Inventory Management System
Users Manual

by

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Overview

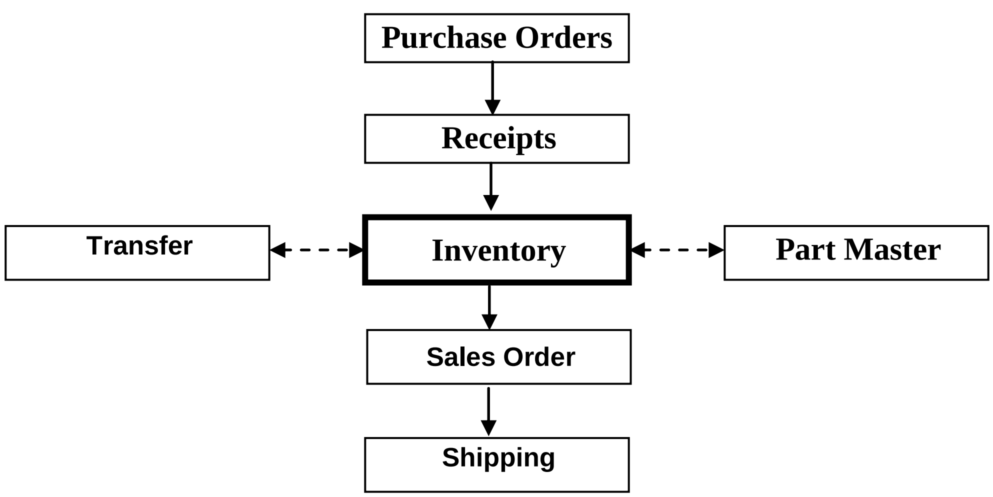
WIN-IMS Overview

The Inventory Management System for Windows (WIN-IMS) was developed to provide small to medium sized companies total, enterprise-wide control of all internal inventory functions. WIN-IMS (IMS) consists of ten main functions (shown in the block diagram) and all the subordinate screens necessary to support the ten main functions. All IMS functions operate seamlessly within an easy to navigate graphical user interface.

At its most basic level, IMS operates as a multiple personal computer (PC) based system with all data collected and entered through the PC keyboard/mouse inputs. Higher levels of the system utilize hand-held computer technology (Videx LaserLite Pro in batch mode or the Percon 320 in batch or radiated frequency (RF) mode) to collect information and enter it into the system.

The Main Functions Block Diagram (shown below) illustrates the basic data flow throughout IMS.

WIN-IMS System – Main Functions Block Diagram



WIN-IMS Software Installation

This document provides simple installation instructions for customers who purchased the single-user standalone license. The database used is Microsoft Access™.

1. Run the WIN-IMS setup from the CD (Setup.exe). Follow the on-screen prompts to install the software.
2. On initial application startup, enter your company identifier and registration key when requested (located on the CD holder for WIN-IMS). The registration will automatically set the number of licenses purchased. *
3. Log in as administrator (user name - admin, password - adminuser). Make sure that you change your password periodically.

* NOTE: The initial installation uses the demo database for you to train and learn with. We do NOT recommend using this database when you are ready to start entering real data. You are prompted to change to a clean database at the time of registration. If you select No for now but wish to switch to a clean database at a later time, there is a blank WIN_IMS_CLEAN.MDB file in the installed application directory (C:\Program Files\WIN-IMS Basic by default) that can be copied and renamed to WIN_IMS.MDB when you are ready to create your own database. (You should rename the demo database to another recognizable name first.)

Once your installation is complete, review the Users Manual for information on how to use WIN-IMS.

WIN-IMS Network Software Installation

This document provides simple installation instructions for customers who purchased a network version of WIN-IMS. The database used is Microsoft Access™.

1. Copy the entire contents of the WIN-IMS CD to a network server location accessible by all users. Select all files and run *Properties* by right-clicking the files. Remove the "Read-Only" checkmark on the *General* tab for the file attributes.
2. From each workstation, browse to the server location and run the WIN-IMS workstation setup (Setup_pc.exe). Follow the on-screen prompts to install the software.
3. On initial application startup, enter your company identifier and registration key when requested (located on the CD holder for WIN-IMS). The registration will automatically set the number of licenses purchased.*
4. Log in as administrator (user name - admin, password - adminuser). Make sure that you change your password periodically.

* NOTE: The initial installation uses the demo database for you to train and learn with. We do NOT recommend using this database when you are ready to start entering real data. You are prompted to change to a clean database at the time of registration. If you select "No" for now but wish to switch to a clean database at a later time, there is a blank WIN_IMS_CLEAN.MDB file in the installed application directory (C:\Program Files\WIN-IMS Basic by default) that can be copied and renamed to WIN_IMS.MDB when you are ready to create your own database. (You should rename the demo database to another recognizable name first.)

WIN-IMS Hardware Installation

Videx LaserLite Pro (Optional)
The LaserLite Pro functions as the data collection device for the check-out of items. The Downloader base connects to you serial port (COM/RS-232) of your computer. It simply requires an available serial port on your PC and the included AC Power Adapter. Follow the instruction sheet included with the handheld for further information.

PSC Falcon PDA (Optional)
The PSC Falcon also functions as the data collection device for the check-out of items. This device connects to the USB port of your computer and uses Microsoft Active Sync to communicate (not included). Application “CAB” files are included for software loading onto the Falcon. Once the CAB files are copied to the handheld, double-click to install the WIN-IMS handheld application.

Zebra Label Printer (Optional)
The Zebra printer uses a standard USB, Serial, or Parallel printer cable. Connect the printer to your PC and power the printer. You must then install the printer driver as though it is a standard Windows printer. A print driver CD is included and should assist you with installation. Updated drivers may also be downloaded from the manufacturer’s WEB site.

NOTE: The “Printing Preferences” for the Zebra print driver has several configuration options that must be set. Most importantly, you MUST setup the default “Print Size” to match the label size being used. Also, ensure the setting for “Media Type” is set to *Thermal Transfer* if you are using a ribbon. Your label design format in WIN-IMS should then match the size of label used.

PC Corded Barcode Scanner (Optional)
A corded barcode scanner can be used to scan check-out and check-in data directly into WIN-IMS. Two connection options are available. The first connects the scanner via your USB port and should auto-configure. The second connects to your PCs keyboard and requires no PC drivers.

For special needs and support, contact PTS within the warranty period or as a part of your Extended Support Agreement.

Before running IMS for the first time

There are several preliminary steps that must be accomplished before the main functions can operate properly. After logging in, click on the **Support** menu item and select **Carriers** from the list. Take this time to enter all the carriers your company uses. Yes, this is time consuming but carrier information is used throughout IMS and entering them now will make your system easier to use and more complete. Besides, once the carrier information is entered, it will never have to be entered again.

Now that Carrier information has been entered, you should again select the **Support** menu item, individually select all of the support functions from the list and enter the appropriate information for your company. Like Carrier information, all of the entered support information is used at various places throughout IMS and should be entered as carefully and accurately as possible. Once all support information is entered, you are ready use IMS.

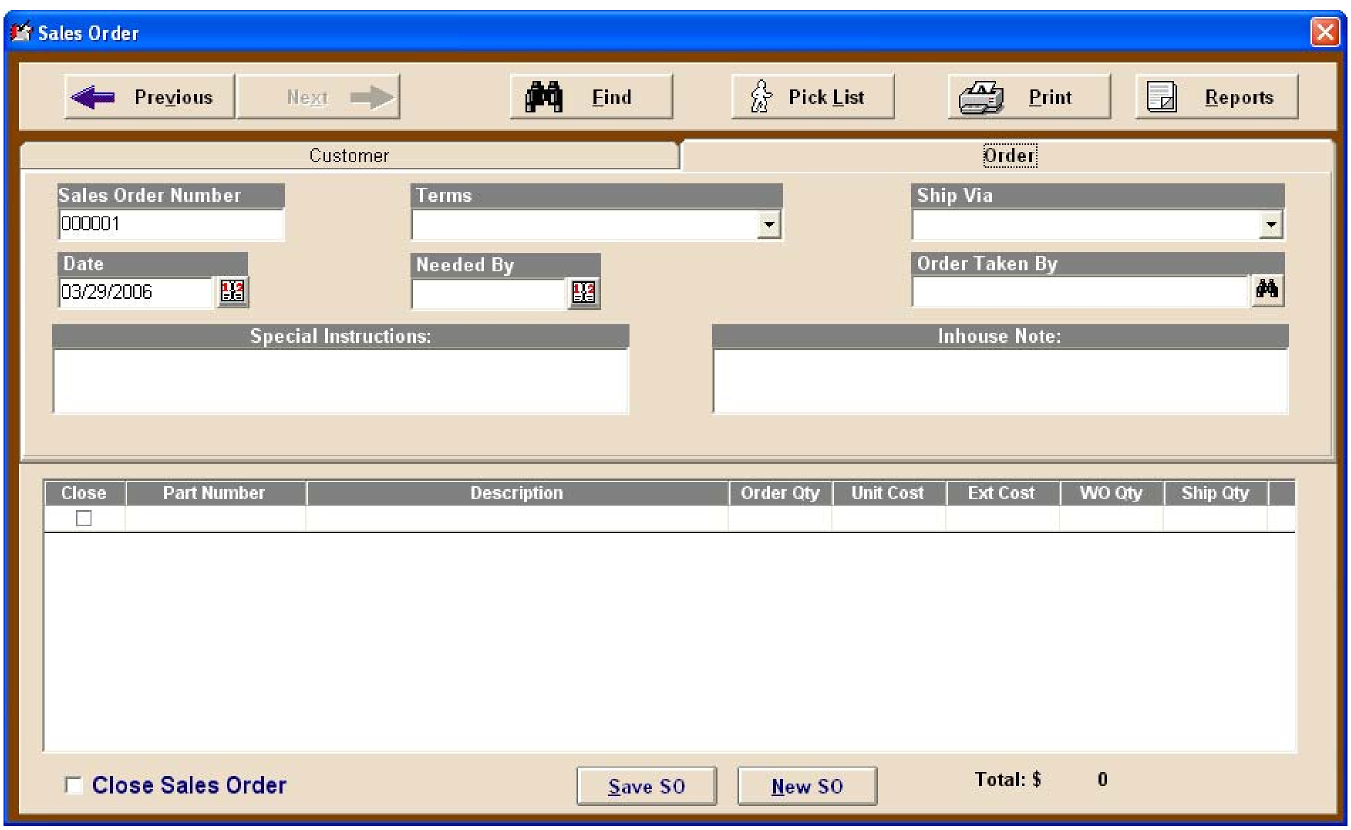
Main Screen

Sales Order Screen

The Sales Order screen provides an easy means to generate and record company sales orders. You may also use this screen to view past sales orders.

To view the Sales Order screen, click the **Sales Ord** button on the WIN-IMS main button bar.

Sales Order



When the Sales Order screen first opens, it is setup for creating a new sales order. It has pre-selected today's date and determined the next available sales order number. This is exactly the same configuration the screen goes to when you click the **New SO** button, which you may click at any time.

*** Note: *By default, WIN-IMS generates Sales Order numbers counting up from 000001. If you use a specially formatted Sales Order number, enter your number in the Sales Order Number field and IMS will maintain your formatting scheme. ****

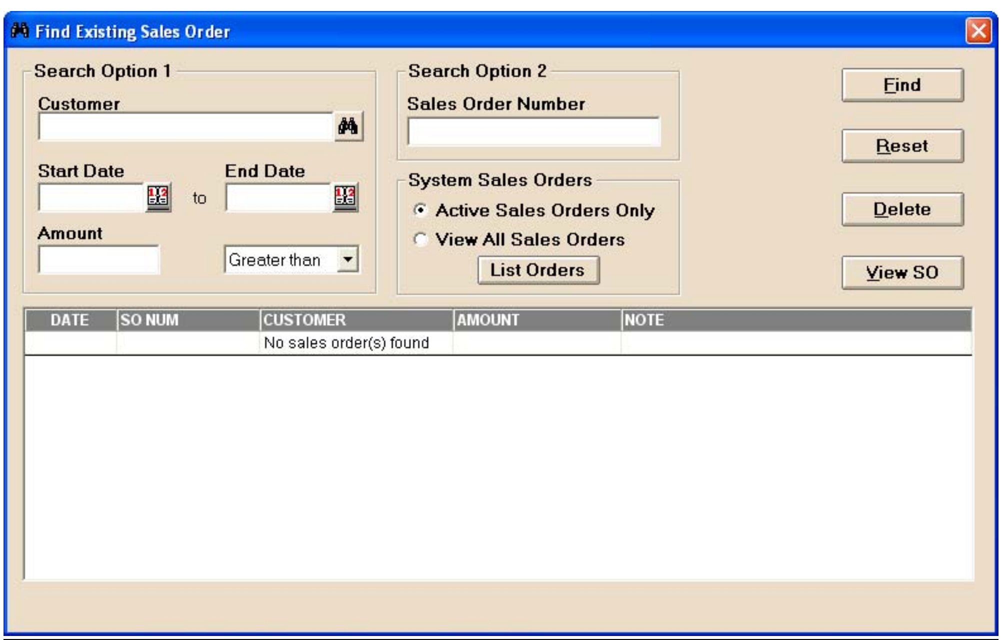
<u>Viewing Sales Order Information</u>
You may view existing sales orders by clicking on the Previous, Next or Find buttons.

<u>The **Previous** Button</u>
Clicking the Previous button displays the Sales Order that was created just prior to the currently displayed Sales Order.

<u>The **Next** Button</u>
Clicking the Next button displays the Sales Order created just after the currently displayed Sales Order.

<u>The **Find** Button</u>
Clicking the **Find** button will display the Find Existing Sales Order screen (shown below). Use the Find Existing Sales Order screen to locate, and display, any Sales Order in WIN-IMS.

*** Note: *One of the two option choices 'Active Sales Orders Only' or 'View All Sales Orders' will always be selected. All search results will depend on the option selected. The 'View All Sales Orders' option will display both open and closed sales orders. The 'Active Sales Orders Only' will display ONLY open (not completed) sales orders. ****



Search Option 1
The Search Option 1 fields allows for searching through the WIN-IMS system for Sales Orders that match the entered data. For example, select a customer and all Sales Orders for that customer will display. Select a customer, enter a Start Date and click the **Find** button. Only Sales Orders for the selected customer created on, or after, the entered Start Date will be displayed. Enter only a Start Date and End Date and click the **Find** button. Sales Orders for *all* customers created on, or after, the selected Start Date but before, or on, the selected End Date will be displayed. Enter a dollar amount, select either 'Greater than', 'Equal to' or 'Less than' and click the **Find** button. Sales Orders matching that selection will be displayed.

