# ROLLER MANAGEMENT PLATFORM: USER MANUAL





# **Table of contents**

Welcom	ne	5
Login page		6
	Overview	6
	Registration procedure for new users	6
Home page		
	Overview	8
	General search function	. 9
	Selecting company	. 10
	Selecting language	. 10
	Filtering search results	11
	Selecting asset type	13
	Customize	14
	Sorting columns	14
	Filtering columns	15
	Exporting results	. 16
	Pagination	16
	Live chat	16
	Search results	18
Details	page	19
	Info & Documents	19
	Timeline	24
	Sensor Data	26



Raw Sensor Data	27
Asset admin	28
Tasks and notifications	31
Scanning QR code	32
Admin page	
Locations	34
Employees	37
Preferences	38
Subscriptions	39
Customer center	40
Reception page	42
FAQ page	43
Glossary	43
Profile page	
Support	44

## Welcome

Dear customer,

Congratulations on your purchase! Thank you for using our countroll® roller management platform. The basic functionalities of the platform as well as more advanced functionalities are explained in this guide:

- · Overview of all your rollers and sleeves
- · Searching, filtering, sorting and exporting your overview
- Access to all individual roller and roller cover data:
  - Timeline
  - OR labels
  - Inspection reports
  - Technical data sheets
  - o Technical plan
  - Sensor data
- Use your own roller identification schema
- Edit the core properties and add a roller description
- Create a timeline by adding events
- Upload pictures and other documents to events (drag & drop)
- · Track the location of your rollers
- Manage the countroll® access of users within your company and add new users

You can email us at **info@countroll.com** if you still have questions after reading this guide.



# **Login page**

Browse to https://app.countroll.com to access the login page.

#### Overview



- 1. Request new password via email
- 2. Make entered password visible
- 3. Registration procedure for new users
- 4. Link to the FAQ section on the countroll® website
- 5. Select language
- 6. Open live chat with the countroll® help desk.

## Registration procedure for new users



If a colleague already has a countroll® account, follow the **Inviting new users** procedure.

With regard to manufacturers, invite the customer as described in the **Customer center** section.

If these conditions are not fulfilled, follow this procedure:



- 1. Browse to the countroll® web portal https://app.countroll.com.
- 2. Click Sign up.
- 3. Fill in the following information: name, email, and password (2x).
- 4. Click the check mark of **Privacy Statement, Cookie Policy** and License Agreement.
- 5. Click the **Register** button. It may take a little while to process the submitted form. You will receive an activation email.
- 6. Open the activation email and click on the activation link.
- 7. Log into the web portal with your email and password.



# Home page

## Overview



- 1. Welcoming message
- 2. Home page
- 3. Details page
- 4. Scan QR code
- 5. Tasks and notifications (\*)
- 6. Configuration center
- 7. FAQ page
- 8. Profile page
- 9. Log out
- 10. Customize layout home page
- 11. Export results in table
- 12. Live chat with countroll® help desk
- 13. Pagination
- 14. Search results
- 15. Filter columns
- 16. Sort columns
- 17. Filter search results
- 18. Select language
- 19. Select company

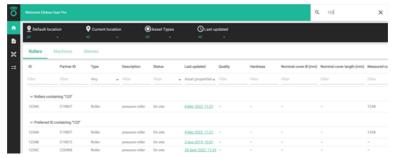
- 20. General search function
- 21. Select asset type
- (\*) The functionality **Tasks and notifications** is not available by default. Contact countroll® if you want to learn more about this functionality.

#### General search function

The general search function allows you to perform a dedicated search for text or values in order to find one or more rollers.

For example, you can search for a number or a description that occurs in one of the columns:

- "driver": shows all rollers containing the description driver.
- "123": shows all rollers for which the dimension corresponds to 123, but possibly also the description.



Concepts that can be searched for are:

- · diameter, length, hardness,
- · roller description, covering type,
- countroll® ID, customer roller ID,
- customer and manufacturer sales order number, delivery number, invoice number.

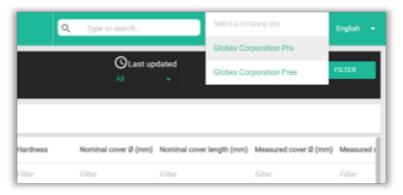
The only constraint is that the search query must consist of at least 3 characters.



