

If you did not select the “Send Run Command, after download” option, the cursor is displayed in the top left corner of the blank screen.

```
—
```

Press <ALT> <R>. Apex-Trak is launched. The Apex II briefly displays the SYSTEM SETUP. . .message, and then the INTRODUCTION screen.

The screen automatically advances to the introduction menu, which explains how to navigate through the introduction.

```
==SCREEN FLOW==
(F1) to Pause
(F4) to advance
(Q) to cancel
```

Press <Q> to display the main menu.

```
=== Apex II ===
A) sset Invent
I) tem Track
P) hysical Invent_
```

5 ASSET INVENTORY PROCEDURES

Asset Inventory Procedures begin when you select <A> from the Apex-Trak main menu (page 16).

- Press arrow keys to see more of the menu. More of the menu is displayed with each press of the arrow keys.
- A menu option does NOT have to be displayed in order to select it.

```
== Asset Invent ==
C) ollect Data
V) iew and Edit
T) ransfer Data
```

```
== Asset Invent ==
O) ptions
Q) uit
```

Perform the following action from the Asset Inventory menu to access the procedure you wish to perform.

Press the first letter of the desired option and proceed to the location identified in the following table.

If You Press This Key	Proceed to
C	Page 37
V	Page 39
T	Page 40
O	Page 40
Q	The following paragraph

Quit To Main Menu

Perform the following action after completing Asset Inventory procedures, or to cancel Asset Inventory procedures before beginning them.

Press <Q>.
The Apex-Trak main menu is displayed.

Collect Asset Inventory Data

This procedure records the major physical or control division, the minor division, item number, description, remarks, and condition for each item (piece of equipment, furniture, appliance, etc.) during inventory.

If you are using a printer and want to print bar codes for locations or item numbers, turn these options on (see page 23). Otherwise, turn the printing options off (see page 23).

The following procedure is for when the printing options (page 23) are turned off.

Note

To move to the previous data collection screen, press the <ALT> key and then press the up arrow key.

1. From the Asset Inventory menu, press <C>.

The Data Collection screen is displayed.

```
Data Collection
Key or Scan the
Major Division
-----
```

2. Key or scan the Major Division for the inventory.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Major Division
DIV 215_
```

Otherwise, press <ENTER>.

The screen prompts you for the Minor Division for the inventory.

```
Data Collection
Key or Scan the
Minor Division
-----
```

3. Key or scan the Minor Division.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

Otherwise, press <ENTER>.

The screen prompts you for the first item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

4. Key or scan the number printed on the control tag of one of the items to be inventoried.

Characters are displayed as entered. If the item number uses 16 characters, the next screen is automatically displayed.

Otherwise, press <ENTER>.

The screen prompts you to key a description of the item number entered in Step 4.

```
Data Collection
Key or Scan the
Item Number
9 339 09196_____
```

```
Data Collection
Key or Scan the
Description
-----
```

5. Key the description or press <ENTER>.

The screen prompts you to key remarks for the item number entered in Step 4.

```
Data Collection
Key or Scan the
Remarks
-----
```

6. Key the remarks or press <ENTER>.

The screen prompts you to key the condition for the item number entered in Step 4.

```
Data Collection
Key or Scan the
Condition
-----
```

7. Key the condition or press <ENTER>.

The screen prompts you for the next item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

8. Repeat Steps 4 through 7 for all the assets to be inventoried. Then press <ALT><Q>.

The Asset Inventory menu is displayed.

NOTES

- a. If you are a novice and have difficulty with this procedure, perform procedures in Chapter 7 first. Physical Inventory procedures are more simple and they are described in detail for the novice.
- b. In Steps 4, if you enter a number that is already in the database, a message is displayed.

```
Error Error
Duplicate
Item Number
Press any key..
```

Apex-Trak does not allow you to enter duplicate Item Numbers in Asset Inventory. After you press any key, the procedure continues as above.

- c. In Steps 2, 3, and 4 if printing options are turned on and you scan a number that is not already in the database or key a number, a prompt is displayed.

```
Print Barcode
Do you wish to
Print a Tag ?
(Yes) No _
```

After you select yes or no, the procedure continues as above.

View And Edit Inventory Data

This procedure displays an item number that has already been entered and its description, remarks, and condition.

The description, remarks, and condition fields may be edited. Since the Item Number is unique, it cannot be edited once it has been entered.

1. From the Asset Inventory menu, press <V>.

The View and Edit screen prompts you to enter the desired Item Number.

