

eWarehouse User Guide

Introduction

Welcome to eWarehouse! Once you install eWarehouse, your Windows Mobile (Pocket PC) scanner will be your warehouse personnel's portable device to collect inventory data.

Versions of eWarehouse

There are two different versions of eWarehouse:

- Basic
- Advanced

The Basic version of eWarehouse includes the following operations:

- Physical Count
- Warehouse Receiving

The Advanced version will support all operations included with the Basic version, and in addition includes:

- Multi-Bin Operations
- Stock Status Inquiry
 - By Item
 - By Bin
- Inventory Transfer between Bins
- Item Barcode Printing

The Advanced version requires Elliott web services to function. The web services will allow seamless data transfer between eWarehouse and Elliott without a manual interface as the Basic version requires.

Hardware and Software Requirements

Hardware

eWarehouse is designed for Motorola (Symbol) MC9000 series hand held scanner devices. We support the Windows Mobile (Pocket PC) O/S and do not support the Windows CE version. There are many different models that will fit these requirements. We do not recommend a specific model because model number change frequently. In addition, which model is best for your implementation depends on your specific needs. eWarehouse advance will also require your warehouse to have wireless coverage (at least partial coverage). Whether to have full or partial wireless coverage depends on your budget.

Software

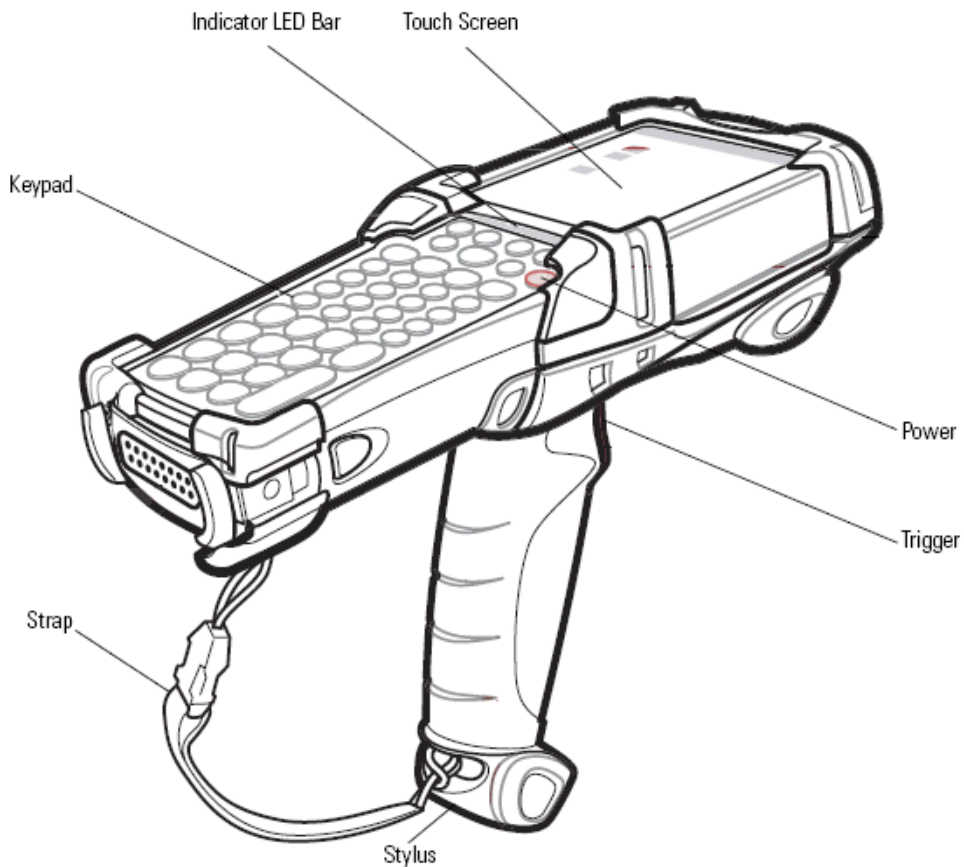
eWarehouse requires Elliott V7.4 or higher. eWarehouse Advanced requires Elliott web services to operate. eWarehouse Advanced is designed to operate with Elliott's Multi-Bin feature which is an add-on

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to Elliott. eWarehouse Advanced may be used without Elliott Multi-Bin but the value will be significantly reduced. Seagull Scientific's Bartender enterprise label software is required to print item barcode labels from eWarehouse. In addition to a license for Elliott web services, you will also need a PSQL Internet/Intranet connector license to support the additional barcode devices.

Getting to know your Symbol Scanner

The following diagram describes some of the features of the scanner.



Power – Press the power button for 1 second to power off the scanner. If the scanner stops responding to input, reset it by performing a warm boot. To perform a warm boot, hold down the power button for approximately five seconds. As soon as the scanner starts release the power button.

