AMSI User Manual
Site Users

V1.0.2

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Prepared by:

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Overview

The AMSI system is an add-on to the existing SCS Inventory Management System (EQP) that will facilitate automation of the data gathering and labeling of fixed assets. The primary functions provided are:

- Gather information via barcode scanner currently written on the 'Shelby County Schools Asset Disposition Form'
- Print on demand labels for new assets
- Perform annual physical inventory via barcode scanner of all assets tracked by SCS
- Allow inventory audits outside of annual physical inventory
- Allow inventory reporting at the school level

The user will have access to the following transactions:

- Add (New)
- Tag Confirm
- Transfer Out
- Receive Transfer
- Stolen
- Disposal Request
- Reactivate
- Physical Inventory
- Cycle/Audit Count

This User Manual will show how to perform each transaction and the data flow through the components of the system. The major components or applications that the users will see are:

- Admin Web Application
- Handheld Terminal Application
- Scanner DataEngine Application

Office of Asset Management Email Address

For general questions or to provide additional information about tracked or non-tracked Assets please contact the Office of Asset Management via the following email address:
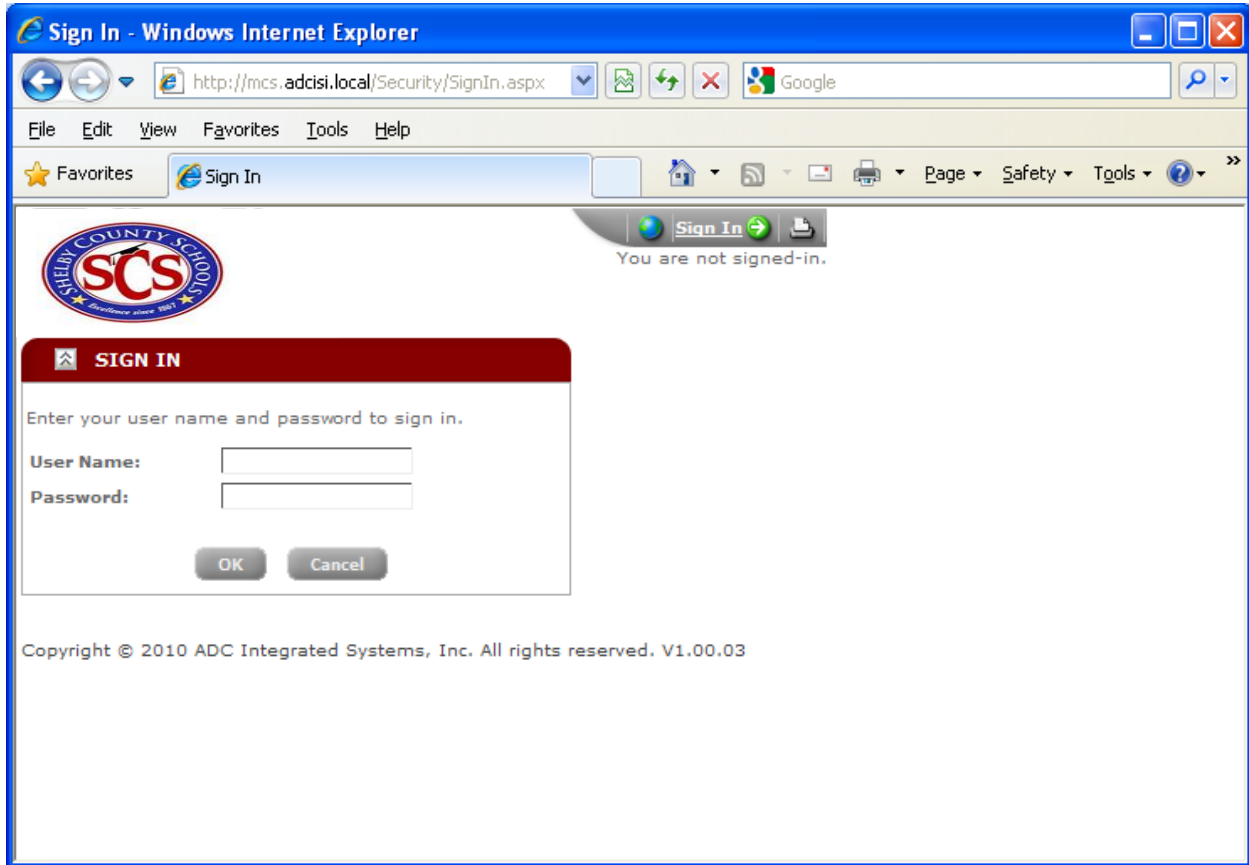
amsirequest@scsk12.org

Applications – General Information

Admin Web Application

Home Page

The URL for the Admin Web Application is http://amsi.scsk12.org/AMSI.

Special Function Icons

There are a number of standard functions found throughout the Admin Web Application. These are represented by icons. Following are some of the standard icons and their associated function.

 - View a data record

 - Select Record

 - Export current data view to an Excel spreadsheet

 - Rest all filters to default values

Search

At the top of most pages there is also a 'Search For' box that allows for quick searches on particular fields. An example of one is from the Inventory screen:

Search for [_____]   [Go]

(Search Fields: Item Number, Serial Number, Model Number, Manufacturer or Vendor Name)

Enter the exact value you would like to search and click 'Go' and the system will search each of the 'Search Fields' listed.

Filters

Another handy search feature is the use of Filters. Filters are in several forms:

- Dropdown Lists
- Scrolling List Boxes – Multi Select
- Input Boxes – Single Value
- Input Boxes – Range

Each screen will have filters based on the data content of that screen. Following are the filters from the Inventory screen:

Class Code	All ▾
Acquisition Date	[_____] to [_____]
Program Project	All / EXCEP CHLD
Location	All ▾
Sub Location	All / 1A
Room	All ▾
Current Status Code	All / Missing In / New / Scrapped In
Active	Yes ▾

[Go]

Dropdown List Filters are executed immediately upon selection of a new value. List Boxes and Input Boxes require you to click 'Go' for the display results to be filtered.

To reset the filters back to the default value click the 'Reset Filter' icon 🔽.

Sorting Data

Most of the data columns displayed can be sorted by clicking on the column label above the data. The data can only be sorted by one column at a time. So if you prefer to sort the data by Manufacturer then click on the 'Manufacturer' label above that column. Clicking the column label again sorts in reverse order.

Original Order   First Sort   Second click yields Reverse Sort

Manufacturer		Manufacturer		Manufacturer
HP		APPLE		WURLITZER
PHILIPS MAGNAVOX		APPLE		VST
SYMPHONIC		APPLE		VST
EMERSON		APPLE		VST

Pagination Control

You can also control how much data is displayed on the screen as well as quickly move through pages using the Pagination Control. An example of the Pagination Control is below:

This indicates the following:

- Currently viewing page 1 of 25
- A total of 241 items are available for viewing
- Currently viewing 10 items per page

Use the Double Arrow icon to move to the first or last page. Use the single arrow icon to move one page at a time.

Manually key a new page number or items per page and click 'Go' and the screen will be updated accordingly.

Handheld Terminal

Startup Screen – Symbol AppCenter

Whenever the Handheld Terminal is reset or the Asset Management application is exited, the user will be presented with the following screen. The only option from this screen is to click the icon labeled 'SCS Asset Management'. This will start the data collection program on the handheld.
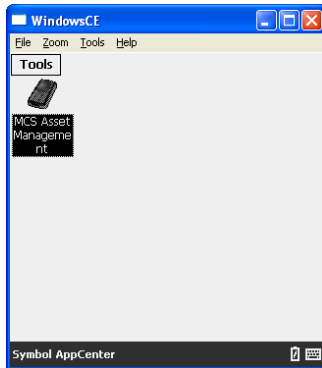
'Locked' Screen

When the handheld is ready for operation it will display the following 'Locked' screen. This is the normal 'home' screen for the data collection application. Clicking 'Exit' on this screen will return you to the 'Symbol AppCenter' screen above.

The handheld will remain at the 'Locked' screen until it is 'Unlocked' in the AMSI Web Application.
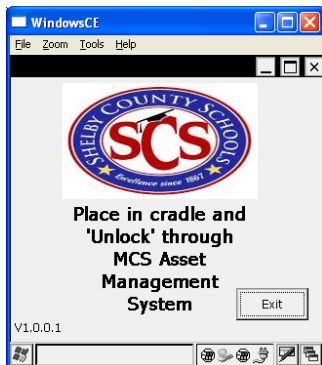
Standard Application Buttons

Most data entry screens have the following two buttons. Their use is always the same no matter what screen they are on.

 - Accept and validate the current data entered. If it is valid then save it and proceed to the next step in the process.

[Cancel] - Cancel the current screen and return to the previous screen. All previously saved data will remain saved and any current data in-process on the current screen will be lost.

Scanner DataEngine Screen

The Scanner DataEngine is the application that moves data from the handheld to the AMSI system database. This screen is provided for status purposes only. There is no user interaction through this screen. This application should start automatically every time your computer restarts.

Every time you put the handheld scanner in its cradle the Scanner DataEngine screen is displayed to show the status of the handheld connection and update.
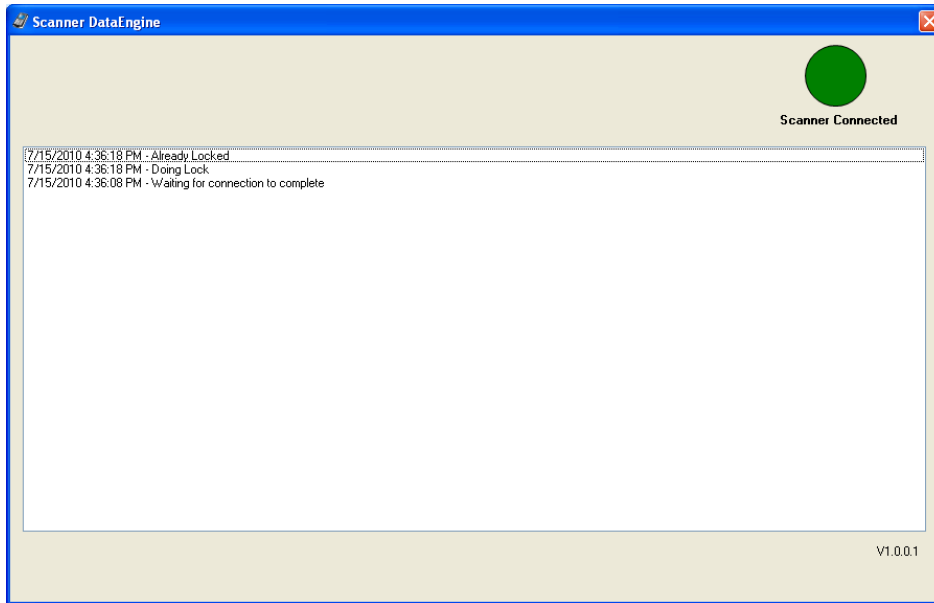
DataEngine Menu

A limited set of functions is available through the Data Engine's 'Scanner' icon in the system tray (lower right corner) of your PC's display.

