



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 Microsoft Dynamics 365 Business Central.

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

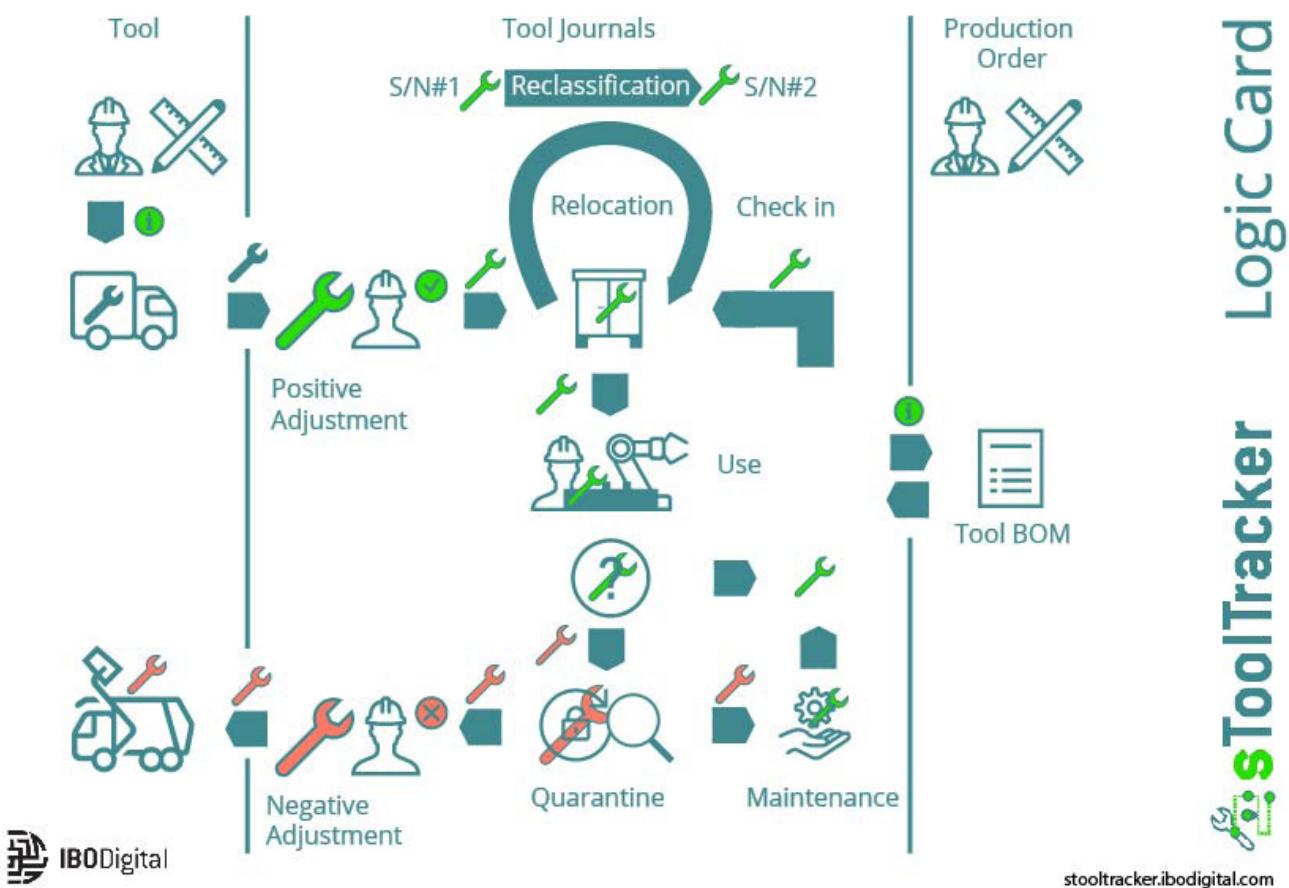
Example: Role Center - sToolTracker Team

The screenshot shows the Microsoft Dynamics 365 Business Central Role Center for the 'sToolTracker Team'. The top navigation bar includes 'ProductMaker' and 'sToolTracker Tools'. Below the navigation is a horizontal menu with links: Tools, Tool Categories, Tool Attributes, Positive Adjustment, Negative Adjustment, Relocation, Check-In, Maintenance, Quarantine, Reclassification, and Tool Availability. A central search bar is present. The main content area displays a summary of tool activities with seven cards: 'Tools in Use' (1), 'Tools in Maintenance' (1), 'Tools in Quarantine' (1), 'Available Tools' (184), 'Expired Tools' (0), 'Expiring Tools' (1), and 'Unused Tools' (0). Below this, a section titled 'Want to learn more about sToolTracker?' is visible.

