ERS

Effective Barcode Solutions

ERSSTOCK
INVENTORY SOFTWARE FOR PC

INSTALLATION GUIDE - v 1.01

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1.0 INTRODUCTION

ERSStock is an simple-to-use inventory control system designed for the small to medium sized user.

ERSStock uses barcodes to control inventory via stock movement transactions made via portable barcode reading devices such as the compact CPT8001 terminal, or the OPN2001 data collector. Alternatively stock may be booked IN and OUT directly to ERSStock using a suitable barcode scanner connected to the PC.

In addition to tracking current stock levels the system maintains a record of all historical stock movements, enabling reporting on stock despatched over specified periods of time, or on specific shipments for example, or stock received over time or from certain suppliers etc.

ERSStock may be supplied as a low-cost single-user system, or configured for multi-user operation. A range of optional software modules are also available to enable additional functionality including stocktaking, barcode label printing, website updating etc.

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2.0   INSTALLING ERSSTOCK AND ASSOCIATED DRIVERS

To install the ERSStock application and associated hardware drivers proceed as summarised below.

2.1 INSTALLING ERSSTOCK

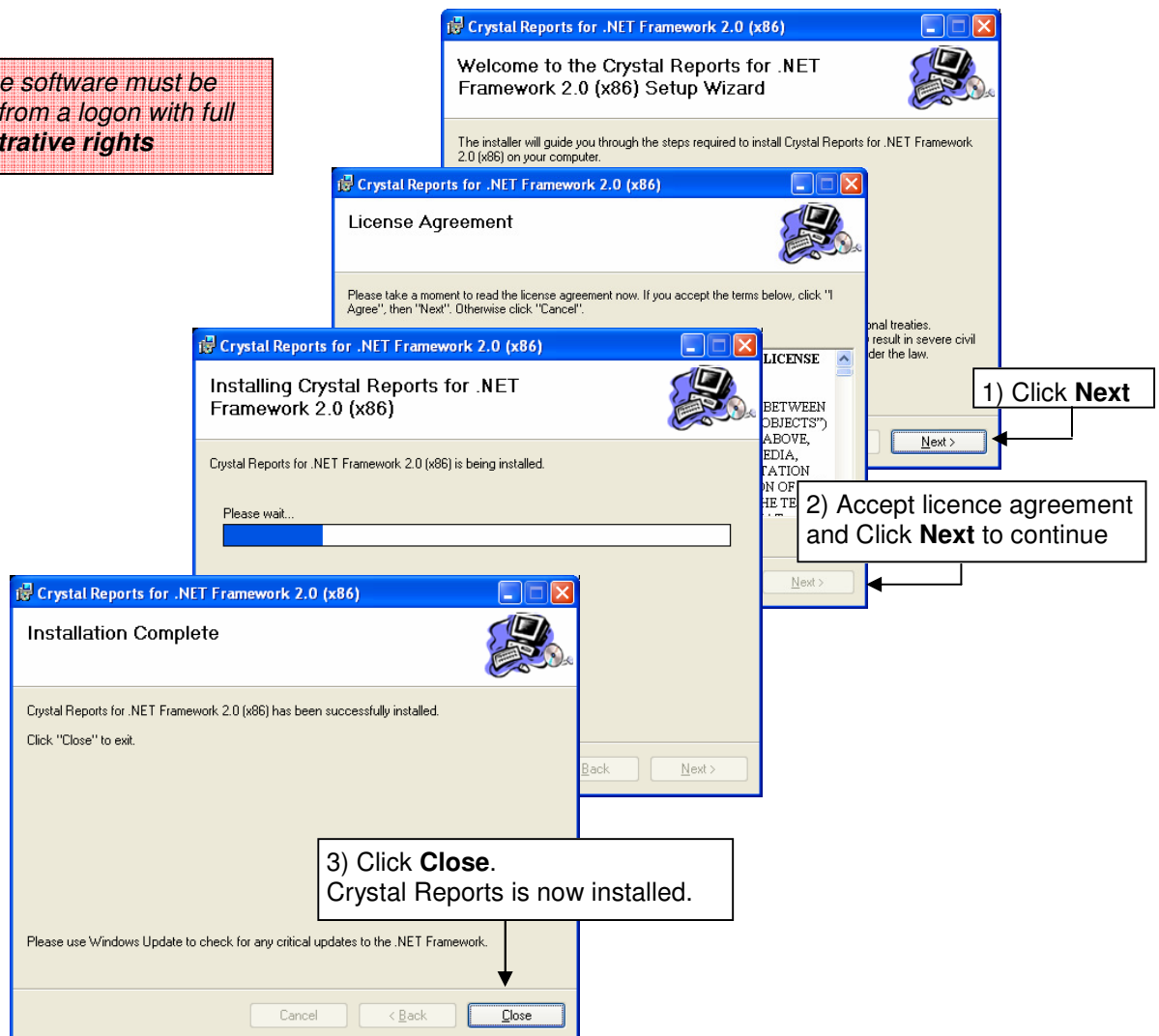**NOTE:** *The .NET 2.0 Framework is a prerequisite of the ERSStock application.*

The .NET 2.0 Framework may be downloaded from the ERS website *or direct from* Microsoft. *(Approximately 22MB download)*

Installing ERSStock is a 2 step process, as follows:

Step 1. Execute the Microsoft Installer file **CRRedist2005_x86.msi** from the **PCInstall** folder on the CD and proceed as follows:

The screenshots below are based on XP. Other operating systems may differ.

