Using AdvantageWeb

CribMaster User Guide

CRIBMASTER USER GUIDE

Using AdvantageWeb

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Table of Contents

Chapter 1: Understanding AdvantageWeb

AdvantageWeb is a web-based front end interface for CribMaster Advantage environments. With AdvantageWeb, all a user needs is a web browser and login to run reports and perform administrative functions. This is especially helpful for company representatives that need to make changes while at a customer site.

Chapter 2: Setting Up AdvantageWeb

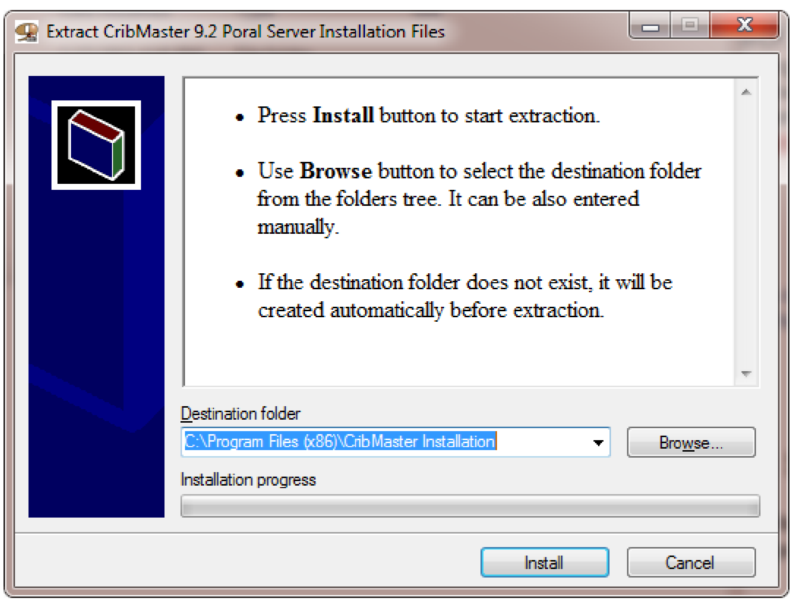
Installing AdvantageWeb

AdvantageWeb is installed using the CribMaster Portal Installer. This document assumes the installation is taking place on a Web Server or a computer with Internet Information Services (IIS) version 6 or higher installed.

Running the CribMaster Portal Installer

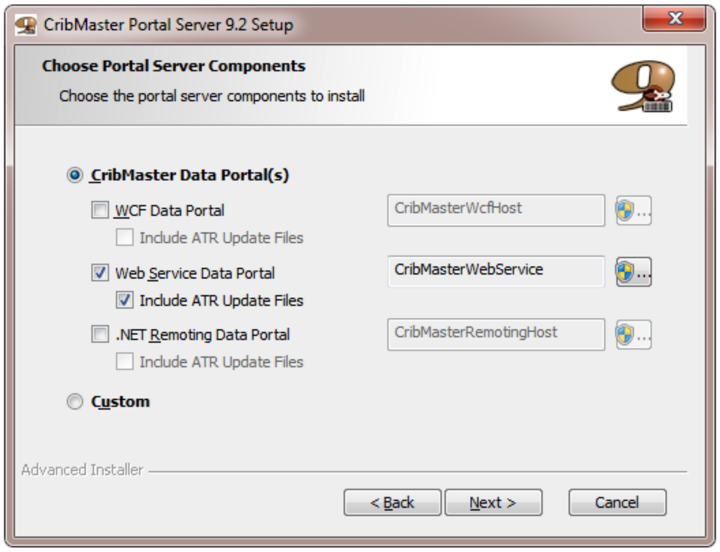
To run the CribMaster Portal Installer to install AdvantageWeb, follow the steps below:

1. Download the 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:

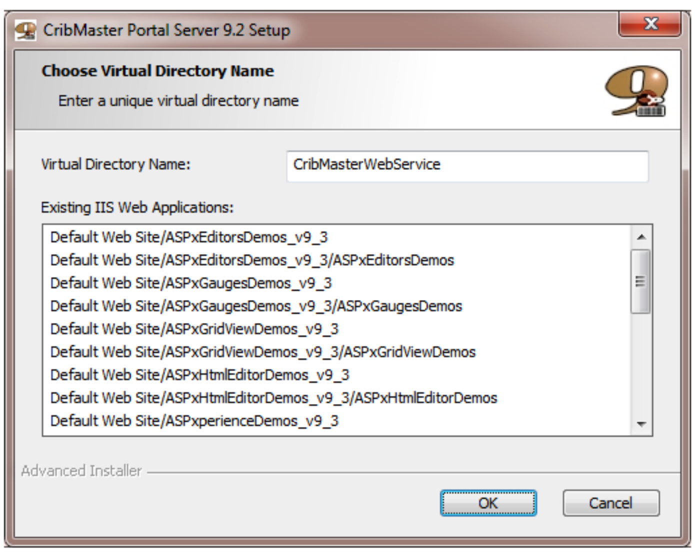


3. Enter or select a **Destination folder**.
4. Click **Install**. The files are extracted into the selected destination folder and the Portal Server setup will automatically launch.
5. Click **Next**.
6. Select **I accept the terms in the license agreement**.
7. Click **Next**. The *Select\Create your 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.
   - To create a new web site, enter a name for it.
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:

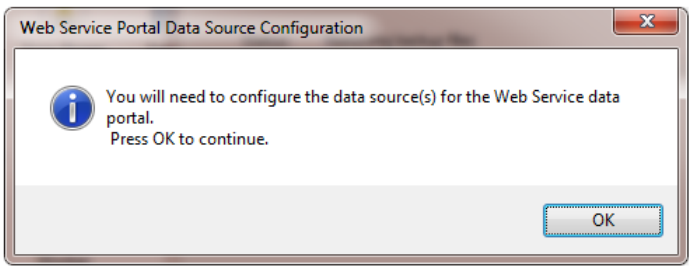


Using the list to avoid entering a duplicate name, enter the **Data Portal Name** you want to use in the blank. Click **OK** to return to the Portal Server Type dialog box.

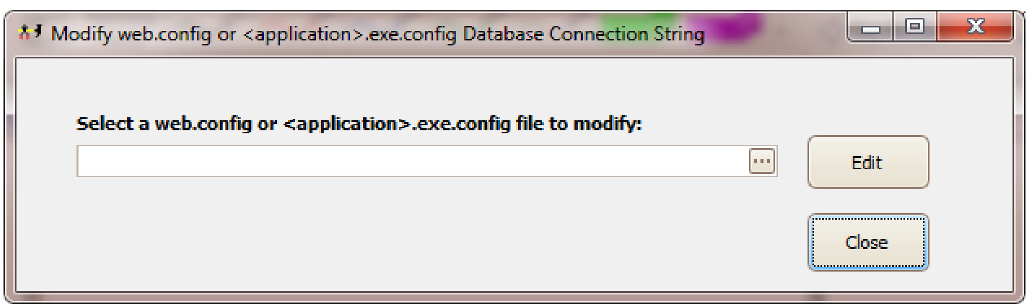
10. On the Portal Server Type dialog box, select **Custom**.
11. Select **AdvantageWebApp**.

    TIP: When you select **AdvantageWebApp**, the AdvantageWeb Name field enables. Click [...] to create a unique name for the instance of AdvantageWeb.

12. Click **Next**.
13. Click **Install**. The application installs. The following prompt displays:

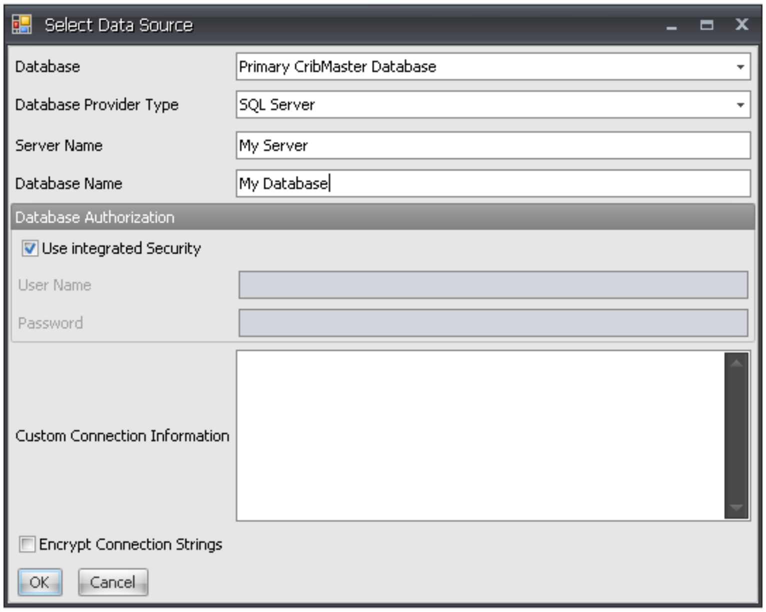


14. Click **OK** to continue. The *Modify web.config Database Connection String* dialog box displays:

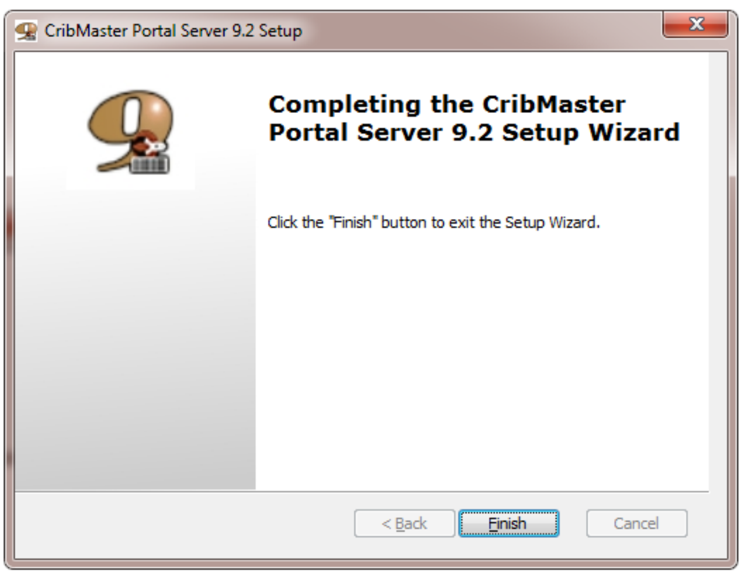


NOTE: The Web.config file should be selected by default. If it is, skip to step 18.

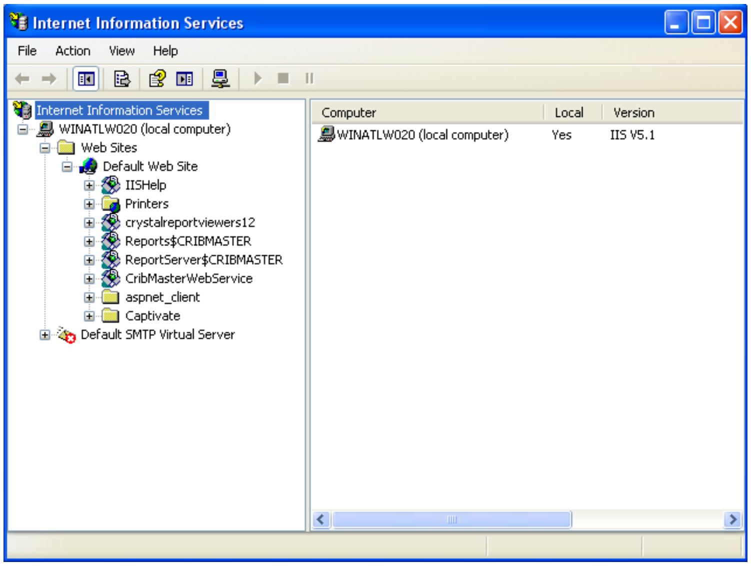
15. Click the browse button [...]. The Open dialog box displays.
16. Select **Web.config**.
17. Click **Open**. The file is selected:
18. Click **Edit**. The Select Data Source dialog box displays:



19. Ensure the type of **Database** is *Primary CribMaster Database*.
20. Select Web Service as your **Database Provider Type**.
21. Enter the **Web Service URL**.
22. Click **OK**. The Modify web.config Database Connection String dialog box displays again.
23. Click **Close**. The following dialog box displays:



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



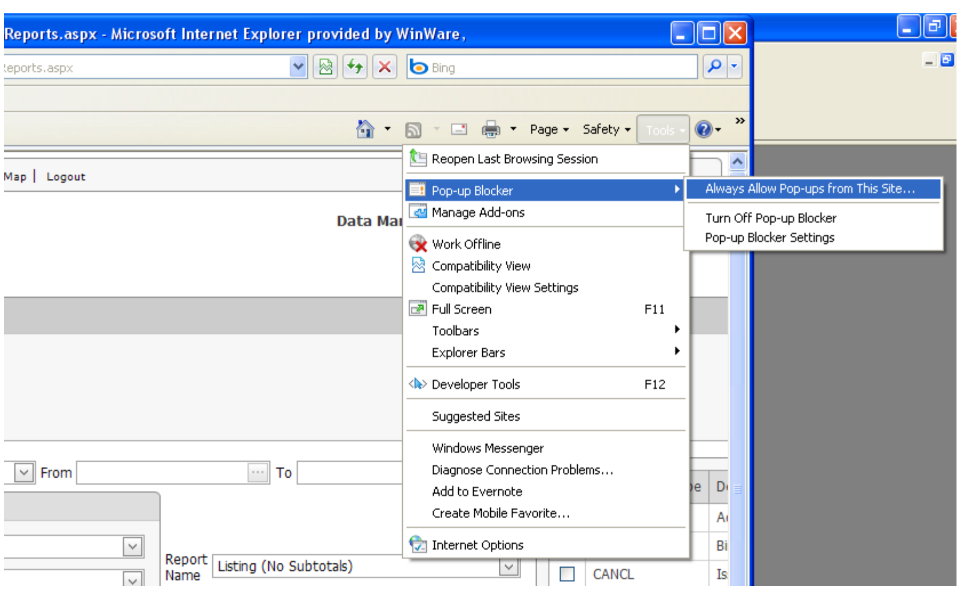
Disabling the Pop-up Blocker

If the web browser you are using to access AdvantageWeb uses a pop-up blocker, that feature must be disabled for AdvantageWeb.

Disabling Pop-up Blocker in Internet Explorer

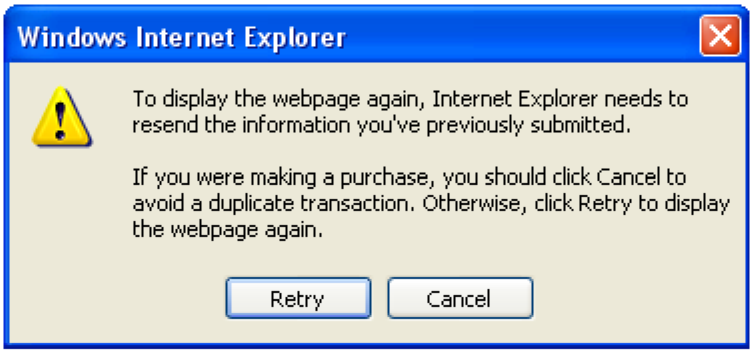
NOTE: This topic addresses Internet Explorer 8.

1. Ensure you have AdvantageWeb loaded and in focus.
2. Click **Tools > Pop-up Blocker > Always Allow Pop-ups from This Site**.



The following prompt displays:

3. Click **Yes**. The following prompt displays:

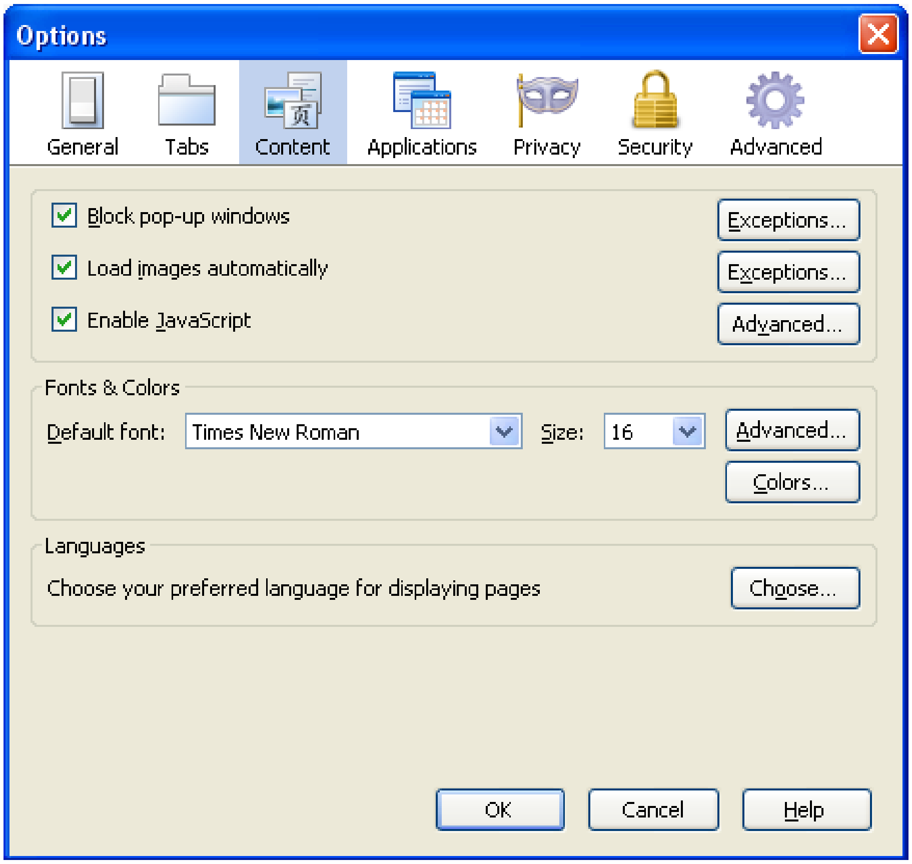


4. Click **Retry**. The page refreshes.

Disabling Pop-up Blocker in Mozilla Firefox

NOTE: This topic addresses Mozilla Firefox 3.5.

1. From within Firefox, click **Tools > Options...** The Options dialog box displays.
2. Click the **Content** tab. The Content tab displays:



3. Click the first **Exceptions...** button next to Block pop-up windows. The Allowed Sites - Pop-ups dialog box displays:

4. In the field for Address of web site, enter or paste the URL for AdvantageWeb.
5. Click **Allow**.
6. Click **Close**.

Chapter 3: Working with Advantage Sites

As an AdvantageWeb user, depending on your rights, you may have the option of logging into any one of multiple Sites Profiles. Each Site Profile represents a CribMaster installation.

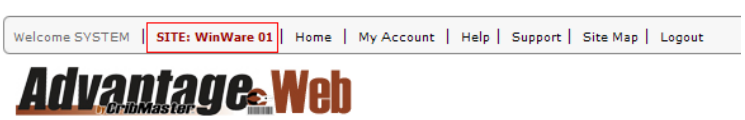
Features of Site Profiles

- One central set of user-defined fields.
- Reports that can be run using site profiles as criteria:
  - Bin
  - Employee
  - Transaction
  - Receipt
  - Reservation
  - Items Checked Out
  - Serialized Item
  - Purchase Order Detail
  - Pending Purchase Orders
  - Transfer
  - User-Defined Fields
- The ability to limit employees' access to certain ATRs.

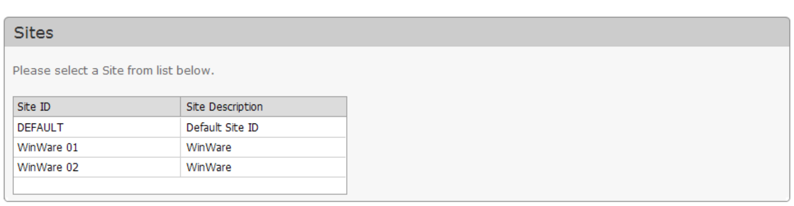
NOTE: The DEFAULT site ID can be assigned to an employee to give that user the ability to log in to any ATR.

Using the Sites Screen

You can access the Sites Screen and change your site by clicking the SITE link in the top navigation bar:



Select a site from the list:



Chapter 4: AdvantageWeb Basics

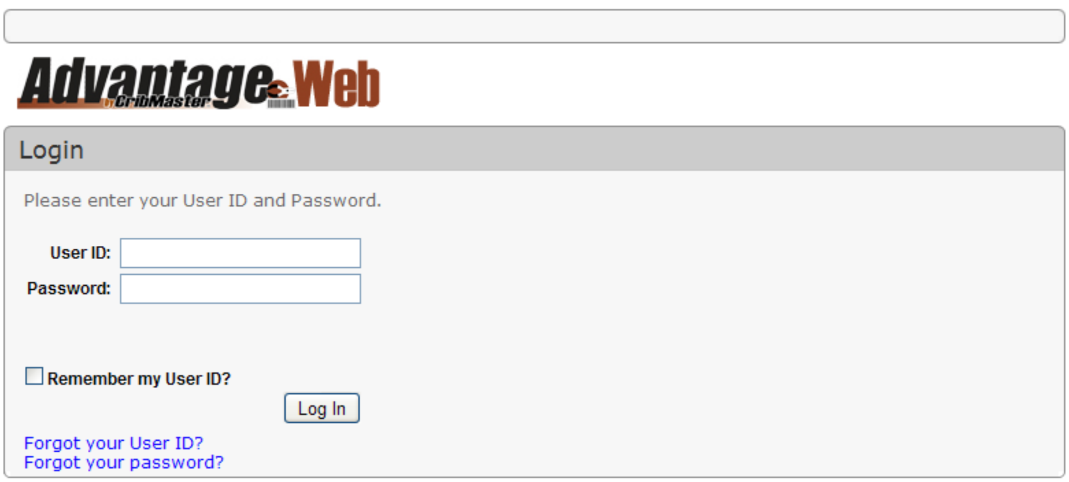
Logging In

Users must log in to AdvantageWeb. Log in credentials in AdvantageWeb are the same as in CribMaster.

