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CMWeb Startup Guide









CMWeb Startup Guide

PMA.TPB.048d

CribMaster®

1955 West Oak Circle Marietta, Georgia 30062 770-419-1399 888-419-1399

Technical Support Line: 1-855-274-2267 (1-855-CRIBCMS)

www.cribmaster.com

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25 Aug 2016

1. Introduction

Note: This document is designed specifically for the BETA of CMWeb version 10.1.60513.0 only.

CMWeb is a web and cloud based version of the CribMaster client. With this platform the user will be able to access many of the client features through any computer and web browser that has access to the internet.

1.1 Related Documents

Note: The documents listed are available on the CribMaster Resource Library. <u>http://resource.cribmaster.com/</u>

- Creating and Restoring a SQL Database
- Import Validator Setup Guide
- CMweb Schema Utility Application

1.2 CMWeb Highlights and Functionality

1.2.1 CMWeb Highlights

• Data Specific Filtering Program

CMWeb allows the data to be filtered based on user acess. For more details see *CMWeb Site Filtering* on *page 35*.

- Report System with Built in Site Security
- Content automatically filtered by users site access
- Customization in Reporting
- Introduction of Web based Reporting
- Supports traditional reporting
- Interface for minor report modification (Note: Only Stimulsoft reports)
- Dashboards

Dashboards offer the user an opportunity to see a snapshot of reported data visually to a specific time period. Current Dashboard offerings:

- Stock: Dead Stock, Over Stock, Low Stock
- Usage: Site, Item, Group, Stock, and Employee Usage
- Inventory Value
- Simplified GUI
- Easy to navigate screens
- Flat icons





1.2.2 CMWeb Functionality Currently Available

Note: The following is a list of current CMWeb functionality as of 7 July 2016.

- Inventory Items
- Crib-Bin
- Serial ID
- Employee
- Item Limits
- Cost Centers (User1...6)
- Transactions
- Supplier
- Site Profile
- Issue Items
- Return Items
- Find Items
- Reservation
- Bin to Pending Rework
- Pending Rework Back to Bin
- Pending Rework to Supplier
- Cycle Counting
- Authorize Purchasing
- Return Purchased Items
- Review
- Receive Orders and Rework
- Inspect Receipts
- Edit Purchase Orders
- Purchase Order Details
- Complete Transfers
- Transfer Items
- Stock Satellite Bins
- Lot Numbers
- Add/Edit Stimulsoft Reports
- Bin Reports



- Employee Reports
- Kit Reports
- Transaction Reports
- Checked Out Reports
- Transfer Reports
- Receipt Reports
- Cost Centers
- Bin Labels
- Serial ID Labels
- Cycle Counting
- Purchase Order Detail
- Purchase Orders
- Pending Orders
- Scheduled Reports
- Drilldown Charts
- Dead Stock
- Over Stock
- Low Stock
- Site Usage
- Item and Group Usage
- Stock Usage
- Employee Usage
- System Health
- Import Validator
- Configuration (Note: Only modifies Crib Number)
- Craft Code
- Solution Generator

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2. CMWeb Installation

2.1 Prerequisites

- CribMaster Client version 10.1.60510 or later
- Minimum Hardware Requirements:
- Minimum Processor: 32 bit processor 1.0 ghz or greater
- RAM: 1GB or higher
- Hard Disk space: 200MB
- O/S: Win 7/8/2008/2012
- Recommended Hardware Requirements:
- Processor (recommended): Quad core 64 bit processor @ 1.0ghz per core or greater
- RAM: 16GB or Greater
- Hard Disk space: 10GB or Greater
- O/S: Windows 7/8/2008/2012 64 bit
- Installation requirements (all of these are provided when installing via MSI):
- .Net 4.5
- VC++ 2008 Redistributable (same as used in client, ATR, etc...)
- Crystal 2008 Runtime SP3 (same as used in client, ATR, etc...)
- End-User Requirements:
 - CMWeb is compatible with the following browsers:
 - IE
 - Chrome
 - Safari
 - **Note:** To ensure proper functionality, CMWeb should only be used with the latest versions of the above browsers.
 - Note: CribMaster Client must be installed prior to installing CMWeb.



2.2 Installation of CMWeb

- **Note:** If Import Validator functions are going to be utilized, reference document **PMA.TPB.095a Import Validator Setup Guide** for additional installation instructions.
- **Note:** If you are using Import Validator and/or Solution Generator

2.2.1 Schema Utility Application

Note: For additional information see CMWeb Schema Utility Application document.

Caution: Prior to CMWeb automatic or manual installation, ensure that the following schema utility application is run. Failure to do so will result in CMWeb not installing/functioning properly.

2.2.1.1 Why does this have to be done?

Some Features built into the CMWEB program depend on updates to the 10.1 database schema that will not be available until Cribmaster 10.2 or higher is released. These updates are necessary for CMWEB to run.

Once run, these specific schema updates will not need to be applied again. Cribmaster will automatically take previous updates into consideration when future versions of Cribmaster client 10.2 or higher or released.

2.2.1.2 Schema Utility Installation Steps

Note: Users must uninstall/remove previous versions of the schema utility manager before installing the latest version.