Right click the Scanner icon to see a list of available functions:
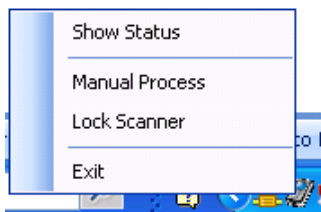
- Show Status – Displays the Scanner DataEngine screen to see the status of the application
- Manual Process – Used typically by IT Technicians to reprocess files. Clicking on this will typically not perform any function without the help of the school IT Tech.

- Lock Scanner – Normally the scanner will Lock and data will upload after being placed in the cradle. If for some reason this does not happen then click on 'Lock Scanner' to force the Scanner DataEngine to Lock the Scanner and upload its data.

The icon in the top right corner of the screen does not exit the application. It only closes the Status screen.

Microsoft ActiveSync

Microsoft ActiveSync is an application that is installed on your system so that the Scanner DataEngine application can communicate with the Handheld Scanner. Typically there is nothing to configure or do with ActiveSync. However, attaching any SmartPhone or PDA with a Microsoft operating system to a USB port can interfere with the operation of your Handheld Scanner.

Following are the two typical icons for Microsoft ActiveSync that are found in your system tray:

 - Gray Icon Color - Scanner is not connected to the PC

 - Green Icon Color - Scanner is connected to the PC. In this mode the Scanner DataEngine can communicate with the handheld scanner

Using the System

AMSI Web Application

Login

Enter your normal Windows User Name and Password in the AMSI Web App Login Screen. If you are authorized for access to the system you will be displayed the following Inventory screen. This screen allows you to view the Assets that are currently at your Location. Through the Menu Options you can view Scanned Transactions as well as control the Handheld Scanner.
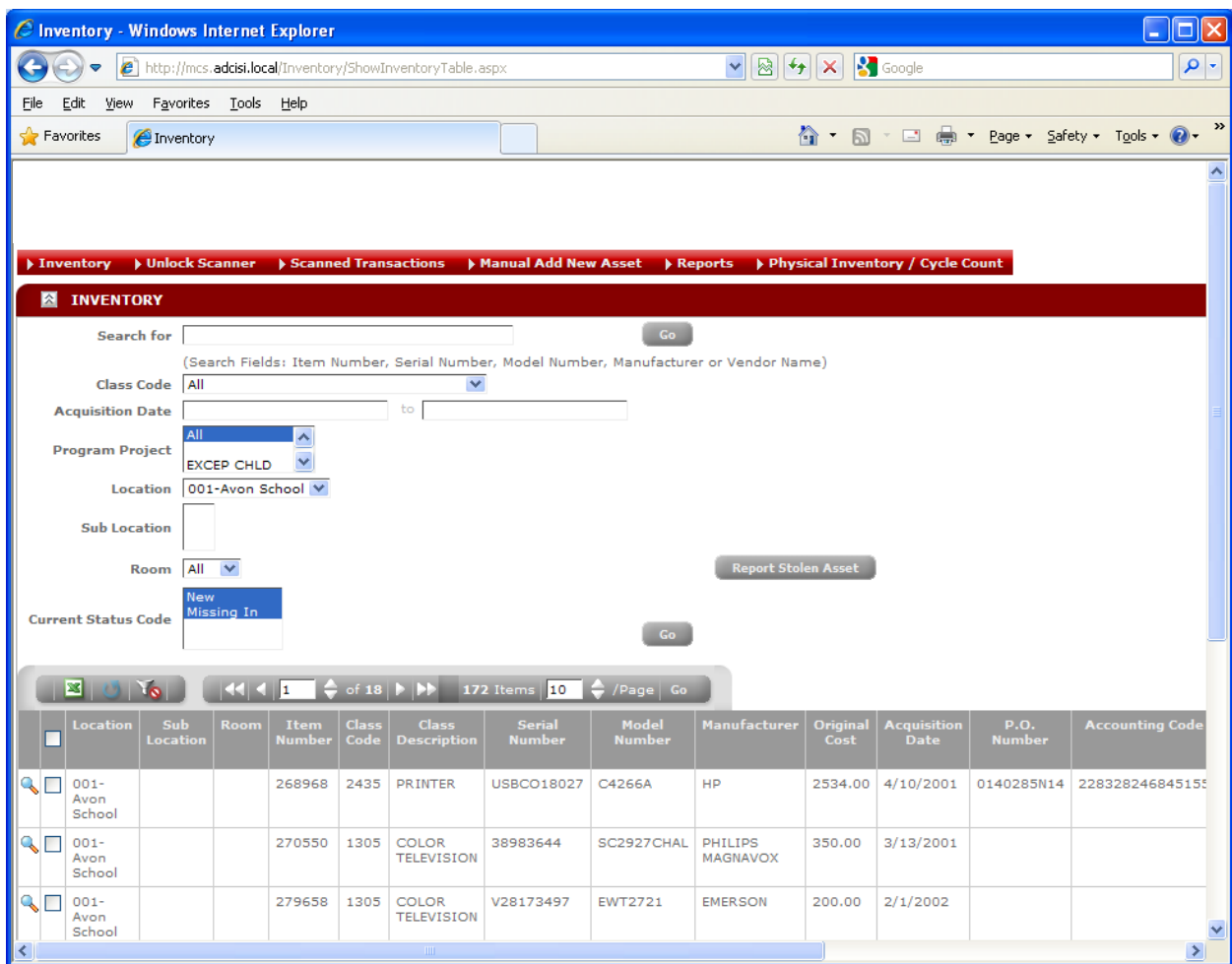
Logout

To Logout of the Web App scroll the browser if necessary to view the upper right corner of the current screen. You will find the 'Sign Out' area above your User Name:

You can either click the 'Sign Out' link or the Red Arrow icon. You will be redirected to the 'Sign Out' page.
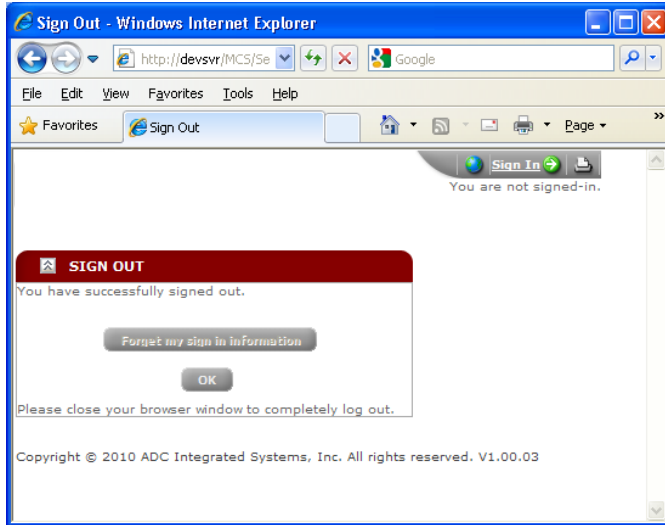
Clicking 'OK' takes you back to the 'Sign In' page for the next user to access the system.
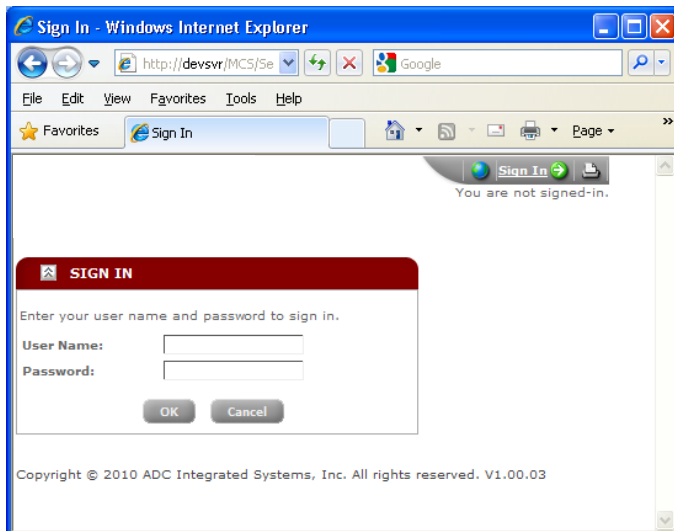
Unlock Scanner