Logging in to CribMaster Web

To log in to AdvantageWeb, follow the steps below:

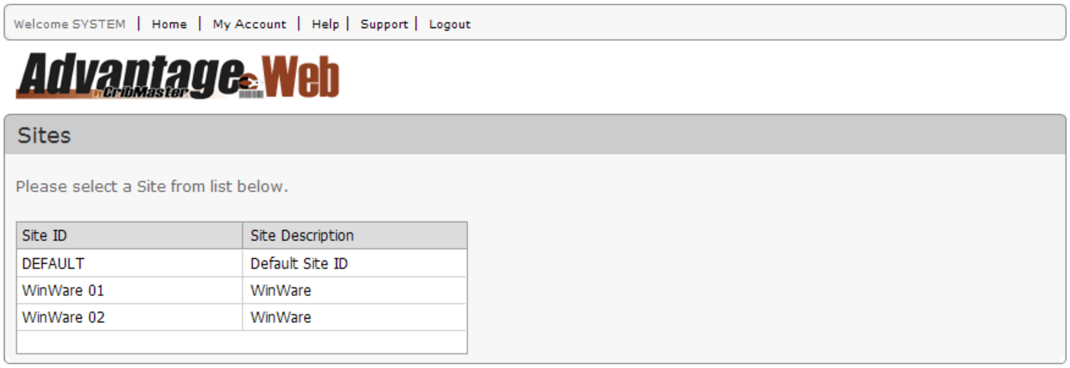
1. Navigate to the URL of AdvantageWeb. The login screen displays:



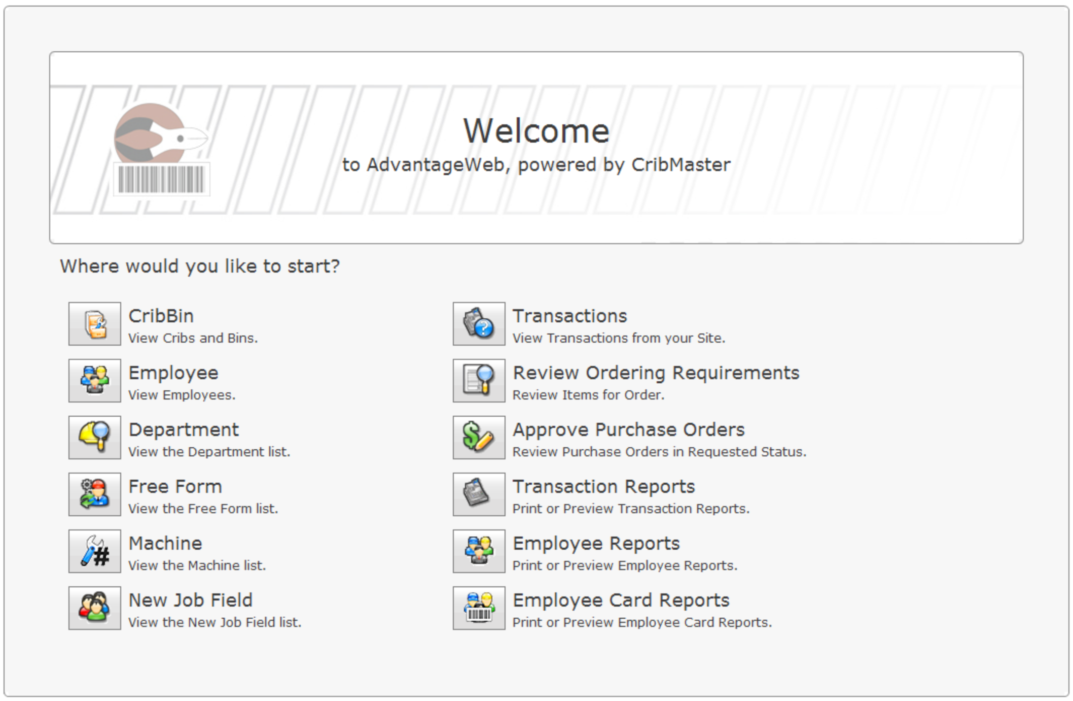
3. Enter your **User ID**.
4. Enter your **Password**.

TIP: Check Remember my User ID? to have the User ID field auto populate whenever the user returns to this page.

5. Click **Log In**. The Site Selection screen displays:



6. Select a site. The system logs in to the home page:



Logging Out

It is important, especially in areas open to the public, to log out of AdvantageWeb when it is not in use.

Logging out of AdvantageWeb

To log out of Advantage Web, click **Logout** from anywhere in AdvantageWeb:

The system returns to the login screen.

Retrieving a Lost Password

If you have forgotten your password, there are two ways to retrieve it:

- You can retrieve it from the Log In screen. This is the fastest way but it is only possible if your email address is in the database.
- Your administrator can reset it for you. This is necessary if your email address is not in the database.

Retrieving a Lost Password from the Log In Screen

If you have forgotten your password, click **Forgot your password?** to retrieve it. The password retrieval screen displays:

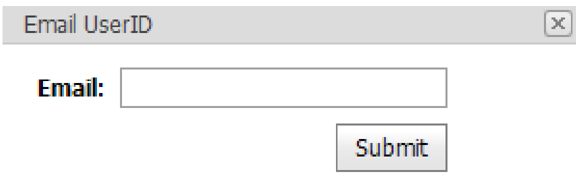
1. Enter the code provided.

   TIP: If you cannot make out the code provided, click **Show another code** to get a new one.

2. Enter your **User ID**.
3. Enter your **Email**.
4. Click **Submit**. The password will be e-mailed to you.

Retrieving a Lost User ID

If you cannot remember your User ID, click **Forgot your User ID?**. A dialog box displays:



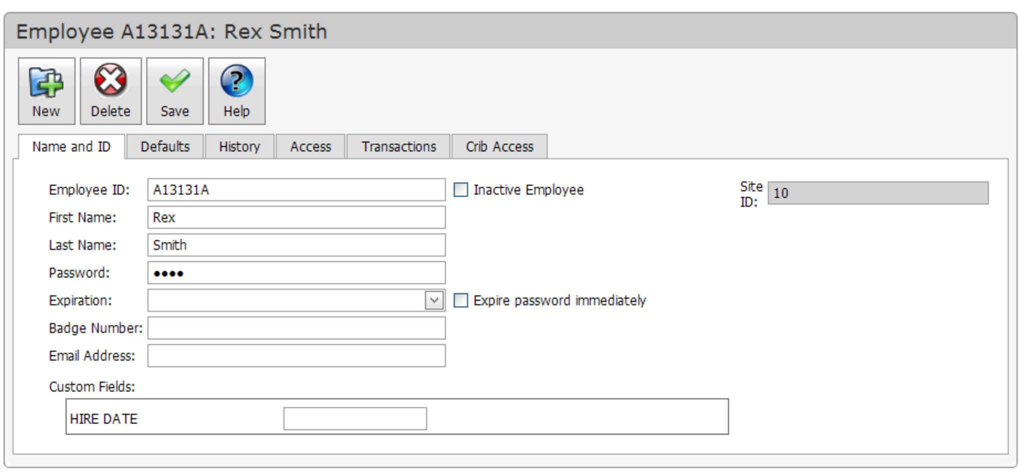
Enter your Email and click **Submit**.

Resetting a Password for an Employee

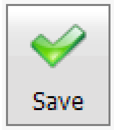
If the employee's email address is not in the database, you can reset their password from within AdvantageWeb.

To reset an employee's password, follow the steps below:

1. Login to Advantage Web.
2. Click **Employee**. The Employee screen displays.
3. Click the Empl. ID of the employee you want to edit. The employee's property page displays:



4. Enter a new password.

5. If necessary, check **Expire password immediately** to force the employee to change their password when they log in.
6. Click **Save** 

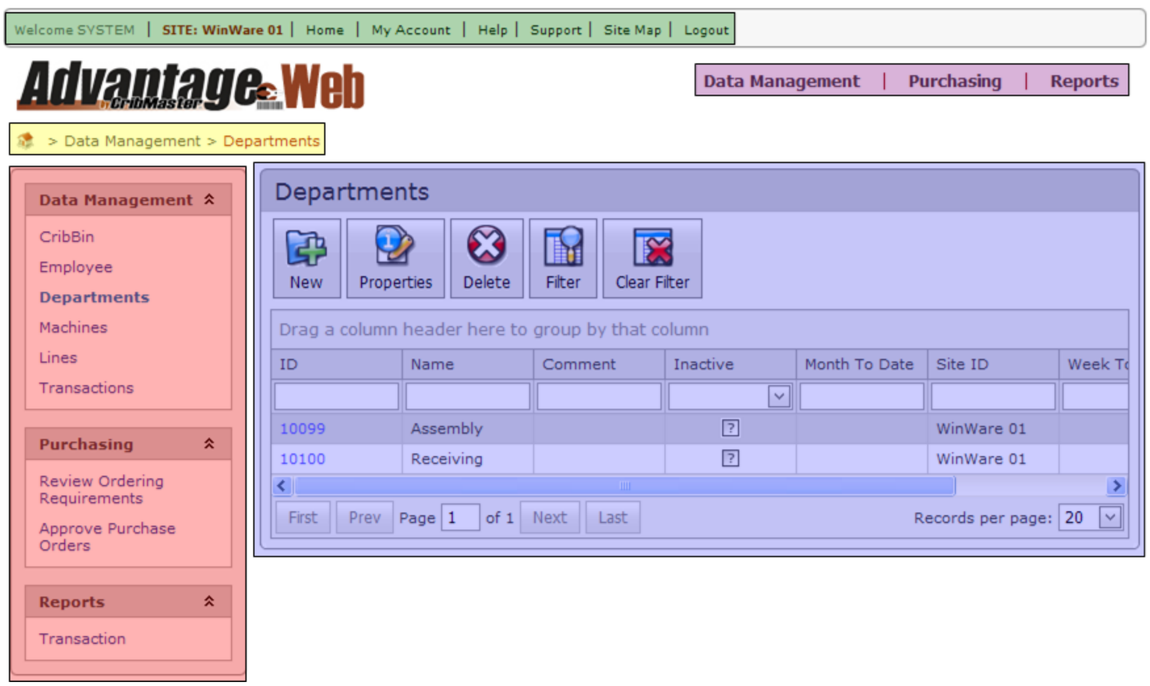
. The changes are saved.

Navigating in AdvantageWeb

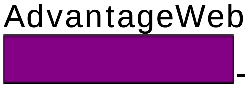
Advantage Web is laid out like many popular web sites.

AdvantageWeb Screens

Many of the screens in AdvantageWeb are arranged like the screen below:



- This menu bar contains links to many functions within AdvantageWeb.

- This menu bar contains links to the various data screens within AdvantageWeb.

- This "bread crumb" menu allows the user to backtrack to previous screens.

- This side menu contains links to the various data screens within AdvantageWeb.

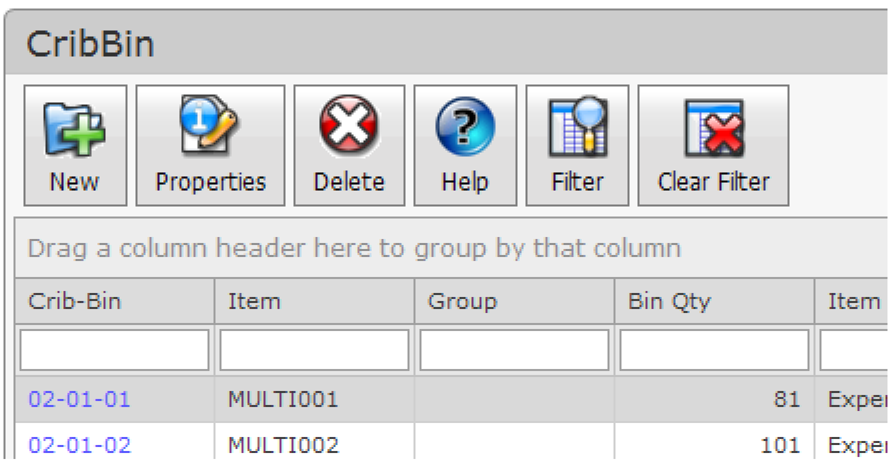
- This main area displays the data that is requested.

Searching and Sorting Records

AdvantageWeb features records screens on which data can be filtered and sorted.

Sorting Records

Many records screens feature a blank that can be used to sort the columns:

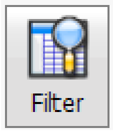


Type a value into the blank to sort the column.

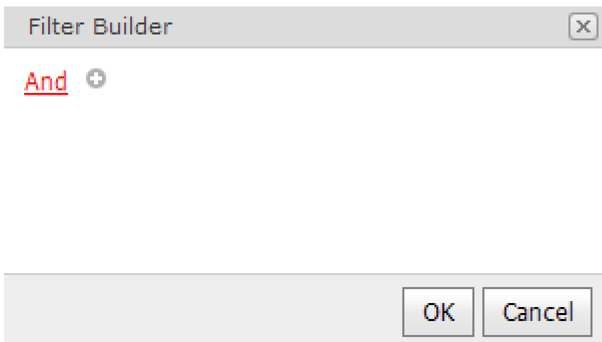
To reset the column, delete the value from the blank.

Creating a Filter

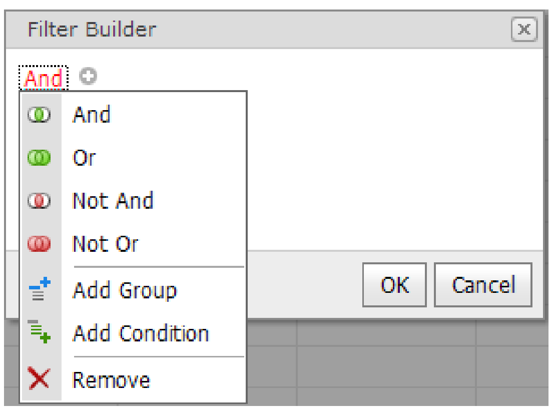
You can create a complex filter to access a subset of data on most records screen.

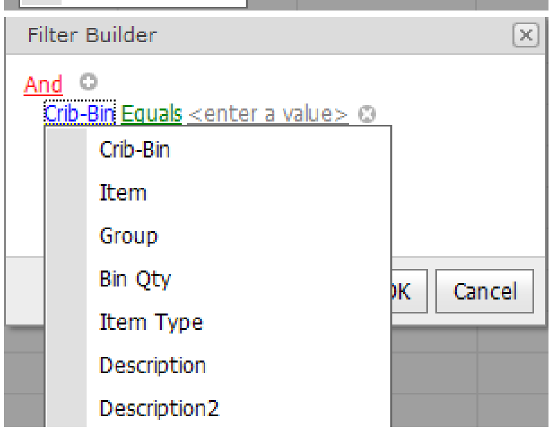
1. Click 

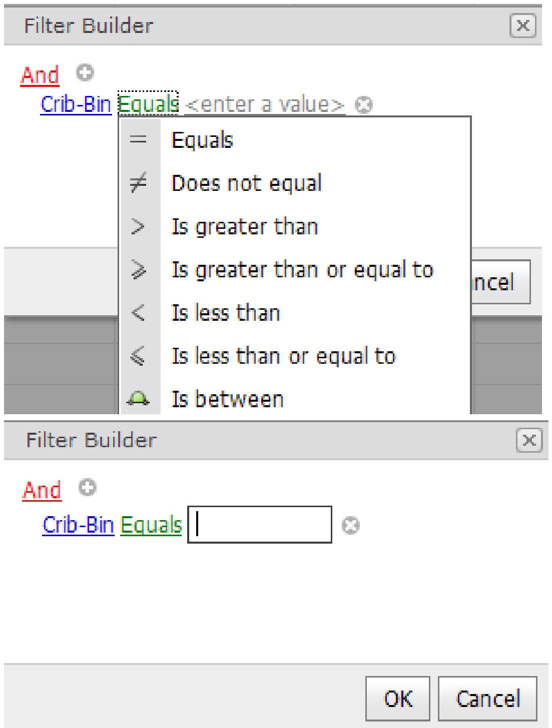
. The filter builder dialog box displays:



2. Click any of the variables and operators to build your query:



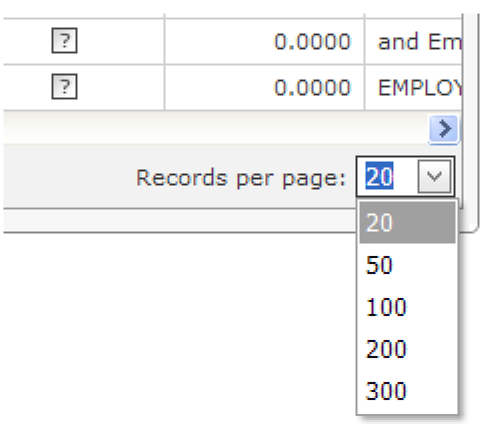




4. Click the at the top to add additional conditions.
5. Click the next to a condition to remove it from the query.
6. Click **OK** to finish the filter.

Loading Records

On many records screens, you can adjust the number of records that display on the page. In the lower right corner, use the drop-down to set the number of records per page:

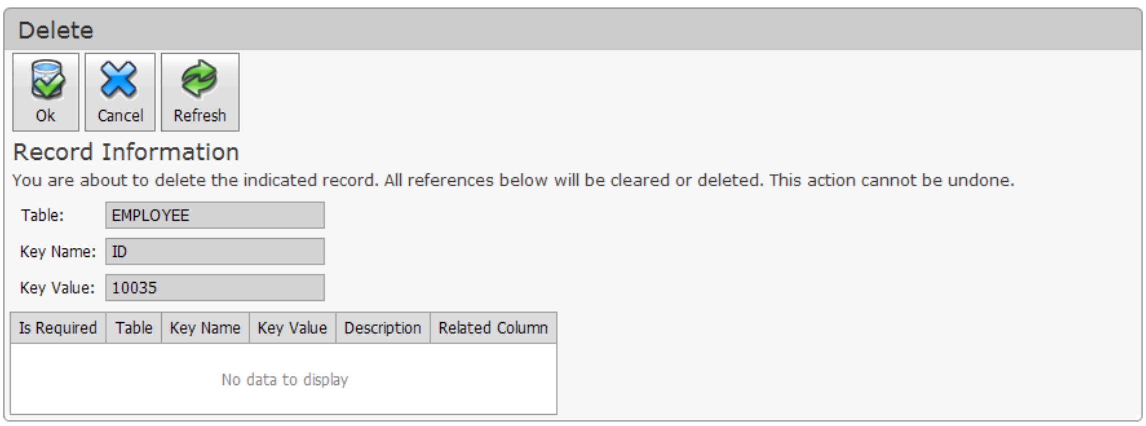


Deleting Records

Records can be deleted from various screens from within AdvantageWeb.

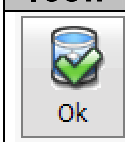
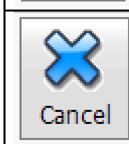
Deleting a Record

When deleting a record, the system will check for any references to that record in the database:



Elements of the Delete Screen

The following table illustrates the function of each icon:

Icon	Function
	Click this button to continue with deletion.
	Click this button to cancel deletion.
	Click here to get an updated view of database references.

If there are no indications of the record in other tables, you can continue with the delete.

Chapter 5: Data Management

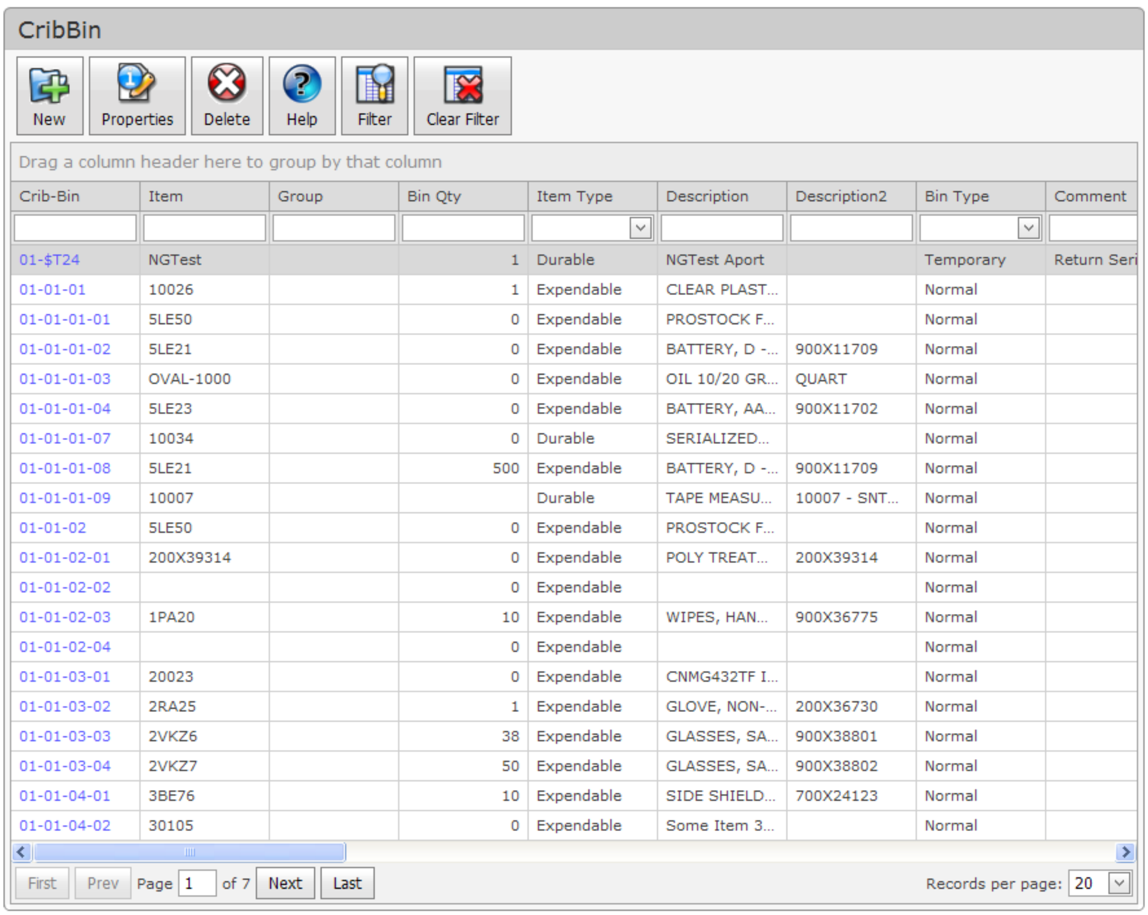
The CribBin Screen

The CribBin screen allows the user to view and interact with bin data.

