WIN STS

Stores Tracking System
User Manual
Version 3

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Welcome!

Thank you for purchasing WIN-STS! WIN-STS offers ease-of-use and dependability for companies with consumable materials including medical services, repair centers, field service organizations and more.. This User's Manual is designed to help you get going quickly and be ready to use WIN-STS as soon as possible. It covers our standalone Access version along with our network Microsoft Access™ and Microsoft SQL Server™ versions. Access installations are quick and easy for anyone with a reasonable understanding of Windows operating systems. SQL Server is licensed separately and is best installed by someone knowledgeable in working with SQL Server administrative functions.

WIN-STS Hardware Installation

Several hardware options are available from PTS that can work with WIN-STS. Even though the more basic units shown offer the same functionality as advanced systems, there are several reasons you should discuss your needs with us before proceeding. Enhanced speed, performance and durability is available for both the handhelds and printers shown.

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. Mobile licensing is provided with each unit purchased from PTS.

Handheld PDAs (Optional)
The Windows Mobile/CE handheld also functions as the data collection device for the check-out of items. These devices connect 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-STS handheld application. Mobile licensing is provided with each unit purchased from PTS.

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-STS should then match the size of label used. See the Printer Driver Configuration section that follows.

PC Corded Barcode Scanner (Optional)
A corded barcode can be used to scan check-out and check-in data directly into WIN-STS. 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.

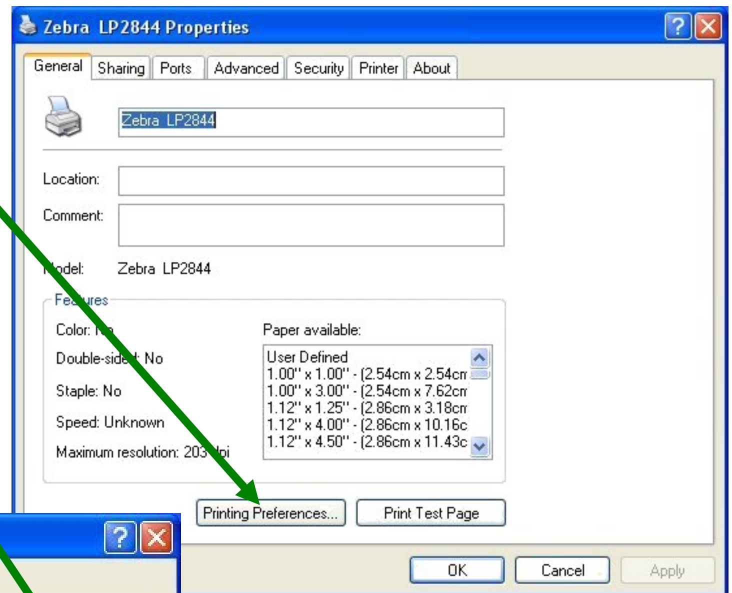
For special needs and support, contact PTS within the warranty period or as a part of your Extended Support Agreement.

Zebra Printer Driver Configuration

Each Zebra printer provided with many our software systems offers excellent performance at a reasonable price. For documentation, Zebra includes both quick installation and a full user's manual on the CD provided with the printer. The challenge is that print driver setup information is more difficult to find and first-time users need to understand the unique issues to configure the driver properly.

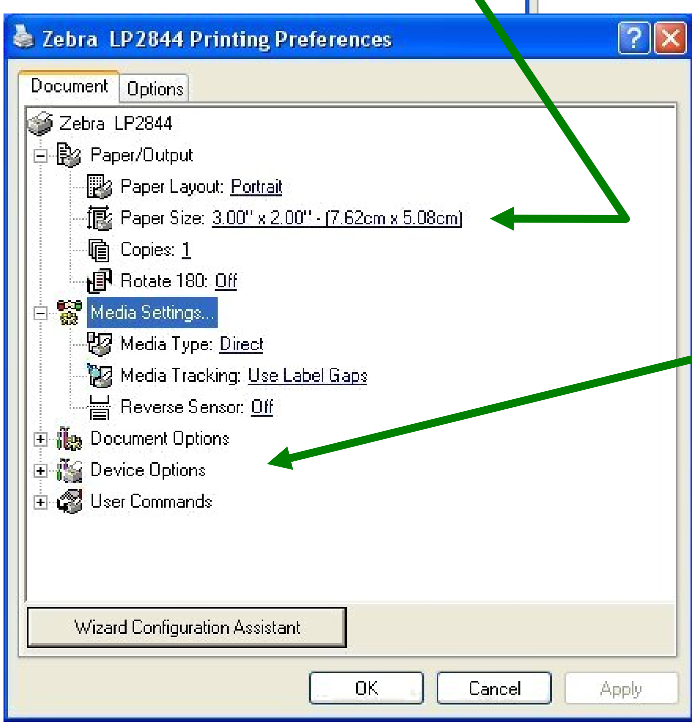
Configuring the Zebra Print Driver
Zebra's print driver is standard across most of their desktop and tabletop products. Familiarize yourself with the driver by opening the Printers and Faxes option on the Start-Settings menu and highlighting the Zebra Print Driver.

By right-clicking the driver, you can then select Properties and the dialog box will appear as shown. To proceed, select the Printing Preferences option button shown on the General tab of the box.



Make sure to change the Paper Size to the size to match that of the label inserted into the Zebra Printer.

NOTE: If the label size you have is NOT listed, you must manually create a USER DEFINED label that matches the exact size being used in the printer!!!



Also, set the Media Type option to either Direct (direct thermal labels with no ribbon) or Thermal Transfer (standard labels that require a ribbon). LP desktop printers are Direct ONLY. TLP printers can do either mode.

Be careful! Don't change any other settings that you do not know what they will do! Read the manual for any questions. Make sure to "Apply" your setting changes and exit.

Datalogic Memor Installation

Overview

The latest in handheld computer technology adds new power and flexibility in collecting data. Microsoft Windows Mobile and CE platforms are now the industry standard and offer a more standardized platform for all users. “Batch” handheld computers store data in memory and must be docked to a PC workstation to download the data on a periodic basis. For Windows XP, ActiveSync provides the communications between your Windows PC workstation and the handheld computer. Those with Vista PCs must use Microsoft’s Mobile Device Center. Each of these applications is free from Microsoft’s website.

NOTE: Use alternate instructions for other brands and models of the handheld computer terminal.

Microsoft ActiveSync Installation (For Windows XP)

As noted, Microsoft ActiveSync provides the communications between your Windows PC workstation and the handheld computer. Follow the instructions below to perform the installation BEFORE you plug the USB cable into the handheld.

Locate a copy of the latest version of ActiveSync for your computer system. The correct version is available from Microsoft’s WEB site or a copy is included on your CD. Version 4.5 is the latest from Microsoft as of this printing.
Look for the installation file (i.e. activesync_setup.msi) and run it. We recommend that you follow the installation instructions and accept the standard default settings during your install.
Leave ActiveSync running to install and connect your handheld computer.

Connecting and Installing your Handheld Computer

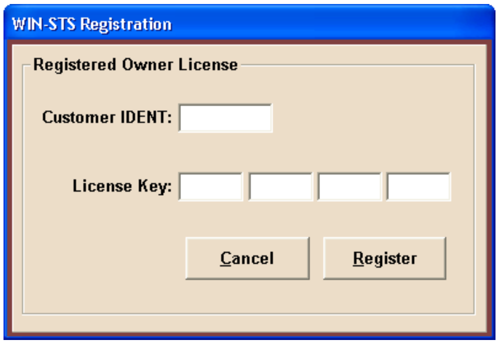
PLEASE, refer to the installation procedures included with your handheld BEFORE proceeding further. Below, we will provide general instructions for installation of the Datalogic Memor – our standard handheld computer provided with our system bundles. Other handheld options are available and will likely follow similar steps for installation.

BEFORE connecting for handheld computer to a host USB port for the first time, you must install the USB driver provided with the handheld computer on your PC. This will likely be include on a CD-ROM or downloaded from the WEB. Complete the driver installation as instructed during the installation procedure. (NOTE: Some handheld models may not require a driver to be loaded. Refer to the installation instructions.)
Connect the USB cable to your PC and the handheld or docking station (if provided). Windows will locate the hardware and complete the installation.
Once the connection is complete, you should be able to see the handheld computer on your PC via ActiveSync.

NOTE: Some users may use a single PC to connect multiple handheld computers to. If this is the case, it is best to setup your PC to recognize each handheld as a “Guest”. This avoids having ActiveSync loading shared data from your Outlook and other PC applications. To set all connected handhelds as a Guest, please double-click and run the provided “GuestOnly.reg” file. It will instantly update your system for future connections.

Starting WIN-STS for the first time

If you are starting WIN-STS for the first time, the Registration screen will appear.

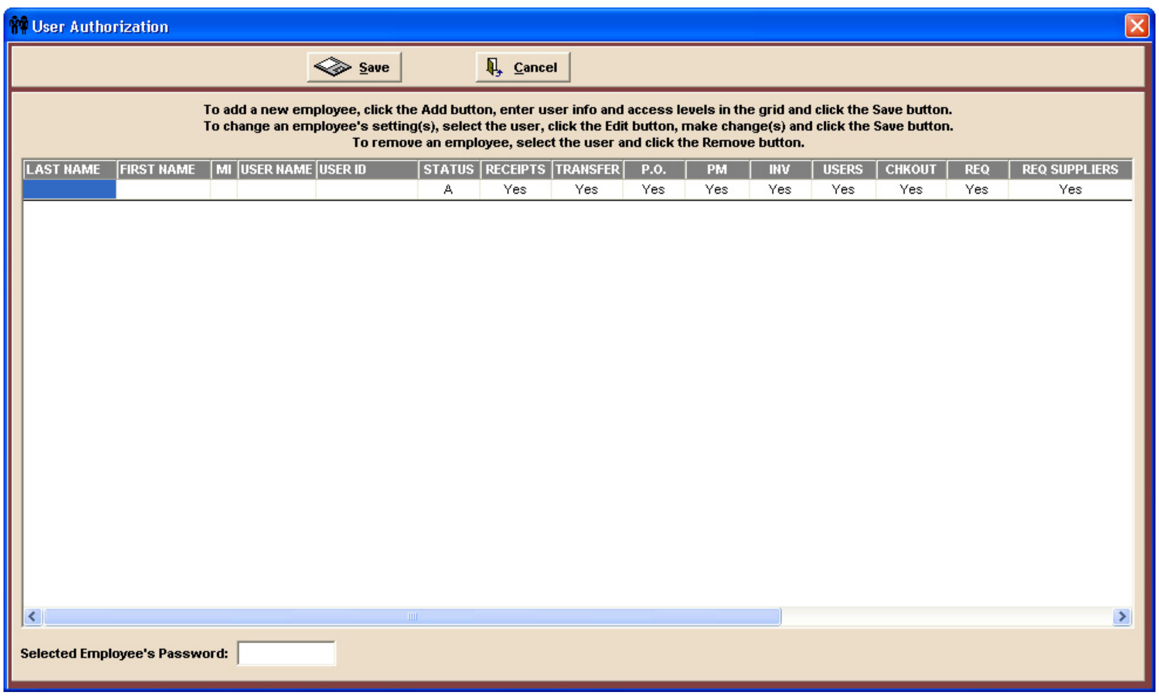


Enter the 4 character Customer Ident and 16 character License Key provided by Process and Technology Solutions. Then click the **Register** button.

The User Authorization screen will appear inside the main WIN-STS window. You will have to add at least one user before WIN-STS will operate. To add a new user…

1. Click the **Add** button. A row appears in the grid where you may enter user information.

*** ***__Note__***: *All access levels are defaulted to Yes (full access) since it is assumed you will be the system administrator. The normal default values are No (no access). You must authorize access to each function when adding new users.* ***



2. Enter your Last Name, First Name, Middle Initial, User Name and User ID information in the grid fields.
3. Enter the Password you wish to use in the Employee's Password field at the bottom of the screen. Passwords are optional and can be omitted. If more than one user will use the application, it is recommended that all users have a unique password.
4. Click the **Save** button to save user information.

Congratulations! You have added the first user to WIN-STS with full system access. Remember your User Name and Password. You will need both the next time you start WIN-STS.

You may now add additional users by following steps 1 – 4 above, if desired. Or you may enter WIN-STS by clicking the **X** in the upper right corner of the User Authorization screen. If you choose, you may close out of WIN-STS completely by clicking the **X** in the upper right corner of the main window.

Using the User Authorization screen

The User Authorization screen is used to manage employee access to WIN-STS and system functions. Click on the File 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-STS. 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-STS will start if the values match.

Users that will be checking out items from inventory also must be added to the system on this screen. The User ID is used in the check out procedures to identify the person that is checking out the items, and is a required field.

All of the major WIN-STS 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.

Buttons available on this screen are Password, Add, Edit and Remove.

Adding a New User

Click the **Add** button to add a new user to the system. When clicked, the Add button will create a new line in the users grid. Type the last name of the new user in Last Name field. Use the Tab key to move to the First Name field. Type the first name and press the Tab key again to move to the middle initial field. Continue entering user information in this manner. When you get to the function fields, i.e. Receipts, Transfer, etc., use the Enter key (or double-click) to change values from Yes, No and View.

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

Editing a User's System Settings

First, select the user whose information you wish to edit by clicking anywhere in the grid row for that user. Click the **Edit** button. Click in the field that contains the information you wish to change. Make the change(s).

Click the **Save** button when finished changing this user's information to permanently store the change(s) in WIN-STS. Click the **Cancel** button if, for some reason, you wish to cancel editing the user's information.

Removing a User

First, select the user you wish to remove by clicking anywhere in the grid row for that 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

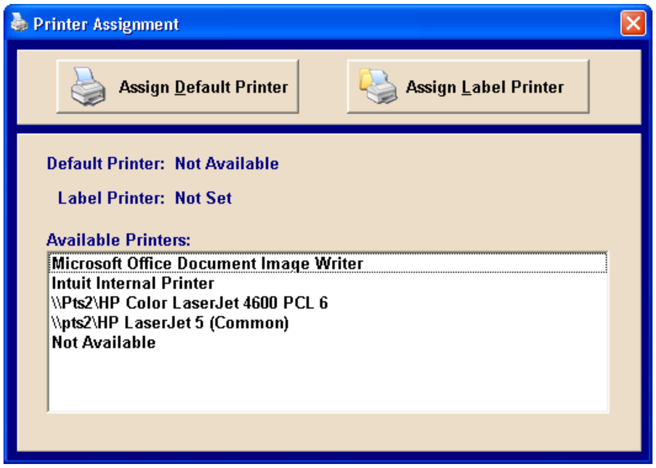
First, select the user whose password you wish to view/edit by clicking anywhere in the grid row for that user.

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.

Click the **X** in the upper right corner of the User Authorization screen to close.

Printer Assignment Screen

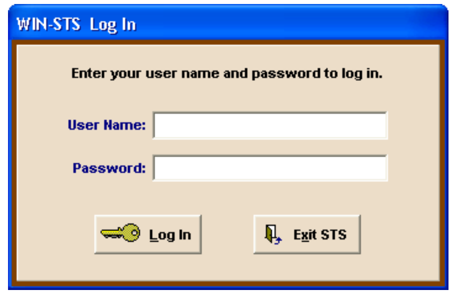
The Printer Assignment screen allows for the setting of the default report and label printers in WIN-STS. Click on the File main menu item, and select Printer Assignment to open the Printer Assignment screen.



Initially, The Default Printer will show Not Available and the Label Printer 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.

Logging In to WIN-STS

The WIN-STS 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-STS.



- 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-STS will compare the entered user name and password against the stored user name and password. WIN-STS 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-STS altogether by clicking the **No** button.

Of course, you may close WIN-STS by clicking the **Exit STS** button.

Changing Your User Password

The Change Password screen allows the currently logged in WIN-STS 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…

1. Enter your user name in the User Name field. Press the **Enter** key.
2. Enter your current password in the Password field. Press the **Enter** key.
3. Enter your new password in the New Password field. Press the **Enter** key.
4. Enter your new password again for verification. Press the **Enter** key.