- Download program from FTP CMSchemaUpdateUtility.exe from <u>ftp://ftp.ecribmaster.com/Pub/Software/CMWEB/</u>
- 2. Run the CMSchemaUpdateUtility.exe. Installer will run and install to the specified default location as provided.
- 3. Navigate to default location and run CMSchemaUpdate.exe.
 - Note: Default location: C:/Program Files/Cribmaster Schema Update/CMSchemaUpdate.exe







🖳 Select Data Source		
Database	Primary CribMaster Database	
Database Provider Type	(none)	\sim
Custom Connection Information		^
Encrypt Connection Strings		

4. Insert in your "Primary Cribmaster Database" connection string and your "Data Manager Database" connection string under "Data Source"



- 5. Then select "Start Upgrade" and the utility will upgrade the database schemas of the "Primary Cribmaster Database' and "Data Manager Database".
 - **Note:** Utility will also update the Database Revision Number so that those updates aren't attempted again when future versions of CM Client are released

2.2.2 Turning ON IIS Features

- **Note:** IIS (Internet Information Services) features need to be enabled prior to the installation of CMWeb. If IIS features are not enabled, use the following steps to set up those features.
- 1. Click Start > Control Panel.
- 2. Depending on the **Control Panel** view, click either **Get programs** (see Figure 3) or **Programs and Features** (see Figure 4).





Figure 3

Adjust your computer's settings	2) Administrative Tools Color Management	Kg AutoPlay	View by: Small icons •
Action Center	Administrative Tools	Ro AutoPlay	Backup and Restore
BitLocker Drive Encryption Date and Time Devices and Printers	Color Management	Configuration Manager	
Date and Time		an counderson unguade	Credential Manager
Devices and Printers	Default Programs	Desktop Gadgets	Device Manager
	Display	G Ease of Access Center	Flash Player (32-bit)
Folder Options	A Fonts	👌 Getting Started	🚜 HomeGroup
A Indexing Options	Intel(R) HD Graphics	Intel® PROSet/Wireless Tools	1 Internet Options
🗈 Keyboard 🧯	Lenovo - Airbag Protection	Enovo - Microphone Mute	ID Location and Other Sensors
Mail (32-bit)	9 Mouse	Setwork and Sharing Center	Rev Notification Area Icons
NVIDIA Control Panel	Performance Information and Tools	Personalization	Phone and Modern
Power Options	Programs and Features	Q QuickTime (32-bit)	B Realtek HD Audio Manager
P Recovery d	Region and Language	RemoteApp and Desktop Connections	54P GUI Configuration
Sound i	Speech Recognition	Sync Center	👯 System
Taskbar and Start Menu	Troubleshooting	R User Accounts	Windows CardSpace
Windows Defender	Windows Firewall	Windows Mobility Center	Twindows Update

Figure 4



3. In the left-hand pan of the window, click Turn Windows features on or off (see Figure 5).





- 4. Expand Internet Information Services > World Wide Web Services.
- 5. Ensure that the following items are selected (see Figure 6):

.Net Extensibility	HTTP Errors
• ASP	HTTP Redirection
• ASP.NET	Static Content
ISAPI Extensions	Dynamic Content Compression
ISAPI Filters	Static Content Compression



6. Click **OK**.



2.2.3 CMWeb Automatic Installation

1. Download the **CMWeb** installation executable (CM WEB-10.1.60707.0) at: ftp://ftp.ecribmaster.com/Pub/Software/CMWEB/

Note: Save the file to an easily accessible location such as the desktop.



- 2. Double-click the installation executable
- 3. In the **Extract CribMaster Web Installation Files** window that appears, ensure that the destination folder is correct, and then click **Install**.
 - **Note:** The installation package will determine if your system has all of the prerequisite applications installed. If the system is missing any of these applications, the **Prerequisites Wizard** window will appear (see Figure 7).

If the **Prerequisites Wizard** window appears follow **steps 4** and **5** to ensure prerequisite programs are installed. Otherwise, **skip to step 7**.



Figure 7



4. Click **Next**. The prerequisites that need to be installed will be listed in the window that appears *(see Figure 8)*. The items that need to be installed will already be checked.

<u>.</u> *	CribMaster Web (CMWeb) Setup		×
	Prerequisites These programs are needed for the next to a prerequisite to select it for	application to run. Click on the check be r install or to skip it.	WEB CLIENT
	Name	Version	Action
	 NET Framework 4.5 Visual C++ 2008 SP1 Redistributa. 	Required: 4.5 or higher. Found: Required: any. Found an accept	Download Skip
	Press the Next button to download the p	Back Next Finit	sh Cancel

Figure 8

- 5. Click **Next** to install selected prerequisites. The **CribMaster Web (CMWeb) Setup** window will appear *(see Figure 9).*
 - **Note:** During the installation wizard of any prerequisite, accept all default options.
 - **Note:** The CribMaster Web Installation Wizard will also scan the system and determine if all of the necessary components are present and up to date.



