Purchasing History **Request System** **Vendor Rating/Management** **Corrective Action**

PURCHASING PRO 2000 PLUS

...Professional Purchasing System

with Vendor Performance Management

ISO9000 Professional Series

World Class Integrated Manufacturing System

USER'S GUIDE

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INTRODUCTION

PURCHASING PRO 2000 PLUS

PURCHASING PRO 2000 PLUS PLUS

The PURCHASING PRO 2000 PLUS PLUS ISO Professional Purchasing System is an integrated program that is designed to provide small and large manufacturers with the ability to thoroughly manage the purchase request system and the purchase order system for an ISO9000 qualified purchasing program. The system also provides valuable management information to analyze and evaluate the effectiveness of the purchasing department.

The Vendor Management System provides the ability to thoroughly monitor the performance of vendors through quantitative rating of delivery and quality performance, provides a corrective action system and a prevention program to improve vendor quality. The Receiving Inspection data is used to automatically generate vendor performance rating letters. The vendors are rated for completeness of order, on time delivery, and quality. Also, corrective action letters are automatically generated and tracked for any vendor that supplied defective parts. These letters detail the inspection results, require the vendor to specify the root cause of the defect, and the corrective action that the vendor will take to preclude reoccurrence of the problem. The response must be made within a user specified time period. The Corrective Action status system keeps track of each corrective action letter.

The PURCHASING PRO 2000 PLUS PLUS ISO9000 Professional Procurement System is designed for any version of Windows, including Windows 95, Windows 98, Windows 2000 and Windows NT versions. The program is 32 bit and is network ready for Windows NT and Novell and is year 2000 compliant.

A unique feature of the program allows use of the full features of the program for demonstration purposes (quantity of new data entry is limited, but sufficient for the user to fully evaluate the capabilities of the program). Activation simply involves the entry of a code by the user to permit unlimited data entry.

The system is provided with sample data to illustrate the functions of the various features. It is strongly suggested that the user access each module and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

ABOUT THIS MANUAL

The PURCHASING PRO 2000 PLUS PLUS manual is provided to introduce the user to the extensive capabilities and features of the PURCHASING PRO 2000 PLUS PLUS program. The manual is purposely brief and simple to follow so that the user will quickly be able to access and use the program. A detailed on line manual is provided through the Help selections at each menu and by pressing the “Help” button on each window of the program.

HARDWARE REQUIREMENTS

PURCHASING PRO 2000 PLUS PLUS can be installed on IBM 486, or Pentium true compatibles with at least 640K of RAM memory. For best performance a 486 or Pentium computer running at a minimum of 333 MHz should be used. PURCHASING PRO 2000 PLUS PLUS needs most of the 640K of RAM so other memory resident (TSR’s) software should be held to a minimum. The complete program requires up to 12 megabytes of hard disk space for all the options. More disk space will be required as data is added. The program is fully network ready and will run on Windows 95, Windows98, Windows 2000, Windows NT or Novell.

INSTALLATION

PURCHASING PRO 2000 PLUS PLUS is supplied on a CD with all the programs and the User’s Guide. The disk will self start when inserted in the drive (or select the CD drive and then Install.exe from explorer). Select the Purchasing and Vendor Rating/Management button, then the Install PURCHASING PRO 2000 PLUS PLUS PLUS System button.

The installation program will create new directories automatically in the drive and directory name the user specifies when prompted. The default directory is C:\PO_PLUS.

To install on a network server map the PO_PLUS folder to a DOS drive (such as J:/PO_PLUS. Then create shortcuts on each workstation with the target J:/PO_PLUS/Purch.exe.

STARTING PROGRAM

During the installation process a program group named PURCHASING PRO 2000 PLUS PLUS was created. To start PURCHASING PRO 2000 PLUS PLUS double click on the PURCHASING PRO 2000 PLUS PLUS icon, or select from the program list in Windows. The program may also be started by double clicking on C:\PURCH\PURCH.EXE (or the directory name specified by the user in the installation process) in either windows File Manager or Explorer. The PURCHASING PRO 2000 title and main menu will be displayed.

SECURITY

A security system is incorporated in PURCHASING PRO 2000 PLUS PLUS to provide limited access of the individual programs and data so that only duly authorized personnel can view or change data. Each employee of the company is identified by name and each is issued a unique password. In addition, the modules that the employee is permitted access are designated. Five levels of security are provided to limit the activity of the employee in that module.

Level 1- System Administrator
    Enters security passwords
Level 2- Personnel
    Access to employee records and labor rates
Level 3- Manager
    Access to all other records, data and management reports
Level 4- Operator
    Access to all other records and data.
Level 5- Review
    Can only view summary records, cannot change data.

Only employees with security Level 1 have access to the security portion of the system. To access the security setting, select “SUPPORT” from the main menu of the PURCHASING PRO 2000 PLUS PLUS module. Then select “EMPLOYEES”.

The employee designated as the system administrator (by setting the security level for that employee to 1) should enter the security level and password for each employee. *Note that only the employee(s) with Level 1 security will have access to this screen. Be sure the at least one employee has the Level 1 designation before deleting the "DEMO" employee from the employee list.* The PURCHASING PRO 2000 PLUS PLUS system is shipped with an employee named "DEMO" with the password "DEMO" and security level 1 so there is initial access to the security screen.

PROGRAM STRUCTURE

HELP SCREENS

Each of the modules is supported by extensive on line help that is accessible at every window. Help may be accessed from either the help contents selection from window menus or by selecting the "Help" button on each window.

SAMPLE DATA

PURCHASING PRO 2000 PLUS PLUS is supplied with sample data simulating a manufacturing business. The data is automatically provided during the installation process. It is strongly recommended that this data be left on the system until the user becomes thoroughly familiar with all the features of the program. While becoming familiar with the program this sample data may be modified, or additional data may be entered. For each new window it is suggested the user read the help associated with the window. Follow the instructions for adding, modifying or deleting data and records.

After becoming familiar with the features of PURCHASING PRO 2000 PLUS PLUS the sample data may be removed individually from the appropriate windows using the delete method provided for that window.

STRUCTURE

The PURCHASING PRO 2000 PLUS PLUS program is designed to be extremely simple to use and to provide the maximum amount of information using very few windows. For example the "PO's" icon will display all the purchase orders with the pertinent data, including all line items, for the highlighted selection. Selecting the "Change" selection button will immediately provide the user with detailed data about the purchase order or line item that is selected. Buttons are provided so that complete detailed data about either the purchase order itself or the line item records can be easily retrieved.

The program is constructed using several basic window types: Menus, Scrolling Tables, Data Entry windows, and Reports

Menus: Selection of area of interest.
Scrolling Tables: a list of available records.
Data Entry window: Individual detail data about a selected record.
Reports: Print out of information.

To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data. When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

Tables:

[PgDn] scrolls the table to the next page of data.
[PgUp] scrolls the data to the previous page of data.
[Ctrl-PgDn] scrolls the table to the last page of data.
[Ctrl-PgUp] scrolls the table to the first page of data.

Forms:

[Tab] accepts the data entry for the highlighted field and advances the highlighted cursor to the next field. When the last field is accepted all the data is saved for the record and control returns to the table window.
Select "OK" button to accept all the data from any window.
Within a highlighted field move the cursor to the desired location using the mouse or the left and right arrow keys. Characters may be deleted with the [Delete] or [Backspace] keys.

BACKING UP AND RESTORING DATA FILES

The Backup and Restore feature is intended to be used to back up all the data files (*.tps) residing in the base directory for the program. The Backup and Restore feature can be run from within the main program or can be run from the BACKER.EXE file in the base directory. The Backup and Restore feature may be accessed only by the System Administrator (Security Level 1) or a Manager with Security Level 2.

The data is stored in a compressed form, on disks or in the hard drive, to conserve space. Every time a backup is carried out a unique Set Number is allocated and stored on each floppy in the disk set. During Restore the user can click on the Log File button to see the Set Number, Disk Number, Date of Back Up etc. If you insert a disk from the wrong set or out of sequence you will be warned accordingly

Starting the Backup and Restore feature: from the main menu select File, then BACKUP and RESTORE.

To Backup all the data files (*.tps) simply select the BACKUP icon and follow the instructions. Alternately, double click on the BACKER.EXE file in the program base directory.

To Restore all the data files select RESTORE and follow the instructions. After Backup or Restore the user will automatically exit from the program (since all program data files must be closed during the Backup process).

The backup files and the files that were backed up are displayed by selecting the Log File button.

TECHNICAL SERVICE

Unlimited technical support for PURCHASING PRO 2000 PLUS PLUS is provided for one year from the date of purchase. Before contacting technical support make use of the Help functions that are available at each window. Contact BDR Systems customer service at 610-873-8570 or e-mail at address plant@bdrsystems.com (be certain to type the address exactly as shown, do not use capital letters).

The PURCHASING PRO 2000 PLUS ISO professional procurement system is comprised of seven major sections: Support, Purchasing, Receiving, Inventory, Vendor Management, System Setup and Reports. The integrated system is designed to initiate and track every purchase order and line item, maintain accurate inventory, and provide vendor rating and management. The documentation of purchasing data and inspection results is specifically designed to provide record retention and traceability to assist in achieving the requirements of ISO9000. The system also provides valuable management information to analyze and evaluate the effectiveness of the PURCHASING PRO 2000 PLUS program, the rating and performance of vendors, and provides a vendor corrective action system. Changes to purchasing records are logged for traceability. A full featured receiving inspection system is included in the program.

