



sToolTracker - The tool management solution for Microsoft Dynamics 365 Business Central

User Manual
for Version 3



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I. Welcome to sToolTracker

A. sToolTracker Workflow

sToolTracker is a tool management solution for small and mid-sized organizations that helps you to manage your tools within Dynamics 365 Business Central.

sToolTracker is fast to implement, easy to configure and simplicity and customer centricity guides the development and usability.

Example: Role Center - sToolTracker Team

The screenshot shows the Dynamics 365 Business Central Role Center for the 'sToolTracker Team'. The top navigation bar includes 'ProductMaker' and 'sToolTracker Tools' with a dropdown arrow, followed by a menu icon and a refresh icon. Below the navigation is a horizontal menu bar with links: Tools, Tool Categories, Tool Attributes, Tool BOMs, Positive Adjustment, Negative Adjustment, Relocation, Use, Check-In, Maintenance, Quarantine, Reclassification, and a Print icon. The main content area features a heading 'Want to learn more about sToolTracker?' with a back button icon. Below this is a section titled 'Activities' with a 'Tools Activities' link. The central part of the screen displays six teal-colored boxes showing tool counts: 'TOOLS IN USE' (23), 'TOOLS IN MAINTENANCE' (4), 'TOOLS IN QUARANTINE' (1), 'AVAILABLE TOOLS' (1), 'NOT USED IN ... DAYS' (1), 'EXPIRED TOOLS' (1), and 'EXPIRING IN 30 DAYS' (1). At the bottom left is a 'Back to top' link.

The sToolTracker menu consists of following items:

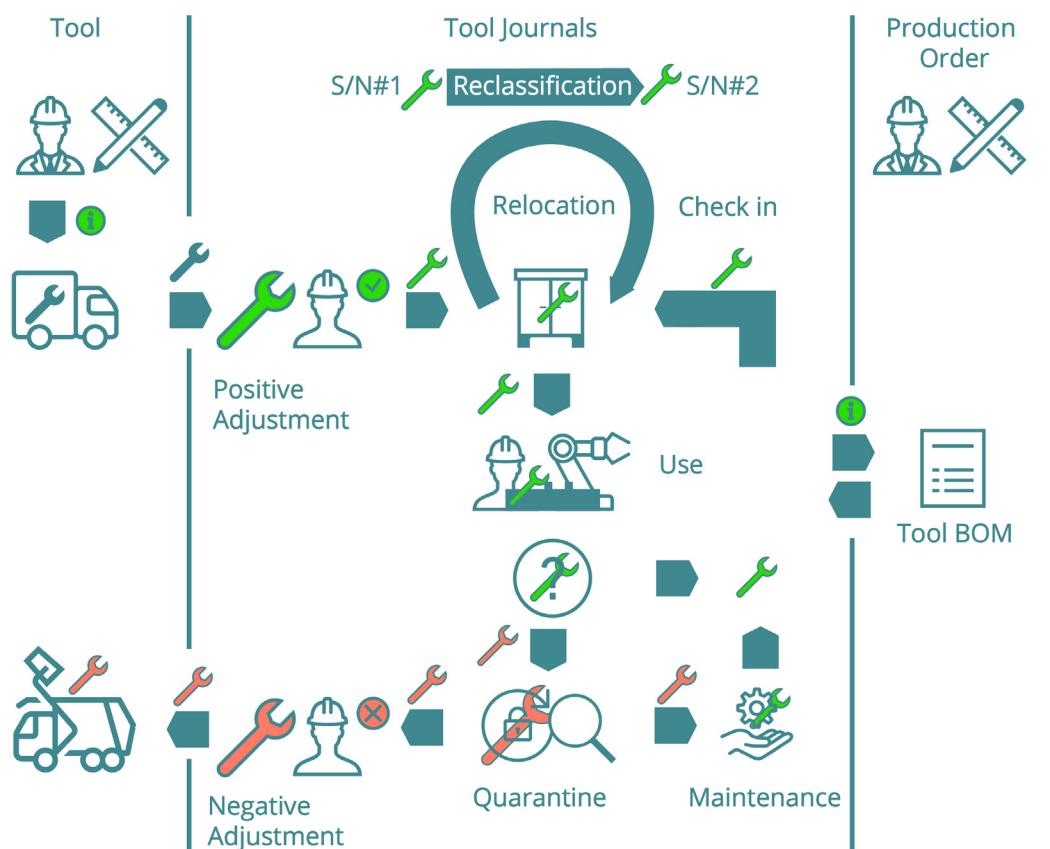
Menu item	Description
Tools	List of tools.
Tool Categories	List of tool categories
Tool Attributes	List of tool attributes
Tool BOMs	List of tool BOMs
Positive Adjustment	Tool journal - Entry type: Positive Adjustment
Negative Adjustment	Tool journal - Entry type: Negative Adjustment
Relocation	Tool journal - Entry type: Relocation
Use	Tool journal - Entry type: Use.
Check-In	Tool journal - Entry type: Check-In
Maintenance	Tool journal - Entry type: Maintenance.



sToolTracker

Menu item	Description
Quarantine	Tool journal - Entry type: Quarantine.
Reclassification	Tool journal - Entry type: Reclassification

The workflow of the menu items is illustrated in following logic card. It shows the connections and interdependencies of the sToolTracker functionalities:



sToolTracker Logic Card

 [Download Logic Card](#)

You can download this logic card from sToolTracker website: stooltracker.ibodigital.com.

In following table examples for each entry type are listed:

Tool Journal Entry Type	Description	Document No. (Examples)	Location Code Zone Code	New Location Code New Zone Code	Ledger Entry
Positive Adjustment	Add tools to the tool inventory	Purchase order, fixed asset no. etc..	Location where tool is stored	n/a	Positive Adjustment

Tool Journal Entry Type	Description	Document No. (Examples)	Location Code Zone Code	New Location Code New Zone Code	Ledger Entry
Relocation	Move tool to a different location	Warehouse receipt	Location from where tool is picked	Location where tool is relocated to	Relocation
Use	Move tool for usage	Production order, job order, service order	Location from where tool is picked	Location where tool is used	Use
Quarantine	Move tool to a blocked zone	Production order, job order, service order, claim report	Location from where tool is picked	Location where tool is quarantined	Quarantine
Maintenance	Move tool for maintenance	Purchase order, maintenance plan, calibration plan	Location from where tool is picked	Location where tool is maintained	Maintenance
Check-In	Move tool back to storage	Production order, job order, service order	Location from where tool is picked	Location where tool is stored	Check-In
Reclassification	Reclassify tool with new serial or lot number	Quality report, claim report	n/a	n/a	Reclassification
Negative Adjustment	Remove tools from the tool inventory	Disposal report, claim report	Location from where tool is picked	n/a	Negative Adjustment

B. Notes on the use of the user manual

This user manual consists of four main parts:

- Setup sToolTracker
- Work with tools
- Work with tool BOMs
- Manage multiple tools within sToolTracker

The setup part is addressed to administrators of Business Central. The work parts are addressed to the users of the system. Thereof the tool BOM section particularly addresses users familiar with production in Business Central. In the manage part, the experienced user learns how to organize and categorize multiple tools within sToolTracker.

In the respective parts always the most general approach is explained. More experienced users may choose navigation through the respective menu items.

! Note

You are a Microsoft Partner? Please contact us regarding installation and subscription.



II. Setup sToolTracker

This part addresses administrators of Business Central.

Simplify - 5 Min setup time

The setup should take you only 5 minutes If you need support, please contact us.

For your users to get started with sToolTracker, you will need to assign the appropriate permissions. sToolTracker comes bundled with two pre-configured permission sets.

