WXS

Warehouse Control/Execution Software

User Manual

Version: 1.1

Date: June 17, 2021

Table of Contents

© Copy Right All rights reserved

© Copy Right All rights reserved

© Copy Right All rights reserved

© Copy Right All rights reserved

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

© Copy Right All rights reserved

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.

© Copy Right All rights reserved

4 Login to the application

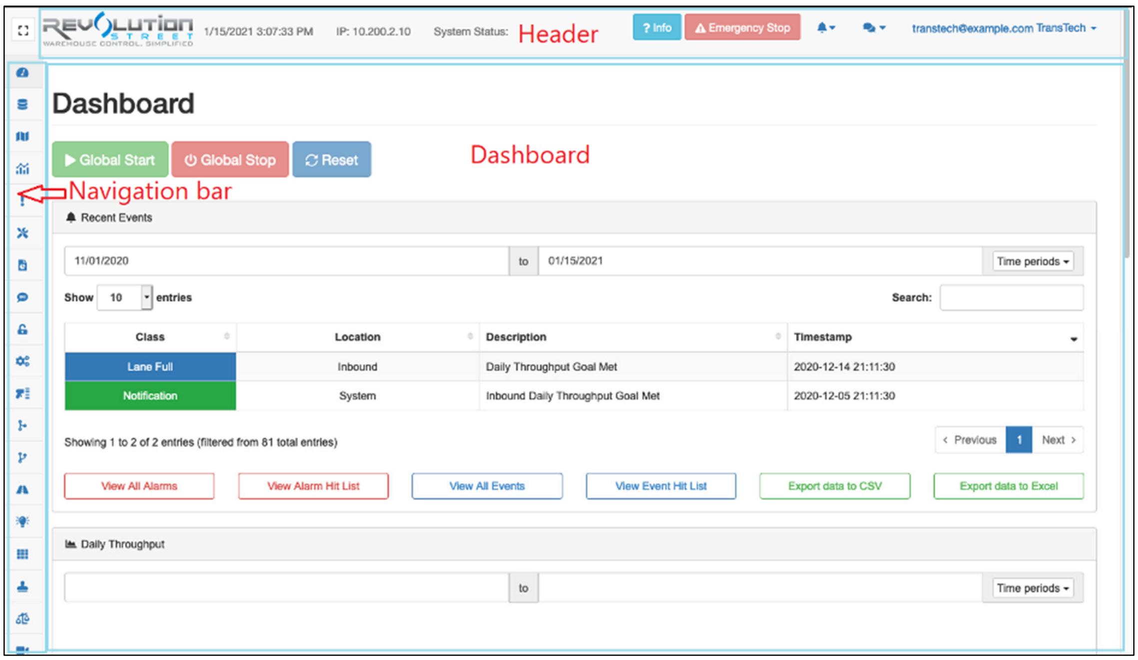
- Enter the E-Mail Address. This email address will be same one as the one you received from your System Admin during account creation.
- Enter the Password (your system Admin should provide you with the password)
- If you want the site to remember your login so that you do not have to enter your credentials 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

© Copy Right All rights reserved

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.

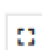


5.1 Home Page

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

5.2 Header

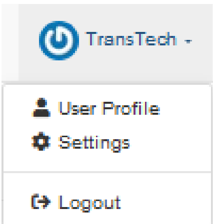
This shows the follows

- 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

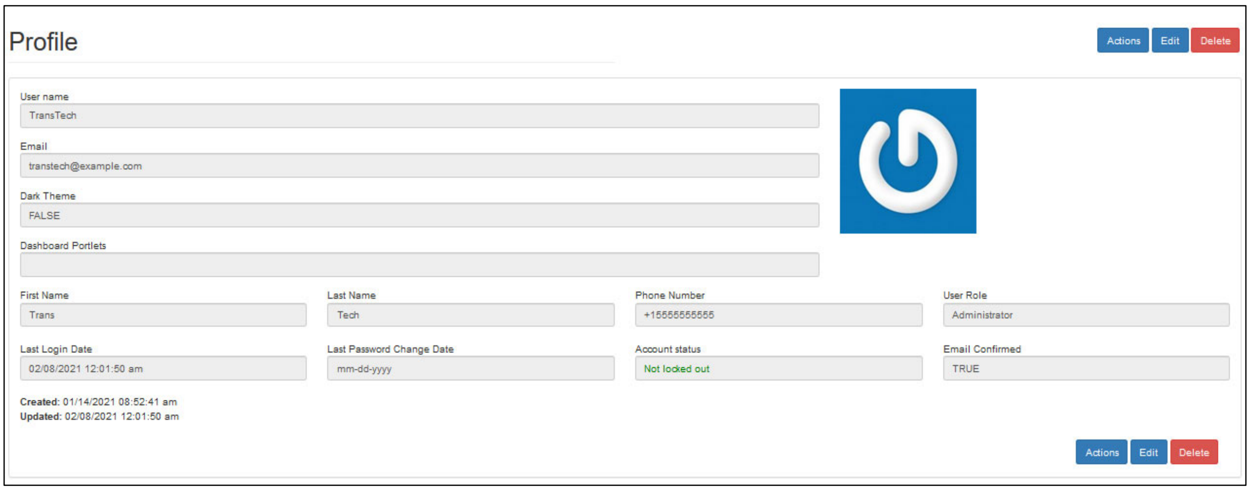
© Copy Right All rights reserved

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



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

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

© Copy Right All rights reserved

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.

© Copy Right All rights reserved

6 Dashboard

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

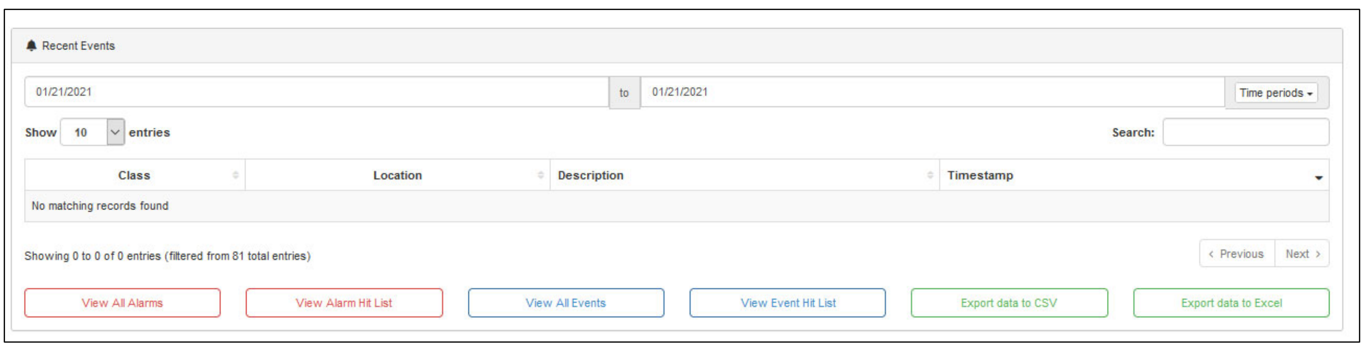
6.1 Dashboard Header (Global System Control)

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

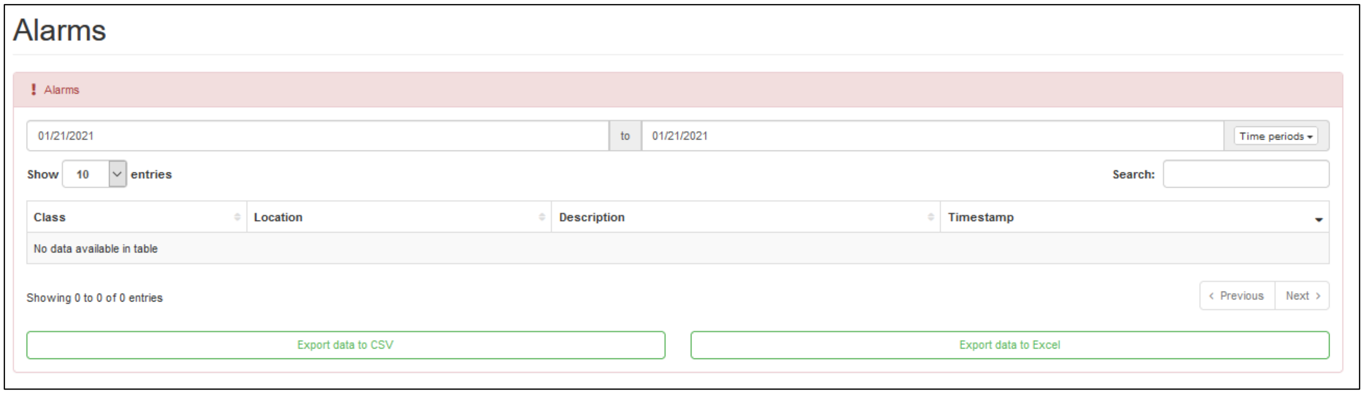
© Copy Right All rights reserved

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



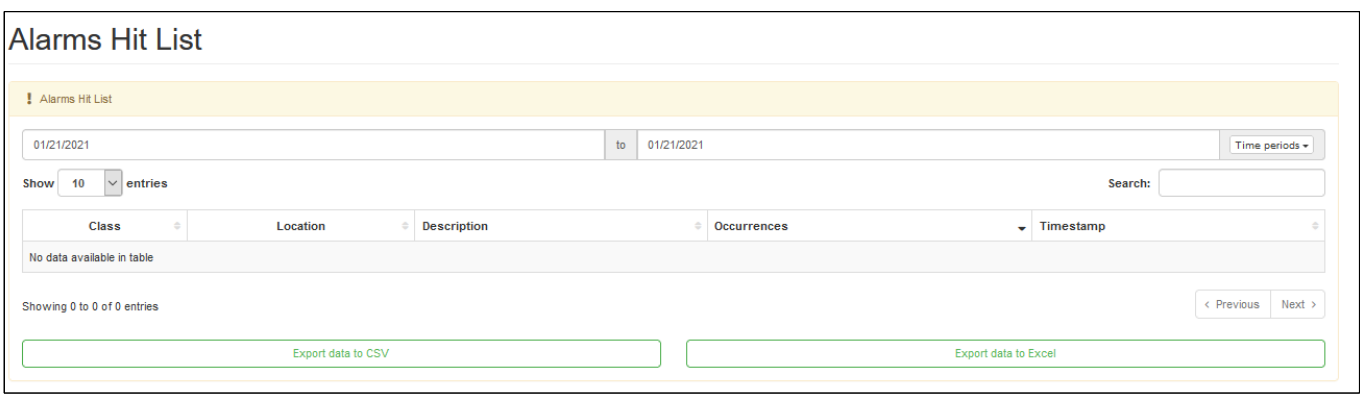
This shows the list of events filtered for type where the event is of type Alarm i.e. a list of alarms

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



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.

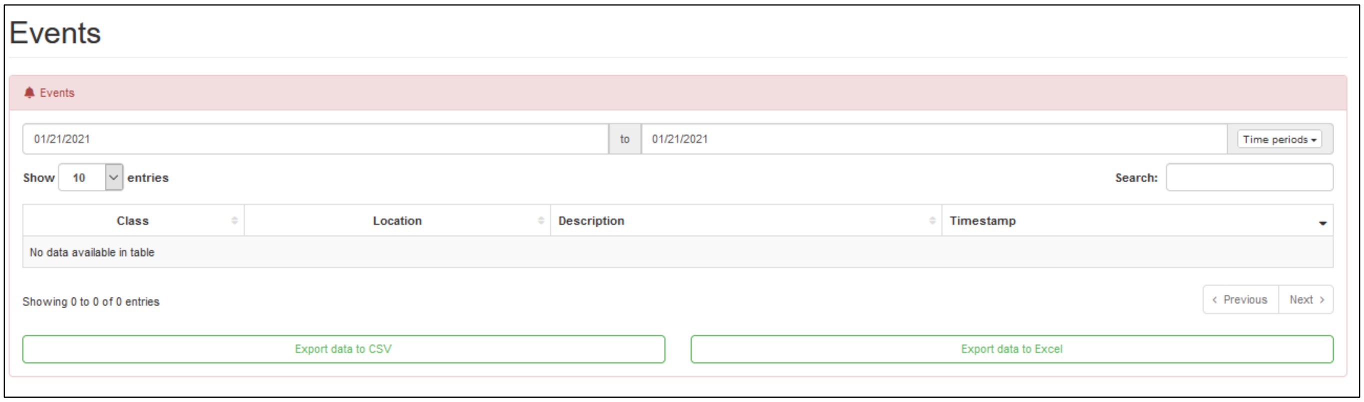
The fields shown in list of hit alarms is same as that in recent event list. Also the same filtering of data, paging, sorting and search is present as on the recent event list

© Copy Right All rights reserved

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



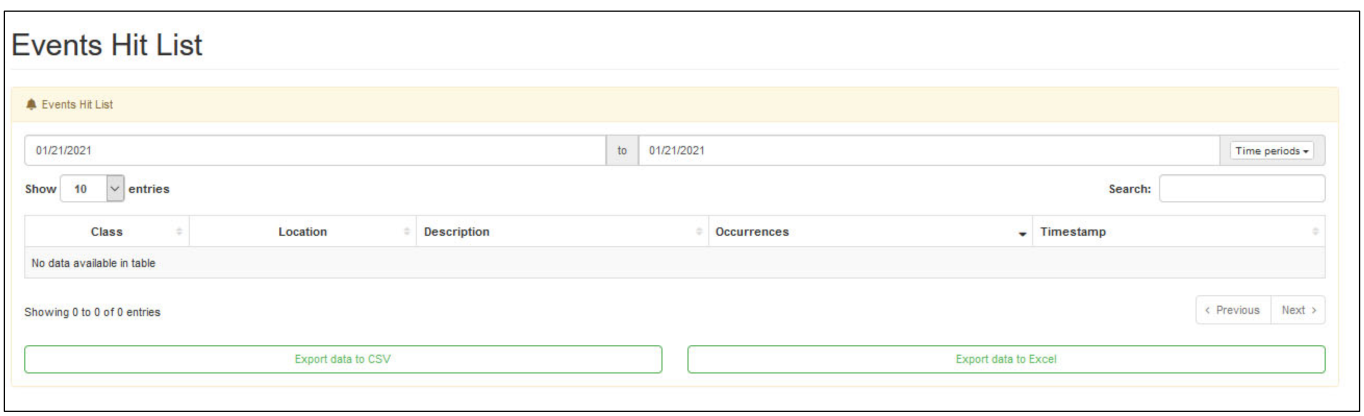
This shows the list of events filtered for type where the event is of type Event i.e. a list of Events

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.

© Copy Right All rights reserved

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

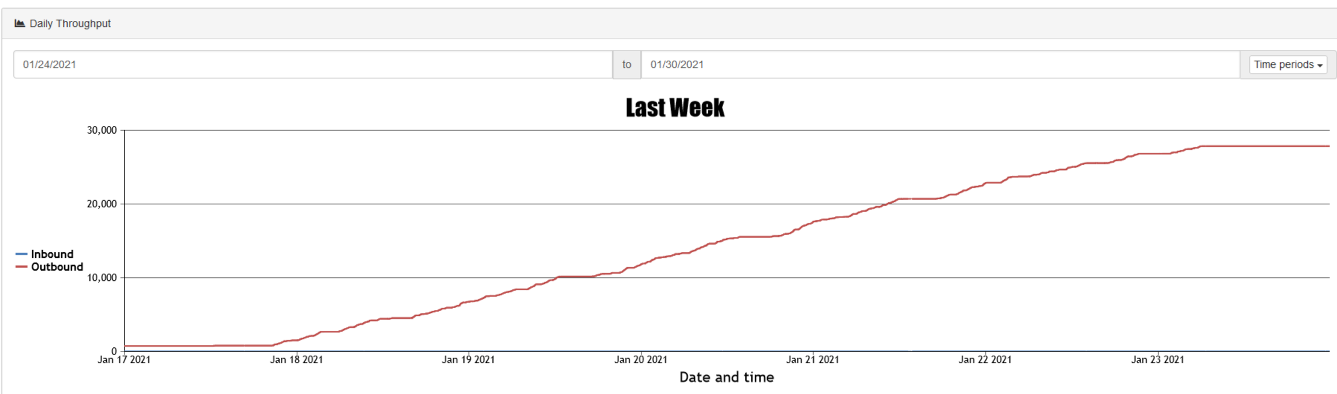
Clicking on this button will export all the recent events data to CSV file

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

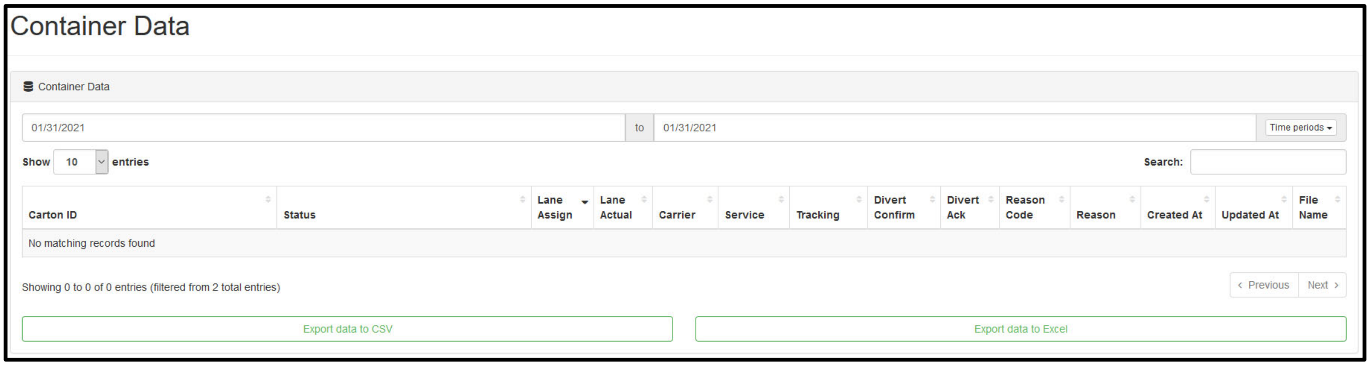
© Copy Right All rights reserved

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

© Copy Right All rights reserved

7 Container Data

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



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

© Copy Right All rights reserved

  - 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

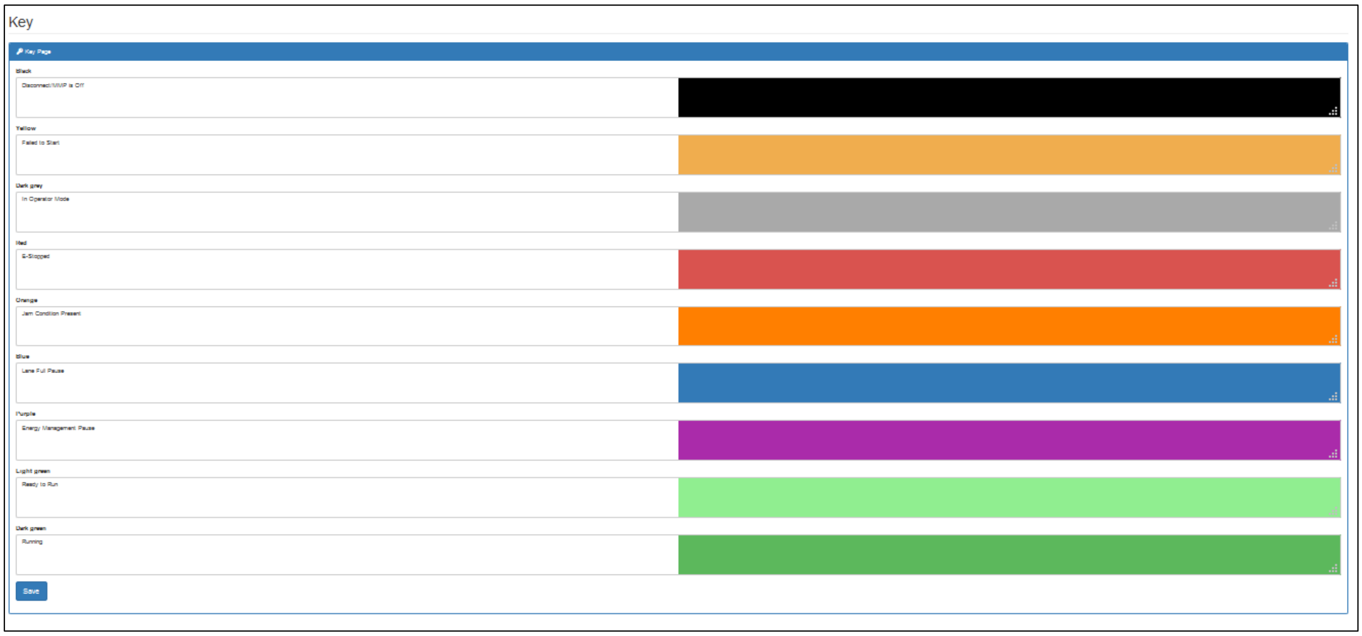
© Copy Right All rights reserved

8 System Details

8.1 Key

System Details > Key

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



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

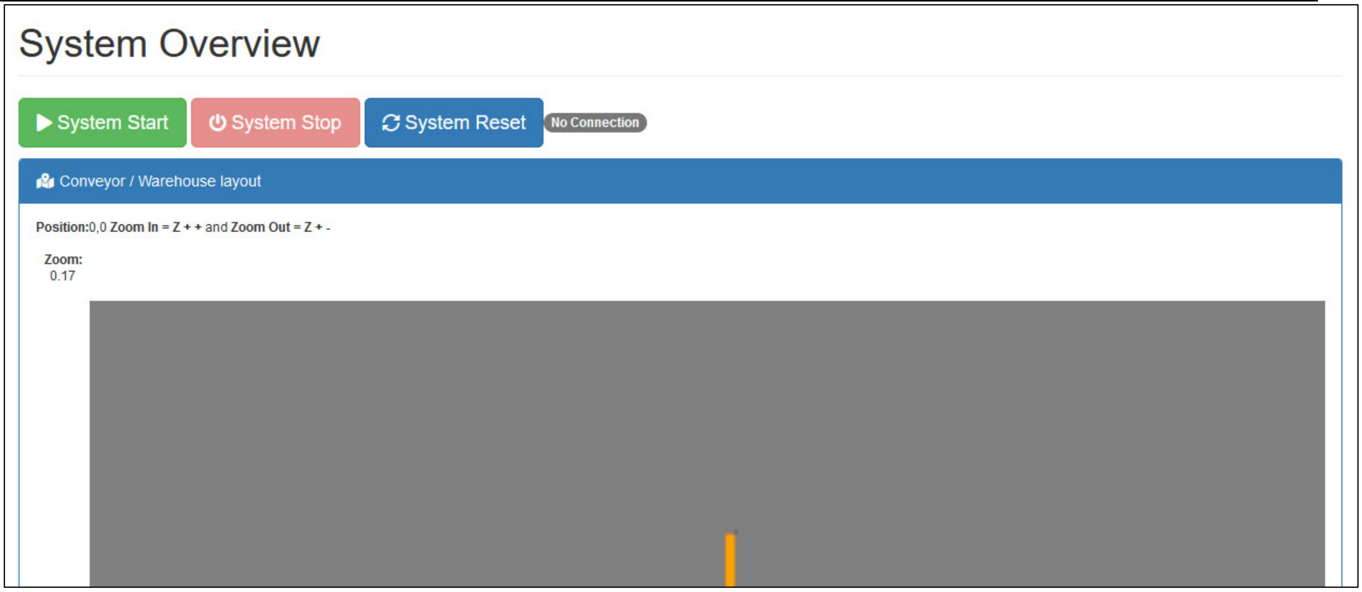
Note, this is set by Pendant Automation during commissioning

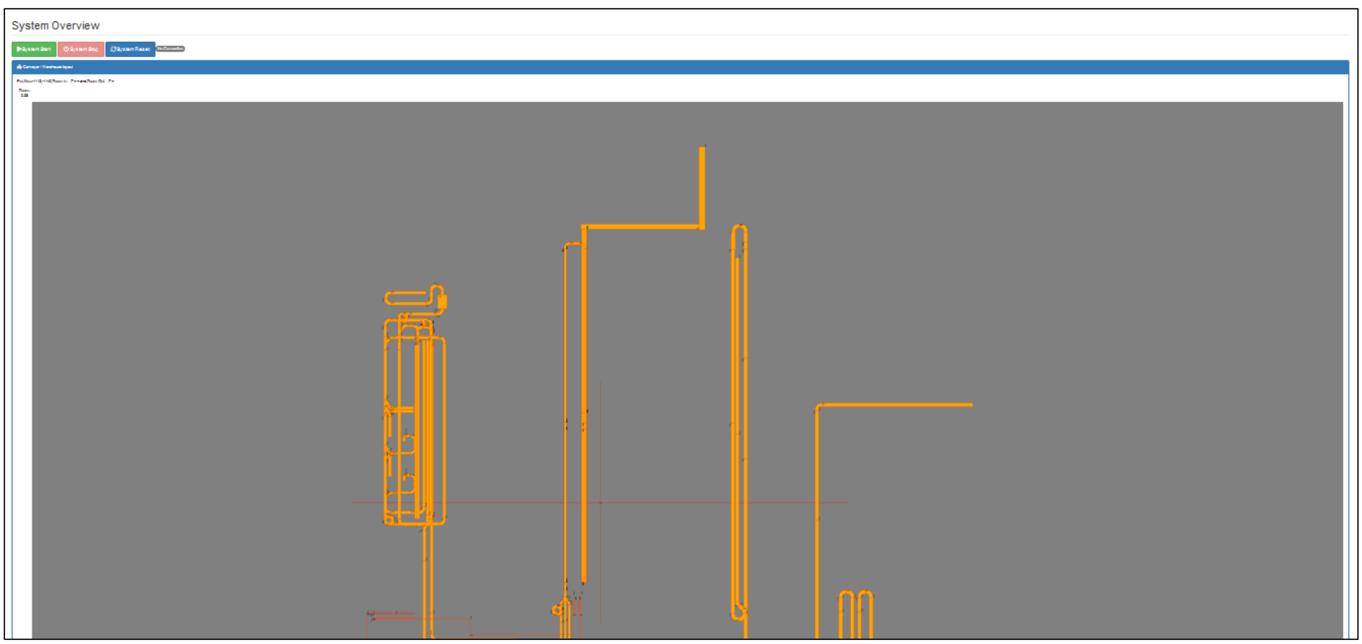
8.2 System Overview

System Details > System Overview

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

© Copy Right All rights reserved





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"

© Copy Right All rights reserved

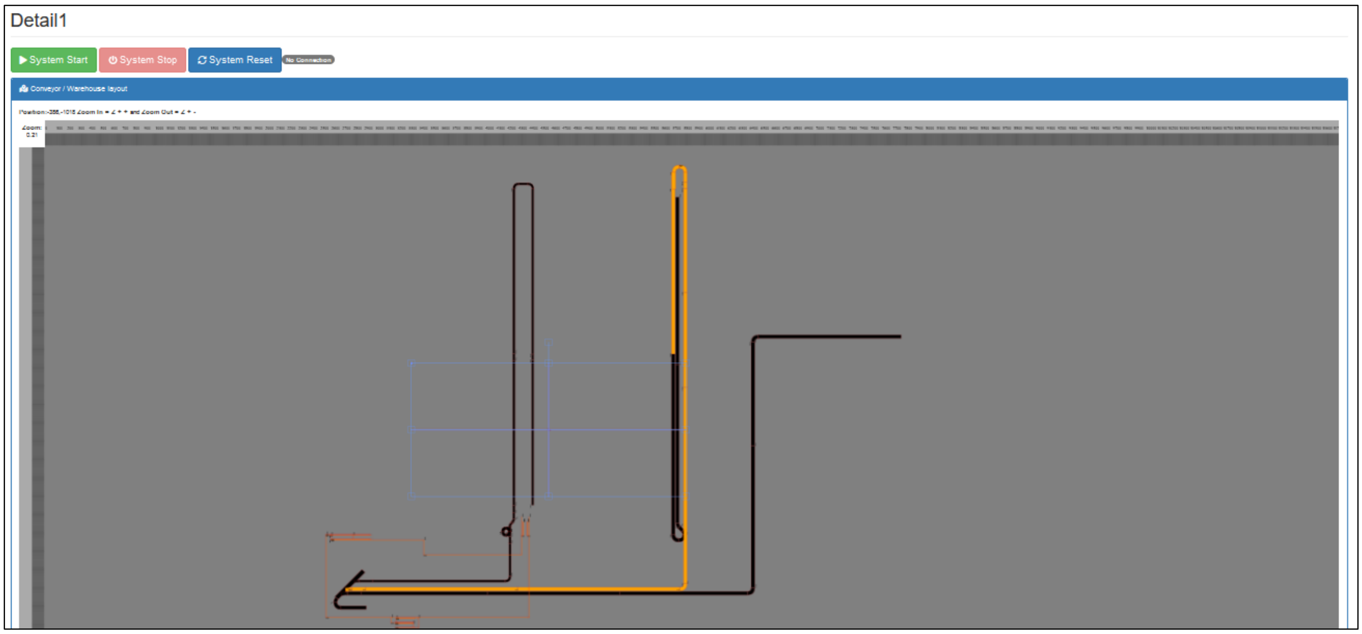
8.3 Conveyor/Warehouse Layout

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)

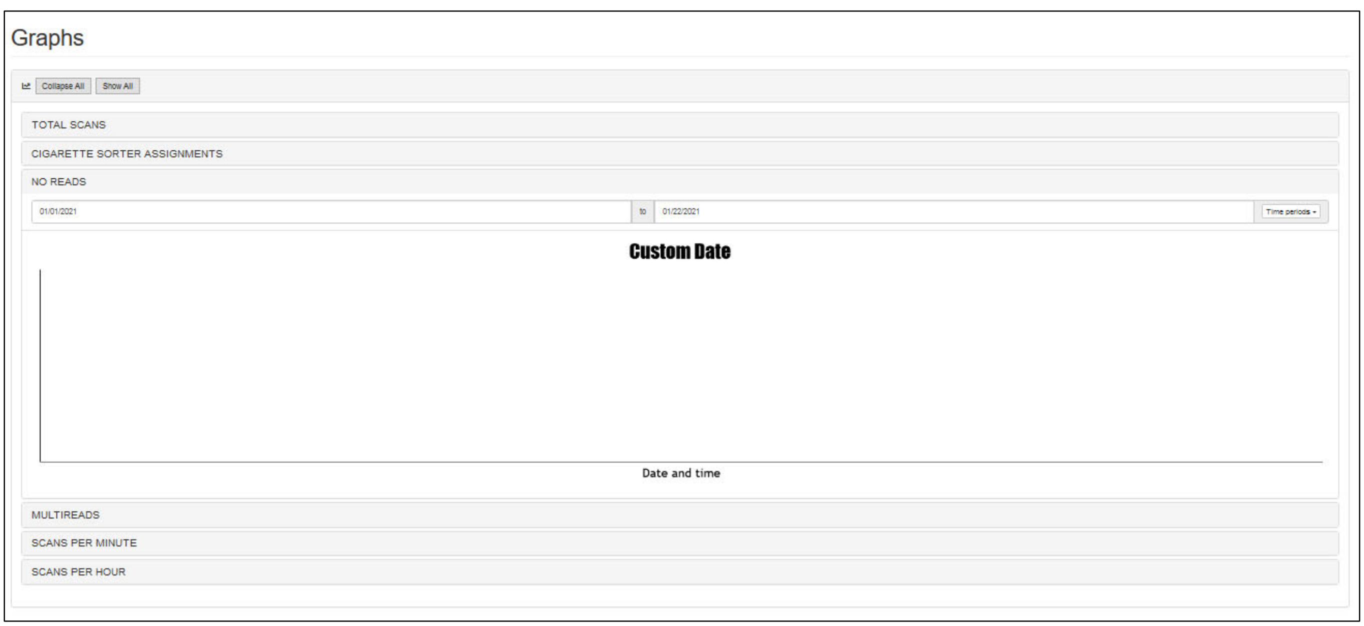
© Copy Right All rights reserved

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)



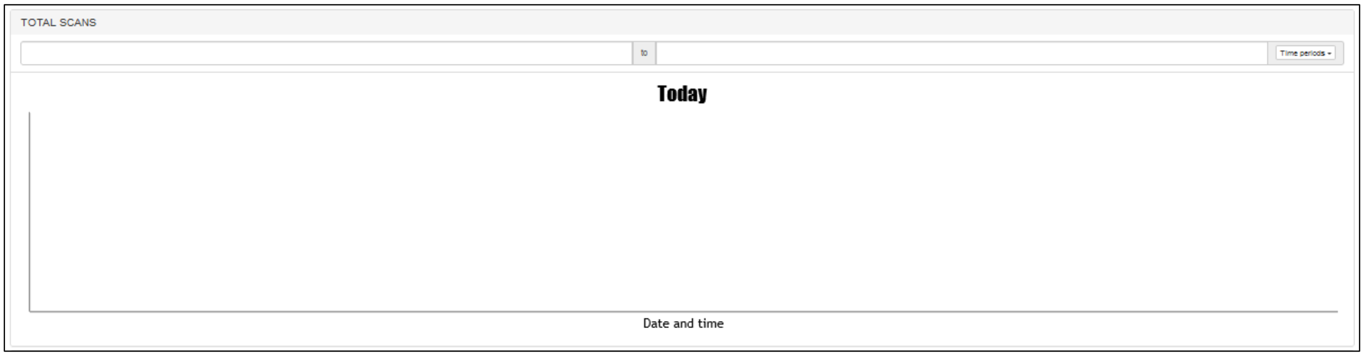
Similarly clicking on a graph header toggles the graph between show and collapsed state

© Copy Right All rights reserved

The following graphs are available

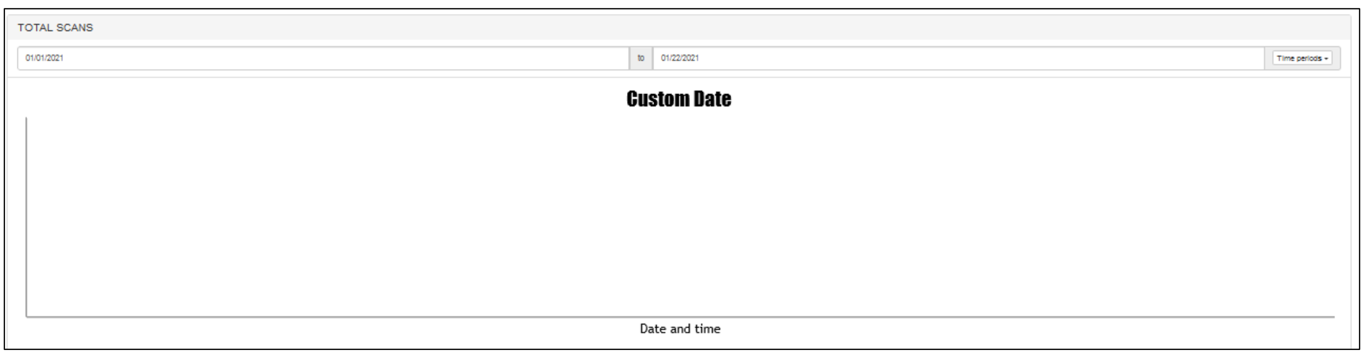
9.1 TOTAL SCANS

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

© Copy Right All rights reserved

9.3 NO READS

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

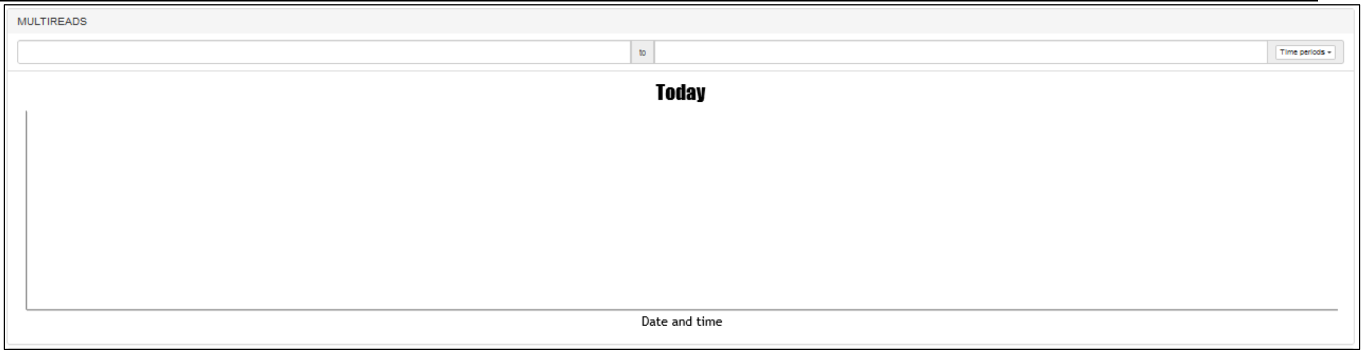
The ‘No reads’ are shown on Y axis and the date and time is shown on X axis

