CookScan 4

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Contents

Introduction

The CookScan app for iPhone will allow you to manage field-based inventories more effectively, quickly, and accurately than previous methods. This user guide provides step-by-step instructions for using the app, so that you can spend less time managing your inventory, meet deadlines to complete audits, and spend more time developing relationships with your customers.

Types of audits

There are four types of audits that you can perform with CookScan:

Rep Stock
Rep stock products are products that a rep has on hand to deliver to customers. A rep stock audit reconciles the rep's inventory with the SSC's records.

Emergency Rep Stock (ERS)
Emergency-rep-stock products have been shipped to a Cook-approved emergency stocking center to be used for supplying product directly to a customer in an emergency.

Use or Return (UOR)
Use-or-return products are shipped to a customer to be used for a particular procedure that the customer does not yet have a purchase order for. After the procedure is complete, the rep performs the use-or-return audit to determine which products were used (and need to be billed for) and which products were not used (and need to be returned).
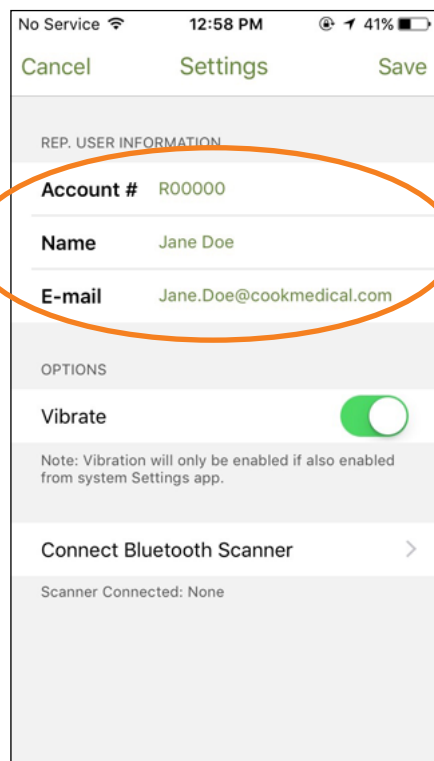
Consignment
Consignment products are products that are owned by Cook until the customer uses them. If a customer uses one of these items, they incur an obligation to pay for that item. Before a customer can keep consigned products on the shelf, they must sign an agreement with Cook that includes terms and conditions and that outlines the responsibilities and obligations of both parties. The goal of the consignment audit process is to make sure that the customer has a full inventory of their consigned items. If the customer terminates the consignment, they are responsible for returning all the items in the agreement and will be billed for any missing items.

(AMER only) If a customer uses an item from the consignment inventory, they must place a replenishment order to replace that item, and they will be billed for that used item.

Installing and setting up the CookScan app

All Cook apps can be found and installed using **Apps@Work**. If you don't have Apps@Work on your device, contact IT support or go to apphelp.cookmedical.com and search for MobileIron.

1. To Install CookScan, open Apps@Work from your device's Home screen.

2. Tap **Cook Apps**, and then tap **CookScan** > **Install**.

3. Find CookScan on your Home screen and tap it to open it.

4. CookScan will open and prompt you to enter your rep account number and your first and last name.

5. After you enter your account number and name, tap the **E-mail** field. Your email address should populate automatically, but make sure it is correct.

6. You're done! Now you can pair your Bluetooth scanner with your device, if you haven't already.

CookScan will open and prompt you to enter your rep account number and your first and last name. Your email address should populate automatically, but make sure it is correct.

Setting up your Bluetooth scanner

The most efficient way to scan products is with your Bluetooth scanner, but you will first need to pair the scanner with your device.

Note: You must follow these instructions exactly in order for your scanner to function correctly with your device. If you have problems and need to start over, please see the instructions at the end of this section to reset both the scanner and your device.

Important: Do **not** just use the Bluetooth menu in your device settings to connect your scanner. You must first go into the CookScan app and scan the square barcode from the Help section before you pair the scanner with your device, or the scanner will not pair correctly with the device.

Before you begin, you should check the following settings:

- Go into Control Center or **Settings** > **Display & Brightness** and make sure that the screen brightness is set to maximum. Also make sure that your device screen is clean.

- Go into **Settings** > **Bluetooth** and verify that Bluetooth is toggled on.

- (Optional) If you have trouble with your device going to sleep while you're in the middle of scanning, go to **Settings** > **General** > **Auto-Lock**, and set the time for 15 minutes.

1. Open the CookScan app.
   Note: The first time that you open CookScan you will be prompted enter your rep account number and your first and last name, and to confirm that your email address is correct. You can also set your vibration preference. If you have already completed this setup, simply continue to step 2.

2. Within CookScan, go to **Settings** > **Connect Bluetooth Scanner**.

3. Choose **Save** or **Discard** in the Save Changes pop-up that appears.

4. On the Bluetooth Scanner Help screen, scroll down until you see the square barcode.

5. Turn on your scanner. The scanner has two buttons: the smaller, circular button is for power, and the large, oval button is for scanning. Press the power button for about one second. The scanner should beep, and the power indicator should blink blue.

6. Within a few seconds, the scanner will be ready to scan. Scan the square barcode on your device screen. You may need to vary the distance and angle between the scanner and the device (start by holding the scanner straight on at a distance of 6-8 inches from the screen). The scanner will beep when the scan is successful.
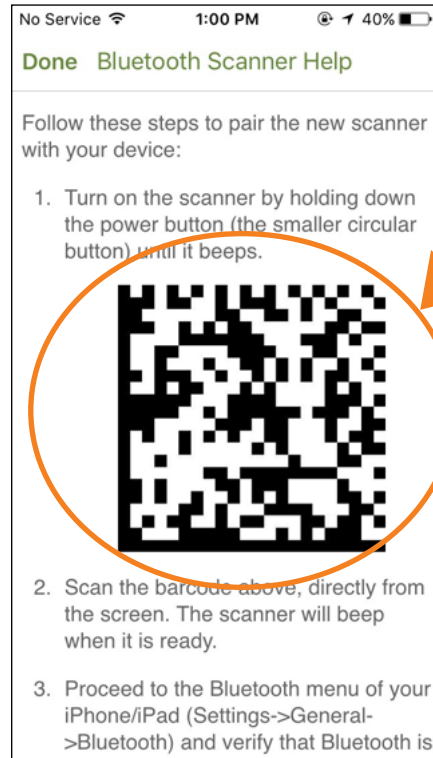

Scroll down until you see the square barcode.

