

User Manual

Through V14.6

Windows shared-folder edition
Detailed workflows, full-screen details
and numbered usage arrows

Prepared 6 October 2026
Brand: TRM Pro
All illustrated records are demonstration data.

Keep this guide with the installed application.
Open it from the top-right HELP button.

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01 Start here: installation and daily workflow

Workflow • read before using the illustrated controls

1. Install the current Windows LAN package on each Windows 64-bit PC. Use Admin PC when creating the common data folder; use User PC when connecting another PC to that existing folder.
2. Choose one ordinary Windows PC to hold the shared data folder. Keep that PC switched on while other users work. Other PCs use a UNC path such as \\OFFICE-PC\TRMProData.
3. Open the desktop ToolRoom Manager Pro shortcut. First-time setup collects organization and Admin details. Verify the data location, activate the license and create employee/user accounts with the required rights.
4. Set up Master Data before planning: plants, departments, machine groups, machines, employees and projects. Create the process plan, then record completed production through Daily Data Entry.
5. Use reports to review progress and losses. Stores record receipts and issues separately. Open operation files from the saved plan for PDF, CAD and Fanuc program previews.
6. Use the top-right HELP button to open this manual inside TRM Pro. PREV/NEXT move one page, the page field jumps to a page, and DOWNLOAD PDF saves a separate copy.

Practical notes

This manual documents Windows application behavior through V14.6 and the bundled Help viewer. Screenshots use isolated demonstration records; they do not include your production database. Installer build numbers and application update numbers are separate. The final package is a Windows shared-folder edition; PostgreSQL, a cloud hosting service, SMS delivery and USB license dongles are not implied by this manual.

02 First-time organization and Admin setup

Workflow • read before using the illustrated controls

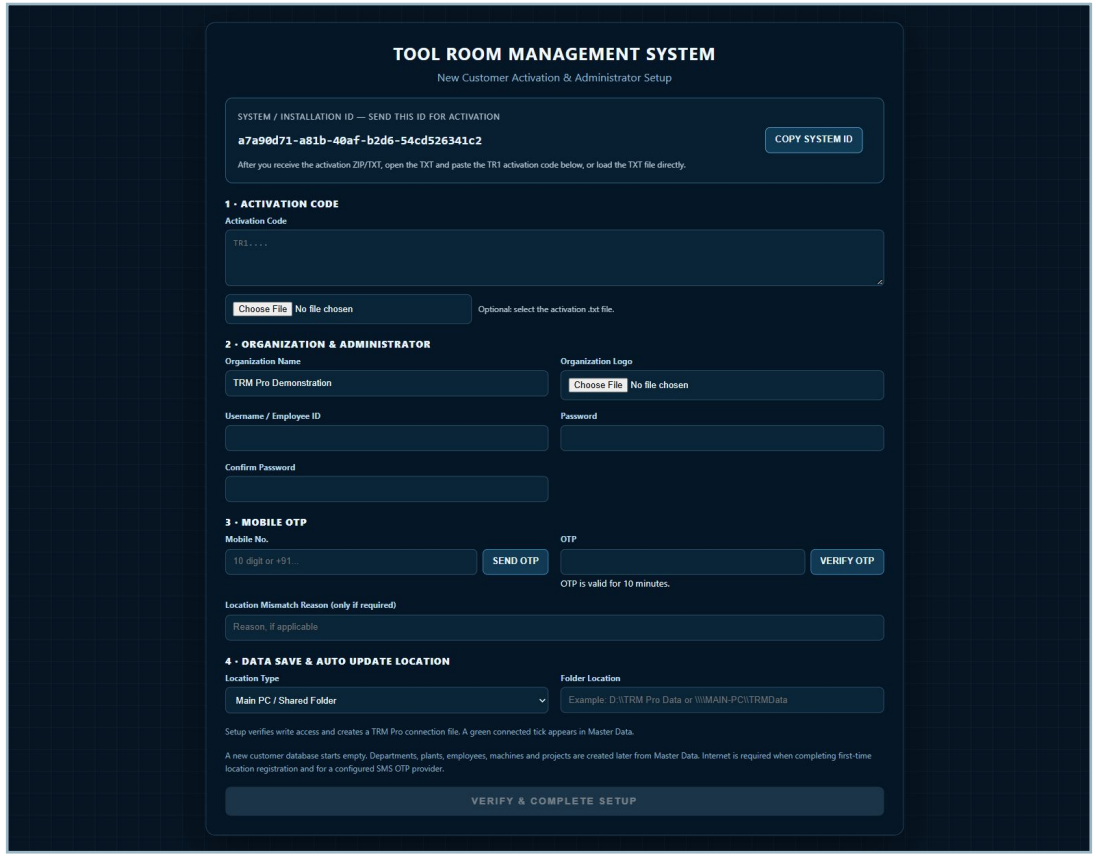
1. Enter the organization name, contact and other requested installation details. Use the real company details when installing, not the demonstration values pictured.
2. Create the first Admin account and retain its login details securely. Admin has full application rights and creates other users; this does not require every employee to have Windows Administrator rights.
3. Complete the verification fields presented by the installation. If SMS is not configured, use the installation support/development verification procedure rather than assuming a message will arrive.
4. Submit the setup once. On later starts, use the normal Employee ID and password login.

Practical notes

OTP delivery through MSG91 is not established in this build. A development OTP may be written to C:\ProgramData\ToolRoomWeb\otp_debug.txt. This file is for the installation administrator and must not be distributed with the installer. Existing registered-device login/logout should not require OTP every time; cleared registration, expired license or changed access can require verification again.

02 First-time organization and Admin setup

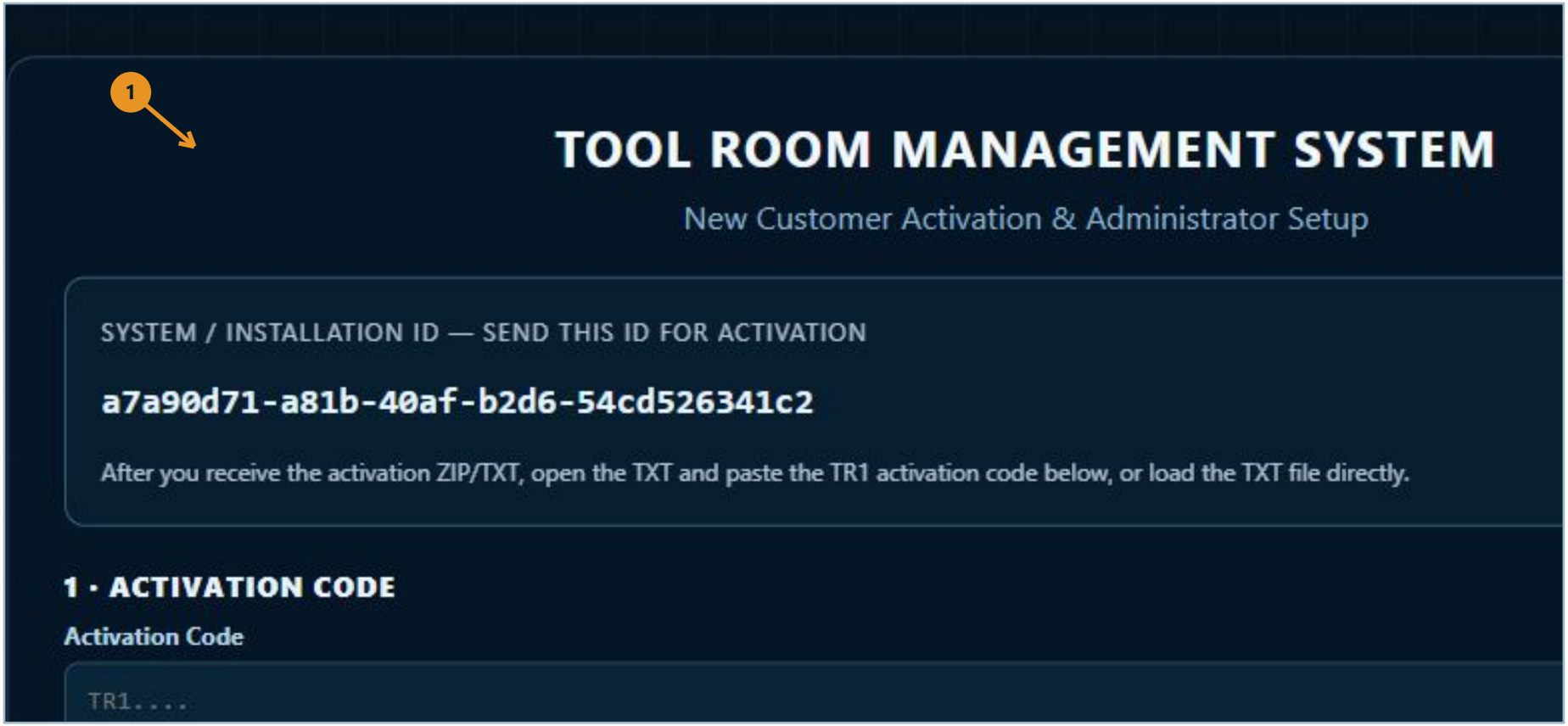
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 01 • orange numbers point to the named controls

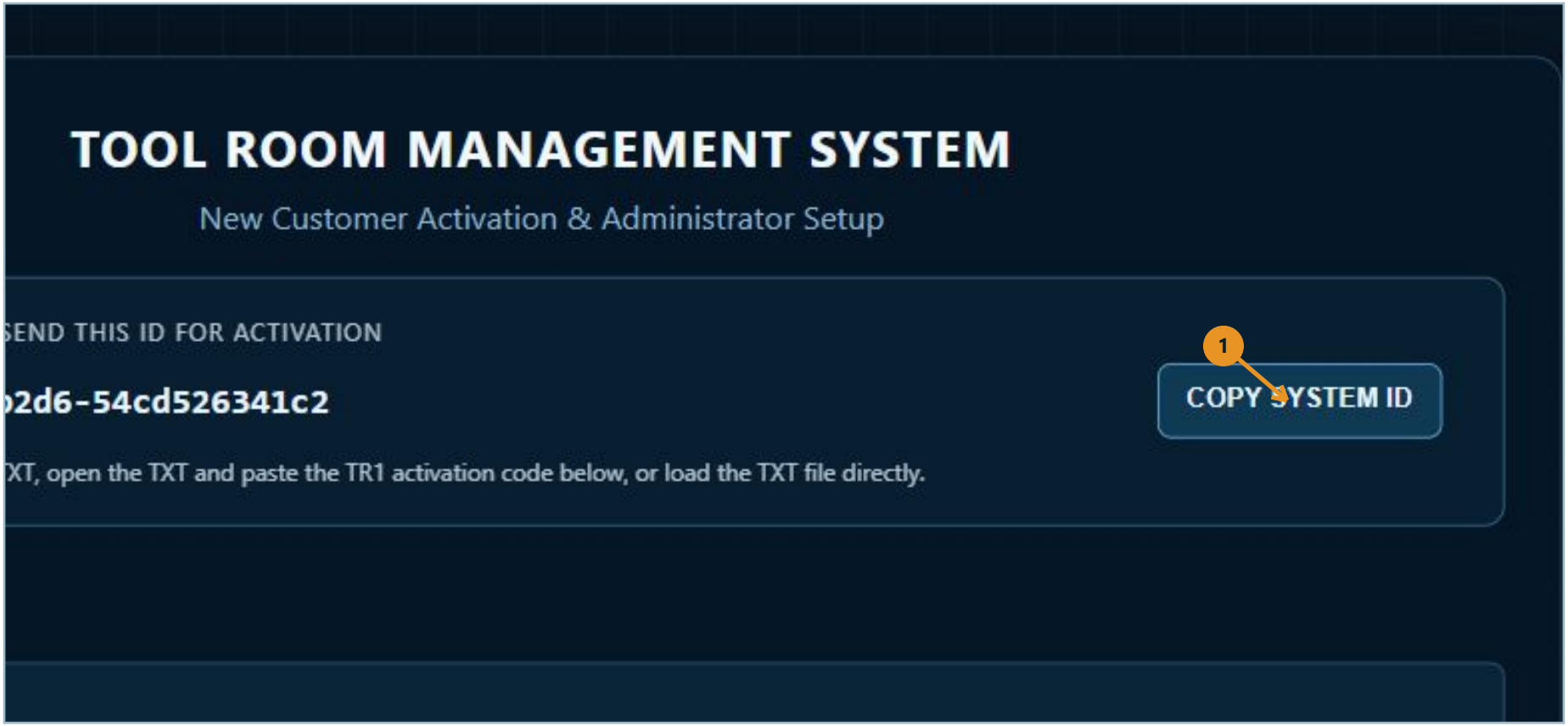


1. TOOL ROOM MANAGEMENT SYSTEM
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 02 • orange numbers point to the named controls

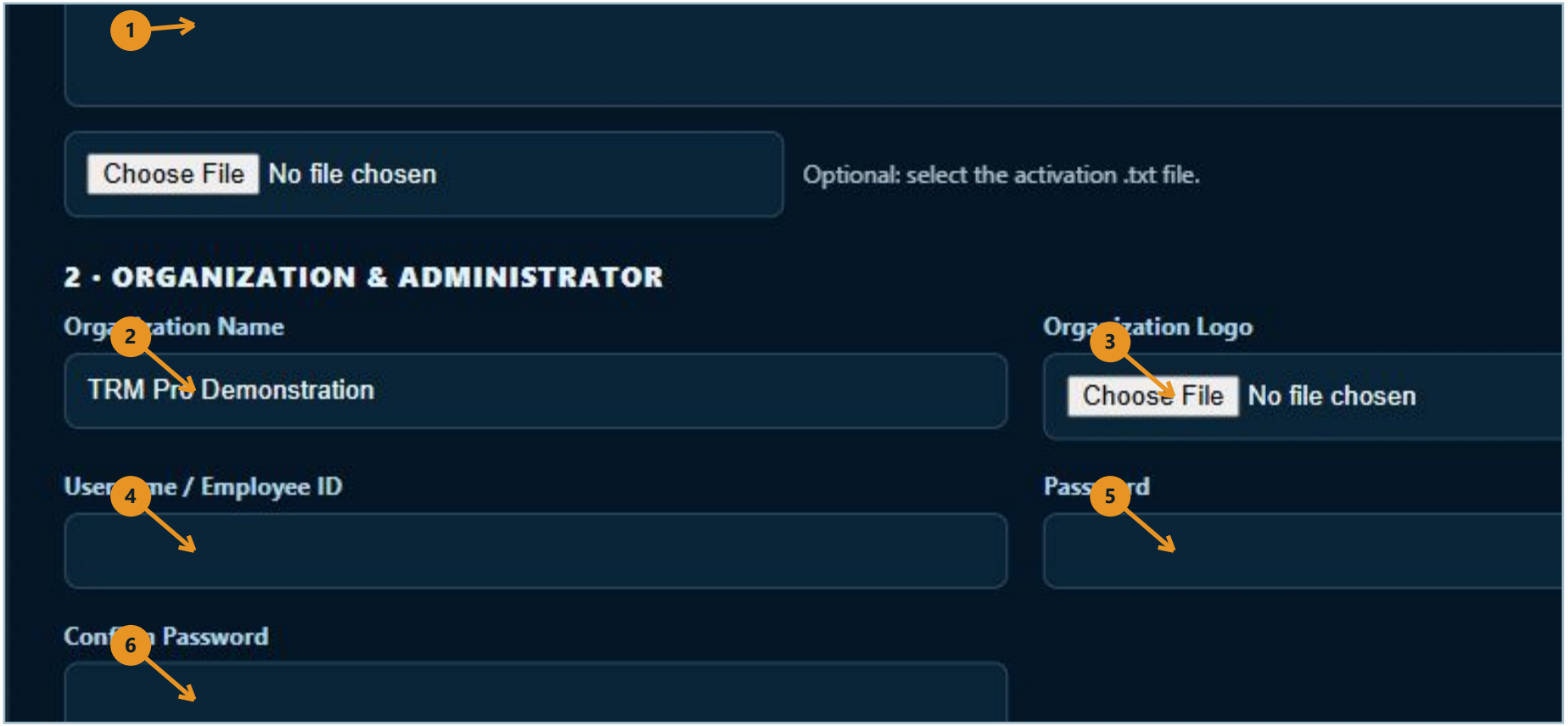


1. COPY SYSTEM ID
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 03 • orange numbers point to the named controls



1. Activation Code
Enter or review this value as labeled

2. Organization Name
Enter or review this value as labeled

3. Organization Logo
Choose the appropriate file from this PC, then use the corresponding upload/add action.

4. Username / Employee ID
Enter or review this value as labeled

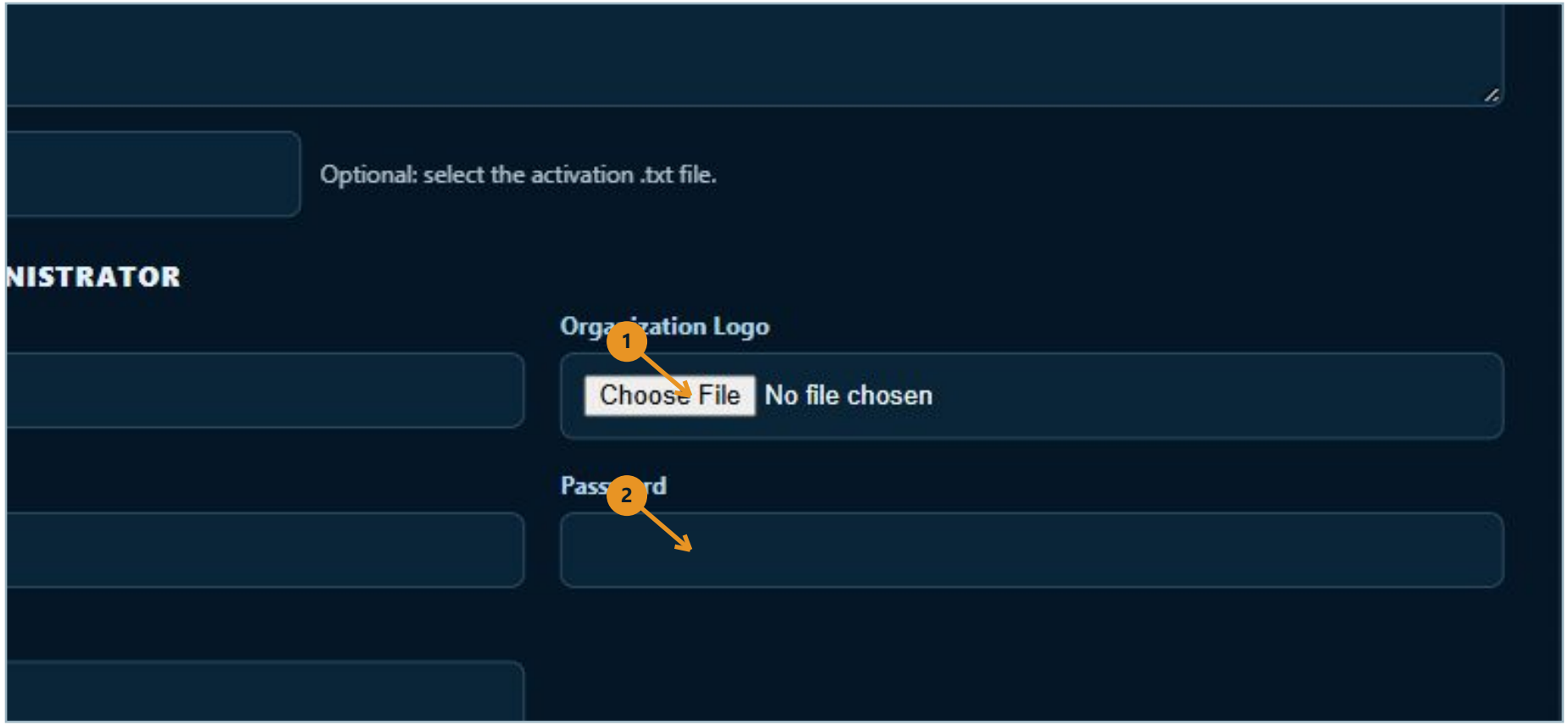
5. Password
Enter the account password carefully

6. Confirm Password
Enter the account password carefully

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 04 • orange numbers point to the named controls



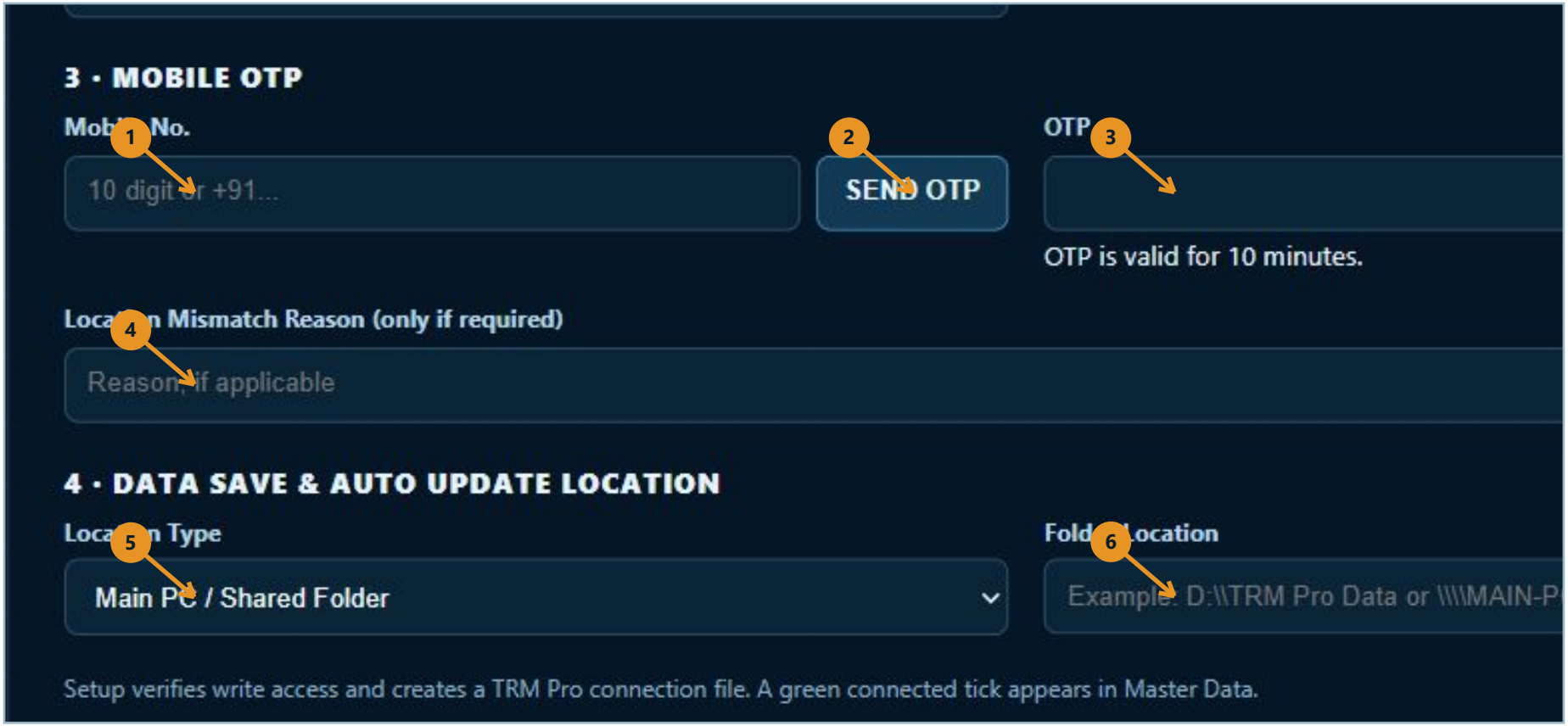
1. Organization Logo
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. Password
Enter the account password carefully

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 05 • orange numbers point to the named controls



1. 10 digit or +91...
Enter or review this value as labeled

2. SEND OTP
Use this named action/tab for the workflow described in this chapter

3. otp
Enter or review this value as labeled

4. Location Mismatch Reason (only if required)
Explain the actual cause

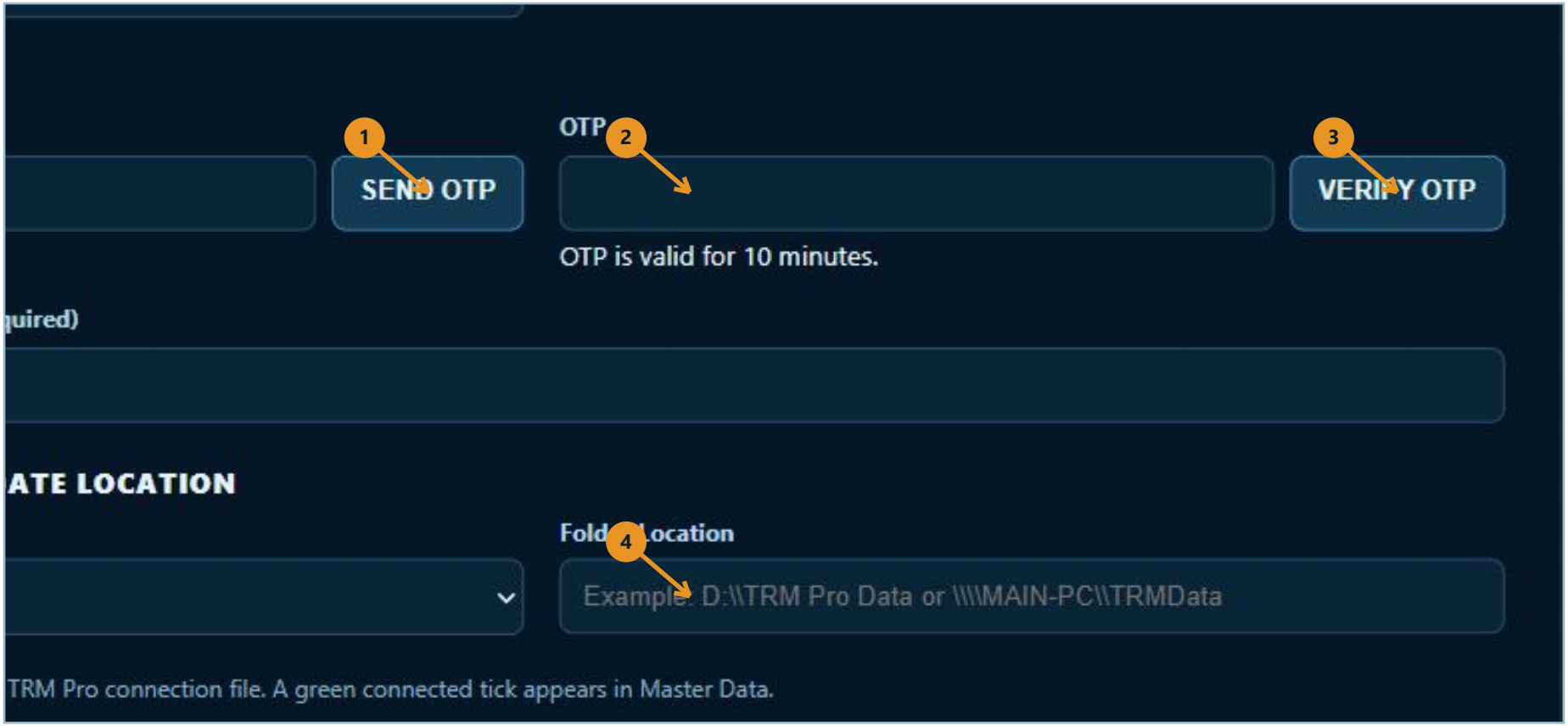
5. Data Location Type
Choose the required value

6. Folder Location
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 06 • orange numbers point to the named controls



1. SEND OTP
Use this named action/tab for the workflow described in this chapter

2. otp
Enter or review this value as labeled

3. VERIFY OTP
Use this named action/tab for the workflow described in this chapter

4. Folder Location
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 07 • orange numbers point to the named controls

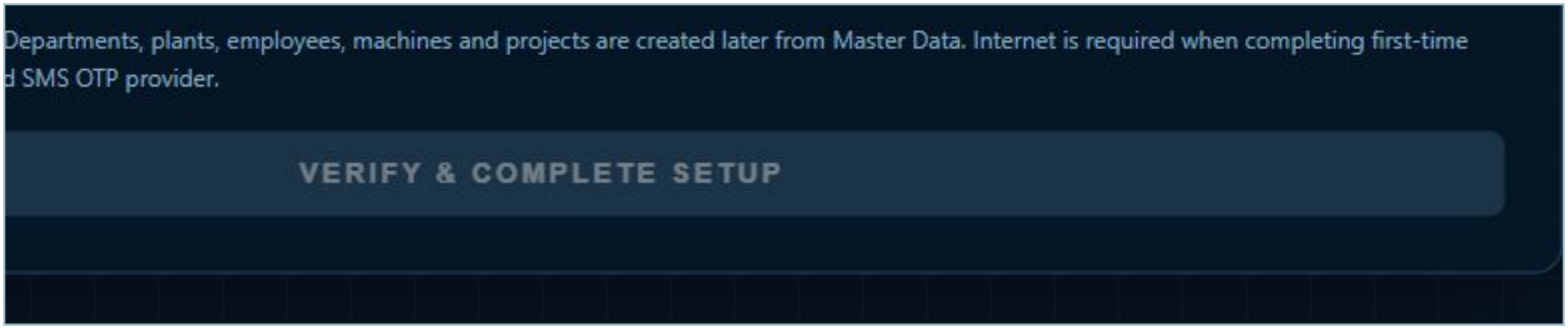


1. VERIFY & COMPLETE SETUP
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

02 First-time organization and Admin setup

Illustrated detail 08 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

COPY SYSTEM ID	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Activation Code	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Organization Name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Organization Logo	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Username / Employee ID	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Password	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
Confirm Password	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
10 digit or +91...	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SEND OTP	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
otp	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
VERIFY OTP	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Location Mismatch Reason (only if required)	Explain the actual cause. Idle Reason is required when Idle Time is greater than zero.
Data Location Type	Choose the required value. Available choices: Main PC / Shared Folder; OneDrive Folder; Google Drive Folder. The displayed records follow this screen’s scope and account access.
Folder Location	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
VERIFY & COMPLETE SETUP	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

03 License activation

Workflow • read before using the illustrated controls

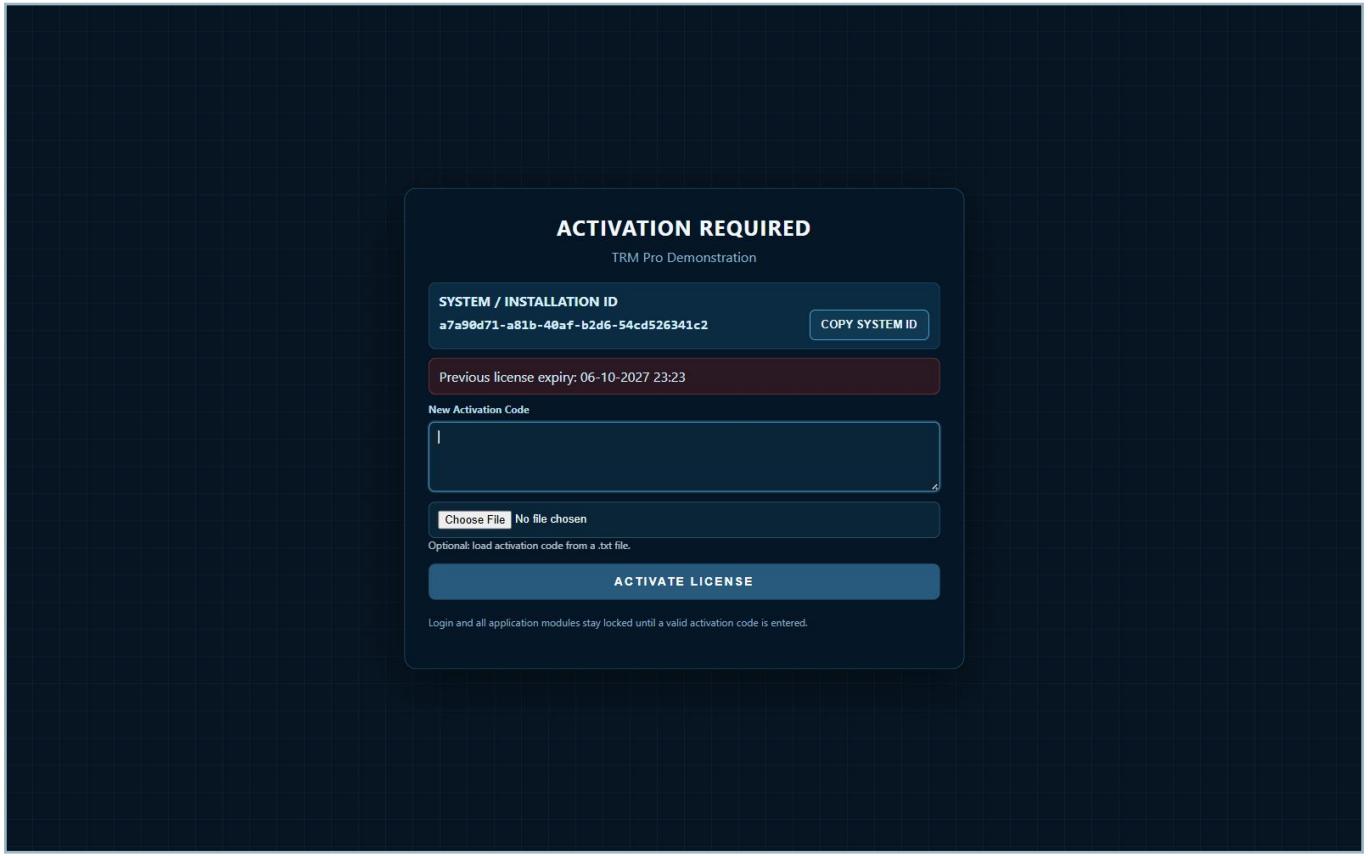
1. Check the current activation/expiry information before entering a new license.
2. Enter the license and verification information supplied for this installation. Follow the displayed ACTIVATE action.
3. If the license has expired or activation fails, contact the license administrator with the displayed information. Do not change the PC date to extend a license.

Practical notes

Current activation uses signed license codes. Current durations include 1, 3 and 12 months. USB hardware-key enforcement and developer-side online license reporting are not integrated. Their future availability must not be inferred from a USB installer menu.

03 License activation

Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

03 License activation

Illustrated detail 01 • orange numbers point to the named controls



1. ACTIVATION REQUIRED
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

03 License activation

Illustrated detail 02 • orange numbers point to the named controls



1. COPY SYSTEM ID
Use this named action/tab for the workflow described in this chapter

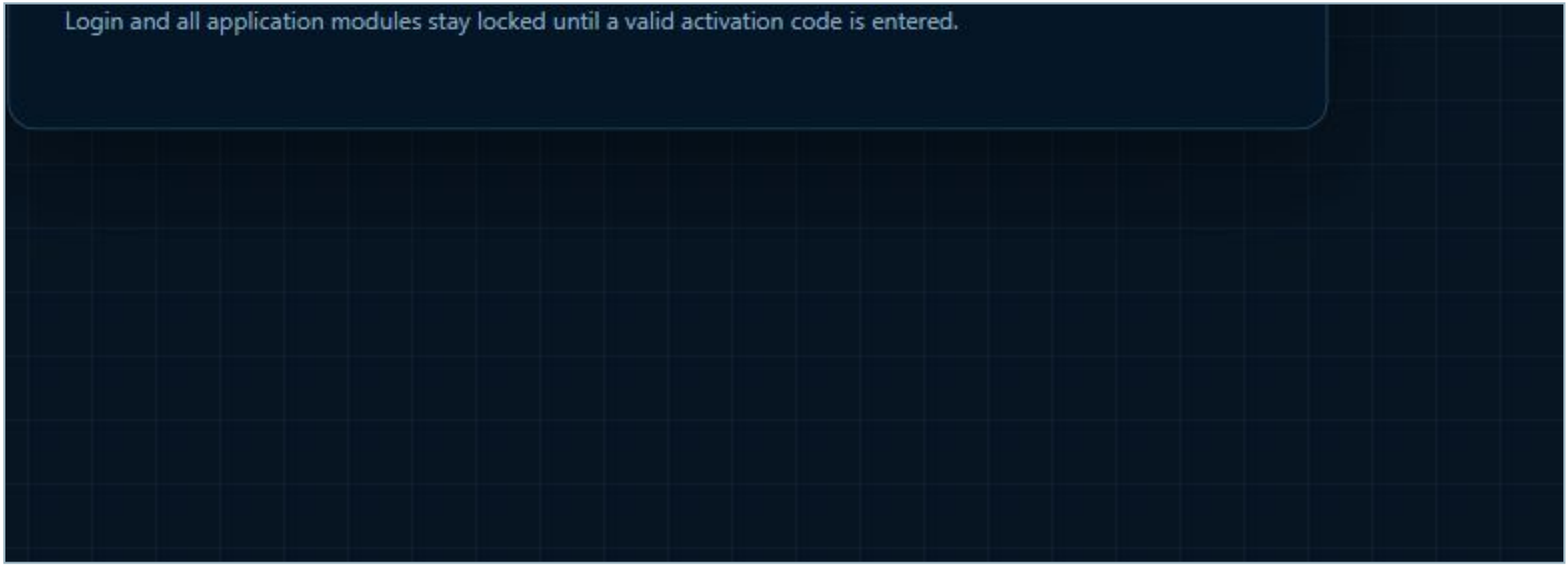
2. New Activation Code
Enter or review this value as labeled

3. ACTIVATE LICENSE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

03 License activation

Illustrated detail 03 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

COPY SYSTEM ID	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
New Activation Code	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
ACTIVATE LICENSE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

04 Login, logout and forgotten passwords

Workflow • read before using the illustrated controls

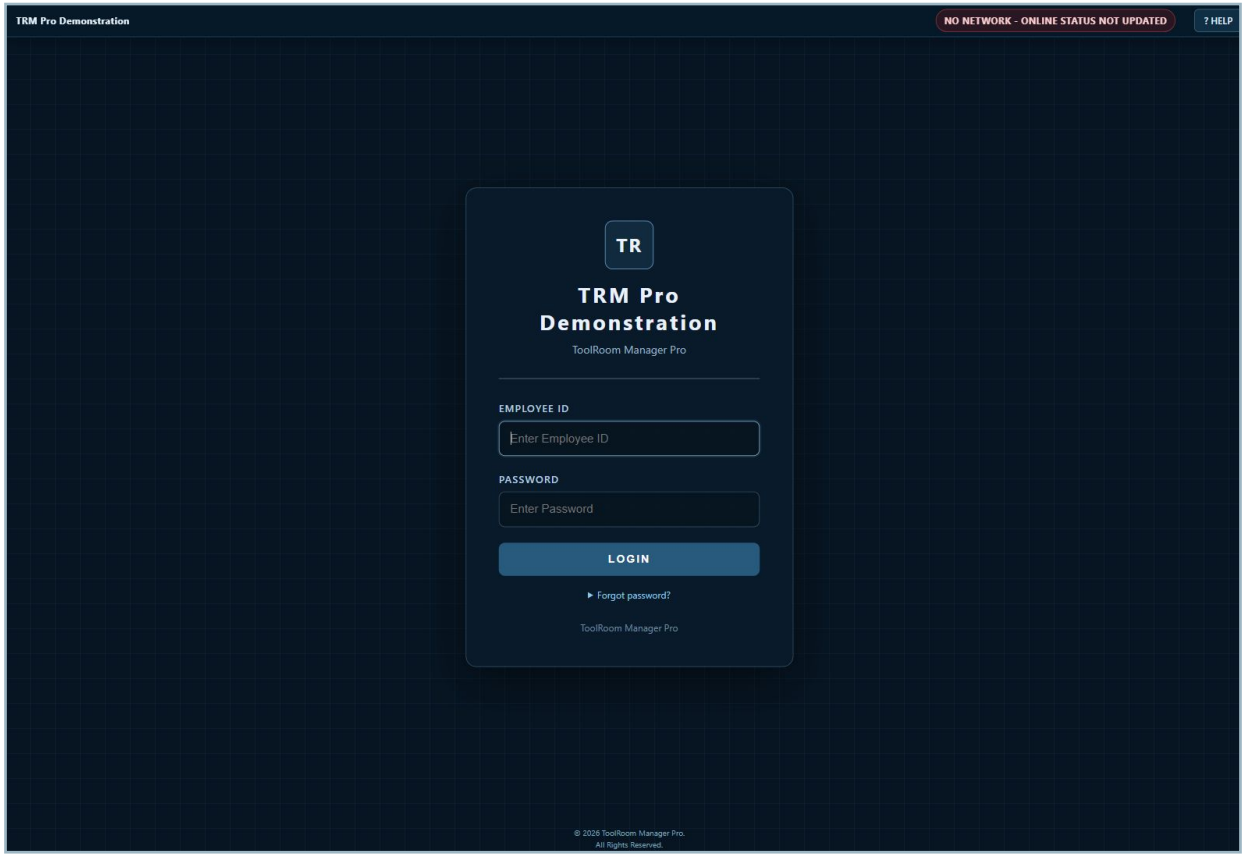
1. Enter the Employee ID/login ID created by the Admin. Enter the password and select LOGIN.
2. After work, choose Logout from the sidebar. A later normal login uses the same account credentials.
3. If the password is forgotten, open Forgot password? for guidance. Ask the Admin to reset the account through Users > Password Reset.
4. If the Admin password is forgotten, contact installation support. The current screen does not provide a configured SMS self-service reset.

Practical notes

The copyright line appears below Logout and at the bottom of the login screen. Do not share one employee account between operators; audit records identify the signed-in user.

04 Login, logout and forgotten passwords

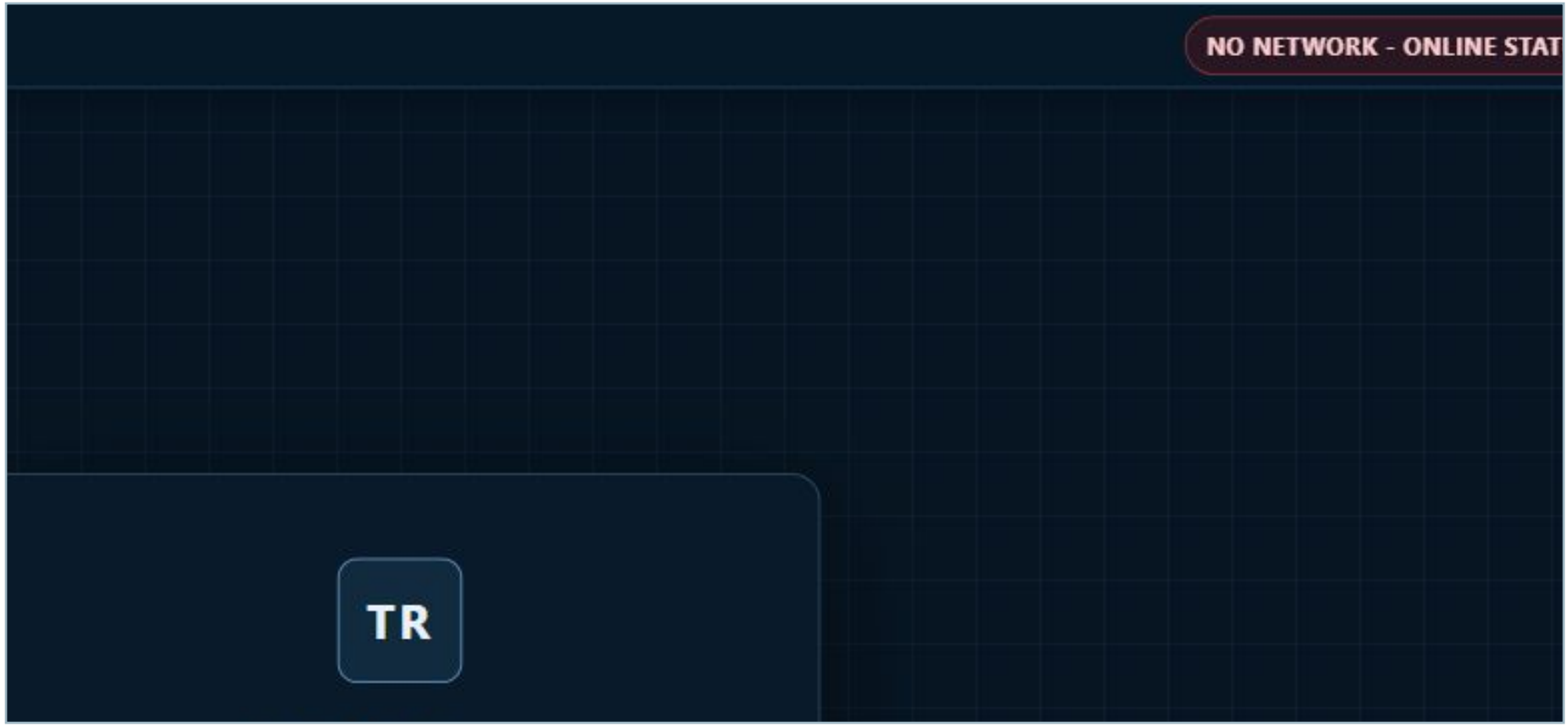
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

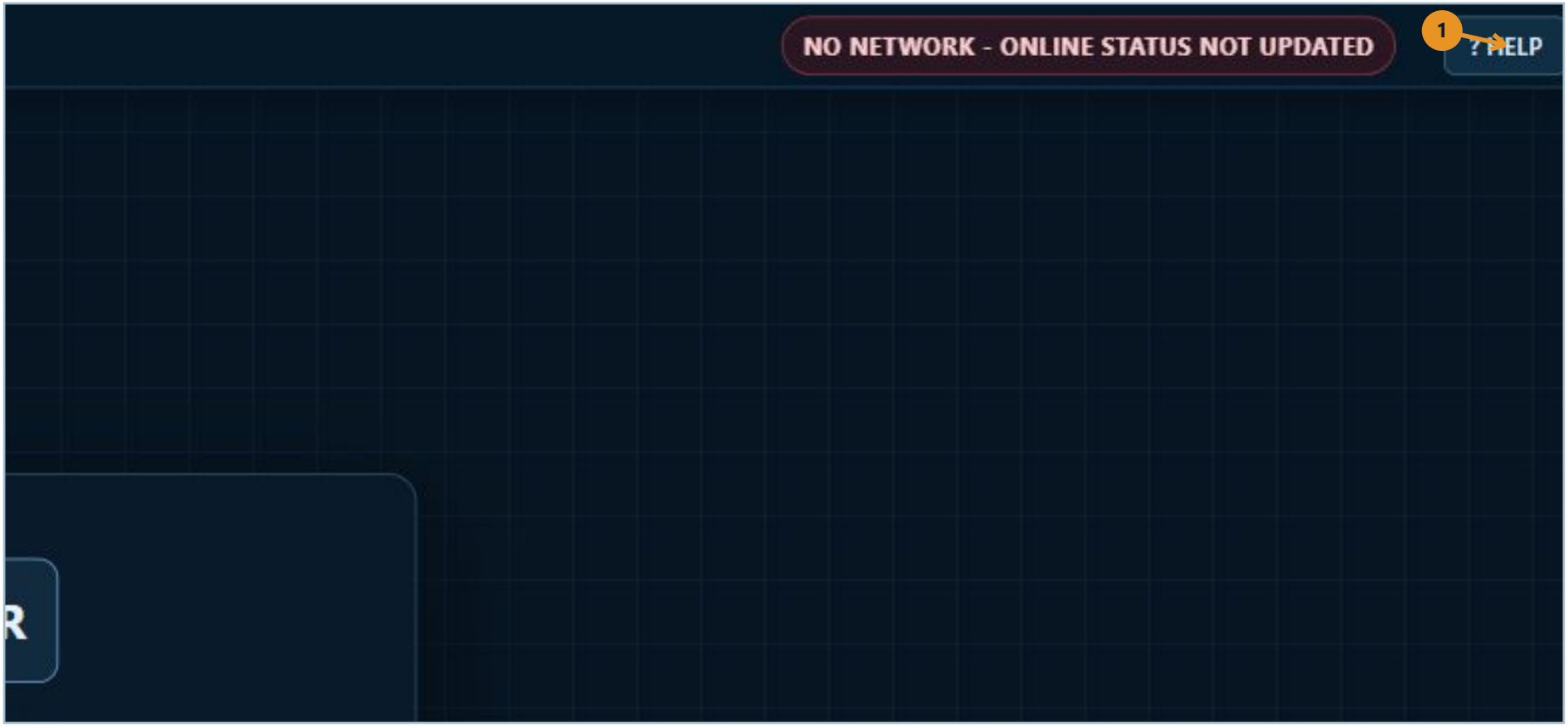
Illustrated detail 01 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

Illustrated detail 02 • orange numbers point to the named controls

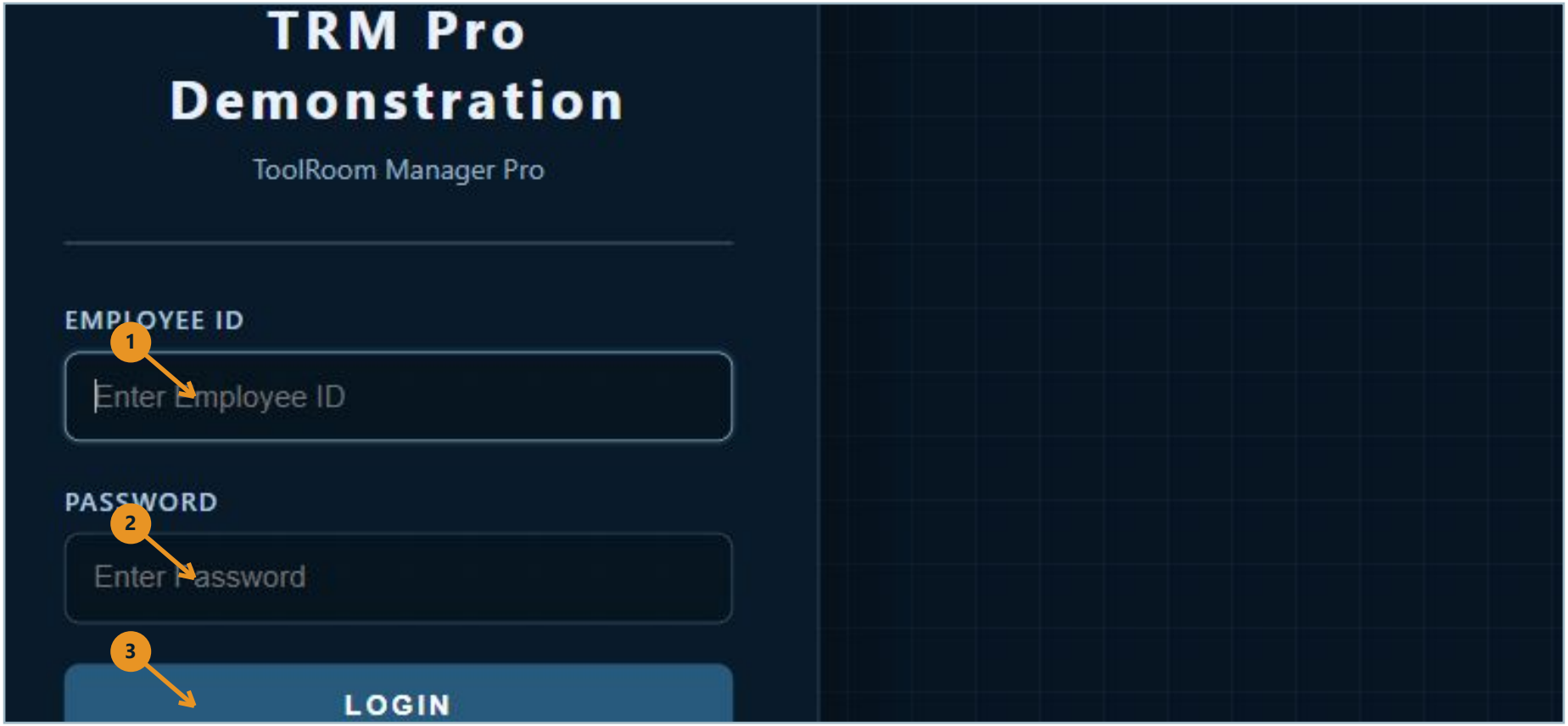


1. Help - User Manual
Open the bundled PDF manual in TRM Pro

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

Illustrated detail 03 • orange numbers point to the named controls



1. EMPLOYEE ID
Enter or review this value as labeled

2. PASSWORD
Enter the account password carefully

3. LOGIN
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

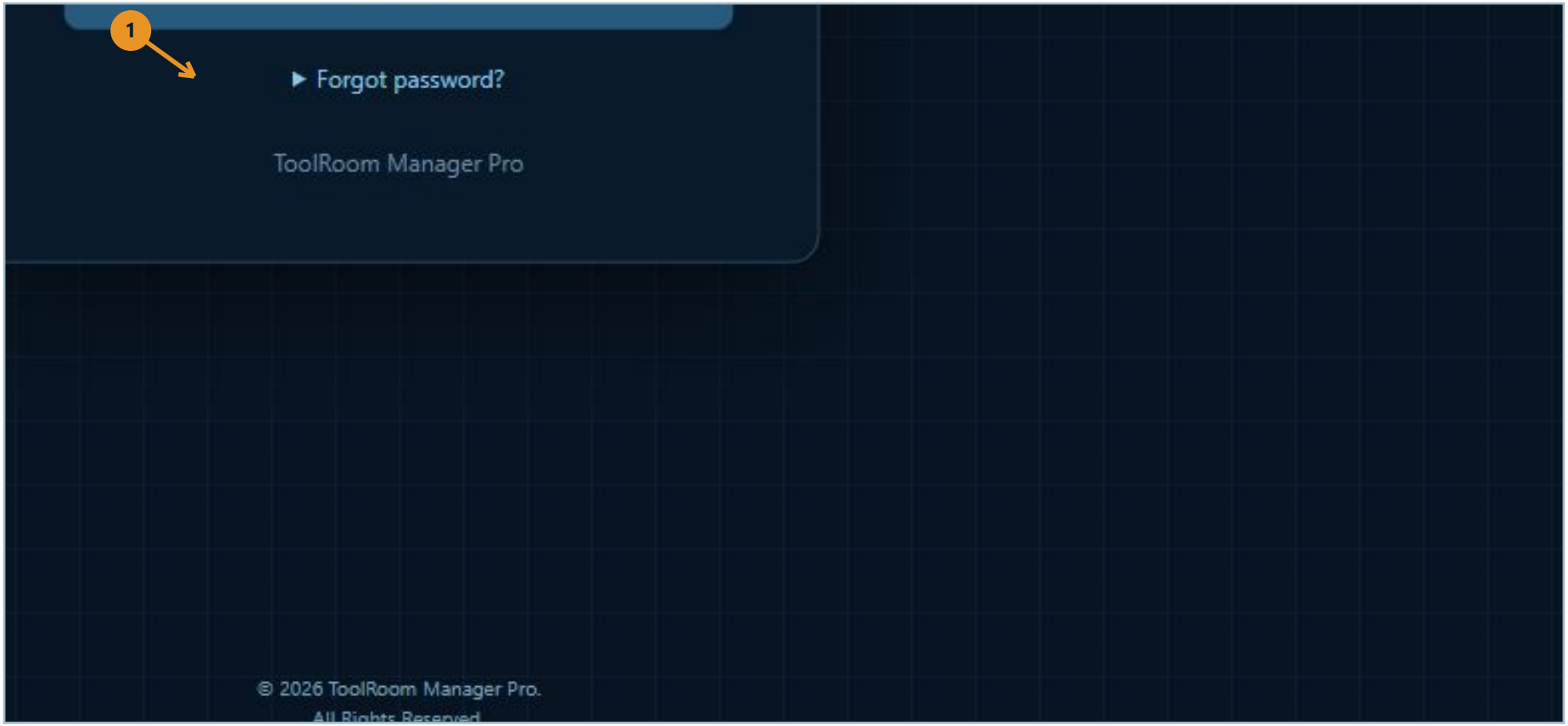
Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

Illustrated detail 05 • orange numbers point to the named controls



1. Forgot password?
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

04 Login, logout and forgotten passwords

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
EMPLOYEE ID	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
LOGIN	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Forgot password?	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

05 Forgot password guidance

Workflow • read before using the illustrated controls

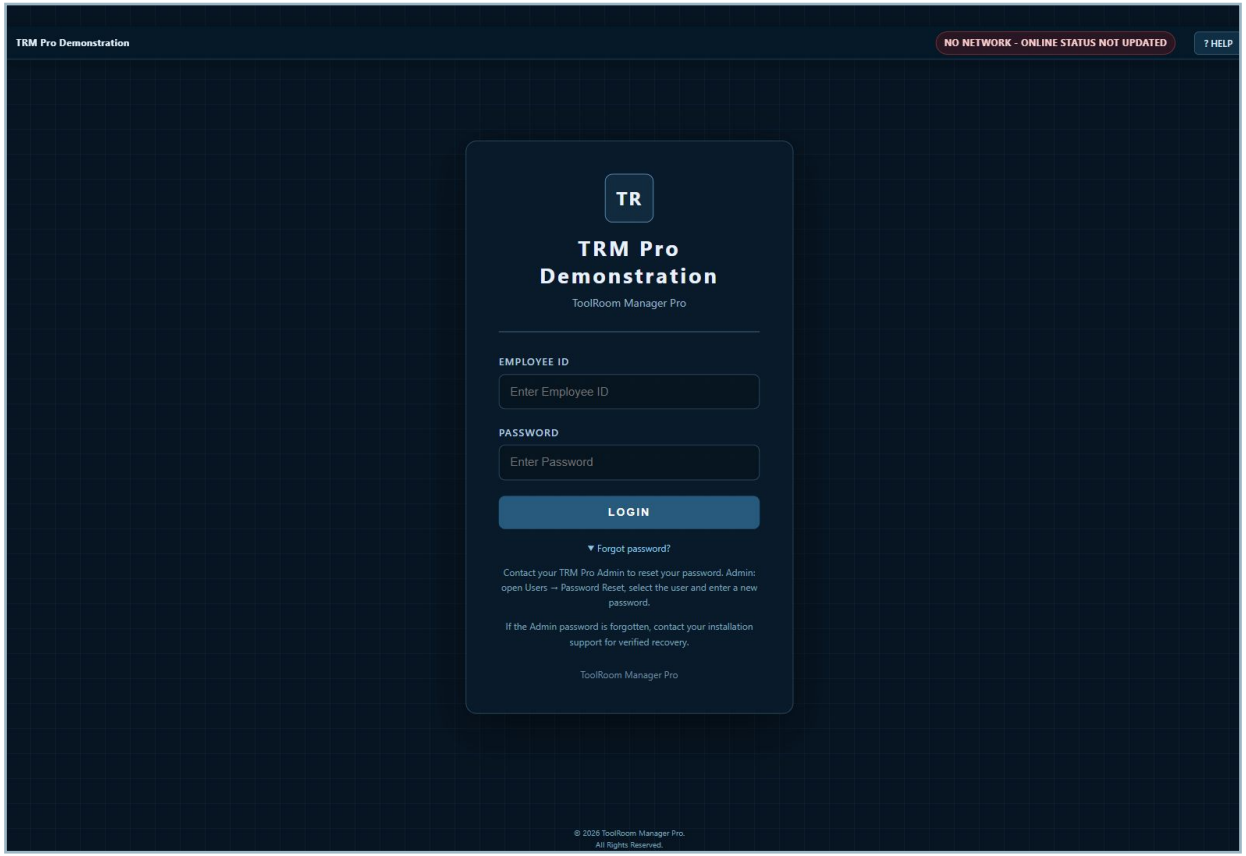
1. Expand Forgot password? on the login screen.
2. Read the guidance and contact the authorized Admin.
3. After the Admin resets the password, sign in with the newly supplied credentials.

Practical notes

Admin resets the password without changing department, group or module permissions. A password reset does not create a new license or a new employee record.

05 Forgot password guidance

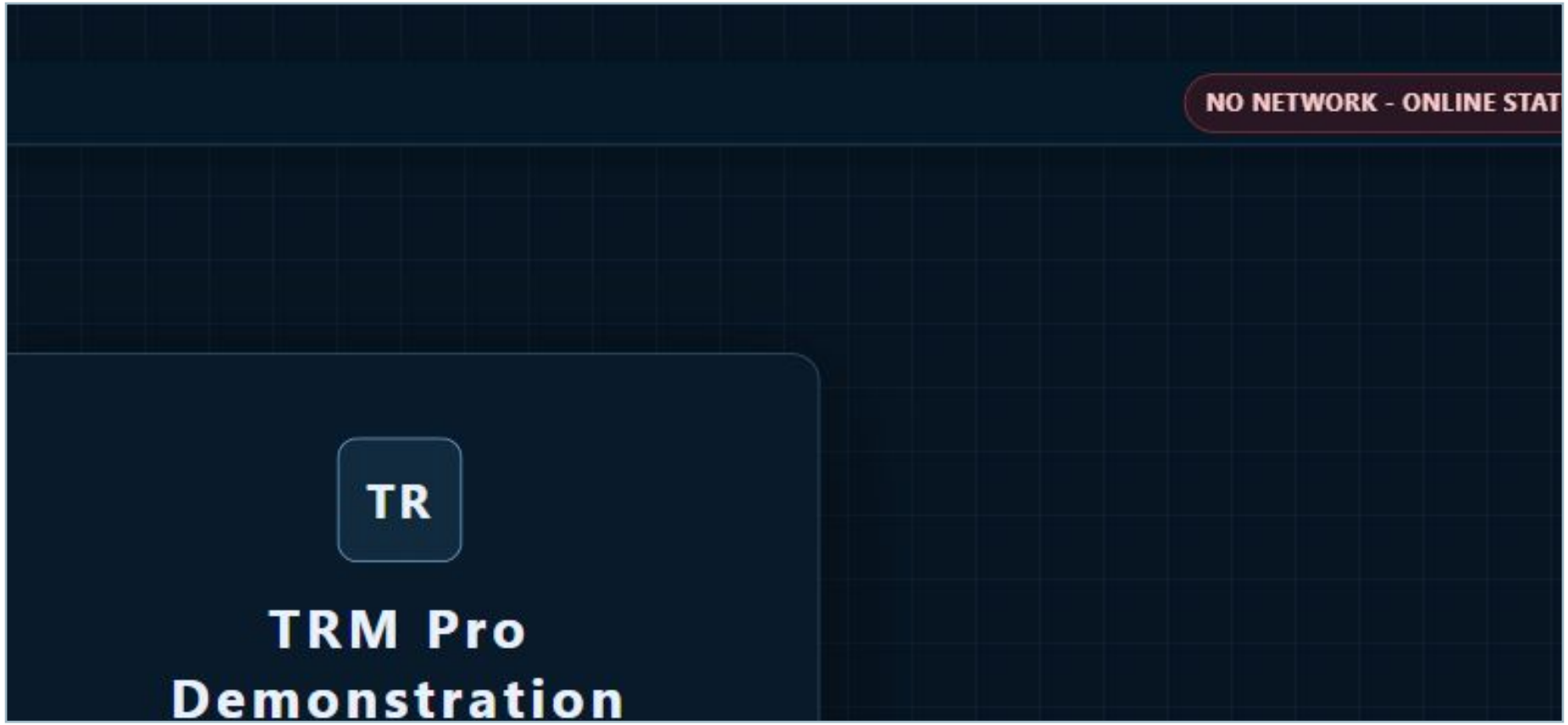
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

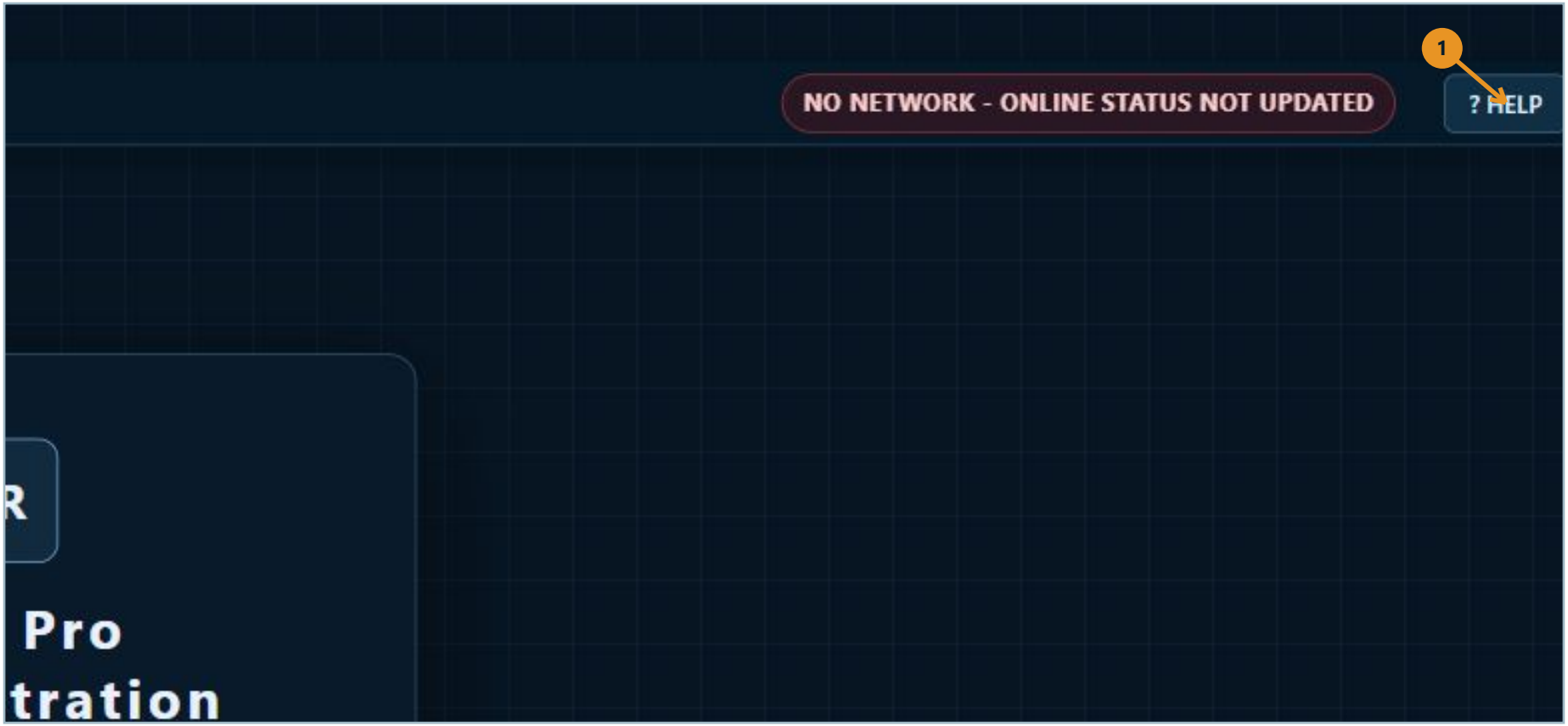
Illustrated detail 01 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

Illustrated detail 02 • orange numbers point to the named controls

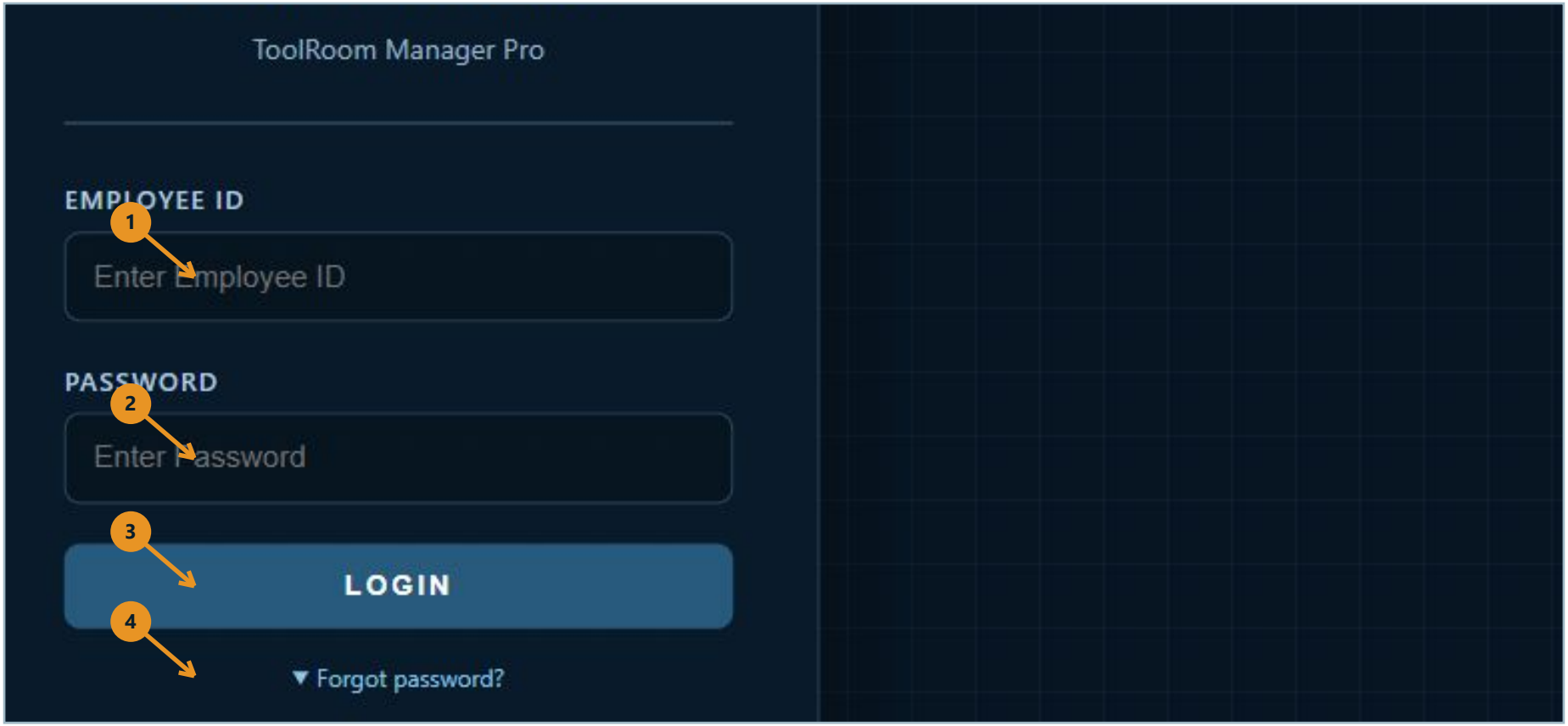


1. Help - User Manual
Open the bundled PDF manual in TRM Pro

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

Illustrated detail 03 • orange numbers point to the named controls



1. EMPLOYEE ID
Enter or review this value as labeled

2. PASSWORD
Enter the account password carefully

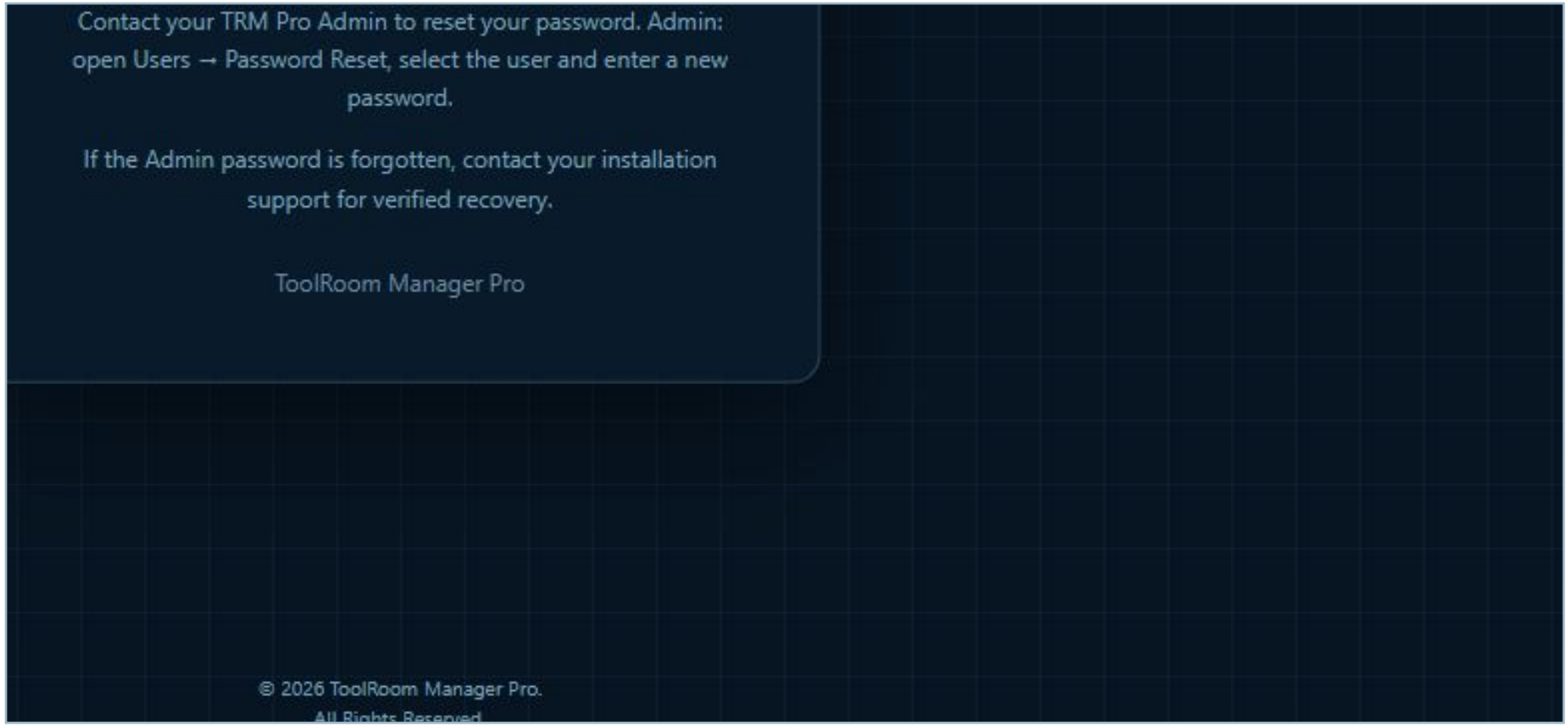
3. LOGIN
Use this named action/tab for the workflow described in this chapter

4. Forgot password?
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

05 Forgot password guidance

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
EMPLOYEE ID	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
LOGIN	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Forgot password?	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

06 Dashboard

Workflow • read before using the illustrated controls

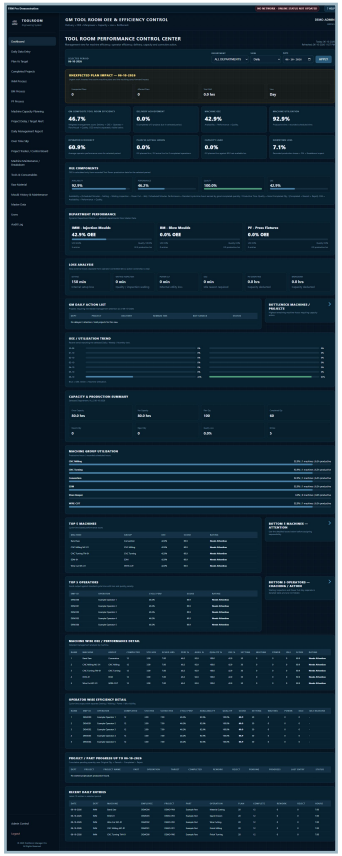
1. Select the available date/period and department filters, then refresh the dashboard.
2. Read summary cards together with the detailed tables. A total is only meaningful for the selected report scope.
3. Use the top-right arrow on Bottleneck Machines / Projects, Bottom 5 Machines and Bottom 5 Operators to expand or minimize that section.
4. Review remaining hours, machine load, operator performance and loss reasons before deciding what action is needed.

Practical notes

Collapsible sections start minimized where configured. Only the section body is hidden; report rows remain ordinary table rows. An empty report may simply mean there are no daily records in the selected period. A score alone does not explain a loss reason.

06 Dashboard

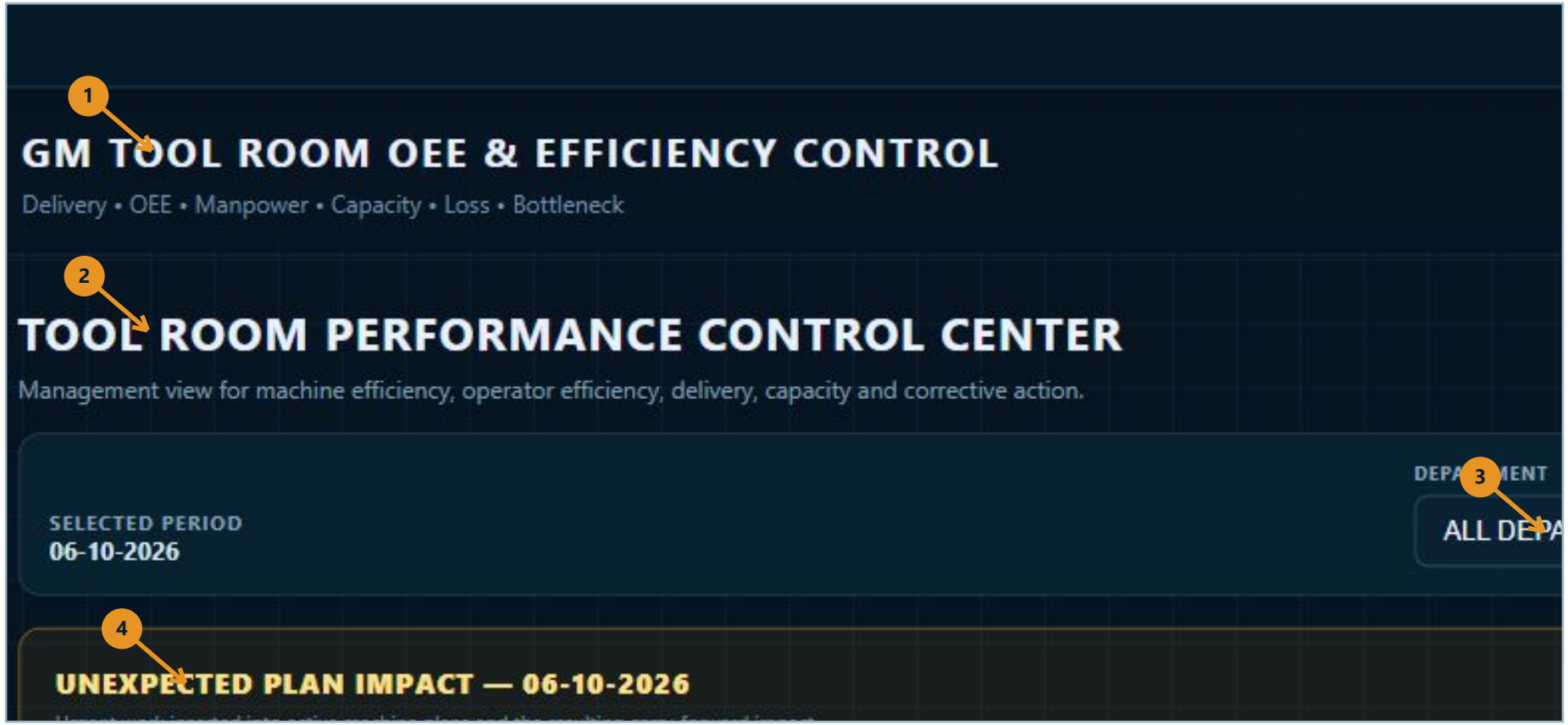
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 01 • orange numbers point to the named controls



1. GM TOOL ROOM OEE & EFFICIENCY CONTROL
Enter or review this value as labeled

2. TOOL ROOM PERFORMANCE CONTROL CENTER
Read this section heading before using the controls below it.

3. Department
Choose the required value

4. UNEXPECTED PLAN IMPACT — 06-10-2026
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. Department
Choose the required value

3. Period
Choose the required value

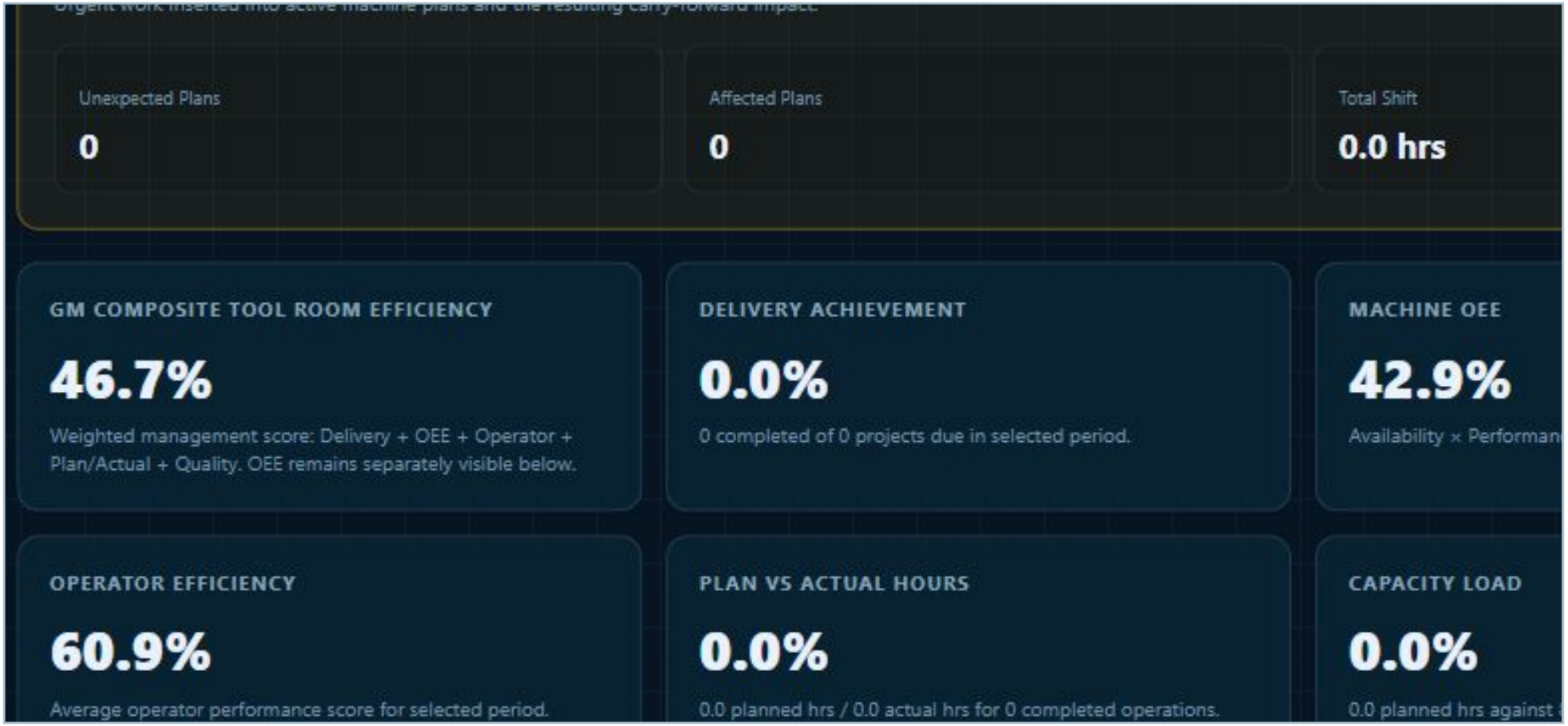
4. DATE
Select the actual reference date/time for this record or report

5. APPLY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

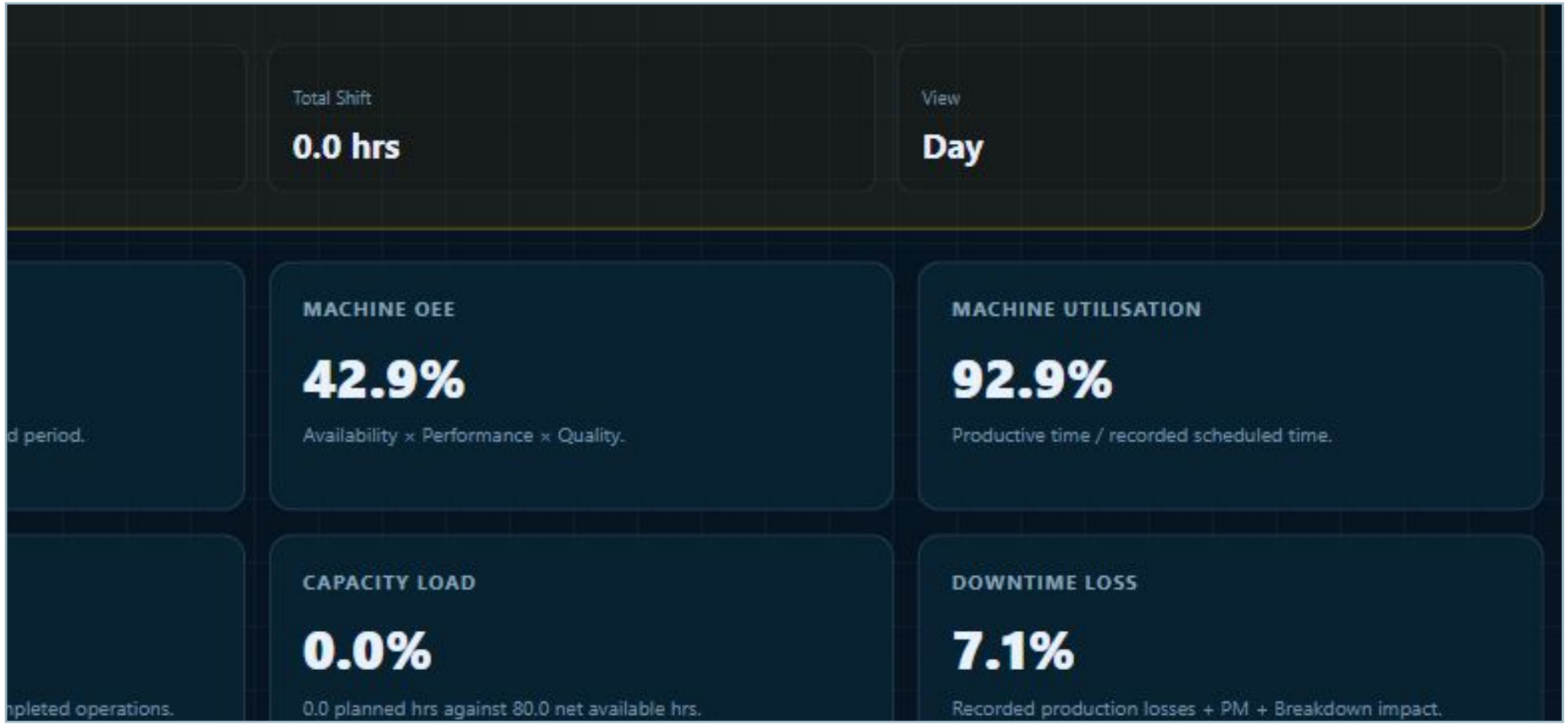
Illustrated detail 03 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

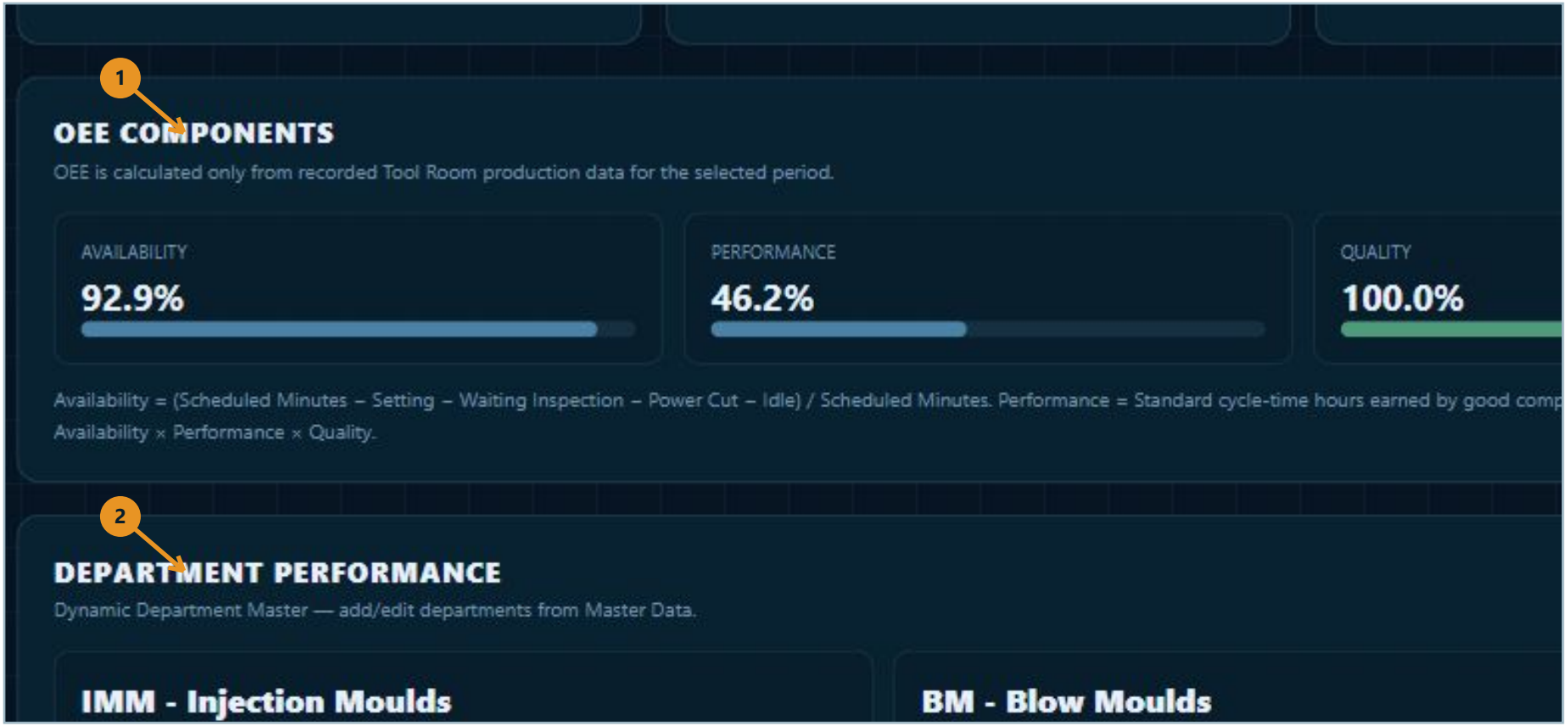
Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 05 • orange numbers point to the named controls



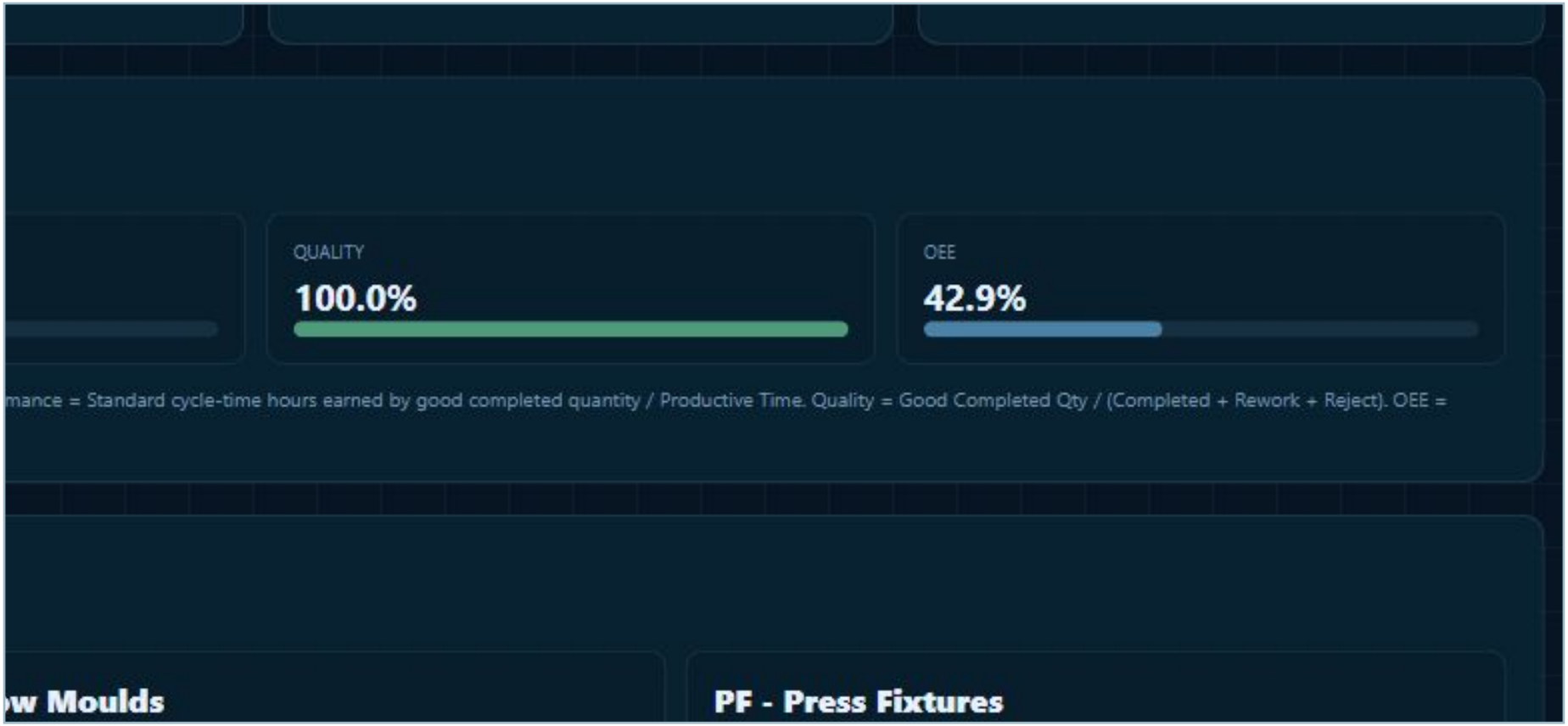
1. OEE COMPONENTS
Enter or review this value as labeled

2. DEPARTMENT PERFORMANCE
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

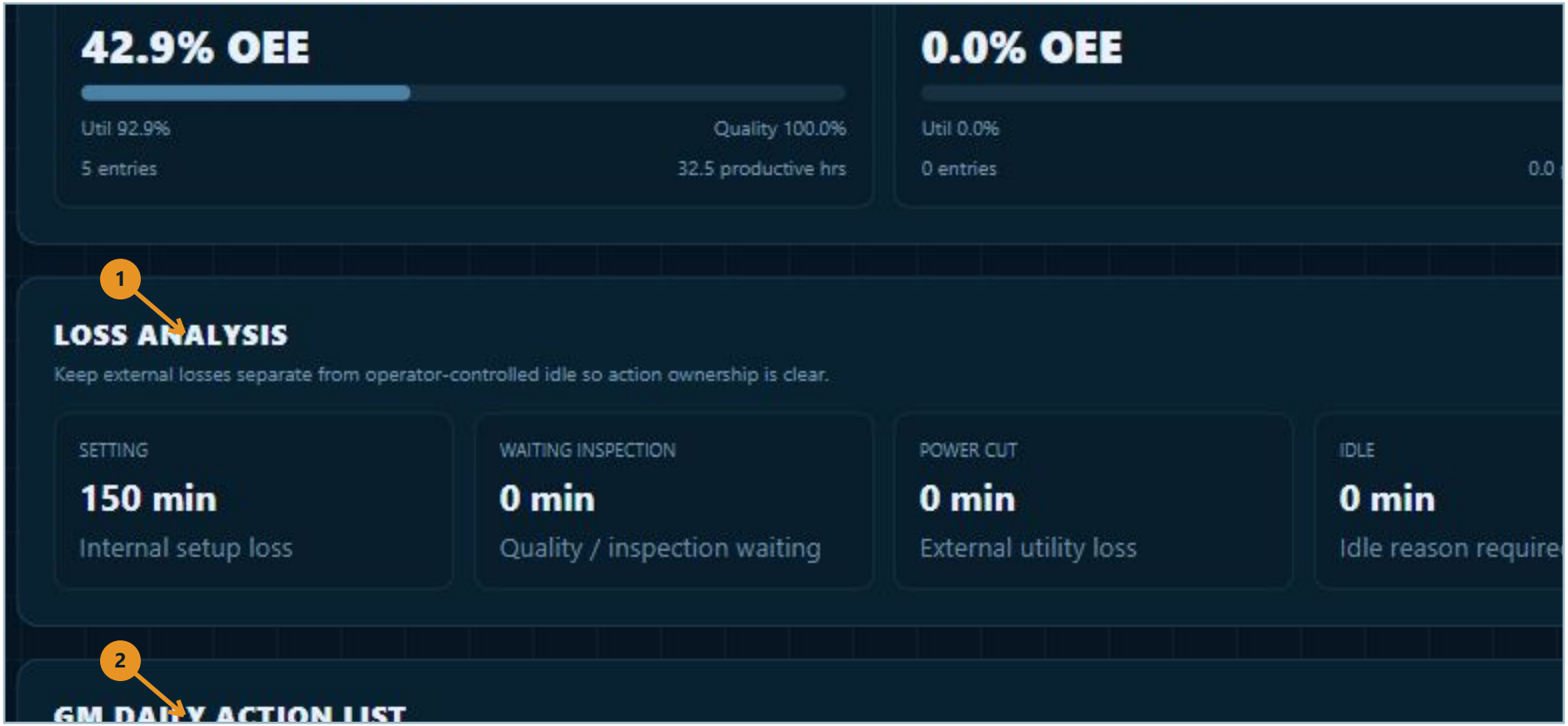
Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 07 • orange numbers point to the named controls



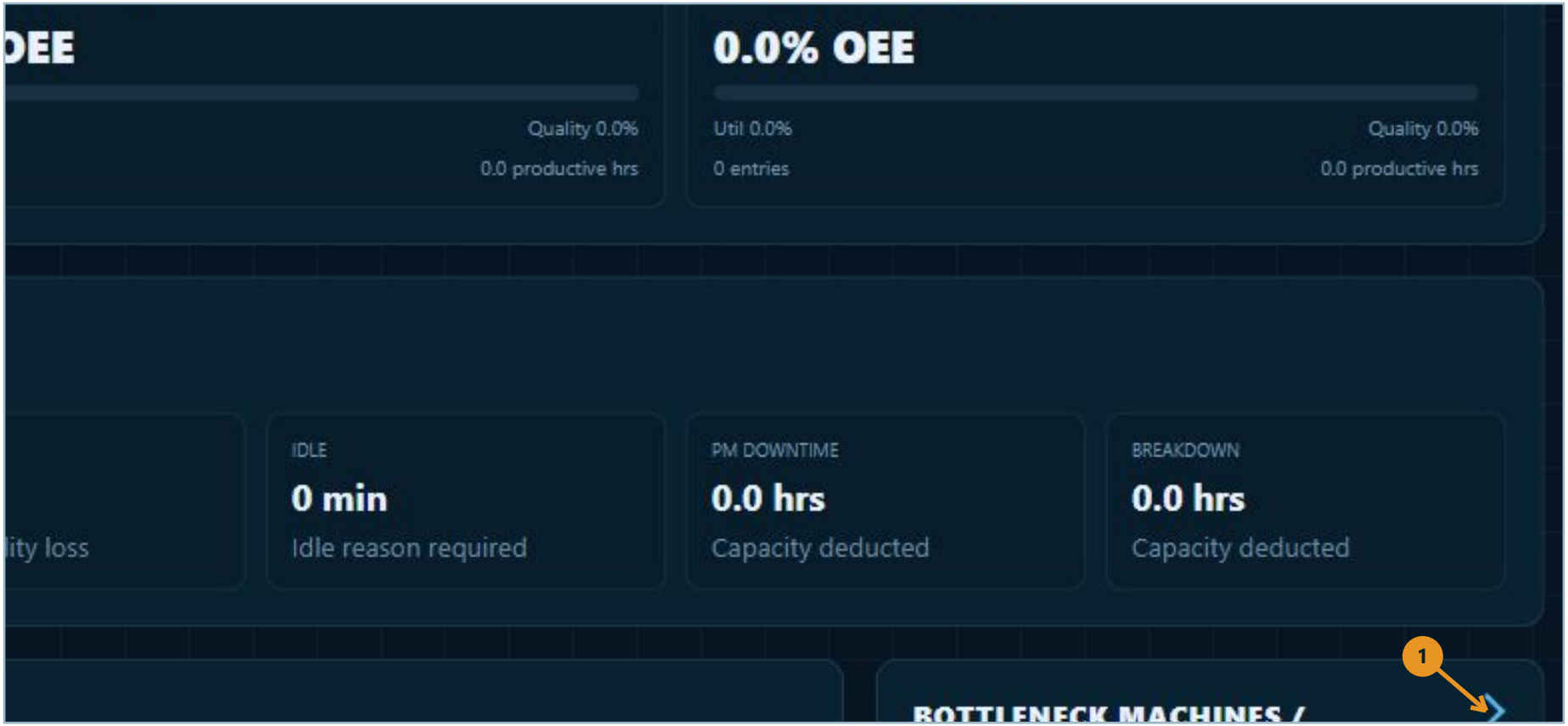
1. LOSS ANALYSIS
Enter or review this value as labeled

2. GM DAILY ACTION LIST
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 08 • orange numbers point to the named controls

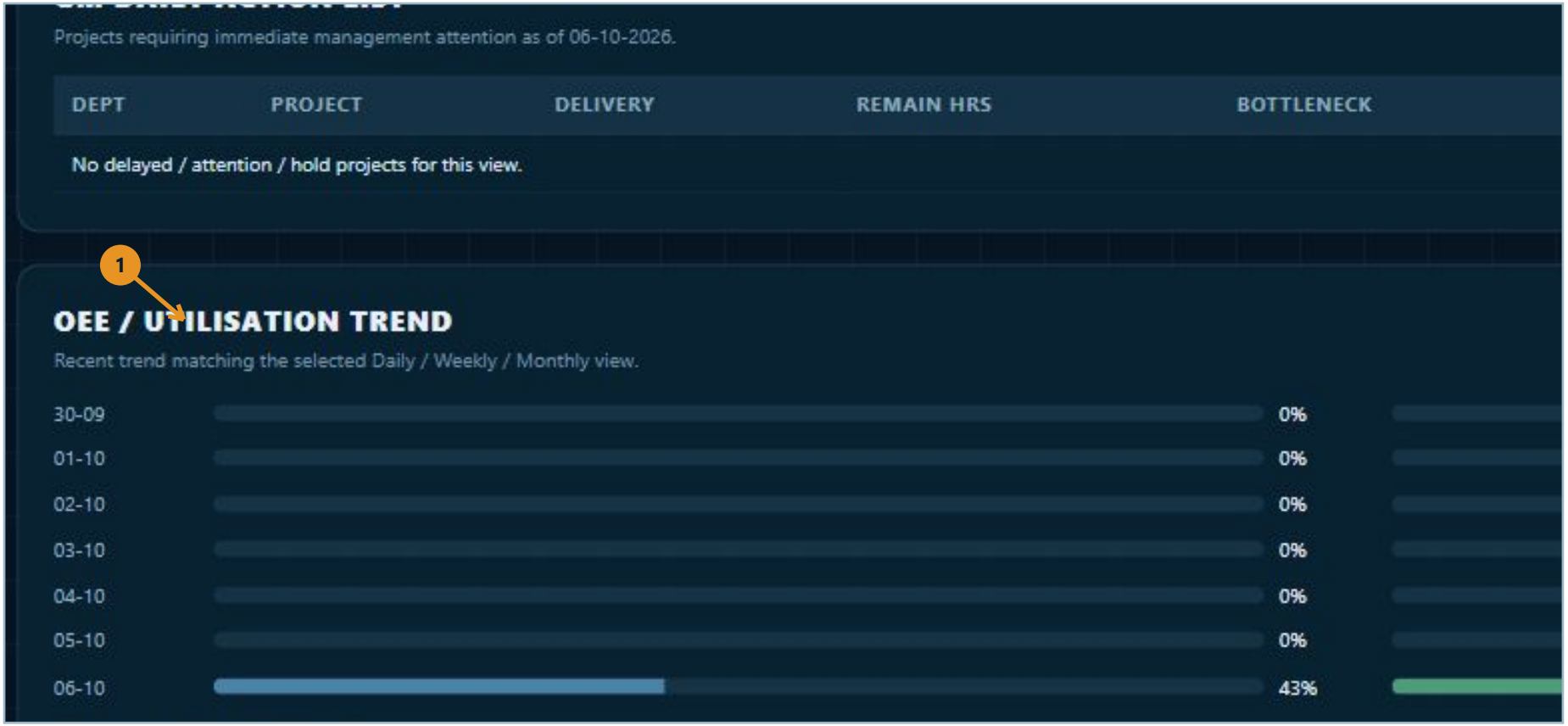


1. Open section
Use this section's corner arrow to expand or minimize its details

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 09 • orange numbers point to the named controls

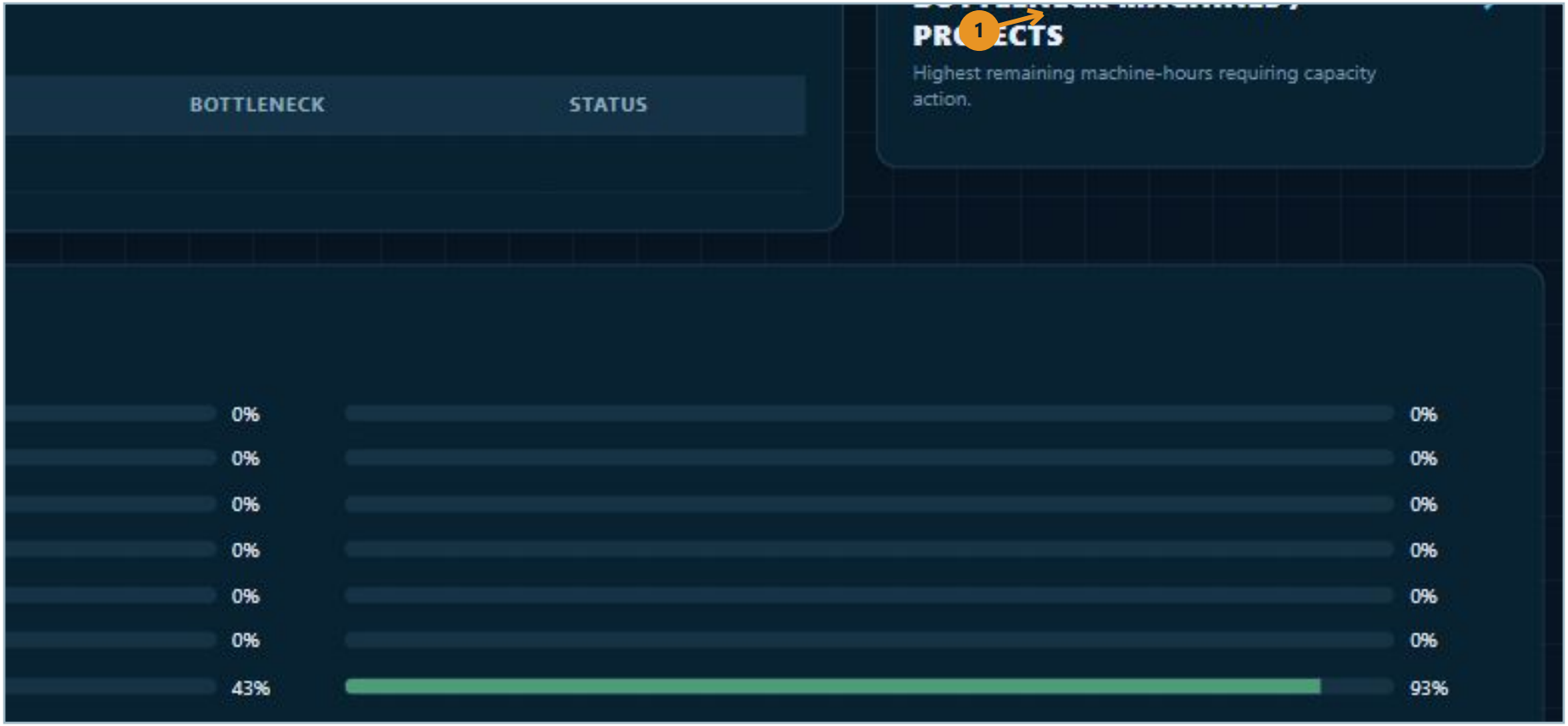


1. OEE / UTILISATION TREND
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 10 • orange numbers point to the named controls



1. BOTTLENECK MACHINES / PROJECTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 11 • orange numbers point to the named controls



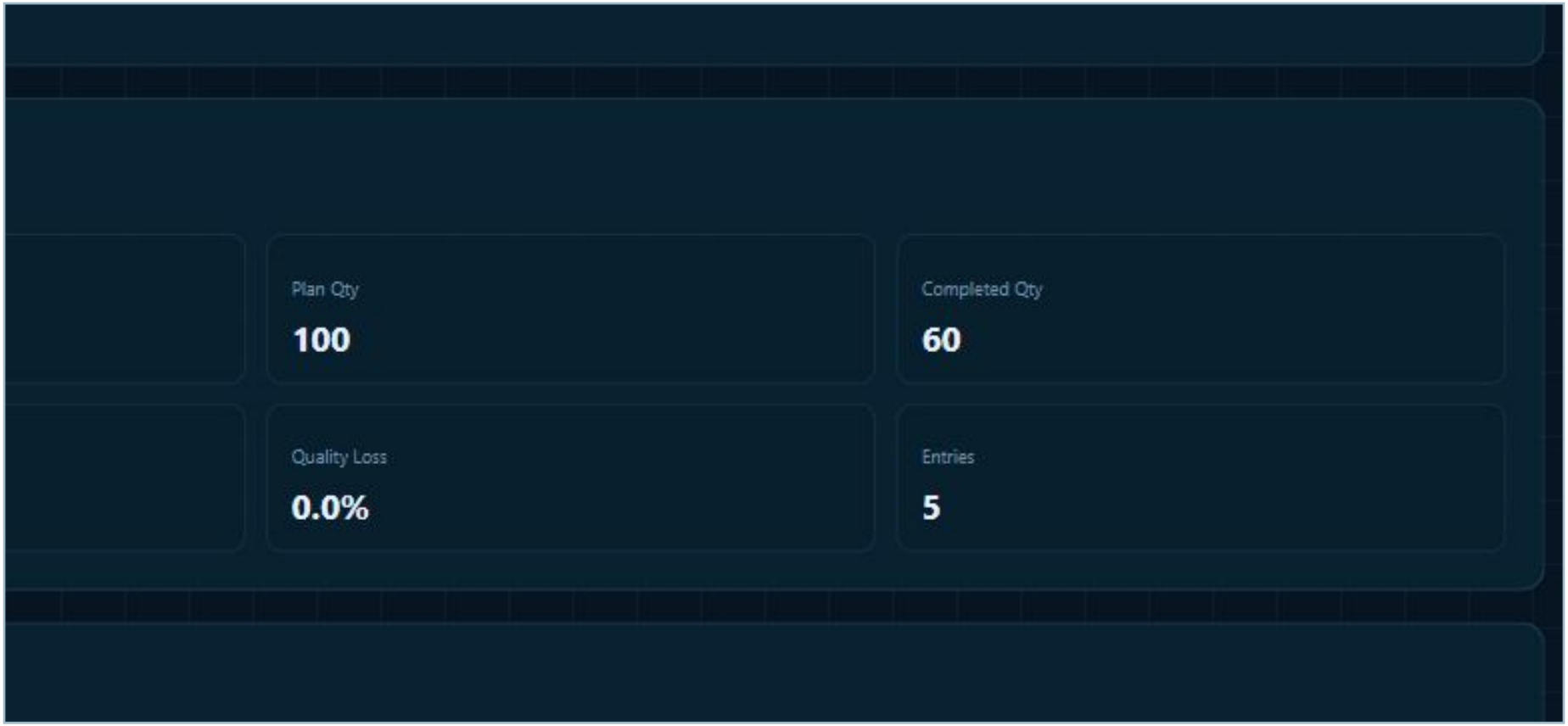
1. CAPACITY & PRODUCTION SUMMARY
Enter or review this value as labeled

2. MACHINE GROUP UTILISATION
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 12 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 13 • orange numbers point to the named controls



1. TOP 5 MACHINES
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 14 • orange numbers point to the named controls



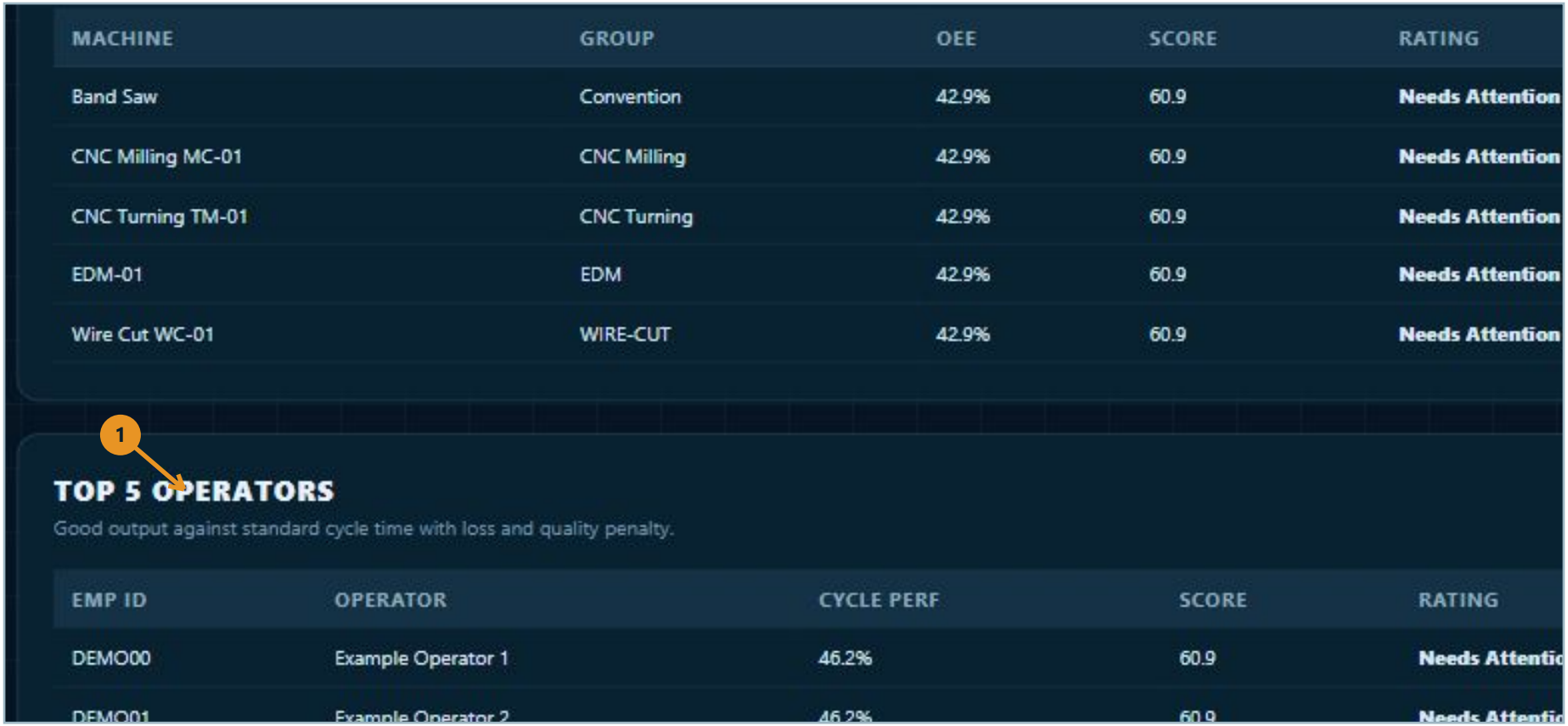
1. BOTTOM 5 MACHINES — ATTENTION
Enter or review this value as labeled

2. Open section
Use this section's corner arrow to expand or minimize its details

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 15 • orange numbers point to the named controls

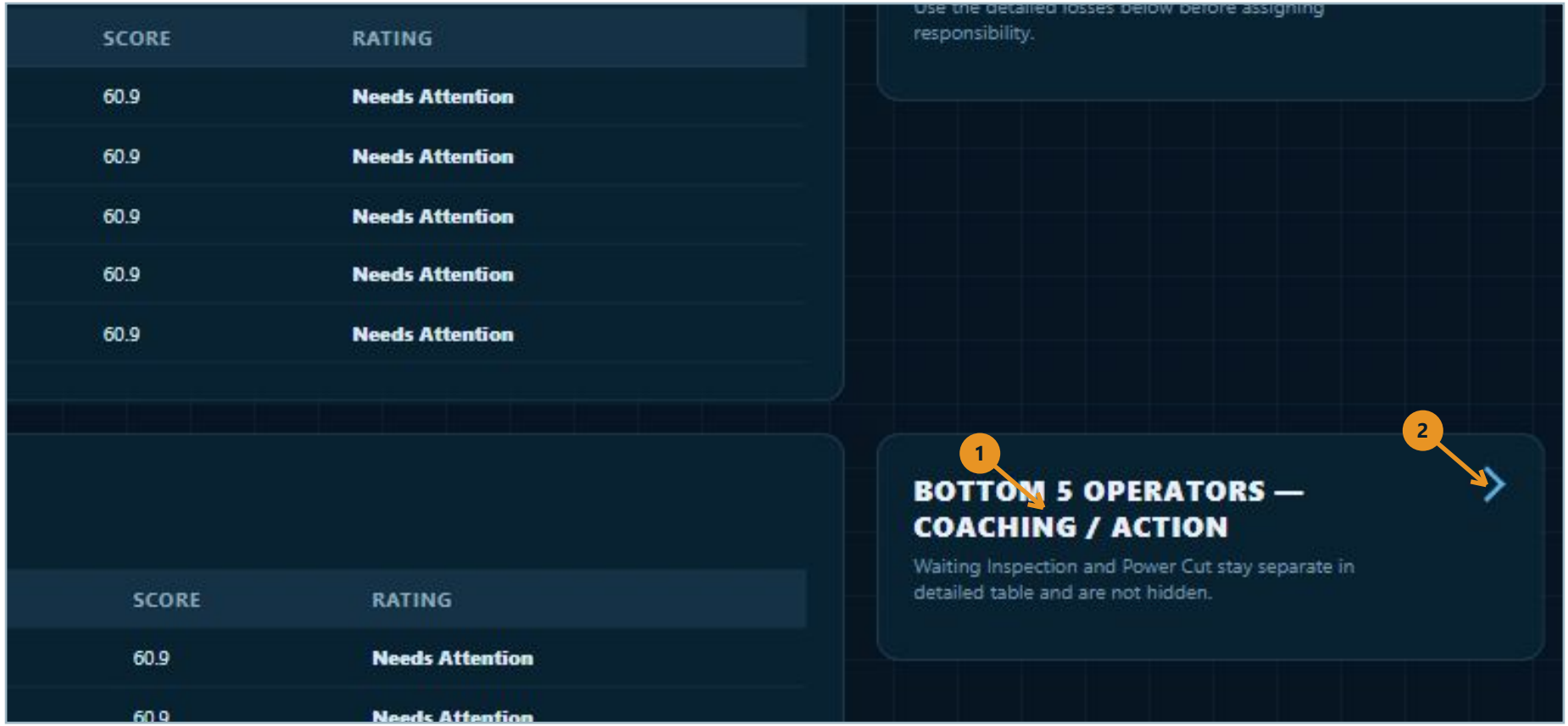


1. TOP 5 OPERATORS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 16 • orange numbers point to the named controls



1. BOTTOM 5 OPERATORS — COACHING / ACTION
Enter or review this value as labeled

2. Open section
Use this section's corner arrow to expand or minimize its details

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 17 • orange numbers point to the named controls



1. MACHINE WISE OEE / PERFORMANCE DETAIL
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

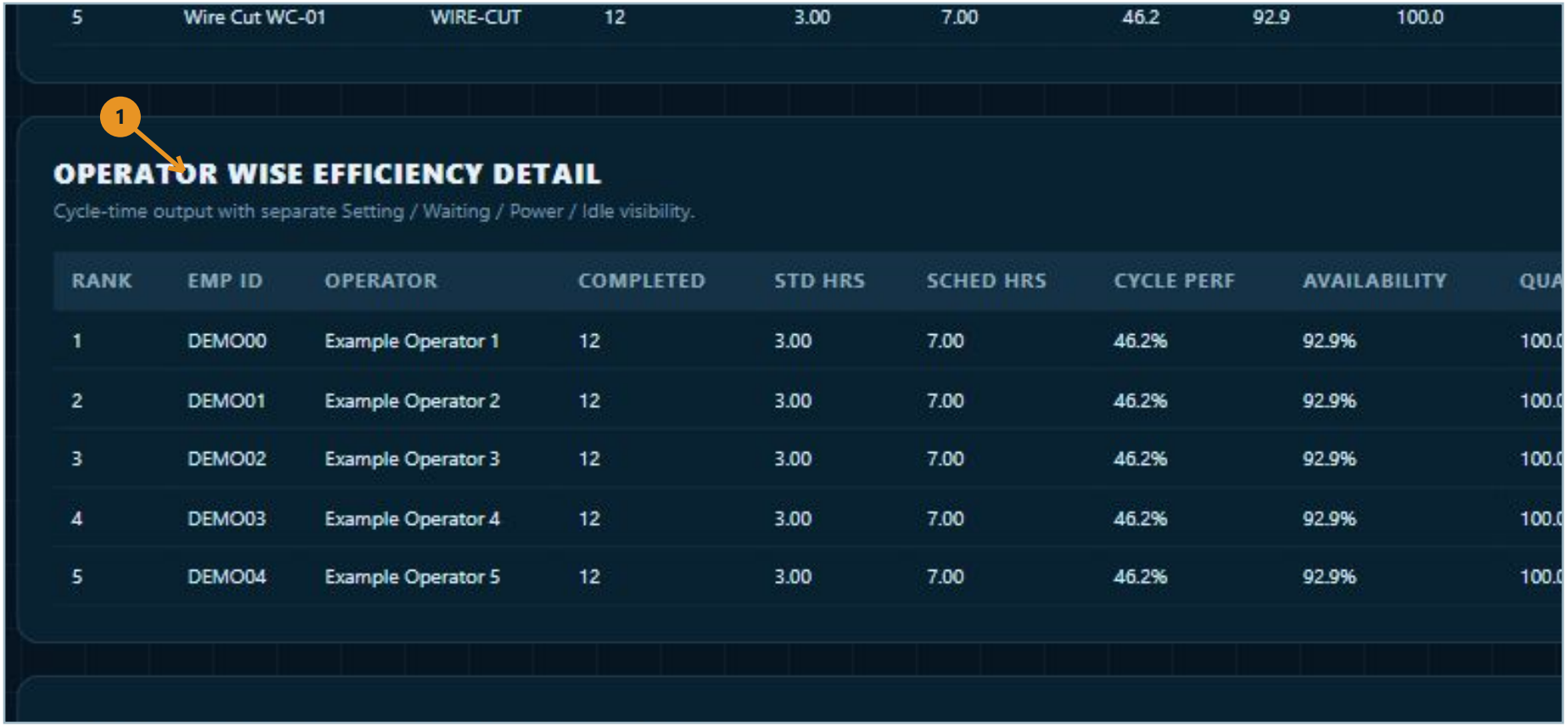
Illustrated detail 18 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 19 • orange numbers point to the named controls



1. OPERATOR WISE EFFICIENCY DETAIL
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

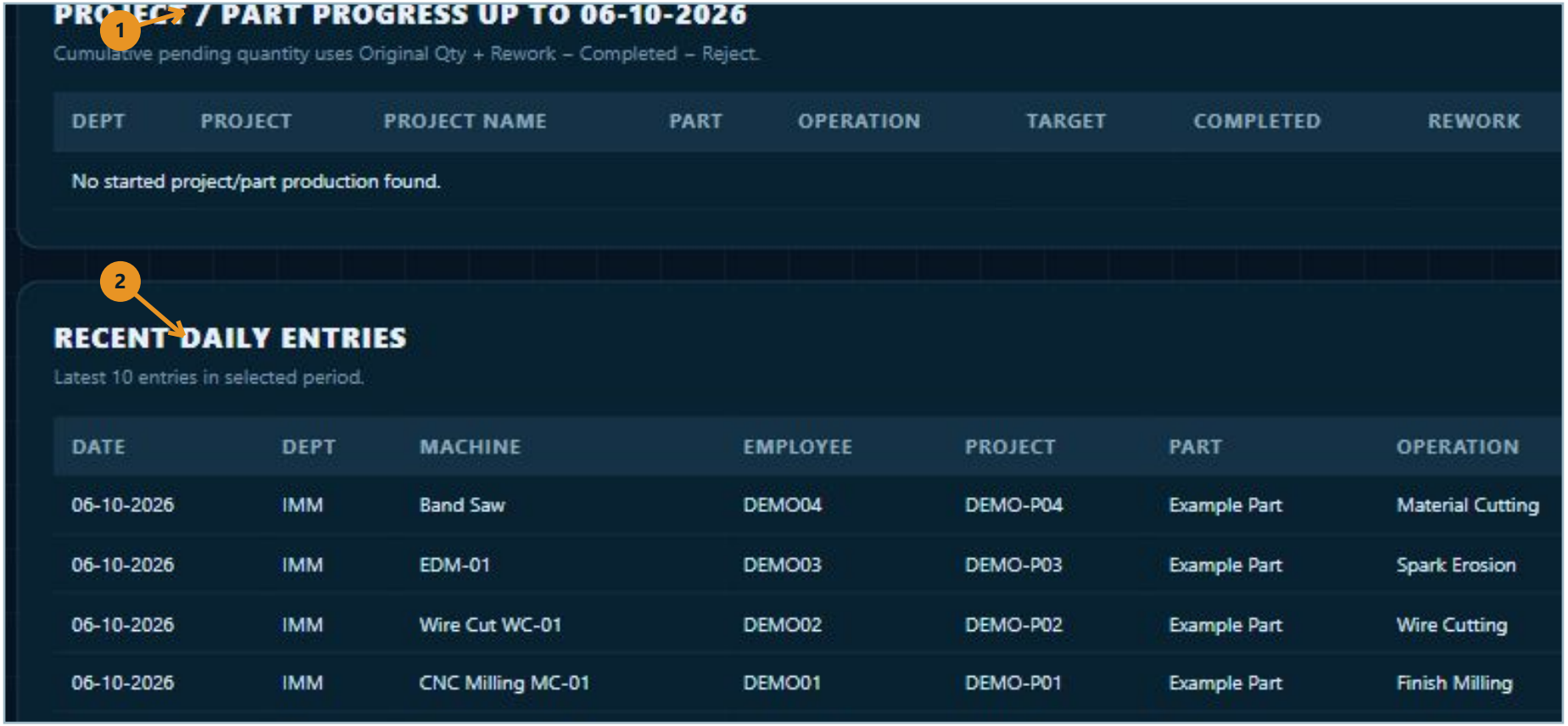
Illustrated detail 20 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 21 • orange numbers point to the named controls



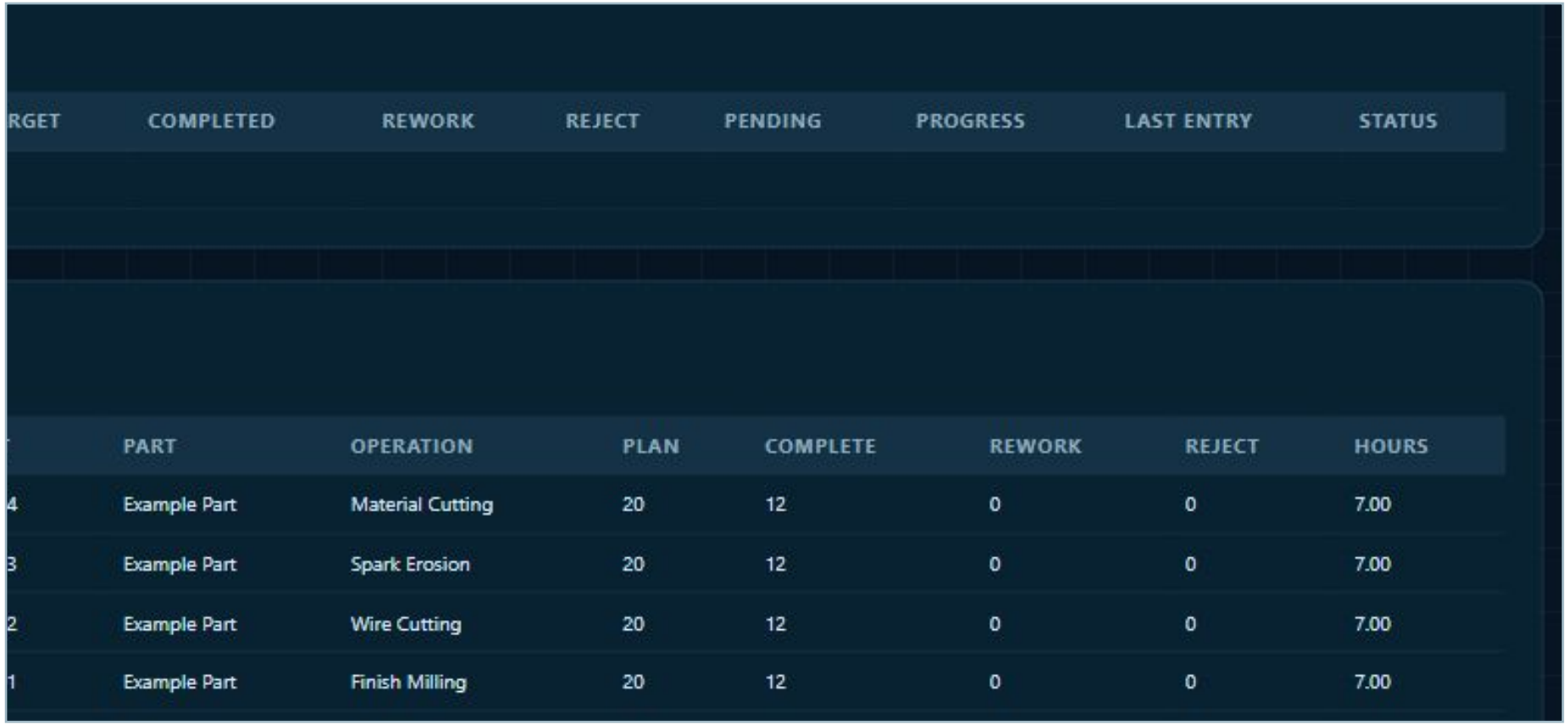
1. PROJECT / PART PROGRESS UP TO 06-10-2026
Enter or review this value as labeled

2. RECENT DAILY ENTRIES
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

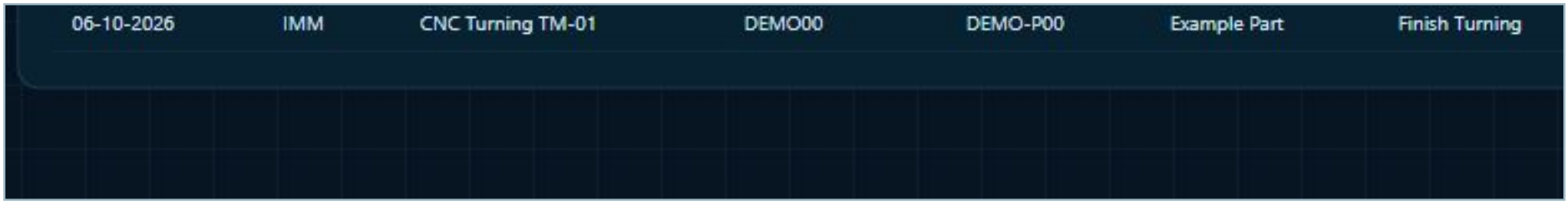
Illustrated detail 22 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

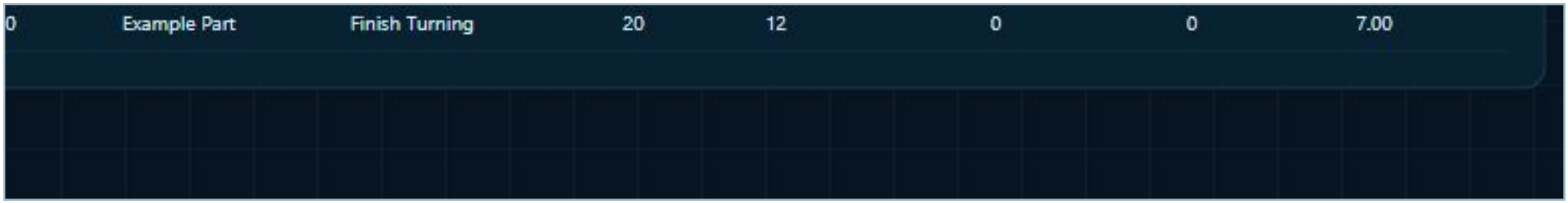
Illustrated detail 23 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

06 Dashboard

Illustrated detail 24 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
GM TOOL ROOM OEE & EFFICIENCY CONTROL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL DEPARTMENTS; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Period	Choose the required value. Available choices: Daily; Weekly; Monthly. The displayed records follow this screen's scope and account access.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
APPLY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
UNEXPECTED PLAN IMPACT — 06-10-2026	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
OEE COMPONENTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DEPARTMENT PERFORMANCE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
LOSS ANALYSIS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
GM DAILY ACTION LIST	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTLENECK MACHINES / PROJECTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Open section	Use this section's corner arrow to expand or minimize its details. It affects the section body, not individual data rows.
OEE / UTILISATION TREND	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
CAPACITY & PRODUCTION SUMMARY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

MACHINE GROUP UTILISATION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
TOP 5 MACHINES	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTOM 5 MACHINES — ATTENTION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
TOP 5 OPERATORS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTOM 5 OPERATORS — COACHING / ACTION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
MACHINE WISE OEE / PERFORMANCE DETAIL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
OPERATOR WISE EFFICIENCY DETAIL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PROJECT / PART PROGRESS UP TO 06-10-2026	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
RECENT DAILY ENTRIES	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

07 Master Data: plants, company logo and data connection

Workflow • read before using the illustrated controls

1. Use 1 · PLANT NAMES to add a unique Plant Code, Plant Name, location and GST details. Keep Active checked for a usable plant.
2. Under DATA SAVE & ONLINE AUTO UPDATE choose the location type and enter the actual accessible folder path. Select VERIFY & SAVE LOCATION and confirm the connected status.
3. For other LAN PCs use the same common UNC folder. Test access in Windows File Explorer under the normal Windows user account.
4. Choose the company logo file and use UPLOAD LOGO. Supported PNG, JPG, WEBP or GIF uploads are limited to 3 MB.
5. Use EDIT beside an existing plant to correct it. Keep identifiers consistent with related departments and projects.