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

© Copy Right All rights reserved



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

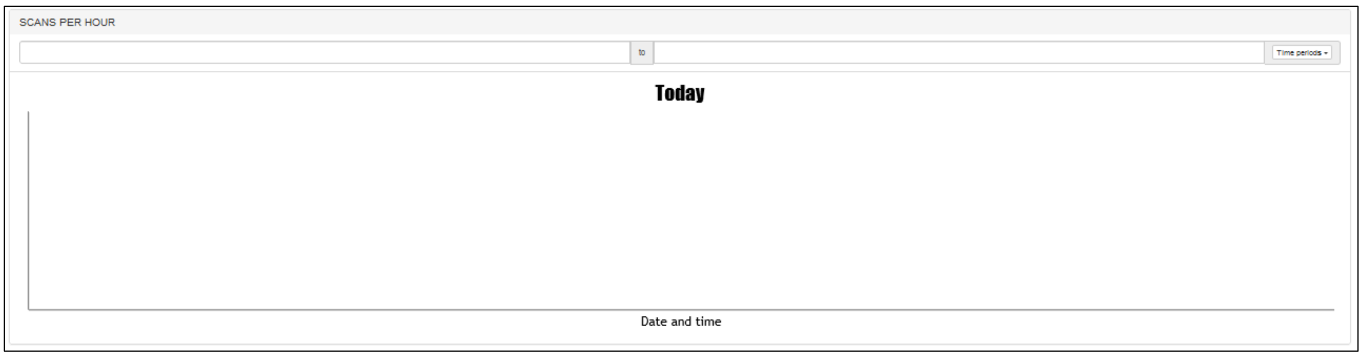
The scans per minute are shown on Y axis and the date and time is shown on X axis

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

© Copy Right All rights reserved

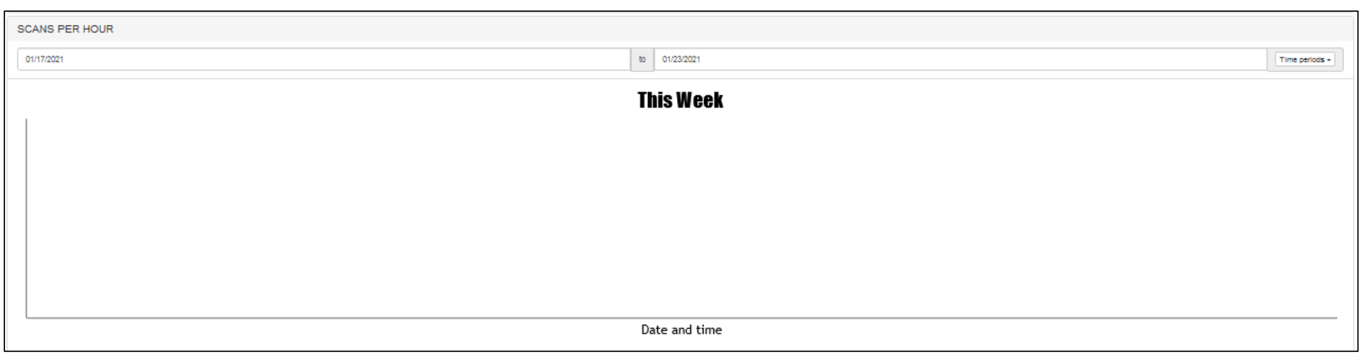
9.6 SCANS PER HOUR

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



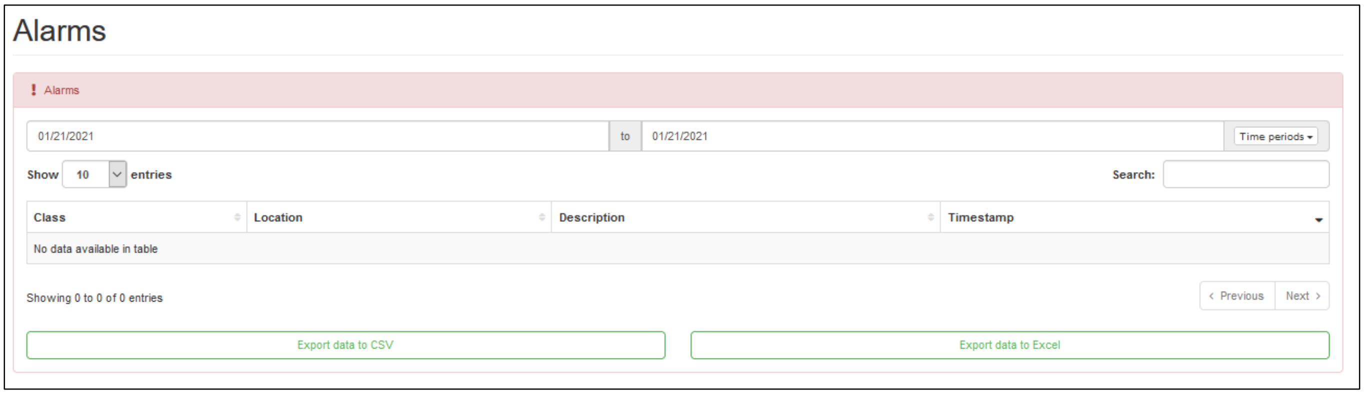
© Copy Right All rights reserved

10 Alarms & Events

10.1 Alarms

Alarms & Events > Alarms

This shows the list of Alarms in the system as below



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

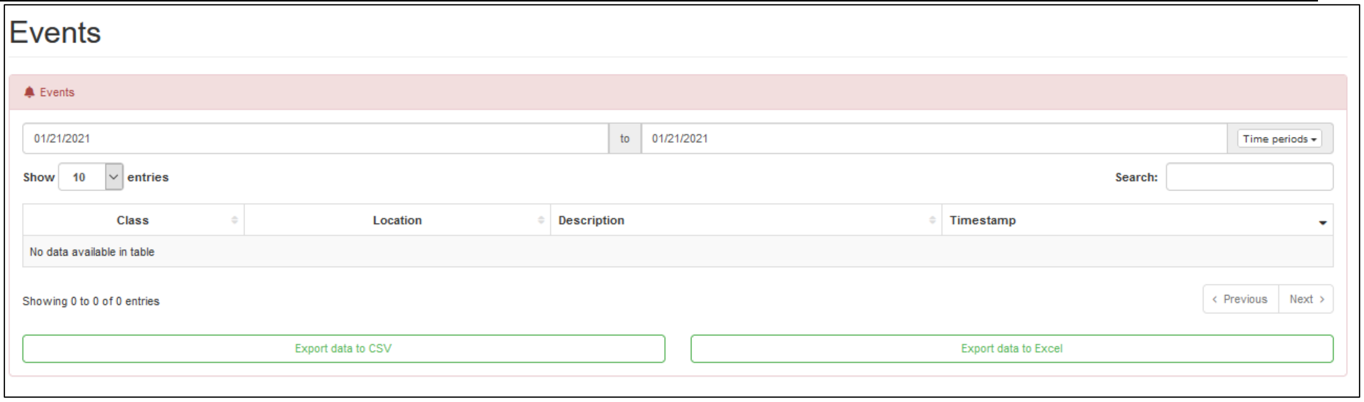
The user can also export the alarms to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.2 Events

Alarms & Events > Events

This shows the list of Events in the system as below

© Copy Right All rights reserved



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

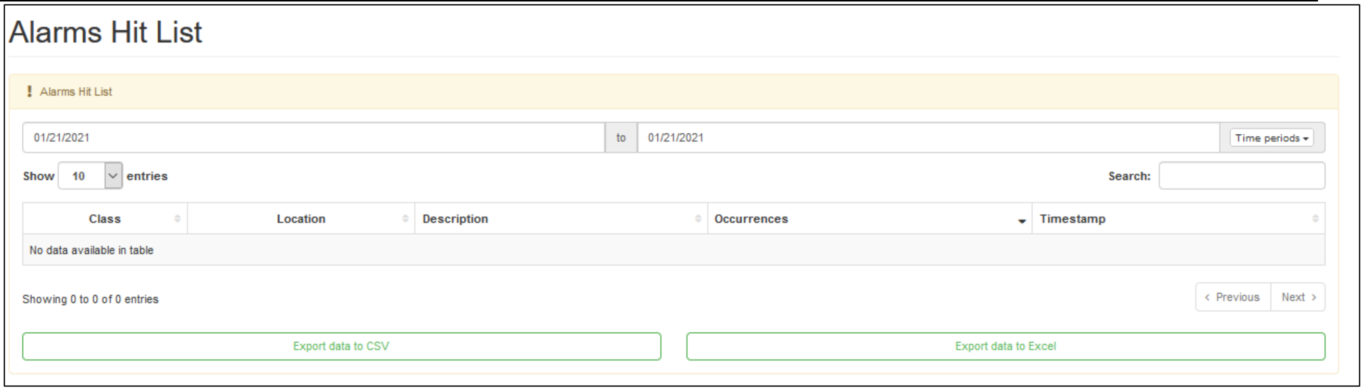
The user can also export the events to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.3 Alarms Hit List

Alarms & Events > Alarms Hit List

This shows the Alarms Hit List as below

© Copy Right All rights reserved



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

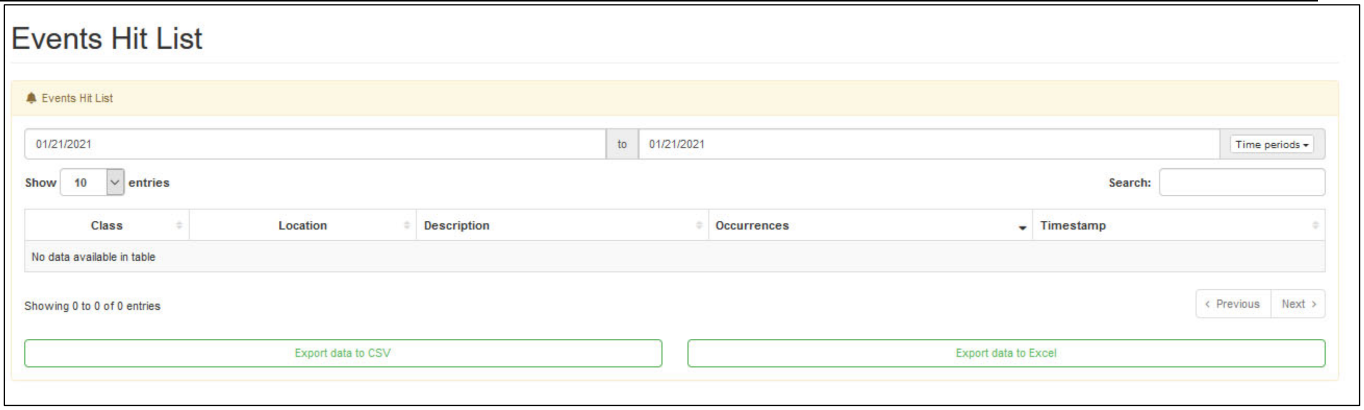
The user can also export the alarms hit data to CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

10.4 Events Hit List

Alarms & Events > Events Hit List

This shows the Events Hit List as below

© Copy Right All rights reserved



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

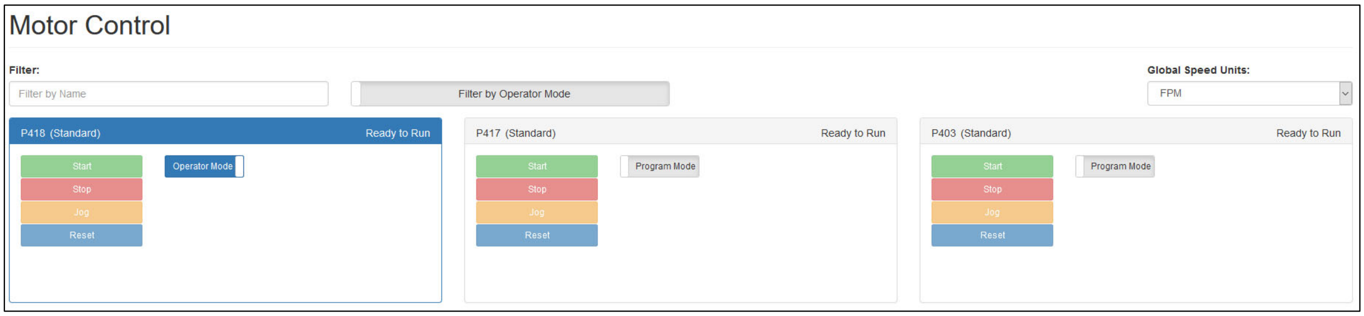
© Copy Right All rights reserved

11 Maintenance

11.1 Motor Control

Maintenance > Motor Control

This shows the list of motors for control as below

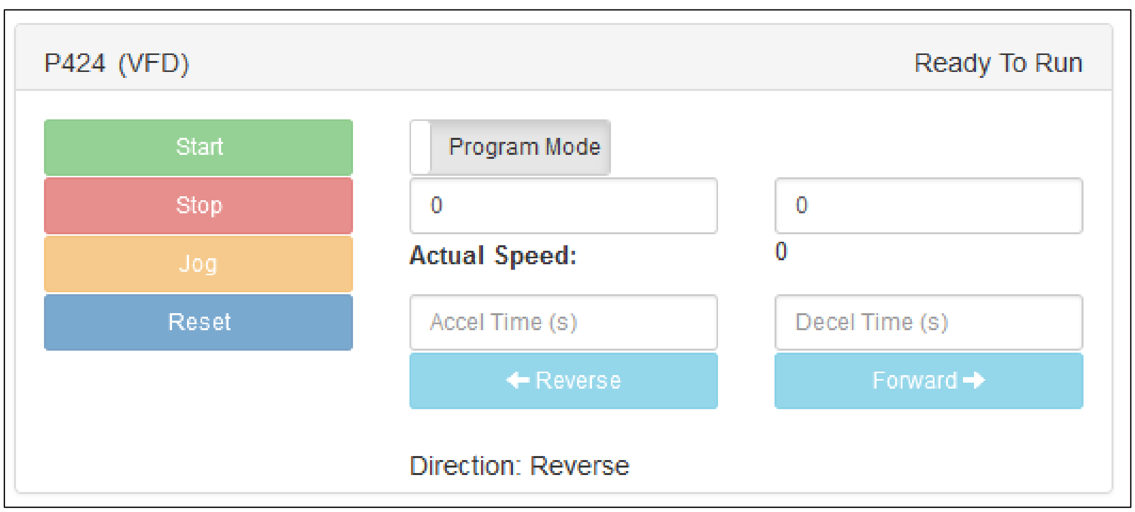


The list can be filtered by name of the motor or by toggling the 'Filter by Operator mode'

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 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

© Copy Right All rights reserved

- 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

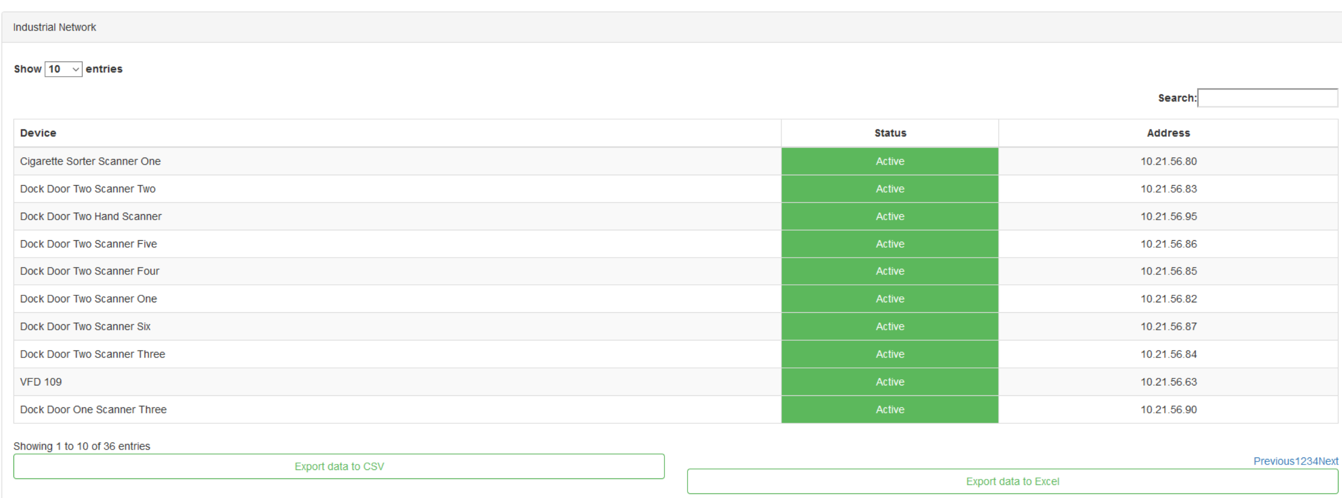
11.2 Network and I/O

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 10 entries

Search:

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

Previous1234Next

Export data to Excel

The following fields are shown for each device

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

© Copy Right All rights reserved

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

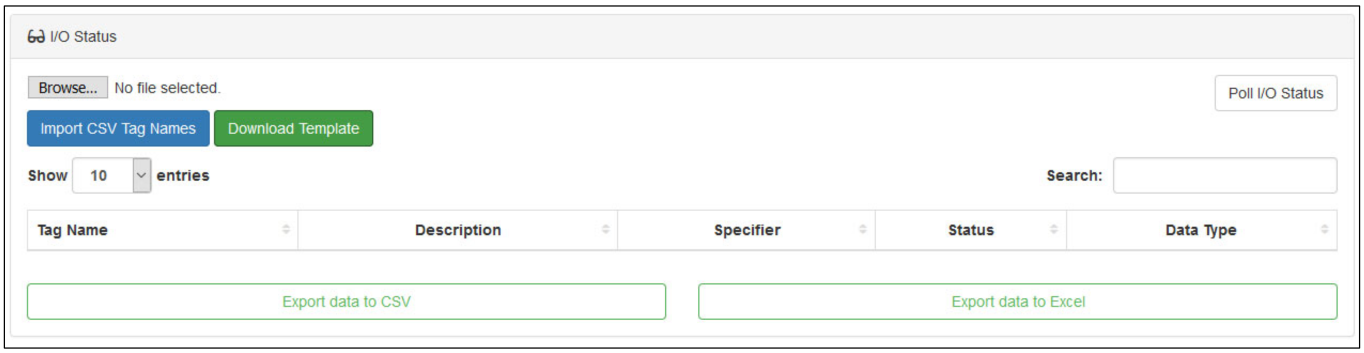
Clicking on a column header in the list toggles the sort order for the list between ascending and descending

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



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

© Copy Right All rights reserved

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

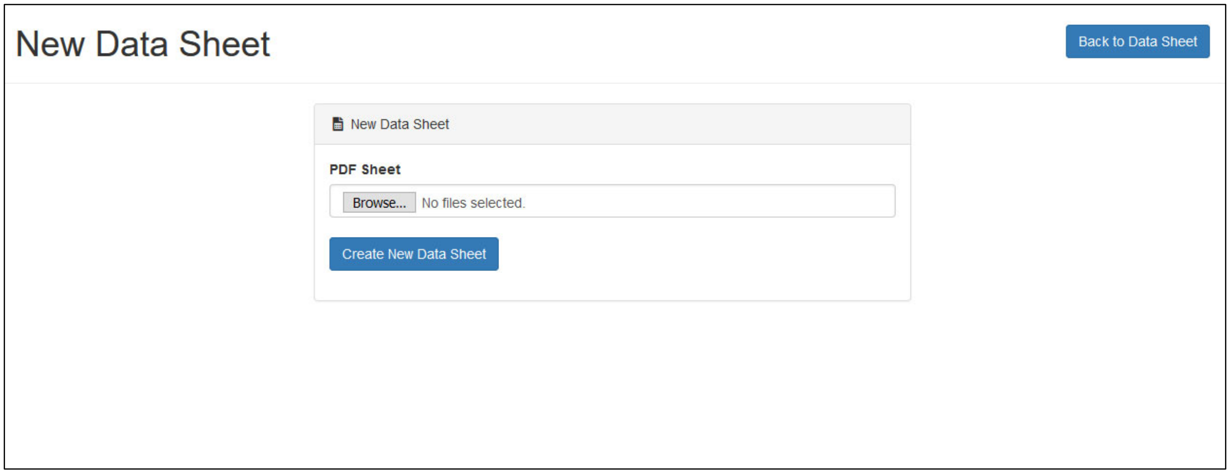
The following fields are shown for each data sheet

- 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’

© Copy Right All rights reserved

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



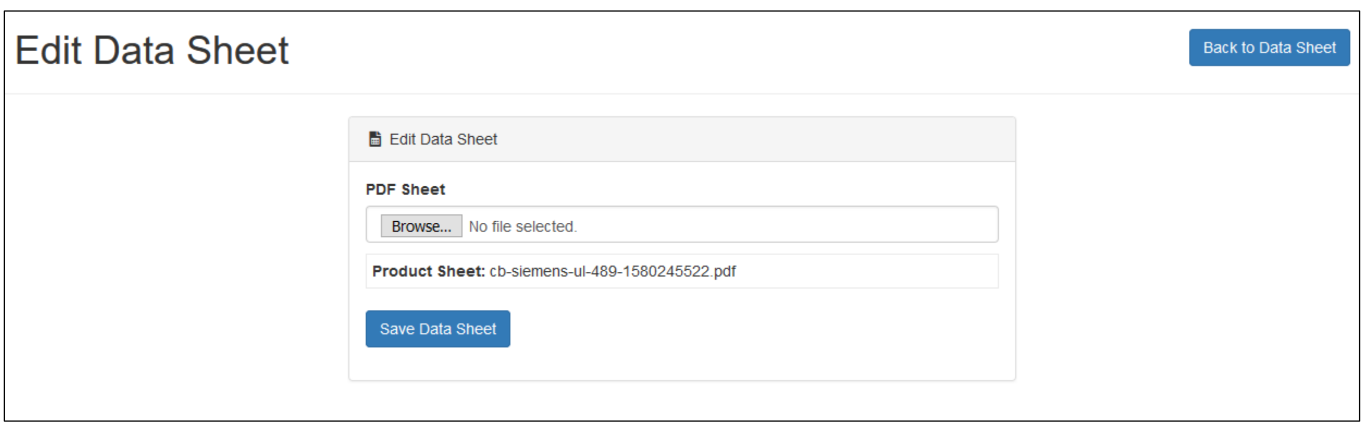
'Browse' the new datasheet to be uploaded (.pdf file). After selecting the new datasheet press on the 'Create New Data Sheet' button to add the new datasheet to the system.

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

© Copy Right All rights reserved

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.

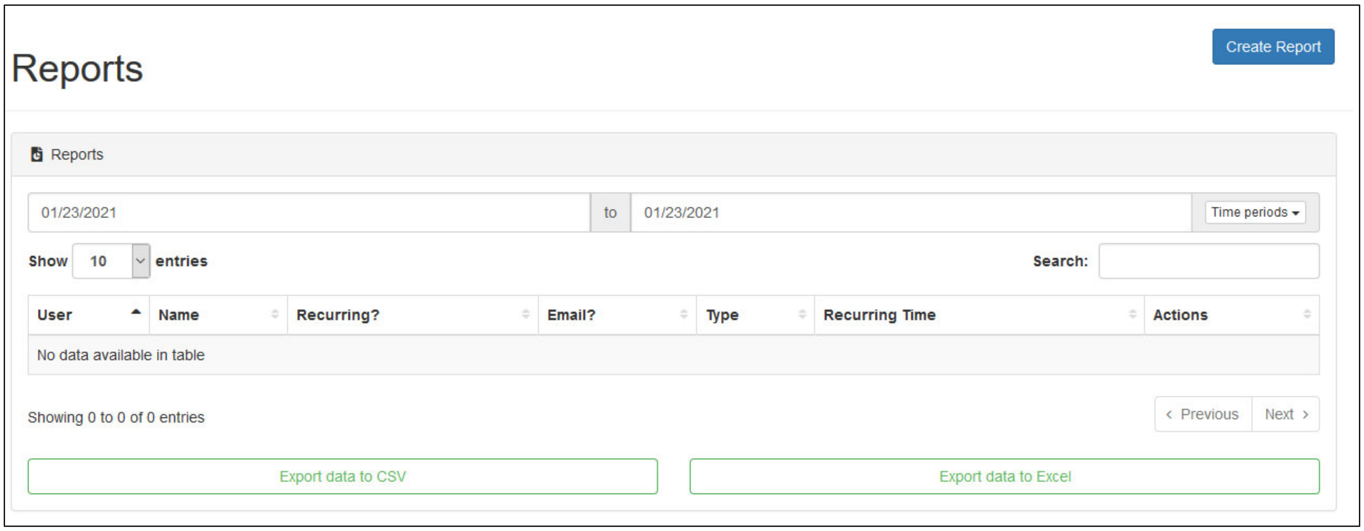
© Copy Right All rights reserved

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

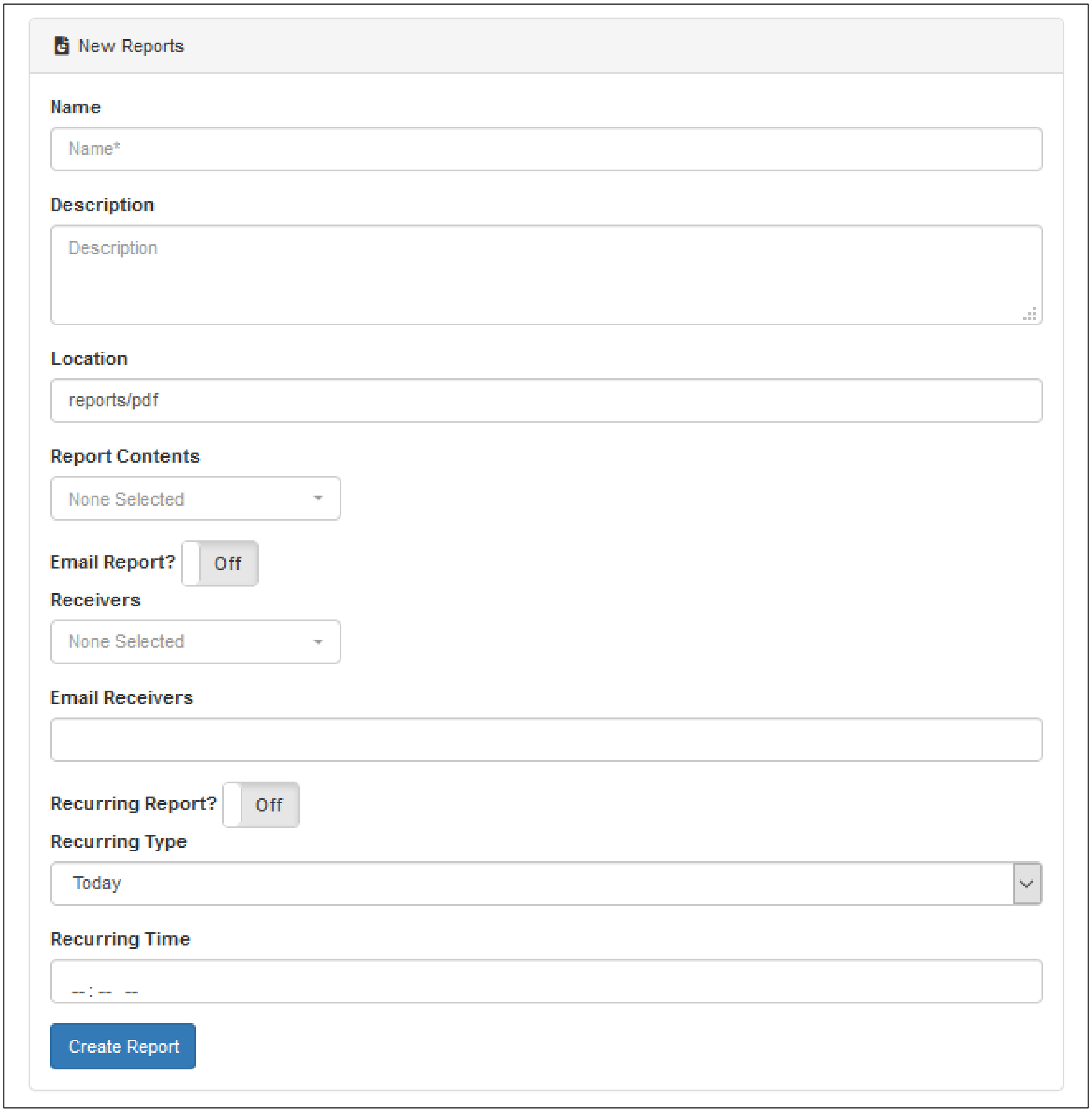
The user can search for reports using the ‘Search’ box located at the top right of the list

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

© Copy Right All rights reserved

12.1.1 Create Report

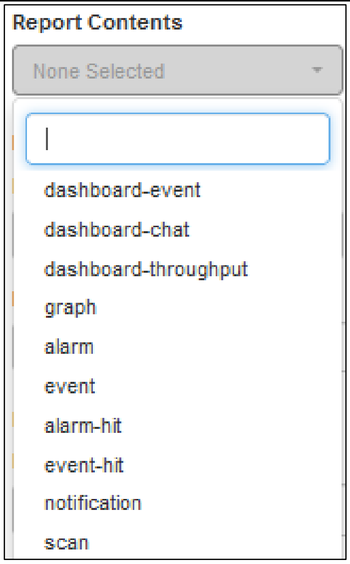
To create a report click on the 'Create Report' button which brings up the create screen



Fill in the fields to create a new report

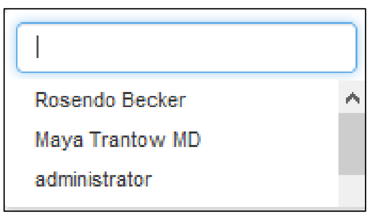
- Name: The name of the report. Please note this field is mandatory
- Description: The description of the report
- Location: The location of the report
- Report contents: The contents of the report. Please select an option from the dropdown as shown below

© Copy Right All rights reserved

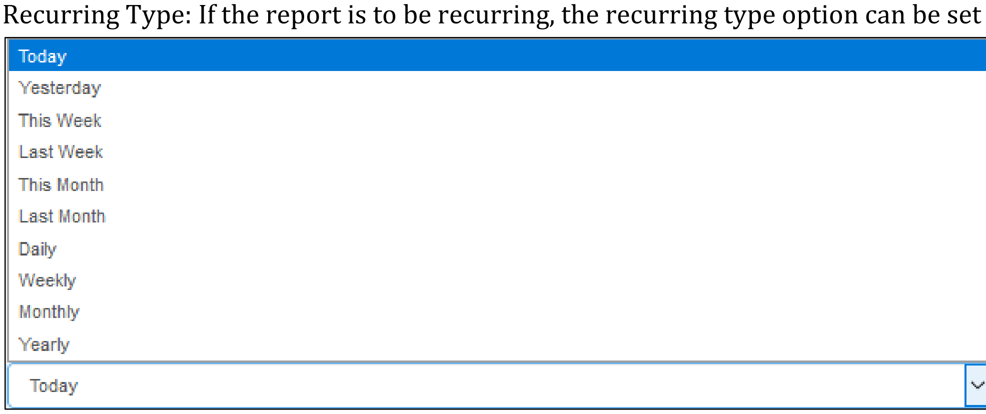


The user can search using the search box for a specific content for report or directly select from the list

- 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

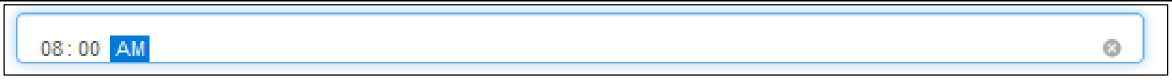


- Email receivers: If report is selected to be emailed, then here you can specify the list of emails of receivers. The list of emails can be specified with email addresses being separated by a comma. **Note:** This is for users who are not in the system, for users in the system they can be set to receive 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

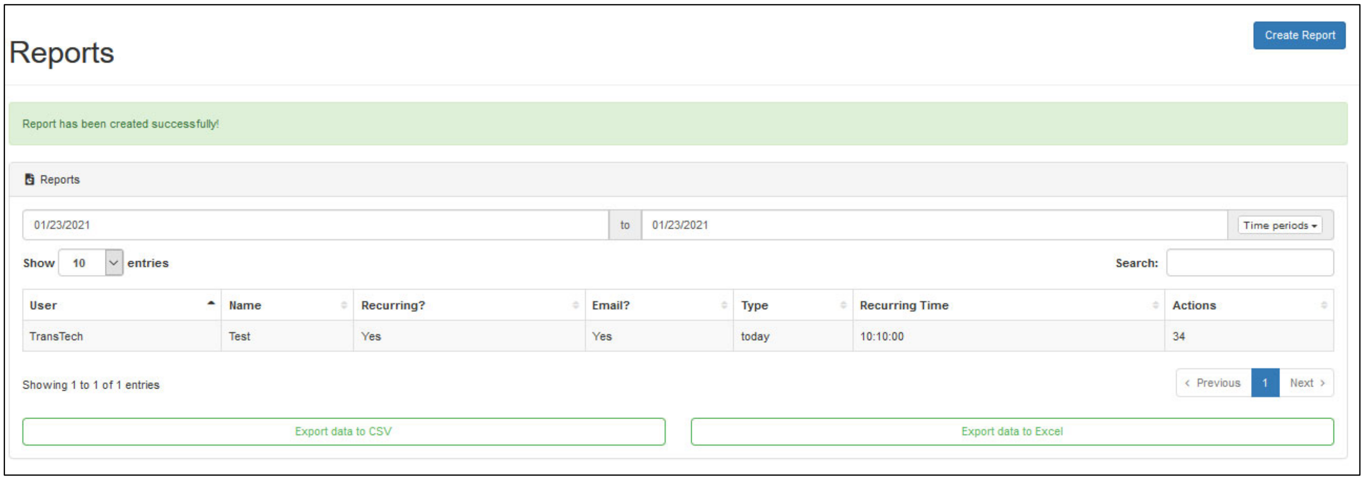


- Recurring Time: If the report is recurring specify the recurrence time in 'hh:mm AM/PM' format where 'hh' can have value from 0 to 12 and 'mm' can have value from 0 to 60

© Copy Right All rights reserved



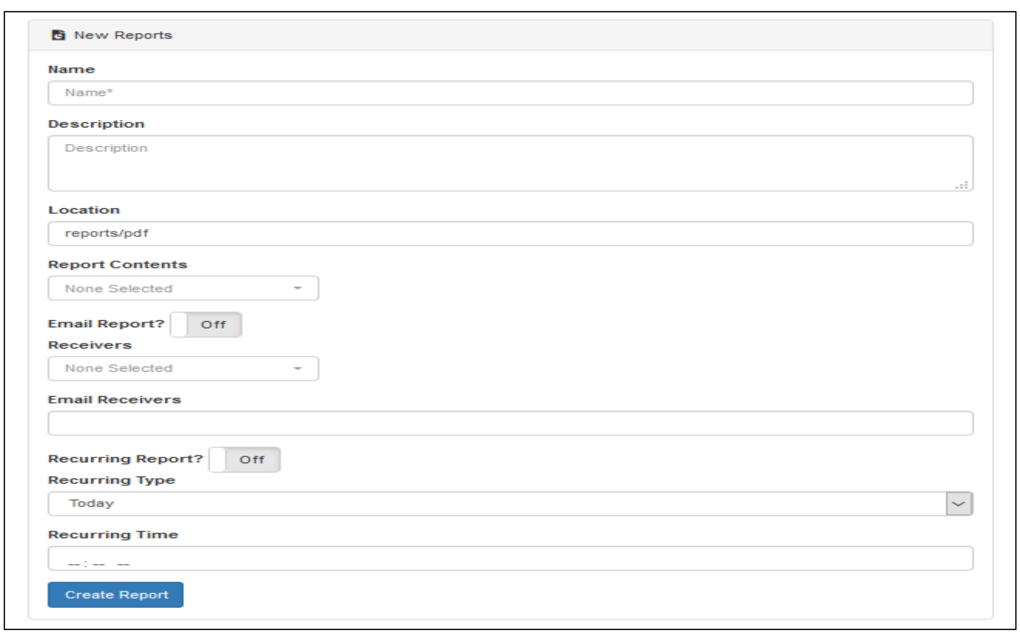
After filling in all the fields and clicking on 'Create Report' will save the report in the system. The report will now appear in the report list with a success message shown of successful addition of the new report



12.2 Create Report

<u>Reports</u> > <u>Create Report</u>

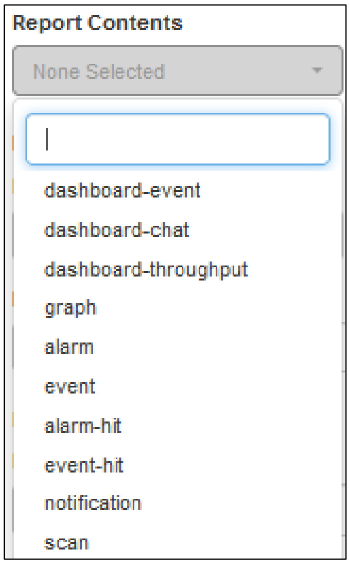
This will bring up create report as shown below



© Copy Right All rights reserved

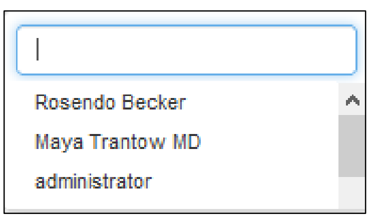
Fill in the fields to create a new report

- 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



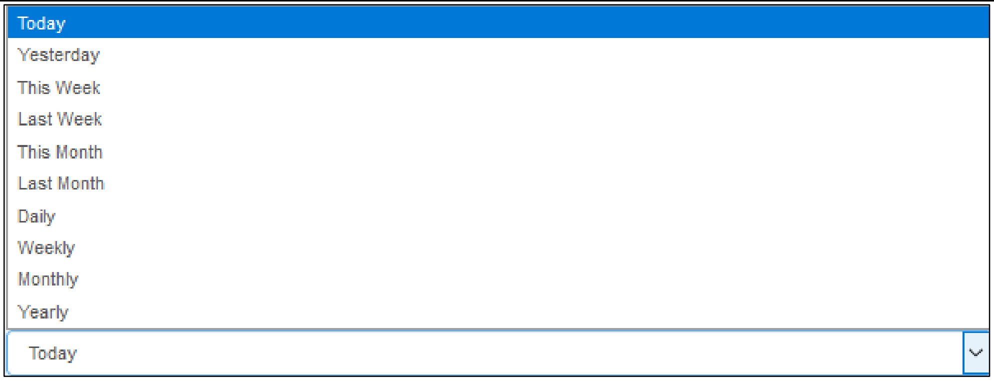
The user can search using the search box for a specific content for report or directly select from the list

- 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

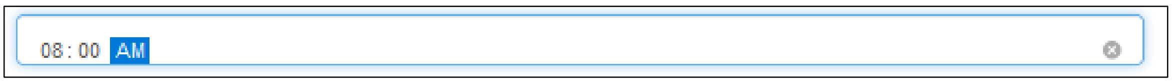


- Email receivers: If report is selected to be emailed, then here you can specify the list of emails of receivers. The list of emails can be specified with email addresses being separated by a comma. **Note:** This is for users who are not in the system, for users in the system they can be set to receive 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

© Copy Right All rights reserved



- 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



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.