Page: Permission Sets - sToolTracker

PERMISSION SETS			
Permission Set ↑	Name	Type ↑	Extension Name
→ STOOLTRACKER ADMIN	sToolTracker Administrator	Extension	sToolTracker
STOOLTRACKER TEAM	sToolTracker Team Member	Extension	sToolTracker

A. To create sToolTracker user groups:

1. Choose the icon, enter **User Groups**, and then choose the related link.
2. On the **User Groups** page, choose the **New** action.
3. Enter **STOOLTRACKER ADMIN** in the **Code** field, **sToolTracker Admin User Group** in the **Name** field and click on the **Default Profile** field to choose **IBOD STOOLTRACKER ADMIN**.
4. Enter **STOOLTRACKER TEAM** in the **Code** field, **sToolTracker Team User Group** in the **Name** field and click on the **Default Profile** field to choose **IBOD STOOLTRACKER USER**.

Note

The sToolTracker profiles are optional.



Example: User Groups sToolTracker

USER GROUPS

✓ SAVED

Code ↑	Name	Default Profile
→ STOOLTRACKER ADMIN	sToolTracker Admin User Group	IBOD STOOLTRACKER ADMIN
STOOLTRACKER TEAM	sToolTracker Team User Group	IBOD STOOLTRACKER USER

B. To assign sToolTracker user groups to users

1. Choose the icon, enter **Users**, and then choose the related link.
2. On the **Users** page, select the user to assign the sToolTracker permissions and choose the **Edit** action.
3. On the **User Card** page, on the **User Groups** FastTab, select a new line, choose the lookup button in the **Code** field and select the to assign sToolTracker permission (for users: **STOOLTRACKER TEAM**).
4. Choose the lookup button in the **Company Name** field and select the company for the selected user group.

Example: User Card - FastTab: User Groups

USER CARD

✓ SAVED

OPL

More options

User Groups

Code ↑	Name	Company Name ↑
D365 BUS FULL ACCESS	Business-Vollzugriff exkl. Benutzerverwaltung	CRONUS DE
→ STOOLTRACKER TEAM	sToolTracker Team User Group	CRONUS DE



! Note

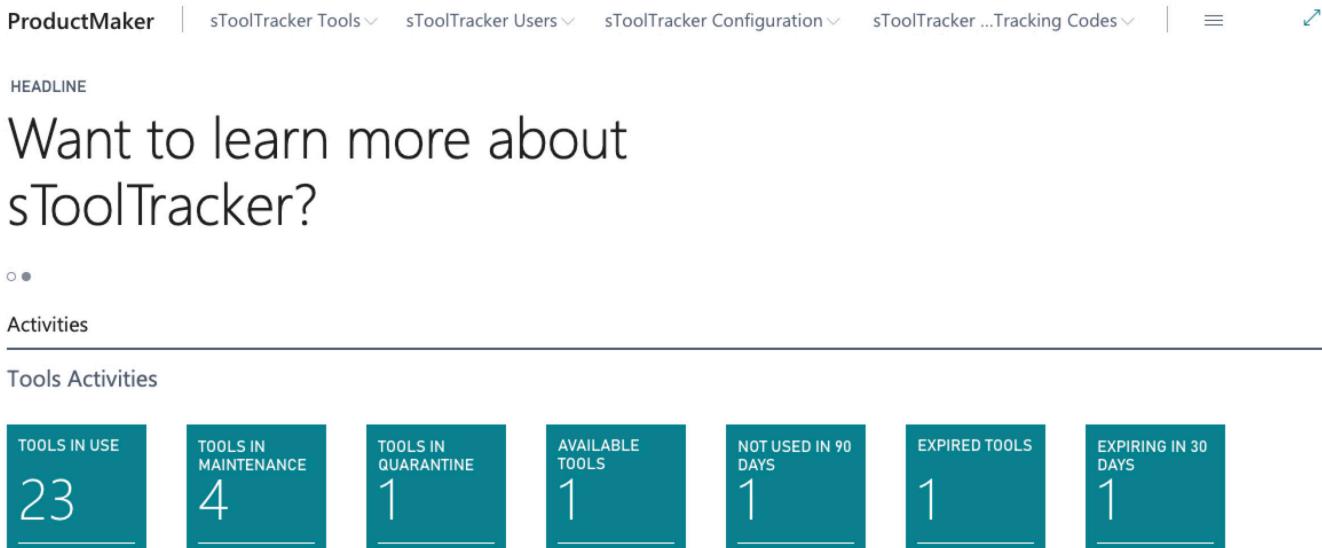
For more fine-grained control, you can duplicate and modify one of the existing sToolTracker permission sets or contact IBODigital support on stooltracker.ibodigital.com.

C. To use sToolTracker Administrator role center

Using sToolTracker Administrator role center gives you direct menu access to the following setup steps. The use is optional. All further setup steps can also be processed without use of this role center.

1. In the top right center, choose the Settings icon  , and then choose the **My Settings** action.
2. On the **My Settings** page, in the Role field, select the role **sToolTracker Administrator** as your role.
3. Choose the **OK** button.

Example: Role Center - sToolTracker Administrator



The screenshot shows the sToolTracker Administrator Role Center. At the top, there's a navigation bar with links for ProductMaker, sToolTracker Tools, sToolTracker Users, sToolTracker Configuration, sToolTracker ...Tracking Codes, and a search bar. Below the navigation is a headline section with a "HEADLINE" button. The main content area has a heading "Want to learn more about sToolTracker?". Below it, there are sections for "Activities" and "Tools Activities". Under "Tools Activities", there are six teal-colored boxes showing statistics: 23 tools in use, 4 tools in maintenance, 1 tool in quarantine, 1 available tool, 1 not used in 90 days, 1 expired tool, and 1 expiring in 30 days. Each box has a "View Details" link at the bottom.

TOOLS IN USE	TOOLS IN MAINTENANCE	TOOLS IN QUARANTINE	AVAILABLE TOOLS	NOT USED IN 90 DAYS	EXPIRED TOOLS	EXPIRING IN 30 DAYS
23	4	1	1	1	1	1

[Back to top](#)



D. To create a sToolTracker user

sToolTracker requires that each user be licensed. Users are managed via the **sToolTracker User Management** page.

1. Choose the icon, enter **sToolTracker User Management**, and then choose the related link.
2. On the **sToolTracker User Management** page, choose the **New** action.
3. On the selected empty line, choose the lookup button in the **Name** field and select the user who needs access to sToolTracker. The **Created Date** field is automatically filled after selection.

Note

You may see a default user SYSTEM. This is enabled at install time and can be removed.

Note

The user licenses are floating licenses. You can share the licences among the users over time.

Example: User Management for sToolTracker

A screenshot of the sToolTracker User Management interface. The top navigation bar includes links for Search, New, Edit List, Delete, Purchase Subscription, Manage Subscription, View Subscription, and a menu. Below the navigation is a table with two columns: Name and Created Date. The first row shows 'EMILY SMITH' and '21.06.2020'. The second row shows 'MATTHEW SMITH' and '21.06.2020'. A third row is partially visible with an arrow icon and a dropdown menu. The bottom of the interface has standard browser controls for back, forward, and search.

E. To create number series for sToolTracker

A well-designed numbering system is important for identification and makes sToolTracker more manageable as well as easier to use and analyze.

You create the numbering system by setting up codes by each type of master data of sTool-



Tracker. Following number series have to be defined on **No. Series** page for sToolTracker:

Code	Description	Default Nos.	Manual Nos.
TOOL	Unique identifier for the tool	✓	
TOOLBOM	Unique identifier for the tool BOM	✓	
TOOLBOMV	Number series for the tool BOM version	✓	
TOOLTCL	Number series for the tracking code: lot number	✓	✓
TOOLTCS	Number series for the tracking code: serial number	✓	✓

To create number series for sToolTracker works the same way as setting up **No. Series** in Business Central in general:

1. Choose the icon, enter **No. Series**, and then choose the related link.
2. Choose the **New** action.
3. On the new line, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
4. Choose the **Lines** action.
5. On the **No. Series Lines** page, fill in the fields to define the actual use and content of the number series that you created in step 2.
6. Repeat step 5 for as many different uses of the number series that you need. The **Starting Date** field defines which number series line is active.
7. Repeat step 2 to 6 for 5 times to set up all number series codes for sToolTracker.