Worked example

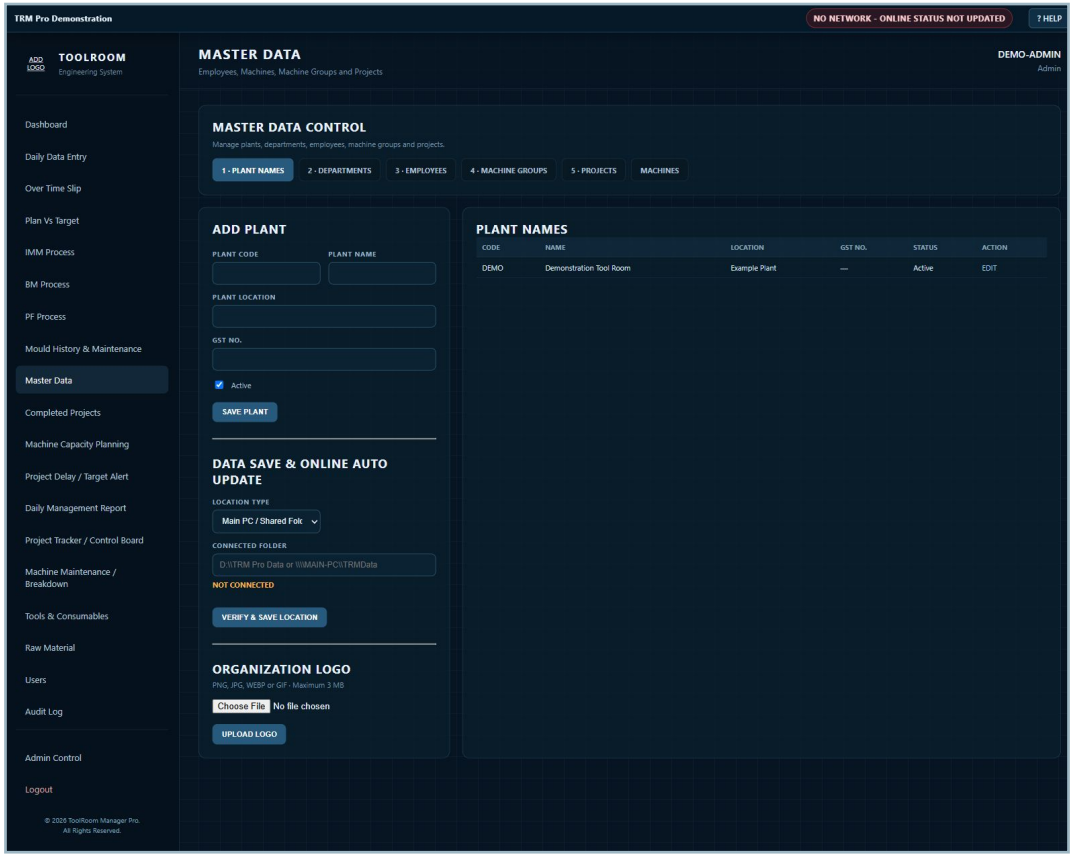
Admin folder: C:\TRMProData. Another PC connects through \\OFFICE-PC\TRMProData. Both must refer to the same shared records.

Practical notes

A folder verification confirms accessibility at that moment. The Windows shared-folder desktop edition requires access to the common data folder while working. A OneDrive/Google Drive URL is not a Windows folder path. Do not run several PCs against independently synchronized copies of a live database; use the LAN shared folder for concurrent work. The network-status banner and last-update information do not guarantee offline conflict-safe database synchronization.

07 Master Data: plants, company logo and data connection

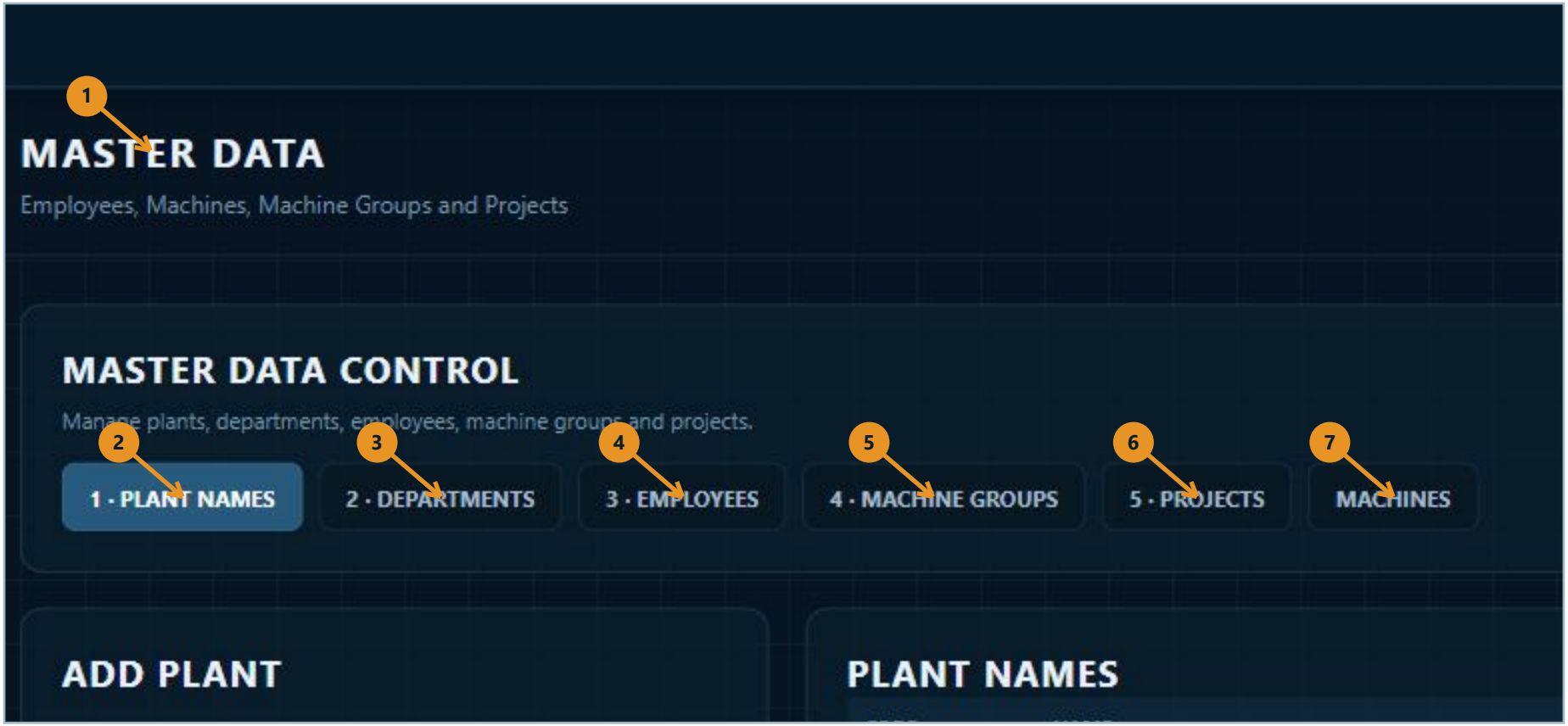
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

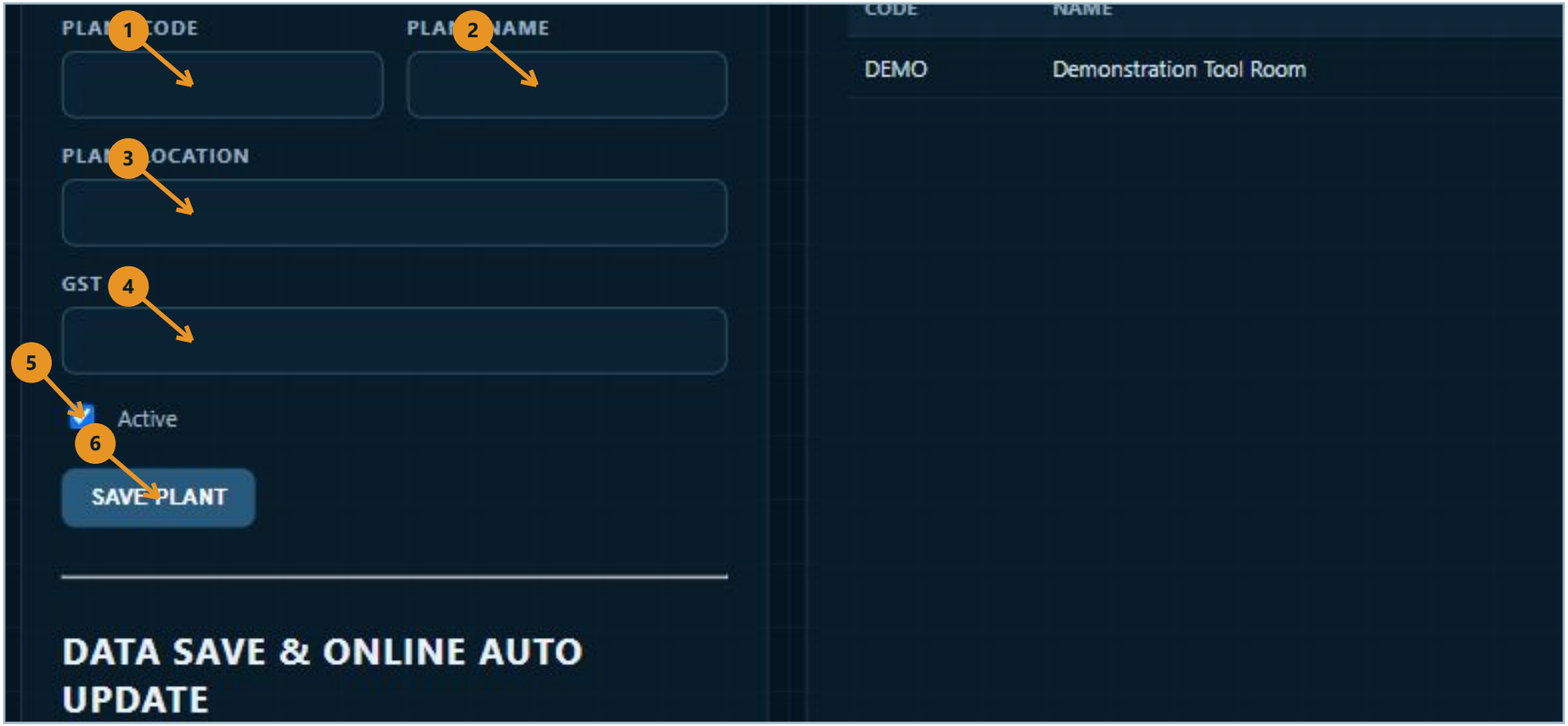
2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 03 • orange numbers point to the named controls



1. PLANT CODE
Enter or review this value as labeled

2. PLANT NAME
Enter or review this value as labeled

3. PLANT LOCATION
Enter or review this value as labeled

4. GST NO.
Enter or review this value as labeled

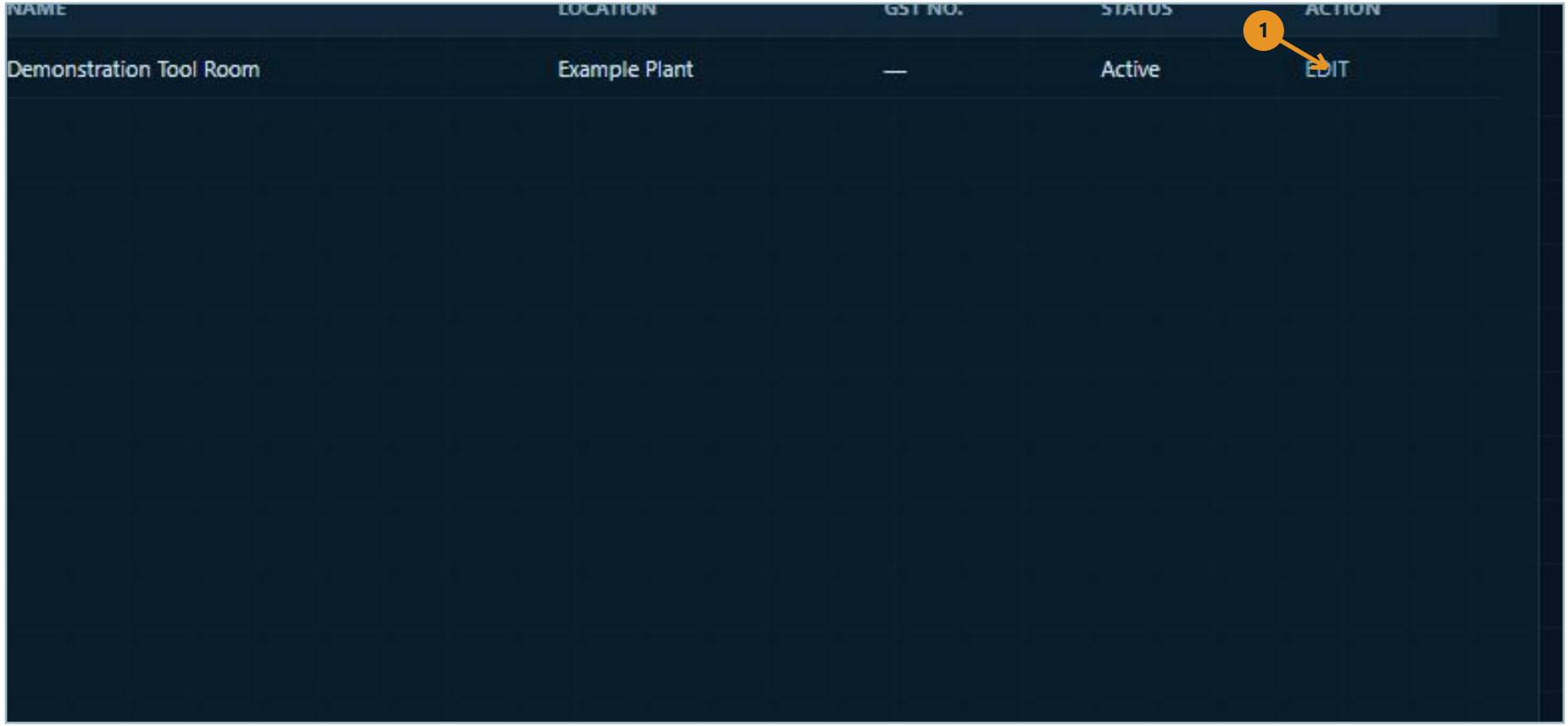
5. Active
Tick to enable this option; clear to disable it

6. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 04 • orange numbers point to the named controls

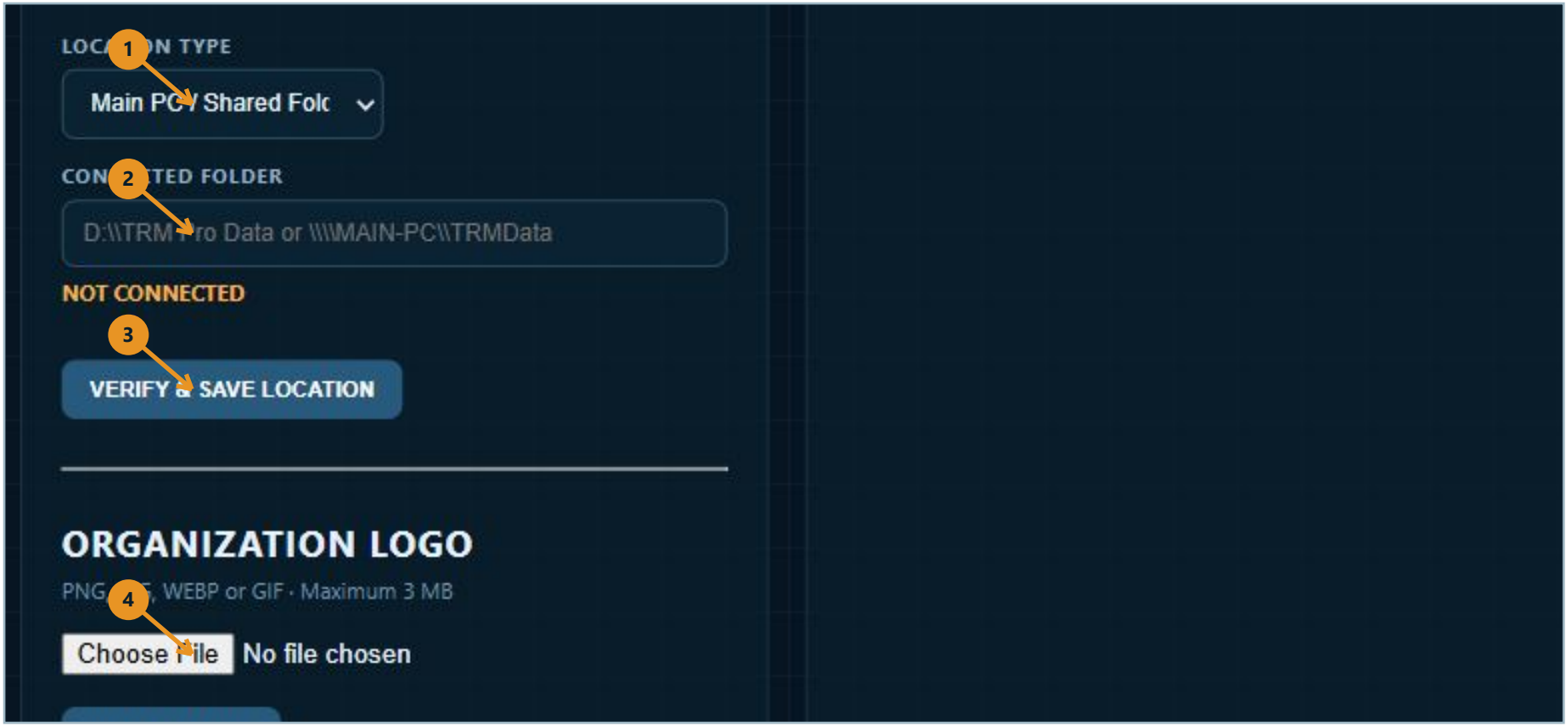


1. EDIT
Open the selected saved record for correction

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 05 • orange numbers point to the named controls



1. Data Location Type
Choose the required value

2. CONNECTED FOLDER
Enter or review this value as labeled

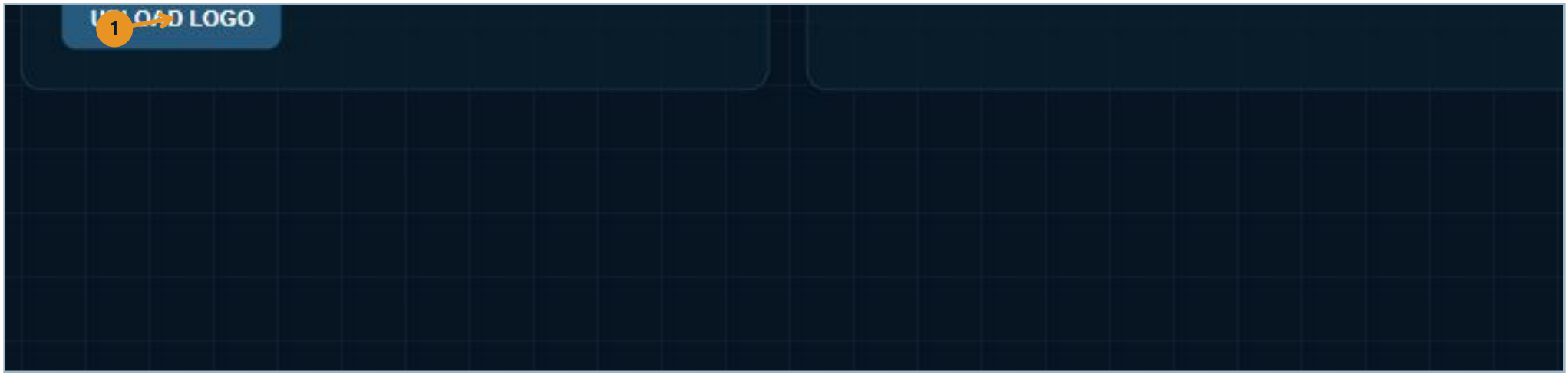
3. VERIFY & SAVE LOCATION
Use this named action/tab for the workflow described in this chapter

4. organization_logo
Choose the appropriate file from this PC, then use the corresponding upload/add action.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Illustrated detail 06 • orange numbers point to the named controls



1. UPLOAD LOGO
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

07 Master Data: plants, company logo and data connection

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
PLANT CODE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PLANT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PLANT LOCATION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
GST NO.	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Data Location Type	Choose the required value. Available choices: Main PC / Shared Folder; OneDrive Folder; Google Drive Folder. The displayed records follow this screen's scope and account access.
CONNECTED FOLDER	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

VERIFY & SAVE LOCATION	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
organization_logo	Choose the appropriate file from this PC, then use the corresponding upload/add action.
UPLOAD LOGO	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.

08 Master Data: departments

Workflow • read before using the illustrated controls

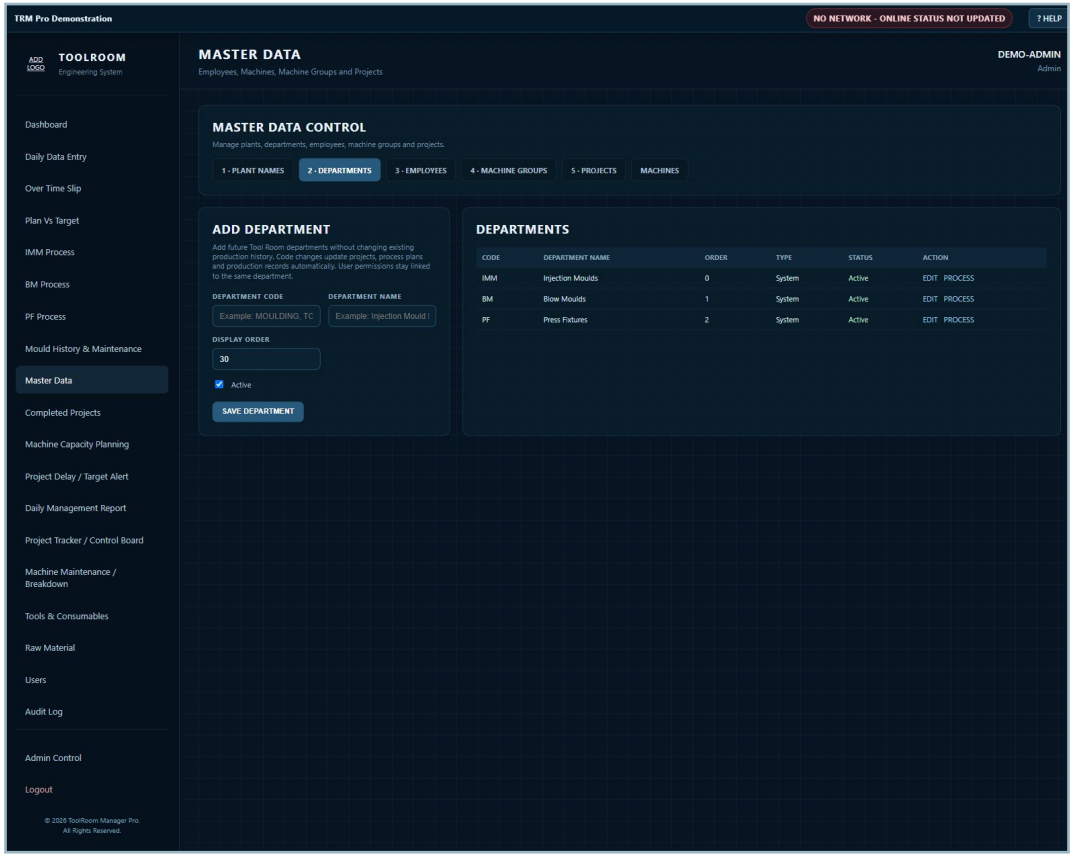
1. Add a short unique department code and descriptive department name.
2. Link the department to its plant where the form requests it. Set Active as appropriate and save.
3. Use EDIT to change an existing record. Users and projects should use the correct department.

Worked example

IMM = Injection Moulds, BM = Blow Moulds, PF = Press Fixtures. Your installation may use its own names.

08 Master Data: departments

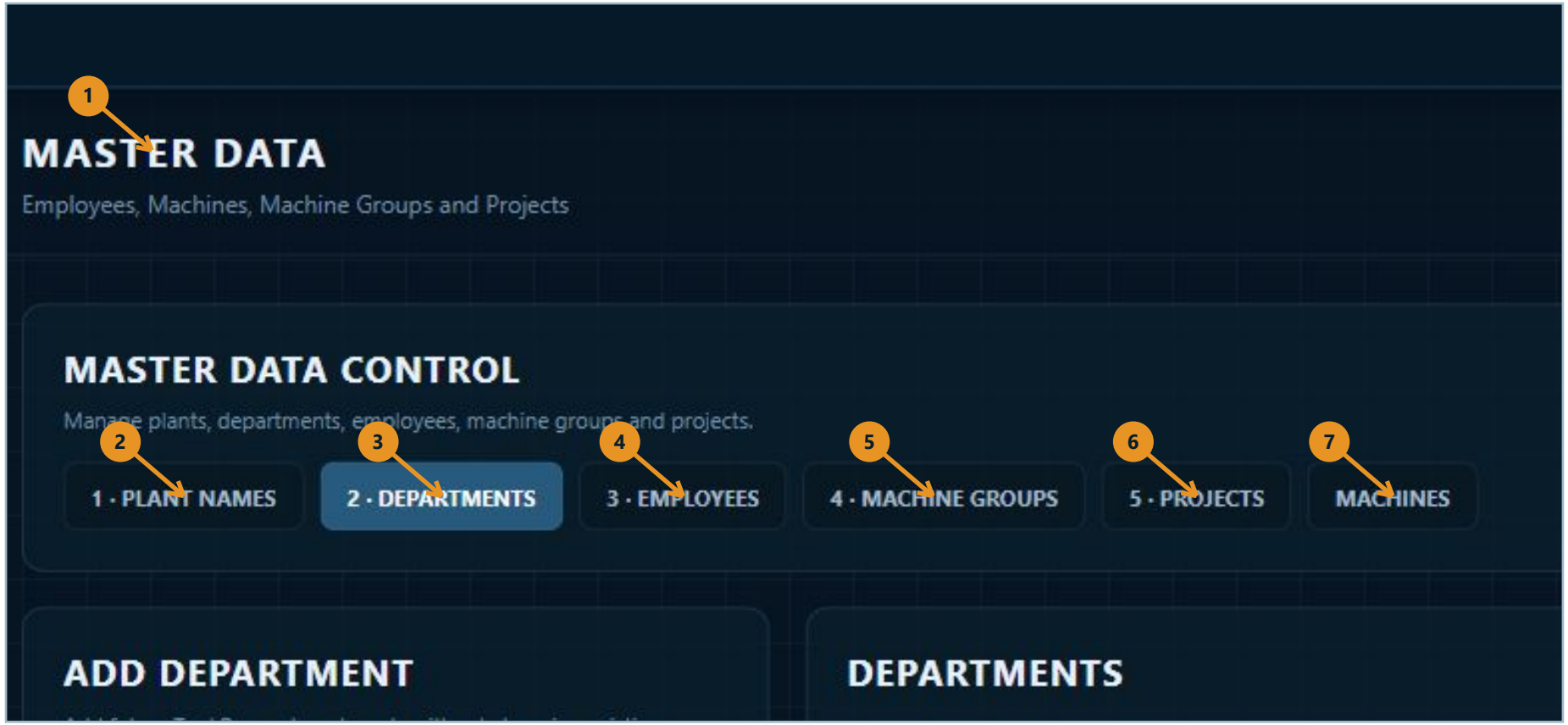
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

08 Master Data: departments

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

08 Master Data: departments

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

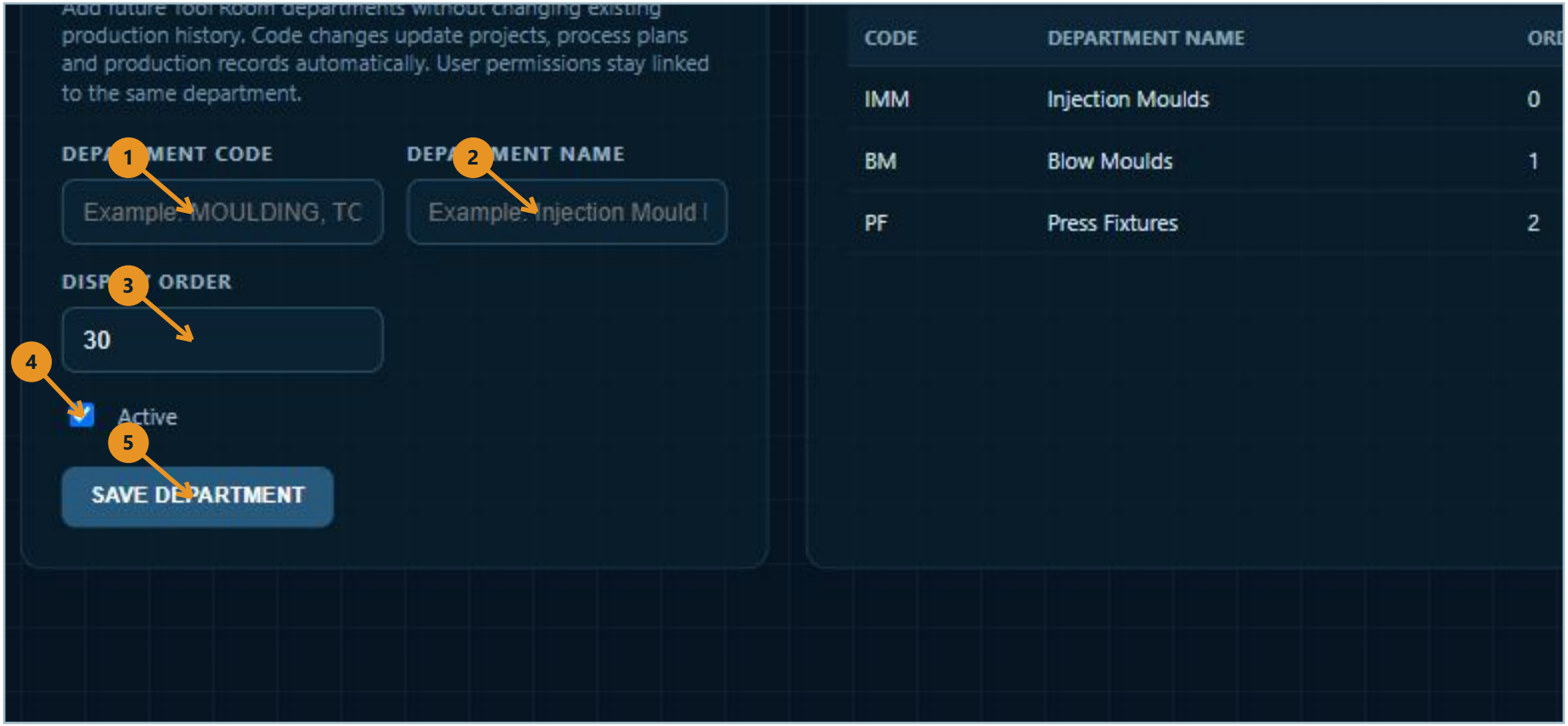
2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

08 Master Data: departments

Illustrated detail 03 • orange numbers point to the named controls



1. DEPARTMENT CODE
Enter or review this value as labeled

2. DEPARTMENT NAME
Enter or review this value as labeled

3. DISPLAY ORDER
Enter the numeric quantity/time required by the label

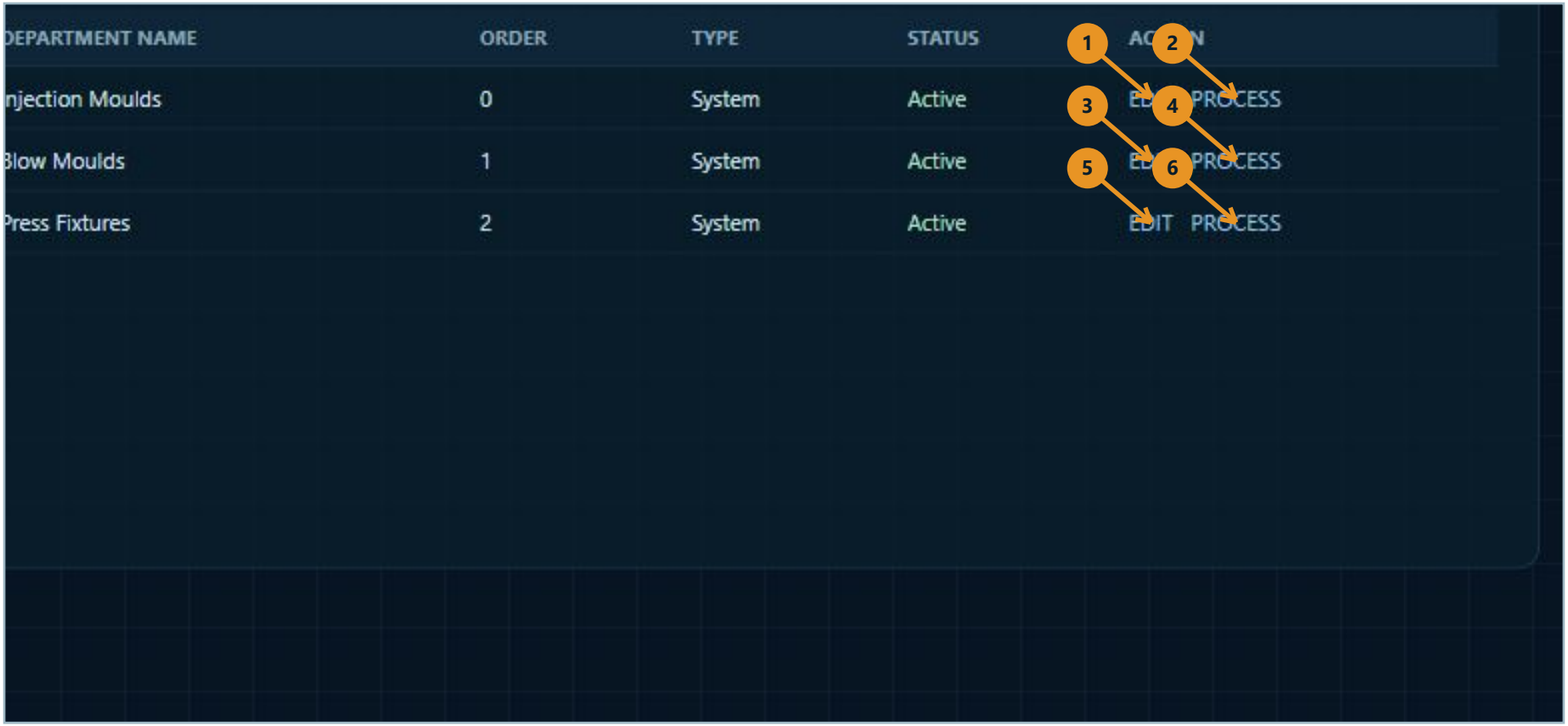
4. Active
Tick to enable this option; clear to disable it

5. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

08 Master Data: departments

Illustrated detail 04 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. PROCESS
Use this named action/tab for the workflow described in this chapter

3. EDIT
Open the selected saved record for correction

4. PROCESS
Use this named action/tab for the workflow described in this chapter

5. EDIT
Open the selected saved record for correction

6. PROCESS
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

08 Master Data: departments

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
DEPARTMENT CODE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DEPARTMENT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DISPLAY ORDER	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
PROCESS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

09 Master Data: employees and overtime eligibility

Workflow • read before using the illustrated controls

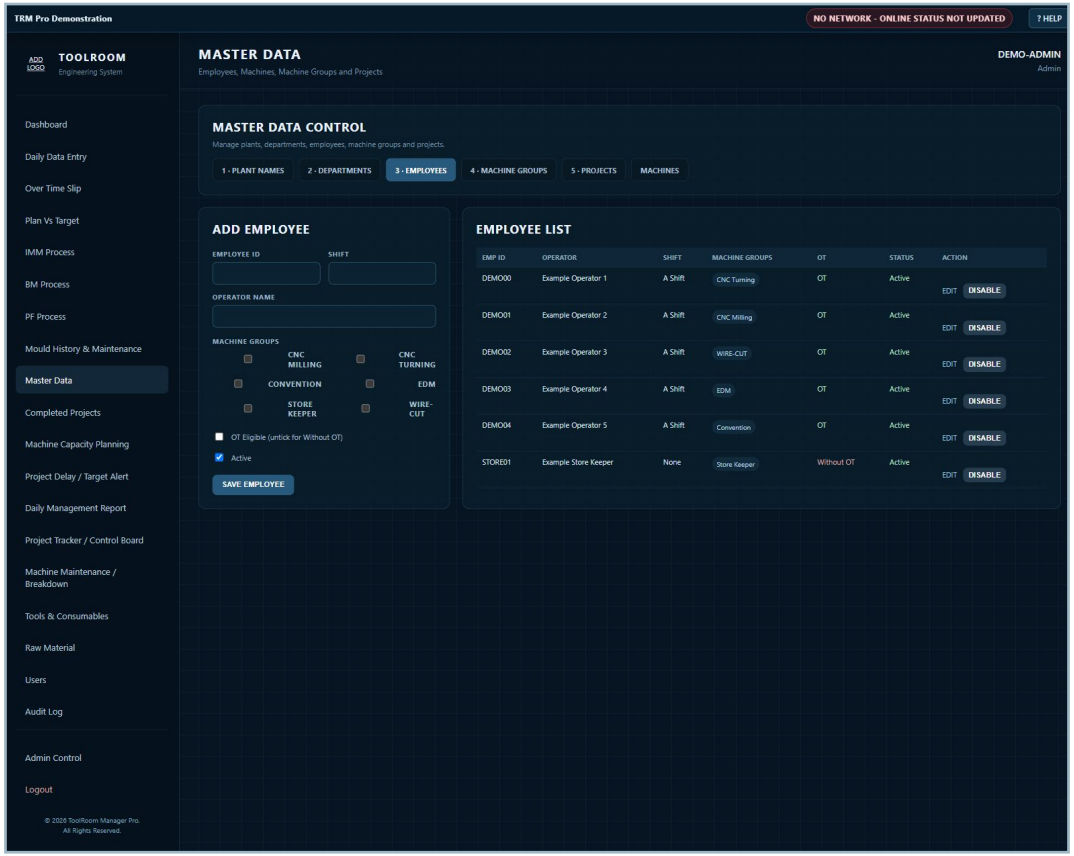
1. Create each employee with a unique Employee ID and name. Select the relevant department and machine group.
2. Set the employee Active status and OT eligibility/Without OT selection according to approved policy.
3. Save the employee before creating the corresponding login account. Employee records and user accounts have different purposes.
4. Use EDIT to correct the details. Verify OT eligibility before preparing an overtime slip.

Practical notes

The employee OT setting affects the overtime statement. G Shift 9:00 AM to 6:00 PM has no OT under the current rule. Do not change an employee identity to correct an ordinary production entry.

09 Master Data: employees and overtime eligibility

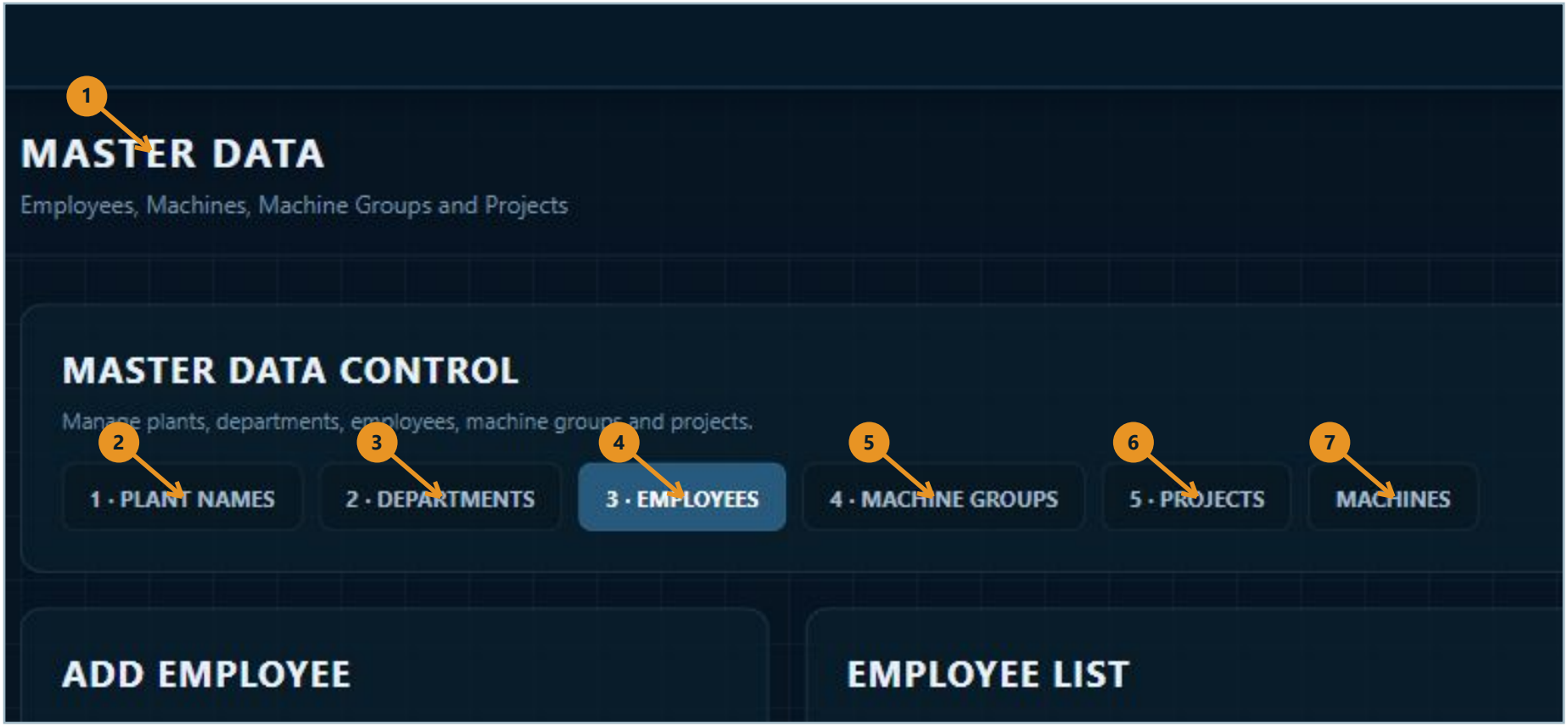
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 03 • orange numbers point to the named controls



1. EMPLOYEE ID
Enter or review this value as labeled

2. SHIFT
Enter or review this value as labeled

3. OPERATOR NAME
Enter or review this value as labeled

4. CNC MILLING
Tick to enable this option; clear to disable it

5. CNC TURNING
Tick to enable this option; clear to disable it

6. CONVENTION
Tick to enable this option; clear to disable it

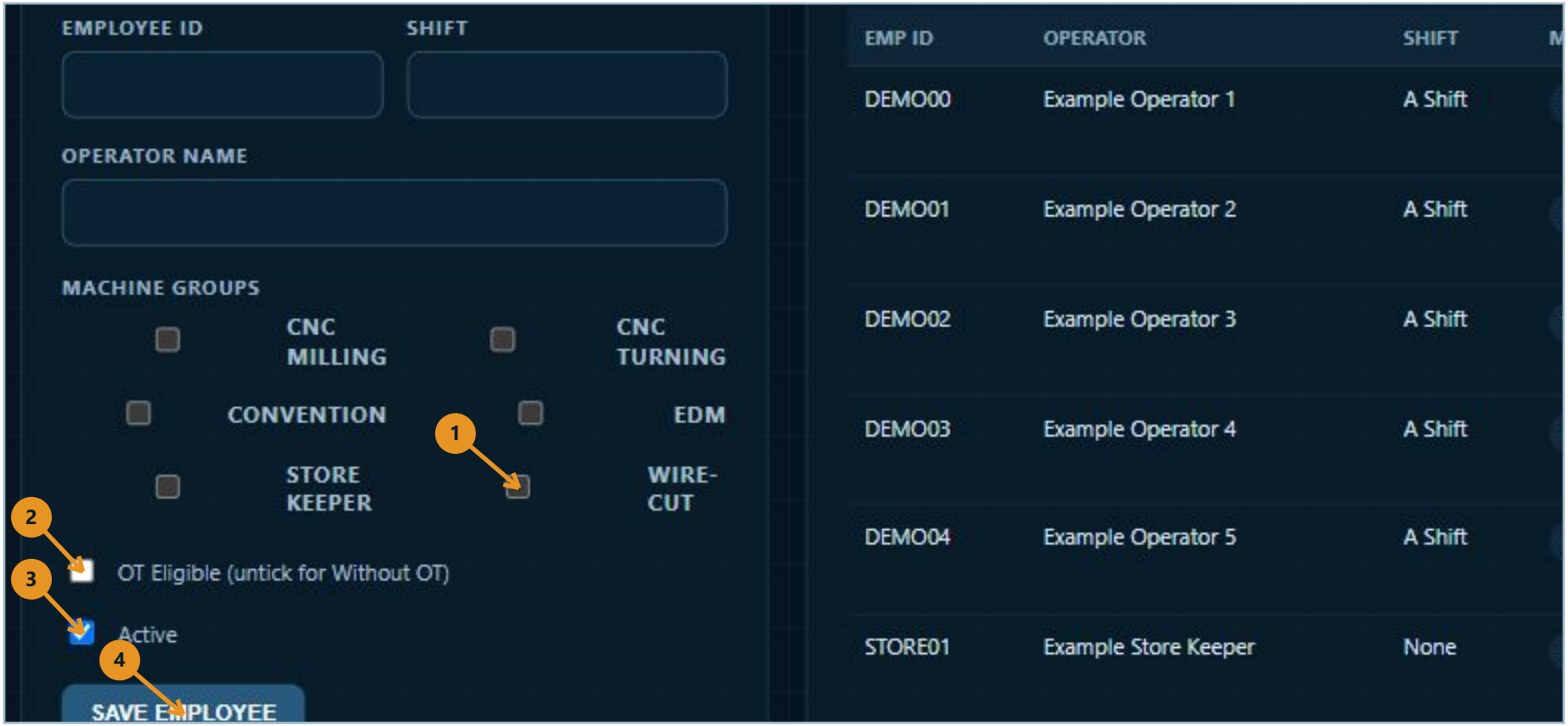
7. EDM
Tick to enable this option; clear to disable it

8. STORE KEEPER
Tick to enable this option; clear to disable it

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 04 • orange numbers point to the named controls



1. WIRE-CUT
Tick to enable this option; clear to disable it

2. OT Eligible (untick for Without OT)
Tick to enable this option; clear to disable it

3. Active
Tick to enable this option; clear to disable it

4. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 05 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DISABLE
Use this named action/tab for the workflow described in this chapter

3. EDIT
Open the selected saved record for correction

4. DISABLE
Use this named action/tab for the workflow described in this chapter

5. EDIT
Open the selected saved record for correction

6. DISABLE
Use this named action/tab for the workflow described in this chapter

7. EDIT
Open the selected saved record for correction

8. DISABLE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Illustrated detail 06 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DISABLE
Use this named action/tab for the workflow described in this chapter

3. EDIT
Open the selected saved record for correction

4. DISABLE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

09 Master Data: employees and overtime eligibility

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EMPLOYEE ID	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SHIFT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
OPERATOR NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
CNC MILLING	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
CNC TURNING	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
CONVENTION	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
EDM	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
STORE KEEPER	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.

WIRE-CUT	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
OT Eligible (untick for Without OT)	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DISABLE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

10 Master Data: machine groups and store keepers

Workflow • read before using the illustrated controls

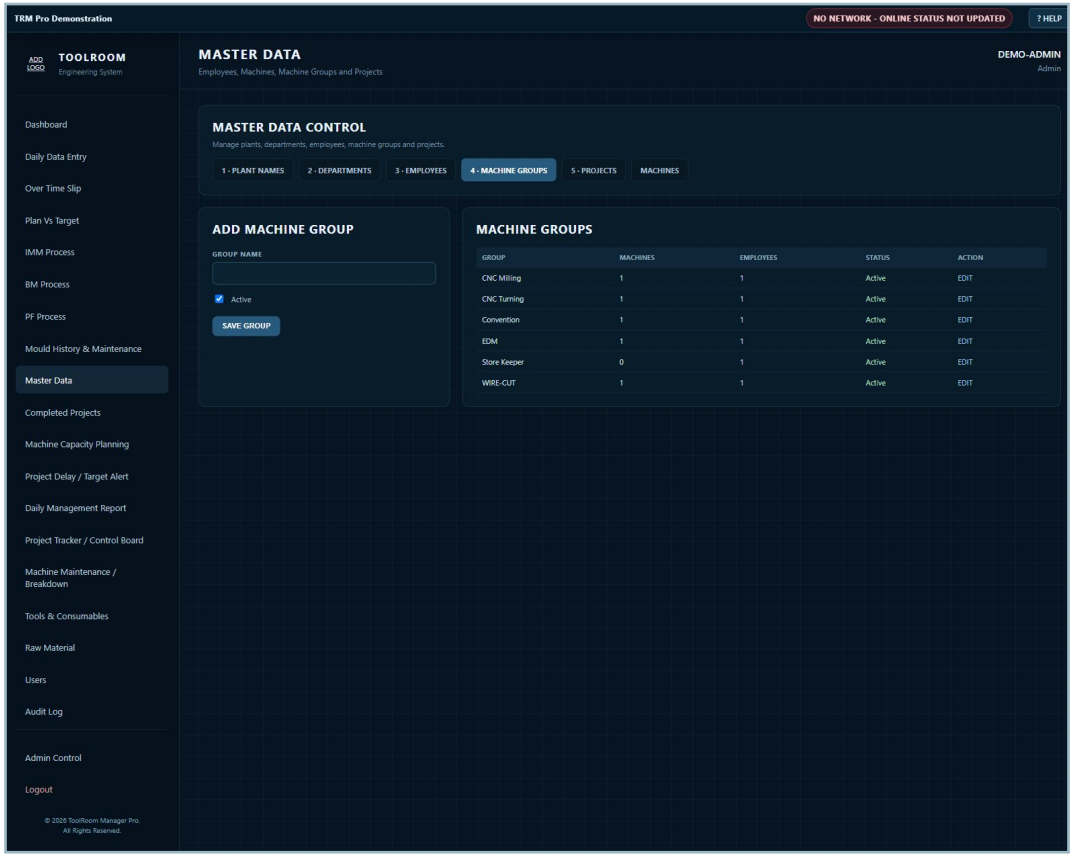
1. Create meaningful groups such as CNC Turning, CNC Milling, WIRE-CUT, EDM and Convention.
2. Use the Store Keeper group for employees who receive material in stores.
3. Save the group, then assign machines/employees and user access as needed.

Practical notes

Machine group access controls the scheduled project choices available to an ordinary group user. This filter is based on the group, not on the selected date alone. Admin can see broader data.

10 Master Data: machine groups and store keepers

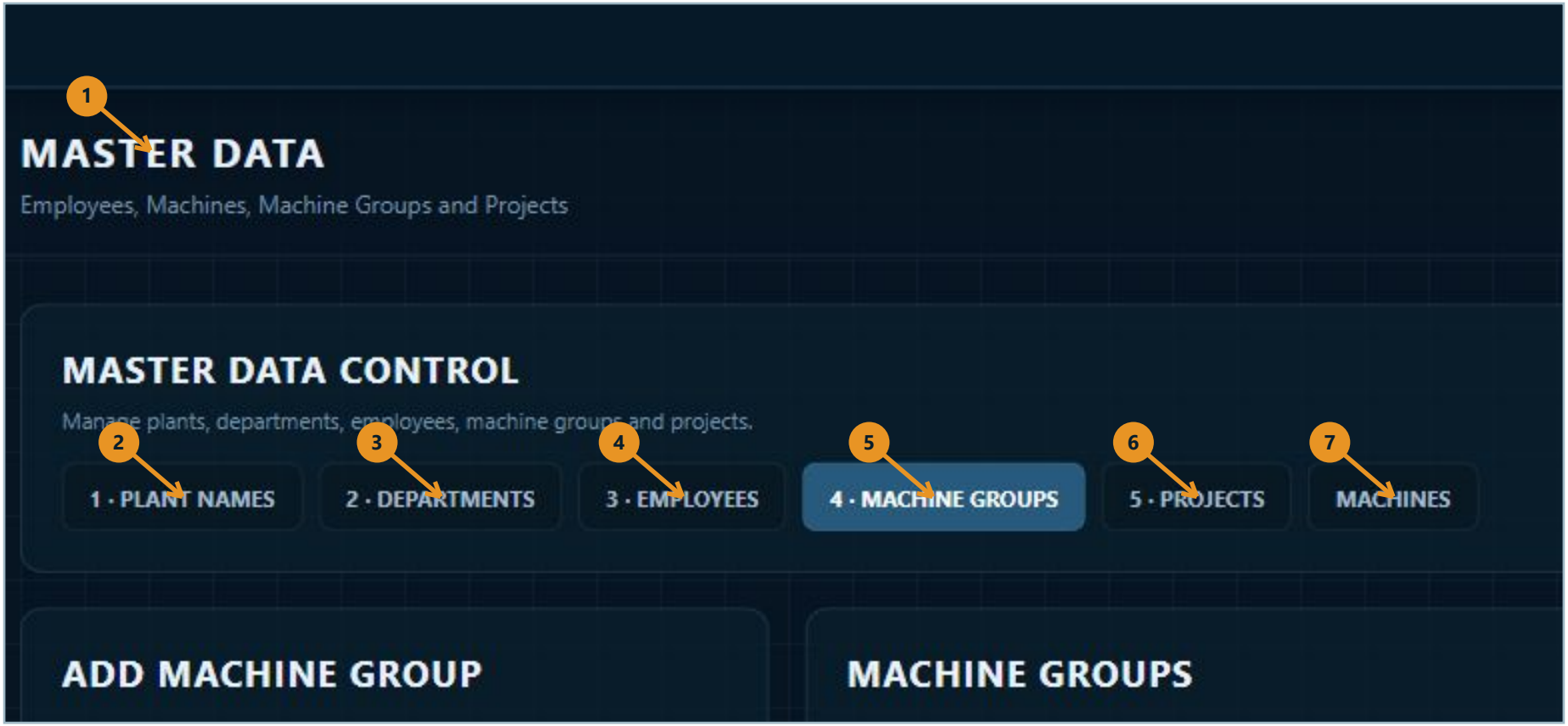
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

10 Master Data: machine groups and store keepers

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

10 Master Data: machine groups and store keepers

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

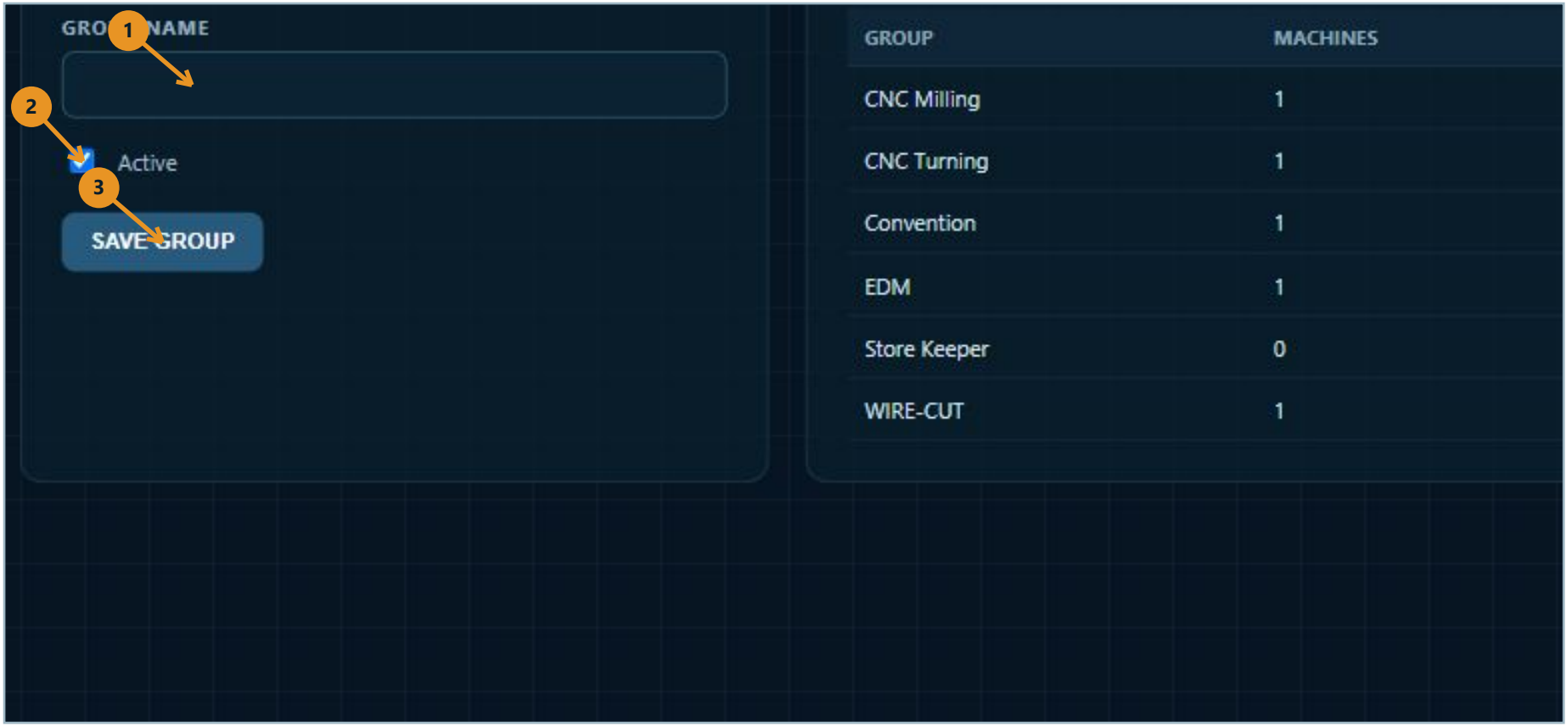
2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

10 Master Data: machine groups and store keepers

Illustrated detail 03 • orange numbers point to the named controls



1. GROUP NAME
Enter or review this value as labeled

2. Active
Tick to enable this option; clear to disable it

3. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

10 Master Data: machine groups and store keepers

Illustrated detail 04 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. EDIT
Open the selected saved record for correction

3. EDIT
Open the selected saved record for correction

4. EDIT
Open the selected saved record for correction

5. EDIT
Open the selected saved record for correction

6. EDIT
Open the selected saved record for correction

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

10 Master Data: machine groups and store keepers

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
GROUP NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.

11 Master Data: projects

Workflow • read before using the illustrated controls

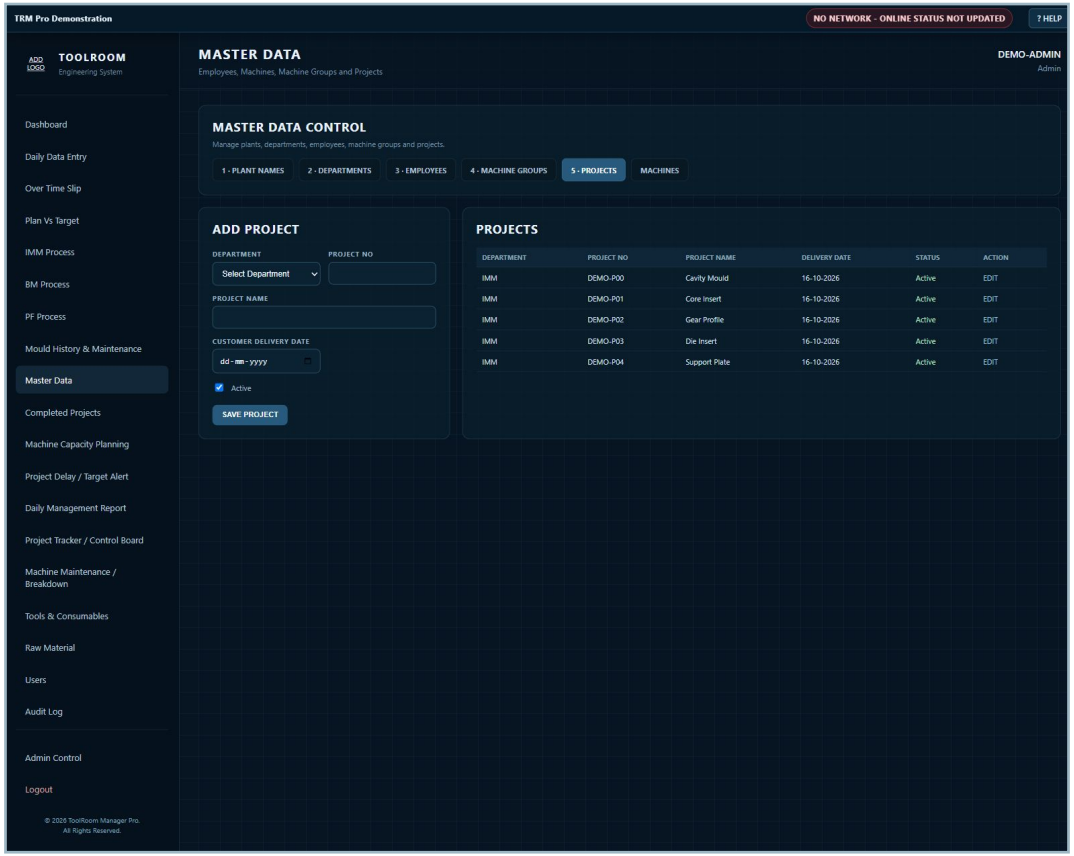
1. Add the Project No. and Project Name in the correct department.
2. Enter the delivery/target and other requested project details. Set the usable status and save.
3. Use the project consistently when adding parts, process plans, daily output and stock issues.

Worked example

DEMO-P00 / Cavity Mould is a demonstration identifier. Use your actual project number in production.

11 Master Data: projects

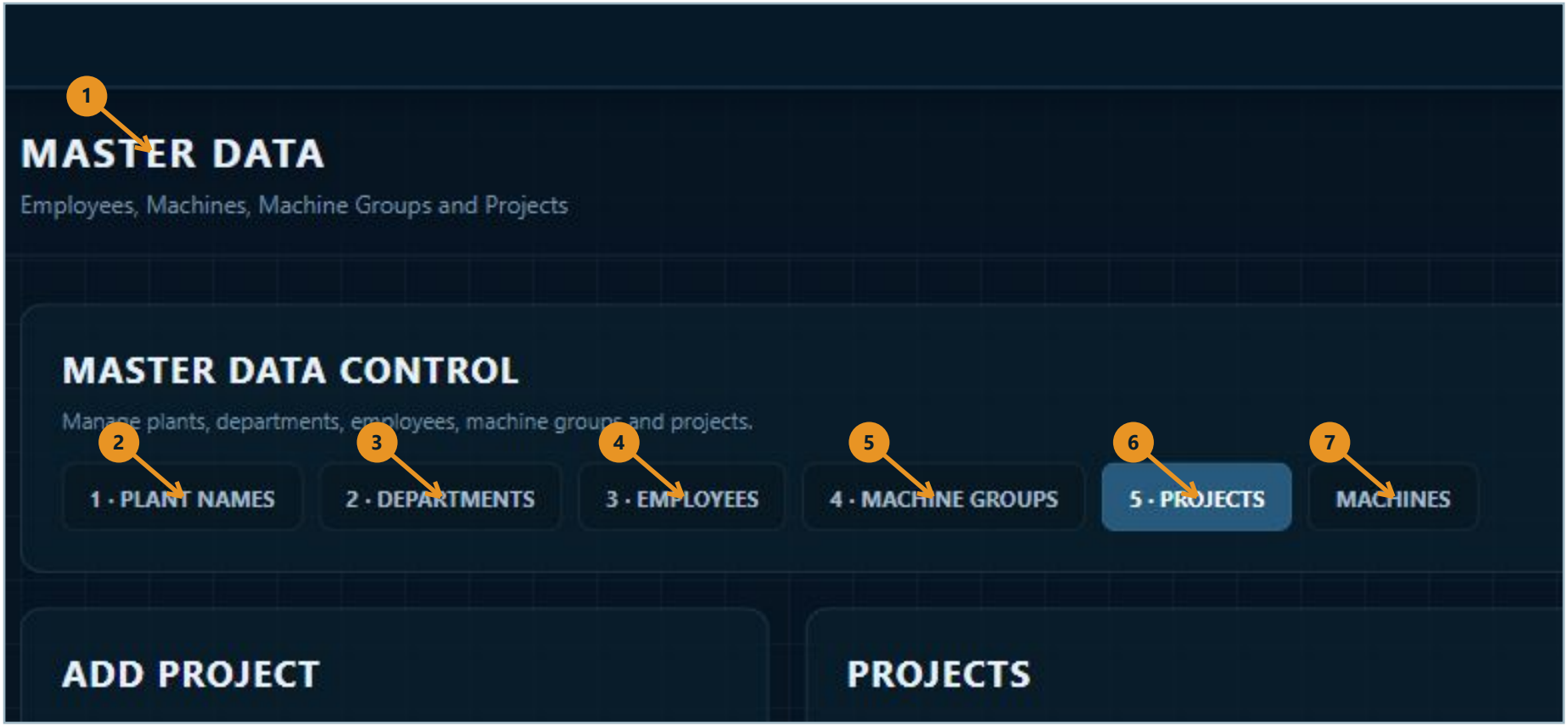
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

11 Master Data: projects

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

11 Master Data: projects

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

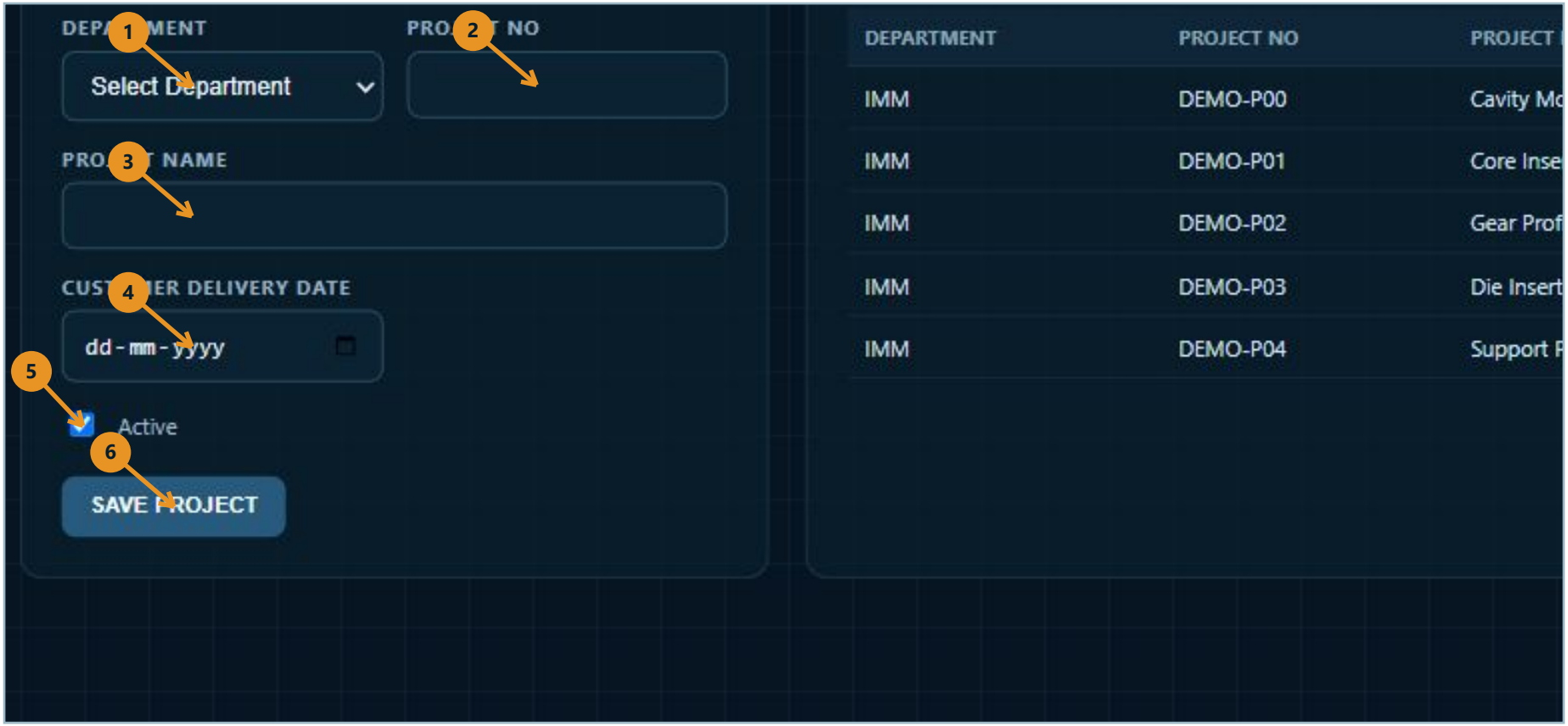
2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

11 Master Data: projects

Illustrated detail 03 • orange numbers point to the named controls



1. Department
Choose the required value

2. PROJECT NO
Enter or review this value as labeled

3. PROJECT NAME
Enter or review this value as labeled

4. CUSTOMER DELIVERY DATE
Select the actual reference date/time for this record or report

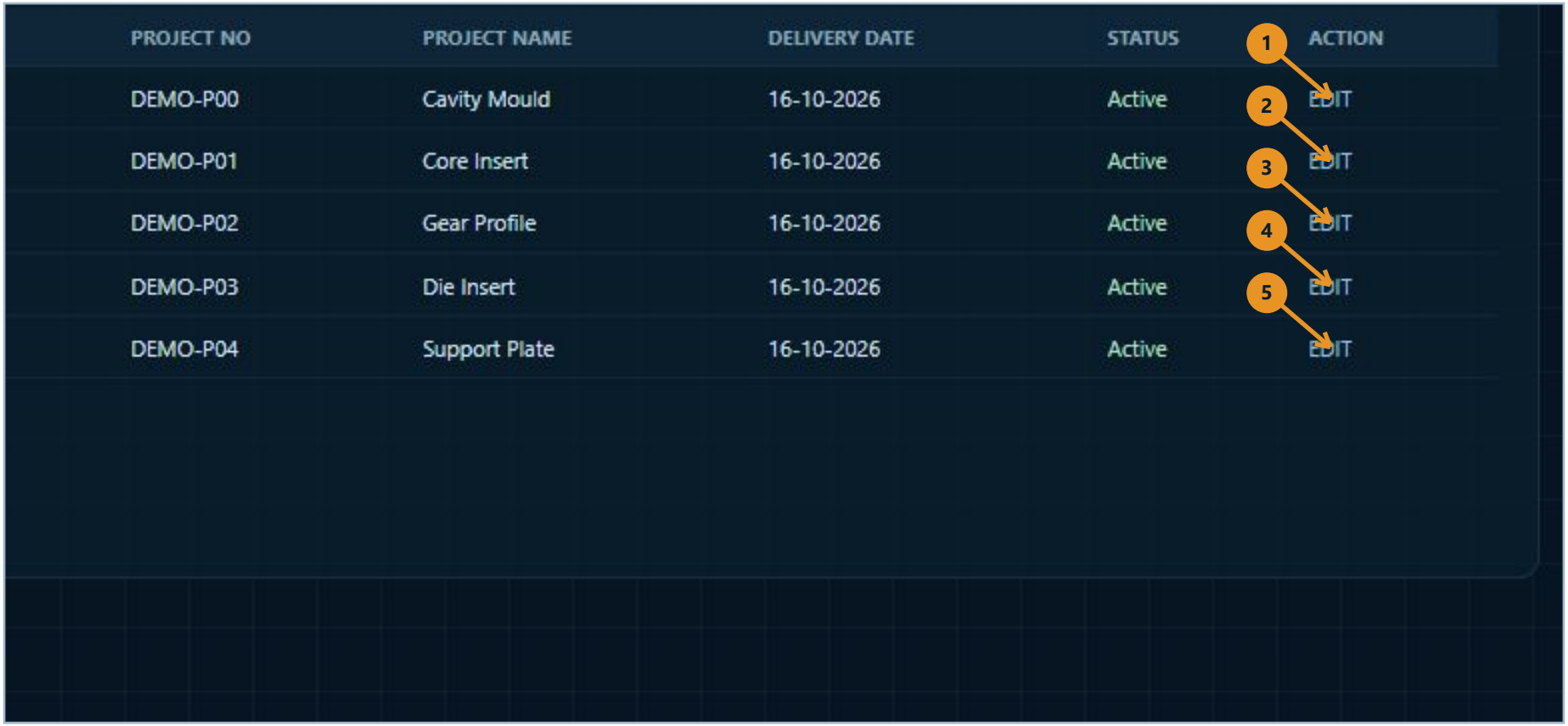
5. Active
Tick to enable this option; clear to disable it

6. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

11 Master Data: projects

Illustrated detail 04 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. EDIT
Open the selected saved record for correction

3. EDIT
Open the selected saved record for correction

4. EDIT
Open the selected saved record for correction

5. EDIT
Open the selected saved record for correction

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

11 Master Data: projects

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Department	Choose the required value. Available choices: Select Department; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
PROJECT NO	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
CUSTOMER DELIVERY DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.

12 Master Data: machines

Workflow • read before using the illustrated controls

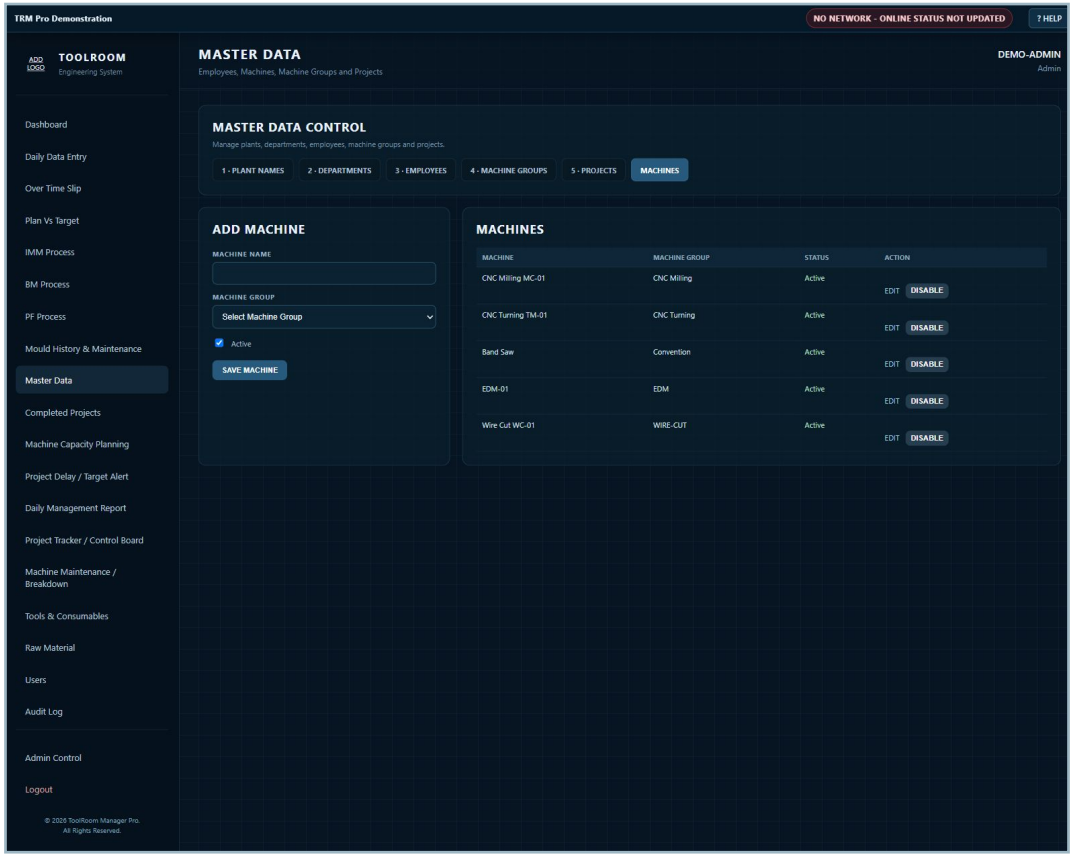
1. Add the unique machine identifier/name and select its machine group.
2. Enter the available fields and keep Active checked for machines that can be selected.
3. Save, then verify the machine appears in process planning and daily entry under the correct group.

Practical notes

Machine Availability currently shows calendar gaps. Machine shift calendars are not configured, so a visible calendar gap is not automatically a staffed working shift.

12 Master Data: machines

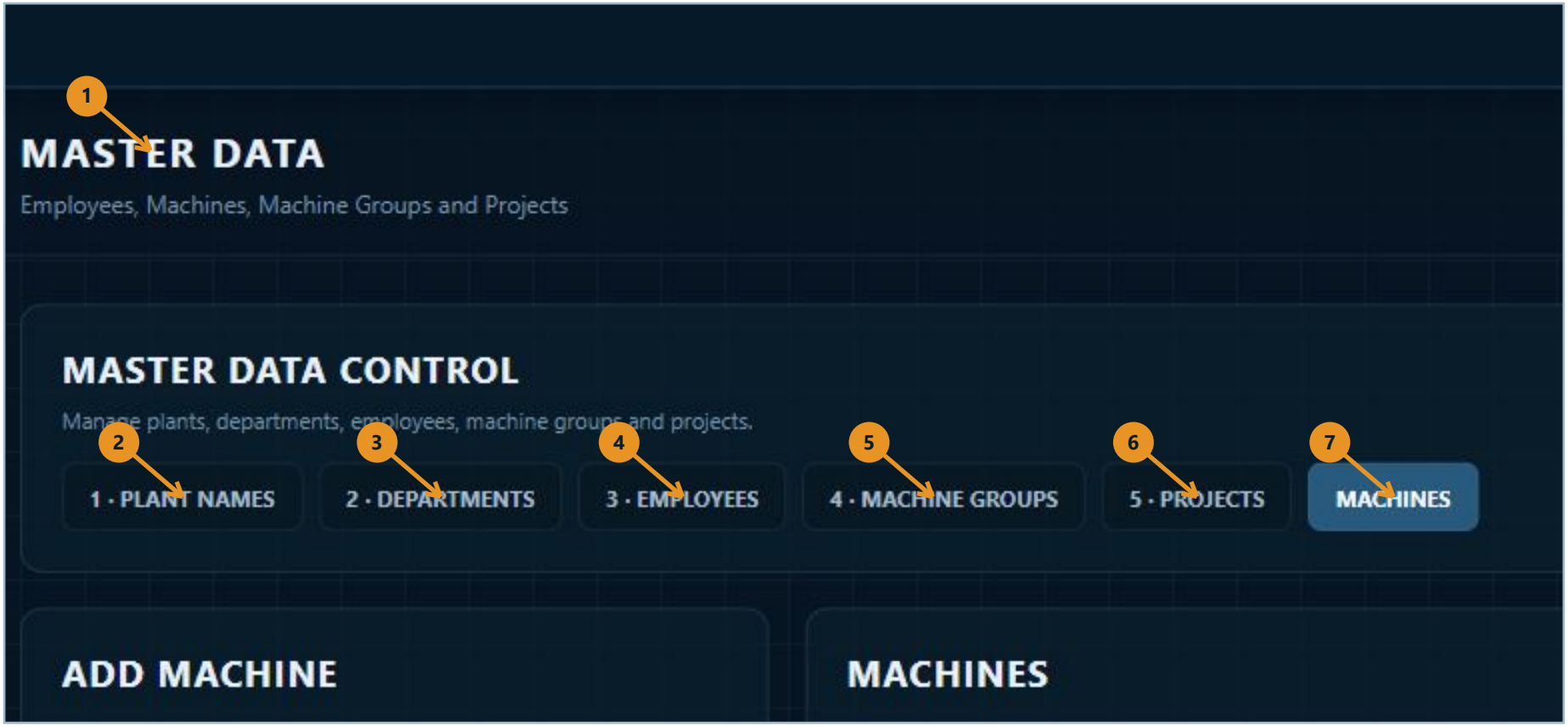
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Illustrated detail 01 • orange numbers point to the named controls



1. MASTER DATA
Enter or review this value as labeled

2. 1 · PLANT NAMES
Use this named action/tab for the workflow described in this chapter

3. 2 · DEPARTMENTS
Use this named action/tab for the workflow described in this chapter

4. 3 · EMPLOYEES
Use this named action/tab for the workflow described in this chapter

5. 4 · MACHINE GROUPS
Use this named action/tab for the workflow described in this chapter

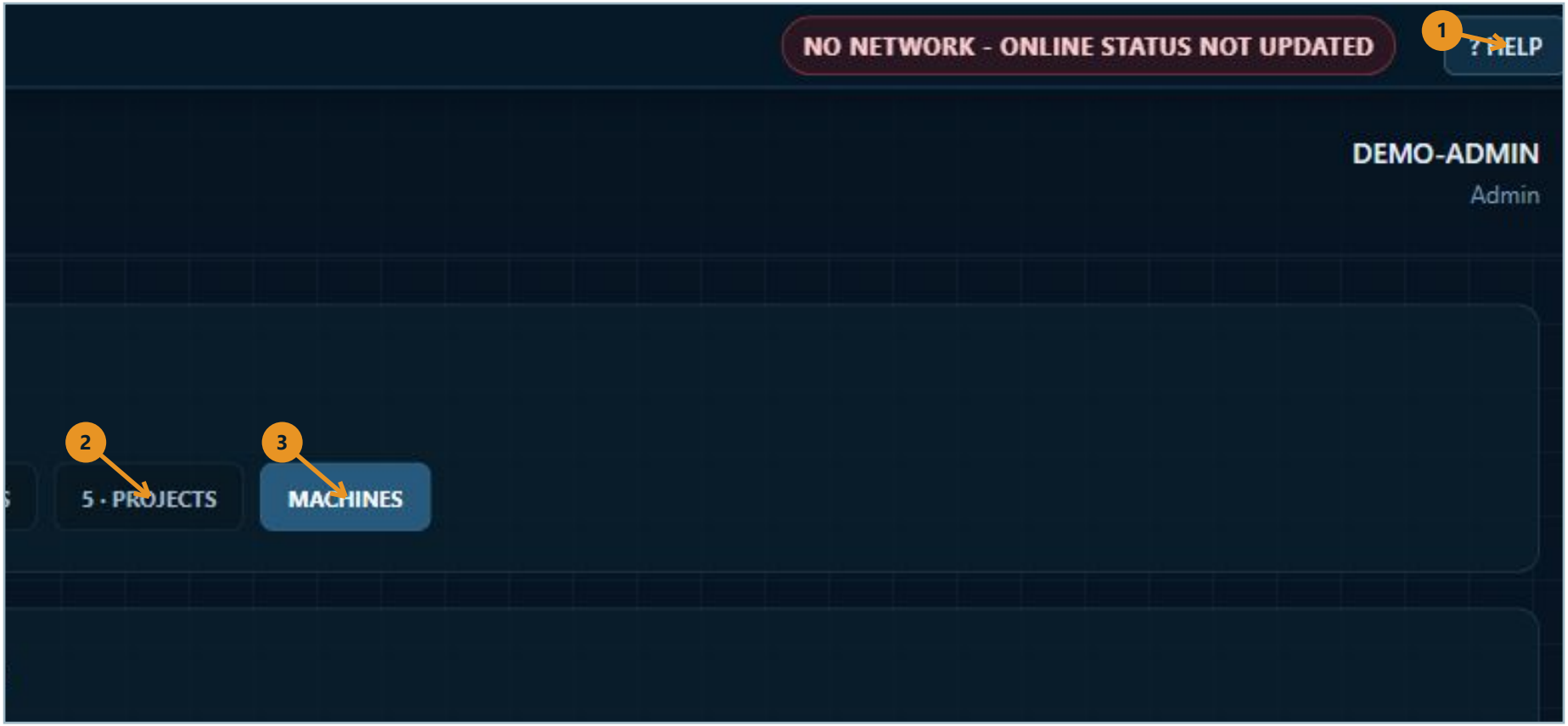
6. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

7. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. 5 · PROJECTS
Use this named action/tab for the workflow described in this chapter

3. MACHINES
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Illustrated detail 03 • orange numbers point to the named controls



1. MACHINE NAME
Enter or review this value as labeled

2. Machine Group Id
Choose the required value

3. Active
Tick to enable this option; clear to disable it

4. Active
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Illustrated detail 04 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DISABLE
Use this named action/tab for the workflow described in this chapter

3. EDIT
Open the selected saved record for correction

4. DISABLE
Use this named action/tab for the workflow described in this chapter

5. EDIT
Open the selected saved record for correction

6. DISABLE
Use this named action/tab for the workflow described in this chapter

7. EDIT
Open the selected saved record for correction

8. DISABLE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Illustrated detail 05 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DISABLE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

12 Master Data: machines

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MASTER DATA	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
1 · PLANT NAMES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
2 · DEPARTMENTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
3 · EMPLOYEES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
4 · MACHINE GROUPS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
5 · PROJECTS	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINES	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINE NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Machine Group Id	Choose the required value. Available choices: Select Machine Group; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DISABLE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

13 Users: account creation and permission matrix

Workflow • read before using the illustrated controls

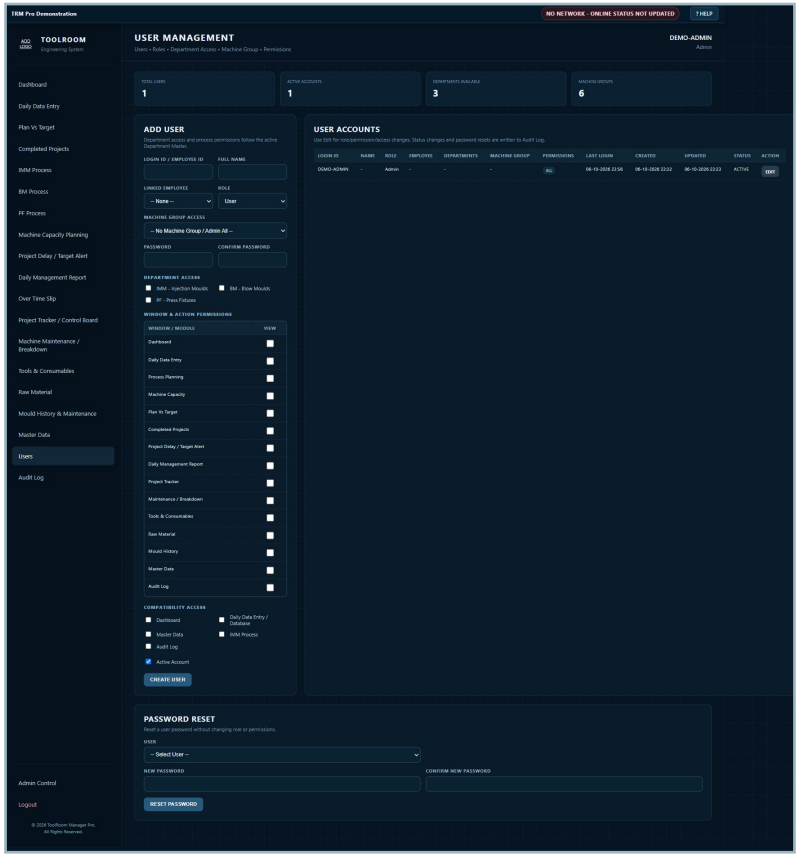
1. Admin opens Users, creates the login ID and account details, then links the employee where required.
2. Select the role, allowed department(s) and machine group. Give the minimum module permissions needed for the job.
3. For every module, independently choose View, Add / New, Edit, Delete, Export Excel and Export PDF as appropriate. A module checkbox does not automatically justify every action.
4. Keep Active Account checked for a usable account, then choose CREATE USER. Use EDIT for later account/access changes.
5. Under PASSWORD RESET choose the existing user, enter and confirm the new password, then reset. Communicate the credentials privately.
6. Verify access using the intended account. A Store Keeper should see stores screens and should not be able to add production, maintenance or mould records unless those actions are authorized.

Practical notes

View and Add are different rights. Permission denied means the current account lacks that action; it is not a reason to give all permissions. Admin changes to role, status and passwords are recorded in Audit Log. Compatibility Access fields support older access settings; use the module/action matrix for deliberate control.

13 Users: account creation and permission matrix

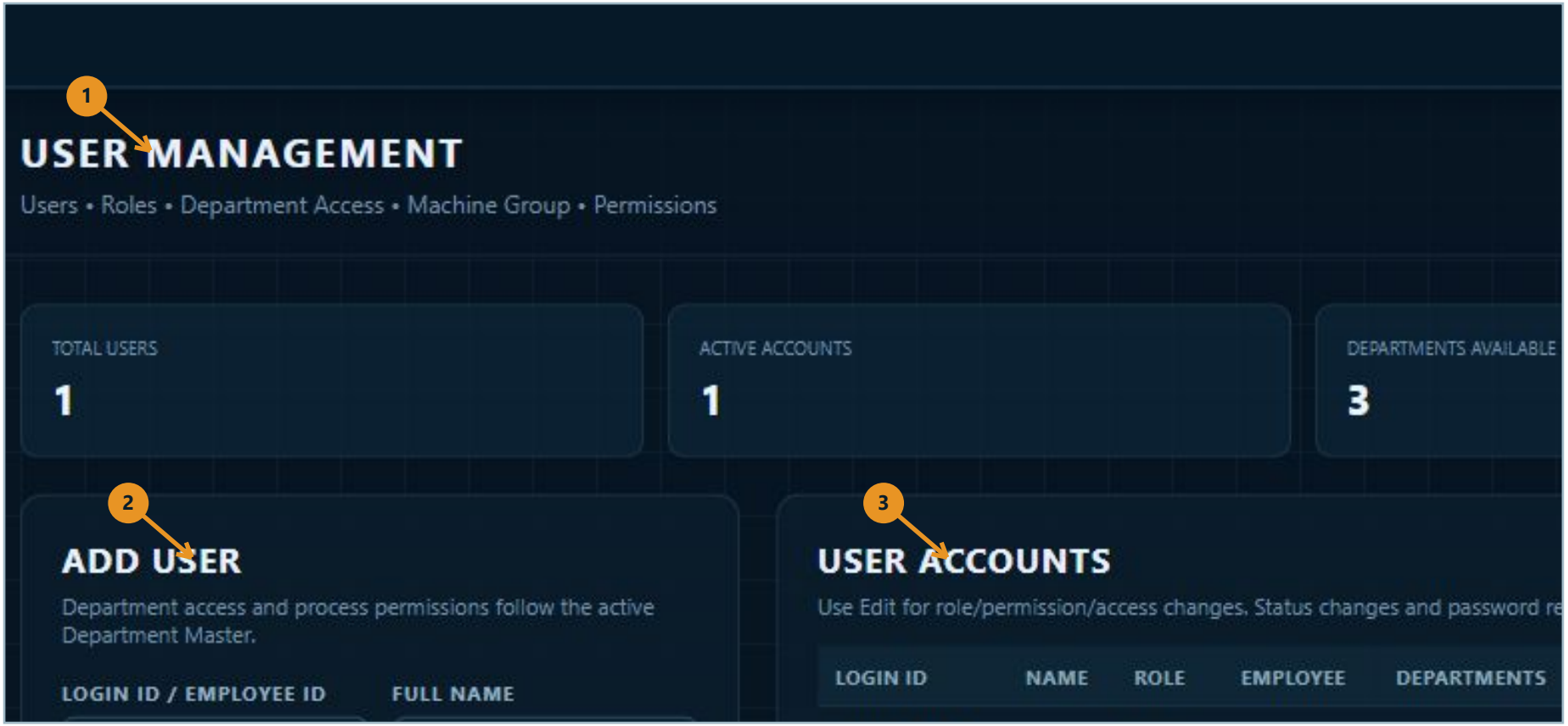
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 01 • orange numbers point to the named controls



1. USER MANAGEMENT
Enter or review this value as labeled

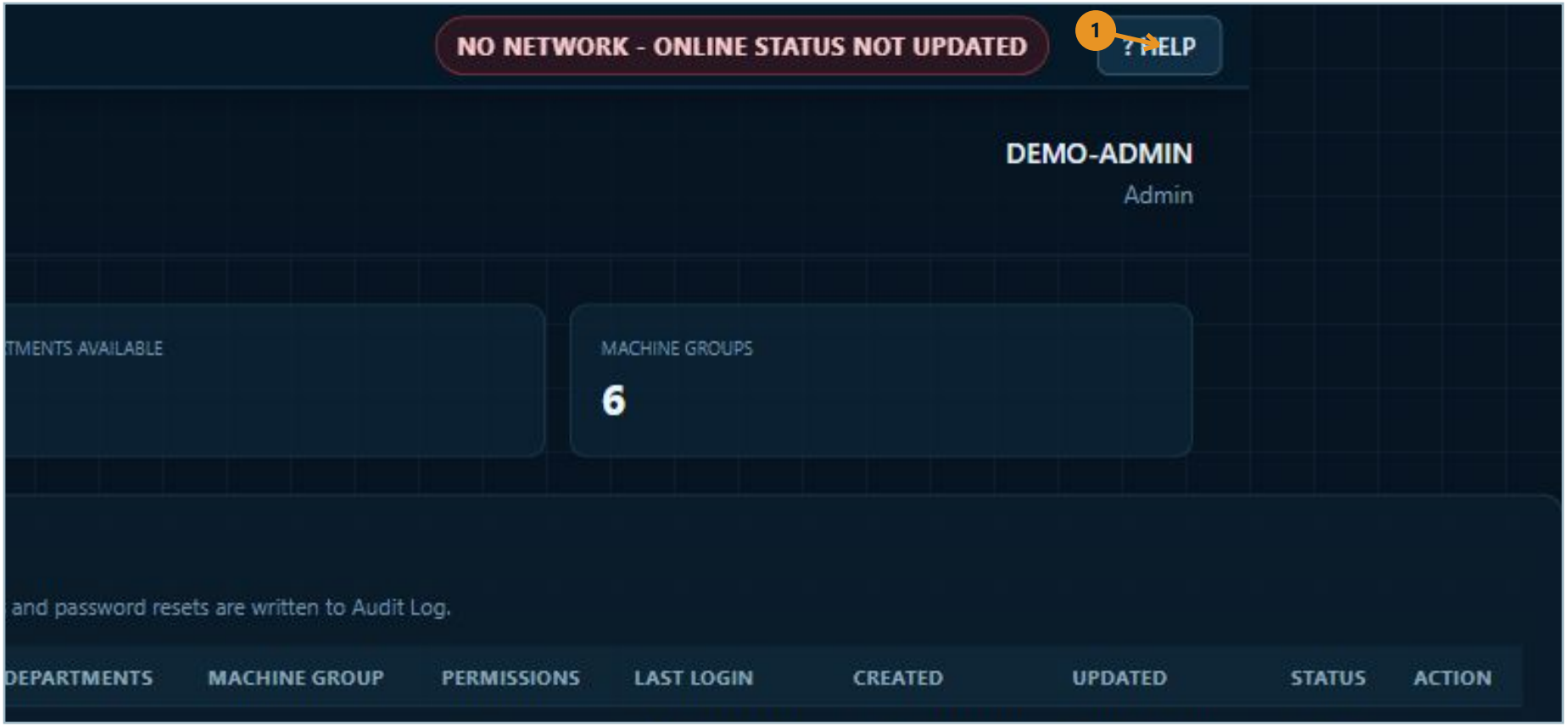
2. ADD USER
Enter or review this value as labeled

3. USER ACCOUNTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 02 • orange numbers point to the named controls

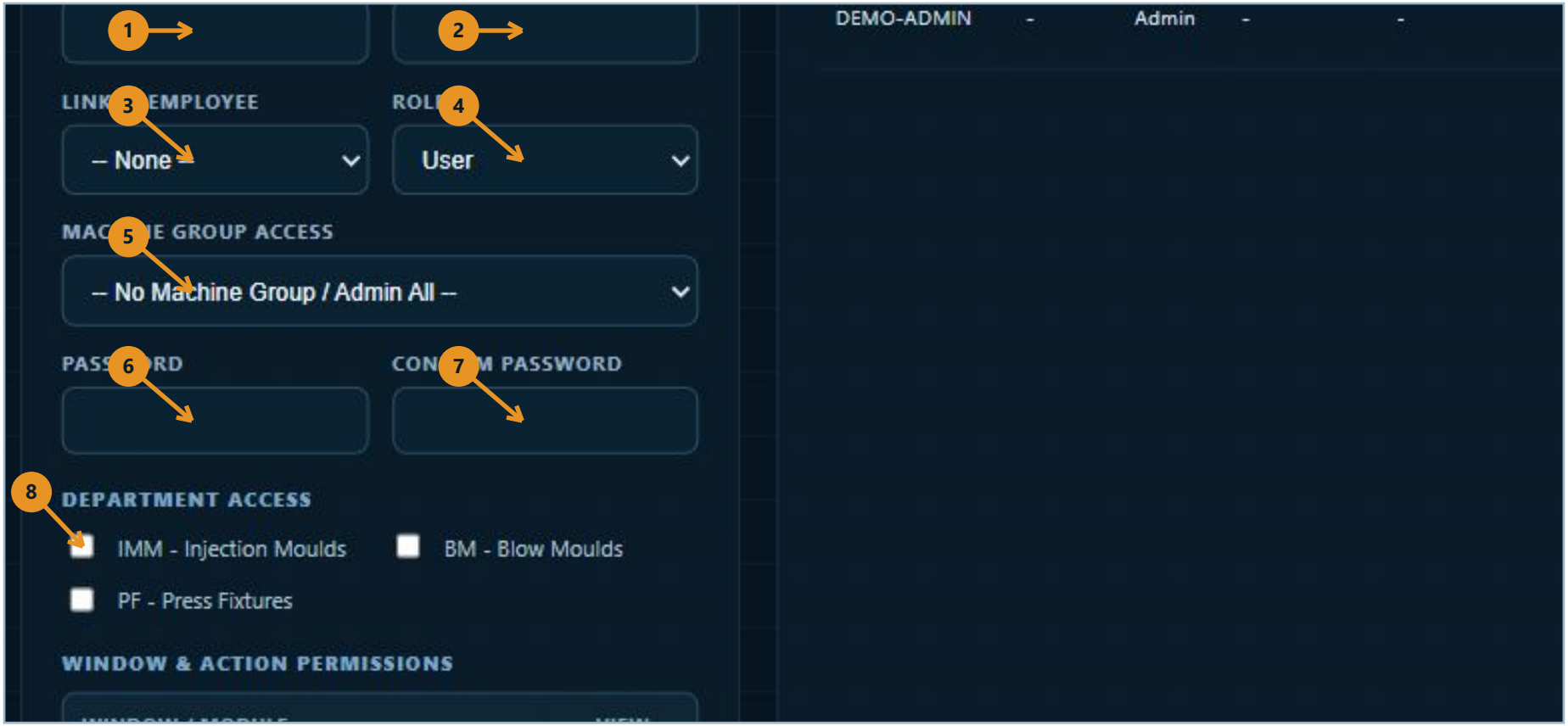


1. Help - User Manual
Open the bundled PDF manual in TRM Pro

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 03 • orange numbers point to the named controls



1. LOGIN ID / EMPLOYEE ID
Enter or review this value as labeled

2. FULL NAME
Enter or review this value as labeled

3. Employee Id
Choose the required value

4. Role
Choose the required value

5. Machine Group Id
Choose the required value

6. PASSWORD
Enter the account password carefully

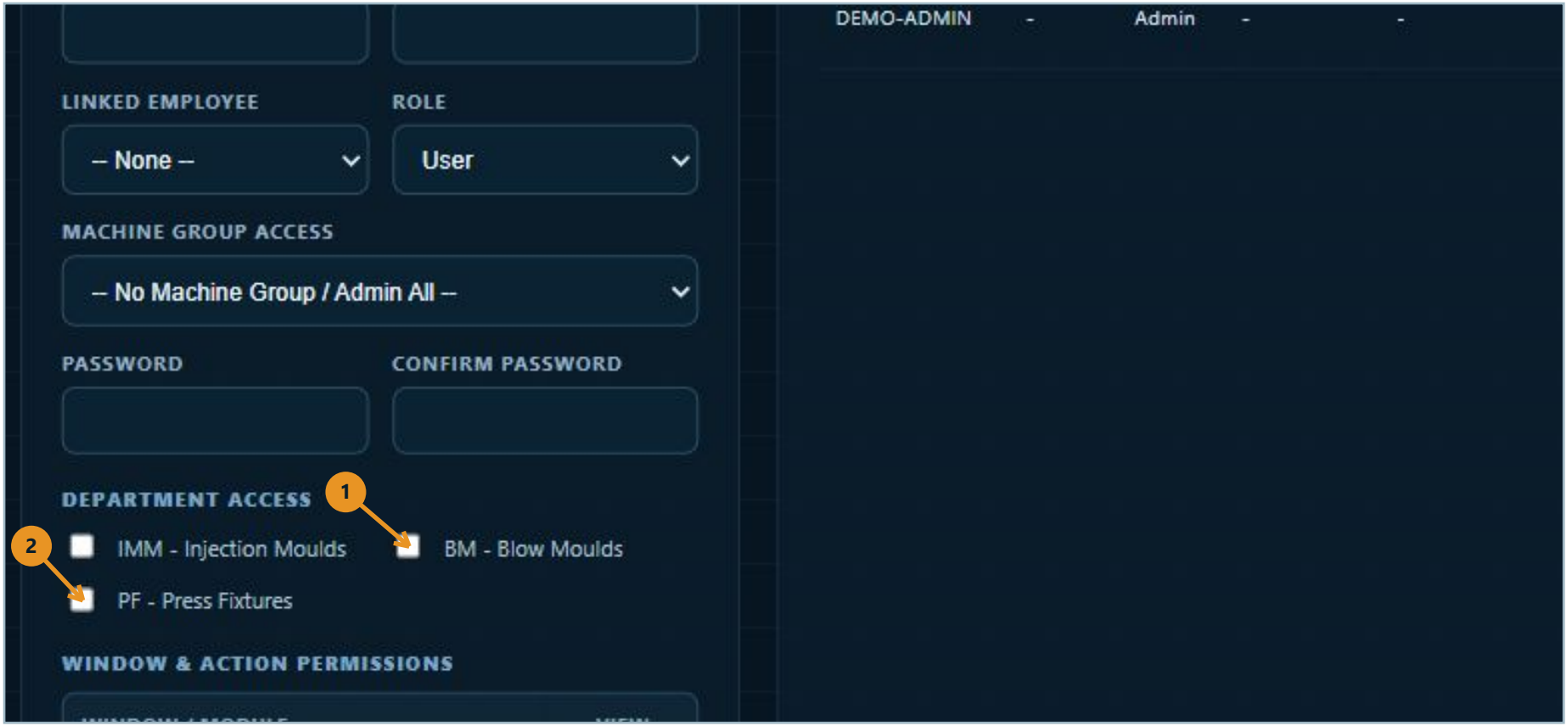
7. CONFIRM PASSWORD
Enter the account password carefully

8. IMM - Injection Moulds
Tick to enable this option; clear to disable it

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 04 • orange numbers point to the named controls



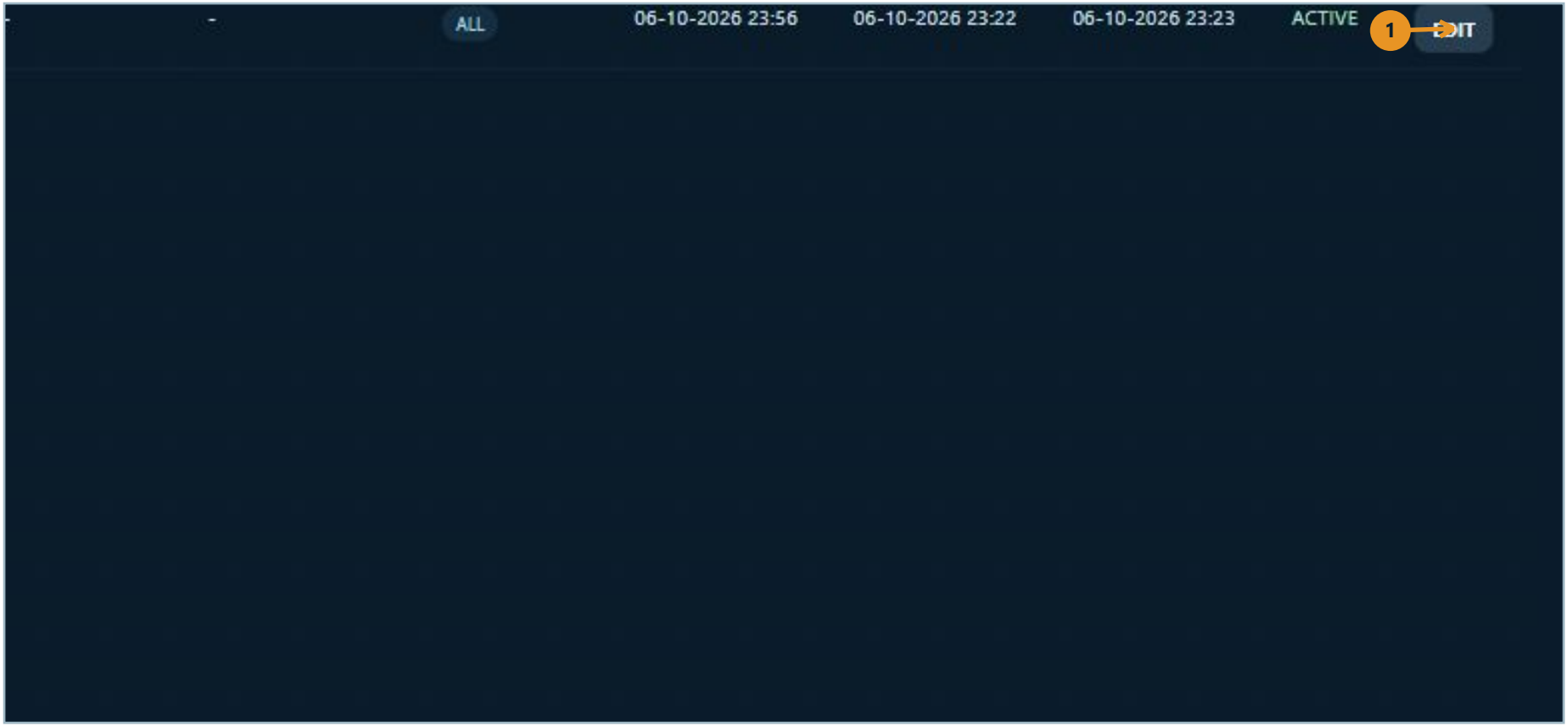
1. BM - Blow Moulds
Tick to enable this option; clear to disable it

2. PF - Press Fixtures
Tick to enable this option; clear to disable it

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 05 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 06 • orange numbers point to the named controls



1. Dashboard View
Grant this specific module/action only when the account is authorized

2. Dashboard Add / New
Grant this specific module/action only when the account is authorized

3. Dashboard Edit
Grant this specific module/action only when the account is authorized

4. Dashboard Delete
Grant this specific module/action only when the account is authorized

5. Dashboard Export Excel
Grant this specific module/action only when the account is authorized

6. Dashboard Export PDF
Grant this specific module/action only when the account is authorized

7. Daily Data Entry View
Grant this specific module/action only when the account is authorized

8. Daily Data Entry Add / New
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 07 • orange numbers point to the named controls



1. Daily Data Entry Edit
Grant this specific module/action only when the account is authorized

2. Daily Data Entry Delete
Grant this specific module/action only when the account is authorized

3. Daily Data Entry Export Excel
Grant this specific module/action only when the account is authorized

4. Daily Data Entry Export PDF
Grant this specific module/action only when the account is authorized

5. Process Planning View
Grant this specific module/action only when the account is authorized

6. Process Planning Add / New
Grant this specific module/action only when the account is authorized

7. Process Planning Edit
Grant this specific module/action only when the account is authorized

8. Process Planning Delete
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 08 • orange numbers point to the named controls



1. Process Planning Export Excel
Grant this specific module/action only when the account is authorized

2. Process Planning Export PDF
Grant this specific module/action only when the account is authorized

3. Machine Capacity View
Grant this specific module/action only when the account is authorized

4. Machine Capacity Add / New
Grant this specific module/action only when the account is authorized

5. Machine Capacity Edit
Grant this specific module/action only when the account is authorized

6. Machine Capacity Delete
Grant this specific module/action only when the account is authorized

7. Machine Capacity Export Excel
Grant this specific module/action only when the account is authorized

8. Machine Capacity Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 09 • orange numbers point to the named controls



1. Plan Vs Target View
Grant this specific module/action only when the account is authorized

2. Plan Vs Target Add / New
Grant this specific module/action only when the account is authorized

3. Plan Vs Target Edit
Grant this specific module/action only when the account is authorized

4. Plan Vs Target Delete
Grant this specific module/action only when the account is authorized

5. Plan Vs Target Export Excel
Grant this specific module/action only when the account is authorized

6. Plan Vs Target Export PDF
Grant this specific module/action only when the account is authorized

7. Completed Projects View
Grant this specific module/action only when the account is authorized

8. Completed Projects Add / New
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 10 • orange numbers point to the named controls



1. Completed Projects Edit
Grant this specific module/action only when the account is authorized

2. Completed Projects Delete
Grant this specific module/action only when the account is authorized

3. Completed Projects Export Excel
Grant this specific module/action only when the account is authorized

4. Completed Projects Export PDF
Grant this specific module/action only when the account is authorized

5. Project Delay / Target Alert View
Grant this specific module/action only when the account is authorized

6. Project Delay / Target Alert Add / New
Grant this specific module/action only when the account is authorized

7. Project Delay / Target Alert Edit
Grant this specific module/action only when the account is authorized

8. Project Delay / Target Alert Delete
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 11 • orange numbers point to the named controls



1. Project Delay / Target Alert Export Excel
Grant this specific module/action only when the account is authorized

2. Project Delay / Target Alert Export PDF
Grant this specific module/action only when the account is authorized

3. Daily Management Report View
Grant this specific module/action only when the account is authorized

4. Daily Management Report Add / New
Grant this specific module/action only when the account is authorized

5. Daily Management Report Edit
Grant this specific module/action only when the account is authorized

6. Daily Management Report Delete
Grant this specific module/action only when the account is authorized

7. Daily Management Report Export Excel
Grant this specific module/action only when the account is authorized

8. Daily Management Report Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 12 • orange numbers point to the named controls



1. Project Tracker View
Grant this specific module/action only when the account is authorized

2. Project Tracker Add / New
Grant this specific module/action only when the account is authorized

3. Project Tracker Edit
Grant this specific module/action only when the account is authorized

4. Project Tracker Delete
Grant this specific module/action only when the account is authorized

5. Project Tracker Export Excel
Grant this specific module/action only when the account is authorized

6. Project Tracker Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 13 • orange numbers point to the named controls



1. Dashboard Export PDF
Grant this specific module/action only when the account is authorized

2. Daily Data Entry Export PDF
Grant this specific module/action only when the account is authorized

3. Process Planning Export PDF
Grant this specific module/action only when the account is authorized

4. Machine Capacity Export PDF
Grant this specific module/action only when the account is authorized

5. Plan Vs Target Export PDF
Grant this specific module/action only when the account is authorized

6. Completed Projects Export PDF
Grant this specific module/action only when the account is authorized

7. Project Delay / Target Alert Export PDF
Grant this specific module/action only when the account is authorized

8. Daily Management Report Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 14 • orange numbers point to the named controls

