# *i* -Global System

# Product Data Management Module User Manual





i-Global System

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Printed in Hong Kong.

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# **About This Manual**

This manual has been developed to guide you through the Product Data Management Module of i-Global System with comprehensive, step-by-step method of instruction. This manual was designed in a modular format for the purpose of grouping major topics, and placing emphasis on key product features.

This manual is organized as follows:

Section	Description					
Chapter 1	System Overview: Overviews on the Product Data Management Module, highlights features and defines terminology.					
Chapter 2	Master File Setup: Describes procedures how to set up the master records.					
Chapter 3	Item: Provides Items definition concepts and maintenance procedures of the Item Code master.					
Chapter 4	Bill of Material (BOM): Describes how to build a BOM that based on Items in the Item Code master.					
Chapter 5	Engineering Change: Shows steps and procedures to change a BOM thru Engineering Change Note (ECN).					
Chapter 6	Tool Plan: Provides Mould and Injection Material management details to achieve operation effectiveness.					
Chapter 7	Enquiry: Depicts how to enquire necessary information from the system.					
Chapter 8	Report: Gives both operational and control report generation for control and operation purposes.					
Chapter 9	Number Prefix: Defines the document number prefix for better control					
Chapter 10	Tooling Plan: Define the Mould Master and Tooling Plan of Item.					

# **Conventions Used in This Manual**

The following typeface conventions are used throughout this manual:

Bold	Bold text indicates an option to choose or text to type				
	It usually appears in numbered steps.				
Italics	Words are italicized for emphasis or to draw your attention to a new term.				
Action → Option Name	Whenever you see a reference to a menu option, the option is identified using the following notation: Menu Name $\rightarrow$ Option Name For example, "Type $\rightarrow$ Create"				

# **Icon Function**

Icon Name	Symbol	Function				
Active Task		To show all active tasks opened in the system, current task is always on the top.				
Add New	AddNew	To add a new entry.				
Approval	Approval	To approve a transaction process.				
Cancel	×	To end current process.				
Cancel	Cancel	To cancel an entry.				
Confirm	Confirm	To confirm an entry.				
Delete	Delete	To delete a record.				
Delete All	DeleteALL	To delete all records.				
Enquiry	Enquiry	To begin an enquiry process.				
Export	Export	To export data into a specific format file.				
Next	Next	To next record.				
Pop Up		To display the selection list.				
Preview	Preview	To preview a retrieved data/report.				
Process	Process	To begin a process.				
Retrieve	Retrieve	To retrieve a selected record.				
Submit	Submit	To submit an entry.				
Update	Update	To update/amend a record.				

# 1 System Overview

### 1.1 Introduction

The Product Data Management Module allows engineer build up product information, which is the heart of any manufacturing system, based on the Item and Bill-of-Material (BOM) features.



#### **1.2 Product Data Management Features**

#### Item Type

Item types identify categories of stock such as purchased, assembled, or fabricated. Item types are required for every item and should be set up according to a system-wide plan since they are used throughout the system.

#### **Item Class**

The item class code is one of the criteria for item-based planning, reports, and analysis. Item class codes are user-defined and are required when Items are created in Item Code master maintenance.

#### **Bill of Material**

A bill of material lists of all the subassemblies, intermediates, parts, and raw materials that constituted in a parent item. A bill of material also shows the quantity of each item that is required to make a standard batch of the parent item. Certain industries refer to bills of material and their display formats as formulas, recipes, and ingredient lists.

#### **Bill of Material Purpose**

A bill of material:

- Defines a product
- Ensures that all company staff and all business elements have access to the latest product definition information

These benefits arise only if all company functions share the same bill of material. Integrating information helps maintain appropriate inventory levels, delivery schedules, and accurate lead-times.

*i-Global System* requires the bill of material to be *at least* 98% accurate because planning and execution share BOM information throughout all processes.

#### **Bill of Material Levels**

A level in the bill of material defines where an item moves in and out of stock. (A phantom item would be the exception.) Bills of material can be single-level or multi-level.

#### **Single-Level Bill of Material**

A single-level bill of material lists items that are used **directly** in making a specific parent item.

#### **Multi-Level Bill of Material**

A multi-level bill of material is a series of single level bills of material linked through parent and child relationships. These relationships define the logical sequence of production.

#### **Indented Bill of Material**

*i-Global System* refers to the **printout** or **display** of a multi-level bill as an *indented* bill of material. To imagine an indented bill of material, think of an outline with sub-points positioned further to the right than major points. For example:

Parent

- 1. Assembly
- 2. Manufacturing component
- 3. Raw material
- 4. Batch
- 5. Intermediate process
- 6. Ingredients

#### **Engineering Change**

Engineering Change control is the formal process of changing Item in a BOM which may cause by the following reasons:

- Developing and introducing new products
- Improving existing products
- Refining the *manufacturing* process
- Adopting new procedures and methods

# 1.3 Terminology

Terms and meanings of product data management are described as follows.

<u>Terms</u>	<u>Definitions</u>
Alternate Item	Items are approved for substitution when the primary item is not available.
Bills of Material (BOM)	Listing of all sub-assemblies, components, and raw materials with quantity per that are constituted in a parent item.
Component	Item used to manufacture another item.
Engineering Change Notice	Formal notification specifying an engineering change.
Item	Any manufactured or purchased part.
Item Number	An alphanumeric code that identifies an item. Every item must have a unique item number.
Parent	Item made up of one or more component items.
Pegging	Ability to identify source of demand for an item.
Phantom Item	Term used to describe transient or non-stocked items.
Quantity-per	Quantity of an item is required to manufacture the parent item.
Scrap Rate	Anticipated loss within manufacture of product.
Units of Measure	Unit in which the quantity of an item is managed such as stocking, purchasing, and selling.

