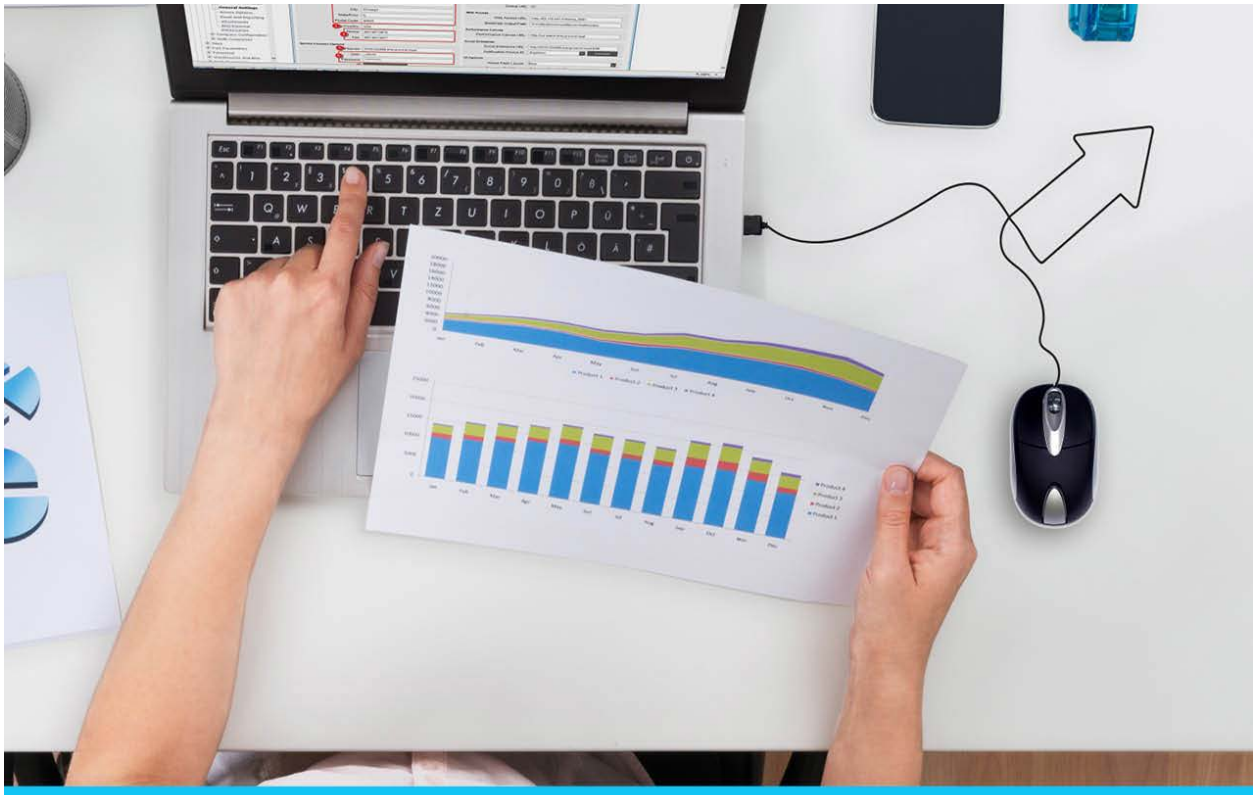

Eclipse RF Cycle Counting

Release 9.0.5

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RF Warehouse Management Overview

Use the Eclipse Radio Frequency (RF) Warehouse Management companion product to control and automate your entire warehouse's functions in real-time.

The RF Warehouse Management system uses radio frequency data communications that provide real-time access and integration to the system. RF data communications transmit between RF guns and workstation terminals, allowing up-to-the-minute information transmission of the following:

- Receiving and Put Away
- Picking
- Staging and Closing Orders
- Inventory Replenishment
- Product Movement
- Physical Inventory
- Cycle Counting

By using the RF Warehouse Management system, your warehouse gains real-time control over inventory. This real-time data transmission gives warehouse management the ability to:

- Make timely, well-informed decisions.
- Increase sales while lowering inventory levels.
- Reduce inventory variances to less than 0.01%.
- Reduce the number of lost sales and returns.
- Decrease your distribution cycle time.
- Improve service levels.
- Eliminate facility shutdown during physical inventory.
- Minimize personnel requirements and reduce your payroll.
- Improve warehouse space management.
- Cycle count discrepancies immediately.

RF Cycle Counting Overview

Make cycle counting a daily priority to keep your inventory accurate.

Initiating Cycle Counts

RF cycle counting works from Warehouse Operation Queuing. Warehouse Operation Queuing identifies products and locations that need to be counted by searching the entire product file for the following:

- Product on-hand quantities of less than zero.
- Product in a location that is not within the parameters defined in Zone Maintenance.

Products that have a blank location and quantity of more than zero are listed on an automatically run Blank Location Report that users can use to adjust locations, as needed, in Location Maintenance.

The queue then sends these items to the RF system. Warehouse operators can check their RF guns for the items that need to be counted.