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.
Quarantine	Tool journal - Entry type: Quarantine.
Reclassification	Tool journal - Entry type: Reclassification
Tool Availability	List of available tools

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



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	New Location 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
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

Tool Journal Entry Type	Description	Document No. (Examples)	Location Code	New Location Code	Ledger Entry
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	Location where tool is stored	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

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 user

A screenshot of the Microsoft Business Central interface showing the 'Available Roles' page. The search bar at the top contains the text 'stoolTracker'. Below the search bar, there is a table with two rows. The first row has a 'Display Name' column containing 'sToolTracker Administrator' and a 'Role' column containing 'sToolTracker Team'. The second row has a 'Display Name' column containing 'sToolTracker Team' and a 'Role' column containing 'sToolTracker Team'. The entire screenshot is framed by a light green border.

role. sToolTracker comes bundled with two pre-configured user roles.

Page: Available Roles - 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 role **sToolTracker Administrator**.
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 **sToolTracker Tool**.

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 Group Memberships | Manage

Code ↑		Name	Company Name ↑
D365 BACKUP/RESTORE		DB sichern oder wiederherst.	CRONUS DE
D365 BUS PREMIUM		D365 Premium Business-Zugriff	CRONUS DE
D365 INTERNAL ADMIN		Daten exportieren	CRONUS DE
D365 TROUBLESHOOT		D365-Problembhebung	CRONUS DE
EXCEL EXPORT ACTION		D365 Excel-Exportaktion	CRONUS DE
→ STOOLTRACKER TEAM	:	sToolTracker Team User Group	CRONUS DE



! Note

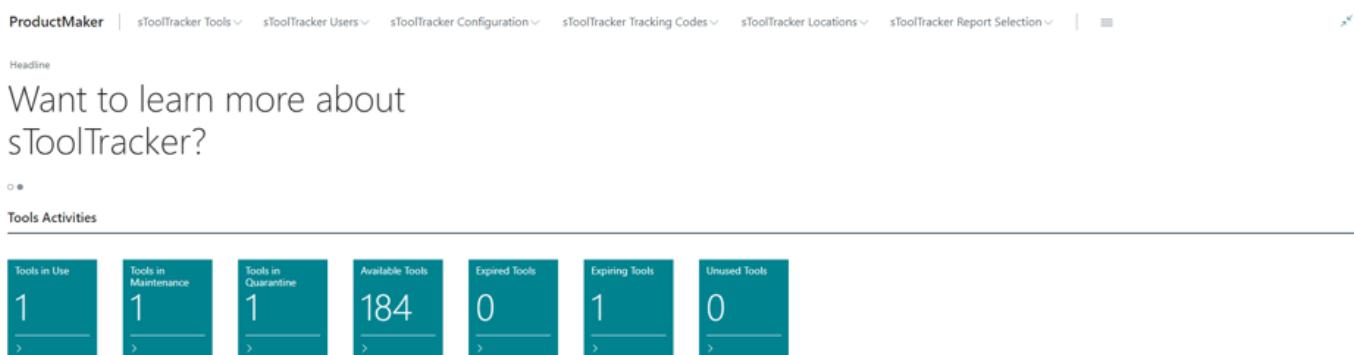
For more fine-grained control, you can duplicate and modify one of the existing sToolTracker permission sets or contact IBODigital support on stooltracker.ibodigital.com.

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 is a navigation bar with links for ProductMaker, sToolTracker Tools, sToolTracker Users, sToolTracker Configuration, sToolTracker Tracking Codes, sToolTracker Locations, sToolTracker Report Selection, and a search bar. Below the navigation bar, there is a headline section with the text "Want to learn more about sToolTracker?". Underneath this, there is a "Tools Activities" section featuring seven teal-colored boxes with white text and arrows:

Tools in Use	Tools in Maintenance	Tools in Quarantine	Available Tools	Expired Tools	Expiring Tools	Unused Tools
1	1	1	184	0	1	0



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.

Example: User Management for sToolTracker

The screenshot shows the sToolTracker User Management interface. At the top, there's a navigation bar with a back arrow, the title 'sToolTracker User Management', a 'Saved' status indicator with a checkmark, and several icons for search, new item, edit list, delete, manage subscription, and more options. Below the navigation is a section titled 'Licenses' with two boxes: 'Available Licenses' containing 4 items and 'Used Licenses' containing 2 items. Under 'Expiry Date', there's a date input field set to 7/29/2022 with a calendar icon. At the bottom is a table for managing users:

Name ↑		Created Date	
→	EMILY SMITH	:	21.06.2020
	MATTHEW SMITH		21.06.2020

E. Configure License Key

To get the license key please contact stooltracker@ibodigital.com. Once you received the license key you need to add/update the license key in sToolTracker using page **sToolTracker License Management**.

1. Choose the icon, enter **sToolTracker License Management**, and then choose the related link.



2. Enter the license key in License Key field.

Example: License Management for sToolTracker

A screenshot of a web-based application titled "sToolTracker License Management". At the top right, there are icons for saving, printing, and exiting. Below the title, a message says "Please enter your license key which you have received as a part of your subscription. If you do not have license key with you then please request a key by sending an email to stooltracker@ibodigital.com.". There is a text input field labeled "License Key" with a placeholder "...".