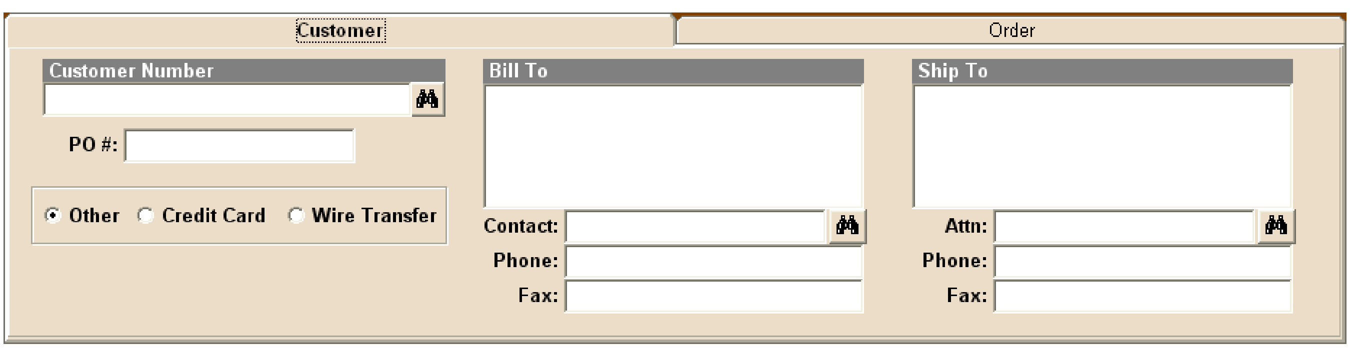
Search Option 2
If you know the number of the Sales Order you wish to view, just enter it in the Sales Order Number field and click the **Find** button. The selected Sales Order number will be displayed.

The **Reset** Button
Clicking the **Reset** button will clear the Find Existing Sales Order screen so you can run a new search.

The **List Orders** Button
The **List Orders** button will display all Sales Orders it finds in WIN-IMS based on the Active Sales Orders/ All Sales Orders option selection.

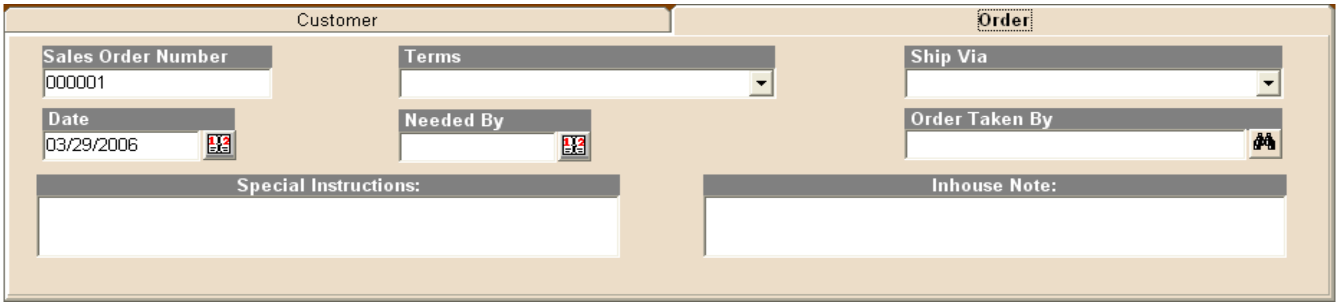
The **View SO** Button
Select a displayed Sales Order by clicking anywhere in the row of the desired Sales Order. Click the **View SO** button to display the selected Sales Order's details on the Sales Order screen.

Creating a New Sales Order
- Click the **New SO** button.
- Select the **Customer** tab.

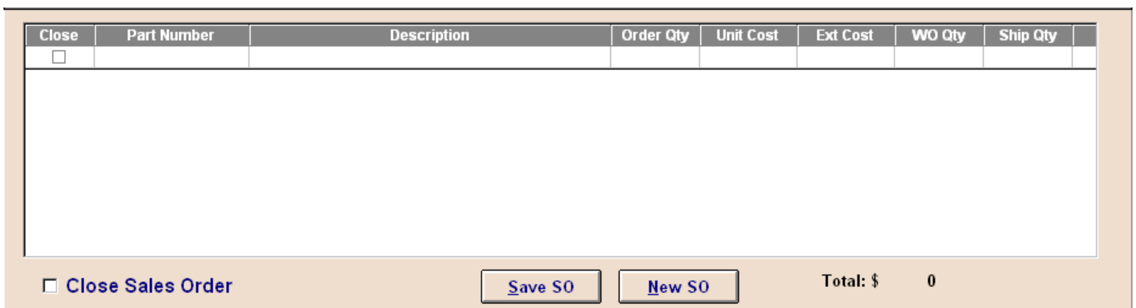


- Click the **Select Customer** button (Binoculars) and select the customer of interest. The selected customer's address information loads into the Bill To and Ship To address boxes. The address information may be manually changed as desired.
- Select the Ship to and Bill to contacts using the **Find Contact** buttons (Binoculars) as desired.
- Enter the Customer's PO number if desired.
- Select the type of payment. If Credit Card is selected the user may select the Credit card holder and information using the **Find Credit Info** button (Binoculars).

- Select the **Order** tab.



- Enter or select the terms for the sale.
- Use the to select the expected carrier (Ship Via).
- Adjust Date if desired.
- Select or enter the date the customer wants the order delivered (Needed Date).
- Use the **Find Employee** button (Binoculars) to select the employee that took the order (Order Taken By).
- Enter special or in-house instructions as desired.



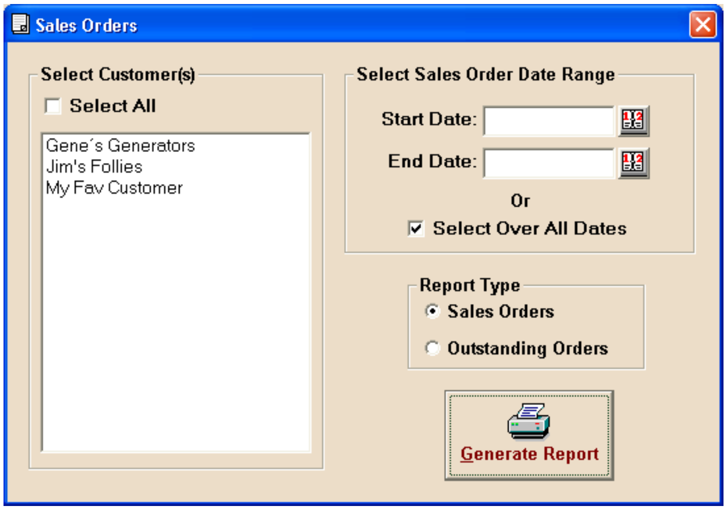
- Use the mouse and click in the Part Number field in the parts list.
- Enter a valid part number and press the **Enter** key or double-click and select from the pop-up part list. If the part number entered is valid, the part description and unit cost will display and the cursor will move to the Order Qty field.
- Enter the ordered quantity and press the Enter key. WIN-IMS will calculate the extended cost and prepare for the next line item entry.
- Click the **Save SO** button when finished.

Printing a Sales Order
Click the **Print** button to view a printable copy of the currently displayed sales order

Printing a Pick List
Selecting the **Pick List** button will display a report that lists the items on the sales order and where they can be found in inventory.

Printing Sales Order Reports

Clicking the **Reports** button will display the Sales Orders Report screen (shown below). Use the Sales Orders Report screen to print a report of Sales Orders in WIN-IMS based on user selected criteria.

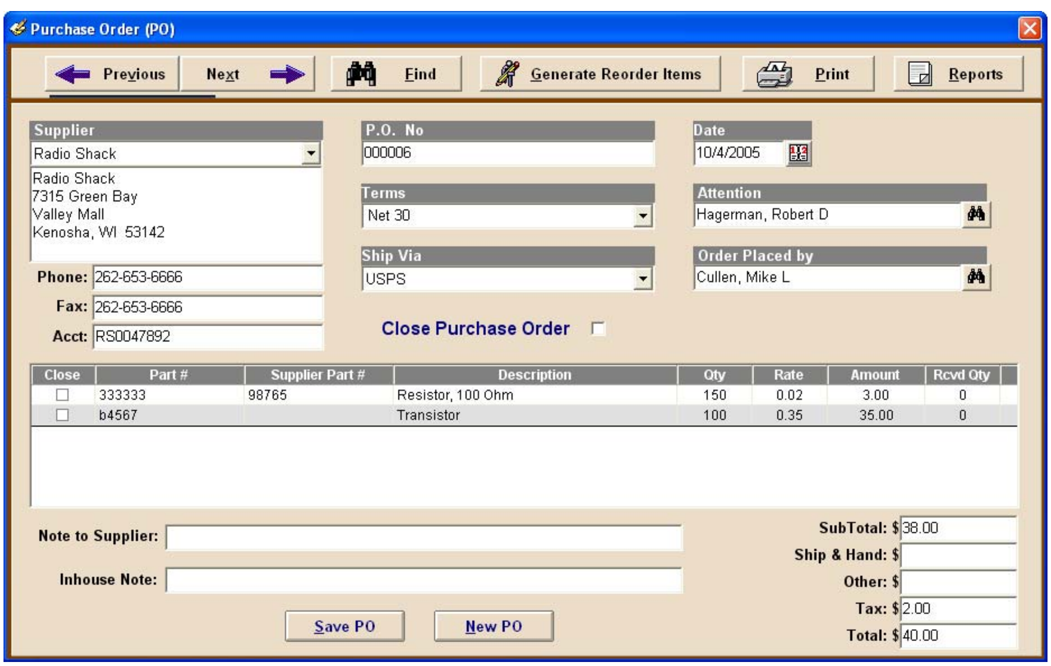


Purchase Order Screen

The Purchase Order screen provides an easy means to generate and record company purchases. You may also use this screen to view past purchase orders.

To view the Purchase Order screen, click the **PO** button on the WIN-IMS main button bar.

Purchase Order



When the Purchase Order screen first opens, it is setup for creating a new purchase order. It has set today's date and determined the next available purchase order number. This is exactly the same configuration the screen goes to when you click the **New PO** button, which you may click at any time.

**** Note: By default, WIN-IMS generates Purchase Order numbers counting up from 000001. If you use a specially formatted Purchase Order number, enter your number in the P.O. NO field and WIN-IMS will maintain your formatting scheme. ****

<u>Viewing Purchase Order Information</u>

You may view existing purchase orders by clicking on the Previous, Next or Find buttons.

<u>The **Previous** Button</u>

Clicking the **Previous** button displays the Purchase Order created just prior to the currently displayed Purchase Order.

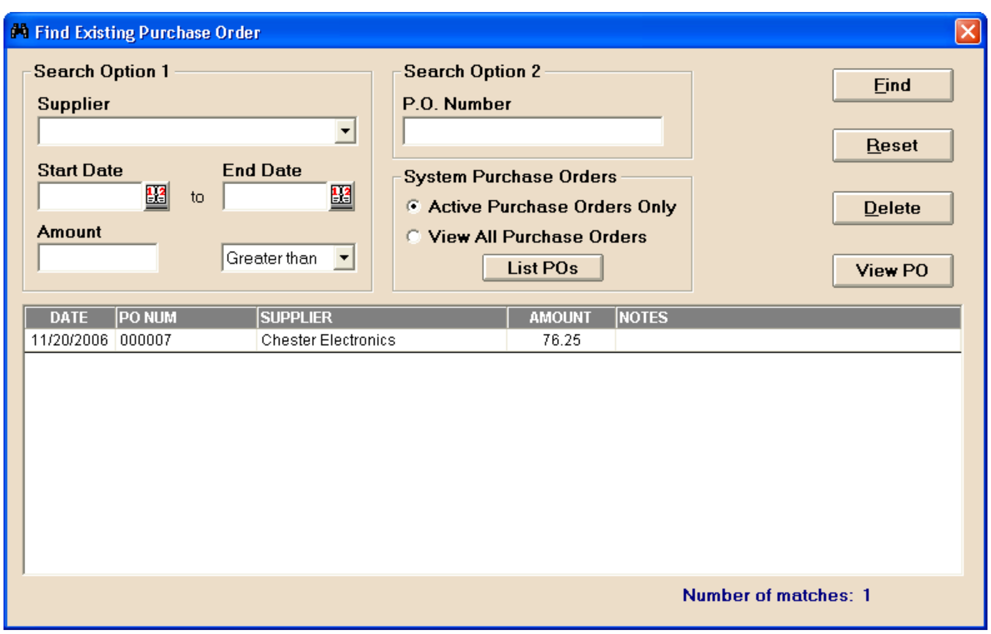
<u>The **Next** Button</u>

Clicking the **Next** button displays the Purchase Order created just after the currently displayed Purchase Order.

<u>The **Find** Button</u>

Clicking the **Find** button will display the Find Existing Purchase Order screen (shown below). Use the Find Existing Purchase Order screen to locate, and display, any Purchase Order in WIN-IMS.

**** Note: One of the two option choices 'Active Purchase Orders Only' or 'View All Purchase Orders' will always be selected. All search results will depend on the option selected. The 'View All Purchase Orders' option will display both open and closed purchase orders. The 'Active Purchase Orders Only' will display ONLY open purchase orders. ****



Search Option 1

The Search Option 1 fields allows for searching through the WIN-IMS system for Purchase Orders that match the entered data. For example, select a supplier and all POs for that supplier will display. Select a supplier, enter a Start Date and click the **Find** button. Only Purchase Orders for the selected supplier created on, or after, the entered Start Date will be displayed. Enter only a Start Date and End Date and click the **Find** button. Purchase Orders for *all* suppliers created on, or after, the selected Start Date but before, or on, the selected End Date will be displayed. Enter a dollar amount, select either 'Greater than', 'Equal to' or 'Less than' and click the **Find** button. Purchase Orders matching that selection will be displayed.

Search Option 2

If you know the number of the Purchase Order you wish to view, just enter it in the P.O. Number field and click the **Find** button. The selected Purchase Order number will be displayed.

The **Reset** Button

Clicking the **Reset** button will clear the Find Existing Purchase Order screen so you can run a new search.

The **List POs** Button

The **List POs** button will display all Purchase Orders it finds in WIN-IMS based on the Active Purchase Orders/All Purchase Orders option selection.

The **View PO** Button

Select a displayed Purchase Order by clicking anywhere in the row of the desired Purchase Order. Click the **View PO** button to display the selected Purchase Order's details on the Purchase Order screen.

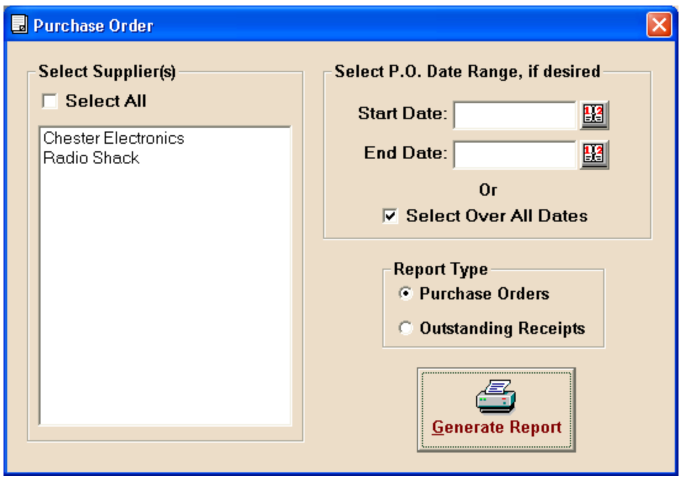
Creating a New Purchase Order

- Click the **New PO** button.
- Click the in the Supplier field. A list of Suppliers appears. Click on one of them. The selected supplier's address information, phone, fax and account number are loaded onto the form.
- Modify or re-select the PO date if required.
- Enter or select the terms for the transaction.
- Select the employee that should be notified of the shipments arrival (Attention).
- Select the carrier for the shipment (ship Via).
- Select the individual initiating the PO (Order Placed By).
- Use the mouse and click in the Part Number field in the parts list.
- Enter a valid part number and press the **Enter** key or double-click and select from the pop-up part list. If the part number entered is valid, the part description, supplier part number, and rate will be displayed and the cursor will move to the quantity field.
- Enter the quantity you wish to purchase and press the Enter key. WIN-IMS will calculate the total cost and prepare for the next entry.
- You may also include a note to the supplier and a note for in-house use.
- In addition, Shipping and Handling, Other and Tax costs may be added to the order.
- Click the **Save PO** button when finished.

