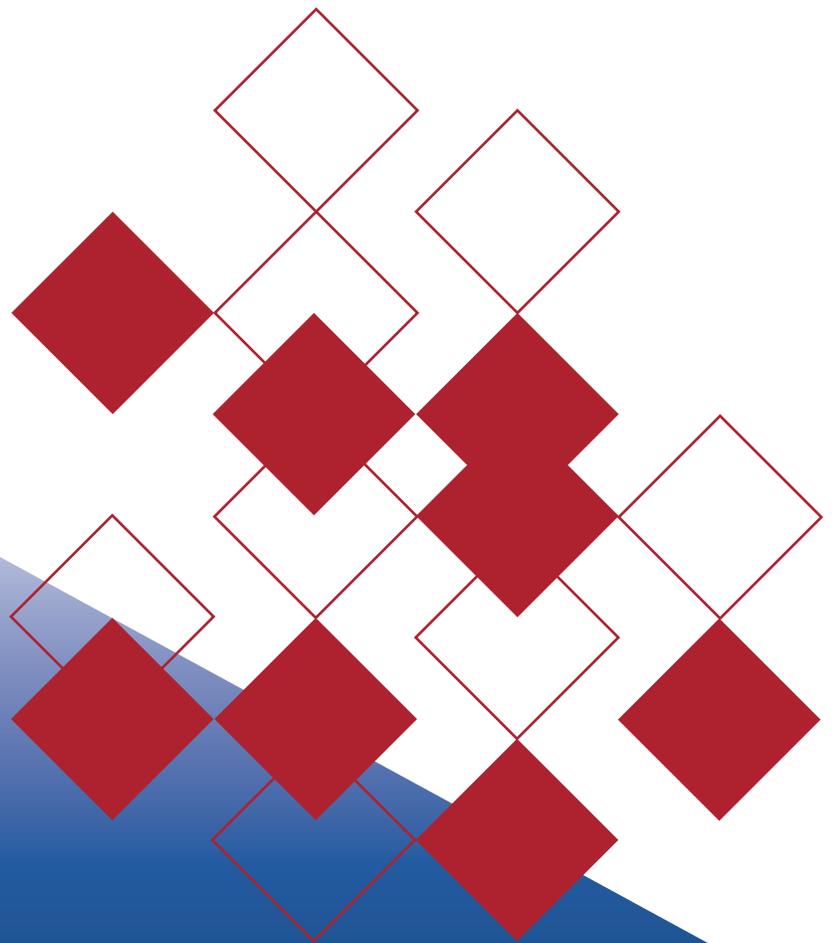




CRIBWARE

Evaluation Guide

Version 8.1.3.X



Applied CIM Technologies
I n c o r p o r a t e d

Welcome to the CRIBWARE System. This brief guide provides important information to help you get up and running as quickly as possible. Your CRIBWARE CD contains a fully functional CRIBWARE system with a sample or test database. You may edit the sample database to provide a more realistic experience.

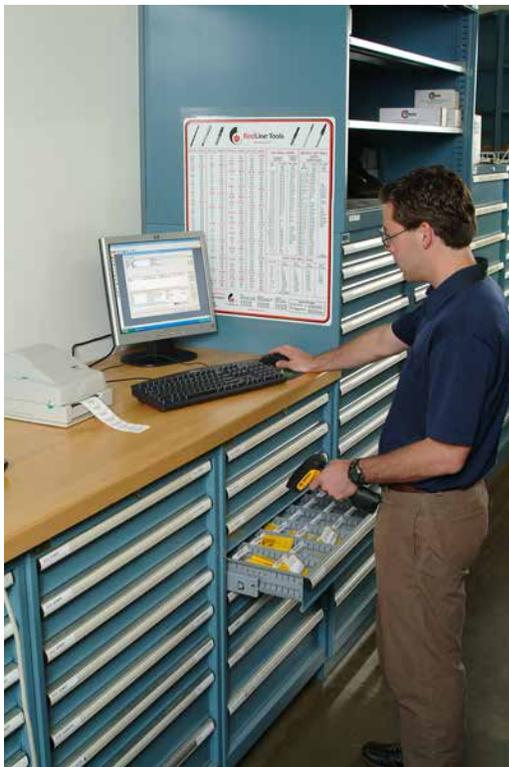


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Total Crib Control

The CRIBWARE® system is a powerful, yet easy to learn, easy to use, comprehensive crib management package. From a few hundred to thousands of items, this scalable, multi-user system provides the functionality and flexibility to efficiently streamline the usage tracking, inventory management and acquisition processes.

Key Features

- Item identification and classification
- Usage and cost tracking
- Multiple location/multiple bin inventory control
- Replenishment, purchasing and receiving
- New and used visibility
- Scrap and rework accountability
- Item issuing/returning
- Management reporting
- Electronic ordering



Why CRIBWARE...

Lowering "hard" costs such as inventory dollars and "soft" costs in administration and purchasing provides a quick return on investment.

Replenishment Notification

Notification when items are below their reorder point means not having to visually check the bins.

Cost Accountability

Usage and costs are tracked by employee, job, department, machine, or operation.

Automated Purchase Order Creation

Orders are automatically created and can be sent via e-mail or fax.

Optimal Inventory Levels

Min/max inventory control maintains inventory at the proper levels.

Total Location Control

An item is tracked to its current location.

Immediate Information Access

Real time access to all inventory, purchasing, receiving and tracking information.

Eliminate Stock Outs

No more expediting or item substitution.

Employee Empowerment

CRIBWARE software provides the tools necessary for employees to do their jobs better.



Modularity, Scalability, Concurrent Users

Flexibility is the key to the CRIBWARE system. Optional functionality may be added at any time. Growth, from additional users, added cribs or just more user traffic, is easily accommodated by an industrial grade database manager. A software based license manager counts only concurrent or active users. Part time users can share a single license.

CRIBWARE in Action

Inventory Control

Inventory control is a primary component of the CRIBWARE system. It maintains all item information and inventory balances, and plans and controls all materials, resources, tools and references needed for your processes. Item set up, Check out, Check in and Vendor selection are the activities performed by this component.

Tracking

Tracking items on a real-time basis provides item location information, cost and usage accountability. Items may be tracked by employee, department, machine, job, operation, work order, work order task, asset and/or two user defined fields. The Check out/in process for each location can be customized to organizational needs by selecting one or more tracking parameters and editing the field names.

Replenishment

Replenish items using order point or max point calculations. A Reorder report can be used for replenishment or passed to other purchasing or administrative systems.

Advanced Reports

Analyze and interpret information with over 350 standard reports for viewing, printing, exporting, or sending via e-mail. Unique reports are created using the Crystal Reports generator.

Utilities

Import, Export, Database Rebuild and Purge, Remote Price Update, Balance Quantities and Period Closing utilities are included with every system.

Security

Each CRIBWARE user may be setup with four levels of security for each CRIBWARE function. This security system maintains the integrity of the system and its information by restricting access based upon the users needs.

Self Serve

The CRIBWARE Self Serve is a designed for ease of use with single purpose screens optimized for bar code usage. It provides check out, check in, receiving and inventory adjustment functions for use in manufacturing cells, storerooms, maintenance departments, tool rooms and other locations that do not have dedicated crib personnel.

Extend your CRIBWARE System

Remember the CRIBWARE system is modular, you purchase only what you need. It is scalable to easily grow and expand with your requirements. Options to consider include the following:

Kitting Control

Group items into assemblies and kits for easier and faster issues and returns.

Replenishment

Automate purchasing and receiving to insure the availability of material.

Rework/Scrap

Manage the material workability process. Know where your regrinds are.

Shelf Life Management

Manage date and lot sensitive material to assure the availability of items performing to specifications.

