

EPES Software

Inventory

for Windows

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Introduction

Welcome to Inventory for Windows.

This program is designed to keep track of inventory purchased by the school.

You'll know what inventory items you've purchased by building, room, fund, vendor, dates, and much more.

You'll print a wide variety of reports to the screen or printer.

You'll use the mouse or keyboard to operate the program. Pull down Menus and Windows make the program extremely easy and quick to use. You don't have to be a CPA to operate the program. Double entry accounting is done automatically for you.

Help is just a keystroke away! Press [**F1**] or click on Help with the mouse at any time... from anywhere in the program.

Security is built into the program to protect your data from unwanted users.

It's simply to use, yet very effective.

You have two manuals:

I. School Inventory Manual

This manual explains the specific details about the EPES School Inventory program. Think of it like a recipe. It contains all the details or what you want to do.

The School Inventory manual contains:

<u>Chapter</u>	<u>Information</u>
1	Quick Start , Installing the program and Overview.
2	File Menu , Information to Add to the program.
3	Output Menu , Inventory Reports you can print to the screen or printer.
4	Utilities Menu , Special programs to simplify your work and how to do inventory using a portable bar code reader.
5	Using a Barcode Reader , How to use a portable barcode reader to do your inventory.

II. EPES Software Reference Manual

This manual explains how to:

- Select Menu Options.
- Use the keyboard or mouse.

- Make Backups of your data.
- Add, Edit, and Delete information... and much more.

The EPES Reference manual contains:

<u>Chapter</u>	<u>Information</u>
1	File Menu , How to select program options, Close Files, select Printers, and Exit the program.
2	Edit Menu , How to Edit entries.
3	Commands Menu , How to use the Tool Bar Menu to add, edit, and view information; how to use keyboard or mouse to move around in the program.
4	Output Menu , How to print reports to the screen or printer.
5	Window Menu , How to move a window on the screen, change it's size and select other windows on the screen.
6	Utilities Menu , Programs which perform special functions like backing up your data, recreating damaged indexes, etc.
7	Help Menu , How to get help using the program.
8	Administrator Menu , How to add users to the program and assign their rights to add, edit, delete or view information.

Think of the reference manual as an oven. You can use the oven every time you bake. Once you're familiar with how the oven works, you know how to use it for all your recipes.

We have one major objective in mind:

Once you know how to use one EPES program for Windows, you'll know how to use all of them.

How is the Manual Written?

The following information will help you understand how the manual is written.

<u>Symbol</u>	<u>Meaning</u>
[]	Information enclosed in brackets means to press a key. For example, [A] means press the letter A.

- < > Information enclosed in braces means to select a command on the screen. For example, < **Add** > means select the Add command.

- ' ' Information enclosed in single quotes means to select a Menu option. For example, '**Accounts**' means select the Accounts option from the Menu.

- " " Information enclosed in double quotes refers to a message on the screen or a section in your manual.

- _____ : Information followed by a colon refers to information you are to type into the program. For example, **Password:** means type in the password.

Chapter 1: Quick Start

This chapter is an overview of the School Inventory program. You'll learn how to install the program and get started.

Installing the School Inventory Program

Place the School Inventory Program **Diskette # 1** in your Floppy Drive A (or B). From the '**File**' Menu of the Windows Program Manager, select '**Run**'. Enter the following:

```
A:install [Enter] or
B:install [Enter].
```

To install the program, press **[Enter]** for each option that appears on the screen. When the program has been successfully installed, the final message you'll see will be "**Installation is complete**". Put the original program diskette(s) in a safe storage place.

First Time You Run the Program

The first time you run the program, you'll be asked to enter your School Name, Registration Number, and your Customer ID found on the enclosed package invoice.

Entering this information does not obligate you to purchase the program. We want to make sure this program meets your needs. You'll have 30 days to test it out and see for yourself.

You need to "**Log In**" before you can use the program. At the Log In screen, enter the following information:

```
ID: SYS <Enter>
```

```
Password: PASSWORD <Enter>
```

This is the ID and Password for the System Administrator. The System Administrator has total access (control) to everything in the program.

Once you've logged into the program, as the System Administrator, you can use the Administrator option from the **Master Menu** to add additional users or change passwords. You can also change the password, under the '**Change Password**' option of the **Utilities Menu**.

Daily Start Up

To start the program, select the School Inventory icon within the EPES Software Group of your **Windows Program Manager**.

Enter your ID and password.

Quick Overview

Chapter 2 **File Menu** gives you a step by step outline of what you need to do to set up your inventory program and begin adding information. All standard reports are explained in detail in Chapter 3 **Output File**. These reports provide you with all the detailed information you'll need about your inventory.

Chapter 4 **Utilities Menu** explains the Inventory Preference program.

Chapter 5 **Using a Barcode Reader** explains how to do your inventory using a portable barcode reader.

Chapter 2: File Menu

This chapter explains how to set up your School Inventory Program and begin adding information under the **File Menu**.

Setting Up the Inventory Program

Use the following steps to set up your program:

STEP 1 - Get to the Master Menu

Select the School Inventory icon from your Windows Program Manager to start the program.

