Cycle
Count

HHT Guide

Version 2.6.7

This document is intended for use
By End users and Supervisor/Managers

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Change Record

Date	Author	Version	Change Reference
7/18/2008	D. Baxter	1.0	.Net Version Release
12/10/2010	R.Hatt	2.6.6	New Release
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4/30/2013	R. Hatt	2.6.7	Initial Release

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AtPar Login Screen

The @Par Hand Held Terminal (HHT) device login screen can be accessed when users are set up by their @Par Administrator or Supervisor. @Par Version information is displayed on the login screen. The Remember Me checkbox will retain the user id information of the user who last used the HHT. This will require only the entry of the password for that user.

The keyboard should appear automatically upon access to this screen. This allows users' easy access to type in their information. If the keyboard doesn't appear tap the icon in the bottom center of the login screen.

Enter your **Login Name** and **Password** and ***TAP*** the Login button **Figure 1**.

Figure 1

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AtPar Apps Screen

Based on the applications assigned to the client user by the administrator or supervisor the screen below appears for access to an @Par product or products **Figure 2**

Figure 2

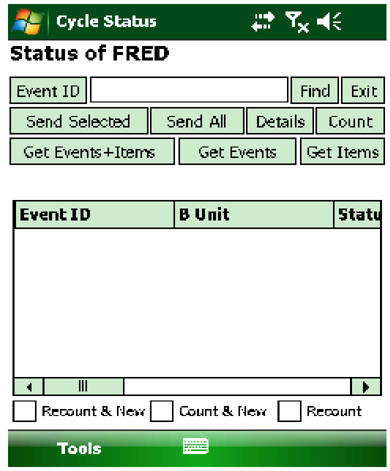

Figure 3

Upon successful login If the user only has access to the **@Par Cycle Count** the user will move automatically to the **Cycle Status** screen, shown in **Figure 3.** If the user has more than one **@Par** product the icons will appear in **Figure 2** for user to choose which application to use.

The **Cycle Status** screen is the main screen and is used to download events and items as well as send data to the ERP server upon completion of counts.

The actual counting is done on the **Item Counts** screen. This will be explained later in the document.

To get started ***TAP*** the **Cycle Count** icon. This will launch the module and you will see the **Cycle Status** screen which is the primary application screen ***Figure 3***.

Cycle Status - Buttons & Fields Explanations

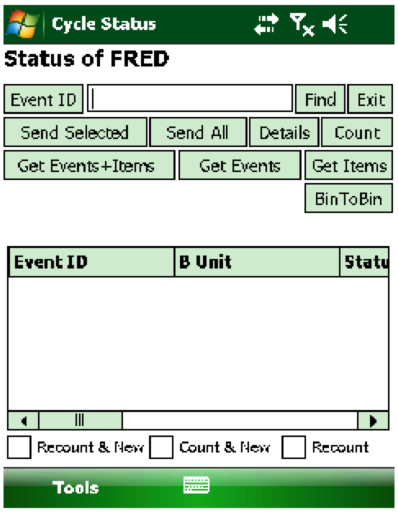

Figure 4

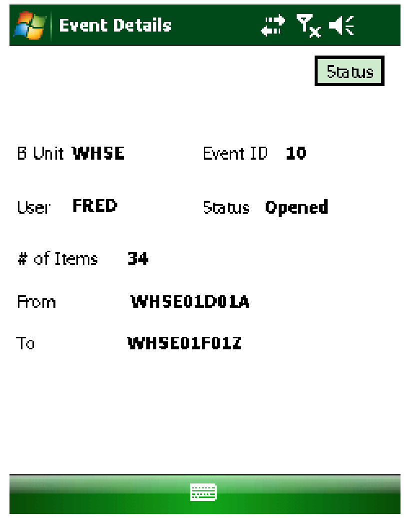

Figure 5

Event ID – This function can be used to quickly find an Event that has been downloaded to the HHT. First ***enter*** the **Event ID** and ***TAP*** the Find button.