Accessing the CribBin Screen

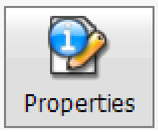
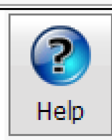
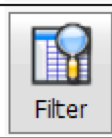
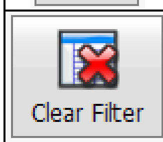
To access the CribBin Screen, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Bin**. The Bin screen displays:



Elements of the CribBin Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new bin.
	Click here to access the properties of the selected bin. **TIP:** You can also access bin properties by clicking the hyper linked CribBin number.
	Click here to delete the selected bin.
	Click here to access the online help.
	Click here to create a query for bins meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

Crib-Bin - This field displays the ID of the crib and bin.
Item - This field displays the item that is associated with the bin.
Group - This field displays the inventory group for the selected item.
Bin Qty - This field displays the amount of the item currently in the bin.
Item Type - This is going to be one of the following:

- 0 Expendable - This is a disposable item that is not expected back after it is issued.
- 1 Reworkable - This is a consumable item that can be reground, recycled or reused.
- 2 Durable - This is an item that can be used more than once and is expected back after it is used.

3 Gauge - This is a tool that requires calibration after a certain length of time or number of uses.
4 Kit - This is a grouping of individual tools placed together as a single issue.

Description - This field displays the description of the item.
Description2 - This field displays any additional information about the item.
Bin Type - This field displays the type of bin: normal, primary, secondary, or temporary bin types. Primary and secondary bin types are used with item-centric ordering. The temporary bin type is used with transfer tracking.
Comment - This field displays any additional information about the bin.
Mfr # - This field displays the number of the manufacturer of the item.
Manufacturer - This field displays the name of the manufacturer of the item.
Primary CribBin - This field displays the primary bin (if the bin is used for item-centric ordering).
Stop Ordering - If the Stop Ordering check box is checked on the Order Information tab of the Bin Properties dialog box, Yes displays in this field.
Inactive - If the Remove from active item list check box is checked on the Bin Information tab, Yes displays in this field.
Stop Issue - If the Stop Issue check box is checked on the Bin Information tab, Yes displays in this field.
Last Recalc Date - This field displays the date the bin was last calculated from the Order Information tab of the Bin Properties dialog box.
Unit of Measure (Issue) - This field displays the way the selected item is issued.
Avg Lead Time (Days) - This is CribMaster’s computed Average Lead Time. This is displayed for information even if an override has been entered.

NOTE: The Average Lead Time is computed from all orders of the item from the primary supplier within the last year. When the primary supplier for an item is changed, the Average Lead Time is recalculated.

Capacity - This is the maximum capacity for this bin.
Consignment - This filed denotes whether or not the bin is a consignment bin.
Critical Point - This is the quantity level used for sending critical alerts.
Fill Bin To Qty (MAX) - This is an optional override of the order calculations for this bin only. If a number is entered in this field in

CribMaster, the system will order enough of this item to bring the quantity up to this number.
Monthly Usage (Override) - Overrides will be used for this field if entered in CribMaster.
On Order - This is quantity on order. The On Order quantity also includes pending Transfers where this bin is the Bin To Bin. When the transfer is completed, the On Order amount attributed to the transfer will be removed.
Order Now - This is the quantity CribMaster has computed to order. CribMaster has decided it is time to order this item and this is the quantity it has determined to order. Most of the numbers on this page affect this number. You can override some of the values and press Cal Now to see the new results in this field. Bins with a quantity in this field will be listed on the Authorize Purchasing dialog box. This is a calculated number and is displayed for information only.
Order Point (Override) - To use a min/max ordering system, the Order Point Override would be used for the Min and the Fill Bin To Quantity for Max.
Order Quantity (Override) - Overrides will be used for this field if entered in CribMaster.
Pending Rework - This is the quantity for this bin that is in a pending rework status. This should only apply to reworked items.
Safety Stock (Override) - This is an override entered on the Order Information tab of bin properties that overrules the computer-generated Safety Stock figure.

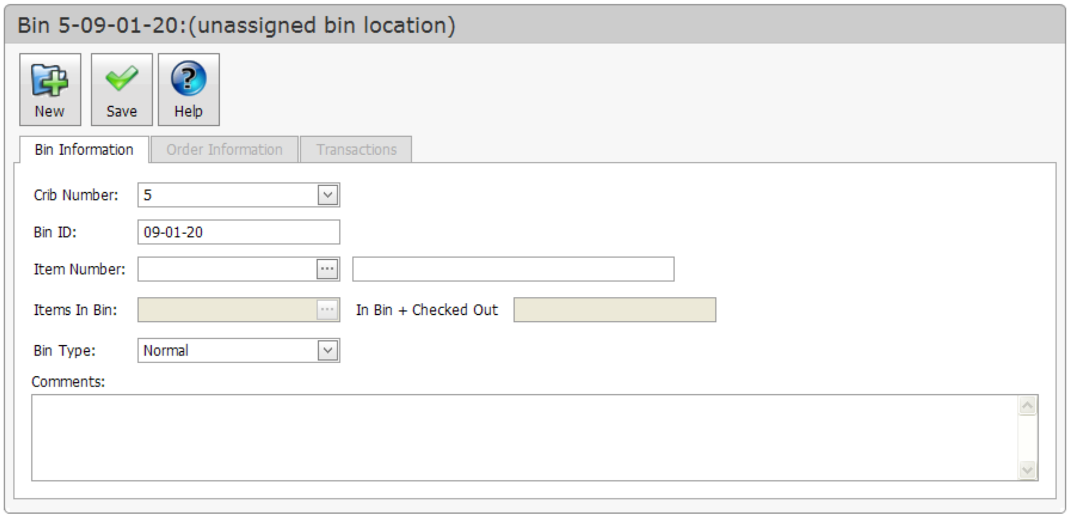
Adding a Bin

New bins can be created on the CribBin screen.

To create a new bin, follow the steps below:

1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. Click **New** 

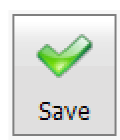
. The New Bin page displays:



4. Select a **Crib Number** from the drop-down.
5. Enter a **Bin ID**.
6. Do one of the following:
   - Type in an Item Number.
   - Click **Browse** () to select an item.
7. Enter the bin quantity in the **Items In Bin** field.
8. Select a **Bin Type** from the drop-down. Select from normal, primary, secondary, or temporary bin types.

   NOTE: Primary and secondary bin types are used with item-centric ordering.

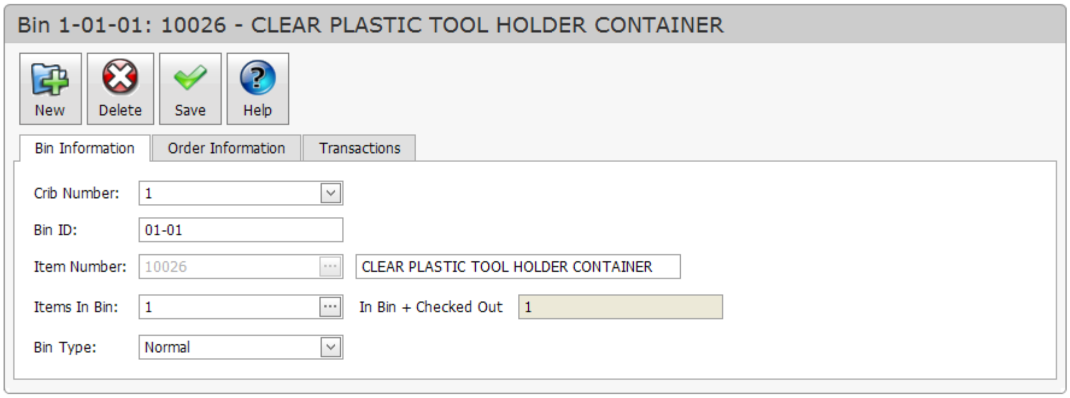
   NOTE: Temporary bin type is used with transfer tracking.

9. When all of the information is entered, click **Save** 
.

Editing a Bin

To edit an existing bin, follow the steps below:

1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the bin number of the bin you want to edit. The bin's property page displays:



5. Make any changes you need to make.
6. Click **Save** . The changes are saved.

Deleting a Bin

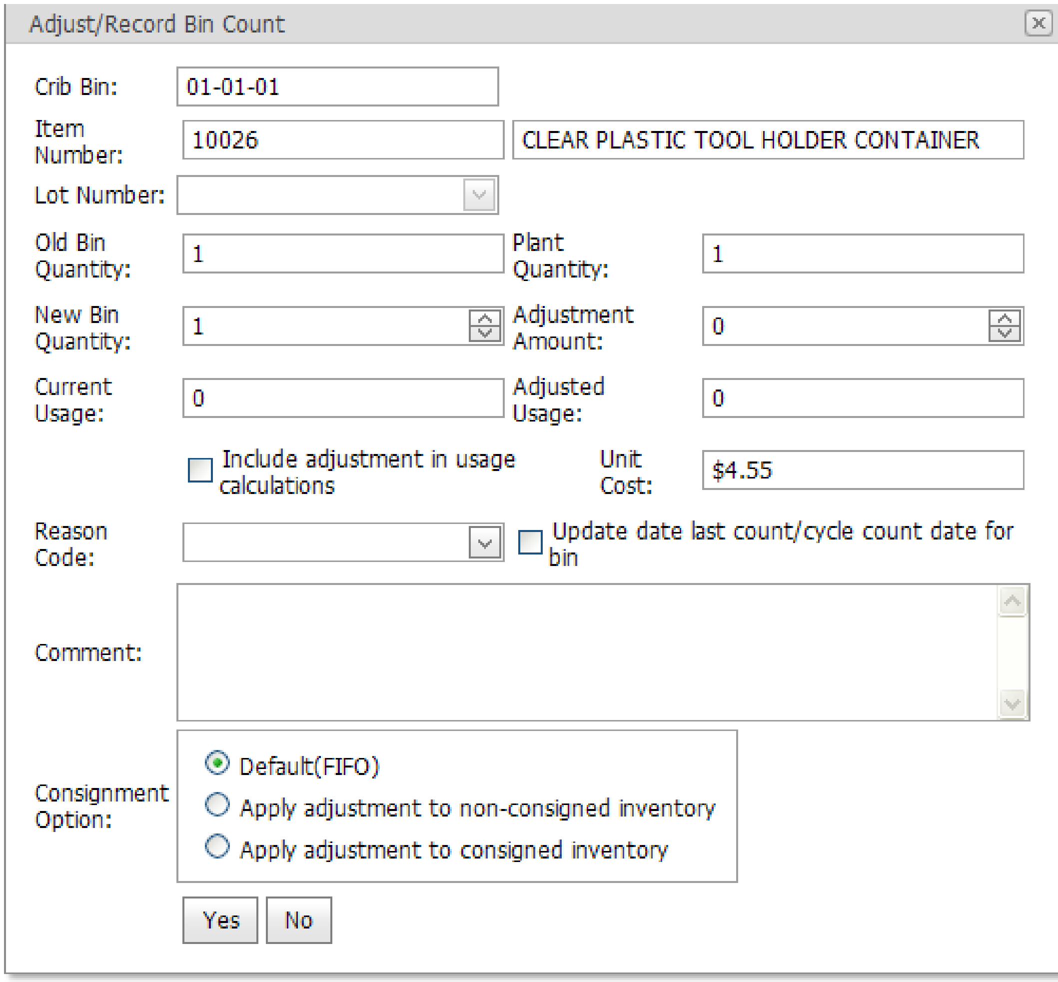
To delete an existing bin, follow the steps below:

1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the line of the bin you want to delete.
5. Click **Delete** . The bin is deleted.

Adjusting a Bin's Quantity

To adjust the recorded number of items, follow the steps below:

1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the bin number of the bin you want to edit. The bin's property page displays. The Bin Information Tab is in focus by default.
5. Next to **Items in Bin**, click the ellipses (). The Adjust/Record Bin Count dialog box displays:



<u>Crib Bin</u> - The number of the crib/bin in which the bin to be adjusted is located.
<u>Item ID</u> - Item number of the item currently assigned to the bin. The item description is shown next to the item number.
<u>Lot Number</u> - You can specify which lot to include in the adjustment.
<u>Old Bin Quantity</u> - This is the item count for the bin before the current adjustment.
<u>Plant Quantity</u> - This is the old item count for the bin plus any items that are checked out.
<u>New Bin Quantity</u> - The item count for the bin after the adjustment.
<u>Adjustment Amount</u> - This is the computed difference between the new and old quantities.
<u>Current Usage</u> - This is the current usage level for the bin.
<u>Adjusted Usage</u> - This is the computed adjusted usage for the bin.

NOTE: This will only be different from the current usage if the Include adjustment checkbox is checked.

Include adjustment in bin usage calculations - Indicates whether the adjustment to the bin quantity should also be included in the bin usage.

NOTE: Changes to the bin quantity have the opposite effect on usage: if you add items to the bin, then you have actually used fewer of the items than previously indicated. You would un-check this box in situations where it is clear that the adjustment to the bin is not usage related. For example, you might use Inventory Reconciliation to generate initial bin counts when CribMaster is being used for the first few times. In this case, the old bin count (probably 0) is meaningless and you would not want to include the adjustment in the usage.

Unit Cost - This is the cost per individual unit.
Reason Code - This is the code that explains the need for bin count adjustment.
Update Date Last Counted / Cycle Count for bin - Used with Cycle Counting, check this box to adjust the records from the last cycle count.
Comment - This is a space for any additional information about the adjustment.
Consignment Adjustment Option - These options are used to alter the count based on consignment inventory.
Default (FIFO) - Apply the count to all items.
Apply adjustment to non-consigned inventory - Apply count only to non-consigned inventory.
Apply adjustment to consigned inventory - Apply count only to consigned inventory.

6. Enter the **New Bin Quantity**.
7. Make any other needed changes.
8. Click **Yes** to save.

Bin Properties

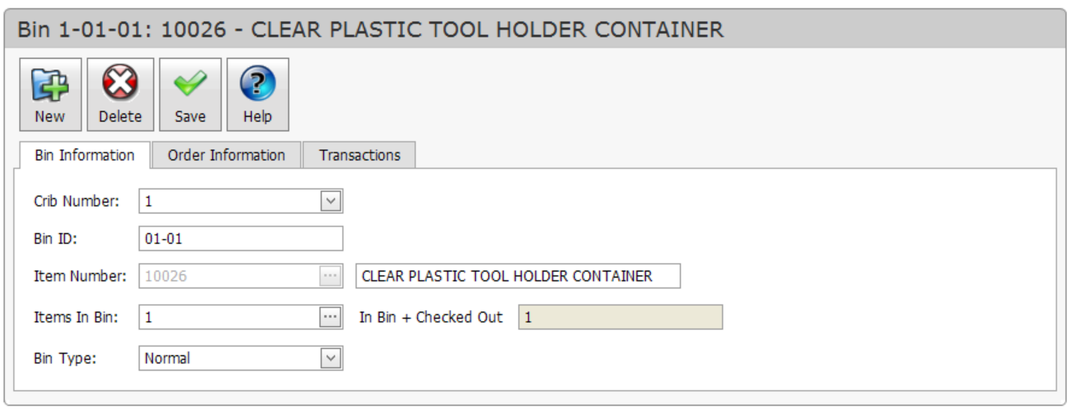
The Bin Information Tab

The Bin Information Tab contains the most critical information about the bin.

Accessing the Bin Information Tab

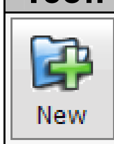
To access the Bin Information Tab, follow the steps below:

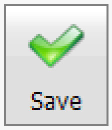
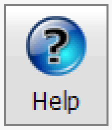
1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the bin number of the bin you want to edit. The bin's property page displays. The Bin Information Tab is in focus by default:



Elements of the Bin Information Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new bin.
	Click here to delete the selected bin.

	Click here to save changes.
	Click here to access the online help.

Crib Number - This is the Crib where this bin is located.
Bin ID - This is the ID for this bin.
Item Number - This is the ID of the item kept in this bin.
Items In Bin - This is the quantity of items in the bin.
In Bin + Checked Out - This is the Bin Quantity plus all items checked out and expected to be returned. This number is different from Bin Quantity for Reworkable items, Durable items, and Gauges.

> **NOTE:** For Reworked stock this field also includes items that are pending rework.

Bin Type - This is normal, primary, secondary, or temporary.

> **NOTE:** Primary and secondary bin types are used with item-centric ordering.

> **NOTE:** Temporary bin type is used with transfer tracking.

The Order Information Tab

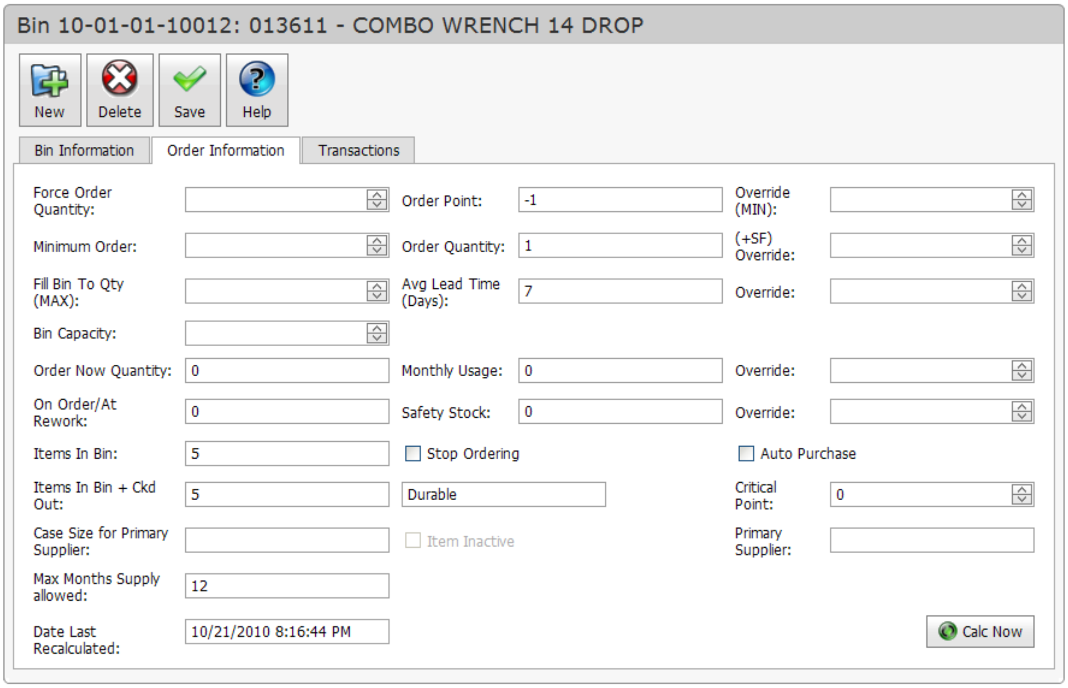
The order information tab is where a user can define how inventory is ordered for the selected bin.

Accessing the Order Information Tab

To access the Order Information Tab, follow the steps below:

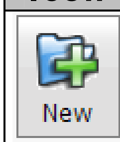
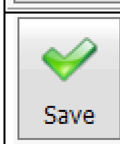
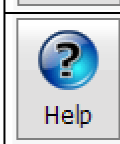
1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the bin number of the bin you want to edit. The bin's property page displays. The Bin Information Tab is in focus by default.

5. Click **Order Information**. The Order Information Tab displays:



Elements of the Order Information Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new bin.
	Click here to delete the selected bin.
	Click here to save changes.
	Click here to access the online help.

<u>Force Order Quantity</u> - Enter a quantity here to force CribMaster to order it when the bin is recalculated.

NOTE: This will cause CribMaster to place this quantity into the Order Now field.

NOTE: The bin must be saved before the force order quantity takes effect.

NOTE: The actual order does not occur until either Auto Purchase produces Purchase Orders or someone manually produces Purchase Orders with the Authorize Purchasing dialog. When an order is placed, this field will be cleared and an On Order amount will appear. If at a later viewing the quantity is still present in the Force Order field, you may change or remove the number and order calculations will return to normal processing.

Minimum Order - Enter a minimum quantity to order for this bin. This is an optional minimum for this bin only. If there is also a minimum supplied on the Supplier tab of the Inventory properties, CribMaster will order enough to cover the larger of the two minimums. This can be useful if the item is being ordered from multiple suppliers with different minimums.
Fill Bin To Qty (MAX) - This is an optional override of the How Much to Order calculations for this bin only. If a number is entered in this field, CribMaster will order enough of this item to bring the quantity up to this number.
Bin Capacity - This is an optional maximum capacity for this bin. If you enter a number here, CribMaster will not order stock to overflow this quantity.
Order Now Quantity - This is the quantity CribMaster has computed to order. CribMaster has decided it is time to order this item and this is the quantity it has determined to order. Most of the numbers on this page affect this number. You can override some of the values and press Cal Now to see the new results in this field. Bins with a quantity in this field will be listed on the Authorize Purchasing dialog box. This is a calculated number and is displayed for information only.
On Order/At Rework - If the item in this bin is a reworked item, the quantity displayed here is quantity at rework, otherwise it is quantity on order. The On Order quantity also includes pending Transfers where this bin is the Bin To Bin. When the transfer is completed, the On Order amount attributed to the transfer will be removed.
Pending Rework - This is the quantity for this bin that is in a pending rework status. This should only apply to reworked items.
Items In Bin - This is the count of items currently in the bin and available to be issued.