To use the Handheld Scanner you must 'Unlock' it. Place the Scanner in its cradle and select 'Unlock Scanner' on the Admin Web App menu (second menu option). Next follow the directions displayed on the screen.
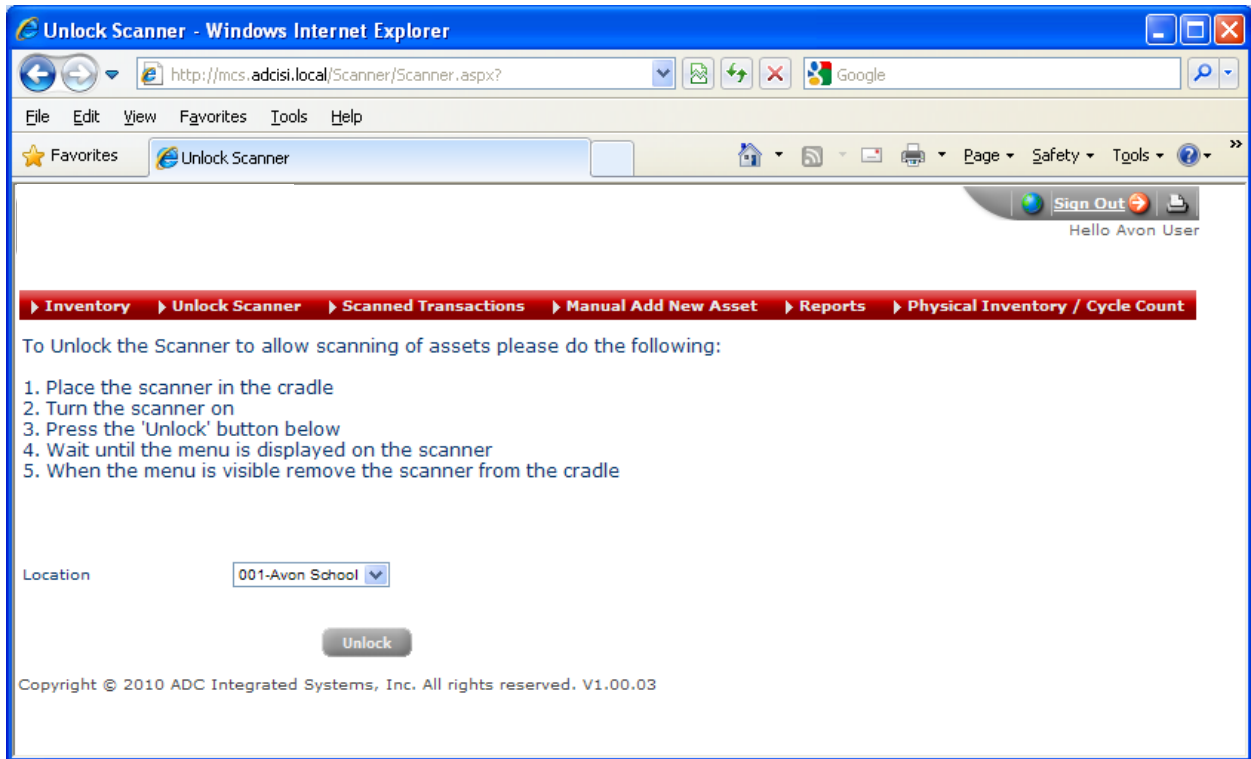
After the process is complete and the Handheld is unlocked then the Handheld should display the 'Main Menu'. Also notice that it will show your User Name at the top of the screen. Do not allow anyone else to scan with your User Name. To Logout of the terminal simply put it in the cradle and the system will automatically log you out and lock the terminal.

Process Transactions

Add (New) - Handheld

Click on the 'Add' button on the Handheld. Select a 'Purchase Method' and click 'OK'.
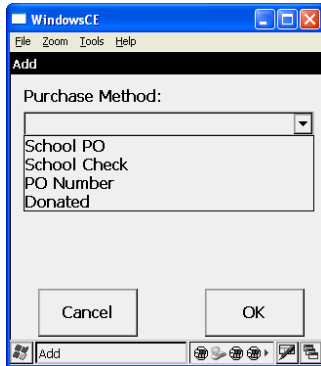
Add – Purchased

When adding new Assets that were purchased, the following screen will be displayed. Note that the first field's label will change depending on the Purchase Method selected. For our example below we will use 'School PO'. It would change to 'School Check' or 'PO Number' if those had been selected. Likewise the data validation for each Purchase Method is also different to insure you enter the proper data for each method.
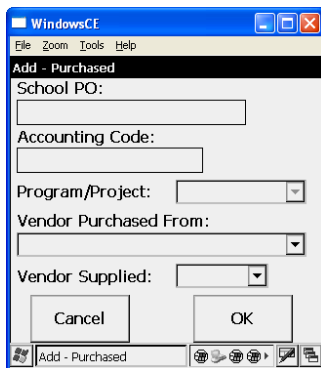
Enter the requested data:

- School PO
- Accounting Code

- Program/Project – depending on the Accounting Code you may or may not have to select a value for this field. Also, the Accounting Code entered will affect which values are available.
- Vendor Purchased From – Either select one from the list or enter the vendor name
- Vendor Supplied
  - Select 'Yes' if the Vendor has already attached an Asset Number to the item
  - Select 'No' if there is no Vendor attached Asset Number. One will be provided by the Office of Asset Administration.
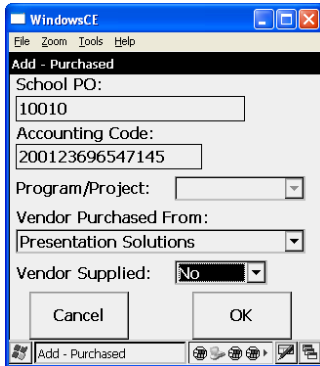
After entering the purchase information you will be prompted for details on the assets that have been purchased. If more than one of a particular asset type is purchased then enter the correct quantity. This will reduce the number of times you enter the Class Code, Model Number and Manufacturer.
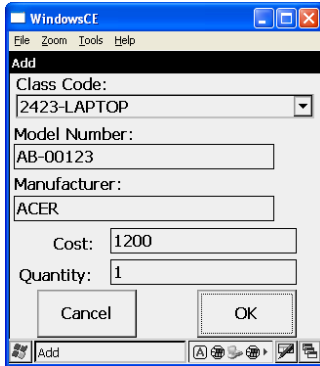
Scan or key the Serial Number for each Asset.
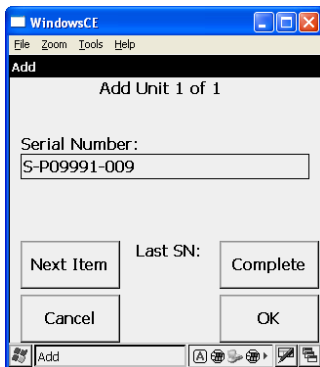
When all Serial Numbers for the Quantity purchased has been scanned or entered the Handheld will alert you.
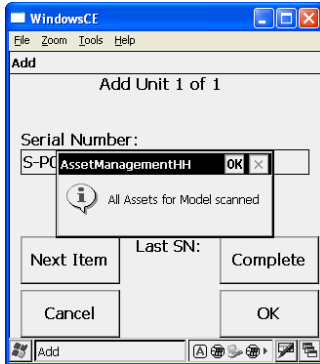
Click 'OK' on the message box or simply press 'Enter' on the keypad to be returned to the Serial Number scan screen. Choose your next option:

- Complete – All purchased items have been received.
- Next Item – Another purchased item is ready to be entered.
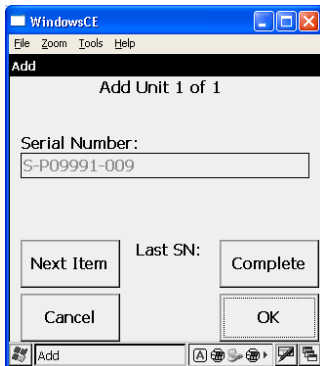
Add – Donated

After clicking 'Add' from the Main Menu, select 'Donated' as the Purchase Method. Click 'OK' or press 'Enter'.
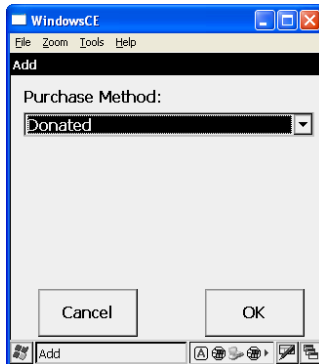
Enter the name of the person, company or entity that has donated the assets. Click 'OK' or press 'Enter'.
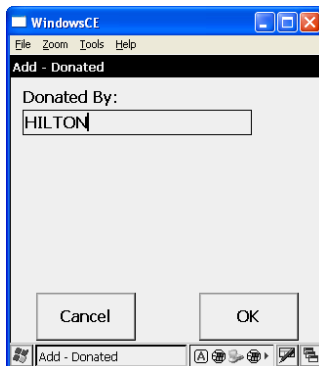
After entering the 'Donated By' information, you will be prompted for details on the assets that have been donated. If more than one of a particular asset type is donated then enter the correct quantity. This will reduce the number of times you enter the Class Code, Model Number and Manufacturer.

Scan or key the Serial Number for each Asset.
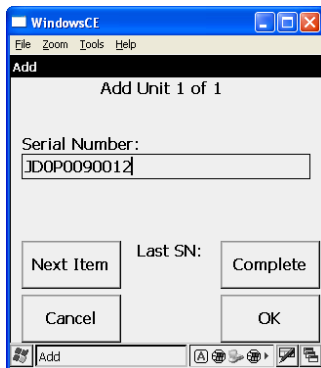
When all Serial Numbers for the Quantity donated has been scanned or entered the Handheld will alert you.
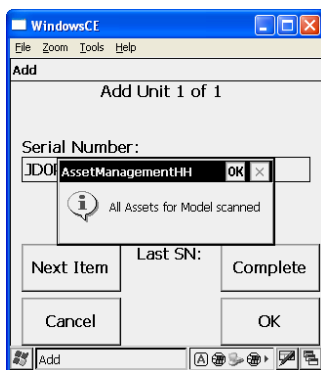
Click 'OK' on the message box or simply press 'Enter' on the keypad to be returned to the Serial Number scan screen. Choose your next option:

- Complete – All donated items have been received.
- Next Item – Another donated item is ready to be entered.

Upload and Process Add Transactions

Put the Handheld in its cradle. After about 15 seconds the handheld should return to the 'Lock' screen. At that point all the transactions should be uploaded and ready for review.

Select 'Unapproved Transactions' from the 'Scanned Transactions' menu options.

