



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

User Manual
for Version 2



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I. Welcome to sToolTracker

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.

ProductMaker | sToolTracker Tools ▾ | ≡

HEADLINE

Want to learn more about sToolTracker?

○ ●

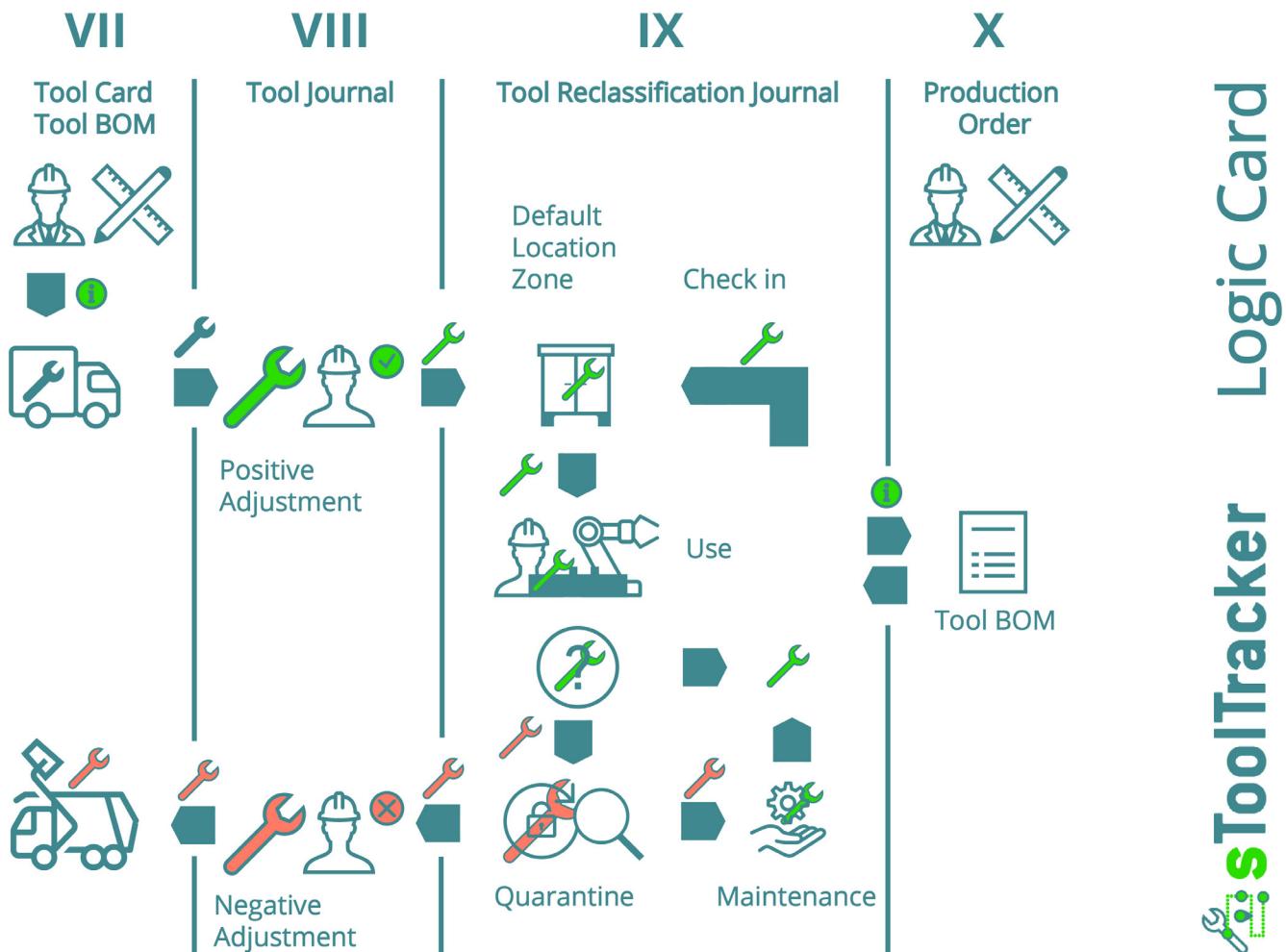
Activities

Tools Activities



[Back to top](#)

We developed a logic card to get a quick overview how sToolTracker works:



The roman numerals refer to the chapters in this user manual where you find more information.