Find – Find is used to “Find” counting events that have been downloaded to the HHT. Enter an **Event ID** then ***TAP*** the Find button. The **Event ID** will appear, **highlighted**. If the **Event ID** entered is **not** downloaded to this HHT, then user will receive the screen message shown in red, “Event not found”

Exit – This option will exit the **Cycle Count** Application.

Send Selected – This option is to send an event that is in **COUNT** status and highlighted

NOTE: Any event must be in **COUNT** status to be uploaded

Send All – This option is used to send an event or events that are in **COUNT** status but will send ALL events. Selecting a single event is not required.

Details – ***Highlight*** an event and ***TAP*** this button to display information regarding the event. See **Figure 5**.

Count – ***Highlight*** an event with a status of **DOWNLOAD** and ***TAP*** this button to perform a count on that event.

Get Events+Items – This option will download all the **Events and Items** to the HHT

Get Events – This option will download **Event headers** only. (No Items)

Get Items – This will download the item details for a ***highlighted*** **Event**.

BinToBin - If your organization has purchased the Bin to Bin product users have the ability to do a Bin to Bin transfer by using this option

– This option is used to download new event and items in addition to an event with items flagged for recounting. See the Recount & New section later in this document.

– This option is used to download new events and items in addition to any events that have already been counted. See the Count & New section later in this document.

- This option is used to download only events with recount items flagged. See the Recount section later in this document.

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Cycle Item Counts - Buttons & Fields Explanations

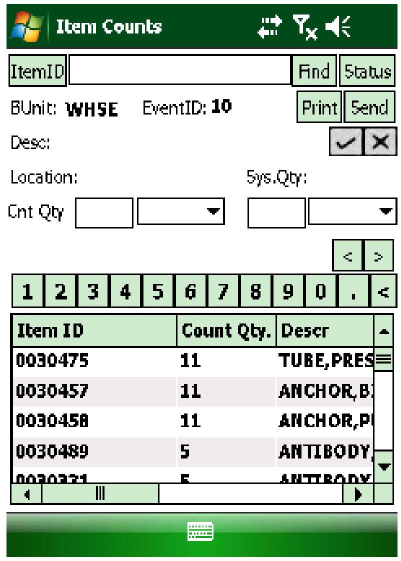

Figure 6

- The Item Id field is a "Toggle Switch" which allows a user to switch between fields to scan bar codes. For example, the @Par Administrator or Supervisor has set up this button to toggle between Item ID and Manufacturer's Item ID. When the user ***TAPS*** on this button, the 

button will appear.

The purpose of the toggle is to provide a user with the ability to scan multiple bar codes in the same field. If you normally scan the Item ID bar code but the label is not available, you can use the toggle to switch to scan the Manufacturer's Item ID bar code.

Available toggles for the Item ID are:

- **Container ID**
- **Count Qty 2**
- **Bin/Compartment**
- **Count Ord**
- **Description**
- **GTIN**
- **Custom Item**
- **Item ID**
- **Item Number**
- **Lot ID**
- **MFG Item ID**
- **Serial ID**
- **Storage Loc**
- **Storage Area**
- **Storage Level 1**
- **Storage Level 2**
- **Storage Level 3**
- **Storage Level 4**
- **Tag ID**
- **UOM 2**
- **UPC ID**
- **Vendor Item ID**

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NOTE: All Toggle fields must be set up by @Par Administrator or Supervisor in the Screen Display setup found in Manage Profiles.

- This option is used to find an item on the HHT that has been downloaded but may not be visible in the grid on the HHT. Enter the Item ID and ***TAP*** this button. If the Item exists on the event, it will be highlighted in the grid and brought to your item display for counting. If Item ID is **not** on the even, the following message will display -"ItemID not found".

This button returns the user to the Cycle Status screen.

Highlight an item and ***TAP*** this button to print a replacement barcode label if needed

This button sends data to the ERP system from the Item Counts screen for processing (In a Wireless Environment or if HHT is docked).

These two buttons allow forward and back movement through all the items in the list of values or grid.

Default input buttons will appear if following profile parameter is set by the @Par Administrator or Supervisor.

