

**Oracle® Utilities Work and Asset
Management**

RF Bar Coding User Guide

Release 1.9.1.1

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Oracle® Utilities Work and Asset Management RF Bar Coding User Guide for Release 1.9.1.1

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What's New

This section describes some of the major feature and functionality changes that were implemented for this release.

New Features for Release 1.9.1.1

Changes in these releases include the following:

Modified processing so that the system displays a list of values for the [Bin](#) field while receiving an item. The user can choose from this list or add a new bin location.

Added support to print [issue tickets](#) and [receiving reports](#) from the handheld device.

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Release 1.9.1.1

Chapter 1

Basic Operations

RF Bar Coding is an addition to the Oracle Utilities Work and Asset Management application that allows you to perform a variety of system functions using radio frequency (RF) devices. These hand-held computers with bar code scanning capabilities allow you to move freely about the warehouse to perform work while maintaining a real-time connection to the Oracle Utilities Work and Asset Management application.

Note: The RF Bar Coding [Installation & Configuration](#) Guide includes a description of how to install the software required to support bar coding functionality.

Once you have the proper bar-code software installed, you can sign on to the system using a bar code reader. The Main Bar Code Menu includes the following transactions:

- [Checkouts/Returns](#)
- [Stock Transfer](#)
- [Physical Inventory](#)
- [Reorder Handling](#)
- [Printing Issue Tickets](#)
- [Label Printing](#)
- [Printing Receiving Report](#)
- [Stocking](#)
- [Receiving](#)
- [Multi-Step Receiving](#)

Using the Hand-Held Device

The hand-held device has a small keypad, including function and arrow keys, in addition to the scanner button and display screen.

Entering Data

You can enter data by either scanning a bar code label or by entering text from the keypad. If you enter text from keypad, you need to press the Enter key to complete the step. If you scan a label, you do not need to press the Enter key.

The keypad also includes arrow keys for moving the cursor on the screen. In most cases, pressing the down arrow to move out of the current field is the same as pressing the Enter key.

Working with Lists

It is usually much faster to select stock codes, work orders, purchase orders and other long numbers from a list of values, rather than using the small keypad on the hand-held device. Also, you are less likely to make an error if you select from a list. For these reasons, it is preferable to either scan data or select from a list of values if one is available.

| STOCK CODE..... | STOC |
|-----------------|------|
| RJB-0001 | Inve |
| RJB-0002 | Inve |
| RJB-0004 | Anot |
| RJB-0005 | Yet |
| RJB-0006 | Inve |
| RJB-007 | Trac |
| SLC-003 | Shau |
| RJB-008 | Stoc |
| RJB-009 | Anot |
| RJB-010 | Inve |
| RJB-0010 | Main |
| RJB-011 | Stoc |
| RJB-012 | Stoc |
| ILBG01 | Safe |

To see a list of values associated with a field, move the cursor to the field and press the Enter key. When the list displays, you can use the arrow keys to move the highlight up and down the list to select the value you want to use. Press the Enter key to select the highlighted value and return to the previous display. You can also enter a partial value and press the Enter key to see a list of values matching the partial criteria you entered.

Using the Function Keys

The following function keys are defined for RF Bar Coding:

| | |
|----|-----------------------------|
| F1 | Clear current field |
| F2 | Refresh the screen |
| F3 | Options for current field |
| F4 | Return to the previous menu |
| F5 | Insert a new record |



Selecting a Storeroom

If you have more than one Storeroom defined for RFGEN in your User Profile, the Storeroom Selection screen displays when you enter your employee number. Use the arrow keys to select the Storeroom you want to use and press the Enter key.

All of the work you do during the session is restricted to the Storeroom selected. If you want to work on records for another Storeroom, you must logoff and begin a new session to select the new Storeroom.

The Storerooms listed on this screen are taken from your User Profile. To define Storerooms in your User Profile, enter the Key Name RFGEN on an empty line in the grid at the bottom of the User Profile window. Then enter the Storeroom IDs in the Key Value columns to the right. If only one Storeroom is listed in your User Profile, that Storeroom is the default storeroom for all your bar coding sessions.

Logging On and Off



How to Log On

1. **Enter or scan your employee number at the prompt.**

Entries are case-sensitive, so be sure you use the proper case. Typically, data values are stored in upper case.

2. **Press the Enter key if you entered your number from the keypad.**

You do not need to press the Enter key if you scan the value.

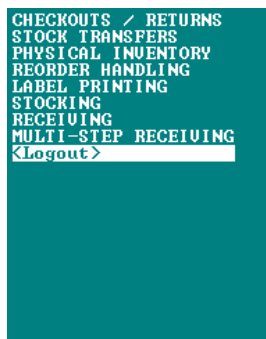
3. **Select a Storeroom if prompted.**

If you use more than one Storeroom, the Storeroom Selection screen opens where you can select the Storeroom you want to use for this session. If you do not use more than one Storeroom, the cursor moves to the Password prompt.

4. **Press the Enter key to bypass the Password prompt.**

Currently there is no password required. Authorization to use the system is maintained within the system based on your employee number.

The Main Menu or the Storeroom Selection menu displays. The Storeroom Selection menu displays only if you have multiple Storerooms set up for RFGEN in your User Profile.



```

CHECKOUTS / RETURNS
STOCK TRANSFERS
PHYSICAL INVENTORY
REORDER HANDLING
LABEL PRINTING
STOCKING
RECEIVING
MULTI-STEP RECEIVING
<Logout>
  
```

How to Log Off

Do any one of the following:

1. Select <Logout> from the Main menu, or
2. Press the F4 key repeatedly until the Log On screen displays, or
3. Turn off your hand-held device.



```

CHECKOUTS / RETURNS
STOCK TRANSFERS
PHYSICAL INVENTORY
REORDER HANDLING
LABEL PRINTING
STOCKING
RECEIVING
MULTI-STEP RECEIVING
<Logout>
  
```

Checkouts/Returns

You can use Checkout/Return transactions to issue stock items from the storeroom and to return stock items you haven't used on a job.

Checkouts and returns can be charged against work order tasks, accounts and assets/functions. Each type of checkout follows a similar procedure. In each case, you begin by entering an employee number and selecting the type of checkout you want to perform. No matter which type of checkout you are performing, you cannot checkout more than the current on-hand quantity.

When returning against a work order task, you cannot return more than was checked out against the current work order. When returning against an Account or an Asset, however, you can return any quantity of any stock item.

Settings in the CHECKOUT ALLOWABLE CHARGE TYPE business rule determine which charge types are valid for these transactions.

How to Initiate a Checkout/Return session

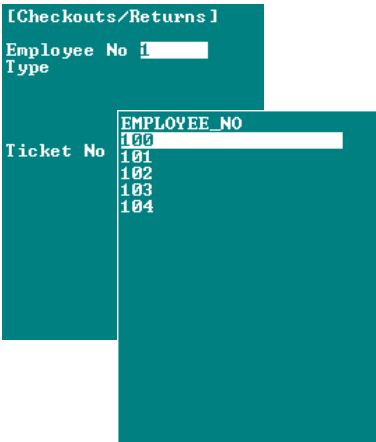
1. Select Checkout/Return from the Main Menu.

To select a menu option, use the up and down arrow keys to highlight the one you want, then press the Enter key on the bar code scanner.

2. Enter or scan your employee number.

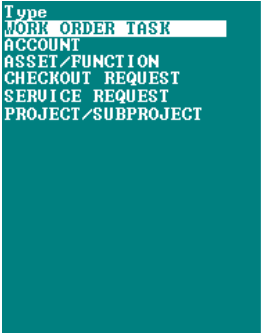
You can check out items against a Work Order in Planning, Pending Approval or Approved status. The Work Order Task must be set to Active status.

If you provide only a partial entry and press the Enter key or the down-arrow, the system displays a list of employee numbers matching your partial entry.



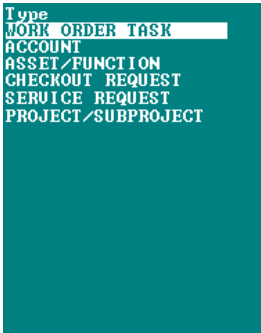
Move the up/down arrow keys to highlight your employee number, then press the Enter key. You can also select another employee's number if you want to attribute your work to another employee.

After you have selected an employee number, the system displays a list of the types of checkouts and returns you can perform.



3. Highlight the task you want to perform and press the Enter key.

You can select Work Order Task, Account Asset/Function, Checkout Request, Service Request or Project/Subproject.



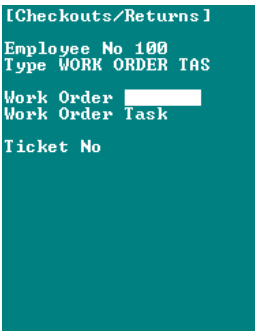
Work Order Task Checkout

Select Work Order Checkout if you are checking out stock items to be charged against a specific Work Order/Work Order Task.

How to Checkout a Stock Item against a Work Order Task

- 1. Select Work Order type from the Checkout/Return Type menu.

2. Scan or select the Work Order number.



If you make a mistake in entering the Work Order number, press the F1 key to erase the entire entry and start over.

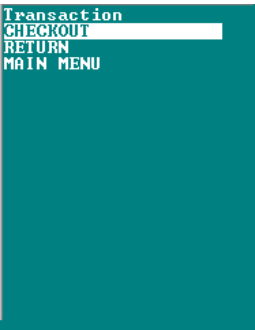
To display a list of Work Order numbers you can select from, press the Enter key or the down-arrow key. If there are too many outstanding Work Orders, you'll be asked to narrow your search. In that case, enter a partial Work Order number and all matching Work Orders will be listed. When the list displays, highlight the one you want to select and press the Enter key.

3. Enter the appropriate Work Order Task number.

Press the Enter key to see a list of tasks you can from select from. If there is only one Work Order task, the system will automatically enter the Work Order Task number when you press the Enter key.

