



ATICTS

Overview Training Workbook

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Chapter 1 Introduction

ATICTS stands for Automated Tool Inventory Control Tracking System . ATICTS is an automated method of managing valuable assets and consumable items. It provides perpetual accountability, location, condition, and usage history across several points of inventory control

The training manuals provided with ATICTS are divided up by core functions. This particular manual is designed for a general overview of the ATICTS product.

Chapter Overview

- Chapter 2** This chapter covers overview of how the Workbooks are divided..
- Chapter 3** An introduction into the ATICTS product is presented in this chapter.
- Chapter 4** Computer controls are briefly discussed in this chapter.
- Chapter 5** This chapter lays out a definition of ATICTS terms.
- Chapter 6** You are given an overview of how to enter the application an how to navigate.
- Chapter 7** The Help menu is described in this chapter.
- Chapter 8** Naming conventions for the various master files is discussed in this chapter.

Related Documentation

Additional manuals are available that cover other subjects including Crib Attendant and System Administration functions.

Please refer to the Help documents named **Introduction** and **Overview of Major Master Files** for more clarification of this subject.

Chapter 2 ATICTS Workbook Overview

Learning ATICTS

ATICTS is a Windows based program. ATICTS is also the user interface for D3, a powerful 3 dimensional database developed by Raining Data, Inc. ATICTS and D3 have evolved from over 20 years of industry development to provide an extensive set of features. You will only need to learn parts of this program that are relevant to your work.

Using the ATICTS workbook

This is the ATICTS Training Workbook. It is designed for **the Data Enterprises of the Northwest, Inc. (DEN)** on-site training classes. In it you will find exercises and key points covering nearly all the features of ATICTS. There are a series of workbooks that pertain to key functions within the application. To most cases, these workbooks are a breakdown of responsibilities. In some cases, however, there are exercises that are duplicated as necessary.

- Workbook chapters are generally divided into Application functions, additional Crib Attendant Functions and Reports. The footer of each page displays the name of the workbook and the page number referenced as chapter-page.
- Program topics are written to show the menu path for easy location. The following example is found under the Main Menu of Crib Processes, in the Program Check-In/Out Processes and within the program the sub-menu of Functions/Commands.

Check-In/Return (CribProcesses, Check-In/Out Processes, Functions/Commands)

- All exercises are clearly marked and use barcodes where for easy data entry. Each exercise is numbered and there is text to describe the purpose of the step and the action to take.
- At the right side of the exercise you will find a barcode if it applies or the information necessary for the prompt. Command buttons are indicated with a background color and are framed with a box.
- Notes that provide special information are framed to make them stand out. They describe settings in the System Control File or important conditions about the step.
- As you practice with these exercises you will find your own patterns of use that are relevant to the way you work. Finally, you will find this workbook most useful to you if you mark it up, take notes, underline and draw pictures. This will help you recall more information after the training sessions.

Chapter 3 Introduction to ATICTS

Core Product

ATICTS stands for Automated Tool Inventory Control Tracking System . ATICTS is an automated method of managing valuable assets and consumable items. It provides perpetual accountability, location, condition, and usage history across several points of inventory control.

All items, jobs and personnel can be identified with bar coded labels that allow for rapid and accurate input of information.

ATICTS tracks movements between locations as well as issuance to – and return from – employees, departments, machines/jobs, and vendors. ATICTS also records found items and notifies the correct department when replacement items are needed.

The system will maintain inventory re-order points, enabling the purchasing of necessary items at the proper time and quantity to maximize available discounts.

Also included in the base product is a complete selection of reports to provide for effective use of tracked data.

Function Overview

The main purpose of the ATICTS application is the management of items and inventory. These items are managed by internal functions. Each of the day-to-day functions is accessed from the Crib Processes menu. Here is a brief description of these functions.

Item Check-In / Out Process	This process is used to track the return and issue of items to authorized personnel. It provides accountability, location, condition, and history for each item.
Item Repair Process	This function manages the transfer of items in need of repair and tracks the actual movement to and from each location. It also provides valuable repair history for each item.
Found Item Process	This process returns an item to inventory when it had been previously categorized in the system as lost. (It is available only to users who are not using the Lost & Stolen Item add-on module.)
Inventory Control	This function is used to take inventory and track receipt of non-requisition inventory. It also manages items stored in multiple locations and tracks the movement of items between inventory points.
Batch Update Process	If your location uses a portable barcode reader, this function uploads stored transaction and inventory information to the system.
Inquiry Process	This function provides the user with a variety of search tools for locating items in inventory or Issued. This also displays Consumable Item usage.