Default Input	☑	[Checking this will default the Counts for user]

This button inputs the System Quantity on hand value into the **Count Qty** field for all items in the list.

This button removes all counts from the **Count Qty** field.

NOTE: It is **highly recommended** organizations **DO NOT** use the Default Input feature

If the following profile parameter is checked by the @Par Administrator or Supervisor the **Item Counts** header screen will appear as in **Figure 7** – Unchecked screen will appear as in **Figure 8**

Counting in 2 different UOMs	☑	[Checking this will enable the user to count in 2 different UOMs]

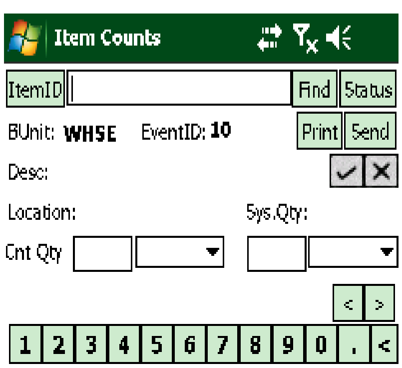

Figure 7

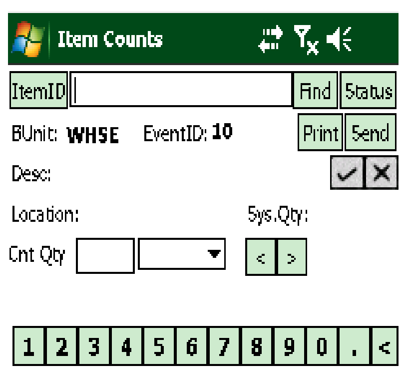

Figure 8

The parameter will allow a user to count an item by an alternate unit of measure

When the following profile parameter is checked, **the Item Counts** header screen will display as in **Figure 9**. Unchecked screen will display as in **Figure 10**

Display alternate UOM s for an Item	☑	[Checking this will enable users to select an alternate UOM for an item at the item cycle/physical counting]

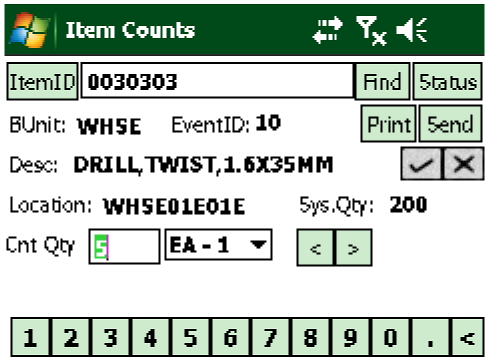

Figure 9

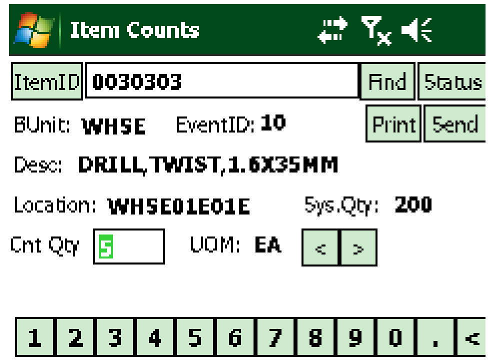

Figure 10

In **Figure 9** the UOM is a drop down list where user can select an alternate UOM to select. **Figure 10** only displays the primary UOM

If the following profile parameter is checked the system quantity (**Sys.Qty**) field displays in the Item Counts header screen as in **Figure 10**. This is highly **NOT RECOMMENDED** as when performing a physical or cyclical count the user should do a blind count.

Display Sys Qty value	☑	[Checking this will display Sys Qty value of the item, Un checking will allow the user to do Blind Counting on the item screen. Assumption: System Qty column in Screen]

Generally the @Par Administrator or Superviso will check the following profile parameter which allows users to sort the data in the LV or grid by ***TAPPING*** on the column name.