Items In Bin + Ckd Out - If item-centric order is turned off, this will be the Bin Quantity plus all items checked out and expected to be returned. If item-centric order is turned on, this will be the Primary and Secondary quantities plus items checked out.

> **NOTE:** This number is different from Bin Quantity for Reworkable items, Durable items, and Gauges.

> **NOTE:** For Reworked stock this field also includes items that are pending rework.

Case Size for Primary Supplier - This is the purchasing case size from Item Properties. This field is used for ordering quantities.
Max Months Supply allowed - This is the number of months supply allowed based on the crib options setting.
Date Last Recalculated - This is the last time the bin was calculated.
Order Point - This is CribMaster's computed order point for this bin. This is displayed for information even if an override has been entered. Overrides will be used if entered.

> **NOTE:** Order Point = MonthlyUsage * AverageLeadTime + Safety Stock.

> **NOTE:** For reworked items where the option to Combine with rework for ordering calculations has been chosen, the order point will be larger because the monthly usage is larger. However, the quantities compared to the order point are also combined so it is like having one bin that is larger in usage and stock available to be used.

Order Point Override - To use a min/max ordering system, use the Override of Order Point for the Min and the Fill Bin To Quantity for Max.
Order Quantity - This is CribMaster's computed order quantity. This is displayed for information even if an override has been entered. Overrides will be used if entered.
Order Quantity Override - Overrides will be used for the above field if entered.
Avg Lead Time (Days) - This is CribMaster's computed Average Lead Time. This is displayed for information even if an override has been entered.

> **NOTE:** The Average Lead Time is computed from all orders of the item from the primary supplier within the last year. When the

primary supplier for an item is changed, the Average Lead Time is recalculated.

Avg Lead Time (Days) Override - Overrides will be used for the above field if entered.
Max Lead Time (Days) - This is CribMaster's computed Maximum Lead Time. This is displayed for information even if an override has been entered.
Max Lead Time (Days) Override - Overrides will be used for the above field if entered.
Monthly Usage - This is CribMaster's computed Monthly Usage. This is displayed for information even if an override has been entered.

NOTE: The Monthly Usage is calculated with the information from the Usage Information tab.

NOTE: For reworked items where the option to Combine with rework for ordering calculations has been chosen, the combined usage (new usage + reworked usage) is displayed.

Monthly Usage Override - Overrides will be used for the above field if entered.
Safety Stock - This is CribMaster's computed Safety Stock. This is displayed for information purposes even if an override has been entered.
Safety Stock Override - Overrides will be used for the above field if entered.
Stop Ordering - Check this box to prevent CribMaster from automatically computing an Order Now quantity for this item.

NOTE: You can still add this bin to a Purchase Order using the Add Item button on the Authorize Purchasing dialog box.

Item Type Description - This is the type of item associated with the bin.
Item Inactive - This field denotes whether or not the item was removed from the active item list.
Auto Purchase - Items that are designated "auto purchase" have purchase orders generated automatically for this bin.
Critical Point - This is the quantity level used for sending critical alerts.
Primary Supplier - This is the recommended supplier of the item.
Calc Now - Click this button to recalculate the values on this property page.

NOTE: It is useful to see the effects of changes you make.

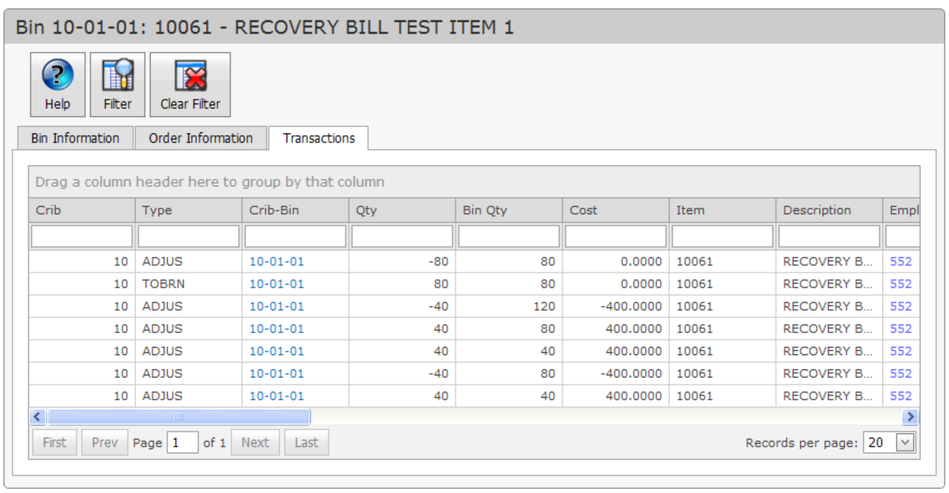
The Transactions Tab

The Transactions Tab displays details about transactions involving the selected bin.

Accessing the Transactions Tab

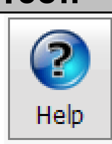
To access the Transactions Tab, follow the steps below:

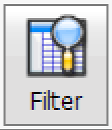
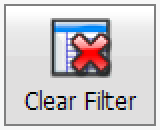
1. Login to AdvantageWeb.
2. Click **CribBin**. The CribBin screen displays.
3. If necessary, expand the crib in which the bin you want to edit is stored.
4. Click the bin number of the bin you want to edit. The bin's property page displays.
5. The Bin Information Tab is in focus by default.
4. Click **Transactions**. The Transactions Tab displays:



Elements of the Transactions Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to access the online help.

	Click here to create a query for transactions meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

Crib - This is the crib in which the transaction took place.
Type - This is the type of transaction.
Crib-Bin - This is the CribBin in which the transaction took place.
Qty - This is the number of items involved in the transaction.
Bin Qty - This is the number of items left in the bin after the transaction.
Cost - This is the dollar amount used in performing the transaction.
Item - This is the item involved in the transaction.
Description - This is a description of the item.
Empl ID - This is the user ID of the employee that performed the transaction.
Issued To ID - In the case of an Issue Transaction, this is the user ID of the item recipient.
Date - This is the date the transaction took place.
Serial ID - If the item involved in the transaction is serialized, this is the serial ID of the item.
Usage Item Number - In transactions involving reservations, this is the substitute item number.
Usage CribBin - In transactions involving reservations, this is the substitute CribBin.
Other CribBin - This depends on the type of transaction:

- ISSRT - Contains the Return To CribBin if different
- RECVE - Contains Rework bin if Receive New As Rework Option is Enabled for this item
- TRACK - Contains the final destination bin

WO Seq - This field is populated if the transaction was done against a Work Order.
Batch - If the item is part of batch scan, the ID appears in this column.
Expected Accuracy (%) - This is the expected accuracy of the cycle count.
Site No. - This is the name of the Site Profile involved with the transaction.
No. - This is the database record of the transaction.

User (1-6) - If a user-defined field was used during the transaction, it is listed here.

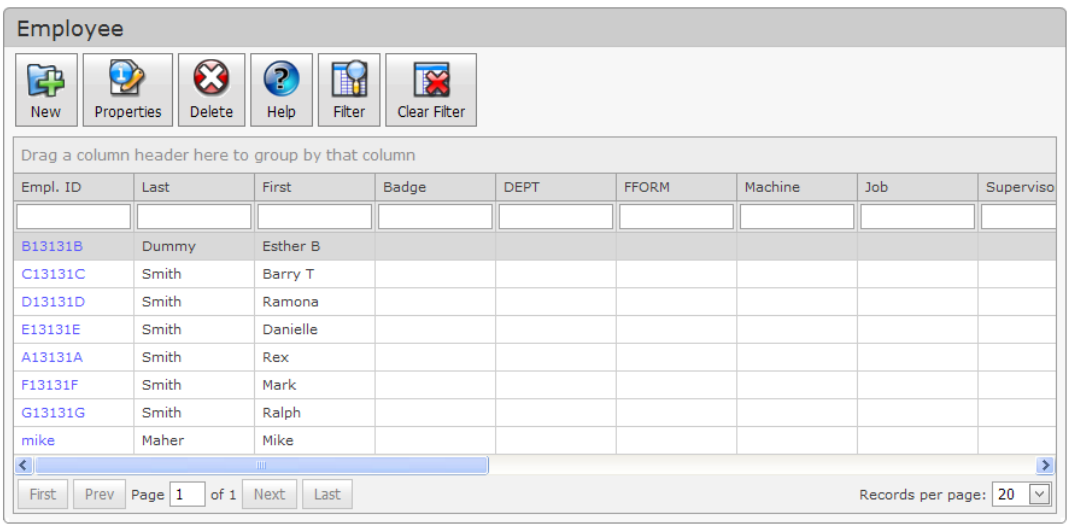
The Employee Screen

The Employee screen allows the user to view and interact employee data.

Accessing the Employee Screen

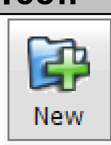
To access the Employee Screen, follow the steps below:

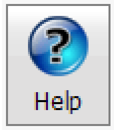
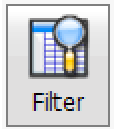
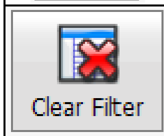
1. Login to AdvantageWeb.
2. Click **Employee**. The Employee Screen displays:



Elements of the Employee Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to add an employee.
	Click here to access the properties of the selected employee. **TIP:** You can also access employee properties by clicking the hyper linked Empl. ID. number.

	Click here to delete the selected employee.
	Click here to access the online help.
	Click here to create a query for employees meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

Empl. ID - This is the ID of the selected employee.
Last - This is the last name of the selected employee.
First - This is the first name of the selected employee.
Badge - This is the badge number of the selected employee (if applicable).
User (1-6) - These columns display the default selections for each field.
Supervisor - This is the name of the supervisor of the selected employee.
Inactive - A "1" in this column means the employee is inactive, prohibiting access.
FOD Control - This level sets whether or not an employee is designated as FOD (Foreign Object Debris). Anything above a "0" enables CheckOut records and special tracking for F.O.D Expendable and Returnable items issued to FOD Employees:

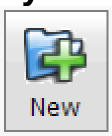
- 0 - None - This is no FOD limitations.
- 1 - FOD - This is basic FOD limitations.
- 2 - FOD Restricted - With this setting, the employee cannot be selected on the Issue Screen if the current crib assignment of the workstation is not in their list.

Group Account -
Login Disabled - This column denotes whether or not the employee can log in to Advantage Web.
Month-To-Date - This is an accumulation of all items that this employee has checked out in the current month.

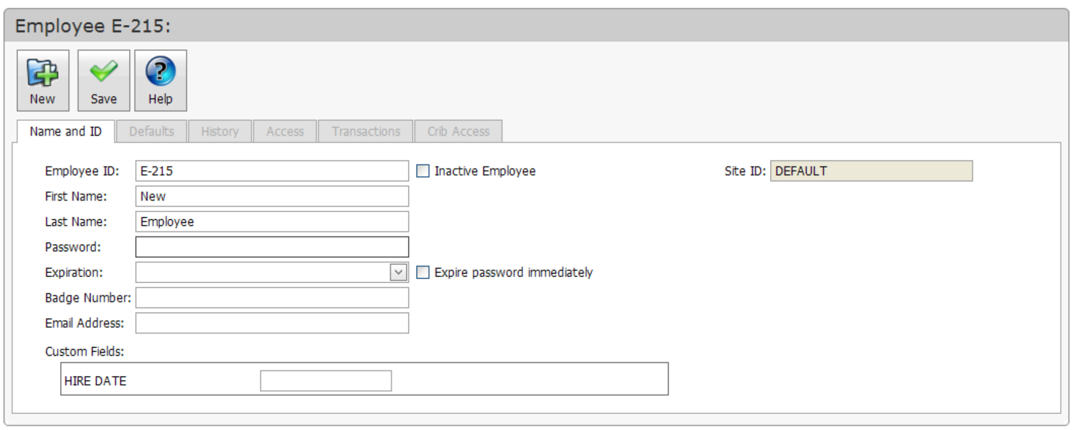
Name - This is the name of the employee.
Site ID - This is the site to which the employee is assigned.
Week-To-Date - This is an accumulation of all items that this employee has used in the current week.
Year-To-Date - This is an accumulation of all items that this employee has checked out in the current year.

Adding an Employee

To create a new employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click **New** 

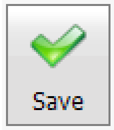
. The New Employee page displays:



4. Do one of the following:
   - Accept the **Employee ID**.
   - Enter a new **Employee ID**.
5. Enter the employee's **First Name**.
6. Enter the employee's **Last Name**.
7. Enter a **Password**.
8. Select an **Expiration** (if necessary).

   TIP: Check **Expire password immediately** to have the system force the employee to change their password when they first log in.

5. Enter a **Badge Number** (if necessary).
6. Enter a **Email Address** (if necessary).

7. Click **Save** 

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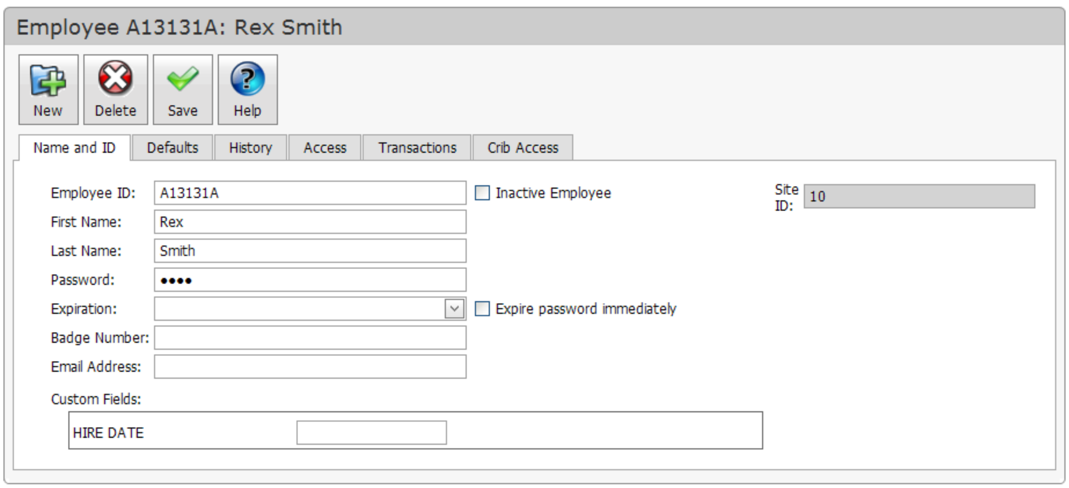
Editing an Employee

To edit an existing employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays:



4. Make any changes you need to make.
5. Click **Save** 

. The changes are saved.

Deleting an Employee

To delete an employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the line of the employee you want to delete.

4. Click **Delete** 

. The Employee is deleted.

Employee Properties

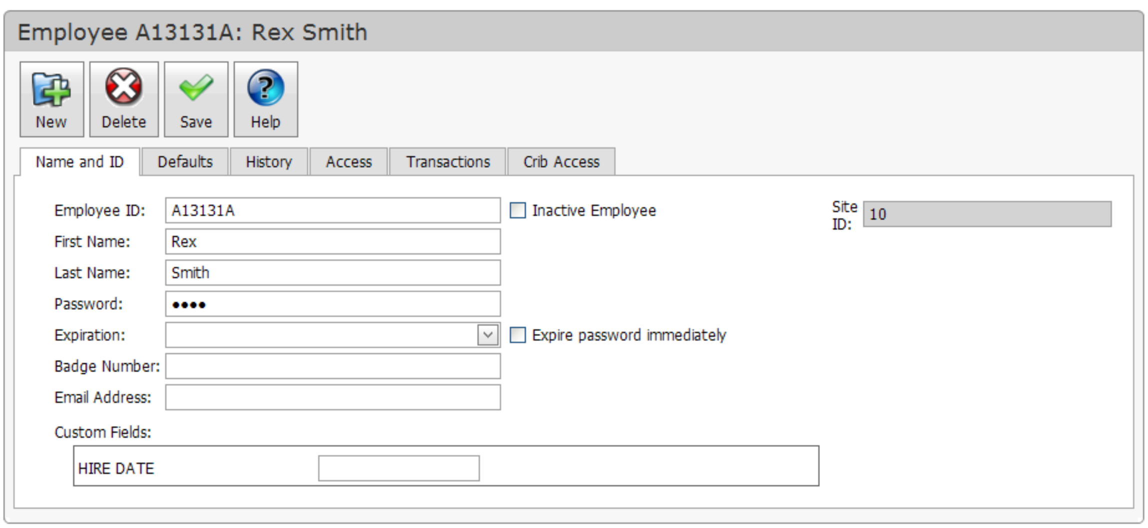
The Name and ID Tab

The Name and ID Tab contains the most critical information about the employee.

Accessing the Name and ID Tab

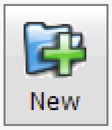
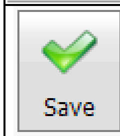
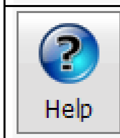
To access the Name and ID Tab of an employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default:



Elements of the Name and ID Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new employee.
	Click here to delete the selected employee.
	Click here to save changes.
	Click here to access the online help.

Fields

Employee ID - This is the identification for the employee.
Inactive Employee - Check this box to disable the selected employee.
Site ID - This is the name of the site profile associated with the selected employee.
First Name - This is the First Name of the selected employee.
Last Name - This is the Last Name of the selected employee.
Password - This is the password the employee uses to access Advantage Web.
Expiration - This is the date the login expires for the selected employee.
Expire password immediately - Check this box to force the employee to change their password the next time they log in.
Badge Number - This is a specific company ID that may differ from the Employee ID.
Email Address - This is the employee's email address.
Custom Fields - These are user-defined fields set up for employees.

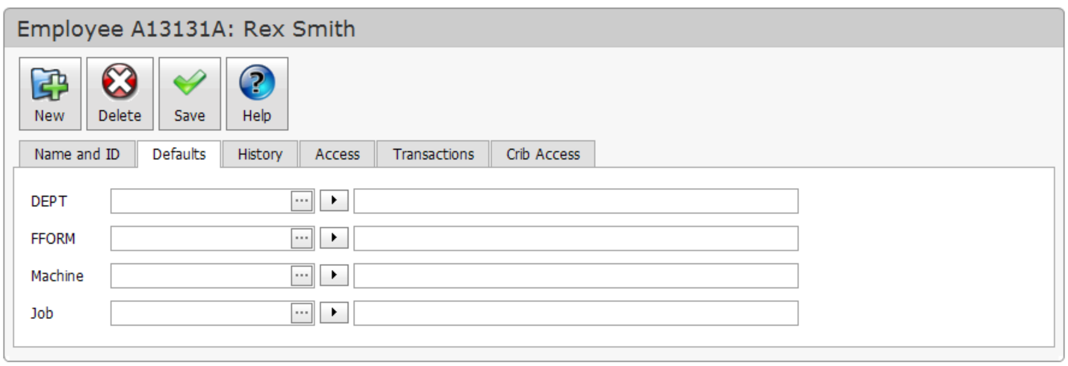
The Defaults Tab

The Defaults Tab contains any default answers the employee may have set up for the database's user-defined fields.

Accessing the Defaults Tab

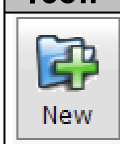
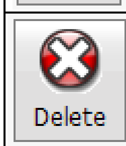
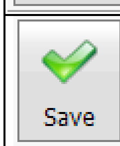
To access the Defaults Tab of an employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default.
4. Click the **Defaults Tab**. The Defaults Tab displays:



Elements of the Defaults Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new employee.
	Click here to delete the selected employee.
	Click here to save changes.

 Help	Click here to access the online help.

Entering Defaults

1. Enter an answer for any User-defined field on the tab to which to default when the employee uses ATR.
2. Click Save  Save.

NOTE: Only those fields that have an entry will default.

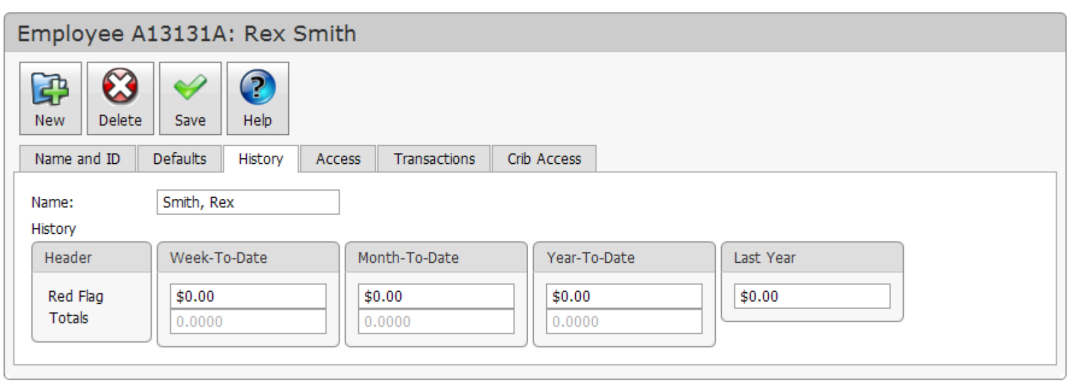
The History Tab

The History Tab displays totals of any costs associated with items issued by the employee.

Accessing the History Tab

To access the History Tab of an employee, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default.
4. Click the **History Tab**. The History Tab displays:



Elements of the History Tab

The following table illustrates the function of each icon:

Icon	Function
New	Click here to create a new employee.
Delete	Click here to delete the selected employee.
Save	Click here to save changes.
Help	Click here to access the online help.