Additional Modules

There are several add-on modules available from Data Enterprises. They have been designed to meet the unique needs of our customers. The following is a list of these modules and descriptions.

Note: Many of these modules are controlled by the System Control File setup. If the characters for the menu choice appear light gray in color or you can not find the menu option, it may be disabled with your installation. Contact your System Administrator or Training Manager and continue on with the next section of the Training Manual.

- Portable Reader Feature** The portable barcode reader lets you roam wherever you need to perform check-in, checkout, physical inventorying, and crib-to-crib transferring of items. Information is automatically downloaded into the ATICTS files when you return to your workstation.
- Calibration Tracking** This module is used to record the information pertaining to items that require scheduled calibration and quick check (post-test verification). The system will maintain schedules for calibration, produce recall reports, and report data on calibration history.
- Purchase Order Management** Authorize, order, and receive inventory with the Purchase Order module. This process will automatically update both your gross quantities and individual inventory point quantities for each item. The system will suggest replenishment when necessary, print purchase orders, and track the status for each order.
- Kitting** Kitting allows you to group any number of items into a group, which is then tracked as a single item. Groups can also be comprised of sub-groups. For instance, a set of sockets can be grouped into one item and that socket set can be part of a tool kit. The tool kit would also be tracked in the system as one item. Multiple reports can be generated to track these kits.
- Licensing** The Licensing Module prevents employees from checking out items they are not authorized to use.
- Manufacturing Tracking** Track specialized tooling from the design phase through disposal. Track items required to produce a part, the parts to make a finished product, and the contracts outstanding on the finished product. Revise, modify, and locate specialized tooling.
- Reservation** Reserve items to ensure availability for future projects. Permits unlimited reservations.
- M&TE** Measuring and Test Equipment Tracking manages usage data for calibrated items. Unlike the basic system which tracks single job numbers against an item, M&TE tracks multiple uses for each issue and the values used at. In addition, it tracks non-conformance investigations, out of calibration and out of tolerance trend analysis. This module is used in special areas such as nuclear power plants.

Chapter 4 Computer Controls

The following mouse actions, keyboard keys, and application controls are commonly used with ATICTS.

Mouse Actions

The mouse has a left and right button. Some mice have a button in the middle but this is not used with ATICTS. Here is what you can do with the buttons and mouse movements.

- Click:** Quickly press and release the left mouse button.
- Double Click:** Click the left mouse button twice quickly.
- Drag:** Press and hold the left mouse button while you move the mouse.
- Right Click:** Just like the Click but you do it with the right button.

Keyboard Keys

There are a few special keys and key combinations that are commonly used by ATICTS.

- Tab:** Moves to the next text box or button on the screen
- Enter:** Moves to the next text box or presses the default button. The default button is indicated by a thin black square around it.
- F1:** Displays a Help window.
- F4:** Displays all the options in a dropdown list box.
- F5:** Enters a default value such as the date. This will be shown in red on some windows.
- Alt-“key”:** To select a menu item or button hold the Alt key down and press the underlined letter that appears on the menu item or button.
- Delete:** Deletes highlighted text in a text box.
- Arrow Keys:** When there are multiple Radio Buttons (Options) you may select the desired Option by using the Up and Down arrow keys.

Software Controls on the Computer Screen

Use the mouse to manipulate these software controls.

- Exit button:** Closes the current window you are working on without saving your changes.
- Cancel button:** Discards your changes but does not close the window.
- Save button:** Saves your changes to the system and does not close the window.
- OK:** Saves your changes and closes the window.
- Search:** Displays a list of information.
- Delete button:** Deletes the information in the current text box or deletes the current record in the window.
- Scroll bar:** Click on the arrows at the ends of the scroll bar or drag the small box in the middle.

Dropdown List box: Click the arrow button at the right side of the text box or press F4 to see more text choices.

Chapter 5 Special Terms

These are words and phrases that have a special meaning for ATICTS and this training program.