Sort By Column	☑	[Checking this will allow the user to sort the columns on the HHT]

If the following profile parameter is selected it will require entry of the Count Qty field for all items on an event

Count all items	☐	[Checking this will force the user to count all items]

The following soft input keyboard is available when @Par Administrator or Supervisor selects the following org group parameter

Display of Soft Input Panel (Keypad) for numeric	☑	[Checking this will automatically display the Soft Input Panel (Keypad) for numeric on Item details screen]

1 2 3 4 5 6 7 8 9 0 . < The keys can be used instead of the keyboard by the user to enter count quantity. This provides the user a better view of the HHT screen.

How to Count Events

As in other @Par products users must first get the data onto the HHT. Once data is downloaded users can start to count events.

NOTE: Users can download multiple events but can only count one event at a time

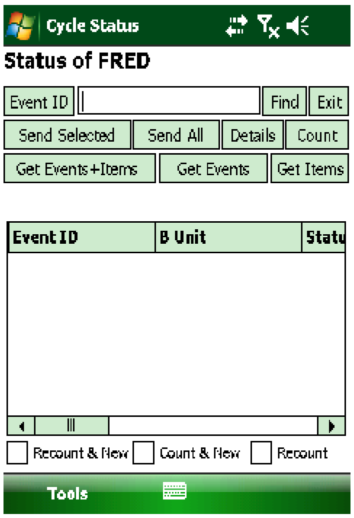

Figure 11

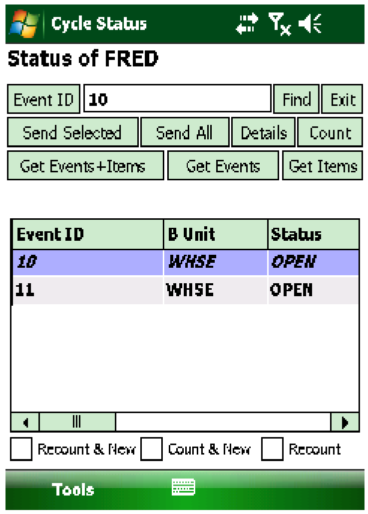

Figure 12

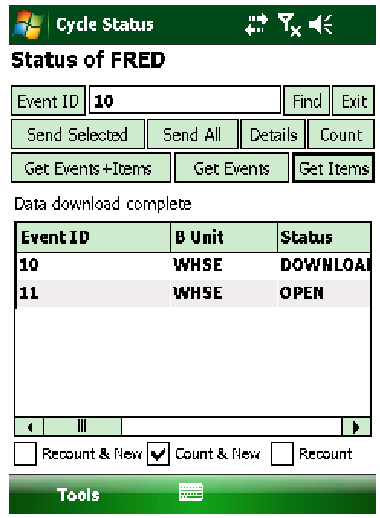

Figure 13

Users can get the data using one of two processes:

1. ***Click*** the Get Events button which downloads Event headers only in OPEN status as in **Figure 12**. Once Event header is downoaded the user then highlights an Event and ***clicks*** the Get Items button. This downloads all items associated with the event to DOWNLOAD status **Figure 13**.
2. ***Click*** the Get Events+Items button and Event header and items download to the HHT in DOWNLOAD STATUS. **Figure 14**

NOTE: If the supervisor has used the Split Event functionality when users download the displays in **Figure 15** and **Figure 15** may appear. The counting process is still the same