7. Tap **Done** to return to the CookScan Settings screen.

8. Now return to your device's **Settings** > **Bluetooth** menu.

9. Find the scanner name (it will look something like **iOS Socket 7Xi [xxxxx])** in the Devices list, and tap it.

10. After a few moments, the scanner name should appear in the My Devices list, and the status should say Connected.

11. Return to Settings in the CookScan app. The scanner will beep, and you should see Scanner Connected under **Connect Bluetooth Scanner**.

Tap the scanner name.
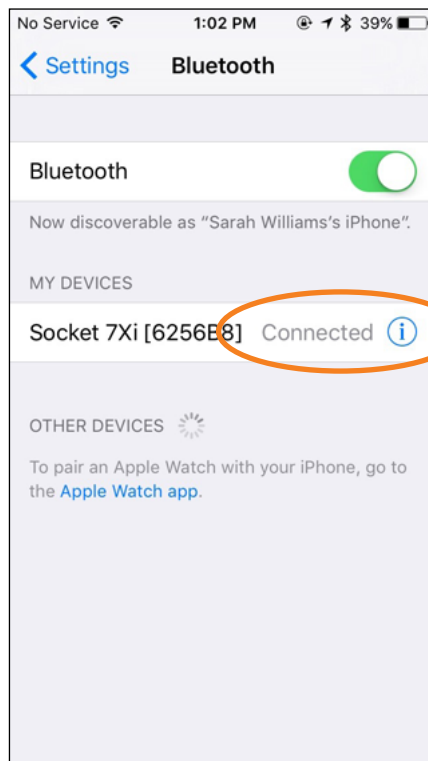
The status should say Connected.
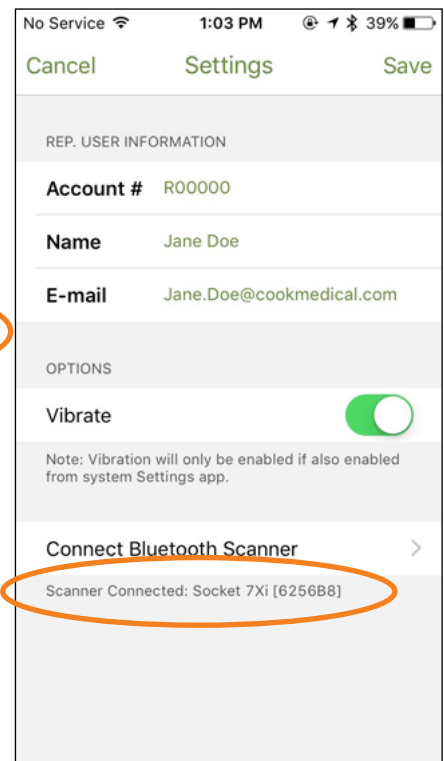
You should also see Scanner Connected under **Connect Bluetooth Scanner** when you return to Settings in the CookScan app.

Connecting the scanner to a new iPhone (or other device) and other connection issues

Like any other Bluetooth device, the scanner uniquely remembers which device it is paired with. Unlike other Bluetooth devices, however, once paired, the scanner won't pair with any other device. This is ideal so that if you have many scanners operating in the same area they will maintain their unique connection to the correct device. If you need to pair your scanner with a new device (or with a different device, such as your iPad) the scanner needs to "forget" the device that it is currently paired with.

If you need to pair the scanner with a new device or if you are having connection issues, try the following steps:

"Forgetting" and reconnecting the scanner

1. Go to the Bluetooth menu of your device (**Settings** > **Bluetooth**), verify that Bluetooth is on, tap the information icon next to iOS Socket 7Xi[…], and then tap **Forget this Device**.

2. Return to **Setting up your Bluetooth scanner**, above, and complete steps 8-11.

If you are still having connection issues, follow these steps:

Resetting and reconnecting the scanner

1. Press and hold the power button on the scanner for about one second to turn on the scanner. The scanner will beep to confirm that the power is on, and the power indicator should blink blue.

2. Press and hold the scan button while performing the next two next steps.
   a. While pressing the scan button, quickly press and release the power button; if the device turns off, turn it back on and start again.
   b. Continue to press the scan button for about 15 seconds, until the device beeps.

3. Release the scan button. You should hear five descending tones, and the device will power off. The scanner is now reset to factory specifications.

4. Go to the Bluetooth menu of your device (**Settings** > **Bluetooth**), verify that Bluetooth is on, tap the information icon next to iOS Socket 7Xi[…], and then tap **Forget this Device**.

5. Return to **Setting up your Bluetooth scanner**, above, and begin the process again.

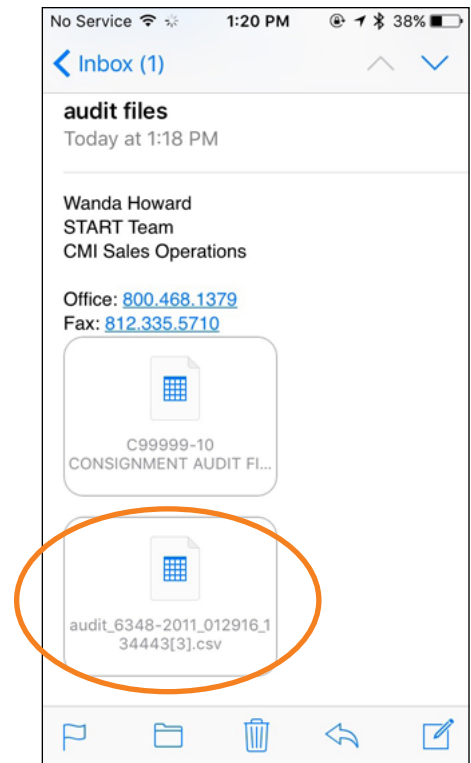**Note:** You can find more information about your scanner in the **Socket Mobile user guide**.

