

Stockit

V1.6 Update Notes

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Chapter 1. Getting Started

Introduction

Stockit version 1.6 provides new and additional features to those available in the previous version of the product. It also consolidates all fixes for problems reported since the previous update release. The changes made are listed in the following chapters.

Installing the New Version

This update is provided as a self-unpacking installation program that will automatically start the **Setup** program needed to install the modified files. Installation will start automatically once download from the Internet is complete or from the installation CD.

Backup your Database first

Although installing the new version does not affect your existing database it is highly recommended that you make a separate backup copy of your database to another location before you install the new version.

Operating System Support for Windows 7

Stockit version 1.6 is now fully supported under Windows 7.

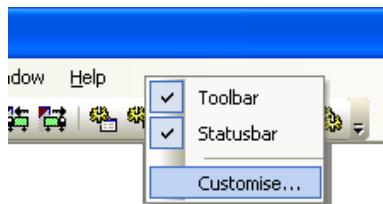
Note: No versions of Stockit earlier than version 1.6 can be supported under the Windows 7 operating system.

Chapter 2. Functional Changes

Updated User Interface

Customisable Toolbars and Shortcut keys

Clicking the **Customise...** button on the Stockit furniture (the edge of the program window) or from the **Tools** menu will open up the **Customise** dialog.



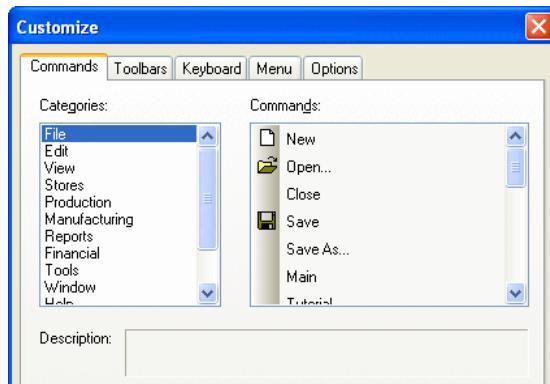
From this dialog, you can customise various aspects of the Stockit program, for example, shortcut keys, toolbar buttons or tooltips.

Customise dialog

The **Commands** dialog is used to add any command used in Stockit onto a Toolbar or menu.

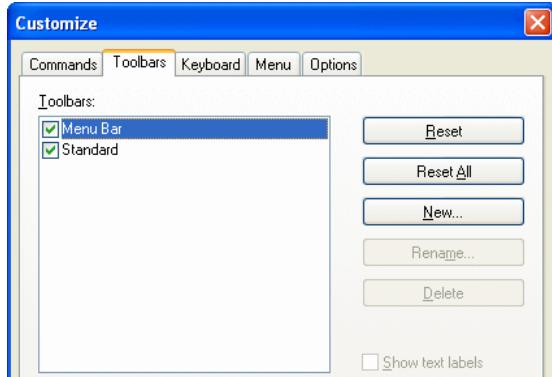
Within the Commands tab, there is a list of command **Categories** each of which will display a list of commands when selected. The **All Commands** item (at the bottom of the **Categories** list) will show all commands in all categories. Selecting a category, lists all the commands defined in that category.

Selecting a command will display a description of its function. A selected command may be dragged, by pressing and holding down the left-hand mouse button, and dropped on to any visible toolbar or menu. Dragging the command over a menu bar item will cause the corresponding menu to drop down allowing the command to be placed within that menu. The same command may be placed on more than one toolbar or menu.



Customising Toolbars

Within the **Toolbars** tab you may change toolbar visibility, add new toolbars, delete existing custom toolbars and reset default toolbars. A new custom toolbar will appear, 'floating' over the application main window, ready to have your chosen commands dragged on to it. Alternatively click **Cancel** to abort the creation of a new toolbar.



How to create a new user defined Toolbar

The Toolbar Name dialog appears when the **New** button on the Toolbars tab is clicked. Enter the name of the new toolbar then click **OK** to confirm you wish to create the toolbar.



Shortcut Keys

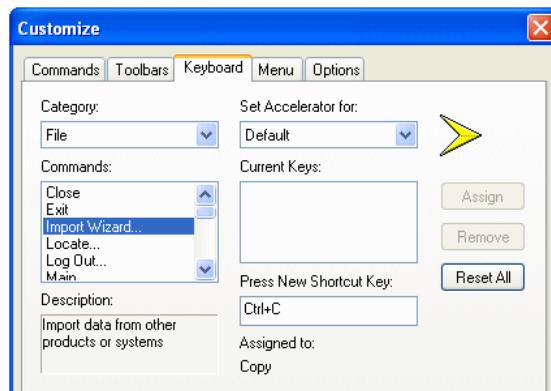
Shortcut keys offer an alternative method of performing actions for users who prefer the keyboard to the mouse. Any command may be assigned to a given key or keyboard combination. The command can then be performed simply by entering the assigned shortcut key.