Enter the following information:

ID: **SYS**

(or the ID that has been set up for you.)

Password: **PASSWORD**

(or the password you have set up for you.)

The **Master Menu** will appear.

STEP 2 - Enter your Inventory Preferences

Select '**Inventory Preferences**' under the **Utilities Menu**. Complete the information on the screen as explained under the heading "**Inventory Preferences**" in Chapter 4 of this manual.

STEP 3 - Add Your Building Information

Select '**Building**' under the **File Menu**.

Select < **Add** >. Enter the following information.

Build Code: Enter a unique building code for this building and press **[Enter]**. For example: **HIGH**.

Build Desc: Enter a complete description of the Building and press **[Enter]**.

For example: **Magnolia High School**

Use the Tool Bar Menu at the top of the screen.

More, Save, Cancel (Tool Bar Menu)

Select < **More** > to save this entry and add another one.

Select < **Save** > to save this entry.

Select < **Cancel** > to undo what you've added and exit.

When you've finished, select < **Close** > to return to the **Master Menu**.

STEP 4 - Add Classification Codes

Select '**Class**' under the **File Menu**.

Select < **Add** >. Add the following information.

Class Code: Enter a unique code for this Classification and press [**Enter**]. For example: **AUDIO**.

Class Desc: Enter a complete description of the classification and press [**Enter**].

For example: **Audio Visual Equipment**

More, Save, Cancel (Tool Bar Menu)

Select < **More** > to save this entry and add another one.

Select < **Save** > to save this entry.

Select < **Cancel** > to undo what you've added and exit.

When you've finished, select < **Close** > to return to the **Master Menu**.

STEP 5 - Add Fund Codes

Select '**Fund**' under the **File Menu**.

Select < **Add** >. Add the following information.

Fund Code: Enter a unique number for the fund. For example: **100**.

Fund Desc: Enter a description of the fund code. For example: **General Fund**.

More, Save, Cancel (Tool Bar Menu)

Select < **More** > to save this entry and add another one.

Select < **Save** > to save this entry.

Select < **Cancel** > to undo what you've added and exit.

When you've finished, select < **Close** > to return to the **Master Menu**.

STEP 6 - Add Inventory Items

Note: Be sure you've entered your basic vendors under step 8 below before completing this information. It'll save you a lot of time.

Select '**Inventory**' under the **File Menu**.

Select < **Add** >. Add the following information.

Prop No: Enter a unique number for each inventory item. For example:
101

Note: If you use the bar code scanner to do your inventory, you'll need a different number for each item. One of the most difficult tasks in doing a school inventory is keeping track of where inventory items are currently located. Inventory items change quickly and too easily. The bar code inventory report will tell you where each item (that was moved) is currently located.

Description: Enter a brief description of the item.

Serial No: Enter the serial number for the item.

Purchase Date: Enter the date the item was purchased. For example:
09/09/93.

Vendor Code: Enter the code for the vendor from whom you purchased the item or press [**F5**] to select from a popup window.

Fund Code: Enter the fund code for the funds used to purchase the item and press [**Enter**] or press [**F5**] to select from a popup window.

% State: Optional, enter the percentage of state moneys used to purchase this item.

% Fed: Optional, enter the percentage of federal moneys used to purchase this item.

Note: Local percentage is assumed to be 100% unless state and/or federal percentages are used.

Check Number: Enter the check number used to purchase this item.

P.O. No: Optional, enter the purchase order number used to purchase this item.

Quantity: Enter the number of items purchased.

Note: If you use the portable bar code scanner to do your inventory, the quantity should be 1. That means each inventory item is assigned a unique number. See Chapter 4.

Cost/Unit: Enter the cost per unit of the item purchased. The total extended cost will be displayed on the right side of the screen.

Depr. Period: Optional, enter in the number of years this item will be depreciated. Example: 5

Depr. Value: Automatically calculated by the computer using a straight line depreciation.

Replacement \$: Optional, enter in the cost to replace this inventory item.

Building Code: Enter the code for the building where this item was placed or press **[F5]** to select from a popup list.

Room Number: Enter the room number where this item was placed.

Notes: Enter any notes about this inventory item.

Class Code: Enter the classification code for this item or press **[F5]** to select from a popup list.

Date Deleted: Enter the date this item was taken out of inventory.

Why Deleted: Enter a brief description of why this item was deleted.

Authorized: Optional, enter in the initials for the person who authorized the deletion of this inventory item.

More, Save, Cancel (Tool Bar Menu)

Select < **More** > to save this entry and add another one.

Select < **Save** > to save this entry.

Select < **Cancel** > to undo what you've added and exit.

When you've finished, select < **Close** > to return to the **Master Menu**.

STEP 7 - Add Inventory Scan

Use this option to enter information scanned into your portable barcode reader. See Chapter 5 for details on using the portable bar code reader.

STEP 8 - Add vendors

Enter your most frequently used vendors now.
Select < **Add** >. Add the following information.

Vendor Code: Enter a unique abbreviation for this vendor. For example: **WALM** (for Walmart).