# 1.4 System Login

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- a. Double click the System icon from the folder.
- b. After the Login Screen is displayed, input your User ID and Password
- c. Press <Enter>

# **1.5** Workspace Components

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#### 1. Menu Bar



At Menu Bar, you can choose different functions by clicking the Function Name and then choose the screen that you want, or;

#### 2. Control Panel



At Control Panel, there are buttons for you to control the activities and processes that you want to make. The characters of buttons are in grey color while the buttons are disabled.

The most popular ones are:

AddNew Button	: Add a new entry.
Update Button	: Update a specific record and selection.
Delete Button	: Delete an existing record.
Confirm Button	: Confirm and Save a change or an addition of entry.
Cancel Button	: Cancel a change or an addition of entry.
Others include:	

- **Preview** Button : Preview reports or print out.
- Approval Button : Approval for documents, eg. Sales Quotation, Sales Order

#### Functions

#### Update

#### Steps:

- 1) View/pick the *record* that you want to update
- To Update an existing *record*, click the Update button → Update the fields you want → Click Confirm button.
- 3) To Cancel the changes, Click **Cancel** button.

#### Delete

- 1) View the *record* that you want to delete
- 2) To delete an existing *record*, click the **Delete** button.
- 3) Click **Yes** button in the *Pop Up Message* to Confirm Delete, **No** button for Cancel the deletion.

#### 3. Language Selector



At Language Selector, multi-languages are supported (English, Traditional and Simplified). You can choose the appropriate language as you like.

#### 4. Search Engine

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At Search Engine, you can select a specific Field from the Pull Down menu and type the search criteria to search a list of records.

#### Search records

#### Method 1:

- 1) Select a **Field** from the **Pull Down** menu $\rightarrow$  type the search criteria.
- 2) Click Search button.

#### Method 2:

Step:

- 1) Click **the first page** button to find the records in the first page of the *Table*; or
- 2) Click the previous page button to find the record in the previous page of the Table; or
- 3) Click the next page button to find the record in the next page of the Table; or
- 4) Click **the last page** button to find the record in the last page of the *Table*.
- 5. Last Activity List

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	System		Last Activity List
	Load ALL Description		
	Product		
	Sales		
	Item Master		

Last Activity List shows the screens that you have viewed and edited. It gives a way for you to look back the activities that you have done. Click the Pull Down Menu and view the history.

#### 6. Tab Function

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Information is divided under different Tab Functions. You can use Mouse to click the tab function or Press <Tab> buttons and <Enter> on your Keyboard to change the tab functions.

### 1.6 System Logout

When the Application System is finished, user may perform logout system to exit the system.

Steps:

1) At Menu Bar, Click button to logout the system.

### **1.7** Operation Modes of the System

This section highlights the common operation procedures of the System.

#### **A. Mouse Operation**

Users can access the system by simply using the Mouse to select the Function.

#### **B. Keyboard Operation**

#### System Menu Operation

After the Login process users may use the **<Alt>** key to toggle to the System Menu then press the underlined character key for a Function.

#### **Functional Screen Operation**

When a System function is selected, a Functional Screen will be displayed which allows the user to perform specific application functions. Users can use <**Alt- character key in** ( )> to access the command Button. Click the Command Button "AddNew(<u>A</u>)" (or press <**Alt-A**>) to return the System into the Add Mode.

#### **Examples:**

Functions	Keys
AddNew( <u>A</u> )	<alt-a></alt-a>
Update( <u>U</u> )	<alt-u></alt-u>
Delete(D)	<alt-d></alt-d>
Confirm( <u>C</u> )	<alt-c></alt-c>
Cancel( <u>N</u> )	<alt-n></alt-n>

# 2 Master File Setup

# 2.1 Project Master

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Fact H0.35408	工地重用利 - 武康重 BTB MUCK	2000/12/19	
Pick H835409	工地庫系列 - 聖路車 BTB ROLEY	2000/12/19	

### Create a new Project Number

- 1) In Master File, click Project Master.
- 2) Click AddNew button  $\rightarrow$  type **Project No.**  $\rightarrow$  press **Tab.**
- 3) Type **Project Description**→ click Confirm button.

### 2.2 Category Master

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Create a new Category

- 1) In Master File, click Category Master.
- 2) Click AddNew button.
- 3) Type Category Code, Description,
- 4) Click the Pop Up button <sup>...</sup> from the Default Unit field → double click the Default Unit you want to choose
- 5) Choose the **MBS Code** from the *Pull Down Menu*.
- 6) Enter Generate Code, Special Character, Generate Desc., Desc. Index
- 7) Click Confirm button.

# 2.3 Unit of Measurement

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10.光片				<b>1</b> #841#866	14

#### Create a new Unit

- 1) In Master File, click Unit of Measurement.
- 2) Click AddNew button  $\rightarrow$  type UOM  $\rightarrow$  press Tab.
- 3) Type **Unit Description**  $\rightarrow$  click Confirm button.

# 2.4 Color Master

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#### Create a new Color Code

- 1) In Master File, click Color Master.
- 2) Click AddNew button  $\rightarrow$  type Color Code  $\rightarrow$  press Tab.
- 3) Type **Description**  $\rightarrow$  click Confirm button.

# 2.5 Product Class Master

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Product   Sales   Material	Purchase   Production   St	docontract   Inventory	System
Main	2 T T	1	1
Product Class(*)	905		
Description(*):	Model 905 Class	12	
Lot Control (V/N)(*):	Y		
Exaction Control (1/N)(*):	Y		
Color Control(Y/N)(*):	Y		
Size Control(Y/N)(*):	Y		
Default Size Type:	1		
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Create a new Product Class

- 1) In Master File, click Product Class Master.
- 2) Click AddNew button.
- 3) Type **Product Class** and **Description**.
- 4) Type "Y" or "N" for Lot Control, Location Control, Color Control, and Size Control.
- 5) Optionally, Click the **Pop Up** button <sup>...</sup> from the **Default Size Type** field → double click the **Default Size Type** you want to choose
- 6) Click Confirm button.