**** **Note**: Remember your new password. You will need it the next time you log in to WIN-STS. ****

You cannot use this screen to remove a password. Only an administrator can remove an existing password on the User Authorization screen.

Log In Temporarily

The Log In Temporarily function was created to allow an authorized WIN-STS user to log in to the system from any workstation already running WIN-STS, 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…

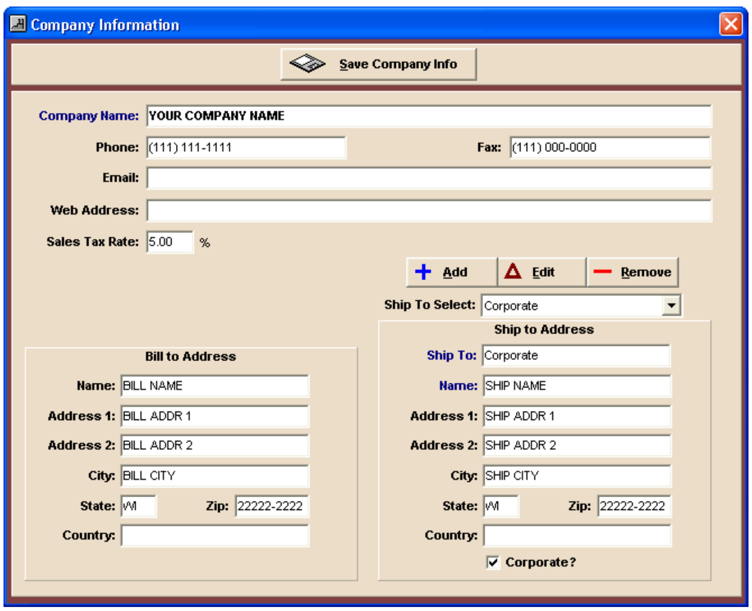
1. Enter your user name in the User Name field. Press the **Enter** key.
2. Enter your password in the Password field. Press the **Enter** key.

Upon successful log in, you will immediately notice that the WIN-STS banner 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-STS with the same access as if you had originally logged in yourself. When you are finished, click the **Log Out** button to restore WIN-STS to the level of access of the original user.

Log Out of WIN-STS

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

Company Information Screen



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

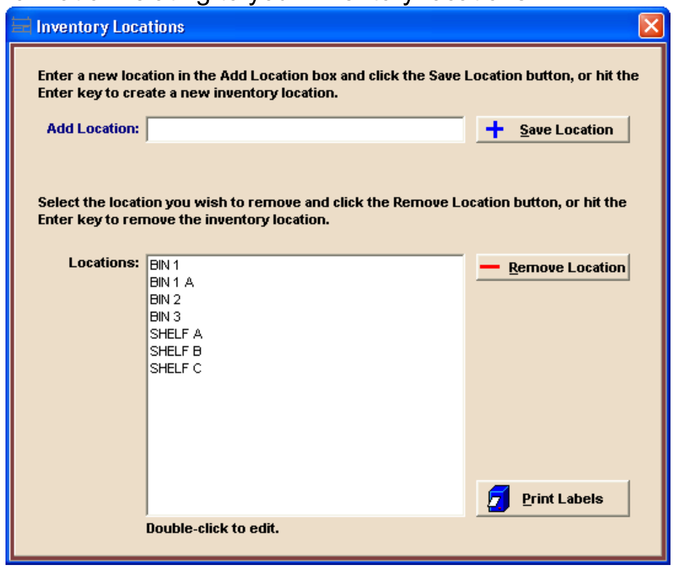
The **Bill to Address** and **Ship to Address** information is used on the Purchase Order screen. You can have as many Ship To addresses as necessary. Click the Add button to add a new Ship to address. The **Ship To** information will appear in the dropdown list after the Save button is clicked.

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 tab to the appropriate field, and enter the new information. Click the **Save Company Info** button when finished.

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-STS. Click on the Support main menu item, and select Inventory Locations to open the Inventory Locations screen.



Adding a New Inventory Location

Enter the name of the inventory location in the Add Location field. Click the **Save Location** button.

Editing an Inventory Location

Double-click an inventory location in the Locations list. Enter the change in the Edit Location field. Click the **Save Location** button.

Removing an Inventory Location

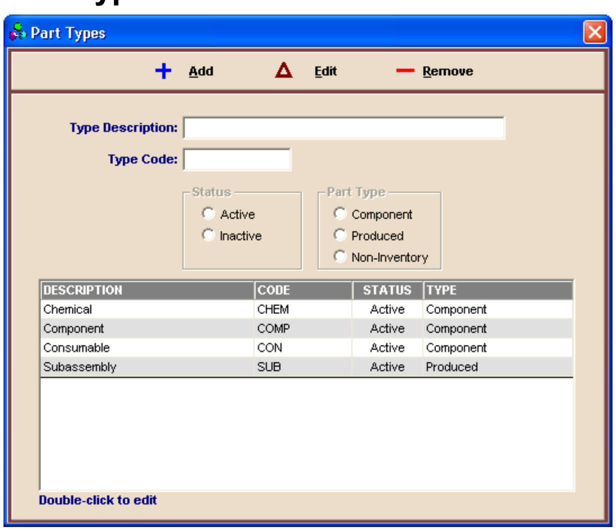
Click on the inventory location you wish to remove in the Locations list. Click the **Remove Location** button.

Printing Location Labels

If a label printer has not been assigned, go to the Printer Assignment screen on the File menu, and assign one. If a default location label design has not been set, go to the Label Setup screen on the Labels menu, and set the default Location label.

Select the locations to be printed in the list. Multiple locations can be selected by holding down the Shift or Ctrl key on the keyboard and clicking in the list. Then click the **Print Labels** button.

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-STS. 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 this type's status (Active is the default). Select the part type (Component is the default). Click the **Save** button.

Editing a Part Type

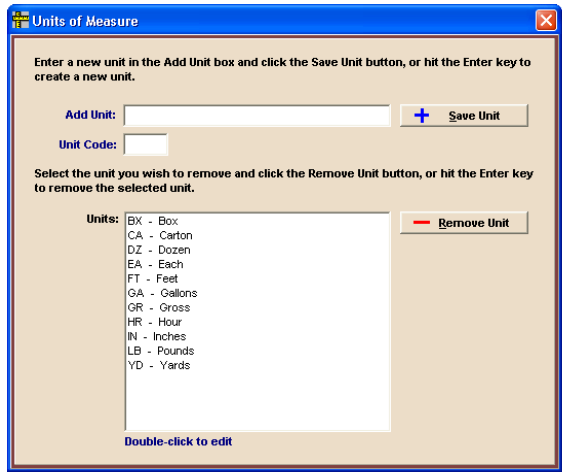
Select the row in the list that contains the part type information you wish to edit (change) and click the Edit button. Or simply double-click the row. Make the desired changes in the fields and boxes above the list. Click the **Save** button.

Removing a Part Type

Select the row in the list that contains the part type information you wish to remove. Click the **Remove** button.

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-STS. Click on the Support main menu item, scroll down to Part Information and select Units of Measure to open the Units of Measure screen.



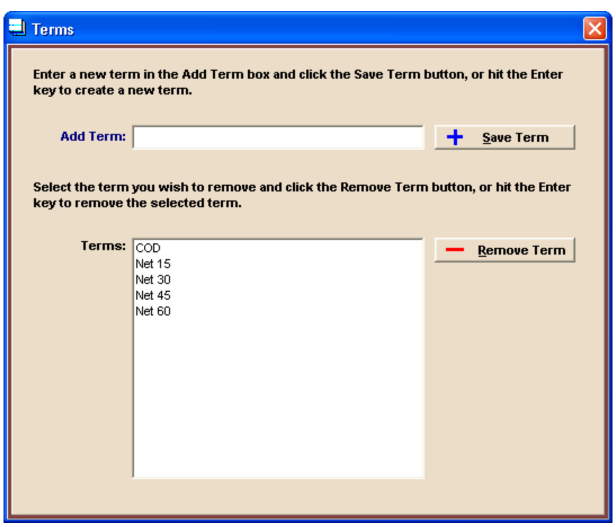
Adding a New Unit of Measure

Simply enter the new unit of measure in the Add Unit field, and a 2 character Unit Code in the Unit Code field. Click on the **Save Unit** button. Or, you may hit the **Enter** key to add the new unit of measure.

Removing a Unit of Measure

Select the unit of measure from the Units list and click on the **Remove Unit** button. Or, you may press the **Enter** key to remove the selected unit of measure.

Terms Screen

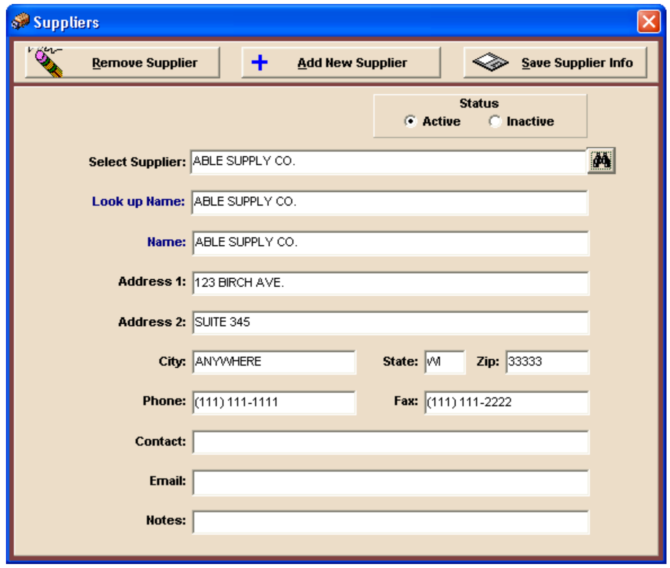


The Terms screen manages information relating to the various purchase/sales terms used in your system. Terms information is used on various screens and reports throughout WIN-STS. Click on the Support main menu item, and select Terms to open the Terms screen.

The Terms screen operates in exactly the same manner as the Units of Measure screen.

Suppliers Screen

The Suppliers screen manages information relating to the suppliers you use to purchase goods. Supplier information is used on various screens and reports throughout WIN-STS. Click on the Support main menu item, and select Suppliers to open the Suppliers screen.



Viewing Supplier Information

Click the Select Supplier button (binoculars) on the right side of the Name field. An alphabetical list of all suppliers previously entered into the system will appear. From the list, click on the supplier whose information you wish to view. The selected supplier's information will be displayed.

Editing Supplier Information

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

Adding a New Supplier

Click the **Add New Supplier** 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 Supplier Info button (mandatory). A mandatory field has a blue label. Press the Tab key to navigate to the next field. Continue adding supplier information, as desired, using the Tab key to navigate through the fields. Click the **Save Supplier Info** button when finished.

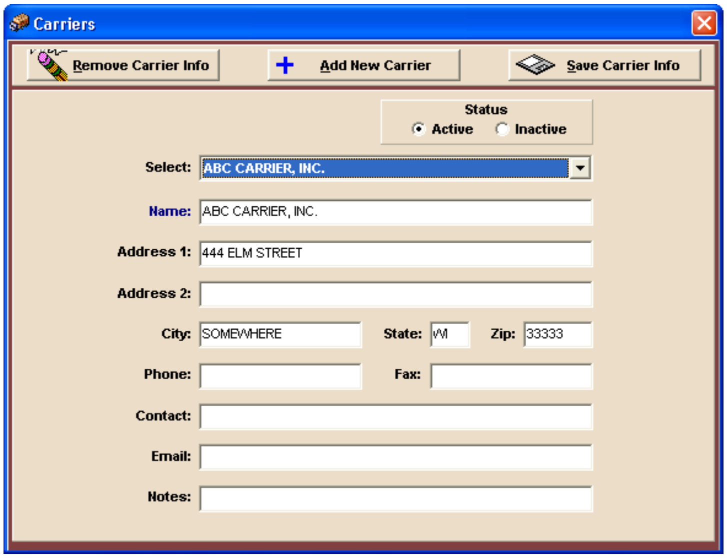
Removing a Supplier

Select the supplier you wish to remove. Click the **Remove Supplier Info** button. A prompt will appear asking if you're sure you want to permanently 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.

Inactivating a Supplier

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

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-STS. 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

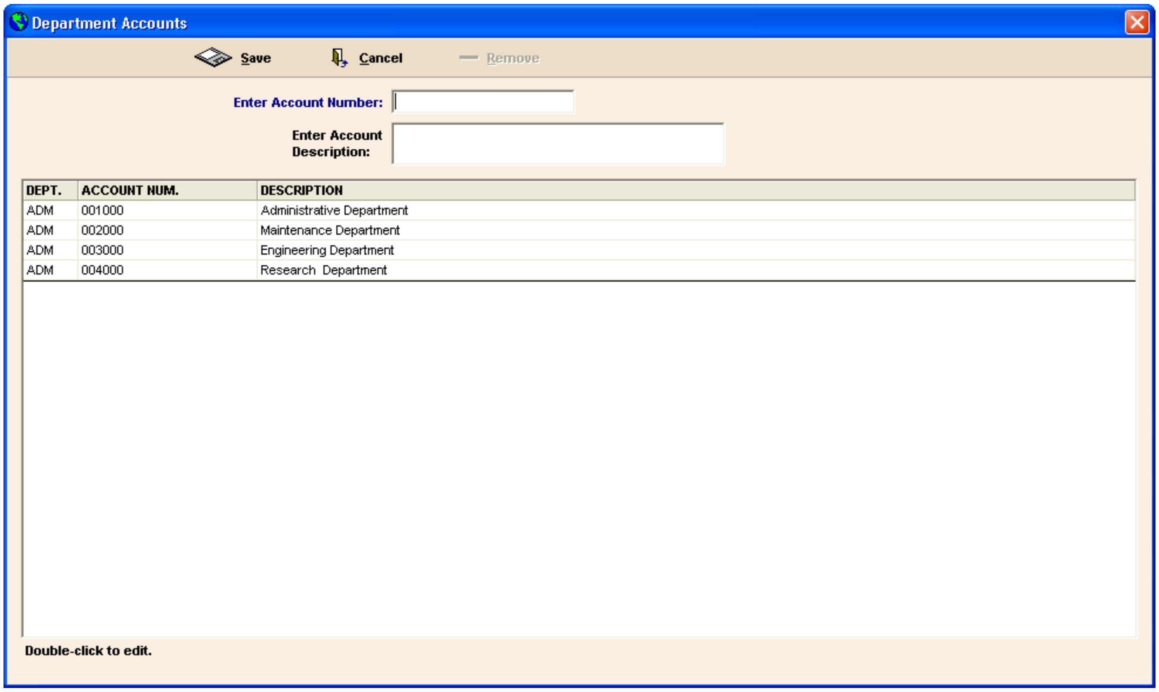
Select the carrier you wish to remove. Click the **Remove Carrier Info** button. A prompt will appear asking if you're sure you want to permanently remove the displayed carrier. Clicking the **Yes** button will remove the carrier. Clicking the **No** button will return you to the carrier screen without removing the carrier.

Inactivating a Carrier

As previously stated, carrier information is used on various screens and reports throughout WIN-STS. 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-STS. Clicking on the **Inactive** button will inactivate the selected carrier, making it unavailable to other WIN-STS functions without permanently removing it from the system. Clicking on the **Active** button will reactivate the selected carrier.

Department Accounts

Department Accounts are optional, they are not required to use WIN-STS. If you checkout parts that require account tracking, then enter the accounts on this screen. Click on the Support main menu item, and select Department Accounts to open the screen.