Job Management

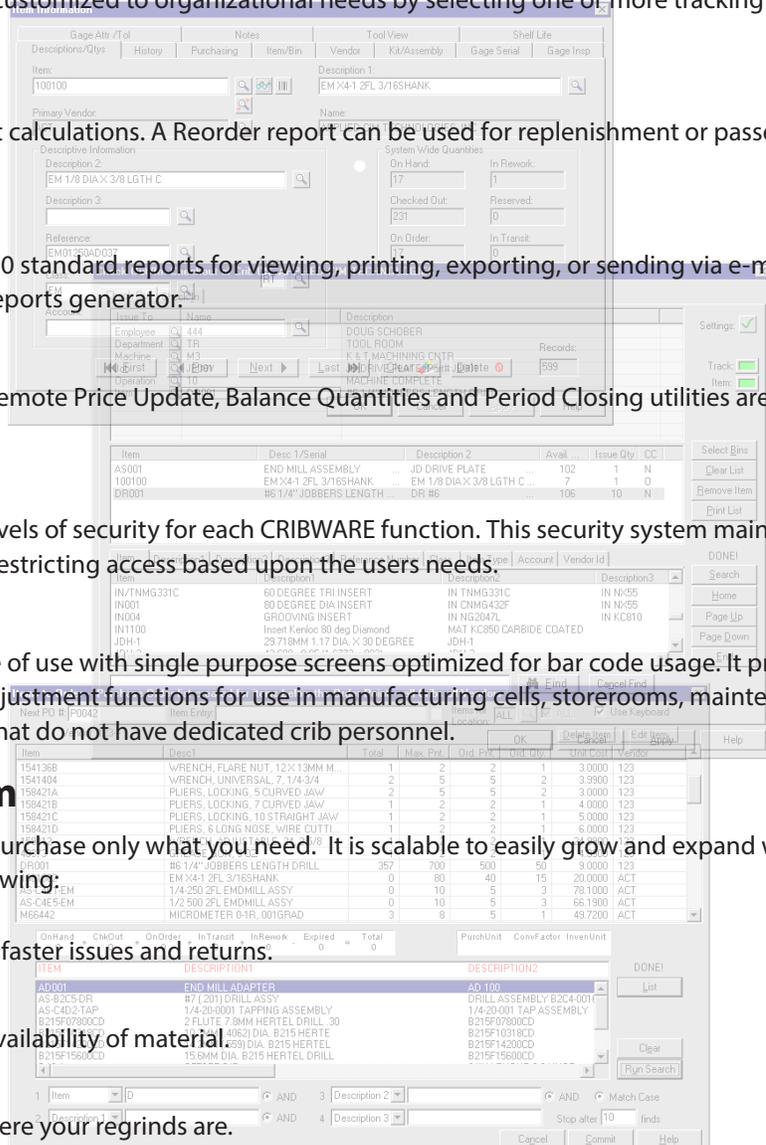
Track job costs, document operations and assure availability of tooling.

Gage and Fixture Management

Incorporate ISO 9000 procedures to provide, automatic calibration scheduling and history.

Inventory Adjustment

Compensate for human and process errors by cycle counting.



Stock Transfer

Track material transfers between crib locations and document the results.

Maintenance Management

Manage assets, schedule work orders, and track service activities.

Courier

Schedule and automate report transmission via e-mail.

Client Server

Maximize performance and improve data integrity on large databases running on local area networks.

Bar Code Data Collection

CRIBWARE bar code technology offers simple, accurate and cost effective data collection.



Bar Code Label Printing

Easy one-step printing, labels may be printed on demand or in batch mode for efficiency.



Bar Code Readers

Wedge Readers (corded and RF scanners) are economical bar code scanners. Cordless scanners are the most common bar code devices sold today.



Portable Transaction Managers

A portable scanner provides the needed flexibility to roam throughout the storeroom and collect data.

Secure Storage

Secure storage devices reduce shrinkage, place material closer to the point of use, insure cost tracking and reduce administrative labor in cribs or storerooms.

CRIB Access Secure material with a software controlled electromagnetic lock in a gate or door to your storage location.

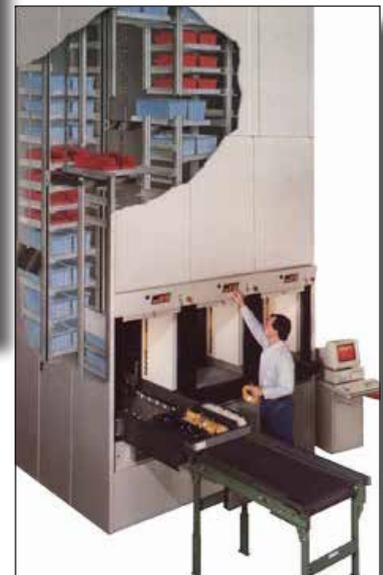
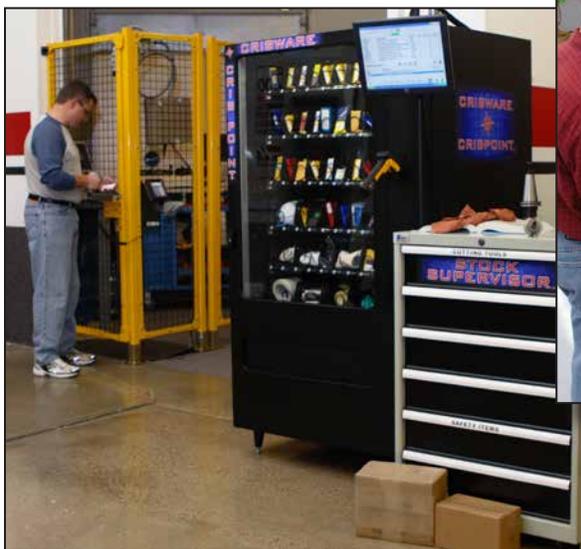
Stock Supervisor Items are stored in locked, Lista cabinets with software optimized for point of use and self serve convenience.

Vending Versatile, rugged, low-cost, industrial systems, for issuing cutting tools, welding accessories, MRO and other supplies, issue secure items at the point of use with usage and cost tracking.

ROTOFLEX CRIBPOINT™ RotoFlex is a bin flexible, industrial point-point-of-use, secure storage dispensing system for a wide range of industrial supplies. Depending upon item size and bin configuration, the CRIBPOINT RotoFlex stores and dispenses up to 720 items, 24 hours a day, 7 days a week.

Kardex/Remstar Access control, usage tracking and replenishment of material in vertical and lift units can be managed by CRIBWARE software.

Remstar Use CRIBWARE machine control for usage tracking and replenishment of Remstar Shuttle or Vertical Carousel storage and retrieval units.



CRIBWARE Installation

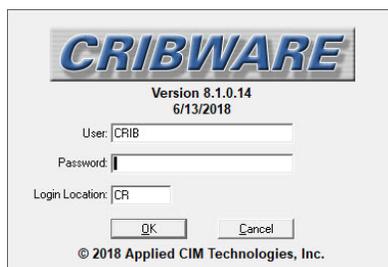
Close all applications before running this install. If you downloaded the software from our website skip to step 4.

1. If you received a software CD, insert the CD into your computer's CD drive.
2. If your computer has Autorun enabled, InstallShield® will start automatically. Go to step 6.
3. If Autorun is not enabled, click Start and choose Run. Type "D:\setup.exe" and click OK (assuming D: is your CD drive). Otherwise, browse out to My Computer and double-click the CD drive that contains the CRIBWARE CD.
4. Locate and select the Setup.exe file and click Open.
5. Click OK to continue.
6. The "Welcome to Installshield Wizard" screen will appear. The CRIBWARE End User License Agreement is displayed. Select "I accept the terms in the license agreement" to continue.
7. Click Next to accept the default destination folder. The default destination folder is C:\Program Files\CRIBWARE\.
8. The installation information has been entered. If you wish to make any changes, click Back. To cancel the installation process, click Cancel. To begin the installation, click Install.
9. When the Installation Wizard is complete, click Finish.

Starting Up the System

After completing the CRIBWARE software installation you will need to register the software .

1. Start the CRIBWARE program by double-clicking the CRIBWARE icon from the 'CRIBWARE Trial' program group. The CRIBWARE logon screen will be displayed.



2. The following are default user login names and passwords for the sample data. **User:** CRIB; **Password:** CRIB; **Logon location:**CR. Enter **CRIB** in the password field and click OK. A registration screen appears.

