



Analyst Version 3.46

The Falcon

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An extract from the full Analyst manual containing:

The Falcon

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The Falcon

Introduction to the Falcon

The Falcon is a hand held terminal which can be used to count stock, build orders or receive goods into the store. This guide will enable you to use the Falcon to its full potential.

If you are hiring the Falcon for a week or two it will arrive in a sturdy carry case with a combination lock on it. Each case is assigned a Falcon set number and is displayed on the label on top of the case. To open the lock you must call the CareDesk to let them know you have received it and to tell them which Falcon set you have received. They will then tell you the combination to open the case.

When opened the package will contain the Falcon, a cradle, a power supply and a cable which will connect the cradle to one of your terminals.

The cradle is used to transfer data from the Falcon to Analyst and also recharges the batteries of the Falcon. It can be connected to any terminal on your Analyst network. It is advisable to connect it to the least used terminal if you can.



Setting Up

Connecting the Cradle

The cradle is supplied with a cable to connect to a terminal. Each end of the cable has two connectors; both a 9 pin and 25 pin and can be used any way round. Identify a spare COM port on the terminal you wish to connect the cradle to and match the connector on one end of the cable that will connect to it.



25 pin connector



9 pin connector

Securely connect the cable into the spare COM port and the 25 pin connector on the other end to the cradle. Plug the mains power adapter into the cradle and spare plug socket.

The red power light will illuminate when the power is connected.

Configuring Analyst

Analyst will need to be configured to be aware that it is using a Falcon. To do this launch Analyst PoS and log-on as Supervisor. Now select **Admin, System Configuration** and click on the **Hardware** tab. You will need to call the CareDesk on 01257 235940 for a password to access this tab.



On the middle right of this window in the "Peripherals" section type in the COM port number you plugged the cradle into the HHT field and select 'Falcon' from the drop-down box next to it. You will notice that support remains for the Hawk and Microhawk should you still have a terminal of that kind. Call the CareDesk if you need specific help with these older terminals.

When complete press **OK** to return to Analyst.

Testing the Falcon

Once the cradle has been connected and configured it should be tested before being used thoroughly. If there is a problem with the communications or the Falcon itself, the reconfiguration might result in the scanned batch of items being lost. This can be quite upsetting if it is a large batch of a real stock take.

Follow the instructions for the Ad-Hoc Stock Counts but only scan three or four items. Remember the items scanned and make a note of what count you have entered into the Falcon for them. Maybe even use silly numbers like 111, 222, 333 and 444 for the stock values of them.

Then follow the Uploading the Count to Analyst section to send the information back to Analyst. The default options will be fine for the test so simply **OK** the options box on Analyst and download from the Falcon by pressing **F4** then **F1** and returning the falcon to the cradle.

The data should now transfer and be immediately updated in Analyst. With a very small batch it can happen as quick as a flash so scan the items on Analyst to check the stock levels in the product editor. They should match the values that were entered into the Falcon.

If they do, everything is configured correctly and the stock take can commence when you are ready. Be sure to return the items to their correct stock level if they are not going to be included in the main count.

If the data is not transferred, check the cradle is connected to both the computer and power and that lights are illuminated on the cradle and that the Falcon was sat in it correctly and ready to communicate. Also check the settings in Analyst and try a different COM port number. If you have exhausted these options call the CareDesk who will be able to help.

Using the Falcon

Falcon Basics

When scanning the code, the Falcon will count 1 item for each scan unless you enter an amount on the numerical keypad after scanning. The product information entered into the Falcon is known as a 'batch'.

The scanner will operate best when held around 10-15cm from the barcode. Ensure that the red beam that is emitted only crosses one barcode at a time. Usually this won't happen unless you are scanning from a PLOF, shelf edge labels or similar.

The keypad buttons are:

- Φ - Power on/off - at the bottom left
- \odot - Backlight on/off
- Fn (yellow) - Function - used to access F6-F10
- F1 - Up one line
- F2 - Page up
- F3 - Manual barcode entry
- F4 - Quit / Escape
- F5 - Down one line
- F6 - Page Down
- F7 - Enter price
- F8 - Function key reminder & line count
- F9 - Not used
- F10 - Not used
- Esc - Quit / Escape
- Scan - Scan the barcode
- Enter (x2) - Confirm, open highlighted item.

