



WXS

Warehouse Control/Execution Software

User Manual

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Version History

Serial No	Version Number	Writer	Date	Approver
1	Initial Version	Anand Bhagwat	01/15/2021	Robert J. Ward
2	1.0	Anand Bhagwat	02/05/2021	Robert J. Ward



1 Purpose

This document provides instructions on the usage of the WXS Warehouse Control Software.

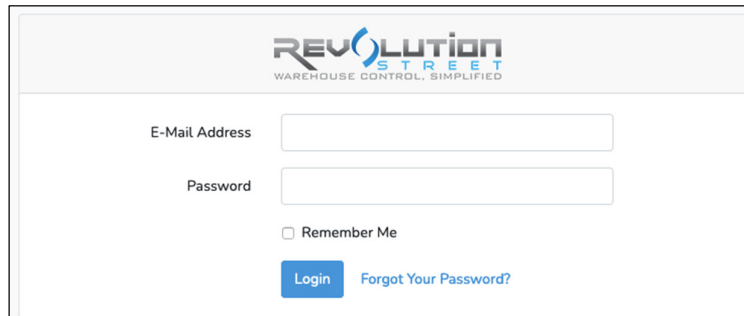
2 Pre-requisites

- Valid login to the WXS Warehouse Control Software. If you do not have one please contact Administrator.
- Modern browser. The application works on Google Chrome, Firefox etc.
- Familiarity with Application

3 Common Icons

- The sign  indicates that the menu item options can expand.
- The sign  indicates that the menu item is expanded. All menu sub items are getting displayed.

4 Login to the application



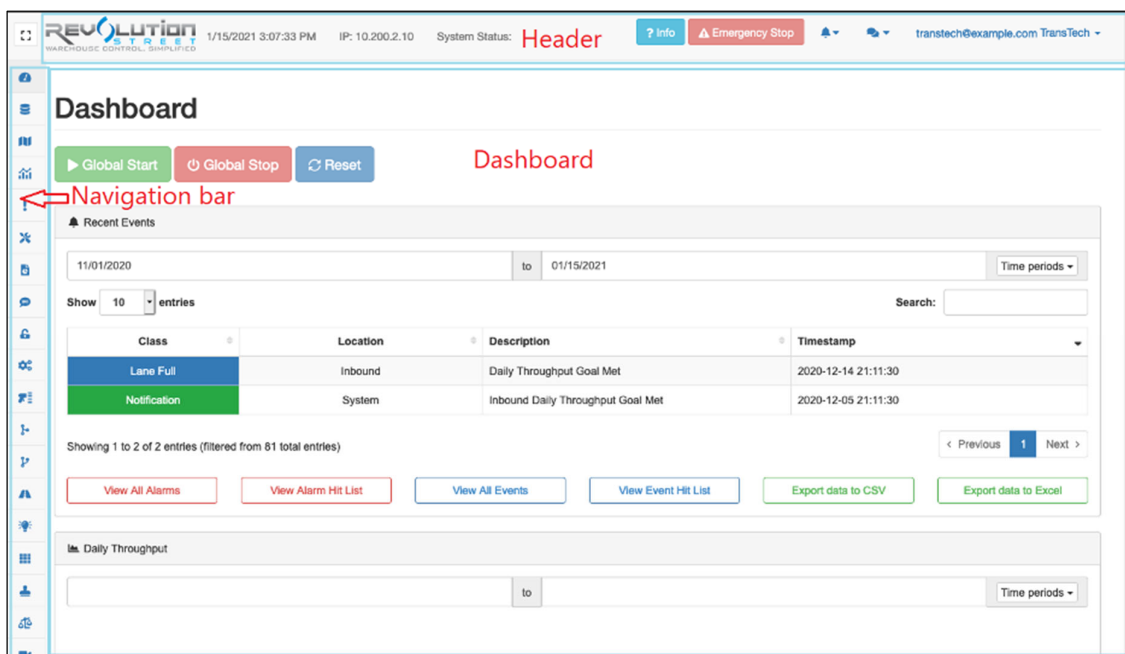
The screenshot shows the login interface for Revolution Street. At the top, the logo 'REVOLUTION STREET' is displayed with the tagline 'WAREHOUSE CONTROL, SIMPLIFIED'. Below the logo, there are two input fields: 'E-Mail Address' and 'Password'. Under the password field is a checkbox labeled 'Remember Me'. At the bottom of the form are two buttons: a blue 'Login' button and a blue 'Forgot Your Password?' link.

- Enter the E-Mail Address. This email address will be same one as the one you received from your System Admin during account creation.
- Enter the Password (your system Admin should provide you with the password)
- If you want the site to remember your login so that you do not have to enter your credentials again next time you visit the site please check the 'Remember Me' checkbox
 - You may also use your browser to securely store your credentials as well
- Press 'Login' to login into the application
- In case you have forgotten your password please click the 'Forgot Your Password' link

Note: In case you are not able to login to application please contact your System Admin

5 Home Page

Once you are successfully logged in to the system you will be on the home page. This page has the following sections as illustrated below. The various sections of the screen are marked in separate colors. These are Header, Navigation Bar and Dashboard.




5.1 Home Page

This area shows the URL, Company logo and other details.

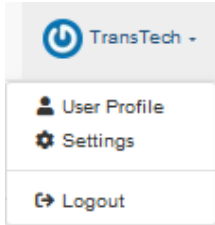
5.2 Header

This shows the follows

- Expand/Collapse button  : Clicking on this button toggles the menu bar between expanded and collapsed
- Company Logo
- Current Date and Time
- IP address of the user
- System Status : This show the status of the system
- Info Button: Clicking on this will take user to the info page.
- Emergency Stop: Clicking on this button will stop the system
- Email of the logged in user

5.2.1 Company dropdown

This has the following options



- User Profile: Clicking on this takes the logged in user to his current profile as shown below

A screenshot of a 'Profile' page. At the top right are buttons for 'Actions', 'Edit', and 'Delete'. The page contains several input fields: 'User name' (TransTech), 'Email' (transtech@example.com), 'Dark Theme' (FALSE), and 'Dashboard Portlets'. Below these are four columns of information: 'First Name' (Trans), 'Last Name' (Tech), 'Phone Number' (+15555555555), and 'User Role' (Administrator). Further down are 'Last Login Date' (02/08/2021 12:01:50 am), 'Last Password Change Date' (mm-dd-yyyy), 'Account status' (Not locked out), and 'Email Confirmed' (TRUE). At the bottom left, it says 'Created: 01/14/2021 08:52:41 am' and 'Updated: 02/08/2021 12:01:50 am'. At the bottom right are buttons for 'Actions', 'Edit', and 'Delete'.

Here the logged in user can view his current profile settings and Edit or perform Actions like 'Resend Email configuration' and 'Lock Account'

- Settings: Clicking this takes the logged in user to settings as shown below

A screenshot of a 'Settings' page. It features three main sections: 'Photo Source' with a dropdown menu showing 'Gravatar', 'Local Timezone' with a dropdown menu showing '(GMT-5:00) America/New_York (Eastern Standard Time)', and 'Dark Mode' with a toggle switch currently set to 'Off'. A blue 'Save' button is located at the bottom left.

Here the logged in user can set the Photo Source, the Local Time zone and toggle whether Dark Mode to On/Off

- Logout: Clicking this will logout the user from the system

5.3 Left Navigation Bar

The left navigation bar at the left of the page will allow you to navigate the site and allow you set various configuration and perform actions.

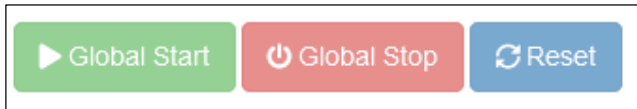
5.4 Dashboard

Dashboard section shows all Alarms, all Alarm Hit list, Events and All Events hit list. This screen also provides a facility to export data in CSV or excel format.

6 Dashboard

The Dashboard has the following sections and is intended to give a quick and summary view of events in the system

6.1 Dashboard Header (Global System Control)



The system control has the following actions

- Global Start: This is used for global start of entire MHE system
- Global Stop: This is used for global stop of entire MHE system
- Reset: This is used for reset of entire MHE system

6.2 Recent Events

This section shows the recent alarms/events list as below (this table shows both Alarms and Events)

The following fields are shown in the list

- Class: The class of the alarm/event: such as Alarm; Warning; Comm Failure; Info; Notification; Jam; Lane Full
- Location: Location of the alarm/event: such as Shipping; Pick Zone
- Description: Description of the alarm/event
- Timestamp: Timestamp of the alarm/event

The events to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can also search for events using the 'Search' box located at the top right of the list

Below the recent event list is sub section consisting of the following

6.2.1 View All Alarms

Clicking on 'View All Alarms' takes the user to the Alarms screen as shown below

The screenshot shows the 'Alarms' screen. At the top, there's a header 'Alarms' with a red exclamation mark icon. Below it, a date range filter is set to '01/21/2021' to '01/21/2021' with a 'Time periods' dropdown. A 'Show 10 entries' dropdown is on the left, and a 'Search:' text box is on the right. The main table has columns: Class, Location, Description, and Timestamp. Below the table, it says 'No data available in table'. At the bottom, there are two buttons: 'Export data to CSV' and 'Export data to Excel'.

This shows the list of events filtered for type where the event is of type Alarm i.e. a list of alarms

The fields shown in list of alarms is same as that in recent event list. Also the same filtering of data, paging, sorting and search is present as on the recent event list

The user can also export the alarms to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

6.2.2 View Alarms Hit List

Clicking on 'View Alarms Hit List' takes the user to the Alarms Hit List screen as shown below

The screenshot shows the 'Alarms Hit List' screen. At the top, there's a header 'Alarms Hit List' with a red exclamation mark icon. Below it, a date range filter is set to '01/21/2021' to '01/21/2021' with a 'Time periods' dropdown. A 'Show 10 entries' dropdown is on the left, and a 'Search:' text box is on the right. The main table has columns: Class, Location, Description, Occurrences, and Timestamp. Below the table, it says 'No data available in table'. At the bottom, there are two buttons: 'Export data to CSV' and 'Export data to Excel'.

This shows the list of events filtered for type where the event is of type Alarm i.e. a list of alarms and then shows the number of occurrences over a given period of time.

The fields shown in list of hit alarms is same as that in recent event list. Also the same filtering of data, paging, sorting and search is present as on the recent event list

The user can also export the hit alarms to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

6.2.3 View All Events

Clicking on 'View All Events' takes the user to the Events screen as shown below

This shows the list of events filtered for type where the event is of type Event i.e. a list of Events

The fields shown in list of all events is same as that in recent event list. Also the same filtering of data, paging, sorting and search is present as on the recent event list

The user can also export the hit alarms to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

6.2.4 View Event Hit List

Clicking on 'View Event Hit List' takes the user to the Events Hit List screen as shown below

This shows the list of events filtered for type where the event is of type Events i.e. a list of events and then shows the number of occurrences over a given period of time.

The fields shown in list of all events hit is same as that in recent event list. Also the same filtering of data, paging, sorting and search is present as on the recent event list

The user can also export the hit events to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

6.2.5 Export Data to CSV

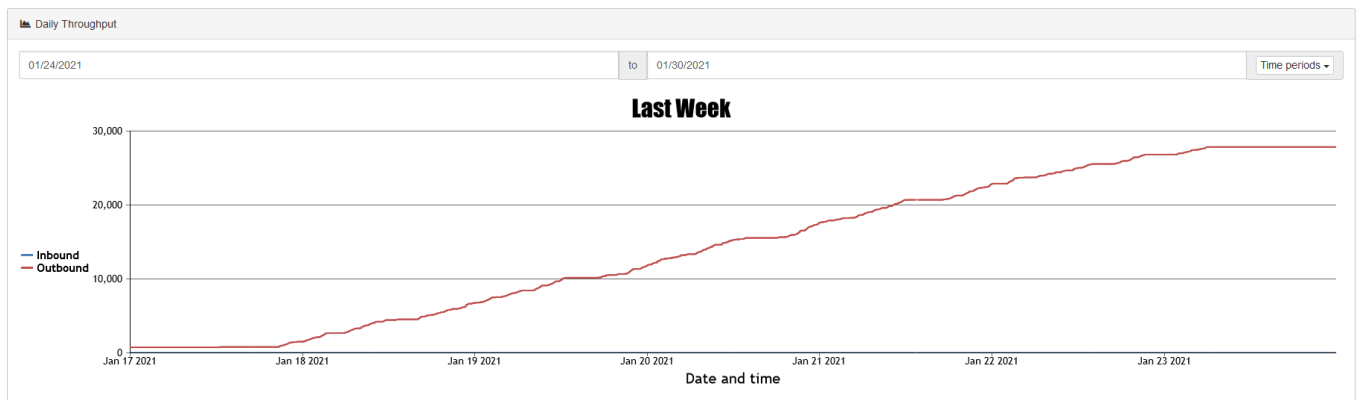
Clicking on this button will export all the recent events data to CSV file

6.2.6 Export Data to Excel

Clicking on this button will export all the recent events data to Excel file

6.3 Daily Throughput

The daily throughput section shows a graph of the daily throughput of the inbound and outbound portions of the MHE equipment.



The list can be filtered using either the start date and 'to' date or by specifying the time period using the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

6.4 Chat

The chat section can be used to chat with other users in the system as shown in the screenshot below



The user can type the message in the box with 'Type your message here' box and press Send and **message will be stored in system and will be visible to all the users logged in to the system on their Dashboard – Chat section.** If user wants to address the message to a specific user, the user can type 'use @name', select whom he wants to send the message to and then send the message

7 Container Data

The list of containers and their data within the system will be shown as below

Container Data

Container Data

01/31/2021

to

01/31/2021

Time periods ▾

Show

10

▾

entries

Search:

Carton ID	Status	Lane Assign	Lane Actual	Carrier	Service	Tracking	Divert Confirm	Divert Ack	Reason Code	Reason	Created At	Updated At	File Name
No matching records found													

Showing 0 to 0 of 0 entries (filtered from 2 total entries)

< Previous

Next >

Export data to CSV

Export data to Excel

The snip above shows the default fields within Container Data. Each deployment of the Container Data page will be customized to meet the needs of the End User.

The following fields are shown in the list

- Carton ID: Unique ID of the Container (usually the main barcode on the container)
- Status: Status of the container (usually where the carton is throughout the system, occasionally just N or S for Not-Shipped or Ship Complete)
- Lane Assign: the last lane that the carton was assigned on a sorter
- Lane Actual: the MHE confirmation of which lane the carton was sorted to
- Carrier: Which carrier the carton is to be shipped with (UPS, FedEx, etc.)
- Service: The carrier service that the carton is to be shipped (Ground, Overnight, 2-day)
- Tracking: The tracking number of the Shipping Label
- Divert Confirm: "No" if the package has not been confirmed as having been diverted on the shipping sorter; "Yes" if it has been confirmed.
- Divert Ack: "No" if the WXS has not received an acknowledgement from the host (ERP/WMS) that the Ship Complete message has been received; "Yes" if the divert confirm message to the host has been acknowledged.
- Reason Code: A number of the event that occurred last. This is usually just for the Host
- Reason: The descriptive text of the Reason Code:
 - 01: Successful Divert
 - 02: No Response from Host
 - 03: Tracking Error
 - 04: Gap Error
 - 05: Destination Full
 - 06: Destination Not Operational
 - 07: Invalid Destination
 - 08: No Read
 - 09: No Code
 - 10: Multi-Label
 - 11: Choke/Throughput Limit
 - 12: Failed to Divert

-
- 13: No Lane Assigned
 - 14: Lost Container
 - 15: Weight Error
 - 16: Duplicate
 - 17: Does Not Exist in Database
 - 18: Dimension Error

- Created At: Timestamp of when this carton was received from the Host
- Updated At: Timestamp of when this carton was last handled in the WXS/MHE system by a scanner/decision point.
- File Name: The name of the file this carton was transferred down to the WXS from the Host via.

The containers to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can also search for events using the 'Search' box located at the top right of the list

The user can also export the container list to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

8 System Details

8.1 Key

[System Details](#) > [Key](#)

The list of the keys configured in the system will be shown

Key	
Black Disarmed/Wait in OT	
Yellow Failed to Start	
Dark grey In Operator Mode	
Red S-Stopper	
Orange Jam Condition Present	
Blue Lane Full Place	
Purple Energy Management Phase	
Light green Ready to Run	
Dark green Running	
Save	

The configuration shows for each key (a particular condition), the color that has been set.

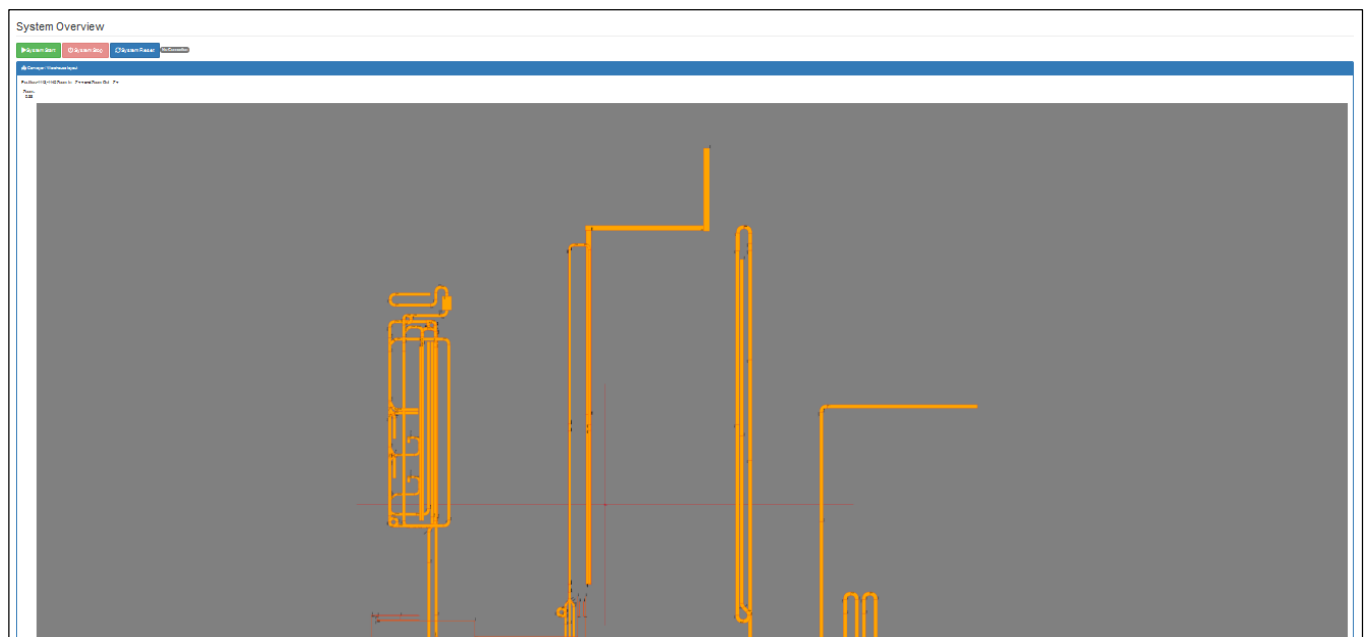
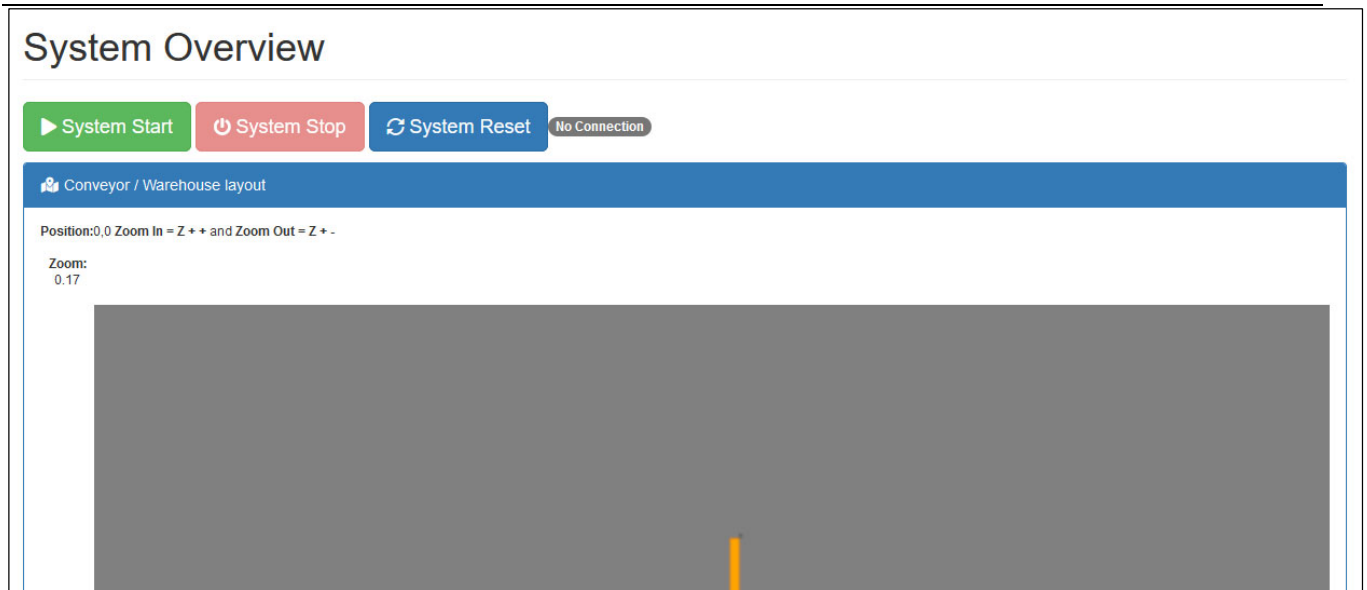
To change the configuration, change the key text against the color and press on Save to save the changes into the system

