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11.1 System Information
11.2 General Settings: Language
11.3 E-Mail Notification
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12 Settings for all Lines
12.1 Serial Number Management
12.2 Password and Login Settings
12.2.1 Active Directory Settings
12.3 Rank Descriptions

13 Log Entries (A-1.11)

14 Appendix
14.1 PSM messages and e-mail notification
14.2 Module Options
<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>14.2.1</td>
<td>Module Trigger via Timer</td>
<td>64</td>
</tr>
<tr>
<td>14.3</td>
<td>User Rights Table</td>
<td>65</td>
</tr>
<tr>
<td></td>
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<td>68</td>
</tr>
</tbody>
</table>
1 General Information

1.1 Service

If you wish to contact the Service Department, please have as much information on hand as possible:

- Machine type
- Serial number
- Year of manufacture
- METTLER TOLEDO PCE order number and date
- Software version
- Precise wording of the displayed error message or detailed fault description

The Service Department will send you a technical questionnaire to analyze your technical request. Completing this questionnaire will help us to solve your technical issue in an efficient way.

Country | E-Mail Address | Phone
--- | --- | ---
Austria, Hungary, Slovakia, Slovenia | AT01-mb-service-mt-a@mt.com | +43 1 6041990
Belgium | info@codivex.be | +32 32 98 31 16
France | sav.pi@mt.com | +33 1 30 97 17 99
Germany | ServicePID@mt.com | +49 5121 933 160
Italy | MTPCE.Service@mt.com | +49 6251 8545 555
Korea | MT-KR.ServiceSupport@mt.com | 1588-0180
| | | +82 2 3498 3566
Mexico | ServicePID@mt.com | +49 5121 933 160
Netherlands | ServicePID@mt.com | +49 5121 933 160
Switzerland | Dispatching.ch@mt.com | +41 44 944 47 47
Turkey | Kadir.key@mertteknik.com | +90 212 438 38 84-0
UK / IE | Service.CIVision@mt.com | +49 5121 933 160
US | Service.CIVision@mt.com | +1 630-446-7716
Rest of the World | MTPCE.Service@mt.com | +49 6251 8545-555

1.2 Language

This English document is the original document.

1.3 Formatting and Meaning

The formats used in this manual have determined meanings. If they are used they denote the following:

<table>
<thead>
<tr>
<th>Format</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>'PC'</td>
<td>Menu Paths, Buttons at the screen surface, fixed tab names,</td>
</tr>
<tr>
<td></td>
<td>names of screens and dialogs</td>
</tr>
<tr>
<td>'apostrophes'</td>
<td>Names of fields, checkboxes, modes, parameters</td>
</tr>
<tr>
<td>&lt;angle brackets&gt;</td>
<td>wildcard for tab names of devices (individual names can be assigned)</td>
</tr>
</tbody>
</table>
1.4 How to Use Screenshots

Below each screen, you see the path how to get there¹. Additional actions that are to perform at this screen are described below the screen². Wildcard buttons³ and actions at the path are placed in brackets. See the following example:

Management > Line Management > Edit Lines > edit Lines (select line)³
² After you made the changes press Save.

Screens (a)
All full screens accessed from the main navigation bar.

Windows (b)
All pop-up screens accessed by clicking or double clicking an entry/button. After performing an action at a frame the frame has to be closed by clicking the “x” buttons at the upper right corner of the window.

Frames (c)
The screens and windows are divided in frames that can be opened by clicking the “+” buttons or closed by clicking the “−” buttons.
2 Safety

2.1 Explanation of Symbols

The notes contain recommended instructions for workflow and data handling to avoid data loss or other problems.

**NOTICE**

- This symbol indicates instructions and information which help avoiding data loss or other issues.

- This symbol indicates useful workflow recommendations.

2.2 Principles of Proper Use

For correct and safe application of the PCE software observe the following instructions.

- It is necessary to read the complete operations instructions before starting up the PCE components in order to avoid false application of the systems.
- For your own safety, please observe the safety instructions in the operating manual. Please read the instructions carefully even if you are already used to the application and operation of PC components.
- These operating instructions do not replace installation and service by trained personnel!
- The software must only be used in a technically flawless condition, as intended and in accordance with this operating manual, and only by safety-conscious persons aware of the risks involved! In particular, any malfunctions affecting safety must be remedied immediately.
- Always keep the operating manual close at hand in the location where the system is in use.
- In addition to the operating manual, observe all generally applicable legal and other mandatory provisions regarding accident prevention and environmental protection and instruct others to do so as well.
- Amend the operating manual by adding instructions, including supervisory and reporting duties, to allow for specific operational aspects, e.g. regarding the organization of work, processes, and assigned personnel.
- It is mandatory that all personnel assigned to perform tasks involving the system have read the operating manual, above all the safety information chapter, prior to starting their work.
- Regularly check that personnel members are working in accordance with the operating manual in a safety-conscious manner and are demonstrating risk awareness in doing so.
- Adhere to the deadlines for recurring inspections if these are specified in the operating manual.
- These operating instructions are to be treated as strictly confidential. The information given herein shall not be copied, misused or made available to third parties without PCE’s prior written consent.
- PCE is continuously enhancing all components. Modifications of the scope of delivery in form, technique and configuration are subject to change. We appreciate your understanding that no claims can be made from information and illustrations of this operation manual.

2.3 Qualifications of Personnel

For the purpose of these operating manual, a “qualified person” is one who is familiar with the operation of the software and system and the hazards involved.

- Work at/using the system must only be performed by authorized personnel
- Only assign trained or instructed personnel to such tasks. Clearly define personnel responsibilities for operating, setup, maintenance and repairs
- Make sure that only assigned personnel uses the system
- Only allow personnel that is currently being trained or instructed or is undergoing general vocational training to use the machine under the supervision of a person with experience
3 Functions Overview

3.1 Scope (A-1.2.1)

The Pilot Site Manager (PSM) is the management component of the Pilot Software Suite of PCE. A production plant comprises typically a number of lines that are equipped with track & trace equipment. Each line is managed by a line controller (Pilot Line Manager). The Pilot Site Manager (PSM) is the centralized management software for track & trace at a production site with the following key functionalities.

- Order Management: Add / edit Orders
- Product Management: Add / edit Products
- Serial number Management
- User Management: Add / edit Users and User groups
- Report generation for states, qualification etc.
- Connection to ERP systems to exchange serial numbers and order / product data

Production line track and trace

The order, the product and the line format can be created and edited and data is stored to the central database PLM (e.g. LOT, GTIN). The data is then retrieved and processed by the PLM. Dynamic data (serial numbers) are sent after request during production. The supervisor is able to manage all lines with minimum effort; the provided settings are stored in the central database.

Further features of the PSM are standard web services for 3rd party vendors and direct client implementation of order/product and serial number import and export. PSM allows you to manage all PCE Pilot Line Managers from a single application. You can add / edit orders, products, manage formats and serial numbers, generate reports and track the audit trail. The scope for the Pilot Line Manager is to execute orders on a line, the PSM on the other hand is for management purposes and the interaction between other enterprise software in your company.

The PSM acts also as the interface between the PCE system and external resources such as ERP systems. PSM offers a set of SOAP web services you can directly use as the interface or customized extensions can be provided to perfectly fit in the existing IT environment.

The PSM is designed as a web based application that can be made accessible from PC, tablet PC and smartphone. It runs on an application server based on the latest Java Enterprise Technology. Therefore, it can be accessed from any device, which is connected to the same network via web browser.

To meet custom specific requirements, the PLM is divided into the Core Module (which is described in this manual) and modules to perform actions like serial number import, order export customer-specifically.
3.2 Level Definitions (A-3.4)

This is an overview of the control levels at the aggregation/serialization process. The following figure is an example how a visual inspection production can basically look like. The detailed structure of your system is defined in the functional specification.

Control levels at the aggregation/serialization process

3.3 Definition of Common Used Terms

Common terms used to describe aggregation are determined below.
### Unit and Rank

<table>
<thead>
<tr>
<th>Trade Unit</th>
<th>Rank</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>1</td>
<td>An item is the smallest unit at the aggregation process. This can be a folding box, a blister or a bottle for example. It is usually aggregated to a bundle or directly to a shipping case.</td>
</tr>
<tr>
<td>Bundle</td>
<td>2</td>
<td>A bundle consists of several items.</td>
</tr>
<tr>
<td>Case</td>
<td>3</td>
<td>A case is a carton box where either bundles or items directly are packed into.</td>
</tr>
<tr>
<td>Pallet</td>
<td>4</td>
<td>A pallet contains several cases.</td>
</tr>
<tr>
<td>Unit</td>
<td>1/2/3/4</td>
<td>A unit is the term for any aggregation level. The term unit is used for an item (Rank1), bundle (Rank2), a shipping case (Rank3), or a pallet (Rank4).</td>
</tr>
</tbody>
</table>
4 The PSM Workspace and Usage

4.1 Log in / Log off

Log in
To login enter the username and the password at the start page.