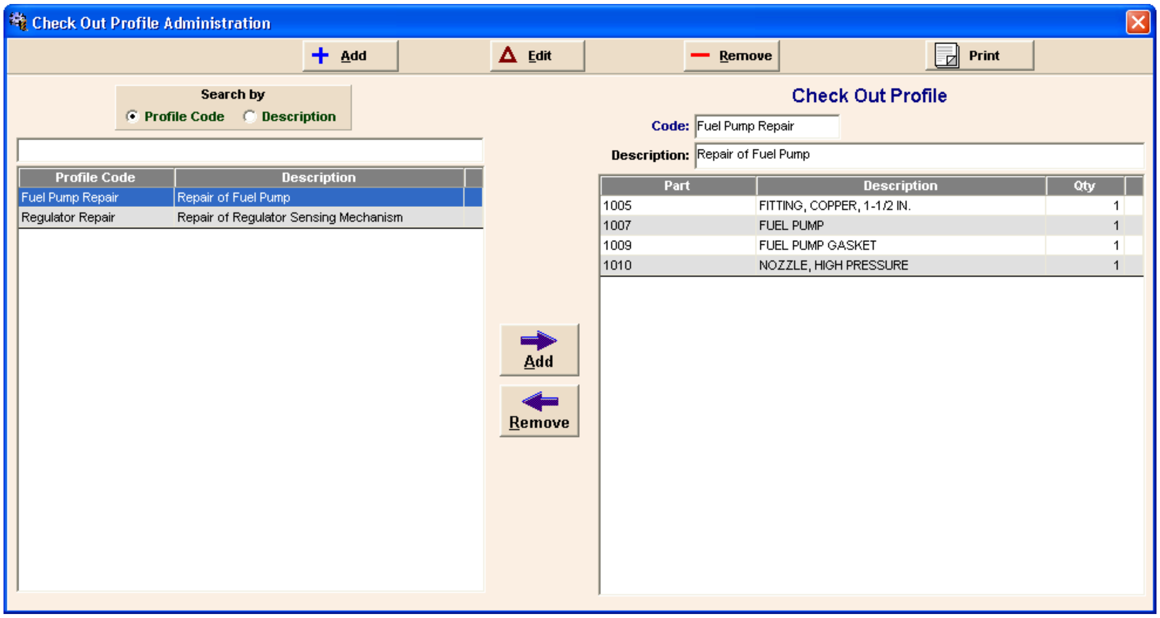
To enter a new department, just type in the Account Number and Description in the appropriate textboxes. Then click the **Save** button. The account will be listed in the grid.

To edit an existing account, double-click on the row that contains the account you want to edit. The information will appear in the textboxes. Make the desired changes and click the **Save** button.

To delete an existing account, double-click on the row that contains the account you want to delete. The information will appear in the textboxes. Click the **Remove** button. A confirmation message will appear. Clicking the **Yes** button will delete the account. Clicking the **No** button will return you to the screen without removing the account.

Check Out Profile

A checkout profile is a pre-built list of parts that are checked out together for a specific purpose. Selecting a profile speeds up the checkout process because the individual parts do not have to be entered each time. Click on the Support main menu item, and select Check Out Profile to open the screen.

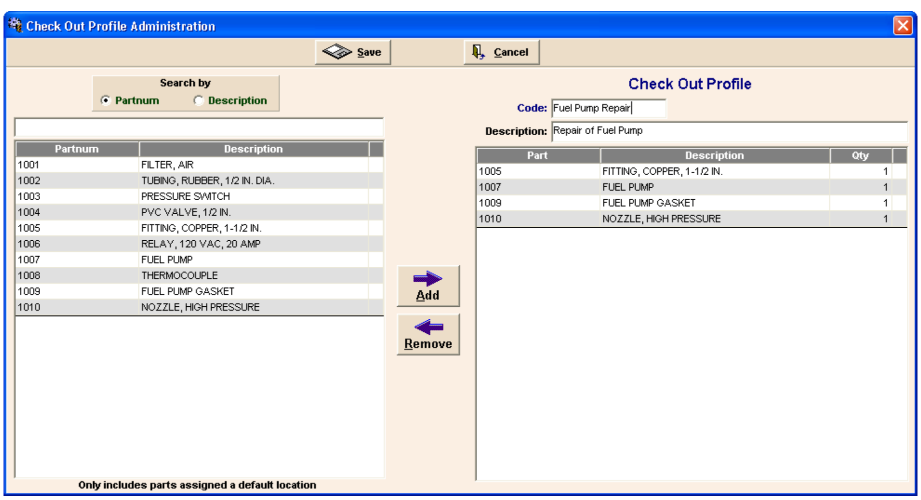


Viewing Check Out Profiles

Click on a profile on the left-hand side of the screen. A list of parts that are contained in the profile will appear on the right-hand side of the screen.

Editing a Check Out Profile

You may, at any time, change check out profile information or add missing information. Select the profile on the left side of the screen. Click the **Edit** button. A list of parts from the Part Master will appear on the left side of the screen. Only parts that are assigned a default location in the Part Master will be shown.



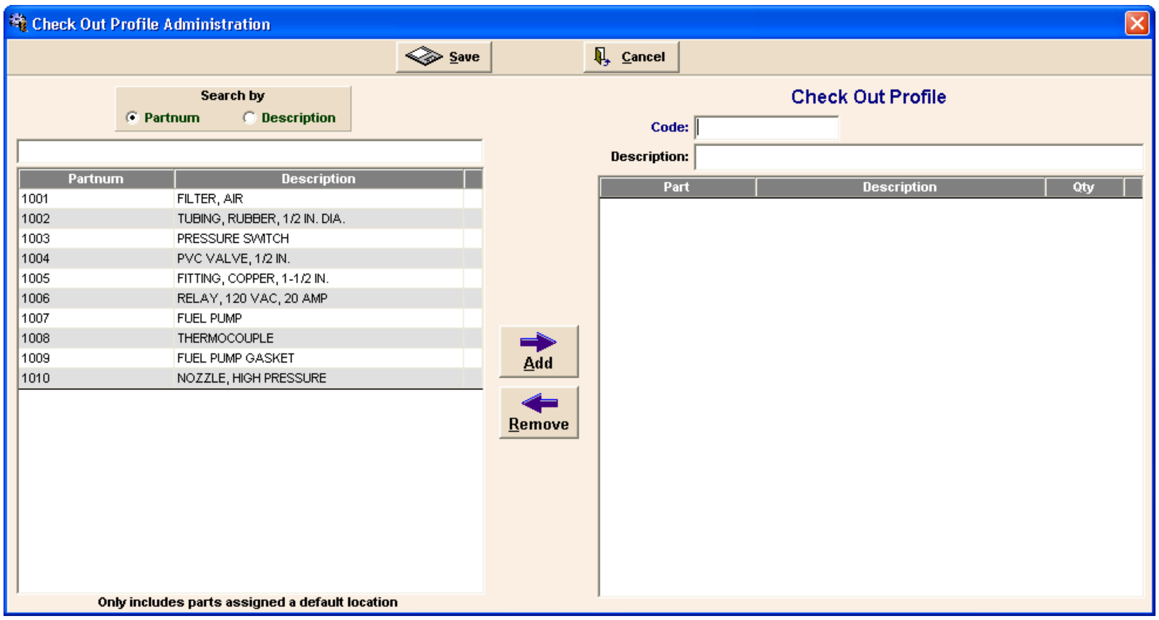
To add more parts to the profile, select them on the left-hand side of the screen and click the **Add** button. Multiple parts can be selected by holding down the Shift or Ctrl keys on the keyboard and clicking with the mouse. The new parts will appear in the right-hand list, with a default quantity of one. To change the quantity, click in the Qty column and enter a different number.

To remove parts from the list, select them on the right-hand side of the screen and click the **Remove** button. Multiple parts can be selected by holding down the Shift or Ctrl keys on the keyboard and clicking with the mouse.

When you have finished making changes to the profile, click the **Save** button.

Adding a New Check Out Profile

Click the **Add** button to create a new profile. Enter a Code and Description in the appropriate textboxes.



To add parts to the profile, select them on the left-hand side of the screen and click the **Add** button. Multiple parts can be selected by holding down the Shift or Ctrl keys on the keyboard and clicking with the mouse. The new parts will appear in the right-hand list, with a default quantity of one. To change the quantity, click in the Qty column and enter a different number.

To remove parts from the list, select them on the right-hand side of the screen and click the **Remove** button. Multiple parts can be selected by holding down the Shift or Ctrl keys on the keyboard and clicking with the mouse.

When you have finished building the profile, click the **Save** button.

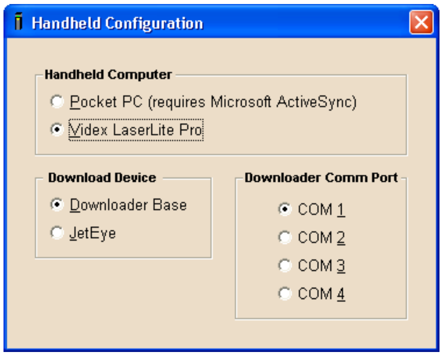
Removing a Check Out Profile

Select the profile to be removed on the left side of the screen. Click the **Remove** button on the button bar. A confirmation message will be displayed. Clicking the **Yes** button will delete the profile. Clicking the **No** button will return you to the screen without removing the profile.

Printing a Check Out Profile

Select the profile on the left side of the screen. Click the **Print** button. A print preview screen will appear with the selected profile displayed.

Handheld Configuration Screen



The Handheld Configuration screen is used to set the communication parameters for the handheld scanner. WIN-STS currently supports the Videx LaserLite Pro scanner. Click on the File main menu item, and select Handheld Configuration to open the screen.

Select the type of download device that is being used, and which COM port (serial port) that it is connected to. The settings will be saved on the computer.

Edit Checkout Records

Some information in the checkout records can be edited. Click on the File main menu item, and select Edit Checkout Records to open the screen.

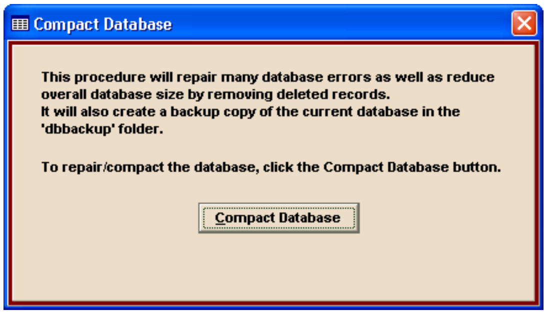
DATE	EMPLOYEE	PART NUM.	DESCRIPTION	INVENTORY LOCATION	QTY	WORK ORDER	ACCOUNT NUM.
11/22/2006 10:53 AM	DEMO, USER	1005	FITTING, COPPER, 1-1/2 IN.	BIN 1	1	1234	
11/22/2006 10:53 AM	DEMO, USER	1007	FUEL PUMP	SHELF C	1	1234	
11/22/2006 10:53 AM	DEMO, USER	1009	FUEL PUMP GASKET	SHELF A	1	1234	
11/22/2006 10:53 AM	DEMO, USER	1001	FILTER, AIR	SHELF A	-1	1234	
11/22/2006 10:53 AM	DEMO, USER	1001	FILTER, AIR	SHELF A	2	1234	
03/21/2007 02:24 PM	DEMO, USER	1001	FILTER, AIR		5		001000
03/21/2007 02:24 PM	DEMO, USER	1002	TUBING, RUBBER, 1/2 IN. DIA.		4		001000
03/29/2007 12:15 PM	Tester, Larry	1001	FILTER, AIR	SHELF A	1	456	001000
03/29/2007 12:15 PM	Tester, Larry	1002	TUBING, RUBBER, 1/2 IN. DIA.	SHELF B	1	456	001000
03/29/2007 02:00 PM	Tester, Larry	1001	FILTER, AIR		1		001000
03/29/2007 02:03 PM	DEMO, USER	1002	TUBING, RUBBER, 1/2 IN. DIA.	SHELF B	1		
03/29/2007 02:10 PM	DEMO, USER	1001	FILTER, AIR		1		002000
03/29/2007 02:23 PM	Tester, Larry	1001	FILTER, AIR		1	456	001000
03/29/2007 02:28 PM	DEMO, USER	1001	FILTER, AIR		1	78	003000
03/29/2007							

Only the Qty, Work Order and Account Number can be edited. Just click in the cell and enter the correct information, then click the **Save** button.

Print Screen

Some screens in WIN-STS can be printed. To print the displayed screen, click on the File main menu item, and select Print Screen. If the displayed screen cannot be printed, a message will appear to inform you. If the screen can be printed, a confirmation message will appear. Clicking the **Yes** button will print the screen. Clicking the **No** or **Cancel** buttons will return you to the screen without printing.

Compacting the WIN-STS Database



The Compact Database function will repair many minor database errors as well as reduce overall database size by removing deleted records. It will also create a backup copy of the current database and save it in the 'dbbackup' folder in the WIN-STS 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.

Inventory Counts (Professional version only)

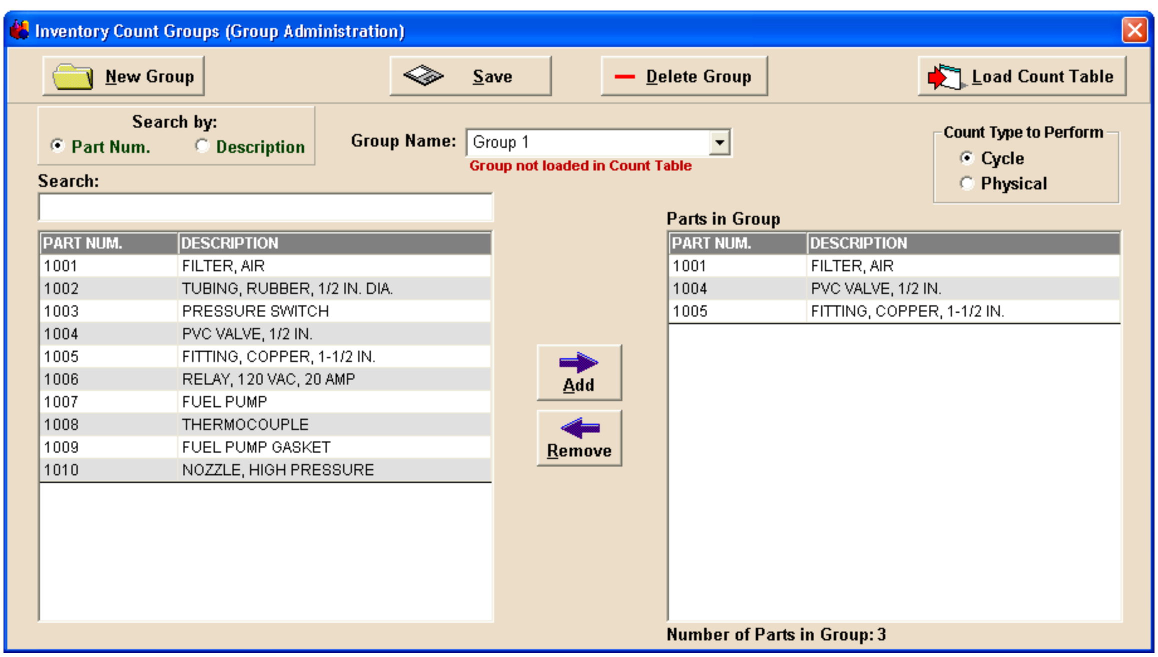
The Inventory Count function is used to verify inventory. The count function requires a handheld scanner. There are two types of count functions in WIN-STS, cycle count and physical count.

In a ***cycle count***, if nothing is counted for an item, the current inventory quantity in the database is not changed. A cycle count can be performed on a selected group of parts.

In a ***physical count***, if nothing is counted for an item, the current inventory quantity in the database is set to **zero**. A physical count includes ALL parts in inventory. It is recommended that all operations be shut down until a physical count can be completed.

Inventory Count Group Administration

Inventory count groups are used to make the cycle count process more manageable. Part numbers can be grouped together and loaded onto a handheld scanner. Click on the Inventory Counts main menu item, and select Group Administration to open the screen.



Select the parts for a group from the grid on the left side of the screen. Multiple parts can be selected by holding down the Shift or Control keys on the keyboard and clicking on the rows in the grid. Click the **Add** button to add these parts to a group. If you want to remove parts from the group, select them from the grid on the right side of the screen and click the **Remove** button. Enter a name for the group in the Group Name field and click the **Save** button. You can create as many groups as needed.

Editing the Parts in a Group

Select the group name from the dropdown list. All of the parts in the group will be listed in the grid below. Make any additions or deletions as required, then click the **Save** button.