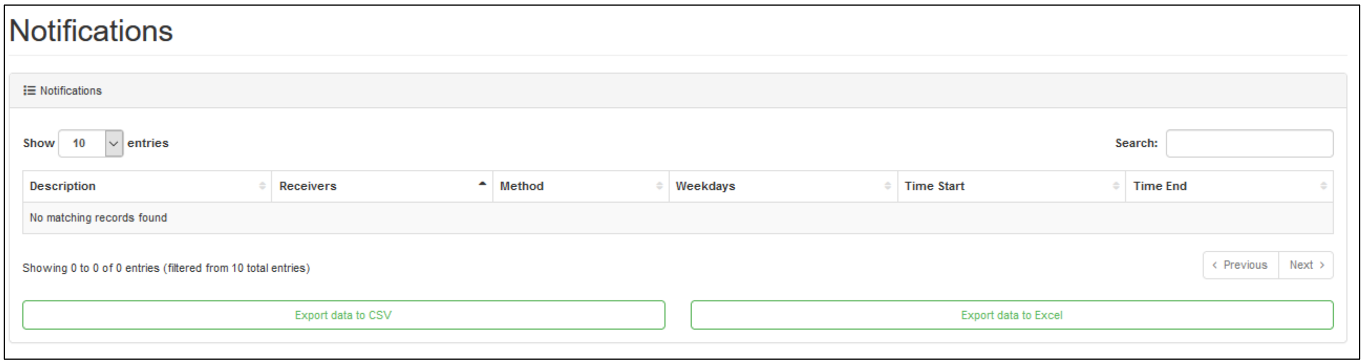
© Copy Right All rights reserved

13 Notifications Manager

13.1 Notifications List

Notifications Manager > Notifications List

The list of notifications will be shown



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

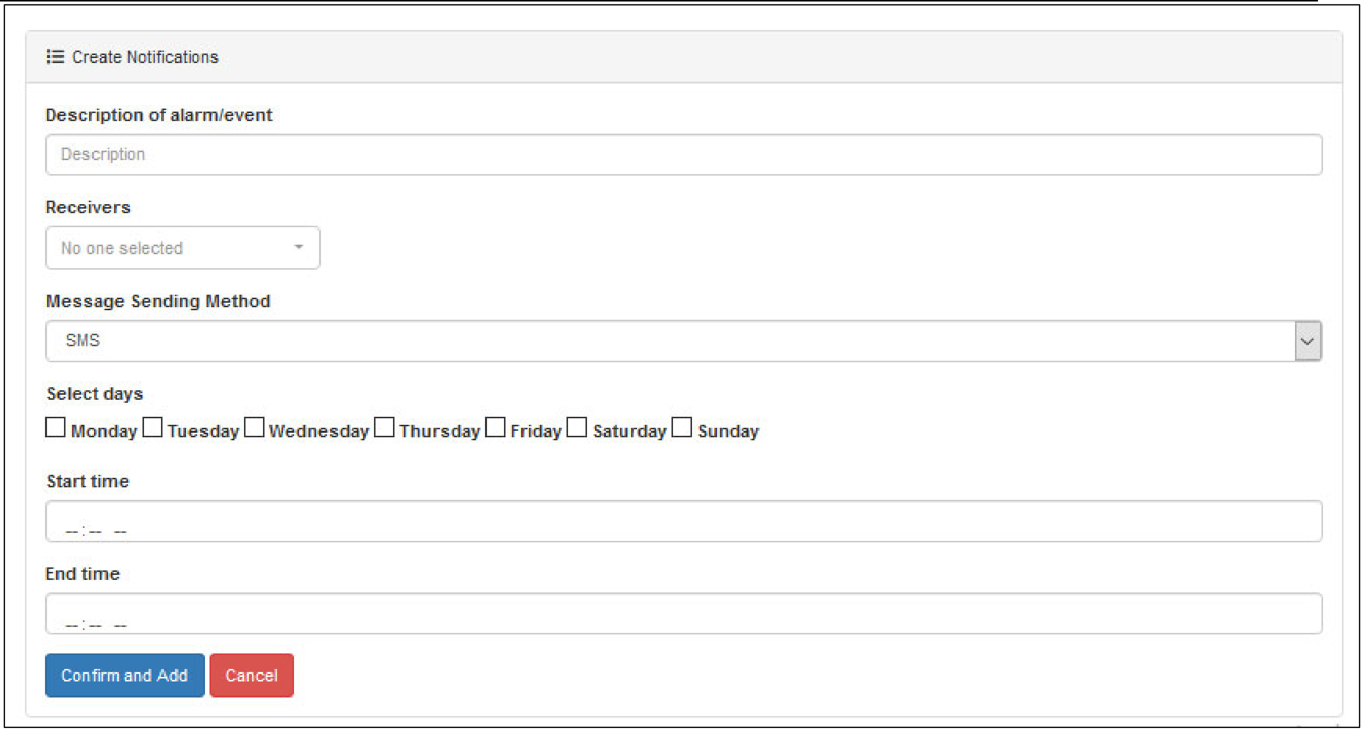
The user can also export the notifications data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

13.2 Create Notification

Notifications Manager > Create Notification

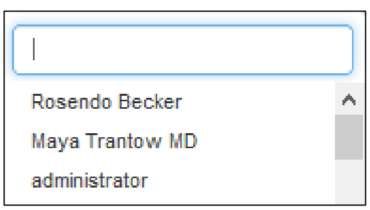
This will bring up create notifications as shown below

© Copy Right All rights reserved

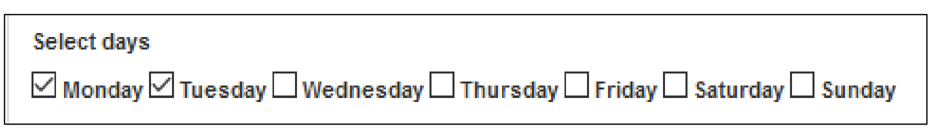


Fill in the fields to create a new notification

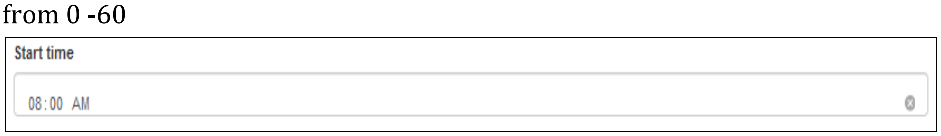
- Description of alarm/event: The description of alarm/event **This shall be copied from the Alarm/Events table on the Dashboard and pasted in here**
- Receivers: The receivers can be selected from the dropdown

  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

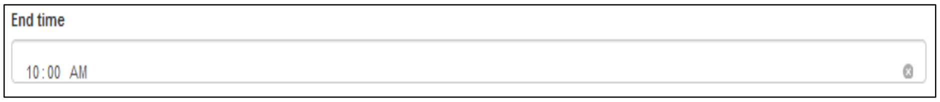


- Start time: **Enter the start time after which the notification can be sent.** Note this has to be in 'hh:mm AM/PM' format where 'hh' (hour)can have values from 0 -12 and 'mm'(minute) can have values from 0 -60

© Copy Right All rights reserved

- 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



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

© Copy Right All rights reserved

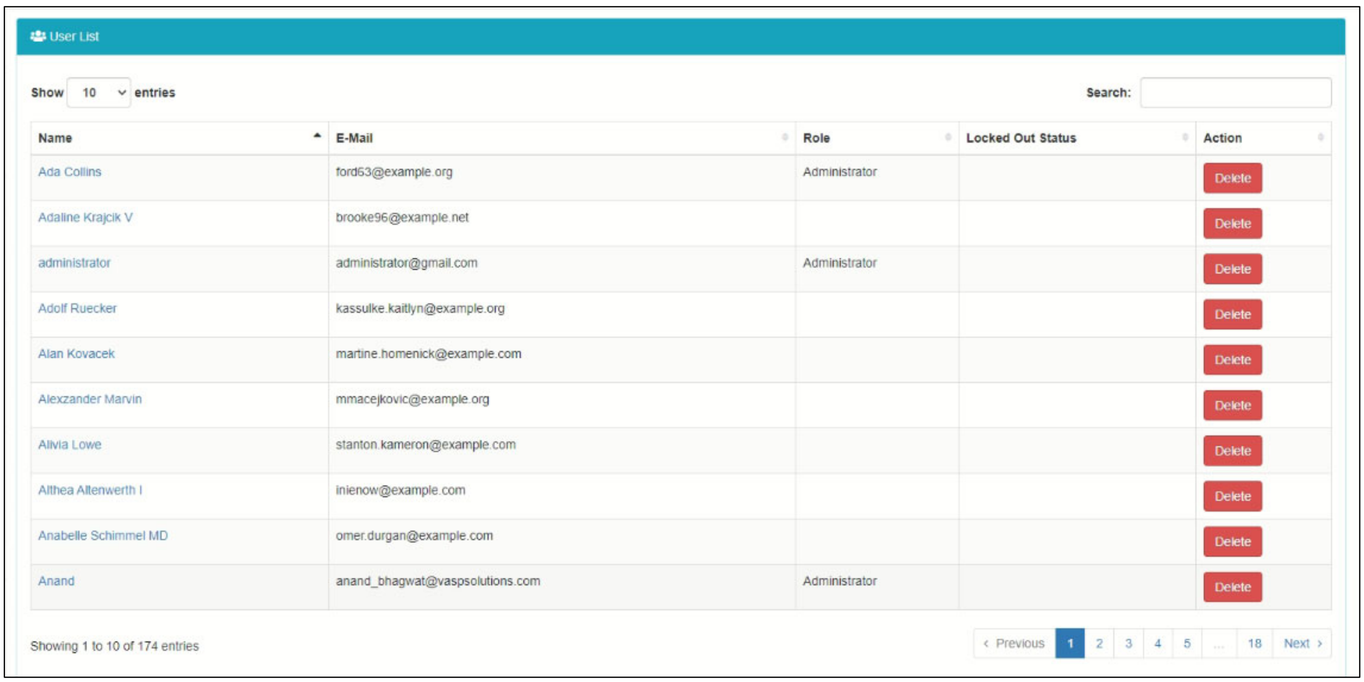
14 Admin

14.1 User Admin

14.1.1 User List

Admin > User Admin > User List

The list of the users in the system is shown



Name	E-Mail	Role	Locked Out Status	Action
Ada Collins	ford63@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
Alivia Lowe	stanton.kameron@example.com			Delete
Althea Altenwerth I	inienow@example.com			Delete
Anabelle Schimmel MD	omer.durgan@example.com			Delete
Anand	anand_bhagwat@vaspsolutions.com	Administrator		Delete

The following fields are shown in the list for the users

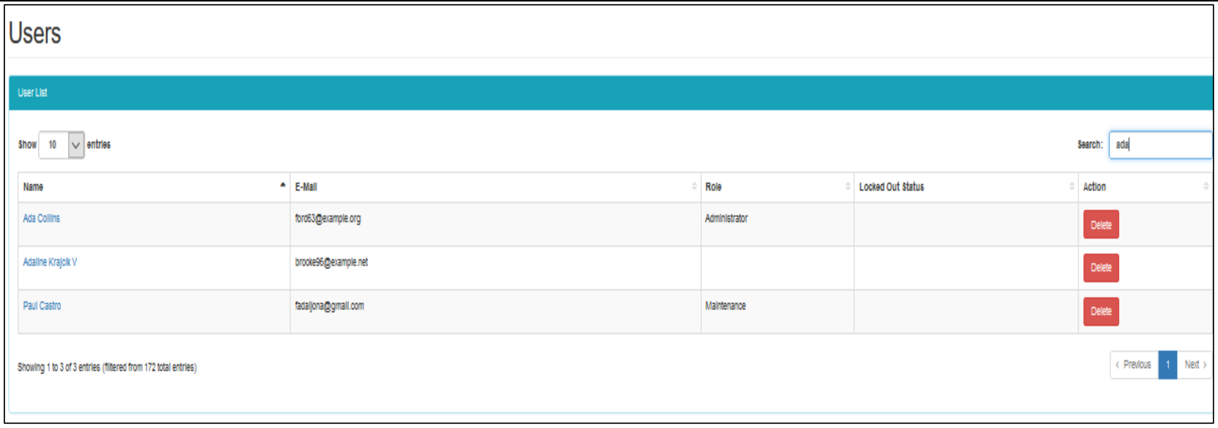
- Name: The full name of the user
- Email: The email of the user
- Role: The role of the user
- Locked-out status: Whether the user is locked out
- Action: Action which can be taken on the user

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

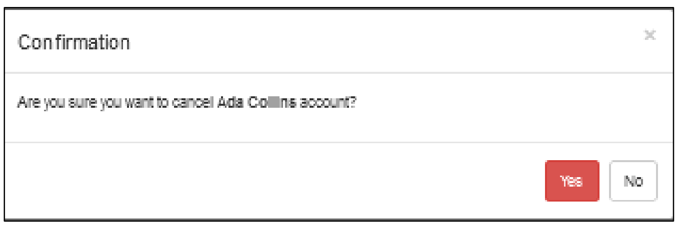
The number of users being shown and the change to page number can be changed via the corresponding option at the bottom of the grid

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

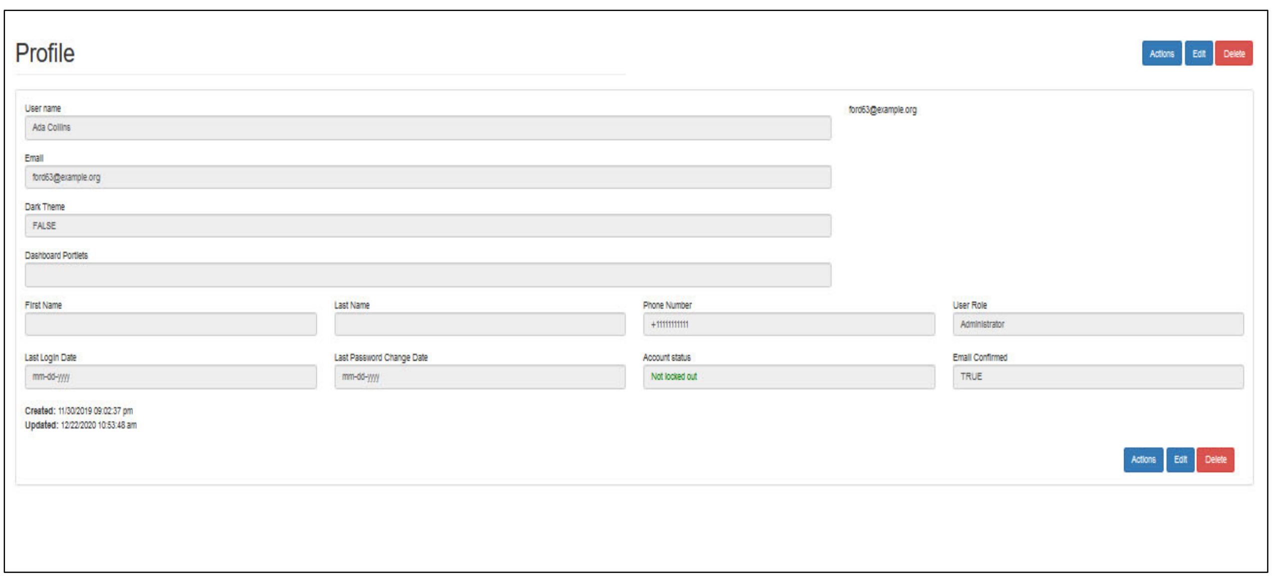
© Copy Right All rights reserved



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.



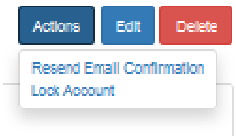
Clicking on the name of user will bring up the user profile view as shown below



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

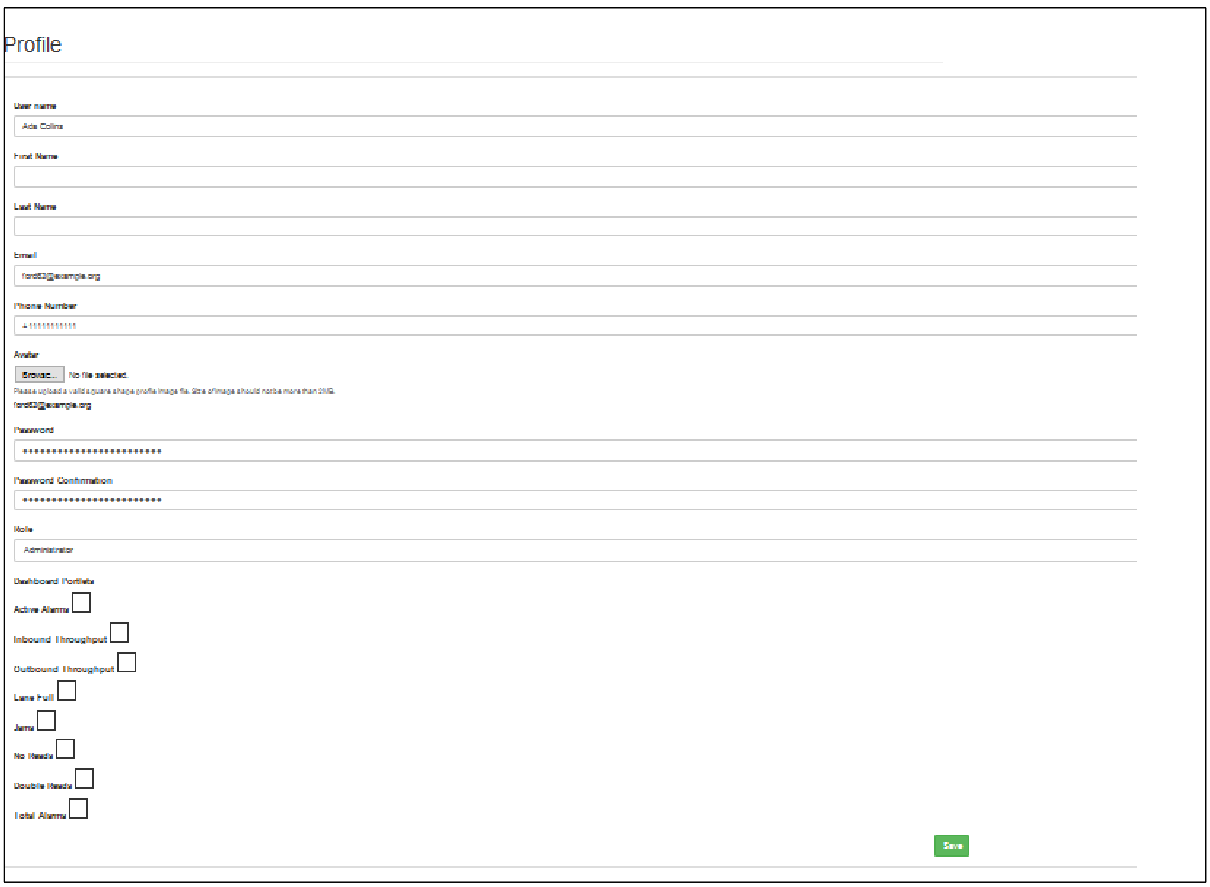
Clicking on the 'Actions' button will bring the following two options

© Copy Right All rights reserved



- ✓ 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



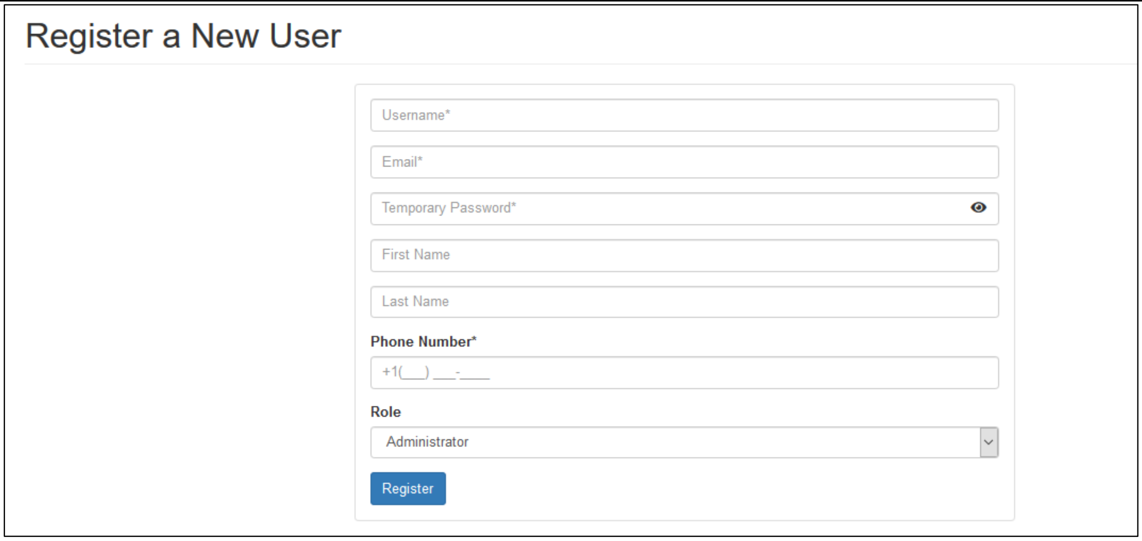
The admin can change all of the user profile settings including the password and Role and after 'Save' the changes will be saved and Admin will be taken back to the User Profile view with a confirmation message displayed.

14.1.2 Register New User

Admin > User Admin > Register New user

The Register a new user is shown as below

© Copy Right All rights reserved



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

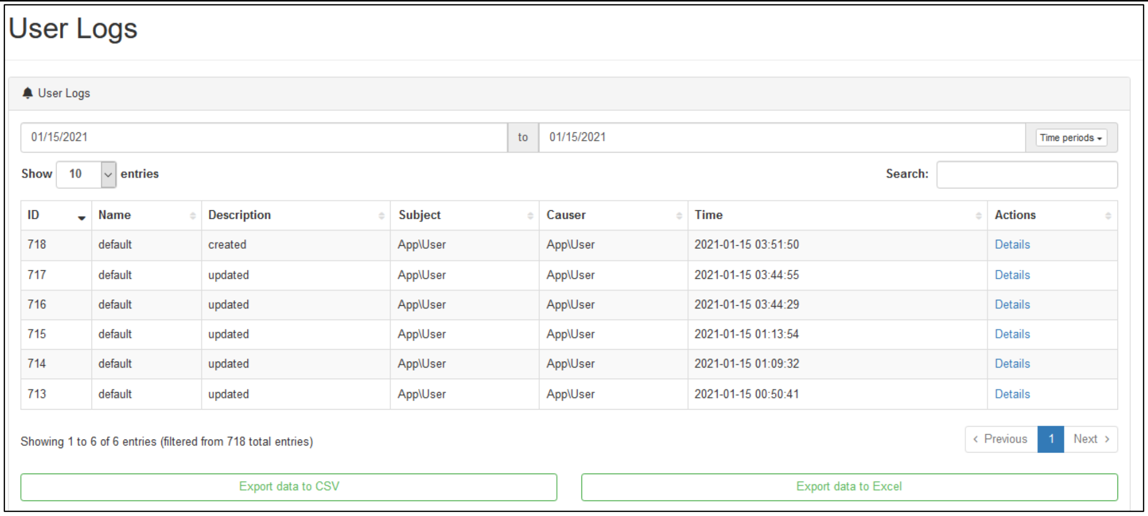
- Username: User name of the user. This should be unique in the system, if not system will not accept. This is usually the First and Last Name of the user
- Email: Email of the user. This should be unique in the system, if not the system will not accept. The username and temporary password will be send 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.

© Copy Right All rights reserved



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	App\User	App\User	2021-01-15 03:51:50	Details
717	default	updated	App\User	App\User	2021-01-15 03:44:55	Details
716	default	updated	App\User	App\User	2021-01-15 03:44:29	Details
715	default	updated	App\User	App\User	2021-01-15 01:13:54	Details
714	default	updated	App\User	App\User	2021-01-15 01:09:32	Details
713	default	updated	App\User	App\User	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

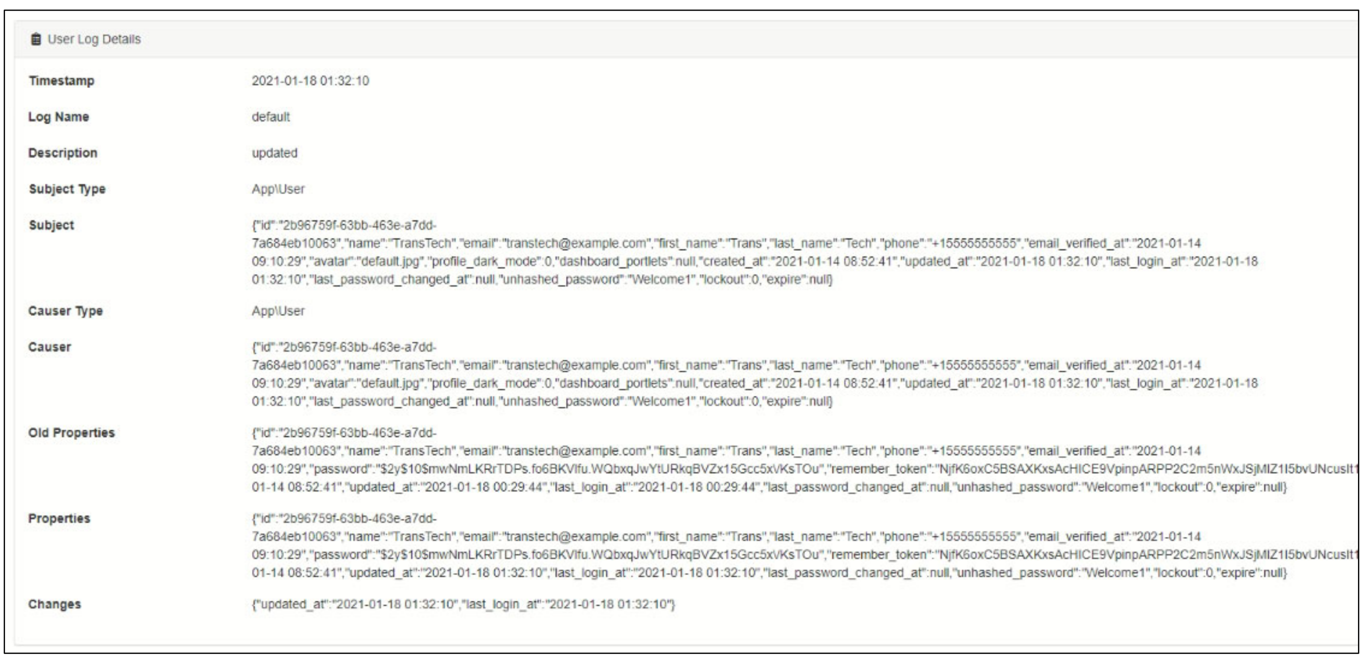
The Admin can choose the time period for which logs are to be shown either by specifying the start date and the 'To' date, or by selecting the time period from the Time periods dropdown (Today, Yesterday, This week etc.)

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	App\User
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	App\User
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$10$mwNmLKRrTDPs.fo6BKVlfu.WQbxqJwYtURkqBVZx15Gcc5xVKsTOu","remember_token":"NjfK6oxC5BSAXKxsAcHICE9VpinpARPP2C2m5nWxJSjMIZ1I5bvUNcusIt1 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$10$mwNmLKRrTDPs.fo6BKVlfu.WQbxqJwYtURkqBVZx15Gcc5xVKsTOu","remember_token":"NjfK6oxC5BSAXKxsAcHICE9VpinpARPP2C2m5nWxJSjMIZ1I5bvUNcusIt1 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"}

© Copy Right All rights reserved

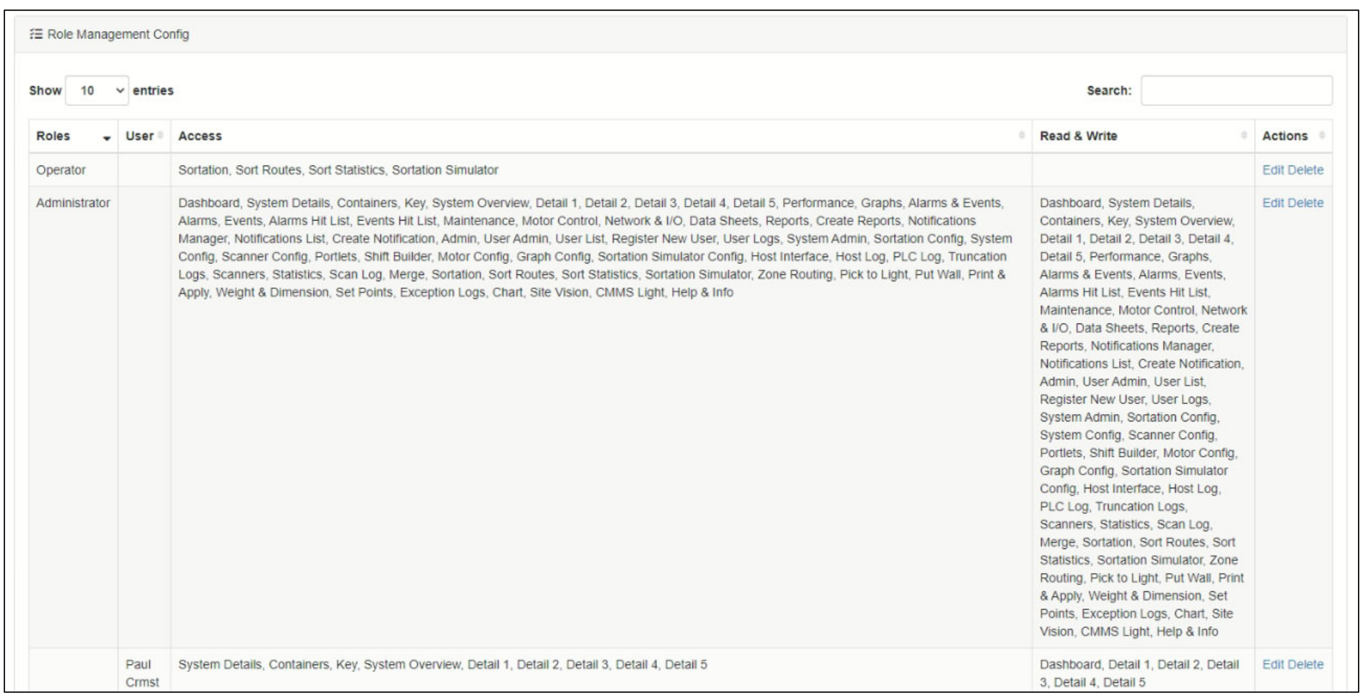
The user log details shown are (Note: Data is shown in Json format)

- 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

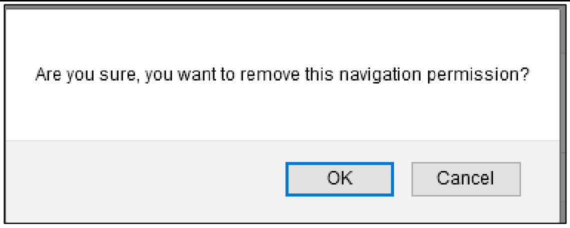
Show 10 entries Search:

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

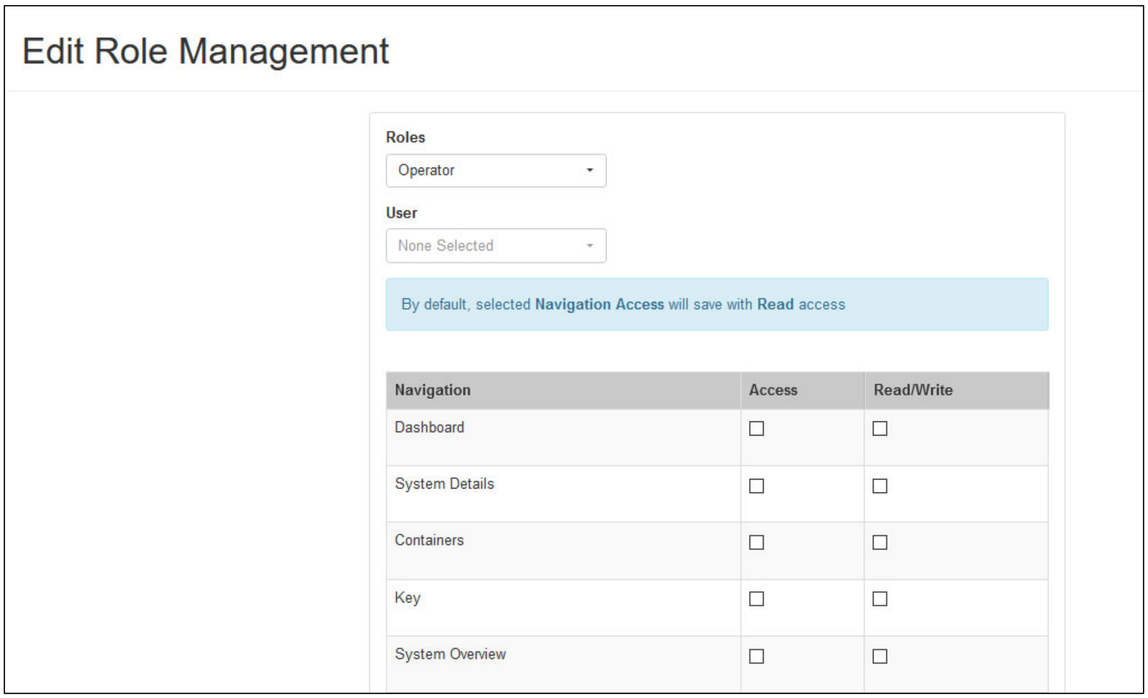
The list of role already configured is shown. The list has paging, sorting and export to CSV and Excel facilities as on other pages.

