To use the screens as a Dashboard in the warehouse, choose *Timed Display*.
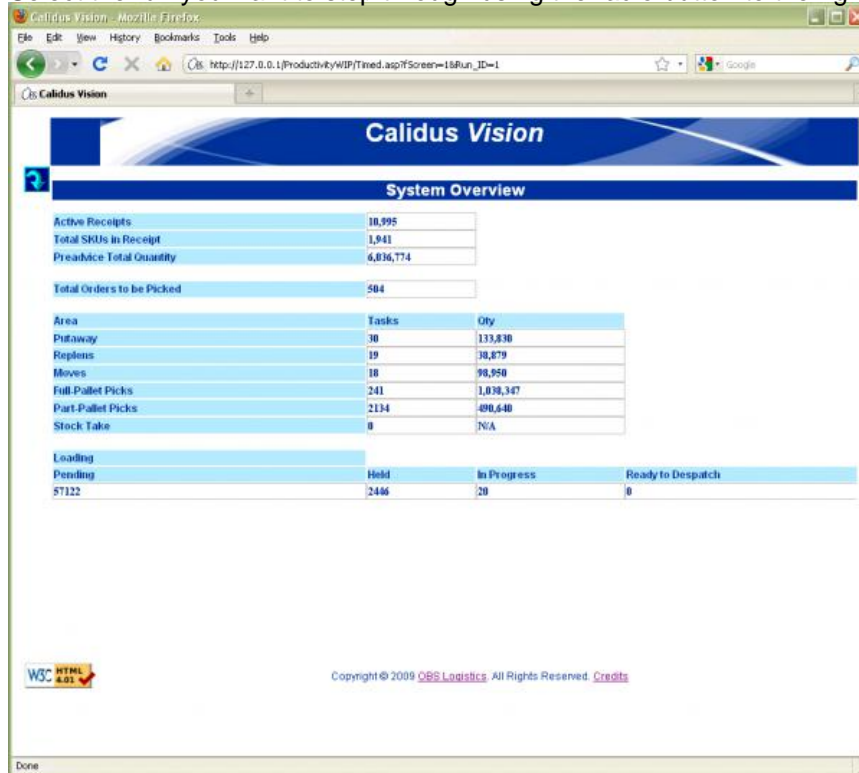

Select the run you want to step through using the radio button to the right of the run, then click **Go** to start the display.

If there is no menu on the left, click the icon to display the menu.

When you want to move to the next screen in the timed display, click *Next Screen* on the menu. When you want to return to the main static display, click *Finish* on the menu.

Contents

Contents

1 Admin

This menu shows all the Calidus Vision administrative screens.

- System Users
- Event Log
- Rules
- Releases
- Names Maintenance
- Extended Extract Parameters
- Menus

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2 Analysis

Analysis screens are broadly categorised as follows:

- Enquiries
- Predictors

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3 Basics

3.1 Basics

The system is access through your web browser. Currently any web browser and screen size is supported, although larger screen sizes can mean better detail and functionality in the screen. Graphs and Charts are provided through Shockwave Flash, and this plug-in must be installed in your browser.

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4 Credits

Calidus *Vision* Credits

CALIDUS Vision — Calidus *Vision* created by and copyright © 2009-2011 OBS Logistics Ltd. All Rights Reserved.
Version: 2.0. Latest Patch: UP110624.

OBS LOGISTICS — Part of the Anisa group of companies.

FusionCharts Free Free Flash Charts. Period. — Charts created by FusionCharts Free.
FusionCharts Free v2.1 by Infosoft Global (P) Ltd.
Email: support@fusioncharts.com
License Agreement can be found here.

W3C HTML 4.01 — All HTML code validated by the World Wide Web Consortium (W3C).

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5 Dashboard

Dashboards are screens that are designed to incorporate small amounts of the normal full-screen data, to allow for quick visibility of the information you need to see. In comparison to normal screens, Dashboards also refresh automatically every minute, to display changed data as soon as possible.
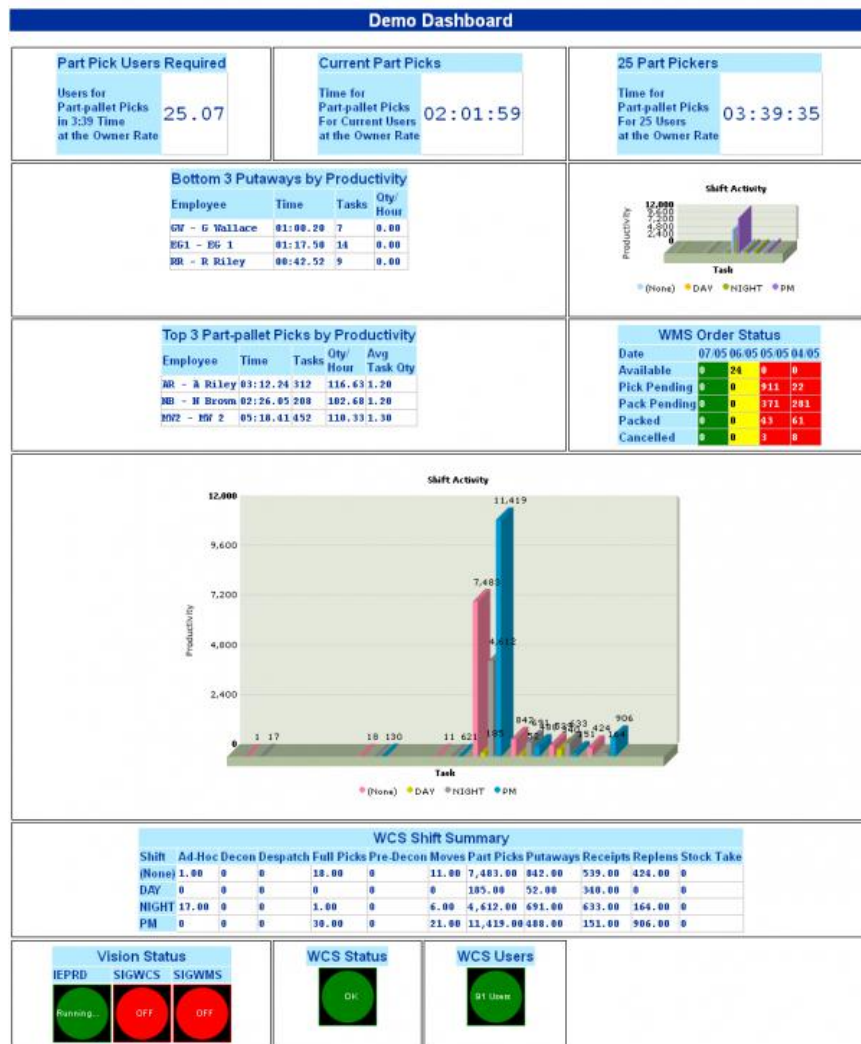
The screen is made up of plug-ins. The design and positioning of the plug-ins on a dashboard is currently undertaken by OBSL, but in the future, Vision will allow you to create your own dashboards.

A dashboard can contain any number of plug-ins, limited only by the screen width - the height will scroll automatically to contain all the plug-ins entered on the screen.

The plug-ins currently available are as follows:

1. Predictor - more information on predictor screens can be found here. The Predictor plug-in allows a pre-defined predictor to be displayed on the screen.
2. Task Productivity - the vast majority of Single Screens are a form of task productivity display, for example, Highest Part Pickers, Putaways Over Target, Current Part Pick Productivity. This plug-in can be configured to display them all, including RAG colouring for comparison versus targets.
3. WMS Order Status - This plug-in displays the orders in the system for today, plus and minus a configurable number of days, to get a view of the progress your operation has made on order completion. This plug-in is identical in function to the Monitor screen of the same name, including drill-down to see the individual orders.
4. Graphs and Charts - All Graphs can be displayed as Plug-ins, and can be resized to fit the space you have available on the dashboard. Currently the WCS Shift Activity Chart is available.

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5. WCS Shift Activity Summary - This summary plug-in is an example of a Summary Screen converted to a plug-in. In time, most summary screens will be available as plug-ins.
6. Vision Status - This plug-in displays the current status of the Calidus Vision Data Mining processes enabled for your system, to indicate if there may be a problem with the system. The traffic lights display Red for Error. Amber for a possible problem and Green for running with no issues. Clicking on the traffic light will take you to the Event Log screen.
7. WCS Status - This plug-in displays a traffic light to indicate if there are any exceptions raised by the WCS RF system. Again, RAG colours indicate Errors, Warnings or system running fine. Clicking on the traffic light will take you to the WCS Current Exceptions screen.
8. WCS Users - This plug-in displays the number of RF users that are logged into your WCS system. Clicking on the traffic light will take you to the WCS Users screen.
9. Warehouse Utilisation - This plug-in displays the percentage utilisation of the warehouse or areas within the warehouse, by location use type (i.e. Pick, Bulk, etc), with RAG colouration. Clicking on the plug-in will take you to the Aisles Utilisation screen.
10. System Overview - This plug-in displays an overview of all the outstanding tasks in the warehouse.
11. Warehouse Summary - This plug-in displays an overview of all tasks completed in the warehouse today.

Note: An annotated version of the dashboard is available:

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6 Did You Know

This guide is intended to help you discover features delivered with your *CALIDUS* system.

6.1 *CALIDUS* Vision

The Calidus Vision system starts by displaying this screen with summary help information.

The header contains some information regarding the system.