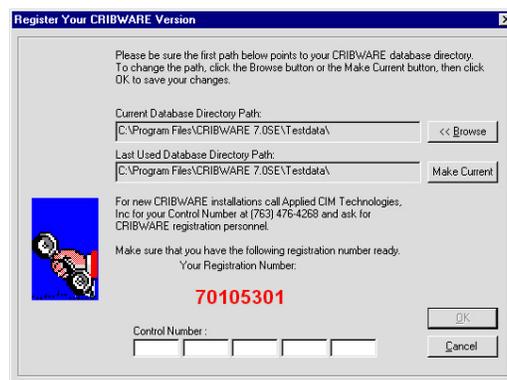


Figure: INST-13.jpg

3. Telephone Applied CIM Technologies, Inc. at 763-476-4268 or 877-461-6543 (or send an e-mail to support@appcim.com) to obtain a control number.
4. Enter the number received in the Control Number field. The control number may consist of alpha, numeric, and special characters.

Logging onto the CRIBWARE System

The following are default user login names and passwords and may be modified by your System Administrator after system setup.

Default User Log On for installed sample data

User: CRIB
 Password: CRIB
 Logon location: CR

This default user, used with the Testdata database, is used most commonly for demonstration or training purposes. This way users can learn the software without risking corrupting the actual production data.

System Administrator Default Log On

User: SYSTADMIN
 Password: CRIBWARE
 Logon location: ##

The System Administrator sets up the individual users, security profiles, crib locations, and the system defaults. Only the System Administrator can access the functions found on the System Administrator submenu.

CRIBWARE Work Area Basics

The CRIBWARE software is organized with a series of windows referred to as screens. Access to each main database or activity is available via a menu pick or toolbar button. The CRIBWARE program is a modular system and many configurations are available. Certain menus and icons may be disabled or certain tabs invisible in your trial installation.

Menus & Toolbars

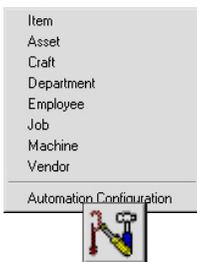
There are six menus in the CRIBWARE application.

File	Configure most of the CRIBWARE system and perform global maintenance.
View	Reduce screen clutter by hiding or showing the CRIBWARE toolbars and status bar.
Database	Enter, view, and edit information in the primary CRIBWARE databases.
Reports	Access CRIBWARE listings, standard reports, and Advanced Reports.
Activities	Access all CRIBWARE tasks and functions.
Help	View CRIBWARE Help, providing an index of searchable topics, online copies of the CRIBWARE User and Reference manuals, and information about the installed CRIBWARE application.

There are two toolbars, Database and Activities, that provide quick access to the most commonly used databases and activities. You can show or hide the toolbars, and you can dock them to the top, bottom, or side of the CRIBWARE window. Buttons for About and Help are included on the Database toolbar and buttons for the reporting features are included on the Activities toolbar.

Database Menu & Toolbar

Enter, view, and edit information in the primary CRIBWARE databases.



The Database toolbar also provides access to the databases. For more complete information on the CRIBWARE databases, refer to Chapter 3 in the CRIBWARE User's Manual.

Item

A record for each item stored in a CRIBWARE location must be set up and given a unique identification number. The main Item information screen may contain up to 12 screen tabs that assist in identifying each item including: Description/Quantities, History, Purchasing, Item/Bin, Vendor, Kit/Assembly, Gage Serial, Gage Inspection, Gage Attributes/Tolerances, Notes, Tool View, and Shelf Life. The actual tabs displayed will depend on your CRIBWARE configuration.



Asset

Asset Management is a link between the equipment and facilities that need to be maintained and the rest of the CRIBWARE system. The Asset Management database provides the identification, status, service tracking, and maintenance task documentation for physical assets. The asset may be used as a tracking parameter during the check out of an item.



Craft

Set up the craft requirements needed for managing the maintenance process with this database. Any employee that will work on a work order may be assigned a craft designation. Any task that is to be performed may have a craft requirement. Any employee may be assigned to a craft and a work order task may have craft requirements.



Department

Set up unique departments for usage tracking and costing purposes. Employees may also be assigned to a default department.



Employee

Create and modify employee records for usage tracking of items on an individual employee basis. Assign an employee to a department/craft and to none, one, multiple, or all jobs.



Job

The Job screens provide tracking information about specific jobs within your organization. Each job may be assigned to a particular machine and may have multiple operations. Additionally, each operation allows for the assignment of an item list that may be used when issuing tooling by Operation. This provides job-costing capability. Tabs for additional comments, instructions, or text files for both Job and Operation are also provided.



Machine

Set up machines to provide usage tracking information. You can also maintain the communication parameters and DNC program information for your machines.



Vendor

Included with all CRIBWARE systems, you can set up vendors with address and accounting information for use on requisitions, reorder reports, and purchase orders. Multiple contacts and automatic ordering parameters can be set up.

Activities Menu & Toolbar



Most of the day-to-day work performed in the CRIBWARE program are accessed from the Activity menu or toolbar. The activities include the issue and return of items to the various crib locations, perform calibrations and inspections, scrap worn-out items, rework or refurbish tooling, replenish the system by creating orders, perform inventory functions and adjustments, restock cribs, create data for bar code printing and upload data collected on portable transaction managers, create and schedule maintenance work orders and tasks, and perform work on and update the status of work order tasks.



Check Out/In The Check out/in function gives you the ability to issue and track items.



Gage History Maintain accurate gage calibration and fixture inspection histories.



Scrap Scrap items that are no longer functional.



Rework Control items in rework, regrind and refurbishment activities.



Purchase Orders & Requisitions Create requisitions and place purchase orders with vendors.



In-Inventory Adjustment Managing a crib requires the ability to make adjustments to the inventory; this function allows you to make manual adjustments, prepare and select items for cycle counting and add items to selected bins.

**Stock Transfer**

Transfer items from one crib location to another without going through the check out/in process.

**Upload Barcode Reader**

Upload transaction information collected by portable batch transaction managers into the CRIBWARE databases.

**Work Orders**

Create and monitor work orders, their task schedules, and the material and craft requirements necessary for task completion.

**Maintenance Service**

Update work order task activities assigned to specific employees using the Start, Stop, On Hold, and Finished function.

**Advanced Reports**

CRIBWARE Advanced Reports are designed to analyze and interpret important tool management information from the CRIBWARE databases. These Advanced Reports use extensive logical criteria to extract the desired data. Advanced Reports can also be sent via electronic mail (e-mail) or exported in several formats for exchange with other applications.

CRIBWARE Button Basics

The CRIBWARE system is a Windows-based program, so the same procedures for using menus, toolbars, selecting text, and editing fields applies to this application as it does other Windows applications. The following buttons and search techniques may be unique to the CRIBWARE application.

The OK button performs three similar functions: In view mode, the system closes the current window. In the add or edit mode, the system prompts you to write the record or restore previous values and close the window. When the Text Editor is open and displaying a report or listing, the system closes the Reports or Listings dialog and returns you to the main screen.

The CANCEL button closes the current dialog box without making any changes.

The APPLY button prompts you to write (or save) the record and any changes made to the database.

The CLEAR button clears the data fields to add a new record without duplicating the record being viewed. Clears the screen for new data entry.

The DELETE button PERMANENTLY removes the record displayed on the screen. When you click Delete, the system will ask if you want to permanently delete the record. If you click "Yes" the record will be removed from the CRIBWARE database.

The FIRST, PREV, NEXT, and LAST buttons allow you to move through records without using the Search function.

Searching CRIBWARE Records

The CRIBWARE software has two search buttons, Search and Advanced Search. These search buttons perform differently and may be used to find items in the database depending on what is known by the user. The Search button  is universal throughout the software and is used in most cases to locate the desired item. The Advanced Search  provides a wild card search method for finding any occurrence of a value in a field. The Advanced Search, used only for locating items, is available on the Description/Qty tab of the Item information screen and is accessible in the Check Out and Stock Transfer activities.