Fields

Name - This is the concatenated last and first name of the employee.
Totals - Week-To-Date - This is an accumulation of all items that this cell has used this week.
Totals - Month-To-Date - This is an accumulation of all items that this employee has checked out this month.
Totals - Year-To-Date - This is an accumulation of all items that this employee has checked out this year.
Red Flag Amounts - If the Total amount exceeds the Red Flag amount for any of the time periods, an entry will appear on the Red Flag report.
Last Year - At the end of each year, the Year-To-Date figure is stored in the Last Year field and the Year-To-Date field is cleared for the new year.

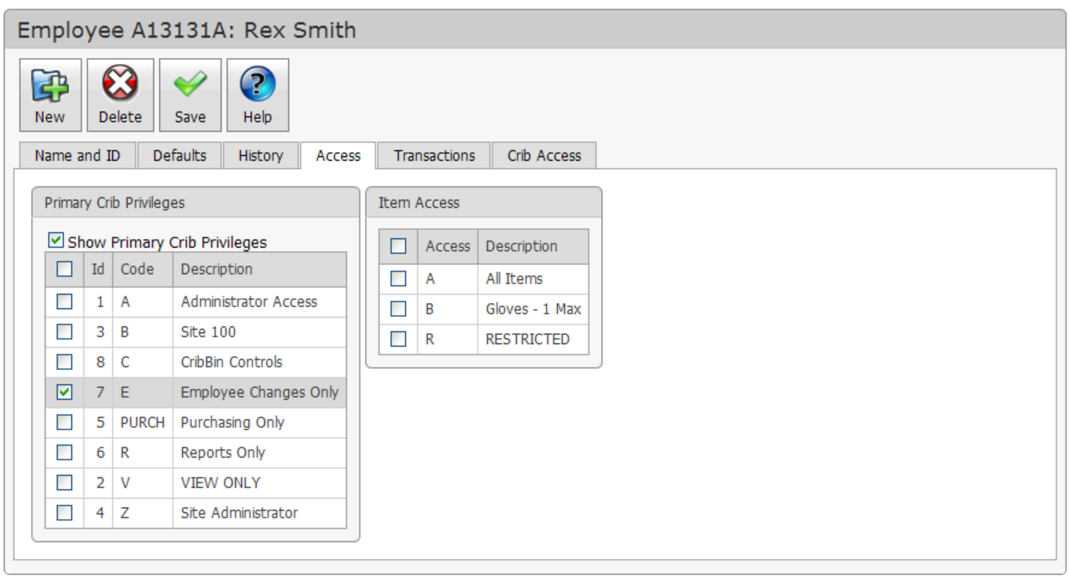
The Access Tab

The Access Tab is used to assign the security levels for employees. It allows you to set access to the CribMaster System and item access for each employee.

Accessing the Access Tab

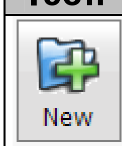
To access the Access Tab of an employee, follow the steps below:

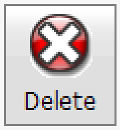
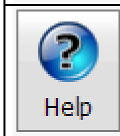
1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default.
4. Click the **Access** tab. The Access tab displays:



Elements of the Access Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new employee.

	Click here to delete the selected employee.
	Click here to save changes.
	Click here to access the online help.

Fields

Primary Crib Privileges - This list shows the CribMaster security groups. Select the security groups for this employee by checking the box or boxes next to each group granted to the employee.

> **TIP:** These groups are entered on the Security Access Codes dialog box in CribMaster.
>
> Show Non-Primary Privileges - Check this box to toggle the view between primary and non-primary privileges.
>
> > NOTE: This option is only available if the option "Enable separate security privileges for primary and non-primary cribs" is selected on the Options > Configuration tab in CribMaster.
>
> Id - This is the database identifier of the security access code.
> Code - This is the security code itself.
> Description - This is a field that describes the security access code.

Item Access - This list shows the item access codes. Select codes for each employee by checking the box next to each access group.

> **TIP:** These groups are entered on the Item Access Codes dialog box.
>
> **TIP:** For more information on Item Access, see Understanding Item Access Codes.
>
> > Access - This is the access code.
> > Description - This is a field that describes the access code.

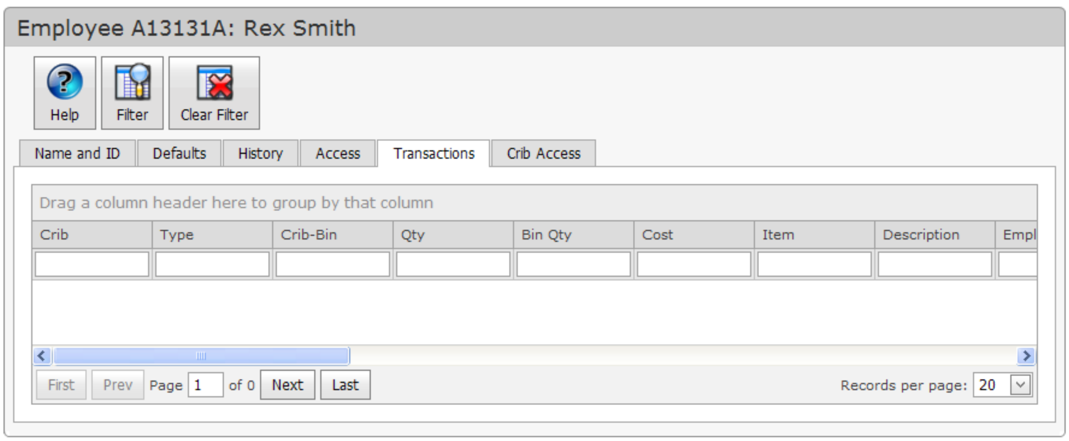
The Transactions Tab

The Transactions Tab displays details about transactions involving the selected employee.

Accessing the Transactions Tab

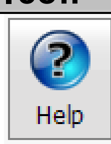
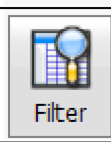
To access the Transactions Tab, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default.
4. Click the **Transactions** tab. The Transactions tab displays:



Elements of the Transactions Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to access the online help.
	Click here to create a query for transactions meeting specific criteria.

	Click here to remove the active search criteria.

Column Headers

Crib - This is the crib in which the transaction took place.
Type - This is the type of transaction.
Crib-Bin - This is the CribBin in which the transaction took place.
Qty - This is the number of items involved in the transaction.
Bin Qty - This is the number of items left in the bin after the transaction.
Cost - This is the dollar amount used in performing the transaction.
Item - This is the item involved in the transaction.
Description - This is a description of the item.
Empl ID - This is the user ID of the employee that performed the transaction.
Issued To ID - In the case of an Issue Transaction, this is the user ID of the item recipient.
Date - This is the date the transaction took place.
Serial ID - If the item involved in the transaction is serialized, this is the serial ID of the item.
Usage Item Number - In transactions involving reservations, this is the substitute item number.
Usage CribBin - In transactions involving reservations, this is the substitute CribBin.
Other CribBin - This depends on the type of transaction:

- ISSRT - Contains the Return To CribBin if different
- RECVE - Contains Rework bin if Receive New As Rework Option is Enabled for this item
- TRACK - Contains the final destination bin

WO Seq - This field is populated if the transaction was done against a Work Order.
Batch - If the item is part of batch scan, the ID appears in this column.
Expected Accuracy (%) - This is the expected accuracy of the cycle count.
Site No. - This is the name of the Site Profile involved with the transaction.
No. - This is the database record of the transaction.
User (1-6) - If a user-defined field was used during the transaction, it is listed here.

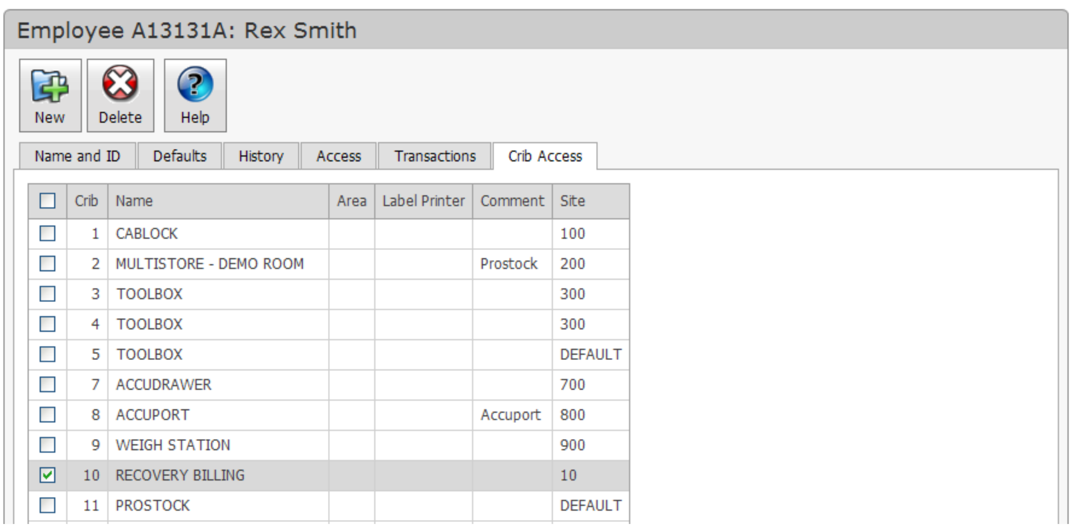
The Crib Access Tab

The Crib Access Tab is used to define an employee's ability to work with particular cribs.

Accessing the Crib Access Tab

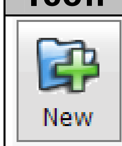
To access the Name and ID Tab of an employee, follow the steps below:

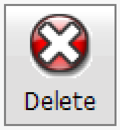
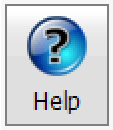
1. Login to AdvantageWeb.
2. Click **Employee**. The Employee screen displays.
3. Click the **Empl. ID** of the employee you want to edit. The employee's property page displays. The Name and ID Tab is in focus by default.
4. Click the **Crib Access** tab. The Crib Access tab displays:



Elements of the Name and ID Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new employee.

	Click here to delete the selected employee.
	Click here to access the online help.

Cribs that are checked are cribs where the employee has primary access. All other cribs are secondary cribs. Primary cribs have a separate set of security permissions than secondary cribs.

Column Headers

Crib - This field displays the ID of the crib.
Name - This field displays the name given to the crib.
Area - This is the area ID assigned to this crib.
Label Printer - This is the assigned printer for this crib.
Comment - This field displays any additional information about the crib.
Site - This field displays the site profile of the crib.

User-Defined Fields

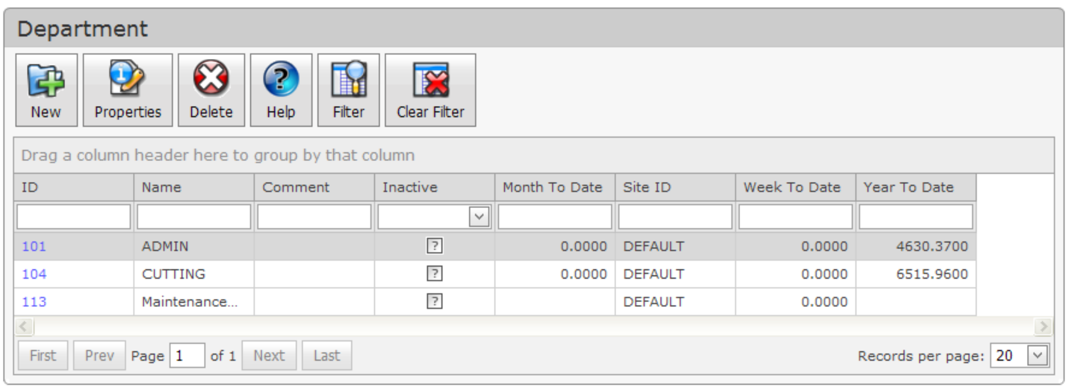
The User-Defined Fields Screen

These screens display the values of any User-Defined fields you may have in your database.

Accessing a User-Defined Field Screen

To access the a User-Defined Field Screen, follow the steps below:

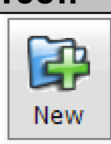
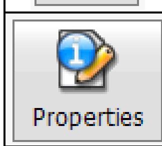
1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays:

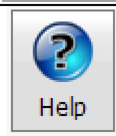
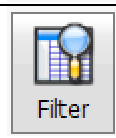


NOTE: In the above screenshot, the User-Defined field is named "Departments."

Elements of the User-Defined Field Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to add a value to the User-Defined field.
	Click here to access the properties of the selected User-Defined field.

	TIP: You can also access employee properties by clicking the hyper linked Empl. ID. number.
	Click here to delete the selected User-Defined field.
	Click here to access the online help.
	Click here to create a query for values meeting specific criteria.
	Click here to remove the active search criteria.

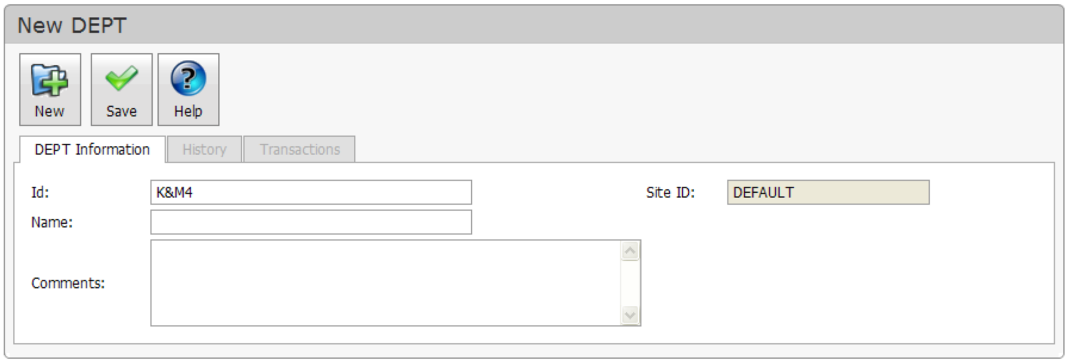
Column Headers

ID - This is the ID of the select user-defined field.
Name - This is the name of the user-defined field option.
Comment - This is a description of the user-defined field option.
Inactive - This column denotes whether or not the selected value can be used.
Month to Date - This is the total for the month involving the selected value.
Site ID - This is the site to which the value is assigned.
Week to Date - This is the total for the week involving the selected value.
Year to Date - This is the total for the year involving the selected value.

Adding a User-Defined Field Value

To create a new value, follow the steps below:

1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Click **New**  . The New Value page displays:

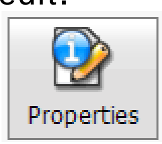


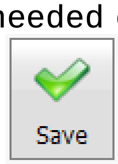
4. Do one of the following:
   - Accept the generated **Id**.
   - Enter a new **Id**.
5. Enter a Name for the value.
6. Enter any Comments or additional information.
7. Click **Save** 

. The new value is created.

Editing a User-Defined Field Value

To edit a User-Defined value, follow the steps below:

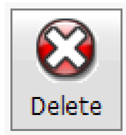
1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Select a value to edit.
4. Click **Properties** 

. The Department Information Tab displays.
5. Make any needed changes.
6. Click **Save** 

. The changes are saved.

Deleting a User-Defined Field Value

To edit a User-Defined value, follow the steps below:

1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Select a value to delete.
4. Click **Delete** 

. The value is deleted.

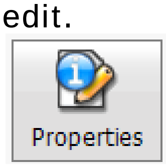
User-Defined Field Properties

The Information Tab

The Information Tab contains basic information about the User-Defined Field value.

Accessing the Information Tab

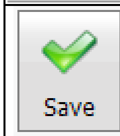
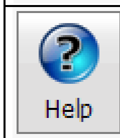
To access the Information Tab, follow the steps below:

1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Select a value to edit.
4. Click **Properties** 

. The Information Tab displays:

Elements of the Information Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to create a new value.
	Click here to delete the selected value.
	Click here to save changes.
	Click here to access the online help.

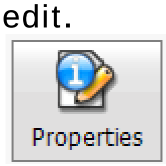
Id - This field is the identification for the value.
Site ID - This is the site profile under which the value was created.
Name - This is the name of the value.
Comments - This is a place for any additional information about the value.

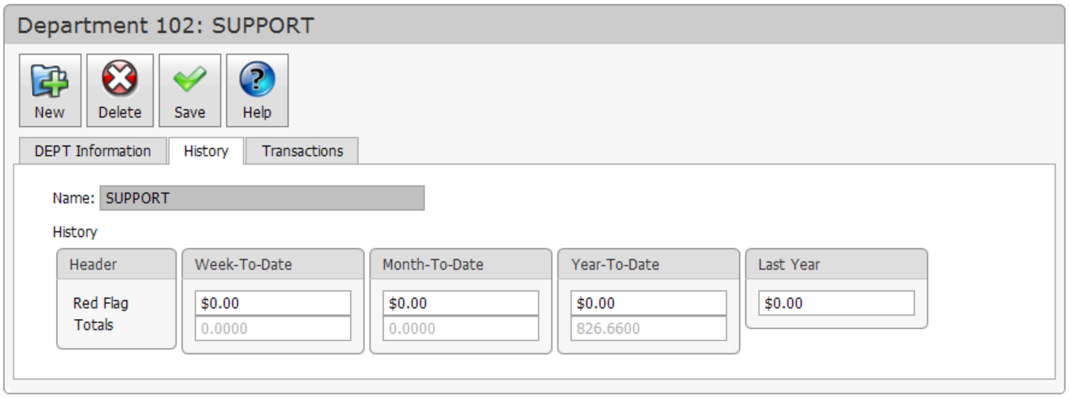
The History Tab

The History Tab contains transaction information about the selected value.

Accessing the History Tab

To access the History Tab, follow the steps below:

1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Select a value to edit.
4. Click **Properties**  . The Information Tab displays.
5. Click the **History** tab. The History tab displays:



Elements of the History Tab

The following table illustrates the function of each icon:

Icon	Function
New	Click here to create a new value.
Delete	Click here to delete the selected value.
Save	Click here to save changes.
Help	Click here to access the online help.

Fields

Name - This is the name of the value.
Totals - Week-To-Date - This is an accumulation of all items that this value has used this week.
Totals - Month-To-Date - This is an accumulation of all items that this value has been involved with this month.
Totals - Year-To-Date - This is an accumulation of all items that this value has been involved with this year.
Red Flag Amounts - If the Total amount exceeds the Red Flag amount for any of the time periods, an entry will appear on the Red Flag report.

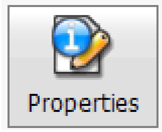
Last Year - At the end of each year, the Year-To-Date figure is stored in the Last Year field and the Year-To-Date field is cleared for the new year.

The Transactions Tab

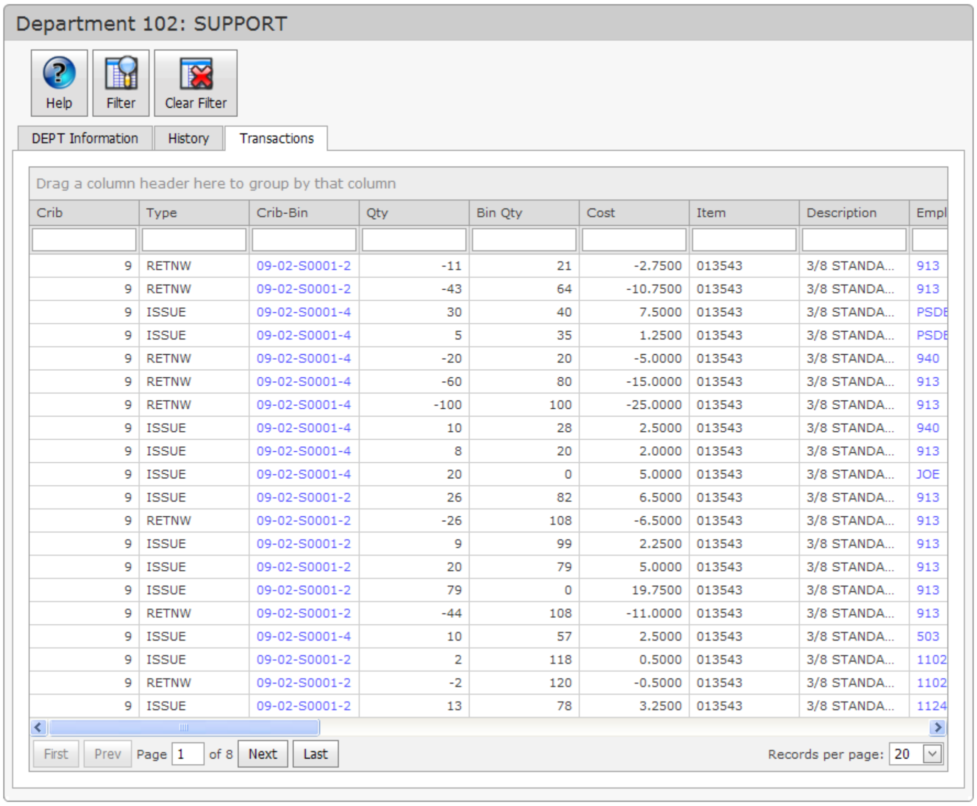
The Transactions Tab displays details about transactions involving the selected value.