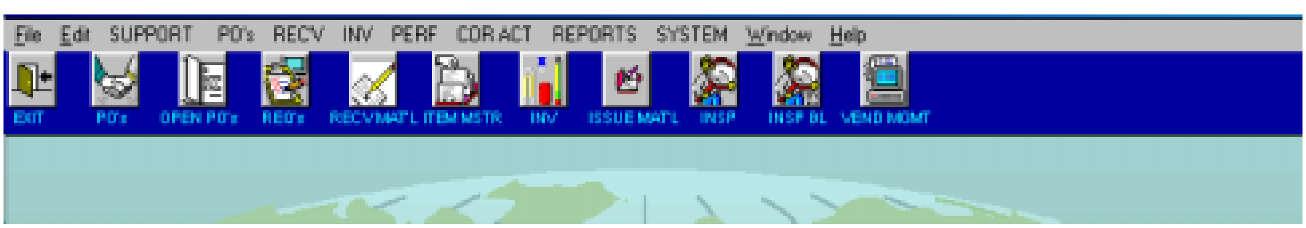
Major features include:

- Inventory Master
- Inventory System
    - Min/Max
    - Transaction Tracking
- Inventory Pick System
- Purchase Request System
- Purchase Order Generation from Requests
- Requisition and PO Approval feature
- Approved vendor selection feature
- Receiving and Receiving Inspection
- Receiving System
- Vendor Performance Rating
    - Order Completeness
    - Delivery Performance
    - Quality Performance
- Vendor Performance Summary
- Automatic Generation of Vendor Rating Letters
- Automatic Generation of Corrective Action Letters
- Data Backup and Restore feature
- Purchasing Changes logged

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records.

USING PURCHASING PRO 2000 PLUS

Purchase orders may be initiated either through the conversion of a purchase request or directly from the purchase order section.



Selections may be made from the menu selection tool bar at the top, or the icon selection tool bar. Selections made in the menu selection tool bar result in drop down menus with additional choices. The icon selections provide rapid access to the most frequently used sections of the program When the cursor is placed on the icon the destination will be displayed.

To become familiar with the features and structure of the program the following tour of the program is recommended. Select the PO selection on the main menu. The sub menu provides selection of Purchase Orders, Open

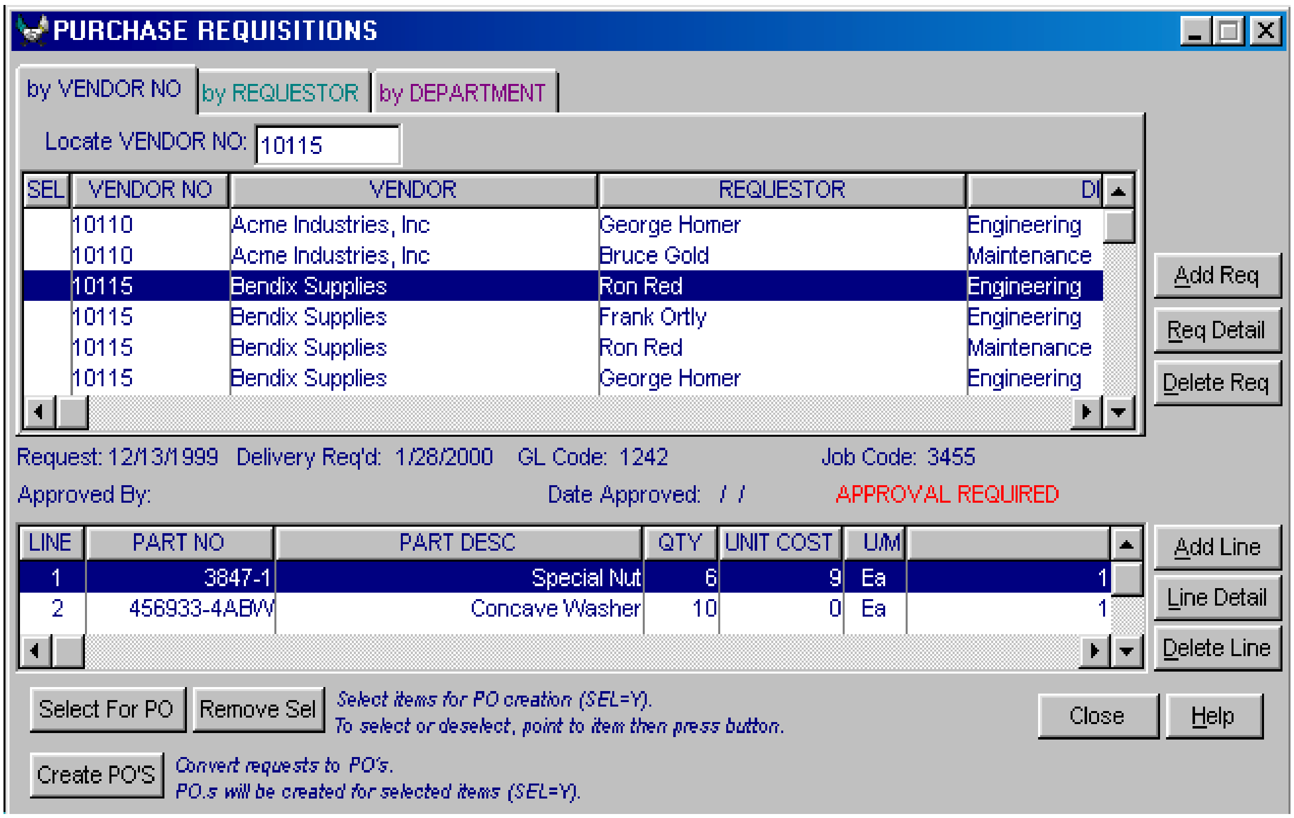
Purchase Orders, Requested PO's, Unapproved Requests, Unapproved PO's and Receive Mat'l.

The selections:

Purchase Orders: Complete access to all purchase order detail and purchasing history.
Open Purchase Orders: View all incomplete purchase orders
Open & Issued Purchase Orders: Open PO's that have been printed
Unapproved PO's: View all purchase orders that require approval
Unapproved Requests: View all purchase order requests that require approval.
Open PO Requisitions: Requisitions that have not been converted to PO's
Closed PO Requisitions: Requisitions thave have been converted to PO's
Vendor Purchase Order History: PO's and value for any period
Receive Mat'l: Enter the receipt of material against a purchase order

PURCHASE REQUESTS

Purchase requests may be made by any employee with the proper security level by selecting the "REQ" icon or selecting PO's, then Requested PO's from the main menu. Before a purchase requisition can be converted to a purchase order it must be approved by an authorized approval authority for the department.

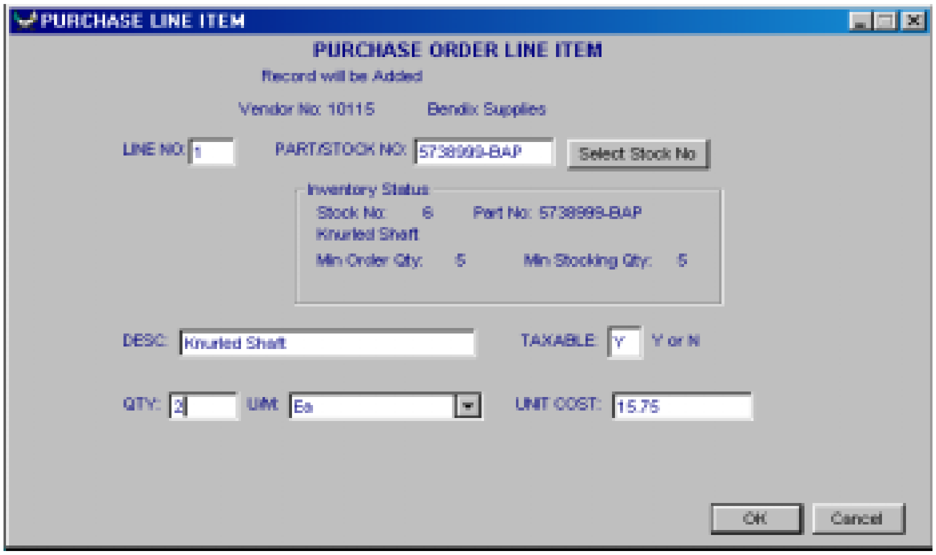


The purchase request window displays the list of all purchase requests in the upper table and the line items for the highlighted purchase request in the lower scrolling table. New requests or changes to existing requests may be made from this single screen and line items for selected requests may be changed or new line items added from this screen. This makes the purchase order request system extremely easy to use. Try making a new purchase request or follow the sequence by following the sample data provided.

To make a new purchase request select the "Add Req" button. To change or delete an existing requisition select the " Req Detail" button or "Delete Req" button respectively.