In the box to the right, enter:

Vendor: Enter the vendor's name. For example: **Walmart Store #120.**

Note: If you don't need any other information about your vendors, select

< **More** > to save your information and continue adding.

Add the rest of your frequently used vendors the same way.

When you're done, press [**Esc**] twice to return to the **Master Menu**.

Attention: Enter the name of the contact person for the vendor.

Address: Enter the vendor's address.

P.O. Box: Enter the vendor's P.O. Box.

City: Enter the vendor's city.

State: Enter the two digit abbreviation for the vendor's state.

Zip: Enter the vendor's zip code. The last four digits are optional.

Telephone: Enter the vendor's telephone number, area code first.

Fax: Enter the vendor's telephone fax number, area code first. This item is optional.

Tax Id No: Enter the vendor's federal ID number or social security number.

Bid Categ: Optional, use this item to identify the kinds of items the vendor supplies. To do this:

1. First, develop some unique bid codes. Use one digit (letters or numbers) codes. For example:
 - A = Audio Visual
 - C = Computer Equipment
 - E = Electronic Equipment
2. Next, determine which items this vendor supplies.
3. Enter the codes for the items the vendor supplies. For example: if the vendor supplied computer and electronic equipment, enter: **CE** as the bid codes.

Memo: Enter any notes about the vendor. Use the [**Tab**] key to exit.

More, Save, Cancel (Tool Bar Menu)

Select < **More** > to save this entry and add another one.

Select < **Save** > to save this entry.

Select < **Cancel** > to undo what you've added and exit.

When you've finished, select < **Close** > to return to the **Master Menu**.

STEP 9 - Do your Inventory using a Barcode Reader

See Chapter 5 for details on how to do your inventory using a portable barcode reader.

Chapter 3: Output Menu (Reports)

This chapter explains the Standard Reports to print to the screen or printer.

Note: This Menu is **Not** highlighted if you are viewing information on the screen. Quit what you're doing and return to the **Master Menu**.

Select **Output** from the Master Menu, and select from the following reports.

Inventory Reports - Basic

This report option prints your basic inventory reports. It uses the Report by Query format. Use the '**Retrieve...**' option to select the report you want:

- Inventory by Check No.
- Inventory by Class
- Inventory by Fund
- Inventory by Property No.
- Inventory by Purchase Date
- Inventory by Purchase Order No.
- Inventory by Vendor

Select < **PreView** > to view the report on your screen.

Select < **Print** > to print this report to your printer.

See the EPES Reference manual, Chapter 4, to learn how to limit the information printed and save your work for later use.

Inventory by Building

This report prints a list of Inventory by Building and Room. It uses the Report Query Format.

Select **PreView** to print to the screen.

Select **Print** to print to your printer.

See the EPES Reference manual, Chapter 4, to learn how to limit the information printed and save your work for later use.

Inventory by Room

This report prints a list of Inventory by Room. It uses the Report Query Format.

Select **PreView** to print to the screen.

Select **Print** to print to your printer.

See the EPES Reference manual, Chapter 4, to learn how to limit the information printed and save your work for later use.

Deleted Inventory

Use this option to print a list of deleted inventory items.

Select **PreView** to print to the screen.

Select **Print** to print to your printer.

See the EPES Reference manual, Chapter 4, to learn how to limit the information printed and save your work for later use.

Standard Labels

This option prints one inventory label per entry in order by property number. Use these labels to identify your inventory items. It prints on 3 1/2" X 15/16" one column labels on Dot Matrix Printers. It prints on 2.6" X 1" three column labels on Laser printers.

Note: Contact Tom Brock at 877-325-0189 for details on labels.

Property Numbers: (•) All () Range

Press **[A]** to print all property numbers.

Press **[R]** to select a range of property numbers. Enter the lowest property number to use in the "**From:**" box. Enter the highest property number to use in the "**To:**" box.

[] Print Sample Label First - (Dot Matrix Only)

If you're using a Dot Matrix printer, press **[S]** to check this box. One sample label will be printed to allow you to line up your labels.

If you're using a Laser Printer, this option is not available.

Note: The Laser labels print 30 items per page. To avoid wasting labels, you should select a number as close to 30 as possible when selecting a range of labels to print out.

Select **< OK >** to print your labels.

Select **< Cancel >** to return to the Master Menu.

Bar Code Labels

Note: This option is only available if you've purchased the bar code software and copied it to your hard disk in the same directory as your inventory program. The default directory is: **C:\IN VW**.

This option prints bar code labels for your inventory items. It prints on 3 1/2" X 15/16" one column labels on Dot Matrix Printers. It prints on 2.6" X 1" three column labels on Laser printers.

Note: Contact Tom Brock at **877-325-0189** for details on labels.

Select Inventory Barcodes labels based upon:

Use this option to select which inventory barcode labels to print. You have three options:

- 1) Property # - Select your inventory barcode labels based upon the property number.
- 2) Building - Select your inventory barcode labels based upon a building. Use this option to limit the inventory barcode labels printed out by a building code. For example, suppose you want to print the barcode labels for one building.
- 3) Room - Select your inventory barcode labels based upon a room number. Use this option to limit the inventory barcode labels printed out by a room number. For example, suppose you want to print the barcode labels for one room.

