

# CM Web Dashboards



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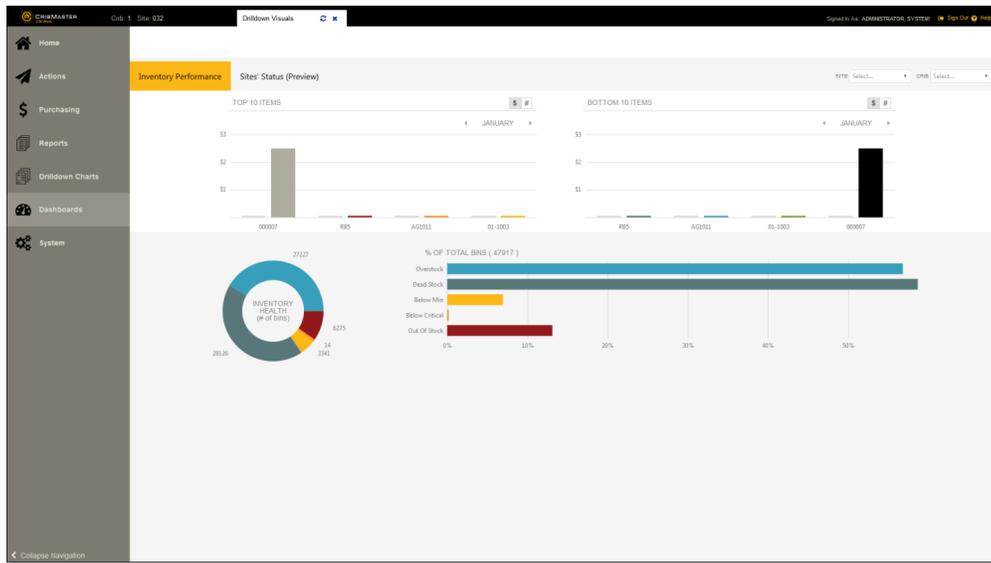
# Introduction

The CM Web Dashboards consists of two sections Drilldown Visuals and My Dashboards.

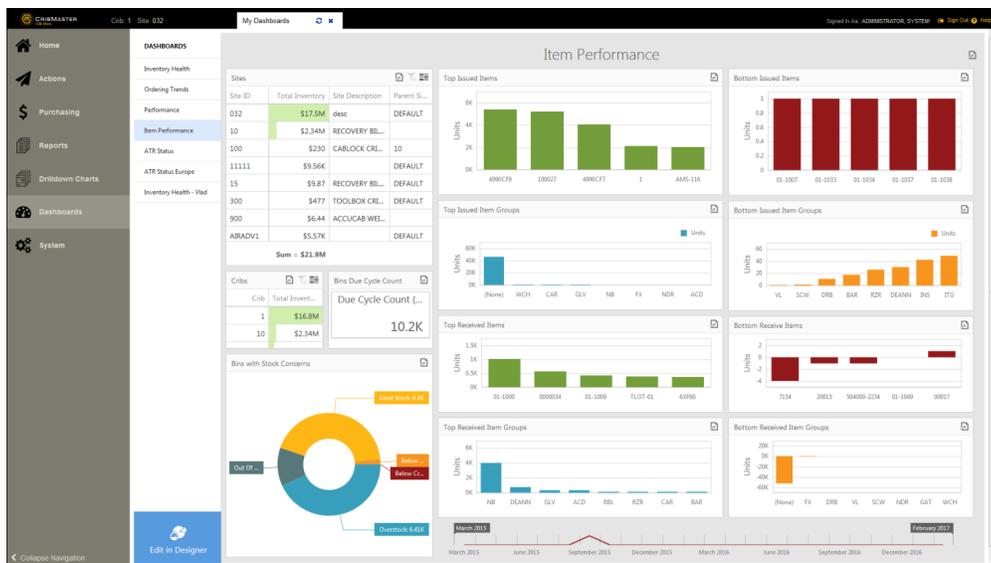
The Drilldown Visuals screen allows the user to see a visual snapshot representation of sites' inventory performance and a geographic visual of a region's sites status (i.e. ATR Status, Inventory Value).