## Selecting company

Larger companies are often split up into different entities. Within the countroll® system these are represented as separate companies/sites. This means that each site can manage its own rollers.

To change sites, click on the company name at the top right. You then choose the site you want to work with. You don't need to log out, the page updates automatically.



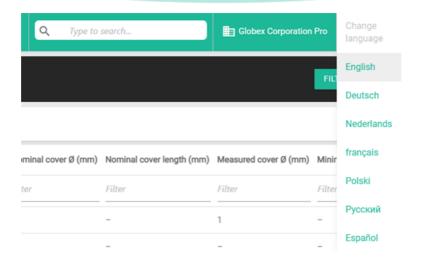
## Selecting language

The language within the countroll® web portal is getting adapted dynamically. Select a language and all terms on the screen will automatically be shown in the selected language.

Currently, the following languages are supported:

- English,
- · German,
- · Dutch,
- · French,
- · Polish,
- Russian,
- · Spanish.

This can be expanded in the future according to the need for other languages.



## Filtering search results

In addition to the general search function, it is also possible to search rollers (or assets in general) based on several predefined parameters:

- **default location**: the machine position where the asset is intended to be operating (e.g. Line 1 in Machine 1)
- current location: the location where the asset is currently physically located (e.g. in stock, at the manufacturer, etc.)
- asset type: Rollers and Sleeves are the default asset types. However, the system is flexible to adapt all assets.
- last updated: the moment when the asset was last changed
- Click on one of the filters and select one or more parameters.
   The filter title will turn **orange**, which means that the selection for that filter has changed but is not yet active.

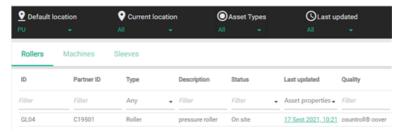




2. Click the **Filter assets** button to apply the filters effectively to the overview.

Once the filter is applied, the filter title will turn **white** again and the search results will be filtered based on the selection made.

In the example below, the rollers are searched that have **PU** as default location.



**These filters are saved when logging out and reconnecting** to the web portal.



If you want to filter on only one parameter, you need to first deselect any other filter(s) still active. Otherwise, the table filters on all selected parameters. Changing one parameter

does not override any other parameters.

## Selecting asset type

The countroll® system has been developed to manage rollers, but in a company, you also have other types of assets. These assets can also be managed in the countroll® platform. Asset type is also one of the predefined filters.

For each customer, the asset types can be activated/deactivated. That's also the reason why separate tabs are available per asset type. This way of working makes its management clearer. Searching, filtering and sorting is done on each of the types separately. If you are looking for a sleeve with ID M14 but you are still on the rollers tab, no results will be found with the general search function. Just click in the sleeve tab to see the results you are looking for.

Each asset type has its own properties. Some asset types are:

- rollers,
- · packaging,
- · mandrels,
- · compounds,
- sleeves.
- · machines,
- · valves,
- · bearing houses,
- · moulds,
- · lifting slings,
- · parts.

For example, a machine has the properties: brand, type, manufacturer, serial number, building year, power, voltage, ...



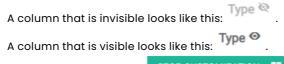
If you have other asset types that do not suit the predefined assets, contact countroll® for more information and configuration.



#### Customize

With the **Customize** button, you can reorder the order of the columns in the table and/or make certain columns visible or invisible.

- l. Click CUSTOMIZE
- 2. A window appears, explaining how to customize the columns.
- 3. Click OK.
- 4. Reorder the columns by dragging the column headers.
- 5. Make columns visible or invisible by clicking on the eye icon .

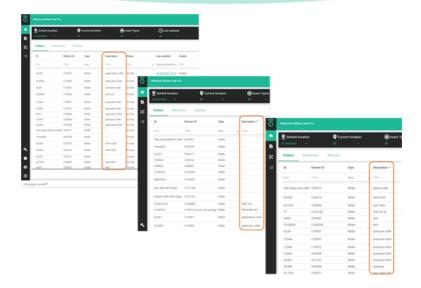


6. When you are done, click STOP CUSTOMIZATION

## Sorting columns

The overview of rollers can be sorted **by clicking on the column title**. In some cases, it can be useful to sort on ID, sometimes on Last updated. **The default sorting order is descending countroll® ID**.