- All Labels**
- Range of Labels**

Press **[A]** to print all inventory barcode labels.

Press **[R]** to select a range of inventory barcode labels.

Enter the lowest value to use in the "**From:**" box.

Enter the highest value to use in the "**To:**" box.

Note: The Laser labels print 30 items per page. To avoid wasting labels, you should select a number as close to 30 as possible when selecting a range of labels to print out.

Select **< OK >** to print your labels.

Select **< Cancel >** to return to the Master Menu.

Bar Code: Inventory Status Report

This report prints out discrepancies in inventory based on the information collected from the portable bar code scanner. It will tell you:

- inventory items that has been moved, where they're currently located and
- inventory items that were not found.

Answer the following questions:

Report Title: Enter a descriptive title for this report.

Building Code: (•) All () One

Press [Enter] or [A] to select all building codes.

Press [O] to select one building code. Enter the building code.

Room Number: (•) All () One

Press [Enter] or [A] to select all room numbers.

Press [N] to select one room number. Enter the room number.

[] **Separate Page for each room**

Press [R] to print a separate page for each room.

(•) **Print to Screen**

() **Print to Printer**

Press [S] to print your report to the screen.

Press [P] to print your report to your printer.

Select < OK > to continue.

Select < Cancel > to exit.

Depreciation Report

This report prints out the depreciation value of your inventory based upon a straight line depreciation. Inventory items that have a depreciation period of 0 will not appear on the report.

Answer the following questions:

Report Title: Enter a descriptive title for this report.

Fund Code: (•) All () One

Press [Enter] to select all fund codes.

Press [O] to select one fund code. Enter the fund code.

Date: (•) All () Range

Press [Enter] to select all dates.

Press [R] to select a range of dates. Enter the earliest date in "**From what date**" and the latest date in "**To what date**" box.

Note: The depreciation report uses the **To what date** to determine the cut off period for calculating the depreciation for your report. Today's date is the default.

(•) Print to Screen

() Print to Printer

Press [S] to print your report to the screen.

Press [P] to print your report to your printer.

Select < OK > to continue.

Select < Cancel > to exit.

Replacement Report

This report prints out the replacement cost for all inventory items having a replacement cost greater than 0.

Answer the following questions:

Report Title: Enter a descriptive title for this report.

Fund Code: (•) All () One

Press [Enter] to select all fund codes.

Select 'One' to select one fund code. Enter the fund code.

Date: (•) All () Range

Press [Enter] to select all dates.

Press [R] to select a range of dates. Enter the earliest date to use in '**From what date:**' and latest date to use in '**To what date:**'.

Building Code: (•) All () One

Press [Enter] to select all building codes.

Select 'One' to select one building code. Enter the building code.

Room Number: (•) All () One

Press [**Enter**] to select all room numbers.

Select '**One**' to select one room number. Enter the room number and press [**Enter**].

(•) Print to Screen

() Print to Printer

Press [**S**] to print your report to the screen.

Press [**P**] to print your report to your printer.

Select < **OK** > to continue.

Select < **Cancel** > to exit.

Report Writer

This chapter explains how to enter your report parameters for the reports utilizing the R&R Report Writer.

For our example we are using the Outstanding Check report. All reports use the same method to include/exclude data and select sort sequences.

Once you have selected the report you will see the "Report Query" screen. The "Report Selected" is preset and cannot be changed. You can enter whatever information you desire on the "Report Title" line. This information will print on the top of each page of your report.

The 3 items you will need to enter to generate the report (if you choose to not enter any parameters, a report of all data in the file will be printed or displayed.

The items required to limit reporting are:

Select Fields to Limit:

The information shown under this column are the fields that can be used to limit data. These are not necessarily the only information that prints on the report but these are the only fields you can select to include/exclude information. You cannot eliminate any of these fields from the report but you can limit the data printed using this field.

Enter Lowest/Highest Values to include on Report:

These 2 columns are where you will enter the information that you want to see on the report. In our example below we will explain its usage.

Enter Sort Order:

This column can be used to specify in what order you want the report to print.

Example:

On the Outstanding Checks report the fields shown under the "Select Fields to Limit" column are:

Check Number
Date
Total Amount
Payee
GL Account

Notice the box to the left of the "Select Fields" column.

If you want to use this field to enter your selection criteria, you must first click on the box to the left to indicate your usage of this field.

Ex: If we wanted to print a list of Outstanding Checks for the month of July, 2001 we would first click on the box to the left of "Date" then we would tab over to the "**From**" field under the "Enter Lowest/Highest value" column and we would enter 07/01/2001, then we would tab to the "**To**" field under the "Enter Lowest/Highest value" column and we would enter 07/31/2001 then we would click on [**Print**]. This would produce a report that shows all outstanding checks from July 1 thru July 31, 2001.