You can also trigger the queue to run an immediate cycle count when the following occurs:

- Quantity in RF Location Maintenance seems incorrect. Queuing the product for a cycle count by using the **Cycle Count** hot key triggers the immediate cycle count.
- During a rank cycle count, a variance between the quantity of product in the system and the physical quantity at the location occurs. The system queues an immediate cycle count for the location. A user with minimum authorization must perform the immediate cycle count. A user with a higher authorization can perform the immediate cycle count at a later time or skip the immediate cycle count.
- During picking, a location's quantity becomes negative in the system. If the control maintenance record is set to **Y**, the system queues an immediate cycle count for the location.

Cycle Counting Process

Once you begin cycle counting, the RF system leads you through the process. With each count, you must scan the location and product and then enter the quantity in its unit of measure. If variances occur between the product quantity in the system and the product quantity at the location, depending on control parameters, your authorization level, and whether the product resides in additional locations, the system does one of the following:

- Automatically updates the adjustment.
- Instructs you to count other locations containing the product.
- Queues an immediate cycle count for the deviant location and uncounted related locations.
- Queues an immediate cycle count for uncounted related location and adjusts the quantity in the deviant location.

To handle a quantity variance, use the Enter Related Counts screen. On this screen, the system leads you through a count at each location - as defined in the control maintenance record - holding the product with the variance until you have either found the variance quantity or you have counted all locations.

You must be authorized to skip related counts and to make manual adjustments. You must also adjust locations based upon their ranks defined in the control maintenance record.

Authorization

Several levels of authorization must be assigned before using RF cycle counting:

Authorization Key	Authorization Level	Supported Functions
PRD.LOCATION.MAINT	2	User can access RF cycle counting from the Count by Location screen. Adjustments can be made only if the control maintenance record is set to **Force Count on All**. If this setting is activated, the user must count all locations for this item. • If the quantity discrepancy is not resolved, the system forces an immediate cycle count for an authorized user. • If the quantity discrepancy is resolved, the system updates the quantity in each location, as needed. **Note:** If you do not want the user to handle variances at all, do not assign either of the below authorization keys and set the control maintenance record to **Queue Remaining**. This way, the user will only scan the location, enter a quantity, and continue on to the next location. A user with a higher authorization can then handle any variances.
	3	User can use RF cycle counting and make adjustment of product quantity.
RF.COUNT.ABORT	0	For ranked counts, user must complete related counts to find the variance.
	1	For ranked counts, user can select to: • Complete related counts to find the variance. • Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.
	2	For ranked counts, user can select to: • Complete related counts to find the variance. • Queue the variance for an immediate cycle count, which the same user or another user can count at a later time. • Adjust current location and ignore related location counts. • Make manual product quantity adjustments in RF Location Maintenance.
RF.COUNT.ABORT.IM	0	For immediate counts, user must complete related counts to find the variance.
	1	For immediate counts, user can select to: • Complete related counts to find the variance. • Queue the variance for an immediate cycle count, which the same user or another user can count at a later time.

Authorization Key	Authorization Level	Supported Functions
	2	For immediate counts, user can select to: • Complete related counts to find the variance. • Queue the variance for an immediate cycle count, which the same user or another user can count at a later time. • Adjust current location and ignore related location counts.

If you are not assigned either the RF.COUNT.ABORT or RF.COUNT.ABORT.IM authorization keys, the control maintenance record determines if you must complete all related counts to find the variance (**N**, which is equal to authorization level 0) or can skip related counts (**Y**, which is equal to authorization level 2).

Automated RF Cycle Count Task Selection

In RF cycle counting, Warehouse Operation Queuing selects items based on phantom scheduling to be counted the following day. Three control maintenance records are involved in setting up Warehouse Operation Queuing to work with RF cycle counting:

Control Maintenance Records	Function
RF Cycle Count Max Entries	Total amount of products/locations to place in the queue daily. Negative quantities and invalid locations are sent to the queue no matter what the maximum entry is, meaning that the queue could hold more entries than the maximum number on a daily basis.
RF Cycle Count Min Cycle Repeat Days	The number of days in between cycle counting for A ranked items. The system uses this base number to calculate number of days for subsequently ranked items. For more information, see below.
RF Cycle Count Use Rank Number	The rank identifier assigned to each branch. **Note:** Assign ranks to products in Product Rank Maintenance.

The RF system selects items based on the parameters defined by these control maintenance records. Every time Warehouse Operation Queuing runs, the RF system searches the entire product file, regardless of any ranks. It builds a list of all products and locations with a negative on-hand quantity, as well as product with invalid locations.