The My Dashboards screen gives the user a variety of dashboards that show various types of information about the user's sites. Within My Dashboards (and through DevExpress) users are able to create customized dashboards to meet their particular business needs.

## DrillDown Visuals



## My Dashboards

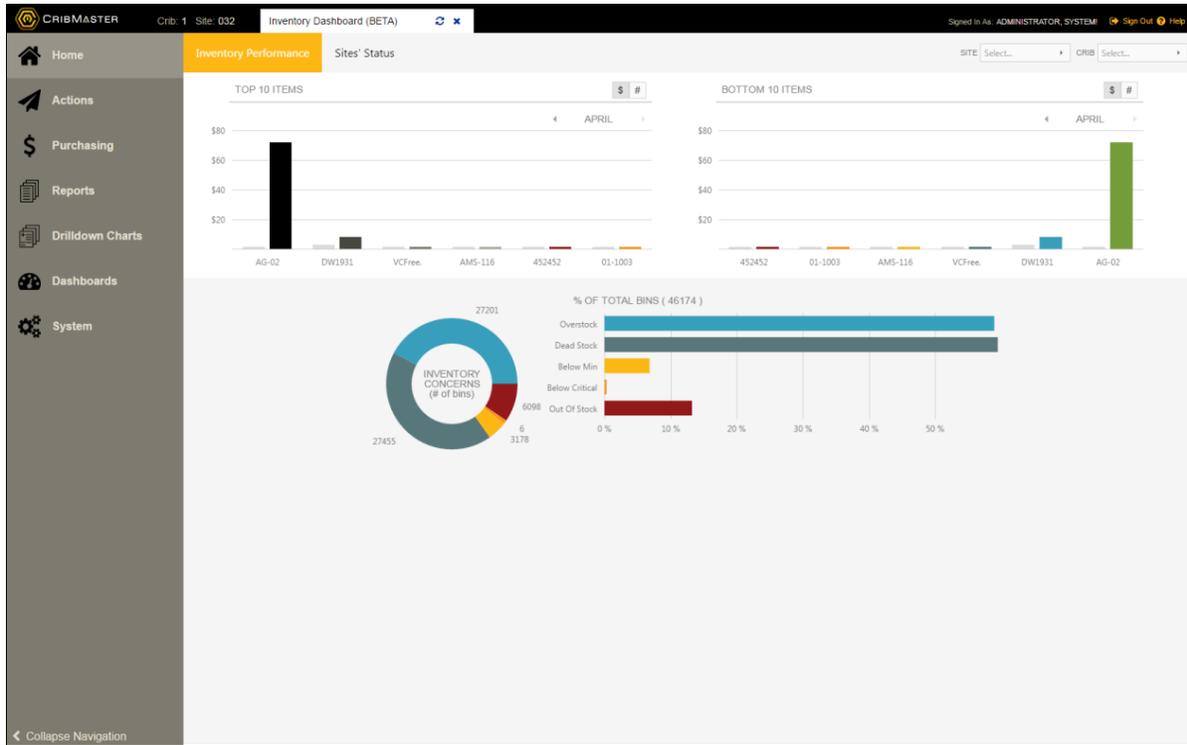


# Drilldown Visuals

The Drilldown Visuals screen consists of two parts: Inventory Performance and Maps.

## Inventory Performance

The Inventory Performance screen shows a snapshot of a site(s) current inventory performance. Hovering your mouse over various parts of the chart will produce a popup with more information about a particular item/stock status.



# Maps Screen

The maps screen shows geographic representation of a particular status for various sites. Each site can be clicked and drilled down various levels to access more information about the site's status.