Log off
To log off click <User> log off.

4.1.1 Home Screen

After log in at the PSM, you see the home screen:

Table: Navigation bar buttons

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Possible Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Overview of lines, log entries and date</td>
</tr>
</tbody>
</table>
### Menu Item | Possible Actions
---|---
Settings | System Information  
| Change Language  
| E-Mail Notification  
| Settings Active Directory Settings  
| Timer Settings
Management | Add, edit and activate AI’s  
| Add, edit, import, export and move orders and products  
| Add, edit user and user groups  
| Import and manage serial numbers and serial number ranges
Log Entries | All log entries of all lines (Audit Trail)
Help | This Manual is opened
User> log off | Log off

### Table: Overview at home screen

<table>
<thead>
<tr>
<th>Frame Name</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>At the field ‘Date’ you see the current date and time.</td>
</tr>
<tr>
<td>Line Overview</td>
<td>Overview of all lines</td>
</tr>
<tr>
<td>Log Entries</td>
<td>Last 7 Log entries of all added lines (Audit Trail)</td>
</tr>
</tbody>
</table>

### Frame arrangement at home screen

At the home screen you can arrange the frames individually. Arrangement will be saved and retained for later logins. Simply drag a frame, move it and drop it to the wished area. Possible areas will be highlighted in grey color.

![Frame arrangement at home screen](image)

Home (arrangement)
4.2 Menu Tree Overview

The menu tree shows the maximum possible menu structure of the system.

4.3 Help Button

When clicking Help, this manual is automatically opened in HTML.
5 Administration of Users and Groups (A-1.10)

The User Management settings at the PSM are equivalent to the settings at the PLM. Both systems use the same user profiles. At the PSM all user rights are being managed centrally. Name, password and certain rights are assigned to each user access/group respectively. The type of right/group determines access to the possible program functions. A user management is included in order to add/edit and delete users and groups. All functions in the software can be restricted due to user rights, assigned to a group or user. Rights can be assigned directly to a user, or along with other rights building a group which can then be assigned to a user.

5.1 User Management

5.1.1 The Edit Users Screen

Below the EDIT USERS Screen is shown. From this screen you can add users, change username and password, add users to a group and add or withdraw rights to a user. Click Management > User Management > Edit Users, the following screen appears:

5.1.2 Adding a User

At a user profile you can determine which rights are assigned to each user, i.e. which functions are allowed to perform on the PSM/PLM and which not. Each user must be allocated to a profile. User profiles can be assigned, edited and removed by users with the corresponding administration rights. See the “User Rights Table” at the PLM manual.

Perform the following steps:

1. Click add user at the EDIT USERS screen (see chapter [The Edit Users Screen 16]). The following window appears:

2. Click the input field next to ‘Username’ and enter a name for the new user.

3. Click the input field next to ‘Description’ and enter the description.

4. Click the input field for ‘Password’ and enter the password. The password is always displayed as asterisks ****. It does not appear in plain text while entering.

5. Click add to save all entries. If you wish to clear the fields click reset.

⇒ After clicking add the new user is added.
We recommend writing down the passwords and keeping them in a safe place. If passwords have been lost or forgotten, only the “after sales service” of PCE can reestablish the access.

5.1.3 Editing Users

Select a user to edit from the list at the frame ‘edit Users’ at the EDIT USERS screen (see chapter [The Edit Users Screen 16]). The following window appears:

<table>
<thead>
<tr>
<th>User</th>
<th>Groups</th>
<th>Rights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Username: pceadmin</td>
<td>Administrator</td>
<td>useSQLAdminManager</td>
</tr>
<tr>
<td>Description: Supervisor</td>
<td>Engineer</td>
<td>mayAddOrderData</td>
</tr>
<tr>
<td>new Password:</td>
<td></td>
<td>mayStartTestRun</td>
</tr>
<tr>
<td>repeat Password:</td>
<td></td>
<td>mayStopProdOrder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maySleepProdOrder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mayEditTimeformat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mayAddOrderData</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mayStartTestRun</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mayStopProdOrder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>maySleepProdOrder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>mayEditTimeformat</td>
</tr>
</tbody>
</table>

At the window above you have the following options:
- Change username and password
- Add user to a group
- Add or withdraw rights to a user

These actions are described in the following chapters.

5.1.4 Changing Username and Password

To change Username and password perform the following steps:

1. Go to the screen at chapter [Editing Users 17].
2. At the frame ‘User’ click the field next to ‘Username’ and enter username.
3. Click the field next to ‘Description’ and enter the description.
4. To change the password, fill in the password into the fields next to ‘new Password’ and ‘repeat Password’.

5. Click **save** to save the settings.

5.1.5 **Adding a User to a Group**

Go to the screen at chapter [Editing Users ➤ 17]. At the ‘Groups’ frame drag and drop (or select and click the **add** button) a group from the left list (available) to the right list (assigned). The user then belongs to all the groups at the right list (assigned).

To define group affiliations you have the following options:

<table>
<thead>
<tr>
<th>Table: Options for group affiliations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
</tr>
<tr>
<td>Add All</td>
</tr>
<tr>
<td>Remove</td>
</tr>
<tr>
<td>Remove All</td>
</tr>
</tbody>
</table>

5.1.6 **Adding or Withdrawing Rights to a User**

Go to the screen at chapter [Editing Users ➤ 17]. At the Rights frame drag and drop (or select and click the **add** button) a right from the left list (available) to the right list (assigned). All rights at the right list (assigned) are assigned to the user.

5.2 **Creating and Editing Groups**

Within the groups menu you can create new groups. For user group rights see the User Rights Table chapter [User Rights Table ➤ 65].

5.2.1 **The Edit Groups Screen**

Below the **EDIT GROUPS** screen is shown. From this screen you can add or edit groups. Click Management > User Management > Edit Groups, the following screen appears:

5.2.2 **Adding a New Group**

To add a new group perform the following steps:
1 Click add group at the **EDIT GROUPS** screen (see chapter [The Edit Groups Screen](#) 18). The following window appears:

![Edit Group Window](image1.png)

Management > User Management > Edit Groups > Add Group

2 Click the input field next to ‘Groupname’ and enter the name of the new group.

3 Click the input field next to ‘Description’ and describe the group in a few words.

4 Click ***add*** to save all entries. If you wish to clear the fields click ***reset***.

   ⇒ After clicking **add** the new group is added.

### 5.2.3 Editing Groups

Select a group to edit from the list at the frame ‘edit Groups’ at the **EDIT GROUPS** screen (see chapter [The Edit Groups Screen](#) 18). The following window appears:

![Edit Group Window](image2.png)

Management > User Management > Edit Groups > (select group)

At this window you have the following options:

- Change the name of a group
- Assign user rights to a group

These actions are described in the following chapters.

### 5.2.4 Changing the Name of a Group

Go to the screen at chapter [Editing Groups](#) 19. At the frame ‘User Group’ click the field next to ‘Groupname’ and enter the group name.

### 5.2.5 Assigning User Rights to a Group

Go to the screen at chapter [Editing Groups](#) 19. At the frame ‘Rights’ drag and drop (or select and click the add button) a right from the left list (available) to the right list (assigned). The right is then assigned to the group.

To assign user rights to a group you have the following options:
### Table: Options at user right assignment

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Select one or more users and click Add</td>
<td>One or more users are added</td>
</tr>
<tr>
<td>Add All</td>
<td>Select Add All</td>
<td>All users are added</td>
</tr>
<tr>
<td>Remove</td>
<td>Select one or more users and press Remove</td>
<td>One or more users are removed</td>
</tr>
<tr>
<td>Remove All</td>
<td>Select Remove All</td>
<td>All users are removed</td>
</tr>
</tbody>
</table>
6 Line Management (A-1.9)

To use a line at the PSM, it has to be created. Afterwards a line format has to be assigned to each line. You can use an existing line format or create a new one. A line format contains the settings for all used devices at a line. Here the fields and permitted values of each device are defined at the PLM. Optionally, you can assign a product to the line format to apply its settings to the line format. For each line you can change the line settings. The changes made at the line settings in the PSM are immediately accepted at the system settings in the PLM.

