

Getting Started with CribMaster Advantage

CribMaster User Guide

CRIBMASTER ADVANTAGE USER GUIDE

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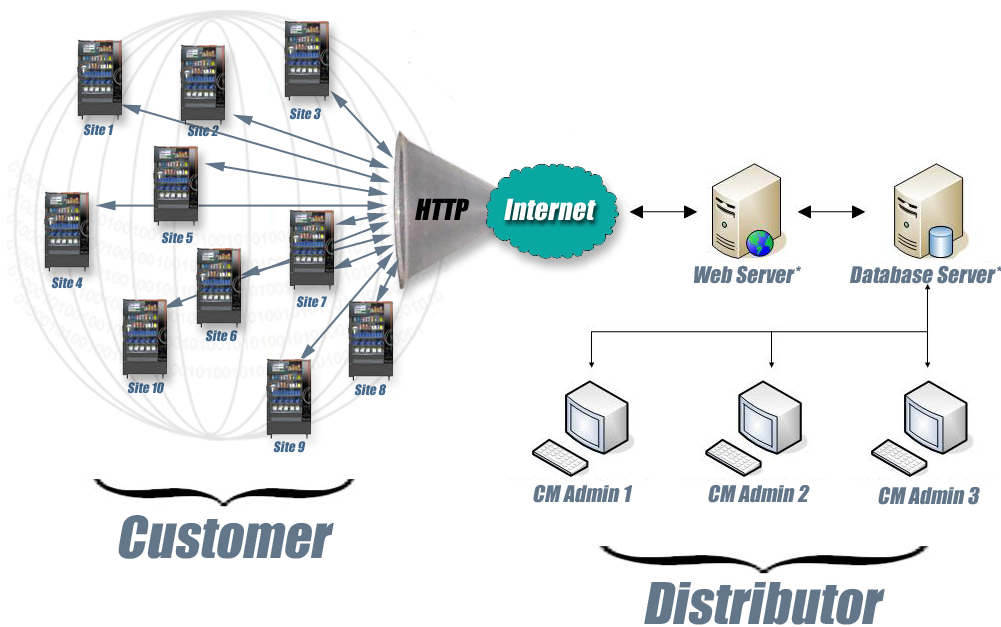
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Chapter 1: Understanding CribMaster Advantage

CribMaster Advantage is a way for distributors to manage inventory for multiple sites and cribs remotely on one database. Each vending unit uses ATR 9 on a “network appliance” for transactions. The transactions are kept on an SD card plugged into the network appliance. Advantage is the ATR program used on the internet appliance to records transactions and keep records. It sends transaction information performed at the ATR over the internet to the database and can be viewed through the CribMaster Client. If the internet at a customer site is down, the vending unit can continue to issue items and keep transaction records until the connection is restored.

Below is a diagram showing how CribMaster Advantage is configured:

CribMaster Advantage Configuration



* The Web Server and Database Server can be the same machine or two different machines.

Customer – On the customer side (ATR), functions include Issuing, Returning, Receiving and Counting.

Distributor – On the distributor side (CribMaster), functions include Purchasing, Reporting and Administration for items, bins and employees.

The data is sent via HTTP or HTTPS to a web server maintained by the distributor. It is then stored on the database server.

NOTE: The web server and database server can be the same machine but do not have to be.

Distributors can manage multiple sites and cribs on one database.

CribMaster Advantage System Requirements

The Network Appliance

The network appliance is a tablet PC used to run the Automated Tool Room (ATR) program in machines produced by WinWare. The ATR resides on an SD card inserted in the network appliance.

Network Appliance Specifications:

Processor	Intel® Atom™ Processor N270 (1.60 GHz)
Memory	1GB
External Storage	16GB Compact Flash Card
Operating System	POS Ready 2009
Microsoft .NET Framework	3.5 SP1

Network Requirements

No major modifications need to be made to a network when installing CribMaster. ATR must be able to connect through a web service to the distributor's database to upload transactions and download updates. This connection is made over the internet using **http** or **https**. The Network Appliance, the PC that runs ATR, connects using a standard Cat5 network cable. A connection to the customer's domain is not required.

ATR Connections

The program connects to the web service at an interval that can be adjusted (The default for this is 60 seconds). If the network is down, ATR will still be able to drive the machine. If it cannot upload transactions it will store them locally until network connectivity is restored.

Firewall Considerations

For networks that are behind a firewall, the IT Administrator at the facility will have to open port 80 to allow outbound traffic.

NOTE: Port 443 (HTTPS) can be used for secure URLs.

Machine Power Requirements

All CribMaster machines have the same power requirements:

U.S. - 120VAC, 60Hz, 3 Amp

Europe - 220-240VAC, 3 Amp

Data Portal Requirements

A web server is required if using a data portal to connect customers to the distributor database.

Processor	Pentium 4, 1Ghz or Better (32 or 64 bit)
Memory	1024MB RAM Minimum on server (2048+ Recommended)
Hard Drive Space	Database sizes range from 100MB to 2.5GB.
Operating System	Windows Server 2003, 2008
IIS	IIS 6 or later
Database	Microsoft SQL (Server 2000 or Later or SQL 2005 Express), MSDE, Oracle 9i or higher
Microsoft .NET Framework	3.5 SP1
Open Port	80 or 443

NOTE: SQL Server 2000 will work for Windows Server 2003. Later operating systems will need SQL Server 2005 or later.

NOTE: SQL Express and MSDE have the following Microsoft limitations:

- It can only use one (1) CPU at a time
- It can only utilize a maximum of one (1) GB of memory
- Job Scheduling is not available
- The maximum database size is four (4) GBs (2 GBs for MSDE)

Considerations for CribMaster Advantage

Crib Numbering

Your customer accounts can grow and add new cribs at any time. For this reason it is recommended that you set aside blocks of Crib numbers for each customer. So even if certain customers add additional cribs, they will still be grouped together.

For example:

Customer A: Cribs 1-100
Customer B: Cribs 101-200
Customer C: Cribs 201-300

Importing Data

Be sure to thoroughly inspect data before it is imported into CribMaster. During the import process, if the system detects that the primary key exists in the database, it will overwrite the existing record.

For example:

You are importing Employee data using the Employee ID as a primary key. One such Employee ID is "1101," assigned to John Doe. In the database is the same Employee ID, "1101;" only this one is assigned to *Jane* Doe. If the import proceeds as normal, Jane's information will be overwritten by John's information.

Employee IDs and Badge Numbers

Every employee ID must be unique in the database. However, there is always the chance that an employee at one customer site has the same Employee ID as an employee at another site. To prevent the original employee from being overwritten, you must make modifications to keep each ID unique. You can do this by adding the Site ID to the Employee ID, or use the Badge Number field to record a unique ID.

Default Site IDs and Crib Access

The "DEFAULT" site ID is used to grant access to all cribs at the vending device to any employee that is assigned to it. Usually, the only way to limit an employee's access is to assign them the appropriate Site ID, which would give them access to only that crib (or cribs with that Site ID). However, you also have the option of giving a user access to multiple cribs using the Crib Access tab in Employee Properties.

IMPORTANT: This tab is only enabled if *Enable separate security privileges for primary and non-primary cribs* and *Also require transaction privileges for CribMaster ATR (vending equipment)* are enabled on the Configuration tab of System Options. However, enabling this option is not recommended as it would mean having to set security access for every employee in the database.

NOTE: Site ID's are not the same as rights. A user still needs to be assigned rights for ATR for functions other than Issuing or Returning.

On the Crib Access tab, you can assign employees to individual cribs. However, it is important to remember that the system will give more weight to cribs selected on the Crib Access tab than to a user's Site ID. So even a user with a site ID of "DEFAULT" is limited to only checked cribs on the Crib Access tab (if Enable separate security privileges for primary and non-primary cribs is enabled).

Customer-Specific Item Information

Because the same item may be used at multiple customers, it can be difficult to add customer-specific information. However, CribMaster features a Bin Comment field that can be used to add information specific to that bin. ATR also features an "alternate description" field that, while often used for foreign language item descriptions, can be used to add customer-specific information. This is set on the Default Options tab: AltDescField. If the field is left blank, no Alternate Description Column will display. If a valid INVENTORY (Item) Custom Field Name is entered, it will display on the Issue Mode, Return Mode, Transaction Summary and Transaction History Screens. (Default = Blank)

Issue Price

There are two places to specify the Issue Price: **Price** on the Item Information tab of Item Properties and **Override Issue Price** on the Bin Information tab of Bin Properties.

If you set the Price in Item Properties, that price will be universal for any machine that vends that item. If you set an Override Issue Price in Bin Properties, that price will be used instead of the price specified in Item Properties and will apply only to that bin.

Item Cost

Item cost is set on the Suppliers Tab in Item Properties and is not site-specific. More about this is explained in a later chapter.

Reports

Customized customer-specific reports may need to be created to include information for that particular customer. For example, if a customer needs a report to display customer item numbers, which are entered in the Bin Comment field, a custom report may have to be generated for it.

Chapter 2: Installing the Data Portal

CribMaster is an application built on the .NET platform. It can be run as an enterprise or stand-alone application. The system is “n-tiered,” meaning that it can be implemented in a variety of ways resulting in one of a few possible tier configurations.

Connection Methods

There are two types of connection methods: Local and Remote.

Local

A local connection can be used by the distributor to connect to the CribMaster database within the network.

ADO Connection – This is the most common database connection and is similar to the ODBC connection used in previous versions of CribMaster.

Remote

NOTE: All ATR programs require a Remote Data Portal connection when used with Advantage.

Web Service Host – With this method, CribMaster connects to the database through a web service hosted in IIS on a web server.

.NET Remoting Host – With this method, the connection is made through a series of channeled proxies managed by the .NET Remoting runtime, which resides on the application server. You can host a .NET remoting application in a custom windows service, forms application or console application; however, WinWare only supports hosting the remoting data portal via IIS.

WCF Host – Windows Communication Foundation, or WCF, is a way to run a server application as a service on any PC. WCF brings the best of .NET remoting and Web Services together. This means that you can host a WCF server in a windows service, a console application, a forms application or in IIS. WinWare supports hosting within IIS.

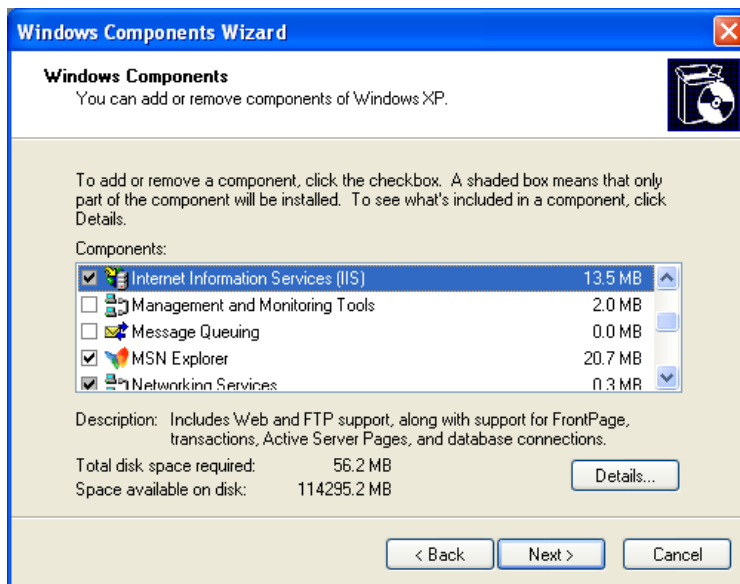
Installing Internet Information Services

Internet Information Services (IIS) are a set of services used to run a web server. A web service running on IIS is needed for CribMaster Advantage. Some of the ways that a CribMaster client connects to the database require IIS to be running on the server that handles internet traffic to and from your database.

Installing Internet Information Services in Windows XP

To install IIS in Windows XP, follow the steps below:

1. Click **Start > Control Panel**. The Control Panel displays.
2. Double-Click **Add or Remove Programs**. The Add or Remove Programs window displays.
3. Click **Add / Remove Windows Components**. The Windows Components dialog box displays.
4. Check **Internet Information Services (IIS)**:



5. Click **Next**.

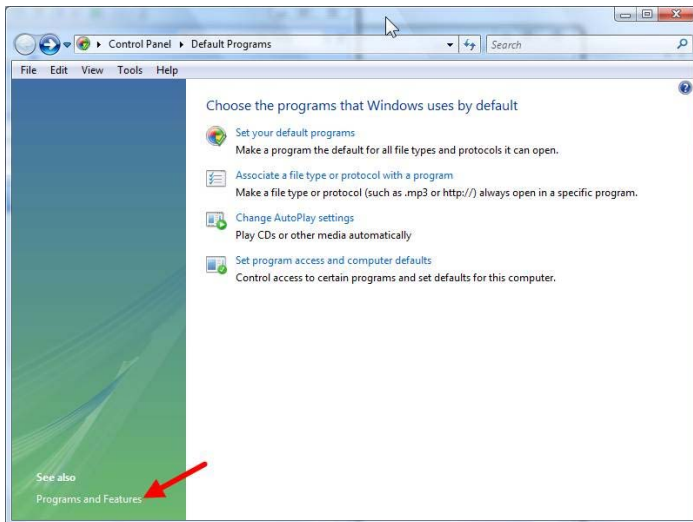
NOTE: The system may prompt for the Windows XP installation CD or image.

Internet Information Services are installed.

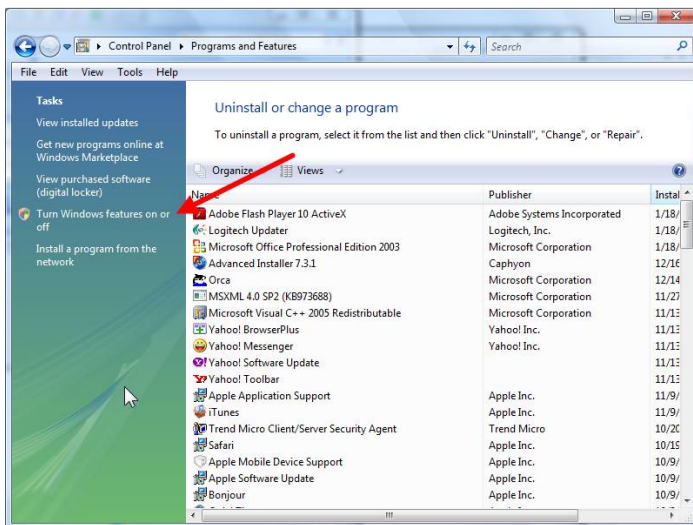
Installing Internet Information Services in Windows Vista / Windows 7

A web service running on IIS is needed for CribMaster Advantage. Installing IIS in Windows Vista is different than in Windows XP. To install IIS in Vista, following the steps below:

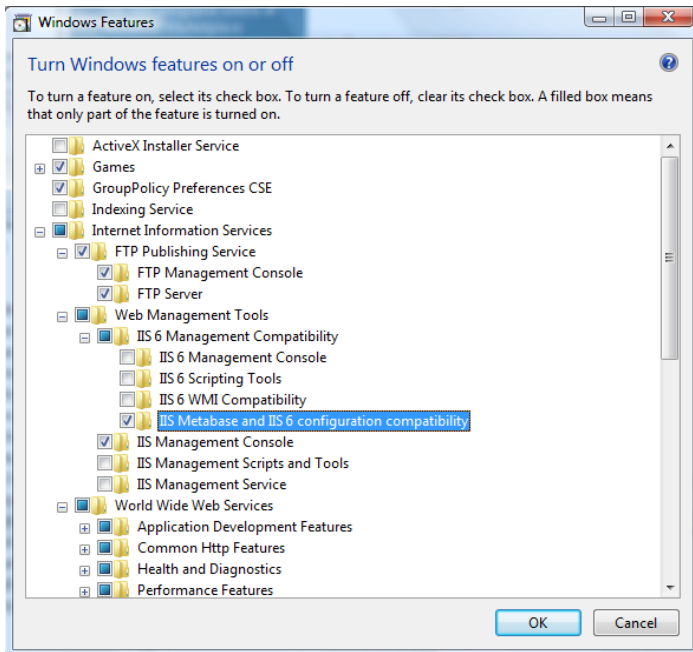
1. Click **Start > Default Programs**.
2. Click **Programs and Features** on the bottom left panel:



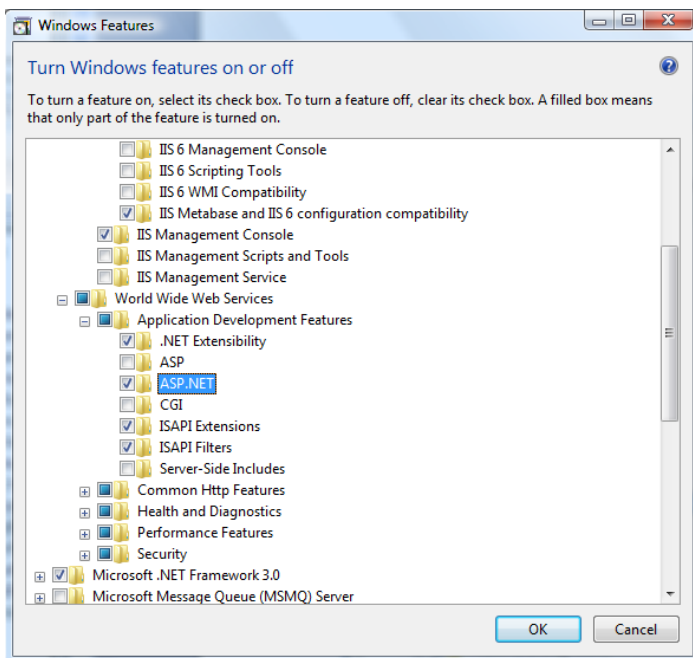
3. Click **Turn Windows Features on or off**:



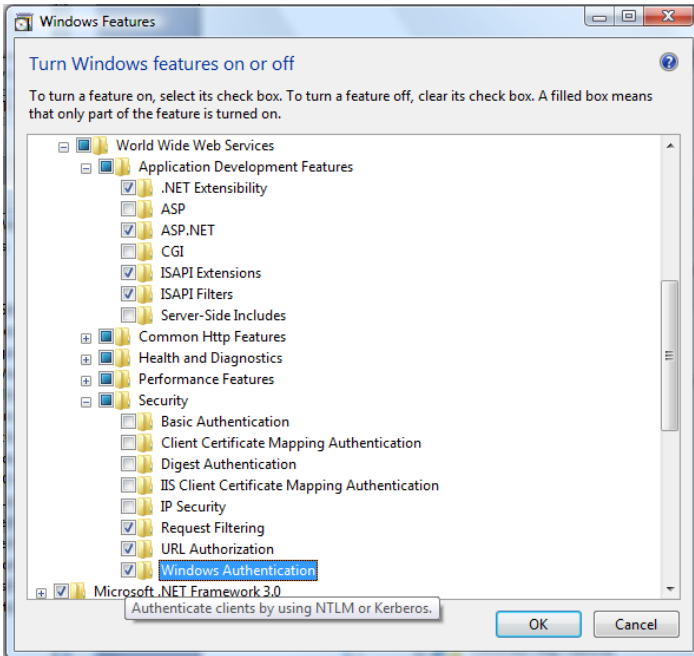
4. Under *Internet Information Services > Web Management Tools*, select **IIS Management Console**.
5. Under *Internet Information Services > Web Management Tools > IIS 6 Management Compatibility*, select **IIS Metabase and IIS 6 configuration compatibility**:



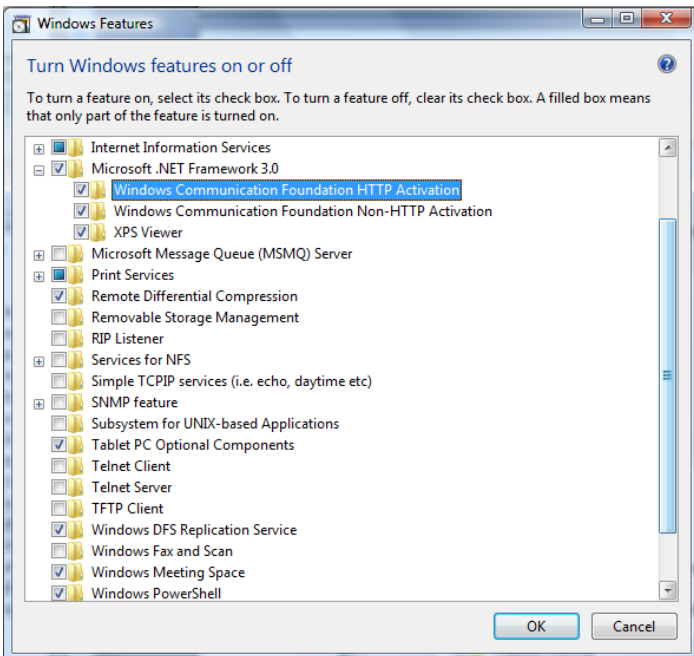
6. Under *Internet Information Services > World Wide Web Services > Application Development Features*, select **ASP.NET**:



7. Under *Internet Information Services > World Wide Web Services > Security*, select **Windows Authentication**:



8. Under *Microsoft .NET Framework 3.5*, select **Windows Communication Foundation HTTP Activation**:



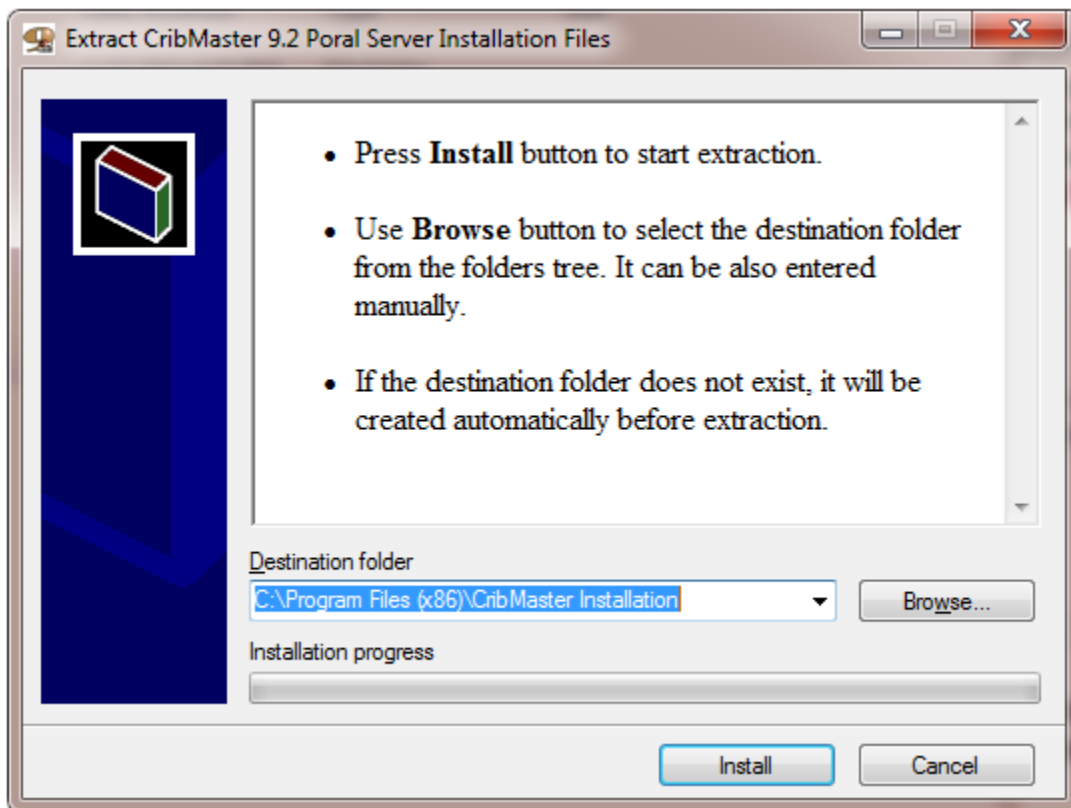
9. Click **OK**.

Installing the CribMaster Portal Server

This chapter outlines the steps necessary to install the data portal. The portal server install program is used for installing the web service host, the .NET Remote host, the WCF host and AdvantageWeb.

NOTE: The CribMaster Portal Server install program can be downloaded from the following address:
<ftp://ecribmaster.com/Pub/Software/CribMaster/CM9.2/Portal%20Server%20Installer/CMPortalSvr-9.2.030303.00-Setup.exe>

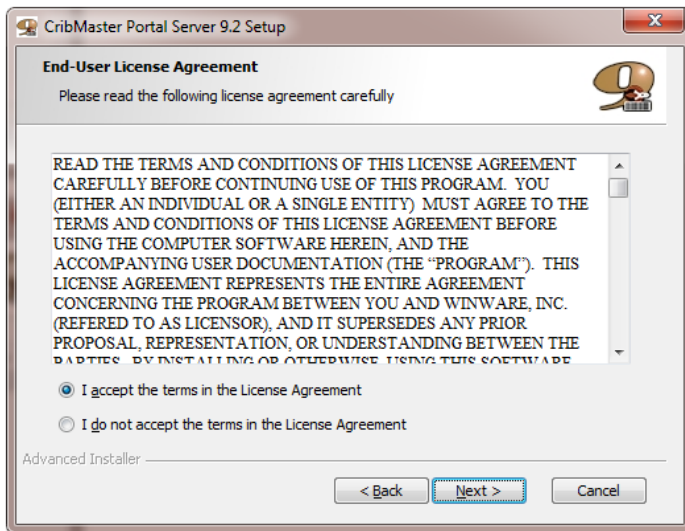
1. Download the CribMaster Portal Server install program to your desktop.
2. Double-click the downloaded Portal Server installer. The self-extracting executable will prompt you for a location to extract the CribMaster Portal Server installation files to:



3. Enter or select a **Destination folder**.
4. Click **Install**. The files are extracted into the selected destination folder and the Portal Server setup will automatically launch.

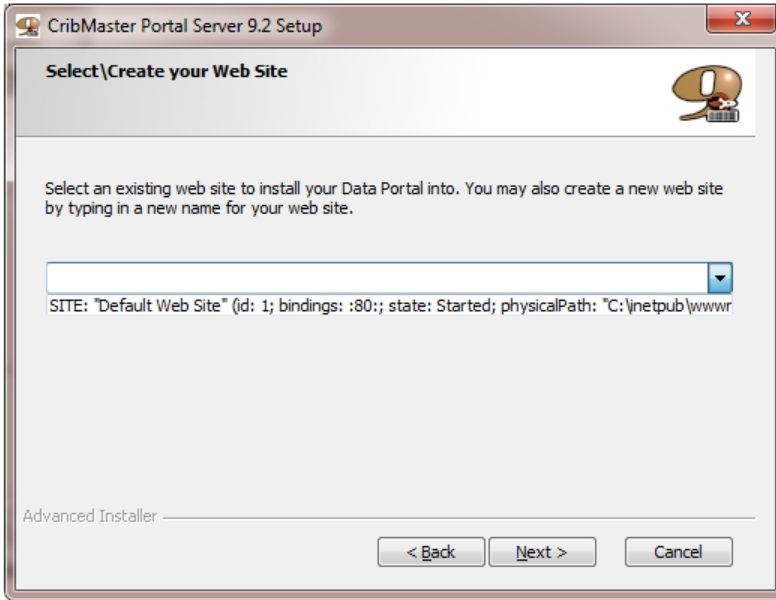


5. Click **Next**.

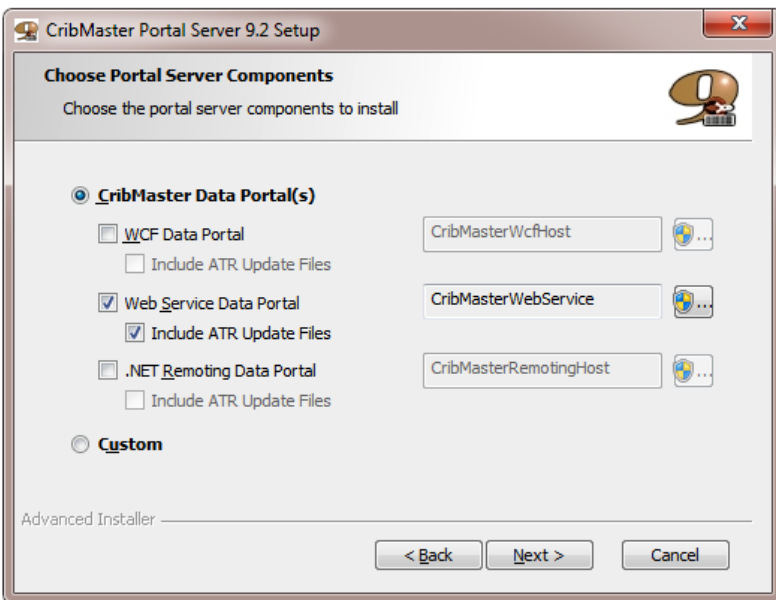



6. Select **I accept the terms in the license agreement**.

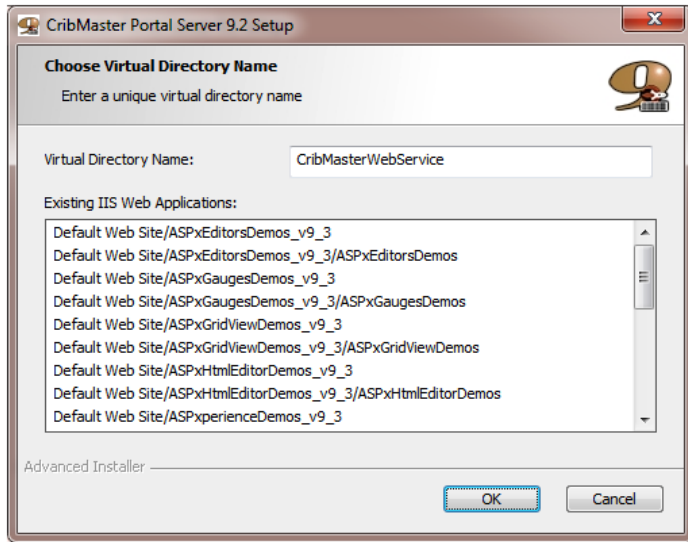
7. Click **Next**. The *Select\Create your Web Site* dialog box displays:



8. Do one of the following:
 - If you have an existing web site you want to use, select it from the drop-down.
 - Select the Default Web Site from the drop-down.
9. Click **Next**. The *Choose Portal Server Components* dialog box displays:



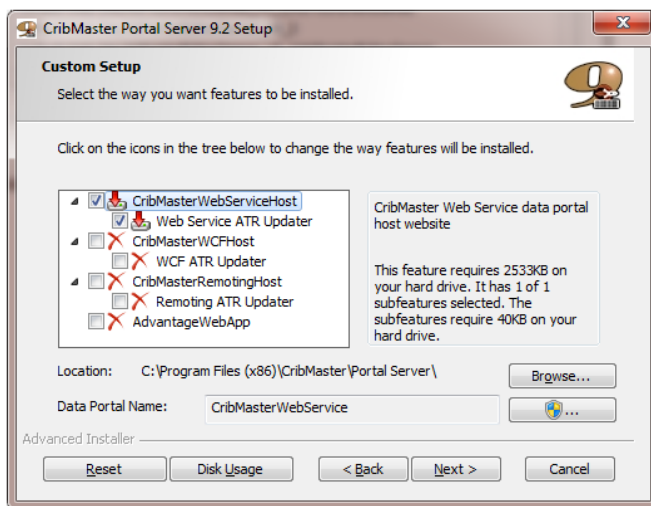
TIP: You can change the name of the portal if necessary. Click the ellipses () next the default name. A list of existing virtual directories for the web site you selected in step 6 displays:



Using the list to avoid entering a duplicate name, enter the **Data Portal Name** you want to use in the blank. Click **OK** to return to the Portal Server Type dialog box.

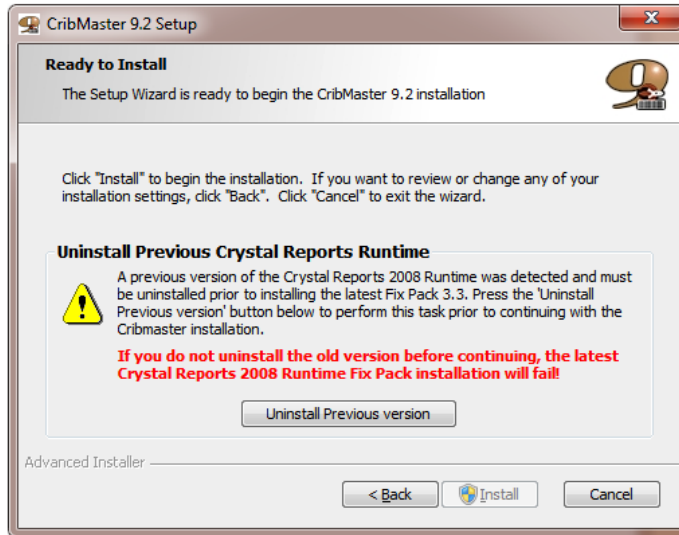
10. Select the type of data portal you want to install.
11. Select **Include ATR Update Files**.
12. Click **Next**.

NOTE: If you selected Custom, the following dialog box displays:



Select the components you want to install and click **Next**.

NOTE: If you have a version of the Crystal Reports 2008 Runtime earlier than *Fix Pack 3.3* installed, the following dialog box will display instead of the above.



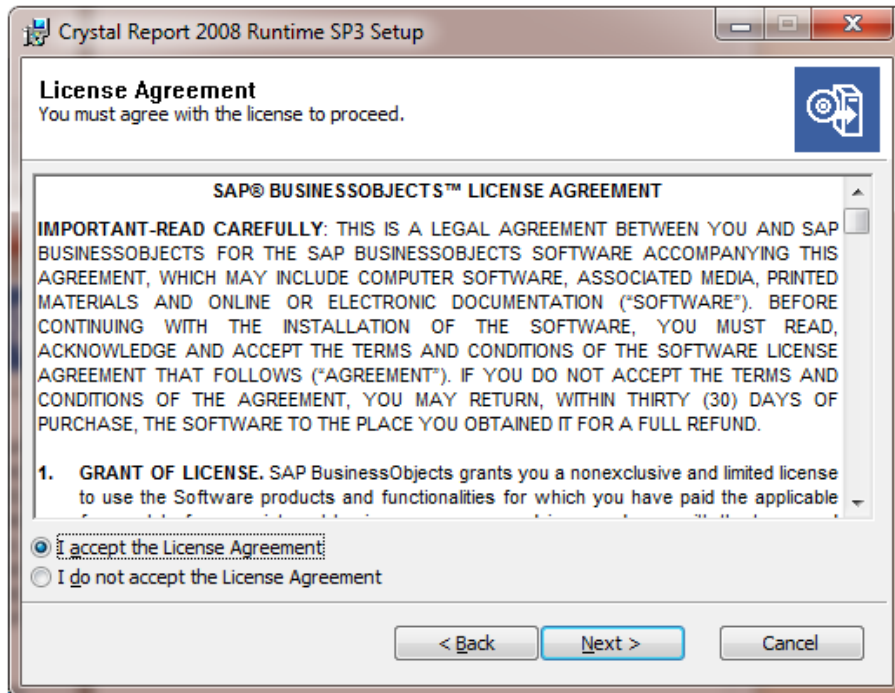
13. Click **Uninstall Previous version** if necessary.

NOTE: This will take a few minutes and progress screens will display onscreen.

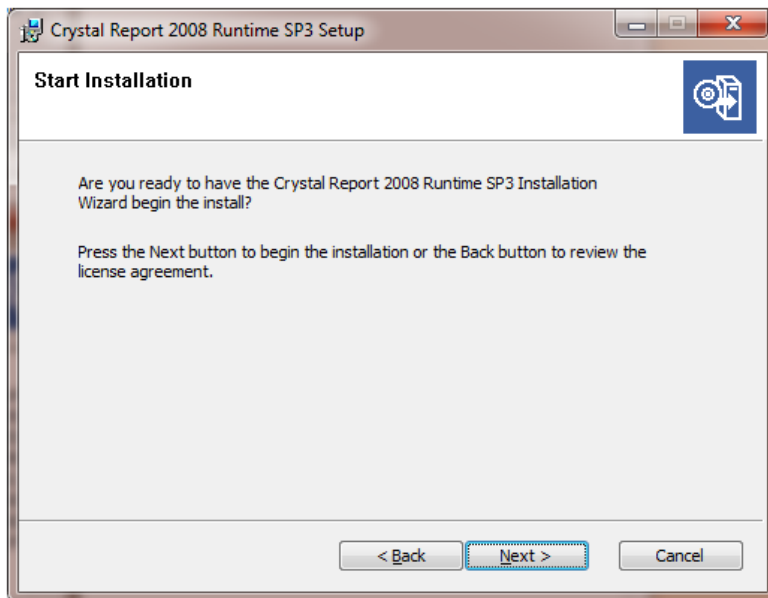
14. Click **Install**.
15. If you do not have the Crystal Reports runtime installed, the install package will install it:



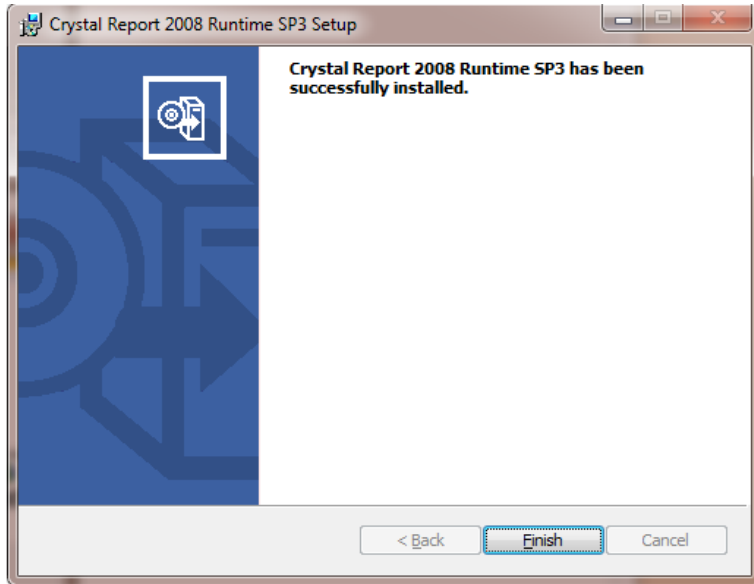
16. Click **Next**.