- The title of the system, as well as the logged-on warehouse and owner configured against the user.
- The last refresh time and minutes since last data refresh from the host systems are shown on the header. RAG is coloured Red if the data has not been refreshed in the last 15 minutes, Amber if not in the last 10 minutes, otherwise Green.
- When a screen has been selected from the menu, the Auto-refresh option appears in the header, allowing selection of how often the selected screen should refresh. Note that Auto-Refresh does not apply to the menu or Timed Display screens, as these are governed by other parameters. Note also that having this option set when entering data (for example, in the Settings or Admin screens), the refresh will lose any data entered and not saved. The multi-tabbed Quick Screen will also reset on refresh, and a screen will not be shown until the tab is re-selected.

The left side of the screen displays the main menu. This menu is displayed on all screens, except the Timed Display.

Menus can be opened and closed by clicking on them.

- *Quick Menu* show all screens that have been configured by the user for quick access. This menu is open immediately upon accessing the system. If there are quick menus configured (through the *Settings/User* configuration screen), then another screen will be present here, called *Quick Screen* - this presents a tabbed screen with all of the defined quick screens on there. Selecting a tab will show the screen.
- *Summary Screens* show combined views of information designed to give an overview of particular areas quickly and easily.
- *Single Screens* show a single element, usually tailored for a specific purpose.
- *Graphs* show graphical versions of the summary screens. In most cases, clicking on the graph will display the data used to create the graph.
- *Analysis* allows the user to enquire on the productivity data using a series of defined parameters.
- *Monitor* allows the user to view monitoring tools for the mined external systems.
- *Actions* contains the ability for the user to show a Dashboard Timed Display.
- *Settings* allows the user to change several parameters that affect how the system looks, feels and displays.
- *Log Off* logs the user out of the application.

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Each screen in the menu contains a description of what will be displayed - to see this, simply hover the mouse over the screen name.

The first item on the menu allows users to select the screens which are displayed in the main menu. Clicking on the *System* menu entry on the top opens up a pop-up menu, from which you can choose the system you wish to see. Vision defaults to showing all the systems you are set up to see - each screen in this case will be preceded by the system name. To select a specific system, choose it from the pop-up menu. The system will then display the main screen again, with only the selected system's options displayed in the main menu.

The main menu can be shown or hidden using the Pin button on the top. When not pinned, the menu will hide to the left of the screen - floating over the bar will redisplay the menu. This menu pinning functionality can also be controlled through the Web Settings screen.
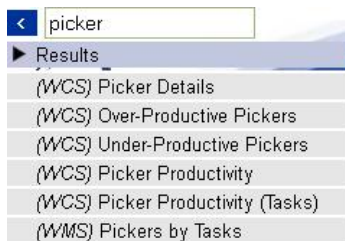
The main menu also has a pop-out toolbar in the top-left corner - click on the **'>'** button to show the following options:

| ‹ | System Help | Help on this screen | Print... | Search... |

- **System Help** - this option starts Calidus Assist on the main page, in a new window or tab.
- **Help on this screen** - this option starts Calidus Assist on the page associated to the screen shown in the main frame, in a new window or tab.
- **Print...** - this option will start your browser's Print dialogue, and will only print the data shown in the main frame.
- **Search...** - this option will display a search box.

| ‹ | |

Typing in the search box will filter all of the available menu items and display a list of all the screens that match.

| ‹ | picker |
| ▶ | Results |
| (WCS) Picker Details |
| (WCS) Over-Productive Pickers |
| (WCS) Under-Productive Pickers |
| (WCS) Picker Productivity |
| (WCS) Picker Productivity (Tasks) |
| (WMS) Pickers by Tasks |

Clicking on an item in that list will start the screen and remove the search box.

Selecting any option on this pop-out toolbar will also close the toolbar. You can also close the toolbar by clicking the **'<'** button.

6.2 *CALIDUS* Assist

6.2.1 Searching for Help

Although all pages from your *CALIDUS* system link directly to the appropriate page in this *CALIDUS* Assist guide, you can search for help on anything in the system using the search bar. It depends on how you have *CALIDUS* Assist configured, but this search bar is normally either in the title at the top of the screen or in the toolbar on the left.

Did you know that you can activate this search at any time using a shortcut key combination? Hover over the Search bar now and you will see it tells you the hot-key combination, typically ALT-F or ALT-SHIFT-F. Hitting those keys together will activate the search box and you can type in what you're looking for. Be aware that these shortcuts are dependent on the browser that you are using, so check for compatibility first.

If you know the name of the page, just type it there and click the **Go** button. If you want to search for any text in the page, click the **Search** button instead, or just hit enter for *CALIDUS* Assist to do it for you. Typically, as you type, the search bar will quickly offer you some matches that might be what you're looking for - if it is, just click the suggestion and Assist will take you there.

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6.2.2 Searching Tables

A lot of the pages have tables of data on them - this can be a bit difficult to see what you're after. So, in the cases where there is a large amount of data in tables, we have made the tables searchable.

On top of the table will be a search box. Type in what you're looking for and the table will be filtered to show all of the matching rows - that is, rows where any column contains that text at all, anywhere. This filters as you type.

Note that some data will be always be shown, like headers, or rows that the writers of the page have decided must always be shown.

You can clear the text out of the search box and this will display everything again - do this by either deleting it or use the provided clear button to the right of the search box.

Have a go below - maybe try entering "ap", then "app", or enter "fruit" and see the way it works.

Fruit	Some Text - this header row is always shown
Apple	Green apples
Orange	Not an apple
Pineapple	Also not
Grapefruit	Very big!
Banana	I like bananas, so I'm always going to show them
Kumquat	Interesting fruit
Grape	Small fruit
Tomato	Is this a fruit or a vegetable?

6.2.3 Translating

The toolbox contains a link to Google Translate to translate the page into a language of your choice. Select the language from the drop-down list, and Google will translate the whole page for you.

6.2.4 Printing and Exporting

You can export pages from *CALIDUS* Assist using the *Print as PDF* or *Download as PFD* link. Where this appears depends on the style the Assist is configured with, but by default this link will be in the *Toolbox* menu on the left of the screen, or on the tabs at the top right of the screen.

You can export categories as a full document in the same way - all pages in that category will be included in the PDF in the order in which they are listed in the category.

We've typically also included a link in the description of categories where this will export as a document, and we also add the DOC button next to documents that you can download from the first page of Assist.

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7 Edit Screens

To return to the *Run Settings* screen, click **Back to Settings**.

You can search for screens in either panel by entering text in the associated *Find* boxes - matching screens will be bubbled to the top of the list.

To select the screens to be displayed in this run, select the screen on the left pane and click the button to move the screen to the Selected Pane. You can select multiple screens at a time by holding the CTRL key, or a range of screens by holding the SHIFT key whilst clicking.

The buttons to move between **Available** and **Selected** are, from top to bottom:

- **->** Move the indicated Available screen(s) to the Selected screens pane.
- **<-** Remove the indicated Selected screen(s) from the Selected screens pane.
- **>>** Move all the Available screens to the Selected screens pane.
- **<<** Remove all the Selected screens from the Selected screens pane.

When selected, the sequence of the screens can be changed using the buttons:

- **^^** Move to top
- **^** Move up
- **v** Move down
- **vv** Move to bottom

Once you have selected all the screens to be displayed in the run, click **Save** to save the settings.

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8 Enquiries

Enquiries allow the user to select the data through a variety of parameters:

Parameters available:

- *Report By* - You can choose the Sort mechanism by choosing from the **Report By** drop-down list.
- *Task Type* - You can choose the Task Type to be displayed by choosing from the **Task Type** drop-down list.
- *Timescale* - The timescale of the query can be set using the **Timescale** drop-downs. This allows selection of various intervals (Day, Week, Month or Quarter), as well as specifying how you want to select (Current, All, Specific or Range of intervals). If Specific Or Range is specified, the user can use a pop-up calendar to identify the interval.
- *Direction* - The direction of the sort using the **Direction** drop-down list. If no direction is chosen, the data is not sorted.
- *Level* - Select an individual employee, report summary or detail information. The summary level of the report can be chosen using the **Level** drop-down list.
- *Limit* - You can limit the amount of data shown on the screen using the **Limit** drop-down list.

Type in text in the drop-down lists to search for the entry - the list will filter.

Click **Go** to execute the query.

You can change the query selection and re-run the query by clicking the **Change Enquiry Selection** button.

When data has been loaded, the enquiry will paginate the data for you - buttons are provided on the bottom of the table to navigate the data.

The data can be sorted by clicking on the column titles. Multiple sorts can also be performed by holding the SHIFT key whilst clicking.

The data displayed can be quickly filtered using the search box provided. Entering search criteria here will match against any data similar to it in any of the columns in the table. The table will indicate in the status bar whether the data is filtered.

You can export the data using the **Export to CSV**. Depending on the system settings, this will either be to a plain CSV file or in styled HTML format. The browser will open the application necessary to view this file.

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There are several enquiries within Vision and they support all or most of the features described above.

Name	Description
WCS	
Detail Enquiry	An historical enquiry with multiple selection criteria and sort options
Extended Detail Enquiry	Enquire on the detals of the Extended productivity data extracts.
Extended Productivity Enquiry	Enquire on the detals of the Extended productivity data extracts.
Orders - time to completion	A screen to show the estimated time to complete the current part-picks in the system, with the currently-connected users.
Productivity Enquiry	Task Productivity Enquiry, per employee, highlighting the productivity of the operatives versus the minimum and target productivity figures.
20 Day Performance	20 Day Performance Report
Extended 20 Day Performance	Extended 20 Day Performance Report
Idle Time Enquiry	Enquire on the idle time of an employee, compared to the shift time applied to them
WMS	
Detail Enquiry	Enquiry to show productivity of users.