Note: The software must be installed from a logon with full **Administrative rights**

1) Click **Next**

2) Accept licence agreement and Click **Next** to continue

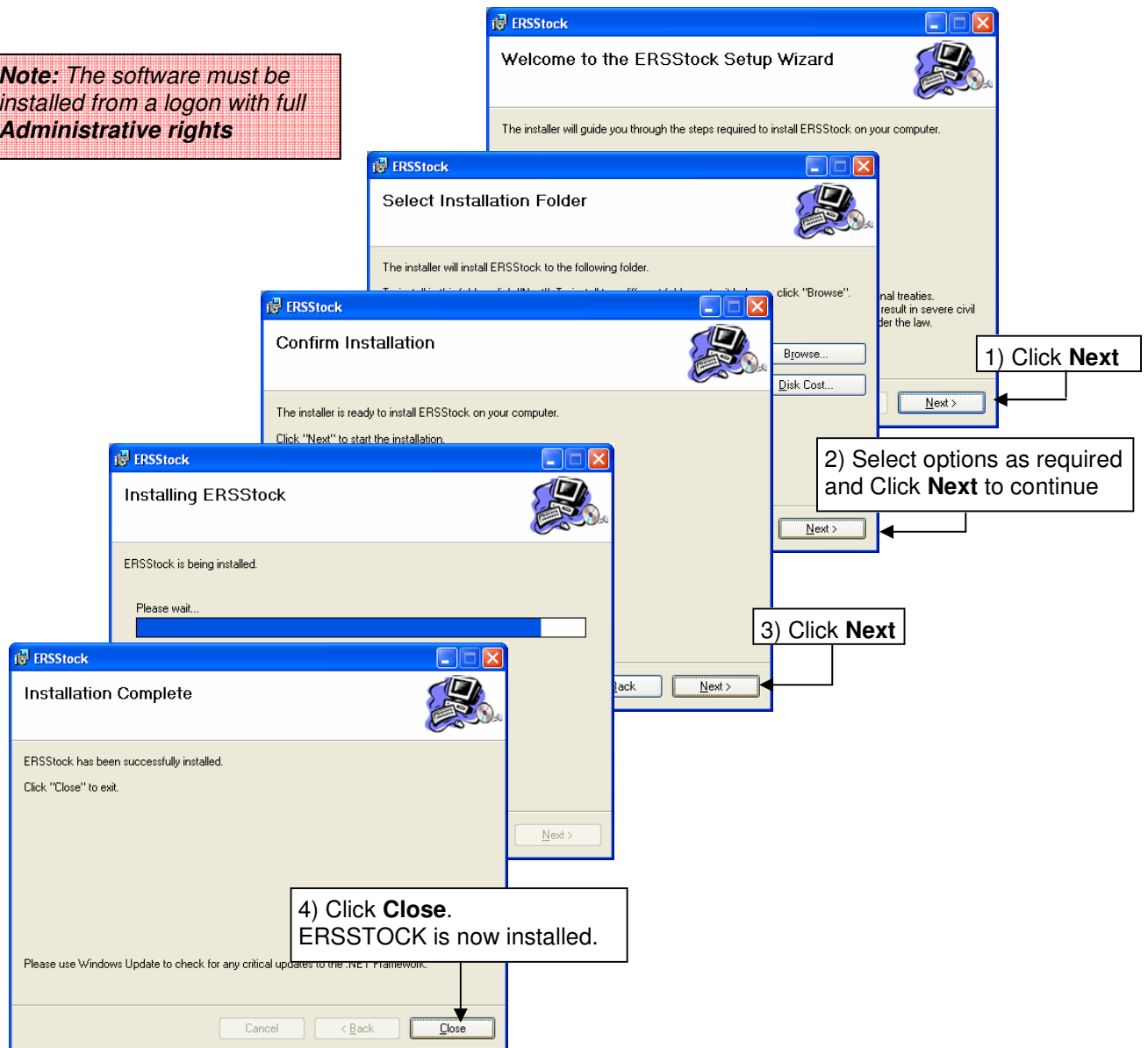3) Click **Close**.
Crystal Reports is now installed.

Continued below/...

Step 2. Execute the Microsoft Installer file **Setup.exe** from the **PCInstall** folder on the CD and proceed as follows:

The screenshots below are based on XP. Other operating systems may differ.

Note: The software must be installed from a logon with full Administrative rights

ERSStock

Welcome to the ERSStock Setup Wizard

The installer will guide you through the steps required to install ERSStock on your computer.

ERSStock

Select Installation Folder

The installer will install ERSStock to the following folder.

To install in this folder, click "Next". To install to a different folder, enter it below or click "Browse".

Browse...

Disk Cost...

1) Click **Next**

Next >

ERSStock

Confirm Installation

The installer is ready to install ERSStock on your computer.

Click "Next" to start the installation.

2) Select options as required and Click **Next** to continue

Next >

ERSStock

Installing ERSStock

ERSStock is being installed.

Please wait...

Back   Next >

3) Click **Next**

ERSStock

Installation Complete

ERSStock has been successfully installed.

Click "Close" to exit.

Please use Windows Update to check for any critical updates to the .NET Framework.

