i -Global System

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:

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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”
## Icon Function

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

1.1 Introduction

The Product Data Management Module allows engineers to 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.

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

<table>
<thead>
<tr>
<th>Functions</th>
<th>Keys</th>
</tr>
</thead>
<tbody>
<tr>
<td>AddNew(A)</td>
<td>&lt;Alt-A&gt;</td>
</tr>
<tr>
<td>Update(U)</td>
<td>&lt;Alt-U&gt;</td>
</tr>
<tr>
<td>Delete(D)</td>
<td>&lt;Alt-D&gt;</td>
</tr>
<tr>
<td>Confirm(C)</td>
<td>&lt;Alt-C&gt;</td>
</tr>
<tr>
<td>Cancel(N)</td>
<td>&lt;Alt-N&gt;</td>
</tr>
</tbody>
</table>
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 \(\cdots\) from the Default Unit field \(\rightarrow\) 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 [Add New] button \( \rightarrow \) type Color Code \( \rightarrow \) press Tab.

3) Type Description \( \rightarrow \) 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.
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 the **AddNew** button.

3) Select **Product Class** and **Warehouse**.

4) Enter the **Account Codes**.

5) Click the **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 Add New 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

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.
3 Item

3.1 Item Master

a) Master File

Create a new Item in Master File

Steps:

1) In Item Code, click Item Master.

2) 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 from the UOM field → double click the UOM you want to choose.

5) Click the Pop Up button from the EUOM field → double click the EUOM you want to choose.

6) Click the Pop Up button from the Category Code field → double click the Category Code you want to choose.
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 Æ System Label Æ Item Master Æ 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 **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**

Steps:

1) 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

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 \(\rightarrow\) double click the Segment Series (Segment Group Name) you want to choose.

4) Click the Pop Up button 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

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 Add New 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 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 Item)

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.). \(\rightarrow\) 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 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 Confirm 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 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.*).  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**  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

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 **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.**

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 **Delete** button and then click **OK** button to delete the record.
10.2 Mould Injection Part

Create a new Mould No.

Steps:

1) In Tooling Plan, click Mould Injection Part.

2) Click Add New 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 **Confirm** button.

*Search an Item No.*

Refer to Chapter 1.5 – Search Engine.
b) Tool Plan Amend Tab

![Image of 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 **Confirm** 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 **Confirm** 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 \( \ldots \) from the **Mould No.** field \( \Rightarrow \) 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 **Add New** button.

2) Click the **Pop Up** button \( \ldots \) 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 \( \ldots \) from the **EUOM** field \( \Rightarrow \) 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:

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 Preview 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 Preview button to preview and/or print the report.