Deleting a Group

Select the group name from the dropdown list. Click the **Delete Group** button. Responding yes to the confirmation prompt will delete the group.

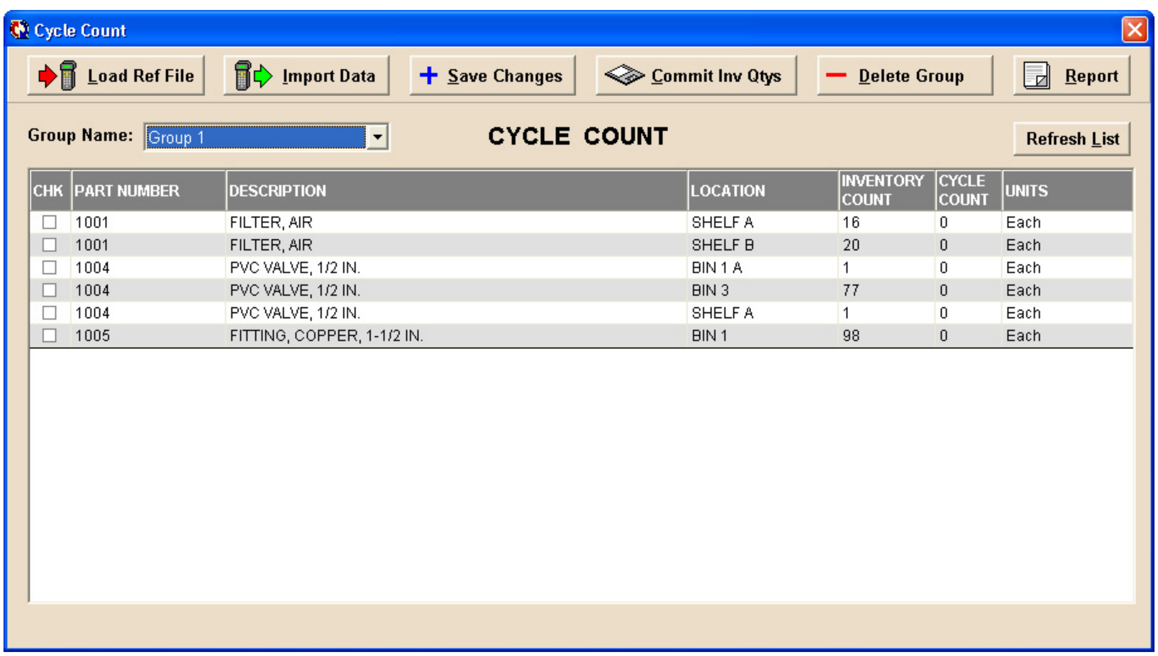
Count Type to Perform

Select the Cycle Count option to perform a cycle count of the parts in the selected group. Click the **Load Count Table** button to load the group of parts into a temporary count table in the database. From there the group can be loaded onto the handheld scanner on the Cycle Count Download screen.

Select the Physical Count option to perform a physical count. When the Physical option is selected, a new group is automatically created, which includes ALL parts in inventory. This group will always be called PHYSCNT. Click the **Save** button to save the group file. This ensures that the group file will always be up-to-date when a physical count is performed. Then click the **Load Count Table** button to load the group into the temporary count table.

Performing a Cycle Count

After the cycle count groups are created and loaded into the temporary count table, they can be loaded onto a handheld scanner. Note that only <u>one</u> count group can be loaded onto a scanner at a time. Click on the Inventory Counts main menu item, and select Cycle Count to open the screen.



Select a group from the Group Name list. All of the parts in that group will be listed in the grid. Click the **Load Ref File** button to load the file onto the handheld scanner. The user can now take the scanner out to the warehouse and count inventory. The scanner will only accept data for parts in the group.

After the count is completed, download the data from the scanner. Place the scanner in the downloader. Turn it on and click the **Import Data** button on the Cycle Count screen. After the files are processed, the group will appear on the screen.

If the cycle 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 and cycle count will be displayed in red. These items can then be verified.

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

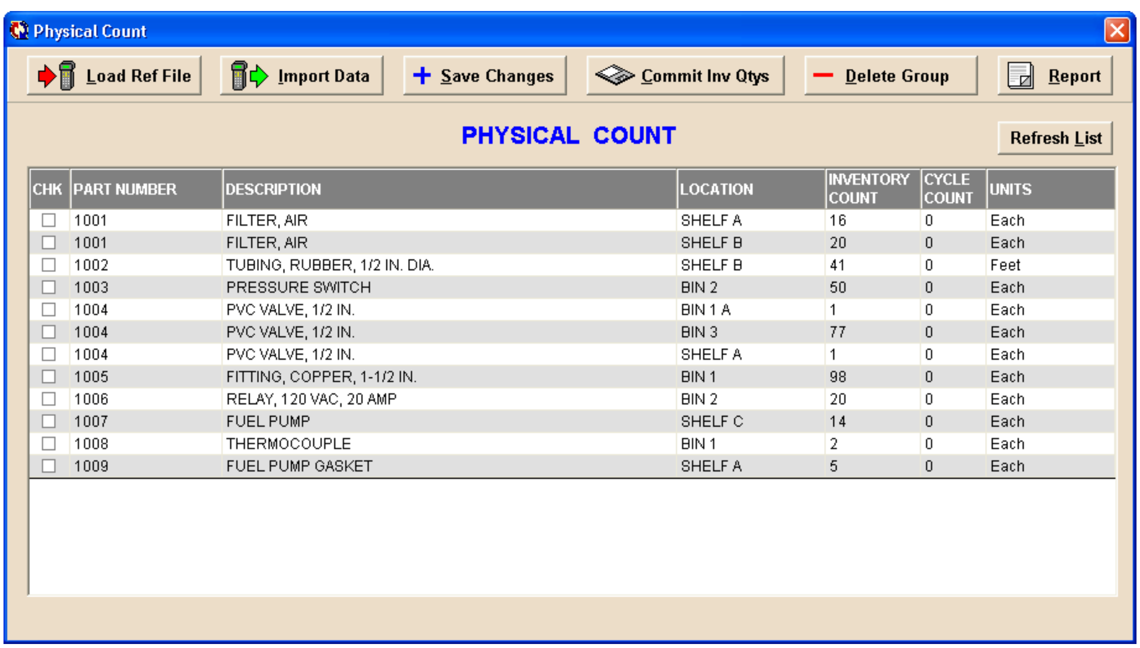
If the cycle count value is correct, check the checkbox in the first column. If the cycle count value is not correct, it can be changed in the grid by selecting it with the mouse and entering a different value. Then check the checkbox in the first column. Click the **Save Changes** button to save the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

Remove A Cycle Count Group File

Click on the Inventory Counts main menu item, and select Cycle Count to open the screen. *Print any reports you may need before removing data from the count table.* Select a group from the Group Name list. Click the **Delete Group** button. 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.

Performing A Physical Count

After the physical count group is created and loaded into the temporary count table, it can be loaded onto a handheld scanner. Click on the Inventory Counts main menu item, and select Physical Count to open the screen.



All of the parts in the physical count group will be displayed on the screen. Click the **Load Ref File** button to load the file onto the handheld scanner. The user can now take the scanner out to the warehouse and count inventory. The scanner will only accept data for parts in the group.

After the count is completed, download the data from the scanner. Place the scanner in the downloader. Turn it on and click the **Import Data** button on the Physical Count screen. 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 and physical count will be displayed in red. These items can then be verified.

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

If the physical count value is correct, 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.

Remove A Physical Count Group File

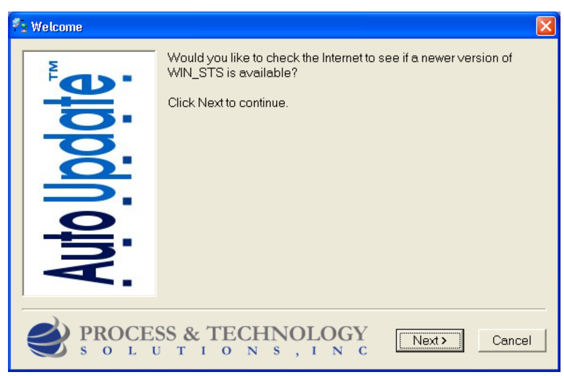
Click on the Inventory Counts main menu item, and select Physical Count to open the screen. *Print any reports you may need before removing data from the count table.* Click the **Delete Group** button. If there is a physical group in the count table, a confirmation box will be displayed. Responding 'Yes' to the message will display a second confirmation message. Responding 'Yes' to the message will delete the group from the count table.

Check For Update

The Check For Update function can automatically check for an updated executable file for WIN-STS. An internet connection is required. All other users must exit the application before using this function.

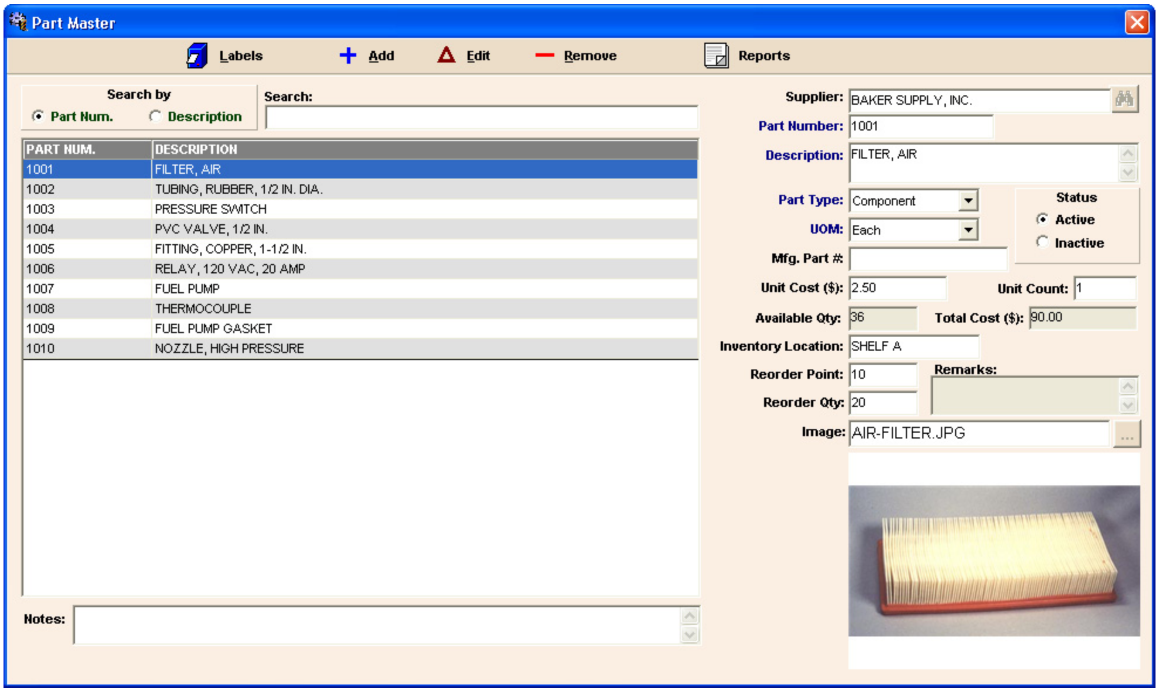
Only users that have "Users" authorization set to "Yes" on the User Authorization screen will have access to the Check For Update function.

Click on the Help main menu item, and select Check For Update. Responding 'Yes' to the confirmation message will display the AutoUpdate screen.



Click the **Next** button to check for an update. When the function is finished, WIN-STS will restart.

Part Master Screen



The Part Master screen contains detailed information pertaining to the various parts used in your system. The right side of the screen displays 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-STS and should be carefully maintained.

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

Viewing Detailed Part Information

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.

Using the Search Options

Search options to locate an existing part include searching by part number or searching by part description.

Search by part number

- Click the Part Number option in the Search Options box.
- Begin typing the part number in the Search field. WIN-STS will automatically select the first part it finds that matches the number you entered.

Search by part description

- Click the Description option in the Search Options box.
- Begin typing the part description in the Search field. WIN-STS will automatically select the first part it finds that matches the part description you entered.

Adding a New Part

You may add a new part to WIN-STS any time you like. Use the following procedure to add a new part.

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

Editing Part Information

You may edit, or change, part information in WIN-STS any time you like. Use the following procedure to edit existing 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.
- Click the **Save** button when you have finished changing part information.

Removing an Existing Part

You may remove an existing part from WIN-STS as long as the part does not have a positive quantity in inventory. Use the following procedure to remove an existing part.

- Select the part you wish to remove from the list on the left and click the **Remove** button.
- 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.

Printing Labels

Design a Part label using the Label Design screen. Set your design as the default Part label using the Label Setup screen (described later in this manual).

- Select the parts to print labels for in the grid on the left side of the screen. Multiple parts can be selected by holding down the Shift or Ctrl keys on the keyboard, and clicking parts with the mouse.
- Click the **Labels** button. Labels for the selected parts will be printed.

Viewing a List of Parts

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

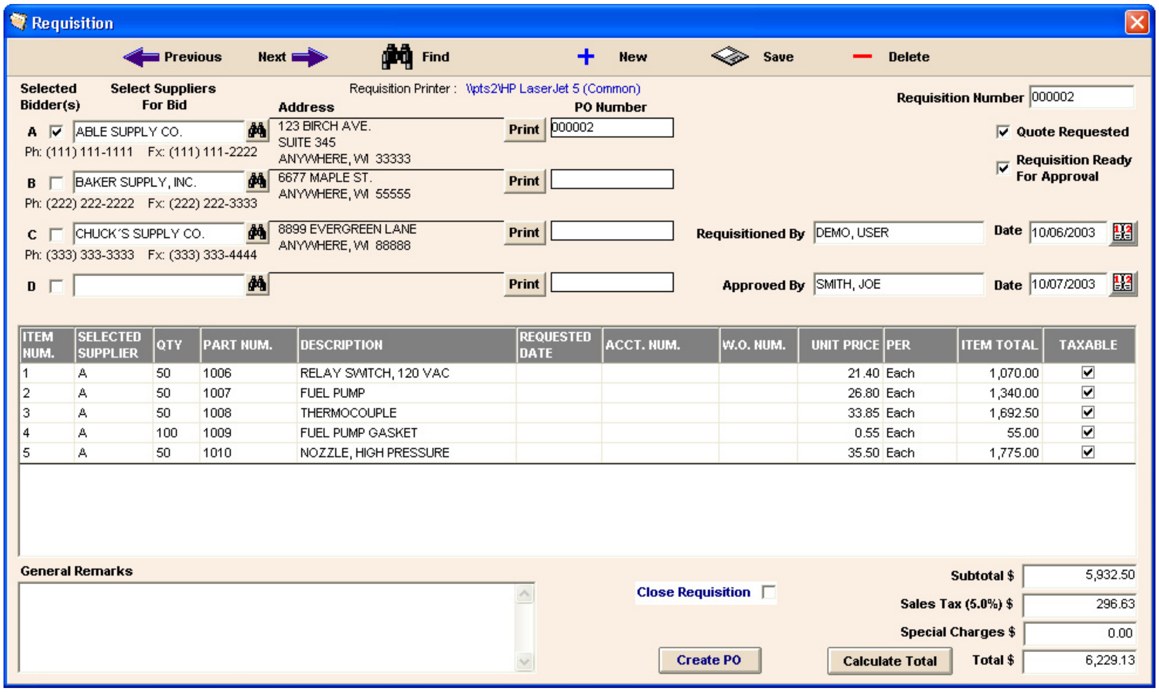
- Click the **Reports** button.
- A complete list of parts will appear. Click the **Print** button to print the list.

Adding Images

Images of parts can be viewed on the Part Master screen. Images can be scanned in with a scanner (using scanner software), or taken with a digital camera. To add an image to an existing part record, select the part in the left-hand grid. Click the **Edit** button. Click the **Browse** button at the end of the Image field to display a selection dialog box. Browse to the desired image on your computer and select it, then click the Open button (or double-click the image file). Click the **Save** button to save the change.