Note

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

F. 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	X	
TOOLBOM	Unique identifier for the tool BOM	X	
TOOLTCL	Number series for the tracking code: lot number	X	X
TOOLTCS	Number series fpr the tracking code: serial number	X	X
ASSEMBLYTOOL	Unique identifier for the assembly tool	X	
ASEEMBLYTOOL-TRACKING	Unique identifier for assembly tool tracking code	X	X

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

A screenshot of the sToolTracker software interface showing the 'No. Series' list screen. The table displays the following data:

Code ↑	Description	Starting No.	Ending No.	Last Date Used	Last No. Used	Default Nos.	Manual Nos.	Date Order
ASSEMBLYTOOL	Unique identifier for the assembly tool	T-A000001	—	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ ASSEMBLYTOOLTRACKING	Unique Identifier for assembly tracking code nos.	T-ATR0001	—	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TOOL	Unique identifier for the tool	T-N000001	—	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOOLBOM	Unique identifier for the tool BOM	T-B000001	—	—	—	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TOOLTCL	Number series for the tracking code: lot number	T-L000001	—	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TOOLTCS	Number series fpr the tracking code: serial number	T-S000001	—	—	—	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>



Note

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

G. To map number series for tools, tool BOMs and assembly tools

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 repective number series code.
3. In the **Tool BOM Nos** field, choose the lookup button and select the respective number series code.
4. In the **Assembly Tool Nos** field, choose the lookup button and select the respective number series code.



5. In the **Assembly Tool Tracking Code Nos** field, choose the lookup button and select the respective number series code.

For Dashboard Configuration:

1. In the **Tools Expiring (In Days) field**, specify the number of days value that will be used to get details about the tools expiring in specified days.
2. In the **Tools Unused (In Days) field**, specify the number of days value that will be used to get details about the tools not used in specified days.

Example: sTooltracker Configuration

The screenshot shows the sToolTracker Configuration page. At the top, there are buttons for edit, back, forward, and search, along with a 'Saved' indicator and a close button. The main area is divided into two sections: 'Number Series' and 'Dashboard Configuration'. In the 'Number Series' section, there are dropdown menus for 'Tool Nos.' (set to 'TOOL'), 'Tool BOM Nos.' (set to 'TOOLBOM'), 'Assembly Tool Nos.' (set to 'ASSEMBLYTOOL'), and 'Assembly Tracking Code Nos.' (set to 'ASSEMBLYTOOLTRACKING'). In the 'Dashboard Configuration' section, there are input fields for 'Tools Expiring (In Days)' (set to '30') and 'Tools Unused (In Days)' (set to '30').

H. To create tool locations

Note

The locations within sToolTracker specify where and what the current status of the tool is.

1. Choose the icon, enter **sToolTracker Locations**, and then choose the related link.
2. On the **sToolTracker Locations** page, choose **New** action.
3. Fill in the fields **Code** and **Name** as necessary. To read a short description what the field specifies, hover over the respective field. The **Location Policy** specifies the tool journal activities you can operate when it is located there. For more information, please see following Location Policy Matrix. The **Quality** field will be automatically updated.
4. Repeat steps 2 to 3 for all needed tool locations.



! Note

At least one location per location policy is needed to use all tool journal activities.

Location Policy		New Location				
		No Location	Storage	Work	Maintenance	Quarantine
Current Location	No Location		Positive Adjustment			
	Storage	Negative Adjustment	Relocation	Use	Maintenance	Quarantine
	Work		Check-In		Maintenance	Quarantine
	Maintenance	Negative Adjustment	Check-In		Maintenance	Quarantine
	Quarantine	Negative Adjustment	Check-In		Maintenance	Quarantine



stooltracker.ibodigital.com

Location
sToolTracker Policy Matrix

Example: sToolTracker Locations

STOOLTRACKER LOCATIONS					✓ SAVED	Print	Export	Close
Code ↑		Name		Location Policy	Quantity			
STORE1		Storage Area 1		Storage	0			
WORK1		Work Center 1		Work	0			
MAINTENANCE1		Calibration Center 1		Maintenance	0			
→ QUARANTINE1		Red Zone 1		Quarantine	0			



I. To create tool tracking codes

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



✓ SAVED



LN

General

Code Description

Serial No.

SN Specific Tracking

Lot No.