- ATR Status

**Note:** Click on the crib number to drilldown to Crib Properties.

Inventory Performance
Maps: ATR Status

Crib	Status	Inv Value	Name	Type
1	Offline	\$16,811,099	CABLOCK - PA DEMO ROOM	Point of Use
3	Online	\$984	TOOLBOX - PA DEMO ROOM	AMS Toolbox
6	Offline	\$0	ACCUDRAWER - PA DEMO ROOM	CribMaster AccuDrawer
7	Online	\$200	ACCUDRAWER - PA DEMO ROOM	CribMaster AccuDrawer
8	Online	\$18,345	ACCUPORT	CribMaster AccuPort
9	Offline	\$9,058	WEIGH STATION - PA DEMO ROOM	Hybrid AccuCab/WeighStation
11	Offline	\$6	PROSTOCK	CribMaster ProStock
12	Offline	\$2,260	MULTISTORE	MultiStore EL
13	Error	\$3,227	PROSTOCK	CribMaster ProStock
14	Online	\$29	MODULOCK LOCKERS	CribMaster ModuLock

Sum: 16946283.8... Count: 65

**Site Info**  
CRIBMASTER  
Cribmaster  
1955 W OAK Cir  
Marietta, GA 30062

**Site Contact Info**  
LESTER100023, GLEN2  
contact@site032.com  
(229) 458-2536

**Login History**  
Last Login: E-00 - ADMINISTRATOR, SYSTEMI - 6/9/2017 9 06:04 AM

- Transactions Value

**Note:** Click on Item Numbers to access Item's Cribbin list.

Inventory Performance
Maps: Transactions Value

- ATR Status
- Transactions Value
- Inventory Value
- Open Orders

Crib	Trm Value	Trm Qty	Name	Type
2016	\$1,141	8	Test Crib	Standard
3017	\$113	50	JoeStock	CribMaster ProStock
1	\$38	16	CABLOCK - PA DEMO ROOM	Point of Use
20008	\$0	1	Ryan's Test Crib	Standard
20009	\$0	1	Ryan's Test Crib 2	Standard
3	\$0	0	TOOLBOX - PA DEMO ROOM	AMS Toolbox
6	\$0	0	ACCUDRAWER - PA DEMO ROOM	CribMaster AccuDrawer
7	\$0	0	ACCUDRAWER - PA DEMO ROOM	CribMaster AccuDrawer
8	\$0	0	ACCUPORT	CribMaster AccuPort
9	\$0	0	WEIGH STATION - PA DEMO ROOM	Hybrid AccuCab/WeighStation

Sum: 1291.85 Sum: 76

**Site Info**  
CRIBMASTER  
Cribmaster  
1955 W OAK Cir  
Marietta, GA 30062

**Site Contact Info**  
LESTER100023, GLEN2  
contact@site032.com  
(229) 458-2536

**Top Items**

Item	Value	Qty	Name
0000034	\$1,111	1	IMS TOOL v23
000007	\$113	43	LG BLACK CORD CLIP
01-1009	\$30	2	WEIGHT, 2.5 LB.
50023	\$15	1	150 MM CALIPER
58	\$13	1	SHEFFIELD BASE
000006	\$4	1	ORANGE BOX CUTTER 2
0001-008	\$3	1	GLOVED REWORKED (WASHED)
01-1015	\$2	1	MACHINE SCREW COMBO TRUSS HEA...
01-1018	\$1	1	COPPER CRIMP SLEEVE CONNECTORS
01-1017	\$0	1	FULL THREAD TAP BOLT

**Bottom Items**

Item	Value	Qty	Name
#123STAW1	\$0	1	123 ST/W12
000004	\$0	1	VALENITE INSERT BOX2
01-01	\$0	1	32BREAKAWAY RAZOR KNIFE
01-1003	\$0	1	MACHINE SCREW PHILLIPS PAN HEAD...
100080	\$0	1	RECOVERY BILL TEST KIT 2 ITEMS
C	\$0	1	TWO INCH PUTTY KNIFE
DURS102	\$0	1	CRIB-102 Durable Item
GT-127	\$0	1	GAUGE TEST ITEM
GT-129	\$0	1	GAUGE TEST ITEM
JoeRework8	\$0	1	Reworked