4) Click **Close**.
ERSSTOCK is now installed.
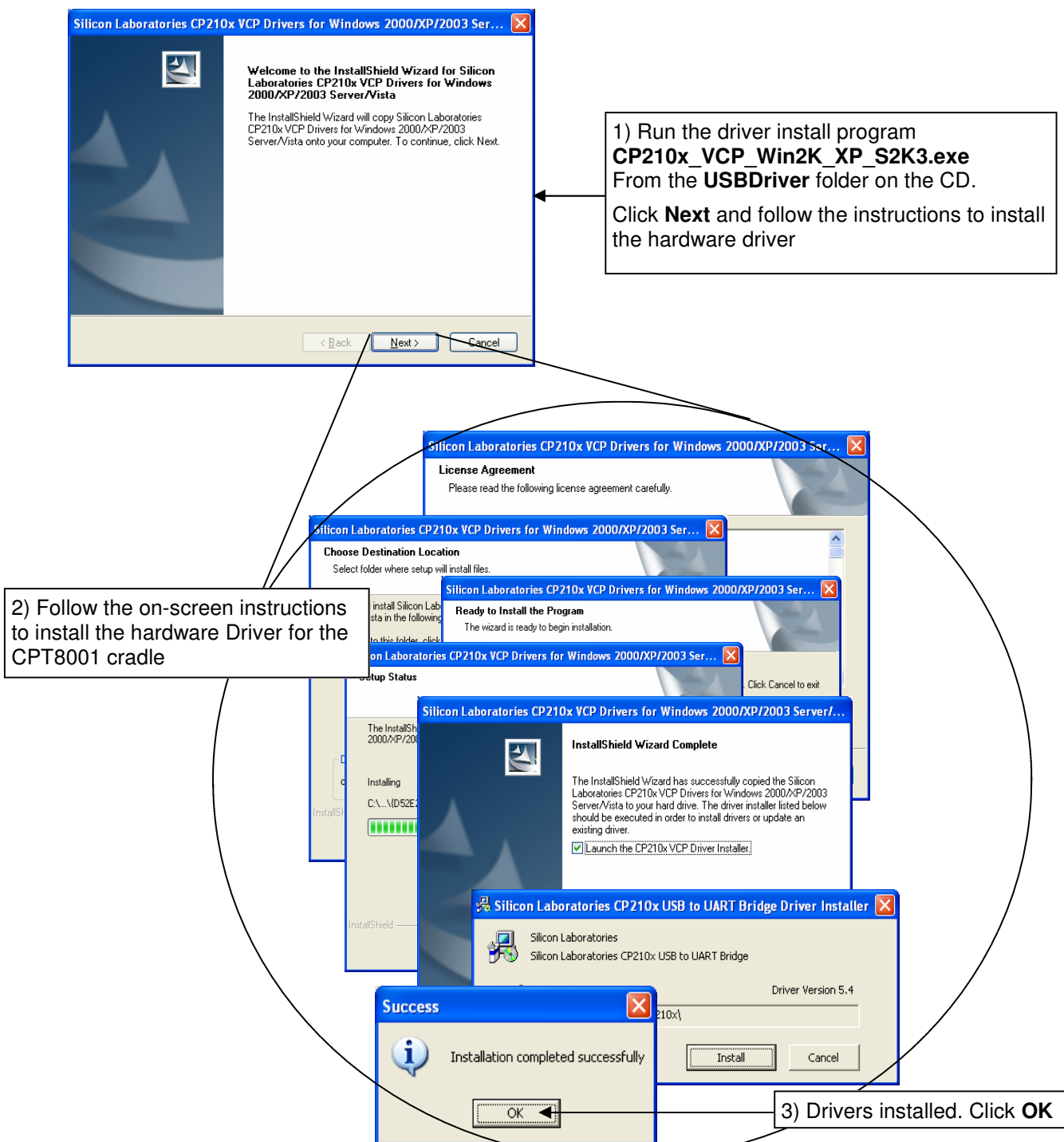
Cancel   < Back   Close

2.2 INSTALLING THE HARDWARE DRIVERS

2.2.1 CPT8001 Portable Terminal

This section summarises installation of the drivers for the USB communications cradle for the CPT8001 data collection terminal. *This section can be omitted if the CPT8001 terminal is not being used, or if the CPT8001 is being used with an RS232 connected Cradle*

To install the USB drivers proceed as below:

NOTE: Do not connect the CPT8001 Cradle to the PC USB port until the drivers have been installed.

1) Run the driver install program **CP210x_VCP_Win2K_XP_S2K3.exe** From the **USBDriver** folder on the CD.

Click **Next** and follow the instructions to install the hardware driver

2) Follow the on-screen instructions to install the hardware Driver for the CPT8001 cradle