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

© Copy Right All rights reserved



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

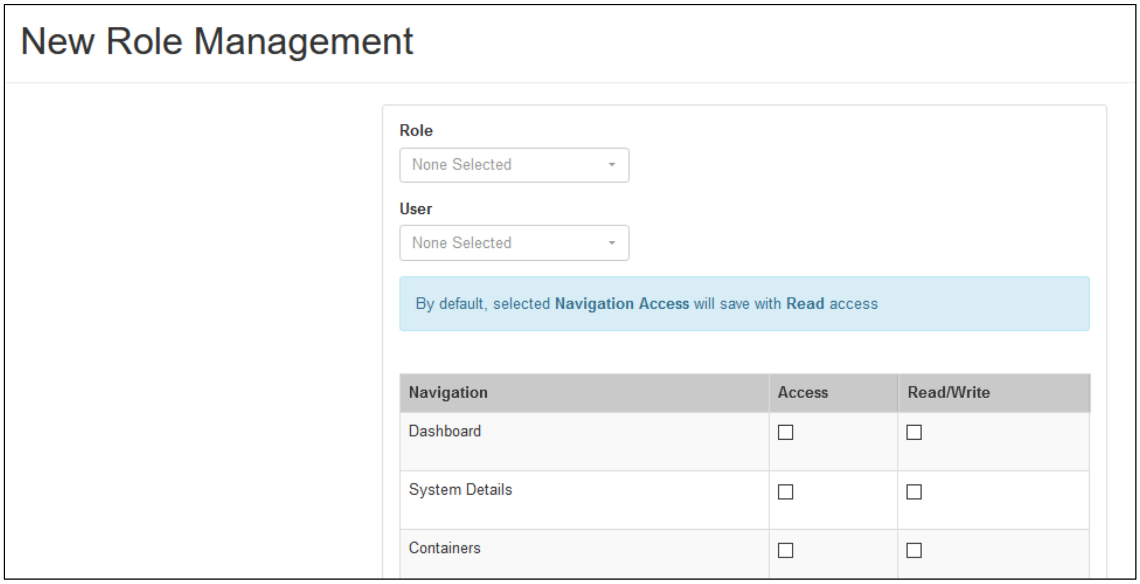


Here the Admin can choose the Role and User for which various Navigation options (permissions) are to be given and in what mode – "Access" controls whether or not the role will be able to see the page in the Navigation Bar and "Read/Write" controls whether the user has access to make changes on any given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

© Copy Right All rights reserved

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

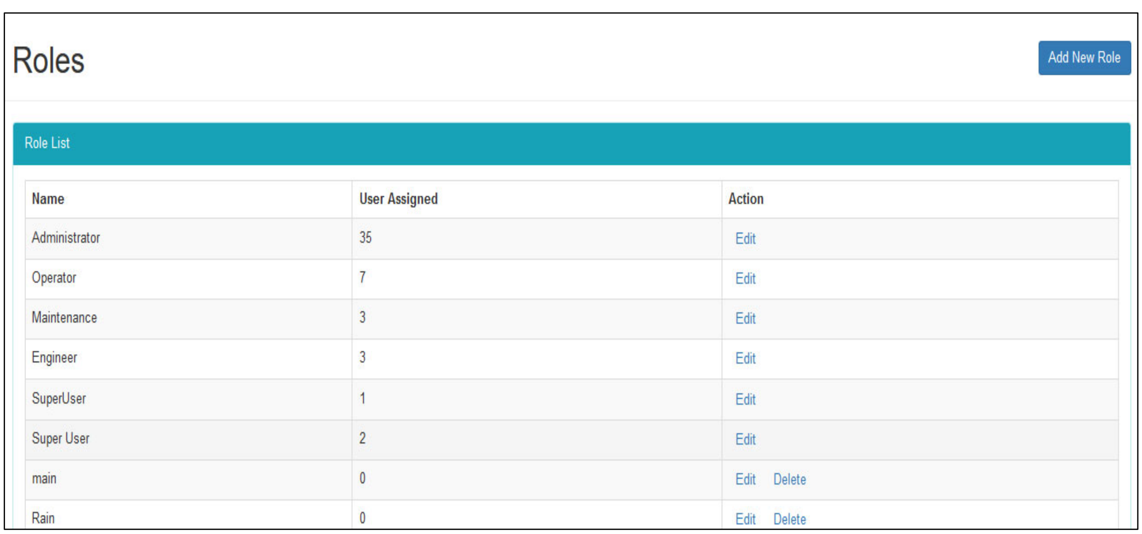


Here the Admin can choose the Role and User for which various Navigation options (permissions) are to be given and in what mode – "Access" controls whether or not the role will be able to see the page in the Navigation Bar and "Read/Write" controls whether the user has access to make changes on any given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

Role List

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

© Copy Right All rights reserved

Clicking on ‘Add New Role’ brings up the following screen

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

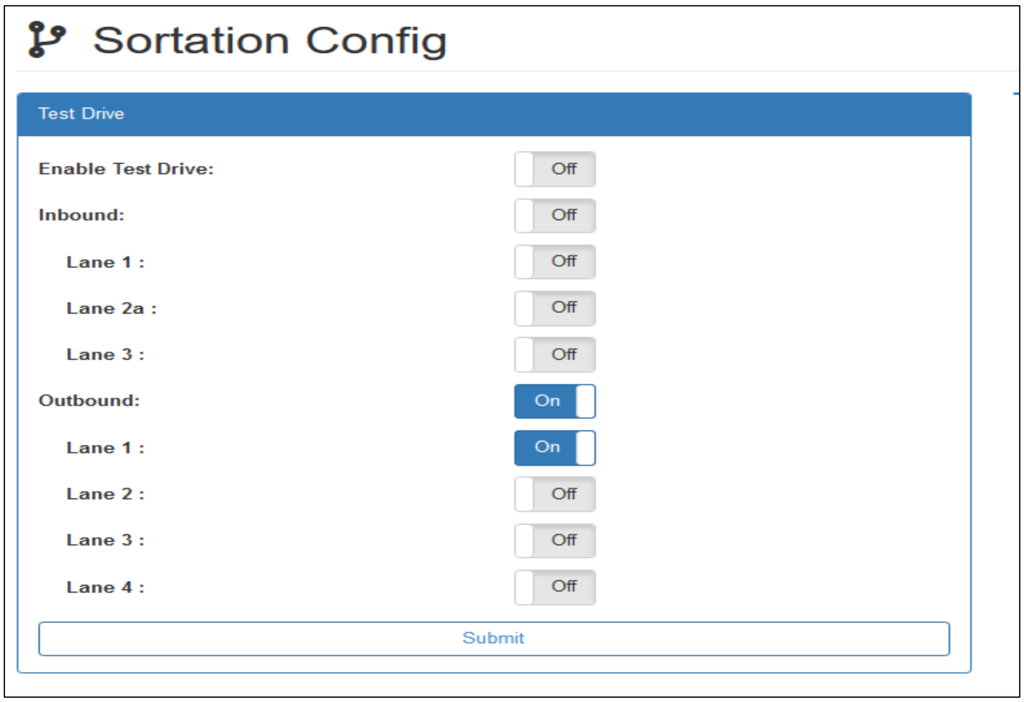
© Copy Right All rights reserved

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

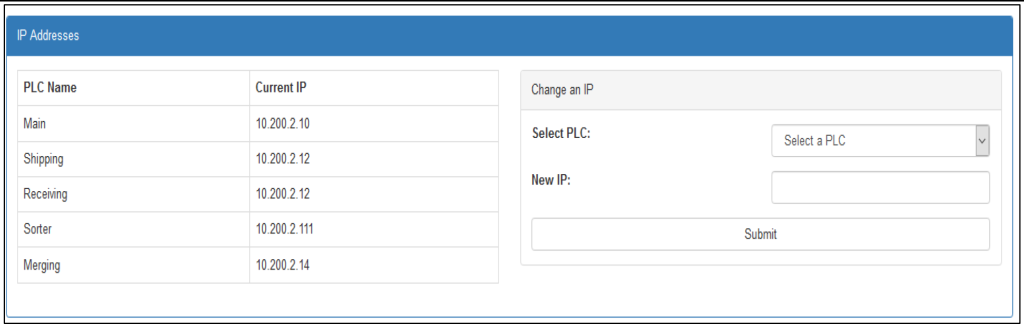
This has various sections via which system configurations can be set

14.2.2.1 IP Addresses

This shows the IP addresses configured in the system

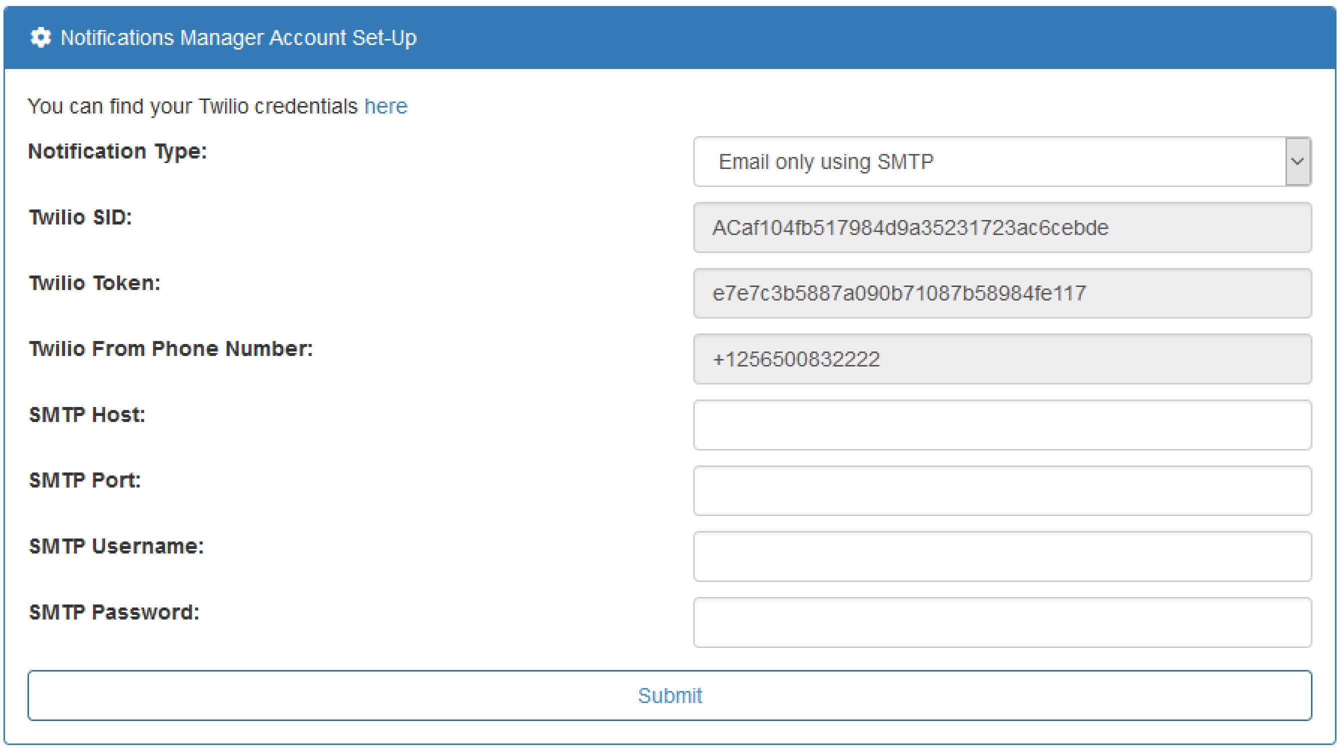
This section is to be changed and edited by Pendant Automation ONLY.

© Copy Right All rights reserved



14.2.2.2 Notifications Manager Account Set-Up

This allows setup of the notifications settings



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.

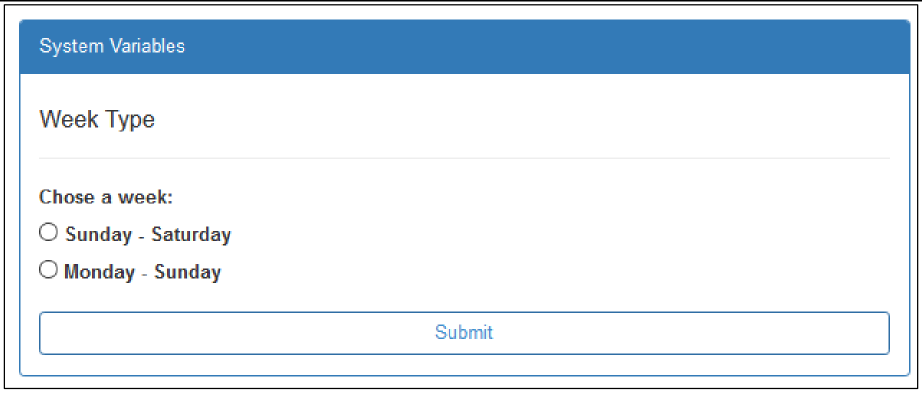
The Twilio SID, Token and From Phone Number for the account which is used to send out text messages can be set here and on Submit these will be saved

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

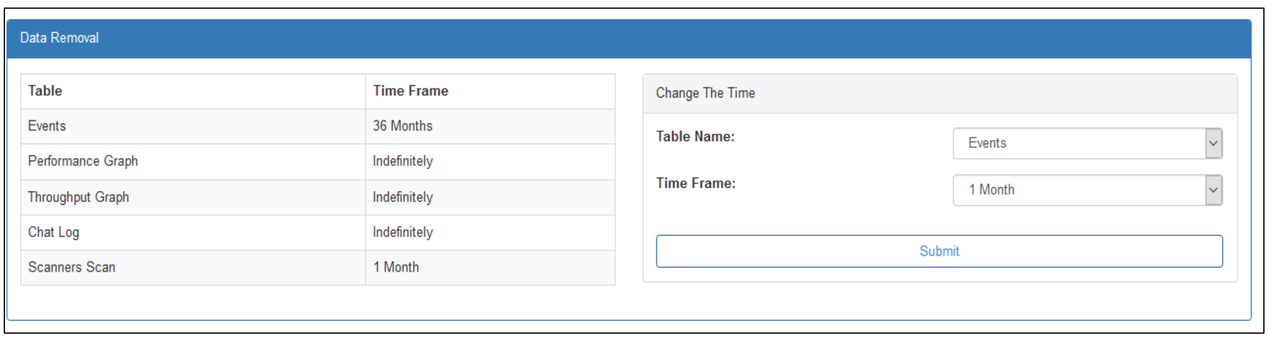
© Copy Right All rights reserved



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



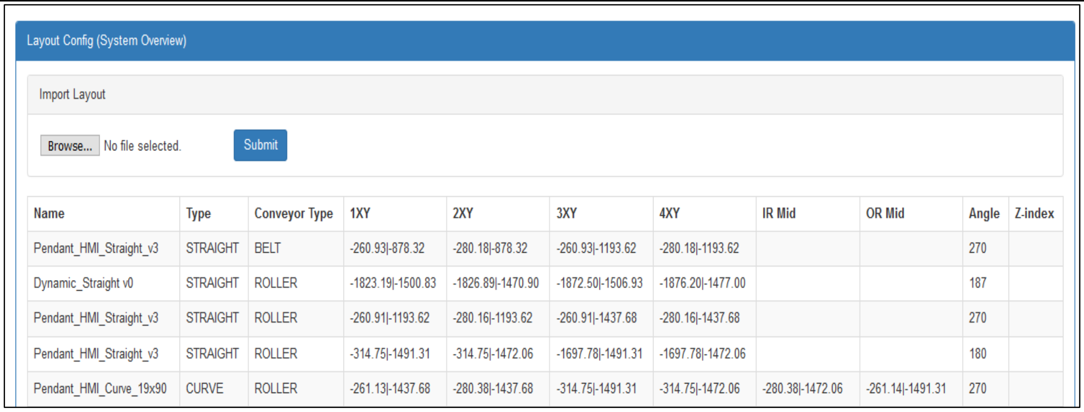
From the 'Change The Time box' the Admin can choose the Table Name and Time Frame and on Submit the setting will be saved

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.

© Copy Right All rights reserved



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	

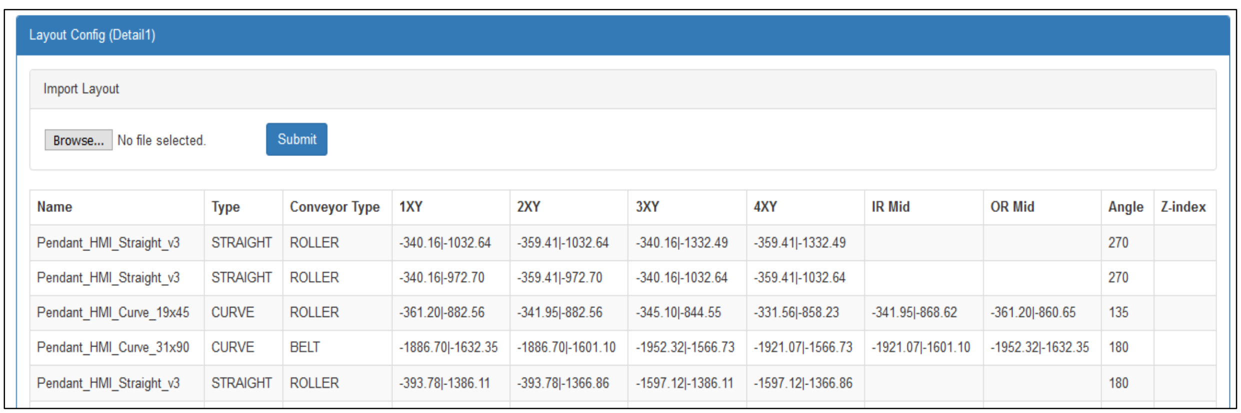
The Admin needs to upload the settings using an Excel file by selecting it using the Browse button. On Submit the data in the Excel will be used to set the values. In case there is an error in format or values specified in the Excel the system will show an error

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

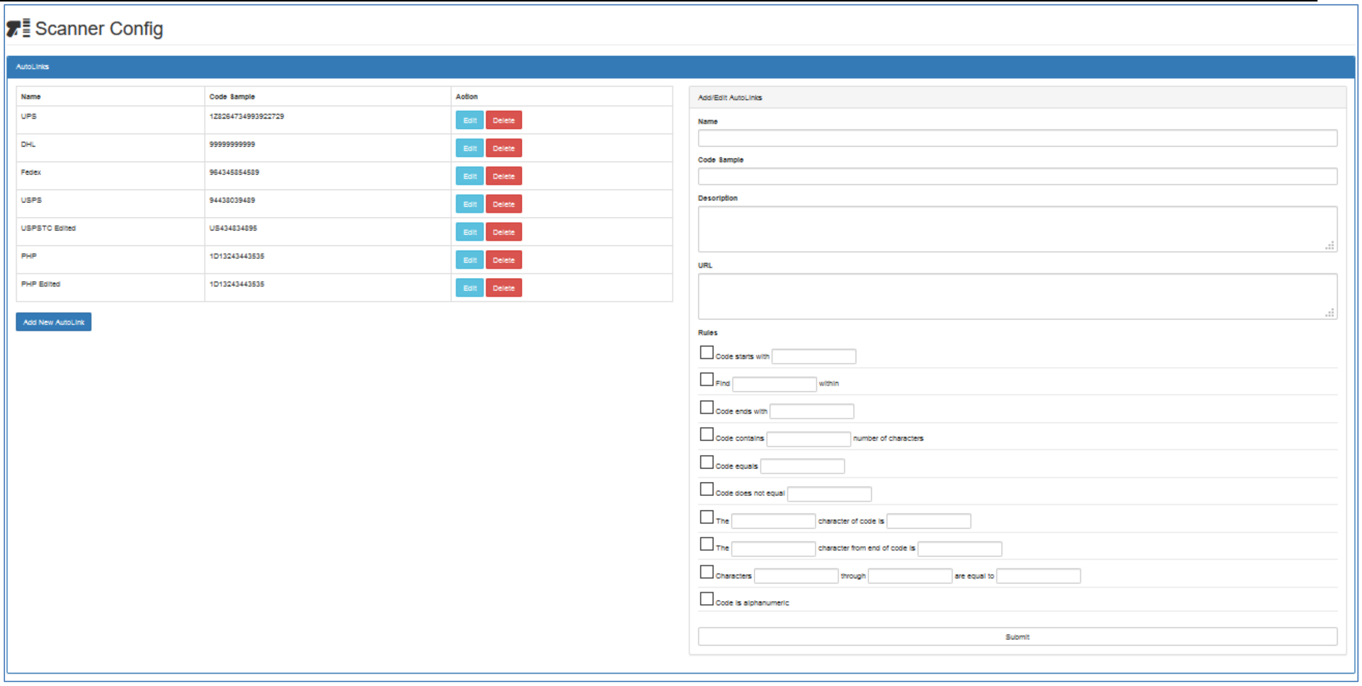
The Admin can also download the current settings using the Download button

14.2.3 Scanner Config

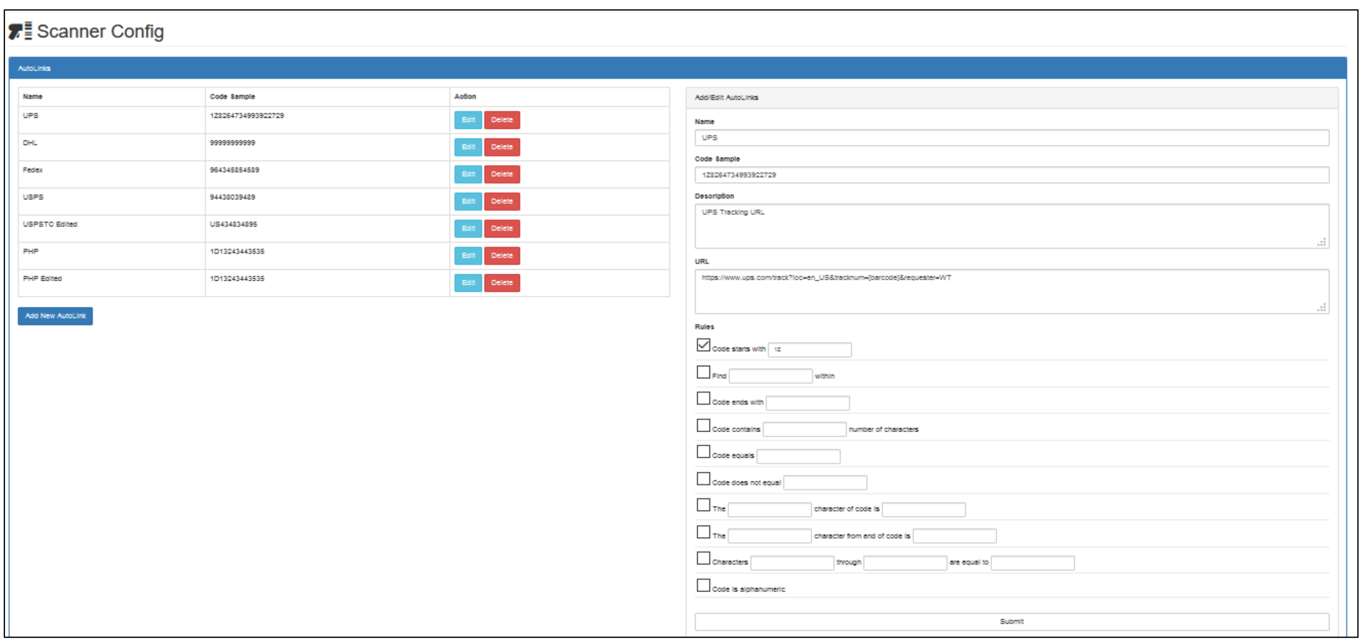
Admin > System Admin > Scanner Config

This shows the Scanner AutoLink Configuration

© Copy Right All rights reserved



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



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

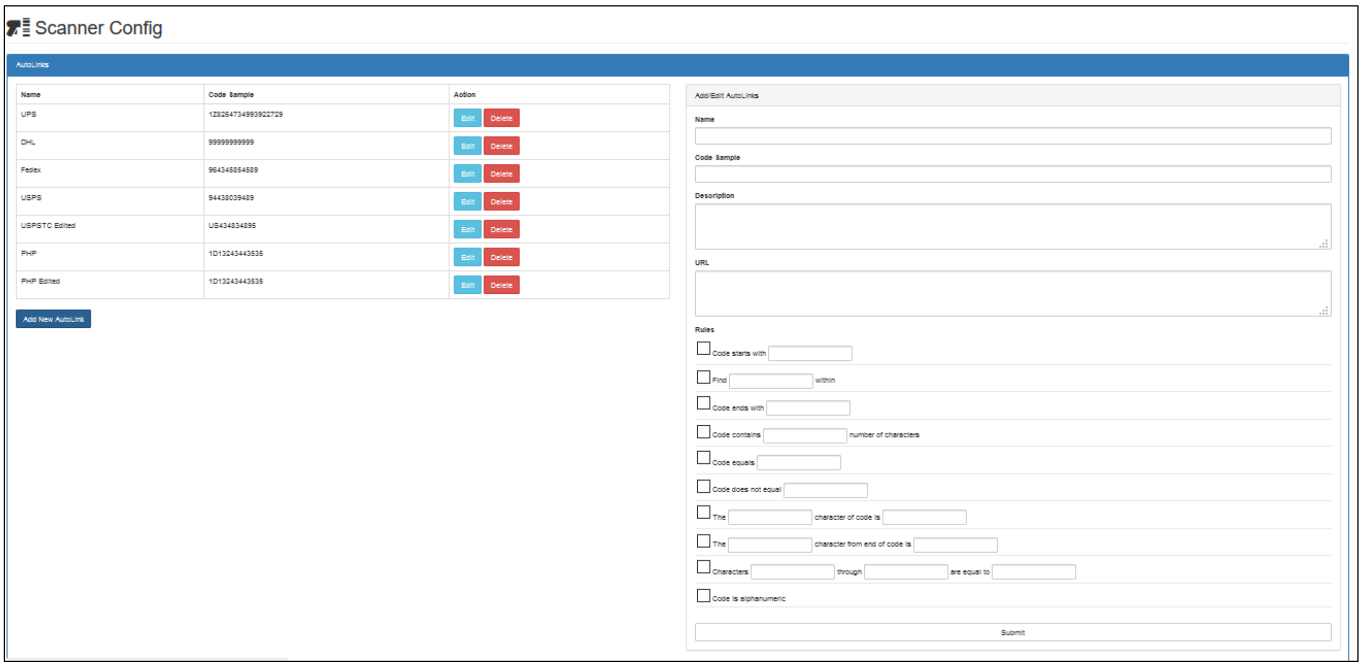
- Name : Name of scanner autolink
- Code Sample: Enter a sample of the barcode intended to be linked

© Copy Right All rights reserved

- 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



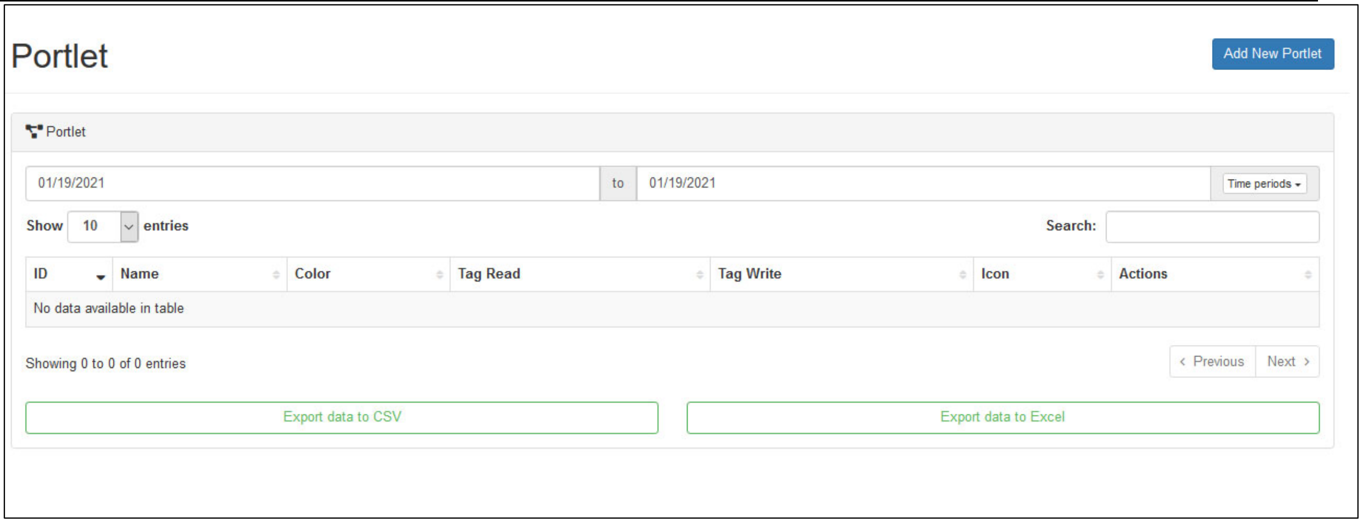
Fill in the information for the fields as described earlier in the Edit section. Please note the 'Name', 'URL', 'Code Sample' and 'Rules' fields are mandatory. Clicking on Submit will add the scanner autolink and it will then appear on the list of scanner autolinks on the left hand table.