```
View and Edit
Key or Scan the
Item Number
-----
```

2. Key or scan the number for the item to be viewed.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

```
View and Edit
Key or Scan the
Item Number
7539786-----
```

Otherwise, press <ENTER>.

The screen displays a list of the current names of the Item Track data fields. The list does not fit on the screen.

```
View and Edit
Select Field
>Description
Computer
```

3. Use the arrow keys to display more of the list.

With each press of the arrow keys, the >symbol shifts down the list to indicate the selected field name or field data.

```
View and Edit
Select Field
Description
>Computer
```

Field data is listed below the field name.

```
View and Edit
Select Field
Computer
>Remarks
```

In this example, Asset number 7539786 has a description of "Computer," remarks stating "Model 978333," and a condition of "New."

```
View and Edit
Select Field
Remarks
>Model 978333_
```

```
View and Edit
Select Field
Model 978333_
>Condition
```

```
View and Edit
Select Field
Condition
>New
```

```
View and Edit
Select Field
>Description
Computer
```

When the end of the list has been reached, the beginning of the list is again displayed.

4. When the field name or the actual data to be changed is selected (> is in front of the name or actual field), press <ENTER>.

A data entry screen is displayed for the selected data.

```
View and Edit
-----
Description
Computer_____
```

5. Use the <BKSP> key to delete unwanted characters.

The character to the left of the cursor is replaced by a blank each time the <BKSP> key is pressed.

```
View and Edit
-----
Description
Com_____
```

6. Type the desired data.

Characters are displayed as entered. If the data uses the maximum characters and spaces allowed, editing is completed and the beginning screen is automatically displayed.

Otherwise, press <ENTER>.

The beginning screen is displayed.

```
View and Edit
Select Field
>Description
Computer
```

7. Repeat Steps 3 through 6 until all desired fields are updated. Then press <ALT><Q>.

Transfer Asset Inventory (AIfile) Data

Follow procedures beginning on page 27 to transfer Physical Inventory data to the PC.

Set Options

When options are changed in Asset Inventory, Item Track and Physical Inventory options are not affected.

Follow procedures beginning on page 22 to set all options except field options.

Perform the following procedure to set the Name and length for Asset Inventory data fields.

Note

The length of a data field cannot be changed if Asset Inventory data has been collected and is still in the data file.

1. From the Asset Inventory menu, press <O>.

The Asset Inventory options menu is displayed.

```
==Asset Invent==  
F)ield Options  
P)rinter Options  
U)pload Options_
```

2. Press <F>.

The screen displays a list of the current names of the Asset Inventory data fields. The list does not fit on the screen.

```
Field Settings  
-----  
>Major Division  
Minor Division
```

3. Use the arrow keys to display more of the list.

With each press of the arrow keys, the “greater than” symbol (>) shifts down the list to indicate the selected field name.

```
Field Settings  
-----  
Major Division  
>Minor Division
```

```
Field Settings  
-----  
Minor Division  
>Item Number
```

```
Field Settings  
-----  
Item Number  
>Description
```

```
Field Settings  
-----  
Description  
>Remarks
```

```
Field Settings  
-----  
Remarks  
>Condition
```

When the end of the list has been reached, the beginning of the list is again displayed.

```
Field Settings  
-----  
>Major Division  
Minor Division
```

4. When the field name to be changed is selected (> is in front of the name), press <ENTER>.

A data entry screen is displayed for the selected data field name.

```
Field Settings  
-----  
Field Name  
Major Division_
```

5. Use the <BKSP> key to delete unwanted characters.

The character to the left of the cursor is replaced by a blank each time the <BKSP> key is pressed.

```
Field Settings  
-----  
Field Name  
Maj_____
```

6. Type the desired field name.

Characters are displayed as entered. If the field name uses the maximum allowed (15 characters), the next screen is automatically displayed.

```
Field Settings
-----
Field Name
BUILDING_____
```

Otherwise, press <ENTER>.

If inventory data has been collected, the screen displays a warning.