Trigger - Used for scanning barcodes.

Touch Screen – eWarehouse uses the touch screen for user input.

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Stylus – Used for touch screen activity.

Keypad – eWarehouse can accept keypad operation for inputting letters and numbers.

Getting to know eWarehouse

The following image describes some of the features of eWarehouse.

The screenshot shows the 'Item Inquiry' screen. At the top, there is a blue header bar with the Windows logo, the text 'Item Inquiry', a signal strength icon, a speaker icon, the time '9:55', and an 'ok' button. Below the header, the item details are displayed: 'Item #: 1 148 240 052', 'COMPANION FLANGE, NO HOLES', and 'STD BORE KW'. A table with three columns is shown: 'Loc', 'Qty OH', and 'Qty Alloc'. The first row of data shows 'Default', '4', and '0'. Below the table is a navigation bar with a left arrow, a central menu icon, and a right arrow. Underneath, there are three buttons: 'Basic', 'Loc', and 'Multi Bin'. A text input field contains 'Item #: 1 148 240 052' and a 'Go' button is to its right. At the bottom, there is a 'Menu Exit' button with a keyboard icon and an up arrow.

| Loc | Qty OH | Qty Alloc |
|---------|--------|-----------|
| Default | 4 | 0 |

Menu – Allows you to navigate to another form of the program anywhere the menu is available.

Exit – Exits the entire eWarehouse program from any screen.

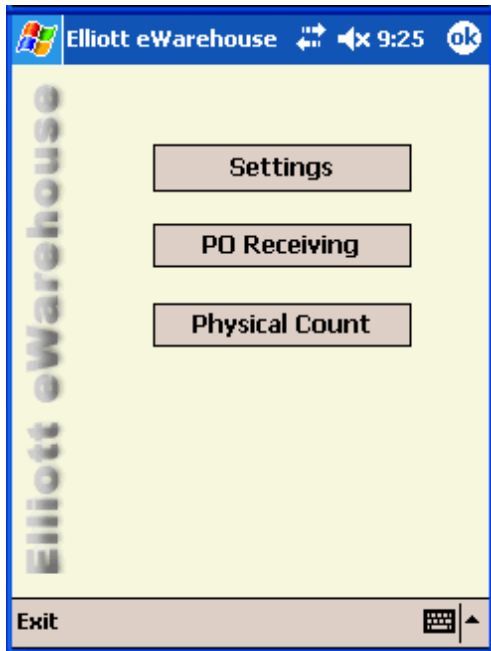
Ok – Closes the current form you are viewing and will return you to the login page. If you click OK from the login page the program will exit.

Getting started with eWarehouse

To run eWarehouse click on *Start*, then *Programs*. Open the File Explorer by clicking on the *File Explorer* icon. Click *Program Files*, then click *eWarehouseCab* and finally click *eWarehouse*.

The first time you start eWarehouse the program will appear as the image below shows.

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Before you can run the program you need to setup your options. To do this click on the *Settings* button.

eWarehouse Settings

On the Settings form there are five tabs:

About – Provides the operating system and software versions currently installed.