 [Download Logic Card](#)

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



II. Setup sToolTracker in 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

[Change Web Service Key](#)[Effective Permissions](#)[More options](#)[User Groups](#)[Manage](#)

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 the the existing sToolTracker permission sets or contact IBODigital support on stooltracker.ibodigital.com.



C. 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. The main area displays a table with two rows of user data. The columns are labeled '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 right corner of the interface has icons for print, refresh, and search.

D. 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-N000001	_		04.06.2020	T-N000012	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TOOLBOM	MyToolBOMs		T-B000001	_		28.05.2020	T-B000001	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TOOLBOMV	MyToolBOMVersions		T-V000001	_	_	_		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TOOLTCL	MyToolTrackingLotNo		T-L000001	_		27.05.2020	T-L000002	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
TOOLTCS	MyToolTrackingSerialNo		T-S000001	_		27.05.2020	T-S000002	<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.

E. 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 with the 'Number Series' section. At the top right are icons for edit, add, delete, and save (marked with a checkmark). Below the section title, there are two dropdown menus: 'Tool Nos' set to 'TOOL' and 'Tool BOM Nos' set to 'TOOLBOM'. The rest of the page is blank.



III. Work with Locations Codes and Zones Codes

A. To create a location code or a zone code

To avoid double setup of data, sToolTracker looks up the location and zones, which are setup in your warehouse functionality in Business Central.

Zone codes used in advanced warehousing are optional for the use of sToolTracker.

Note

If you need to specify bins for tools, please contact us.

B. To assign a default location (and) zone code

This section requires that a tool has been created. For more information to create a tool, see „To create a new tool“ on page 27.

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 tracking codes to. Then choose the **Edit** action.
3. On the **Tool Card** page for the selected tool, on the **Tool** FastTab, choose the lookup button in the **Location Code** field (default storage location) and select an existing location code.
4. In case using advanced warehousing, choose also the lookup button in the **Zone Code** field (default storage zone) and select an existing zone code.

Example: Tool Card - FastTab: Tool

In our case the default location of our tool is SITE1 and default zone INSPEC1:

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



IV. Work with Tool Tracking Codes

A. 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

B. To assign a tool tracking code

This section requires that a tool has been created. For more information to create a tool, see „To create a new tool“ on page 27.

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 tracking codes to. Then choose the **Edit** action.
3. On the **Tool Card** page for the selected tool, on the **Tool Tracking** FastTab, choose the lookup button in the **Tool Tracking Code** field and select an existing tool tracking code.
4. Based on the tool tracking code selection, choose the lookup button in the **Lot Nos** field and or **Serial Nos** field and select the respective number series.
5. Fill in the optional field **Maintenance Calculation** the formula for calculating the maintenance / expiration date of the tool.



Example: Tool Tracking FastTab on Tool Card

We want to track a tool with serial number and lot number and choose therefore the tracking code SN-LN. As default numbers for the lot numbers we choose the number series TOOLTCL and for the serial numbers we choose the number series: TOOLTCS:

Tool Tracking

Tool Tracking Code	<input type="text" value="SN-LN"/>	Lot Nos	<input type="text" value="TOOLTCL"/>
Serial Nos	<input type="text" value="TOOLTCS"/>	Maintenance Calculation	<input type="text"/>

v. Work with Tool Categories

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.

You can also work with tool attributes to find tools by characteristics. For more information, see „To assign tool attributes to tool categories“ on page 24.

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 24.

STOOLTRACKER TOOL CATEGORIES					
Search		New	Edit List	Delete	Edit
View		Page			
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 16.

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:

The screenshot shows the 'TOOL CARD' interface for tool T-N000014. The card includes fields for Tool No, Description, Location Code, Zone Code, Blocked status, Fixed Asset No, and Tool Category Code. The 'Tool Category Code' field is set to 'DIAL_INDICATORS'. A green circular icon with a white gear symbol is positioned next to the dropdown menu for the tool category code. To the right of the card, there is a placeholder for a 'Picture' containing a simple line drawing of a cube inside a circle.

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

Picture



VI. Work with Tool Attributes

When your employees inquire about a tool, they may ask or search according to characteristics, such as diameter, material, measuring range etc. To provide this service to your employees, you can assign tool attribute values of different types to your tools. These attributes can be used when searching for tools and also to give usage guidance.