Importing inventory audit files

Periodically, the SSC will send you an email request to complete an audit. Follow these steps to import the audit file into CookScan.

1. Scroll down to the bottom of the email, where you will see a .csv file attachment.

2. Tap the file name to open a preview of the file, and then tap anywhere on the screen to display the toolbar.

3. Tap the **Share** icon, and then tap **Copy to CookScan**.

4. CookScan will detect what type of audit file it is and then open and display the inventory list that you just imported into the Products screen for the correct audit type.

Note: If you received more than one .csv file, return to Mail and repeat these steps until you have imported all the files into CookScan.

Note: Do not use any program other than CookScan to open a .csv audit file. If you open or try to edit a .csv audit file outside of the CookScan app, your audit will be rejected, and you will have to complete the audit process again.
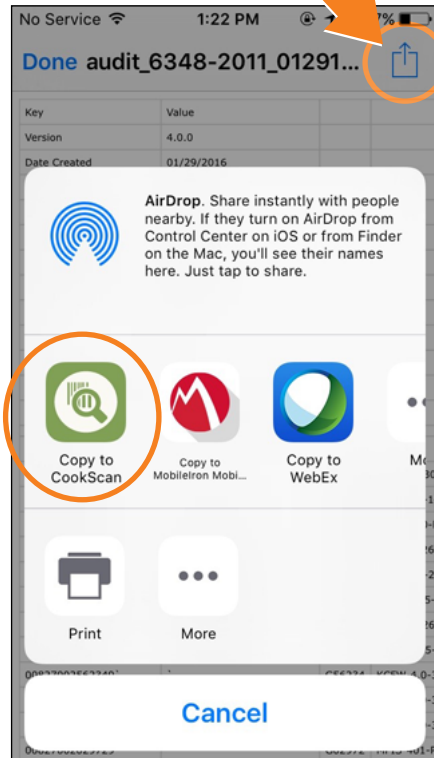

Tap the file name of the .csv file attachment.

After tapping the file name you will see a preview of the file. Tap anywhere on the screen to display the toolbar.

Tap the **Shar**e icon, and then tap **Copy to CookScan**.

CookScan will detect what type of audit file it is and will open and display the inventory list that you just imported.

Data entry methods (scanner, device camera, manual entry)

Many Cook packages have two types of barcode, a short one and a long one. There may be multiple copies of the long barcode on stickers. Always scan one of these long barcodes. If you scan the short one, CookScan will reject it.

You do not need to scan products in any particular order. As you scan items, the app will automatically display the item in the product list that matches the scanned item.

Note: When you scan products for the audit, the GPN, GTIN, lot number, and quantity of each item must match the audit file exactly. The only exception is for consignment audits in AMER, for which the lot number may be different.

Scanning your inventory with the Bluetooth scanner

Before you use your Bluetooth scanner, be sure that it is paired with your device (see **Setting up your Bluetooth scanner**, above). To use the scanner, simply press the large, oval, scan button and position the red aiming beam over the barcode. The scanner will beep, flash a green LED, and vibrate to confirm that the scan was successful.

Note: You may need to vary the distance and angle between the scanner and the barcode.

Note: If your scanner's battery has less than 20% charge remaining, the LED will blink red instead of green.
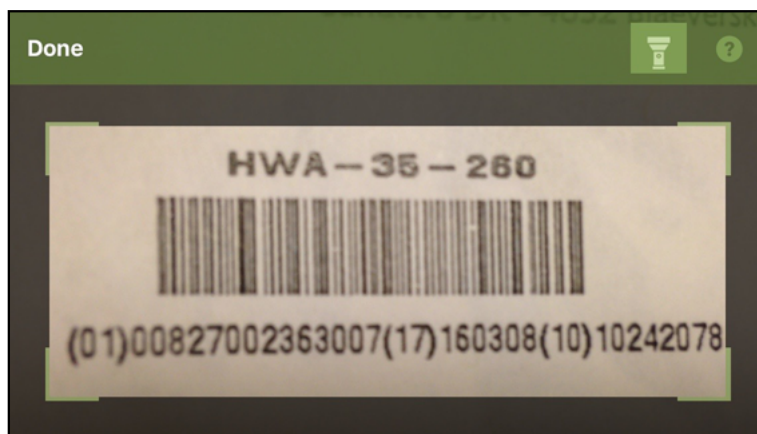
Scanning with your device camera.

Scanning your inventory with your iPhone/iPad camera

To activate the camera, make sure that you are in the Products screen, and then tap the **Camera** icon in the bottom toolbar.

Hold the camera over the barcode, making sure to center the barcode on the screen. Once the device is in the correct location, the camera will automatically read the barcode, and CookScan will display a message to let you know that the scan was successful. Press **Done** after you are finished using the camera to scan products.

Please keep the following tips in mind if you are using your device camera to read barcodes:

Make sure that the lens is clean. A dirty lens will make the barcode image look cloudy on-screen. You may need to remove your device case and wipe the lens with a cloth.

Make sure that the barcode is well lit. Without enough light, the camera won't be able to focus and capture the barcode information. If you are in a dimly lit area, you can turn on more lights, move the products to a more brightly lit area, or use the device's built-in light. To use the built-in light, simply tap the **Light** icon. Just beware of creating a glare in the barcode image.

Check the distance. Hold your device about 6-8 inches from the barcode and use the green box on the interface to guide you. Try to get good focus while keeping the barcode at a reasonable size, and keep the camera steady.

Manual product entry

If the barcode is missing or damaged, you can enter the GTIN, lot number, and expiration date manually.

To enter data manually, tap the **Keyboard** icon on the bottom toolbar. On the product-entry screen, follow the prompts to enter the required information.

The product-entry screen.