Note, this is set by Pendant Automation during commissioning

8.2 System Overview

[System Details](#) > [System Overview](#)

An overview of the system in graphical form along with options for system control is shown



There are two sections

8.2.1 System control section

The section has the following options

- System start: This option is used to start the system. It can only be used when system is in 'Stopped state'
- System stop: This option is used to stop the system It can only be used when system is in 'Running state'
- System reset: This option is used to reset the system
- System Status: This text shows the current System Status such as "Ready, Running, Faulted"

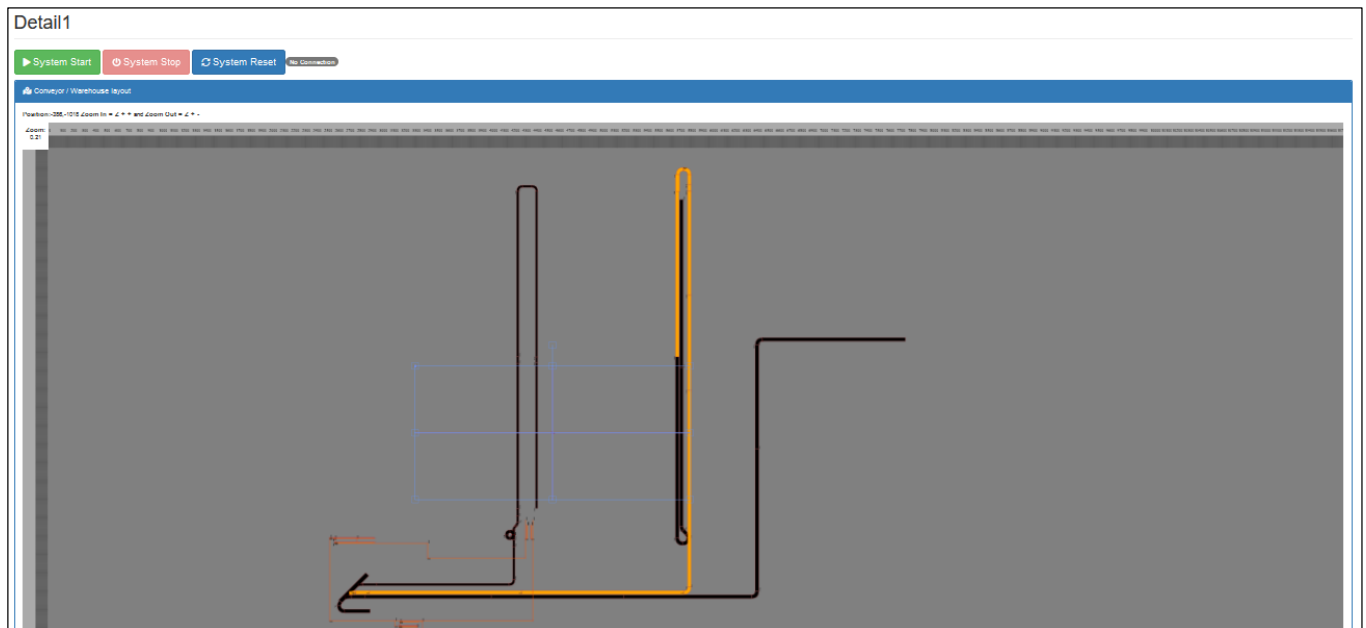
8.3 Conveyor/Warehouse Layout

The Conveyor /Warehouse layout is shown in a graphical form. The position can be changed by drag and drop of the area of interest inside the image. The zoom can be adjusted using keyboard shortcuts Z + + (Zoom In) and Z + - (Zoom out)

8.4 Detail(x) (Name)

System Details > Detail(x) (Name)

A detail of the system in graphical form along with options for system control is shown



There are two sections

8.4.1 System control section

The section has the following options

- System start: This option is used to start the system. It can only be used when system is in 'Stopped state'
- System stop: This option is used to stop the system It can only be used when system is in 'Running state'
- System reset: This option is used to reset the system
- Status: The Status will be shown, such as "Ready, Running, Faulted"

8.4.2 Conveyor/Warehouse Layout

The Conveyor /Warehouse layout Detail 1 is shown in a graphical form. The position can be changed by drag and drop of the area of interest inside the image. The zoom can be adjusted using keyboard shortcuts Z + + (Zoom In) and Z + - (Zoom out)

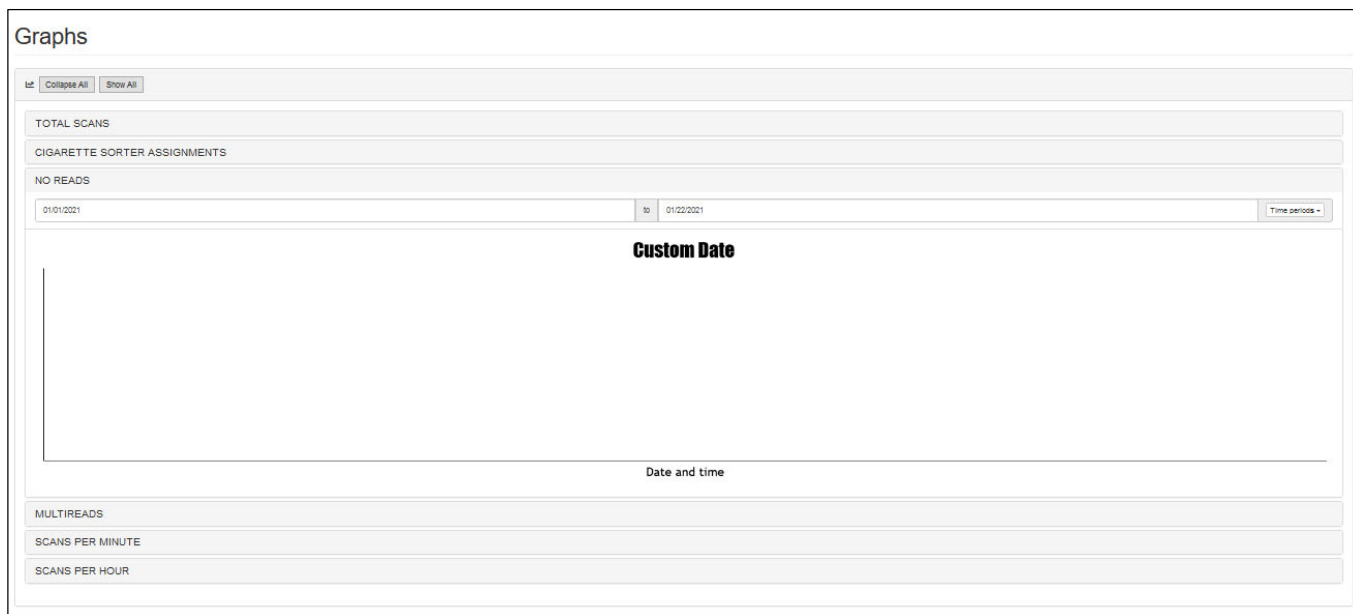
9 Performance Graphs

Performance > Graphs

This shows the graphs showing the performance of the system. The graphs can be all in collapsed state as shown below



Or one or more graphs can be opened as shown below, or all graphs can be opened at once by clicking on 'Show All' button (clicking on 'Collapse All' button will collapse all the graphs)

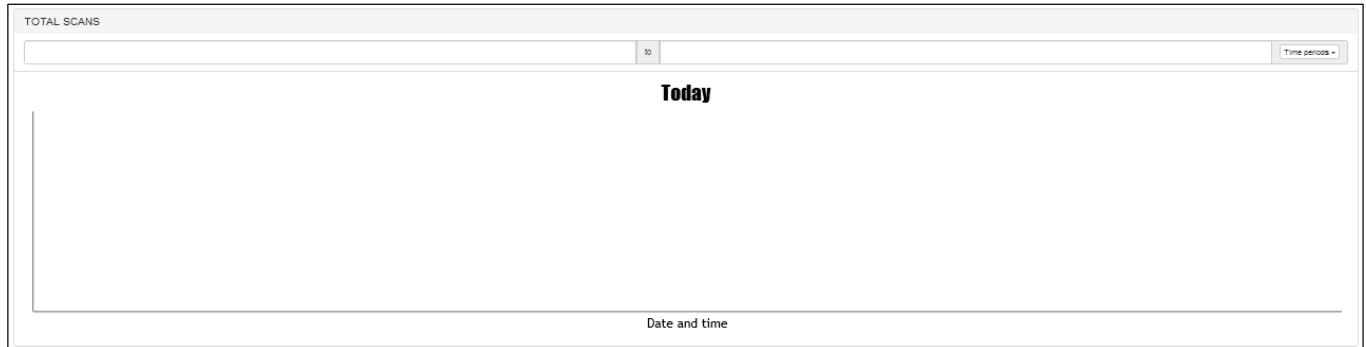


Similarly clicking on a graph header toggles the graph between show and collapsed state

The following graphs are available

9.1 TOTAL SCANS

This graph shows the total scans done. By default the total scans done today are shown



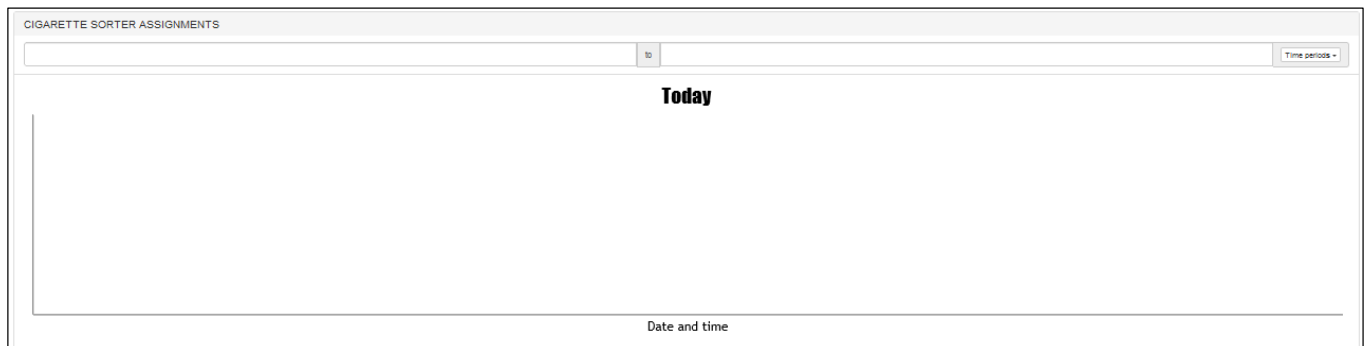
The scans done are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



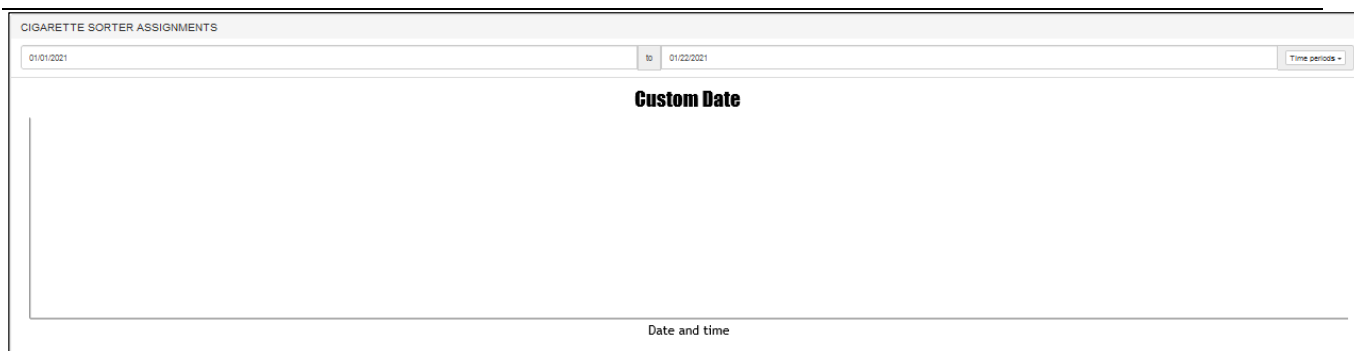
9.2 CIGARETTE SORTER ASSIGNMENTS

This graph shows the cigarette sorter assignments. By default the assignments for today are shown



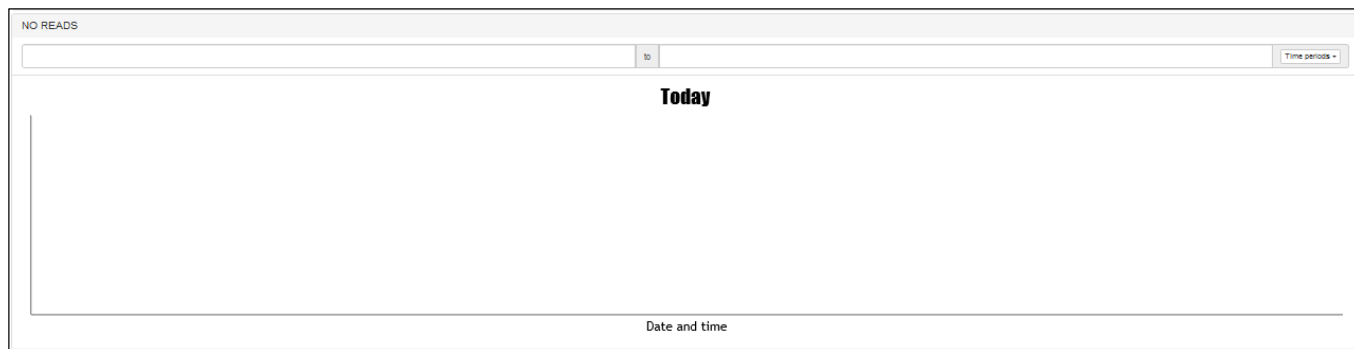
The assignments are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



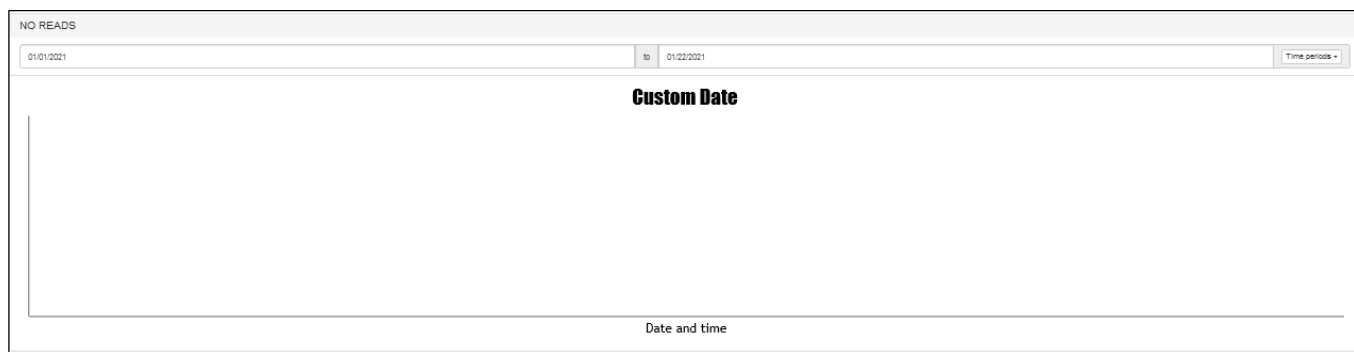
9.3 NO READS

This graph shows the 'No Reads'. By default the 'No Reads' for today are shown



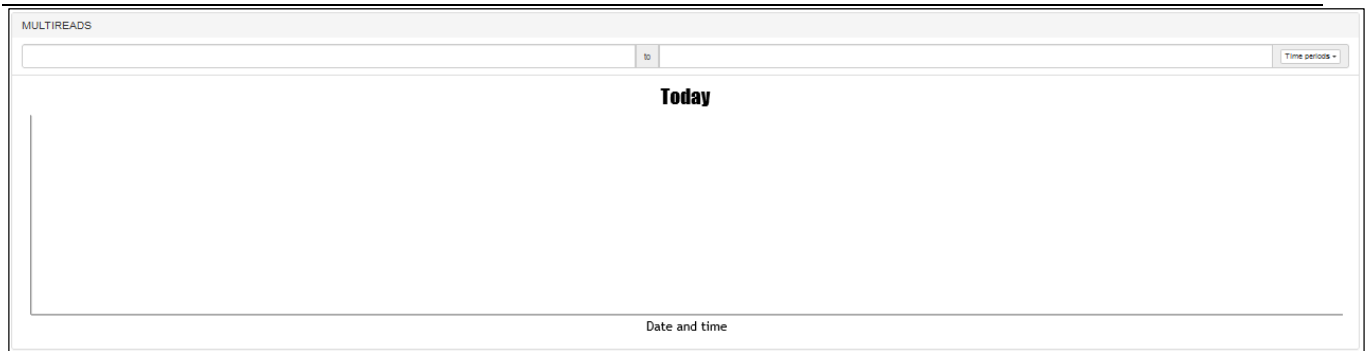
The 'No reads' are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



9.4 MULTIREADS

This graph shows the 'Multireads'. By default the 'Multireads' for today are shown



The 'Multireads' are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



9.5 SCANS PER MINUTE

This graph shows the scans per minute. By default the scans per minute for today are shown



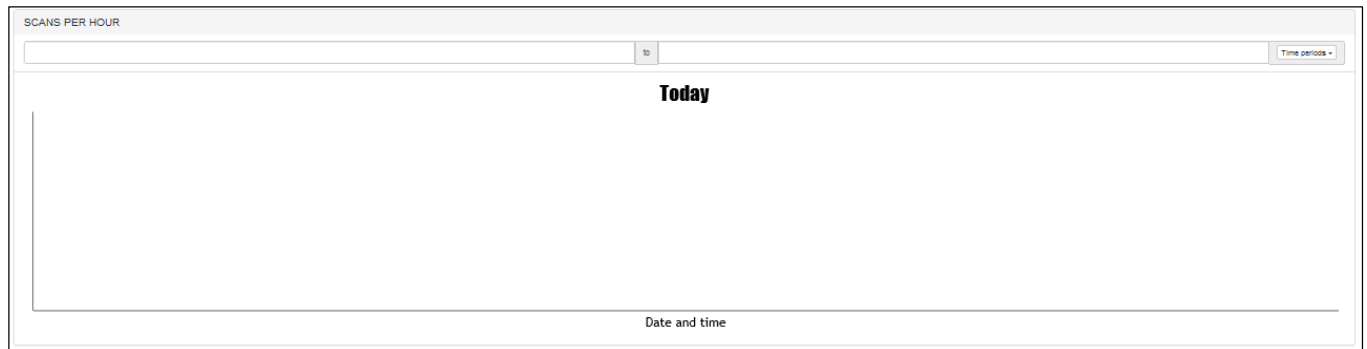
The scans per minute are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



9.6 SCANS PER HOUR

This graph shows the scans per hour. By default the scans per hour for today are shown



The scans per hour are shown on Y axis and the date and time is shown on X axis

The user can change the date span either by specifying the start and 'to' date or by selecting one of the options from the 'Time periods' dropdown (Today, Yesterday, This Week etc.) as shown below



10 Alarms & Events

10.1 Alarms

[Alarms & Events](#) > [Alarms](#)

This shows the list of Alarms in the system as below

Alarms

! Alarms

01/21/2021 to 01/21/2021 Time periods ▼

Show 10 entries Search:

Class	Location	Description	Timestamp
No data available in table			

Showing 0 to 0 of 0 entries < Previous Next >

[Export data to CSV](#) [Export data to Excel](#)

The following fields are shown in the list

- Class: The class of the alarm; such as: Alarm; Warning; Comm Failure; Fault
- Location: Location of the alarm; such as: Shipping; Pick Zone
- Description: Description of the alarm
- Timestamp: Timestamp of the alarm

The alarms to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for alarms using the 'Search' box located at the top right of the list

The user can also export the alarms to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.2 Events

[Alarms & Events](#) > [Events](#)

This shows the list of Events in the system as below

Events

Events

01/21/2021

to

01/21/2021

Time periods ▾

Show

10 ▾

entries

Search:

Class	Location	Description	Timestamp
No data available in table			

Showing 0 to 0 of 0 entries

< Previous

Next >

Export data to CSV

Export data to Excel

The following fields are shown in the list

- Class: The class of the event; such as: Info; Notification; Jam; Lane Full; E-Stop
- Location: Location of the event; such as: Shipping; Pick Zone
- Description: Description of the event
- Timestamp: Timestamp of the event

The events to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for events using the 'Search' box located at the top right of the list

The user can also export the events to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.3 Alarms Hit List

[Alarms & Events](#) > [Alarms Hit List](#)

This shows the Alarms Hit List as below

Alarms Hit List

! Alarms Hit List

01/21/2021

to

01/21/2021

Time periods ▾

Show 10 ▾ entries

Search:

Class	Location	Description	Occurrences	Timestamp
No data available in table				

Showing 0 to 0 of 0 entries

< Previous

Next >

Export data to CSV

Export data to Excel

Note: The Hit List shows the User a total number of occurrences over a given time period.