Example: No. Series for sTooltracker

No. Series									✓ SAVED	≡	☰	✖	
Code ↑		Description		Starting No.	Ending No.	Last Date Used	Last No. Used	Defa... Nos.	Man... Nos.	Date Order			
→ TOOL	⋮ MyTools			T-N00001	–	04.06.2020	T-N000012	✓	□	□			
TOOLBOM		MyToolBOMs		T-B000001	–	28.05.2020	T-B000001	✓	□	□			
TOOLBOMV		MyToolBOMVersions		T-V000001	–	–	–	✓	□	□			
TOOLTCL		MyToolTrackingLotNo		T-L000001	–	27.05.2020	T-L000002	✓	✓	□			
TOOLTCS		MyToolTrackingSerialNo		T-S000001	–	27.05.2020	T-S000002	✓	✓	✓			

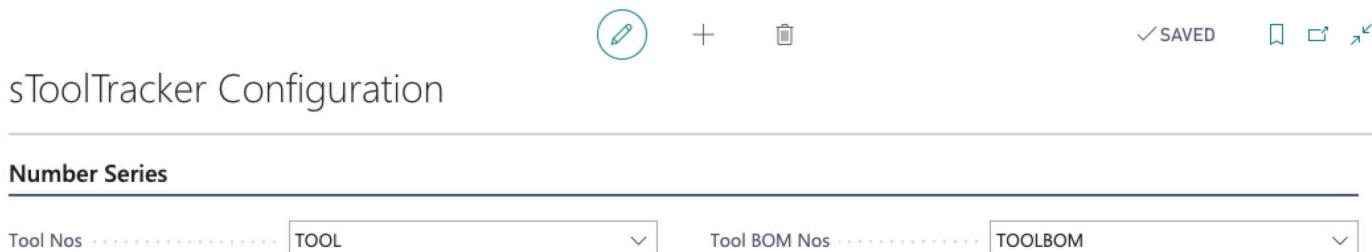
! Note

We recommend that you use the same number series codes as you see listed in the example above.

F. To map number series for tools and tool BOMs

1. Choose the  icon, enter **sToolTracker Configuration**, and then choose the related link.
2. In the **Tool Nos** field, choose the lookup button and select the respective number series code.
3. In the **Tool BOM Nos** field, choose the lookup button and select the respective number series code.

Example: sTooltracker Configuration



The screenshot shows the 'sToolTracker Configuration' page. At the top, there are navigation icons (edit, new, save, cancel) and a 'SAVED' status indicator. Below the title, there's a section titled 'Number Series' with two dropdown menus: 'Tool Nos' set to 'TOOL' and 'Tool BOM Nos' set to 'TOOLBOM'. The page has a clean, modern design with a light orange header bar.

G. To create a tool tracking code

1. Choose the  icon, enter **sToolTracker Tool Tracking Codes**, and then choose the related link.
2. On the **sToolTracker Tool Tracking Codes** page, choose **New** action.
3. On the **Tool Tracking Code Card** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
4. Repeat steps 2 to 3 for all needed tool tracking codes.



Example: sTooltracker Tool Tracking codes

STOOLTRACKER TOOL TRACKING CODES			
		✓ SAVED	
		Search	+ New
		Edit List	Delete
		Edit	Page
Code ↑			Description
→	LN	⋮	Lot number required
	LN+		Lot number and expiry date required
	SN		Serial number required
	SN+		Serial number and expiry date required
	SN-LN		Serial and lot number required
	SN-LN+		Serial and lot number and expiry date required
	XN		No tracking information required

Note

We recommend that you use the same tool tracking codes as you see listed in the example above.

Example: Tool Tracking Code Card - Lot number required

TOOL TRACKING CODE CARD

LN

General

Code Description

Serial No.

SN Specific Tracking

Lot No.

Lot Specific Tracking

Misc

Require Expiration Date Entry

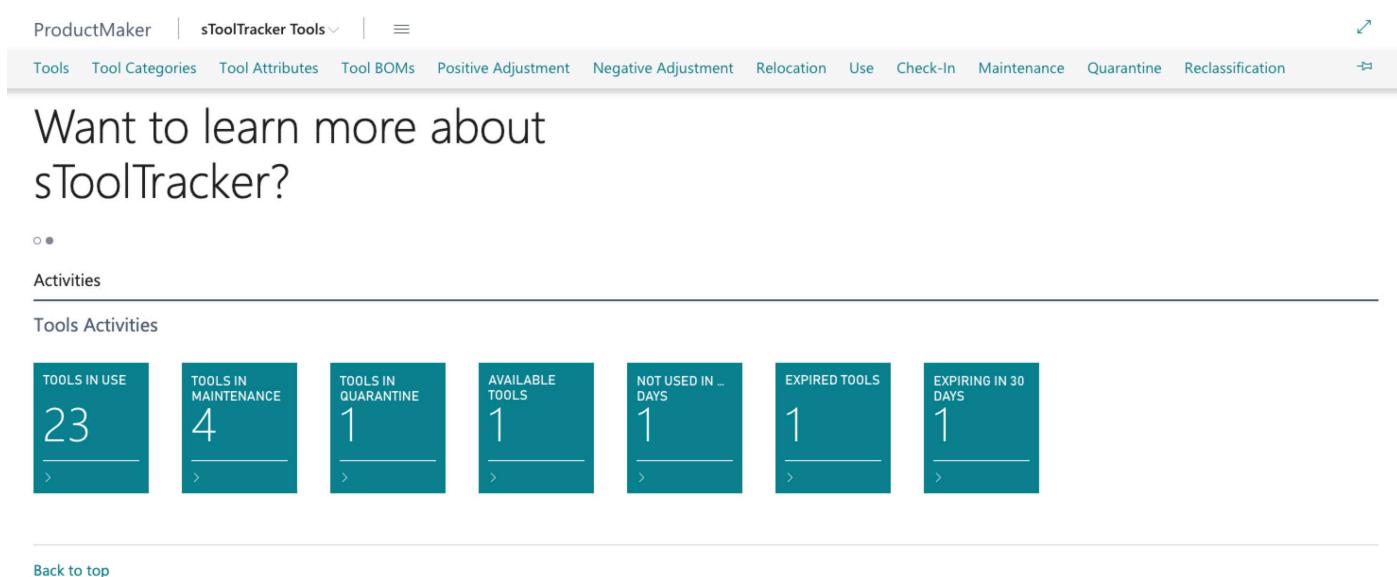


III. Work with Tools

A. To use the sToolTracker Team role center

1. In the top right center, choose the Settings icon , and then choose the **My Settings** action.
2. On the **My Settings** page, in the Role field, select the role **sToolTracker Expert** as your role.
3. Choose the **OK** button.

Example: Role Center - sToolTracker Team



The screenshot shows the sToolTracker Team role center interface. At the top, there is a navigation bar with links for ProductMaker, sToolTracker Tools (selected), Tools, Tool Categories, Tool Attributes, Tool BOMs, Positive Adjustment, Negative Adjustment, Relocation, Use, Check-In, Maintenance, Quarantine, Reclassification, and a search bar.

The main content area has a heading "Want to learn more about sToolTracker?". Below it, there are sections for "Activities" and "Tools Activities". The "Tools Activities" section contains seven cards with the following data:

TOOLS IN USE	TOOLS IN MAINTENANCE	TOOLS IN QUARANTINE	AVAILABLE TOOLS	NOT USED IN ... DAYS	EXPIRED TOOLS	EXPIRING IN 30 DAYS
23	4	1	1	1	1	1

At the bottom left, there is a "Back to top" link.