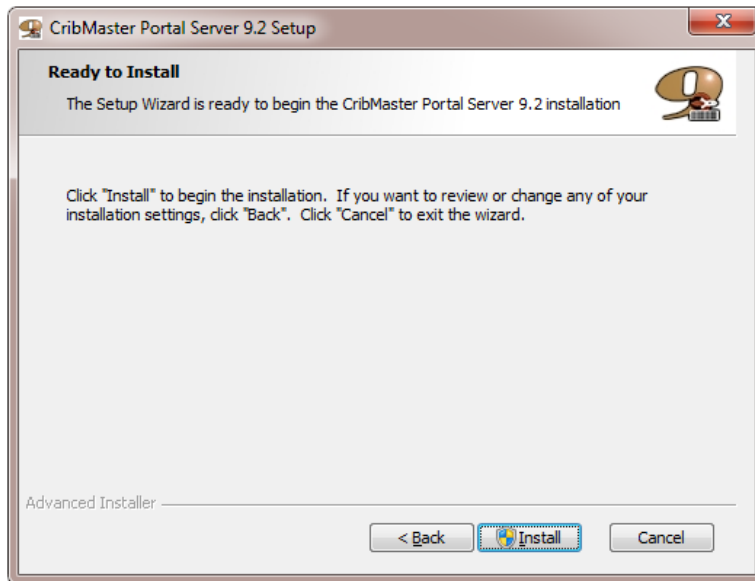
17. Select *I accept the License Agreement*.
18. Click **Next**. The *Start Installation* dialog box displays:



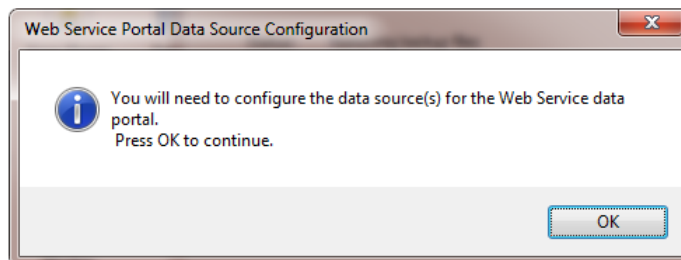
19. Click **Next**.



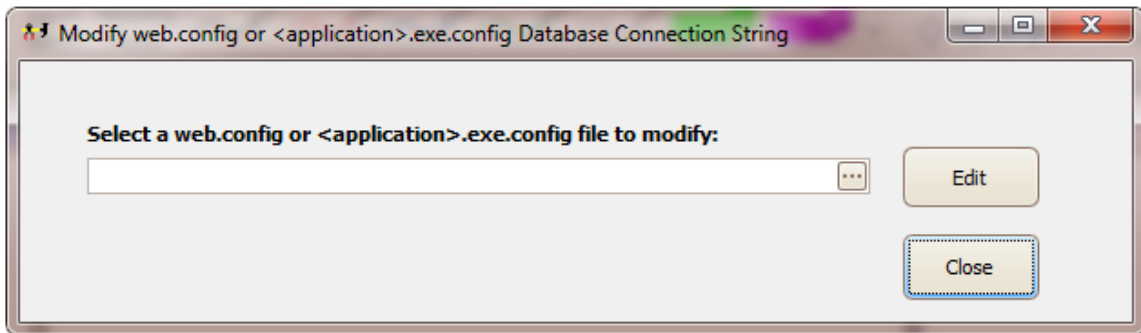
20. Click **Finish**. The CribMaster Installation dialog box displays:



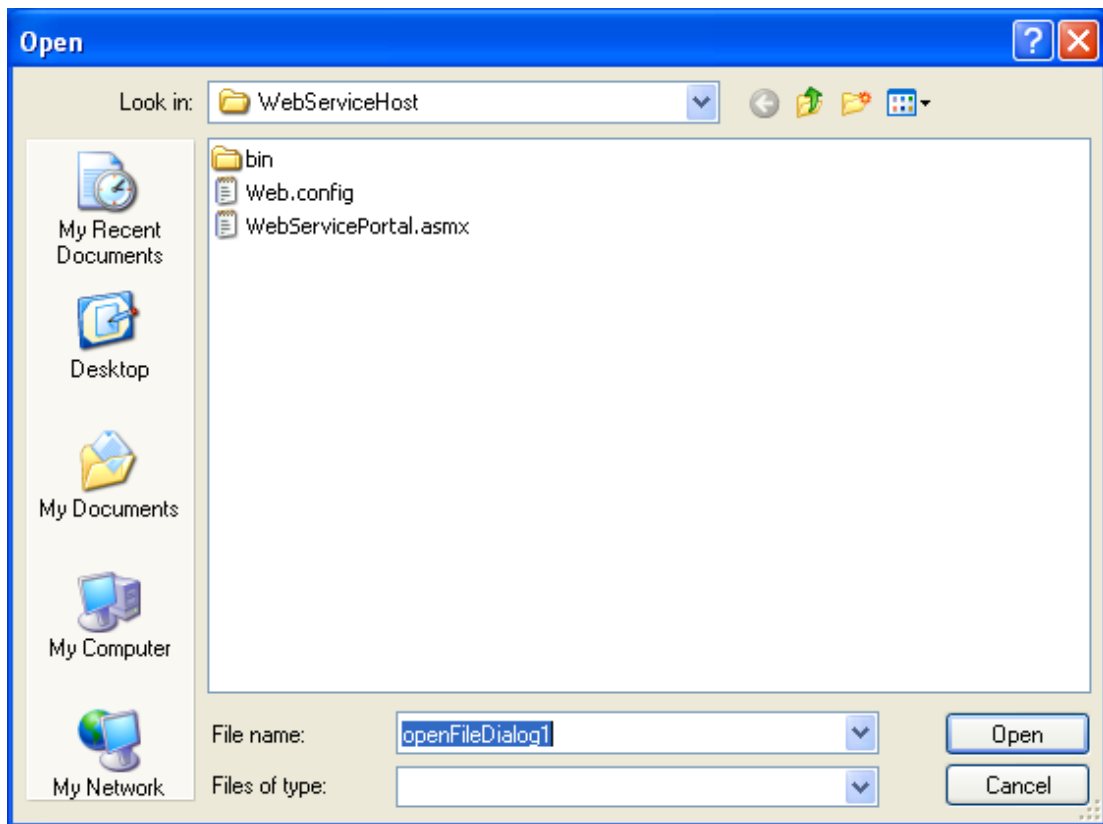
21. Click **Install**. The application installs. The following prompt displays:



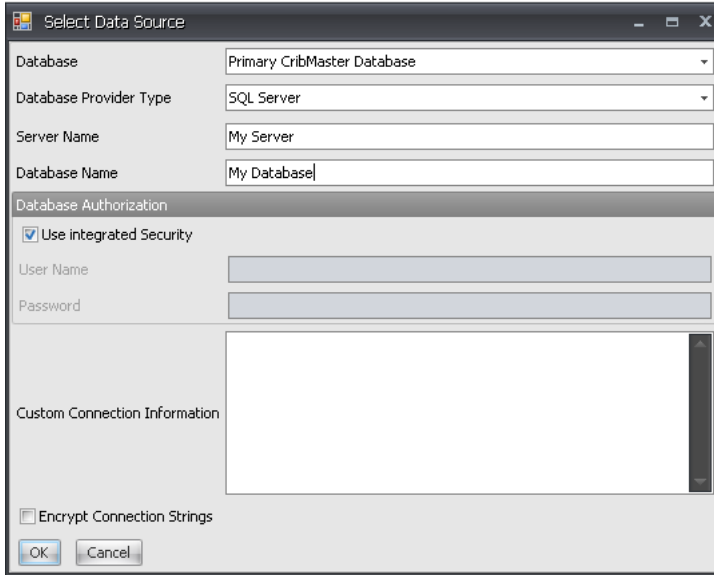
22. Click **OK** to continue. The *Modify web.config Database Connection String* dialog box displays:



23. Click the browse button . The Open dialog box displays:



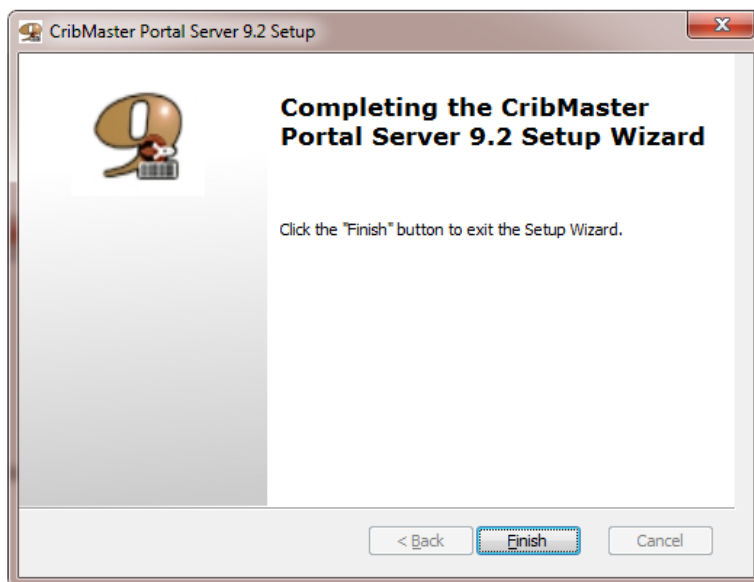
24. Select **Web.config**.
25. Click **Open**. The file is selected:
26. Click **Edit**. The Select Data Source dialog box displays:



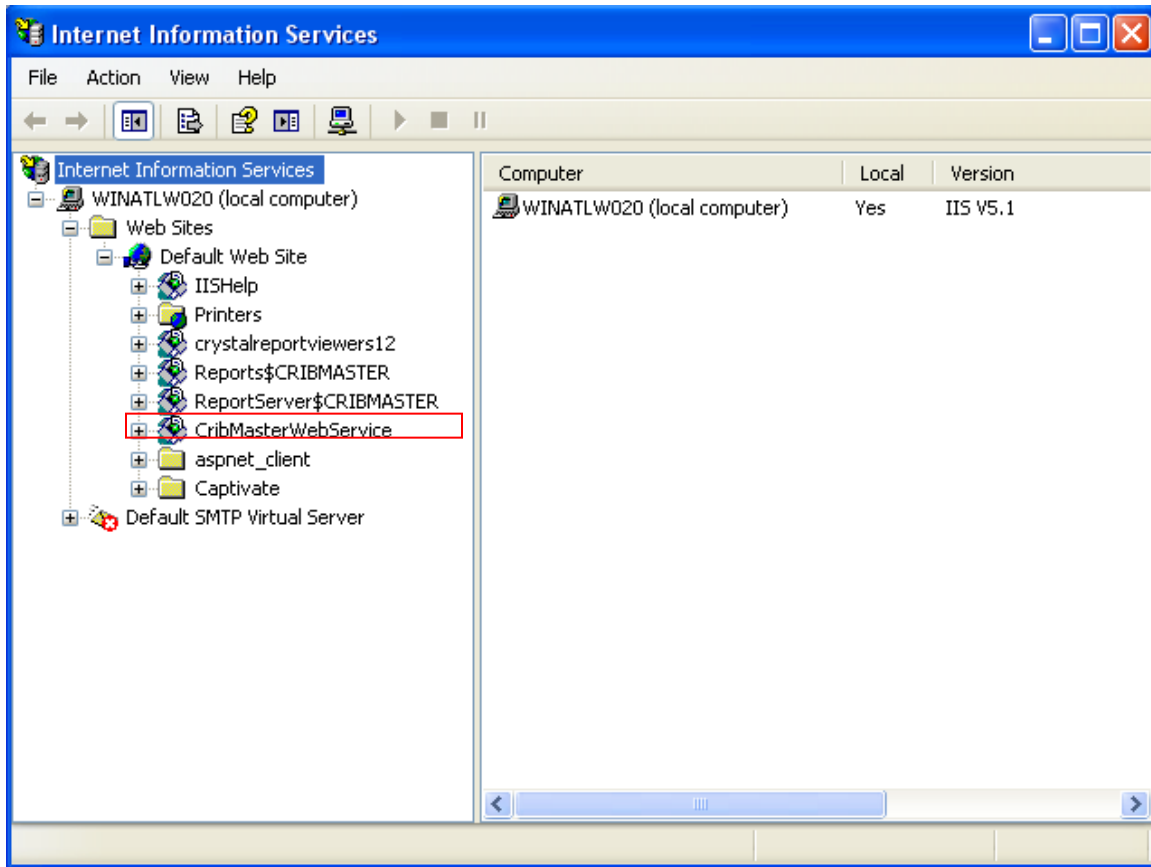
27. Ensure the type of **Database** is *Primary CribMaster Database*.
28. Select your **Database Provider Type**.
29. Enter the **Server Name**.
30. Enter the **Database Name**.

NOTE: If your database requires authentication, uncheck the **Use integrated Security** box and fill in the database user name and password.

31. Click **OK**. The Modify web.config Database Connection String dialog box displays again.
32. Click **Close**. The following dialog box displays:



33. Click **Finish** to close the install window. The Internet Information Services window displays so that you can verify installation:



Using the default settings, the web address for the installed service would look like the following:
http://<server>/CribmasterWebService/WebServicePortal.asmx

Chapter 3: Installing the CribMaster Client

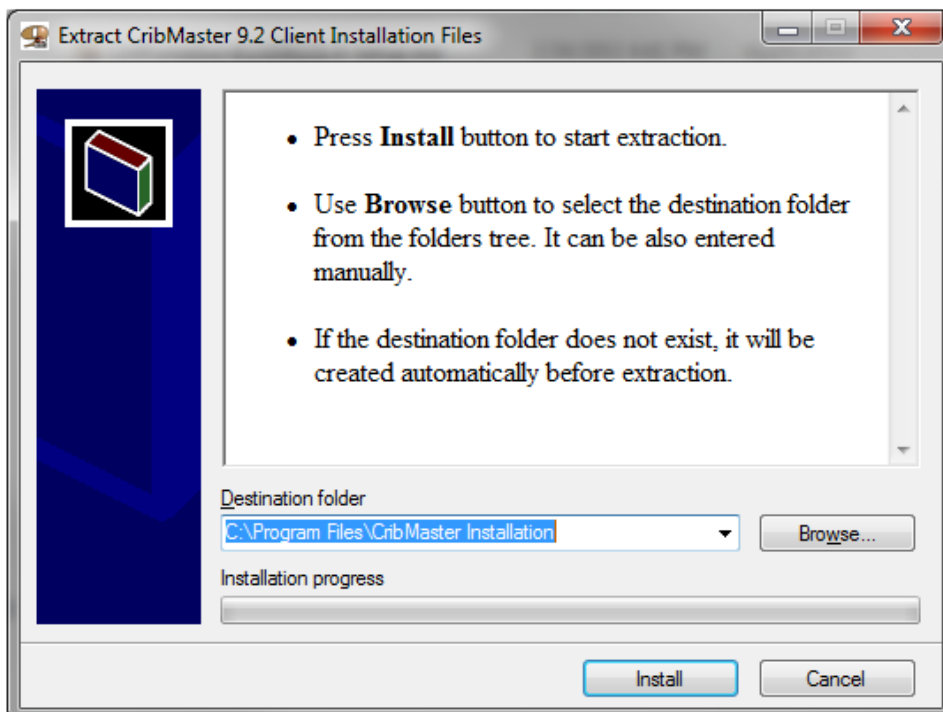
These steps outline installing the actual files necessary to run the CribMaster Client application.

NOTE: The CribMaster client is never installed at a customer site.

IMPORTANT: CribMaster must add entries to the registry to establish a Hardware ID for licensing purposes. Because of this, you must have administrative rights in Windows to properly install CribMaster. In addition, CribMaster must be started at least once by a user with Administrative rights. Once CribMaster is installed and run the first time, it can be run by a standard user.

Downloading and Extracting the Install Files

1. Go to the following FTP Site:
<ftp://ecribmaster.com/Pub/Software/CribMaster/CM9.2/CribMaster%20Installer/CMClient-9.2.030303.00-Setup.exe>
2. Download the latest zip file.
3. Open the downloaded file.

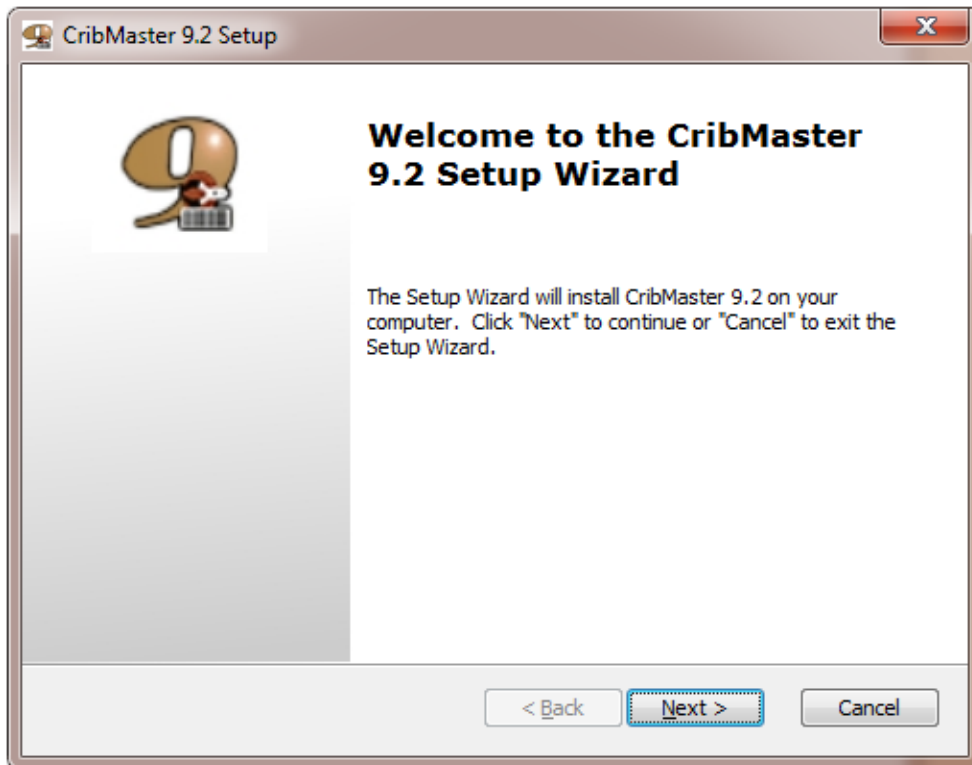


Installing the CribMaster Client

4. Click **Browse**.
5. Navigate to a location to save the installation files.
6. Click **OK**.
7. Click **Install**. The CribMaster Base Installation files are extracted to the destination folder.