```
Warning Warning
Data Collected.
No Length Change
Press any key.._
```

If no data is in the Item Track data file, a data entry screen is displayed with the selected data field's current length displayed.

```
Field Settings
-----
Field Length
16_
```

7. If you receive a warning message in Step 6, press<ENTER> and skip to Step 9. Otherwise continue procedures in Step 8.
8. Use the <BKSP> and number keys to enter the desired field length. This is the desired length for the data field, not the field name.

Characters are displayed as entered. If the field name uses the maximum allowed (2 characters), the next screen is automatically displayed.

```
Field Settings
-----
Field Length
9_
```

Otherwise, press <ENTER>.

The beginning Field Settings screen is displayed again (See Step 2). This time, the new field name is displayed in capital letters.

```
Field Settings
-----
>BUILDING
Minor Division
```

9. If desired, repeat Steps 2 through 8 to update additional field data. Otherwise continue to Step 10.
10. Press <ALT><Q>.

The Asset Inventory Set Options menu is displayed.

```
===Item Track===
F)ield Options
P)rinter Options
U)pload Options
```

6 *ITEM TRACK PROCEDURES*

Item Track Procedures begin when you select <I> from the Apex-Trak main menu (page 16).

- Press the arrow keys to see more of the menu. More of the menu is displayed with each press of the arrow keys.

```
===Item  Track===  
I)ssue  
R)eturn  
S)tock      _
```

- A menu option does NOT have to be displayed in order to select it.

```
===Item  Track===  
T)ransfer Data  
O)ptions  
Q)uit      _
```

In Item Track, data collection consists of recording the following events:

- a. Issuing an item (page 44).
- b. Returning an Item (page 45).
- c. Stocking an Item (page 46).

Perform the following action from the Item Track menu to access the procedure you wish to perform.

Press the first letter of the desired option and proceed to the location identified in the following table.

If You Press This Key	Proceed to
I	Page 44
R	Page 45
S	Page 46
T	Page 47
O	Page 47
Q	The following paragraph

Note

During data collection (Issue, Return, or Stock an item), c data collection screen, press the <ALT> key and then press the up arrow key.

Quit To Main Menu

Perform the following action after completing Physical Inventory procedures, or to cancel Physical Inventory procedures before beginning them.

Press <Q>.
The Apex-Trak main menu is displayed.

Issue Item

This procedure records the destination, item number, number of days checked out, and a movement code of "I" for each item (tool, merchandise, etc.) being tracked. If you are not using a printer, turn the printing options off (see page 23).

If you are using a printer and want to print bar codes for locations or item numbers, turn these options on (see page 23). Otherwise, turn the printing options off.

The following procedure is for when the printing options (see page 23) are turned off.

1. From the Item Track menu, press <I>.

The Issue screen is displayed with the Destination prompt.

```
      Issue
Key or Scan the
Destination
-----
```

2. Key or scan the destination checking out the item.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

```
      Issue
Key or Scan the
Destination
DEPT06__
```

Otherwise, press <ENTER>.

The screen prompts you for the first item number issued to the destination entered in Step 2.

```
      Issue
Key or Scan the
Item Number
-----
```

3. Key or scan the number printed on the tag of the item being issued.

Characters are displayed as entered. If the item number uses 8 characters, the next screen is automatically displayed.

```
      Issue
Key or Scan the
Item Number
9783954_
```

Otherwise, press <ENTER>.

A prompt asks for the number of days until the item issued in Step 3 must be returned by the destination entered in Step 2.

```
      Issue
Key or Scan the
Return Days
---
```

4. Key the number of days the item is checked out for (0 - 999). Then press <ENTER>.

Apex-Trak automatically enters a movement code of "I" for this item.

The screen prompts you for the next item number issued to the destination entered in Step 2.

```
      Issue
Key or Scan the
Item Number
-----
```

5. Repeat Steps 3 and 4 until all the items issued to the destination in Step 2 have been keyed or scanned. Then press <ALT><Q>.

The Item Track menu is displayed.

NOTES

- a. If you are a novice and have difficulty with this procedure, perform procedures in Chapter 7 first. Physical Inventory procedures are more simple and they are described in detail for the novice.
- b. In Steps 3, if you enter a number that is already in the database, identified as issued, a message is displayed.