Using the CRIBWARE Standard Search

1. Click the Search button  next to the field you want to search. This will open the Search dialog. Depending on the size of the database you are searching, results will be automatically displayed. If no results appear in the window, click the FIND button.
2. If you don't see the record you want, try searching a different field by clicking the Search By tab for that field and click FIND. All fields that can be searched are listed, but may not be displayed. To locate the field you want to search by, use the scroll arrows to the right of the tabs.
3. Use the scroll bars to find the record in the displayed results. The Home, Page Up, Page Down, and End buttons will also move you through the displayed results. (Page Up and Page Down moves you thru the database 14 records at a time, Home returns you to the first record, End to the last record.)
4. Select the desired record and click OK or double-click the record to close the search dialog and display the record on screen the search was performed from.

Using Advanced Search

The Advanced Search is useful in locating items when you do not know enough information about an item to locate it using the Standard Search. The Advanced Search function, used only for locating items, allows you to enter a search value in up to four fields at a time and locates any occurrence of the value within the field. The Boolean expressions AND/OR are used to further limit or expand your search results. You can further limit the returned search results by using the Match Case feature or by telling the CRIBWARE application to stop searching after a certain number of finds or matches have been made.

To run Advanced Search, click the Advanced Search button .

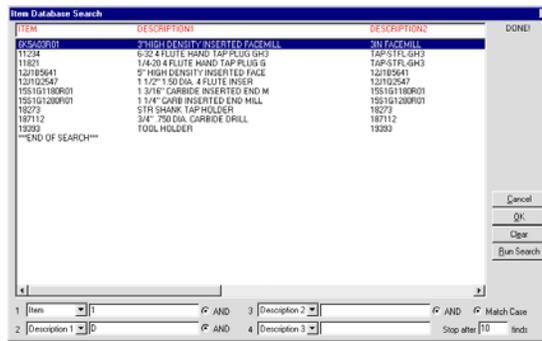


Figure: BAS-02.jpg

1. Select the field you want to search from the drop-down list in box 1.
2. Enter the known or desired value you want to search for in the text box to the right of the drop-down list.
3. If you want to limit your search results, select a second field to search and enter the desired value. The AND option is selected by default and the search results will contain the criteria entered in all fields selected for the search.
4. If you want to broaden your search, clear the AND option button. This will change AND to OR and expand your search results to include the field criteria entered in either field.
5. Enter the number of matches you want the search to return in the Stop After ??? Finds box. This limits the overall results returned in case the system encounters a large number of items that meet the criteria entered.
6. If you do not want your search to be case sensitive, clear the Match Case option (the default setting is set to on).
7. When all fields and criteria have been entered, click Run Search. To clear the search criteria and start over, click Clear.
8. Once you have found the desired item, select it and click OK to view the record.
If you can not find the item in the search, review the value in the "Stop after ??? finds" box.

Item Check Out/In



The Check Out/In activity controls the issue and return of items from your storeroom, crib, cell, etc. The CRIBWARE location that you entered at log in is used by the system to determine which storage location you are issuing items from and returning items to. Performing a Check out or Check in creates a history of your item usage, while affecting the inventory levels. A Check out decrements inventory on hand, while a Check in increments it. The issue of a returnable item decrements Quantity On Hand but increments the Quantity Checked Out field, for the entire system, as well as the location the item is being removed from.

The CRIBWARE system provides real-time costing, item location, life cycle information and usage accountability by controlling issues and returns. Tracking parameters capture the necessary information, with entry of the parameters being mandatory, optional or create. Parameters will be validated against the corresponding database and the tracking indicator will provide a visual cue if the information entered is correct. This type of item tracking provides complete accounting of tooling and manufacturing accessories consumption, providing management with accurate records and analysis, to fully manage your tooling investment.

Common Check Out/In Screen Features

Both screens have three main sections. The top section of the Check Out screen is where tracking parameters are entered for issuing an item. This section of the Check In screen shows the check out information and status of the item being returned. The middle and bottom sections serve the same purpose on both screens: in the middle is the list of items being issued or returned, and at the bottom is search.

Two indicators, Track and Item, provide a visual cue if the information entered is correct. These indicators will be green if the entry is valid, red if it is invalid. Validity is determined by whether or not the entry can be verified against the corresponding database.



Select Bins

Used to edit the check out quantity or select a particular bin location during the Check out process. The system defaults to the first bin location that matches condition category check out order specified in the Crib Location Setup. It is also used to select the serial number of a gage or fixture being checked out.

Clear List

Clears all tracking parameters and items from the Check out or Check in List.

Remove Item

Removes the selected item from the Check out or Check In list.

Print List

Prints a list of the currently displayed items. This is not an accurate listing of the items actually checked out or checked in, only those currently displayed.

Item searches can be done using the Search function or the on-screen Search window, located at the bottom of the Check Out/In window. This on-screen search provides a faster, more robust item search during Check Out, as either a Standard or Advanced Search (using logic criteria) can be performed. The Search button will activate the Advanced Search and the List button will restore the Standard Search.

With CRIBWARE you will always know where your items are if you utilize one or more tracking parameters during the issuing process. Items may be tracked by employee, department, machine, job, operation, work order, work order task, asset and/or two user defined fields.

Settings Button



Figure: CICO-10.jpg

Click the Settings button to display options for optimizing your Check out/Check in process. These include the printing of check out or check in list and specifying your primary data entry device.

Print on Apply

When selected, a pick list of the items being checked out or a receipt of the items being checked in will print when the transaction has been completed by clicking Apply. If you do not need a pick list or receipt, clear this check box.

Keyboard

If you are using a keyboard to enter information, select the keyboard radio button. When an item is entered in the Item field, press ENTER to add it to the Check Out List with its issue quantity dis-

played. Once added to the list, press ENTER or SHIFT+ENTER, to increase or decrease the Issue Qty by the default Issue Quantity entered on the Item/Bin screen. To increase or decrease the quantity by one, use the PLUS SIGN(+) and MINUS SIGN(-).

Barcode Wedge

If you are using a barcode wedge scanner to enter information, select the Barcode Wedge radio button. When you scan an item number, the item is immediately added to the Check Out List with its issue quantity displayed. Scan the item again to increase the Issue Qty by the default Issue Quantity entered on the Item/Bin screen. To increase or decrease the Issue Qty by 1, use the PLUS SIGN(+) and MINUS SIGN(-).

Tracking Parameters

The tracking parameters section will vary based on your companies' needs and how the system administrator set up the location you are logged in to. A single parameter, generally Employee, and as many as ten parameters, may be displayed.

Item Check Out

During the check out process, data entry may be done using the keyboard or a wedge scanner. The primary data entry device should be specified for each workstation at the time of the first check out. A bar code wedge scanner can greatly improve the speed and accuracy of the Check out process.

1. From the Activities menu, select Check Out/In or click the Check Out/In button on the Activities toolbar.
2. Click the Settings button if you need to specify your primary data entry device or if you want or need a pick list or receipt generated when the check out is complete.
3. Enter the displayed tracking parameters. If you do not know the information, use the Search function.

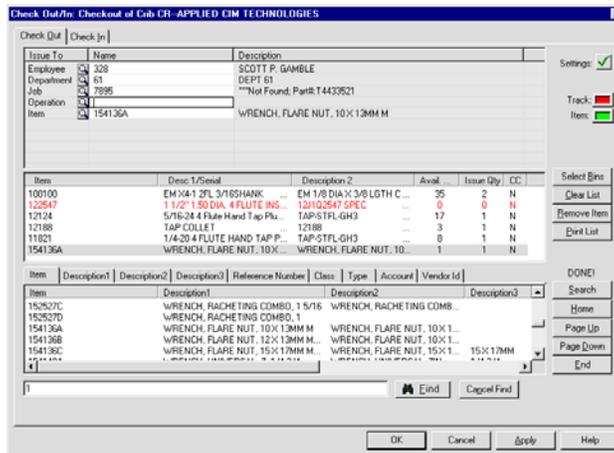


Figure CICO-02.jpg

4. Enter the part number for the item desired. If the item is not known, use the Search function or perform an on-screen search. If using the Search function, double-clicking the item will enter it in the Item field. Press ENTER to add it to the Check out list. If using the on-screen search, double-click the to add it to the Check out list.