Figure 9



6. Click Next and select I accept the terms in the License Agreement in the End-User License Agreement window that appears (see Figure 10).

j뭥 CribMaster Web (CMWeb) Setup	x
End-User License Agreement Please read the following license agreement carefully	IENT
CribMaster Software Agreement	<u> </u>
THE FOLLOWING LICENSE AGREEMENT APPLIES TO YOUR USE OF ALL SOFTWARE AND RELATED DOCUMENTATION PROVIDED BY CRIBMASTER ("CRIBMASTER"), INCLUDING CRIBMASTER OWNED SOFTWARE, SOFTWARE EMBEDDED IN HARDWARE ("EMBEDDED SOFTWARE") THAT IS PROVIDED BY CRIBMASTER,	Ŧ
I accept the terms in the License Agreement	
I do not accept the terms in the License Agreement	
Advanced Installer Kerken Ke	el

Figure 10

- 7. Click Next.
- 8. In the **Select Installation Folder** window that appears, ensure that the location for the installation is correct, then click **Next** (see Figure 11).

CribMaster Web (CMWeb) Setup		
Select Installation Folder This is the folder where CribMaster Web	(CMWeb) will be installed.	WEB CLIENT
To install in this folder, click "Next". To in "Browse". <u>Fo</u> lder:	stall to a different folder, ente	r it below or dick
C:\Program Files (x86)\CribMaster\WebSit	tes\CribMaster Web (CMWe	Browse
Web Application Name:		
CMWEB		
Advanced Installer	< Back Next >	Cancel

Figure 11



9. In the Ready to Install window that appears, click Next to begin the installation (see Figure 12).



Figure 12

10. In the Configure Database Connection window that appears, click OK (see Figure 13).



Figure 13

11. In the **Modify web.config or...** window that appears, click **Edit** (see Figure 14).



Figure 14



12. In the Select Data Source window that appears, enter the following (see Figure 15):

Note: *Figure 15* shows an example of the data source credentials. These values need to be changes to match the users data source information.

a. Database

Note: Ensure that the type of database is Primary CribMaster Database.

- b. Database Provider Type
- c. Server Name
- d. Database Name

Note: If the database requires authentication, uncheck the Use Integrated Security box and enter the database User Name and Password.

Select Data Source		
Database	Primary CribMaster Database	
Database Provider Type	SQL Server	
Server Name	MRT-PA-DB-00\sqlexpress2012	
Database Name	Cribmaster91	
Database Authorization		
Use Integrated Securit	y sa	
Password	*******	
Custom Connection Informat	on	
Cancel	gs	

Figure 15

13.Click OK

Note: If Crystal Reports Runtime is not installed, it will install at this time. 14.To complete the installation of CMWeb, click **Finish** (see Figure 16).



Figure 16



2.2.4 Validate CMWeb Installation

Note: Reference Figure 17 and Figure 18 for the following procedure.

- 1. Open IIS.
- 2. Navigate in your **Connections** to the installation as specified.
- 3. Under Manage Applications select Browse *.80(Http).
- 4. Figure 18 shows a successful installation and validation.



Figure 17



Figure 18



2.2.5 CMWeb Manual Installation

The following steps outline how to manually install CMWeb.

2.2.5.1 Download and Extract CMWeb Files

- 1. Verify that the prerequisites shown in Section 2.1 Prerequisites on page 9.
- 2. Turn on the required IIS features following the steps in Section 2.2.2 Turning ON IIS Features on page 11.
 - **Note:** Before proceeding ensure that an instance of CribMaster 10 is installed locally and pointed at the primary CribMaster database.
 - **Note:** If you are using import validator, please refer to document **PMA.TPB.095a Import Validator Setup** (<u>http://resource.cribmaster.com/library/asset/pdf/import-validator-</u> <u>setup</u>) and ensure that the pending database (the additional SQL database needed to support Import Validator and Solution Generator) is created before continuing with installation.
- 3. Create a new folder named **CMWeb** in a CribMaster oriented location. In the example shown in *Figure 19* the folder CMWEB was created in *C:\Program Files\CribMaster\WebSites\CMWEB*.

Yeavorites Name Ame	Share with Sain Hewronde	JIUI Y	1010 1010 10 10	Open	Drganize T
🔆 Favorites Name		<u>്</u>	and a de la	a open	- gamee
			Name		🚖 Favorites
Downloads CMWEB		}	CMW	ads	🚺 Downlo

Figure 19

- 4. Download the *CMWEB-ManualImage-10.1.60707.0.exe* file from: ftp://ftp.ecribmaster.com/Pub/Software/CMWEB/
- 5. Double click the CMWEB-ManualImage-10.1.60513.0.exe to begin the installation of the webservice.
- 6. In the installer window that appears, specify the destination folder for the extracted files (see Figure 20).
 - **Note:** The destination folder should be the pathway to the folder created in Step 3.



Figure 20



7. Click Extract. The extracted files will appear in the path of the folder previously created.

2.2.5.2 Modifying Connection.config

- 1. In the folder where the extracted CMWeb files are located, open the **connection.config** file in Notepad.
- 2. Change the values in the **<connectionStrings>**section to point to the appropriate CM 10 database (see *Figure 21*).
 - a. Change **SERVERNAME** to the name of the SQL Server being used.
 - b. Change **DBNAME** to the name of the CM 10 database to connect to.
 - c. Change **USERID** to the login id used to log in to the SQL server.
 - d. Change **PASSWORD** to the password used to log in to the SQL server.

connections.config - Notepad	- 0 X
File Edit Format View Help	
<pre>cconnectionstrings></pre>	<mark>)</mark> " providerName="MSSQL" /> [^] er

Figure 21

- **Note:** To use the **Import Validator** feature of CMWEB, you will need to setup a new, separate blank Data Manager (pending) database in your SQL environment and point to it using the **Pending** line of the **connectionStrings** section of the **connections.config** file.
- 3. Click on File > Save to save the changes made to the connections.config file.