Accessing the Transactions Tab

To access the Transactions Tab, follow the steps below:

1. Login to AdvantageWeb.
2. Select a User-Defined field from the Data Management section. The User-Defined field screen displays.
3. Select a value to edit.
4. Click **Properties** 

. The Information Tab displays.
5. Click the **Transactions** tab. The Transactions tab displays:


Department 102: SUPPORT

Help Filter Clear Filter

DEPT Information | History | Transactions

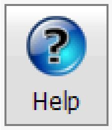
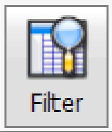
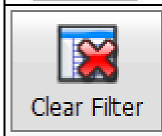
Drag a column header here to group by that column

Crib	Type	Crib-Bin	Qty	Bin Qty	Cost	Item	Description	Empl
9	RETNW	09-02-S0001-2	-11	21	-2.7500	013543	3/8 STANDA...	913
9	RETNW	09-02-S0001-2	-43	64	-10.7500	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-4	30	40	7.5000	013543	3/8 STANDA...	PSDE
9	ISSUE	09-02-S0001-4	5	35	1.2500	013543	3/8 STANDA...	PSDE
9	RETNW	09-02-S0001-4	-20	20	-5.0000	013543	3/8 STANDA...	940
9	RETNW	09-02-S0001-4	-60	80	-15.0000	013543	3/8 STANDA...	913
9	RETNW	09-02-S0001-4	-100	100	-25.0000	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-4	10	28	2.5000	013543	3/8 STANDA...	940
9	ISSUE	09-02-S0001-4	8	20	2.0000	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-4	20	0	5.0000	013543	3/8 STANDA...	JOE
9	ISSUE	09-02-S0001-2	26	82	6.5000	013543	3/8 STANDA...	913
9	RETNW	09-02-S0001-2	-26	108	-6.5000	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-2	9	99	2.2500	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-2	20	79	5.0000	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-2	79	0	19.7500	013543	3/8 STANDA...	913
9	RETNW	09-02-S0001-2	-44	108	-11.0000	013543	3/8 STANDA...	913
9	ISSUE	09-02-S0001-4	10	57	2.5000	013543	3/8 STANDA...	503
9	ISSUE	09-02-S0001-2	2	118	0.5000	013543	3/8 STANDA...	1102
9	RETNW	09-02-S0001-2	-2	120	-0.5000	013543	3/8 STANDA...	1102
9	ISSUE	09-02-S0001-2	13	78	3.2500	013543	3/8 STANDA...	1124

First Prev Page 1 of 8 Next Last Records per page: 20

Elements of the Transactions Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to access the online help.
	Click here to create a query for transactions meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

Crib - This is the crib in which the transaction took place.
Type - This is the type of transaction.
Crib-Bin - This is the CribBin in which the transaction took place.
Qty - This is the number of items involved in the transaction.
Bin Qty - This is the number of items left in the bin after the transaction.
Cost - This is the dollar amount used in performing the transaction.
Item - This is the item involved in the transaction.
Description - This is a description of the item.
Empl ID - This is the user ID of the employee that performed the transaction.
Issued To ID - In the case of an Issue Transaction, this is the user ID of the item recipient.
Date - This is the date the transaction took place.
Serial ID - If the item involved in the transaction is serialized, this is the serial ID of the item.
Usage Item Number - In transactions involving reservations, this is the substitute item number.
Usage CribBin - In transactions involving reservations, this is the substitute CribBin.
Other CribBin - This depends on the type of transaction:

- ISSRT - Contains the Return To CribBin if different
- RECVE - Contains Rework bin if Receive New As Rework Option is Enabled for this item

- TRACK - Contains the final destination bin

WO Seq - This field is populated if the transaction was done against a Work Order.
Batch - If the item is part of batch scan, the ID appears in this column.
Expected Accuracy (%) - This is the expected accuracy of the cycle count.
Site No. - This is the name of the Site Profile involved with the transaction.
No. - This is the database record of the transaction.
User (1-6) - If a user-defined field was used during the transaction, it is listed here.

Transactions

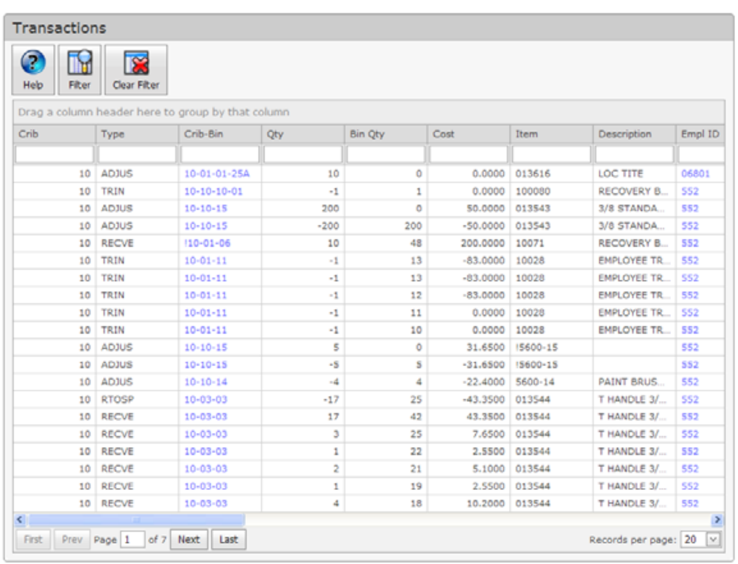
The Transactions Screen

The Transactions Screen displays all of the transactions that have taken place in the system.

Accessing the Transactions Screen

To access the Transactions Screen, follow the steps below:

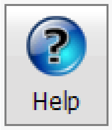
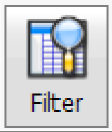
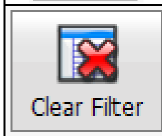
1. Login to AdvantageWeb.
2. Click **Transactions**. The Transactions Screen displays:



Crib	Type	Crib-Bin	Qty	Bin Qty	Cost	Item	Description	Empl ID
10	ADJUS	10-01-01-25A	10	0	0.0000	013616	LOC TITE	06801
10	TRIN	10-10-10-01	-1	1	0.0000	100080	RECOVERY B...	552
10	ADJUS	10-10-15	200	0	50.0000	013543	3/8 STANDA...	552
10	ADJUS	10-10-15	-200	200	-50.0000	013543	3/8 STANDA...	552
10	RECVE	!10-01-06	10	48	200.0000	10071	RECOVERY B...	552
10	TRIN	10-01-11	-1	13	-83.0000	10028	EMPLOYEE TR...	552
10	TRIN	10-01-11	-1	13	-83.0000	10028	EMPLOYEE TR...	552
10	TRIN	10-01-11	-1	12	-83.0000	10028	EMPLOYEE TR...	552
10	TRIN	10-01-11	-1	11	0.0000	10028	EMPLOYEE TR...	552
10	TRIN	10-01-11	-1	10	0.0000	10028	EMPLOYEE TR...	552
10	ADJUS	10-10-15	5	0	31.6500	!5600-15		552
10	ADJUS	10-10-15	-5	5	-31.6500	!5600-15		552
10	ADJUS	10-10-14	-4	4	-22.4000	5600-14	PAINT BRUS...	552
10	RTOSP	10-03-03	-17	25	-43.3500	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	17	42	43.3500	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	3	25	7.6500	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	1	22	2.5500	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	2	21	5.1000	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	1	19	2.5500	013544	T HANDLE 3/...	552
10	RECVE	10-03-03	4	18	10.2000	013544	T HANDLE 3/...	552

Elements of the Transactions Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to access the online help.
	Click here to create a query for transactions meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

<u>Crib</u> - This is the crib in which the transaction took place.
<u>Type</u> - This is the type of transaction.
<u>Crib-Bin</u> - This is the CribBin in which the transaction took place.
<u>Qty</u> - This is the number of items involved in the transaction.
<u>Bin Qty</u> - This is the number of items left in the bin after the transaction.
<u>Cost</u> - This is the dollar amount used in performing the transaction.
<u>Item</u> - This is the item involved in the transaction.
<u>Description</u> - This is a description of the item.
<u>Empl ID</u> - This is the user ID of the employee that performed the transaction.
<u>Issued To ID</u> - In the case of an Issue Transaction, this is the user ID of the item recipient.
<u>Date</u> - This is the date the transaction took place.
<u>Serial ID</u> - If the item involved in the transaction is serialized, this is the serial ID of the item.
<u>Usage Item Number</u> - In transactions involving reservations, this is the substitute item number.
<u>Usage CribBin</u> - In transactions involving reservations, this is the substitute CribBin.
<u>Other CribBin</u> - This depends on the type of transaction:

- ISSRT - Contains the Return To CribBin if different
- RECVE - Contains Rework bin if Receive New As Rework Option is Enabled for this item
- TRACK - Contains the final destination bin

WO Seq - This field is populated if the transaction was done against a Work Order.
Batch - If the item is part of batch scan, the ID appears in this column.
Expected Accuracy (%) - This is the expected accuracy of the cycle count.
Site No. - This is the name of the Site Profile involved with the transaction.
No. - This is the database record of the transaction.
User (1-6) - If a user-defined field was used during the transaction, it is listed here.

Chapter 6: Purchasing

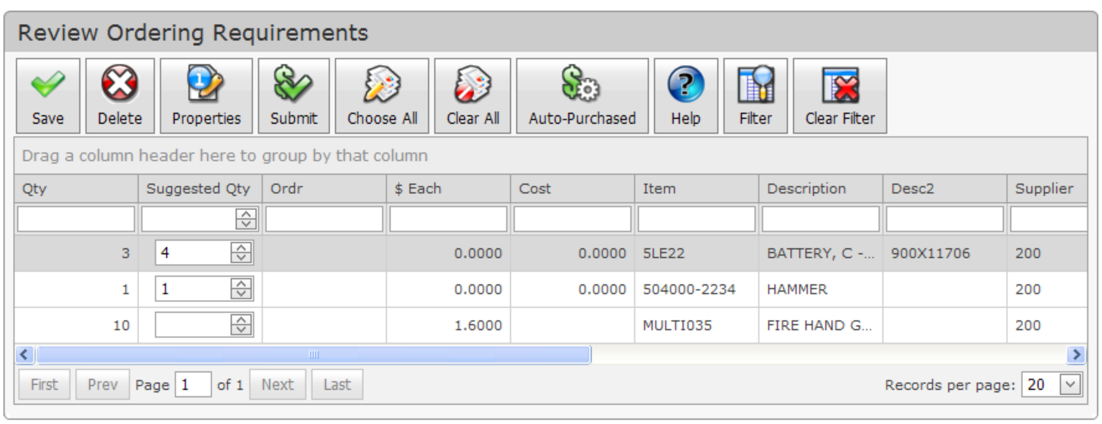
Reviewing Ordering Requirements

CribMaster has the option to require a review of suggested orders by Crib before they go to the Authorize Purchase Screen. This is useful if there is a separate buyer for items and you would like the crib attendant or crib supervisor to look at items before they are purchased. Invoke this option on the Advanced tab of the Crib Properties dialog box.

Accessing the Review Ordering Requirements Screen

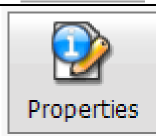
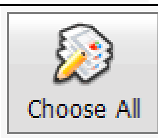
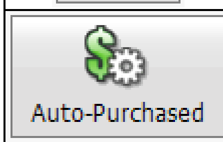
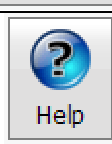
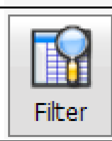
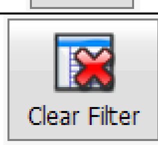
To access the Review Ordering Requirements Screen, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Review Ordering Requirements**. The Review Ordering Requirements screen displays:



Elements of the Review Ordering Requirements Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to save any changes.
	Click here to remove the selected item from the list.
	Click here to input or change the purchase order detail about the selected item.
	Click here to trigger an auto-purchase for the selected item.
	Click here to select (place the suggested quantity in the Ordr column) for all items in the list.
	Click here to clear all entries in the Ordr column for the items currently in the list.
	Click here to remove auto purchased items from the list.
	Click here to access the online help.
	Click here to create a query for purchase orders meeting specific criteria.
	Click here to remove the active search criteria.

Column Headers

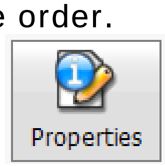
Qty - This is the quantity from the original order
Suggested Qty - This is the quantity that is suggested by the owner of the purchase order.
Ordr - This is the qty to be Purchased.
$ Each - This is the per item cost.
Cost - This is the total order cost.
Item - This is the Item ID.
Description - This is a description of the item.
Desc2 - This is a description of the item.
Supplier - This is the Supplier ID.
Crib-Bin - This is the Crib-Bin ID.
Bin Comment - This is the comment field from the Bin Information tab.
Special - This is the special field from the Item Information tab in Inventory Properties.
WO - This is the WO number for the order if using Preventive Maintenance.
No. - This is the database identifier for the item.
Type - This is the purchase type.

The Pending Order Detail Tab

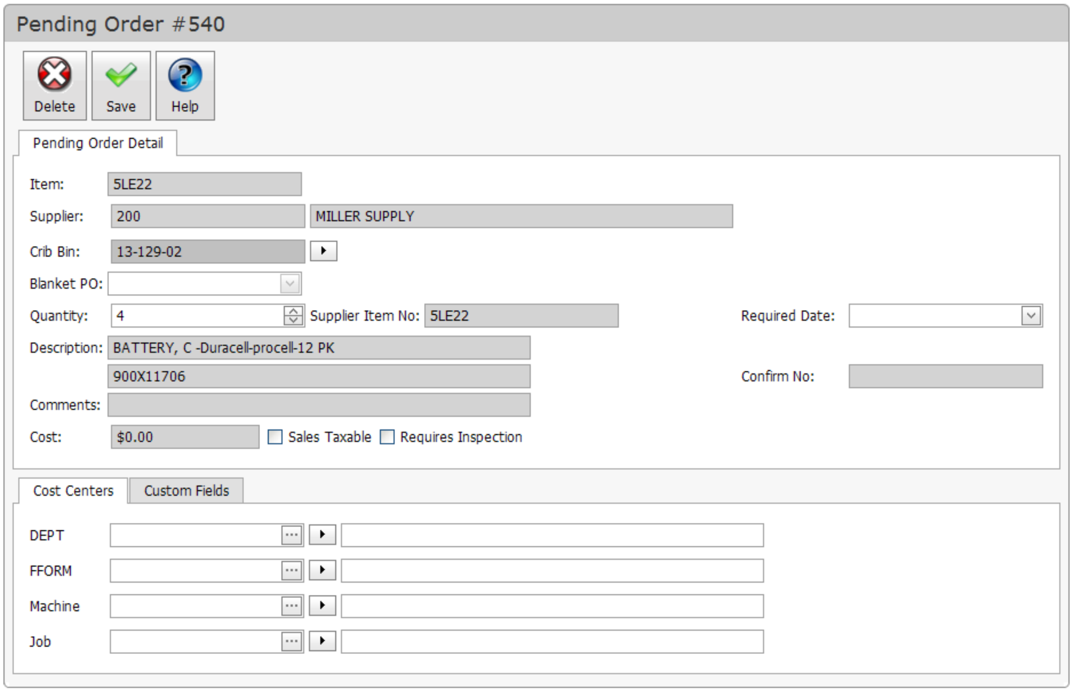
The Pending Order Detail Tab contains the details of the selected purchase order.

Accessing The Pending Order Detail Tab

To access the Pending Order Detail Tab, follow the steps below:

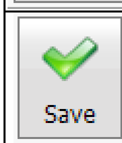
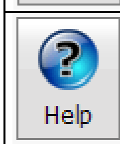
1. Login to AdvantageWeb.
2. Click **Review Ordering Requirements**. The Review Ordering Requirements screen displays.
3. Select a purchase order.
4. Click **Properties** 

. The Pending Order Detail Tab displays:



Elements of the Pending Order Detail Tab

The following table illustrates the function of each icon:

Icon	Function
	Click here to delete the
	Click here to save any changes.
	Click here to access the online help.

Fields

<u>Item</u> - Enter an item to order if the item exists in the database.

> **TIP:** You can use an item number from the inventory system to pull the properties of the item (cost, supplier info, etc.) even if you do not plan to enter a Crib-Bin to track the purchase.

Supplier - This is the primary supplier for the item.
Crib/Bin - This is the crib/bin with which the item is associated. Select an alternate crib/bin if needed.
Blanket PO - This is the supplier blanket PO that the item will be purchased against.
Quantity - Enter a quantity to order.
Supplier Item Number - This is the item number from the supplier. The information comes from inventory properties.

> **TIP:** If unknown, enter unknown or something equivalent.

> **NOTE:** This is a required field for one time buys.

Required Date - Enter the date by which the items are needed. Optionally, the required date is populated based on the average lead time.

> **NOTE:** Prints on the Purchase Order. This is to advise the supplier when the item is needed.

Description - This is a description of the item. The information comes from inventory properties.
Confirm No - This is the confirmation number of the order.

> **NOTE:** This number displays on the receiving screen and allow you to receive using the confirmation number.

Comment - This is any additional information.

> **NOTE:** This will print on the Purchase Order.

Cost - This is the per unit cost of the item.
Sales Taxable - This is the CribMaster computed sales tax for this item. The information comes from inventory properties.
Requires Inspection - This box denotes whether or not the item needs to be inspected before receiving into the crib/bin. The information comes from inventory properties.
Cost Centers - Click this button to locate and select a cost center.
Custom Fields - These are custom fields associated with Purchase Order Line Items.

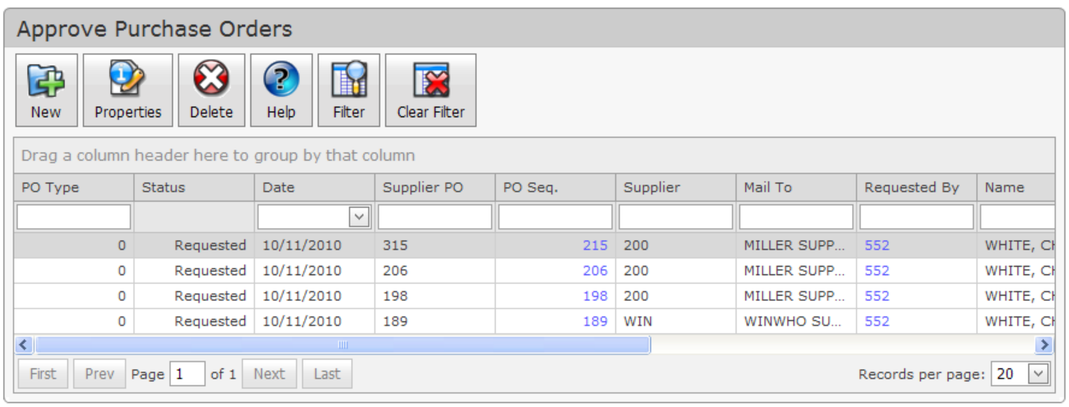
Approving Purchase Orders

The Approve Purchase Orders Screen is used to authorize purchase orders.

Accessing the Purchase Orders Screen

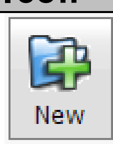
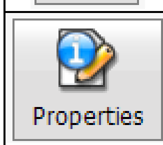
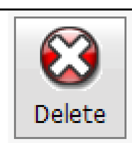
To access the Purchase Orders Screen, follow the steps below:

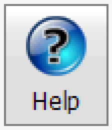
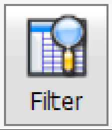
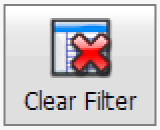
1. Login to AdvantageWeb.
2. Click **Approve Purchase Orders**. The Approve Purchase Orders screen displays:



Elements of the Approve Purchase Orders Screen

The following table illustrates the function of each icon:

Icon	Function
	Disabled on this page.
	Click here to access the properties of the selected purchase order. **TIP:** You can also access bin properties by clicking the hyper linked CribBin number.
	Disabled on this page.

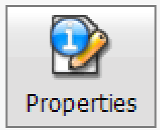
	Click here to access the online help.
	Click here to create a query for purchase orders meeting specific criteria.
	Click here to remove the active search criteria.

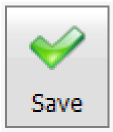
Column Headers

PO Type - This is the type of purchase order.
Status - This is the status of the purchase order (Partial, Ordered, Closed, etc.)
Date - This is the date the item was ordered.
Supplier PO - This is the purchase order number of the supplier.
PO Seq. - The CribMaster Order number. This is the internal CribMaster purchase order number that makes each PO generated in CribMaster unique.
Supplier - This is the supplier of the item.
Mail To - This information is populated from the supplier properties.
Requested By - This is the employee who requested the items.
Name - This is the name of the employee who created the PO.
Approved By - This is the employee approving the PO.
Created By - This is the employee who created the PO.
Buyer - This is the employee responsible for buying the item.
Note - This is any additional information about the PO.
Site - This is the site at which the item will be used.

Editing a Purchase Order

To edit a purchase order, follow the steps below:

1. Login to AdvantageWeb.
2. Click **Approve Purchase Orders**. The Approve Purchase Orders screen displays.
3. Select a purchase order.
4. Click **Properties** 

. The Purchase Order Tab displays.
5. Make any necessary changes.
6. Click **Save** 

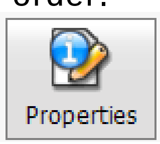
. The changes are saved.