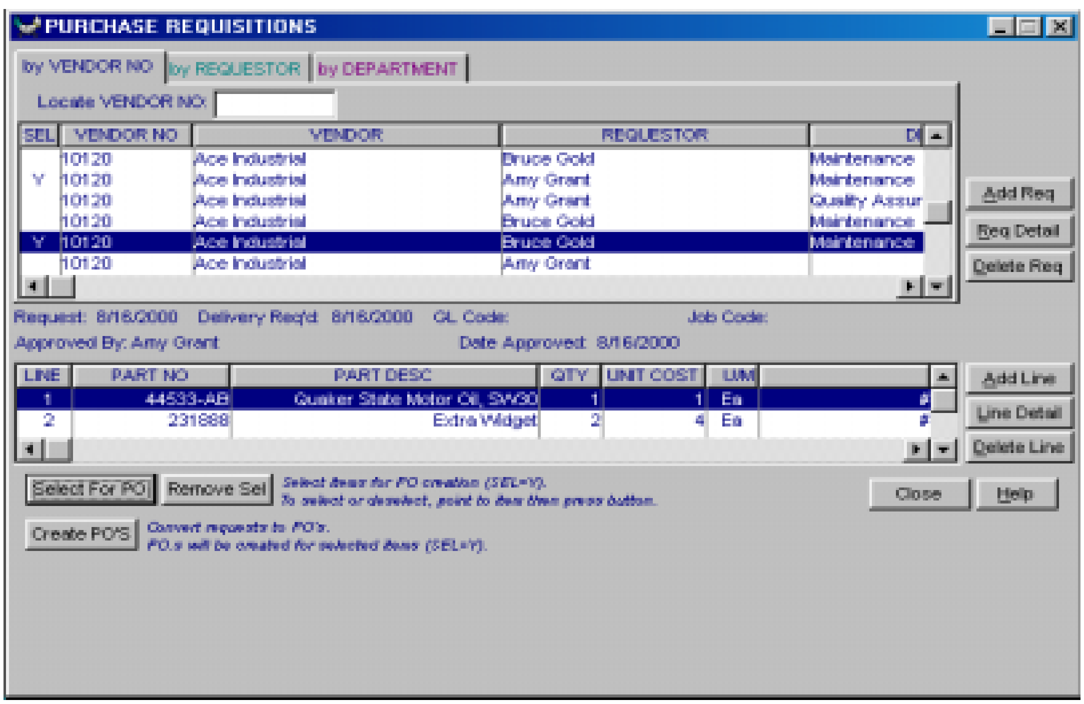
Purchase requests may be made for multiple line items provided a vendor for the part is specified. Vendors may be selected by using the "Select Vendor" or "Approved Vendor" drop down selection table. If the part requested requires an approved vendor only the approved vendor may be selected. If a vendor is not selected only one line item is allowed to be requested. This prevents mixing parts that require different approved vendors when the purchase requisition is converted to a purchase order.

To add new line items select the “Line Items” tab, then select the “Add Line” button.



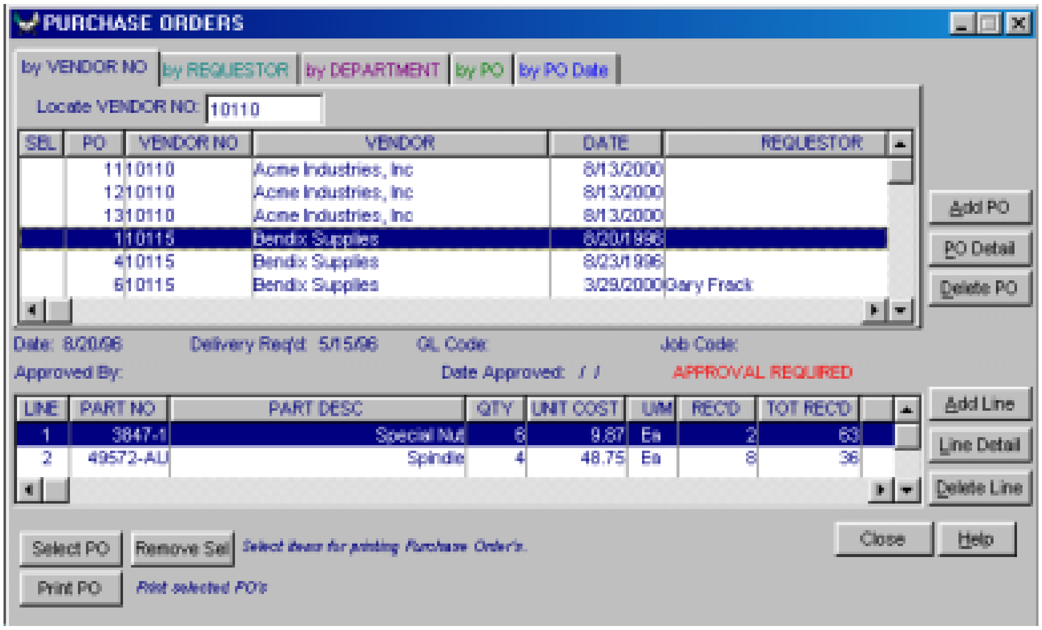
Before a purchase requisition can be converted to a purchase order, the requisition must be approved by a person designated in the Requisition Approval list for the department effected. The System Administrator is the only person permitted to designate the approving authority for the department. This is done from the SUPPORT, then Requisition Approvals selection from the main menu.

After the requisition has been approved, the requisition may be converted to a Purchase Order. Highlight the requisition for approval then press the Select Req button. A “Y” will be entered in the SEL column. When all requisitions to be converted are selected press the “Create PO” button. The newly created purchase orders are now in the Open PO category and are available for purchase order approval and printing.



PURCHASE ORDERS

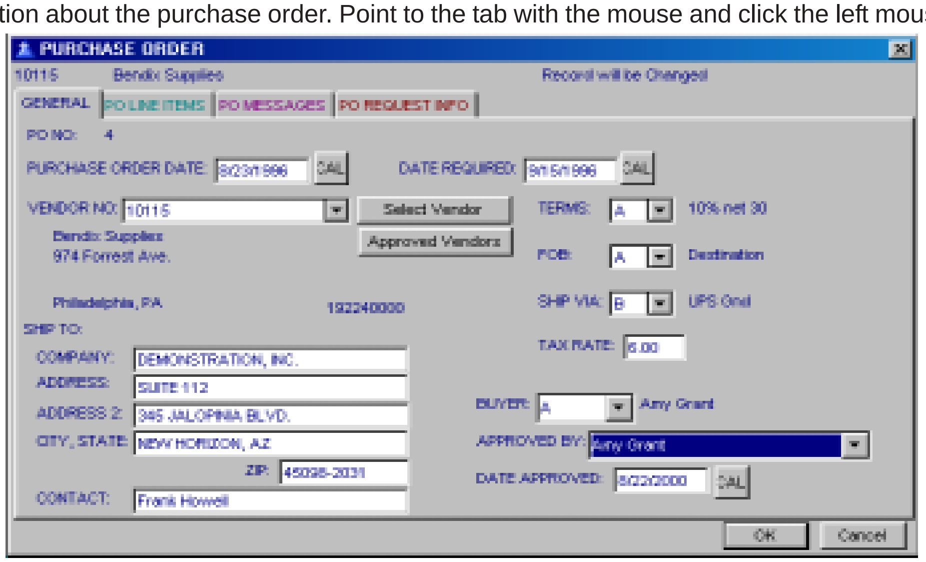
Purchase orders may be initiated from this section or existing purchase orders may be viewed, modified or deleted. Select the “PO’s” item from the purchasing menu or select the PO’s icon on the left of the tool bar.



The window is divided into an upper and lower section. The upper section contains a scrolling table with a listing of all purchase orders that have been entered into the system. The lower section contains a scrolling table with all the purchase order line items for the purchase order that is highlighted in the upper screen. Between the upper and lower tables is additional purchase order detail data for the purchase order that is highlighted. At a glance the user can review the purchase orders, line items, and other important information concerning the highlighted purchase order. Use the up and down arrows, selected with the mouse, to scan through the purchase order records. Notice how the purchasing records and detailed purchase order data changes for each change in highlighted purchase order. Without changing windows the user can select an purchase order record and view pertinent detail information about the purchase order and the purchasing history of that purchase order. Additional detailed information is available by selecting the appropriate button next to the purchase order or item scrolling tables.

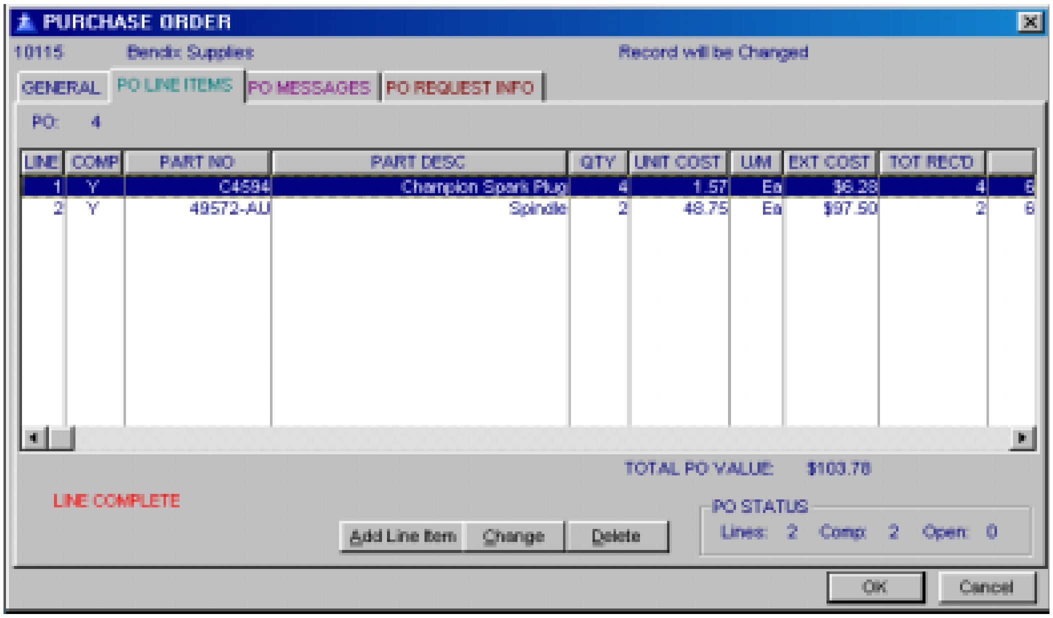
The purchase order data may be sorted and viewed by Vendor No., Requestor, Department, PO number, or purchase order date. Place the mouse cursor on the tab above the upper table and click the left mouse button to select the preferred sort.

