

Optimus Installation – Configuration – Use

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This document will help you install the Optimus software, add the hardware to the system, configure software, and how to use the unit for physical inventory.

The information is sectioned into three areas:

- Installation
- Configuration
- Use

Installation

Installing the Optimus Software

1. Load the Optimus software from the CD-Rom.
 - a. Browse to your CD-Rom and double-click

OptimusSoftware 1.99.01.exe
 - b. Click Next, Next Finished.
 - c. The Optimus software is now installed.
2. Plug in the power cord to the Optimus base unit.
3. Plug in the USB cord into the Optimus base unit and then in into the back of the computer.
4. Windows will alert you that it found New Hardware.
5. If Windows automatically installs the software and says that your hardware is ready to use, proceed to Locating The Port number. Otherwise continue to step 6.
6. You will be asked, can windows connect to windows update to search for software?
 - a. Click no not at this time.
 - b. Click Next.
7. Click Install from list or specific location.
8. Click Include this location in the search
 - a. C:\Program files\Metrologic Instruments\Optimus Software\USB Driver
9. Click Next.
10. Click Continue Anyway
11. Click Finish.
12. This process will repeat so perform steps 4 through 9 again.

Configuration

Locating The Port Number

1. Click Start | Control Panel | System | Hardware | Device Manager.
2. Click Ports (Com & LPT)
3. Look for

Optimus WHQL Bridge Controller (COM"X")

Or

Silicon Labs CP210x USB to UART Bridge (COM'x')

4. Write down the COM number.
5. Close these windows.

Setup The Type Of Scan

++ NOTE: I already programmed the collector to do id number and qty on the same line
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Your Optimus data collector has been preprogrammed to scan barcodes and than have you enter a quantity for the item scanned.

If you want to change the scanning method so that you have to scan every item's barcode (without entering a quantity), follow the instructions below.

1. Insert the CD-Rom called Optimus Utilities
2. Click Start | All Programs | Optimus Software | Utilities | Op_Load
3. Click Browse.
 - a. Browse to the CD-Rom
 - b. Choose ID Number Only.opt
If you only want to scan item ID Numbers
 - c. Choose ID Number, QTY on one line.opt
If you want to scan an ID number than enter a quantity.
Click Ok
4. Choose the Com port number - The number you wrote down in Locating The Port Number step 4.

5. On the Optimus unit
 - a. Turn on the unit by pressing and holding in the power button (red, bottom right).
 - b. Put the unit in the cradle. inv
 - c. Press 3 for Utilities
 - d. Press 1 for Transfer files
 - e. Press 1 for Get Program
6. Now press OK at the bottom of the Op_Load Screen.
7. When it is done configuring, it will say “Downloaded completed”
8. Click Cancel to close the window.

Setup Up The Data Transfer

1. Click Start | All Programs | Optimus Software | Utilities | Data-Read
2. Set Directory – C:\Program Files\Phoenix
3. Set File Name – inv.txt
4. Set Com Port Number – To the number you wrote down in Locating The Port Number step 4.
5. Turn on the Optimus Unit.
6. Press 1 for Run Program.
7. Scan a UPC code – we need an ID number in the scanner to test the upload.
 - a. You scan by pressing the orange button.
 - b. You will here a beep.
8. Press ESC to exit the scanning mode.
9. Now we will test the upload.
10. Press 3 for Utilities (even though it shows 2)
11. Press 1 for Transfer Files
12. Press 2 Send Data
13. Set the Optimus unit into the cradle.
14. Click OK on the computer screen.
15. The Optimus will send data to the computer.
16. The software will tell you it received 1 record. Click No.
17. Click Cancel to exit the Data Read program.
18. On the Optimus
 - a. Press 1 Clear all records
 - b. Press 1 Yes
19. The Optimus software is setup.

Use

Taking Inventory

When taking inventory for use in Phoenix, you take an inventory of your rental product and a separate inventory of your merchandise items (items in the merchandise database).

1. Turn on the Optimus unit.
2. Press 1 for Run program.
3. You will be asked to enter id number.
 - a. Either scan the UPC of the product or type in into the keyboard.
4. When you have scanned your inventory, Press ESC.

Uploading The Data To The Computer

1. Get the Data Read program stated by clicking
Start | All Programs | Optimus Software | Utilities | Data-Read
2. The port number and text file should already be setup from the prior steps.
3. Turn on the Optimus Unit and set it in the cradle.
4. Press 3 Utilities (even though the unit shows 2).
5. Press 1 Transfer files.
6. Press 2 Send Data.
7. On the Data Read program (on your computer) press OK.
8. The inventory will be transferred from the Optimus to the computer.
9. When it is completed the upload, clear the records from the unit by
 - a. Press 1 Clear All Records
 - b. Press 1 Yes.

Physical Inventory – Phoenix

Now you import the data you uploaded from the unit into Phoenix to perform an inventory report and reconciliation.

1. Click Phoenix Utilities from the main menu.
2. Login.
3. Click Data manipulation.
4. Click either Rental Product or Merchandise Physical Inventory.
5. Click Erase to make sure there are no records in the Phoenix inventory table.
6. Click merge.
 - a. Using ID Number or ID Number and qty (based on how your Optimus is setup).
7. Browse to the file we uploaded
 - a. C:\program files\Phoenix\inv.txt
8. If you are performing an inventory on a section [broken down by department or category or pricing category], then set the appropriate filter. For example, if you are taking inventory of just your “Candy” department, apply a filter on the

merchandise department to be equal to “Candy”.

If you are taking an inventory of your entire store, then you do not need to apply a filter.

9. Print Report

- a. Now you can review the discrepancies.

10. Exit

11. Would you like to make the values match

- a. If you want the on hand values to match what you have just scanned, click Yes. This will adjust the on hand quantity of each merchandise item and change it to how many you scanned using the Optimus unit.
- b. Then erase the data and click Yes to confirm.