The following fields are shown in the list

- Class: The class of the alarm hit
- Location: The location of the alarm hit
- Description: The description of the alarm hit
- Occurrences: How many times did this Alarm occur over the given period
- Timestamp: The timestamp of the alarm hit

The alarms that show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for alarms hit using the 'Search' box located at the top right of the list

The user can also export the alarms hit data to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.4 Events Hit List

[Alarms & Events](#) > [Events Hit List](#)

This shows the Events Hit List as below

Events Hit List

01/21/2021

to

01/21/2021

Time periods ▾

Show 10 ▾ entries

Search:

Class ▾	Location ▾	Description ▾	Occurrences ▾	Timestamp ▾
No data available in table				

Showing 0 to 0 of 0 entries

< Previous

Next >

Export data to CSV

Export data to Excel

Note: The Hit List shows the User a total number of occurrences over a given time period.

The following fields are shown in the list

- Class: The class of the event hit
- Location: The location of the event hit
- Description: The description of the event hit
- Occurrences: How many times did this Event occur over the given period
- Timestamp: The timestamp of the event hit

The events hit to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for events hit using the 'Search' box located at the top right of the list

The user can also export the events hit data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

11 Maintenance

11.1 Motor Control

Maintenance > Motor Control

This shows the list of motors for control as below

The screenshot shows the 'Motor Control' interface. At the top, there's a 'Filter:' section with a 'Filter by Name' input field and a 'Filter by Operator Mode' toggle. To the right, there's a 'Global Speed Units:' dropdown menu set to 'FPM'. Below these, three motor control panels are visible: P418 (Standard), P417 (Standard), and P403 (Standard). Each panel has a 'Ready to Run' status and a set of control buttons: Start (green), Stop (red), Jog (orange), and Reset (blue). The P418 panel also has an 'Operator Mode' toggle.

The list can be filtered by name of the motor or by toggling the 'Filter by Operator mode'

The global speed limits can also be set using the 'Global Speed Units' dropdown.

11.1.1 Motor Control

For each motor the following is shown

The screenshot shows the detailed control interface for motor P424 (VFD). The title bar indicates 'P424 (VFD)' and 'Ready To Run'. On the left, there are four control buttons: Start (green), Stop (red), Jog (orange), and Reset (blue). To the right of these buttons is a 'Program Mode' toggle. Below the buttons, there are two input fields for 'Actual Speed', both showing '0'. Below these are two input fields for 'Accel Time (s)' and 'Decel Time (s)'. At the bottom, there are two large blue buttons: '← Reverse' and 'Forward →'. Below these buttons, the text 'Direction: Reverse' is displayed.

The name of the motor is shown on left on the title bar (P424 in this case). The current status of the motor is shown on the right side of the title (Ready to Run in this case)

On the left hand side section the following buttons are shown for control of motor

- Start: Pressing this button will start the motor. While the motor is running this button will be disabled
- Stop: Pressing this button will stop the motor. While the motor is stopped this button will be disabled
- Jog: Pressing this button will set the motor in 'Jog' mode

- **Reset:** Pressing this button will reset the motor, i.e. if the motor is faulted it will reset the fault.

On the right hand side the settings to control the running of the motor are shown. They are

- **Program/Operator Mode:** This can be toggled to place the motor control from the PLC (Program) or in Maintenance Mode (Operator)
- **Speed Input:** The Speed that the motor will run (VFD Only)
- **FPM:** The FPM of the motor at 100% if Global Speed Units is set to FPM
- **Actual Speed:** The actual speed of the motor will be shown
- **Acceleration Time input (left side):** The input box with prompt as 'Accel Time (s)' on the left-hand side is where the acceleration time can be specified in seconds when motor is to be run in reverse direction
- **Acceleration Time input (right side):** The input box with prompt as 'Accel Time (s)' on the right-hand side is where the acceleration time can be specified in seconds when motor is to be run in forward direction
- **Reverse:** When this button is pressed the motor will be run in reverse direction
- **Forward:** When this button is pressed the motor will be run in forward direction
- **Direction:** The current direction of running of motor (forward or reverse) is shown

11.2 Network and I/O

Maintenance > Network & I/O

This consists of two sections: Industrial Network and I/O Status:

11.2.1 Industrial Network

This shows the list of devices in the system as shown below

Industrial Network		
Show <input type="text" value="10"/> entries		
		Search: <input type="text"/>
Device	Status	Address
Cigarette Sorter Scanner One	Active	10.21.56.80
Dock Door Two Scanner Two	Active	10.21.56.83
Dock Door Two Hand Scanner	Active	10.21.56.95
Dock Door Two Scanner Five	Active	10.21.56.86
Dock Door Two Scanner Four	Active	10.21.56.85
Dock Door Two Scanner One	Active	10.21.56.82
Dock Door Two Scanner Six	Active	10.21.56.87
Dock Door Two Scanner Three	Active	10.21.56.84
VFD 109	Active	10.21.56.63
Dock Door One Scanner Three	Active	10.21.56.90
Showing 1 to 10 of 36 entries		
Export data to CSV		Export data to Excel
		Previous 1234 Next

The following fields are shown for each device

- **Device :** The device name
- **Status:** The device status as Active or Inactive
- **Address:** The device address

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for devices using the 'Search' box located at the top right of the list

The user can also export the device list to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

11.2.2 I/O Status

The list of PLC Hardware I/O tags in the system is shown as below

The screenshot shows the 'I/O Status' interface. At the top, there's a 'Browse...' button with 'No file selected.' text. Below it are 'Import CSV Tag Names' (blue) and 'Download Template' (green) buttons. A 'Show 10 entries' dropdown is on the left, and a 'Search:' text box is on the right. A 'Poll I/O Status' button is in the top right corner. The main area contains a table with five columns: 'Tag Name', 'Description', 'Specifier', 'Status', and 'Data Type'. At the bottom, there are two buttons: 'Export data to CSV' and 'Export data to Excel'.

Please note this will only show tags that are physical such as Inputs and Outputs

The following fields are shown for each I/O tag

- Tag Name: The tag name
- Description: The description of the tag
- Specifier: The specifier of the tag such as Local:1:I.Data0
- Status: The status of the tag as True/False
- Data Type : The data type such as BOOL

The user can import list of I/O tags into the system using the 'Import CSV Tag Names'. For this the user needs to first download a template using 'Download Template' which will download a .csv file with the 'Tag', 'Description', 'Specifier', 'Status' and 'Type' column headers and some sample data.

The user needs to be fill up the template with his list of I/O tag data and then click Browse to select the updated file. After this the user can press the 'Import CSV Tag Names' to import the I/O tag data from the browsed file into the system. If there are any errors in the import they will be shown.

We recommend downloading the Template first, adding the I/O data, and then importing.

Once a list of I/O tags is imported into the system the number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for tag names using the 'Search' box located at the top right of the list

The user can also export the existing I/O tags list to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

Clicking on the 'Poll I/O status' can be used to update the status of the I/O tags in the system

Note that there must be a Search/Filter of 16 or fewer tags before polling will happen.

11.3 Data Sheets

Maintenance > Data Sheets

This shows the list of data sheets in the system

Data Sheet

[Add New Data Sheet](#)

Data Sheet

Show
 10
 entries

Search:

ID	Title	Actions
22	CB Siemens UL 489	Edit/Replace Delete Download
21	1579128545	Edit/Replace Delete Download

Showing 1 to 2 of 2 entries

< Previous
 1
 Next >

Export data to CSV

Export data to Excel

The following fields are shown for each data sheet

- Title: The Title of the datasheet. The title is hyperlinked and clicking on the title allows download of the datasheet .pdf file
- Actions: The actions that can be performed on the datasheet. Available actions are 'Edit/Replace', 'Delete' and 'Download'

11.3.1 Add New Data Sheet

To add a new data sheet click on the 'Add New Data Sheet' button. This brings up the add screen

'Browse' the new datasheet to be uploaded (.pdf file). After selecting the new datasheet press on the 'Create New Data Sheet' button to add the new datasheet to the system.

Clicking on 'Back to Datasheet' will take the user back to the datasheet list page

11.3.2 Edit/Replace, Delete, Download actions

11.3.2.1 Edit/Replace

To edit a data sheet click on the Edit/replace button on the corresponding datasheet row. This will take you to the Edit Datasheet as shown below

User can browse and select a new datasheet file (.pdf file) and on press of 'Save Data Sheet' the new datasheet file will replace the earlier datasheet file in the system

11.3.2.2 Delete

To delete a datasheet click on the 'Delete' button on the corresponding datasheet row

11.3.2.3 Download

To download a datasheet click on the 'Download' button on the corresponding datasheet row

Once the list of datasheets is populated in the system, the number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for datasheet title using the 'Search' box located at the top right of the list

The user can also export the datasheet list to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively. Note: Export just includes the ID, Title and PDF file name of each datasheet in the list. It will not download the .pdf files.

12 Reports

12.1 Reports List

[Reports](#) > [Reports List](#)

The list of reports in the system is shown

The following fields are shown for each report

- User: The user who created the report
- Name: The name of the report
- Recurring : Specifies if report is recurring or one time
- Email : Specifies is report is set to be emailed to specific recipients
- Type: The type of recurrence
- Recurring Time: If report is a recurring report , then the time of recurrence
- Actions: The actions on the report

The reports to show in the list can be filtered either by specifying the start and ‘To’ date or by specifying the time period from the ‘Time periods’ dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the ‘Show x entries’ at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the ‘Previous’ and ‘Next’ buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for reports using the ‘Search’ box located at the top right of the list

The user can also export the reports to CSV file or to an Excel file by clicking on the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

12.1.1 Create Report

To create a report click on the 'Create Report' button which brings up the create screen

New Reports

Name

Name*

Description

Description

Location

reports/pdf

Report Contents

None Selected

Email Report?

Off

Receivers

None Selected

Email Receivers

Recurring Report?

Off

Recurring Type

Today

Recurring Time

--:--

Create Report

Fill in the fields to create a new report

- Name: The name of the report. Please note this field is mandatory
- Description: The description of the report
- Location: The location of the report
- Report contents: The contents of the report. Please select an option from the dropdown as shown below

The user can search using the search box for a specific content for report or directly select from the list

- Email Report? : This specifies if report is to be emailed and can be toggled between On/Off
- Receivers: If report is selected to be emailed, you can specify the list of users using the dropdown here to select the users to whom the report is to be emailed

- Email receivers: If report is selected to be emailed, then here you can specify the list of emails of receivers. The list of emails can be specified with email addresses being separated by a comma. **Note:** This is for users who are not in the system, for users in the system they can be set to receive the report by email using the 'Receivers' field as above
- Recurring Report: This specifies if report is to recurring or one time only and can be toggled between On/Off
- Recurring Type: If the report is to be recurring, the recurring type option can be set from the dropdown

- Recurring Time: If the report is recurring specify the recurrence time in 'hh:mm AM/PM' format where 'hh' can have value from 0 to 12 and 'mm' can have value from 0 to 60

08:00 AM
⌵

After filling in all the fields and clicking on 'Create Report' will save the report in the system. The report will now appear in the report list with a success message shown of successful addition of the new report

[Create Report](#)

Reports

Report has been created successfully!

Reports

01/23/2021
to 01/23/2021
Time periods ▾

Show 10 ▾ entries
Search:

User	Name	Recurring?	Email?	Type	Recurring Time	Actions
TransTech	Test	Yes	Yes	today	10:10:00	34

Showing 1 to 1 of 1 entries
< Previous 1 Next >

Export data to CSV
Export data to Excel

12.2 Create Report

[Reports](#) > [Create Report](#)

This will bring up create report as shown below

New Reports

Name

Description

Location

Report Contents

Email Report? ☐ Off

Receivers

Email Receivers

Recurring Report? ☐ Off

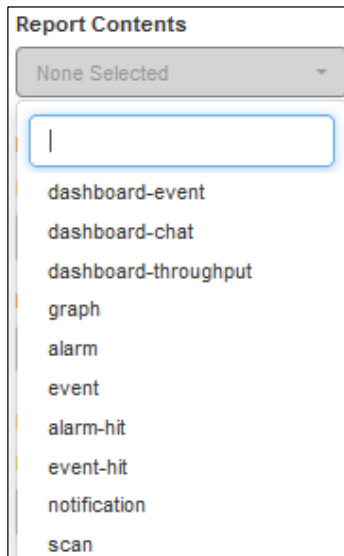
Recurring Type

Recurring Time

[Create Report](#)

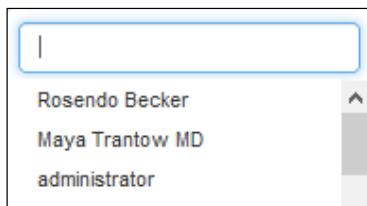
Fill in the fields to create a new report

- Name: The name of the report. Please note this field is mandatory
- Description: The description of the report
- Location: The location of the report (this should remain reports/pdf)
- Report contents: The contents of the report. Please select an option from the dropdown as shown below

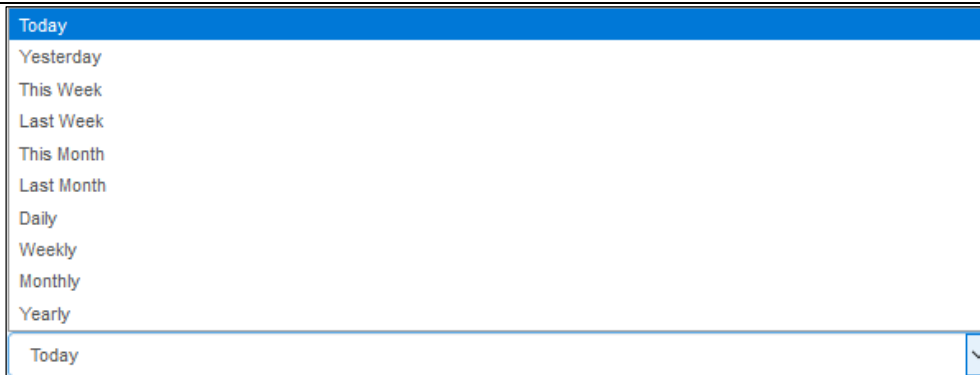


The user can search using the search box for a specific content for report or directly select from the list

- Email Report? : This specifies if report is to be emailed and can be toggled between On/Off
- Receivers: If report is selected to be emailed, you can specify the list of users using the dropdown here to select the users to whom the report is to be emailed



- Email receivers: If report is selected to be emailed, then here you can specify the list of emails of receivers. The list of emails can be specified with email addresses being separated by a comma. **Note:** This is for users who are not in the system, for users in the system they can be set to receive the report by email using the 'Receivers' field as above
- Recurring Report: This specifies if report is to recurring or one time only and can be toggled between On/Off
- Recurring Type: If the report is to be recurring, the recurring type option can be set from the dropdown



A screenshot of a web application interface showing a dropdown menu. The menu is open, displaying a list of options: Today, Yesterday, This Week, Last Week, This Month, Last Month, Daily, Weekly, Monthly, and Yearly. The 'Today' option is highlighted in blue. Below the list, there is a text input field containing 'Today' and a small downward arrow icon on the right side.

- Recurring Time: If the report is recurring specify the recurrence time in 'hh:mm AM/PM' format where 'hh' can have value from 0 to 12 and 'mm' can have value from 0 to 60



A screenshot of a web application interface showing a text input field for recurring time. The field contains the text '08:00 AM'. There is a small 'x' icon on the right side of the field, likely for clearing the input.

After filling in all the fields and clicking on 'Create Report' will save the report in the system. The report will now appear in the report list.

13 Notifications Manager

13.1 Notifications List

[Notifications Manager](#) > [Notifications List](#)

The list of notifications will be shown

The screenshot shows the 'Notifications' section of the WXS user interface. At the top, there's a 'Show 10 entries' dropdown and a 'Search:' input field. Below this is a table with columns: Description, Receivers, Method, Weekdays, Time Start, and Time End. The table body contains the text 'No matching records found'. Below the table, it says 'Showing 0 to 0 of 0 entries (filtered from 10 total entries)'. At the bottom, there are two buttons: 'Export data to CSV' and 'Export data to Excel'. Navigation buttons '< Previous' and 'Next >' are also present.