```
Already Issued
from Stock to
Destination
Press any key..
```

Apex-Trak does not allow you to issue an item that the data base in the Apex II lists as already issued to a destination. After you press any key, the procedure continues as above.

- c. In Steps 2 and 3, if printing options are turned on and you scan a number that is not already in the database or key a number, a prompt is displayed.

```
Print Barcode
Do you wish to
Print a Tag ?
(Yes) No _
```

After you select yes or no, the procedure continues as above.

Return Item

This procedure records the item number and a movement code of "R" for each item (tool, merchandise, etc.) being tracked. If you are not using a printer, turn the printing options off (see page 23).

If you are using a printer and want to print bar codes for locations or item numbers, turn these options on (see page 23). Otherwise, turn the printing options off.

The following procedure is for when the printing options (see page 23) are turned off.

1. From the Item Track menu, press <R>.

The Return screen prompts you for the Item Number.

```
Return
Key or Scan the
Item Number
-----
```

2. Key or scan the number printed on the tag of the item being returned.

Characters are displayed as entered. If the item number uses 8 characters, the next screen is automatically displayed.

```
Issue
Key or Scan the
Item Number
9783954_
```

Otherwise, press <ENTER>.

The Return screen prompts you for the Item Number of the next item being returned.

```
Return
Key or Scan the
Item Number
-----
```

3. Repeat Step 2 until all returned item numbers have been keyed or scanned. Then press <ALT><Q>.

The Item Track menu is displayed.

NOTES

- a. In Step 2, if you enter a number that is already in the database and is identified as returned in the database, a message is displayed.

```
Already Returned
Press any key.._
```

- b. In Step 2, if the printing options are turned on and you enter a number that is not already in the database, a prompt is displayed.

```
Print Barcode
Do you wish to
Print a Tag ?
(Yes) No _
```

After you select yes or no, the procedure continues as above.

Stock Item

This procedure records the item number, stock location, and a movement code of “S” for each item (tool, merchandise, etc.) being tracked. If you are not using a printer, turn the printing options off (see page 23).

If you are using a printer and want to print bar codes for item numbers, turn these options on (see page 23). Otherwise, turn the printing options off.

The following procedure is for when the printing options (see page 23) are turned off.

1. From the Item Track menu, press <S>.

The ReStock screen prompts you for the Item Number.

```
ReStock
Key or Scan the
Item Number
-----
```

2. Key or scan the number printed on the tag of the item being stocked (or restocked).

Characters are displayed as entered. If the item number uses 8 characters, the next screen is automatically displayed.

```
ReStock
Key or Scan the
Item Number
9783954_
```

Otherwise, press <ENTER>.

The screen prompts you for the stock location where the item is being put away.

```
ReStock
Key or Scan the
Location
-----
```

3. Key or scan the stock location.

Characters are displayed as entered. If the item number uses 8 characters, the next screen is automatically displayed.

Otherwise, press <ENTER>.

The ReStock screen prompts you for the Item Number of the next item being put away in stock.

```
ReStock
Key or Scan the
Item Number
-----
```

4. Repeat Steps 2 and 3 until all items being stocked or restocked and their locations have been entered into the data file. Then press <ALT><Q>.

The Item Track menu is displayed.

NOTES

- a. In Step 2, if you enter a number that is already in the database and is identified as returned in the database, a message is displayed.

```
Already Returned  
to Stock.  
  
Press any key..
```

After you press any key, the procedure continues as above.

- b. In Step 2, if the printing options are turned on and you enter a number that is not already in the database, a prompt is displayed.

```
Print Barcode  
Do you wish to  
Print a Tag ?  
(Yes) No _
```

After you select yes or no, the procedure continues as above.

Transfer Item Track (ITFILE) Data

Follow procedures beginning on page 27 to transfer Physical Inventory data to the PC.

Set Options

When options are changed in Item Track, Asset Inventory and Physical Inventory options are not affected.

Follow procedures beginning on page 22 to set all options except field options.

Perform the following procedure to set the Name and length for Item Track data fields.

Note

The length of a data field cannot be changed if Item Track data has been collected and is still in the data file.

1. From the Item Track menu, press <O>.

The Item Track options menu is displayed.

```
===Item Track===  
F)ield Options  
P)rinter Options  
U)pload Options_
```

2. Press <F>.

The screen displays a list of the current names of the Item Track data fields. The list does not fit on the screen.

