

Creating, Releasing, and Assigning Count Tasks

This documentation explains how to create zone/aisle combination count requests two different ways:

- [Create Count Request](#) (One count request for an entire aisle)
- [Create Count Requests for Location Group](#) (One count request for each location/cache item in an aisle).

Please see **ICBS-R Physical Count 1.27.2010** document posted under the training link on the Interagency Cache Business System (ICBS) link at <http://famit.nwcg.gov/> to determine which count request method most benefits your facility.

To ensure separation of duties as outlined in the NISC SOP the person(s) responsible for creating count requests cannot complete any count tasks and should be a user with a Cache System Admin permission role.

To Create a Count Request (for an entire aisle):

1. Login to the console
2. At **Main Menu**, expand the Inventory menu and click **Create Count Request**. The **Create Count Request** screen appears.
3. Select **Physical Count** from the **Request Type** drop-down list.
4. Enter the **Zone** you want to count. (**STOR1** for example)
5. Enter the **Aisle Number** you want to count. (**11** for example)
6. Click **Create Count Request** to create the count request. The screen refreshes and shows that the count request has been created. The status displays **Count Request Created** when the count request is created and displays the count request number.

To Create Count Requests for Location Group (for each location/cache item in an aisle):

1. Login to the console.
2. At **Main Menu**, expand the Inventory menu and click **Create Count Requests for Location Group**. The **Create Count Request for Location Group** screen appears.
3. Click **By Aisle/Bay/Level**.
4. Enter the **Zone** you want to count. (**STOR1** for example)
5. Enter **Aisle Number** you want to count. (**11** for example). Or you can click on **Get Number of Locations in Range** to show how many locations the request is for. This is a good way to verify what you entered.

6. Click **Create Count Request**. The screen refreshes displays a greyed out message the reads “The Count Request is being processed..., Check Count Console.”

To Assign and Release Count Tasks:

This section explains how to release a count task(s), which is the function of assigning and releasing the task(s) to a user to be completed using a scan gun. Please refer to **Section 5 ‘Manage Count Tasks’** in the ICBS-R Physical Count document, posted on the ICBS Training website.

When a 1st/2nd/3rd count tasks are created, they are automatically put in a **‘held’** status. The following are the steps to release and assign count task(s) to a user. Once a count request has moved to **‘2nd Count Tasks Created’** or **‘3rd Count Tasks Created,’** the count tasks are now available to assign.

1. Select **Task** from **Main Menu** and click **Task Console**. The **Task Console** screen appears.
2. Click the drop-down arrow next to **By Reference** and change the setting to **By Zone**, located in upper right hand corner of task console.
3. Select **Count** from **Activity Group** drop-down list.
4. Select **Physical Count RF Based-1st Count** from **Task Type** drop-down list.
5. Select **Held** from the **Task Status** drop-down list.
6. Click **Detail Tasks** and select **contains** from the drop-down list in the **Source Location** field.
7. Enter the start of location up to the aisle number. (**STOR1-10**)
8. Increase **Max Records** to 300. During the physical count you can return up to 600 records at a time.
9. Click **Search**. The Task List screen appears.
10. Click **Task ID box** to select all tasks.
11. Click the **Assign To User** icon.
12. Enter or search for the user name and enter it into **Assign To**.
13. Click OK. The users name is now under **Assigned to User** field on the Task List screen. The user is returned to the **Task List** screen and this releases the tasks to assigned user.
14. Click in the **Task ID** box to select all tasks.
15. Click the chevron’s (>>) located next to **Hold**.
16. Click **Release**. This releases all tasks at one time.

When the assigned user is done with a count task, the physical count coordinator can check the status of the count request. Refer to section 7 **‘View Count**

Request Progress' in the **ICBS-R Physical Count** document posted on the ICBS Training website for instructions on viewing details and status of a count request.