Completing audit files in CookScan

1. When you import an audit file and select **Copy to CookScan**, the app will automatically open the file, ready for scanning. If you need to open a list that you previously downloaded, open the CookScan app, select the appropriate audit type from the main menu, and then tap the name of the file. The list will open in the Products screen, where you will see a list of all the products you need to scan, along with the quantity expected for each item.
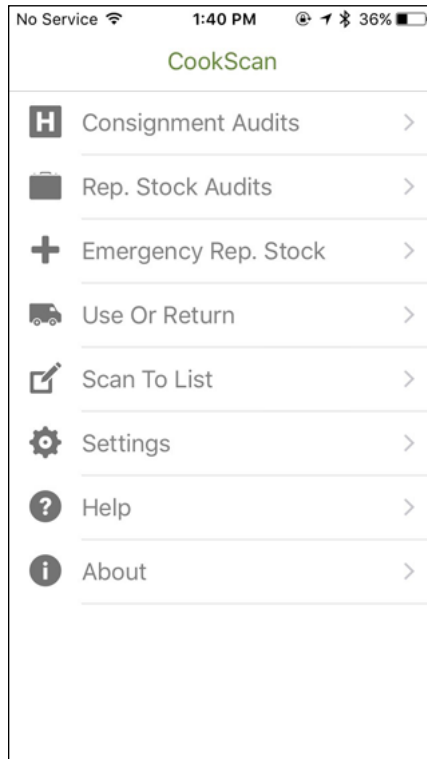
2. Scan the products shown in the list (using either the scanner or camera, or by manual entry). When you scan a product successfully, the red X icon will turn into a green check mark. If you mark a product as missing (see **Marking an item as missing**, below), the red X will turn into a yellow triangle.
   **Note:** If you are required to scan more than one of a product, the green check mark will not appear unless you have scanned the total quantity expected.

Select the appropriate audit type from the main menu.   Tap the name of the file.

3. After all items are accounted for (either scanned or marked as missing), the app will prompt you to send the completed audit file to the SSC, where the results will be reviewed and reconciled.

Note: The app will not allow you to email the audit file back to the SSC until all products in the list are either scanned or marked as missing. No red X icons may remain.
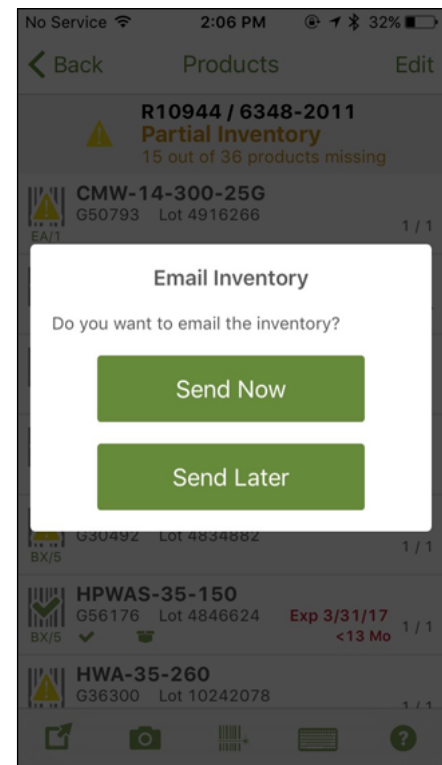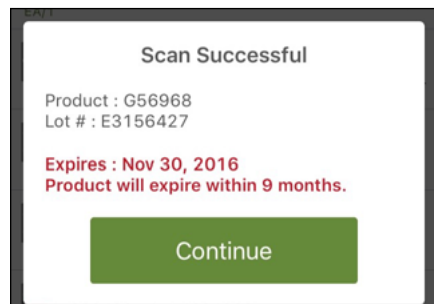
The app will prompt you to send the completed audit file.

On-screen messages

As you scan products, CookScan will provide feedback. When you successfully scan a product, your device will vibrate (and make a "happy" sound, unless it is in silent mode) and provide an on-screen message.


Scan successful – The Scan Successful message displays the product number, lot number, and expiration date for the product you scanned. You may also see a warning in red that the product expires within a certain number of months.
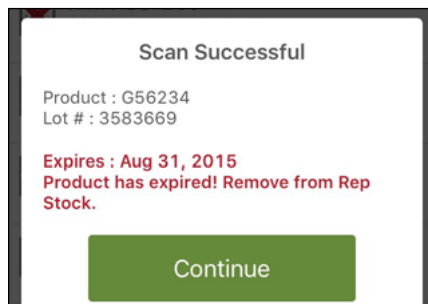
Product is expired – This message warns you that the product has expired and that you should remove it from inventory.
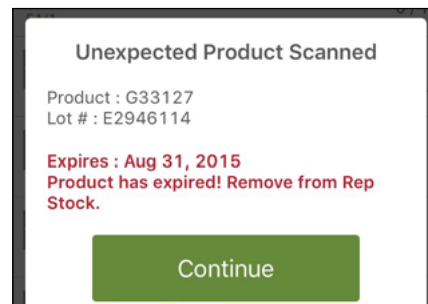
Unexpected product – This message appears if you scan an item that's not on the inventory list that you received from the SSC.
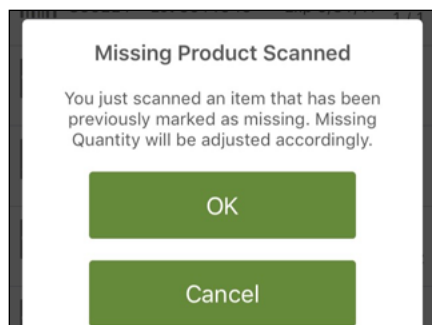
Missing product scanned – If you scan a product that you previously marked as missing, you will see a message to let you know that CookScan will adjust the quantity automatically.
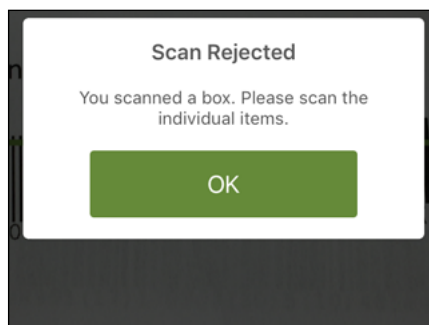
Scan rejected (Rep Stock, ERS, and UOR only) – If you scan a box when the audit requires you to scan each item individually, CookScan will reject the scan and ask you to scan the individual items.
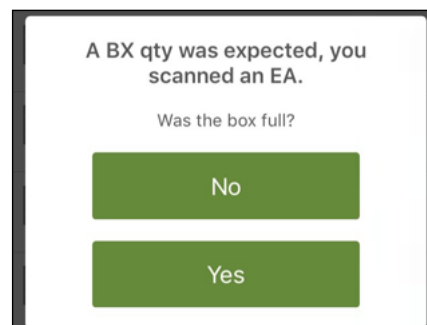
Box quantity (Rep Stock, ERS, and UOR only) – If you scan an individual item when the audit is asking for a box, CookScan will ask whether the box was full. (Consignment only) - If you scan the box barcode for a product that is packaged in a box that has more than one product in it, you'll see a message that asks whether the box is full.