The fields shown in the list for each notification will be –

- Description : The description of the notification
- Receivers: The list of receivers who will receive the notification
- Method: The method of notification like 'SMS', 'Email' etc.
- Weekdays: The days on which the notification will be sent
- Time Start: The start time after which the notification can be sent
- Time End: The end time till which the notification can be sent

The number of Notifications to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for notifications using the 'Search' box located at the top right of the list

The user can also export the notifications data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

13.2 Create Notification

[Notifications Manager](#) > [Create Notification](#)

This will bring up create notifications as shown below

Create Notifications

Description of alarm/event

Description

Receivers

No one selected

Message Sending Method

SMS

Select days

☐ Monday
 ☐ Tuesday
 ☐ Wednesday
 ☐ Thursday
 ☐ Friday
 ☐ Saturday
 ☐ Sunday

Start time

End time

Confirm and Add

Cancel

Fill in the fields to create a new notification

- Description of alarm/event: The description of alarm/event **This shall be copied from the Alarm/Events table on the Dashboard and pasted in here**
- Receivers: The receivers can be selected from the dropdown

Rosendo Becker

Maya Trantow MD

administrator

User can search for a receiver or can directly select from the list

- Messaging sending method: Choose one of the message sending methods from the drop down. **'SMS' method is the default** some systems only allow email via SMTP. Contact your System Admin for more info.
- Select Days: Select one or more days by checking on the corresponding days

Select days

☒ Monday
 ☒ Tuesday
 ☐ Wednesday
 ☐ Thursday
 ☐ Friday
 ☐ Saturday
 ☐ Sunday

- Start time: **Enter the start time after which the notification can be sent.** Note this has to be in 'hh:mm AM/PM' format where 'hh' (hour) can have values from 0 -12 and 'mm' (minute) can have values from 0 -60

Start time

08:00 AM

-
- End Time: **Enter the end time till which the notification can be sent.** Note this has to be in 'hh:mm AM/PM' format where 'hh' (hour) can have values from 0 -12 and 'mm'(minute) can have values from 0 -60

End time

10:00 AM

After filling in all the fields and clicking on 'Confirm and Add', will save the new notification in the system. The notification will now appear in the list of notifications

14 Admin

14.1 User Admin

14.1.1 User List

[Admin](#) > [User Admin](#) > [User List](#)

The list of the users in the system is shown

User List				
Show	10	entries	Search:	
Name	E-Mail	Role	Locked Out Status	Action
Ada Collins	ford53@example.org	Administrator		Delete
Adaline Krajcik V	brooke96@example.net			Delete
administrator	administrator@gmail.com	Administrator		Delete
Adolf Ruecker	kassulke.kaitlyn@example.org			Delete
Alan Kovacek	martine.homenick@example.com			Delete
Alexzander Marvin	mmacejkovic@example.org			Delete
Allivia Lowe	stanton.kameron@example.com			Delete
Althea Allenwerth I	inienow@example.com			Delete
Anabelle Schimmel MD	omer.durgan@example.com			Delete
Anand	anand_bhagwat@vaspsolutions.com	Administrator		Delete

Showing 1 to 10 of 174 entries

< Previous 1 2 3 4 5 ... 18 Next >

The following fields are shown in the list for the users

- Name: The full name of the user
- Email: The email of the user
- Role: The role of the user
- Locked-out status: Whether the user is locked out
- Action: Action which can be taken on the user

The list is pages to show 10 users by default. This can be changed via the 'Show X entries'.

The number of users being shown and the change to page number can be changed via the corresponding option at the bottom of the grid

Showing 1 to 10 of 172 entries

< Previous 1 2 3 4 5 ... 18 Next >

Search can also be performed using the search box at the top right side of the list as shown below

Users

User List

Show 10 entries

Search:

Name	E-Mail	Role	Locked Out status	Action
Ada Collins	for63@example.org	Administrator		Delete
Adaline Kragick V	brooke86@example.net			Delete
Paul Castro	tada1juna@gmail.com	Maintenance		Delete

Showing 1 to 3 of 3 entries (filtered from 172 total entries)

[< Previous](#)
[1](#)
[Next >](#)

To perform the Action 'Delete' available for each user click on the 'Delete' button in the last row corresponding to the row of the user. After confirmation as shown below, the user will be permanently deleted from the system.

Confirmation

Are you sure you want to cancel Ada Collins account?

[Yes](#)
[No](#)

Clicking on the name of user will bring up the user profile view as shown below

Profile

[Actions](#)
[Edit](#)
[Delete](#)

User name

for63@example.org

Email

for63@example.org

Dark Theme

FALSE

Dashboard Portlets

First Name

Last Name

Phone Number

User Role

Last Login Date

Last Password Change Date

Account status

Email Confirmed

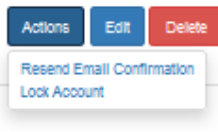
Created: 11/30/2019 09:02:37 pm

Updated: 12/22/2020 10:53:45 am

[Actions](#)
[Edit](#)
[Delete](#)

All the details of the user profile will be shown. Note however that all the fields will be read-only here. The actions that can be done on this page are as follows

Clicking on the 'Actions' button will bring the following two options



- ✓ Resend Email Confirmation: Clicking on this will send an email to user for initial login
- ✓ Lock Account: Clicking on this will lock the user's account
- Clicking on the Delete button will delete the user after confirmation
- Clicking on the 'Edit' will take you to the Edit Profile screen as shown below

Profile

User name

First Name

Last Name

Email

Phone Number

Avatar

No file selected.

Please upload a valid square shape profile image file. Size of image should not be more than 256K.

Password

Password Confirmation

Role

Dashboard / Portfolio

Active Alarms

☐

Inbound Throughput

☐

Outbound Throughput

☐

Lane Full

☐

Jam

☐

No Needs

☐

Double Needs

☐

Total Alarms

☐

The admin can change all of the user profile settings including the password and Role and after 'Save' the changes will be saved and Admin will be taken back to the User Profile view with a confirmation message displayed.

14.1.2 Register New User


Admin > User Admin > Register New user

The Register a new user is shown as below

Register a New User



The Admin needs to fill in all the fields, the fields which are mandatory are marked with * in the prompt text. The fields are

- Username: User name of the user. This should be unique in the system, if not system will not accept. This is usually the First and Last Name of the user
- Email: Email of the user. This should be unique in the system, if not the system will not accept. The username and temporary password will be send to this email. **Note: this does not need to be an actual email. You can enter someone@example.com to create a non-functional user email.**
- Temporary password: The temporary password which the user has to change on first login.
 - Note: Clicking on the eye icon  will show the password that is being entered
- First Name: First Name of the user
- Last Name: Last Name of the user
- Phone number: The phone number of the user in format as shown in prompt text
 - Phone number is mandatory. For a non-working number, simply enter (555) 555-5555
- Role: Select the Role of the user from the drop down

14.1.3 User Logs

Admin > User Admin > User Logs

The list of the user logs in the system is shown and any time a function of the WXS is changed, this logs that change and which user made the change.

User Logs

User Logs

01/15/2021

to

01/15/2021

Time periods ▾

Show

10 ▾

entries

Search:

ID ▾	Name ▾	Description ▾	Subject ▾	Causer ▾	Time	Actions ▾
718	default	created	AppUser	AppUser	2021-01-15 03:51:50	Details
717	default	updated	AppUser	AppUser	2021-01-15 03:44:55	Details
716	default	updated	AppUser	AppUser	2021-01-15 03:44:29	Details
715	default	updated	AppUser	AppUser	2021-01-15 01:13:54	Details
714	default	updated	AppUser	AppUser	2021-01-15 01:09:32	Details
713	default	updated	AppUser	AppUser	2021-01-15 00:50:41	Details

Showing 1 to 6 of 6 entries (filtered from 718 total entries)

< Previous

1

Next >

Export data to CSV

Export data to Excel

The Admin can choose the time period for which logs are to be shown either by specifying the start date and the 'To' date, or by selecting the time period from the Time periods dropdown (Today, Yesterday, This week etc.)

There is paging on the list, with number of entries to be shown controlled by the 'Show X entries' dropdown at top left of the list and the navigation between pages can be performed using the 'Previous' and 'Next' buttons at bottom right of the list.

Sorting can be done by clicking on the column header. Clicking on column header again toggles the sorting between ascending and descending and vice versa.

At the bottom of list there are also options for exporting the data to CSV or to Excel format.

Clicking on the 'Details' button on a row on the list brings up the details for the log entry as shown below

User Log Details

Timestamp

2021-01-18 01:32:10

Log Name

default

Description

updated

Subject Type

AppUser

Subject

{
 "id": "2b96759f-63bb-463e-a7dd-7a684eb10063",
 "name": "TransTech",
 "email": "transtech@example.com",
 "first_name": "Trans",
 "last_name": "Tech",
 "phone": "+15555555555",
 "email_verified_at": "2021-01-14 09:10:29",
 "avatar": "default.jpg",
 "profile_dark_mode": 0,
 "dashboard_portlets": null,
 "created_at": "2021-01-14 08:52:41",
 "updated_at": "2021-01-18 01:32:10",
 "last_login_at": "2021-01-18 01:32:10",
 "last_password_changed_at": null,
 "unhashed_password": "Welcome1",
 "lockout": 0,
 "expire": null
 }

Causer Type

AppUser

Causer

{
 "id": "2b96759f-63bb-463e-a7dd-7a684eb10063",
 "name": "TransTech",
 "email": "transtech@example.com",
 "first_name": "Trans",
 "last_name": "Tech",
 "phone": "+15555555555",
 "email_verified_at": "2021-01-14 09:10:29",
 "avatar": "default.jpg",
 "profile_dark_mode": 0,
 "dashboard_portlets": null,
 "created_at": "2021-01-14 08:52:41",
 "updated_at": "2021-01-18 01:32:10",
 "last_login_at": "2021-01-18 01:32:10",
 "last_password_changed_at": null,
 "unhashed_password": "Welcome1",
 "lockout": 0,
 "expire": null
 }

Old Properties

{
 "id": "2b96759f-63bb-463e-a7dd-7a684eb10063",
 "name": "TransTech",
 "email": "transtech@example.com",
 "first_name": "Trans",
 "last_name": "Tech",
 "phone": "+15555555555",
 "email_verified_at": "2021-01-14 09:10:29",
 "password": "\$2y\$10\$mwNmLKRRrTDPs.f66BKVifu.WQbxqJwYtURkqBVZx15Gcc5x/KsTOu",
 "remember_token": "Njfk6oxC5BSAXKxsAchICE9VpinpARPP2C2m5nWxJSJMIZ115bvUNCusit",
 "created_at": "2021-01-14 08:52:41",
 "updated_at": "2021-01-18 00:29:44",
 "last_login_at": "2021-01-18 00:29:44",
 "last_password_changed_at": null,
 "unhashed_password": "Welcome1",
 "lockout": 0,
 "expire": null
 }

Properties

{
 "id": "2b96759f-63bb-463e-a7dd-7a684eb10063",
 "name": "TransTech",
 "email": "transtech@example.com",
 "first_name": "Trans",
 "last_name": "Tech",
 "phone": "+15555555555",
 "email_verified_at": "2021-01-14 09:10:29",
 "password": "\$2y\$10\$mwNmLKRRrTDPs.f66BKVifu.WQbxqJwYtURkqBVZx15Gcc5x/KsTOu",
 "remember_token": "Njfk6oxC5BSAXKxsAchICE9VpinpARPP2C2m5nWxJSJMIZ115bvUNCusit",
 "created_at": "2021-01-14 08:52:41",
 "updated_at": "2021-01-18 01:32:10",
 "last_login_at": "2021-01-18 01:32:10",
 "last_password_changed_at": null,
 "unhashed_password": "Welcome1",
 "lockout": 0,
 "expire": null
 }

Changes

{
 "updated_at": "2021-01-18 01:32:10",
 "last_login_at": "2021-01-18 01:32:10"
 }

The user log details shown are (Note: Data is shown in Json format)

- Timestamp: The timestamp when the record was saved
- Log Name: The name of the log. For each action name we can give it a name, by default it is 'default'
- Description : Created or Updated a record, example: A user was created
- Subject Type: This is the content type that was updated, for example if one item is inserted in database for host log then it will be App/HostLog. (**Note** : This is the internal name))
- Subject: The entry of Hostlog (database table row)
- Causer Type: This indicates how this entry was created. If it is by a logged in user then Causer Type would be: App/User
- Causer: This is the user information
- Old Properties: This is the old record that was recently updated
- Properties: This is the changes that were made
- Changes: The changes in properties

14.1.4 Role Management

Admin > User Admin > Role Management

This brings up the Role Management configuration screen as below

Role Management Config				
Show 10 entries		Search:		
Roles	User	Access	Read & Write	Actions
Operator		Sortation, Sort Routes, Sort Statistics, Sortation Simulator		Edit Delete
Administrator		Dashboard, System Details, Containers, Key, System Overview, Detail 1, Detail 2, Detail 3, Detail 4, Detail 5, Performance, Graphs, Alarms & Events, Alarms, Events, Alarms Hit List, Events Hit List, Maintenance, Motor Control, Network & I/O, Data Sheets, Reports, Create Reports, Notifications Manager, Notifications List, Create Notification, Admin, User Admin, User List, Register New User, User Logs, System Admin, Sortation Config, System Config, Scanner Config, Portlets, Shift Builder, Motor Config, Graph Config, Sortation Simulator Config, Host Interface, Host Log, PLC Log, Truncation Logs, Scanners, Statistics, Scan Log, Merge, Sortation, Sort Routes, Sort Statistics, Sortation Simulator, Zone Routing, Pick to Light, Put Wall, Print & Apply, Weight & Dimension, Set Points, Exception Logs, Chart, Site Vision, CMMS Light, Help & Info	Dashboard, System Details, Containers, Key, System Overview, Detail 1, Detail 2, Detail 3, Detail 4, Detail 5, Performance, Graphs, Alarms & Events, Alarms, Events, Alarms Hit List, Events Hit List, Maintenance, Motor Control, Network & I/O, Data Sheets, Reports, Create Reports, Notifications Manager, Notifications List, Create Notification, Admin, User Admin, User List, Register New User, User Logs, System Admin, Sortation Config, System Config, Scanner Config, Portlets, Shift Builder, Motor Config, Graph Config, Sortation Simulator Config, Host Interface, Host Log, PLC Log, Truncation Logs, Scanners, Statistics, Scan Log, Merge, Sortation, Sort Routes, Sort Statistics, Sortation Simulator, Zone Routing, Pick to Light, Put Wall, Print & Apply, Weight & Dimension, Set Points, Exception Logs, Chart, Site Vision, CMMS Light, Help & Info	Edit Delete
	Paul Crmst	System Details, Containers, Key, System Overview, Detail 1, Detail 2, Detail 3, Detail 4, Detail 5	Dashboard, Detail 1, Detail 2, Detail 3, Detail 4, Detail 5	Edit Delete

The list of role already configured is shown. The list has paging, sorting and export to CSV and Excel facilities as on other pages.

Clicking on 'Delete' will remove a Role configuration after confirmation as shown below

Are you sure, you want to remove this navigation permission?

OK

Cancel

Clicking on 'Edit' for a Role Configuration will bring up the screen for editing as below

Edit Role Management

Roles

Operator

User

None Selected

By default, selected **Navigation Access** will save with **Read** access

Navigation	Access	Read/Write
Dashboard	<input type="checkbox"/>	<input type="checkbox"/>
System Details	<input type="checkbox"/>	<input type="checkbox"/>
Containers	<input type="checkbox"/>	<input type="checkbox"/>
Key	<input type="checkbox"/>	<input type="checkbox"/>
System Overview	<input type="checkbox"/>	<input type="checkbox"/>

Here the Admin can choose the Role and User for which various Navigation options (permissions) are to be given and in what mode – “Access” controls whether or not the role will be able to see the page in the Navigation Bar and “Read/Write” controls whether the user has access to make changes on any given page, not selecting Read/Write will give the user Read-Only access.

After making necessary changes Admin can press Save Role to save the changes.

Add New Role Management Config: Clicking on this button will take the Admin to screen to add a new Role management Config. This will bring up the Add screen as shown below

New Role Management

Role
None Selected

User
None Selected

By default, selected **Navigation Access** will save with **Read** access

Navigation	Access	Read/Write
Dashboard	<input type="checkbox"/>	<input type="checkbox"/>
System Details	<input type="checkbox"/>	<input type="checkbox"/>
Containers	<input type="checkbox"/>	<input type="checkbox"/>

Here the Admin can choose the Role and User for which various Navigation options (permissions) are to be given and in what mode – “Access” controls whether or not the role will be able to see the page in the Navigation Bar and “Read/Write” controls whether the user has access to make changes on any given page, not selecting Read/Write will give the user Read-Only access.

14.1.5 Role List

[Admin](#) > [User Admin](#) > [Role List](#)

The Role list displays the roles currently setup in the system (assignment of permissions is done by role management)

Roles

[Add New Role](#)

Name	User Assigned	Action
Administrator	35	Edit
Operator	7	Edit
Maintenance	3	Edit
Engineer	3	Edit
SuperUser	1	Edit
Super User	2	Edit
main	0	Edit Delete
Rain	0	Edit Delete

Clicking on 'Add New Role' brings up the following screen



Role

Administrator

Close Save changes

The Admin can specify the name of the new Role and pressing 'Save Changes' creates the new role.

On the Role list 'Edit' allows the Admin to edit name of Role while 'Delete' allows Admin to delete role after confirmation.

Note: Roles must have no Users Assigned before they can be deleted

14.2 System Admin

14.2.1 Sortation Config

[Admin](#) > [System Admin](#) > [Sortation Config](#)

This shows the Sortation Configuration

The various options for Enable Test Drive and Inbound and Outbound lanes can be toggled between 'On' and 'Off' state and on press of Submit these changes will be saved

14.2.2 System Config

[Admin](#) > [System Admin](#) > [System Config](#)

This has various sections via which system configurations can be set

14.2.2.1 IP Addresses

This shows the IP addresses configured in the system

This section is to be changed and edited by Pendant Automation ONLY.

IP Addresses	
PLC Name	Current IP
Main	10.200.2.10
Shipping	10.200.2.12
Receiving	10.200.2.12
Sorter	10.200.2.111
Merging	10.200.2.14

Change an IP

Select PLC: Select a PLC

New IP:

14.2.2.2 Notifications Manager Account Set-Up

This allows setup of the notifications settings

Notifications Manager Account Set-Up

You can find your Twilio credentials [here](#)

Notification Type: Email only using SMTP

Twilio SID: ACaf104fb517984d9a35231723ac6cebde

Twilio Token: e7e7c3b5887a090b71087b58984fe117

Twilio From Phone Number: +1256500832222

SMTP Host:

SMTP Port:

SMTP Username:

SMTP Password:

The Notifications Manager can be run off of either SMTP only (only email) or by Twilio which will execute both email and SMS Text Messages.

The Twilio SID, Token and From Phone Number for the account which is used to send out text messages can be set here and on Submit these will be saved

Click "You can find your Twilio credentials here" to visit the Twilio page.

14.2.2.3 System variables

This is used to set the Week type

System Variables

Week Type

Chose a week:

☐ Sunday - Saturday

☐ Monday - Sunday

Submit

The user can change the week type from Sunday –Saturday or Monday –Sunday and on press of Submit it will be saved. Default value should be Monday through Sunday

14.2.2.4 Data Removal

This allows the Admin to set the time frame for which various data will be retained

Data Removal

Table	Time Frame
Events	36 Months
Performance Graph	Indefinitely
Throughput Graph	Indefinitely
Chat Log	Indefinitely
Scanners Scan	1 Month

Change The Time

Table Name:

Events

Time Frame:

1 Month

Submit

From the ‘Change The Time box’ the Admin can choose the Table Name and Time Frame and on Submit the setting will be saved

14.2.2.5 Layout Config (System Overview)

This allows the Admin to set the Layout config (System Overview)

Note: The System Overview and Detail screen data upload is the data for the actual graphics on the System Details Screens.