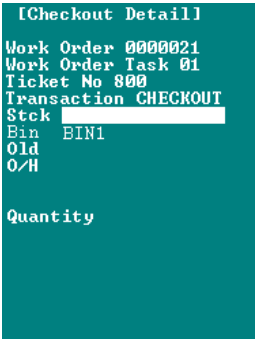
Each stock item checked out is associated with a different Issue Ticket number.

When you enter the Work Order Task number, the system assigns an Issue Ticket number and opens the Transaction Menu where you can indicate if you are performing a checkout or return against the Work Order Task. The Transaction Menu also gives you the option to quit the Checkout/Return process and return to the Main Menu.



4. Select Checkout and press the Enter key.

The Checkout Detail screen for the Work Order task opens.



5. Scan the stock code you want to checkout, or press the Enter key to choose from a list of stock codes.

| STOCK CODE..... | STOC |
|-----------------|------|
| RJB-0001 | Inve |
| RJB-0002 | Inve |
| RJB-0004 | Anot |
| RJB-0005 | Yet |
| RJB-0006 | Inve |
| RJB-007 | Trac |
| SLC-003 | Shau |
| RJB-008 | Stoc |
| RJB-009 | Anot |
| RJB-010 | Inve |
| RJB-0010 | Main |
| RJB-011 | Stoc |
| RJB-012 | Stoc |
| ILBG01 | Safe |

Highlight the stock code you want and press the Enter key. If the stock code you select is a Lot Managed item, you will be asked to select a Lot number.

You can not checkout Direct stock items.

6. Enter the quantity you want to checkout and press the Enter key.

The requested quantity cannot exceed the on-hand quantity.

| [Checkout Detail] | | |
|-------------------|----------------------|----|
| Work Order | 0000021 | |
| Work Order Task | 01 | |
| Ticket No | 800 | |
| Transaction | CHECKOUT | |
| Stck | ILBG01 | |
| Safety | Goggles | |
| Bin | BIN1 | |
| Old | | |
| O/H | 2 | EA |
| Quantity | <input type="text"/> | |

When you enter the quantity, the system records the checkout transaction and displays a PROCESSED message.

The system generates a unique issue ticket number. While it looks as if this number can be edited, any changes you make to it are not saved and the original issue ticket number is used to identify this transaction.

7. Press the Enter key to return to the Transaction menu.

From the Transaction menu you can continue to checkout or return stock items against this Work Order Task or return to the Main Menu.

| |
|-------------|
| Transaction |
| CHECKOUT |
| RETURN |
| MAIN MENU |

Work Order Task Return

A Work Order Task Return transaction is identical to the Checkout procedure until you reach the point where you indicate the type of transaction you want to process. In this case, you select "Return" from the Transaction menu.

How to Return a Stock Item against a Work Order Task

1. Select Work Order from the Checkout/Return type menu.
2. Scan or select your Work Order number.
3. Enter the Task number.

When you enter the task number, the Tans action menu opens.

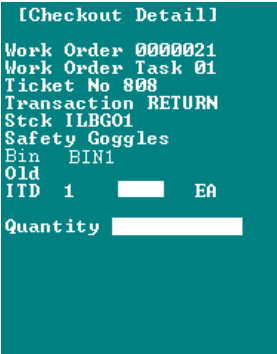
4. **Select Return and press the Enter key.**

The Checkout Detail screen displays.

5. **Scan or select the Stock number you are returning.**

You can return only items that have previously been checked out against the Work Order.

6. **Enter the quantity that you are returning.**

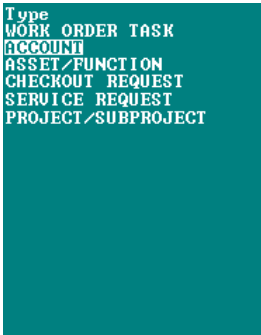


The ITD (Issued To Date) quantity on the screen reminds you of the quantity of this item issued against the current Work Order. Depending on settings in the Checkout Processing Business Rule you may or may not be able to return more than what was issued.

When you enter the quantity, the system records the return transaction and displays a PROCESSED message.

7. **Press the Enter key to return to the Transaction menu.**

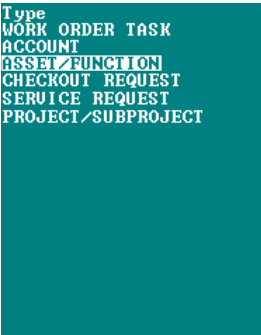
From the Transaction menu you can continue to checkout or return stock items against this Work Order Task or return to the Main Menu.



Account Checkouts/Returns

Select Account from the Checkouts / Returns Type menu to begin an account-based stock issue or return. Account Checkouts and Returns follow a similar process as described above for Work Order Task checkouts and returns, but with two differences:

- After selecting Account from the Checkout / Return Type menu, you must enter an account number for the transaction. To see a list of accounts, provide a starting value in the account prompt, and press the Enter key. It's important to provide an initial value since, without one, there may be too many numbers to list effectively.
- Unlike Work Order Return transactions, Account Returns allow you to specify any positive quantity of any stock code. There is no constraint of having to previously checkout material against the account number.



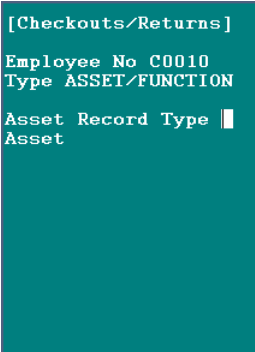
Asset Checkouts/Returns

Asset Checkouts and Returns follow steps similar to other checkouts and returns, but you must first provide an Asset Record Type and an Asset ID.

How to Checkout a Stock Item against an Asset

1. **Select Asset/Function from the Checkouts/Returns Type menu.**

The Asset Checkout/Return menu opens.



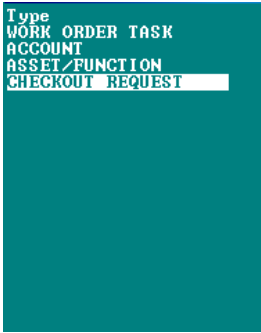
- 2. Press the Enter key to display a list of Asset Record Types.
- 3. Move the highlight and press Enter to select an Asset Record Type.

When you select the Asset Record Type, a list of assets displays.



- 4. Select the Asset you want to use

Now you can use steps similar to those in other checkout procedures to checkout and return any stock item in any quantity against the Asset.



Checkout Requests

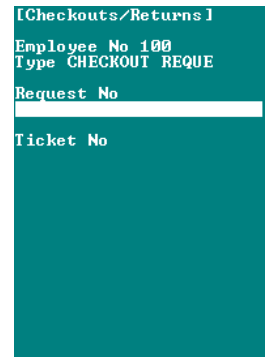
Checkout Request transactions follow similar steps, but you must first provide a Checkout Request number.

Since Checkout Requests are designed for immediate, one time use, parts can not be returned against them. Instead, parts must be returned against an account number, project number, or another charge type.

How to Checkout a Stock Item against a Checkout Request

- 1. Select Checkout Request from the Checkouts/Returns Type menu.

The Checkout Request menu opens.



- 2. Scan the Checkout Request number, or press the Enter key to select from a list of Checkout Request numbers.

When you do, the system assigns an Issue Ticket number.

- 3. Press the Enter key to continue.

The Transaction Menu opens where you can indicate if you are performing a checkout or return.

- 4. Select Checkout.

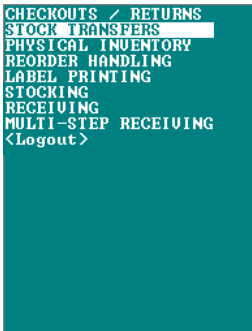
A new screen opens where you can select the stock code and quantity you want to checkout.

- 5. Scan the stock code you want to checkout, or press the Enter key to choose from a list of stock codes on the Checkout Request.
- 6. Enter the quantity you want to checkout and press the Enter key.

The system processes the checkout and returns to the Transaction menu where you can checkout additional items against the Checkout Request or return to the Main Menu.

Other Checkouts/Returns

The remaining types of checkout and return transactions (Service Requests and Project/Subproject) follow a similar process to the one described above for Work Order Task checkouts and returns.



Stock Transfer

A Stock Transfer transaction allows you to move stock from one location to another. Select Stock Transfer from the Main Menu to open the Stock Transfer screen where you can create a new Stock Transfer request or work with existing Stock Transfer requests.

Stock Transfer requests identify the stock item and quantity being transferred, the two storerooms involved in the transfer, and the identity of the person making the request. Once the transfer data is complete, separate transactions are required to issue and receive the stock in the appropriate storerooms.

From the Stock Transfers window, press Enter or the down arrow to display the Item Transfer menu, showing a list of the following transfer options:

- Request** - Select Request to add additional item to an existing Stock Transfer Request.
- Issue** - Select Issue to move the requested material from the issuing storeroom.
- Receive** - Select Receive to record the receipt of the requested material in the receding storeroom.

Cancel - Select Cancel to return to the Stock Transfer window.

Issuing a Stock Transfer

You can only complete an issue transaction if the issuing storeroom is your default storeroom for this session.

When all the material to transfer is specified on the request, the person initiating the move performs an issue transaction to record that the material is leaving the issuing storeroom.

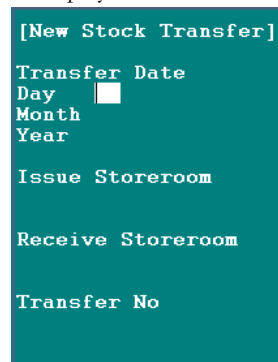
Related Topics

[Stock Transfer](#)

How to Create a Stock Transfer

1. **Select Stock Transfer from the Main Menu.**
2. **Press the F5 key.**

The New Stock Transfer screen displays.



```

[New Stock Transfer]

Transfer Date
Day
Month
Year

Issue Storeroom

Receive Storeroom

Transfer No
    
```

3. **Enter the date.**

You must enter the day and month in separate steps. After you enter the day number, a list of months is presented from which you can select, and the year defaults to the current year.

4. **Enter the Storeroom that will to issue the stock.**

You can press the Enter key to select from a list of storerooms.