# 2.6 Product Class – Account

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First of all, you need to create a *Product Class* before you create, update or delete a *Product Class Account*.

#### Create Product Class Account

- 1) In Master File, click Product Class Account.
- 2) Click AddNew button.
- 3) Select **Product Class** and **Warehouse**.
- 4) Enter the Account Codes.
- 5) Click Confirm button.

## 2.7 Engineer UM Conversion

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Before creating Engineering Unit of Measurement, you should setup Item Master, assigning UOM to the Item.

#### Create a new Engineering Unit of Measurement

- 1) In Master File, click Engineer UM Conversion.
- 2) Click AddNew button  $\rightarrow$  click the **Pop Up** button  $\cdots$  from the **Item No** field  $\rightarrow$  double click the **Item No.** you want to choose.--> related UOM will be shown.
- 3) Click the **Pop Up** button  $\cdots$  from the **EUOM** field  $\rightarrow$  double click the **UOM** you want to choose.
- 4) Type **Exchange Rate** (eg. 1PCS(UOM)=0.1 BAG(EUOM) then input "0.1" in exchange rate)
- 5) Click Confirm button.

# 2.8 Item Type Master

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Item Type is used to define different types of items in the same category or product class.

#### Create a new Item Type

- 1) In Master File, click Item Type.
- 2) Click AddNew button
- 3) Input Item Type and Description.
- 4) Click Confirm button.

### 2.9 Vendor Approval

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Create a new Vendor Approval Item

- 1) In Master File, click Vendor Approval.
- 2) Click AddNew button  $\rightarrow$  click the **Pop Up** button  $\cdots$  from the **Item No** field  $\rightarrow$  double click the **Item No** you want to choose.
- 3) Click AddNew button  $\rightarrow$  click the **Pop Up** button  $\cdots$  from the **Vendor Code** field  $\rightarrow$  double click the **Vendor Code** you want to choose.
- 4) Type ECN Engineering Reference Number in the **EER No.** field  $\rightarrow$  press **Tab**.
- 5) Type Certificate Date  $\rightarrow$  press Tab.
- 6) Type **Remark** if required.
- 7) Click Confirm button.

# 2.10 Analyse Code Master

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#### Create a new Analyse code

- 1) In Master file, click Analyse Code Master.
- 2) Click AddNew button.
- 3) Type Analyse Code and Description.
- 4) Select Analyses Class from the Pull Down Menu.
- 5) Click Confirm button.

# 3 Item

# 3.1 Item Master

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#### a) Master File

#### Create a new Item in Master File

- 1) In Item Code, click Item Master.
- Click AddNew button → type Item No. (If Item No. is auto-generated, go to Auto Item Generation Setting) and Description
- 3) Optionally, type **Chinese Description**, **Product Specific**, and **Brand Name** of the Item.
- 4) Click the **Pop Up** button  $\cdots$  from the **UOM** field  $\rightarrow$  double click the **UOM** you want to choose.
- 5) Click the **Pop Up** button  $\cdots$  from the **EUOM** field  $\rightarrow$  double click the **EUOM** you want to choose.
- 6) Click the **Pop Up** button <sup>...</sup> from the **Category Code** field → double click the **Category Code** you want to choose.

- 7) Click the **Pop Up** button  $\cdots$  from the **Product Class** field  $\rightarrow$  double click the **Product Class** you want to choose.
- 8) In case that you want to hold the Item (not released), click the **Pop Up** button <sup>...</sup> from the **Hold Code** field → double click the **Hold Code** you want to choose.
- 9) To Inactivate the Item No, select the Box **Inactive.**  $\rightarrow$  click Confirm button.

#### b) Detail File

#### Update detail information of Item

- 1) In Item Code, click Item File.
- 2) Click Detail File.
- 3) Click the **Pick** button on the left of the **Item No.** you want to update. (or use the search function to search an *Item No.*)
- 4) Click Update button and then amend the data.
- 5) Click Confirm button to confirm the input.

#### Delete detail information of Item

- 1) In Item, click Item File.
- 2) Click **Detail** button.
- 3) Click the **Pick** button on the left of the **Item No.** you want to delete  $\rightarrow$  click Delete button. (or use the search function to search an *Item No.*)
- 4) Click **OK** button to confirm the process.

#### c) Image File

#### Upload an Image/Audio File in Image File

- 1) In Item Code, click Item File.
- 2) Click **Image** button.
- 3) Click Browse button to choose the *Image/Audio* File that you want to upload.
- 4) Click Upload button to upload the Image/Audio File.

#### Enlarge an Image/Audio File in Image File

- 1) In Item, click Item File.
- 2) Click Image button.
- 3) Click Enlarge button to enlarge the *Image/Audio* File that you want to enlarge.
- 4) Click **Enlarge** button to enlarge the *Image/Audio* File.