- Inventory Value

**Note:** Click on Item Numbers to access Item's Cribbin list.

Inventory Performance Maps: Inventory Value

Crib	Inv Value	Name	Type
1	\$16,813.099	CABLOCK - PA DEMO ROOM	Point of Use
2016	\$554.036	Test Crib	Standard
102	\$45,705	VIRTUAL CRIB TEST	Point of Use
8	\$18,345	ACCUPOINT	CribMaster AccuPort
104	\$11,629	CompressionTestCrib	CribMaster ProStock
1626	\$11,064	MC TEST LOT #s	CribMaster MultiStore
9	\$9,058	WEIGH STATION - PA DEMO ROOM	Hybrid AccuCab/WeighStation
21	\$8,533	PA Lab Hybrid	CribMaster Weigh Station
10067	\$4,750	Pro Lock Mini WPC	CribMaster ProLock
13	\$3,227	PROSTOCK	CribMaster ProStock
Sum:		\$17500313.863...	Count: 78

Site Info: CRIBMASTER, Cribmaster, 1955 W OAK Cir, Marietta, GA 30062

Site Contact Info: LESTER100023, GLEN2, contact@sale032.com, (229) 458-2536

Top Items

Item	Value	Name
000005	\$16,686,309	EX-LG BLACK CORD CLIP#52
0000034	\$563,277	IMS TOOL #23
00612344	\$93,080	BROWN CLAMPS WITH EXTRA LONG DESCRIP...
WEBTEST2	\$44,002	
9315GAUGE	\$25,095	9315 Sprint Gauge
30039	\$15,250	Some Item 30056
00017	\$9,102	SHOP TOWELS- TEST
01-1009	\$5,925	WEIGHT, 2.5 LB.
NGTEST	\$5,200	NGTEST APORT
00012	\$4,431	UPCA CODE SCAN TEST

Bottom Items

Item	Value	Name
000009	\$0	BI-METAL HOLE SAW
000008	\$0	NUCLEAR GRADE2
#123STW1	\$0	123 STJW12
#12/25T/W	\$0	Extension Cord
0001-008B	\$0	GLOVED REWORKED (WASHED) Reworked
00812	\$0	
01-01	\$0	32BREAKAWAY RAZOR KNIFE
01-1005	\$0	PLASTIC CASE (Serialized)
01-1027	\$0	ONE HOLE STRAP 1/2 INCH
01-CWDSBL	\$0	DURABLE SERIALIZED SCANNER TEST

- Open Orders

**Note:** Click on SEQ# to access PO Detail record or click on Supplier PO to access PO.

Inventory Performance Maps: Open Orders

Crib	Name	Type	Open Total
1	CABLOCK - PA DEMO ROOM	Point of Use	64
8	ACCUPOINT	CribMaster AccuPort	48
2	ACCUDRAWER - PA DEMO ROOM	CribMaster AccuDrawer	33
6161	Test ProLock	Standard	22
21	PA Lab Hybrid	CribMaster Weigh Station	22
2016	Test Crib	Standard	20
60	PA Lab Prostock Old Drawers	CribMaster ProStock	20
10028	TaChyla's E Drawer Generation 2	eDrawer Gen2	19
55	X3 Prostock	CribMaster ProStock	15
102	VIRTUAL CRIB TEST	Point of Use	13
Count:		48	Sum: 406

Site Info: CRIBMASTER, Cribmaster, 1955 W OAK Cir, Marietta, GA 30062

Site Contact Info: LESTER100023, GLEN2, contact@sale032.com, (229) 458-2536

PO Lines for - Site: 032

406 Total Open Order Lines

378

PO Lines - All

Seq #	Item	Quantity	Date Ordered	Days Due	Supplier PO
12341	4990CF7	1	9/9/2014	-957	1092
18417	PS-100	11	10/29/2014	-907	1232
18520	PS-100	1	10/30/2014	-906	1232
18821	5099-0008	1	11/1/2014	-904	1240
18822	CD-28	1	11/1/2014	-904	1240
19039	CD-22	1	11/3/2014	-902	1244
19057	CD-22	1	11/4/2014	-901	1249
19058	CD-22	30	11/4/2014	-901	1250
20038	000007	1903	11/6/2014	-899	1256
23206	PS-112	1	11/19/2014	-886	1287
Count:		406	Sum:		10180