5. **Enter the Receiving Storeroom or select it from the list of Storerooms.**

The system generates a stock transfer request number. No description of the receiving storeroom displays on this screen, only the storeroom ID.

You can now add Stock Items to this record.

6. **Press the Enter key to create another Transfer Request.**

If you do not want to create another request, press the F4 key to return to the previous menu.

Take note of the stock transfer request number so you can locate it later.

For you to add Stock items to a Transfer Request, the Receiving Storeroom must be your default Storeroom. If not, the system displays an authorization failure message when you try to select the Request option. You can either log off and log in again using the appropriate storeroom or have another user enter the Stock data.

How to Add Stock Items to a Transfer Request

1. Select Stock Transfer from the Main Menu.

2. Scan or select the Transfer Request you want to open.

You can press the Enter key to display a list of available requests.

When you scan or select the number, the system opens the Transfer Record.

```

[Stock Transfers]
Press <F5>
To Create NEW
Transfer No 802
Transfer Date 12/19/02
Issue Storeroom RJB
Receive Storeroom ILB
Initiator
RBEELEER
    
```

3. Press the Enter key to display the Item Transfer options window.

```

Item Transfer
REQUEST
ISSUE
RECEIVE
CANCEL
    
```

4. Select the Request option.

The Stock Transfer Detail screen opens.

```

[Stock Trfr Detail]
Transfer No 806
Trfr Date 12/20/02
Iss RJB Rec ILB
Transfer REQUEST
Stock
Old
Status
O/H
Quantity
    
```

You cannot add a duplicate Stock Code even to correct an error in the quantity requested. To correct an error, you must create a new Stock Transfer Request with an appropriate adjustment quantity.

5. Scan or select the Stock Code for the items being transferred.

The available list contains all the available stock items in the issuing storeroom except the ones already referenced by the request.

When you enter the Stock Code, the display shows the on hand quantity (O/H) in the issuing storeroom.

6. Enter the quantity you want to transfer.

You can ask to transfer more than the current on hand quantity.

After you enter a quantity, the system displays a PROCESSED message confirming that the item has been added.

```
[Stock Trfr Detail]
Transfer No 806
Trfr Date 12/20/02
Iss RJB    Rec ILB
Transfer REQUEST

Stck RJB-0001
Inventory stock code
Old
Status
O/H 107      EA
Quantity 5

PROCESSED
```

7. Press the Enter key.

The Item Transfer options screen opens where you can continue working with this record. If you want to return to a previous menu, press the F4 key.

How to Issue a Stock Transfer

1. Open the appropriate Stock Transfer record, navigate to the Item Transfer window, and select Issue.

```
Item Transfer
REQUEST
ISSUE
RECEIVE
CANCEL
```

2. Scan or select the Stock Code for the item being transferred.

You may not issue material against this request that has already been issued.

```
[Stock Trfr Detail]
Transfer No 805
Trfr Date 12/20/02
Iss RJB    Rec ILB
Transfer ISSUE

Stck 
Old
Status
O/H
Quantity
```

3. Enter the quantity being transferred.

When you enter a quantity, the system displays a PROCESSED message confirming that the item has been issued.

```
[Stock Trfr Detail]
Transfer No 805
Trfr Date 12/20/02
Iss RJB Rec ILB
Transfer ISSUE

Stck ILBG01
Safety Goggles
Old
Status REQUESTED
Req 1 EA
Quantity 1

PROCESSED
```

4. Press the Enter key.

The Item Transfer options screen opens where you can continue working with this record. If you want to return to a previous menu, press the F4 key.

You cannot issue material against this request that has already been issued. If you are unsure of what remains to be issued, return to the Stock Transfer window and press Enter in the Issue Storeroom field to see the stock quantity that remains to be issued.

Receiving a Stock Transfer

Receive transactions record when the transferred stock is placed in the destination Storeroom.

```
Item Transfer
REQUEST
ISSUE
RECEIVE
CANCEL
```

Receive transactions follow similar steps as Issuing transactions and result in a confirmation of the receipt activity. You can only complete a Receive transaction if the Receiving Storeroom is your default Storeroom for this session. You must receive the entire quantity issued.

```
[Stock Trfr Detail]
Transfer No 805
Trfr Date 12/20/02
Iss RJB Rec ILB
Transfer RECEIVE

Stck ILBG01
Safety Goggles
Old
Status ISSUED
Req 1 EA
Quantity 1

PROCESSED
```

```

CHECKOUTS / RETURNS
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<Logout>

```

Physical Inventory

Physical Inventory transactions count stock items to ensure inventory accuracy. Physical inventory requests are generated on-line in the database. You cannot create a Physical Inventory record using the hand-held scanner. You can, however, use bar coding to process Physical Inventory records once they are created.

To conduct a Physical Inventory with a bar code reader, select the stock item from the list, and enter the quantity of the item. Whether the on hand inventory quantity is displayed, or not, depends on how the Physical Inventory Rules business rule is configured in the Administration Subsystem. If the Blind Count option in the business rule is set to Yes, the current on-hand quantity is hidden during Physical Inventories.

If the quantity you counted differs from the quantity expected, you'll be warned and given a chance to recount the item. You may not enter a zero quantity.

Depending on how your organization has configured the system, inventory adjustments may or may not be conducted using the hand-held scanners. If adjustments are not allowed and your count differs from what the system expects, you'll have to abandon the current counting by pressing F4. Report the discrepancy, then choose another request.

How to Process a Physical Inventory Record

1. **Select Physical Inventory from the main menu.**
2. **Press the Enter key to display a list of Physical Inventory records.**

You can also enter the Physical Inventory directly if you know it, or enter a partial Physical Inventory number to narrow the list. Only Physical Inventory records for your default storeroom appear on the list.

3. **Select appropriate Physical Inventory record from the list.**
4. **Scan or select a stock code you want to count.**
Lot managed stock is not supported in the current release.
5. **When you scan the stock label or select the stock item from the list, the system supplies additional details about the item.**

```

[Inventory Detail]
Phys Inv No 1407
Stck ILBG01
Safety Goggles
Old
Primary Bin

Unit of Issue EA
Avg Price 13.475
Quantity 

```

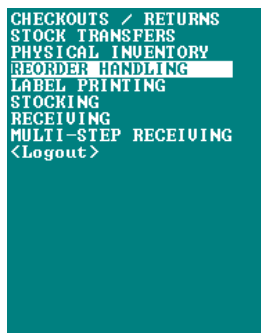
Whether or not the on hand inventory quantity is displayed depends on how your organization has configured the Physical Inventory Rules business rule. If the Blind Count key value in the business rule is set to YES, the expected quantity does not display.

6. **Count the stock item and enter the quantity.**

If the quantity you counted differs from the quantity expected by the system, you'll be warned and given a chance to recount the item.

Depending on how your organization has configured the system, inventory adjustments may or may not be conducted using the hand-held scanners. If adjustments are not allowed

and your count differs from what the system expects, you'll have to abandon the current counting by pressing the F4 key. Report the discrepancy, then choose another request.



Reorder Handling

RF Bar Coding supports two types of reorder handling transactions:

- **Keep Fill Requests** are completed by vendors during periodic re-supply or consignment visits. During these visits, vendor personnel can use a hand-held bar code reader to enter required quantities for the stock items they maintain.
- **Reorder Review Requests** are similar to Keep Fill Requests, except they are initiated by storeroom personnel as they notice what appear to be shortages. Otherwise, both procedures are identical and both result in reorder review records.

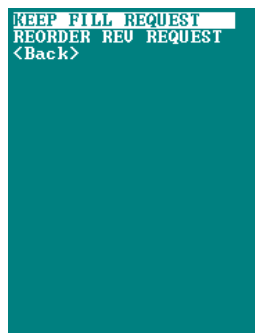
When either type of request is processed, the system issues a reorder request for the quantity of the stock item entered. if a blanket contract exists for the stock item, the reorder request is drawn against that blanket contract.

How to Process a Keep Fill Request or a Reorder Review Request

1. Select Reorder Handling from the Main Menu.

Select Reorder Review Request instead you want to process a Reorder Review transactions. Other than your selection from this menu, the procedures for the two Reorder transactions are identical.

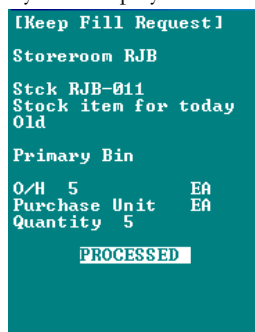
2. Select Keep Fill Request from the submenu.



3. Scan or select the appropriate stock code.

4. Enter the quantity to be ordered.

When you enter a quantity, the system displays a PROCESSED message.



When a Keep Fill request is processed, the system issues a reorder request for the quantity of the stock item entered. If a Blanket Contract exists for the stock item, a reorder request is drawn against that Blanket Contract.

5. Press the Enter key.

The display returns to the Stock Code prompt where you can enter the next stock item.

When you are finished entering Keep Fill Requests, press the F4 key to return to the Main Menu to select other functions or end your bar coding session.

Printing Issue Tickets

You can print issue tickets from your handheld device. In order to use this feature, you must install the SRW database package. Until the SRW package is run, the stored database procedure SDBP_RFGEN_PRINT is invalid. For more information, see [Database Scripts](#).

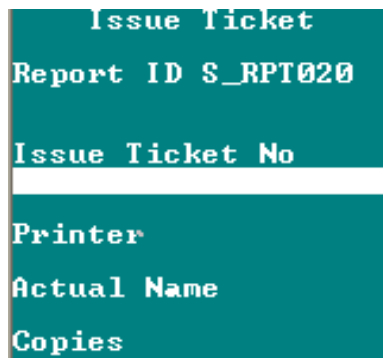


How to Print Issue Tickets

1. Select Issue Ticket from the Printing sub menu.

In order to view the Issue Ticket menu option, the Issue Ticket rule key in the Bar Code Configuration business rule must be set to ON.