6.1 Edit Lines Screen

Below the EDIT LINES screen is shown. From this screen you can create or delete lines and make all settings concerning line and line format. Go to Management > Line Management > Edit Lines. The screen looks as follows:

At this screen you have the following options:
- Add / edit / delete lines
- Add a line format to line / deactivate a line format
- Assign a product to a line format
- Add / edit / delete line settings

These actions are described in the following chapters.

6.2 Line

6.2.1 Adding a new Line

To add a new line perform the following steps:

1. Click add line at the EDIT LINES screen (see chapter Edit Lines Screen 21). The following window appears:

2. Click the input field next to ‘Line Name’ and enter the name of the line.
3. Click the input field next to ‘Description’ and enter some description for the line.
4. Press add to add the line.

After clicking add the new line is added.
6.2.2 Editing a Line

To edit a line perform the following steps:
1. Select a line to edit from the list at the frame ‘edit Lines’ at the EDIT LINES screen (see chapter [Edit Lines Screen > 21]). The following window appears:

   - Line Name: DMT
   - Description: developer line

   Lineforms
   - Name
   - Description

   Linssettings
   - save
   - delete

2. At the frame ‘Line’, click next to ‘Line Name’. An input field appears, where you can change the name.
3. Click next to ‘Description’. An input field appears where you can change the description.
4. Press save to save the settings.

   After clicking save the new line settings are saved.

6.2.3 Deleting a Line

Select a line to delete from the list at the frame ‘edit Lines’ at the EDIT LINES screen (see chapter [Adding a new Line > 21]). The following window appears:

To delete the line click delete.
6.3 Line Format

A line format contains the settings for all used devices at a line. In the line format the fields and permitted values of each device are defined. The line format has to be created either at the PLM or at the PSM and can then be edited by both programs.

In this chapter it is described how to:

- Add a new line format
- Assign a product to a line format
- Delete a line format

6.3.1 Adding a new Line Format to a Line

To add a new line format to a line perform the following steps:

1. Select a line from the list at the frame ‘edit Lines’ at the EDIT LINES screen (see chapter [Edit Lines Screen → 21]). The following window appears:

   ![Edit Lines Screen](image1.png)

   Management > Line Management > Edit Lines > edit Lines (select line)

2. Click add at the ‘lineformats’ frame. The following window appears:

   ![Add Line Format](image2.png)

   Management > Line Management > Edit Lines > edit Lines (select line) > add (line format)

3. Enter the name for the line format and click add to save the new line format to the line

   After clicking add the new line format is added to the line.
6.3.2 Assigning a Product to a Line Format

To assign a product to a line format perform the following steps:

1. To use a product it has to be assigned to a line format. Select a line from the list in the frame ‘edit Lines’ at the EDIT LINES screen (see chapter [Edit Lines Screen] 21). The following window appears:

Management > Line Management > Edit Lines > edit Lines (select line)

2. At the screen above select the line format under ‘lineformats’. At the screenshot above the available line format is called <Virtual Lineformat>. The following screen appears:

Management > Line Management > Edit Lines - edit Lines > (double click line format)

3. Click next to ‘Productname’, a scroll down menu appears. Select a product.

4. Press save to assign the product to the line format.

   After clicking save the product is assigned to the lineformat.

6.3.3 Deactivating (Deleting) a Line Format

A line format cannot be deleted but deactivated. When a line is deactivated it is stored to the database and no longer available at the PSM. To deactivate a line format perform the following steps:
1. Select a line from the list in the frame ‘edit Lines’ at the EDIT LINES screen (see chapter [Edit Lines Screen ‣ 21]). The following window appears:

![Edit Line Screen]

2. Select the line format under ‘lineformats’. At the screenshot above the available line format is called <Virtual Lineformat>. The following screen appears:

![Line Format Screen]

3. Click deactivate. A dialog appears, confirm with delete.

   ✐ After clicking delete the line format is deactivated.

### 6.4 Line Settings

For each line the line settings at the PSM are equivalent to the system settings at the PLM. Adding a line setting at the PSM equals setting a checkbox to activate a setting at the system settings in the PLM. To assign a line to the PLM, the PLM has to be switched to the line (see PLM Operating Manual). The line settings made at the PSM are applied immediately to the PLM system settings of a line. Conversely, all settings made at the PLM system settings will be applied immediately to the PSM line settings.

### 6.4.1 Adding Line Settings

To add line settings to a line perform the following steps:
1. Select a line at the EDIT LINES screen (see chapter [Edit Lines Screen 21]). The following window appears:

![Edit Lines Screen]

Management > Line Management > Edit Lines > edit Lines > (select line)

2. Click **add** at the frame 'linesettings'. The following window appears:

![Add Linesetting Window]

Management > Line Management > Edit Lines > edit Lines > (select line) > add

3. Select the line setting you wish to add at the scroll down menu next to ‘Linesetting’.

4. Enter the value for the line setting at the field next to ‘Value’.

5. Click **add** to add the line setting to the line.

   ⇒ After clicking **add** the new line setting is added to the line.

### 6.4.2 Editing line settings

In this chapter it is described how to:

- Change name of a line setting

To edit the line settings perform the following steps:
1. Select a line at the **EDIT LINES** screen ([Edit Lines Screen > 21]). The following window appears:

   ![Edit Lines Screen]

2. Click the pencil button at the frame ‘Linesettings’ in the column ‘edit’ of the setting you wish to edit. The screen looks as follows:

   ![Edited Setting Screen]

3. Enter the new value at the field in the column ‘value’.
4. Click the checkmark to close the editing mode. After clicking the checkmark, the window closes and the value is changed.

### 6.4.3 Deleting Line Settings

To remove a line setting from a line perform the following steps:

...
Select a line at the **EDIT LINES** screen (see chapter [Edit Lines Screen > 21]). The following window appears:

1. Select the line setting you wish to delete.
2. Click **delete** to delete the line setting.
3. After clicking **delete**, the line setting is removed from the line.
7 AI Management (A-1.5)

7.1 The Edit AI’s screen

At the EDIT AI’s screen you can edit the name and the description of the AIs, deactivate it and define dependencies between it. Defining dependencies between AIs means, when an AI is selected at the PLM, all dependent AIs are also selected and have to be used.

To edit AIs go to the EDIT AI’s screen:

Management > AI Management > AI Management > Edit AI’s

7.2 Adding AI

Click add AI at the EDIT AI’s screen (see chapter [The Edit AI’s screen 29]). The screen looks as follows:

Management > AI Management > AI Management > Add AI

Enter the AI (code) into the input field next to ‘AI’. Enter the name for the AI into the input field next to ‘Name’. Enter some description for the AI into the input field next to ‘Description’.

7.3 Editing AI

- We recommend retaining settings of predefined AIs because these are corresponding to the predefined device formats of the PLM.

To edit AIs perform the following steps:
1 Click edit AI’s at the EDIT AI’s screen (see chapter [The Edit AI’s screen ➔ 29]). The following screen appears:

![Edit AI's screen](image)

Management > AI Management > AI Management > edit AI’s

2 Double click the AI you wish to edit. The following window appears:

![Edit AI window](image)

Management > AI Management > AI Management > edit AI’s > (double click AI) > (AI)

3 At the frame ‘AI’ you can change name and description of the application identifier. Click next to ‘AI’ and enter the AI (code) into the input field.

4 Click next to ‘Name’ and enter the name into the input field.

5 Enter some description of the AI into the input field next to ‘Description’.

6 Click **save** to save the changes.

7.3.1 Defining Dependencies

Defining dependencies between AIs means, when an AI is selected at the PLM, all dependent AIs are also selected and have to be used. For example you can define the AIs BATCH/LOT (AI10) and EXPIRY (AI17) as dependent on GTIN (AI01). Then when the GTIN is selected at the PLM line format, the fields for the dependent AIs (Batch, expiry) also appear.

