



Falcon Automation™ for the Hansen7® Stockroom

Installation and Implementation Plan

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**

**To ensure a successful implementation,
Please read the Responsibilities section below**

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System Components Defined

Modules: Falcon Automation™ for Hansen®

- Falcon Automation MobileServer™
 - The MobileServer is used in both, single and multi-managed multiple warehouse environments. The MobileServer handles the communications to and from Hansen.
 - See appendices 2 and 3
- Falcon Automation MobileBridge™
 - The MobileBridge is used for multi-warehouse environments where each warehouse is managed autonomously. The MobileBridge handles communications between the mobile devices and the MobileServer. Single warehouse environments do not require a mobile bridge.
 - See appendix 3
- Falcon Automation MobileClient™
 - The MobileClient is the mobile device user interface. The MobileClient communicates Hansen transactions through the MobileServer or MobileBridge/MobileServer combo.
- Falcon PrintConsole™ (Barcode labels)
 - The PrintConsole is a stand-alone software application that utilizes the Falcon database for printing the customer's Hansen parts, locations, stock areas and employees.
- Administrative Server Console (included via the MobileServer/MobileBridge)

Third-party software

- Seagull Scientific BarTender Enterprise Ed. – unlimited users / 3 (or 5) printers
 - BarTender client software for creating or modifying barcode labels
 - Seagull License Server – required for managing software usage

Hardware

- Mobile computer (WindowsMobile with integrated barcode scanner)
- Single communications dock / charger w/ A/C adapter
- Trigger handles
- ActiveSync USB cable
- Barcode label printer
- Barcode direct-thermal media (labels & ribbon)
- Windows XP PC
 - Network Interface Card (NIC)
 - Static IP Address
 - Hansen client installed

- MobileServer (dedicated for real-time system)
 - Or, MobileBridge (may be installed on warehouse managers PC)

Implementation

Summary

The system will be installed and configured in stages:

1. Establish a “Test” Hansen database (using recent production data);
2. Mobile and barcoding hardware setup, configured and tested;
3. Label printing setup, configured and tested;
4. MobileServer setup, configured and tested;
 - a. MobileBridge (where applicable) setup, configured and tested;
5. Work closely with warehouse managers describing system’s operation;
6. Establish with managers, a user training plan;
7. Train users;
8. MobileServer set to Production Hansen database; the system is set live.

((Please review the Responsibilities section of this document.))

Installation, Configuration and Testing

Typically, 3 days onsite for JMT staff is recommended for installation, configuration, training and first-day on-site support. JMT prefers to send a two (2) person installation team to ensure a successful install.

JMT would appreciate having the following personnel available for questions and comment during the installation and training process:

- Warehouse management
- A member of the customer I.T. staff.
 - *We understand that I.T. scheduling can be tight – we do not expect an I.T. staff member onsite at all times, but we need quick access to answer networking questions or to provide network support via phone or email.*

Approach

The typical three day installation goes as follows:

Day 1:

- Brief warehouse tour by warehouse manager/s and IT staff member.
- Kick off meeting – go over this document, discuss roles and requirements
- JMT staff to begin setup, installation and testing

Day 2:

- JMT staff to complete setup, installation and testing
- JMT to help train and plan warehouse labeling

- Warehouse staff implements the labeling plan
- JMT to explain and train system use to managers and IT
 - Decide a user training plan
- JMT to assist warehouse manager with user training

Day 3:

- Complete any user training necessary
- Set system into Production mode
- JMT staff available for support

To make the installation as efficient and productive as possible, we suggest the following process of events for Day 1:

- Warehouse tour (~ ½ hour)
 - Upon arrival, we would like to get an initial warehouse tour so everyone is familiar with all aspects of the layout. Including inspection of the new wireless network infrastructure.
- Initial meeting (~ 1 hour)
 - Upon arrival we would like to hold an initial meeting with the warehouse management team and appropriate IT personnel.
 - This meeting will be utilized to discuss and draft the installation, implementation and training plan. It will be an open forum to lay a final plan and to help keep everyone apprised and on track.
- Hardware installation (~ 3-4 hours)
 - MobileServer –Dedicated networked PC with Hansen installed.
 - Install BarTender® software
 - Install Seagull Printer Driver
 - Install Falcon MobileServer
 - MobileClient – Mobile Computers
 - Wireless configuration
 - Wireless access points should be installed and tested prior to implementation – if they are not JMT needs to be notified.
 - Customer I.T. personnel should either
 - Be available to configure the wireless network protocol setup, or
 - Be accessible to provide wireless network protocol setup information to JMT personnel for configuration.
 - JMT will test each device for network connectivity (customer IT staff should have already ensured this) and communications with the MobileServer.
 - JMT will test each device throughput processing with Hansen via the MobileServer.

- JMT will perform a low scale wireless site survey using the MobileClient software to help determine the out-of-range boundaries.
- Label Printing
 - The label printer will be installed and configured to network specifications.
 - I.T. staff may be called upon for assistance or information.
 - Printer requires a 10baseT connection (not 100baseT).

Training: User and Management

User and management training will be held on the second day, after installation and testing has been completed. We always prefer a train-the-trainer approach to teaching the use of our systems. This approach is implemented as follows:

- We train the warehouse managers in use of the system (scanners and management console).
- With our assistance, the warehouse managers will train their staff.

Experience has proven this approach to increase user acceptance to a new system, while giving confidence to the managers to teach and support their own staff. At the same time, users soon gain the same confidence to help support each other. We will assure that the staff is confident in use of this system.

Additional Development

No additional development is necessary for this install.

Delivery Expectations

Components installed during the on-site installation

All hardware will be installed during the on-site installation. Upon completion, the following software components will be installed:

- Falcon Automation MobileServer on one dedicated PC
- Falcon Automation PrintConsole
 - Falcon Automation MobileClient on all scanners
- Seagull Scientific labeling software
 - Seagull Scientific License Server on the dedicated Falcon MobileServer
 - On PCs licensed to use the JMT PrintConsole:
 - BarTender Enterprise using existing barcode label formats
 - Seagull Scientific printer driver

Components installed following the on-site installation

None - All purchased components will be installed and tested during the on-site installation

Responsibilities

*****PLEASE NOTE:** To maintain a successful installation, each party (JMT and customer) must perform its responsibilities timely and appropriately. If there are any questions or concerns, we invite you to please contact us at your earliest opportunity. We are eager to make this installation successful for you.

Responsibilities prior to on-site installation

- **Customer responsibility**
 - Install WiFi Access Points and configure WiFi network
 - Ensure coverage via site survey
 - Configure mobile computers to communicate with WiFi network
 - Ensure coverage and network communication connectivity
 - Hansen group/user setup
 - Create a Falcon Access Control Group in Hansen, example shown may differ at your location. Configure as close to the example as possible, JMT will further refine the configuration while onsite: **(See Appendix 1 Figure 1)**
 - Assign the Group Access appropriate to your Hansen build.
 - See Appendix 1 for details
 - NOTE: Each Hansen build is different and may require adjustments while we test the system. Get your Group Access set as close as possible and we will work with you to get the configuration working properly with your particular build.
 - Create a "Falcon" user, assign it to the Falcon group
 - Run JMT's Falcon Test Utility to determine proper rights assignment (available from JMT).
 - *This utility may report inaccurate results for those with "Basic Inventory" builds – its okay, send us the results anyway*
 - Hansen test environment setup:
 - Copy production Hansen database into Test database
 - On MobileServer/s, create ODBC/DSN that references Test database
 - Dedicated Falcon MobileServer/MobileBridge setup¹:
 - PC Recommended Specifications:
 - Windows XP Pro
 - 8 GB hard drive
 - 512 MB RAM
 - Network Interface Card
 - Power strip / surge protection for PC
 - Network connectivity
 - Dedicated IP Address required

¹ If desired, as a Professional Service, JMT will setup, install and configure the Falcon Server PC.

