

E2 Mobile Dashboard

Congratulations on your purchase of the E2 Mobile Dashboard. Now you will be able to access executive level information stored in the E2 Shop System right from your Tablet, Smart Phone, or other remote computers. Similar to Quick View's Executive Overview, you can now see how your company is doing from your profitability by customer, performance analysis of employees, on-time deliveries, quoting won/loss percentages, backlog by dollars to a complete accounting snapshot literally at your fingertips.

Overview

Welcome to Mobile Dashboard linking you directly to Executive Overview no matter where you are. You must be running V7.2.13 or higher of the E2 Shop System to set up this functionality. Once your selected users have been granted access, they can log in to the Dashboard on their Tablet or Smart Phone or even a remote PC. Their individual security settings in E2 will be used when they log in to the Dashboard. This latest application can be used on virtually any Android device as well as iPhones and iPads. Users are not limited to Internet Explorer (on a remote PC) and are free to use any of the popular browsers including Chrome (Android), Safari (Mac), Firefox, Opera, and Dolphin. There are two versions of Opera for Android devices. Opera Mini is not recommended as it does not perform well for Hot Spots. Opera Mobile is the preferred alternate version for Android devices.

Mobile Dashboard Server Prerequisites

All of these items must be in place prior to installing the E2 Mobile Dashboard.

- Microsoft .NET Framework 4.0
- Windows 2003 or 2003 R2 Server, Server 2008 or 2008 R2, or SBS 2011 (any edition)
- IIS 6.0 or IIS 7.0 must be installed including the ASP.NET and Management Console options
- Your E2 Shop System (E2SS) database must reside on a SQL Server
- The Mobile Dashboard server must be able to access E2SS folder and the SQL Server where your E2SS data resides.
- To access Mobile Dashboard from the Internet, you must have a static, public IP address for your network. Please use a Network Consultant who knows how to configure the web server access properly and securely.
- A local or domain user that has Read/Write access to the folder where E2SS is installed and the "C:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\Temporary ASP.NET Files" folder on the server hosting the Mobile Dashboard. It is recommended that you set the options for this user so that the password will not expire.

If you are unsure that your server meets any of the above requirements please contact your Network Administrator or the IT professional responsible for supporting your computer equipment.

***NOTE: Once the installation and configuration of the Mobile Dashboard is complete you will be able to access the site from a variety of devices. Shoptech recommends devices with larger displays like desktop or laptop computers and tablets. While it is accessible from smart phones, you may find the pocket size displays to be less convenient.*

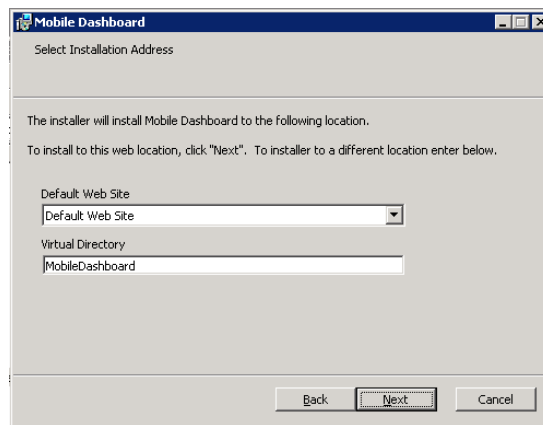
Installing Mobile Dashboard

To begin, you will need to download the installation file from the following link:

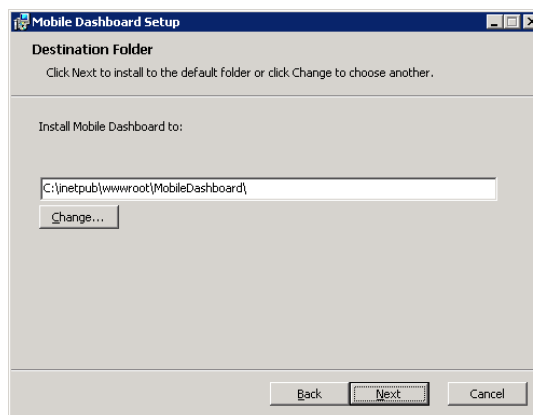
<http://client.shoptech.com/files/MobileDashboard.zip>

Save this file to a folder on the server from which you will host the Mobile Dashboard. Extract the contents into the same location. Double click on the MobileDashboardInstall.msi file.