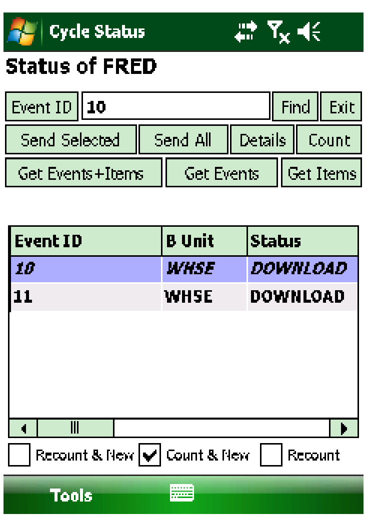

Figure 14

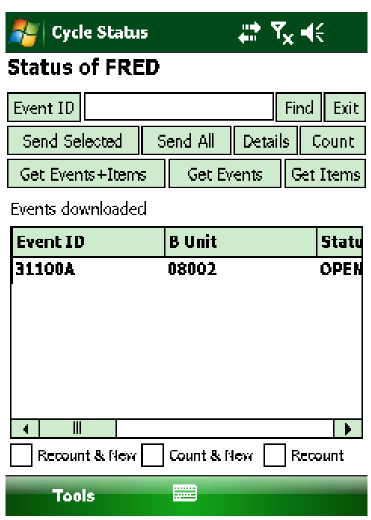

Figure 15

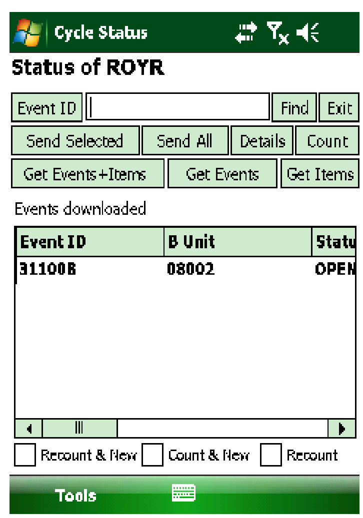

Figure 16

Some organizations will utilize Split Events to easily divide larger events into smaller, more manageable events to allocate to multiple users. For example, an event may have 1600 events which the supervisor understands will be too big for one user to count. They will divide the event into two or more smaller events which will add an alphabetic letter at the end of the original event.

The supervisor then allocates A and B to different users to download and count the items.

NOTE: There are four Statuses for Cycle Count.

1. **DOWNLOAD –** Signifies that the Event ID and items have been downloaded from the main production server to the HHT.

2. **OPEN –** Signifies that the Event headers have been downloaded to the HHT without items.

3. **SENT –** This status is rarely seen by the User. It flashes quickly but literally means that the Event has been sent. After a successful send the information is removed from the HHT.

4. **COUNT –** Signifies that this Event has been completely or partially counted.

User will ***highlight*** the event to count and ***click*** the Count button **Figure 17**

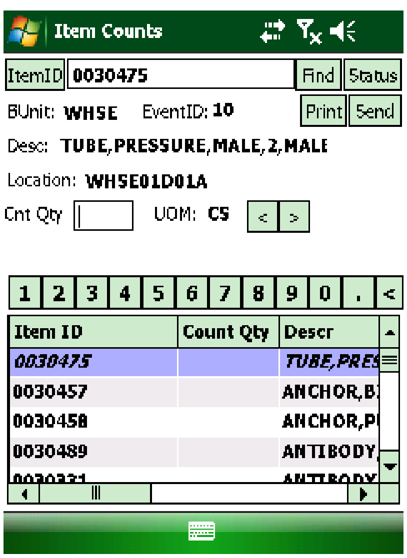

Figure 17

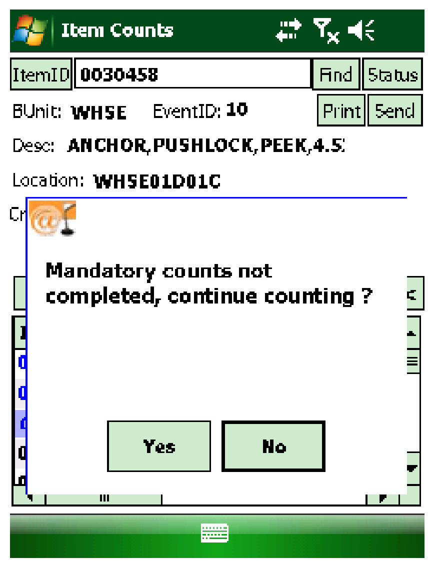

Figure 18

There are four methods to navigate **Item Counts** screen are:

1. Manually **enter** the **Item ID** and ***TAP*** the Find button.
2. Use the **UP/DOWN** scroll bar on the right of the screen
3. Use the < > buttons to move up and down the list of items.
4. ***Scan*** the bar code item id label

User enters the item count in the "**Cnt Qty**" field and continues until they are done counting. If the user is required to count all items but misses an item and clicks the button to return to the **Cycle Status** screen the message in **Figure 18** appears

TAP on the Yes button to continue counting all items.