The application comes with a predefined set of Shortcut Keys for its most commonly used operations. These are however, only a default set and may be changed, removed or added to according to your own personal preferences using the **Keyboard** tab on the **Customise** dialog.

If a command, to which a Shortcut Key is assigned, is available from a menu, the Shortcut Key combination is displayed alongside the option in the menu. Also, optionally Shortcut Keys can be shown in the tooltips, displayed for toolbar buttons.

Modifying Shortcut Keys using the Keyboard dialog

The Keyboard dialog allows you to query, remove or add to the Shortcut Keys currently assigned to commands.



The **Category:** list, in the top left of the dialog, allows you to restrict the list of commands shown to only those in the chosen category. Select **All Commands** from the drop down list to see a complete list.

The **Commands:** list shows the commands to which you can assign a shortcut key. The currently selected command is shown in the box at the top of the list.

The **Description** box displays a brief description of the currently selected command.

The **Current Keys** list shows any shortcuts currently assigned to the command. You can assign more than one shortcut to the same command, but you cannot assign the same shortcut to different commands. Clicking the **Remove** button removes the currently selected shortcut.

You can also identify a command by its currently assigned shortcut. To do this, type the key or key combination (**Ctrl+C**, for example) into the **Press New Shortcut Key:** box. If a command is assigned, it will be displayed below **Assigned to:** as text.

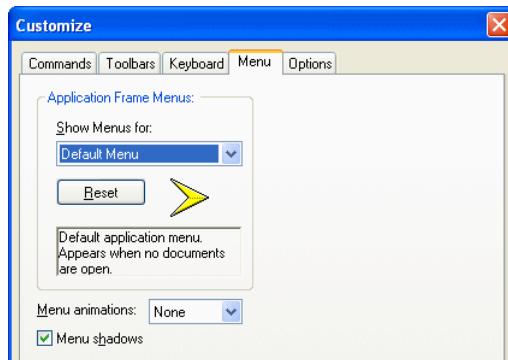
Assigning Shortcut Keys

To assign a shortcut, place the cursor into the box positioned below the prompt **Press New Shortcut: Key**, then press the desired key combination. Clicking the **Assign** button will assign this shortcut key to currently selected command. If the key is already assigned to another command it will be displayed below **Assigned to:**

The **Reset All** button resets all shortcuts to the shortcut defaults.

Customise Menu

Use features on this tab to define how the menus look and to reset them to the default settings.



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Show Menus for: there is a standard set of menus currently in Stockit and this will always be shown as the Default Menu in the drop down list.

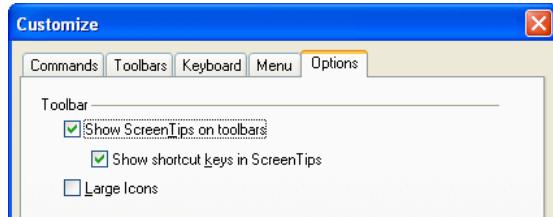
Reset This button will reset the Default Menu back to its original default settings. Any user customisation will be lost.

Menu animations: this allows you to define how the menus are revealed once selected. You can choose Unfold, Slide and Fade as possible options from the drop down list.

Menu shadows this specifies whether or not a menu is displayed with a shadow.

Customise Options

Use this tab to define how the Toolbar will look.



Toolbar

Show ScreenTips on toolbars

This specifies whether or not tooltips are to be shown when the mouse pointer is over toolbar buttons or not.

Show shortcut keys in ScreenTips

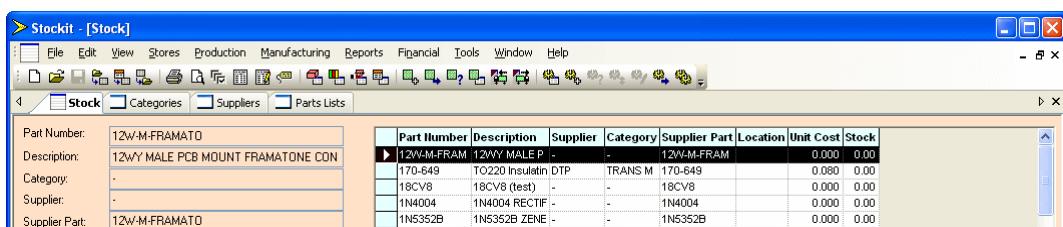
This specifies whether or not the tooltips should include equivalent shortcut keys for toolbar buttons where defined.