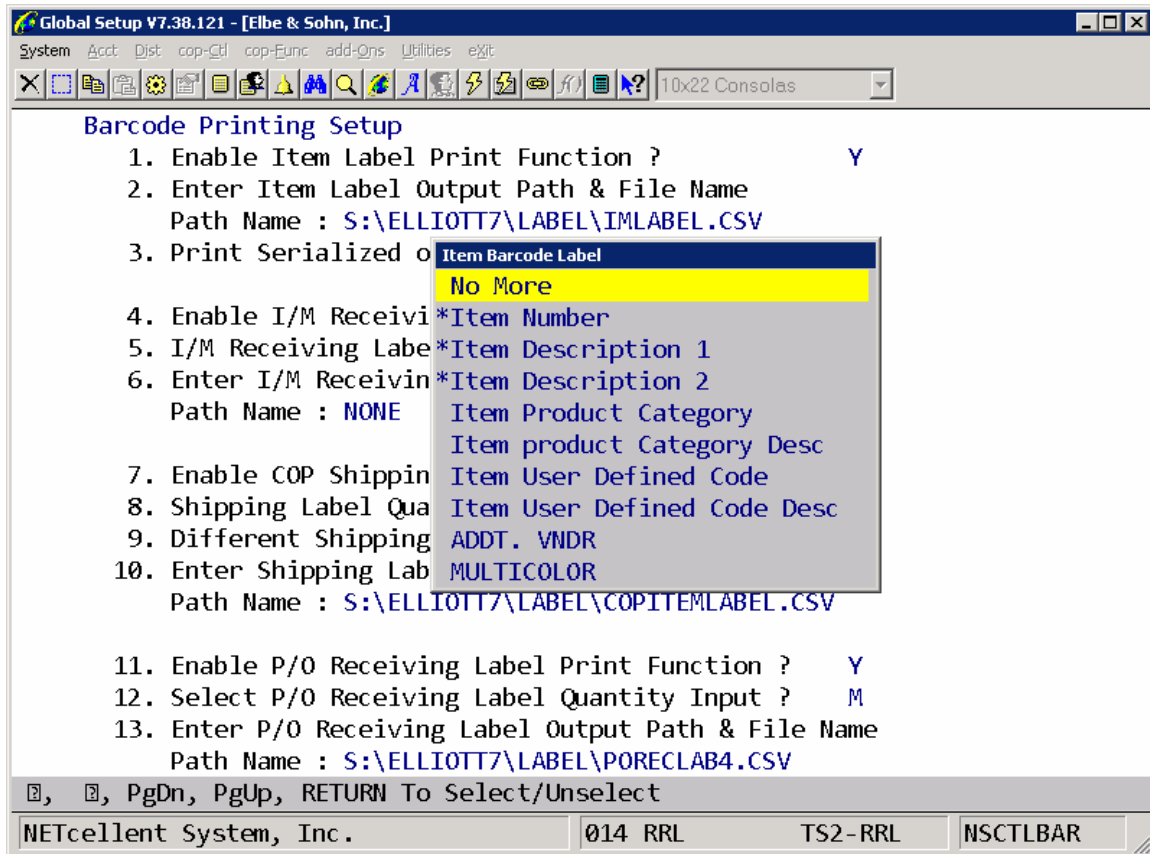
Database – Provides the database statistics.

Settings – A password must be entered to view this option. Provides options to setup the configuration of your eWarehouse.

Item Settings – A password must be entered to view this option. Provides you with the options to determine which item fields to display on item inquiry form. Only used for eWarehouse advanced.

Barcodes– A password must be entered to view this option. To use the item barcode function you must have Seagull Scientific's BarTender software. Indicate the fields to print on the item bar code with a checkmark and then click the *Save* button. The same fields need to be selected as in Elliott's Barcode Printing Setup. A sample Elliott setup screen is shown below.

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Please note Product Category Description, User Defined Code Description and Serial Number will not be printed on the item bar code label because the data is not updated on the scanner.

To print the following fields on the barcode they must be synchronized to the scanner by selecting them in the Item Settings tab:

- Item_Prod_Cat – Product category
- Item_User_Def_Code – User defined code
- Item_Note_1
- Item_Note_2
- Item_Note_3
- Item_Note_4
- Item_Note_5
- Item_Price
- Item_Sale_Price
- Item_Sale_End_Date

Configure eWarehouse Advanced

To enable eWarehouse Advanced you need to check the *eWarehouse Advanced* checkbox on the *Settings* tab.

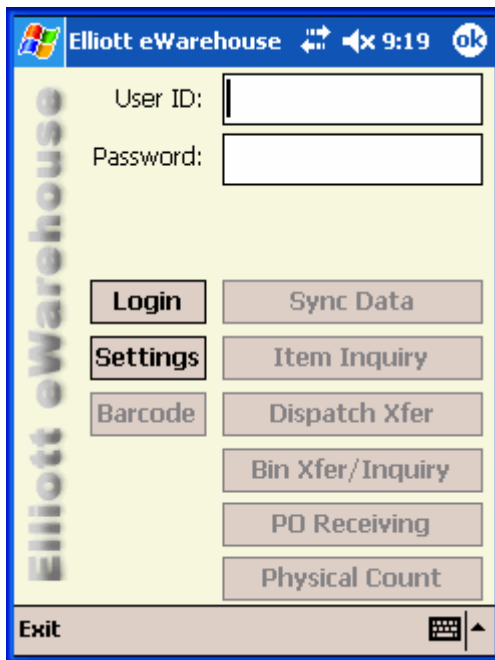
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Configure eWarehouse Basic

To use eWarehouse Basic be sure the *eWarehouse Advanced* checkbox is not clicked. The other options on the *Settings* tab and *Item Settings* tab do not pertain to the eWarehouse Basic version.

Running eWarehouse Advanced

Once you enable eWarehouse Advanced the image below will be your startup form.