Lot Specific Tracking

Misc

Require Expiration Date Entry

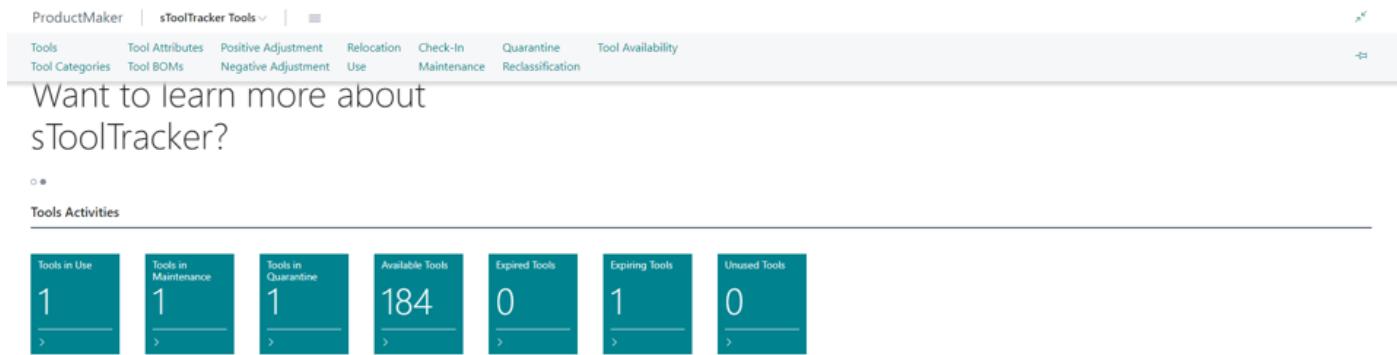


III. Work with Tools

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 Team** as your role.
3. Choose the **OK** button.

Example: Role Center - sToolTracker Team



The screenshot shows the sToolTracker Team role center. At the top, there's a navigation bar with links like ProductMaker, sToolTracker Tools, Tools, Tool Categories, Tool Attributes, Positive Adjustment, Negative Adjustment, Relocation, Check-In Use, Maintenance, Quarantine, Reclassification, and Tool Availability. Below the navigation bar, a message says "Want to learn more about sToolTracker?". Under "Tools Activities", there are seven cards showing tool counts: Tools in Use (1), Tools in Maintenance (1), Tools in Quarantine (1), Available Tools (184), Expired Tools (0), Expiring Tools (1), and Unused Tools (0).

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 50).

! 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.

! Note

If you create a tool, the system automatically creates a tool BOM including only this tool with quantity one.

Example: Create new tool

Tool Card

   
✓ Saved 

T-N000003

Process Report Tool History
Actions Related Fewer options

Tool

Tool No	T-N000003	Tool Category Code	DIAL_INDICATORS
Description	Precision large dial indicator	Location Code	STORE1
Blocked	<input checked="" type="checkbox"/>	Fixed Asset No	

Inventory

Total Qty	0	Qty Used in Assembly	0
Available Qty	0	Net Weight	0.24
Qty in Use	0	Net Weight UOM	KG
Qty in Maintenance	0	Unit of Measure	PC
Qty in Quarantine	0		

Tool Tracking

Tool Tracking Code	SN-LN+	Lot Nos	TOOLCL
Serial Nos	TOOLTCS	Maintenance Calculation	

Picture 

Attachments 1

Attributes

Attribute	Measuring Range	
-----------	-----------------	---



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 **sToolTracker Positive Adjustment** and then choose the related link.
2. On the **sToolTracker Positive Adjustment** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field. **Location Code** field is prefilled with the default location code 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.



Example: Add tool to tool inventory with tracking code

STOOLTRACKER POSITIVE ADJUSTMENT							✓ SAVED			
Manage	Post/Print	Line	Tool	More options						
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Quantity	Unit of Measure Code			
03.07.2020	: Positive Adjmt.	PO123456	T-N000003	Precision large dial indicator	STORE1	2	PC			



Manage | Actions Fewer options

Functions ▾

EDIT - TOOL TRACKING LINES

Quantity	SOURCE	TOOL TRACKING	UNDEFINED
2	SN-LN+	Description	Serial and lot number and expiry date requi...
Serial No.	Lot No.	Expiration Date	Quantity (Base)
T-S000001	LOT1	31.12.2025	1
→ T-S000002	⋮ LOT1	31.12.2025	1

D. To relocate tools (Relocation)

1. Choose the icon, enter **sToolTracker Relocation**, and then choose the related link.
2. On the **sToolTracker Relocation** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** field is 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, look up the location code where the respective tool should be relocated to.
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.** or **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. Fields are displayed depending on tracking code.
9. Repeat step 8 for all necessary tracking lines for the selected relocation line.
10. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.



11. Repeat steps 2 to 10 for all tools you want to relocate.

12. To post the relocation lines, choose the **Post** action.

Example: Relocate tool with tracking code

STOOLTRACKER RELOCATION

✓ SAVED

Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code
03.07.2020	: Movement	DO1234556	T-N000003	Precision large dial indicator	STORE1	STORE2	1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES

SOURCE		TOOL TRACKING		UNDEFINED	
Quantity	1	1	0	Serial and lot number and expiry date requi...	
Tool Tracking Code	SN-LN+	Description			
Serial No.	Lot No.	Expiration Date	Quantity (Base)		
T-S000001	LOT1	31.12.2025	1		
→	...		0		

E. To use tools (Use)

1. Choose the icon, enter **sToolTracker Use**, and then choose the related link.
2. On the **sToolTracker Use** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** field is 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, look up the location code where the respective tool is going to be used.
5. In the **Quantity** field, enter how many units of the tool you need for operation.
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.** or **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. Fields are displayed depending on tracking code.
9. Repeat step 8 for all necessary tracking lines for the selected use line.
10. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
11. Repeat steps 2 to 10 for all tools you want to use.
12. To post the use lines, choose the **Post** action.