# My Dashboards

## Dashboards Configuration

To properly configure CM Web Dashboards, add the following code to the **CMWebSettings.config** file and the **Connections.config** file. Both files should be located in the CribMaster Web folder (for example: *C:\Program Files (x86)\CribMaster\WebSites\CribMaster Web (CMWeb)*)

### CMWebSettings.config

After deploying CM Web 11, verify that the following exists in the *CMWebSettings.config* file:

```
<add key="DashboardDefaultTables" value="XTransDay,
XTransMonth, XEmployeeDay, XEmployeeMonth,
XPODetailsSum, XInventoryHealth, VXLotsToBeExpired,
VXATRStatus, VXATRLoginHistory, SiteProfile" />
<add key="DashboardDefaultTemplates" value="Inventory
Health,ATR Status,ATR Status Europe, Performance, Item
Performance, Ordering Trends" />
<add key="DashboardsPath"
value="~/Content/XYDashboards" />
```

```
<add key="DashboardDefaultTables" value="XTransDay, XTransMonth, XEmployeeDay, XEmployeeMonth, XPODetailsSum, XInventoryHealth, VXLotsToBeExpired, VXATRStatus, VXATRLoginHistory, SiteProfile" />
<add key="DashboardDefaultTemplates" value="Inventory Health,ATR Status,ATR Status Europe, Performance, Item Performance, Ordering Trends" />
<add key="DashboardsPath" value="~/Content/XYDashboards" />
```

The following list explains the options being set in the above code:

- DashboardDefaultTables
  - When set – allow an user to see and choose only tables that are specified in “value” attribute;
  - Option if not set - Show all tables when user is trying to create or modify data source in My Dashboards
- DashboardDefaultTemplates
  - When set – doesn't allow to save changes to dashboards with names provided in “Value” attribute for this option
  - Option is not set – Allow all dashboards (templates) to be modified and saved – assuming that user has “Dashboard: Edit” Access permission
- DashboardsPath
  - Override Default– will read and save all My Dashboards to that location on Web Server
  - Option is not set – My Dashboards would be read from and saved to “~/Content/XYDashboards”

### Connections.config

Verify that the following code exists in the *connections.config* file (this specifies the connection to the database:

```
<add name="WebDshBrd" connectionString="Data Source=
servername;Initial Catalog=DBname;User ID= id;
Password= pswd" providerName="System.Data.SqlClient"
/>
```

```
<add name="WebDshBrd" connectionString="Data Source=MRT-PA-DB-00\SQLEXPRESS2012;Initial Catalog=Cribmaster91Web;User ID=ddd;Password=Crbmr23451
providerName="System.Data.SqlClient" />
</connectionStrings>
```

# Security Management and Feature Activation

In regards to security management of the Dashboard Features, in general, there are three areas to consider:

- Granting Access To Dashboard Features and Managing User Permissions
- Securing User Access to specific Individual My Dashboard Templates
- Controlling the Data Sources Made Available for User Dashboard Building

## Granting Access to Dashboard Features and Managing User Permissions

**Note:** This must be done to access the dashboard feature in CM Web.

Security for CMWeb dashboards can be set in either CM (employee>access>dashboards) or CM Web (employee properties > security > dashboards).



These permissions allow various levels of access and functionality permission in regards to the CM Web Dashboard features:

**View** – employee can only view dashboards/charts features which encompasses access into the following CMWEB modules (areas):

- Drilldown charts
- System Health
- My Dashboards
- Drilldown Visuals

**Edit** – employee can edit custom and create new "My dashboard" templates inside the "My Dashboards" area (user must also have view granted)

**Modify Data Source** – employee can change the data source (Tables & Databases) of data inside the "My Dashboard" area used to generate dashboards (user must also have "view" and "edit" granted)

## Securing User Access to Specific "My Dashboard" Templates

Administrator can manage access into a specific "My Dashboard" page using Cribmaster Client 11's Report Management screen.