2.2.5.3 Create a CMWeb IIS Application Pool

1. Navigate to the IIS Console Manager (see Figure 22) click Control Panel > Administrator Tools > Internet Information Services Manager

ile View Help		
mections MRT-RCB0930 (AMERICAS).R(MRT-RCB0930 Home	Actions Manage Server Restart Start Stop View Application Pools View Sites Change.NET Framework Version Help Online Help
	Features View 🚉 Content View	

Figure 22



2. Expand the *localhost.* In the example shown in *Figure 23* this would be the "*MRT-RCB0930*". Right-Click on **Application Pools** then click **Add Application Pool** (see *Figure 23*).

C Internet Information Services (IIS) Manager	
(→) (+) MRT-RCB0930 →	🖸 🐼 🔞 🔹
File View Help	
Connections MRT_RCR0030 Home	Actions
INIT FICE DOUG OF TOTHE Filter Application Add Application Pool NET NET Authorizat Compilation Application Add Application NET NET NET Authorizat Compilation Pages Globalization Levels Ettings Strings Controls Providers Session State SMTP E-mail	Manage Server Restart Start Stop View Application Pools View Sites Change .NET Framework Version Help Online Help
Ready	€ ⊒.:

Figure 23

- **Note:** CMWEB uses a .Net 4.0 Framework Version.
- 3. To Create the Webservice Application Pool for CMWeb, provide a descriptive name like <u>CMWEB</u> <u>AppPool</u> in the Name section and set the framework to .NET Framework 4.0 (see Figure 24).

CMWEB App Pool	0		
NET Framework v	ersion:		
NET Framework	4.0.30319		-
Managed pipeline	mode:		
Integrated	-		
Ctart annliantia	n nool immo	listely	

Figure 24

4. Click OK.



Note: For 64-bit machines, after creating the Application Pool, access Advanced Settings (right click AppPool->Advanced Settings...) and set Enable 32-bit applications to TRUE (see Figure 25).

	Apathin affects Presis.	
General)		
.NET Framework Version		1
Enable 32-Bit Applications	True	
Managed Pipeline Mode	Integrated	
Name	ASP.NET v4.0	E
Queue Length	1000	
Start Automatically	True	
E CPU		
Limit	0	
Limit Action	NoAction	
Limit Interval (minutes)	5	
Processor Affinity Enabled	False	
Processor Affinity Mask	4294967295	
Process Model		
Identity	ApplicationPoolIdentity	
Idle Time-out (minutes)	20	
Load User Profile	True	
Maximum Worker Processes	1	
Ping Enabled	True	-

Figure 25

2.2.5.4 Create a CMWeb IIS Application Site

- 1. Return back to the Internet Information Services (IIS) Manager and expand the sites folder.
- 2. Right Click **Default Web Site** then click **Add Application** (see Figure 26).

nnections			()-m							Act	tions
MRT-RCB0930 () Application 1 Stes Construction 2 Construction 2 Construct	AMER Pools	ICAS\RCB0930) tel Explore Edit Permissions Add Application Add Application Edit Bindings Manage Web Site Refresh Remove Rename	Filter: ASP.N	ET	KI-KCB09 .NET Compilation Connection Strings SMTP E-mail	Go - C	Show All .NET Globalization Pages and Controls	Group by: .NET Trust Levels Providers	E	♦ ↓	Manage Server Restart Storp View Application Pools View Sites Change -NET Framework Version Help Online Help
		Switch to Conten	t View	-		1	A REAL	ERE.			

Figure 26



- 3. In the Add Application window that appears do the following (see Figure 27):
 - a. In the Alias field, enter an alias name to be used for the application.
 - b. In the **Application pool** field, click **Select** to change the application pool from **DefaultAppPool** to the App Pool created in *Section 2.2.5.3* called **CMWEB AppPool**.
 - c. In the **Physical Path** field, click like to point the path toward the folder created in Section 2.2.5.1 where the extracted CMWeb files are located.

Site name: Default Web Site Path: /		
Alias:	Application pool:	
CMWEB	CMWEB App Pool	Select
Example: sales Physical path: C:\Program Files\CribMaster\\	VebSites\CMWEB	
Pass-through authentication	ngs	

Figure 27

- Note: By Pressing OK My Webservice URL will be: <u>Http://(HostnameorIPAddress)/CMWEB</u>
- 4. Click OK.