# 3.2 Product Dimension

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Update an Item Number

- 1) In Item, click **Product Dimension**.
- 2) Click the **Pick** button on the left of the **Item No.** you want to update. (or use the search function to search an *Item No.* )
- 3) Click Update button and then amend the data.
- 4) Click Confirm button to confirm the input.
# 3.3 Custom Field

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To define the user-defined field names, go to  $System \rightarrow System \ Label \rightarrow Item \ Master \ User-Defined \ Field$ 

## Update an Item No.

- 1) To Update an existing *Item No.*, click the **Pick** button on the left of the **Item No.** you want to update. (or use the search function to search an *Item No.*)
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

# 3.4 Custom Remark

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To define the user-defined field names, go to  $System \rightarrow System \ Label \rightarrow Item \ Master User-Defined \ Field$ 

## Update a Custom Remark

- 1) To Update an existing *Item No.*, click the **Pick** button on the left of the **Item No.** you want to update. (or use the search function to search an *Item No.*)
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

# 4 Auto Item Generation

# 4.1 Segment Master

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Create a new Segment Group Name

Steps:

- 1) In Auto Item Generation, click Segment Master.
- 2) Click AddNew button.
- 3) Type Name Code. and Description.
- 4) Click Confirm button.

## Create a new Segment Name

- 1) In Auto Item Generation, click Segment Master.
- 2) Click AddNew button.
- 3) Type Name Code. and Description.

- 4) For generating as part of Item No, Type **Generate Code** and **Generate Desc.** (Generate Description)
- 5) Default
- 6) Select the Update Field that the Generate Code will be automatically shown in Item Master. (To set User-Defined Field, Please see System Module: System → (System Label →Item Master User Defined Field)
- 7) Click Confirm button.

### Update a Name Code

Steps:

- 1) To Update an existing *Name Code*, click the **Pick** button on the left of the **Name Code** you want to update. (or use the search function to search a *Name Code* )
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

#### Delete a Name Code

- To delete an existing *Name Code*, click the **Pick** button on the left of the **Name Code** you want to delete → click Delete button. (or use the search function to search a *Name Code*)
- 2) Click **OK** button to confirm the process.

# 4.2 Segment Group

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Create a new Segment Group.

Steps:

- 1) In Auto Item Generation, click Segment Group
- 2) Click AddNew button.
- 3) Click the **Pop Up** button <sup>...</sup> from the **Segment Series** field → double click the **Segment Series** (Segment Group Name) you want to choose.
- 4) Click the **Pop Up** button  $\cdots$  from the **Child Description** field  $\rightarrow$  double click the **Child Description** (Segment Name in the group) you want to choose.
- 5) Click Confirm button.

Note: Once a segment group is created, it cannot be updated. You can only delete the whole segment group, and create a new one.

# 4.3 Item Code Format

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Update an Item Code Format

- 1) In Auto Item Generation, click Item Code Format.
- To Update an existing *Item Code Format.*, click the **Pick** button on the left of the **Category Code.** you want to update. (or use the search function to search a *Category Code*)
- 3) Click Update button.
- 4) Select the Segment Series that you want to include in the Item Code and set it Format.
- 5) Optionally, if there is a need of special character in the item code format, type the **Spec.** Char.
- 6) Click Confirm button to confirm the input.

# 4.4 Item Auto Generate

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### Generate an Item Code

- 1) In Auto Item Generation, click Item Auto Generate.
- 2) Select **Category Code.** you want to update. (or use the search function to search a *Category Code*)
- 3) Select the Name Code of each Segment Series.
- 4) If Format "A" or "N" is selected in the Item Code Format, enter the *characters* or *numeric* respectively in Generate Code with Description.
- 5) Click **Chk Item** button to check if there is an existing item format for the category.
- 6) If there is no item format generated, click **Generate** button.

# 5 Bill of Material

# 5.1 BOM Maintenance

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First of all, you need to read an *Assembly Number* before you create, update, delete or copy an *Item No*. of the selected *Assembly Number*.

### Read an Assembly Number

- 1) In **Bill of Material**, click **BOM Maintenance**.
- 2) Click the Pop Up button in from the Assembly No. field → double click the Item No. you want to choose.
- 3) Press the **Read** button.

#### Create a new Item Number

Steps:

- 1) After you read the Assembly No., click AddNew button.
- 2) Click the **Pop Up** button in from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 3) Type Q/P (Eng)Quantity /Per  $\rightarrow$  press Tab.
- 4) Click the **Pop Up** button <sup>...</sup> from the **EUOM.** field → double click the **Unit** you want to choose
- 5) Input *Scrap Percentage* in the **Scrap** (%) field.
- 6) Type Location and Remark if required.
- 7) Click Confirm button.

#### Copy Bill of Material from other Assembly

Steps:

- 1) After you retrieved the Assembly No., click Copy BOM button.
- 2) Click the **Pop Up** button  $\cdots$  from the **Copy BOM** field  $\rightarrow$  double click the **Item No.** which BOM you want to copy.
- 3) Click Confirm button.

#### Update an Item Number

- 1) After you retrieved the *Assembly No.*, click the **Pick** button on the left of the **Item No.** you want to update. (or use the search function to search an *Item No.* )
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

#### Delete an Item Number

Steps:

- 1) After you retrieved the *Assembly No.*, click the **Pick** button on the left of the **Item No.** you want to delete  $\rightarrow$  click the **Delete** button. (or use the search function to search an *Item No.*)
- 2) Click **Yes** to delete the record.

### Delete All Item Numbers

- 1) After you retrieved the *Assembly No.*, click DeleteALL button.
- 2) Click **Yes** to delete all records.

# 5.2 BOM Approval

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## Approve a BOM

- 1) In **Bill of Material**, click **BOM Approval**.
- 2) Click the **Pop Up** button  $\cdots$  from the **Assembly No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 3) Press the **Read** button.
- 4) Click Approval button.

# 5.3 BOM Withhold

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### Withhold a BOM

- 1) In **Bill of Material**, click **BOM Withhold**.
- 2) Click the **Pop Up** button  $\cdots$  from the **Assembly No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 3) Press the **Read** button.
- 4) Click Confirm button.