The Purchase Order Tab

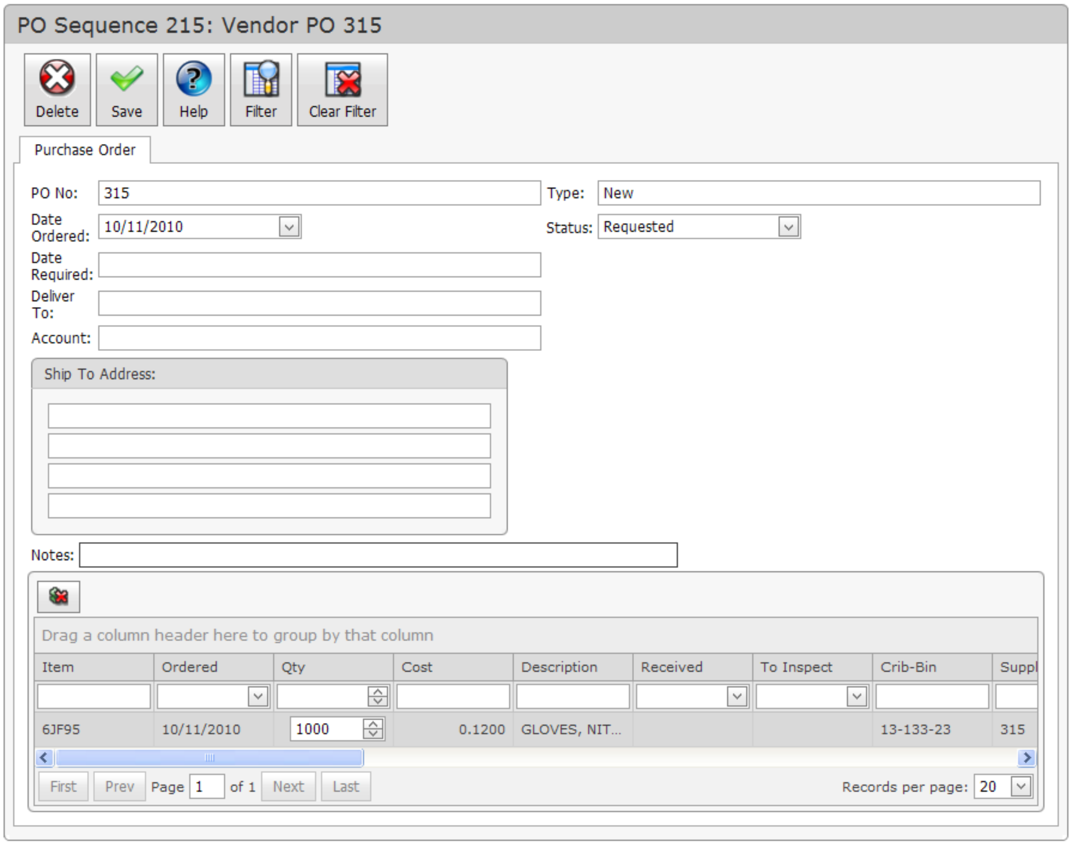
The Purchase Order Tab can be accessed from the Approve Purchase Orders Screen.

Accessing the Purchase Order Tab

To access the purchase order tab, follow the steps below:

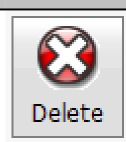
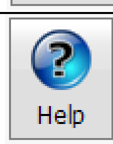
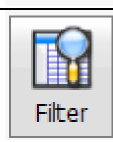
1. Login to AdvantageWeb.
2. Click **Approve Purchase Orders**. The Approve Purchase Orders screen displays.
3. Select a purchase order.
4. Click **Properties** 

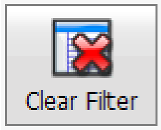
. The Purchase Order Tab displays:



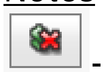
Elements of the Purchase Order Tab

The following table illustrates the function of each icon:

Icon	Function
 Delete	Click here to delete
 Save	Click here to save any changes.
 Help	Click here to access the online help.
 Filter	Click here to create a query for pending orders meeting specific criteria.

	Click here to remove the active search criteria.

Fields

PO No. - This is the purchase order number and it prints in the Purchase Order Number block on the PO. This number is not required to be unique and you can put the same number on 2 POs. The Order Number above will distinguish different POs in this case.
Type - This is the type of purchase.
Date Ordered - This is the date the items were ordered.
Status - Displays the current status of the PO. The status can also be changed here.
Date Required - This is the date by which the order is needed.
Deliver To - This is the employee to whom the item is to be sent.
Account - This is the account number (if applicable).
Ship To Address - This is the address to which the item is to be sent.
Notes - This is space for any additional comments.
 - Select an item from the list below and click this button to remove it from the purchase order.

Chapter 7: Reports

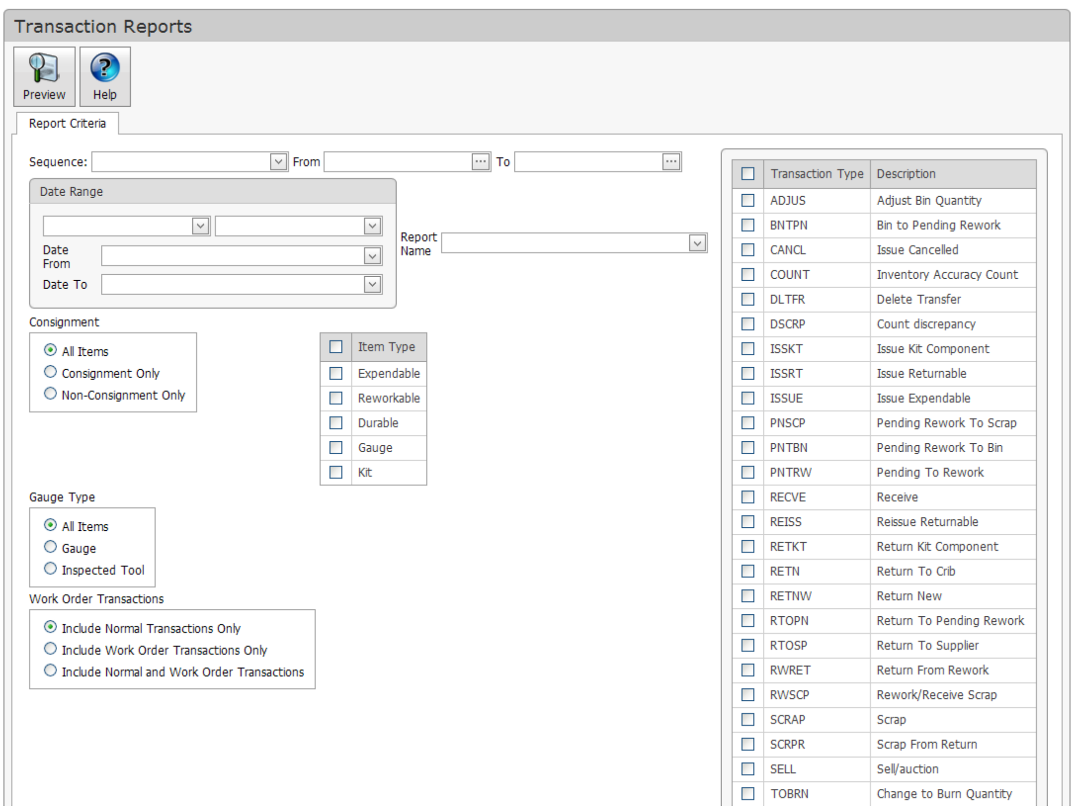
Transaction

The Transaction Report can be run for all transactions that took place using AdvantageWeb.

Running Transaction Reports

To access the Transaction Report Screen, follow the steps below:

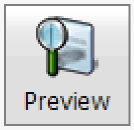
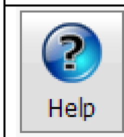
1. Login to Advantage Web.
2. Under Reports, click **Transaction**. The Transaction Report screen displays:



3. Select **Report Criteria**.
4. Select a **Report Name**.
5. Click **Preview**.

Elements of the Transaction Report Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to view the report and access options for saving it as a PDF or printing it. **NOTE:** Pop-ups must be allowed for the AdvantageWeb site for the report window to open. See Disabling the Pop-up Blocker for more information.
	Click here to access the online help.

Fields

Sequence - Select a field with which to base a sequence selection.
Date Range - Use these fields to narrow the results based on date.
Consignment - Select whether or not the included items are consignment.
Gauge Type - If the items you are reporting on are gauges, you can specify the type.
Item Type - Select the types of items you want to include in the report.
Work Order Transactions - Select whether to include Work Order transactions, only Work Order transactions, or no Work Order transactions.
Type - Select one or more types of transactions to include in the report.

Employee

The Employee Report can be run for all employees using AdvantageWeb.

Running Employee Reports

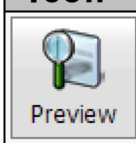
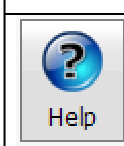
To access the Employee Report Screen, follow the steps below:

1. Login to Advantage Web.
2. Under Reports, click **Employee**. The Employee Report screen displays:

3. Select **Report Criteria**.
4. Select a **Report Name**.
5. Click **Preview**.

Elements of the Employee Report Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to view the report and access options for saving it as a PDF or printing it. **NOTE:** Pop-ups must be allowed for the AdvantageWeb site for the report window to open. See Disabling the Pop-up Blocker for more information.
	Click here to access the online help.

Fields

Sequence - Select a field with which to base a sequence selection.

- From - Depending on your sequence selection, enter or look up a value with which to base this part of the range.
- To - Depending on your sequence selection, enter or look up a value with which to base this part of the range.

Report Name - This is the list of available employee reports.

- Employee Listing - This report is a list of employees.
- Bar Code Listing - This report is a list of employees with bar codes.
- Employee Cards - This report is a list of employee cards that include the bar code.
- Employee Label - This report is a list of bar code labels to attach to existing employee cards.

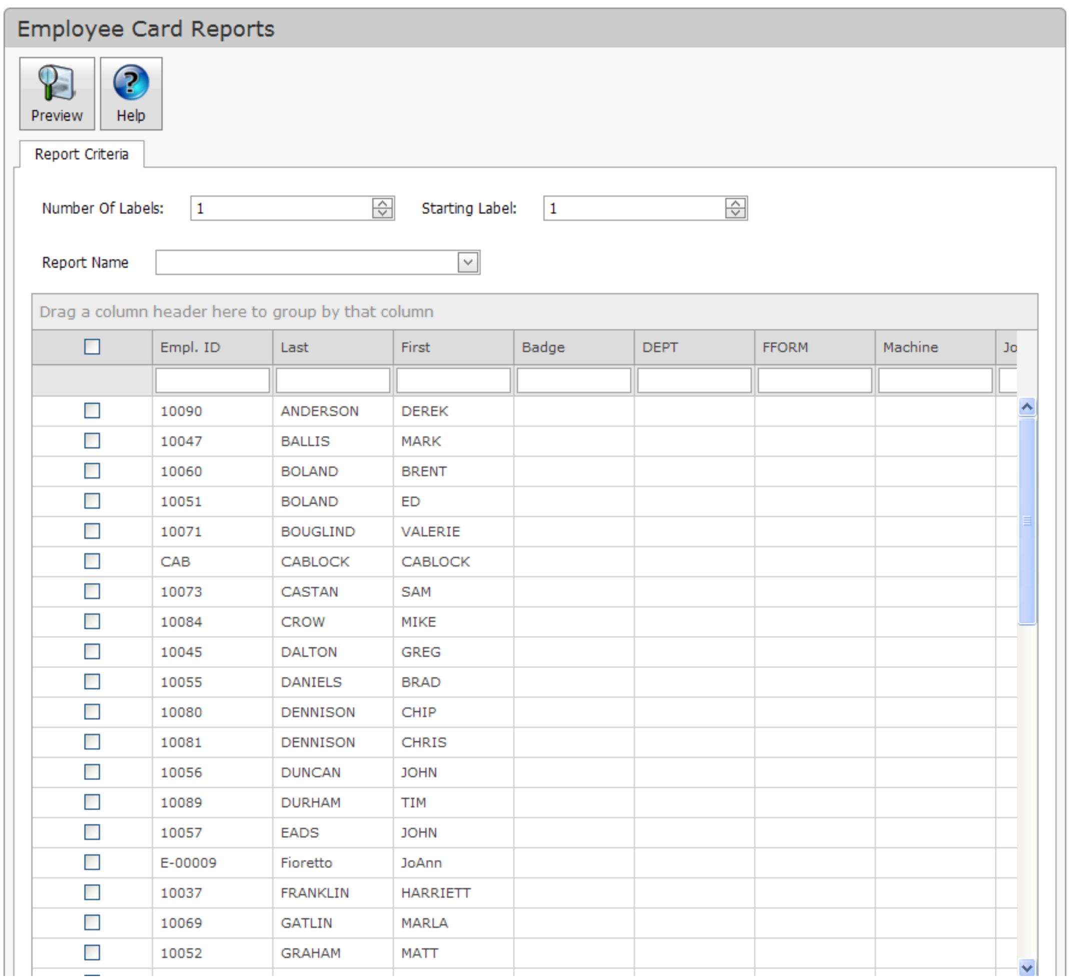
Employee Card

The Employee Card Report can be run for all employees using AdvantageWeb.

Running Employee Card Reports

To access the Employee Report Screen, follow the steps below:

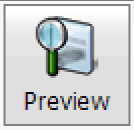
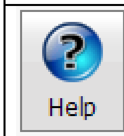
1. Login to Advantage Web.
2. Under Reports, click **Employee Card**. The Employee Report Card screen displays:



3. Select **Report Criteria**.
4. Select a **Report Name**.
5. Click **Preview**.

Elements of the Employee Card Report Screen

The following table illustrates the function of each icon:

Icon	Function
	Click here to view the report and access options for saving it as a PDF or printing it. **NOTE:** Pop-ups must be allowed for the AdvantageWeb site for the report window to open. See Disabling the Pop-up Blocker for more information.
	Click here to access the online help.

Fields

Number of Labels - Enter the number cards to print.
Starting Label - Count left to right then down starting with the upper left hand corner. This allows you to skip positions on the card page. Card number 1 is in the top left hand corner. Count across, then down to get the card number where you wish to start.
Report Name - Select a report to run from this list.

- Employee Label - Select this report to print bar code labels to attach to existing employee cards.
- Employee Card - Select this report to print employee cards including the bar code.

Column Headers

Empl. ID - This is the identification number of the employee.
Last - The last name of the employee.
First - The first name of the employee.
Badge - This is the badge number of the employee (if applicable).
User (1-6) - There are the employee's default values for user-defined fields.
Supervisor - This is the supervisor of the employee.
Inactive - This denotes whether or not the employee has access.
FOD Control - This displays the type of FOD (Foreign Object Debris) level the employee has.
Group Account - This filed denotes whether or not the employee is able to log in through CmProxy for mobile devices.

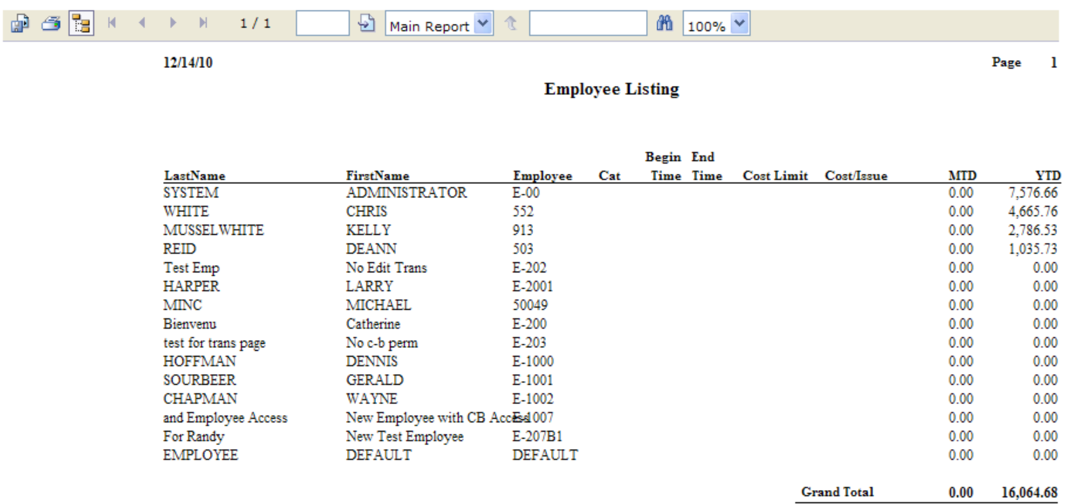
Login Disabled - This denotes whether or not the employee is able to log in to AdvantageWeb.
Month To Date - This is an accumulation of all items that this employee has used this month.
Name - This is the concatenated First and Last name.
Site ID - This is the site assigned to the employee.
Week To Date - This is an accumulation of all items that this employee has used this week.
Year To Date - This is an accumulation of all items that this employee has used this year.
HIRE DATE - This is the date the employee was hired.

Exporting Reports

Data that displays in a report can be exported into other formats.

Previewing a Report

1. Login to Advantage Web.
2. Under Reports, select the report you want to export. The report screen displays.
3. Select **Report Criteria**.
4. Select a **Report Name**.
5. Click **Preview**. The report displays:



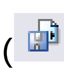
12/14/10 Page 1

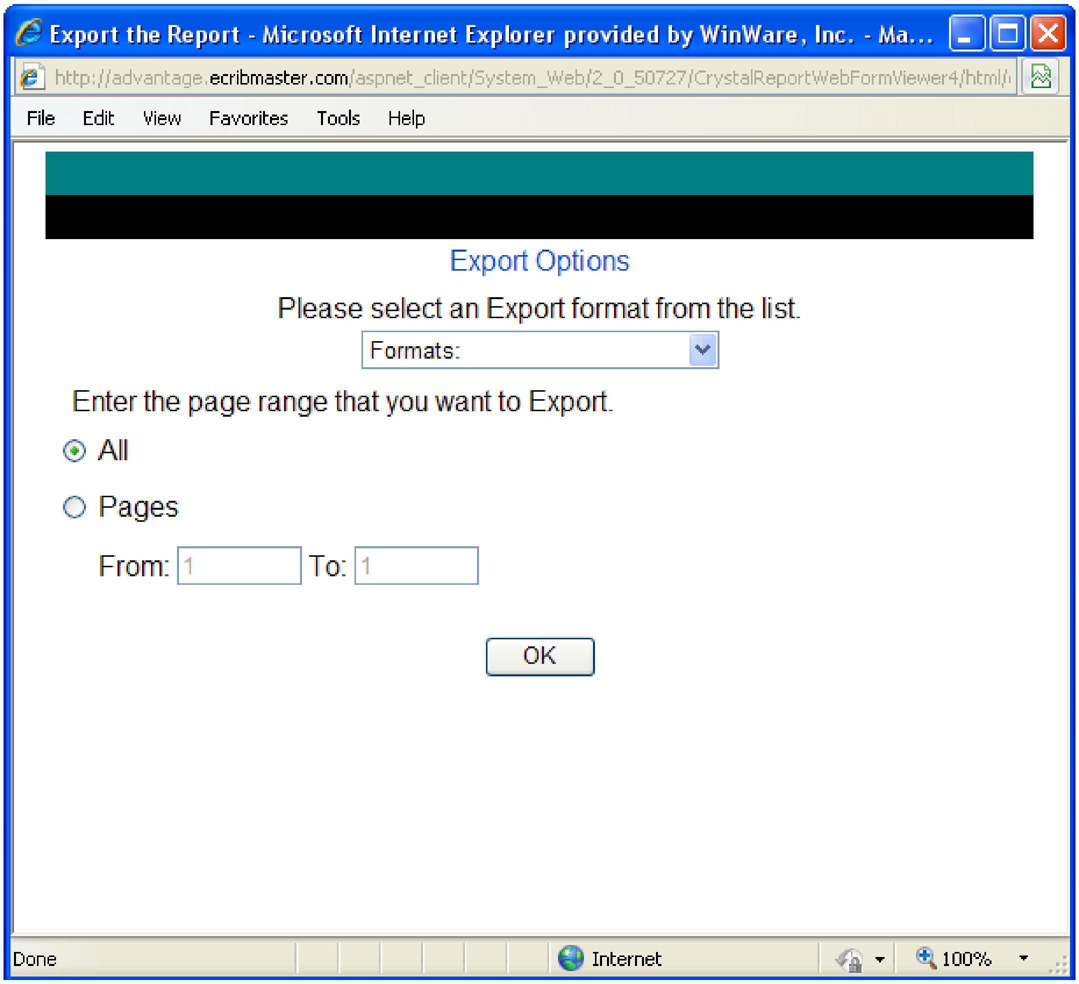
Employee Listing

LastName	FirstName	Employee	Cat	Begin Time	End Time	Cost Limit	Cost/Issue	MTD	YTD
SYSTEM	ADMINISTRATOR	E-00						0.00	7,576.66
WHITE	CHRIS	552						0.00	4,665.76
MUSSELWHITE	KELLY	913						0.00	2,786.53
REID	DEANN	503						0.00	1,035.73
Test Emp	No Edit Trans	E-202						0.00	0.00
HARPER	LARRY	E-2001						0.00	0.00
MINC	MICHAEL	50049						0.00	0.00
Bienvenu	Catherine	E-200						0.00	0.00
test for trans page	No c-b perm	E-203						0.00	0.00
HOFFMAN	DENNIS	E-1000						0.00	0.00
SOURBEER	GERALD	E-1001						0.00	0.00
CHAPMAN	WAYNE	E-1002						0.00	0.00
and Employee Access	New Employee with CB Access	E-1007						0.00	0.00
For Randy	New Test Employee	E-207B1						0.00	0.00
EMPLOYEE	DEFAULT	DEFAULT						0.00	0.00
							Grand Total	0.00	16,064.68

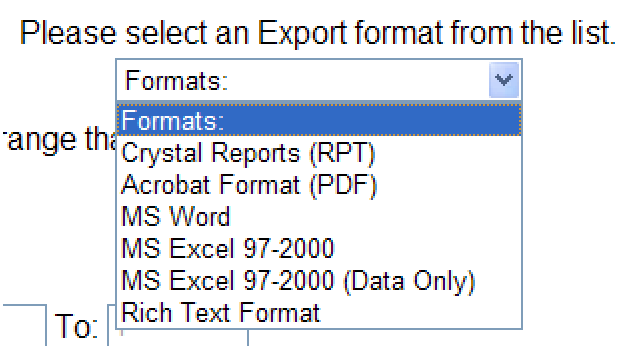
Click **Print** () to send the report to the printer.