There is no limit to the number of fields you can use with your selection criteria. If you wanted to print outstanding checks for July 2001 that were written to a specific Vendor (for example Walmart), you would enter the same information as above, plus you would check the box to the left of "Payee", tab to "From:" under the "Enter Lowest/Highest" and enter "WALM", or whatever Vendor Code you setup for Walmart, then tab to the "To" field under the "Enter Lowest/Highest? column and enter "WALM". This would produce a report of all outstanding checks from 7/1/2001 thru 7/31/2001 that were written to Walmart.

Enter Sort Order 1,2,3

This column is used to sort the report in whatever sequence you prefer. Some of the reports have the first sort order predefined. You cannot change the predefined sort orders but you can indicate what sequence you want the secondary sort order in.

Ex: Lets produce a report of Outstanding checks that are between \$100.00 and \$150.00 and we want them in check number and date sequence. First you would click on the box to the left of "Total Amount", then tab over to the "From" field, enter 100.00, tab to the "To" field, enter 150.00. Now you're ready to specify your sort order. Notice

that the "Check No" field is already defaulted as the first sort sequence. You would simply click on the box to the right of "Date" under the "Enter Sort Order" column and you would put a 2 in this box. These parameters will produce a report of all outstanding checks with a total amount of \$100.00 thru \$150.00 and they would be sorted in check number and date sequence with check number being the highest sort sequence.

All the reports using the R&R Report Writer query are developed in this same manner. After you click on "**Print**" the report will be displayed on the screen. From that display you have the option to print the report or exit back to your original screen. Once you enter data into a report query that data will be shown the next time you access this same report query screen. To start a new query you will need to click on the "**Clear Report**" option on the bottom of the screen to remove the previously defined query options.

Chapter 4: Utilities Menu

This chapter explains the **Utilities Menu** programs that are unique to the Inventory Program. All other Utility Menu programs are explained in detail in Chapter 6 of the EPES Reference Manual.

Select the **Utilities Menu** and select from the following options.

Inventory Preferences

Use this screen to enter some basic program information.

Printer: Select your type printer.

1 = Laser Printer

2 = Dot Matrix Printer

Printer Port: Normally your printer uses printer port LPT1. Select LPT2 or LPT3 if you're using a different printer port.

Unique Property Number:

Unique Property Number Check this box to make the property numbers unique.

Turn Century On: Check this box to turn on the century and have the date displayed with a four digit year.

Bar Code Data

You have two options:

Update inventory file to location(s) in Bar Code Data file.

This option will update all inventory items to reflect the current location as shown in the bar code file.

To select this option, press **[U]** or click on the box with the mouse.

The box will be marked with an **[X]**.

Erase all Bar Code data and start over

This option will completely erase all information in the **Scan Bar Code** data file.

To select this option, press **[E]** or click on the box with the mouse.

The box will be marked with an **[X]**.

As a safety precaution, you'll then be asked if you want to Zap the Invscan data file. Press [Y] for yes or [N] for no.

Chapter 5: Using a Barcode Reader

This chapter explains how to do inventory using a portable bar code scanner.

All the **Utility** Menu options except **Bar Code Data** are explained in the EPES Software Reference Manual.

STEP 1

Enter your inventory information.

- If you want to scan in a Building Code or a Room Number, these codes must be numbers. Otherwise, you'll need to enter them in manually when beginning to inventory a new room.
- Each inventory item should have a unique property number (to permit tracking of inventory by location).

STEP 2

Select the **Bar Code Labels** option under the **Print** Menu. Print bar code labels for your inventory items, building codes, and room numbers. Place the bar code labels on each inventory item.

Dot Matrix Printer: Uses One across labels

Laser: Uses 3 across by 10 row labels

STEP 3

If you have previously done an inventory with this program, select the **Bar Code Data** option under the Utilities, Program Configuration (explained later in this chapter) to erase existing bar code information.

<p>Note: Only erase the Inventory Bar code data once as you begin to do a new inventory.</p>

STEP 4

Assembling the TriCoder

Assembling the TriCoder is as easy as plugging in a telephone. There are just two cables to connect.

- Plug the 5 Volt Power Supply into a wall outlet and then into the bottom of the TriCoder. The TriCoder will power on as soon as the

wall power is plugged in, even though the power switch may be in the off position.

- Plug the wand into the TriCoder's WAND port, located on the right side of the TriCoder. This cable will also click into place.
- The TriCoder display will read:

```
TriCoder
HIT ANY KEY_
```

- Press any key on the TriCoder keypad.
- The TriCoder display will read:

```
NONPORTABLE MODE
```

- Data can't be collected until the TriCoder is configured.

STEP 5

Configuring The TriCoder

Tip: To scan bar codes, hold the bar code wand at its belt and squeeze lightly. You'll see a red light at the tip before you scan.

- Use the bar code reader to scan the following code:



- When the code is scanned, the TriCoder will beep and display the **START SETUP** prompt.
- Scan in the following bar code to select **Codabar**, which is the default bar code format.



- After the beep, the following prompt will be displayed:

```
CODABAR 134_
```
- Scan the following bar code.