Large Icons

This specifies whether or not toolbars should be displayed with the larger size icons.

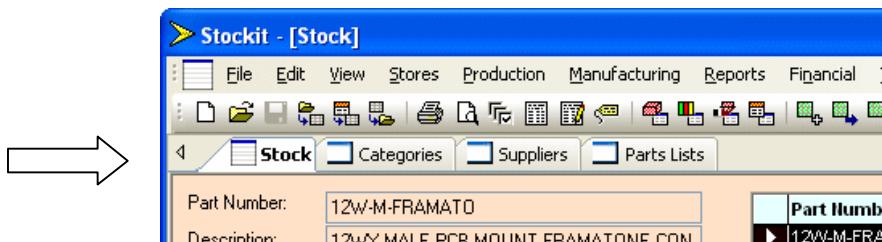
Updated User Interface

The user interface has been updated in several respects.



Tabbed Windows

Tabbed windows have been added for improved speed of access to open forms. The window tabs are displayed across the top of the interface just below the default positions of the menu and toolbars, and show the form name. The current active window, the one at the front, is shown in bold type-face. To move easily between each open form, simply click on the tab to bring it to the front.



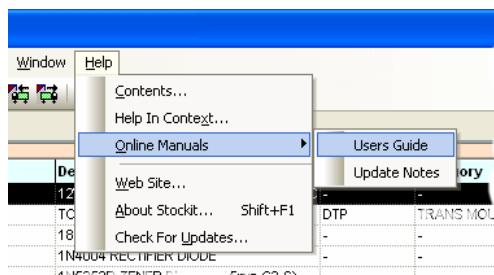
These tabbed windows can be switched off if not required by selecting the **Tabbed Windows** option from the **View** menu. A 'tick' mark will be displayed next to the menu option to indicate whether it is active or not.



By default, tabbed windows will operate with each of the form windows maximised within the application window, but this is not compulsory. The form windows can be switched to a **Cascade** or **Tiled** layout by using the options available on the **Windows** menu.

Easy Access to Users Guides

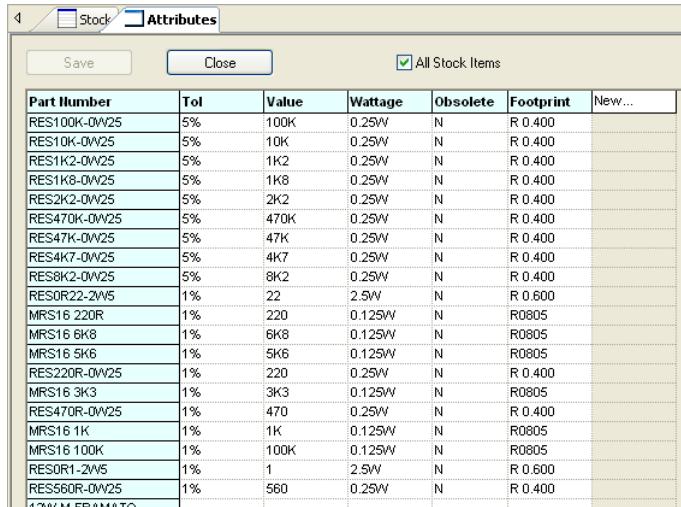
The **Help** menu now includes entries for PDF versions of the **Stockit Users Guide** and **V1.6 Updates Notes**. To access these, simply select the manual required from the sub menu under **Manuals>**. To view these PDF files, you will need the Adobe Acrobat viewer installed. This is available free of charge from www.adobe.com



User Defined Attributes

There is a new **Attributes** table available for Stock items. This can be used in addition, or instead of the three user-defined fields on the Stock form.

The 'key' field used for this form is the Part Number, you can sort by Part Number but you are not able to edit it from here. When a stock item is selected from the Stock form, it will be pre-selected in this form for ease of locating.



The screenshot shows a software window titled "Stock Attributes". At the top right is a checkbox labeled "All Stock Items" which is checked. Below the title bar are two buttons: "Save" and "Close". The main area is a grid table with the following columns: Part Number, Tol, Value, Wattage, Obsolete, Footprint, and New... (header). The grid contains approximately 20 rows of data, mostly for resistor components like RES100K-0V25, RES10K-0V25, etc., with their respective values for Tol, Value, Wattage, and Footprint.