A. 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	<input type="text" value="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	-



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

STOOLTRACKER TOOL ATTRIBUTES



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"/>

B. To create translation for tool attribute

- Choose the icon, enter **sToolTracker Tool Attributes**, and then choose the related link.
- On the **sToolTracker Tool Attributes** page, select a tool attribute of that you want to create translations for. Then choose the **Translations** action.
- 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 Filter Sort

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
→		

C. 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		
 Search	 New	 Edit List
 Delete	 Translations	Page
Value		Blocked 
→		

Example: Create tool attribute values

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



TOOL ATTRIBUTE VALUES

✓ SAVED

Search New Edit List Delete Translations Page

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

D. 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="text"/>	<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:

A screenshot of a software interface titled "TOOL ATTRIBUTE VALUE TRANSLATIONS". At the top right, there are buttons for "SAVED" with a checkmark, a refresh arrow, and a back arrow. Below the title is a toolbar with "Search", "+ New", "Edit List", "Delete", and "Page" buttons. To the right of the toolbar are filter and sort icons. The main area is a table with two rows. The first row has "DEU" in the "Language Code" column and "C0 - Translation German" in the "Name" column. The second row has "ENU" in the "Language Code" column and "C0 - Translation English" in the "Name" column. The table has columns for "Language Code" and "Name".

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

E. 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 16.

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

A screenshot of a software interface titled "Tool Category Card - Attributes FastTab". At the top left, there are buttons for "Attributes" and "Manage". At the top right, there is a refresh arrow icon. The main area is a table with four columns: "Attribute", "Default Value", "Inherited From ↓", and "Unit of Measure Code". The "Attribute" column has a dropdown arrow icon. The "Default Value" column has a small blue square icon. The other two columns are empty. The table has headers for "Attribute", "Default Value", "Inherited From ↓", and "Unit of Measure Code".

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
 + 
✓ SAVED  

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		

F. 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 27.



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

VII. Work with Tools

A. 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 25).

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

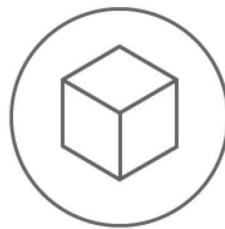
Inventory

Inventory	0	Net Weight	0,00
Qty in Use	0	Net Weight UOM
Qty in Maintenance	0	Unit of Measure
Qty in Quarantine	0		

Tool Tracking

Tool Tracking Co...	...	Lot Nos
Serial Nos	Maintenance Cal...	...

Picture



Attachments

Attachments 0

Attributes

Attribute
Version
Measuring range
Graduation
Calibration



Example: Create new tool

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



TOOL CARD



✓ SAVED



T-N000001

✗ 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

B. 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-N000005/2 and T-N000005/3:



TOOL BOM



+



✓ SAVED



Operation 1 - XXXXX.XX

No	T-B000001	Version Nos.	TOOLBOMV
Description	Operation 1 - XXXXX.XX	Active Version	
Status	New	Last Modified Date	14.06.2020
Search Name	Operation 1		

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	



VIII. Work with Tool Journal

A. To register tool to inventory (> Tool Journal: Positive Adjustment)

With the positive adjustment function you can register tools to the actual inventory (e.g. to register 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					Unit of Measure Code
Posting Date	Entry Type	Document No.	Tool No.	Description	Location Code	Zone Code	Quantity		
	Positive Adjmt.						0		



Example: Register tool with tracking code

TOOL JOURNALS ✓ SAVED

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

Manage Actions Fewer options

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

B. To unregister tool from inventory (> Tool Journal: 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								✓ SAVED			
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			
<input type="button" value=""/>	: Negative Adj...						0				

Example: Unregister tool with tracking code

TOOL JOURNALS								✓ SAVED			
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			
23.06.2024 <input type="button" value=""/>	: Negative Adj... DO123456	T-N000005	HSK-A 63		SITE1	TSTORE1	2				

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
Yes	SN1	Yes		
→ Yes	: SN2	Yes		

IX. Work with Tool Reclassification Journal

Entry type		Document No.	Location Code Zone Code	New Location Code New Zone Code	Status after post
Check-Out	Use	Use of tool for production, construction, service etc.	Production order, job order or service order etc.	Location from where tool is picked	Location where tool is used
	Maintenance	Maintain / calibrate tool for requalification	Purchase order, maintenance plan, calibration plan etc.	Location from where tool is picked	Location where tool is maintained (can be the same location or also an external provider)
	Transfer	Transfer tool to a different location	Transfer order etc.	Location from where tool is picked	Location where tool is transferred to
	Quarantine	Move tool to a blocked zone.	Production order, job order, service order, claim report etc.	Location from where tool is picked	Location where tool is quarantined.
Check-In	Release / store tool for next transaction.	Production order, job order or service order etc.	Location from where tool is picked	Location where tool is pushed away.	-