Special Terms

Account	A database or collection of files.
Badge #	A number that can be used in place of an Employee Id.
CCO	A special type of Consumable Item that is required to be returned.
Crib	Name or number for an area that Items are stored in.
Department Id	Identifier of a master file record representing a department that groups Employees, Jobs or Machines.
Description	“English language” description of an Item.
Employee Id	Identifier of a master file record for a person.
Entity	A Department, Job, Machine or Vendor to which Items may be issued. Also referred to as Issuee.
Field	The place where you type text or text appears.
Has	Current number of items checked out to an Employee or entity.
Issue	Check-out an item from a crib to an Employee or entity.
Issue Type P	Permanently issued item without a due date.
Issue Type S	Special issued Item with a due date set by the Crib Attendant.
Issue Type T	Temporary issued Item with a regular due date.
Item Id	Identifier of a master file record that is assigned to an individual Item or group of like Items.
Items	Any physical object that is tracked by ATICTS such as Material, Tools, or Equipment.
Job/Machine Id	Identifier of a master file record that describes a job or machine.
Licensing	Designation assigned to an Item and Employee to limit access to the Item.
Return	Check-in an Item from an Employee or entity to a Crib.
Stock number	Stock keeping number assigned to an Item and used as a cross reference for like items.
Time Limit	Maximum number of calendar days an Item may be checked out before it becomes delinquent.
TK	Tool Keeper or Crib Attendant.
Item Limit	Maximum number of Items that can be Issued to an Employee or an entity.
Item Type CO	Consumable Item that is not returned to the crib.
Item Type H	Hand Tool or Bulk Item is a group of identical Items that have a single Item Id.
Item Type U	Unique Item is a single Item with it's own unique Item Id.
Item Type UC	Unique Calibrated is a single Calibrated Item with it's own unique Item Id.
Item Type UK	Unique Kit is a group of Items given one unique Item Id.
Transporter	The Employee responsible for transporting an Item when something is issued to an entity.
User Number	Serial number that is an interchangeable alias for the Item Id.
Vendor Id	Serial number assigned to a vendor, not an Employee.

Chapter 6 Getting Started

This chapter includes basic concepts about computer hardware and software.

Hardware

Hardware refers to the physical equipment you are using. The environment ATICTS uses (in most cases) consists of the following:

Server

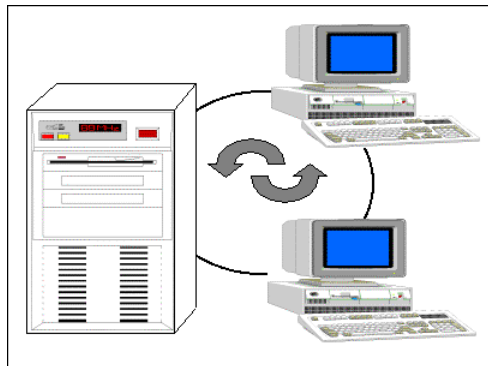
The server (or host) is the computer on which the data is stored. Programs on the server control the flow between the end users. Access to the data (security) is controlled from the server over the network.

Network

The network connects several computers together with the host so they can communicate with each other. In order for the ATICTS application to access the data on the server you must set up a Data Sources (ODBC) definition on your computer.

Computer(s)

The computer is the piece of equipment you will be working with everyday. You have an application that consists of a client program and folder of report records that communicates across the network to the data stored on the server. The client program is used to update and retrieve records that exist on the server.



Input Devices

Keyboard

The user enters information into the application with the use of the keyboard.

Barcode Reader

The barcode reader connects to the computer workstation. The reader transmits information from the bar codes that you scan to the computer workstation. The bar code data displays on the monitor in the same format as if it were entered from the keyboard.

Output Devices

Output devices allow the computer to provide processed information to the user. The following are some examples of output devices:

Printer

The printer provides you with a hardcopy of any reports you might need. Data is sent to the printer from the computer and is displayed on paper.

Monitor

The monitor, or screen, displays information in a readable format for the user.

Operating System

The operating system is the set of instructions that tell your computer how it should behave. Some familiar operating systems are Microsoft Windows, NT, Unix, and MS-DOS.

ATICTS is a 32-bit software application and runs under the Microsoft Windows 95, Windows 98, Windows , Windows NT, IBM AIX, HPUX, LINUX, and SCO UNIX operating systems.

When working in Windows, your main work area is the desktop. You can move items around the desktop, add new ones, and remove those you do not need.

After you start ATICTS , it runs in an application window on the desktop. You can reduce any open application window to an application icon. An application icon is a small picture representing an application. By reducing application windows to icons, you can free space on your desktop without quitting the applications.

These icons appear on the status bar located at the bottom of your screen. Selecting an icon with your mouse will restore the application on your screen.

Having more than one application window running at the same time, whether minimized or maximized, allows you to work on one or more functions simultaneously. This is important to remember, as you'll take advantage of this feature when using ATICTS.