# 5.4 Alternate Item

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First of all, you need to read an Assembly Number and an Item Number before you create, update or delete an Alternate Item of the selected Assembly Number and Item Number.

#### Read an Assembly Number and an Item Number

- 1) In **Bill of Material**, click **Alternate Item**.
- 2) Click the **Pop Up** button <sup>...</sup> from the **Assembly No.** field → double click the **Assembly No.** you want to choose
- 3) Click the **Pop Up** button  $\stackrel{\dots}{\longrightarrow}$  from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose
- 4) Press the **Read** button.

#### Create a new Alternate Item

Steps:

- 1) After you retrieved the *Assembly No.* and *Item No.*, click the **Pop Up** button  $\square$  from the **Alternate Item** field  $\rightarrow$  double click the **Item No.** you want to choose
- 2) Type **Priority** (the smaller the number , the higher the priority)  $\rightarrow$  press **Tab**.
- 3) Type **Ratio** (comparing with the alternative item)  $\rightarrow$  click Confirm button.

#### Search an Alternate Item

*Refer to Chapter 1.5 – Search Engine.* 

#### Update an Alternate Item

Steps:

- 1) After you retrieved the *Assembly No.* and *Item No.*, click the **Pick** button on the left of the **Alternate Item** you want to update. (or use the search function to search an *Alternate Item*)
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

#### Delete an Alternate Item

Steps:

- After you retrieved the Assembly No. and Item No., click the Pick button on the left of the Alternate Item you want to delete → click the Delete button. (or use the search function to search an Alternate Item )
- 2) Click **Yes** to delete the record.

#### Delete All Alternate Items

- 1) After you retrieved the *Assembly No.* and *Item No.*, click DeleteALL button to delete all Alternate Items.
- 2) Click **Yes** to confirm the process.

# 5.5 Config Bill Copy

Copy a Config Bill from the Config list of a particular Sales Order. (Note that the Config Bill of the Line Item in  $SO \rightarrow Detail Tab$  should be set as "Y")

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Copy a Config Bill

- 1) In **Bill of Material**, click **Config Bill Copy**.
- 2) Click the **Pop Up** button  $\cdots$  from the **S/O No.** field  $\rightarrow$  double click the **S/O No.** you want to choose
- 3) Click the **Pop Up** button  $\cdots$  from the **S/O Line** field  $\rightarrow$  double click the **S/O Line** you want to choose
- 4) Press the **Confirm** button.
- 5) To copy config bills of other Line Item, repeat steps 2)-4).

# 5.6 Config Bill Maintenance

After copying a Config Bill, you can edit the contents in Config Bill Maintenance.

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Create a new Item for the Config Bill

- 1) In Bill of Material, click Config Bill Maintenance.
- 2) Click the **Pop Up** button  $\stackrel{\text{...}}{\longrightarrow}$  from the **S/O No.** field  $\rightarrow$  double click the **S/O No.** you want to choose
- 3) Click the **Pop Up** button  $\cdots$  from the **S/O Line** field  $\rightarrow$  double click the **S/O Line** you want to choose.
- 4) Click the Pop Up button in from the Assembly No. field → double click the Assembly No. you want to choose.
- 5) Press the **Confirm** button.--> Press the **AddNew** button.
- 6) Click the **Pop Up** button  $\stackrel{\text{...}}{\longrightarrow}$  from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 7) Enter the Q/P (Eng), EUOM, and Scrap(%)  $\rightarrow$  Press Confirm button.

#### Search an Item

Refer to Chapter 1.5 – Search Engine.

### Update an Item Config Bill

Steps:

- 1) After you retrieved the *Item No.*, click the **Pick** button on the left of the **Item** you want to update. (or use the search function to search an *Item* )
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

#### Delete an Item in the Config Bill

Steps:

- 1) After you retrieved the *Assembly No.* and *Item No.*, click the **Pick** button on the left of the **Item** you want to delete  $\rightarrow$  click the **Delete** button. (or use the search function to search an *tem*)
- 2) Click **Yes** to delete the record.

#### Delete All Items in the Config Bill

- 1) After you retrieved the *Assembly No.* and *Item No.*, click DeleteALL button to delete all **Items**.
- 2) Click **Yes** to confirm the process.

# 6 Engineering Change

# 6.1 E.C.N. Maintenance

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### a) Master File

Create a new E.C.N. in Master File

- 1) In E.C.N., click E.C.N. Maintenance.
- 2) Click AddNew button.
- 3) Click the **Pop Up** button  $\cdots$  from the **Prefix** field  $\rightarrow$  double click the **Prefix** you want to choose.
- 4) Type the **Effective Date**.
- 5) Type **Remark** if required.
- 6) Click the Confirm button.

#### Search an ECN No.

*Refer to Chapter 1.5 – Search Engine.* 

#### Update an E.C.N. in Master File

Steps:

- 1) Click the **Pick** button on the left of the **ECN No.** you want to update. (or use the search function to search an *ECN No.*)
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

### Delete an E.C.N. in Master File

- 1) Click the **Pick** button on the left of the **ECN No.** you want to delete. (or use the search function to search an ECN No.).  $\rightarrow$  click Delete button.
- 2) Click **Yes** to confirm the process.

#### b) Detail File

#### Add detail information of E.C.N.

Steps:

- 1) In E.C.N., click E.C.N. Maintenance.
- 2) Click Detail.
- 3) Click the **Pop Up** button  $\stackrel{\cdots}{\longrightarrow}$  from the **EUOM.** field  $\rightarrow$  double click the **Unit** you want to choose.
- 4) Click the **Pop Up** button in from the **Assembly No.** field → double click the **Item** No. you want to choose.
- 5) Type Scrap (%)  $\rightarrow$  press Tab.
- 6) Select Action from the Pull Down menu  $\rightarrow$  press Tab.
- 7) Type Quantity/Per (ENG)  $\rightarrow$  press Tab.
- 8) Click the **Pop Up** button  $\stackrel{\cdots}{\longrightarrow}$  from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 9) Type Location and Remark if required.
- 10) Click Confirm button.