- Enable firewall TCP port 1300
 - Enable firewall TCP port 5160, if Seagull License Server
 - (typically installed on the MobileServer)
 - Install Hansen (MobileServer requirement only)
 - Configure Test data source
 - Configure Production data source
 - Provide remote access (for JMT support, preferred)
-
- Barcode labeling printer setup
 - Provide a power source to printer
 - Provide a source of network connectivity
 - If static IP address assigned
 - Label formats
 - If customer has redesigned formats, the BTW format file should be designed and sent to JMT for testing.

 - Provide JMT with the following information:
 - Falcon MobileServer/Bridge IP addresses (static required)
 - Printer/s IP address (if static)

 - Schedule the following for onsite availability
 - Warehouse manager/s
 - IT staff (on call for potential setup assistance)
-
- **JMT responsibility**
 - Order/Deliver customer hardware (when applicable)

 - Package/Deliver customer software
 - Falcon Automation
 - Seagull Scientific BarTender

 - If custom work required, detail specifications with customer.

Responsibilities during onsite installation

- **Customer responsibility**
 - Setup morning kickoff meeting with:
 - Warehouse manager/s
 - Key users (if desired)
 - IT contact (if available)

- **JMT responsibility**
 - Conduct morning kickoff meeting:
 - Discuss implementation, testing and training plan
 - Ensure everyone is aware of their part and the process as a whole.
 - Schedule times for:
 - Installation

- Testing
- Pre-training
- Training of trainers

- System installation and configuration
 - Dedicated Falcon Server setup/configuration:
 - Install Seagull Scientific License Server (register)
 - Install BarTender software (register)
 - Install Falcon Automation for Hansen:
 - Install Falcon PrintConsole for Hansen

 - Install and configure mobile hardware with Falcon MobileClient software; configure to access network

- System testing
 - Conduct mobile device network connectivity tests
 - Perform an overview site survey
 - Conduct Part retrieval tests
 - Conduct Reason Code retrieval tests
 - Conduct Employee retrieval tests
 - Conduct Hansen stockroom transaction testing
 - Conduct label printing tests

- Warehouse Labeling
 - Provide consulting support to warehouse manager
 - Assist with warehouse labeling effort

- Training
 - Train warehouse manager/s in admin functionality
 - MobileClient (scanners)
 - MobileServer
 - Train the trainers
 - Up to six key users
 - If time allows, assist with floor user training and monitor live run

Responsibilities for post-implementation

- **Customer responsibility**
 - Enact any administrative policy changes, if required
 - Ensure that the system is put to use
 - Contact JMT with any issues found
 - Keep the system current with JMT software releases