Starting Your Computer

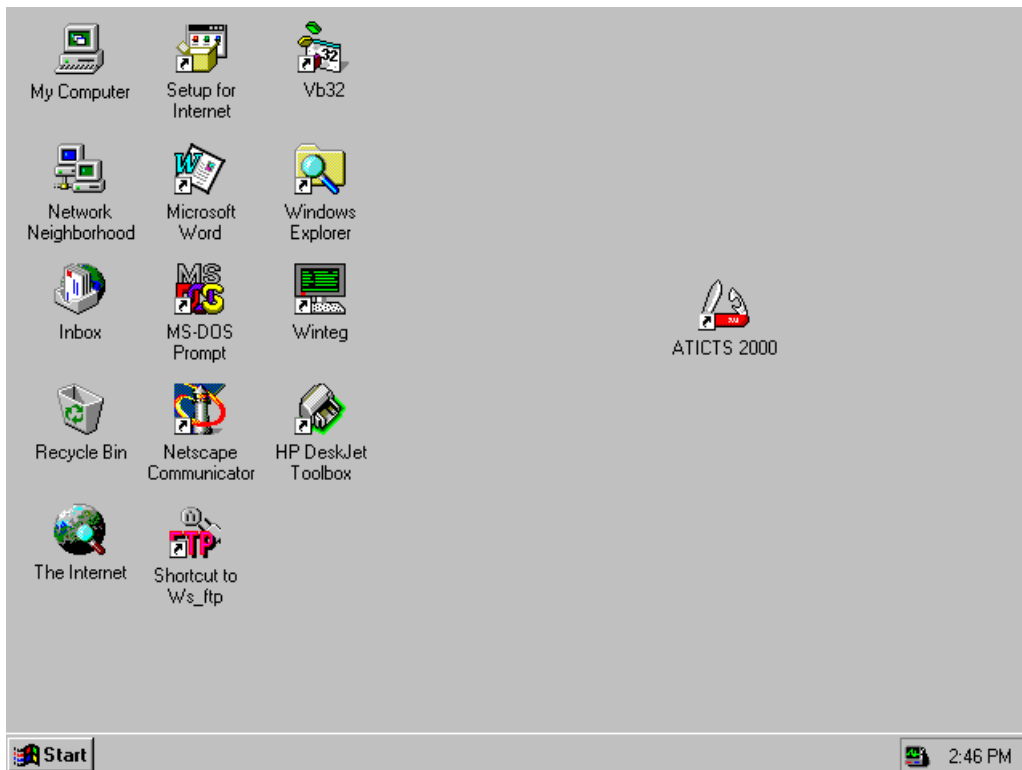
When you start your computer, you will most likely be prompted to enter a User and Password to gain access to the network. This information informs the Network Administrators who has access between the computer and the server. This logon process may require a different set of Identifications and Passwords than the ATICTS application.

Many networks require that the computers employ a screen saver. When the computer is not in use for several minutes, a screen saver program is initiated and the user must enter a Network Password to re-activate the screen.

Starting ATICTS

On the desktop of your computer display, you should find an icon on the screen labeled ATICTS . This shortcut quickly starts the application when you double click on the icon.

The security of passwords for the ATICTS application is a choice that the system administrators may wish to implement. You will be advised on the requirements for your production environment.



Exercise: Starting ATICTS

1. Use your mouse to double click on the **ATICTS** icon.



TCS000 Establish D3 Connection

User ID: user-id

User Password: [Empty]

Crib Account: crib-name

Crib Account Password: [Empty]

Reset User Password

Connect Cancel

2. Identify your **User ID** as **TRAINx** where the **X** represents a number assigned to you by the instructor.

TRAINx

Note: The assignment of your **User ID** can be generic for everyone in your crib, or it may designate the computer location in your crib or it may be a specific identification of yourself. The system administrators will make this determination when you need to access the production data.

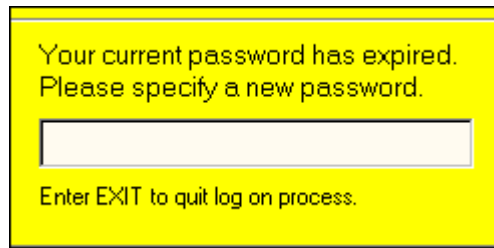
The User ID and the Crib Account will be defaulted in from the ODBC Registry setup on the computer where you are working.

3. Identify your **Crib Account** as **TRAINx** where the **X** represents a number assigned to you by the instructor.

TRAINx

Note: The choice of the **Crib Account** determines the **Crib Location** that is used for inventory transactions. It is generally a generic definition for everyone in your crib or it may be a specific identification of yourself. The system administrators will make this determination when you need to access the production data.

Note: During the logon process you have the option of resetting your **ATICTS User Password**. A System Control File setting may also effect the reset of the User Password. It ties the User Password to the Security Password used to access various programs.