- We recommend retaining settings of predefined AIs because these are corresponding to the predefined device formats at the PLM.
1. Click **edit AI’s** at the EDIT AI’S screen (see chapter [The Edit AI’s screen] (29)). The screen looks as follows:

![Edit AI's Screen](image)

Management > AI Management > edit AI’s

2. Double click the AI for which you wish to define dependencies. The following window appears:

![Dependencies Frame](image)

Management > AI Management > edit AI’s > (double click AI) > (Dependencies frame)

3. At the frame ‘Dependencies’ drag and drop (or select and click the add button) an AI from the left list (available) to the right list (dependent AI’s). The AIs at the right list (dependent AI’s) are dependent on the AI previously opened via double click. To define dependencies you have the following options:

4. Press **save** to save the settings.

5. After pressing **save** the dependencies settings are saved.

**Table: AI Dependencies**

<table>
<thead>
<tr>
<th>Button</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add</td>
<td>Select one or more AIs and click Add</td>
<td>One or more AIs are added</td>
</tr>
<tr>
<td>Add All</td>
<td>Select Add All</td>
<td>All AIs are added</td>
</tr>
<tr>
<td>Remove</td>
<td>Select one or more AIs and press Remove</td>
<td>One or more AIs are removed</td>
</tr>
<tr>
<td>Remove All</td>
<td>Select Remove All</td>
<td>All AIs are removed</td>
</tr>
</tbody>
</table>
Some dependencies are predefined but you can edit the dependencies individually.

### 7.3.2 Deactivating / Activating Al’s

**Deactivate**

When deactivating an AI, it is no longer available at the PLM. This feature can be useful if you do not need some AIs for the moment and you do not want to have them at the list of AIs but want to reuse them later.

1. Click **edit AI’s** at the **EDIT AI’S** screen (see chapter [The Edit AI’s screen ▶ 29]). The following screen appears:

![Edit AI Screen]

Management > AI Management > AI Management > edit AI’s > edit AI’s

2. Double click the AI you want to deactivate. The following window appears:

![Edit AI Window]

Management > AI Management > AI Management > edit AI’s > (double click AI) > (Dependencies)
3 Click deactivate. The following window appears:

Management > AI Management > AI Management > Edit AI’s > edit AI’s > (double click AI) > (Dependencies) > deactivate

4 Click deactivate to confirm the deactivation.
⇒ After clicking deactivate, the AI is deactivated.

Activate AI

1 Click deactivated AI’s at the EDIT AI’s screen (see chapter [The Edit AI’s screen] 29). The screen looks as follows:

Management > AI Management > AI Management > deactivated AI’s

2 At the frame ‘deactivated AI’s’ set a check at one or more AIs and click activate to activate it.
⇒ After clicking activate, the AIs are activated.
8 Order Management - Adding, Editing and Moving Orders

At the PSM you can add, edit, move, delete, export and import orders.

8.1 The Edit Orders screen

To edit an order go to the EDIT ORDERS screen:

Management > Order Management > Edit Orders

At this screen you have the following options:

- Create orders
- Edit orders

These actions are described in the following chapters.

8.2 Creating a New Order

Click create order at the EDIT ORDERS screen (see chapter [The Edit Orders screen ▶ 34]). The following screen is opening:

Management > Order Management > Edit Orders

1. Enter the name of the order into the input field next to ‘Ordername’.
2. Enter some description for the order into the input field next to ‘Description’.
3. Click add to create the new order.

After clicking add the order is created.

8.3 Editing an Order

In the following chapters it is described how to:

- Add order data: Rank, AI, AI Value
- Change GTIN
• Change order name, description and state
• Delete order

1. Click edit order at the EDIT ORDERS screen (see chapter [The Edit Orders screen ⇒ 34]). The screen looks as follows:

   ![Edit Orders Screen]

   Management > Order Management > Edit Orders > edit Orders

2. Select an order to edit.
   ⇒ You can filter the orders by name (enter the name of the order into the field below ‘Search’) or by state and line (select the state of the order from the scroll down menu under ‘State’ or the line where the order is assigned to at the scroll down menu under ‘Line’).

3. To edit an order select it from the list. The following window appears:

   ![Edit Order Details Screen]

   Management > Order Management > Edit Orders > edit Orders (select order)
   ⇒ At this window you have the following options:
      - Add order data: Rank, AI, AI Value
      - Change GTIN
      - Change order name, description and state
      - Delete order

   These actions are described in the following chapters.
8.3.1 Add Order Data: Rank, AI, AI Value

Select an order at the edit orders screen (See chapter [The Edit Orders screen ➞ 34]). Select add at the 'edit Orderdetails' window (see above). The following window appears:

Management > Order Management > Edit Orders > edit Orders (select order) ➞ add
Select rank and AI at the corresponding scroll down menus. Enter a value for the AI at the 'value' field. Click add to add the new AI.

8.3.2 Change GTIN

At the 'edit Orderdetails' window (see above) click on the pencil button next to the AI you wish to edit, at the frame 'Orderdata' in the column 'edit'. Edit the GTIN value and click the checkmark to confirm the settings. See screen below:

Management > Order Management > Edit Orders > edit Orders (select order) ➞ (pencil)

8.3.3 Change Order Name, Description and State

**NOTICE**
Avoid manual assignment
Manual assignment of states should only be done in exceptional cases and by authorized and trained personnel.

To edit the order name and description perform the following steps:

1. At the frame 'Master Data' click the field next to 'Ordername' and enter a name for the order.
2. Click the field next to 'Description' and enter some description for the order.

Usually order states are assigned automatically. Manual assignment of states should only be done in exceptional cases and by authorized and trained personnel.
8.3.3.1 Resending an Order If Sending Failed

Usually, if sending of an order failed, its state “sent” is automatically set to state “sent failed”. In this case you can select the corresponding setting at the order module for export (see chapter [Filter for Export ➔ 41]).

If an order is set to state “sent” but is not found in the ERP system for any reason; it can be sent again by setting it to state “sent failed” and selecting the corresponding setting at the order module (see chapter [Filter for Export ➔ 41]).

Click the field next to ‘State’, a scroll down menu appears. Select a state for the order from the scroll down menu. See the following screen:

Management > Order Management > Edit Orders > edit Orders (select order) > (Edit fields)

An order can only have one state at once. The following table lists the states and their meaning:

Table: Order stats

<table>
<thead>
<tr>
<th>State</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREATED</td>
<td>Created but not assigned</td>
</tr>
<tr>
<td>ASSIGNED</td>
<td>Assigned to line and line format</td>
</tr>
<tr>
<td>SUSPENDED</td>
<td>Suspended</td>
</tr>
<tr>
<td>FINISHED</td>
<td>Finished</td>
</tr>
<tr>
<td>QA_RELEASED</td>
<td>This state is used for verification by third person. The verifier sets this state to verify the release.</td>
</tr>
<tr>
<td>SENT</td>
<td>After an order has been exported the state is set to “sent”</td>
</tr>
<tr>
<td>SENT_FAILED</td>
<td>If an order could not be sent e.g. due to lost of network connection, it is set to state “sent failed”.</td>
</tr>
<tr>
<td>FINISHED_TESTORDER</td>
<td>Test order was finished</td>
</tr>
<tr>
<td>SENT_TESTORDER</td>
<td>Test order was sent</td>
</tr>
<tr>
<td>EXPORTING</td>
<td>While an order is exported, it is temporarily set to state “exporting”</td>
</tr>
<tr>
<td>CACHED</td>
<td>Order is produced in local cache mode</td>
</tr>
<tr>
<td>UNDEFINED</td>
<td>Only for PCE service staff</td>
</tr>
</tbody>
</table>
8.3.4 Delete an Order / Delete an Order GTIN

To delete an order or a GTIN of the order, select the order at the EDIT ORDERS screen (see chapter [Editing an Order > 34]). The following window appears:

Delete an order GTIN
To delete a GTIN set a checkmark at its row (at the field ‘Orderdata’) and press delete (at the frame ‘Orderdata’) and confirm by pressing delete again.

Delete an Order
To delete an order select delete (at the bottom of the window) and confirm by pressing delete again.

8.4 Move Order to Line

This action allows moving an order from one line to another. An order is assigned to a line via line format.
To move an order to another line you have to assign the line format which is assigned to the line. The order will be only visible and executable on the line where the line format is referencing.

8.4.1 The Move Orders Screen

At the move orders screen you can select an order to move it to another line. The screen looks as follows:

Management > Order Management > Move Orders
Select the order you want to move to another line. The following window appears:

Press Management > Order Management > Move Orders (select order to move)
⇒ The movement of the order is done via the line formats. This means; to move an order to another line you have to select the line format which is assigned to this line. After changing the line format the order is moved to the corresponding line automatically.

2 Click the field next to ‘Lineformat’ and select a line format from the scroll down menu (see above).

3 Click move to move the order to the corresponding line.
⇒ After clicking move the order is moved to the line.

8.5 Order Export

The export module allows exporting orders manually for later import to an ERP system. The function is only available when a module for order export is installed. For specific information about your module see the operating manual of the corresponding module.