1. On the Welcome window, click **Next**.
2. Accept the terms of the license agreement by checking the “**I accept...**” checkbox, then click **Next**.
3. If you host your company’s website from this server, you can choose to install the Mobile Dashboard as a Virtual Directory under your website. Set your company’s website as the Default Web Site by selecting it from the drop down menu. If your company website is hosted offsite then you will want keep “**Default Web Site**” in this field. You can accept the default value for the Virtual Directory or change it to something that will be easier for the user to type; i.e. Dashboard, Mobile, or MD. Just ensure that what you type here does not have spaces. Click **Next**.



4. Set the folder where you would like to have the Mobile Dashboard files installed. In most cases, selecting the default location is suggested. Click **Next**.

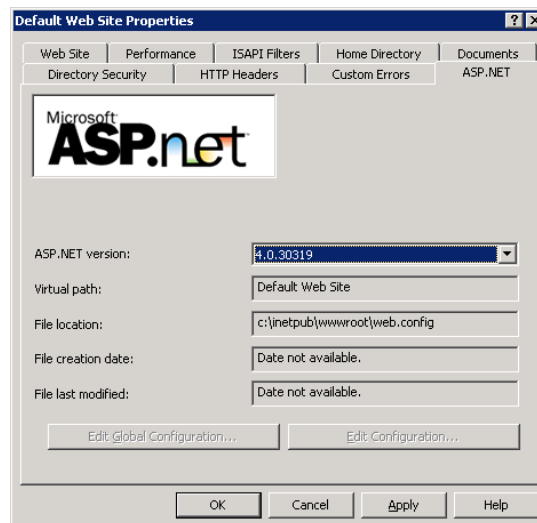


5. Click **Install**.
6. When complete, click **Finish**.

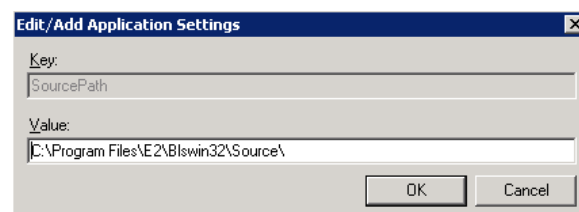
Configuring the Mobile Dashboard in IIS

Microsoft Server 2003

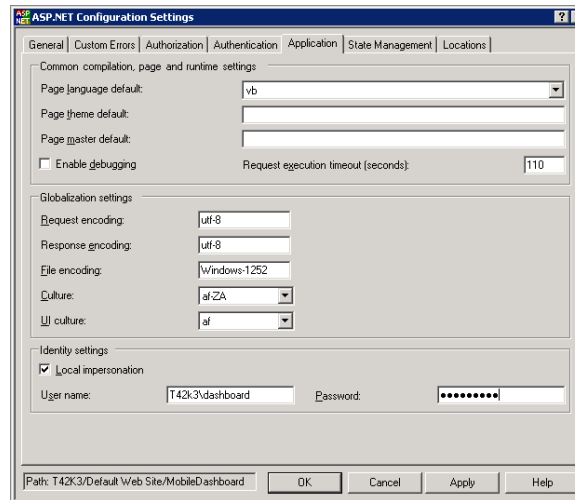
1. Open the **IIS Manager**.
2. In the explorer pane, expand your server.
3. Expand the **Web Sites** folder.
4. Right click on **Default Web Site** and select **Properties** from the resulting menu. If you installed the Mobile Dashboard under your company's web site, right click it and select **Properties** from the resulting menu.
5. On the **ASP.NET** tab, make sure the ASP.NET version is set to 4.x. If necessary, change it and then click **Apply**.



6. Answer **Yes** to the prompt about restarting the W3SVC service. It is recommended that you reboot the server at this point to make sure that the change you just made is in fact saved.
7. Once the server is restarted, log back in and open the **IIS Manager** again.
8. Expand the Default Web Site or your company's Web Site folder. Right click on the **Mobile Dashboard** Virtual Directory and then select **Properties**.
9. Click on the **ASP.NET** tab and then click the **Edit Configuration...** button.
10. On the General tab in the Application settings pane, highlight **SourcePath** and then click the **Edit** button.
11. Enter the path to the location where you have your E2SS program installed; specifically to the Source folder. Click **OK**. This path could be to a different server/computer on your network.



12. On the **Application** tab, check the **Local impersonation** checkbox. You will need to set the User name and Password as the one that you were instructed to create in the Prerequisites section above. Click **Apply**.