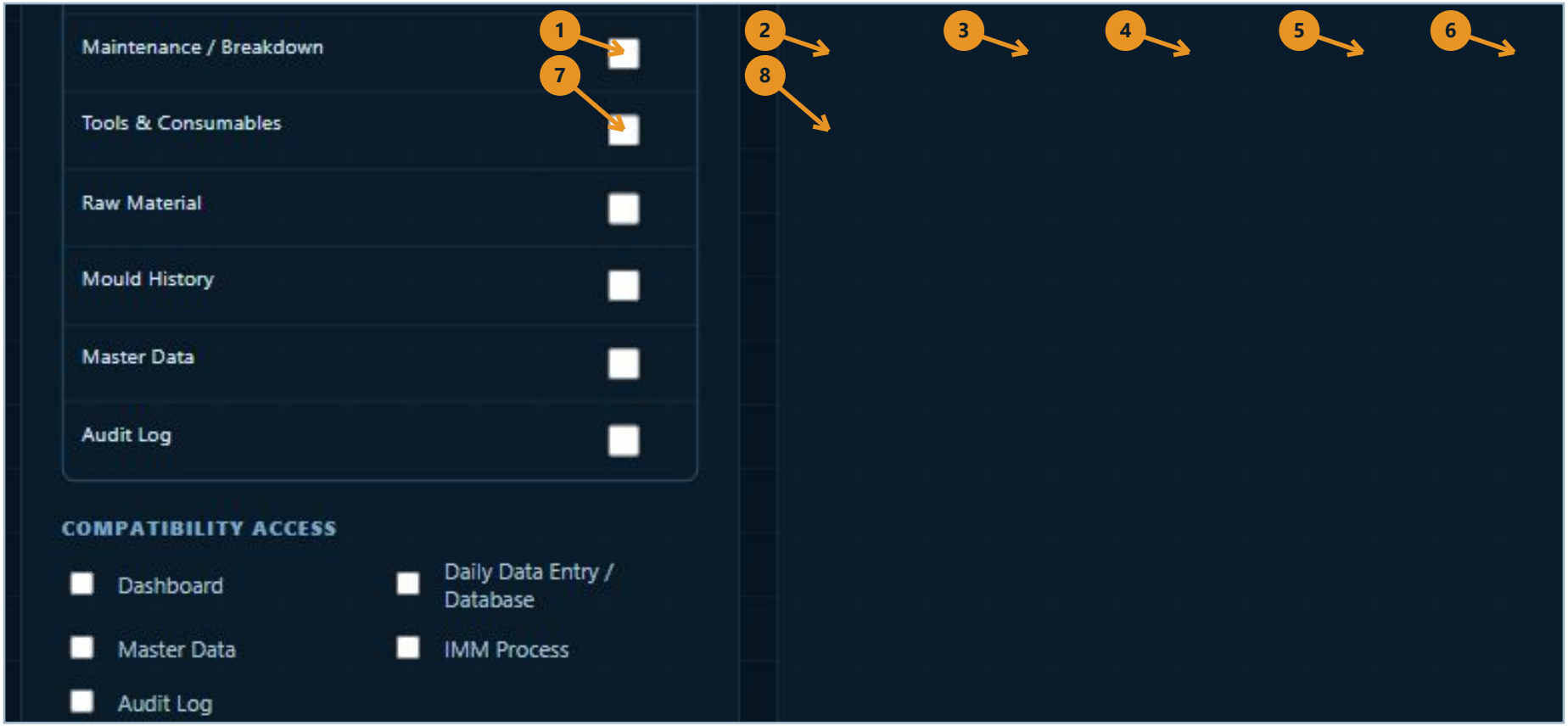


1. Project Tracker Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 15 • orange numbers point to the named controls



1. Maintenance / Breakdown View
Grant this specific module/action only when the account is authorized

2. Maintenance / Breakdown Add / New
Grant this specific module/action only when the account is authorized

3. Maintenance / Breakdown Edit
Grant this specific module/action only when the account is authorized

4. Maintenance / Breakdown Delete
Grant this specific module/action only when the account is authorized

5. Maintenance / Breakdown Export Excel
Grant this specific module/action only when the account is authorized

6. Maintenance / Breakdown Export PDF
Grant this specific module/action only when the account is authorized

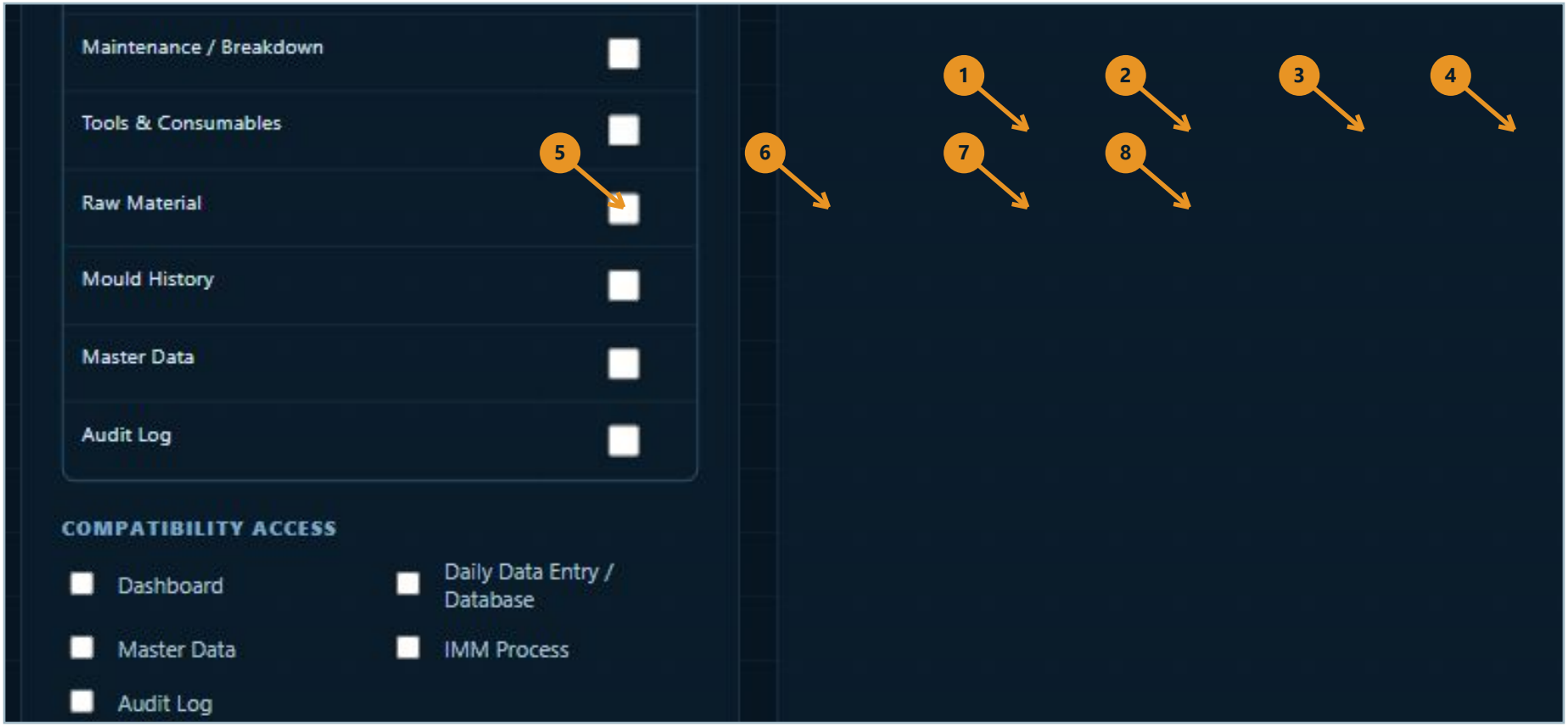
7. Tools & Consumables View
Grant this specific module/action only when the account is authorized

8. Tools & Consumables Add / New
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 16 • orange numbers point to the named controls



1. Tools & Consumables Edit
Grant this specific module/action only when the account is authorized

2. Tools & Consumables Delete
Grant this specific module/action only when the account is authorized

3. Tools & Consumables Export Excel
Grant this specific module/action only when the account is authorized

4. Tools & Consumables Export PDF
Grant this specific module/action only when the account is authorized

5. Raw Material View
Grant this specific module/action only when the account is authorized

6. Raw Material Add / New
Grant this specific module/action only when the account is authorized

7. Raw Material Edit
Grant this specific module/action only when the account is authorized

8. Raw Material Delete
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 17 • orange numbers point to the named controls



1. Raw Material Export Excel
Grant this specific module/action only when the account is authorized

2. Raw Material Export PDF
Grant this specific module/action only when the account is authorized

3. Mould History View
Grant this specific module/action only when the account is authorized

4. Mould History Add / New
Grant this specific module/action only when the account is authorized

5. Mould History Edit
Grant this specific module/action only when the account is authorized

6. Mould History Delete
Grant this specific module/action only when the account is authorized

7. Mould History Export Excel
Grant this specific module/action only when the account is authorized

8. Mould History Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 18 • orange numbers point to the named controls



1. Master Data View
Grant this specific module/action only when the account is authorized

2. Master Data Add / New
Grant this specific module/action only when the account is authorized

3. Master Data Edit
Grant this specific module/action only when the account is authorized

4. Master Data Delete
Grant this specific module/action only when the account is authorized

5. Master Data Export Excel
Grant this specific module/action only when the account is authorized

6. Master Data Export PDF
Grant this specific module/action only when the account is authorized

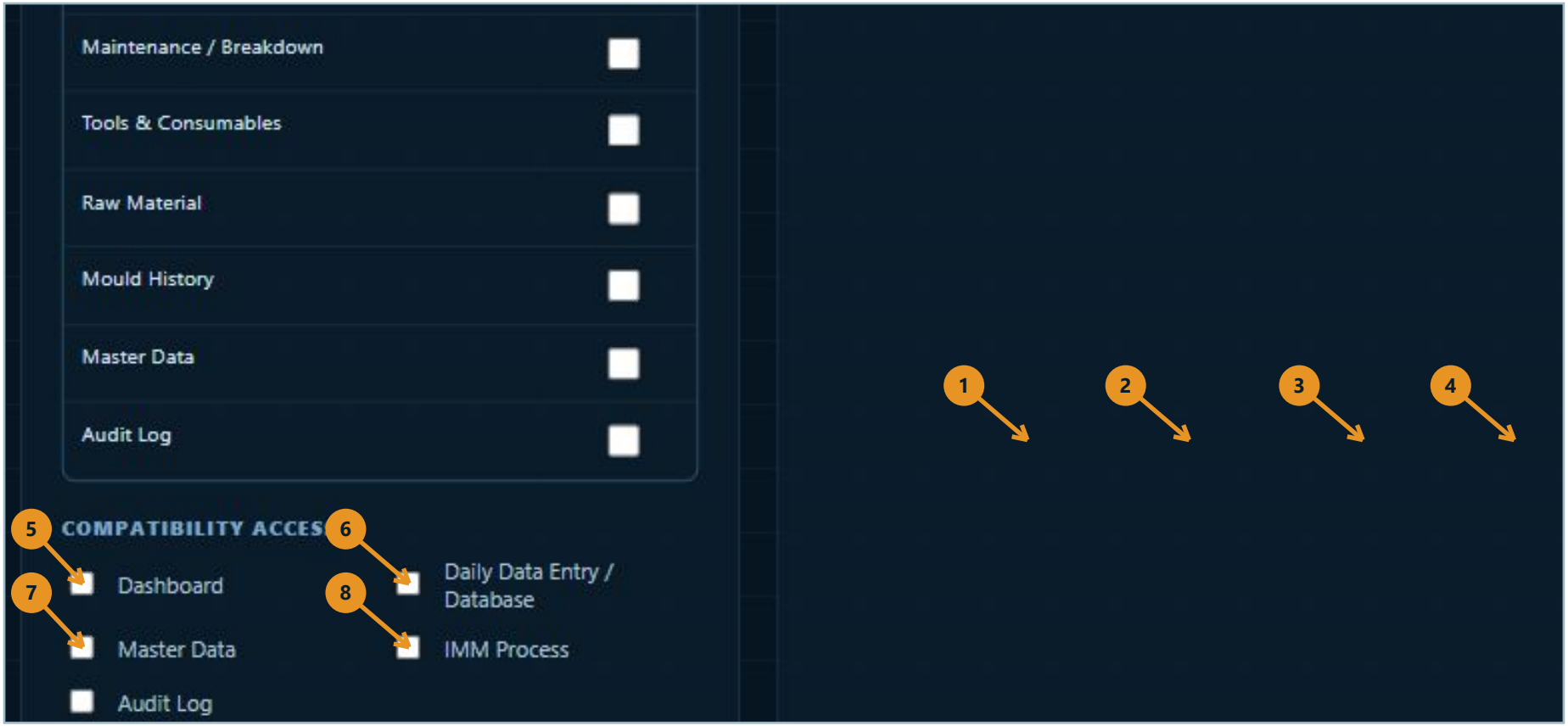
7. Audit Log View
Grant this specific module/action only when the account is authorized

8. Audit Log Add / New
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 19 • orange numbers point to the named controls



1. Audit Log Edit
Grant this specific module/action only when the account is authorized

2. Audit Log Delete
Grant this specific module/action only when the account is authorized

3. Audit Log Export Excel
Grant this specific module/action only when the account is authorized

4. Audit Log Export PDF
Grant this specific module/action only when the account is authorized

5. Dashboard
Tick to enable this option; clear to disable it

6. Daily Data Entry / Database
Tick to enable this option; clear to disable it

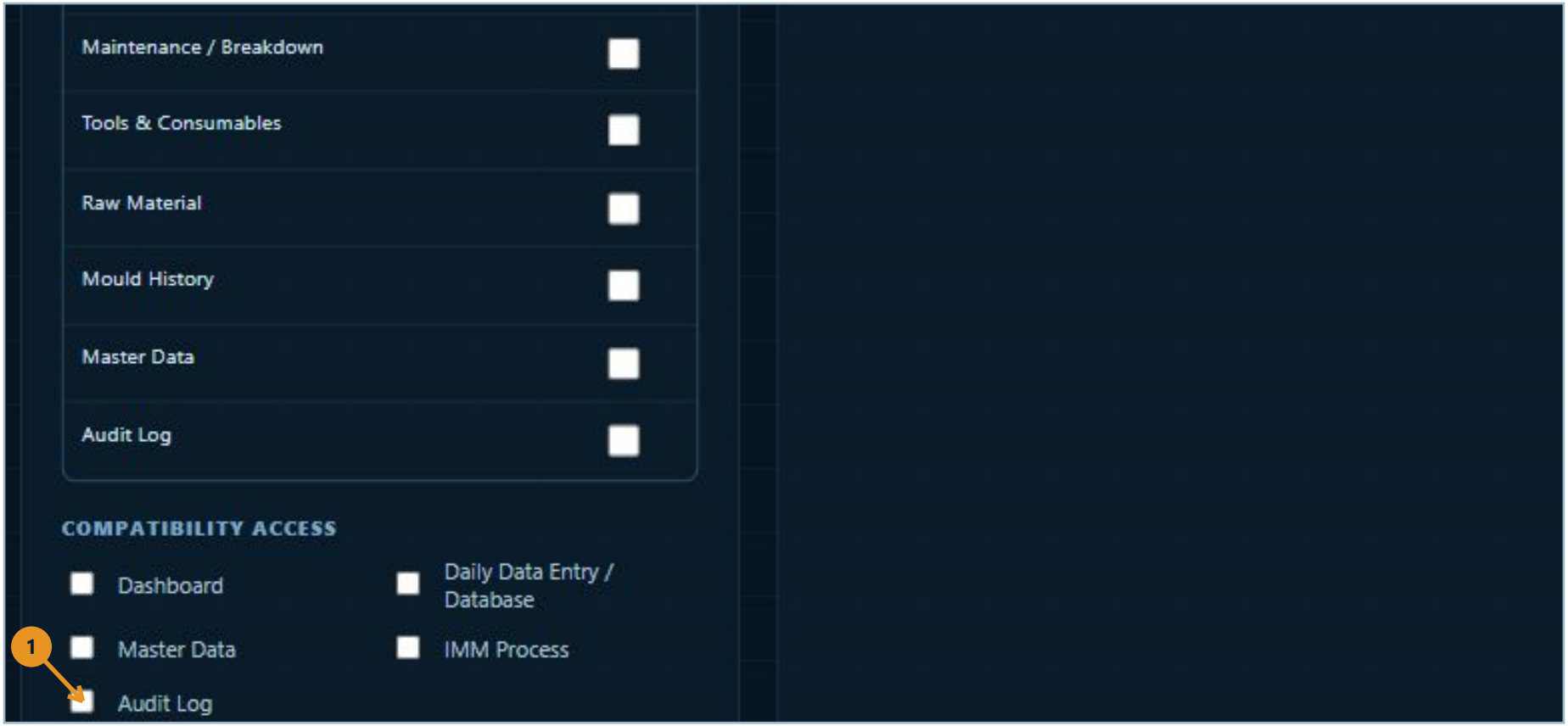
7. Master Data
Tick to enable this option; clear to disable it

8. IMM Process
Tick to enable this option; clear to disable it

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 20 • orange numbers point to the named controls



1. Audit Log
Tick to enable this option; clear to disable it

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 21 • orange numbers point to the named controls



1. Maintenance / Breakdown Export PDF
Grant this specific module/action only when the account is authorized

2. Tools & Consumables Export PDF
Grant this specific module/action only when the account is authorized

3. Raw Material Export PDF
Grant this specific module/action only when the account is authorized

4. Mould History Export PDF
Grant this specific module/action only when the account is authorized

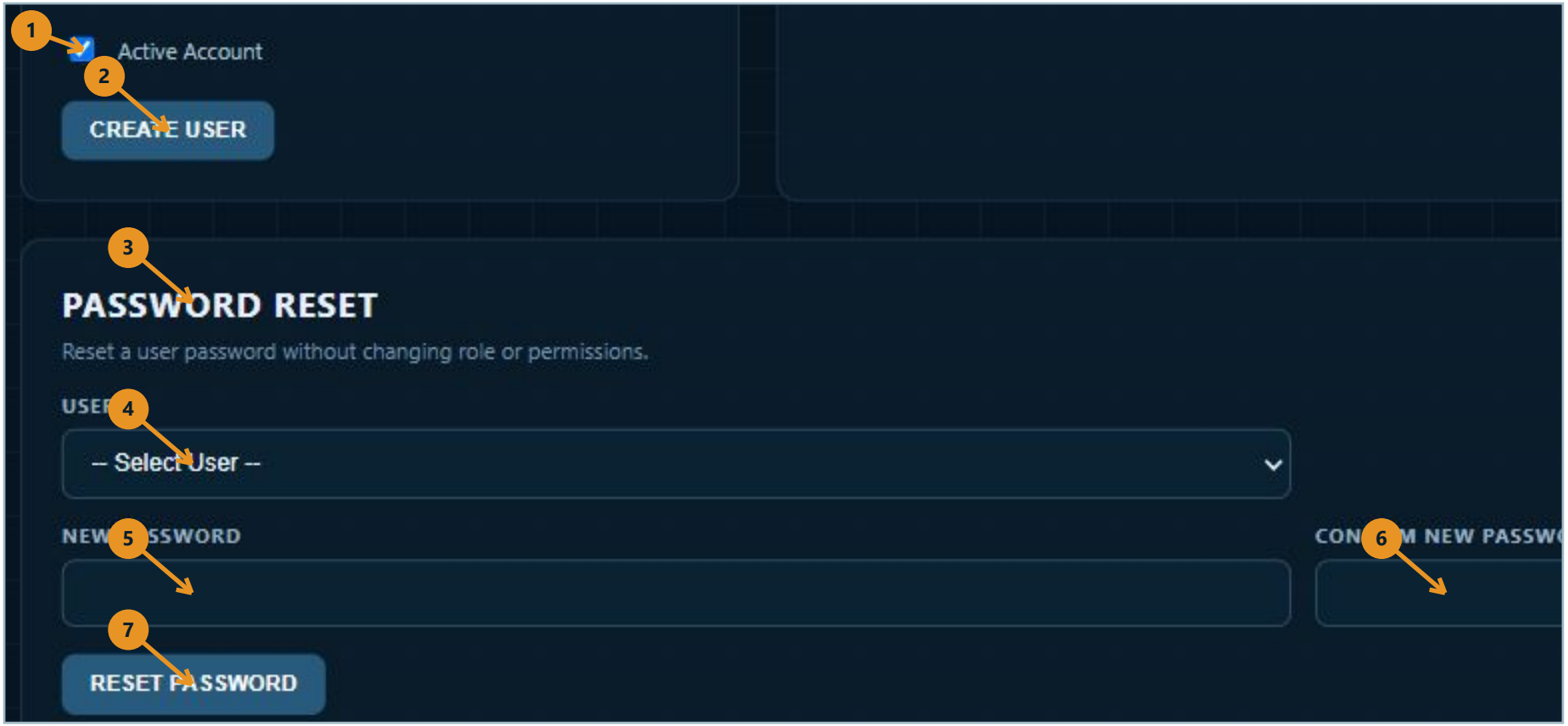
5. Master Data Export PDF
Grant this specific module/action only when the account is authorized

6. Audit Log Export PDF
Grant this specific module/action only when the account is authorized

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 22 • orange numbers point to the named controls



1. Active Account
Tick to enable this option; clear to disable it

2. CREATE USER
Commit the reviewed fields for this form

3. PASSWORD RESET
Enter or review this value as labeled

4. User Id
Choose the required value

5. NEW PASSWORD
Enter the account password carefully

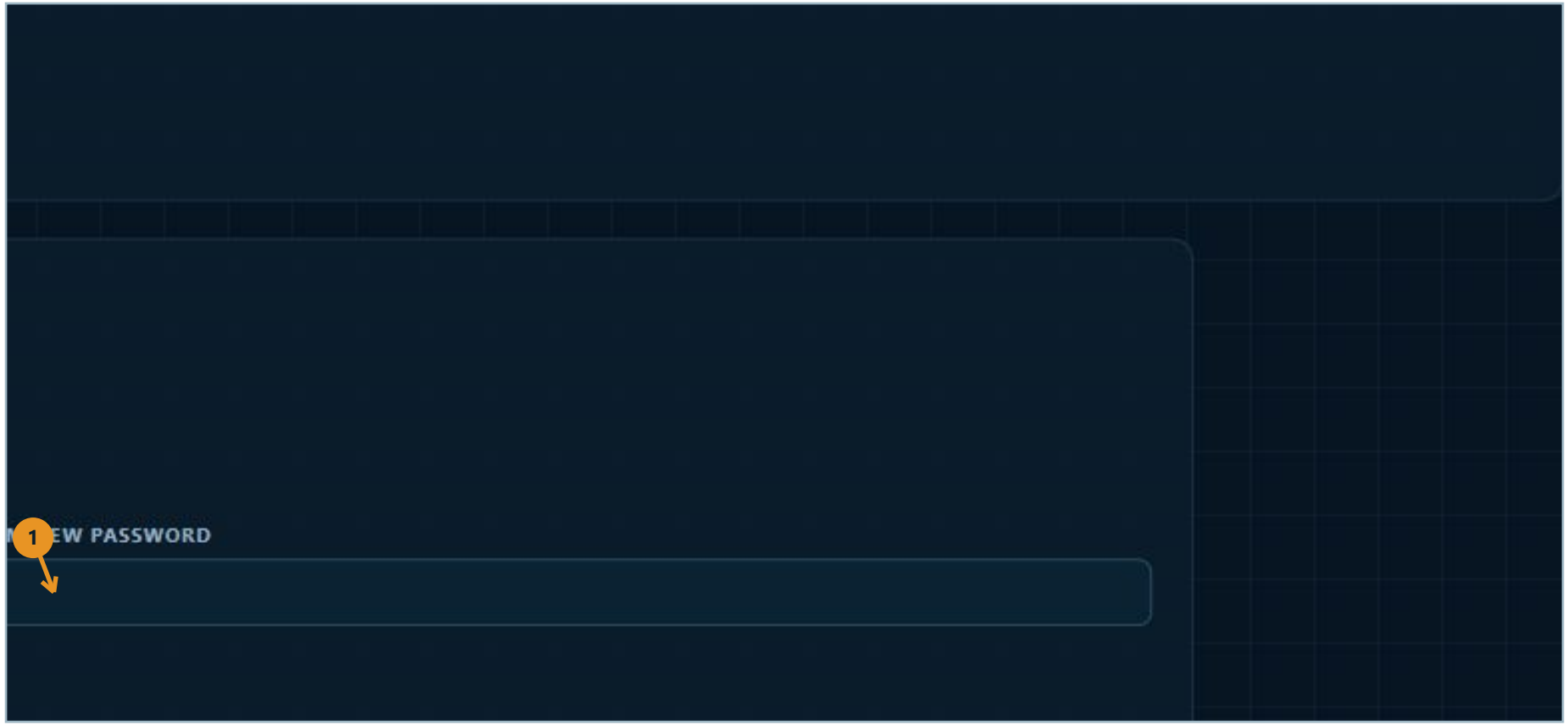
6. CONFIRM NEW PASSWORD
Enter the account password carefully

7. RESET PASSWORD
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Illustrated detail 23 • orange numbers point to the named controls



1. CONFIRM NEW PASSWORD
Enter the account password carefully

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

13 Users: account creation and permission matrix

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
USER MANAGEMENT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
ADD USER	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
LOGIN ID / EMPLOYEE ID	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FULL NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Employee Id	Choose the required value. Available choices: -- None --. The displayed records follow this screen's scope and account access.
Role	Choose the required value. Available choices: Admin; User; User1; User2. The displayed records follow this screen's scope and account access.
Machine Group Id	Choose the required value. Available choices: -- No Machine Group / Admin All --; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
CONFIRM PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
IMM - Injection Moulds	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
BM - Blow Moulds	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
PF - Press Fixtures	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Dashboard View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Dashboard Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Dashboard Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Dashboard Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Dashboard Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Dashboard Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Data Entry Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Process Planning Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Machine Capacity View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Machine Capacity Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Machine Capacity Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Machine Capacity Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Machine Capacity Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Machine Capacity Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Plan Vs Target Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Completed Projects View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Completed Projects Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Completed Projects Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Completed Projects Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Completed Projects Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Completed Projects Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Delay / Target Alert Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Daily Management Report Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Tracker View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Tracker Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Project Tracker Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Tracker Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Tracker Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Project Tracker Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Maintenance / Breakdown Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Tools & Consumables Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Raw Material View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Raw Material Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Raw Material Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Raw Material Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Raw Material Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Raw Material Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Mould History Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Master Data View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Master Data Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Master Data Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Master Data Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.

Master Data Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Master Data Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log View	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log Add / New	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log Edit	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log Delete	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log Export Excel	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Audit Log Export PDF	Grant this specific module/action only when the account is authorized. Clear it to withhold that action; save the account changes.
Dashboard	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Daily Data Entry / Database	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Master Data	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
IMM Process	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Audit Log	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Active Account	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
CREATE USER	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
USER ACCOUNTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
PASSWORD RESET	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
User Id	Choose the required value. Available choices: -- Select User --. The displayed records follow this screen's scope and account access.
NEW PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
CONFIRM NEW PASSWORD	Enter the account password carefully. Keep credentials private; Admin resets forgotten user passwords.
RESET PASSWORD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

14 Process planning: create a plan and allocate parts

Workflow • read before using the illustrated controls

1. Open IMM, BM or PF Process for the intended department. Choose the Project No.; the Project Name follows that project.
2. Priority defaults to the existing project priority when the project already has one. For a new project it defaults to the current last priority plus one. Changing project updates the suggested priority.
3. Find a part in PROJECT PARTS. Drag it into NEW PROCESS PLAN or click its + control. Use + ADD for a new part name.
4. Fill each attached operation, allocate the machine/group and review the hours and booking. Add more operations as required.
5. Choose SAVE PLAN only after reviewing all operations. CLEAR discards the draft. CSV import loads rows into the draft for review; it does not replace the final Save Plan step.
6. Use the saved-plan date, project, group, machine, part and status filters, then SHOW PLANNING. Use FILES for operation attachments and EDIT for an existing plan.

Worked example

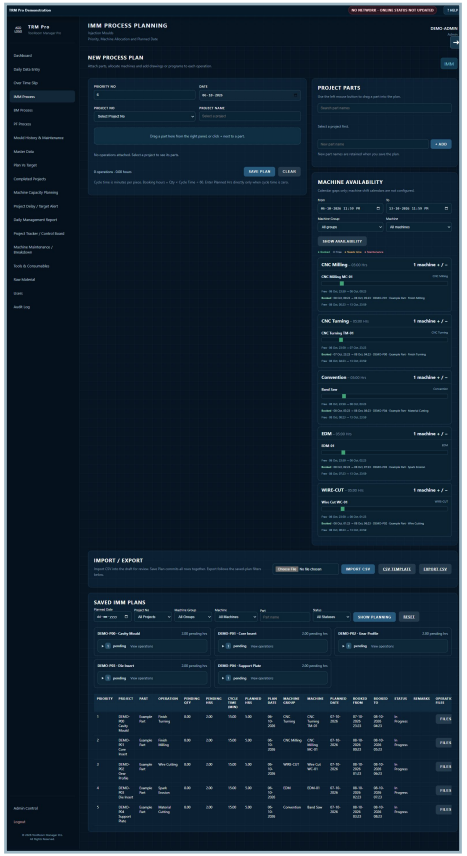
Quantity 20 × cycle time 15 minutes ÷ 60 = 5 planned hours. The small “05:00 Hrs” beside a group indicates total planned time.

Practical notes

In Progress is the active planning state. Hold, Not Started, Completed and Cancelled are excluded from active planning reservations under the current planning behavior. Review downstream dates after changing status or inserting urgent work. Different department process windows use the same workflow.

14 Process planning: create a plan and allocate parts

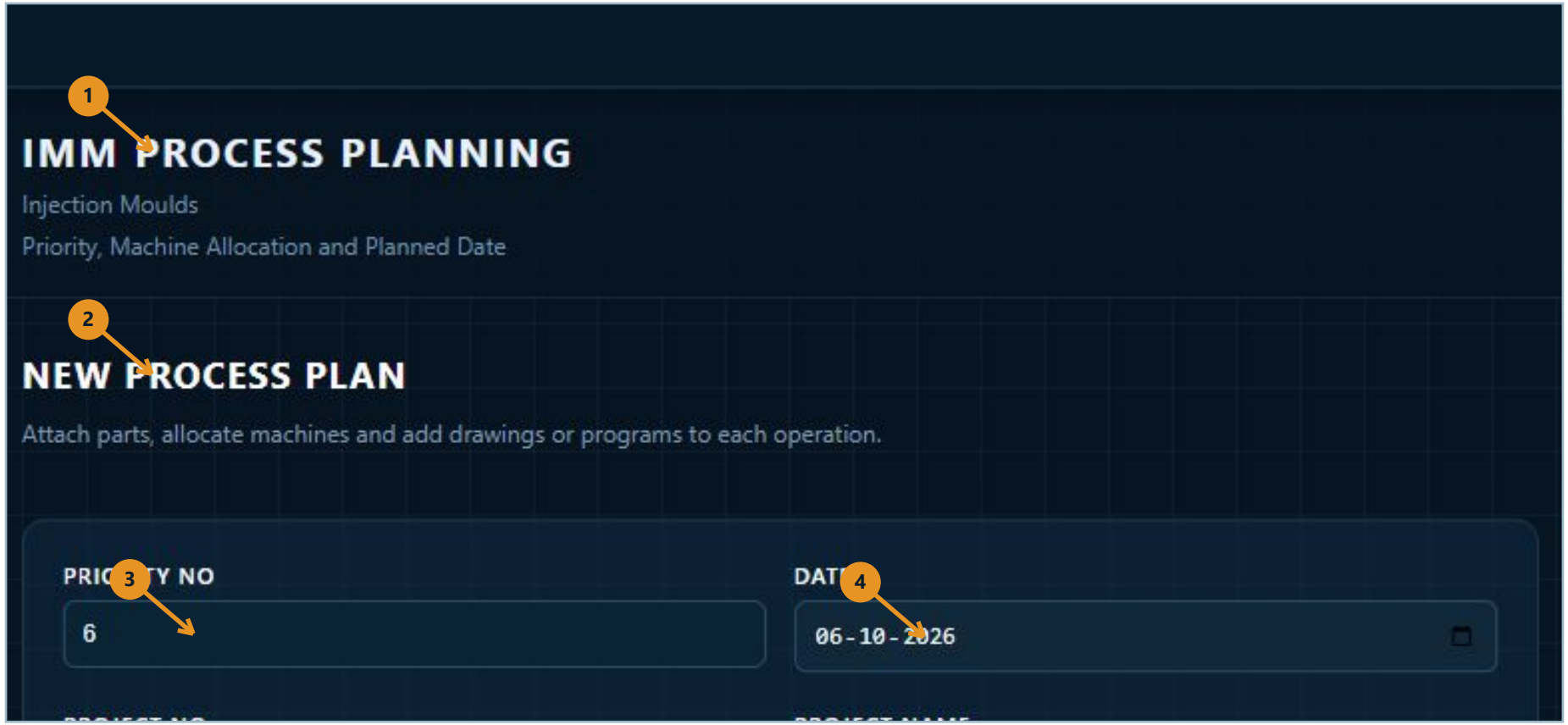
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 01 • orange numbers point to the named controls



1. IMM PROCESS PLANNING
Enter or review this value as labeled

2. NEW PROCESS PLAN
Enter or review this value as labeled

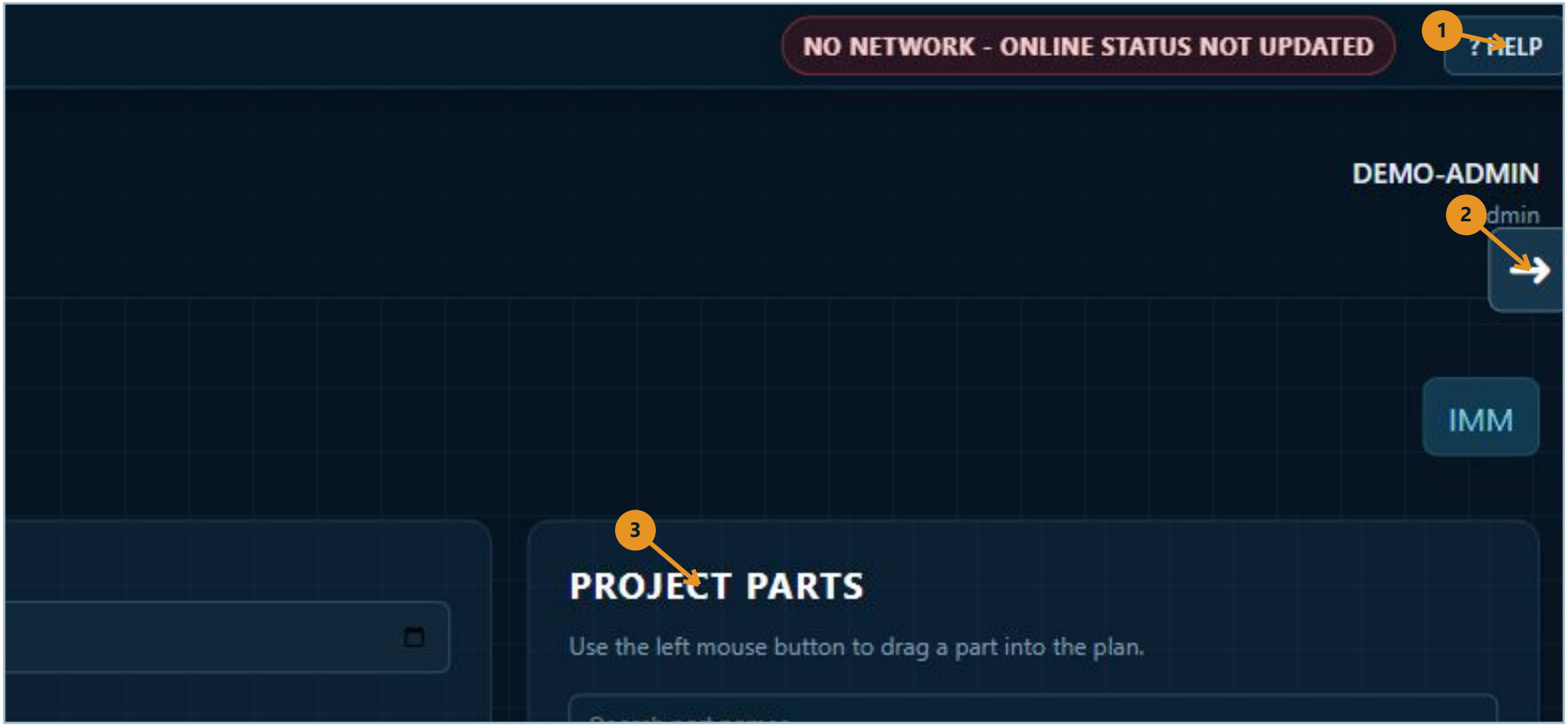
3. PRIORITY NO
Enter the numeric quantity/time required by the label

4. DATE
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

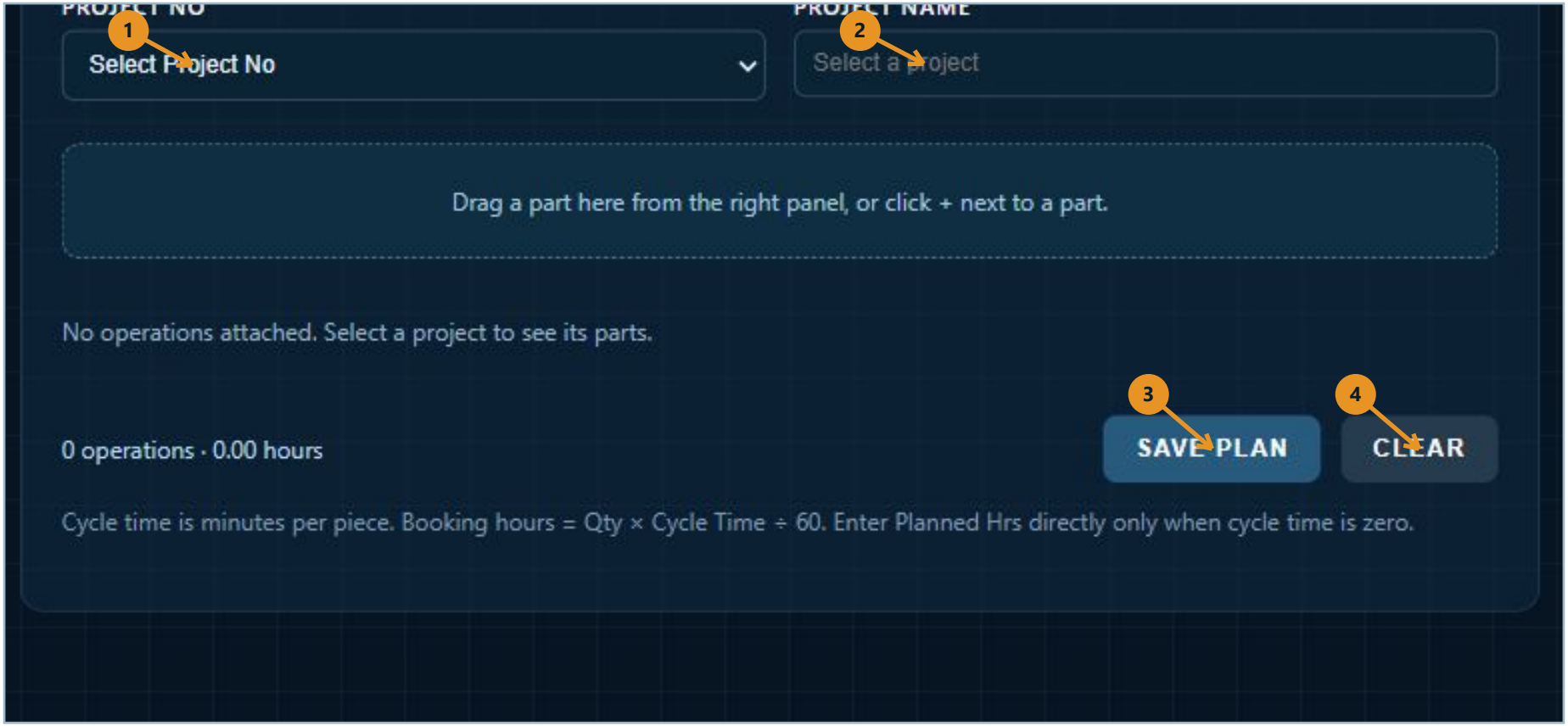
2. Expand Process Planning
Use this named action/tab for the workflow described in this chapter

3. PROJECT PARTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 03 • orange numbers point to the named controls



1. PROJECT NO
Choose the required value

2. PROJECT NAME
Enter or review this value as labeled

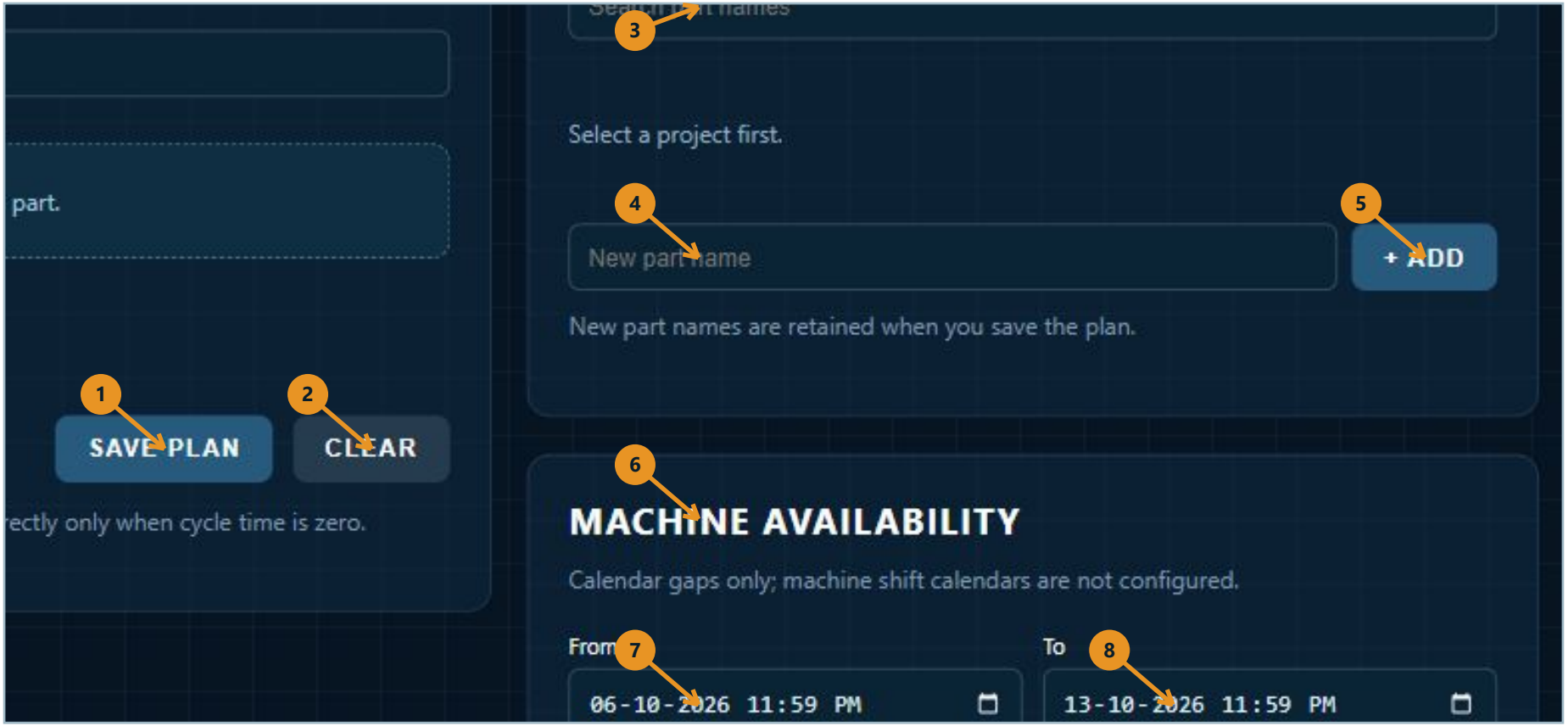
3. SAVE PLAN
Commit the reviewed fields for this form

4. CLEAR
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 04 • orange numbers point to the named controls



1. SAVE PLAN
Commit the reviewed fields for this form

2. CLEAR
Clear the current draft/checks or reset the filter as indicated

3. Search part names
Enter or review this value as labeled

4. New part name
Enter or review this value as labeled

5. + ADD
Use this named action/tab for the workflow described in this chapter

6. MACHINE AVAILABILITY
Enter or review this value as labeled

7. From
Select the actual reference date/time for this record or report

8. To
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 05 • orange numbers point to the named controls



1. Machine Group All groups CNC Milling CNC Turning Convention
Choose the required value

2. Machine All machines CNC Milling MC-01 CNC Turning TM-01 Ban
Choose the required value

3. SHOW AVAILABILITY
Apply the selected filters and refresh the displayed results

4. CNC Milling – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 06 • orange numbers point to the named controls



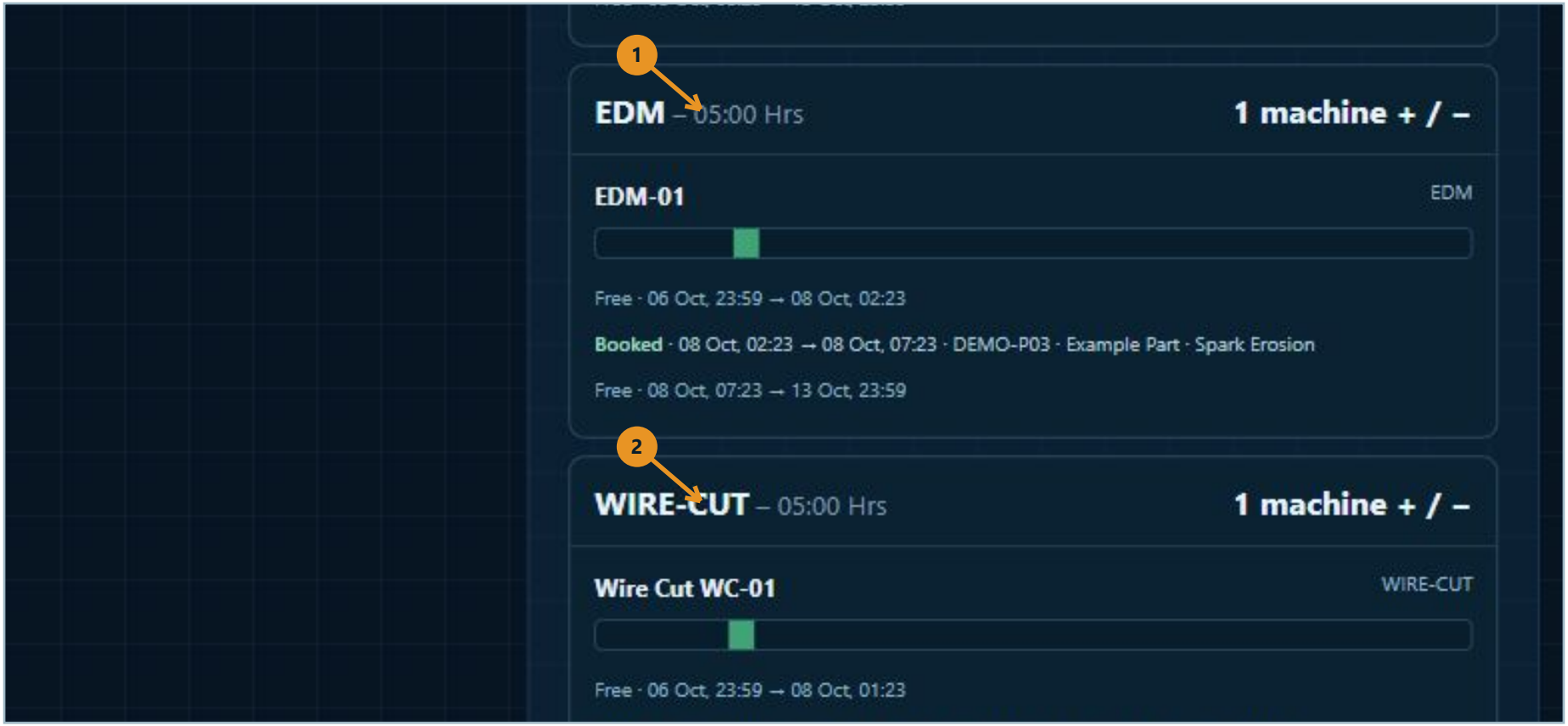
1. CNC Turning – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. Convention – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 07 • orange numbers point to the named controls



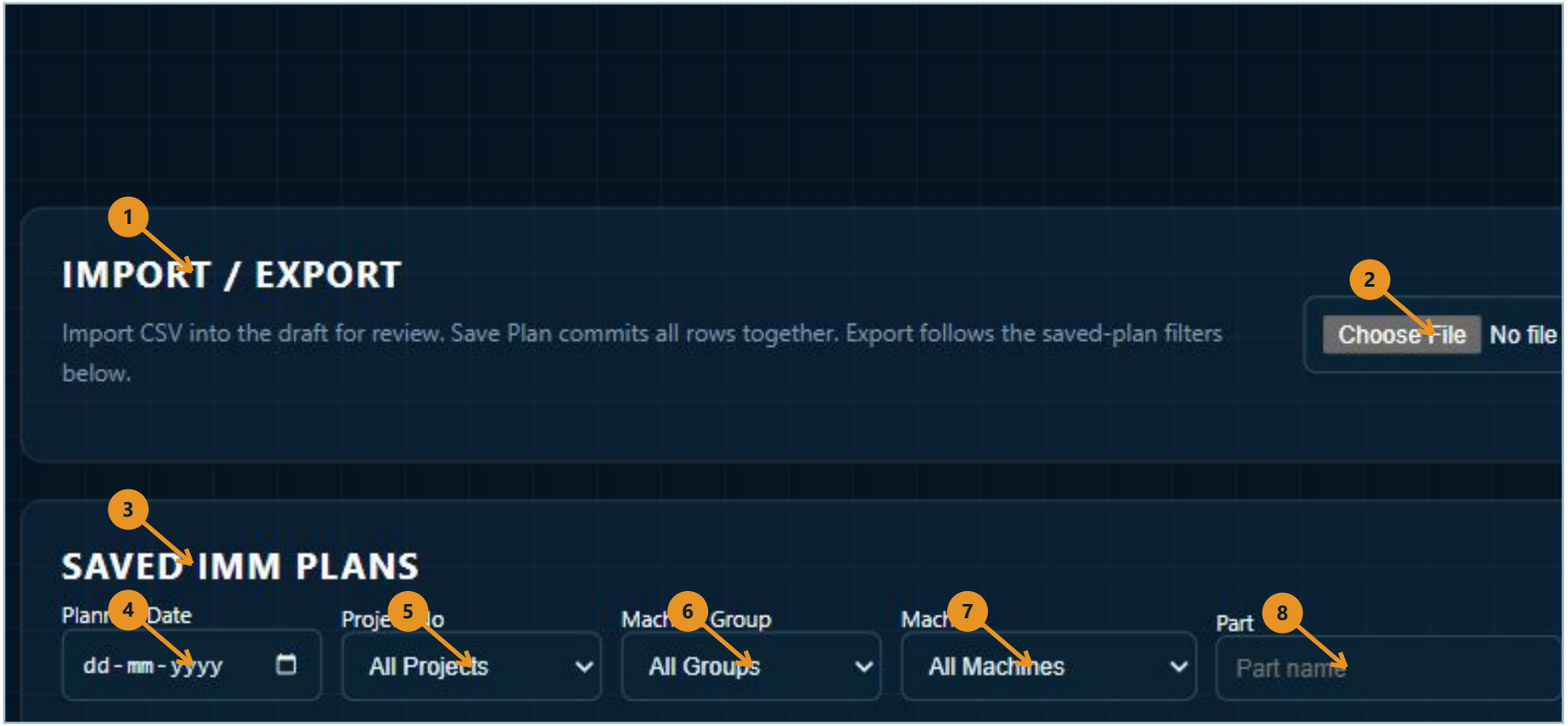
1. EDM – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. WIRE-CUT – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 08 • orange numbers point to the named controls



1. IMPORT / EXPORT
Enter or review this value as labeled

2. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

3. SAVED IMM PLANS
Enter or review this value as labeled

4. Planned Date
Select the actual reference date/time for this record or report

5. Project Filter
Choose the required value

6. Group Filter
Choose the required value

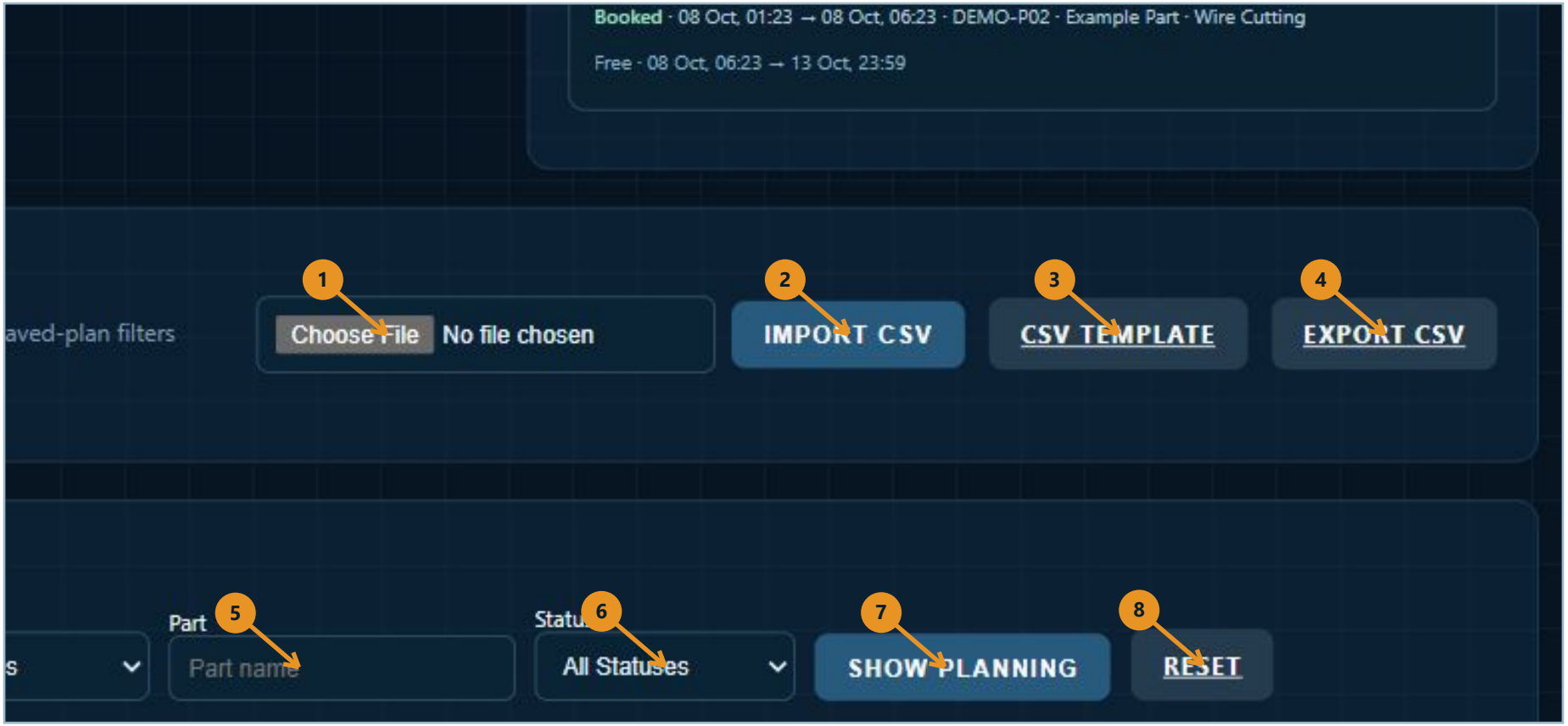
7. Machine Filter
Choose the required value

8. Part
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 09 • orange numbers point to the named controls



1. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. IMPORT CSV
Use this named action/tab for the workflow described in this chapter

3. CSV TEMPLATE
Use this named action/tab for the workflow described in this chapter

4. EXPORT CSV
Export the current report/stock scope in the indicated format

5. Part
Enter or review this value as labeled

6. Status Filter
Choose the required value

7. SHOW PLANNING
Apply the selected filters and refresh the displayed results

8. RESET
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 10 • orange numbers point to the named controls



1. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

2. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

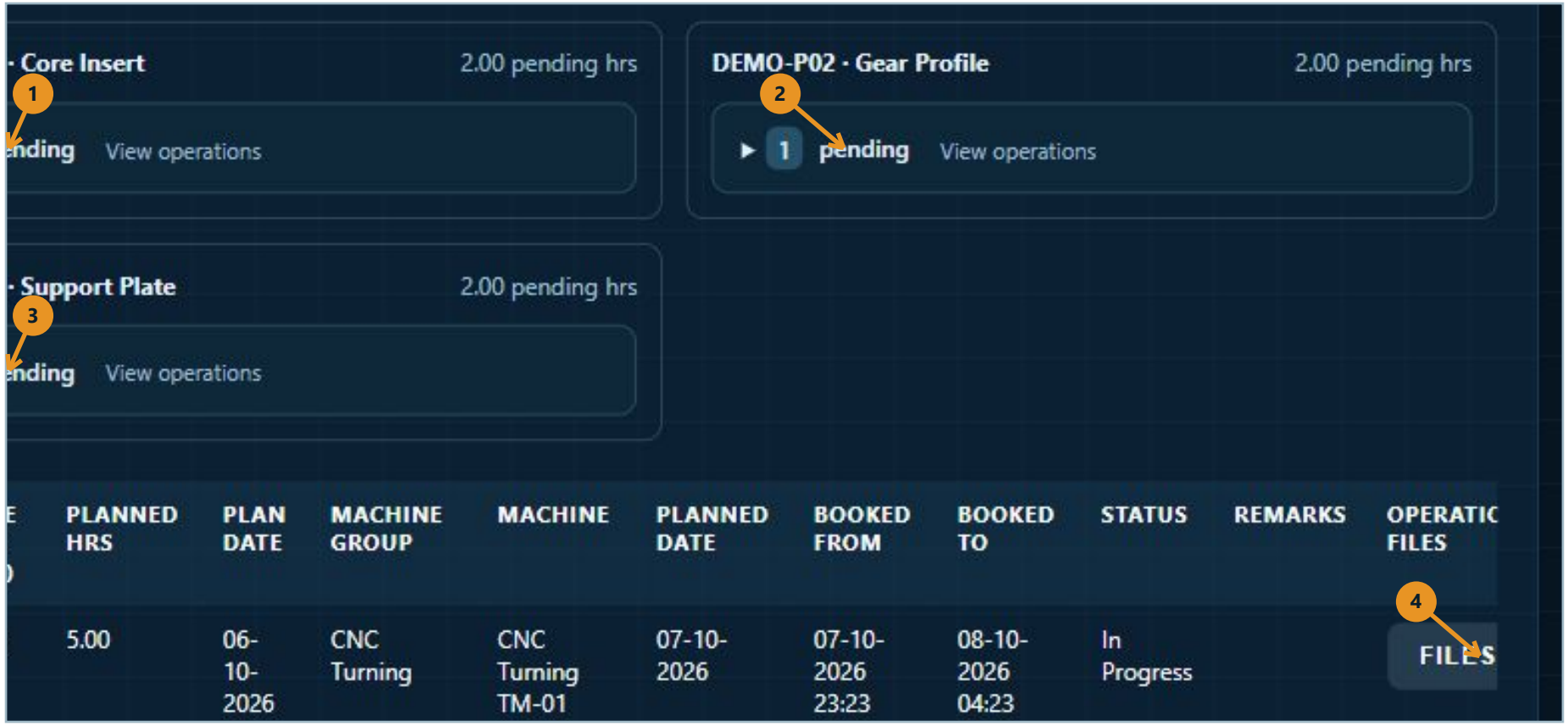
3. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

4. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 11 • orange numbers point to the named controls



1. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

2. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

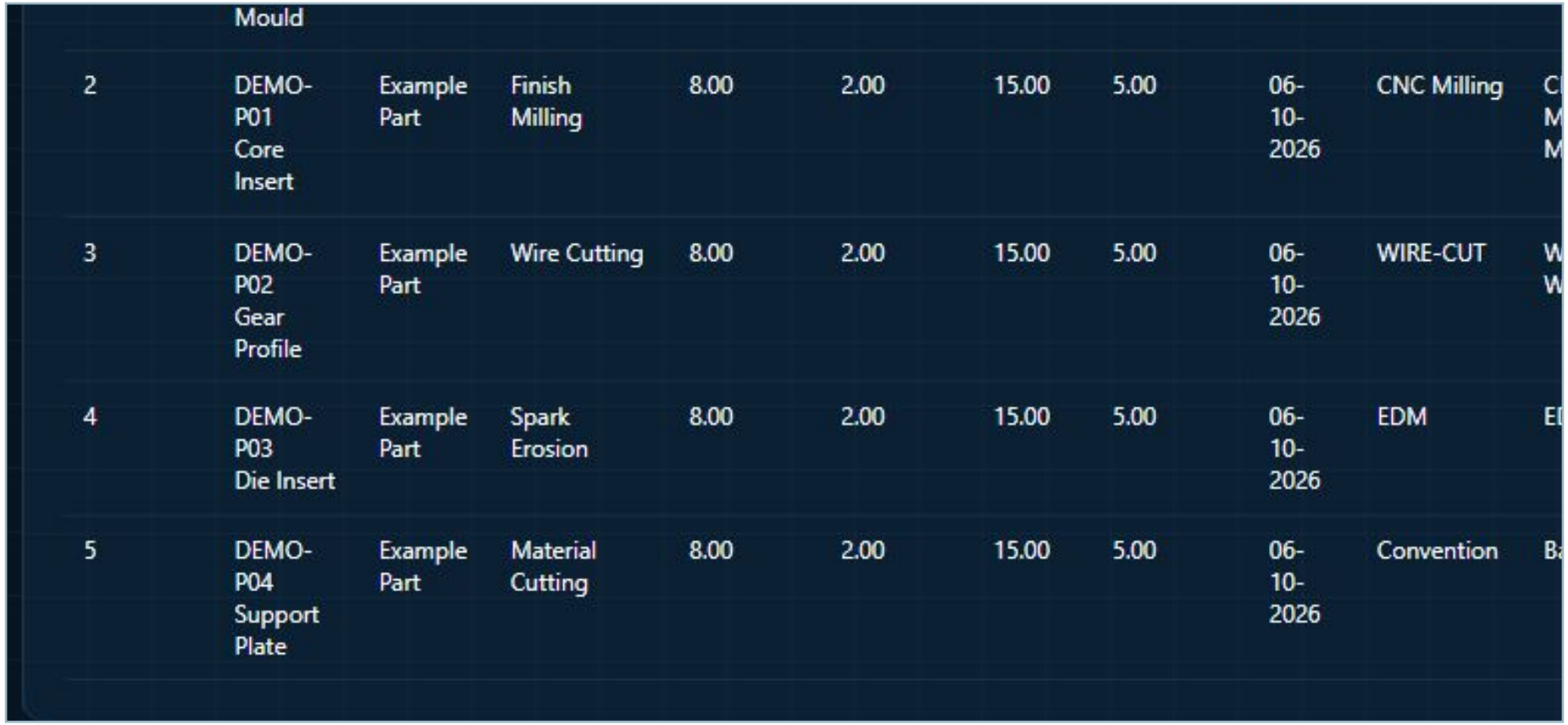
3. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

4. FILES (6)
Open the operation file list for PDF, CAD and NC attachments.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 12 • orange numbers point to the named controls

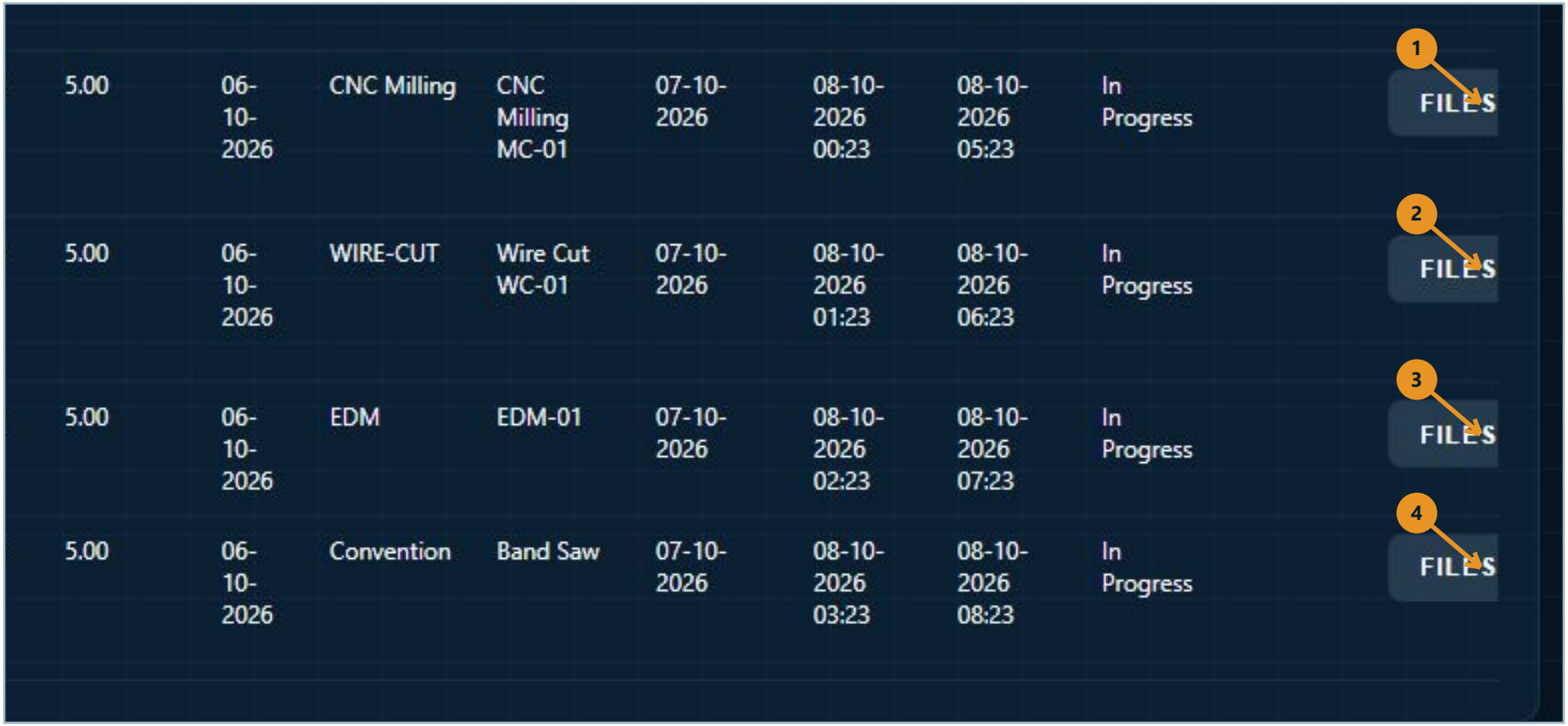


	Mould									
2	DEMO-P01 Core Insert	Example Part	Finish Milling	8.00	2.00	15.00	5.00	06-10-2026	CNC Milling	C M M
3	DEMO-P02 Gear Profile	Example Part	Wire Cutting	8.00	2.00	15.00	5.00	06-10-2026	WIRE-CUT	W W
4	DEMO-P03 Die Insert	Example Part	Spark Erosion	8.00	2.00	15.00	5.00	06-10-2026	EDM	E
5	DEMO-P04 Support Plate	Example Part	Material Cutting	8.00	2.00	15.00	5.00	06-10-2026	Convention	B

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

14 Process planning: create a plan and allocate parts

Illustrated detail 13 • orange numbers point to the named controls



1. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

2. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

3. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

4. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
IMM PROCESS PLANNING	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Expand Process Planning	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEW PROCESS PLAN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PRIORITY NO	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
PROJECT NO	Choose the required value. Available choices: Select Project No. The displayed records follow this screen's scope and account access.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SAVE PLAN	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
CLEAR	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
PROJECT PARTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Search part names	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
New part name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
+ ADD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINE AVAILABILITY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
From	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.

To	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Machine Group All groups CNC Milling CNC Turning Convention EDM Store Keeper WIRE-CUT	Choose the required value. Available choices: All groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine All machines CNC Milling MC-01 CNC Turning TM-01 Band Saw EDM-01 Wire Cut WC-01	Choose the required value. Available choices: All machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
SHOW AVAILABILITY	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
CNC Milling – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CNC Turning – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Convention – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDM – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
WIRE-CUT – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
IMPORT / EXPORT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Process plan CSV	Choose the appropriate file from this PC, then use the corresponding upload/add action.
IMPORT CSV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CSV TEMPLATE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EXPORT CSV	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

SAVED IMM PLANS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Planned Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Project Filter	Choose the required value. Available choices: All Projects. The displayed records follow this screen's scope and account access.
Group Filter	Choose the required value. Available choices: All Groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine Filter	Choose the required value. Available choices: All Machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
Part	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Status Filter	Choose the required value. Available choices: All Statuses; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen's scope and account access.
SHOW PLANNING	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
RESET	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
1 pending View operations	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
FILES (6)	Open the operation file list for PDF, CAD and NC attachments.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DELETE	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.
FILES (0)	Open the operation file list for PDF, CAD and NC attachments.

15 Process planning: every operation field

Workflow • read before using the illustrated controls

1. Set the operation name, quantity and cycle time in minutes per piece. Select Machine Group and Machine.
2. Set the planned date/start time and review the calculated booking hours. Enter planned hours directly only when cycle time is zero.
3. Select the status. Tick Unexpected / urgent plan when this is an emergency insertion that must carry affected machine work forward.
4. Enter remarks explaining the emergency or special instructions. Review affected bookings and dashboard/report indicators after saving.
5. Use Remove on an unwanted draft operation before Save Plan. Add drawings/programs to the saved operation through FILES.

Worked example

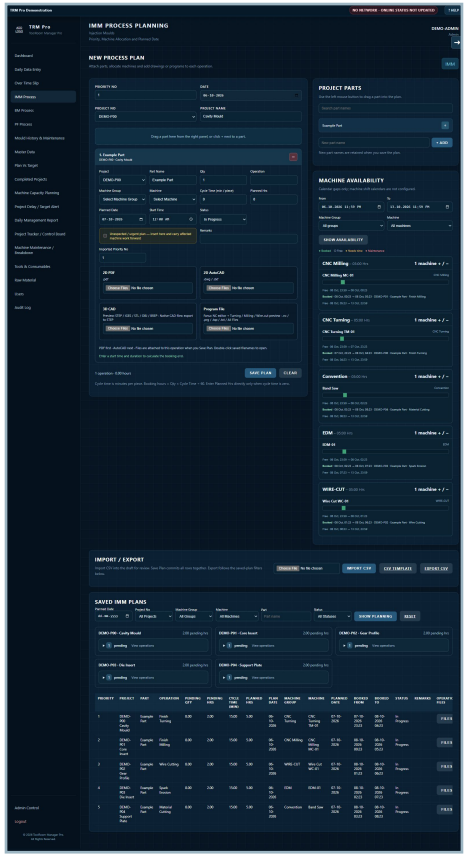
A new emergency job needs 2 hours on TM-01. Mark it urgent, set its start and save. Check the affected work carried forward and the yellow urgent/affected indications.

Practical notes

An urgent checkbox only takes effect when the plan is saved in an active planning state with an allocated machine/booking. It does not create extra machine capacity. The calculated hours and subsequent schedules should be reviewed against real shifts and due dates.

15 Process planning: every operation field

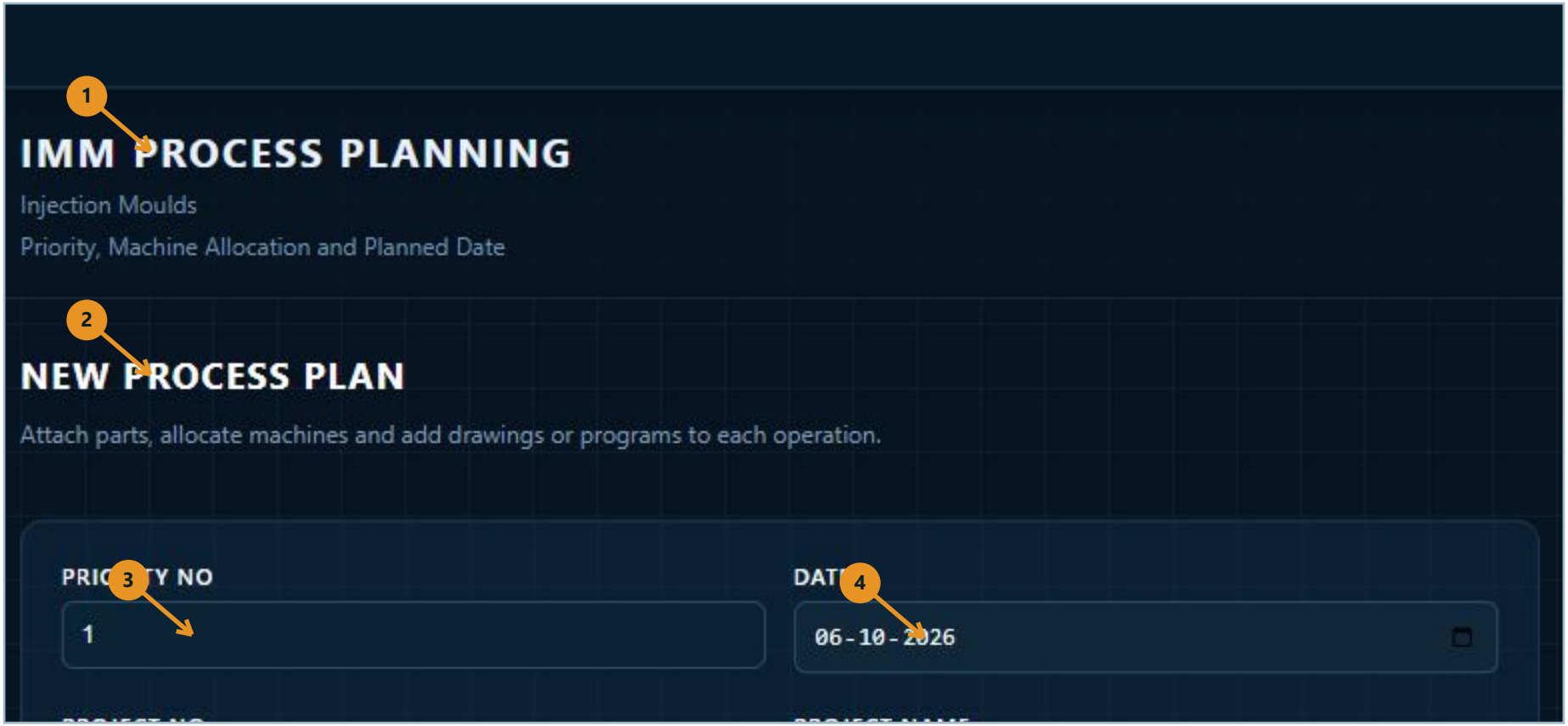
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 01 • orange numbers point to the named controls



1. IMM PROCESS PLANNING
Enter or review this value as labeled

2. NEW PROCESS PLAN
Enter or review this value as labeled

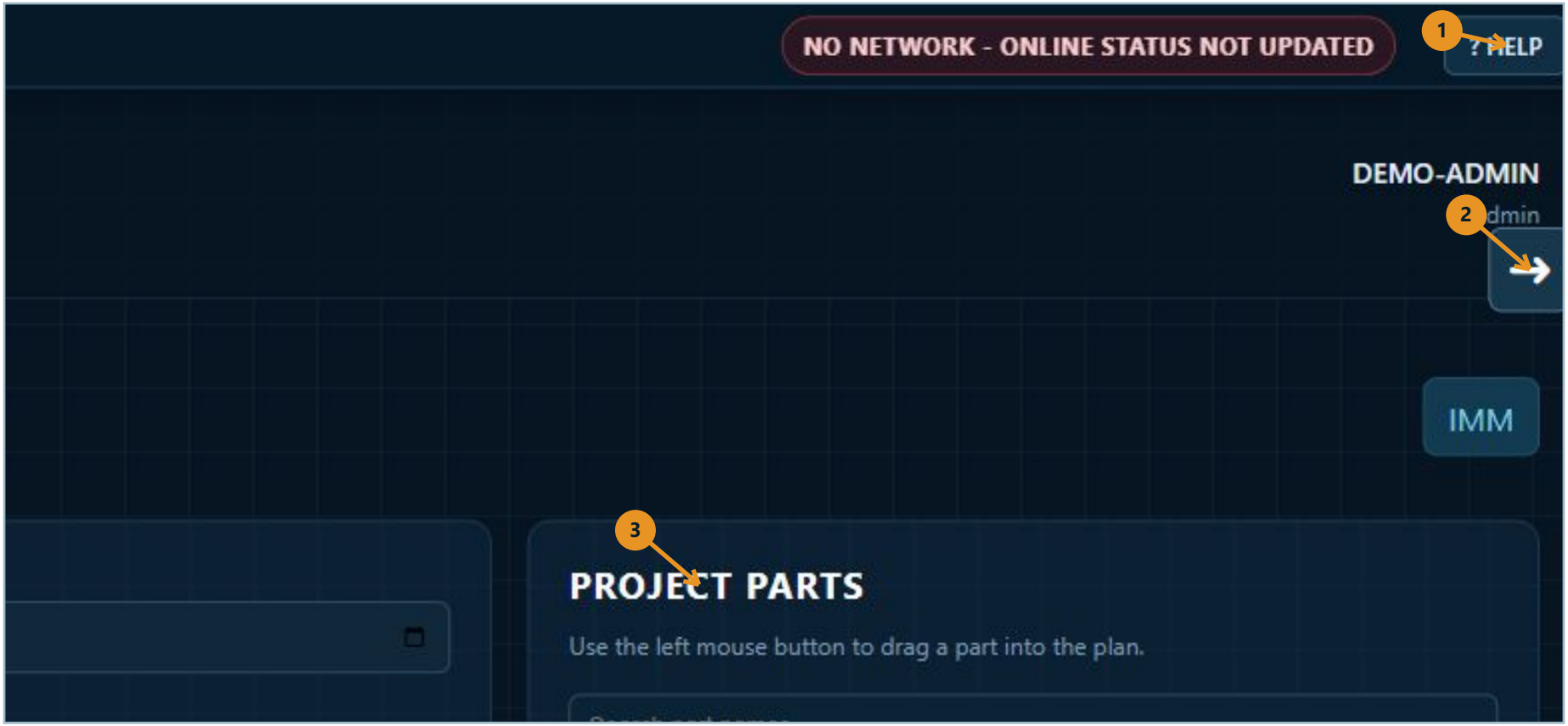
3. PRIORITY NO
Enter the numeric quantity/time required by the label

4. DATE
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

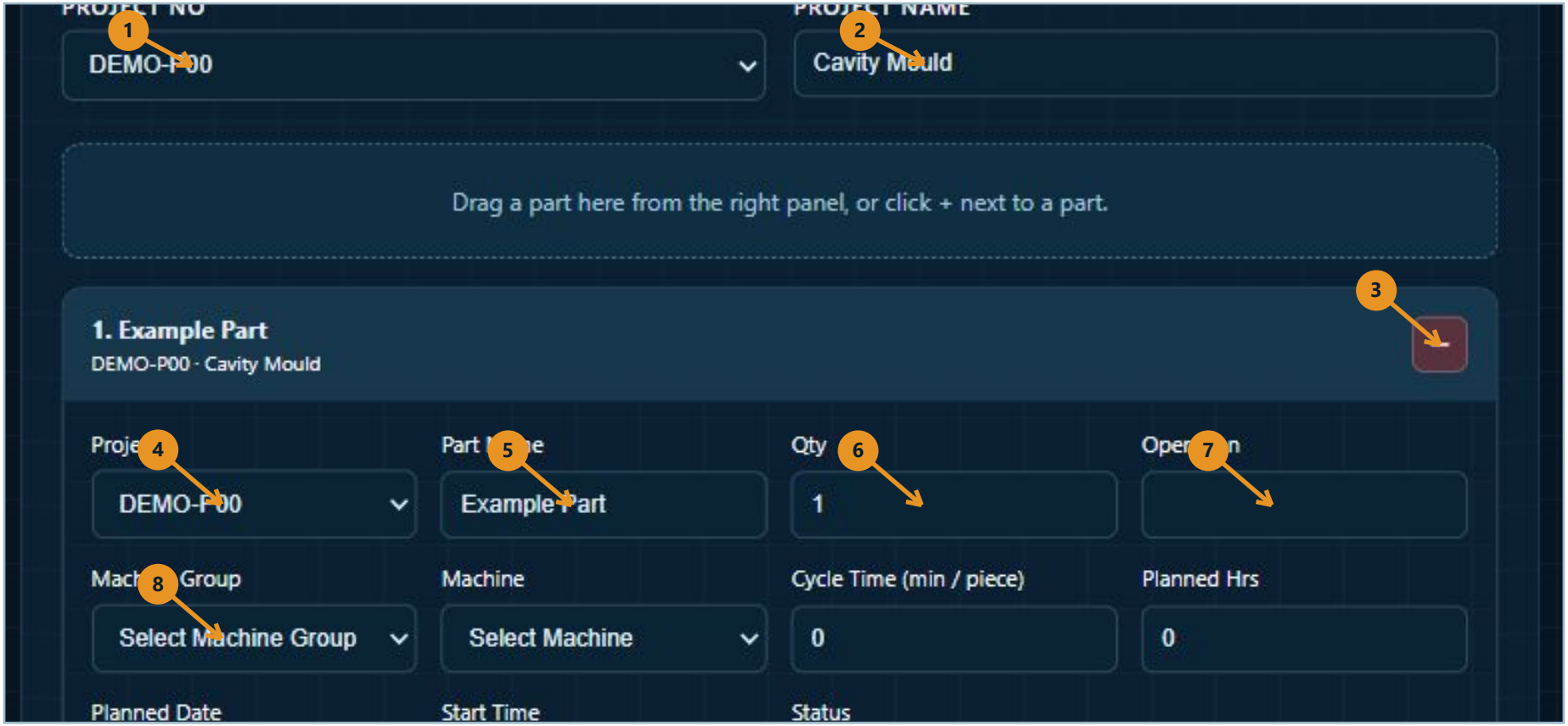
2. Expand Process Planning
Use this named action/tab for the workflow described in this chapter

3. PROJECT PARTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 03 • orange numbers point to the named controls



1. PROJECT NO
Choose the required value

2. PROJECT NAME
Enter or review this value as labeled

3. Remove Example Part
Use this named action/tab for the workflow described in this chapter

4. Project Select Project DEMO-P00 DEMO-P01 DEMO-P02 DEMO-P03 D
Choose the required value

5. Part Name
Enter or review this value as labeled

6. Qty
Enter the numeric quantity/time required by the label

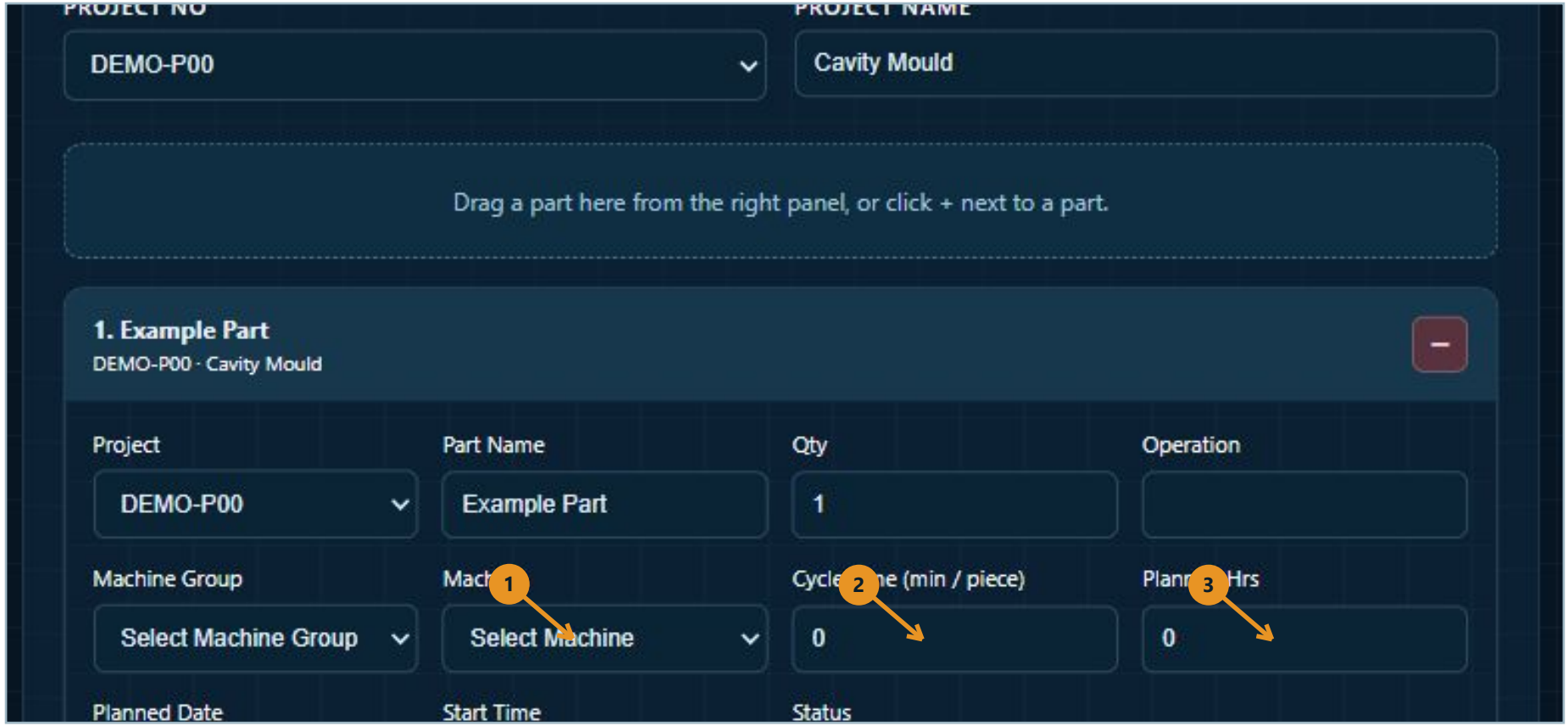
7. Operation
Enter or review this value as labeled

8. Machine Group Select Machine Group CNC Milling CNC Turning C
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 04 • orange numbers point to the named controls



1. Machine Select Machine
Choose the required value

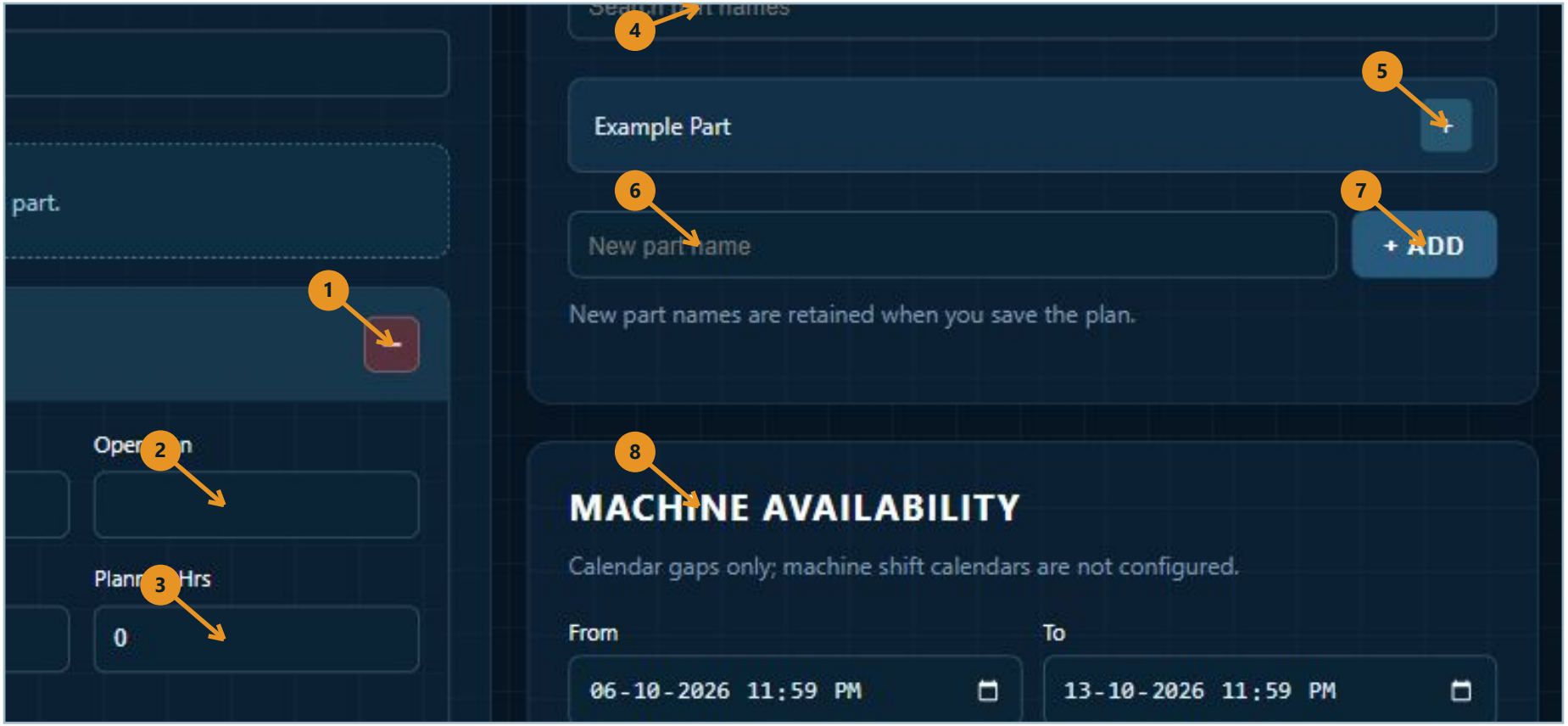
2. Cycle Time (min / piece)
Enter the numeric quantity/time required by the label

3. Planned Hrs
Enter the numeric quantity/time required by the label

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 05 • orange numbers point to the named controls



1. Remove Example Part
Use this named action/tab for the workflow described in this chapter

2. Operation
Enter or review this value as labeled

3. Planned Hrs
Enter the numeric quantity/time required by the label

4. Search part names
Enter or review this value as labeled

5. Attach Example Part
Use this named action/tab for the workflow described in this chapter

6. New part name
Enter or review this value as labeled

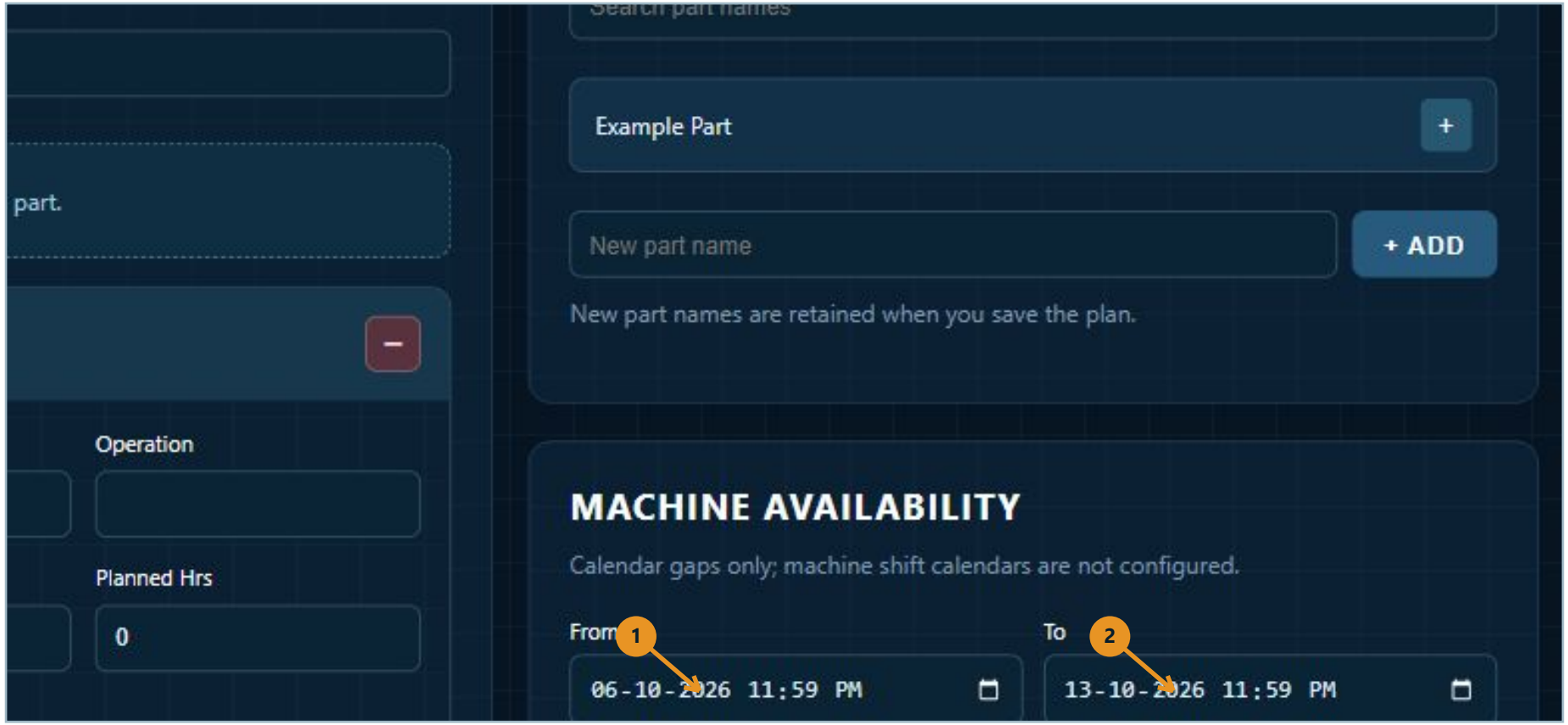
7. + ADD
Use this named action/tab for the workflow described in this chapter

8. MACHINE AVAILABILITY
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 06 • orange numbers point to the named controls



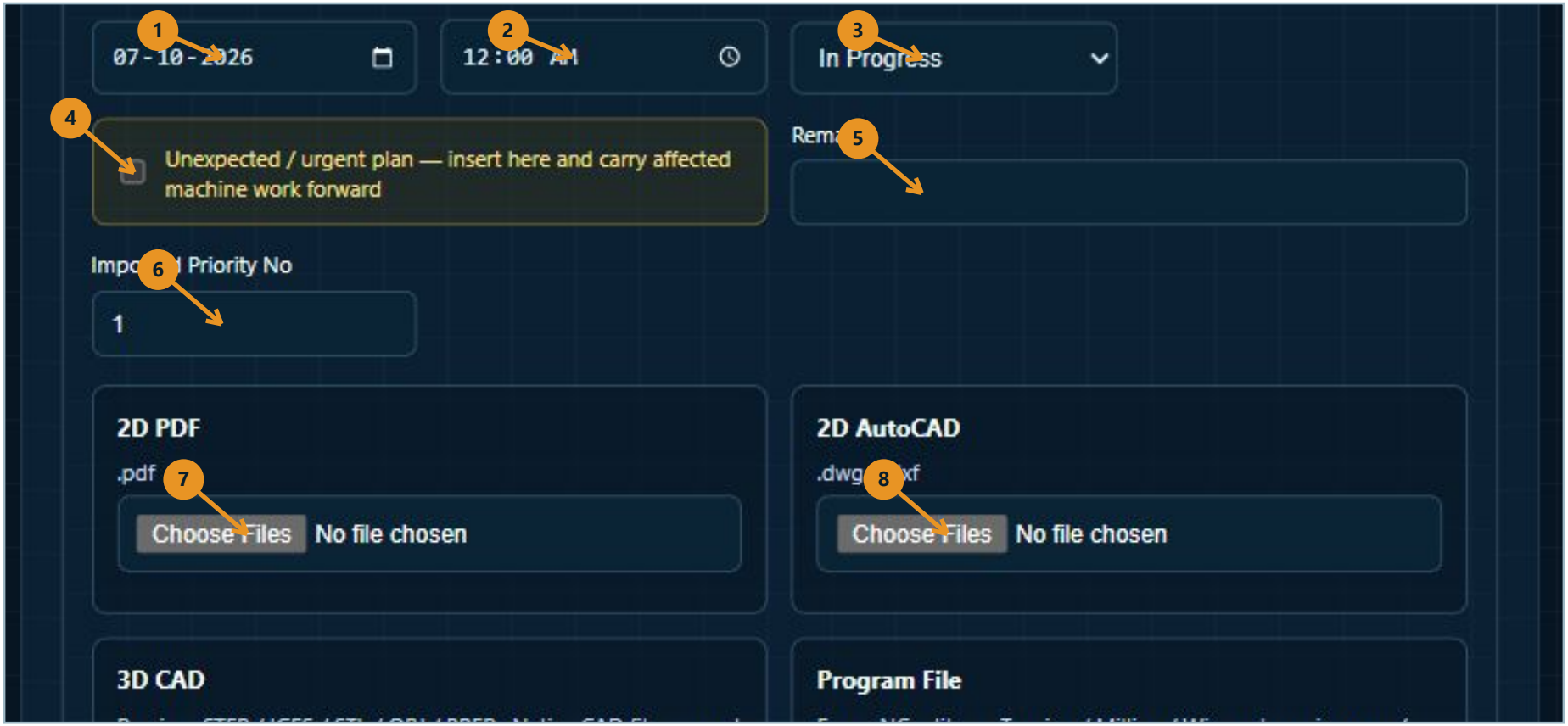
1. From
Select the actual reference date/time for this record or report

2. To
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 07 • orange numbers point to the named controls



1. Planned Date
Select the actual reference date/time for this record or report

2. Start Time
Select the actual reference date/time for this record or report

3. Status Select Status In Progress Not Started Hold Completed
Choose the required value

4. Unexpected / urgent plan — insert here and carry affected ma
Tick to enable this option; clear to disable it

5. Remarks
Record meaningful instructions or explanation

6. Imported Priority No
Enter the numeric quantity/time required by the label

7. 2D PDF attachments for Example Part
Choose the appropriate file from this PC, then use the corresponding upload/add action.

8. 2D AutoCAD attachments for Example Part
Choose the appropriate file from this PC, then use the corresponding upload/add action.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 08 • orange numbers point to the named controls



1. Machine Group All groups CNC Milling CNC Turning Convention
Choose the required value

2. Machine All machines CNC Milling MC-01 CNC Turning TM-01 Ban
Choose the required value

3. SHOW AVAILABILITY
Apply the selected filters and refresh the displayed results

4. CNC Milling – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 09 • orange numbers point to the named controls



1. 3D CAD attachments for Example Part
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. Program File attachments for Example Part
Choose the appropriate file from this PC, then use the corresponding upload/add action.

3. SAVE PLAN
Commit the reviewed fields for this form

4. CLEAR
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 10 • orange numbers point to the named controls



1. SAVE PLAN
Commit the reviewed fields for this form

2. CLEAR
Clear the current draft/checks or reset the filter as indicated

3. CNC Turning – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

4. Convention – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 11 • orange numbers point to the named controls



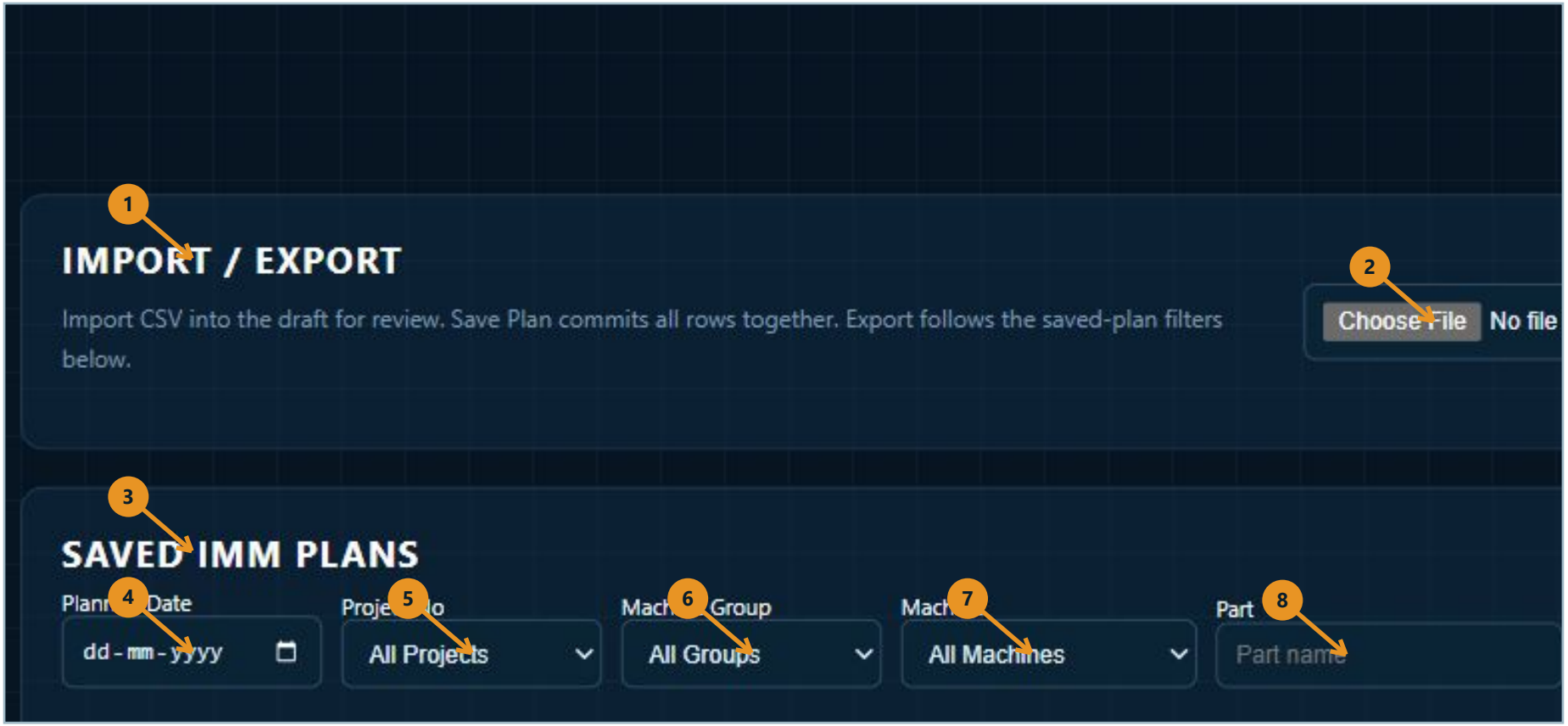
1. EDM – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. WIRE-CUT – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 12 • orange numbers point to the named controls



1. IMPORT / EXPORT
Enter or review this value as labeled

2. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

3. SAVED IMM PLANS
Enter or review this value as labeled

4. Planned Date
Select the actual reference date/time for this record or report

5. Project Filter
Choose the required value

6. Group Filter
Choose the required value

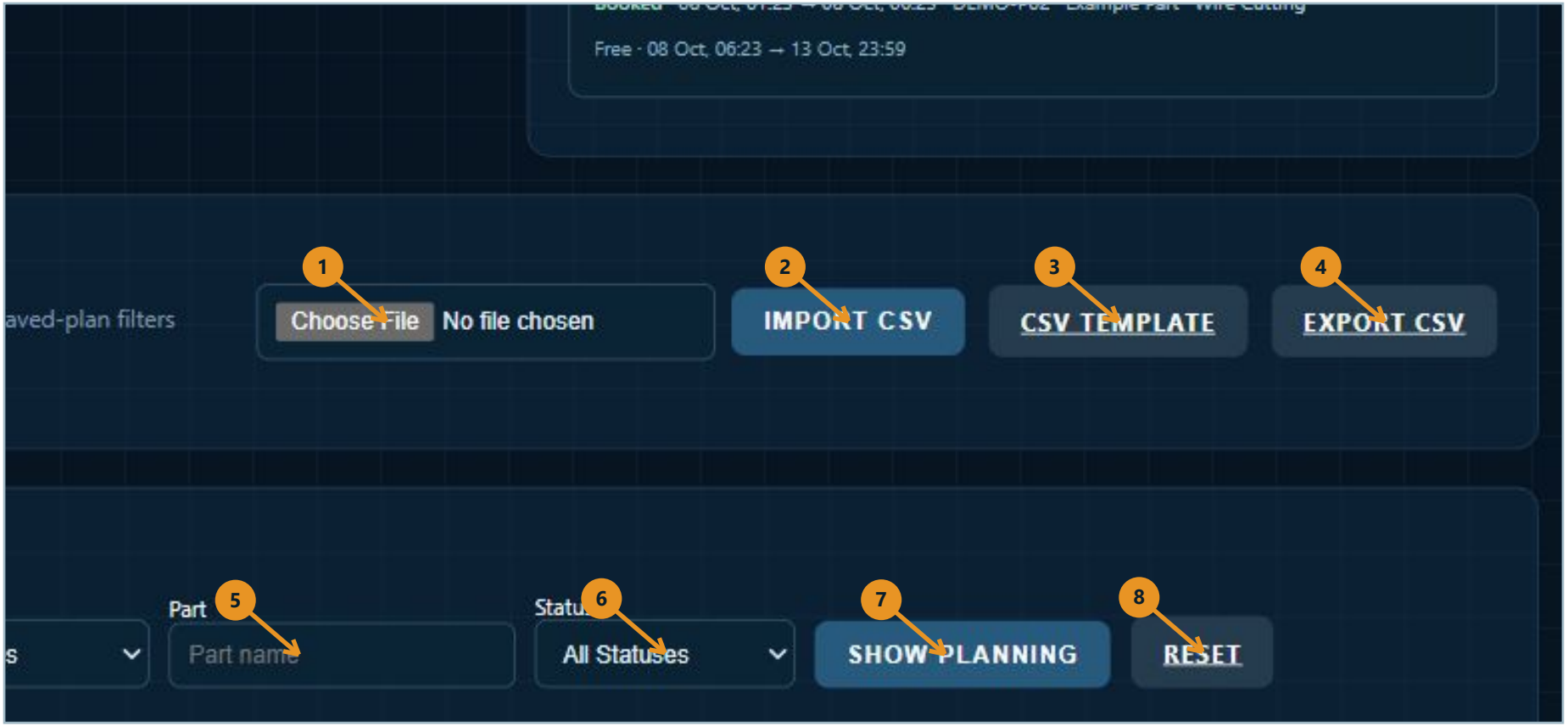
7. Machine Filter
Choose the required value

8. Part
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 13 • orange numbers point to the named controls



1. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. IMPORT CSV
Use this named action/tab for the workflow described in this chapter

3. CSV TEMPLATE
Use this named action/tab for the workflow described in this chapter

4. EXPORT CSV
Export the current report/stock scope in the indicated format

5. Part
Enter or review this value as labeled

6. Status Filter
Choose the required value

7. SHOW PLANNING
Apply the selected filters and refresh the displayed results

8. RESET
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 14 • orange numbers point to the named controls



1. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

2. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

3. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

4. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 15 • orange numbers point to the named controls



1. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

2. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

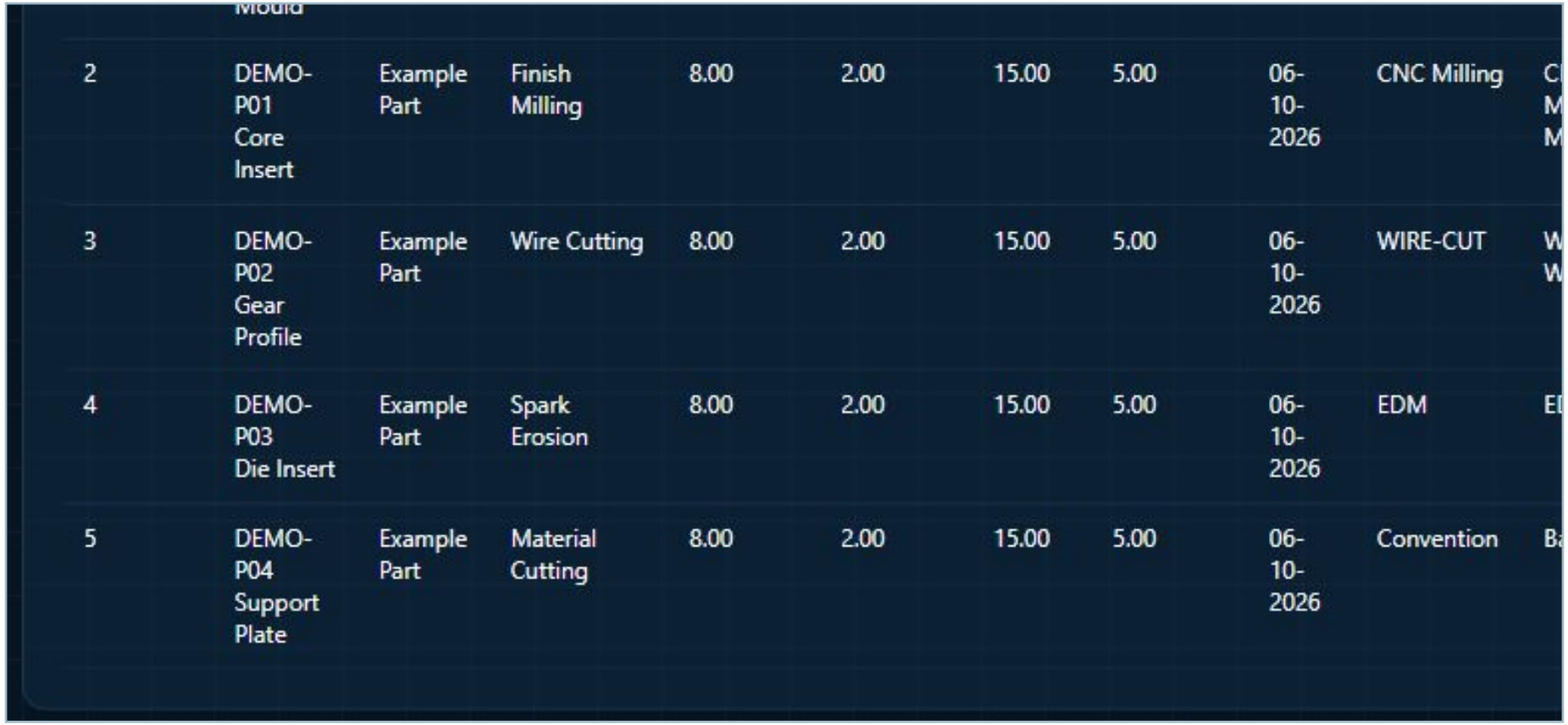
3. 1 pending View operations
Use this named action/tab for the workflow described in this chapter

4. FILES (6)
Open the operation file list for PDF, CAD and NC attachments.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 16 • orange numbers point to the named controls

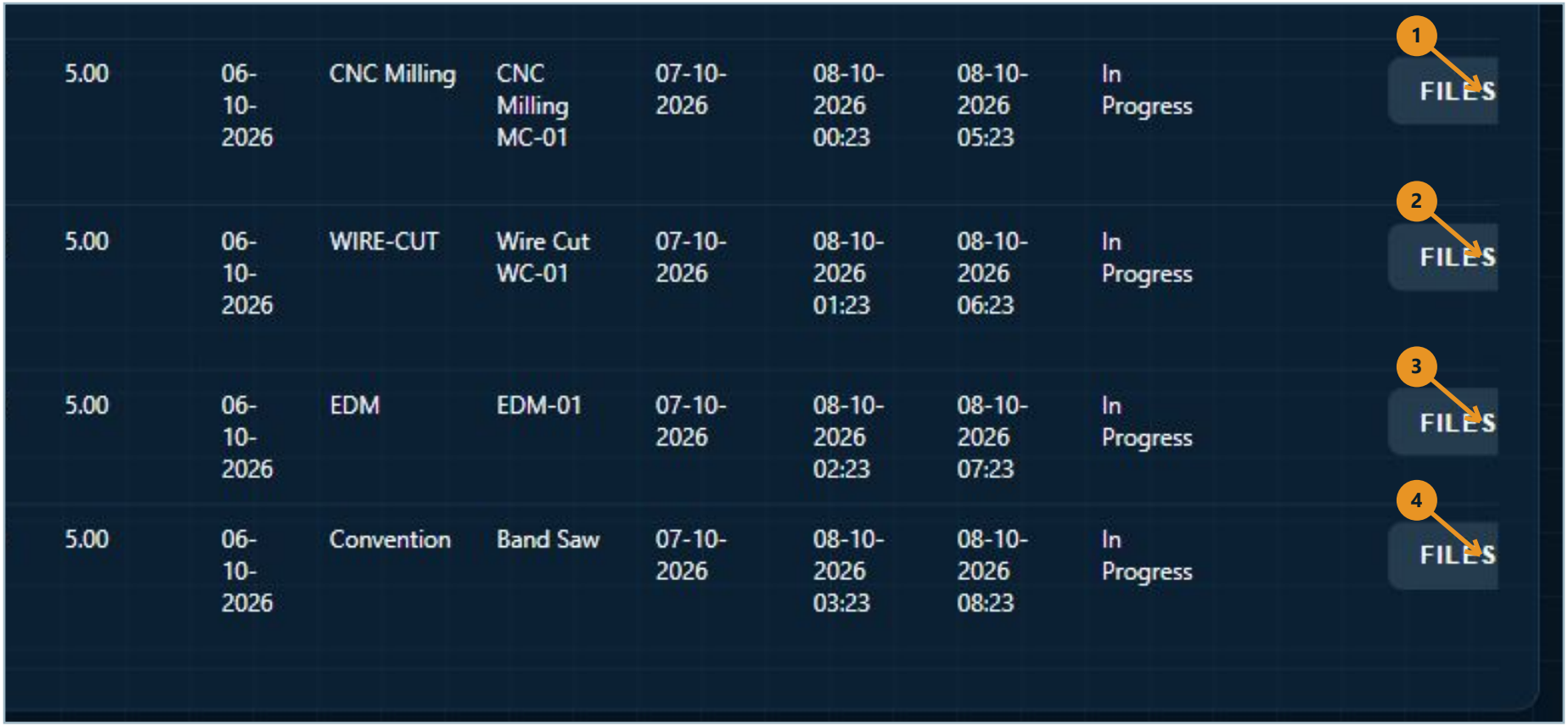


	Mould									
2	DEMO-P01 Core Insert	Example Part	Finish Milling	8.00	2.00	15.00	5.00	06-10-2026	CNC Milling	C M M
3	DEMO-P02 Gear Profile	Example Part	Wire Cutting	8.00	2.00	15.00	5.00	06-10-2026	WIRE-CUT	W W
4	DEMO-P03 Die Insert	Example Part	Spark Erosion	8.00	2.00	15.00	5.00	06-10-2026	EDM	E
5	DEMO-P04 Support Plate	Example Part	Material Cutting	8.00	2.00	15.00	5.00	06-10-2026	Convention	B

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Illustrated detail 17 • orange numbers point to the named controls



1. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

2. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

3. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

4. FILES (0)
Open the operation file list for PDF, CAD and NC attachments.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

15 Process planning: every operation field

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
IMM PROCESS PLANNING	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Expand Process Planning	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEW PROCESS PLAN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PRIORITY NO	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
PROJECT NO	Choose the required value. Available choices: Select Project No. The displayed records follow this screen's scope and account access.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Remove Example Part	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Project Select Project DEMO-P00 DEMO-P01 DEMO-P02 DEMO-P03 DEMO-P04	Choose the required value. Available choices: Select Project. The displayed records follow this screen's scope and account access.
Part Name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Qty	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Operation	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Machine Group Select Machine Group CNC Milling CNC Turning Convention EDM Store Keeper WIRE-CUT	Choose the required value. Available choices: Select Machine Group; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine Select Machine	Choose the required value. Available choices: Select Machine. The displayed records follow this screen's scope and account access.

Cycle Time (min / piece)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Planned Hrs	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Planned Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Start Time	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Status Select Status In Progress Not Started Hold Completed Cancelled	Choose the required value. Available choices: Select Status; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen's scope and account access.
Unexpected / urgent plan — insert here and carry affected machine work forward	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Remarks	Record meaningful instructions or explanation. Do not use remarks to replace the correct numeric fields.
Imported Priority No	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
2D PDF attachments for Example Part	Choose the appropriate file from this PC, then use the corresponding upload/add action.
2D AutoCAD attachments for Example Part	Choose the appropriate file from this PC, then use the corresponding upload/add action.
3D CAD attachments for Example Part	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Program File attachments for Example Part	Choose the appropriate file from this PC, then use the corresponding upload/add action.
SAVE PLAN	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
CLEAR	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
PROJECT PARTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

Search part names	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Attach Example Part	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
New part name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
+ ADD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINE AVAILABILITY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
From	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
To	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Machine Group All groups CNC Milling CNC Turning Convention EDM Store Keeper WIRE-CUT	Choose the required value. Available choices: All groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine All machines CNC Milling MC-01 CNC Turning TM-01 Band Saw EDM-01 Wire Cut WC-01	Choose the required value. Available choices: All machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
SHOW AVAILABILITY	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
CNC Milling – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CNC Turning – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Convention – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDM – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

WIRE-CUT – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
IMPORT / EXPORT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Process plan CSV	Choose the appropriate file from this PC, then use the corresponding upload/add action.
IMPORT CSV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CSV TEMPLATE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EXPORT CSV	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
SAVED IMM PLANS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Project Filter	Choose the required value. Available choices: All Projects. The displayed records follow this screen's scope and account access.
Group Filter	Choose the required value. Available choices: All Groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine Filter	Choose the required value. Available choices: All Machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
Part	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Status Filter	Choose the required value. Available choices: All Statuses; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen's scope and account access.
SHOW PLANNING	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
RESET	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
1 pending View operations	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

FILES (6)	Open the operation file list for PDF, CAD and NC attachments.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DELETE	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.
FILES (0)	Open the operation file list for PDF, CAD and NC attachments.

16 BM Process planning

Workflow • read before using the illustrated controls

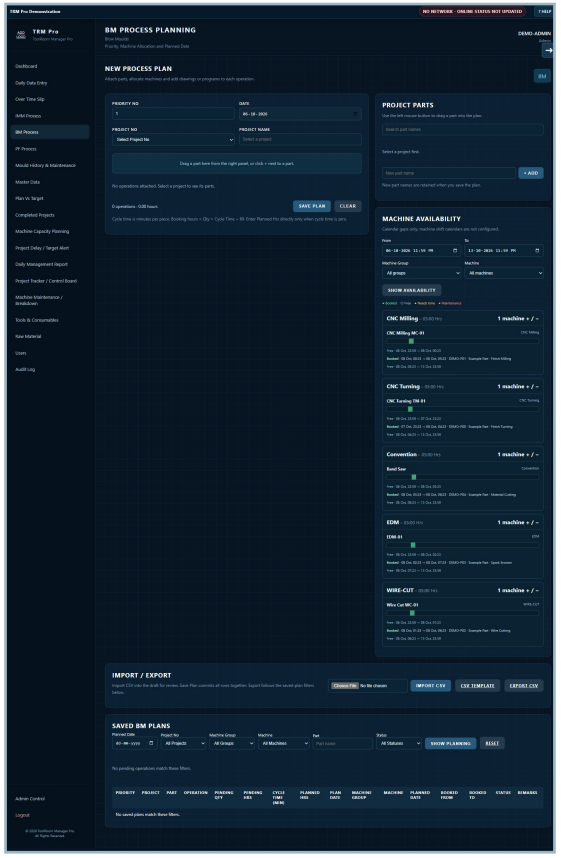
1. Open BM Process from the sidebar.
2. Select a BM project and attach its parts. Fill operations using the common planning workflow.
3. Review bookings and SAVE PLAN. Saved BM plans are filtered separately from IMM/PF.

Practical notes

An empty demonstration department is normal. Your actual parts and projects must be created for that department first.