#### Search an Assembly No.

Refer to Chapter 1.5 – Search Engine.

#### Update detail information of E.C.N.

- 1) Click the **Pick** button on the left of the **Assembly No.** you want to update. (or use the search function to search an *ECN No.* )
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

### Delete detail information of E.C.N.

Steps:

- 1) Click the **Pick** button on the left of the **Assembly No.** you want to delete. (or use the search function to search an *ECN No.*).  $\rightarrow$  click Delete button.
- 2) Click **Yes** to confirm the process.

### Delete All detail information of E.C.N.

Steps:

- 1) Click Delete ALL button to delete all Assembly Numbers.
- 2) Click **Yes** to confirm the process.

### Approve an ECN

- 1) In E.C.N., click E.C.N. Maintenance.
- 2) Click the **Pick** button on the left of the **ECN No.** you want to approve. (or use the search function to search an *ECN No.* )
- 3) Click **Detail**  $\rightarrow$  click **Approval** button.

### Post an ECN

- 1) In E.C.N., click E.C.N. Maintenance.
- 2) Click the **Pick** button on the left of the **ECN No.** you want to post. (or use the search function to search an *ECN No.*)
- 3) Click **Detail**  $\rightarrow$  click **Post** button.

# 7 Enquiry

Enquiry can help to retrieve data on screen instantly according to various criteria.

# 7.1 Item Enquiry

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- 1) In Enquiry File, click Item Enquiry.
- 2) Click the **Pop Up** button from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose  $\rightarrow$  press **Tab**.
- 3) Enter Effective From/To Date Range.
- 4) Select **Options** from the **Pull Down** menu  $\rightarrow$  click Enquiry.

# 7.2 Category Enquiry

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- 1) In Enquiry File, click Category Enquiry.
- Click the Pop Up button in from the Category field → double click the Category Code you want to choose → press Tab.
- 3) Select **Options** from the **Pull Down** menu  $\rightarrow$  click Enquiry

# 7.3 E.C.N. Enquiry

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EN0000001	CH8-235488	M1D-50T40002A	2	2	5A	2002-03-11	8	
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- 1) In Enquiry, click E.C.N. Enquiry.
- Click the Pop Up button from the E.C.N. No. field → double click the E.C.N. No. you want to choose → press Tab.
- 3) Select **Options** from the **Pull Down** menu  $\rightarrow$  click Enquiry

# 7.4 Project Enquiry

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H935400 23-0-235409-1002 HUCK DODY RIGHT #388364	8	23-49

- 1) In Enquiry File, click Project Enquiry.
- 2) Click the Pop Up button in from the Project No. field → double click the Project
   No. you want to choose → press Tab.
- 3) Select **Options** from the **Pull Down** menu  $\rightarrow$  click Enquiry

# 7.5 Multi-Tree Item Enquiry

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Steps:

- 1) In Enquiry, click Multi-Tree Item Enquiry.
- 2) Click the **Pop Up** button is to select the *Item No*. and input criteria
- 3) Click **Reload** button.
- 4) In the below Multi-tree diagram, click "+" to view details of each folder (function).
- 5) You can use the mouse over the browser and click into see details.

Note: Similar instruction for Multi-Tree Item Details Enquiry.

# 7.6 Multi-Tree Customer Item Enquiry

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Multi-Tree Customer Item Enquiry is used to search for Item information related to specific customers.

- 1) In Enquiry, click Multi-Tree Customer-Item Enquiry.
- 2) Click the **Pop Up** button ... to select the *Customer Code*.
- 3) Optionally, select *Customer Items*, and *Item No*. and other criteria.
- 4) Click **Reload** button.
- 5) In the below Multi-tree diagram, click "+" to view details of each folder (function).
- 6) You can use the mouse over the browser and click into see details.

# 8 Number Prefix

### a) E.C.N. Prefix

### Create a new E.C.N. Prefix

Steps:

- 1) In Number Prefix, click E.C.N. Prefix.
- 2) Click AddNew button.
- 3) Type **Prefix**, **Prefix Description** and **Initial No.**
- 4) Select if the **Prefix** is the default one.
- 5) Click Confirm button to confirm the input.

## b) Segment Series Prefix

## Create a new Segment Series Prefix

- 1) In Number Prefix, click E.C.N. Prefix.
- 2) Click AddNew button.
- 3) Type Prefix, Prefix Description and Initial No.
- 4) Click Confirm button to confirm the input.

# 9 Report

Search Preview Out XML OutRTF Sexcel Analyse Next						
Search	Search & Filter results	Preview	Preview at screen			
Out XML	Export as XML format	Out RTF	Export as RTF format			
Excel Analyse	Export as excel format	Next	Next report enquiry			

All the reports in the Product Data Management Module can be:

- 1. Enquired
- 2. Retrieved
- 3. Previewed
- 4. Text Searched
- 5. Printed/Faxed/E-mailed
- 6. Exported

The following are the list of reports in the Product Data Management Module:

- a) Master File List
- b) Product Data (Dimension)
- c) Item Report
- d) Single Level BOM
- e) Indented BOM
- f) BOM History List
- g) Purchase Item

- h) Where-Top Report
- i) E.C.N. Report

### a) Master File List

## Steps:

- 1) In **Report**, click **Master File List**.
- 2) Select **List of Options** from the **Pull Down** menu.
- 3) Optionally, input the criteria.
- 4) Click **Preview** button to preview and/or print the report.