Changing the Issue Bin Location & Quantities

When checking out an item, the CRIBWARE program defaults to 1) the first bin location that matches the Check out Condition Category order defined by the system administrator when the CRIBWARE location was set up and 2) the issue quantity of the item as entered on the Item/Bin tab of the Item Information screen.

Sometimes, you may want to change either one or both of these fields. (This would be necessary if the issue quantity for the item is 2, but you need one, or maybe three.) To do this:

- Select the item on the Check out list you want to change the bin or issue quantity for. Double-click the item or click the Select Bins button.



Figure: CICO-03.jpg

6. The Select Bins screen displays the item, description 1, and type at the top of the screen. The crib location, kit assignment, available and issue quantities. The Available quantity is quantity available from bins with a condition category of New. The Issue Qty field will reflect the quantities entered in the Needed column of the Bin Locations section. The Bin Location section lists the Loc X and Loc Y bin assignments for the item selected. Quantities are changed in the Needed column for each bin. The available bin quantity is shown as well as the condition category for that bin.

7. Determine which bin you want to issue the item from and enter the desired quantity in the Needed field. Unless you are issuing from multiple bins, make sure the Needed quantities for the other bins is 0.

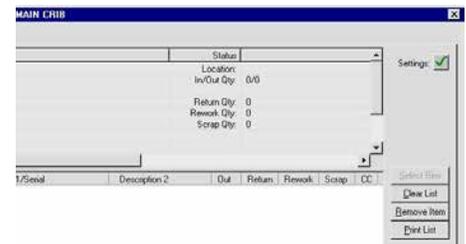
- If you need to change the bin or quantity for any other items being checked out, scroll through the item list using the FIRST, PREV, NEXT, and LAST buttons to find the item(s) and make the changes you want. Once all edits are complete, click DONE to return to the main Check out window.
- If you are ready to complete the check out, click APPLY. This will save the transaction and update the inventory and history fields. At this time, a pick list or receipt will print if the Print on Apply option was selected.

Check In Screen Features

The Check in tab is where items are returned to inventory. The top portion of the screen provides information on the item issued, the middle portion a list of the items being returned, and the bottom in an on-screen search.

Check In Status

The Status column on the upper right hand side of the window information on provides location and Check Out/In history. This is also the area where Return, Rework, and Scrap quantities are entered.



Location

The location you are currently logged in and are returning items to. You can only return items to this location. If you need to return an item to another location, log off this location and log on to the desired location.

In/Out Qty

Total number of this item currently Checked in and Checked out.

Return Qty

The quantity of this item you want to check back in to inventory. This quantity is added to your On Hand inventory.

Rework Qty

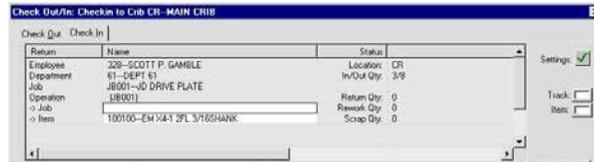
Quantity of the item being checked in to Rework. This number is added to the In Rework quantity.

Scrap Qty

Quantity of the item being sent to Scrap. This quantity will be removed from the Checked Out quantity and the system.

Check In On-Screen Search

During Check in, the on-screen search provides a faster way to return items, allowing you to search and sort the check out records by the tracking parameters entered during Check out.



Sorting Items for Check In

By selecting one of the tracking tabs, you can both search and sort the check out records for easier selection. For example, if you want to find all items checked out to a specific employee, select the Employee tab, and click Find. The check out records will be sorted by the Employee ID. If you know the ID, enter it in the Search field and the search will return only the check out records for that employee. If the All Tracking check box is selected, all possible tracking parameters (11) will be displayed for the searching and sorting.

Filtering Items for Check In

When the Check in tab is selected, the system displays by default, only Checked out, returnable items for the logged on location. The search can be further filtered by selecting or clearing these check boxes:

Open Returnables (Default) Displays all Checked out, returnable items.

Non-Returnables Displays all Checked out, nonreturnable items.

Closed Returnable Displays all returnable items already Checked in.

All Locations If selected, search results will include the items for all locations, limited by the filters listed above.

Item Check In

The Check in screen allows you to return previously issued items to inventory, rework, or scrap. During the check in process, data entry may be done using the keyboard or a wedge scanner. The primary data entry device should be specified for each workstation at the time of the first check in. A bar code wedge scanner can greatly improve the speed and accuracy of the Check in process. For more details on using a bar code scanner, refer to the Check Out Check In chapter of the CRIBWARE User's Manual.

1. From the Activities menu, select Check Out/In or click the Check Out/In button on the Activities toolbar. Select the Check In tab.
2. Click the Settings button if you need to specify your primary data entry device or if you want or need a receipt generated when the Check in is complete.
3. Select the tracking parameter you want to search and sort the check out records by. For more information on this feature, refer to the previous section on Sorting Item for Check In.
4. Select the desired filters to expand or limit the search results. For an explanation of these filters, refer to the previous section on Filtering Items for Check in.
5. Enter your search information in the search field and click Find. If the search is returning too many results, click Cancel Find and change your search parameters.
6. Once you have located the correct check out record, double-click the item to add it to the Check In list. The Status column now shows the detail of the item selected. To add more items to the list, repeat steps 3-6.

Check Out/In: Checkin to Crib CR-APPLIED CIM TECHNOLOGIES

Check Out: Check In

Return	Name	Status
Employee	222--JOHN NELSON	Location: CR
Department	D2--TURNING DEPT	In/Out Qty: 0/5
Machine		
Job		Return Qty: 0
Operation		Rework Qty: 0
-> Employee		Scrap Qty: 0
-> Item	100100--EM X4-1 2FL 3/16SHANK	

Item	Desc 1/Serial	Description 2	Out	Return	Rework	Scrap	CC
100100	EM X4-1 2FL 3/16SHANK	EM 1/8 DIA X 3/8 LG...	3	1	0	0	N

Employee	Department	Machine	Job	Item	Loc
222	100100			20030415	0
222	100100			20031202	N
222	AS003			20030106	N

Settings: Track: Item:

Select Bins: Clear List Remove Item Print List

DONE! Home Page Up Page Down End

Open Returnables Non-Returnables Closed Returnable All Locations All Tracking

222 Eind Cancel Find

DK Cancel Apply Help

Figure: CICO-13.jpg

- Enter the quantity to be returned to inventory in the Return Qty field, to rework in the Rework Qty field, and to scrap in the Scrap Qty field. The sum of these three fields cannot exceed the number items checked out. These entries will update the Return, Rework, and Scrap columns on the Check In list.
- If item was returned to rework or scrap, enter or select a rework or scrap reason. Use the Search function to display a reason list for easy selection.
- Items are automatically returned to the first bin listed based on the condition category defaults that have been set for this crib location. If you would like to return the item to a specific bin location, click Select Bins and enter the return quantity in the Needed field of the desired bin. The sum of the Needed fields cannot exceed the number being returned. Click Done return to the main Check In screen.
- If you are ready to complete the check in, click APPLY. This will save the transaction and update the inventory and history fields. At this time, a receipt will print if the Print on Apply option was selected.

CRIBWARE Purchasing

The CRIBWARE system automates the ordering process by allowing the creation of both purchase orders and requisitions. The creation process for purchase orders and requisitions is similar, making it easier to learn and use. A common user interface allows requisitions to be converted to purchase orders. The Purchasing function automatically updates the Quantity on Order field on the Item Information screen when an order is placed to your vendor.