- The display should now show:
CODABAR
034_

- Now scan the following bar code to set the appropriate Intercharacter Delay.



- The following prompt should be displayed: **INTERCHAR. DELAY**
0_

- Scan the following bar code to set the delay to 2.



- You will see a 2 instead of a 0.
- To complete the TriCoder configuration scan the following bar code.



- The **NONPORTABLE MODE** prompt should now be displayed once again.
- The TriCoder is now configured to work with the School Inventory Program.

STEP 6
Programming the TriCoder for Remote Inventory Scanning

Before scanning in inventory items, the TriCoder must be programmed to receive the inventory data. Entering this program into the TriCoder requires scanning the bar codes included in this documentation and pressing a few buttons on the TriCoder's keypad. This will take about 10 minutes.

Entering Program Mode

- To enter setup mode scan the following bar code:



- Scan the following bar code to set the operation mode.



- The TriCoder display should read:

OPERATION MODE
0_

- Scan this bar code to set the operation mode to programming mode:



- Scan the following bar code to exit the setup mode and enter programming mode.



- Before a program can be entered or edited, a password must be entered. This password protects the stored programs from accidental change. Using the keypad on the TriCoder, type in **[W][D][T][R][I]** and press the green **[Enter]** key.

Entering the Inventory Scanning Program

- The TriCoder's display will ask for the program number to change. There are three different program areas. Program area 1 contains a default program, but areas 2 and 3 are empty. Choose program area 2 by pressing the number **[2]** on the TriCoder keypad.
- Press the green **[Enter]** key in answer to the question **Edit Program 2.**
- Each program is given a name. This program should be called INVENTORY. To type INVENTORY, press the **[Shift]** key on the TriCoder to change to alphabet characters. After you press the **[Shift]** key, the blinking cursor on the TriCoder display changes from a blinking underline to a blinking rectangle. Use the TriCoder keypad to enter **[I][N][V][E][N][T][O][R][Y]** and press the green **[Enter]** key.

The inventory program requires three program lines. After the program is entered once, the TriCoder will remember the program for future use.

- After you enter the program name, the display will read:
ENTRY TYPE 01

Press the **[SHIFT]** button and then the **[D]** key. Press the green **[Enter]** key.

- Next, you need to enter a prompt. Using the keypad press the **[SHIFT]** key and type **[E][N][T][E][R]**. Press the key with **[SP]** written on it to type in a space. Now, using the keypad, type: **[B][U][I][L][D][I][N][G]**. The display will read:

```
PROMPT      01
ENTER BUILDING_
```

If you make a mistake, use the **red delete** button to erase and make the correction. After you enter the prompt correctly, press the green **[Enter]** key.

- When prompted, **Frequency 01**, press **[Enter]** to select **E** as the default.
- When prompted, **Message Number 01**, enter **00**, to indicate no voice message.
Note: If you wish to include a voice message prompt, see the instructions in the appendix of the TriCoder manual for details.

- Press the green **[Enter]** key at the prompt: **DATA ID**.

- Press the green **[Enter]** key at the prompt: **DATA TYPE**.

- The **MAX DATA LEN** is **05**. Press the red **[DELETE]** key and then press **[5]**. The display should read:

```
MAX DATA LEN  01
05_
```

Press the green **[Enter]** key.

- The **MIN DATA LEN** is **01**.
- Press the green **[Enter]** once again when asked for the **INPUT DEVICE**.
- The next prompt is **YES/NEXT STMT 01**. Press **[0][2]**, then press the green **[Enter]** key.
- At the prompt **NO/END STMT 01**, press **[9][9]** and the green **[Enter]** key.

- The **UPLOAD PREFIX 01** prompt should now be displayed. Scan in the following bar code:



A tilde (~) will show up on the display. Type in a zero **[0]**.

```

UPLOAD PREFIX 01
~0_

```

Press the green **[Enter]** key.

- Press the green **[Enter]** key at the **UPLOAD SUFFIX 01** prompt.
- At the prompt: **ENTRY TYPE 02**, press the **[SHIFT]** button, then press the **[D]** key. Press the green **[Enter]** key.
- Now, you're ready to enter the prompt for line number 2. Using the keypad, press the **[SHIFT]** key and type **[E][N][T][E][R]**. Press the **[SP]** key to type in a space. Type **[R][O][O][M]**. Now, scan in the following bar code to make the display read:



```

PROMPT          02
ENTER ROOM#_

```

Use the red delete button to erase and make corrections if you make a mistake. Press the green **[Enter]** key.

- When prompted, **Frequency 02**, press **[Enter]** to select **E** as the default.

When prompted, **Message Number 02**, enter **00**, to indicate no voice message.

Note: If you wish to include a voice message prompt, see the instructions in the appendix of the TriCoder manual for details.

- Press the green **[Enter]** key at the prompt: **DATA ID**.
- Press the green **[Enter]** key at the prompt: **DATA TYPE**.
- The **MAX DATA LEN** for a room number is 10. Press the red **[DELETE]** key twice and then press **[1][0]**. The display will read:

```

MAX DATA LEN  02
10_

```

Press the green **[Enter]** key.