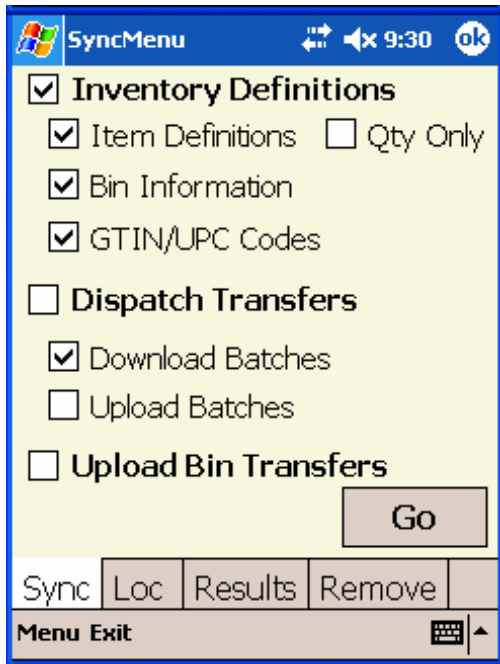
Login

To login you need to provide your Elliott User ID and Password. You may navigate from the User ID field to the Password field using the enter button or your stylus. Once you fill in your data press the *enter* key or use your stylus to click on the *Login* button. Next time you startup eWarehouse it will remember the user name of the last successful login.

Sync Data

Before you can begin processing data with eWarehouse you must first download data to your local scanner. Do this by clicking on the *Sync Data* button. You will then see the following form as the image below indicates.

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Sync Tab – On this tab you may check any data you would like to download.

Loc Tab – On the location tab select the warehouse locations for which you would like to download data from.

Click on the *Go* button on the *Sync* tab to begin your data synchronization.

The results tab will show you your status of the data synchronization. Please be patient as it will take several minutes to synchronize your data. (Estimate: Depending on your network performance, it may take 6 minutes to synchronize 2000 item records.)

If you have synchronized any data to your scanner that you no longer need you may remove it using the *Remove* tab.

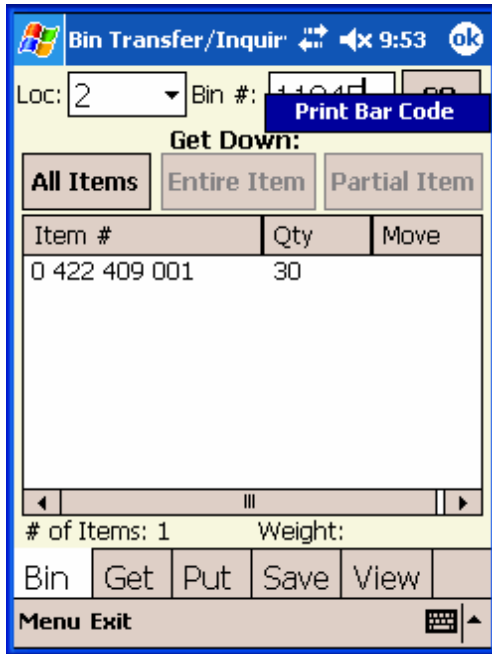
Once you are finished synchronizing data click on the ok button in the upper right hand to close this form. This will return you to the login startup screen. The data you choose to synchronize will determine which functions will be available for you to perform.

Barcode

The barcode form allows you to use BarTender to print barcodes to your printer. The scanner sends data via the web services to create a csv file for BarTender to read. BarTender then prints the barcode data

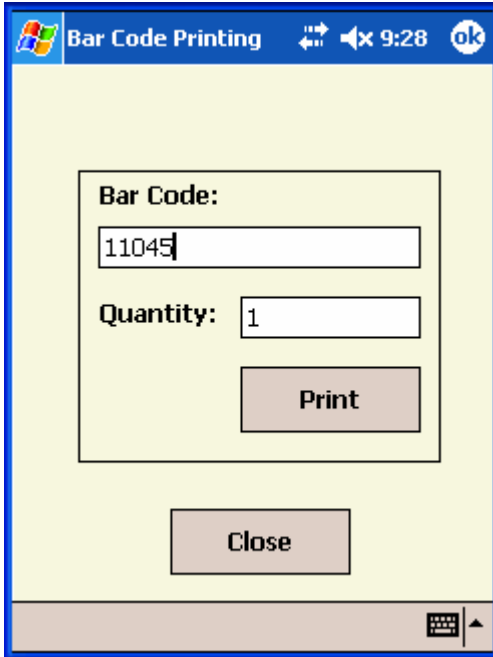
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to your configured printer. In addition to providing access to this function from the main form it is available from almost every text box and data list via a context menu. A sample image is shown below.