2. Enter the Issue Ticket No of the record that you want to print.



3. Select the printer alias.

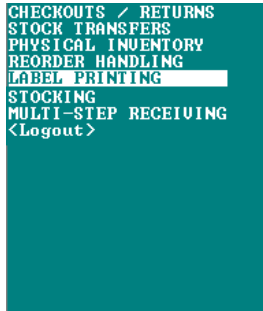
Once you select the printer alias, the actual network name of the printer also gets populated.

4. Enter the number of copies of the issue ticket that you want to print.

5. Press Enter.

The issue ticket prints on the specified printer.

You can also print an issue ticket after checking out a stock item. The system provides the option at the end of the checkout process.



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Label Printing

Label formats are defined in the Software bar-code printing system that supports RF Bar Coding. See the RF Bar Coding [Installation & Configuration](#) Guide for specifics on setting up these label formats.

Given that the labels are defined, you have to provide only two bits of information to begin the Print Label process - the output printer and the label type.

In addition, you must configure two elements within Oracle Utilities Work and Asset Management before you can print labels.

- List the Bar Code Print Label function in the Responsibilities of users who will need to access this functionality from the Multi-Step Receiving module.
- Set the Bar Code Label Drop Directory in the Default Directories business rule.
- Define printer labels in code table 80.

After the necessary software has been installed and configured, you can print labels by using either the Print Bar Code Labels action or a hand-held bar code reader. In either case, you specify a printer to use, the type of label you want to print, and the information to include on the label.

How to Print Labels

1. Select **Label Printing** from the **Printing** sub menu.
2. Select a destination printer.
3. Select a defined label from the list and press **Enter**.
4. Enter the details regarding the selected label.

The details you can enter include stock number and quantity to print.

5. Press **Enter**.

The label prints on the specified printer.

Printing Receiving Report

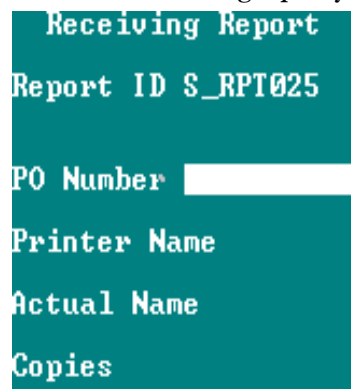
You can print the receiving report from your hand-held device.

How to Print Receiving Reports

1. Select **Receiving Report** from the **Printing** sub menu.

In order to view this menu option on the handheld device, set the Receiving Report rule key in the Bar Code Configuration business rule to ON.

2. Enter the Purchase Order No of the receiving report you want to print.

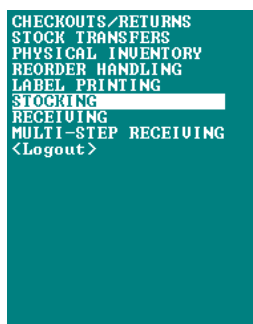


3. Select the printer alias.

Once you select the printer alias, the actual network name of the printer also gets populated.

4. Enter the number of copies of the receiving report that you want to print.
5. Press Enter.

The receiving report prints on the specified printer.

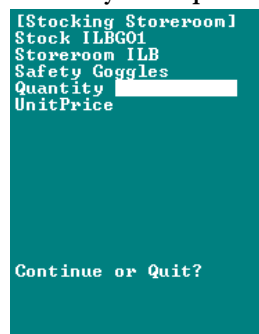


Stocking

A Stocking transaction allows you to place items in the Storeroom without requiring that you perform a receipt or Stores Issue / Return. For example, if some unclaimed parts were found in the work area, you could use a Stocking transaction to return these items back into the Storeroom. Stocking transactions increase the Inventory Quantity for the entered stock/storeroom code and adjust the average unit price for the storeroom.

How to Add Items to the Storeroom

1. Select Stocking from the Main Menu.
2. Scan or select the Stock Number you want to add to the Storeroom.
3. Enter the quantity of the stock Item you are placing in the Storeroom.



When you enter a quantity, the cursor moves to the Unit Price field and defaults to the current Average Unit Price for the item.

4. Accept current price or enter a new price for the items you are putting in the Storeroom.

If you enter a new price, the system calculates a new Average Unit Price for the item.

5. Press the Enter key.

The system displays a PROCESSED message indicating that the quantity and price information has been added to the Storeroom.

6. Press the Enter key.

The cursor moves to the Continue or Quit prompt, where you can press Q to return to the main menu or C to return to the Stocking screen where you can scan or select the next part number to add to the Storeroom.

```
[Stocking Storeroom]
Stock ILBG01
Storeroom ILB
Safety Goggles
Quantity 5
UnitPrice 13.475

PROCESSED
Continue or Quit? █
```

```
CHECKOUTS/RETURNS
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STOCKING
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<Logout>
```

Receiving

You can use Receiving transactions to match items received from vendors against Purchase Order line items. Receiving transactions record the full or partial receipt of the items, updates the Purchase Order Line Items with receiving information, and updates the records in the Storeroom Catalog module in main application with a new On-Hand Quantity and calculated Average Unit Price. You can also use Receiving transactions to return items to vendors for replacement or credit.

How to Receive Stock Items against a Purchase Order

1. Select Receiving from the Main Menu.

The Receiving Menu opens where you can record basic information about the Purchase Order.

```
[Receiving Menu]
Receive All<Y/N> █
Transaction Type
  Receive
  Return
  Credit Return
PO
PO Item
Waybill
Packing Slip

Continue or Quit
```

If you enter Y in the Receive All box, the Transaction Type and PO Item fields disappear. You need only to enter the PO Number and Waybill and Packing Slip information to complete the transaction.

2. Enter N in the Receive All box.

Or enter Y if you want to receive all remaining line items on the Purchase Order.

3. Select Receive from the Transaction Type list and press the Enter key.

Or select Return or Credit Return if you are doing a return transaction. Returns and Credit returns follow similar steps to a Receive transaction.

4. **Scan the Purchase Order number, or press the Enter key to select from a list of PO numbers.**

If you are selecting a PO number from the list, you may need to enter a partial number in the field before pressing the Enter key to narrow your search.

Depending on settings in the Receiving Configuration business rule, you may or may not be able to receive more items than were ordered on the original PO.

5. **Scan the Line Item number, or press the Enter key to select from a list of Line Items on the Purchase Order.**

6. **Scan the Waybill Packing Slip and Packing Slip information if available.**

Or press the Enter key to bypass these fields.

7. **Press the Enter key to Continue.**

A new Receiving screen opens where you can enter information about the Stock Item you are receiving.

The screenshot shows a teal-colored screen with white text. At the top, it says "[Receiving]". Below that, it lists "PO 03000017 001", "Stock ILBG01", "Storeroom RJB", and "Safety Goggles". In the middle, there is a field for "Qty" with the value "5" and a "BIN" field. At the bottom, there are two rows of text: "Force Complete" and "Print Barcode (Y/N)".

8. **Enter the Quantity of the stock item being received.**

The system prompts with the quantity remaining to be received. You can accept this quantity or enter another quantity.

9. **Enter Bin number information if appropriate.**

You can choose to select the bin from the list of values containing all the bin locations for the stock code and storeroom that is currently being received.

You can also choose to enter a new bin location. If you enter a new location, the system it as the primary bin location for that stock item.

If you want to remove any remaining on order quantities, enter a Y in the Force Complete box.

10. **Press the Enter key to accept the Force Complete “N” prompt.**

Change the Force Complete setting to Y before pressing Enter if you want to remove any remaining on order quantities and mark the item as fully received.

11. **Scan or Enter the Lot or Component ID information if prompted.**

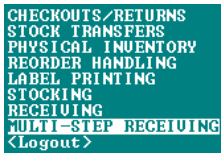
Lot and Component information is only required if the stock item you are receiving is a lot managed item or a trackable stock item. After you enter the Lot or Component ID information, press the Enter key to continue.

12. **Enter Y or N in the Print Labels box.**

Enter Y to print a bar code label for the stock item or enter N if you do not want to print a label. The system prompts with an N in this field.

13. **Press the Enter key to complete the Receiving transaction.**

The display returns to the Receiving menu where you can continue receiving items.



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Multi-Step Receiving

The Multi-Step Receiving process allows you to track the delivery of items through several distinct steps from the time that they arrive at the loading dock until they are placed in the storeroom. With Multi-Step Receiving, deliveries can be processed initially by someone with a basic knowledge of the receiving process and then be completed by someone with additional qualifications who accepts the items into the storeroom.

Before you can use Multi-Step Receiving with a bar code device, your organization must configure the system for Multi-Step Receiving as described in the User Guide. In particular, the Enforce Receiver business rule must be set to ON. In order to capture discrepant shipment information, the Vendor Options business rule must also be configured.

The multi-step receiving process consists of three steps:

Step 1: [Recording Deliveries](#) - The multi-step receiving process begins when a shipment arrives and a new MSR record is created to hold the basic delivery information. During this step, you will create the new record, and enter information at the main (header) level.

Step 2: [Placing Items in Receipt](#) - Once the basic information about the delivery has been entered, the next step is to identify and count items received. Counting and recording the items received is called placing items in receipt. You can place items in receipt at the same time you create the MSR record and enter the delivery information, or you can perform this step as a separate process.

Step 3: [Receiving Items into the Storeroom](#) - Finally, items are accepted and received into the storeroom. Before receiving items, you may need to inspect them or conduct other tests. Items that are identified as “quality” items can only be received by persons authorized by your organization to receive quality items.

You have two options for receiving the items currently In Receipt. You can select the Receive All option to receive all In Receipt items on the MSR record. This makes the items available in the Storeroom and the system prompts you for Vendor Performance and print Barcode Label prompts. If you do not want to use the Receive All action, you can receive each item individually.

Optional Step: [Vendor Performance and Returns](#) - Items that are not accepted can be returned to the vendor for exchange or refund. Any discrepancies noted during the receiving can be recorded on the MSR record and used to calculate vendor performance.

Vendor Performance functionality allows you to rate a vendor's performance based on delivery time and other attributes established by your organization. Over time, this information helps you to assess a vendor's ability to deliver items by the promised date and in satisfactory condition.