3. CMWeb Basic Overview

Main Menu Screen



Figure 28

Table 1, Main Screen Overview Descriptions

No.	Description
1	Top Level Menu. This menu on the left sidebar gives the user access to the following functions: Home, Actions, Purchasing, Reports, Dashboards, and System.
2	Shows the current Crib and Site. The Site dropdown button allows the user to choose the site to be administered with CMWeb.
3	This area shows the name of the current user logged into CMWeb.
4	The main area of the screen; shows the available functions for current category chosen (the example image show the options when the Admin category is selected.
5	Clicking on the CribMaster logo/name will display the current CMWeb version, CribMaster company, and technical support information



3.1 CMWeb Basic Navigation Icons

Navigation Icon	Function
0	Refreshes current page
×	Closes current page/tab and returns user to previous page
🕩 Sign Out	Allows user to logout of CMWeb
Properties	Allows user to view properties of employees, items, cribs, etc.; this function also allows user to modify employees, items, cribs, etc.
Save	Allows user to save and changes or modification made in a particular section (i.e. employees, items, etc)
Add Add	Allows user to add new employees, items, etc. in particular areas
Delete	Allows user to delete employees, items, etc. in particular areas



4. Appendix A: CM10 Web Security Logic and Implications to CMWeb

CribMaster 10 desktop client includes an optional new "per site" security model that is an extension of the existing "per crib" security model, with a few differences and extensions. The option for activating the new model, **Enable separate security privileges for primary and non-primary cribs**, is located in the **Configuration Options** *(see Figure 29)*.

Configuration Options 🔯								
Save Undo History Expand Collapse								
Name	Value							
Contraction of the second seco								
Crib Number (Local)	1							
Show warning messages								
Save database messages in log file								
Close report dialogs automatically after Print or Preview (Local)								
Enable separate security privileges for primary and non-primary sites and cribs	\checkmark							
Also require transaction privileges for CribMaster ATR (vending equipment)	\checkmark							
···· Use large critical alert message format								
Small Critical Alert message includes Item Number								



A second new feature in the model is that access permissions assigned at the site level is inherited by all the cribs associated with the site unless overridden by access specifically granted at the crib level. Denial of access cannot be overridden; if access to a site is denied, then no access can be granted to cribs associated with the site.

CribMaster 10 also introduces a two-level site hierarchy.

Note: The terms "secondary" and "non-primary" should be considered equivalent. Both terms appear in the software, with the expectation that reference to "non-primary" will be replaced over time.

Each site can be assigned a "parent" site, from which access is also inherited. As with crib access, denial of access at the parent level cannot be overridden. If access is denied to a parent site, then no access can be granted to any of the child sites or any crib within a child site.

The primary difference to always remember when working between CMWEB and CM Client 10 is that CM WEB will site filter the records displayed within a grid displayed on the screen when accessing a major CM mode of operation like: Employee, Cost Centers, Inventory, Crib-Bin, Supplier, Purchasing etc.

If per site security is enabled, then the new security model utilizes two major components to control the security of data: Employee Access Level and Site Access.

4.1 Employee Access Level –CM Application Accessibility and Role Definition

Since access of some sort must generally be granted at the site level when using per crib security, this has implications for the employee creation process. Previously, an employee could be given access simply by



assigning secondary or non-primary permissions. Use of these permissions did not require an explicit crib assignment in previous versions of the software. In the new model, the "Global" employee access level can be similarly used to grant universal access without requiring any site or crib assignments. However, employees with "General" or lower access must be explicitly granted access to the sites or they will not be able to access functions in the software.

The Employee Access Level dropdown can be accessed against any employee record inside their properties at the "Name and ID" tab level *(see Figure 30)*.

Record :	1of 1 🕨 🗰 🕂 💳				Print Print Refres			
Employee 20236 :	Butler, Ryan							
Name and ID Def	Faults Links History	Access Buyer (Groups Transactio	ns W.O. History Au	dit Login History Se			
Employee ID:	20236	Site ID: DEFAUL	Т	Local ID:				
First Name:	Ryan							
Last Name:	Butler							
Start Time:	12:00 AM							
End Time:	12:00 AM 🗘 🗙							
Labor Rate:								
Password:	*****							
Expiration:	VX	Expire password immediately						
Badge Number:	20104	(if different than Employee ID)						
EMail Address:	Ryan.Butler@sbdinc.com	6						
Supervisor:								
Default Language:			\checkmark					
P.O. Approval Limit:	7							
Access Level:	General 🔽	External Supplier Access Only (cannot login to the standard CribMaster)						
Inactive Employee		FOD Control:	\checkmark					
Custom Fields								
Name		Value			^			
Category:		40			=			
08/08/2014								
Category: Ge	neral							

Figure 30

The drop down selections provided in the Employee Access Level field controls the user's CM application accessibility and enable the overall site dropdown a user will be able to manage:

- Restricted: ATR only, No Access to CMWEB or Client
- Limited: ATR and Advantage Web only, No Access to CMWEB or Client
- <u>General:</u> Normal access (basically the previous security model). All applications permitted, Site Dropdown Enabled for different site selection
- <u>Global:</u> All applications, and all sites and cribs permitted. (No need to assign any sites or cribs even if using per crib/site security). This role should be used for Entire System Administrators ONLY. Subsequently, CMWEB's Menu Bar Site Dropdown is disabled and set to Default or ALL permanently.



Note: If you aren't using per crib/site security, there is no functional difference between Global and General.

4.2 Upgrade Considerations

CribMaster 10 will automatically apply the necessary database upgrades to configure the new security model in a manner that is as consistent as possible with the security assignments that were in force in the previous version.

There are 3 possible scenarios for the upgrade which depend on whether "per crib" security was previously in force, and also whether "site filtering" was previously enabled.