16 BM Process planning

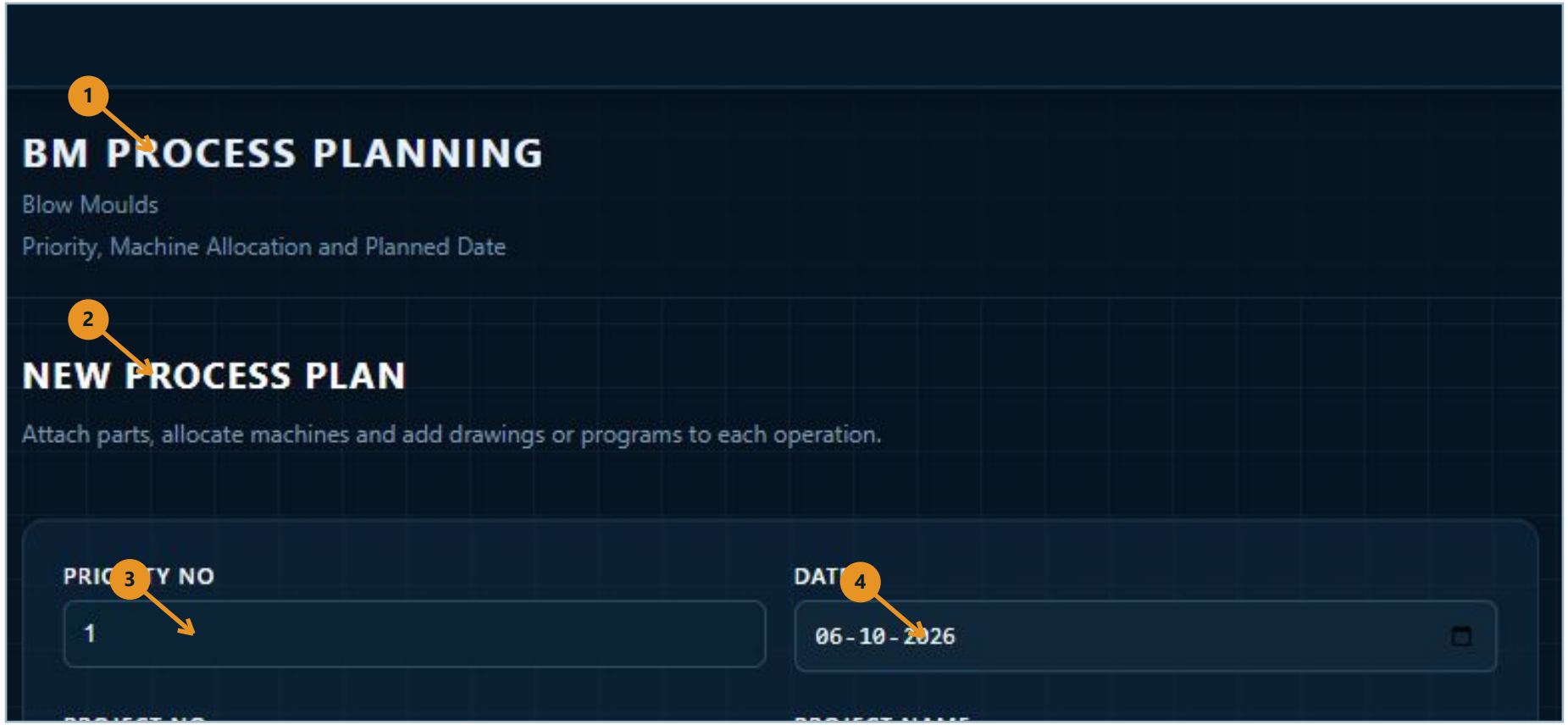
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 01 • orange numbers point to the named controls



1. BM PROCESS PLANNING
Enter or review this value as labeled

2. NEW PROCESS PLAN
Enter or review this value as labeled

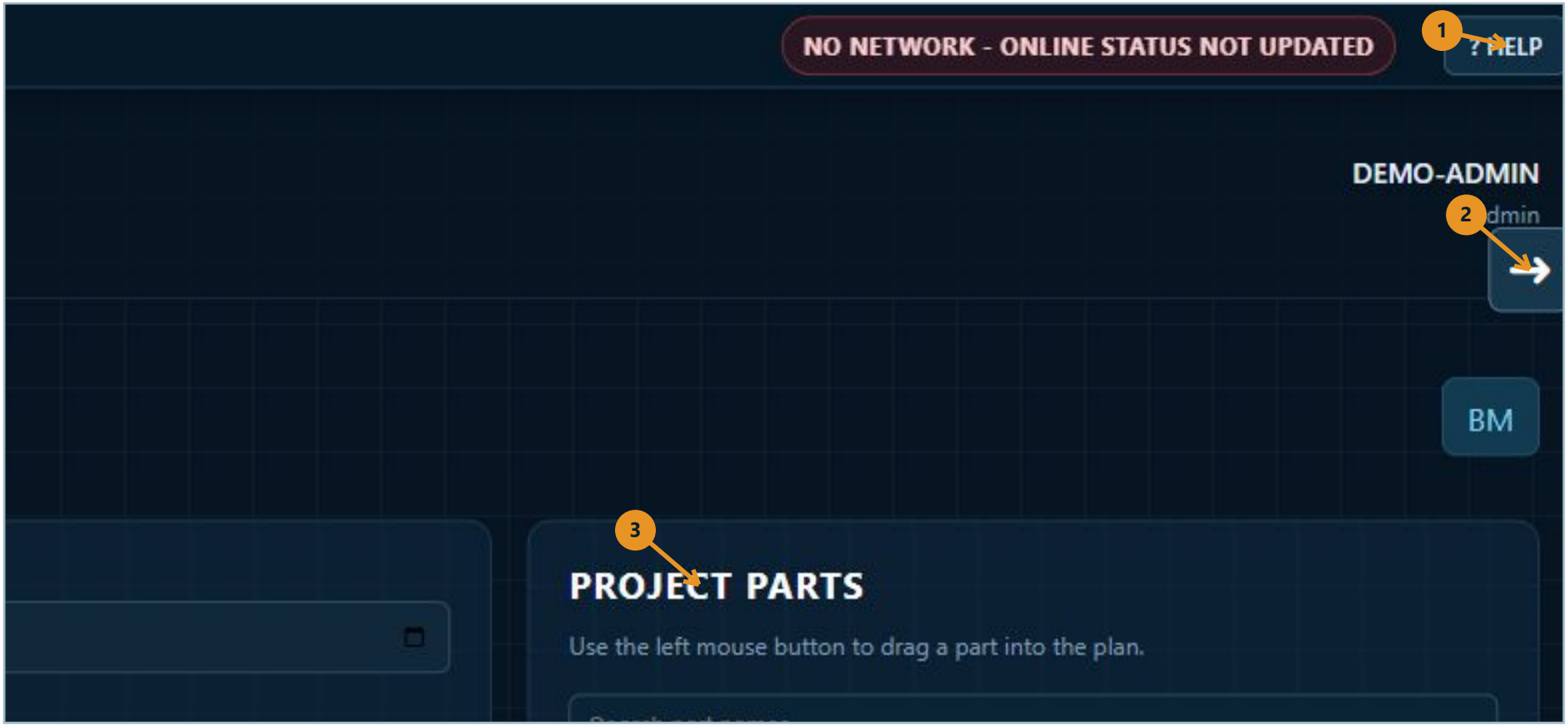
3. PRIORITY NO
Enter the numeric quantity/time required by the label

4. DATE
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

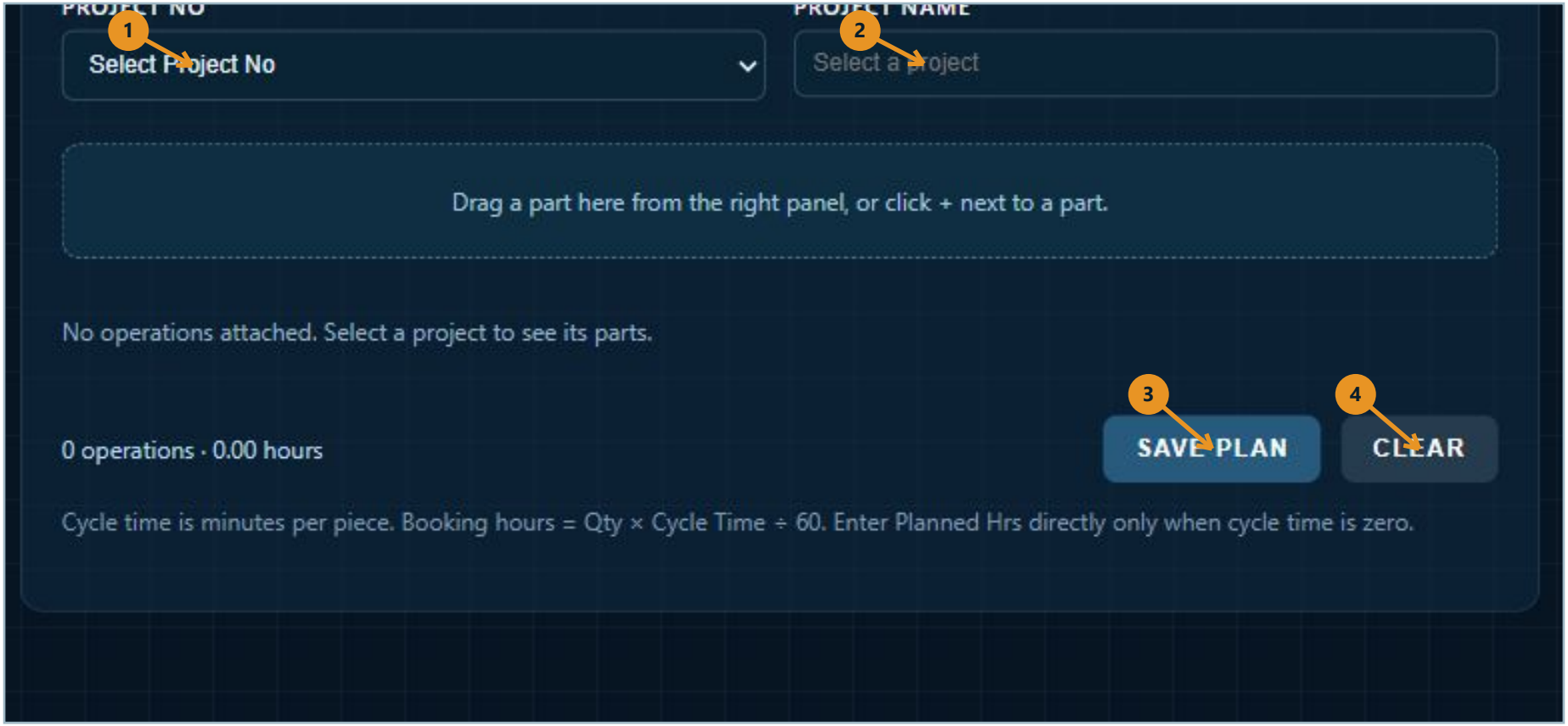
2. Expand Process Planning
Use this named action/tab for the workflow described in this chapter

3. PROJECT PARTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 03 • orange numbers point to the named controls



1. PROJECT NO
Choose the required value

2. PROJECT NAME
Enter or review this value as labeled

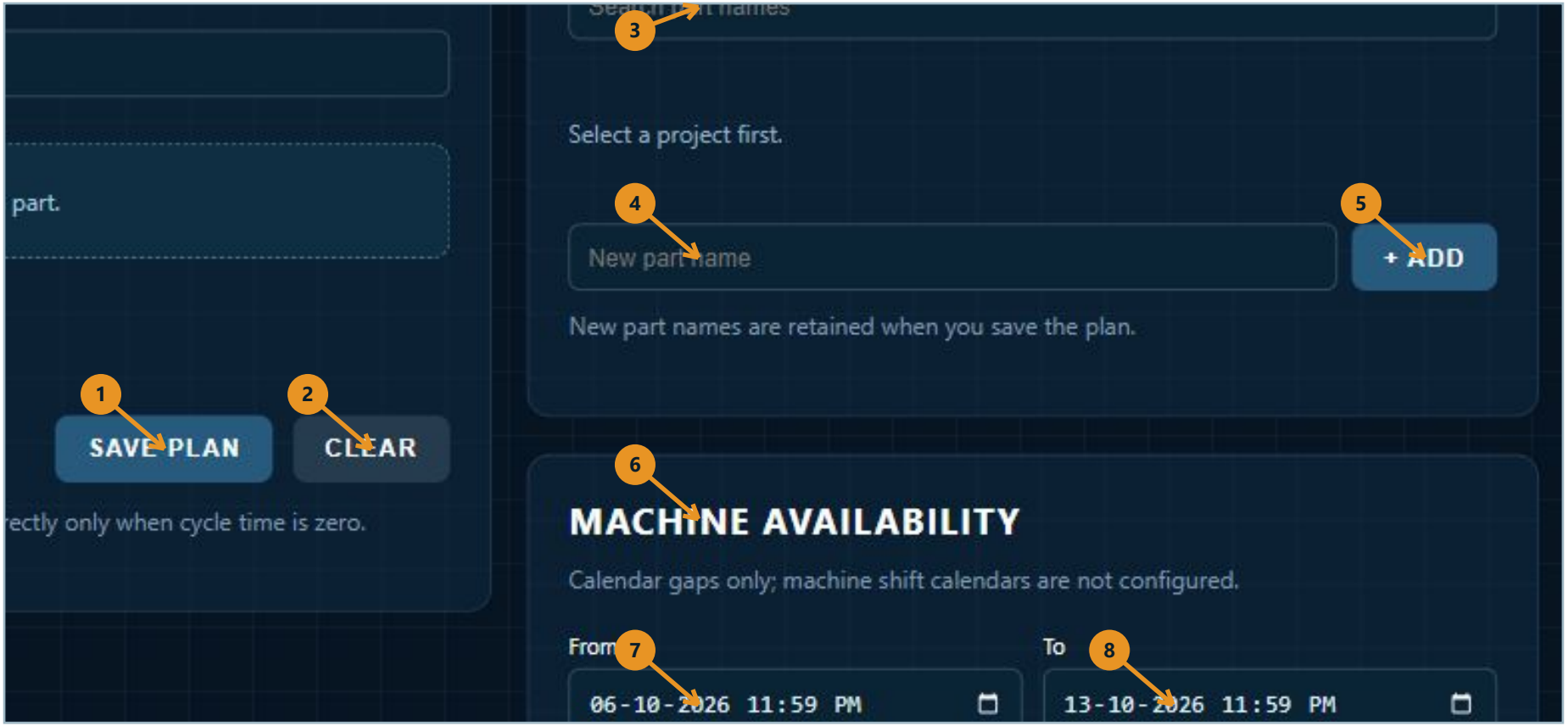
3. SAVE PLAN
Commit the reviewed fields for this form

4. CLEAR
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 04 • orange numbers point to the named controls



1. SAVE PLAN
Commit the reviewed fields for this form

2. CLEAR
Clear the current draft/checks or reset the filter as indicated

3. Search part names
Enter or review this value as labeled

4. New part name
Enter or review this value as labeled

5. + ADD
Use this named action/tab for the workflow described in this chapter

6. MACHINE AVAILABILITY
Enter or review this value as labeled

7. From
Select the actual reference date/time for this record or report

8. To
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 05 • orange numbers point to the named controls



1. Machine Group All groups CNC Milling CNC Turning Convention
Choose the required value

2. Machine All machines CNC Milling MC-01 CNC Turning TM-01 Ban
Choose the required value

3. SHOW AVAILABILITY
Apply the selected filters and refresh the displayed results

4. CNC Milling – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 06 • orange numbers point to the named controls



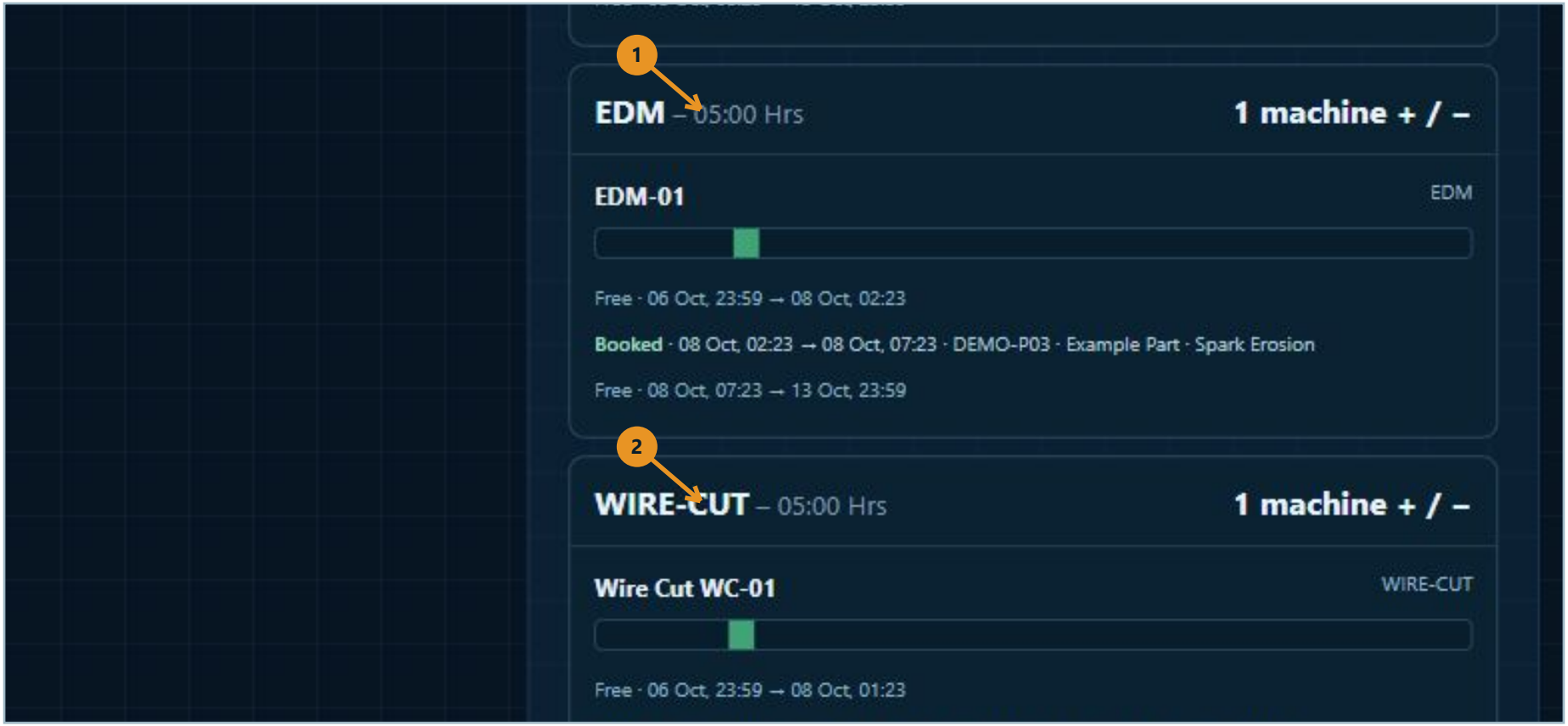
1. CNC Turning – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. Convention – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 07 • orange numbers point to the named controls



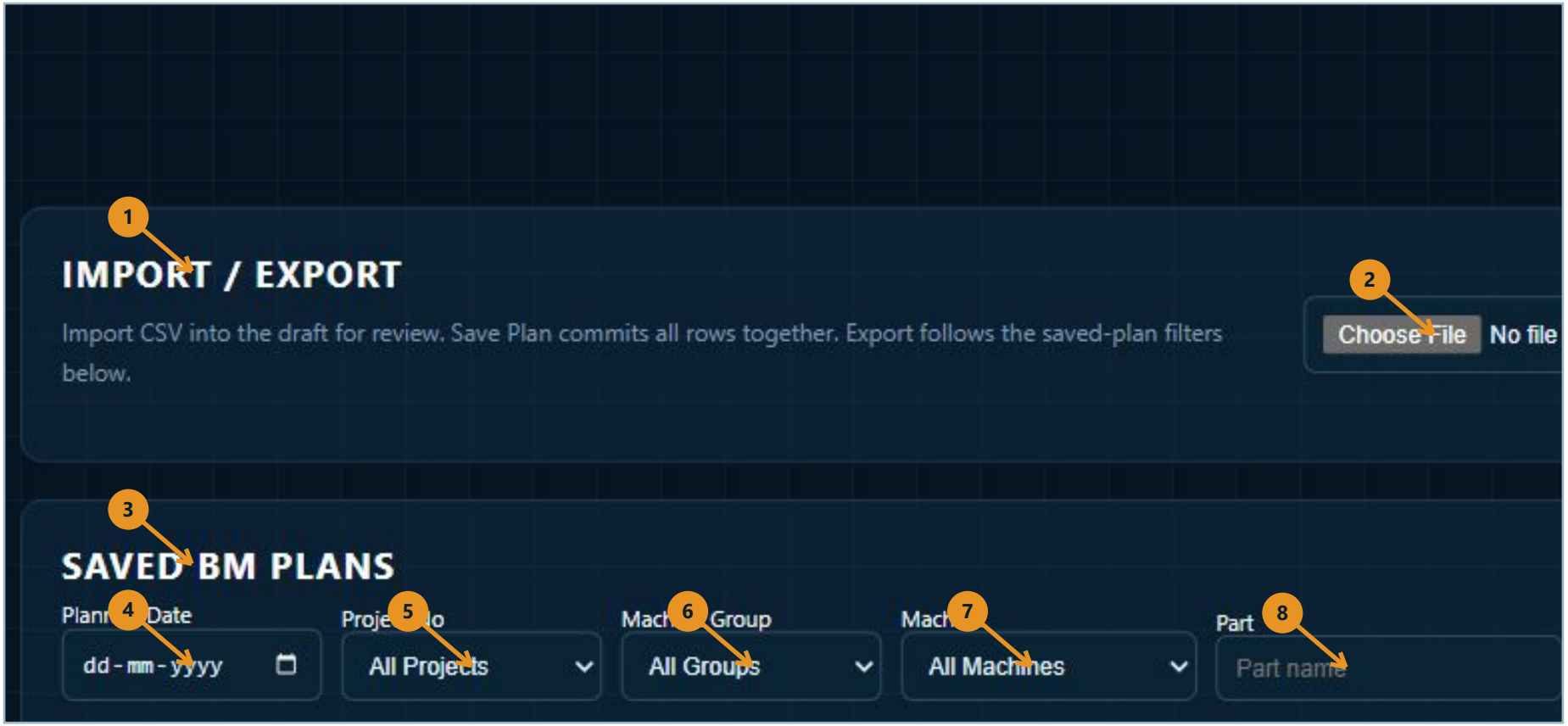
1. EDM – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. WIRE-CUT – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 08 • orange numbers point to the named controls



1. IMPORT / EXPORT
Enter or review this value as labeled

2. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

3. SAVED BM PLANS
Enter or review this value as labeled

4. Planned Date
Select the actual reference date/time for this record or report

5. Project Filter
Choose the required value

6. Group Filter
Choose the required value

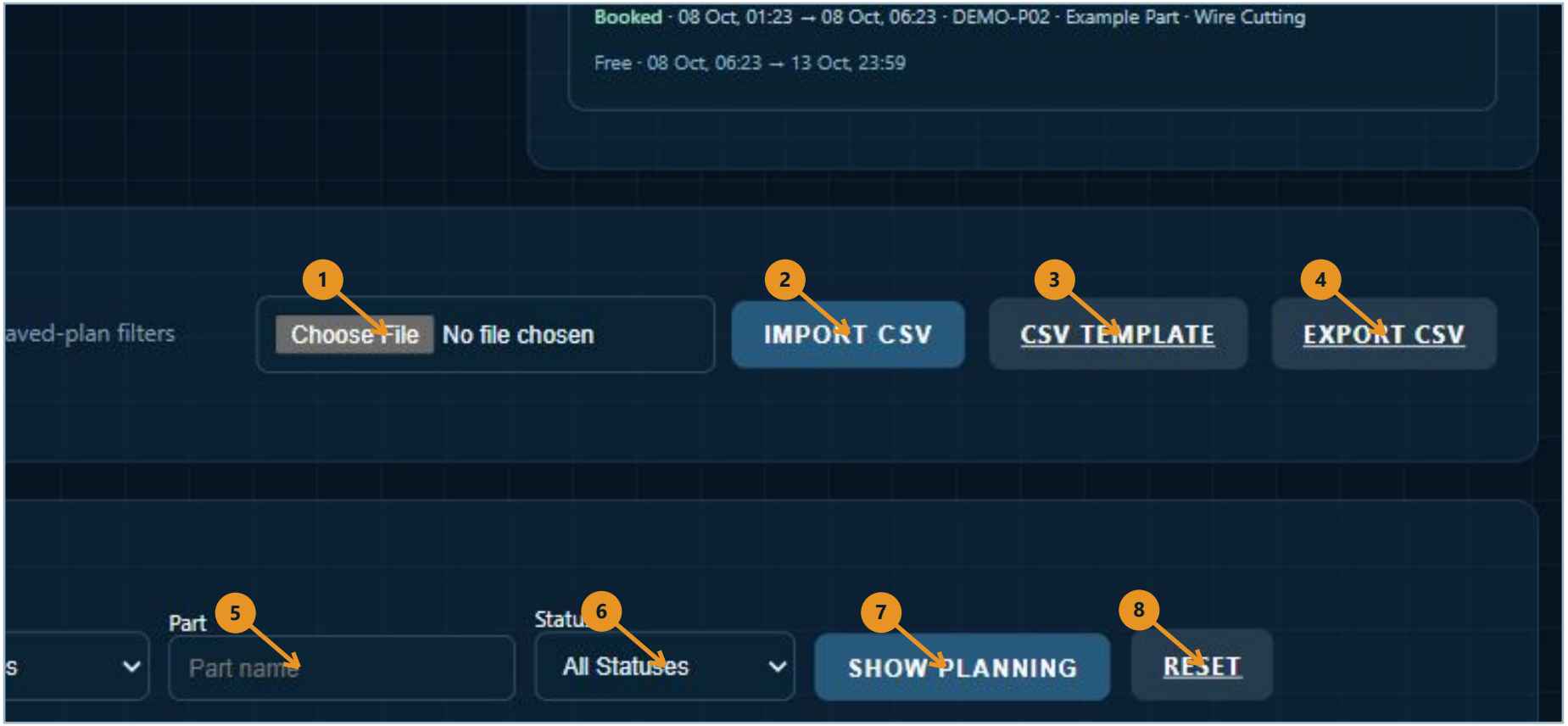
7. Machine Filter
Choose the required value

8. Part
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 09 • orange numbers point to the named controls



1. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. IMPORT CSV
Use this named action/tab for the workflow described in this chapter

3. CSV TEMPLATE
Use this named action/tab for the workflow described in this chapter

4. EXPORT CSV
Export the current report/stock scope in the indicated format

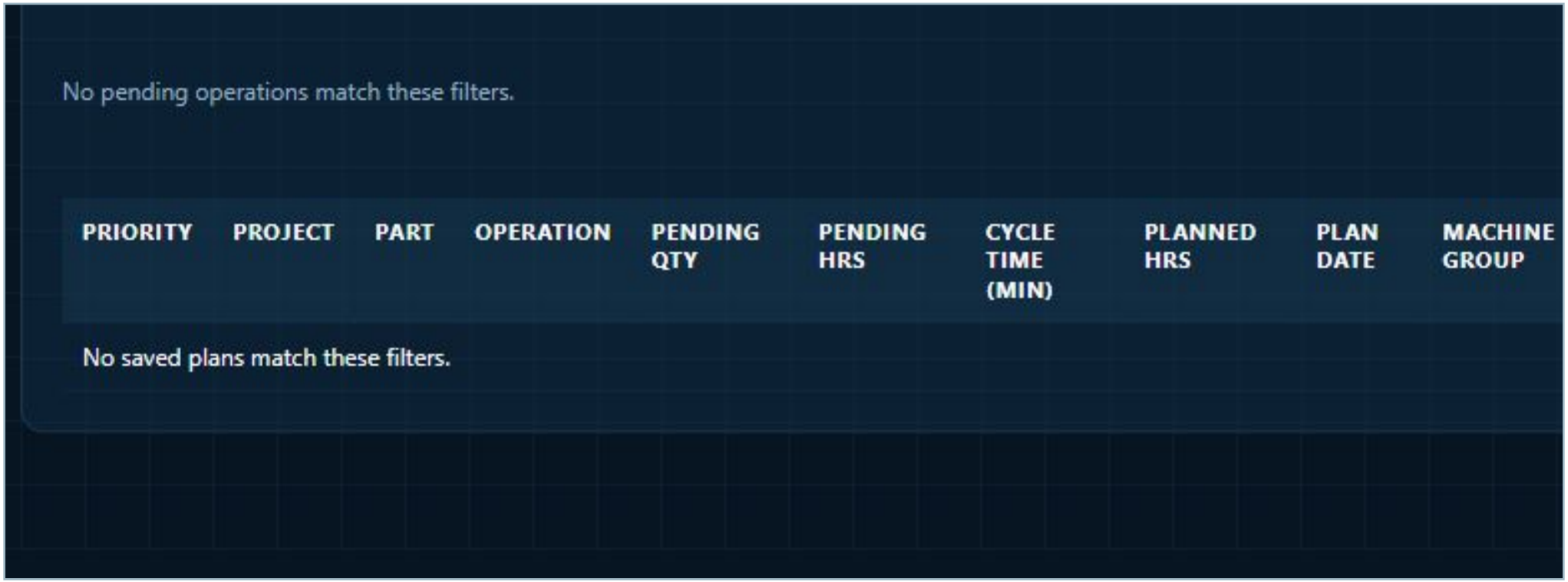
5. Part
Enter or review this value as labeled

6. Status Filter
Choose the required value

7. SHOW PLANNING
Apply the selected filters and refresh the displayed results

8. RESET
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Illustrated detail 11 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

16 BM Process planning

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
BM PROCESS PLANNING	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Expand Process Planning	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEW PROCESS PLAN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PRIORITY NO	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
PROJECT NO	Choose the required value. Available choices: Select Project No. The displayed records follow this screen's scope and account access.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SAVE PLAN	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
CLEAR	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
PROJECT PARTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Search part names	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
New part name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
+ ADD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINE AVAILABILITY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
From	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.

To	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Machine Group All groups CNC Milling CNC Turning Convention EDM Store Keeper WIRE-CUT	Choose the required value. Available choices: All groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine All machines CNC Milling MC-01 CNC Turning TM-01 Band Saw EDM-01 Wire Cut WC-01	Choose the required value. Available choices: All machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
SHOW AVAILABILITY	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
CNC Milling – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CNC Turning – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Convention – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDM – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
WIRE-CUT – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
IMPORT / EXPORT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Process plan CSV	Choose the appropriate file from this PC, then use the corresponding upload/add action.
IMPORT CSV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CSV TEMPLATE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EXPORT CSV	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

SAVED BM PLANS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Planned Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Project Filter	Choose the required value. Available choices: All Projects. The displayed records follow this screen’s scope and account access.
Group Filter	Choose the required value. Available choices: All Groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen’s scope and account access.
Machine Filter	Choose the required value. Available choices: All Machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen’s scope and account access.
Part	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Status Filter	Choose the required value. Available choices: All Statuses; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen’s scope and account access.
SHOW PLANNING	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
RESET	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.

17 PF Process planning

Workflow • read before using the illustrated controls

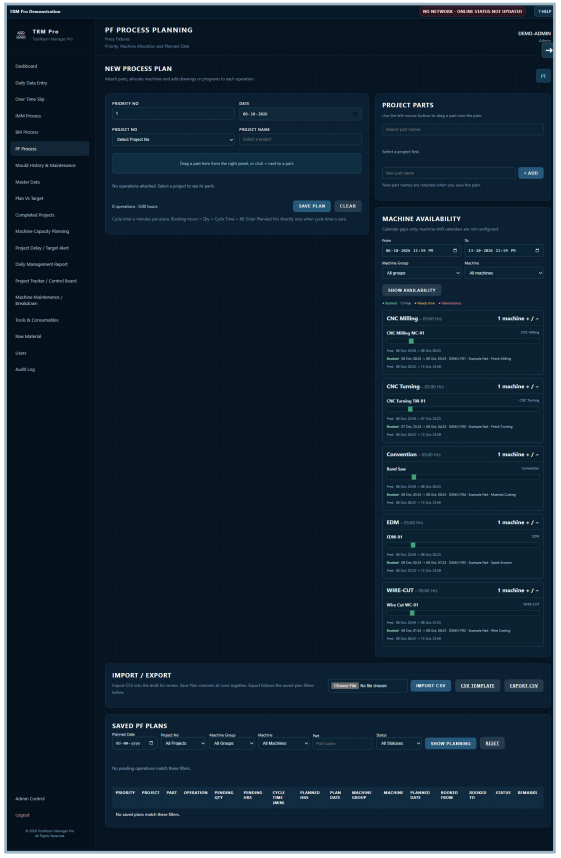
1. Open PF Process from the sidebar.
2. Select a PF project, add its parts and allocate machines.
3. Review priority, hours, active status and bookings before SAVE PLAN.

Practical notes

Use the same field definitions as the IMM operation chapter. User department permissions can restrict which process windows appear.

17 PF Process planning

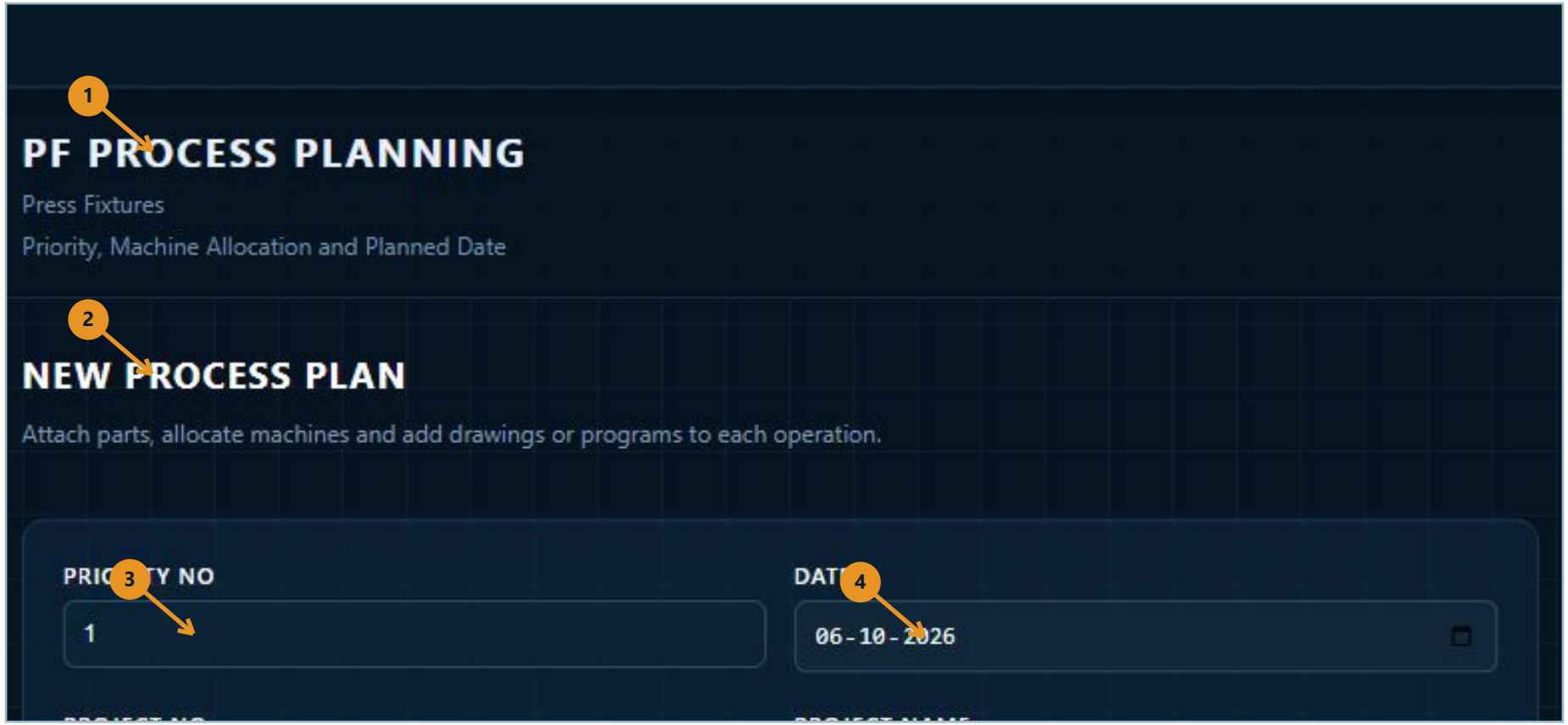
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 01 • orange numbers point to the named controls



1. PF PROCESS PLANNING
Enter or review this value as labeled

2. NEW PROCESS PLAN
Enter or review this value as labeled

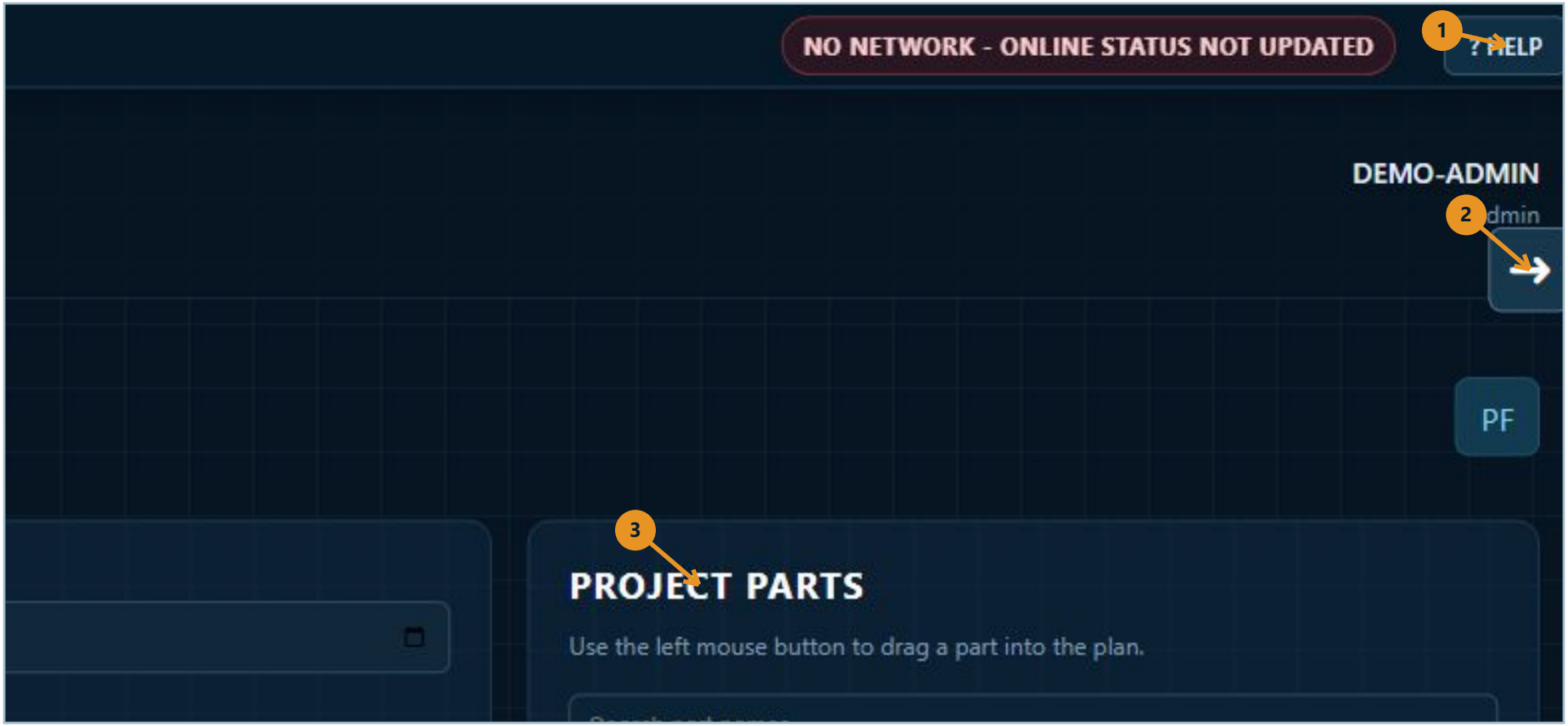
3. PRIORITY NO
Enter the numeric quantity/time required by the label

4. DATE
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

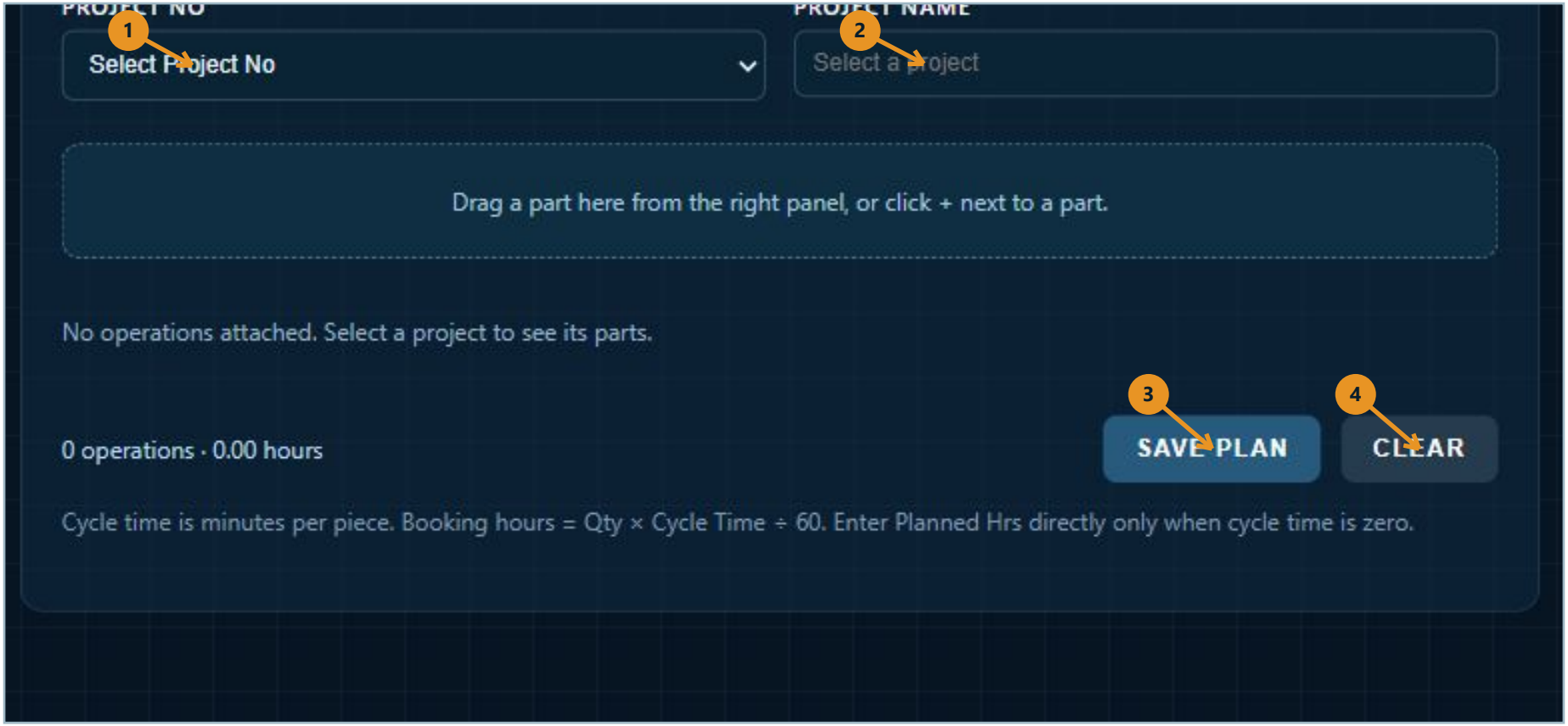
2. Expand Process Planning
Use this named action/tab for the workflow described in this chapter

3. PROJECT PARTS
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 03 • orange numbers point to the named controls



1. PROJECT NO
Choose the required value

2. PROJECT NAME
Enter or review this value as labeled

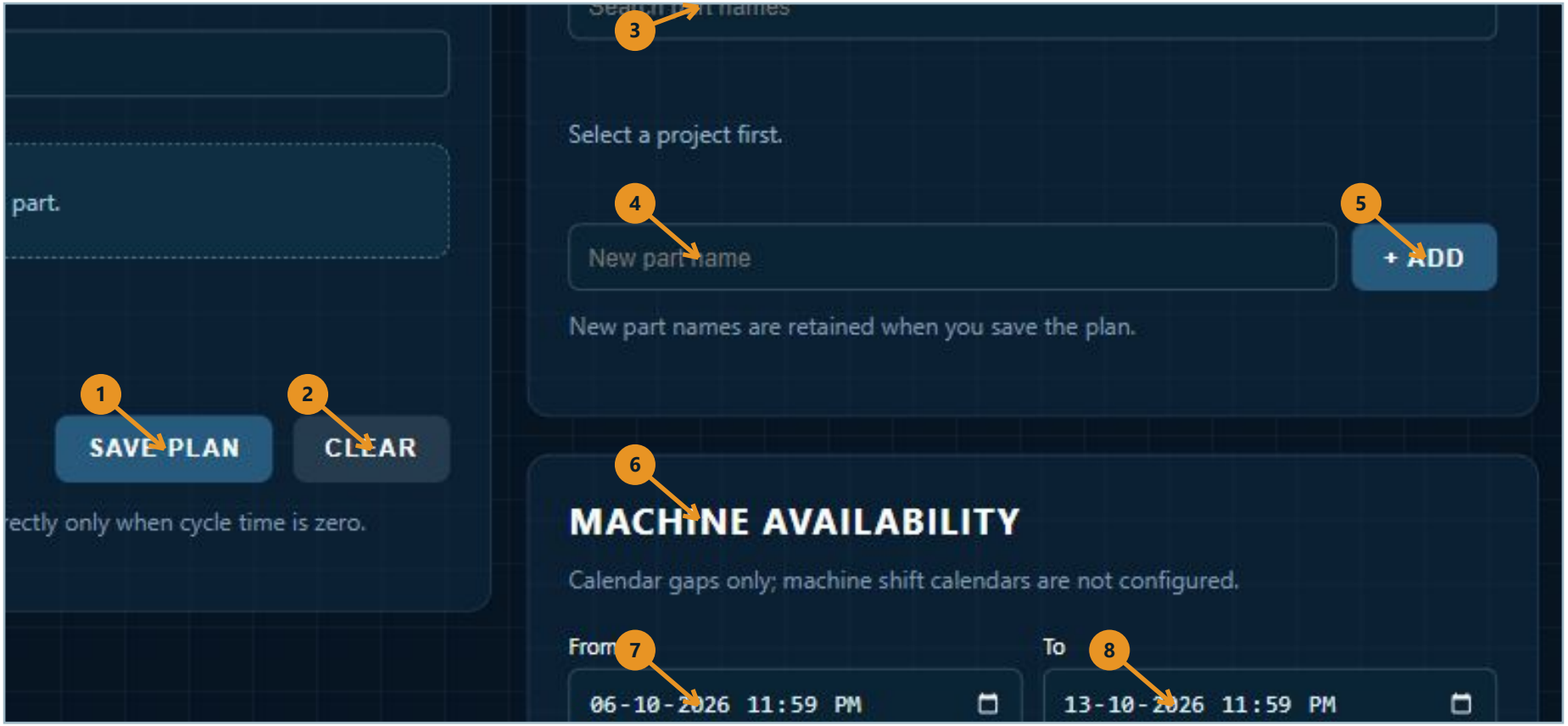
3. SAVE PLAN
Commit the reviewed fields for this form

4. CLEAR
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 04 • orange numbers point to the named controls



1. SAVE PLAN
Commit the reviewed fields for this form

2. CLEAR
Clear the current draft/checks or reset the filter as indicated

3. Search part names
Enter or review this value as labeled

4. New part name
Enter or review this value as labeled

5. + ADD
Use this named action/tab for the workflow described in this chapter

6. MACHINE AVAILABILITY
Enter or review this value as labeled

7. From
Select the actual reference date/time for this record or report

8. To
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 05 • orange numbers point to the named controls



1. Machine Group All groups CNC Milling CNC Turning Convention
Choose the required value

2. Machine All machines CNC Milling MC-01 CNC Turning TM-01 Ban
Choose the required value

3. SHOW AVAILABILITY
Apply the selected filters and refresh the displayed results

4. CNC Milling – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 06 • orange numbers point to the named controls



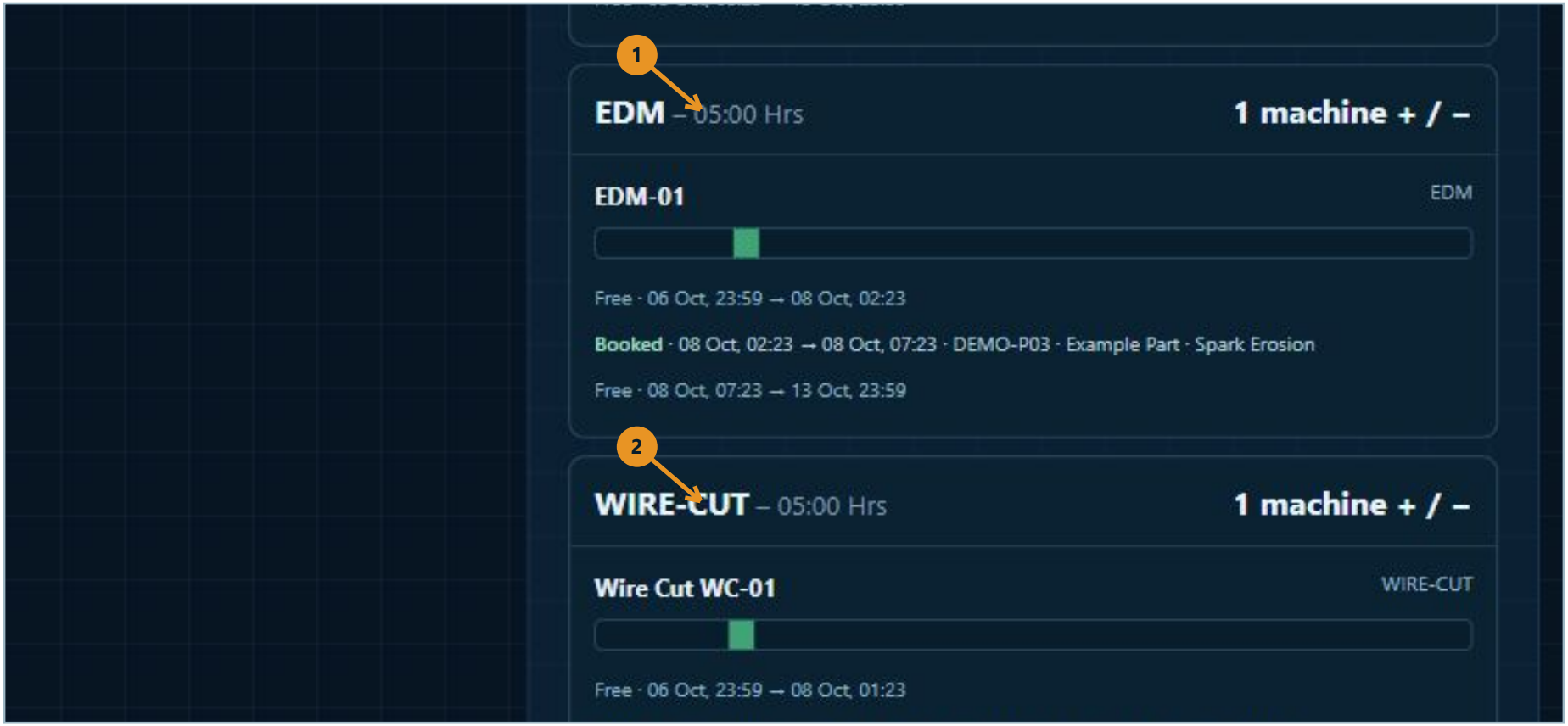
1. CNC Turning – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. Convention – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 07 • orange numbers point to the named controls



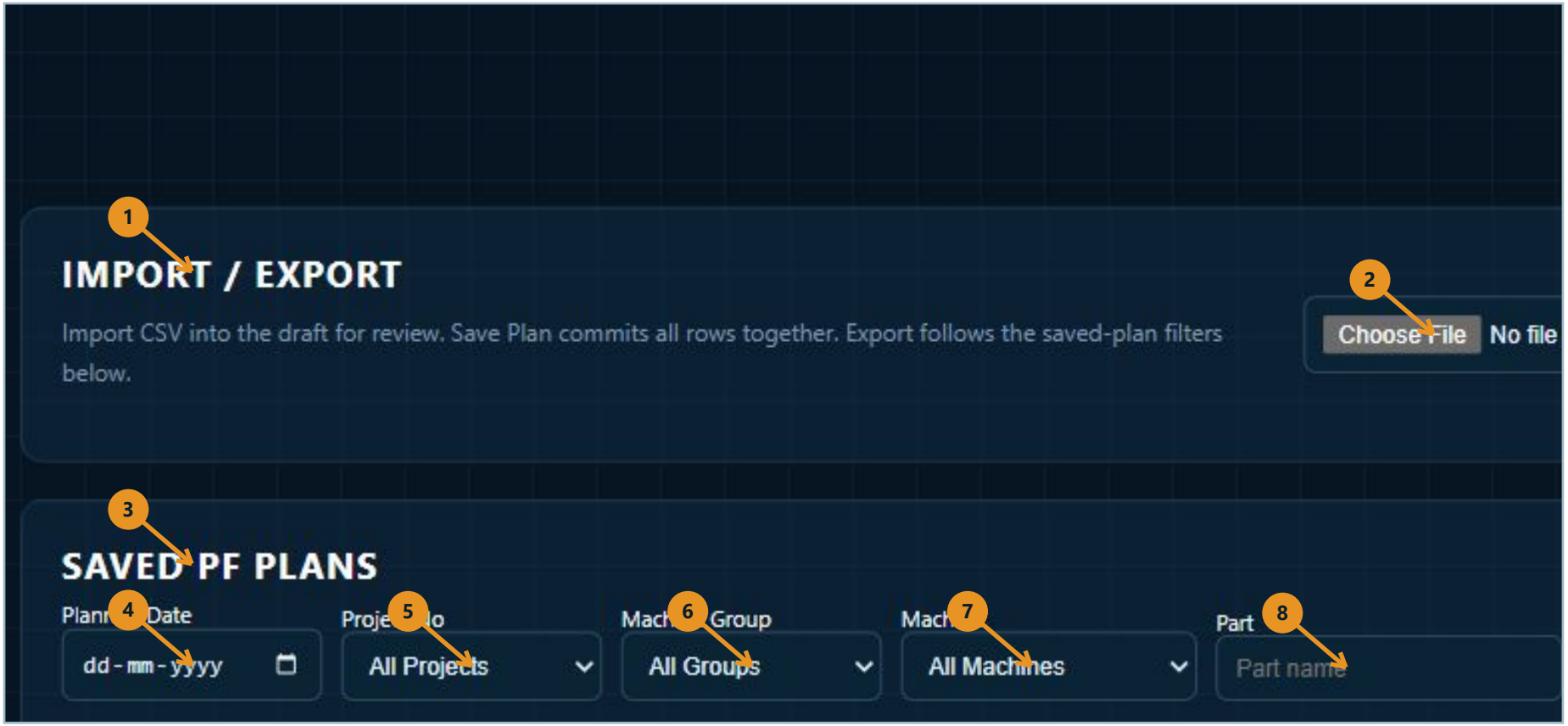
1. EDM – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

2. WIRE-CUT – 05:00 Hrs 1 machine + / –
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 08 • orange numbers point to the named controls



1. IMPORT / EXPORT
Enter or review this value as labeled

2. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

3. SAVED PF PLANS
Enter or review this value as labeled

4. Planned Date
Select the actual reference date/time for this record or report

5. Project Filter
Choose the required value

6. Group Filter
Choose the required value

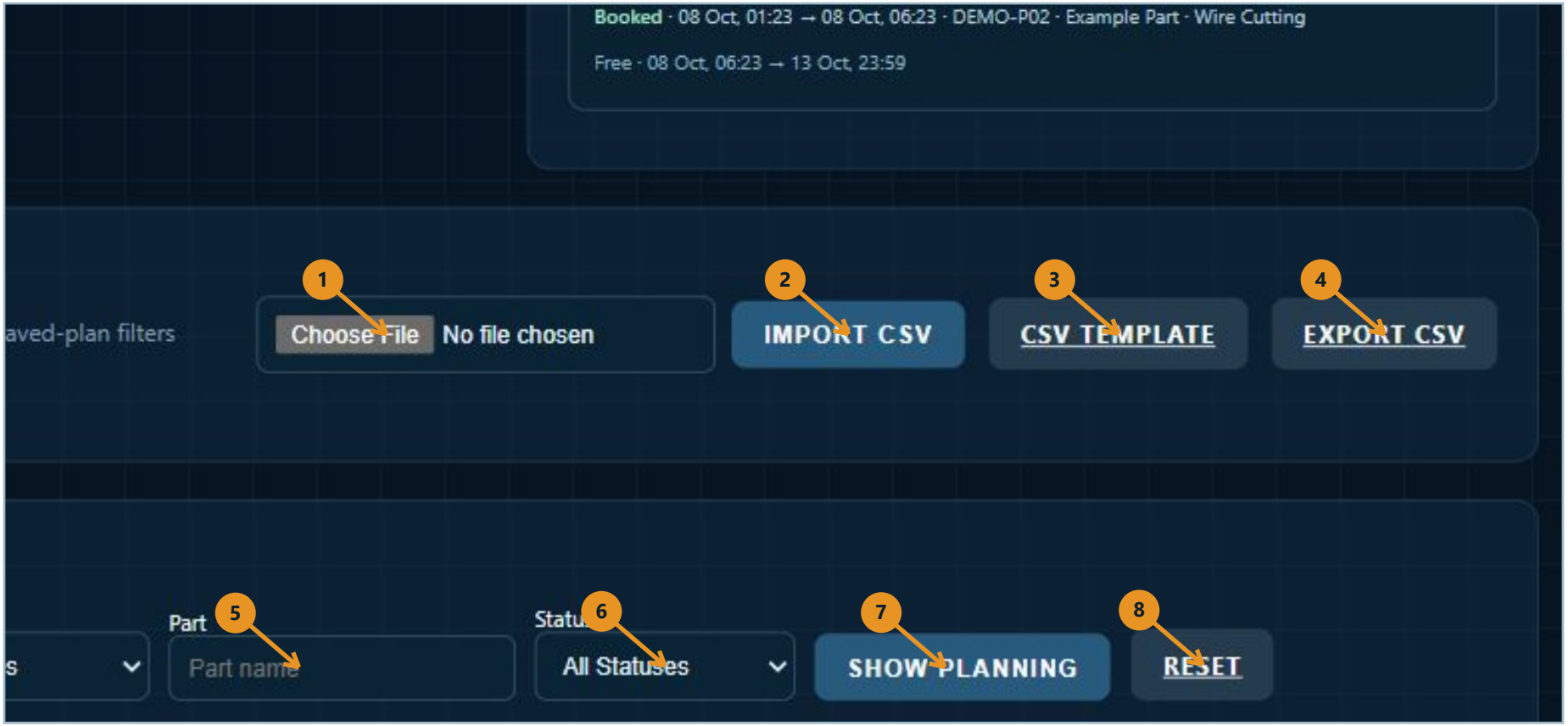
7. Machine Filter
Choose the required value

8. Part
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 09 • orange numbers point to the named controls



1. Process plan CSV
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. IMPORT CSV
Use this named action/tab for the workflow described in this chapter

3. CSV TEMPLATE
Use this named action/tab for the workflow described in this chapter

4. EXPORT CSV
Export the current report/stock scope in the indicated format

5. Part
Enter or review this value as labeled

6. Status Filter
Choose the required value

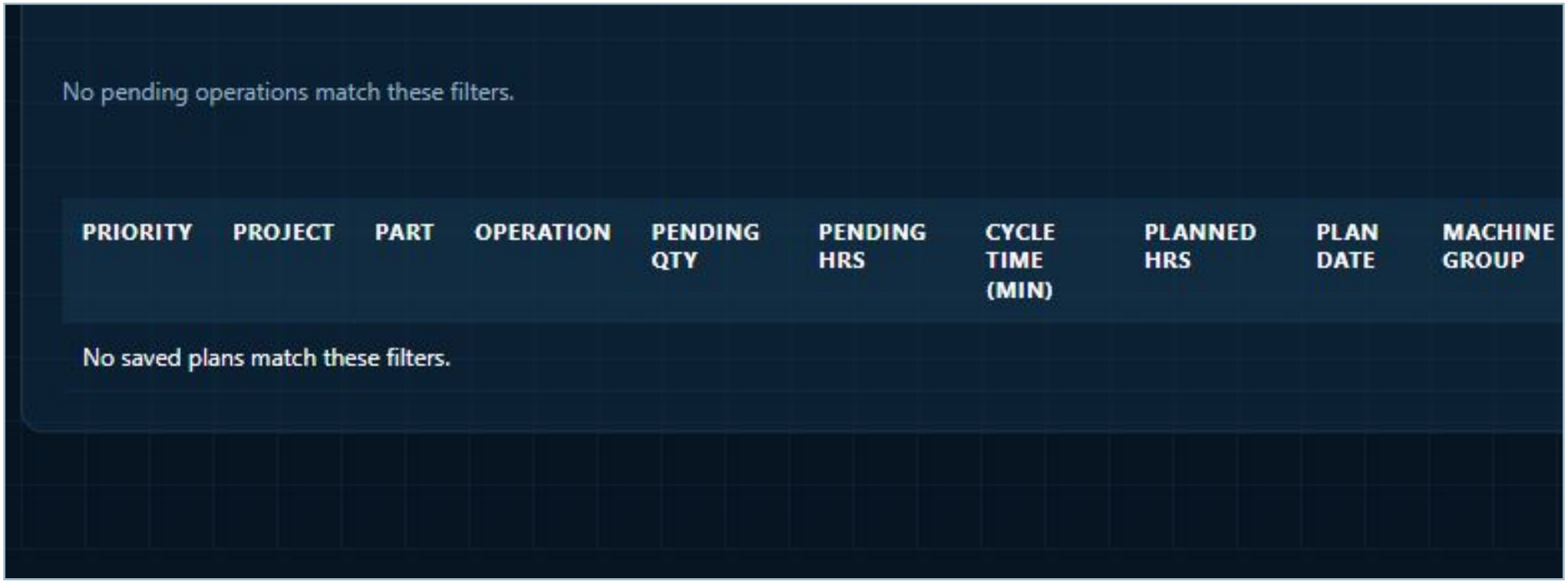
7. SHOW PLANNING
Apply the selected filters and refresh the displayed results

8. RESET
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 10 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Illustrated detail 11 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

17 PF Process planning

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
PF PROCESS PLANNING	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Expand Process Planning	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEW PROCESS PLAN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PRIORITY NO	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
PROJECT NO	Choose the required value. Available choices: Select Project No. The displayed records follow this screen's scope and account access.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SAVE PLAN	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
CLEAR	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
PROJECT PARTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Search part names	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
New part name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
+ ADD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MACHINE AVAILABILITY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
From	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.

To	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Machine Group All groups CNC Milling CNC Turning Convention EDM Store Keeper WIRE-CUT	Choose the required value. Available choices: All groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen's scope and account access.
Machine All machines CNC Milling MC-01 CNC Turning TM-01 Band Saw EDM-01 Wire Cut WC-01	Choose the required value. Available choices: All machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
SHOW AVAILABILITY	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
CNC Milling – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CNC Turning – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Convention – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EDM – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
WIRE-CUT – 05:00 Hrs 1 machine + / –	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
IMPORT / EXPORT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Process plan CSV	Choose the appropriate file from this PC, then use the corresponding upload/add action.
IMPORT CSV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CSV TEMPLATE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EXPORT CSV	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

SAVED PF PLANS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Planned Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Project Filter	Choose the required value. Available choices: All Projects. The displayed records follow this screen’s scope and account access.
Group Filter	Choose the required value. Available choices: All Groups; CNC Milling; CNC Turning; Convention; EDM; Store Keeper; WIRE-CUT. The displayed records follow this screen’s scope and account access.
Machine Filter	Choose the required value. Available choices: All Machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen’s scope and account access.
Part	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Status Filter	Choose the required value. Available choices: All Statuses; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen’s scope and account access.
SHOW PLANNING	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
RESET	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.

18 Machine availability and capacity planning

Workflow • read before using the illustrated controls

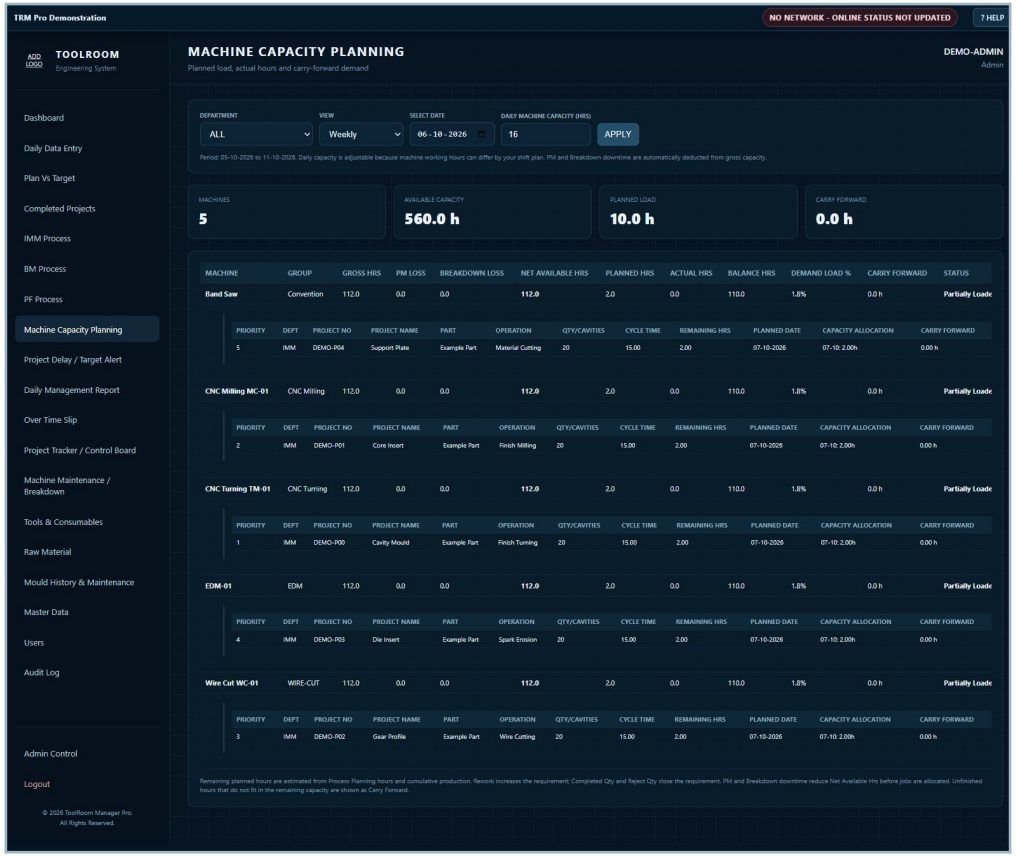
1. Choose the From/To period and available group/machine filters.
2. Refresh the availability/capacity display. Expand a group to see its machine bookings and free gaps.
3. Read Booked, Free, Needs time and Maintenance indicators before assigning an operation.
4. Use the small group hours value for a quick load comparison, then inspect individual machine intervals.

Practical notes

The planning side panel and Machine Capacity Planning report present related but distinct views. Calendar availability is not shift-calendar scheduling. A free interval across nights/weekends should be checked against actual plant working hours.

18 Machine availability and capacity planning

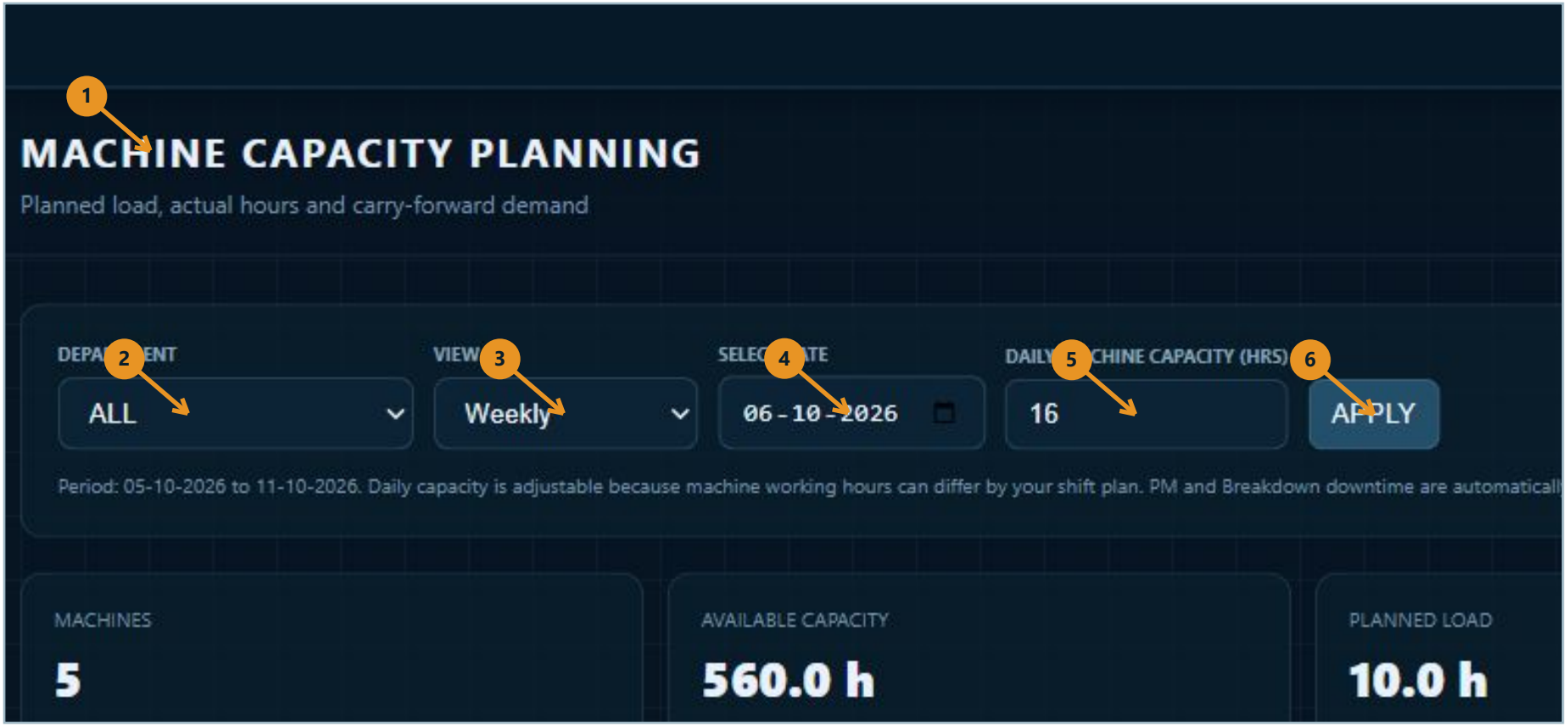
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 01 • orange numbers point to the named controls



1. MACHINE CAPACITY PLANNING
Enter or review this value as labeled

2. Department
Choose the required value

3. Period
Choose the required value

4. SELECT DATE
Select the actual reference date/time for this record or report

5. DAILY MACHINE CAPACITY (HRS)
Enter the numeric quantity/time required by the label

6. APPLY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

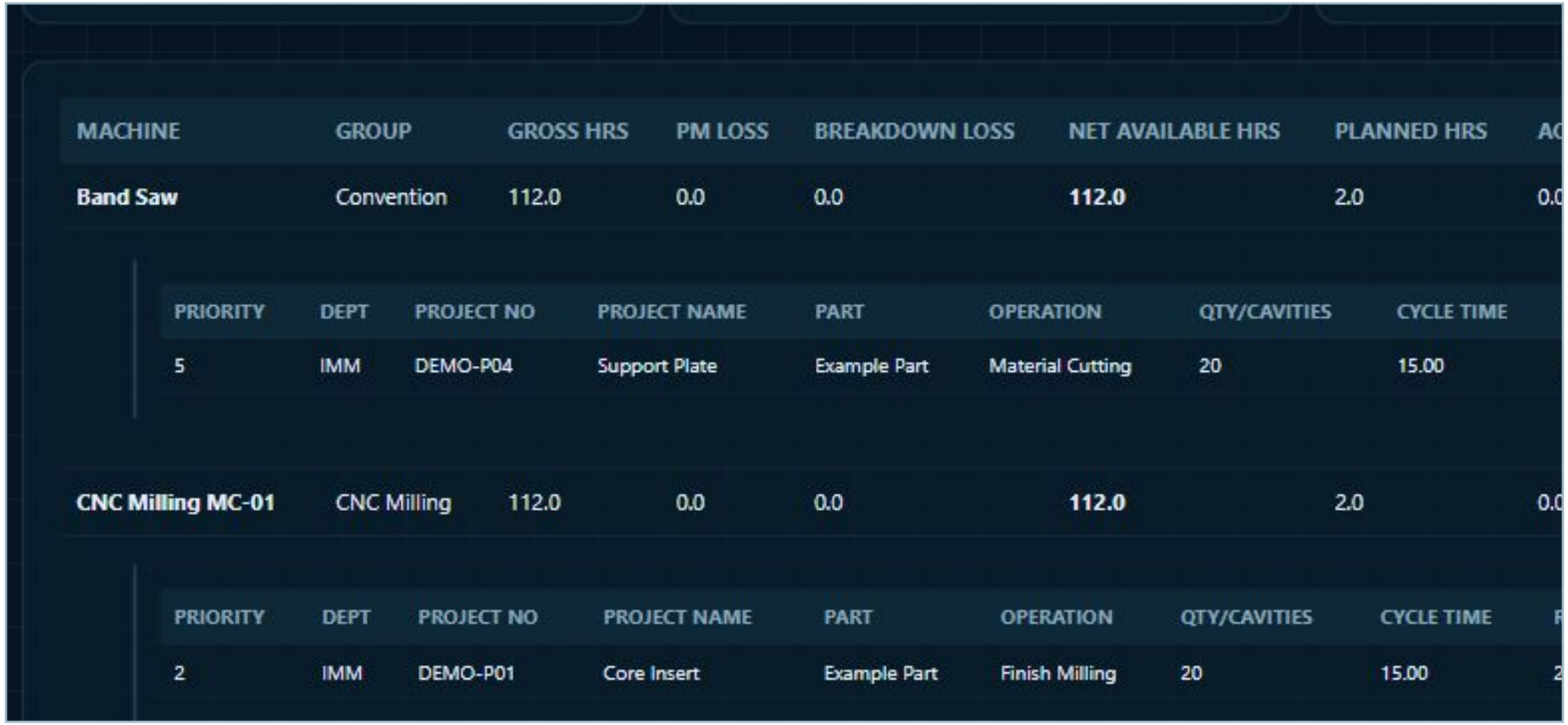
2. DAILY MACHINE CAPACITY (HRS)
Enter the numeric quantity/time required by the label

3. APPLY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 03 • orange numbers point to the named controls



MACHINE	GROUP	GROSS HRS	PM LOSS	BREAKDOWN LOSS	NET AVAILABLE HRS	PLANNED HRS	AC
Band Saw	Convention	112.0	0.0	0.0	**112.0**	2.0	0.0

PRIORITY	DEPT	PROJECT NO	PROJECT NAME	PART	OPERATION	QTY/CAVITIES	CYCLE TIME
5	IMM	DEMO-P04	Support Plate	Example Part	Material Cutting	20	15.00

MACHINE	GROUP	GROSS HRS	PM LOSS	BREAKDOWN LOSS	NET AVAILABLE HRS	PLANNED HRS	AC
CNC Milling MC-01	CNC Milling	112.0	0.0	0.0	**112.0**	2.0	0.0

PRIORITY	DEPT	PROJECT NO	PROJECT NAME	PART	OPERATION	QTY/CAVITIES	CYCLE TIME	F
2	IMM	DEMO-P01	Core Insert	Example Part	Finish Milling	20	15.00	2

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 04 • orange numbers point to the named controls



NET AVAILABLE HRS	PLANNED HRS	ACTUAL HRS	BALANCE HRS	DEMAND LOAD %	CARRY FORWARD	STATUS
112.0	2.0	0.0	110.0	1.8%	0.0 h	Partially Loade

TION	QTY/CAVITIES	CYCLE TIME	REMAINING HRS	PLANNED DATE	CAPACITY ALLOCATION	CARRY FORWARD
l Cutting	20	15.00	2.00	07-10-2026	07-10: 2.00h	0.00 h

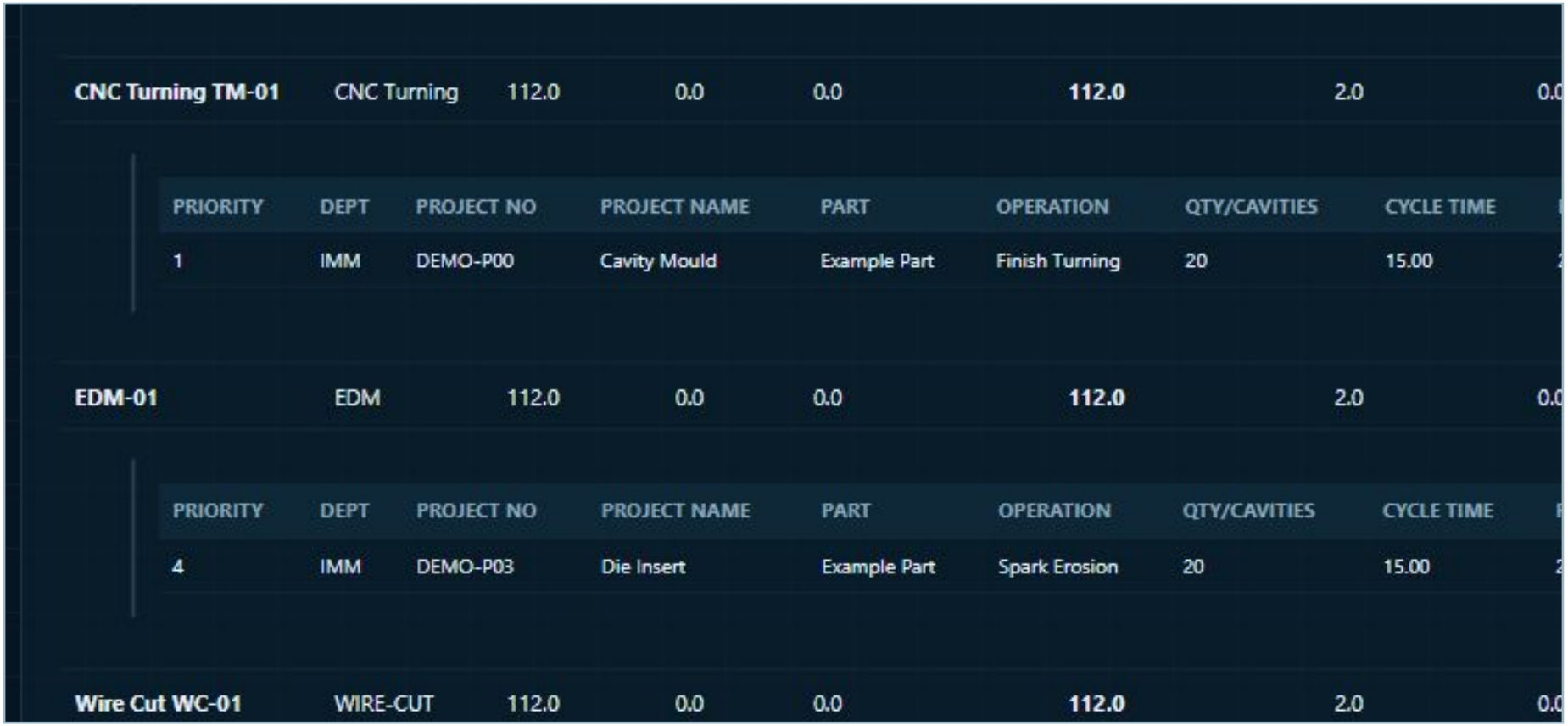
112.0	2.0	0.0	110.0	1.8%	0.0 h	Partially Loade

ATION	QTY/CAVITIES	CYCLE TIME	REMAINING HRS	PLANNED DATE	CAPACITY ALLOCATION	CARRY FORWARD
Milling	20	15.00	2.00	07-10-2026	07-10: 2.00h	0.00 h

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 05 • orange numbers point to the named controls



CNC Turning TM-01	CNC Turning	112.0	0.0	0.0	**112.0**	2.0	0.0

PRIORITY	DEPT	PROJECT NO	PROJECT NAME	PART	OPERATION	QTY/CAVITIES	CYCLE TIME
1	IMM	DEMO-P00	Cavity Mould	Example Part	Finish Turning	20	15.00

EDM-01	EDM	112.0	0.0	0.0	**112.0**	2.0	0.0

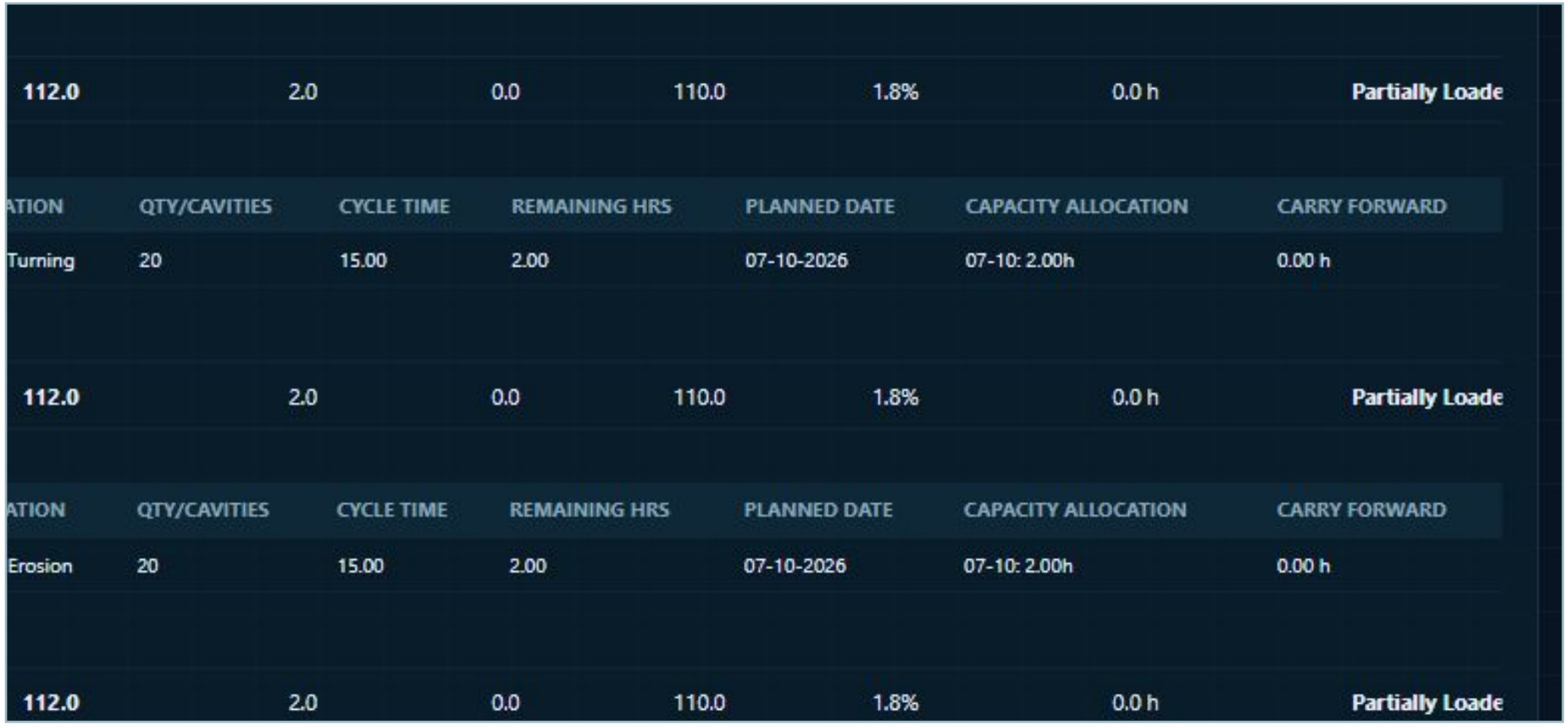
PRIORITY	DEPT	PROJECT NO	PROJECT NAME	PART	OPERATION	QTY/CAVITIES	CYCLE TIME
4	IMM	DEMO-P03	Die Insert	Example Part	Spark Erosion	20	15.00

Wire Cut WC-01	WIRE-CUT	112.0	0.0	0.0	**112.0**	2.0	0.0

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

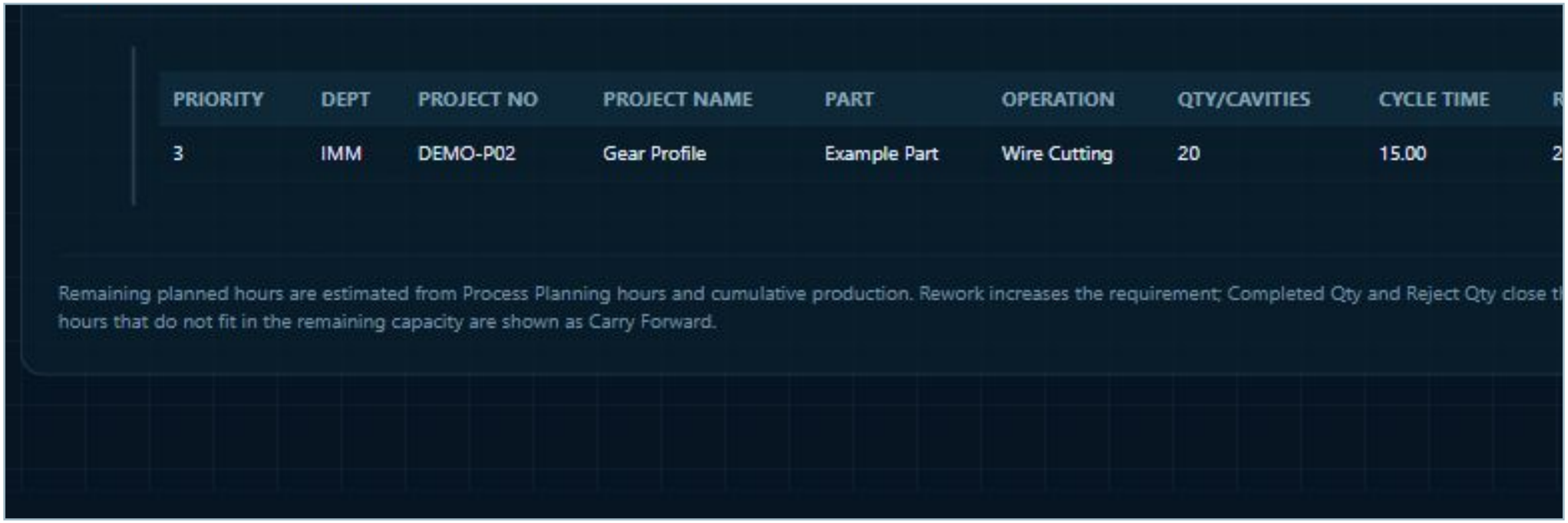
Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 07 • orange numbers point to the named controls



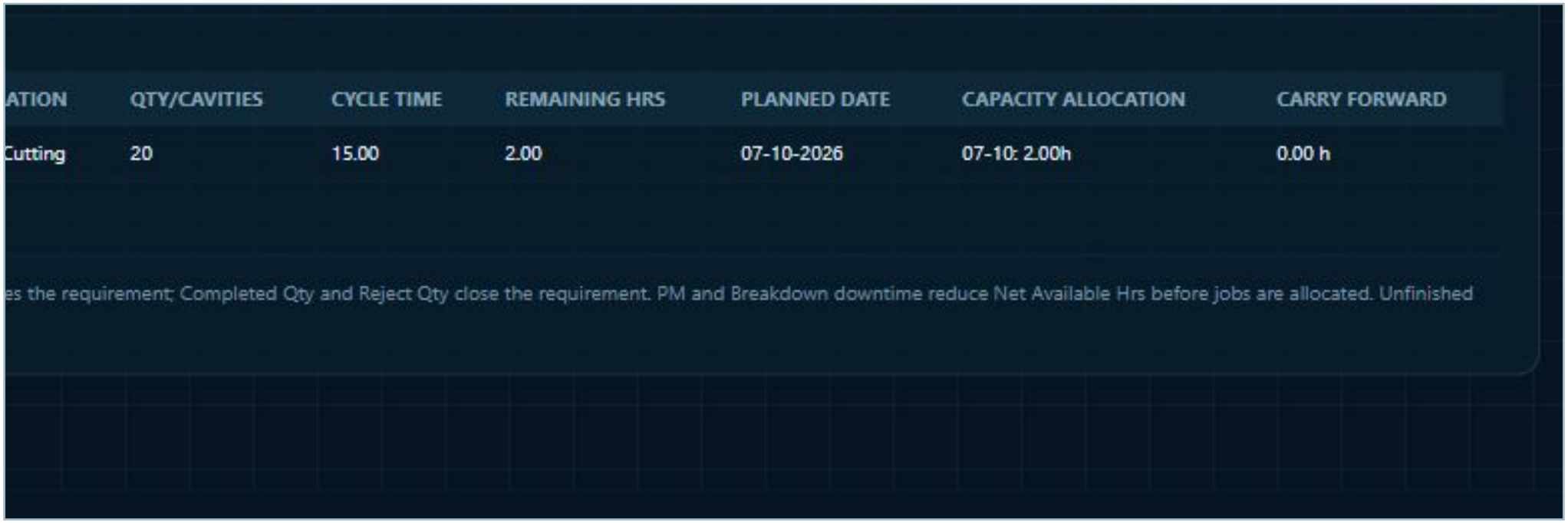
PRIORITY	DEPT	PROJECT NO	PROJECT NAME	PART	OPERATION	QTY/CAVITIES	CYCLE TIME	R
3	IMM	DEMO-P02	Gear Profile	Example Part	Wire Cutting	20	15.00	2

Remaining planned hours are estimated from Process Planning hours and cumulative production. Rework increases the requirement; Completed Qty and Reject Qty close t
hours that do not fit in the remaining capacity are shown as Carry Forward.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Illustrated detail 08 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

18 Machine availability and capacity planning

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MACHINE CAPACITY PLANNING	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Period	Choose the required value. Available choices: Particular Date; Weekly; Monthly. The displayed records follow this screen's scope and account access.
SELECT DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
DAILY MACHINE CAPACITY (HRS)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
APPLY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

19 Daily Data Entry: production and loss time

Workflow • read before using the illustrated controls

1. Choose Date, Department and Machine, then Emp ID. Check the displayed operator name and shift.
2. Choose a scheduled Project No., Part Name and Operation. For a restricted group user, project choices follow the machine group schedule; they are not date-only project choices.
3. Check pending and planned quantities and cycle time. Enter Completed, Rework and Reject quantities accurately.
4. Enter the actual Start Time and End Time for this component. The same operator/machine must not have overlapping production intervals.
5. Record Setting, Waiting Inspection, Power Cut and Idle minutes separately. Give Idle Reason when Idle Time is greater than zero. Review total/utilisation hours and the ±30-minute tolerance message.
6. Enter remarks, then SAVE DAILY ENTRY. In SAVED DAILY ENTRIES choose date/machine and VIEW; use authorized edit/delete actions to correct errors.

Worked example

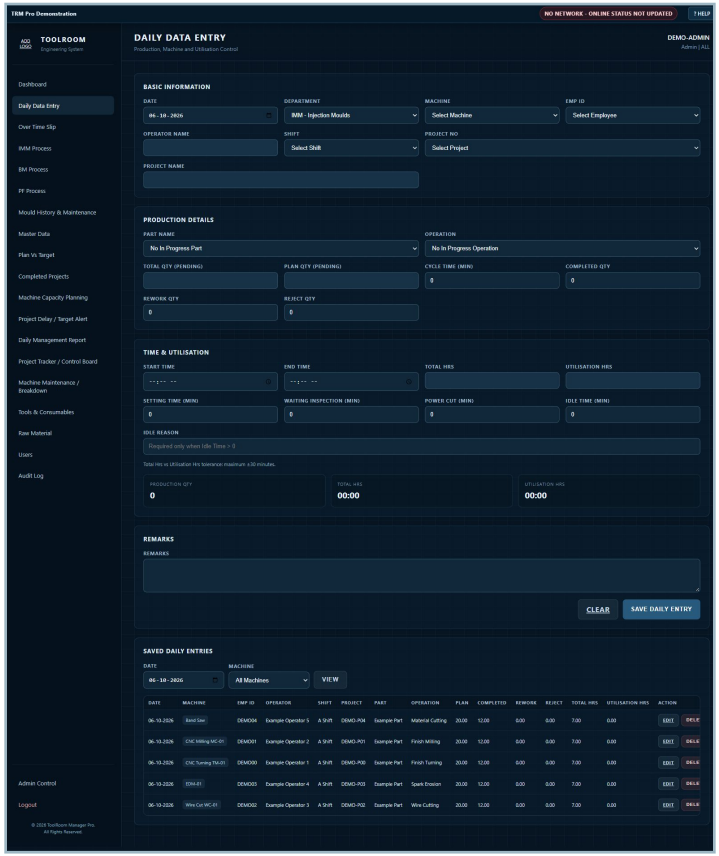
TM-01, same operator: component A 07:00–10:00; component B 10:00–15:00. Do not enter B as 07:00–15:00 because that overlaps A. A full A shift gives 7 paid hours after the one-hour break.

Practical notes

Do not sum overlapping records as genuine worked time. Correct the underlying intervals. Cycle-time effective hours are a separate measure from clock worked hours. An output mismatch should be investigated rather than hidden by invented loss values.

19 Daily Data Entry: production and loss time

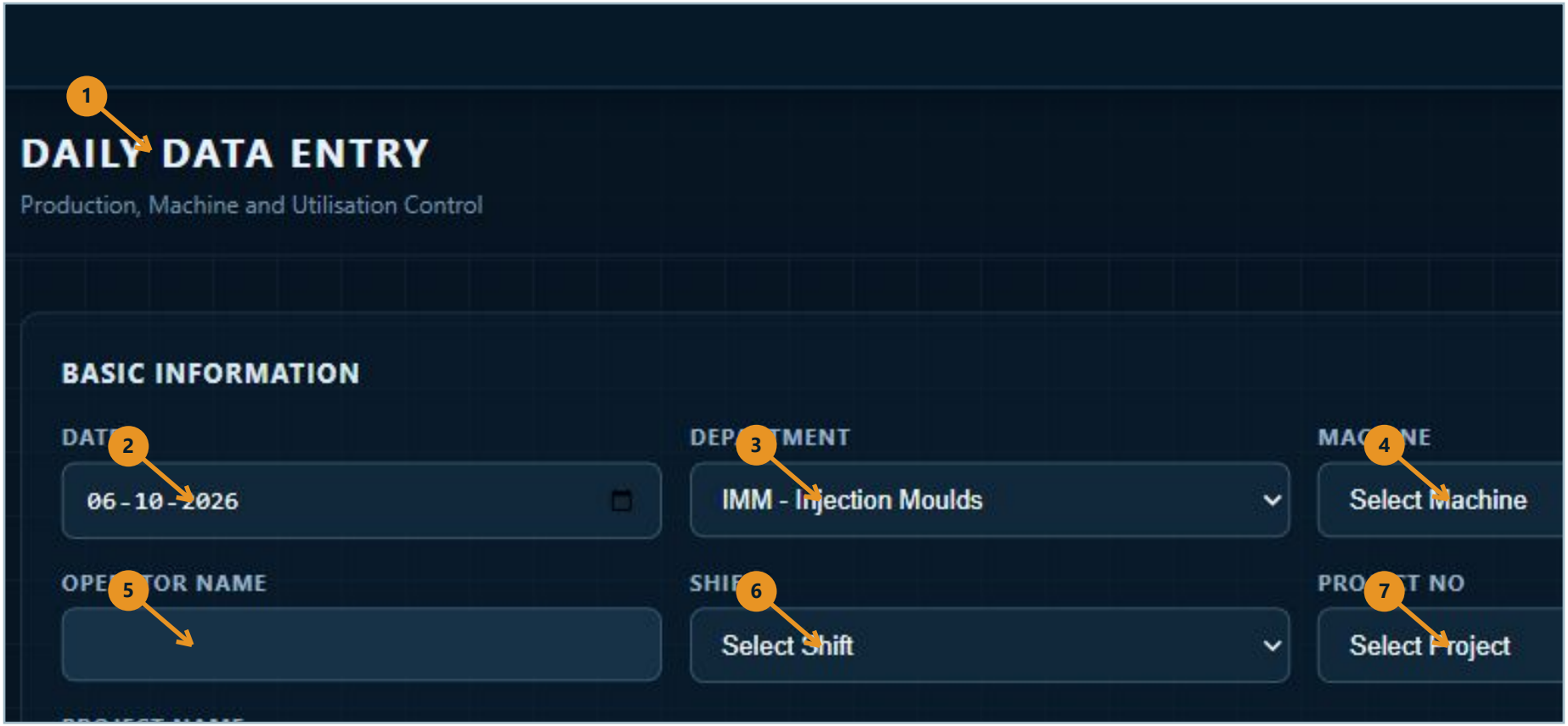
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 01 • orange numbers point to the named controls



1. DAILY DATA ENTRY
Enter or review this value as labeled

2. DATE
Select the actual reference date/time for this record or report

3. Department
Choose the required value

4. Machine
Choose the required value

5. OPERATOR NAME
Enter or review this value as labeled

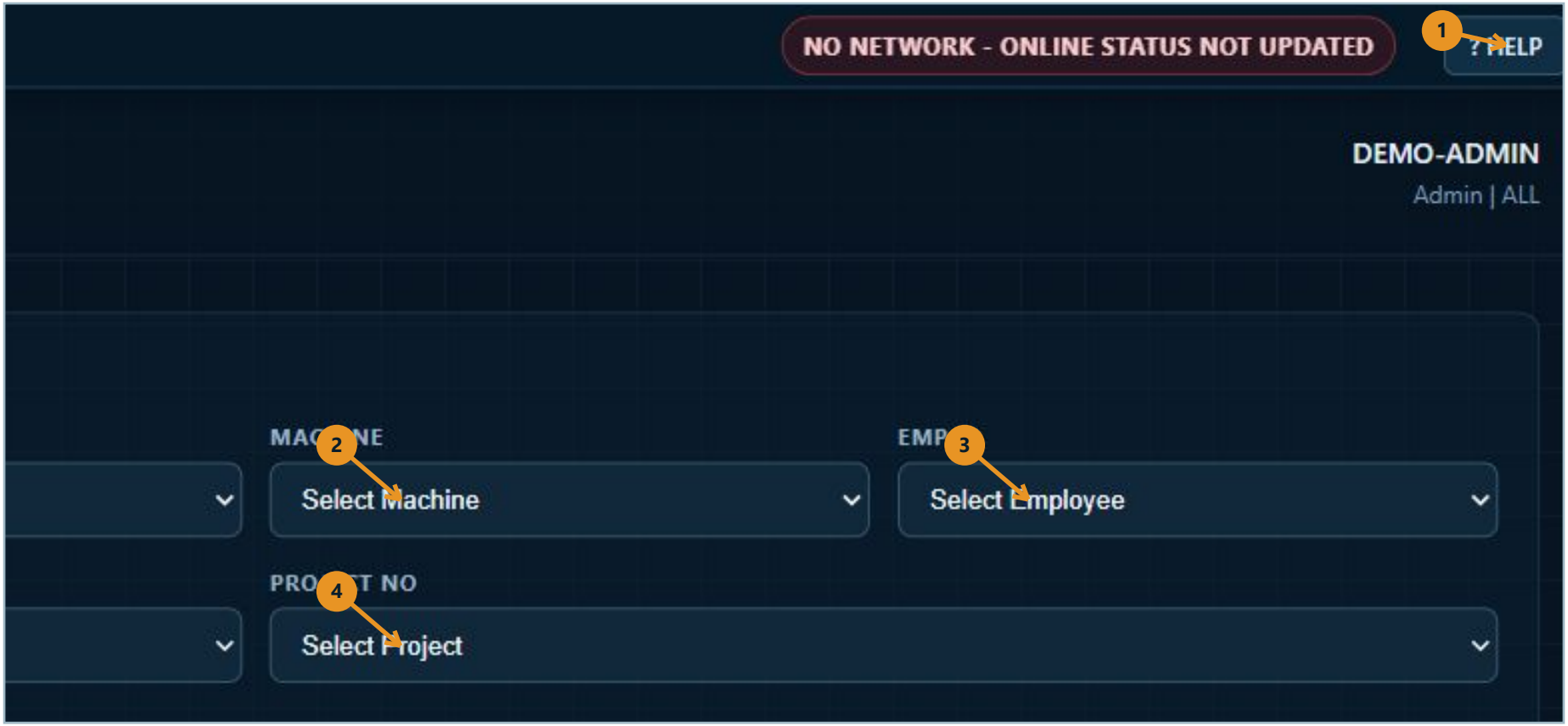
6. Shift
Choose the required value

7. Project No
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. Machine
Choose the required value

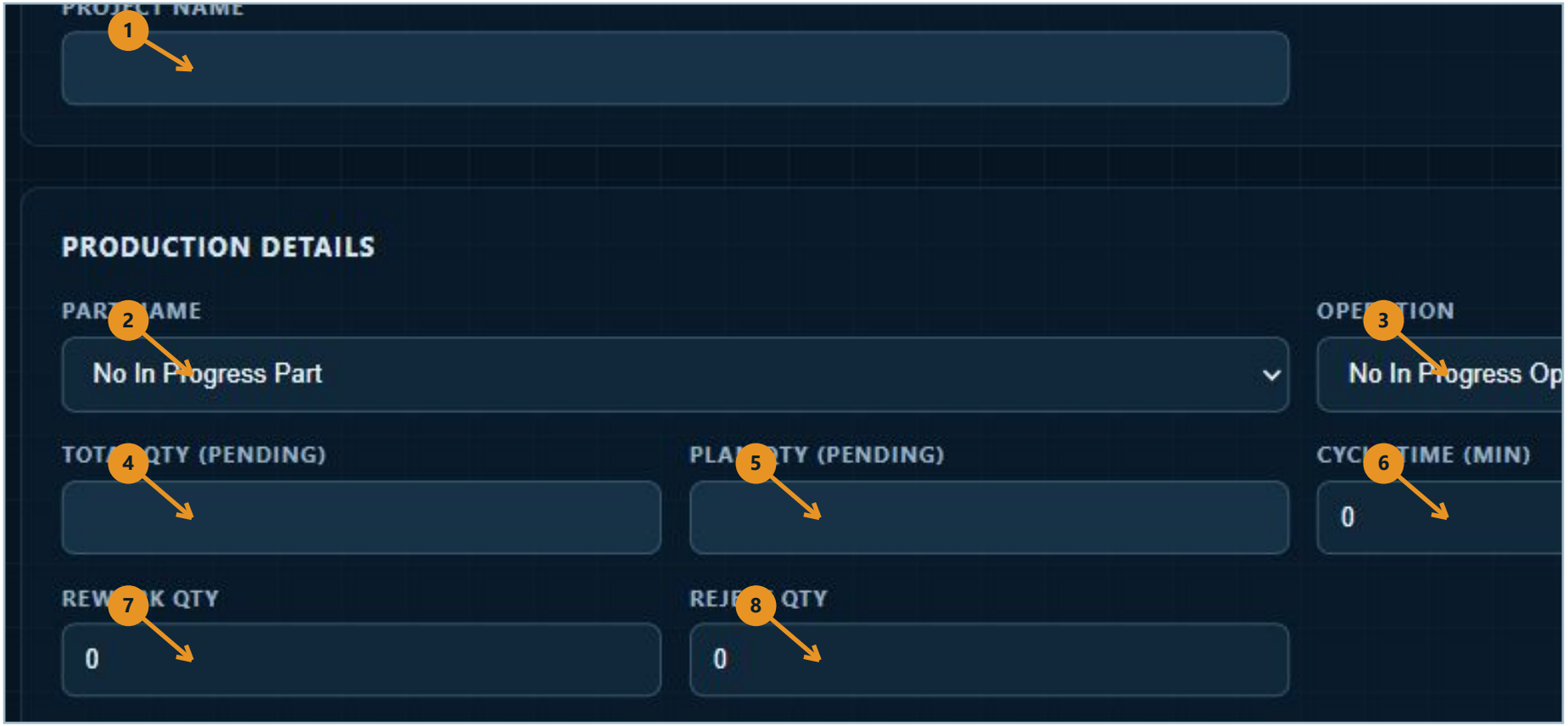
3. Employee
Choose the required value

4. Project No
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 03 • orange numbers point to the named controls



1. PROJECT NAME
Enter or review this value as labeled

2. Part Name
Choose the required value

3. Operation
Choose the required value

4. TOTAL QTY (PENDING)
Enter the numeric quantity/time required by the label

5. PLAN QTY (PENDING)
Enter the numeric quantity/time required by the label

6. CYCLE TIME (MIN)
Enter the numeric quantity/time required by the label

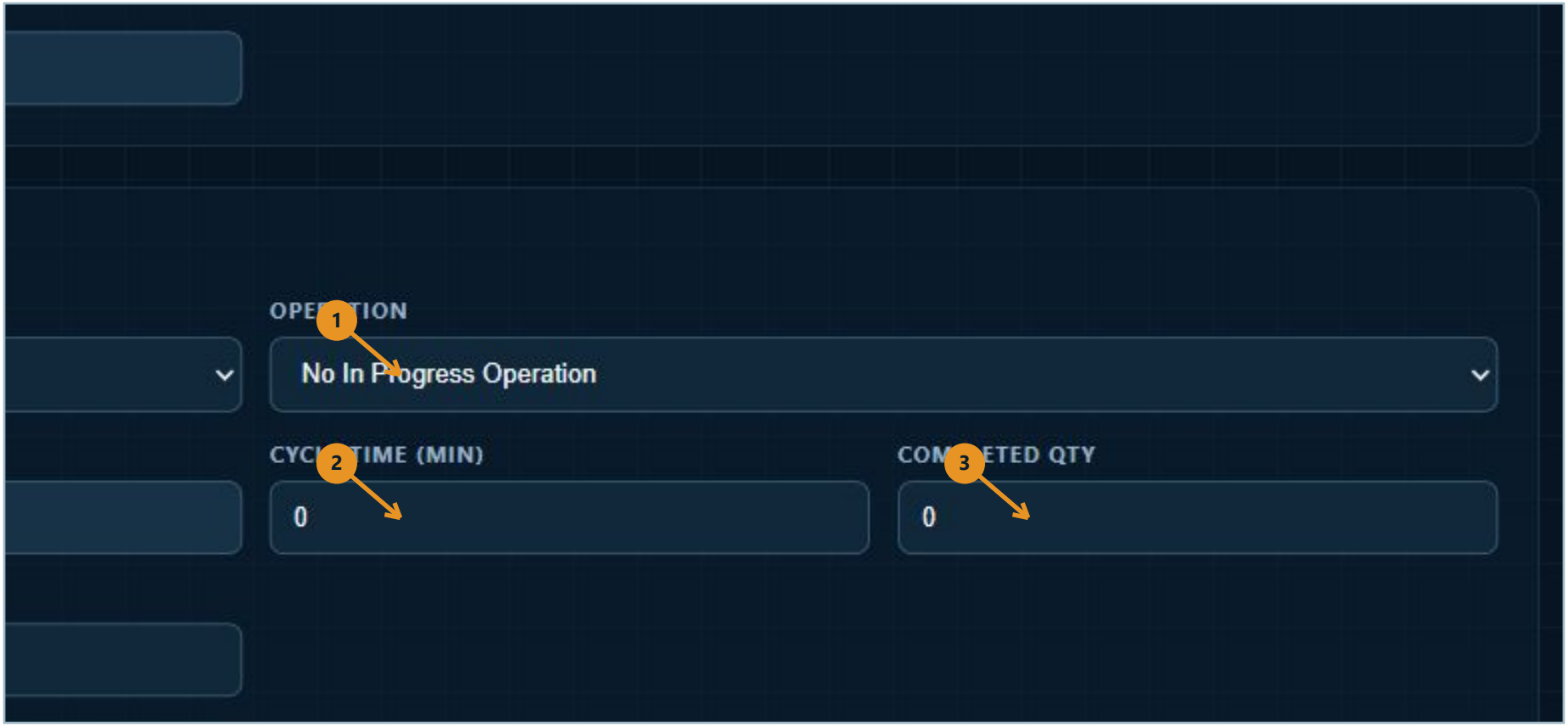
7. REWORK QTY
Enter the numeric quantity/time required by the label

8. REJECT QTY
Enter the numeric quantity/time required by the label

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 04 • orange numbers point to the named controls



1. Operation
Choose the required value

2. CYCLE TIME (MIN)
Enter the numeric quantity/time required by the label

3. COMPLETED QTY
Enter the numeric quantity/time required by the label

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 05 • orange numbers point to the named controls



1. START TIME
Select the actual reference date/time for this record or report

2. END TIME
Select the actual reference date/time for this record or report

3. TOTAL HRS
Enter or review this value as labeled

4. SETTING TIME (MIN)
Enter the numeric quantity/time required by the label

5. WAITING INSPECTION (MIN)
Enter the numeric quantity/time required by the label

6. POWER CUT (MIN)
Enter the numeric quantity/time required by the label

7. IDLE REASON
Explain the actual cause

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 06 • orange numbers point to the named controls



1. TOTAL HRS
Enter or review this value as labeled

2. UTILISATION HRS
Enter or review this value as labeled

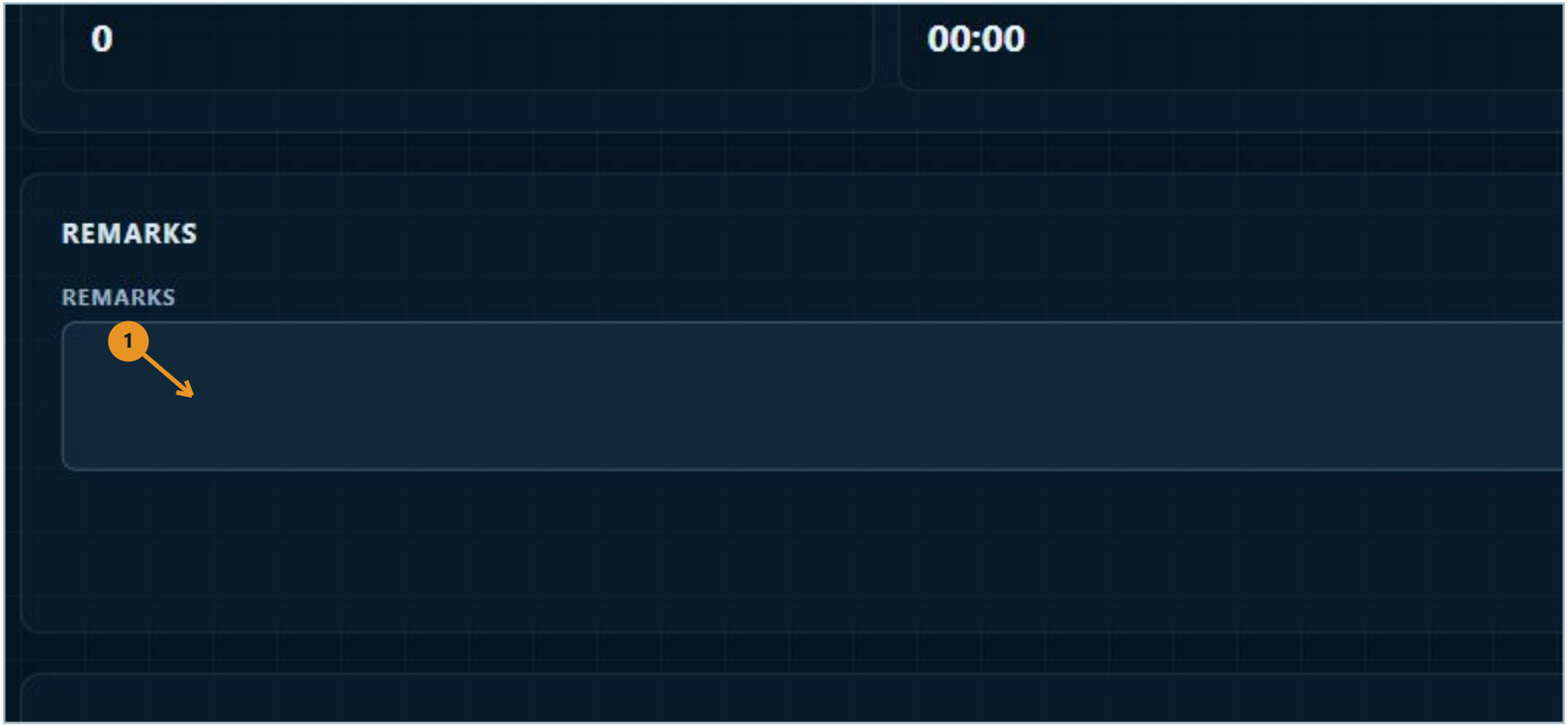
3. POWER CUT (MIN)
Enter the numeric quantity/time required by the label

4. IDLE TIME (MIN)
Enter the numeric quantity/time required by the label

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 07 • orange numbers point to the named controls

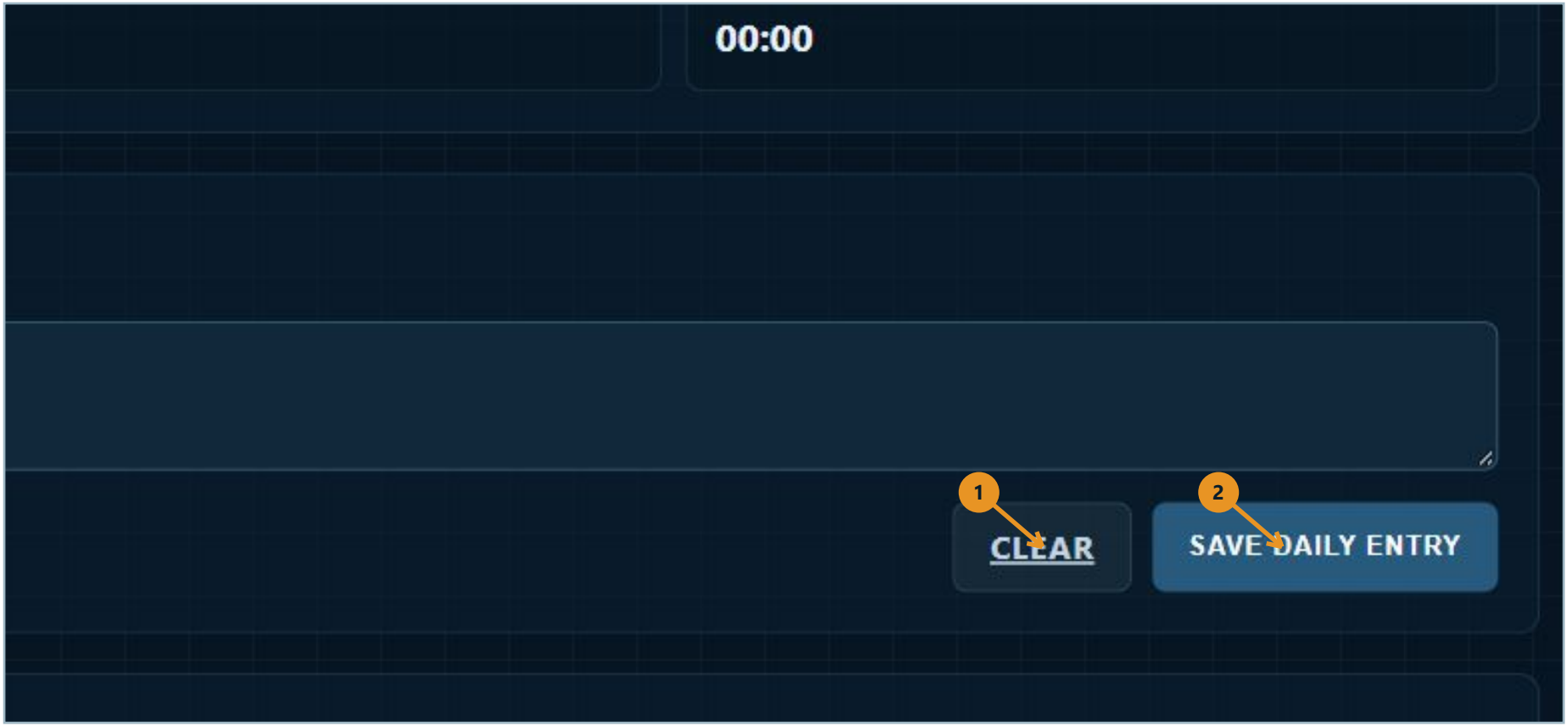


1. REMARKS
Record meaningful instructions or explanation

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 08 • orange numbers point to the named controls



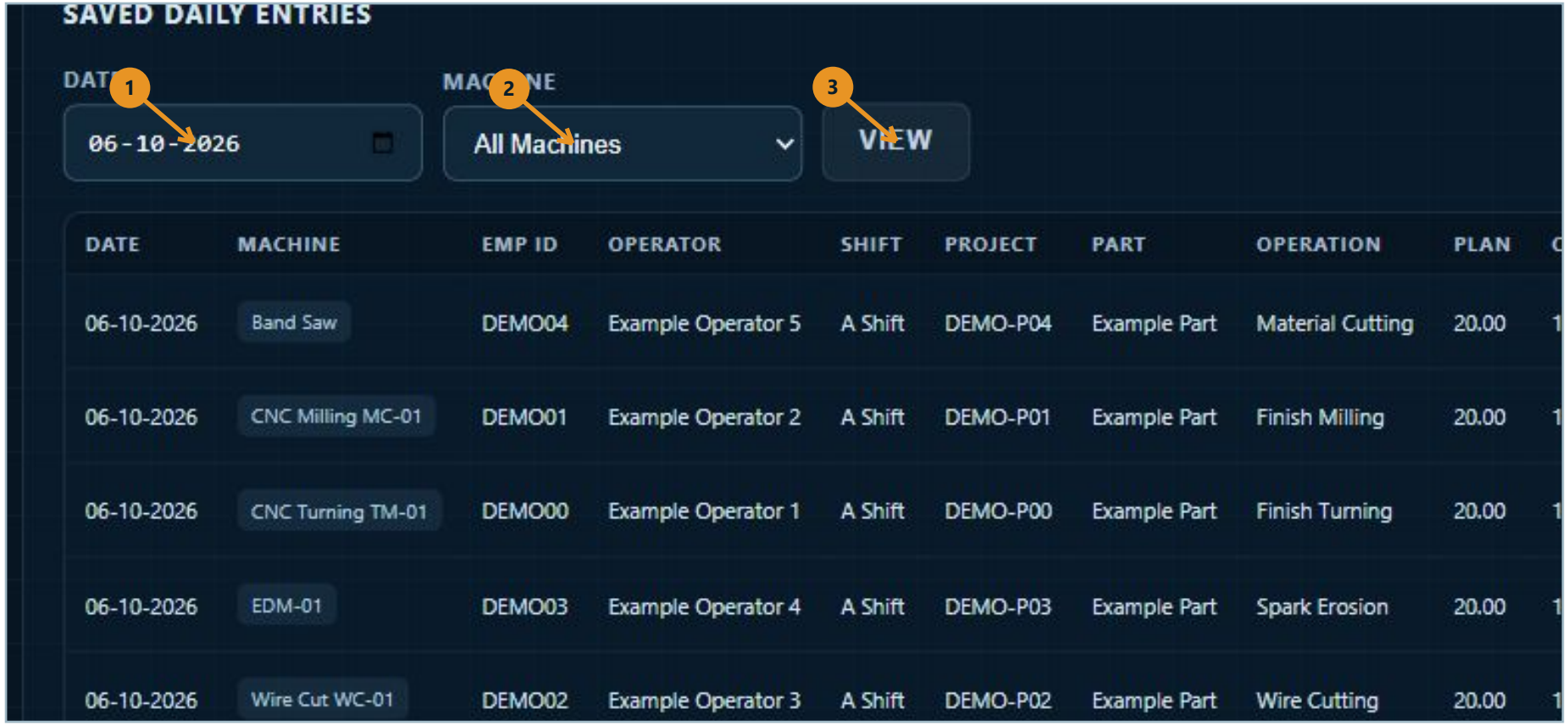
1. CLEAR
Clear the current draft/checks or reset the filter as indicated

2. SAVE DAILY ENTRY
Commit the reviewed fields for this form

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 09 • orange numbers point to the named controls



1. DATE
Select the actual reference date/time for this record or report

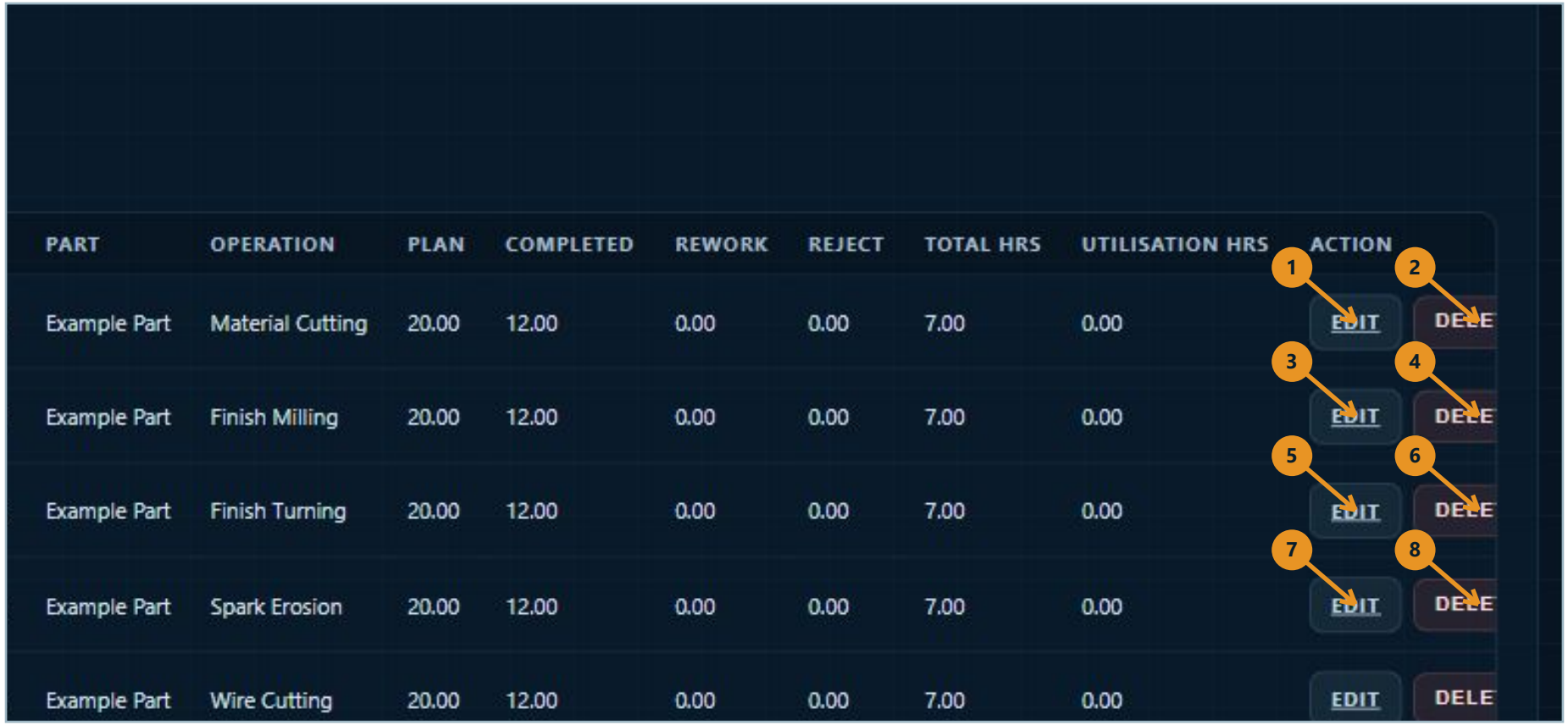
2. Machine
Choose the required value

3. VIEW
Apply the selected filters and refresh the displayed results

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 10 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DELETE
Remove the selected record/attachment only with authorization

3. EDIT
Open the selected saved record for correction

4. DELETE
Remove the selected record/attachment only with authorization

5. EDIT
Open the selected saved record for correction

6. DELETE
Remove the selected record/attachment only with authorization

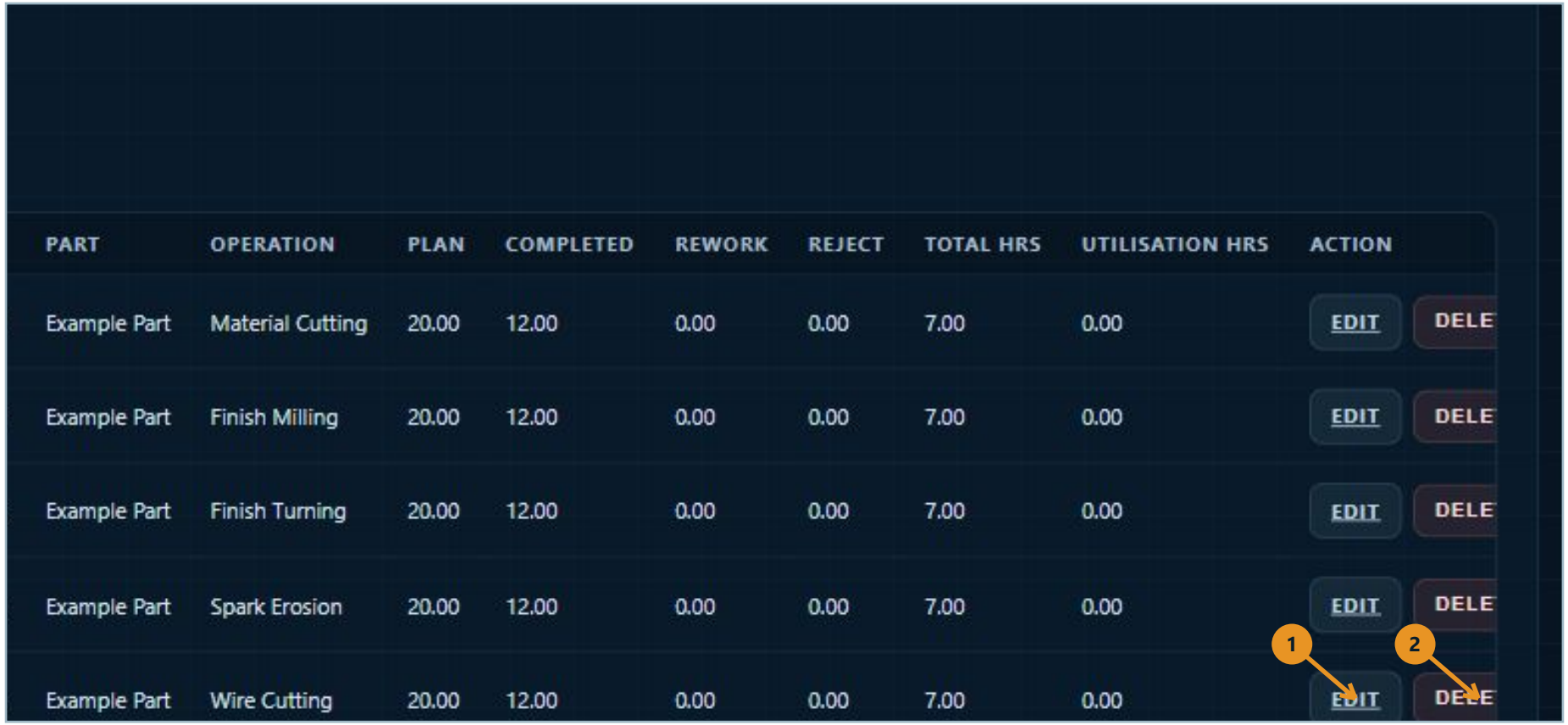
7. EDIT
Open the selected saved record for correction

8. DELETE
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Illustrated detail 11 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DELETE
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

19 Daily Data Entry: production and loss time

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
DAILY DATA ENTRY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Department	Choose the required value. Available choices: IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Machine	Choose the required value. Available choices: Select Machine; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
Employee	Choose the required value. Available choices: Select Employee. The displayed records follow this screen's scope and account access.
OPERATOR NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Shift	Choose the required value. Available choices: Select Shift; A Shift; B Shift; C Shift; G Shift; DAY; NIGHT. The displayed records follow this screen's scope and account access.
Project No	Choose the required value. Available choices: Select Project. The displayed records follow this screen's scope and account access.
PROJECT NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Part Name	Choose the required value. Available choices: No In Progress Part. The displayed records follow this screen's scope and account access.
Operation	Choose the required value. Available choices: No In Progress Operation. The displayed records follow this screen's scope and account access.
TOTAL QTY (PENDING)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
PLAN QTY (PENDING)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.

CYCLE TIME (MIN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
COMPLETED QTY	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
REWORK QTY	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
REJECT QTY	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
START TIME	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
END TIME	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
TOTAL HRS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
UTILISATION HRS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SETTING TIME (MIN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
WAITING INSPECTION (MIN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
POWER CUT (MIN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
IDLE TIME (MIN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
IDLE REASON	Explain the actual cause. Idle Reason is required when Idle Time is greater than zero.
REMARKS	Record meaningful instructions or explanation. Do not use remarks to replace the correct numeric fields.
CLEAR	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
SAVE DAILY ENTRY	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.