```
Field Settings  
-----  
>Item Number  
Destination
```

3. Use the arrow keys to display more of the list.

With each press of the arrow keys, the >symbol shifts down the list to indicate the selected field name.

```
Field Settings  
-----  
Item Number  
>Destination
```

```

Field Settings
-----
Destination
>Return Days

```

```

Field Settings
-----
Return Days
>Movement Code

```

When the end of the list has been reached, the beginning of the list is again displayed.

```

Field Settings
-----
>Item Number
Destination

```

4. When the field name to be changed is selected (> is in front of the name), press <ENTER>.

A data entry screen is displayed for the selected data field name.

```

Field Settings
-----
Field Name
Destination____

```

5. Use the <BKSP> key to delete unwanted characters.

The character to the left of the cursor is replaced by a blank each time the <BKSP> key is pressed.

```

Field Settings
-----
Field Name
Destin_____

```

6. Type the desired field name.

Characters are displayed as entered. If the field name uses the maximum allowed (15 characters), the next screen is automatically displayed.

```

Field Settings
-----
Field Name
DEST DEPARTMENT

```

Otherwise, press <ENTER>.

If inventory data has been collected, the screen displays a warning.

```

Warning Warning
Data Collected.
No Length Change
Press any key.._

```

If no data is in the Item Track data file, a data entry screen is displayed with the selected data field's current length displayed.

```

Field Settings
-----
Field Length
8_

```

7. If you receive a warning message in Step 6, press<ENTER> and skip to Step 9. Otherwise continue procedures in Step 8.
8. Use the <BKSP> and number keys to enter the desired field length. This is the desired length for the data field, not the field name.

Characters are displayed as entered. If the field name uses the maximum allowed (2 characters), the next screen is automatically displayed.

```

Field Settings
-----
Field Length
9_

```


Otherwise, press <ENTER>.

The beginning Field Settings screen is displayed again (See Step 2). This time, the new field name is displayed in capital letters.

```
Field Settings
-----
>Item Number
  DEST DEPARTMENT
```

9. If desired, repeat Steps 2 through 8 to update additional field data. Otherwise continue to Step 10.

10. Press <ALT><Q>.

The Item Track Set Options menu is displayed.

```
===Item Track===
F)ield Options
P)rinter Options
U)pload Options
```

11. Press the letter for one of the Item Track options. (Press <Q> to display the Physical Inventory main menu.)

NOTES

1. When you change the name of a data field, it is displayed on the Apex II in capital letters.
3. The greater than symbol moves in one of two slightly different patterns through the list, depending on which arrow key you press. Use the arrow key you prefer.

7 PHYSICAL INVENTORY PROCEDURES

Physical Inventory Procedures begin when you select <P> from the Apex-Trak main menu (page 16).

- Press the arrow keys to see more of the menu. More of the menu is displayed with each press of the arrow keys.
- A menu option does NOT have to be displayed in order to select it.

```
===Phy Invent===
C)ollect Data
T)ransfer Data
O)ptions
```

```
===Phy Invent===
Q)uit
```

Perform the following action from the Physical Inventory menu to access the procedure you wish to perform.

Press the first letter of the desired option and proceed to the location identified in the following table.

If You Press This Key	Proceed to
C	Page 50
T	Page 54
O	Page 54
Q	The following paragraph

Quit To Main Menu

Perform the following action after completing Physical Inventory procedures, or to cancel Physical Inventory procedures before beginning them.

Press <Q>.

The Apex-Trak main menu is displayed.

Collect Data

This procedure records the location, item number and count for each component (tool, merchandise, etc.) during an inventory.

If you are using a printer and want to print bar codes for locations or item numbers, turn these options on (see page 23). Otherwise, turn the printing options off (see page 23).

The following procedure is for when the printing options (page 23) are turned off.

Note

To move to the previous data collection screen, press the <ALT> key and then press the up arrow key.

1. From the Physical Inventory menu, press <C>.

The Data Collection screen is displayed.

```
Data Collection
Key or Scan the
Location
-----
```

2. Key or scan the location for the inventory.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Location
BLDG 215
```

Otherwise, press <ENTER>.