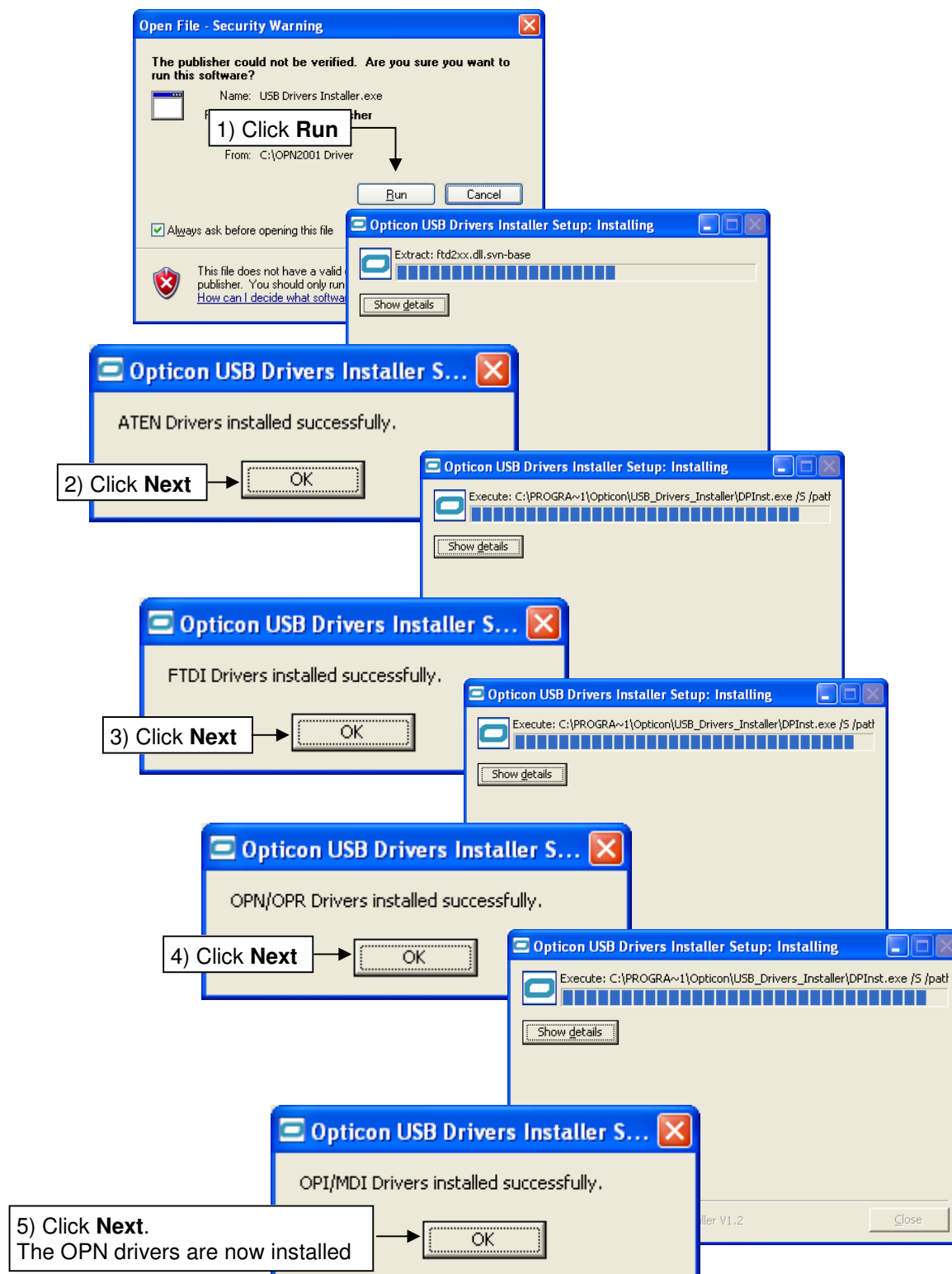3) Drivers installed. Click **OK**

2.2.2 OPN2001 Data Collector

This section summarises installation of the drivers for the OPN2001 data collector.
This section can be omitted if the OPN2001 Data collector is not being used.

To install the OPN2001 drivers run the Driver Installer **USB Drivers Installer.exe** and proceed as below:

NOTE: *Do not connect the OPN12001 to the PC USB port until the drivers have been installed.*

Open File - Security Warning

The publisher could not be verified. Are you sure you want to run this software?

Name: USB Drivers Installer.exe

From: C:\OPN2001 Driver

1) Click **Run**

Run   Cancel

☑ Always ask before opening this file

This file does not have a valid publisher. You should only run How can I decide what softwa

Opticon USB Drivers Installer Setup: Installing

Extract: ftd2xx.dll.svn-base

Show details

Opticon USB Drivers Installer S...

ATEN Drivers installed successfully.

2) Click **Next** → OK

Opticon USB Drivers Installer Setup: Installing

Execute: C:\PROGRA~1\Opticon\USB_Drivers_Installer\DPInst.exe /S /path

Show details

Opticon USB Drivers Installer S...

FTDI Drivers installed successfully.

3) Click **Next** → OK

Opticon USB Drivers Installer Setup: Installing

Execute: C:\PROGRA~1\Opticon\USB_Drivers_Installer\DPInst.exe /S /path

Show details

Opticon USB Drivers Installer S...

OPN/OPR Drivers installed successfully.

4) Click **Next** → OK

Opticon USB Drivers Installer Setup: Installing

Execute: C:\PROGRA~1\Opticon\USB_Drivers_Installer\DPInst.exe /S /path

Show details

Opticon USB Drivers Installer S...

OPI/MDI Drivers installed successfully.

5) Click **Next**.
The OPN drivers are now installed → OK

...ller V1.2   Close

The drivers automatically allocate a 'virtual' COM port for the OPN2001 allowing it to operate just as if it were plugged into one of the PC COM ports. OPNStock will automatically detect the allocated COM port.

Note that OPNStock expects only 1 OPN2001 to be connected to the PC at a time.

2.2.3 B-EV4T Label Printer

This section may be omitted if the Barcode Label printing option is not being used.

Before using the label printing option in ERSStock it will be necessary to install the printer driver and install the ribbon and labels as described in the relevant printer documentation.

The driver will usually be supplied on the printer CD however the latest version may be obtained from the manufacturer's website, or by contacting ERS.

3.0   LICENCING ERSSTOCK

After initial install ERSStock will run in demonstration mode. This mode limits the number of products that can be entered into the database.

To release the software and fully enable relevant features proceed as follows:

1) Click **Help - Licence Management** from the program menu bar

2) Click **Change Licence**

3) From the displayed Keycode ERS can advise the appropriate release code for your installation.
This can be provided instantly over the telephone if required, however if forwarding the Keycode via email do not close the **Enter Release Code** Window whilst awaiting the Release Code.
Enter the release code and click **OK**

4) The release code is accepted and the relevant modules released for operation. The software is now licenced.
Click '**X**' to exit from Licence management

4.0 CREATING THE DATABASE

Before using ERSStock it will be necessary to create the system database. The procedure to do this will depend on whether ERSStock is being used as a single user system (using a 'Compact' SQL database), or as a multi-user system (using an SQL Server or SQL 'Express' Server database).

4.1 CREATING AND CONNECTING TO A SINGLE USER DATABASE (SQL 'COMPACT' EDITION)

To create the database proceed as follows:

1) Click **Tools - Options** from the program menu bar

2) Ensure **Server Type** is set to **SQL Server Compact Edition**. (If running the single user version of ERSStock this will be the only available option)

3) Click Create Database

4) Browse to the required database location, specify a name for the database and click **Save**

5) The database has been created. Click **OK** to proceed

Database creation successful.

6) Click **Yes** to connect ERSStock to this database.

Would you like to make this database your active database?

4.2 CREATING A MULTI-USER DATABASE (SQL SERVER/ SQL EXPRESS SERVER)
Note: This section describes the creation of the ERSStock Database onto an existing SQL Server or SQL Express Server. If necessary SQL Server Express and associated Management Studio can be downloaded from Microsoft and installed on the relevant PC or server prior to installing ERSStock. (For convenience a copy of SQL Express Server 2005 is also included on the ERSStock CD)

The first step is be to create a blank SQL Server database to which ERSStock will connect. To create the blank shell and connect ERSStock proceed as follows:

The screen shots below relate to SQL Server Express 2005 and may differ in detail depending on the specific version of SQL Server used.