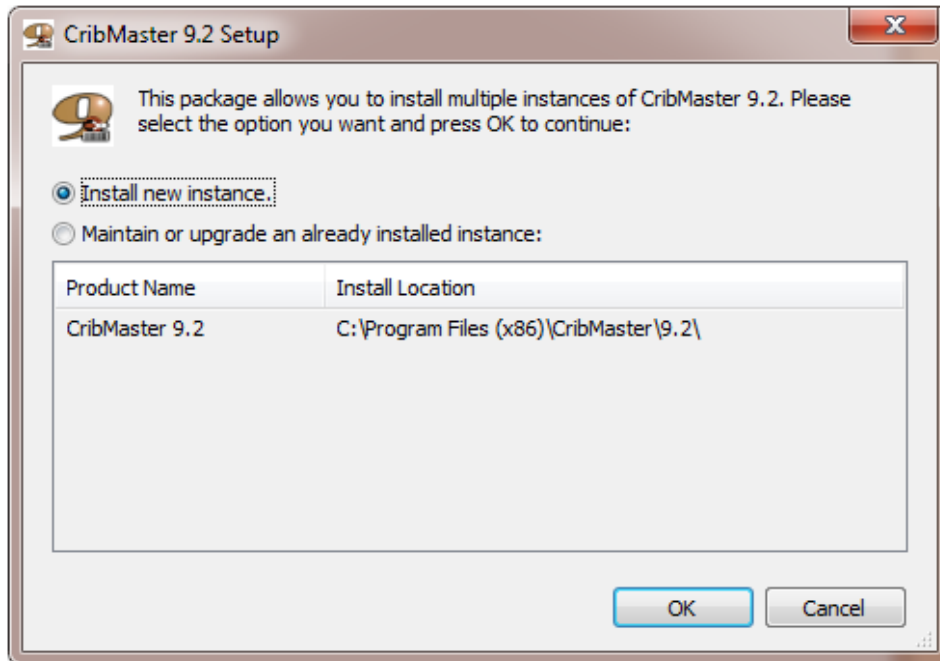
Running the Client Install

1. Double-click the setup file. The following dialog box displays:



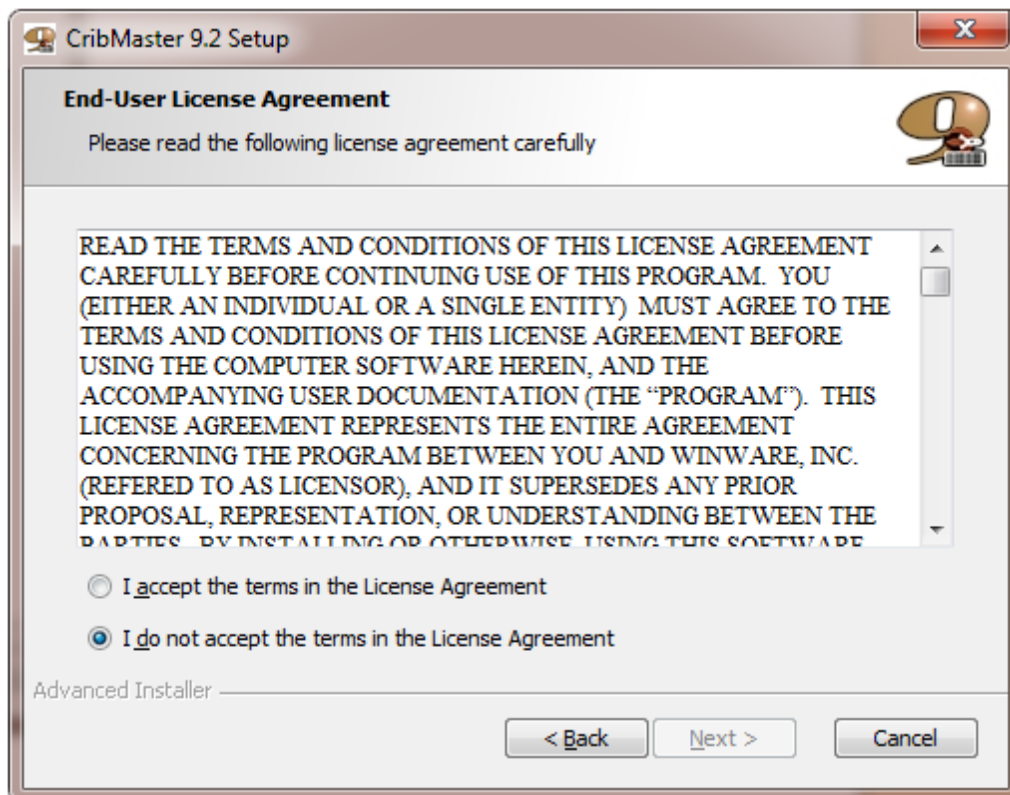
If you have a previous installation of CribMaster 9.1, you will be prompted to either install a new instance or work with one of the previous installations:

Installing the CribMaster Client



NOTE: To perform a clean install, you will have to uninstall the previous installation.

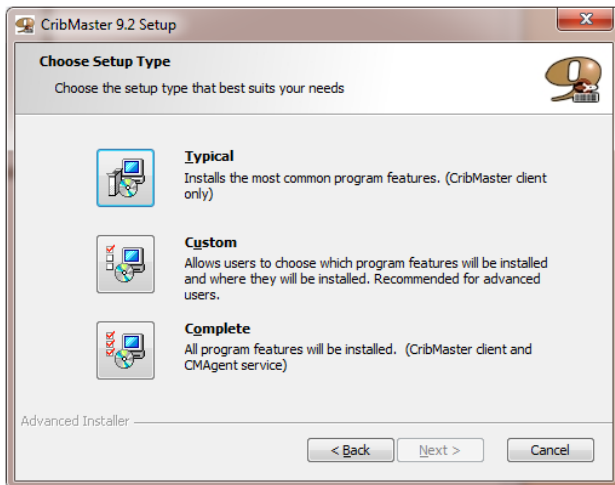
2. Click **OK**. The License Agreement displays:



Installing the CribMaster Client

NOTE: CribMaster requires the Visual C++ 2008 SP1 Redistributable, the Crystal Reports 2008 Runtime and the .NET Framework 3.5 SP1 to run. If these are not already installed, the wizard will install them before installing CribMaster.

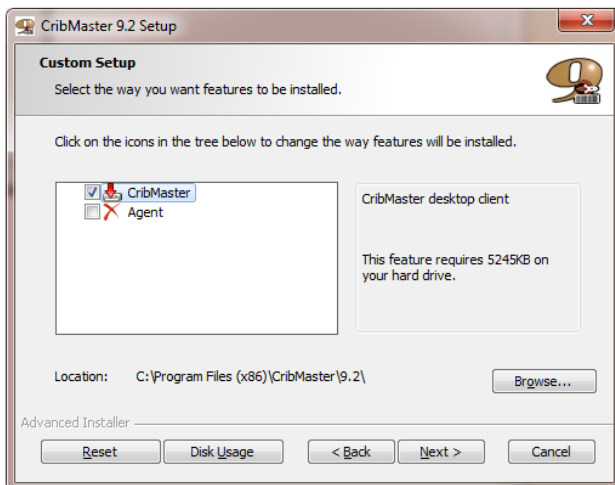
3. Select *I have read and ACCEPT the terms of the License Agreement*.
4. Click **Next**. The *Choose Setup Type* dialog box displays:



5. Select the type of setup you want to perform.

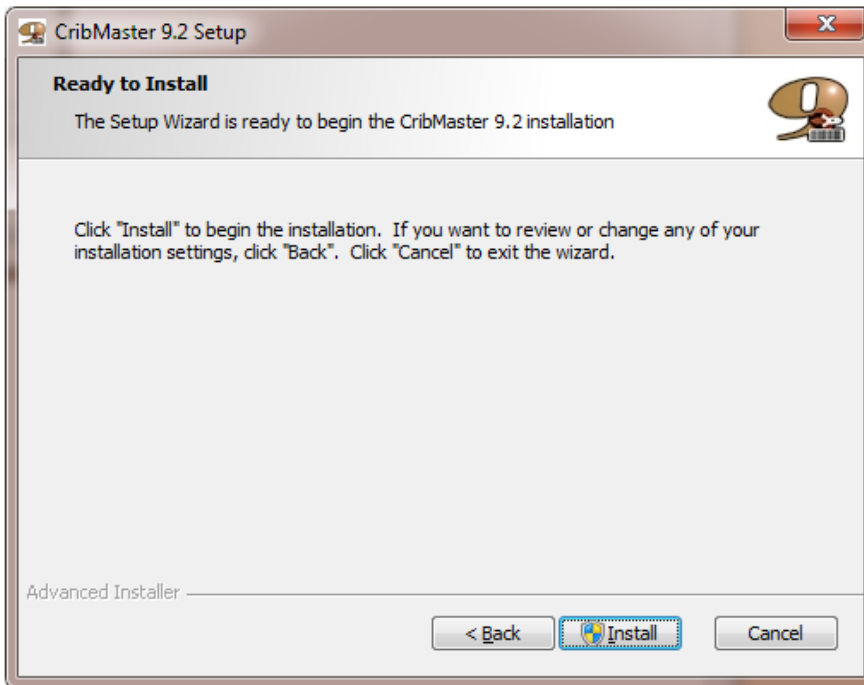
NOTE: You have the option of installing CribMaster Agent with the client. If CribMaster Agent has already been installed for the database on another machine, then install only the client. CribMaster Agent can only be running on one data-base connected machine at a time.

NOTE: If you selected the Custom option, the following dialog box displays:

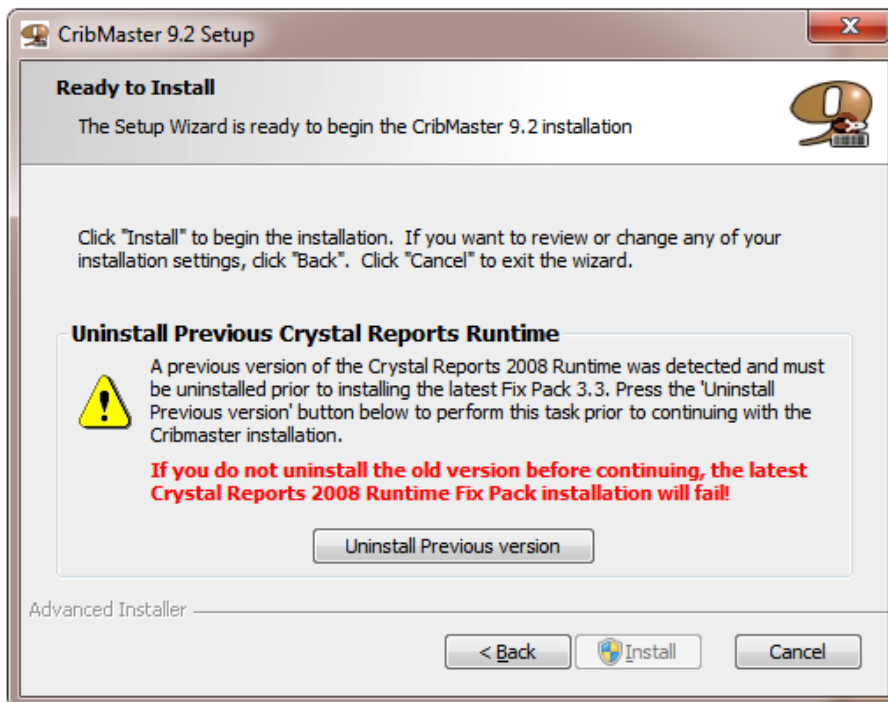


Installing the CribMaster Client

6. Select installation options.
7. Click **Next**. The Ready to Install dialog box displays:

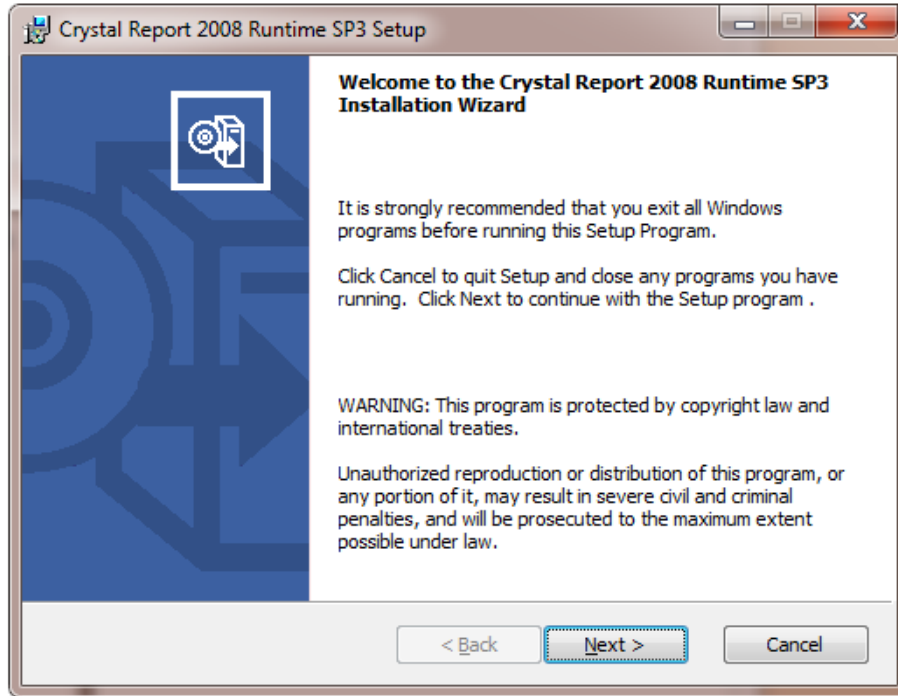


NOTE: If you have a previous version of the Crystal Reports Runtime installed, the following dialog box will display instead of the above.

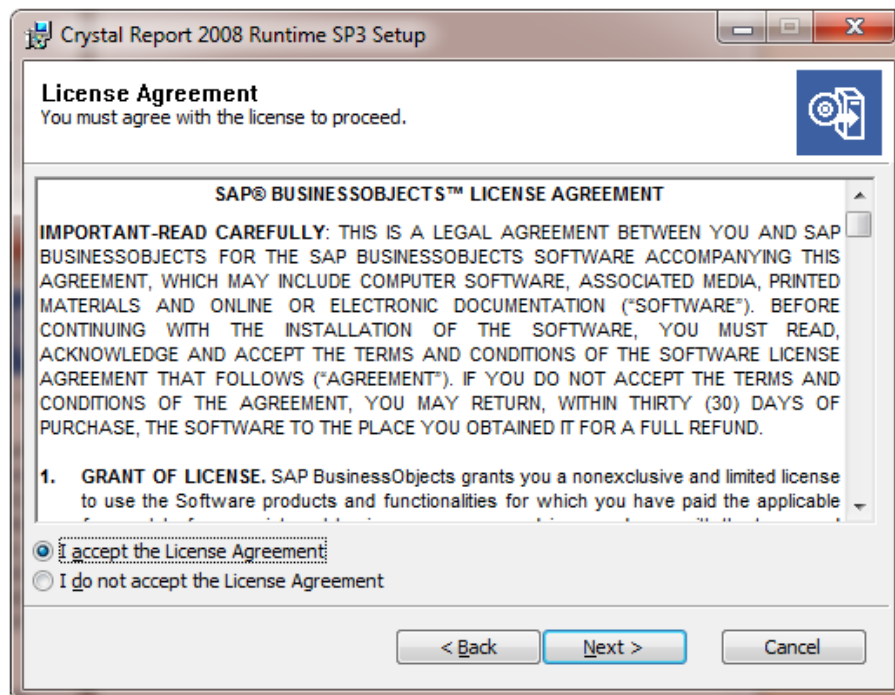


Installing the CribMaster Client

8. Click **Uninstall Previous version** if necessary.
9. Click **Install**.
10. If you do not have the Crystal Reports runtime, or you have a previous version, the wizard will install it:

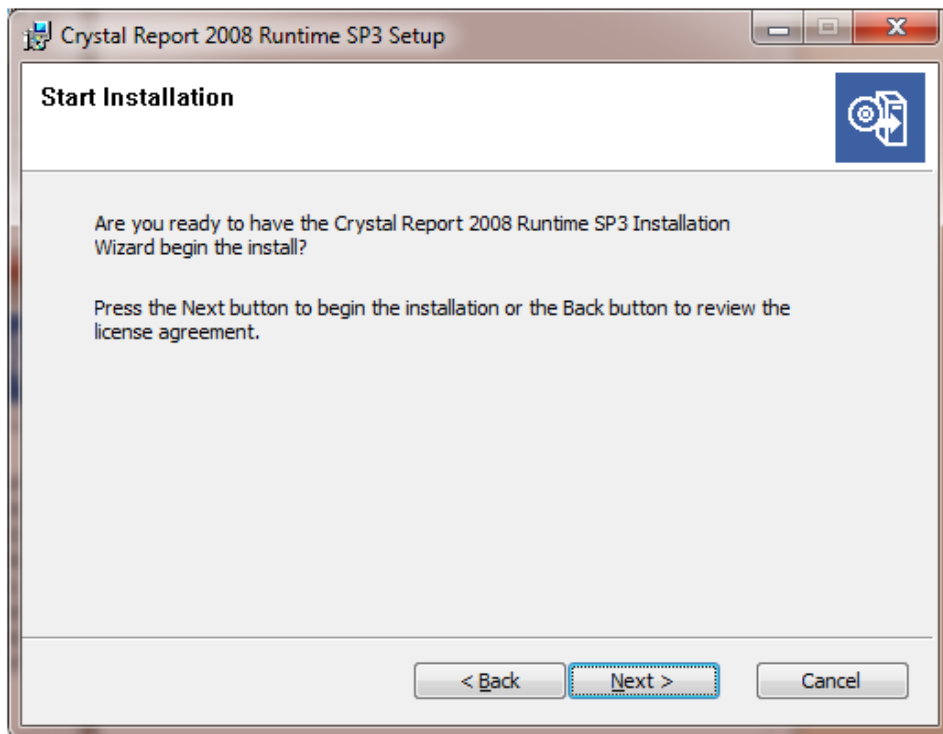


11. Click **Next**.

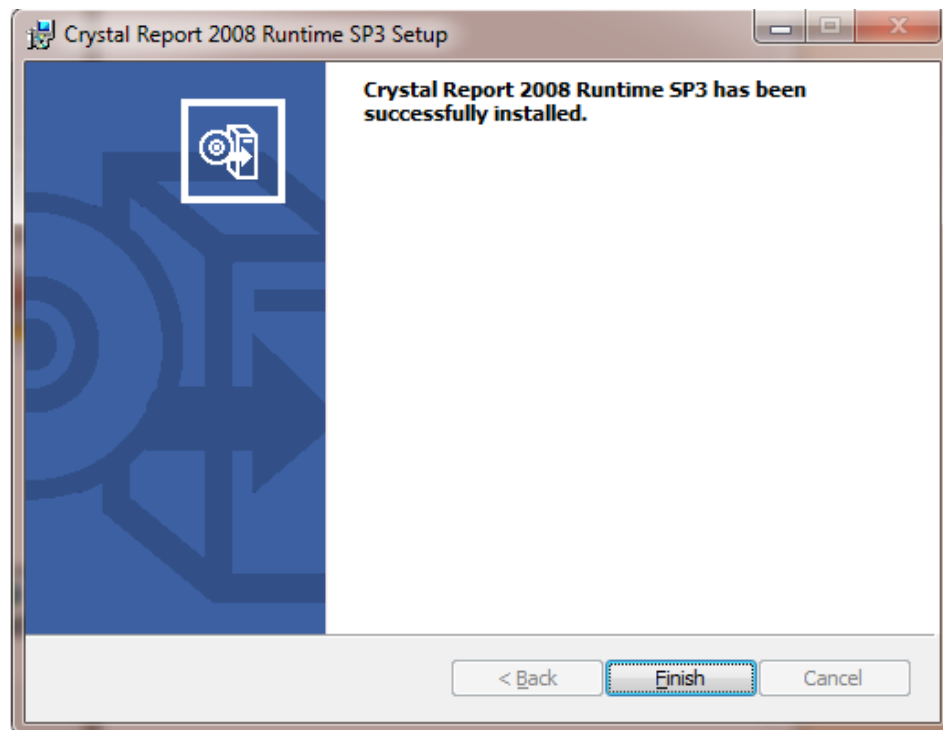


Installing the CribMaster Client

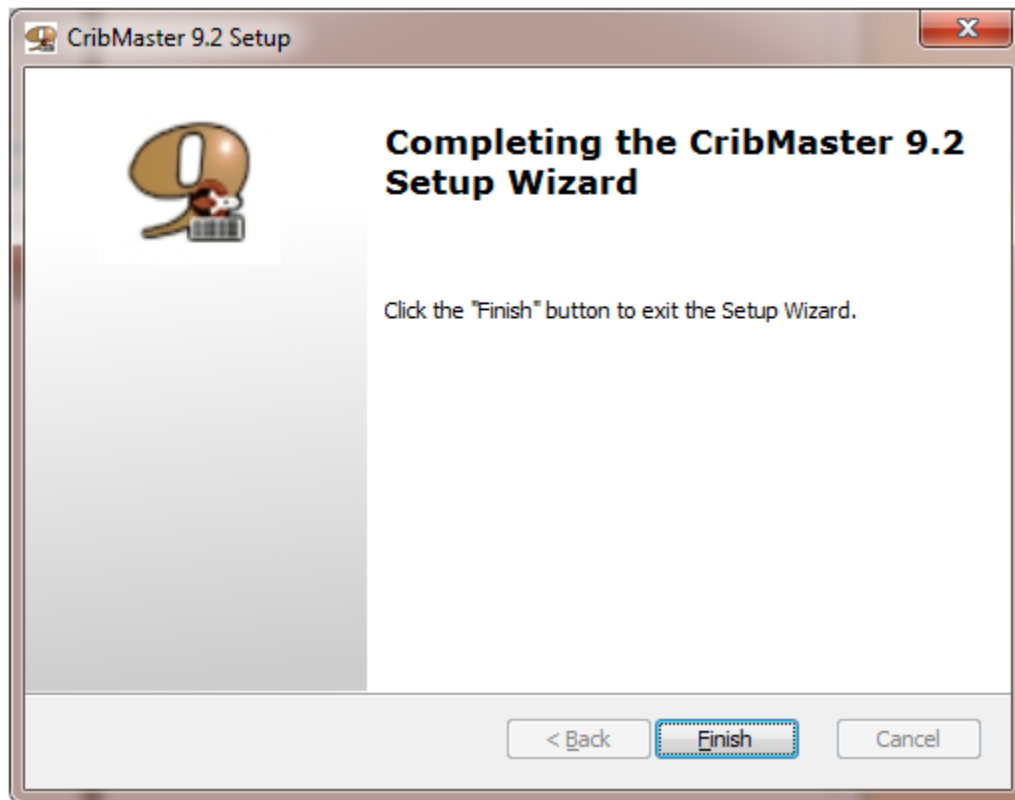
12. Select *I accept the License Agreement*.
13. Click **Next**. The *Start Installation* dialog box displays:



14. Click **Next**.



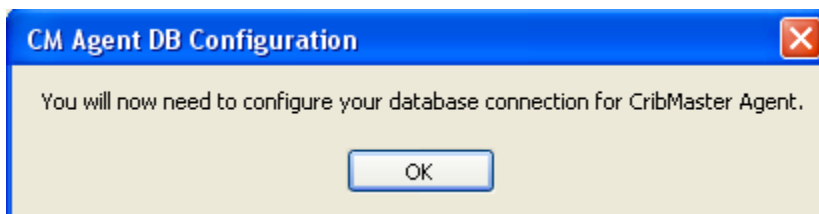
15. Click **Finish**. The CribMaster Installation dialog box displays:



16. Click **Finish**.

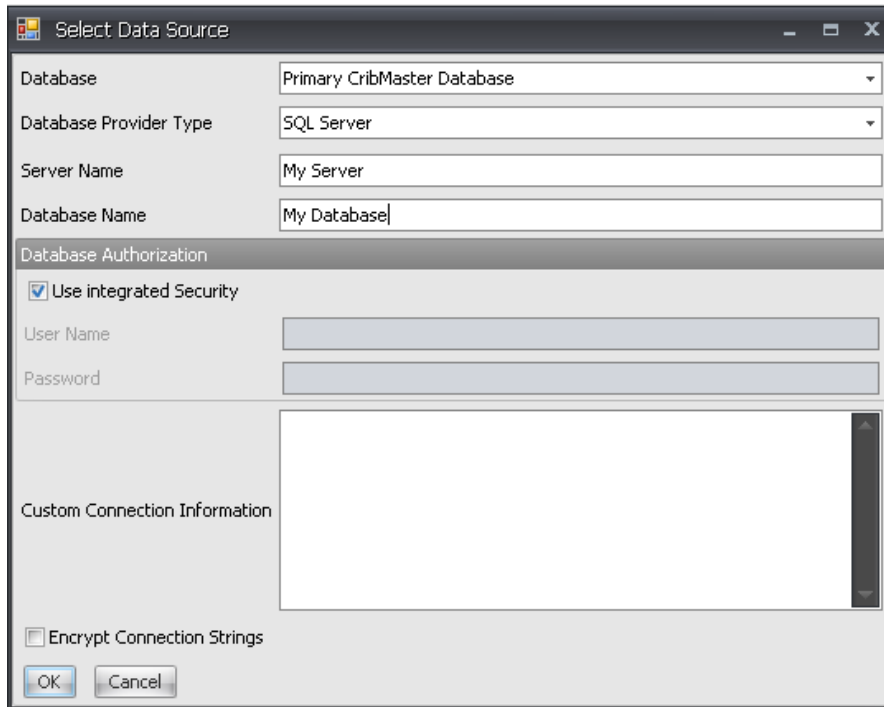
Configuring CM Agent

During the installation process, if you selected "Complete" or "Custom" and selected CM Agent, the following prompt displays during the install process:



1. Click **OK**. The Data Source dialog box displays:

Installing the CribMaster Client



2. Ensure the type of **Database** is *Primary CribMaster Database*.
3. Select Web Service as your **Database Provider Type**.
4. Enter the **Web Service URL**.
5. Click **OK**.

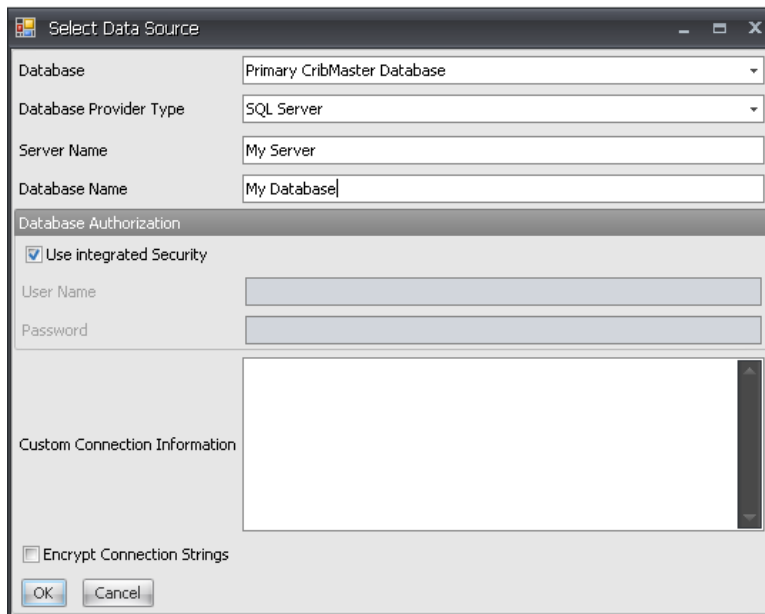
TIP: You can configure CM Agent at a later time by clicking **Start > All Programs > CribMaster > 9.x** and selecting the *CMAgent Configuration* icon.

Chapter 4: Running CribMaster for the First Time

IMPORTANT: CribMaster must be run for the first time be a user with Administrative rights for that computer.

Setting the Data Source

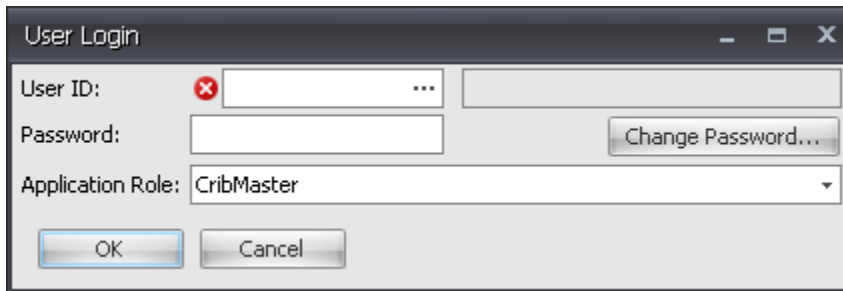
1. To begin CribMaster, click **Start > All Programs > CribMaster > 9.x > CribMaster**. CribMaster displays an error that it cannot connect to the database.
2. Click **OK**.
3. Click **System > Data Source...** The Data Source dialog box displays:



4. Ensure the type of **Database** is *Primary CribMaster Database*.
5. Select Web Service as your **Database Provider Type**.
6. Enter the **Web Service URL**.
7. Click **OK**.

Logging in to CribMaster

When CribMaster displays for the first time, it will display the Sign On New User window with three data entry fields: User ID, Password and Application Role:



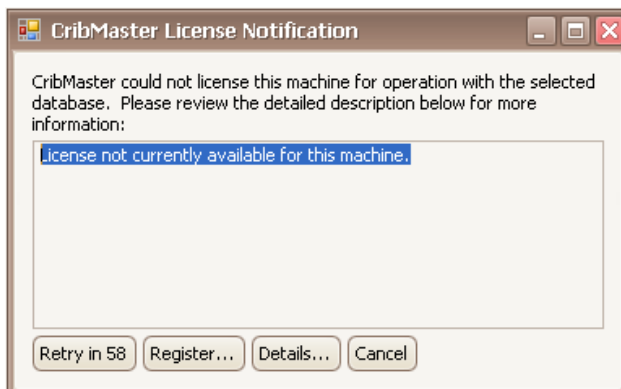
At first, CribMaster recognizes only one User ID: E-00. This is the User ID for the System Administrator and no password is required. A password will be established in one of the steps below.

The button to the right of the User ID field is called the Lookup button (...). If the Lookup button is clicked, a list of valid entries for the data entry field will appear. The Lookup button will appear at other times in the system.

Enter E-00 in the User ID field and click OK. The system administrator has access to all the features of the system, including data entry, transaction processing, and reporting. Other users can be restricted.


Entering the License Code

Before CribMaster can be used, a valid WinWare provided license code must be entered. The system displays a license notification:



Running CribMaster for the First Time

1. Click **Register...** The Enter License Code dialog box displays:



The 'Enter License Code' dialog box has a title bar with a standard Windows icon and control buttons. The main area is divided into sections. The 'Hardware Identification' section contains two input fields: 'Hardware ID' and 'Server Hardware ID'. Below this is a single input field for 'License Code'. At the bottom, there are three buttons: 'OK', 'Cancel', and 'Advanced'.

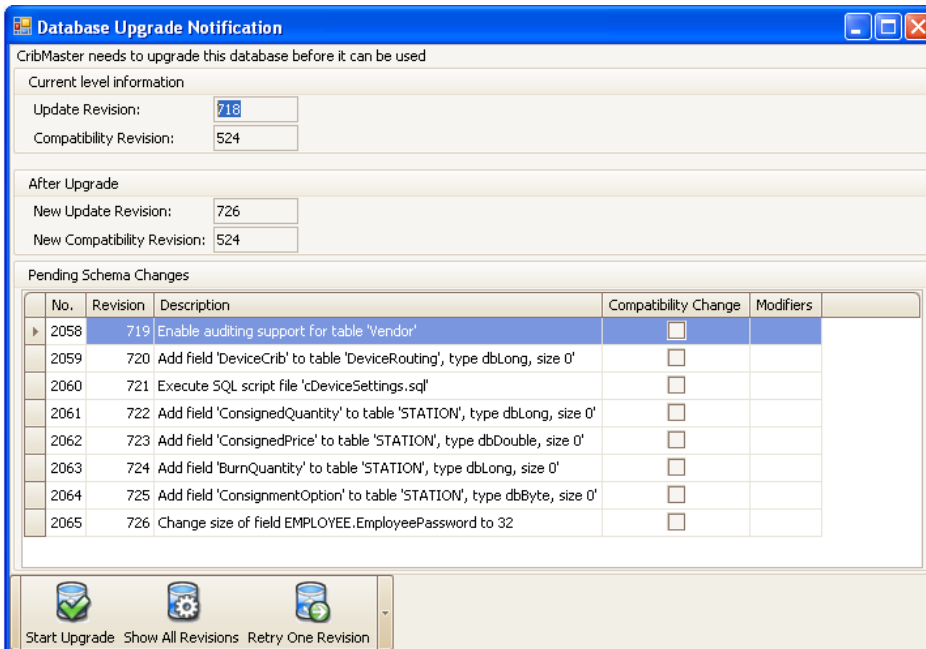
2. Enter the **License Code**.
3. Click OK. CribMaster is registered.

NOTE: A server hardware ID must be provided to WinWare in order to have a permanent license code generated.

Upgrading the database

After setting the data source, CribMaster will need to be restarted.

When it reopens, the Database Upgrade Notification dialog box displays:



The 'Database Upgrade Notification' dialog box has a blue title bar. The main content area is divided into sections. The first section is 'Current level information' with two input fields: 'Update Revision' (containing 718) and 'Compatibility Revision' (containing 524). The second section is 'After Upgrade' with two input fields: 'New Update Revision' (containing 726) and 'New Compatibility Revision' (containing 524). The third section is 'Pending Schema Changes' which contains a table with columns: No., Revision, Description, Compatibility Change, and Modifiers. The table lists several changes, including enabling auditing support and adding fields to tables. At the bottom, there are three buttons: 'Start Upgrade', 'Show All Revisions', and 'Retry One Revision'.

No.	Revision	Description	Compatibility Change	Modifiers
2058	719	Enable auditing support for table 'Vendor'	<input type="checkbox"/>	
2059	720	Add field 'DeviceCrib' to table 'DeviceRouting', type dbLong, size 0'	<input type="checkbox"/>	
2060	721	Execute SQL script file 'c:\DeviceSettings.sql'	<input type="checkbox"/>	
2061	722	Add field 'ConsignedQuantity' to table 'STATION', type dbLong, size 0'	<input type="checkbox"/>	
2062	723	Add field 'ConsignedPrice' to table 'STATION', type dbDouble, size 0'	<input type="checkbox"/>	
2063	724	Add field 'BurnQuantity' to table 'STATION', type dbLong, size 0'	<input type="checkbox"/>	
2064	725	Add field 'ConsignmentOption' to table 'STATION', type dbByte, size 0'	<input type="checkbox"/>	
2065	726	Change size of field EMPLOYEE.EmployeePassword to 32	<input type="checkbox"/>	

Click **Start Upgrade**. The database is upgraded.

Creating System Folders

CribMaster uses folders in the Program Files > CribMaster folder.

To set system folders, follow the steps below:

1. Click **Start > Programs > CribMaster > 9.2 > CribMaster**. CribMaster opens.
2. Click **System > System Options > Configuration...** The Configuration pane displays.
3. Scroll down to **Network Paths (Shared)**.
4. For each entry, enter the path to the appropriate location. This may be on a server or the user's machine:



Network Paths (Shared)	
Update Path	\\<server>\Program Files\CribMaster\9.1\Data\Update
Shared Report Files	\\<server>\CribMaster\9.1\Data
Override path for custom report files (optional)	\\<server>\CribMaster\9.1\Data\Custom
Image Files	\\<server>\CribMaster\9.1\Data\Images
Log Files	\\<server>\CribMaster\9.1\Data\Logs
Email Attachments Drop Box	

In this screenshot, the directories are located on the user's machine.

Entering a System Administrator Password

CribMaster is initially distributed with one employee called System Administrator, who has the Employee ID E-00. This employee has been assigned full access to all CribMaster functions. No password has been assigned to the system administrator. It is not a requirement that a password be established. It is simply a matter of security.

To enter a system administrator password, follow the steps below:

1. Click **Home > Employee...** The Employee Records screen displays.
2. Select the System Administrator record.
3. Click **Properties** . The Employee Properties pane displays.
4. Enter an Employee Password.
5. Click . The password is saved.