Always use the strap when using the Falcon. It can be repositioned to attach to the lug at the bottom left or bottom right depending on which hand you prefer to hold the Falcon with. Whilst it is fairly robust, it can still break if dropped onto a hard surface and, if it is on loan to you, you will be liable for the cost of repair or replacement if broken whilst in your care.

Cradle Indications

There are two lights on the cradle, the **POWER** light indicates whether the cradle is turned on or not. Information from the Falcon cannot pass through the cradle into Analyst unless the cradle is powered.

The **READY** light illuminates when the falcon is placed in the cradle and is red when the battery is being charged and green when the battery is fully charged.

Ad-Hoc Stock Counts

The Falcon is most frequently used to count stock. This 'ad-hoc' method simply indicates that any item can be scanned and counted without any preparation or lists generated by Analyst like in Planned Stock Counts

To count an item, scan the barcode on the product packaging or the barcoded shelf edge label if you use them and enter the amount on the shelf. The initial scan of an item will enter a count of 1, so if there is only one on the shelf a number doesn't need to be entered on the

keypad. Each time the same code is scanned the count increases by 1. Three items can therefore be counted by either scanning an item once and typing '3' into the keypad or by scanning the item 3 times. If an item is scanned more than once though it will beep differently to alert the user to the fact that it is already in the batch.

The barcode and number counted of each of the items scanned are displayed on the screen of the Falcon. The information held in the scanner is called 'the batch'.

The number of lines you have scanned can be displayed by pressing **CT+F1**. If too many items are scanned in one batch the Falcon might freeze up resulting in the loss of the whole batch. Do not exceed 700 items in any Ad-Hoc batch.

Smaller batches provide a more accurate count in any case and result in fewer Stock Count Queries which are items which have been sold or delivered since they were counted on the falcon.

Tips

- Leave the Falcon to charge overnight or at least for a few hours on the cradle before you start your stock count.
- Make a note of any items which are located in more than one place on the shop floor. Depending on some settings you might over-write the count of the first location with the count of the second location. Add them up manually when the first location is counted and make a note to skip them at the second location.
- Scan your store methodically so you can keep track of what you have already scanned.
- Download the Falcon regularly. Every mod, case, unit or aisle. Smaller batches result in more accurate stock counts with fewer queries.
- Have two people count the stock and write the quantity on the shelf edge in wipeable pen in advance of the person with the Falcon who can quickly scan an items and type in the number. This is an ideal method for when the shop is closed for the count. Don't allow too long between the counters and scanner if the shop is open and someone might come and take something off the shelf.

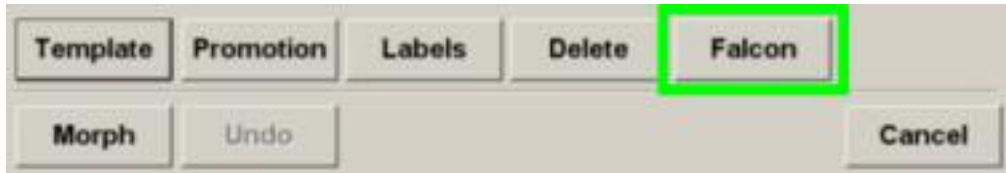
Planned Stock Counts

A planned stock count is a list of products prepared through the reports section of your Analyst system which is sent to the Falcon to be counted, which allows you to target specific areas of your shop. The report can be either a standard report of items in a department, for example, or can be part of the Suggested Stock Count facility from the Planned Stock Counts option found at the top of the reports list.

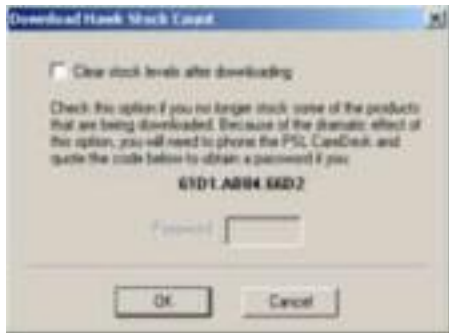
Once you have generated a report with all the items to be counted press CTRL+A on the keyboard to tag them all.



Now press the **Tags** button, then **Falcon**.



An option will appear to clear the stock levels of items being uploaded. This requires a code from the CareDesk for your security.



If you do not clear these levels, any items that are not counted in the batch which is uploaded to the Falcon will not have their stock levels changed. With your choice highlighted press OK. Now a window will appear which reads "Waiting for Falcon"



On the Falcon, from the main menu select option 1: "Planned stock count". Wait for the screen to read "Waiting for Host PC" and place the Falcon on the cradle. The information will be uploaded to the Falcon and when complete, displayed on the screen of the Falcon.