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9 Event Log

This screen allows the user to view the logging created from the data mining scripts.

Choose the data mining script from the drop-down, then click **Go** to view the last log messages created for this process.

If *All* is selected, the screen will display the Event Name column.

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10 Extended Extract Parameters

This screen allows the user to maintain the user-defined parameters for extended data extractions.

Extended Extract Parameters Maintenance

System TEST - [ ] Go

Select the extraction from the list and press **Go** to display all parameters from this extraction.

39	OrderType - DTP	Truck Move.To Location	MARDTP
40	OrderType - Wholesale	Truck Move.To Location	MAR010 MAR101 MAR102 MAR103 MAR104 MAR105 MARWHL MAW004 MAW005 MAW006 MAW007 MAW008 MAW009 MAW010 MAW011 MAW012 NETFRI NETMON NETTHU NETTUE NETWED
41	OrderType -	Truck Move.Movement Type	P
42	OrderType -	Picking.Type	P
38	OrderType - Wholesale	Truck Move.Priority	1 2 3
46	OrderType - Wholesale	Truck Move.Owner Code	A92
47	OrderType - Wholesale	Truck Move.Priority	5
48	OrderType - Wholesale	Truck Move.Owner Code	D33
49	OrderType - Wholesale	Truck Move.Priority	6

Save Reset

All parameters you are allowed to change will have a method for entering them - if you are limited to one owner, you will only be able to edit that owner's parameters.

Click **Save** when finished. Click **Reset** to reset all changes.

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11 Extended Extractions

Vision has the capability of splitting the mined system and productivity data into smaller sub-groups.

These Extended Data Extracts are displayed in screens similar to the Single and Summary screens, but are split onto a separate menu for convenience.

As these Extended Data Extracts are bespoke to the installation, the types of screens displayed here can vary from installation to installation.

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12 Extended Productivity

|					
Productivity Settings					
Name	Company	Warehouse	Owner	Min	Target
Ambient High	OBS	OBS	A92	20	30
Ambient High	OBS	OBS	D33	20	30
Ambient Low	OBS	OBS	A92	20	30
Ambient Low	OBS	OBS	D33	20	30
CD Low	OBS	OBS	D33	20	30
Chill High	OBS	OBS	A92	20	30
Chill High	OBS	OBS	C48	20	30
Chill High	OBS	OBS	D33	20	30
Chill Low	OBS	OBS	A92	20	30
Chill Low	OBS	OBS	C48	20	30
Chill Low	OBS	OBS	D33	20	30
Export High	OBS	OBS	D33	20	30
Export Low	OBS	OBS	D33	20	30
Post High	OBS	OBS	C48	20	30
Post Low	OBS	OBS	C48	20	30
Wholesale High	OBS	OBS	A92	20	30
Wholesale High	OBS	OBS	C48	20	30
Wholesale High	OBS	OBS	D33	20	30
Wholesale Low	OBS	OBS	A92	20	30
Wholesale Low	OBS	OBS	C48	20	30
Wholesale Low	OBS	OBS	D33	20	30

Save   Reset

This screen allows you to maintain the minimum and target productivity figures for extended data extracts. When you have set the values as desired, click **Save**.

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13 Graphs

Graphs show graphical versions of the summary screens.
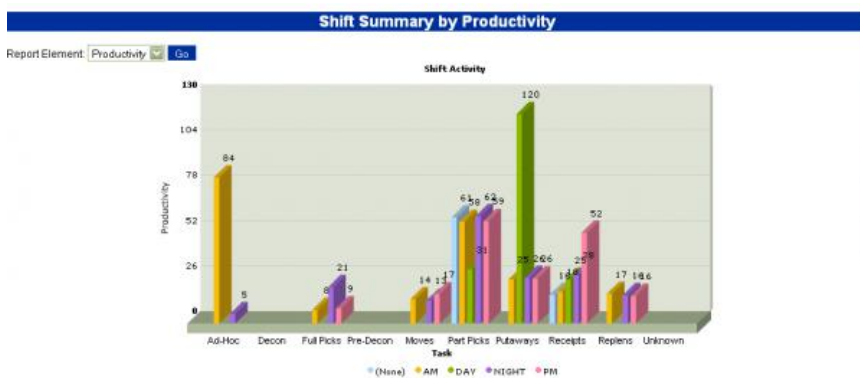
In most cases, clicking on the graph will display the data used to create the graph.

Name	Description
WCS	
Loading Tasks	A Pie Chart to show the loading tasks
Pick and Loading	A graph of Highest Picker Productivity, plus a pie chart of the Loading tasks on the system
Pick Productivity	A graph to show the Highest 10 productive Pickers
Shift Summary Graph	A graph to compare the productivity/tasks completed of all the shifts in all the task types.
Warehouse Summary Graph	A Pie chart showing the percentage of tasks completed in the warehouse, per task type.
Warehouse Weekly Summary Graph	A line graph of the productivity figures achieved and number of tasks completed for the last 7 days, by task type, for the warehouse
WMS	
Shift Summary Graph	A graph to compare the tasks completed of all the shifts in all the task types.
Warehouse Summary Chart	A Pie chart showing the percentage of tasks completed in the warehouse, per task type.
Warehouse Weekly Summary Graph	A line graph of the tasks completed for the last 7 days, by task type, for the warehouse.

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14 Log On

Users will be pre set up. Use the user names and passwords provided to log on to the system.

Login	
User-ID	
Password	
Log On	Clear

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15 Look and Feel

15.1 Look and Feel

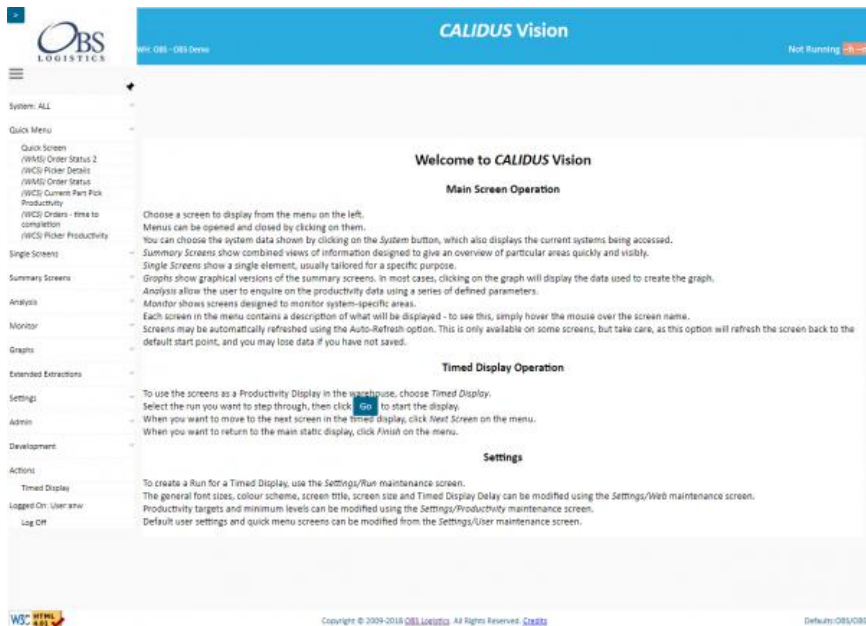Several different styles have been created based on client web sites:
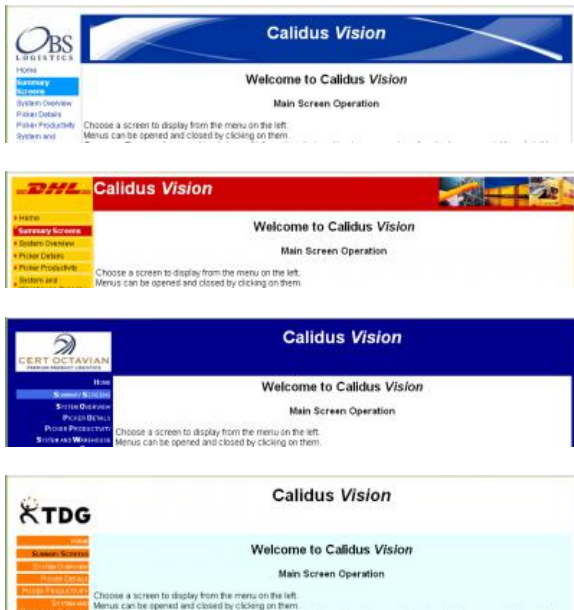
A specific look and feel can be tailored to your need by the OBS development team.

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16 Main Screen (HOME)

The Calidus Vision system starts by displaying this screen with summary help information.

The header contains some information regarding the system.

- The title of the system, as well as the logged-on warehouse and owner configured against the user.
- The last refresh time and minutes since last data refresh from the host systems are shown on the header. RAG is coloured Red if the data has not been refreshed in the last 15 minutes, Amber if not in the last 10 minutes, otherwise Green.
- When a screen has been selected from the menu, the Auto-refresh option appears in the header, allowing selection of how often the selected screen should refresh. Note that Auto-Refresh does not apply to the menu or Timed Display screens, as these are governed by other parameters. Note also that having this option set when entering data (for example, in the Settings or Admin screens), the refresh will lose any data entered and not saved. The multi-tabbed Quick Screen will also reset on refresh, and a screen will not be shown until the tab is re-selected.

