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***i* -Global System**

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Product Data Management Module  
User Manual



*i*-Global System

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Product Data Management Module User Manual -- Version: 1.02

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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.

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## 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

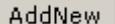
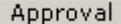
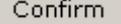
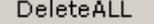
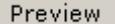
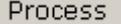
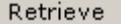
Whenever you see a reference to a menu option, the option is identified using the following notation:

Menu Name → Option Name

For example, “Type → Create”

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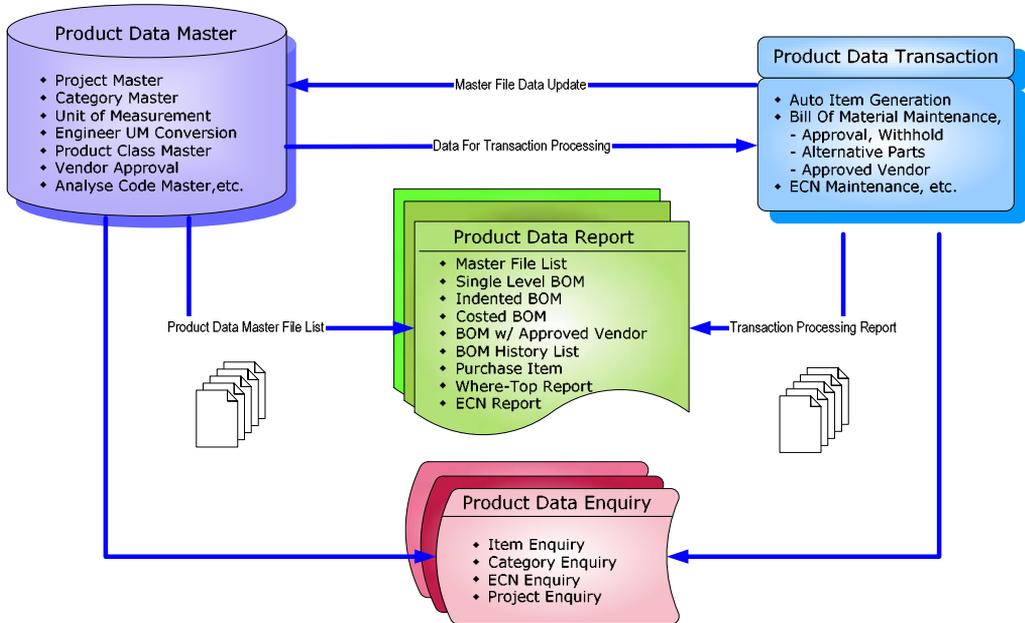
## Icon Function

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

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

## 1.4 System Login

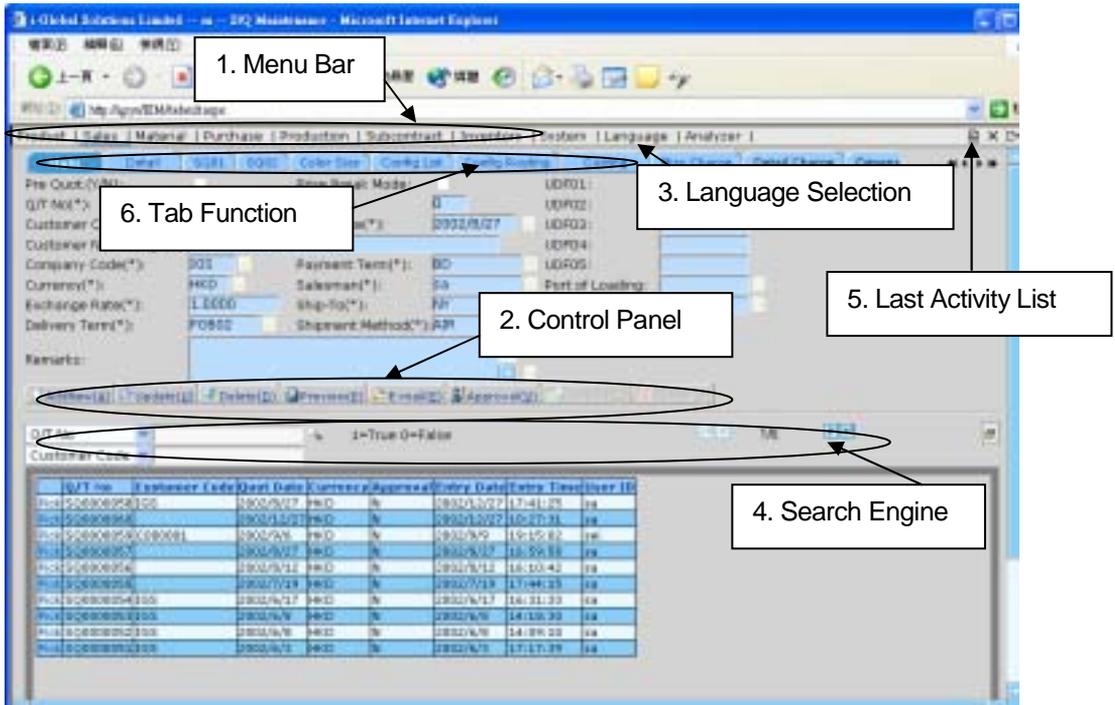


Steps:

- 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

Eg. Screen of Sales Quotation

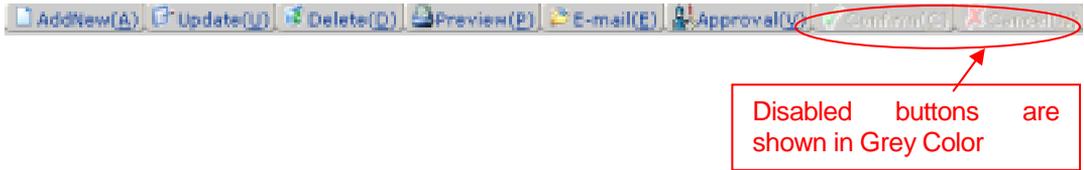


## 1. Menu Bar



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:

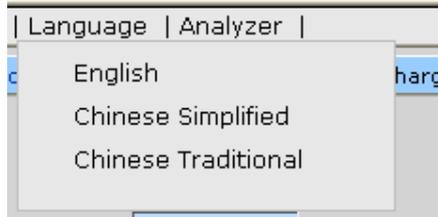
- 1) View/pick the *record* that you want to update
- 2) To Update an existing *record*, click the **Update** button → Update the fields you want → Click **Confirm** button.
- 3) To Cancel the changes, Click **Cancel** button.

### *Delete*

Steps:

- 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



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:

Steps:

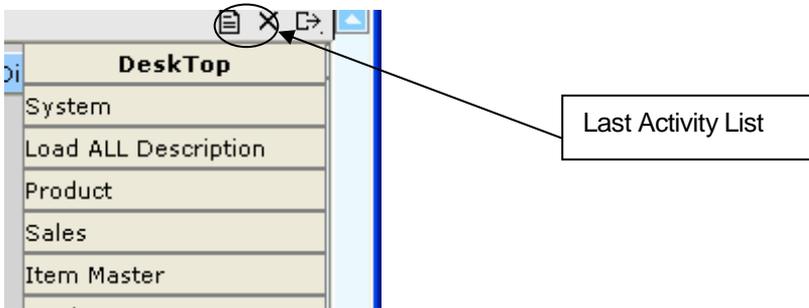
- 1) Select a **Field** from the **Pull Down** menu → type the search criteria.
- 2) Click **Search** button.