TAP the button to go to the **Cycle Status** screen without completing counts.

If the user ***clicks*** the Send Selected button or the Send All button from the **Cycle Status** screen without all items being counted the screen in **Figure 19** appears

If the user **click**s the Send button from the Item Counts screen without all items being counted, the screen in **Figure 20** appears

Figure 19

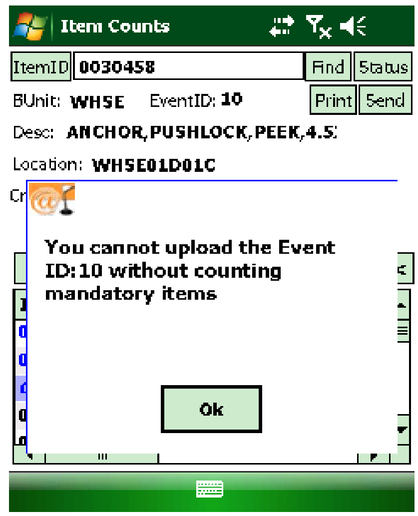

Figure 20

When items are ready to be sent users can ***click*** the Send button from the **Item Counts** screen which sends the data immediately. If users ***click*** the Status button to return to the Cycle Status screen the following screen appears **Figure 21**

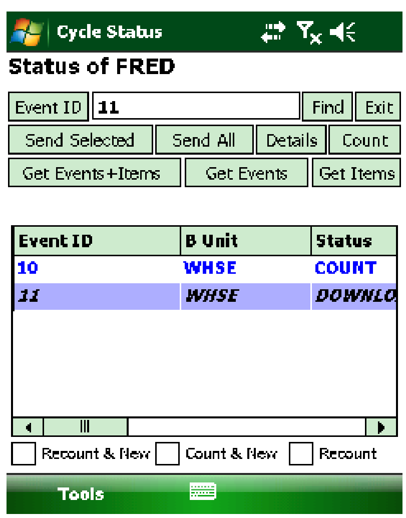

Figure 21

NOTE: Users in a wireless environment can send at any time. Users in nonwireless environement must be docked in a network cradle.

After successful sending of data the information will no longer be available on the HHT device. Until the data has been sent the information is available for users to use and count.

During navigation on the Item Counts screen users may see the following message in **Figure 22** and **Figure 23**

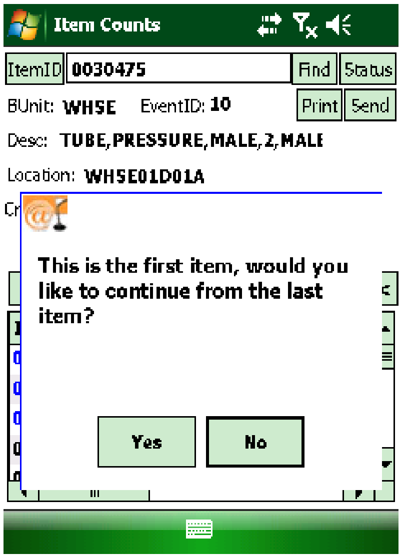

Figure 22

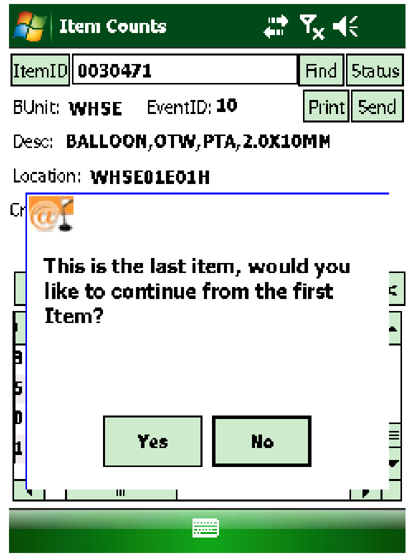

Figure 23

Figure 22 indicates user has arrived at the **first** item on the event.