The screen prompts you for the first item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

3. Key or scan the number printed on the control tag of one of the items to be inventoried.

Characters are displayed as entered. If the item number uses 16 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Item Number
A 729 HD196_
```

Otherwise, press <ENTER>.

The screen prompts you for the count of the item you entered.

```
Data Collection
Key or Scan the
Count
---
```

4. Count the number of pieces of this item that are in stock. Then key the number. (The Apex II allows you to enter a zero in this field if you are out of stock.)

Numbers are displayed as entered. If the count uses 3 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Count
8__
```

Otherwise, press <ENTER>.

The screen prompts you for the next item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

5. Repeat Steps 2, 3, and 4 with the next item.
6. Repeat Step 5 until all items in this location have been inventoried. Then press <ALT><Q>.

The Physical Inventory menu is displayed.

```
===Phy Invent===
C)ollect Data
T)ransfer Data
O)ptions
```

To inventory items in another location, press <C>.

To transfer physical inventory data to the PC, press <T> and follow procedures starting on page 54.

To update Physical Inventory Options, press <O> and follow procedures starting on page 54.

To leave Physical Inventory and display the Apex-Trak main menu, press <Q>.

NOTES

- a. If an item number is already in the data file when you key it, the ReCount screen is displayed.

Recount the pieces of this item and re-key the count or press <ENTER>.

```
ReCount
Key New Qty for
0000000002794713
8__
```

- b. If you are performing inventory in one location only, or if the physical location of inventory is unimportant to you, then turn off the location field by following the procedure beginning on page 54.

The following procedure is for when the location field is set to zero and the printer options are turned off. In this example, the Apex II does not prompt you for the location number. Otherwise, the procedure is identical to the one described above.

1. From the Physical Inventory menu, press <C>.

The screen prompts you for the first item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

2. Key or scan the number printed on the control tag of one of the items to be inventoried.

Characters are displayed as entered. If the item number uses 16 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Item Number
A 729 HD196_____
```

Otherwise, press <ENTER>.

The screen prompts you for the count of the item you entered.

```
Data Collection
Key or Scan the
Count
----
```

- Count the number of pieces of this item that are in stock. Then key the number. (The Apex II allows you to enter a zero in this field if you are out of stock.)

Numbers are displayed as entered. If the count uses 3 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Count
8---
```

Otherwise, press <ENTER>.

The screen prompts you for the next item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

- Repeat Steps 1, 2, and 3 with the next item.
- Repeat Step 4 until all items in this location have been inventoried. Then press <ALT><Q>.

The Physical Inventory menu is displayed.

```
===Phy Invent===
C)ollect Data
T)ransfer Data
O)ptions
```

The following procedure is for when the printing options are turned on and a printer is attached to the Apex II.

In this example, you scan a location number that is not in the data file and key the Item number.

- From the Physical Inventory menu, press <C>.

The Data Collection screen is displayed.

```
Data Collection
Key or Scan the
Location
-----
```

- Key or scan the location for the inventory.

Characters are displayed as entered. If the location uses 8 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Location
BLDG 215
```

Otherwise, press <ENTER>.

The screen prompts you to print a barcode for the location or to cancel barcode printing.

```
Print Barcode
Do you wish to
Print a Tag ?
Yes (No) _
```

- If necessary, press the arrow keys to place parentheses around Yes or No. Then press <ENTER>.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```
Print Barcode
Do you wish to
Print a Tag ?
(Yes) No _
```

When <ENTER> is pressed, the next screen is displayed. If you selected Yes, a location barcode is printed. Attach the barcode per your organization's procedures.

The screen prompts you for the first item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

4. Key or scan the number printed on the control tag of one of the items to be inventoried.

Characters are displayed as entered. If the item number uses 16 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Item Number
A 729 HD196-----
```

Otherwise, press <ENTER>.

The screen prompts you to print a barcode for the item number or to cancel barcode printing.

```
Print Barcode
Do you wish to
Print a Tag ?
Yes (No) _
```

5. If necessary, press the arrow keys to place parentheses around Yes or No. Then press <ENTER>.

Parentheses toggle between being displayed around Yes and No as the arrow keys are pressed.

```
Print Barcode
Do you wish to
Print a Tag ?
(Yes) No _
```

When <ENTER> is pressed, the next screen is displayed. If you selected Yes, an item number barcode is printed. Attach the barcode per your organization's procedures.

The screen prompts you for the count of the item you entered.