Generate Reorder Items
WIN-IMS will automatically generate purchase orders for parts whose quantity in inventory is currently below the *Reorder Point* as set on the Part Master screen. Select a supplier and click the **Generate Reorder Items** button. Parts that are below the reorder point will be listed in the currently displayed purchase order with the order quantity set to the *Reorder Qty* as set on the Part Master screen.

Printing a Purchase Order
Click the **Print** button to view a printable copy of the currently displayed purchase order.

Printing Purchase Order Reports
Clicking the **Reports** button will display the Purchase Order Report screen (shown below). Use the Purchase Order Report screen to print a summary of Purchase Orders in WIN-IMS based on user selected criteria.

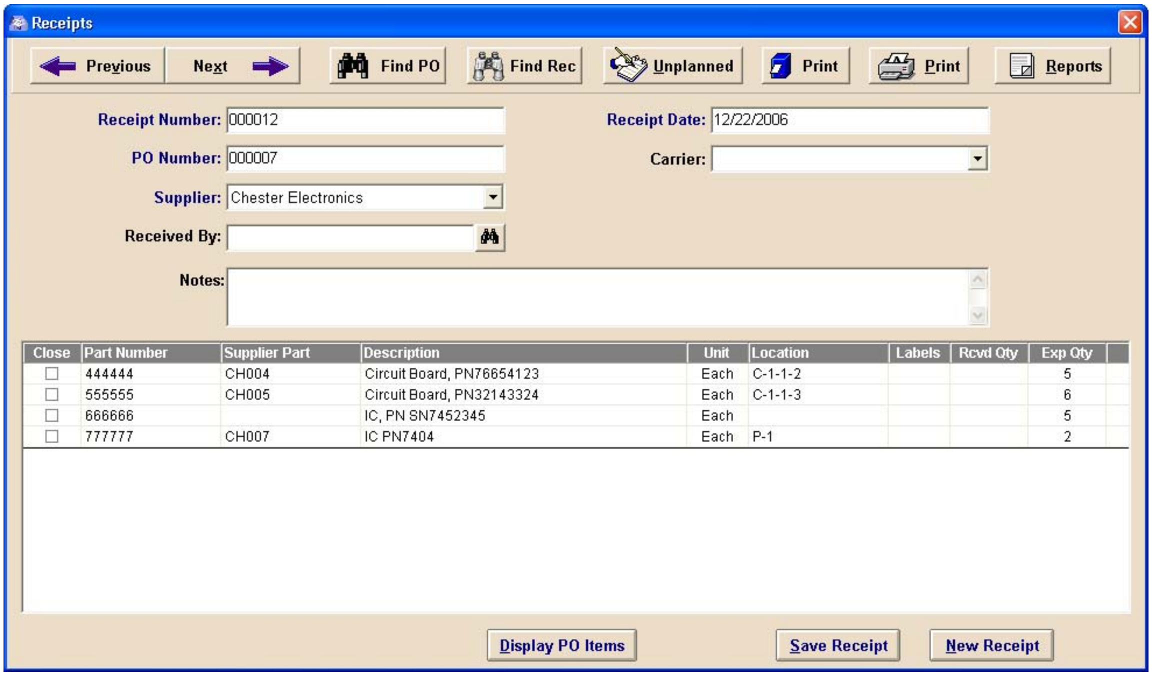


Receipts Screen

The Receipts screen provides an easy means to generate and record company receipts. You may also use this screen to view past receipt records. IMS allows unplanned receipts as well as receipts against existing purchase orders.

To view the Receipts screen, click the **Receipts** button on the WIN-IMS main button bar.

Receipts



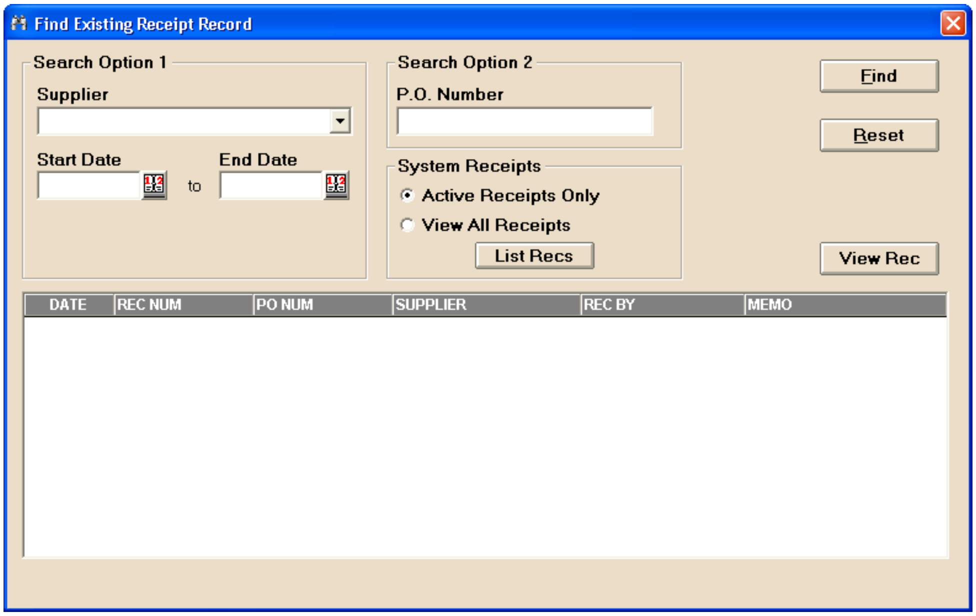
When the Receipts screen first opens, it is setup for creating a new receipt record. Only today's date has been pre-selected. This is exactly the same configuration the screen goes to when you click the **New Receipt** button, which you may click at any time.

Viewing Receipt Record information
You may view existing receipt records by clicking on the Previous, Next or Find Receipt buttons. Receipt records are stored in WIN-IMS in the order in which they were received.

The **Previous** Button
Clicking the **Previous** button displays the receipt record that was created immediately *before* the currently displayed receipt record.

The **Next** Button
Clicking the **Next** button displays the receipt record that was created immediately *after* the currently displayed receipt record.

The **Find Receipt** Button
Clicking the **Find Receipt** button will display the Find Existing Receipt Record screen (shown below). Use the Find Existing Receipt Record screen to locate, and display, any receipt record in WIN-IMS.



Search Option 1
The Search Option 1 fields allows for searching through the WIN-IMS system for receipt records that match the entered data. For example, select a supplier and all receipts for that supplier will display. Select a supplier, enter a Start Date and click the **Find** button. Only receipt records for the selected supplier created on, or after, the entered Start Date will be displayed. Enter only a Start Date and End Date and click the **Find** button. Receipt records for *all* suppliers created on, or after, the selected Start Date but before, or on, the selected End Date will be displayed.

Search Option 2
If you want to know what was received against a specific purchase order, just enter the purchase order number in the P.O. Number field and click the **Find** button. The selected Purchase Order number will be displayed. Select the item from the list and click the **View Rec** button.

The **Reset** Button
Clicking the **Reset** button will clear the Find Existing Receipt Record screen so you can conduct a new search.

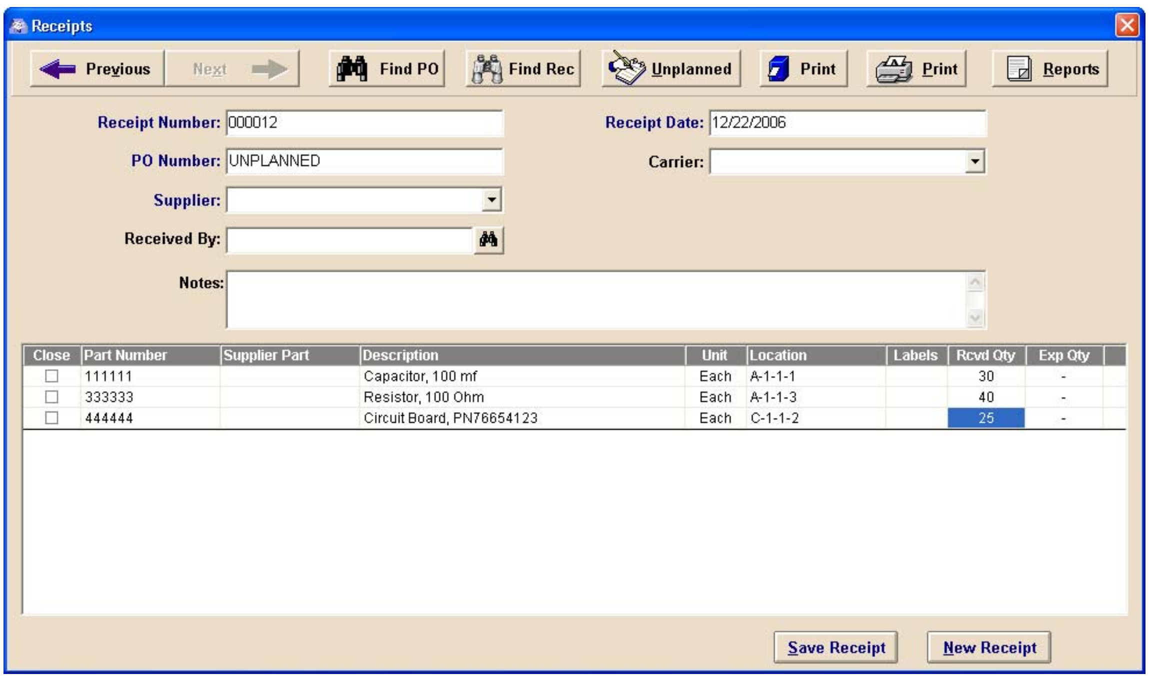
The **List Recs** Button
The **List Recs** button will display all receipt records in WIN-IMS based on the Active Receipts Only/View All Receipts option selection.

The **View Rec** Button
Select a displayed receipt record by clicking anywhere in one of the rows of the displayed receipt records list. Click the **View Rec** button to display the selected receipt record's details on the Receipts screen.

Receiving Against a Purchase Order

- Click the **New Receipt** button in the lower, right corner of the screen.
- If you know the purchase order number, enter the number in the PO Number field and press the Enter key. The PO items associated with the entered PO Number will appear in the list.
- If you do NOT know the purchase order number, click the **Find PO** button to locate the correct purchase order. Details of the Find Existing Purchase Order screen are available in the Purchase Order Screen section of this manual. Once the correct PO Number is selected, the PO items associated with the entered PO Number will appear in the list.
- Verify or modify the receipt date.
- Verify or select carrier.
- Select individual receiving order.
- Enter notes as desired.
- Enter the received quantity and the number of barcode labels you want to print (if desired) for all received items.
- Click the **Save Receipt** button when finished.

Receiving an Unplanned Receipt

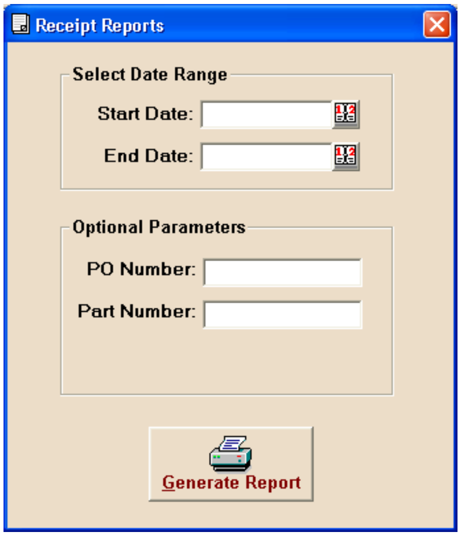


- Click the **New Receipt** button in the lower, right corner of the screen.
- Click the **Unplanned** button on the screen's main button bar. The word 'UNPLANNED' will appear in the PO Number field and a new, blank line will appear in the parts list.
- Verify or modify the receipt date.
- Select the supplier.
- Verify or select carrier.
- Select individual receiving order.
- Enter notes as desired.

- Click in the Part Number field, enter a part number and press the enter key or double-click to display the pop-up part selection list. If the part number entered is valid, the part description and units will be displayed.
- Enter the quantity received and number of labels to print.
- To add another receipt row, right click and select Add Receipt Row.
- Continue entering part numbers and quantities until you are finished.
- Click the **Save Receipt** button when finished.

Printing Receipt Items Barcodes
Enter the number of barcode labels you wish to print in the **Num Of Labels** field for the desired receipt item and click the **Print Labels** button.

Printing Receipt Record Reports
Clicking the **Reports** button will display the Receipt Reports screen (shown below). Use the Receipt Reports screen to view/print received items reports based on user selected criteria.

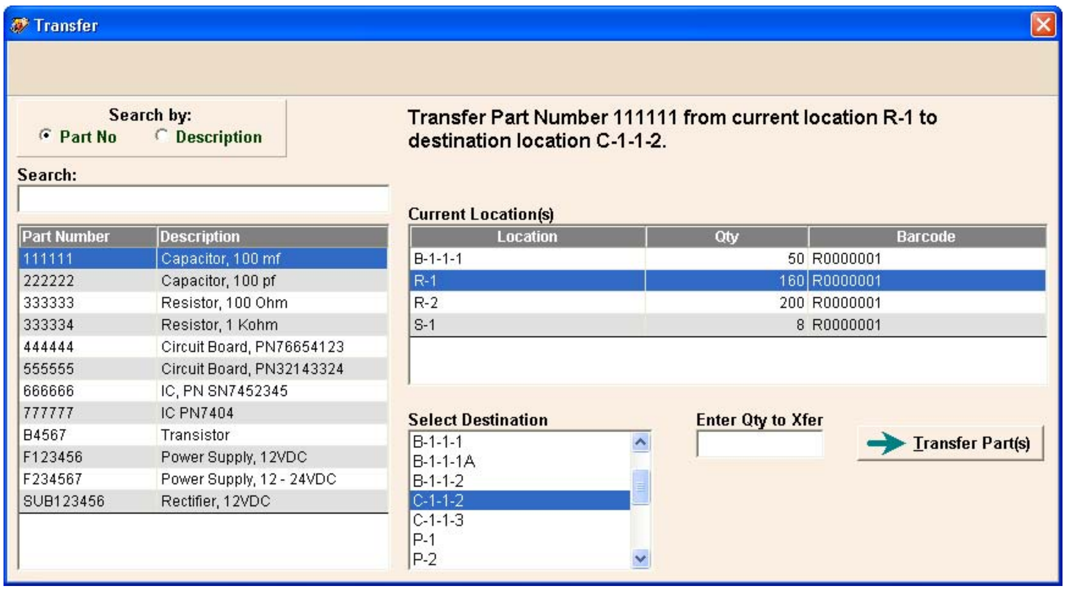


You may use any of the available filter fields to reduce the number of returned items. Use the Start Date/End Date fields to restrict the returned records to only those received during the selected dates, inclusive. You may further restrict returned records by using the Optional Parameters features.

Transfer Screen

The Transfer screen provides an easy means of transferring parts from one inventory location to another. To view the Transfer screen, click the **Transfer** button on the WIN-IMS main button bar.