Requisition Screen (Professional version only)

To view the Requisition screen, click the **Requisition** button on the WIN-STS main button bar.



Create a Requisition

Select the supplier(s) that the bids will be sent to from the **Select Suppliers For Bid** dropdown lists. A maximum of four suppliers can be selected for each requisition. When a supplier is selected, the phone number will appear below the box, and the address will appear to the right of the box (the phone number and address for each supplier must be entered on the Supplier screen).

Enter your name in the **Requisitioned By** textbox. The requisition date defaults to the current date. A different date can be selected by clicking the calendar button next to the date box, or by typing in a valid date.

Click in the Item Num. column of the grid and enter a number. Press the tab or enter key on the keyboard and enter the quantity needed. Press the tab or enter key to advance to the Part Num column. A list of all parts in the database will appear. If the part number is known, you can scroll down the list and double-click on the part desired.

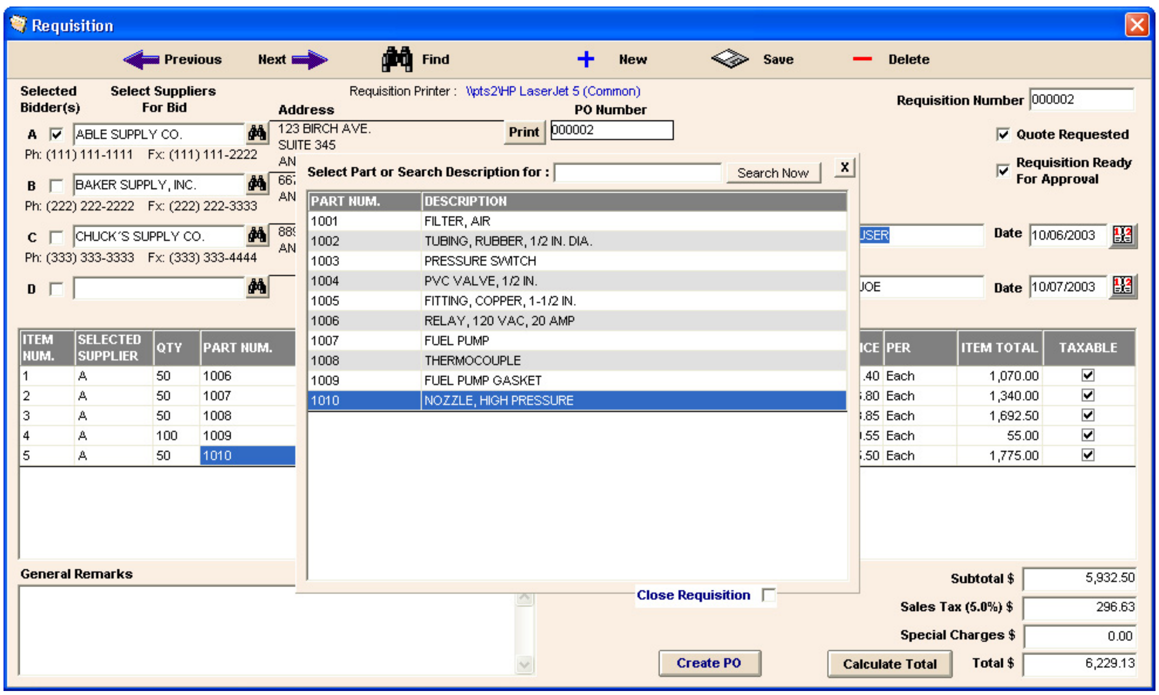
The part list can be filtered to make it easier to find a part. In the **Search Description for** textbox, enter a word that appears in the description. For example if you want to find a specific filter, type the word *filter* in the textbox and press the Enter key on the keyboard (or click the **Search Now** button). This list will only show the parts that have the word *filter* anywhere in the description. To show all of the parts in the list again, remove any words that are in the textbox and press the Enter key, or click the **Search Now** button.

When a part is double-clicked, the part list will disappear and the part number, description and per columns in the grid will be filled in. Enter the Requested Date, if needed, and press the tab or enter key.

Enter an account number and a work order number, if desired. Leave the Unit Price column blank. If the per column is not correct, select a different one from the dropdown list. The Item Total column is not editable. The Taxable column is checked by default. For non-taxed items, it can be unchecked by clicking on the checkbox.

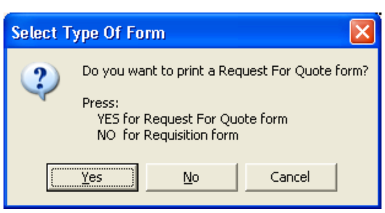
Pressing the enter key on the keyboard in the Per column will create a new row in the grid, ready for another item. A new row can also be added by right-clicking in the Item Num. column and selecting the Add option.

Enter any comments about the requisition in the General Remarks textbox. Click the **Save** button when the requisition is completed.



Request For Quote

Click the **Print** button next to the supplier address. A message will appear asking which type of form you want to print.



Click the Yes button to print the 'Request For Quote' form for that supplier. The preview form will appear on the screen. The form can be printed and sent to the supplier for a quote.

After the request for quotes have been sent, check the **Quote Requested** checkbox on the requisition screen and click the **Save** button.

Enter Pricing Information

After the suppliers have sent back their quotes, check the **Selected Bidder(s)** checkbox for the chosen suppliers (more than one is permitted). When the first checkbox is selected, the Selected Supplier column in the grid will be filled in with the supplier letter, for all items in the requisition. If more than one supplier is chosen, edit the Selected Supplier column to indicate which items are for each supplier. Enter the price information in the Unit Price column for each item. The Item Total column will be calculated and filled in. The requisition totals will also be filled in. Enter any special charges that may apply in the **Special Charges** box. Click the **Calculate Total** button to validate the calculations, then click the **Save** button.

The requisition is now ready for approval. Check the **Requisition Ready For Approval** checkbox and click the **Save** button.

The requisition can be approved by anyone who has authorization to do so. Access to this function is controlled in the User Authorization screen. An authorized user can click in the **Approved By** textbox and enter his/her name. Enter a date in the date textbox by double-clicking the textbox to enter the current date, or clicking the calendar button and selecting a date. Click the **Save** button.

Create the PO

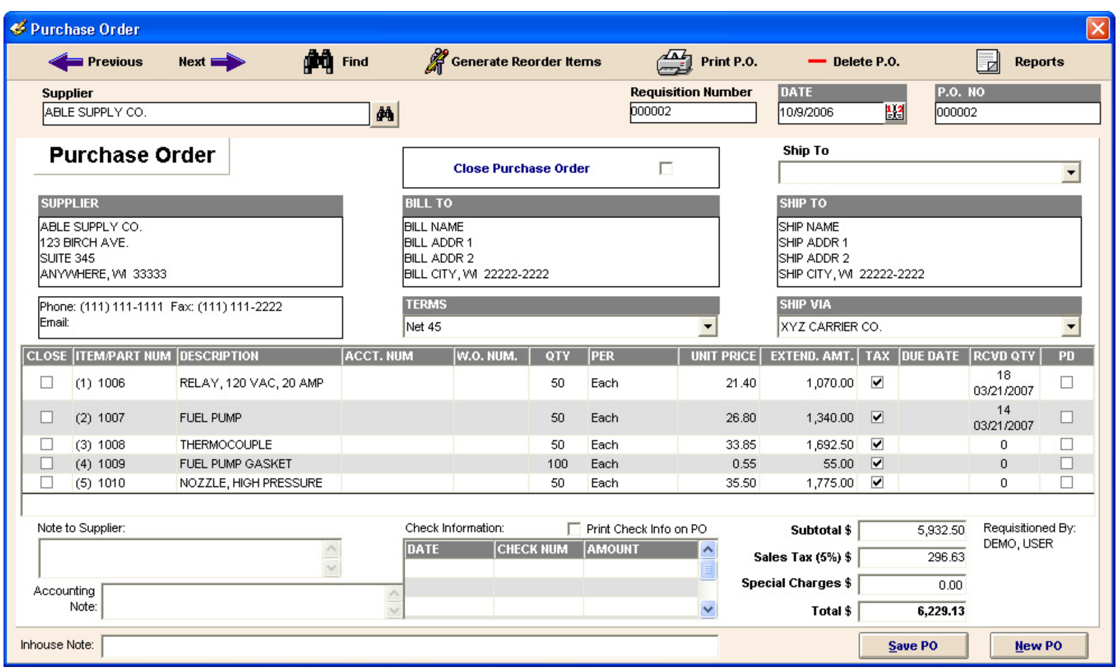
After the requisition is approved, click the **Create PO** button. A PO will be created for each selected bidder containing the items that have been designated for him. The PO number will be displayed next to each print button of the selected bidder. After the PO's have been created, the requisition will be closed.

If changes to the requisition and PO's need to be made after the requisition has been closed, uncheck the **Close Requisition** checkbox. Make the changes and click the **Save** button. Click the **Create PO** button. The existing PO's for the requisition will be deleted, and new PO's will be created.

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-STS main button bar.



When the Purchase Order screen first opens, it is setup for creating a new purchase order. It has pre-selected your company as the bill to/ship to entity, 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-STS 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-STS will maintain your formatting scheme. ****

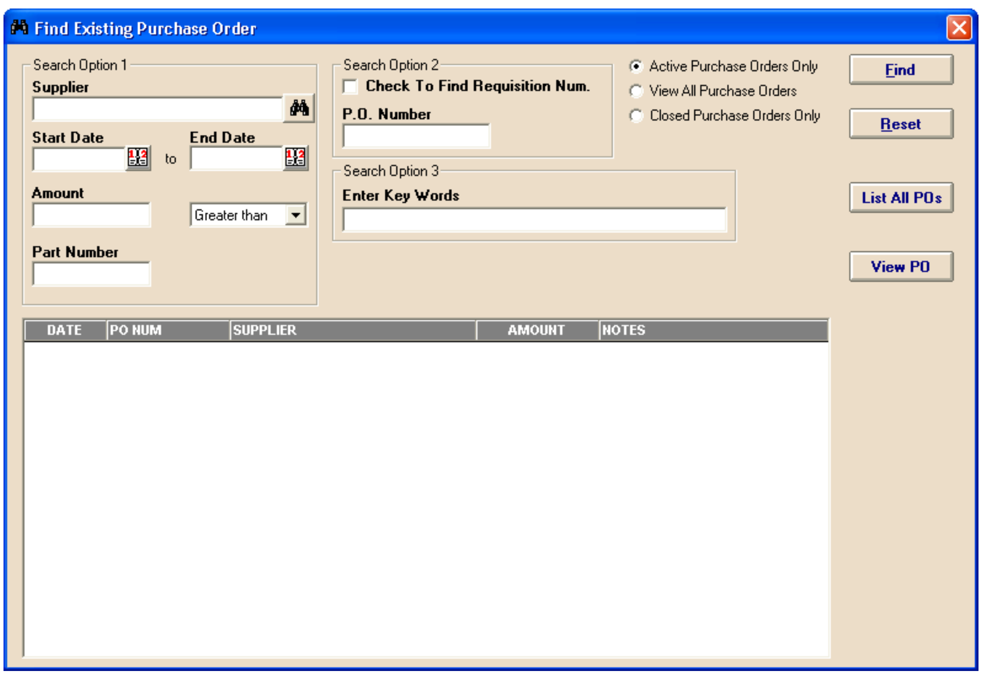
Viewing Purchase Order Information

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

The **Previous** Button
Clicking the Previous button displays the Purchase Order whose PO Number is one less than the currently displayed Purchase Order.

The **Next** Button
Clicking the Next button displays the Purchase Order whose PO Number is one more than the currently displayed Purchase Order.

The **Find** Button
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-STS.



Search Option 1
The Search Option 1 fields allows for searching through the WIN-STS system for POs 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 and only POs 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 and POs for *all* suppliers created on, or after, the selected Start Date but before, or on, the selected End Date will be displayed. Enter an amount, select 'Greater than', and click the **Find** button. Only POs with an amount greater than the entered amount will be displayed. Enter a Part Number and click the **Find** button. Only POs that have that part number will be displayed.

Search Option 2

If you want to find 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. If you want to view purchase orders created from a specific Requisition, click the **Check To Find Requisition Num** checkbox and enter the Requisition number in the textbox. Then click the **Find** button. Select the item from the list and click the **View** button.

<u>Search Option 3</u>
The Search Option 3 field allows you to search for POs by entering words that appear in item descriptions. Multiple words can be entered with a plus sign (+) between them. For example, if the word "exterior" is typed in the Key Words box, all POs with that word in at least one item description will be displayed. If the words "exterior + red" is typed in the Key Words box, all POs that have both "exterior" and "red" in a least one item description will be displayed.

<u>Search Option Buttons</u>
The search option buttons work in conjunction with the search options discussed above.

- Active Purchase Orders Only will display only purchase orders that are not closed.
- View All Purchase Orders will display both open and closed purchase orders.
- Closed Purchase Orders only will display only purchase orders that have been closed.

<u>The Reset Button</u>
Clicking the **Reset** button will clear the Find Existing Purchase Order screen so you can conduct a new search.

<u>The List All POs Button</u>
The **List All POs** button will display all purchase orders in WIN-STS.

<u>The View PO Button</u>
Select a displayed purchase order by clicking anywhere in one of the rows of the displayed records list. Click the **View PO** button to display the selected purchase order details on the Purchase Order screen. The PO can also be displayed by double-clicking on a row.

Creating a New Purchase Order

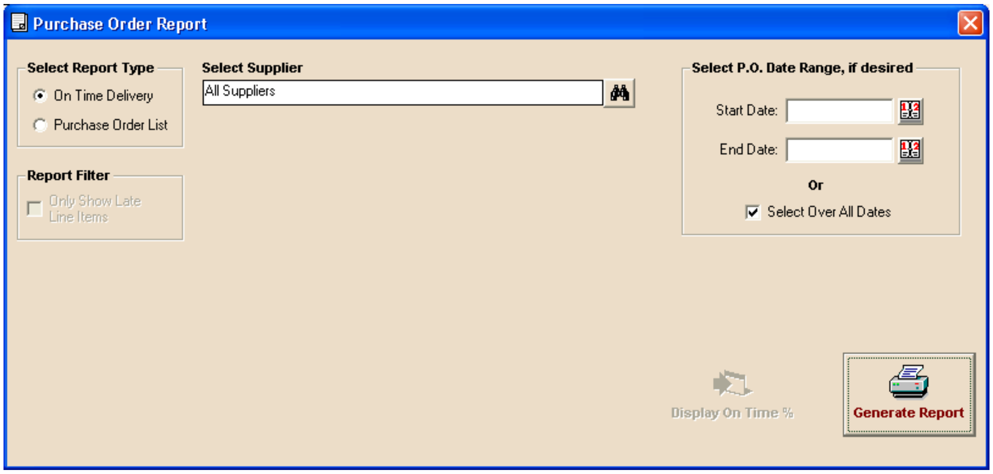
- Click the **New PO** button.
- Click the **Select Supplier** button (binoculars). A list of Suppliers appears. Click on one of them. The selected supplier's address information loads into the Supplier address box.
- Click the button to select Ship To information if you need to change from the default selection. If the Ship To entity is not available in the list, click in the address box and manually enter the address information.
- Use the same procedure to select Terms and Ship Via information.
- Use the mouse and double-click in the Part Num field in the parts list. This will display a list of parts that were entered in the Part Master. Double-clicking on a part in the list will enter the part number and description in the grid. You can also type a valid part number in the Part Num cell and press the **Enter** key. If the part number entered is not valid, you will not be able to use it. If the part number entered is valid, the part description will display and the cursor will move to the Acct. Num field.
- Double-click in the Acct. Num field to display a list of account numbers that were entered on the Department Accounts screen. Double-click an account number to enter it on the P.O., or click the **X** button to leave the account number field blank.
- Enter the Work Order number, if desired, and press the **Enter** key.
- Enter the quantity you wish to purchase and press the **Enter** key. WIN-STS will calculate the total cost and prepare for the next entry.
- The tax checkbox is checked by default. Tax will be calculated on all line items that have this box checked. If tax is not charged for a line item, simply uncheck this box.
- If a line item is required by a specific date, enter the date in the Due Date cell.
- You may also include a note to the supplier and a note for in-house use.
- Click the **Save PO** button when finished.