The queue then loops through the entire product file again to check each product's rank and cycle count repeat days versus last cycle count date. It uses the following equation to run these checks:

If Last Cycle Count Date < (Today's Date - Ranked Item Cycle Count Days), then generate cycle count in-process record. Where Ranked Item Cycle Count Days = value defined in the RF Cycle Count Min Cycle Repeat Days control maintenance record for the branch x the following values:

- A ranked items = base number
- B ranked items = base number x 1.5
- C ranked items = base number x 2
- D ranked items = base number x 2.5
- E ranked items = base number x 3
- F ranked items = base number x 3.5

For example, the system would calculate the Ranked Item Cycle Count Days as follows if the base value defined in the RF Cycle Count Min Cycle Repeat Days control maintenance record is 30 days:

- A ranked items = 30
- B ranked items = 45
- C ranked items = 60
- D ranked items = 75
- E ranked items = 90
- F ranked items = 105

Using the above Ranked Item Cycle Count Days values, the system would add the following items to the queue if the Last Cycle Count Date = 01/05/05, Today's Date = 03/05/05:

- If 01/05/05 < 03/05/05 - 30, then add A ranked items with the 01/01/05 last count date to queue:

  03/05/05 - 30 days = 02/03/05, and 01/05/05 < 02/03/05; therefore, add A ranked items with the 01/01/05 last count date to queue.

- If 01/05/05 < 03/05/05 - 45, then add B ranked items with the 01/01/05 last count date to queue:

03/05/05 - 45 days = 01/19/05, and 01/05/05 < 01/19/05; therefore, add B ranked items with the 01/01/05 last count date to queue.

- If 01/05/05 < 03/05/05 - 60, then add C ranked items with the 01/01/05 last count date to queue:

  03/05/05 - 60 days = 01/04/05, and 01/05/05 > 01/04/05; therefore, do not add C-F ranked items with the 01/01/05 last count date to queue.

This method of selection allows for a mix of products to be queued for cycle counts. The products to cycle count are listed in sequence with the layout defined in Zone Maintenance. With such a mix, you can cycle through your entire inventory.

Note: Remember that immediate cycle counts are added to the queue on top of these products. You should always count immediate cycle count items first. We recommend that you check for immediate cycle count items on an hourly basis.

Selecting RF Cycle Count Types

In the RF Warehouse Management system, you can select the type of cycle count you want to perform. This feature facilitates immediate cycle counting for items with discrepancies. Every hour, access the Check Counts screen to see if new immediate cycle count items have been queued. If so, cycle count these items to keep inventory accurate.

After you have counted immediate cycle count items, you can select to count all items or ranked items listed for the day.

To select a cycle count type to check:

1. From the **Warehouse Management > RF Applications > RF Main Menu**, select **Cycle Count** to display the Check Counts screen.

   Note: If prompted, log on to the character-based system.

2. In the **Br** field, edit the branch you are cycle counting, if necessary.
3. In the **PID** field, verify that your Picker ID is displayed and press **Enter**.
4. Use the **Type** hot key and choose one of the following:

Type	Description
All Cnts	Includes all product for which to verify inventory quantity. The screen displays this list as its default.
Immediate Cts	Products with quantity discrepancies: • Products backordered during the picking process. • Products which created a negative location during picking. • Product queued in RF Location Maintenance.
Ranked Items	Items that have been assigned a cycle count rank. This rank determines how often each year the items are counted.

5. Cycle count the displayed items.

Performing RF System-Directed Cycle Counting

From the Check Counts screen, perform system-directed cycle counting. You can then choose the order in which you want to count items, but you should always count immediate cycle count items first because they are the items with identified discrepancies. After you cycle count the immediate cycle count items, select to count all items or ranked items. If you select to count all items, the system displays each item individually on the screen, listed in sequence with the layout defined in Zone Maintenance. You should count all items in the queue each day, so it is not necessary to select ranked items unless you want to.

To perform a cycle count, go to the product to be counted, scan the item and location, and enter the quantity at the location. The RF system leads you through the steps you must take to complete the cycle counting process.

You must be assigned level 3 of the PRD.LOCATION.MAINT authorization key to make adjustments in RF cycle counting and RF Location Maintenance.

> **Note:** If the control maintenance record is set to **No**, you cannot decrease consigned inventory using RF cycle counting. You cannot ever increase consigned inventory using RF cycle counting. Use Product Location Maintenance to adjust consigned inventory when you cannot do so using RF cycle counting.

To perform system-directed cycle counting:

1. From the **Warehouse Management > RF Applications > RF Main Menu**, select **Cycle Count** to display the Check Counts screen.

   Note: If prompted, log on to the character-based system.

2. In the **Br** field, edit the branch you are cycle counting, if necessary.
3. In the **PID** field, verify that your user ID is displayed and press **Enter**.

   The system displays the first item to check in the **Desc** field, along with product information in the following fields:

Field	Description
All Cnts/Immediate Cnts/ Rank Cnts	The quantity of items in that cycle count group to check.
T	The product's status, such as **S** for stock. **Note:** Locations which contain stock, tagged, and consignment inventory display as **S** only.
Location	The location that needs to be checked.
Stat	The product's location status, such as **P** for primary.

4. Go to the item's location defined in the **Location** field.

   Use the **Skip To** hot key to skip forward to a different entry or location. At the prompt, enter one of the following.

   - **E** - Skips forward to the line item that you enter.

     For example:

The **All Cnts** field displays **0300**, which indicates that there are 300 line items to check. Enter **0150** to skip to line item 150 and start your cycle count half way down the queue.

- **L** - Skips forward to a different location that you enter.

Note: Use this hot key when multiple operators are cycle counting.