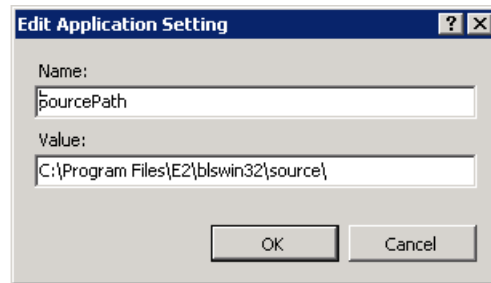
13. Click **OK** and then click **OK** again to close the Mobile Dashboard Properties window.
14. Close the IIS Manager.
15. Open your Internet browser and type “<localhost or company web site>/<your virtual directory name>” and press **Enter** to verify that the Mobile Dashboard is accessible. Now you’re ready to get started.



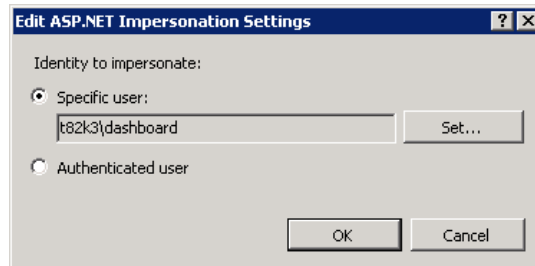
Microsoft Server 2008

1. Open the **IIS Manager**.
2. In the Connections pane, expand your server.
3. Expand the **Sites** folder.
4. Expand the Default Web Site or your company’s Web Site. Click on the Mobile Dashboard Virtual Directory.
5. In the ASP.NET area of the Features View tab, double click on the **Application Settings** icon.

6. Double click on the **SourcePath** and enter the path to the location where you have your E2SS program installed; specifically to the Source folder. Click **OK**. This path could be to a different server/computer on your network.



7. Click on the Mobile Dashboard Virtual Directory again to return to home page of the Features View. Double click on the **Authentication** icon.
8. The ASP.NET Impersonation row may have the Status of Disabled, select this row. In the Actions pane, click **Enable**. If it is already enabled, then skip to the next step.
9. Now in the Action pane, click **Edit**.
10. Click the **Set** button. You will need to set the User name and Password as the one that you were instructed to create in the Prerequisites section. Click **OK**.



11. Close the IIS Manager.
12. Open your Internet browser and type “<localhost or company web site>/<your virtual directory name>” and press **Enter** to verify that the Mobile Dashboard is accessible. Now you’re ready to get started.



Administrative Guide

Access to Dashboard Seats

To gain access to the **Dashboard**, users must first obtain unlocks for the number of seats purchased. Once these codes have been enabled, your System Administrator can grant access to that number of users in the E2 Shop System. In **File | System Maintenance | User Maintenance**, edit a **User** and click on the **Misc Settings** tab. Click the checkbox next to **Allow User to Have Mobile Access**. Once access has been granted, this user can now log in to their Mobile Dashboard.

Security in Mobile Dashboard

This new mobile app gives you access to quick financials in the Overview section, Backlog Analysis, Profitability information, Performance analyses, Quoting, Shipments, Receiving, Attendance, Sales analysis, Customer and Vendor Returns along with Non-Conformances, a Shop View showing each employee clocked in and the jobs they are working, and finally any Hot Spots the user has assigned. Your security access within the E2 Shop System determines which options you'll be able to retrieve from the Dashboard menu.

The **Overview** option provides **Accounts Receivable** numbers when **Cash Receipts** are allowed by the user. **Accounts Payable** and **Cash Accounts** information is allowed when users have access to **Check Writing**.

Results for the **Backlog** rely on access to the **Backlog Summary**.

Profitability requires access to the **Hourly Rate Summary**.

Performance analysis is linked to access to the **Time Tracking Summary**.

Quoting only needs access to the **Quotation Summary**.

Shipments rely on access to the **Shipment Summary**.

Receiving is linked to **Receiving Summary** access.

Attendance analysis requires access to the **Attendance Summary**.

Sales analysis relies on access to **AR Billing**.

Customer Returns, **Vendor Returns**, and **Non-Conformances** are always available to any user.

Shop View is always available to any user and displays each employee clocked in and jobs they are working, if any.

Hot Spots load according to the access in E2 for the user logged in.