The left side of the screen displays the main menu. This menu is displayed on all screens, except the Timed Display.

Menus can be opened and closed by clicking on them.

- *Quick Menu* show all screens that have been configured by the user for quick access. This menu is open immediately upon accessing the system. If there are quick menus configured (through the *Settings/User* configuration screen), then another screen will be present here, called *Quick Screen* - this presents a tabbed screen with all of the defined quick screens on there. Selecting a tab will show the screen.
- *Summary Screens* show combined views of information designed to give an overview of particular areas quickly and easily.
- *Single Screens* show a single element, usually tailored for a specific purpose.
- *Graphs* show graphical versions of the summary screens. In most cases, clicking on the graph will display the data used to create the graph.
- *Analysis* allows the user to enquire on the productivity data using a series of defined parameters.
- *Monitor* allows the user to view monitoring tools for the mined external systems.
- *Actions* contains the ability for the user to show a Dashboard Timed Display.
- *Settings* allows the user to change several parameters that affect how the system looks, feels and displays.
- *Log Off* logs the user out of the application.

Each screen in the menu contains a description of what will be displayed - to see this, simply hover the mouse over the screen name.

The first item on the menu allows users to select the screens which are displayed in the main menu. Clicking on the

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System menu entry on the top opens up a pop-up menu, from which you can choose the system you wish to see. Vision defaults to showing all the systems you are set up to see - each screen in this case will be preceded by the system name. To select a specific system, choose it from the pop-up menu. The system will then display the main screen again, with only the selected system's options displayed in the main menu.

The main menu can be shown or hidden using the Pin button on the top. When not pinned, the menu will hide to the left of the screen - floating over the bar will redisplay the menu. This menu pinning functionality can also be controlled through the Web Settings screen.

The main menu also has a pop-out toolbar in the top-left corner - click on the **'>'** button to show the following options:

- **System Help** - this option starts Calidus Assist on the main page, in a new window or tab.
- **Help on this screen** - this option starts Calidus Assist on the page associated to the screen shown in the main frame, in a new window or tab.
- **Print...** - this option will start your browser's Print dialogue, and will only print the data shown in the main frame.
- **Search...** - this option will display a search box.

Typing in the search box will filter all of the available menu items and display a list of all the screens that match.

Clicking on an item in that list will start the screen and remove the search box.

Selecting any option on this pop-out toolbar will also close the toolbar. You can also close the toolbar by clicking the **'<'** button.

17 Menus

The Menu editing forms allow the user to maintain and change menus that are then assigned to users on the User Settings form.

17.1 Groups

A Menu Group is created in this screen. The Menu Group collates a selection of menus together, for display on the Calidus Vision main menu.

The descriptions of the Groups can be maintained here by adding the description and clicking **Save**. Any changes can be discarded by using the **Reset** button. A Group can be deleted by selecting it using the radio button provided and click the **Delete** button.

Menu Groups can be created here by using the **Add** button.

Once the new Group name and description has been entered, click the **Save** button. The Group can be created as a copy of an existing Group by selecting an existing Group from the drop-down list provided.

The menus associated to the Group can amended using the **Edit Menus** button.

17.2 Group Menus

This form can be used to allocate menus to a group.

The buttons in sequence from left to right and top to bottom are as follows

- Centre Buttons
    - To move all Available Menus to a Group, click the double right arrow.
    - To allocate a Menu to a Group, select it from the Available menus on the left list and click the single right arrow.
    - To remove a Menu from a Group, select it from the Selected menus on the right list and click the single left arrow.

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♦ To remove all Selected Menus from a Group, click the double left arrow.
• Right Buttons:
♦ To move a selected Menu to the top of the list, select it from the Selected menus on the right list and click the segmented up arrow.
♦ To move a selected Menu up one place in the list, select it from the Selected menus on the right list and click the up arrow.
♦ To move a selected Menu down one place in the list, select it from the Selected menus on the right list and click the down arrow.
♦ To move a selected Menu to the bottom of the list, select it from the Selected menus on the right list and click the segmented down arrow.

The Screens in each list can be filtered by typing in the 'Find' box associated to the list.

When all changes have been made, click the **Save** button

To edit the contents of the Menus, click the **Edit Menus** button.

To return to the Groups screen, click the **Back to Groups** button.

17.3 Menus

This form is used to edit the screens contained within a menu. This form can be found from the *Group Menus* screens and from the *Admin* menu by default.

The descriptions of the Menu can be maintained here by adding the description and clicking **Save**. Any changes can be discarded by using the **Reset** button. A Menu can be deleted by selecting it using the radio button provided and click the **Delete** button.

A new Menu can be created here by using the **Add** button.

Once the new Menu name and description has been entered, click the **Save** button. The Menu can be created as a copy of an existing Menu by selecting an existing Menu from the drop-down list provided.

The Screens associated to the Menu can amended using the **Edit Screens** button.

The buttons available here are the same as those in the Group Menus screen, as is the general functionality of the screen.

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When all changes have been made, click the **Save** button

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18 Metapack Status

This screen shows the status of all orders from a Metapack perspective, for a configurable number of days. The status of the order shows whether it has been:

- Sent
- Errored

Date/Time	Order	Status	Description
22/06/2011 13:17.59	0090000020110622EX14	Sent	
22/06/2011 13:16.44	0090000020110622DX14	Sent	
22/06/2011 13:16.44	0090000020110622BX14	Sent	
22/06/2011 13:12.02	0090000020110622FX14	Sent	
22/06/2011 13:11.51	0090000020110622CX14	Sent	
22/06/2011 13:11.51	0090000020110622AX14	Sent	
22/06/2011 09:48.53	0090000020110622DX13	Error	Unable to assign a carrier to
22/06/2011 09:48.53	0090000020110622FX13	Sent	
22/06/2011 09:48.49	0090000020110622CX13	Sent	
22/06/2011 09:48.49	0090000020110622EX13	Error	E20006 Invalid postcode 'HS1 2
22/06/2011 09:48.49	0090000020110622AX13	Sent	
22/06/2011 09:44.05	0090000020110622CX12	Sent	
22/06/2011 09:44.05	0090000020110622AX12	Sent	
22/06/2011 09:35.52	0090000020110622AX10	Sent	
22/06/2011 09:35.52	0090000020110622CX10	Sent	
22/06/2011 09:28.06	0090000020110622AX09	Sent	
22/06/2011 09:28.06	0090000020110622CX09	Sent	
22/06/2011 09:25.05	0090000020110622CX08	Sent	
22/06/2011 09:25.05	0090000020110622AX08	Sent	
22/06/2011 09:14.47	0090000020110622AX06	Sent	
22/06/2011 09:14.47	0090000020110622CX06	Sent	
22/06/2011 09:09.57	0090000020110622CX05	Sent	
22/06/2011 09:09.57	0090000020110622AX05	Sent	
22/06/2011 09:04.24	0090000020110622CX04	Sent	
22/06/2011 09:04.24	0090000020110622AX04	Sent	
22/06/2011 08:45.37	0090000020110622CX01	Sent	
22/06/2011 08:45.37	0090000020110622AX01	Sent	
22/06/2011 08:30.50	0090000020110621FX01	Sent	

19 Monitor

Monitor screens are bespoke to the systems being mined. Essentially they are screens designed to show the status of individual portions of the external systems, to aid in problem-solving.

A selection of these screens is shown below:

- Dashboard
- WMS
  - ♦ Order Status
  - ♦ Metapack Status
  - ♦ Warehouse Utilisation
- WCS
  - ♦ Time To Completion - Order, Replens, Moves.
  - ♦ WCS Alerts
  - ♦ Users - Details
  - ♦ Users Logon Details

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20 Names Maintenance

Names Cross-reference Maintenance		
Type	Code	Description
OWNER	119	Owner 1
OWNER	A35	Owner 2
OWNER	A92	Owner 3
OWNER	C48	Owner 4
OWNER	D23	My Owner
OWNER	D33	Owner 5
OWNER	E45	Owner 6
WAREHOUSE	130	Warehouse 1
WAREHOUSE	860	Warehouse 2
WAREHOUSE	LEI	Leicester
WAREHOUSE	LUT	Lutterworth
WAREHOUSE	OBS	OBS Demo
WAREHOUSE	W05	Warehouse 3
WAREHOUSE	W15	Warehouse 4

Save   Reset   Reload App with New Settings

This screen allows the user to maintain the displayed names for system codes mined from external systems.

The '**Type'** column shows the type of name being maintained, the '**Code'** shows the extraced code, and the user is allowed to maintain the '**Description'** data.

Click **Save** when finished.

As these descriptions are also displayed on the Vision heading bar, click **Reload App with New Settings** to refresh the main screen.

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21 Order Status

The Order Status screens show the current status of the operation's orders, by status.

There are several screens in this category:

- Order Status - A summarised set of Date and Order Statuses.
- Order Status 2 - A summarised set of Date and Order Statuses, breaking down by Order Type and Carrier/Customer, with summary quantities.
- Order Details - a detailed view of orders with summaries of the quantities on each order, with an indication of the progress.
- Orders In Progress - a summarised set of Date and Customer Class, with actual and expected figures.

21.1 Order Status

This screen summarises horizontally, showing a number of days forward and back, as defined in the system Rules.

Days in the past are coloured the system Error colour, whilst days in the future are coloured the system Information colour.

A summary of all the orders at each order status is shown for each day.

The user can click on a value to be taken to the detail screen.