TAP the  button to continue from the **first** item on the event.

TAP the  button and the popup disappears and user can continue or finish.

Figure 23 indicates user has arrived at the **last** item on the event.

TAP the  button to continue from the **last** item on the event.

TAP the  button and the popup disappears and user can continue or finish

The following org group parameter is very important to the process and workflow.

Review item counts	☑	[Checking this will allow review process for the counts before sending them to the enterprise system]

.

If the parameter is unchecked, HHT users are done. The data has been sent and gone directly to the ERP system.

If the parameter is checked it will allow supervisors to review the counts on the @Par Web pages before sending the data to the ERP system. This will also allow the ability for supervisors to flag items for recounting on the HHT, which is covered next in the document.

HHT Recount and Counts

Recounting is an option that is set by the Supervisor or @Par Administrator. The setting will determine if recounting items on a counting event can be performed on the HHT.

With this functionality the following three processes can be accomplished.

The ☐ Recount & New ☐ Count & New ☐ Recount check boxes are found at the bottom of the Cycle Status main application screen.

Recount and New:

After sending a counted event from the HHT, the supervisor may review the counts on the **@Par** server and require an item or items be recounted, this is called a recount. The manager might notice an item that shows a count quantity of 50 on hand but the count by the user for this item is 1500. This would be a good example as to why the manager would ask for a recount.

To recount the user will ***check*** the ☐ Recount & New checkbox, ***enter*** or ***highlight*** the **Event ID**, and ***TAP*** the [Get Events+Items] button. This will download only those items your manager has requested be recounted and any new items added to the event that hadn't been counted before.

The process now is same as when counting the event initially. User counts the items and when done sends to the server. The supervisor can now review the new counts on the **@Par** Web page.

Counted and New:

To count events that have been counted the user will ***check*** the ☐ Count & New checkbox which will allow users to download **Events** again. This option would be used by the supervisor to have a user download any item that has been counted before and any new items added to the event.

User will **click** the [Get Events+Items] button and download all items that were already counted as well as any new items associated with the **Event ID.**

Recount:

This option is similar to the Recount and New option but only downloads items on events that have been flagged as RECOUNT. No new items will download with this checkbox checked.

To recount the user will ***check*** the ☐ Recount checkbox, ***enter*** or ***highlight*** the **Event ID**, and ***TAP*** the [Get Events+Items] button. This will download only those items your manager has flagged as RECOUNT

The process now is same as when counting the event initially. User counts the items and when done sends to the server. The supervisor can now review the new counts on the **@Par** Web page.

Session Expiration

You will receive the popup message below (**Figure 24**) if you have exceeded the idle time allotted to you by the @Par Administrator. The @Par Administrator manages the HHT and login idle times and if you are experiencing frequent expiration message ask them to increase this setting.

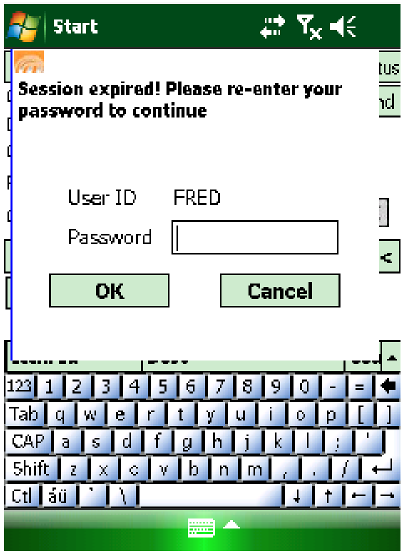

Figure 24

This is in place for a couple reasons:

- If the session is left logged in, ANYONE could come to that HHT device and start entering information etc. So it is set up for Security Purposes.
- HHT/System Performance. We have found that by having an inactive session time out, the performance of ALL HHTs and System is increased.

User needs to enter their password and return to the application.