IMPORTANT: Do not forget the system administrator password. Otherwise you will not be able to sign on to CribMaster at a later session.

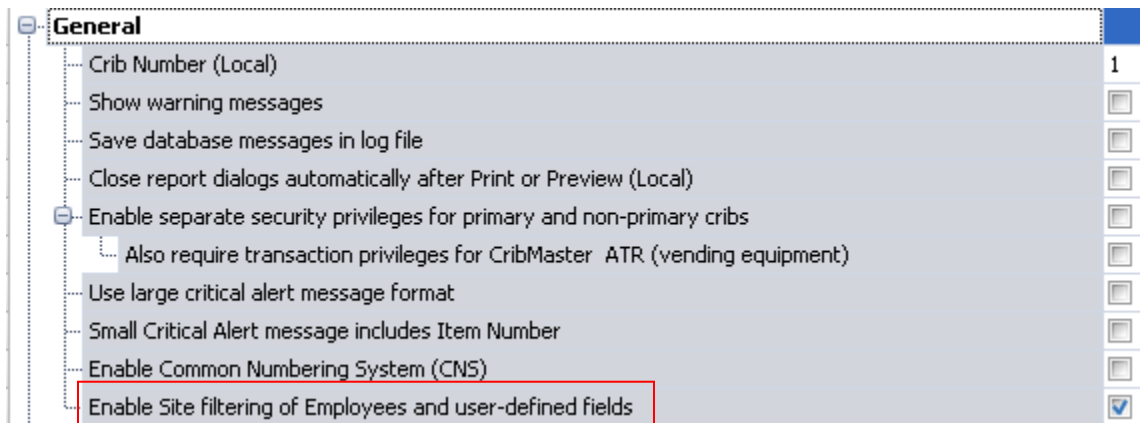
Chapter 5: Activating CribMaster Advantage

In order to use CribMaster Advantage there are two options you have to set, one in the CribMaster client and one in ATR.

Setting Site Filtering in CribMaster Client

To enable Site Filtering in CribMaster, follow the steps below:

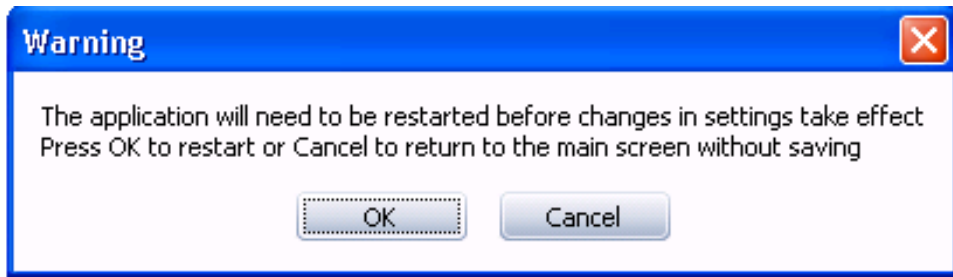
1. Click **System > System Options > Configuration...** The Configuration Options display.
2. Check **Enable Site filtering of Employees and user-defined fields**.



Setting Site Filtering in ATR 9

To enable Site Filtering in ATR 9, follow the steps below:

1. From the main screen, touch **Admin**. The admin screen displays.
2. Touch **Options**. The Options screen displays.
3. Touch **Default Options**. The Default Options tab displays.
4. Set **SiteFiltering** to True.
5. Touch **Save**. The system displays the following prompt:



6. Click **OK**. The application restarts.

Chapter 6: Assigning Sites in CM Client

A Site Profile is a way to identify a customer location. With Advantage, Cribs and Employees must be assigned to a site in order for them to be used with ATR 9. Site information is used to establish crib security, employee privileges and ordering.

When importing data, you can include columns in the Crib and Employee CSVs for the site ID which will associate them as they are imported. However, you can assign site ID's later as new sites, cribs or employees are added to the system.

NOTE: You are able to have one site profile for every CribMaster license, plus one for every additional site profile license:



Creating a Site Profile

To create a site profile, follow the directions below:

1. Click **Purchasing > Site Profiles...** The Site Records Screen displays.
2. Click **New**. The Site Profile Properties pane displays.
3. Enter or accept the **Site ID**.
4. Enter a **Site Name** (if applicable).
5. Enter any additional information.
6. Click .

NOTE: Users are entitled to one site profile per license plus an additional site profile for each additional site profile license. If a user attempts to add more site profiles than they are licensed for, the following error will display:



Chapter 7: Setting CribMaster 9 Options in CM Client

The usability and functions of CribMaster can be altered using the option tabs.

To access the option tabs, click **System > System Options**.

TIP: The options on these tabs are explained on their associated on-line help topics.

WARNING: Unless marker *[Local]*, options that are applied globally, across the entire database.

Chapter 8: Entering User Defined Fields

You can set up User Defined Fields (UDFs) for information you wish to capture for tracking the issue and returns of items in your ATR. You may add User Defined Fields at a later time, but any transactions that have already occurred will not contain this new information. If possible, establish all the categories you want to track at the beginning so your data will be complete.

Creating User Defined Fields in CM Client

To create a user defined field, follow the steps below:

1. Click **System > System Options > User Defined Fields...** The User Defined Fields screen displays.
2. Enter a generic label in an unused field.
3. Select either **Optional** or **Required** for **Issue Transactions**.
4. Select either **Optional** or **Required** for **Work Order Transactions**.


IMPORTANT: When a UDF is Required, it is required for all sites. If the UDF does not apply to a particular site, you can set a default for all employees at the site (Employee Properties > Defaults tab) and hide the UDF in ATR under Default Options.


5. Enter any additional information.
6. Press **Tab**. The field is now ready to be used.

Creating a New User-Defined Field Option

NOTE: UDF options are site-specific.

To create a new user-defined field option, follow the steps below:

1. Click **Home > Your User-Defined Field**. The User-Defined screen displays.
2. Click **New** . The Option Properties dialog box displays.
3. Enter an **ID**.
4. Enter a **Site ID**.

5. Enter a **Name**.
6. Enter any additional information.
7. Click . The option is created.

NOTE: Although this UDF will display for all sites, the option created in the above process will only display for employees with a matching Site ID. Give the option a DEFAULT Site ID to enable all employees to select it.

NOTE: ATR features options to hide any or all UDFs from the user.

Chapter 9: Working with Item Access Codes

Item Access Codes are a way to give inventory items specific designations to help control what items are issued and to what employees. Each Item Access Class is represented by an alphabetic character code A through Z. These are mutually exclusive designations. An inventory item can be associated with one and only one of these codes. However, employees can be associated with one or more of these codes.

For example, assume you have established the following item access codes:

- A - Highly exclusive items
- B - Average items
- C – Low-cost supplies

Each inventory item will be assigned one of the above codes. An employee designated ABC will have access to all inventory items. If designated BC, the employee will not have access to highly exclusive items. If designated C, the employee will only have access to low-cost supplies.

Inventory items are assigned an access code on the Item Information tab of Item Properties. Employees can be assigned one or more access codes on the Access tab of Employee Properties.

IMPORTANT: Item Access Codes are global across all sites. For sites that do not want to limit item access, each employee should have a matching Item Access Code.


Creating an Item Access Code in CM Client

To create an Item Access Code, follow the steps below:

1. Click **System > Item Access Codes...** The Item Access Codes screen displays:
2. Click **New**. A new line is added.
3. Enter an **Access**.
4. Enter a **Description**.
5. Press **Tab**. The code is created.

Applying Item Access Codes to Items in CM Client

Item Access Codes need to be associated with items. To apply an Item Access Code to an item, follow the steps below:

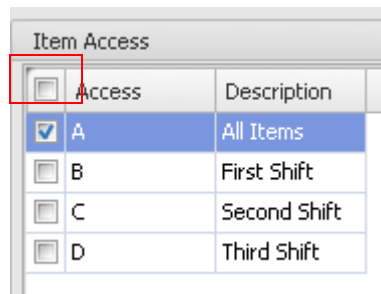
1. Click **Home > Inventory Items...** The Item Records screen displays.
2. Double-click the item for which you want to apply an Item Access Code. The Properties pane displays.
3. On the Item Information tab, select an **Access Code** from the drop-down.
4. Click . The Item Access Code is applied.

Applying Item Access Codes to Employees in CM Client

Item Access Codes need to be associated with employees. To apply an Item Access Code to an employee, follow the steps below:

1. Click **Home > Employee...** The Employee Records screen displays.
2. Double-click the employee for which you want to add limits. The Properties pane displays.
3. Click the Access tab.
4. Select the Item Access Codes to which the employee belongs.

TIP: Check the box in the header to select all codes:



<input type="checkbox"/>	Access	Description
<input checked="" type="checkbox"/>	A	All Items
<input type="checkbox"/>	B	First Shift
<input type="checkbox"/>	C	Second Shift
<input type="checkbox"/>	D	Third Shift

NOTE: With Item Access Codes in place, the list of items available for issue automatically filters to a list of authorized items.

NOTE: If an employee is not assigned any access codes, they will only be able to be issued items that are likewise not assigned any access codes.

Chapter 10: Working with Security Access Codes

Security access codes are used to grant or deny employees access to certain CribMaster functions. Security access codes offer a way of grouping job functions together and then assigning that group of functions to an employee. These codes are used in combination with the Crib Privileges section on the Access Tab of the employee properties.

NOTE: Security Access Codes are only needed for employees that need to log into the CribMaster Client or ATR for administrative functions or if using Primary and Non-Primary privileges. See the section below on Primary and Non-Primary Settings.

Some examples would be:

<u>Classes</u>	<u>Access</u>
Administrator	Has access to all functions of CribMaster
Data Entry	Has access to Employee, Job setup, etc.
Crib Attendant	Has access to Issue and Return functions
Purchasing	Has access to purchasing functions
Transfer Clerk	Has access to Transfer function
Receiving Clerk	Has access to Receiving function


Primary and Non-Primary Settings

The option to split crib privileges into primary and non-primary is enabled by checking *Enable separate security privileges for primary and non-primary cribs* on the Configuration tab of System Options.

This option allows you to create a set of privileges for employees for cribs that are not selected on the Crib Access tab. Enabling this option is *not* recommended for Advantage as it would mean having to set rights for every employee in the database.

Adding a Security Class in CM Client

To add a security class, follow the steps below:

1. Click **System > Security Access Codes...** The Security dialog box displays.
2. Enter a **Code**.
3. Enter a **Description**.
4. Press **Tab**.
5. Select the appropriate permissions in the right pane.
6. Click . The security class is created.


NOTE: Remember, you must go to the employee setup screen and set the access levels for each employee before access restrictions will take effect.

Chapter 11: Working with Employees

Employees must have a record and an assigned identity in CribMaster before they can be issued items. The employee properties set the rights each employee has with regards to item access and system permissions.

Creating an Employee in CM Client

To create a new employee, follow the steps below:

1. Click **Employee**. The Employee Records screen displays.
2. Click **New**. The Employee Properties pane displays.
3. Enter or accept the **Employee ID**.
4. Enter a **Site ID**.
5. Enter a **First Name**.
6. Enter a **Last Name**.
7. Enter any additional information.
7. Click . The employee is created.

NOTE: Assigning an Employee the DEFAULT Site ID will give that employee access to all vending cribs, but the employee must also have permissions to do anything other than Issue and Return items at the ATR.

Setting an Employee's Access

To edit an existing employee, follow the steps below:

1. Click **Employee**. The Employee Records screen displays.
2. Select the employee whose access you want to set.
3. Click **Properties**. The Employee Properties dialog box displays.
4. Click **Access**. The Access tab displays.
5. Set **Primary Crib Privileges** (if necessary).
6. Set **Item Access** (if necessary).
7. Grant or deny the employee access to the functions listed in the lower box.

TIP: Use the plus and minus icons to expand or collapse the list of functions.



8. Click . The employee record is saved.

Chapter 12: Working with Cribs

Cribs are collections of bins in either sectioned areas of a facility or a vending machine.

Creating a Crib in CM Client

To create a crib in CribMaster, follow the steps below:




1. Click **Home** > **Bin...** The Crib / Bin Records screen displays.
2. Click **New Crib** . The Crib Properties screen displays.
3. Enter or accept the **Crib Number**.
4. Select a **Crib Type**.
5. Select a **Crib Order Type**.
6. Enter a name in the **Name** field.
7. Enter a **Site ID**.
8. Enter any additional information.
9. Click . The Crib is now available.

Chapter 13: Working with Suppliers

Suppliers are the vendors from which items are purchased.

Creating a Supplier in CribMaster Client


To create a new supplier record, follow the steps below:


1. Click **Supplier**. The Supplier Records screen displays.
2. Click **New** . The Supplier Properties pane displays.
3. Enter or accept the **Supplier ID**.
4. Enter a **Supplier Name**.
5. Click **Properties** .
6. On the Address Information tab, enter the address.
7. Enter contact information.
8. Enter any additional information.
9. Click . CribMaster adds the supplier to the list.

Creating Blanket Purchase Orders in CribMaster Client

The purchase settings for an item, such as price, may differ from site to site. To account for this, you can create a Blanket Purchase Order that encompasses all of your different sites.


1. Click **Supplier**. The Supplier Records screen displays.
2. Select the supplier for which you want to create the Blanket PO.
3. Click **Properties**. The Properties pane displays.
4. Click the **Blanket PO** tab. The Blanket PO tab displays.
5. On the Blanket Order Number field, click **Add Blanket PO (+)**.
6. In the dialog box that displays, enter a name for the Blanket PO. This is usually the Site ID.
7. Click **OK**.
8. Select a **Site ID**.
9. In the lower section, enter the item information, including Cost, for every item you want to include.

TIP: Click **Add** () to add items to the list.

10. Once the Blanket PO has been created, click . The Blanket PO is saved.

Setting the Preferred Supplier in CribMaster Client

Now that a blanket PO has been established, it must now be assigned to the crib as a Preferred Supplier.

1. Click **Home > Bin...** The Crib/Bin Records screen displays.
2. Double-click the Crib to which you want to assigned the Preferred Supplier. The Crib Properties pane displays.
3. Click the Advanced tab. The Advanced tab displays.
4. Under Preferred/Default Supplier Options, select *Allow bins to be assigned to any supplier*.
5. For Preferred Supplier, select the supplier for that site. The system will assign the appropriate Blanket PO based on the crib's Site ID.
6. Click . Changes are saved.

Chapter 14: Working with Items

Items are anything that can be issued from your crib to a user. Before items can be issued, they must be created in CribMaster and assigned to a bin.

IMPORTANT: Item information is global across all sites.

There are six possible items you can create in CribMaster:

Expendable - An item that is issued, and expensed immediately. There is no checkout record written, only an ISSUE transaction. This item type is also known as a consumable item.

Reworkable - An item that comes into the system as new, is tracked through its use via a checkout record and is returned to the crib. Additionally Reworkable items are tracked during the rework/regrind process and then checked back into the system as a reworked item. CribMaster tracks both new and reworked items. It does this by requiring the new item to have an associated item ID that represents the reworked item. This reworked Item ID must be entered into the Rework Item field on the Rework tab of the inventory properties. When a rework Item ID is associated, it is assumed that when this item is sent to rework, it will automatically be returned under the reworked Item ID. This field can also be used for linking the two items for the purchasing system. If no Reworked Item ID is entered, it indicates that this item is a reworked item and cannot be purchased. In addition, when a reworked item is sent back to rework, it will be checked back in as the same reworked item. This gives you the ability to look at your stock and see both new and reworked quantities.

Durable - An Item that is issued (ISSRT) and a checkout record is written, and is returned to the same item number and bin location, usually in a re-usable condition.



Durable-Serialized - Same as Durable, but Serialized. This is done through the Serialized checkbox. Each item will have its own unique identifier, or Serial ID.

Gauge - Same as Durable-Serialized, but with certification abilities (Once an item is classified as a Gauge it cannot ever be changed to a different Item Type)

Kit - A logical or physical (assembly) grouping of the above item types.

Creating an Item

To create an inventory item, follow the steps below:

1. Click **Home > Inventory Items**. The Inventory Records screen displays.
2. Click **New Item** . The Inventory Properties pane displays.
3. Enter an **Item Number**.
4. Select an **Item Type**: Expendable, Reworkable, Durable, Gauge, Kit
5. Enter a description of the item in the **Description 1** field.
6. Enter any additional information.
7. Click . The item is created.

Chapter 15: Working with Bins

Bins are physical and logical space designations in which items are assigned and placed. Each bin is numbered in a format that helps to organize them according to various criteria including type of item, type of vending machine, placement of bins and so on.

Understanding Bin Numbering

The CribBin number is used by CribMaster to identify item locations. It is composed of the crib number, a dash and a combination of alphanumeric characters. CribBin numbers can be up to 15 characters long; that includes the crib number and dash. For facilities that only have one crib, that crib is almost always numbered as 01; however, you can use any crib number scheme using cribs 01 through 32767.

NOTE: All crib numbers must be at least two digits. If the crib number is a single digit, a leading zero will be automatically added to the CribBin number.

Each CribBin may only contain one item number. If you want to use common bin names for some locations, you will need to append a number to the bin for each item you want to store at that location i.e.

01-Closet-001 Contains item 1
01-Closet-002 Contains item 2
01-Closet-003 Contains item 3

Bin Numbers

Bin numbers can be up to 12 alphanumeric characters and can be separated further with additional dashes.

For example:

If a facility has 2 cribs, each crib containing 3 bins; their numbering scheme would look like the following:

Crib 01 -
01-01
01-02

01-03

Crib 02 -

02-01

02-02

02-03

The bin numbers above (the last two digits in each set) are just examples. You can use any character combination after the crib, but the crib must always be numbers and at least two characters long. The following examples are also valid Crib/Bin numbers:

Crib 01 -

01-0A

01-0B

01-0C

Crib 02 -

02-01-A

02-01-B

02-01-C

NOTE: Do not put spaces or * in your bin numbers if you plan to bar code your bins. Windows will print a space in your bar code instead of the bar code for the space. This creates an unreadable bar code.

Crib-Specific Bin Numbers

If the crib is a machine with lockers, doors or drawers, its bin numbers can be set to include them. For example, if the crib is an Accu-Drawer and the item is located behind the third drawer, the CribBin number might look like this: 01-03-01. In this example, the center digits (03) represent the drawer that contains the item. Some cribs, like the Accu-Cab, have a single opening and do not require a specialized bin number.

Pro Stock

Crib - Drawer - Slot Number/Bin

For Example:

10-128-56

ToolBox

Crib – Row - Starting Slot

For Example:

10-1-01

Weigh Station

Crib – Placeholder* – Device Number – Scale Number

* - This can be used as a custom identifier for your cabinet. For example, it can represent the shelf number.

For Example:

01-10-S0001-1

NOTE: The device number in the example above refers to the Scale Shelf Board to which the scale is wired.