STEP 1. CREATE A BLANK DATABASE 'SHELL' FOR ERSSTOCK

a) Run the **SQL Server Management Studio** or **SQL Management Studi Express**, right-click **Databases** and select **New Database...**

b) Enter a name for the database. Click **OK**. (Leave **Owner** set to Default)

c) The new database appears in list of databases.

STEP 2. CREATE A USER LOGIN FOR THE DATABASE

a) From the SQL Server Management Studio right-click **Security** and select **New** > **Login...**

b) Enter a Login name, and password and ensure that the login is set for **SQL Server Authentication.** *(NOTE: Do not set for Windows auhentication).* Disable **Enforce Password Policy**

d) Click **User Mapping**

Remember the username and password. These will subsequently be needed to configure the database connection parameters in ERSStock

c) Set Default database for this login to the ERSStock database created above

e) Specify the database to be mapped

f) Ensure the login is set as a **db_owner**. Click **OK**

STEP 3. SET UP DATABASE AUTHENTICATION

a) Right-click the SQL Server and select **Properties**

b) Click **Security**

c) enable SQL Server and Windows Authentication mode. Click **OK**
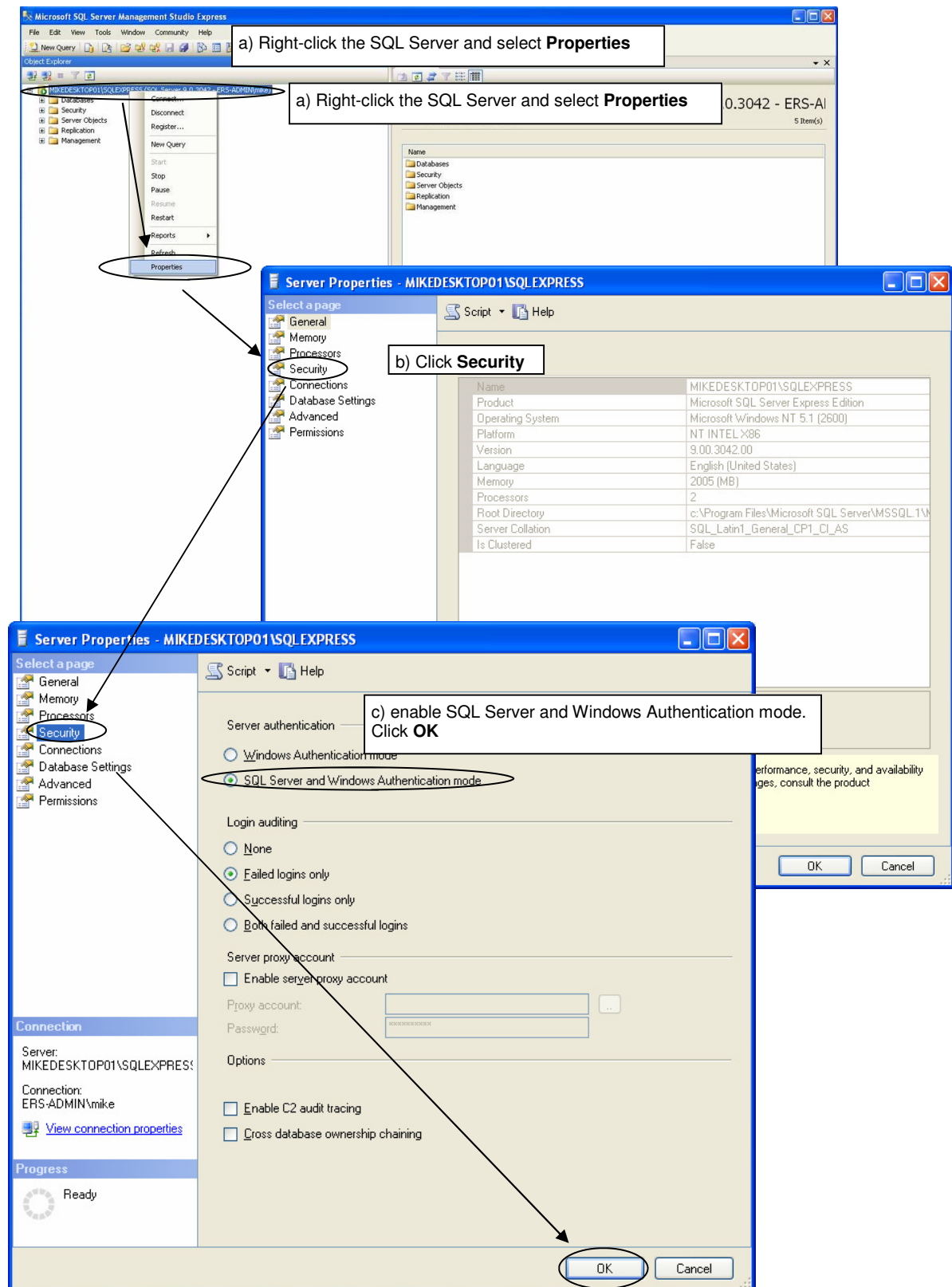
STEP 4. RUN SCRIPT TO FORMAT THE DATABASE FOR ERSSTOCK

a) Click **File** > **Open** > **File**...

b) Browse to the **ERSStock.sql** file from the **Database** folder on the ERSStock Installation CD, and click **Open**

d) Make sure the correct database is selected from the drop down list and click **Execute** to run the **Create ERSStock Tables.SQL** file

e) Database tables created successfully. **SQL Management Studio** may now be closed

STEP 5. CONFIGURE THE SQL SERVER FOR NETWORK CONNECTIONS
(NORMALLY REQUIRED FOR SQL SERVER EXPRESS ONLY)

a) Run the **SQL Server Configuration Manager**.
Expand **SQL Server 2xxx Network Configuration** and
click **Protocols for SQLExpress**

b) Right-click **TCP/IP** and select **E nable** to enable network communications.