Review each Add transaction for completeness and accuracy. If you notice any issues please send an email to amsi@SCSk12.net and give details about the problem
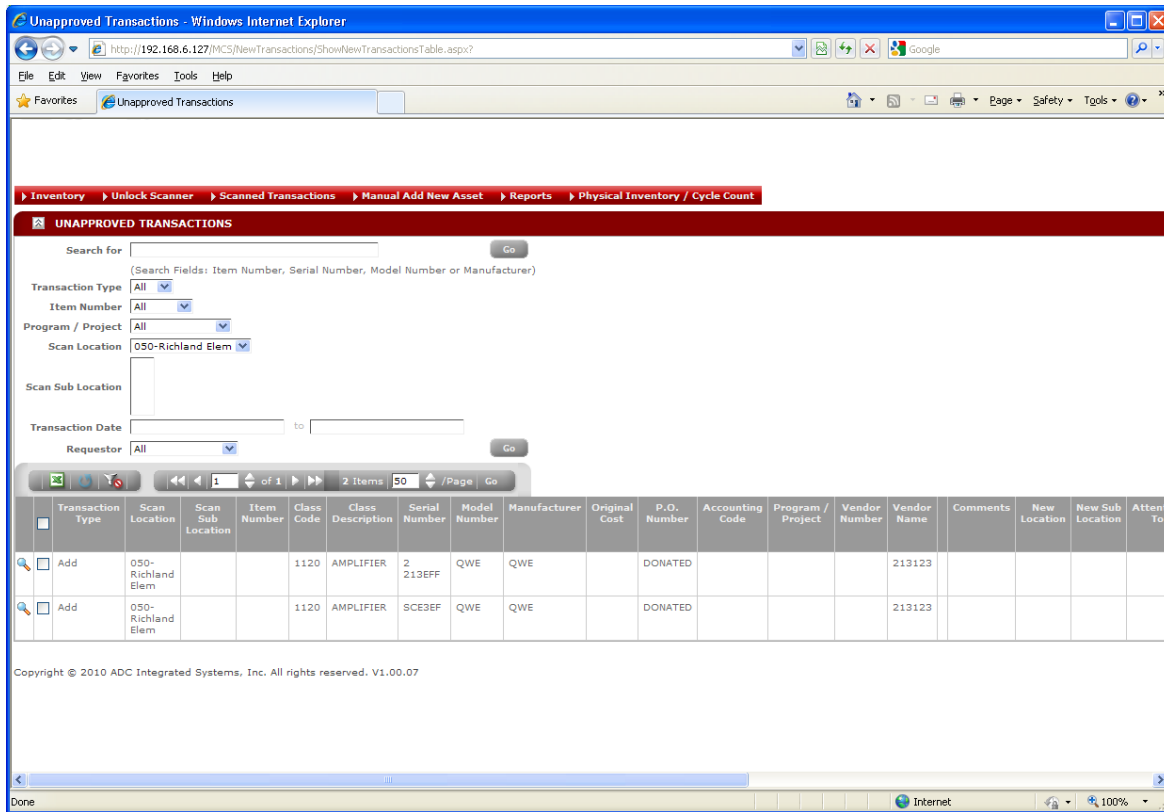
After the Office of Asset Management has approved your ADD transaction you can see that it has been moved to 'Incomplete Transactions'.
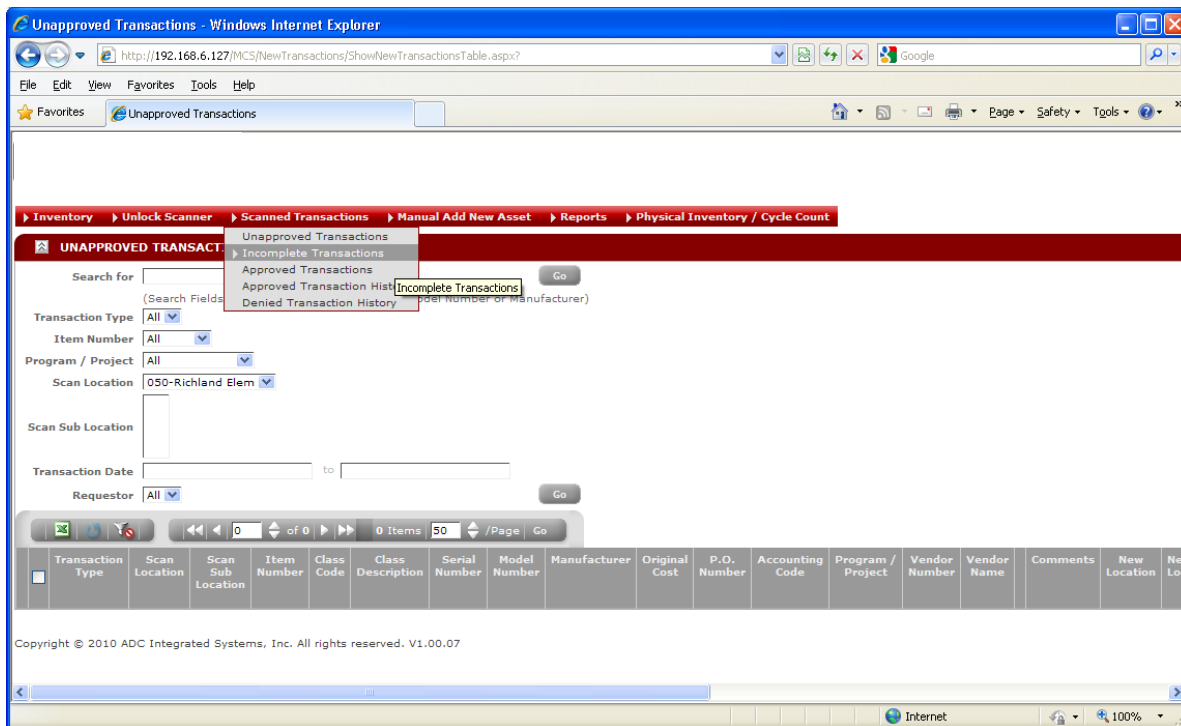
After selecting 'Incomplete Transactions' from the 'Scanned Transactions' menu, you will be taken to the Incomplete Transactions screen.

Add Transaction Data Flow

ADD Transaction → Upload from Handheld → Unapproved Transactions

Unapproved Transactions → Approved by Admin - Move NON Vendor Inventory to Incomplete Transactions awaiting Tag Confirm → Incomplete Transactions

Unapproved Transactions → Approved by Admin - Move VENDOR Inventory to Approved Transactions → Approved Transactions

Incomplete Transactions → Admin Selects Assets for Printing Tags → Asset Tags Printed

Add (New) – Admin Web Application

New Assets may also be added with the Admin Web Application. Click on the 'Manual Add New Asset' menu option and be taken to the 'Add New Assets' screen.

All data needed for the Add can be accomplished on this one screen.

Based on options chosen for each field, additional fields could become visible and others could be hidden. For instance, selecting 'Donated' as a Purchase Method removes the standard Purchase type fields from the screen and asks 'Donated By' for the Asset.
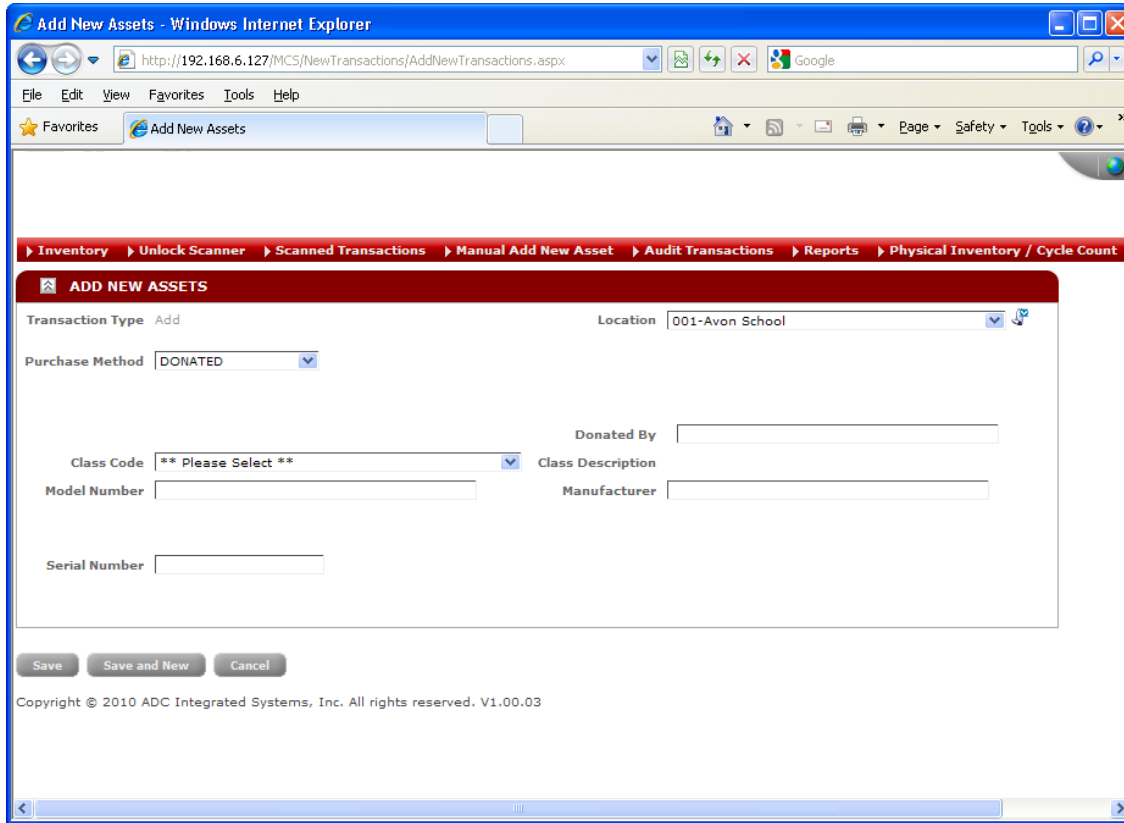
If the quantity of Assets being added is 1 then click 'Save' after you have entered all the data.
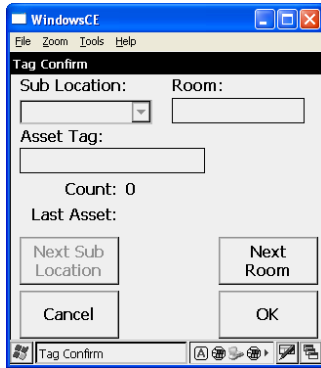
If the quantity of Assets being added is more than one then click 'Save and New'. The current Asset will be saved and the basic data will be kept so that only the new Serial Number (and possibly Item Number if it is Vendor Supplied) needs to be entered to Add the additional Assets.

Because this is online the New Assets are immediately stored in 'Unapproved Transactions' waiting for the Approval process exactly the same as with the Handheld. Please refer to 'Upload and Process Add Transactions' above to complete the process.

Tag Confirm

Tag Confirm is used when the Asset Tag has been delivered by the Office of Asset Administration and been affixed to the Asset. The Asset is not placed into inventory until the Tag Confirm process has been completed.
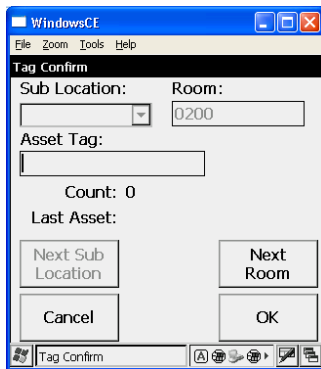
Click 'Tag Confirm' from the Handheld Main Menu. The Tag Confirm screen will be displayed.
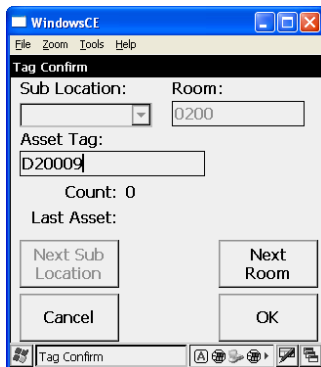
For most School locations there will be no Sub Location to choose from.