Purchase orders may be generated individually from this screen or may be created directly from the Purchase Requisitions (see the Requisition section). To the right of the purchase order table are buttons to add, view detail, or delete purchase order records. Place the mouse cursor on the “PO Details” button and click with the left mouse button. Select the various Tabs to view the General PO information, PO Line Items, PO Messages, and PO Requestor information about the purchase order. Point to the tab with the mouse and click the left mouse button.



Purchase Order Line Items

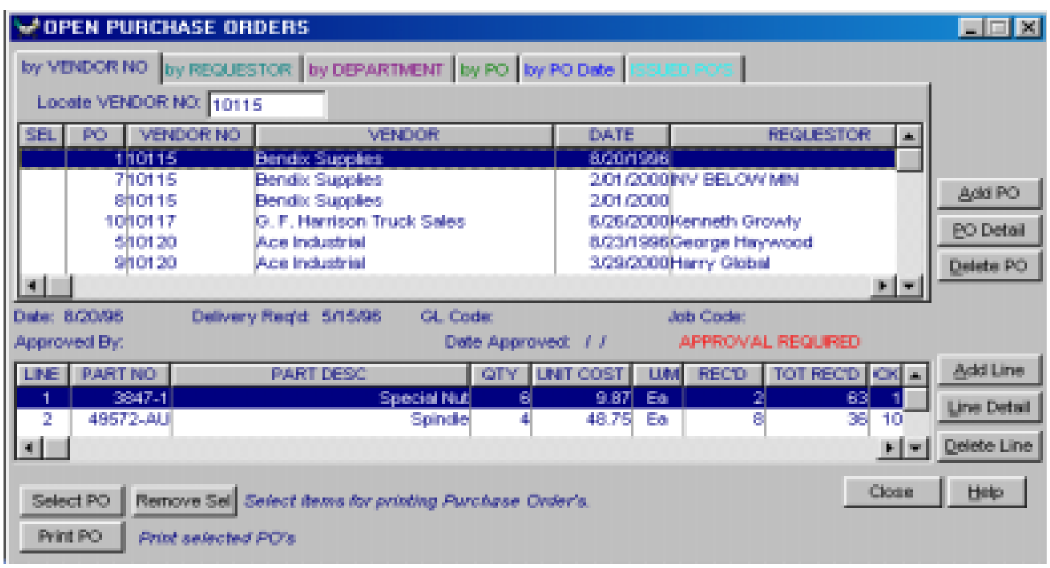
The lower portion of the purchase order window contains all the purchase order line item detail for the purchase order that is highlighted in the upper purchase order table. Each line item is listed with the status and pertinent inventory information. To view the details concerning a specific line item highlight the line item and press the “Item Details” button.



All the General information about the line item is shown.

OPEN PURCHASE ORDERS

The user may view all of the purchase orders which have not been completed by selecting the “OPEN PO’s” icon or by selecting the “PO’s” then “OPEN PURCHASE ORDERS” selection from the main menu.



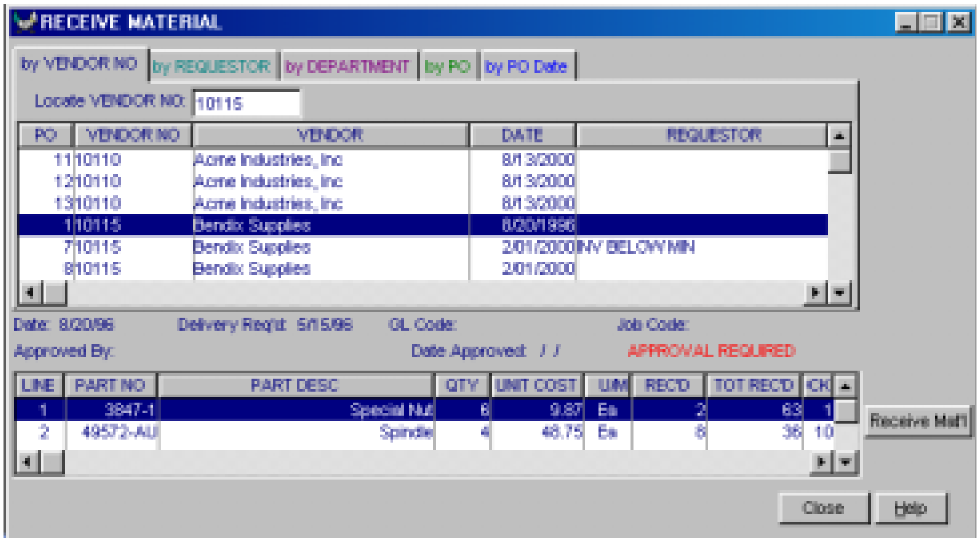
RECEIVING MATERIAL

To accurately track the purchase order system it is required to document the receipt of parts against the purchase order that was issued to a vendor for that part. Materials are received against outstanding purchase orders by selecting the “RECV MAT’L” icon or the “REC’V” then “RECEIVE MAT’L” selection from the main menu.

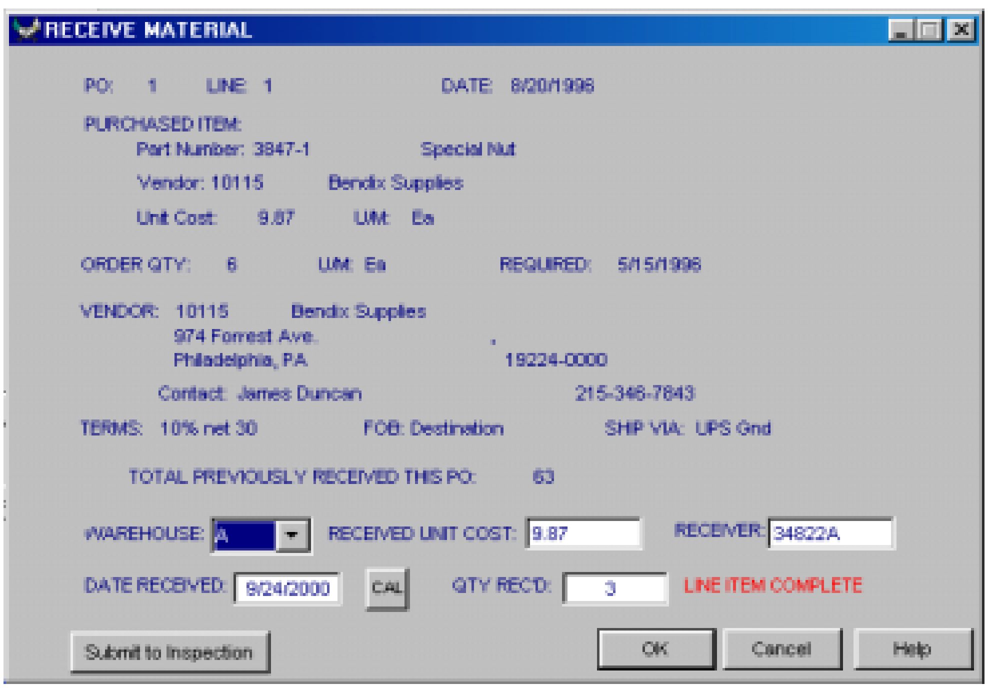
This table lists all of the current open orders. That is, those purchase orders for which there are one or more line items that the quantity of the item received is less than the quantity of the item ordered.

The table displays the open purchase orders, the vendor, the requestor, and other pertinent information about the purchase order. The lower table display all the line items for the open purchase order highlighted in the upper table.

Select the purchase order of the received part by using the mouse to position the highlighted selector bar on the correct purchase order. The user may sort the data by Vendor, Requestor, Department, PO or PO Date. Point to the desired sort tab using the mouse and press the left mouse button.



When the correct line item of the purchase order is selected point to the “Receive Matl” button with the mouse and press the left mouse button. Enter the receive date and the quantity received to update the status.