Warning

Any changes made will be saved; however, they will not take effect until the service is stopped and restarted.

OK

c) Click **OK**

d) Right-click **Restart**

SQL Server Configuration Manager

Stopping service...

e) The SQL Server is stopped and restarted to implement the change made above.

SQL Server Configuration Manager

Starting service...

Close

f) The database has been configured

STEP 6. ENABLE BROWSING TO THE SQL SERVER (*Optional*)

ERSStock supports browsing to the SQL/ SQL Express Server when configuring the database connection (see section 4.2.1 below).

In order to be available for browsing the SQL Server Browser service must be running. To check this run the SQL Server Configuration Manager and proceed as follows:
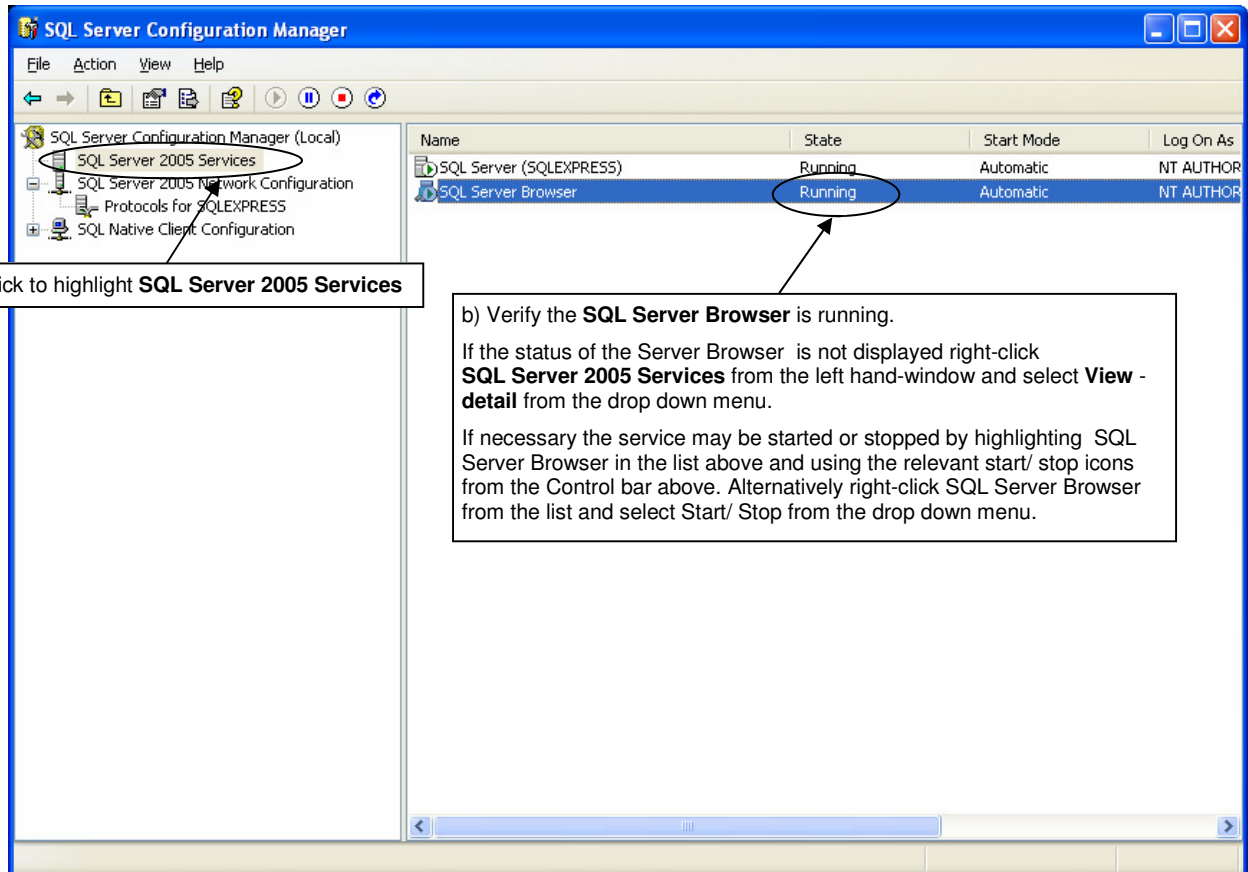
Note: If the SQL Server is not enabled for Browsing it will be necessary to manually enter the full URL of the Server when configuring ERSStock to connect to the database in section 4.2.1 below

4.2.1 Connecting to the SQL Server/ SQL Express Server Database

To connect ERSStock to the SQL Server or SQL Express Server database proceed as follows:

1) Click **Tools** > **Options** from the ERSStock menu bar

2) From the **Database** Tab Set the Server type to **Database Engine** and click **Browse** to find the relevant SQL Server

3) Expand **Database Engine** to list all available SQL Servers and select the relevant SQLServer from the list .

If the server does not appear in the expanded list try manually entering the full URL under Server name in step 2 above instead of browsing.

4) Click **OK.**

5) Enter the database Username and Password

6) Browse to the database

7) Expand the SQL Server and select the relevant Database from the list.