## b) Product Data (Dimension)

Steps:

- 1) In Report, click Product Data
- 2) Click **Pop Up** button ... to choose the *Item No*.
- 3) Click **Preview** button to preview and/or print the report.

### c) Item Report

- 1) In **Report**, click **Item Report**.
- 2) Type **From/To Assembly No** or click **Pop Up** button ... to choose the *Item No*.
- 3) Type **From/To Category Code** or click **Pop Up** button ... to choose the *Category Code*.
- 4) Type **From/To Description**.
- 5) Select **Options** from the **Pull Down** menu.

6) Click **Print** button to preview and/or print the report.

### d) Single Level BOM (same steps for Indented BOM, Purchase Item)

Steps:

- 1) In Report, click Single Level BOM (or Indented BOM/ Purchase Item)
- 2) Click **Pop Up** button ... to choose the *Item No*.
- 3) Click **Preview** button to preview and/or print the report.

### e) BOM History List

Steps:

- 1) In Report File, click BOM History List.
- 2) Type **From/To Assembly No** or click **Pop Up** button ... to choose the *Item No*.
- 3) Type **From/To Revision No.** or click **Pop Up** button ... to choose the *Revision Number*
- 4) Click **Preview** button to preview and/or print the report.

### f) Where-Top Report

Steps:

- 1) In Report File, click Where-Top Report.
- 2) Click **Pop Up** button ... to choose the *Item No*.
- 3) Click **Preview** button to preview and/or print the report.

### g) E.C.N. Report

- 1) In Report File, click E.C.N. Report
- 2) Type **From/To E.C.N. No** or click **Pop Up** button to choose the *E.C.N. No*.

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- 3) Tick Approval, Posted and/or All check boxes in Options if required.
- 4) Click **Preview** button to preview and/or print the report.

# **10 Tooling Plan**

# 10.1 Mould Master

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Product   Sales   Mater	tal   Purchase   Produc	tion   Subcontract   Inver	tory   System
Main	3 7 12	- 40.	11
Mould No(*):	8057-01		
Chinese Description(*)	王的家族皇		
English Description:	Front Roley		
Specification:			
Project No:		Mendor Code:	
Customer Code:	terror and terror	Customer Mould.	Second States
Make Date:	2002/5/6	Inhouse Date:	2002/3/6
Mould Size:		Cavity:	D
Maximal Mould shot :	0	QTY of Mould Sho	11
Mould Category Code:	AA	User Define1:	E
User Defne2:	100 million (17)	User Define 2:	Lawrence and
User ID:	58	Entry Date:	2002/3/14
Entry Time:	11:01:23		a construction of the second
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			In the second se
利用作			69.836

### Create a new Mould No.

- 1) In Tooling Plan, click Mould Master.
- 2) Click AddNew button  $\rightarrow$  type Mould No.  $\rightarrow$  press Tab.
- 3) Type Chinese Description  $\rightarrow$  press Tab.
- 4) Type English Specification  $\rightarrow$  press Tab.
- 5) Type **Specification**  $\rightarrow$  press **Tab**.
- 6) Type Customer Mould  $\rightarrow$  press Tab.
- 7) Type Inhouse Date  $\rightarrow$  press Tab.

- 8) Click the Pop Up button in from the Project No. field → double click the Project No. you want to choose → press Tab.
- 9) Type **Cavity**  $\rightarrow$  press **Tab**.
- 10) Type Mould Size  $\rightarrow$  press Tab.
- 11) Type **OTY of Mould Shot**  $\rightarrow$  click Confirm button.

#### Search a Mould No.

*Refer to Chapter 1.5 – Search Engine.* 

#### Update a Mould No.

Steps:

- 1) To Update an existing *Mould*, click the **Pick** button on the left of the **Mould No.** you want to update. (or use the search function to search a *Mould No.*)
- 2) Click Update button and then amend the data.
- 3) Click Confirm button to confirm the input.

#### Delete a Mould No.

- 1) To delete an existing *Mould*, click the **Pick** button on the left of the **Mould No.** you want to delete. (or use the search function to search a *Mould No.*)
- 2) Click Delete button and then click **OK** button to delete the record.

# **10.2 Mould Injection Part**

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(CELTION)				
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Chinese Description	Carl acces	07.0115		
English Description:	CAN BOOM			
Specification:		Inka	una Datas	
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Mould Side:	535*450*500	QTY	of Mould Shot 0	
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Injection Part Descri	ption(*)		100	
Gross Weight :	0.000.0	Not Weight P	0000	
Cavity:1	p	Remark:		
Community of the second	South Street	Curfam(C)	Carvest(M)	
Nould No	*	· ·	1-True 0-False	86
				10
通光机			1 日本作	ELEMENT .

Create a new Mould No.

Steps:

- 1) In Tooling Plan, click Mould Injection Part.
- 2) Click AddNew button  $\rightarrow$  Select Mould No.  $\rightarrow$  press Tab.
- 3) Type Injection Part Description, Gross Weight, Net Weight, Cavity and Remark.
- 4) Click Confirm button.