- If you do have options for 'Sub Location' then choose one and press Enter
- Enter the Room number that the Asset will be stored or used in

Scan the first Asset Tag being placed in that room.

The Handheld will show the Count of Assets scanned in that room. If you have additional new Assets being Tag Confirmed in this room then scan the next Asset Tag. To go to another Room, click the 'Next Room' button.
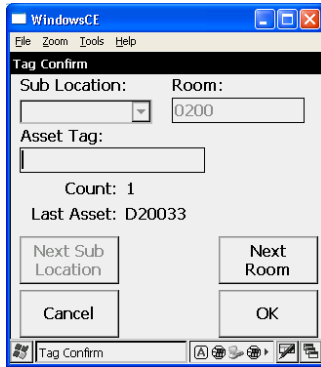
At this point enter the new Room. If you choose not to use a Room and just press Enter then the application will ask you to confirm that you want to 'Continue without a Room'. This is allowed but will cause your entire inventory to be grouped together. This will cause Cycle Counts and Physical Inventory to be more complicated.

After confirming 'Yes' to continue without a Room, scan the Asset Tags.
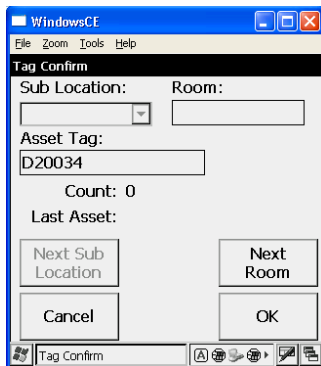
As with a Room defined, the Handheld will show a count scanned into 'No Room'.

Upload and Process Tag Confirm Transactions

At this point the Tag Confirm data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Selecting the 'Incomplete Transactions' screen will show the absence of our previous Add transactions for the Assets.
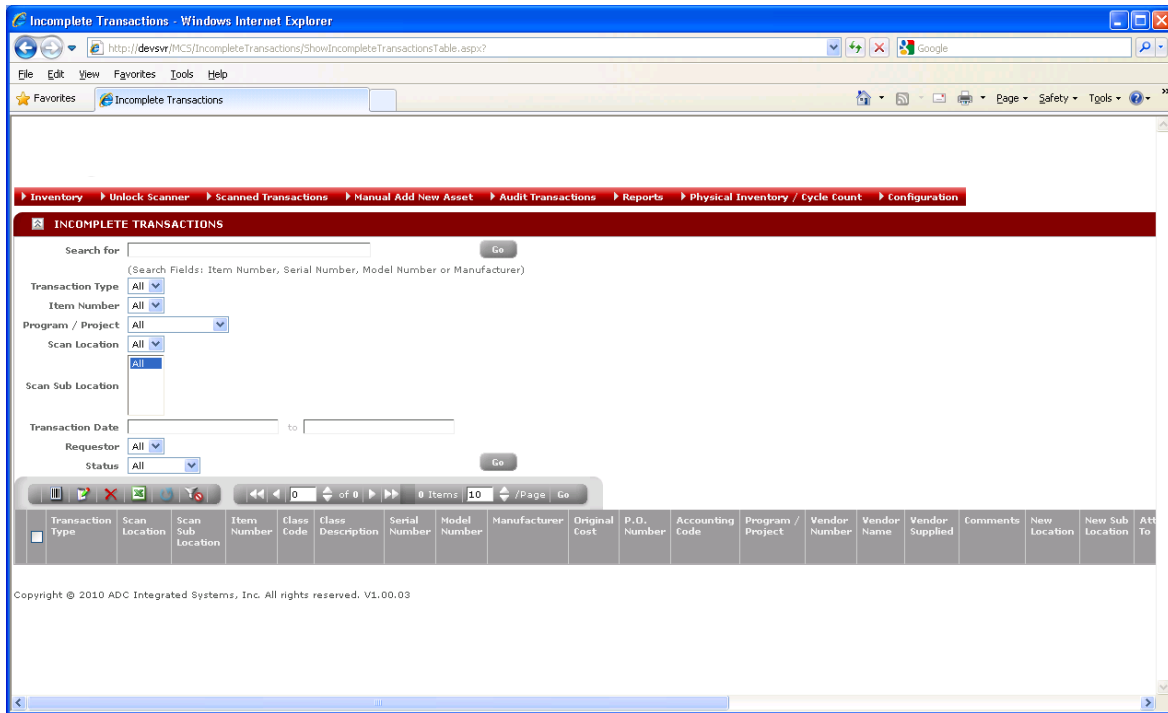
Click on the 'Approved Transactions' menu option from the 'Scanned Transactions' menu options. You can now see both the Add Transactions and the Tag Confirm Transactions. If the system finds Add Transactions that match the incoming Tag Confirm Transactions then no action is required on your part. But if there are invalid Tag Confirm Transactions they will be placed in the Unapproved Transactions list. They can be reviewed and your location will be notified of the error. At some point the error transactions will be Denied. Invalid transactions in the Unapproved Transactions list cannot be fixed and then Approved.

Tag Confirm Transaction Data Flow

TAG CONFIRM Transaction

Upload from Handheld

Matching Transaction for Asset In Incomplete Transactions?

YES - Incomplete ADD and TAG Confirm moved to Approved Transactions

NO

Unapproved Transactions - ERROR

Approved Transactions

Move

The Move Transaction is used to manage inventory at each individual Location. No approval of Move Transactions is needed by the Office of Asset Management. It is simply there to allow grouping of Assets in the system into the actual rooms they are stored or used in.

Whenever you move an Asset around your facility then record the Move with your Handheld.
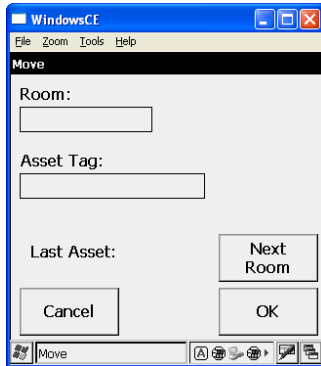
Scan or key in the Room number and then scan the Asset Tag.

You can scan multiple Assets after the Room as been entered. The Handheld will continue to prompt for Asset Tag until you click on 'Next Room' or 'Cancel'.

You can move an Asset from a Room to 'No Room' by leaving the Room prompt empty. The Handheld will ask for confirmation of 'Continue without a Room'.
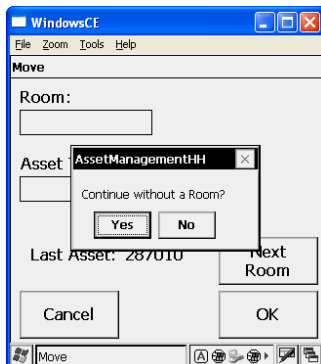
If you click 'Yes' then you will be allowed to scan 'Asset Tags' without a Room.
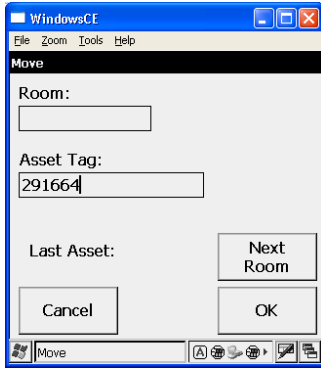
After the Asset Tag is scanned and saved in the Handheld it will display the Last Asset scanned. This is helpful if you get interrupted while scanning your Moves.
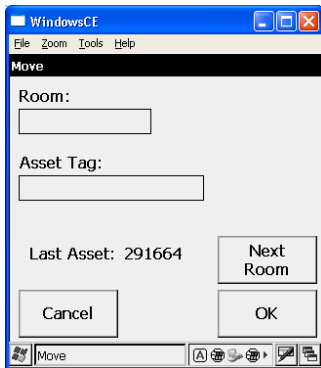
Upload and Process Move Transactions

At this point the Move data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Selecting the 'Approved Transactions' screen will show the Move Transactions for the Assets. But if there are invalid Move Transactions they will be placed in the Unapproved Transactions list. They can be reviewed and the Location notified of the error and then Denied. Invalid transactions in the Unapproved Transactions list cannot be fixed and then Approved.

Move Transaction Data Flow

```
  ┌─────────┐                                ◇
 (   MOVE   )   Upload from Handheld      Valid Move
 ( Transaction )──────────────────────▷     ◇
  └─────────┘
                                                        YES
                                    NO                   │
                                     │                   ▽
                                     ▽              ▽ Approved
                              ▽ Unapproved            Transactions
                                Transactions
                                - ERROR
```

Transfer Out

To transfer Assets from one Location to another you must do a Transfer Out transaction. Select 'Transfer Out' from the Handheld Main Menu.

Select a 'Transfer To Location' from the dropdown list. Then enter a 'Sub Location'. Most school locations do not have 'Sub Locations' so this would be left blank by pressing Enter. The Handheld will confirm the absence of a 'Sub Location'. Click 'Yes' to continue.

Enter the person who will be receiving the transfer in the 'Attention To' field.

After entering the 'Attention To' name and pressing Enter you are ready to scan Assets to be Transferred.
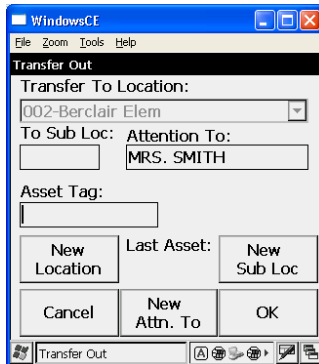
Scan your first Asset to Transfer.
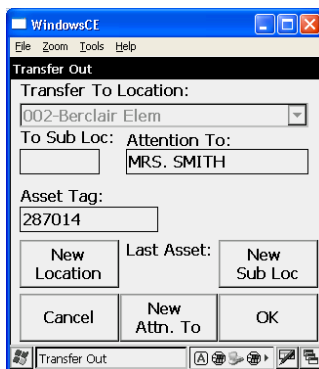
After scanning the Asset it will show under the 'Last Asset' label. This will assist you in continuing scanning if you get interrupted.