9) Click **OK**.
ERSStock is now configured for the SQL Server Database

8) Click **OK.**

5.0 CONFIGURING ERSSTOCK

There are a number of user configurable options for ERSStock. To configure these options proceed as shown below:

5.1 Configuring the Stock IN/OUT Prompt Sequence:

ERSStock supports stock movements IN or OUT of the warehouse via one of the portable data capture devices, or direct at the PC using a suitable barcode scanner. To configure the prompt sequence for stock movements made at the PC proceed as follows:
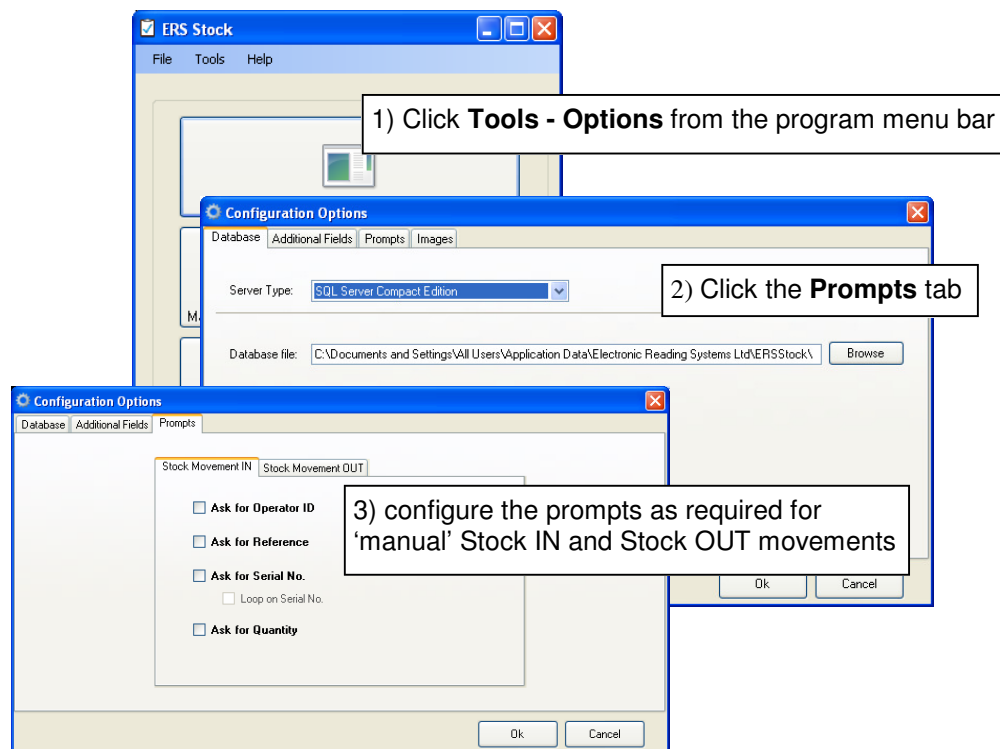
Operator ID & Reference: Each stock booking can be associated with an Operator ID and a booking Reference if required which will be logged against each item booked under that Stock IN or OUT transaction.

This allows the operative performing the transaction to be logged and for example allows tracking of the Customer Account Code or Project to which items being booked OUT, or allows a PO No. or GRN No. to be logged against items received.

Reports may then be run to show stock despatched to specific customers over specified periods, or stock received from given suppliers etc.

Enabling **Ask for Quantity** will prompt the operator to enter a Product Code and Quantity when making a stock movement. This is the normal setting if tracking of product serial nos. is not required.

Enabling **Ask for Serial No**. will prompt the operator to enter a Product code and product Serial No. when making a stock movement. In this way ERSStock will both update the overall stock level of products being booked, and log the individual Serial nos. of those items for warranty purposes.
By default when **Ask for Serial No.** is enabled ERSStock will loop on the prompts for Product Code and Serial No. Alternatively, enable **Loop on Serial No**. to set ERSStock to prompt once for the Product Code and then loop on the prompt for Serial no.
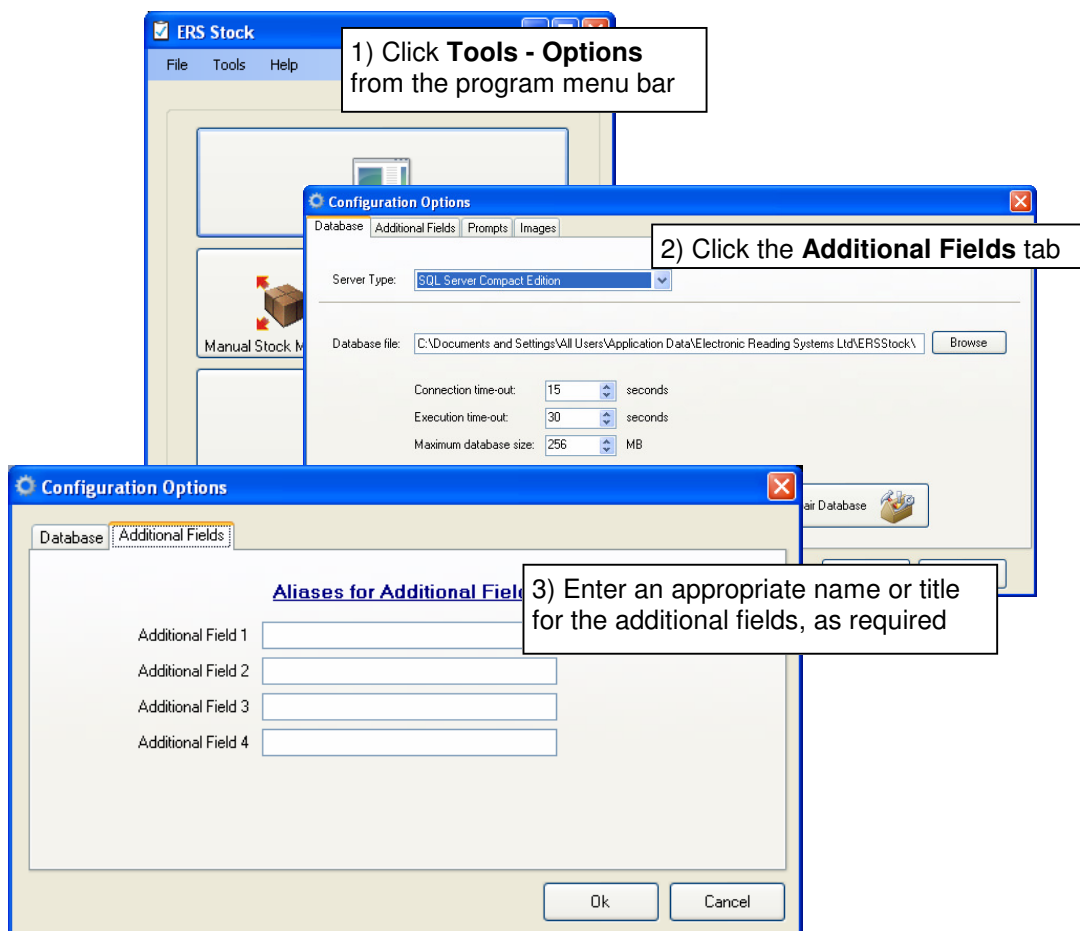
To allow both serial numbered and non-serial numbered products to be booked enable both **Ask for Serial No**. and **Ask for Quantity**. In this case ERSStock will prompt by default for the product Serial No., however if a blank Serial no. is entered the software will prompt for the quantity being booked IN or OUT.