Transfer



<u>Transferring Parts</u>

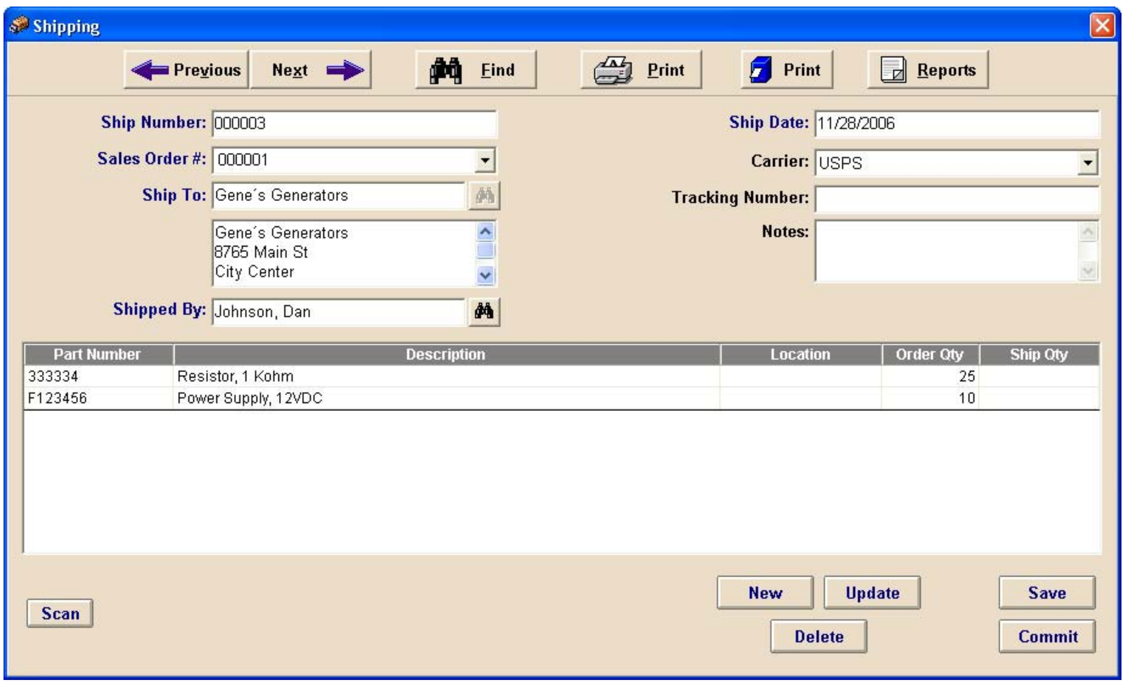
- Select the part you wish to transfer from the left-side list. A list of locations the selected part is currently located in will display in the Current Location(s) list.
- Select a location from the Current Location(s) list.
- Select a location from the Select Destination Location list.
- Enter the quantity you wish to transfer.
- Click the **Transfer Part(s)** button.

Shipping Screen

The Shipping screen provides an easy means to generate and record shipping orders. You may also use this screen to view past shipping orders.

To view the Shipping screen, click the **Shipping** button on the WIN-IMS main button bar.

Shipping



When the Shipping screen first opens, it is setup for creating a new shipping order. It has determined the next available shipping order number and set the Ship Date. This is exactly the same configuration the screen goes to when you click the **New** button, which you may click at any time.

**** Note: By default, WIN-IMS generates Shipping Order numbers counting up from 000001. If you use a specially formatted Shipping Order number, enter your number in the Shipping Number field and WIN-IMS will maintain your formatting scheme.****

<u>Viewing Shipping Order Information</u>
You may view existing shipping orders by clicking on the Previous, Next or Find buttons.

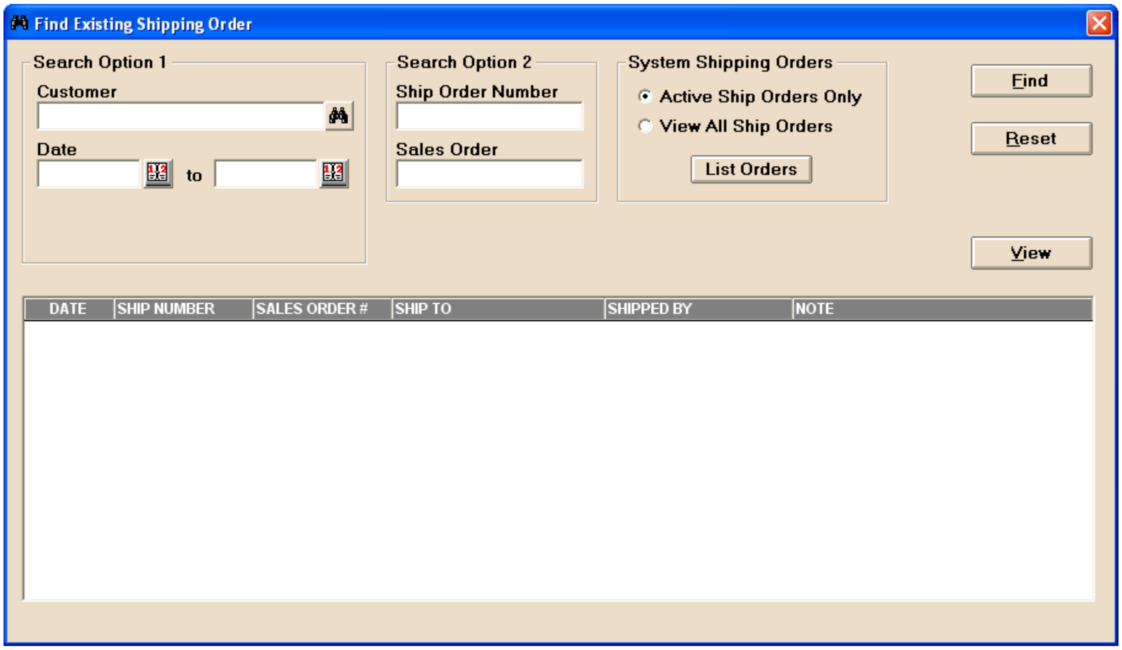
<u>The **Previous** Button</u>
Clicking the **Previous** button displays the Shipping Order created just before the currently displayed Shipping Number.

<u>The **Next** Button</u>
Clicking the **Next** button displays the Shipping Order created just after the currently displayed Shipping Number.

The **Find** Button

Clicking the **Find** button will display the Find Existing Shipping Order screen (shown below). Use the Find Existing Shipping Order screen to locate, and display, any Shipping Order in WIN-IMS.

**** Note: One of the two option choices 'Active Ship Orders Only' or 'View All Ship Orders' will always be selected. All search results will depend on the option selected. The 'View All Ship Orders' option will display both open and closed ship orders. The 'Active Ship Orders Only' will display ONLY open ship orders. ****



Search Option 1

The Search Option 1 fields allows for searching through the WIN-IMS system for Shipping Orders that match the entered data. For example, select a customer and all orders shipped to that customer will display. Select a customer, enter a Start Date and click the **Find** button. Only orders shipped to the selected customer on, or after, the entered Start Date will be displayed. Enter only a Start Date and End Date and click the **Find** button. Shipping orders for all customers shipped on, or after, the selected Start Date but before, or on, the selected End Date will be displayed.

Search Option 2

If you know the number of the Shipping Order or the Sales Order, enter it in the appropriate field in the Search Option 2 section and click the **Find** button. The appropriate Shipping Order(s) will be displayed.

The Reset Button

Clicking the **Reset** button will clear the Find Existing Shipping Order screen so you can run a new search.

The **List Orders** Button

The **List Orders** button will display all Shipping Orders it finds in WIN-IMS based on the Active Ship Orders Only/View All Ship Orders option selection.

The **View** Button
Select a displayed Shipping Order by clicking anywhere in the row of the desired Shipping Order. Click the **View** button to display the selected Shipping Order's details on the Shipping screen.

Creating a New Shipping Order
- Click the **New** button.
- You may create a Ship Order based on a previously generated Sales Order or independent of any Sales Order. If the current Ship Order is based on a Sales Order, select the appropriate Sales Order from the Sales Order # drop-down list. All items attached to the selected Sales Order will appear here. If the current Ship Order is not based on a Sales Order, make sure the Sales Order # field contains N/A.
- If empty, select the **Select Customer** button (Binoculars). Select a customer from the pop-up list that appears. The customer's address information loads into the customer's address field.
- Select the individual performing the shipment (Shipped By).
- Enter the shipment date (Ship Date).
- Select the shipment carrier (Carrier) if desired.
- Enter the shipment tracking number (Tracking Number) if desired.
- Enter a note (Note) if desired.

- The system requires that the shipping record be saved prior to adding items to be shipped in the grid. To save the shipment record, select the **Save** button.

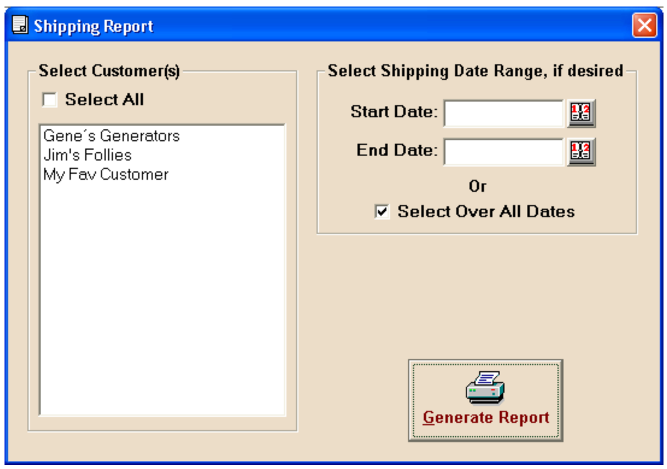
Manually entering items to ship
- If the row in question is from a sales order, right click on the row and select find inventory from the menu. A pop up list of the inventory for that item is displayed.
  - ✓ Select the inventory record to add to the shipment.
  - ✓ Adjust the quantity to add to the correct value.
  - ✓ Select the Add to shipped items button and the desired quantity in the Ship Qty column will be adjusted.
  - ✓ The added part is saved to the shipment and an inventory adjustment is made.
- If you wish to add a new part to the shipped list, right click on the grid and select **Add Row** from the menu. A new blank row is added.
  - ✓ In the part number column of the new record, double click on the column to select the part from a list of parts. Once the part is identified, the system will fill in the part description.
  - ✓ Right click on the row and select Find Inventory from the menu. A pop up list of the inventory for that item is displayed.
  - ✓ Select the inventory record to add to the shipment.
  - ✓ Adjust the quantity to add to the correct value.
  - ✓ Select the **Add to Shipped Items** button and the Ship Qty column is updated.
  - ✓ The added part is saved to the shipment, and an inventory adjustment is made.

Using a laser scanner to enter ship items
- Select the Scan button in the lower left corner of the screen. Barcode scanning is now enabled.
- Ensure that the barcode field (under the label Part # Scanning Enabled) has the focus (background is yellow). Scan the part number barcode of the item being shipped.

- The quantity of the item will default to one in the Qty field (next to the barcode). The default inventory location will be displayed in the Inventory Location dropdown list, and the quantity available at that location will be shown.
- Select a different location, if necessary, and adjust the quantity as desired, then select the **Add** button.
- If the item matches a part in the shipment list, the item will appear in the list with the quantity assigned.
- The record is saved and inventory is adjusted as it is added to the list.

Printing a Ship Record
Click the **Print** button to view a printable copy of the currently displayed Ship record.

Printing Shipping Record Reports
Clicking the **Reports** button will display the Shipping Report screen. Use the Shipping Report screen to view/print shipping reports.



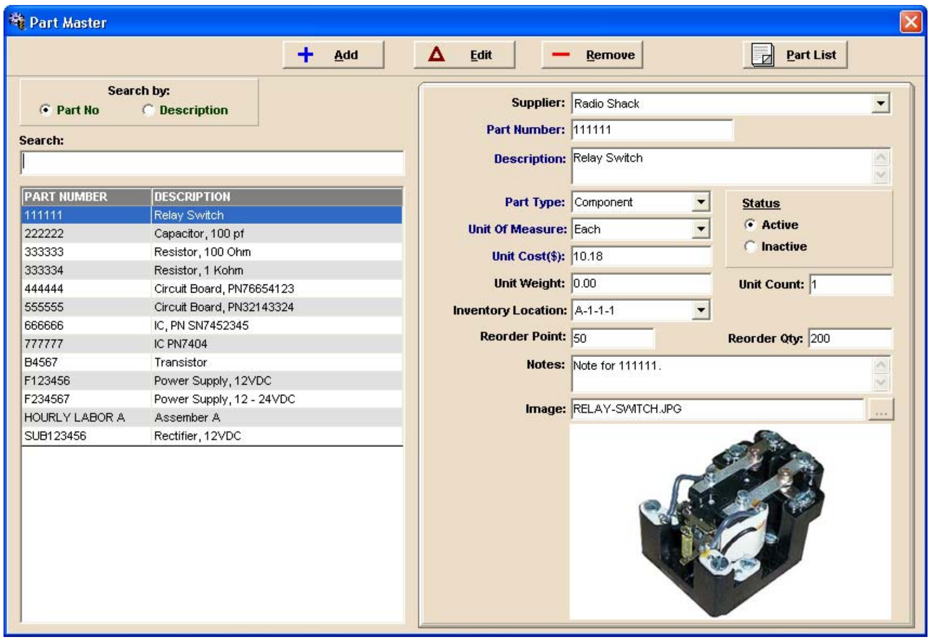
Clicking the **Generate Report** button with the Check All box checked and Select Over All Dates box checked will display all shipping records in WIN-IMS. You may select a customer, or group of customers, to reduce the number of returned records. You may also select a Start Date/End Date range to further reduce the number of returned records.

Part Master (Parts) Screen

The Part Master screen contains detailed information pertaining to the various parts used in your system and how they are used. The screen will display the detailed part information that relates to the part that is selected in the left-side parts list. Part information stored on this screen is used throughout WIN-IMS and should be carefully maintained.

To view the Part Master screen, click the **Parts** button on the WIN-IMS main button bar.

Part Master



<u>Viewing Detailed Part Information</u>
Click anywhere on a row in the left-side parts list to select a part. The detailed information relating to the selected part will be displayed on the right-side.

<u>Adding a New Part</u>
- Click the **Add** button.
- Enter the part information in the fields on the right-side of the screen. You must enter, at minimum, part information in the fields whose labels are blue. These fields are mandatory.
- An image can be displayed for each part. Images can be scanned with a document scanner or taken with a digital camera. Copy your image files to a common image folder. The default path is set to an *Images* subfolder of the *WIN-IMS Basic* folder in the *Program Files* folder. The path to the default image folder can be changed using the System Setup screen, on the File menu. To assign an image to a part, click the **Browse** button (**…**) and select an image file from the pop-up dialog box.
- Click the **Save** button when you have finished entering part information.

Editing Part Information

- Select the part whose information you wish to edit from the list on the left and click the **Edit** button.
- Enter the part information you wish to change in the fields on the right. You must enter, at minimum, part information in the fields whose labels are blue. These fields are mandatory.
- Click the **Save** button when you have finished changing part information.

Removing an Existing Part

- Select the part you wish to remove from the list on the left and click the **Remove** button. If the part is being used in the system, you will not be able to delete it.
- A message will appear asking if you are sure you wish to remove this part from the system. Answer Yes or No.
- If you answer **Yes**, the part will be removed. If you answer **No**, the part will not be removed.

Viewing a List of Parts

You may view and print a complete list of parts currently in WIN-IMS. Use the following procedure to view/print a list of parts.