Layout Config (System Overview)

Import Layout

Browse... No file selected. Submit

Name	Type	Conveyor Type	1XY	2XY	3XY	4XY	IR Mid	OR Mid	Angle	Z-index
Pendant_HMI_Straight_v3	STRAIGHT	BELT	-260.93 -878.32	-280.18 -878.32	-260.93 -1193.62	-280.18 -1193.62			270	
Dynamic_Straight_v0	STRAIGHT	ROLLER	-1823.19 -1500.83	-1826.89 -1470.90	-1872.50 -1506.93	-1876.20 -1477.00			187	
Pendant_HMI_Straight_v3	STRAIGHT	ROLLER	-260.91 -1193.62	-280.16 -1193.62	-260.91 -1437.68	-280.16 -1437.68			270	
Pendant_HMI_Straight_v3	STRAIGHT	ROLLER	-314.75 -1491.31	-314.75 -1472.06	-1697.78 -1491.31	-1697.78 -1472.06			180	
Pendant_HMI_Curve_19x90	CURVE	ROLLER	-261.13 -1437.68	-280.38 -1437.68	-314.75 -1491.31	-314.75 -1472.06	-280.38 -1472.06	-261.14 -1491.31	270	

The Admin needs to upload the settings using an Excel file by selecting it using the Browse button. On Submit the data in the Excel will be used to set the values. In case there is an error in format or values specified in the Excel the system will show an error

See Pendant Automation for the initial upload

The Admin can also download the current settings using the Download button

14.2.2.6 Layout Config (Detail1-5)

This allows the Admin to set the Layout config (System Overview)

Layout Config (Detail1)

Import Layout

Browse... No file selected. Submit

Name	Type	Conveyor Type	1XY	2XY	3XY	4XY	IR Mid	OR Mid	Angle	Z-index
Pendant_HMI_Straight_v3	STRAIGHT	ROLLER	-340.16 -1032.64	-359.41 -1032.64	-340.16 -1332.49	-359.41 -1332.49			270	
Pendant_HMI_Straight_v3	STRAIGHT	ROLLER	-340.16 -972.70	-359.41 -972.70	-340.16 -1032.64	-359.41 -1032.64			270	
Pendant_HMI_Curve_19x45	CURVE	ROLLER	-361.20 -882.56	-341.95 -882.56	-345.10 -844.55	-331.56 -858.23	-341.95 -868.62	-361.20 -860.65	135	
Pendant_HMI_Curve_31x90	CURVE	BELT	-1886.70 -1632.35	-1886.70 -1601.10	-1952.32 -1566.73	-1921.07 -1566.73	-1921.07 -1601.10	-1952.32 -1632.35	180	
Pendant_HMI_Straight_v3	STRAIGHT	ROLLER	-393.78 -1386.11	-393.78 -1366.86	-1597.12 -1386.11	-1597.12 -1366.86			180	

The Admin needs to upload the settings using an Excel file by selecting it using the Browse button. On Submit the data in the Excel will be used to set the values. In case there is an error in format or values specified in the Excel the system will show an error

See Pendant Automation for the initial upload

The Admin can also download the current settings using the Download button

14.2.3 Scanner Config

Admin > System Admin > Scanner Config

This shows the Scanner AutoLink Configuration

Scanner Config

Autolinks

Name	Code Sample	Action
UPS	123264734993922729	Edit Delete
DHL	9999999999	Edit Delete
Fedex	96434554559	Edit Delete
USPS	9443203949	Edit Delete
USPSTC Edited	US43434395	Edit Delete
PHP	1D13243443535	Edit Delete
PHP Edited	1D13243443535	Edit Delete

Add New Autolink

Add/Edit Autolinks

Name

Code Sample

Description

URL

Rules

☐ Code starts with ☐ Find within ☐ Code ends with ☐ Code contains number of characters
 ☐ Code equals ☐ Code does not equal ☐ The character of code is ☐ The character from end of code is ☐ Characters through are equal to ☐ Code is alphanumeric

Submit

The table on left hand side consisting of Name, Code Samples and Action columns shows the list of current scanner autolinks configured in the system. To view/edit details of a scanner autolink press on the Edit button for the scanner. Doing so will populate the details of the scanner on the right hand side. So above if Admin presses on Edit for 'UPS' the view will be as follows

Scanner Config

Autolinks

Name	Code Sample	Action
UPS	123264734993922729	Edit Delete
DHL	9999999999	Edit Delete
Fedex	96434554559	Edit Delete
USPS	9443203949	Edit Delete
USPSTC Edited	US43434395	Edit Delete
PHP	1D13243443535	Edit Delete
PHP Edited	1D13243443535	Edit Delete

Add New Autolink

Add/Edit Autolinks

Name

UPS

Code Sample

123264734993922729

Description

UPS Tracking URL

URL

https://www.ups.com/track?loc=en_US&tracknum=barcode&requester=WIT

Rules

☒ Code starts with

12

☐ Find within ☐ Code ends with ☐ Code contains number of characters
 ☐ Code equals ☐ Code does not equal ☐ The character of code is ☐ The character from end of code is ☐ Characters through are equal to ☐ Code is alphanumeric

Submit

In the Add/Edit Autolinks the following fields can be specified

- Name : Name of scanner autolink
- Code Sample: Enter a sample of the barcode intended to be linked

- Description: Description of the scanner autolink
- URL: The URL of the scanner autolink where xyz can be viewed
 - E.g., [https://www.ups.com/track?loc=en_US&tracknum=\[barcode\]&requester=WT](https://www.ups.com/track?loc=en_US&tracknum=[barcode]&requester=WT)
 - The above is for UPS Tracking. Note that “[barcode]” is used as a code parameter to pass the barcode into the URL.
- Rules: On or more rules can be specified by checking the corresponding check box and specifying the rule

On pressing of Submit the changes for the scanner will be saved.

To add a new AutoLink press on the ‘Add New AutoLink’ button. This brings up the Add screen on the right hand side will all fields blank as shown below

The screenshot shows the 'Scanner Config' interface. On the left, there is a table titled 'Autolinks' with columns: Name, Code Sample, and Action. The table contains entries for UPS, DHL, FedEx, USPS, USPS TO Edited, PHP, and PHP Edited. Each entry has 'Edit' and 'Delete' buttons. Below the table is a button labeled 'Add New Autolink'. On the right, there is a form titled 'Add/Edit Autolinks' with fields for Name, Code Sample, Description, and URL. Below these fields are several rule checkboxes: Code starts with, Find within, Code ends with, Code contains number of characters, Code equals, Code does not equal, The character of code is, The character from end of code is, Characters through are equal to, and Code is alphanumeric. A 'Submit' button is at the bottom right of the form.

Fill in the information for the fields as described earlier in the Edit section. Please note the ‘Name’, ‘URL’, ‘Code Sample’ and ‘Rules’ fields are mandatory. Clicking on Submit will add the scanner autolink and it will then appear on the list of scanner autolinks on the left hand table.

14.2.4 Portlets

[Admin](#) > [System Admin](#) > [Portlets](#)

The list of the portlets in the system is shown

Portlet

Add New Portlet

01/19/2021

to

01/19/2021

Time periods ▾

Show

10 ▾

entries

Search:

ID ▾	Name	Color	Tag Read	Tag Write	Icon	Actions
No data available in table						

Showing 0 to 0 of 0 entries

< Previous

Next >

Export data to CSV

Export data to Excel

The list of portlets can be filtered either by specifying the start date and ‘To’ date or by specifying the Time periods via the ‘Time periods’ (Today, Yesterday, This Week etc.) dropdown

The number of portlets to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The Admin can move to next and previous entry in the list by pressing on the ‘Next’ and ‘Previous’ buttons respectively located at bottom right of the list

The list of portlets currently in the system can be exported in CSV format or to Excel by pressing the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

To create a new portlet press on the ‘Add New Portlet’ button. This brings up the add screen

New Portlet

New Portlet

Name

Color

None Selected ▾

Tag Read

Tag Write

Icon

Create New Portlet

Add values in the fields

- Name: Name of the portlet. This field is mandatory
- Color: Choose a color from the color dropdown
- Tag Read: Add a tag read – this will be the tag in the PLC that the WXS reads.
- Tag Write: Add a tag write – this will be the reset tag in the PLC that the WXS writes to.
- Icon: Clicking on Icon input box will bring up a popup showing the list of available icons as shown below.



Choose the required icon

Pressing on 'Create new Portlet' will add the new portlet to the system

Once a portlet is added it will appear in the list with success message (in green) as shown below

Portlet

Add New Portlet

Portlets has been created successfully!

Portlet

01/19/2021 to 01/19/2021

Time period

Show 10 entries

Search:

ID	Name	Color	Tag Read	Tag Write	Icon	Actions
1	Test	primary	test	test	> fa-angle-right	Edit Delete

Showing 1 to 1 of 1 entries

< Previous

1

Next >

Export data to CSV

Export data to Excel

The 'Actions' column will now show 'Edit' and 'Delete' buttons. Clicking on 'Edit' button will take to Edit screen for the portlet, while clicking on 'Delete' will delete the portlet

Note: after the creation of a new Portlet, the user can go to User Profile to check or uncheck the use of this new portlet

14.2.5 Shift Builder

Admin > System Admin > Shift Builder

The list of the shifts in the system is shown

The list of shifts can be filtered either by specifying the start date and 'To' date or by specifying the Time periods via the 'Time periods' (Today, Yesterday, This Week etc.) dropdown

The number of shifts to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The Admin can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

The list of shifts currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

To create a new shift press on the 'Add New Shift button. This brings up the add screen

Add values in the fields

- Name: Name of the shift. This field is mandatory
- Start Time: Enter start time. **Note:** All times to be entered in 'hh:mm AM/PM' format, where hh is hours from 0 to 12, mm is minutes from 0 to 60.
- Break I Time out: Enter the Break I Time out
- Break I Time In : Enter the Break I Time In
- Break II Time out: Enter the Break II Time out
- Break II Time In : Enter the Break II Time In
- Break III Time out: Enter the Break III Time out
- Break III Time In : Enter the Break III Time In
- End Time: The end time of shift
- Active Week Days: The days of week of shift. By default all are checked. Check/Uncheck as required

Pressing on 'Create New Shift' will add the new shift to the system

Once a shift is added it will appear in the list with success message (in green) as shown below

The screenshot shows the 'Shift Builder' interface. At the top right is a button 'Add New Shift'. Below it is a green success message: 'Shift builder item has been created successfully!'. The main section is titled 'Shift Builder' and contains a date range selector (01/19/2021 to 01/19/2021), a 'Time periods' dropdown, and a 'Show' dropdown set to '10 entries'. Below this is a table with the following columns: Name, Start Time, I Time Out, I Time In, II Time Out, II Time In, III Time Out, III Time In, End Time, Active Week Days, Status, and Actions. The table contains one entry named 'Test' with the following values: Start Time: 09:30:00, I Time Out: 12:00:00, I Time In: 12:30:00 (highlighted green), II Time Out: 16:00:00 (highlighted green), II Time In: 16:30:00, III Time Out: 18:30:00, III Time In: 18:45:00, End Time: 20:00:00, Active Week Days: Mon,Tue,Wed,Thu,Fri,Sat,Sun, Status: Active (highlighted green), and Actions: Edit Delete. Below the table is a 'Showing 1 to 1 of 1 entries' message and a pagination control with 'Previous', '1', and 'Next' buttons. At the bottom are two buttons: 'Export data to CSV' and 'Export data to Excel'.

The Break 1 Time In and Break II Time Out will be highlighted as shown. Also the shift status will be shown as 'Active' as there are days selected in the Active Week Days

The 'Actions' column will now show 'Edit' and 'Delete' buttons. Clicking on 'Edit' button will take to Edit screen for the portlet, while clicking on 'Delete' will delete the shift

14.2.6 Motor Config

[Admin](#) > [System Admin](#) > [Motor Config](#)

The list of the motors in the system should be shown. If none is shown press 'Rescan Motors' and the motors if available will be listed.

If a motor is added or deleted, or renamed within the system, visit this page to update the system with that motor in the WXS.

Moters
Rescan Moters

Moters

Motor rescan requested. Scanning in progress.

14.2.7 Graph Config

[Admin](#) > [System Admin](#) > [Graph Config](#)

The list of the graph settings in the system is shown

Graph Setting
Add New Graph Setting

Id: Graph Setting

Show 10 entries

ID

Roles

Graph

Page

Display

Actions

No data available in table

Showing 0 to 0 of 0 entries

Export data to CSV

Export data to Excel

The list of graph settings can be filtered either by specifying the start date and 'To' date or by specifying the Time periods via the 'Time periods' (Today, Yesterday, This Week etc.) dropdown

The number of graph settings to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The Admin can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

The list of graph settings currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

To create a new shift press on the 'Add New Graph Setting' button. This brings up the add screen

Role

None Selected

Graph Name

None Selected

Page

None Selected

Display? ☐ Off

Create New Graph Setting

Add values in the fields

- Role : Select the role from the Role dropdown
- Graph Name: Enter the graph name. Note specifying value for this field is mandatory
- Page: Select page from Page dropdown. Note specifying value for this field is mandatory
- Display: Display can be toggled On/Off as desired

Pressing on 'Create New Graph Setting' will add the new graph setting to the system

Once the new graph setting is added it will appear in the list with success message (in green) as shown below

Graph Setting

Add New Graph Setting

Graph settings has been created successfully!

Graph Setting

Show 10 entries

Search:

ID	Roles	Graph	Page	Display	Actions
1	Administrator	graphs-outbound-rate	dashboard	Yes	Edit Delete

Showing 1 to 1 of 1 entries

< Previous

1

Next >

Export data to CSV

Export data to Excel

The 'Actions' column will now show 'Edit' and 'Delete' buttons. Clicking on 'Edit' button will take to Edit screen for the graph setting, while clicking on 'Delete' will delete the graph setting

14.2.8 Sortation Simulator Config

[Admin](#) > [System Admin](#) > [Sortation Simulator Config](#)

The list of the sortation simulators in the system is shown

Sortation Simulator

Add Simulation

Sortation Simulator

Simulation Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	Actions

To create a sortation simulator press on the 'Add Simulation' button. This brings up the add screen

Create Simulator

Simulator Name

Field Name 1

Field Name 2

Field Name 3

Field Name 4

Save Simulator

Add values in the fields

- Name: Name of the simulator. This field is mandatory
- Field Name 1: Enter value for field name 1 (e.g., Lane Assigned)
- Field Name 2: Enter value for field name 2 (e.g., Assigned Weight)
- Field Name 3: Enter value for field name 3 (e.g., Carrier)
- Field Name 4: Enter value for field name 4 (e.g., Carrier Service Type)

Pressing on 'Save Simulator' will add the new simulator setting to the system

Once the new simulator setting is added it will appear in the list with success message (in green) as shown below

Sortation Simulator

Add Simulation

Simulator has been created successfully!

Sortation Simulator

Simulation Name	Field Name 1	Field Name 2	Field Name 3	Field Name 4	Actions
test	f1	f2	f3	f4	Edit Delete

The 'Actions' column will now show 'Edit' and 'Delete' buttons. Clicking on 'Edit' button will take to Edit screen for the sortation simulator setting, while clicking on 'Delete' will delete the sortation simulator setting after confirmation from the Admin

15 Host Interface

15.1 Host Log

[Host Interface](#) > [Host Log](#)

The host log will be shown

Host Log

Host Log

01/25/2021 to 01/25/2021 Time periods ▾

Show 10 ▾ entries Search:

Source	Type	Message	Timestamp
No matching records found			

Showing 0 to 0 of 0 entries (filtered from 3 total entries) < Previous Next >

[Export data to CSV](#) [Export data to Excel](#)

The fields shown in the list for each host log entry will be –

- Source: The “To/From” of the Communication (e.g., SAP to WXS)
- Type: The type of the Communication (e.g., Update, or Divert Confirm)
- Message: The message text logged
- Timestamp: The timestamp when the log entry was created

The host log entries to show in the list can be filtered either by specifying the start and ‘To’ date or by specifying the time period from the ‘Time periods’ dropdown (Today, Yesterday, This Week etc.)

The number of log entries to show on one page can be selected using the ‘Show x entries’ at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the ‘Previous’ and ‘Next’ buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for host log entries using the ‘Search’ box located at the top right of the list

The user can also export the host log entries data to a CSV file or to an Excel file by clicking on the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

15.2 PLC Log

[Host Interface](#) > [PLC Log](#)

The PLC log will be shown

The fields shown in the list for each PLC log entry will be –

- The PLC log entries to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of log entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for PLC log entries using the 'Search' box located at the top right of the list

The user can also export the PLC log entries data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

Host Interface > Truncation Log

The truncation log will be shown

The fields shown in the list for each truncation log entry will be –

- Source: The source shall be Truncation
- Type: The Type will be which database table was Truncated
- Message: The message will show “xx,xxx records were deleted from <database>.<table>”
- Timestamp: The timestamp when the log entry was created

The truncation log entries to show in the list can be filtered either by specifying the start and ‘To’ date or by specifying the time period from the ‘Time periods’ dropdown (Today, Yesterday, This Week etc.)

The number of log entries to show on one page can be selected using the ‘Show x entries’ at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the ‘Previous’ and ‘Next’ buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for truncation log entries using the ‘Search’ box located at the top right of the list

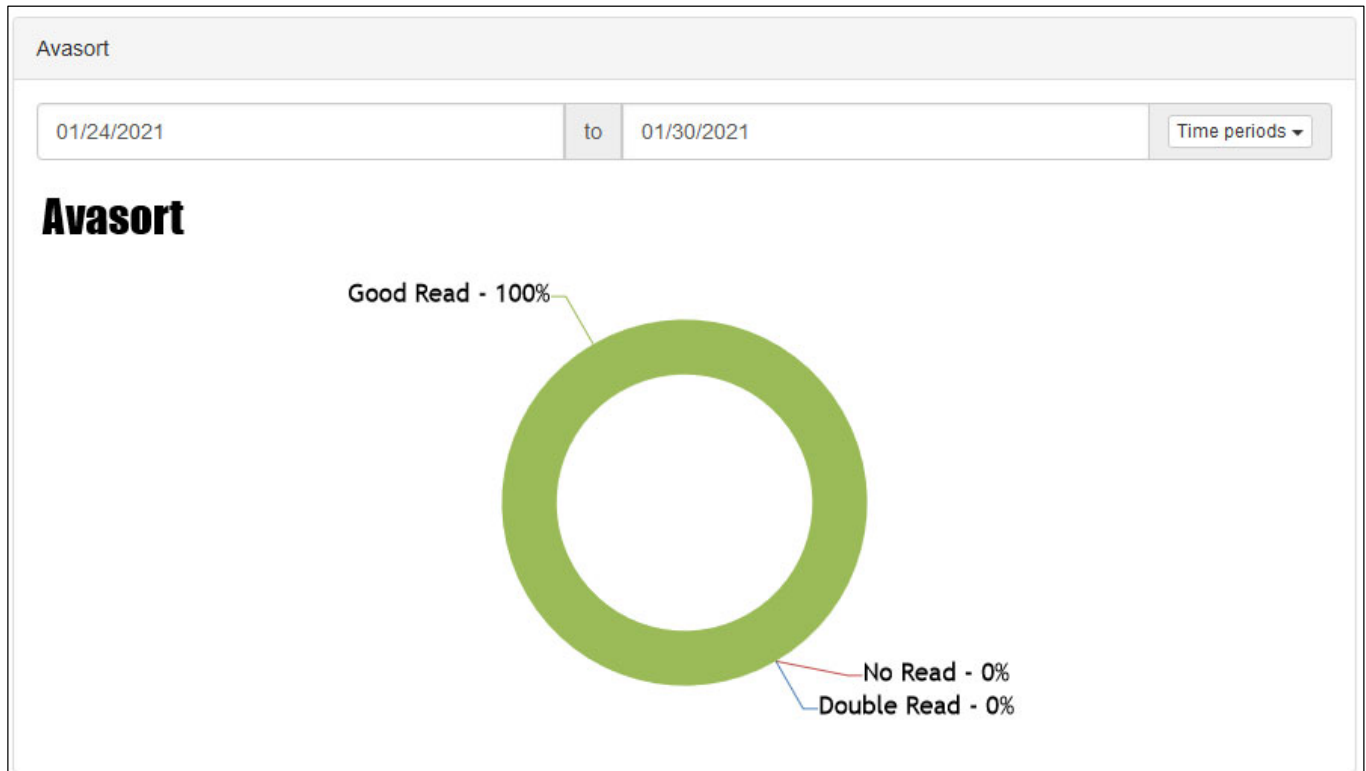
The user can also export the truncation log entries data to a CSV file or to an Excel file by clicking on the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

16 Scanners

16.1 Scanner Statistics

[Scanners](#) > [Statistics](#)

This shows the statistics for each scanner



The chart is shown as Pie Chart, which shows the percentage of Good Read, No Read and Double Read

The data to show in the chart can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

16.2 Scan Log

[Scanners](#) > [Log](#)

This shows the logs for all scanners

Scan Log

PH CheckWeigh

01/24/2021to01/30/2021Time periods

Show10entriesSearch:

Barcode	Timestamp
00000000000008378299	2021-01-25 08:29:19
00000000000008378300	2021-01-25 08:29:25
00000000000008377674	2021-01-25 08:29:30
????????????????	2021-01-25 08:29:36
00000000000008379627	2021-01-25 08:29:52
00000000000008381464	2021-01-25 08:30:59
00000000000008378396	2021-01-25 08:31:06
00000000000008381463	2021-01-25 08:31:09
00000000000008381465	2021-01-25 08:31:20
00000000000008379905	2021-01-25 08:31:34

Showing 1 to 10 of 6,782 entries

< Previous12345...679Next >

Export data to CSVExport data to Excel

Each record in the list shows the barcode scanned and the timestamp of when the scan was done

Clicking on a barcode will, if enabled, will take the user to the carrier's tracking site

The data to show in the chart can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of logs to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for a log using the 'Search' box located at the top right of the list

The user can also export the log data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

17 Sortation

17.1 Sort Routes

Sortation > Sort Routes

The sort routes consisting of 4 tab options – ‘Routes’, ‘Sorters’, ‘Lanes’ and ‘Criterias’ will be shown

The screenshot shows the 'Routes' tab selected. On the left, under 'Sorters', there's an 'Inbound' section with three lanes: Lane 1 (UPS), Lane 2a (FedEx), and Lane 3 (UPS). To the right, there's a list of criteria with checkboxes: dhl -, FedEx -, and UPS - UPS Tracking. Above this list are buttons for 'Add New Lane' and 'Assign Criteria'. At the top right, there are 'Inbound' and 'Outbound' buttons.