Marking an item as missing

You can mark an item as missing either when you cannot find any of an item (you are missing the entire quantity) or when only a few of the expected total are missing.

Note: If you are missing only a partial quantity (for example, the audit asks for five of an item, but you have only two), first scan the products that you do have, and then mark the rest as missing.

For rep-stock, emergency-rep-stock, and use-or-return audits

1. To mark an item as missing, tap the item on the Products screen, and then tap the item under **Unscanned Items**.

2. Tap the **Explain Missing Quantity** field, and then type or dictate a note to explain why the item is missing.
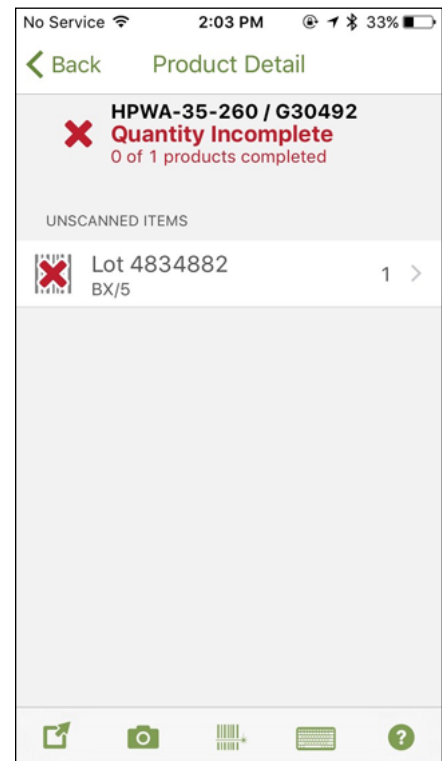
3. Tap **Save**.

For consignment audits

1. To mark an item as missing, tap the item on the Products screen, and then tap the item under **Unscanned Items**.

2. Tap **Please advise status as appropriate**, and then type or dictate a note to explain why the item is missing or to indicate that the customer intends to reorder the product.
**Note (AMER only)**: You can also tap **Remove** to indicate that the customer wants to remove the product from their consignment. After you tap **Remove**, verify that the number in the **Quantity to Remove** field is correct.

3. Tap **Save**.

Note (AMER only): If you indicate that a customer would like to remove a product, that product is not automatically removed from the consignment. When you select **Remove**, you are marking the file to remind you and your customer about what action you need to take for the missing item, and you are instructing the SSC to document the change.

To mark an item as missing, tap the item on the Products screen, and then tap the item under **Unscanned Items**.
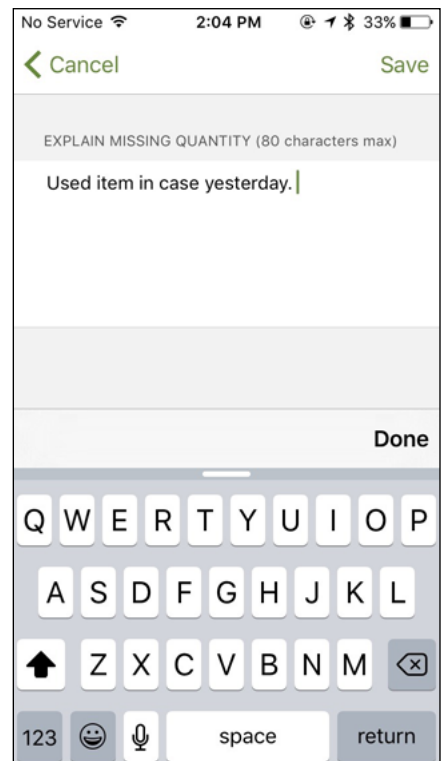
Type or dictate a note to explain why the item is missing.

Handling extra products

If you scan an item that is not on your inventory list, CookScan will alert you that the product was unexpected and will add the item to the list and mark it with a question mark. If the inventory list is for a consignment audit, you will need to add a note to indicate where you think the extra product came from or why you scanned it.

Note (AMER only): Do not scan items for a consignment audit that are not on your inventory list unless you have consulted with SSC personnel first.

To add a note, tap the item, tap it again in the Product Detail screen, and then add a note to the **Explain Extra Quantity** field. Tap **Save** when you're done.

If you accidentally scanned the extra item, swipe left on the item, and then tap **Reset**.
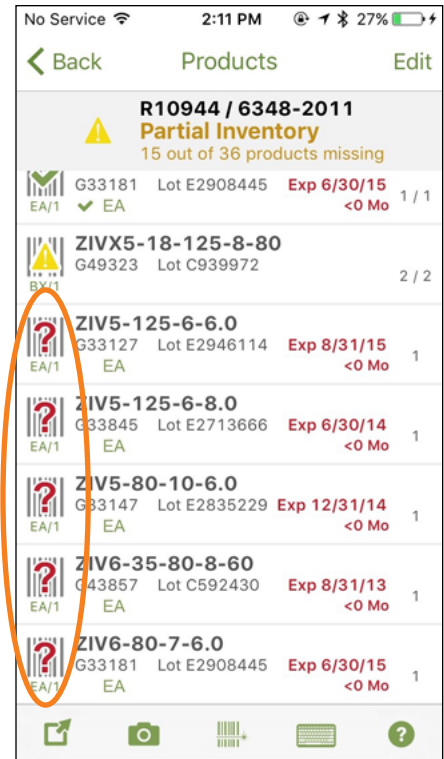
CookScan will mark unexpected products with a question mark.