- Click the **Parts List** button.
- A complete list of parts will appear. Click the **Print** button to print the list.

Inventory Screen

The Inventory screen contains detailed information regarding the current status of parts in WIN-IMS. The right half of the screen contains a tabbed control with two tabs. Clicking on the Inventory tab will display current location and quantity information that relates to the part that is selected in the left-side parts list. Clicking on the History tab will display all transactions for the selected part over the displayed date range.

To view the Inventory screen, click the **Inventory** button on the WIN-IMS main button bar.

Inventory

Viewing Current Inventory Information

Click anywhere on a row in the left-side parts list to select a part. The current inventory status relating to the selected part will be displayed on the right-side.

Adding a New Inventory Record

Generally, WIN-IMS will manage inventory information through the use of the other screens like Receipts, Transfers, and Shipping. However, you may sometimes find it necessary to manually add items to inventory.

- Click the **Add** button. A new line will be created in the right-side list.
- Enter the appropriate part information. Use the Tab key to navigate through the row. The barcode field is automatically generated and is not editable. Click the **Save** button.
- Make the desired change(s). Click the **Save** button.

Removing an Inventory Record

You may remove an inventory item any time you like.

- Select the inventory record you wish to remove.
- Click the **Remove** button. A prompt will appear asking if you're certain you wish to remove this item.
- Click the **Yes** button if want to remove the selected item. Click the **No** button if you do not.

Printing Barcodes

With the Inventory tab selected the **Print Labels** button is available. Select a part, select an inventory record, select the **Print Labels** button. If a label printer and a default receipt label are set, the system will print a receipt label based on the information in the inventory record selected.

Changing an Inventory Record's Quantity

The Cycle Stock, Issue Stock and Add Stock functions provide an easy means of changing an inventory item's quantity.

The Cycle Stock function allows you change the current quantity of the selected inventory item to the entered value.

- Enter the desired new quantity in the Qty field.
- Enter the date, if different from the displayed date, in the Date field.
- Enter the reason for the quantity change in the Reason field.
- Click the **Cycle Stock** button.

The Issue Stock function allows you to deduct the entered value from the current quantity of the selected inventory item.

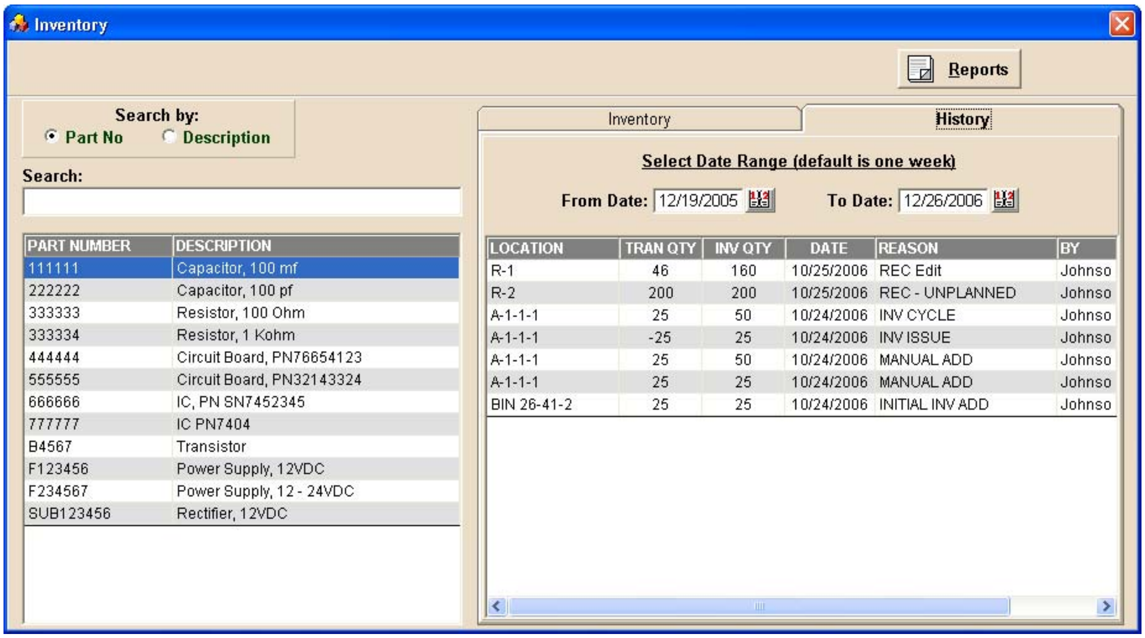
- Enter the quantity to deduct in the Qty field.
- Enter the date, if different from the displayed date, in the Date field.
- Enter the reason for the quantity change in the Reason field.
- Click the **Issue Stock** button.

The Add Stock function allows you to add the entered value to the current quantity of the selected inventory item.

- Enter the quantity to add in the Qty field.

- Enter the date, if different from the displayed date, in the Date field.
- Enter the reason for the quantity change in the Reason field.
- Click the **Add Stock** button.

Inventory History

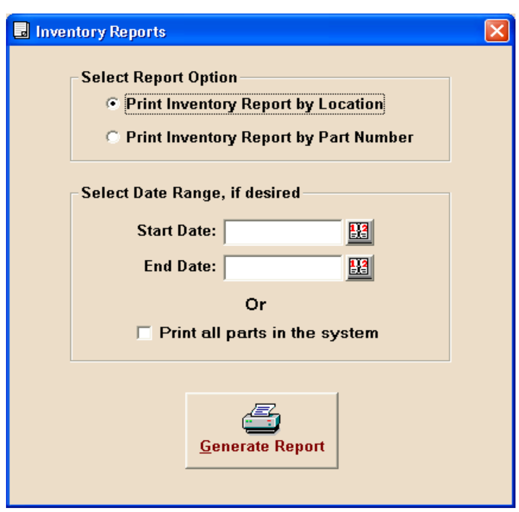


Viewing Inventory History

Click anywhere on a row in the left-side parts list to select a part. The history of the selected part will be displayed in the right-side list. Use the From Date/To Date range to select the period for viewing history information.

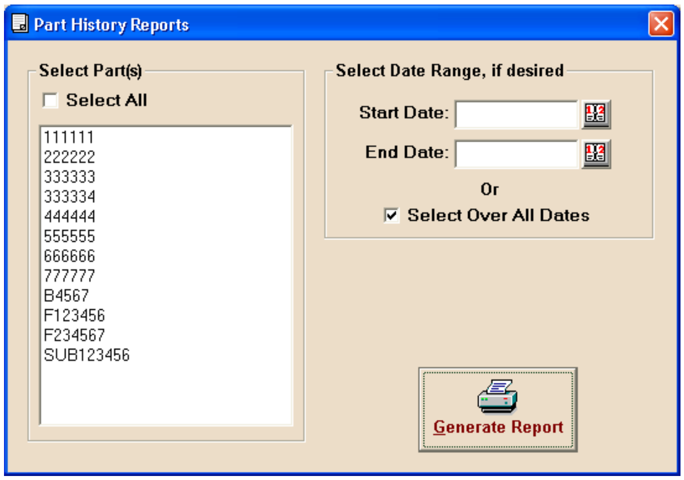
Printing Inventory Reports

Clicking the Reports button with the Inventory tab selected will display the Inventory Reports screen (shown below). Use the Inventory Reports screen to view/print the current inventory status.



Clicking the **Generate Report** button will display a printable copy of the current inventory status based upon user selections. You may print the entire inventory sorted by location or part number. To reduce the number of returned records, use the Start Date/End Date fields.

Clicking the Reports button with the History tab selected will display the Part History Reports screen (shown below). Use the Part History Reports screen to view/print the inventory history of the selected part(s).



Clicking the **Generate Report** button will display a printable copy of the entire inventory history of the selected part(s). To reduce the number of returned records, click the Check All box and select individual part(s). You may further reduce the number of returned records by using the Start Date/End Date fields.

File Menu

Logging In to WIN-IMS

The WIN-IMS Log In screen will appear whenever the system starts or a user has logged out. At this point, a user must successfully Log In to use WIN-IMS.

- Enter your system user name in the User Name field. Press the **Tab** or **Enter** key to move the cursor to the Password field.

- Enter your system password in the Password field. Press the **Enter** key, or click the **Log In** button, to log in.

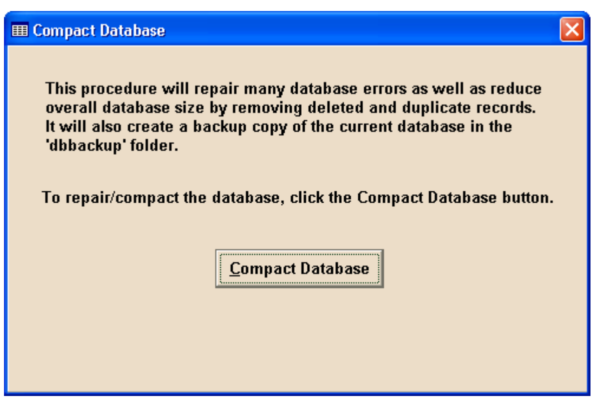
WIN-IMS will compare the entered user name and password against the stored user name and password. WIN-IMS will start with the authorized functions available for the logged in user if the values match. A prompt will appear if the values do NOT match stating your log in attempt was unsuccessful. You may either reattempt to log in by clicking the **Yes** button or exit WIN-IMS altogether by clicking the **No** button.

Changing Your User Password

The Change Password screen allows the currently logged in WIN-IMS user to change their system password. Click on the File main menu item and select Change Password to open the Change Password screen.

The steps required to change your password are…
- Enter your user name in the User Name field. Press the **Enter** key.
- Enter your current password in the Password field. Press the **Enter** key.
- Enter your new password in the New Password field. Press the **Enter** key.
- Enter your new password again for verification. Press the **Enter** key.

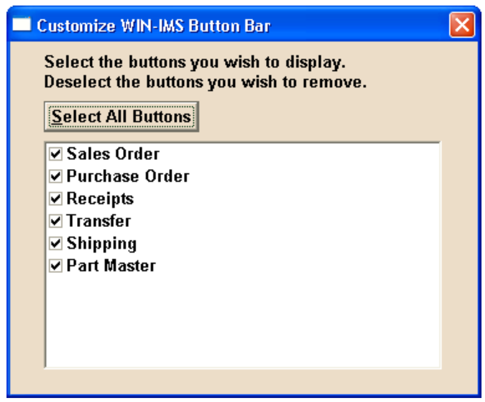
Compacting the WIN-IMS Database



The Compact Database function will repair many minor database errors as well as reduce overall database size by removing deleted and duplicate records. It will also create a backup copy of the current database and save it in the 'dbbackup' folder in the WIN-IMS directory. Click on the File main menu item and select Compact Database to open the Compact Database screen.

Click the **Compact Database** button. The screen will automatically close when finished.

Customizing the Button Bar

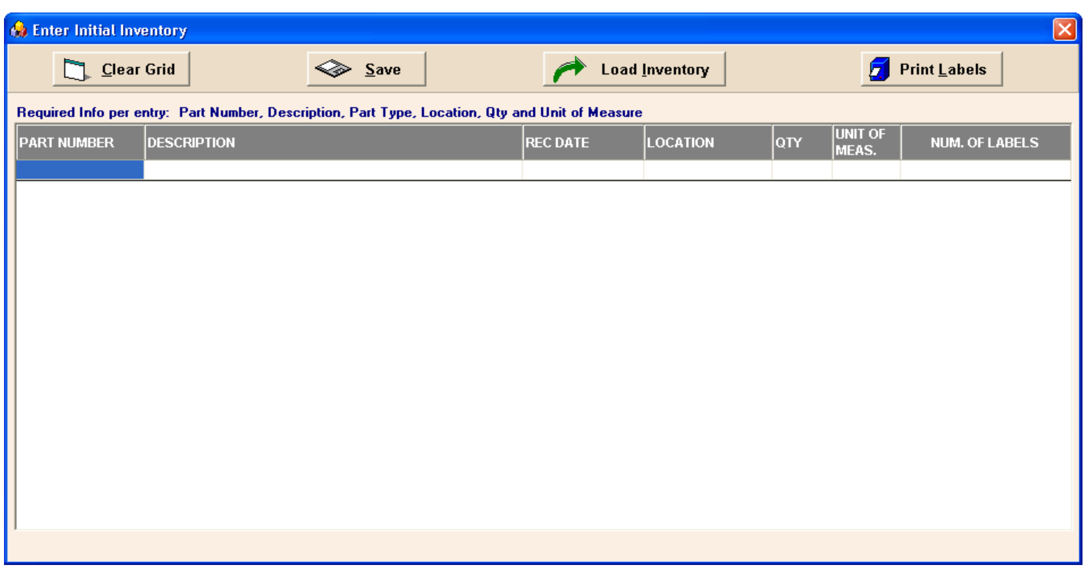


The Customize WIN-IMS Button Bar screen is provided to enable an IMS user to control the number of buttons displayed on the IMS main button bar. The Customize WIN-IMS Button Bar will list all of the main functions the currently logged-on user is authorized to use. A check in the box next to the button indicates it is displayed on the main button bar and available to the user. Clearing the check will remove the corresponding button from the main button bar and make it unavailable for use.

Click on the File main menu item, and select Customize Button Bar to open the screen.

Enter Initial Inventory Screen

Click on the File main menu item, and select Enter Initial Inventory to open the screen.



The Enter Initial Inventory screen can be used to enter inventory items into the part master and inventory tables at the same time. It is not necessary to use this screen. It will only collect the bare minimum information necessary to enter parts into the system. This information can then be edited on the Part Master to complete the details. Part number, description, part type, and unit of measure are required fields for each item entered. The part types and units of measure must be entered on their respective screens before attempting to use this screen.

To use, enter a part number in the Part Number field. Press the Tab or Enter key on the keyboard to advance to the next cell. Complete the remaining fields for this item. If the Qty cell is left blank, IMS will automatically enter one (1) as the default quantity when the **Save** button is pressed. The Num. Of Labels cell can be left blank at this time. When the cursor is in the Num. Of Labels column, press the Tab or Enter key to add a new line, and continue adding information. You can also right click in the grid and select Add Row to add a blank line to the grid.

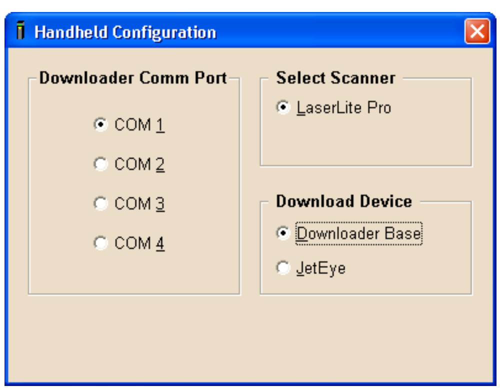
Click the **Save** button when you have finished entering information.

Labels can be printed from this screen at any time if Receipt labels have been previously designed and saved (see instructions for the Label Design screen later in this document). The **Load Inventory** button will load all parts currently in inventory into the grid. Information cannot be edited in this mode. To print labels, enter the number of labels to be printed for each part in the Num. Of Labels column. Then click the **Print Labels** button.

Handheld Configuration Screen

The Handheld Configuration screen is used to set the communication parameters for the handheld scanner and/or to load the scanner application onto the scanner. This version of WIN-IMS currently supports the Videx LaserLite Pro scanner.