Example: Use tool with tracking code

STOOLTRACKER USE

✓ SAVED

Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code
03.07.2020	: Use	JO123456	T-N000003	Precision large dial indicator	STORE1	WORK1	1	PC

[Manage](#) | Actions Fewer options

EDIT - TOOL TRACKING LINES

SOURCE	TOOL TRACKING	UNDEFINED	
Quantity	1	1	
Tool Tracking Code	SN-LN+	Description Serial and lot number and expiry date requi...	
Serial No.	Lot No.	Expiration Date	Quantity (Base)

T-S000002	LOT1	31.12.2025	1
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F. To quarantine tools (Quarantine)

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



3. **Location Code** field is 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, look up the location code where the respective tool is blocked in quarantine.
5. In the **Quantity** field, enter how many units of the tool you need to quarantine.
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.** or **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. Fields are displayed depending on tracking code.
9. Repeat step 8 for all necessary tracking lines for the selected tool reclassification journal line.
10. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
11. Repeat steps 2 to 10 for all tools you want to quarantine.
12. To post the quarantine lines, choose the **Post** action.

Example: Quarantine tool with tracking code

STOOLTRACKER QUARANTINE								✓ SAVED		
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code		
03.07.2020	: Quarantine	QR123456	T-N000003	Precision large dial indicator	STORE1	QUARANTINE1	1	PC		



Manage | Actions | Fewer options

Delete |

EDIT - TOOL TRACKING LINES |

Quantity	SOURCE	TOOL TRACKING	UNDEFINED
1	SN-LN+	Description	1
0		Serial and lot number and expiry date requi...	
Serial No.	Lot No.	Expiration Date	Quantity (Base)
SN1	LOT1	31.12.2025	1

G. To maintain tools (Maintenance)

1. Choose the icon, enter **sToolTracker Maintenance**, and then choose the related link.
2. On the **sToolTracker Maintenance** page, choose in the **Entry Type** field **Maintenance** and fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** field is 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, look up the location code where the respective tool is going to be maintained.
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.** or **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. Fields are displayed depending on tracking code.
9. Repeat step 8 for all necessary tracking lines for the selected tool reclassification journal line.



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

11. Repeat steps 2 to 10 for all tools you want to maintain.

12. To post the maintenance lines, choose the **Post** action.

Example: Maintain tool with tracking code

STOOLTRACKER MAINTENANCE

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Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code
03.07.2020	: Maintenance	MO123456	T-N000003	Precision large dial indicator	STORE1	MAINTENANCE1	1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES

SOURCE	TOOL TRACKING	UNDEFINED
Quantity	1	1
Tool Tracking Code	SN-LN+	Description

Serial and lot number and expiry date requi...
Serial No. Lot No. Expiration Date Quantity (Base)
→ SN2 : LOT1 31.12.2025 1

H. To check in tools (Check-In)

1. Choose the icon, enter **sToolTracker Check-In**, and then choose the related link.
2. On the **sToolTracker Check-In** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. In the **Location Code** field, look up the location code where the respective tool is currently located you want to check-in.
4. **New Location Code** field is prefilled with the default location code specified on the **Tool Card** page for the selected tool in the **Tool No.** field.
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.** or **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. Fields are displayed depending on tracking code.
9. Repeat step 8 for all necessary tracking lines for the selected tool reclassification journal line.
10. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
11. Repeat steps 2 to 10 for all tools you want to check in.
12. To post the check-in lines, choose the **Post** action.

Example: Check-In of tool with tracking code

STOOLTRACKER CHECK-IN							
				✓ SAVED			
Manage	Post/Print	Line	Tool				
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity
03.07.2021	: Check-In	JO123456	T-N000003	Precision large dial indicator	WORK1	STORE1	1 PC
Manage Actions Fewer options 							

EDIT - TOOL TRACKING LINES				
Quantity	SOURCE	TOOL TRACKING	UNDEFINED	
1			1	0
Tool Tracking Code	SN-LN+		Description Serial and lot number and expiry date requi...	
Serial No.	Lot No.	Expiration Date	Quantity (Base)	
→ T-S000002	: LOT1	31.12.2025	1	



I. To reclassify tools (Reclassification)

1. Choose the  icon, enter **sToolTracker Reclassification**, and then choose the related link.
2. On the **sToolTracker Reclassification** page, fill in the fields as necessary. To read a short description what the field specifies, hover over the respective field.
3. **Location Code** field is 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 **Quantity** field, enter how many units of the tool you want to reclassify.
5. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
6. 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.
7. Choose  in the **Serial No.** or **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.
8. In the **New Serial No.** and/or **New Lot No.** field specify the new values for the specific tracking code line.
9. Repeat step 8 for all necessary tracking lines for the selected tool reclassification journal line.
10. When all necessary fields are filled in, close **Edit - Tool Tracking Lines** page.
11. Repeat steps 2 to 10 for all tools you want to reclassify.
12. To post the check-in lines, choose the **Post** action.