17.1.1 Criterias

Clicking on criterias tab will show the list of criterias as shown below

The screenshot shows the 'Criterias' tab. At the top right is a 'Create' button. Below it, there's a search bar and a 'Show 10 entries' dropdown. The main area contains a table with the following data:

Name	Description	Actions
dhl		Edit Delete
FedEx		Edit Delete
UPS	UPS Tracking	Edit Delete

At the bottom, it says 'Showing 1 to 3 of 3 entries'. There are also buttons for 'Export data to CSV' and 'Export data to Excel'.

The fields shown in the list for each criteria are –

- Name : The name of the criteria
- Description: The description of the criteria
- Actions : The actions that can be done on the criteria viz. Edit/Delete

The number of criterias to show on one page can be selected using the ‘Show x entries’ at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the ‘Previous’ and ‘Next’ buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for criterias using the 'Search' box located at the top right of the list

The user can also export the criteria data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

17.1.1.1 Create

Clicking on Create button takes user to create criteria

Criteria

Name

Description

Rules

☐ Code starts with

☐ Find
within

☐ Code ends with

☐ Code contains
number of characters

☐ Code equals

☐ Code does not equal

☐ The
character of code is

☐ The
character from end of code is

☐ Characters
through
are equal to

☐ Code is alphanumeric

Create New Criteria

The following fields need to be filled

- Name : The name of the criteria
- Description: The description of the criteria
- Rules : One or more rules can be set by selecting the checkbox next to the rule and filling in the rule text
Once the above information is filled in, the pressing on 'Create New Criteria' will create the new criteria in the system and it will be available in the system list

17.1.1.2 Edit

Select a criteria from the criteria list which is to be edited and press on the Edit link for the criteria. This takes the user to the edit page as shown below

Edit Criteria

Name

Description

Rules

☐ Code starts with

☐ Find within

☐ Code ends with

☐ Code contains number of characters

☒ Code equals

☐ Code does not equal

☐ The character of code is

☐ The character from end of code is

☐ Characters through are equal to

☐ Code is alphanumeric

Save Criteria

The user can update the fields which are required and after pressing 'Save Criteria', the criteria is saved

17.1.1.3 Delete

Select a criteria from the criteria list which is to be deleted and press on the Delete link for the criteria and the criteria will be deleted

17.1.2 Lanes

Clicking on the Lanes tab will show a page with Inbound lanes list and Outbound lanes list

Lanes

Create

Inbound

Show 10 entries

Search:

Sorter	Lane Number	Lane Description	Actions
Inbound	3	Lane 3	Edit Delete
Inbound	2	Lane 2a	Edit Delete
Inbound	1	Lane 1	Edit Delete

Showing 1 to 3 of 3 entries

< Previous

1

Next >

Export data to CSV

Export data to Excel

Outbound

Show 10 entries

Search:

Sorter	Lane Number	Lane Description	Actions
Outbound	4	Lane 4	Edit Delete
Outbound	3	Lane 3	Edit Delete
Outbound	2	Lane 2	Edit Delete
Outbound	1	Lane 1	Edit Delete

Showing 1 to 4 of 4 entries

< Previous

1

Next >

Export data to CSV

Export data to Excel

The fields shown for both Inbound and Outbound list are

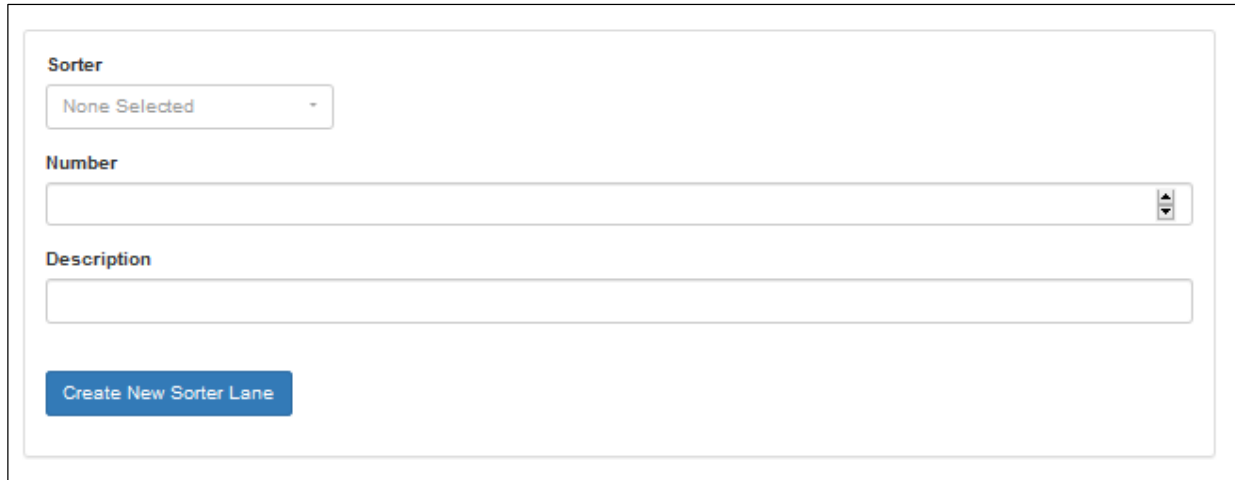
- Sorter: Inbound or Outbound
- Lane number: The lane number
- Lane description : The lane description
- Actions: The actions that can be performed – Edit/Delete

For both the Inbound list and the Outbound list

- The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list
- Clicking on a column header in the list toggles the sort order for the list between ascending and descending
- The user can search for lane using the 'Search' box located at the top right of the list
- The user can also export the lane data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

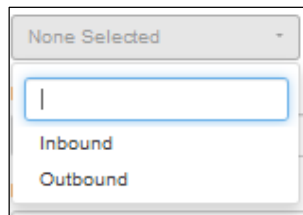
17.1.2.1 Create

Clicking on the Create button takes the user to create an entry for both Inbound and Outbound lane



The following fields need to be filled

- Sorter: Select from the dropdown , either 'Inbound' or 'Outbound'



- Number : The lane number
- Description: The description of the lane

On clicking in 'Create New Sorter Lane' a new 'Inbound' or 'Outbound' lane will be created depending on what was selected in the Sorter dropdown, and the lane will be displayed in the corresponding 'Inbound' or 'Outbound' lane list

For both 'Inbound' and 'Outbound' lanes

17.1.2.2 Edit

Select a lane from the list which is to be edited and press on the Edit link for the lane. This takes the user to the edit page as shown below

Edit Sorter Lane

Sorter

Inbound

Number

3

Description

Lane 3

Save Sorter Lane

The user can update fields as required and after pressing 'Save Sorter Lane', the changes will be saved

17.1.2.3 Delete

Select a lane from the lane list which is to be deleted and press on the Delete link for the lane and the lane will be deleted

17.1.3 Sorters

Clicking on the Sorters tab will show the sorters list

Sorters Create

Sorters

Show 10 entries

Search:

Name	Actions
Outbound	Edit Delete
Inbound	Edit Delete

Showing 1 to 2 of 2 entries

< Previous

1

Next >

Export data to CSV

Export data to Excel

The fields shown are

- Name: The name of the sorter
- Actions: The actions that can be performed on each sorter – Edit/Delete

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

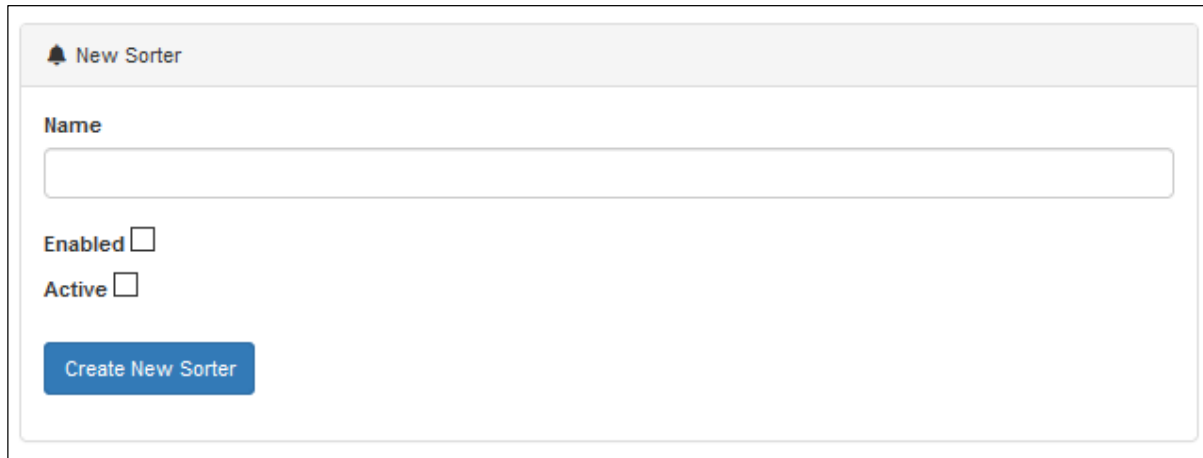
Clicking on a column header in the list toggles the sort order for the list between ascending and descending

The user can search for sorter using the 'Search' box located at the top right of the list

The user can also export the sorter data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

17.1.3.1 Create

Clicking on the Create button takes the user to a page to create an entry for a new sorter

The screenshot shows a web form titled 'New Sorter' with a bell icon. It contains a text input field for 'Name', two checkboxes for 'Enabled' and 'Active', and a blue button labeled 'Create New Sorter'.

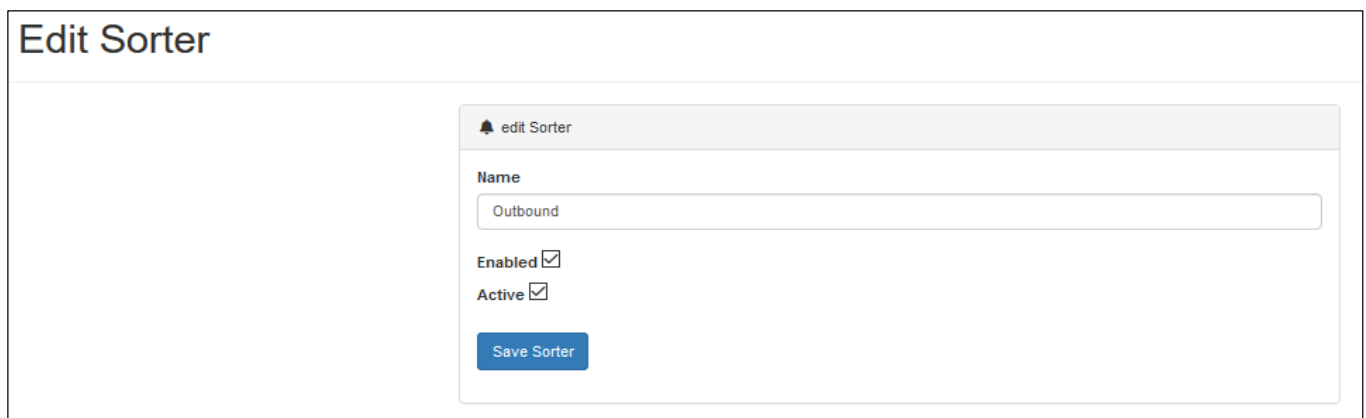
The following fields need to be filled

- Name: The name of the sorter
- 'Enabled' checkbox: Checking this checkbox makes the sorter 'enabled' which means it can be used
- 'Active' checkbox: Checking this checkbox makes the sorter 'active' which means not only is it 'enabled' but also that it is currently being used

Clicking on the 'Create New Sorter' will create the new sorter and it will now appear in the Sorter list

17.1.3.2 Edit

Select a sorter from the list which is to be edited and press on the Edit link for the sorter. This takes the user to the edit page as shown below

The screenshot shows a web form titled 'Edit Sorter' with a bell icon. It contains a text input field for 'Name' with the value 'Outbound', two checked checkboxes for 'Enabled' and 'Active', and a blue button labeled 'Save Sorter'.

The user can update fields as required and after pressing 'Save Sorter', the changes will be saved

17.1.3.3 *Delete*

Select a sorter from the sorter list which is to be deleted and press on the Delete link for the sorter and the sorter will be deleted

17.1.4 Routes

This shows sort routes in the system as below

Sorters	Assign Criteria
Inbound Lane 1 UPS Lane 2a FedEx Lane 3 UPS	<input type="checkbox"/> dhl - <input type="checkbox"/> FedEx - <input type="checkbox"/> UPS - UPS Tracking

The section on left hand side shows a table with list of either Inbound or Outbound sorters. Inside each sorter the lanes and the criterias within the lanes are shown

Clicking on the 'Inbound' button at top left of the screen filters the sorters to show only sorters with Inbound lanes. Similarly clicking on the 'Outbound' button filters the sorters to show only sorters with 'Outbound' lanes.

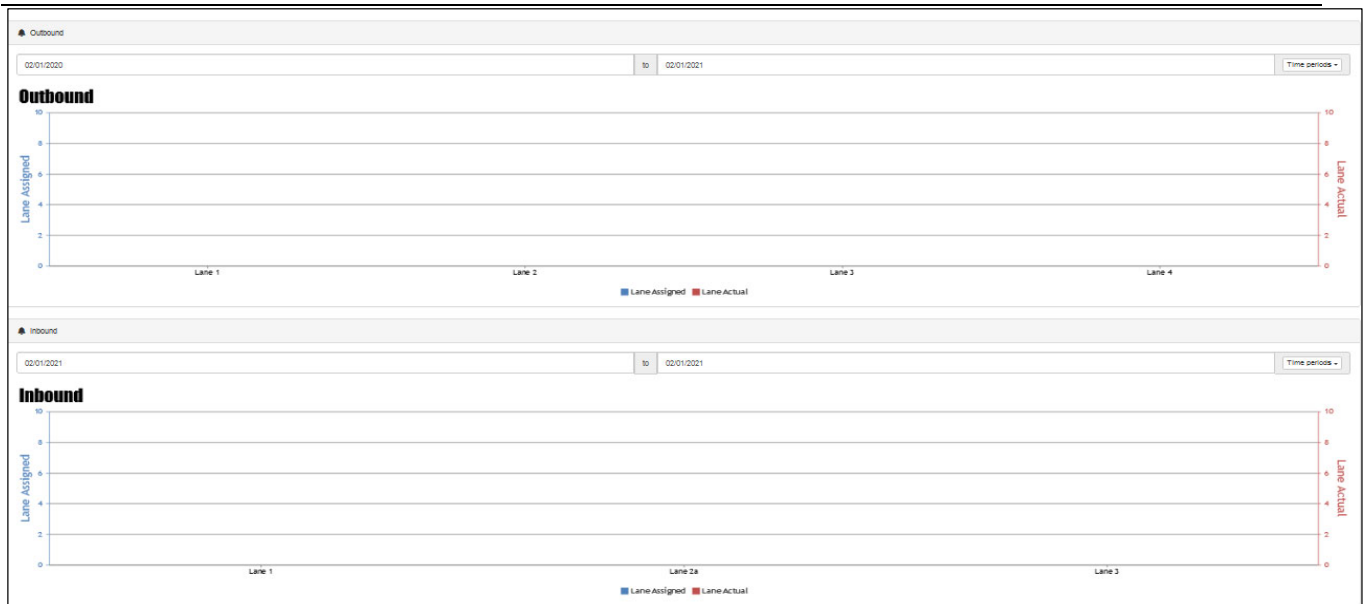
There is also a 'Add New Lane' button clicking on which takes the user to create a new sorter lane (the same as can be done by clicking on the 'Lanes' tab and there clicking on 'Create')

The section on the right hand side shows a list of names of criterias in the system. Select the criterias you want by clicking on the checkbox next to them and then click on 'Assign Criteria', which will assign the criterias to the lanes listed in the section on the left hand side

17.2 Statistics

Sortation > Statistics

The sortation statistics will be shown.



This shows a bar graph for the sorters. Two graphs – one for ‘Outbound’ and one for ‘Inbound’ are shown. On the X-axis the Lanes configured for the sorters are shown. On the Y-axis, the value of ‘Total Sort’ and value of ‘Total Verification’ is shown for each Lane.

The value of ‘Total Sort’ is shown in ‘Dark Blue’ color and the scale for ‘Total Sort’ value is specified on the Y-axis line on the left hand side. The value of ‘Total Verification’ is shown in ‘Dark Red’ color and the scale for ‘Total Verification’ value is specified on the Y-axis line on the right hand side.

The data to show in the list can be filtered either by specifying the start and ‘To’ date or by specifying the time period from the ‘Time periods’ dropdown (Today, Yesterday, This Week etc.)

17.3 Simulator

Sortation > Simulator

This will bring up the sortation simulator

Sortation Simulator

Shipping

Enter Code Here

Code

Run Simulation

Clear Last Simulation

Lane

Lane

Weight_Assigned

Weight_Assigned

Weight_Manifest

Weight_Manifest

result4

result4

The user can enter a barcode/container ID in the ‘Enter Code here’ input box and the after pressing ‘Run Simulation’ button, the results will be shown such as if they were simulating the container running on the conveyor line.

The result shown will consist of any parameters that were set up

Pressing on ‘Clear Last Simulation’ will clear the current simulation

18 Weight & Dimension

18.1 Set Points

Weight & Dimensions > Set Points

The set points for Weight Tolerance are shown

Set Points

Set Points

Over %	<input type="text" value="20.00"/>	Under %	<input type="text" value="20.00"/>	Min Weight	<input type="text" value="0.00"/>	Max Weight	<input type="text" value="2.00"/>
Over %	<input type="text" value="5.00"/>	Under %	<input type="text" value="5.00"/>	Min Weight	<input type="text" value="5.00"/>	Max Weight	<input type="text" value="10.00"/>
Over %	<input type="text" value="10.00"/>	Under %	<input type="text" value="10.00"/>	Min Weight	<input type="text" value="2.00"/>	Max Weight	<input type="text" value="5.00"/>

Submit

Add Weight Tolerance

By default, there is one row of (set points) shown. Each row has the following four columns:

- **Over %:** This column shows the weight tolerance allowed in percentage where actual weight is over the allowed weight limits (as specified in min weight and max weight columns).
- **Under %:** This column shows the weight tolerance allowed in percentage where actual weight is under the allowed weight limits (as specified in min weight and max weight columns).
- **Min Weight:** This column shows the min weight required
- **Max Weight:** This column shows the max weight allowed

Example: A container has an Assigned Weight of 4.5 units, therefore during lookup that falls between 2.00 and 5.00 units, and thus the tolerance for OVER is 10% and UNDER is 10%. Using those setpoints, a carton of with an Assigned Weight of 4.5 units, would PASS if the Measured Weight fell between 4.05 and 4.95 units.