A list of codes is displayed and the amount counted, but description of the item is displayed at the bottom of the screen. Scan each item in the batch and enter the stock level, or scroll through the list and enter the stock level. If you chose to not clear the stock levels after upload, you must enter 0 (zero) for items you have none of.

Uploading the Count to Analyst

When the batch is complete, the information must be transferred to Analyst. Return to the terminal which you attached the cradle to and select **Exchange** at the top of the PoS screen. Select **Upload Falcon Stock Count** from the menu. The Stock Count window now appears.



This screen is split into four parts. The options on the Stock Count section on the right are explained below:

Activate Without Counting will leave the stock levels in the database alone and simply activate the items in the batch. This is used most commonly for new installations of Analyst to activate the lines which are carried in the shop.

The **Splittable Packs** section is only relevant to Analyst PMR users. It defines how you have counted the stock in the dispensary. Analyst stores stock levels in items so counting by whole packs, Analyst will multiply the pack count by the pack size to determine the stock level of items. This will only provide an accurate count for complete packs though. If there are packs which have been split, then they should be counted and entered into the Falcon as items. Select how the batch has been counted. The two types of counting cannot be mixed in the same batch.

In the **Stock Levels** section the **Replace Existing Stock Levels** option will overwrite the stock in each product record you have scanned with the amount you entered into the Falcon. If you scanned the same item more than once, the two amounts you entered are added together.

Add to Existing Stock Levels will add the amount you counted to the stock values you already have against each product record you scanned. This is usually used after the Replace option above to count the stock room after counting the shop floor or vice-versa.

Intelligent Add or Replace. When selected you will need to enter the date and time the whole stock count was started (not just this batch). The system will then assume you are completing a full stock count and if the system determines the stock has not been counted since the time you entered it will replace the stock levels as described above. Or if the stock has been counted since the time you entered, the stock levels you counted will be added to the levels you have already entered into the product record.

The **Existing Stock Levels** section provides a couple of advanced options for full stock counts. Every item in the system can be set to have zero stock and/or be uncounted. This should only be used for the first batch of a full stock count and will result in only those items held in this batch and subsequent batches to display a stock level and a counted icon. By using these

options you will be committing to perform a full stock count of the shop before Analyst can reliably reorder items for you again. Because these options affect the whole system and can have serious consequences for order produced by Analyst a password is required from the CareDesk to use these options.



When this screen is complete, press **OK**. The screen will display a "Waiting for Falcon" window (after entering the password if any of the bottom options were selected). On the Falcon press **F4** to quit the batch. The Falcon will ask if you want to download the information. Press **F1** for 'yes' and place the Falcon back on the cradle.

Stock Count Queries

The count is immediately processed and applied to all product records counted. If any queries have arisen with the count a message is displayed to view a report. Press **OK** then select the **Reports** section of Analyst. A new report has been created under the heading "Stock Count Queries". Select the one just created and press **Run**. The batch that has been downloaded is displayed in the order they were scanned.

The queries may be an unknown product, shown by just the barcode in the description column. To remedy this, highlight the line and press **Search** and find the product by description. Create the product if you cannot find it. When complete, the barcode you scanned is automatically assigned to the product selected or created.