- **JMT responsibility**
 - Check in on customer regularly

Appendix 1

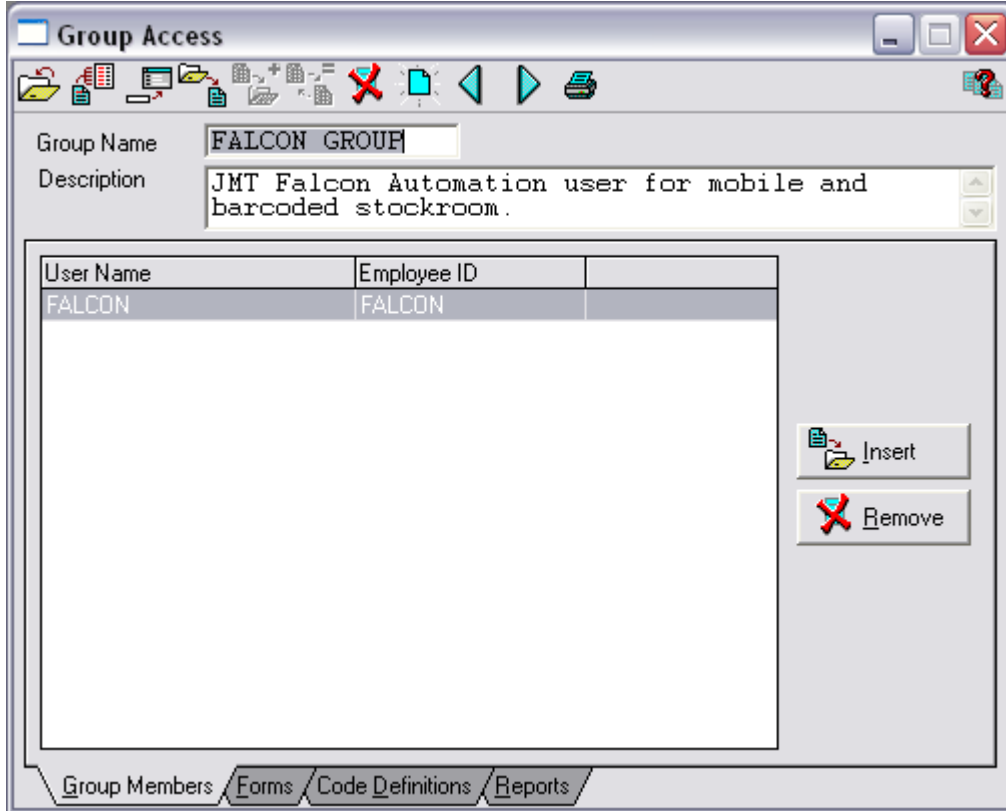


Figure 1 – Falcon group/user setup

For Advanced Inventory customers:

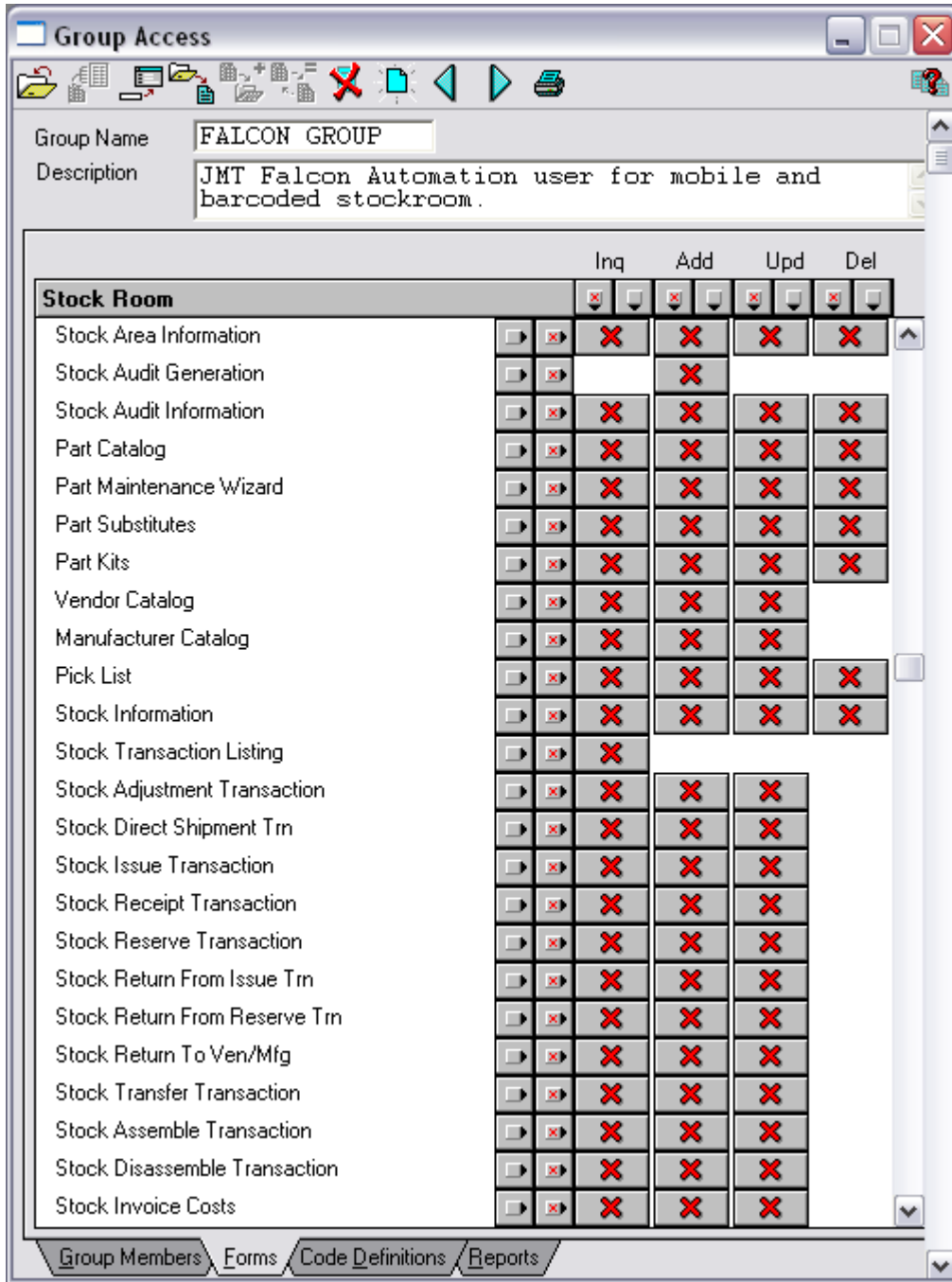


Figure 2 – Advanced Inventory -Stockroom rights

Advanced Inventory customers: All items under Stock Room must have Inq, Add, Upd, and Del marked.

	Inq	Add	Upd	Del
Customer Service				
Customer Service WD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service Request A/P	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Allow Future Serv Req Dates	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock Room				
Stock Area Information	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Part Catalog	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Part Maintenance Wizard	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Part Substitutes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vendor Catalog	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Manufacturer Catalog	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Information	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Transaction Listing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Stock Adjustment Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Issue Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Receipt Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Reserve Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Return From Issue Trn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Return From Reserve Trn	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Return To Ven/Mfg	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Stock Transfer Transaction	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stock Invoice Costs	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Resources				
<input type="checkbox"/> Group Members <input type="checkbox"/> Forms <input type="checkbox"/> Code Definitions <input type="checkbox"/> Reports				

Figure 3 – Basic Inventory -Stockroom rights

Basic Inventory customers:

All items under Stock Room must have Inq, Add, Upd, and Del marked EXCEPT the Part Catalog and Stock Information.

To set these Stock Room settings,

First enable all privileges for every Stock Room component (red X in every item), then

For the Stock Information item, turn off Add and Del by clicking the red X. Click the Upd to turn it to a green X, then

For the Part Catalog item, click to turn off Add, Upd and Del privileges.