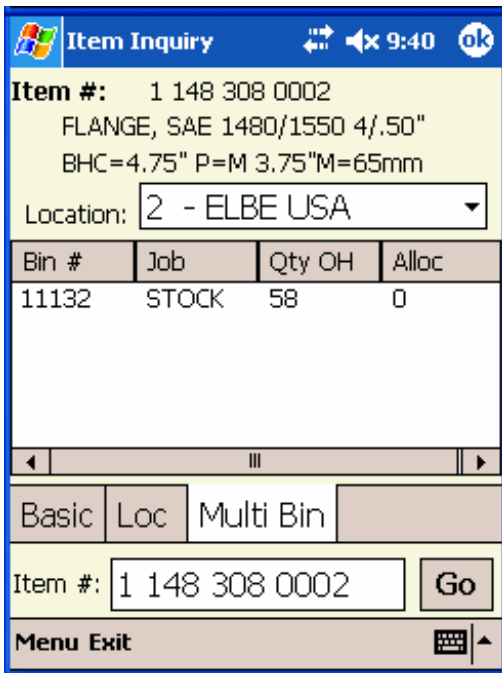
If the barcode data you provide is found to be an item number it will print the item bar code label. If the barcode data is not an item number it will print just a barcode label with the data you provide. You may choose the number of barcode labels to print by specifying the quantity. The image below shows this function.

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Item Inquiry

The item inquiry form allows you to enter an item number using text input or by scanning a bar coded item number.



Multi Bin Tab – This tab will show you all of the bins your item number is in including the quantity on hand and quantity allocated. Use the Location drop down list to view bin information for other warehouse

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locations. (Note: you must have synchronized the data for other warehouse locations if you wish to view the data.)

Loc Tab – This tab will show you the total quantity on hand and quantity allocated for each warehouse location this item exists.

Basic Tab – On this tab you will see the item file information for which you choose in the *settings* form.

At any time you may scan another item number bar code to view that item's information. Once you are done with this function you may use the upper right hand *ok* button or use the *Menu* to choose another function.

Dispatch Transfer

This function corresponds to the Elliott Inventory Transfer Processing, dispatch screen. It allows you to collect your bin information with out the need to write it on a transfer ticket for later manual data entry to Elliott. You instead scan each bin number for each item on the transfer ticket and once complete synchronize it back to Elliott. The startup screen for the Dispatch Transfer appears below.

| Batch | Desc. | User | T | S | Date |
|--------|--------|------|---|---|---------|
| M00003 | 018... | KIRK | M | N | 8/29/07 |
| M00004 | 017... | A... | M | N | 8/31/07 |
| M00005 | 017... | V... | M | P | 8/28/07 |
| M00006 | 018... | KIRK | M | N | 8/29/07 |
| M00007 | 017... | KIRK | M | N | 8/20/07 |
| M00008 | 018... | KIRK | M | N | 9/5/07 |
| M00009 | 017... | KIRK | M | N | 8/20/07 |
| M00010 | 018... | KIRK | M | N | 8/30/07 |
| M00011 | 017... | A... | M | N | 9/5/07 |

List Tab – This tab shows the dispatch transfer records based on the filter criteria. You can select the warehouse location, user and transaction type to filter the records. The user field is based on Elliott security. If the logged in user is able to see other user's batches the

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user field will list all of the user names that currently have batches. If the user is not able to see other user's batches only their name will be displayed in the user list.

The data shown on this tab is the batch id, batch description, user name, type which includes:

R - PO Receiving

S - Shipping

M - Materials

P - Production

I - IM Receiving

F - Manual Transfer

The status can be new, printed, or complete. The date displays in the last column unless the date is today, then time the record was created will be displayed.

The list tab also includes a context menu which provides the options for different actions.

Detail Tab – This tab is an information only tab that contains basic information about the batch record.

Process Tab – Once you select a batch you will be able to see the process data information. The items for this batch are listed along with the to/from bin, quantity and job number. When an item is highlighted, which can be performed by scanning an item or using the stylus, you are able to click the magnifying icon to see the bins the item is currently in. You can highlight the bin or scan a bin to provide the data. Once all of the data is provided you will be asked if you would like to mark the batch complete. If the "sync the batch when complete" checkbox is checked when you complete a batch it will be synchronized back to Elliott if a wireless connection is available. If wireless is not available you may use the *Sync Data* function to upload the batches back to Elliott at a later time when a wireless connection is available.

Msgs Tab – This tab is an information only tab that displays messages such as batch has been marked as complete or synchronized.