Part Number	Tol	Value	Wattage	Obsolete	Footprint	New...
RES100K-0V25	5%	100K	0.25W	N	R 0.400	
RES10K-0V25	5%	10K	0.25W	N	R 0.400	
RES1K2-0V25	5%	1K2	0.25W	N	R 0.400	
RES1K8-0V25	5%	1K8	0.25W	N	R 0.400	
RES2K2-0V25	5%	2K2	0.25W	N	R 0.400	
RES470K-0V25	5%	470K	0.25W	N	R 0.400	
RES47K-0V25	5%	47K	0.25W	N	R 0.400	
RES4K7-0V25	5%	4K7	0.25W	N	R 0.400	
RES8K2-0V25	5%	8K2	0.25W	N	R 0.400	
RES0R22-2W5	1%	22	2.5W	N	R 0.600	
MRS16 220R	1%	220	0.125W	N	R0805	
MRS16 6K8	1%	6K8	0.125W	N	R0805	
MRS16 5K6	1%	5K6	0.125W	N	R0805	
RES220R-0V25	1%	220	0.25W	N	R 0.400	
MRS16 3K3	1%	3K3	0.125W	N	R0805	
RES470R-0V25	1%	470	0.25W	N	R 0.400	
MRS16 1K	1%	1K	0.125W	N	R0805	
MRS16 100K	1%	100K	0.125W	N	R0805	
RES0R1-2W5	1%	1	2.5W	N	R 0.600	
RES560R-0V25	1%	560	0.25W	N	R 0.400	

Working with Attributes Names

There are two aspects to an attribute; the **attribute name** (Tol, Wattage, Value etc.) and its **value** (100K, 2%, 5%, 0.25W etc.).

To **add** a new **attribute name**, click once on the attribute header **New...** and type the name required, then either press **<Enter>** or select another cell in the grid to accept the name. The name will change to a bold font to show it has been accepted.

To **delete** an Attribute Name (and the column under it plus any assigned values in that column), select the attribute name and press the **** key on the keyboard. The column will be removed.

Editing Attribute Names

Attribute Names can be **edited** by selecting the name and using a **<Ctrl+double-click>**. Edit the name once highlighted then press **<Enter>** to accept it.

Working with Attributes Values

To add a new attribute **value**, click once on the corresponding attribute/stock item cell. Type in the value required. Press **<Enter>** or select another cell to confirm the value. Values can be numeric or alpha characters or a combination of both.

To **edit** a value, use a single click on the cell and type the new value. This will replace the whole value. To modify the existing value, double-click in the cell and use the left and right keys on the keyboard or position the cursor within the text string. Make the edit then press **<Enter>**. The **** and **<Backspace>** keys can also be used to edit the text.

To **delete** an Attribute Value, select the value or multiple-select values and press the **** key on the keyboard. You can also use **<Ctrl+select>** or **<Shift-select>** to pick multiple cells. Once selected, you can delete their values or Paste in new ones.

Using Copy/Paste in the grid cells

Copy and **Paste** can be used to add values into single or multiple cells at the same time. Copied values can be pasted into selected cells in columns and across rows or both. Copied values can be taken from within the Attributes form or from an external source, such as Excel or Notepad for example.

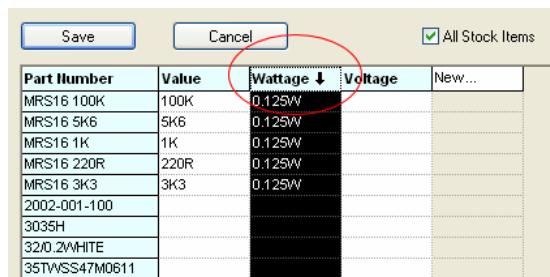
To paste the same value into multiple cells, copy the value required first. Select the cells required in the attribute grid and press the shortcut <Ctrl+V> (Paste) from the keyboard or the **Paste** option from the **Edit** menu.

Undo and Redo in the Attributes form

Undo and **Redo** can be achieved using the shortcut keys <Ctrl+Z> or <Ctrl+Y> and will undo/redo any attribute names or values entered. These two commands are only available in this form. They are only available until the **Save** button is pressed or until the **Close/Cancel** button is pressed. Redo does not remember previous editing sessions, only the current one.

Sorting Columns

You can sort any column by double-clicking on the Attribute header. Double-clicking the first time will sort the list in ascending order, double-clicking it again will sort it in the opposite direction, i.e. descending.



Part Number	Value	Wattage ↓	Voltage	New...
MRS16 100K	100K	0.125W		
MRS16 5K6	5K6	0.125W		
MRS16 1K	1K	0.125W		
MRS16 220R	220R	0.125W		
MRS16 3K3	3K3	0.125W		
2002-001-100				
3035H				
320_2WHITE				
35TWSS47M0611				

Saving Attributes

Once you have finished adding or editing attributes, you must save them. To do this, click the **Save** button at the top of this form. Once pressed, the button will be greyed out and the **Close** button will be active, use this button to close this form.