8.5.1 Exporting a single order

To export an order, perform the following steps:

1 Go to the order export Screen (Management > Order Management > Edit Orders > edit Orders > Create Order).
⇒ The screen looks as follows:

Press Management > Order Management > Move Orders (select order to move)

2 Select the order to be exported by setting a checkmark.
3  Press Export

⇒ A window opens in which a statistic of the order is shown:

4  Press Submit.

⇒ The order export is finished.

If values are missing the statistic the following points could be the reason:

• To show the “target value” (R06) for item level (rank1), a value for R06 has to be defined in the order data.

• The entries “empty” and “full” are not available for item level (rank1) but for higher levels (rank 2-8).

• If no value for “full bundle / full case / full pallet” is shown, check if there is a value defined for 37 or R37 in the order data for the specific rank. Note: If 37 and R37 are both used, 37 will be selected and R37 will be ignored.

8.5.2 Exporting several orders

To export several order at once, perform the following steps:
1. Go to the order export Screen (Management > Order Management > Edit Orders > edit Orders > Create Order).

- The screen looks as follows:

2. Select the order to be exported by setting a checkmark.

3. Click Export.

- A window opens in which the orders are shown:

4. Click Submit.

- After clicking Submit the order export is finished.

### 8.5.3 Filter for Export

1. Go to system settings > order export settings > (extended settings frame).

2. Select the categories to export the corresponding orders.
3  Set a delay in hours.
   ⇒ The delay defines a period of time after which the export will start. The delay will start after the order was finished. After export of orders, the order state of the exported orders is set to “sent”. If an order could not be sent due to lost of network connection, it is set to state “sent failed”.
   ⇒ You can retry to send these orders by selecting “sent failed”.

For descriptions of the states see chapter [Change Order Name, Description and State  36]

Settings > Systemsettings > Order Export > (extended settings)

8.6 Order Import

The import function allows importing orders manually (previously exported from an ERP system). The function is only available when a module for order import is installed (see appended import module description).

Orders including all order data can be imported from external sources like ERP systems or just XML files. If the import succeeds, the order has state CREATED and can be edited manually in PSM.

8.7 Order Result Hierarchy

In this chapter it is described how to:
• View all serial numbers of an order and their hierarchies

This feature allows you to view all serial numbers belonging to an order. If the order is for aggregation you can step through the whole hierarchy of the order, starting with the highest rank (most likely pallets).

1 Click Management > Order Management > Order Result Hierarchy, the following screen appears:
2. To see the history of an order, which has been produced, click on the ‘order’.
   ➔ A list with all serial numbers appears. See the following screen:

   ![Order Result Hierarchy](image)

   Management > Order Management > Order Result Hierarchy > (Select order)
9 Product Management - Adding and Editing Products (A-1.7)

A product at the PSM is a set of information about a product that can be assigned to a line format or to an order e.g. GTIN, quantity, bundle size, case size, pallet size. The values of the product are then filled into the fields of the line format / order. The possibility to reuse the contents of variables avoids having to re-enter it at the creation of every order. The AI values are then transferred into the fields of the order. Creating a product is not essential but optional. The Product Management settings at the PSM are equivalent to the settings at the PLM. They use the same products and these can be created or edited at both systems.

9.1 The Edit Products screen

Management > Order Management > edit products

At this screen you have the following options:

- Add a product
- Edit a product

These actions are described in the following chapters.

9.2 Adding a Product

Click Add Product at the EDIT PRODUCTS screen (see chapter [The Edit Products screen 44]).

1. At the frame ‘new Product’ enter the product name into the field ‘Productname’.
2. Enter some description for the product at the field ‘Description’.
3. Click add to save the new product.

⇒ See the following screen:

Management > Order Management > Add Order

⇒ After clicking add the product is added.

If you want to delete the entries click Reset instead of add.
9.3 Edit a Product

Click Edit Products at the EDIT PRODUCTS screen (see chapter [The Edit Products screen 44]) and select a product from the list. Use the search field to filter the products, if needed. The following window appears:

![Edit Products screenshot]

Management > Order Management > edit Products > edit Products (select product)

**Edit productname**

At the frame ‘Master Data’ click next to the field ‘Productname’ and edit the name of the product.

**Edit Product AI**

1. At the frame ‘Productdata’ click on the pencil " button next to the AI you wish to edit, in the column ‘edit’.

2. Edit the GTIN value and click the checkmark ✔️ to confirm the settings. See screen below:

![Edit Product AI screenshot]

Management > Order Management > edit Products > edit Products
9.3.1 Delete a Product / Delete a Product GTIN

To delete a product or a GTIN of the product, select the product at the EDIT PRODUCTS screen (see chapter [The Edit Products screen] 44). The following window appears:

Management > Order Management > edit Products > edit Products (select product)

**Delete a product GTIN**

To delete a GTIN set a checkmark at its row (at the field ‘Productdata’) and press delete (at the field ‘Productdata’) and confirm by pressing delete again.

**Delete a product Order**

To delete a product select delete (at the bottom of the window) and confirm by pressing delete again.
10 Serial Number Management

- Serial number management is available only when a module for serial number is installed.

10.1 Module Settings SN Import

Note that your individual module can differ from the following screen. Your own module can provide more or less functions according to your needs. The description of your individual module you find in the appended module description. A SNImport module can, for example, look as follows:

![SNImport module settings](image)

Settings > ModuleSettings > SN Import

10.2 GTINNumbers

In this chapter it is described how to:
- Add new GTIN
- Request serial numbers for GTIN
- Generate serial numbers for GTIN
- Edit values of GTIN

10.2.1 The edit GTINNumbers screen

![GTINNumbers edit screen](image)

Management > SerialNumber Management > edit GTINNumbers
10.2.2 Adding GTIN

In order to generate or request serial numbers a GTIN (or SSCC) must be defined. The pool sizes define the threshold of the serial number ranges. The pool buffer is used by the PLM to reserve a set of serial numbers during production.

edit GTINNumbers

At the GTINNumber frame you can edit the following fields (Fields with an *(asterisk) are mandatory):

Table: GTIN details

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>GTIN*</td>
<td>GTIN (14 digit numeric value)</td>
</tr>
<tr>
<td>EPC Hexadecimal</td>
<td>The EPC Hexadecimal field provides an optional value for this GTIN. It includes the same information as the GTIN + the filter value specified by GS1. The serial number part of the Hex will be ignored.</td>
</tr>
<tr>
<td>Rank*</td>
<td>Corresponding rank 1-8</td>
</tr>
<tr>
<td>Pool Minimum*</td>
<td>Threshold, when number of available serial numbers drops below, an automatic serial number import is activated via timer and the pool of serial numbers will be filled up with number of serial numbers corresponding to the Pool Buffer (requested) but not more than to the Pool Maximum.</td>
</tr>
<tr>
<td>Pool Maximum*</td>
<td>Maximum size of buffer to which the pool is filled up.</td>
</tr>
<tr>
<td>Pool Buffer*</td>
<td>Size of Buffer. The number of serial numbers buffered by the PLM at a request.</td>
</tr>
</tbody>
</table>

10.2.3 Requesting or Generating SNs for GTIN

You can import serial numbers from an ERP system or use generated serial numbers at the PSM. To import / generate serial numbers perform the following steps:

1. Go to the following screen:

Management > Serialnumber Management > import Serialnumbers
2 Select a GTIN number from the scroll down menu at the corresponding area (GTIN Request).

⇒ The screen looks as follows:

![Serial Number Management Interface](image)

The screen looks as follows:

3 Enter the quantity of serial numbers to be requested or click fill numbers to fill the actual number of pool maximum into the field ‘Quantity’.

4 Click request to request serial numbers from the ERP system.

10.2.4 Editing values of a GTIN

Previously created GTINs can be edited afterwards. Go to the edit GTINNumbers frame at the edit GTINNumbers screen (see chapter [The edit GTINNumbers screen ➞ 47]):

![Editing GTIN Numbers Interface](image)

Management > SerialNumber Management > edit GTINNumbers

1 Double click a GTIN at the edit GTINNUMBERS screen to edit the corresponding GTIN.

⇒ The following window appears:

![Edit GTIN Window](image)

Management > SerialNumber Management > edit GTINNumbers - (edit GTINNumbers)

2 You can edit the fields ‘EPC Hexadecimal’, ‘Rank’, ‘Pool Minimum’, ‘Pool Maximum’ and ‘Pool Buffer’ by clicking the fields next to it (See chapter [Adding GTIN ➞ 48]).
10.2.5 The edit PPNNumber screen

Management > Serialnumber Management > edit PPNNumbers

See also
- The edit GTINNumbers screen [47]
- Adding GTIN [48]

10.2.6 Adding PPN

In order to generate or request serial numbers a PPN must be defined. The pool sizes define the threshold of the serial number ranges. The pool buffer is used by the PLM to reserve a set of serial numbers during production.