Machine	Choose the required value. Available choices: All Machines; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.
VIEW	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DELETE	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.

20 Over Time Slip

Workflow • read before using the illustrated controls

1. All Employees is the default. Choose one employee when a personal statement is needed.
2. Choose View (daily/weekly/monthly) and Date, then VIEW. Tick the zero-OT exclusion option when rows with OT = 0 should be omitted.
3. Review employee identity, slip identification, machine/project/part, quantity, cycle time, start/end, worked/effective/OT hours and remarks.
4. EXPORT PDF produces the statement with company heading, export date and signatures for Operator, Section In-charge and GM-ToolRoom.
5. Check OT eligibility in Master Data > Employees before approving the statement. Zero loss values are omitted from remarks.

Worked example

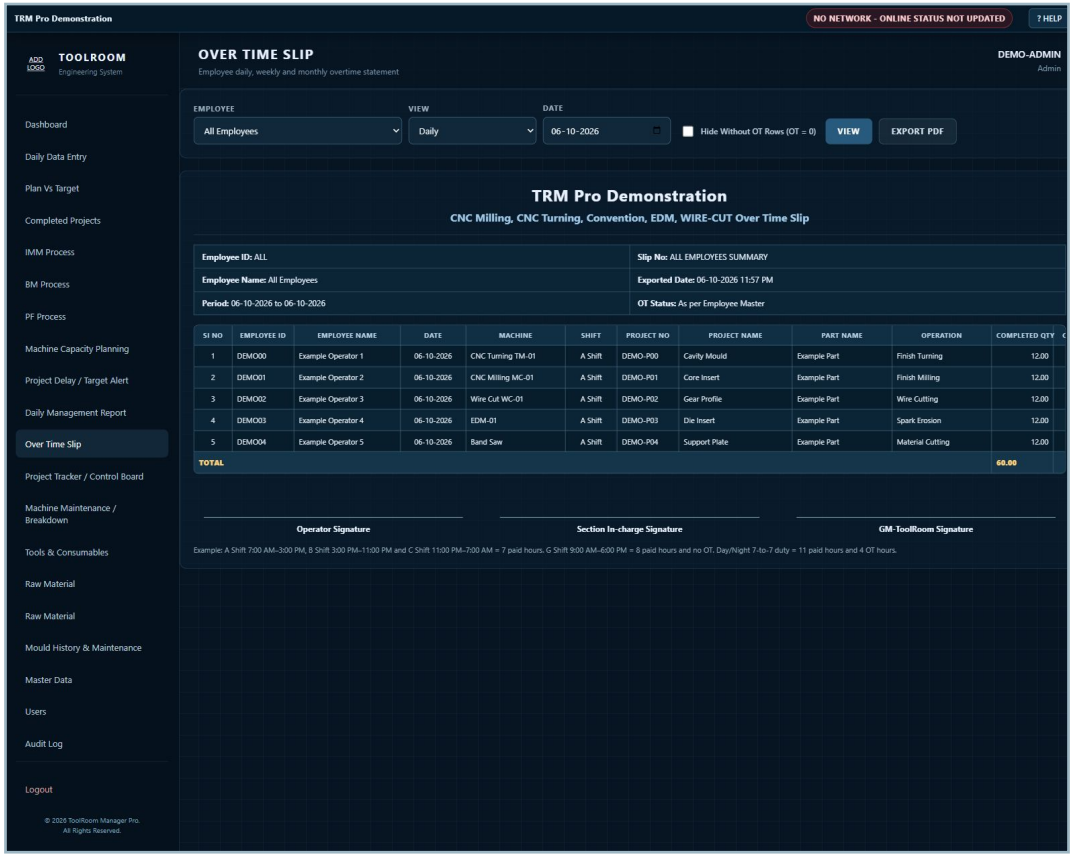
A 07:00–15:00, B 15:00–23:00 and C 23:00–07:00 each give 7 paid hours. Day/Night 7-to-7 gives 11 paid hours and 4 OT hours. G Shift 09:00–18:00 gives 8 paid hours and no OT.

Practical notes

Each issued slip has a nonduplicate identification number. The monthly total combines the selected records; it does not create OT for a G Shift. Do not use the slip to approve overlapping daily time entries.

20 Over Time Slip

Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Illustrated detail 01 • orange numbers point to the named controls



1. OVER TIME SLIP
Enter or review this value as labeled

2. Employee
Choose the required value

3. Period
Choose the required value

4. DATE
Select the actual reference date/time for this record or report

5. Hide Without OT Rows (OT = 0)
Tick to enable this option; clear to disable it

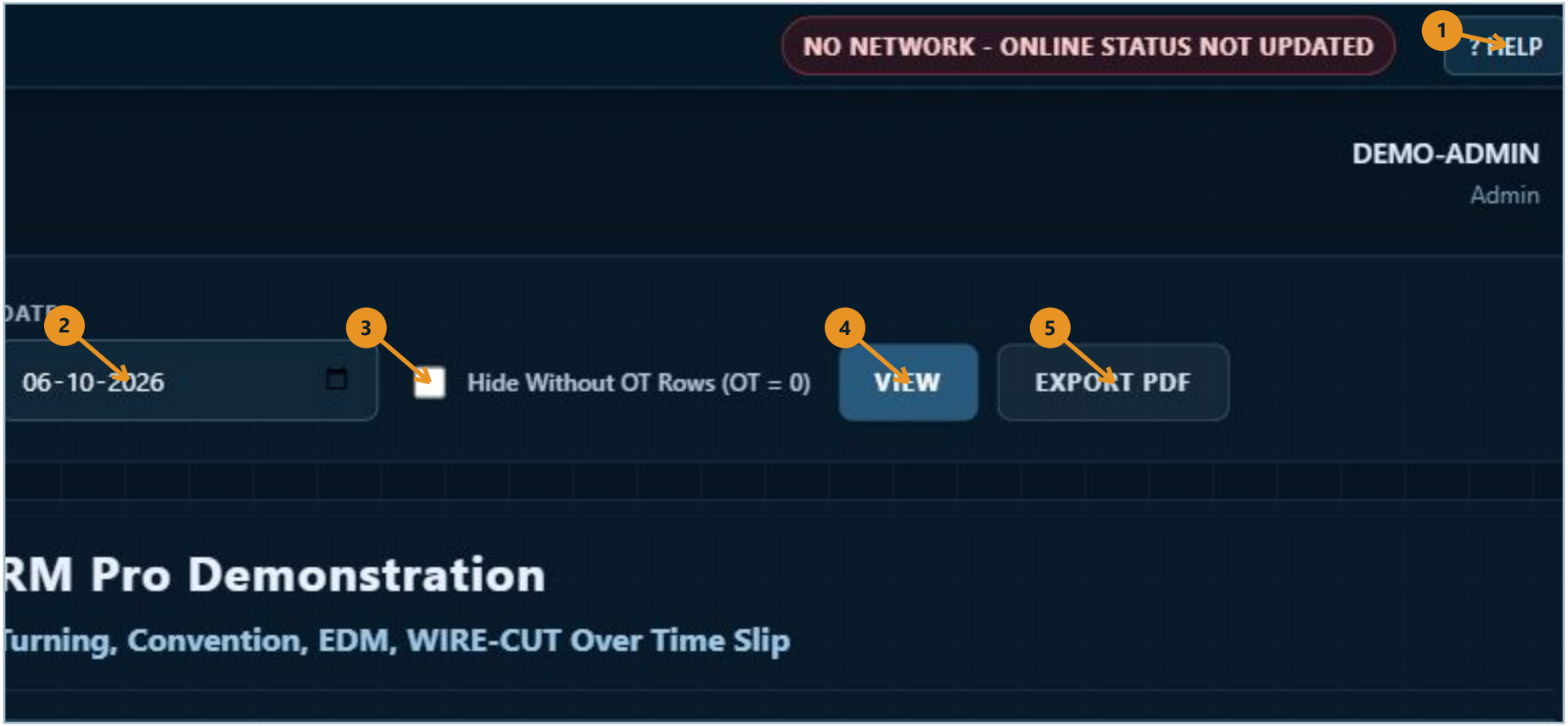
6. TRM Pro Demonstration
Read this section heading before using the controls below it.

7. CNC Milling, CNC Turning, Convention, EDM, WIRE-CUT Over Tim
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. DATE
Select the actual reference date/time for this record or report

3. Hide Without OT Rows (OT = 0)
Tick to enable this option; clear to disable it

4. Hide Without OT Rows (OT = 0)
Use this named action/tab for the workflow described in this chapter

5. EXPORT PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Illustrated detail 03 • orange numbers point to the named controls

Employee ID: ALL | **Slip No:** ALL EMPLOYE

Employee Name: All Employees | **Exported Date:** 06-10

Period: 06-10-2026 to 06-10-2026 | **OT Status:** As per Emp

SI NO	EMPLOYEE ID	EMPLOYEE NAME	DATE	MACHINE	SHIFT	PROJECT NO	PR
1	DEMO00	Example Operator 1	06-10-2026	CNC Turning TM-01	A Shift	DEMO-P00	Cavity Mo
2	DEMO01	Example Operator 2	06-10-2026	CNC Milling MC-01	A Shift	DEMO-P01	Core Inser
3	DEMO02	Example Operator 3	06-10-2026	Wire Cut WC-01	A Shift	DEMO-P02	Gear Profi
4	DEMO03	Example Operator 4	06-10-2026	EDM-01	A Shift	DEMO-P03	Die Insert
5	DEMO04	Example Operator 5	06-10-2026	Band Saw	A Shift	DEMO-P04	Support P

TOTAL

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Illustrated detail 04 • orange numbers point to the named controls



Slip No: ALL EMPLOYEES SUMMARY

Exported Date: 06-10-2026 11:57 PM

OT Status: As per Employee Master

SHIFT	PROJECT NO	PROJECT NAME	PART NAME	OPERATION	COMPLETED QTY
A Shift	DEMO-P00	Cavity Mould	Example Part	Finish Turning	12.00
A Shift	DEMO-P01	Core Insert	Example Part	Finish Milling	12.00
A Shift	DEMO-P02	Gear Profile	Example Part	Wire Cutting	12.00
A Shift	DEMO-P03	Die Insert	Example Part	Spark Erosion	12.00
A Shift	DEMO-P04	Support Plate	Example Part	Material Cutting	12.00
					60.00

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

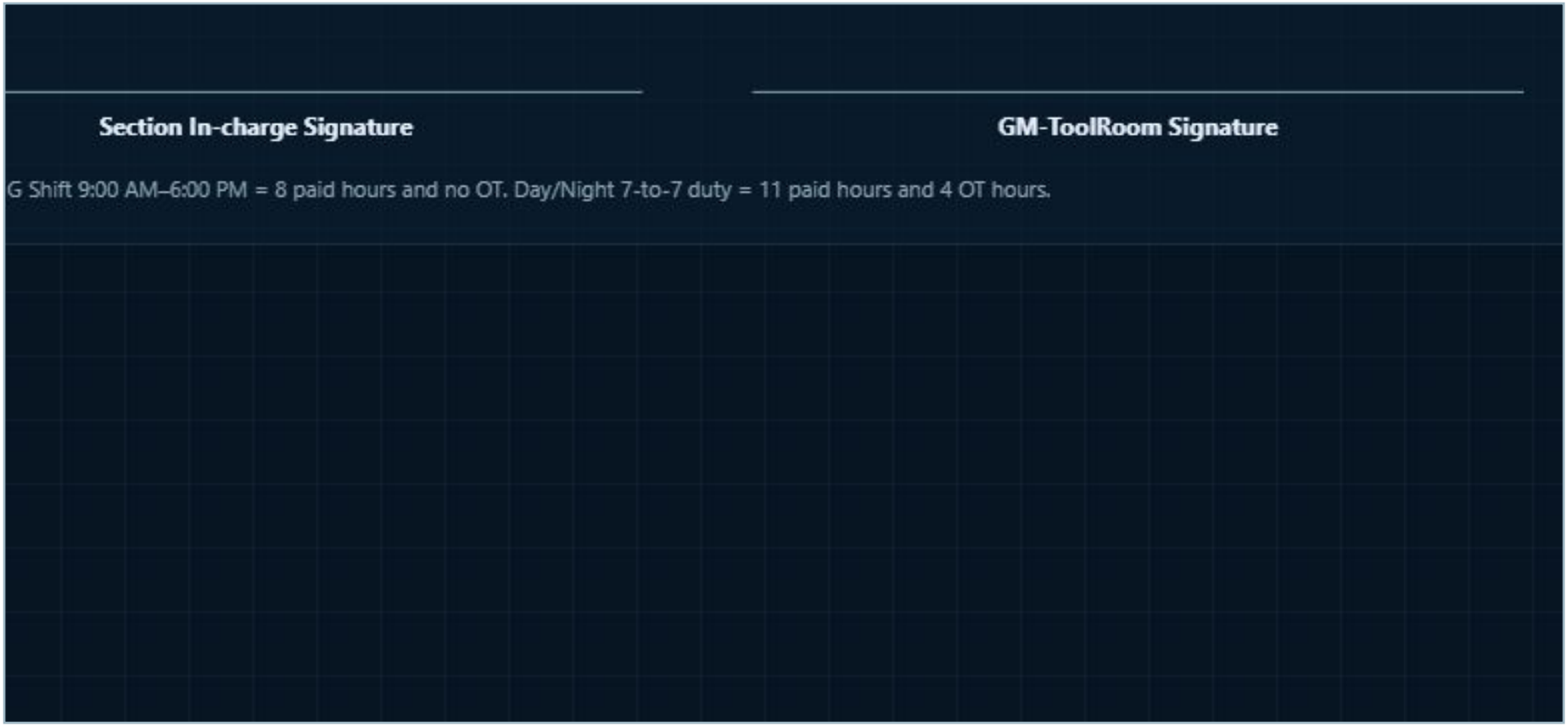
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

20 Over Time Slip

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
OVER TIME SLIP	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Employee	Choose the required value. Available choices: Select Employee; All Employees. The displayed records follow this screen's scope and account access.
Period	Choose the required value. Available choices: Daily; Weekly; Monthly. The displayed records follow this screen's scope and account access.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Hide Without OT Rows (OT = 0)	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Hide Without OT Rows (OT = 0)	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
EXPORT PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

21 Plan Vs Target

Workflow • read before using the illustrated controls

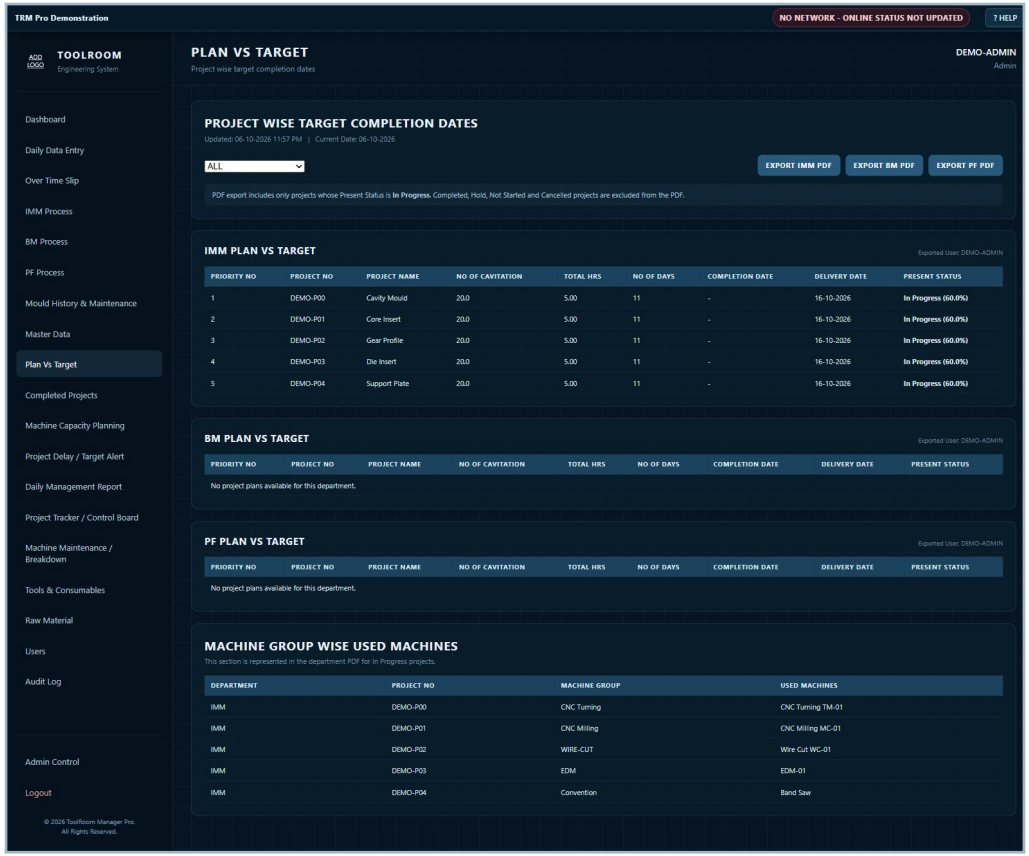
1. Choose the displayed scope filters and refresh the view.
2. Compare planned/target and completed quantities, pending work and dates.
3. Investigate gaps in the source plan and daily records before changing targets.
4. Use the export action where available and permitted.

Practical notes

Project progress can be cumulative while production reports are limited to the selected period. Compare like scopes when checking totals.

21 Plan Vs Target

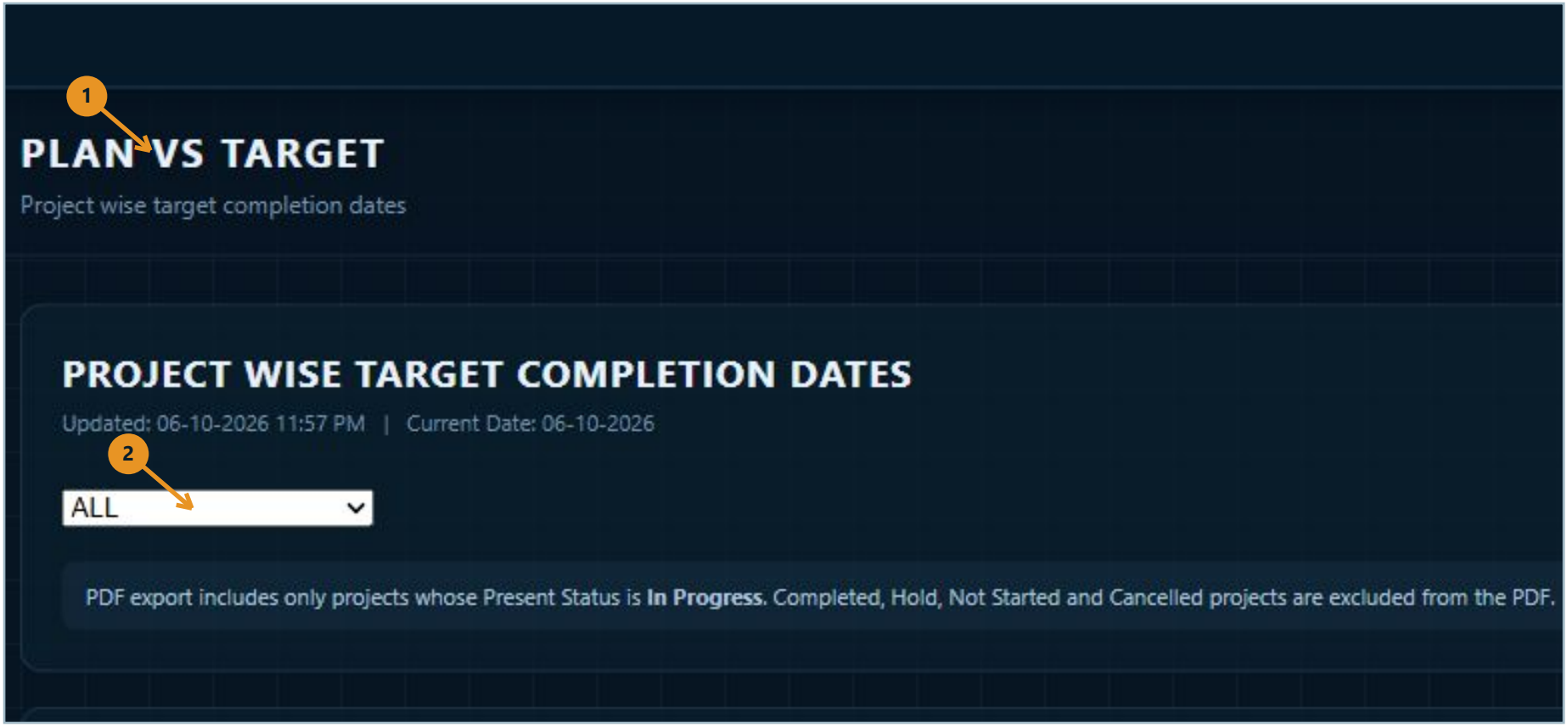
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Illustrated detail 01 • orange numbers point to the named controls



1. PLAN VS TARGET
Enter or review this value as labeled

2. Department
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. EXPORT IMM PDF
Export the current report/stock scope in the indicated format

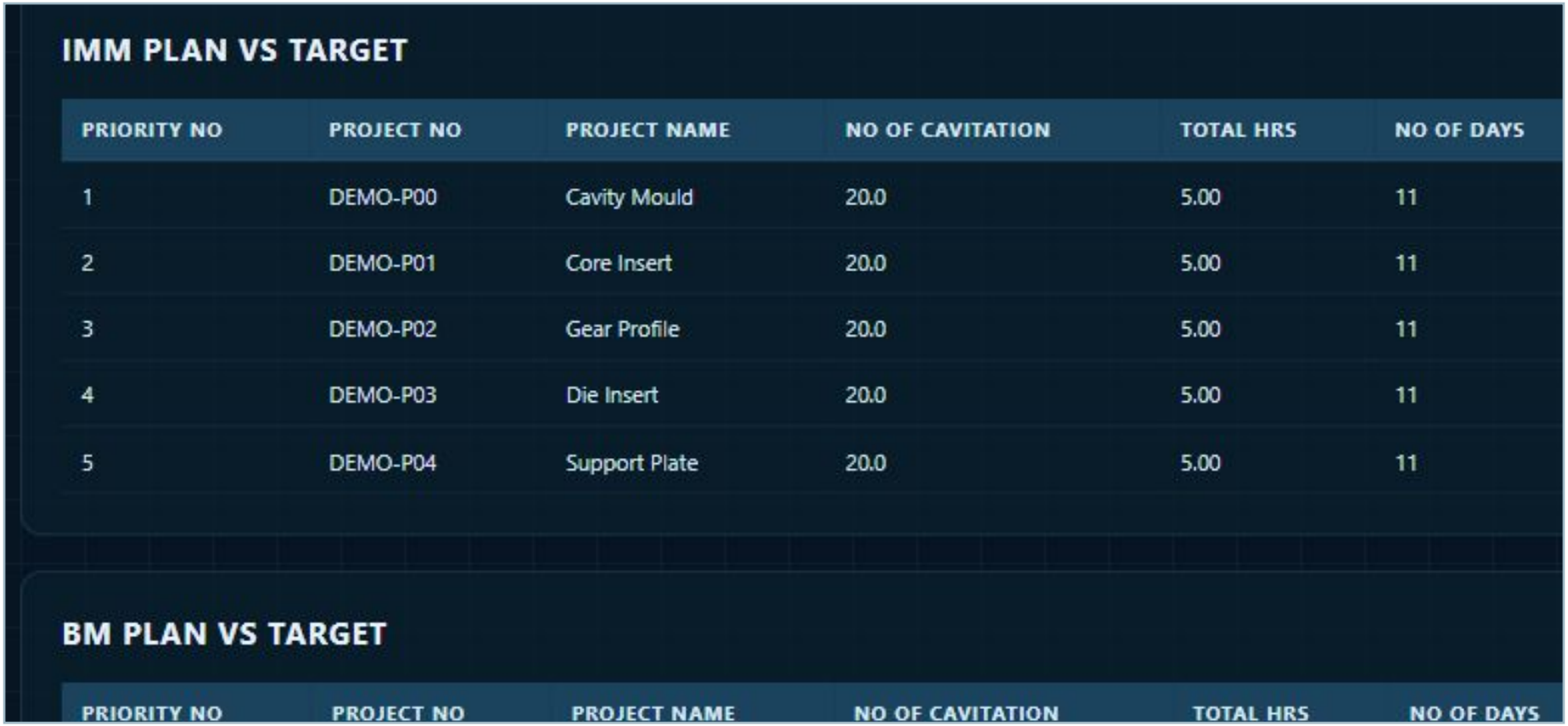
3. EXPORT BM PDF
Export the current report/stock scope in the indicated format

4. EXPORT PF PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Illustrated detail 03 • orange numbers point to the named controls



IMM PLAN VS TARGET

PRIORITY NO	PROJECT NO	PROJECT NAME	NO OF CAVITATION	TOTAL HRS	NO OF DAYS
1	DEMO-P00	Cavity Mould	20.0	5.00	11
2	DEMO-P01	Core Insert	20.0	5.00	11
3	DEMO-P02	Gear Profile	20.0	5.00	11
4	DEMO-P03	Die Insert	20.0	5.00	11
5	DEMO-P04	Support Plate	20.0	5.00	11

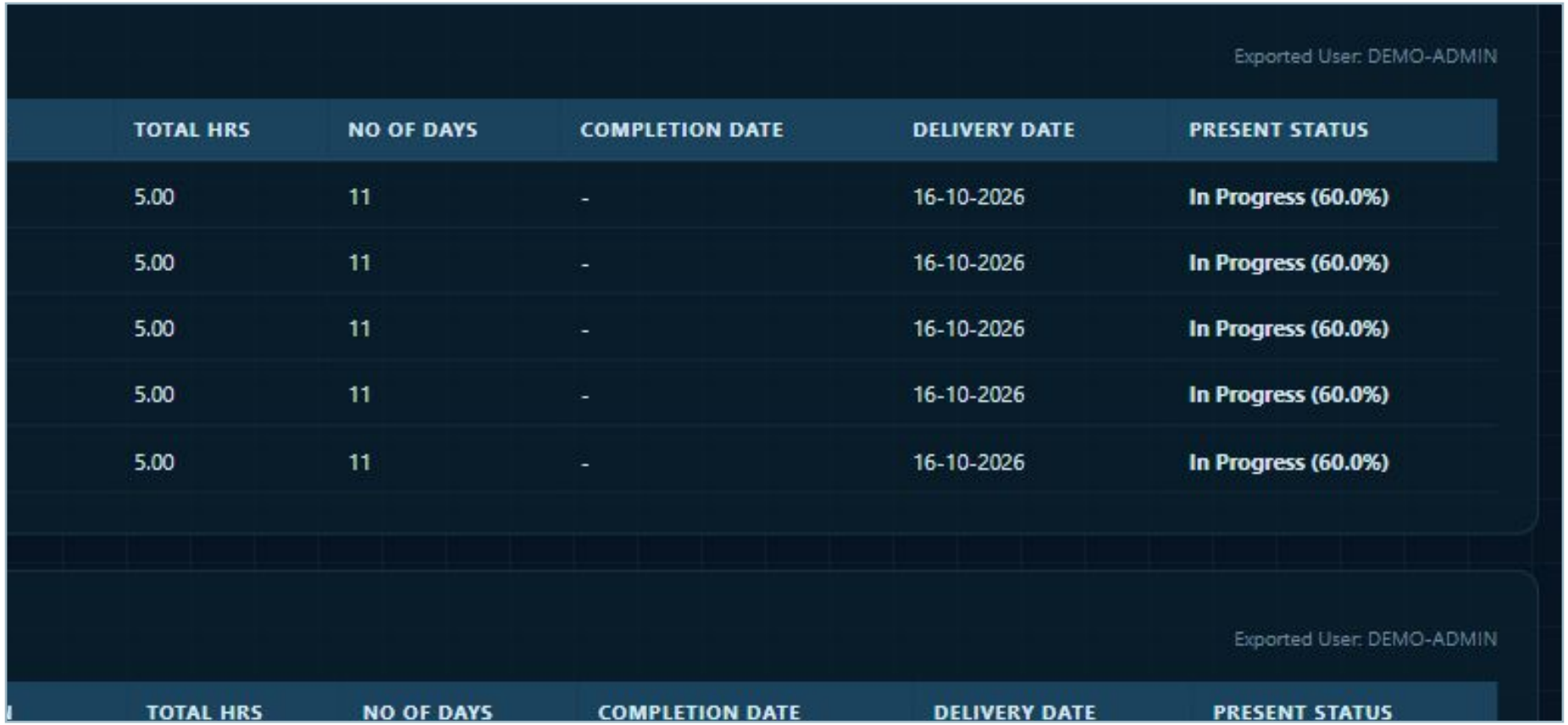
BM PLAN VS TARGET

PRIORITY NO	PROJECT NO	PROJECT NAME	NO OF CAVITATION	TOTAL HRS	NO OF DAYS

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

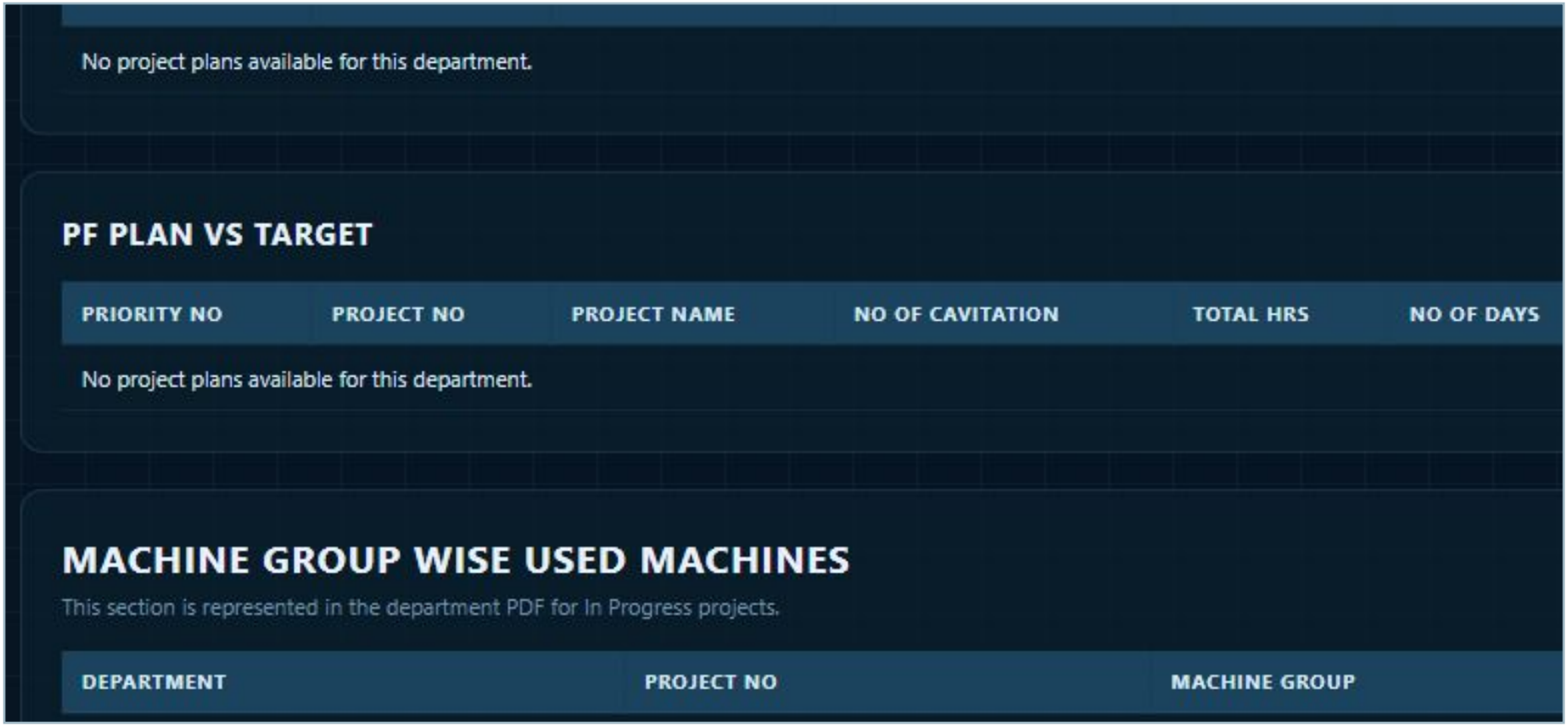
Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

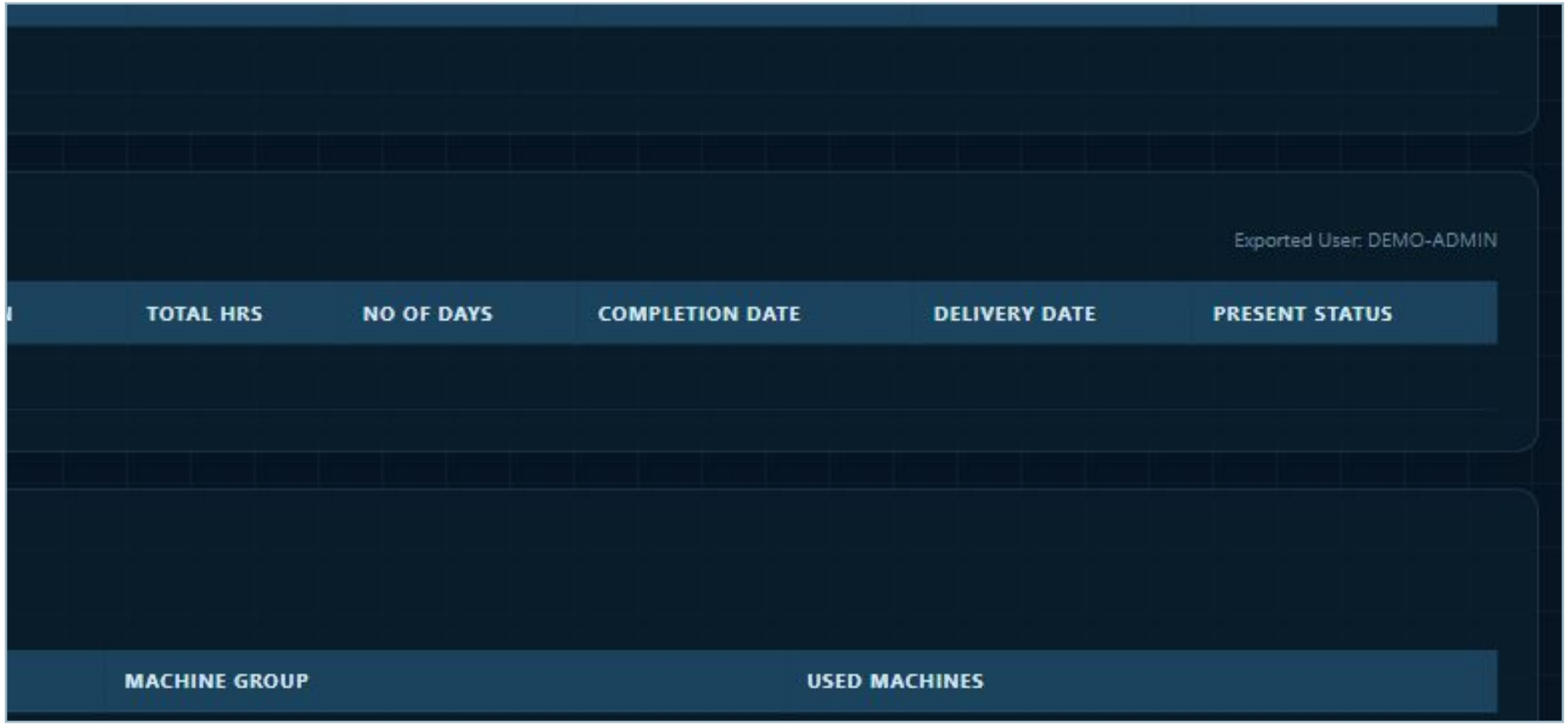
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

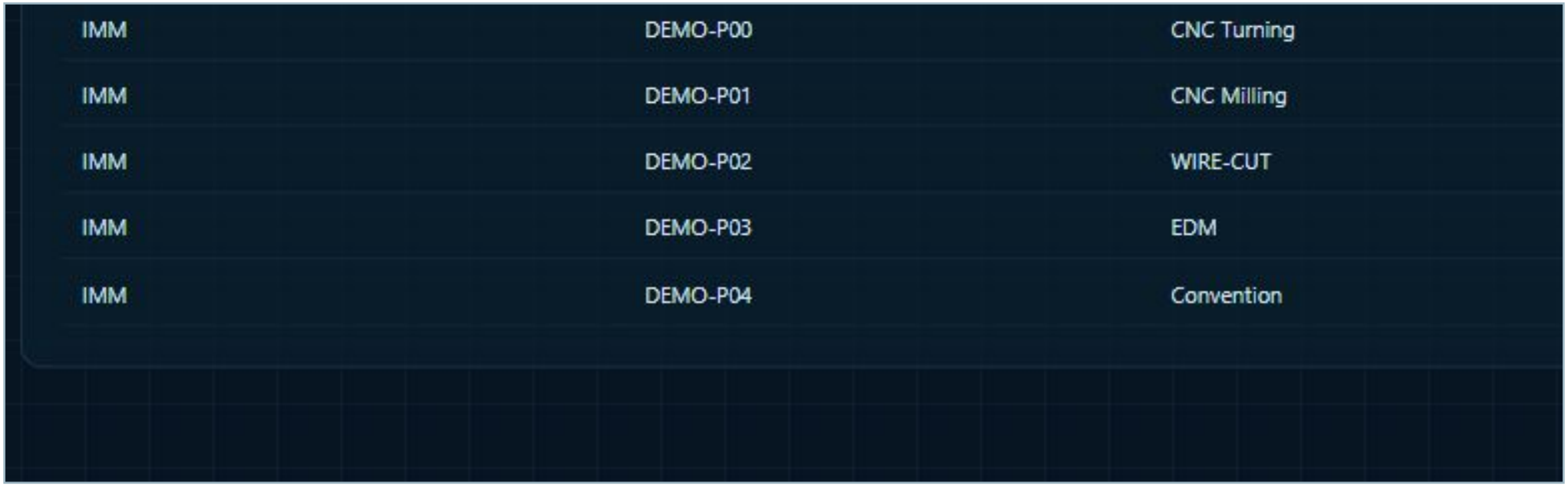
Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Illustrated detail 07 • orange numbers point to the named controls

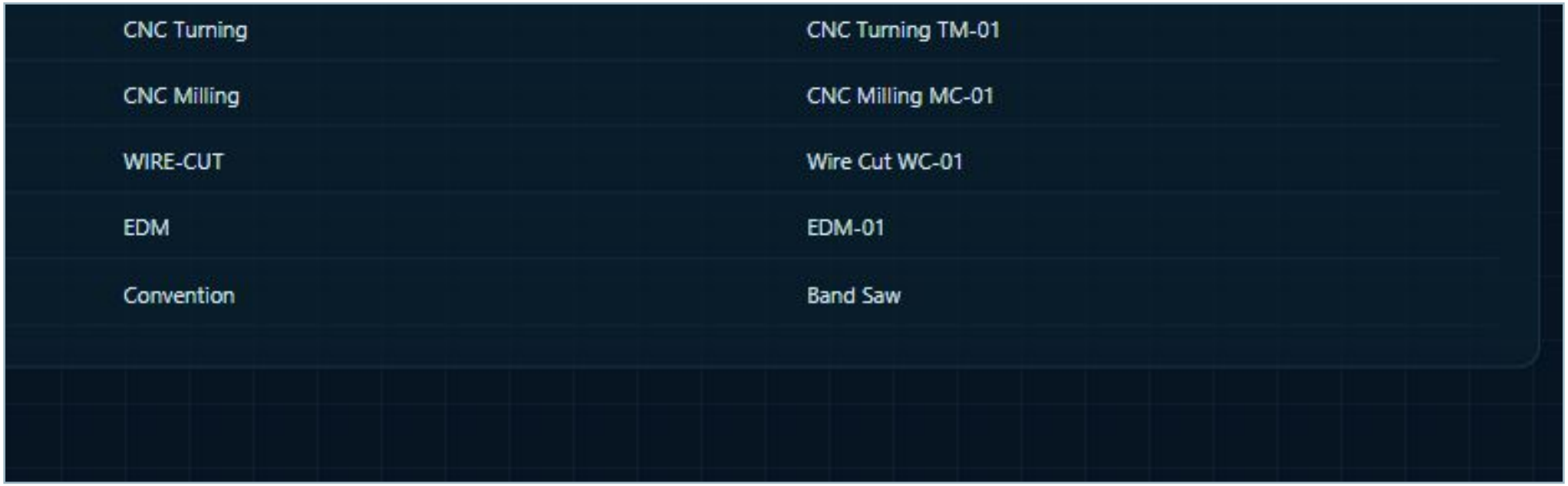


IMM	DEMO-P00	CNC Turning
IMM	DEMO-P01	CNC Milling
IMM	DEMO-P02	WIRE-CUT
IMM	DEMO-P03	EDM
IMM	DEMO-P04	Convention

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Illustrated detail 08 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

21 Plan Vs Target

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
PLAN VS TARGET	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
EXPORT IMM PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
EXPORT BM PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
EXPORT PF PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

22 Completed Projects

Workflow • read before using the illustrated controls

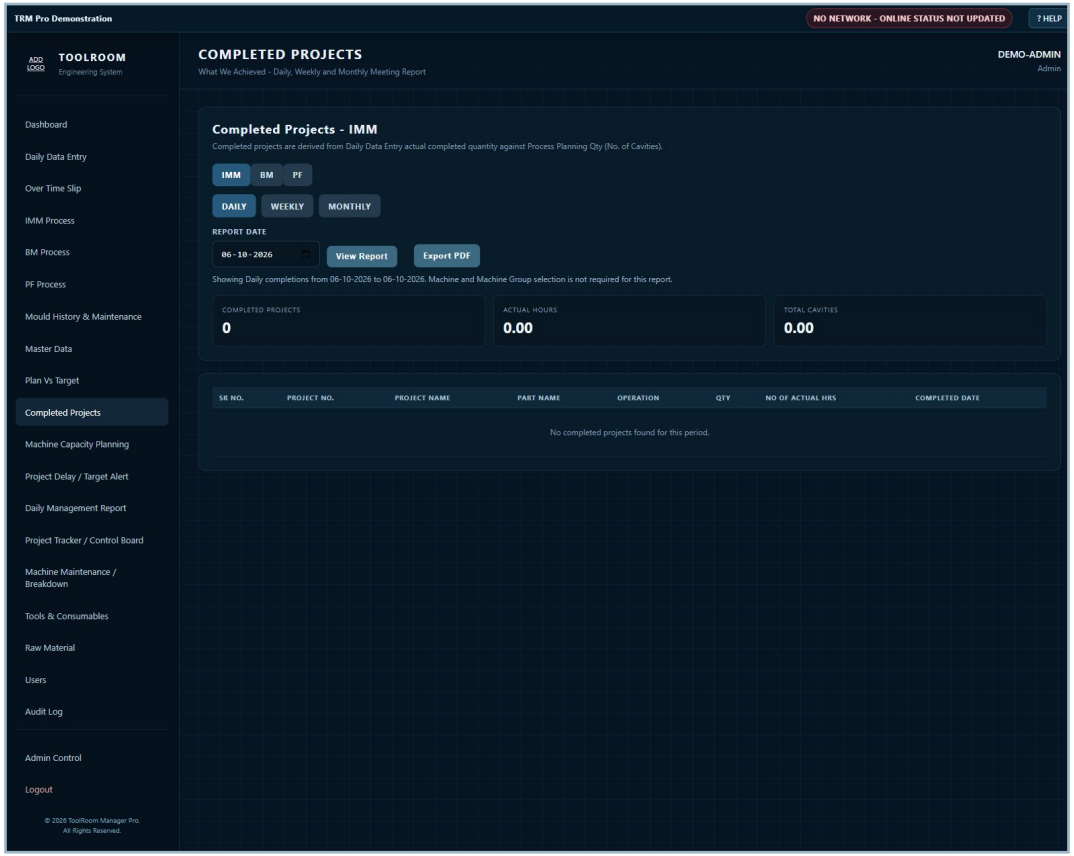
1. Select the available department/project/date filters and show the results.
2. Review the completed quantities and completion details.
3. Use the available export action for the filtered view.

Practical notes

A project may contain multiple parts and operations. Confirm the required operations are complete before treating the entire project as closed.

22 Completed Projects

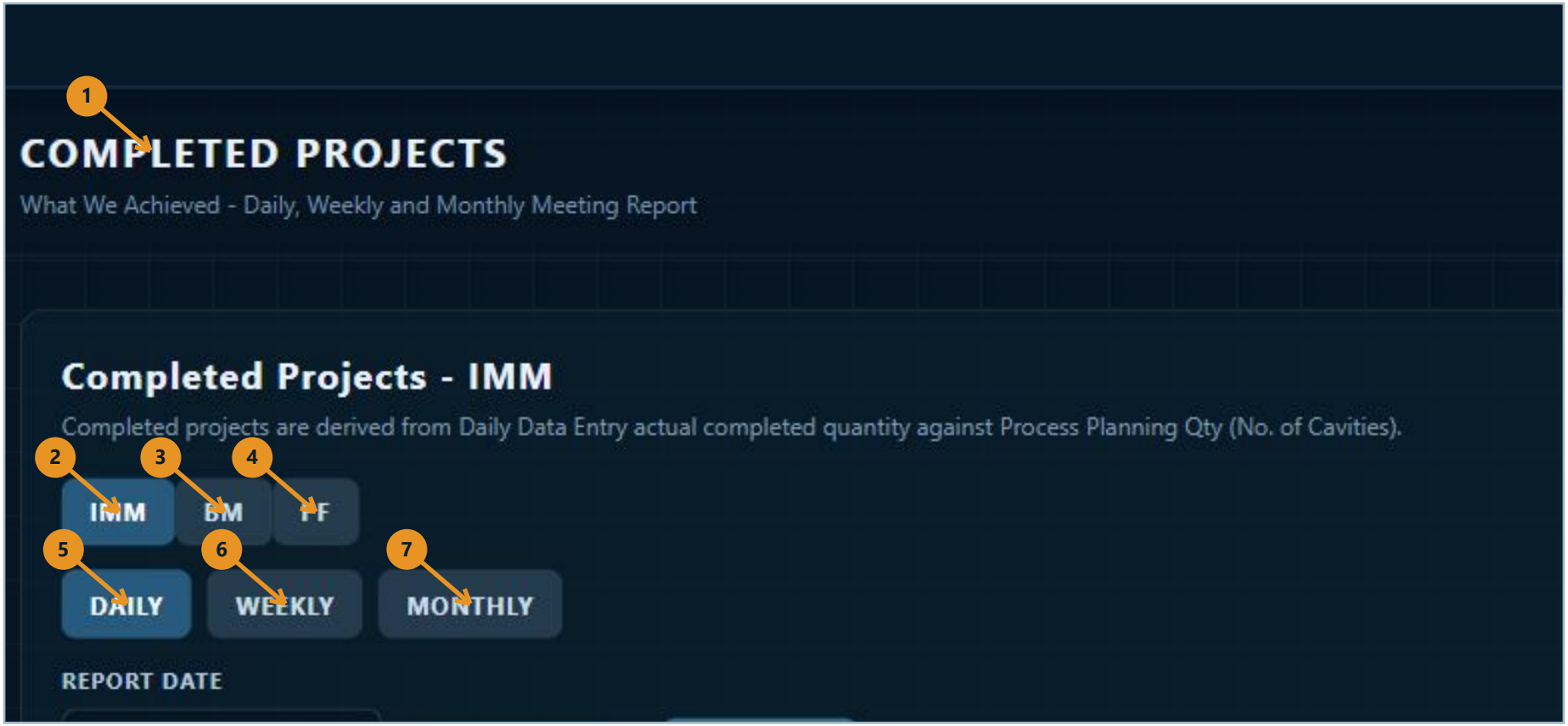
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

22 Completed Projects

Illustrated detail 01 • orange numbers point to the named controls



1. COMPLETED PROJECTS
Enter or review this value as labeled

2. IMM
Use this named action/tab for the workflow described in this chapter

3. BM
Use this named action/tab for the workflow described in this chapter

4. PF
Use this named action/tab for the workflow described in this chapter

5. DAILY
Use this named action/tab for the workflow described in this chapter

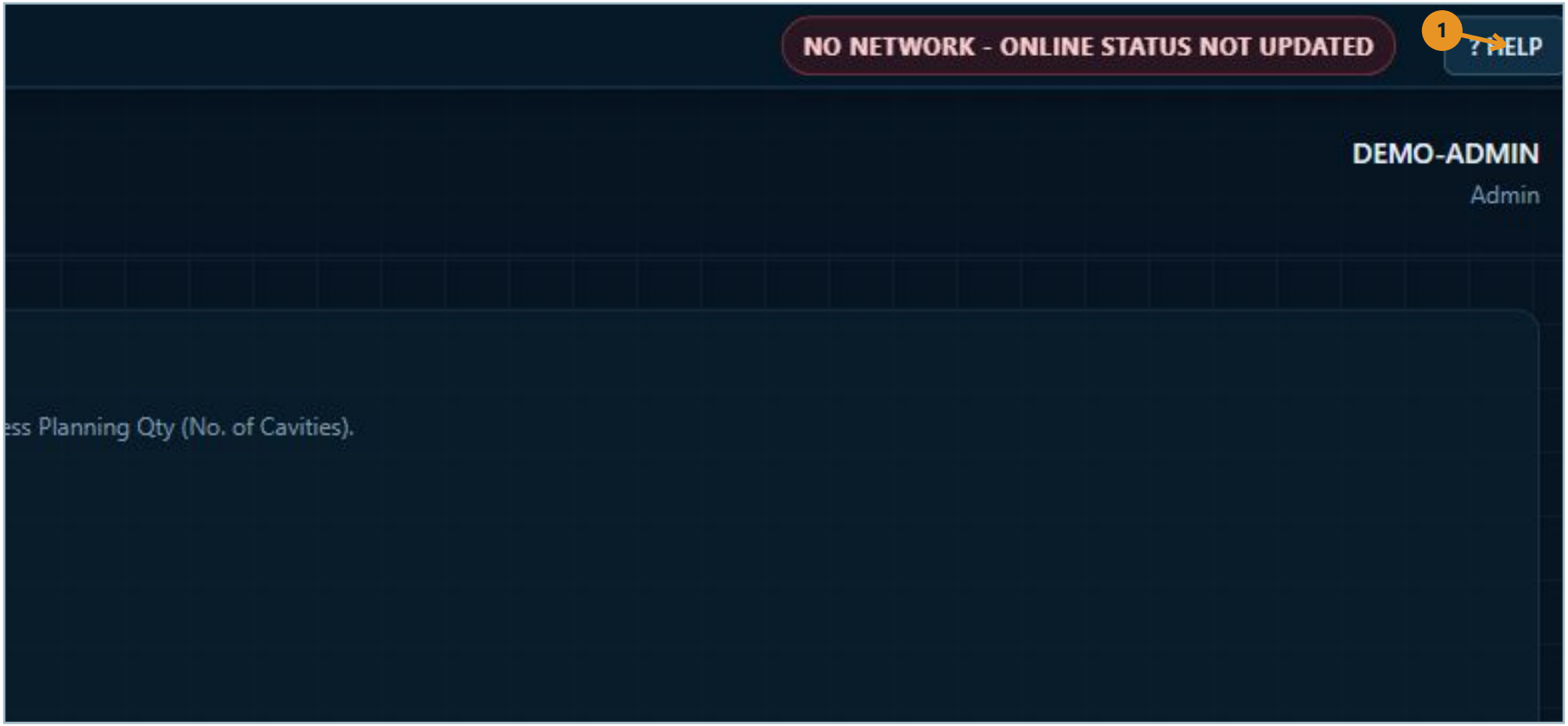
6. WEEKLY
Use this named action/tab for the workflow described in this chapter

7. MONTHLY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

22 Completed Projects

Illustrated detail 02 • orange numbers point to the named controls

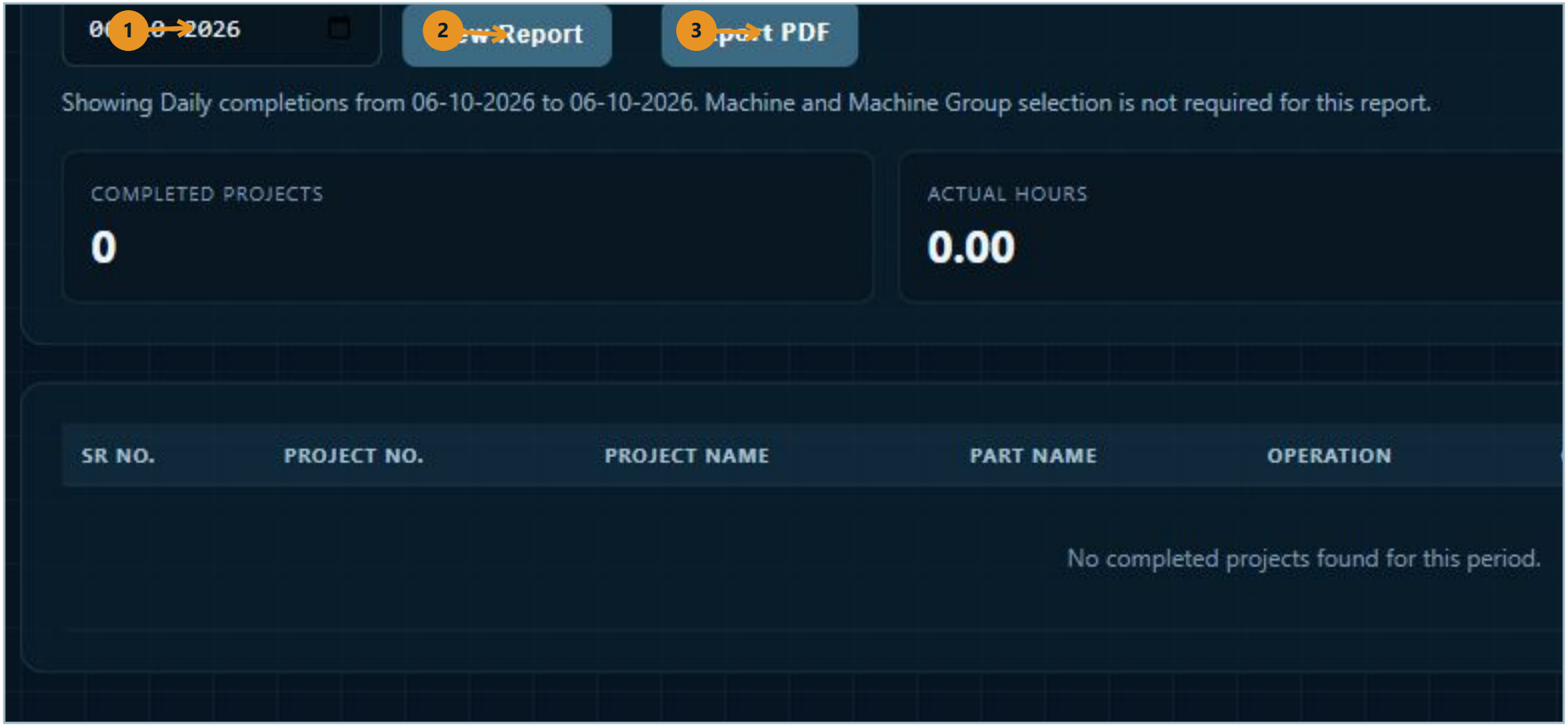


1. Help - User Manual
Open the bundled PDF manual in TRM Pro

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

22 Completed Projects

Illustrated detail 03 • orange numbers point to the named controls



1. REPORT DATE
Select the actual reference date/time for this record or report

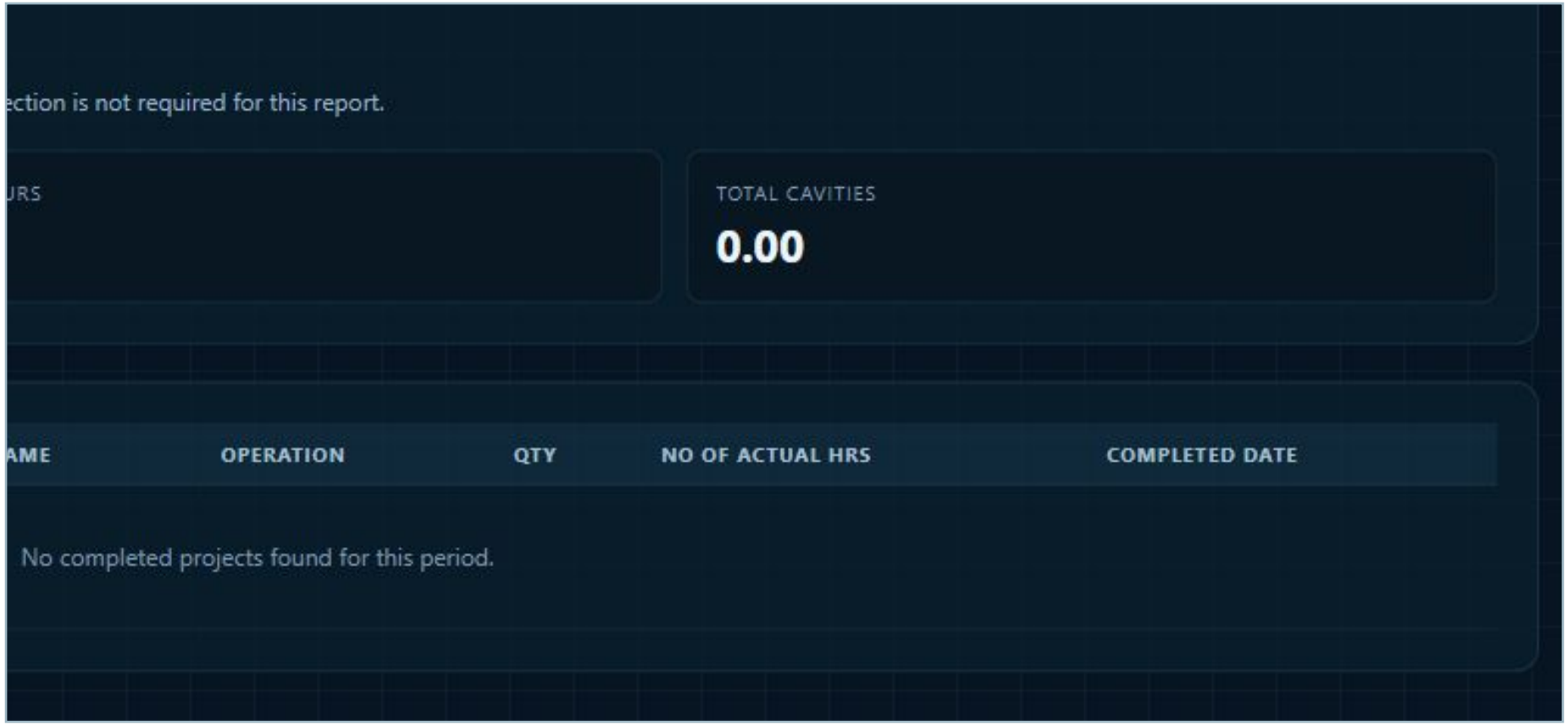
2. View Report
Use this named action/tab for the workflow described in this chapter

3. Export PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

22 Completed Projects

Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

22 Completed Projects

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
COMPLETED PROJECTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
IMM	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
BM	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
PF	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
DAILY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
WEEKLY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
MONTHLY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
REPORT DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
View Report	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Export PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.

23 Project Delay / Target Alert

Workflow • read before using the illustrated controls

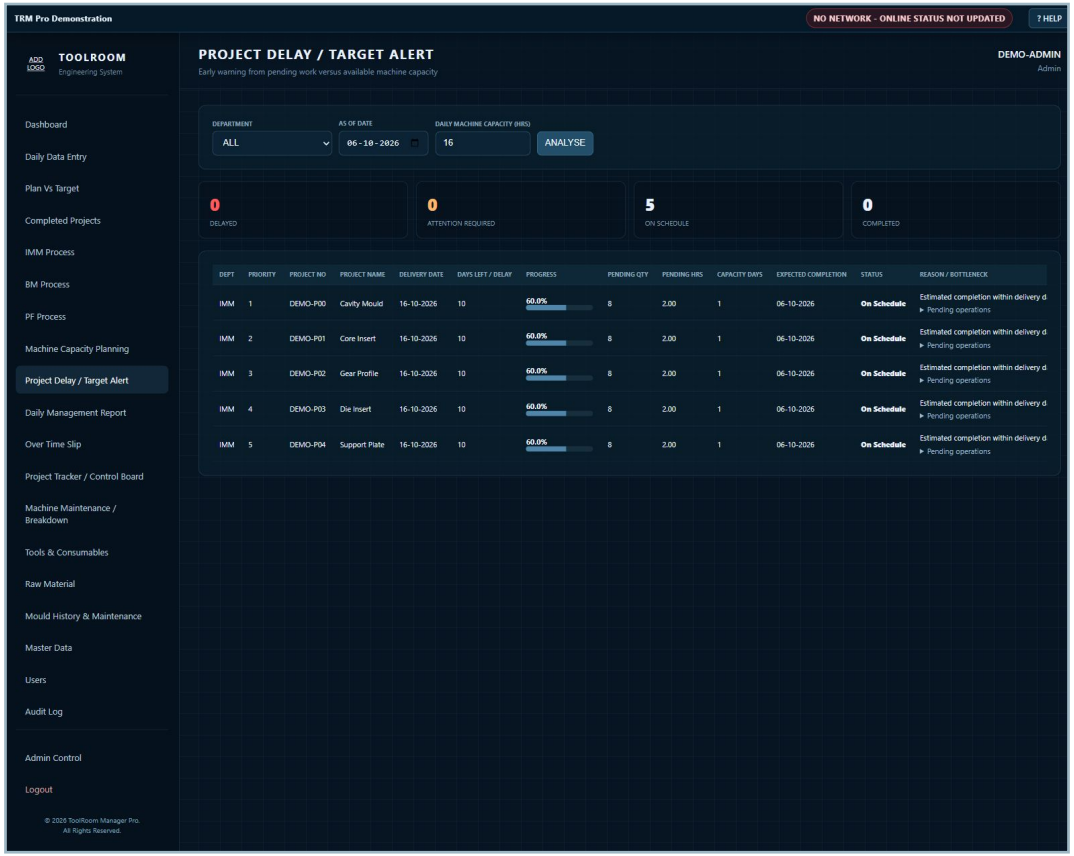
1. Choose the available project/department scope and refresh.
2. Read delivery date, pending quantity/hours, expected completion, status and reason together.
3. Review machine capacity or the active plan when an expected finish exceeds the delivery target.

Practical notes

A permission-denied screen for Delay Alert / View means Admin must authorize the module View action. Do not change project data merely to hide the alert.

23 Project Delay / Target Alert

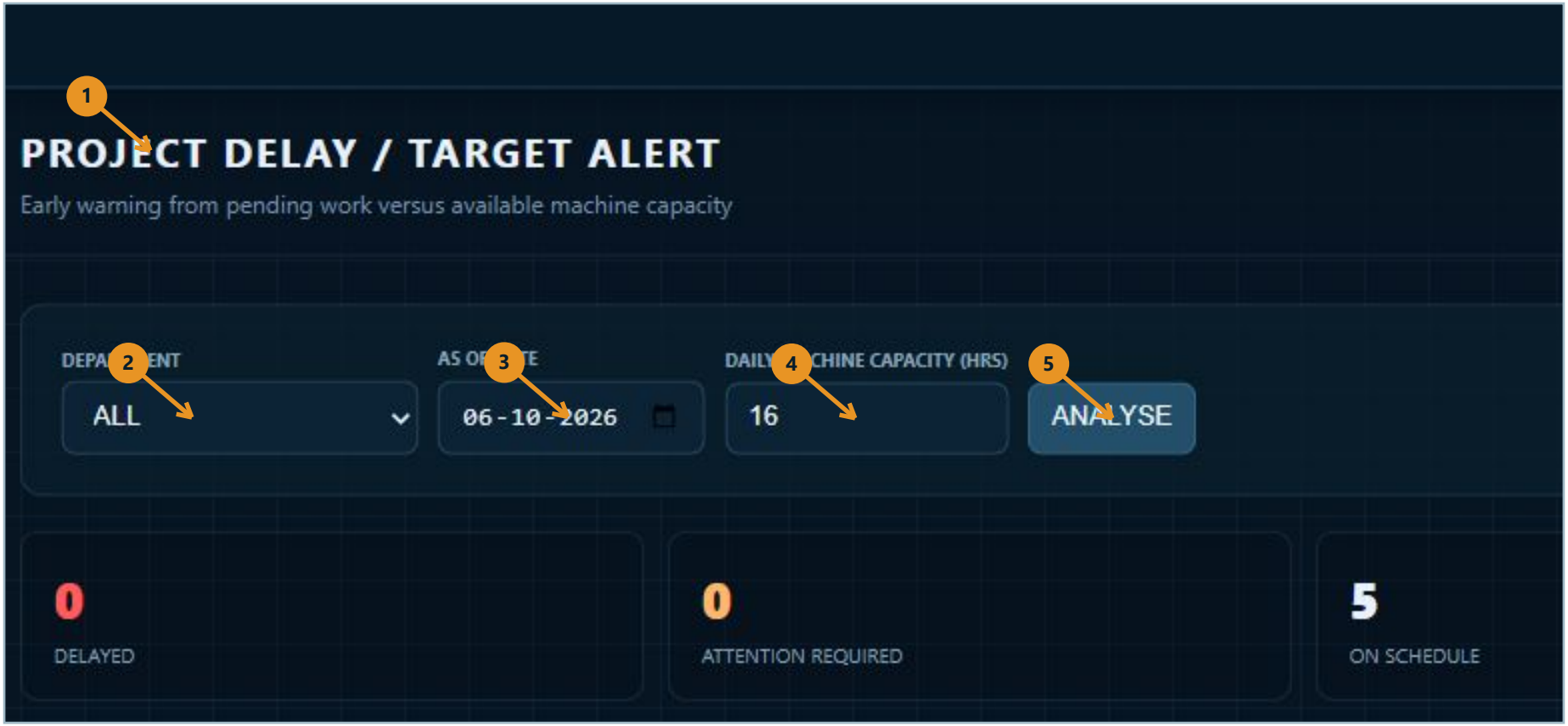
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

23 Project Delay / Target Alert

Illustrated detail 01 • orange numbers point to the named controls



1. PROJECT DELAY / TARGET ALERT
Enter or review this value as labeled

2. Department
Choose the required value

3. AS OF DATE
Select the actual reference date/time for this record or report

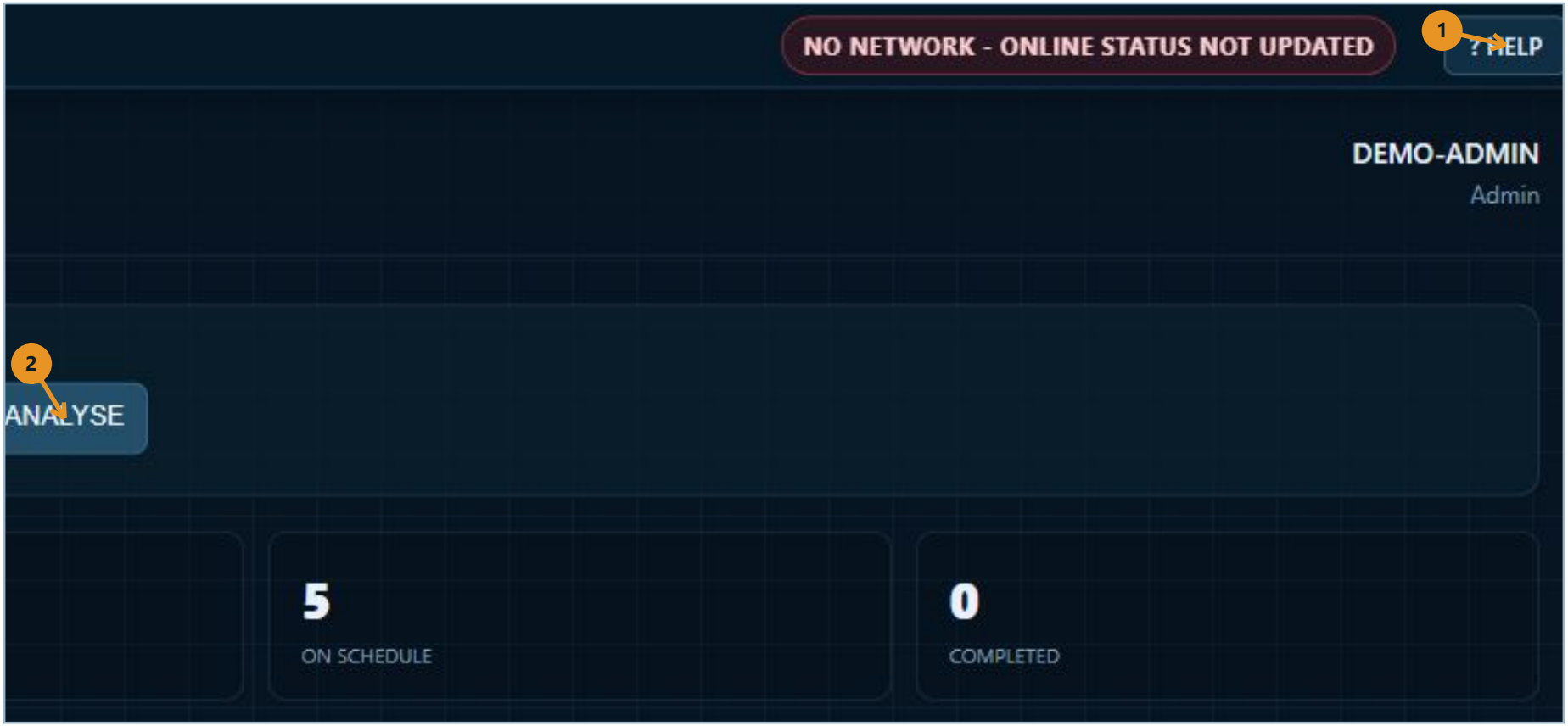
4. DAILY MACHINE CAPACITY (HRS)
Enter the numeric quantity/time required by the label

5. ANALYSE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

23 Project Delay / Target Alert

Illustrated detail 02 • orange numbers point to the named controls



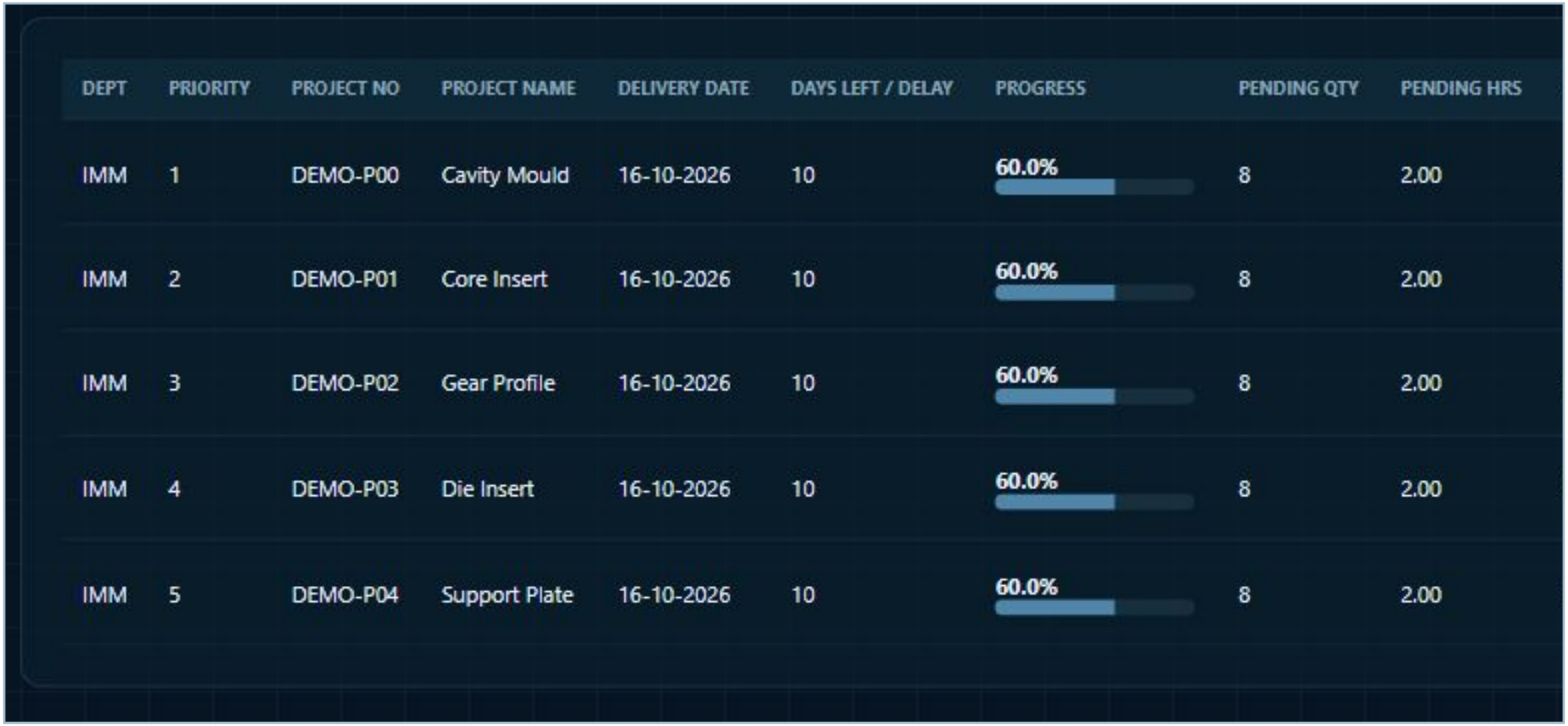
1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. ANALYSE
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

23 Project Delay / Target Alert

Illustrated detail 03 • orange numbers point to the named controls

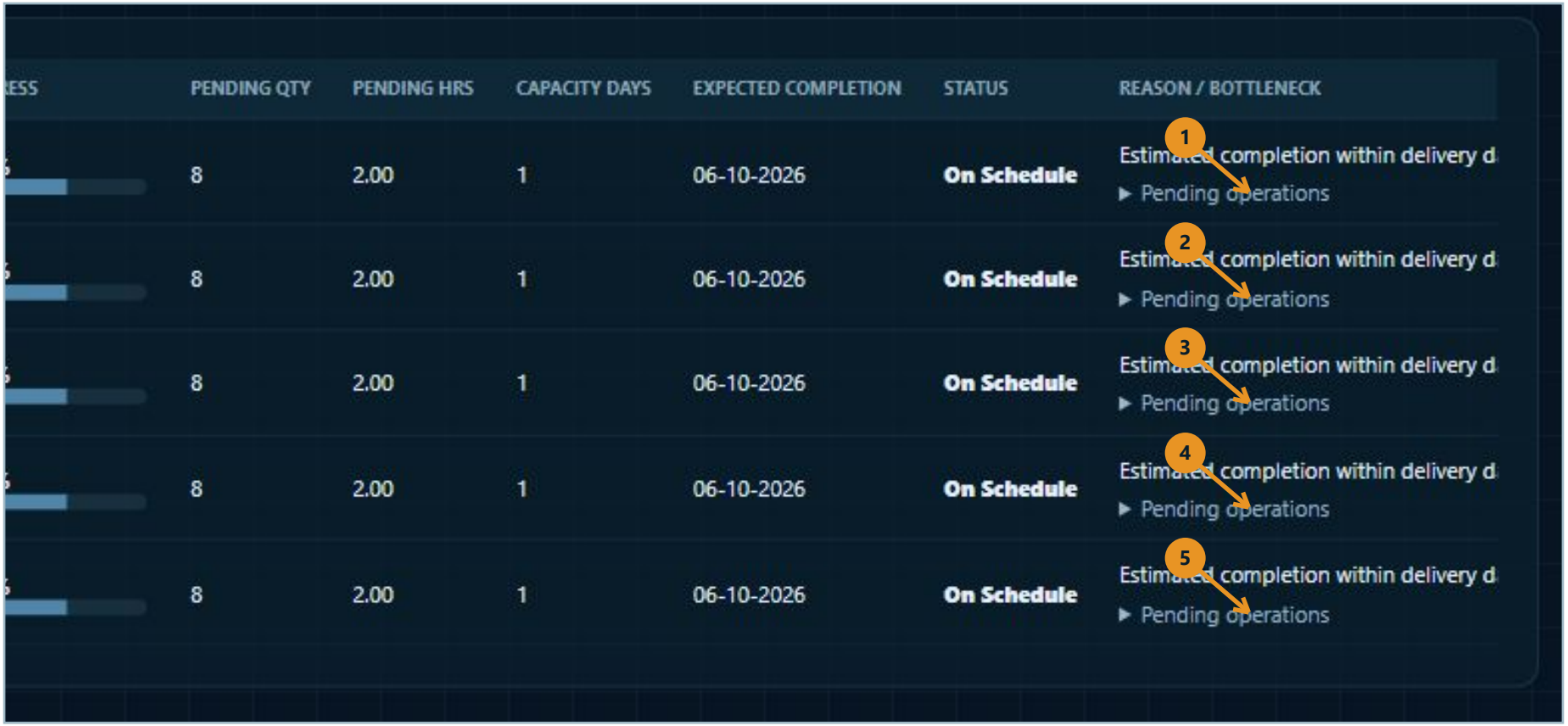


DEPT	PRIORITY	PROJECT NO	PROJECT NAME	DELIVERY DATE	DAYS LEFT / DELAY	PROGRESS	PENDING QTY	PENDING HRS
IMM	1	DEMO-P00	Cavity Mould	16-10-2026	10	60.0%	8	2.00
IMM	2	DEMO-P01	Core Insert	16-10-2026	10	60.0%	8	2.00
IMM	3	DEMO-P02	Gear Profile	16-10-2026	10	60.0%	8	2.00
IMM	4	DEMO-P03	Die Insert	16-10-2026	10	60.0%	8	2.00
IMM	5	DEMO-P04	Support Plate	16-10-2026	10	60.0%	8	2.00

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

23 Project Delay / Target Alert

Illustrated detail 04 • orange numbers point to the named controls



1. Pending operations
Use this named action/tab for the workflow described in this chapter

2. Pending operations
Use this named action/tab for the workflow described in this chapter

3. Pending operations
Use this named action/tab for the workflow described in this chapter

4. Pending operations
Use this named action/tab for the workflow described in this chapter

5. Pending operations
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

23 Project Delay / Target Alert

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
PROJECT DELAY / TARGET ALERT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
AS OF DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
DAILY MACHINE CAPACITY (HRS)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
ANALYSE	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Pending operations	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

24 Daily Management Report

Workflow • read before using the illustrated controls

1. Choose daily/weekly/monthly period, reference date and department; then SHOW REPORT.
2. Read Production Entries, Completed Qty, Actual Hours, Utilisation and maintenance/alert cards for the selected period.
3. Expand Loss Summary and Operator Performance using the top-right arrow. Both start minimized where configured.
4. Review Department Summary, Machine Performance and Operator Performance alongside setting, inspection, power-cut and idle losses.
5. Use EXPORT PDF for the selected report scope.

Worked example

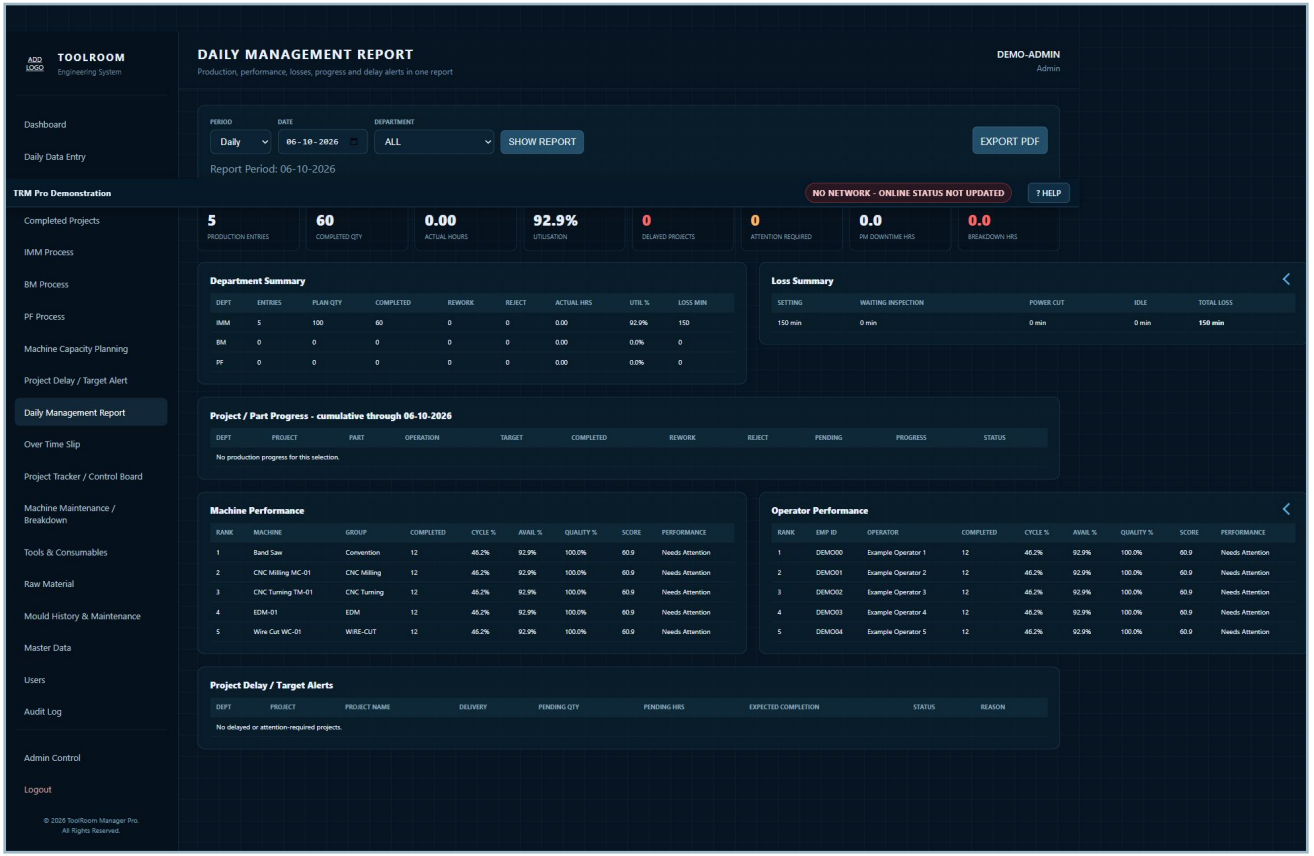
If a daily report shows no operator data, choose a date containing Daily Data Entry records. A monthly report can show production while a different single day is empty.

Practical notes

Project / Part Progress is cumulative through the displayed cutoff. It can remain populated when a selected day has no production entries. Collapsing a section hides its whole body; rows themselves are not independent fold controls.

24 Daily Management Report

Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 01 • orange numbers point to the named controls



1. DAILY MANAGEMENT REPORT
Enter or review this value as labeled

2. Period
Choose the required value

3. DATE
Select the actual reference date/time for this record or report

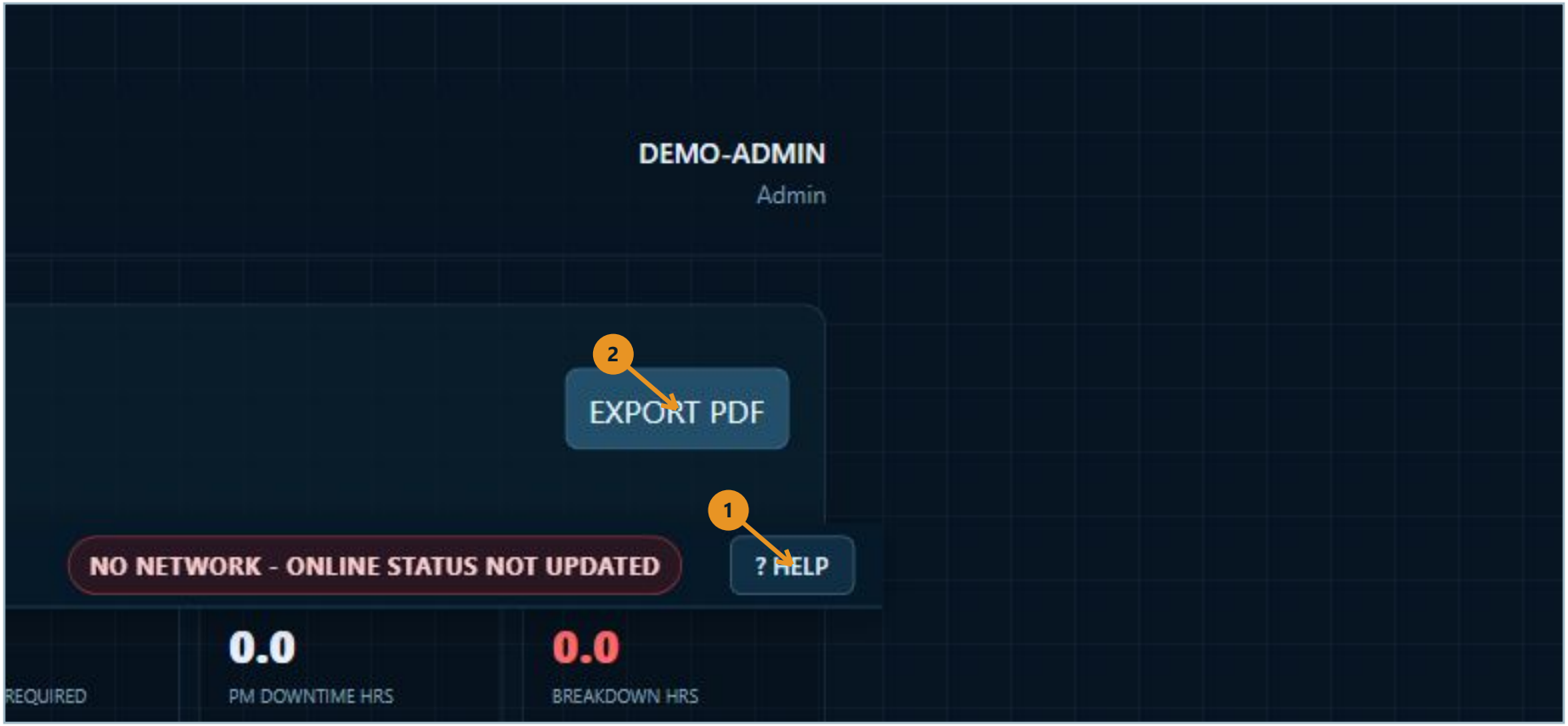
4. Department
Choose the required value

5. SHOW REPORT
Apply the selected filters and refresh the displayed results

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. EXPORT PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 03 • orange numbers point to the named controls



Department Summary

DEPT	ENTRIES	PLAN QTY	COMPLETED	REWORK	REJECT	ACTUAL HRS	UTIL %	LOSS MIN
IMM	5	100	60	0	0	0.00	92.9%	150
BM	0	0	0	0	0	0.00	0.0%	0
PF	0	0	0	0	0	0.00	0.0%	0

Project / Part Progress - cumulative through 06-10-2026

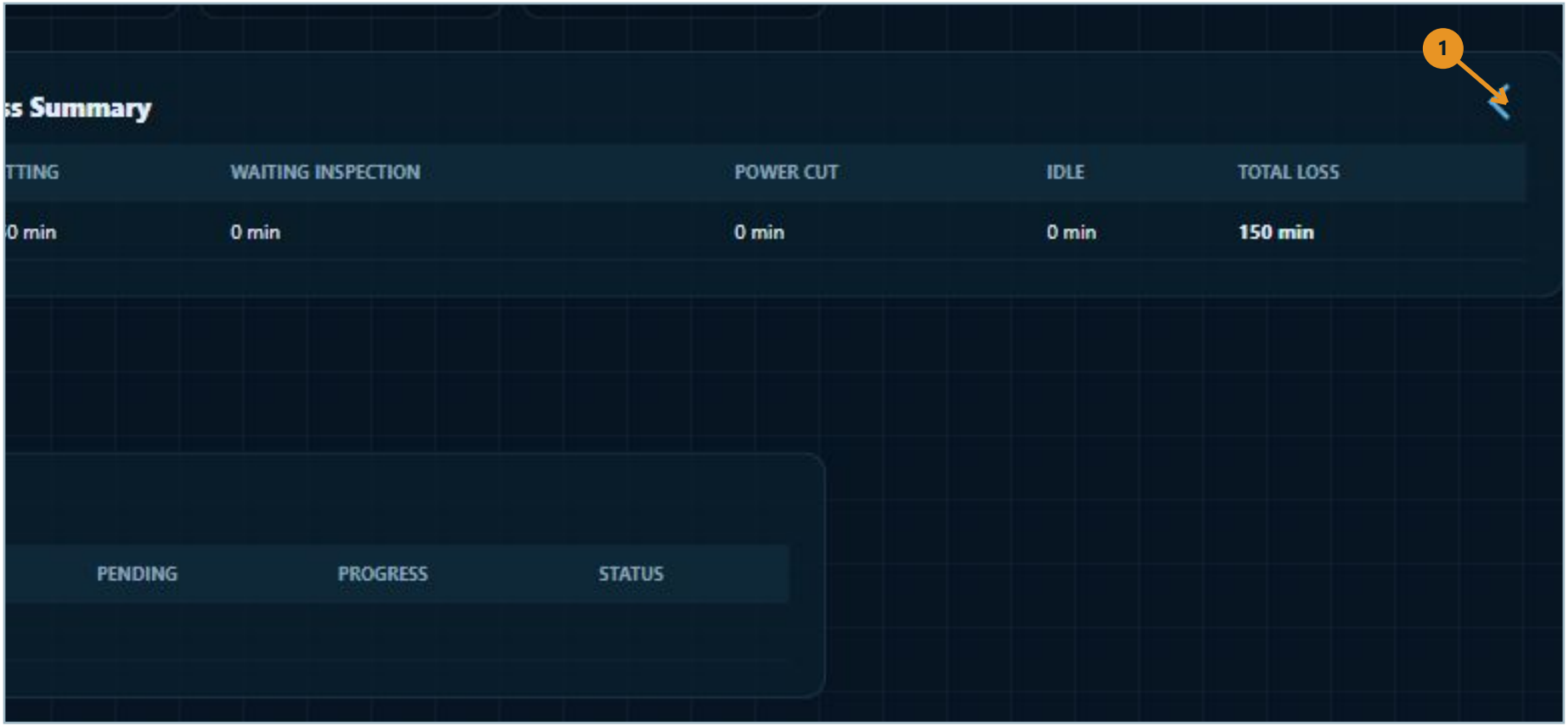
DEPT	PROJECT	PART	OPERATION	TARGET	COMPLETED	REWORK

No production progress for this selection.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 04 • orange numbers point to the named controls



1. Fold section
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 05 • orange numbers point to the named controls



Machine Performance

RANK	MACHINE	GROUP	COMPLETED	CYCLE %	AVAIL %	QUALITY %	SCORE	PERFORMANCE
1	Band Saw	Convention	12	46.2%	92.9%	100.0%	60.9	Needs Attention
2	CNC Milling MC-01	CNC Milling	12	46.2%	92.9%	100.0%	60.9	Needs Attention
3	CNC Turning TM-01	CNC Turning	12	46.2%	92.9%	100.0%	60.9	Needs Attention
4	EDM-01	EDM	12	46.2%	92.9%	100.0%	60.9	Needs Attention
5	Wire Cut WC-01	WIRE-CUT	12	46.2%	92.9%	100.0%	60.9	Needs Attention

Project Delay / Target Alerts

DEPT	PROJECT	PROJECT NAME	DELIVERY	PENDING QTY	PENDING HRS

No delayed or attention-required projects.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Illustrated detail 06 • orange numbers point to the named controls



1. Fold section
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

24 Daily Management Report

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
DAILY MANAGEMENT REPORT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Period	Choose the required value. Available choices: Daily; Weekly; Monthly. The displayed records follow this screen’s scope and account access.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen’s scope and account access.
SHOW REPORT	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
EXPORT PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
Fold section	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

25 Project Tracker / Control Board

Workflow • read before using the illustrated controls

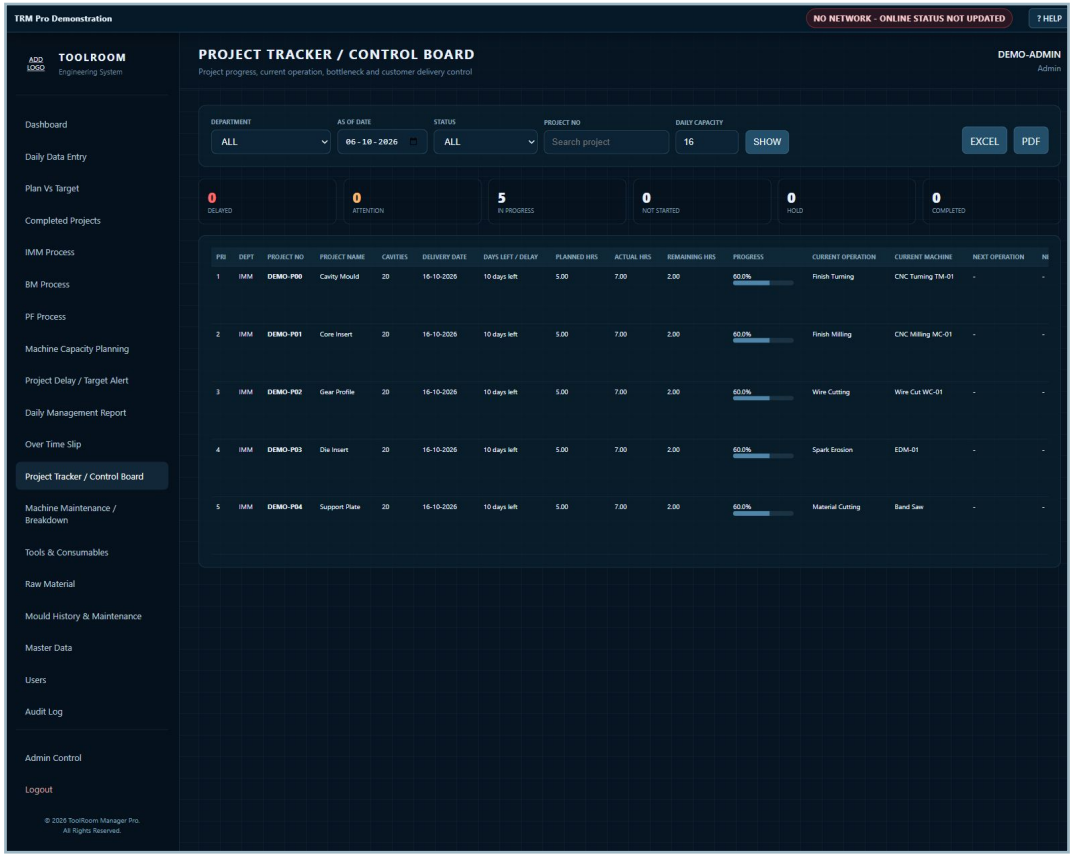
1. Use the available department/project/status filters to focus the control board.
2. Review part/operation progress, pending quantities and status.
3. Follow up delayed or blocked work using the process plan and daily entry records.

Practical notes

Use the tracker as a review screen; source production and planning records determine its results.

25 Project Tracker / Control Board

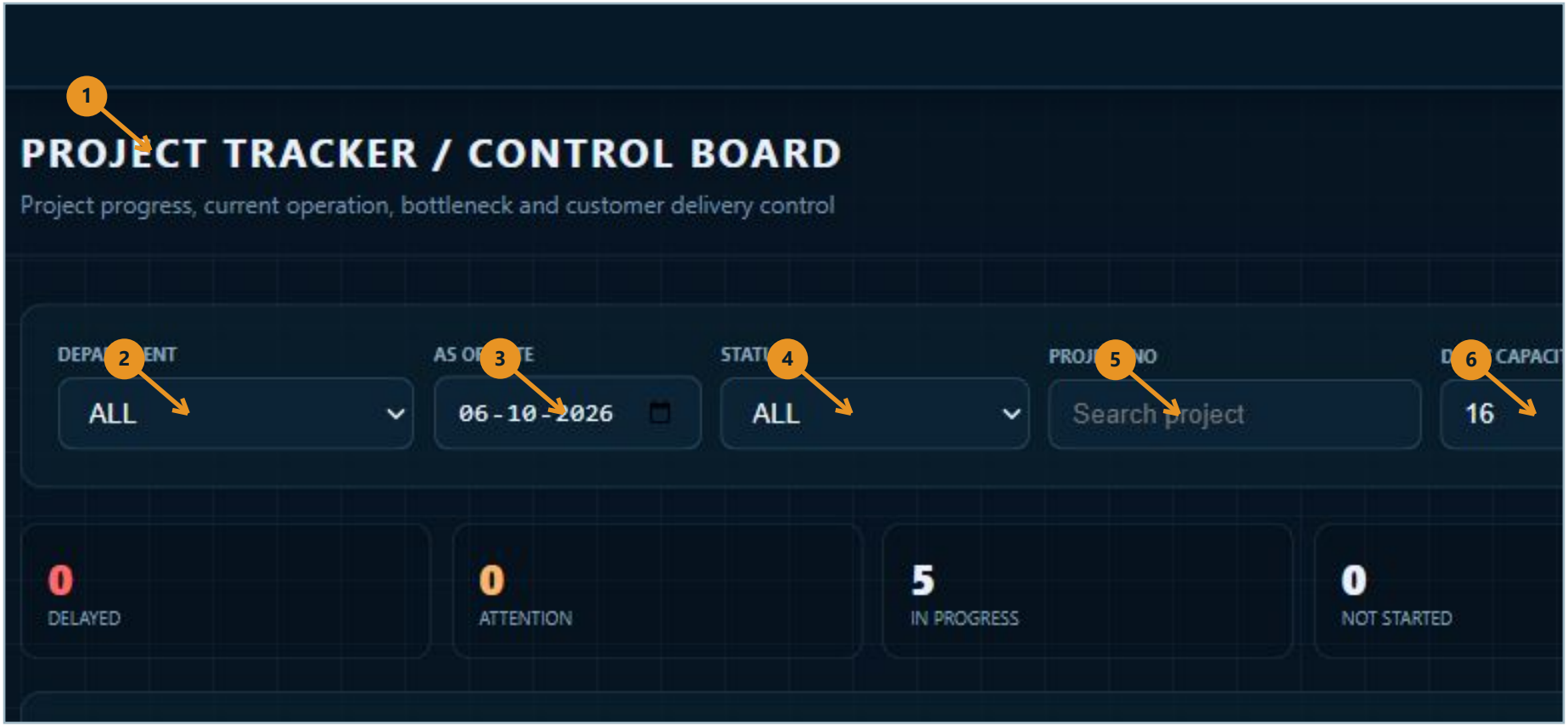
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Illustrated detail 01 • orange numbers point to the named controls



1. PROJECT TRACKER / CONTROL BOARD
Enter or review this value as labeled

2. Department
Choose the required value

3. AS OF DATE
Select the actual reference date/time for this record or report

4. Status
Choose the required value

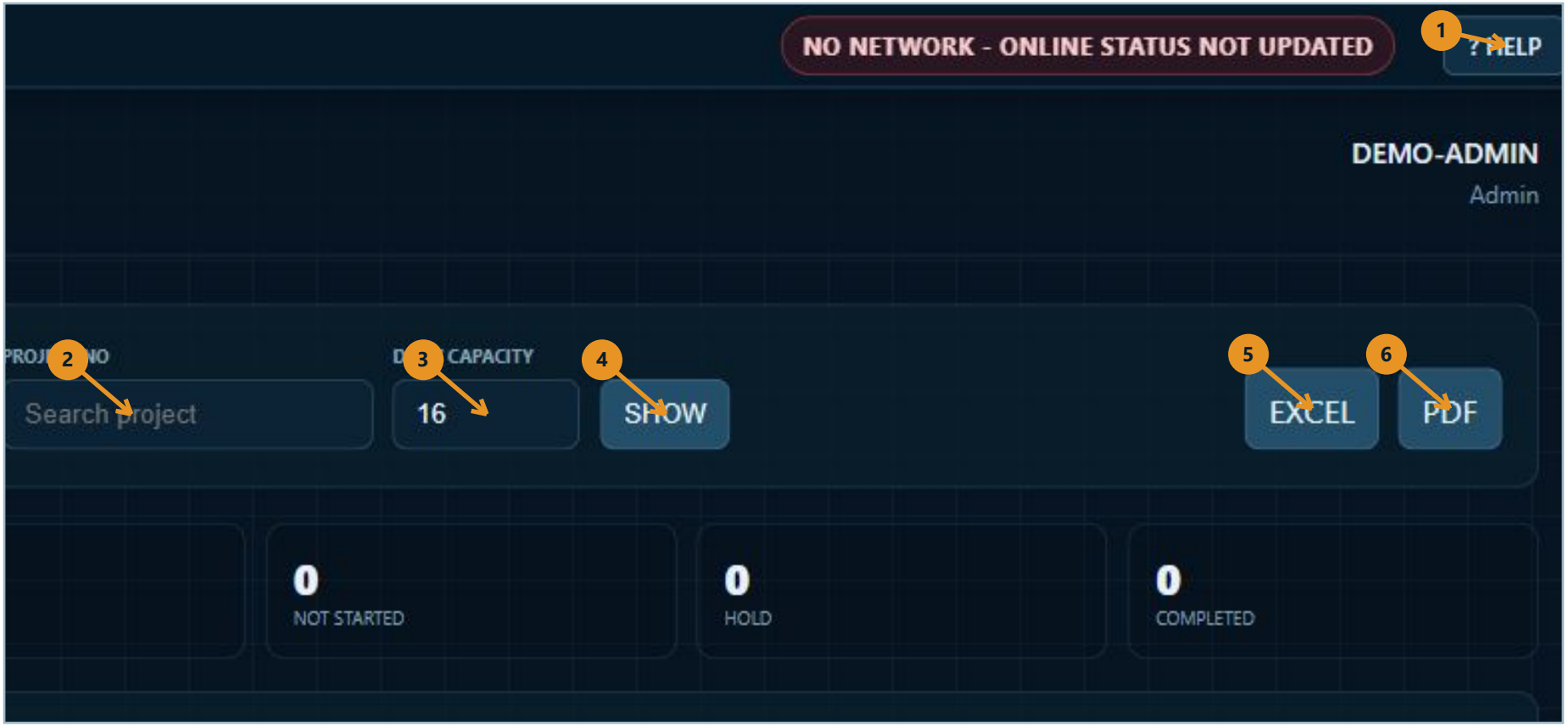
5. PROJECT NO
Enter or review this value as labeled

6. DAILY CAPACITY
Enter the numeric quantity/time required by the label

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. PROJECT NO
Enter or review this value as labeled

3. DAILY CAPACITY
Enter the numeric quantity/time required by the label

4. SHOW
Apply the selected filters and refresh the displayed results

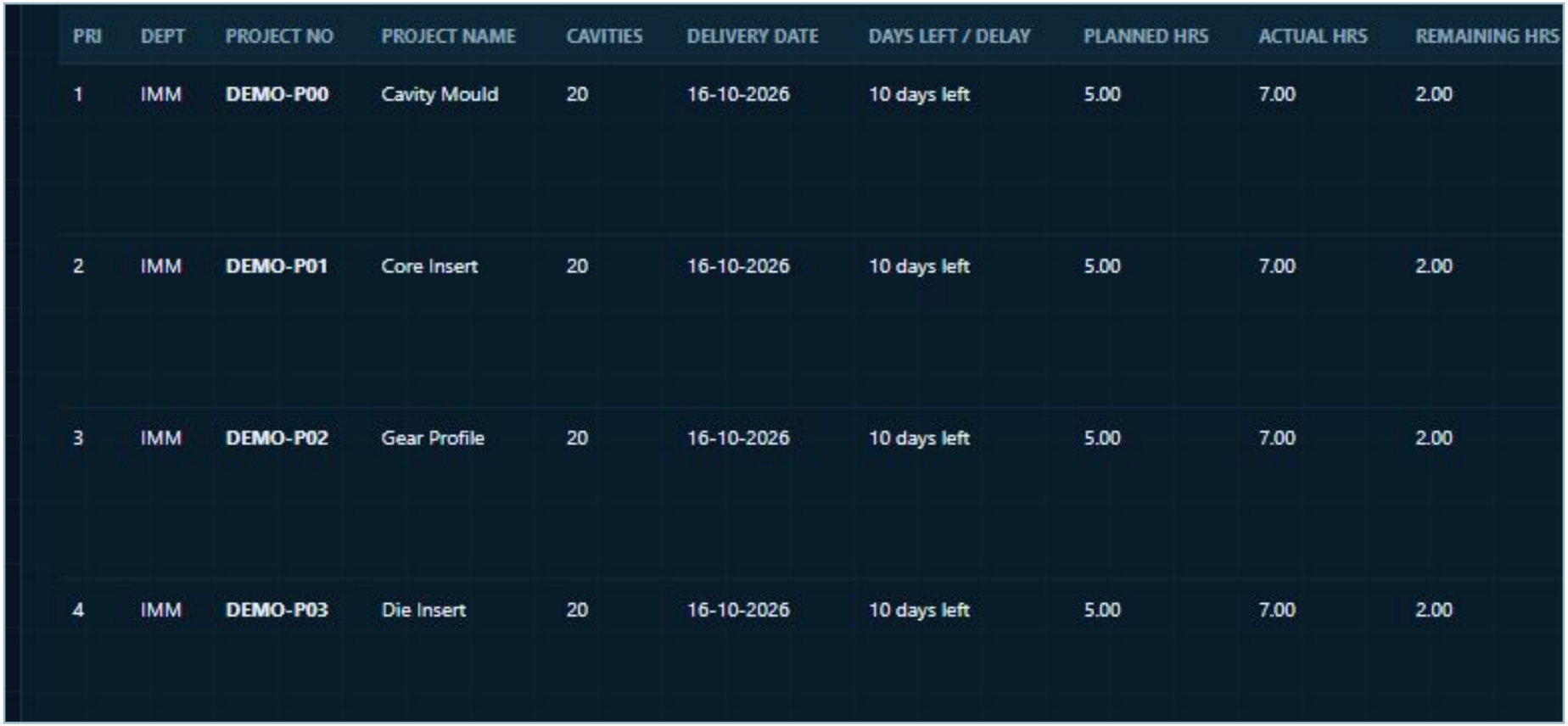
5. EXCEL
Export the current report/stock scope in the indicated format

6. PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Illustrated detail 03 • orange numbers point to the named controls



PRI	DEPT	PROJECT NO	PROJECT NAME	CAVITIES	DELIVERY DATE	DAYS LEFT / DELAY	PLANNED HRS	ACTUAL HRS	REMAINING HRS
1	IMM	**DEMO-P00**	Cavity Mould	20	16-10-2026	10 days left	5.00	7.00	2.00
2	IMM	**DEMO-P01**	Core Insert	20	16-10-2026	10 days left	5.00	7.00	2.00
3	IMM	**DEMO-P02**	Gear Profile	20	16-10-2026	10 days left	5.00	7.00	2.00
4	IMM	**DEMO-P03**	Die Insert	20	16-10-2026	10 days left	5.00	7.00	2.00

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Illustrated detail 04 • orange numbers point to the named controls



PLANNED HRS	ACTUAL HRS	REMAINING HRS	PROGRESS	CURRENT OPERATION	CURRENT MACHINE	NEXT OPERATION	NE
5.00	7.00	2.00	60.0%	Finish Turning	CNC Turning TM-01	-	-
5.00	7.00	2.00	60.0%	Finish Milling	CNC Milling MC-01	-	-
5.00	7.00	2.00	60.0%	Wire Cutting	Wire Cut WC-01	-	-
5.00	7.00	2.00	60.0%	Spark Erosion	EDM-01	-	-

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

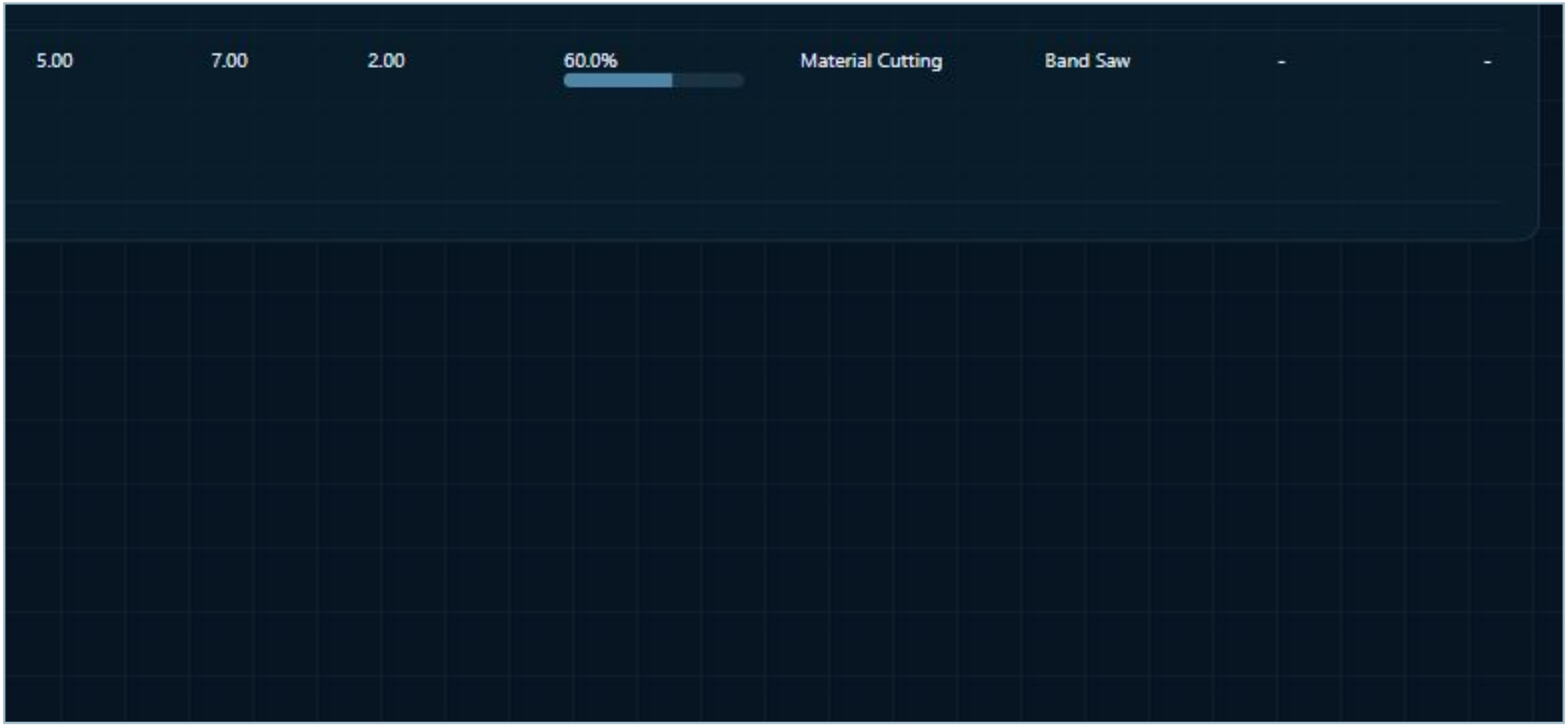
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

25 Project Tracker / Control Board

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
PROJECT TRACKER / CONTROL BOARD	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
AS OF DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Status	Choose the required value. Available choices: ALL; Delayed; Attention Required; In Progress; Not Started; Hold; Completed; Cancelled. The displayed records follow this screen's scope and account access.
PROJECT NO	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DAILY CAPACITY	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
SHOW	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
EXCEL	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
1 pending View operations	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Open saved plans →	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

26 Machine Maintenance / Breakdown

Workflow • read before using the illustrated controls

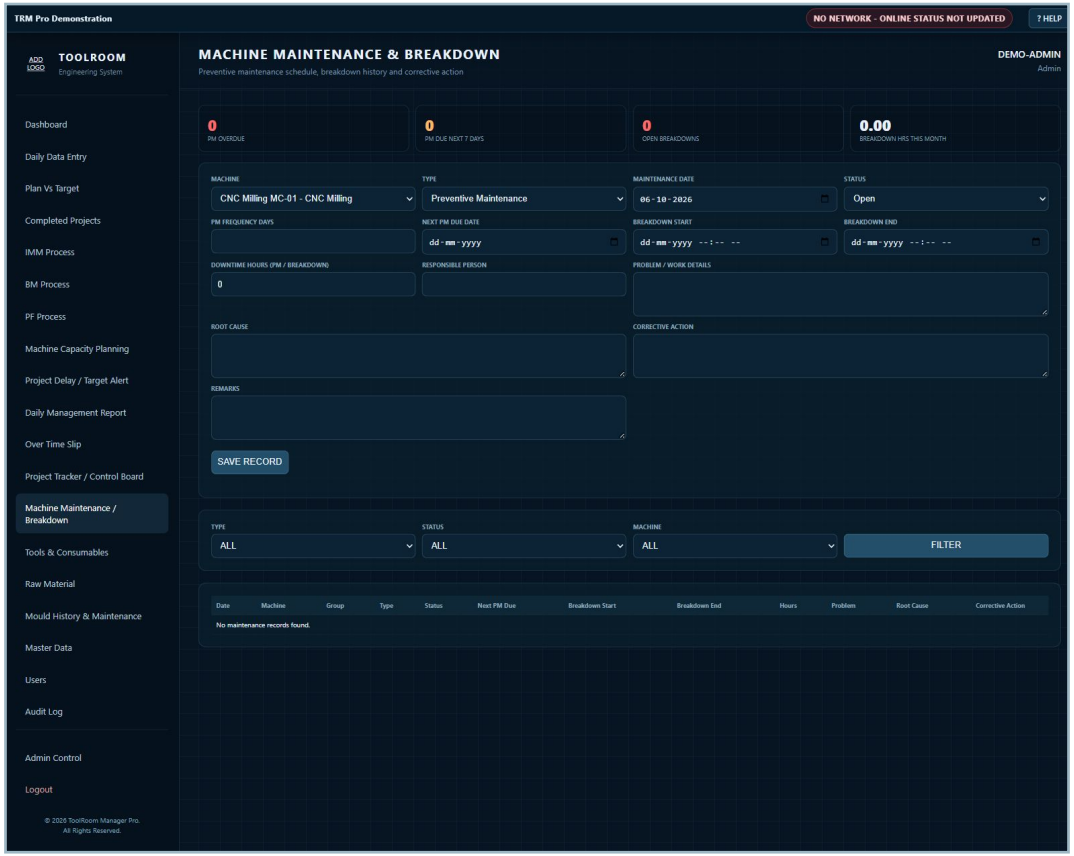
1. Select the machine, event type and requested dates/times.
2. Enter the reason, maintenance/breakdown details and downtime accurately.
3. Save the record and review it in the history/filter view.
4. Only authorized users should add, edit, delete or export maintenance records.

Practical notes

Maintenance affects machine availability and downtime summaries. Do not record a production loss as a maintenance event unless it is actually a maintenance/breakdown occurrence.