5. Scan the product.
6. Scan the location and lot, if necessary.
7. Physically count the number of items at the location and enter that number in the **Qty** field.

   One of the following occurs:

   - The quantity that you count and enter matches the current quantity. The system updates the cycle count date for that location. Continue on to the next item.
   - The quantity that you count and enter does not match the system's quantity for the item. The system displays "Are you sure count is #? (Y/N)." Enter **Y** if the count is correct. Either complete related counts to find the variance or, if you are authorized, select another option from the list that displays.
   - Depending on your authorization level, the system forces you to count the remaining locations for that product before continuing to the next item. The RF Cycle Count Dollar Cutoff control maintenance record must also be activated and the quantity you enter must be outside of the defined dollar cutoff range. If the dollar amount is within the cutoff range, then the system makes the adjustment and you can continue cycle counting as usual.
8. Press **Esc** to continue to the next item to count.
9. Repeat this process for all items queued to be cycle counted.
10. After cycle counting, press **Esc** to save updates and exit the screen.

    Note: From the **Whse Mgt > Reports** menu, access the Adjustment Variance Report to view completed RF cycle counts.

Performing RF User-Directed Cycle Counting

Use the Count by Location screen to manually initiate a cycle count rather than using the system-initiated rank.

To make adjustments in RF cycle counting and RF Location Maintenance, you must be assigned either:

- Level 2 of the PRD.LOCATION.MAINT authorization key with the control maintenance record set to **Force Count on All**.
- Level 3 of the PRD.LOCATION.MAINT authorization key.

  Note: If the control maintenance record is set to **No**, you cannot decrease consigned inventory using RF cycle counting. You cannot ever increase consigned inventory using RF cycle counting. Use Product Location Maintenance to adjust consigned inventory when you cannot do so using RF cycle counting.

To perform user-directed cycle counting:

1. From the **Warehouse Management > RF Applications > RF Main Menu**, select **Cycle Cnt by Loc** to display the Count by Locations screen.

   Note: If prompted, log on to the character-based system.

2. In the **Br** field, enter the branch for the location that you are cycle counting, if needed.
3. Scan the location at which you are starting your counts.

   All product held in that location displays.

   Note: If you find a product that is not displayed in the list but is at the current location, scan the product's barcode to add the product to the location and to count it.

4. Select the first product to count in the location either by scanning the product or by placing the cursor on the line item and pressing **Enter**.

   Note: Use the **Page Up**, **Page Down**, or **Arrow** keys to scroll through each product listed for the location. Use **Shift-Home** to select the first line item and **Shift-End** to select the last line item. The selected line item out of the total number of line items displays at the bottom of the screen.

   The Check Counts screen displays.

5. Follow steps 5-7 in the Performing RF System-Directed Cycle Counting topic.

   After counting the selected product, the system returns you to the Count by Locations screen with the product you just counted removed from the displayed list.

6. Repeat this process for all product in the location.

   If product still displays in the list after counting all product in the location, do the following:

   - Select the product to display the Check Counts screen.
   - Enter **0** for the product quantity in this location.
   - Handle the variance, as appropriate.

Note: From the **Warehouse Management > Reports** menu, access the Adjustment Variance Report to view completed RF cycle counts. If prompted, log on to the character-based system.

7. Press **Esc** to save updates and exit the screen.

More Options for Cycle Counting by Location

The Count by Locations screen also offers these options.

Hot Key	Function
Qty	Displays the on-hand quantity of the displayed product. Toggles between views.
Count	Displays the Check Counts screen to perform a cycle count.
Prd ID	Displays the product identification number for the displayed product. Toggles between views.

Resolving Cycle Count Quantity Variances in RF

When a count variance occurs during a cycle count, depending on your authorization level, you must either find the count discrepancy, queue the discrepancy for an immediate cycle count, or adjust the product quantity. For an immediate or user-directed cycle count, you can ignore the discrepancy and move on if you have the authorization.

Note: If the control maintenance record is set to **No**, you cannot decrease consigned inventory using RF cycle counting. You cannot ever increase consigned inventory using RF cycle counting. Use Product Location Maintenance to adjust consigned inventory when you cannot do so using RF cycle counting.

You can assign levels 0 to 2 of the RF.COUNT.ABORT and RF.COUNT.ABORT.IM authorization keys to users. The following options are available for users to resolve count discrepancies.

- Level 0 users can only use option 1.
- Level 1 users can use options 1 and 2.
- Level 2 users can use all options.

Option	Result
1. Enter Related Counts	Displays the Enter Related Counts screen with all locations for the product with a quantity discrepancy. Use this screen to find quantity discrepancies.
2. Queue Related Counts	Queues all other locations holding the product for an immediate cycle count. The system sequences this count discrepancy in the queue so that you do not have to immediately go to these locations. Instead you can count these items when their location is the next on your RF gun or another user with authorization can count the items.
3. Skip Related Counts	The system makes the adjustment at this location and skips all related counts.
4. Location Maintenance	Displays the RF Location Maintenance screen where you can manually adjust the quantity for the location. You must have level 3 authorization of the PRD.LOCATION.MAINT authorization key to make such adjustments.