There are buttons available to change any of the following while you are processing your Transfers:

- New Location
- New Sub Location
- New Attention To

Each of these can be changed individually.

Upload and Process Transfer Out Transactions

At this point the Transfer Out data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Transfer Out Transactions must be approved by the Office of Asset Management.

All valid Approved Transfer Out Transactions will be removed from the Unapproved Transactions list and moved to the Incomplete Transactions list awaiting:

- Receive Transfer Transactions from the Receiving Location for the Transfer

Transfer Out Transaction Data Flow

TRANSFER OUT
Transaction

Upload from Handheld

Unapproved
Transactions

Approved by Admin -
Move to Incomplete
Transactions awaiting
TRANSFER RECEIVE

Incomplete
Transactions

Receive Transfer

When Assets are delivered to your facility by the Office of Asset Management as Transferred Assets you will use the Receive Transfer Transaction to complete the transfer to your inventory.

Select 'Receive Transfer' from the Handheld Main Menu
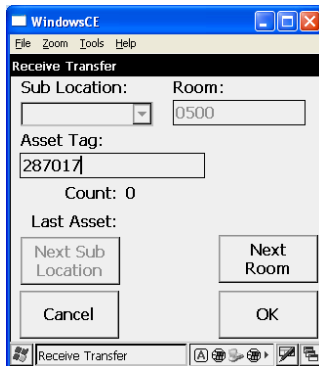
Enter your appropriate 'Sub Location' and 'Room' for the Asset. Then scan the Asset Tags being received.

The Handheld will count the Assets received into the Room and show you the Last Asset scanned.

While scanning Assets you may also choose to change either of the following:

- Next Sub Location – most users will be dealing with only one Sub Location if they even have it at all
- Next Room – helpful for inventory management to Receive the Asset to the Room it will be used in

Upload and Process Receive Transfer Transactions

At this point the Receive Transfer data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Selecting the 'Incomplete Transactions' screen will show the absence of our previous Transfer Out transactions for the Assets.

Click on the 'Approved Transactions' menu option from the 'Scanned Transactions' menu options to see the Receive Transfer Transactions. If the system finds Transfer Out Transactions that match the incoming Receive Transfer Transactions then no action is required on your part.   But if there are invalid Receive Transfer Transactions they will be placed in the Unapproved Transactions list. Invalid transactions in the Unapproved Transactions list cannot be fixed and then Approved.

Receive Transfer Transaction Data Flow

RECEIVE TRANSFER Transaction

Upload from Handheld

Matching TRANSFER OUT Transaction for Asset In Incomplete Transactions?

YES - Incomplete TRANSFER OUT and RECEIVE TRANSFER moved to Approved Transactions

NO

Unapproved Transactions - ERROR

Approved Transactions

Stolen

To report a Stolen Asset select 'Stolen' from the Handheld Main Menu. This cannot be processed until a Police report has been filed.

Key in the Police Report and press Enter.
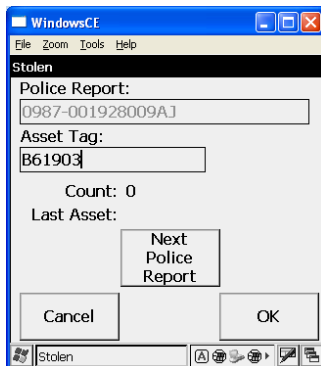
Key in the Asset Tag for the Stolen Asset and then press Enter. Note that the scanner is not functional for scanning the tag since it was attached to the stolen item.
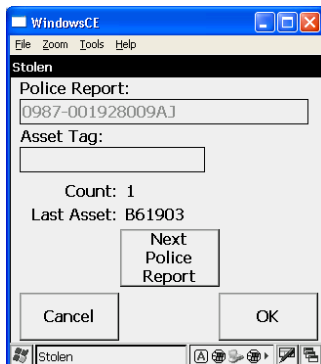
If there were multiple items reported on the same Police Report you can continue to enter additional Assets. The Handheld will keep count of the items and show you the last one entered. If you are processing multiple Police Reports at one time you can click on 'Next Police Report' and continue.

Upload and Process Stolen Transactions

At this point the Stolen data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Stolen Transactions must be approved by the Office of Asset Management.

Click on the 'Approved Transactions' menu option from the 'Scanned Transactions' menu to see the Approved Stolen Transactions.

Stolen Transaction Data Flow

STOLEN Transaction

Upload from Handheld →

Unapproved Transactions

Approved by Admin - Move to Accepted Transactions →

Accepted Transactions

Disposal Request

For an Asset to be disposed the Location must submit a Disposal Request. Select Disposal from the Handheld Main Menu.

There are three 'Reasons for Disposal'. Each will be reviewed separately.

- Traded
- Obsolete
- Damaged/Vandalized
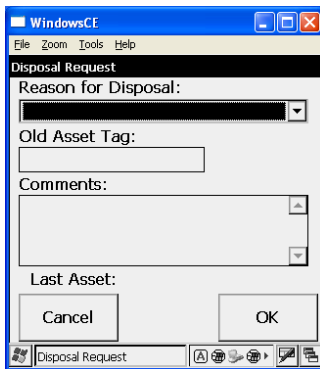
Disposal Request – Traded

Enter the following on the Disposal Request screen:

- Select 'Traded' and press Enter
- Scan the 'Old Asset Tag' being traded
- Enter the reason for the Trade in the 'Comments' field and press Enter
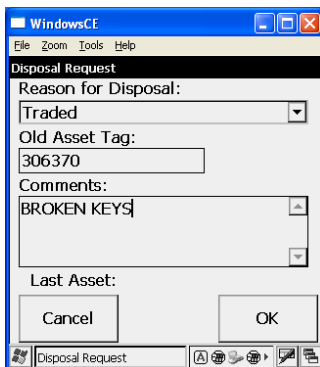
Because the Asset is being Traded the system requires information about the new Asset being put in its place. It first wants to know if the replacement is from a 'New Manufacturer'.

If you select 'Yes' to the question of 'New Manufacturer' you will be given the following screen to enter the 'Manufacturer' name.

After completing the question of 'New Manufacturer' you will be questioned about whether the replacement is a 'New Model' or not.
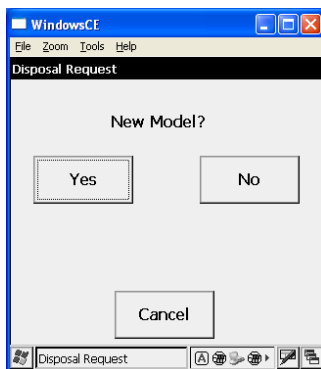
If it is a New Model click 'Yes' and you will be taken to the following screen to enter the Model.
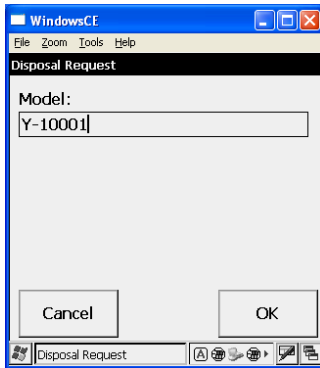
After completing the 'New Model' question you will be asked if the Asset is Vendor Supplied. This question simply means is the Asset already supplied with an Asset Tag from the Vendor.

If the Vendor has tagged the Asset with an Asset Number then click 'Yes' and you will be taken to the following screen to enter:

- Asset Tag – applied by Vendor
- Serial Number – this can be scanned if a barcode is available or keyed on the keyboard
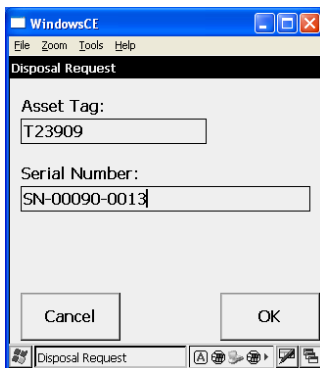
If the Asset was not 'Vendor Supplied' then the previous screen would not have asked for an Asset Tag, only the Serial Number.

After entering the Serial number the Handheld will go back for the next Asset Tag being Traded.
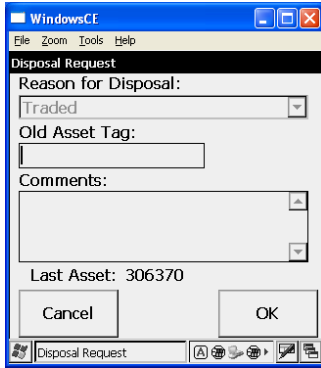
Disposal Request – Obsolete

Enter the following on the Disposal Request screen:

- Select 'Obsolete' and press Enter
- Scan the 'Old Asset Tag' being disposed
- Enter the reason for the Trade in the 'Comments' field and press Enter
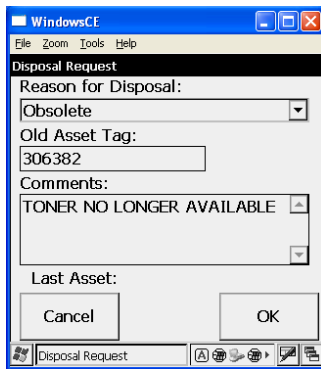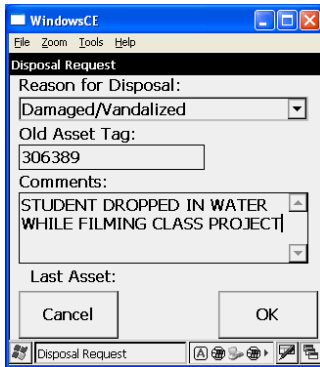
After entering the data requested the Handheld saves the Disposal Request and returns for the next Asset Tag to be disposed.
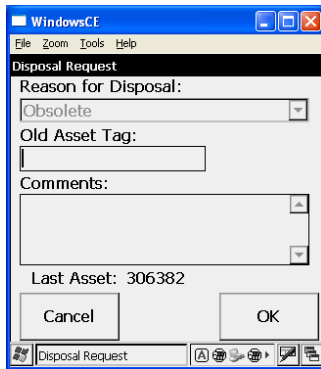
Disposal Request – Damaged/Vandalized
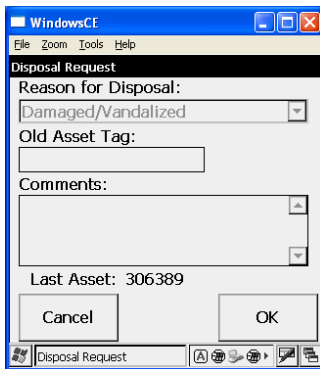
Enter the following on the Disposal Request screen:

- Select 'Damaged/Vandalized' and press Enter
- Scan the 'Old Asset Tag' being disposed
- Enter the reason for the Trade in the 'Comments' field and press Enter

After entering the data requested the Handheld saves the Disposal Request and returns for the next Asset Tag to be disposed.