**Method 2:**

Step:

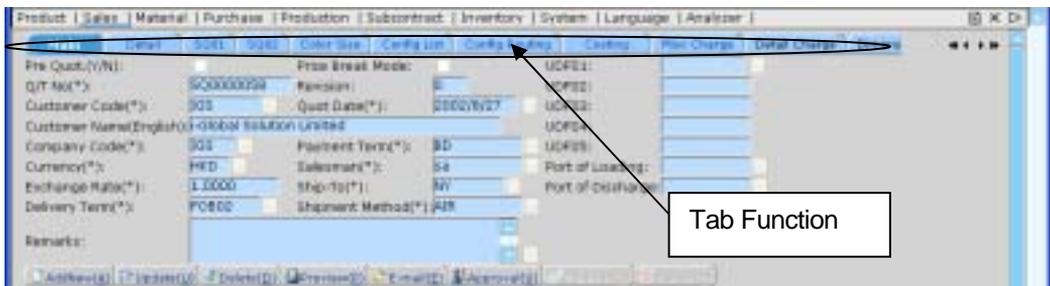
- 1) Click **the first page** button to find the records in the first page of the *Table*; or
- 2) Click **the previous page** button to find the record in the previous page of the *Table*; or
- 3) Click **the next page** button to find the record in the next page of the *Table*; or
- 4) Click **the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

**5. Last Activity List**



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**



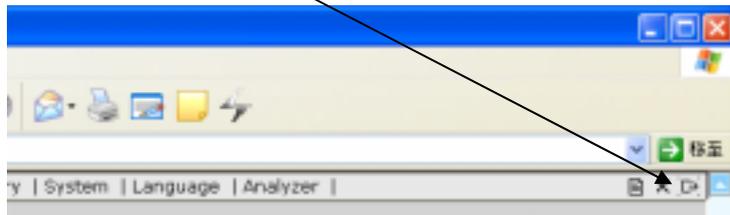
Information is divided under different Tab Functions. You can use Mouse to click the tab function or Press <Tab> buttons and <Enter> on your Keyboard to change the tab functions.

## 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

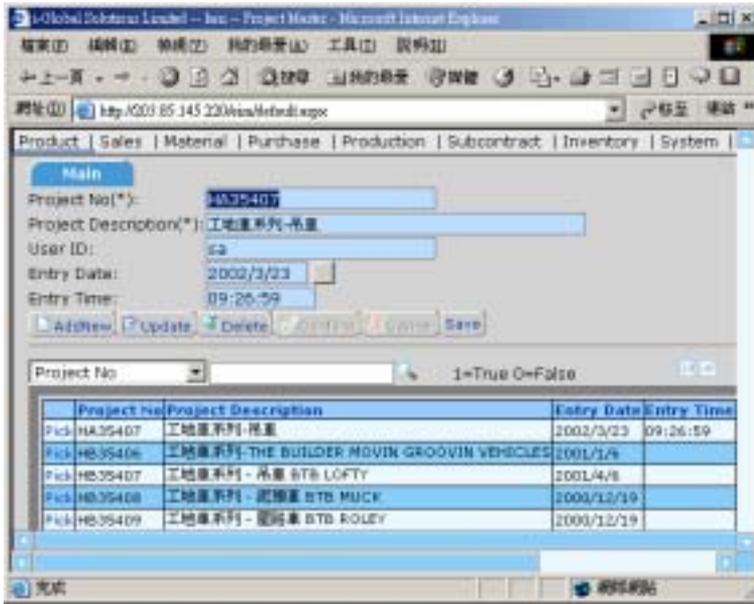
When a System function is selected, a Functional Screen will be displayed which allows the user to perform specific application functions. Users can use <Alt- character key in ( )> to access the command Button. Click the Command Button “AddNew(A)” (or press <Alt-A>) to return the System into the Add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

#### Examples:

Functions	Keys
AddNew( <u>A</u> )	<Alt-A>
Update( <u>U</u> )	<Alt-U>
Delete( <u>D</u> )	<Alt-D>
Confirm( <u>C</u> )	<Alt-C>
Cancel( <u>N</u> )	<Alt-N>

## 2 Master File Setup

### 2.1 Project Master

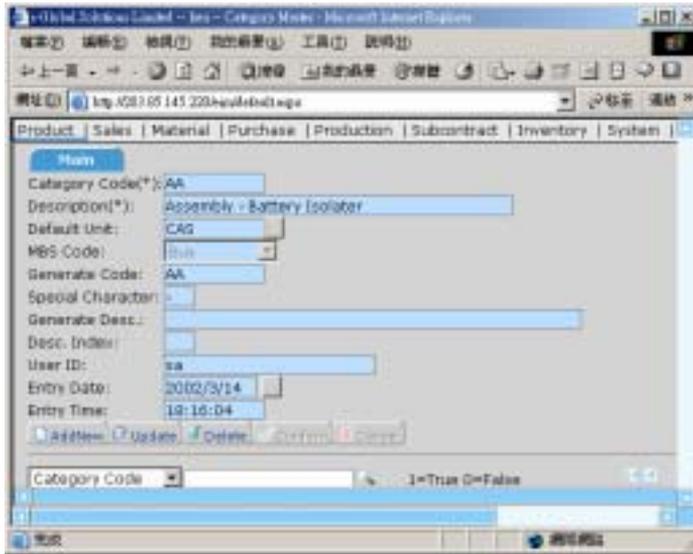


#### *Create a new Project Number*

Steps:

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

## 2.2 Category Master

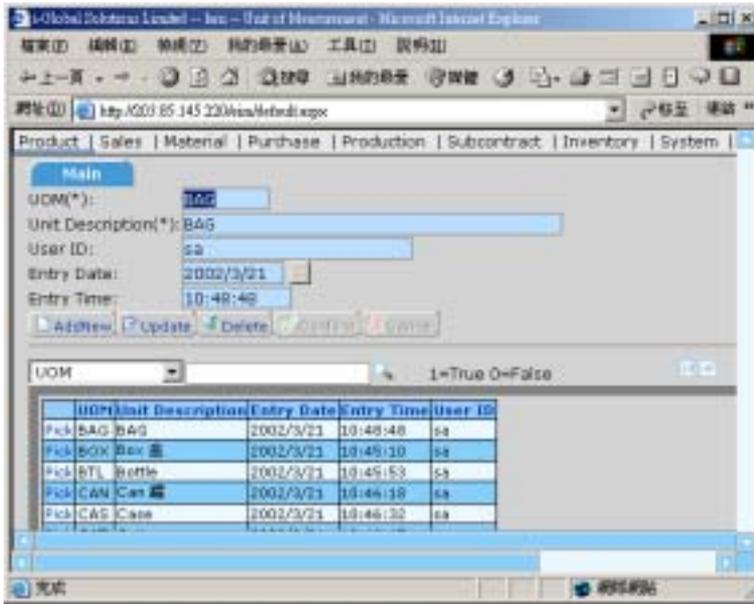


### Create a new Category

Steps:

- 1) In **Master File**, click **Category Master**.
- 2) Click **AddNew** button.
- 3) Type **Category Code, Description,**
- 4) Click the **Pop Up** button  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

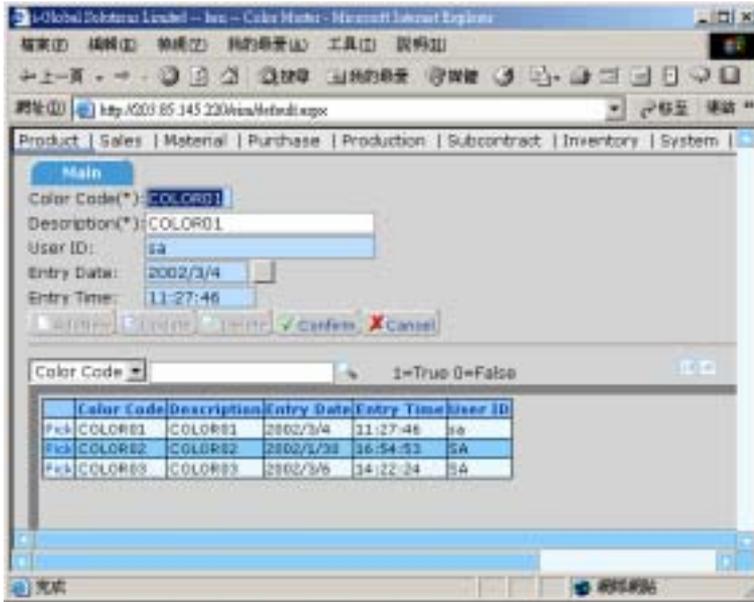


### *Create a new Unit*

Steps:

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

## 2.4 Color Master

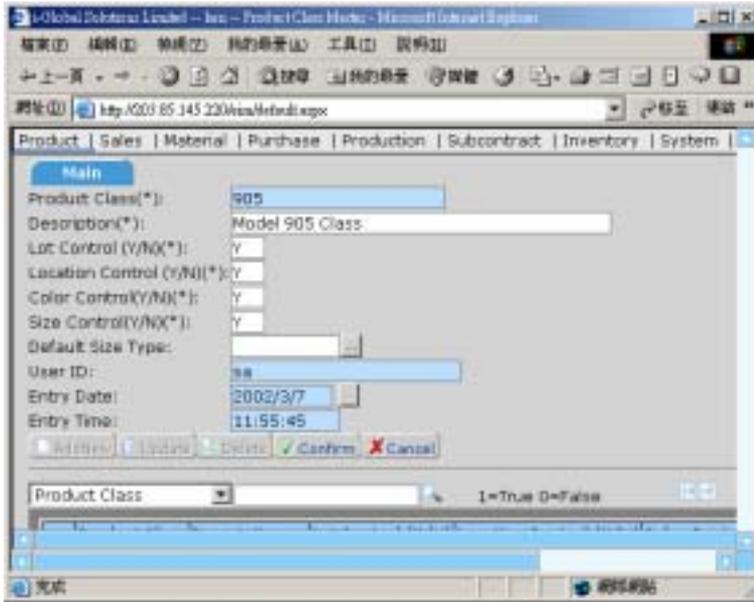


### *Create a new Color Code*

Steps:

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

## 2.5 Product Class Master

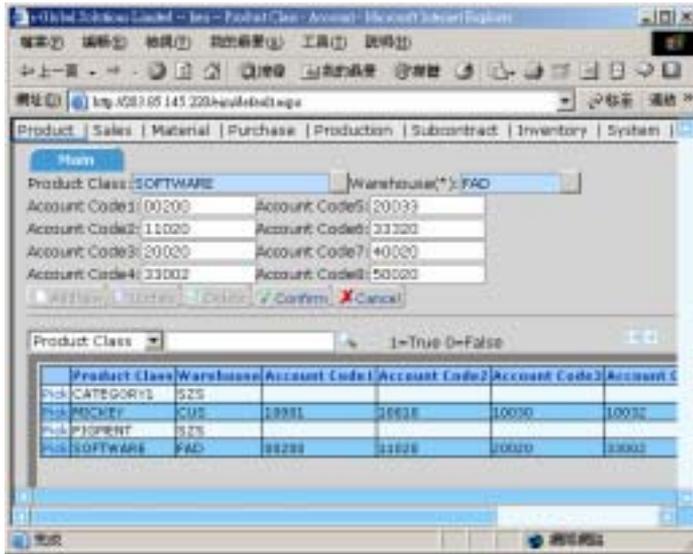


### *Create a new Product Class*

Steps:

- 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  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



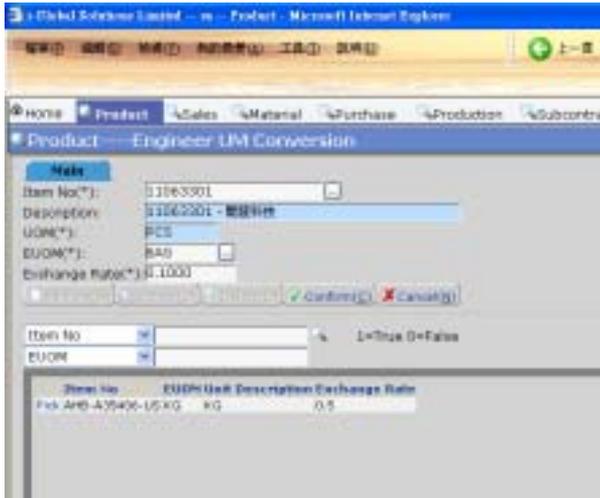
First of all, you need to create a *Product Class* before you create, update or delete a *Product Class Account*.

### Create Product Class Account

Steps:

- 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



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

### *Create a new Engineering Unit of Measurement*

Steps:

- 1) In **Master File**, click **Engineer UM Conversion**.
- 2) Click **AddNew** button → click the **Pop Up** button **...** from the **Item No** field → double click the **Item No.** you want to choose.--> related UOM will be shown.
- 3) Click the **Pop Up** button **...** from the **EUOM** field → 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

The screenshot shows a web application interface for 'Item Type Master'. The browser title is 'Product - Microsoft Internet Explorer'. The page has a navigation menu with 'Home', 'Product', 'Sales', 'Material', 'Purchase', and 'Production'. The main content area is titled 'Product---Item Type Master' and contains a 'Main' section with the following fields: 'Item Type(\*)' with value 'FG', 'Description(\*)' with value 'Finished Goods', 'User ID' with value 'sa', 'Entry Date' with value '2003/6/2', and 'Entry Time' with value '17:43:42'. Below these fields are 'AddNew' and 'Confirm' buttons. At the bottom, there is a table with columns 'Item Type', 'Description', 'Entry Date', and 'Entry Time', and a legend '1=True 0=False'.

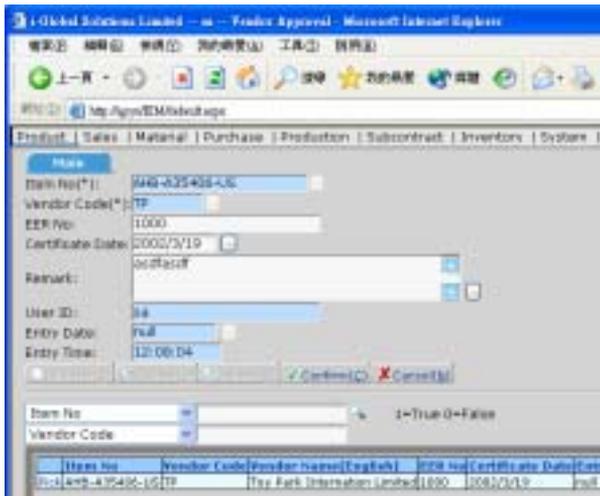
Item Type is used to define different types of items in the same category or product class.

### *Create a new Item Type*

Steps:

- 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

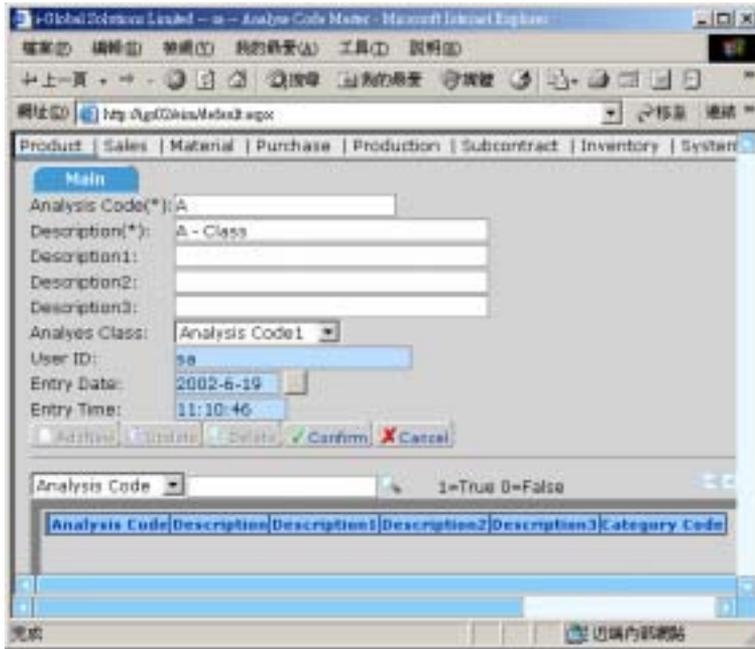


### Create a new Vendor Approval Item

Steps:

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

## 2.10 Analyse Code Master

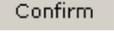


### *Create a new Analyse code*

Steps:

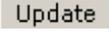
- 1) In **Master file**, click **Analyse Code Master**.
- 2) Click **AddNew** button.
- 3) Type **Analyse Code** and **Description**.
- 4) Select **Analyses Class** from the Pull Down Menu.
- 5) Click **Confirm** button.