Other Considerations

- As the bin field supports alpha characters, it is advisable to use fixed length numbers with leading zeros for the numeric portions of the bin numbers so that sorting will be easier. Bin numbers will sort like characters i.e.

01-1
01-10
01-2

To get this to sort properly you would need to number them:

01-01
01-02
01-10


- Bin numbers should be as brief as possible. Shorter bar codes will scan quicker and easier.

Creating a Bin in CribMaster Client

To create a new bin, follow the steps below:

1. Click **Home > Bin...** The Crib/Bin Records screen displays.
2. Click **New Bin**. The Bin Properties pane displays.
3. Select the Crib Number to which you want to add the bin.

NOTE: By default, this field is populated with the crib that is highlighted when you click New bin.

4. Enter or accept the existing **Bin ID**.
5. Enter or select an Item to which to assign the new bin.
6. Optionally, enter an **Override Issue Price**.
7. Optionally, enter the customer-specific item number in the **Bin Comment** field.
8. Optionally, enter **Order Information**.
9. Optionally, select a supplier for **Override Primary Supplier** on the Order Information tab.
10. Enter any additional information.
11. Click . The bin is created.

Chapter 16: Understanding Cycle Counting

CribMaster includes support for performing a running inventory reconciliation of all the bins maintained by CribMaster. The inventory reconciliation process is controlled by parameters you set here: **System > System Options > Cycle Counting**.

The total cycle is the period in which all the bins are to be counted. This period can be anywhere from 1 month to 2 years. When you first set the options for Inventory Reconciliation, specify when the next cycle is to be completed and the length of the following cycles.

The total cycle is broken down into one or more periods called sub cycles. Sub cycles can be as short as 1 day or as long as the total cycle. Sub cycles assist in counting the bins over time so that the workload of counting the bins can be distributed over the total cycle.

CribMaster supports manual and automatic scheduling of bins to be counted. When a bin is scheduled for counting, it is added to the bin count list. Refer to description of the Bin Inventory Window for information on working with the count list. If automatic scheduling is enabled, CribMaster automatically adds bins to the count list as needed to keep the inventory process on schedule. Bins can be prioritized for scheduling based on the elapsed time since the previous count, the number of items in the bin (fewer items are easier to count), or proximity (bins close to each other are easier to count).

As time goes by, CribMaster will continue to add items to the counting schedule. If you do not count bins and confirm or adjust their counts, the list will get longer and longer.

Adjusting the Bin Count in ATR

To adjust the bin count from ATR, follow the steps below:

1. Approach the monitor.
2. Do one of the following:
 - Scan your employee badge.
 - Double-Touch your name.
3. Touch **Admin**. The Admin screen displays.

4. Touch **Count**. The count screen displays.
5. Select the item you want to count.
6. Touch that bin on the count screen.
7. Touch **Count**. A keypad displays with the current quantity in the blank.
8. Do one of the following:
 - If the number of items in the bin matches the listed quantity, touch **Enter**.
 - If the number of items in the bin does not match the listed quantity:
 - a. Use the keypad to enter a new quantity.
 - b. Select a **Reason Code** if necessary.
 - c. Touch **Enter**. The quantity is changed.

NOTE: Counts for serialize items cannot be adjusted.

Once the count is entered, the **Date Counted** field populates on the Bin Information tab of that bin's properties. If you adjusted the item count, the Items in Bin field is also updated.

Entering an Actual Count in CribMaster Client

To enter an actual count, follow the steps below:

1. Click **Actions > Cycle Counting...** The Cycle Counting screen displays.
2. Select a crib whose bins require counting. The left pane populates with the bins that are due for a count.
3. Enter the number of items into the **Actual Count** column.

NOTE: If you enter an Actual Count that is the same as the Expected Count, a check mark displays next to the CribBin. If you enter an Actual Count that is not the same as the Expected Count, an "x" displays next to the CribBin.



4. Click **Mark Verified** . The bin counts are marked.


NOTE: Once bin counts have been marked, their entries turn gray.

Adjusting the Bin Count from the Cycle Counting Screen

To adjust the bin count from the Cycle Counting screen, follow the steps below:

1. Click **Actions > Cycle Counting...** The Cycle Counting screen displays.
2. Select a crib whose bins require adjusting.
3. Select the bin that requires adjustment.




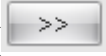
4. Click **Adjust/Record** . The Adjust/Record Bin Count dialog box displays.
5. Enter a **New Bin Quantity**.
6. Enter a **Reason Code** if necessary.
7. Click **Yes**. The quantity is changed.

Counting Serialized Items in CribMaster Client

To count serialized items in the CribMaster Client, follow the steps below:

1. Click **Actions > Cycle Counting...** The Cycle Counting screen displays.
2. Select a crib whose bins require counting. The left pane populates with the bins that are due for a count.
3. Select a bin with a serialized item.



4. Click **Serialized** . The Serialized Item Count screen displays.
5. To account for a present Serial ID, select it in the left pane and click the right-pointing arrows (). The serial ID moves to the right pane.

TIP: If a serialized item is present in the bin but does not display in the left pane, enter it in the **Scan/Enter Serial ID** field.

6. When the serial IDs have been accounted for, click **OK** ().

NOTE: Serial IDs that do not belong to that bin, but are accounted for on the Serialized Item Count screen, will be marked in the transaction records as an incorrect bin.

7. Back on the Cycle Counting screen; enter the number of items into the **Actual Count** column.



8. Click **Mark Verified** . The bin counts are marked.

Chapter 17: ATR Basics

Many functions in ATR are machine specific. This chapter covers functions that can be used regardless of the machine.

Connected Versus Disconnected States in ATR

ATR can run in one of two states: Connected (meaning connected to the web service and CribMaster database) and Disconnected. There are certain functions that are not available when ATR is disconnected from the web service. This table lists those functions:

Function	Connected	Disconnected
Adjust	X	
ATR Diagnostics	X	X
Complete Transfers	X	
Cost Centers	X	X
Count	X	
Crib Access	X	
Event Log Messages	X	
Favorites Screen	X	
Find Item	X	X ¹²
Issue	X	X
Item Access	X	X
Item Limits	X	
Items Out Screen	X	X
Linked Files	X	X ³
Prostock Configuration	X	X
Receive Purchases	X	
Return	X	X ⁴
RFID Details	X	X
Transaction History Screen	X	
Web Catalog	X	

¹ The All Cribs option is not available in Disconnected Mode.

² Serial IDs cannot be searched when ATR is in Disconnected Mode.

³ Linked websites require ATR be in Connected Mode.

⁴ Passive machines only.

Adjusting Item Counts in ATR

NOTE: You must have stock adjustment permissions to use Adjust Mode.


To adjust bin quantities in ATR, follow the steps below:

1. Approach the monitor.
2. Do one of the following:
 - Scan your employee badge.
 - Double-Touch your name.

3. Touch **Admin** . The Admin screen displays.

4. Touch **Adjust** . The Adjust screen displays.

5. Select an item to adjust its quantity.

6. Touch **Adjust** . A keypad displays with the current quantity in the blank.

7. Select a Reason Code if necessary.
8. Use the keypad to enter a new quantity.
9. Touch **Adjust**. The quantity is changed.

Once the count is entered, the Date Counted field populates on the Bin Information tab of that bin's properties.

Linking Files for ATR in CM Client

Files can be linked to bins and items in CribMaster to be visible to users of ATR.

Linking Guidelines

- The following file types are supported: JPG, PDF (Requires Adobe Acrobat Reader to view), XLS (Requires Microsoft Excel to view), DOC (Requires Microsoft Word to view), BMP, PNG, GIF, RTF (Requires Microsoft Word to view)

- You can also link web sites to items and bins. Supported sites include but are not limited to: HTML and ASPX extensions.




NOTE: ATR will only display linked web sites when in Connected Mode.

- ATR downloads the image files once a week and places them under the ATR directory in the Local Links folder.
- Links are supported with HTTP, FTP or shared network folders. The Web Service or client machine will require access to these locations to download and display the links.
- Files larger than 125 KB will not display or be downloaded to ATR, although they will still be viewable in CribMaster.

Linking Files in CM Client

Linking Files to Items




To link a file to a item in CribMaster, follow the steps below:

1. Click **Home > Inventory Items...** The Item Records screen displays.
2. Select the item you want to edit.
3. Click **Properties**. The Item Properties dialog box displays. The Item Information tab is in focus by default.
4. Click the **Links** tab.
5. Click **New** . A new line is added to the list.
6. Enter a **Description** that explains the type of file to which you are linking.
7. Under **Filename**, click the Browse button ().
8. Locate the file you want to link.
9. Click **Open**.
10. Enter any needed **Print Codes**.
11. Click .

Linking Files to Bins

To link a file to a bin in CribMaster, follow the steps below:

1. Click **Home > Bin...** The Crib/Bin Records screen displays.
2. Select the bin you want to edit.

3. Click **Properties**. The Bin Properties dialog box displays. The Bin Information tab is in focus by default.
4. Click the **Links** tab.
5. Click **New** . A new line is added to the list.
6. Enter a **Description** that explains the type of file to which you are linking.
7. Under **Filename**, click the Browse button ().
8. Locate the file you want to link.
9. Click **Open**.
10. Enter any needed **Print Codes**.
11. Click .

NOTE: When files are linked to both the bin and the item in the bin, the linked file for the bin takes precedence in ATR.

NOTE: The first time some items are displayed, Windows shows a file open box with a checkbox that needs to be unchecked to allow the file to automatically open.

Viewing Linked Files in ATR

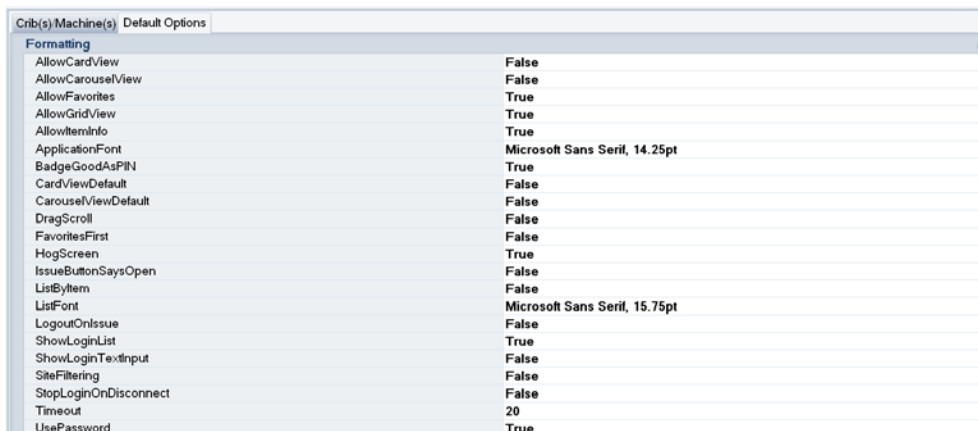
Enabling Images in ATR

To enable image viewing in ATR, follow the steps below:

1. From the main screen, touch **Admin**. The admin screen displays.
2. Touch **Options**. The Options screen displays.

NOTE: In order to access the Default Options screen, you must be assigned to the DEFAULT site profile or have the Misc > ATR Options permission set in CribMaster Client.

3. Click **Default Options**. The Default Options screen displays.
4. Scroll down to the Formatting section:



Crib(s)/Machine(s) Default Options	
Formatting	
AllowCardView	False
AllowCarouselView	False
AllowFavorites	True
AllowGridView	True
AllowItemInfo	True
ApplicationFont	Microsoft Sans Serif, 14.25pt
BadgeGoodAsPIN	True
CardViewDefault	False
CarouselViewDefault	False
DragScroll	False
FavoritesFirst	False
HogScreen	True
IssueButtonSaysOpen	False
ListByItem	False
ListFont	Microsoft Sans Serif, 15.75pt
LogoutOnIssue	False
ShowLoginList	True
ShowLoginTextInput	False
SiteFiltering	False
StopLoginOnDisconnect	False
Timeout	20
UsePassword	True

AllowCardView - If FALSE, Card View is not available to display. If TRUE, Card View is accessible and will display the first available image link on each card. (Default = FALSE)

AllowCarouselView - If FALSE, Carousel View is not available to display. If TRUE, Carousel View is accessible and will display the first available image link on each card. (Default = FALSE)

AllowGridView - If TRUE, Grid View is available to display. If FALSE, Grid View is not available to display. If the AllowCardView, AllowCarouselView and AllowGridView options are all FALSE, AllowGridView will display as if TRUE. (Default = TRUE)

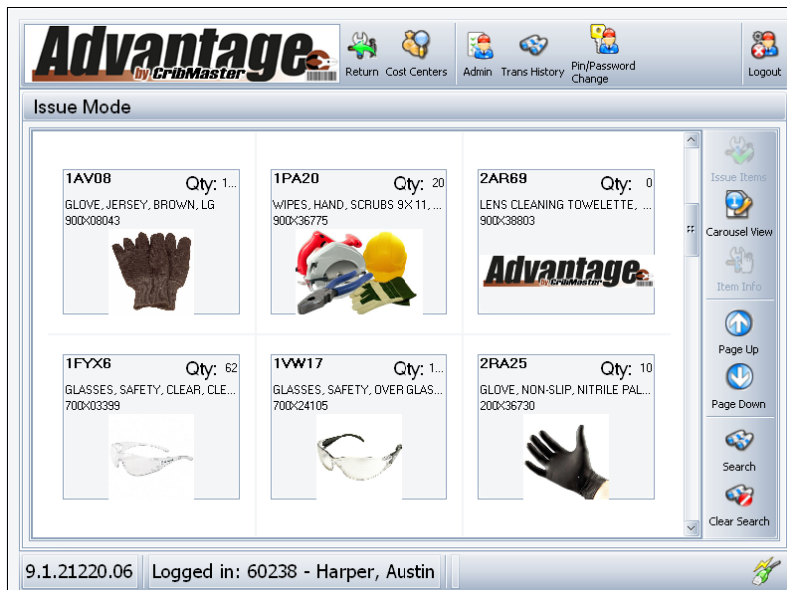
AllowItemInfo - If TRUE, the Item Info Button will display any valid links. Valid links are 125KB or smaller and one of the following file types: BMP, DOC, GIF, HTML, JPG, PDF, PNG, RTF or XLS. If FALSE, the Item Info Button will not display. (Default = TRUE)

CardViewDefault - If FALSE, Grid View is the default view for the Issue Screen. If TRUE, Carousel View is the default view for the Issue Screen. If the AllowCarouselView option is FALSE or the CardViewDefault option is TRUE, this option is inapplicable. (Default = FALSE)

CarouselViewDefault - If FALSE, Grid View is the default view for the Issue Screen. If TRUE, Carousel View is the default view for the Issue Screen. If the AllowCarouselView option is FALSE or the CardViewDefault option is TRUE, this option is inapplicable. (Default = FALSE)

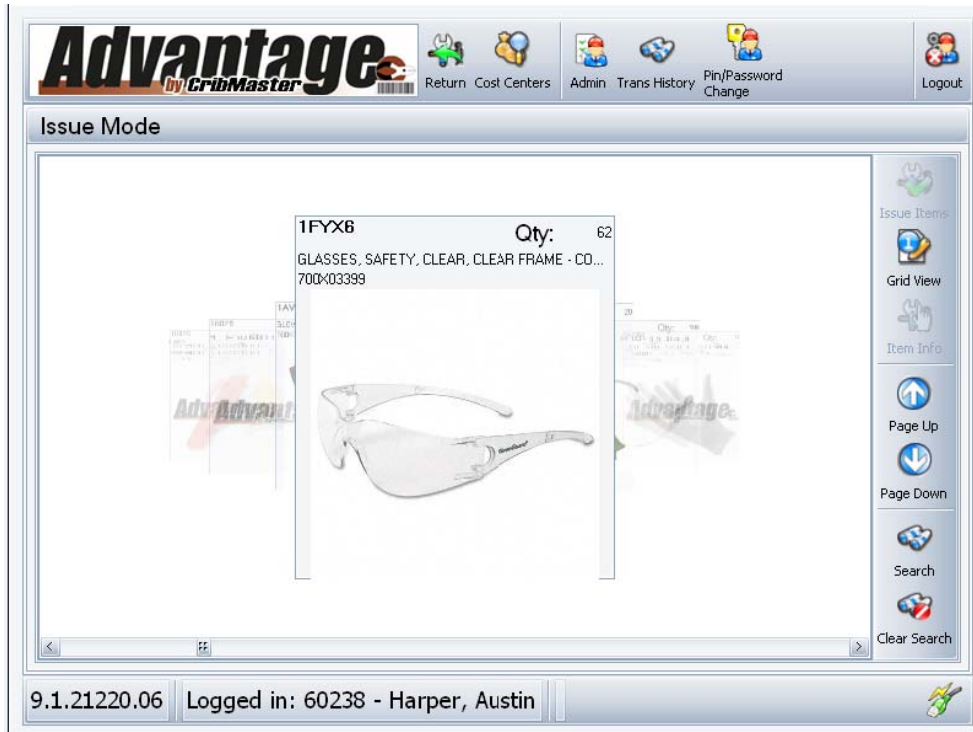
Card View

To view images, click **Card View** from the Issue Screen.



Carousel View

To view images, click Carousel View from the Issue Screen.

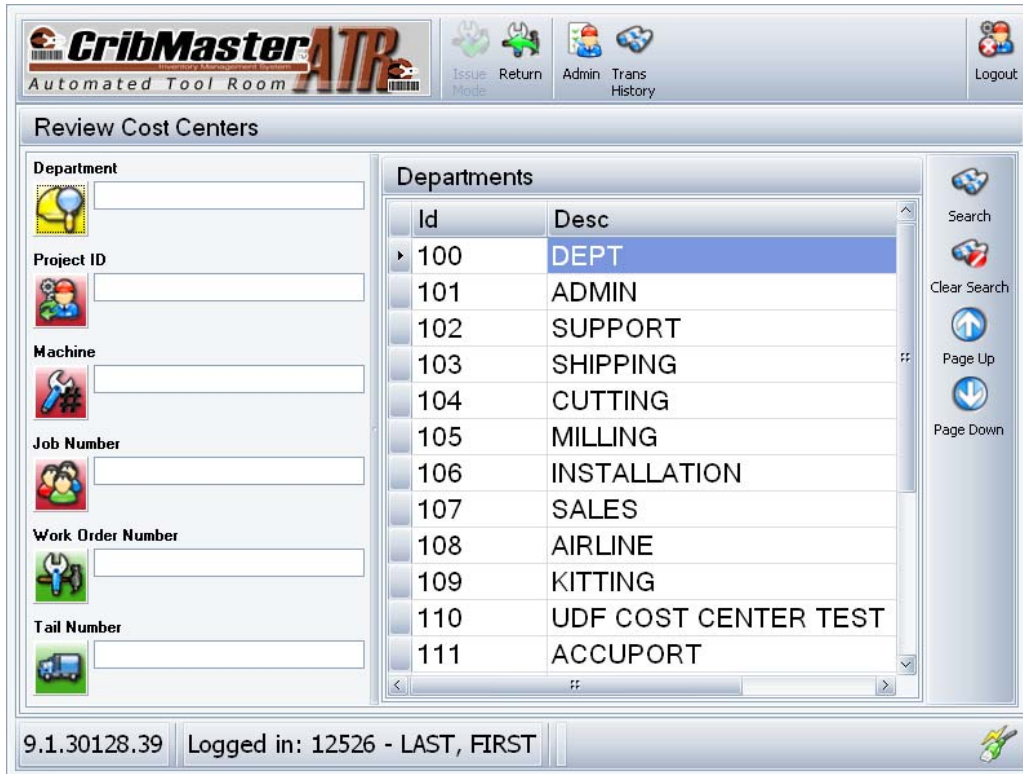


Using the Cost Centers Screen in ATR

The Cost Centers screen is used in ATR to help enforce crib and item security for users issuing tools out of the crib.