Resetting a list item (or an entire list)

If you want to reset an item, swipe the product to the left, tap **Reset**, and then tap anywhere else on the screen.

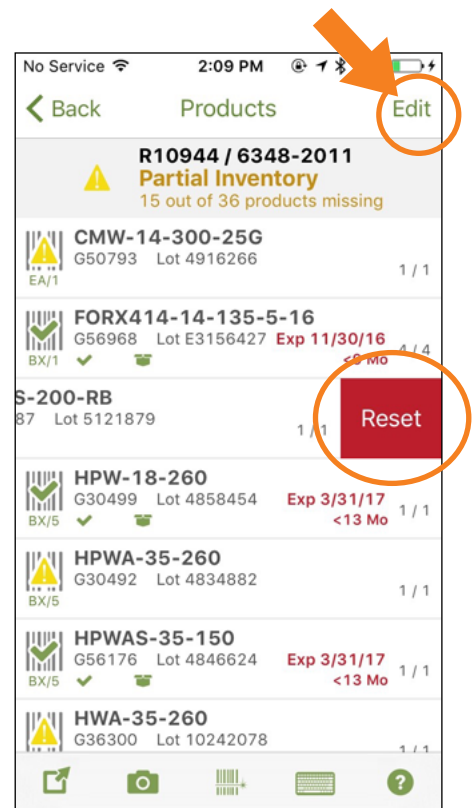To reset an entire list, from the Products screen tap **Edit** > **Reset** > **Reset All**.

Deleting an inventory list

If you want to delete an inventory list , tap the relevant inventory type on the CookScan Home screen, and then tap **Edit**. Tap the **Delete** icon next to the list that you want to delete, and then tap **Delete**.

Storage carts (AMER only)

You may have a storage cart on your consignment list. There is no barcode to scan. You simply need to indicate that you found it.

1. First tap **Storage Cart**.

2. Tap the **Plus** icon once to indicate that you found one cart. CookScan will now mark the quantity as complete.

3. Tap **Back** to return to the Products screen.

Swipe left on an item to reveal the **Reset** button. To reset an entire list, from the Products screen tap **Edit** > **Reset** > **Reset All.**
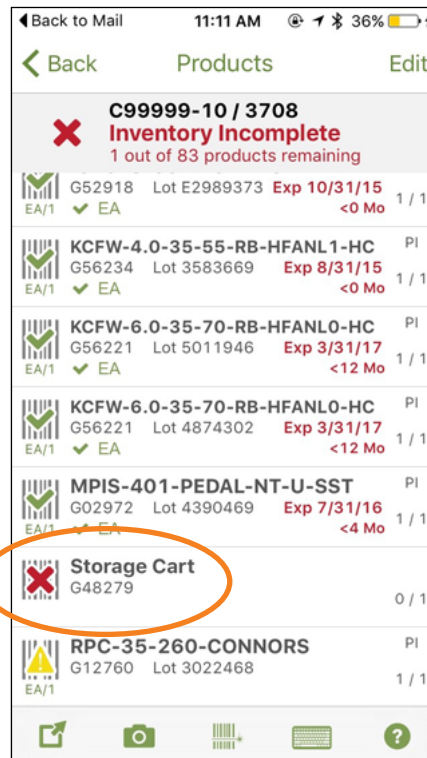
You may have a storage cart on your consignment list.
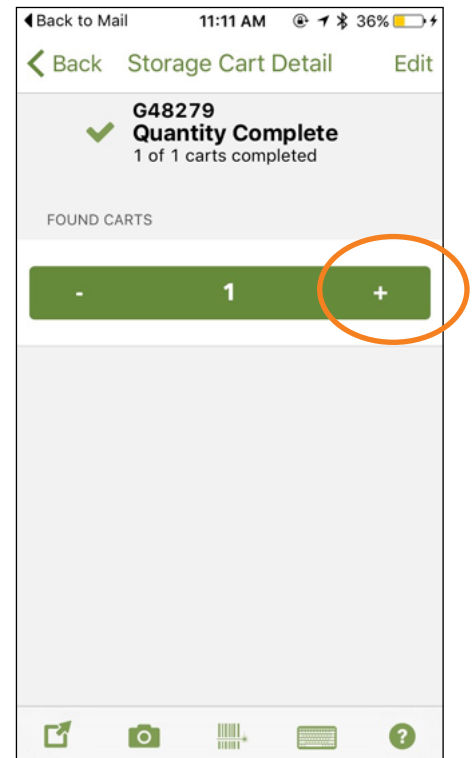
Tap the **Plus** icon once to indicate that you found one cart.