Administrator Users can hide/show "My Dashboard" templates for selection inside the Report Management screen in two ways:

### By Security Group

Inside the initial the Report Management view, it consists of records that represent each template that exists inside the "My Dashboard" area. When accessing one of the record's properties, the Administrator can

choose which security groups can access my enabling in at least one security group against that Dashboard

## By User's Site Access

This section also honors the site access settings for users. My enabling at least 1 site checkbox under the site access tab will protect the dashboard so that users that have been granted Primary or secondary permission site access to the sites selected will have the ability to select the dashboard to view, edit or modify data source.

## Controlling the Data Sources Made Available for User Dashboard Building

Administrators can also control what tables users can use to build their own dashboard templates privately or publicly.

Administrators can make modifications or adjustments to "Add key" entries inside the CMWebSettings.config:

```
<add key="DashboardDefaultTables" value="XTransDay,  
XTransMonth, XEmployeeDay, XEmployeeMonth,  
XPODetailsSum, XInventoryHealth, VXLotsToBeExpired,  
VXATRStatus, VXATRLoginHistory, SiteProfile" />
```

The tables listed above inside the "Add key" command are all tables that summarize trends and data being compiled all over your Cribmaster environment into simplified tables to report from.

**Note:** See the **Data Summarization** section for table definitions.

# Data Summarization

In regards to Summarization of Cribmaster Data to support the data driving of the Dashboard Features, in general, there are two categories to consider:

- Summary Tables
- Summary Maintenance

## Summary Tables

To support efficient extraction, summarization and aggregation of data across the vast amount of tables that exist in the Cribmaster database, the following summarization tables were created to house data from the tables in a organized manner to make dashboard content fast and easier to compile and ultimately display:

- **xtransday** - Contains a subset of transaction record data summarized on a daily basis. Records are Multi-Dimensional meaning Data can be summarized by SiteID, Item, Crib, User Defined Field values, consignment, etc.
  - Accumulates for 24 months by default
  - Are the Cost Sum and Qty Sum values being calculated?
- **xtransmonth** - Contains a subset of transaction record data summarized on a monthly basis. Records are Multi-Dimensional meaning Data can be summarized by SiteID, Item, Crib, User Defined Field values, consignment, transaction type, etc.
  - Populates 24 months by default
  - Are the Cost Sum and Qty Sum values being calculated?
- **xemployeeDay** - Contains a subset of transaction record data summarized on a daily basis. Records are Multi-Dimensional meaning Data can be summarized by Employee along with SiteID, Item, Crib, User Defined Field values, consignment, etc.
  - Populates 24 months by default
  - Are the Cost Sum and Qty Sum values being calculated?
- **xemployeemonth** - Contains a subset of transaction record data summarized on a daily basis. Records are Multi-Dimensional meaning Data can be summarized by Employee along with SiteID, Item, Crib, User Defined Field values, consignment, etc.
  - Populates 24 months by default
  - Are the Cost Sum and Qty Sum values being calculated?
- **xpodetails** - Contains a subset of PO Details record data summarized by a daily basis. Records are Multi-Dimensional meaning Data can be summarized by Site, Item Crib,
- **xpodetailsum** - Contains a sum
- **xinventoryhealth** - Contains a subset of data needed to populate the Inventory Health section. Records are Multi-Dimensional meaning Data can be summarized by KPI categories of Overstock, Deadstock, Out of Stock Bins containing Bins.
  - Accumulates by the month.
- **xinventoryhealthday** - Contains the same fields and data as Inventory Health. Inventory Health data is being compiled and kept daily from being fed from the Inventory Health.
- **xinventoryhealthmonth** - Contains the same fields and data as Inventory Health. Inventory Health data is being compiled and kept is being average on a monthly from being fed from the Inventory Health.
- **VXLotsToBeExpired** - Contains information associated to lot numbers.
- **vxATRstatus** - Contains information associated with ATR status.
- **vxATRloginhistory** - Contains information associated with login history.
- **vxstockoutItems** - Contains information associated with stock outs.

## Summary Tables Maintenance

Cribmaster Options - Configuration

- CM Agent option - Run Dashboard Summary Procedure; turning this on will enable summary tasks to be populated and refreshed daily.