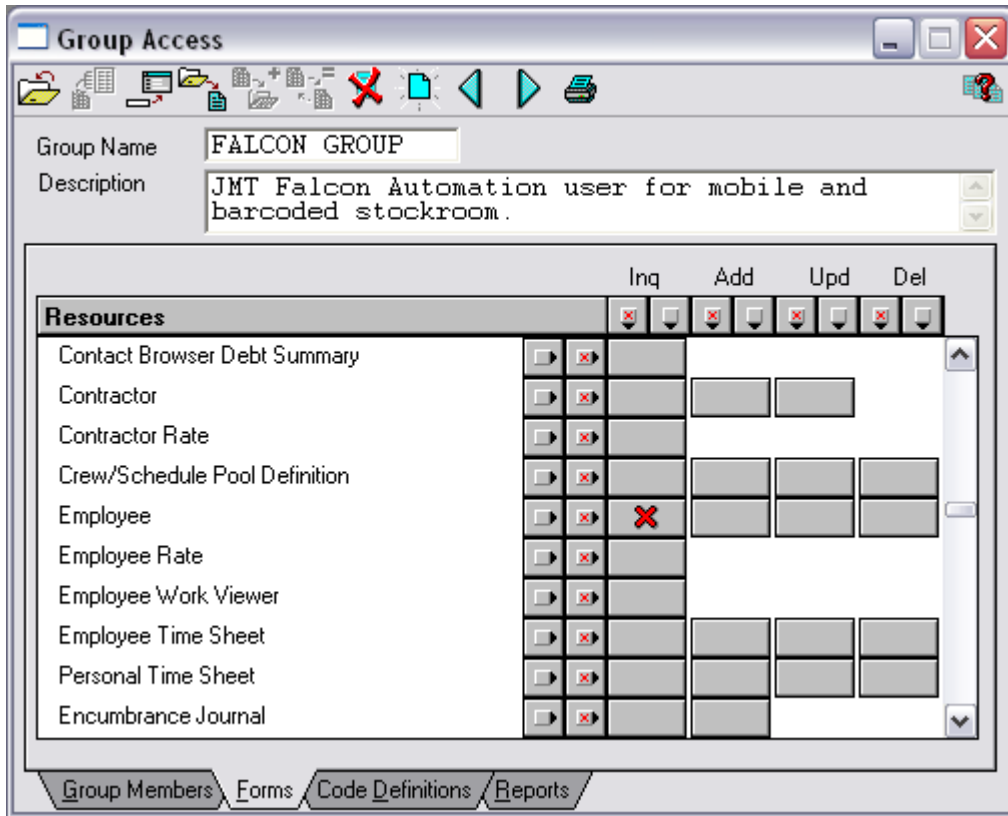


Figure 4 – Resources - Employee rights
Employee under Resources must have Inq marked.

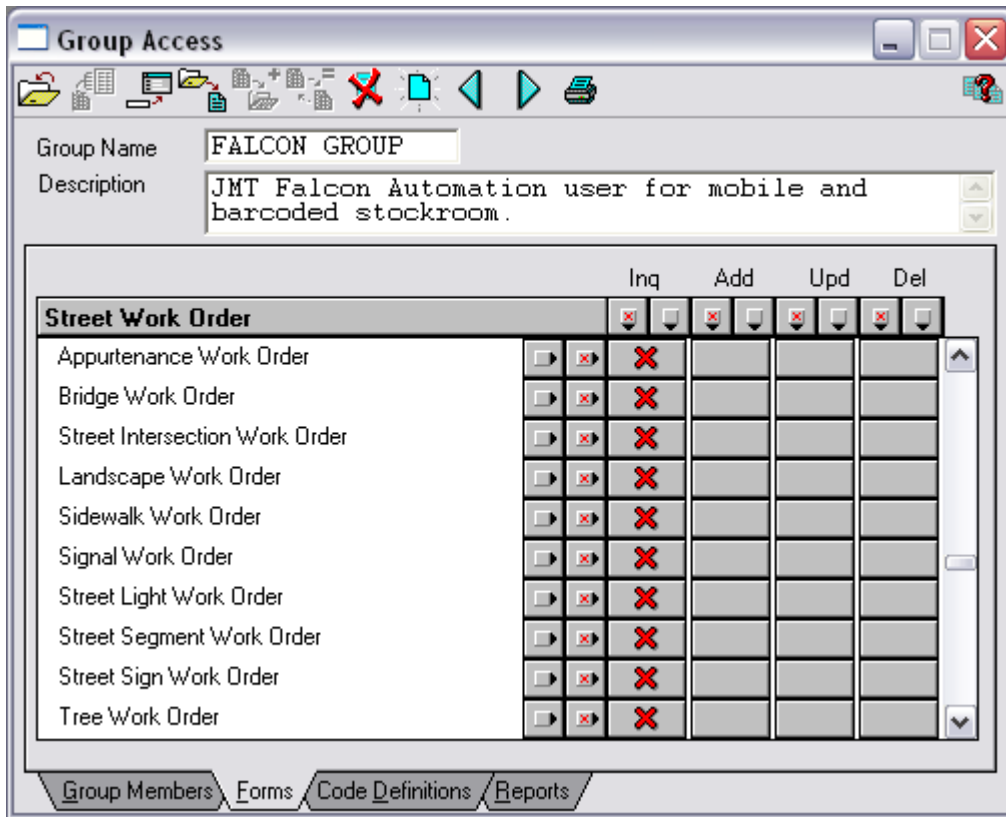


Figure 5 – Work order rights
All groups ending with “Work Order” must have Inq marked.