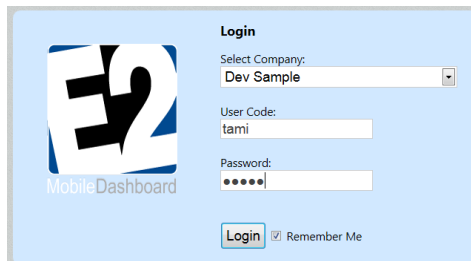
Browser Findings

Browser options abound on PCs as well as SmartPhones and Tablets. We tested the most frequently used across several devices. From a PC, we tested the Dashboard on Internet Explorer V8, Internet Explorer V9, and all the current versions of Firefox, Chrome, and Opera. They all performed equally well. On Android Phones and Tablets, we used the current default Android browser (Chrome) as well as Firefox, Dolphin, and Opera. Firefox performed the best. Opera performed second best and the default Android browser and Dolphin are the least consistent with performance. We used Safari only for the iPhone and iPad and that browser works consistently. Users should find what works best for them on their chosen device and this is largely a personal preference. Some browsers handle chart generation and layout better than others; the Android browser is least effective. Some browsers require a trigger to activate a refining Search while others just begin reconfiguring data as you type; Firefox requires a press of the Enter key.

Mobile Dashboard Users

Logging In

With your server and database set up, you can select your company, enter the same **User Code** and **Password** used to access the E2 Shop System, and click/tap the **Login** button. Use the **Remember Me** checkbox and you can return to this screen and only have to input your **Password** on future visits.



Using the Dashboard

Now that you've logged in to **Mobile Dashboard**, the **Overview** menu (AR, AP, and Cash Account balances) displays automatically, if you have access to **Cash Receipts** and **Check Writing**. The **Shop View** as well as the **Hot Spots** option will also build automatically after you select them. The **Shop View** displays employees presently clocked in and if they are working a job, that information will also display. Each **Hot Spot** the logged in user can access displays and the **Run Hot Spot** action can be clicked or tapped to retrieve the details.

Displaying Results

To get results for an area, click/tap the appropriate navigator button. Then simply set the filter options and click/tap either of the binocular icons to return your results. If you change your mind and would like to switch to another menu option, you can simply click or tap the other option, set the filters and use the binocular icon again.

Results for the **Detail** grid will sort alphabetically so any UNKNOWN entries that traditionally displayed first while looking in **QuickView** will display here in their alphabetical position. You may also notice that **Group By** options are not in the same order. **Part Numbers**, **Customer Names** and **Vendor Names** will display in **Dashboard** as **Description**. There is no **Print** option on the **Dashboard** as this is meant for mobile usage.

Date Range and Group By Selections

The **Date Range** and **Group By** filters are standard on each option except for **Backlog**, it only needs a **Group By** filter. **Date Range** options in the **Dashboard** are slightly different than **QuickView** and the default is **Last 30 Days** instead of **L12MOS**. The **Dashboard** will not have any options for "future" information so **NWEEK** (Next Week) has been removed. Due to a 15 minute request timeout on the **Dashboard**, the **ALL** date range has been removed.

QuickView:

ALL
L12MOS (Default Display)
LWEEK
LYMTD
LYYTD
MTD
NWEEK
YTD

Mobile Dashboard:

Current Fiscal Year
Last Fiscal Year
Last 12 Months
Last Week
Last Year Month To Date
Last Year Year to Date
This Year Month To Date
This Year Year to Date
Last 30 Days (Default Display)
Last 90 Days

Some of the longer date range options may still encounter this request timeout. This is dependent on how much data the query must calculate and a shorter date range will produce faster data retrieval. Two companies could have the same size database, but Company A might have 30 employees and Company B only 10 employees. Attendance Analysis will run more quickly for Company B. Company A could have simple 3 step routers while Company B has 30 step routers. Performance and Profitability Analyses will run more quickly for Company A.

Refining Details Data

With your data displaying in Detail mode according to the date and group, you can reorganize the results by ascending or descending order according to the column you choose to sort and you can refine these results to narrow down the display.

Column Headings on the Detail screen act as toggles to reorder information. The first column drives the initial sort order, but can be changed easily by clicking/tapping an alternate column to look at data from a different viewpoint. So in our example of Sales by Customer for This Year YTD, it is initially sorted alphabetically by Customer Code:

The screenshot shows the E2 Mobile Dashboard interface. At the top, there is a search bar and a date range selector set to "This Year YTD". The group is set to "Customer". The main table displays sales data for six customers, sorted alphabetically by customer code. The sidebar on the right contains a list of navigation options, with "Sales" highlighted in a dark blue button.

Customer	Description	Total Sales	Percent Of Total
ALPHA	Alpha Manufacturing, Inc.	\$46,650.67	37.10%
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
BASS	Bass Tool Company	\$200.00	0.16%
BEAL	Beal Products, Inc.	\$72,863.55	57.95%
CARTER	Carter Corporation	\$56.00	0.04%
COOPER	Cooper Power	\$910.18	0.72%

Showing 1 to 6 of 6 entries

If you prefer to look at this according to Total Sales | Ascending, just click/tap the Total Sales column header!