Upload and Process Disposal Request Transactions

At this point the Disposal Request data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear. After the 'Lock' screen is displayed select 'Unapproved Transactions' from the 'Scanned Transactions' menu options.

Disposal Request Transactions must be approved by the Office of Asset Management.

All valid Approved Disposal Request Transactions for Obsolete and Damaged/Vandalized will be removed from the Unapproved Transactions list and moved to the Incomplete Transactions list awaiting:

- Disposal Receive Transactions from the Office of Asset Administration

For Traded items there is no other scan required if it was 'Vendor Supplied'. When an Asset is traded the old Asset is removed and a new one left in its place. Therefore the approved 'Vendor Supplied' transactions are moved to the Approved Transactions list. If the new Asset was not scanned as 'Vendor Supplied' then an Add transaction will be placed in the Incomplete Transactions awaiting Tag Confirm.

Disposal Request Transaction Data Flow

DISPOSAL REQUEST Transaction

Upload from Handheld

Unapproved Transactions

Approved by Admin

TRADE?

NO – OBSOLETE or DAMAGED/ VANDALIZED - Move to Incomplete Transactions waiting for matching DISPOSAL RECEIVE

Incomplete Transactions

YES

NO – Create Add Transactions waiting for matching TAG CONFIRM

NO

Vendor Supplied?

YES

NO – create Dispose Transaction

YES – create Dispose and Add Transactions

Approved Transactions

Approved Transactions

Reactivate

To put an Asset back into inventory that was previously taken out as Stolen, Missing or Scrapped then you would use Reactivate. Click 'Reactivate' at the Handheld Main Menu.

Enter the following values:
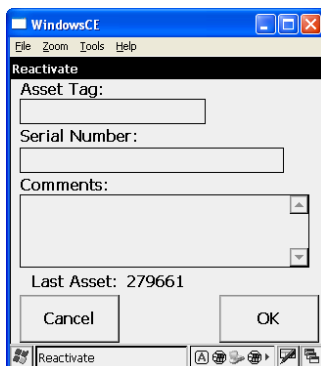
- Asset Tag
- Serial Number
- Comments – why this Asset is being reactivated

After the data is saved the handheld will clear the screen for the next Asset to Reactivate. The Last Asset entered is displayed near the bottom of the screen for confirmation.

Upload and Process Reactivate Transactions

At this point the Reactivate data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear.

Reactivate Transactions must be approved by the Office of Asset Management. Select 'Unapproved Transactions' from the 'Scanned Transactions' menu options.

Click on the 'Approved Transactions' menu option from the 'Scanned Transactions' menu options. You can now see the Approved Reactivate Transactions. But if there are invalid Reactivate Transactions they will be placed in the Unapproved Transactions list.

Reactivate Transaction Data Flow

REACTIVATE Transaction

Upload from Handheld

Unapproved Transactions

Approved by Admin - Move to Accepted Transactions

Accepted Transactions

Physical Inventory

The Physical Inventory transaction is used when you must count your entire Asset inventory. Click 'Physical Inventory' on the Handheld Main Menu.

If your Location does not have Sub Locations then Sub Location will be disabled. If you do have Sub Locations then select the proper Sub Location from the dropdown list.
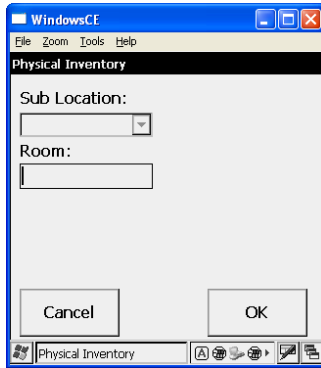
Enter the Room number you are counting in. If your inventory is not segmented by Rooms then you can press Enter without putting a value for Room. The Handheld will confirm that you want to 'Continue without a Room'.

Note: When you use Rooms during Physical Inventory, any Assets found in that Room will be updated in Inventory for that Room. So Physical Inventory is a great time to organize your inventory by Room while doing your count.
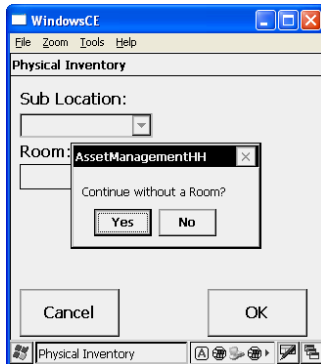
Now scan all the Assets in that Room.

As you scan 'Count' shows the number of Assets scanned in the current Room. 'Total' shows the total counted in all Rooms during this scan session. When the Handheld is uploaded it will reset the 'Count' and 'Total' values.

To go to the next Sub Location or Room simply press 'Cancel' to move back one screen.
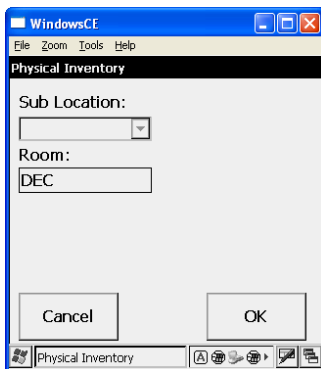
Since the Room has been changed you can see that 'Count' is now 0 and 'Total' is showing the count of the total Assets counted so far.

After the first Asset is scanned in the new location 'Count' and 'Total' are updated accordingly.

While counting in a Room press 'Missing' and a list of the uncounted Assets in that Room will be displayed. After reviewing the list click 'Cancel' to return to the scan screen.
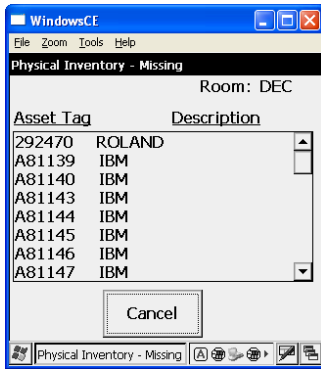
Upload and Process Physical Inventory Transactions

At this point the Physical Inventory data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear. You do not have to complete the whole Inventory before uploading. You can do a portion of your count and upload it before doing the rest of the count. You can also recount Assets with the scanner and upload again. The system will allow each scenario.

Physical Inventory Transactions are not individually approved. A Physical Inventory is Approved or Denied only after the Location has submitted it as Complete.

To review the Physical Inventory select 'Physical Inventory' from the 'Physical Inventory / Cycle Count' menu options.

Use this screen to review the progress of your Physical Inventory. By using the 'Status' filter you can select 'Missing' to find Assets that have not been scanned.

Validate Physical Inventory

During the Inventory click 'Validate Inventory' to see whether your Inventory Count is ready to submit for approval. The system will review several things:

- Missing Assets Count
- Other scanned transactions in process that are not complete

All normal transactions (i.e. Add, Transfer, etc) must be completed before a Physical Inventory can be completed.

Complete Physical Inventory

After you have found all Missing Assets and are ready to submit your Inventory for approval then click 'Complete Inventory'. Again the system will confirm that all Assets were counted and there are no other unfinished transactions in process. If so you will be notified with a message giving you details of what needs to be addressed.

When all transactions have been completed and the Inventory is Completed you will see the following message.
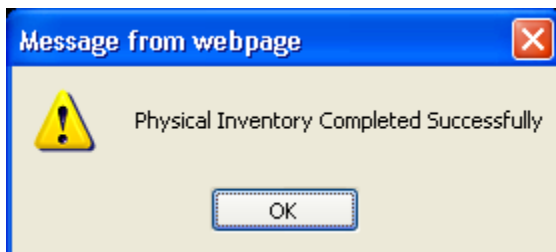
Approve / Deny Completed Physical Inventory

After the Physical Inventory has been Completed by the Location it is reviewed by the Office of Asset Management. While it is waiting for review it can be seen in 'Completed Physical Inventory'.

Physical Inventory History

After a Physical Inventory is approved for a Location it is stored in 'Physical Inventory History'. This can be viewed by selecting 'Physical Inventory History' from the 'Physical Inventory / Cycle Count' menu options.

On the following screen particular counts can be reviewed or exported to Excel as needed for further analysis. Summary information is also available:

- Total Assets
- Total Counted
- Total Missed (not counted)

Physical Inventory Transaction Data Flow

PHYSICAL INVENTORY Transaction

Upload from Handheld → Physical Inventory

Complete Inventory → Completed Physical Inventory

Approve or Deny Inventory

DENY – move transactions back to Physical Inventory

APPROVE

Physical Inventory History

Cycle Count / Audit

The Cycle Count transaction is used when you do a count of a subset of your Asset inventory. This is handy throughout the year to do spot checks on the accuracy of you inventory. It helps keep the inventory clean so that Physical Inventory has less reconciliation. Click 'Cycle Count / Audit' on the Handheld Main Menu.

If your Location does not have Sub Locations then Sub Location will be disabled. If you do have Sub Locations then select the proper Sub Location from the dropdown list.
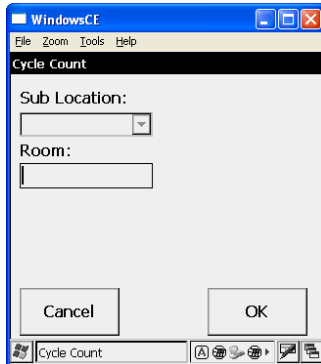
Enter the Room number you are counting in. If your inventory is not segmented by Rooms then you can press Enter without putting a value for Room. The Handheld will confirm that you want to 'Continue without a Room'.

Note: When you use Rooms during a Cycle Count, any Assets found in that Room will be updated in Inventory for that Room. So a Cycle Count is a great time to organize your inventory by Room while doing your count.
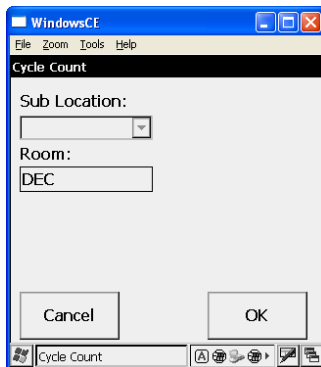
Now scan all the Assets in that Room.