Before **Save** has been pressed, the **Close** button will show as **Cancel**. Use this to close the Attributes form without saving the attribute names or values from your current session.

All Stock Items uncheck this check box to only show the Stock items which have attributes attached to them. Any stock item that has at least one attribute value will be displayed in this list. To add attributes to items not shown it is necessary to switch back to All Stock Items mode.

Searching by Attribute Names

Unlike the three user-defined fields on the Stock form, the fields in the Attributes table cannot at present be used for searching and filtering of the stock form. This is also the case in the **Report Builder**.

Hyperlink Attributes

A value added for an attribute can be a **hyperlink** containing a reference to a **web page**, an **external document** or an **executable** program, this referenced item can exist on the Internet.

A **hyperlink** can be specified as a full path e.g. c:\temp\datasheet.pdf or C:\Documents and Settings\All Users\Documents\Stock\part.doc, or can be entered relative to the database location, e.g. documents\datasheet.pdf. Say, for example, you want to view images of your stock items and

your database is located at c:\db, you could set up a folder of image files at c:\db\pictures and then reference them using an attribute with a relative path such as pictures\part.gif.

Part Number	Value	Wattage	Voltage	Hyperlink	Images	New...
MRS16 100K	100K	0.125W		C:\Datasheets\MRS16100K.pdf	pictures\mrs16100k.gif	
MRS16 1K	1K	0.125W				
MRS16 220R	220R	0.125W				
MRS16 3K3	3K3	0.125W				
MRS16 5K6	5K6	0.125W				
170-649						
...						

To activate a hyperlink, position the cursor over the attribute value then press <Ctrl+click>.

For a hyperlink to reference an **executable** program, it must include the .exe extension in the file name which must be reachable by the system, e.g. notepad.exe. The executable can be accompanied by parameters which, if specifying a path to a file, may be a relative path as described above, e.g. excel.exe info\part.xls.

Copying values from the grid

Where a grid is used to displays records, clicking on a row generally selects and highlights the entire row of information. Using the Copy command, or its shortcut key (<Ctrl+C> by default), will copy the entire row of text to the Windows clipboard. If you wish to copy the text from a single field in the record, perhaps to paste into a search or filter elsewhere, right-click over the value and select **Copy Value** from the context menu.



Report Builder Improvements

The **Report Builder** has been enhanced to include three new additional information sources; **Attributes**, **Stock Attributes**, **Parts List Stock Attributes** and **Job Shortages**. These can be selected from the **Select Information From** drop down list as the basis for your report.



Selecting **Attributes** will allow fields from the new Attributes table to be reported for stock items. Using **Stock Attributes** will additionally allow fields from the Stock table to be combined with those from Attributes and reported. The **Parts Lists Stock Attributes** selection will enable you to write out all Stock Attributes associated with a particular Parts List. The **Job Shortages** selection is useful because it allows you to report shortage information combined with additional fields from the Stock table such as current stock level or any of your custom fields.

FIFO Calculation in Update Stock Costs from Goods-In Costs

A new **Average Goods In** calculation has been added to the **Update Stock Costs From Good In Costs** dialog. This will give you an average goods-in value of your current stock based on the **First In First Out principle (FIFO)**.



This is calculated as the average unit cost of just the Goods In records relating to the items still currently in stock, assuming stock is booked out on a First In First Out basis.

For example, if the most recent deliveries of part M3 were:

- 10 on 8th Feb @ £5
- 5 on 6th Feb @ £4
- 20 on 4th Feb @ £3
- 30 on 2nd Feb @ £2
- 50 on 1st Feb @ £1

And the current stock level for M3 is 30, the updated cost would be calculated as:

$$(10 * 5) + (5 * 4) + (15 * 3) \\ \hline 30 = 3.833$$

30

Using this option means the updated cost is not skewed by the cost of the earlier deliveries whose items have been already been issued.

Partial Ordering

On the **New Purchase Order Items** page (on the **Stores** menu), the option to place the purchase orders can now be run selectively with the added option to mark items for individual ordering.

By marking items, you can run partial ordering, for example if some known items are on long lead times.

The screenshot shows the 'New Purchase Order Items' page. On the left, there's a form with fields for Part Number (236-305), Description (1.6mm 3D Low temperature), Qty to Order (2.40), Required Date, Expected Date, Supplier (DTP), and Supplier Part (236-305). Below the form is a 'Notes' area with three buttons: 'Preview Order Form', 'Request Quotes for Items', and 'Place Items as Orders'. To the right is a grid of items with checkboxes. A red box highlights the 'Marked Items Only' checkbox at the bottom left of the grid and the 'Clear Items' button at the bottom right. The grid columns are Part Number, Description, and Supplier.