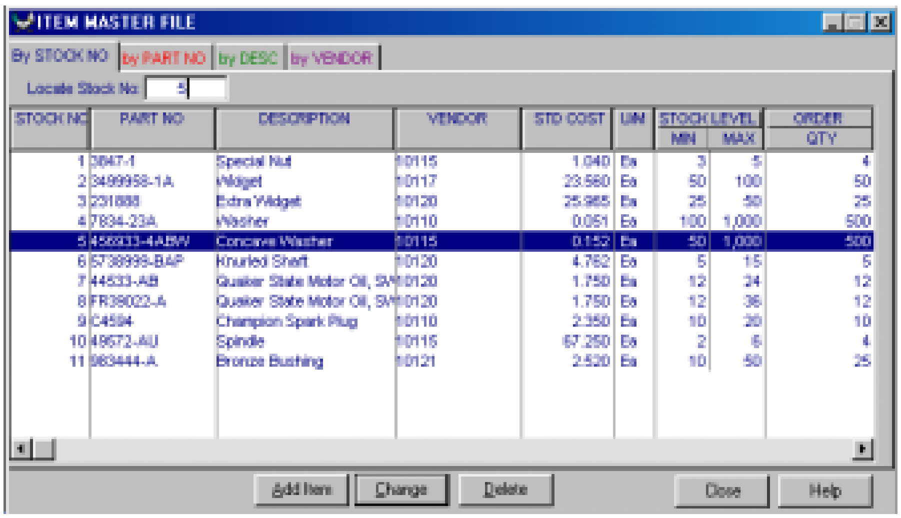
Enter the receiving warehouse, received unit cost, Received Date, and the quantity of the item received. Press OK to accept the receiving data.

INVENTORY

The "INV" menu selection consists of the "ITEM MASTER", which contains detailed information regarding every Purchasing part used, the "INVENTORY", which indicates the current status of each part and "ISSUE MATERIAL", whichdeducts the inventory used. The Inventory includes the vendor, last material transaction, and the current on hand balance. Whenever the on hand inventory falls below the minimum stocking level specified in the Item Master file as the result of part issuance the part is automatically added to the Purchase Order list for action by the user.

ITEM MASTER

Select "INV", then "ITEM MASTER" from the main menu or the "ITEM MSTR" icon from the tool bar. The Item Master file is displayed in a scrolling table which lists of all the parts that are used in the purchasing system. The data may be presented in the sorted order by Stock Number, Part Number, Description, or Vendor as indicated by the tabs. Point to the tab and press the left mouse button for the desired sort order.

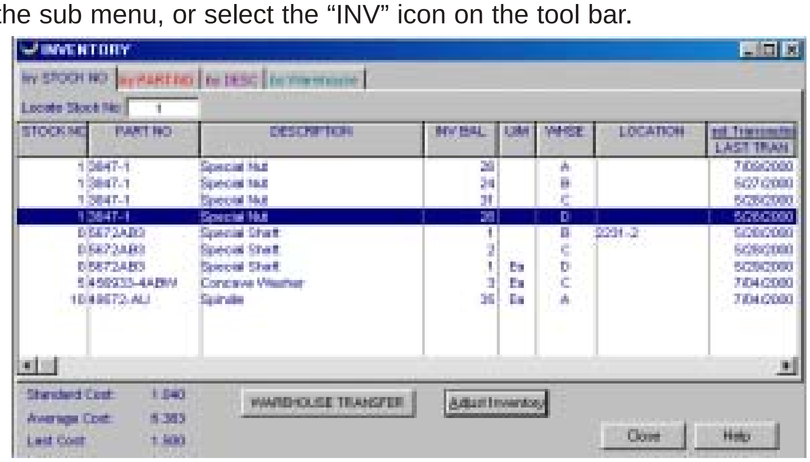


The pertinent data about each part is shown in the table. The cost, unit of measure, min and max stocking levels are indicated. Use the right scroll button to expose the quantity of the part that is currently on order. Additional detail about each part is available by selecting the "Change" button.

To add new parts to the item master file select the "Add Part" button using the mouse. To change existing data concerning the part position the highlighted selector bar on the desired part and select the "Change" button. To delete the entire part record select the "Delete" button.

INVENTORY

The inventory of parts on hand is accessed by selecting "INV" from the main menu, and then selecting "INVENTORY" from the sub menu, or select the "INV" icon on the tool bar.



To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see “Locate Part No:” above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

The current inventory status is presented as a scrolling table of all the parts in the item master file with the current inventory balance and latest transactions indicated. Use the right scrolling button to view the current inventory balance.

The data is presented in sorted order by either Stock Number, Part Number, Part Description, or Vendor as indicated on the tabs above the table. Point to the desired sort order tab with the mouse and press the left mouse button.

The “Last Transaction” section of the table indicates the date of the last transaction and the quantity that was either issued or received on that date. A part is issued when it is entered as used on a maintenance work order. A part is received when the part is entered as being received against an outstanding order in the purchasing system.

The inventory balance (the amount of parts physically on hand) may be adjusted as required. This may be the result of cycle counting of the inventory or by a complete physical count of all the inventory. If there is a variance of actual count to the computer inventory balance point to the “Adjust Inventory” button with the mouse and press the left mouse button.

SUPPORT

The “Support” menu selection contains the data that is used frequently in completing purchasing records, such as vendor names, employee lists, customers, units of measure etc. This data is used in drop down selection lists in the data entry sections to save the user typing time.

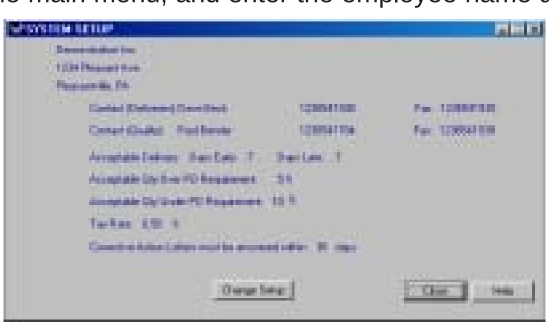
PURCHASING REPORTS

The “Reports” selection enables the user to obtain a wide variety of reports concerning the Purchase order, Purchasing, Procedures, Work Orders, and Management Analysis. Take the opportunity to explore the various report formats to fully understand the functions.

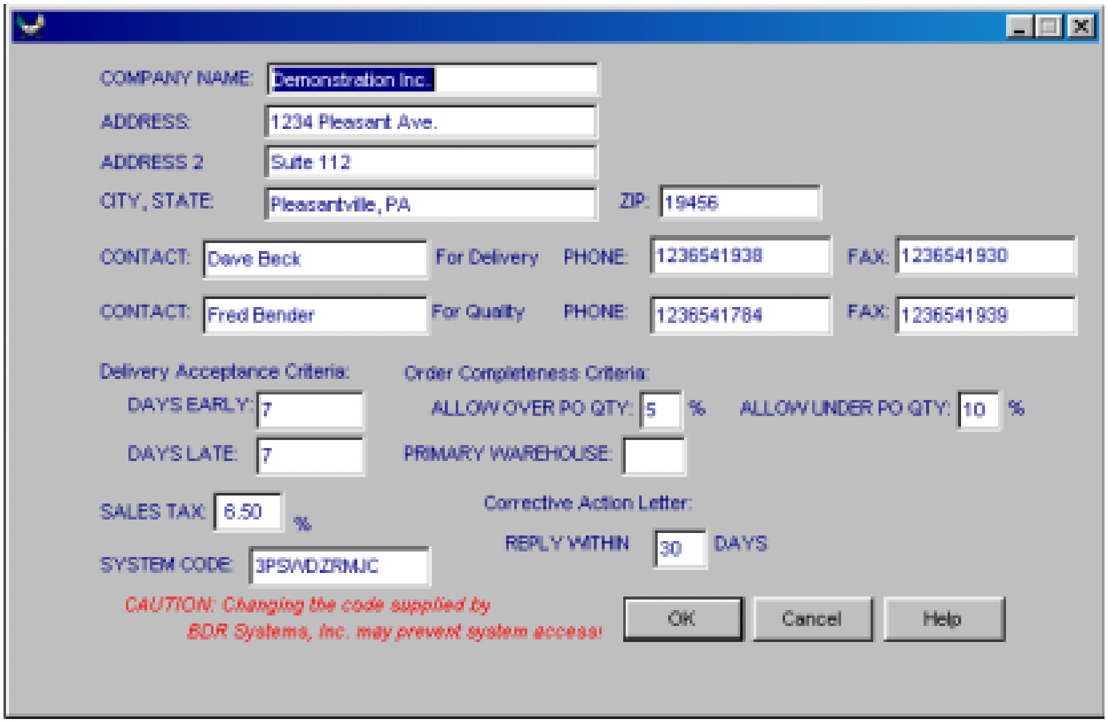
SYSTEM SET UP

The system set up section is used to enter basic information about the company and to enter data that is utilized in other portions of the program. It also contains the system code that is used to verify that the program has been purchased or is for evaluation only. Note: Do not change this code unless instructed by BDR Systems. Changing the code to an unauthorized value will result in the entire program being inaccessible. Only users with a security level of 1 (System Administrator) may change the system code field.

Select "SYSTEM" from the main menu, and enter the employee name and password to access the Security Set Up window.



The company name and other pertinent information is displayed. This information is used on all reports as well as the vendor performance letters and the corrective action letters. Also shown are variables used to determine vendor delivery and order completeness requirements. To enter new data, or to change existing data, select the "Change" button.



Enter the correct company information and the company contacts for delivery and quality questions.

The acceptable delivery criteria define the number of days early and days late that will be considered acceptable for a vendor delivery. If the delivery is made outside of the defined window the shipment will be considered late or too early. This will be indicated in the vendor performance rating for on time delivery. See Vendor Performance.

The order completeness criteria defines the acceptable order quantity variation that will be considered acceptable. This is expressed as a percent greater than or less than the required order quantity that will be considered acceptable. Delivery quantities outside this window will be considered unacceptable. This will be indicated in the vendor performance rating for order completeness. See Vendor Performance.