As you scan 'Count' shows the number of Assets scanned in the current Room. 'Total' shows the total counted in all Rooms during this scan session. When the Handheld is uploaded it will reset the 'Count' and 'Total' values.

While counting in a Room press 'Missing' and a list of the uncounted Assets in that Room will be displayed. After reviewing the list click 'Cancel' to return to the scan screen.
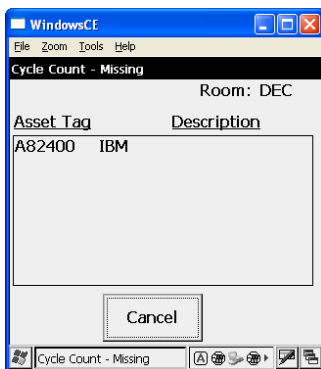
Upload and Process Cycle Count Transactions

At this point the Cycle Count data can be uploaded to the system. Simply place the Handheld in its cradle and wait for the 'Lock' screen to appear. You do not have to complete the whole Cycle Count before uploading. You can do a portion of your count and upload it before doing the rest of the count. You can also recount Assets with the scanner and upload again. The system will allow each scenario.

To review the Cycle Count select 'Cycle Count' from the 'Physical Inventory / Cycle Count' menu options.

Complete Cycle Count

After the Cycle Count is complete click on 'Complete Cycle Count' on the Cycle Count screen. The Cycle Count transactions will be moved to Completed Cycle Count and the following confirmation message will be displayed.

Completed Cycle Count

After the Cycle Count is completed by the Location it is moved to Completed Cycle Count. This can be viewed by selecting 'Completed Cycle Count' from the 'Physical Inventory / Cycle Count' menu options. There are no actions required on this screen. It is for historical viewing of previous Cycle Counts

Cycle Count Transaction Data Flow

```
    ⬭                                                ▽                                  ▽
CYCLE COUNT        Upload from Handheld        Cycle Count      Complete Cycle Count       Completed
 Transaction                                                                               Cycle Count
```

Reports

In the Admin Web Application, click 'Reports' on the main menu. You will be presented with a list of available reports. To run a report simply click on the report link in the list.
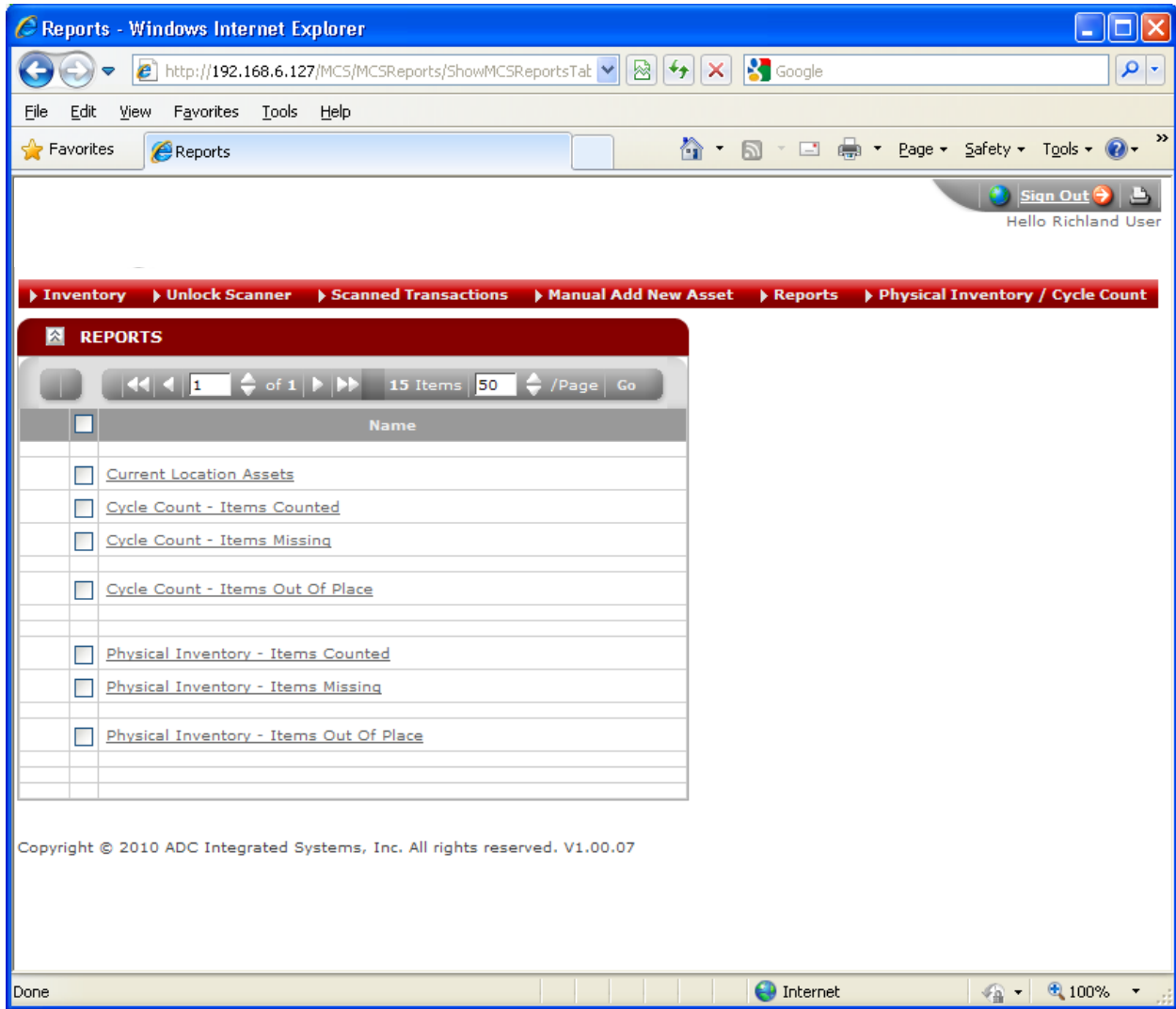
The report can also be 'Exported' to a file that you can save on your local computer. Simply click on the down arrow to the right of 'Select a format', select your desired file type and then click 'Export'.
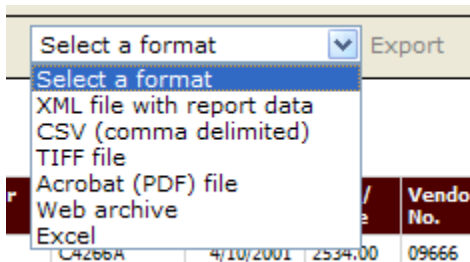
Current Report List

1. 'Current Location Assets' – Current Asset Inventory for a Location and Sub Location
2. 'Cycle Count – Items Counted' – Items that are in current Cycle Counts that have not been Completed
3. 'Cycle Count – Items Missing' – Items that were not found during the Cycle Count
4. 'Cycle Count – Items not At Proper Location' – Items scanned in the Cycle Count that were found at the wrong Location
5. 'Cycle Count – Items Out of Place' – Items scanned in the Cycle Count that were found in the wrong Room
6. 'Physical Inventory – Items Counted' – Items that have been counted in the current Physical Inventory
7. 'Physical Inventory – Items Missing' – Items that were not found during the Physical Inventory
8. 'Physical Inventory – Items not At Proper Location' – Items scanned in the Physical Inventory that were found at the wrong Location
9. 'Physical Inventory – Items Out of Place' – Items scanned in the Physical Inventory that were found in the wrong Room

Handheld Scanner Operation

The handheld scanner is a Motorola MC3000. It has been loaded with a custom application to collect data for the AMSI system. Data can be entered either on the keyboard or with the integrated barcode scanner. In some cases the scanner has been disabled when not appropriate for the particular input field. The keyboard is always enabled.

The handheld also has a touch sensitive screen for clicking on dropdown lists and buttons. There is an integrated stylus to touch the screen with. **CAUTION:** Do not use a sharp object such as a pen, pencil or metal tool to touch the screen. Doing so can damage the surface of the screen and render the touch screen inoperable.

Keyboard Data Entry

When the cursor is in an input field press the desired keys on the keypad followed by the ENTER key. All fields are accepted by pressing the ENTER key.

Scanner Data Entry

Please use caution with the integrated laser scanner. Under normal operating conditions it is completely safe. Do not stare directly into the laser scanner while pushing the scanner button.

When a field accepts scanned data you may activate the scanner by pressing the yellow 'Scan Button' on the face of the handheld or one of the 'Scan' buttons on the side of the handheld. The scanner will

illuminate its red laser beam as long as you hold a 'Scan Button'. When the scanner successfully decodes the barcode it will beep, display the data in the current input field and then turn the laser beam off.

To read a barcode simply aim the red laser beam at the barcode so that the beam passes from one end of the barcode to the other. If the beam does not pass completely through the barcode all at the same time then the barcode will not decode. It is not necessary to move the beam from top to bottom of the barcode. Simply hold the beam on the barcode and it should immediately decode. If the beam does not pass all the way from one side of the barcode to the other then the scanner might be too close to the barcode. For the AMSI Asset Tag the typical distance required between the barcode and the scanner is 5 to 10 inches.

Warm Boot Scanner

On occasion when the handheld does not appear to be operating correctly, you my try to reset it by doing a 'Warm Boot' on the scanner.

1. Press and simultaneously hold **7**, **9** and **Power**. Do not hold down any other keys or buttons.
2. As the mobile computer initializes MC3000 demo window appears.

Cold Boot Scanner

If the scanner stops responding to all input and a 'Warm Boot' does not correct the issue you may try a 'Cold Boot'.

1. Simultaneously press and then release the **1**, **9** and **Power** keys. Do not hold down any other keys or buttons.
2. As the mobile computer initializes, the splash window, below, appears for about a minute.

3. Calibrate the touch screen

Calibrate the Touch Screen

1. Remove the stylus from the stylus holder.
2. Carefully press and briefly hold the stylus tip on the center of the **Calibration** screen target. Repeat the procedure as the target moves and stops at different locations on the screen. This enters the new calibration settings.

Carefully press and briefly hold stylus
on the center of the target.
Repeat as the target moves around
the screen.
Press the Esc key to cancel.

+

New settings have been measured.
Press the Enter key to accept.
Press the Esc key to discard.

3. Once all of the new calibration settings are input, tap the screen or press the **ENTER** button to save the new calibration settings. Press **ESC** to discard the new calibration settings.

MC3000 Quick Start Guide

MC3000 Series — Recommended Usage Guide