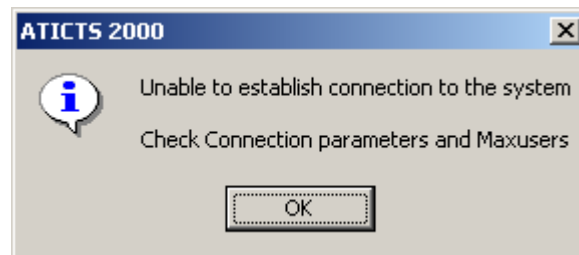


Note: This screen will be displayed if your password has expired or you have requested it to be reset.

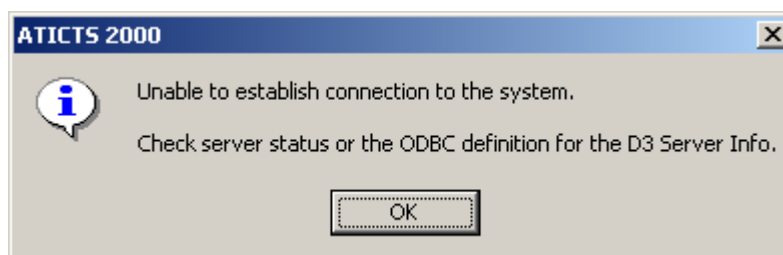
4. Click the **Connect** button to establish a connection to the ATICTS application.

CONNECT

Note: A progress bar displays to indicate the application is opening the necessary files for your needs. You may get a message that a connection was unable to be made. Should this error message appear, you need to call a system administrator and report your problem.



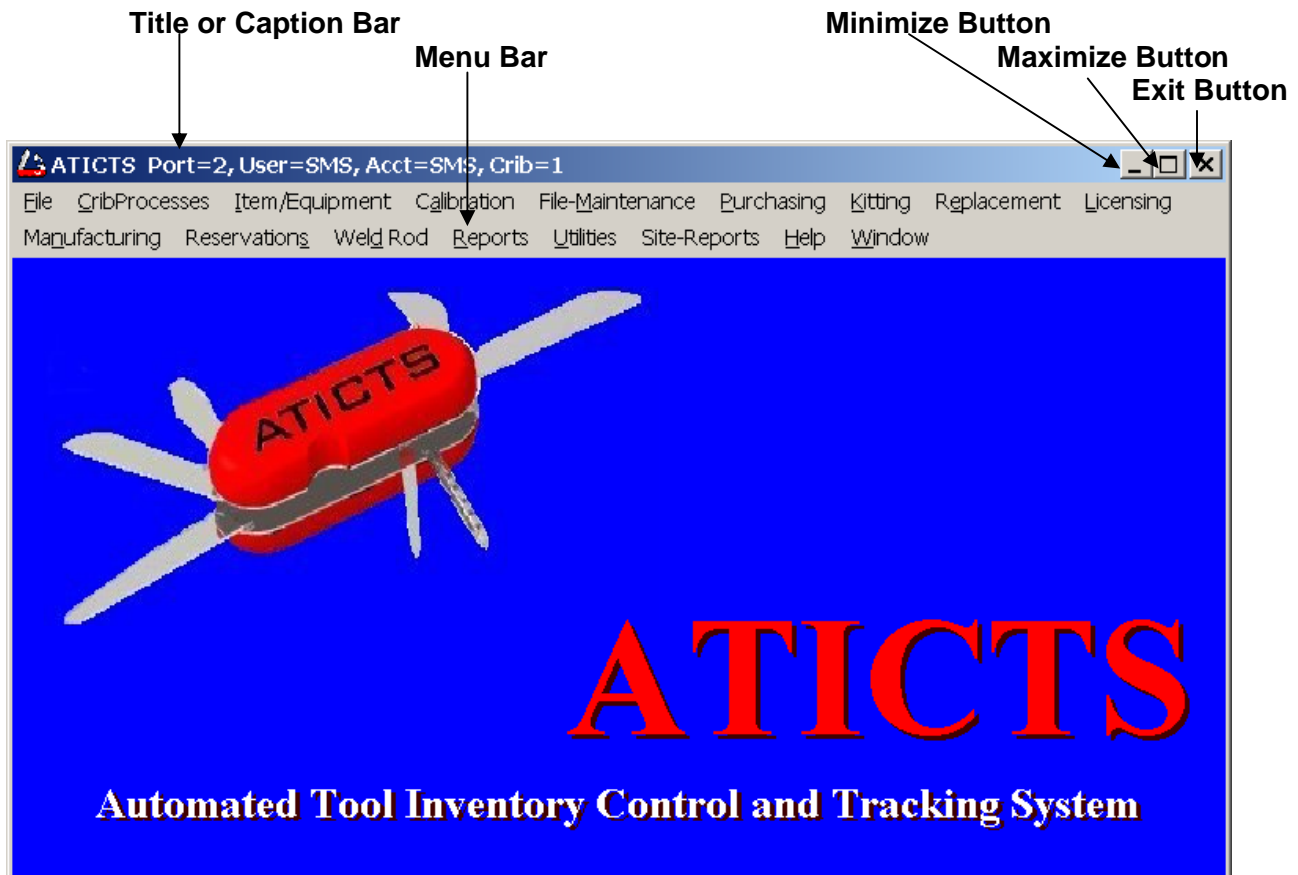
- Check to ensure that you are using the correct User Id, Password (if there is one) or Crib Account.
- If the maximum number of users has been reached, you are not allowed to log into the application. You may have to contact the system administrator to take action and clear ports that have become corrupted.