14.2.4 Portlets

Admin > System Admin > Portlets

The list of the portlets in the system is shown

© Copy Right All rights reserved

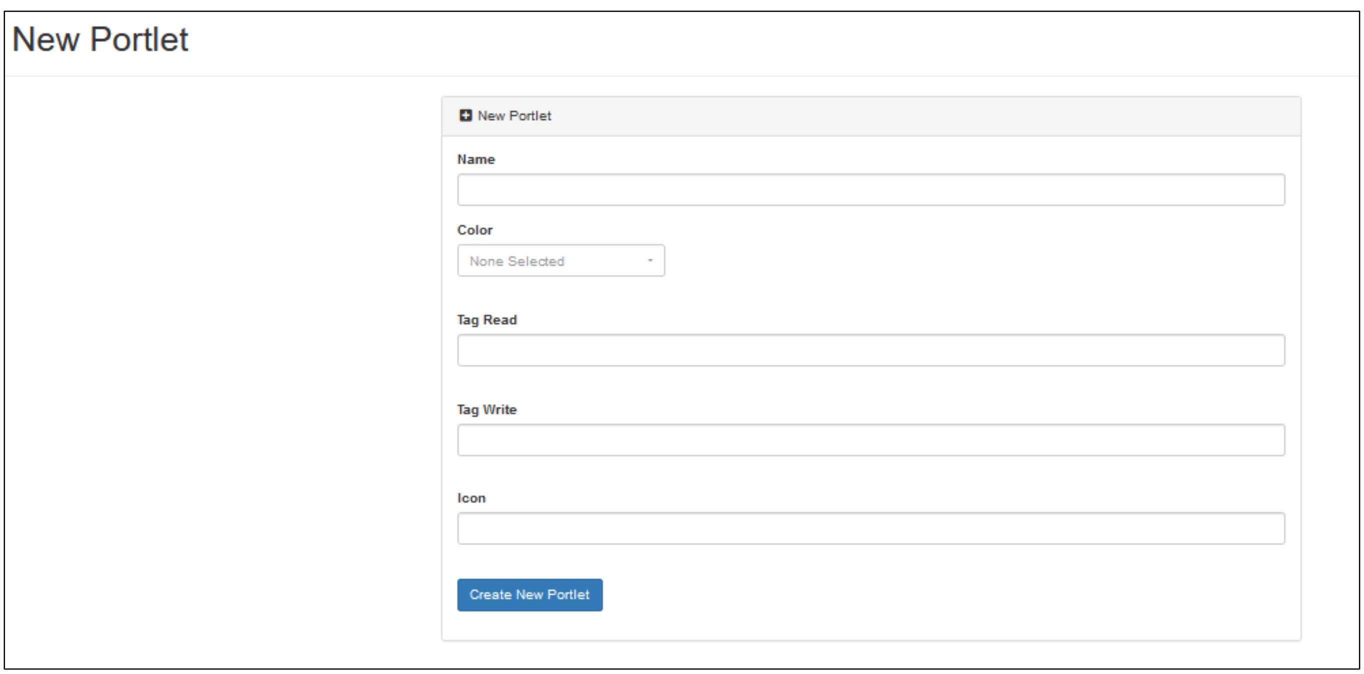


The list of portlets can be filtered either by specifying the start date and 'To' date or by specifying the Time periods via the 'Time periods' (Today, Yesterday, This Week etc.) dropdown

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



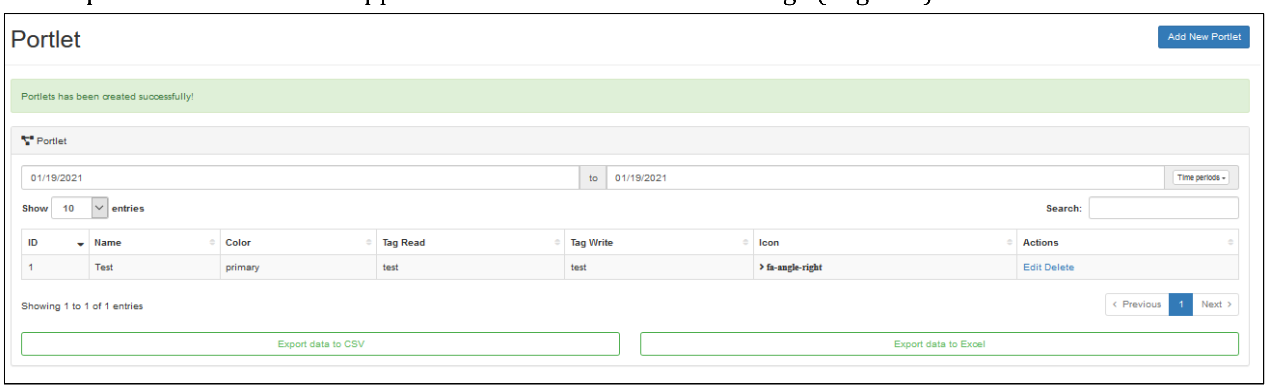
Add values in the fields

© Copy Right All rights reserved

- 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



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

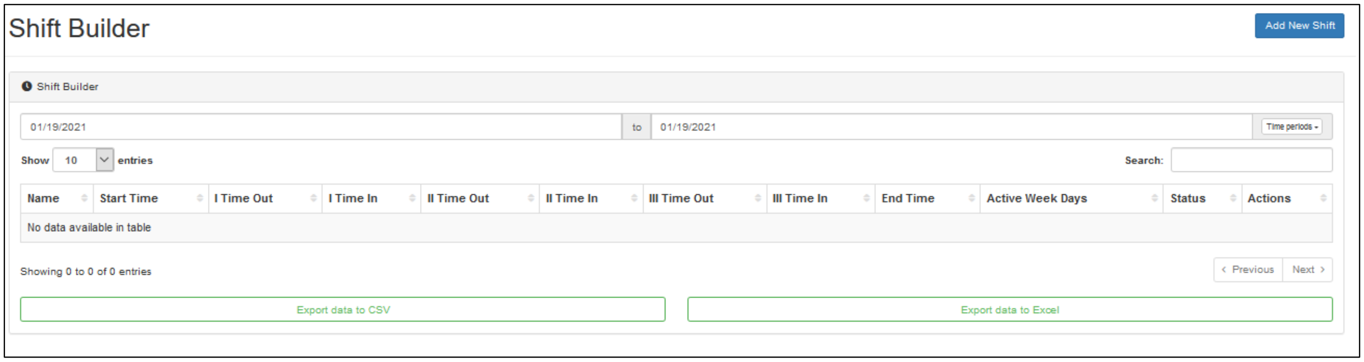
Note: after the creation of a new Portlet, the user can go to User Profile to check or uncheck the use of this new portlet

14.2.5 Shift Builder

Admin > System Admin > Shift Builder

© Copy Right All rights reserved

The list of the shifts in the system is shown

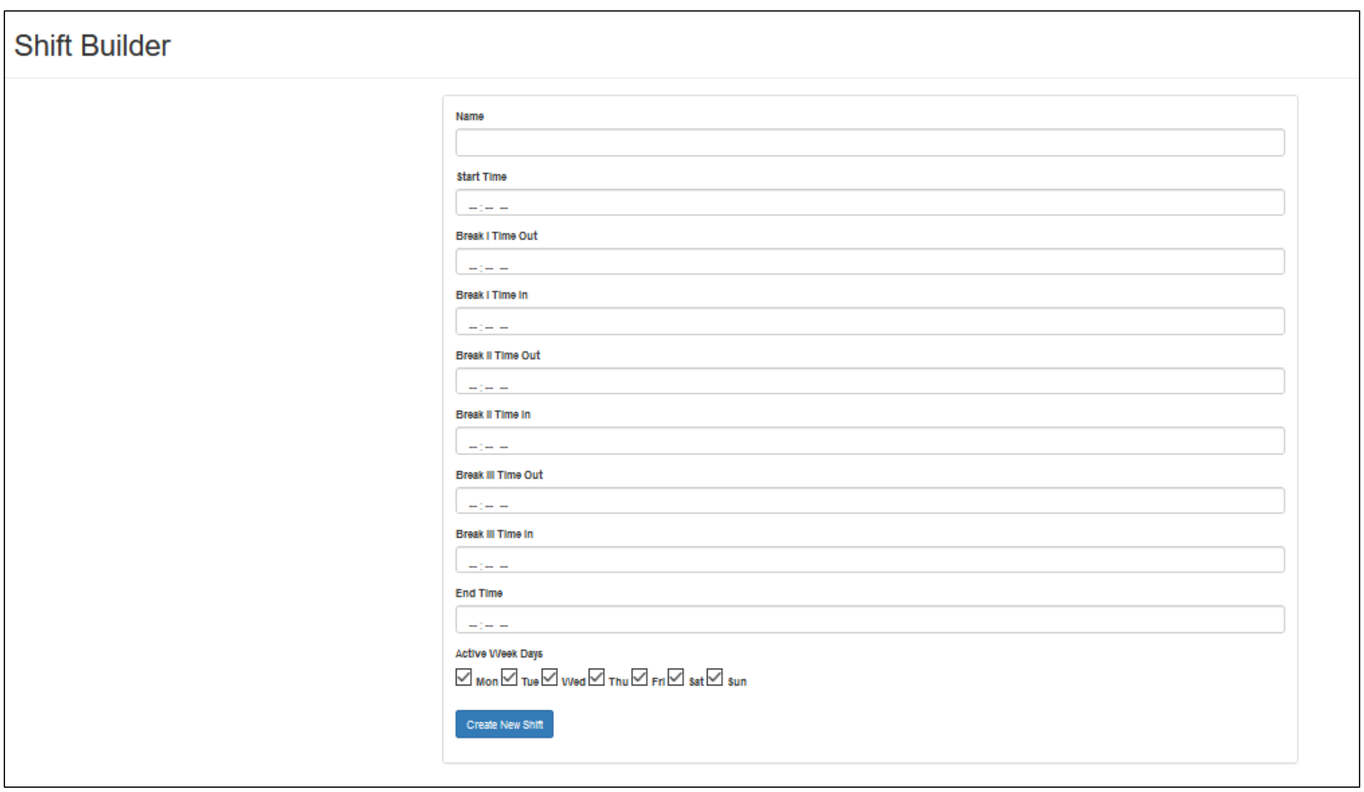


The list of shifts can be filtered either by specifying the start date and 'To' date or by specifying the Time periods via the 'Time periods' (Today, Yesterday, This Week etc.) dropdown

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

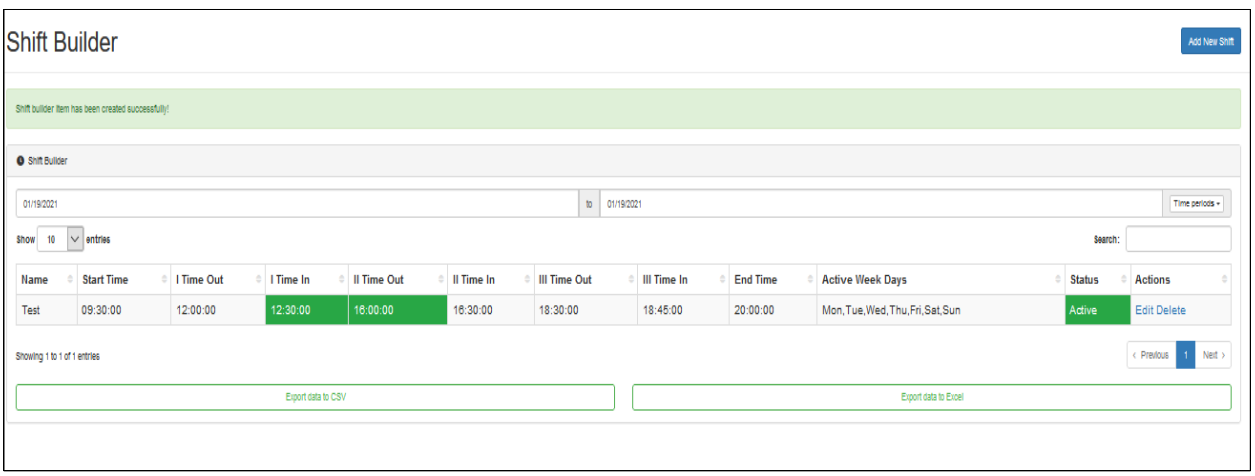


© Copy Right All rights reserved

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 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.

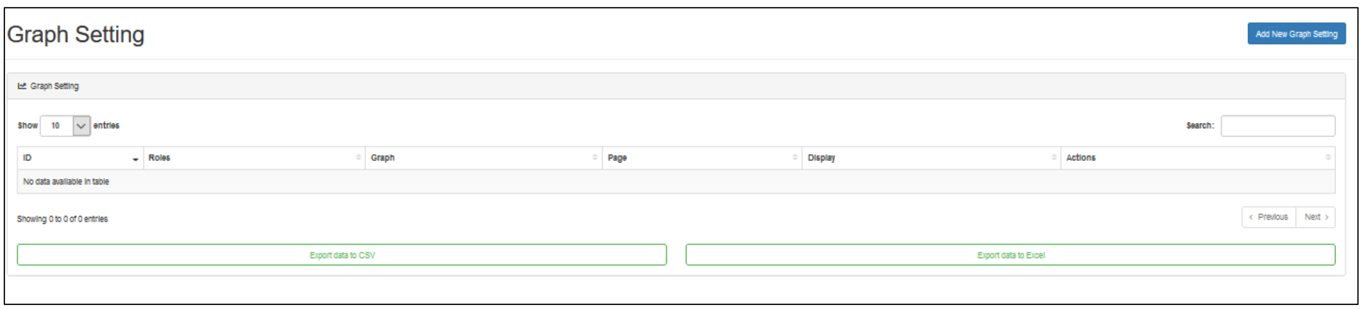
If a motor is added or deleted, or renamed within the system, visit this page to update the system with that motor in the WXS.

© Copy Right All rights reserved

14.2.7 Graph Config

Admin > System Admin > Graph Config

The list of the graph settings in the system is shown



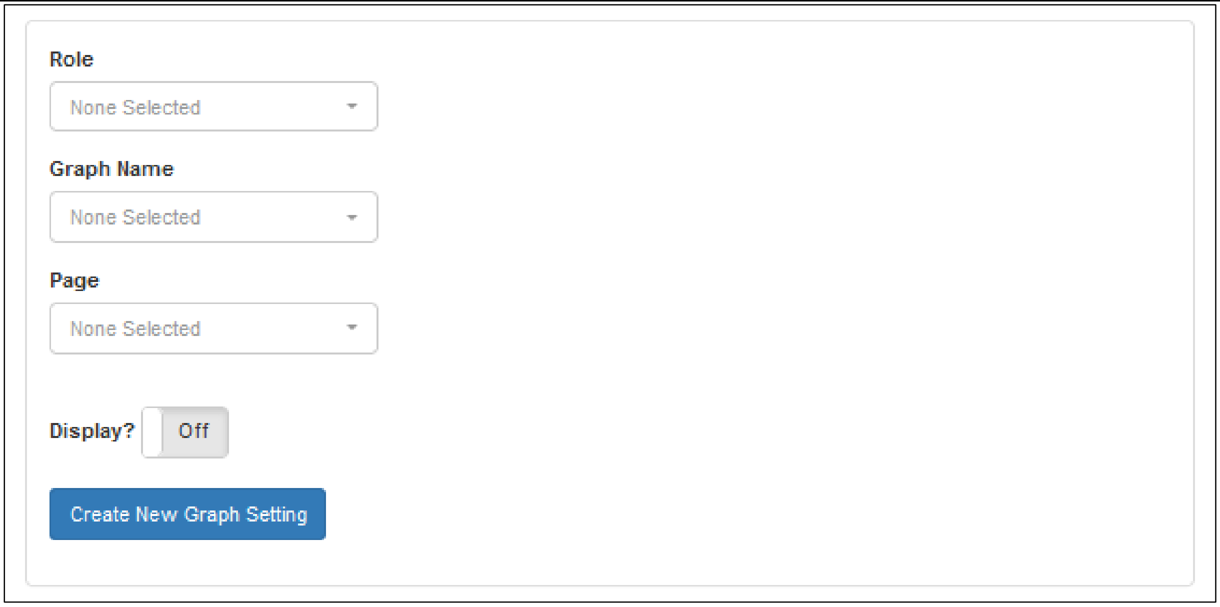
The list of graph settings can be filtered either by specifying the start date and 'To' date or by specifying the Time periods via the 'Time periods' (Today, Yesterday, This Week etc.) dropdown

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

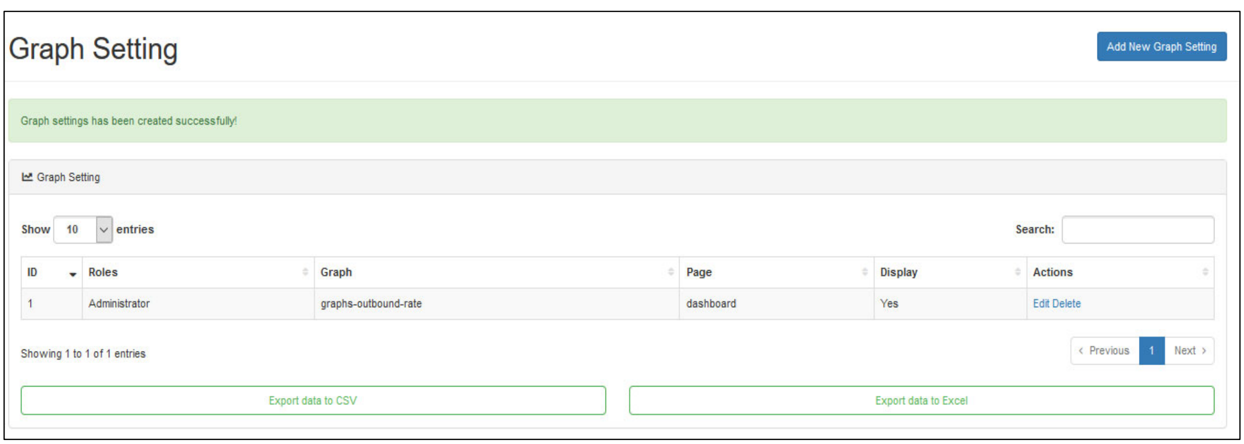
© Copy Right All rights reserved



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



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

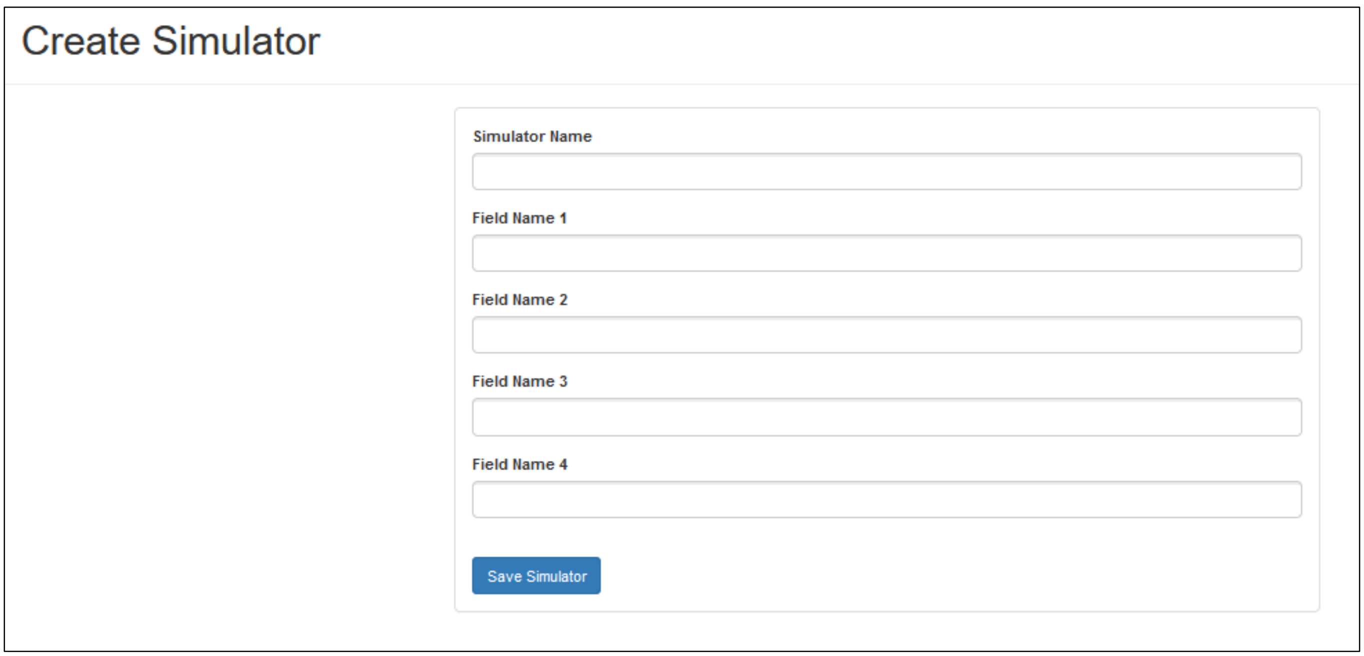
© Copy Right All rights reserved

14.2.8 Sortation Simulator Config

Admin > System Admin > Sortation Simulator Config

The list of the sortation simulators in the system is shown

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

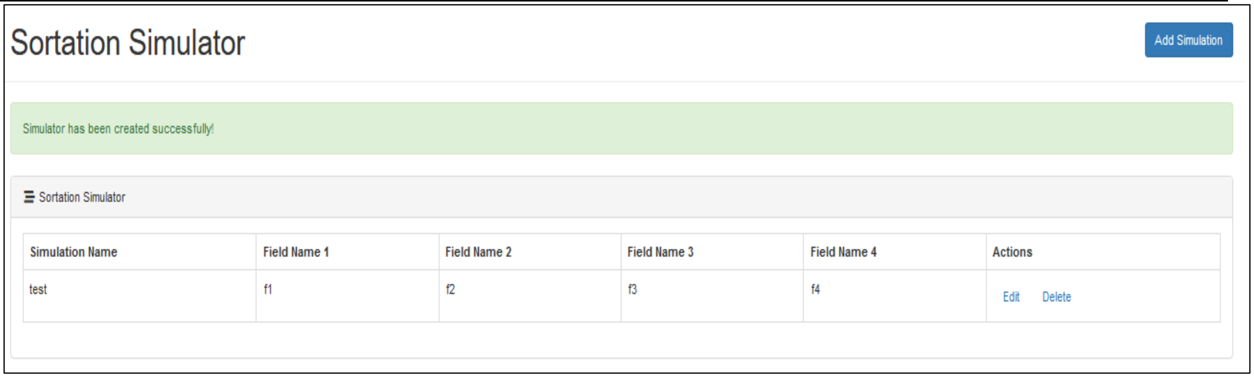


Add values in the fields

- 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

© Copy Right All rights reserved



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

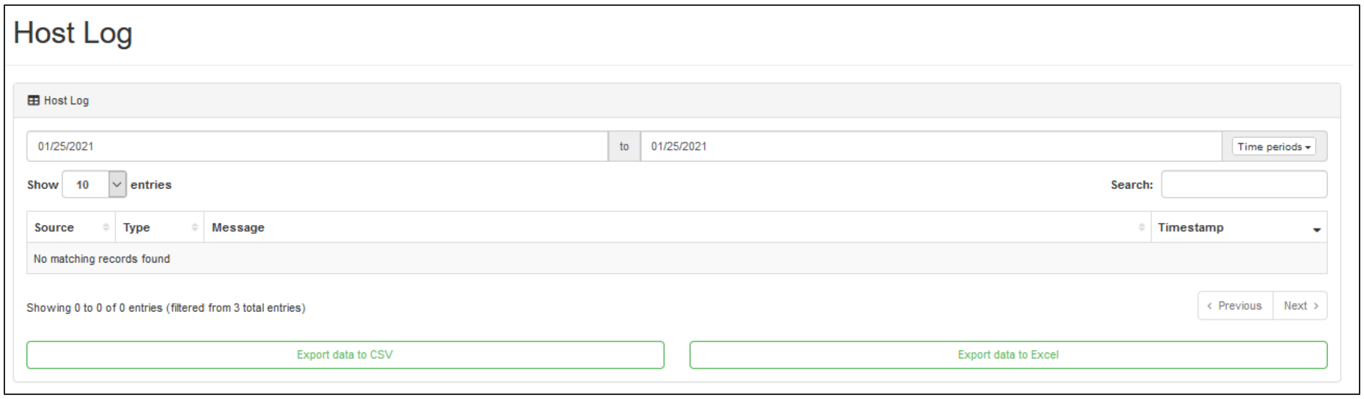
© Copy Right All rights reserved

15 Host Interface

15.1 Host Log

Host Interface > Host Log

The host log will be shown



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

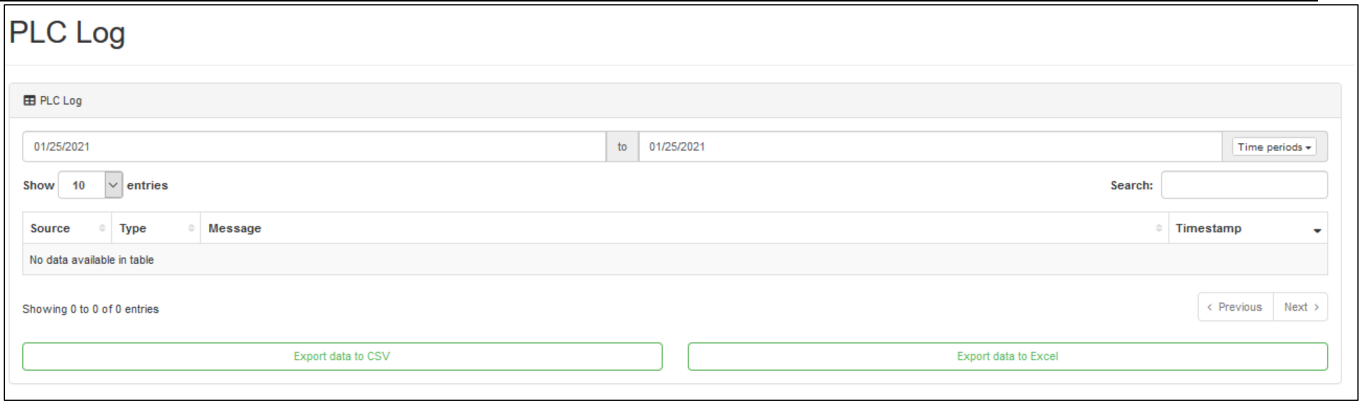
The user can also export the host log entries data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

15.2 PLC Log

Host Interface > PLC Log

The PLC log will be shown

© Copy Right All rights reserved



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

- Source: The source of the Communications (e.g., PLC to WXS; WXS to PLC)
- Type: The type of the Communication (e.g., Lane Request; Lane Assignment; Weight Check)
- Message: The message logged
- Timestamp: The timestamp when the log entry was created

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

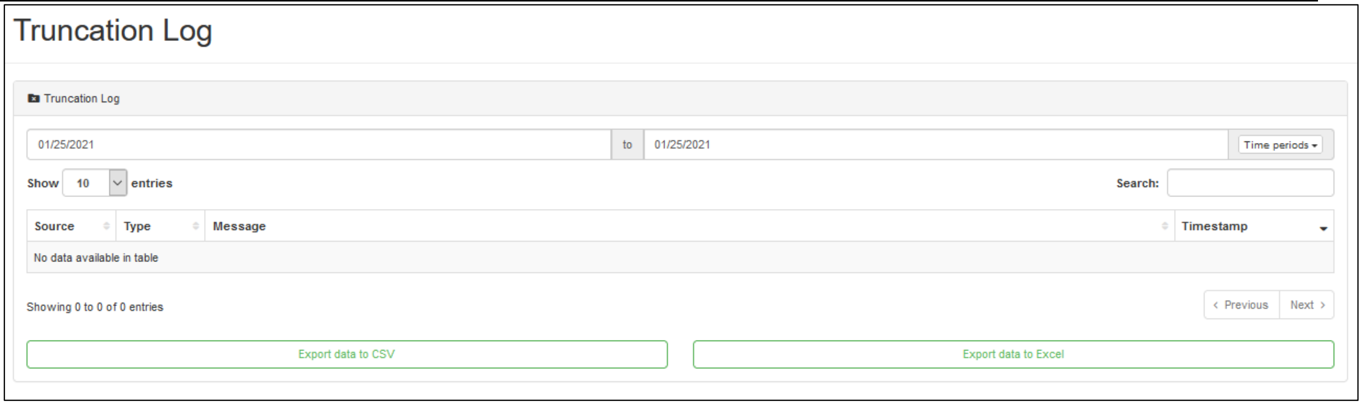
The user can also export the PLC log entries data to a CSV file or to an Excel file by clicking on the 'Export data to CSV' and 'Export data to Excel' respectively

15.3 Truncation Log

Host Interface > Truncation Log

The truncation log will be shown

© Copy Right All rights reserved



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

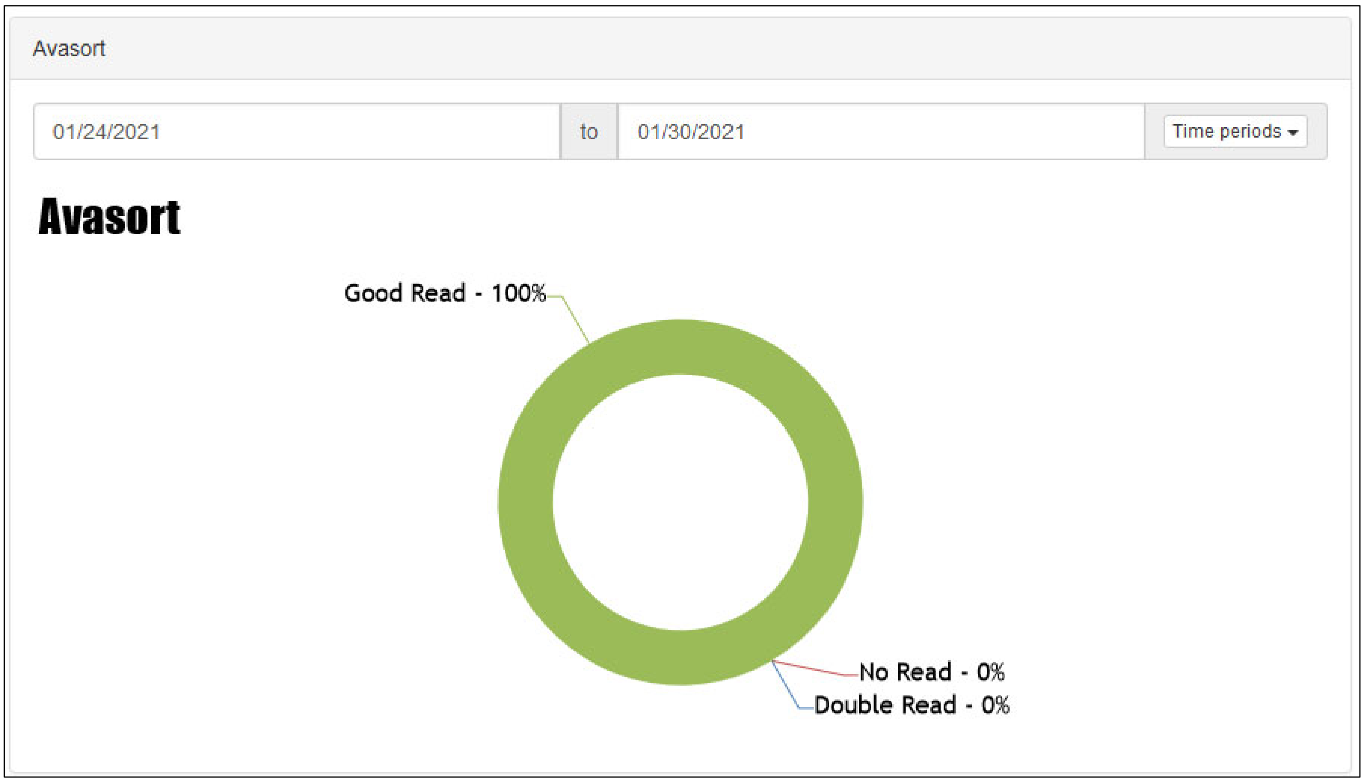
© Copy Right All rights reserved

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

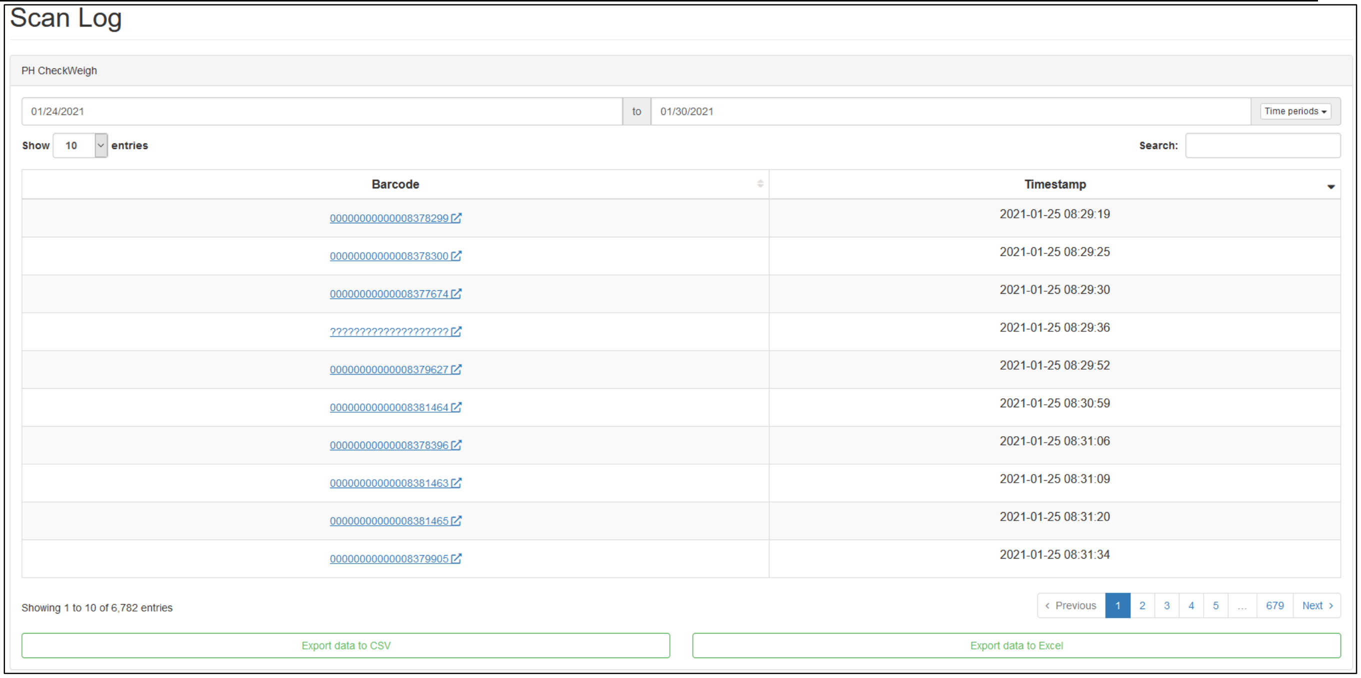
The data to show in the chart can be filtered either by specifying the start and 'To' date or by specifying the time period from the 'Time periods' dropdown (Today, Yesterday, This Week etc.)

16.2 Scan Log

Scanners > Log

This shows the logs for all scanners

© Copy Right All rights reserved



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

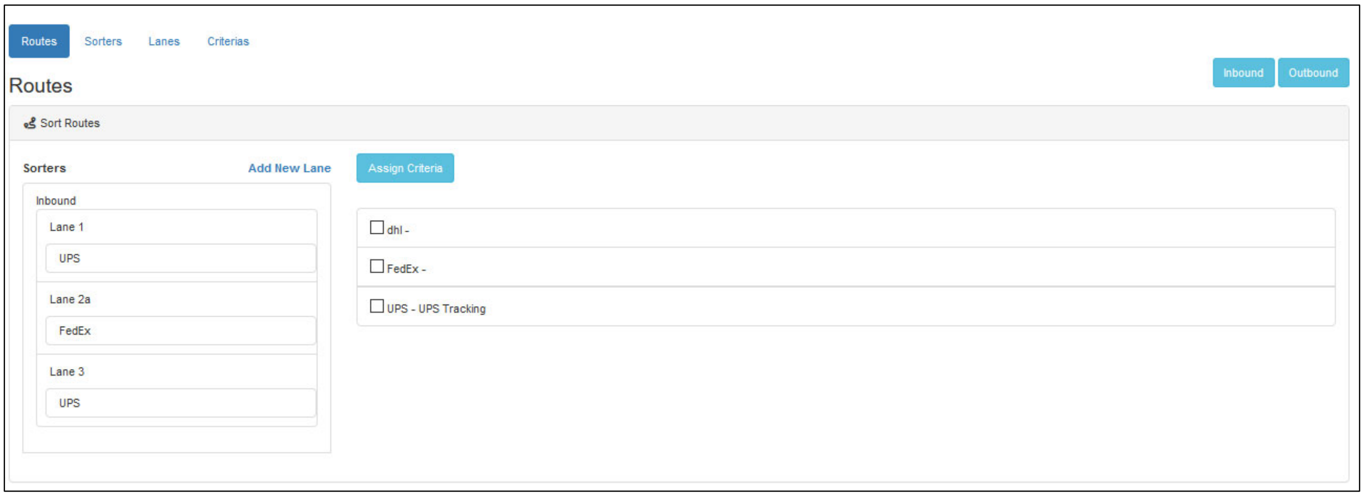
© Copy Right All rights reserved

17 Sortation

17.1 Sort Routes

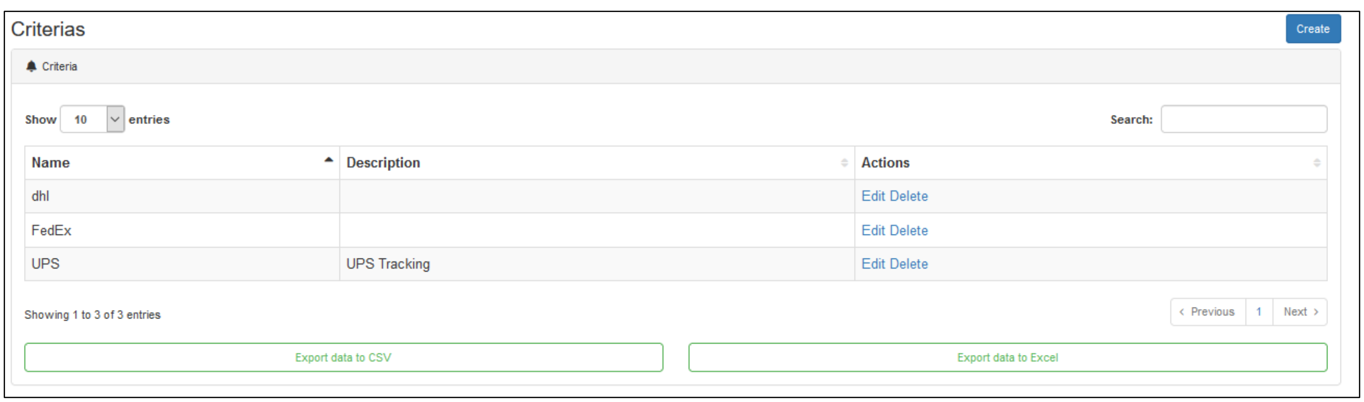
Sortation > Sort Routes

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



17.1.1 Criterias

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



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

© Copy Right All rights reserved

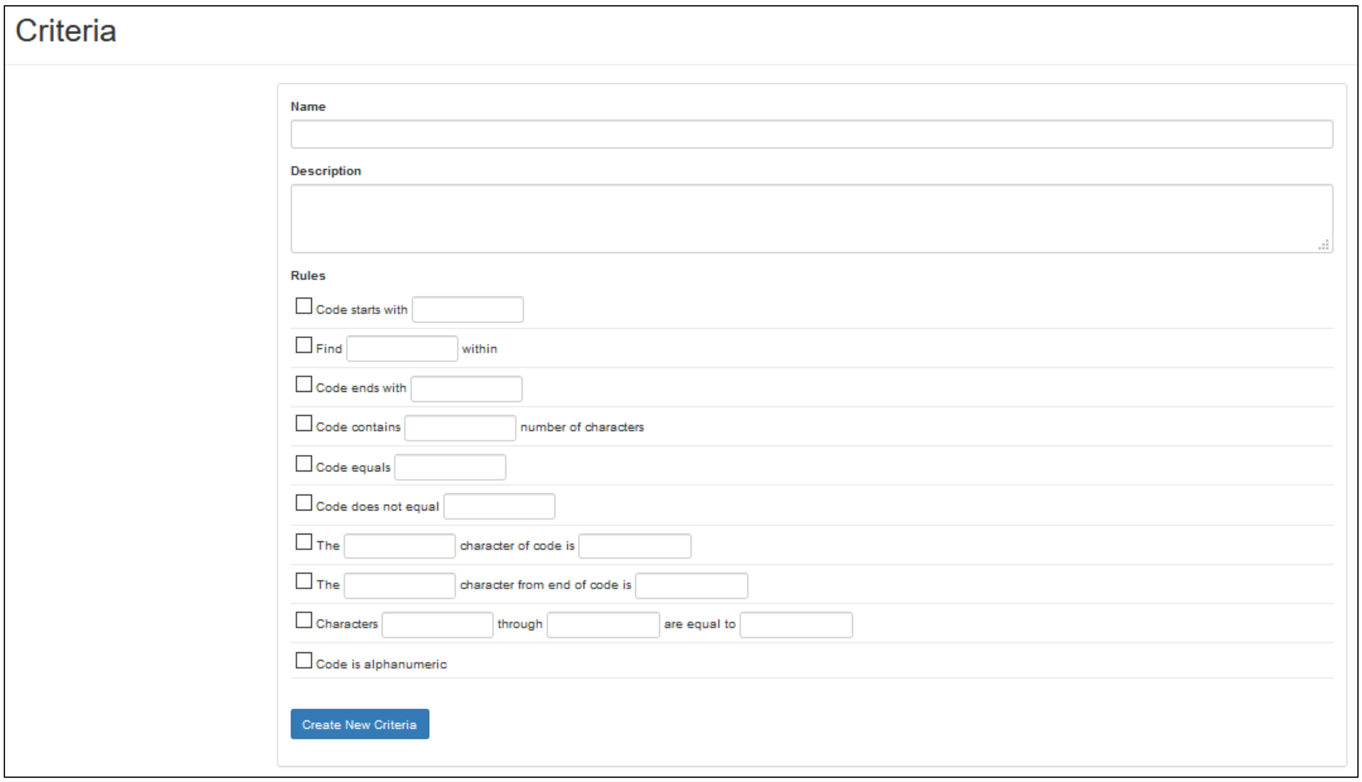
Clicking on a column header in the list toggles the sort order for the list between ascending and descending