B. To create a new tool

1. Choose the  icon, enter **sToolTracker Tools**, and then choose the related link.
2. On the **sToolTracker Tools** page, choose the **New** action.
3. On the **Tool Card** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

! Note

On the **Tool Card** you can also add **Comments**, **Attachments** as well as a **Picture**.

Furthermore you can assign **Tool Attributes** („To assign tool attributes / tool attribute values to specific tools“ on page 45).

! Note

If you have posted a transaction for a tool, you cannot delete the card because the ledger entries may be needed for valuation or auditing.

Page: Tool Card

TOOL CARD

 + 
✓ SAVED  

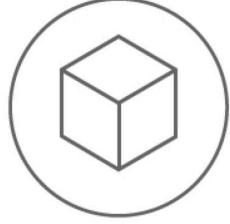
T-N000017

Process
Tool
History
Actions
Navigate
Fewer options


Tool

Tool No	T-N000017	...	Location Code	<input type="text"/>
Description	<input type="text"/> *		Zone Code	<input type="text"/>
Blocked	<input checked="" type="checkbox"/>		Fixed Asset No	<input type="text"/>
Tool Category Co...	<input type="text"/>			

Picture



Inventory

Inventory	<input type="text"/> 0	Net Weight	<input type="text"/> 0,00
Qty in Use	<input type="text"/> 0	Net Weight UOM	<input type="text"/>
Qty in Maintenance	<input type="text"/> 0	Unit of Measure	<input type="text"/>
Qty in Quarantine	<input type="text"/> 0		

Attachments

Attachments 0

Tool Tracking

Tool Tracking Co...	<input type="text"/>	Lot Nos	<input type="text"/>
Serial Nos	<input type="text"/>	Maintenance Cal...	<input type="text"/>

Attributes

Attribute	<input type="text"/>
Version	<input type="text"/> :
Measuring range	<input type="text"/>
Graduation	<input type="text"/>
Calibration	<input type="text"/>



Example: Create new tool

Following all steps above, our tool can look like this:



TOOL CARD



✓ SAVED



T-N000001

X Thank you for trying out sToolTracker. Your trial period expires in 29 days. Do you want to get a subscription? [Buy subscription...](#) | [Contact us](#)

Process Tool History Actions Navigate Fewer options

**Tool**

Tool No	T-N000001		...	Location Code	SITE1	
Description	Precision large dial indicate			Zone Code	INSPEC1	
Blocked	<input checked="" type="checkbox"/>			Fixed Asset No		
Tool Category Co...	DIAL_INDICATORS					

Inventory

Inventory	0	Net Weight	0,24
Qty in Use	0	Net Weight UOM	
Qty in Maintenance	0	Unit of Measure	PC
Qty in Quarantine	0		

Tool Tracking

Tool Tracking Co... .	SN-LN+	
Serial Nos	TOOLTCS	
Lot Nos	TOOLTCL	
Maintenance Cal...		

Picture **Attachments**

Attachments

1

Attributes

Attribute
Version
Measuring range
Graduation
Calibration

C. To add tools to the tool inventory (Positive Adjustment)

With the positive adjustment function you can add tools to the actual inventory (e.g. to add the receipt of purchased tools).

1. Choose the icon, enter **Tool Journals** and then choose the related link.
2. On the **Tool Journals** page, choose in the **Entry Type** field **Positive Adjmt.** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected Tool in the **Tool No.** field.
3. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.



4. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read a short description what the field specifies, hover over the respective field. For automated assignment of numbers based on specified number series on **Tool Card** page, choose **Assign Lot No.** action for lot number and choose **Assign Serial No.** action for serial number.
5. Repeat step 4 for all necessary tracking lines for the selected tool journals line.
6. When all necessary fields are filled in, close Edit - **Tool Tracking Lines** page.
7. Repeat steps 2 to 6 for all tools you want to register to the tool journals.
8. To post the tool journals lines, choose the **Post** action.

Page: Tool Journals - Entry Type: Positive Adjmt.

TOOL JOURNALS								
Manage	Post/Print	Line	Tool	More options				
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	Quantity	Unit of Measure Code
	Positive Adjmt.						0	

Example: Register tool with tracking code

TOOL JOURNALS								
Manage	Post/Print	Line	Tool	More options				
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	Quantity	Unit of Measure Code
25.06.2020	: Positive Adjmt.	PO123456	T-N000001	Precision large dial indicator	SITE1	INSPEC1	1	PC

EDIT - TOOL TRACKING LINES								
SOURCE			TOOL TRACKING			UNDEFINED		
Quantity			1			1		0
Tool Tracking Code	SN-LN+			Description	Serial and lot number and expiry date requir...			
Availability, Serial No.	Serial No.		Availability, Lot No.	Lot No.	Expiration Date		Quantity (Base)	
→ No	: SN2		█ No	LOT2	24.06.2022		1	

D. To relocate tools (Relocation)

1. Choose the  icon, enter **Tool Reclassification Journals**, and then choose the related link.
2. On the **Tool Reclassification Journals** page, choose in the **Entry Type** field **Transfer** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
4. In the **New Location Code** field and optional in the **New Zone Code**, look up the location and zone codes where the respective tool should be transferred.
5. In the **Quantity** field, enter how many units of the tool you want to transfer.
6. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
7. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
8. Choose  in the **Serial No.** and **Lot No.** field to select the respective serial and / or lot number from the tool ledger entries. The **Expiration Date** field is automatically filled with the data according to the selected tool ledger entry.
9. In the **New Serial No.** field, enter optional a new serial number to reclassify the tool's serial number after posting the journal line. If it is possible to reclassify a tool's serial number depends on the tracking code of the selected tool.
10. In the **New Lot No.** field, enter optional a new lot number to reclassify the tool's lot number after posting the journal line. If it is possible to reclassify a tool's lot number depends on the tracking code of the selected tool.
11. In the **New Expiration Date**, enter optional a new expiration date to reclassify the tool's expiration date after posting the journal line.
12. Repeat step 4 for all necessary tracking lines for the selected tool reclassification journal line.



13. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.

14. Repeat steps 2 to 6 for all tools you want to transfer.

15. To post the tool reclassification journal lines, choose the **Post** action.

Example: Transfer tool with tracking code

TOOL RECLASSIFICATION JOURNALS ✓ SAVED

Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity	Unit of Measure Code
23.06.2020	: Transfer	TO123456	T-N000005	HSK-A 63	SITE1	TSTORE1	SITE2		1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES

SOURCE		TOOL TRACKING		UNDEFINED	
Quantity		1		1	0
Tool Tracking Code	SN		Description	Serial number required	
Availability, Serial No.	Serial No.	New Serial No.	Availability, Lot No.	Lot No.	New Lot No.
→ No	: SN1		Yes		

E. To use tools

1. Choose the icon, enter **Tool Reclassification Journals**, and then choose the related link.
2. On the **Tool Reclassification Journals** page, choose in the **Entry Type** field **Use** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
 1. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
 2. In the **New Location Code** field and optional in the **New Zone Code**, look up the location and zone codes where the respective tool is gonna be used.
 3. In the **Quantity** field, enter how many units of the tool you need for operation.



3. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
4. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
1. Choose ... in the **Serial No.** and **Lot No.** field to select the respective serial and / or lot number from the tool ledger entries. The **Expiration Date** field is automatically filled with the data according to the selected tool ledger entry.
2. In the **New Serial No.** field, enter optional a new serial number to reclassify the tool's serial number after posting the journal line. If it is possible to reclassify a tool's serial number depends on the tracking code of the selected tool.
3. In the **New Lot No.** field, enter optional a new lot number to reclassify the tool's lot number after posting the journal line. If it is possible to reclassify a tool's lot number depends on the tracking code of the selected tool.
4. In the **New Expiration Date**, enter optional a new expiration date to reclassify the tool's expiration date after posting the journal line.
5. Repeat step 4 for all necessary tracking lines for the selected tool reclassification journal line.
6. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
7. Repeat steps 2 to 6 for all tools you want to use.
8. To post the tool reclassification journal lines, choose the **Post** action.