- This message informs you that the Server may be down. Contact the system administrator to determine if this condition is present.
- The other cause for this message pertains to the ODBC definition for the server that is stored on your computer. This information is located in the Control Panel of your computer.

Parts Of A Window

Most windows have controls and features, such as a menu bar, title bar, minimize, and maximize buttons. They work in the exact same way as other Windows applications. The First screen you see represents the Main Menu for the application.



- The **Title Bar** shows the name of the application or program that you have entered. If more than one window is open, the title bar for the **Active** window (the one in which you are working) is usually a different color or intensity than other title bars.

When you are in the Main Menu window, the Title Bar shows the logon information you entered to connect in the User ID and Crib Account prompts. It also shows the Crib number represented by the Crib Account.

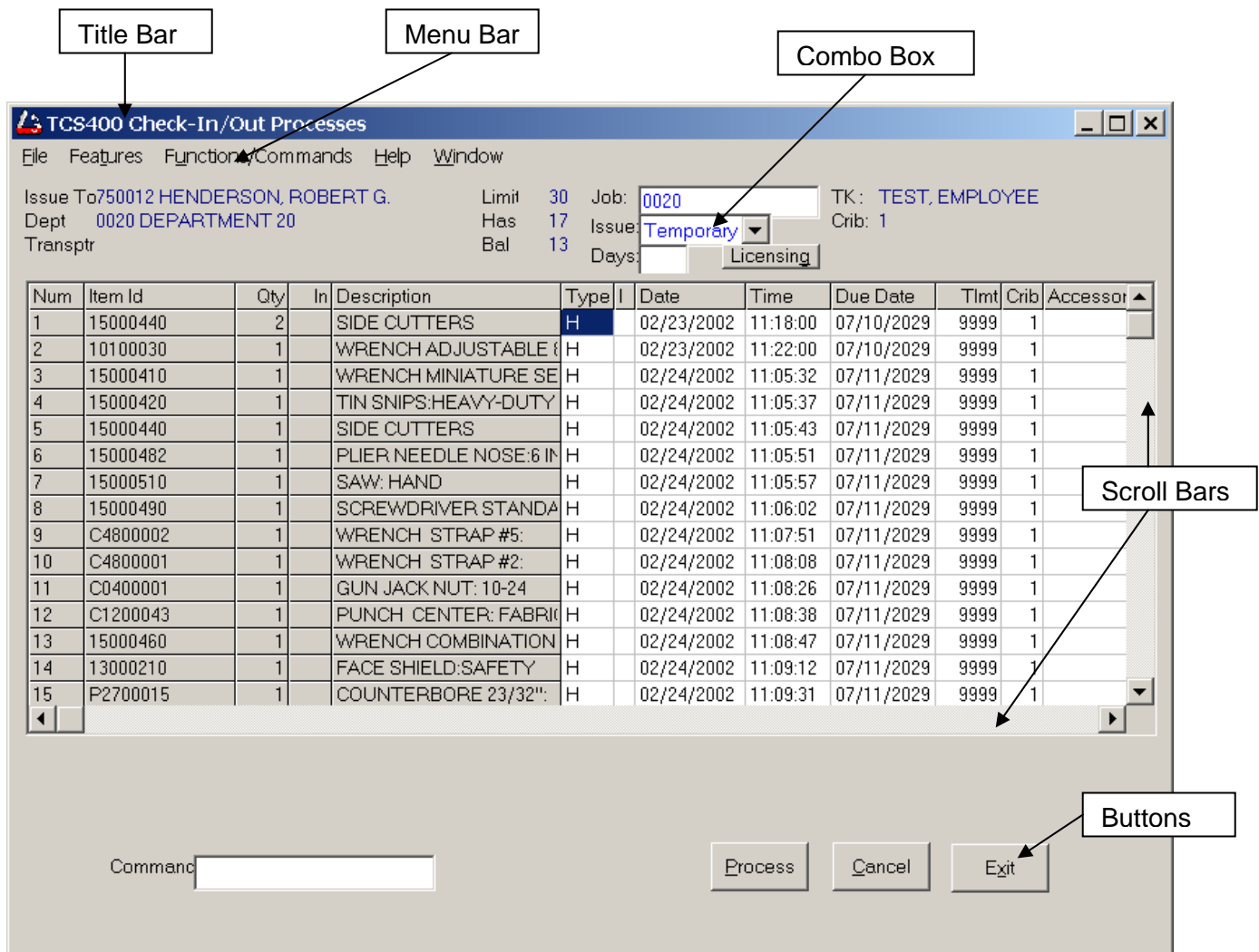
In a specific program, you see the Name of the program and its program number.