Printing a Purchase Order

Click the **Print P.O.** button to view a printable copy of the currently displayed P.O.

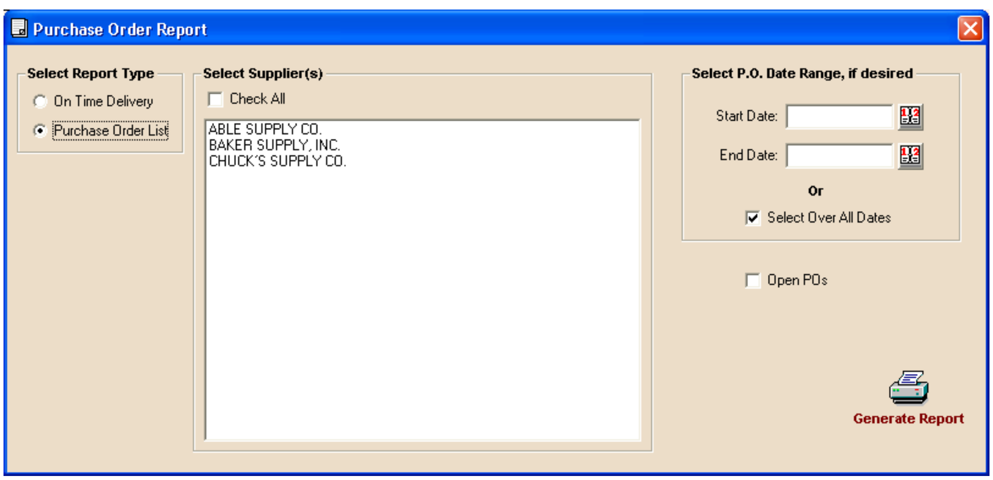
Printing Purchase Order Reports

Clicking the **Reports** button will display the Purchase Order Report screen. Use the Purchase Order Report screen to print a summary of Purchase Orders in WIN-STS based on user selected criteria.



The On Time Delivery report shows late items for the selected Supplier (or All Suppliers) if a Due Date is specified on the P.O. The filter to Only Show Late Line Items is only available if a specific supplier is selected.

The Purchase Order List report shows a list of Purchase Orders for the selected supplier(s).

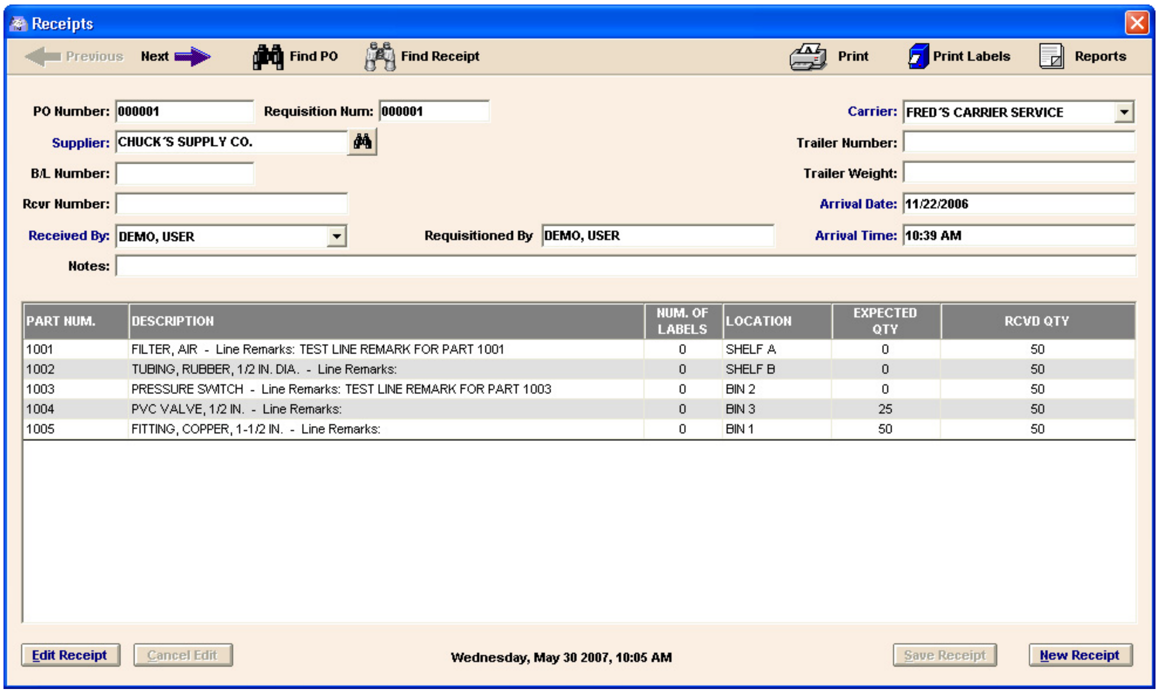


Select the Open P.O.s checkbox to limit the list to open P.O.s only.

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. Receipt records are stored in WIN-STS in the order in which they were received.

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



When the Receipts screen first opens, it is setup for creating a new receipt record. 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 button.

The **Previous** Button

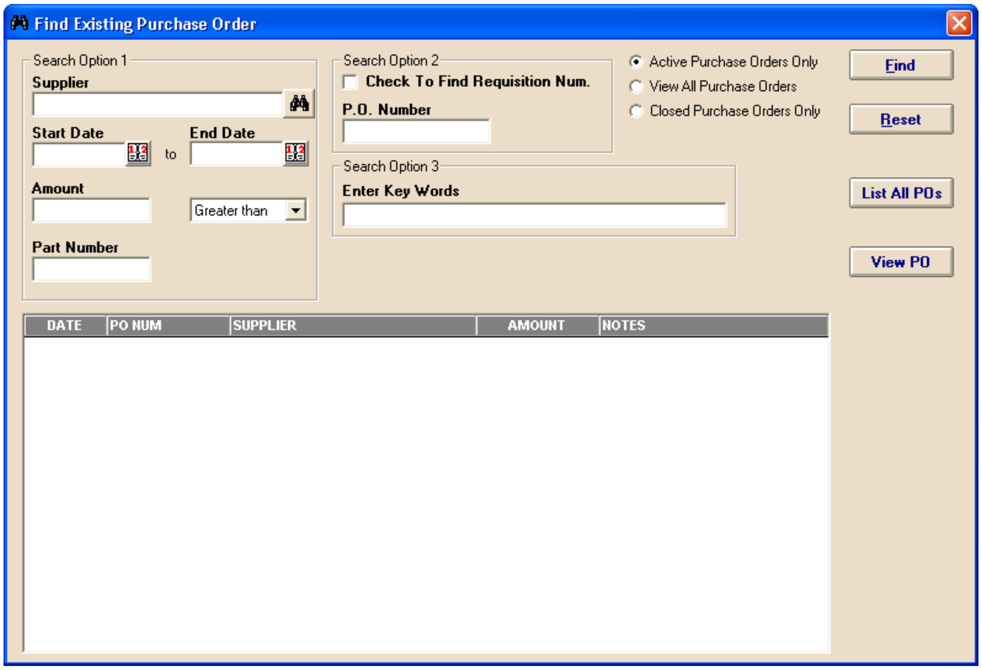
Clicking the **Previous** button displays the receipt record that was created immediately before the currently displayed receipt record.

The **Next** Button

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

The **Find PO** Button

Clicking the **Find PO** button will display the Find Existing Purchase Order screen. Use the Find Existing Purchase Order screen to receive items from any PO in WIN-STS.



Search Option 1

The Search Option 1 fields allows for searching through the WIN-STS system for POs 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 and only POs 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 and POs for *all* suppliers created on, or after, the selected Start Date but before, or on, the selected End Date will be displayed. Enter an amount, select 'Greater than', and click the **Find** button. Only POs with an amount greater than the entered amount will be displayed. Enter a Part Number and click the **Find** button. Only POs that have that part number will be displayed.

Search Option 2

If you want to receive items from 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. If you want to receive purchase orders created from a specific Requisition, click the **Check To Find Requisition Num** checkbox and enter the Requisition number in the textbox. Then click the **Find** button. Select the item from the list and click the **View** button.

Search Option 3

The Search Option 3 field allows you to search for POs by entering words that appear in item descriptions. Multiple words can be entered with a plus sign (+) between them. For example, if the word "exterior" is typed in the Key Words box, all POs with that word in at least one item description will be displayed. If the words "exterior + red" is typed in the Key Words box, all POs that have both "exterior" and "red" in a least one item description will be displayed.

Search Option Buttons

The search option buttons work in conjunction with the search options discussed above.

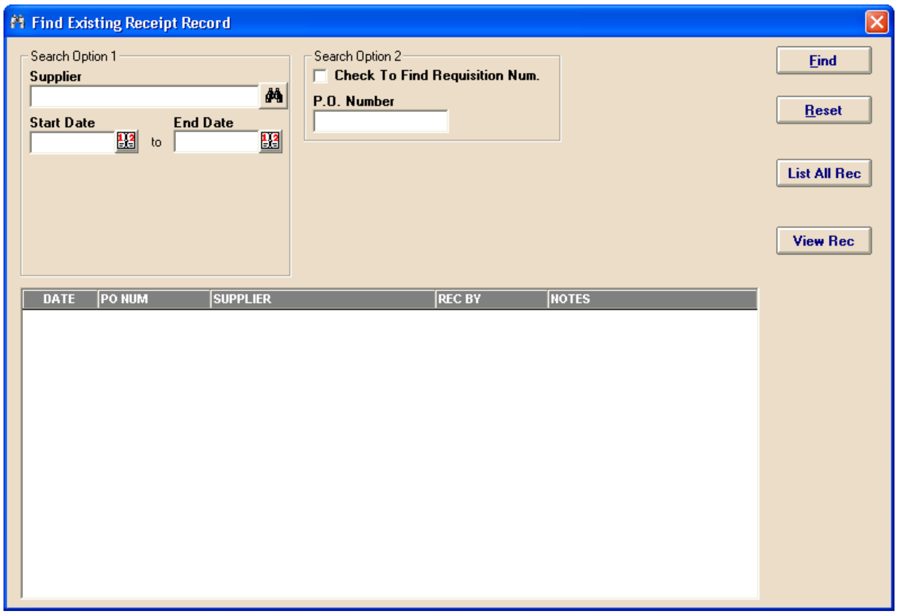
- Active Purchase Orders Only will display only purchase orders that are not closed.
- View All Purchase Orders will display both open and closed purchase orders.
- Closed Purchase Orders only will display only purchase orders that have been closed.

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

The List All POs Button
The **List All POs** button will display all purchase orders in WIN-STS.

The View PO Button
Select a displayed purchase order by clicking anywhere in one of the rows of the displayed records list. Click the **View PO** button to display the selected purchase order details on the Receipts screen.

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



Search Option 1
The Search Option 1 fields allows for searching through the WIN-STS 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 and 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 and 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. If you want to receive purchase orders created from a specific Requisition, click the **Check To Find Requisition Num** checkbox and enter the Requisition number in the textbox. Then click the **Find** button. Select the item from the list and click the **View** 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 All Rec Button
The **List All Rec** button will display all receipt records in WIN-STS.

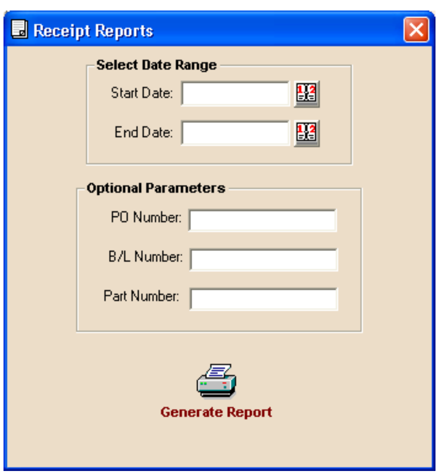
The View Rec Button
Select a displayed receipt record by clicking anywhere in one of the rows of the displayed receipt records list. Click the **View Rec** button to display the selected receipt record's details on the Receipts screen.

Creating a New Receipt Record
- Click the **New Receipt** button.
- If you are receiving these items against a purchase order and the purchase order number is known, enter the number in the PO Number field and press the Enter key on your keyboard. Any open items on that purchase order will be displayed in the grid.
- Enter the associated information in the fields provided.
- In the parts list, click in the Part Number field, enter a part number and press the **Enter** key (if a part number is not already there).
- Tab to, or click in, the Location field and select an *inventory* Location from the list.
- Tab to, or click in, the Rcvd Qty field and enter the received quantity. (Note: the Expected Qty column can be left blank.)
- Repeat the last three, or four, steps for all items received.
- Click the **Save Receipt** button when finished.

The Edit Receipt Button
The **Edit Receipt** button will let you modify the information on an existing receipt record. Locate a receipt record using one of the methods described above. When the record is displayed on the Receipt screen, click the **Edit Receipt** button.

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

Printing Receipt Item Labels
Enter the number of labels you wish to print in the **Num Of Labels** field for the desired receipt item and click the **Print Labels** button. Labels will be printed based on the default receipt label design selected on the Label Setup menu. If a default receipt label is not selected, labels will not print.

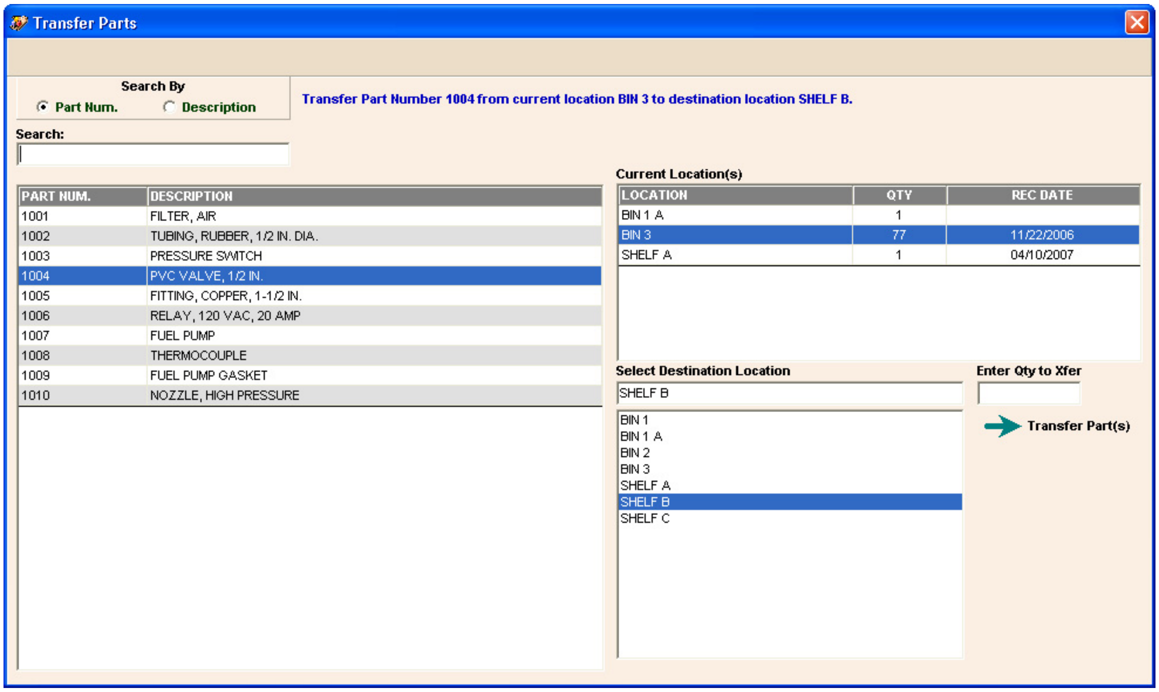


Printing Receipt Record Reports
Clicking the **Reports** button will display the Receipt Reports screen. Use the Receipt Reports screen to view/print received items reports.

Clicking the **Generate Report** button, with all fields blank, will display all receipt records currently in WIN-STS.