To add another set point click on the 'Add Weight Tolerance' button. This is create a blank row for new entry as shown below

Set Points

Set Points

Over %	20.00	Under %	20.00	Min Weight	0.00	Max Weight	2.00
Over %	5.00	Under %	5.00	Min Weight	5.00	Max Weight	10.00
Over %	10.00	Under %	10.00	Min Weight	2.00	Max Weight	5.00
Over %		Under %		Min Weight	Min Weight	Max Weight	Max Weight

Submit

Add Weight Tolerance

Fill all the four columns 'Over %','under %', 'Min Weight' and 'Max Weight' and press on Submit and the weight tolerance will be added to the system

18.2 Exception Logs

[Weight & Dimensions](#) > [Exception Logs](#)

The exception logs for weight are shown

Weight

Exception Logs

01/27/2021

to

01/27/2021

Time periods ▾

Show 10 ▾ entries

Search:

Carton ID	Sorter ID	Weight Assign	Weight Actual	Result	Over Under	Timestamp
No data available in table						

Showing 0 to 0 of 0 entries

< Previous

Next >

Export data to CSV

Export data to Excel

The following fields are shown

- Carton ID: The container ID of the package
- Sorter ID: The ID of the sorter that sorted the package
- Weight Assign: The weight that was assigned to the package by the Host
- Weight Actual: The actual weight of the package as measured by the MHE
- Result: Pass/Over/Under
- Over/Under %: The +/- difference in weight shown as a percent of the Assigned Weight
- Over/Under +/- Difference: The +/- Difference in weight above or below the Assigned Weight

-
- **Timestamp:** The timestamp of when the weighing was done

The exception log entries to show in the list can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

The number of entries to show on one page can be selected using the 'Show x entries' at the top left of the list. The default is 10. The entries currently being showed are shown at the bottom left of the list. The user can move to next and previous entries using the 'Previous' and 'Next' buttons at the bottom right of the list

Clicking on a column header in the list toggles the sort order for the list between ascending and descending

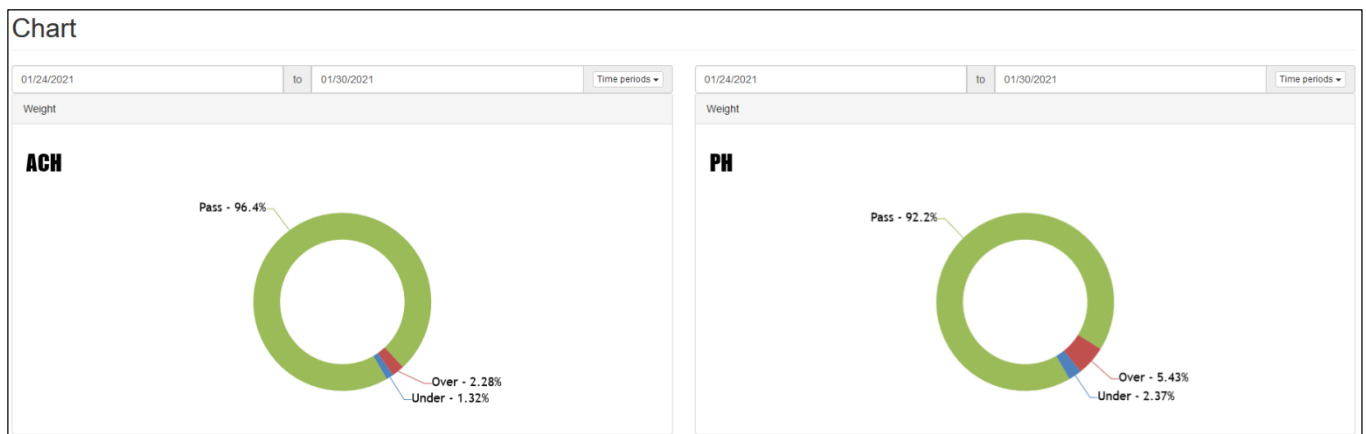
The user can search for exception log using the 'Search' box located at the top right of the list

The user can also export the exception logs data to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

18.3 Chart

Weight & Dimensions > Chart

This shows the weight charts for each scanner/lane?



The chart is shown as Pie Chart, which shows the percentage of Overweight, Underweight and Pass weighing

The data to show in the chart can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

19 CMMS

19.1 Dashboard

CMMS > Dashboard

The landing page will be shown as below

Dashboard

Past due tasks 3

Title	Asset	Assignee	Status	Next Occurring	Recurring Time
Single 2021-04-20	P101	Mr. Randy Hudson II	Active	2021-04-20	Daily
Single 2021-05-08	P101	Loren Rose	Active	2021-05-08	Daily
Every One Week	DP01	Mr. Sherrin Rayner Jr.	Active	2021-05-10	Weekly

Showing 1 to 3 of 3 entries (filtered from 8 total entries)

Tasks due this week 0

No matching records found

Tasks due next week 0

No matching records found

Tasks due this month 2

Title	Asset	Assignee	Status	Next Occurring	Recurring Time
1st of each month	P101	Paul Castro	Active	2021-05-15	Monthly
Every 15 days	P101	Paul Castro	Active	2021-05-16	Daily

Showing 1 to 2 of 2 entries (filtered from 8 total entries)

The dashboard has four sections

19.1.1 Task Due Count across Time Periods section

This section shows the task due counts across various time periods as below

Past due tasks 3

Manage Tasks

Tasks due this week 0

Manage Tasks

Tasks due next week 0

Manage Tasks

Tasks due this month 2

Manage Tasks

Task due counts across four time periods are shown

1. Past due tasks: This shows the count of tasks which are past the due dates
2. Tasks due this week: This shows the count of tasks which are due this week
3. Tasks due next week: This shows the count of tasks which are due next week
4. Tasks due this month: This shows the count of tasks which are due this month

Clicking on 'Manage Tasks' in a specific time period box , loads the due tasks for that time period , in the task list grid for that respective time period

So for e.g. if you click on 'Manage Tasks' in the 'Past due tasks' box, then the tasks for time period past due, will be populated in the 'Past due tasks' task list (grid)

19.1.2 Past due tasks section

This section will show the list of past due tasks as shown below

Past due tasks

Show10entries

Search:

Title	Asset	Assignee	Status	Next Occurring	Recurring Time
Single 2021-04-30	P101	Mr. Randy Hudson II	Active	2021-04-30	Daily
Single 2021-05-06	P101	Leilani Robel	Active	2021-05-06	Daily
Every One Week	CP01	Mrs. Breanna Raynor Jr.	Active	2021-05-10	Weekly

Showing 1 to 3 of 3 entries (filtered from 6 total entries)

Export data to CSV

Export data to Excel

The following fields will be shown for each task

- Title: The title of the task
- Asset: The unit tag of the asset
- Assignee: The person to whom the task is assigned
- Status: The status of the task
- Next Occurring: The date of next occurrence of task
- Recurring Time: The recurring time of task – Daily, Monthly, Weekly or Yearly

The number of past due tasks to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for past due tasks based on keyword specified in the search box

The past due tasks list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of past due tasks currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.1.3 Tasks due this week section

This section will show the list of tasks due this week as shown below

Tasks due this week

Show 10 entries

Search:

Title	Asset	Assignee	Status	Next Occurring	Recurring Time
No matching records found					

Showing 0 to 0 of 0 entries (filtered from 6 total entries)

< Previous Next >

Export data to CSV Export data to Excel

The following fields will be shown for each task

- Title: The title of the task
- Asset: The unit tag of the asset
- Assignee: The person to whom the task is assigned
- Status: The status of the task
- Next Occurring: The date of next occurrence of task
- Recurring Time: The recurring time of task – Daily, Monthly, Weekly or Yearly

The number of tasks due this week to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for tasks due this week based on keyword specified in the search box

The tasks due this week list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of tasks due this week currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.1.4 Tasks due next week section

This section will show the list of tasks due next week as shown below

The screenshot displays the 'Tasks due next week' section. At the top left, there is a 'Show' dropdown menu set to '10' and the text 'entries'. To the right is a 'Search:' input field. Below these is a table with the following headers: 'Title', 'Asset', 'Assignee', 'Status', 'Next Occurring', and 'Recurring Time'. Each header has a small upward arrow icon next to it, indicating sorting options. The table body is empty, and a message 'No matching records found' is displayed below the headers. At the bottom left, it says 'Showing 0 to 0 of 0 entries (filtered from 6 total entries)'. At the bottom right, there are two buttons: 'Export data to CSV' and 'Export data to Excel'.

The following fields will be shown for each task

- Title: The title of the task
- Asset: The unit tag of the asset
- Assignee: The person to whom the task is assigned
- Status: The status of the task
- Next Occurring: The date of next occurrence of task
- Recurring Time: The recurring time of task – Daily, Monthly, Weekly or Yearly

The number of tasks due next week to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for tasks due next week based on keyword specified in the search box

The tasks due next week list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of tasks due next week currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.1.5 Tasks due this month section

This section will show the list of tasks due this month as shown below

Tasks due this month

Show 10 entries

Search:

Title	Asset	Assignee	Status	Next Occurring	Recurring Time
15th of each month	P101	Paul Castro	Active	2021-06-15	Monthly
Every 15 days	P101	Paul Crmst	Active	2021-06-16	Daily

Showing 1 to 2 of 2 entries (filtered from 6 total entries)

< Previous 1 Next >

Export data to CSV

Export data to Excel

The following fields will be shown for each task

- Title: The title of the task
- Asset: The unit tag of the asset
- Assignee: The person to whom the task is assigned
- Status: The status of the task
- Next Occurring: The date of next occurrence of task
- Recurring Time: The recurring time of task – Daily, Monthly, Weekly or Yearly

The number of tasks due this month to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for tasks due this month based on keyword specified in the search box

The tasks due this month list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of tasks due this month currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.2 Assets

CMMS > Assets

19.2.1 Assets List

The landing page will show the list of assets in the system

Assets Add New Asset

Assets

Show 10 entries Search:

Unit Tag	Parent	Type	Use	Model Number	Serial Number	In Service Date	In Service	Status	Actions
CP01		Control Panel	Controlling Things			2021-04-01	0y 1m	Active	Copy/Duplicate Edit View Delete
P101		Belted Conveyor	Throw On Lane	M-14-WNRSM	SN123456789	2021-03-01	0y 2m	Active	Copy/Duplicate Edit View Delete
L_P101-A	P101	Spur				2021-03-01	0y 2m	Active	Copy/Duplicate Edit View Delete

Showing 1 to 3 of 3 entries < Previous 1 Next >

Export data to CSV Export data to Excel

The fields shown for each asset in the list are

- Unit Tag: The unit tag of the asset
- Parent: The parent of the asset
- Type: The type of the asset
- Model Number: The model number of the asset
- Serial Number: The serial number of the asset
- In Service Date: The date since when the asset is in service. This will be shown in red background if
- In Service: This shows the duration for which the asset is in service in years and months
- Status: The status of the device. This can be 'Active'/'Inactive'/'Retired' or 'In Repair'
- Actions: The Actions that can be taken on the device which are 'Copy/Duplicate', 'Edit', 'View' and 'Delete'. These are explained in more detail in following sections

The background color of rows of those assets which are Parent Assets are set to blue color, while Child Assets are shown in white color

The number of assets to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for assets based on keyword specified in the search box

The assets list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of assets currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.2.2 Actions

19.2.2.1 Copy/Duplicate

This action allows user to create a copy/duplicate of an asset. Clicking on this option for an asset brings up the following screen

On this screen the field values from the original asset which is being duplicated/copied will be prefilled. The user can change the values as required and press 'Save Asset' to save the asset.

Note: The unit tag of the new asset has to be different from the original asset else a 'Duplicate' error will result

Clicking on 'Back to Asset' will take the user back to Assets List without saving the changes

19.2.2.2 Edit

This action allows user to edit an asset. Clicking on this option for an asset brings up the following screen

The screenshot shows the 'Edit Asset' form. At the top right is a 'Back to Asset' button. The form contains the following fields and options:

- Parent:** A dropdown menu with the text 'Please Select Parent' and a downward arrow.
- Unit Tag:** A text input field containing 'P101'.
- Type:** A text input field containing 'Belted Conveyor'.
- Use:** A text input field containing 'Throw On Lane'.
- Model Number:** A text input field containing 'M-14-WINRSM'.
- Serial Number:** A text input field containing 'SN123456789'.
- In Service Date:** A text input field containing '2021-03-01'.
- Status:** A group of four radio buttons: 'Active' (selected), 'Inactive', 'Retired', and 'In-Repair'.
- Save Asset:** A blue button at the bottom left of the form.

The user can update the values of the fields as required and then pressing on 'Save Asset' will save the changes

Clicking on 'Back to Asset' will take the user back to assets list without saving the changes

19.2.2.3 View

This action allows user to view an asset. Clicking on this option for an asset brings up the View Asset screen

View Asset

View Asset

+ Add Note

Unit Tag	P101
Type	Belted Conveyor
Use	Throw On Lane
Model Number	M-14-WNR5M
Serial Number	SN123456789
In Service Date	2021-03-01
Status	Active

Tasks For This Asset

Show 10 entries

Search:

Assignee User	Title	Recurring Time	Next Occurring
Paul Crmet	Every 15 days	Daily	2021-05-04
Paul Castro	15th of each month	Monthly	2021-05-15
Lellani Robel	Single 2021-05-06	Single instance	2021-05-06
Mr. Randy Hudson II	Single 2021-04-30	Single instance	2021-04-30

Showing 1 to 4 of 4 entries

< Previous

1

Next >

Notes For This Asset

Show 10 entries

Search:

User	Note	Created	Action
TransTech	Note for Asset	2021-05-31 02:31:43	Edit Delete

Showing 1 to 1 of 1 entries

< Previous

1

Next >

This has three sections as below

19.2.2.3.1 View Asset Section

This section shows asset details as shown below

View Asset

+ Add Note

Unit Tag	P101
Type	Belted Conveyor
Use	Throw On Lane
Model Number	M-14-WNR5M
Serial Number	SN123456789
In Service Date	2021-03-01
Status	Active

The following information is shown

- Unit tag: The unit tag of the asset
- Use: The use of the asset
- Model Number: The Model number of the asset

- Serial Number: The Serial number of the asset
- Status: The status of the asset

Notes can also be added for the asset clicking on the 'Add Note' button. This brings up the following pop-up screen

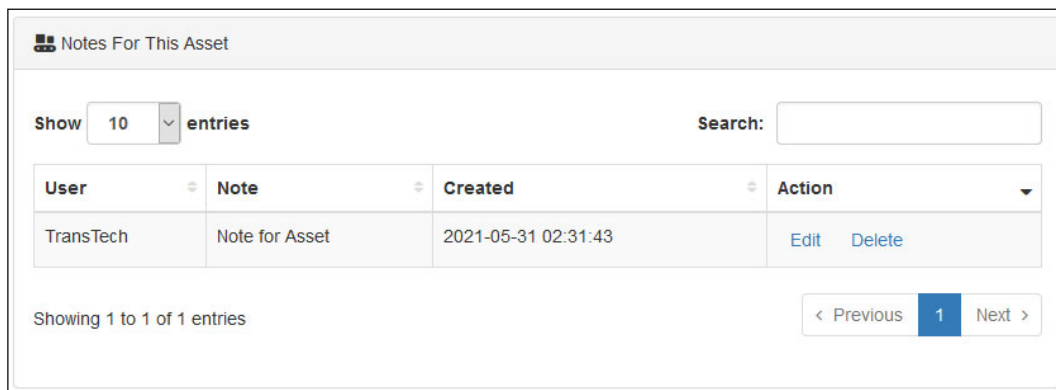


The 'Asset Note' pop-up screen features a title bar with a close button (X). Below the title is a label 'Note:' followed by a text input field with the placeholder text 'Enter your note here'. At the bottom right of the form are two buttons: 'Submit' (in blue) and 'Close' (in white).

The user can enter a note for the asset and after pressing on 'Submit' button the note will be added to the asset. Pressing on 'Close' will close the screen without saving

19.2.2.3.2 Notes for This Asset Section

This section shows the list of notes for this asset



The 'Notes For This Asset' section includes a title bar with a list icon. Below the title, there is a 'Show' dropdown menu set to '10' and a 'Search:' text input field. The main content is a table with the following structure:

User	Note	Created	Action
TransTech	Note for Asset	2021-05-31 02:31:43	Edit Delete

Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are navigation buttons: '< Previous', '1' (highlighted), and 'Next >'.

The following fields are shown for each note in the list

- User: The user who created the note
- Note: The text of the note
- Created: The date time stamp of when this note was created
- Action: 'Edit' or 'Delete'

The number of notes to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for notes based on keyword specified in the search box

19.2.2.3.2.1 Edit Note

Clicking on 'Edit' button brings up the pop-up screen for editing as shown below

Asset Note

Note:

Note for Asset

Submit
Close

After modifying the note text as desired, press on the 'Submit' to save the changes and close the pop-up, while pressing on the 'Close' button will close the pop-up without saving the changes

19.2.2.3.2.2 Delete Note

Clicking on 'Delete' button will delete asset note after confirmation from the user

19.2.2.3.3 Tasks For This Asset Section

This section shows the list of tasks added for this asset

Tasks For This Asset

Show 10 entries
Search:

Assignee User	Title	Recurring Time	Next Occurring
Paul Crmst	Every 15 days	Daily	2021-05-24
Paul Castro	15th of each month	Monthly	2021-05-15
Leilani Robel	Single 2021-05-06	Single Instance	2021-05-06
Mr. Randy Hudson II	Single 2021-04-30	Single Instance	2021-04-30

Showing 1 to 4 of 4 entries
< Previous 1 Next >

The following fields are shown for each task in the list

- Assignee User: The user to whom this task is assigned
- Title: The title of the task
- Recurring Time: The recurrence of the task (Single Instance, Daily, Monthly etc.)
- Next Occurring: The date of next occurrence of the task

The number of tasks to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for tasks based on keyword specified in the search box

Clicking on 'Back to Asset' button will take the user back to the list of assets

19.2.2.4 Delete

Clicking on 'Delete' will delete the asset after confirmation from the user

19.2.3 Add New Asset

This will bring up the screen to add a new asset as shown below

The following fields can be added for the asset

- Parent: Select a parent asset from Parent dropdown which lists the assets already in the system
- Unit Tag: The unit tag of the asset. This is a required field. This needs to be unique else a duplicate error will be shown
- Type: The type of the asset. This is a required field
- Use: The use of the asset
- Model Number: The model number of the asset
- Serial Number: The serial number of the asset
- In Service Date: The date of which the asset was placed into service
- Status: The current status of the asset

Pressing on the 'Create New Asset' button will create the asset after validations and the user back to the assets list. Pressing on 'Back to Asset' will take the user back to assets list without saving changes

19.3 Tasks

CMMS > Tasks

19.3.1 Tasks List

The landing page will show the list of tasks in the system

Tasks							Add New Task
Tasks							
Show	10	entries	Search:				
Assignee	Asset	Title	Status	Recurring Time	Next Occurring	Actions	
Paul Crmst	P101	Every 15 days	Active	Daily	2021-05-24	View Edit Delete	
Paul Castro	P101	15th of each month	Active	Monthly	2021-05-15	View Edit Delete	
Ms. Ella Parker DDS	CP01	Each Year	Active	Yearly	2022-04-30	View Edit Delete	
Mrs. Breanna Raynor Jr.	CP01	Every One Week	Active	Weekly	2021-05-10	View Edit Delete	
Mr. Randy Hudson II	P101	Single 2021-04-30	Active	Single Instance	2021-04-30	View Edit Delete	
Leilani Robel	P101	Single 2021-05-06	Active	Single Instance	2021-05-06	View Edit Delete	
Showing 1 to 6 of 6 entries							< Previous 1 Next >
Export data to CSV				Export data to Excel			

The fields shown for each task in the list are

- Assignee: The person to whom the task is assigned
- Asset: The unit tag of the asset
- Title: The title of the task
- Status: The status of the task
- Recurring Time: The recurrence of the task. This can be 'Single Instance', 'Daily', 'Monthly' or 'Yearly'
- Next Occurring: The date of the next occurrence of the task
- Actions: The Actions that can be taken on the task which are 'View', 'Edit', and 'Delete'. These are explained in more detail in following sections

The number of tasks to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for tasks based on keyword specified in the search box

The task list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of tasks currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.3.2 Actions

19.3.2.1 View

This action allows user to view a task. Clicking on this option for a task brings up the View Task screen

View Task

Back to Task

View Task

Assignee Paul Castro

Asset P101

Title 15th of each month

Description

Status Active

Task Type Recurring

Next Occurrence 2021-06-15

Recurring Time Monthly

Last Skipped 2021-05-13

Mark Complete
Snooze
Skip this Occurance

Task History

Show 10 entries

Search:

Type	Assignee User	History At
complete	TransTech	2021-06-01 02:19:40
skip	TransTech	2021-06-01 02:19:17
snooze	Super User	2021-05-11 15:42:37

Showing 1 to 3 of 3 entries

< Previous

1

Next >

This has two sections as below

19.3.2.1.1 View Task Section

This section shows task details as shown below

View Task

Assignee Paul Castro

Asset P101

Title 15th of each month

Description

Status Active

Task Type Recurring

Next Occurrence 2021-06-15

Recurring Time Monthly

Last Skipped 2021-05-13

Mark Complete
Snooze
Skip this Occurance

The following information is shown

- Assignee: The person to whom the task is assigned
- Asset: The unit tag of the asset
- Title: The title of the task
- Description: The description of the task
- Task Type: The type of the task – ‘Recurring’ or ‘Single Instance’
- Next Occurrence: The date of next occurrence of the task
- Recurring Time: If task type is ‘Recurring’ , then this will specify the Recurring type -‘Single Instance’, ‘Daily’, ‘Monthly’ or ‘Yearly’
- Last Skipped: This will indicate the date on which the task was last skipped
- Mark Complete: The button enables a user to mark a task as complete. When a task is marked as complete an entry will be made in history of the task
- Snooze: The button enables a user to snooze a task. Clicking on this button will bring up the following pop-up screen



The pop-up screen titled 'Snooze this Task' contains two input fields. The first is a dropdown menu currently set to 'Days'. The second is a text input field containing 'Days 1 - 7 or Week 1 to 4'. At the bottom right, there are two buttons: 'Close' and 'Snooze'.