Note: When you select options 1 or 2 above, the system displays only those locations defined in the control maintenance record. If a location has more than one location type and at least one of its types is included in the control maintenance record, then the user's count is for all location types in the location.

Using the Enter Related Counts Screen

If you need to count all locations for the product to find the discrepancy, use the Enter Related Counts screen.

If you are not a level 2 authorized user, you cannot exit the Enter Related Counts screen until the variance has been accounted for or until all related locations have been counted.

You can also use the Enter Related Counts screen to create new locations for a product in order to resolve the variance.

For example, you are missing two widgets from their primary location. You notice two widgets at the location next to the primary location. This location is not in the system as a location for the widgets. On the Enter Related Counts screen, enter the location with the two widgets, and then enter the quantity two for this location. The variance resolves and you can exit the Enter Related Counts screen.

To resolve a count variance on the Enter Related Counts screen:

1. From the **Warehouse Management > RF Applications > RF Main Menu**, select **Cycle Count** to display the Check Counts screen.

   Note: If prompted, log on to the character-based system.

2. Perform the count with the quantity variance.

   - If the system prompts you to verify that the entered count is correct, enter **Y** if your count is accurate.
   - If you are prompted with a selection list, select **Enter Related Count**.

   The Enter Related Counts screen displays.

   Note: The system automatically displays the Enter Related Counts screen for users without level 2 authorization.

   The screen displays the following information:

Field	Description
Br	The branch in which you are counting.
PID	Your user ID.
Desc	The product ID for the product with the quantity discrepancy.
T	The location type, such as **T** for tagged. **Note:** Locations which contain stock, tagged, and consignment inventory display as **S** only. If such a location is adjusted, the system allocates product first to tagged items, next to consigned items, and last to stock items.
Location	The locations, which are defined in the control maintenance record, holding the product. For lot items, each lot within one location is listed as a separate location. Locations holding product with multiple location statuses are listed as one location.
Qty	The quantity for the location that you enter. See below.
Stat	The location status for the product, such as **P** for primary. If an asterisk (*) displays in this column, the location is a multiple status location, such as stock and overstock.
Lot	If the product is a lot product, the lot ID.
UOM	The unit of measure for the product at the location.

3. Scan any location in the **Location** field or scan any unlisted location that you know holds the product. The system displays the Desc screen.

4. At the prompt, scan the product.
5. If the product is a lot item, at the prompt scan the lot.
6. At the prompt, enter the quantity in its unit of measure for the location. The system enters this quantity in the **Qty** field on the Enter Related Counts screen.
7. Scan the next location, and repeat steps 4 to 6 until you have found the variance or you have counted all the locations.
   - If the control maintenance record is set to **Y** and you have found the location with the variance, the system prompts to stop counting. Enter **Y** to stop counting and return to the original cycle count. The system adjusts the product quantities.
   - If you do not resolve the variance after counting all listed locations, the system returns you to the next count in the queue and makes the adjustment for the identified discrepancies.
8. Press **Esc** to save updates and exit the screen.

Performing Physical Cycle Counts in RF

You can use the RF Warehouse Management system to perform a full physical inventory when you are first setting up your warehouse for RF Warehouse Management, or at other times when you want to perform a full physical inventory.

Use the RF Count Entry screen along with the Eclipse Generate Count Control File screen to run a physical cycle count in the RF system.

The RF Count Entry screen does not work with Warehouse Operation Queuing as do the other RF Cycle Count screens. Instead, a count must manually be generated on the Eclipse Generate Count Control File screen and then called on the RF Count Entry screen.

Note: You cannot use the RF Count Entry screen to scan non-dynamic kits. If you scan a non-dynamic kit, the system prompts you that you scanned an invalid kit and makes you re-scan each individual component of the non-dynamic kit. You can scan dynamic kits.

Note: The system captures the user ID of each user performing the physical count. View this information on the Product Activity Log Viewing screen.

To perform a physical cycle count in the RF system:

1. From the **Physical** menu, select **Generate Control File** to display the Generate Control File screen.

   Note: If prompted, log on to the character-based system.

2. Generate a manual count on the Generate Count Control File screen.
3. From the **Warehouse Management > RF Applications > RF Main Menu > Misc** menu, select **Phys Cycle Count** to display the Count Entry screen.
4. In the **Cnt ID#** field, enter the count ID that the system assigned on the Generate Count Control File screen.

   You can also press **F10** and select from a list of recently generated cycle counts.
5. Scan the product you are counting. The system enters the product ID and description in the **Desc** field.
6. Scan the location at which you are counting the product.
   - The system enters the location in the **Location** field.
   - If the product and location you are counting are part of the generated manual count, the assigned control number displays in the lower left corner of the screen.
   - If the product and location you are counting are not part of the generated manual count, "Ctrl # New" displays in the lower left corner of the screen.

   Note: If you need to change the location type from **S** (stock), in the **T** field, press **F10** and select the location type.
7. In the **Qty** field, enter the number of items you counted.

If the quantity you enter is greater than the quantity set in the control maintenance record, then the system prompts you to confirm the number.