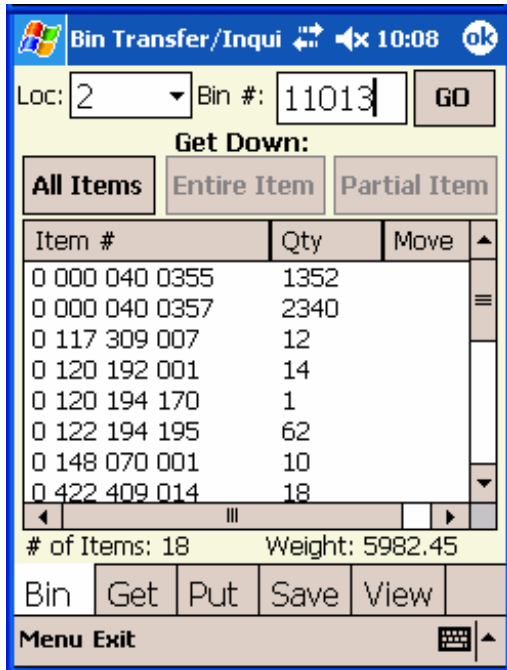
Bin Xfer/Inquiry

The bin transfer and inquiry allows you to perform maintenance and organization of your warehouse items by consolidating items to another bin or in away other way you see fit. You also have the ability

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to view all of the items in a bin, its number of products and the total bin weight.

Bin Tab – The location will default to your default warehouse location as determined in the *settings* form. You may choose to scan a bin or manually type a bin number. Once you click on the *GO* button the items in the bin will be listed. If no items are in the bin you will see the # of items will be zero. A sample screen is shown below.



The screenshot shows a software interface titled "Bin Transfer/Inqui" with a Windows logo, a speaker icon, and the time "10:08". Below the title bar, there are input fields for "Loc:" (value: 2) and "Bin #:" (value: 11013), followed by a "GO" button. Underneath is a "Get Down:" section with three buttons: "All Items", "Entire Item", and "Partial Item". A table displays a list of items with columns for "Item #", "Qty", and "Move". The table contains 8 rows of data. Below the table, it shows "# of Items: 18" and "Weight: 5982.45". At the bottom, there are buttons for "Bin", "Get", "Put", "Save", and "View", and a "Menu Exit" button with a keyboard icon.

| Item # | Qty | Move |
|----------------|------|------|
| 0 000 040 0355 | 1352 | |
| 0 000 040 0357 | 2340 | |
| 0 117 309 007 | 12 | |
| 0 120 192 001 | 14 | |
| 0 120 194 170 | 1 | |
| 0 122 194 195 | 62 | |
| 0 148 070 001 | 10 | |
| 0 422 409 014 | 18 | |

You may use the context menu, by holding down the stylus on any item number, to view stock information by selecting "View Stock Info". This will display each bin the selected item resides in and its job and quantity information.

At this time if you which to move items from this bin you may click the "All Items" button to move all of the items. If you want to move one or more item highlight an item with the stylus or scan an item barcode to highlight an item. You may then press the "Entire Item" button to move the entire item's quantity or "Partial Item" to specify the quantity to move. The move column will then become populated and the item will also be displayed on the *Get Tab*. You may repeat this process to move more items. You can then enter a different bin number to move items from another bin and repeat the steps above.

There is also a context menu on each tab. The menu contains the same action as the 3 buttons at the top of the tab. In addition you

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can perform such operations as print barcode, change quantity or move item/all items which moves the item to the previous tab.

Get Tab – Once you have chosen all of the items you'd like to move click on the *Get Tab*. All of the items you choose will be displayed on this tab. You can then choose which items to put away using the 3 buttons at the top of the form.

Put Tab – On this tab you enter/scan the bin you would like to move your items to. Once you scan a bin use the 3 buttons at the top of the form to move all, one or partial of an item.

Save Tab – On this tab you may review all of your data. If you have made any mistakes you may use the context menu to change the quantity of items or move items back to the *put tab*. If you have a wireless connection then you may choose to synchronize all items and bin transfer information back to Elliott. If wireless connection is unavailable then click the "Save" button to save this data to synchronize at a later time when a wireless connection is available. Doing this will create a batch with the user name and current date/time.

View Tab – this tab allows you to view any data you have saved and created a batch for. From this form you may choose to edit item records for a batch if any changes are needed. If no changes are required you may synchronize all of the batches or one batch at a time to Elliott.

PO Receiving

This function allows you to easily collect data from your warehouse for purposes of doing a PO Receiving. The image below shows the start up screen for this function.

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The screenshot shows a software interface for 'PO Receiving'. It features a blue header bar with a Windows logo, the text 'PO Receiving', a speaker icon, the time '10:03', and an 'ok' button. The main content area has a yellow background and contains several input fields: 'Receiver:', 'Vessel Inv/Doc#:', 'Shipped Date:', 'Arrival Date:', 'PO #:', 'Item #:', 'Qty:', and 'Inv/Doc#:'. A 'Save' button is positioned below the 'Inv/Doc#:' field. At the bottom of the form, there are three tabs: 'Receiving', 'Review', and 'Settings'. Below the tabs is a 'Menu Exit' button with a keyboard icon and an arrow pointing right.