In every case, as part of the upgrade the site hierarchy is initialized with the DEFAULT site assigned as the parent of all other sites in the database.¹ This has implications for the security implementation in all 3 scenarios.

1. Per crib security not previously active (Normally imposed on Advantage Databases)

This is the simplest scenario. No other initialization of site-specific access is done in this case and the previous security model largely applies.

In a site-filtered environment, users in the DEFAULT site still have universal access after the upgrade. However, now this is explicit because the DEFAULT site is the parent of all the other sites in the database and access is now inherited.

2. Per crib security active, site filtering not enabled

Every user with any permission at all is given "secondary" access to the DEFAULT site. This corresponds precisely to the type of access previously conferred under the "per crib" model: users have "primary" access to their explicitly assigned cribs, and "secondary" access everywhere via inheritance from the DEFAULT site.

3. Per crib security active + site filtering enabled

Main Menu

X -

CRIBMASTER

Crib: 1 Site: 032

Each user is given "secondary" access to their explicitly assigned site (e.g. EMPLOYEE.EMPLOYEESITEID).

<u>CMWeb IMPORTANT</u>: The primary difference to always remember when working between CMWEB and CM Client 10 is that CM WEB will site filter the records displayed within a grid displayed on the screen when accessing a major CM mode of operation like: Employee, Cost Centers, Inventory, Crib-Bin, Supplier, Purchasing etc. Therefore at all times, it is very important to pay very close attention to the Overall CMWEB Site Dropdown when accessing the different screens throughout CMWEB. Much of the data of the CMWEB area are filtered down according to the site value you have specified in the dropdown shown in *Figure 31*.

Figure 31

¹ Provided that a parent was not previously assigned, as might occur in a pre-release database.



4.3 Site Access – Granting Accessibility to Manage Data and Crib Access Pertaining To Specific Sites

In the new security model using per site security *(see Figure 29, page 27)*, there are two types of access can be explicitly granted to either sites or cribs: "primary" access and "secondary" (or "non-primary") access.

Note: The terms "secondary" and "non-primary" should be considered equivalent. Both terms appear in the software, with the expectation that reference to "non-primary" will be replaced over time.

Separate security group and individual permission assignments are available for each type of access.

In an extension to the legacy per crib model, access can also be completely denied to either a site or a crib. This contrasts with the old model in which a crib was either a "primary" or a "non-primary" crib and explicitly assigned cribs were primary and all others were considered non-primary. In the new model, primary and non-primary crib and site access is explicitly specified.

This access can be granted per employee by entering the employee properties and navigating to the "Site Access" tab. *(see Figure 32* and *Figure 33).*

\odot	Buyer Groups	Transactions	Security History C		raft Codes Site /		Access		
202	36 - Butler, Ryan			50	ж	\oslash	T	*	Ø)
	Id	Name	Site Access None		Site Access	Primary	Site A	ccess Secondar	y .
$_{\odot}$	10	RECOVERY BILLING CRIB	0		۲		0		
Э	DEFAULT		0		۲		0		

Figure 32



ID Name None 012092014 2 • 10 RECOVERY BILLING CRIB • DEFAULT • • E GERMANY GERMANY SITE PROFI •	Primary	Secondary O O O O O
ID Name None 012092014 2 Image: Constraint of the second se	Primary	Secondary
012092014 2 10 RECOVERY BILLING CRIB DEFAULT O Termany GERMANY SITE PROFI	© 0	0
BEFAULT GERMANY SITE PROFI	0 0	00
GERMANY GERMANY SITE PROFI	0	0

Figure 33

In the new security layer of Cribmaster 10, sites can be distinguished as a Parent Site or a Child Sites that can be assigned to the Parent Site. This is done through Cribmaster Client and accessing the Site Record's properties under **Purchasing** > **Site Information Tab** > **Parent Site ID** field *(see Figure 34)*.

	\$ 12	2 🕴 🔇 🔛	🐹 💝	3	Site Profile DEFA	ULT : Default	Site Profile			9	Reife
-					Site Information	ATR Options	Bar Code Mapp	ing			
(۵ ն	2			Site ID:	DEFAULT		Default Site Pro	file		
	ag a column h	eader here to group by that column			Site Name:			4854451620	1		
	TD (P Description	Buyer	Buy	Site Group ID:			Site Prefix:	Default Language:		
4	Defaul	beschpton	bajer	- Day	Parent Site ID:	b/vending machi	ne access control	Override use	r-defined field configura	ation for this site	
-	DEFAULT	Default Site Profile			Purchase Ord	ler Defaults					
	1				Company	9					
					Site Buyer ID:						
					Instructions*						
					Comment*						
					Fax Number:				Phone Numbe	er: 236653	
					Override Auto	o-Purchase Days	: Sun	Mon Tue	Wed Thu	Fri 🗌 Sat	
					Require appro	oval of automati	c <mark>ally g</mark> enerated P	urchase Orders			
					PO Approver ID:						
					Additional Email:						
					Ship To Address				Bill To Address		
					8				4		

Figure 34



If a Site Profile, does not have a Parent Site ID site value listed it would be assumed by the software that this particular site is a Parent Site.