Example: Reclassification of tool with tracking code

STOOLTRACKER RECLASSIFICATION

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Manage Post/Print Line Tool More options 

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Quantity	Unit of Measure Code
03.07.2020 	Reclassification	RC123456	T-N000003	Precision large dial indicator	STORE1	1	PC

[Manage](#) Actions Fewer options  

EDIT - TOOL TRACKING LINES 

SOURCE	TOOL TRACKING	UNDEFINED
Quantity	1	1
Tool Tracking Code	SN-LN+	Description Serial and lot number and expiry date requi...

Serial No.	New Serial No.	Lot No.	New Lot No.	Expiration Date	Quantity (Base)
→ SNS5 	NSN5	LOT2	NLOT2	05.02.2080	1

J. To remove tools (Negative Adjustment)

1. Choose the  icon, enter **sToolTracker Negative Adjustment** and then choose the related link.
2. On the **sToolTracker Negative Adjustment** page, 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 or lot number from the tool ledger entries.
5. Repeat step 5 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 negative adjustment lines, choose the **Post** action.

Example: Remove tool with tracking code

STOOLTRACKER NEGATIVE ADJUSTMENT ✓ SAVED

Manage Post/Print Line Tool More options

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Quantity	Unit of Measure Code
→ 03.07.2020	: Negative Adjmt.	CL123456	T-N000003	Precision large dial indicator	STORE1	1	PC

Manage Actions Fewer options

EDIT - TOOL TRACKING LINES

Quantity	Tool Tracking Code	Description	Serial No.	Lot No.	Expiration Date	Quantity (Base)
1	SN-LN+	Serial and lot number and expiry date requi...	→ SN4	LOT1	31.12.2025	1

K. To track tool ledger entries

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



Example: Tool Ledger Entries

STOOLTRACKER TOOL LEDGER ENTRIES							
Posting Date	User	Entry Type	Serial No.	Lot No.	Expiry Date	Document No.	Tool No. ▾
→ 03.07.2020	:	Negative Adjmt.	SN4	LOT1	31.12.2025	CL123456	T-N000003 Precision
03.07.2020		Check-In	T-S000002	LOT1	31.12.2025	JO123456	T-N000003 Precision
03.07.2020		Movement	T-S000002	LOT1	31.12.2025	JO123456	T-N000003 Precision
03.07.2020		Quarantine	SN1	LOT1	31.12.2025	QR123456	T-N000003 Precision
03.07.2020		Movement	SN1	LOT1	31.12.2025	QR123456	T-N000003 Precision
03.07.2020		Maintenance	SN2	LOT1	31.12.2025	MO123456	T-N000003 Precision
03.07.2020		Movement	SN2	LOT1	31.12.2025	MO123456	T-N000003 Precision
03.07.2020		Use	T-S000002	LOT1	31.12.2025	JO123456	T-N000003 Precision
03.07.2020		Movement	T-S000002	LOT1	31.12.2025	JO123456	T-N000003 Precision
03.07.2020		Relocation	T-S000001	LOT1	31.12.2025	DO1234556	T-N000003 Precision
03.07.2020		Movement	T-S000001	LOT1	31.12.2025	DO1234556	T-N000003 Precision
03.07.2020		Positive Adjmt.	T-S000002	LOT1	31.12.2025	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	T-S000001	LOT1	31.12.2025	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	SN5	LOT2	05.02.2080	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	SN4	LOT1	31.12.2025	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	SN3	LOT1	31.12.2025	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	SN2	LOT1	31.12.2025	PO123456	T-N000003 Precision
03.07.2020		Positive Adjmt.	SN1	LOT1	31.12.2025	PO123456	T-N000003 Precision

IV. Work with Assembly Tools

A. To create an assembly tool

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



Example: Create new assembly tool

Assembly Tool Card

T-A000001

Process Report Tool History More options

Assembly Tool

Assembly Tool No.	T-A000001	...	Tool Category Code	
Description	Assembled Tool		Location Code	STORE2

Inventory

Total Qty	0	Qty in Use	0
Available Qty	0	Unit of Measure	PC

Lines Manage

Tool No	Description	Category	Quantity Per	Unit of Measure Code
T-N000005	Quick turn clapping toolholder		1	PC
→ T-N000006	CNMG120416 HB7035-1		1	PC

B. To assemble an assembly tool

Before using assembly tool in production order, the tool has to be assembled first. Only then, it is possible to use that tool in production journal.

1. On **Assembly Tool Card** select **Assembly** action from **Process** menu.
2. Update the tracking lines if required and select the **Post** action.
3. sToolTracker will create automatically a new assembly tracking number. Select the **Close** action to assemble the tool.



Example: Assemble an assembly tool

Edit - sToolTracker Assembly Journal - Assembly Journal

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Quantity	Unit of Measure Code
→ 7/4/2022	Assembly	AM123456	T-N00005	Quick turn clamping toolholder	STORE1	1	PC
7/4/2022	Assembly	AM123456			STORE2	1	PC

Edit - Assembly Tracking Code - T-ATR0001

Manage

Assembly Number T-ATR0001

Close

Close

C. To use an assembly tool

1. On the **Assembly Tool Card** choose the **Use** action from **Process** menu.
2. Select the **storage location** and the **assembly tracking code number** (this is the same generated tracking number at the time of assembly).
3. To post the use lines, choose the **Post** action.