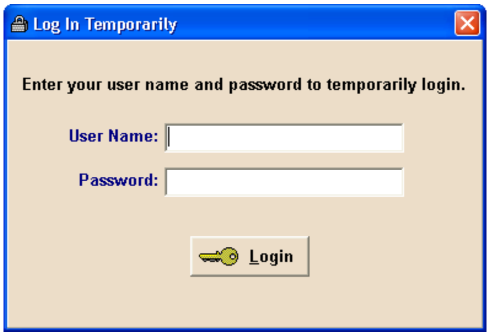
To view the Handheld Configuration screen, click the File menu item and select Handheld Configuration.



Select the COM port (serial port) that the scanner base is connected to. The settings will be saved on the computer.

The scanner application is loaded when the reference file is loaded onto the scanner for the physical count function (see Physical Count screen later in this manual).

Log In Temporarily



The Log In Temporarily function was created to allow an authorized WIN-IMS user to log in to the system from any workstation already running WIN-IMS without having to log out and log back in again. Click on the File main menu item and select Log In Temporarily to open the Log In Temporarily screen.

To log in temporarily:

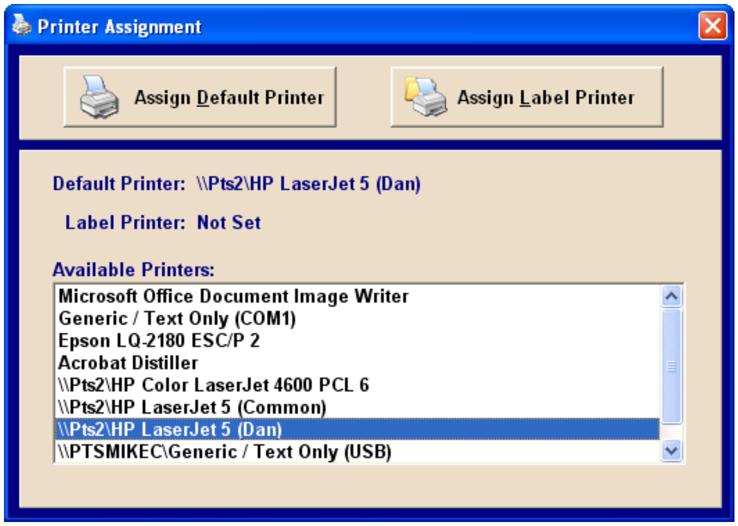
- Enter your user name in the User Name field. Press the **Enter** key.
- Enter your password in the Password field. Press the **Enter** key.

Upon successful log in, you will immediately notice that the WIN-IMS button bar background color changes to red and a Log Out button appears next to the Quit button. These changes make it easy to tell that someone has used this function to log in temporarily. You may now operate WIN-IMS with the same access as if you had originally logged in yourself. When you are finished, click the **Log Out** button to restore WIN-IMS to the level of access of the original user.

Log Out of WIN-IMS

The Log Out of WIN-IMS function allows the currently logged in user to log out and disable WIN-IMS without completely shutting down the application. In this state, a user may simply enter his user name and password to restart WIN-IMS. Click on the File main menu item and select Log Out of WIN-IMS.

Printer Assignment Screen

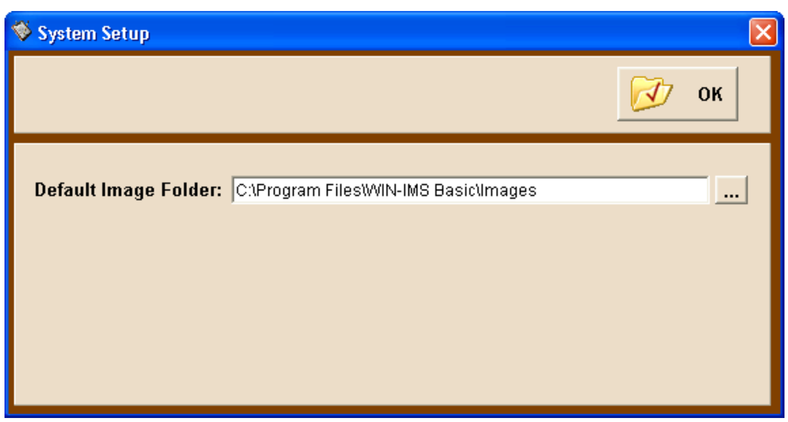


The Printer Assignment screen allows for the setting of the default report and label printers in WIN-IMS. Click on the File main menu item and select Printer Assignment to open the Printer Assignment screen.

Initially, both printers will show Not Set. Simply select a printer from the Available Printers list and click the appropriate button. There is no Save button. Printer settings will be saved when you click the **Assign** button.

System Setup Screen

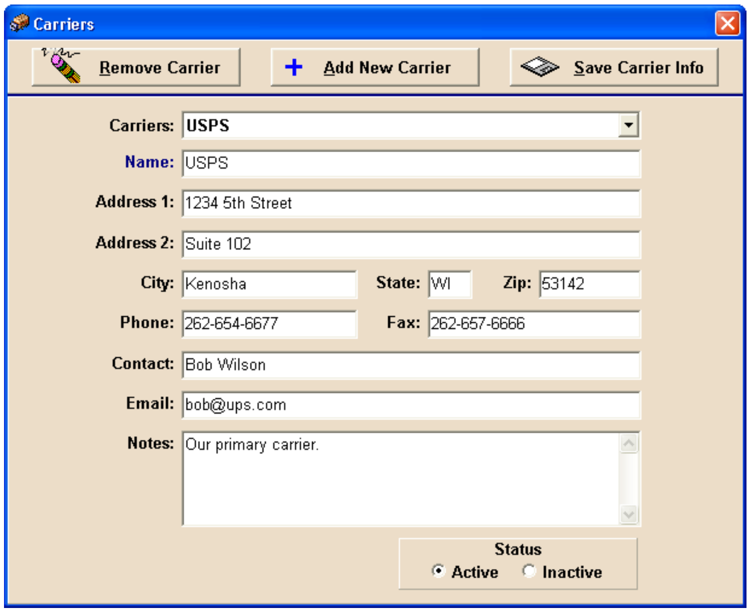
Click on the File main menu item, and select System Setup to open the screen.



The System Setup screen is used to set the path to the Default Image Folder. Images can be assigned to parts and viewed in the Part Master. Images can be scanned with a document scanner or taken with a digital camera. The default path is set to an *Images* subfolder of the *WIN-IMS Basic* folder in the *Program Files* folder. If your images are stored in a different folder, change the image path by clicking on the **Browse** button (**…**) and selecting an image file in the desired folder from the pop-up dialog box. Then click the **OK** button to save the path.

Support Menu

Carriers Screen



The Carriers screen manages information relating to the companies you use to receive/transport goods. Carrier information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item and select Carriers to open the Carriers screen.

Viewing Carrier Information
Click the button on the right side of the Name field. An alphabetical list of all carriers previously entered into the system will appear. From the list, click on the carrier whose information you wish to view. The selected carrier's information will be displayed.

Editing Carrier Information
You may, at any time, change carrier information or add missing information. Simply place the cursor in the appropriate field and enter the new information. Click the **Save Carrier Info** button when finished.

Adding a New Carrier
Click the **Add New Carrier** button. Enter the name of the carrier in the Name field. The Name field is the only field on this screen that must contain information before clicking the **Save Carrier Info** button (mandatory). A mandatory field has a blue label. Press the Tab key to navigate to the next field. Continue adding carrier information, as desired, using the Tab key to navigate through the fields. Click the **Save Carrier Info** button when finished.

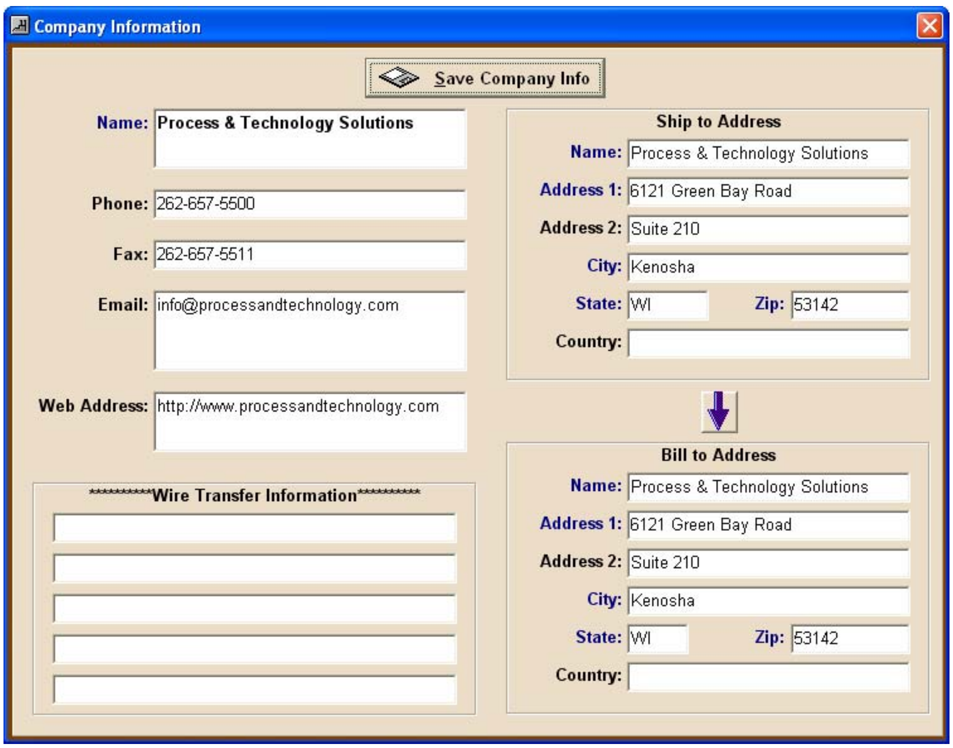
Removing a Carrier
Select the carrier you wish to remove. Click the **Remove Carrier Info** button. If the carrier is used in shipping, the system will not allow it to be deleted. If OK, a prompt will appear asking if you're sure

you want to permanently remove the displayed carrier. Clicking the **Yes** button will remove the carrier. Clicking the **No** button will return you to the carrier screen without removing the carrier.

Inactivating a Carrier

As previously stated, carrier information is used on various screens and reports throughout WIN-IMS. There may come a time, however, when you would like to keep a carrier from being made available to those screens and reports without removing them from WIN-IMS. Clicking on the **Inactive** button will inactivate the selected carrier making it unavailable to other WIN-IMS functions without permanently removing it from the system. Clicking on the **Active** button will reactivate the selected carrier.

Company Information Screen

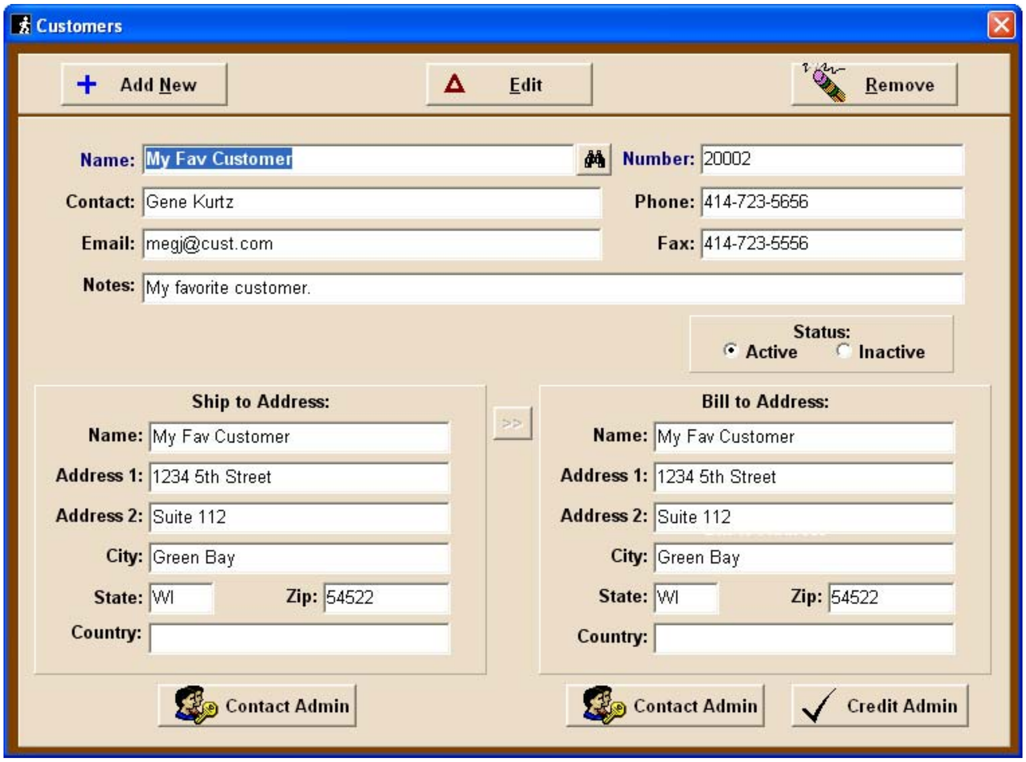


The Company Information screen manages information relating to your company. Company information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item and select Company Information to open the Company Information screen.

Editing Company Information

You may, at any time, change company information or add missing information. Simply place the cursor in, or use the Tab key, to the appropriate field and enter the new information. Click the **Save Company Info** button when finished.

Customers Screen



The Customers screen manages information relating to your customers. Customer information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item and select Customers to open the Customers screen.

<u>Viewing Customer Information</u>
Click the **Select Customer** button (Binoculars) on the right side of the Name field. An alphabetical list of all customers previously entered into the system will appear. From the list, click on the customer whose information you wish to view. The selected customer's information will be displayed.

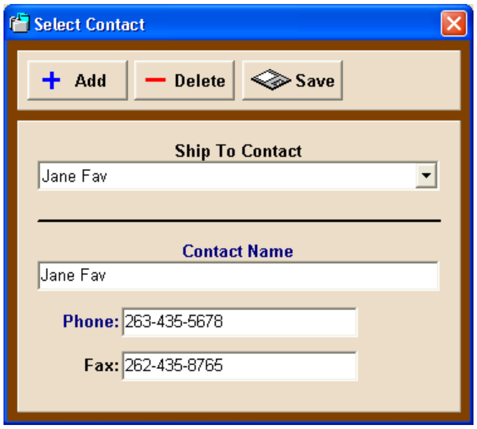
<u>Editing Customer Information</u>
Select the customer you wish to change. Select the **Edit** button. Change customer information or add missing information. Click the **Save** button when finished.

<u>Adding a New Customer</u>
Click the **Add New** button. Enter the name of the customer in the Name field. The Name field is the only field on this screen that must contain information before clicking the Save Customer Info button (mandatory). A mandatory field has a blue label. Press the Tab key to navigate to the next field. Continue adding customer information, as desired, using the Tab key to navigate through the fields. Click the **Save** button when finished.

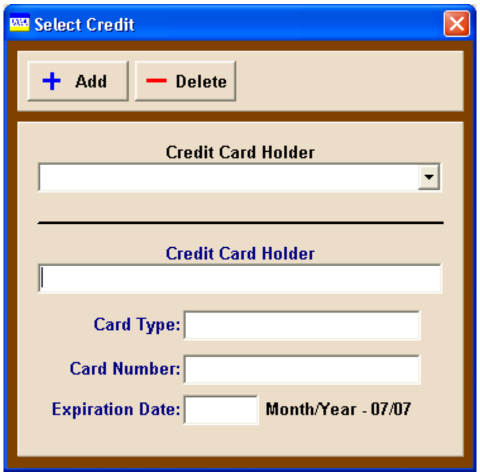
Removing a Customer
Select the customer you wish to remove. Click the **Remove** button. If the customer is being used in the shipping or sales order processes, the system will not allow it to be deleted. If OK, a prompt will appear asking if you're sure you want to remove the customer. Clicking the **Yes** button will remove the customer. Clicking the **No** button will return to the customer screen without removing the customer.