Underneath Parent Sites, you can have Child Sites assigned to the Parent Site. Each of the Child Sites can have specific cribs assigned to them. This gives the user the ability to manage a group of sites by assigning their employee record to the Parent Site ID *(see Figure 35)*.

Record	1 of 1	•	₩+-	~						Print	🔗 Re	fre	sh
Name and ID Def	faults	Links	History	Access	Buyer Group	s Transac	tions W.	O. History	Audit	Login Histor	ry Se	<	>
Employee ID:	2023	5		Site ID:	DEFAULT		V×	Local ID:					^
First Name:	Ryan												
Last Name:	Butler												
Start Time:	12:00	AM .	÷×										
End Time:	12:00	MA	÷×										
Labor Rate:													
Password:	****	*****											
Expiration:			VX	Expi	ire password in	nmediately							
Badge Number:	2010-	4		(if differ	ent than Empl	oyee ID)							
EMail Address:	Ryan	.Butler@	sbdinc.con	n									=
Supervisor:													
Default Language:					~								
P.O. Approval Limit:													
Access Level:	General 🖌			External Supplier Access Only (cannot login to the standard CribMaster)									
Inactive Employee			FOD Control: 0 - None						~	2			
Custom Fields													
Name				Value							^		
Category:											=		
08/08/2014													
Category: Ge	neral										-	_	~

Figure 35

In CMWEB or CribMaster Client, access permissions for data and cribs can be managed from the Site Access tab. All permissions applied to an employee record's "Grant/Deny" columns inside their respected "Access Tab" will be applied to Cribs and Sites that have the "Site Access Primary" buttons enabled *(see Figure 36* and *Figure 37*.

mployee 20236 : Butler, Ryan													
Access Buyer Groups Transactions	W.O. History Audit Logi	History Security	History Craft Co	des Site Access	144	4 4 Record 1 of 1	1. 5 56 66	+					Print @ Refre
2022C Bulles Dure					Emp	ployee 20236 ; Butle	er, Ryan						
20236 - Butler, Ryan				(j) &	Ace	cess Buyer Groups	Transaction	s W.O. History	Audit	ogin History	Security History	Craft Co	ides Site Access
Primary Crib Privileges		Item Access		-	But	der, Ryan	1	B					
Show Primary Crib Privileges		Access	Description	T	F	ID	Nam	c	None		Primary	11.	Secondary
Code Description	B	A	All Items		3	012092014	2			•	0		
		1.		Line N		(-)- 10	REC	WERY BULLING CRIL	3	0	۲		0
Name	Grant	Deny	NP Grant	NP Deny		DEFAULT				0	۲	٥	0
Asset	L					GERMANY	GER	SANY SITE PROFI			0		0
+- Common Numbering System	5		~		1.0								
🔅 Crib	5		~										
🕀 Crib/Bin	5		\checkmark										
Custom Fields	5		~										
- Cycle Counting	6		~										
Database Utilities			~										
+- Employee	5		~										
+ Gauge	5												
+- Inspected Tool	5												
(+) Inventory	5												
(+)- Kit	5												
T Misc													
+ Purchasing	5												
Recovery Bill	5												
- I Dennet	-												





	History Access	Security Buyer Groups	Transa	actions Security Hist	ory Craft (
	Name Grant	Deny	NP Gr	ant NP Der	IY.							
	Asset	۲	0 .	0								
	Common Numbering System	۲	0 🖲	0								
	Crib	۲	0 .	0								
	Orib/Bin	۲	0 0	0								
	③ Custom Fields	۲	0 .	0								
	Ocycle Counting	۲	0 0	0								
	Database Utilities	۲	0 .	0								
	Employee	۲	0 💿	0								
	③ Gauge	۲	0 .	0								
	Inspected Tool	۲	0 💿	0								
	Inventory	۲	0 💿	0								
	🛞 Kit	۲	0 .	0								
	Misc	۲	0 💿	0								
	Purchasing	۲	0 💿	0								
	Recovery Bill	۲	0	0								
	Reports	۲	0 .	0								
	Reports Plus	۲	0 0	0								
	Serial ID Status	۲	0 .	0								
	Supplier	۲	0 .	0								
	Task	۲	0 .	0								
	TouchScreen	۲	0 .	0								
	Transaction	۲	0 🖲	0								
	Transastiana	Coourily Uliston	0	t Codes	Cito Associa		0					
Buyer Groups	Transactions	Security History	Gra	t Codes	Sile Access		0					
20236 - Butler, Ryan			55	X (7 0	*	Ø					
Id	Name	Site Access None		ite Access Secondary								
⊕ 10	RECOVERY BILLING CRIB	0		۲		C						
		0		۲		C						



All the permissions applied to an employee record's "NP Grant/ NP Deny" columns inside their respected "Access Tab" will apply to the sites that have the "Site Access Secondary" buttons enabled.

To prevent an employee from being able to access data or a crib physically, one will enable the "Site Access None" button against the site or crib,

To expand out the crib values associated to each child or parent site:

Select the Crib ALL icon to display the Crib values associate to each site *(see Figure 38)*.