Example: Use an assembly tool

Use - Use

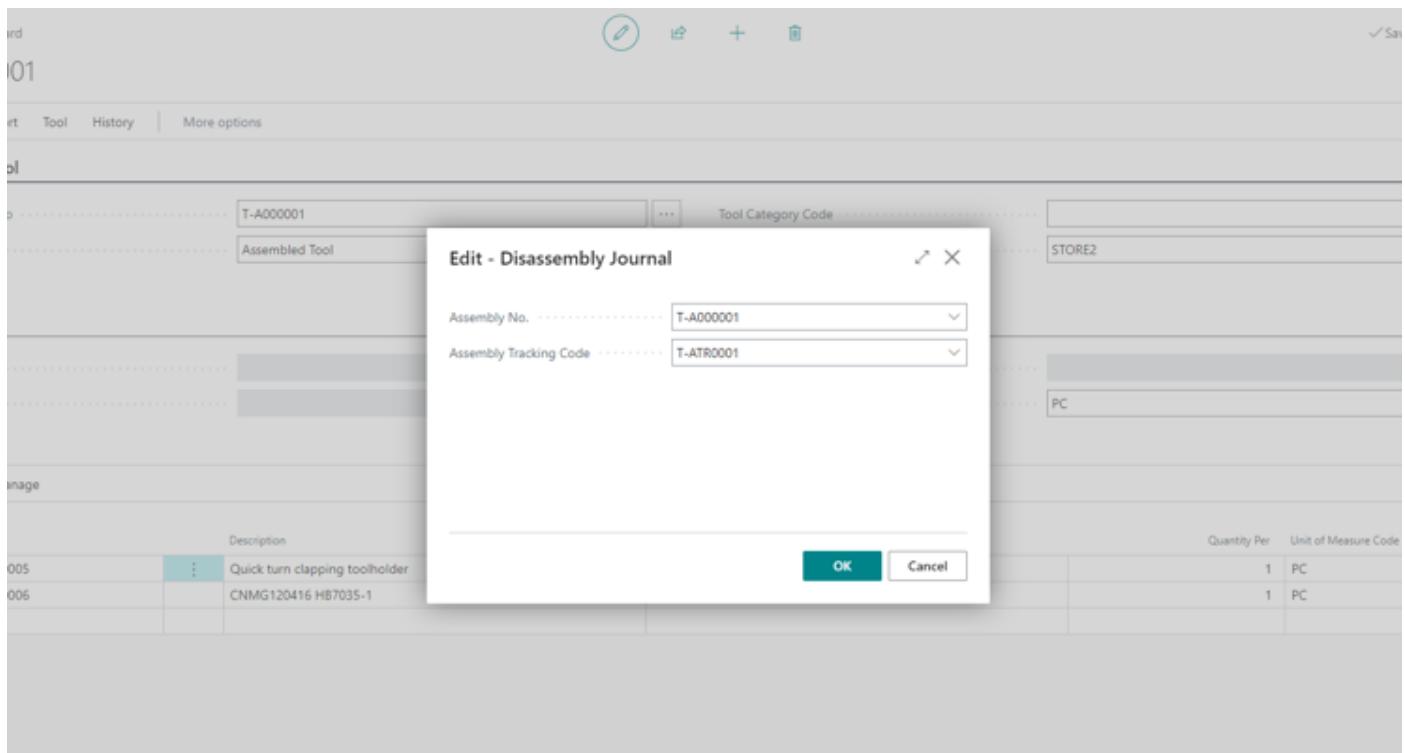
Entry Type	Document No.	Type	Tool No.	Description	Location Code	New Location Code	Assembly Tracking Code	Quantity	Please see...
Use	AS	Assembly	T-A000001	Assembled Tool	STORE2	WORK1	T-ATR0001	1	<input checked="" type="checkbox"/>



D. To disassemble an assembly tool

1. On the **Assembly Tool Card** choose the **Disassemble** action from **Process** menu.
2. Select the **assembly tracking code number** of the assembled tool, which should be disassembled.
3. Confirm selection with the **OK** action. Tool will be automatically disassembled. Single parts of the disassembled tool will be added back to the default storage location.

Example: Disassemble an assembly tool





V. 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 work location where the tool is going to be used.
 4. 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.