Settings Tab - A password must be entered to view this option. This allows you to determine if you would like to request the following fields at the time of receiving data input:

- Receiver
- Vessel Inv/Doc#
- Shipped Date
- Arrival Date
- Inv/Doc#

Receiving Tab - This is the form to use to collect your PO Receiving data.

- Receiver: Field not required. A 3 character field to specify the user performing the receiving.
- Vessel Inv/Doc#: Field not required. You may scan this field or input it with the keypad.
- Shipped Date: Field not required. Acceptable formats are MMDDYY, MM-DD-YY, MM.DD.YY.
- Arrival Date: Field not required. Acceptable formats are MMDDYY, MM-DD-YY, MM.DD.YY.
- PO #: Field is required. You may scan or type the po number using the key pad. Acceptable formats are 999999, 99999999, 999999-99.
- Item #: Field is required. You may scan or type the item number using the key pad. If using eWarehouse Advanced a validation is performed to make sure the item number is valid.

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- Qty: A numeric quantity is required.
- Inv/Doc #: Field not required. You may scan or type the number using the key pad. No validation is performed on this field.

Once all of the data is entered click the *Save* button. The first four fields will remain populated if they are being used. You may continue entering data for this vessel. Once you are done with this vessel select the vessel Inv/doc # field and enter new data.

Review Tab – This tab allows you to review your PO Receiving data by PO number. Select a PO # in the drop down list to view data collected for that PO. If you have made a mistake you may use the stylus to display the context menu by holding the stylus down over one of the item numbers. The stylus gives you the options to change the quantity for the highlighted item or remove the item. You may then go back to the *receiving tab* to reenter the deleted item if needed.

Once you are done collecting and reviewing your PO receiving data press the *Send Data File* or *Create File* button.

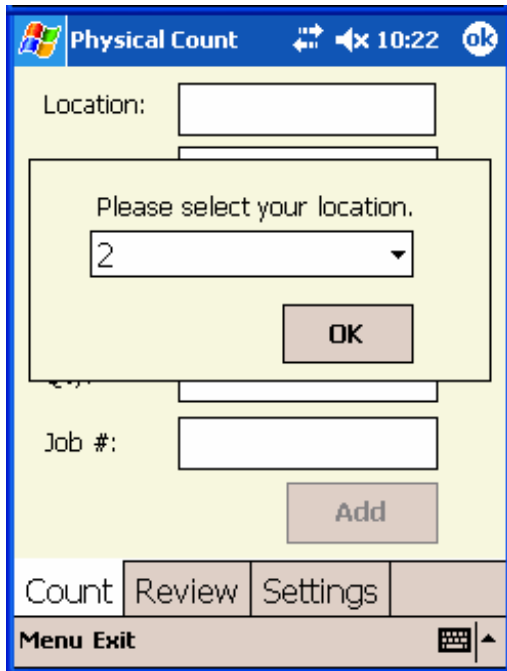
- *eWarehouse Advanced* – Once you click the *Send Data File* button you will see the message, "PO Receiving file data has been sent. Would you like to delete your local PO receiving records?" Choose *Yes* to delete your local data or *No* if you wish to be able to send this PO receiving text file again with the same data. The CSV file now resides on your server in the location specified in the web service configuration. You may now use the Elliott Warehouse Receiving Import function to import your data. See Elliott help for more information on the import process.
- *eWarehouse Basic* - Once you click the *Create File* Button, you will see the message, "PO Receiving file: 'My Documents\POReceiving.csv' has been created. Would you like to delete your local PO receiving records?" Choose *Yes* to delete your local data or *No* if you wish to be able to create this PO receiving text file again with the same data.

To transfer the POReceiving.csv file to your local machine see the section below, *Transferring files from scanner to PC*.

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Physical Count

This function allows you to easily collect data from your warehouse for purposes of doing a physical count. Before you begin to collect data you will be prompted to select the warehouse location you are performing a count for as shown in the image below.



Settings Tab - A password must be entered to view this option. This allows you to determine if you would like to require the physical count tag field to be entered and a job number at the time of physical count.

Count Tab – This is the form used to collect your physical count data.

- Location: Select which warehouse location you are performing your count form.
- Bin #: You may scan the bin number or input it with the keypad. If you are using the eWarehouse Advanced a validation is performed to make sure this is a valid bin number.
- Tag #: Settings allow you to determine if this field is required. Duplicate tag numbers are not allowed.
- Item #: You may scan or type the number using the keypad. If using eWarehouse Advanced a validation is performed to make sure the item number is valid.
- Qty: A numeric quantity is required.
- Job #: Settings allow you to determine if this field is required. No validation is performed on this field.

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Once all of the data is entered click the *Add* button. The bin number will remain populated. Continue entering data for this bin. Once you are done with this bin select the bin field and enter a new bin.