- Enter **Y** if this number is correct.
- Enter **N** if this number is incorrect and re-enter the number you counted.

Note: If you are recounting a location, make sure to enter the entire quantity for the new count in the **Qty** field.

The system clears the screen and verifies or updates the inventory for the product, as necessary.

8. If prompted, scan the lot number for the product.
9. Press **Esc** to save updates and exit the screen.

   Note: Use the **Inq** hot key, as necessary to display the RF Inqs screen.

Advanced Cycle Counting in RF Warehousing

A standard cycle count verifies that the on-hand quantities for selected inventory items are accurate at a specific branch in your company. Unlike a full physical inventory, a cycle count involves a *selection* of products at a branch. Companies can cycle count inventory on a daily basis because it requires less effort and involves fewer products.

Advanced Cycle Counting verifies that on-hand quantities for selected inventory items are accurate over the course of a specified time, usually a year, within a specific branch or territory. Use the advanced cycle counting tools to define branches or territories, counting time frames, and which products to count by rank at the specified branch. Your selections create a regular schedule by which warehouse personnel must count the indicated inventory. The system provides at-a-glance progress and analysis data throughout the annual counting process so you can track products more accurately.

> **Note:** You can use advanced cycle counting for manual warehouses or RF warehouses. If you have an standard warehouse, see Advanced Cycle Counting Overview in the Solar Warehouse online help documentation.

RF Versus Non-RF Branches Setup

Before setting your counts, do the following depending on your warehouse setup:

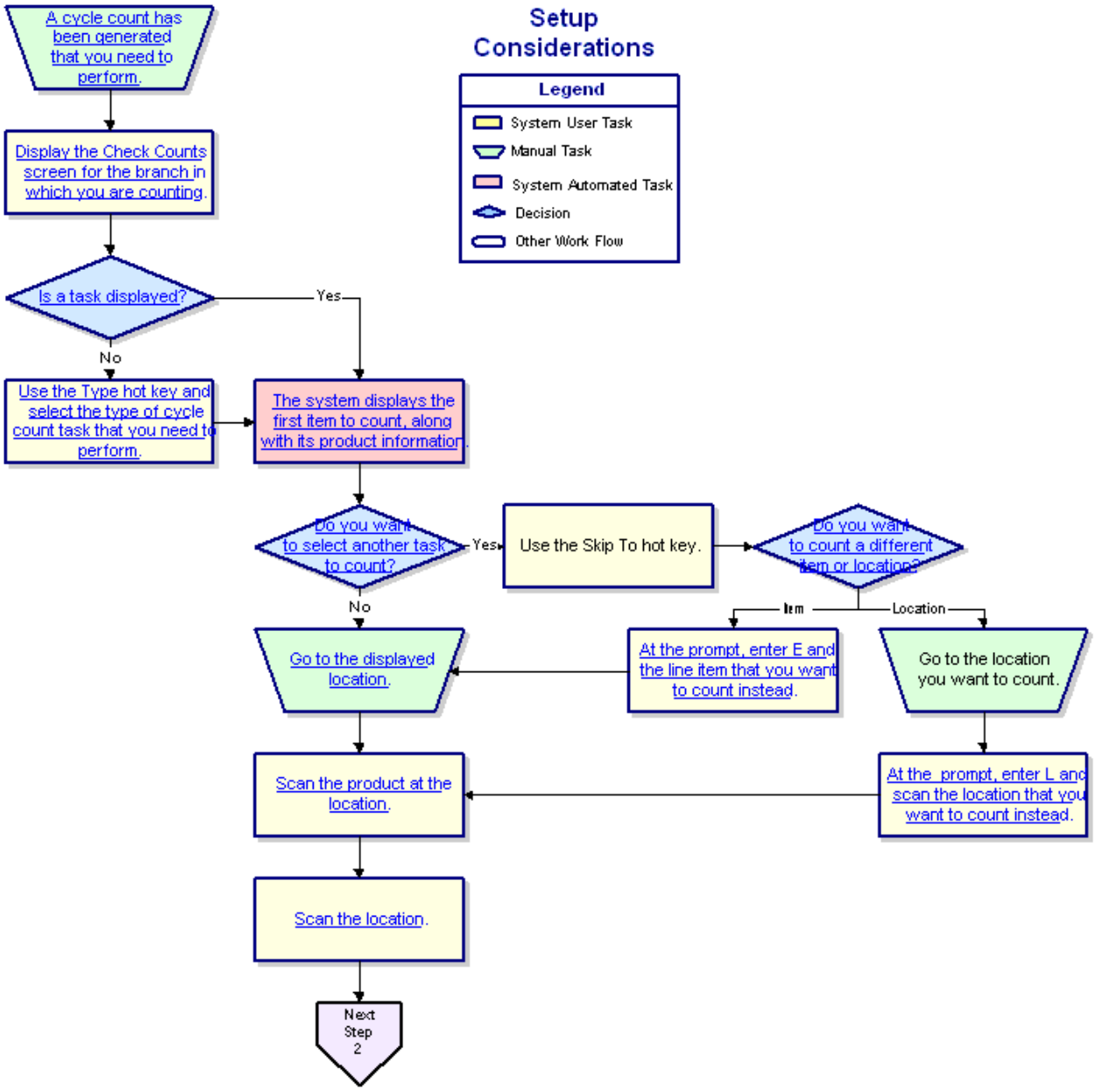
- For an RF branch count, set the **RF Cycle Count Max Entries** to zero (0) to disable that feature.
- For a non-RF branch count, cancel any phantom processes for Random Cycle Count Generation.