26 Machine Maintenance / Breakdown

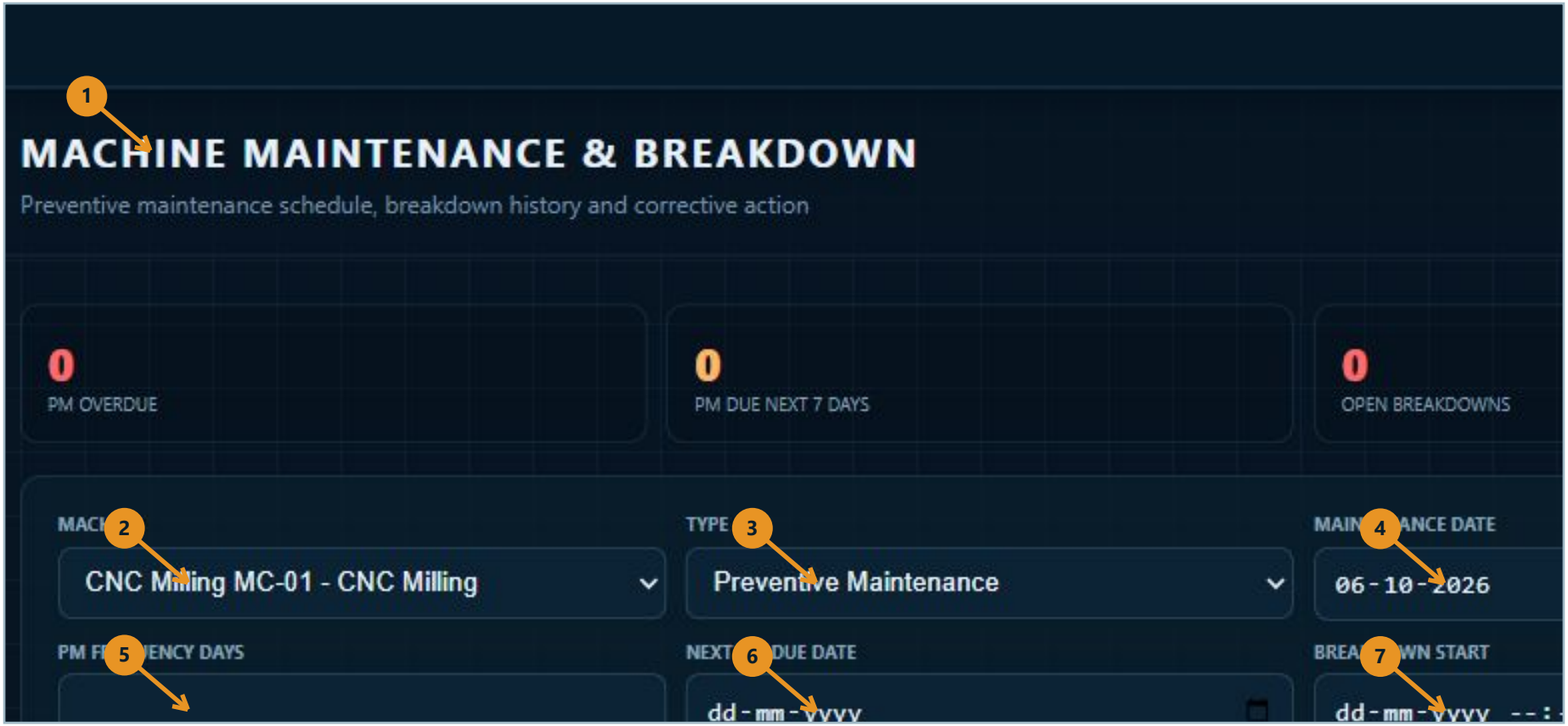
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 01 • orange numbers point to the named controls



1. MACHINE MAINTENANCE & BREAKDOWN
Enter or review this value as labeled

2. Machine
Choose the required value

3. Maintenance Type
Choose the required value

4. MAINTENANCE DATE
Select the actual reference date/time for this record or report

5. PM FREQUENCY DAYS
Enter the numeric quantity/time required by the label

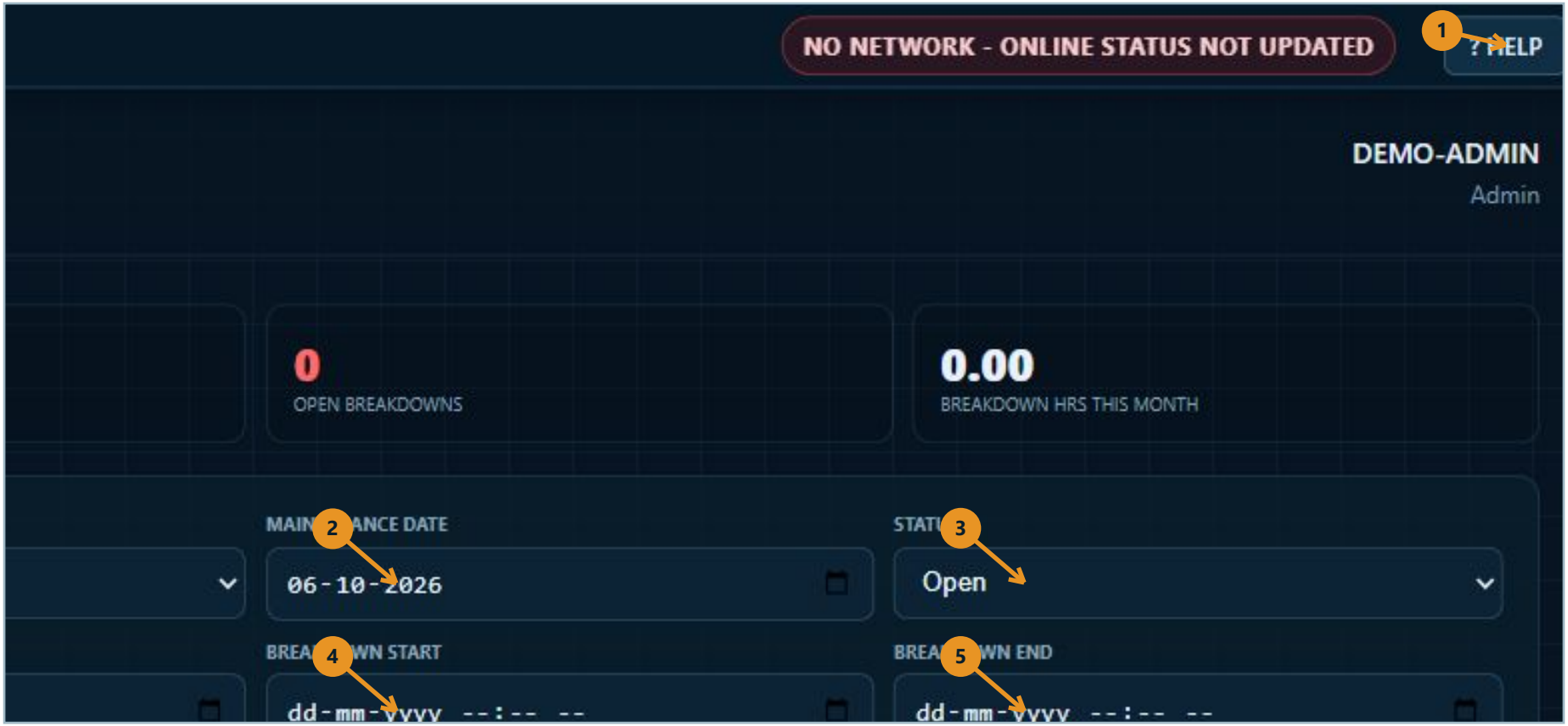
6. NEXT PM DUE DATE
Select the actual reference date/time for this record or report

7. BREAKDOWN START
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. MAINTENANCE DATE
Select the actual reference date/time for this record or report

3. Status
Choose the required value

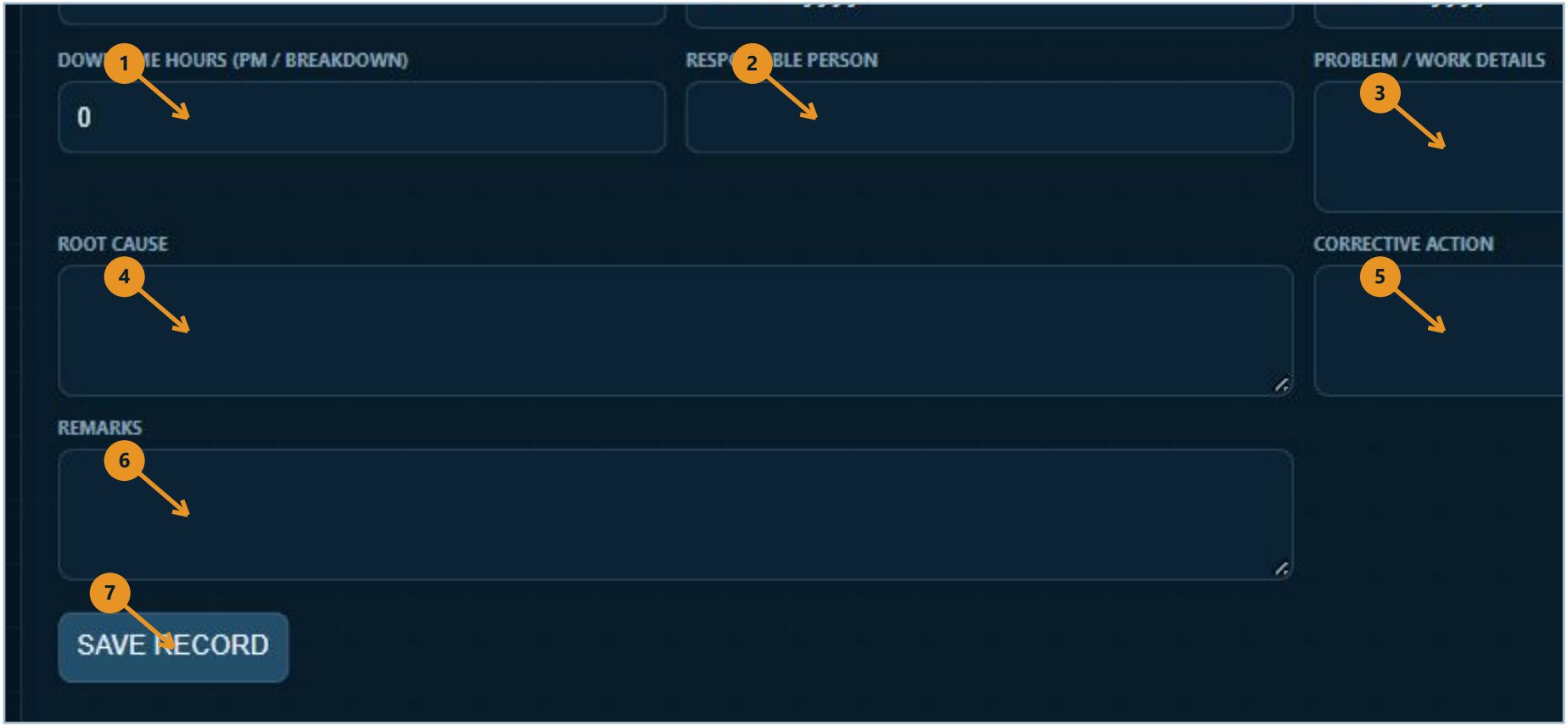
4. BREAKDOWN START
Select the actual reference date/time for this record or report

5. BREAKDOWN END
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 03 • orange numbers point to the named controls



1. DOWNTIME HOURS (PM / BREAKDOWN)
Enter the numeric quantity/time required by the label

2. RESPONSIBLE PERSON
Enter or review this value as labeled

3. PROBLEM / WORK DETAILS
Enter or review this value as labeled

4. ROOT CAUSE
Enter or review this value as labeled

5. CORRECTIVE ACTION
Enter or review this value as labeled

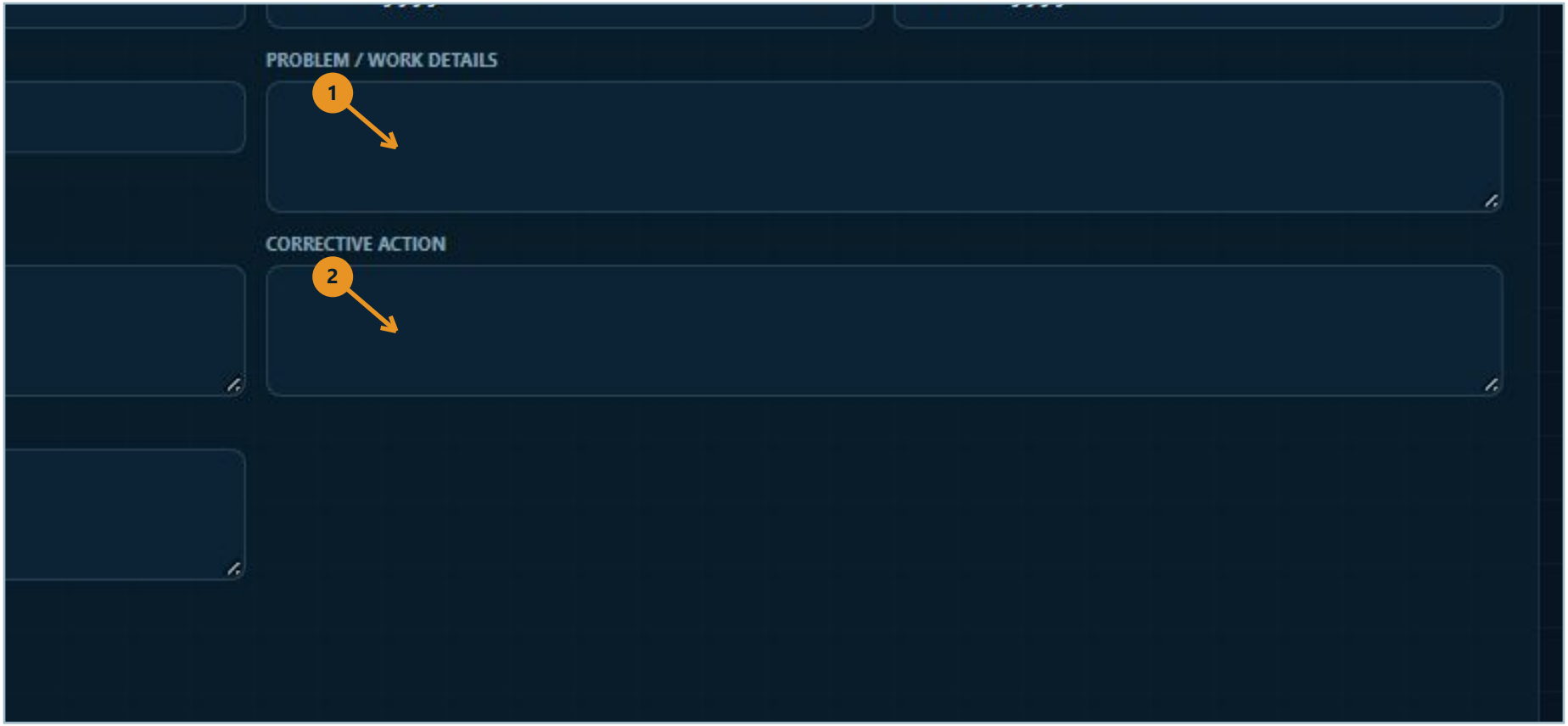
6. REMARKS
Record meaningful instructions or explanation

7. SAVE RECORD
Commit the reviewed fields for this form

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 04 • orange numbers point to the named controls



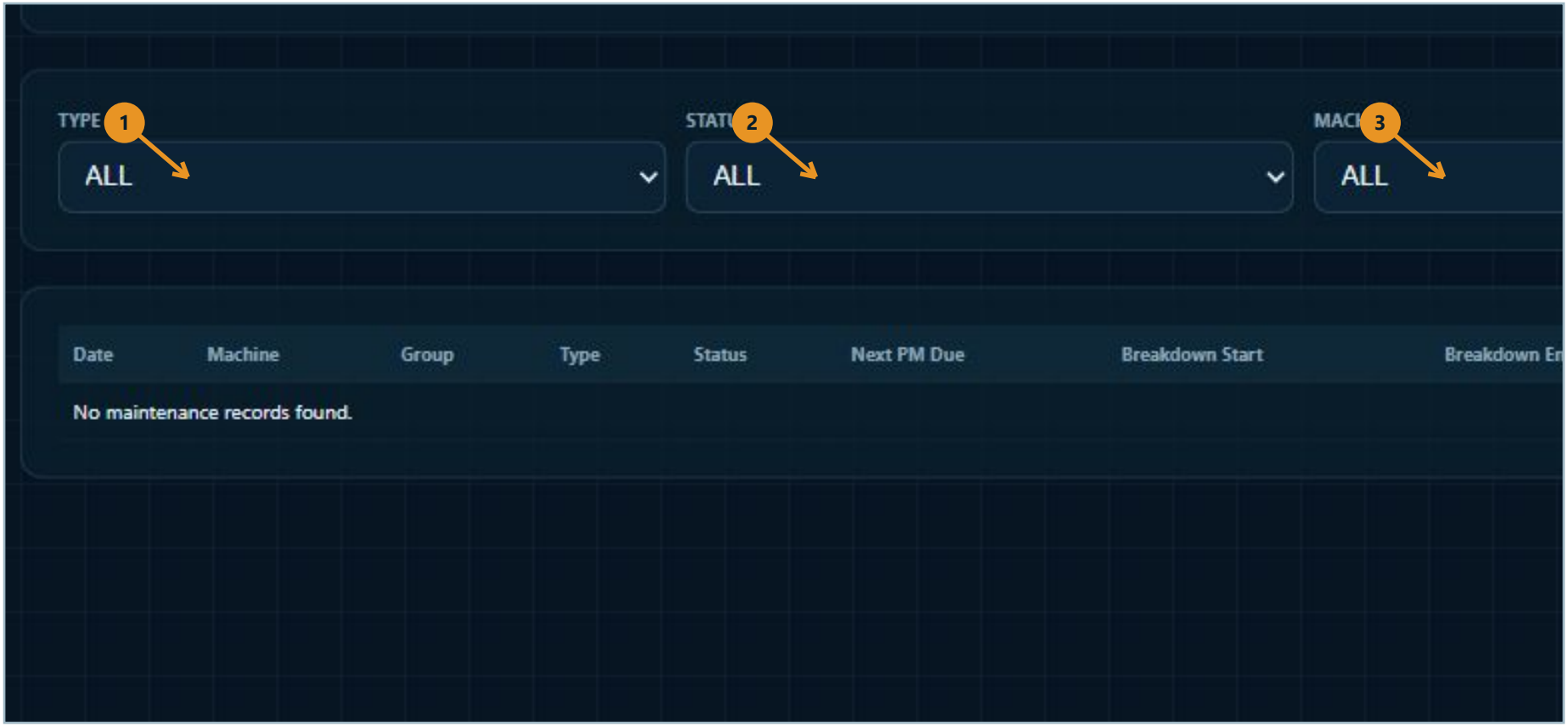
1. PROBLEM / WORK DETAILS
Enter or review this value as labeled

2. CORRECTIVE ACTION
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 05 • orange numbers point to the named controls



1. Type
Choose the required value

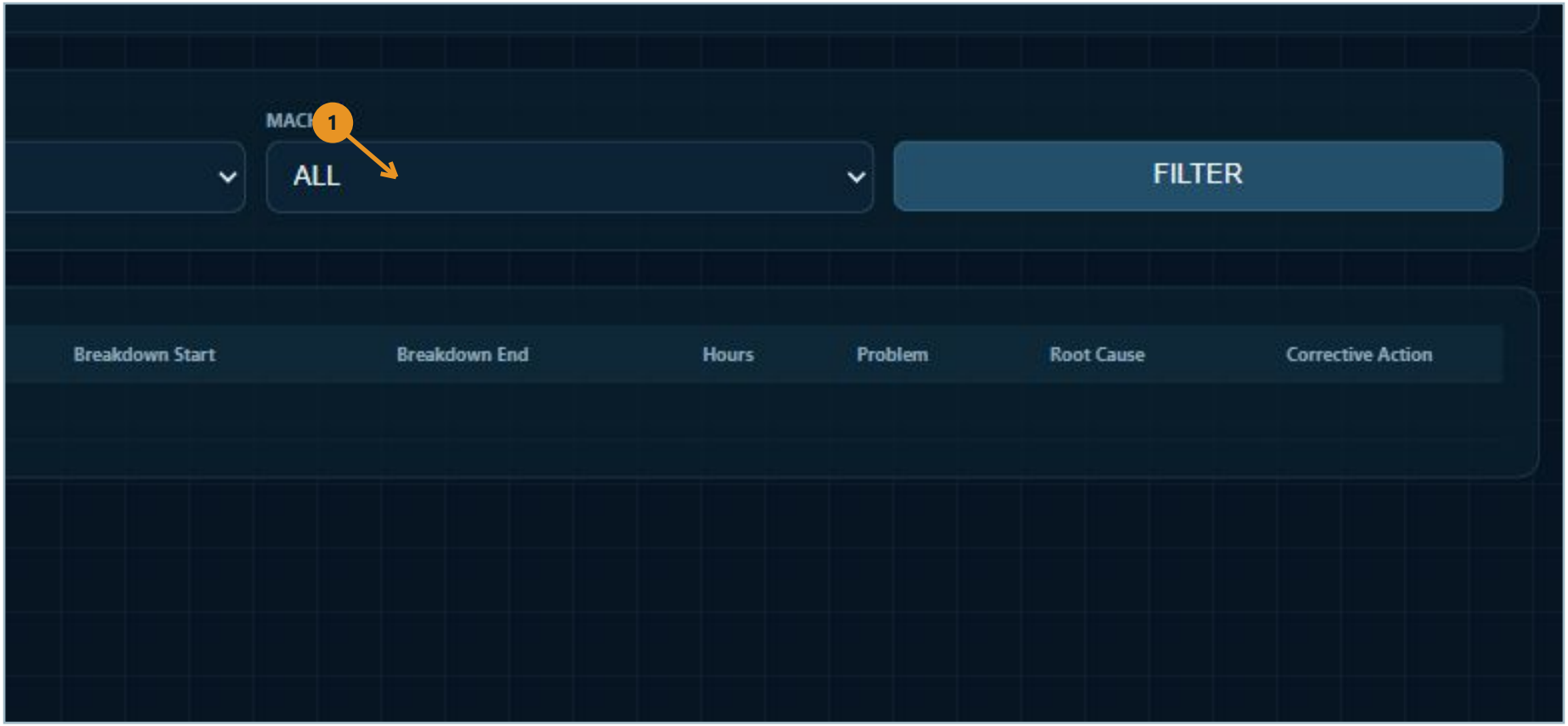
2. Status
Choose the required value

3. Machine
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Illustrated detail 06 • orange numbers point to the named controls



1. Machine
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

26 Machine Maintenance / Breakdown

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MACHINE MAINTENANCE & BREAKDOWN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Machine	Choose the required value. Available choices: CNC Milling MC-01 - CNC Milling; CNC Turning TM-01 - CNC Turning; Band Saw - Convention; EDM-01 - EDM; Wire Cut WC-01 - WIRE-CUT. The displayed records follow this screen's scope and account access.
Maintenance Type	Choose the required value. Available choices: Preventive Maintenance; Breakdown. The displayed records follow this screen's scope and account access.
MAINTENANCE DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Status	Choose the required value. Available choices: Open; In Progress; Completed. The displayed records follow this screen's scope and account access.
PM FREQUENCY DAYS	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
NEXT PM DUE DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
BREAKDOWN START	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
BREAKDOWN END	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
DOWNTIME HOURS (PM / BREAKDOWN)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
RESPONSIBLE PERSON	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PROBLEM / WORK DETAILS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
ROOT CAUSE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
CORRECTIVE ACTION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

26 Machine Maintenance / Breakdown

Control reference continued

REMARKS	Record meaningful instructions or explanation. Do not use remarks to replace the correct numeric fields.
SAVE RECORD	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
Type	Choose the required value. Available choices: ALL; PM; Breakdown. The displayed records follow this screen's scope and account access.
Status	Choose the required value. Available choices: ALL; Open; In Progress; Completed. The displayed records follow this screen's scope and account access.
Machine	Choose the required value. Available choices: ALL; CNC Milling MC-01; CNC Turning TM-01; Band Saw; EDM-01; Wire Cut WC-01. The displayed records follow this screen's scope and account access.

27 Tools & Consumables

Workflow • read before using the illustrated controls

1. Create the item master: code/name, category, specification, make, unit, opening quantity and minimum stock.
2. Record a separate stock entry for Received or Utilized / Issued. Choose item, date and quantity, plus department/machine/employee/project as relevant.
3. Use SAVE STOCK ENTRY and check CURRENT STOCK. Search and Category filter narrow the displayed items.
4. Review RECEIVED / UTILIZED HISTORY. EXPORT EXCEL and EXPORT PDF include the summary and transaction history for the current scope.

Worked example

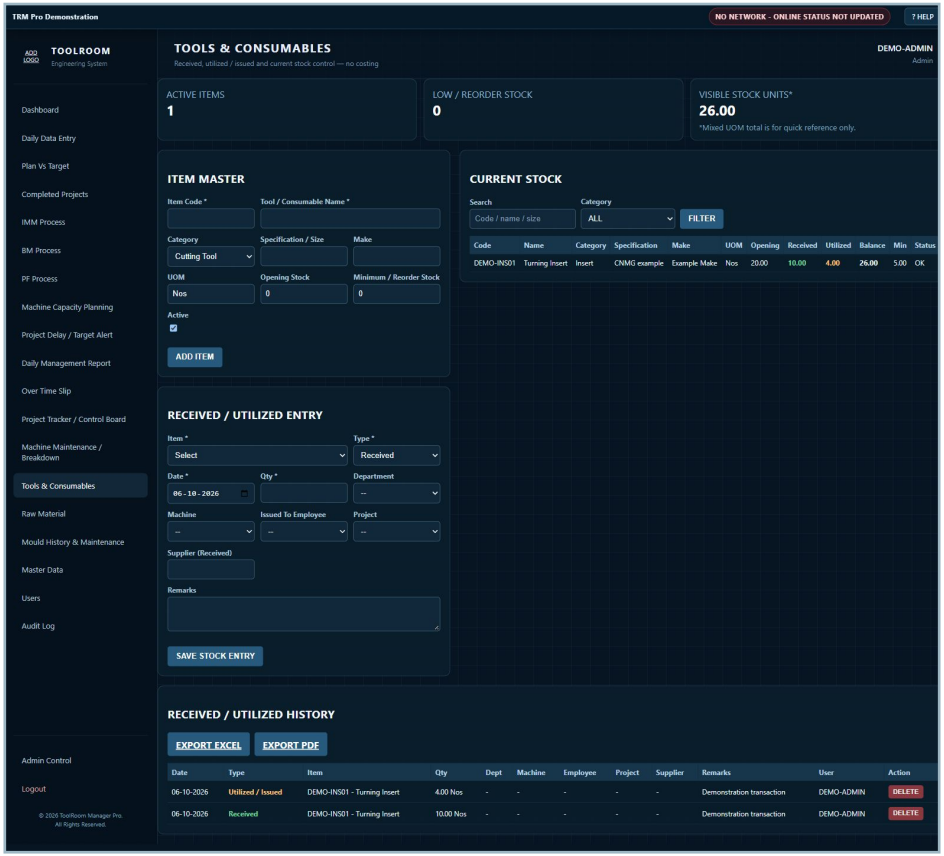
Opening 20 + Received 10 − Utilized 4 = Balance 26. The demonstration screenshot shows this calculation.

Practical notes

Opening stock is the initial balance; do not repeatedly enter the same opening quantity as a new receipt. Use received entries for later purchases. Match the item unit consistently.

27 Tools & Consumables

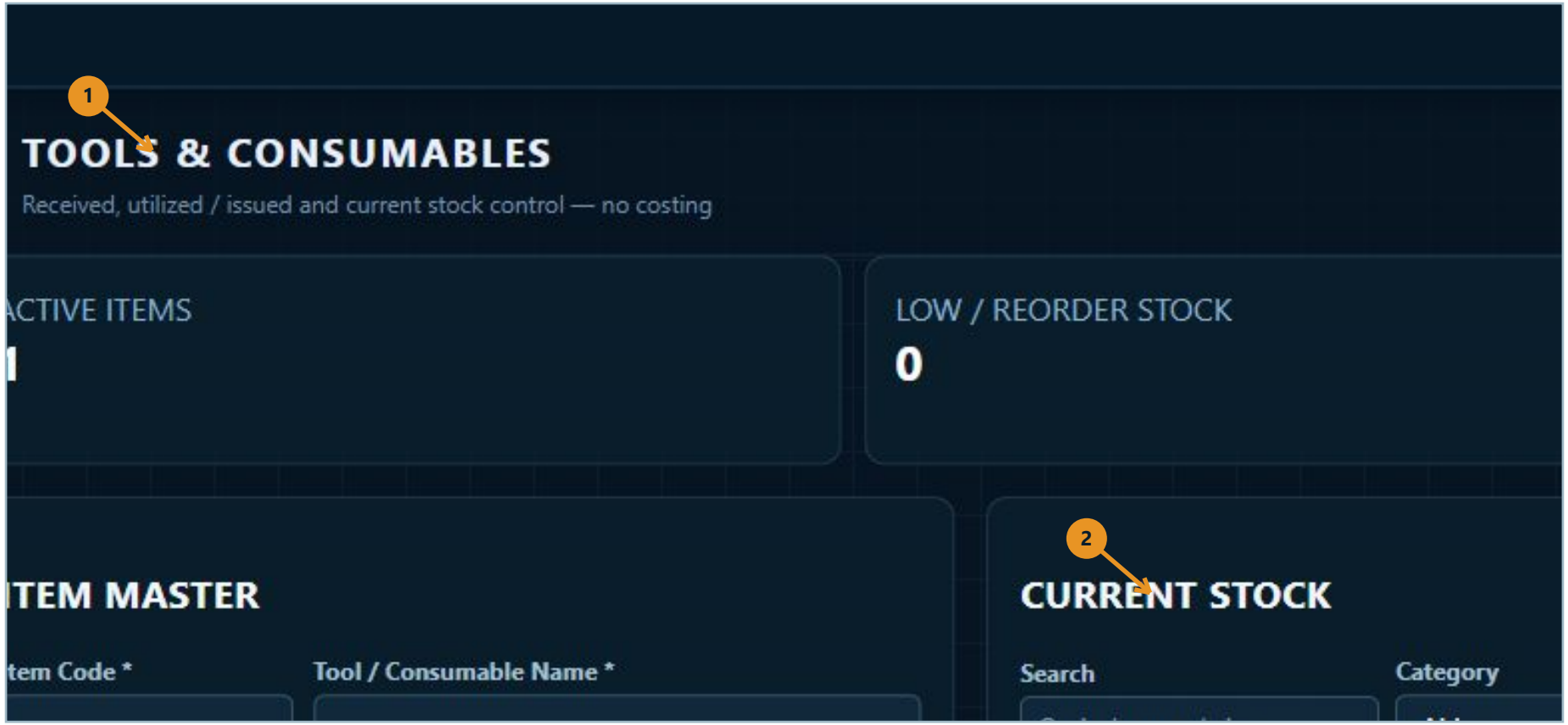
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 01 • orange numbers point to the named controls



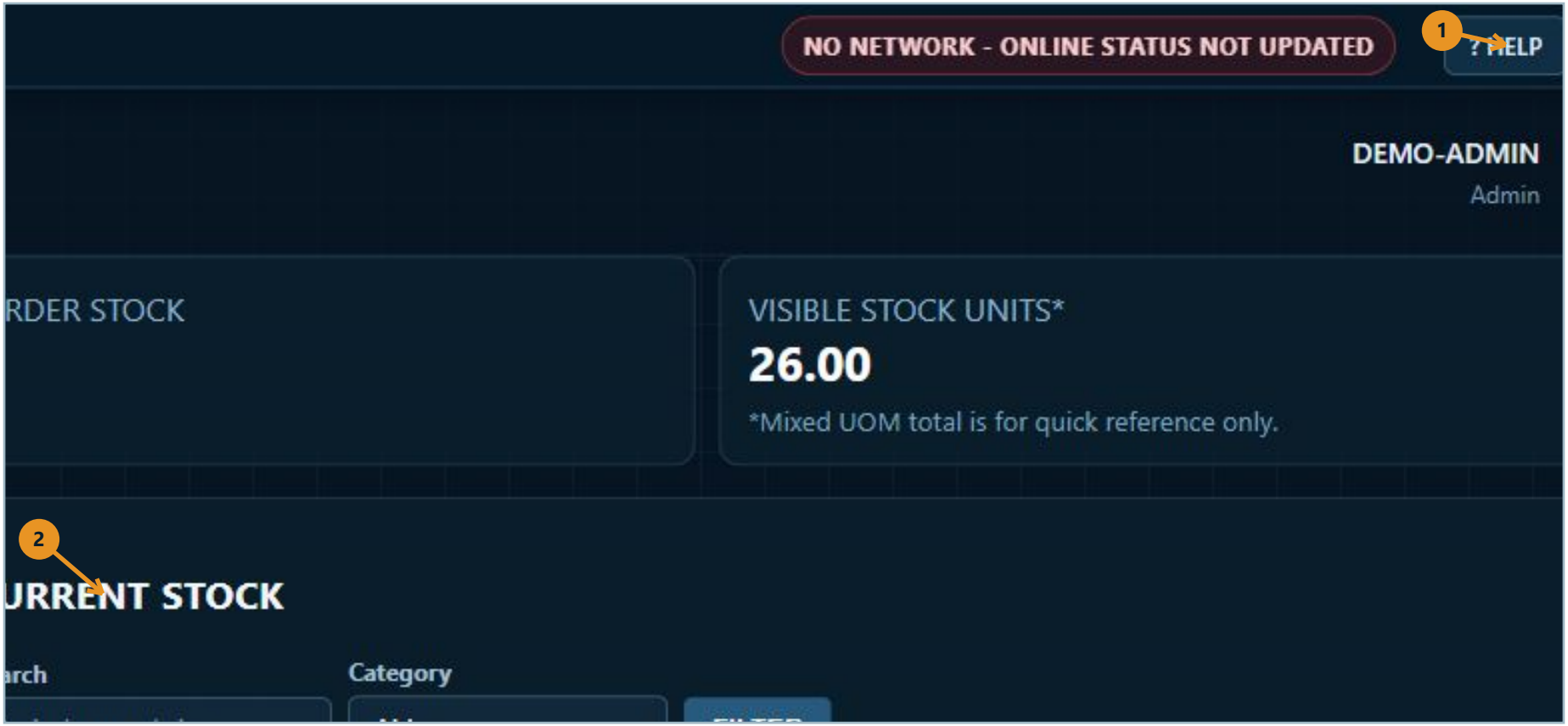
1. TOOLS & CONSUMABLES
Enter or review this value as labeled

2. CURRENT STOCK
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. CURRENT STOCK
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 03 • orange numbers point to the named controls



1. Tool / Consumable Name *
Enter or review this value as labeled

2. Specification / Size
Enter or review this value as labeled

3. Make
Enter or review this value as labeled

4. Opening Stock
Enter the numeric quantity/time required by the label

5. Minimum / Reorder Stock
Enter the numeric quantity/time required by the label

6. Active
Tick to enable this option; clear to disable it

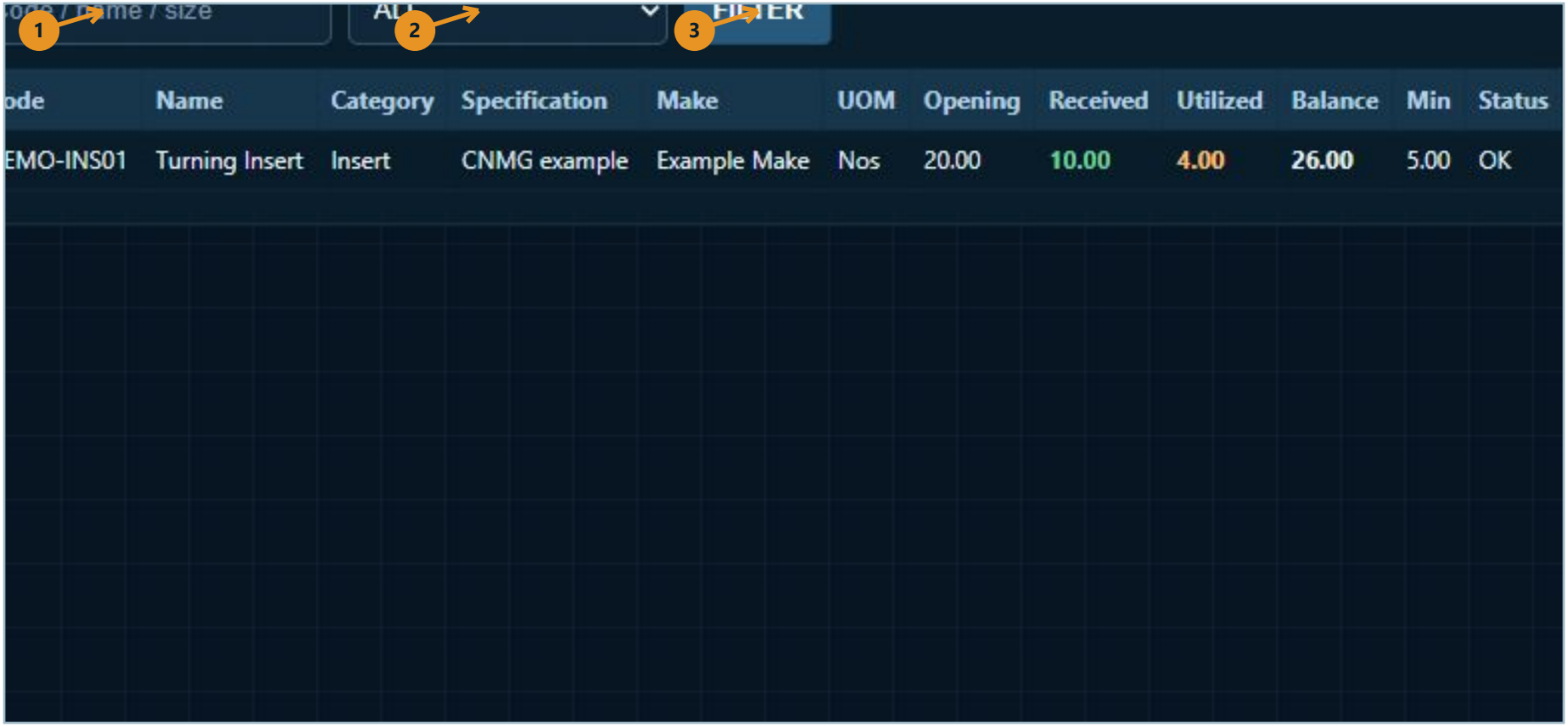
7. Search
Enter or review this value as labeled

8. Category
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 04 • orange numbers point to the named controls



1. Search
Enter or review this value as labeled

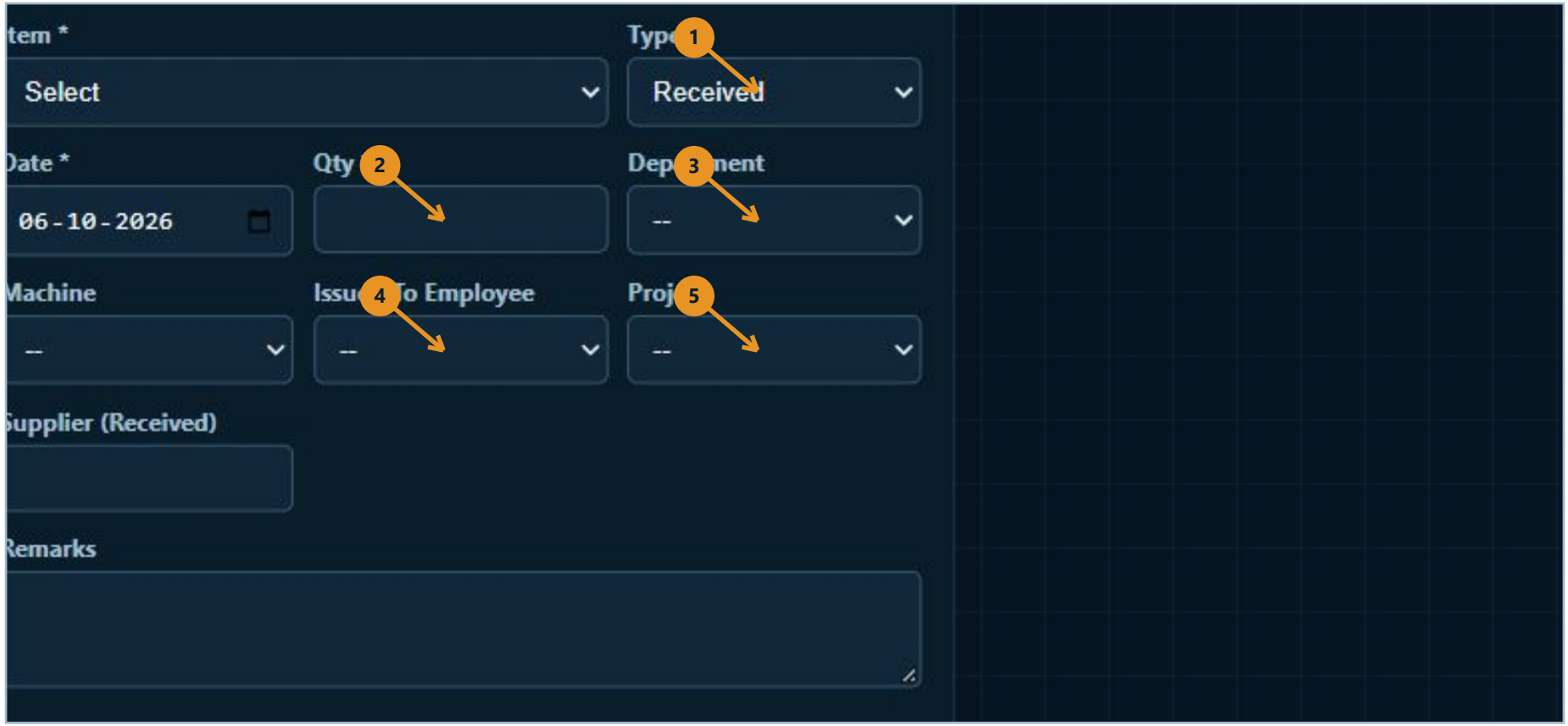
2. Category
Choose the required value

3. FILTER
Apply the selected filters and refresh the displayed results

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 05 • orange numbers point to the named controls



1. Transaction Type
Choose the required value

2. Qty *
Enter the numeric quantity/time required by the label

3. Department
Choose the required value

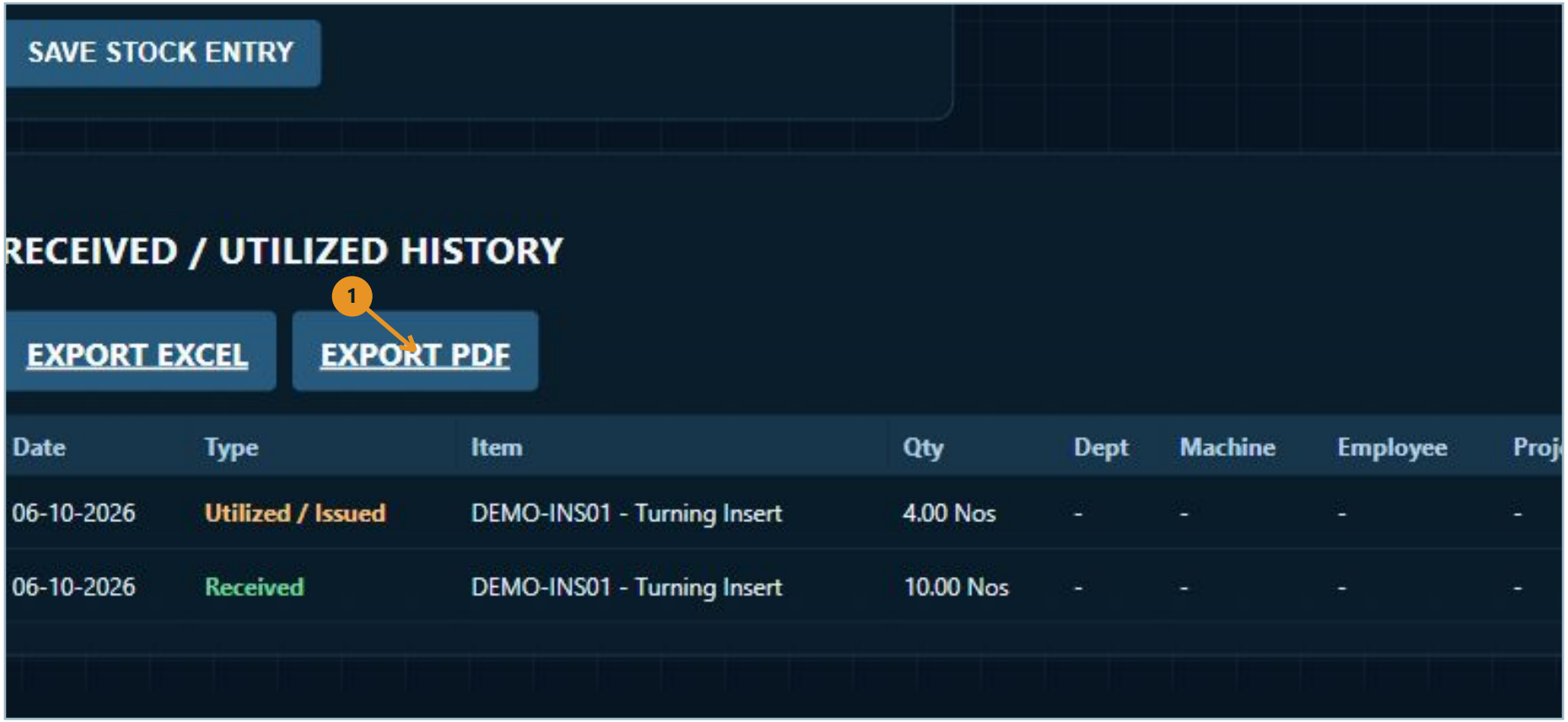
4. Employee
Choose the required value

5. Project
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 06 • orange numbers point to the named controls

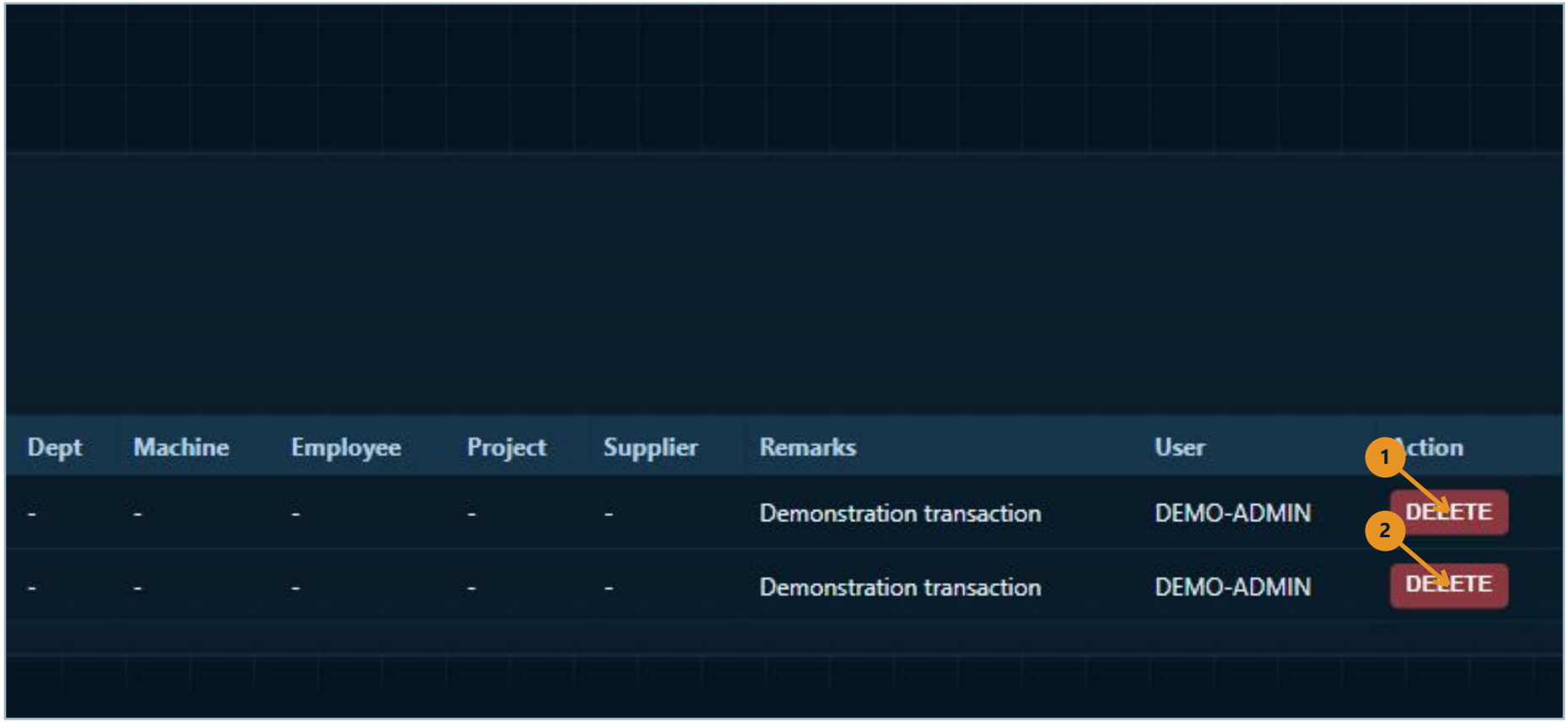


1. EXPORT PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Illustrated detail 07 • orange numbers point to the named controls



1. DELETE
Remove the selected record/attachment only with authorization

2. DELETE
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

27 Tools & Consumables

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
TOOLS & CONSUMABLES	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Tool / Consumable Name *	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Specification / Size	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Make	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Opening Stock	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Minimum / Reorder Stock	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Active	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.
Transaction Type	Choose the required value. Available choices: Received; Utilized / Issued. The displayed records follow this screen's scope and account access.
Qty *	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Department	Choose the required value. Available choices: --; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Employee	Choose the required value. Available choices: --. The displayed records follow this screen's scope and account access.
Project	Choose the required value. Available choices: --. The displayed records follow this screen's scope and account access.
Search	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Category	Choose the required value. Available choices: ALL; Cutting Tool; Insert; Holder; Collet; Grinding; EDM; Wire EDM; Lubricant; Consumable; Other. The displayed records follow this screen's scope and account access.

FILTER	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.
EXPORT PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
DELETE	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.

28 Raw Material: receipt, issue and return

Workflow • read before using the illustrated controls

1. In ENTRY RAW MATERIAL select Opening Stock for the initial balance or the relevant receipt type for a later delivery. Enter department/project, supplier, invoice/date, form, grade, size, quantity/unit, rack/tag and store keeper.
2. Choose Project No. to display its name where applicable. The receiving employee should belong to Store Keeper. Save with ADD RAW MATERIAL.
3. In RECEIVED / UTILIZED ENTRY choose date, department, project and part. Select Material Form / Type and Grade; then select the matching Size / Stock item.
4. Enter Qty Utilized, Expected Return Length and Expected Return Qty. Collected By User defaults to the signed-in user. Add remarks and ISSUE / UTILIZE MATERIAL.
5. Review MATERIAL TO BE RETURNED by collector/project. When material arrives back, enter actual returned length/quantity, received date and receiving store keeper, then click RECEIVED.
6. Check current stock, stock receipt history and issue/return history. EXCEL/PDF exports provide a consolidated material ledger with receipts, utilization/returns and balance.

Worked example

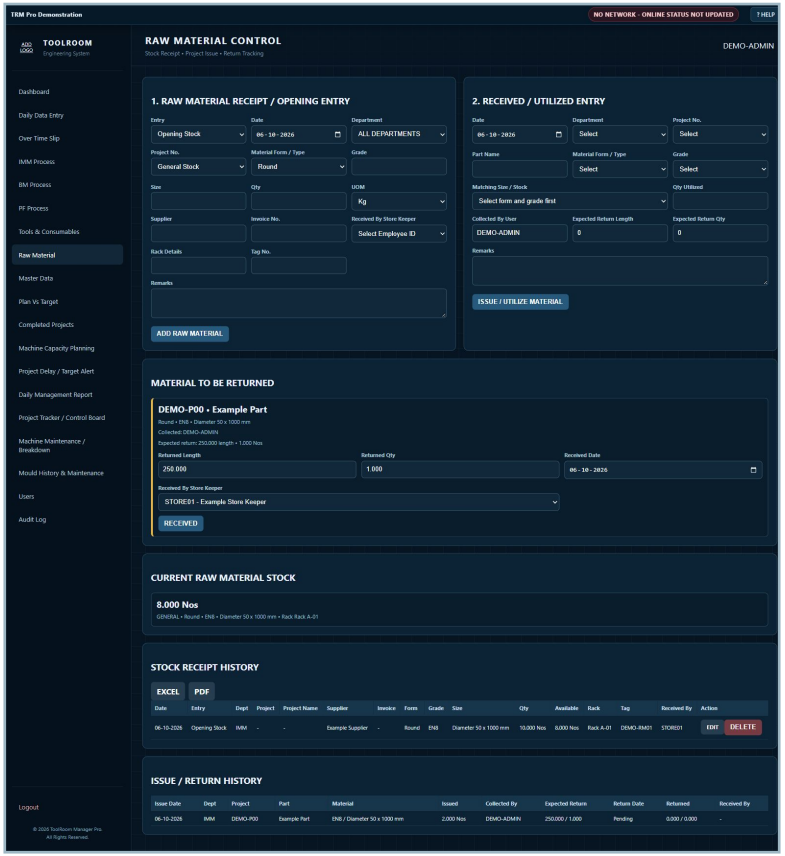
Opening 10 Nos; issue 2 Nos leaves 8 Nos. Expected return 1 Nos remains pending until actually received. Receiving that 1 Nos later increases the stock to 9 Nos.

Practical notes

Expected return is not available stock. Record the actual return only once. Use the same material form, grade and size/unit to avoid mixing stock. Do not recreate a duplicate receipt to disguise an issue or pending return.

28 Raw Material: receipt, issue and return

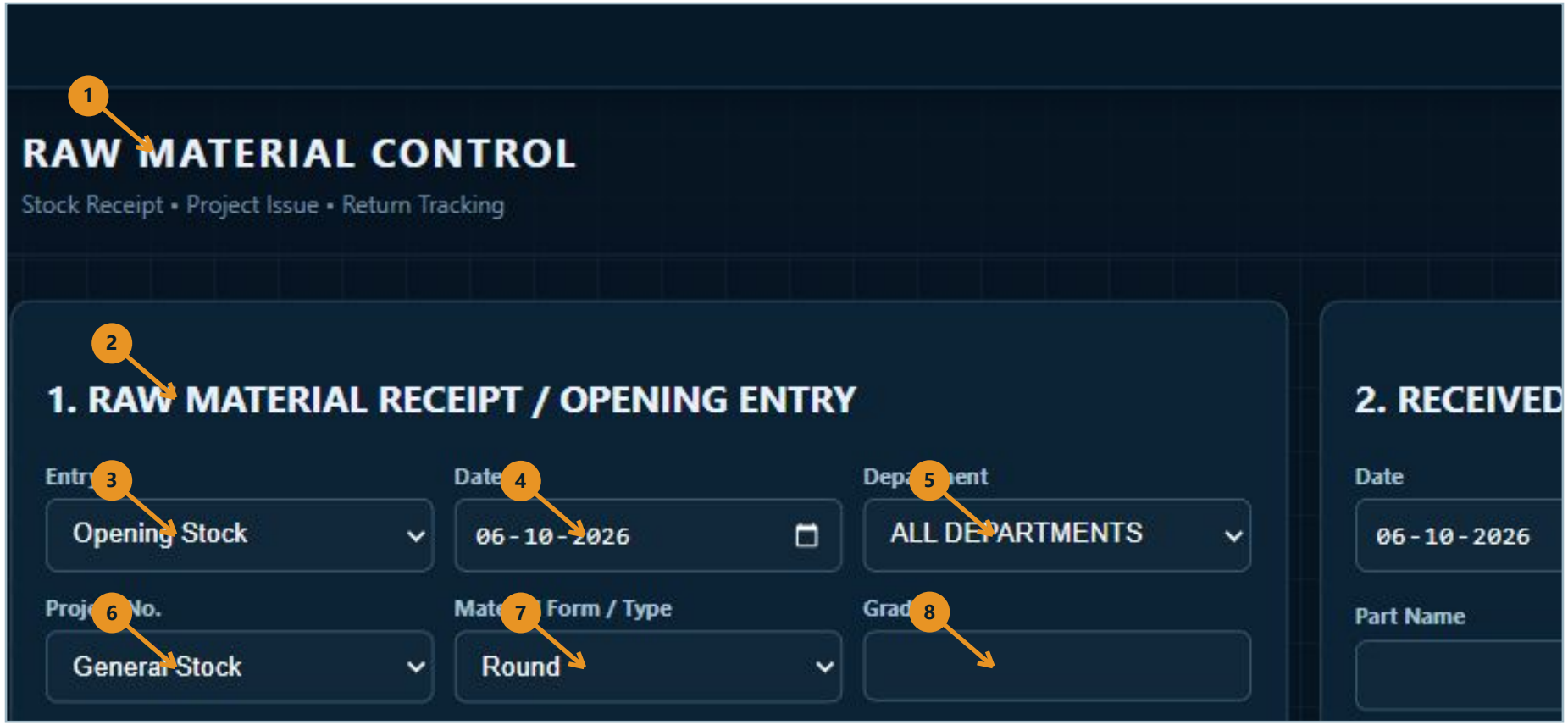
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 01 • orange numbers point to the named controls



1. RAW MATERIAL CONTROL
Enter or review this value as labeled

2. 1. RAW MATERIAL RECEIPT / OPENING ENTRY
Read this section heading before using the controls below it.

3. Entry Type
Choose the required value

4. Date
Select the actual reference date/time for this record or report

5. Department
Choose the required value

6. Project
Choose the required value

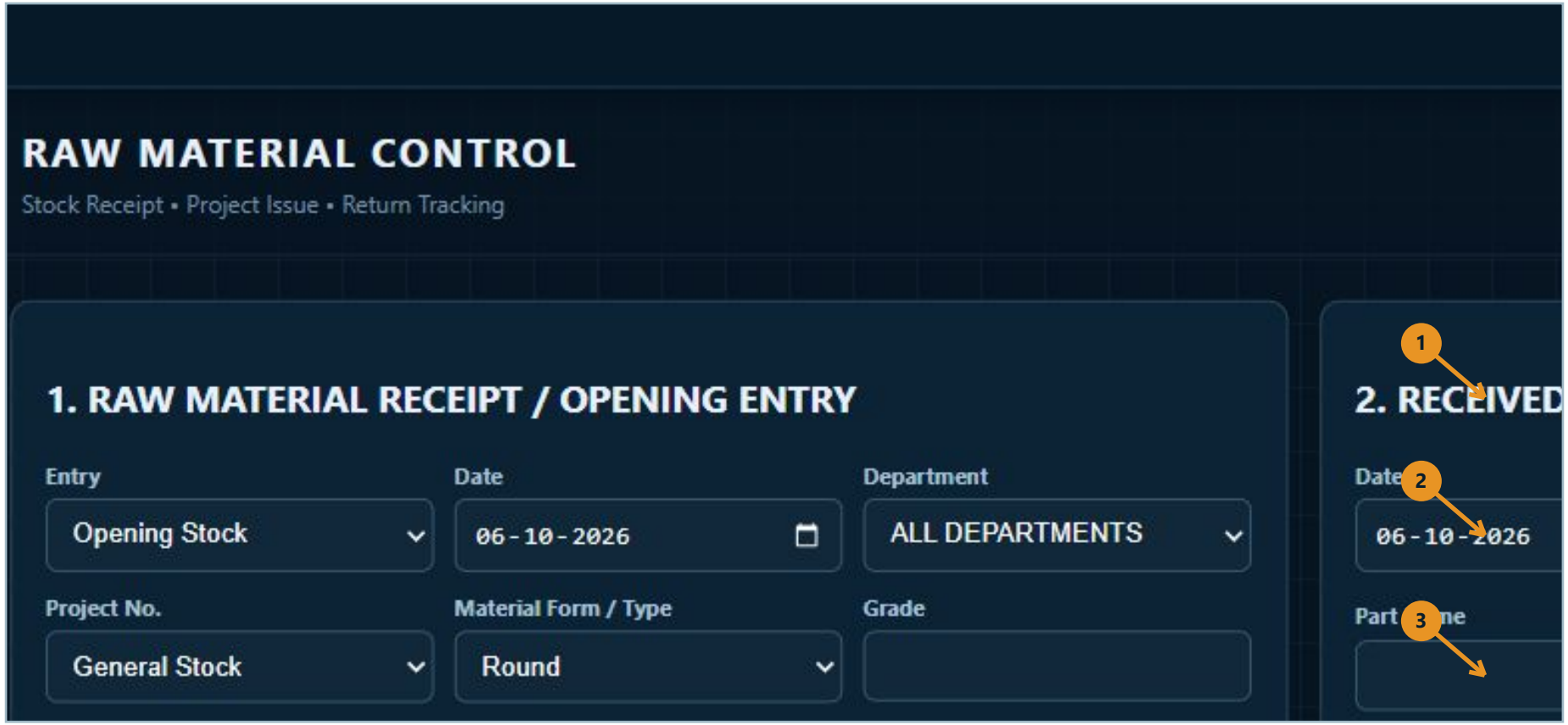
7. Material Shape
Choose the required value

8. Grade
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 02 • orange numbers point to the named controls



1. 2. RECEIVED / UTILIZED ENTRY
Read this section heading before using the controls below it.

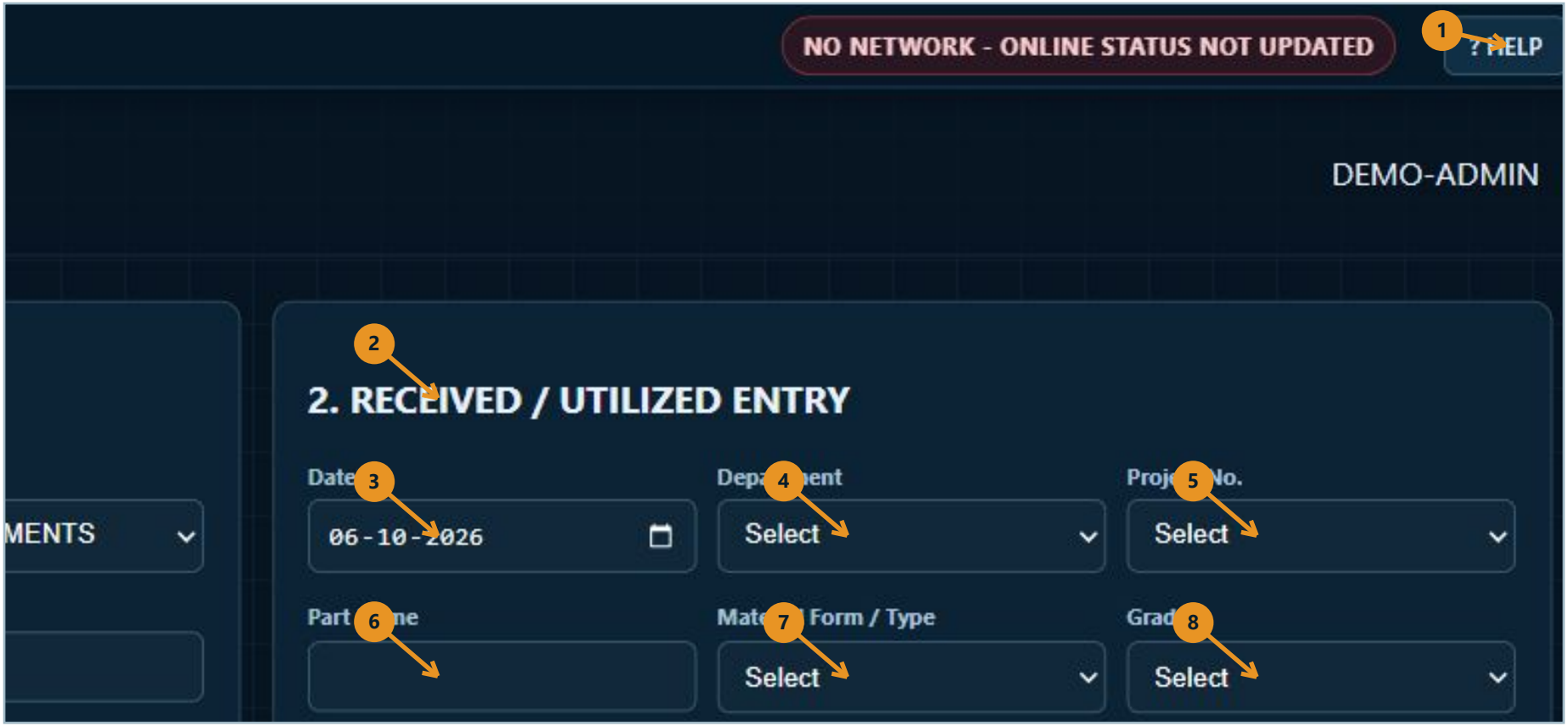
2. Date
Select the actual reference date/time for this record or report

3. Part Name
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 03 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. 2. RECEIVED / UTILIZED ENTRY
Read this section heading before using the controls below it.

3. Date
Select the actual reference date/time for this record or report

4. Department
Choose the required value

5. Project
Choose the required value

6. Part Name
Enter or review this value as labeled

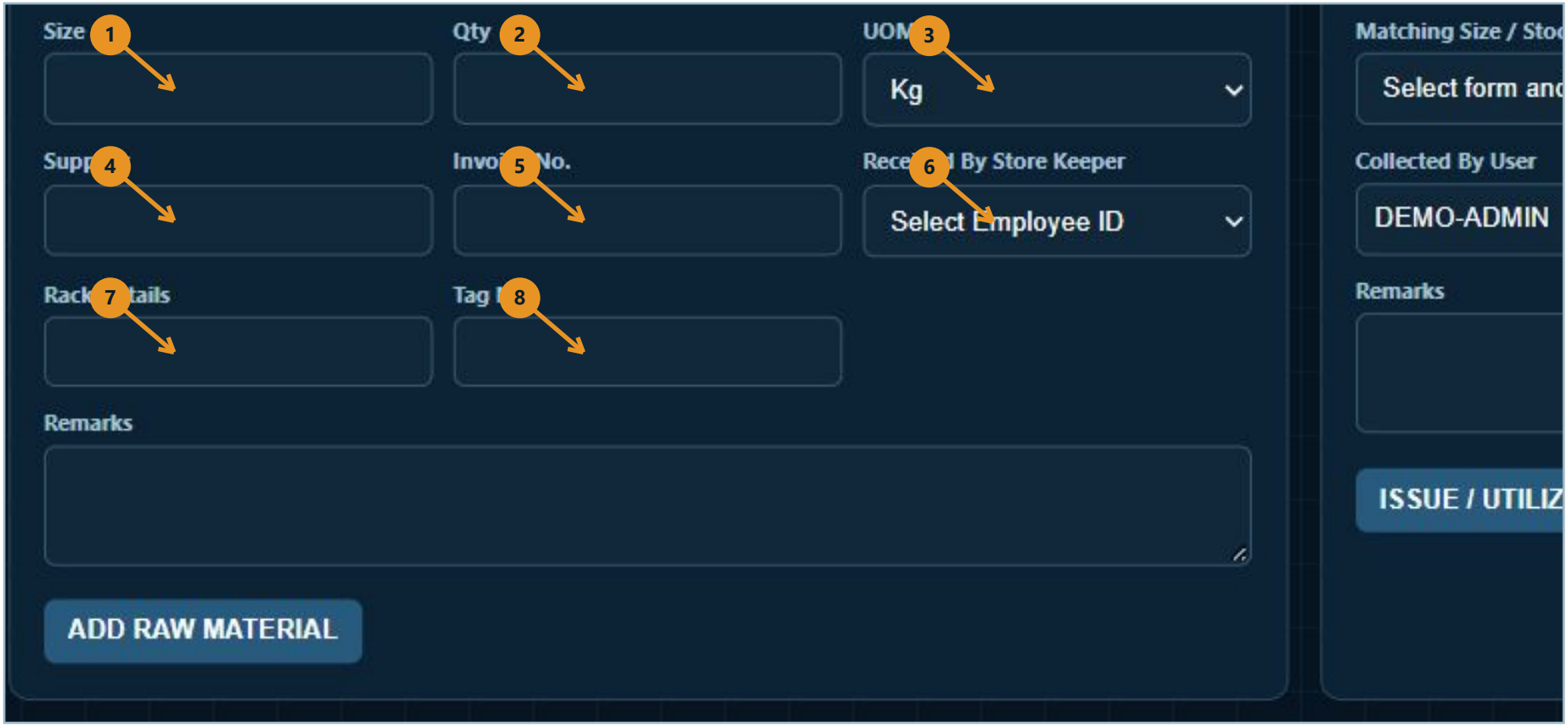
7. Material Form / Type
Choose the required value

8. Grade
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 04 • orange numbers point to the named controls



1. Size
Enter or review this value as labeled

2. Qty
Enter the numeric quantity/time required by the label

3. Uom
Choose the required value

4. Supplier
Enter or review this value as labeled

5. Invoice No.
Enter or review this value as labeled

6. Received By
Choose the required value

7. Rack Details
Enter or review this value as labeled

8. Tag No.
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 05 • orange numbers point to the named controls



1. Remarks
Record meaningful instructions or explanation

2. ADD RAW MATERIAL
Commit the reviewed fields for this form

3. Source Entry
Choose the required value

4. Collected By User
Enter or review this value as labeled

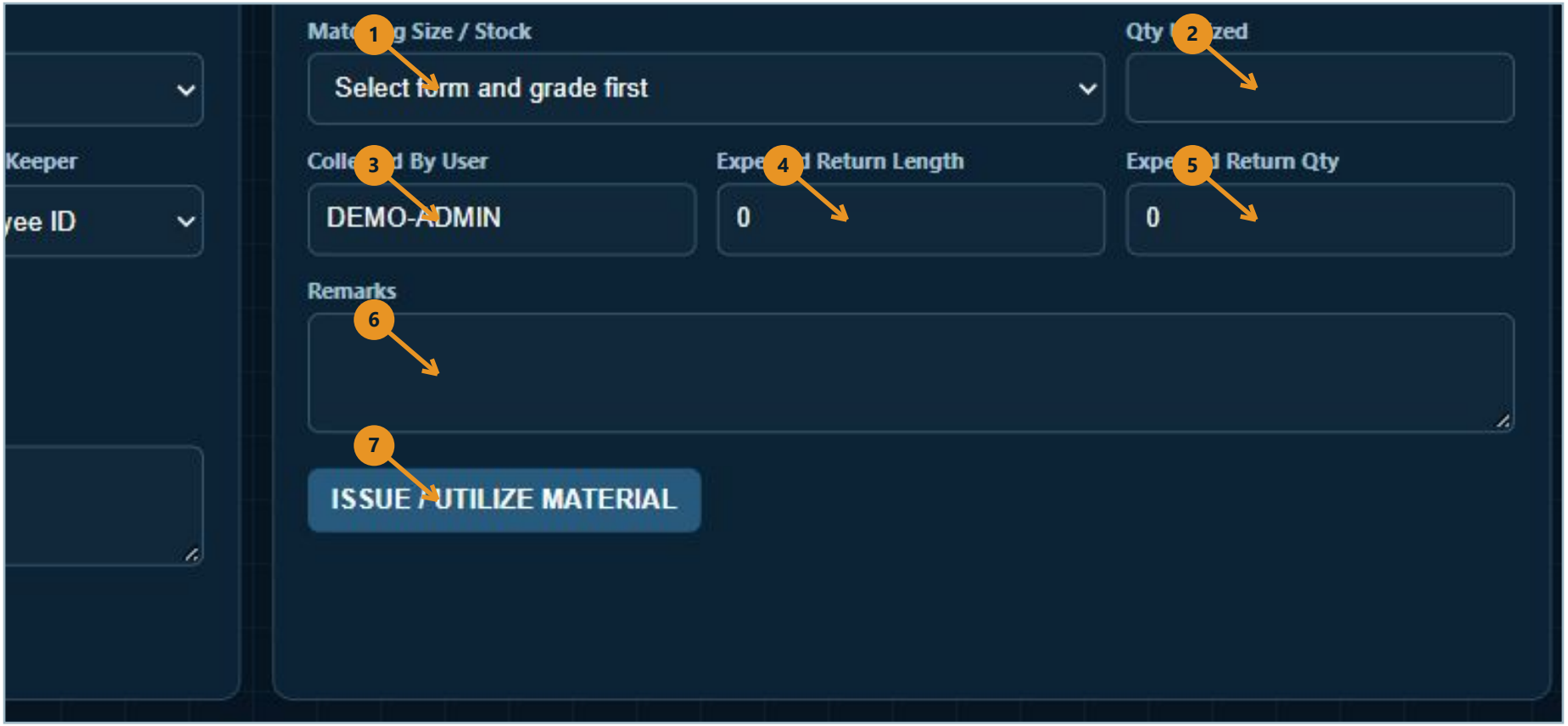
5. Remarks
Record meaningful instructions or explanation

6. ISSUE / UTILIZE MATERIAL
Commit the reviewed fields for this form

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 06 • orange numbers point to the named controls



1. Source Entry
Choose the required value

2. Qty Utilized
Enter the numeric quantity/time required by the label

3. Collected By User
Enter or review this value as labeled

4. Expected Return Length
Enter the numeric quantity/time required by the label

5. Expected Return Qty
Enter the numeric quantity/time required by the label

6. Remarks
Record meaningful instructions or explanation

7. ISSUE / UTILIZE MATERIAL
Commit the reviewed fields for this form

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 07 • orange numbers point to the named controls



1. MATERIAL TO BE RETURNED
Read this section heading before using the controls below it.

2. Returned Length
Enter the numeric quantity/time required by the label

3. Returned Qty
Enter the numeric quantity/time required by the label

4. Return Received By
Choose the required value

5. RECEIVED
Commit the reviewed fields for this form

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 08 • orange numbers point to the named controls



1. Received Date
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 09 • orange numbers point to the named controls



1. CURRENT RAW MATERIAL STOCK
Read this section heading before using the controls below it.

2. STOCK RECEIPT HISTORY
Read this section heading before using the controls below it.

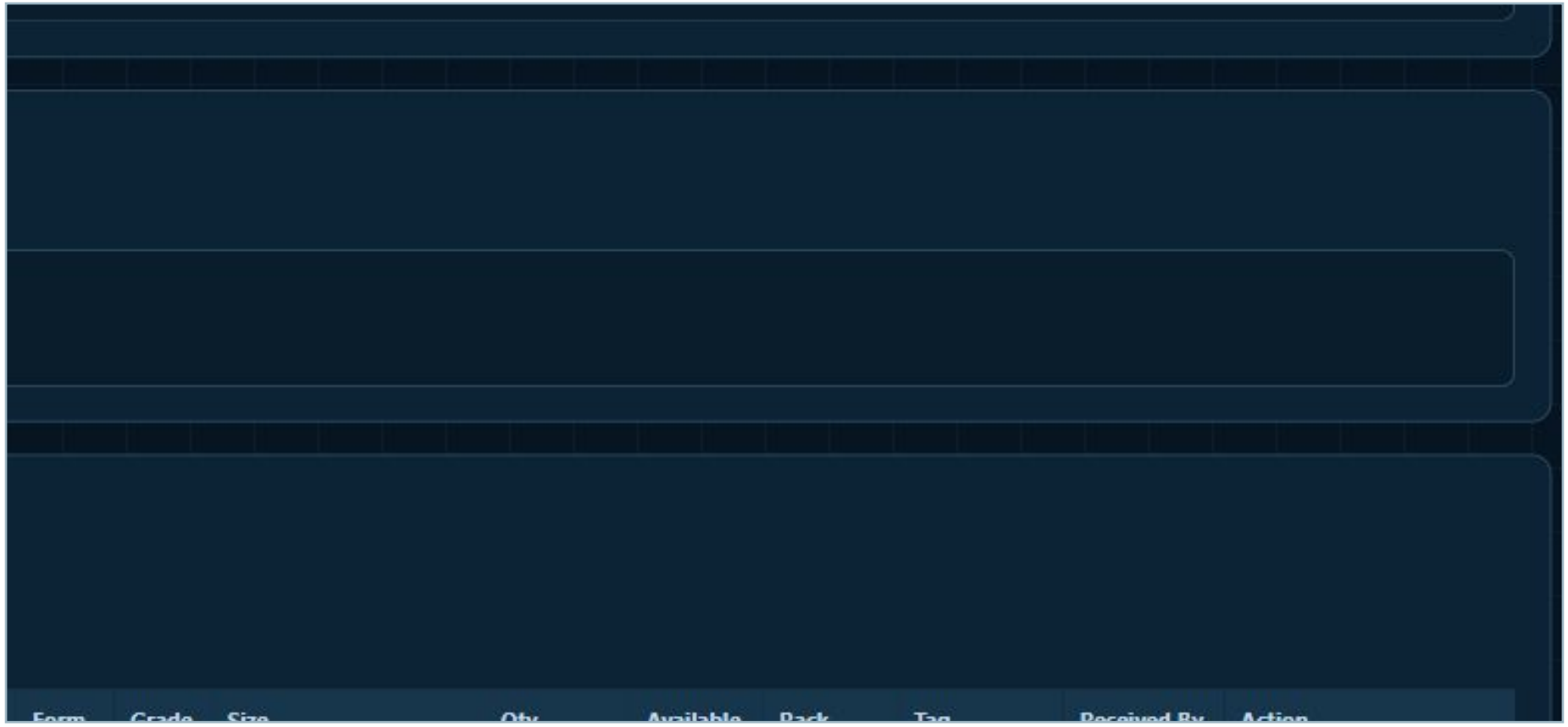
3. EXCEL
Export the current report/stock scope in the indicated format

4. PDF
Export the current report/stock scope in the indicated format

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

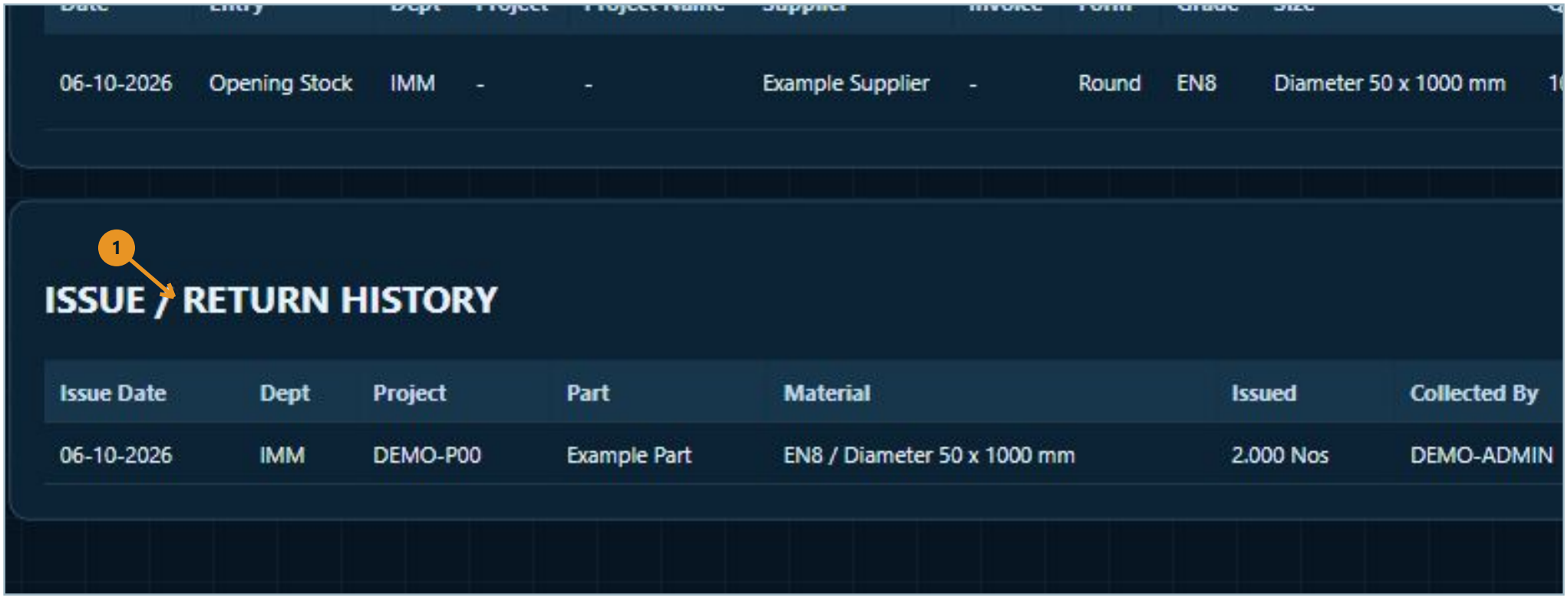
Illustrated detail 10 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 11 • orange numbers point to the named controls

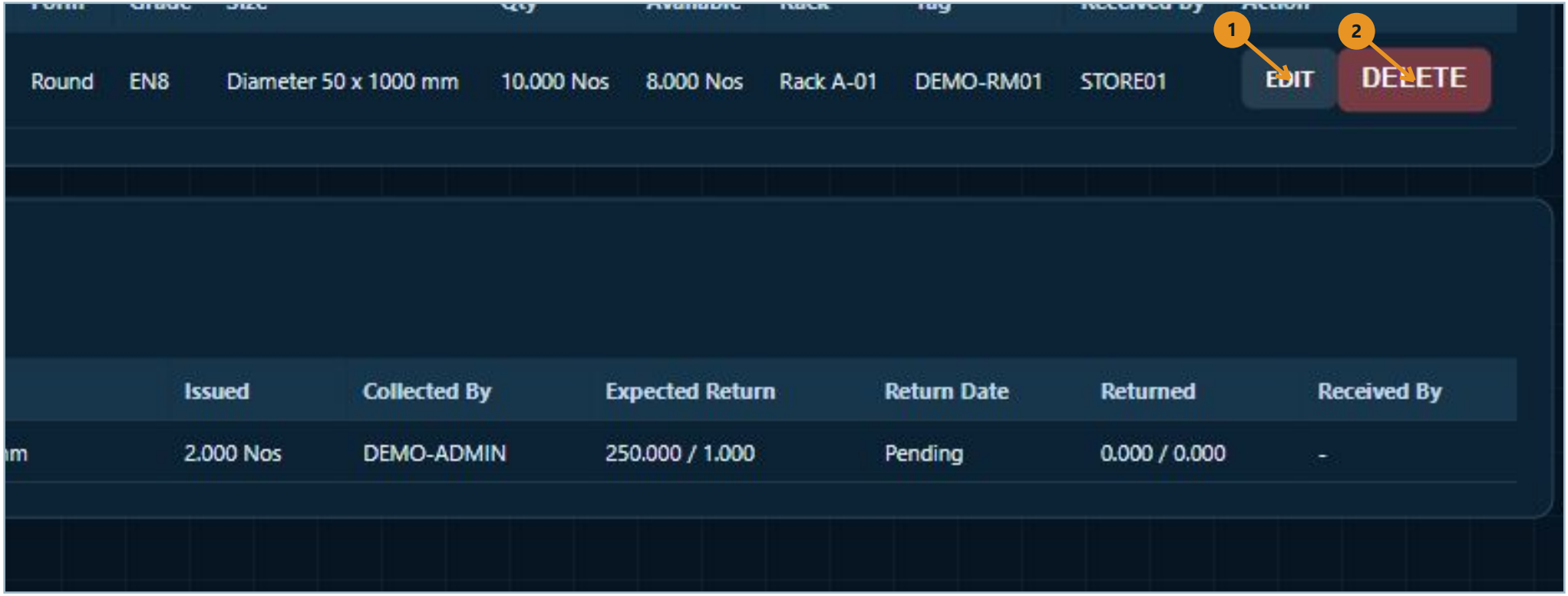


1. ISSUE / RETURN HISTORY
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Illustrated detail 12 • orange numbers point to the named controls



1. EDIT
Open the selected saved record for correction

2. DELETE
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

28 Raw Material: receipt, issue and return

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
RAW MATERIAL CONTROL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Entry Type	Choose the required value. Available choices: Opening Stock; Received; Adjustment. The displayed records follow this screen’s scope and account access.
Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Department	Choose the required value. Available choices: ALL DEPARTMENTS; IMM; BM; PF. The displayed records follow this screen’s scope and account access.
Project	Choose the required value. Available choices: General Stock. The displayed records follow this screen’s scope and account access.
Material Shape	Choose the required value. Available choices: Round; Flat; Hex; Square; Plate; Sheet; Tube; Other. The displayed records follow this screen’s scope and account access.
Grade	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Size	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Qty	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Uom	Choose the required value. Available choices: Kg; Nos; Metre; Plate; Sheet. The displayed records follow this screen’s scope and account access.
Supplier	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Invoice No.	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Received By	Choose the required value. Available choices: Select Employee ID. The displayed records follow this screen’s scope and account access.

Rack Details	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Tag No.	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Remarks	Record meaningful instructions or explanation. Do not use remarks to replace the correct numeric fields.
ADD RAW MATERIAL	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
Department	Choose the required value. Available choices: Select; IMM; BM; PF. The displayed records follow this screen’s scope and account access.
Project	Choose the required value. Available choices: Select. The displayed records follow this screen’s scope and account access.
Part Name	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Material Form / Type	Choose the required value. Available choices: Select; Round; Flat; Hex; Square; Plate; Sheet; Tube; Other. The displayed records follow this screen’s scope and account access.
Grade	Choose the required value. Available choices: Select; EN8. The displayed records follow this screen’s scope and account access.
Source Entry	Choose the required value. Available choices: Select form and grade first; Diameter 50 x 1000 mm • Available 8.000 Nos. The displayed records follow this screen’s scope and account access.
Qty Utilized	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Collected By User	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Expected Return Length	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Expected Return Qty	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
ISSUE / UTILIZE MATERIAL	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.

Returned Length	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Returned Qty	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Received Date	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Return Received By	Choose the required value. Available choices: Records created in Master Data for this installation. The displayed records follow this screen's scope and account access.
RECEIVED	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
EXCEL	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
EDIT	Open the selected saved record for correction. Review and save the changes; Edit permission is required.
DELETE	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.

29 Mould History & Maintenance

Workflow • read before using the illustrated controls

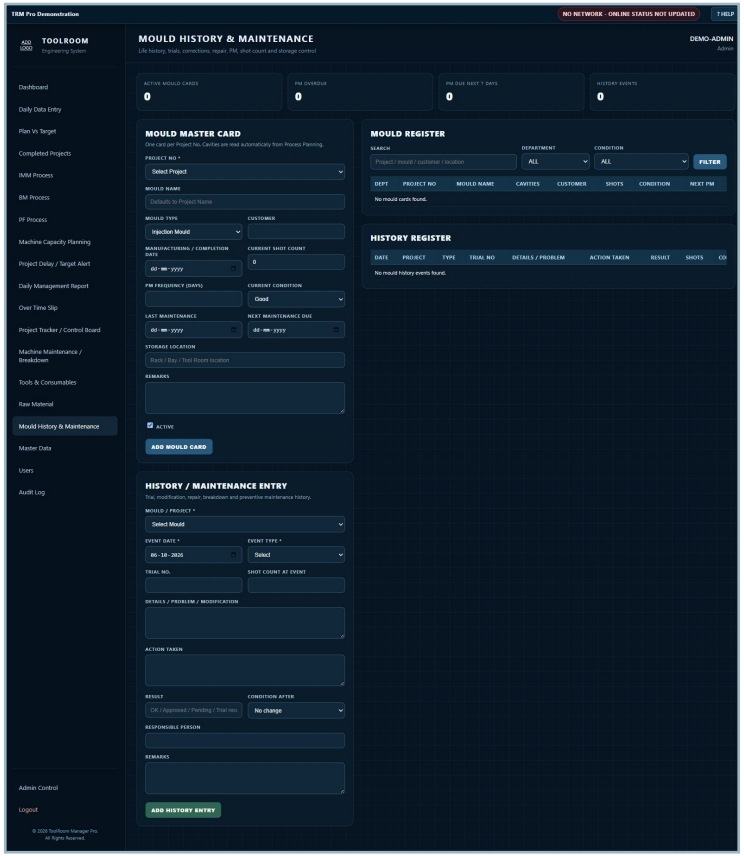
1. Select the relevant mould/project and enter the requested event details.
2. Record the maintenance/history date, work carried out and remarks.
3. Save, then review the saved history and authorized export actions.

Practical notes

Permissions are independent of Daily Data Entry. Store-only accounts should not gain mould entry rights simply because they can view material records.

29 Mould History & Maintenance

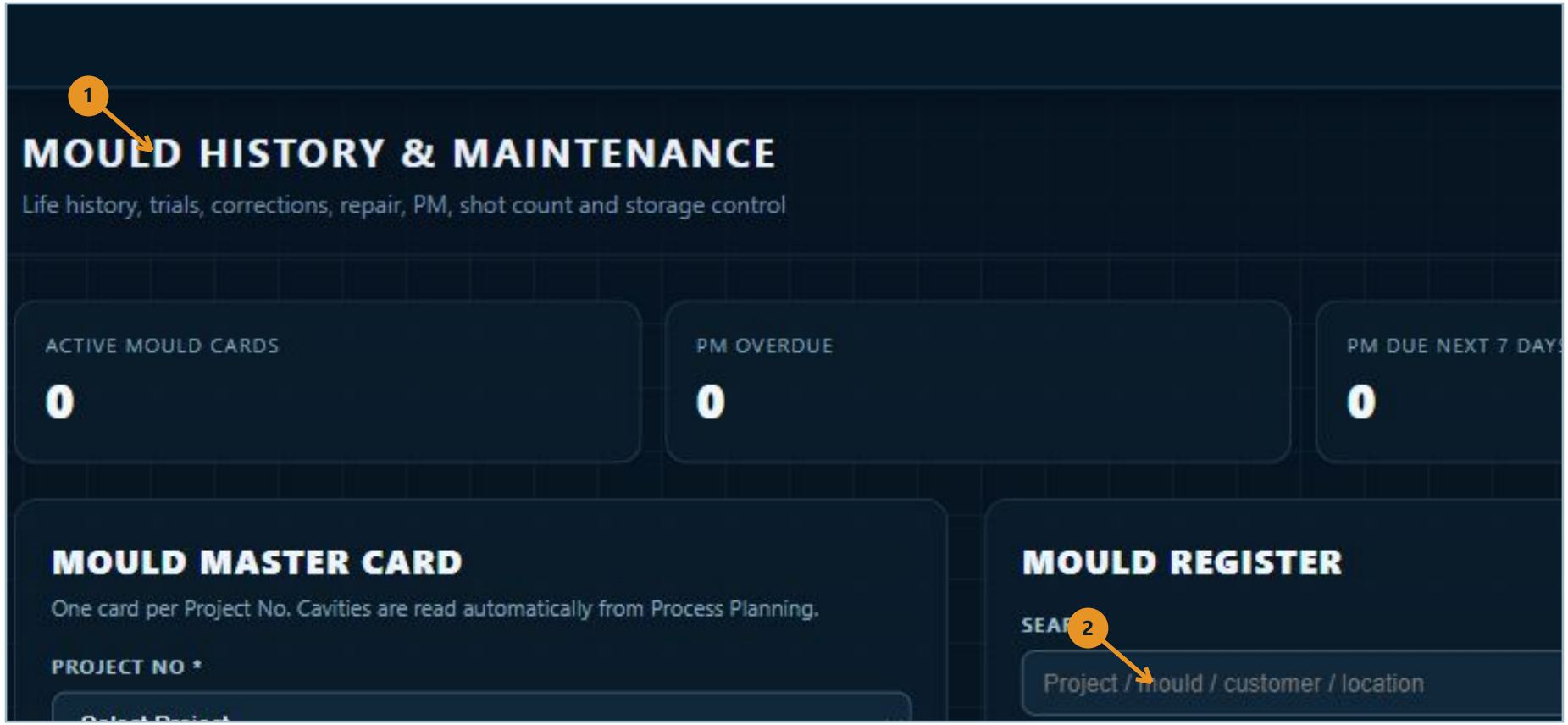
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 01 • orange numbers point to the named controls



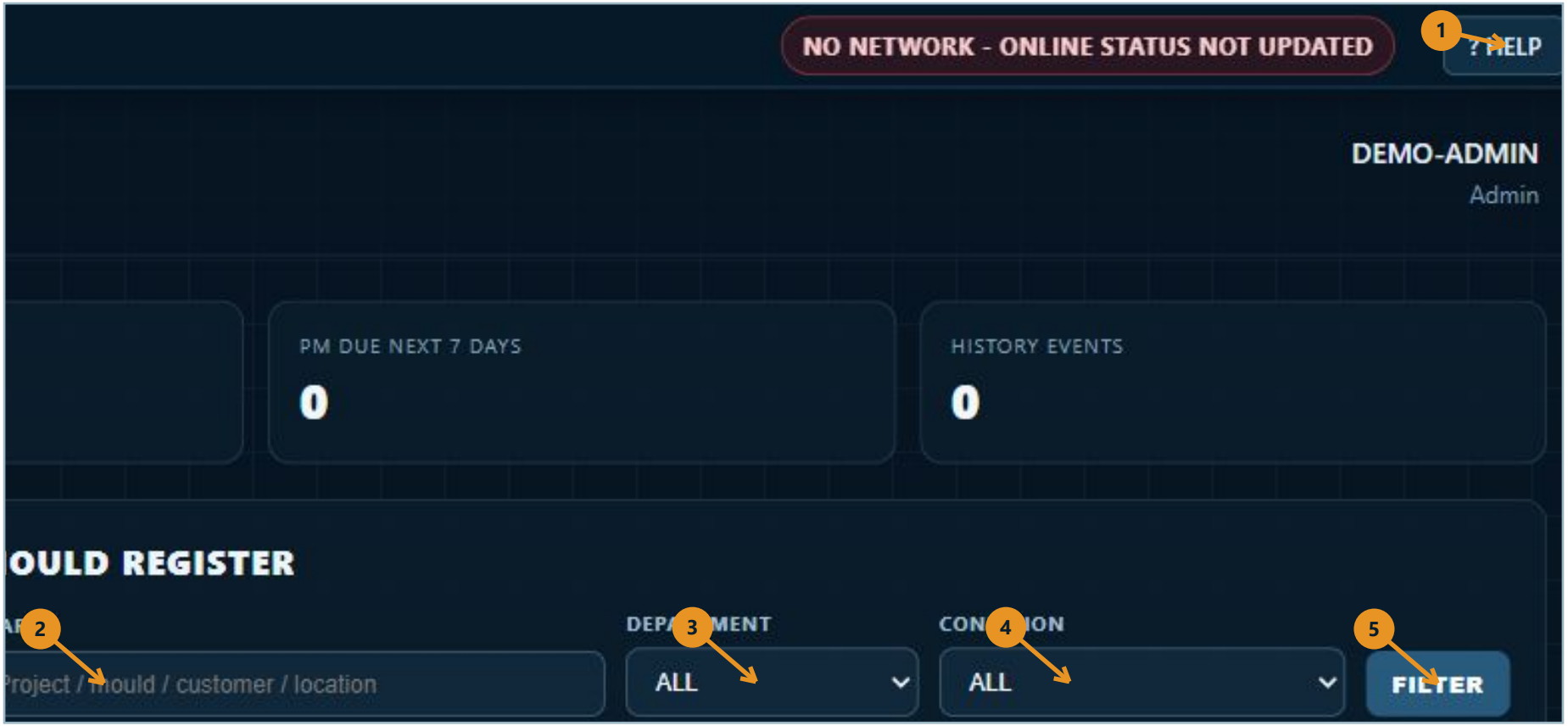
1. MOULD HISTORY & MAINTENANCE
Enter or review this value as labeled

2. SEARCH
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

2. SEARCH
Enter or review this value as labeled

3. Department
Choose the required value

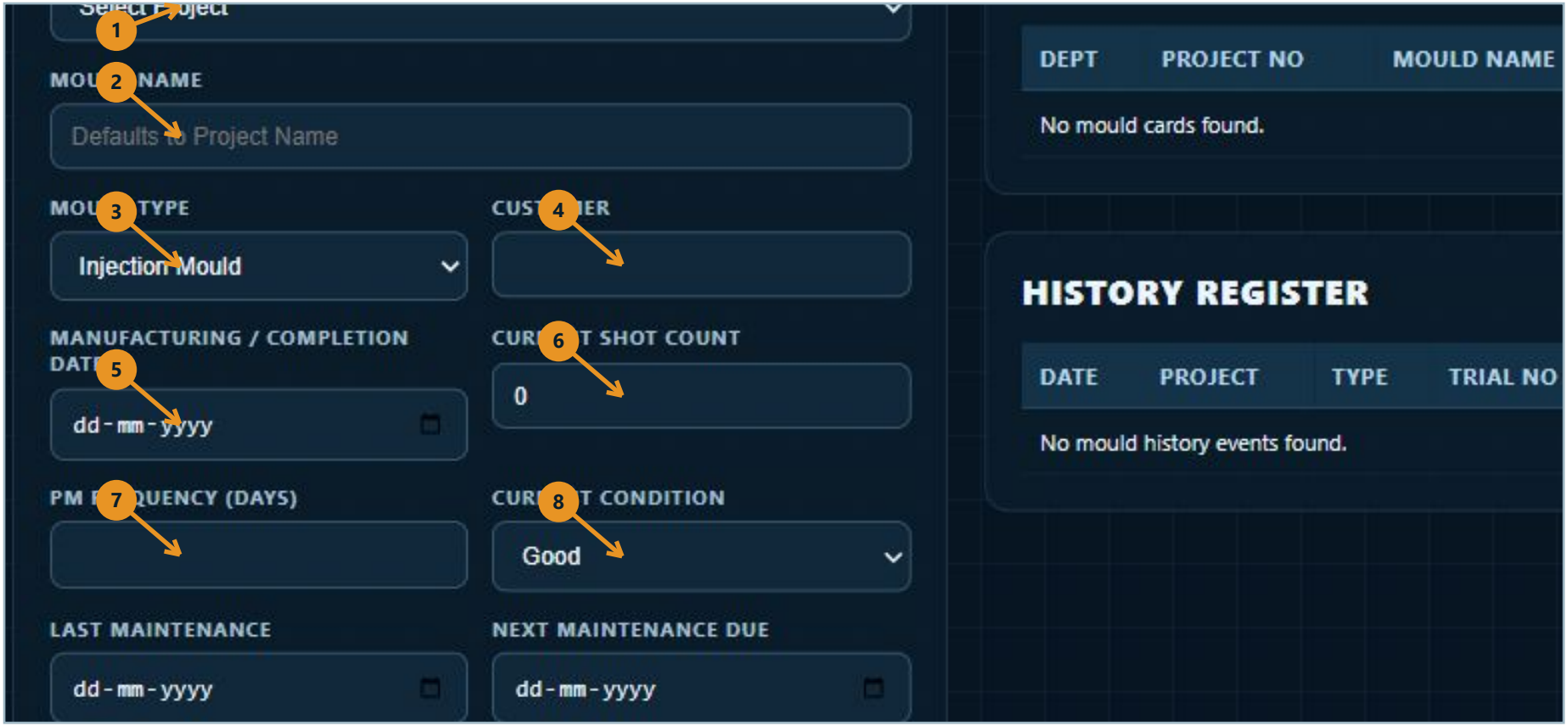
4. Condition
Choose the required value

5. FILTER
Apply the selected filters and refresh the displayed results

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 03 • orange numbers point to the named controls



1. Project
Choose the required value

2. MOULD NAME
Enter or review this value as labeled

3. Mould Type
Choose the required value

4. CUSTOMER
Enter or review this value as labeled

5. MANUFACTURING / COMPLETION DATE
Select the actual reference date/time for this record or report

6. CURRENT SHOT COUNT
Enter the numeric quantity/time required by the label

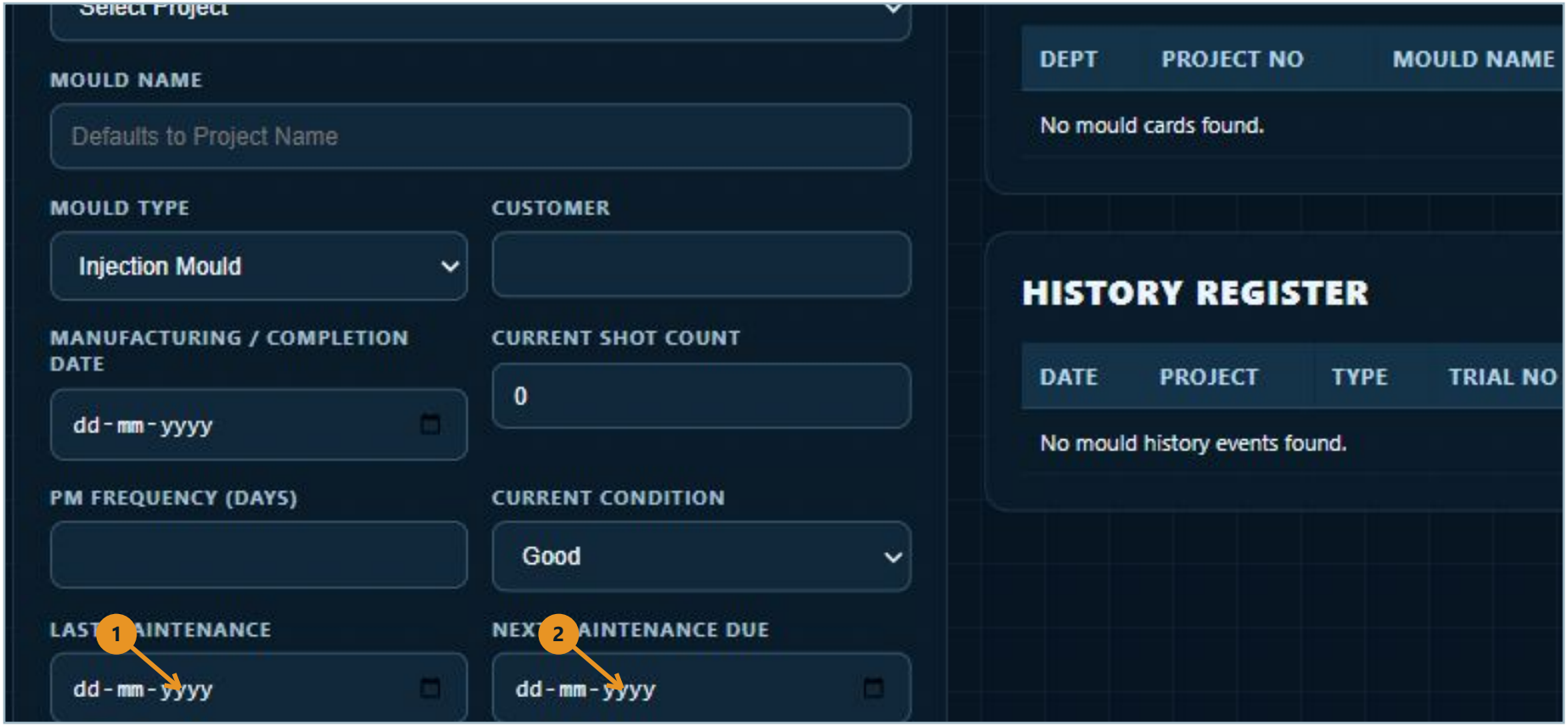
7. PM FREQUENCY (DAYS)
Enter the numeric quantity/time required by the label

8. Current Condition
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 04 • orange numbers point to the named controls



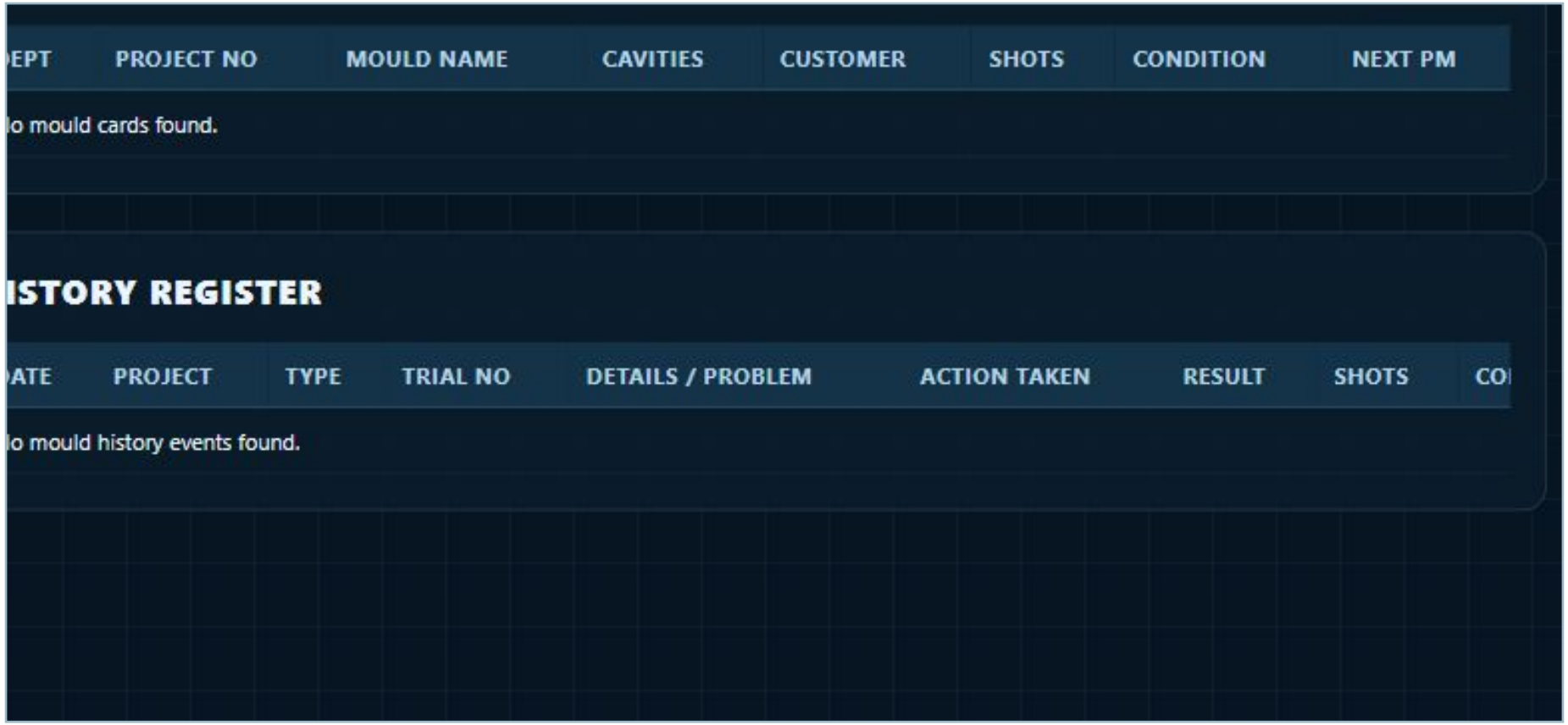
1. LAST MAINTENANCE
Select the actual reference date/time for this record or report

2. NEXT MAINTENANCE DUE
Select the actual reference date/time for this record or report

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

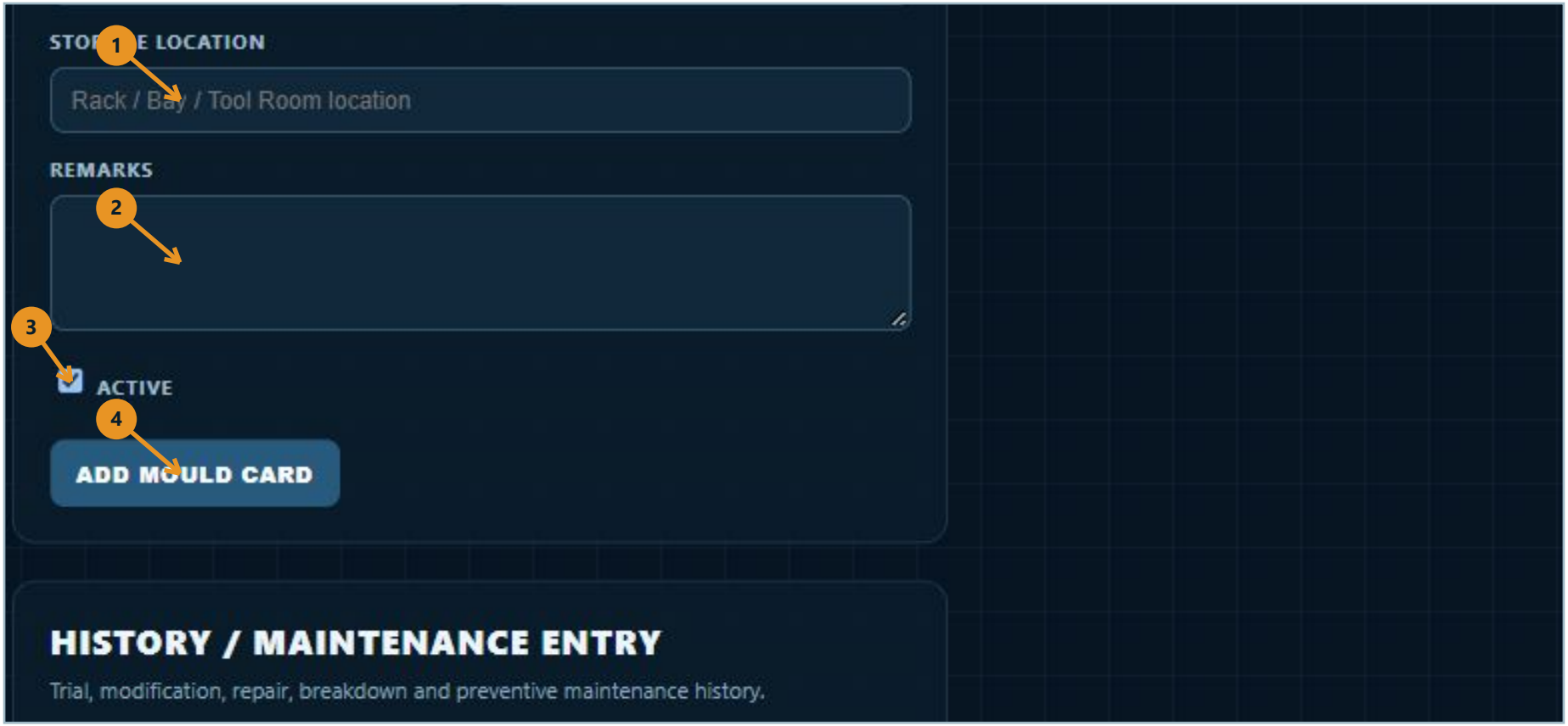
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 06 • orange numbers point to the named controls



1. STORAGE LOCATION
Enter or review this value as labeled

2. REMARKS
Record meaningful instructions or explanation

3. ACTIVE
Tick to enable this option; clear to disable it

4. ADD MOULD CARD
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 07 • orange numbers point to the named controls



1. Mould
Choose the required value

2. EVENT DATE *
Select the actual reference date/time for this record or report

3. Event Type
Choose the required value

4. TRIAL NO.
Enter or review this value as labeled

5. SHOT COUNT AT EVENT
Enter the numeric quantity/time required by the label

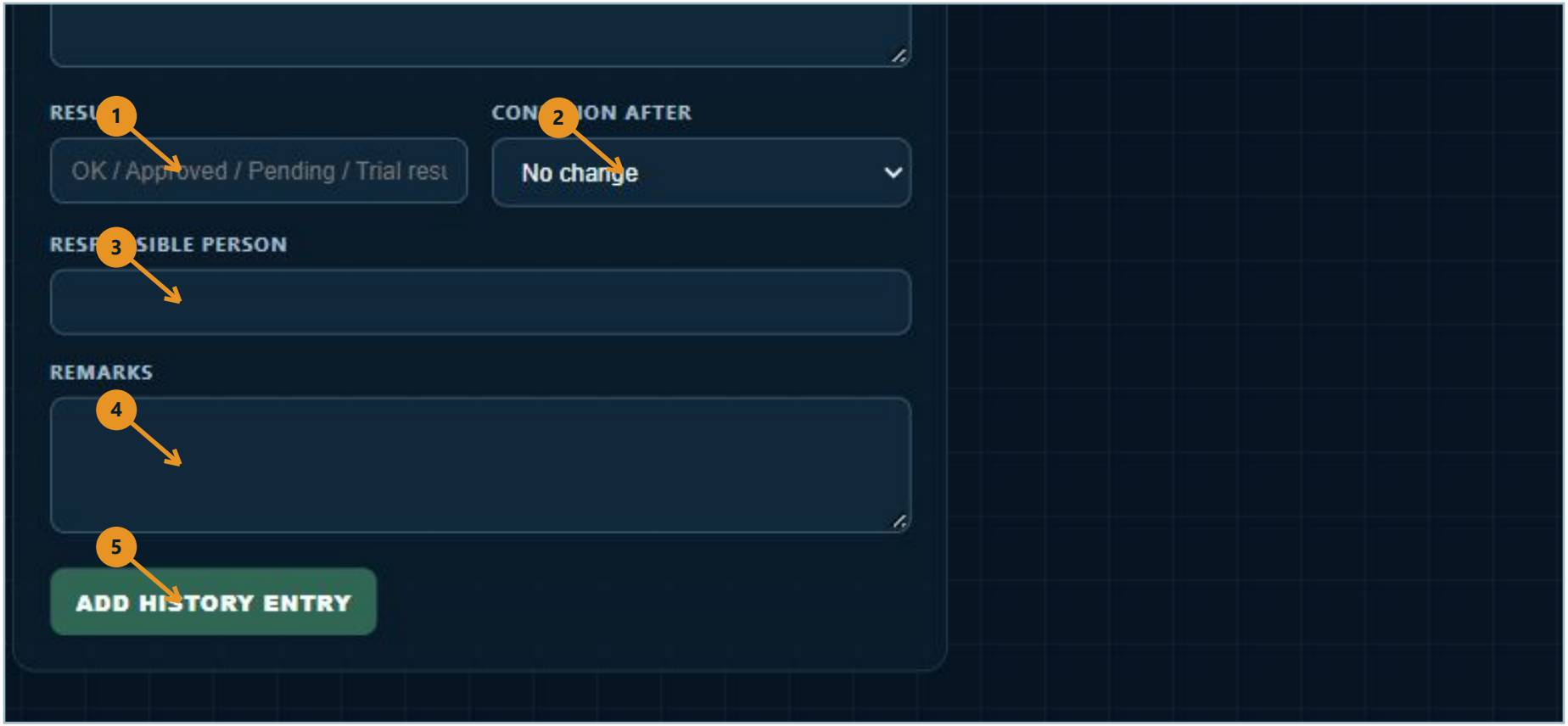
6. DETAILS / PROBLEM / MODIFICATION
Enter or review this value as labeled

7. ACTION TAKEN
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Illustrated detail 08 • orange numbers point to the named controls



1. RESULT
Enter or review this value as labeled

2. Condition After
Choose the required value

3. RESPONSIBLE PERSON
Enter or review this value as labeled

4. REMARKS
Record meaningful instructions or explanation

5. ADD HISTORY ENTRY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

29 Mould History & Maintenance

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
MOULD HISTORY & MAINTENANCE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Project	Choose the required value. Available choices: Select Project. The displayed records follow this screen’s scope and account access.
MOULD NAME	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Mould Type	Choose the required value. Available choices: Injection Mould; Die Casting Die; Fixture / Tool; Other. The displayed records follow this screen’s scope and account access.
CUSTOMER	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
MANUFACTURING / COMPLETION DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
CURRENT SHOT COUNT	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
PM FREQUENCY (DAYS)	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
Current Condition	Choose the required value. Available choices: Good; Under Maintenance; Repair Required; Hold; Scrapped. The displayed records follow this screen’s scope and account access.
LAST MAINTENANCE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
NEXT MAINTENANCE DUE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
STORAGE LOCATION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
REMARKS	Record meaningful instructions or explanation. Do not use remarks to replace the correct numeric fields.
ACTIVE	Tick to enable this option; clear to disable it. Review its meaning in the chapter workflow before saving.

29 Mould History & Maintenance

Control reference continued

ADD MOULD CARD	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Mould	Choose the required value. Available choices: Select Mould. The displayed records follow this screen's scope and account access.
EVENT DATE *	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
Event Type	Choose the required value. Available choices: Select; Trial; Modification / Correction; Repair; Preventive Maintenance; Breakdown / Failure; Shot Count Update; Other. The displayed records follow this screen's scope and account access.
TRIAL NO.	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
SHOT COUNT AT EVENT	Enter the numeric quantity/time required by the label. Use the displayed unit and verify calculated totals.
DETAILS / PROBLEM / MODIFICATION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
ACTION TAKEN	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
RESULT	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Condition After	Choose the required value. Available choices: No change; Good; Under Maintenance; Repair Required; Hold; Scrapped. The displayed records follow this screen's scope and account access.
RESPONSIBLE PERSON	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
ADD HISTORY ENTRY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
SEARCH	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL; IMM; BM; PF. The displayed records follow this screen's scope and account access.
Condition	Choose the required value. Available choices: ALL; Good; Under Maintenance; Repair Required; Hold; Scrapped. The displayed records follow this screen's scope and account access.

FILTER	Apply the selected filters and refresh the displayed results. Check the date/period and account scope.

30 Audit Log

Workflow • read before using the illustrated controls

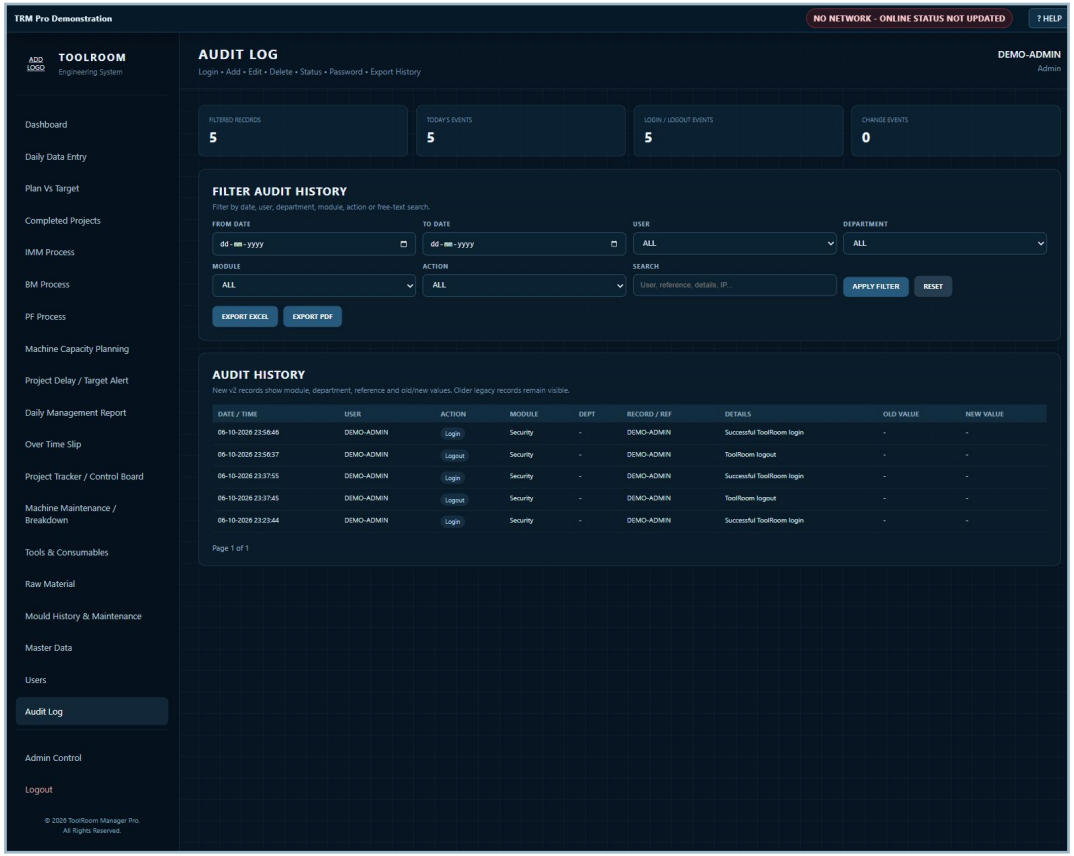
1. Filter the audit history by the available user/action/date fields.
2. Review who performed a change and when.
3. Use the authorized export action for an investigation or retained record.

Practical notes

Audit history complements backups. A user account identifies the actor; shared credentials reduce the value of that history. Resetting a password or changing permissions should remain traceable.