Order Status										
Date	21/07	20/07	19/07	18/07	17/07	16/07	15/07	14/07	13/07	12/07	11/07
Available	0	0	24	0	0	0	0	0	0	0
Pick Pending	0	0	0	911	22	0	0	0	0	0
Pack Pending	0	0	0	371	281	5	0	0	0	0
Packed	0	0	0	43	61	7	0	0	0	0
Cancelled	0	0	0	3	8	7	18	7	14	12	16

21.2 Order Status 2

This screen summarises vertically, showing a number of days forward and back, as defined in the system Rules.

Days in the past are coloured the system Error colour, whilst days in the future are coloured the system Information colour.

A summary of all the orders at each order status is shown for each day, order priority and group, defined in the rules, which can be carrier, customer or extracted from the customer up to the first space (bespoke).

Configurably, a total of the order quantities can be displayed as well as the number of orders, the format of which is also configurable.

The results can be sorted using the column headings, and all the results can be searched using the provided Search text box.

The user can click on a value to be taken to the detail screen.

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Order Status

Due Out Date	Order Type	Carrier	Available	Pick Pending	Pick Confirmed	Packed	Despatched
23/07/2018							1
23/07/2018	High Priority		8 (560/0)		5 (1,484/0)	3 (1,540/0)	63
23/07/2018	High Priority	Buf					10
23/07/2018	High Priority	Don					17
23/07/2018	High Priority	Fre					5
23/07/2018	High Priority	LEE					30
23/07/2018	High Priority	NFT	4 (212/0)		13 (5,704/0)	30 (3,770/0)	44
23/07/2018	High Priority	SAM					14
23/07/2018	High Priority	Tro					17
24/07/2018	High Priority		39 (12,198/0)	59 (21,480/0)		21 (5,520/0)	
24/07/2018	High Priority	LEE					1
24/07/2018	High Priority	NFT	4 (694/0)	2 (443/0)		7 (879/0)	

21.3 Order Details

This screen shows the individual orders at this status selected from the main screen.

The screen is configurable as to what details are shown in each column, and the columns displayed may be amended by clicking the **Select Columns** button provided - the screen will remember the settings.

The *Order* column includes a popup with any other order references configured for the system - hover over the displayed order reference for additional details.

The *Route/Load/Trip* column includes a popup with TMS Trip references configured for the system - hover over the displayed Route/Load for additional details. If no load is present, hover over the provided Info icon .

💡 **Note:** Both of the above columns are configurable as to what data is displayed in the cell and in the popup, so your screen may show different data - the principles of operation remain the same.

If the order is currently being picked or packed, the screen may also tell you the current user assigned to that order and the last location visited.

Totals are displayed on the table and the table allows sort and searching. Individual columns may be searched using the search box on the column header, and the whole table data may be searched using the *Search* box in the top-right. Totals will dynamically recalculate when filters are applied.

💡 **Note:** Search boxes also search on the hidden popup details as well.

The Status field displays more information about the orders and also controls some RAG colouration, as follows:

- For *Pick Pending* status, the status is broken down as follows:
  - ♦ *All Complete* - The order has no more pick tasks outstanding to complete, but the status is still Pick Pending, so the order may require manual confirmation.
  - ♦ *Tasks Outstanding* - the order still has pick tasks outstanding
  - ♦ *Partially Allocated* - the order is only partially allocated, and therefore the order will not be pick confirmed until the allocation of stock is finalised.
- *Pick Pending (All Complete)* - Red
- *Pick Pending* - Amber
- *Pick Confirmed* - Green
- *Packed* - Green

The RAG colouring of each status is configurable in the *Admin/Rules* screen, from section '*Order Status Settings*, using the rules *"Order Status X RAG"*, where X is the order status. The RAG types Error, Warning or Information can be selected, which then colours the data in the configured system RAG colours of this type.

The User column displays either the last person picking the order or the packer ID, depending on the status of the order. To filter only orders that have a user, enter '-' in the User-column filter box.

The screen is also available directly from the *Monitor* menu as *Order Details*. If run in this way, the screen displays all order from today only by default, although the number of days included forward from today can be configured in the

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>>>>>>>

Admin/Rules screen, from section **Order Status Settings**, rule *"Order Status Details - Days"*.

The results shown can also be exported in a variety of ways, using the provided **Export** button. Depending on the choices, this might be all of the data (whether it is displayed or not) or just the data shown on the table.

21.4 Orders In Progress

This screen provides a summarised set of Date and Customer Class, with actual and expected figures.

Clicking on the screen will show all orders over all days reported summarised by WMS customer class. If the orders have no class, they are grouped into Non-Common.

The days reported (forward and back) are the same as the Order Status screens and governed by the same rules.

The results are paginated using the buttons and limiting the number of entries, and sorted by clicking on the column headings. Individual columns may be searched using the search box on the column header, and the whole table data may be searched using the Search box in the top-right. All data on the screen is totalled in the total line. Totals will dynamically recalculate when filters are applied.

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22 Predictors

Predictor screens are designed to give an indication of the amount of time it will take to complete particular tasks in the warehouse, utilising the staff currently logged into the system.

The screens use the mined data to perform this prediction, as follows:

- The amount of these tasks outstanding in the system.
- The number of users currently logged on to this task type in the system.
- The current productivity rate being achieved for this task in the warehouse.

The screen will display the time remaining to complete these tasks.

Note: If the user has a default Owner set up, the predictor will only use the Owner-related information to calculate the time remaining.

Rules can be changed to identify the colouration of the estimated time remaining, depending on whether the time remaining breaks a forthcoming shift boundary. See the Rules Maintenance screen for details.

Predictors can be pre-created 'Time to Completion' screens, or user-defined.

22.1 'Time to Completion'

Part-picks - Estimated Time to Completion		
Part pick tasks and Productivity rates		
	Qty	Cases
Part-Pallet Picks	3,450	7,323
Part-pallet Picks Rate	50.70	80.04
Connected Users by Activity		
Activity	Users	
Pick	45	
Estimated Time to Completion		
Part-pallet Picks ETA	2.03	

22.2 User-Defined Predictors

User-defined Predictors are maintained and displayed through a separate screen, seen here.

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23 Printing

Printing screens from *CALIDUS* Vision is accomplished through several means.

- The Popup Toolbar Print option
- CSV/Formatted Output.
- Use the browser's frame printing ability.
- Where available, through table Export functionality.

23.1 Popup Toolbar Print Option

The main screen has a pop-out toolbar in the top-left corner - click on the **'>'** button and choose the **Print...** option. This will start your browser's Print dialogue, and will only print the data shown in the main frame.

Selecting any option on this pop-out toolbar will also close the toolbar. You can also close the toolbar by clicking the **'<'** button.

23.2 CSV/Formatted Output

Enquiries allow you to export data to CSV or formatted output. Once this is exported, you can print from the application that opens the data file.

23.3 Browser Printing

This is different from browser to browser and the main browsers' mechanisms are summarised below:

23.3.1 Mozilla Firefox

Right-click on the data frame (i.e. where the data is being displayed rather than the main frame with the header and menu) and choose **This Frame>Print Frame**.

23.3.2 Microsoft Internet Explorer

Select **File>Print** then click **Options**. Ensure the option 'Only the selected frame' is chosen, then click **Print**.

23.3.3 Google Chrome

Right-click on the data frame (i.e. where the data is being displayed rather than the main frame with the header and menu) and choose **Open in new tab/window**. Once this has opened, print the frame using the normal print command.

23.3.4 Opera

Right-click on the data frame (i.e. where the data is being displayed rather than the main frame with the header and menu) and choose **Frame>Open/Open in new tab**. Once this has opened, print the frame using the normal print command.

23.4 Table Export

Where available, this feature is accessed using the provided **Export** button on the table. The system will offer a variety of export options:

- **Copy** - All columns and rows in the table, regardless of search or column visibility, will be copied to the local machine's paste buffer. This can be pasted into any local application for formatting and printing.

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- **CSV** - The application will generate a CSV (comma-separated values) file and (dependent on Browser settings) will either open this in the local PC's chosen application, or in the browser window or new tab, or offer to save the file to the local machine. In all cases, the data is raw CSV and unformatted. All columns and rows in the table, regardless of search or column visibility, will be exported.
- **Excel** - The application will generate a Microsoft Excel (tm) file and (dependent on Browser settings) will either open this in the local PC's chosen application, or in the browser window or new tab, or offer to save the file to the local machine. In all cases, the data is basically formatted. All columns and rows in the table, regardless of search or column visibility, will be exported.
- **PDF** - The application will generate an Adobe PDF (tm) file and (dependent on Browser settings) will either open this in the local PC's chosen application, or in the browser window or new tab, or offer to save the file to the local machine. In all cases, the data is formatted. Note that this feature is currently experimental. All columns and rows in the table, regardless of search or column visibility, will be exported.
- **Print** The application will open a new browser tab or window and will generate a plan page containing only the table's data. The browser's print dialogue will open, allowing the page to be printed. On completion, this tab will close. All rows in the table, regardless of search, will be exported. Only columns selected will be shown.

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24 Productivity

				Receipts	Putaways	Moves	Replens	Full Picks	Part Picks	Decon
Comp	Whse	Own								
OBS	OBS		Min	50	5	5	5	11	45	50
			Target	100	41	21	20	15	60	50
OBS	OBS	E45	Min	50	5	5	5	11	45	50
			Target	100	41	21	20	15	60	50

Productivity Settings

Save   Reset

This screen allows you to change the module minimum and target productivity figures. When you have set the values you want, click **Save**.

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25 Releases

This screen allows users to see the history of software releases that have been made to this implementation of the Vision application.

To view the information click the release name for details of the amendments made in that release.

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26 Rules

This screen allows users to amend the system rules.
Warning: modifying the values of these rules affects the running of the system and, as such, could result in unpredictable productivity rates or a non-running system.

- Clicking on a title will display the rules associated to that title.
- Rules can be held against any title level.
- Rules are displayed on the right-hand side of the screen.
- Depending on the setup and validation criteria set against the rule, the screen will display an appropriate entry box and allow the user to change the value.
- Once changed, click **Save** to save the changes.

Rules currently available for modification are:

System Settings

- *Measurement Method* The mechanism by which Vision calculates the length of a task.
- *Export Type* Choose the format of exports from Analysis Enquiry screens.
- *Format Time* Format time in screens as a time. If disabled, this leaves the time as seconds only.
- *Productivity Format* Format of the Productivity figure - either Tasks per hour or Total Task Qty per hour
- *Animate main screen* If enabled, the main menu and toolbars will animate on show and hide.
- *Quantity Format* The format of the quantity displayed (total unit Quantity, Cases only or Cases/Units)
- **Cleardown Settings**
    - ♦ *Clear Daily Details* The period to keep for the calculated daily task productivity figures (in days).
    - ♦ *Clear Weekly Details* The period to keep for the calculated weekly task productivity figures (in weeks).
    - ♦ *Clear Monthly Details* The period to keep for the calculated monthly task productivity figures (in months).
    - ♦ *Clear Quarterly Details* The period to keep for the calculated quarterly task productivity figures (in quarters).
    - ♦ **WCS Data**
        - ◊ *Clear Mined WCS Activity Records* The period to keep for the mined WCS Activity Records (in days).
    - ♦ **WMS Data**
        - ◊ *Clear Mined WMS Audit Records* The period to keep for the mined WMS Audit records (in days).
    - ♦ **Vision Data**
        - ◊ *Clear Vision Event Log* The period to keep for the Vision logging of interface events (in days).
- **RAG Settings**
    - ♦ *Error Background Colour* The colour used by Vision to display errors, or productivity levels less than the minimum level.
    - ♦ *Error Foreground colour* The colour used by Vision to display errors, or productivity levels less than the minimum level.
    - ♦ *Warning Background Colour* The colour used by Vision to display warnings, or productivity levels within the target and minimum levels.
    - ♦ *Warning Foreground Colour* The colour used by Vision to display warnings, or productivity levels within the target and minimum levels.
    - ♦ *Info Background Colour* The colour used by Vision to display informational messages, or productivity levels greater than the target
    - ♦ *Info Foreground Colour* The colour used by Vision to display informational messages, or productivity levels greater than the target

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- **Order Status Settings**
  - ♦ *# Order Days Forward* The number of days ahead of today's date to retrieve Order Status information.
  - ♦ *# Order Days Back* The number of days before today's date to retrieve Order Status information.
  - ♦ *WMS Order Status Date* The name of the field in WMS used to determine the date of the order in the Vision Order Status screen.
  - ♦ *Group By* How to group the order status results. Select from the list: Carrier, Customer or Bespoke (Customer up to 1st Space).</option></select>
  - ♦ *Quantity in Summary* Whether the formatted quantity is displayed in the Order Status Summary screen.
  - ♦ *Display Order Number* Whether the WMS Order Number is displayed in the Order Status Details screen
  - ♦ *Display Order Reference* Whether the WMS Order Reference is displayed in the Order Status Details screen
  - ♦ *Display P/O Reference* Whether the WMS Customer P/O Reference is displayed in the Order Status Details screen
  - ♦ *Display Route/Load* Whether the Route and Load are displayed in the Order Status Details screen
  - ♦ *Display TMS Trip* Whether the TMS Trip ID is displayed in the Order Status Details screen
  - ♦ *Order Status Details - Days* When Order Status Details is run from the menu, how many days forward to show from today.
  - ♦ *Order Status X RAG* How to colour the Order Status in the screens. There is one rule for each order status.
- **Time To Completion Settings**
  - ♦ *Shift End #* The time at which the shift ends (up to 3). This is used by the Orders Time to Completion screen to determine whether the amount of time remaining breaks the next boundary set in these times.
  - ♦ *Shift End # Format* The format to be applied (up to 3) should the Shift End boundary associated with this format be exceeded by the time to complete the orders. If the boundary is exceeded, the display will be RAG coloured (Error/Warning colours are taken from the RAG rules settings).
- **Order Metapack Status Settings**
  - ♦ *# Order Days Back* The number of days (inclusive of today) to extract Metapack Status records from the host system. Examples: Today is 1, yesterday is 2, all is 0.
- **Idle Time RAG Settings**
  - ♦ *% of Active Hours to Warning* The percentage of the hours in the users shift that, if the user exceeds with idle time, the Idle Time Enquiry screen will display the data in the common RAG Warning colours
  - ♦ *% of Active Hours to Error* The percentage of the hours in the users shift that, if the user exceeds with idle time, the Idle Time Enquiry screen will display the data in the common RAG Error colours
- **Multi-lingual Settings**
  - ♦ *Client-specific ML Labels* Enter a client code to define client-specific multi-lingual labels.
  - ♦ *Default Text* Default the MLdata for the language at first use.
  - ♦ *Italicise Untranslated Text* If no translation has been provided, italicise text in the screen.
- **User Idle RAG Settings**
  - ♦ *Minutes to Warning* The number of minutes since the last task before the user is highlighted as a warning
  - ♦ *Minutes to Error* The number of minutes since the last task before the user is highlighted as an error

27 Run

This screen allows you to modify and create Runs for the Dashboard Timed Display.

To create a new run, click **Add**. You will be shown a form to add a new run.

When you have added the form, click **Save** under the Add form.

To change the values of a run, change the text in the fields on the screen then click **Save**.

To change or select the screens that are displayed in a run, select the run you wish to edit using the radio button on the right of the run and click **Edit Screens**. You will be taken to the *Edit Screens* form.

To delete a run, select the run you wish to delete using the radio button on the right of the run and click **Delete**.

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28 Settings

Setting can be broken into several categories:

- Web
- Productivity
- Run
- User
- Extended Productivity
- Shift Maintenance

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29 Shift Maintenance

The Shift Maintenance screen allows you to maintain the on and off times of each individual shift. You can also add and remove breaks to and from the Shift.

This information is used to compare against the actual active time of an employee, so a percentage active can be calculated and displayed in the Shift Idle Time Enquiry.

Shifts are created for you from the incoming data from the host systems, if they support shifts.

Shifts can be found by clicking on the shift name in the drop-down list. The screen will display the details of the shift.

You can change the shift name and enter the shift start and end times here.

You can add Breaks by clicking on the **+** button.

You can then enter the break start and end times in the fields provided.

You can remove a shift by clicking on the appropriate **-** button.

If you want to create a new Shift, select *New* from the drop-down list. You will then be able to enter the name,start and end times and breaks as when editing an existing Shift.

Once you have made all your changes, you can save by clicking the **Save** button.

You can see the users assigned to each shift by clicking on the **Assign User** button.

- To move all Available Employees to a Shift, click the double right arrow.
- To allocate an Employee to a Shift, select it from the Available employees on the left list and click the single right arrow.

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- To remove an Employee from a Shift, select it from the Selected employees on the right list and click the single left arrow.
- To remove all Selected Employees from a Shift, click the double left arrow.

You can search for specific employees to add or remove by using the appropriate filter box to enter all or part of the employee name. All matching employees will be moved to the top of the list.

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30 Single Screens

Single Screens show a single element, usually tailored for a specific purpose. These screens are normally also available in multi-screen forms as well.

Name	Description
WCS	
Best and Lowest - Part Picks	Pickers who have achieved greater than target and less than minimum productivity figures
Current Part Pick Productivity	A screen to show the current part pickers in the system, comparing the productivity of the pickers against the minimum and target productivity figures.
Current Putaway Productivity	A screen to show the current putaway operatives in the system, comparing the productivity of the putaway operatives against the minimum and target productivity figures.
Current Receipt Productivity	A screen to show the current receivers in the system, comparing the productivity of the receivers against the minimum and target productivity figures.
Current Replen Productivity	A screen to show the current replen operatives in the system, comparing the productivity of the replen operatives against the minimum and target productivity figures.
Daily Part Pick Productivity	A screen to show the current part pickers in the system, comparing the productivity of the pickers against the minimum and target productivity figures.
Daily Putaway Productivity	A screen to show the current putaway operatives in the system, comparing the productivity of the putaway operatives against the minimum and target productivity figures.
Daily Receipt Productivity	A screen to show the current receivers in the system, comparing the productivity of the receivers against the minimum and target productivity figures.
Daily Replen Productivity	A screen to show the current replen operatives in the system, comparing the productivity of the replen operatives against the minimum and target productivity figures.
Highest Decon	Highest 10 Deconsolidation Operatives
Highest Full-pallet Pick	Highest 10 Full-pallet Pickers
Highest Putaway	Highest 10 Putaway Drivers
Highest Receivers	Highest 10 Receivers
Highest Replen	Highest 10 Replen Drivers
Housekeeping Moves	Highest 10 Housekeeping Move Drivers
Lowest Decon	Lowest 10 Deconsolidation Operatives
Lowest Full-pallet Pick	Lowest 10 Full-pallet Pickers
Lowest Putaway	Lowest 10 Putaway Drivers
Lowest Receivers	Lowest 10 Receivers
Lowest Replen	Lowest 10 Replen Drivers
Moves Over Target	Housekeeping Move drivers who have achieved greater than target figures
Moves Under Min	Housekeeping Move drivers who have not achieved the minimum productivity figures
Orders	The outstanding orders and picks, showing the total number of tasks and cases
Over-Productive Pickers	Pickers who have achieved case productivity figures in excess of the targets
Pick Productivity (Units)	The Highest 10 pickers, by Productivity (Cases per Hour)
Pick Volume Completed	The Highest 10 pickers, by number of pick tasks completed
Picker Productivity (Tasks)	Highest 10 Pickers, organised by Productivity in Tasks/Hour