Exporting the Report

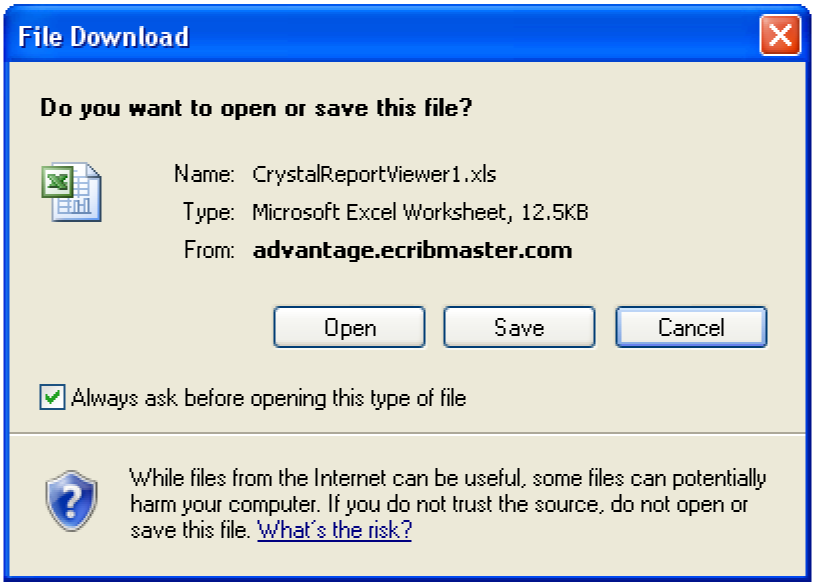
1. From the preview window, click **Export** (). The Export Options dialog box displays:



2. Select a format from the drop-down:



3. Select whether to print all pages or a range.
4. Click **OK**. The File Download dialog box displays:



5. Do one of the following:
   - Click **Open** to open the file in the applicable application.
   - Click **Save** to save the file.

Chapter 8: Permissions

Crib Permissions

Employees will need particular crib permissions in order to access bin or item information in AdvantageWeb.

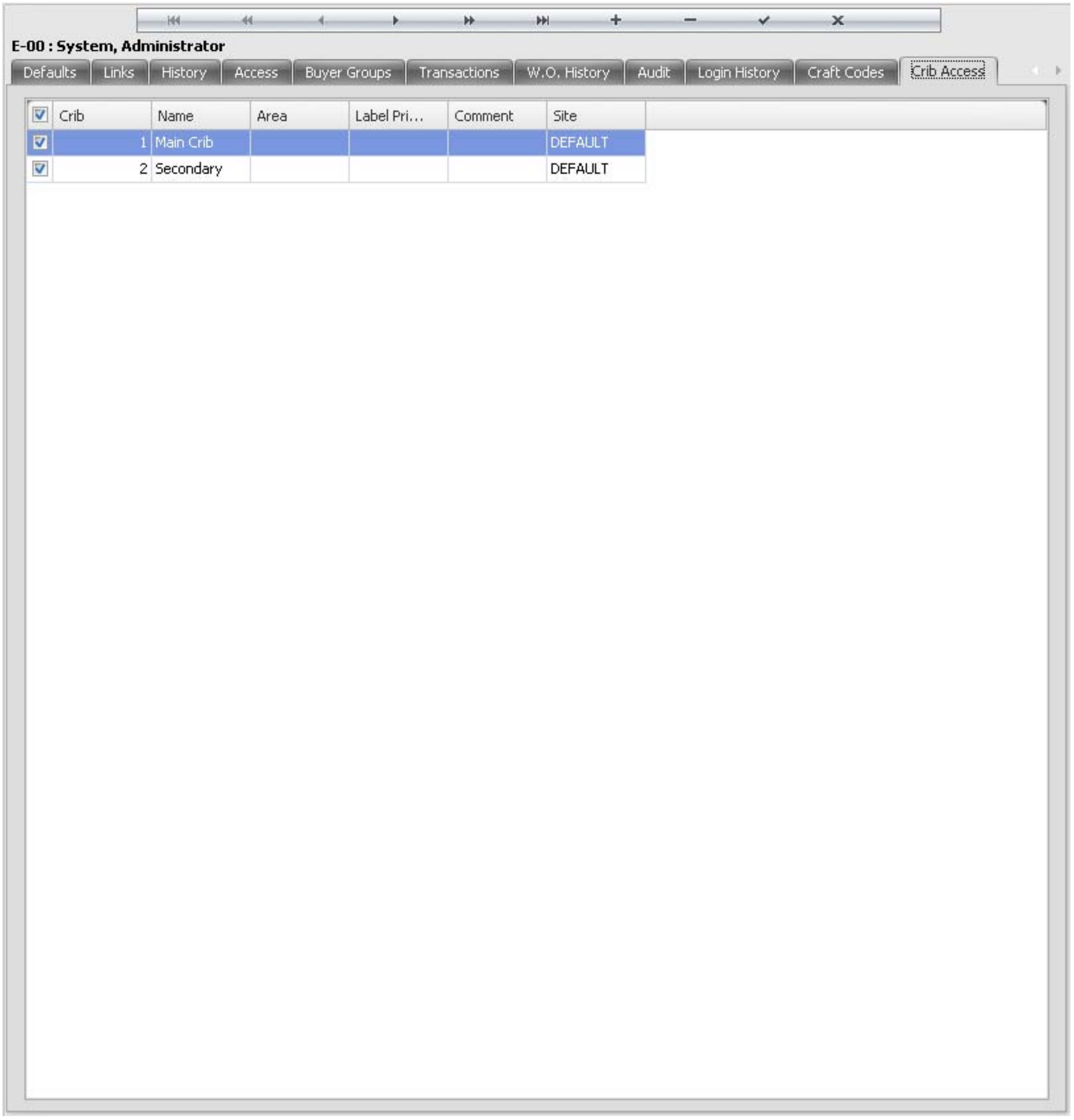
Setting Separate Crib Permissions

NOTE: Before you can set separate crib permissions, you first have to enable the option. Click **System > System Options > Configuration**. The Configuration screen displays. Check Enable separate security privileges for primary and non-primary cribs.

TIP: You can also check Also require transaction privileges for CribMaster ATR (vending equipment) to include ATR in the separate crib permissions setting.

IMPORTANT: With this option turned on, all employees, including ones with a DEFAULT site ID will need to access the tab below to select individual cribs for access.

1. Click **Home > Employee**. The Employee Records screen displays.
2. Select the employee you want to edit.
3. Click **Properties** . The Employee Properties dialog box displays.
4. Click the **Crib Access** tab. The Crib Access tab displays:



5. Check the cribs to which the employee needs access.
6. Click .

Cribs that are checked are cribs where the employee has primary access. All other cribs are secondary cribs. Primary cribs have a separate set of security permissions than secondary cribs.

Column Headings

Crib - This field displays the ID of the crib.
Name - This field displays the name given to the crib.
Area - This is the area ID assigned to this crib.
Site - This field displays the purchasing site of the crib.
Comment - This field displays any additional information about the crib.

Employee Permissions

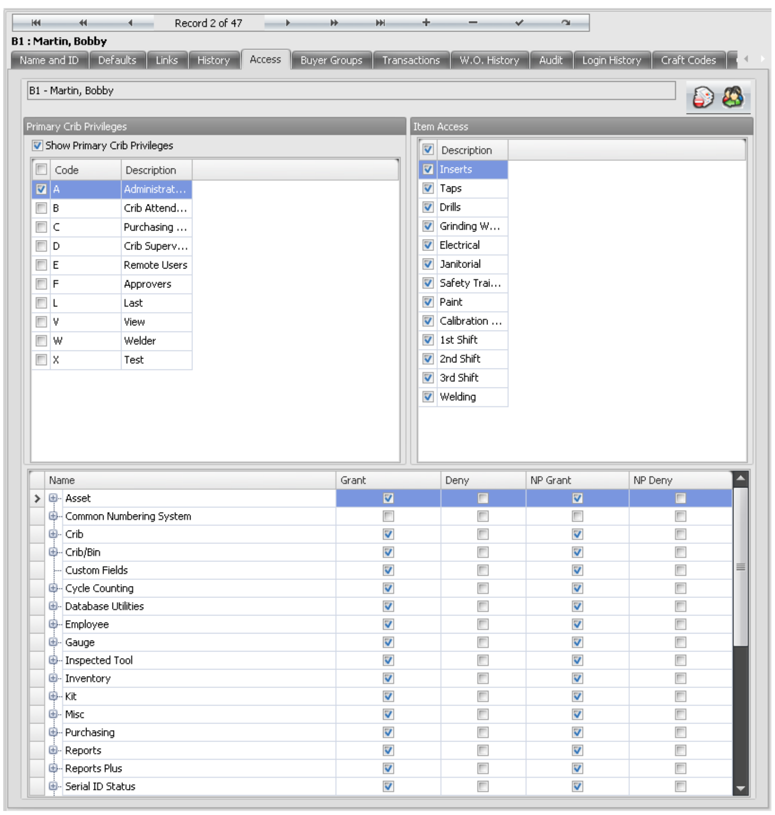
Employees, users of AdvantageWeb, will need to be granted permissions to items and functions. There are set on the Access Tab of Employee Properties in CribMaster.

Using the Access Tab

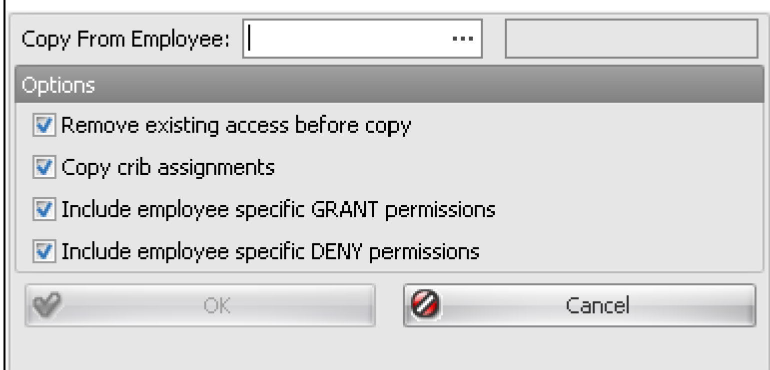
The Access tab is used to assign the security levels for your employees. It allows you to set access to the CribMaster System and item access for each employee.

To access the Access tab, follow the directions below:

1. Click **Home > Employee**. The Employee Records screen displays.
2. Select the employee you want to edit.
3. Click **Properties** . The Employee Properties dialog box displays.
4. Click the **Crib Access** tab. The Crib Access tab displays:



The following table illustrates the function of the buttons located on the Access Tab:

Icon	Function
	Click this button to reset the selected employee's permissions: • Item Access Codes • Primary Crib Groups • Non-Primary Crib Groups • Primary Crib Permissions • Non-Primary Crib Permissions
	Click this button to copy permissions from another employee:  1. Click **Lookup** to select an employee from which to copy permissions. 2. Select the appropriate options. 3. Click **OK**.

Name - This is the joined First Name and Last Name fields from the Name and ID tab.
Primary Crib Privileges - This list shows the CribMaster security groups. Select the security groups for this employee by checking the box or boxes next to each group granted to the employee.

> **TIP:** These groups are entered on the Security Access Codes dialog box.

View Non-Primary Privileges - Check this box to toggle the view between primary and non-primary privileges.

> **NOTE:** This option is only available if the option "Enable separate security privileges for primary and non-primary cribs" is selected on the **Options > Configuration** tab.

<u>Id</u> - This is the database identifier of the security access code.
<u>Code</u> - This is the security code itself.
<u>Description</u> - This is a field that describes the security access code.
<u>Item Access</u> - This list shows the item access codes. Select codes for each employee by checking the box next to each access group.

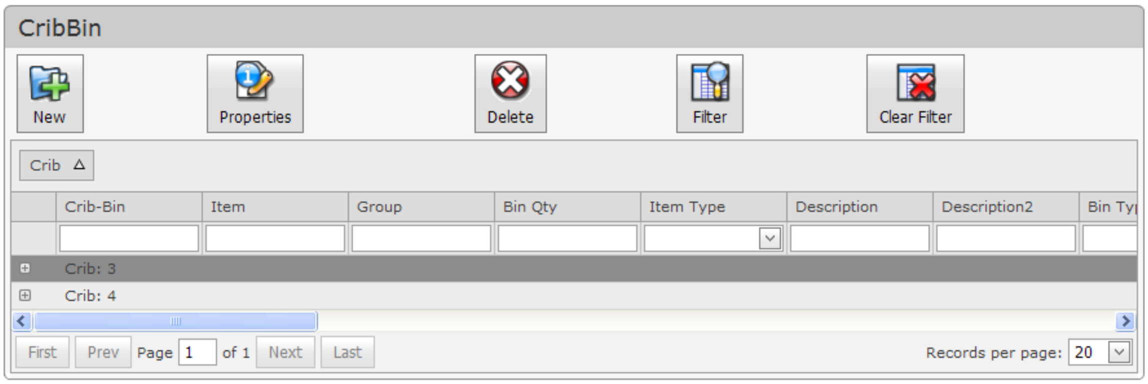
> **TIP:** These groups are entered on the Item Access Codes dialog box.
>
> <u>Access</u> - This is the access code.
> <u>Description</u> - This is a field that describes the access code.

NOTE: The lower section, with the expandable tree view, is not used with Advantage Web.

Chapter 9: Troubleshooting

Buttons are not Grouped Properly

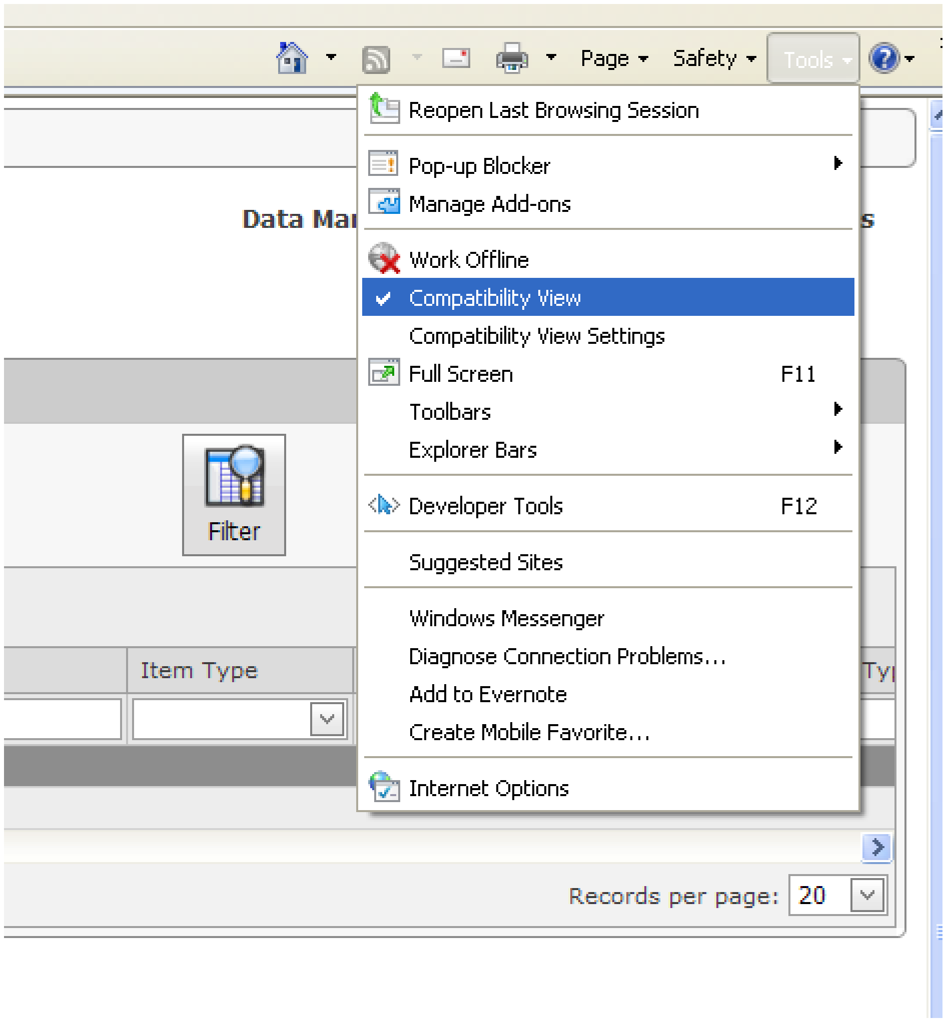
The problem: The buttons that line the top of data screens are stretched across the top rather than grouped together as they should be:



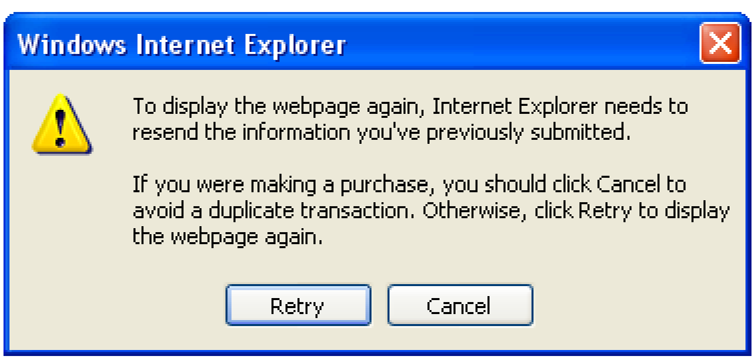
Fixing Button Layout

Typically, this issue arises in later versions of Internet Explorer where Compatibility View is turned on. To turn off Compatibility View, follow the steps below:

1. If it is not already open, open Internet Explorer.
2. Click **Tools**.
3. Click Compatibility View to deselect it:

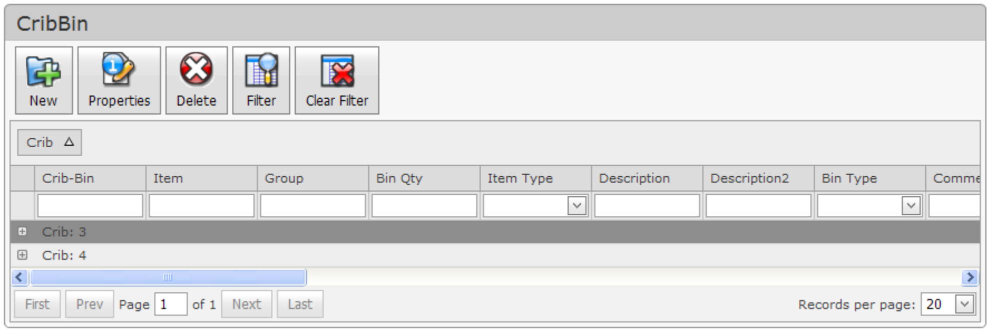


4. If you receive the following prompt, click **Retry**:



5. If you do not receive the above prompt, press **F5** to refresh the page, and then click **Retry** at the prompt.

The page should now be formatted correctly:



User-Defined Field Menu Text is not Updating

The problem: Changes have been made to user-defined field menu text in CribMaster but those changes are not being seen in AdvantageWeb.

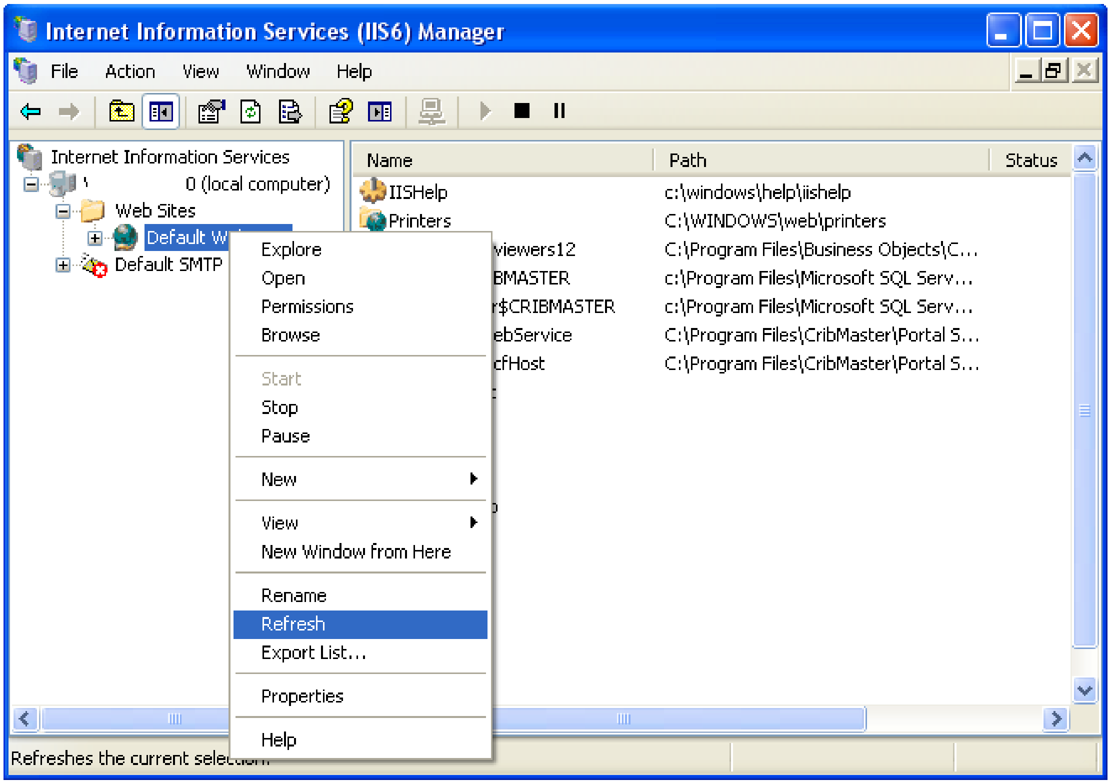
Refreshing CribMaster Configuration Data

When changes are made to user-defined field menu text in CribMaster, Internet Information Services (IIS) will need to be refreshed on the web server before those changes are seen in Advantage Web.

Refreshing IIS

To refresh IIS, follow the steps below:

1. Click **Start > Control Panel**. The Control Panel displays.
2. Do one of the following:
   - For Windows XP, click **Administrative Tools**.
   - For Windows Vista or Windows Server 2008, click **System and Maintenance > Administrative Tools**.
   - For Windows 7 or Windows Server 2008 R2, click **System and Security > Administrative Tools**.
3. Open **IIS Manager**. IIS Manager displays.
4. Expand the server and Web Sites until the Advantage Web site is visible.
5. Right-click the Advantage Web site and select **Refresh**:



IIS is refreshed.

6. Exit the IIS Manager.