30 Audit Log

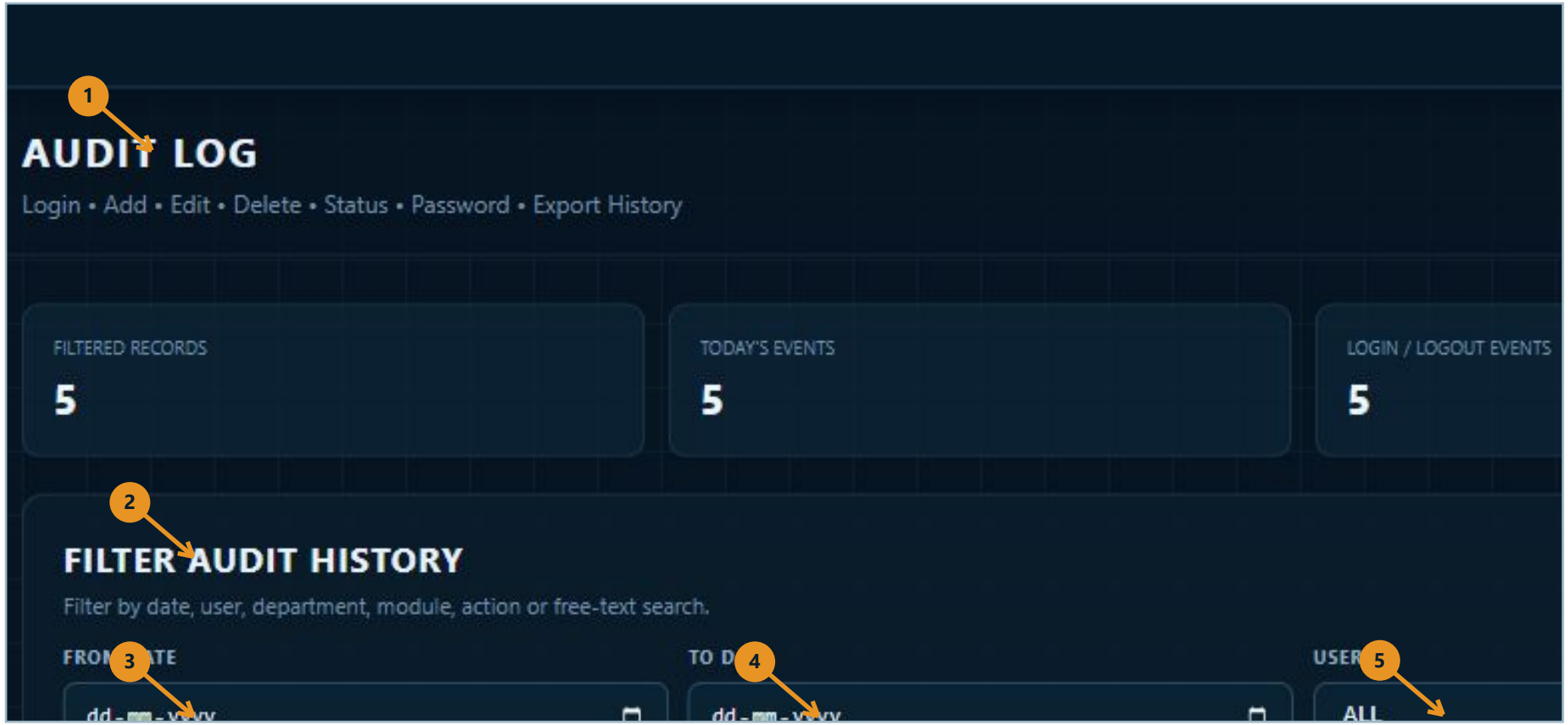
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Illustrated detail 01 • orange numbers point to the named controls



1. AUDIT LOG
Enter or review this value as labeled

2. FILTER AUDIT HISTORY
Enter or review this value as labeled

3. FROM DATE
Select the actual reference date/time for this record or report

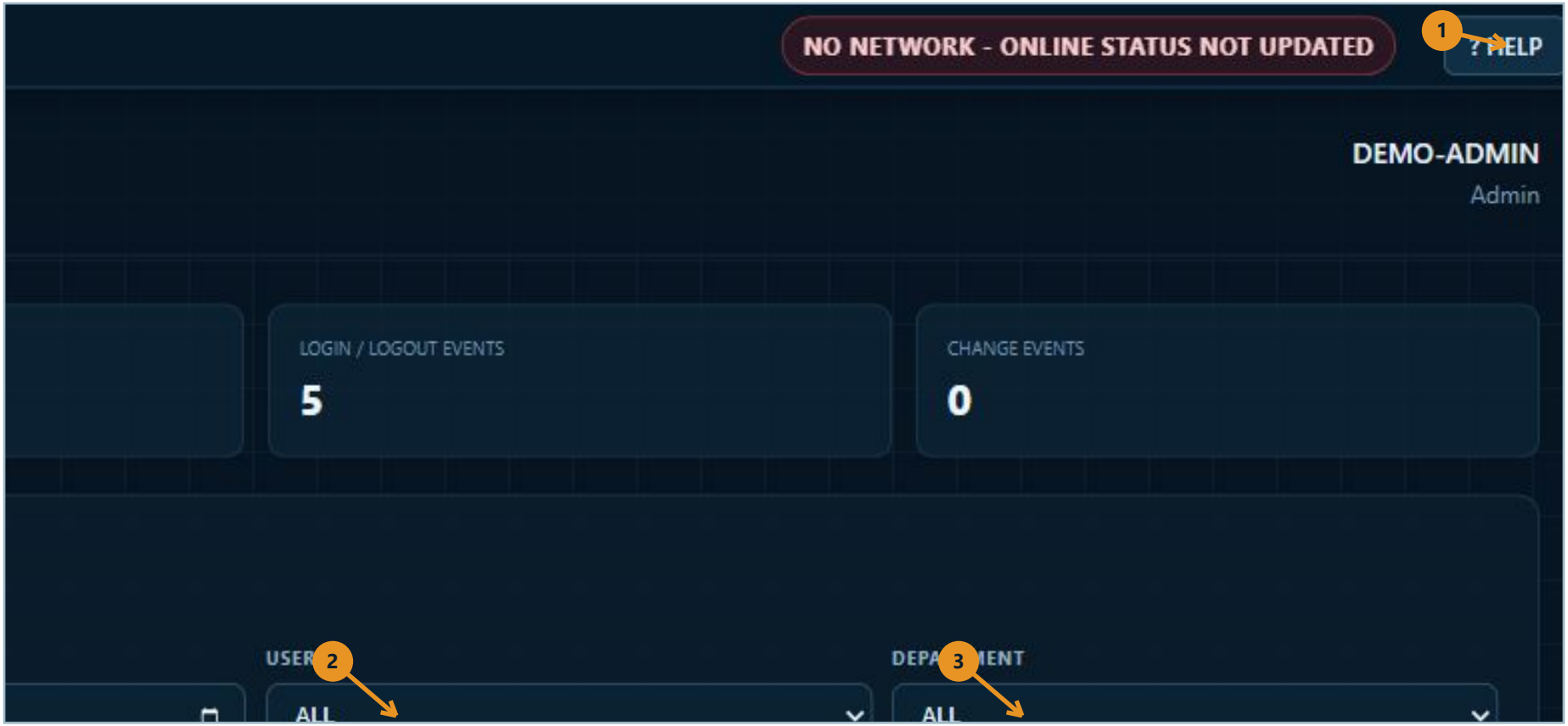
4. TO DATE
Select the actual reference date/time for this record or report

5. User
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Illustrated detail 02 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

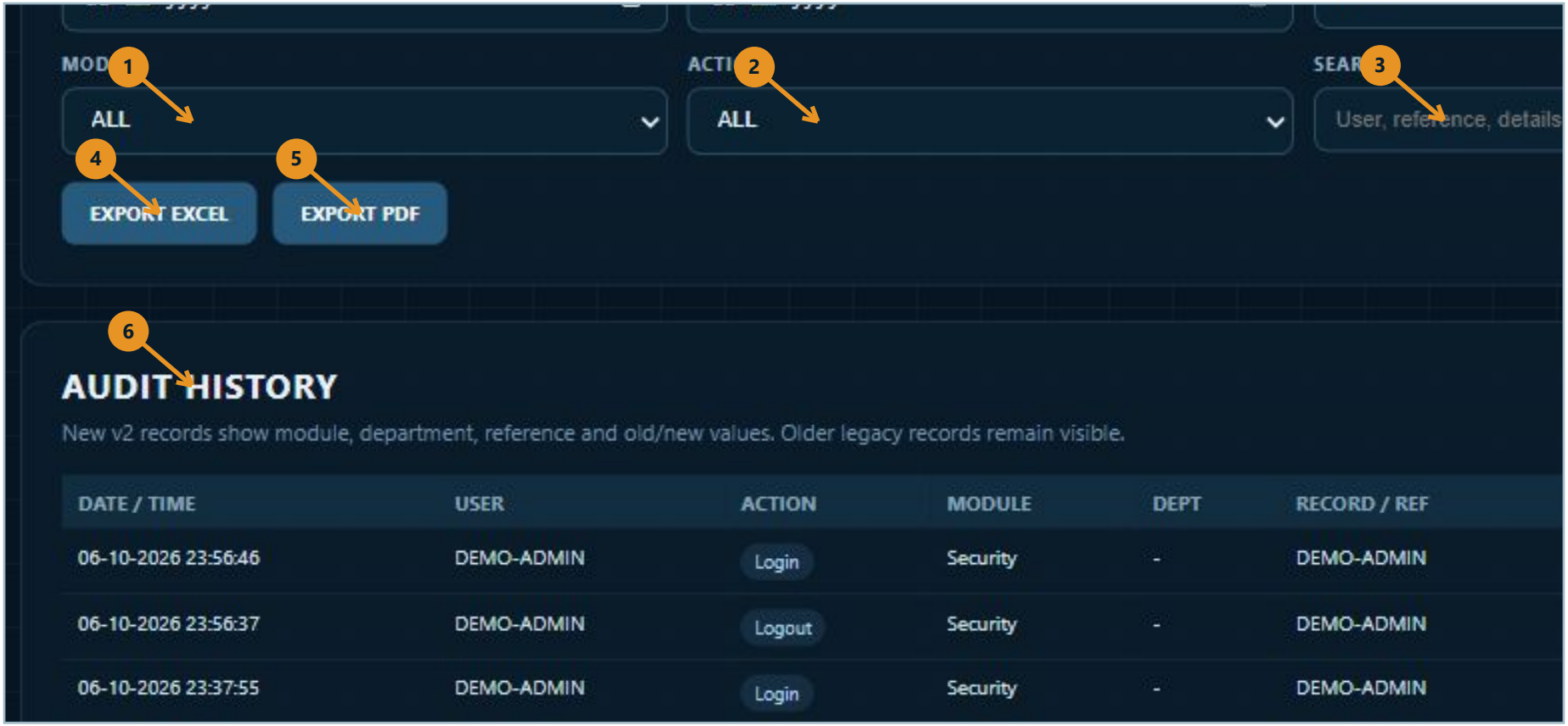
2. User
Choose the required value

3. Department
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Illustrated detail 03 • orange numbers point to the named controls



1. Module
Choose the required value

2. Action
Choose the required value

3. SEARCH
Enter or review this value as labeled

4. EXPORT EXCEL
Export the current report/stock scope in the indicated format

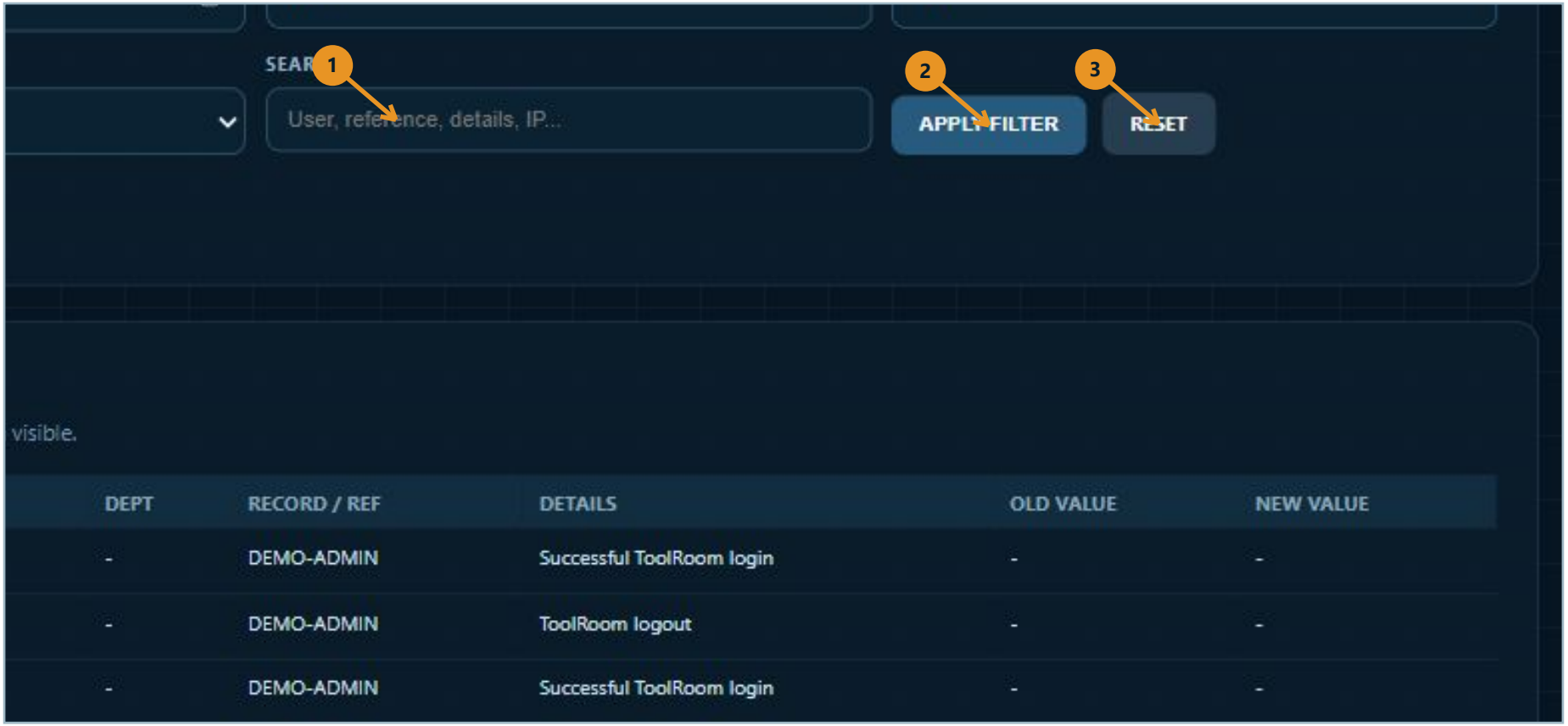
5. EXPORT PDF
Export the current report/stock scope in the indicated format

6. AUDIT HISTORY
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Illustrated detail 04 • orange numbers point to the named controls



1. SEARCH
Enter or review this value as labeled

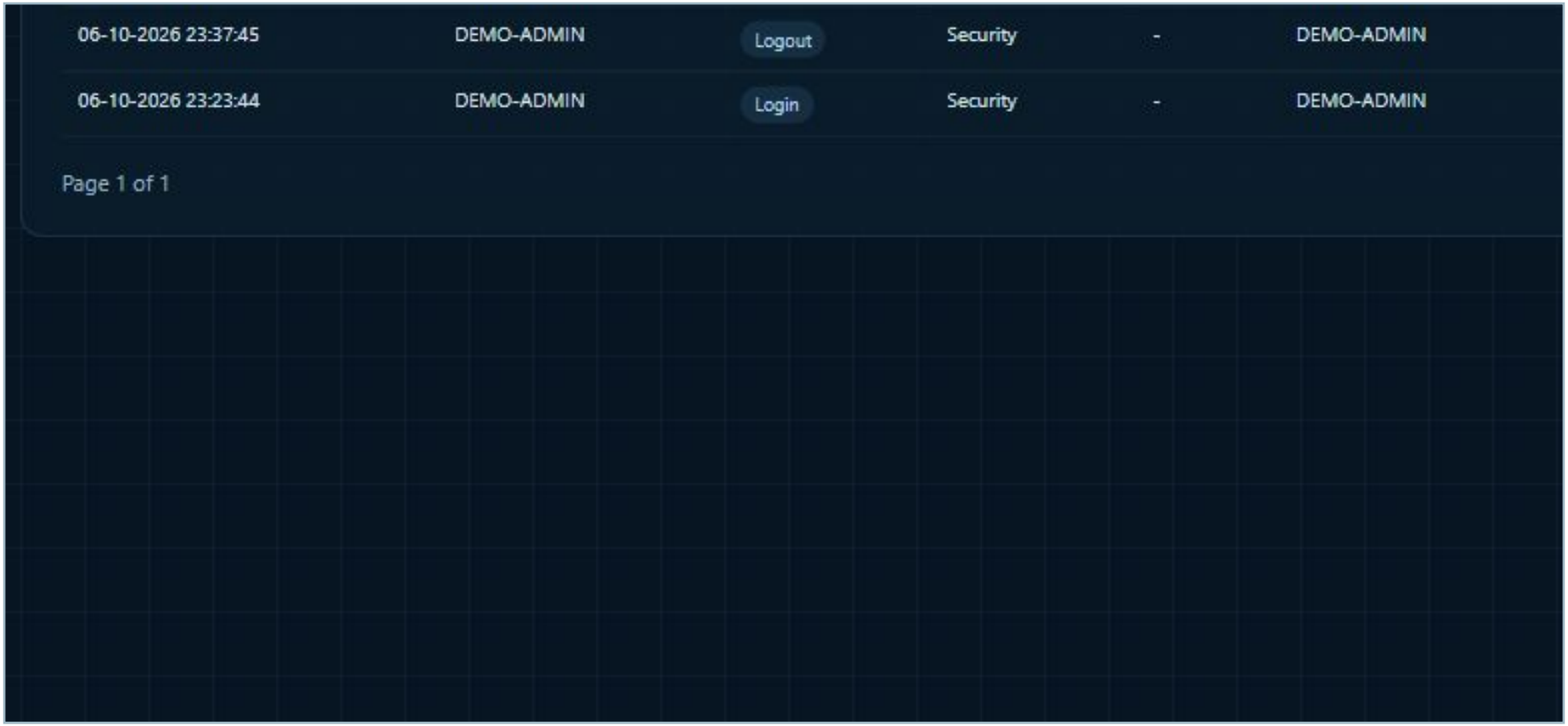
2. APPLY FILTER
Use this named action/tab for the workflow described in this chapter

3. RESET
Clear the current draft/checks or reset the filter as indicated

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

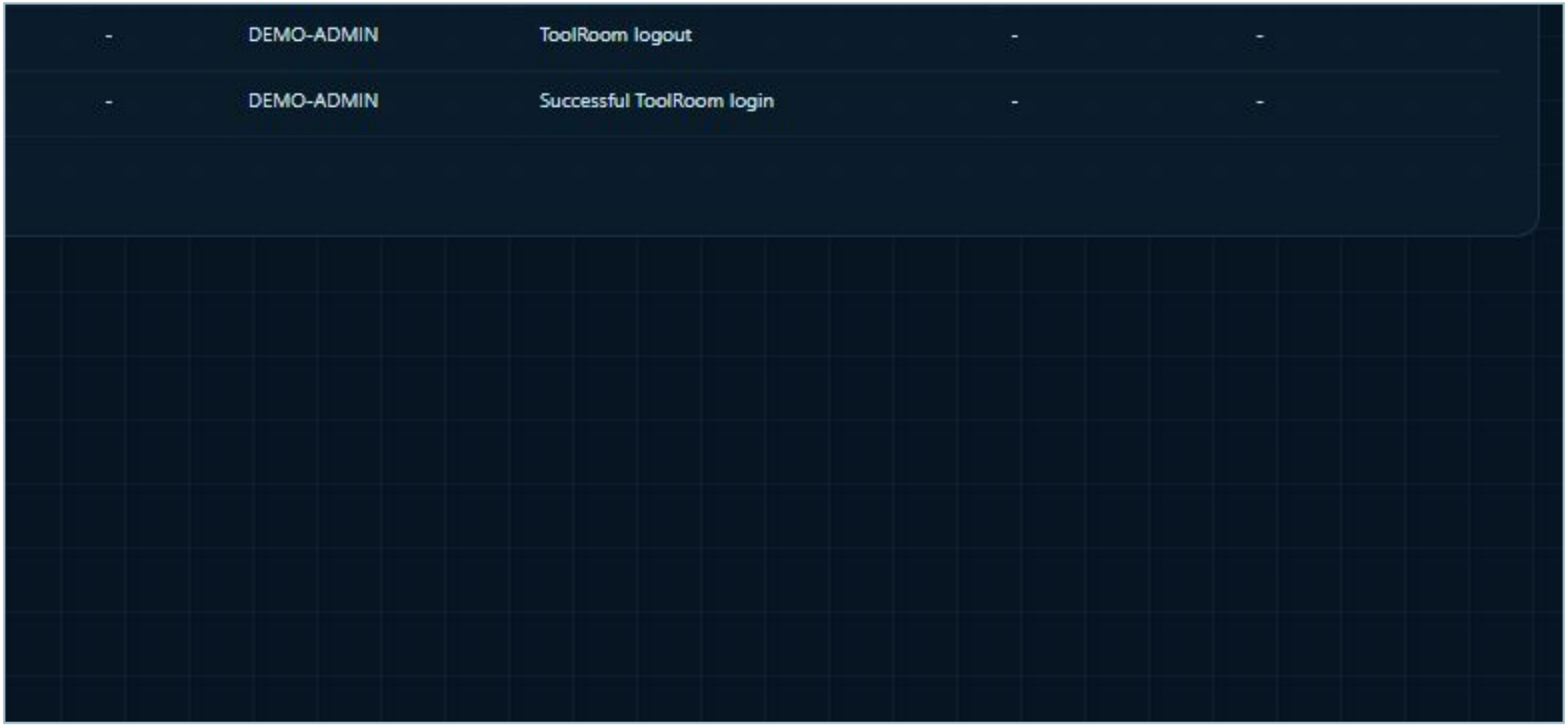
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

30 Audit Log

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
AUDIT LOG	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FILTER AUDIT HISTORY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FROM DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
TO DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
User	Choose the required value. Available choices: ALL. The displayed records follow this screen's scope and account access.
Department	Choose the required value. Available choices: ALL; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Module	Choose the required value. Available choices: ALL; Security. The displayed records follow this screen's scope and account access.
Action	Choose the required value. Available choices: ALL; Login; Logout. The displayed records follow this screen's scope and account access.
SEARCH	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
APPLY FILTER	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
RESET	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
EXPORT EXCEL	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
EXPORT PDF	Export the current report/stock scope in the indicated format. Export permission must be granted for the account.
AUDIT HISTORY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

31 Operation files: attach and open

Workflow • read before using the illustrated controls

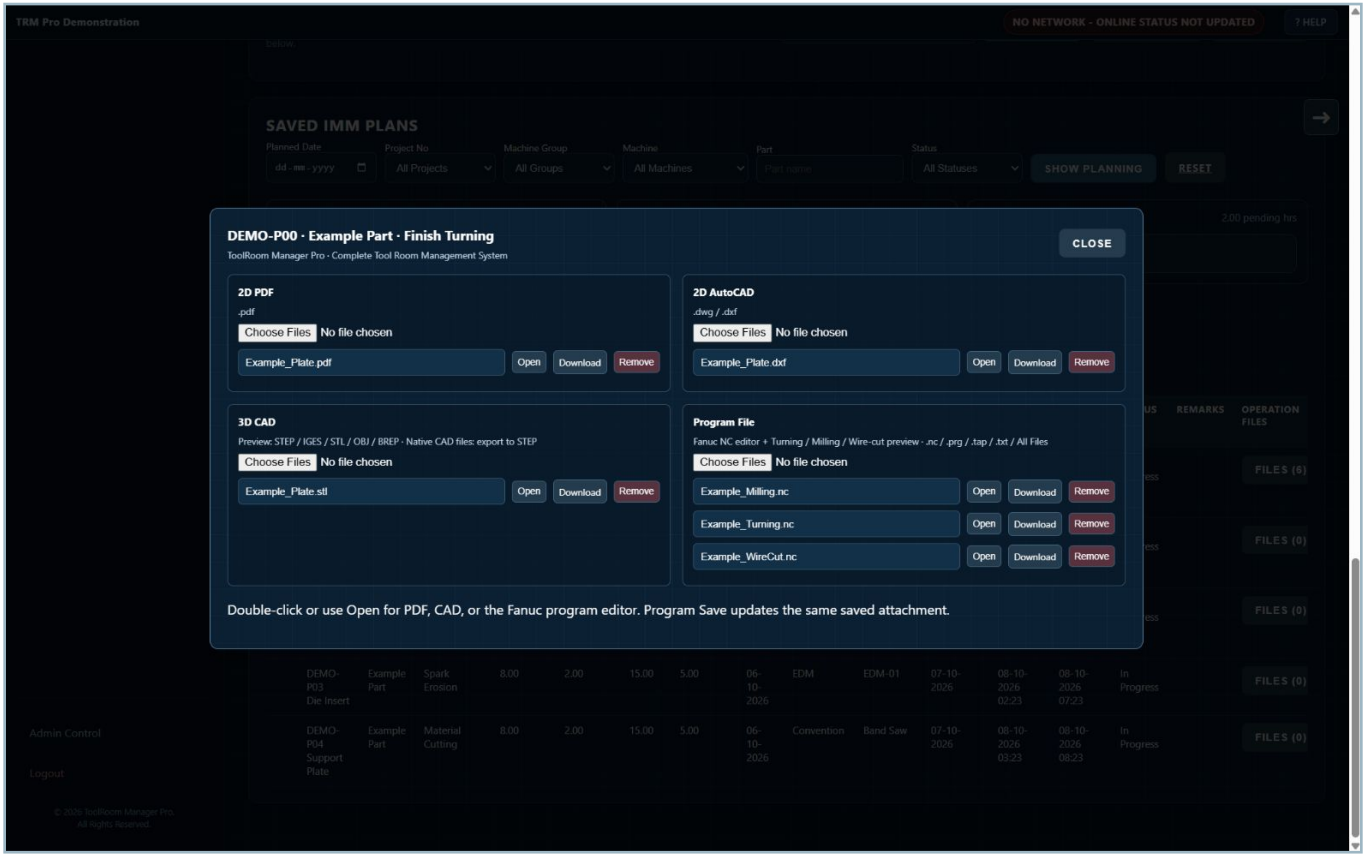
1. In a saved process plan choose FILES for the operation.
2. Use Add 2D PDF, Add 2D AutoCAD, Add 3D CAD or Add Program File to attach the correct file type.
3. Double-click the filename or use Open to view it. Download saves a copy; Remove deletes the attachment only when authorized.
4. Program Save updates the same saved attachment. Close the viewer to return to the file list and then the plan.

Practical notes

Attach files to the intended operation. Native CAD formats may require export to a supported interchange format. DWG conversion requires a configured ODA File Converter; the application does not make every proprietary CAD format directly viewable.

31 Operation files: attach and open

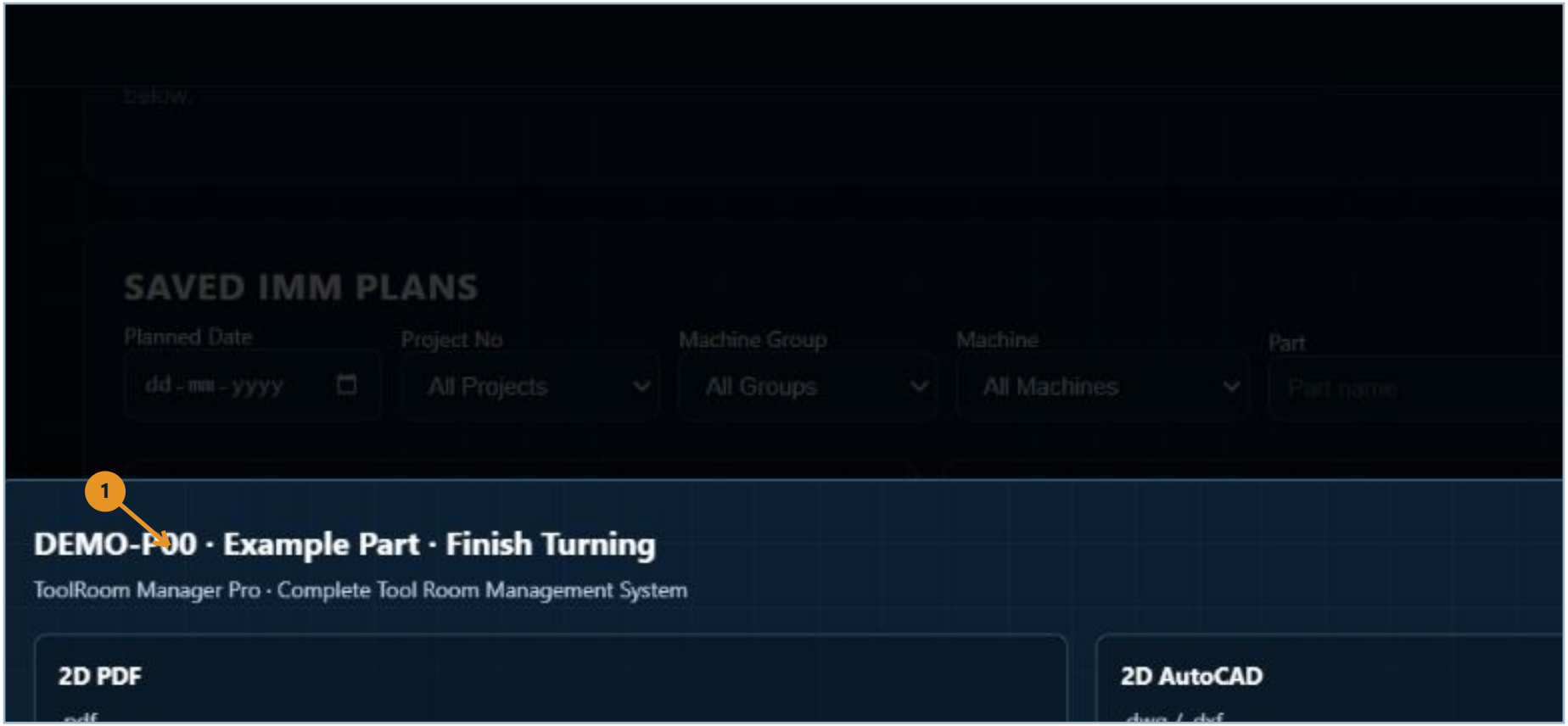
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 01 • orange numbers point to the named controls

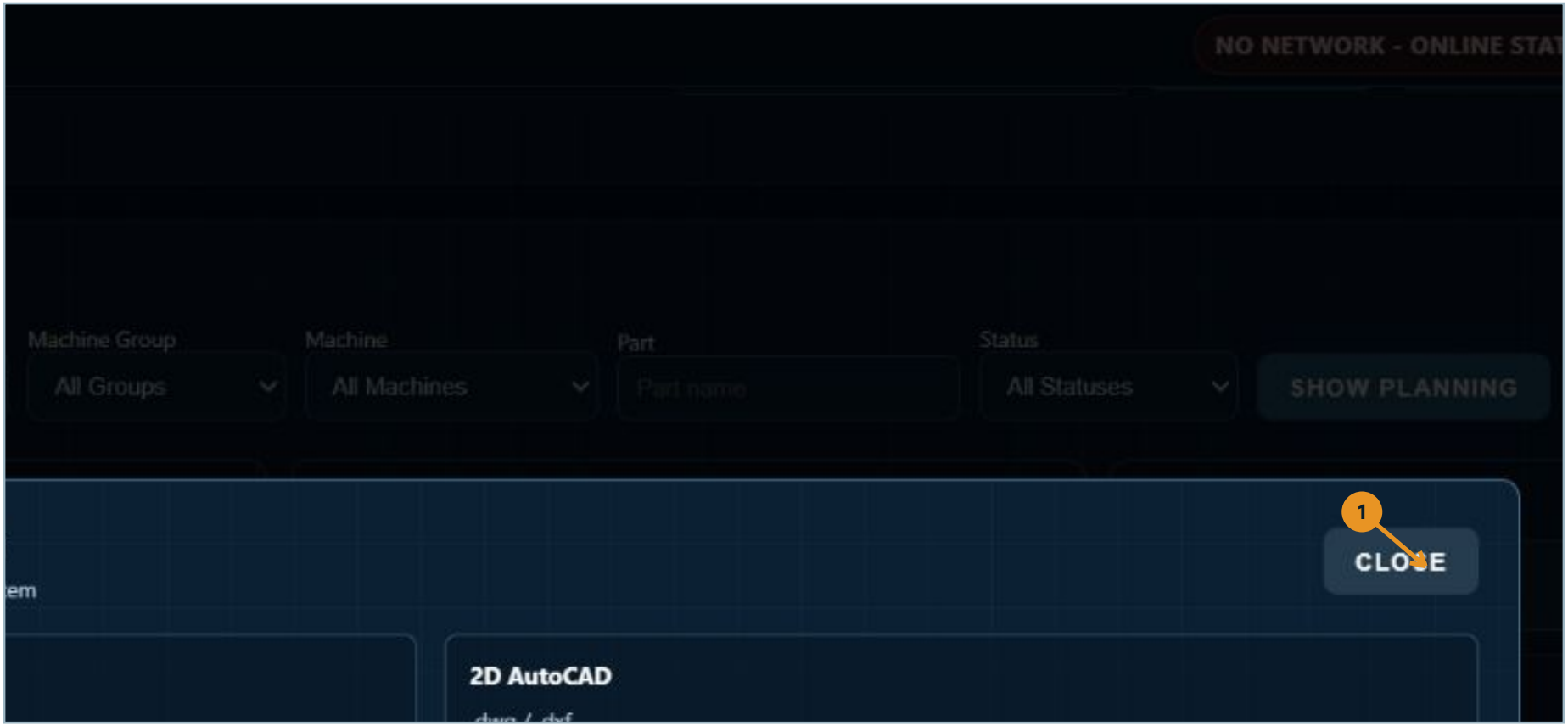


1. DEMO-P00 · Example Part · Finish Turning
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 02 • orange numbers point to the named controls

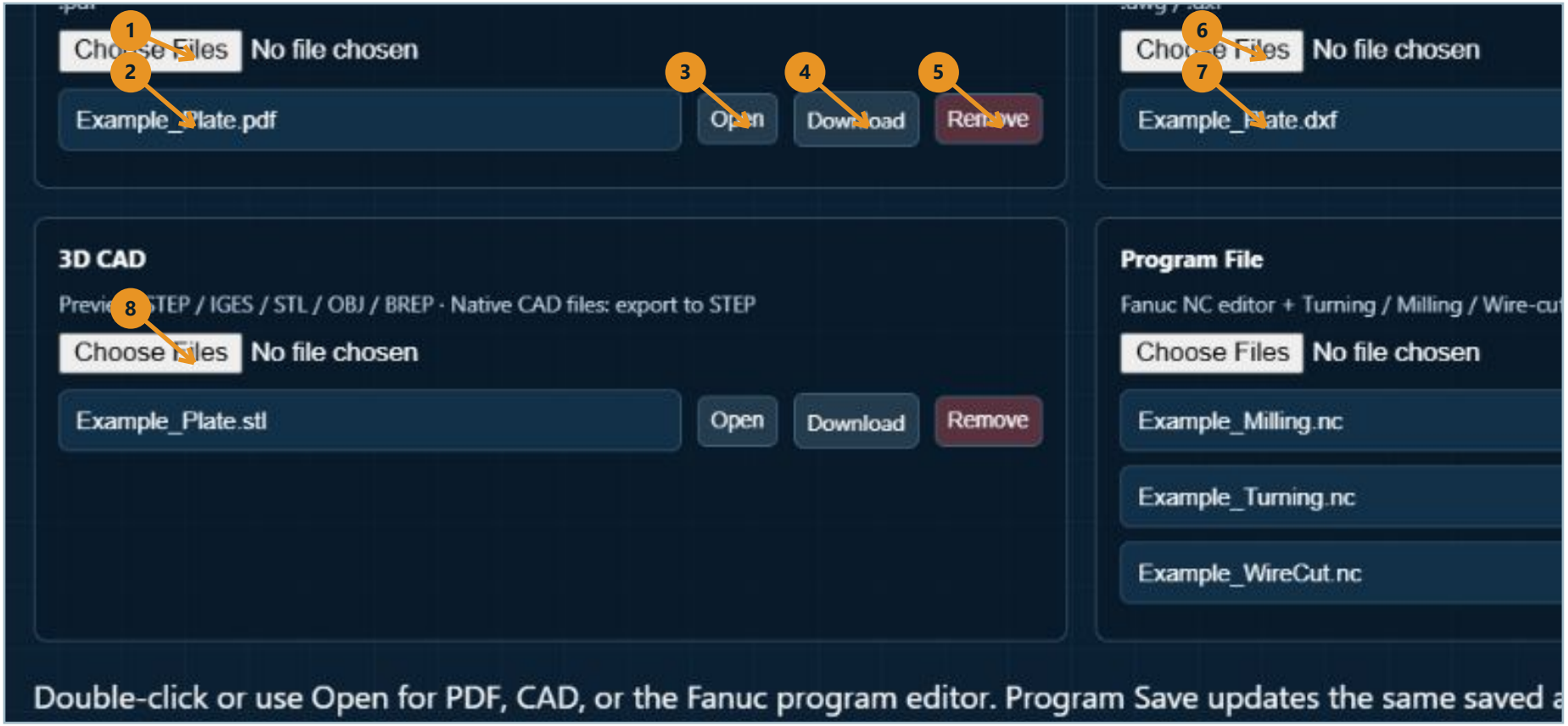


1. CLOSE
Close this viewer/dialog and return to the underlying application screen.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 03 • orange numbers point to the named controls



1. Add 2D PDF
Choose the appropriate file from this PC, then use the corresponding upload/add action.

2. Example_Plate.pdf
Use this named action/tab for the workflow described in this chapter

3. Open
Use this named action/tab for the workflow described in this chapter

4. Download
Save a separate copy of the file

5. Remove
Remove the selected record/attachment only with authorization

6. Add 2D AutoCAD
Choose the appropriate file from this PC, then use the corresponding upload/add action.

7. Example_Plate.dxf
Use this named action/tab for the workflow described in this chapter

8. Add 3D CAD
Choose the appropriate file from this PC, then use the corresponding upload/add action.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 04 • orange numbers point to the named controls



1. Example_Plate.stl
Use this named action/tab for the workflow described in this chapter

2. Open
Use this named action/tab for the workflow described in this chapter

3. Download
Save a separate copy of the file

4. Remove
Remove the selected record/attachment only with authorization

5. Add Program File
Choose the appropriate file from this PC, then use the corresponding upload/add action.

6. Example_Milling.nc
Use this named action/tab for the workflow described in this chapter

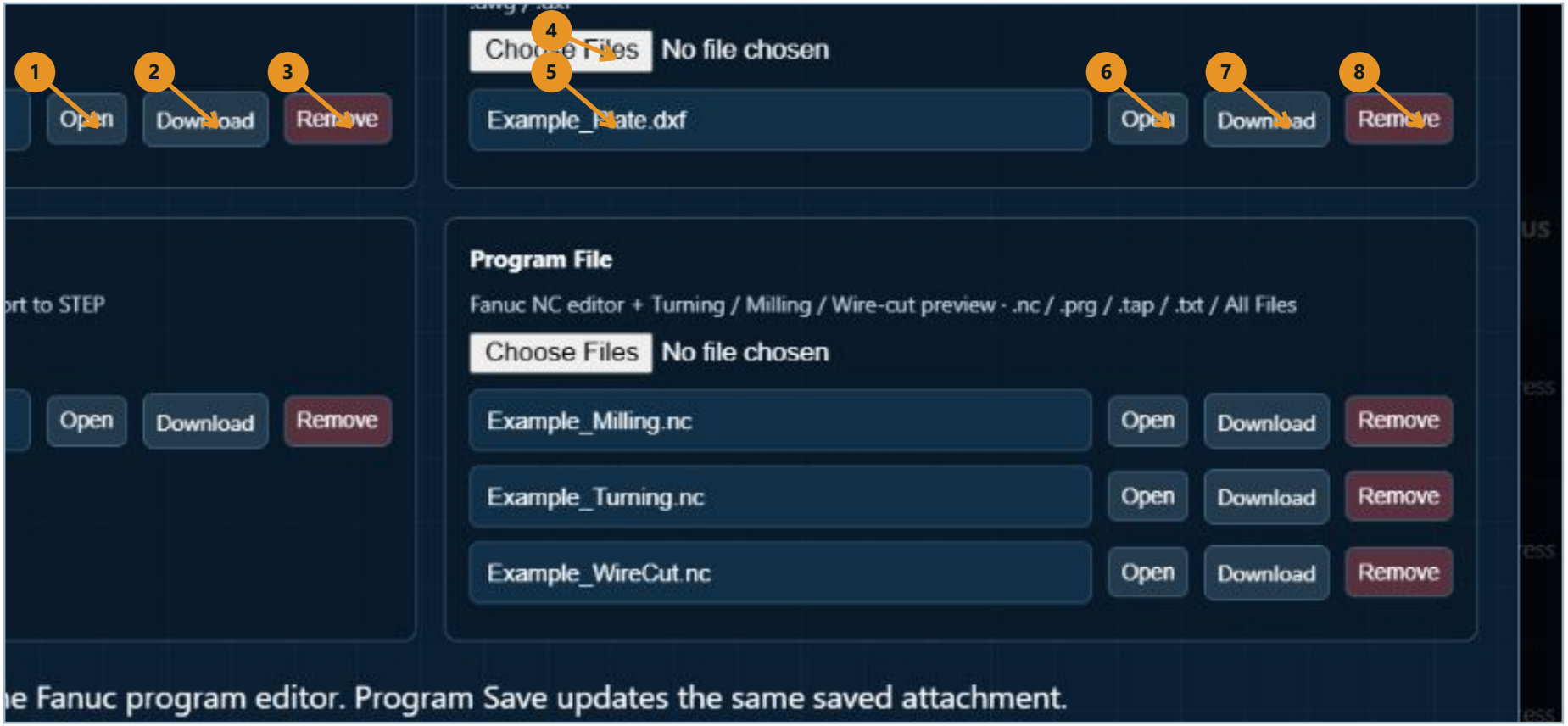
7. Example_Turning.nc
Use this named action/tab for the workflow described in this chapter

8. Example_WireCut.nc
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 05 • orange numbers point to the named controls



1. Open
Use this named action/tab for the workflow described in this chapter

2. Download
Save a separate copy of the file

3. Remove
Remove the selected record/attachment only with authorization

4. Add 2D AutoCAD
Choose the appropriate file from this PC, then use the corresponding upload/add action.

5. Example_Plate.dxf
Use this named action/tab for the workflow described in this chapter

6. Open
Use this named action/tab for the workflow described in this chapter

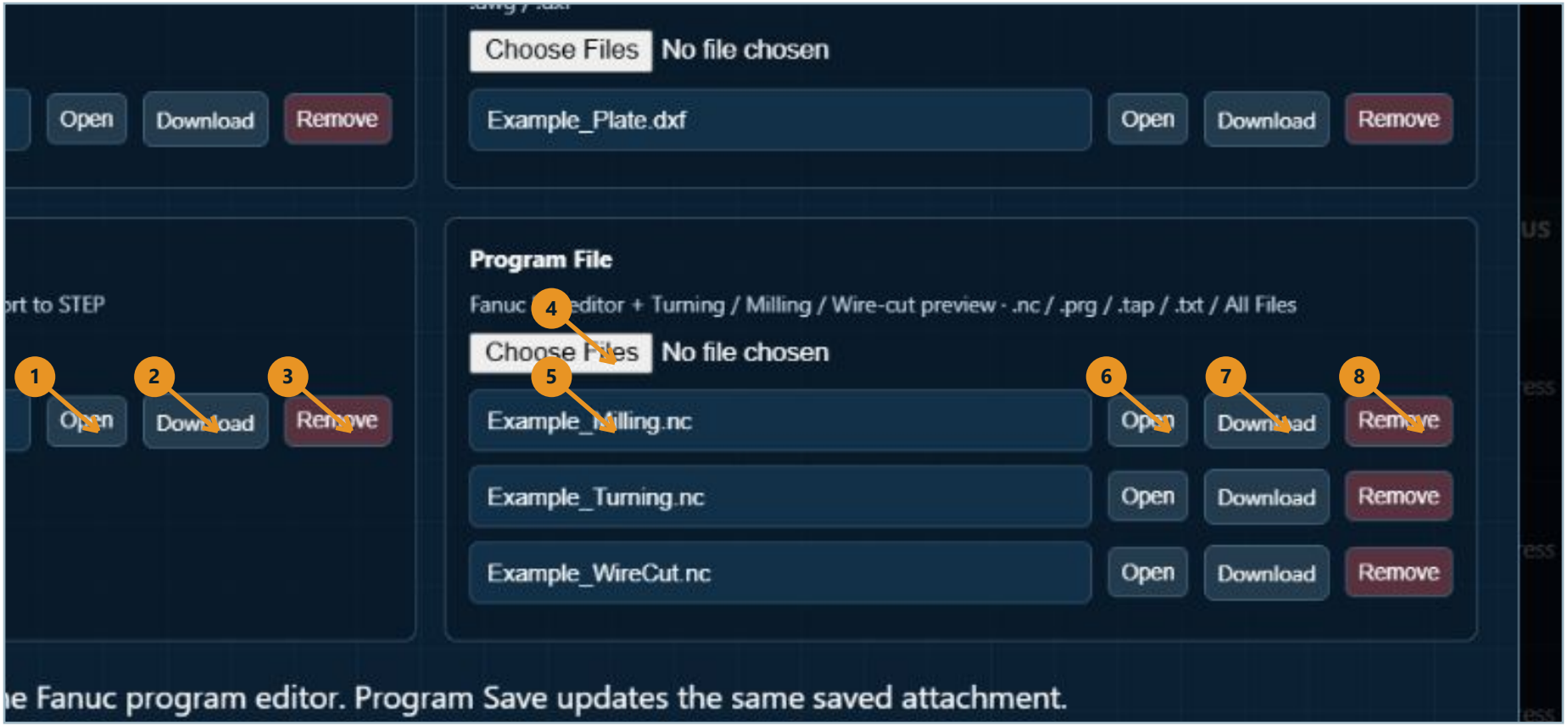
7. Download
Save a separate copy of the file

8. Remove
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 06 • orange numbers point to the named controls



1. Open
Use this named action/tab for the workflow described in this chapter

2. Download
Save a separate copy of the file

3. Remove
Remove the selected record/attachment only with authorization

4. Add Program File
Choose the appropriate file from this PC, then use the corresponding upload/add action.

5. Example_Milling.nc
Use this named action/tab for the workflow described in this chapter

6. Open
Use this named action/tab for the workflow described in this chapter

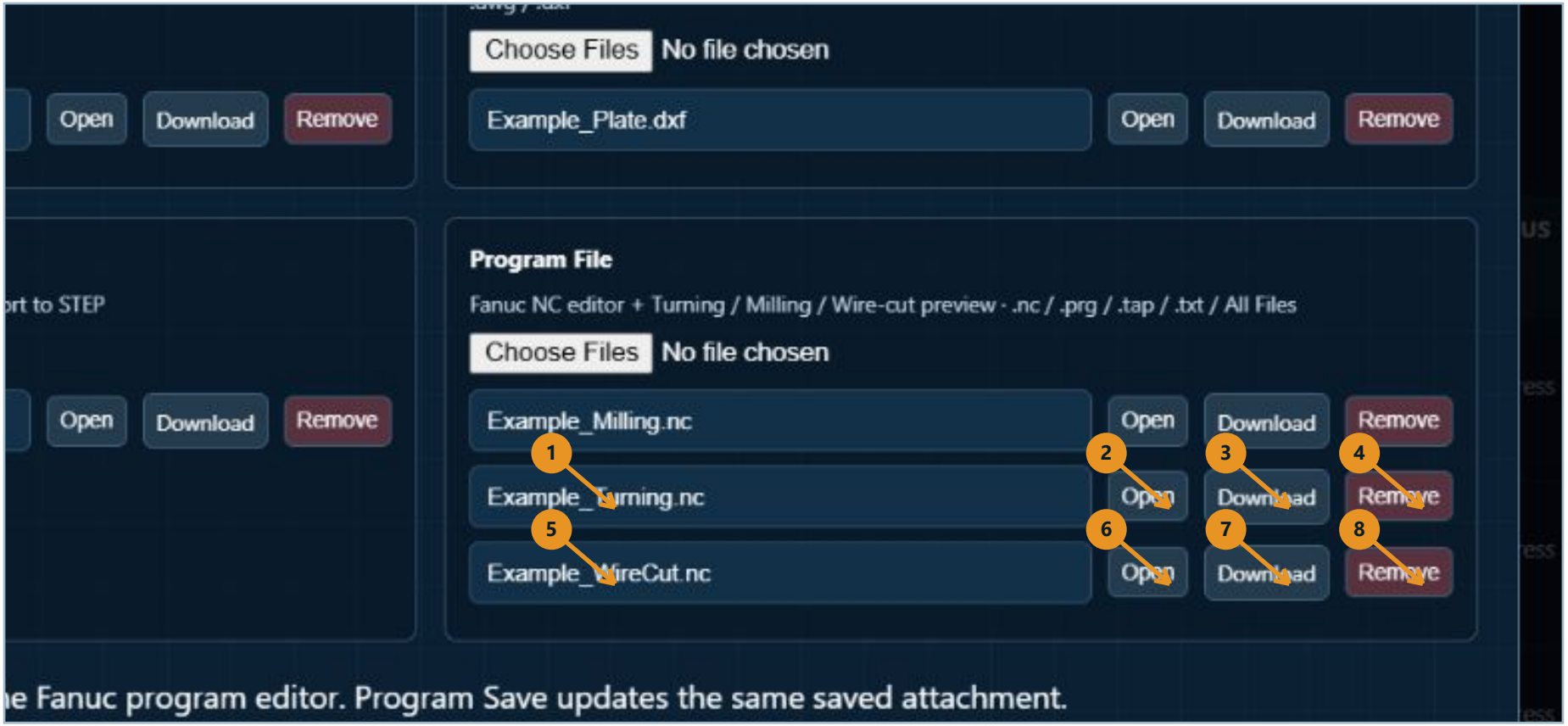
7. Download
Save a separate copy of the file

8. Remove
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

31 Operation files: attach and open

Illustrated detail 07 • orange numbers point to the named controls



1. Example_Turning.nc
Use this named action/tab for the workflow described in this chapter

2. Open
Use this named action/tab for the workflow described in this chapter

3. Download
Save a separate copy of the file

4. Remove
Remove the selected record/attachment only with authorization

5. Example_WireCut.nc
Use this named action/tab for the workflow described in this chapter

6. Open
Use this named action/tab for the workflow described in this chapter

7. Download
Save a separate copy of the file

8. Remove
Remove the selected record/attachment only with authorization

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

CLOSE	Close this viewer/dialog and return to the underlying application screen.
Add 2D PDF	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Example_Plate.pdf	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Open	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Download	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
Remove	Remove the selected record/attachment only with authorization. Review the target and keep the required backup before committing.
Add 2D AutoCAD	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Example_Plate.dxf	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Add 3D CAD	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Example_Plate.stl	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Add Program File	Choose the appropriate file from this PC, then use the corresponding upload/add action.
Example_Milling.nc	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Example_Turning.nc	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Example_WireCut.nc	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

32 PDF drawing viewer

Workflow • read before using the illustrated controls

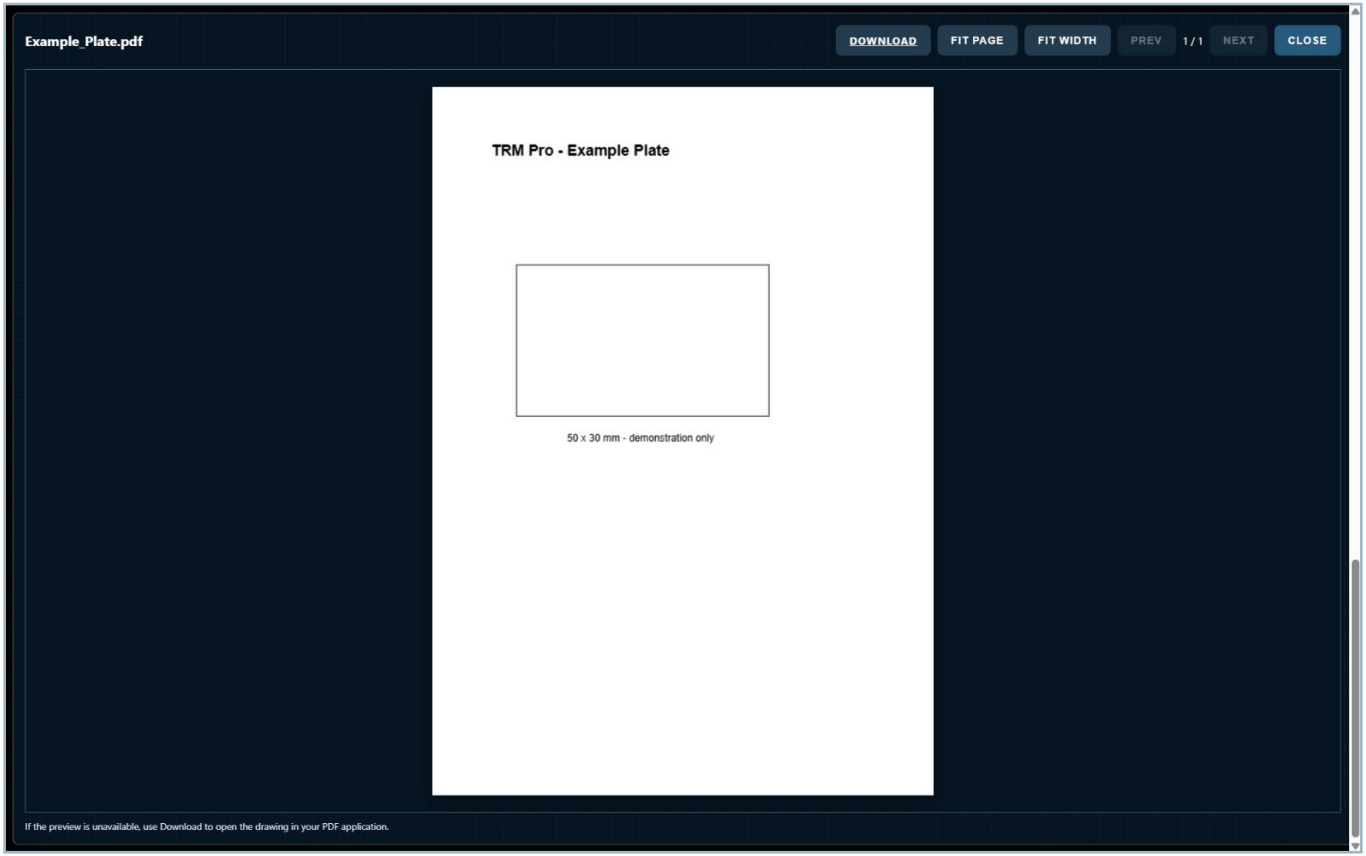
1. Open the operation PDF and use the viewer page/zoom controls.
2. Use the drawing/check controls available in the viewer and follow its status guidance.
3. Download when a separate document copy is required, or CLOSE to return to the plan.

Practical notes

A rendered PDF drawing does not automatically carry an engineering model scale. Treat visual measurements according to the viewer unit/scale instructions.

32 PDF drawing viewer

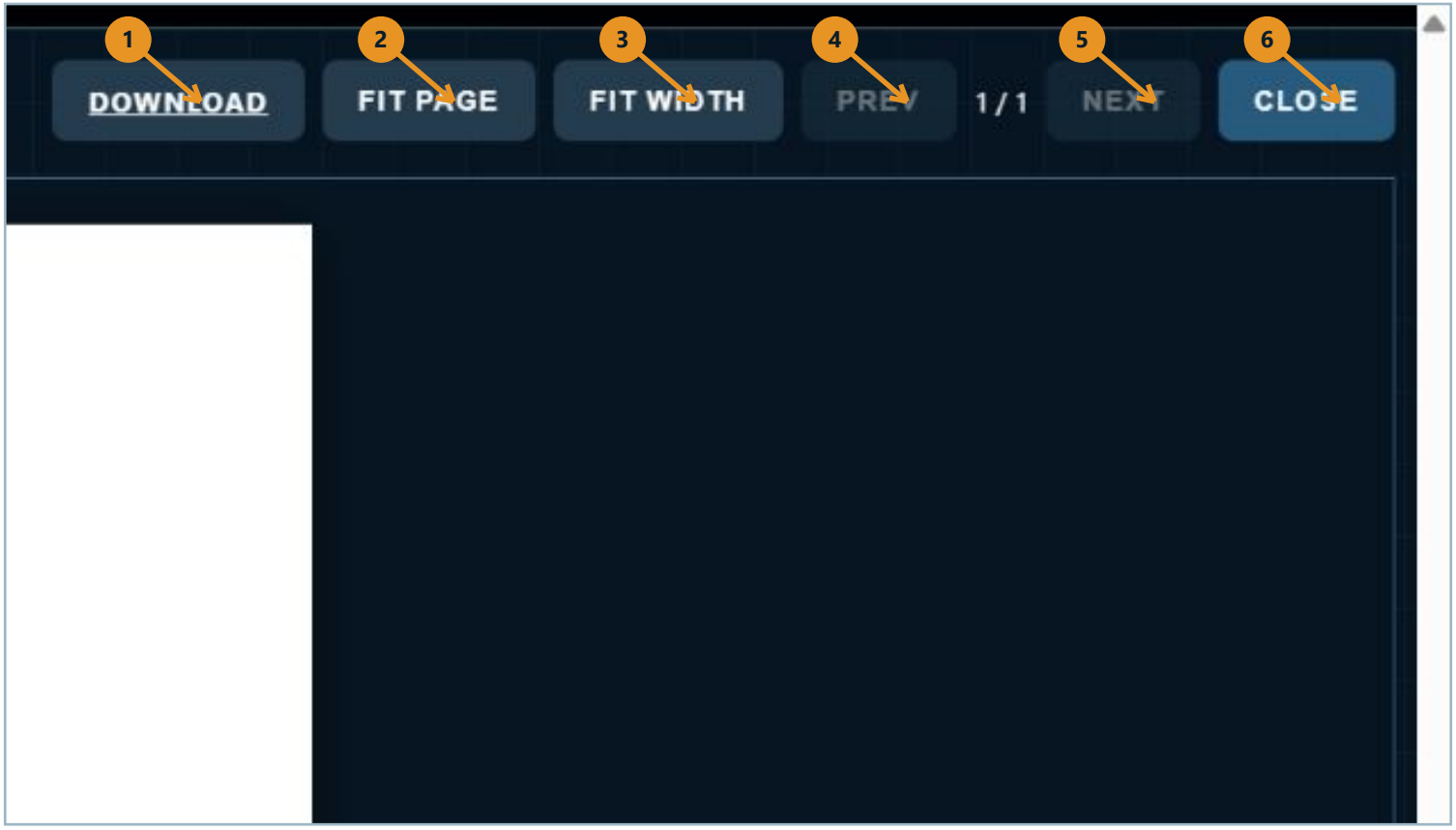
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

32 PDF drawing viewer

Illustrated detail 01 • orange numbers point to the named controls



1. DOWNLOAD
Save a separate copy of the file

2. FIT PAGE
Fit the complete drawing or path to the available viewer area.

3. FIT WIDTH
Fit the complete drawing or path to the available viewer area.

4. PREV
Use this named action/tab for the workflow described in this chapter

5. NEXT
Use this named action/tab for the workflow described in this chapter

6. CLOSE
Close this viewer/dialog and return to the underlying application screen.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

32 PDF drawing viewer

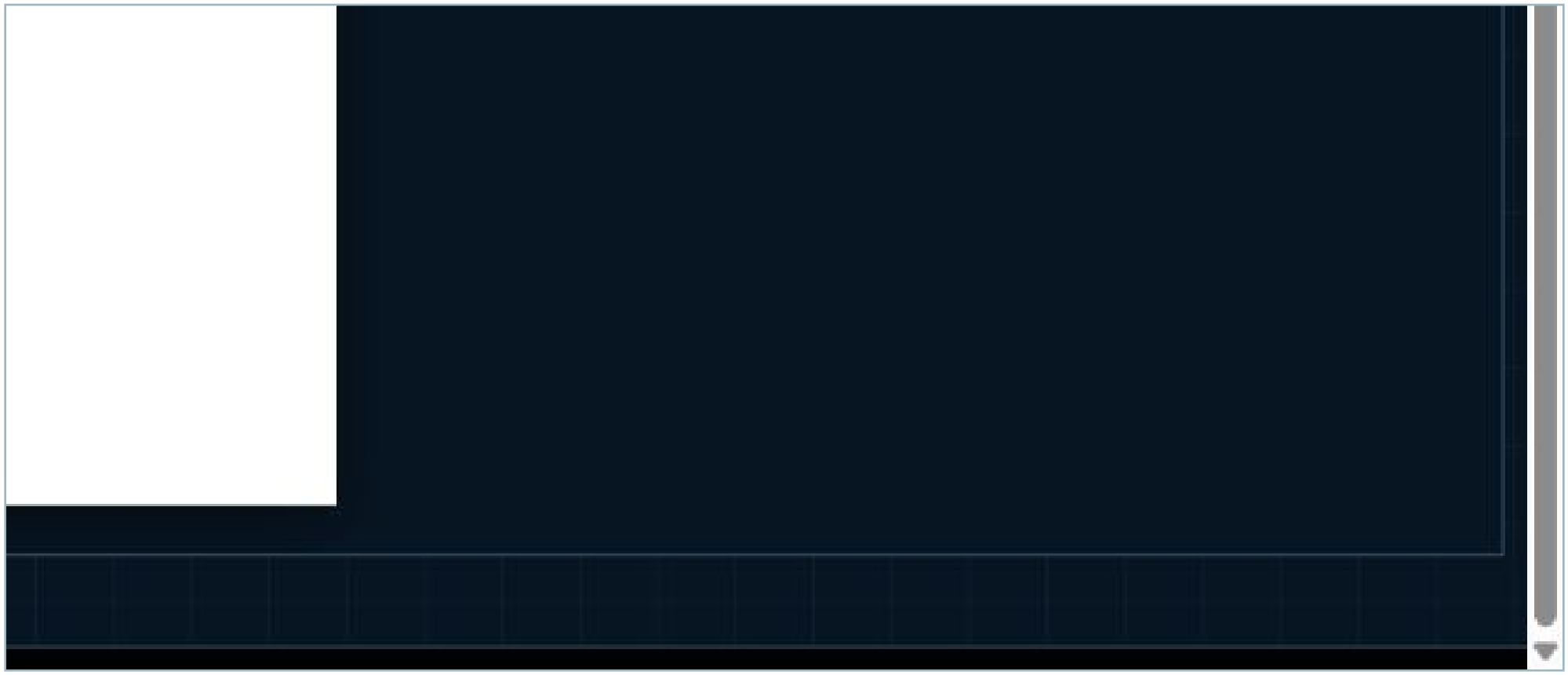
Illustrated detail 02 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

32 PDF drawing viewer

Illustrated detail 03 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
FIT PAGE	Fit the complete drawing or path to the available viewer area.
FIT WIDTH	Fit the complete drawing or path to the available viewer area.
PREV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEXT	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.

33 DXF / DWG drawing and dimensions

Workflow • read before using the illustrated controls

1. Use FIT DRAWING, +/− or mouse wheel to frame the drawing; drag to pan. Choose the required layout.
2. Toggle layers individually, or use All/None. Keep Snap on when selecting exact geometry points.
3. Choose Horizontal, Vertical or Diagonal dimension. Select two positions, then click where the dimension should be placed.
4. For Angle (2 lines), select the two lines then click the annotation position. Angle (3 points) uses the point-based method indicated by the viewer.
5. For Radius or Diameter select the circle/arc as appropriate and place the annotation. CLEAR CHECKS removes session checks.

Worked example

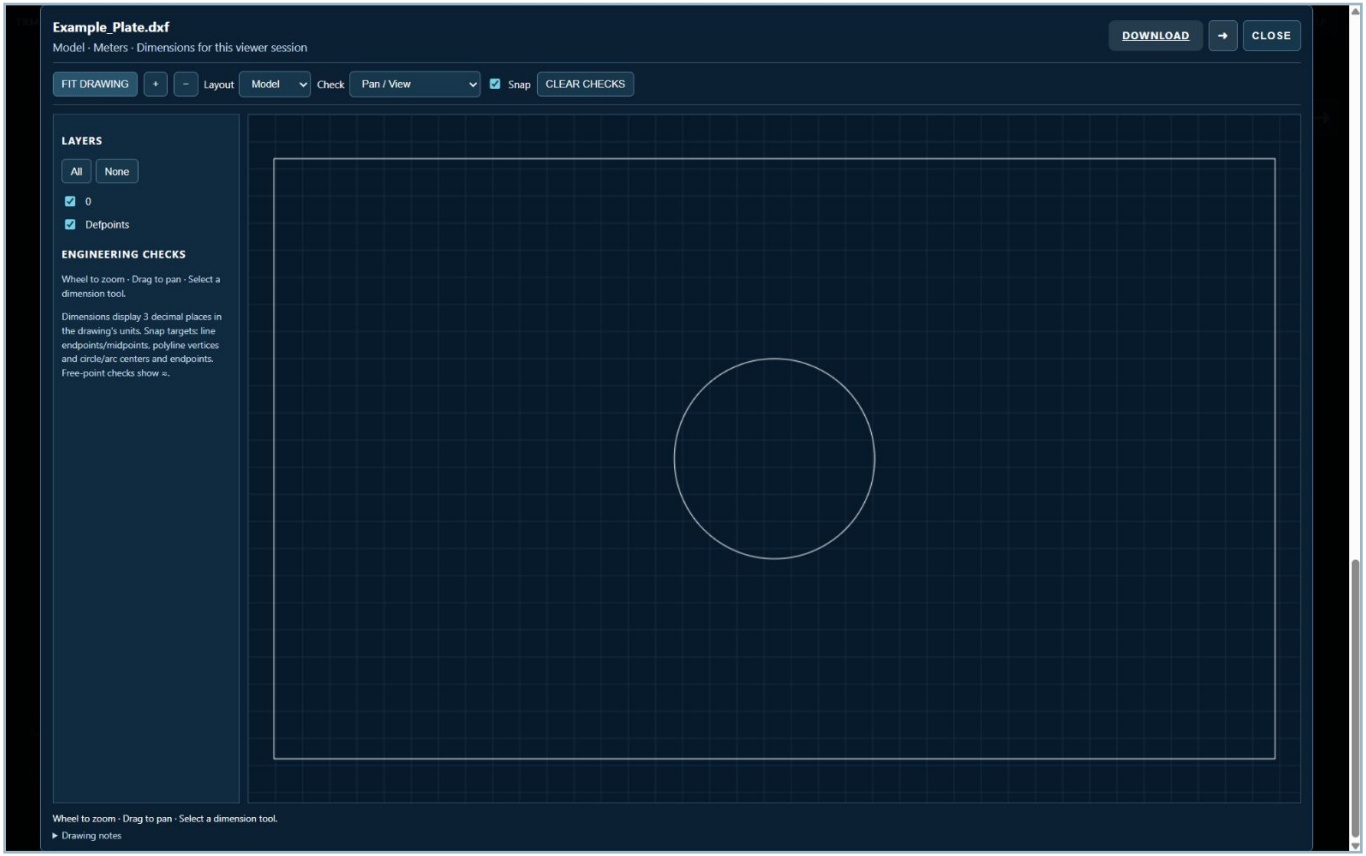
On a millimetre drawing, two points 50 mm apart produce a 50.000 mm dimension. Read the unit displayed in the drawing header; the example fixture screenshot uses its own source units.

Practical notes

Annotations are checks for the viewer session. Free-point measurements can be approximate (≈). Check the drawing source units and snap target; a visually similar drawing can have a different unit setting. DWG requires converter configuration; DXF can be opened directly.

33 DXF / DWG drawing and dimensions

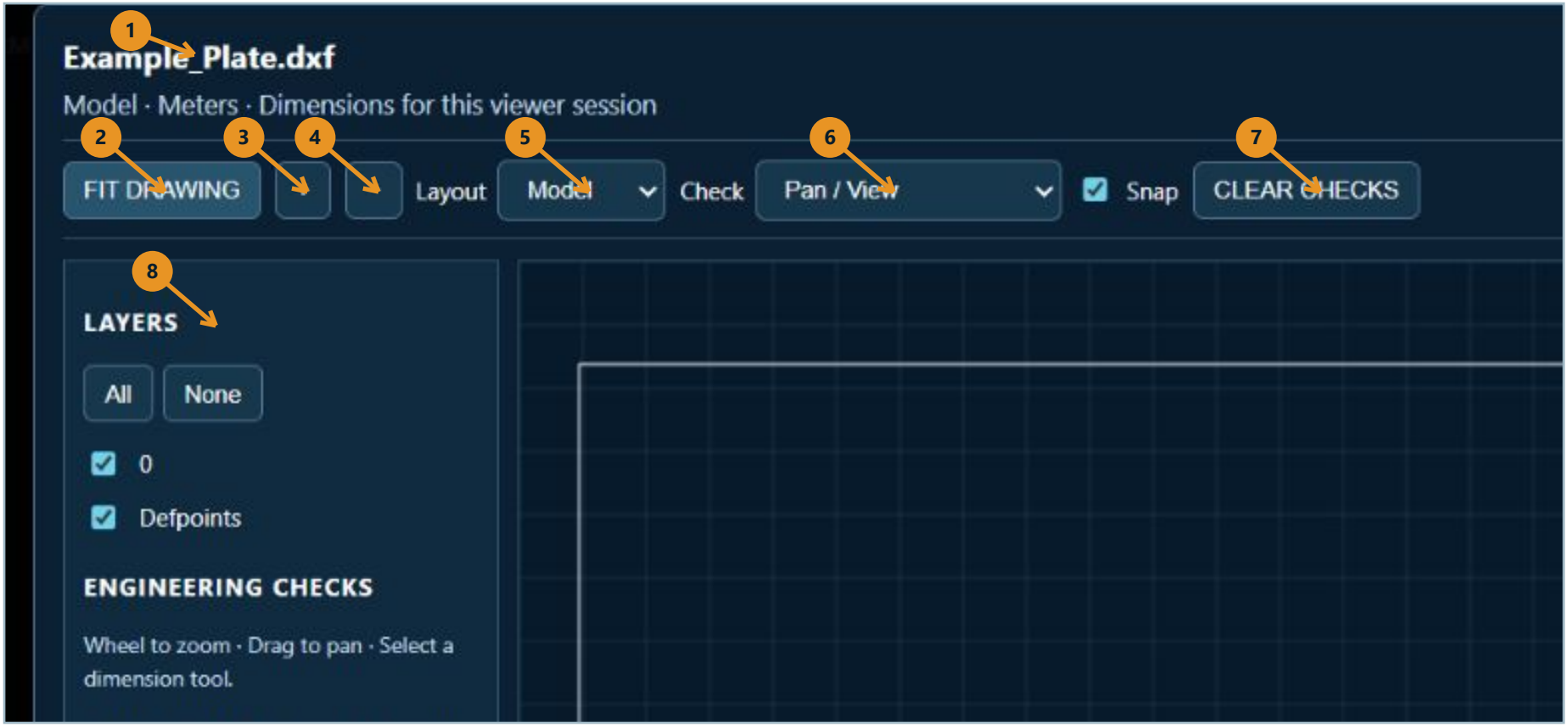
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

Illustrated detail 01 • orange numbers point to the named controls



1. Example_Plate.dxf
Read this section heading before using the controls below it.

2. FIT DRAWING
Fit the complete drawing or path to the available viewer area.

3. +
Change the viewer scale

4. –
Change the viewer scale

5. Model Layout1
Choose the required value

6. Pan / View Horizontal dimension Vertical dimension Diagonal
Choose the required value

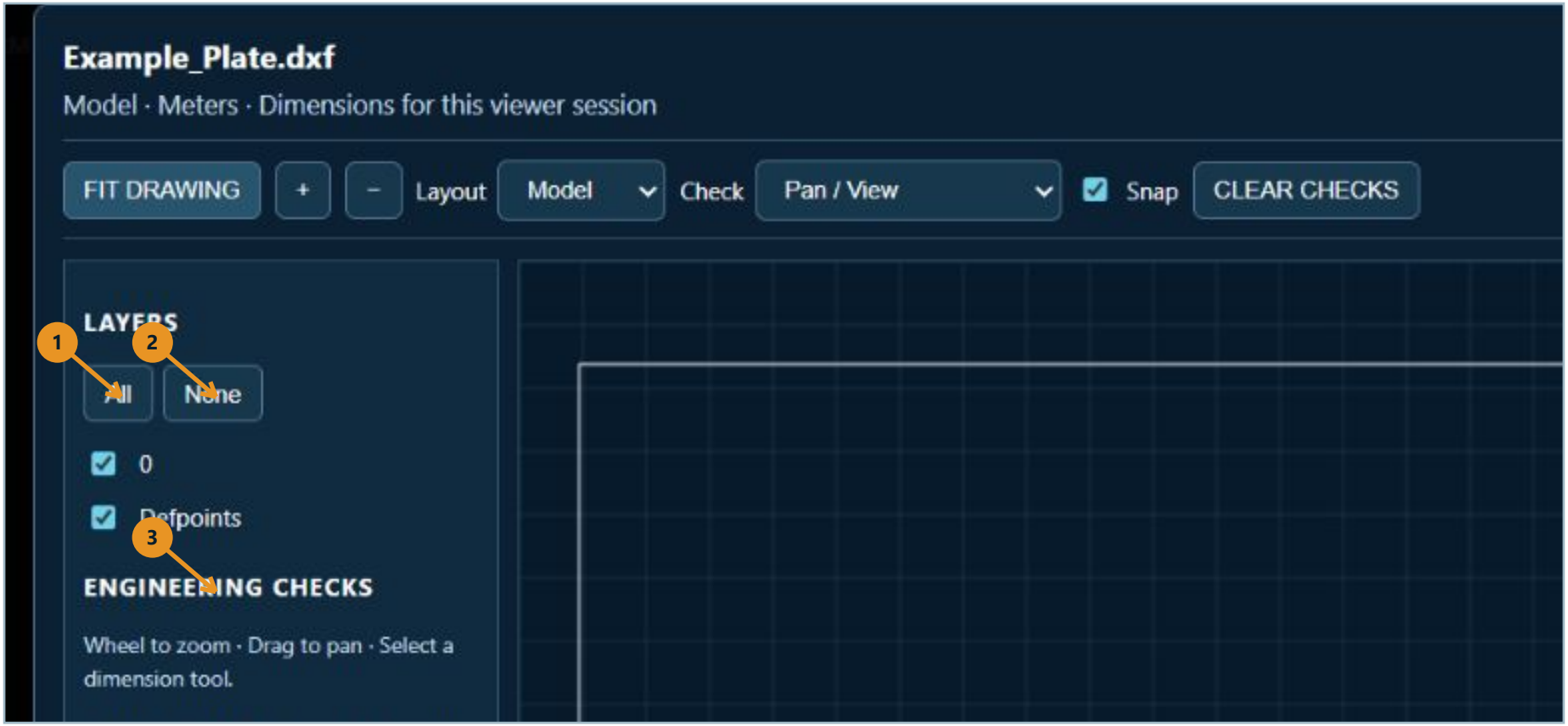
7. CLEAR CHECKS
Clear the current draft/checks or reset the filter as indicated

8. LAYERS
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

Illustrated detail 02 • orange numbers point to the named controls



1. All
Use this named action/tab for the workflow described in this chapter

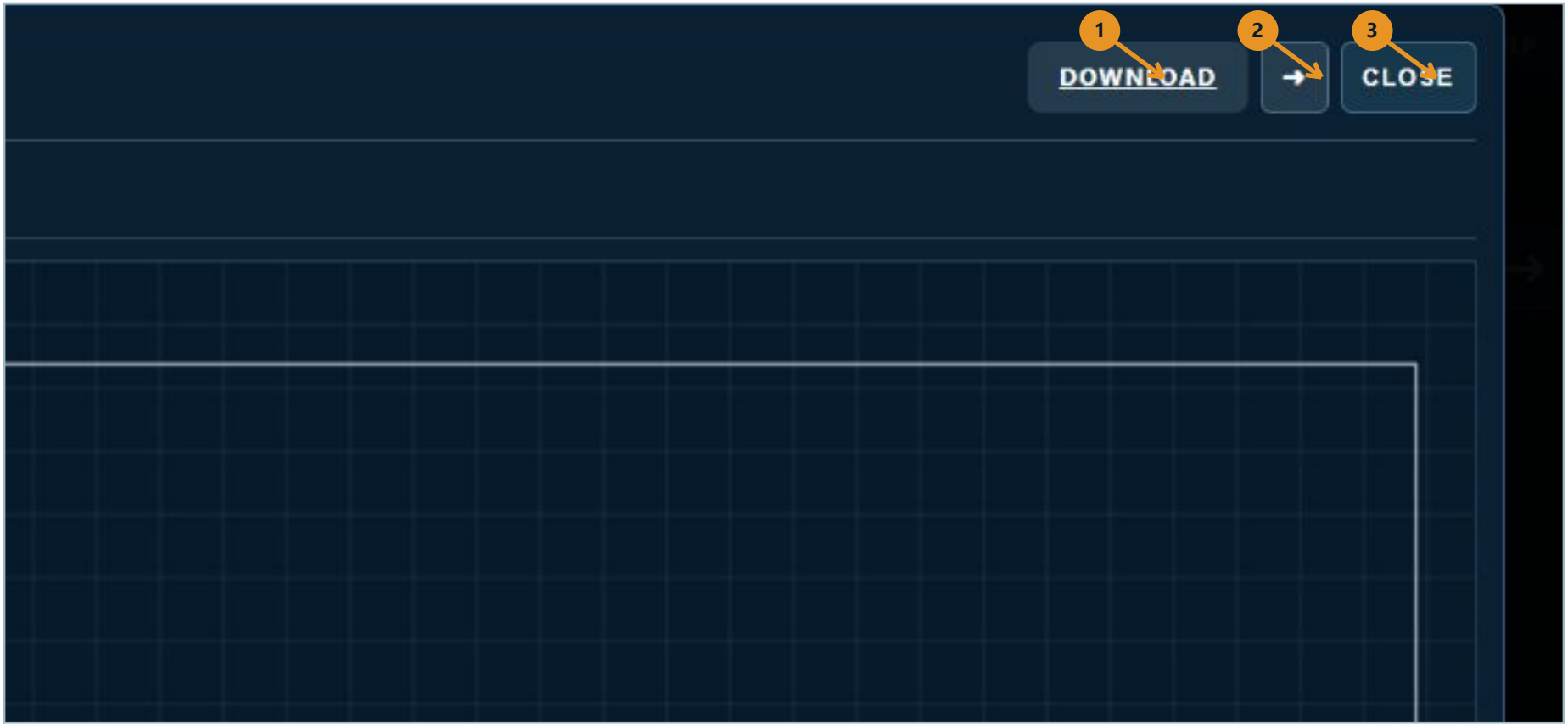
2. None
Use this named action/tab for the workflow described in this chapter

3. ENGINEERING CHECKS
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

Illustrated detail 03 • orange numbers point to the named controls



1. DOWNLOAD
Save a separate copy of the file

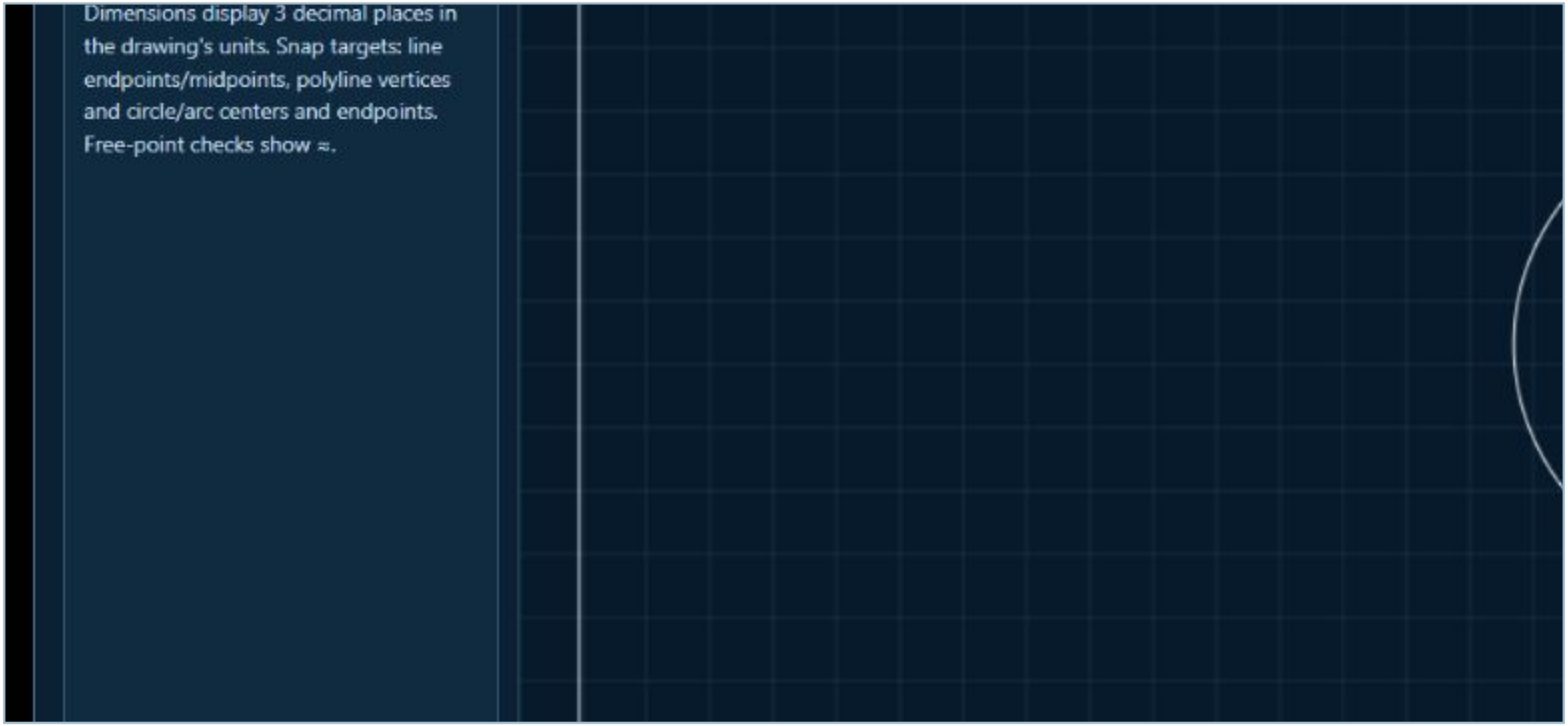
2. □
Use this named action/tab for the workflow described in this chapter

3. CLOSE
Close this viewer/dialog and return to the underlying application screen.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

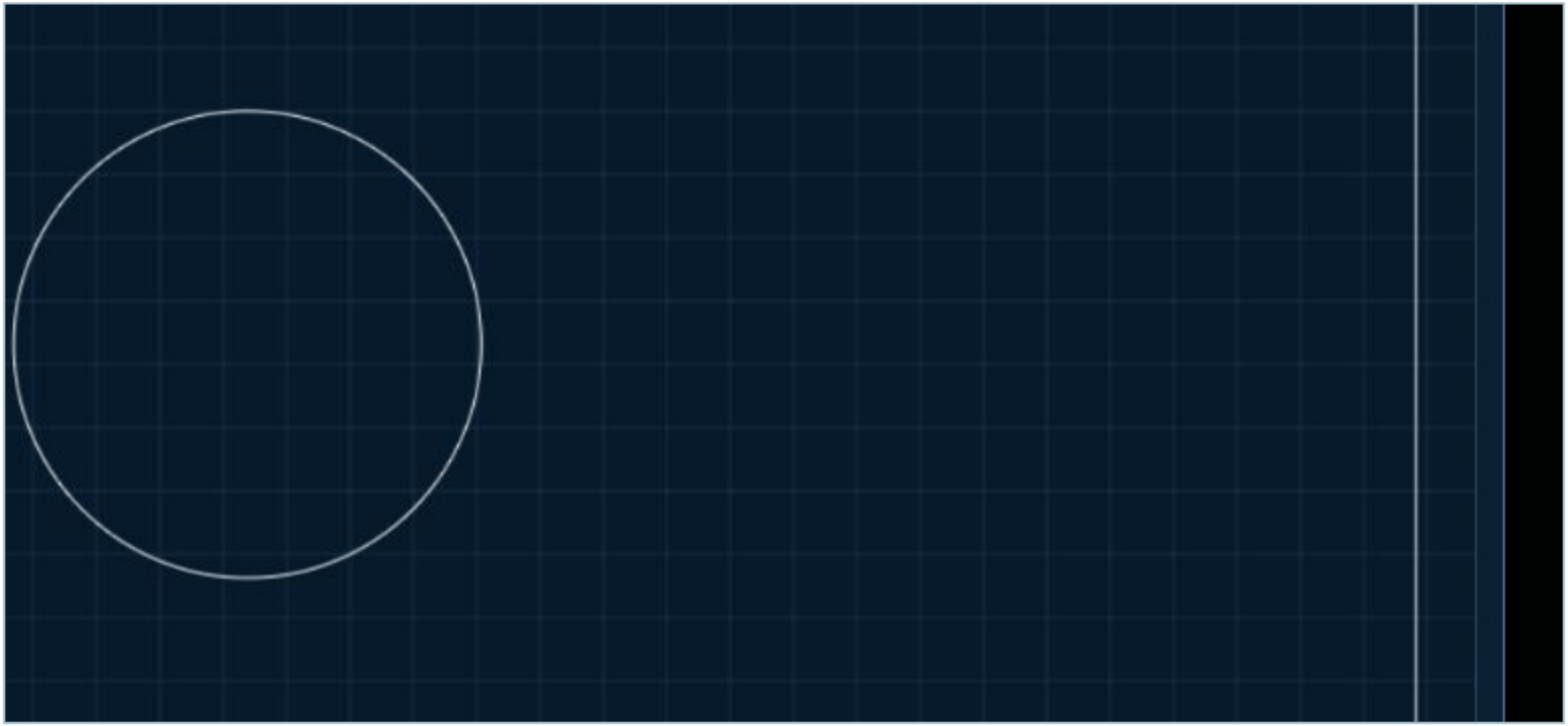
Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

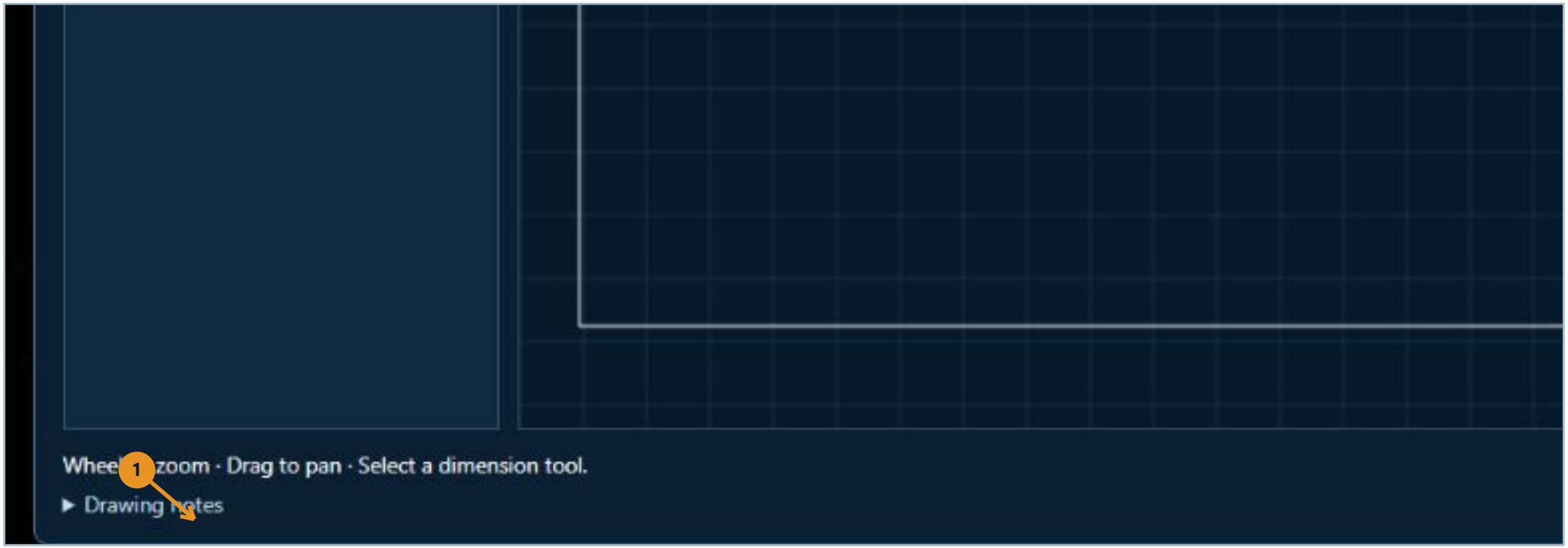
Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

33 DXF / DWG drawing and dimensions

Illustrated detail 06 • orange numbers point to the named controls



1. Drawing notes
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
FIT DRAWING	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.
−	Change the viewer scale. This does not alter the source geometry.
Model Layout1	Choose the required value. Available choices: Model; Layout1. The displayed records follow this screen’s scope and account access.
Pan / View Horizontal dimension Vertical dimension Diagonal dimension Angle (2 lines) Angle (3 points) Radius Diameter	Choose the required value. Available choices: Pan / View; Horizontal dimension; Vertical dimension; Diagonal dimension; Angle (2 lines); Angle (3 points); Radius; Diameter. The displayed records follow this screen’s scope and account access.
CLEAR CHECKS	Clear the current draft/checks or reset the filter as indicated. This is different from deleting a saved business record.
All	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
None	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
Drawing notes	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

34 3D CAD viewer

Workflow • read before using the illustrated controls

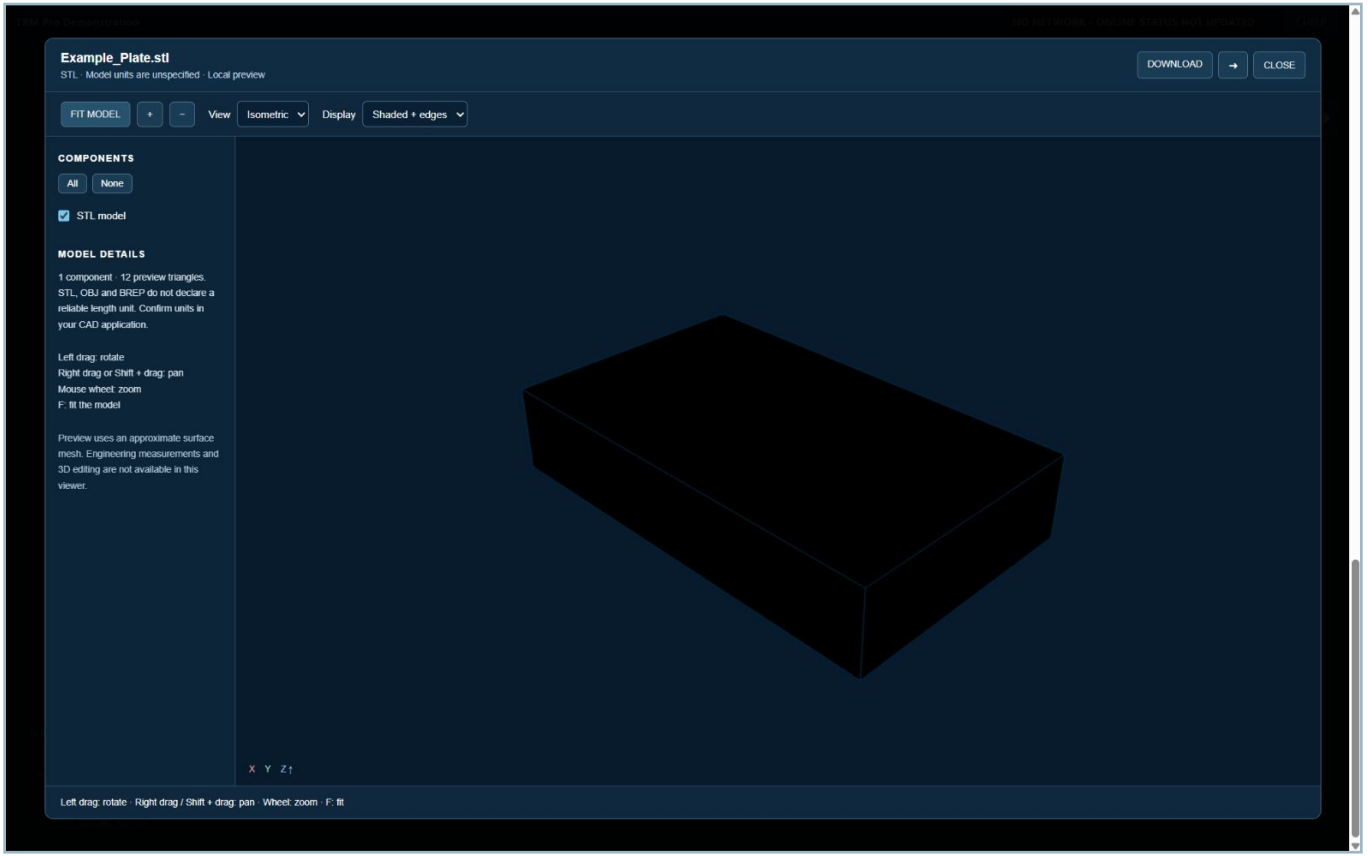
1. Open a supported 3D attachment from FILES.
2. Use the displayed view controls and mouse gestures to fit, rotate and zoom the part.
3. Check source-format notes. For native CAD formats export to STEP where suggested.
4. Download the source when needed and CLOSE to return to the operation.

Practical notes

Supported previews include STEP, IGES, STL, OBJ and BREP as indicated in the window. This is a viewing aid; it does not replace CAD modeling, inspection or validated manufacturing geometry.

34 3D CAD viewer

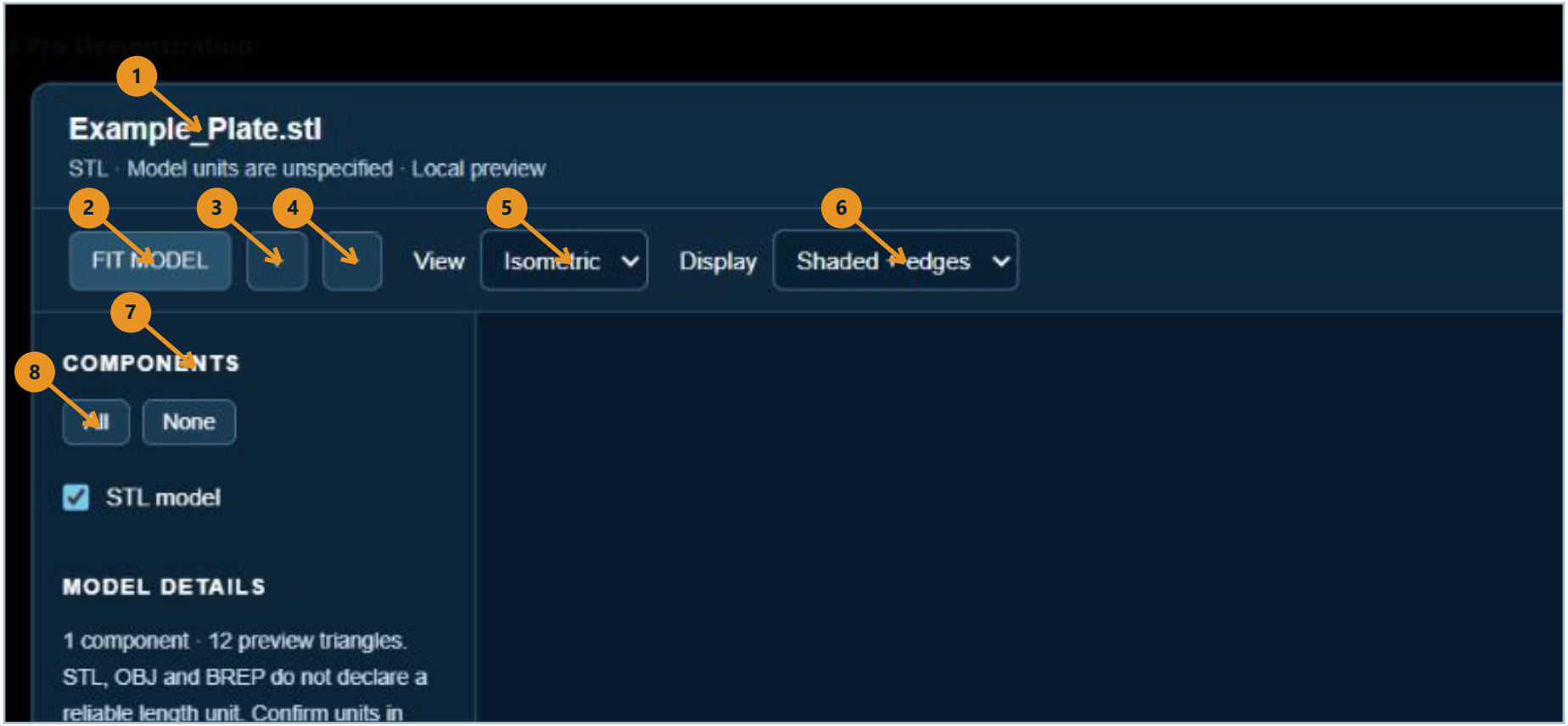
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

34 3D CAD viewer

Illustrated detail 01 • orange numbers point to the named controls



1. Example_Plate.stl
Read this section heading before using the controls below it.

2. FIT MODEL
Fit the complete drawing or path to the available viewer area.

3. +
Change the viewer scale

4. –
Change the viewer scale

5. Isometric Front Back Top Bottom Left Right
Choose the required value

6. Shaded Shaded + edges Wireframe
Choose the required value

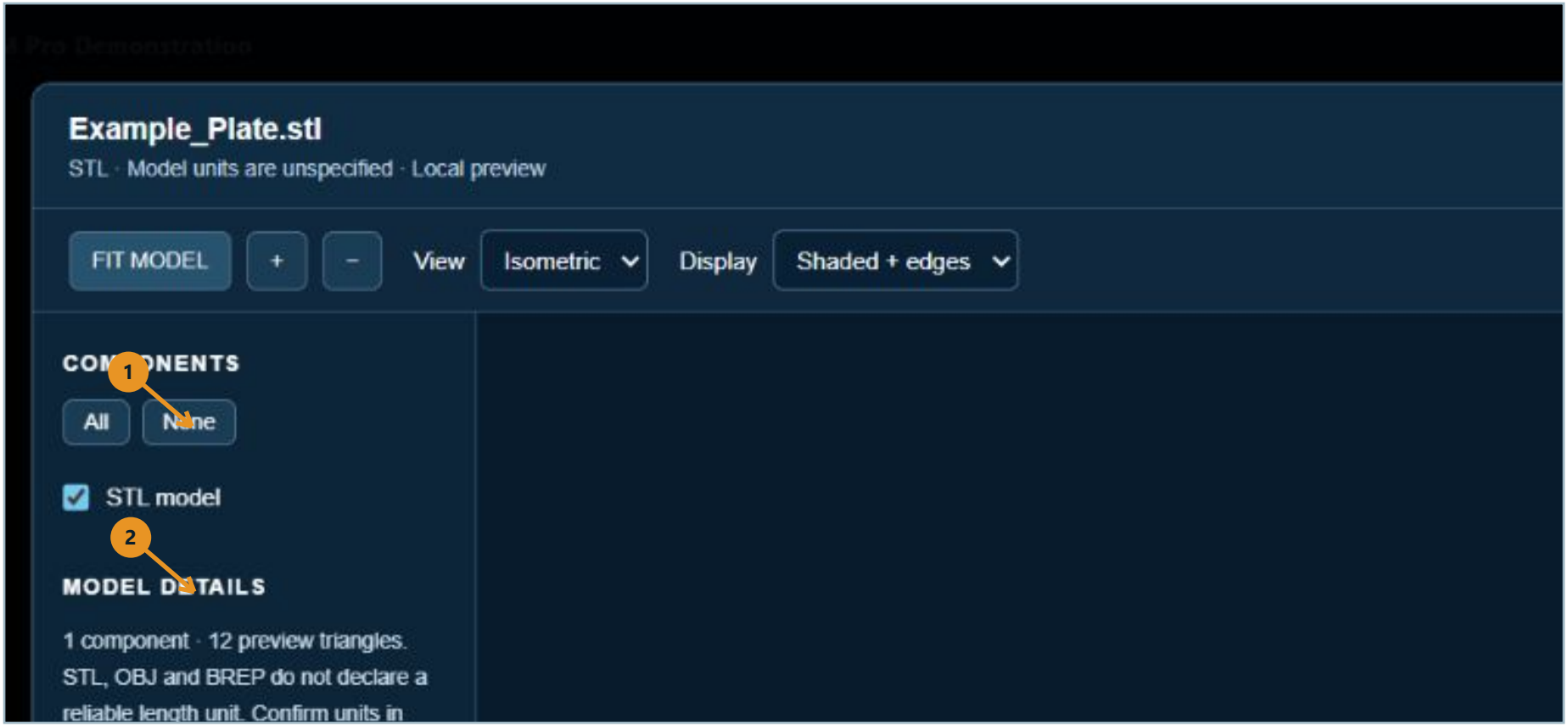
7. COMPONENTS
Read this section heading before using the controls below it.

8. All
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

34 3D CAD viewer

Illustrated detail 02 • orange numbers point to the named controls



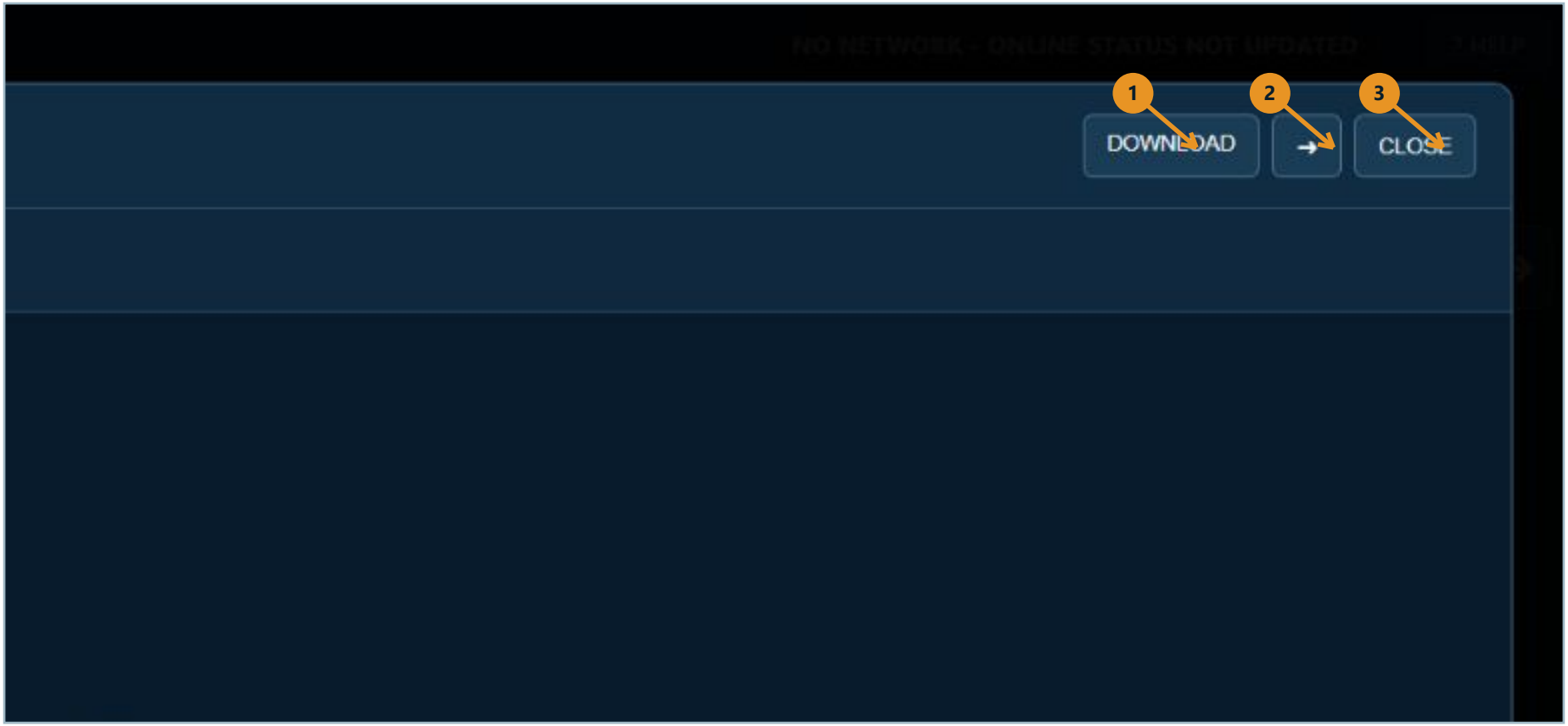
1. None
Use this named action/tab for the workflow described in this chapter

2. MODEL DETAILS
Read this section heading before using the controls below it.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

34 3D CAD viewer

Illustrated detail 03 • orange numbers point to the named controls



1. DOWNLOAD
Save a separate copy of the file

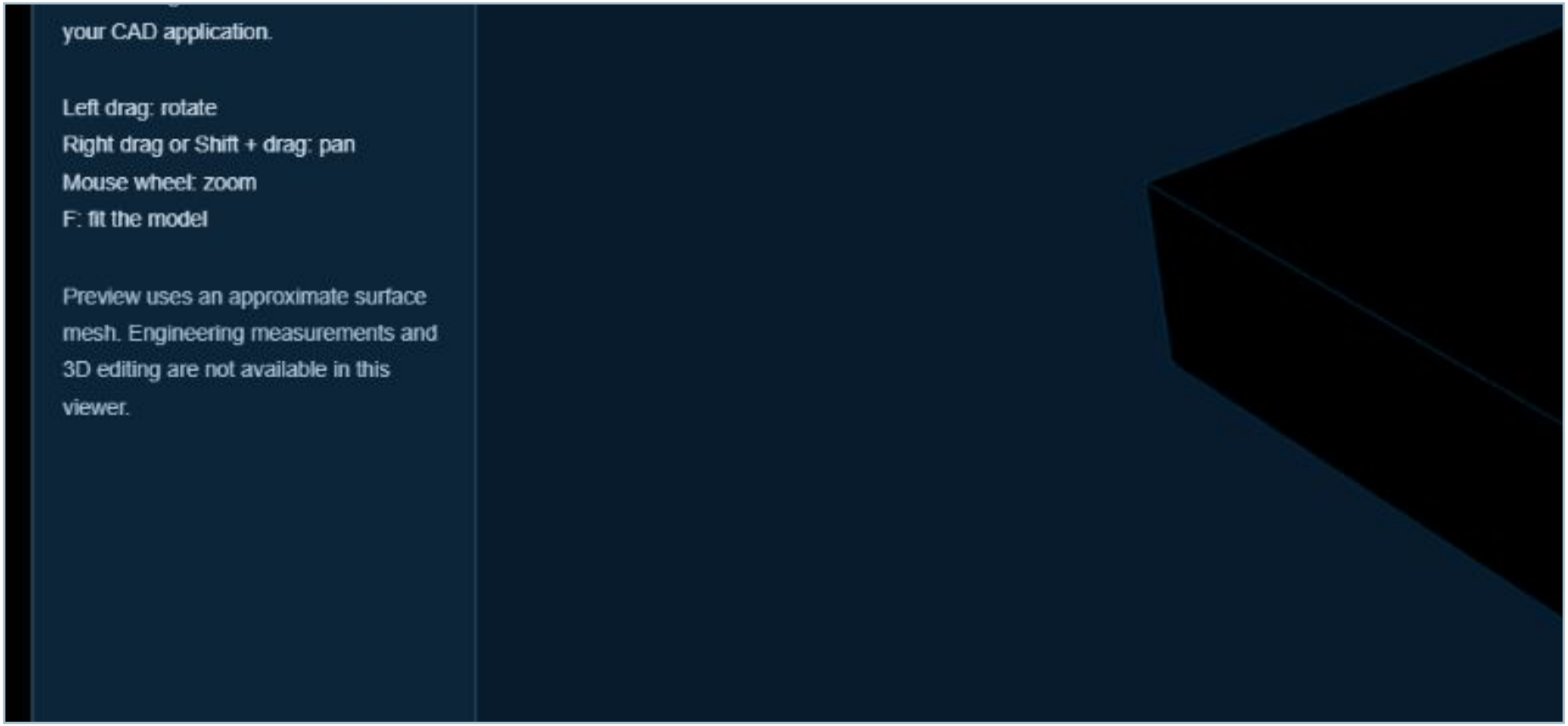
2. □
Use this named action/tab for the workflow described in this chapter

3. CLOSE
Close this viewer/dialog and return to the underlying application screen.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

34 3D CAD viewer

Illustrated detail 04 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

34 3D CAD viewer

Illustrated detail 05 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
FIT MODEL	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.
−	Change the viewer scale. This does not alter the source geometry.
Isometric Front Back Top Bottom Left Right	Choose the required value. Available choices: Isometric; Front; Back; Top; Bottom; Left; Right. The displayed records follow this screen's scope and account access.
Shaded Shaded + edges Wireframe	Choose the required value. Available choices: Shaded; Shaded + edges; Wireframe. The displayed records follow this screen's scope and account access.
All	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
None	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

35 Fanuc NC editor: milling

Workflow • read before using the illustrated controls

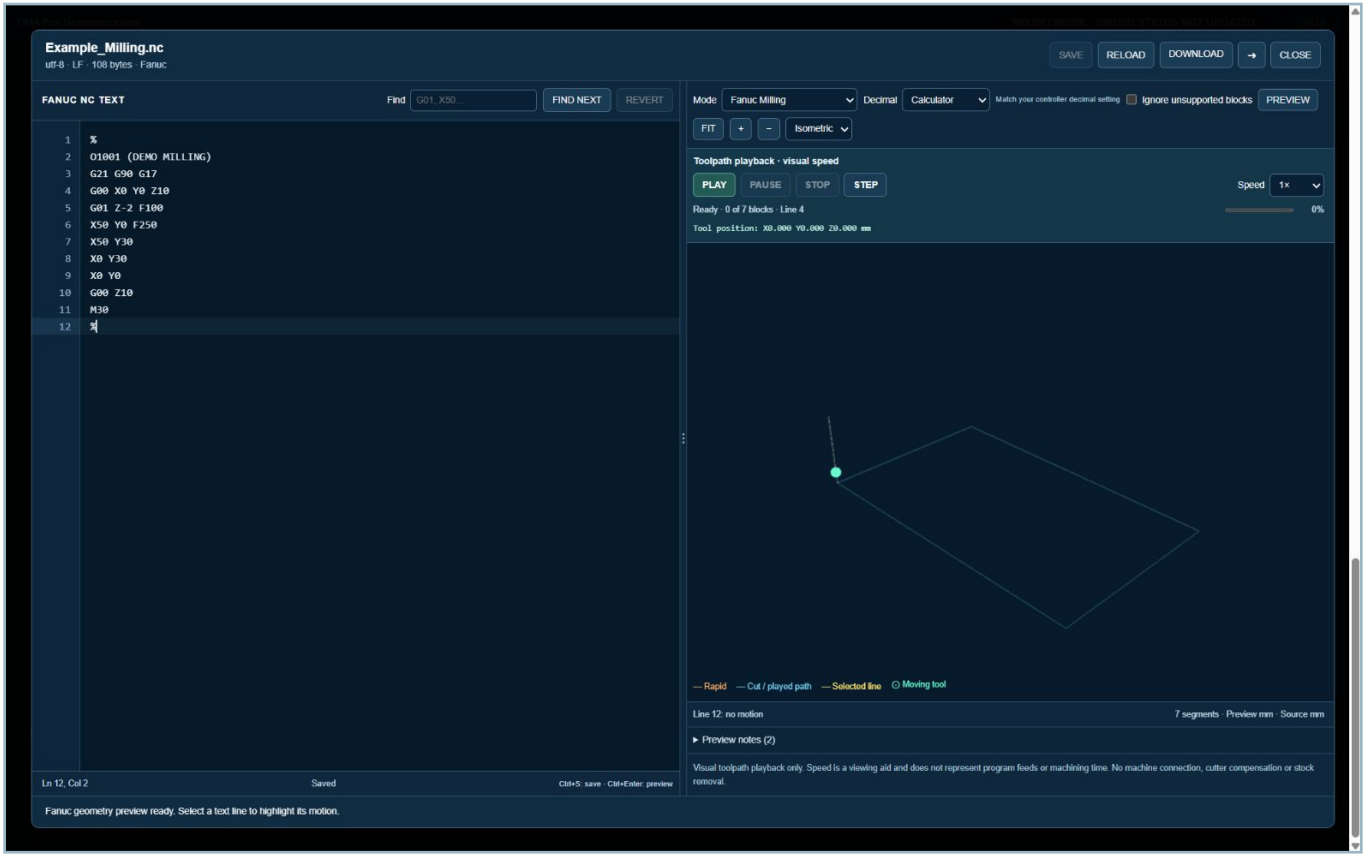
1. Open a program attachment. The left pane contains editable text; the right pane contains the toolpath.
2. Drag the vertical separator with the mouse to adjust the pane widths. Choose or confirm Fanuc Milling mode.
3. Use Find / FIND NEXT to locate a block. Select a text line to highlight its motion in the preview.
4. After editing choose PREVIEW (Ctrl+Enter). Review notes for unsupported blocks. SAVE (Ctrl+S) updates the same attachment; REVERT discards unsaved text and RELOAD reloads the saved file.
5. Use FIT and +/− to frame the toolpath. DOWNLOAD saves a separate copy.

Practical notes

The previous 50,000-line preview restriction has been removed. Large programs still depend on memory and viewer performance. The editor/save file-size constraint remains separate (2 MiB in this build). The preview interprets supported Fanuc geometry; it does not validate a program for machining.

35 Fanuc NC editor: milling

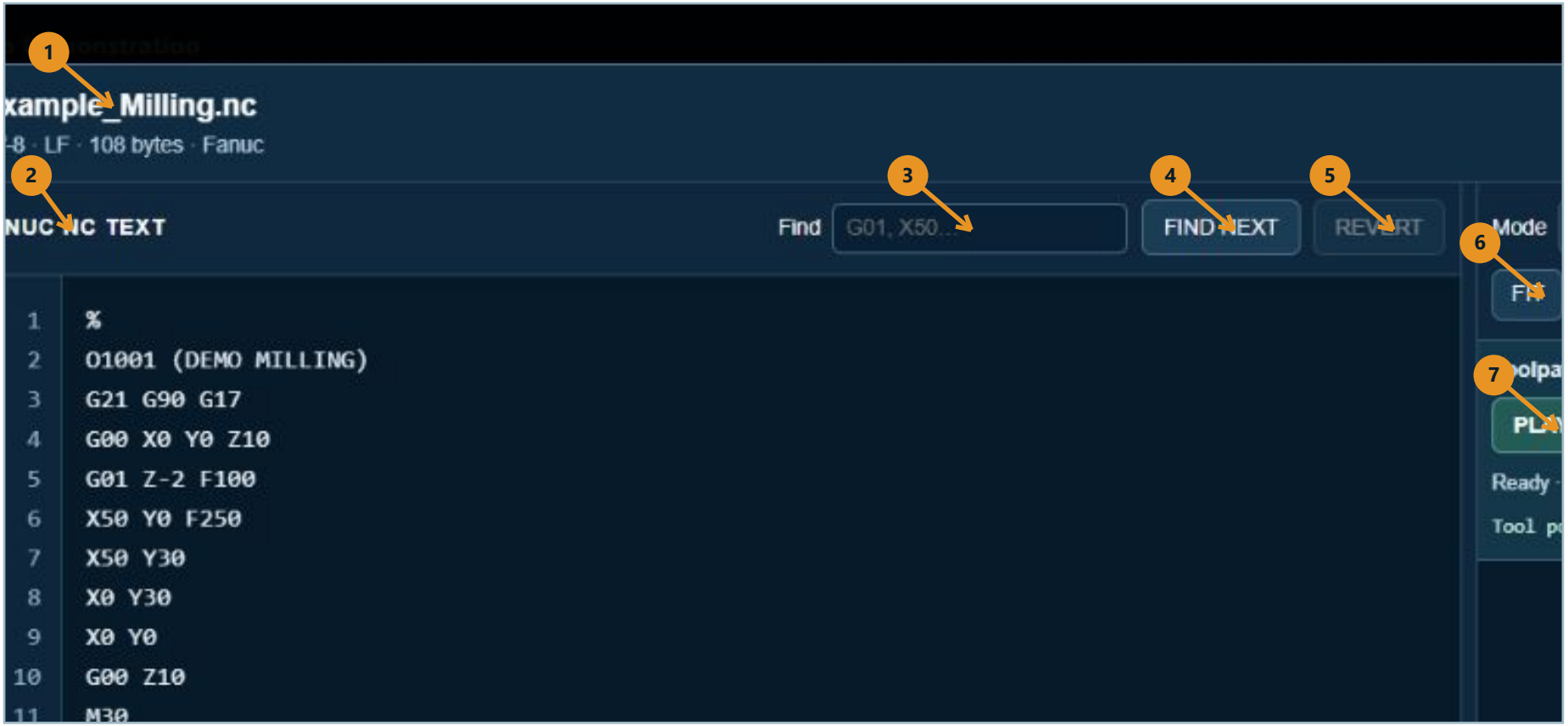
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 01 • orange numbers point to the named controls



1. Example_Milling.nc
Read this section heading before using the controls below it.

2. FANUC NC TEXT
Read this section heading before using the controls below it.

3. Find text
Enter or review this value as labeled

4. FIND NEXT
Find the next occurrence of the entered search text in the NC program.

5. REVERT
Discard unsaved text and return to the current saved content.

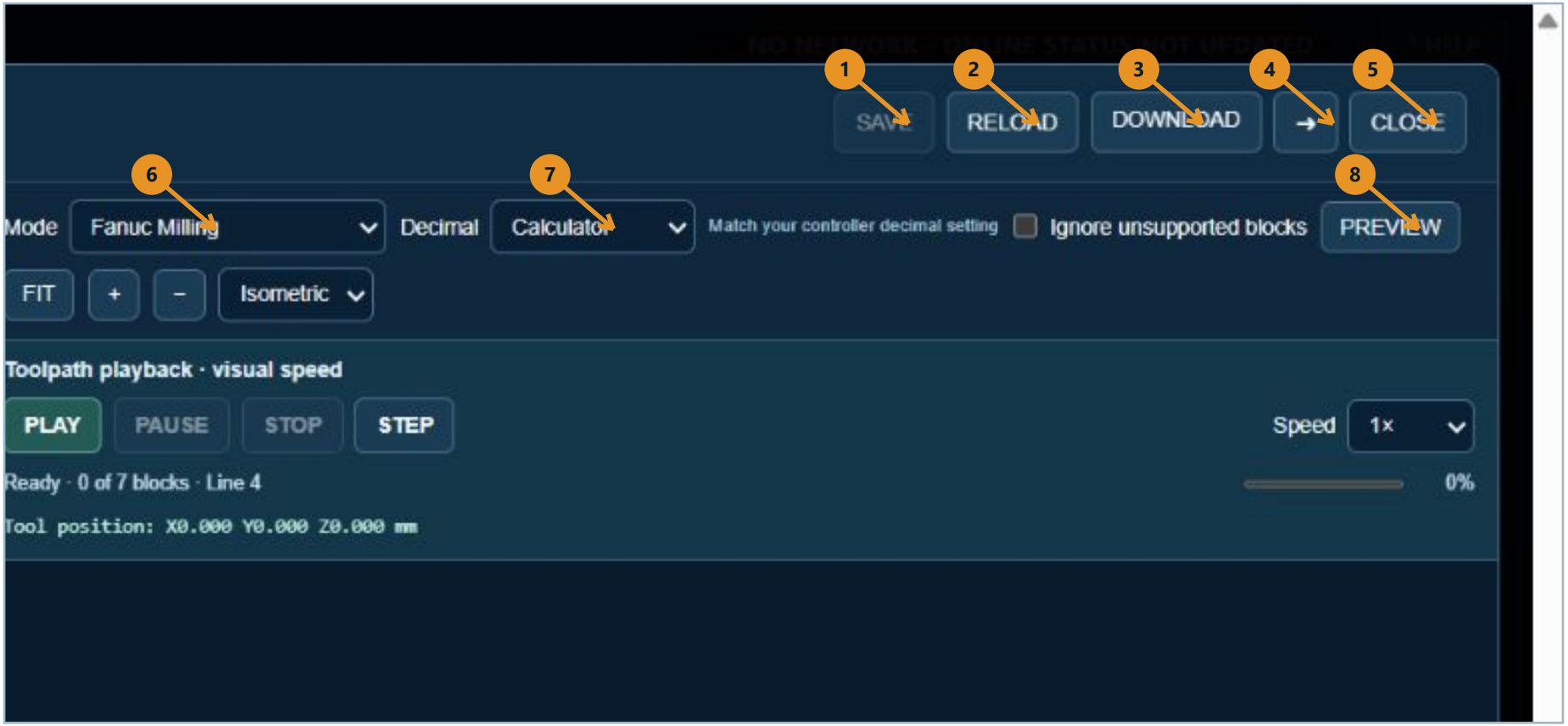
6. FIT
Fit the complete drawing or path to the available viewer area.

7. PLAY
Start or resume visual toolpath playback after a valid preview.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 02 • orange numbers point to the named controls



1. SAVE
Commit the reviewed fields for this form

2. RELOAD
Reload the saved source

3. DOWNLOAD
Save a separate copy of the file

4. □
Use this named action/tab for the workflow described in this chapter

5. CLOSE
Close this viewer/dialog and return to the underlying application screen.

6. Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut
Choose the required value

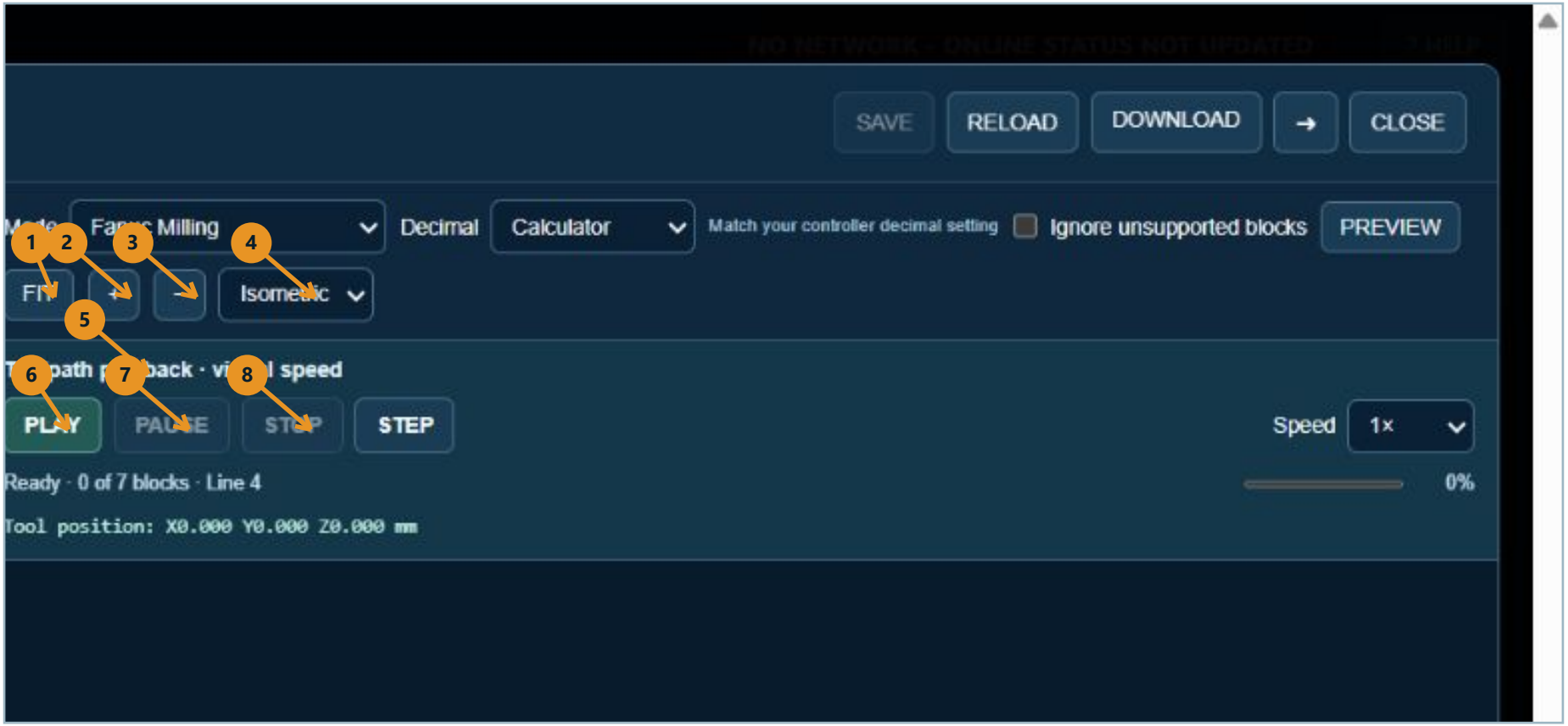
7. Calculator Standard IS-B
Choose the required value

8. PREVIEW
Rebuild geometry from the current program text and mode

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 03 • orange numbers point to the named controls



1. FIT
Fit the complete drawing or path to the available viewer area.

2. +
Change the viewer scale

3. –
Change the viewer scale

4. Isometric Front Top
Choose the required value

5. Toolpath playback · visual speed
Read this section heading before using the controls below it.

6. PLAY
Start or resume visual toolpath playback after a valid preview.

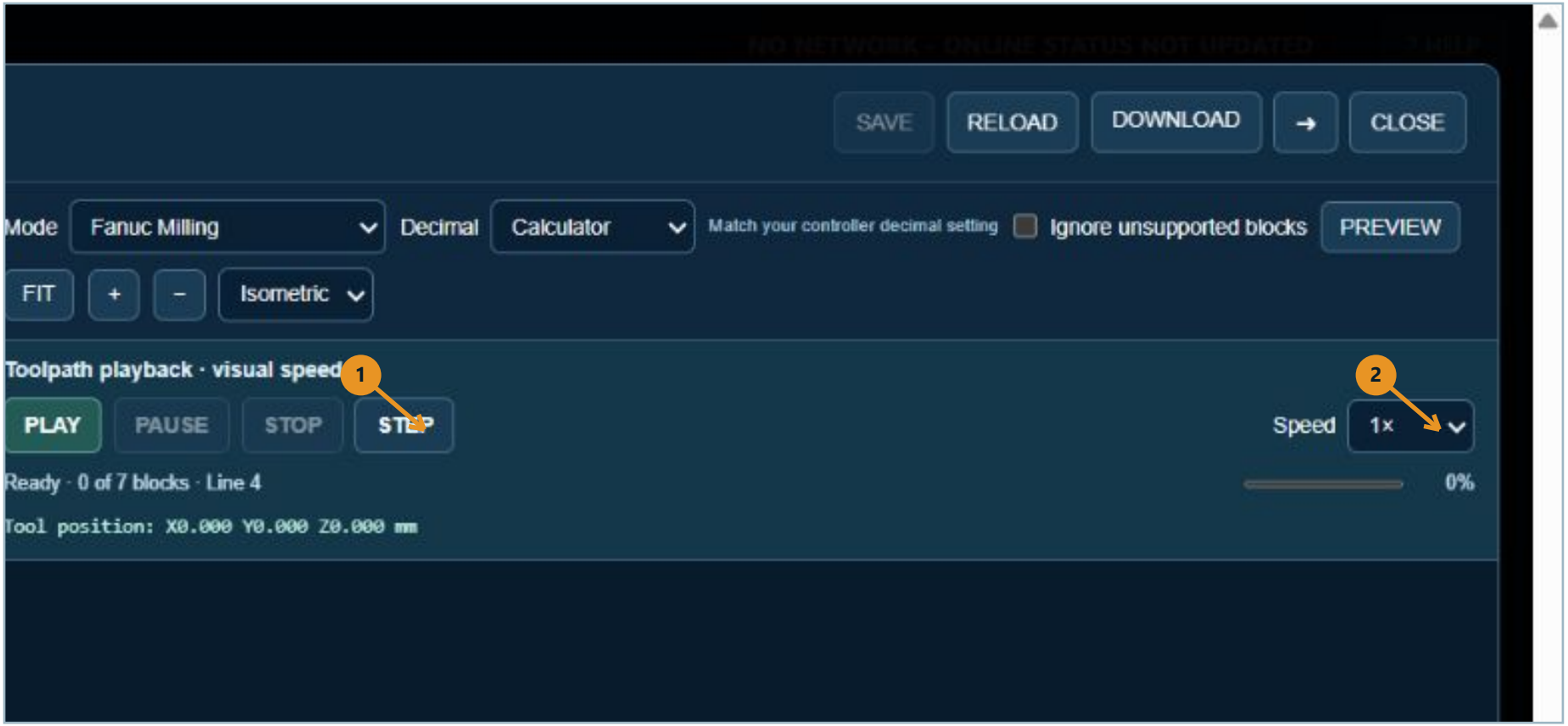
7. PAUSE
Pause playback at the current tool position.

8. STOP
Stop playback and reset to its starting position.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 04 • orange numbers point to the named controls



1. STEP
Advance visual playback one block at a time.

2. 0.25× 0.5× 1× 2× 5× 10×
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 05 • orange numbers point to the named controls



1. Fanuc NC program text
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 07 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Illustrated detail 08 • orange numbers point to the named controls



1. Preview notes (2)
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

35 Fanuc NC editor: milling

Control reference • field meanings and dropdown choices

SAVE	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
RELOAD	Reload the saved source. Review any unsaved text before using this action.
DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
Find text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FIND NEXT	Find the next occurrence of the entered search text in the NC program.
REVERT	Discard unsaved text and return to the current saved content.
Fanuc NC program text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut	Choose the required value. Available choices: Fanuc Turning (system A); Fanuc Milling; Fanuc Wire-cut. The displayed records follow this screen's scope and account access.
Calculator Standard IS-B	Choose the required value. Available choices: Calculator; Standard IS-B. The displayed records follow this screen's scope and account access.
PREVIEW	Rebuild geometry from the current program text and mode. Read unsupported/ignored-block notes.
FIT	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.
−	Change the viewer scale. This does not alter the source geometry.

Isometric Front Top	Choose the required value. Available choices: Isometric; Front; Top. The displayed records follow this screen’s scope and account access.
PLAY	Start or resume visual toolpath playback after a valid preview.
PAUSE	Pause playback at the current tool position.
STOP	Stop playback and reset to its starting position.
STEP	Advance visual playback one block at a time.
0.25× 0.5× 1× 2× 5× 10×	Choose the required value. Available choices: 0.25×; 0.5×; 1×; 2×; 5×; 10×. The displayed records follow this screen’s scope and account access.
Preview notes (2)	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

36 Fanuc turning mode and unsupported blocks

Workflow • read before using the illustrated controls

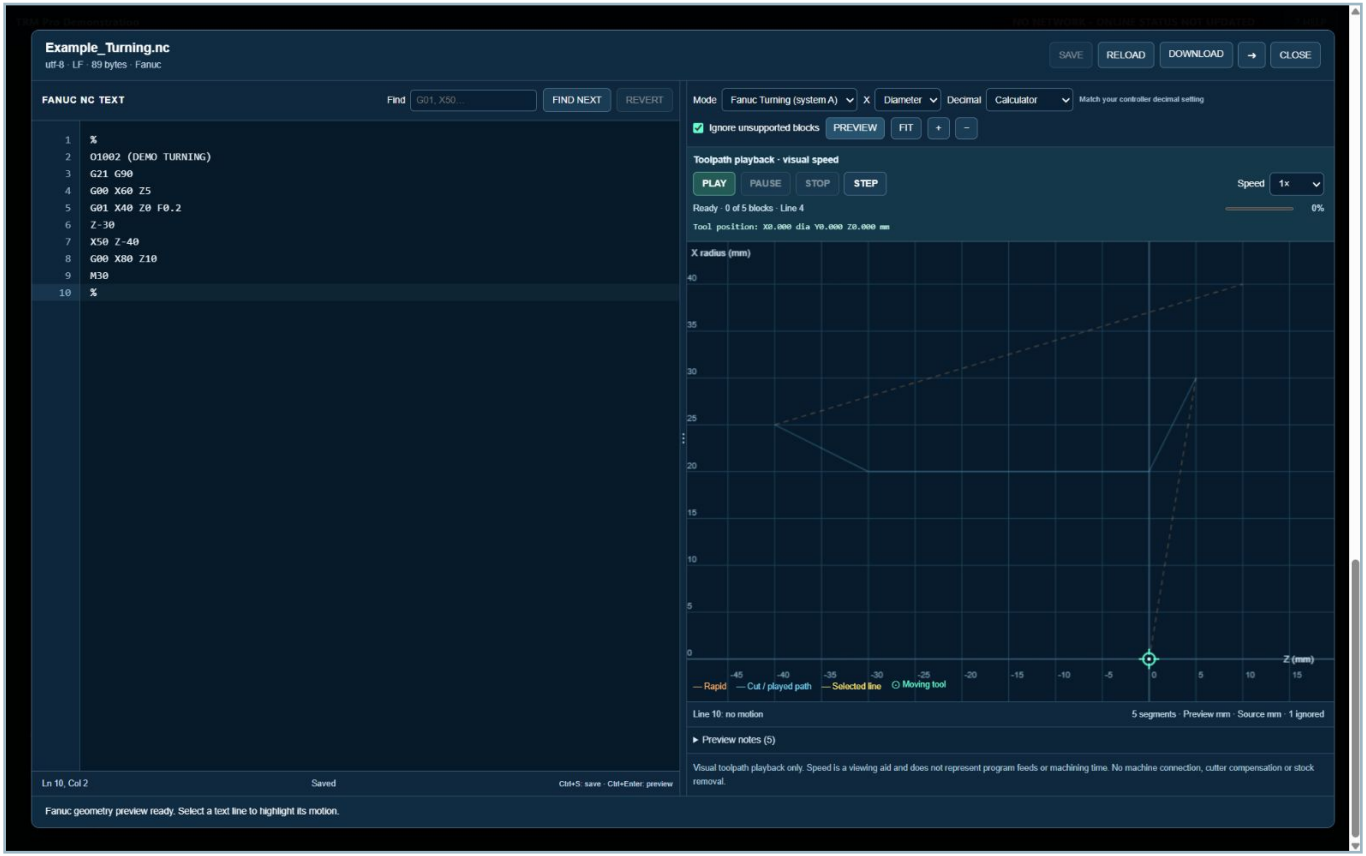
1. Confirm Fanuc Turning (system A) for X/Z turning geometry.
2. Select Diameter or Radius for the controller X convention. Choose the decimal setting to match the controller.
3. Review partial-preview warnings. With Ignore unsupported blocks unchecked, preview stops at an unsupported block.
4. If you intentionally tick Ignore unsupported blocks, rebuild PREVIEW and review the ignored-block count and notes.

Practical notes

System A uses X/Z absolute and U/W incremental values. G90 can be a turning canned cycle rather than the milling absolute-mode command. The demonstration shows it ignored; the remaining geometry is only a partial interpretation of program behavior. Never assume an ignored command is harmless on the real machine.