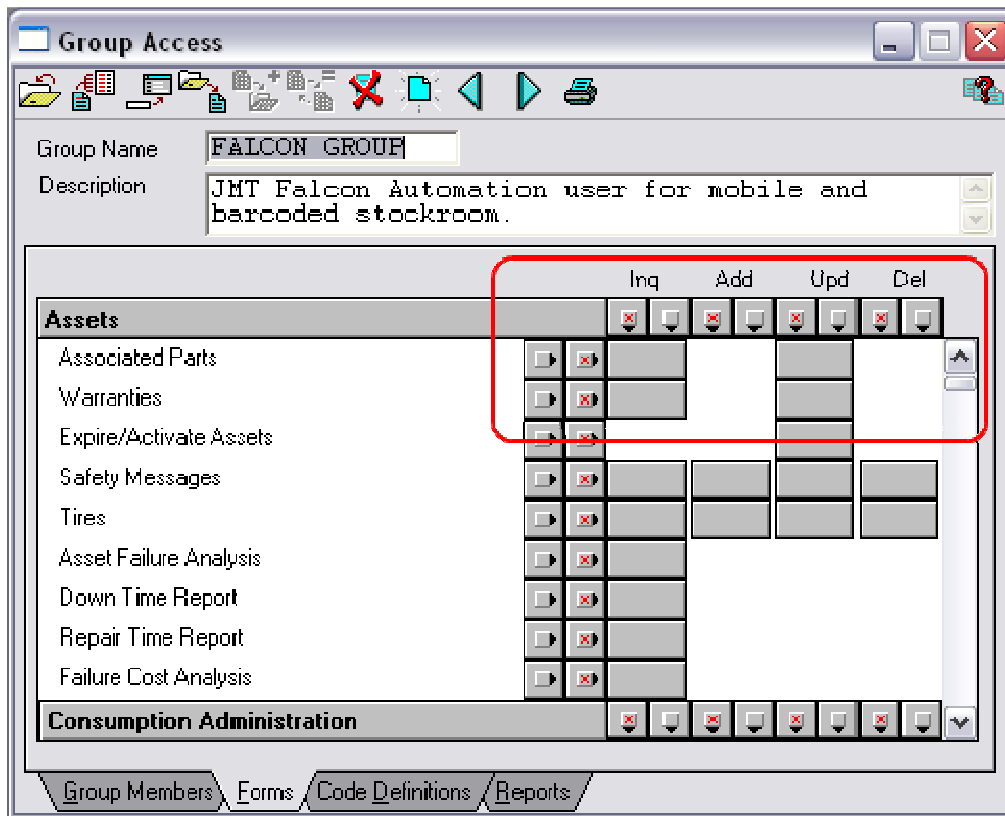


Figure 6 – Associated Parts rights
Associated Parts under Assets must have Inq and Upd blank.