To enter the Purchasing/Requisition function, select Purchase Orders and Requisitions from the Activities menu or click the Purchase Orders & Requisitions button on the Activities toolbar. There are four tabs on the Requisitions and Purchase Order screen:

Requisitions and Purchase Orders

Purchase Orders | PO Detail | Requisition | Req. Detail

Purchase Order: 0003 Vendor: MASTER Location: ALL

Vendor Name: MASTER INDUSTRIAL TOOL SUPPLY

EDI PO Receive PO Create PO Add Items Print PO

Item	Account	Description 1	All Qty	Ord. Prc	On Order	Open	PO Status
117188	38000	TAP COLLET	1	4	5	5	OPEN
18273	38000	STR SHANK TAP HOLDER	1	4	5	5	OPEN
18393	38000	TOOL HOLDER	1	4	5	5	OPEN
20210	38000	E/M HOLDER	6	4	5	0	RECYD
252401	38000	URMA BORING HEAD(1.421.535)	6	4	5	0	RECYD
28338	38000	1 1/4 E/M HOLDER	6	4	5	0	RECYD
454425	42000	10MM 1.2507 DIA. END MILL HOL	6	4	5	0	RECYD
454545	42000	10MM 1.4704 DIA. END MILL HOL	1	4	5	5	OPEN
459200	42000	8MM 1.315 DIA. END MILL HOL	1	4	5	5	OPEN
48956	42000	TOOL HOLDER	1	2	5	5	OPEN
54221	38000	MICROMAX BORING HEAD	6	2	5	0	RECYD
56984	38000	10MM 1.384 DIA. END MILL HOLD	6	4	5	0	RECYD
5914591CSNP	---	1/2-14 NPSF THREAD MILL	7	3	5	0	RECYD
70006	---	REDUCTION BUSHING PART NOS.	1	2	5	5	OPEN
84848	---	TOOL HOLDER	7	3	6	0	RECYD
93123	---	E/M HOLDER	7	4	6	0	RECYD

Cancel First Prev Next Last

DK Cancel Apply Help

Figure: PUR-01.jpg

- | | |
|------------------------|---|
| Purchase Orders | Primary purchase order screen for viewing, creating and receiving complete orders. |
| PO Detail | Secondary purchase order screen for viewing details of each line item on a purchase order. |
| Requisitions | Primary requisitioning screen for viewing, creating and converting requisitions to purchase orders. |
| Req. Detail | Secondary requisitioning screen for viewing details of each line item on a requisition. |

Viewing Purchase Orders

There are three ways to locate a purchase order for viewing: Use the FIRST, PREV, NEXT, LAST to scroll through the records, use the Search function, or type the number in the Purchase Order field and press TAB to display the purchase order you need.



Figure: PUR-02.jpg

In the Search window, select the Search By: PO Number, Vendor ID or Item tab. Enter your search criteria in the Find field and press ENTER or click Find. Double-click the desired record to close this window and return you to the Purchase Order screen with the record showing.

Creating Purchase Orders

The CRIBWARE system has several purchase order creation functions, providing quick and easy purchase order creation. They may be created manually or automatically, using the order or restock point, for all or one vendor. To use these functions, click the Create PO button on the Purchase Orders or PO Detail tab.



Figure: PUR-32.jpg

The purchase order number is displayed in the Next Available PO field. This number can not be edited here, but can be changed after the PO is created. To change the default purchase order number, refer to the topic on Setting System Defaults, PO Parameters in the Installation chapter of the CRIBWARE User's Manual.

Ordering Filters

The ordering filters determine how a purchase order is created. Manually created purchase orders will not use any filters because the CRIBWARE replenishment control features are not being used to determine which items need to be ordered. Purchase orders may also be created automatically using the following filters:

1. All items below the Order point (All Locations, All Vendors).
2. All items below the Order Point for one vendors (specify Vendor).
3. All items below the Bin Restock (One Location, specify Location).
4. All items below the Bin Restock for one vendors (specify Location and Vendor).

Advanced Filters

The Advanced Filter for ordering, lets you further control how an a purchase order is automatically generated by providing Order Method and Quantity filters.

Order Method

You can order items using two methods: Normal Order Quantity or Maximum Point. (These quantities are defined on the Item Information Purchasing screen.) The Normal Order Quantity method uses the normal order quantity for the purchase quantity on the PO. The Maximum Point Order method will order an item by it's Normal Order Quantity until the item's Maximum Point is achieved. Maximum Point ordering will not order an amount exceeding the Maximum Point for the specific item.

Quantity Filters

When creating a purchase order (or requisition), the quantity filters determine which item quantities are used in the order point or restock point calculations. It is these calculations that are used to determine a replenishment need. Clearing a quantity filter removes it from the calculation for determining if the item needs to be ordered. Refer to the beginning of this chapter for a detailed explanation and example of these calculations.

Manually Creating Purchase Orders

CRIBWARE purchasing features allow you to create purchase orders manually by simply selecting items to be ordered. When manually creating orders no filtering is being applied, so no notice is given if an item needs to be reordered based on its current inventory level. To create a manual purchase order:

1. From the Activities menu, select Purchase Orders & Requisitions or click the Purchase Orders & Requisitions button on the Activities toolbar.
2. On the Purchase Orders or PO Detail screen, click Create PO.



Figure: PUR-06.jpg

3. Select Manually Create Purchase Order.



Note

While the Quantity Filters (found on the Advanced Filters screen) do not affect what items are placed on order when creating a PO manually, but because they are used to calculate the Total, clearing a quantity filter will remove it from the calculation, affecting the Total shown. This is important to know if you are basing your order quantity on the total shown. To view or change the Quantity Filters, click Advanced Filters and select or clear the filters you want used to calculate the total shown.

4. Click OK. The screen displays the Items to Order - Purchase Order screen. Based on the items you place on this list, purchase orders will be generated.

Figure: PUR-07.jpg

At the top of the screen is the starting PO number, an Item Entry field, a visual indicator of whether or not the item entered is valid, the location designation for this purchase order, and a check box for keyboard users (selected by default). If you are using a barcode wedge reader, clear the Use Keyboard check box.

5. Type the item number into the Item Entry field and press ENTER, or scan its barcode, to add it to the list.
6. If you do not know the part number of the item, use the Standard Search window at the bottom of the screen. To activate the Advanced Search option, click Search. For more information, refer to the Searching CRIBWARE Records section of the Basics chapter of the User's Manual.
7. Once you have selected the item, all the relevant quantity and ordering information will be displayed. The item number, primary description, total, maximum point, and order point. The Total field quantity is determined by your Quantity Filter choices, displayed between the item list and the on-screen search. If a quantity is shown in red, that quantity is not included in the calculations.

- If you want to edit the order quantity, unit cost or vendor, select the item in the list and click Edit Item. You may also double-click inside any of these cells to enter the Edit mode.

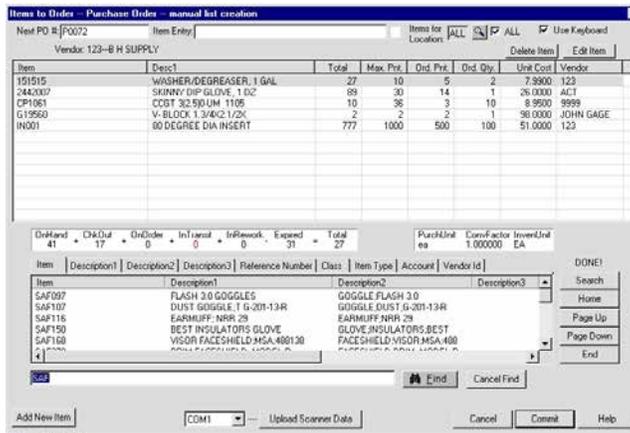


Figure: PUR-08.jpg

Once in Edit mode, the following keys can be used to move around the list, while still in Edit mode:

- TAB** Moves the edit field forward, between the order quantity, unit cost, and vendor cells.
- SHIFT+TAB** Moves the edit field backward between the order quantity, unit cost, and vendor cells.
- UP ARROW** Moves the edit field up an line, in the same column.
- DOWN ARROW** Moves the edit field down an line, in the same column.
- PAGE UP** Moves the edit field to the top of the item list, in the same column.
- PAGE DOWN** Moves the edit field to the end of the item list, in the same column.

To select an alternate vendor for an item, double-click the Vendor field and click the small button to the left of the selected vendor to open a Search window for selecting vendors. Any vendor changes will only be in effect for the selected item on this particular purchase order. The item's Primary Vendor will not be affected.