Example: Create new tool BOM

Tool BOM

Operation 1

Last Modified Date: 7/4/2022

Owner: VIKRANT.ABDAGIRE

NC Tool No: T-B00001

Type	Tool No	Description	Category	Tool Set	Use Location Code	PreAsse...	Quantity Per	Unit of Measure Code
→ Tool	T-N000004	HSK-A 100		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000005	Quick turn clapping toolholder		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000006	CNMG120416 HB7035-1		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000007	HSK-A 63		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000008	ER clamping nut CP standard 25		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000009	Machine tap HSS-E-PM Form B 6G M8		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000010	Quick-change tapping chuck M3-12		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000011	Solid carbide deburrer 90 Deg 10 mm		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000012	HP collet 10 mm		WORK1	<input type="checkbox"/>		1	PC
Tool	T-N000013	Solid carbide jobber drill extra stub 6mm		WORK1	<input type="checkbox"/>		1	PC

B. To map tool BOM to routing operation

- Choose the icon, enter **Routings**, and then choose the related link.
- On the **Routings** page, select the routing you want to modify and choose the Edit action.
- On the **Routing** page, on the Lines FastTab, select the operation you want to modify and select the **Tool BOMs** action.
- 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.
- Repeat step 3 to 4 for all operations you want to modify.



Example: Map tool BOM to routing operation

Manage

EDIT - ROUTING TOOL BOM MAPPING - 1000 · 10

Tool BOM: T-B000001

A screenshot of a software interface titled "Edit - Routing Tool BOM Mapping". The window shows a single entry: "Tool BOM" set to "T-B000001". There are standard window controls (minimize, maximize, close) at the top right.

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

Tool No.	Description	Tool Set	Use Location Code	Quantity per	Unit of Measure Code
T-N000004	HSK-A 100	T-N000004	WORK1	1	PC
T-N000005	Quick turn clamping toolholder	T-N000004	WORK1	1	PC
T-N000006	CNMG120416 HB7035-1	T-N000004	WORK1	1	PC
T-N000007	HSK-A 63	T-N000007/1/2/3	WORK1	1	PC
T-N000008	ER clamping nut CP Standard 25	T-N000007/1	WORK1	1	PC
T-N000011	Solid carbide deburrer 90° 10 mm	T-N000007/1	WORK1	1	PC
T-N000010	Quick-change tapping chuck M3-12	T-N000007/2	WORK1	1	PC
T-N000009	Machine tap HSS-E-PM Form B 6G M8	T-N000007/2	WORK1	1	PC
T-N000012	HP collet 10 mm	T-N000007/3	WORK1	1	PC
T-N000013	Solid carbide jobber drill extra stub 6,8 ...	T-N000007/3	WORK1	1	PC

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 - sToolTracker Use** 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 use 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 use journal lines, choose the **Post** action.

Example: Use tools in production

EDIT - STOOLTRACKER USE - USE								
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code
04.07.2020	Use	PO123456/1...	T-N000004	HSK-A 100	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000005	Quick turn clamping toolholder	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000006	CNMG120416 HB7035-1	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000007	HSK-A 63	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000008	ER clamping nut CP Standard 25	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000011	Solid carbide deburrer 90° 10 mm	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000010	Quick-change tapping chuck M3-...	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000009	Machine tap HSS-E-PM Form B 6...	STORE1	WORK1	1	PC
→ 04.07.2020	: Use	PO123456/1...	T-N000012	HP collet 10 mm	STORE1	WORK1	1	PC
04.07.2020	Use	PO123456/1...	T-N000013	Solid carbide jobber drill extra stu...	STORE1	WORK1	1	PC

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 - sToolTracker Check-In** 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 check-in 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 check-in journal lines, choose the **Post** action.

Example: Checkin tools in production

Manage Post/Print Line Tool | More options

EDIT - STOOLTRACKER CHECK-IN - CHECK-IN

Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	New Location Code	Quantity	Unit of Measure Code
04.07.2020	Check-In	PO123456/1...	T-N000004	HSK-A 100	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000005	Quick turn clamping toolholder	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000006	CNMG120416 HB7035-1	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000007	HSK-A 63	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000008	ER clamping nut CP Standard 25	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000011	Solid carbide deburrer 90° 10 mm	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000010	Quick-change tapping chuck M3-...	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000009	Machine tap HSS-E-PM Form B 6...	WORK1	STORE1	1	PC
→ 04.07.2020	: Check-In	PO123456/1...	T-N000012	HP collet 10 mm	WORK1	STORE1	1	PC
04.07.2020	Check-In	PO123456/1...	T-N000013	Solid carbide jobber drill extra stu...	WORK1	STORE1	1	PC



VI. 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 48.

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 41.

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

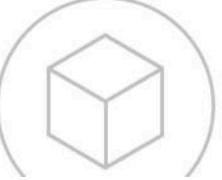

+

✓ SAVED



T-N000014

Process Tool History Actions Navigate Fewer options 

Tool		Picture	
Tool No	T-N000014	Location Code	<input type="text"/>
Description	Precision large dial indicate	Zone Code	<input type="text"/>
Blocked	<input checked="" type="checkbox"/>	Fixed Asset No	<input type="text"/>
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="text"/>	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

Print Copy Reset

Search New Edit List Delete Edit View Tool Attribute Values Translations Page
Filter Sort

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"/>
			<input type="checkbox"/>
			<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"/>	<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					
				Blocked 	
→	Value				<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 41.

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 18.

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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