Enter the number of days that you wish the vendor to respond to corrective action letters.

Do not change the system code unless authorized by BDR Systems, Inc. This code will be changed when the system is purchased to allow unlimited data entry. See caution in the Security section.

VENDOR PERFORMANCE MANAGEMENT

A major strength of PURCHASING 2000 PRO is the vendor performance management system which provides vendor rating, vendor performance letters, and a vendor corrective action system to improve quality. This feature is comprised of six major sections: Receiving Inspection, Inspection Backlog, Vendor Performance, Corrective Action, Reports and System. The integrated system is designed to provide a complete receiving inspection history for all parts, information regarding items that are awaiting inspection (inspection backlog), vendor delivery information, and the inspection results. The system also provides valuable management information to analyze and evaluate the effectiveness of the inspection process. The

Receiving Inspection data is used to automatically generate vendor performance rating letters. The vendors are rated for completeness of order, on time delivery, and quality. Also, corrective action letters are automatically generated and tracked for any vendor that supplied defective parts. These letters detail the inspection results, require the vendor to specify the root cause of the defect, and the corrective action that the vendor will take to preclude reoccurrence of the problem. The response must be made within a user specified time period. The Corrective Action status system keeps track of each corrective action letter.

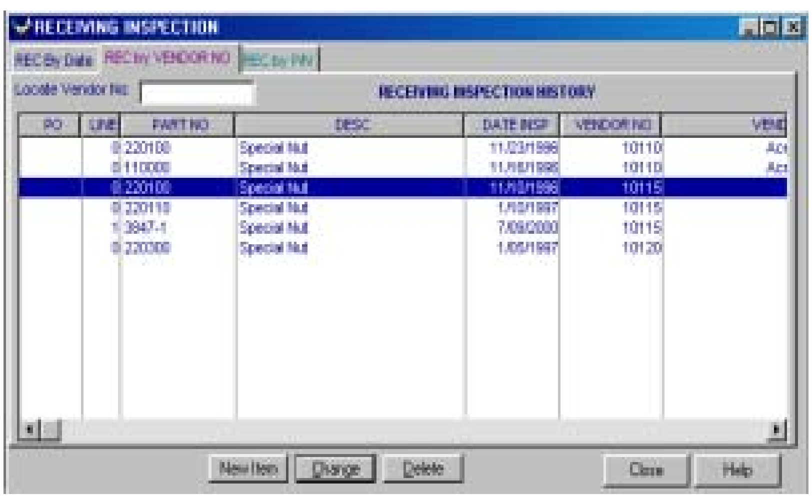
Major features include:

- Inspection Backlog
  - Days in Inspection tracking
  - Receiving delivery data
- Inspection History
  - All receiving data
  - Detailed data for each defect condition.
  - User friendly windows with tab selection of functions.
- Vendor Performance
  - Order Completeness
  - On Time Delivery
  - Quality
  - Automatic Issue of Performance Letters
  - Performance in any Specified Period
- Corrective Action System
  - Automatic issue for all or individual vendors
  - Defects for period automatically inserted
  - Automatic Issue of Corrective Action Letters
  - Tracking System

The system is provided with sample data to illustrate the functions of the various windows. It is strongly suggested that the user access and fully understand the function of each window and control to become thoroughly familiar with all the features before beginning the entry of active company records. To become familiar with the features and structure of the program the following tour of the program is recommended.

RECEIVING INSPECTION DATA

The receipt and subsequent inspection of the parts specified on the purchase orders is the basis for determining the delivery and quality performance of the vendor. Select the “REC’V” then the “REC’V IN-SPECTION” menu selection in the sub menu, or select the “INSP” icon from the tool bar. This will immediately provide the user with detailed data about the inspections that have been performed.



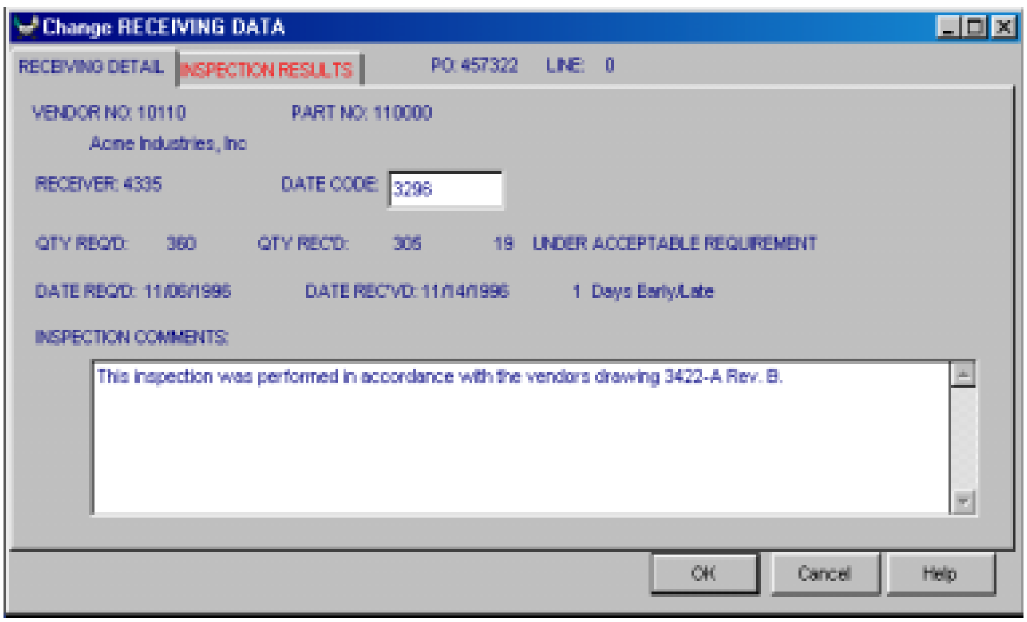
The receiving inspection system is designed for ease of use for the operator. The operator can enter inspection results directly into the system. All nonconformance are recorded with the requirement, the result, the quantity, and the disposition of the defective parts.

Every receiving or inspection action begins with using the "REC'V" selection, then “REC’V INSPECTION ” or "INSPECTION BACKLOG". Or use the “INSP” or “INSP BL” icons on the tool bar. Items awaiting inspection, or incomplete inspections, are displayed in the BACKLOG section. Either selection may be used to enter new receiving or inspection records.

Three tabs are available to instantly display the inspection data in the indicated sort orders. Simply place the mouse cursor on the desired tab and click the left mouse button.

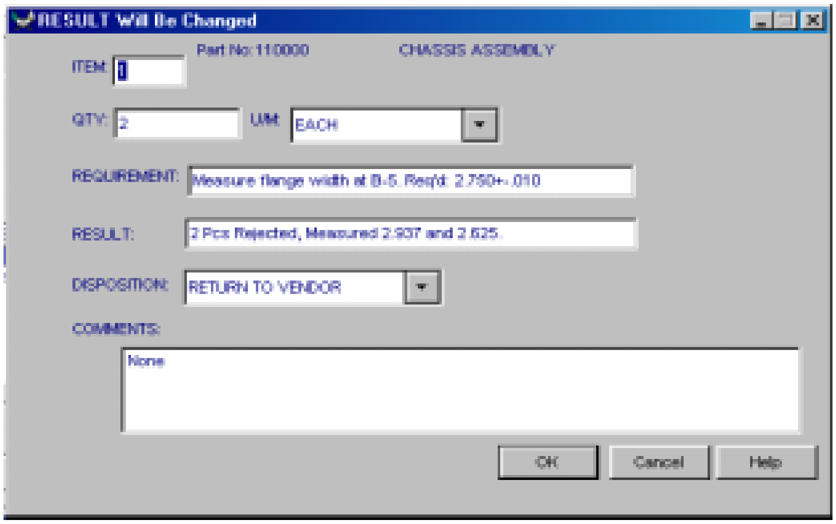
To rapidly access data, locate fields are included in the tables which are expected to contain a large amount of data (see "Locate Part No:" above). When the desired data is typed in and the tab key selected to accept the field, the table cursor goes immediately to the selection. Also, when the table records are in focus (the mouse cursor is pointed to a record), typing a single character will access the nearest record meeting that parameter. As additional characters are added the desired record is located.

To view or change the detailed information regarding the highlighted record place the mouse cursor on the "Change" button and click the left mouse button.



The inspection data for the selected part number is displayed in two sections, Receiving Detail and Inspection Results. Place the mouse cursor on the desired tab and click the left mouse button. The Receiving Detail section provides the data regarding the source of the part and the receiving and PO information about the part. To view the results of the inspection place the mouse cursor on the "Inspection Results" tab and click the left mouse button. The Inspection Results section provides the results of the inspection. The window is divided into an upper and lower section. The upper section contains pertinent information about the inspection. The lower section contains a scrolling table with the inspection results, usually only the items that do not meet requirements, for the inspection. The quantity of parts, the requirement and the results for that requirement are displayed. Any number of inspection results may be entered. Use the up and down arrows, selected with the mouse, to scan through the inspection records. If there are rejects for the inspection they will automatically be included in corrective action letters for this vendor, with all of the inspection results in the scrolling table included.

If the inspector wants to add an item, select the "Add Item" button. The next sequential item number will be assigned by the system. To view or change a specific inspection item, highlight the desired item in the lower table and select the "Change" button with the mouse.



If this is an added item the item number will automatically be entered as the next sequential number. Complete the field entries as required.