Inactivating a Customer
As previously stated, customer information is used on various screens and reports throughout WIN-IMS. There may come a time, however, when you would like to keep a customer from being made available to those screens and reports without removing them from WIN-IMS. Clicking on the **Inactive** button will inactivate the selected customer making it unavailable to other WIN-IMS functions without permanently removing it from the system. Clicking on the **Active** button will reactivate the customer.

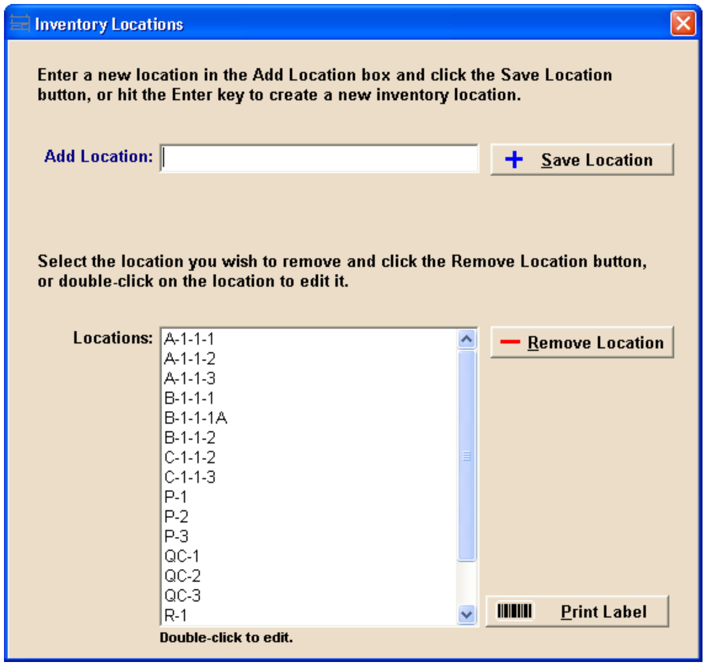
Contact Administration
Contact administration will allow individuals to be attached to the ship to or bill to portion of a customer. Select the **Contact Admin** button under the Bill To or Ship To section. The form below will be displayed. Contacts may be added, removed or edited from this screen.



Credit Administration
Credit administration will allow credit card information to be tied by individual to the bill to customer. Credit card information may be added, removed or edited from this screen.



Inventory Locations Screen



The Inventory Locations screen manages information relating to your inventory locations. Inventory location information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item and select Inventory Locations to open the Inventory Locations screen.

<u>Adding a New Inventory Location</u>
Enter the name of the inventory location in the Add Location field. Click the **Save Location** button.

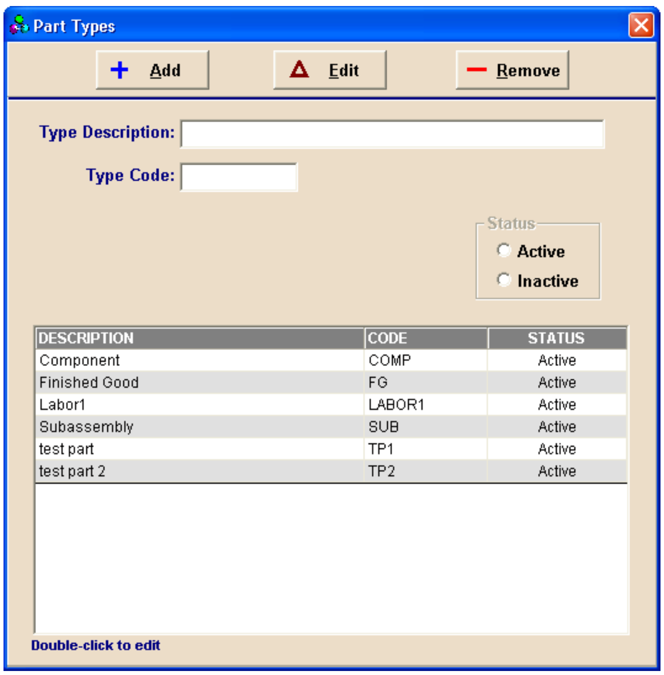
<u>Editing an Inventory Location</u>
Double-click an inventory location in the Locations list. Enter the change in the Edit Location field. Click the **Save Location** button.

<u>Removing an Inventory Location</u>
Click on the inventory location you wish to remove in the Locations list. Click the **Remove Location** button. If the location is being used in receipt, inventory, cycle count, or shipping the system will not allow it to be removed. If OK, a prompt will appear asking if you're sure you want to remove the location. Clicking the **Yes** button will remove the location. Clicking the **No** button will return to the location screen without removing the location.

Printing Location Labels
Before a location label can be printed, a location label must be designed and set as the default label (see label design later in this manual). In addition, a label printer must be assigned in the printer assignment process.

Select the locations to be printed (multiple locations may be selected by using the control or shift keys, or by dragging the mouse across the locations). Select the **Print Label** button. One label for each location selected will be printed on the designated label printer.

Part Types Screen



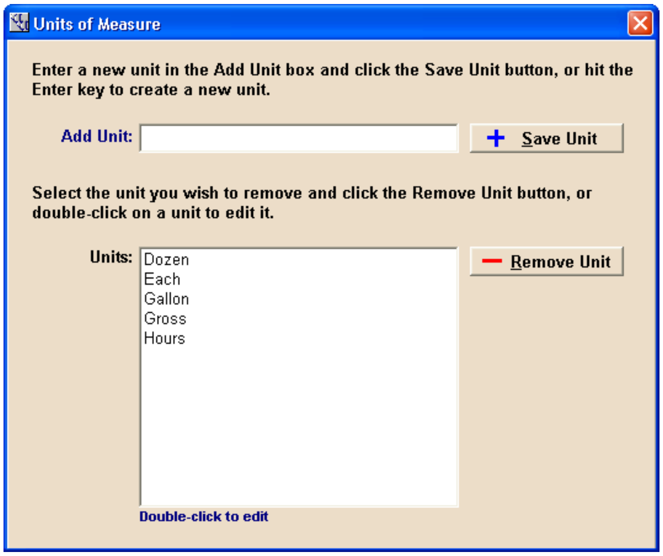
The Part Types screen manages information relating to how parts are categorized in the system. Part type information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item, scroll down to Part Information and select Part Types to open the Part Types screen.

Adding a New Part Type
Click the **Add** button. Enter the new part type in the Type Description field. Press the **Tab** key. Enter a type code in the Type Code field. Select the part type (Component is the default). Click the **Save** button.

Editing a Part Type
Select the row in the list that contains the part type information you wish to edit (change) and click the **Edit** button. Or simply double-click the row. Make the desired changes in the fields and boxes above the list. Click the **Save** button.

Removing a Part Type
Select the row in the list that contains the part type information you wish to remove. Click the **Remove** button. If the part type is assigned to a part the system will not allow it to be removed. If OK, a prompt will appear asking if you're sure you want to remove the part type. Clicking the **Yes** button will remove the part type. Clicking the **No** button will return to the part type screen without removing the part type.

Units of Measure Screen



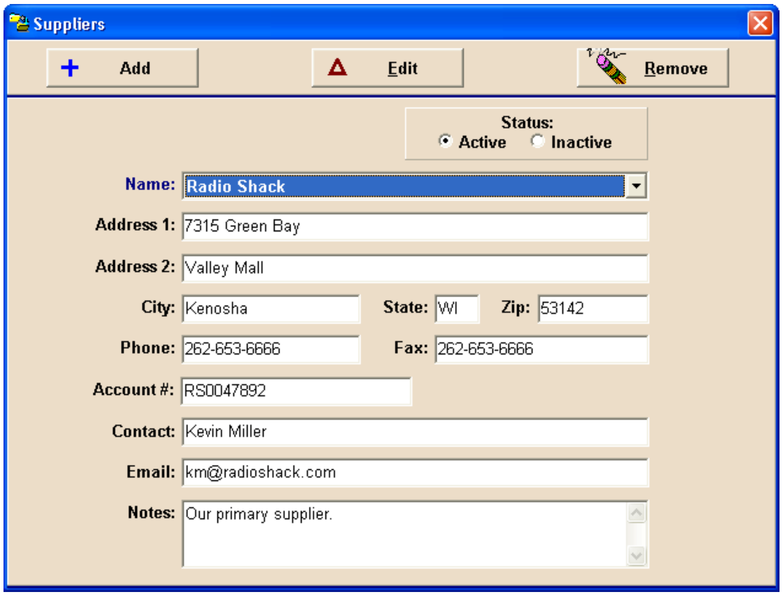
The Units of Measure screen manages information relating to system units of measure information. Unit of Measure information is used on various screens and reports throughout WIN-IMS. Click on the Support main menu item, scroll down to Part Information and select Units of Measure to open the Units of Measure screen.

Adding a New Unit of Measure
Enter the new unit of measure in the Add Unit field and click on the **Save Unit** button, or you may hit the **Enter** key to add the new unit of measure.

Editing an Unit of Measure
Double-click a unit of measure in the units list. Enter the change in the Edit Unit field. Click the **Save Unit** button.

Removing a Unit of Measure
Select the unit of measure from the Units list and click the **Remove Unit** button. If the unit is assigned to a part the system will not allow it to be removed. If OK, a prompt will appear asking if you're sure you want to remove the unit. Clicking the **Yes** button will remove the unit. Clicking the **No** button will return to the units screen without removing the unit.

Suppliers Screen



The Suppliers screen manages information relating to the suppliers you use to purchase goods. Click on the Support main menu item and select Suppliers to open the Suppliers screen.

<u>Viewing Supplier Information</u>
Click the button on the right side of the Name field. Select a supplier from the list of all suppliers. The selected supplier's information will be displayed.

<u>Editing Supplier Information</u>
Select the desired supplier. Select the **Edit** button. Change supplier information or add missing information. Click the **Save** button when finished.

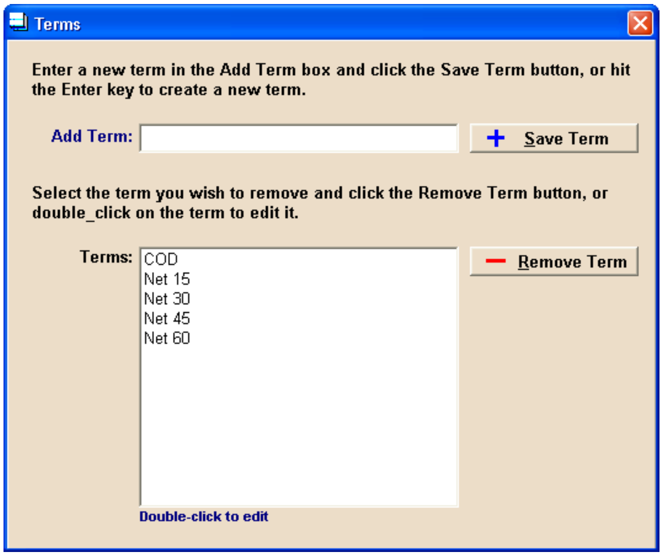
<u>Adding a New Supplier</u>
Click the **Add** button. Enter the name of the supplier in the Name field. The Name field is the only field on this screen that must contain information before clicking the Save button (mandatory). A mandatory field has a blue label. Continue adding supplier information, as desired. Click the **Save** button when finished.

<u>Removing a Supplier</u>
Select the supplier you wish to remove. Click the **Remove** button. If the supplier is being used in the purchase order, receipt, part or quality control processes the system will not allow it to be removed. If OK, a prompt will appear asking if you're sure you want to remove the displayed supplier. Clicking the **Yes** button will remove the supplier. Clicking the **No** button will return you to the supplier screen without removing the supplier.

<u>Inactivating a Supplier</u>
There may come a time when you would like to keep a supplier from being made available without removing them from WIN-IMS. Clicking on the **Inactive** button will inactivate the selected supplier

making it unavailable to other WIN-IMS functions. Clicking on the **Active** button will reactivate the selected supplier.

Terms Screen



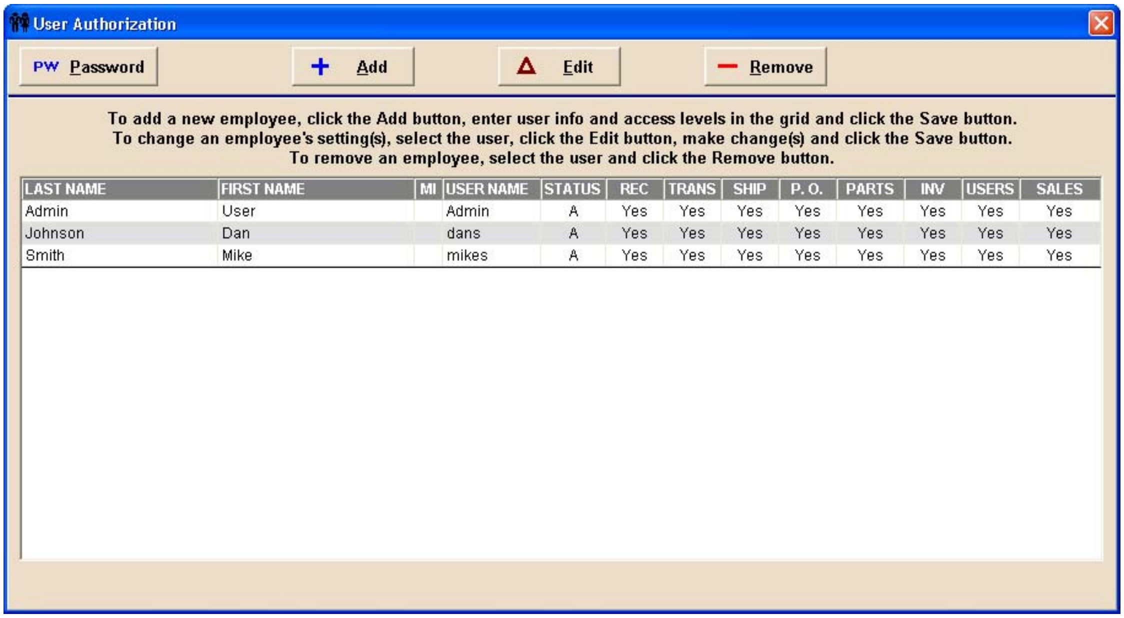
The Terms screen manages information relating to the various purchase/sales terms used in your system. Click on the Support main menu item and select Terms to open the Terms screen.

<u>Adding a New Term</u>
Enter the new term in the Add Term field and click on the **Save Term** button, or you may hit the **Enter** key to add the new term.

<u>Editing a Term</u>
Double-click a term in the Terms list. Enter the change in the Edit Term field. Click the **Save Term** button.

<u>Removing a Term</u>
Select the term from the Terms list and click the **Remove** Term button. If the term is being used in the purchase order or sales order processes the system will not allow it to be removed. If OK, a prompt will appear asking if you're sure you want to remove the term. Clicking the **Yes** button will remove the term. Clicking the **No** button will return to the Terms screen without removing the term.