Serialnumber Management > edit PPNNumber (add PPNNumber)

At the PPNNumber frame you can edit the following fields (fields with an * (asterisk) are mandatory).

**PPN Details:**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPN*</td>
<td>PPN (12 digit numeric value)</td>
</tr>
<tr>
<td>Rank*</td>
<td>Corresponding rank 1-8</td>
</tr>
</tbody>
</table>
### Field and Explanation

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool Minimum*</td>
<td>Threshold, when number of available serial numbers drops below, an automatic serial number import is activated via timer and the pool of serial numbers will be filled up with number of serial numbers corresponding to the Pool Buffer (requested) but not more than to the Pool Maximum.</td>
</tr>
<tr>
<td>Poll Maximum*</td>
<td>Maximum size of buffer to which the pool is filled up.</td>
</tr>
<tr>
<td>Pool Buffer*</td>
<td>Size of Buffer. The number of serial numbers buffered by the PLM at a request.</td>
</tr>
</tbody>
</table>

**See also**
- The edit GTINNumbers screen [47]
- Adding GTIN [48]

### 10.2.7 Editing values of a PPN

Previously created PPNs can be edited afterwards. Go to the Edit PPNumbers frame at the edit PPNNumbers screen.

1. Double click a PPN at the edit PPNNumber screen to edit the corresponding PPN.
   
   The following window appears:

2. You can edit the fields 'Rank', 'Pool Minimum', 'Pool Maximum', 'Pool Buffer' and 'Prefix' by clicking the fields next to it.

### 10.2.8 Create Serial Number Ranges

In the Section 10.2.3 you have seen how to import serial numbers from an ERP system. In this section you will see how you can create your own serial numbers.
10.2.8.1 Create Gtin/Ntin SerialNumber Ranges

Serial Number Management > Create SerialNumber Ranges (Gtin/Ntin)

1. Choose the desired Gtin/Ntin for the specified rank.
2. Define the start value and the quantity.
3. Click the create button to begin with the generation.

10.2.8.2 Create SSCC SerialNumber Ranges

Serial Number Management > Create SerialNumber Ranges (SSCC)

1. Choose the desired SSCC for the specified rank.
2. Define the start value and the quantity.
3. Click the create button to begin with the generation.

10.2.8.3 Create PPN SerialNumber Ranges

Serial Number Management > Create SerialNumber Ranges (PPN)

1. Choose the desired PPN for the specified rank.
2. Define the start value and the quantity.
3. Click the create button to begin with the generation.

10.3 SSCCNumbers

- This menu item is available only when a module for SSCC numbers is installed.
In this chapter it is described how to:
  - Add new SSCC
  - Request serial numbers for SSCC
  - Edit values of SSCC
10.3.1 The edit SSCCNumbers screen

Management > Serialnumber Management > edit GTINNumbers

10.3.2 Adding SSCC

In order to generate or request serial numbers, a SSCC (or GTIN) must be defined. The pool sizes define the threshold of the serial number ranges. The pool buffer is used by the PLM to reserve a set of serial numbers during production.

Management > Serialnumber Management > edit SSCCNumbers (add SSCCNumbers)

At the SSCCNumbers dialog you can edit the following fields (Fields with a * are mandatory):

**Table: SSCC details**

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Prefix</td>
<td>6-12 digit numeric value</td>
</tr>
<tr>
<td>Pack ID</td>
<td>SSCC (14 digit numeric value)</td>
</tr>
<tr>
<td>EPC Hexadecimal</td>
<td>The EPC Hexadecimal field provides an optional value for this SSCC. It includes the same information as the SSCC + the filter value specified by GS1. The serial number part of the Hex will be ignored.</td>
</tr>
<tr>
<td>Rank</td>
<td>Corresponding rank 1-8</td>
</tr>
</tbody>
</table>
# Serial Number Management

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pool Minimum*</td>
<td>Threshold, when number of available serial numbers drops below, an automatic serial number import is activated via timer and the pool of serial numbers will be filled up with number of serial numbers corresponding to the Pool Buffer (requested) but not more than to the Pool Maximum.</td>
</tr>
<tr>
<td>Pool Maximum*</td>
<td>Maximum size of buffer to which the pool is filled up.</td>
</tr>
<tr>
<td>Pool Buffer*</td>
<td>Size of Buffer. The number of serial numbers buffered by the PLM at a request.</td>
</tr>
</tbody>
</table>

## 10.3.3 Requesting SNs for SSCC

You can import serial numbers from an ERP system or use generated serial numbers at the PSM. To import / generate serial numbers go to the following screen:

1. Select a SSCC number from the scroll down menu at the corresponding area (SSCC Request).
   - The screen looks as follows:

   ![SSCC Request Screen](image1.png)

2. Enter the quantity of serial numbers to be requested or press **fill numbers** to fill the actual number of pool maximum into the field ‘Quantity’.

3. Click **fill numbers** to generate serial numbers internally.

   ![SSCC Request Screen](image2.png)
### 10.3.4 Editing values of a SSCC

Previously created SSCCs can be edited afterwards. Go to the edit SSCCNumbers frame at the edit SSCCNumbers screen (see also chapter [The edit SSCCNumbers screen \(\rightarrow\) 53]):

Management > Serialnumber Management > edit GTINNumbers

1. Double click a SSCC at the edit SSCCNumbers screen to edit the corresponding SSCC.

   The following window appears:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Prefix</td>
<td>111111</td>
</tr>
<tr>
<td>EPC Hexadecimal</td>
<td>add</td>
</tr>
<tr>
<td>Rank</td>
<td>2</td>
</tr>
<tr>
<td>Pool Minimum</td>
<td>100</td>
</tr>
<tr>
<td>Pool Maximum</td>
<td>2000</td>
</tr>
<tr>
<td>Pool Buffer</td>
<td>20</td>
</tr>
</tbody>
</table>

   You can edit the fields ‘EPC Hexadecimal’, ‘Rank’, ‘Pool Minimum’, ‘Pool Maximum’ and ‘Pool Buffer’ by clicking the fields next to it (See chapter [Adding SSCC \(\rightarrow\) 53]). Type in the new values, and save the changes by clicking save.

   The Company Prefix is only editable at creation of a new SSCC.

### 10.4 Automatic Serial Number Request

When the count of available serial numbers drops below pool minimum an automatic serial number import is activated via timer, the pool of serial numbers will be filled up (requested) to the pool maximum. For timer settings see chapter [Module Trigger via Timer \(\rightarrow\) 64].

### 10.5 Import Serial Number for Product (China Coding)

1. You can import serial numbers for assignment to a specific product and rank. The serial numbers are then assigned to the product at the database.

   See the following screen:

   Management > Serialnumber Management > import Serialnumbers > import Serialnumbers for Product

2. Select the product name at the scroll down menu next to ‘Productname’.

3. Choose the rank at the scroll down menu next to ‘Rank’.

4. Enter the quantity of serial numbers into the input field next to ‘Quantity’.

5. Click request to request the serial numbers.
10.6 Serial Number Overview

At the serial number overview you see the amount of available serial numbers (‘Available’), start- (‘Range Start’) and end (‘Range End’) number per product, GTIN or order. The last used number is shown under ‘Current’.

Management > Serialnumber Management > Serialnumbers List Overview

10.7 Serial Number List Overview

At the serial number list overview you see the amount of available (‘available’) and used (‘used’) serial numbers from a list, belonging to an AI, a rank or an order.

Management > Serialnumber Management > Serialnumbers List Overview
11 System Settings

If additional modules are installed along with the PSM core version the settings menu will be extended by an additional ‘ModuleSettings’ menu which will show the individual settings each module provides. For the specific ‘ModuleSettings’ please refer to the corresponding module manual. All general system settings can be found under Settings > SystemSettings:

Settings > Systemsettings

The buttons Order Export and Order Import at the screen above are shown only if a module for order export and a module for order import are installed.

11.1 System Information

The system Information shows the version of the installed PSM, the connected database, the ApplicationServer the PSM runs on, and the installed modules, if any.

Settings > Systemsettings > System Information

11.2 General Settings: Language

Settings > Systemsettings > general settings

Click the field below ‘language’. Select another language from the scroll down menu. After choosing another language click save at the bottom of the screen to save the settings.

11.3 E-Mail Notification

Preconditions

To define the e-mail account, pre-settings have to be made at the Glassfish Console. See PSM Installation Guide.