- Click on a column to sort the results in an ascending way.
   Next to the column an arrow up icon is shown.
- Click on the column again to sort the results in a descending way.
  - Next to the column an arrow down icon is shown.
- 3. Click a third time to return to the default sorting.



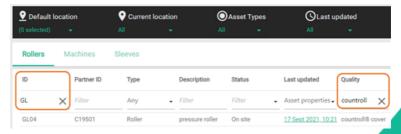
## Filtering columns

The general search results or filters can be refined further by filtering each individual column. Each column has a filter field directly under the column title. This "field" can be an input field where you write text yourself, or a drop-down list. You can filter on multiple columns at the same time.

Column filters are not saved when logging out and reconnecting to the web portal.

#### A few use cases:

 All rollers that have an ID that starts with GL and that have a countroll® cover.





 All rollers that have an ID that starts with GL and that have a measured cover >= 120 mm.



## **Exporting results**

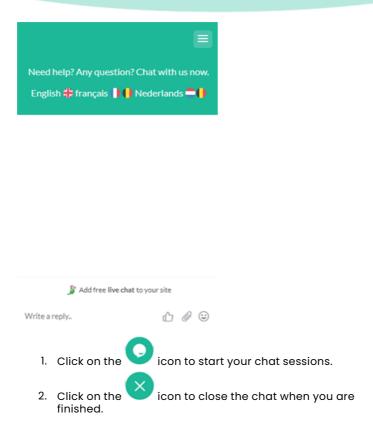
The search results can be exported to Excel or CSV. The applied filters are considered for this.

## Pagination

Use these buttons to define how many search results you would like to see on 1 page. With the navigation buttons you can navigate forward or back through the results.

#### Live chat

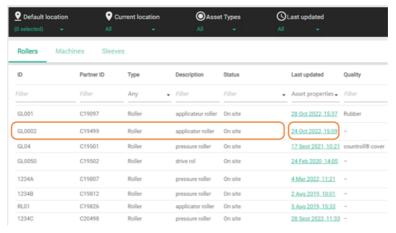
The live chat functionality allows you to chat with someone at countroll® directly. You can also send files through the live chat. Support is available in English, French, and Dutch.





#### Search results

The search results are shown based on the search query and the filters. When clicking on a roller, the details of the roller are shown on the details page. An exception on this is the underlined date of Last updated. When clicking the date, the details page is opened showing the timeline with the last registered event selected.



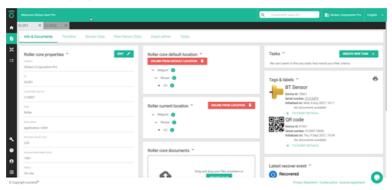
# **Details page**

After finding a roller via the home page, you can consult the details by clicking on the roller. On the details page you can also search for a countroll® ID at the top. The opened rollers are displayed as tabs so you can easily navigate between different rollers.



On the details page of a roller, some tabs are visible at the top, of which the 2 most important ones for the roller management system are:

- Info & Documents
- Timeline



#### Info & Documents

The tab Info & Documents contains info about the core of the roller:

- · measures and properties
- partner roller ID
- location
- documents
- · tags & labels
- · latest recovering or regrinding event
- ...

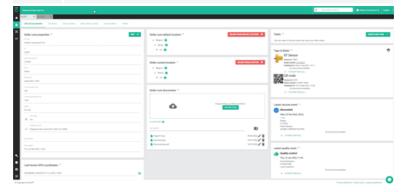


## Roller core properties

Click the **Edit** button to adapt the roller properties. If a roller is not used anymore, it can be removed from the platform by clicking **Delete asset** when editing. You can also deactivate a roller by clicking on **Take permanently out of service**.



Be careful. There is no way to reactivate a roller once deactivated.

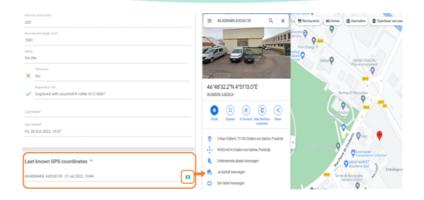


#### Location

The **location** of a roller is tracked in different ways:

- GPS coordinates of the smartphone
- · default location
- · current location

Each time the QR code of a roller is scanned by a smartphone, the GPS coordinates of the smartphone are stored automatically. These coordinates are shown at the bottom left in the Info & Documents tab. Click the control icon to show the location in Google Maps.