The screenshot shows the same E2 Mobile Dashboard interface, but the table is now sorted by Total Sales in ascending order. The sidebar navigation options remain the same, with "Sales" highlighted.

Customer	Description	Total Sales	Percent Of Total
CARTER	Carter Corporation	\$56.00	0.04%
BASS	Bass Tool Company	\$200.00	0.16%
COOPER	Cooper Power	\$910.18	0.72%
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
ALPHA	Alpha Manufacturing, Inc.	\$46,650.67	37.10%
BEAL	Beal Products, Inc.	\$72,863.55	57.95%

Showing 1 to 6 of 6 entries

Searching on a Detail screen is progressive and looks at all information across each column so you can pare down results. You do not have to use beginning numbers or letters. The Search function will find all combinations of the Search entry. Browsers have different trigger mechanisms that tell a search to reconfigure itself so you will have to find it for your individual browser and device. For example, it's a tap of the screen on an Android phone if you use the Opera browser or pressing Enter if you use Firefox. On a PC using Internet Explorer, simply typing begins to narrow the results.

Here is the original data retrieved by the filters.

Search:

Customer	Description	Total Sales	Percent Of Total
ALPHA	Alpha Manufacturing, Inc.	\$46,650.67	37.10%
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
BASS	Bass Tool Company	\$200.00	0.16%
BEAL	Beal Products, Inc.	\$72,863.55	57.95%
CARTER	Carter Corporation	\$56.00	0.04%
COOPER	Cooper Power	\$910.18	0.72%

Typing "04" in the Search, returns two entries where the combination of "04" is represented.

Search: 04

Customer	Description	Total Sales	Percent Of Total
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
CARTER	Carter Corporation	\$56.00	0.04%

You can even use spaces in your search to locate your exact results. Watch how it pares down as you type more letters!

Search:

Customer	Description	Total Sales	Percent Of Total
ALPHA	Alpha Manufacturing, Inc.	\$46,650.67	37.10%
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
BASS	Bass Tool Company	\$200.00	0.16%
BEAL	Beal Products, Inc.	\$72,863.55	57.95%
CARTER	Carter Corporation	\$56.00	0.04%
COOPER	Cooper Power	\$910.18	0.72%

Search: CO

Customer	Description	Total Sales	Percent Of Total
ARROW	Arrow Aviation Co. LLC	\$5,049.34	4.02%
BASS	Bass Tool Company	\$200.00	0.16%
CARTER	Carter Corporation	\$56.00	0.04%
COOPER	Cooper Power	\$910.18	0.72%

Search: CO po

Customer	Description	Total Sales	Percent Of Total
CARTER	Carter Corporation	\$56.00	0.04%
COOPER	Cooper Power	\$910.18	0.72%

Search: CO pow

Customer	Description	Total Sales	Percent Of Total
COOPER	Cooper Power	\$910.18	0.72%

View Chart

This toggle allows you to see your filtered results in a **Details** grid or as a **Chart**. You will have to set your filters for **Details** and the **Chart What** option for **Charts** and use the **Binocular** search icon to rebuild results as you toggle back and forth.

Dashboard charts all run as standard **Bar Graphs** using the **Last 12 Months** for the X axis. The Y axis is dynamic and will change according to the **Chart What** option selected. Only those 12 month “buckets” that return data will display. So if you see missing months, you will know there was no data to return.

If you are using a SmartPhone device, charts do not display on the Default (Android) or Dolphin browsers. If charts are a must, please use Firefox or Opera.

Backlog buckets will only display bars and corresponding values that are high enough to be considered significant in proportion to the other buckets; this is measured in dollars as the Y coordinate and these are dynamic according to the totals for 0 – 30 Days, 31 – 60 Days, 61 – 90 Days, and 90+ Days. So if your 0 – 30 Days backlog is over \$800,000, you might see Y coordinates of 250,000, 500,000, 750,000 and 1,000,000 with a bar for 0 – 30 reaching just over the 750,000 mark. If your 90+ Days backlog is only \$700.00 in comparison, you will likely NOT see any bar in that category because the \$700 is insignificant in the whole scheme of the chart.

Logging Out

Users should always remember to use the logout button at the top of the Mobile Dashboard so the connection to the server is not left open unnecessarily. There is a default session timeout for Mobile Dashboard of 20 minutes after no activity. A prompt will display asking the user to log in again if this timeout is exceeded. This allotment of time is an IIS setting so it can be increased or decreased on your server as you see fit.