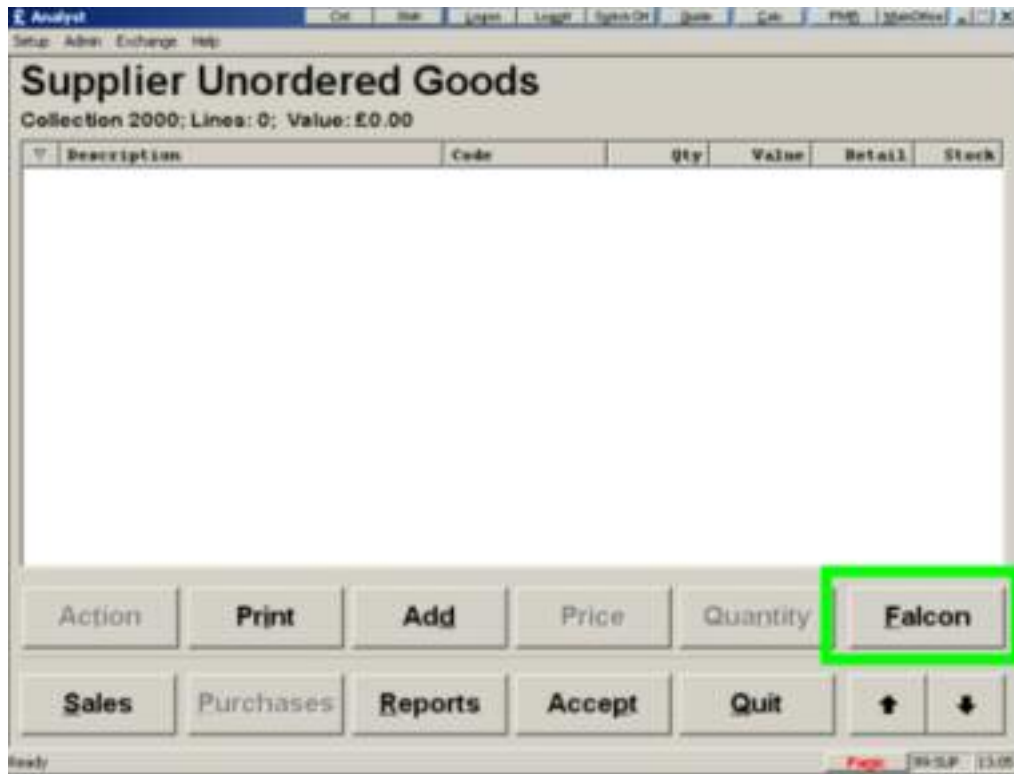
If a blue question mark appears next to any line in the report, the system is querying the amount you counted. This is because the item was sold or delivered between it being counted and downloaded.

	This item is not recognised by Analyst. Search for it by description to find a match or create it.
	This items has been delivered or sold since it was counted on the Falcon. Recheck the stock level.

Unordered Goods In

If you receive goods that were not ordered through Analyst, you will need to enter the stock received which can be done with the Falcon. Scan the barcode of an item that has arrived and enter how many have been delivered on the keypad. Do not scan the barcode found on the outers/cases of items you have received as they will not work.

When you have entered the delivery, return to the terminal where you have connected the cradle and from the Analyst PoS Purchases screen select **Unordered Goods Received** and press **Expand**. Select the supplier you have received the goods from and press **OK**. Now press the **Falcon** button and the screen will now display a "Waiting for Falcon" dialogue.



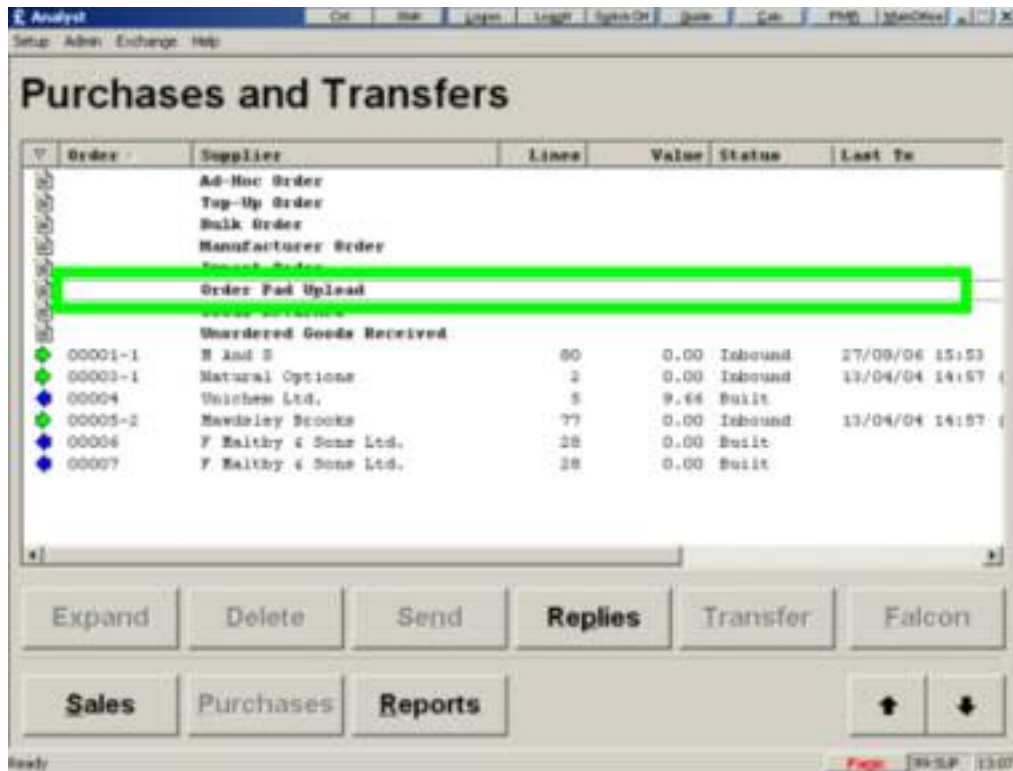
On the Falcon press **F4** to quit the batch. The Falcon will ask if you wish to download the information. Press **F1** for 'yes' and place the Falcon back on the cradle.