Using the Cost Centers Screen

Depending on the options set for ATR, the Cost Centers screen may display as soon as a user logs in or the user may have to access it manually by pressing the Cost Centers button:



Features of the new Cost Centers screen:

- Color codes signify whether or not the data is acceptable:
 - Red – Blank or data is invalid
 - Yellow – This is the cost center in focus.
 - Green – Data is valid and acceptable
- An **OPEN** button has been added to the Cost Center screen for all Passive Devices (for situations where the user purposely goes to the Cost Center Screen).
- The grid configuration means less clicks are required to fill out the screen. The Select button has been removed.

The CostCentersFirst Option

The CostCentersFirst option is available on the Default Options tab in ATR. If the option is FALSE, the Cost Centers Screen displays first if UDFs are required, otherwise only by pressing the Cost Centers Button. If TRUE, the Cost Centers Screen always displays prior to the Issue Mode Screen. (Default = FALSE).

- If cost centers are valid (green) and the option *CostCentersFirst* is set to **FALSE**, the user will go directly to the Issue Mode screen. In addition, if the option *OpenOnAuthentication* is set to **TRUE**, the machine will unlock automatically.

NOTE: If the user presses the Cost Center Button, ATR will not automatically move to Issue Mode (or open on authentication).


- If the option *CostCentersFirst* is set to **TRUE**, the user will always be brought to the Cost Center Screen first regardless of whether or not their data is valid.
- If the user's data is invalid then they will not be allowed to access "Issue Mode" regardless of whether or not the option *CostCentersFirst* is set to **TRUE**.

Using the Find Item Button in ATR

ATR features a Find Item function that allows users to locate items without having to log in. Users can search within one crib or every crib at the site.

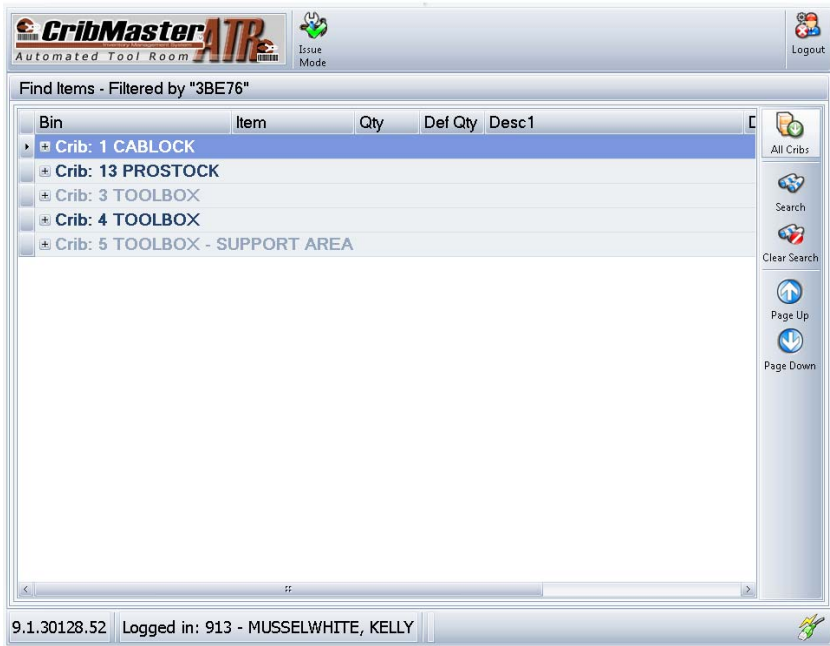
Using Find Item on the Login Screen



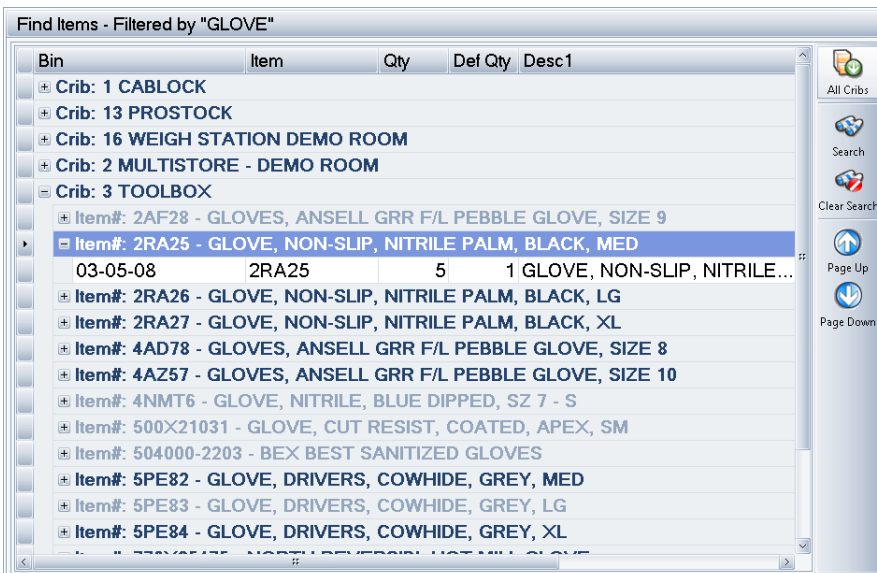
1. At the login screen, select the Find Item button (). An onscreen keyboard displays.
2. Enter your search criteria.

NOTE: The Find Item function can search on any of the following fields:

- Item Number
 - Description1
 - Description2
3. Select **Enter**. ATR displays matching records. Results on the Find Items screen are sorted by Crib, Item, then CribBin. Any locations without quantity greater than the default issue quantity will be ghosted:



TIP: By default, Find Item locates the items within the crib from which you are searching. However, you can select **All Cribs** which will expand your search to all cribs in the site. Select any of the cribs to expand them:



Using Find Item on the Transaction History Screen

At the Transaction History screen, do one of the following:

- Select **Find Item** to search on the first item in the list.
- Select an item from the list and then select **Find Item** to search for the selected item.

The Find Items screen displays results for either the selected item or the first item in the list.

NOTE: By default, using Find Item from the Transaction History Screen will display locations and quantity for that item at all cribs within the site. Select the **All Cribs** button to toggle to locations for just the current crib.

Using Find Item on the Issue Mode Screen

At the Issue Mode screen, do one of the following:

- Select **Find Item** to search on the first item in the list.
- Select an item from the list and then select **Find Item** to search for the selected item.

The Find Items screen displays results for either the selected item or the first item in the list.

NOTE: By default, using Find Item from the Issue Mode Screen will display locations and quantity for that item at all cribs within the site. Select the **All Cribs** button to toggle to locations for just the current crib.

Using ATR Diagnostics

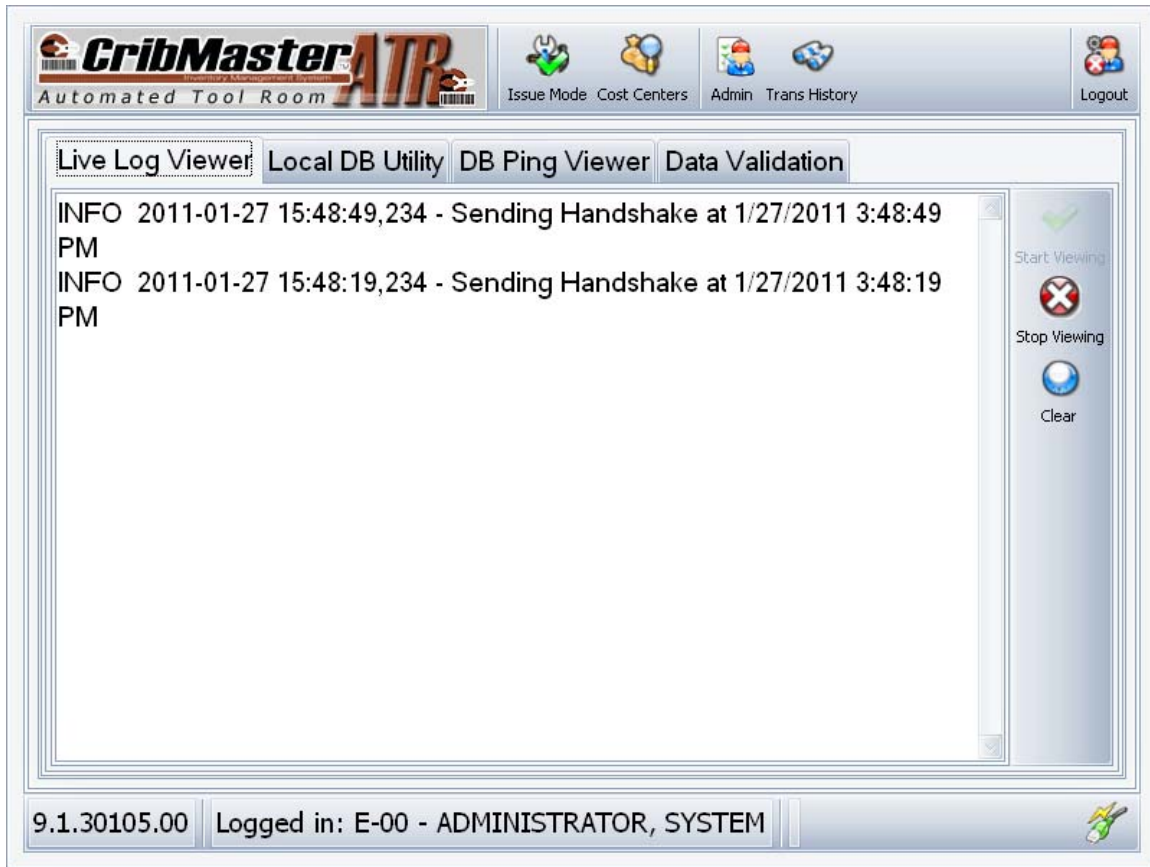
NOTE: In order to use ATR Diagnostics you must be assigned to the DEFAULT site profile or have the Misc > ATR Options permission set in CribMaster Client.

ATR diagnostics are used to monitor database connection and data integrity.




Using the Live Log Viewer

The Live Log Viewer allows the user to view an active log of ATR 9 processes.

To access the Live Log Viewer, touch **Admin > Diagnostics**. The Live Log Viewer displays by default:



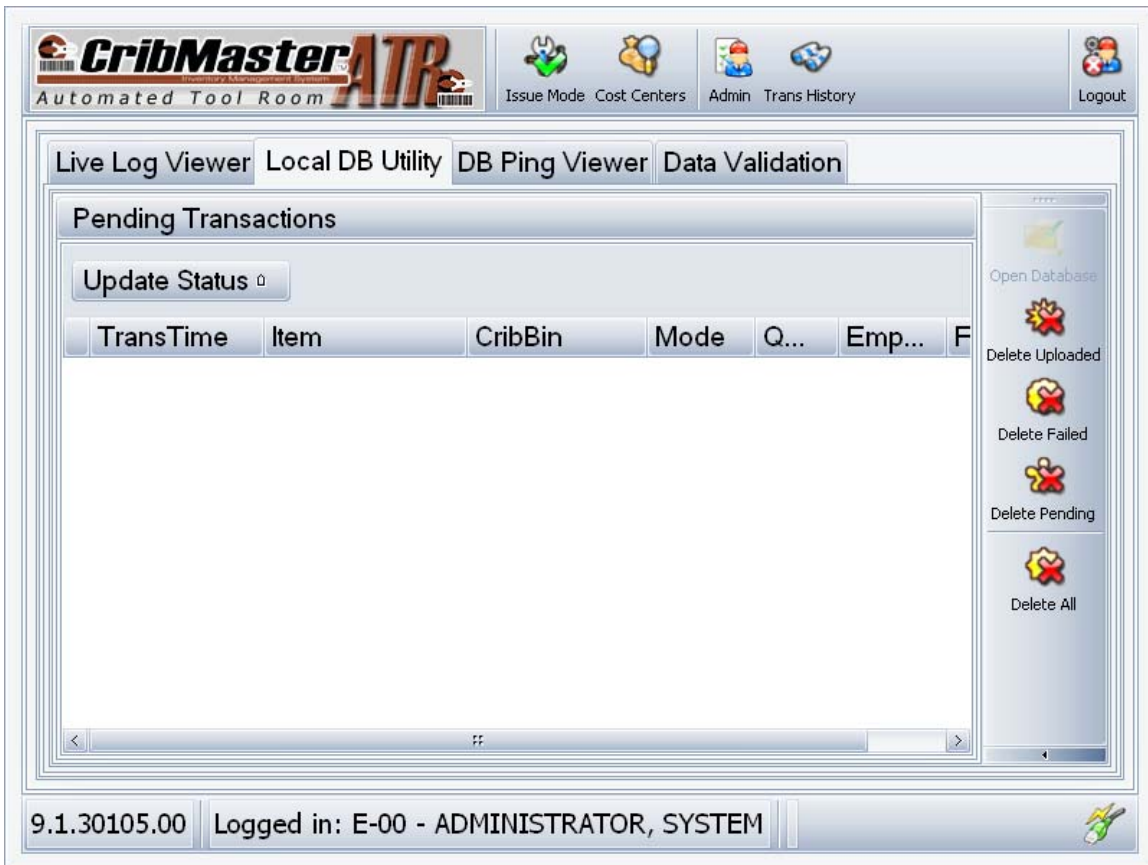
The following buttons are available on the Live Log Viewer tab:

 Start Viewing	Touch this button to begin viewing logs.
 Stop Viewing	Touch this button to stop viewing logs.
 Clear	Touch this button to clear the screen.




Using the Local DB Utility



The Local DB Utility allows you to view transactions before they are uploaded to the CribMaster Database.

To access the Local DB Utility, touch **Admin > Diagnostics > Local DB Utility** tab. The Local DB Utility displays:



The following buttons are available on the Local DB Utility tab:

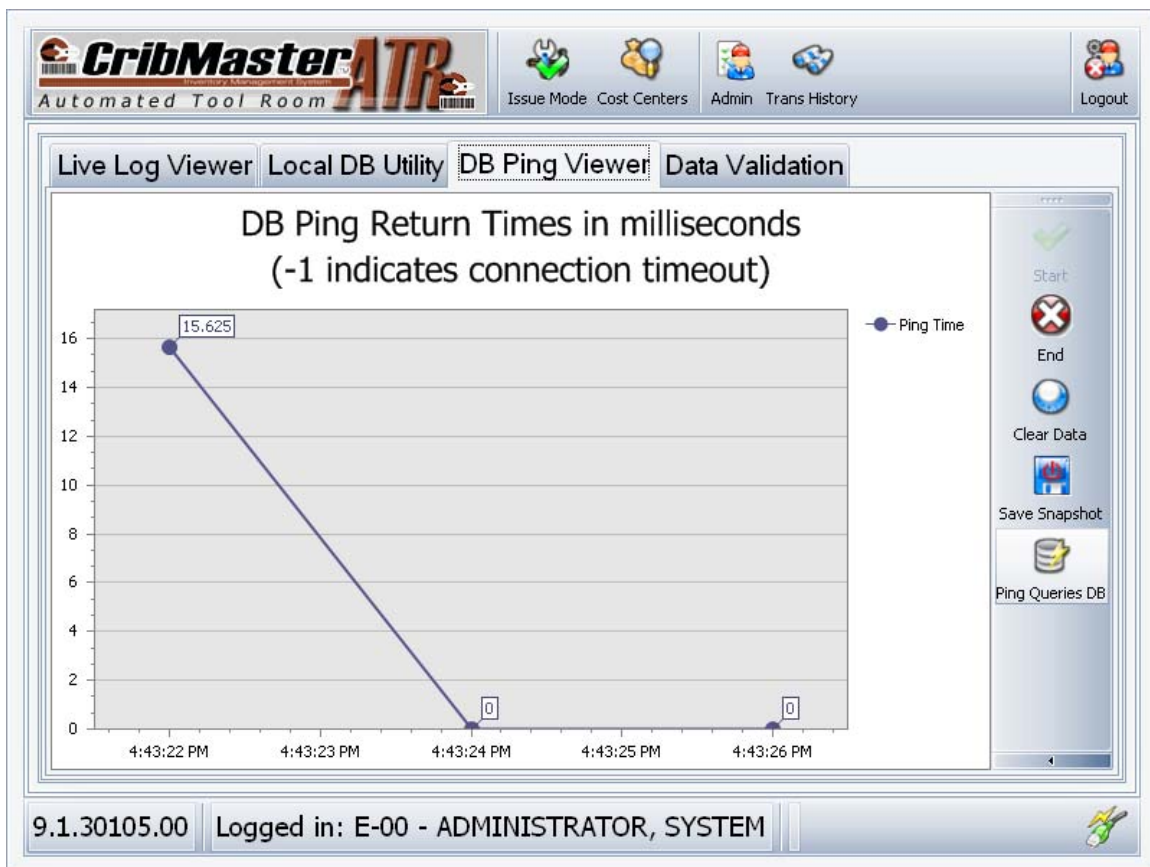
 Open Database	Touch this button to open a local database.
 Delete Uploaded	Touch this button to delete the records of uploaded transactions.
 Delete Failed	Touch this button to delete the records of failed transactions.

 Delete Pending	Touch this button to delete the records of pending transactions.
 Delete All	Touch this button to delete the records of all transactions.






Using the DB Ping Viewer

The DB Ping Viewer allows you to view a record of the consistency of connection between ATR and the CribMaster database.

To access the DB Ping Viewer, touch **Admin > Diagnostics > DB Ping Viewer** tab. The DB Ping Viewer displays:



The following buttons are available on the DB Ping Viewer tab:

 Start	Touch this button to begin pinging the database.
 End	Touch this button to stop pinging the database.
 Clear Data	Touch this button to remove the record of previous pings.
 Save Snapshot	Touch this button to save a screen print of the current window.
 Ping Queries DB	Touch this button to have the application query the database at every ping.