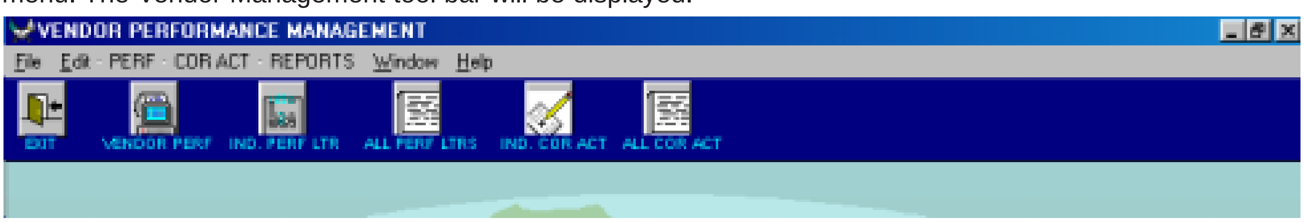
An unlimited number of details about an inspection may be entered by the inspector. For the quantity being inspected some pieces may be out of tolerance, some may have cosmetic defects, and other may be defective for other reasons. Each of these may be separately entered and individual dispositions of the pieces made. The inspector also has the flexibility to designate that the defect be included in reports and corrective action letters.

Indicate the disposition of the quantity of parts that exhibit the condition. Select from the drop down list of dispositions. Additional disposition descriptions may be entered in the support section of the program. See Support.

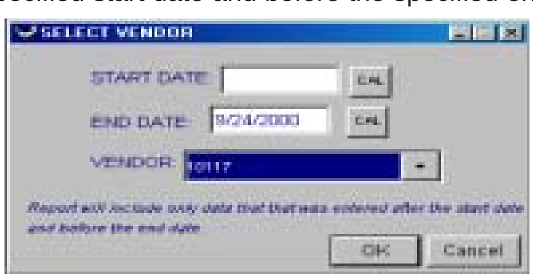
VENDOR MANAGEMENT

The performance of each vendor is evaluated by measuring the completeness of the orders received, the on time delivery performance, and the quality of the lot delivered.

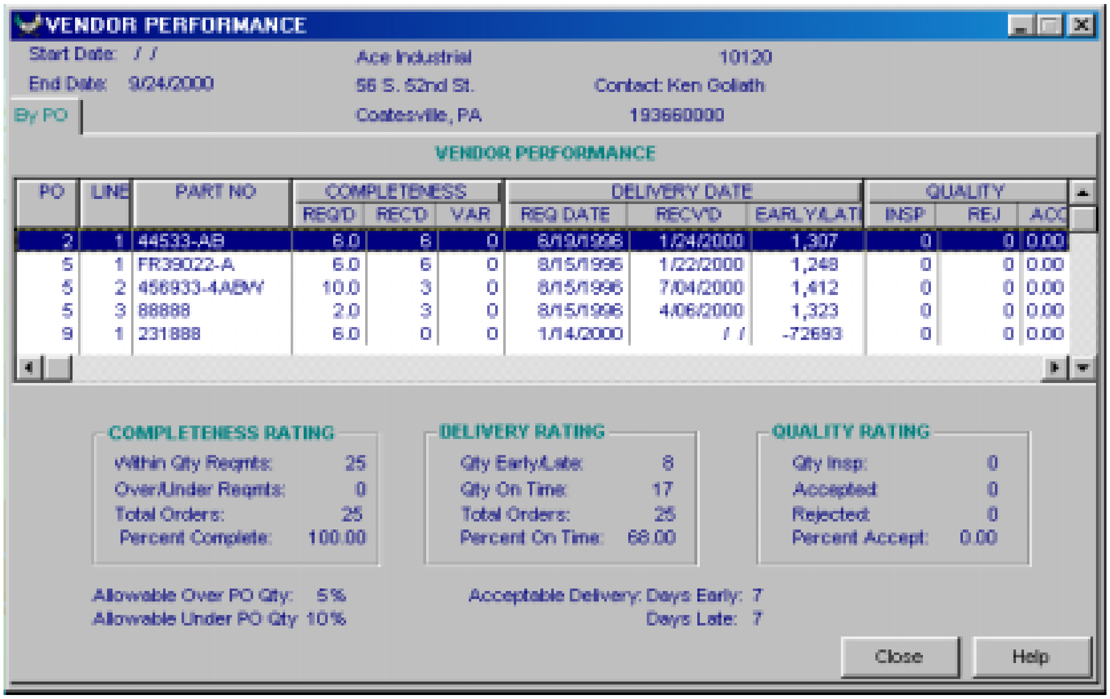
To view the performance of an individual vendor select the “VENDOR MGMT” icon from the main menu. The Vendor Management tool bar will be displayed.



Select “PERF then "VIEW VENDOR PERFORMANCE", or "VIEW INDIVIDUAL PERFORMANCE", or select the Vendor Performance icon from the tool bar. The vendor selection window is displayed. The performance of the vendor over a variable period of time may be specified. The display will be based on all inspection data after the specified start date and before the specified end date.



Enter the period start date and end date desired. Only material inspected during the selected period will be included in the performance display. Enter the name of the desired vendor or use the drop down list, select the button next to the vendor field to highlight a vendor from the list. Click with the left mouse button to automatically enter the vendor name in the field. The performance data will be displayed.



The performance data for the selected vendor over the selected time period is displayed in the scrolling table. The data is displayed in either part number order or PO (purchase order) number order by selecting the appropriate tab.

The completeness rating is a measure of how well the vendor performed in satisfying the quantity requirements of the purchase order. The user specifies the allowable amount of over or under quantities in the System Setup section selected from the main menu. See System. The current allowable limits are indicated at the bottom of the window as a percent of the purchase order quantity. The summary of the data is indicated below the scrolling table.

The on time delivery performance for the vendor is measured by the number of days the material was received before or after the required purchase order delivery date. The variance column in the table indicates the days greater than the allowable (indicated as a positive value) or the number of days the shipment was earlier than allowable (indicated by a minus value). The allowable amounts, specified by the user in the System Setup section, are indicated at the bottom of the window.

The quality performance for the vendor is based on the quantity of parts inspected and the quantity of those parts that were rejected. The individual percent acceptance and the summary total for the period are provided.

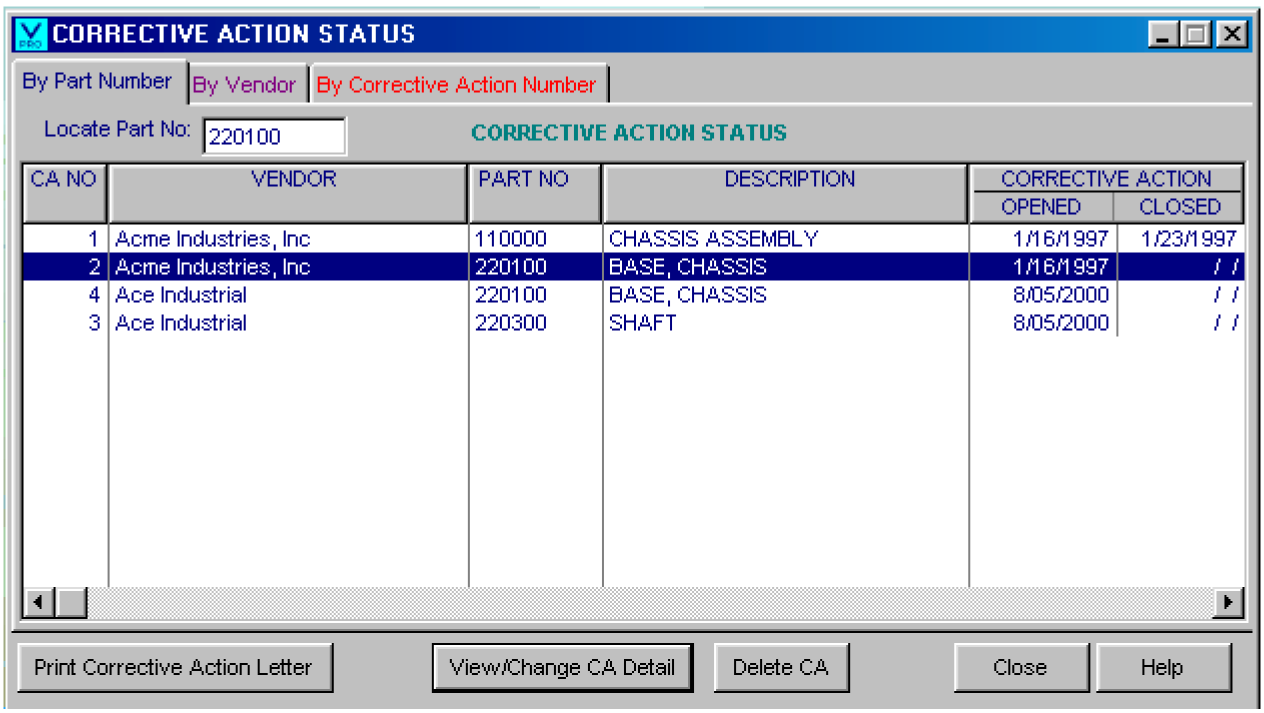
Vendor performance results are printed as a letter to the vendor by selecting either the "Print Individual Performance Letters" or "Print All Performance Letters" from the performance sub menu, or select the corresponding icons. The "Print All Performance Letters" selection will print a letter for every vendor automatically.