A list of the goods is displayed in the order you scanned them. The quantities should be reviewed before pressing the Accept button to put the items in stock.

Building an Order

To build an Ad-Hoc order with the Falcon, scan the barcode of the item you wish to order, the shelf edge label or the code in the PLOF and type in the number of units you wish to order. Do not scan the barcode found on the case the items came in.

When you have built your order, return to the terminal where you have connected the Falcon and from the Analyst PoS Purchases screen select **Order Pad Upload** and press **Expand**. Select the supplier you wish to send the order to and press **OK**. The screen will now display a "Waiting for Falcon" dialogue.



On the Falcon press **F4** to quit the batch. The Falcon will ask if you wish to download the information. Press **F1** for 'yes' and place the Falcon back on the cradle

A new "Built" order with a blue arrow next to the name of the supplier you selected appears on the purchases screen. This should be reviewed before being sent in case of any input errors. This will be listed in alphabetical order, not the order in which they were scanned in.

Price Validation

This feature is only available in Falcon software version 4.0 and provides to the option to activate product lines and enter the current retail price. This also sets the Retail Price Source to 'User maintained' so they will not change back with the next database update. Once scanned, batches can be reviewed

Option 6 from the main Falcon menu opens this facility.

Scan each item and enter the current retail price in pence. If no price is available press F4 to cancel the price entry screen

Keep the batches small and manageable by downloading the Falcon regularly.

Downloading Price Batches

Once a reasonable batch has been scanned it will need to be downloaded into Analyst. On the Falcon press F4 and confirm you would like to download the batch with F1. Return the Falcon to the cradle. In Analyst, on the terminal the falcon is connected to, click **Exchange** at the top of the screen and select **'Upload Falcon Price Validation...'**. The information will then be downloaded and processed by Analyst.

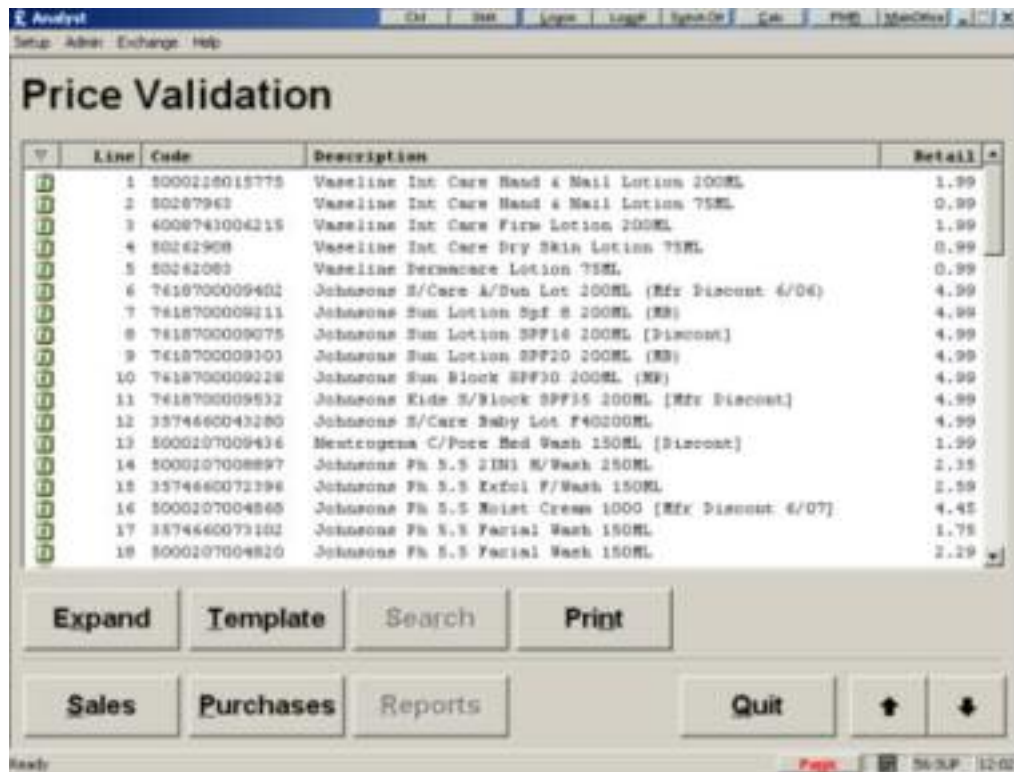
The price of scanned items are changed instantly in Analyst and the Retail Price Source is set to User Maintained to ensure they don't change back with the next database update.