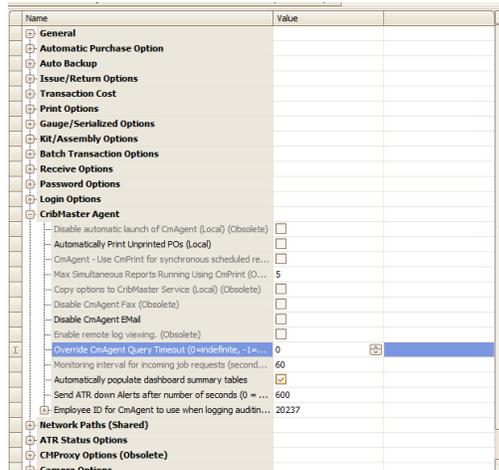


### GenerateDashboardSummary Stored Procedure:

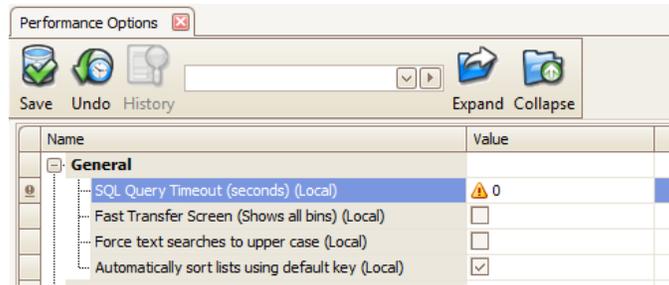
- The main Stored Procedure when executed, will execute other separate stored procedures that updates each summary table individually on a daily basis.

### Daily Run-Task by Agent

- By enabling the "Automatically populate dashboard summary tables" option in Cribmaster Client Configuration, Cribmaster Agent will now execute the "GenerateDashboardSummary" stored procedures as a part of its Daily Task List.
  - For those users with a large database:
    - Set Override CmAgent Query Timeout to 0



- Set SQL Query Timeout to 0 (System Options > Performance Options > SQL Query Timeout)



**Note:** Depending on the amount of data in your database the stored procedure query could take a significant amount of time.

# My Dashboard (Dashboard Designer)

**My Dashboards**  allow the user to view snapshots of the status of various attributes of the inventory system (i.e. ATR Status, Inventory Health, Item Performance).

Within My Dashboards, the user can create custom views of status

**Note:** In the edit functions, the data/data source of the built-in templates can NOT be modified, though the dashboards can be rearranged.

The following documentation is from <https://documentation.devexpress.com/#DashboardWeb/CustomDocument116575> and should be used in created customized dashboards.

The Web Dashboard allows you to create dashboards in a web browser and provides an intuitive UI that facilitates data binding, shaping, layout design, etc. Many of these normally complex tasks can be accomplished with a simple drag-and-drop operation, allowing you to start creating dashboards immediately.

The following links will guide you through the process of creating a dashboard:

[DevExpress Web Dashboard - Designer Mode Documentation](#)

[Creating a Dashboard](#)

[Providing Data](#)

[Adding Dashboard Items](#)

[Binding Dashboard Items to Data](#)

[Designing Dashboard Items](#)

[Data Shaping](#)

[Interactivity](#)

[Appearance Customization](#)

[Data Analysis](#)

[Converting Dashboard Items](#)

[Dashboard Layout](#)

[Undo and Redo Operations](#)

[Saving a Dashboard](#)

[Opening a Dashboard](#)

# Dashboard Troubleshooting

Problem: After installing CM 11 and activating the Dashboard features, some of the Dashboard pages are empty with no data being displayed.

Possible troubleshooting steps would be:

1. Check to see if the Dashboard Summary Stored Procedure has executed.
2. Attempt to run the Dashboard Summary Stored Procedure directly through SQL Server Management Studio. Observe if there are any errors.
3. If you receiving an *String or binary data would be truncated* error when attempting to execute the Dashboard Summary Stored Procedure, then run the **SQLResizeDashboardFields.sql** file found inside the **SQL Folder** in the **Cribmaster Client** Windows Directory.