Part Number	Description	Supplier
2012-JU1-1UJ	0.4 Thermal trip	DTP
<input checked="" type="checkbox"/> 236-305	1.6mm 3D Low temperature heatsink	DTP
230-000	4.0mm low temperature heatsink	DTP
26300SL	Diecast Box	DTP
28M698	25A 50V Bridge Rectifier	DTP
<input checked="" type="checkbox"/> 35TVS2.7WTR11	47Vrd 35V electrolytic	DTP
BULK10-50GS	Internally protected power irrofse	DTP
CLB300GTP	Green low profile LED lens and clip	DTP
CLB300RTP	Red low profile LED lens and clip	DTP
HLMPS3G2	Green LED	DTP
RSCAT01-VB-9-G	rocket switch Green	DTP
TLSR5410	REC Flashing LED	DTP
EXAMPLE-PCB	Speed Controller PCB	FACTORY
EXAMPLE-SUB1	Speed controller bridge assembly	FACTORY
EXAMPLE-SUB2	FET controller	FACTORY
EXAMPLE-SUB3	Switch Assembly	FACTORY
EXAMPLE-SUB4	Terminal Block assembly	FACTORY
EXAMPLE-SUB5	Speed Control PCB with LEDs & FETs	FACTORY
3035H	3x solder Type Spade Connectors	MARSH
C014P1 ACK	7A 28V 3 pin male	MARSH
C014P1 E	7Amp 28V 3 Pin Female	MARSH

Marked Items Only

When 'checked', this option allows you to process only certain items in the form and leave the others to do another time. In the grid there is a corresponding column of checkboxes which are used to mark the items you wish to include. The checkbox at the head of the column will check or uncheck all items in a single action.

With the required items marked, the **Place Items as Orders**, **Request Quotes for Items** and **Clear Items** actions, shown in the box alongside **Marked Items Only**, will only operate on those marked items and leave all unmarked items unaffected.

If the form is closed, any item marked will remain marked when the form is next re-opened.

Clear Items

This option allows you to quickly remove all the purchase items shown, effectively clearing your "shopping list", unless the **Marked Items Only** option is in use in which case only marked items will be cleared.

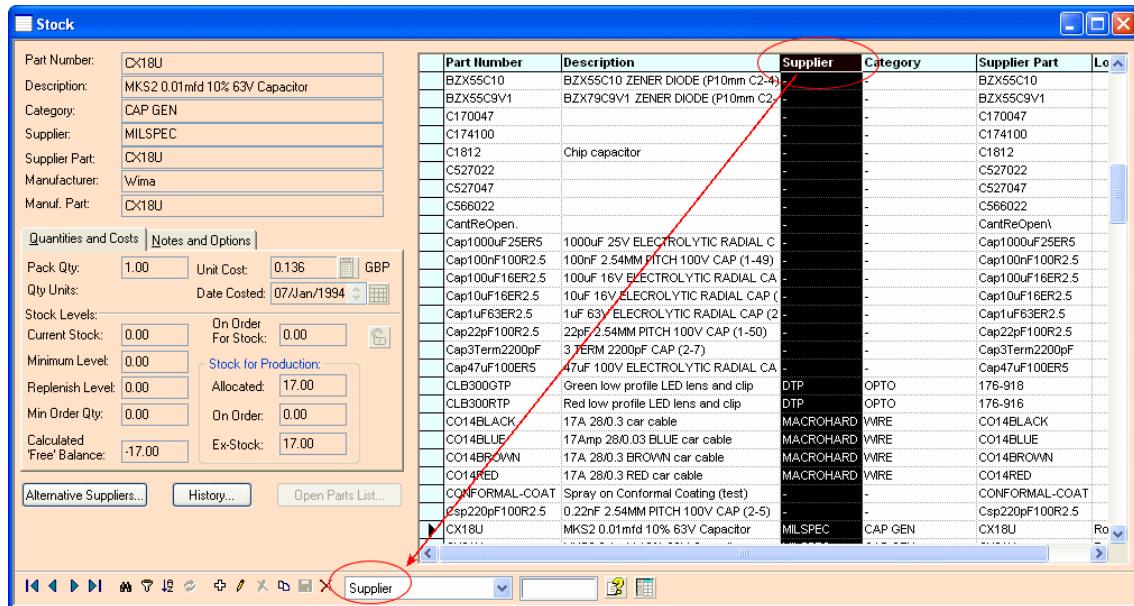
Multiple Partial Orders

It is now possible to add multiple occurrences of the same Part Number to the list of items to be ordered. This will enable you to create separate order quantities of the same item and schedule them for different delivery dates.