- 7) Click the **Pop Up** button  from the **Product Class** field → 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  from the **Hold Code** field → double click the **Hold Code** you want to choose.
- 9) To Inactivate the Item No, select the Box **Inactive**. → click  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  button and then amend the data.
- 5) Click  button to confirm the input.

#### ***Delete detail information of Item***

Steps:

- 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 → click  button. (or use the search function to search an *Item No.* )
- 4) Click **OK** button to confirm the process.

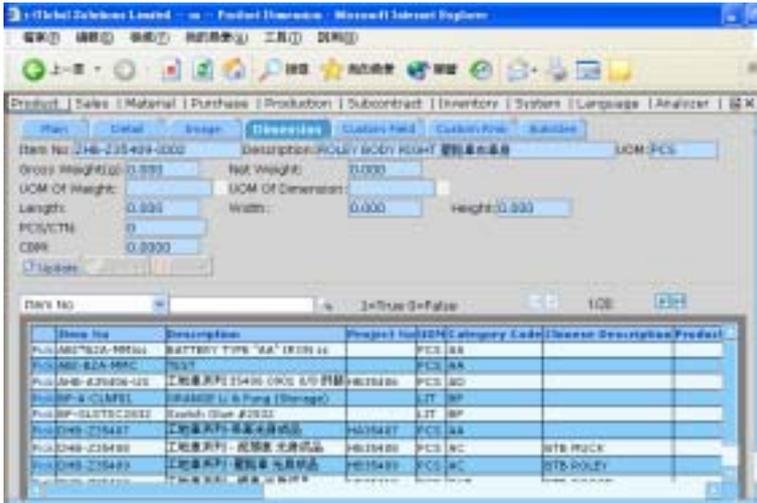
***c) Image File******Upload an Image/Audio File in Image File***

- 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

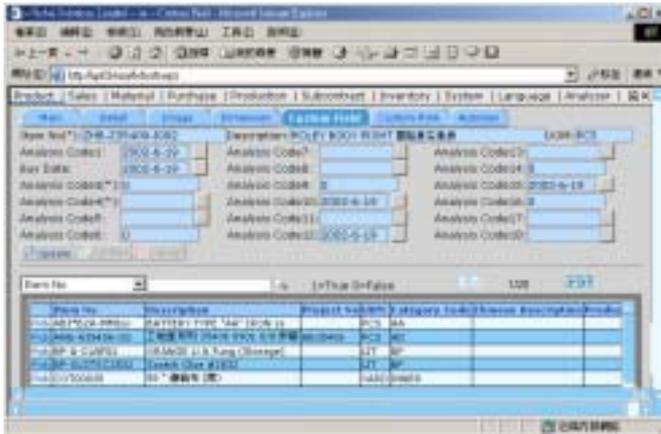


### Update an Item Number

Steps:

- 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



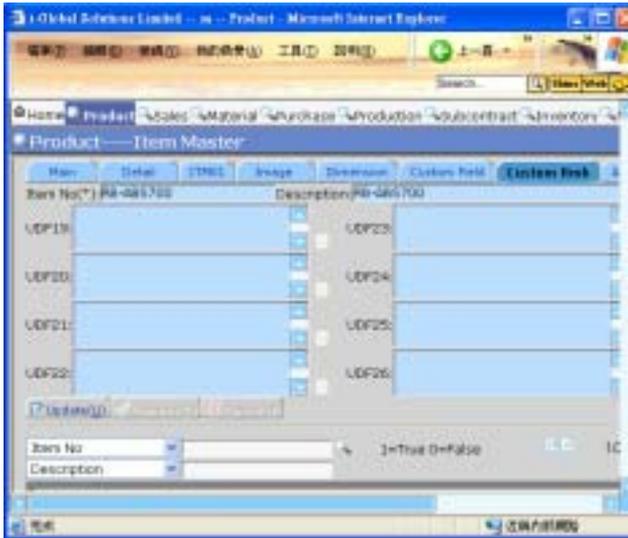
To define the user-defined field names, go to *System* → *System Label* → *Item Master User-Defined Field*

#### *Update an Item No.*

Steps:

- 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



To define the user-defined field names, go to *System* → *System Label* → *Item Master User-Defined Field*

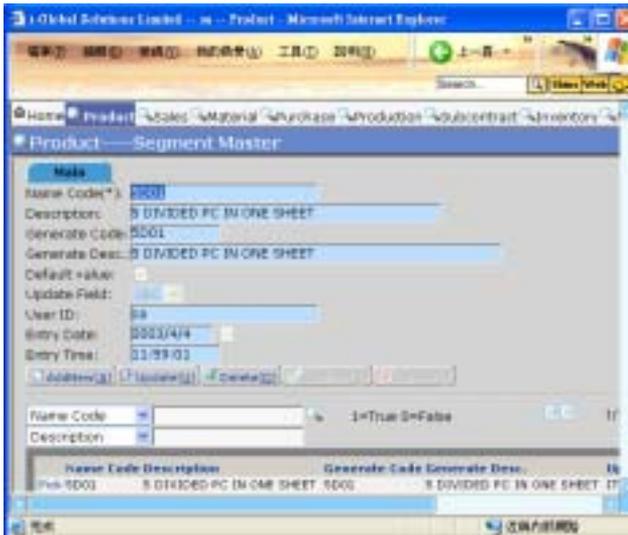
#### ***Update a Custom Remark***

Steps:

- 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



#### *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*

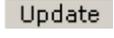
Steps:

- 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  button.

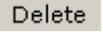
### ***Update a Name Code***

Steps:

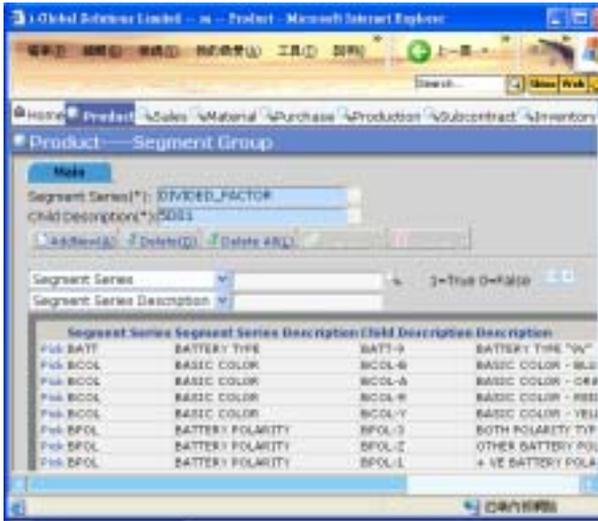
- 1) To Update an existing *Name Code*, click the **Pick** button on the left of the **Name Code** you want to update. (or use the search function to search a *Name Code* )
- 2) Click  button and then amend the data.
- 3) Click  button to confirm the input.