Example: Use tool with tracking code

TOOL RECLASSIFICATION JOURNALS											✓ SAVED					
Manage				Post/Print			Line		Tool		More options					
Posting Date	Entry Type	Document No.	Tool No.	Description		Location Code		Zone Code	New Location Code	New Zone Code	Quantity	Unit of Measure Code				
23.06.2020	:	Use	PO123456	T-N000005	HSK-A 63	SITE1	TSTORE1	PROD1			1	PC				



Manage | Actions | Fewer options

EDIT - TOOL TRACKING LINES



SOURCE	TOOL TRACKING	UNDEFINED
Quantity	1	1
Tool Tracking Code	SN	Description Serial number required
Availability, Serial No.	Serial No.	New Serial No.
→ No	: SN1	Yes
Lot No.	New Lot No.	Expiration Date
		New Expiration Date
		Quantity (Base)
		1

F. To quarantine tools

1. Choose the icon, enter **Tool Reclassification Journals**, and then choose the related link.
2. On the **Tool Reclassification Journals** page, choose in the **Entry Type** field **Quarantine** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
 1. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
 2. In the **New Location Code** field and optional in the **New Zone Code**, look up the location and zone codes where the respective tool is gonna be used.
 3. In the **Quantity** field, enter how many units of the tool you need to quarantine.
 3. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
 4. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
 1. Choose in the **Serial No.** and **Lot No.** field to select the respective serial and / or lot number from the tool ledger entries. The **Expiration Date** field is automatically filled with the data according to the selected tool ledger entry.
 2. In the **New Serial No.** field, enter optional a new serial number to reclassify the tool's serial number after posting the journal line. If it is possible to reclassify a tool's serial number depends on the tracking code of the selected tool.



3. In the **New Lot No.** field, enter optional a new lot number to reclassify the tool's lot number after posting the journal line. If it is possible to reclassify a tool's lot number depends on the tracking code of the selected tool.
4. In the **New Expiration Date**, enter optional a new expiration date to reclassify the tool's expiration date after posting the journal line.
5. Repeat step 4 for all necessary tracking lines for the selected tool reclassification journal line.
6. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
7. Repeat steps 2 to 6 for all tools you want to quarantine.
8. To post the tool reclassification journal lines, choose the **Post** action.

Example: Quarantine tool with tracking code

TOOL RECLASSIFICATION JOURNALS

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Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity	Unit of Measure Code
23.06.2020	: Quarantine	QR123456	T-N000005	HSK-A 63	SITE1	TSTORE1	RED		1	PC

Manage | Actions | Fewer options

EDIT - TOOL TRACKING LINES

SOURCE		TOOL TRACKING		UNDEFINED	
Quantity	1	Description	1	Serial number required	0
Tool Tracking Code	SN				
Availability, Serial No.	Serial No.	New Serial No.	Availability, Lot No.	Lot No.	New Lot No.
→ No	: SN1	Yes			

G. To maintain tools

1. Choose the icon, enter **Tool Reclassification Journals**, and then choose the related link.
2. On the **Tool Reclassification Journals** page, choose in the **Entry Type** field **Mainten-**



ce and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

3. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
4. In the **New Location Code** field and optional in the **New Zone Code**, look up the location and zone codes where the respective tool is gonna be used.
5. In the **Quantity** field, enter how many units of the tool you need to maintain.
6. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
7. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
8. Choose **...** in the **Serial No.** and **Lot No.** field to select the respective serial and / or lot number from the tool ledger entries. The **Expiration Date** field is automatically filled with the data according to the selected tool ledger entry.
9. In the **New Serial No.** field, enter optional a new serial number to reclassify the tool's serial number after posting the journal line. If it is possible to reclassify a tool's serial number depends on the tracking code of the selected tool.
10. In the **New Lot No.** field, enter optional a new lot number to reclassify the tool's lot number after posting the journal line. If it is possible to reclassify a tool's lot number depends on the tracking code of the selected tool.
11. In the **New Expiration Date**, enter optional a new expiration date to reclassify the tool's expiration date after posting the journal line.
12. Repeat step 4 for all necessary tracking lines for the selected tool reclassification journal line.
13. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
14. Repeat steps 2 to 6 for all tools you want to maintain.
15. To post the tool reclassification journal lines, choose the **Post** action.

Example: Maintain tool with tracking code



TOOL RECLASSIFICATION JOURNALS

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Manage Post/Print Line Tool More options



Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity	Unit of Measure Code
23.06.2020	Maintenance	MO123456	T-N000005	HSK-A 63	SITE1	TSTORE1	INSPECTION		1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES



SOURCE		TOOL TRACKING		UNDEFINED	
Quantity		1		1	0
Tool Tracking Code	SN		Description		Serial number required
Availability, Serial No.	Serial No.	New Serial No.	Availability, Lot No.	Lot No.	New Lot No.
→ No	⋮ SN1		Yes		
					Quantity (Base)
					1

H. To check in tools

1. Choose the icon, enter **Tool Reclassification Journals**, and then choose the related link.
2. On the **Tool Reclassification Journals** page, choose in the **Entry Type** field **Check-In** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
4. In the **New Location Code** field and optional in the **New Zone Code**, look up the location and zone codes where the respective tool is gonna be used.
5. In the **Quantity** field, enter how many units of the tool you want to check in.
6. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
7. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
8. Choose in the **Serial No.** and **Lot No.** field to select the respective serial and / or lot



number from the tool ledger entries. The **Expiration Date** field is automatically filled with the data according to the selected tool ledger entry.

9. In the **New Serial No.** field, enter optional a new serial number to reclassify the tool's serial number after posting the journal line. If it is possible to reclassify a tool's serial number depends on the tracking code of the selected tool.
10. In the **New Lot No.** field, enter optional a new lot number to reclassify the tool's lot number after posting the journal line. If it is possible to reclassify a tool's lot number depends on the tracking code of the selected tool.
11. In the **New Expiration Date**, enter optional a new expiration date to reclassify the tool's expiration date after posting the journal line.
12. Repeat step 4 for all necessary tracking lines for the selected tool reclassification journal line.
13. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
14. Repeat steps 2 to 6 for all tools you want to check in.
15. To post the tool reclassification journal lines, choose the **Post** action.

Example: Check in tool with tracking code

TOOL RECLASSIFICATION JOURNALS

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Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity	Unit of Measure Code
23.06.2020	: Check-In	PO123456	T-N000005	HSK-A 63	PROD1		SITE1	TSTORE1	1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES

SOURCE		TOOL TRACKING		UNDEFINED				
Quantity	1	Description	1	Serial number required	0			
Tool Tracking Code	SN							
Availability, Serial No.	Serial No.	New Serial No.	Availability, Lot No.	Lot No.	New Lot No.			
→ No	: SN1		Yes			Expiration Date	New Expiration Date	Quantity (Base)
								1

- I. To reclassify tools (Reclassification)
- J. To remove tools (Negative Adjustment)

With the negative adjustment function you can unregister tools from the actual inventory (e.g. the disposal of worn tools).

1. Choose the  icon, enter **Tool Journals** and then choose the related link.
2. On the **Tool Journals** page, choose in the **Entry Type** field **Negative Adjmt.** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field. **Location Code** and **Zone Code** fields are prefilled with the default location and zone codes specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
3. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
4. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read a short description what the field specifies, hover over the respective field. Choose  to select the respective serial and / or lot number from the tool ledger entries.
5. Repeat step 4 for all necessary tracking lines for the selected tool journals line.
6. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
7. Repeat steps 2 to 6 for all tools you want to unregister from the tool journals.
8. To post the tool journals lines, choose the **Post** action.

Page: Tool Journals - Entry Type: Negative Adjmt.