Recording Deliveries

The Multi-Step Receiving process begins when a shipment arrives and a new MSR record is created to hold the basic delivery information. During this step, you will create the new record, and enter information at the main (header) level.

How to Create a MSR Delivery Record

1. Select **Multi-Step Receiving** from the Main menu.

The Delivery ID screen opens.



```

Multi-Step Receiving
Press <F5> To Create
New Delivery ID

Delivery ID 

MSR Header<Y/N>
  
```

2. **Press the F5 key.**
3. **Press the Enter key to accept the current date as the Delivery Date.**

You can change the delivery date later if necessary.

The system creates a new MSR record and displays the Delivery ID number.

If your system is not set to generate Delivery ID numbers automatically, you need to enter a unique ID number to identify the record.

4. **Press the Enter key to Continue.**

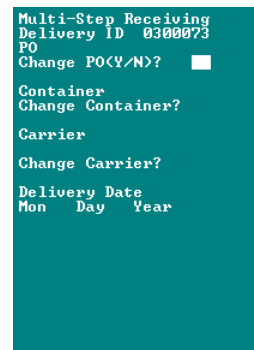
The system returns to the Delivery ID screen.

How to Record Delivery Information

1. **Select the appropriate Delivery ID.**

If a record does not yet exist for the delivery, you must first [create the MSR record](#) and then select the Delivery ID from the list of values.

2. **Enter Y at the MSR Header prompt to add delivery information.**



```

Multi-Step Receiving
Delivery ID 0300073
PO
Change PO<Y/N>? 

Container
Change Container?

Carrier
Change Carrier?

Delivery Date
Mon Day Year
  
```

3. **Enter Y at the Change PO prompt.**

If you do not want to record a PO number, as in the case of mail or parcel deliveries, enter N at the Change PO prompt.

4. **Scan the PO number or select it from the list of values.**
5. **Use similar procedures to enter Container and Carrier information.**

Enter Y at the Change prompt and select the desired value from the list.

6. **Change the Delivery Date if desired.**

As you move through the Month, Day and Year fields, the system defaults the date information from the previous screen. You can change the date information or press the Enter key each time to accept the default and move to the next field.

```
Multi-Step Receiving
Delivery ID 0300073
PO
Change PO(Y/N)? y
03000291
Container
Change Container? y
BOX
Carrier
Change Carrier? y
FED EX
Delivery Date
Mon10 Day30 Year2003
CONTINUE
```

7. Press the Enter key to continue.

The system opens a new window where you can enter Marker and UPC information and indicate the number of containers received.

8. Scan or Enter a Marker and UPC, if applicable.

A marker is a temporary, highly-visible identifier you assign to help locate the shipment at your facility.

The UPC is the carrier's identifying number for the shipment.

9. Enter the number of containers in the shipment.

```
Multi-Step Receiving
Delivery ID 0300073
PO 03000291
Container BOX
Carrier
FED EX
Delivery Date
Mon10 Day30 Year2003
Marker 15
UPC
1257231965321112
Container Qty 1
CONTINUE
```

10. Press the Enter key to Continue.

The PO Item List screen opens showing the total number of line items on the PO to be received.

```
Multi-Step Receiving
Delivery ID 0300100
PO 03000324
Total Items 3
Pick All (Y/N)
Item List (Y/N)
Item Detail (Y/N)

Continue (Y/N)
```

11. Enter Y or N at the Pick All prompt.

“Picking” an item copies the item from the Purchase Order to the MSR record and makes it available for further processing.

Y - If the shipment contains several different items, enter Y at the Pick All prompt to create line items on the MSR record for all open PO line items. Using the Pick All feature is faster than creating the line items individually and there is no penalty for creating line items that you do not use. If you enter Y at the Pick All prompt, the screen changes to allow you to select the special options listed in the sidebar. To prepare for the next section, select Go to Item Detail to open the Item Detail screen.

```
Multi-Step Receiving
Delivery ID 0300040
PO 01000780
Total Items 1
Pick All <Y/N> y

Pick All Options:
In Receipt
Receive
Receive and Accept
Go to Item Detail
MSR Main Menu

More Options Y/N
Continue <Y/N>
```

N - If you want to select the items individually, enter N at the Pick All and Item List prompts, then enter Y at the Item Detail prompt to open the Item Detail screen.

```
Multi-Step Receiving
Delivery ID 0300073
PO 03000291
Item 
Vendor Rating<Y/N>
Type
In Receipt
Receive
Exchange Return
Credit Return
Pick Another Item

Continue<Y/N>
```

When you enter Y and the Pick All prompt, the system displays the following Pick All options:

In Receipt - Moves all To Receive quantities to In Receipt.

Receive - Moves all In Receipt quantities to Receive.

Receive and Accept - Combines the previous options and moves all To Receive quantities to Receive.

Go To Item Detail - Opens the Item Detail screen.

MSR Main Menu - Opens the initial MSR menu screen.

Note: The Pick All options do not process Lot, Quality, or Component items. These items must be received individually.

Placing Items in Receipt

Once the basic information about the delivery has been entered, the next step is to identify and count items received. Counting and recording the items received is called placing items in receipt. You can place items in receipt at the same time you create the MSR record and enter the delivery information, or you can perform this step as a separate process.

How to Place Items in Receipt

If you need to navigate to the Item Detail screen, select the Delivery ID on the MSR Main Menu, then enter Y at the PO Item prompt, N at the Pick All prompt, N at the Item List prompt, and Y at the Item Detail prompt.

1. On the Item Detail screen, select the Item you want to process.

2. Enter N at the Vendor Rating prompt, if displayed.

The Vendor Rating prompt only displays if the record already has In Receipt. Using Vendor Rating is discussed in more detail on page 23.

3. Select In Receipt from the Type list and press the Enter key.

```
Multi-Step Receiving
Delivery ID 0300069
PO 03000319
Item 002
Vendor Rating<Y/N>n
Type
  In Receipt
  Receive
  Exchange Return
  Credit Return
  Pick Another Item
Continue<Y/N>
```

4. Enter Y and the Continue prompt.

5. Scan or enter a Bin number.

The system supplies the default Bin ID if one exists. To select another bin from the list of values, clear the default Bin ID by pressing space, then press the Enter key to display the list of values.

6. Enter the quantity you want to place in receipt.

If necessary, you can enter more than the quantity ordered.

```
Multi-Step Receiving
Delivery ID 0300069
PO03000319 Item 002
Stockcode/Storeroom
RJB-0004 RJB
Wireless Signal Boost
ter

Bin
DEFAULT BIN
In Receipt Quantity:
10
Place in Receipt? Y
Process Another?
```

7. Enter Y at the Place in Receipt? prompt and press the Enter key.

The system makes this quantity of the item available for receiving into the Storeroom.

8. Enter Y or N at the Process Another? prompt.

Enter Y if you want to select another item for this record. Repeat steps 2-7 until you have placed all items in receipt that you want to process.

Enter N if you are finished selecting Items.

Receiving Items into the Storeroom

Finally, items are accepted and received into the storeroom. Before receiving items, you may need to inspect them or conduct other tests. Items that are identified as "quality" items can only be received by persons authorized by your organization to receive quality items.

You have two options for receiving the items currently in receipt. You can select the Pick All > Receive option to receive all In Receipt items on the MSR record. When you do, the screen will change to show the number of items updated. If you do not want to use the Pick All > Receive option, you can receive each item individually.

You can not use the Receive All option to receive Lot, Quality, or Component items. These items must be received individually.

How to Receive Items

1. Select the appropriate Delivery ID.
2. Enter Y at the PO Item List prompt.
3. Enter N at the Pick All prompt.
4. Enter Y at the Item Detail prompt.

Or enter Y and the Item List prompt if you have previously picked all and now want to receive all items. If you do this, you can skip the next step.

5. Select the item you want to receive from the list of values.
6. Enter N at the Vendor Rating prompt.

If you wanted to enter Vendor Rating information, you would enter Y and proceed as discussed in the following section.

7. Select Receipt from the Type list and press the Enter key.
8. Enter Y at the Continue prompt.
9. Enter the Quantity you want to receive.

You cannot enter a quantity larger than the In Receipt quantity.

```
Multi-Step Receiving
Delivery ID 0300042
PO 03000295 Item001
Stock Code/Storeroom
RJB-0001 RJB
Posi-twist Wire Conn
Bin
DEFAULT BIN
In Receipt Qty:
5
Qty: 5
Print Label?
Force Complete?
Apply Receiving?
Process another?
```

10. Enter Y or N at the Print Label prompt.

If you enter Y, the system opens a new window where you can select a printer, enter a serial number (if appropriate), and specify the number of labels to print.

11. Enter Y or N at the Force complete prompt.

You can use the force complete to indicate that no additional quantities will be received for this item, even though more were ordered.

12. Enter Y at the Apply Receiving prompt.

The system marks the item as received and makes the quantity available in the Storeroom.

13. Enter Y or N at the Process Another? prompt.

If you select Y, the system returns you to the Select Item screen where you can choose another item on this MSR record.

Repeat steps 5-13 until you have received all of the In Receipt quantities you want to process.

Vendor Performance and Returns

The Vendor Performance option is only available when the Vendor Options Business Rule is configured to track Vendor Performance.

Items that are not accepted can be returned to the vendor for exchange or refund. Any discrepancies noted during the receiving can be recorded on the MSR record and used to calculate vendor performance.

Vendor Performance functionality allows you to rate a vendor's performance based on delivery time and other attributes established by your organization. Over time, this information helps you to assess a vendor's ability to deliver items or services by the promised date and in satisfactory condition.