```
Data Collection
Key or Scan the
Count
---
```

6. Count the number of pieces of this item that are in stock. Then key the number. (The Apex II allows you to enter a zero in this field if you are out of stock.)

Numbers are displayed as entered. If the count uses 3 characters, the next screen is automatically displayed.

```
Data Collection
Key or Scan the
Count
8--
```

Otherwise, press <ENTER>.

The screen prompts you for the next item number.

```
Data Collection
Key or Scan the
Item Number
-----
```

7. Repeat Steps 2, 4, and 6 with the next item. In addition, if the item has not previously been entered, perform Steps 3 and 5.
8. Repeat Step 7 until all items in this location have been inventoried. Then press <ALT><Q>.

The Physical Inventory menu is displayed.

```
===Phy Invent===
C)ollect Data
T)ransfer Data
O)ptions
```

Transfer Physical Inventory (PIFILE) Data

Follow procedures beginning on page 27 to transfer Physical Inventory data to the PC.

Set Options

When options are changed in Physical Inventory, Item Track and Asset Inventory options are not affected.

Follow procedures beginning on page 22 to set all options except field options.

Perform the following procedure to set the Name and length for Physical Inventory data fields.

Note

The length of a data field cannot be changed if Physical Inventory data has been collected and is still in the data file.

1. From the Physical Inventory menu, press <O>.

The Physical Inventory options menu is displayed.

```
===Phy Invent===
F)ield Options
P)rinter Options
U)pload Options
```

2. Press <F>.

The screen displays a list of the current names of the Physical Inventory data fields. The list does not fit on the screen.

```
Field Settings
-----
>Item Number
Location
```

3. Use the arrow keys to display more of the list.

With each press of the arrow keys, the “greater than “ symbol (>) shifts down the list to indicate the selected field name.

```
Field Settings
-----
Item Number
>Location
```

When the end of the list has been reached, the beginning of the list is again displayed.

```
Field Settings
-----
Location
>Count
```

```
Field Settings
-----
>Item Number
Location
```

4. When the field name to be changed is selected (> is in front of the name), press <ENTER>.

A data entry screen is displayed for the selected data field name.

```
Field Settings
-----
Field Name
Item Number_____
```

5. Use the <BKSP> key to delete unwanted characters.

The character to the left of the cursor is replaced by a blank each time the <BKSP> key is pressed.

```
Field Settings
-----
Field Name
Ite_____
```

6. Type the desired field name.

Characters are displayed as entered. If the field name uses the maximum allowed (15 characters), the next screen is automatically displayed.

```
Field Settings
-----
Field Name
EVIDENCE CTL NO
```

Otherwise, press <ENTER>.

If inventory data has been collected, the screen displays a warning.

```
Warning Warning
Data Collected.
No Length Change
Press any key.._
```

If no data is in the Physical Inventory data file, a data entry screen is displayed with the selected data field's current length displayed.

```
Field Settings
-----
Field Length
16
```

7. If you receive a warning message in Step 6, press<ENTER> and skip to Step 9. Otherwise continue procedures in Step 8.
8. Use the <BKSP> and number keys to enter the desired field length. This is the desired length for the data field, not the field name.

Characters are displayed as entered. If the field name uses the maximum allowed (2 characters), the next screen is automatically displayed.

```
Field Settings
-----
Field Length
9_
```

Otherwise, press <ENTER>.

The beginning Field Settings screen is displayed again (See Step 2). This time, the new field name is displayed in capital letters.

```
Field Settings
-----
>EVIDENCE CTL NO
Location
```

9. If desired, repeat Steps 2 through 8 to update additional field data. Otherwise continue to Step 10.

10. Press <ALT><Q>.

The Physical Inventory options menu is displayed.

```
===Phy Invent===
F)ield Options
P)rinter Options
U)pload Options
```

11. Press the letter for one of the Physical Inventory options. (Press <Q> to display the Physical Inventory main menu.)

NOTES

- a. When you change the name of a data field, it is displayed on the Apex II in capital letters.
- b. The greater than symbol moves in one of two slightly different patterns through the list, depending on which arrow key you press. Use the arrow key you prefer.