- To remove items from the list, select the item and click Delete Item.
- Once all your items have been entered and edited, click Commit to save the item(s) and create the purchase order(s). If items are selected from multiple vendors, the program will automatically create purchase orders for each vendor. That is why there is no "set" purchase order on the screen, but instead a Starting PO number.
- The CRIBWARE purchasing screen displays a window with the Purchase Order Creation results. This window will display how many items were ordered, records created, purchase orders created, and what the starting to ending PO number(s) is. Click OK to close this window and return to the screen you originally created the purchase order from, displaying the last purchase order created.

Creating a PO by Order Point

It is easy to automatically create purchase orders for items below their order point. Using the Order Point Calculation, discussed at the beginning of this chapter, it is easy to determine what items are in need of replenishment for all crib locations. These items are automatically placed on the Items to Order list for review. Items may be edited or deleted.

- From the Activities menu, select Purchase Orders & Requisitions or click the Purchase Orders & Requisitions button on the Activities toolbar.
- On the Purchase Orders or PO Detail screen, click Create PO.
- Select the Below Order point (All Locations) option. The Location ALL will appear at the top of the Items to Order list.
- Select All Vendors.
- Click Advanced Filters to set the Order Method and Quantity Filters. Click Done to return the Create Purchase Order screen.



Note

The Normal Order Quantity method uses the normal order quantity for the purchase quantity on the PO. The Maximum Point Order method will order an item by it's Normal Order Quantity until the item's Maximum Point is achieved. Maximum Point ordering will not order an amount exceeding the Maximum Point for the specific item. The Quantity Filters determine which item quantities are used in the order point calculations. Clearing a quantity filter removes it from the calculation for determining if the item needs to be replenished.

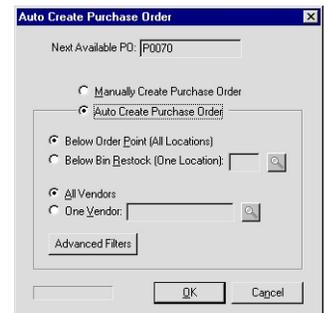
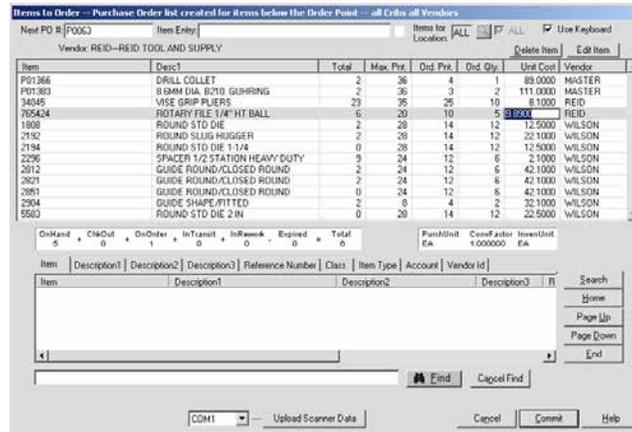


Figure: PUR-05.jpg

- Click OK and the Items to Order - Purchase Order list will be filled with all the items that need to be ordered based upon their Order Point and current quantities. All the relevant quantity and ordering information will be displayed for each item. Based on the order method and quantity filters you selected, the order quantity is set automatically. From this list, separate purchase orders will be created for each vendor.
- If you want to edit the order quantity, unit cost or vendor, select the item in the list and click Edit Item. You may also double-click inside any of these cells to enter the Edit mode.



To select an alternate vendor for an item, double-click the Vendor field and click the small button to the left of the selected vendor to open a Search window for selecting vendors. Any vendor changes will only be in effect for the selected item on this particular purchase order. The item's Primary Vendor will not be affected.

- To add other items to the list, type the item number into the Item Entry field and press ENTER, or scan its barcode. If you do not know the part number of the item, use the Standard Search window at the bottom of the screen. To activate the Advanced Search option, click Search. For more information, refer to the Searching CRIBWARE Records section of the Basics chapter.
- To remove items from the list, select the item and click Delete Item.
- Once all your items have been entered and edited, click Commit to save the item(s) and create the purchase order(s). If items are selected from multiple vendors, the program will automatically create purchase orders for each vendor. That is why there is no "set" purchase order on the screen, but instead a Starting PO number.
- The system will show a window with the Purchase Order Creation results. This window will display how many items were ordered, records created, purchase orders created, and what the starting to ending PO number(s) is. Click OK to close this window and return to the screen you originally created the purchase order from, displaying the last purchase order created.

Receiving Items Against a Purchase Order

Once you have received product from your vendor, you can receive the items into inventory. You can receive partial orders, receive more or less of an item than originally ordered and complete orders. During the Receive function, receive records are generated to show you what you have received by date. This is useful for comparing a monthly invoice to what you have received in your system.

The receiving of most items will take place from the Purchase Orders screen. However, when receiving items you want to assign to a specific bin location, you will need to use the PO Detail screen. This is also the case for receiving serialized items such as gages, fixtures, or shelf life materials.

- Select Purchase Orders & Requisitions from the Activities menu or click the Purchase Orders & Requisitions button on the Activities toolbar.
- Use the FIRST, PREV, NEXT, LAST buttons to scroll through the records, use the Search function, or type the number in the Purchase Order field and press TAB to display the purchase order you want to receive against.

3. With the purchase order displayed, you can receive items two ways:
 - On the Purchase Orders screen, click Receive PO. This will open the PO to Receive screen.
 - Select the items to receiving and click Rcv Sel Items. This will also open the PO to Receive screen.

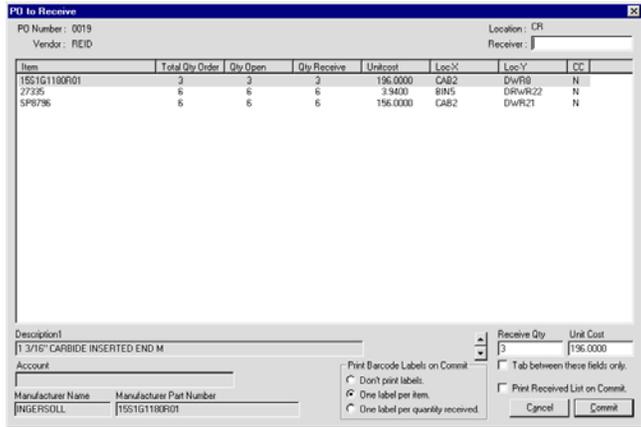


Figure: PUR-19.jpg

4. Enter your name, ID, or other identifier in the Receiver box.
5. In the Print Barcode Labels on Commit section:
 - Select Don't Print Labels if you don't need bar code labels printed.
 - Select One Label per Item to print labels for each item, for the entire quantity, received.
 - Select One Label per Quantity received to print one single label for each item, regardless of the quantity of the item received.
6. To change the quantity being received, double-click the quantity shown in the Receive Qty box and type in the quantity being received.
7. To change the cost of the item being received, double-click the cost shown in the Unit Cost box and enter the new cost.
8. To print a list of the items being received with the storage locations/bins that the items should be put into, select the Print Received List on Commit check box.
9. Click Commit to save and update your inventory in the system.

Specifying a Bin Location upon Receive

1. Select Purchase Orders & Requisitions from the Activities menu or click the Purchase Orders & Requisitions button on the Activities toolbar.
2. Use the FIRST, PREV, NEXT, LAST buttons to scroll through the records, use the Search function, or type the number in the Purchase Order field and press TAB to display the purchase order you want to receive against.
3. Click the PO Detail tab.
4. Click the Receive PO button (on the PO Detail screen). The Receive to Crib screen is displayed.