Setup and editing of the recipients and the according message codes is done in the PSM.
1. Go to Settings > Systemsettings > E-Mail Notification Settings

See the following screen:

2. Click add to add an email address. At the following window enter an email address.

3. Enter the message codes to send e-mail notification if an event occurs (see table below). Separate the Message codes by comma, e.g. 99000, 99001, ...

When an e-mail is sent, a log entry will be created with message code 91024 (sent) or if it’s not sent 91025 (could not be sent).

11.4 Active Directory Settings

This setting allows you to activate / deactivate Active Directory.

To use ActiveDirectory, a custom JNDI Resource has to be setup in the Glassfish Admin Console. See PSM Installation Guide.
12 Settings for all Lines

In the menu Settings > Settings for all lines, global systems settings for all lines can be selected. This is an alternative to defining these settings with the "DEFAULT"-line in PLM (see PLM manual for more information).

12.1 Serial Number Management

If this checkbox is activated, the lines will use serial number ranges that are imported from a Level 4 system; if it is deactivated, PLMs will generate own serial number ranges.

12.2 Password and Login Settings

This menu allows displaying and modifying rules for Auto Login and password validity and history for the PLM user management.

12.2.1 Active Directory Settings

This menu allows displaying and modifying Active Directory settings for the PLM user management.
In this menu, the default rank descriptions used in PLM and PSM can be modified
13 Log Entries (A-1.11)

This feature allows to view all log entries (Audit Trail) made by any line PLM and PSM are connected to.

1. Click Log Entries, the following screen appears:

   ![Log Entries Screen](image)

   **Log Entries**

   At the ‘Log Entries’ screen all entries are shown. To search some log data click the field below ‘Search’ and enter the word you are looking for, e.g. “logged”.

   Then you get a list with all entries containing the word logged in the message text. See below:

   ![Log Entries Search](image)

   **Log Entries (Search entry)**

   - It is also possible to filter the results by using the scroll down menus: ‘Type’, ‘User’ or ‘Line’. Select the items to filter the search.
   - Additionally you can restrict the time frame; click on the fields ‘from’ and ‘until’ and select the start and end time.

   Exporting or printing the actually shown entries as report is possible by clicking the corresponding buttons below the search fields. After clicking, the print or the save/open dialog box appears.
## 14 Appendix

### 14.1 PSM messages and e-mail notification

Table: PSM messages and e-mail notification

<table>
<thead>
<tr>
<th>PSM Message Codes</th>
<th>Event</th>
<th>Email Notification available</th>
</tr>
</thead>
<tbody>
<tr>
<td>91000</td>
<td>SNImport successfull</td>
<td></td>
</tr>
<tr>
<td>91001</td>
<td>SNImport failed</td>
<td>x</td>
</tr>
<tr>
<td>91002</td>
<td>OrderExport OrderUnits successfull</td>
<td>x</td>
</tr>
<tr>
<td>91003</td>
<td>OrderExport OrderUnits failed</td>
<td>x</td>
</tr>
<tr>
<td>91004</td>
<td>SNImportService Webservice called</td>
<td>x</td>
</tr>
<tr>
<td>91005</td>
<td>OrderExport Timer checked for OrderResults to export</td>
<td>x</td>
</tr>
<tr>
<td>91006</td>
<td>SNImport Timer checked for SN to import</td>
<td>x</td>
</tr>
<tr>
<td>91007</td>
<td>OrderImport success</td>
<td>x</td>
</tr>
<tr>
<td>91008</td>
<td>OrderImport failed</td>
<td>x</td>
</tr>
<tr>
<td>91009</td>
<td>OrderImport Timer checked for Orders to import</td>
<td>x</td>
</tr>
<tr>
<td>91010</td>
<td>DataArchiveTimer checked for Data to archive</td>
<td>x</td>
</tr>
<tr>
<td>91011</td>
<td>Product Import Timer checked for Products to import</td>
<td>x</td>
</tr>
<tr>
<td>91012</td>
<td>Data Archive Orders success</td>
<td>x</td>
</tr>
<tr>
<td>91013</td>
<td>Data Archive Orders failed</td>
<td>x</td>
</tr>
<tr>
<td>91014</td>
<td>Product Import success</td>
<td>x</td>
</tr>
<tr>
<td>91015</td>
<td>Product import failed</td>
<td>x</td>
</tr>
<tr>
<td>91016</td>
<td>OrderExport OrderUnit Hierarchy export success</td>
<td>x</td>
</tr>
<tr>
<td>91017</td>
<td>OrderExport OrderUnit Hierarchy export failed</td>
<td>x</td>
</tr>
<tr>
<td>91018</td>
<td>OrderImportService WebService called</td>
<td>x</td>
</tr>
<tr>
<td>91019</td>
<td>ProductImportService WebService called</td>
<td>x</td>
</tr>
<tr>
<td>91020</td>
<td>OrderExportService WebService called</td>
<td>x</td>
</tr>
<tr>
<td>91021</td>
<td>Data Archive LogEntries success</td>
<td>x</td>
</tr>
<tr>
<td>91022</td>
<td>Data Archive LogEntries failed</td>
<td>x</td>
</tr>
<tr>
<td>91023</td>
<td>Timer could not be executed</td>
<td>x</td>
</tr>
<tr>
<td>91024</td>
<td>Email Notification sent</td>
<td>x</td>
</tr>
<tr>
<td>91025</td>
<td>Email Notification Error (could not be sent)</td>
<td>x</td>
</tr>
<tr>
<td>91026</td>
<td>OrderStateService WebService called</td>
<td>x</td>
</tr>
<tr>
<td>91027</td>
<td>LineService WebService called</td>
<td>x</td>
</tr>
<tr>
<td>91028</td>
<td>LineService WebService fault</td>
<td>x</td>
</tr>
<tr>
<td>91029</td>
<td>OrderExportService WebService fault</td>
<td>x</td>
</tr>
<tr>
<td>91030</td>
<td>OrderImportService WebService fault</td>
<td>x</td>
</tr>
<tr>
<td>91031</td>
<td>OrderStateService WebService fault</td>
<td>x</td>
</tr>
<tr>
<td>91032</td>
<td>ProductImportService WebService fault</td>
<td>x</td>
</tr>
<tr>
<td>91033</td>
<td>SNImportService Webservice fault</td>
<td>x</td>
</tr>
<tr>
<td>91034</td>
<td>OrderState changed success</td>
<td>x</td>
</tr>
<tr>
<td>91035</td>
<td>OrderState change failed</td>
<td>x</td>
</tr>
<tr>
<td>91036</td>
<td>OrderUnit SENT State changed success</td>
<td>x</td>
</tr>
<tr>
<td>91037</td>
<td>OrderUnit SENT State changed failed</td>
<td>x</td>
</tr>
<tr>
<td>99000</td>
<td>PSM started</td>
<td>x</td>
</tr>
<tr>
<td>990001</td>
<td>PSM stopped</td>
<td>x</td>
</tr>
<tr>
<td>PSM Message Codes</td>
<td>Event</td>
<td>Email Notification available</td>
</tr>
<tr>
<td>-------------------</td>
<td>--------------------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>91100</td>
<td>SCCC NumberRange successfully activated</td>
<td></td>
</tr>
<tr>
<td>91101</td>
<td>SCCC NumberRange successfully deactivated</td>
<td></td>
</tr>
<tr>
<td>91102</td>
<td>SCCC NumberRange could not be activated</td>
<td></td>
</tr>
<tr>
<td>91103</td>
<td>SCCC NumberRange could not be deactivated</td>
<td></td>
</tr>
<tr>
<td>91104</td>
<td>GTIN NumberRange successfully activated</td>
<td></td>
</tr>
<tr>
<td>91105</td>
<td>GTIN NumberRange successfully deactivated</td>
<td></td>
</tr>
<tr>
<td>91106</td>
<td>GTIN NumberRange could not be activated</td>
<td></td>
</tr>
<tr>
<td>91107</td>
<td>GTIN NumberRange could not be deactivated</td>
<td></td>
</tr>
<tr>
<td>91108</td>
<td>SCCC Number successfully activated</td>
<td></td>
</tr>
<tr>
<td>91109</td>
<td>SCCC Number successfully deactivated</td>
<td></td>
</tr>
<tr>
<td>91110</td>
<td>SCCC Number could not be activated</td>
<td></td>
</tr>
<tr>
<td>91111</td>
<td>SCCC Number could not be deactivated</td>
<td></td>
</tr>
<tr>
<td>91112</td>
<td>GTIN Number successfully activated</td>
<td></td>
</tr>
<tr>
<td>91113</td>
<td>GTIN Number successfully deactivated</td>
<td></td>
</tr>
<tr>
<td>91114</td>
<td>GTIN Number could not be activated</td>
<td></td>
</tr>
<tr>
<td>91115</td>
<td>GTIN Number could not be deactivated</td>
<td></td>
</tr>
<tr>
<td>91116</td>
<td>AI saved</td>
<td>x</td>
</tr>
<tr>
<td>91117</td>
<td>AI could not be saved</td>
<td>x</td>
</tr>
<tr>
<td>91118</td>
<td>AI could not be saved</td>
<td>x</td>
</tr>
<tr>
<td>91119</td>
<td>AI could not be saved</td>
<td>x</td>
</tr>
<tr>
<td>91120</td>
<td>AI deactivated</td>
<td>x</td>
</tr>
<tr>
<td>91121</td>
<td>AI could not be deactivated</td>
<td>x</td>
</tr>
<tr>
<td>92000</td>
<td>SystemSetting saved</td>
<td>x</td>
</tr>
<tr>
<td>92001</td>
<td>SystemSetting could not be saved</td>
<td>x</td>
</tr>
<tr>
<td>92002</td>
<td>ModuleSetting saved</td>
<td>x</td>
</tr>
<tr>
<td>92003</td>
<td>ModuleSetting could not be saved</td>
<td>x</td>
</tr>
</tbody>
</table>