- The **Menu Bar** assists your navigation between programs and functions.

When you are in the Main Menu window, the Menu Bar shows a list of sub-menu items that you can use to navigate between programs.

The Menu Bar in a program provides more functions or commands that pertain to the one program that you are in.

- Clicking the **Minimize Button** reduces the window to an icon in your system taskbar. The program is not closed but it is removed from the desktop.
- Clicking the **Maximize Button** with the mouse enlarges the active window so that it fills the entire desktop; clicking it again restores it to the original size.
- Clicking the **Exit Button** in the far right corner of the title bar exits the program or the ATICTS application.



- The **Combo Box** enables you to select from a list of pre-defined choices. Click on the box and a drop down list displays your choices.
- Horizontal and Vertical **Scroll Bars** enable you to move through a document or a list when the entire document or list does not fit in the window or the allotted space. Click the **Scroll Arrows** with the mouse to move through the document or list, one line at a time.

- The **Insertion Point** or **Cursor** shows where you are in a document. It marks the place where text and graphics appear when you begin typing or drawing. (The shape of the insertion point may vary among applications.)
- The **Mouse Pointer** appears if you have a mouse installed. When you move the mouse, the position of the pointer changes on the screen. (The shape of the mouse pointer may vary among applications and even among documents within the same application.)
- You choose a **Command Button** to initiate an action, such as carrying out or canceling a command. Some common command buttons are the **OK**, **Cancel**, and **Process** buttons. Often times they are located at the bottom or right side of the dialogue box.

Chapter 7 Using Online Help

The Help documentation within the ATICTS application is very detailed. From the overview of each process that you find in the Contents section to the topics for each program, there is a lot of information that you can read to better understand the application. Like any Windows application, the contents, index and short cuts allow you to navigate through all the various levels of information.

Using Help

On-line Help is available on the **Main Screen of ATICTS** for all processes. Beginning with **Contents**, scan through this level to become familiar with each process. When you are in a particular program and access Help you are shown the **Help Topic** for the specific program. From within this **Help Topic** you have access to both the **Help Index** and the **Help Contents** for all processes.

A word or title displayed in green and underlined with a solid line is hot (a shortcut). Position the mouse pointer on the green topic and the mouse pointer changes to display the **Help Hand**. Clicking on it will lead to specific Help on that topic. When you jump from a help topic to another, you can always return by clicking on the word **Back** at the top of the Help Topic.

A word or phrase in green and underlined with a dotted line is a pop up that displays a short description about the word or phrase. After you have read it, click anywhere on the screen to make it disappear.

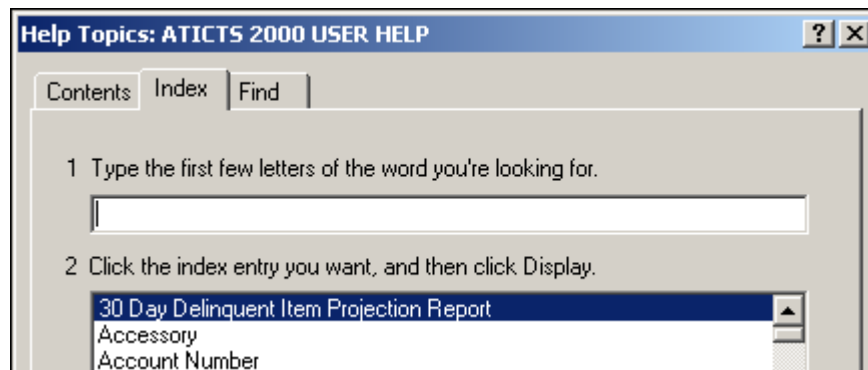
On screens with data entry boxes, position the mouse pointer on a data entry box and press the **F1** key. A popup help topic will appear. After you have read it, click anywhere on the screen to make it disappear.