Fast Searching Improvements

Priming the Navigation bar

Clicking a column header in the grid will now additionally prime the column as the current search field in the **Navigator Bar**.

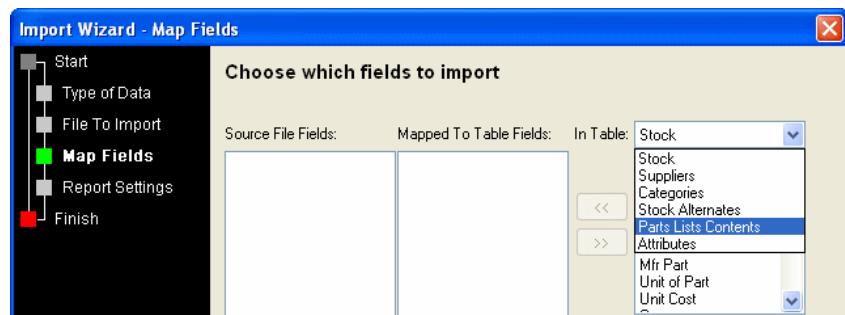


Find Next

Also, having found the first matching record when the search value was typed, it is now possible to find the next and subsequent matching records by typing <Ctrl+Enter> (similar to the **Find Next** button when using the **Search** dialog). This can be useful when searching columns which are not the current sort field.

Additions to the Import Wizard

When using the **Import Wizard**, you can now additionally import data for **Parts Lists** and the new **Attributes** table.



For example, Parts List Contents data showing the fields that can be mapped in the Import Wizard, can be generated using Stockit's Report Builder with the Parts List Contents source setting. A sample Parts List Contents output is shown below:

Parts List: EXAMPLE-PRODUCT		Rev: 1
Created: 10Mar/2009	Notes:	
Description: Speed Controller Box		
Cost: 79.337		
Date Costed: 10Mar/2009		
Part Number	Description	Quantity
	Sub-Assemblies	
EXAMPLE-SUB1	Speed controller bridge assembly	1.00
EXAMPLE-SUB2	FET controller	1.00
EXAMPLE-SUB3	Switch Assembly	1.00
EXAMPLE-SUB4	Terminal Block assembly	1.00
EXAMPLE-SUB5	Speed Control PCB with LEDs & Cables	1.00
FS36P	10mm Insulated Spacer	1.00
		3.433
		4.516
		2.024
		1.869
		24.879
		0.183

Character Increases from 100 to 255

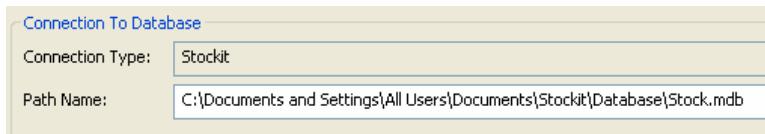
The size of the Ref field in Parts Lists has been increased from 100 to 255 characters. The increase will be automatically performed when you run your existing database in the Version 1.6.

Connection to the Pulsonix PCB Design System

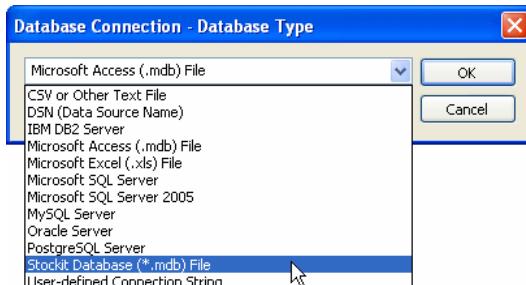
You can now connect Stockit to Pulsonix using the Pulsonix Database Connection option. Using the Attribute fields, you can add Component information to the Stockit database to make your stock records more meaningful. Information such as tolerance, height, wattage, value etc, can be added to the stock item (Part).

How to connect the PDC to a Stockit database

From the **Connection To Database:** options, you need to select the connection type and path to the database.

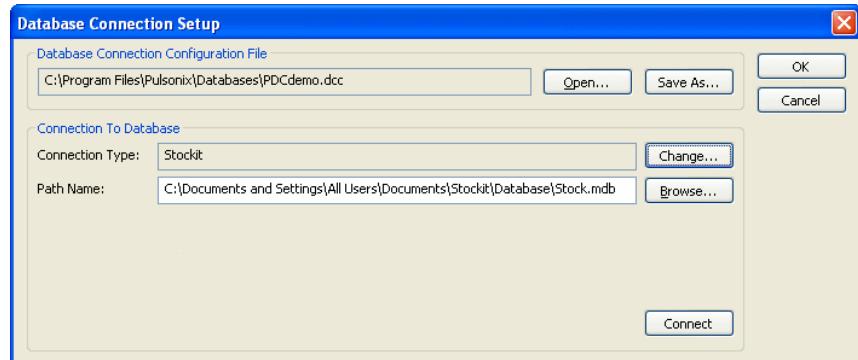


Next to the **Connection Type:** box, select the **Change** button. From the drop down list, select **Stockit Database (*.mdb) file** option.