How to Record Vendor Rating Information

1. Select the appropriate Delivery ID.
2. Enter Y at the PO Item List prompt.
3. Enter N at the Pick All prompt.
4. Enter Y at the Select Item prompt.
5. Select the item you want to record a performance rating for.
6. Enter Y at the Vendor Rating Prompt.
7. Press Enter to display the list of Discrepant Attributes.

```
Multi-Step Receiving
Delivery ID 0300071
PO 03000324 Item001
Discrepant Attribute
Vendor Caused(Y/N)
Apply Update(Y/N)?
Process Another?
```

```
ATTRIBUTES.....
R01 PACKAGING
R02 NO PO
R03 DAMAGE
R04 BUY AMERICAN A
R05 PO COMPLIANCE
R06 SHELF LIFE EXP
R07 CLEANLINESS
R08 DIMENSIONAL
R09 APPROVED MANUF
R10 CERTIFICATIONS
R11 DIMENSIONAL UE
R12 TRIR INSPECTIO
R13 MISCELLANEOUS
```

The list of Discrepant Attributes is controlled by the Vendor Performance Attributes Business Rule in the main application.

8. Select the appropriate attribute and press the Enter key.

9. Enter Y or N at the Vendor Caused prompt.

```
Multi-Step Receiving
Delivery ID 0300071
PO 03000324 Item001
Discrepant Attribute
R06 SHELF LIFE EXP

Vendor Caused(Y/N) ☐
Apply Update(Y/N)?
Process Another?
```

Enter Y if the discrepancy was due to vendor error and you want it to count against the vendor's performance rating.

Enter N if the discrepancy was not due to vendor error and you want the vendor to receive the maximum possible score for the delivery.

10. Enter Y at the Apply Update prompt.

The system records the attribute and adjusts the Vendor Performance rating for the delivery.

11. Enter Y at the Process Another? prompt.

The cursor returns to the Discrepant Attribute field, where you can press Enter to select another discrepant attribute for this item.

If you enter N at the Process Another prompt, the Select Item screen opens, where you can choose from several options for continuing to work with the MSR record or returning to the Main Menu.

How to Return Items for Exchange or Credit

1. Select the appropriate Delivery ID.
2. Enter Y at the PO Item List prompt.
3. Enter N at the Pick All prompt.
4. Enter Y at the Select Item prompt.
5. Select the item you want to return from the list of values.
6. Enter Y or N at the Vendor Rating prompt.
7. Select the type of return you want to process.

You can select either Exchange Return or Credit Return.

8. Enter Y at the Continue prompt.
9. Select a Bin if necessary.

If the stock item is in more than one bin, the system displays a list of bins for you to select from.

If you are returning a lot-controlled item, or a trackable stock item, the system will also prompt for lot and component ID information as appropriate.

10. Enter the quantity to be returned as a negative number.

You cannot return more than the net received quantity shown on the screen. For trackable stock items, the return quantity must be -1.

11. Enter Y at the Apply Return prompt.

The system adds the quantity returned to the Returned for Replacement or Returned for Credit count, and updates the To Receive and Net Receipt counts as necessary.

12. Enter Y or N at the Vendor Caused prompt.

Enter Y if the discrepancy causing the return was due to vendor error and you want the return to count against the vendor's performance rating.

Enter N if the discrepancy was not due to vendor error and you want the vendor to receive the maximum possible score for the delivery.

After you enter your Vendor Caused selection, the system opens the Pick Item screen where you can continue to process items on this MSR record or return to the Main Menu.

Troubleshooting

If you have connection problems or experience unexpected results with data, verify connection settings and business rule settings.

Fields/ Lists Not Displaying Data

If you find that you have problems connecting or experience issues with data [verify how the DSN is referenced by RFGen](#).

Fonts Not Displaying Correctly

Check the Web Configuration Rule to see that the appropriate references are set to obtain the correct fonts. Also review the procedure for [Installing Bar Code Fonts](#) to ensure that fonts are installed correctly.

Transfers

The Receiving Storeroom must be your default Storeroom to complete a transfer request, to receive a stock transfer, or to issue a stock transfer. If your default Storeroom is not correctly set, the system displays an authorization failure message when you try to select the request option. To resolve this issue, log off and log in again using the appropriate storeroom.

Chapter 2

Installation & Configuration

RF Bar Coding supports a subset of application functionality through radio frequency (RF) devices. These devices are typically IBM compatible handheld computers with bar code scanning capabilities. Such devices allow users to move freely about their work area while maintaining a real-time connection to the central Oracle Utilities Work and Asset Management system.

Overview

Barcode label printing is only supported and certified using Loftware label printing software. Loftware allows you to create label layouts in their software and link the layouts to text file outputs from WAM/RFGEN to use to populate the labels. No barcode label printing will occur without the Loftware software being in place and both Loftware and Oracle Utilities Work and Asset Management being configured for this. Also, hardware needs to be purchased that Loftware will support to do the actual printing.

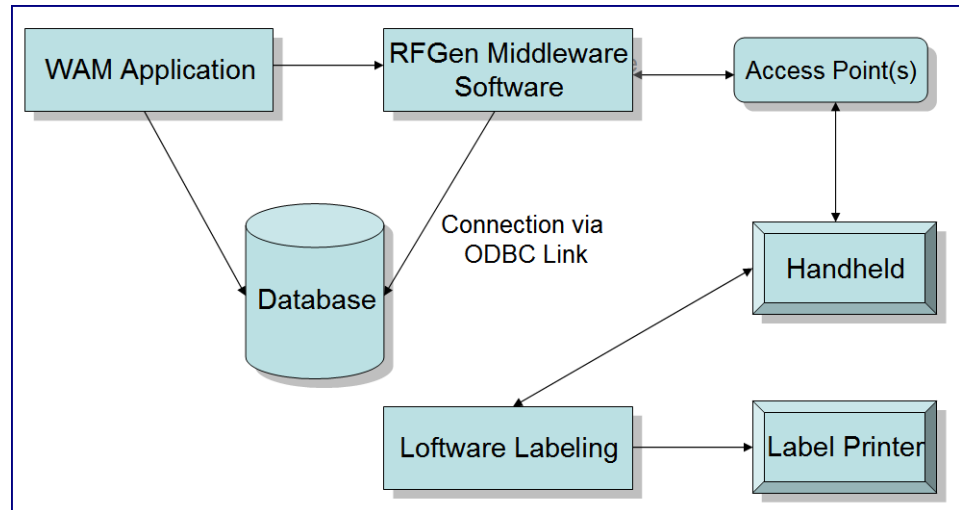
Implementing the system involves the following:

- [Installing RFGEN](#)
- [Installing Loftware](#)
- [Installing RF Bar Coding](#)
- [Configuring the ODBC Data Source](#)
- [Referencing the DSN in RFGEN](#)
- [Establishing Bar Code Users](#)
- [Configuring Bar Code Business Rules](#)
- [Code Table Configuration](#)

General Processing

An RFGen middleware software module, the 'RFComserver' (RF Communications Server), is required to enable RF network communications. RFComserver is a Telnet Communications Server/Session Enabler that allows data collection devices to interact with your SQL database(s) in a multi-user mode.

The printing of bar code labels is provided by another third-party product named LLM-WIN32 from Loftware, Inc. LLM-WIN32 integrates a graphic label designer with enterprise-wide network printing functionality. LLM-WIN32 supports spooling and printing through Microsoft's Print Manager.



Supported Transactions

The RF Bar Coding module supports these transactions:

- Checkouts and Returns
- Stock Transfers
- Physical Inventory
- Consignment ("Keep Filled") Requests
- Reorder Revisions
- Stocking
- Receiving
- Multi-Step Receiving
- Label Printing

System Requirements

The system requires the following to function properly:

[Host Server](#)
[Network](#)
[Oracle Database](#)
[Client Devices](#)

Host Server

The following are to be considered minimum requirements for the RF Bar Coding host server.

| |
|--|
| IBM PC compatible - Intel architecture |
| Windows 95/98/NT/2000/XP |
| Not less than Pentium II w/256KB cache |
| Not less than 200MHz |
| Not less than 64MB + 4MB per expected user |
| The components of RF Bar Coding require only minimal disk space. |
| Must support the TCP/IP protocol. |

Network

Your network must support the TCP/IP protocol.

You'll need one IP address for the server and one for each handheld bar coding scanning device.

Both the Oracle Utilities Work and Asset Management database and the RF equipment must be accessible to the RF Bar Coding host computer over the network.

Note: The Software printer must have a fixed IP address as a network printer for the printing to work correctly. Bluetooth technology is not supported.

Oracle Database

RF Bar Coding is compatible with Oracle9i Enterprise Edition Release 9.2.0.1.0 or above.

Because of ODBC limitations, however, RF Bar Coding cannot be used with earlier versions of Oracle 9i.

Database Scripts

In order to print issue tickets from your handheld device, you must install the SRW database package shipped with the Oracle Reports product. Install the srwAPIins.sql and srwAPIgrant.sql scripts which are delivered in <Oracle Home>\reports\admin\sql. For more information on installing the SRW database package, please refer to Oracle Reports documentation which can be accessed from http://download.oracle.com/docs/cd/B14099_17/bi.1012/b14048/pbr_evnt.htm

Until the SRW package is run, the stored database procedure SDBP_RFGEN_PRINT is invalid.

Client Devices

Please contact your hardware manufacturer or provider for help configuring your RF hardware.

The RFGen product used by RF Bar Coding for interfacing with client hardware purports to support a wide range of RF devices, including those from the following manufacturers:

1. Intermec
2. Symbol
3. Teklogix
4. Percon
5. Telxon
6. Hand Held Products

We make no recommendation regarding hardware or software compatibility in regard to RF Bar Coding. However, the client devices used must support:

1. TCP/IP
2. TelNet
3. VT100 or VT220 terminal emulation

Note: You need to configure the handheld to VT220 in order for the function keys F5 - F12 to work. VT100 does not support the function keys F5 - F12.

Compatibility

RF Bar Coding is currently certified as compatible with RFGen Versions:

| RFGEn Version | WAM Version |
|-------------------------|--------------------|
| 3.0.1.04 | 1.7.15.x |
| 3.2.1.1 | 1.7.15.3.x |
| 3.2.1.16 | 1.8.1.x |
| 3.2.1.28 | 1.9.x |
| Software Version | WAM Version |
| 9.5 | All Versions |

Installing RFGEN

The RFGen CDROM version 4.0 is set to 'autoplay' when the CD is inserted into your CDROM drive. If a software loading menu does not appear, click Start, then Run, then open 'CDSetup.exe' on your CDROM drive. A menu selection is provided for each module to be loaded. Normally, the RFGen software is loaded to the "\\Program Files\\RFGen" directory.