### Search a Mould No.

*Refer to Chapter 1.5 – Search Engine.* 

# **10.3** Tooling Plan Maintenance

# a) Tool Plan Entry

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Assembly No(*); Mould No(*); Color Code(*); Remarks:		утриат: D	Status
Pignart. (*) DJ. Material			
Grock D 000 Weight: D 000 Cavity: D	Type(A): Up: Cytle Tene:	0 00	Mouth Rate -
Perserka:	2209/005		Carl Const
Others	7-22		16 57
Pigmentilis			12 12
Figmentus:	-		
Pigneret 14:	-		
Pagement (11)	-		
1011010			DI INCIDENTI
206		111 12	CINY HERE

#### Create a Tool Plan

- 1) In **Tool Plan**, click **Tool Plan Maintenance**.
- Click the Pop Up button in from the Assembly No. field → double click the Assembly No. you want to choose.
- 3) Click the **Pop Up** button  $\cdots$  from the **Mould No.** field  $\rightarrow$  double click the **Mould No.** you want to choose.
- 4) Type Color Code, Revision, Status and/or Remarks if required.
- 5) Click the **Pop Up** button  $\cdots$  from the **Pigment** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 6) Click the Pop Up button <sup>III</sup> from the INJ. Material field → double click the Item No. you want to choose.
- Type Gross Weight, Type, Cavity, Up, Mould Size, PMS Code, Cycle Time, Regrind (%) and/or Remarks if required.
- 8) Click **Read** button.
- 9) Click the **Pop Up** button  $\cdots$  from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 10) Type Net Weight, Cavity and/or Up  $\rightarrow$  press Confirm button.

#### Search an Item No.

Refer to Chapter 1.5 – Search Engine.

## b) Tool Plan Amend Tab

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Assemble No: FHB-235407-USBO	工程集平利准备典文型曲器	
Nould No: 11-1520-01	7.8	
Color Code: a Revision:0 5	tatuat	
Remarks:	- Contraction and the Contraction of the Contractio	
Pigment: MID-2613906	0.09: Ast#G-13006	BAG
INJ. Material: M1A-PP7503	PP 7513	KG -
Gross Weight: 20.000 Type(A):	0.00	
Cavity: 0 Up:	D Mould Stat:	
Pees Code Cycle T	ne: II Regard(%):II.00	
Remarks:		
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	AND A CONTRACTOR OF A CONTRACTOR OFTA CONTRACT	
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## **Master Information**

First of all, you need to read an *Assembly Number* before you update, delete or copy a *Tool Plan* of the selected *Assembly Number*.

## Read an Assembly Number

- 1) In Tooling Plan, click Tooling Plan Maintenance.
- 2) Click Tooling Plan Maintenance.
- Click the Pop Up button <sup>™</sup> from the Assembly No. field → double click the Item No. you want to choose.

- 4) Click the Pop Up button <sup>™</sup> from the Mould No. field → double click the Mould No. you want to choose.
- 5) Type Color Code  $\rightarrow$  click Read button.

### Update Master Information of Tool Plan

Steps:

- 1) Click Update button and then amend the data.
- 2) Click Confirm button to confirm the input.

## Delete Master Information of Tool Plan

Steps:

- 1) Click Delete button.
- 2) Click **Yes** to confirm the process.

#### **Copy Master Information of Tool Plan**

- 1) Click Copy button.
- Click the Pop Up button in from the Assembly No. field → double click the Item No. you want to choose.
- Click the Pop Up button in from the Mould No. field → double click the Mould No. you want to choose.
- 4) Type **Color Code**  $\rightarrow$  click Confirm button.

## c) Tool Plan BOM

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Tool Flan E	stry Toal Plan Ame	internet. Tus	i Plan Dom		
Assembly N Mould No: Color Code:	01				
Accentbly Ni Item No: Q/P(Eng): EUOM: Scrap(%): Location:	0.0000				
Remark:	elume [roves]	Atomic 41	/ Centren X Cane	el S <sup>lateturn</sup>	
Ibern No	•	14	1-True 0-Fals		20
6)				建发展内部	1496

First of all, you need to read an *Assembly Number* before you create, update or delete an *Item* of the selected *Assembly Number*.

## Read an Assembly Number

- 1) In Tool Plan, click Tool Plan Maintenance.
- 2) Click Tool Plan Amendment.
- Click the Pop Up button <sup>™</sup> from the Assembly No. field → double click the Item No. you want to choose.

- 4) Click the Pop Up button <sup>™</sup> from the Mould No. field → double click the Mould No. you want to choose.
- 5) Type Color Code  $\rightarrow$  click Read button.

#### Create a new Item No.

Steps:

- 1) After you read the Assembly No., click AddNew button.
- 2) Click the **Pop Up** button  $\cdots$  from the **Item No.** field  $\rightarrow$  double click the **Item No.** you want to choose.
- 3) Type **Q/P** (Eng).
- 4) Click the **Pop Up** button <sup>m</sup> from the **EUOM** field → double click the **EUOM** you want to choose.
- 5) Type **Scrap(%)** and **Location**.
- 6) Type **Remarks** if required.
- 7) Click Confirm button.

## Search an Item No.

Refer to Chapter 1.5 – Search Engine.

#### Update an Item No.

Steps:

- After you read the Assembly No., click the Pick button on the left of the Item No. you want to update → click Update button. (or use the search function to search an Item No. )
- 2) Amend the data and then click Confirm button to confirm the input.

#### Delete an Item No.

Steps:

- After you read the Assembly No., click the Pick button on the left of the Item No. you want to delete → click the Delete button. (or use the search function to search an Item No.)
- 2) Click **Yes** to confirm the process.

#### Delete All Item Numbers

- 1) After you read the *Assembly No.*, click DeleteALL button to delete all **Item Numbers**.
- 2) Click **Yes** to delete all records.

## 10.4 Mould List / Mould-Injection List

Steps:

- 1) In Tooling Plan, click Mould list /Mould-Injection List
- 2) Click **Pop Up** button ... to choose the *Mould No*.
- 3) Click **Preview** button to preview and/or print the report.

# **10.5 Tooling Plan Report**

- 1) In Tooling Plan, click Tooling Plan Report
- 2) Click Pop Up button to choose the *Item No*.
- 3) Click **Preview** button to preview and/or print the report.