User Authorization Screen.



The User Authorization screen is used to manage employee access to WIN-IMS and system functions. Click on the Support main menu item and select User Authorization to open the User Authorization screen.

A user must be listed on this screen with a valid User Name and Password in order to successfully Log In to WIN-IMS. At Log In, the user will have to enter his User Name and Password on the Log In screen. The values entered will be compared with the values stored on this screen. WIN-IMS will start if the values match.

Employee status can be A (Active) or I (Inactive). Inactive employees may not use the system and may not be selected for future functions.

All of the major WIN-IMS functions are also protected by values set on this screen. Three values are available for each major function. They are… Yes – full access, View – view only and No – no access.

<u>Adding a New User</u>
Click the **Add** button. A new line in the users grid is created and the password field appears at the bottom of the screen. Last Name, First Name, User ID, and Password are required to be entered to save the record. The status field uses the Enter key, or double-click, to change values from I to A, and back. The function fields e.g.. Receipts, Transfer, Prod, etc. use the Enter key or double-click to change values from Yes to No to View.

Click the **Save** button when finished entering this user's information to permanently store the values in WIN-IMS. Click the **Cancel** button if, for some reason, you wish to cancel entering the new user.

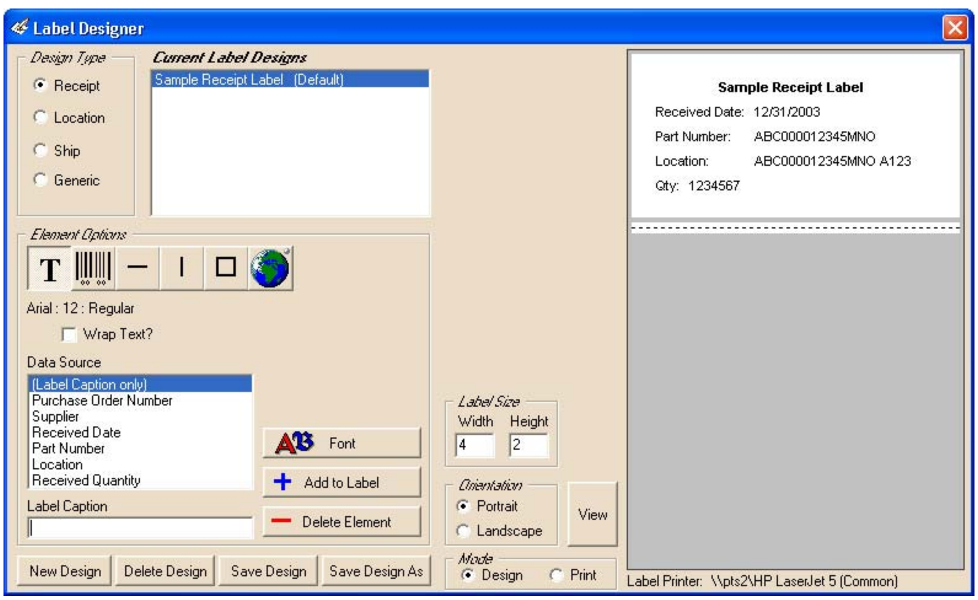
Editing a User's System Settings
Select the desired user. Select the **Edit** button. Make the desired change(s). To save the changes, select the **Save** button. To leave without saving the changes, select the **Cancel** button.

Removing a User
Select the desired user. Click the **Remove** button. A prompt will appear asking if you are sure you wish to remove this user. Click the **Yes** button if you want to remove this user. Click the **No** button if you do NOT want to remove this user

Viewing/Editing a User's System Password
Select the desired user. Click the **Password** button. The selected user's password will appear on the bottom of the screen along with two buttons: **Save Password** and **Cancel Password**. Enter a new password in the password field and click the **Save Password** button if you wish to edit (change) the existing password. Click the **Cancel Password** button if you do NOT wish to edit the existing password.

Label Menu

Label Design Screen



The Label Design screen provides the ability to custom design labels for use by WIN-IMS.

Custom labels are designated as one of four types:

1. Receipt labels are used by the Receipts screen,
2. Location labels are used by the Location screen,
3. Ship labels are used by the Shipping screen, and
4. Generic labels are printed from the label design screen.

To design a label, first select the design type.

The Data Source List will contain the possible fields that may be included in the label. The list on the example contains the possible data sources for a container label.

The current label design list will contain any labels that have already been created for the design type. When one of these labels is selected, the box on the right will display the label design, as indicated above for the Sample Receipt Label.

To create a new label, select the Design type and then select New Design button. Set the label size (Width and Height in inches). Set the label orientation (Portrait or Landscape). For Portrait, the height is vertical on the screen. For Landscape the Height is Horizontal on the screen.

There are 6 different elements that may be placed on the label. They are from left to right: text, barcode, horizontal line, vertical line, box, and a graphic.

<u>Adding a Text Element</u>
Select the Text button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. To set the font style and size, click the Font button. Click the Add to Label button. The text element will appear in the upper left corner of the label design. Drag it to the desired position on the label.

To edit the text caption or font after a text element has been placed in a label design, right click on the element and choose the option desired.

<u>Adding a Database Field Text Element</u>
In the Data Source box, select the desired database field. To set the font style and size, click the Font button. Click the Add to Label button. A sample of the data will appear in the upper left corner of the label design. Drag it to the desired position on the label. When the label is printed, the actual data for that field will be printed on the label.

To edit the text caption or font after a database field text element has been placed in a label design, right click on the element and choose the option desired.

<u>Adding a Barcode Element</u>
Select the Barcode button in the Element Options panel. Select (Label Caption only) in the Data Source box, and type a label caption in the Label Caption textbox. Select the barcode font and size desired. Click the Add to Label button. The text will be added to the label in the barcode font. Drag it to the desired position on the label.

If a database field is needed as a barcode, select the field from the Data Source box, and add it to the label. When the label is printed, the actual data for that field will be printed on the label as a barcode.

<u>Adding a Horizontal Line Element</u>
Select the Horizontal Line button in the Element Options panel. Click the Add to Label button. A horizontal line segment will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the right end of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

Adding a Vertical Line Element

Select the Vertical Line button in the Element Options panel. Click the Add to Label button. A vertical line segment will be added to the label design in the upper left-hand corner of the label. Drag it to the desired position on the label. To change the size of the line, place the mouse cursor over the bottom of the line. When the cursor changes to a double arrow, click and drag the endpoint to the desired length.

Adding a Box Element

Select the Box button in the Element Options panel. Click the Add to Label button. A box will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. To change the size of the box, place the mouse cursor over the lower right-hand corner of the box. When the cursor changes to a double arrow, click and drag the endpoint to the desired size.

Adding a Graphic Element

Select the Graphic button in the Element Options panel. Click the Find Graphic File button to find a file on your computer to place on the label. File types supported are bmp, gif, jpg, wmf, and ico. Click the Add to Label button. The graphic will be added to the label design in the upper left-hand corner. Drag it to the desired position on the label. Graphic elements are not resizable.

Deleting a Label Element

Select the element to be deleted from the label design. Click the Delete Element button, or press the Delete key on the keyboard. Elements can also be deleted by right-clicking on the element and selecting Delete from the popup menu.

Deleting a Label Design

To delete an entire label design, select the design from the Current Label Designs list. Click the Delete Design button at the bottom of the screen.

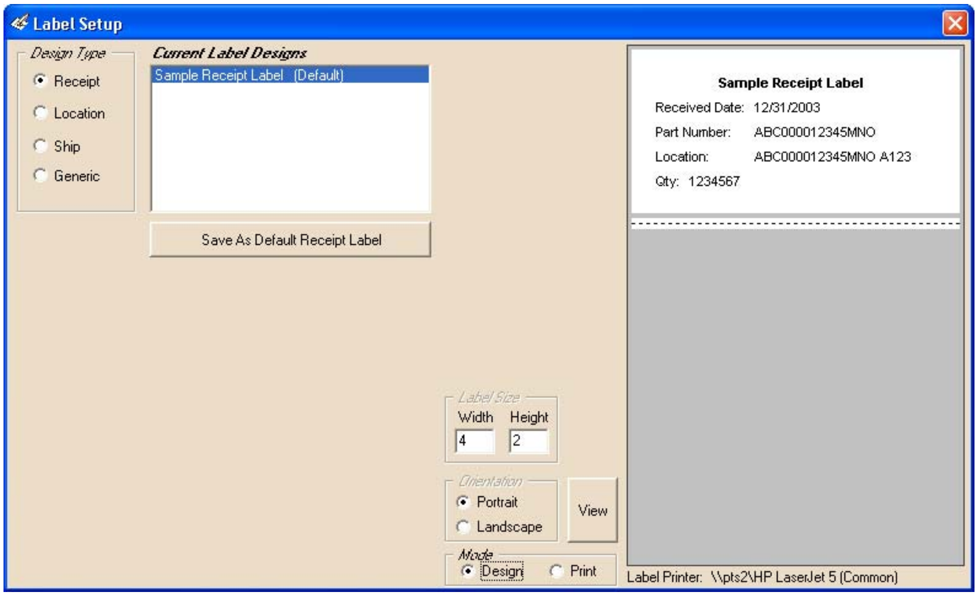
Save an Existing Design as a New Design

Time may be saved by copying an existing label design and modifying it. Select the design from the Current Label Designs list, and click the Save Design As button at the bottom of the screen. Enter a new design name and click the OK button. Design names must be unique.

Viewing/Printing a Label

The work space on the right-hand side of the screen provides a feel for how your label will print. If you need to view exactly how your label will print, click on the View button with the Mode setting set to Design. An exact replica of the label will appear. To print the label on your label printer, change the Mode setting to Print, enter the number of labels you want to print and click the Print button.

Label Setup Screen



The Label Setup screen is provided to assign an existing label as the default label for the selected Design Type. That is, if an existing label is assigned as the default for the Receipt type, that label will be printed any time a receipt label is requested by the program.

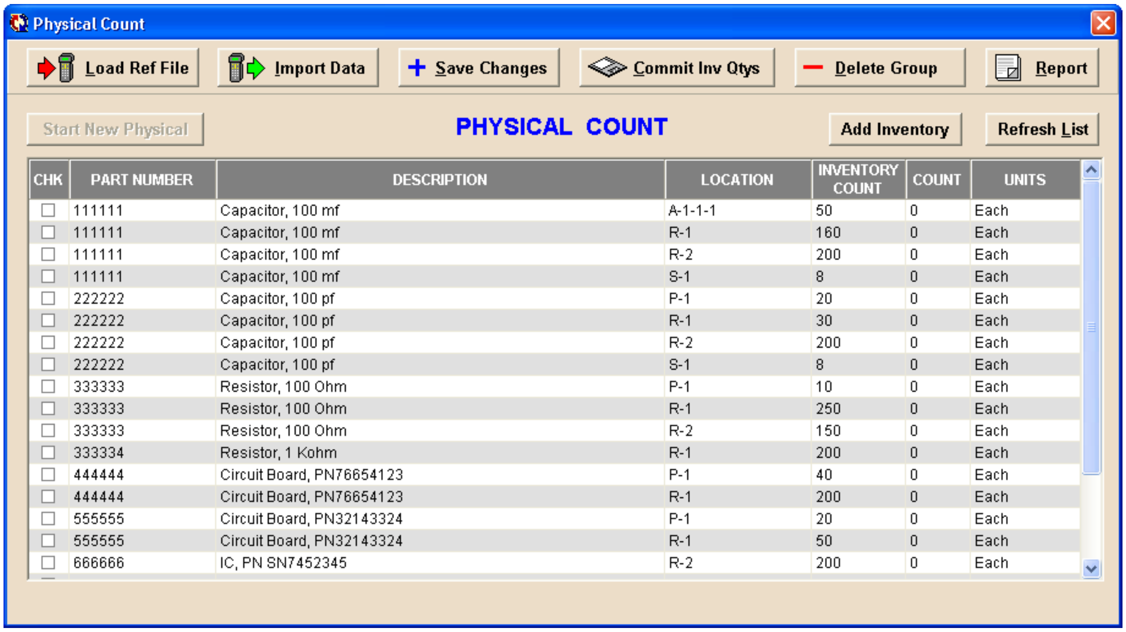
To save a label design as default for a specified process, select the Design Type (process), and select the label design from the Current Label Designs list. Then select the Save as Default button.

When a label is set as the default label, the word "Default" will appear after the label design.

Inventory Count Menu

Physical Count Screen

Use the Physical Count screen to manage physical count information. Click on the Inventory Counts main menu item, and select Physical Count to open the screen.



<u>Performing A Physical Count</u>

Use the **Start New Physical** button to display all parts in inventory with a positive quantity. Use the **Load Ref File** button to transfer this information to the handheld scanner. The user can now take the scanner out to the warehouse and count inventory.

After the count is completed, download the data from the scanner. On the Physical Count screen, click the **Import Data** button. Follow the file transfer instructions for your particular handheld scanner. After the files are processed, the group will appear on the screen.

If the physical count matches the inventory count, the checkbox in the first column will be checked. If the count does not match, the checkbox will not be checked, and the part number/bar code and physical count will be displayed in red. These items can then be verified.

**** Note: If an item is counted more than once, the physical counts will be added together. This may be the cause for a count mismatch, and would need to be verified. ****

If the physical count value is correct, IMS will check the checkbox in the first column. If the physical count value is not correct, it can be changed in the grid by selecting it with the mouse and entering a different value. Then check the checkbox in the first column. Click the **Save Changes** button to save the changes. When the **Commit Inv Qtys** button is clicked, the inventory quantities will be changed to the physical count values for all items that have the checkbox checked. Items that are not checked will not be changed.

Removing A Physical Count Group
From the Physical Count screen, click the **Delete Group** button. If there is a physical group in the count table, a confirmation box will be displayed. Responding 'Yes' to the message will display a second confirmation message. Responding 'Yes' to the message will delete the group from the count table.

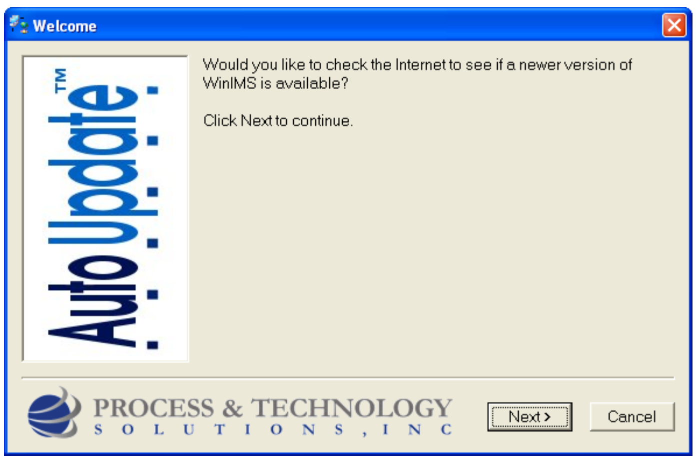
Help Menu

Help

Will display the help file for the program.

Check for Update

Will go the PTS web site and check for a newer version of the program executable. This process is only available to individuals signed on as Admin User. In order for this to be accomplished, all users except the individual searching for the update must be out of the program. When Check for Update is selected the screen below is displayed.



Select cancel to stop the process. Click next to continue. Follow the screen prompts. On completion, the system will have found a newer version of the program and installed it or not. In either case the program has been restarted and the user will have to log back in.

About Win IMS

Will display the form below, which has pertinent information about WIN-IMS.