TOOL JOURNALS

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Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	Quantity	Unit of Measure Code
	: Negative Adj...						0	

 Example: Unregister tool with tracking code



TOOL JOURNALS

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Manage Post/Print Line Tool More options



Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	Quantity	Unit of Measure Code
23.06.2020	Negative Ad...	DO123456	T-N000005	HSK-A 63	SITE1	TSTORE1	2	PC

EDIT - TOOL TRACKING LINES



SOURCE		TOOL TRACKING		UNDEFINED	
Quantity	2		2		0
Tool Tracking Code	SN	Description		Serial number required	
Availability, Serial No.	Serial No.	Availability, Lot No.	Lot No.	Expiration Date	Quantity (Base)
Yes	SN1	Yes			1
→ Yes	SN2	Yes			1

K. To track tool ledger entries

- Choose the icon, enter **sToolTracker Tools**, and then choose the related link.
- On the **sToolTracker Tools** page, select tool you want to track and choose the **Edit** action.
- On the **Tool Card** page, choose the **Tool Ledger Entries** action.

Example: Tool Ledger Entries

STOOLTRACKER TOOL LEDGER ENTRIES

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Search Page



Posting Date	User	Entry Type	Serial No.	Lot No.	Expiry Date	Document No.	Tool No.	Description	Location Code
22.06.2020		Positive Adj...	SN1			PO123456	T-N000005	HSK-A 63	SITE1
22.06.2020		Positive Adj...	SN2			PO123456	T-N000005	HSK-A 63	SITE1
22.06.2020		Negative A...	SN1			DO123456	T-N000005	HSK-A 63	SITE1
22.06.2020		Negative A...	SN2			DO123456	T-N000005	HSK-A 63	SITE1



IV. Work with Tool BOMs

A. To create a tool BOM

1. Choose the  icon, enter **sToolTracker Tool BOMs**, and then choose the related link.
2. On the **sToolTracker Tool BOMs page**, choose the **New** action.
3. On the **Tool BOM** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
4. To edit the tool BOM, set the **Status** field to **New** or **Under Development**. To activate it, set the **Status** field to **Certified**.
5. Proceed to fill in the tool BOM **Lines**.
 1. In the **Tool No.** field, look up and select the tool in question, or type it in the field.
 2. In the **Tool Set** field, type in if necessary a text to show the user that specific tools on the tool BOM can only be used together as a set. The text is free editable. For example: Set1, Set2 etc..
 3. In the **Use Location Code** field, look up and select the location where the tool gonna be used.
 4. In the **Use Zone Code** field, look up and select the zone where the tool gonna be used.
 5. In the **Quantity per** field, enter how many units of the tool are required for the specific operation.
 6. Certify the tool BOM.
 7. You can now attach the new tool BOM to the routing operation in question.

Page: Tool BOM



Tool BOM

No	<input type="text"/>	Version Nos.	<input type="text"/>
Description	<input type="text"/>	Active Version	<input type="text"/>
Status	<input type="text"/>	Last Modified Date	<input type="text"/>
Search Name	<input type="text"/>		

Lines	Manage					
Tool No	Description	Tool Set	Use Location Code	Use Zone Code	Quantity Per	Unit of Measure Code
→					0	

Example: Create new tool BOM

In following example the tool T-N000005 is used during operations in three different sets: T-N000005/1, T-N0000005/2 and T-N000005/3:



TOOL BOM



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Operation 1 - XXXXX.XX

No	T-B000001
Description	Operation 1 - XXXXX.XX
Status	New
Search Name	Operation 1

Version Nos.	TOOLBOMV
Active Version	
Last Modified Date	14.06.2020

Lines | Manage



Tool No		Description	Tool Set	Use Location Code	Use Zone Code	Quantity Per	Unit of Measure Code
→ T-N000002	:	HSK-A 100	T-N000002	SITE1	PROD1	1	
T-N000006		QuickTurn clamping toolholder...	T-N000002	SITE1	PROD1	1	
T-N000003		CNMG 120416 HB7035-1	T-N000002	SITE1	PROD1	1	
T-N000005		HSK-A 63	T-N000005/1/2/3	SITE1	PROD1	1	
T-N000007		ER clamping nut CP Standard 25	T-N000005/1	SITE1	PROD1	1	
T-N000004		Solid carbide jobber drill extra ...	T-N000005/1	SITE1	PROD1	1	
T-N000009		Quick-change tapping chuck M...	T-N000005/2	SITE1	PROD1	1	
T-N000008		Machine tap HSS-E-PM Form B...	T-N000005/2	SITE1	PROD1	1	
T-N000011		HP collet 10 mm	T-N000005/3	SITE1	PROD1	1	
T-N000010		Solid carbide deburrer 90° 10 ...	T-N000005/3	SITE1	PROD1	1	

B. To map tool BOM to routing operation

1. Choose the icon, enter **Routings**, and then choose the related link.
2. On the **Routings** page, select the routing you want to modify and choose the Edit action.
3. On the **Routing** page, on the Lines FastTab, select the operation you want to modify and select the **Tool BOMs** action.
4. On **Edit - Routing Tool BOM Mapping** page, choose the lookup on **Tool BOM** field to select the tool BOM you want to map and then close the page.
5. Repeat step 3 to 4 for all operations you want to modify.



Example: Map tool BOM to routing operation



A screenshot of a software application window titled "Manage". Inside, a sub-titled section says "EDIT - ROUTING TOOL BOM MAPPING - 1000 · 10". Below this, there is a dropdown menu labeled "Tool BOM" which has "T-B000001" selected. In the bottom right corner of the main window area, there is a "Close" button.

C. To modify tool BOM in production orders

1. Depending of the production order status, choose the icon, enter **Simulated Production Orders**, **Planned Production Orders**, **Firm Planned Prod. Orders** or **Released Production Orders**, and then choose the related link.
2. On the **Simulated Productions Orders**, **Planned Production Orders**, **Firm Planned Prod. Orders** or **Released Production Orders** page, select the production order you want to modify and choose the **Edit** action.
3. On the **Simulated Production Order**, **Planned Production Order**, **Firm Planned Prod. Order** or **Released Production Order** page, on the **Lines** FastTab, select the item you want to modify and choose the **Routing** action.
4. On the **Edit - Prod. Order Routing page**, select the operation you want to modify and choose the **Refresh Tool BOMs** action. With this action the tool BOM for this operation is copied from the previous status of that production order or if no previous status of that production order exists from the mapped tool BOM in the routing.
5. On the **Edit - Prod. Order Routing page**, select again the operation you want to modify and choose the **Tool BOMs** function.
6. On the **Edit - Production Order Tool BOM** page, modify and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
7. Close **Edit - Production Order Tool BOM** page to save the changes.
8. Repeat steps 4 to 7 for all operations as necessary.

Example: Modify tool BOM during production planning



Search + New Edit List Delete Comments Page

EDIT - PRODUCTION ORDER TOOL BOM

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Tool No.	Description	Tool Set	Use Location Code	Use Zone Code	Quantity per	Unit of Measure Code
T-N000002	HSK-A 100	T-N000002	SITE1	PROD1	1	PC
T-N000006	QuickTurn clamping toolholder 20/12 ...	T-N000002	SITE1	PROD1	1	PC
T-N000003	CNMG 120416 HB7035-1	T-N000002	SITE1	PROD1	1	PC
T-N000005	HSK-A 63	T-N000005/1/2/3	SITE1	PROD1	1	PC
T-N000007	ER clamping nut CP Standard 25	T-N000005/1	SITE1	PROD1	1	PC
T-N000004	Solid carbide jobber drill extra stub 6...	T-N000005/1	SITE1	PROD1	1	PC
T-N000009	Quick-change tapping chuck M3-12	T-N000005/2	SITE1	PROD1	1	PC
T-N000008	Machine tap HSS-E-PM Form B 6G M8	T-N000005/2	SITE1	PROD1	1	PC
T-N000011	HP collet 10 mm	T-N000005/3	SITE1	PROD1	1	PC
T-N000010	Solid carbide deburrer 90° 10 mm	T-N000005/3	SITE1	PROD1	1	PC
→					0	

Close

D. To use tools for operation

1. Choose the icon, enter **Released Production Orders**, and then choose the related link.
2. On the **Released Production Orders** page, select the production order you are working on and choose the **Edit** action.
3. On **Released Production Order** page, on the **Lines** FastTab, select the item you are working on and select the **Production Journal** action.
4. On the **Edit - Production Journal** page, select the operation you are working on and choose the **Use** action.
5. On the **Edit - Tool Reclassification Journals** page, modify and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
6. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
7. On the **Edit - Tool Tracking Lines** page fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective field.
8. Repeat step 7 for all necessary tracking lines for the selected tool reclassification journal line.
9. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.