The task can be snoozed for Days or for Weeks by choosing the corresponding value from the dropdown. If ‘Days’ is selected then the value for number of days must be between 1 and 7 (as shown in prompt text).

If ‘Weeks’ is selected, then the value for number of weeks must be between 1 and 4.

After selecting the snooze period clicking on ‘Snooze’ button will snooze the task for specified period.

Clicking on ‘Close’ button will close without saving. Once a Snooze is set for a task a corresponding entry will be made in history of the task

Note: Snooze is applicable only for those tasks whose type is ‘Recurring’

- Skip this Occurrence: The button enables a user to skip the current occurrence of a task. When ‘Skip this occurrence’ action is performed for a task an entry will be made in history of the task

19.3.2.1.2 Task History Section

This section shows the list of history entries for the task

Task History		
Show	10	entries
		Search: <input type="text"/>
Type	Assignee User	History At
complete	TransTech	2021-06-01 02:19:40
skip	TransTech	2021-06-01 02:19:17
snooze	Super User	2021-05-11 15:42:37

Showing 1 to 3 of 3 entries

< Previous 1 Next >

The following fields are shown for each history entry

- Type: The type of history entry – ‘Complete’, ‘Skip’ or ‘Snooze’
- Assignee User: The user to whom the task was assigned

-
- History At: The date time stamp when the history entry was created

The number of history entries to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for history entries based on keyword specified in the search box

The history list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

Clicking on 'Back to Task' button takes the user back to the task list

19.3.2.2 Edit

Clicking on 'Edit' button brings up the edit screen for the task as shown below

Edit Task

Assignee

Paul Castro

Asset

x P101

Click here to search

Title

15th of each month

Description

Status

☒ Active
 ☐ Inactive

Task Type

☒ Recurring
 ☐ Single Instance

Recurring Time

☐ Daily
 ☐ Weekly
 ☒ Monthly
 ☐ Yearly

Recurrence Pattern:

☒ Day 15 of every 1 Months(s)
 ☐ The First Mon of every 1 Months(s)

Save Task

The user can update the values of the fields as required and then pressing on 'Save Task' will save the changes.

Clicking on 'Back to Task will take the user back to task list without saving the changes

19.3.2.3 Delete Task

Clicking on 'Delete' button will delete task after confirmation from the user

19.3.3 Add New Task

This will bring up the screen to add a new task as shown below

New Task

Assignee

Please Select a Assignee

Asset

Click here to search

Title

Description

Status

☒ Active
 ☐ Inactive

Task Type

☒ Recurring
 ☐ Single Instance

Recurring Time

☒ Daily
 ☐ Weekly
 ☐ Monthly
 ☐ Yearly

Recurrence Pattern:

☐ Every 1 Day(s)
 ☒ Every Weekday
 ☒ Mon
 ☒ Tue
 ☒ Wed
 ☒ Thu
 ☒ Fri
 ☒ Sat
 ☒ Sun

Create New Task

The following fields can be added for a task

- Assignee: The user to whom this task is to be assigned
- Asset: The asset for which this task is to be added. This is a required field
- Title: The title of the task. This is a required field
- Description: The description of the task
- Status: The status of the task – 'Active' or 'Inactive'. The default value is 'Active'
- Task Type: The type of task – 'Single Instance' or 'Recurring'. Default is 'Recurring'
- Recurring Time: The recurring time of task – 'Daily', 'Weekly', 'Monthly' or 'Yearly'

- Recurrence pattern: The recurrence pattern of the task. The values for this depend on the value chosen for Recurring Time. These can be as follows

- When Recurring Time is set to 'Daily', then Recurrence pattern can have following values

Recurrence Pattern:

☐ Every Day(s)

☒ Every Weekday

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

The default is 'Every Weekday' with all days of week selected. The user can remove the days of week not required. Or the user can select the 'Every x number of Day(s)' where default value of x is 1 which means every day

- When Recurring Time is set to 'Weekly', then Recurrence pattern can have following values

Recurrence Pattern:

Every Week(s) On

☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat ☒ Sun

The default is 'Every 1 Week' on all days of week. The user can remove the days of week not required. Also the user can change the recurrence to be once every 'x' number of weeks (where x is integer) instead of every week for the days of week selected

- When Recurring Time is set to 'Monthly', then Recurrence pattern can have following values

Recurrence Pattern:

☒ Day of every Months(s)

☐ The of every Months(s)

The default is on Day 1 of every Month. The user can change to day of month desired and also whether recurrence will take place every month or once every 'x' number of months (where x is integer)

The other option the user has available is

Recurrence Pattern:

☐ Day of every Months(s)

☒ The of every Months(s)

Instead of a numeric value for day of month on which recurrence will occur, the user can select the first/second/third or fourth weekday of the month for which recurrence will occur and whether recurrence will take place every month or once every 'x' number of months (where x is integer)

- When Recurring Time is set to 'Yearly', then Recurrence pattern can have following values

Recurrence Pattern:

Every **Year(s)**

☐ On

☒ On The of every **Months(s)**

Here there can be two options

- Recurrence can happen once every 'x' number of years (where x is integer and default is 1), and on the first/second/third or fourth selected weekday of the month, every 'x' number of months (where x is integer and default is 1)
- Recurrence can happen once every 'x' number of years (where x is integer and default is 1), and on a specific day of a specific month

After filling in all the fields and pressing on the 'Create New Task', the new task will created in the system and user will be taken back to task list

Pressing on 'Back to Task' button will take user back to task list without saving the changes

19.4 Parts

CMMS > Parts

19.4.1 Parts List

The landing page will show the list of parts in the system

Parts Add New Part

Parts

Show 10 entries Search:

Name	Catalog Number	Quantity on Hand	Min Quantity	Max Quantity	Vendor	Asset Tags	Location	Actions
Digital Input Card	1769-IQ16	3	4	4	Pendant Automation, Inc	CP01		View Edit Delete

Showing 1 to 1 of 1 entries < Previous 1 Next >

Export data to CSV Export data to Excel

The fields shown for each part in the list are

- Name: The name of the part
- Catalog Number: The catalogue number of the part
- Quantity on Hand: The quantity of the part available
- Min Quantity: The minimum quantity of part required
- Max Quantity: The maximum quantity of part required
- Vendor: The name of the vendor supplying the part
- Asset Tags: The asset tag of the part
- Location: The location of the part
- Actions: The Actions that can be taken on the part which are 'View', 'Edit', and 'Delete'. These are explained in more detail in following sections

The number of parts to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for parts based on keyword specified in the search box

The part list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of parts currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.4.2 Actions

19.4.2.1 View

This action allows user to view the selected part. Clicking on this option for a part brings up the View Part screen

View Part

Back to Part

View Part

Vendor	Pendant Automation, Inc
Name	Digital Input Card
Description	16x24vdc
Catalog Number	1769-IQ16
Quantity on Hand	3 Add 1 Remove 1
Asset Tags	CP01

The details of the part are displayed. The 'Quantity on Hand' can be increased by pressing on the 'Add 1' button. Pressing on 'Add 1' button increases the quantity by 1 (each click will increase quantity by one). Similarly the 'Quantity on Hand' can be decreased by pressing on the 'Remove 1' button which will reduce quantity by one.

Pressing on 'Back to Part' button takes the user back to parts list

19.4.2.2 Edit

This action allows user to edit the selected part. Clicking on this option for a part brings up the Edit Part screen

After making the required updates, the user can press on the 'Save Part' button which will save the changes

Pressing on the 'Back to Part' button will take the user back to the parts list

19.4.2.3 Delete

Clicking on Delete will delete the part after confirmation from the user

19.4.3 Add New Part

Pressing on the 'Add New Part' button will bring up the screen to add a new part as shown below

New Part

Vendor

Please Select a Vendor

Name

Description

Catalog Number

Quantity on Hand

Minimum (Min) Quantity

Maximum (Max) Quantity

Asset Tags

Click here to search

Location

Create New Part

The following fields can be added for a part

- Vendor: The vendor supplying the part
- Name: The name of the part. This is a required field
- Description: The description of the part
- Catalog number: The catalog number of the part. This is a required field
- Quantity On Hand: The quantity of part available. This is a required field
- Min Quantity: The minimum quantity of part required
- Max Quantity: The maximum quantity of part required
- Asset Tag: The asset tag of the part
- Location: The location of the part

After filling in all the fields and pressing on the 'Create New Part, the new part will created in the system and user will be taken back to part list

Pressing on 'Back to Part button will take user back to part list without saving the changes

19.5 Vendor

CMMS > Vendor

19.5.1 Vendors List

The landing page will show the list of vendors in the system

Vendors [Add New Vendor](#)

Vendors

Show 10 entries Search:

Name	Contact Name	Contact Email	Phone	Actions
Pendant Automation, Inc	Brad Hoffman	bhoffman@pendantautomation.com	4438070381	View Edit Delete

Showing 1 to 1 of 1 entries

[Export data to CSV](#) [Export data to Excel](#)

The fields shown for each vendor in the list are

- Name: The name of the vendor
- Contact Name: The contact name of the vendor
- Contact Email: The contact email of the vendor
- Phone: The phone number of the vendor
- Actions: The Actions that can be taken on the vendor which are 'View', 'Edit', and 'Delete'. These are explained in more detail in following sections

The number of vendors to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for vendors based on keyword specified in the search box

The vendors list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of vendors currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.5.2 Actions

19.5.2.1 View

This action allows user to view the selected vendor. Clicking on this option for a vendor brings up the View Vendor screen

View Vendor

Back to Vendor

View Vendor

Name	Pendant Automation, Inc
Address 1	516 Young St.
Address 2	
City	Havre de Grace
State	MD
Country	US
Zip Code	21078
Phone 1	4438070381
Phone 2	
Fax	
Url	
Contact Name	Brad Hoffman
Contact Email	bhoffman@pendantautomation.com
Comments	
Payment Terms	Net 30
Shipping Terms	PPA
Ship Via	UPS/FedEx

The details of the vendor are displayed

Pressing on 'Back to Vendor' button takes the user back to vendors list

19.5.2.2 Edit

This action allows user to edit the selected vendor. Clicking on this option for a vendor brings up the Edit Vendor screen

Edit Vendor

Name

Pendant Automation, Inc

Address 1

516 Young St.

Address 2

City

Havre de Grace

State

MD

Country

US

Zip Code

21078

Phone 1

4438070381

Phone 2

Fax

Url

Contact Name

Brad Hoffman

Contact Email

bhoffman@pendantautomation.com

Comments

Payment Terms

Net 30

Shipping Terms

PPA

Ship Via

UPS/FedEx

Save Vendor

After making the required updates, the user can press on the 'Save Vendor' button which will save the changes

Pressing on the 'Back to Vendor' button will take the user back to the vendors list

19.5.2.3 Delete

Clicking on Delete will delete the vendor after confirmation from the user

19.5.3 Add New Vendor

Pressing on the 'Add New Vendor' button will bring up the screen to add a new vendor as shown below

New Vendor

Name

Address 1

Address 2

City

State

Country

Zip Code

Phone 1

Phone 2

Fax

Url

Contact Name

Contact Email

Comments

Payment Terms

Shipping Terms

Ship Via

Create New Vendor

The following fields can be added for a vendor

- Name: The name of the vendor. This is a required field
- Address1: The Address1 of the vendor

-
- Address2: The Address2 of the vendor
 - City: The city of the vendor. This is a required field
 - State: The state where the vendor is located
 - Country: The country where the vendor is located
 - Zip Code: The zip code of the vendor
 - Phone1: The Phone1 of the vendor
 - Phone2: The Phone2 of the vendor
 - Fax: The fax number of the vendor
 - Url: The Url to the website of the vendor
 - Contact Name: The contact name of the vendor
 - Contact Email: The contact email of the vendor
 - Comments: The comments for vendor can be added here
 - Payment Terms: The payment terms of the vendor
 - Shipping Terms: The shipping terms of the vendor
 - Ship via: The company/agency via which the shipping is to be done

After filling in all the fields and pressing on the 'Create New Vendor', the new vendor will be created in the system and user will be taken back to vendors list

Pressing on 'Back to Vendor' button will take user back to vendors list without saving the changes

19.6 Data Sheets

CMMS > Data Sheets

19.6.1 Data Sheets List

The landing page will show the list of data sheets in the system

Data Sheet [Add New Data Sheet](#)

Data Sheet

Show 10 entries Search:

Title	Assets	Actions
CB Siemens UL 489		View Edit/Replace Delete Download
1579128545		View Edit/Replace Delete Download

Showing 1 to 2 of 2 entries

< Previous 1 Next >

[Export data to CSV](#) [Export data to Excel](#)

The fields shown for each data sheet in the list are

- Title: The title of the data sheet
- Assets: The assets associated with the data sheet
- Actions: The Actions that can be taken on the data sheet which are 'View', 'Edit/Replace', 'Delete' and 'Download'. These are explained in more detail in following sections

The number of data sheets to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

There is a search box at the top right of the list which allows to search for data sheets based on keyword specified in the search box

The data sheets list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

The list of data sheets currently in the system can be exported in CSV format or to Excel by pressing the 'Export data to CSV' and 'Export data to Excel' respectively

19.6.2 Actions

19.6.2.1 View

This action allows user to view the selected datasheet. Clicking on this option for a data sheet brings up the View Data Sheet screen

There are two sections

19.6.2.1.1 View Data Sheet section

This section show data related to data sheet

The Title, Assignee, File uploaded and Created date time stamp are shown. Pressing on the 'Map Asset' button brings up the 'Asset Mapping with Data Sheet' screen as shown below

After choosing from list of available assets, and pressing of 'Map Asset' button, the selected assets will get mapped to the data sheet and then appear in the 'Asset For This Data Sheet' section. Pressing on 'Close' will close the screen without saving

19.6.2.1.2 Asset for This Data Sheet section

This section shows the assets mapped to the data sheet as shown below

Asset For This Data Sheet							
Show 10 entries		Search: <input type="text"/>					
Unit Tag	Parent	Type	Use	Model Number	Serial Number	In Service Date	In Service
CP01		Control Panel	Controlling Things			2021-04-01	0y 2m
Showing 1 to 1 of 1 entries						< Previous 1 Next >	

The following fields for assets are shown

- Unit Tag: The unit tag of the asset
- Parent: The parent of the asset
- Type: The type of the asset
- Use: The use of the asset
- Model Number: The model number of the asset
- Serial Number: The serial number of the asset
- In Service Date: The date since when the asset is in service.
- In Service: This shows the duration for which the asset is in service in years and months

The number of entries to show in the list can be specified using the Show entries dropdown located at top left of the list. The default is 10. The number of entries currently being shown can be seen on the bottom left of the list. The user can move to next and previous entry in the list by pressing on the 'Next' and 'Previous' buttons respectively located at bottom right of the list

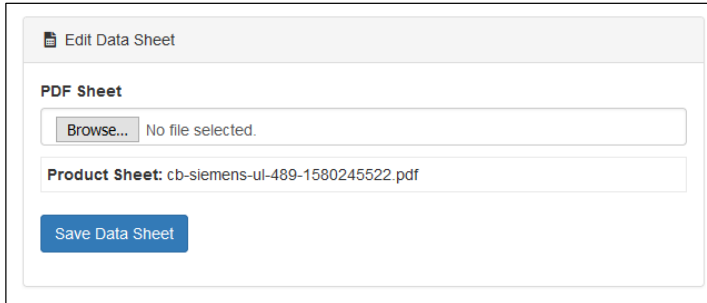
There is a search box at the top right of the list which allows to search for assets based on keyword specified in the search box

The assets list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

Pressing on the 'Back to Data Sheet' button will take the user back to the data sheets list

19.6.2.2 Edit/Replace

This action allows user to edit/replace the data sheet file as shown below



On pressing the 'Browse' button the 'File Upload' dialog box will be shown which will allow the user to select the required file (Note: File must be of type pdf only). After selecting the file and pressing on 'Save Data Sheet' button the new data sheet file will replace the old file and the new data sheet file will be saved and user will be taken back to the data sheets list

Pressing on the 'Back to Data Sheet' button will take the user back to the data sheets list

19.6.2.3 Delete

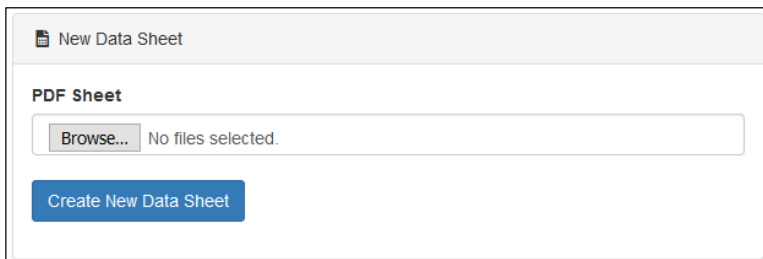
Clicking on the Delete will delete the data sheet from the system after confirmation from the user

19.6.2.4 Download

Clicking on the Download will allow the user to download the data sheet file

19.6.3 Add New Data Sheet

Pressing on the 'Add New Data Sheet' button will bring up the screen to add a new data sheet as shown below



On pressing the 'Browse' button the 'File Upload' dialog box will be shown which will allow the user to select the required file (Note: File must be of type pdf only). After selecting the file and pressing on 'Save Data Sheet' button the new data sheet file will be saved and user will be taken back to the data sheets list

Pressing on the 'Back to Data Sheet' button will take the user back to the data sheets list