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Putaways Over Target	Putaway drivers who have achieved greater than target figures
Putaways Under Min	Putaway drivers who have not achieved the minimum productivity figures
Receipts Over Target	Receipt operatives who have achieved greater than target figures
Receipts Under Min	Receipt operatives who have not achieved the minimum productivity figures
Receiving	10 Highest and Lowest Receivers
Replens Over Target	Replen Drivers who have achieved greater than target figures
Replens Under Min	Replen Drivers who have not achieved the minimum productivity figures
Under-Productive Pickers	Pickers who have achieved productivity figures below the minimum level.
Units Picked	The Highest 10 pickers, by number of cases picked
WMS	
Adjustments by Tasks	All the adjustment operatives in the warehouse, with those completing the most tasks at the top of the list.
Despatches by Tasks	All the despatch operatives in the warehouse, with those completing the most tasks at the top of the list.
EDI Heartbeat	A screen to visually show the EDI processes of the user's default settings and whether they have been active in the last 24 hours. Click a blip to see how many items were processed in that hour.
EDIs Processed	A screen to show the number of EDI messages processed per EDI type in the warehouse.
Moves by Tasks	All the move operatives in the warehouse, with those completing the most tasks at the top of the list.
Pack Productivity	All the pack operatives in the warehouse, with those with the best pack productivity at the top of the list (orders/hour).
Pickers by Tasks	All the pick operatives in the warehouse, with those completing the most tasks at the top of the list.
Putaways by Tasks	All the putaway operatives in the warehouse, with those completing the most tasks at the top of the list.
Receivers by Tasks	All the receipt operatives in the warehouse, with those completing the most tasks at the top of the list.
Return Productivity	All the returns operatives in the warehouse, with those completing the most tasks at the top of the list.
Stock Take by Tasks	All the stock take operatives in the warehouse, with those completing the most tasks at the top of the list.

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31 Summary Screens

Summary Screens show combined views of information designed to give an overview of particular areas quickly and visibly. Screens can be:

- System-related, showing current system tasks:

- Employee-Productivity-related, showing productivity in different areas:

- Summary screens of productivity information

Name	Description
WCS	
Current Productivity	A screen to compare operative productivity against the minimum and target figures. The screen shows Receipt, Part Pick, Putaway and Replen.
Deconsolidation	Highest and Lowest 10 Deconsolidation Operatives.
Pallet Pick	Highest and Lowest Full-pallet pickers
Picker Details	The outstanding orders and picks, plus a list of the most productive pickers
Picker Productivity	

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	The Highest productive pickers (by cases, tasks and Case Productivity figures, plus a screen to identify those pickers who are performing greater than the target productivity figure.
Putaway	Highest and Lowest 10 putaway drivers
Replen	The Highest and Lowest 10 replen drivers.
Shift Summary	A summary of the productivity/tasks completed of all the shifts in all the task types.
System and Warehouse Overview	A split screen, showing the current tasks in the warehouse, plus a list of all the tasks completed in the warehouse so far, with productivity figures
System Overview	Summary of the current tasks in the system, showing the total quantiies of stock for all areas of the system
System Productivity 1	The Highest 10 operatives in Receipt, Putaway, Replen and Pallet Moves
System Productivity 2	The operatives who maintain a productivity better than the target for Receipts, Putaways, Moves and Replens
Task Productivity	A screen to compare operative productivity against the minimum and target figures. The screen shows Receipt, Part Pick, Putaway and Replen.
Users	Number of users connected to the system
Warehouse Summary	A summary of the productivity on all the tasks completed in the warehouse
Warehouse Weekly Summary	A summary of the productivity figures achieved and number of tasks completed for the last 7 days, by task type, for the warehouse
WMS	
Shift Summary	A summary of the tasks completed for all the shifts in all the task types.
System Productivity 1	The highest 10 operatives in Receipt, Return, Pick and Adjustment.
System Productivity 2	The highest 10 operatives in Despatch, Move, Stock Take and Pack.
Warehouse Summary	A summary of all the tasks completed in the warehouse today.
Warehouse Weekly Summary	A summary of the tasks completed for the last 7 days, by task type, for the warehouse.

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32 System Guide

The **CALIDUS** Vision system combines several components:

- Dashboard - Simple queries and tabular summaries, designed to be used within a Warehouse to help improve productivity.
- Analytics - Queries, Graphs, Enquiries and summary screens providing a deeper analysis of the current warehouse operation. This component includes all the functionality of the Dashboard, plus additional 'deep dive' analysis and historical enquiries.
- Monitor - screens designed to allow users to gain visibility of potential errors within the systems monitored by Vision, within a reasonable timescale.

Additionally, **CALIDUS** Vision is designed to mine data from several systems and display screens associated to them within the user interface. To that end, each user is allocated a group of systems that they can access. Currently those systems are:

- **CALIDUS** Mobile (WCS)
- **CALIDUS** 3PL (WMS 7.70)
- **CALIDUS** 3PL (WMS 4.14)
- **CALIDUS** TMS (MTS)
- Admin Functions

There are plans to expand Vision to cover all **CALIDUS** products - please see the product roadmap for details. Additionally, **CALIDUS** Vision can be expanded to work with external non-OBS systems.

The basic operation of the components are the same.

- Basics
- Log On
- Main Screen (HOME)
- System Select
- Settings
  - ◆ Web
  - ◆ Productivity
  - ◆ Run
    - ◊ Edit Screens
  - ◆ User
  - ◆ Extended Productivity
- Admin
  - ◆ Add User
  - ◆ Event Log
  - ◆ Rules
  - ◆ Releases
  - ◆ Names Maintenance
  - ◆ Menus
- Look and Feel
- Credits
- Printing

32.1 Dashboard

A limited number of pertinent screens are included in the following categories:

- Summary Screens
- Single Screens

Additionally, the Dashboard display is started from:

- Actions

32.2 Analytics

A far greater number of screens are included than in the Dashboard stand-alone product. The queries show analysis of productivity versus targets and minimums, with historical analysis and enquiries included across all categories.

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- Summary Screens
- Single Screens
- Extended Extractions
- Graphs
- Analysis
  - ♦ Enquiries
  - ♦ Predictors
- Monitor

Additionally, the Dashboard display is started from:

- Actions

Note that your menus may have different items, as they can be modified by the system administrators.

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33 System Select

Calidus Vision is designed to mine data from multiple systems and display screens associated to them within the user interface. Currently those systems are:

- Calidus 3PL-Mobile (WCS)
- Calidus 3PL (WMS 7.70)

There are plans to expand Vision to cover all Calidus products - please see the product roadmap for details. Additionally, Calidus Vision can be expanded to work with external non-OBS systems.

In order to allow the user to see the data and screens associated to each system, each user is allocated a group of systems that they can access when they are set up.

When the user logs on, all available screens from all available systems are displayed, as well as those that are system-independent. Each system-specific screen name on the menu is preceded by the system code **((System) Screen Name)** when multiple systems are being displayed.
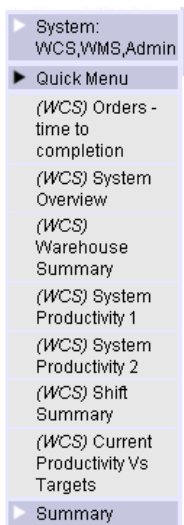
The user can choose to view a single system by using the "System" button on the menu.

The button displays the current systems being displayed in the menus.

When the button is clicked, the user can select the system required from the menu.
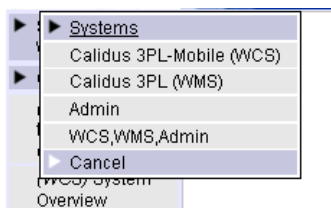
When selected, the menu will automatically reload with the new menu options relating to the chosen system.

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34 System Users

This screen allows a list of all users of the CALIDUS Vision system to be displayed. You can Edit existing users, Add new ones and Delete users from this screen.

ID	Name	Level	Systems	Menu	
MTS	MTS User	9	MTS	DEFAULT	Delete Edit

When started, the screen displays a list of all users.

To delete a user, click the **Delete** button associated to that user. You will be prompted to confirm that you want to delete this user. If you confirm (through the **OK** button), the user will be deleted and the list redisplayed.

To add a user, click the **Add** button. A pop-up will be shown to enter the details.