Before loading the RFGen products, however, you must install the Oracle ODBC 9.02.00.00 or above and the Microsoft Data Access components. ODBC is used to interface with the various databases in the system, while the Data Access components provide implementation-specific database access capabilities to the RFGen products. Both of these must be installed prior to attempting the installation of the RFAssistant and RFComserver.

How to Install RFGen

Follow these steps from the RFGen Setup screen. When installing on an NT platform, one must have 'Administrator' privileges to successfully install RFGen.

1. **Click on Install Products.**
2. **Click on RFGen Programmers Assistant.**

Choose your brand of RF hardware, and follow the on-screen instructions.

3. Click on RFGen Communications Server.

Follow the on-screen instructions to install RFComserver. Select your brand of RF Hardware when prompted.

RFAssistant

The RFAssistant software module requires at least one RF data form, one menu, and one RF user. The installation program creates a database installed called RFGEN.MDB, which meets these basic requirements.

RFComserver

When installed, the RFComserver automatically starts as a background task when you boot your computer system.

RFComserver enables RF Bar Coding to work in a multi-user mode with your RF network. Technically, RFComserver is what is known as a 'Telnet Server.' A Network Administrator (program) selection is available on the RFGen menu to view and manage the workings of the RFComserver.

You must configure your RF devices (or controller) to telnet to RFComserver, either directly, or through a controller. Your RF devices/scanners must be set to emulate VT100 or VT220 (recommended) terminals. If you need help configuring your RF hardware, contact your hardware manufacturer or provider.

After your RF hardware is configured for Telnet communications, and when RFComserver is active, you can login to your database via Telnet from your RF device. The only software that is required to be on your remote device is TCP/IP Telnet, with a VT terminal emulator (VT100 or VT220). For more information, see the RFComserver documentation.

The RFComserver software enables the objects (forms, menus, and users) created for RF Bar Coding to work remotely, via a client-server RF network, with your selected RF devices. RFComserver relies on the fact that you have configured your RF devices (such as those offered by Intermec, Norand, UBI, Symbol, Teklogix, Handheld and Percon) as wireless telnet clients for a PC-based Win 95/98 or NT system.

The RFComserver software module must be loaded onto the same computer system that contains the RFAssistant software. You will need an authorization code to permanently install the RFComserver. Call RFComserver within seven (7) days of installation to receive your permanent activation number.

After you have loaded the RFComserver, you should reboot your computer. When your system reboots, if you selected the 'automatic start option', the RFComserver will automatically be started as a windows task. If you wish, the RFComserver can be started manually by running the RFAdministrator.

RFAdministrator

The RFAdministrator allows you to see, view, and manage the sessions running under the RFComserver. The RFAdministrator Authorization menu selection is used to permanently install the RFGen Software with the number of users that have been licensed from the DataMax Software Group.

How to Start the RFAdministrator from the Windows Desktop

1. **Select Programs from the Start menu.**
2. **Click on RFGGen.**
3. **Click on RFGGen Network Administrator.**

The RFAdministrator starts the RFComserver if it is not already running.

Installing Software

The Software LLM-WIN32 family of products requires a hardware license "key" in order to print labels. The key is included in your package. For the hardware license key to be recognized on Windows NT, you must be logged in as the Systems Network Administrator when you run the setup program. After the setup is complete, you may reboot and log on as a normal user.

The license key must be installed on any LPT (Parallel) port on your PC or network server. The key must be attached to the parallel port, even if you are using a serial bar code printer. The arrow on the key points toward the PC when the key is correctly installed. If you have a laser or dot matrix printer, attach the key to the PC and then plug your Centronics parallel printer cable into the key. The key will not interfere with the normal operation of the printer. For more information about installing the key, visit Software's website at: <http://www.loftwareinc.com/> or www.llmwin.com.

LLM-WIN32 requires Windows 95/98, Windows or NT 4.0/NT5.0. Novell users must have a version of Novell that supports long file names.

All programs are installed by the SETUP.EXE program that starts automatically when the Software CD is inserted. If you wish to do a "quick install" of the ActiveX Control, WatchDog-32, WatchDog-NT or the core LLM-WIN32 product, you can also run the SETUP.EXE programs from their respective directories on the CD.

Choose a local installation if you intend to use the LLM-WIN32 product on an individual PC. All application files and configurations will also be stored on this PC. Even if you choose a local install, you may choose to share your labels and data with other PC's on your network. Select Options / File Locations from the Software menu for setting default shared directories. Local installs are the easiest way to get LLM-WIN32 up and running in the shortest period of time.

Before performing any install, make sure your hardware key is plugged into your parallel port as described in the previous section. Setup will detect the key and make the appropriate settings in the software. If necessary, it is also possible to set the hardware key after installing as described in the Software manual.

WatchDog-32, WatchDog-NT, and ActiveX Controls must be installed separately, and on the local machine.

How to Install Software

1. **Place the Software CD in your CD-ROM Drive.**
Autorun launches the setup program. If autorun fails to launch, click on SETUP.EXE in the root directory of the CD-ROM.
2. **Click on Install Products.**
3. **Click on Install LLM-WIN32 to launch the core setup program.**
4. **Re-boot your computer when prompted.**

All files are installed to the Program Files\LLMWIN32 and Windows\System folder by default. The programs can run "stand alone" with no server involved. Even though this is a local install, file locations can be set on each PC for sharing serial numbers, labels, databases and images with other PCs. You may change file locations in design mode by choosing Options / File Locations.

Configuring Printers

Before you can print labels, you must configure a printer and assign it to one of the available print queues. You configure printers and set the active printer(s) using the Configure Printers dialog box. To open the Configure Printers dialog box

- Select Printers from the Software file menu, or
- Click on the Printers button from the Test Print window.

Notes

Always use Software drivers when available. Only use third party drivers when Software does not have a native driver for your printer.

The Software printer must have a fixed IP address as a network printer for the printing to work correctly. Bluetooth technology is not supported.

The Configure Printers dialog box lists both Available Printers and Configured Printers.

Available Printers are printers that have installed printer drivers. This list includes any thermal/thermal transfer bar code printers and the Software Windows printer installed by LLM-WIN32. If you have added Generic Text Drivers for Spooling through print manager, they are also shown.

Configured Printers are printers that have been assigned a connection (port, baud rate, parity, etc.) and have been setup for options which are unique to the selected printer. It also includes Windows printers and third-party drivers available from your Control Panel. A configured printer is a totally defined printer, ready to be used for printing. You can have any number of configured printers as you want.

How to Configure a Printer

1. Select the printer to configure from the list of available printers.
2. Click the Add New Printer button.
3. Define the printer connection, specifying the following options.

Printer Alias - You may optionally name your printer here. For instance, you may use a name like "Warehouse Printer 1" instead of the default name that would be something like: "Printer 1: Intermec 3400B on COM1". This is especially useful if you are using WatchDog-NT with the status tree view enabled.

Port - Choosing a specific port limits your printing capability to those printers attached locally to the server itself. Typically, you will want to make the label printing capability distributed among several printers throughout the warehouse, or to printers in accessible areas (leaving the server in a secure area). However, if you expect to use only one printer and you expect to place the server in an accessible area (not advised), you may select a specific printer port.

You can choose a parallel port (LPTx), or a serial port (COMx). The available list of ports will depend on your PC's hardware and installed drivers. Consult the Software manual or your printer documentation for printer setting information.

Print Manager/Spooling - It is recommended that you use the Windows Print Manager to make remote printing available. Print Manager/Spooling sends print jobs to local or networked printers using the window's Print Manager to spool files to the port. Enabling Print Manager/Spooling instead of printer Port allows addressing shared printers across the network and fast job handoff since Print Manager queues the requests and the label printing software becomes immediately available to service the next request.

COM ports allow 2-way communication with the printer. This is useful if you want to receive messages when the printer is out of labels or ribbon.

4. Run Printer Setup for the selected printer.

In addition to a printer model and connection information, a configured printer also contains printer setup information. This information is unique to the printer you have selected. These settings apply to all labels designed for this configured printer.

How to Set a Configured Printer as an Active Printer

After you have configured one or more printers, you need to tell LLM-WIN32 which printers you want to use as the active printers. You can have up to four active printers defined at a time with LLM-WIN32.

1. Open the active printer list.

You do this by selecting Printers from the Software file menu.

2. Choose the current active printer if you want to change active printers.

3. Choose a configured printer you wish to make active.

When you do, the button in the Configured Printers area changes to "Assign to printer n" where n is the printer you selected.

If the printer has not been configured, you must configure it first. Refer to the instructions at the beginning of this section for information on configuring printers before assigning them.

4. Click on the Assign to printer n button.

The name of the selected printer now appears in the active printer list.

How to Test a Printer

It is advisable to test the configuration by printing to the printer just configured. You can use the sample labels Software supplies for this purpose.

1. Double-click on the LLM-WIN32 / Label Design icon.

2. Open one of the provided Label files (*.lwl).

3. Click on the Test Print icon in the standard toolbar.

4. Choose which of the assigned printers you want to use.

If the program displays a "Demo Mode" warning message, the key has not been installed properly. This is okay if you intend to run the program in demo mode, otherwise review the procedure for attaching the key. For additional information on installing local and network keys go to Loftware's Internet Home Page: www.loftwareinc.com or www.llmwin.com.

Installing Bar Code Fonts

Conduct an internet search on "free barcode font" to download a font set to use with the Oracle Utilities Work and Asset Management bar coding functionality. Install the font on your application server and on the client machines then set business rules so that fonts are used on barcode reports.

Note: You must install the fonts on both the application server and on the client machine.