A. To transfer 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 **Transfer** 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 should be transferred.
 3. In the **Quantity** field, enter how many units of the tool you want to transfer.
 4. Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
 5. 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 transfer.
8. 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
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

B. 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

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	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			
					Quantity (Base)
					1

C. 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 **Maintenance** 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 maintain.
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 maintain.
 8. To post the tool reclassification journal lines, choose the **Post** action.



Example: Maintain 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	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.	Expiration Date	New Expiration Date	Quantity (Base)
→ No	SN1		Yes					1

D. To quarantine tools

- Choose the icon, enter **Tool Reclassification Journals**, and then choose the related link.
- 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.
- 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.
- 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.
- In the **Quantity** field, enter how many units of the tool you need to quarantine.
- Choose **Tool Tracking Lines** action for selected line to add tracking information if required by the respective tool tracking code of the selected tool.
- 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										✓ 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	: 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	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

E. 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.
 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 want to check in.
 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 check in.
8. 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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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

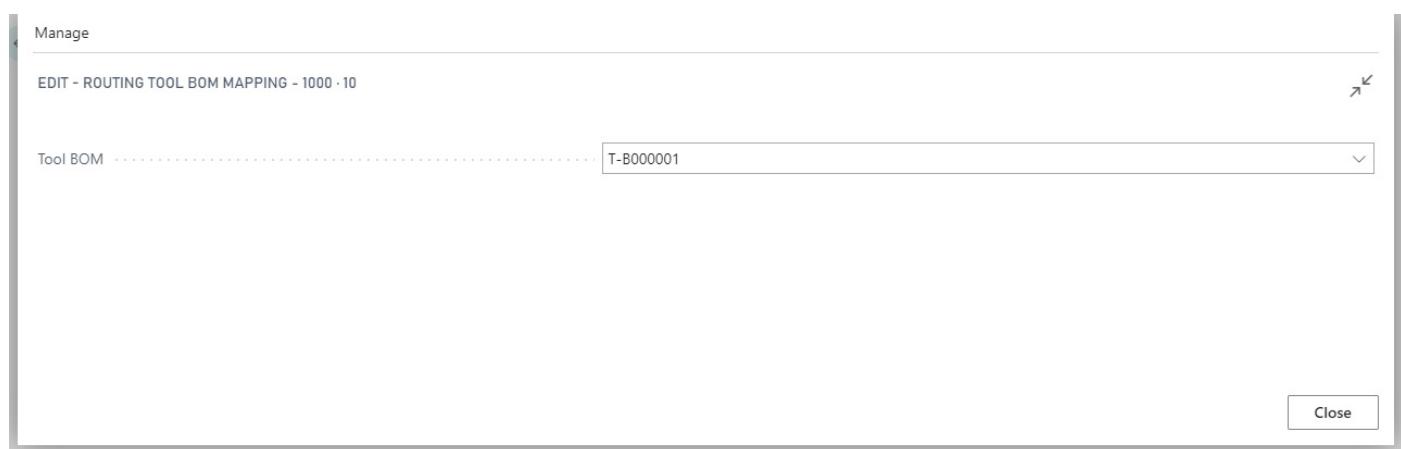
SOURCE		TOOL TRACKING		UNDEFINED				
Quantity	1	1	0					
Tool Tracking Code	SN	Description	Serial number required					
Availability, Serial No.	Serial No.	New Serial No.	Availability, Lot No.	Lot No.	New Lot No.	Expiration Date	New Expiration Date	Quantity (Base)
→ No	: SN1		Yes					1

x. Work with Tool BOMs in Production

A. 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



B. 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

EDIT - PRODUCTION ORDER TOOL BOM						
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	

C. 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

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
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	

D. 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

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



XI. Control and Monitor Tools

A. 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								✓ SAVED			
		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		

B. To use sToolTracker Expert 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: sToolTracker Expert Role Center

ProductMaker | sToolTracker Tools ▾ | ☰

HEADLINE

Want to learn more about sToolTracker?

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Activities

Tools Activities



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