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



The following fields need to be filled

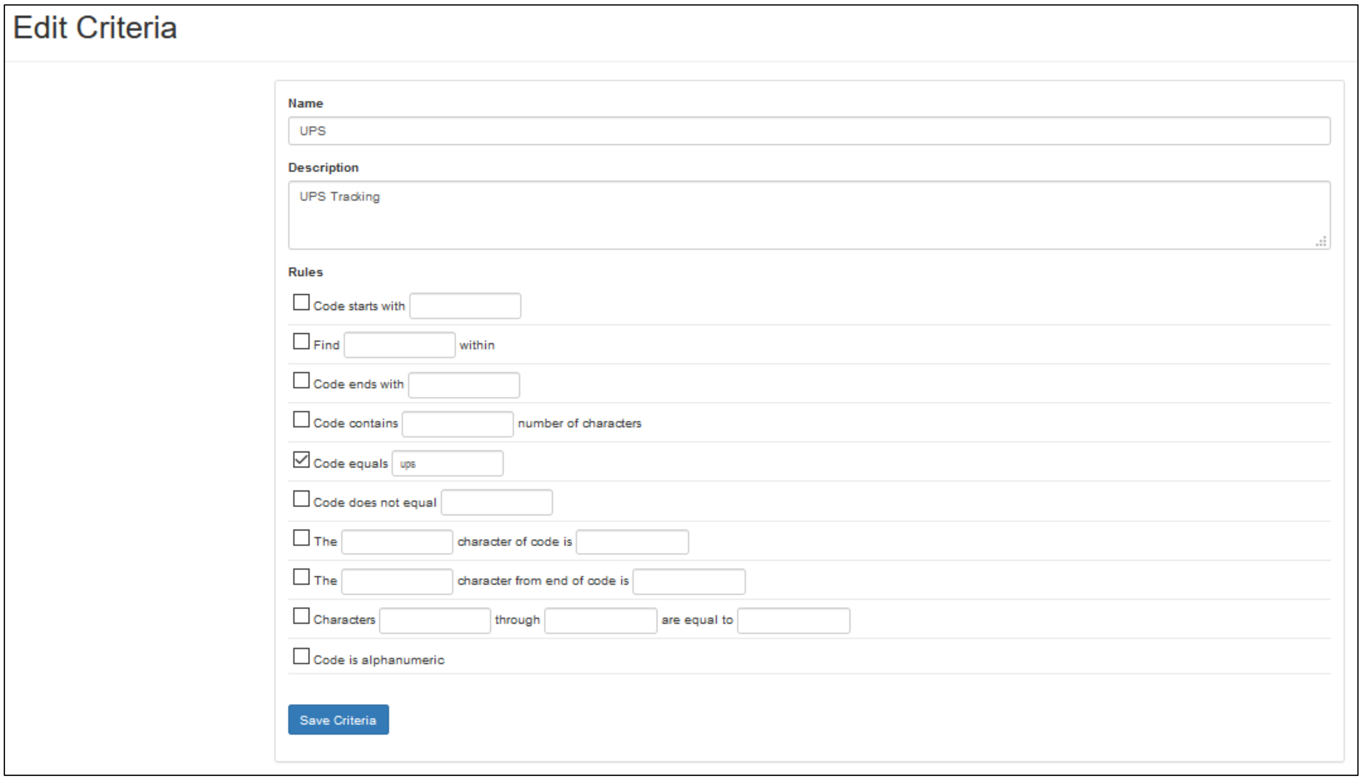
- Name : The name of the criteria
- Description: The description of the criteria
- Rules : One or more rules can be set by selecting the checkbox next to the rule and filling in the rule text

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

© Copy Right All rights reserved

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



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

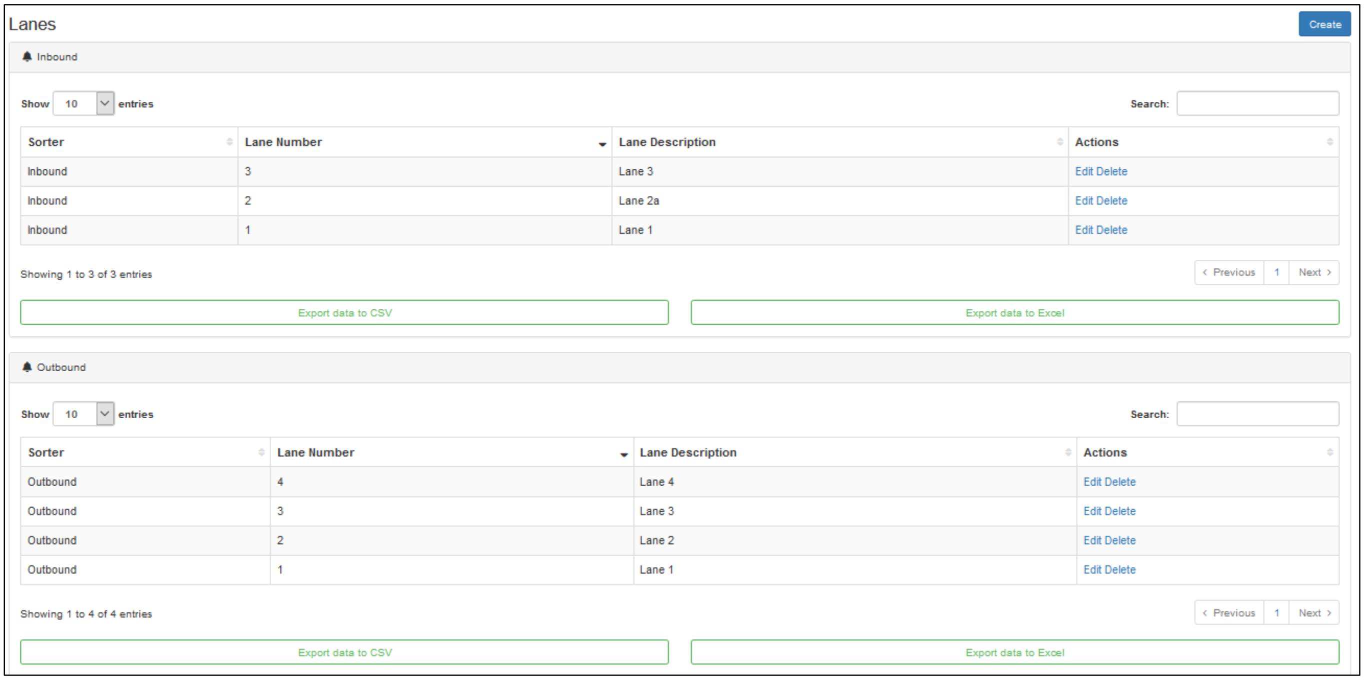
17.1.1.3 Delete

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

© Copy Right All rights reserved

17.1.2 Lanes

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



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

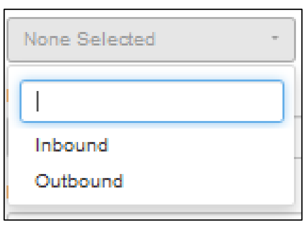
© Copy Right All rights reserved

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

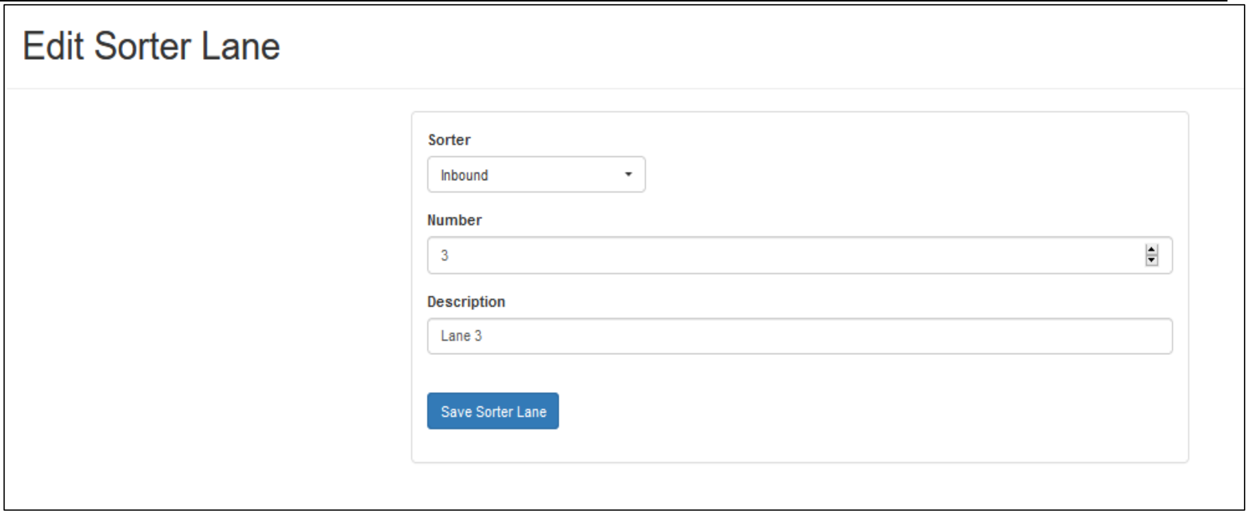
On clicking in 'Create New Sorter Lane' a new 'Inbound' or 'Outbound' lane will be created depending on what was selected in the Sorter dropdown, and the lane will be displayed in the corresponding 'Inbound' or 'Outbound' lane list

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

© Copy Right All rights reserved



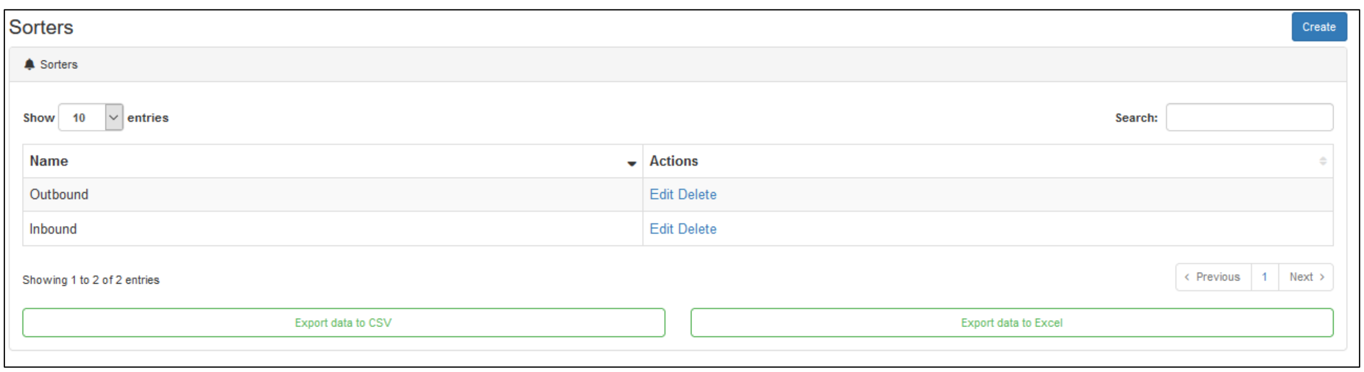
The user can update fields as required and after pressing 'Save Sorter Lane', the changes will be saved

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



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

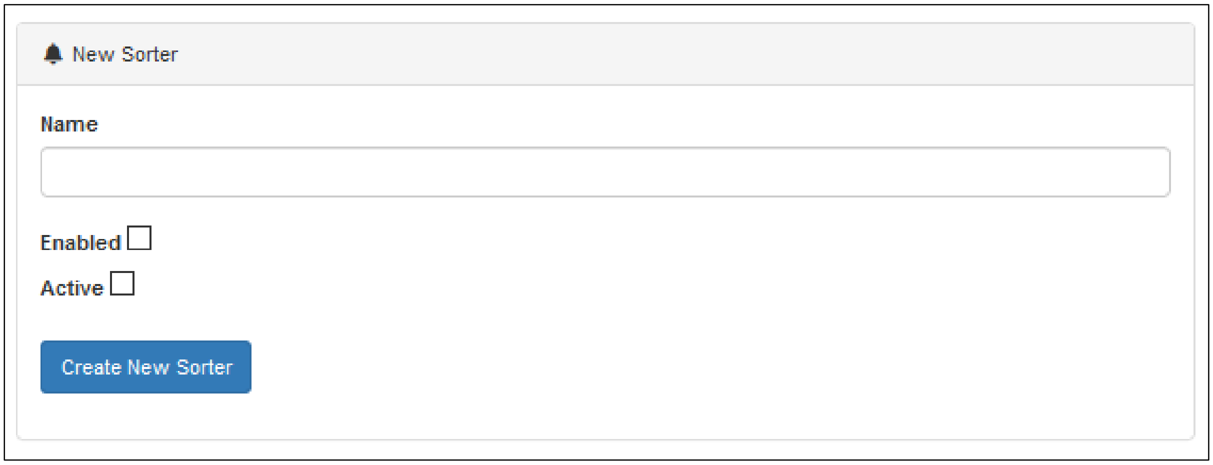
The user can search for sorter using the 'Search' box located at the top right of the list

© Copy Right All rights reserved

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



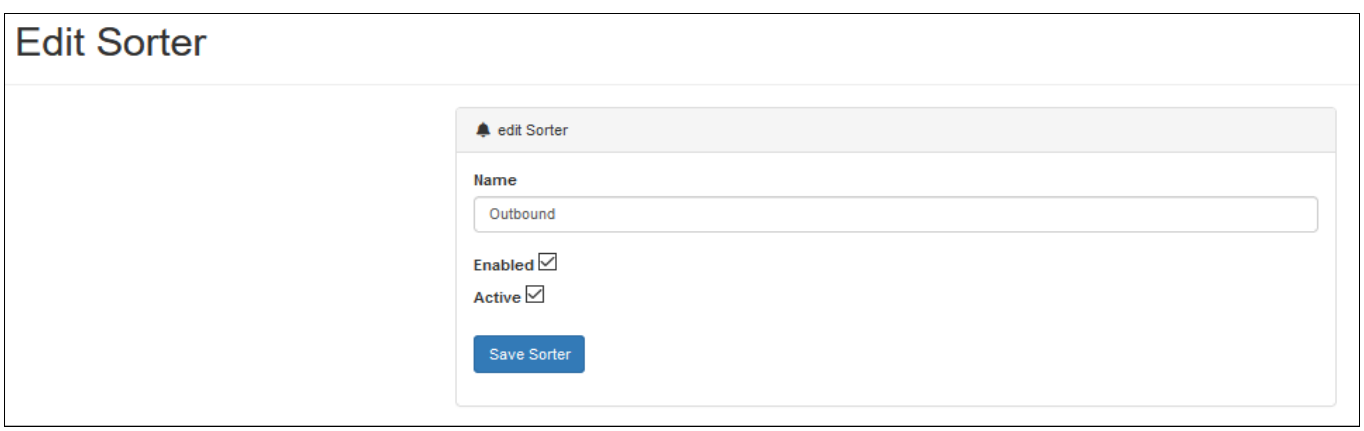
The following fields need to be filled

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

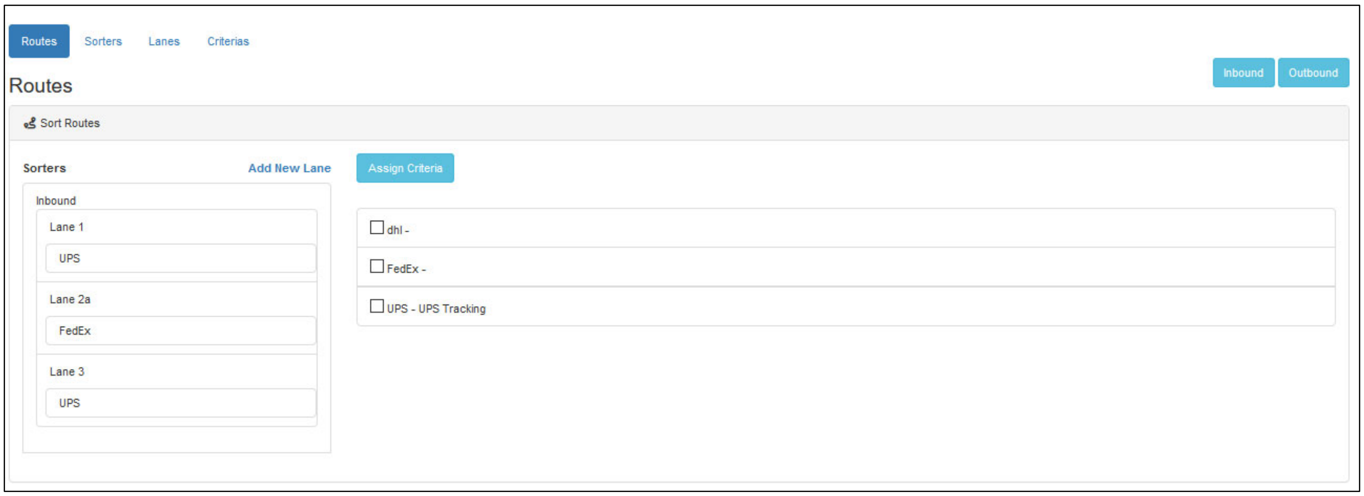
© Copy Right All rights reserved

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



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')

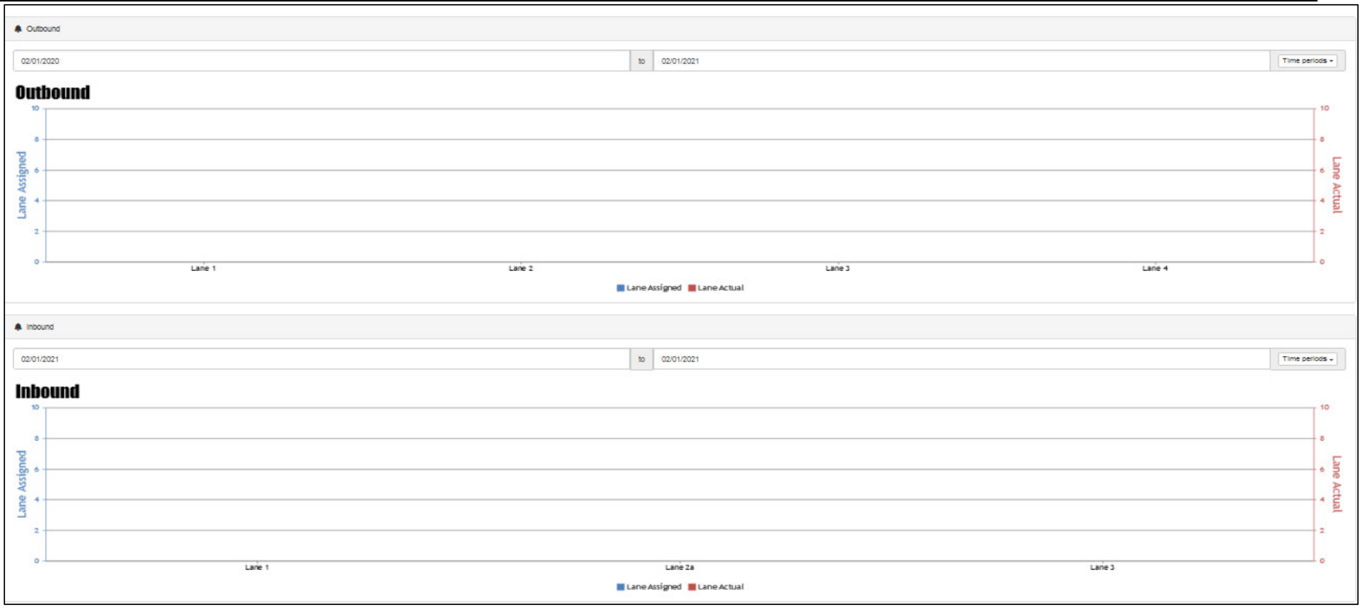
The section on the right hand side shows a list of names of criterias in the system. Select the criterias you want by clicking on the checkbox next to them and then click on 'Assign Criteria', which will assign the criterias to the lanes listed in the section on the left hand side

17.2 Statistics

<u>Sortation</u> > <u>Statistics</u>

The sortation statistics will be shown.

© Copy Right All rights reserved



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

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

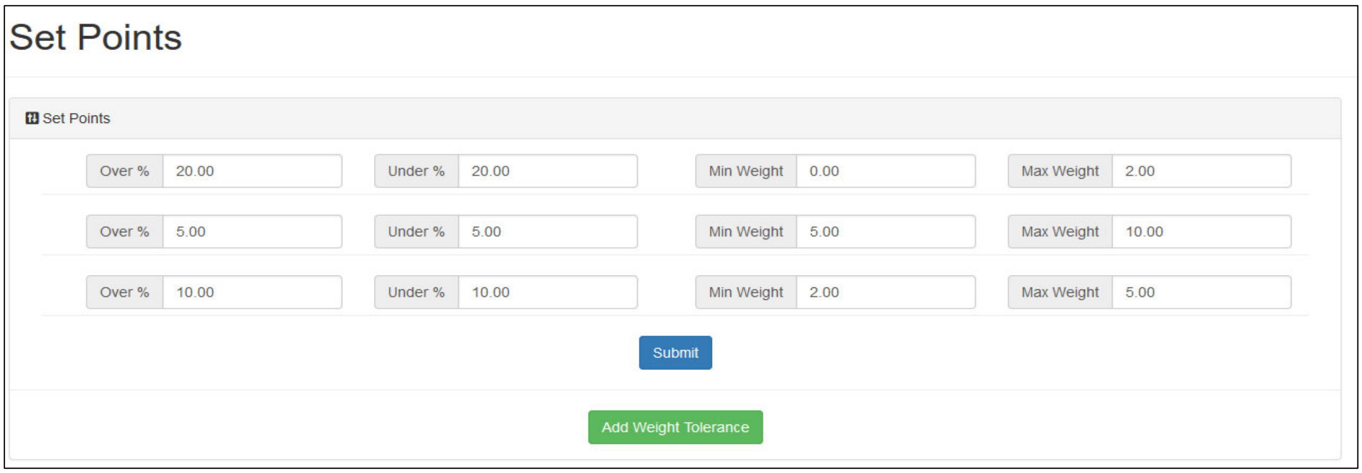
© Copy Right All rights reserved

18 Weight & Dimension

18.1 Set Points

Weight &Dimensions > Set Points

The set points for Weight Tolerance are shown



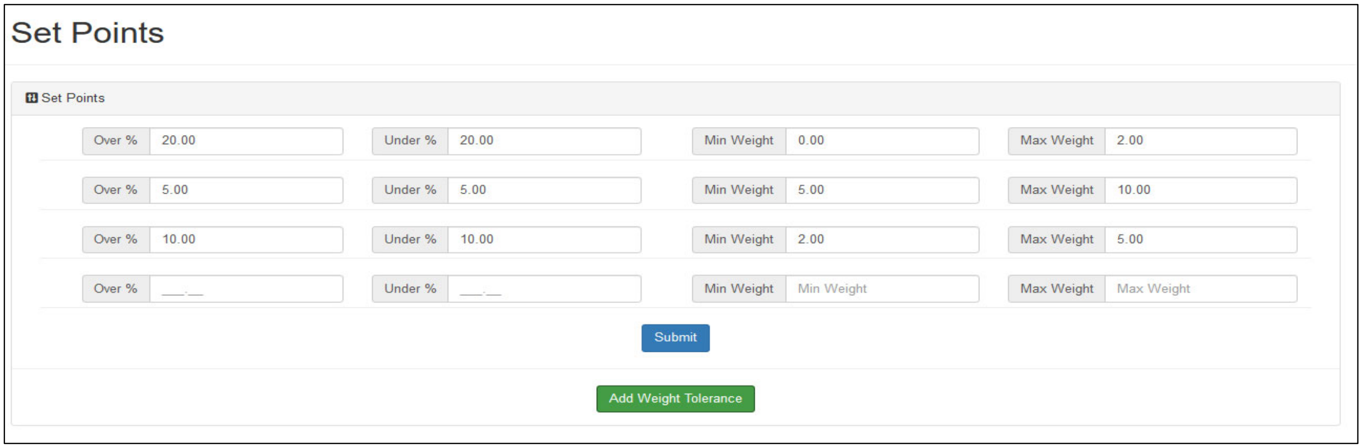
By default, there is one row of (set points) shown. Each row has the following four columns:

- 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.

© Copy Right All rights reserved

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

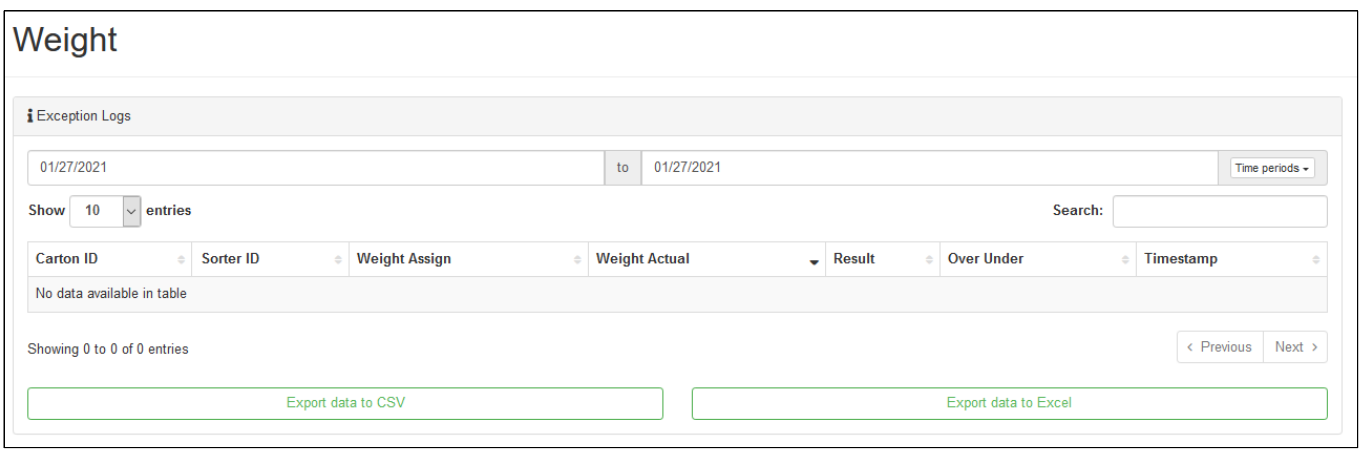


Fill all the four columns 'Over %','under %', 'Min Weight' and 'Max Weight' and press on Submit and the weight tolerance will be added to the system

18.2 Exception Logs

Weight &Dimensions > Exception Logs

The exception logs for weight are shown



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

© Copy Right All rights reserved

- 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

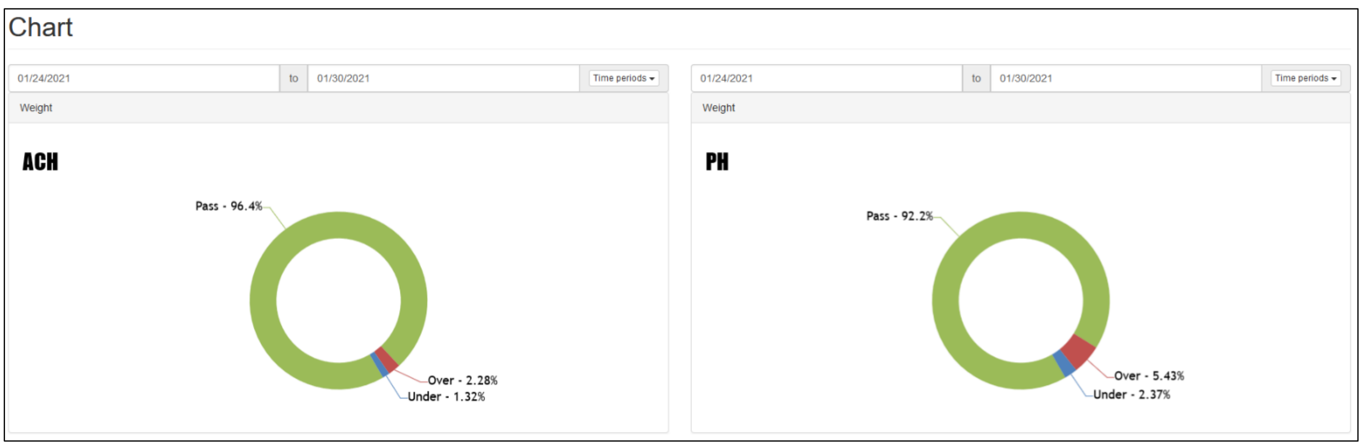
The user can search for exception log using the 'Search' box located at the top right of the list

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.)