Review Tab – This tab allows you to review your physical count data by bin number. Select a bin # in the drop down list to view data collected for that bin. If you have made a mistake you may use the stylus to display the context menu by holding the stylus down over one of the item numbers. The stylus gives you the options to change the quantity for the highlighted item or remove the item. You may then go back to the count tab to reenter the deleted item if needed.

Once you are done collecting and reviewing your physical count data press the *Send Data File* or *Create File* button.

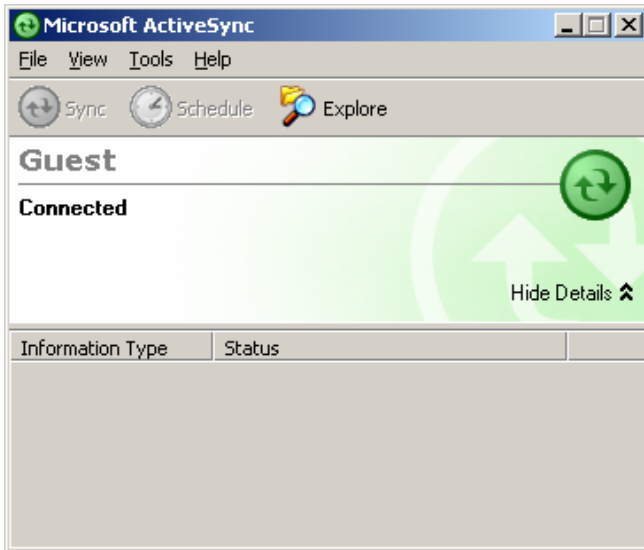
- *eWarehouse Advanced* – Once you click the *Send Data File* button you will see the message, “Physical Count file data has been sent. Would you like to delete your local Physical Count records?” Choose *Yes* to delete your local data or *No* if you wish to be able to send this physical count text file again with the same data. The CSV file now resides on your server in the location specified in the web service configuration. You may now use the Elliott Physical Count Import function to import your data. See Elliott help for more information on the import process.
- *eWarehouse Basic* - – Once you click the *Create Data File* button you will see the message, “Physical Count file: ‘My Documents\InvCount.csv’ has been created. Would you like to delete your local physical count records?” Choose *Yes* to delete your local data or *No* if you wish to be able to create this physical count text file again with the same data.

To transfer the InvCount.csv file to your local machine review the section that follows, *Transferring files from scanner to PC*.

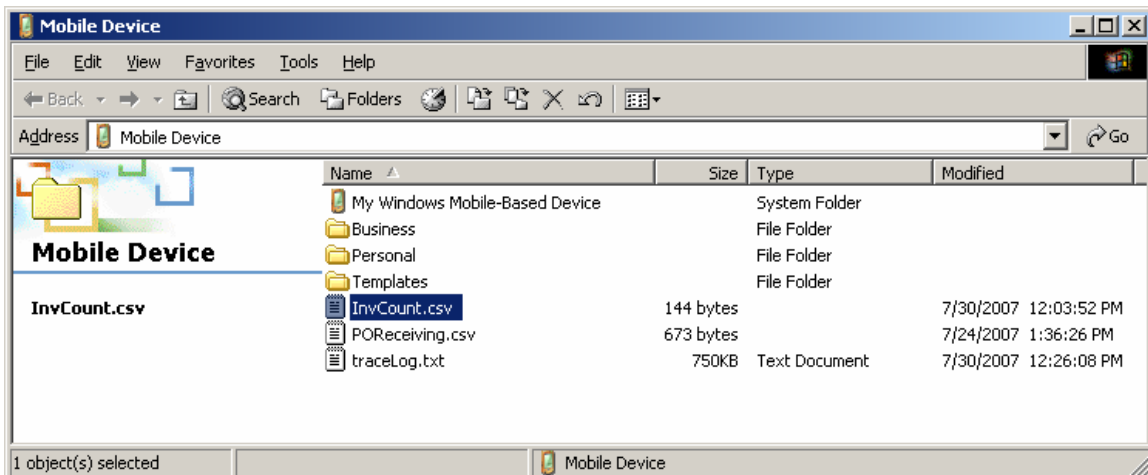
Transferring files from scanner to PC

To transfer your csv files place your scanner in its cradle. Then connect your scanner’s cradle using a USB cable to a computer that has active sync installed. Once you connect the scanner active sync should automatically start up. You will see the image below.

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Click the Explore Icon to open explorer on your scanner. The following window will appear and you can see the csv files on the scanner's o/s.



At this time you can click and drag the InvCount.csv or POReceiving.csv file to your local machine or network and perform the Elliott Physical count Import or PO Receiving Import procedures. (Refer to Elliott documentation for more on these Import Procedures.)