10. Repeat steps 6 to 9 for all tools you want to use.

11. To post the tool reclassification journal lines, choose the **Post** action.

Example: Use tools in production

EDIT - TOOL RECLASSIFICATION JOURNALS									
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity
25.06.2020	Use	PO123456/...	T-N000002	HSK-A 100	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000006	QuickTurn clamping toolholder...	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000003	CNMG 120416 HB7035-1	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000005	HSK-A 63	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000007	ER clamping nut CP Standard 25	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000004	Solid carbide jobber drill extra ...	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000009	Quick-change tapping chuck M...	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000008	Machine tap HSS-E-PM Form B...	SITE1	PROD1	SITE1	TSTORE1	1
25.06.2020	Use	PO123456/...	T-N000011	HP collet 10 mm	SITE1	PROD1	SITE1	TSTORE1	1
→ 25.06.2020	: Use	PO123456/...	T-N000010	Solid carbide deburrer 90° 10 ...	SITE1	PROD1	SITE1	TSTORE1	1

E. To check in tools after finished operation

1. Choose the icon, enter **Released Production Orders**, and then choose the related link.
2. On the **Released Production Orders** page, select the production order you are working on and choose the **Edit** action.
3. On **Released Production Order** page, on the **Lines** FastTab, select the item you are working on and select the **Production Journal** action.
4. On the **Edit - Production Journal** page, select the operation you are working on and choose the **Check In** action.
5. On the **Edit - Tool Reclassification Journals** page, modify and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
6. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
7. On the **Edit - Tool Tracking Lines** page modify and fill in fields as necessary for the tool tracking code. To read short description what the field specifies, hover over the respective



field.

8. Repeat step 7 for all necessary tracking lines for the selected tool reclassification journal line.
9. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
10. Repeat steps 6 to 9 for all tools you want to check in.
11. To post the tool reclassification journal lines, choose the **Post** action.

Example: Checkin tools in production

Manage Post/Print Line Tool | More options

EDIT - TOOL RECLASSIFICATION JOURNALS

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	New Location Code	New Zone Code	Quantity	L N
→ 25.06.2020	: Check-In	PO123456/...	T-N000002	HSK-A 100	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000006	QuickTurn clamping toolholder...	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000003	CNMG 120416 HB7035-1	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000005	HSK-A 63	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000007	ER clamping nut CP Standard 25	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000004	Solid carbide jobber drill extra ...	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000009	Quick-change tapping chuck M...	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000008	Machine tap HSS-E-PM Form B...	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000011	HP collet 10 mm	SITE1	PROD1	SITE1	TSTORE1	1	
25.06.2020	Check-In	PO123456/...	T-N000010	Solid carbide deburrer 90° 10 ...	SITE1	PROD1	SITE1	TSTORE1	1	

V. Manage multiple tools

To maintain an overview of your tools and to help you sort and find tools, it is practical to organize your tools in tool categories and to characterize them by tool attributes.

A. To create a tool category

1. Choose the  icon, enter **sToolTracker Tool Categories**, and then choose the related link.
2. On the **sToolTracker Tool Categories** page, choose **New** action.
3. On the **Tool Category Card** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

Note

If the tool category has a parent tool category, as indicated by the **Parent Category** field, then any tool attributes that are assigned to that parent tool category are prefilled on the **Attributes** FastTab.

Note

Tool attributes that you assign to a tool category will automatically apply to the tool that the tool category is assigned to.



Page: Tool Category Card

Tool Category Card

Translations

General

Code	<input type="text"/>	Parent Category	<input type="button" value="▼"/>
Description	<input type="text"/>		
Attributes		Manage	<input type="button" value=""/>
Attribute	Default Value	Inherited From ↓	Unit of Measure Code
→			

Example: Create tool category

We create the tool categories: Measurement and Dial_Inspector. Measurement is the parent category of Dial_Inspector.

To assign tool attributes to a tool category, see „To assign tool attributes to tool categories“ on page 43.

STOOLTRACKER TOOL CATEGORIES					
Search		New	Edit List	Delete	Edit
Code	Description	Indentation	Parent Category		
→ MEASUREMENT	Measurement technology	0			
ANCIL_MEASU	Measurement ancillaries	1	MEASUREMENT		
CALIPER	Caliper	1	MEASUREMENT		
DIAL_INDICATORS	Dial Indicators	1	MEASUREMENT		
GAUGES	Gauges	1	MEASUREMENT		
INDICATORS	Indicators	1	MEASUREMENT		

B. To create translation for tool category

1. Choose the icon, enter **sToolTracker Tool Categories**, and then choose the related link.
2. On the **sToolTracker Tool Categories** page, select a tool category of that you want to



create translations for. Then choose the **Edit** action.

3. On the **Tool Category Card** page choose the **Translations** action.
4. On the **Tool Category Translations** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

Note

The **Tool Category Translations** are particularly useful, if you want to include tool categories later in reports.

Page: Tool Category Translations

TOOL CATEGORY TRANSLATIONS			
Search New Edit List Delete Page			
Language ↑		Description	
→			

Example: Create tool category translations

We create two translations for the tool category *Dial Indicators*. In our example German and English:

TOOL CATEGORY TRANSLATIONS			
Search New Edit List Delete Page			
Language Code ↑		Name	
	DEU	Messbereich	
	ENU	Measuring range	
→			

C. To assign a tool category to a tool

1. Choose the icon, enter **sToolTracker Tools**, and then choose the related link.
2. Open the card for the tool that you want to assign to a tool category.

3. Choose the lookup button in the **Tool Category Code** field and select an existing tool category. Alternatively choose the **New** action to first create a new tool category as explained in „To create a tool category“ on page 36.

Example: Assign tool category to tool

We assign the previously created tool category Dial_Indicators to a new tool and fill in as description: Precision large dial indicator:

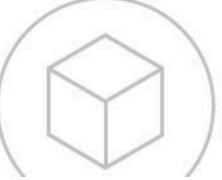
TOOL CARD

()
()
()
✓ SAVED



T-N000014

Process Tool History Actions Navigate Fewer options

Tool		Picture	
Tool No	T-N000014	Location Code	<input type="button" value="▼"/>
Description	Precision large dial indicate	Zone Code	<input type="button" value="▼"/>
Blocked	<input checked="" type="checkbox"/>	Fixed Asset No	<input type="button" value="▼"/>
Tool Category Co...	DIAL_INDICATORS		

D. To create tool attributes

1. Choose the  icon, enter **sToolTracker Tool Attributes**, and then choose the related link.
2. On the **sToolTracker Tool Attributes** page, choose **New** action.
3. On the **Tool Attribute** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

Page: Tool Attribute

Tool Attribute

Translations Tool Attribute Values More options

Name	<input type="text"/>	Type	Option
Unit of Measure	<input type="button" value="▼"/>	Blocked	<input checked="" type="checkbox"/>