€		Security	Buyer Groups	Transactions	Security H	istory	Craft Codes	Site Acce	ess
202	36 -	Butler, Ryan			55	X	0	r *	Ø
	Id		Name		Site Access None	Site	Access Primary	Site Access Sec	ondary
9	10		RECOVERY	BILLING CRIB	0	۲		0	
S	DEF	AULT			0	۲		0	
	Θ	032	PA Cribs		0	۲		0	
	Θ	11111			0	۲		0	
		12346	Site Test #2	3	0	۲		0	
	(\mathfrak{g})	15	RECOVERY I	BILLING SITE 2	0	۲		0	
		Crib 150	KIT CRIB		0	۲		0	
		Crib 200	CAROL TEST	CRIB - MANUAL CRIB	0	۲		0	

Figure 38



To hide the crib values associate to each child or parent site:

Select the Crib NONE icon to hide the Crib Values associated to each site

Note: By default, the crib values are hidden and only parents and children sites are displayed.

The primary difference for data security between CMWEB and Cribmaster Client is that CMWEB site filters the records displayed within a grid displayed on the screen when accessing a major CM Object.

CMWEB Site Filtering logic for each CMWEB page grid and object is captured in Sections 5.3 and 5.4.

4.4 CMWeb Site Filtering Hierarchy

<u>MENU BAR SITE DROP DOWN:</u> Sites That Current User Has Permission To OR Single Site User Picked From Drop Down

USER SITES: Sites that Current User has Permission

USER'S CRIBS: Cribs that Current User has Permission

<u>CURRENT CRIB</u>: Current Crib Number of the Current User (System>Configuration>Crib)

CURRENT SITE: Site ID of the Current Crib

EDITING RECORD SITE: Current Selected Record

4.5 CMWeb Site Filtering Chart

Transaction Checked Out Cost Centers Cycle Counting PO PO Scheduled Reports Scheduled Reports Dashboards Usages	Transaction Checked Out Cost Centers Cycle Counting PO Scheduled Reports Scheduled Reports Stocks	Transaction Checked Out Cost Centers Cycle Counting PO Scheduled Reports Dashboards	Transaction Checked Out Cost Centers Cycle Counting PO Scheduled Reports	Transaction Checked Out Cost Centers Cycle Counting PO Scheduled Reports	Transaction Checked Out Cost Centers Cycle Counting PO	Transaction Checked Out Cost Centers Cycle Counting	Transaction Checked Out Cost Centers	Transaction Checked Out	Transaction		Supplier	Employee	Inventory	Bin	Add/Edit	Reports	PO Details	PORequest, I	Edit PO	Receive Orders	Cost Centers	Review	Cost Centers	Authorize Purchase	Purchasing	Cost Centers	Employee fie	Return Items	Cost Centers	Employee fie	issue items	Actions	Config	Site Profile	Transactions Grid	History	*Supplier Grid	Cost Centers Grid	PO History	Crib/Crib-Bin Grid	Reservations	History	CribBin Grid	[‡] Inventory Grid	Supervisor fi	Transactions	Cost Centers	Employee Grid	Admin	Screen/Page	
																		OApprover, CreatedBy, BuyerID									ld			b															ald and others employee pop-ups	Tab	Tab				
	No	No			No	No	No	No	No	No	No	No	No	No	No		Yes	Yes	Yes	No	No	Yes	No	Yes		No	No	No	No	No	No			Yes	Yes	No	No	Yes	No	Yes	No	No	No	No	No	No	No	Yes		Site Drop Down	
	Yes	Yes			No	Yes	Yes	Yes	Yes	Yes	No	Yes	No	Yes	No		Yes	Yes	Yes	No	No	Yes	No	Yes		No	No	No	No	No	No			Yes	Yes	No	No	Yes	No	Yes	No	No	No	No	No	No	No	Yes		llser's Sites	
	No	No			No	No	No	No	No	No	No	No	No	No	No		Yes	No	No	Yes	No	Yes	No	Yes		No	No	Yes	No	No	Yes		Yes	No	Yes	Yes	No	No	Yes	Yes	Yes	Yes	Yes	No	No	Yes	No	No		llser's Cribs	
No.	No	No			No	No	No	No	No	No	No	No	No	No	No		No	No	No	No	No	No	No	No		No	No	Yes	No	No	Yes			No	No	No	No	No	No	No	No	No	No	No	No	No	No	No		Current Crib	
5	No	No			No	No	No	No	No	No	No	No	No	No	No		No	No	No	No	No	No	No	No		Yes	Yes	No	Yes	Yes	No			No	No	No	No	No	No	No	No	No	No	No	No	No	No	No		CurrentSite	
NIA	No	No			No	oN	No	No	No	No	No	oN	No	No	oN		oN	oN	No	No	Yes	No	Yes	No		No	No	oN	No	No	No			No	No	No	No	No	oN	No	oN	No	No	No	Yes	No	Yes	No		Editing Record Site	Eiltarad by
					HIDDEN						HIDDEN		HIDDEN						*No filtering by User's cribs otherwise it could show incomplete po details	All Cribs: all user's cribs in current site area		All Sites: OFF: only current site area. ON: no extra filter		All Sites: OFF: only current site area, ON: no extra filter				All Cribs: all user's cribs in current site			All Cribs: all user's cribs in current site			??New site: how does it show in the grid?			NO FILTER!			All Cribs: show all bins I have permission to				NO FILTER!				Site Access/Crib Access tab displays based on Enable Site filtering option		ee Norec	

Figure 39