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-STS main button bar.

Using the Search Options

Search options to locate an existing part include searching by part number or searching by part description.

Search by part number

- Click the Part Number option in the Search by box.
- Begin typing the part number in the Search field. WIN-STS will automatically select the first part it finds that matches the number you entered.

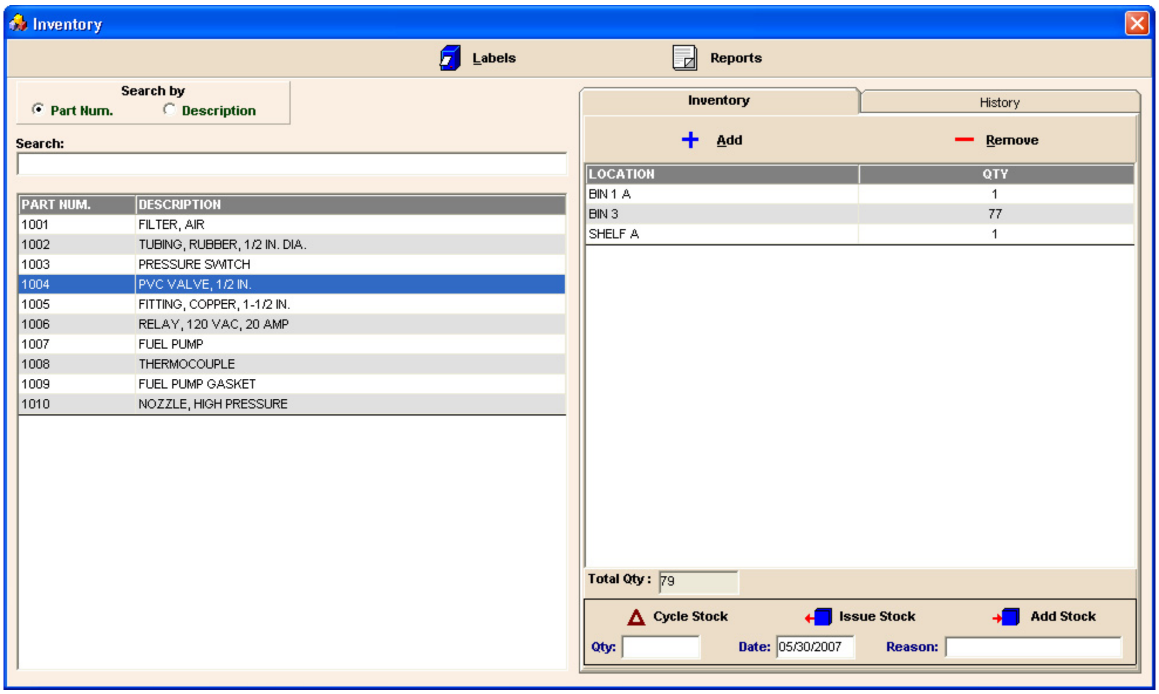
Search by part description

- Click the Description option in the Search by box.
- Begin typing the part description in the Search field. WIN-STS will automatically select the first part it finds that matches the part description you entered.

Transferring Parts

1. 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.
2. Select a location from the Current Location(s) list.
3. Select a location from the Select Destination Location list.
4. Enter the quantity you wish to transfer.
5. Click the **Transfer Part(s)** button.

Inventory Screen



The Inventory screen contains detailed information regarding the current status of parts in WIN-STS. 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-STS main button bar.

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.

Using the Search Options

Search options to locate an existing part include searching by part number or searching by part description.

Search by part number

- Click the Part Number option in the Search by box.
- Begin typing the part number in the Search field. WIN-STS will automatically select the first part it finds that matches the number you entered.

Search by part description

- Click the Description option in the Search by box.
- Begin typing the part description in the Search field. WIN-STS will automatically select the first part it finds that matches the part description you entered.

Adding a New Inventory Record

Generally, WIN-STS will manage inventory information through the use of the other screens, i.e. Receipts, Transfers, etc. 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. Click the **Save** button.

Editing an Inventory Record

You may edit, or change, some information in an inventory item's row any time you like. Select the item you wish to edit by clicking anywhere in the item's row.

- Click the **Edit** button.
- Make the desired change(s). Click the **Save** button.

Removing an Inventory Record

You may remove an inventory item any time you like. Use the following procedure to remove an inventory item.

- Select the item you wish to remove by clicking anywhere in the item's row.
- 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.

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.

Cycle Stock

The Cycle Stock function allows you to 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.

Issue Stock

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.

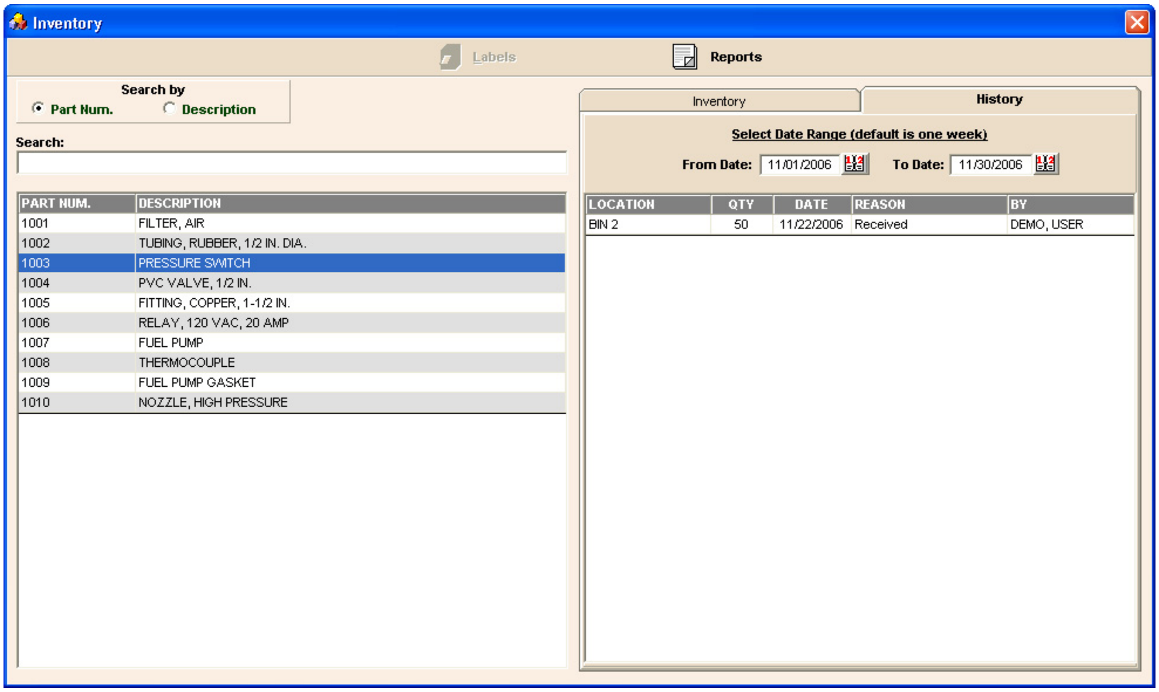
Add Stock

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.

Viewing Inventory History

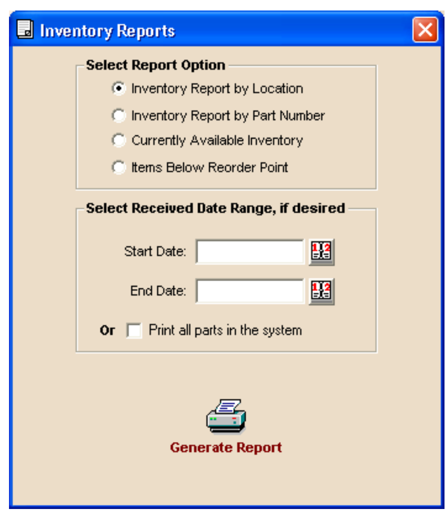


Select the History tab. Click anywhere on a row in the left-side parts list to select a part. The history of the selected part will be displayed in the right-side list. Use the From Date/To Date range to select the period for viewing history information.

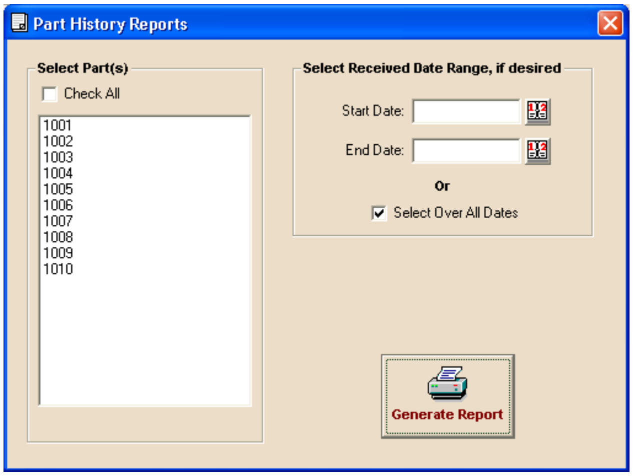
Printing Inventory Reports

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

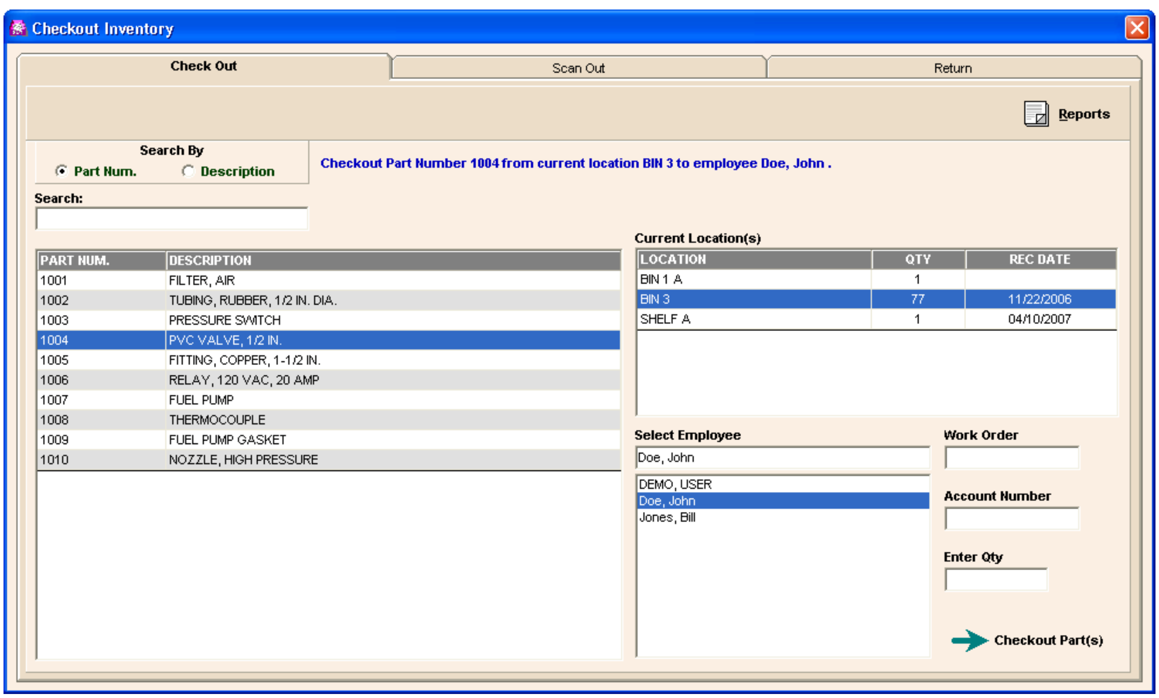


Clicking the **Generate Report** button will display a printable copy of the entire inventory history of the selected part(s). To reduce the number of returned records, uncheck the Check All box and select individual part(s). You may further reduce the number of returned records by using the Start Date/End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

Checkout Screen

The Checkout screen is used to manage checking out items from inventory. Items can be checked out either from the PC, or using the handheld scanner.

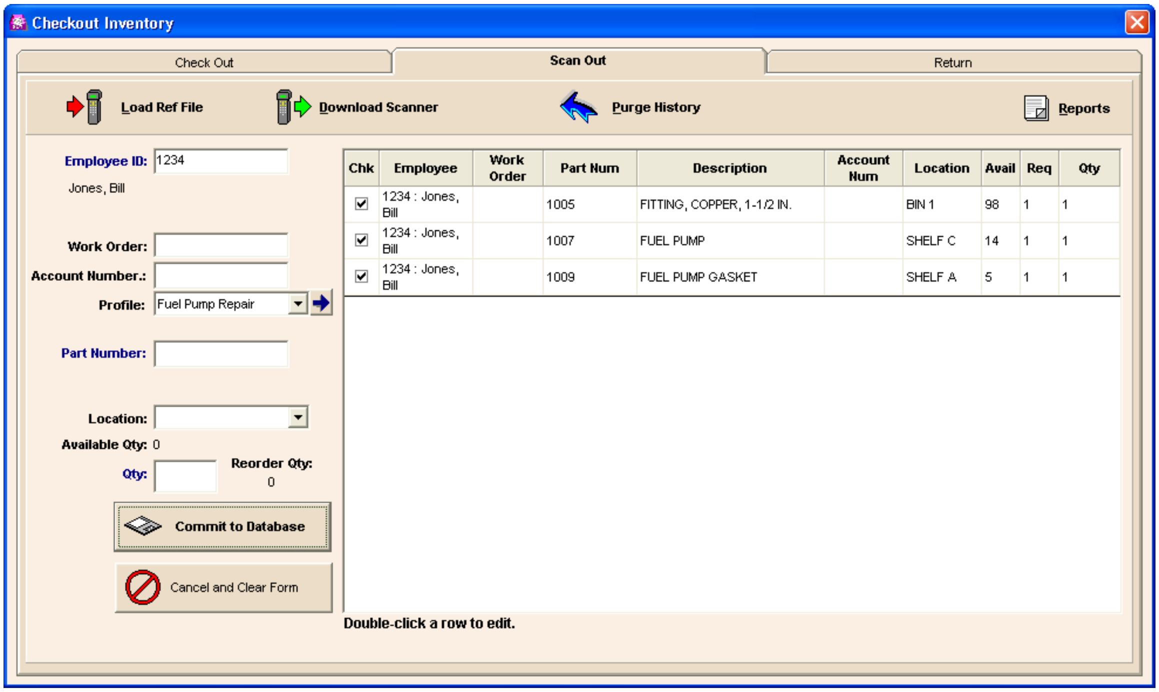
To view the Checkout screen, click the **Checkout** button on the WIN-STS main button bar.



Checking Out Items from the PC (Check Out Tab)

Select the part to be checked out from the part grid, then select the location the part is in from the Current Location(s) grid. Select the employee that is checking out the part from the employee list. Enter a Work Order and Account Number if appropriate, then enter the quantity being checked out. Click the **Checkout Part(s)** button (or press the Enter key on the keyboard after entering the quantity).

Checking Out Items from the PC (Scan Out Tab)



Enter an Employee ID in the textbox and press the Tab or Enter key. The system will search the database for the ID (this is the User ID that was entered on the User Authorization screen). If a match is found the employee's name will be displayed below the employee ID box. If a match is not found, "Unknown Employee" will be displayed.

Enter the Work Order number in the Work Order textbox. This is an optional field and can be left blank. Press the Tab or Enter key.