! Note

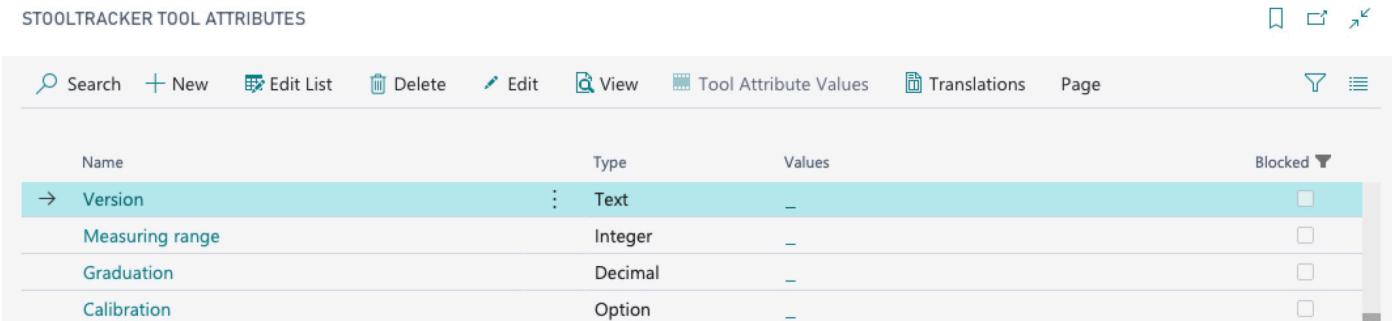
If you select **Option** in the **Type** field, then you can choose the Tool Attribute Values action to create values for the tool attribute. For more information, please see [To create values for tool attributes of type Option](#).

Example: Create tool attributes

We create four attributes (version, measuring range, graduation, calibration) which we want later assign to our tool category *Dial_Indicators* according to following specification:

Name	Type	Unit of Measure
Version	Text	-
Measuring range	Integer	MM (milimeter)
Graduation	Decimal	MM (milimeter)
Calibration	Option	-

STOOLTRACKER TOOL ATTRIBUTES



Name	Type	Values	Blocked
→ Version	Text	-	<input type="checkbox"/>
Measuring range	Integer	-	<input type="checkbox"/>
Graduation	Decimal	-	<input type="checkbox"/>
Calibration	Option	-	<input type="checkbox"/>

E. To create translation for tool attribute

1. Choose the  icon, enter **sToolTracker Tool Attributes**, and then choose the related link.
2. On the **sToolTracker Tool Attributes** page, select a tool attribute of that you want to create translations for. Then choose the **Translations** action.
3. On the **Tool Attribute Translations** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

! Note

The **Tool Attribute Translations** are particularly useful, if you want to include tool attributes later in reports.



Page: Tool Attribute Translations

TOOL ATTRIBUTE TRANSLATIONS



Search New Edit List Delete Page



Language Code ↑	Name
→	

Example: Create tool attribute translations

We create per set up tool attribute two translations. In our example German and English:

TOOL ATTRIBUTE TRANSLATIONS



Search New Edit List Delete Page



Language Code ↑	Name
DEU	Messbereich
ENU	Measuring range
→	

F. To create values for tool attributes of type Option

1. Choose the icon, enter **sToolTracker Tool Attributes**, and then choose the related link.
2. On the **sToolTracker Tool Attributes** page, select a tool attribute of Type **Option** that you want to create values for. Then choose the **Tool Attribute Values** action.
3. On the **Tool Attribute Values** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

Page: Tool Attribute Values



TOOL ATTRIBUTE VALUES		Value	Blocked
→			<input type="checkbox"/>

Example: Create tool attribute values

We create four attribute values for the Type Option attribute Calibration:

TOOL ATTRIBUTE VALUES		Value ↑	Blocked
→	C0		<input type="checkbox"/>
	C1		<input type="checkbox"/>
	C2		<input type="checkbox"/>
	C3		<input type="checkbox"/>

G. To create translations for tool attribute values

1. Choose the icon, enter **sToolTracker Tool Attributes**, and then choose the related link.
2. On the **sToolTracker Tool Attributes** page, select a tool attribute of Type **Option** that you want to create translations of the values for. Then choose the **Tool Attribute Values** action.
3. On the **Tool Attribute Values** page, select a tool attribute value that you want to create translations for. Then choose the **Translations** action.
4. On the **Tool Attribute Value Translations** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.

Note

The **Tool Attribute Value Translations** are particularly useful, if you want to include tool attribute values later in reports.



Page: Tool Attribute Value Translations

TOOL ATTRIBUTE VALUES

Search New Edit List Delete Translations Page

Value	Blocked
→	<input type="checkbox"/>
	<input type="checkbox"/>

Example: Create tool attribute value translations

We create per tool attribute value of Calibration two translations. In our example German and English:

TOOL ATTRIBUTE VALUE TRANSLATIONS

✓ SAVED Search New Edit List Delete Page

Language Code ↑	Name
→ DEU	C0 - Translation German
ENU	C0 - Translation English

H. To assign tool attributes to tool categories

This section requires that a tool category has been created. For information to create a tool category, see „To create a tool category“ on page 36.

1. Choose the icon, enter **sToolTracker Tool Categories**, and then choose the related link.
2. On the **sToolTracker Tool Categories** page, select a tool category that you want to assign tool attributes to. Then choose the **Edit** action.
3. On the **Tool Category Card** page, on the **Attributes** FastTab, choose the lookup button in the **Attribute** field and select an existing tool attribute.
4. In the **Default Value** field, choose the lookup button and select a tool attribute value or type it in.
5. Repeat steps 3 and 4 for all tool attributes that you want to assign to the tool category.

Page: Tool Category Card - Attributes FastTab

Attributes | Manage

Attribute	Default Value	Inherited From ↓	Unit of Measure Code
→			

Note

Tool attributes for parent tool categories will be inherited to child tool categories. This is indicated by the **Inherited From** field on the **Attributes** FastTab.

Note

When you add an option attribute to a category, a default value needs to be assigned. If you wish to have a blank value, please add a blank option value entry to the attribute.

**Example: Assign tool attributes to tool category**

We assign the four previously defined attributes to the tool category *Dial_Indicators*. As default value for calibration, we select *C1*:



TOOL CATEGORY CARD



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DIAL_INDICATORS

Translations

General

Code	DIAL_INDICATORS	Parent Category	MEASUREMENT	
Description	Dial Indicators			

Attributes | Manage

Attribute	Default Value	Inherited From ↓	Unit of Measure Code
Version			
Measuring range			MM
Graduation			MM
→ Calibration	C1		

I. To assign tool attributes / tool attribute values to specific tools

This section requires that a tool has been created. For more information to create a tool, see „To create a new tool“ on page 15.

1. Choose the icon, enter **sToolTracker Tools**, and then choose the related link.
2. On the **sToolTracker Tools** page, select a tool that you want to assign tool attributes to. Then choose the **Attributes** action.
3. On the **Edit - Tool Attribute Values** page for the selected tool, on the **Tool Attribute Values** FastTab, choose the lookup button in the **Attribute** field and select an existing tool attribute.
4. In the **Value** field, choose the lookup button and select a tool attribute value or type it in.
5. Repeat steps 3 and 4 for all tool attributes that you want to assign to the specific tool.

Page: Edit - Tool Attributes Values - FastTab Tool Attribute Values



Tool Attribute Values | Manage

Attribute ↑	Value	Unit of Measure
→ Version	:	

Example: Assign tool attributes to a specific tool

We assign the four previously defined attributes to the tool *T-N000001* with following values:

Attribute	Value	Unit of Measure
Version	Shock-resistant	-
Measuring range	10	MM
Graduation	0,01	MM
Calibration	C1	

EDIT - TOOL ATTRIBUTE VALUES - T-N000001 . PRECISION LARGE DIAL INDICATOR

Tool Attribute Values | Manage

Attribute ↓	Value	Unit of Measure
→ Version	: Shock-resistant	
Measuring range	10	MM
Graduation	0,01	MM
Calibration	C1	

OK **Cancel**



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