CORRECTIVE ACTION

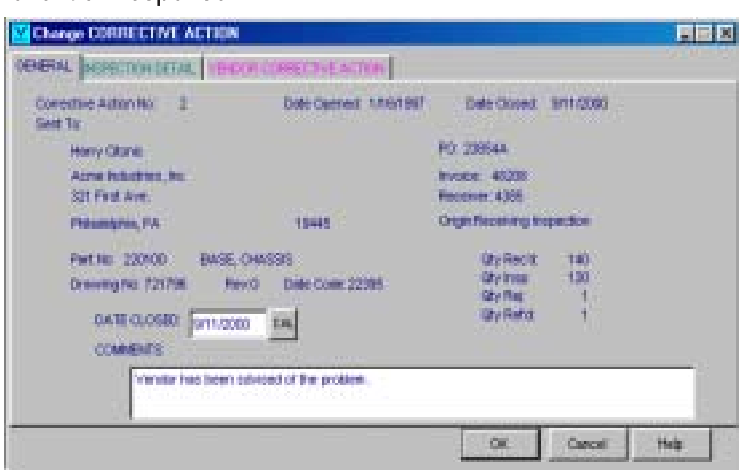
When defects are reported in the receiving inspection data the responsible vendor is notified and is required to determine the root cause of the defect and to put corrective action in place so that the defect will not occur again. The corrective action feature automatically generates a corrective action letter that includes the inspection results, assigns a corrective action number and provides a deadline for the vendor to respond with a corrective action plan. A tracking system is provided to provide the user with the status of all corrective actions.

To issue a corrective action the user must print a corrective action letter to the vendor, either individually or for all vendors over any specified period of time. For instance, you can automatically generate corrective action letters weekly or monthly covering the inspection results for that period. When the letter is issued the next sequential corrective action number is posted and the corrective action status will indicate an open corrective action to that vendor. When corrective action data is returned by the vendor, within the number of days specified in the System Set Up section, the Corrective Action data is updated and a completion date entered. The corrective action status will then be shown as “Closed”.

To access the corrective action system select “COR ACT” from the main menu then select "CORRECTIVE ACTION STATUS", or select the “ALL COR ACT” icon.

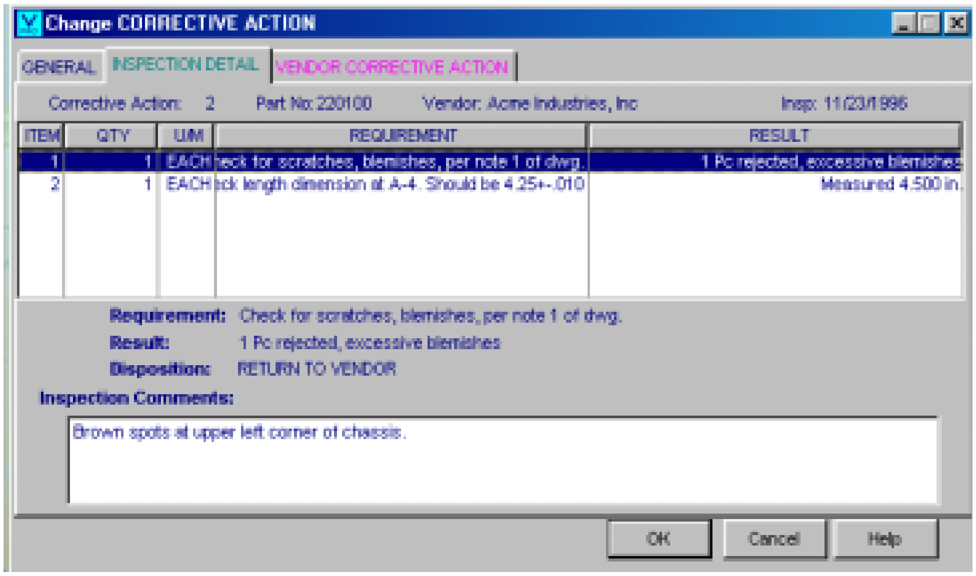


The Corrective action status shows the current status of each corrective action that has been issued, the date opened, and the date closed. Click on "Print Corrective Action" to obtain a copy of the corrective action. Click on "View/Change CA Detail" to update the data or view the inspection results, the vendor root cause and prevention response.



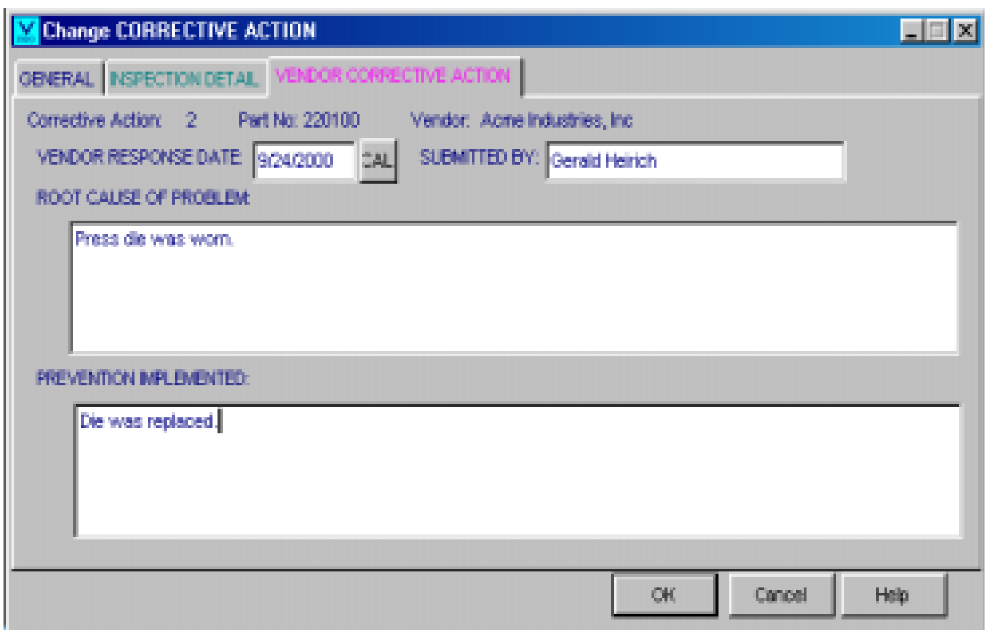
The General section displays the body of the corrective action letter that was generated with comments relative to this corrective action. When the corrective action has been satisfactorily answered, after the "Root Cause of Problem" and "Prevention Implemented" fields of the Vendor Corrective Action selection have been satisfactorily answered, enter the completion date. The entry of the completion date "closes" the corrective action.

To view the inspection data associated with this corrective action select the "Inspection Detail" tab.



The inspection detail regarding this corrective action is displayed with comments concerning this corrective action.

Add a new vendor response or review a response by selecting the “Vendor Corrective Action” tab.



The vendor should determine the root cause of the defective items listed in the Inspection Detail section. When received, enter this information in the "Root Cause of Problem" field.

The vendor is required to determine the prevention that has been put in place to prevent this problem from ever occurring again. This is really the heart of the corrective action program. Quality improvement by the vendor can only occur if effective preventive action has been implemented. When the preventive measures are acceptable, enter the action taken in the "Prevention Implemented" section.

VENDOR MANAGEMENT REPORTS

The report section provides an extensive choice of inspection reports to analyze the inspection data over any user selected time period.

To access the report menu select "REPORTS" at the main menu of the Vendor Management tool bar.

A powerful preview feature of the report on screen is provided for each report type. This allows you see the format of the report and the data selected for the report, before it is actually printed. The user, therefore, can review the data and make any necessary changes to the time period or choice of other variable before printing.

To view the body of the report on the screen in more detail select "Zoom" with the mouse and then select the desired magnification, such as 75% to more clearly view the data.

Select the print icon or select "File" and then "Print" to send the report to your printer.

The content of each report is described by the title of the report. It is suggested to print a copy of each report to become familiar with the method of entering the period data. The user can specify the time period of data to be included in the report.

AFTER THE TOUR

After becoming thoroughly familiar with the various menu selections, experiment with the sample data provided by changing and adding records in each of the data areas. When the user is comfortable with the program remove (delete) the sample data and enter data pertaining to the company. Start by entering the known data in the Support files section. Then enter the inspection data using the REC’V INSP menu selection, or the corresponding icon.

DATA CHANGE LOG

The PURCHASING PRO CHANGE LOG selection from the FILE SELECTION of the main menu is used to view all changes to purchase orders, inventory records, and inspections on a field by field basis. By just logging field changes (and not whole records) the size of the log file can be kept down. The System Administrator (security level 1) is the only person authorized for access to the PURCHASING PRO Change Log.

The change log records all changes to purchase order records, inventory, and all inspection records. Periodically the accumulated data in the Data Change Log File should be purged to maintain only the necessary records required for tracking purposes.

The pertinent information about the highlighted changed record is displayed below the scrolling table, including the purchase order number, line number, part number, stock number, as well as the employee that made the change. The table displays the old value of the field, the new value, the employee that made the change and the date/time of the change.

A purge function, selected with the Purge Log Records button, is provided to delete all the records within the date range selected by the System Administrator.

It is good practice for the System Administrator to review the size of the PURCHASING PRO Change Log File (ActLog.tps in the root directory of the program) periodically to determine when file size reduction is appropriate.