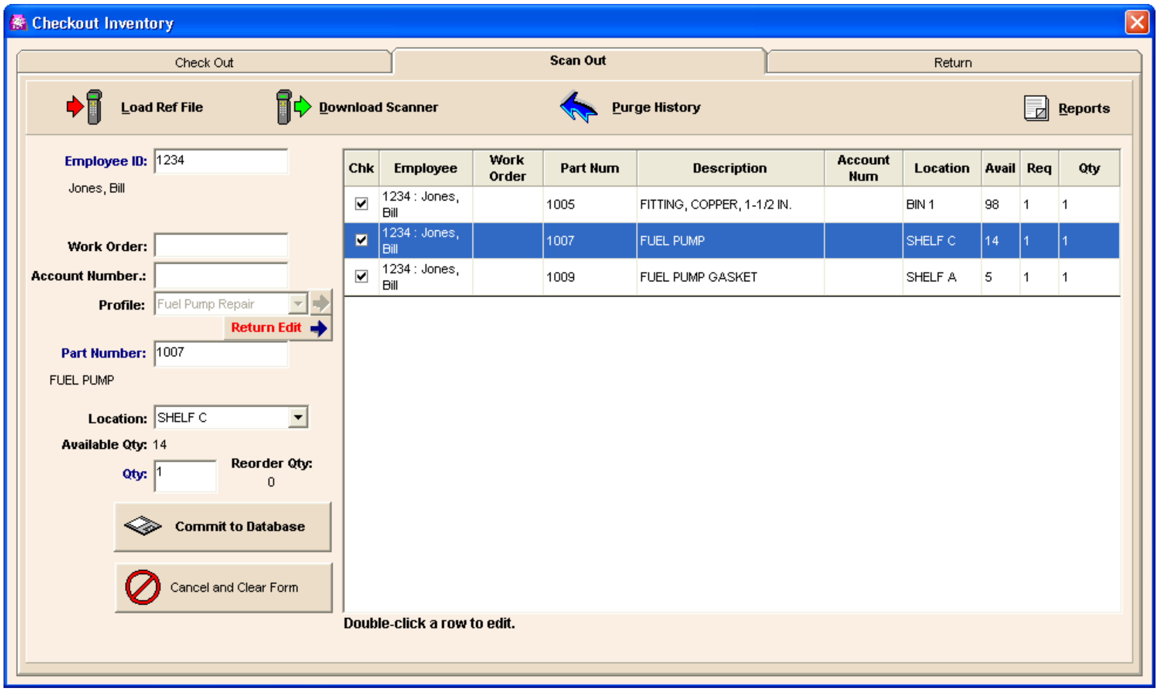
Enter the Account Number in the Account Number textbox. This is an optional field and can be left blank. Press the Tab or Enter key.

Check Out a Profile
Select a Profile from the dropdown list, if appropriate. A profile is a pre-built list of parts that are checked out together for a specific purpose. Selecting a profile speeds up the checkout process because the individual parts do not have to be entered each time.

If a profile is not being used, or additional parts are being checked out, enter the Part Number of the item to be checked out. Press the Tab or Enter key. The system will search the database for the item description, and all locations that this item is stored in, and display them in the Location dropdown list. The first location will be displayed, along with the available quantity at the location. If the item was taken from a different location than the one displayed, select it from the dropdown list.

Enter the Quantity being checked out in the Quantity textbox. Press the Tab or Enter key. The Part Number, Item Description, and Quantity will be displayed in the grid on the right, and the cursor will return to the Part Number textbox. Continue to enter the part number and quantity of all items being checked out by that employee to that work order.

If it is necessary to edit a record that has been entered in the list, double-click the row in the grid.



The checkout information will be transferred to the textboxes on the left side of the screen and a Return Edit button will appear. Make the necessary changes to the data and click the **Return Edit** button.

When all items have been entered, click the **Commit to Database** button. Only items that have the checkbox checked will be committed to the database. The entered quantities will be deducted from inventory. They will also be entered into the checkout history table in the database. The screen will clear and be ready for the next employee checkout.

Be sure to commit the checked out items for each employee/work order combination before checking out items to a different employee or work order. This is necessary to assure accurate tracking of the checked out items.

Checking Out Items with the Handheld Scanner

To load the scanner application and reference file onto the scanner, connect the scanner to the download device. Turn the scanner on, and click the **Load Ref File** button.
To use the scanner application:

- Scan or type in the EMPLOYEE ID (up to 10 characters). This is a required field.
- Scan or type in the WORK ORDER (up to 15 characters). This is optional and can be skipped by pressing the ENT key.
- Scan or type in the PART NUMBER (up to 15 characters). This is a required field.
- Scan or type in the inventory LOCATION (Bin number, etc.) (up to 10 characters). This is optional and can be skipped by pressing the ENT key.
- Type in the QUANTITY (up to 4 characters). This is a required field that cannot be zero.
- Press the ENT key to save the data. The application will return to the PART NUMBER screen. Continue to enter part numbers, locations, and quantities until you are finished.

- Press the ESC key to return to the EMPLOYEE ID screen. The scanner is now ready for the next employee to check out items.

- To DELETE the last item checked out, press the F1 key from the PART NUMBER or EMPLOYEE ID screen. You will be prompted to confirm the deletion. Press the 7 key to delete the item, or the 9 key to leave it in.

- If the screen goes blank at any time, the unit is asleep. Press any key to wake it up.

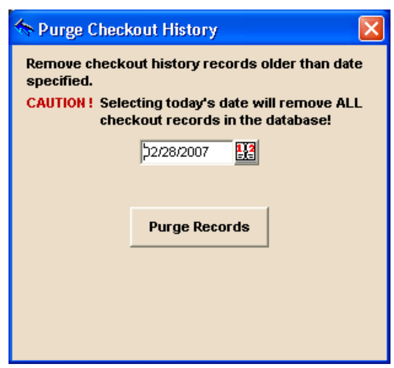
- Lock the scanner with the switch at the bottom when it is not in use. This will conserve the battery life.

Downloading the Handheld Scanner
On the Checkout screen, click the **Download Scanner** button. Place the scanner in the download device. Make sure the scanner is turned on (not locked and not asleep). Click the OK button on the message box. The data file will be downloaded to the computer, and the information processed. The scanned records will appear in the grid. If all of the information matches the information in the database, the checkbox will be checked. If the checkbox is not checked, some information is incorrect (appears in red). These records can be edited to correct the information by double-clicking on the item, as described above. Click the **Commit to Database** button to complete the checkout process. Only the items that have the checkbox checked will be committed.

**** Note: If the screen is closed before the checkout records have been committed to the database, the information will be **lost**. ****

The data file on the handheld will be cleared when the download is complete.

Purge Checkout History
The checkout history table in the database will become very large over time. Old records can be removed by clicking the **Purge History** button on the Checkout screen. A screen will appear to prompt for a date (the default is three months prior to the current date).

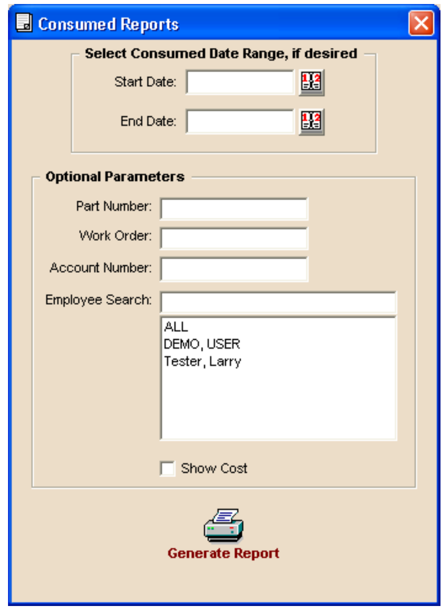


Note: Entering the current date will remove ALL checkout records from the database.

Enter the desired date, then click the **Purge Records** button. A confirmation message will be displayed. Responding Yes to the message will delete the records, responding No will leave the records in the database.

Printing Consumed Reports

Click the reports button on the Checkout screen. A report screen will appear, where report parameters can be entered. If no parameters are entered, the report will display all consumed items in the checkout history table of the database.



Enter a date range to report on all items checked out over a date range.

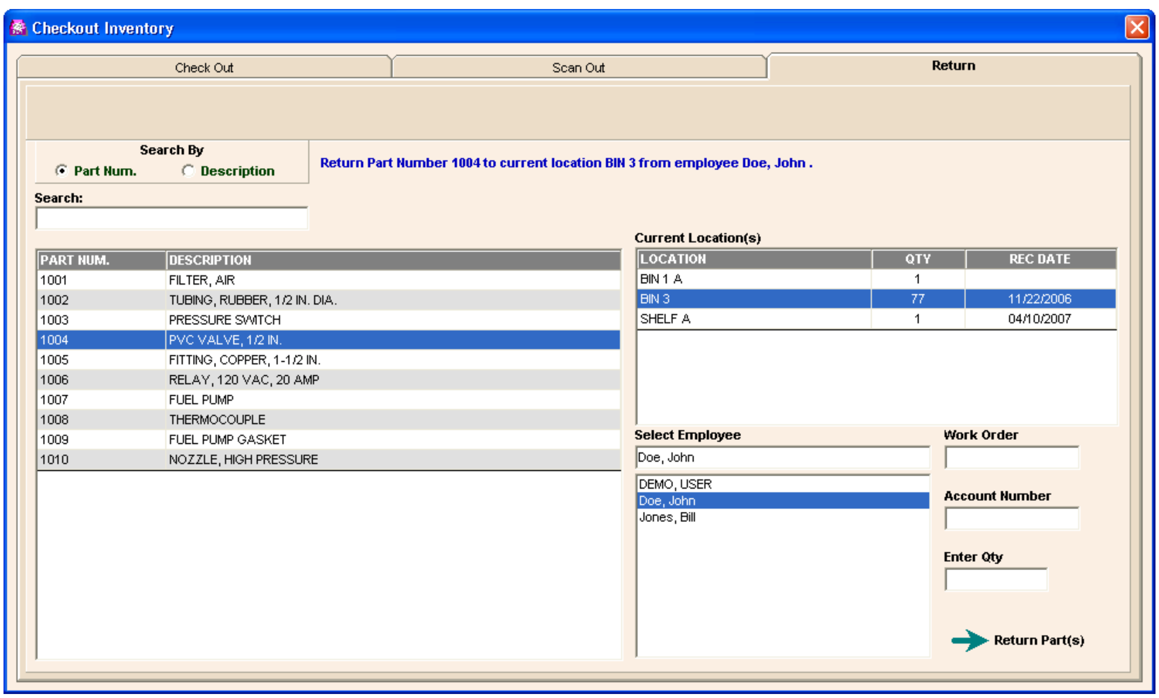
Enter a part number to report on the quantity of that item that was checked out.

Enter a work order number to report on the items checked out to a particular work order.

Enter an account number to report on the items checked out to a particular account number.

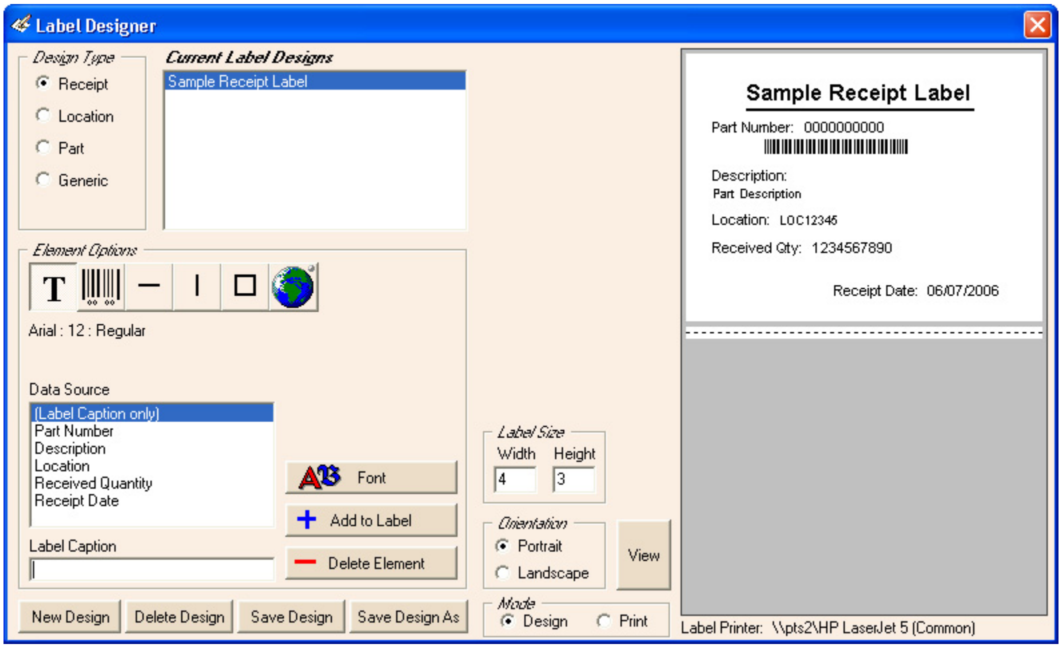
Enter an employee name to report on the items checked out by an employee.

Return Checked Out Items (Return Tab)



Select the part to be returned from the part grid, then select the location the part is being returned to from the Current Location(s) grid. Select the employee that is returning the part from the employee list. Enter a Work Order and Account Number if appropriate, then enter the quantity being returned. Click the **Return Part(s)** button (or press the Enter key on the keyboard after entering the quantity).

Label Design Screen



The Label Design screen provides the ability to custom design labels for use by WIN-STS. Custom labels are designated as one of four types: 1) Receipt, 2) Location, 3) Part, and 4) Generic. Receipt labels are used by the Receipts screen, Location labels are used by the Inventory Locations screen, Part labels are used by the Part Master screen, and Generic labels are printed from the Label Design screen. Previously created labels are listed in the Current Label Designs list. Click on any of the labels listed in the Current Label Design list to view its current design.

Creating a Custom Label

- Select the Design Type of the label you are creating from the Design Type box.
- Click the **New Design** button.

Enter the Label Size dimensions in the appropriate boxes. Label sizes up to 4x6 inches are supported. Select the orientation as Portrait or Landscape. Element options that can be added to a custom label include text fields, database fields, barcode fields, horizontal lines, vertical lines, boxes/rectangles, and graphics.

- Add as many label elements as you wish.
- Click the **Save Design** or **Save Design As** button when finished.

Adding a Text Element

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.

Adding a Database Field Text Element

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.

Adding a Barcode Element

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.

Adding a Horizontal Line Element

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.

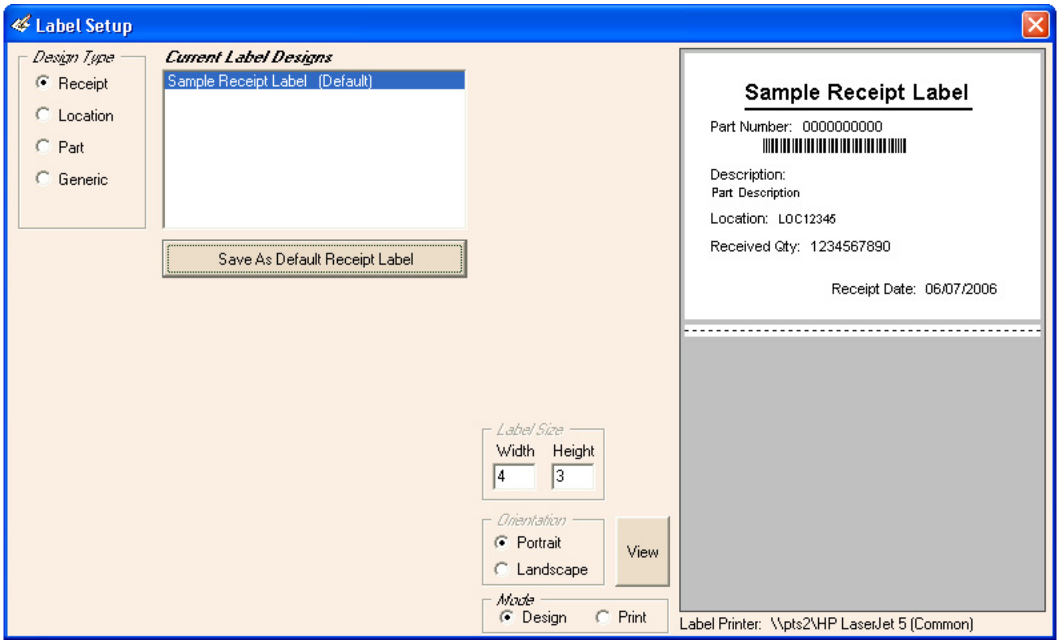
Save an Existing Design as a New Design

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 design will be printed for all received parts at the time of receipt.

Software License Agreement

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