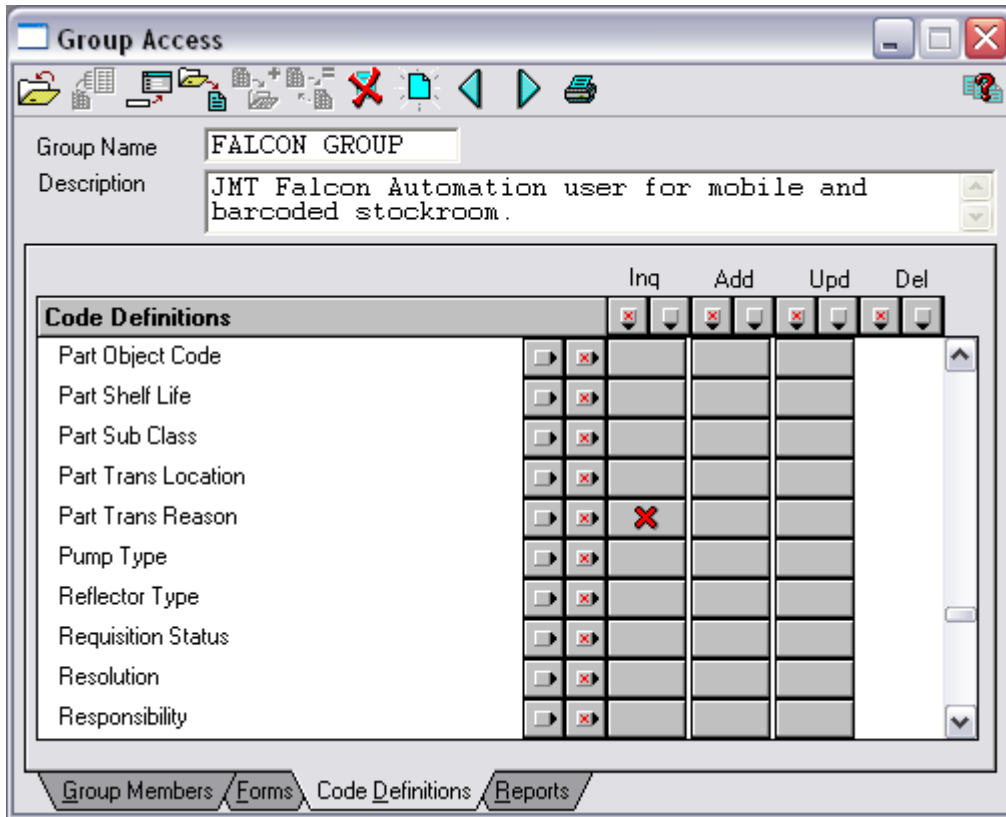
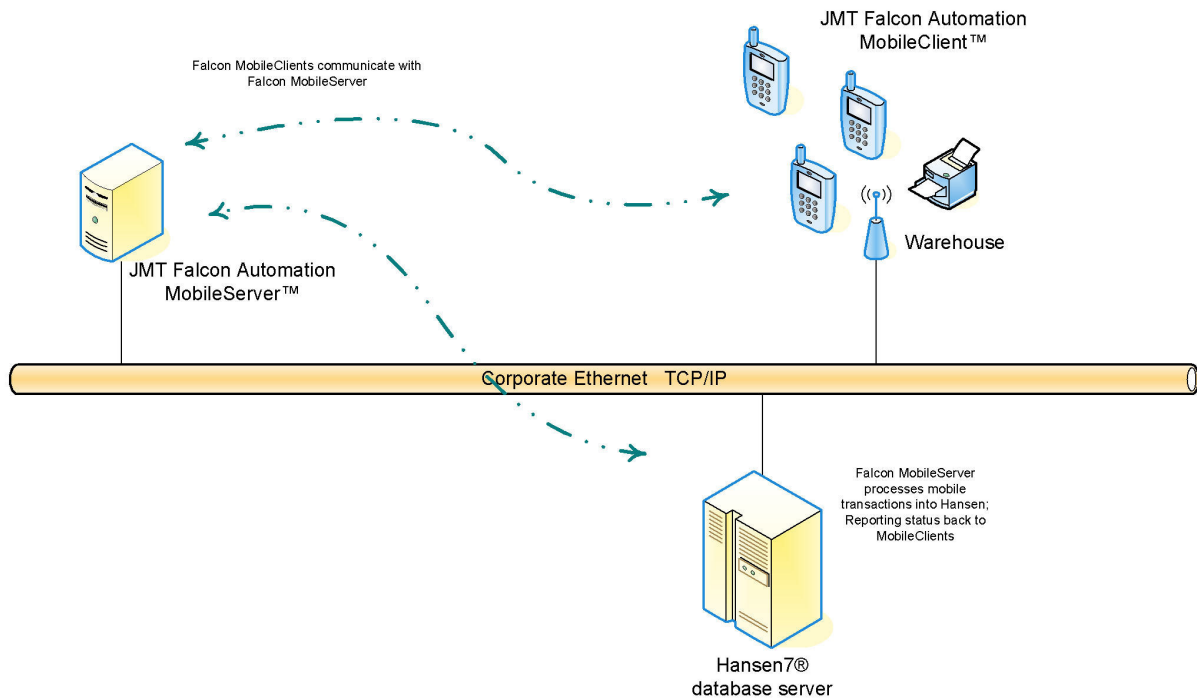


Figure 7 – Part Transactions Reason rights

Part Tans Reason under Code Definitions must have Inq marked

Appendix 2

Single Warehouse configuration pictorial:



Appendix 3

Multi Warehouse configuration pictorial:

