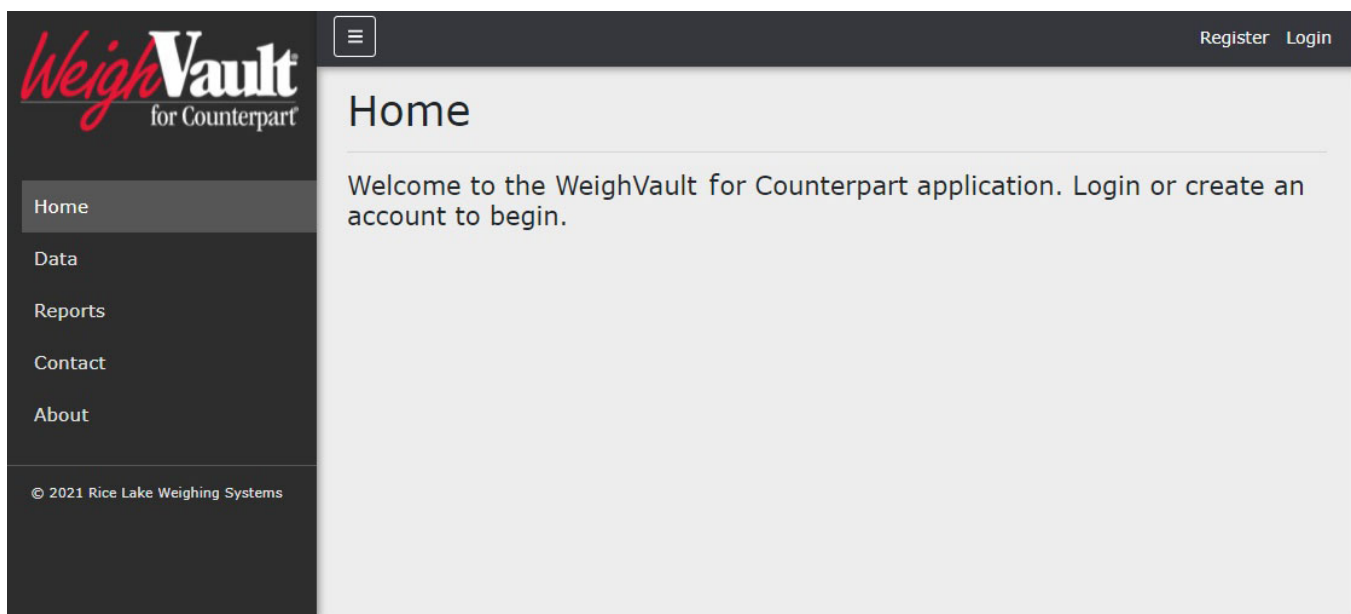


WeighVault[®] for Counterpart[®]

Web Application and Middleware Service

Technical Manual



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Revision History

This section tracks and describes the current and previous manual revisions for awareness of major updates and when the updates took place.

Revision	Date	Description
A	04/14/2022	Initial manual release; Version: 2.0.0.0

Table i. Revision Letter History



Technical training seminars are available through Rice Lake Weighing Systems. Course descriptions and dates can be viewed at www.ricelake.com/training or obtained by calling 715-234-9171 and asking for the training department.

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1.0 Introduction

This manual provides an overview of the WeighVault installation, configuration, administration and operation procedures. WeighVault allows Counterpart users to add, edit, and access parts over a network connection. WeighVault exceeds the counterpart's 150 part database capacity. It also collects data as weighments occur, and provides detailed reports for parts, inventory, location, and activity which can be exported to a variety of formats including Excel, Word, and PDF.



Note

Images in this document are for illustration only, WeighVault appearance varies depending on screen resolution, screen size and internet browser.



Manuals and additional resources are available from Rice Lake Weighing Systems at www.ricelake.com/manuals

Warranty information can be found on the website at www.ricelake.com/warranties

Safety Signal Definitions:



DANGER

Indicates an imminently hazardous situation that, if not avoided, will result in death or serious injury. Includes hazards that are exposed when guards are removed.



WARNING

Indicates a potentially hazardous situation that, if not avoided, could result in serious injury or death. Includes hazards that are exposed when guards are removed.



CAUTION

Indicates a potentially hazardous situation that, if not avoided, could result in minor or moderate injury.



IMPORTANT

Indicates information about procedures that, if not observed, could result in damage to equipment or corruption to and loss of data.

General Safety



Do not operate or work on this equipment unless this manual has been read and all instructions are understood. Failure to follow the instructions or heed the warnings could result in injury or death. Contact any Rice Lake Weighing Systems dealer for replacement manuals.



WARNING

Failure to heed could result in serious injury or death.

Do not allow minors (children) or inexperienced persons to operate this unit.

Do not operate without enclosure completely assembled.

Do not place fingers into slots or possible pinch points.

Do not use this product if any of the components are cracked.

Do not make alterations or modifications to the unit.

Do not remove or obscure warning labels.

Do not submerge.

Before opening the unit, ensure the power cord is disconnected from the power source.

Disconnect all power before servicing. Multiple power sources may be present. Failure to do so may cause property damage, personal injury or death.

For permanently connected equipment, a readily accessible disconnect device shall be incorporated in the building installation wiring.

Pluggable units must be installed near the socket/outlet and be easily accessible.

Use copper or copper-clad aluminum conductors only.

1.1 System Requirements

- Windows 10 build 1607 or newer (64 bit only) or equivalent Windows Servers OS
- 2.0 GHz processor or faster
- 250 MB drive space needed for install
- 8 GB ram or greater
- Microsoft SQL Server 2016 (Express edition included)
- Ethernet TCP/IP connection to check weighing devices
- A supported web browser (Apple Safari, Google Chrome, Microsoft Edge, Mozilla Firefox)

2.0 Installation and Configuration

2.1 Installation Instructions

1. Download WeighVault software, and if necessary, unzip the file.



Note Typically a download link is supplied with the purchase of software.

2. Launch **WeighVaultForCounterpart.Installer.exe**.
3. Follow on-screen prompts to complete installation.



Note After activation, the executable file distributes the application and all required prerequisites on the system. If an error occurs during the installation or database setup, the information is written to the **installlog.txt** file located in the root folder of the C:\ drive.

2.2 Post Installation Configuration

After WeighVault for Counterpart is installed, Microsoft® Internet Information Services (IIS) must be installed and configured. For information on installing Windows features and software, consult Windows help.

1. To install required Windows system components, perform one of the following:



Note *Step A uses an optional shortcut to add Windows system components opposed to the manual process outlined in Step B.*

- A. Run the **WeighVault-dism-win10.cmd** script (from the installation package) as an Administrator.
- B. In Windows Search enter “**Turn Windows Features on or off**” and select the **Option** that displays.

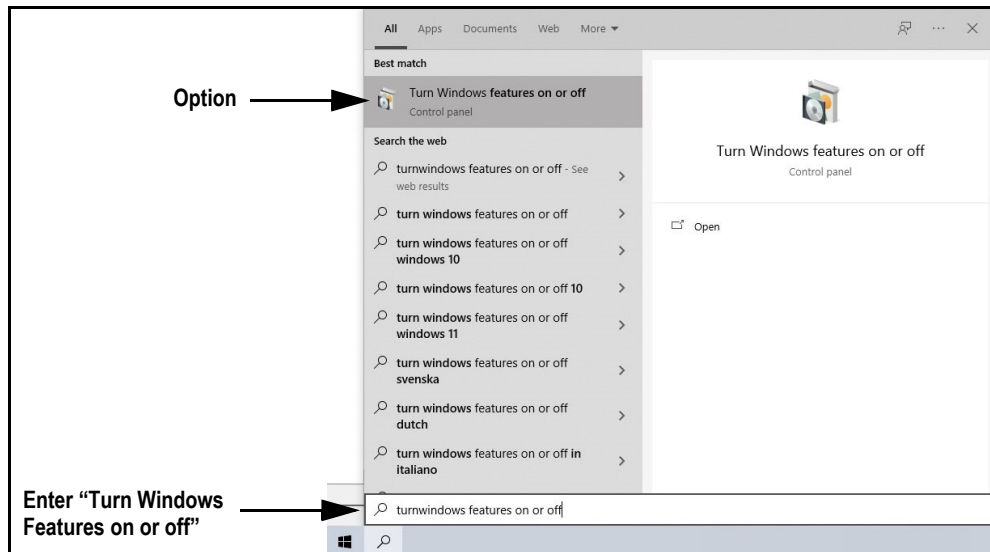


Figure 2-1. Search for Turn Windows Features On or Off

- B.1 Windows Features window displays (see [Figure 2-3 on page 4](#)).

- B.2 Expand **Internet Information Services** tree and enable check boxes as displayed in [Figure 2-2](#).
- B.3 Click **OK**.

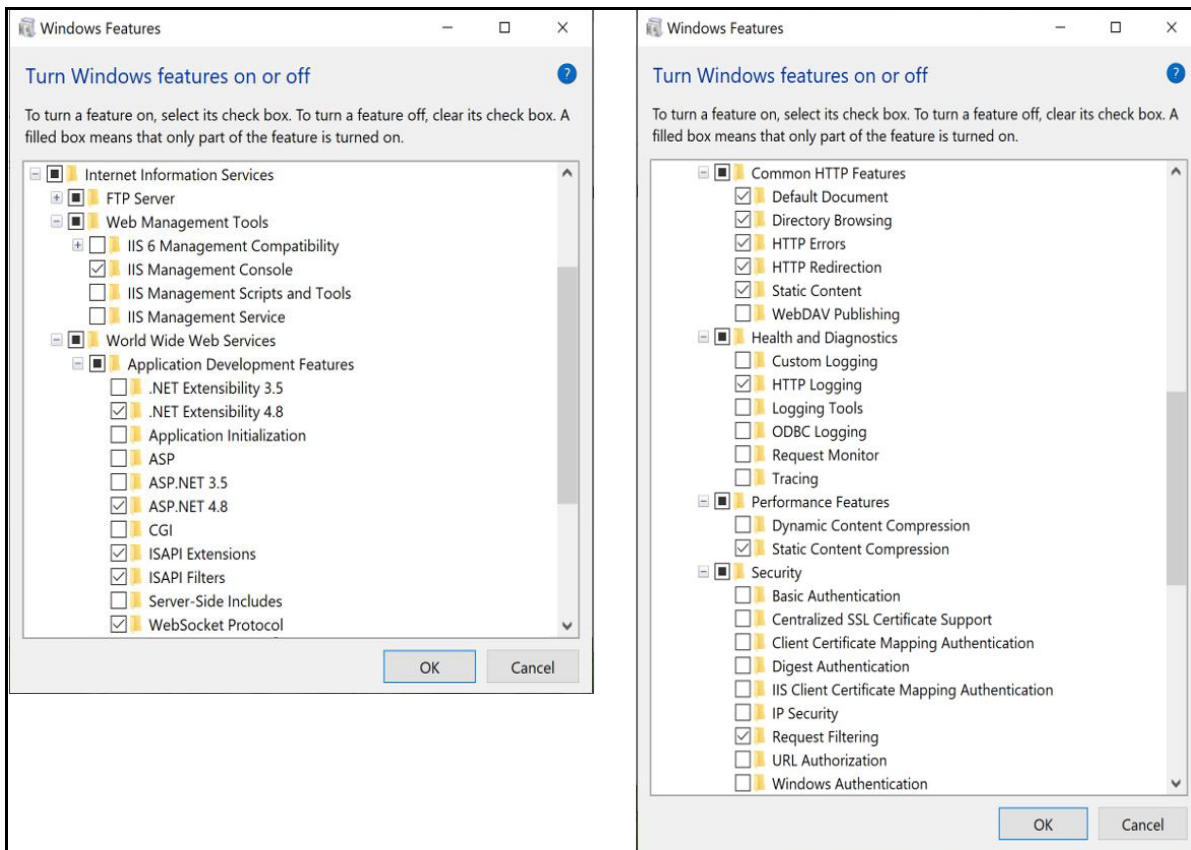


Figure 2-2. Windows Features Configured

3. Download and install the following software:
 - IIS URL Rewrite Extension: <https://www.iis.net/downloads/microsoft/url-rewrite>
 - IIS Request Routing Extension: <https://www.iis.net/downloads/microsoft/application-request-routing>
4. To configure IIS as a Reverse Proxy for the WeighVault for Counterpart application:
 - 4.1 Launch the **Internet Information Services (IIS) Manager** from the Start menu.
 - 4.2 Click the **Default Web Site** in the left column then double-click **URL Rewrite**.

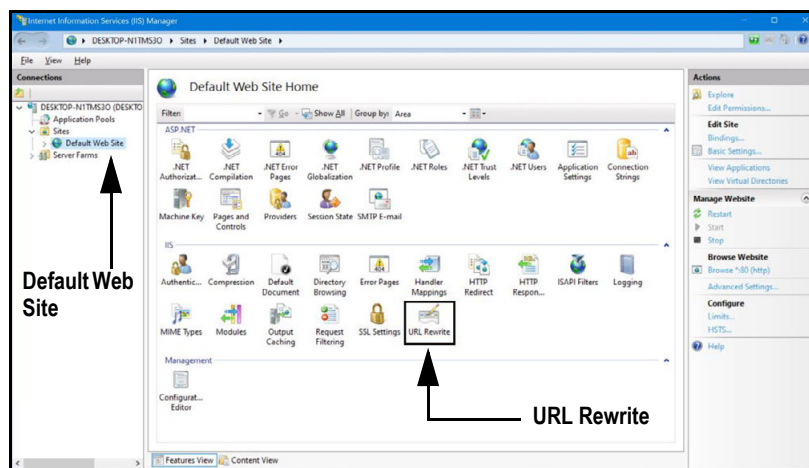


Figure 2-3. Internet Information Services Manager

4.3 Select the **Add Rule(s)** in the right column.

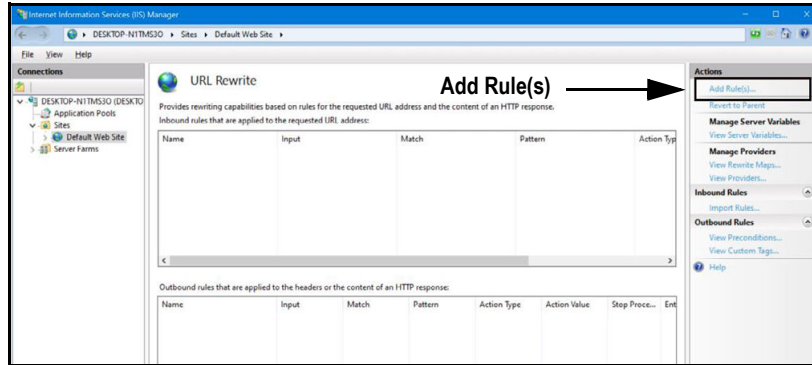


Figure 2-4. Internet Information Services Manager with Add Rule(s) Identified

4.4 The Add Rule(s) window displays.

4.5 Select the **Reverse Proxy** item in the Inbound and Outbound Rules section then click **OK**.

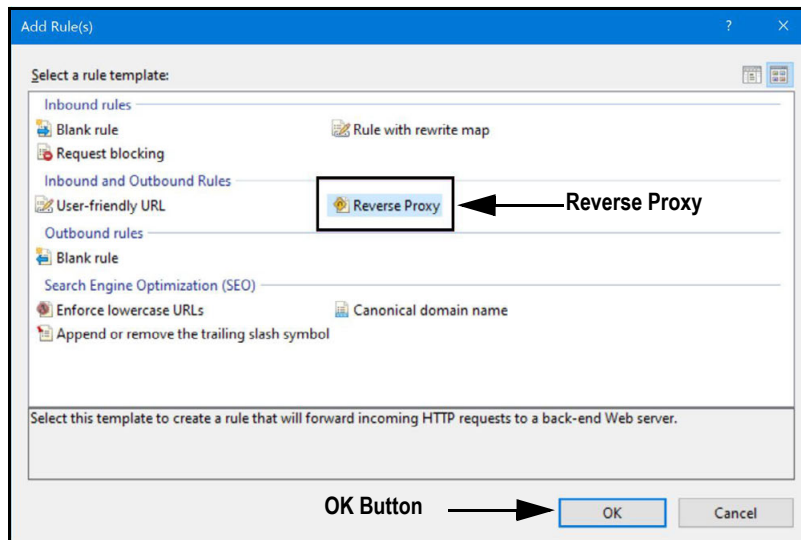


Figure 2-5. Add Rules Window with Reverse Proxy Identified

4.6 A warning may appear requesting to Enable Proxy Functionality.

4.7 Click **OK**.

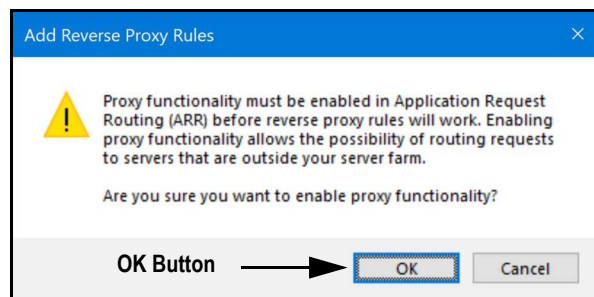


Figure 2-6. Add Reverse Proxy Rules Confirmation Window

- 4.8 Then Add Reverse Proxy Rule Window displays.
- 4.9 Enter the IP address: **127.0.0.1:5000**, to configure IIS to forward requests to the Counterpart application.
- 4.10 Activate **Enable SSL Offloading**, to process HTTPS traffic.
- 4.11 Ensure the **Outbound Rules** is not configured.
- 4.12 Click **OK** to apply the rule.

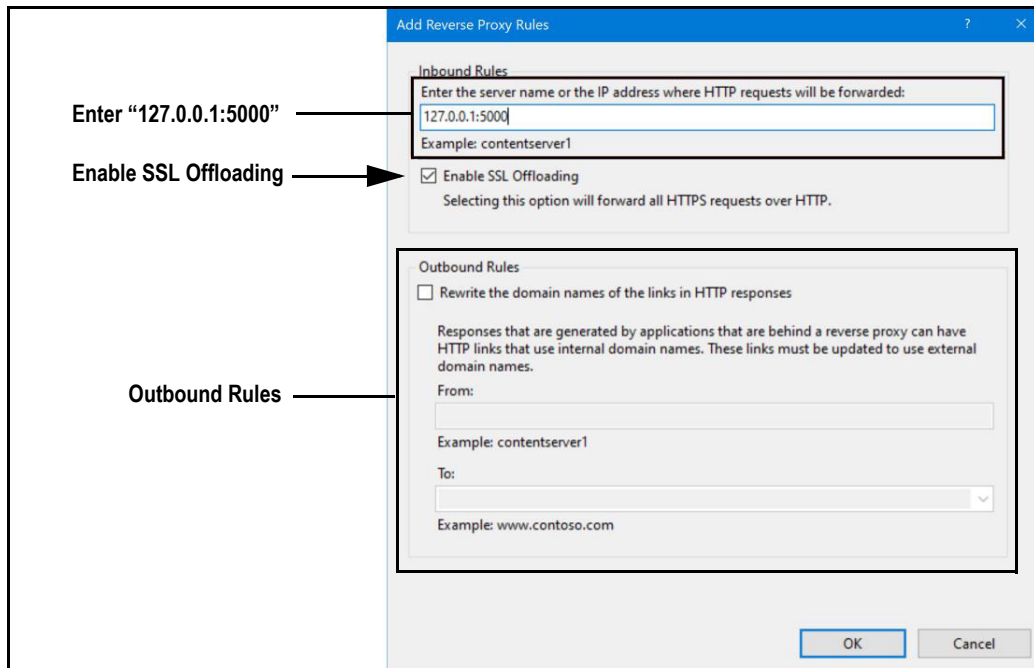


Figure 2-7. Add Reverse Proxy Rules Window with Elements Identified

- 4.13 Once complete, navigate to **WeighVault.localhost** (with a supported web browser) to open the Counterpart application. See [Section 3.3 on page 14](#) for information about logging in the time first as an administrator.

2.3 Configuring WeighVault with an Existing Website Hosted at Localhost

If a website is currently installed on the computer (hosted at localhost), the following steps can be followed to configure IIS to create a different URL:

1. Launch Internet Information Services (IIS) Manager from the Start menu.
2. Remove the reverse proxy rule if added to the default website.
3. To add the proxy site **WeighVault.localhost**:
 - 3.1 Right-click the **Sites** folder in the left panel and select **Add Website**.

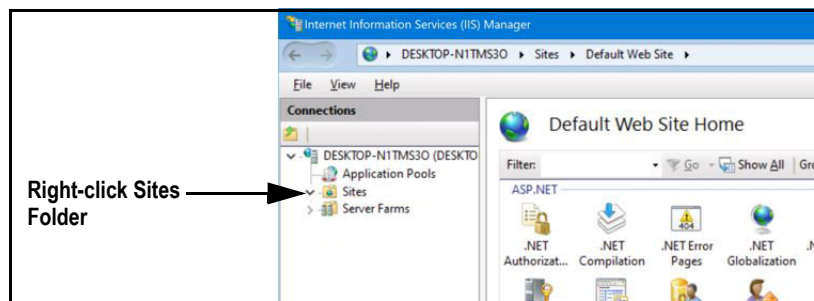


Figure 2-8. Internet Information Services Manager with Sites Folder Identified

- 3.2 The Add Website window displays.
- 3.3 Enter **WeighVault.localhost** as the Site and Host names.
- 3.4 Set the Physical path to a folder called WeighVault located in the following directory:
C:\inetpub\wwwroot\WeighVault
- 3.5 Click **OK**.

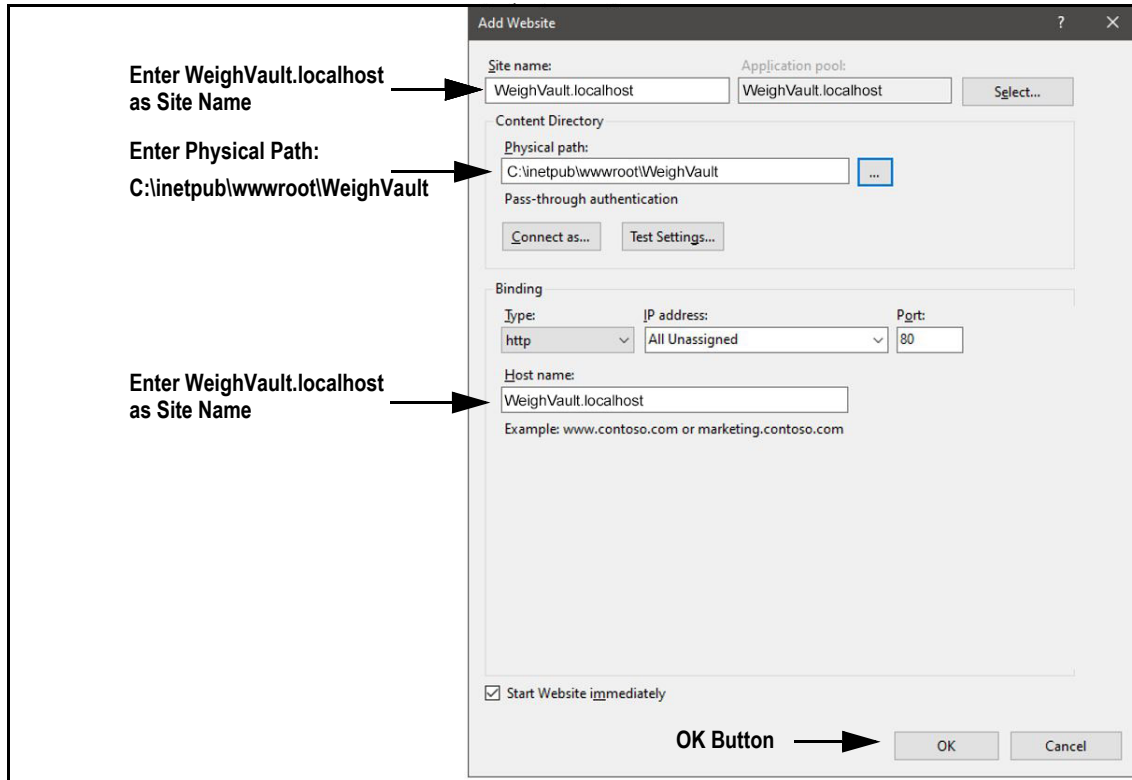


Figure 2-9. Add Website Window with Elements Identified

4. To configure IIS as a Reverse Proxy for WeighVault.localhost:
 - 4.1 Click the **Default Web Site** in the left column then double-click **URL Rewrite**.

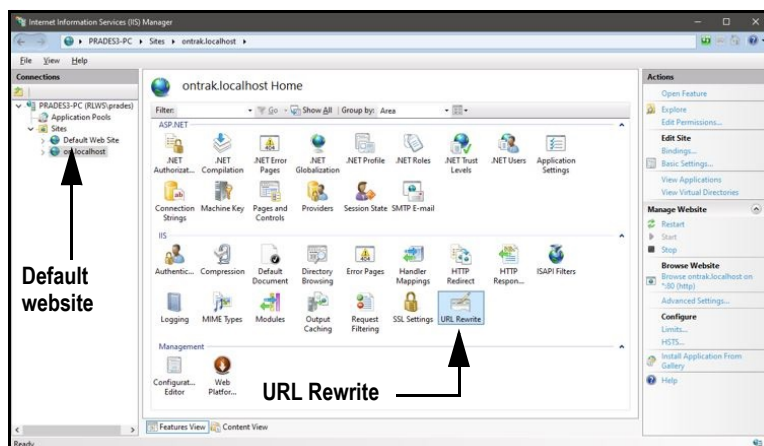


Figure 2-10. Internet Information Services Manager with URL Rewrite Identified

4.2 Click **Add Rule(s)** from the right column.

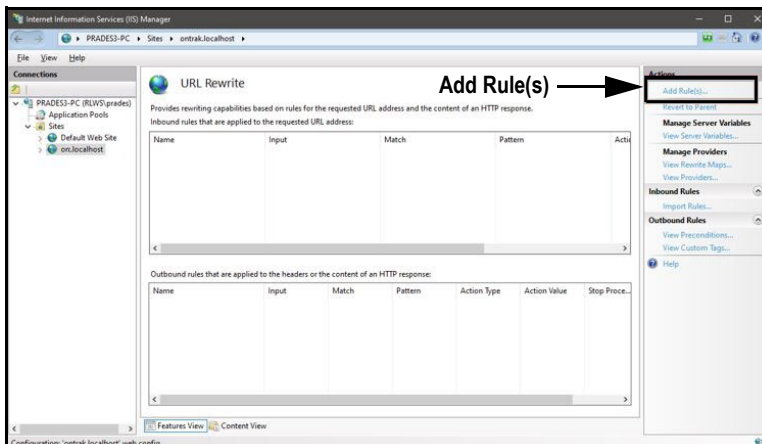


Figure 2-11. Internet Information Services Manager with Add Rule(s) Identified

4.3 Click **Reverse Proxy** in the Inbound and Outbound Rules section.

4.4 Click **OK**.

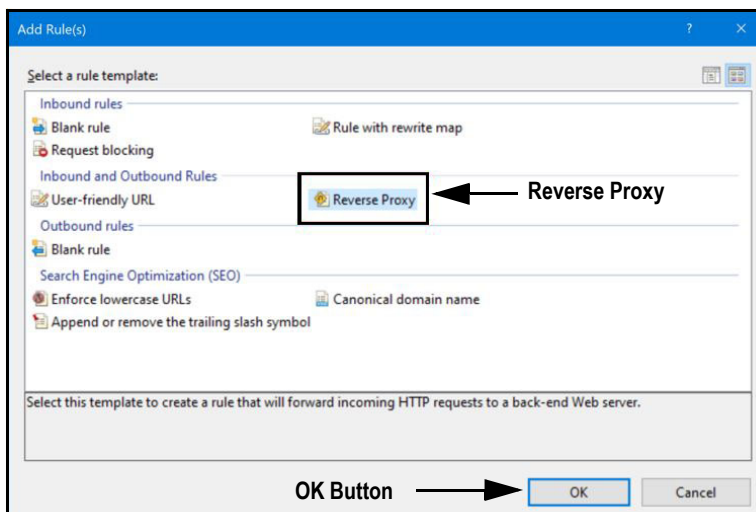


Figure 2-12. Add Rule(s) Window with Reverse Proxy Identified

4.5 A warning may appear requesting to Enable Proxy Functionality.

4.6 Click **OK**.

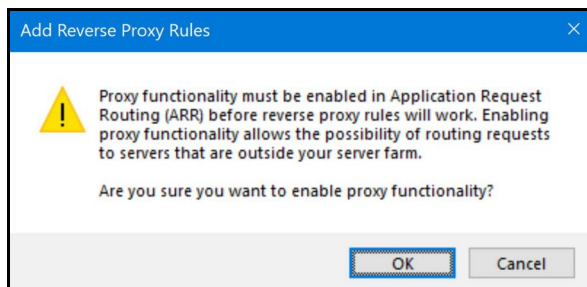


Figure 2-13. Add Reverse Proxy Rules Confirmation Window

- 4.7 The Add Reverse Proxy Rules window displays allowing configuration of the new rule.
- 4.8 To configure IIS to forward requests to the Counterpart application, enter the IP address: **127.0.0.1:5000**.
- 4.9 To process HTTPS traffic, ensure **Enable SSL Offloading** is enabled.
- 4.10 Ensure the **Outbound Rules** is not configured.
- 4.11 Click **OK** to apply the rule.

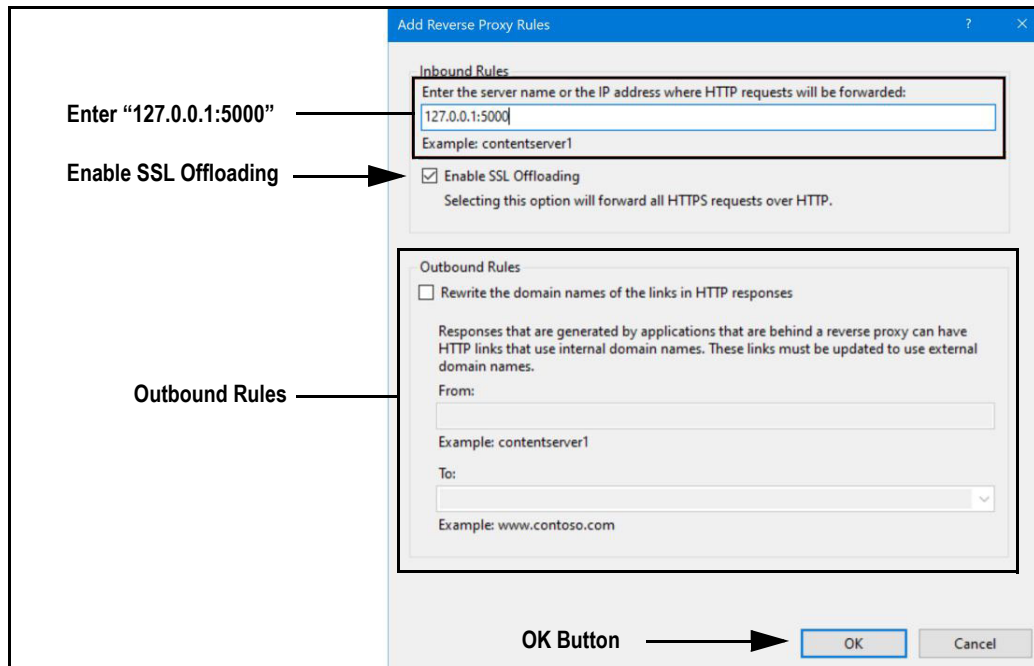


Figure 2-14. Add Reverse Proxy Rules Window with Elements Identified

- 4.12 Once complete, navigate to **WeighVault.localhost** (with a supported web browser) to open the Counterpart application. See [Section 3.3 on page 14](#) for information about logging in the time first as an administrator.

2.4 Systems Configuration

Low-level system configuration is typically done at the time of installation. These parameters are configured by editing the appsettings.json file using a text editor. Unless changed during installation, the file is located in the application installation folder:

C:\Program Files\Rice Lake Weighing Systems\WeighVaultForCounterpart\

Open appsettings.json with a text editor such as Notepad with administrator privileges. Make required changes and save the file. Restart the computer for the changes to take effect.

2.4.1 Email Server Parameters

Configure the email server parameters to enable account confirmation, account recovery, and other email related features. Figure 2-15 displays an example of email server parameter.

```
"EmailOptions": {
  "Enabled": false,
  "MailServer": "",
  "MailPort": 587,
  "SenderName": "WeighVault-Counterpart",
  "FromAddress": "",
  "Sender": "",
  "Password": "",
  "EnableSsl": true
}
```

Figure 2-15. Email Server Parameters

Parameter	Description
Enabled	Set to True to enable, or False to disable
MailServer	The name or IP Address of the SMTP email server. Obtain this information from email provider or the IT department. Leave blank to disable email functionality
MailPort	The TCP port used by the mail server. Obtain this information from the mail provider or the IT department
SenderName	The display name of the sender
FromAddress	The email address of the sender
Sender	The account name used for authentication on the email server. This is typically an email address
Password	The account password
EnableSsl	Set to true or false to configure secure sockets layer encryption when authenticating and sending email messages. This information can be obtained from the email provider or IT department. The default value is true

Table 2-1. Email Parameters Descriptions

2.4.2 Indicator Server Options

Setup the indicator parameters to enable interfacing, maximum device connections, communication configuration and remote updates. [Figure 2-16](#) displays an example of indicator server parameter.

```
"IndicatorServerOptions": {
  "Enabled": true,
  "TcpPort": 5466,
  "MaxConnections": 25,
  "CloseAfterProtocolResponse": false,
  "AllowRemoteUpdates": false
}
```

Figure 2-16. Indicator Server Parameters

Parameter	Description
Enabled	Set to True to enable, or False to disable
TcpPort:	Configures the TCP port used to receive communications from Counterpart devices. This is typically configured as 5466
MaxConnections:	Configures the maximum number of simultaneous connections allowed from Counterpart devices. The default is 25. The maximum quantity of connections is dependent on server memory and CPU usage
CloseAfterProtocol Response:	Configures if the server force closes connection after communications are completed. Set to True to enable, or False to disable. The default value is False. This allows additional device communications without increasing the Max Connections parameter. Set to false to maintain the connection. Maintaining the connection can reduce the amount of time each command and response sequence occurs
AllowRemote Updates:	Configures whether device operators are permitted to make changes to the product information and send the changes to the server and the server database. Set to True to enable, or False to disable. Default is False. When disabled, forces all changes to be made using the web application

Table 2-2. Indicator Sever Parameters Descriptions

3.0 Navigation and Page Elements

This section discusses WeighVault navigation, pages and page elements that may display during normal use.

Topics in this section include:

- Access WeighVault (Section 3.1)
- Account Creation (Section 3.2 on page 13)
- Login (Section 3.3 on page 14)
- Reset Password (Section 3.4 on page 15)
- Menus (Section 3.5 on page 16)
- WeighVault Pages (Section 3.6 on page 18)
- Account Management (Section 3.7 on page 24)
- Logout (Section 3.8 on page 28)

3.1 Access WeighVault

WeighVault may be accessed from a supported web browser (see Section 1.1 on page 2). Perform the following to access WeighVault:

1. There are two options for accessing WeighVault, depending on configuration:
 - If using the computer where the WeighVault application was installed, navigate to: <http://localhost>
 - If WeighVault is configured to work with an existing default website, navigate to: WeighVault.localhost



Note Figure 3-1 illustrates WeighVault opened in Microsoft Edge.

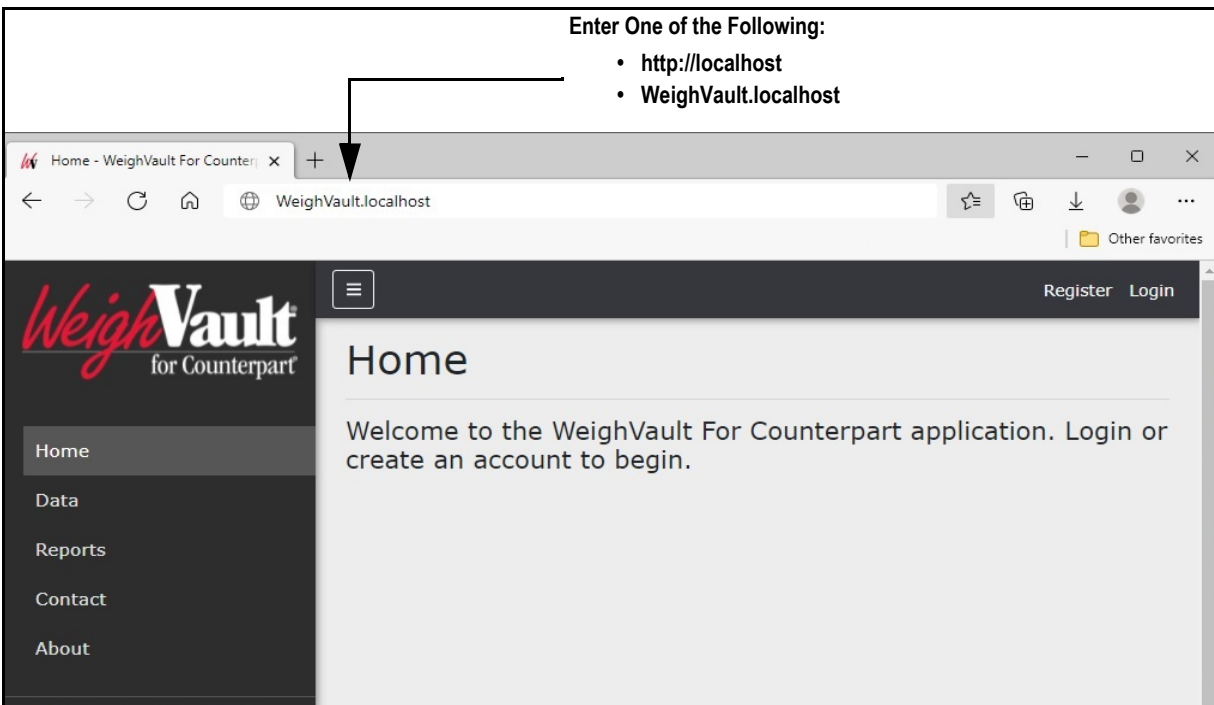


Figure 3-1. WeighVault Opened In Microsoft Edge

3.2 User Account Registration

A user account is required to access and use WeighVault. Perform the following to create a user account:

1. Access WeighVault (see [Section 3.1 on page 12](#)).
2. Click **Register**.

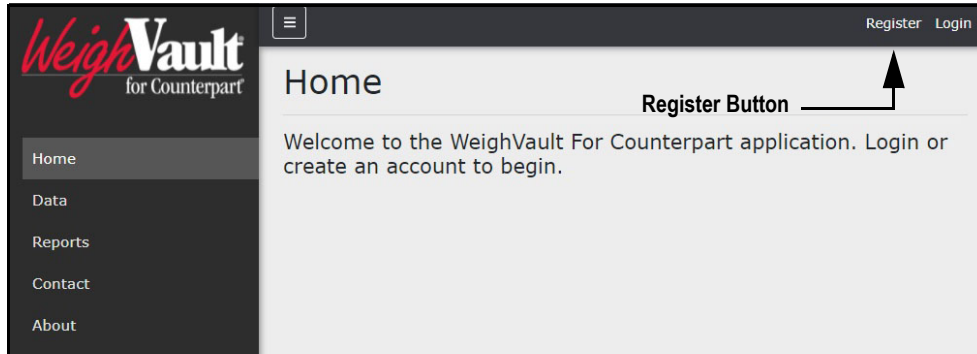


Figure 3-2. WeighVault Home Page

3. Enter email address into Email field.
4. Enter desired password into Password and Confirm password fields.



Note

Passwords must have at least six characters, one non alphanumeric character (!@#\$\$%^&*), one lowercase (a-z) character, one uppercase character (A-Z) and one number (0-9).

5. Click **Register**.



Note

After account is created, the Administrator must set a user role otherwise access to features is denied (see [Section 4.2 on page 30](#)).



Figure 3-3. WeighVault Account Registration Page

3.3 Login



Note

To perform all site operations, the system creates an administrator account titled “admin@localhost.”

The default password for the account is randomly generated. The password is stored in the initialAdminPassword.txt file located in the following installation folder:

C:\Program Files\Rice Lake Weighing Systems\WeighVault for Counterpart\secrets\initialAdminPassword.txt

Open this file to view the current password. After the first login, the site will redirect to the Change Password page to configure your preferred administrator password.

1. Access WeighVault (see Section 3.1 on page 12).
2. Click **Login**.

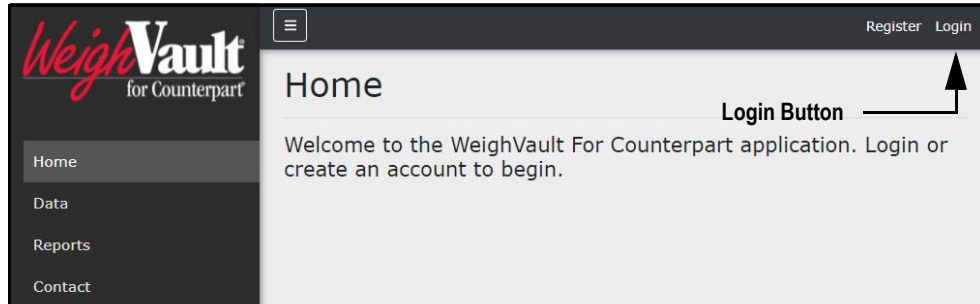


Figure 3-4. Login Button

3. Enter email and password in the text fields.
4. Click **Log In**.

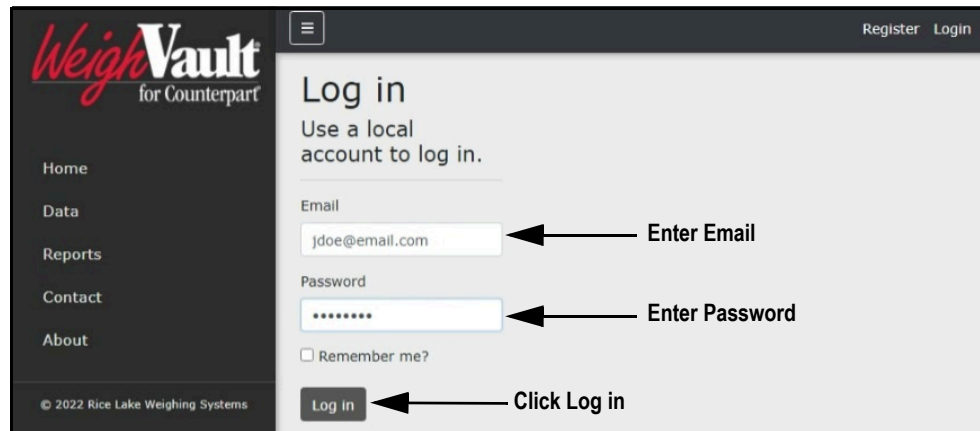


Figure 3-5. Login Prompt

5. When logged in WeighVault, the user account email address displays adjacent to the Logout button.

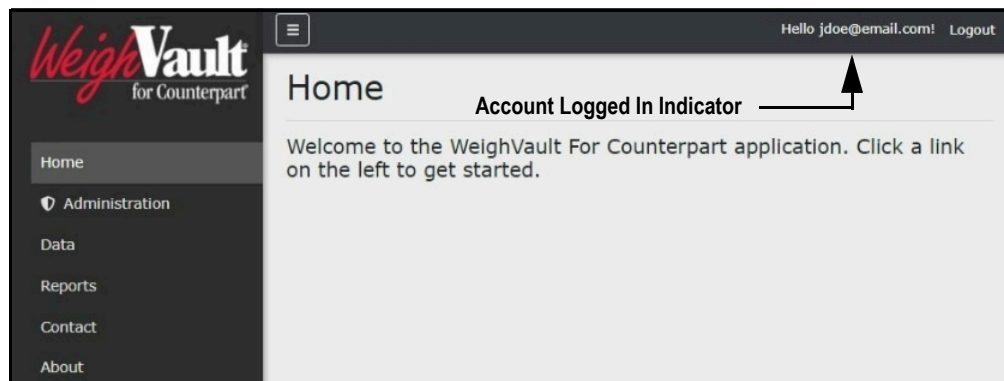


Figure 3-6. Account Logged In

3.4 Reset Password

IMPORTANT

In order to reset a password, an email server must be configured (see [Section 2.4.1 on page 10](#)). If an email server is not configured, reset password emails are not generated and consequently forgotten passwords are not reset.

1. Access WeighVault (see [Section 3.1 on page 12](#)).
2. Click **Forgot your password?**.

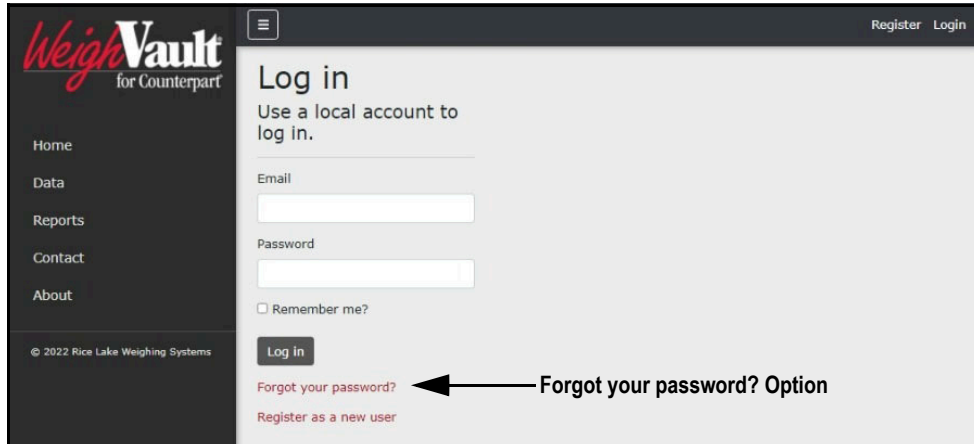


Figure 3-7. Login Prompt with Forgot your password Option Identified

3. Enter email address associated with the account.
4. Click **Submit**.

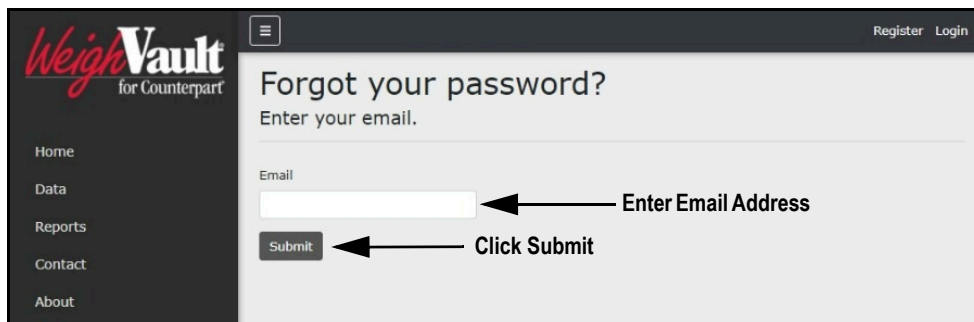


Figure 3-8. Forgot Your Password Page

5. After clicking Submit, WeighVault indicates the password reset information is sent to the specified email address.

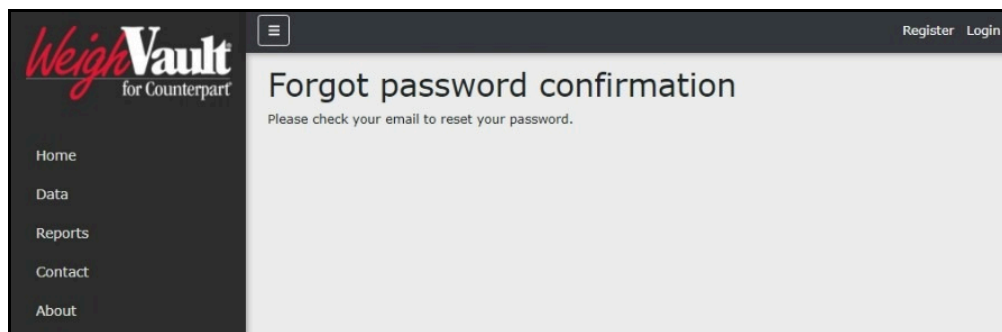


Figure 3-9. Forgot Password Confirmation Page

6. Open email and follow instructions to complete password reset process.

3.5 Menus

3.5.1 Main Menus and Options

WeighVault has several elements available on every page that facilitate operation. Each element is identified in [Figure 3-10](#).



Note If the Main menu (left column) is not currently available, verify if it is hidden (see [Section 3.5.2 on page 17](#)).

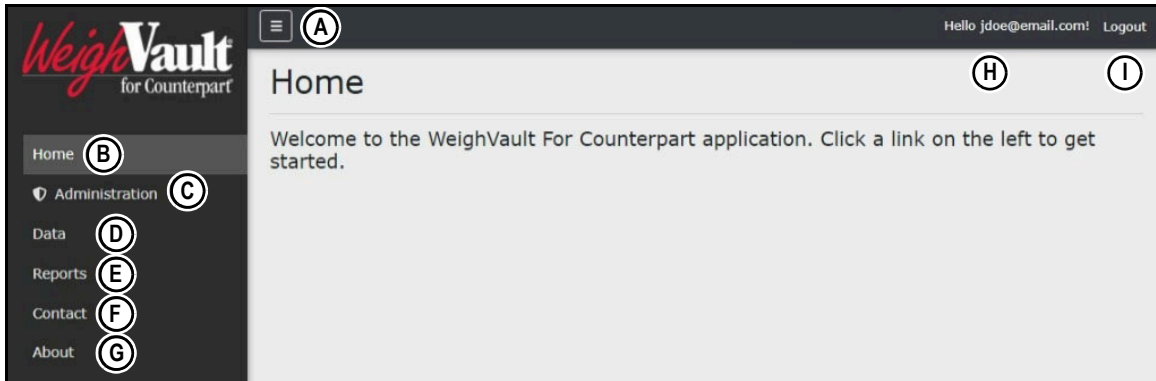


Figure 3-10. WeighVault Elements

Elements identified in [Figure 3-10](#) are described in the [Table 3-1](#):

Item	Function	Description
A	Menu Button	Collapses or expands the Main menu (see Section 3.5.2 on page 17)
B	Home Option	Opens Home page and displays welcome message (see Section 3.6.1 on page 18)
C	Administration Option	Opens Administration page, which provides access to user configuration, log files and viewing server settings (see Section 3.6.2 on page 18)
D	Data Option	Opens Data page which provides access to Parts option (see Section 3.6.3 on page 20)
E	Reports Option	Opens Reports page which provides generation of four reports (Part, Inventory, Location and Activity) (see Section 3.6.4 on page 21)
F	Contact Option	Opens Contact Information for Rice Lake Weighing Systems (see Section 3.6.5 on page 23)
G	About Option	Opens About page which provides version and build information for WeighVault (see Section 3.6.6 on page 23)
I	Account Option	Opens Account Management page which provides the functionality to change information for the active account (see Section 3.7 on page 24)
H	Logout Option	Logs out of WeighVault (see Section 3.8 on page 28)

Table 3-1. WeighVault Element Descriptions

3.5.2 Hiding and Displaying Menus

It is possible to hide and display the Main menu (left column in WeighVault). Perform the following to hide the Main Menu.

1. While the Main menu is open, select the **Menu** button to hide it.



Figure 3-11. Home Page with Menu Button Identified

2. The Main menu hides.

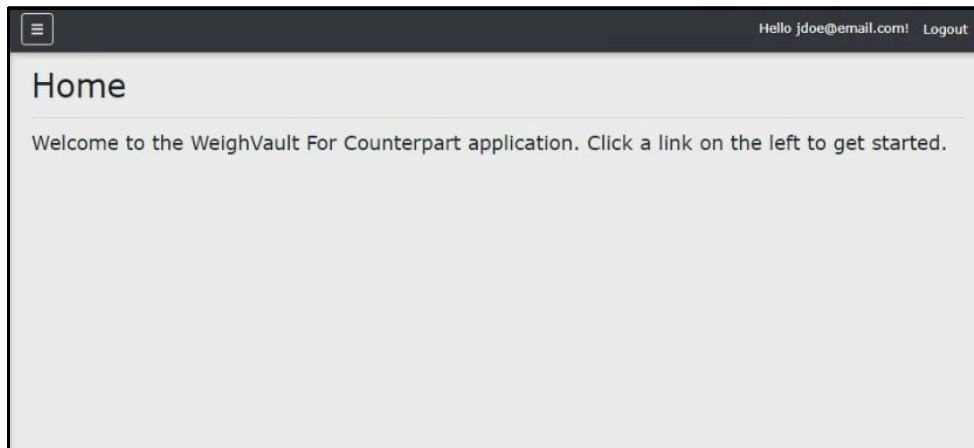



Figure 3-12. Home Page with Menu Collapsed

3. Select  (menu button) again to display the Main menu.

3.6 WeighVault Pages

WeighVault has six pages accessed from the Main menu (see [Section 3.5.1 on page 16](#)) that facilitate operation:

- Home page (see [Section 3.6.1](#))
- Administration page (see [Section 3.6.2](#))
- Data page (see [Section 3.6.3 on page 20](#))
- Reports page (see [Section 3.6.4 on page 21](#))
- Contact page (see [Section 3.6.5 on page 23](#))
- About page (see [Section 3.6.6 on page 23](#))

3.6.1 Home Page

The Home page serves as a welcome page. When connecting to web page initially the home page is automatically opened.

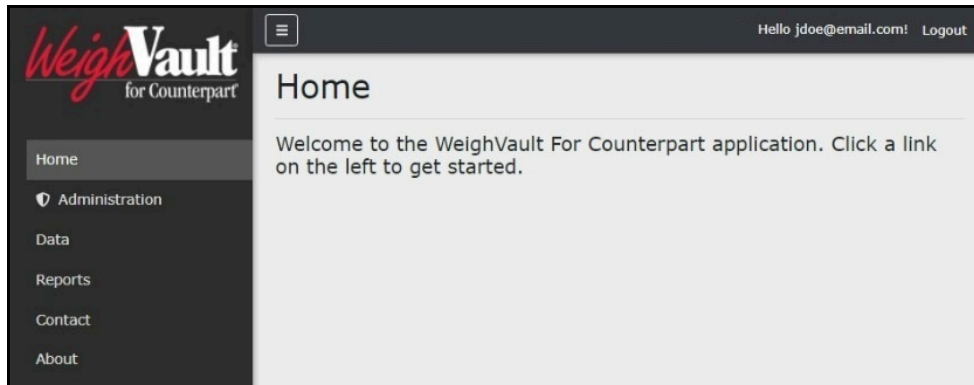


Figure 3-13. Home Page Elements

3.6.2 Administration Page

The Administration page is selected from the Main menu and displays three page buttons that provide administrative functions. For more information, see [Section 4.0 on page 29](#).



Note The Administration page, sub-pages, and functions are only available to WeighVault administrators.

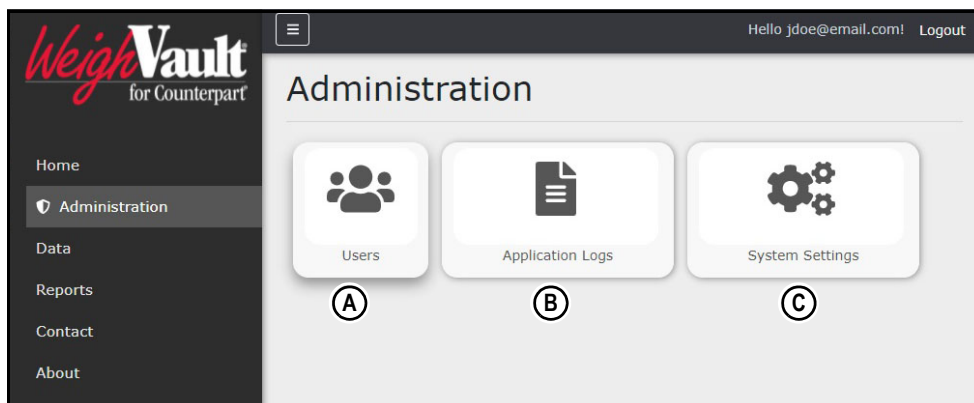


Figure 3-14. Administration Page Elements

Elements identified in [Figure 3-14](#) are described in the [Table 3-2](#):

Item	Feature	Description
A	Users	Provides administrator configuration functions to add, edit or delete users
B	Application Logs	Opens the Application Logs page. Allows viewing and downloading of log files
C	System Settings	Opens System Settings page (see Section 3.6.2.3 on page 20) which provides a list of system settings

Table 3-2. Administration Page Elements Described

3.6.2.1 Users Page

The Users page is accessed by selecting **Users** in the Administration page. It displays a list of WeighVault Users and provides functionality to add, edit and delete users.



Note The Administration page, sub-pages, and functions are only available to WeighVault administrators.

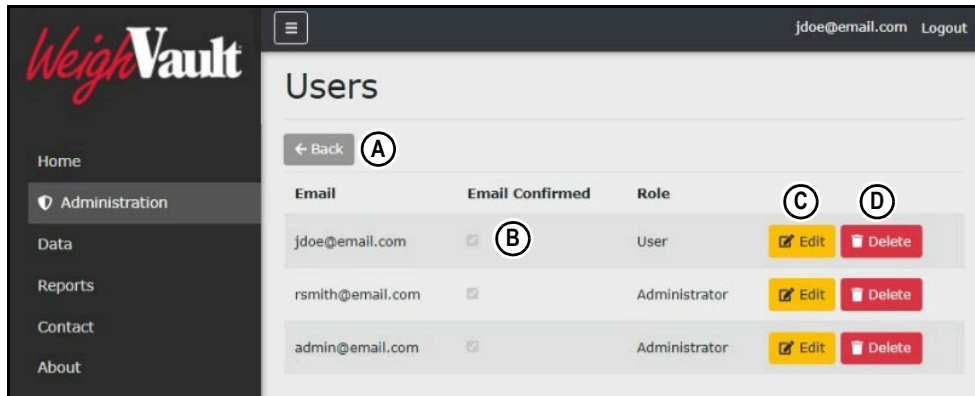


Figure 3-15. Users Page Elements

Elements identified in Figure 3-15 are described in the Table 3-3:

Item	Feature	Description
A	Back Button	Returns to the previous page
B	Email Confirmed	Indicates that the email provided by the user has been confirmed
C	Edit Button	Opens the Edit User page (see Section 4.2.1 on page 30)
D	Delete Button	Deletes the user (see Section 4.2.2 on page 32)

Table 3-3. Users Page Elements Described

3.6.2.2 Application Logs Page

The Application Logs page is accessed by selecting **Log Files** in the Administration page. The Application Logs page lists available JavaScript Object Notation (*.json) log files with dates as the file names.



Note The Administration page, sub-pages, and functions are only available to WeighVault administrators.

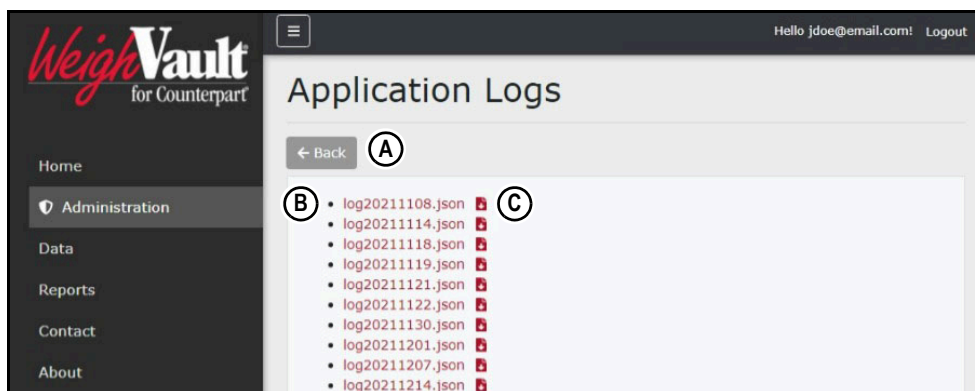


Figure 3-16. Application Logs Page Elements

Elements identified in Figure 3-16 are described in the Table 3-4:

Item	Feature	Description
A	Back Button	Returns to previous page.
B	Log File Link	Opens log file in internet browser (see Section 4.3 on page 33)
C	Download Button	Downloads log file (see Section 4.3 on page 33)

Table 3-4. Application Logs Page Elements Described

3.6.2.3 System Settings Page

The System Settings page is accessed by selecting **Server Settings** in the Administration page. The System Settings page provides information on how the system is currently configured.



The Administration page and its functions are only available to WeighVault administrators.

The settings that display in this page are a reflection of parameters configured in [Section 2.4 on page 10](#).

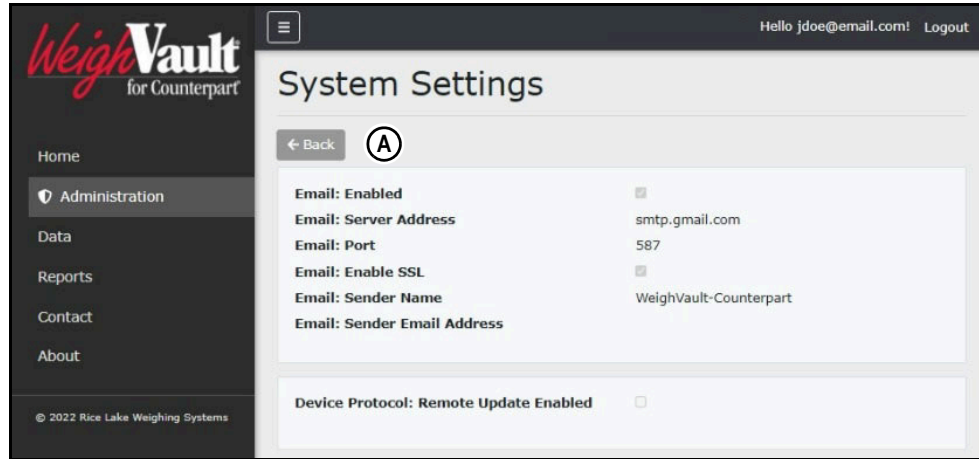


Figure 3-17. System Settings Page Elements

Elements identified in [Figure 3-17](#) are described in the [Table 3-5](#):

Item	Feature	Description
A	Back	Returns to previous page

Table 3-5. System Settings Page Elements Described

3.6.3 Data Page

The Data page is selected from the Main menu and displays one button that provide parts management functions. For more information, see [Section 5.0 on page 34](#).

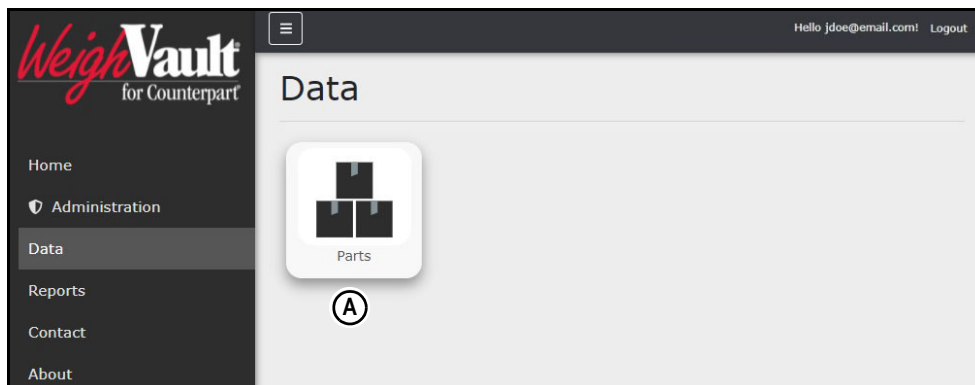


Figure 3-18. Data Page Elements

Elements identified in [Figure 3-18](#) are described in [Table 3-6](#):

Number	Feature	Description
1	Parts	Opens Parts page. Allows user to configure parts in database.

Table 3-6. Asset Details Page Elements Described

3.6.3.1 Parts Page

The Parts page is accessed by selecting Parts in the Data page. The Parts page provides functionality to add, edit and delete parts.

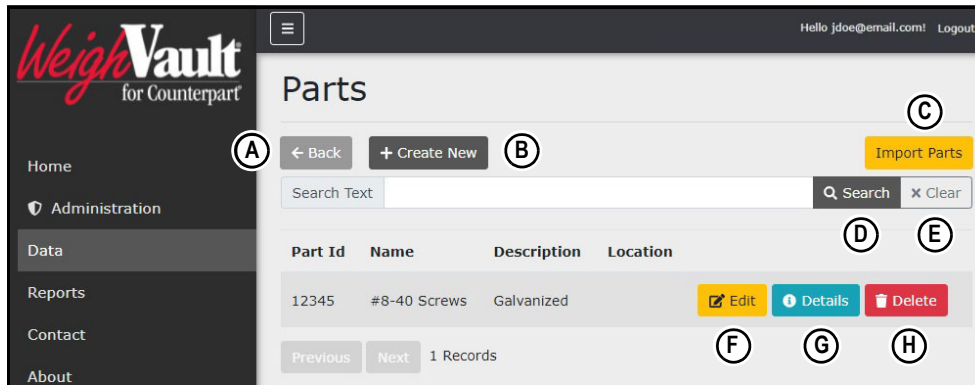


Figure 3-19. Part Page Elements

Elements identified in Figure 3-19 are described in the Table 3-3:

Item	Feature	Description
A	Back Button	Returns to previous page
B	Create New Button	Opens Create Part page. Allows user to create a new part in database (see Section 5.2 on page 35)
C	Import Parts Button	Opens Import Parts window. Allows user to bulk import parts from a user configured text file (see Section 5.6 on page 40)
D	Search	Searches parts database for keywords
E	Clear	Clears search
F	Edit Button	Opens Edit Part page. Allows user to edit part information (see Section 5.3 on page 37)
G	Details Button	Opens Part Details page. Allows user to review part information (see Section 5.4 on page 38)
H	Delete Button	Opens Delete Part page. Allows user to delete a part (see Section 5.5 on page 39)

Table 3-7. Users Page Elements Described

3.6.4 Reports Page

The Reports page is selected from the Main menu and displays four buttons that provide different report types. For more information, see Section 6.0 on page 47.

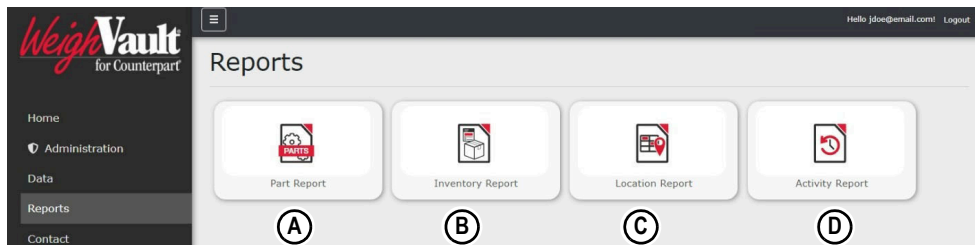


Figure 3-20. Reports Page Elements

Elements identified in Figure 3-20 are described in the Table 3-8:

Item	Feature	Description
A	Part Report	Lists all parts in database with their associated Part Id, Description, Name, Lot Number, Unit Weight, Tare Weight, Unit of Measure and Inventory
B	Inventory Report	Lists parts with inventory greater than zero (0). Each part includes Part Id, Name, Description and Inventory data points
C	Location Report	Lists all parts organized by their location. Each part includes Location, Part Id, Name, Description and Inventory data points. Note: Parts without a defined location are grouped together.
D	Activity Report	Lists parts with inventory activity in a specific date range. Each part includes Part Id, Unit Id, Request Date and Quantity

Table 3-8. Reports Page Elements Described

3.6.4.1 Reports

A report is accessed by selecting the type (Part, Inventory, Location or Activity) in the Reports page. Each report provides similar functionality to each other, while they differ in the type of data that is generated.

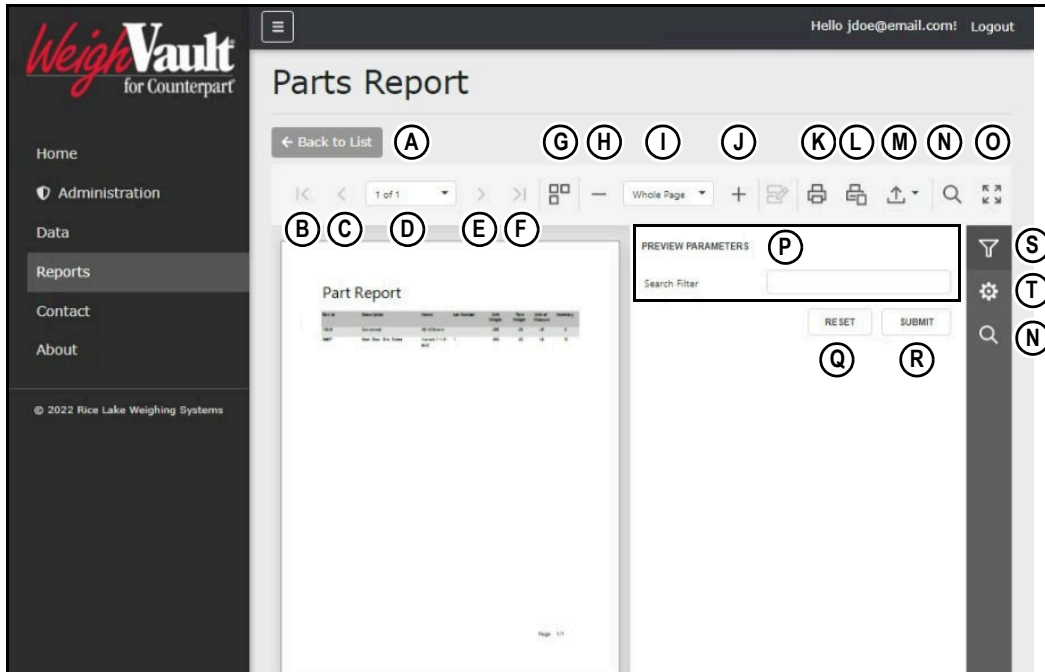


Figure 3-21. Report Elements

Elements identified in Figure 3-21 are described in the Table 3-9:

Item	Feature	Description
A	Back to List Button	Returns to previous WeighVault page
B	First page Button	Displays first report page
C	Previous page Button	Displays previous report page
D	User Selected Page Number Drop-Down	Displays active page selected by user
E	Next Page Button	Displays next report page
F	Last Page Button	Displays last report page
G	Multipage Mode Button	Toggles Multipage Mode
H	Zoom Out Button	Zooms report out
I	User Configured Zoom Level	Displays report in zoom level configured by user
J	Zoom In Button	Zooms report in
K	Print Button	Prints report. For more information, see Section 6.3 on page 51
L	Print Page Button	Prints active report page. For more information, see Section 6.3 on page 51
M	Export To Drop-down	Exports report to a user selected file type (*.pdf, *.xls, *.xlsx, *.rtf, *.docx, *.mht, *.html, *.txt, *.csv, *.png). For more information, see Section 6.4 on page 51
N	Search Button	Searches report for keywords and identifies them.
O	Full screen Button	Opens report in full screen
P	Search Parameters	User configurable parameters that determine report criteria that varies with report type. For more information, see Section 6.2.1 on page 49
Q	Reset Button	Clears search filter text field
R	Submit Button	Submits search parameters and initiates report generation
S	Parameters Button	Opens parameter menu
T	Export Options Button	Configures export options

Table 3-9. Report Elements Described

3.6.5 Contact Page

The Contacts page is selected from the Main menu and provides information regarding how to contact Rice Lake Weighing Systems.

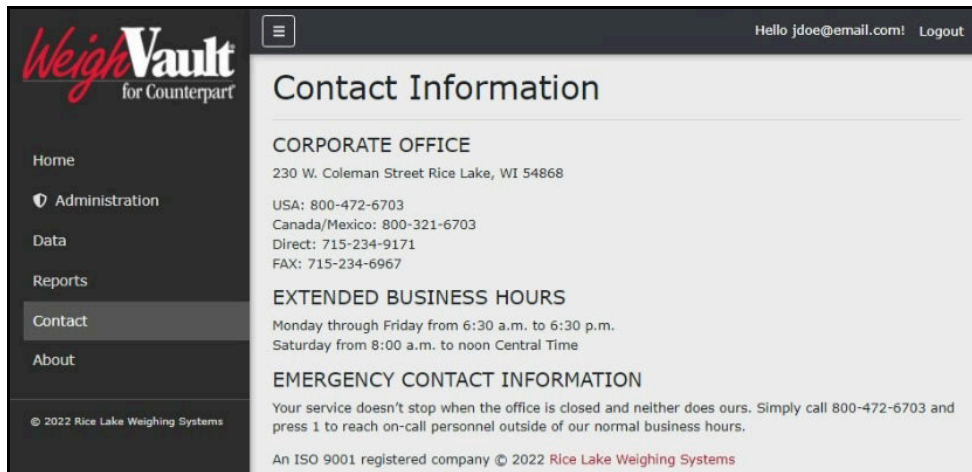


Figure 3-22. Contact Page Elements

3.6.6 About Page

The About page is selected from the Main menu and provides various information about WeighVault.

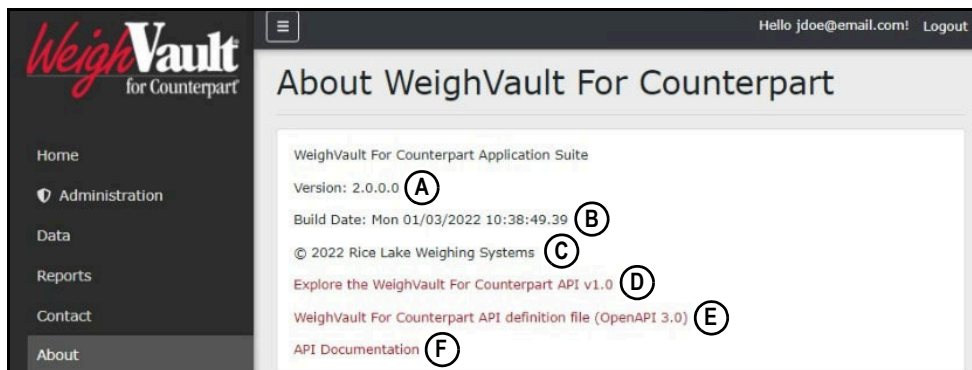


Figure 3-23. About Page Elements

Elements identified in Figure 3-23 are described in Table 3-10:

Item	Feature	Description
A	Version Display	Lists WeighVault version number
B	Build Date Display	Lists WeighVault version build date
C	Copyright	Provides copyright information
D	Explore the WeighVault for Counterpart API v1.0	Opens the API exploration page
E	WeighVault For Counterpart API definition file (OpenAPI 3.0)	Opens the API definition file
F	API Documentation	Accesses API documentation that is generated on demand

Table 3-10. About Page Elements Described

3.7 Account Management

Account management provides the following functions:

- Change Password (see [Section 3.7.1 on page 24](#))
- Download Personal Data (see [Section 3.7.2 on page 24](#))
- Delete Personal Data and Account (see [Section 3.7.3 on page 26](#))

3.7.1 Access Manage Your Account Page

Perform the following to access the Manage your account page:

1. Select the Account Email address (upper right corner).

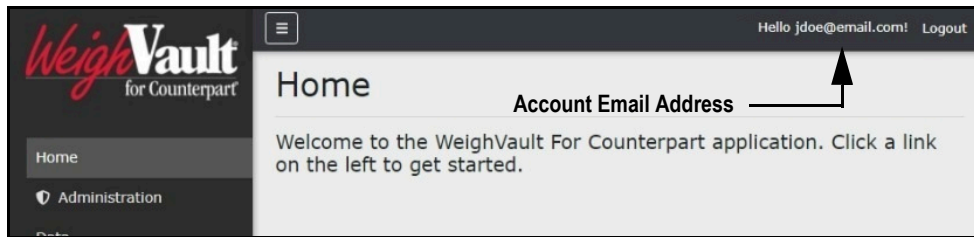


Figure 3-24. Account Settings Button

2. The Manage your account page displays.

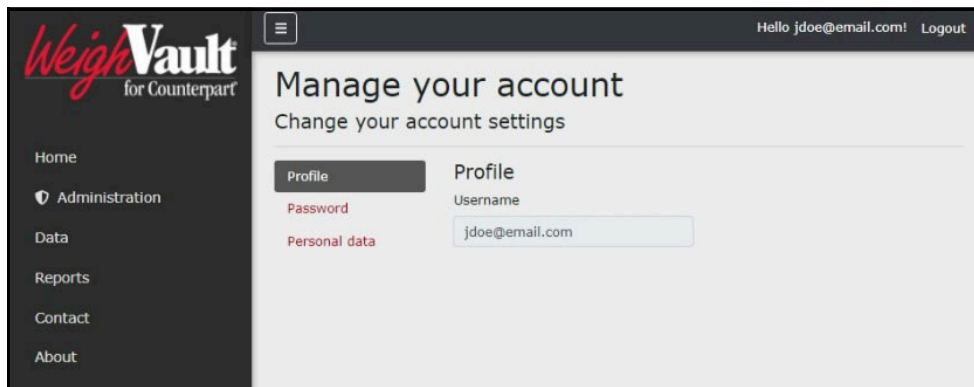


Figure 3-25. Manage Your Account Page

3.7.2 Changing Password

If required, a password may be changed for the active account. Perform the following to change a password:



Note

Passwords must have at least six characters, one non alphanumeric character (!@#\$\$%^&*), one lowercase (a-z) character, one uppercase character (A-Z) and one number (0-9).

1. Access Account management page (see [Section 3.7.1](#)).
2. Click **Password**.

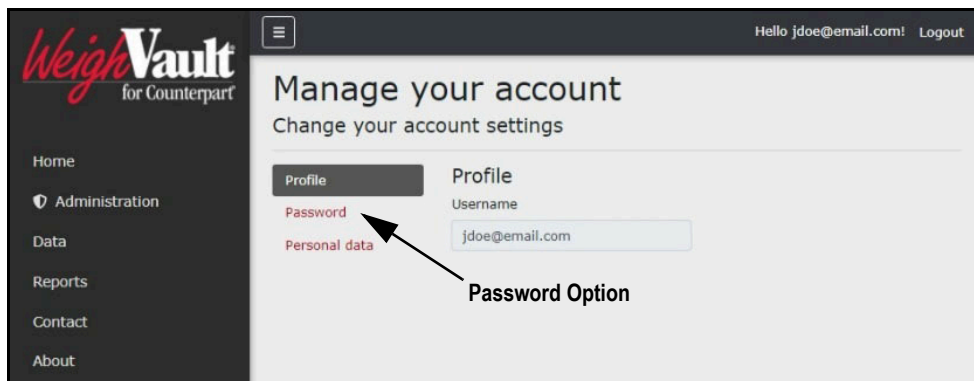


Figure 3-26. Manage Your Account Page

3. The Change Password page displays.
4. Enter current password.
5. Enter new password twice.
6. Click the **Update password** button to save the changes or click the internet browser's **Back** button to return to the previous page.

The screenshot shows the 'Manage your account' page for 'WeighVault for Counterpart'. The user is logged in as 'Hello jdoe@email.com!'. The page title is 'Manage your account' with the subtitle 'Change your account settings'. The 'Password' tab is selected. The 'Change password' section contains three input fields: 'Current password', 'New password', and 'Confirm new password'. An 'Update password' button is at the bottom. An arrow points to the 'Update password' button with the label 'Update password Button'. Another arrow points to the 'New password' field with the label 'Password Changed'.

Figure 3-27. Change Password Fields with Data

7. If the password was updated, the Manage your account page confirms the change.

The screenshot shows the same 'Manage your account' page. A green notification banner at the top of the 'Change password' section displays the message 'Your password has been changed.' with a close button (X). An arrow points to this message with the label 'Password Changed Confirmation'. The input fields and the 'Update password' button are still visible below the notification.

Figure 3-28. Password Changed Indicator

3.7.3 Personal Data

Each account contains information provided by the user including name and email address. The Personal Data page allows the user to download personal data or to delete personal data and account.

3.7.3.1 Download Personal Data

Perform the following to download personal data:

1. Access Account management page (see [Section 3.7.1 on page 24](#)).
2. Click **Personal Data**.

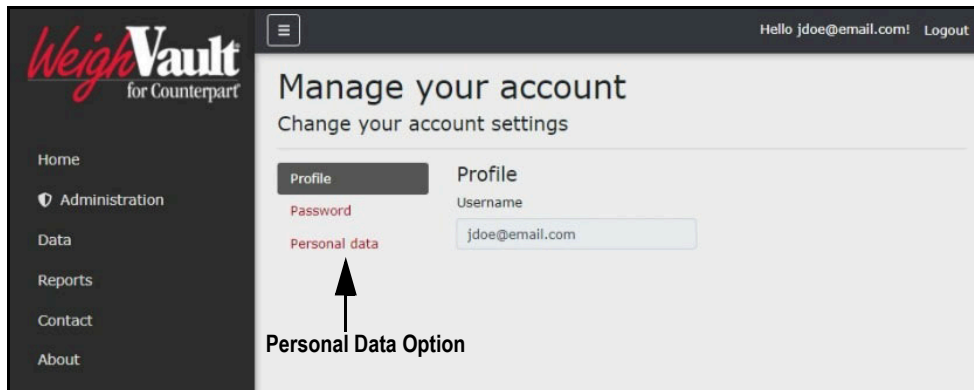


Figure 3-29. Manage Your Account Page

3. The Personal Data page displays.
4. To download data, click **Download** and follow internet browser prompts to save the data.

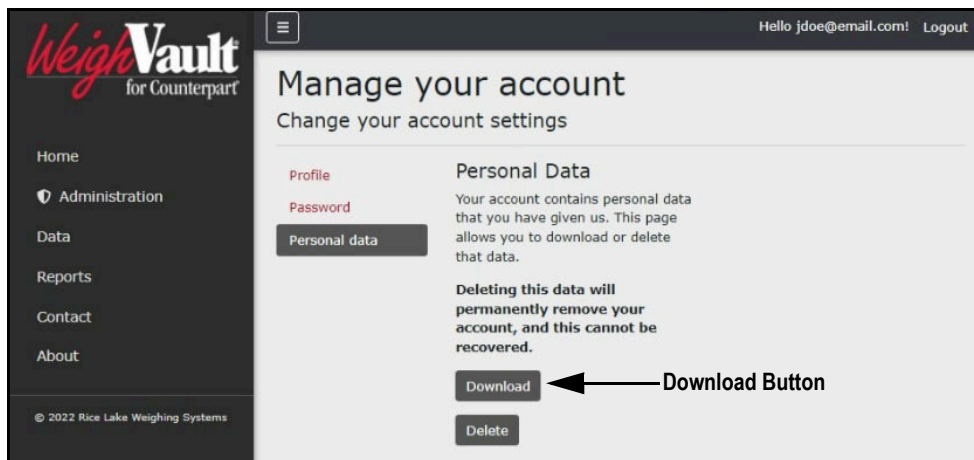


Figure 3-30. Personal Data Page

3.7.3.2 Delete Personal Data and Account

Perform the following to delete personal data and account:

IMPORTANT *Deleting personal data permanently deletes data associated with account and closes the account.*

1. Access Account management page (see [Section 3.7.1 on page 24](#)).
2. Click **Personal Data**.

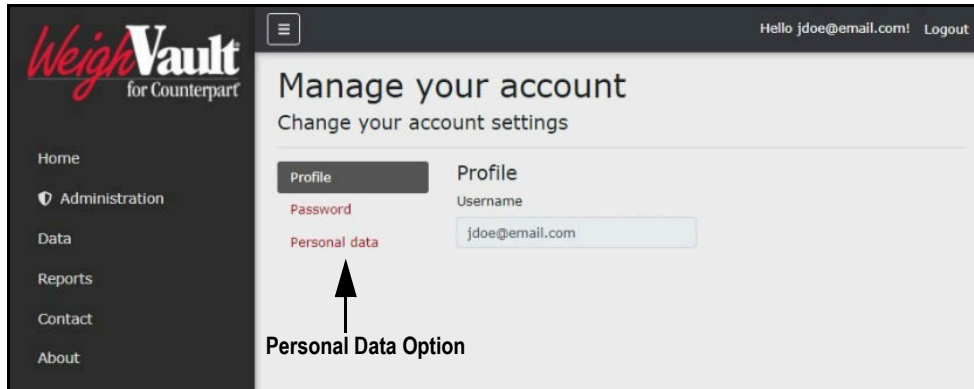


Figure 3-31. Manage Your Account Page

3. The Personal Data page displays.
4. Click **Delete**.

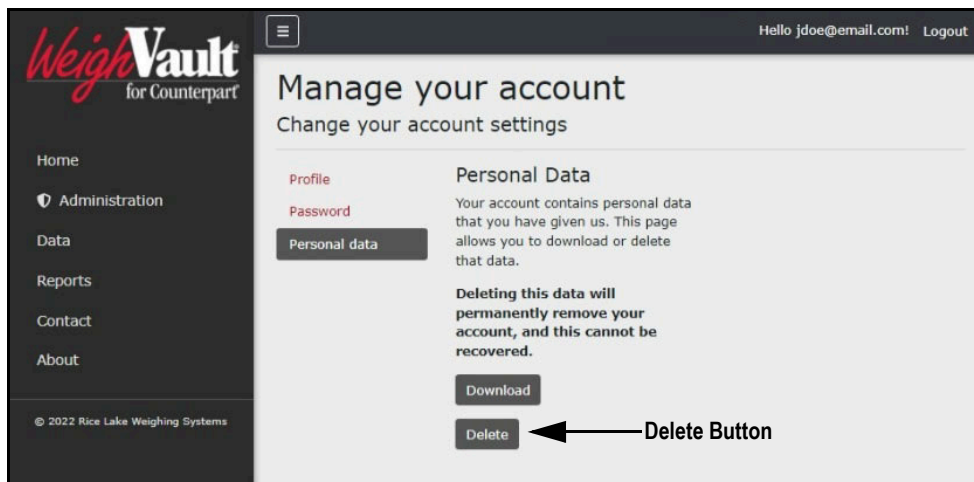


Figure 3-32. Personal Data Page

5. A delete confirmation displays (see [Figure 3-33 on page 28](#)).

6. Enter the account's password then click **Delete data and close my account** to confirm or click the internet browser **Back** button to return to the previous page.