How to Install Fonts in the Windows Operating System

To install the fonts, do NOT simply copy them to the C:\Windows\Fonts directory. Even though the fonts appear to install correctly, they may not be visible on the barcode type reports.

1. **Open the Control Panel (Start> Settings> Control Panel).**
2. **Select Fonts.**
3. **Select File -> Install New Font.**

The “Add Fonts” dialog box opens.

4. **Find the location where you stored the downloaded barcode fonts.**
5. **Make sure the “Copy fonts to Fonts folder” check box is checked.**
6. **While holding down the Ctrl key, select all of the fonts.**
7. **Click the OK button.**

The font installation is complete.

8. **Restart if necessary.**

Setting the system to use the font on Barcode Reports

Once the fonts are properly installed configure the following business rule settings:

Web Configuration Business Rule - Enter the name of the installed font in the Setting field for the REPORTS BARCODE FONT rule key.

Default Directories Business Rule - Enter the BAR CODE LABEL DROP DIRECTORY rule key to indicate the server where the barcode files are sent.

Installing RF Bar Coding

The RF Bar Coding installation consists of a Server Installation and a Client installation.

Database Server Installation

The database objects for Oracle Utilities Work and Asset Management must be installed in your database before you install RF Bar Coding.

1. **Copy the files from the Release\Server folder to any directory on the server.**
2. **Run the script BARCODE40.SQL at the SQL*Plus prompt.**

```
SQL> @barcode40.sql
```

This script can be executed for both upgrades and first time installations. This script will install all Oracle Utilities Work and Asset Management Bar Code scripts to Version 4.0. It creates the output file barcode40.log which you should review for errors.

3. **When prompted, enter the name of the person performing the installation.**

This is retained for auditing purposes.

4. **Recompile all objects until there are no invalid objects.**

```
SQL> @recompil.sql
```

Client Installation

1. **Shutdown any RFGGen Services and servers.**
2. **Locate the folder where the RFGGen program is installed.**

Normally RFGGen is installed at C:\Program Files\RFGGen.

3. **Rename the existing RFGGen.mdb file to RFGGen.mdb.old or similar.**

4. **Copy the file RFGen.mdb from the Release\Rfgen folder to the RFGen folder on the client.**

Start all RFGen Services and Servers.

Configuring the ODBC Data Source

RFGen requires an ODBC Data Source Name (DSN) in order to successfully connect to your Oracle database.

Before configuring an ODBC DSN for the Oracle Utilities Work and Asset Management database, you must install the Oracle client and networking components. Of particular importance are the tnsnames.ora, sqlnet.ora, listener.ora and “sqlnet” files. Refer to your Oracle documentation for instructions on installing these Oracle products.

How to Configure the ODBC Driver

1. **Click on the ODBC Data Sources icon.**

You can find The ODBC driver icon in the Windows Control Panel or the Administrative Tools folder. When you click on the icon, the ODBC Data Source Administrator window opens.

2. **Click on the System DSN tab.**
3. **Click on the Add button to create a new Data Source.**
4. **Choose the Oracle ODBC driver.**

The Oracle ODBC driver Version 9.02.00.00 (or higher) is required for RFGen Network Administrator 3.0.1.04.

5. **Click the Finish button.**

The setup screen opens where you provide following values:

Data Source Name (DSN) - Enter any name meaningful to your organization. You will need to refer to this name when you configure RFGen to connect to this data source.

Description - Enter descriptive text to describe the data source.

User Name - the User Name must be a defined and authorized user of the Oracle Utilities Work and Asset Management database. The Oracle DBA will normally establish an account for the RF Bar Coding module and the user id thus created would be supplied here.

Server - The Server must be the name of the database.

Referencing the DSN in RFGEN

Once the ODBC database connection parameters are setup, you'll need to run RFGen's RFAdmin.exe program in order to reference the new DSN.

How to Reference the DSN

1. **Locate RFAdmin.exe, and run the program.**
1. **From the Configuration menu option, select Database Connection.**
2. **Enter the Name/ID, Data Source, and Database.**

The name and Data Source refer to the DNS that you created in the previous section.

3. Set the Connect Using parameter to ADO.

The default is ADO (ActiveX Data Objects). If you find that you have problems connecting or experience issues with data, set this value to RDO (Remote Data Objects).

RDO is mostly used for connections to SQL servers. While can be used to access a wider variety of data sources.

4. Select a provider.

5. Enter the User ID and Password.

These are the same credentials used to log on to the Oracle Utilities Work and Asset Management system.

6. Click Save.

Establishing Bar Code Users

Privileges for bar coding users must be established in Oracle Utilities Work and Asset Management using the User Profile module. To access the User Profile module, select System Configuration from the Administration Menu and click on User Profile.

How to Add Bar Coding Privileges for a User

1. Open the user profile for the appropriate user.
2. Click on an empty line in the Key Name column or click on an existing Key Name value and click on the Insert icon.
3. Type RFGEN in the Key Name column.
4. Click on the blank space under Key Value and just to the right of RFGEN.
5. Enter the default Storeroom ID for this user.
6. Enter any additional storerooms in the adjacent Key Value columns to the right.

Users can have more than one default storeroom defined in their user profile, but can only work in one storeroom at a time. All work done during a given bar coding session is restricted to the Storeroom selected at logon. If the user wants to work on records in another Storeroom, you must logoff and begin a new session to select the new Storeroom.

7. Click on the Save Icon.

The system saves the User Profile with the Bar-coding privileges you have established.

Responsibility Setting

List the Bar Code Print Label function in the Responsibilities of users who will need to access this functionality from the Multi-Step Receiving module.

Configuring Bar Code Business Rules

Much of the RF Bar Coding functionality is controlled by business rule settings. To configure these rules, set the key values as discussed below for the following rules:

Bar Coding Checkout Rule

The Bar Coding Checkout rule determines whether the temporary upload table is emptied prior to next upload of checkout/return data from the handheld device, or if new entries are appended to any prior error entries. Enter ON in the "OPTION STATUS" column to allow records with errors to be kept in a temporary table. Enter OFF in the "OPTION STATUS" column to remove the remaining records from the temporary table prior to the next upload.

Bar Code Configuration Rule

The Bar Code Configuration rule determines which options appear on the bar code main menu. Options set to ON appear on the handheld device.

Bar Code Report Module Rule

The Bar Code Report Module rule determines which report number is to be executed on each of the Printing sub menu items in the handheld device.

Bar Code Reports Gateway Rule

The Bar Code Reports Gateway rule determines the database connection to be used when generating a report from the handheld device. The SID must be the same as the connection name set in the device.

Checkout Allowable Charge Type Rule

This rule is used to control the charge types that are allowable for Stock Checkouts. A setting of ALLOW for a Charge Type makes it available on the checkout screen. A setting of DISALLOW will exclude the Charge Type from the checkout screen.

Default Directories Rule

The setting of the Bar Code Label Drop Directory rule key determines where the queued files are stored when a user prints labels. Enter a valid drive or network location.

RFGen Bar Coding Setup Rule

Select options in the RFGen Bar Coding Setup rule to configure RF Bar Coding to conform to your organization's business practices.

| KEY Name | Where Used | Description |
|----------------------------------|---------------------|--|
| Adjust Physical Inventory | Physical Inventory | Determines if stores adjustments processing is allowed from the handheld device during physical inventory when. Options are YES or No. |
| Display Expense Codes | Checkouts / Returns | Determines if stock expense codes are visible on the handheld device during stock checkouts/returns. Options are YES or No. |
| Hide Inventory Quantity | Physical Inventory | Determines if the actual inventory quantity is hidden during physical inventory. Options are YES or NO. |
| Old Stock Code Field | System-Wide | The name of the field (UDF) in SA_CATALOG table where old stock codes are listed. Options are any UDF from ATTRIBUTE1 to ATTRIBUTE10. |

| KEY Name | Where Used | Description |
|----------------------------------|---------------------|---|
| Old Stock Code Processing | System-Wide | Indicates if characters are to be stripped while reading the old stock code with the handheld device. Options L (strip characters from the left) or R (strip characters from the right), followed by the number of characters to strip, or NONE. |
| Override Employee Error | Checkouts / Returns | Indicates if transactions can proceed even if an incorrect employee number is entered for receiving employee during checkouts/returns. Issuing employee number/user name is used whenever needed instead. Options are YES or NO. |
| Override Expense Codes | Checkouts / Returns | Determines if users are allowed to change default storeroom stock expense codes during checkouts/returns. Options are YES or NO. |
| Stock Code Order By | Checkouts / Returns | Defines the sort order for the list of values on the Stock Code field in the Stock Checkout detail. The options are STOCKCODE and BIN. If the option is set to STOCKCODE then the list is displayed by stock code in ascending order. If the option is set to BIN then the list is displayed in ascending order by primary bin location as defined in the storeroom for the stock code. |
| Use Old Stock Codes | System-Wide | Enable the use of old stock codes to facilitate transition to the new system implemented within Oracle Utilities Work and Asset Management. Options are YES or NO. |

Web Configuration Rule

REPORTS BARCODE FONT - Enter a value in the setting field for the Reports Barcode Font rule key to specify the font to be used on reports that include a barcode field. The font that is entered should be available in your system fonts. You can find fonts to use by searching the internet for “Free Barcode Fonts.”

Code Table Configuration

Define printer labels by entering values in code table 80.

Cue Cards

Basic Operations

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- How to Log Off
- How to Initiate a Checkout/Return session
- How to Checkout a Stock Item against a Work Order Task
- How to Return a Stock Item against a Work Order Task
- How to Checkout a Stock Item against an Asset
- How to Checkout a Stock Item against a Checkout Request
- How to Create a Stock Transfer
- How to Add Stock Items to a Transfer Request
- How to Issue a Stock Transfer
- How to Process a Physical Inventory Record
- How to Process a Keep Fill Request or a Reorder Review Request
- How to Print Issue Tickets
- How to Print Labels
- How to Print Receiving Reports
- How to Add Items to the Storeroom
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- How to Start the RFAdministrator from the Windows Desktop
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- How to Set a Configured Printer as an Active Printer
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