- The **MIN DATA LEN** is 01.
- Press the green **[Enter]** once again when asked for the **INPUT DEVICE**.

- The next prompt is **YES/NEXT STMT 02**. Press [0][3], then press the green **[Enter]** key.
- At the prompt **NO/END STMT 02**, press [0][1] and the green **[Enter]** key.
- The **UPLOAD PREFIX 02** prompt will be displayed. Scan the following bar code:



A tilde(~) will appear on the display. Type in a zero [0].

```

        UPLOAD PREFIX 02
        ~0_
    
```

Press the green **[Enter]** key.

- Press the green **[Enter]** key at the **UPLOAD SUFFIX 02** prompt.
- At the prompt: **ENTRY TYPE 03**, press the **[SHIFT]** button and then the **[D]** key. Press the green **[Enter]** key.
- You're ready to enter the prompt for line number 3. Using the keypad, press the **[SHIFT]** key and type **[E][N][T][E][R]**. Press the **[SP]** key to type in a space. Next, type in **[P][R][O][P][E][R][T][Y]**. Scan the following bar code to make the display read:



```

        PROMPT          03
        ENTER PROPERTY#_
    
```

If you make a mistake, use the red delete button to erase and make corrections. Press the green **[Enter]** key.

- When prompted, **Frequency 03**, press **[Enter]** to select **E** as the default.

When prompted, **Message Number 03**, enter **00**, to indicate no voice message.

Note: If you wish to include a voice message prompt, see the instructions in the appendix of the TriCoder manual for details.

- Press the green **[Enter]** key at the prompt: **DATA ID**.

- At the prompt: **DATA TYPE**, press the [**SHIFT**] key, type [**N**]and [**Enter**].
- The **MAX DATA LEN** for a room number is 10. Press the red [**DELETE**] key **twice**, then press [**1**][**0**]. The display will read:

```
MAX DATA LEN  03
10_
```

Press the green [**Enter**] key.

- The **MIN DATA LEN** is 01.
- Press the green [**Enter**] once again when asked for the **INPUT DEVICE**.
- The next prompt is **YES/NEXT STMT 03**. Press [**0**][**3**], then press the green [**Enter**] key.
- At the prompt **NO/END STMT 03**, press [**0**][**2**] and the green [**Enter**] key.
- The **UPLOAD PREFIX 03** prompt should now be displayed. Scan, in order, the following bar codes:



A close brace "}" will be displayed. Type in a [**1**] and scan this bar code.



A question mark will appear scanned.

Scan the following bar code.



Another close brace "}" will follow the question mark. Press the number [**2**] key and scan the following bar code.



The display will read:

```

      UPLOAD PREFIX 03
      }1?}2?_

```

If you make a mistake, use the red delete button to erase and make corrections. Press the green **[Enter]** key.

- At the **UPLOAD SUFFIX 03** prompt, scan the following bar code:



Press the green **[Enter]** key.

- To save the program, press the **[F1]** key at the prompt: **ENTRY TYPE 04**. The **[F1]** key is the second key on the top row. The display will show:

```

      PROGRAM NO.?
      KEY [1-3]?_

```

- Scan the following bar code to enter setup mode.



- Scan the following bar code to enter operation mode.



- At the **OPERATION MODE** prompt scan the following bar code to change to **Data Collection** mode.



The display should show:

```

      OPERATION MODE
      2_

```

- Scan the following bar code exit setup mode:



Step 7**How to Scan Inventory Bar Code Labels**

The next prompt asks: **DATA COLLECTION?** If you're ready to scan inventory labels, answer **YES** by pressing the green **[Enter]** key.

- At the prompt:

```
PROGRAM NO.?  
KEY [0-3]?
```

Press the **[2]** button to run program #2.

Program number 2 is the Inventory program just entered.

- At the prompt: **ENTER BUILDING**, type in the appropriate building code using the keypad followed by the green **[Enter]** key. If bar code labels have been printed for building codes, you may scan the building code using the bar code wand.
- Next, the prompt: **ENTER ROOM#** is displayed. You can enter the room number using the keypad followed by the green **[Enter]** key, or scan it from a room# label printed from the inventory program.
- Scan the bar code labels for each inventory item in the room using the bar code wand.
- After all items in the room are scanned, press the **[END]** key.
- When you press the end key, the next room# is requested. Enter or scan the next room number and scan the bar codes for the inventoried items in the room you just entered.