IMPORTANT Account data can not be recovered after deletion.

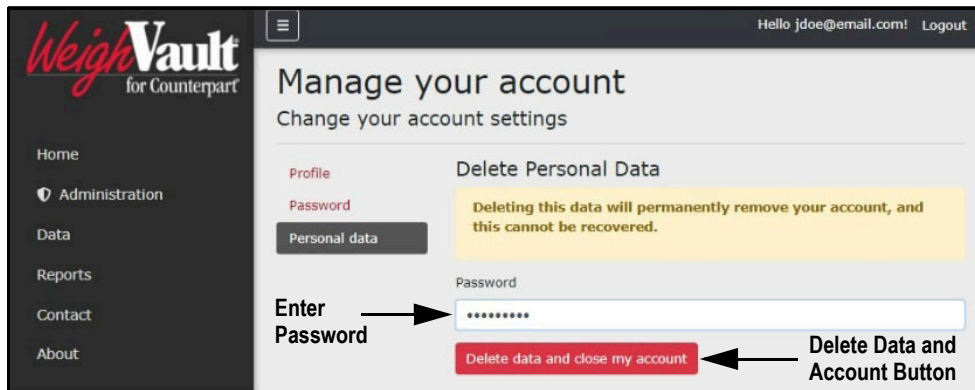


Figure 3-33. Delete Personal Data Page

3.8 Logout of WeighVault

Perform the following to logout from WeighVault:

1. Select **Logout**.

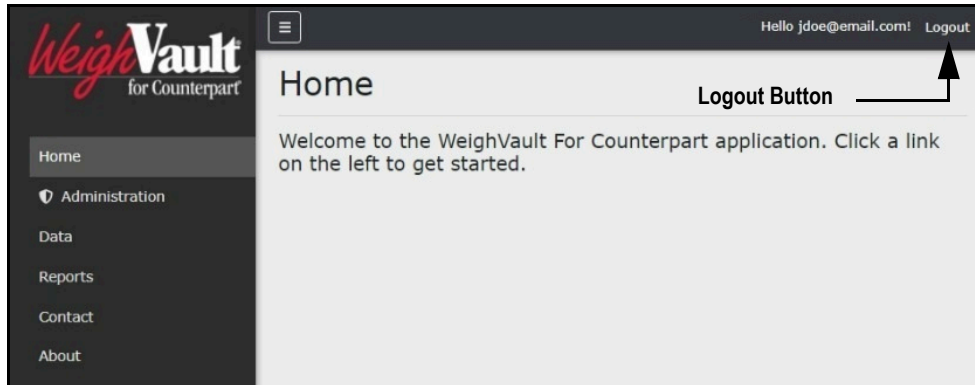


Figure 3-34. Logout Parameter

2. WeighVault logs out and returns to the Home page.

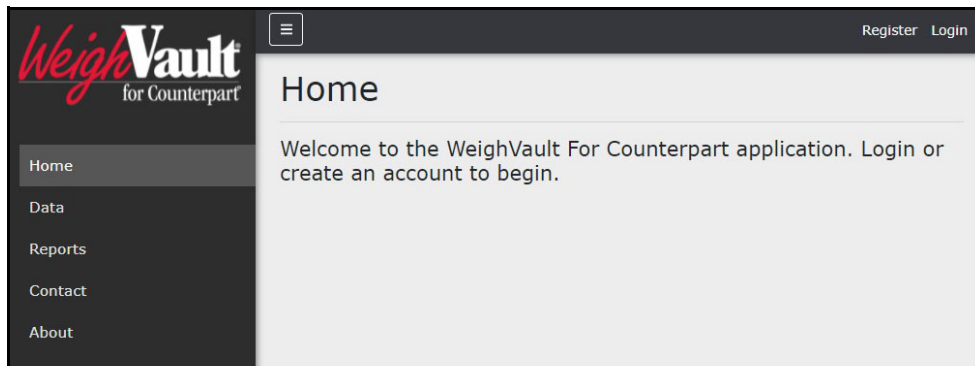


Figure 3-35. Home Page

4.0 Administration

The Administration page provides the basic functionality to manage users, download log files and view server settings. Click the Administration menu option to access the administrator page.



Note The Administration page and its functions is only available to WeighVault administrators.

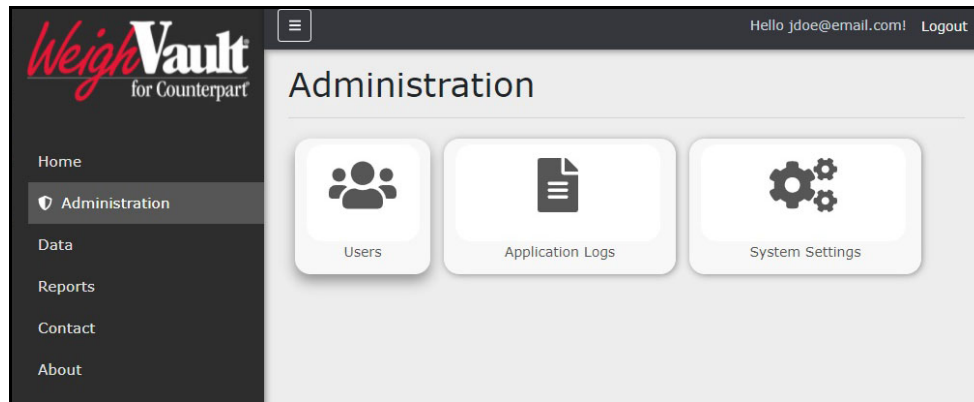


Figure 4-1. Administration Page

This section discusses Administration function in WeighVault, including:

- Access Administration (see [Section 4.1](#))
- Manage Users (see [Section 4.2 on page 30](#))
- View or Download Application Log Files (see [Section 4.3 on page 33](#))

4.1 Accessing Administration

In order to use administration functions, access to the Administration page must first be completed. Perform the following to access the Administration page:

1. Login (see [Section 3.3 on page 14](#)).
2. Select **Administration** from the Main menu.

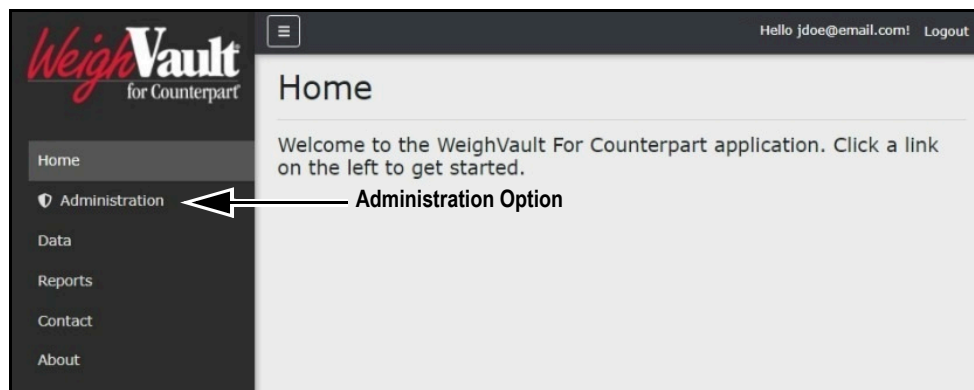


Figure 4-2. Main Menu Administration Option

3. The Administration page displays (see [Figure 4-3 on page 30](#)).

- Click desired function from the page to access it.

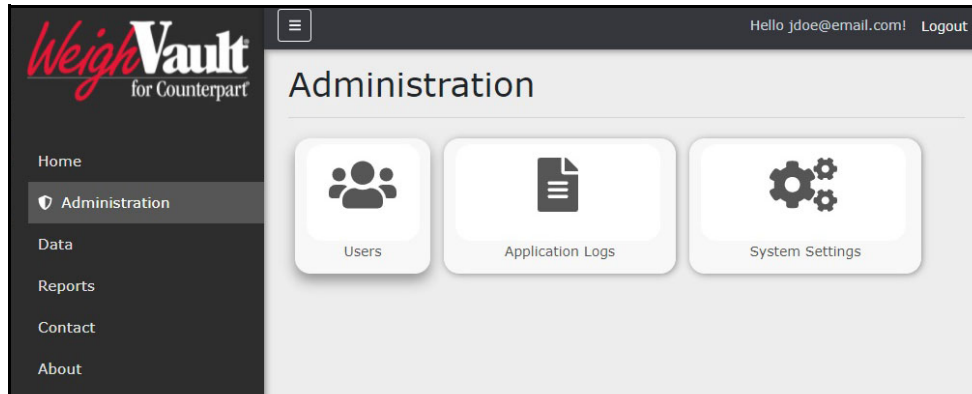


Figure 4-3. Administration Page

4.2 Manage Users

The Administration page provides two functions relating to user management:

- Edit Users (see [Section 4.2.1 on page 30](#))
- Delete Users (see [Section 4.2.2 on page 32](#))

4.2.1 Edit Users

Accounts receive access to pages and their functions based on roles assigned by an administrator. There are three role types: None, User and Administrator. The Edit function allows an administrator to change a role assigned to an account. [Table 4-1](#) lists page access rights granted to each user role.

Page	None	User	Administrator
Home	X	X	X
Administration			X
Data		X	X
Reports		X	X
Contact	X	X	X
About	X	X	X

Table 4-1. Role Access Rights

To edit a user, perform the following:

- Open Administration page (see [Section 4.1 on page 29](#)) then select **Users**.
- Identify the user with a role that requires change then click the associated **Edit** button.

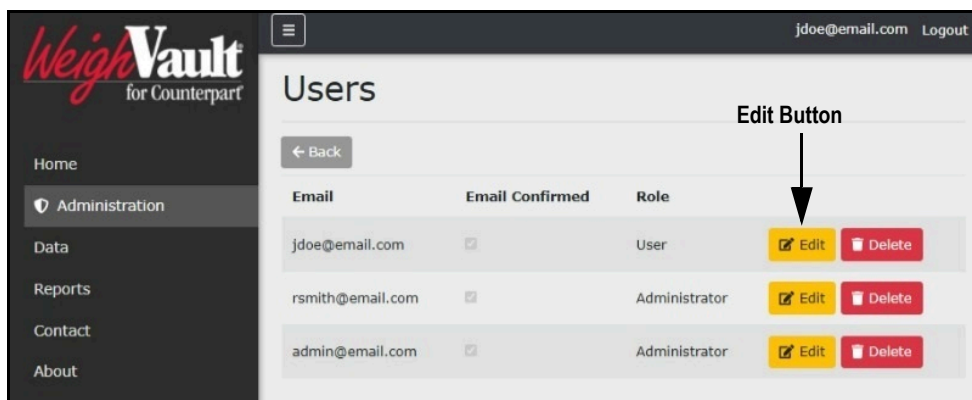


Figure 4-4. Users Page with Edit Function Identified

3. The Edit User page displays.
4. Click the Role drop-down menu and select the required role option.



Note Most users are assigned the User role.

The screenshot shows the 'Edit User' page. The role dropdown menu is expanded, and the 'User' option is highlighted. An arrow points to the 'User' option with the text 'Select Required Role'.

Figure 4-5. Edit User Page with Role Drop-down Menu Expanded

5. Click the **Save** button to commit changes or **Back to List** button to return to previous page.

The screenshot shows the 'Edit User' page. The role dropdown menu is now set to 'Administrator'. An arrow points to the yellow 'Save' button with the text 'Save Button'.

Figure 4-6. Edit Use Page with Role Selected

6. If saved, the user role updates to the new configuration.

The screenshot shows the 'Users' page. A message 'User Role Updated' is displayed above a table of users. The role for the user 'jdoe@email.com' is now 'Administrator'.

Email	Email Confirmed	Role	Edit	Delete
jdoe@email.com	<input checked="" type="checkbox"/>	Administrator		
rsmith@email.com	<input type="checkbox"/>	Administrator		
admin@email.com	<input checked="" type="checkbox"/>	Administrator		

Figure 4-7. User Role Updated

4.2.2 Delete Users

Perform the following to delete a user:

1. Open Administration page (see [Section 4.1 on page 29](#)) then select **Users**.
2. Identify the user that requires removal then click the associated **Delete** button.

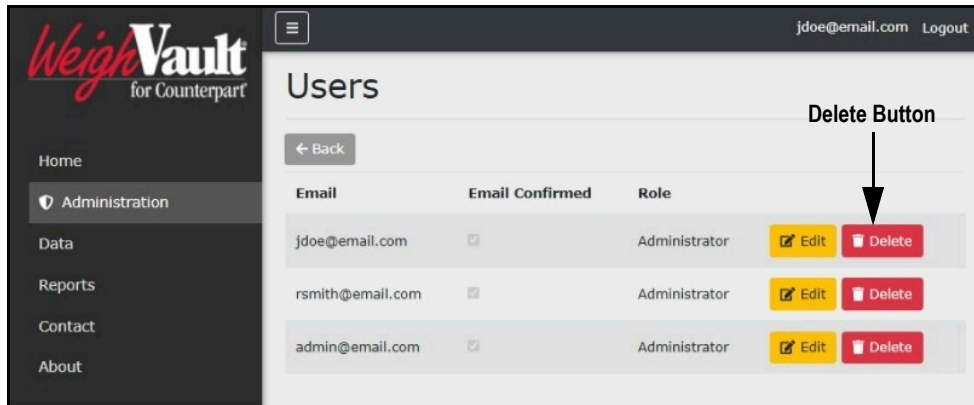


Figure 4-8. Users Page with Delete Identified

3. The system requests confirmation prior to deleting the user.
4. Click the **Delete** button to remove the user.

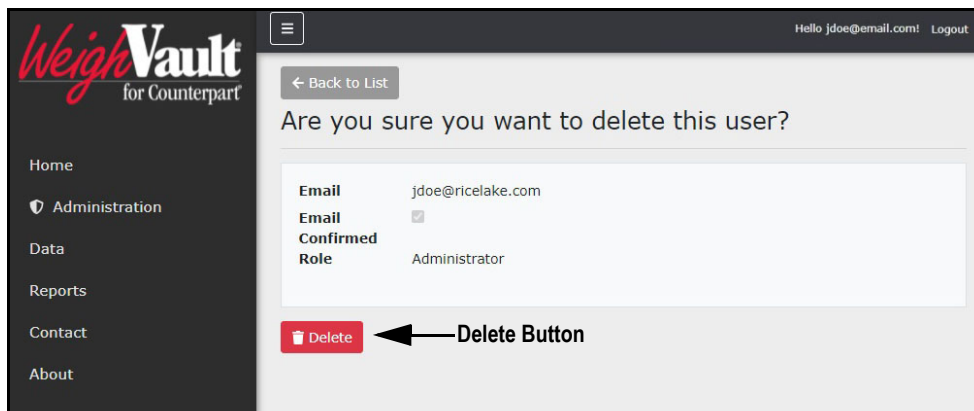


Figure 4-9. Delete User Confirmation

5. The Users page displays with the user removed.

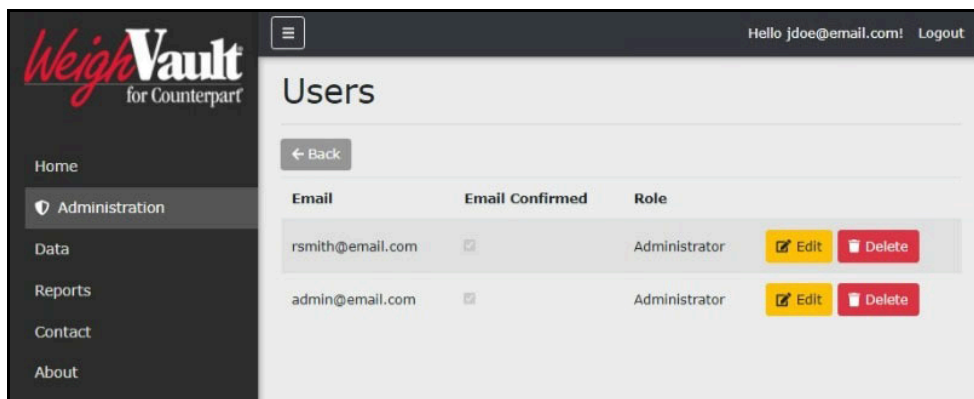


Figure 4-10. User Remove from Users Page

4.3 Application Log Files

Application logs are recordings of system interactions that are typically used by technical support to troubleshoot system issues. The Application Logs page lists available logs with dates as the file names. Perform the following to view or download log files:



Note *The log files are in JavaScript Object Notation (*.json) file format.*

1. Open the Administration page (see [Section 4.1 on page 29](#)) then select **Application Logs**.
2. The Application Logs page displays.
3. Click the log link to display it in the internet browser or the download button to save to local storage.



Note *Depending on the installed internet browser and its configuration, determines the behavior when downloading the application log. The internet browser may automatically download the report, open the Save As window, or request if the file should be downloaded.*

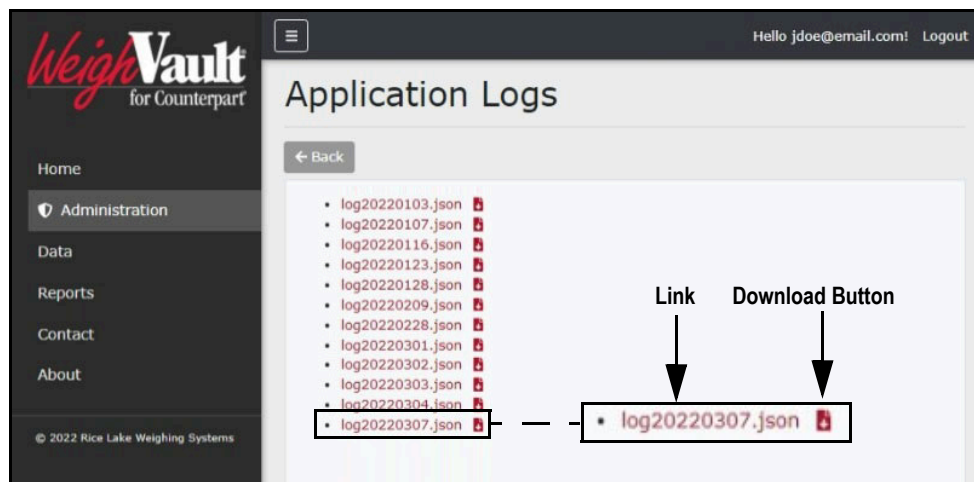


Figure 4-11. Application Logs Page

5.0 Data

The Data menu provides access to the Parts page. The Parts page facilitates viewing, adding, editing, or removing parts from the WeighVault database. The WeighVault database matches a product identification number entered into an indicator with an entry in the database in the database and loads this information into the Counterpart and then sends transaction data back to the database.

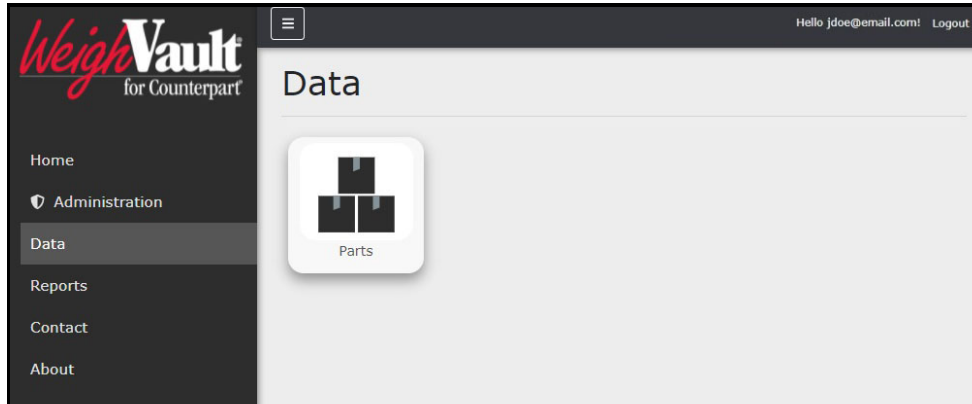


Figure 5-1. Data Page Parts Option

This section discusses the following topics:

- Access Data and Parts Page (see [Section 5.1](#))
- Add a Part (see [Figure 5.2 on page 35](#))
- Edit a Part (see [Section 5.3 on page 37](#))
- View Part Details (see [Section 5.4 on page 38](#))
- Delete a Part (see [Section 5.5 on page 39](#))
- Importing Parts via Text File (see [Section 5.6 on page 40](#))

5.1 Access Data and Parts Pages

In order to use data functions, access to the Parts page must first be completed. Perform the following to access the Parts page:

1. Login (see [Section 3.3 on page 14](#)).
2. Click **Data** from the Main menu.

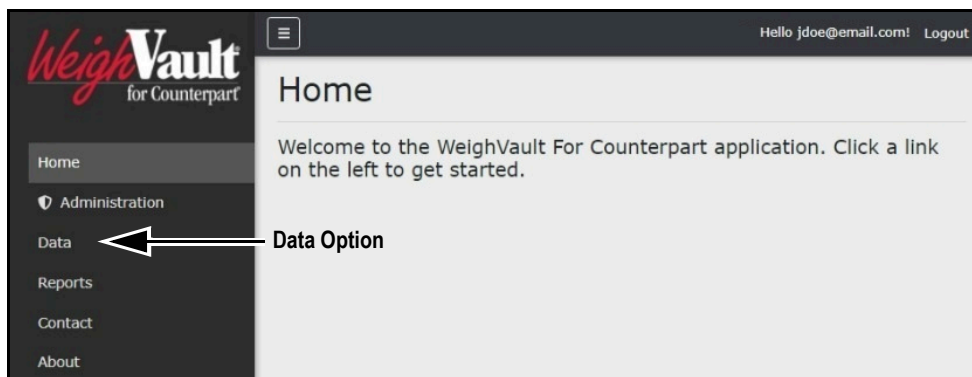


Figure 5-2. Main Menu Data Option

- The Data page displays.
- Select **Parts**.

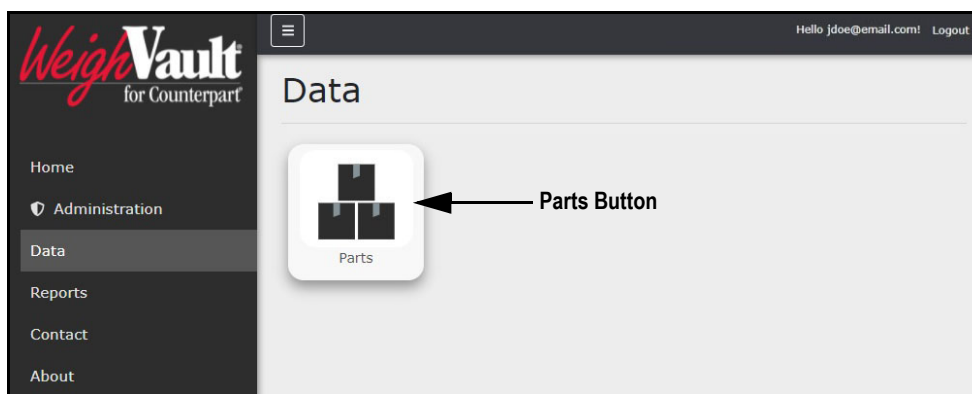


Figure 5-3. Data Page Parts Option

- The Parts page displays.

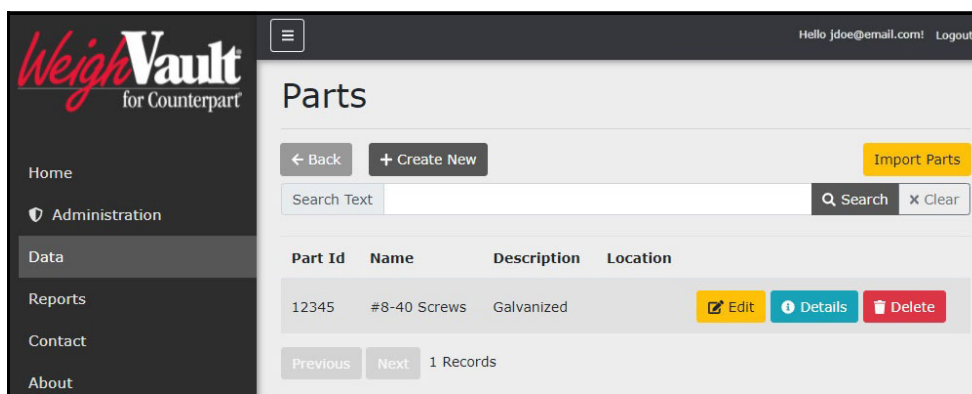


Figure 5-4. Parts Page

5.2 Add a Part

WeighVault provides the functionality to add parts to the database. Clicking the Create New button opens a new page with the necessary parameters to create a new part.



Note Parts can be imported in bulk using the import function (see [Section 5.6 on page 40](#)).

Perform the following to add a part:

- Open Parts page (see [Section 5.1 on page 34](#)).
- Click **Create New**.

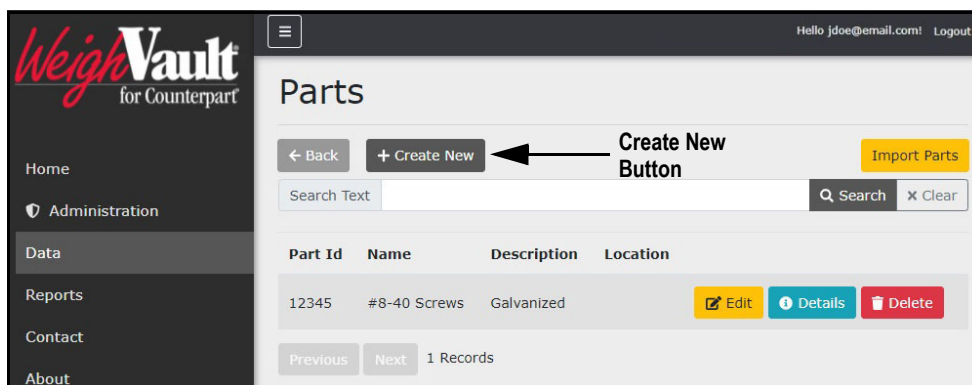


Figure 5-5. Parts Page with Create New Button Identified

3. The Create Part page displays.
4. Enter required data into parameter fields.

 **Note** See [Table 5-1 on page 38](#) for parameter descriptions.

5. Click **Create**.

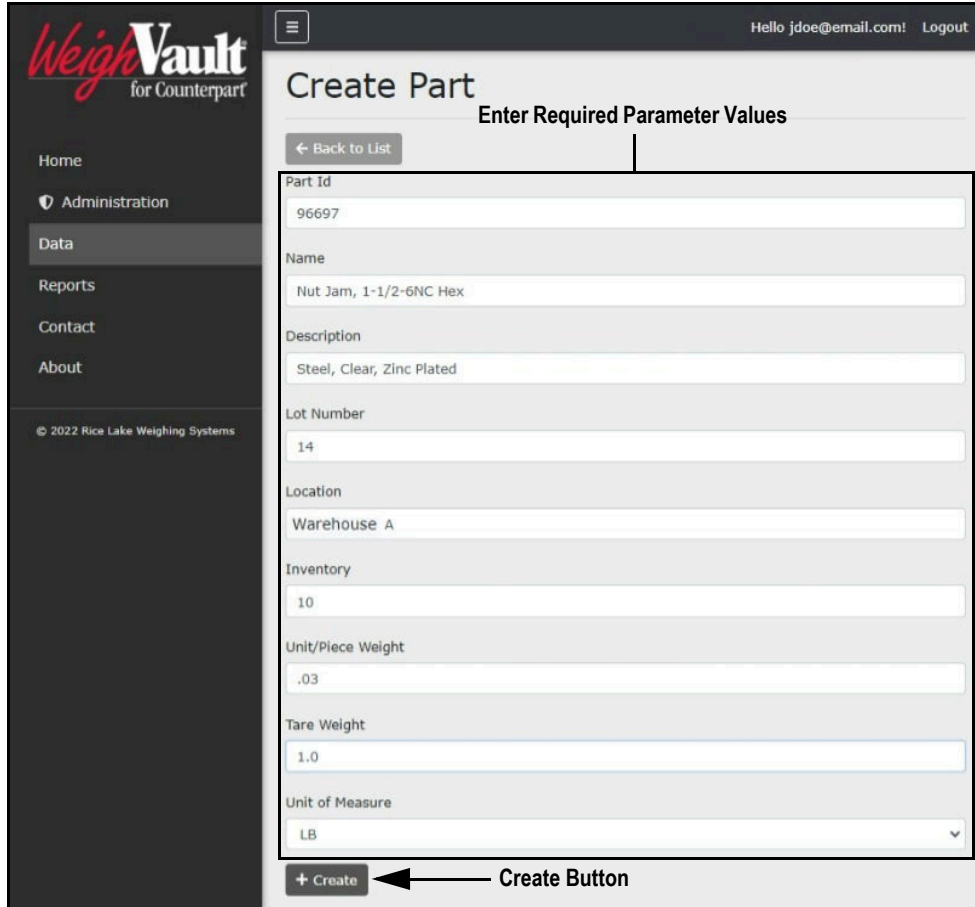
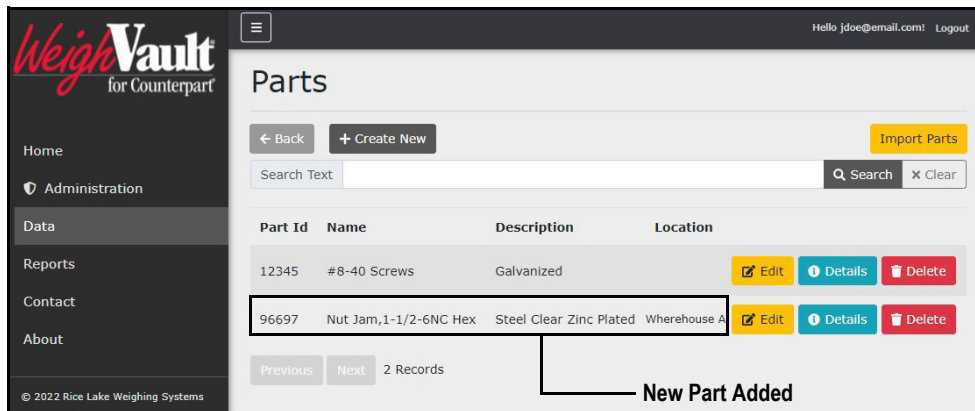


Figure 5-6. Create Part Page

6. The new part displays in the Parts page.



Part Id	Name	Description	Location	
12345	#8-40 Screws	Galvanized		Edit Details Delete
96697	Nut Jam, 1-1/2-6NC Hex	Steel Clear Zinc Plated	Wherehouse A	Edit Details Delete

Figure 5-7. Parts Page with new Entry

5.3 Edit a Part

WeighVault provides the functionality to edit parameter definitions. Clicking the Edit button adjacent to a part opens a new page with editable part parameter fields. Perform the following to edit part parameters:

1. Open Parts page (see [Section 5.1 on page 34](#)).
2. Locate the part that requires change then click **Edit**.

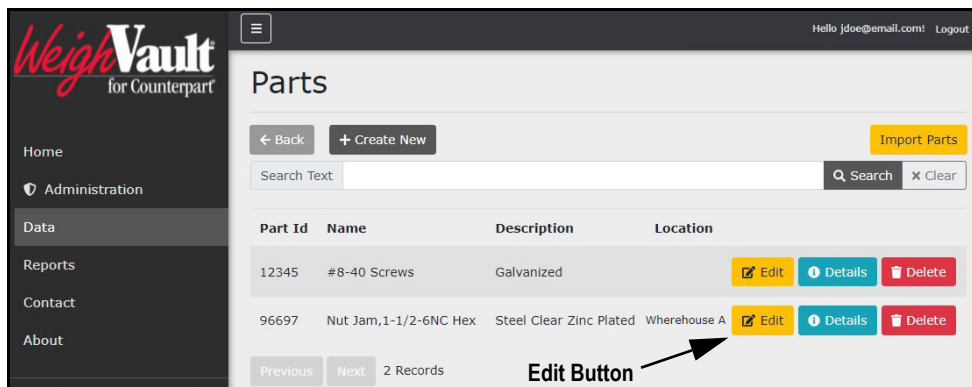


Figure 5-8. Parts Page with Edit Button Identified

3. The Edit Part page displays.
4. Edit fields as required.



Note See [Table 5-1 on page 38](#) for parameter descriptions.

5. Click **Save** to confirm or **Back to List** to cancel.

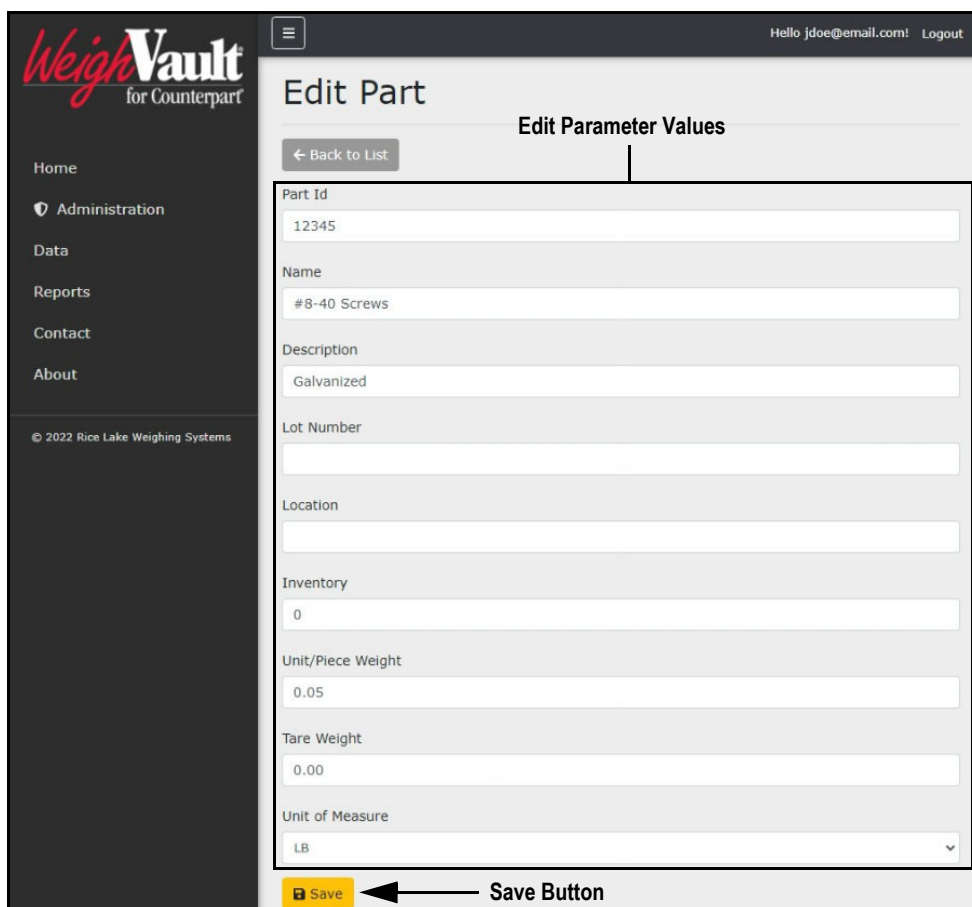


Figure 5-9. Edit Part Page

5.3.1 Parts Parameters

The following parameters are used when adding or editing parts.

Parameter	Required	Description
Part Id	X	An alphanumeric entry with up to 32 characters that is the identifier associated with the part
Name		An alphanumeric entry up to 32 characters that titles the part
Description		An alphanumeric entry up to 32 characters that describes the part
Lot Number		An alphanumeric entry up to 32 characters that lists the lot number of the part
Location		An alphanumeric entry up to 12 characters that lists the storage location of the part
Inventory		A numeric entry with up to 8 characters that lists the current stock of the part
Unit/Piece Weight		A numeric entry with up to 8 characters that lists the part's weight
Tare Weight		A numeric entry with up 8 characters that lists the weight of an empty part's container
Unit of Measure	X	A selected option that determines the type of measurement used to weight the part (LB, KG, G or OZ)

Table 5-1. Add and Edit Part Parameter Descriptions

5.4 View Part Details

Even though a part contains several details that are established when a part is configured, the Parts page only lists four details: Part Id, Name, Description and Location. View full part information by selecting the Details button in the Parts page.

1. Open Parts page (see [Section 5.1 on page 34](#)).
2. Locate the part with details to be viewed then click **Details**.

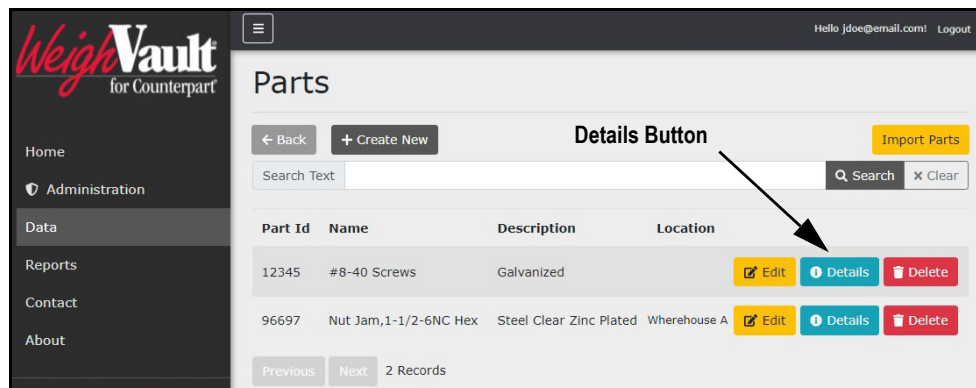


Figure 5-10. Parts Page with Details Button Identified

3. The Part Detail page displays. Review part information.
4. Click **Edit** to open the Edit page for the selected part or **Back to List** to return to previous page.



Note For information regarding how to edit a part, see [Section 5.3 on page 37](#).

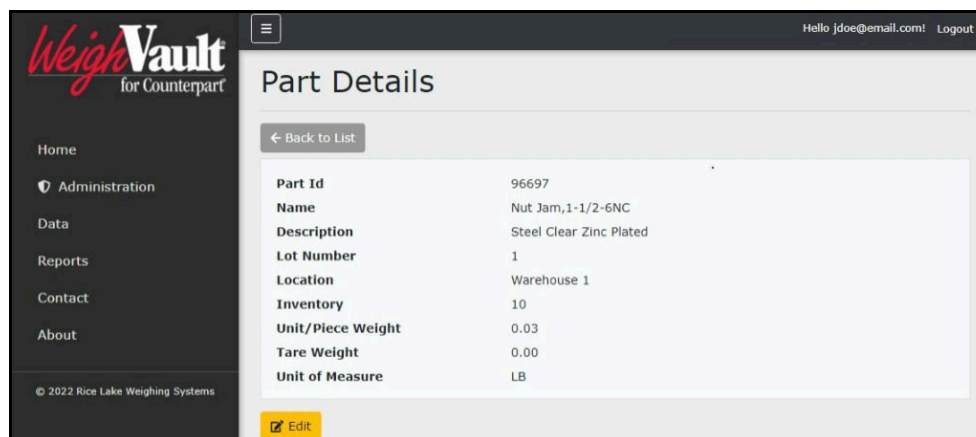


Figure 5-11. Part Details Page

5.5 Delete a Part

WeighVault provides the functionality to delete products from the database. Perform the following to delete a part:

1. Open Parts page (see [Section 5.1 on page 34](#)).
2. Identify the required part to remove then click **Delete**.

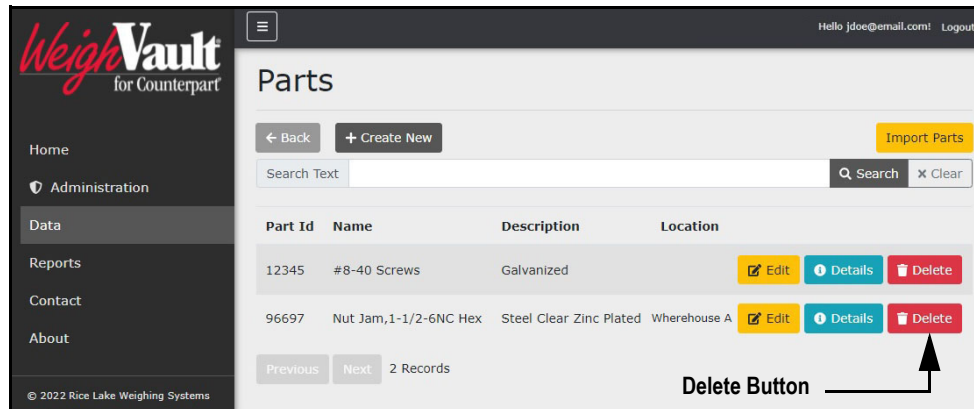


Figure 5-12. Parts Page with Delete Identified

3. The Delete Part page displays.
4. Select **Delete** to confirm or **Back to List** to cancel.

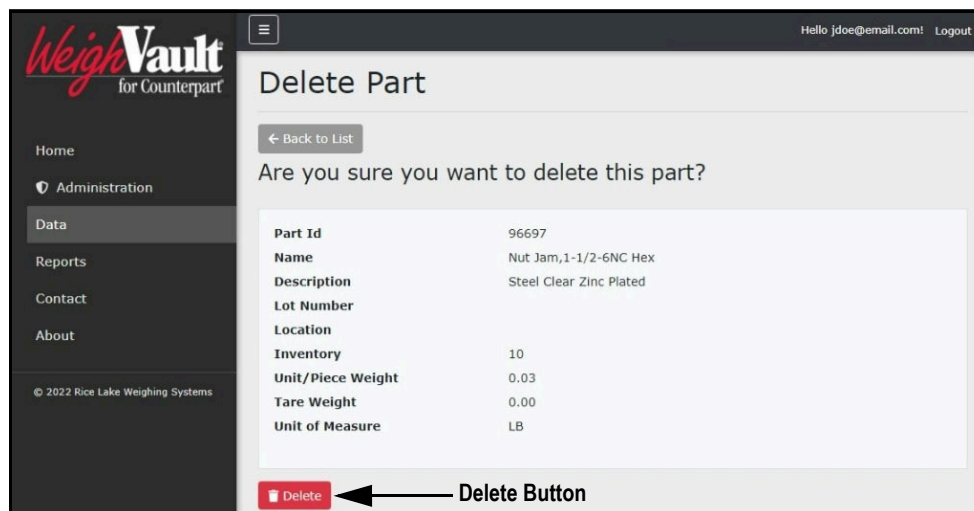


Figure 5-13. Delete Part Page with Delete Button Identified

5. If **Delete** is selected, the Parts page opens with the part removed.

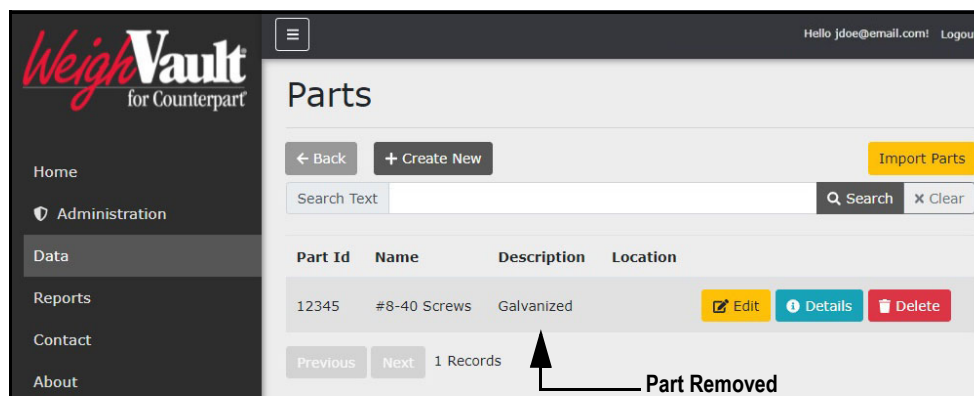


Figure 5-14. Parts Page with Entry Removed

5.6 Importing Parts

WeighVault can bulk import parts from a user configured template file. Importing parts is typically achieved in the following order:

- Downloading the template (part_import.txt) from WeighVault (Section 5.6.1)
- Configuring the template while adhering to provided rules (Section 5.6.2 on page 41)
- Importing the template into WeighVault to populate additional parts in the parts database (Section 5.6.3 on page 43)

5.6.1 Download Parts List Template

Perform the following to download the bulk part import template:

1. Open Parts page (see Section 5.1 on page 34).
2. Click **Import Parts**.

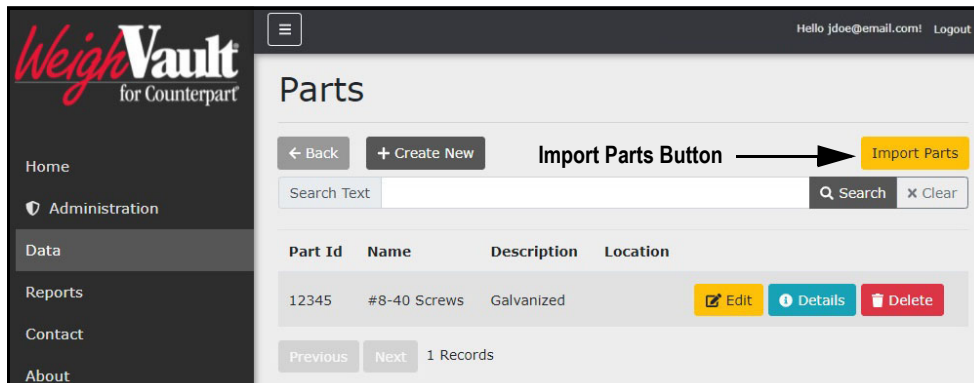


Figure 5-15. Parts Page with Import Parts Button Identified

3. The Import Parts window displays.
4. Right-click **Download template file** then select **Save link as** from the context menu.

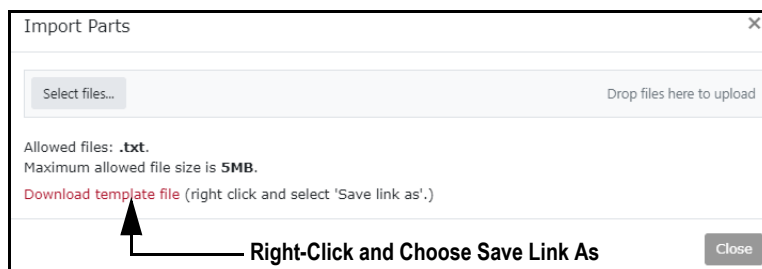


Figure 5-16. Import Parts Window with Context Menu Opened

5. The Save As window appears with the default file name entered (**part_import.txt**).
6. Navigate to the desired location then click **Save**.

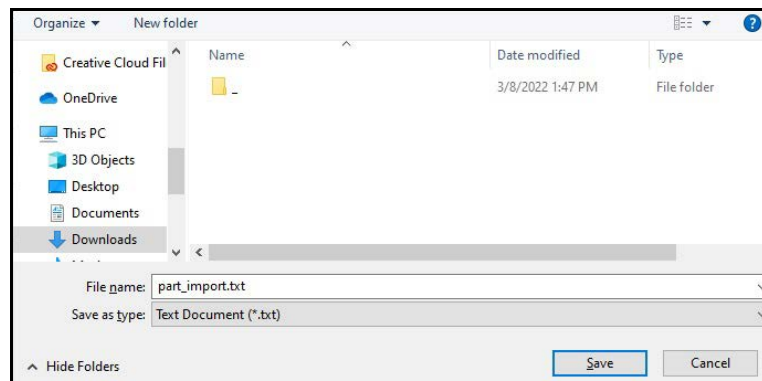


Figure 5-17. Save As Window with Default Template File Name

5.6.2 Format Parts List Template

After the template is downloaded, it may be formatted to contain one or many parts. The template is a text (*.txt) file and can be opened and edited in a standard text editor (such as Notepad). The template must be configured in accordance to a set of rules and format that are documented in the file.

5.6.2.1 Rules

This section describes rules that must be followed when configuring the template file. [Figure 5-18](#) displays an example of the template and its rules.

```

part_import.txt - Notepad
File Edit Format View Help
# Lines starting with a # character are considered a comment and will be ignored
# Empty lines are ignored
#
# Separate fields with a single TAB (ASCII 9) character. This is noted below with the <TAB> placeholder/label.
#
# Rules:
# PartId field is required.
# PartId field max length is 32 characters.
# PartId field must be unique. If the part id exists, the line will not be imported.
#
# Name is an optional field.
# Name max length is 32 characters.
#
# Description is an optional field.
# Description max length is 32 characters.
#
# LotNumber is an optional field.
# LotNumber max length is 32 characters.
#
# Location is an optional field.
# Location max length is 12 characters.
#
# Unit Weight field is numeric.
# Unit Weight field can only consist of 0-9, dot, and comma characters.
# Unit Weight field must use a dot as the decimal separator character.
# Unit Weight field can optionally use a comma as the thousands separator character.
# Unit Weight field must have between 1 and 8 characters.
#
# Tare field is numeric.
# Tare field can only consist of 0-9, dot, and comma characters.
# Tare field must use a dot as the decimal separator character.
# Tare field can optionally use a comma as the thousands separator character.
# Tare field must have between 1 and 8 characters.
#
# UnitOfMeasure field is required.
# UnitOfMeasure field max length is 5 characters.
#
# Inventory field is numeric.
# Inventory field can only consist of 0-9 characters.
# Inventory field must have between 1 and 8 characters.
#
# File Layout
# PartId<TAB>Name<TAB>Description<TAB>LotNumber<TAB>Location<TAB>UnitWeight<TAB>Tare<TAB>UnitOfMeasure<TAB>Inventory
Ln 1, Col 1 100% Windows (CRLF) UTF-8 with BOM

```

Figure 5-18. Parts Template Embedded Rules

The following are general template configuration rules:

- Lines starting with a # character are considered a comment and are ignored
- Empty lines are ignored
- Separate parameter fields with a single Tab (ASCII 9)

Each part entry must adhere to the following format:

PartId<TAB>Name<TAB>Description<TAB>LotNumber<TAB>Location<TAB>UnitWeight<TAB>Tare<TAB>UnitOfMeasure<TAB>Inventory								
A	B	C	D	E	F	G	H	I

Figure 5-19. Dichotomy of Part Entries

Table 5-2 describes elements identified in Figure 5-19.

Item	Parameter	Required	Rules
A	PartId	X	Sets the part identification number, word or entry for the part. Configure PartId as an alphanumeric entry with up to 32 characters. NOTE: The PartID value must be unique, if the part id exists, the entry will not be imported.
B	Name		Set a name for the part. Configure Name as an alphanumeric entry with up to 32 characters.
C	Description		Sets a description for the part. Configure Description as an alphanumeric entry with up to 32 characters.
D	LotNumber		Sets a lot number associated with the part. Configure LotNumber as an alphanumeric entry with up to 32 characters.
E	Location		Sets the location of the part. Configure Location as an alphanumeric entry with up to 12 characters. For example Warehouse 1, shelf 27 B,
F	Unit Weight		Sets the weight of the part. Configure Unit Weight as a numeric entry with up to 8 characters. The value can only consist of 0-9, . (period) , and , (comma) characters. A period must be used as the decimal separator character. The value can optionally use a comma as the thousands separator character. In most cases set to configure weight similar to: 1001.00
G	Tare		Sets the empty part container weight. Configure Tare as a numeric entry with up to 8 characters. The value can only consist of 0-9, . (period) , and , (comma) characters. A period must be used as the decimal separator character. The value can optionally use a comma as the thousands separator character. In most cases set to configure weight similar to: 1001.00
H	UnitofMeasure	X	Sets the unit of measure applied to the weight configuration. Configure Units as one of the following: LB, KG, G or OZ Note: This Unit of Measure must be configured on the Counterpart before it can be used.
I	Inventory		Sets the quantity of part currently in inventory. Configure Inventory as a numeric entry with up to 8 characters. The value can only consist of 0-9 characters.

Table 5-2. Import File Parameter Rules



Note

The weight values must not be more precise than the devices they will be used with.

5.6.2.2 Completed Examples

This section provides two examples of completed part entries in different scenarios.

- Figure 5-20 displays a standard entry example
- Figure 5-21 displays an example with parameter values omitted

Figure 5-20 provides an example of a completed entry with all data values. The format follows the rules outlined in the previous section. For reference the part format is listed above the example.

PartId	Name	Description	LotNumber	Location	UnitWeight	Tare	UnitOfMeasure	Inventory
A	B	C	D	E	F	G	H	I
96697	Nut Jam,1-1/2-6NC	Steel Clear Zinc Plated	1	Warehouse 1	0.03	0.00	LB	10
A	B	C	D	E	F	G	H	I

Figure 5-20. Dichotomy of Part Entries with Completed Example

Figure 5-21 displays an entry when two data values are omitted. See Table 5-2 for a list of parameter that may be omitted in part entries. When configuring an entry without data values, the placement of all data values must be maintained; however, parameters that are omitted are left blank. Figure 5-21 provides an example of an entry where the Description and Tare values are omitted. For reference the part format is displayed above the example.

PartId	Name	Description	LotNumber	Location	UnitWeight	Tare	UnitOfMeasure	Inventory
A	B	C	D	E	F	G	H	I
96697	Nut Jam,1-1/2-6NC		1	Warehouse 1	0.03		LB	10
A	B	C	D	E	F	G	H	I

Figure 5-21. Dichotomy of Part Entries with Completed Example with Skipped Fields

5.6.3 Format Parts List

To configure and import a parts list, perform the following:

1. Locate and open the parts list template in the preferred text editor (Notepad is recommended).
2. Create a new empty line.
3. Enter the PartId value then press tab. In this example 96697 is entered.
4. Repeat until all values are entered.



Note For parameter value definitions see [Table 5-2 on page 42](#).

```

*part_import.txt - Notepad
File Edit Format View Help
# Inventory field is numeric.
# Inventory field can only consist of 0-9 characters.
# Inventory field must have between 1 and 8 characters.

# File Layout
# PartId<TAB>Name<TAB>Description<TAB>LotNumber<TAB>Location<TAB>UnitWeight<TAB>Tare<TAB>UnitOfMeasure<TAB>Inventory
96697 Nut Jam,1-1/2-6NC Steel Clear Zinc Plated 1 Warehouse 1 0.03 0.00 LB 10

```

New Part Entry Added

Figure 5-22. part_import.txt Template with Entry Added

5. Repeat steps 2 through 4 to add more part entries.

```

part_import.txt - Notepad
File Edit Format View Help
# Inventory field is numeric.
# Inventory field can only consist of 0-9 characters.
# Inventory field must have between 1 and 8 characters.

# File Layout
# PartId<TAB>Name<TAB>Description<TAB>LotNumber<TAB>Location<TAB>UnitWeight<TAB>Tare<TAB>UnitOfMeasure<TAB>Inventory
96697 Nut Jam,1-1/2-6NC Steel Clear Zinc Plated 1 Warehouse 1 0.03 0.00 LB 10
97257 Nut Jam,1-6NC Steel Clear Zinc Plated 1 Warehouse 1 0.03 0.00 LB 10
92487 Nut Jam,2-6NC Steel Clear Zinc Plated 1 Warehouse 1 0.03 0.00 LB 10
92497 Nut Jam,1/2-6NC Steel Clear Zinc Plated 1 Warehouse 1 0.03 0.00 LB 10

```

New Part Entries Added

Figure 5-23. part_import.txt Template with Entry Added

6. After required entries are added, save the template file.

5.6.4 Import Parts List

After a parts list is configured, it may be uploaded and processed in WeighVault. Perform the following to upload a parts list template.

1. Open Parts page (see [Section 5.1 on page 34](#)).
2. Click **Import Parts**.

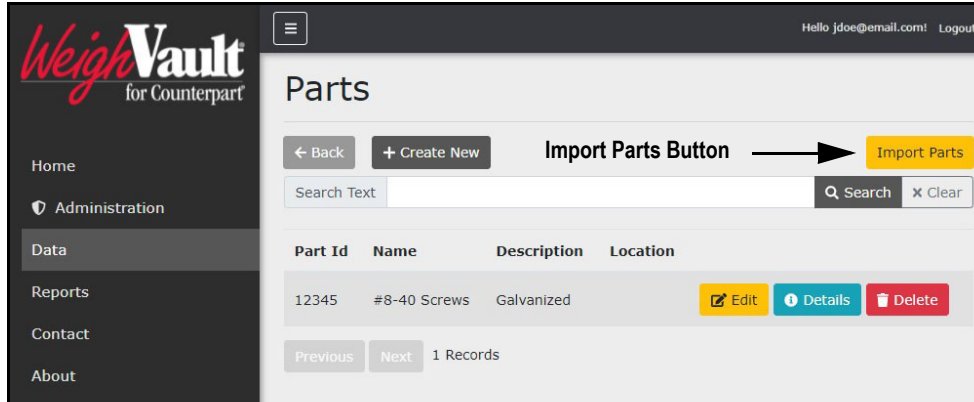


Figure 5-24. Parts Page with Import Parts Button Identified

3. Click **Select files...**

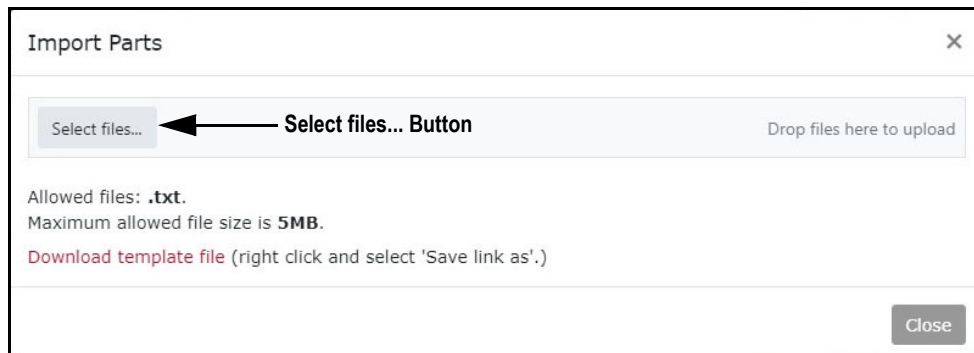


Figure 5-25. Import Parts Window with Select Files Button Identified

4. The Open window displays.
5. Navigate to and open the configured template text file.



Note The default template file name is `part_import.txt`.

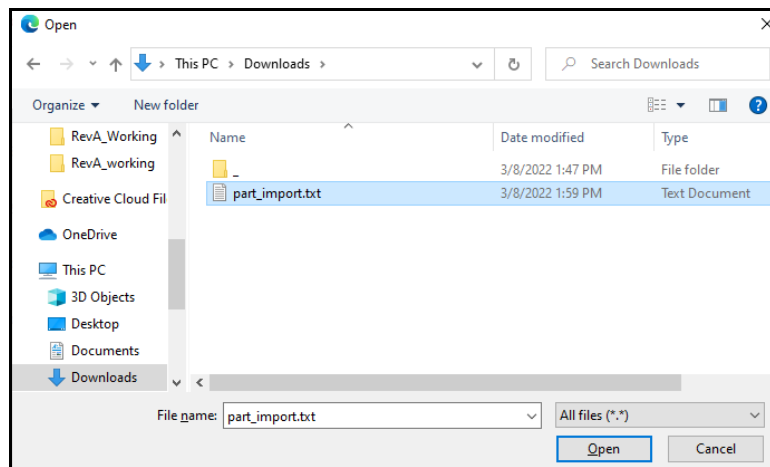


Figure 5-26. Open Window with Template File Selected

6. The Open window closes and the Import Parts window reflects the file selection.
7. Click **Upload** to confirm.



Note The template file size must be under 5 MB.

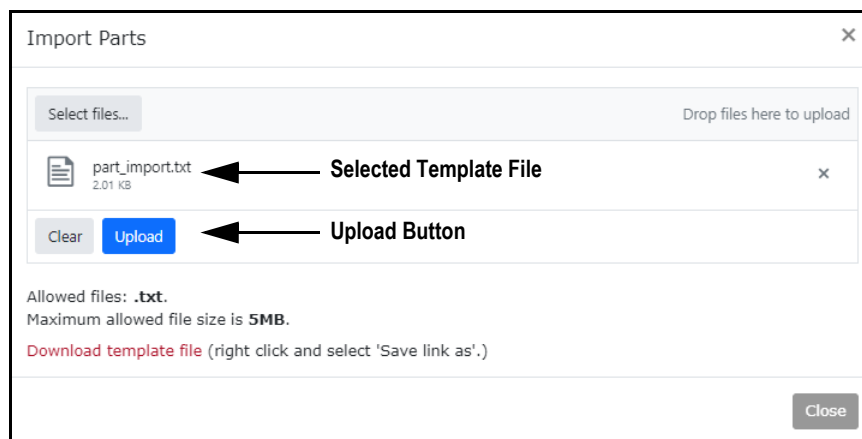


Figure 5-27. Import Parts Window with Template Selected

8. If the template upload was successful, the Import Parts window displays “File(s) uploaded successfully.” and lists the quantity of parts added to the database.
9. Click **Close**.

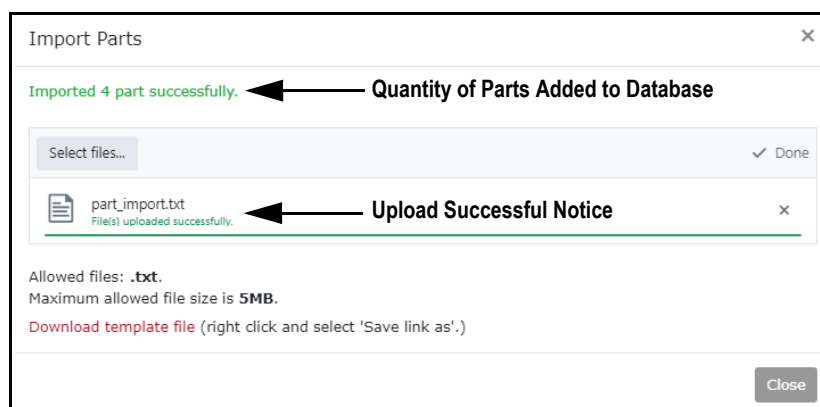


Figure 5-28. Import Parts Window with New Parts Added



Note If the template upload was successful but parts were not added to the database, the Import Parts window displays “Imported 0 parts successfully.” This error typically occurs when the parts were not formatted correctly. Verify part formatting in template (see [Section 5.6.2.2 on page 42](#)) and restart procedure.