A message will appear when the processing is complete that a report has been created.

Reviewing Batches

Once a batch has been downloaded it is available for review in the reports section of Analyst. Click on the **Reports** button and scroll down the list to 'Falcon Price Validation' section. Each of the downloaded batches are listed and are named by the date and time of the download.

Click **Run** to open a batch and review the products scanned and priced entered. These are displayed in the order in which they were scanned and lists the line number, barcode, description and the price which was entered.



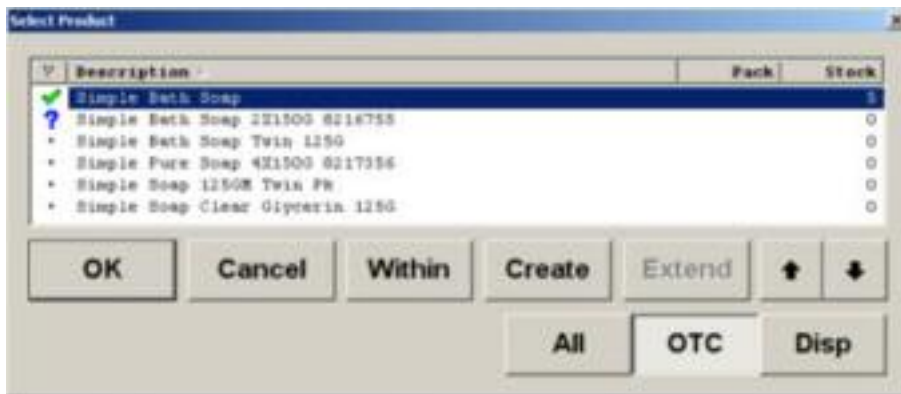
Any of the items can be expanded into the product editor or items can be multi-selected and have the product template applied to them.

Unrecognised Products

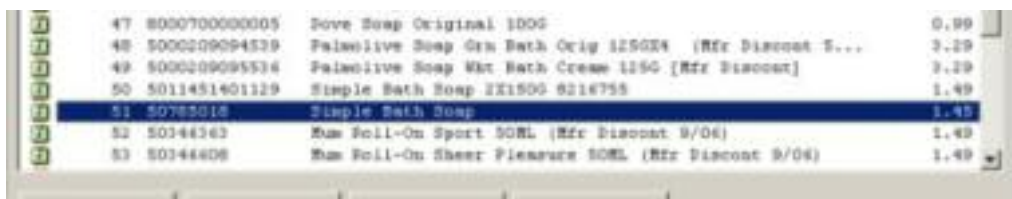
Scan through each downloaded batch to see if there are any lines which have not been recognised by Analyst. These are highlighted with double exclamation marks and will not have a description.



Use the price which was entered and the surrounding products to identify the product on the shelf. Use the search button to find the product in Analyst.



Select the item in the search list and click **OK**.



The item is now displayed and the new price has been applied.

Close the report by clicking the **Quit** button. All of the changes which have been made will be saved.

Pricing Without Activating

By default in the system configuration, each of the scanned lines will be activated when using the Price Validation option. Even if no price was entered the product will still be activated with the price and price source unchanged.

This option can be turned off in the system configuration though so all scanned items which are inactive remain so.

Manipulating Batches

By default only batches that contain stock queries are displayed on the system but the system configuration provides the option to retain all downloaded stock batches.

When turned on, each time the Falcon is downloaded the full batch will be displayed and retained in the 'Falcon Stock Counts' section of the reports.

Price validation batches are retained in full automatically and are displayed in the 'Falcon Price Validation' section of the reports.

These batches can be opened and viewed by highlighting the batch and clicking **Run**.

When viewing the products in the batch any lines can be opened in the product editor or the product template can be applied to a range or selected products.

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