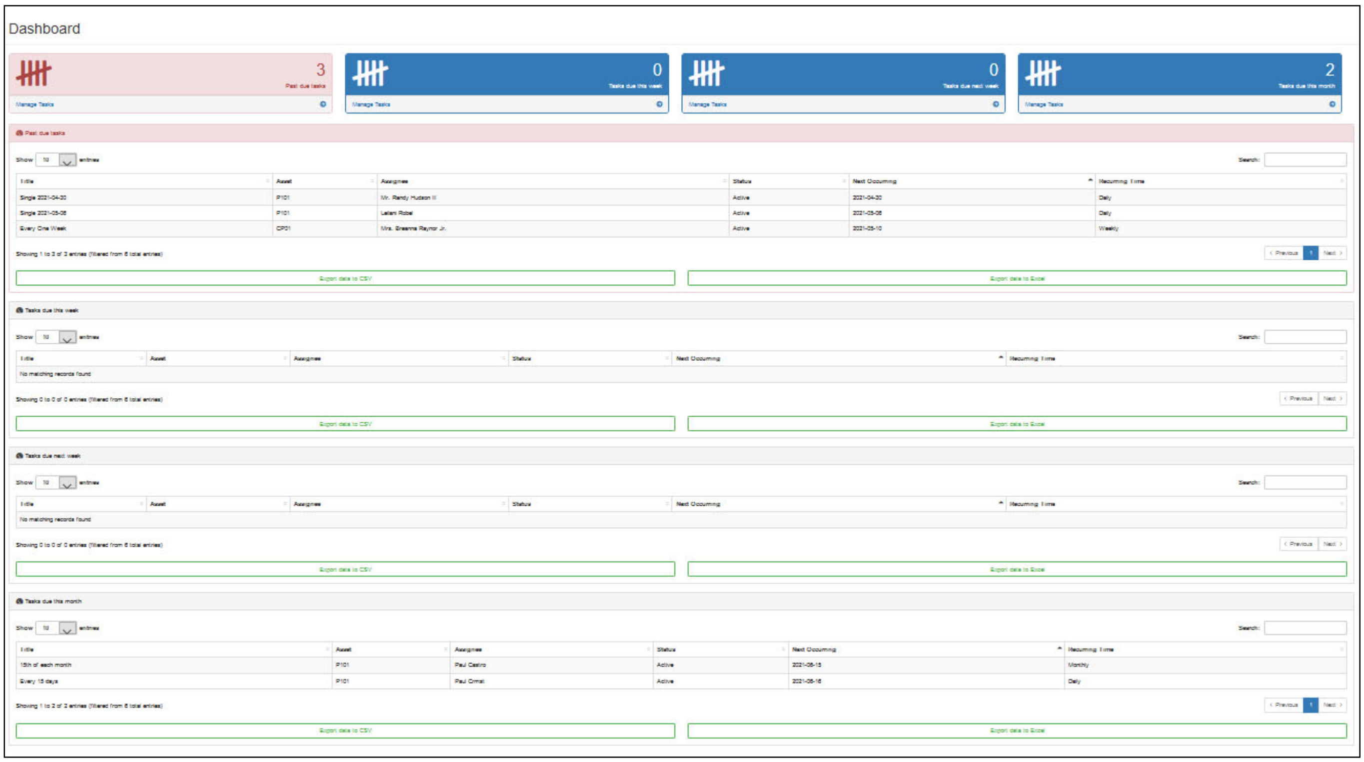
© Copy Right All rights reserved

19 CMMS

19.1 Dashboard

CMMS > Dashboard

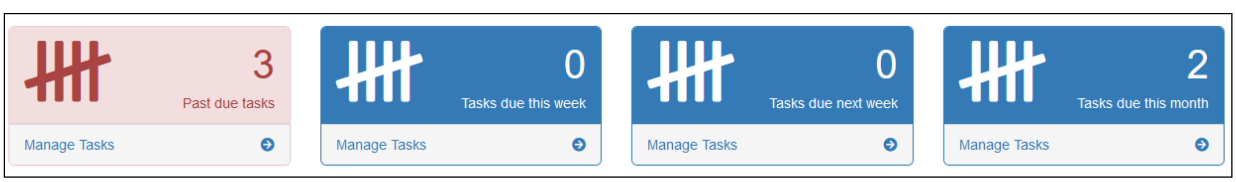
The landing page will be shown as below



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



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

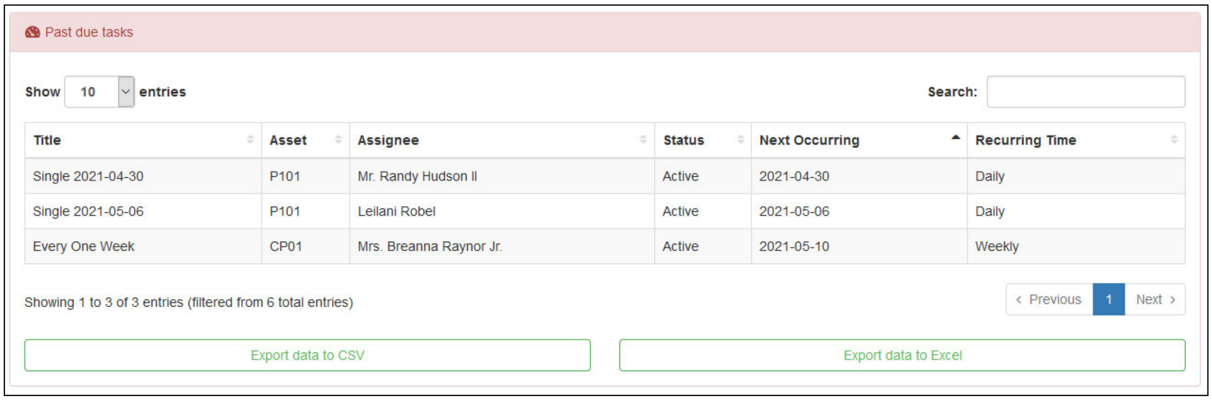
© Copy Right All rights reserved

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



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

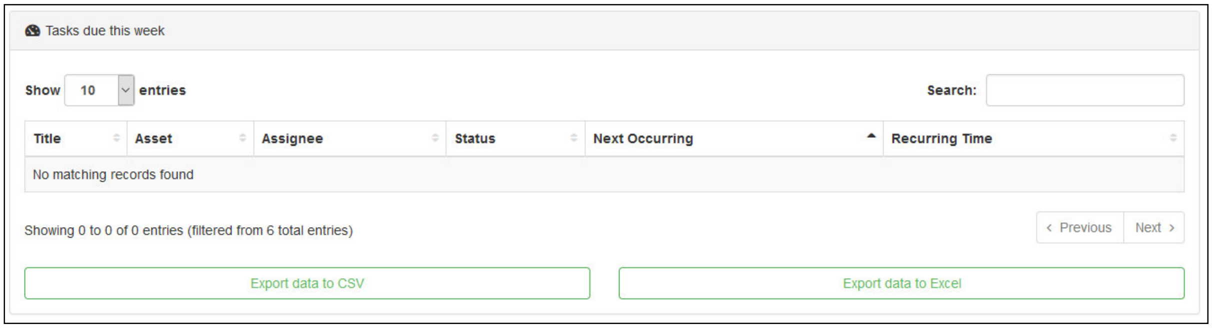
The past due tasks list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

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

© Copy Right All rights reserved

19.1.3 Tasks due this week section

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



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

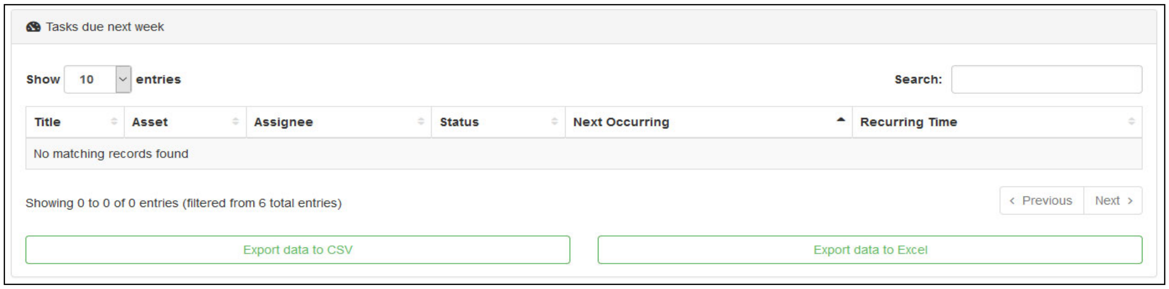
The tasks due this week list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

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

© Copy Right All rights reserved

19.1.4 Tasks due next week section

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



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

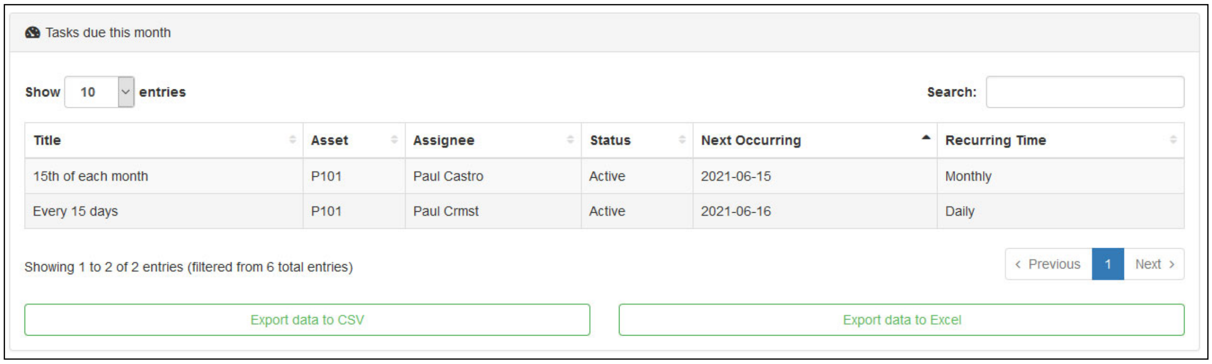
The tasks due next week list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

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

© Copy Right All rights reserved

19.1.5 Tasks due this month section

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



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

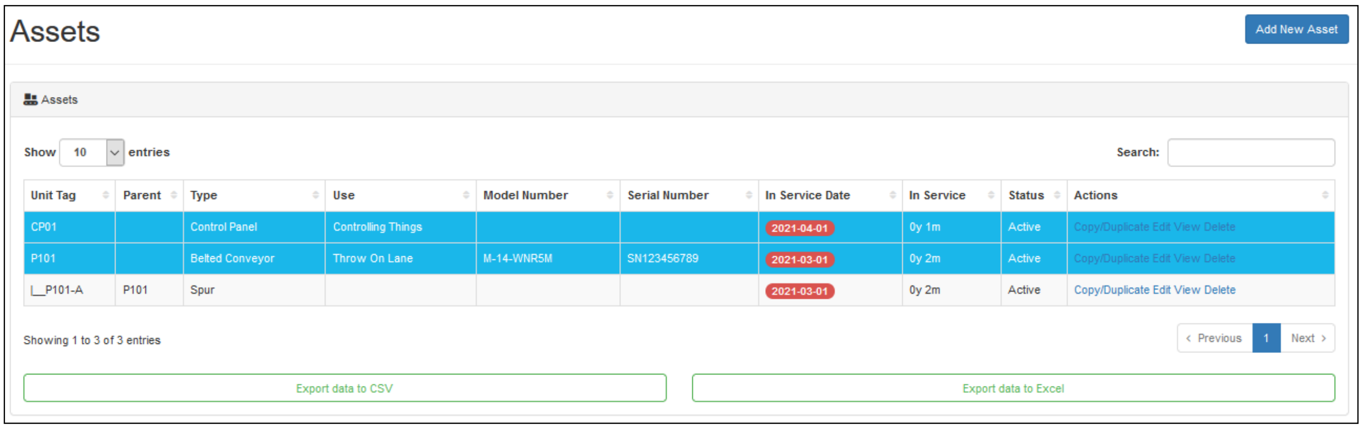
© Copy Right All rights reserved

19.2 Assets

CMMS > Assets

19.2.1 Assets List

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



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

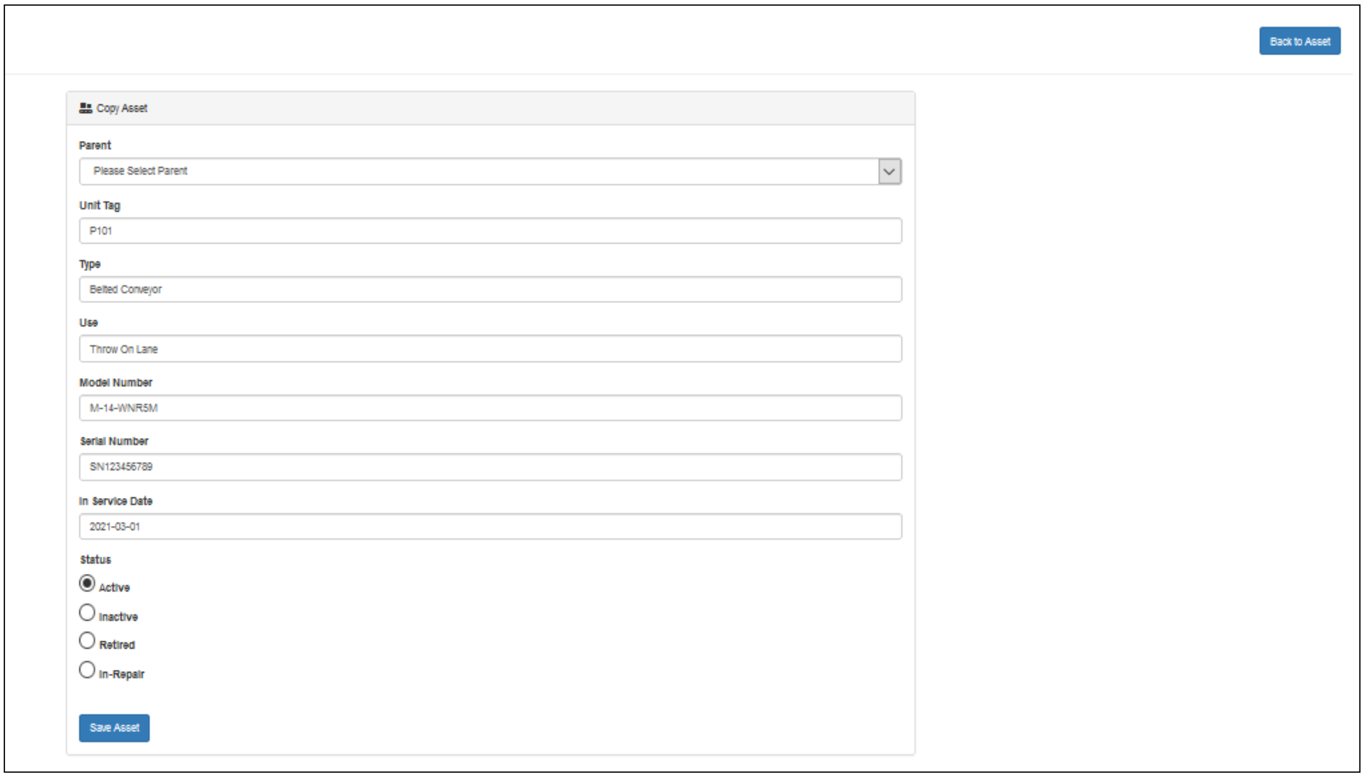
© Copy Right All rights reserved

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.

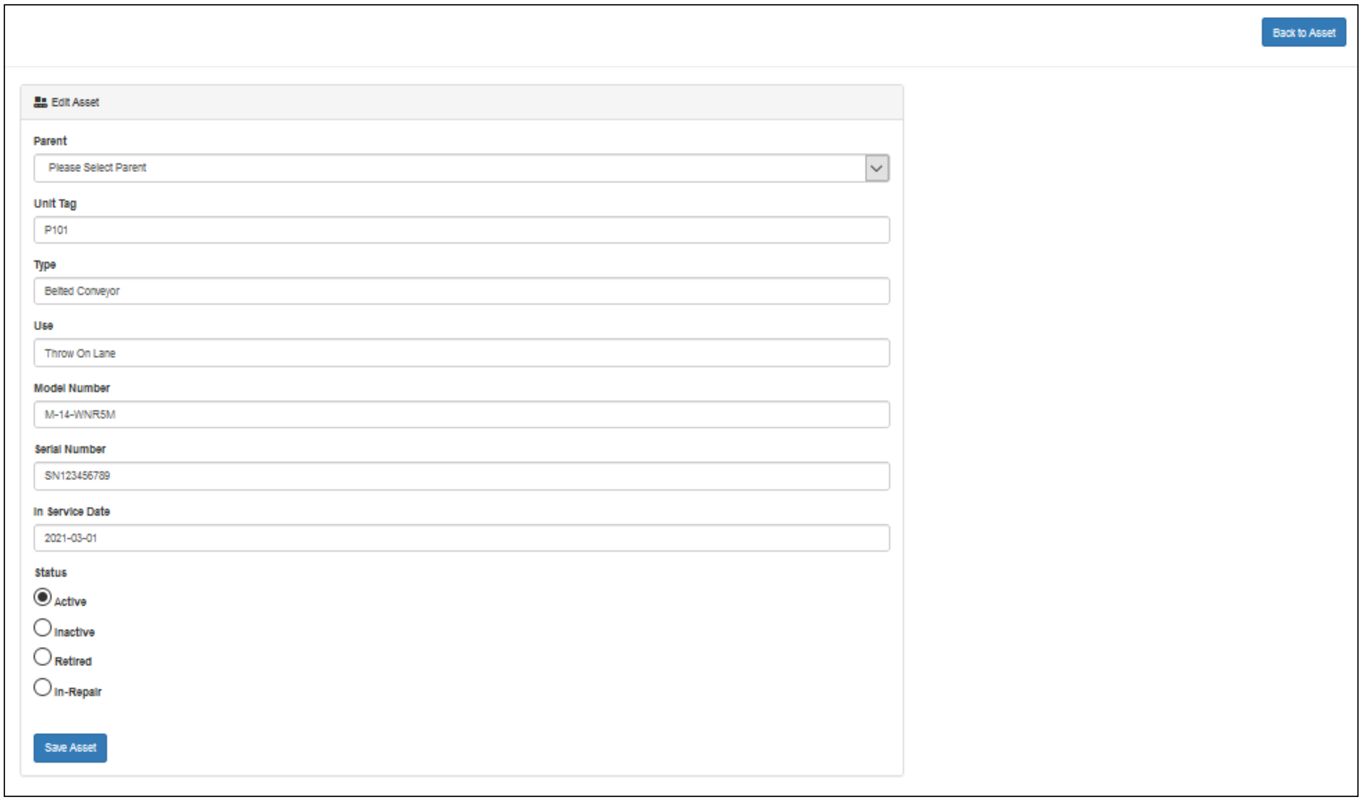
Note: The unit tag of the new asset has to be different from the original asset else a 'Duplicate' error will result

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

© Copy Right All rights reserved

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



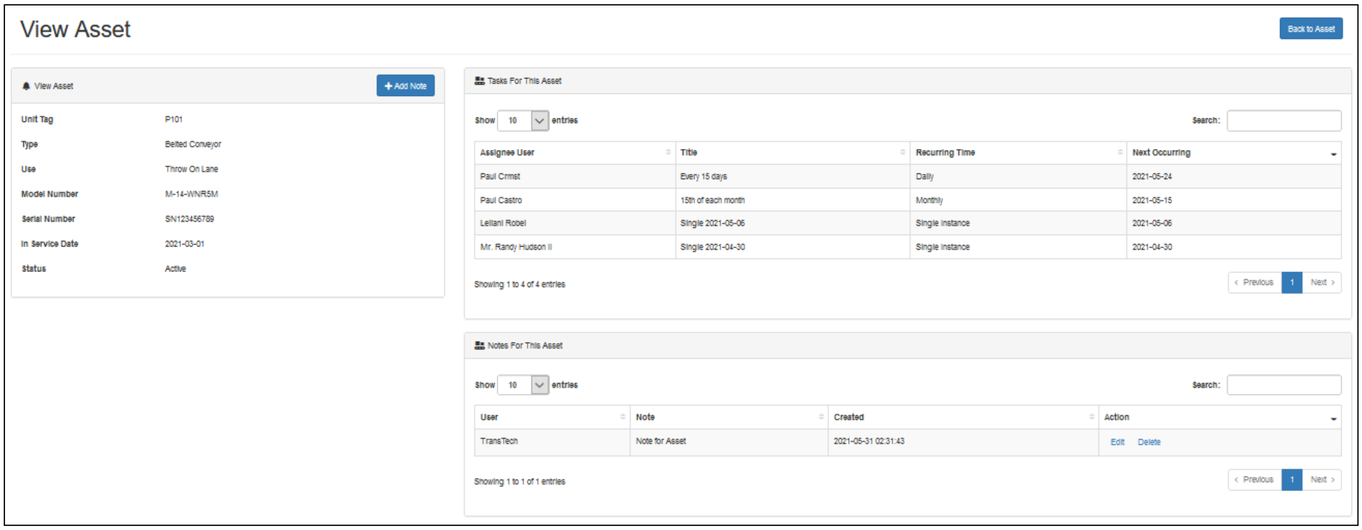
The user can update the values of the fields as required and then pressing on 'Save Asset' will save the changes

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

© Copy Right All rights reserved

19.2.2.3 View

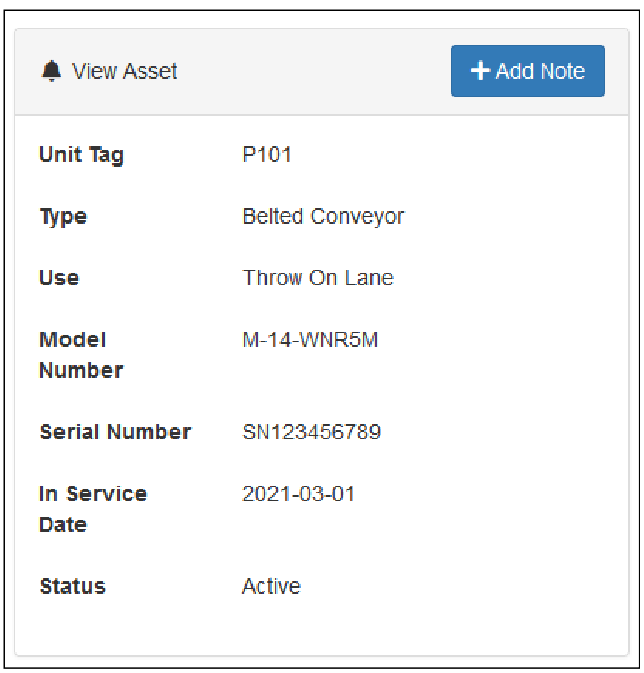
This action allows user to view an asset. Clicking on this option for an asset brings up the View Asset screen



This has three sections as below

19.2.2.3.1 View Asset Section

This section shows asset details as shown below



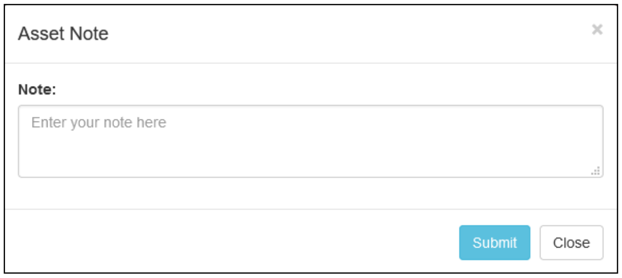
The following information is shown

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

© Copy Right All rights reserved

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

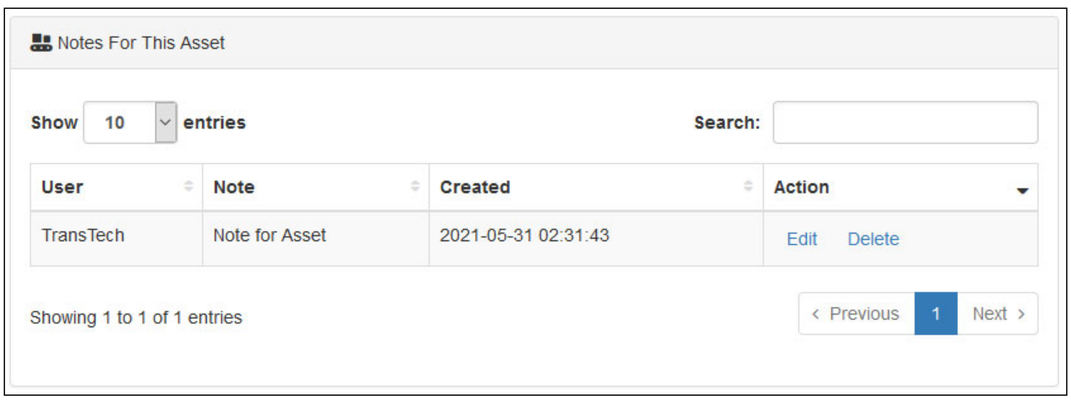
Notes can also be added for the asset clicking on the 'Add Note' button. This brings up the following pop-up screen



The 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 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

© Copy Right All rights reserved

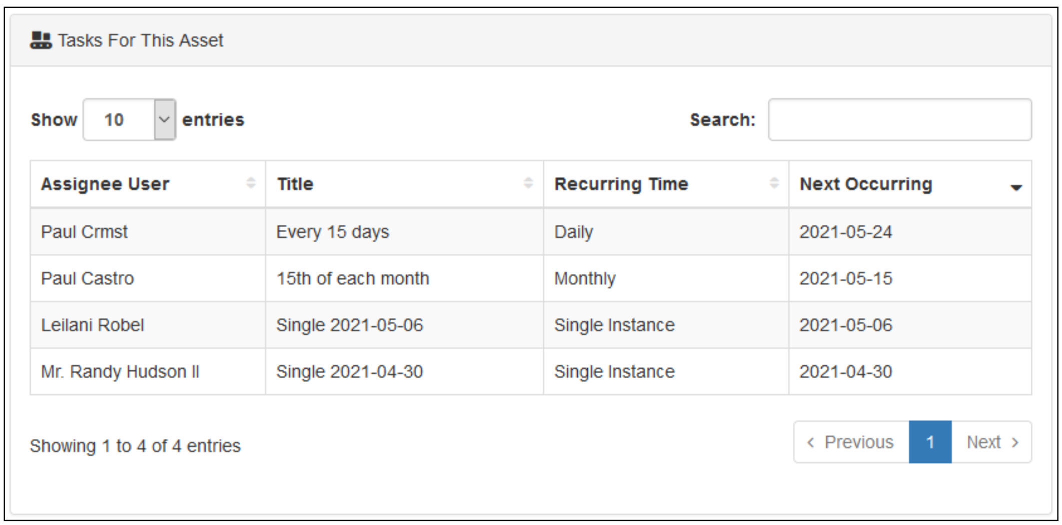
After modifying the note text as desired, press on the 'Submit' to save the changes and close the pop-up, while pressing on the 'Close' button will close the pop-up without saving the changes

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



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

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

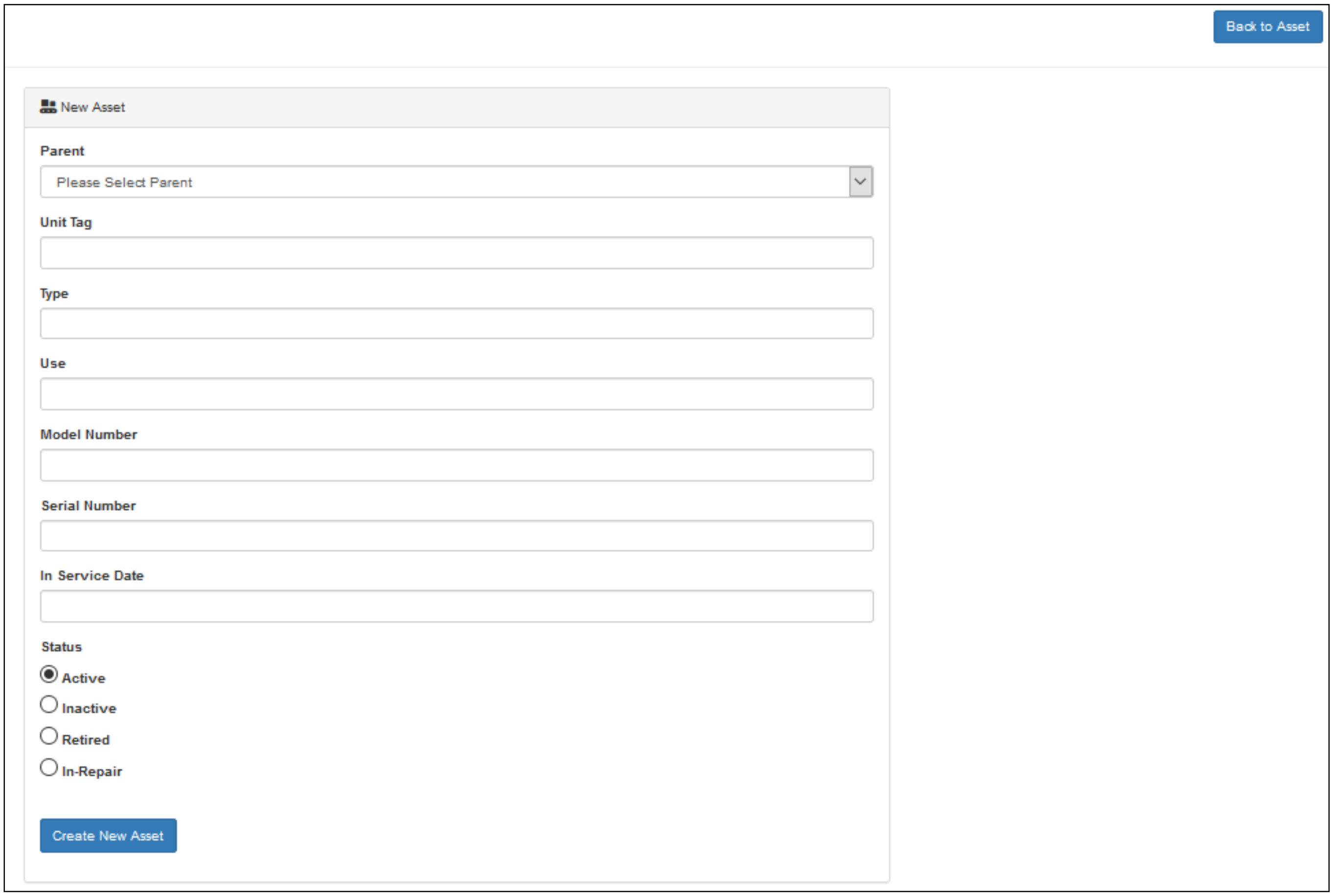
© Copy Right All rights reserved

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

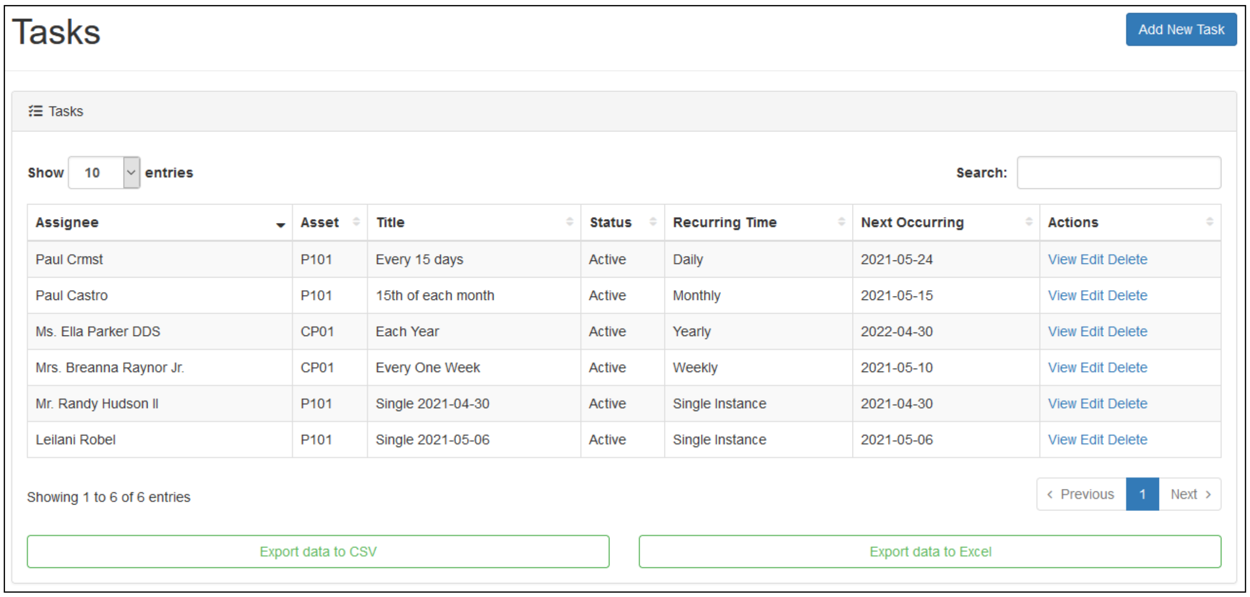
© Copy Right All rights reserved

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

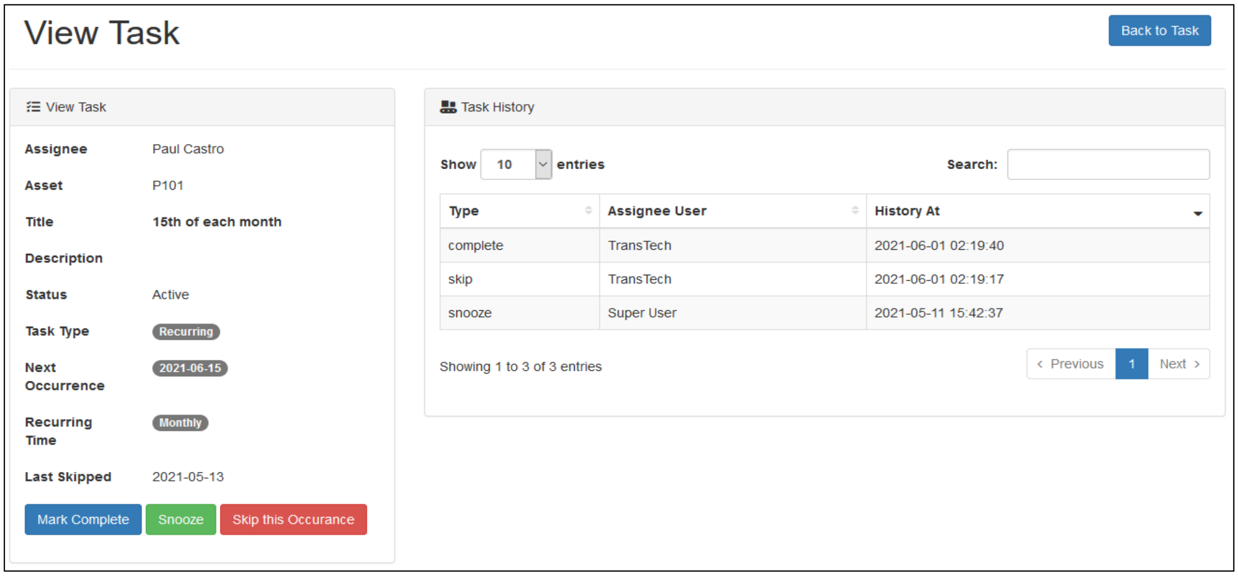
© Copy Right All rights reserved

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

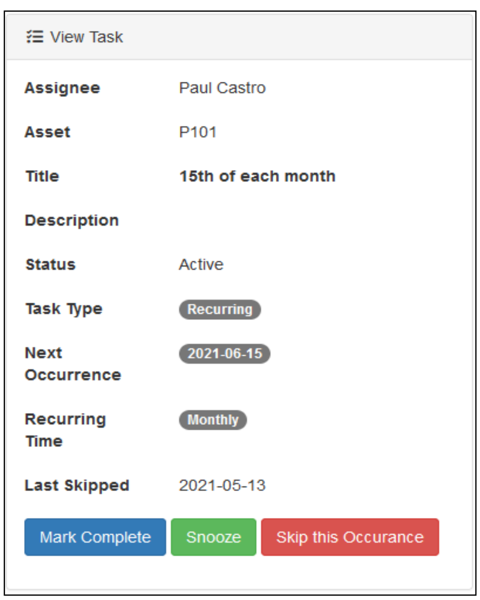
This action allows user to view a task. Clicking on this option for a task brings up the View Task screen



This has two sections as below

19.3.2.1.1 View Task Section

This section shows task details as shown below



The following information is shown

© Copy Right All rights reserved

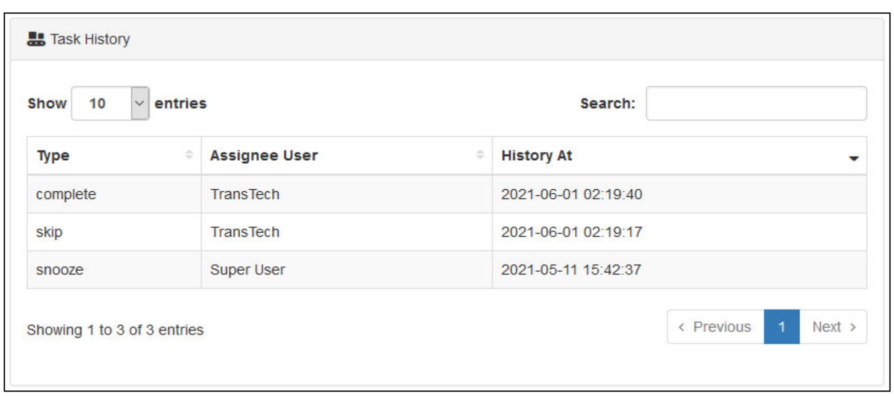
- Assignee: The person to whom the task is assigned
- Asset: The unit tag of the asset
- Title: The title of the task
- Description: The description of the task
- Task Type: The type of the task – 'Recurring' or 'Single Instance'
- Next Occurrence: The date of next occurrence of the task
- Recurring 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 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



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

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

© Copy Right All rights reserved

- 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

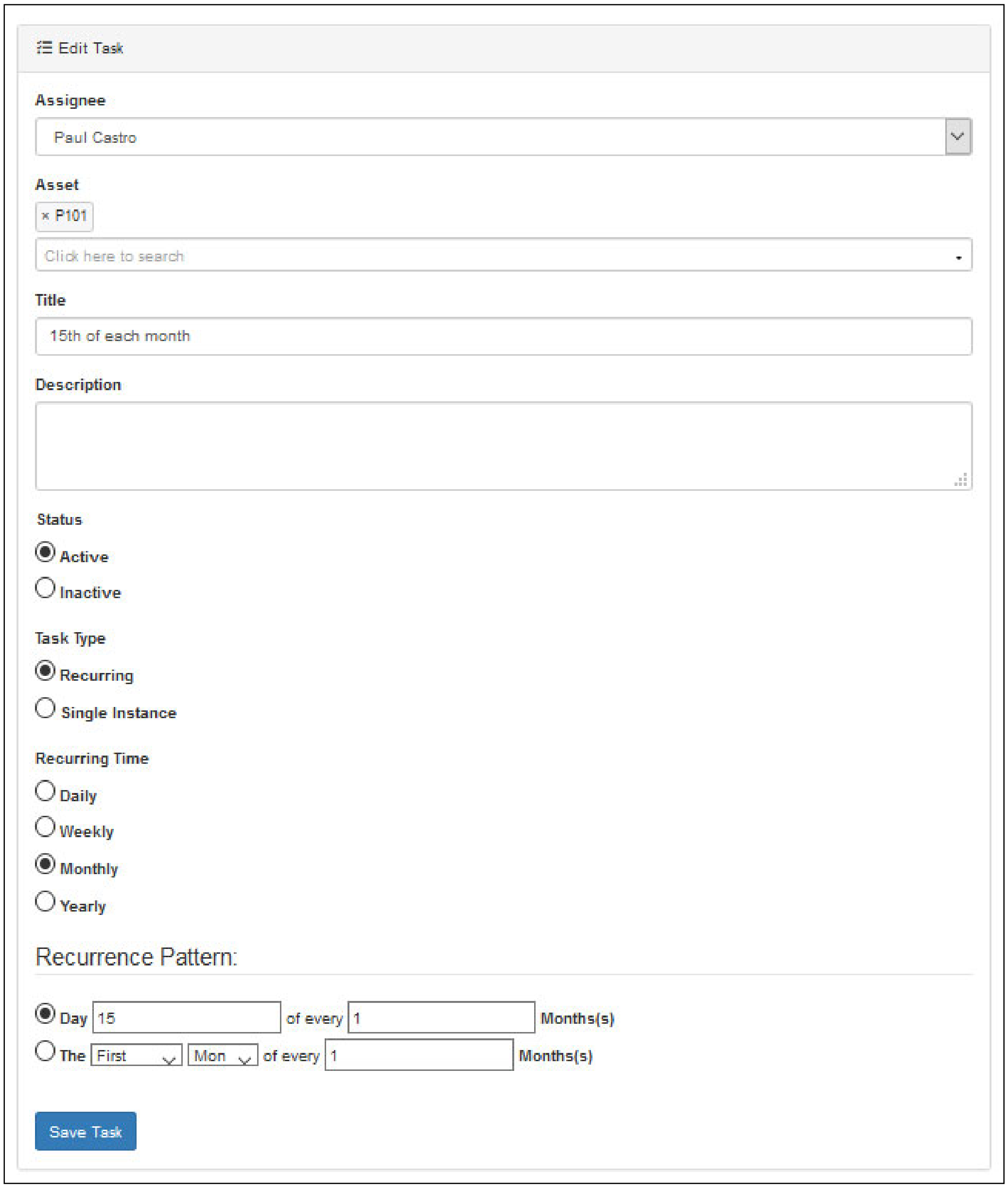
The history list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