Set up Advanced Cycle Counting and analyze the results using Solar Eclipse.

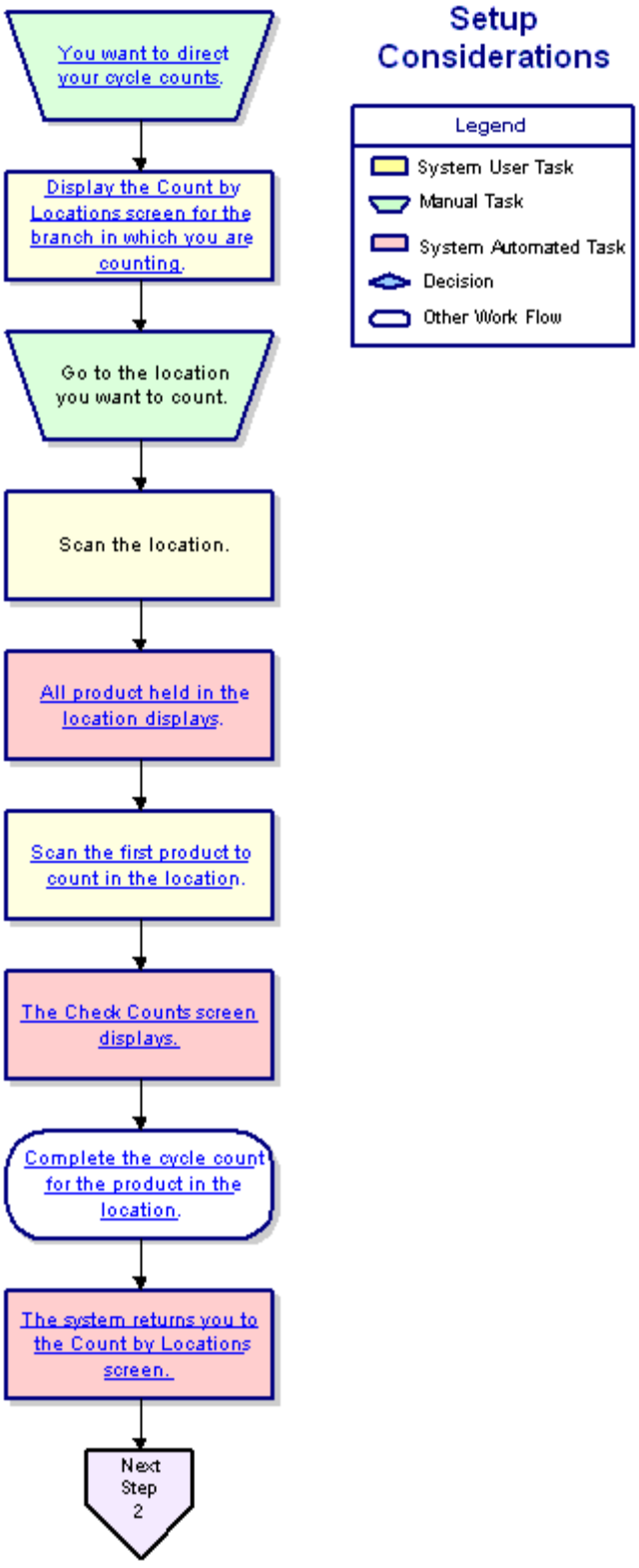
Review the following for more information:

- Setting Up Advanced Cycle Counting
- Additional Advanced Cycle Counting Options
- Adding Supplemental Counts
- Analyzing Cycle Count Progress