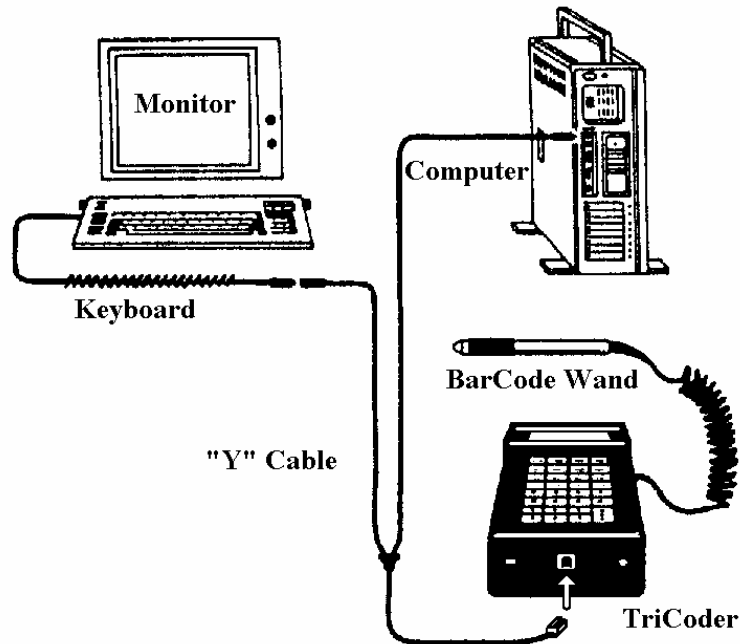
Note: If an inventory item is accidentally scanned in twice, press the left arrow **[←]** to review the data previously scanned. Press the right arrow **[→]** to move toward the end of the scanned data. When one of the duplicate entries is displayed, press the **[CLEAR]** button followed by the green **[Enter]** button. To exit out of **viewing** the program and go back to **entering** data, press the **[F1]** button.

- After you have scanned all items in this room, press the **[END]** key.
- To change buildings, press the **[END]** key at the prompt: **ENTER ROOM#**. Enter the next building at the **ENTER BUILDING** prompt.
- To exit the INVENTORY program, press the **[END]** key until the **DATA COLLECTION?** prompt is displayed.

When you have scanned all your inventory information into the TriCoder, you'll need to connect the TriCoder to the computer. This lets you upload your scanned data into the computer.

STEP 8

Installing The TriCoder for Uploading Data



- Turn the computer off.
- Unplug the keyboard cable where it plugs into the computer.
- Plug your keyboard's cable into the "Y" cable's female round end connector.
- Plug the "Y" cable's round male (pronged) connector into the back of the PC where the keyboard was previously plugged.
- Plug the 5 Volt Power Supply into the bottom of the TriCoder. The TriCoder will power on as soon as the wall power is plugged in, even though the power switch may be in the off position.
- Plug the modular telephone style jack at the Y end of the "Y" cable into the port at the bottom of the TriCoder. The cable will click into place, when properly inserted.
- Turn the computer back on.

STEP 9

Uploading Inventory Data from the TriCoder to the Inventory Program.

Use your portable bar code reader to inventory each room. Your reader will hold up to 2000 items before you have to stop and upload the information to your computer.

- Start the Inventory Program and get to the **Master Menu**.
- Highlight **Inventory Scan** under the **File** Menu.
- The screen titled **Invscan** should appear.
- Click on **Add** records, then return to your TriCoder.
- The TriCoder display will read: **DATA COLLECTION?**. Before you can upload data, you must have previously scanned in bar codes using the **Data Collection Mode**. Press the **[NO]** key to skip data Collection Mode.
- **Data Upload** is requested next. Before pressing the green **[Enter]** key, check the following two items:
 - 1) The TriCoder and the keyboard are connected properly to the computer.
 - 2) The Inventory program is running and the **Invscan** windows is on the screen in **Add** mode with the **Building** field highlighted.
- Press the green **[Enter]** key to start the data upload. The information will be transferred to the Inventory Program from the TriCoder in just a matter of seconds.
- After all data has been uploaded, the message:

```
END OF TRANSMIT  
DEL FILE [Y/N]?_
```

will be displayed. Before answering, press the **[ESC]** key on the computer's keyboard to exit **Add** mode. Select **List** (view) and double check to be sure the data was added correctly.

- If the data was NOT added correctly, press the **[NO]** button on the TriCoder so the file won't be deleted. Repeat the steps for **Uploading Inventory Data from the TriCoder to the Inventory Program**.
- If the data was added correctly, press the green **[Enter]** key on the TriCoder's keypad.

- Answer YES once again when asked **ARE YOU SURE?**, by pressing the green **[Enter]** key.

STEP 10

Repeat Steps 7 and 9 until all your inventory has been entered.

STEP 11

Select the **Bar Code Inventory** report from the **Print** Menu. Run this report. It will tell you which items have been moved to a different location and which items were not found.

STEP 12

If an item was overlooked and not scanned in, manually add it to the **Scan Bar Code** file under the **File** Menu.

If an inventory item was in the wrong location when inventory was taken or has been moved since the inventory was completed, edit the **Scan Bar Code** file and change the location of the item to its current correct location.

STEP 13

To change your inventory file to match the same locations in the **Scan Bar Code** file, select the Bar Code Data option (explained in next section below).

Select the first option: **Update Inventory file to locations in the Bar code Data file**. This option will update all inventory items to reflect the current location as shown in the bar code file.

If your report shows inventory items were not found, record a deletion date and Why Deleted in the inventory file.

<p>Note: Don't forget to erase the bar code data information once your inventory is completed. This is also explained in the next section.</p>

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