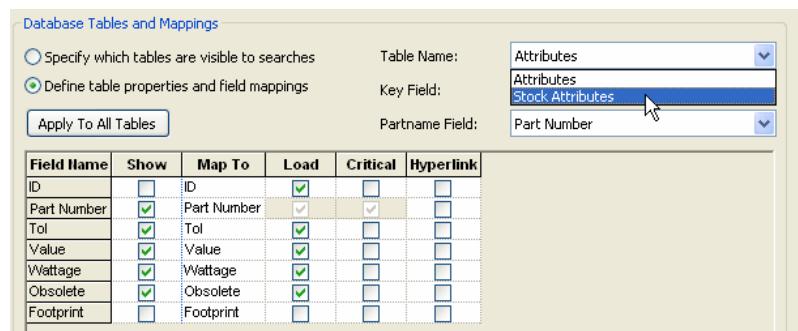
Now select the Stockit database using the **Browse** button to locate it.

Once the database type and location have been established, you will automatically be connected to the database and the relevant tables and fields will be setup automatically. Although you can, if you wish to, restrict which Stockit attributes are copied into your Pulsonix design.

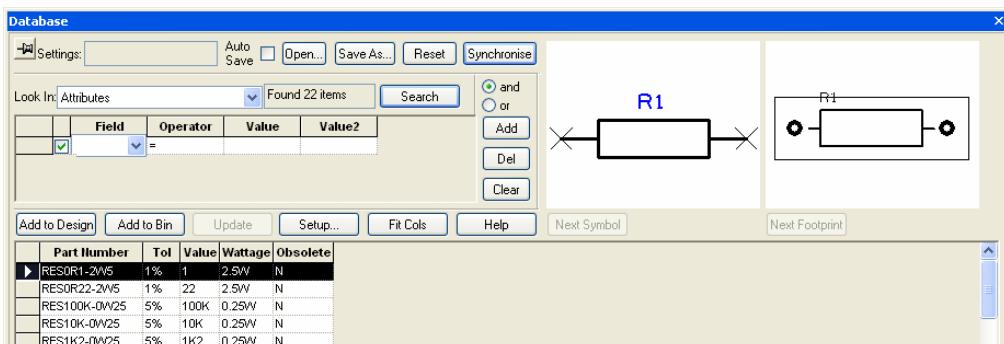


The connection option will display the **Database Tables and Mappings** options. On **Table Name:** select either the **Attributes** or **Stock Attributes** tables depending on your preference of operation. Attributes gives you access to the part number and attributes names/values you have defined. Stock attributes additionally gives you access to the fields defined for the Stock table (except for the three user-defined fields).

Use the mappings to define what you wish to use for Pulsonix search fields in the PDC.



The PDC searcher will now display the fields available for searching:



Extracting Attributes

Attributes and stock values from Stockit can be passed into a Pulsonix design. You can verify which attributes have been used by selecting a component in the design and viewing its **Comp Attribute Properties**.

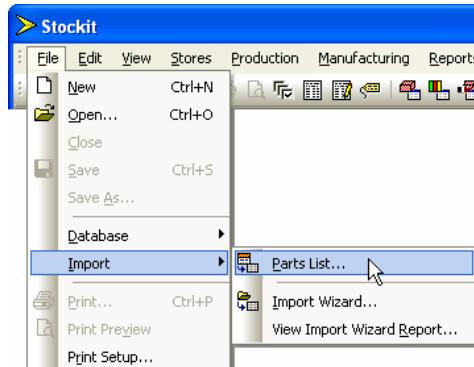
Once in the design, attributes can be extracted using the normal **Report Maker** mechanism.

Creating Stockit format Parts Lists from Pulsonix

In order to run Stockit through a complete purchase cycle, you must create a Stockit Parts List. This is used to pull stock items from the Stockit database and process them using the Stockit option available.

Once in the design, attributes can be extracted using the Pulsonix **Report Maker** mechanism. They can also be compared against their original values in the database using the Pulsonix **Check/Update Against Database** mechanism.

When run, this will create a CSV file suitable for Stockit. To load this into Stockit, from the **File** menu, **Import >**, from the sub-menu, select **Parts Lists**.



Import your parts list; this will then appear on the **Parts Lists form** in Stockit with a corresponding entry in the Stock form.