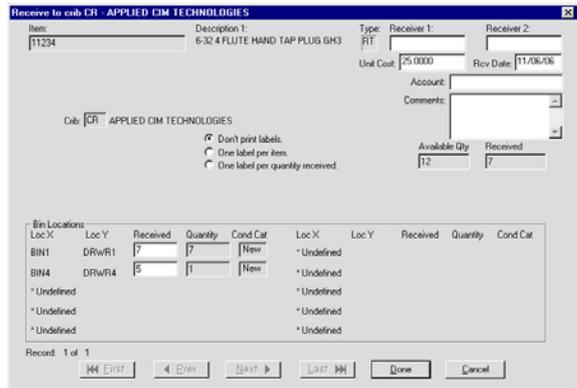


Figure: PUR-20.jpg

5. On this screen you can specify which bin you want to receive what quantity into. In the example above, 7 are being received into Bin 1, Drawer 1, and 5 are being received into Bin 4, Drawer 4.
6. Select whether or not you want bar code labels printed when you complete the receive activity.
7. Click Done to close this screen and update your inventory. You will return to the PO Detail tab.

CRIBWARE Reporting

An integral part of the CRIBWARE system, Advanced Reports provides the tools to report, analyze, document, and export CRIBWARE information. Using the Crystal Reports format, there are over 350 reports available for viewing, exporting, and printing CRIBWARE information. Using the optional Custom Reports Generator, or their own copy of Crystal Reports 11 Professional, customers may customize their reports to include their company logo and or even redesign them to fit their own needs. The Export function can convert completed reports to the following formats: Adobe Acrobat (PDF), Crystal Reports (RPT), HTML, Microsoft Excel, text (TXT), Rich text format (RTF), ODBC, record, separated values (CSV), tab separated text (TTX), and XML.

Report Features

Some of the features provided by Advanced Reports include:

- A report tree for easy report selection.
- Refined selection criteria for more detailed analysis.
- A group tree for quickly moving between the sections of a report.
- A text find to search for specific words or phrases in completed reports.
- A list of recently run reports for easy selection.
- An export function provides the ability to convert completed reports into a format usable by other corporate programs or systems.
- External application can be launched when using the export function.
- Report transmission via e-mail.
- The ability to print bar code labels.

Advanced Reports Menu & Toolbar

File Menu	Contains the commands for printer setup and printing a report. From the Recent Reports list, you can view the last seven reports run, for easy selection of frequently run reports.
Edit Menu	Provides the tools for cutting, copying, and pasting changes made to the Custom Reports & Listings tree.
View Menu	Provides controls for changing the Report Preview window. Displayed toolbars may be toggled on or off. The report tree can be expanded or contracted by node. Selecting the Last Selected Node or Last Zoom setting will remember those settings when Advanced Reports is launched again. Three report viewing options are available here: Maximize Report View, Always Maximize Report View, and Restore Maximized Report.
Reports Menu	Contains the commands for showing a hidden report tree and running a report.

Included Advanced Reports

Over 400 CRIBWARE reports are available for the viewing, exporting and printing. While these reports are available to all CRIBWARE users, if your configuration does not include a particular module, the reports for that module will run, but will not display any data.

Item Master Listing	All Requisitions	Shelf Life Master Listing
Bin Master Listing	All Open Requisitions	Expired Shelf Life Material List
Item Vendors Master Listing	All Closed Requisitions	Open Rework Items
Employee Master Listing	Purchase Order Form	Closed Rework Items
Department Master Listing	Requisition Form	Received Transferred Items
Job Master Listing	Top Purchased Items by Cost	
Machine Master Listing	Top Purchased Items by Ordered Quantity	Manual Bin Adjustments
Vendor Master Listing	Inventory Valuation-Actual Cost	Cycle Counting Bin Adjustments
Item Usage	Inventory Valuation - Average Cost	Asset Master Listing
Maintenance Item Usage	Item History Summary	Asset History
Usage Volume by Item	Detailed Item History	Asset - Where Used
Usage Volume by Vendor	Overdue Items	Work Order Master Listing
Top Used Items by Quantity	Job/Operation Item Listing	Work Order Bill of Materials
Top Used Items by Cost	Kits/Assembly Item Listing	Open Work Orders
Rolling 12 month Usage by Item	Where Used Reports	Closed Work Orders
All Open Purchase Orders	Gage/Fixture Master Listing	Work Order Forms
All Closed Purchase Orders	Gage/Fixture Calibration Due	Work Order Scheduling
Overdue Purchase Orders	Gage/Fixture Calibration Certificate	Work Order - Where Used
Reorder Report	Obsolete Item	Total Number of Work Orders
Crib Restock Report	Scrap Report	Bar Code Labels

Running Advanced Reports

Advanced Reports provides you with the ability to extract detail rich reports, as well as the exact information you are looking for within a report.

Select Advanced Reports from the Reports menu or click the Advanced Reports button on the Activities toolbar. Refer to the previous section to familiarize yourself with the Advanced Reports Main toolbar, the Criteria Section, the Report Tree and the Report Preview window.

1. Select the report category for the report you wish to run from the Report Tree.
2. Select the report subcategory for the report you wish to run from the Report Tree.
3. Select the desired report. The reports are listed by sequence. A sequence defines the order the information will be reported, listed, or exported. This is the how the report will be sorted.
4. Enter your selection criteria (Beginning/Ending criteria, Beginning/Ending Date, Location, New/Used/Other, Summary/Detail, etc.).
5. Click the Run a Report button  on the Main toolbar.
6. Once the report has run, it will be displayed in the Report Preview window.
7. Modify the report by changing the selection criteria values. Click the Run or Refresh button to display the modified report.

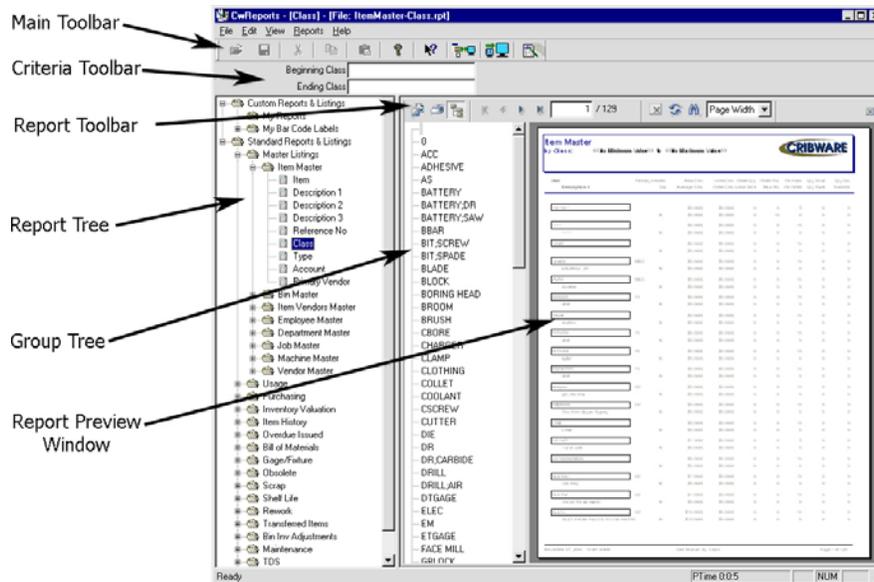


Figure REP-03.jpg

CRIBWARE Resources

CRIBWARE User Manual

The user manual for the person responsible for a CRIBWARE installation and it's "how to" functionality. Choose Online Manuals from the Help menu to access this manual electronically.

CRIBWARE Reference Manual

A technical manual that is a reference source for more technical detail. Choose Online Manuals from the Help menu to access this manual electronically.

Internet Training

Web-based training allows you to take on your inventory control projects at your speed. Start out with the basics then use what you learn during the training to take inventory control to the next level. Each web-based training session is designed to provide you with basic and advanced tips for success.

Pre-sale Analysis and Cost Justification

Experienced Applied CIM Technologies, Inc. personnel will assist in the pre-sale analysis and if necessary prepare a cost justification to ensure a cost-effective solution.

Onsite and Classroom Training

Training is available at your installation site, or an Applied CIM Technologies, Inc. facility. Training will include technical instruction, set up assistance and hands-on training for the daily system use.

Installation and Legacy Data

Our services may include conversion of legacy data, software loading, database population, custom reports, bar code device set up and secure storage installation.

Help

Online help is available on all CRIBWARE screens for assistance in operational questions.

Technical Support

Please call CRIBWARE technical support at 877-461-6543 or send an e-mail to support@appcim.com.