Submitting audit files to the SSC

When you are finished scanning your inventory, CookScan will ask whether you want to email the inventory list to the SSC. If you don't have Wi-Fi or a phone signal at that moment, you can send the file later.
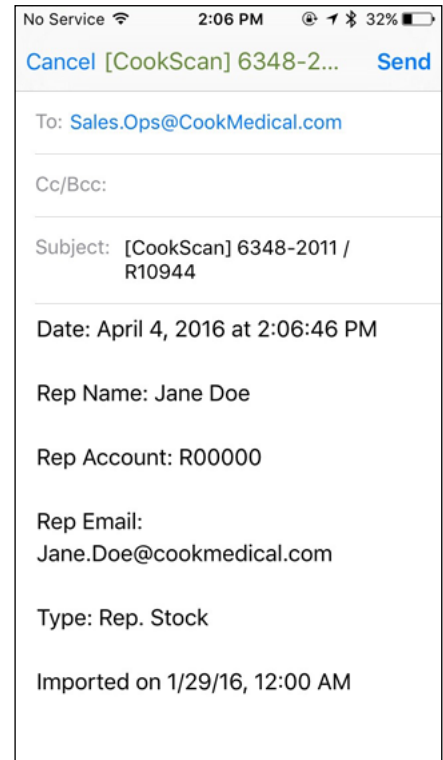
Sending the file now

1. Tap **Send Now**. If the audit is for a consignment agreement, CookScan will ask whether you want to terminate or continue the agreement.
   Note (consignment audits for EMEA only): You should almost always select **Continue**.
   Note (consignment audits for AMER only): If you select **Terminate**, the SSC will prepare the paperwork necessary to close the agreement.
   Note: If a customer wants to terminate the agreement, you do not need to mark each individual item for removal.

2. CookScan will generate an email with all the relevant information already filled out and attached. The **To** field should contain the correct Sales Ops email address for your region (AMER: sales.ops@cookmedical.com; EMEA: emea.salesops@cookmedical.com). Tap **Send**. Or if you decide that you want to send the email later, tap **Cancel** > **Save Draft** to save it to your drafts folder.
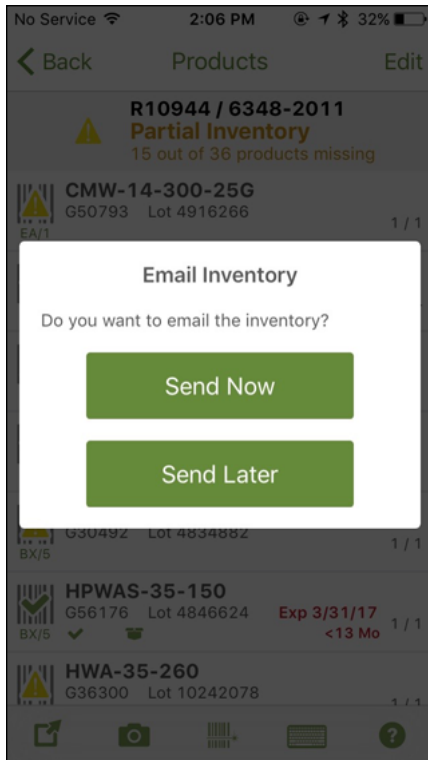
Tap **Send Now** if you are ready to send the file.
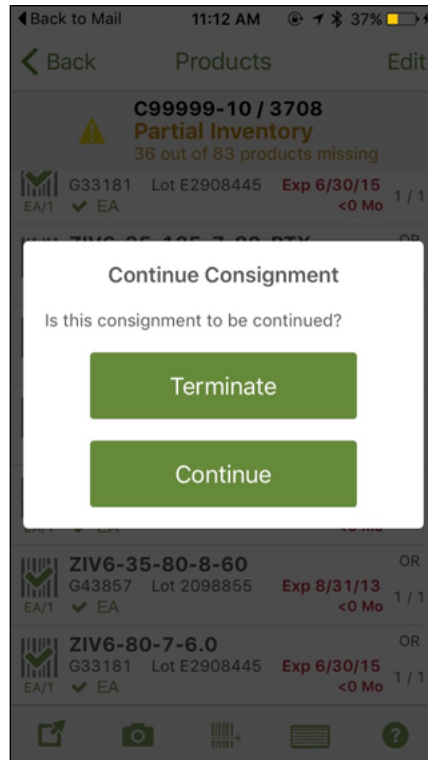
For consignment audits, you must select whether the customer wants to terminate or continue the agreement..

CookScan will generate an email with all the relevant information already filled out and attached.

Sending the file later

1. Make sure that you are in the Products screen for your inventory and then tap the **Share** icon at the bottom of the screen. CookScan will generate an email with all the relevant information already filled out and attached.
   Note: For consignment audits, you will need to tap **To SSC** after you tap the **Share** icon.

2. Tap **Send**.

Reminder: Do not use any program other than CookScan to edit an audit file before you submit it to the SSC. If you edit an audit file outside of the CookScan app, your audit will be rejected, and you will have to complete the audit again.

Sending a saved draft later

1. If you saved a draft of your email and are ready to send it now, open the Mail app.

2. If your mailboxes are not visible, tap the **Folder** icon in the top toolbar, and then tap **Drafts**.

3. Tap the email that you want to send.

4. Make sure that you have filled out all the correct information, and then tap **Send**.

Emailing consignment audit results to a customer

After you send the consignment audit results to the SSC, CookScan will ask whether you'd like to email the audit results to the customer.

Sending the file now

1. Tap **Send Now**.

2. CookScan will generate an email that contains a simple message explaining that the customer's inventory has been reviewed, as well as an easy-to-read list of the RPNs, GPNs, and quantities that are missing (if any). By default, the email is addressed to the rep (not to the customer). Replace your email address with the customer's email address, and then review the message and add any desired personalization.