User	
User Name	
Password	
Company	
Warehouse	
Owner	
Security Level	7
Group Code	WCS

- Enter the **User** ID - this will be converted to lower case.
- Enter the **User Name**
- Enter the **Password** - this is case-sensitive.
- Enter the default **Company** Code
- Enter the default **Warehouse** ID
- Enter the default **Owner** Code, if the user is to be restricted to viewing only this owner's data. If the user is to see all the data for all the owners, leave this blank. You can select the owners from the drop-down list provided.
- Enter the user's '**Security Level'**. This defines which screens can be seen - any screens of a security level less than or equal to the user's security level may be viewed. For supervisors, enter 8, for normal users 7 or less. For Admin users, enter 9.
- Enter the '**Group Code'** - this defines which systems may be seen. Currently this is:
    - WCS - Calidus *3pl*-Mobile
    - WMS - Calidus *3pl*
    - ADM - Calidus Vision Administration Functions
    - ALL - All Available Systems

Multiple systems may be defined by delimiting them with a comma, e.g. `WCS,WMS`. Specifying `ALL` allows the user access to all available systems.

You can hide the pop-up again by clicking the **Hide** button.

To edit an existing user, click the **Edit** button associated to that user. A pop-up will be shown to edit the existing user details. This is the same as the Add User pop-up, but will be pre-populated with the details of the user you selected. You will not be able to amend the User ID or Password.

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35 User

User Settings

User Name	Tony Walker
Company	OBS
Warehouse	OBS
Owner	
Menu Group	TEST

Save   Reset
Quick Menu Screens   Reload App with New Settings
Change Password

This screen allows you to set the default Company, Warehouse and Owner for the user. To do this, enter the required values in the fields provided, then press **Save**. If no values are entered, all data is viewable by the user. If values are entered, all views change to display only the data for that company, warehouse or owner.

This screen can also be used change the default Menu Group assigned to a user, which controls what items they have available on their menus.

The user can maintain their password from this screen by using the **Change Password** button.

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36 User Predictors

The Predictor can be used to predict the following items:

- The Estimated Time to Completion of the tasks selected, using the resources available.
- Number of Users required to complete a given set of tasks in a given timescale
- Productivity Rate required to complete a given set of tasks within a specific timescale at the specified rate.
- Amount of Tasks that can be completed of that type with those resources within the timescale.

To create a new Predictor, select 'New' from the drop-down Predictor box and enter the name and description in the fields provided. Click *Save* to save the new Predictor. The screen will then allow you to enter the Parameters. Note that you can copy an existing Predictor's parameters here by choosing the Predictor from the provided drop-down box.

To find an existing Predictor, select the Predictor from the drop-down Predictor box - the screen will immediately display the result of the Predictor.

You can delete a Predictor once found using the **Delete** button.

You can save changes to the name and description by clicking the **Save Titles** button. If you do not want the changes you have made to the titles, click the **Reset Titles** button.

Click on each of the steps to create or amend the values of the Predictor.

36.1 Step 1: Predict What?

First the system must be informed of what it to be predicted - choose it from the drop-down list and click **Next** when complete.

Depending on the item to be predicted, the screen will modify the stages following.

36.2 Step 2: Owner

The Predictor needs to know which owner you are predicting for - choose the Owner from the drop-down list provided. Only Owners your user is set up to see can be chosen here. Click **Next** when complete.

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36.3 Step 3: Tasks

The Predictor need to know what task type is being predicted. Several Task types may be selected:

- *Generic* - generic task types (for example, Part Picking, Putaway, Replen).
- *Extended* - if your system has been configured with generic tasks split down into sub-types, this option will be available here, with a list of all the sub-types.
- *Orders* - the available orders in the system. If selected, a list of the available customer groups for the orders will be displayed for selection.

Click **Next** when complete.

36.4 Step 4: Amount

The Predictor needs to know the amount of tasks that are to be completed in this model. Drop-down lists will be shown to allow selection, depending on the task type.

For *Generic* and *Extended* tasks, a drop-down list allows you to choose from the current outstanding tasks of that type, or you can manually enter a number of tasks to be completed in the box provided.

For *Orders*, a drop-down list will show allowing selection of:

- *Allocated (Today)* - all allocated lines for all orders for today only
- *Allocated (All)* - all allocated tasks for all orders
- *Ordered (Today)* - all ordered lines for all orders for today only
- *Ordered (All)* - all ordered lines for all orders

Click **Next** when the information has been chosen.

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36.5 Step 5: Users

You are next asked to identify the Users you are using for the calculation. You can choose the current users logged in to this task type or you can enter a number of users. Once this information has been entered, click **Next** to continue.

36.6 Step 6: Time

You will be asked to identify the amount of time required to complete the tasks in this stage. You can enter this as an Elapsed number of hours and minutes, an actual time or specify a Limit break.

Limit breaks are set in the Rules to define the time that logical breaks occur in the operation (for example Shift breaks). Up to 3 of these may be entered. The system will check for the next Limit break after the current time and use that to determine how much time is remaining before we get to that time.

Click **Next** when the time has been entered.

36.7 Step 7: Results

Once all information has been identified (or an existing Predictor is chosen to be displayed), the screen will display the results of the Predictor. For example, here this is predicting the amount of time required to complete the current part-pick tasks outstanding at the current owner rate, with the current logged-on Part Pickers.

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36.8 Editing

Each step of a saved predictor can be modified by clicking on the Steps menu on the left of the form. When modifying the steps the **Next** button will be changed to a **Save and Go** button, which will automatically save your changes and take you back to the Results step and display the results of your changes. Note that this will not save changes to the titles.

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37 Users - Details

This screen shows a detailed breakdown of what activity each connected WCS user is currently performing.

🔴 **Warning**: This is only available if your WCS supports the interfacing of User Activities.

💡 **Note:** Users not currently engaged in a task will be marked as 'Idle' and will be coloured red.

The last task information and amount of time since the last task completed is shown. Hovering over the last task will show details of that task in a popup, if further details are available.

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38 Users Logon Details

This screen shows the detail of when a each WCS user connected or disconnected from the host system. ⚠ **Warning**:
This is only available if your WCS supports the interfacing of User Logon/Logoff details.

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39 Warehouse Utilisation

The Warehouse Utilisation screens show the percentage utilisation of Areas and Aisles within the warehouse.

39.1 Area Utilisation

The screen displays all the areas with your default warehouse, along with summarised percentage utilisation information per location use type. The data is RAG-coloured.

Clicking on an area will display the Warehouse Aisles Utilisation screen, with the area chosen pre-selected.

39.2 Aisles Utilisation

The screen allows you to choose an Area to display. If the screen has been called from the Areas screen, this will be pre-selected for you.

Type in text in the drop-down lists to search for the entry - the list will filter.

The screen displays the detailed information of each aisle and use type within the area, along with percentage utilisation figures. This percentage utilisation is RAG-coloured.

The results can be sorted using the column headings, and all the results can be searched using the provided Search text box.

A bar chart of this information can also be shown from the menu. **Note:** Only aisles with percentage utilisation values (i.e. not N/A) will be displayed in the chart.

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Warehouse Aisles Utilisation

Area: 01 ▼ Go

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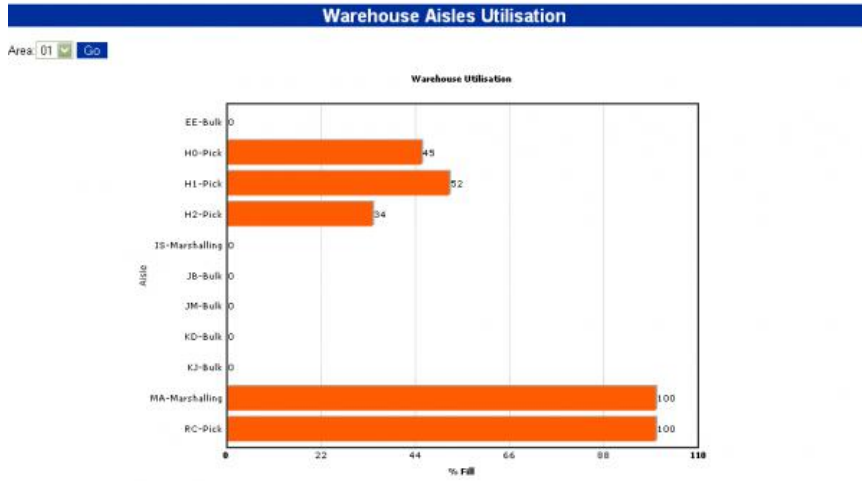
40 WCS Alerts

This screen shows a list of all recent (i.e. since last data mine) exceptions from your WCS. ⚠ **Warning**: This is only available if your WCS supports the interface of exceptions.

Date/Time	Who	Activity	Description
12/12/2009 09:00:00	RXDI - RXDI	Short Pick	Picking

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41 Web

The title of the application can be amended to suit your needs by amending the value in **Title on Header**. Simple HTML span tags can be used to affect the text, such as the Italic tag seen in the example screen.

The overall look and feel of the application can be chosen from the values in the **Style** drop-down list.

The size of the form and relative size of the font can be adjusted to best suit your display using the **Size of Font** and **Size of Display Frame** drop-down lists. The relative size of the entire display can be adjusted using CTRL-+ and CTRL-- in your browser.

The delay between screen changes in the Dashboard Times Display can be set by choosing the value from the **Time until new screen displayed** drop-down list.

The screen display can be maximised in the Dashboard Timed Display view by choosing ?No? from the **Show menu and logo in timed display** drop-down list.

The type of menu can also be controlled here:

- *Show/Hide menu with Pin* - by default the menu shows when you hover the cursor over it, and hides when you move away. A pin in provided to pin the menu open - by
- *Always show menu* - by default the menu is always open. You can switch to Show/Hide by clicking the pin icon provided.
- *Hamburger Menu* - click the icon to open and close the menu.

When you have set the values you want, click **Save**. To update the application with your new settings, click **Reload App with New Settings**.