### ***Delete a Name Code***

Steps:

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

## 4.2 Segment Group



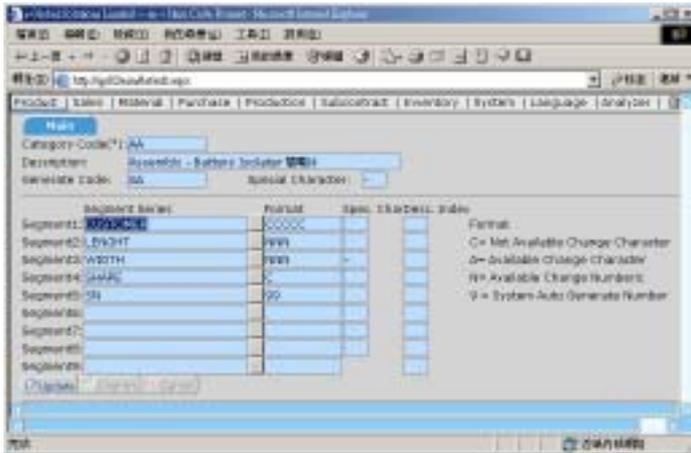
### *Create a new Segment Group.*

Steps:

- 1) In **Auto Item Generation**, click **Segment Group**
- 2) Click **AddNew** button.
- 3) Click the **Pop Up** button **...** from the **Segment Series** field → double click the **Segment Series** (Segment Group Name) you want to choose.
- 4) Click the **Pop Up** button **...** from the **Child Description** field → 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

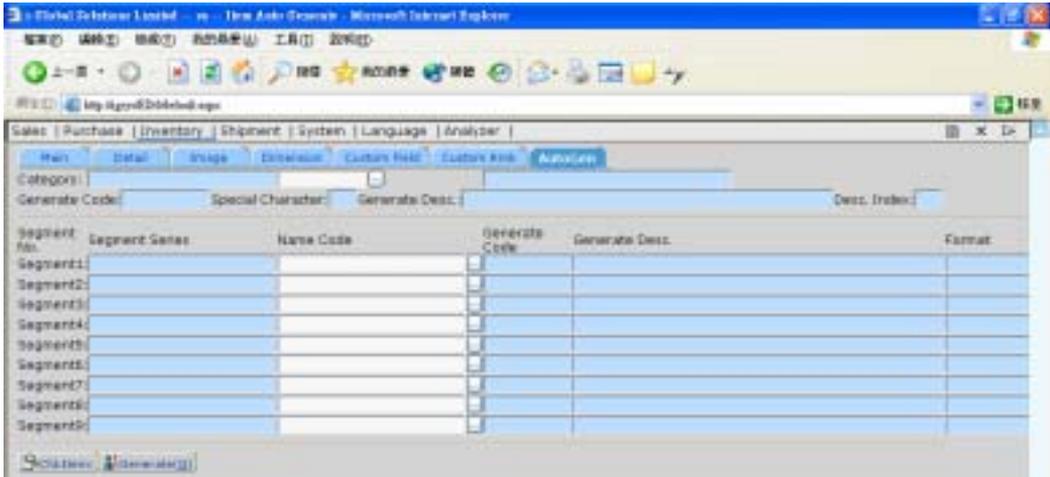


#### *Update an Item Code Format*

Steps:

- 1) In **Auto Item Generation**, click **Item Code Format**.
- 2) 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



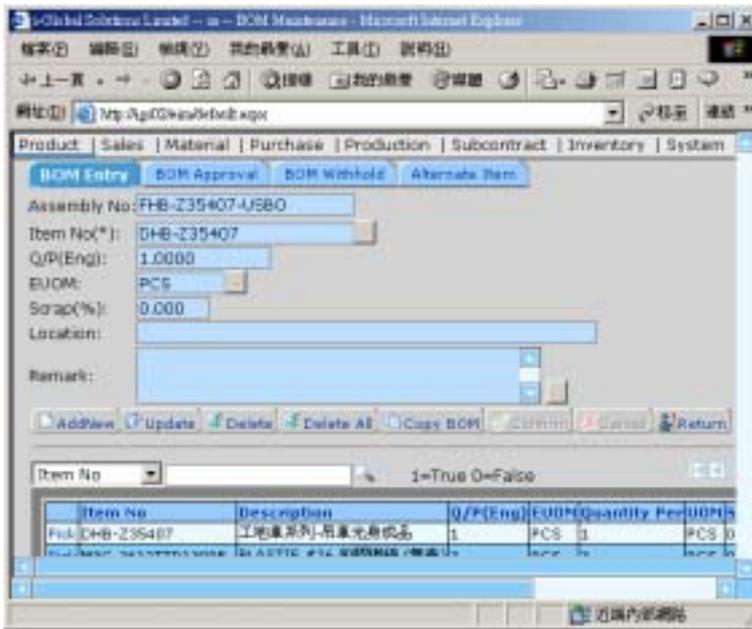
### *Generate an Item Code*

Steps:

- 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



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*

Steps:

- 1) In **Bill of Material**, click **BOM Maintenance**.
- 2) Click the **Pop Up** button  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  from the **Item No.** field → double click the **Item No.** you want to choose.
- 3) Type **Q/P (Eng)**Quantity /Per → press **Tab**.
- 4) Click the **Pop Up** button  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  from the **Copy BOM** field → double click the **Item No.** which BOM you want to copy.
- 3) Click **Confirm** button.

### ***Update 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 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:

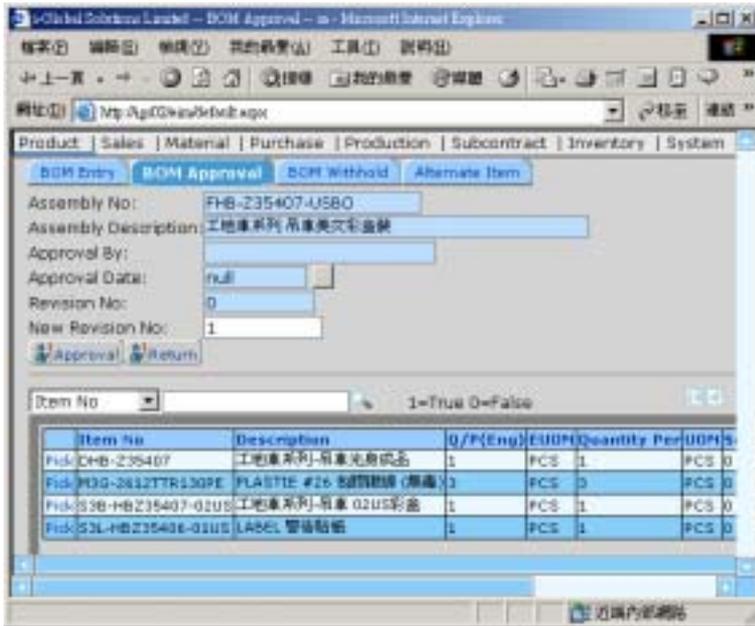
- 1) After you retrieved the *Assembly No.*, click the **Pick** button on the left of the **Item No.** you want to delete → click the **Delete** button. (or use the search function to search an *Item No.* )
- 2) Click **Yes** to delete the record.

***Delete All Item Numbers***

Steps:

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

## 5.2 BOM Approval

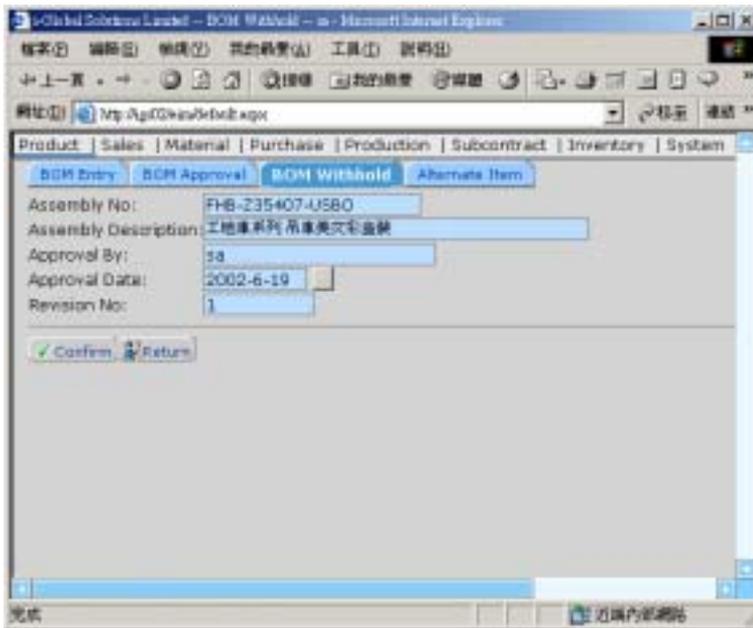


### Approve a BOM

Steps:

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

### 5.3 BOM Withhold

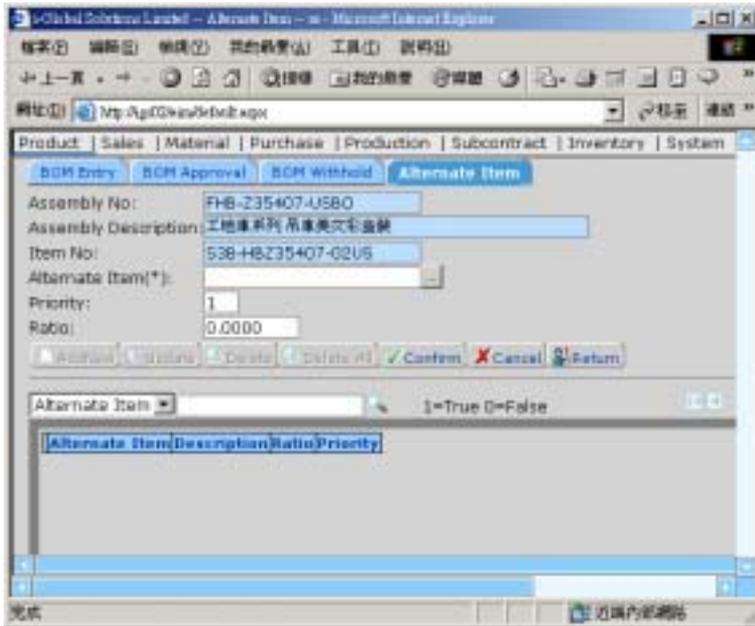


#### *Withhold a BOM*

Steps:

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

## 5.4 Alternate Item



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***

Steps:

- 1) In **Bill of Material**, click **Alternate Item**.
- 2) Click the **Pop Up** button  from the **Assembly No.** field → double click the **Assembly No.** you want to choose
- 3) Click the **Pop Up** button  from the **Item No.** field → 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  from the **Alternate Item** field → double click the **Item No.** you want to choose
- 2) Type **Priority** (the smaller the number , the higher the priority)→ press **Tab**.
- 3) Type **Ratio** (comparing with the alternative item) → click  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  button and then amend the data.
- 3) Click  button to confirm the input.

### ***Delete 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 delete → click the  button. (or use the search function to search an *Alternate Item* )
- 2) Click **Yes** to delete the record.

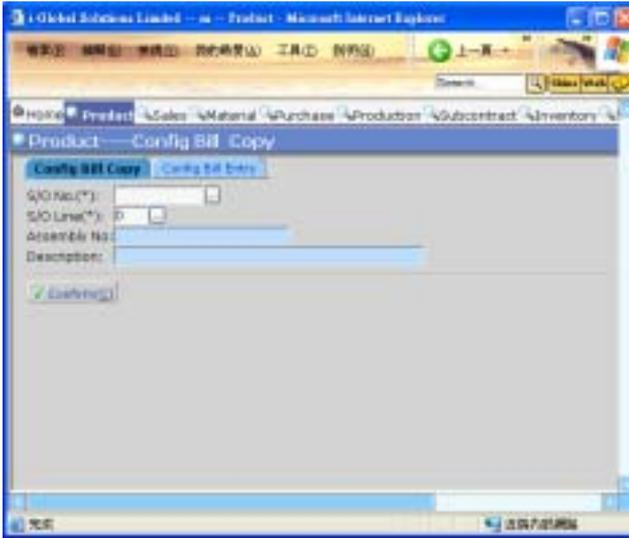
### ***Delete All Alternate Items***

Steps:

- 1) After you retrieved the *Assembly No.* and *Item No.*, click  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* → *Detail Tab* should be set as “Y”)



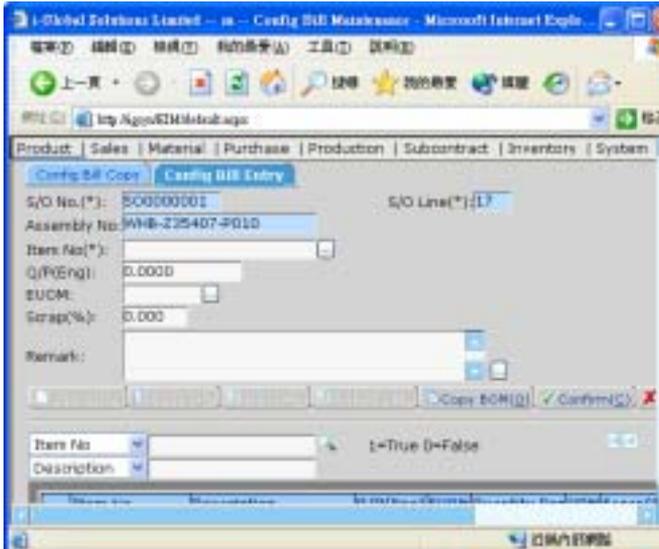
### *Copy a Config Bill*

Steps:

- 1) In **Bill of Material**, click **Config Bill Copy**.
- 2) Click the **Pop Up** button  from the **S/O No.** field → double click the **S/O No.** you want to choose
- 3) Click the **Pop Up** button  from the **S/O Line** field → 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.



### Create a new Item for the Config Bill

Steps:

- 1) In **Bill of Material**, click **Config Bill Maintenance**.
- 2) Click the **Pop Up** button  from the **S/O No.** field → double click the **S/O No.** you want to choose
- 3) Click the **Pop Up** button  from the **S/O Line** field → double click the **S/O Line** you want to choose.
- 4) Click the **Pop Up** button  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  from the **Item No.** field → double click the **Item No.** you want to choose.
- 7) Enter the **Q/P (Eng)**, **EUOM**, and **Scrap(%)** → 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 → click the **Delete** button. (or use the search function to search an *tem* )
- 2) Click **Yes** to delete the record.

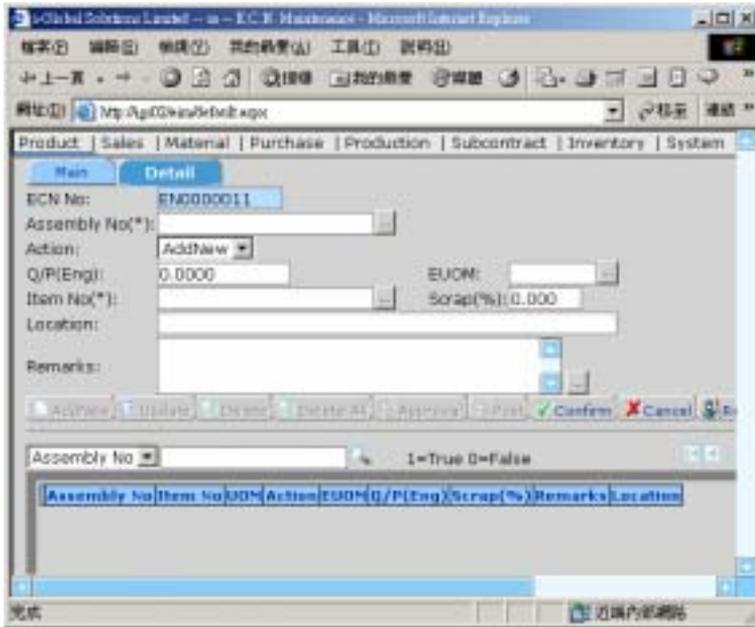
### ***Delete All Items in the Config Bill***

Steps:

- 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



#### a) Master File

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

Steps:

- 1) In **E.C.N.**, click **E.C.N. Maintenance**.
- 2) Click **AddNew** button.
- 3) Click the **Pop Up** button  from the **Prefix** field → 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***

Steps:

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

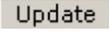
**b) Detail File****Add detail information of E.C.N.**

Steps:

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

**Search an Assembly No.***Refer to Chapter 1.5 – Search Engine.***Update detail information of E.C.N.**

Steps:

- 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  button and then amend the data.
- 3) Click  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.* ) → click **Delete** button.
- 2) Click **Yes** to confirm the process.