Exercise: Locate Help For The Current Window

1. Use your mouse to click on the HELP (or Alt-H) menu item from the Main Menu.
2. Select the Index style of Help.

HELP

INDEX



3. At the first prompt type in the word **CHECKO** and the list of help topics stops at the CHECKOUT topic.
4. Click on the **Display** command button.
5. Use the scroll bar to view the text.
6. Click on green text with the solid underline with your mouse.
7. Click on the word BACK at the top of the screen to go back to the Checkout Topic.
8. Click on the green text with the dotted underline to display the pop up help topic.
9. Click anywhere on the screen to close the pop up topic.
10. Click the **X** in the upper right corner of the screen to exit the Help.

CHECKO

DISPLAY

BACK

X

Chapter 8 Establishing Numbering Standards

Use this chapter to provide guidelines for establishing numbering and naming standards.

Before you can start creating your initial database, it's necessary to determine numbering and naming standards.

Requirements For The Item ID

The identifier required by all Items is the Item Id. It is also referred to as the Key to a File and there are certain requirements for this key.

- It may be of variable length, up to fifteen (15) alphanumeric characters.
- Due to program logic processes, an Item Id should not start with the letters T, Q or X
- An Item Id can not contain the asterisk character (*), single or double quotes, or spaces.
- An Item Id should not be identical to an individual word or notation in the Item descriptions or a User Number that are part of the Item Master File.
- The Item Id should not be a key that is used by another Master file such as Category Code, Department, Job, Machine or Vendor or Employee.

An Item ID can be assigned to a single ('unique') Item or to a group of like or identical Items. Whether to consider an item unique and assign it its own ID usually depends on the value, availability, critical nature, etc. The Item ID of a unique tool is equivalent to a serial number and allows the system to track the individual item.

Many organizations already have a numbering system that can easily be assigned to Items in ATICTS. If yours does not, simply assigning sequential numbers is acceptable.

User Number

You may want to use the User Number if you have a numbering system that is longer than fifteen characters. The User Number is a cross reference that can be used to identify and access items. The User Number can be up to 26 alphanumeric characters in length and has a one-on-one relationship with the Item ID. Processes within the system will accept either an Item ID or a User Number to retrieve data. An Item ID is still required even if you use a User Number as a primary identifier.

Item Description

The Item Description may be up to 60 alphanumeric characters in length. On some reports, part of a lengthy description will be truncated. You should organize your Item Descriptions in a consistent and organized manner. Use the following example as a guide.

Correct

Item ID 123	Drill Bit, 1/2"
Item ID 456	Drill Bit, 3/8"
Item ID 789	Drill Bit, 7/16"

Not Correct

Item ID 123	Half inch drill bit
Item ID 456	Drill Bit, 3/8"
Item ID 789	7/16" Drill Bit

Consistent descriptions are important because entering a key word or combination of words found in the description can also access Items. This is useful if you don't know the Item ID or User Number for an Item.

Category Codes

Each item must be assigned a Category Code. Category Codes may be up to thirteen (13) alphanumeric characters long. The Category Code for a Unique Item should be very specific.

Category Code	Category Description	Type	Item ID	Item Description
7651	Drill, 1/2"	U	1234	Drill, 1/2"
		U	1235	Drill, 1/2"
7652	Drill, 3/4"	U	1236	Drill, 3/4"
		U	1237	Drill, 3/4"
7652	Socket, 1/2" Drive	H	4566	1/2" Drive, 3/4"
		H	4567	1/2" Drive, 3/8"
7653	Socket, 1/4" Drive	H	4568	1/4" Drive, 3/4"

Assigning Categories properly is important because a Category cross-reference is maintained for all Items. This provides for fast retrieval of Items. Category Codes are also an efficient method of locating items.

Unique Items are ordered by Category Code if you are using the ATICTS Purchasing Module. Category Codes are also important for calculating Item minimum and maximum values.

Noun Codes

A Noun Code is a four-character code that allows for additional descriptions to be associated with an Item. Noun Codes are optional. Noun Codes are a level above Category Codes. Use the following chart as an example.

Noun Code	Category Code	Category Description	Type	Item ID	Item Description
DRL	7651	Drill, 1/2"	U	1234	Drill, 1/2"
			U	1235	Drill, 1/2" TS
	7652	Drill, 3/4"	U	1236	Drill, 3/4"
			U	1237	Drill, 3/4" TS
SKT	7652	Socket, 1/2" Drive	H	4566	1/2" Drive, 3/4"
			H	4567	1/2" Drive, 3/8"
	7653	Socket, 1/4" Drive	H	4568	1/4" Drive, 3/4"

If used for non-unique items, the noun is simply another descriptive word that can be used to group similar items for reporting purposes, or to enhance and clarify the description.