Figure 5-29. Import Parts Window without New Parts Added

10. The Parts page appears, click internet browser's Refresh button to see parts added to database.

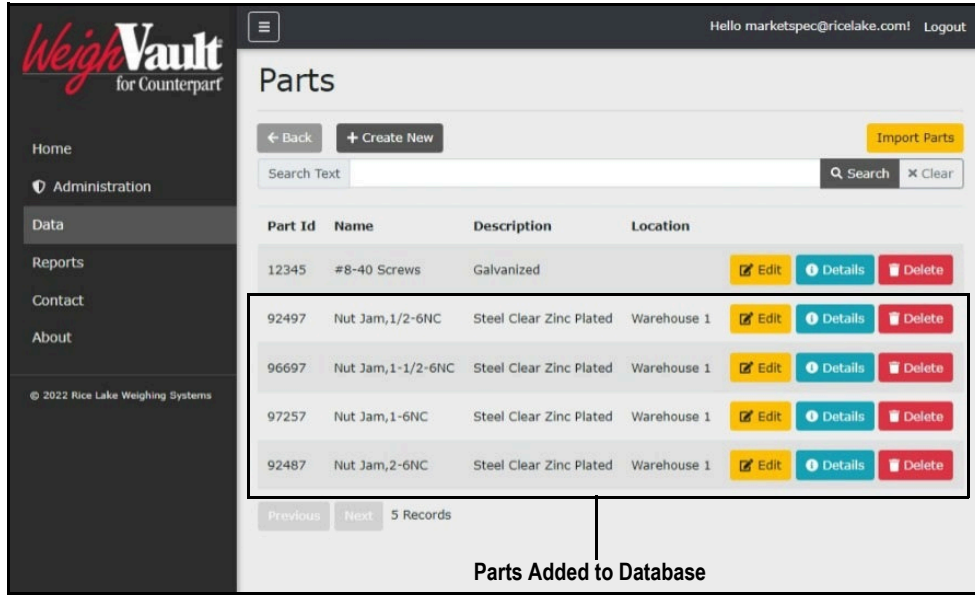


Figure 5-30. Parts Page with New Parts Added to Database

6.0 Reports

WeighVault includes a reporting function that can generate four different reports involving part information. Click the Reports menu option to view reporting categories.

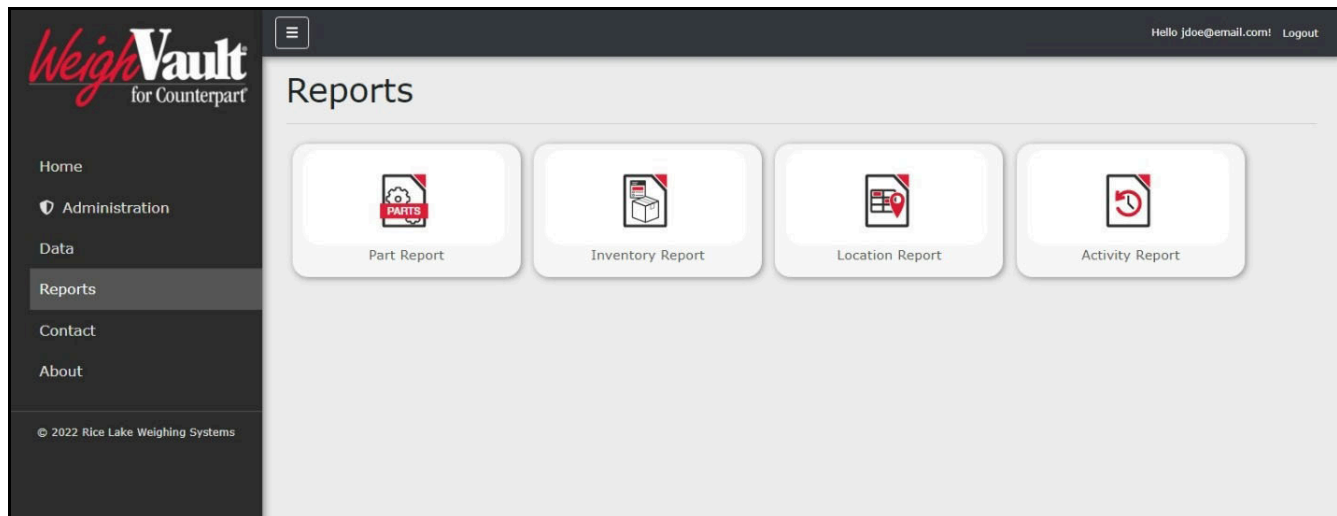


Figure 6-1. Reports Page

This section discusses the following topics:

- Access Reports (see [Section 6.1](#))
- Generate Reports (see [Section 6.2 on page 49](#))
- Print Reports (see [Section 6.3 on page 51](#))
- Export Reports (see [Section 6.4 on page 51](#))

6.1 Access Reports Pages and Report

In order to generate a report, it must first be accessed. Perform the following to access the Reports page and Reports.

1. Login (see [Section 3.3 on page 14](#)).
2. Click **Reports** in the Main menu.

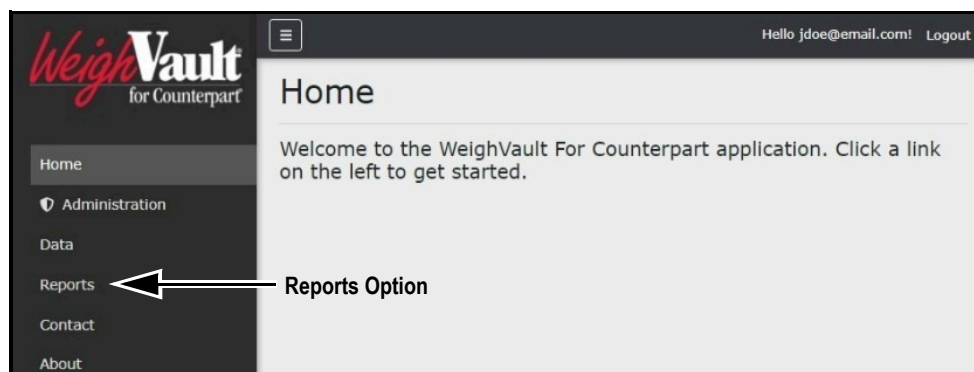


Figure 6-2. Main Menu Reports Option

3. The Reports page displays (see [Figure 6-3 on page 48](#)).

- Click the desired report type.

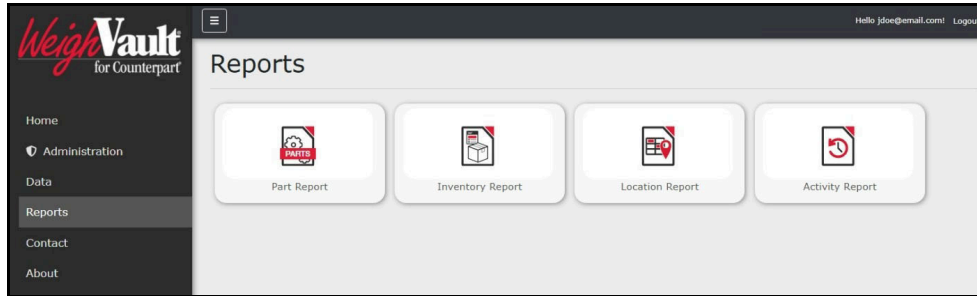


Figure 6-3. Reports Page

- The Report page displays (in this example Parts Report is selected).

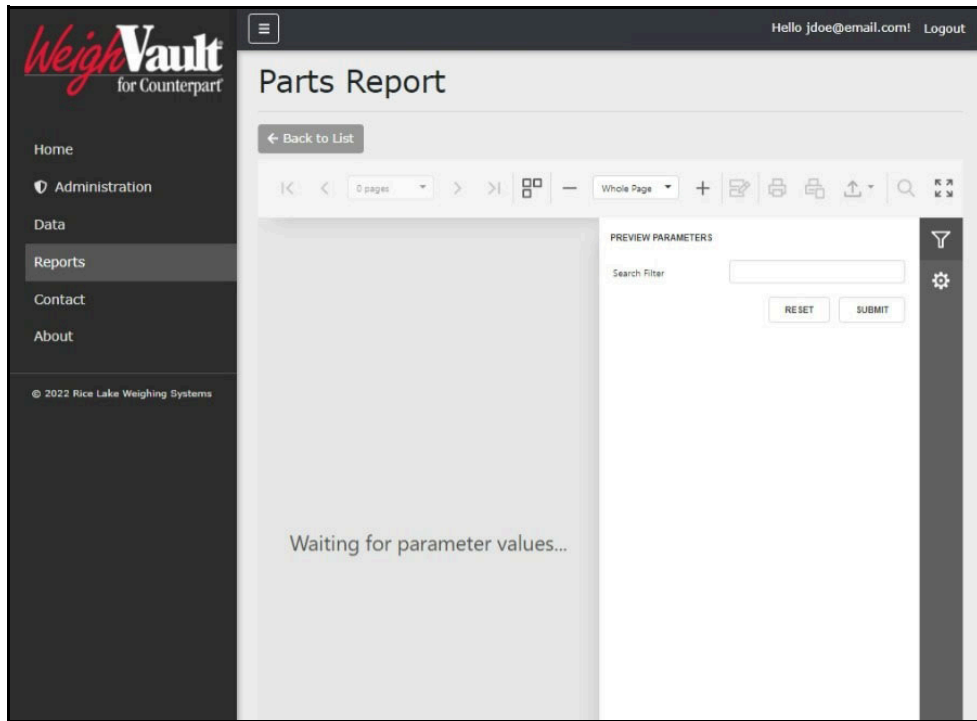


Figure 6-4. Parts Report Page

6.2 Generate Report

Reports contain parameters that may be configured to tailor results to user defined search criteria. This section discusses parameters available in reports and how to generate reports.

6.2.1 Report Search Parameters

Each report provides configurable parameters that query the database to yield specific results. [Figure 6-5](#) displays search parameters available in each report. Inventory reports and activity reports require parameters to create a report. Part and Location reports can generate without configuring search parameters.

Part Report Parameter

Inventory Report Parameters

Location Report Parameters

Activity Report Parameters

Figure 6-5. Report Search Parameters

Table 6-1 describes the search parameters in each report.

Parameter	Report	Description
Filter	Part, Inventory Location, Activity	Searches database for parts that contain a user defined specific keyword, number or alpha-numeric combination
Minimum Inventory	Inventory	Searches database for parts that meet a minimum inventory criteria.
Location	Location	Searches database for parts that meet a location criteria.
Start Date	Activity	Searches database for parts that have activity at the defined start date
End Date	Activity	Searches database for parts that have activity at the defined end date

Table 6-1. Report Search Parameter Descriptions

6.2.2 Generate Report

Perform the following to generate a report:

1. Open Reports page (see [Section 6.1 on page 47](#)).
2. If required, configure search parameter(s) (see [Section 6.2.1 on page 49](#)).
3. Click **Submit**.

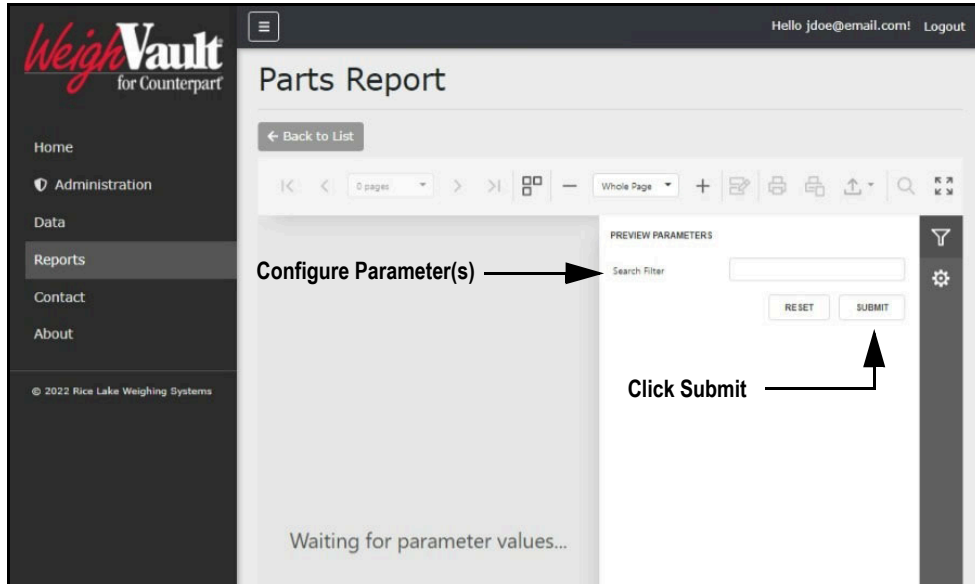


Figure 6-6. Report Parameter Configuration

4. The report generates.

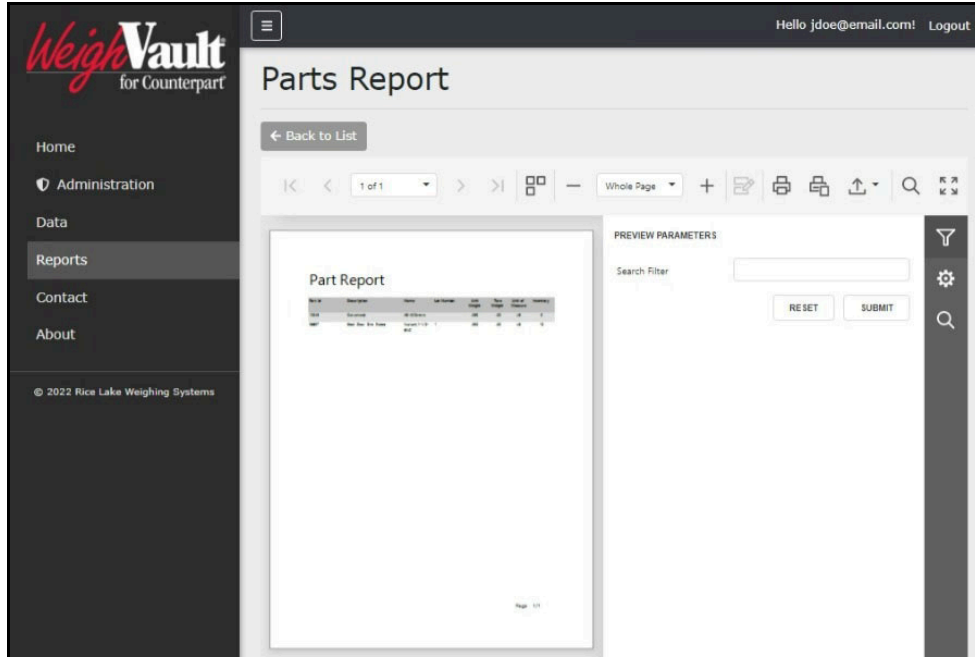


Figure 6-7. Generated Report

6.3 Print Report

Perform the following to print a report:

1. Generate a report (see [Section 6.2.2 on page 50](#)).
2. Perform one of the following print options:
 - A. To print the entire report, click **Print**.
 - B. To print the active page, click **Print Active Page**.

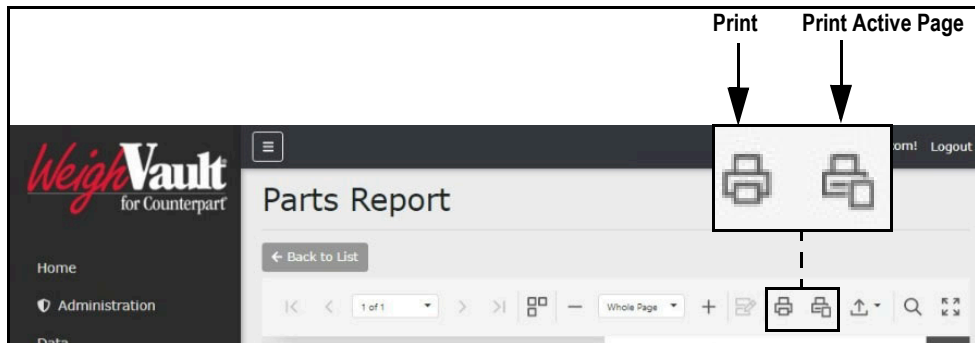


Figure 6-8. Report Print Options

3. After a print button is activated, the internet browser's print window displays.
4. Complete print window prompts to print the report. Typically a printer must be configured then a **Print** button selected.

 **Note** *The Print window varies depending on internet browser.*

6.4 Export Report

Reports may be exported in the following formats: *.pdf, *.xls (Microsoft Excel), *.xlsx (Microsoft Excel), *.rtf, *.docx (Microsoft Word), *.mht, *.html, *.txt (text), *.csv, and *.png (image). Perform the following to export a report.

1. Generate a report (see [Section 6.2.2 on page 50](#)).
2. Click the **Export To** drop-down menu.
3. The drop-down menu expands. Click the desired file type.

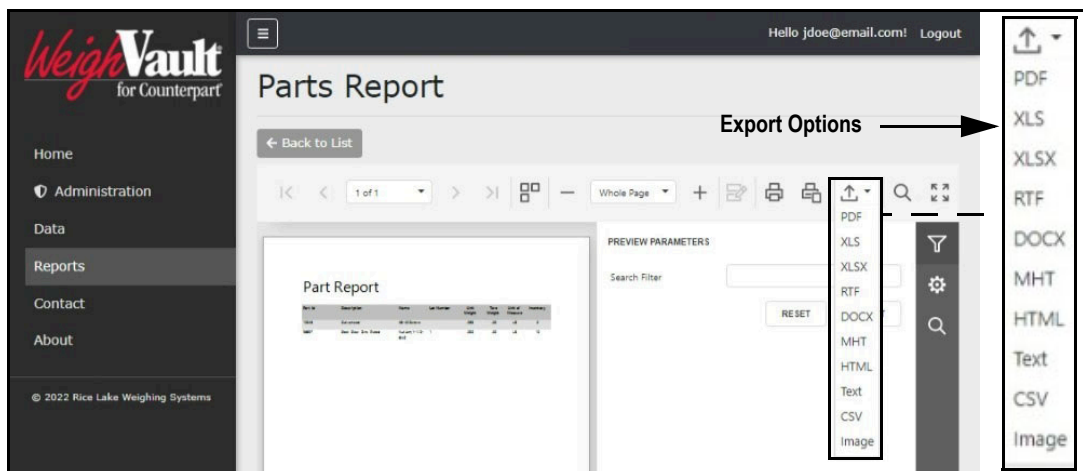



Figure 6-9. Report Export Drop-down Menu Expanded

4. Follow internet browser prompts to finalize the download process.

 **Note** *The installed internet browser and its configuration, determine report export download behavior. The internet browser may automatically download the report, open the Save As window, or request if the file should be downloaded.*

7.0 Troubleshooting

7.1 Access Denied Message

Figure 7-1 illustrates an Access Denied Error Message. This error occurs when a user tries to access a page they do not have access to.

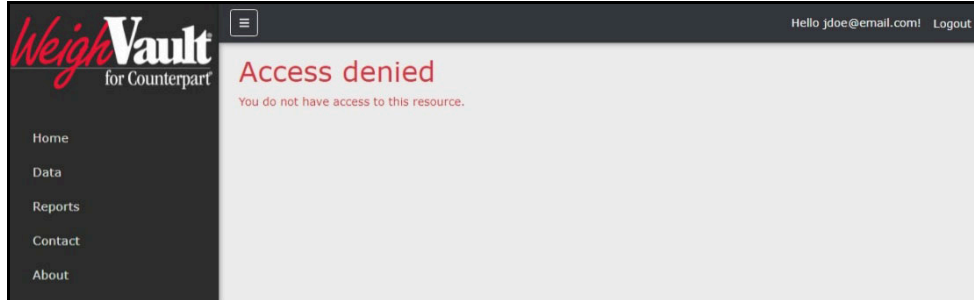


Figure 7-1. Access Denied Message

This error is resolved by requesting the administrator to change the account's Role parameter from None to User. The administrator must access the Edit user function, change the account's role, then click save. For more information about editing accounts, see [Section 4.2.1 on page 30](#).

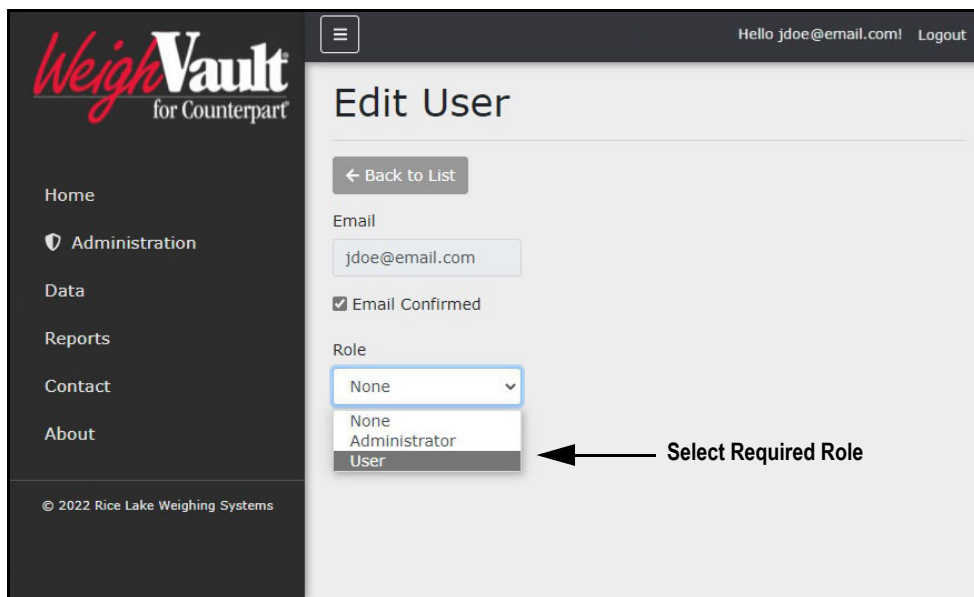


Figure 7-2. Edit User Page with Role Drop-down Menu Expanded



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