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

Steps:

- 1) Click **DeleteALL** 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** → 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** → click **Post** button.

## 7 Enquiry

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

### 7.1 Item Enquiry



Steps:

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

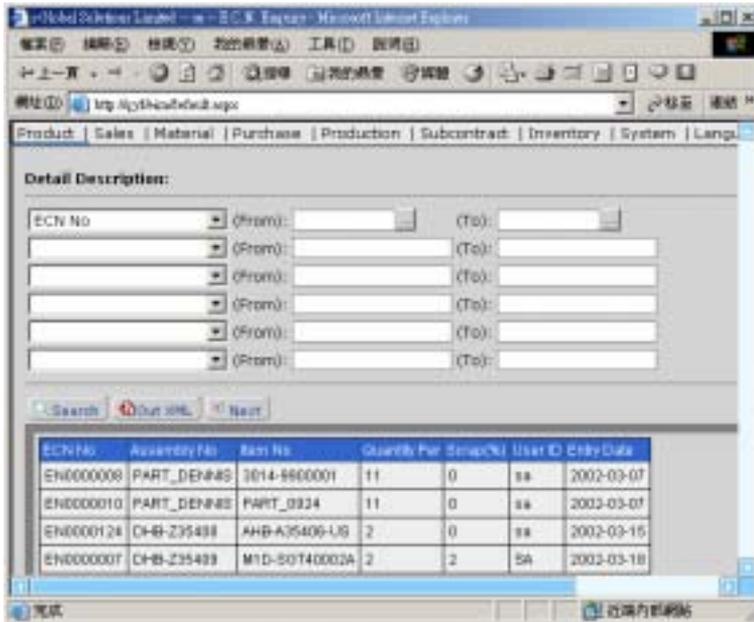
## 7.2 Category Enquiry



Steps:

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

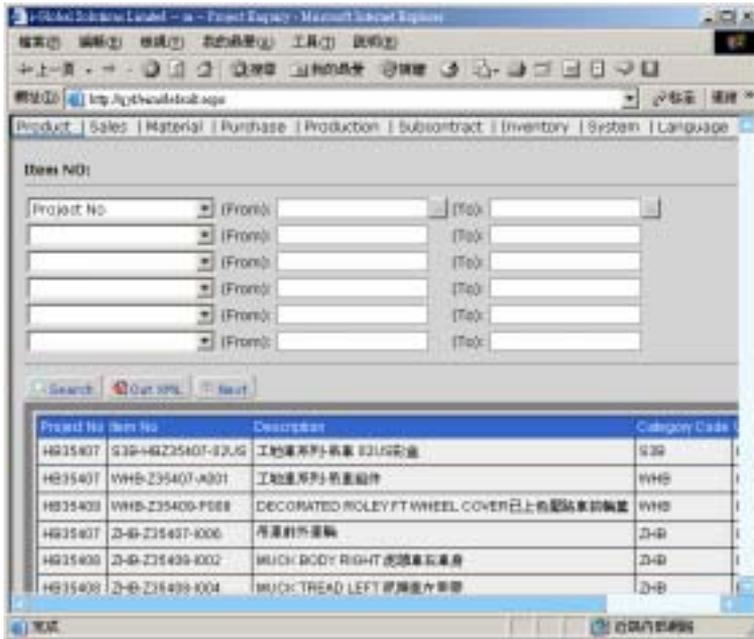
### 7.3 E.C.N. Enquiry



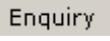
Steps:

- 1) In **Enquiry**, click **E.C.N. Enquiry**.
- 2) 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 → click **Enquiry**.

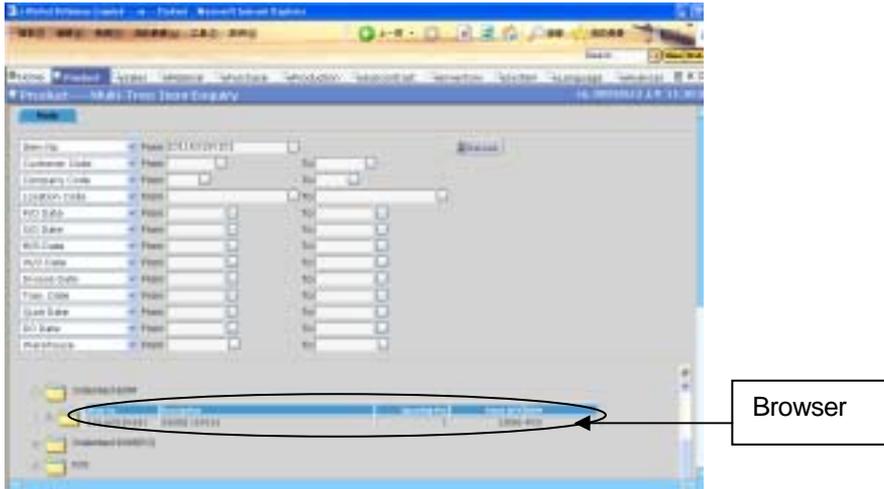
## 7.4 Project Enquiry



Steps:

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

## 7.5 Multi-Tree Item Enquiry

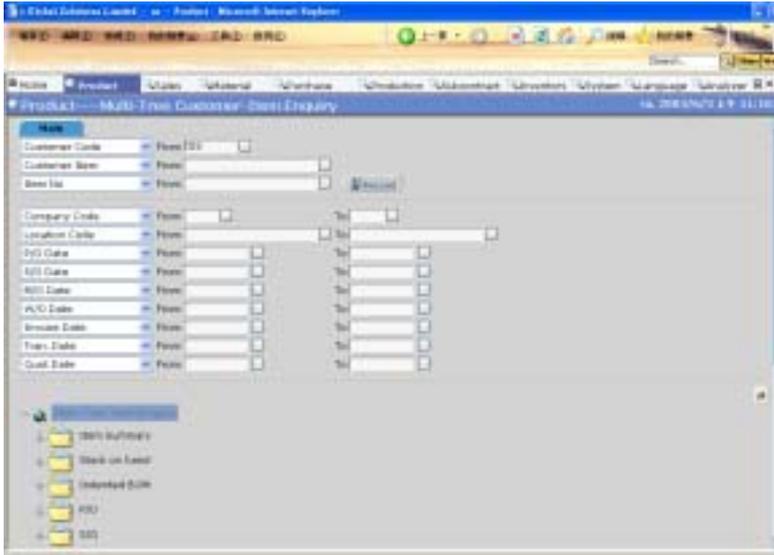


Steps:

- 1) In **Enquiry**, click **Multi-Tree Item Enquiry**.
- 2) Click the **Pop Up** button  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



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

Steps:

- 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*

Steps:

- 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



<b>Search</b>	Search & Filter results	<b>Preview</b>	Preview at screen
<b>Out XML</b>	Export as XML format	<b>Out RTF</b>	Export as RTF format
<b>Excel Analyse</b>	Export as excel format	<b>Next</b>	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**

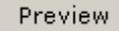
Steps:

- 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.