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

© Copy Right All rights reserved

19.3.2.2 Edit

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



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

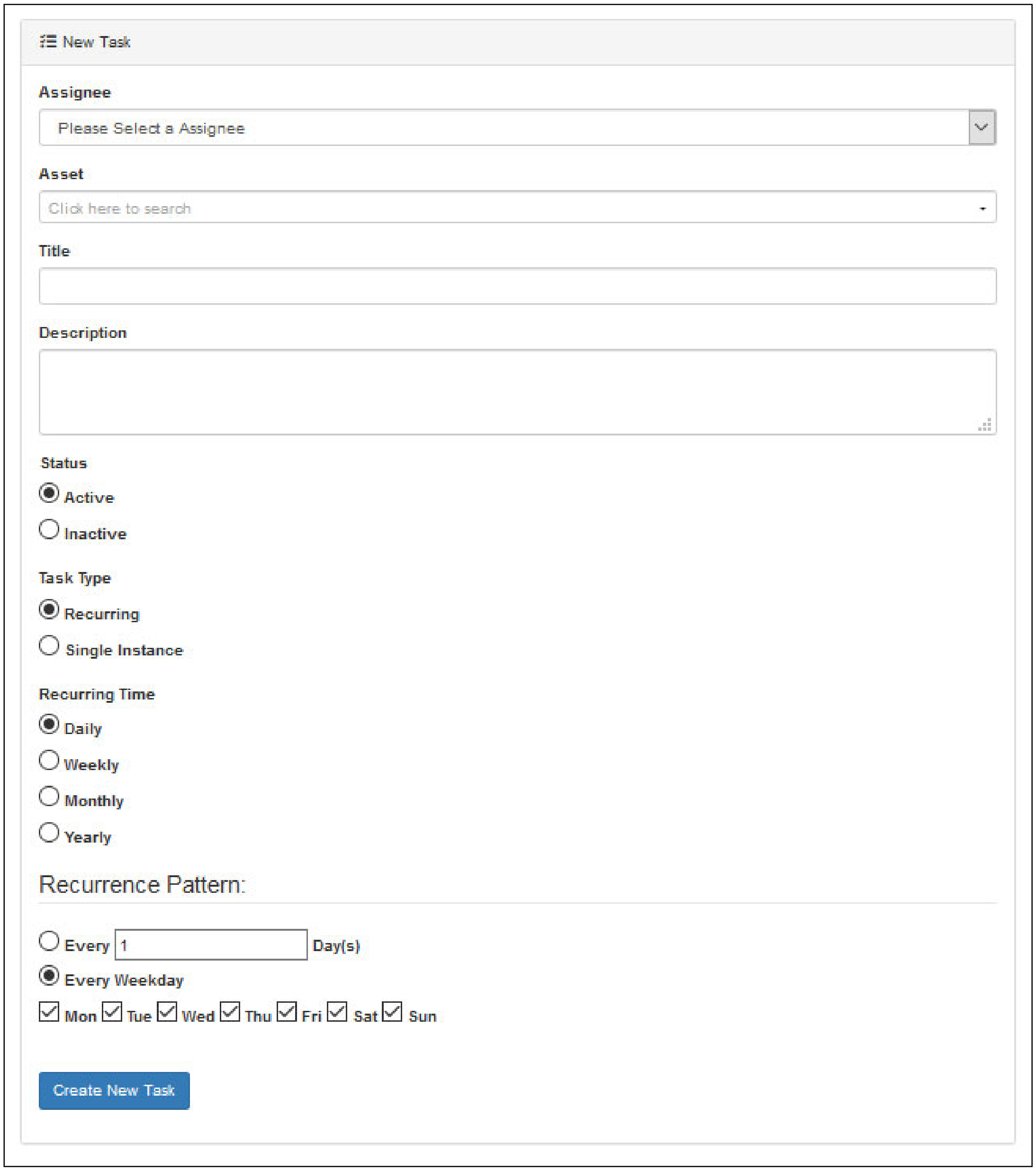
19.3.2.3 Delete Task

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

© Copy Right All rights reserved

19.3.3 Add New Task

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

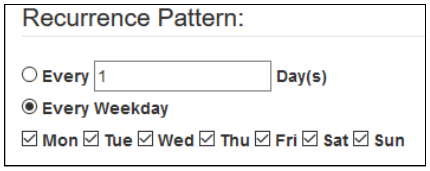


The following fields can be added for a task

- 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'

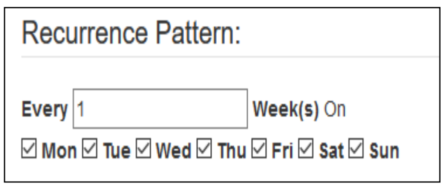
© Copy Right All rights reserved

- 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



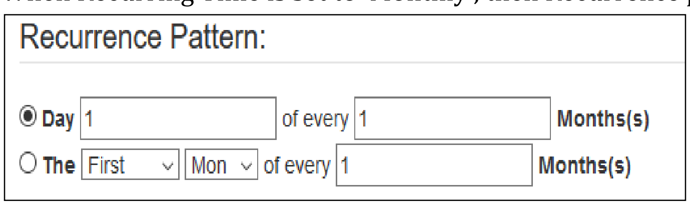
      The default is ‘Every Weekday’ with all days of week selected. The user can remove the days of week not required. Or the user can select the ‘Every x number of Day(s)’ where default value of x is 1 which means every day

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

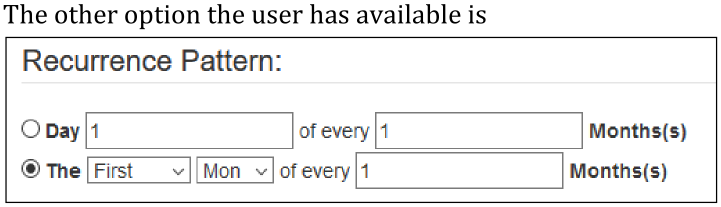


      The default is ‘Every 1 Week’ on all days of week. The user can remove the days of week not required. Also the user can change the recurrence to be once every ‘x’ number of weeks (where x is integer) instead of every week for the days of week selected

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



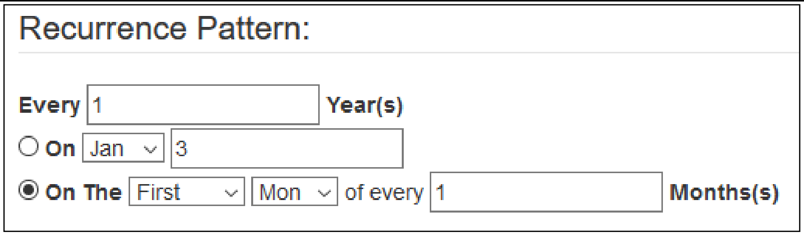
      The default is on Day 1 of every Month. The user can change to day of month desired and also whether recurrence will take place every month or once every ‘x’ number of months (where x is integer)
      The other option the user has available is



      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

© Copy Right All rights reserved



Here there can be two options

a) 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)
b) 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

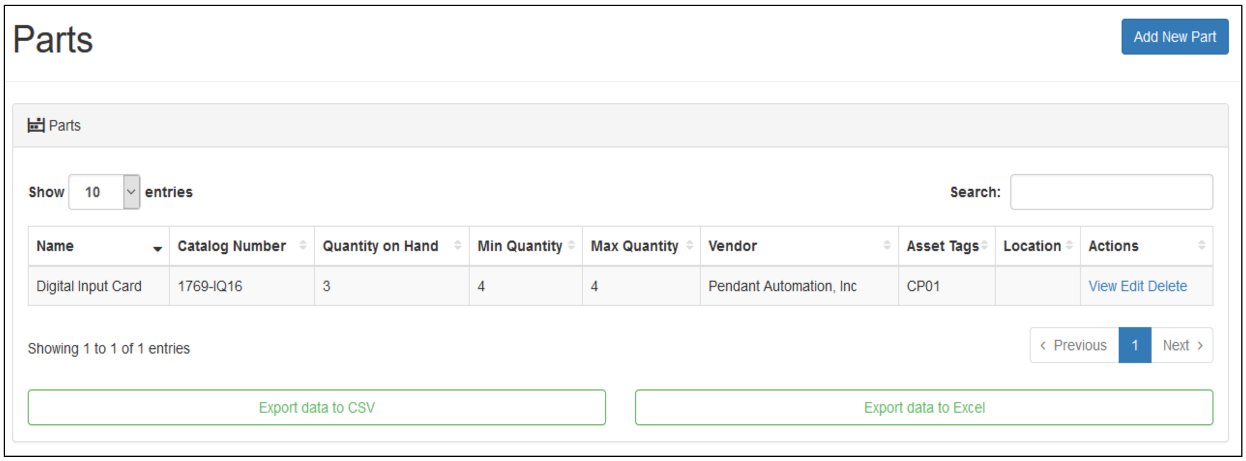
© Copy Right All rights reserved

19.4 Parts

CMMS > Parts

19.4.1 Parts List

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



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

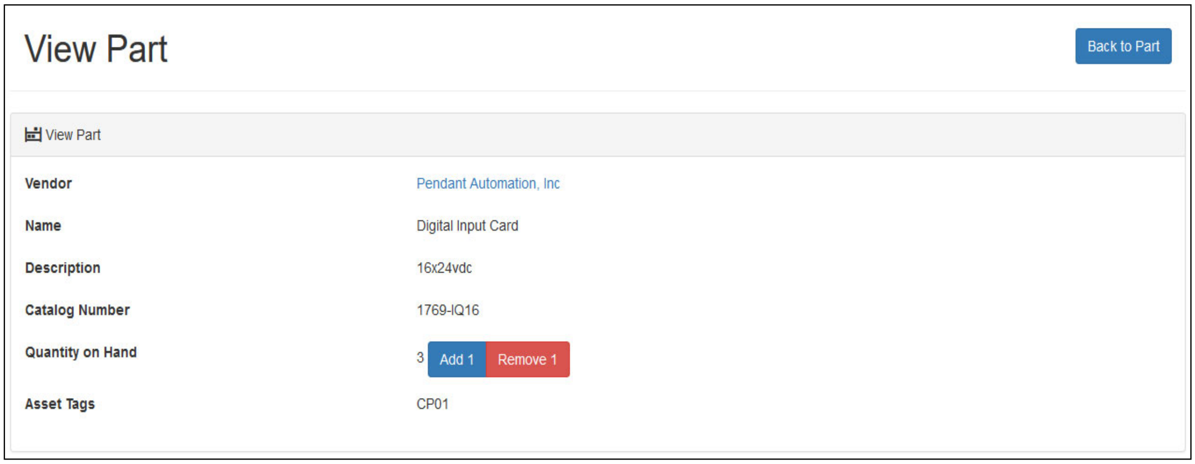
The list of parts currently in the system can be exported in CSV format or to Excel by pressing the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

© Copy Right All rights reserved

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



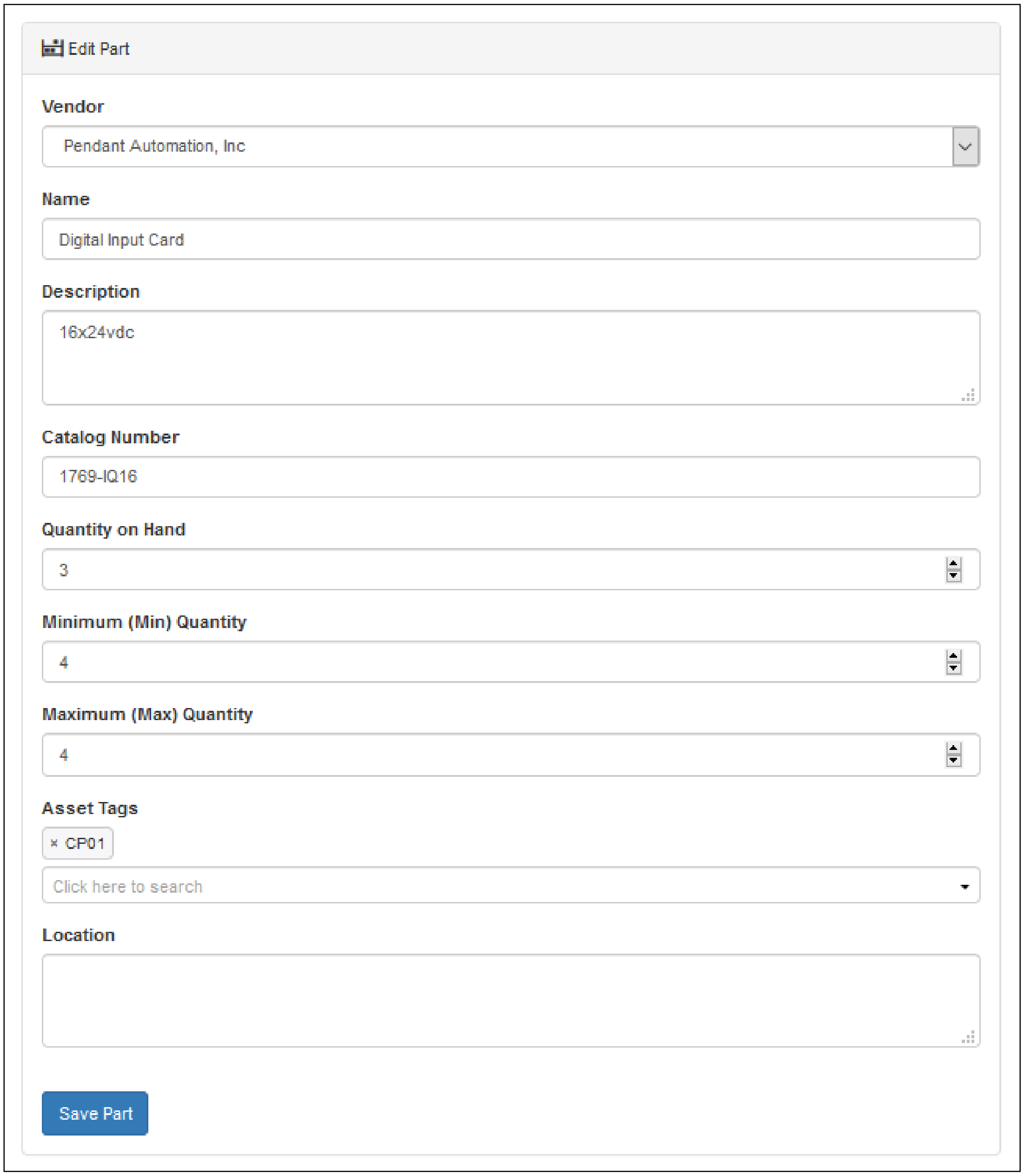
The details of the part are displayed. The ‘Quantity on Hand’ can be increased by pressing on the ‘Add 1’ button. Pressing on ‘Add 1’ button increases the quantity by 1 (each click will increase quantity by one). Similarly the ‘Quantity on Hand’ can be decreased by pressing on the ‘Remove 1’ button which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

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

© Copy Right All rights reserved

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

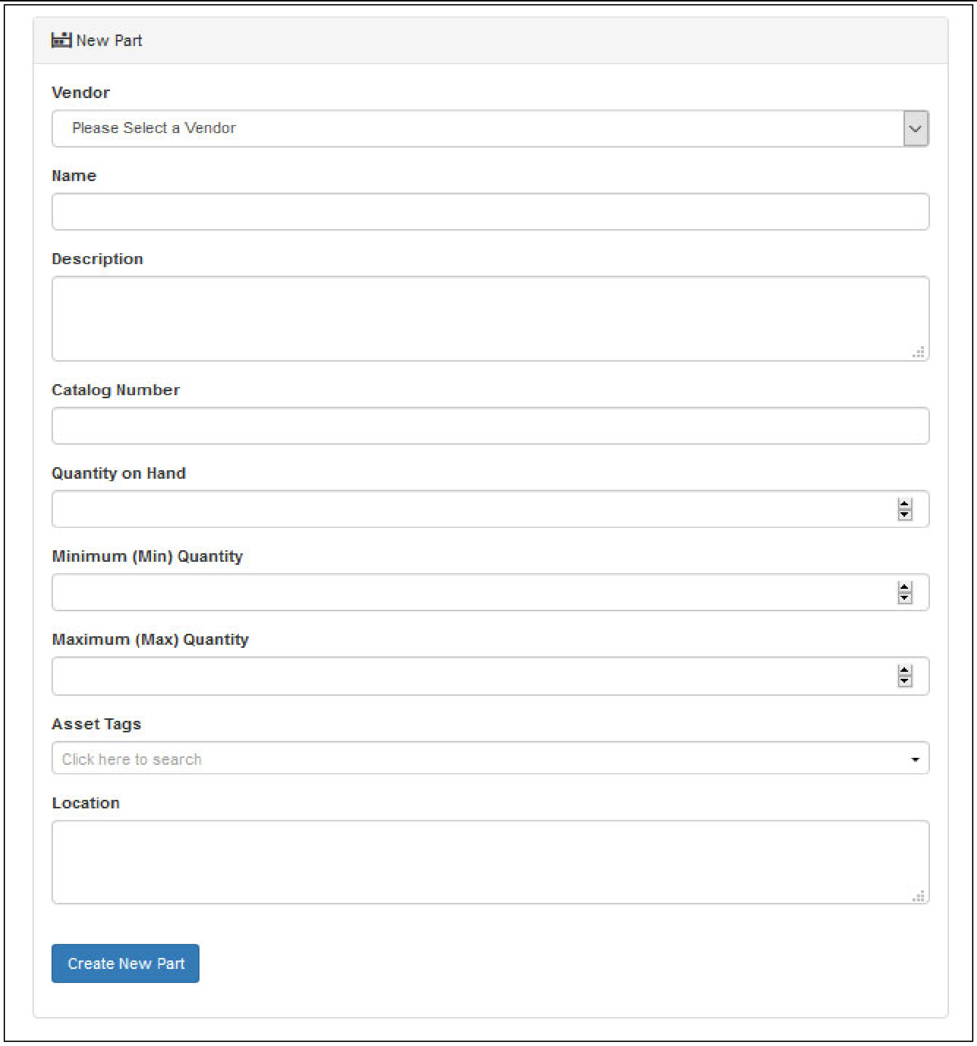
19.4.2.3 Delete

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

© Copy Right All rights reserved



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

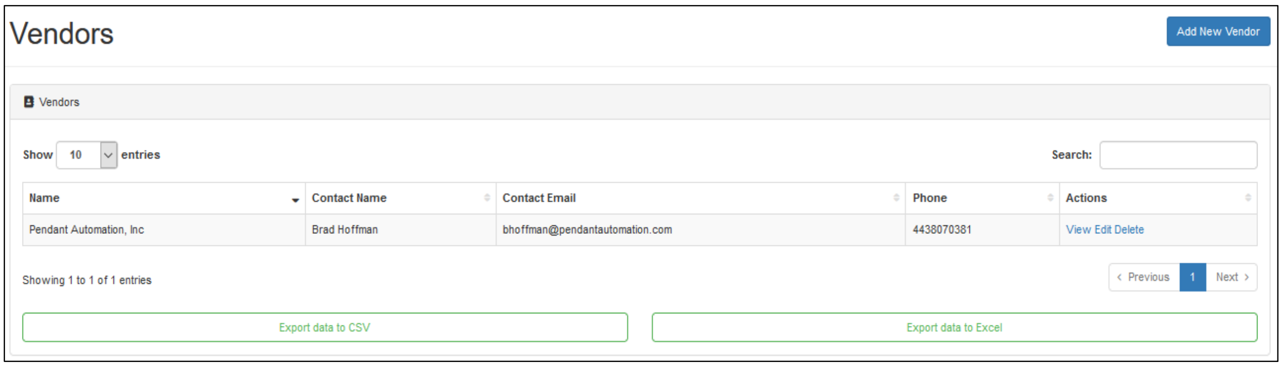
© Copy Right All rights reserved

19.5 Vendor

CMMS > Vendor

19.5.1 Vendors List

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



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

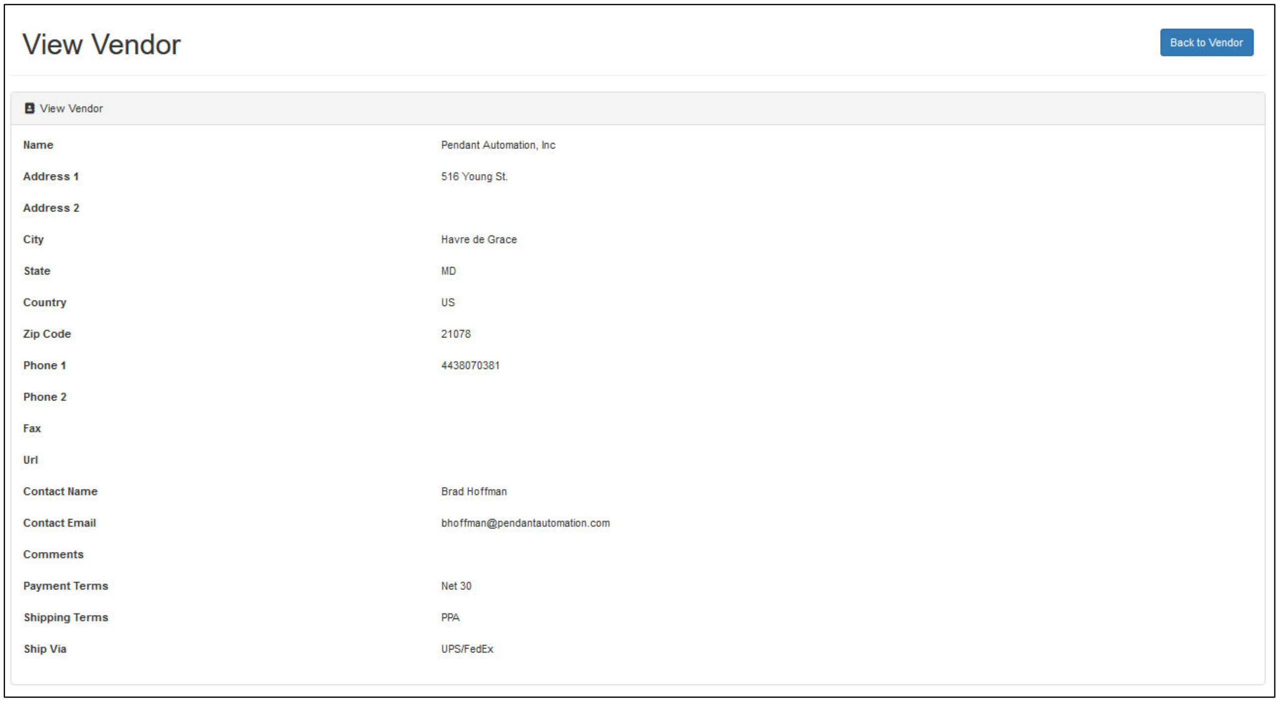
The list of vendors currently in the system can be exported in CSV format or to Excel by pressing the ‘Export data to CSV’ and ‘Export data to Excel’ respectively

© Copy Right All rights reserved

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



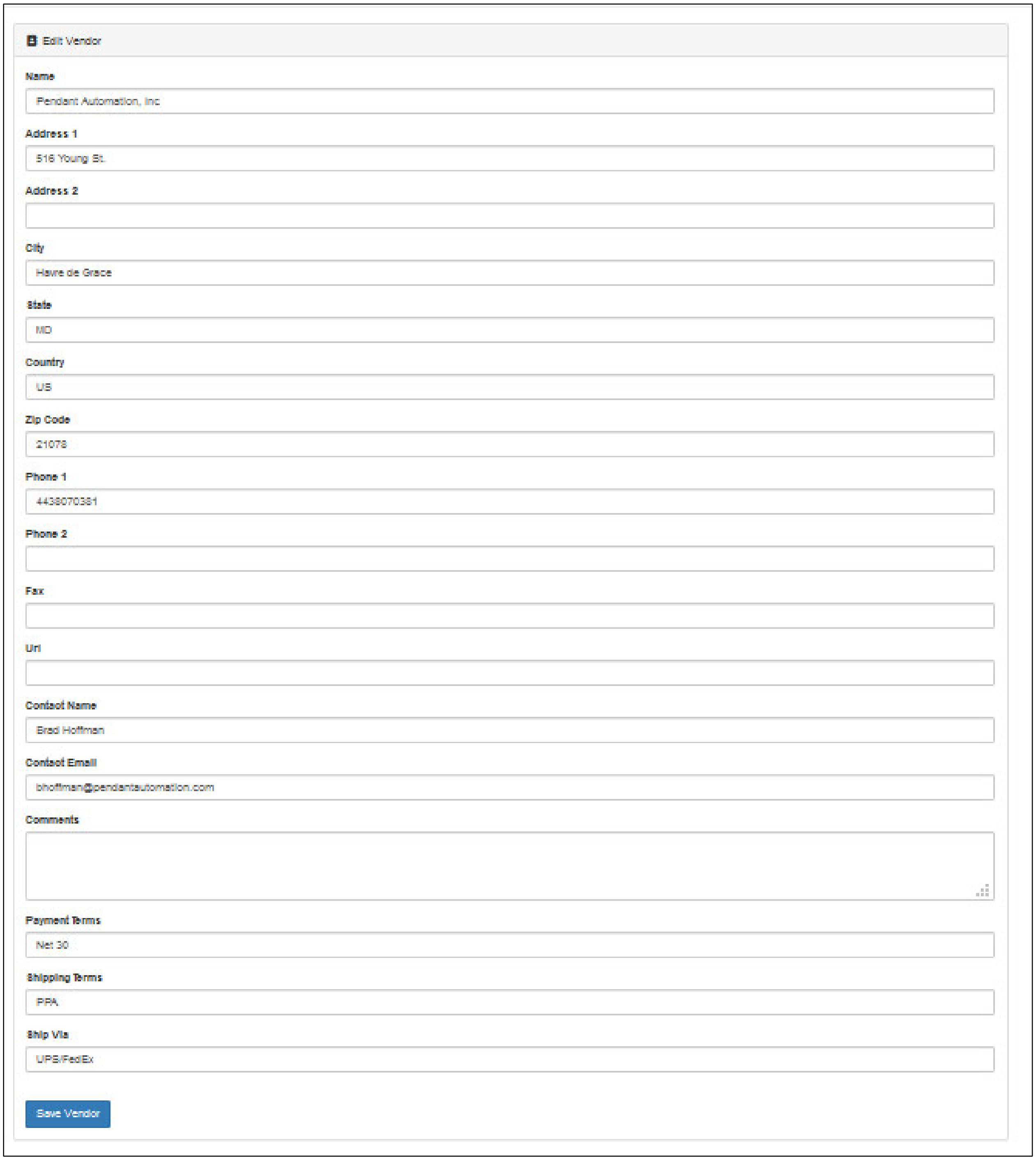
The details of the vendor are displayed

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

© Copy Right All rights reserved

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



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

© Copy Right All rights reserved

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

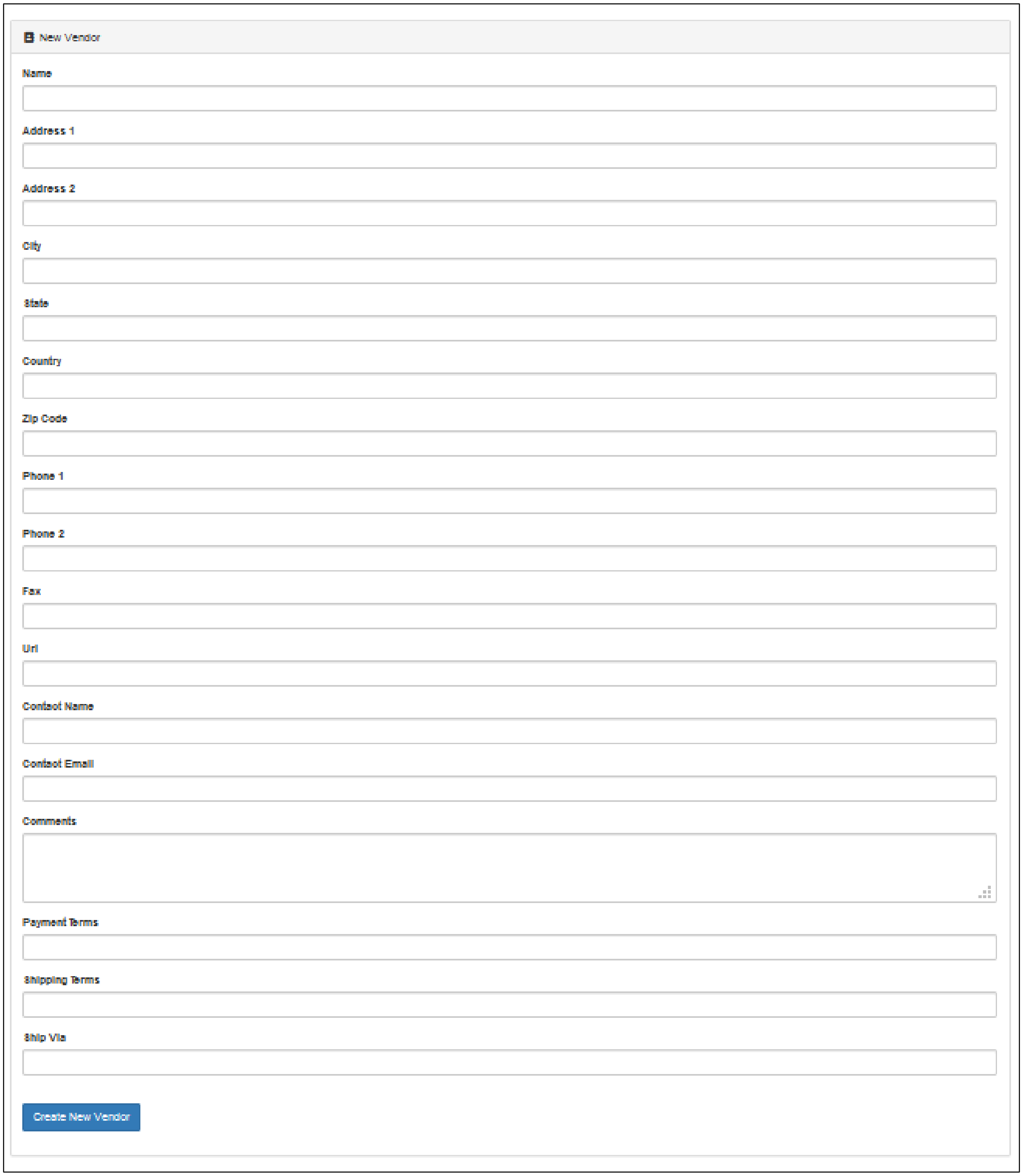
19.5.2.3 Delete

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

© Copy Right All rights reserved

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



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

© Copy Right All rights reserved

- 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 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

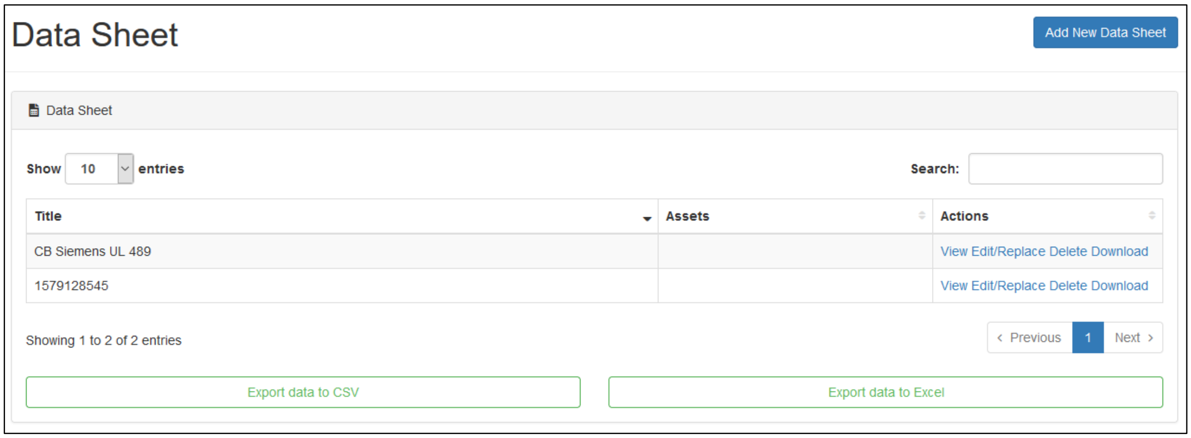
© Copy Right All rights reserved

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



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

© Copy Right All rights reserved

19.6.2 Actions

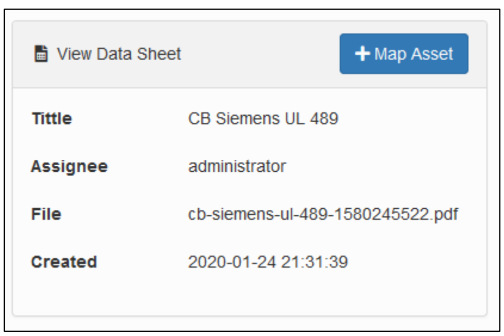
19.6.2.1 View

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



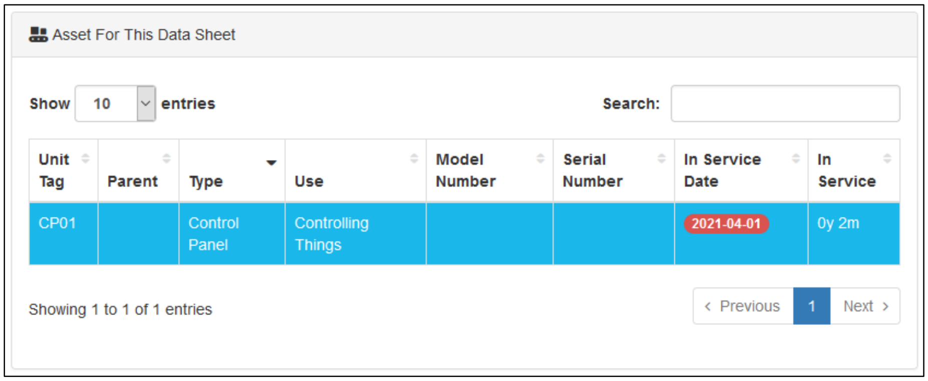
The Title, Assignee, File uploaded and Created date time stamp are shown. Pressing on the ‘Map Asset’ button brings up the ‘Asset Mapping with Data Sheet’ screen as shown below

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

© Copy Right All rights reserved

19.6.2.1.2 Asset for This Data Sheet section

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



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

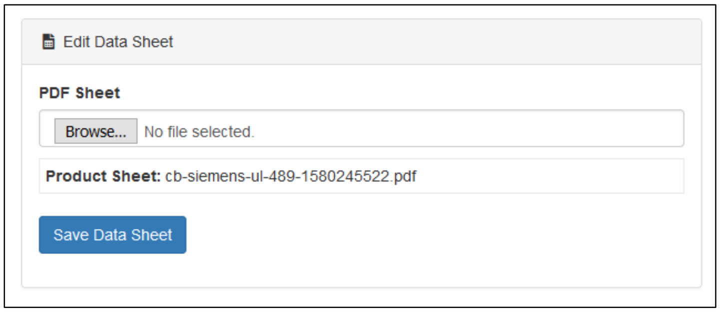
The assets list can be sorted in ascending or descending order by a specific column, by clicking on the up or down arrow on the respective column header

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

© Copy Right All rights reserved

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

© Copy Right All rights reserved