Appendix 63
14.2 Module Options

14.2.1 Module Trigger via Timer

It is possible to trigger each module (Data Archiving, Order Export, Order Import, Product Import and SerialNumber Import) automatically via timer. Each timer can be activated / deactivated and a schedule can be set for the timer.

Settings > Systemsettings > (Module)

In the following table you find valid attributes, descriptions and examples for the timer configuration:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
<th>Default Value</th>
<th>Allowed Values</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>second</td>
<td>1-59 (second)</td>
<td>0</td>
<td>0 to 59</td>
<td>Second</td>
<td>second=&quot;30&quot;</td>
</tr>
<tr>
<td>minute</td>
<td>1-59 (minute)</td>
<td>0</td>
<td>0 to 59</td>
<td>Minute</td>
<td>minute=&quot;15&quot;</td>
</tr>
<tr>
<td>hour</td>
<td>1-23 (hour)</td>
<td>0</td>
<td>0 to 23</td>
<td>Hour</td>
<td>hour=&quot;13&quot;</td>
</tr>
</tbody>
</table>
### 14.3 User Rights Table

This table lists all user rights and shows which actions the user (PSM Administrator, Manager or Viewer) can perform.

**Default Password**

The default password is: "000"

**Table: PSM User Rights**

<table>
<thead>
<tr>
<th>User Right</th>
<th>Description</th>
<th>PSM Administrator</th>
<th>Manager</th>
<th>Viewer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>accessPSA</td>
<td>User may access PSM web interface</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>isSupervisor</td>
<td>User has supervisor rights</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>System Settings</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayEditModuleSettings</td>
<td>User may change PSM module settings</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td>mayChangeEmailNotificationSettings</td>
<td>User may change email - Notification Settings</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td>mayChangeActiveDirectorySettings</td>
<td>User may change Active Directory Settings</td>
<td>yes</td>
<td>no</td>
<td>no</td>
</tr>
<tr>
<td><strong>AI Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayAddAIs</td>
<td>User may add new application identifiers</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>User Right</td>
<td>Description</td>
<td>PSM Administrator</td>
<td>Manager</td>
<td>Viewer</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------</td>
<td>-------------------</td>
<td>---------</td>
<td>--------</td>
</tr>
<tr>
<td>mayEditAIs</td>
<td>User may edit new application identifiers</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeactivateAIs</td>
<td>User may activate/deactivate application identifiers</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td><strong>Order Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayAddOrders</td>
<td>User may create new orders</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditOrder</td>
<td>Button visible: User may create and edit orders</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>maySeeButtonOrderMove</td>
<td>Button visible: User may enter the move order menu</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayResetOrder</td>
<td>Button visible: User may reset status of orders</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayRunTestProduction</td>
<td>User may access Test Production Generator in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayExportOrders</td>
<td>User may export Orders to ERP System</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteOrders</td>
<td>User may delete workorders</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td><strong>Product Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayAddProducts</td>
<td>User may add new products</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditProducts</td>
<td>Button visible: User may create and edit products</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteProducts</td>
<td>User may delete products</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td><strong>Serial number Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayAddGTINNumbers</td>
<td>User may register new GTIN Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditGTINNumbers</td>
<td>User may edit GTIN Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAddProdCodeNumbers</td>
<td>User may register new ProdCode Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditProdCodeNumbers</td>
<td>User may edit existing ProdCode Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAddSSCCNumbers</td>
<td>User may register new SSCC Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditSSCCNumbers</td>
<td>User may edit existing SSCC Numbers in PSM</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayImportSerialNumbers</td>
<td>User may import serial numbers</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td><strong>Line Management</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mayAddLines</td>
<td>User may add new lines</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditLines</td>
<td>User may edit lines</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteLines</td>
<td>User may delete lines</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAddLineformat</td>
<td>User may add lineformat</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAssignLineformat</td>
<td>User may add lineformat to Order</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteLineformat</td>
<td>User may delete lineformat</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAddLineSettings</td>
<td>User may add linesettings</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditLineSettings</td>
<td>User may edit linesettings</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteLineSettings</td>
<td>User may delete linesettings</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
</tbody>
</table>

<p>| <strong>User Management</strong>        |                                                       |                   |         |        |</p>
<table>
<thead>
<tr>
<th>User Right</th>
<th>Description</th>
<th>PSM Administrator</th>
<th>Manager</th>
<th>Viewer</th>
</tr>
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<tbody>
<tr>
<td>mayAddUsers</td>
<td>User may add Users</td>
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<td>yes</td>
<td>no</td>
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<tr>
<td>mayChangeUsers</td>
<td>User may change User settings</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteUsers</td>
<td>User may delete Users</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayAddGroups</td>
<td>User may add groups</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayEditGroups</td>
<td>User may edit groups</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td>mayDeleteGroups</td>
<td>User may delete groups</td>
<td>yes</td>
<td>yes</td>
<td>no</td>
</tr>
<tr>
<td><strong>Log Entries</strong></td>
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<tr>
<td>mayPrintAuditTrail</td>
<td>User may export audit trail via Printer</td>
<td>yes</td>
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<td>yes</td>
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<tr>
<td>mayExportAuditTrailAsExcel</td>
<td>User may export audit trail as Excel file</td>
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<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>mayExportAuditTrailAsPDF</td>
<td>User may export audit trail as PDF file</td>
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</tbody>
</table>
### Glossary

**AI**
- GS1 Application Identifier

**Bundle**
- A bundle is a packaging unit at the aggregation process. It consists of several items. It is usually aggregated to a case or directly to a pallet.

**Case**
- A case is a packaging unit at the aggregation process. It consists of several items or bundles. It is usually aggregated to a pallet.

**EPC**
- An Electronic Product Code (EPC) is a universal identifier that gives a unique identity to a specific physical object.

**ERP**
- Enterprise Resource Planning; planning the use of resources within an enterprise with the aid of software (e.g., SAP)

**ERP-System**
- Enterprise Resource Planning System (typically order transaction)

**GS1**
- Global Standards One. GS1 is dedicated to the design and implementation of global standards and solutions to improve the efficiency and visibility of supply and demand chains globally and across sectors. The GS1 system of standards is the most widely used supply chain standards system in the world.

**GTIN**
- Global Trade Item Number

**Item**
- An item is the smallest unit at the aggregation process. This can be a carton or a blister. It is usually aggregated to a bundle or directly to a shipping case.

**JNDI**
- The Java Naming and Directory Interface (JNDI) is a Java API for a directory service that allows Java software clients to discover and look up data and objects via a name.

**Pallet**
- A pallet is a packaging unit at the aggregation process. It consists of several cases.

**PCE**
- Pharmacontrol Electronic GmbH

**PLM**
- Pilot Line Manager

**PSM**
- Pilot Site Manager

**Rank**
- At each aggregation rank, unambiguous assignment of units to parent-child aggregation levels is done

**SOAP**
- Simple Object Access Protocol is a protocol specification for exchanging structured information in the implementation of web services in computer networks.

**SSCC**
- Serial Shipping Container Code maintained by GS1

**Unit**
- A unit is the result of an aggregation level. The term unit is used for an item, a bundle, a shipping case or a pallet.
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