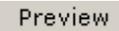
**e) BOM History List**

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**

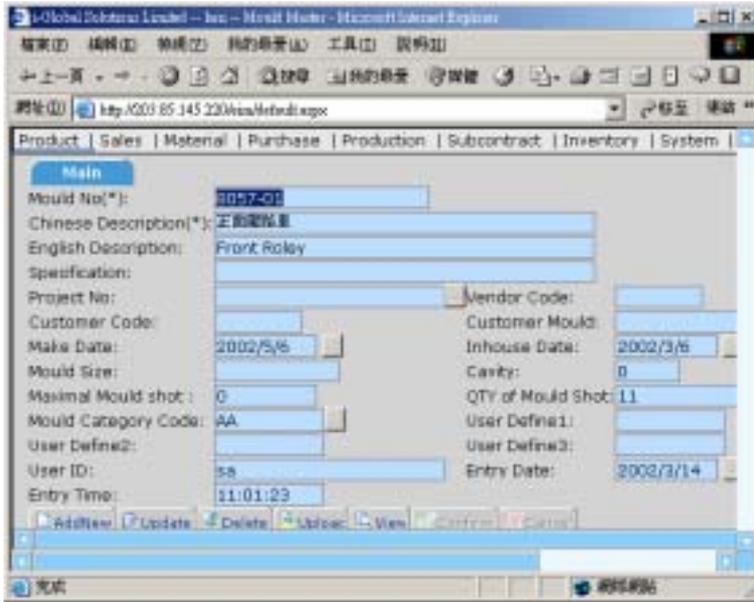
Steps:

- 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.*

- 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



#### *Create a new Mould No.*

Steps:

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

- 8) Click the **Pop Up** button  from the **Project No.** field → double click the **Project No.** you want to choose → press **Tab**.
- 9) Type **Cavity** → press **Tab**.
- 10) Type **Mould Size** → press **Tab**.
- 11) Type **QTY of Mould Shot** → click  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  button and then amend the data.
- 3) Click  button to confirm the input.

### ***Delete a Mould No.***

Steps:

- 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  button and then click **OK** button to delete the record.

## 10.2 Mould Injection Part

The screenshot shows a web browser window displaying a form titled "Mould Injection Part". The form includes the following fields and values:

- Mould No.: TJ-1801-01
- Chinese Description: 車身
- English Description: CAR BODY
- Specification: 車身
- Customer Mould: (empty)
- Inhouse Date: (empty)
- Project No.: (empty)
- Cavity: 0
- Mould Size: 535\*450\*500
- QTY of Mould Shot: 0
- Injection Part Description(\*): (empty)
- Gross Weight: 0.0000
- Net Weight: 0.0000
- Cavity: 0
- Remark: (empty)

At the bottom of the form, there are buttons for "Confirm" and "Cancel".

### *Create a new Mould No.*

Steps:

- 1) In **Tooling Plan**, click **Mould Injection Part**.
- 2) Click **AddNew** button → Select **Mould No.** → 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

### Create a Tool Plan

Steps:

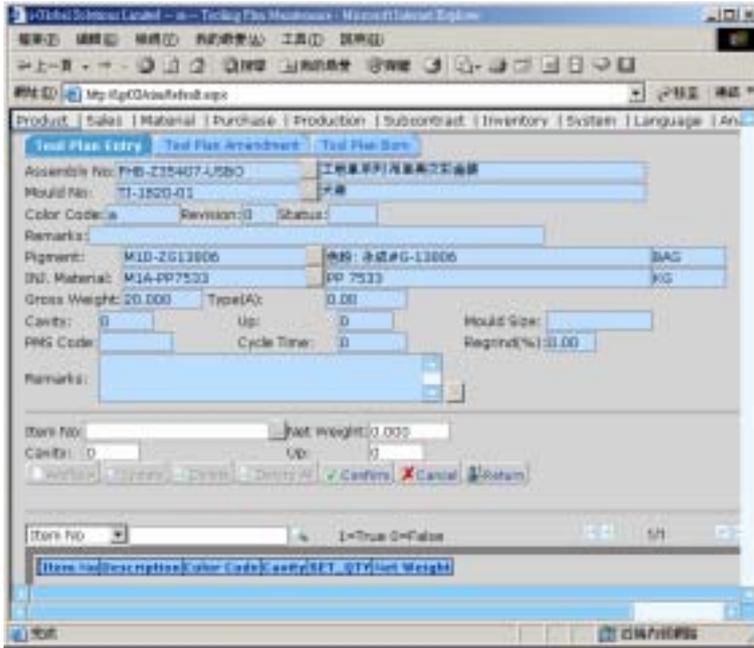
- 1) In **Tool Plan**, click **Tool Plan Maintenance**.
- 2) Click the **Pop Up** button  from the **Assembly No.** field → double click the **Assembly No.** you want to choose.
- 3) Click the **Pop Up** button  from the **Mould No.** field → double click the **Mould No.** you want to choose.
- 4) Type **Color Code**, **Revision**, **Status** and/or **Remarks** if required.

- 5) Click the **Pop Up** button  from the **Pigment** field → double click the **Item No.** you want to choose.
- 6) Click the **Pop Up** button  from the **INJ. Material** field → double click the **Item No.** you want to choose.
- 7) 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  from the **Item No.** field → double click the **Item No.** you want to choose.
- 10) Type **Net Weight, Cavity** and/or **Up** → press  button.

***Search an Item No.***

Refer to Chapter 1.5 – Search Engine.

## b) Tool Plan Amend Tab



### **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**

Steps:

- 1) In **Tooling Plan**, click **Tooling Plan Maintenance**.
- 2) Click **Tooling Plan Maintenance**.
- 3) Click the **Pop Up** button  from the **Assembly No.** field → double click the **Item No.** you want to choose.

- 4) Click the **Pop Up** button  from the **Mould No.** field → double click the **Mould No.** you want to choose.
- 5) Type **Color Code** → click **Read** button.

#### ***Update Master Information of Tool Plan***

Steps:

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

#### ***Delete Master Information of Tool Plan***

Steps:

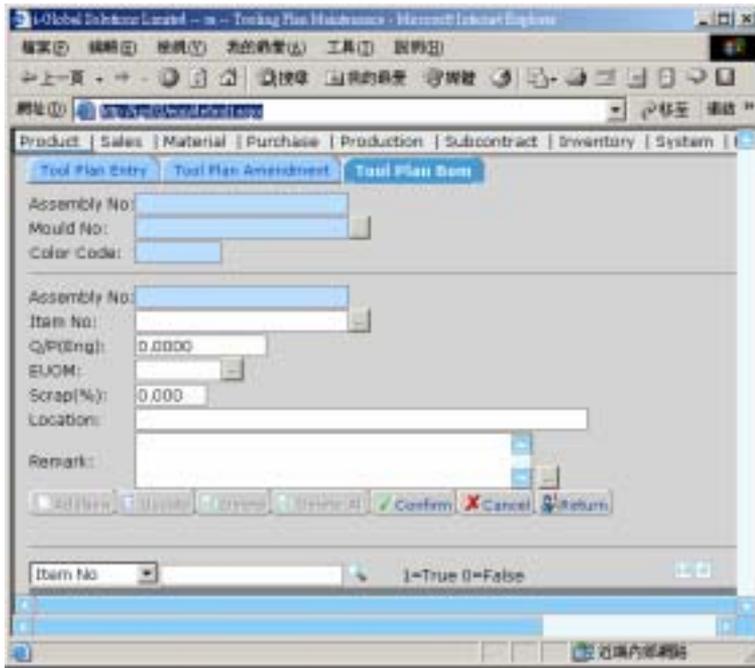
- 1) Click  button.
- 2) Click **Yes** to confirm the process.

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

Steps:

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

### c) Tool Plan BOM



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***

Steps:

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

- 4) Click the **Pop Up** button  from the **Mould No.** field → double click the **Mould No.** you want to choose.
- 5) Type **Color Code** → click **Read** button.

### ***Create a new Item No.***

Steps:

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

### ***Search an Item No.***

*Refer to Chapter 1.5 – Search Engine.*

***Update an Item No.*****Steps:**

- 1) 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:**

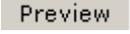
- 1) After you read the *Assembly No.*, click the **Pick** button on the left of the **Item No.** you want to delete → click the **Delete** button. (or use the search function to search an *Item No.* )
- 2) Click **Yes** to confirm the process.

***Delete All Item Numbers*****Steps:**

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

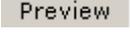
## 10.4 Mould List / Mould-Injection List

Steps:

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

## 10.5 Tooling Plan Report

Steps:

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