36 Fanuc turning mode and unsupported blocks

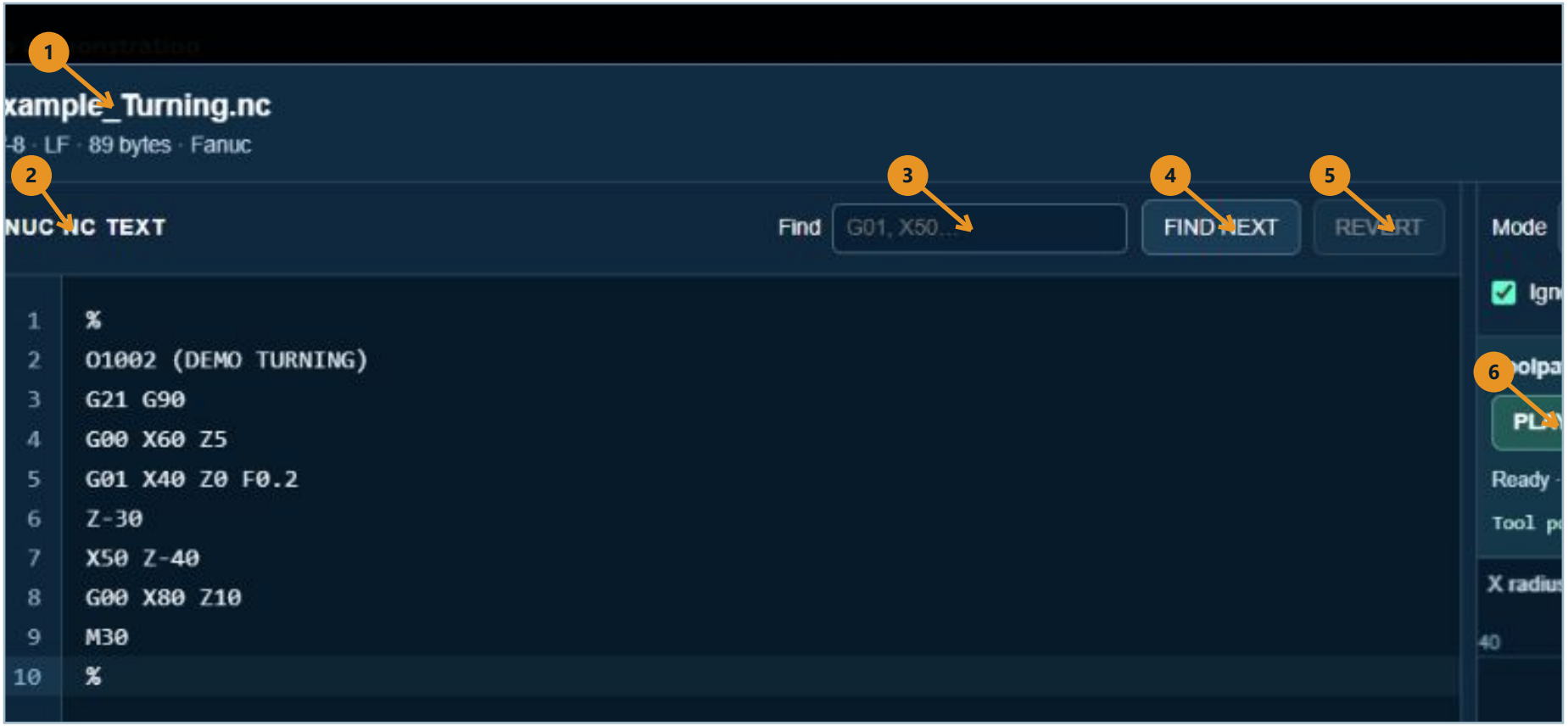
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 01 • orange numbers point to the named controls



1. Example_Turning.nc
Read this section heading before using the controls below it.

2. FANUC NC TEXT
Read this section heading before using the controls below it.

3. Find text
Enter or review this value as labeled

4. FIND NEXT
Find the next occurrence of the entered search text in the NC program.

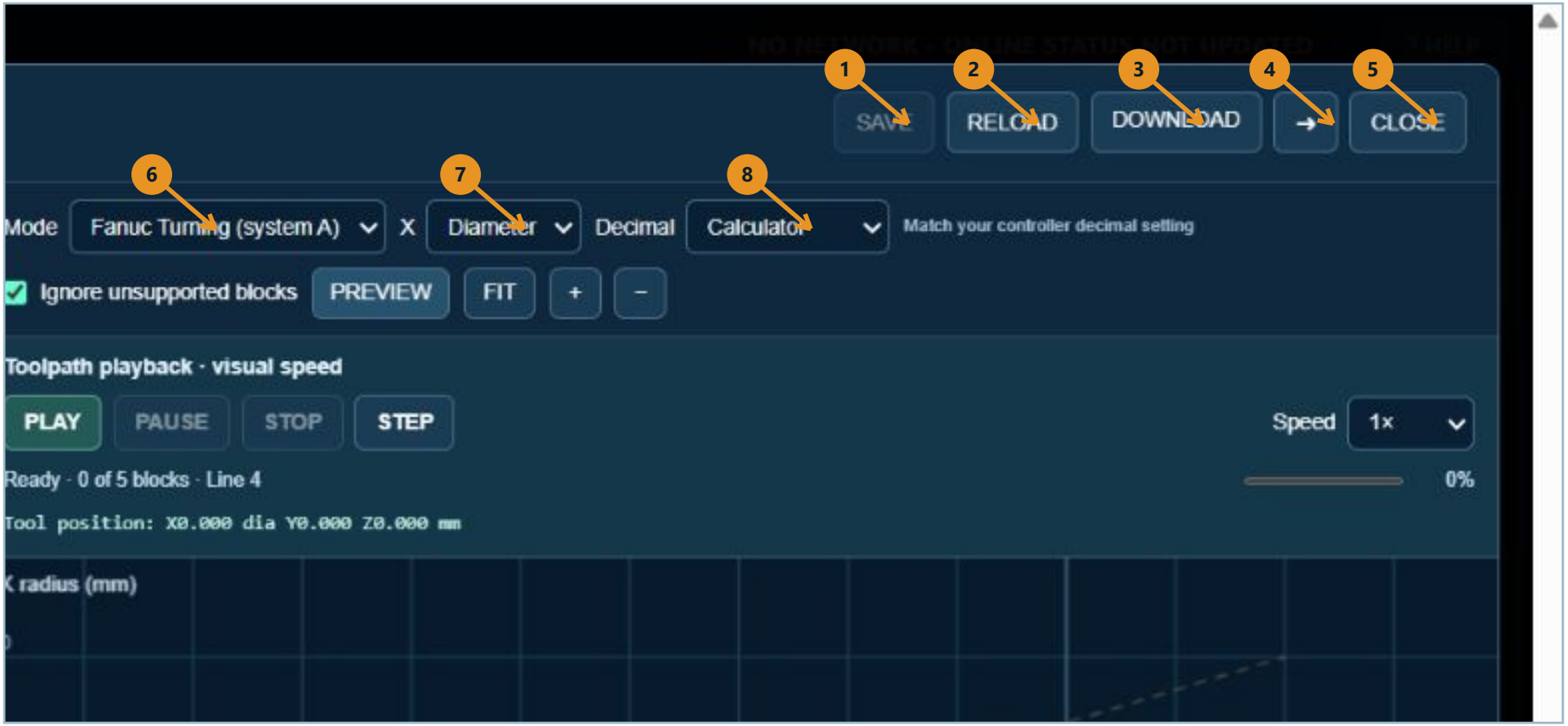
5. REVERT
Discard unsaved text and return to the current saved content.

6. PLAY
Start or resume visual toolpath playback after a valid preview.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 02 • orange numbers point to the named controls



1. SAVE
Commit the reviewed fields for this form

2. RELOAD
Reload the saved source

3. DOWNLOAD
Save a separate copy of the file

4. □
Use this named action/tab for the workflow described in this chapter

5. CLOSE
Close this viewer/dialog and return to the underlying application screen.

6. Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut
Choose the required value

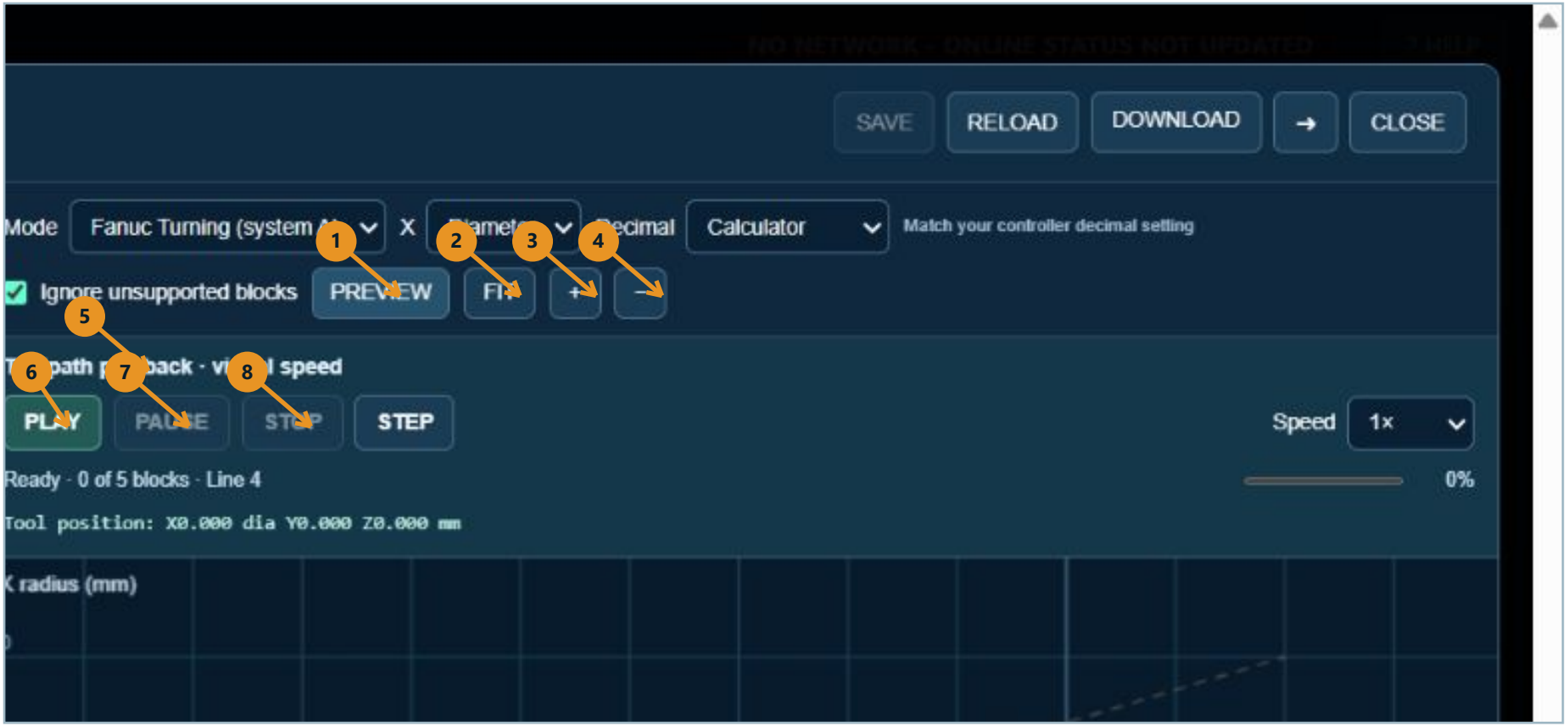
7. Diameter Radius
Choose the required value

8. Calculator Standard IS-B
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 03 • orange numbers point to the named controls



1. PREVIEW
Rebuild geometry from the current program text and mode

2. FIT
Fit the complete drawing or path to the available viewer area.

3. +
Change the viewer scale

4. –
Change the viewer scale

5. Toolpath playback · visual speed
Read this section heading before using the controls below it.

6. PLAY
Start or resume visual toolpath playback after a valid preview.

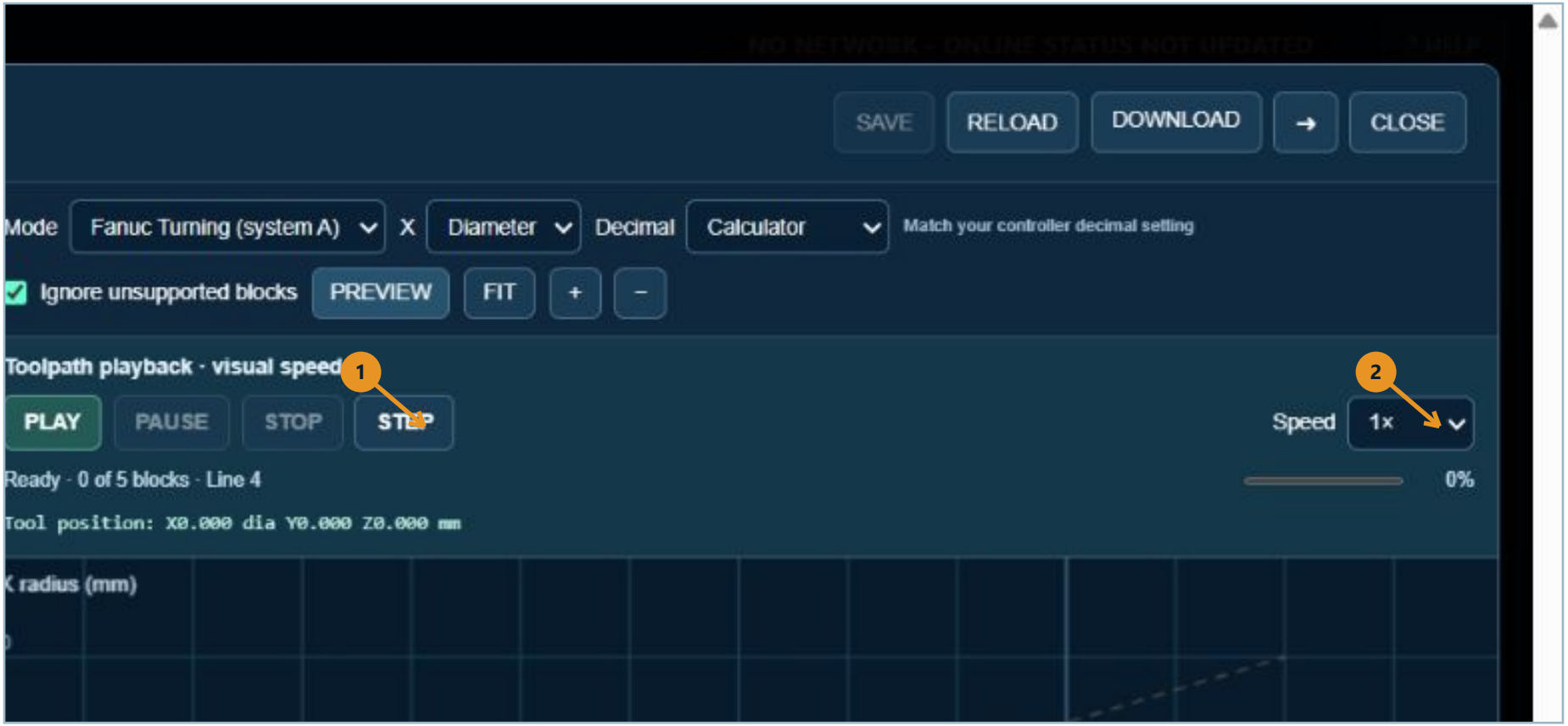
7. PAUSE
Pause playback at the current tool position.

8. STOP
Stop playback and reset to its starting position.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 04 • orange numbers point to the named controls



1. STEP
Advance visual playback one block at a time.

2. 0.25× 0.5× 1× 2× 5× 10×
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 05 • orange numbers point to the named controls

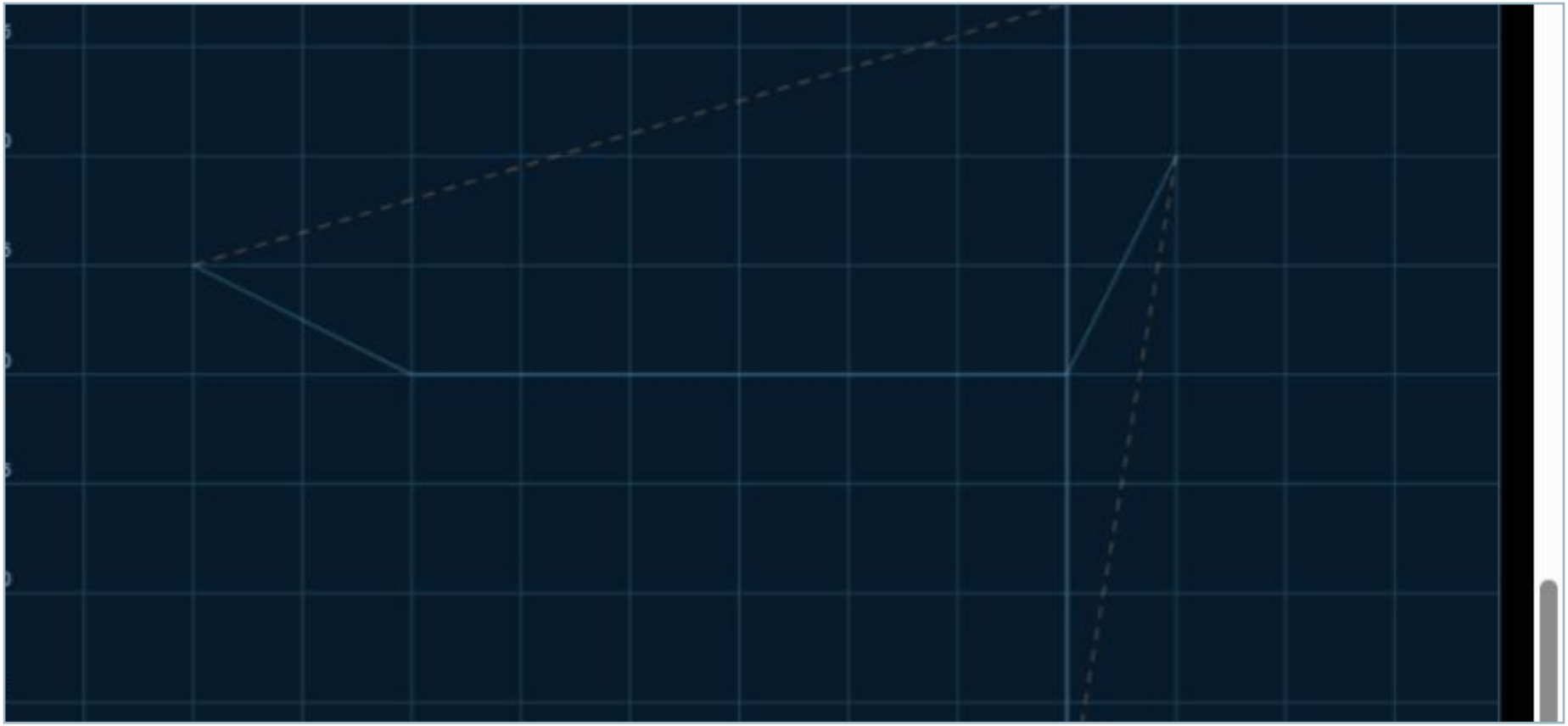


1. Fanuc NC program text
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 07 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Illustrated detail 08 • orange numbers point to the named controls



1. Preview notes (5)
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

36 Fanuc turning mode and unsupported blocks

Control reference • field meanings and dropdown choices

SAVE	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
RELOAD	Reload the saved source. Review any unsaved text before using this action.
DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
Find text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FIND NEXT	Find the next occurrence of the entered search text in the NC program.
REVERT	Discard unsaved text and return to the current saved content.
Fanuc NC program text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut	Choose the required value. Available choices: Fanuc Turning (system A); Fanuc Milling; Fanuc Wire-cut. The displayed records follow this screen's scope and account access.
Diameter Radius	Choose the required value. Available choices: Diameter; Radius. The displayed records follow this screen's scope and account access.
Calculator Standard IS-B	Choose the required value. Available choices: Calculator; Standard IS-B. The displayed records follow this screen's scope and account access.
PREVIEW	Rebuild geometry from the current program text and mode. Read unsupported/ignored-block notes.
FIT	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.

–	Change the viewer scale. This does not alter the source geometry.
PLAY	Start or resume visual toolpath playback after a valid preview.
PAUSE	Pause playback at the current tool position.
STOP	Stop playback and reset to its starting position.
STEP	Advance visual playback one block at a time.
0.25× 0.5× 1× 2× 5× 10×	Choose the required value. Available choices: 0.25×; 0.5×; 1×; 2×; 5×; 10×. The displayed records follow this screen’s scope and account access.
Preview notes (5)	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

37 Fanuc wire-cut preview

Workflow • read before using the illustrated controls

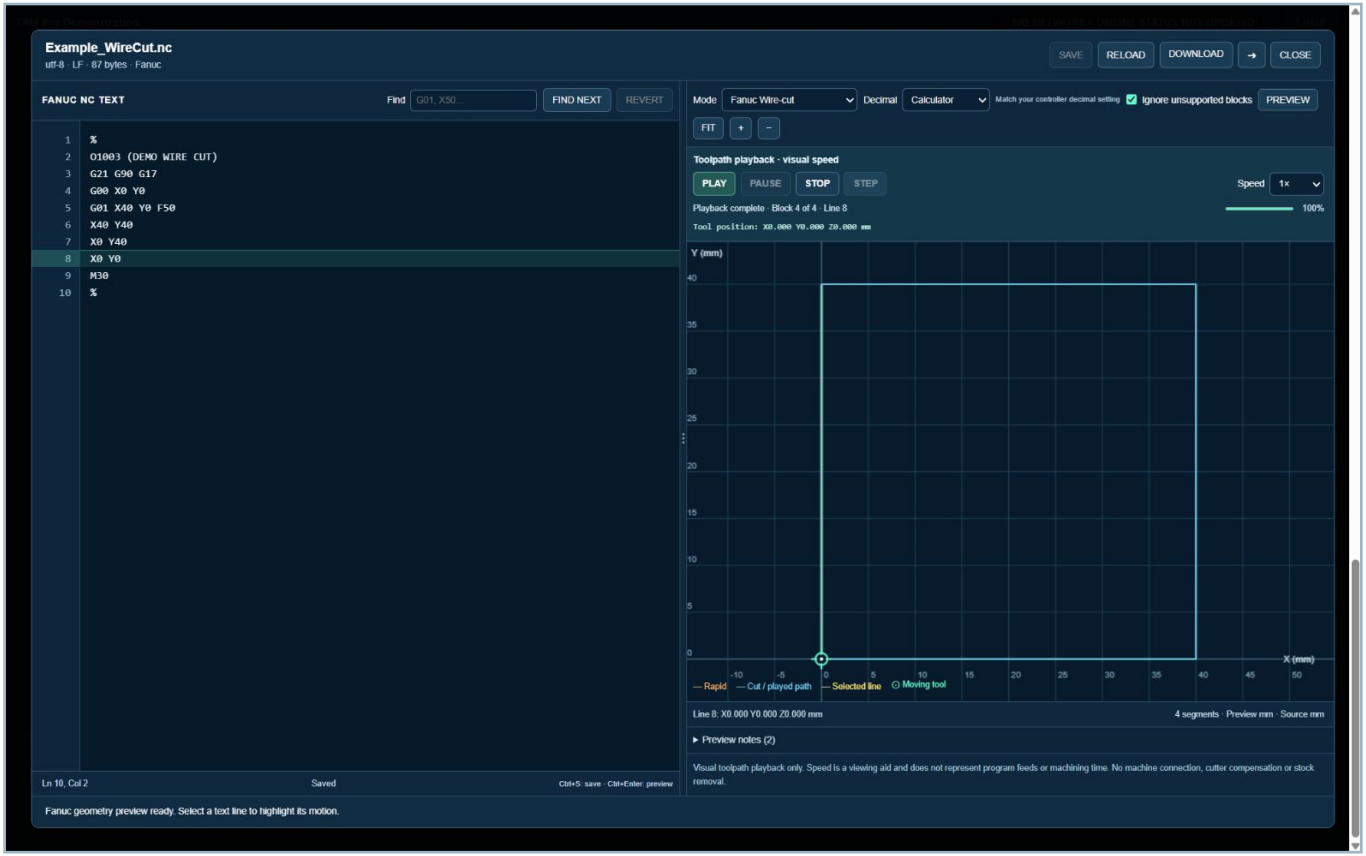
1. Choose or confirm Fanuc Wire-cut mode for the 2D path.
2. Rebuild PREVIEW after text changes. Use FIT, pan and zoom to inspect the path.
3. Review rapid/cut segments, selected-line highlight and preview notes before playback.

Practical notes

Mode detection is a convenience. Confirm the mode when program intent is ambiguous. Wire-cut preview shows geometry rather than full machine-specific technology, compensation or cutting behavior.

37 Fanuc wire-cut preview

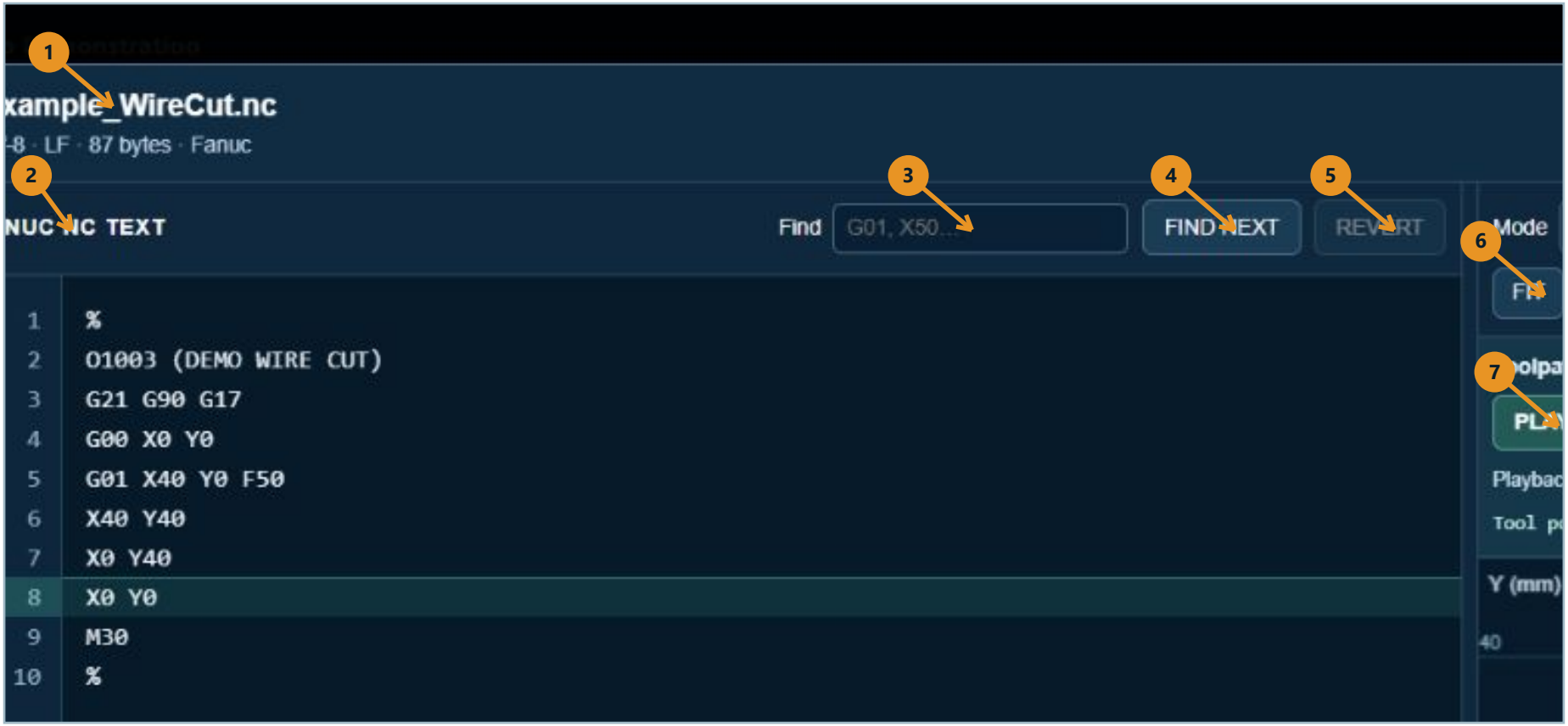
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 01 • orange numbers point to the named controls



1. Example_WireCut.nc
Read this section heading before using the controls below it.

2. FANUC NC TEXT
Read this section heading before using the controls below it.

3. Find text
Enter or review this value as labeled

4. FIND NEXT
Find the next occurrence of the entered search text in the NC program.

5. REVERT
Discard unsaved text and return to the current saved content.

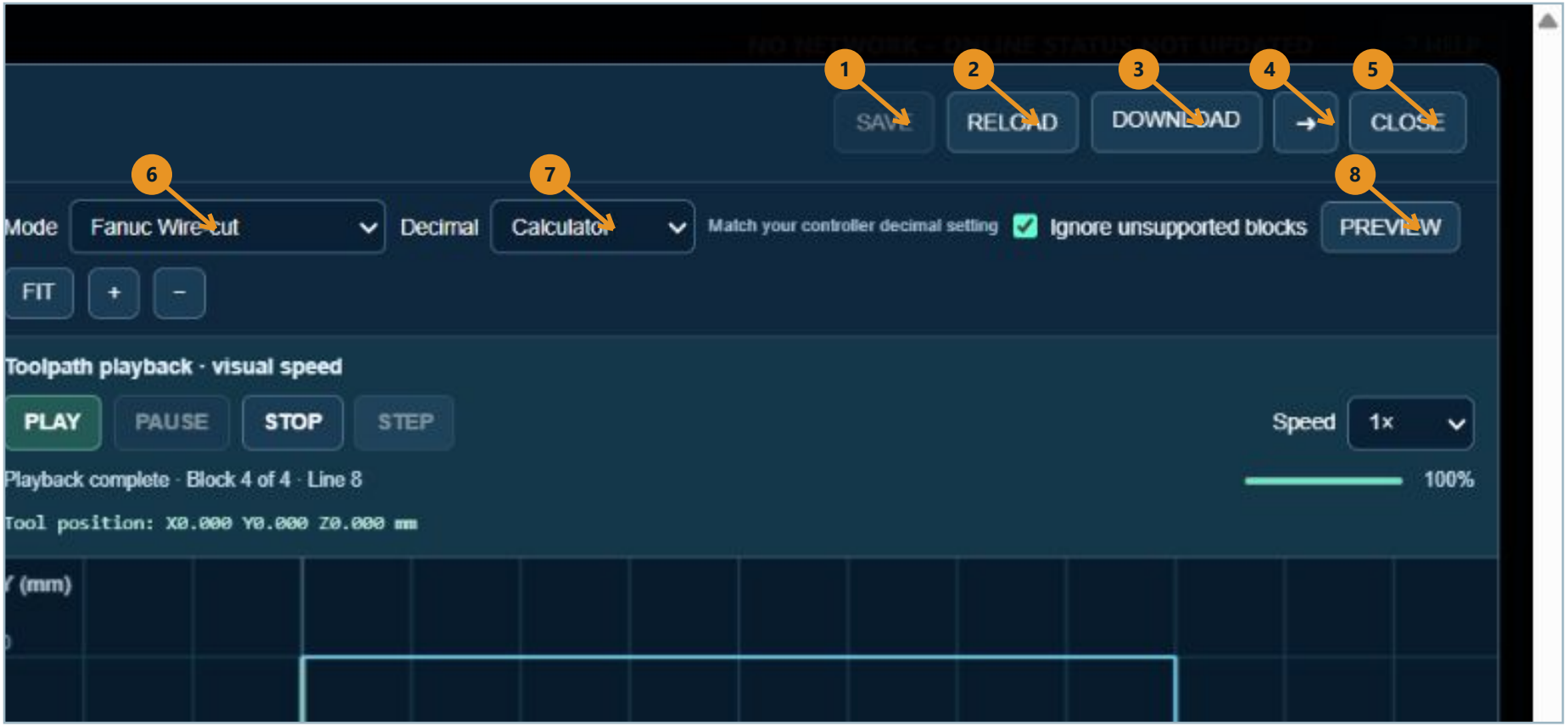
6. FIT
Fit the complete drawing or path to the available viewer area.

7. PLAY
Start or resume visual toolpath playback after a valid preview.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 02 • orange numbers point to the named controls



1. SAVE
Commit the reviewed fields for this form

2. RELOAD
Reload the saved source

3. DOWNLOAD
Save a separate copy of the file

4. □
Use this named action/tab for the workflow described in this chapter

5. CLOSE
Close this viewer/dialog and return to the underlying application screen.

6. Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut
Choose the required value

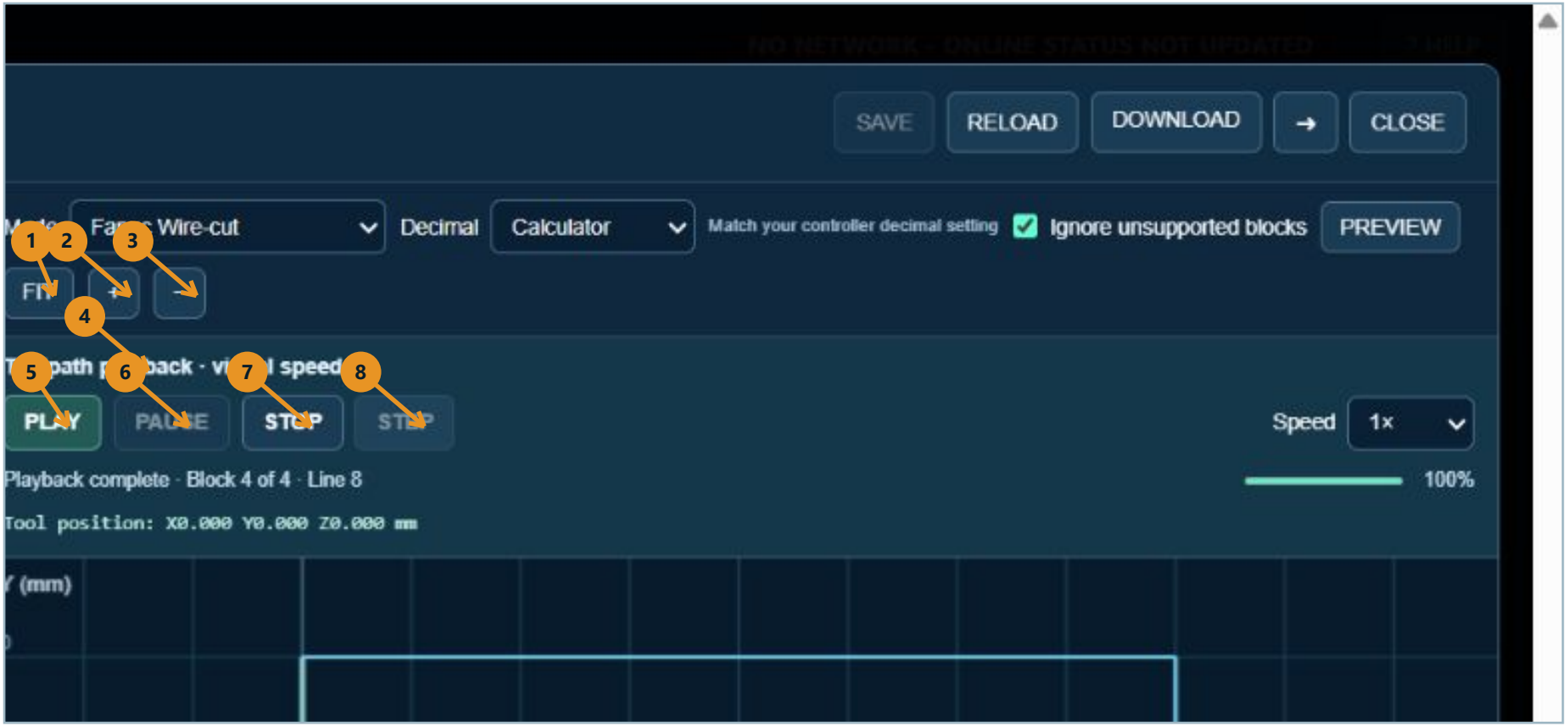
7. Calculator Standard IS-B
Choose the required value

8. PREVIEW
Rebuild geometry from the current program text and mode

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 03 • orange numbers point to the named controls



1. FIT
Fit the complete drawing or path to the available viewer area.

2. +
Change the viewer scale

3. –
Change the viewer scale

4. Toolpath playback · visual speed
Read this section heading before using the controls below it.

5. PLAY
Start or resume visual toolpath playback after a valid preview.

6. PAUSE
Pause playback at the current tool position.

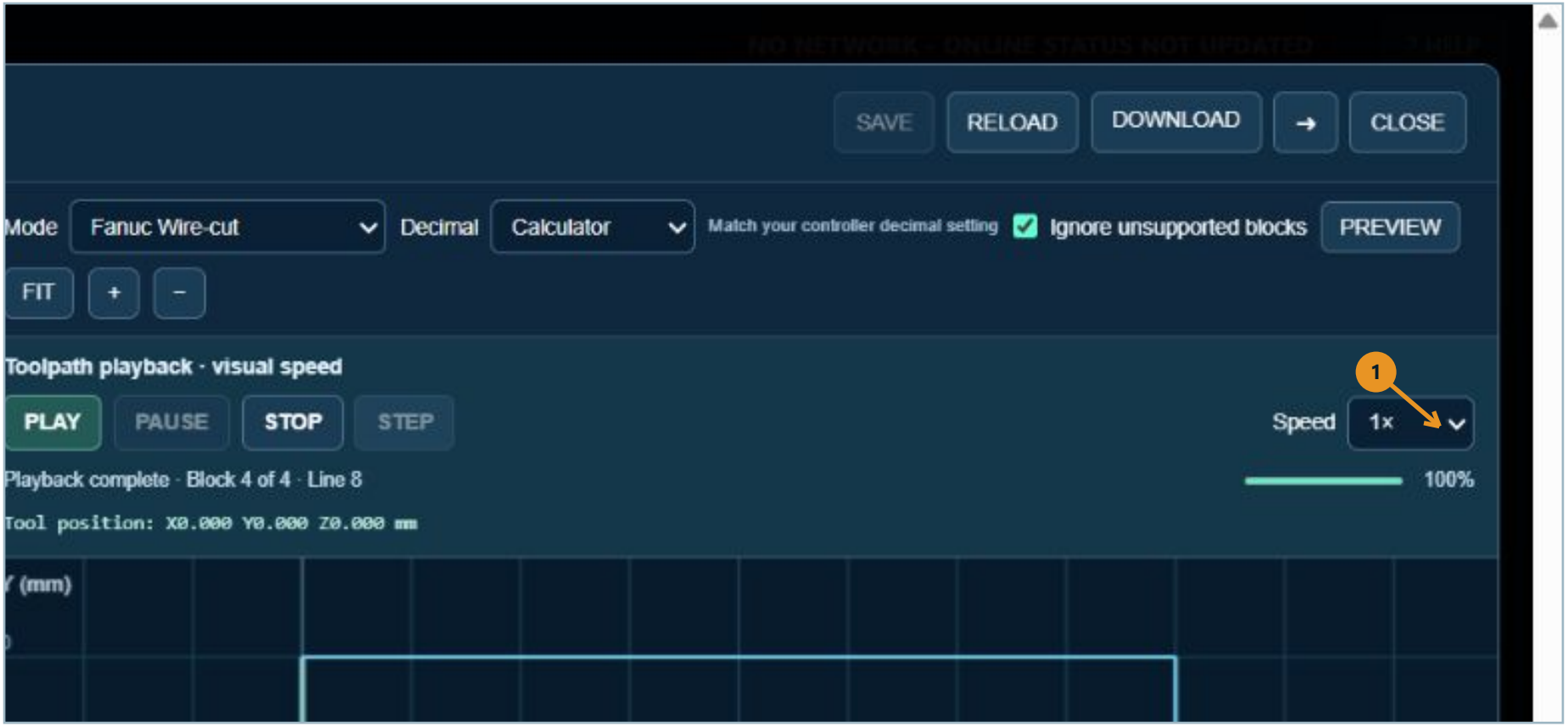
7. STOP
Stop playback and reset to its starting position.

8. STEP
Advance visual playback one block at a time.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 04 • orange numbers point to the named controls



1. 0.25× 0.5× 1× 2× 5× 10×
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 05 • orange numbers point to the named controls



1. Fanuc NC program text
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 07 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Illustrated detail 08 • orange numbers point to the named controls



1. Preview notes (2)
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

37 Fanuc wire-cut preview

Control reference • field meanings and dropdown choices

SAVE	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
RELOAD	Reload the saved source. Review any unsaved text before using this action.
DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
Find text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FIND NEXT	Find the next occurrence of the entered search text in the NC program.
REVERT	Discard unsaved text and return to the current saved content.
Fanuc NC program text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut	Choose the required value. Available choices: Fanuc Turning (system A); Fanuc Milling; Fanuc Wire-cut. The displayed records follow this screen's scope and account access.
Calculator Standard IS-B	Choose the required value. Available choices: Calculator; Standard IS-B. The displayed records follow this screen's scope and account access.
PREVIEW	Rebuild geometry from the current program text and mode. Read unsupported/ignored-block notes.
FIT	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.
−	Change the viewer scale. This does not alter the source geometry.

PLAY	Start or resume visual toolpath playback after a valid preview.
PAUSE	Pause playback at the current tool position.
STOP	Stop playback and reset to its starting position.
STEP	Advance visual playback one block at a time.
0.25× 0.5× 1× 2× 5× 10×	Choose the required value. Available choices: 0.25×; 0.5×; 1×; 2×; 5×; 10×. The displayed records follow this screen’s scope and account access.
Preview notes (2)	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

38 Toolpath playback: play, pause, stop, step and speed

Workflow • read before using the illustrated controls

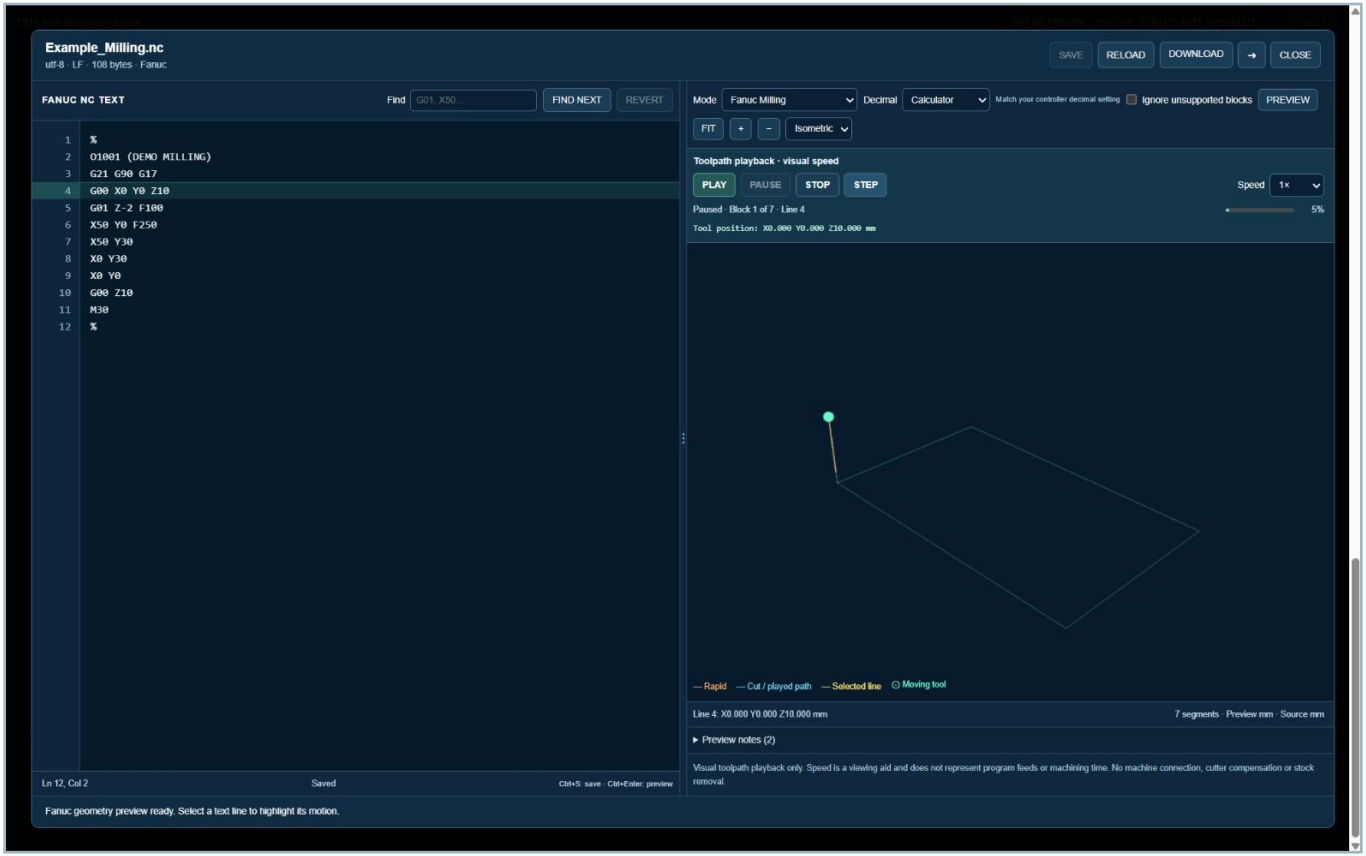
1. Build a valid PREVIEW so playback controls are enabled.
2. PLAY advances the moving-tool marker. PAUSE holds the current position; PLAY continues.
3. STOP resets the playback. STEP advances one block at a time.
4. Choose visual Speed from 0.25× through 10×. Watch the progress, current line and tool position.
5. Use the program text to inspect a highlighted motion. Review notes and rebuild the preview after changes.

Practical notes

Playback speed is only a viewing aid, not cutting feed or machining time. There is no machine connection, stock removal or full cutter compensation simulation. Do not transfer a program to a machine on the basis of this visual preview alone.

38 Toolpath playback: play, pause, stop, step and speed

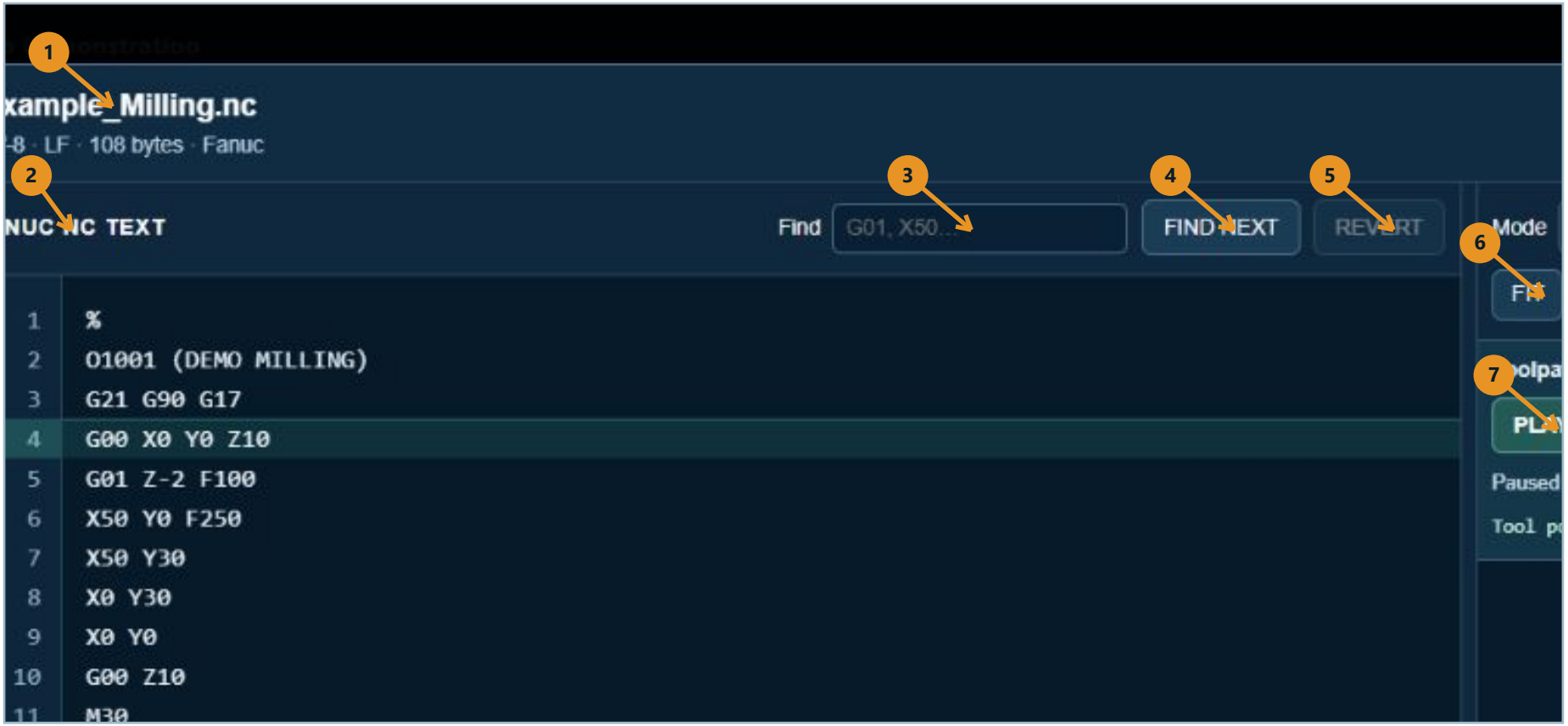
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 01 • orange numbers point to the named controls



1. Example_Milling.nc
Read this section heading before using the controls below it.

2. FANUC NC TEXT
Read this section heading before using the controls below it.

3. Find text
Enter or review this value as labeled

4. FIND NEXT
Find the next occurrence of the entered search text in the NC program.

5. REVERT
Discard unsaved text and return to the current saved content.

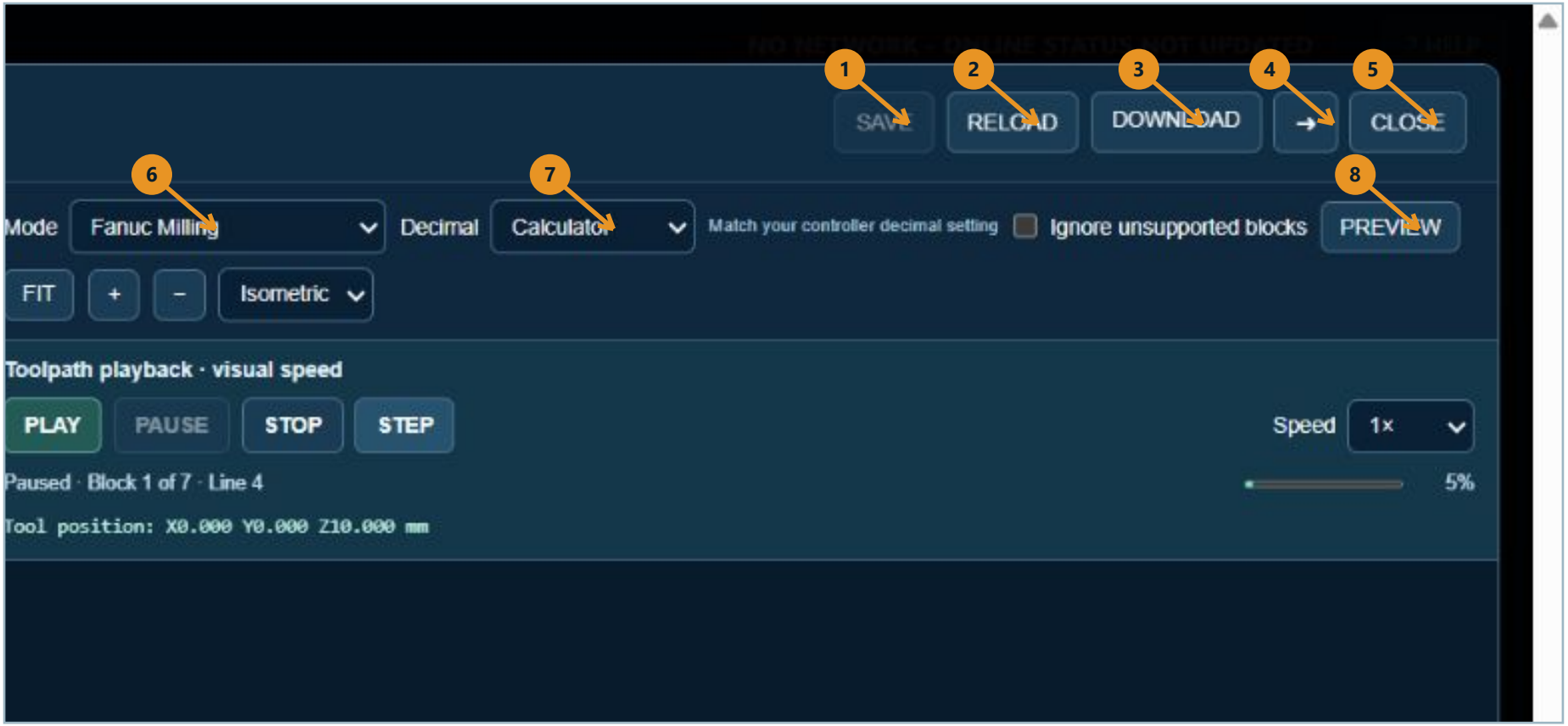
6. FIT
Fit the complete drawing or path to the available viewer area.

7. PLAY
Start or resume visual toolpath playback after a valid preview.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 02 • orange numbers point to the named controls



1. SAVE
Commit the reviewed fields for this form

2. RELOAD
Reload the saved source

3. DOWNLOAD
Save a separate copy of the file

4. □
Use this named action/tab for the workflow described in this chapter

5. CLOSE
Close this viewer/dialog and return to the underlying application screen.

6. Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut
Choose the required value

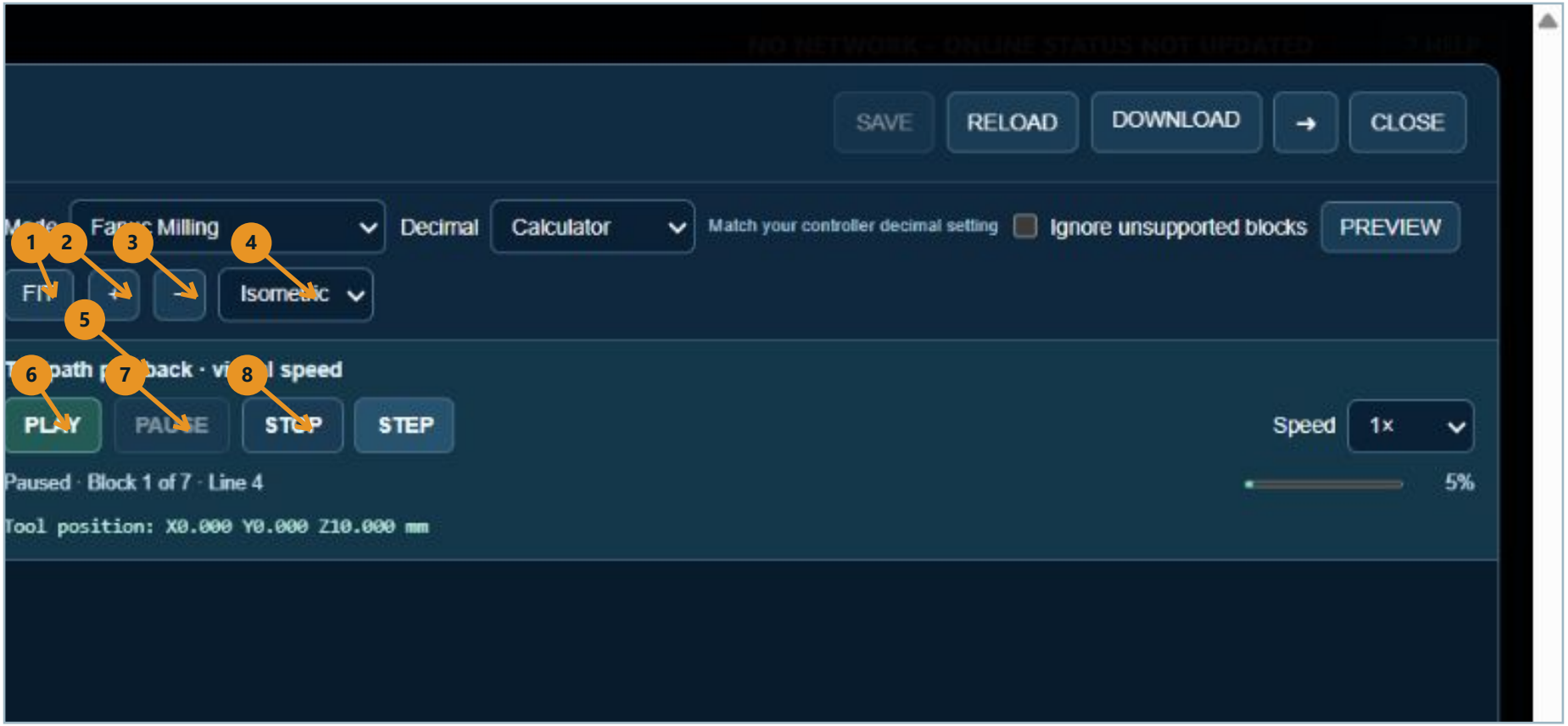
7. Calculator Standard IS-B
Choose the required value

8. PREVIEW
Rebuild geometry from the current program text and mode

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 03 • orange numbers point to the named controls



1. FIT
Fit the complete drawing or path to the available viewer area.

2. +
Change the viewer scale

3. –
Change the viewer scale

4. Isometric Front Top
Choose the required value

5. Toolpath playback · visual speed
Read this section heading before using the controls below it.

6. PLAY
Start or resume visual toolpath playback after a valid preview.

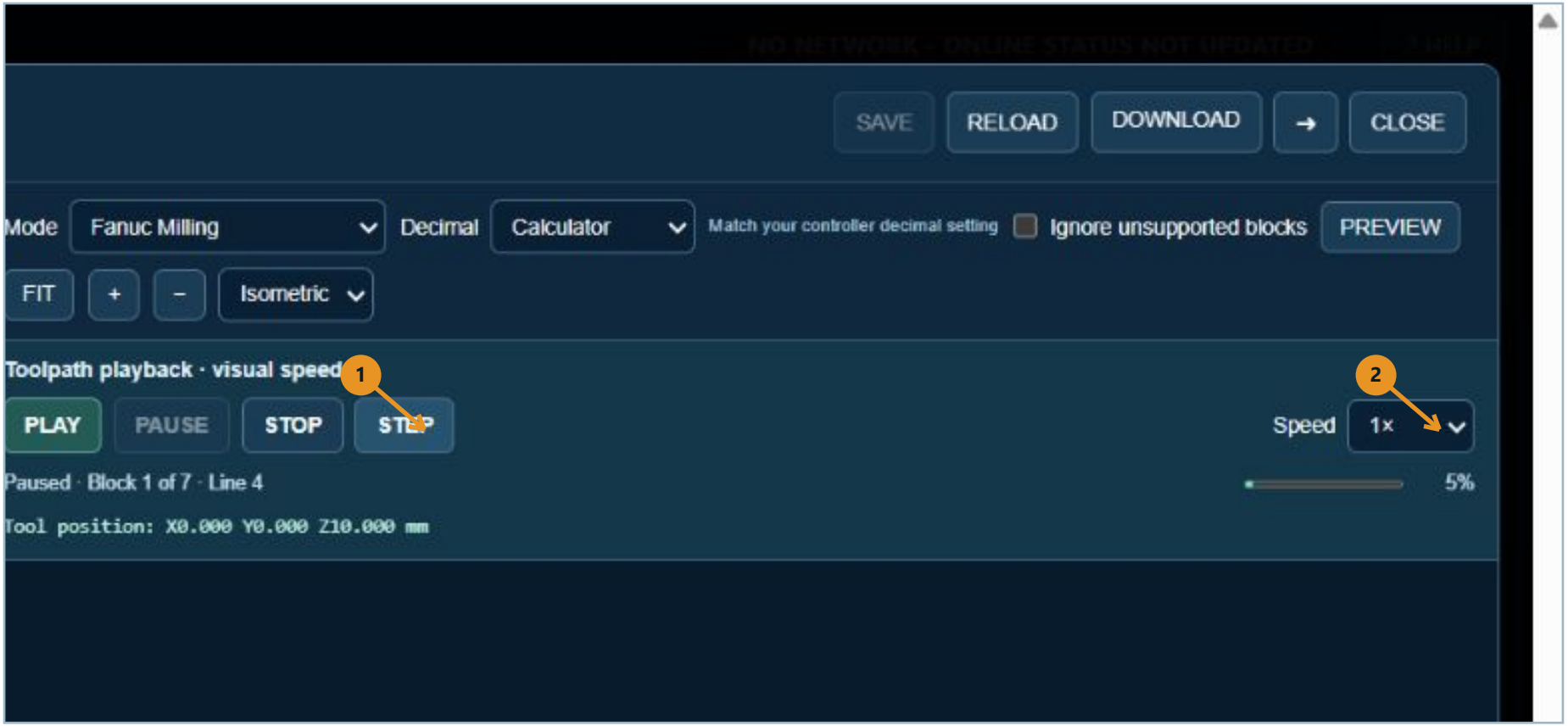
7. PAUSE
Pause playback at the current tool position.

8. STOP
Stop playback and reset to its starting position.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 04 • orange numbers point to the named controls



1. STEP
Advance visual playback one block at a time.

2. 0.25× 0.5× 1× 2× 5× 10×
Choose the required value

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 05 • orange numbers point to the named controls



1. Fanuc NC program text
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 06 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 07 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Illustrated detail 08 • orange numbers point to the named controls



1. Preview notes (2)
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

38 Toolpath playback: play, pause, stop, step and speed

Control reference • field meanings and dropdown choices

SAVE	Commit the reviewed fields for this form. Check identity, date and quantities before submitting; review the resulting saved record.
RELOAD	Reload the saved source. Review any unsaved text before using this action.
DOWNLOAD	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
□	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
CLOSE	Close this viewer/dialog and return to the underlying application screen.
Find text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
FIND NEXT	Find the next occurrence of the entered search text in the NC program.
REVERT	Discard unsaved text and return to the current saved content.
Fanuc NC program text	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Fanuc Turning (system A) Fanuc Milling Fanuc Wire-cut	Choose the required value. Available choices: Fanuc Turning (system A); Fanuc Milling; Fanuc Wire-cut. The displayed records follow this screen's scope and account access.
Calculator Standard IS-B	Choose the required value. Available choices: Calculator; Standard IS-B. The displayed records follow this screen's scope and account access.
PREVIEW	Rebuild geometry from the current program text and mode. Read unsupported/ignored-block notes.
FIT	Fit the complete drawing or path to the available viewer area.
+	Change the viewer scale. This does not alter the source geometry.
−	Change the viewer scale. This does not alter the source geometry.

38 Toolpath playback: play, pause, stop, step and speed

Control reference continued

Isometric Front Top	Choose the required value. Available choices: Isometric; Front; Top. The displayed records follow this screen’s scope and account access.
PLAY	Start or resume visual toolpath playback after a valid preview.
PAUSE	Pause playback at the current tool position.
STOP	Stop playback and reset to its starting position.
STEP	Advance visual playback one block at a time.
0.25× 0.5× 1× 2× 5× 10×	Choose the required value. Available choices: 0.25×; 0.5×; 1×; 2×; 5×; 10×. The displayed records follow this screen’s scope and account access.
Preview notes (2)	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.

39 Expanded dashboard review

Workflow • read before using the illustrated controls

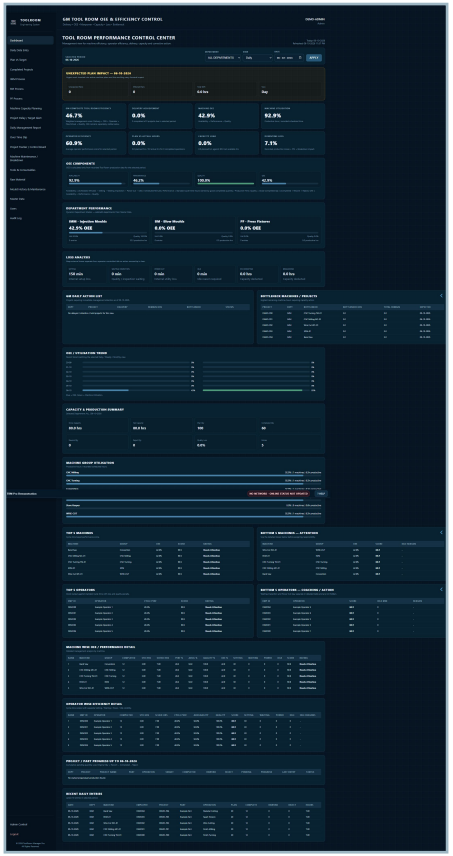
1. Click the arrow in the top-right corner of a minimized dashboard section.
2. Review the bottleneck, bottom-machine and bottom-operator table with its loss reasons.
3. Click the same corner arrow to minimize the section again.

Practical notes

A section arrow changes only its own panel. Use the selected period and department to understand the table scope.

39 Expanded dashboard review

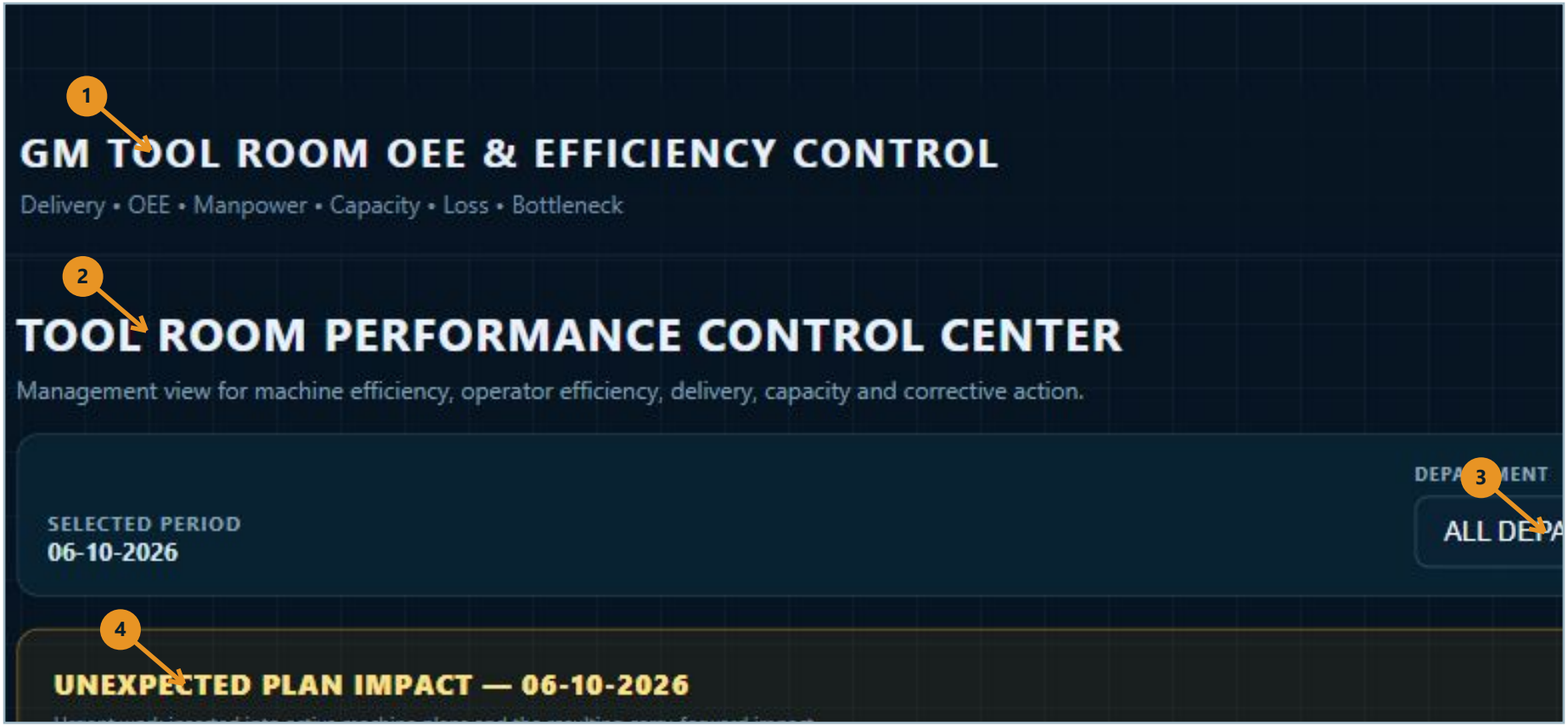
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 01 • orange numbers point to the named controls



1. GM TOOL ROOM OEE & EFFICIENCY CONTROL
Enter or review this value as labeled

2. TOOL ROOM PERFORMANCE CONTROL CENTER
Read this section heading before using the controls below it.

3. Department
Choose the required value

4. UNEXPECTED PLAN IMPACT — 06-10-2026
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 02 • orange numbers point to the named controls

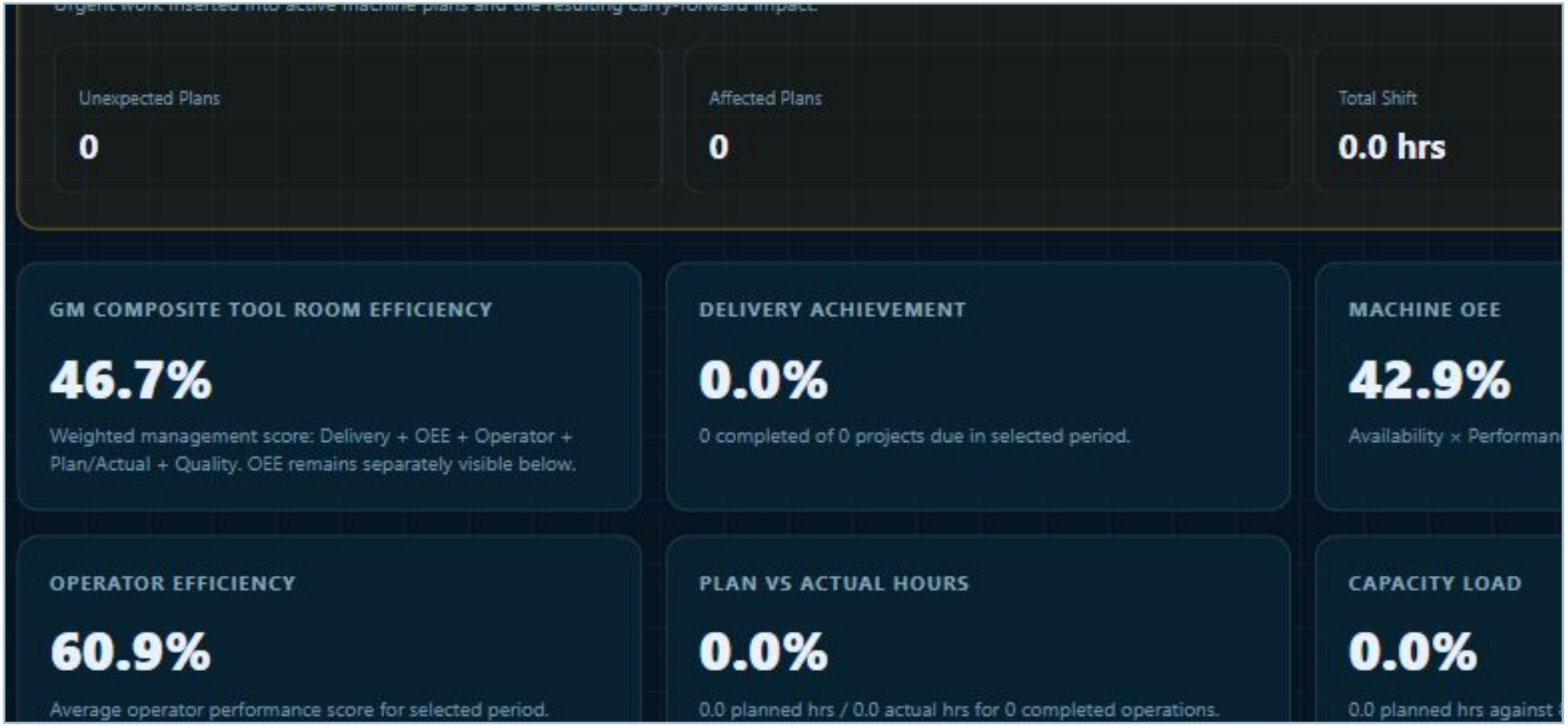


1. APPLY
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

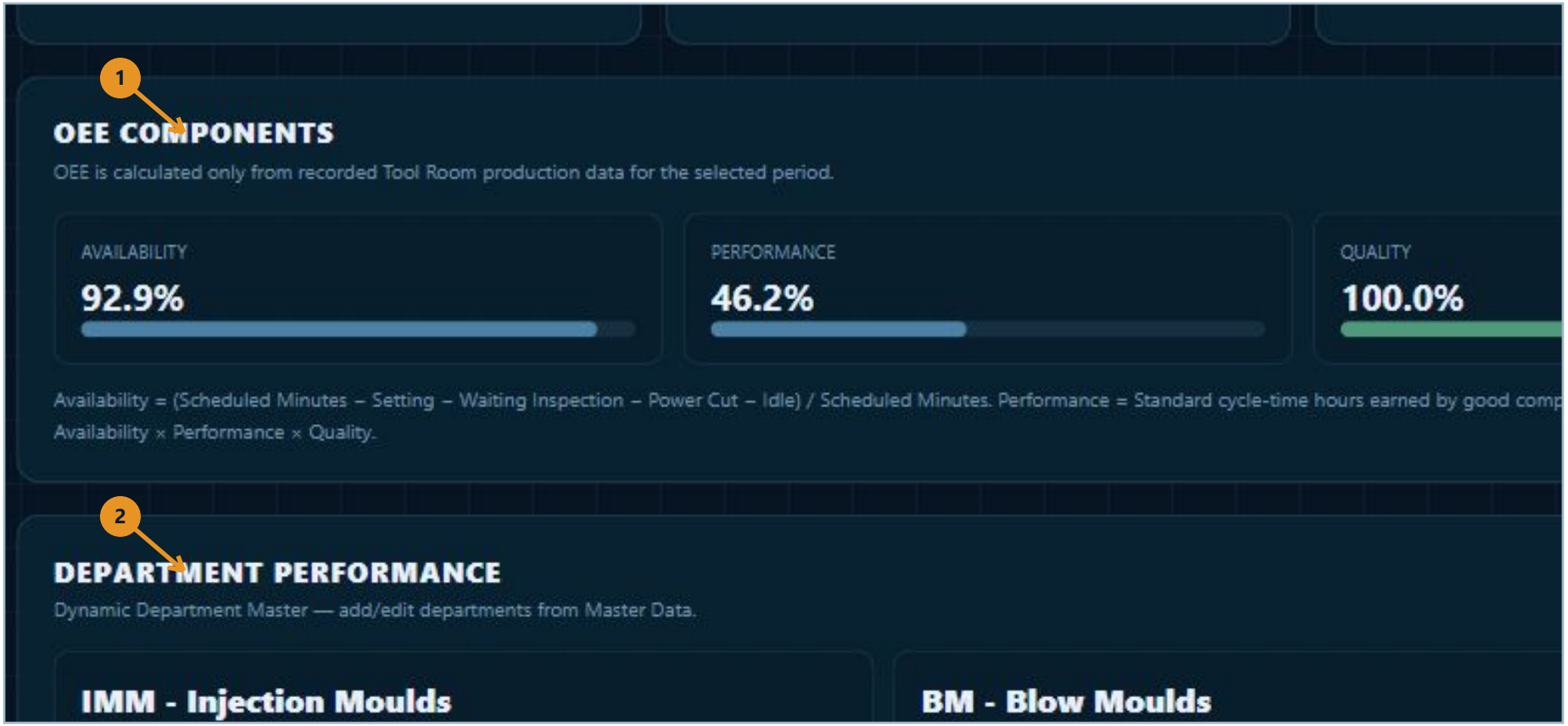
Illustrated detail 03 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 04 • orange numbers point to the named controls



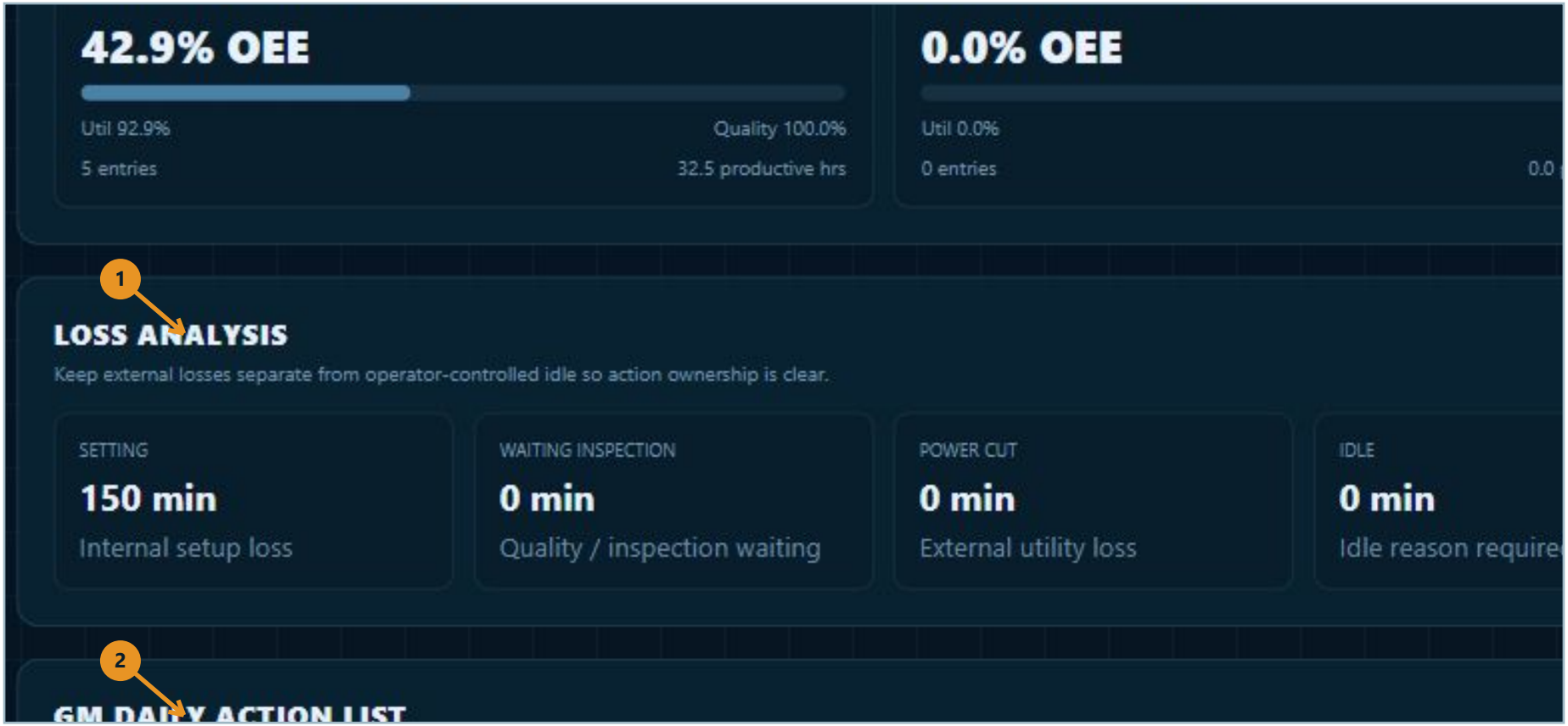
1. OEE COMPONENTS
Enter or review this value as labeled

2. DEPARTMENT PERFORMANCE
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 05 • orange numbers point to the named controls



1. LOSS ANALYSIS
Enter or review this value as labeled

2. GM DAILY ACTION LIST
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 06 • orange numbers point to the named controls

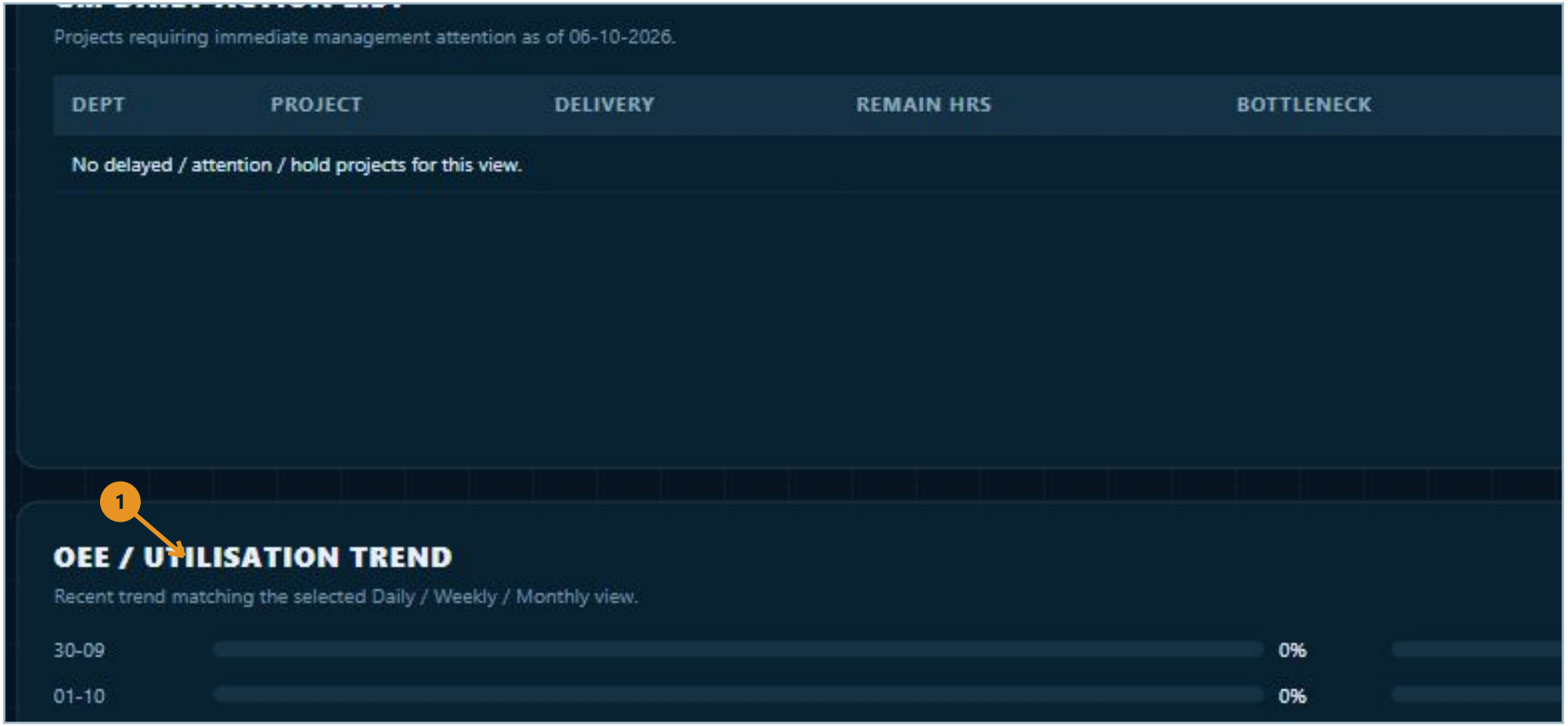


1. Fold section
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 07 • orange numbers point to the named controls

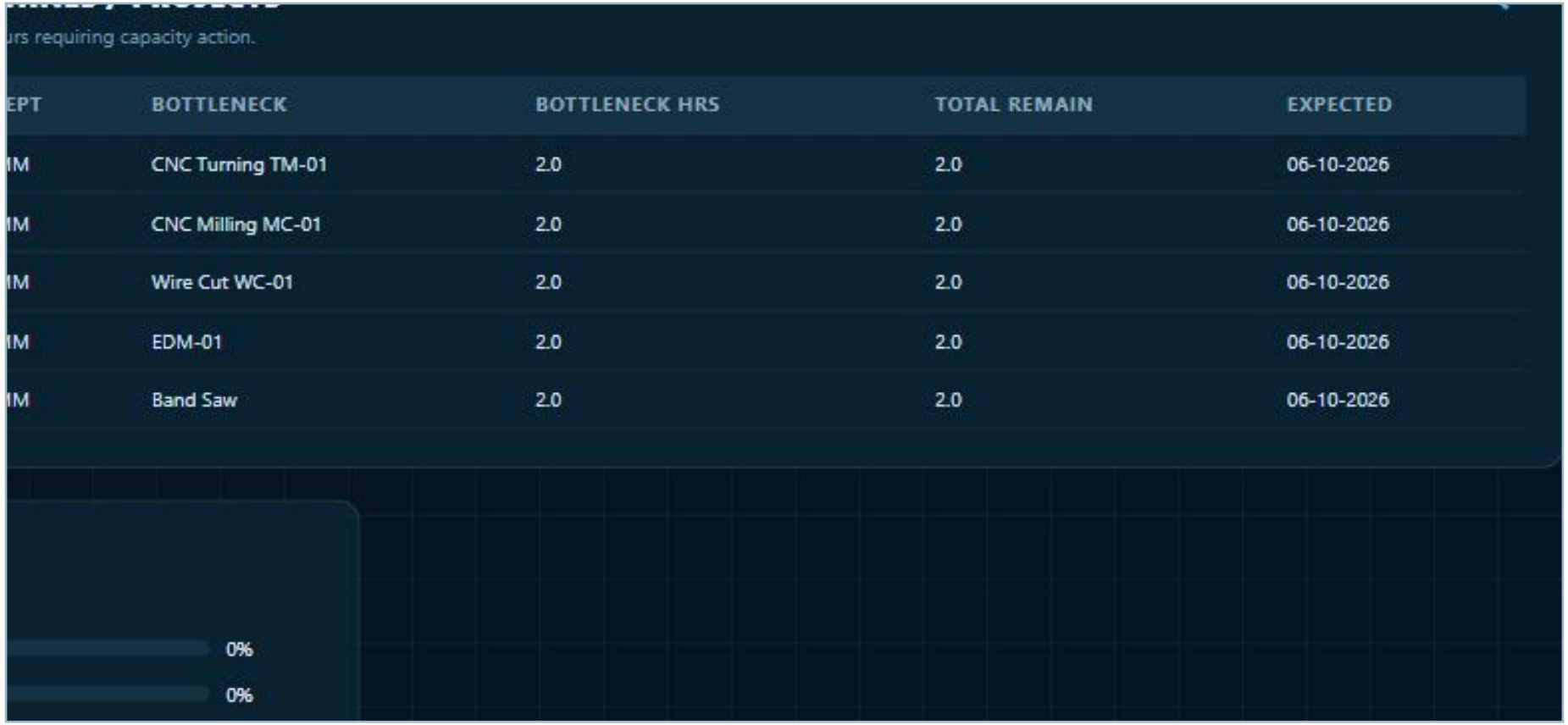


1. OEE / UTILISATION TREND
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 08 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 09 • orange numbers point to the named controls

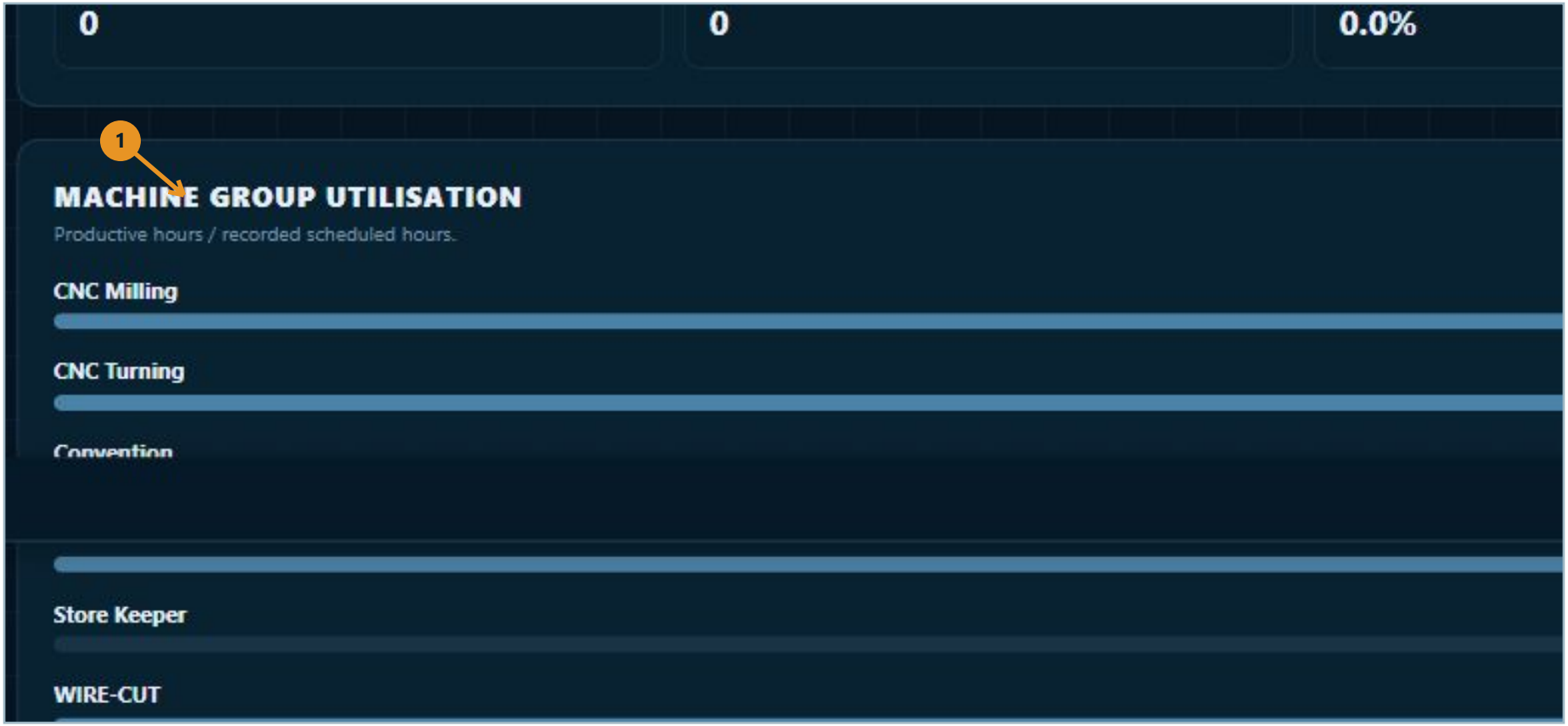


1. CAPACITY & PRODUCTION SUMMARY
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 10 • orange numbers point to the named controls



1. MACHINE GROUP UTILISATION
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 11 • orange numbers point to the named controls



1. Help - User Manual
Open the bundled PDF manual in TRM Pro

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 12 • orange numbers point to the named controls

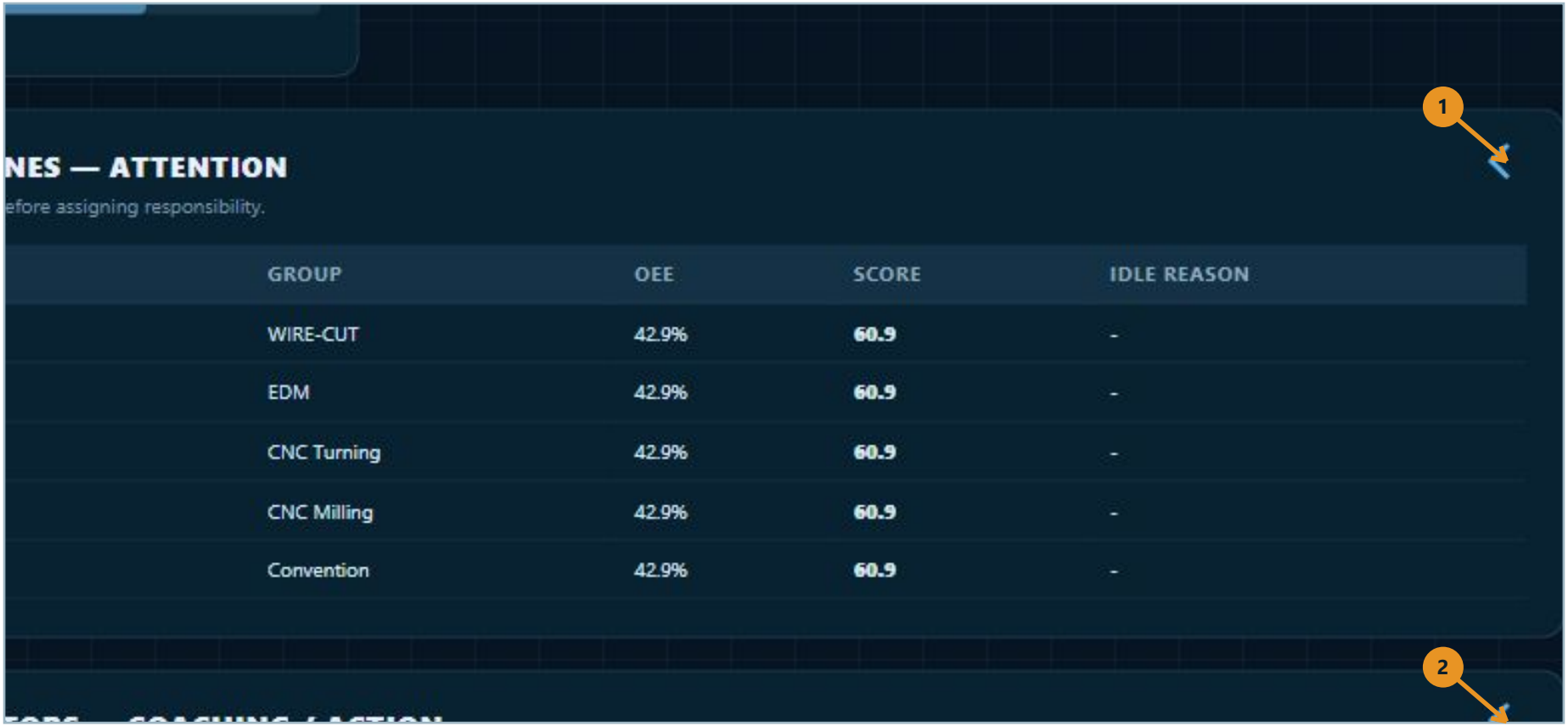


1. TOP 5 MACHINES
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 13 • orange numbers point to the named controls



1. Fold section
Use this named action/tab for the workflow described in this chapter

2. Fold section
Use this named action/tab for the workflow described in this chapter

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 14 • orange numbers point to the named controls



1. TOP 5 OPERATORS
Enter or review this value as labeled

2. MACHINE WISE OEE / PERFORMANCE DETAIL
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

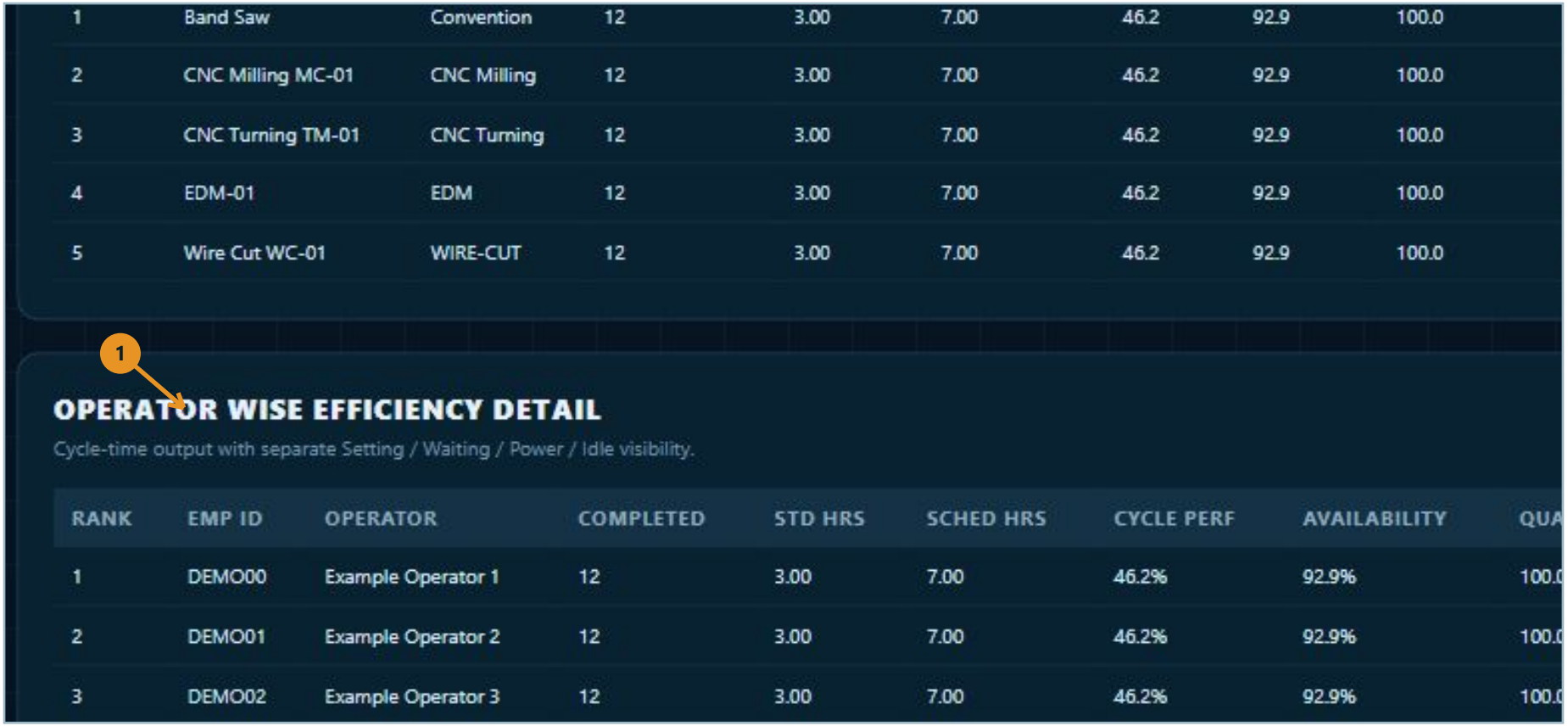
Illustrated detail 15 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 16 • orange numbers point to the named controls



1. OPERATOR WISE EFFICIENCY DETAIL
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

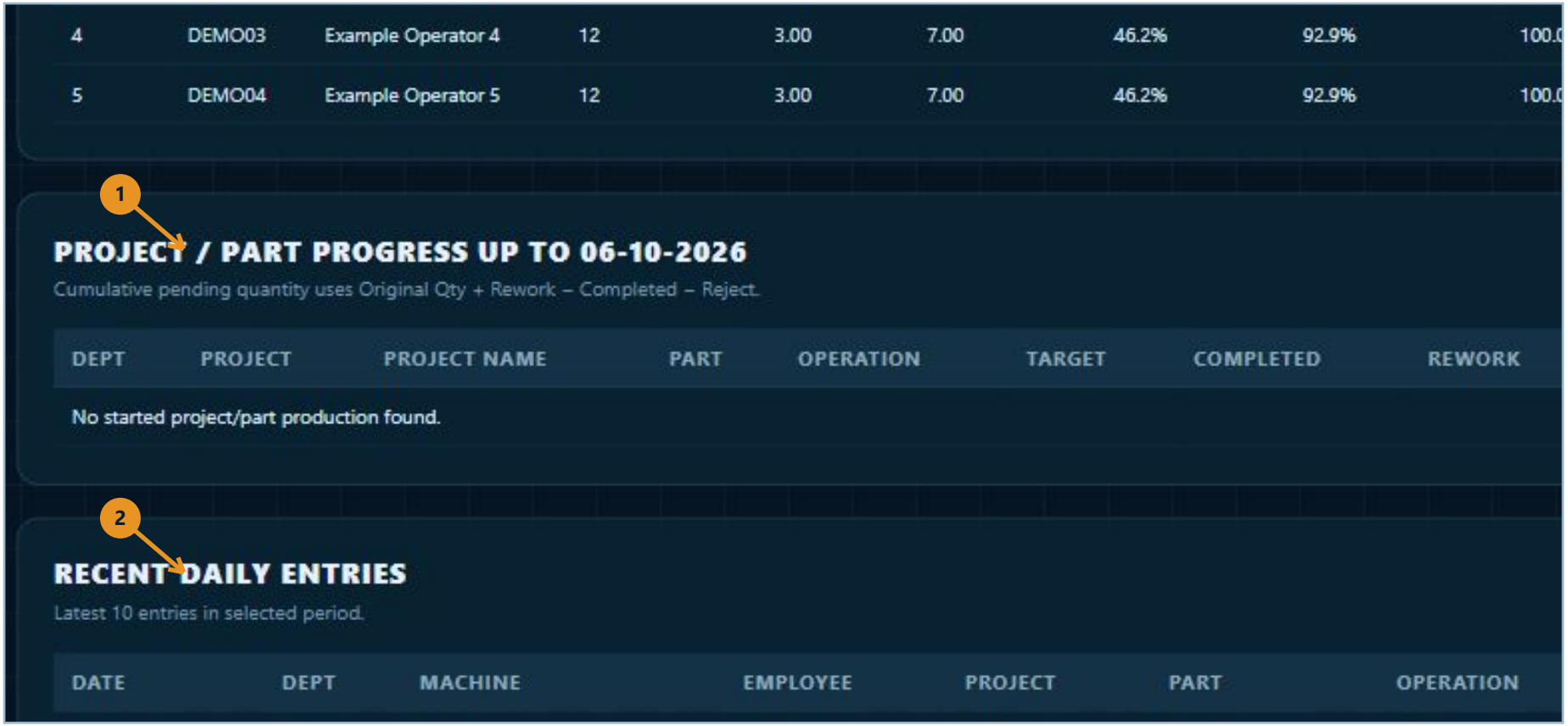
Illustrated detail 17 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 18 • orange numbers point to the named controls



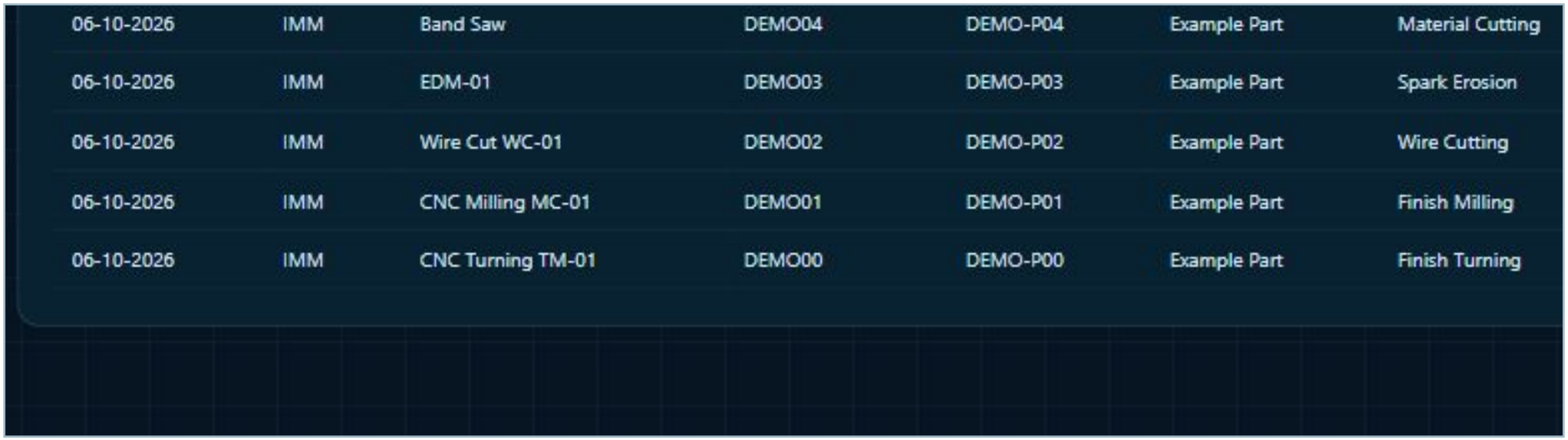
1. PROJECT / PART PROGRESS UP TO 06-10-2026
Enter or review this value as labeled

2. RECENT DAILY ENTRIES
Enter or review this value as labeled

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Illustrated detail 19 • orange numbers point to the named controls



06-10-2026	IMM	Band Saw	DEMO04	DEMO-P04	Example Part	Material Cutting
06-10-2026	IMM	EDM-01	DEMO03	DEMO-P03	Example Part	Spark Erosion
06-10-2026	IMM	Wire Cut WC-01	DEMO02	DEMO-P02	Example Part	Wire Cutting
06-10-2026	IMM	CNC Milling MC-01	DEMO01	DEMO-P01	Example Part	Finish Milling
06-10-2026	IMM	CNC Turning TM-01	DEMO00	DEMO-P00	Example Part	Finish Turning

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

39 Expanded dashboard review

Control reference • field meanings and dropdown choices

Help - User Manual	Open the bundled PDF manual in TRM Pro. Use page navigation and Download PDF; Close returns to this screen.
GM TOOL ROOM OEE & EFFICIENCY CONTROL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Department	Choose the required value. Available choices: ALL DEPARTMENTS; IMM - Injection Moulds; BM - Blow Moulds; PF - Press Fixtures. The displayed records follow this screen's scope and account access.
Period	Choose the required value. Available choices: Daily; Weekly; Monthly. The displayed records follow this screen's scope and account access.
DATE	Select the actual reference date/time for this record or report. Check overnight intervals and the period before submitting.
APPLY	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
UNEXPECTED PLAN IMPACT — 06-10-2026	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
OEE COMPONENTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
DEPARTMENT PERFORMANCE	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
LOSS ANALYSIS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
GM DAILY ACTION LIST	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTLENECK MACHINES / PROJECTS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
Fold section	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
OEE / UTILISATION TREND	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
CAPACITY & PRODUCTION SUMMARY	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

MACHINE GROUP UTILISATION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
TOP 5 MACHINES	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTOM 5 MACHINES — ATTENTION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
TOP 5 OPERATORS	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
BOTTOM 5 OPERATORS — COACHING / ACTION	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
MACHINE WISE OEE / PERFORMANCE DETAIL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
OPERATOR WISE EFFICIENCY DETAIL	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
PROJECT / PART PROGRESS UP TO 06-10-2026	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.
RECENT DAILY ENTRIES	Enter or review this value as labeled. Related names and calculated fields may populate from the selected master record.

40 Help: open the manual inside TRM Pro

Workflow • read before using the illustrated controls

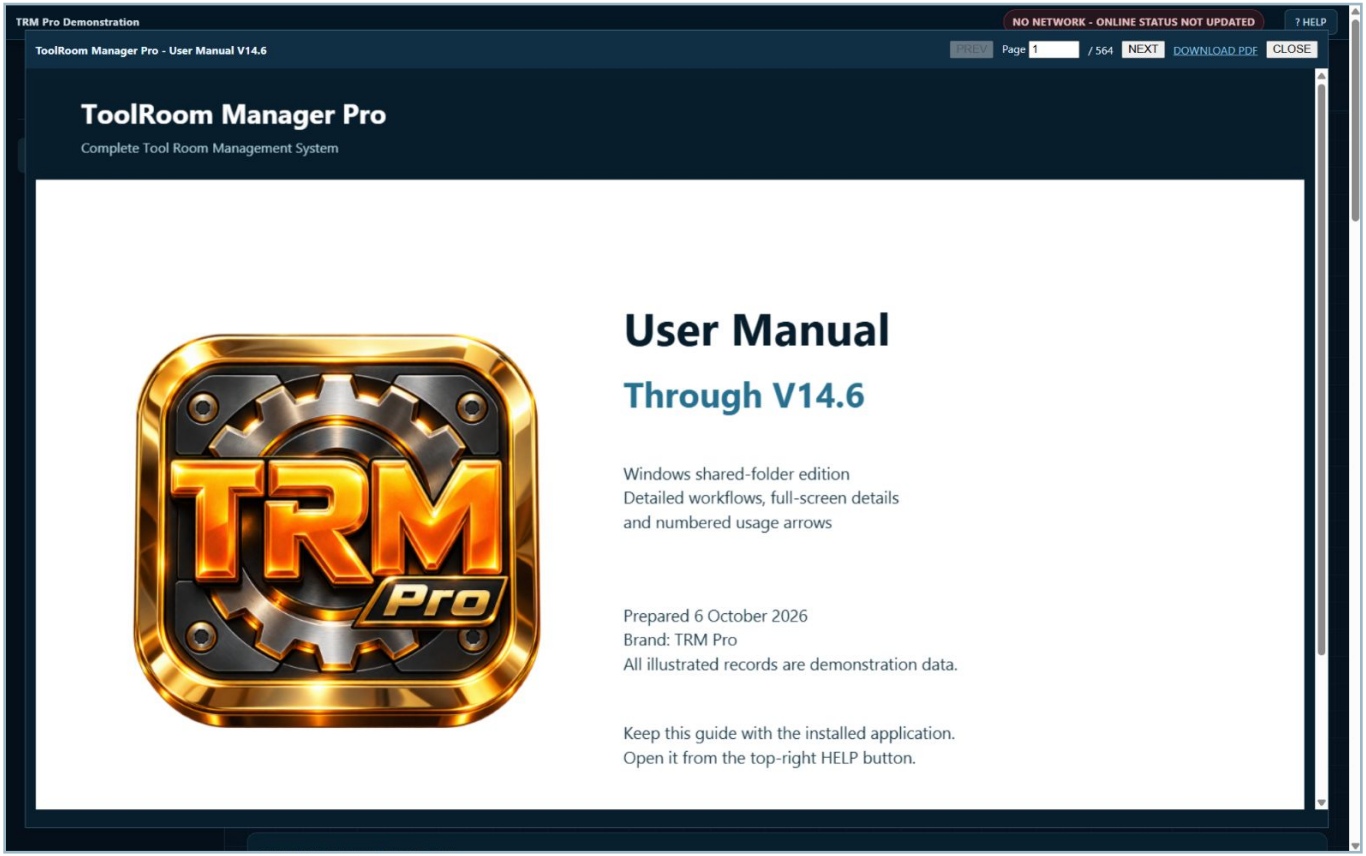
1. Click ? HELP at the top-right corner of the application. The manual opens inside the application.
2. Use NEXT and PREV to move through pages. Enter a valid page number and press Enter to jump directly.
3. DOWNLOAD PDF saves a separate manual copy. CLOSE returns to the same application window and preserves the form beneath it.

Practical notes

The PDF is included with the installer and Help update. Internet access is not needed to read it. Screenshots of this viewer were captured during verification; the final page count may differ from the draft pictured.

40 Help: open the manual inside TRM Pro

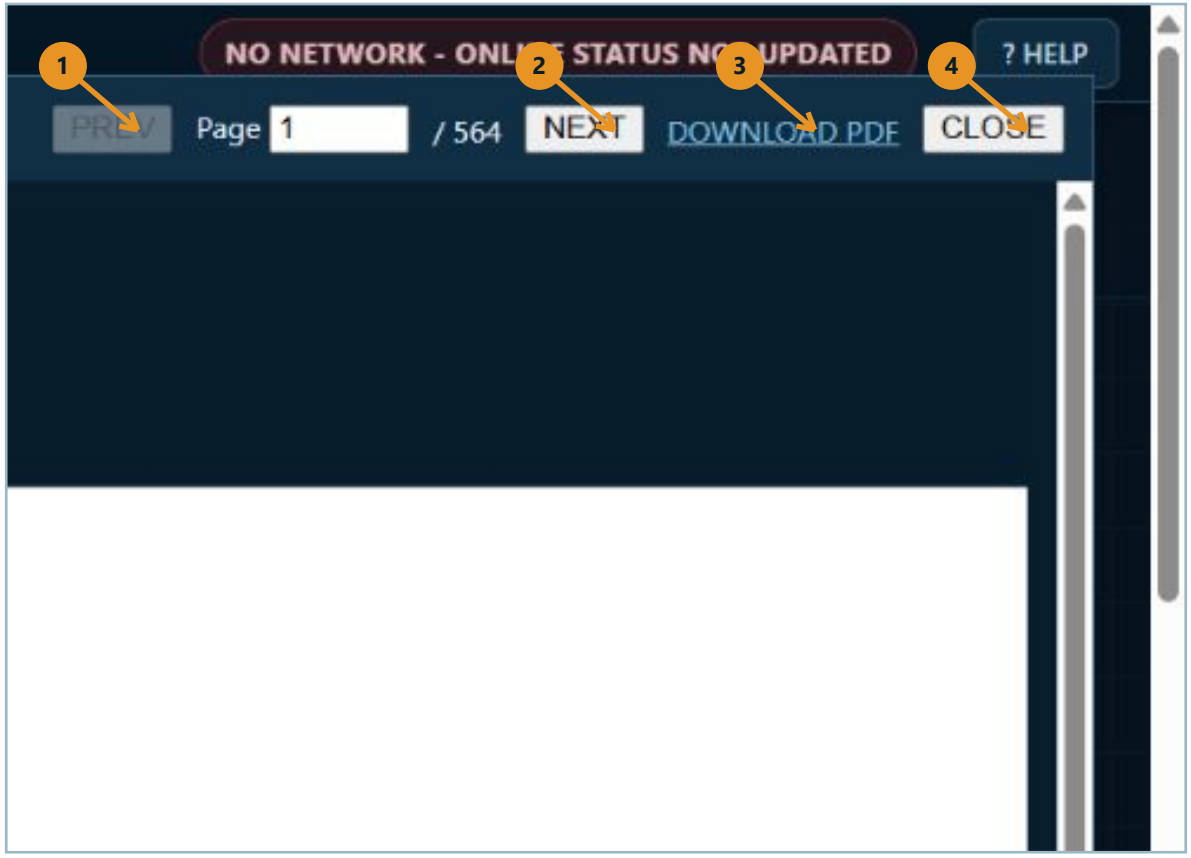
Illustrated detail screen overview • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

40 Help: open the manual inside TRM Pro

Illustrated detail 01 • orange numbers point to the named controls



1. PREV
Use this named action/tab for the workflow described in this chapter

2. NEXT
Use this named action/tab for the workflow described in this chapter

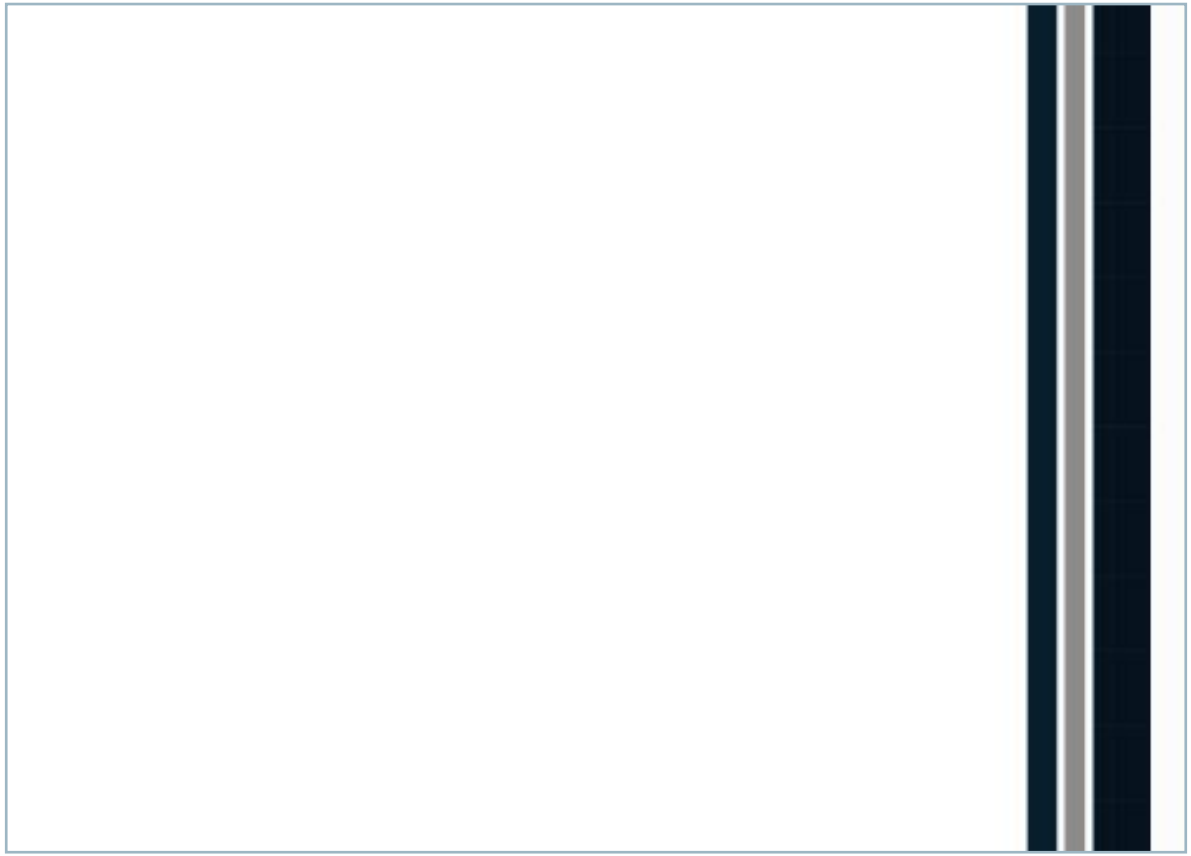
3. DOWNLOAD PDF
Save a separate copy of the file

4. CLOSE
Close this viewer/dialog and return to the underlying application screen.

Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

40 Help: open the manual inside TRM Pro

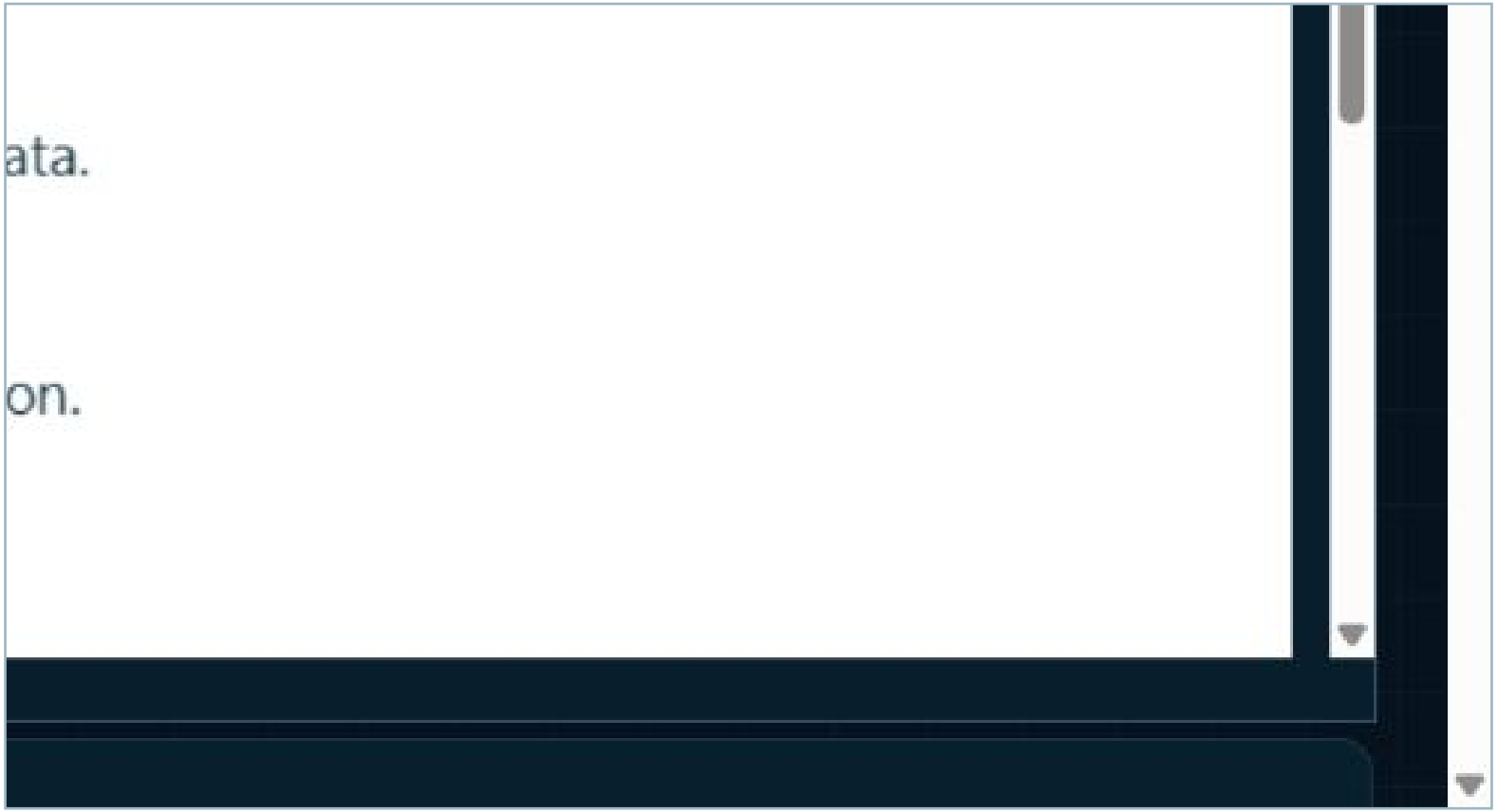
Illustrated detail 02 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

40 Help: open the manual inside TRM Pro

Illustrated detail 03 • orange numbers point to the named controls



Detailed field definitions follow these screenshots. Demonstration records only; use your actual company data.

PREV	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
NEXT	Use this named action/tab for the workflow described in this chapter. Check the selected record before continuing.
DOWNLOAD PDF	Save a separate copy of the file. The saved operation attachment is not changed by downloading.
CLOSE	Close this viewer/dialog and return to the underlying application screen.

41 Examples, shift reference and final checks

Workflow • read before using the illustrated controls

1. Plan calculation: 40 pieces × 12 minutes ÷ 60 = 8 planned hours. Completed 25 leaves 15 pieces and 3 hours at that cycle time.
2. Daily intervals: first component 07:00–10:00, next 10:00–15:00. Do not use 07:00–15:00 for both components. Review one-hour break deductions and displayed hours.
3. Shift reference: A 07:00–15:00, B 15:00–23:00, C 23:00–07:00 = 7 paid hours. DAY/NIGHT 7-to-7 = 11 paid hours, 4 OT. G 09:00–18:00 = 8 paid hours, no OT.
4. Before approving overtime, confirm employee eligibility, nonoverlapping times, actual output and the zero-OT filter. Read cycle-effective hours separately from clock hours.
5. Before stock approval, match unit, form, grade and size. Expected returns become stock only after RECEIVED.
6. Before a daily management review, verify period, date and department. Expand the report section with its corner arrow when details are hidden.

42 Troubleshooting and administrator update procedure

Workflow • read before using the illustrated controls

1. Desktop still shows an old screen: close TRM Pro, apply the desktop update as instructed, then reopen the desktop shortcut. Updating only C:\ToolRoomWeb development files does not automatically update an installed packaged EXE.
2. Permission denied: ask Admin to review the module and action right, department and machine group. Do not grant broad access solely to remove a message.
3. Data folder unreachable: open the configured shared path in Windows File Explorer. Confirm the host PC is on, Wi-Fi/LAN is available and the current Windows account can read/write the share.
4. Access denied under ProgramData static files or missing staticfiles manifest: stop the running application and use the approved installer/update repair. Do not delete the database or replace customer data with a test database.
5. Mobile cannot reach the PC: verify the PC address, bridge service/listening port and Windows Private-network firewall rule. The earlier mobile connection used port 8780. The PC and mobile must be on a network that allows device-to-device connections.
6. CSRF/403 after login: reload the form and retry from the current session. Persistent failure requires checking the host/origin settings. A 400 host error is distinct from an account permission denial.
7. Before any update, close the application and back up the common database and uploaded files. Use the provided administrator update package; retain its backup/log until verification is complete.
8. After updating check login, one process plan, daily entry, reports, stock history and operation viewers. Verify Help opens this manual. Keep the actual production database outside the installer payload.

Practical notes

The manual screenshots contain invented sample records. The installer must not create these employees/projects or ship their demonstration database. No hardware key, SMS account or cloud service is configured merely by reading these instructions.