Note: The prompt sequences for Stock movements In or OUT can be configured independently.

5.2 Configuring the Additional Data Fields

The Products database includes 4 unspecified data fields for each item in the database. These are simple text fields which may be used to hold additional data relating to the product and can be used as a selection criteria when searching for products or when running stock reports.
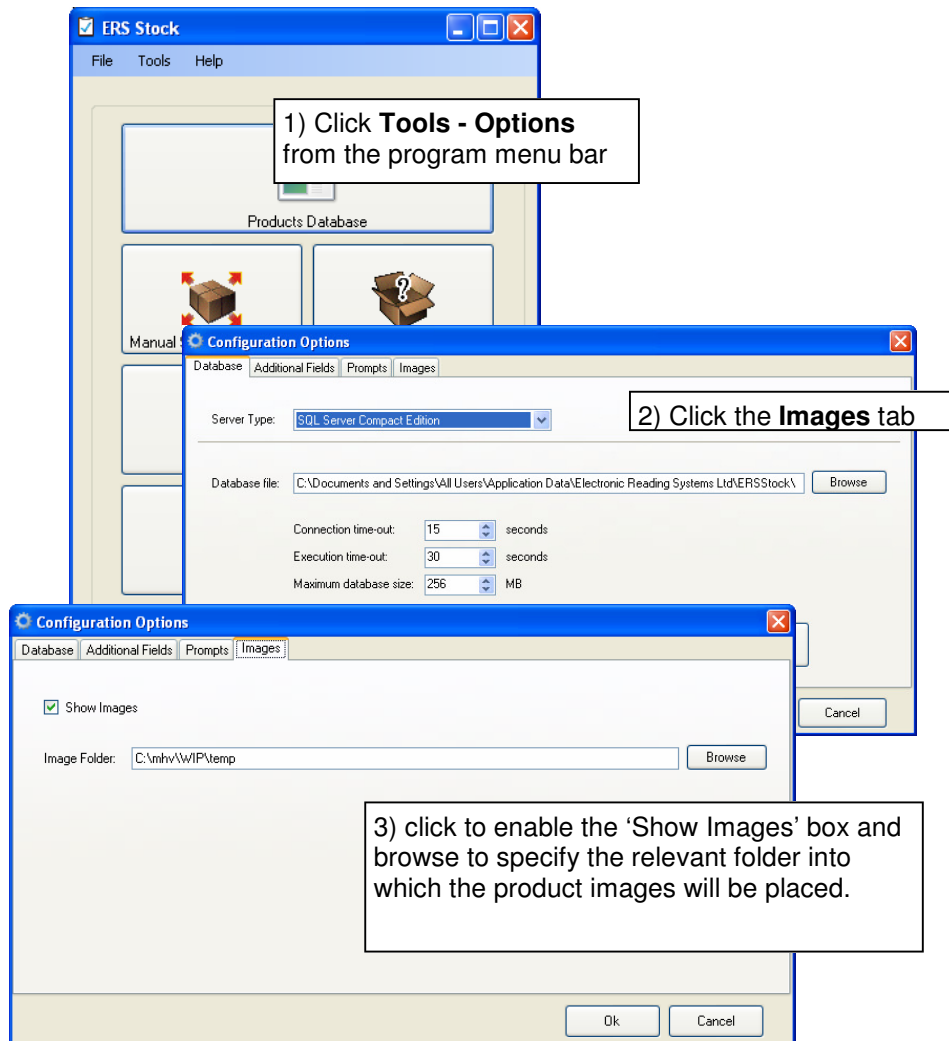
To configure the titles for the additional data fields proceed as follows:

1) Click **Tools - Options** from the program menu bar

2) Click the **Additional Fields** tab

3) Enter an appropriate name or title for the additional fields, as required

5.3 Configuring the Images Folder

Product images may be displayed on the product details screen from suitable image files placed into a user specified folder.

To enable image display and specify the image folder proceed as follows:

1) Click **Tools - Options** from the program menu bar

2) Click the **Images** tab

3) click to enable the 'Show Images' box and browse to specify the relevant folder into which the product images will be placed.

5.4 Configuring the Communications Interface (CPT8001 Only)

To select the communications interface for the data CPT8001 Terminal proceed as shown below.

NB: This step is not required for the OPN2001 data collector.

1) Click **Transfer Data** from the main program screen

2) If required select **CipherLab CPT8001** from the drop down list and click **OK.**

Note: This screen will only be displayed if both CPT8001 *and* OPN2001 data collection devices are being used

3) click to toggle the communications interface between USB and RS232.

If using RS232 the relevant COM port must also be selected from the drop down list

Note: *The default communications for the CPT8001 terminal is USB. RS232 is available as an option.*

6.0   NEXT STEP

ERSStock is now installed and configured, and ready for use. Please refer to the User Guide as required for relevant instructions.

Note: The CPT8001 portable terminal incorporates a number of user configurable features. If using this terminal please therefore configure the terminal for your specific requirements before using the ERSStock system.