3. Tap **Send**. Or if you decide that you want to send the email later, tap **Cancel** > **Save Draft** to save it to your drafts folder.
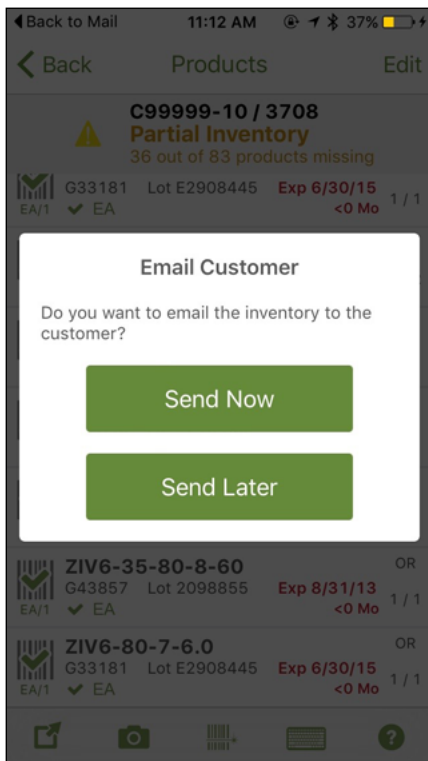
CookScan will ask whether you'd like to email the audit results to the customer.
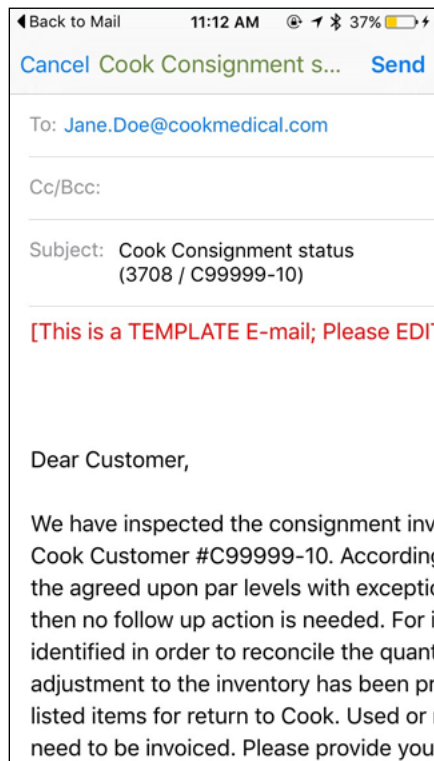
CookScan will generate an email that contains a simple message explaining that the customer's inventory has been reviewed.

Sending the file later

1. Make sure that you are in the Products screen for your inventory and then tap the **Share** icon at the bottom of the screen.

2. Tap **To Customer**. CookScan will generate an email with all the relevant information already filled out and attached. Replace your email address with the customer's email address, and then review the message and add any desired personalization.

3. Tap **Send**.

Sending a saved draft later

1. If you saved a draft of your email and are ready to send it now, open the Mail app.

2. If your mailboxes are not visible, tap the **Folder** icon in the top toolbar, and then tap **Drafts**.

3. Tap the email that you want to send.

4. Make sure that you have filled out all the correct information, and then tap **Send**.

Using the scan-to-list function

This function allows you to create a list of items by scanning barcodes, and then email that list to whomever you would like. The end result is the same as if you used paper and pencil to write down all of the items, but the process is a lot faster and more accurate.

Note: Do **not** use Scan to List as a substitute for inventory audits that you receive from the SSC.

The scan-to-list function can be useful for several things:

- To create a list of products to email to Return Goods to request an RGA that will enable you to return those products to Cook

- To create a list of products to order either for your rep stock or for a customer

- (EMEA only) To raise activity records

- To email a list of products for any reason other than inventory audits

To create and email a scan-to-list file:

1. From the CookScan main menu, tap **Scan To List**.

2. Tap **New List**.

3. Enter the customer or rep number and a short description for the list.

4. Tap **Save** (in the upper right corner of the screen).

5. To add items to your list, make sure that you are in the Products screen and then simply scan any items you want to add to the list. **Note:** CookScan will display a message when you successfully scan an item. If the product is expired, the message will instruct you to remove it.

6. To email a scan-to-list file, make sure that you are in the Products screen for the list that you created, and then tap the **Share** icon. CookScan will generate an email with the scan-to-list file attached. Simply add your email recipient and tap **Send**.
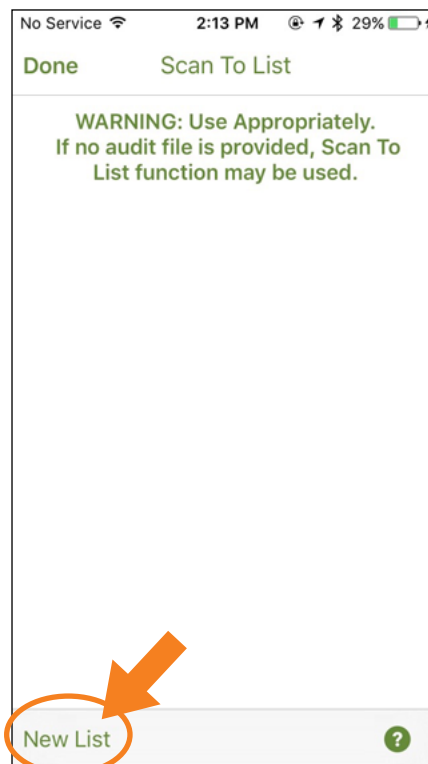
Tap **New List**.
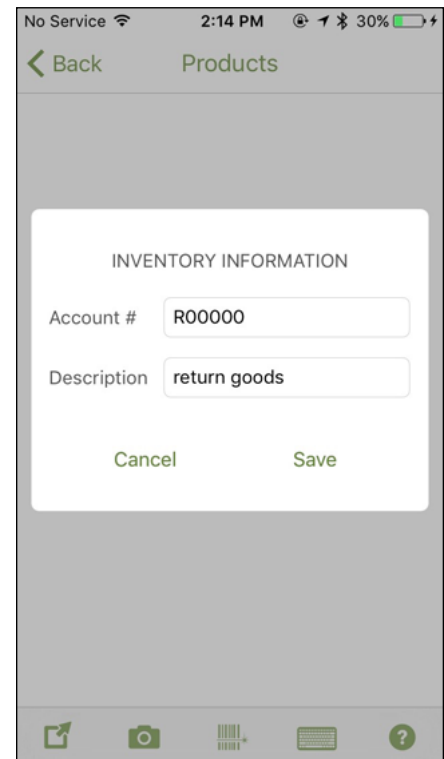
Enter the customer or rep number and a short description for the list.

If you need help

If you have questions about how to use CookScan or you encounter problems as you use the app, contact your local IT support team.

IT support contact information

Americas
it.support.nam@cookmedical.com
1.866.920.6508

Europe
it.support.emea@cookmedical.com
+353 6123 9477

CookScan help

CookScan has a built-in help system. Simply tap the **question mark** icon to access the relevant help topic for whichever screen you are currently in.