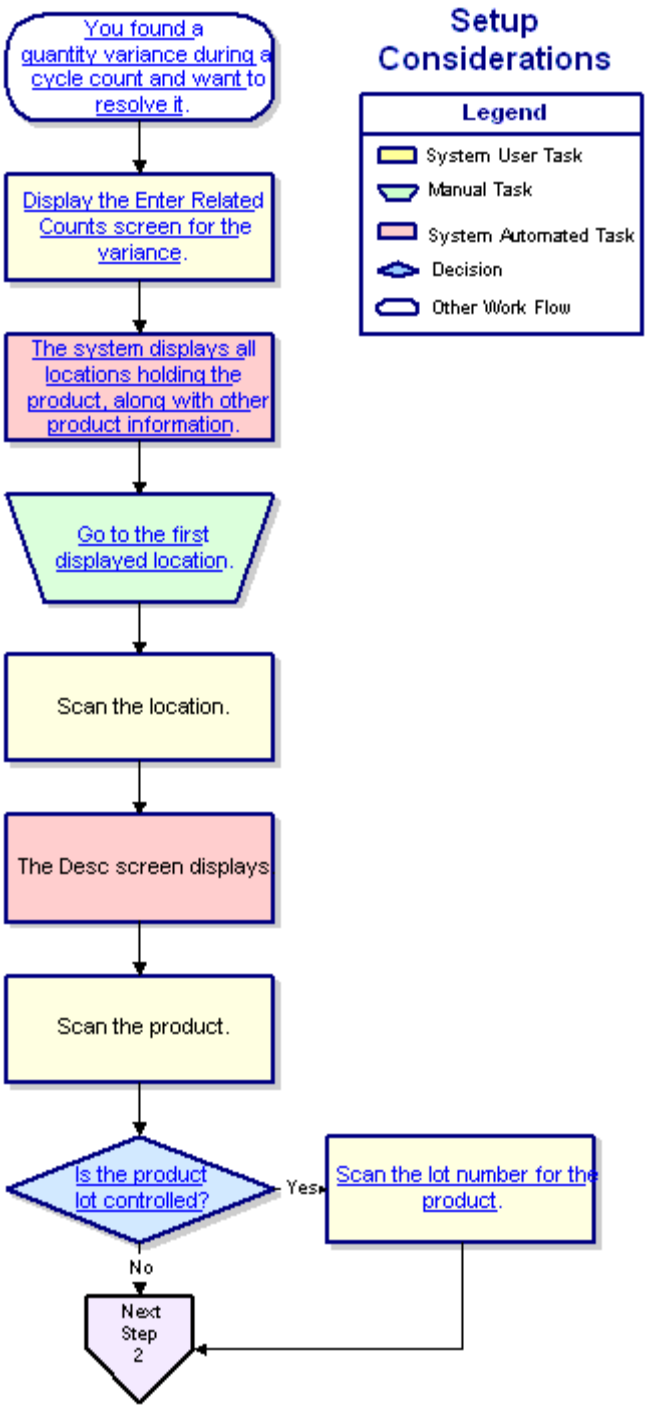
Performing RF System-Directed Cycle Counting Workflow



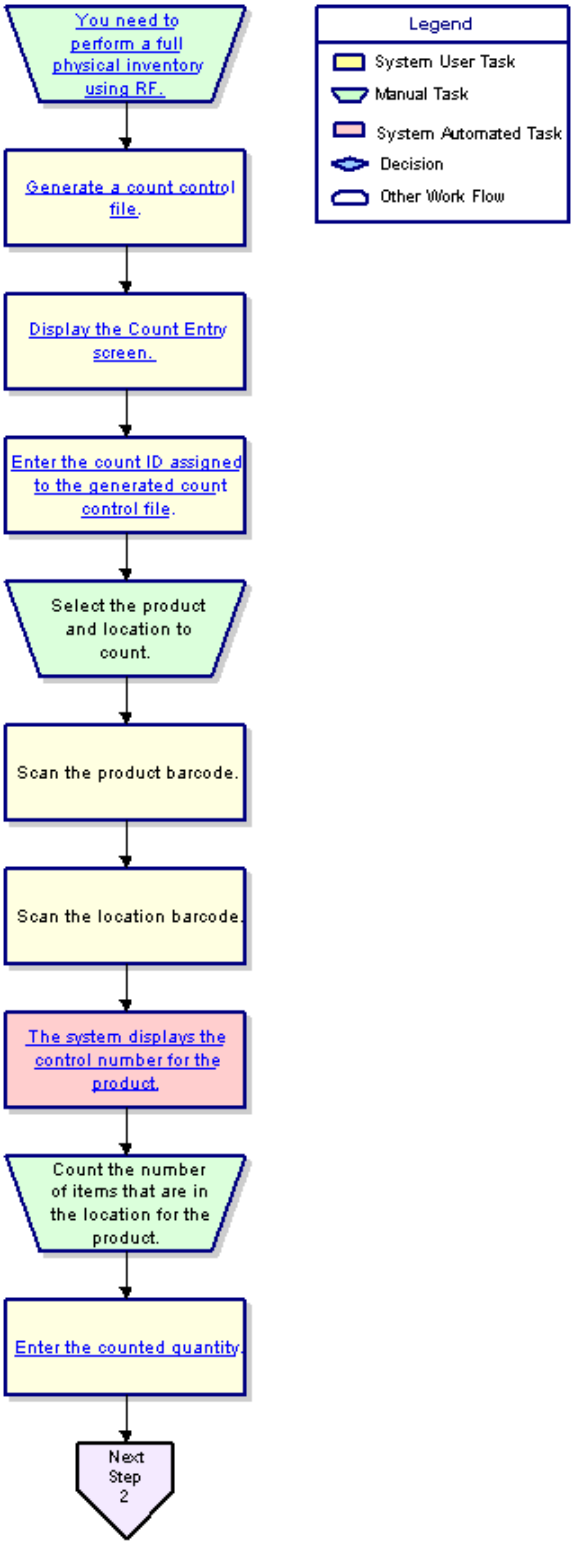
Performing RF User-Directed Cycle Counting Workflow



Resolving Cycle Count Quantity Variances in RF Workflow



Performing a Physical Cycle Count in RF Workflow



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