The default and current location are shown in the center of the screen. Rollers need to be linked manually to a location by using the smartphone app (scanning the barcode/QR code) or via the web portal. The list of locations is maintained on the **Admin** page.

The difference between the default and current location is as follows:

- **default location**: the machine position where the asset is intended to be operating (e.g. Line 1 in Machine 1).
- **current location**: the location where the asset is currently physically located (e.g. in stock, at the manufacturer, etc.).

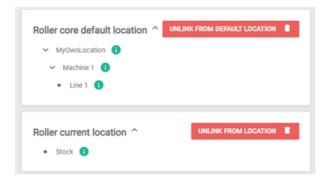
To add a location via the web portal:

- 1. Click Link to location +.
- 2. Choose a location from the list.
- 3. Click Link to location.

#### To unlink a location:

- 1. Click Unlink from location.
- 2. Click Yes, unlink from location.

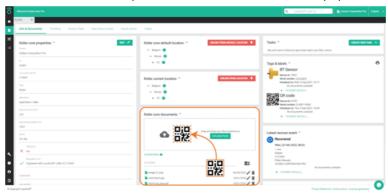




## **Uploading documents**

**Uploading documents** can be done both by the customer and the recoverer. An example of this is the technical plan.

Everyone can also upload documents via drag & drop, or API. A tree structure with folders can also be used for uploading. When you use folder, documents are uploaded to the folder that is currently open.



Tags & labels

**Tags & labels** shows which QR code, NFC tag and/or sensor are linked to the roller, and a link to the coupling event on the timeline.



#### Latest recover event

The latest recover event contains information on the currently applied cover material, the matching documents (if present), and a link to the event on the timeline.



#### Latest quality event

The latest quality event contains some information on the last performed quality check of the cover, the matching documents (if present) and a link to the event on the timeline.



#### Tasks and notifications

Ask your countroll® contact person for more information about the **Tasks and notifications** functionality.



#### **Timeline**

Unlike **Info & Documents**, the **Timeline** keeps track of time related events during the lifetime of the roller.

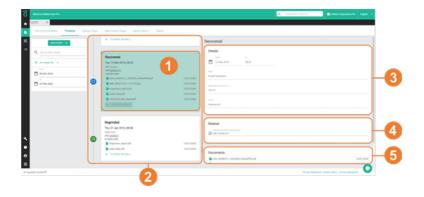
For example, a roller can be mounted or dismounted in a production line. A roller can be recovered one time and regrinded another time. During a quality check, a roller may initially be excellent, but be of lesser quality during a subsequent check.

There are several types of events:

- · mounted,
- · dismounted,
- linked,
- unlinked,
- · recovered,
- · regrinded,
- · mechanically repaired,
- · quality control,
- other.

The timeline (2) is made up of **events**(1) of these types. They are ordered so that the most recent are at the top. Each event also has several properties, related items and documents.

- The **properties** (3) describe the event (who did what when). These properties can be different for each event type.
- **Related items** (4) are often numbers or IDs of documents that refer to the event. Typical related items are purchase orders, delivery numbers, invoice numbers, ...
- In contrast to the documents at Info & Documents, the
  documents (5) of an event are always linked to the event. A
  recoverer will be able to automatically link certain
  documents from his ERP to his recovered event: inspection
  report, technical data sheet, label data, balancing report, ...



#### Adding events

If none of the existing events suit your needs, contact countroll® for more information and configuration of customized events.

Events can be added via the smartphone app as well as via the web portal.

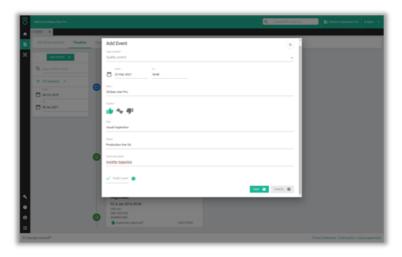
To add events via the web portal:

- Click the Add event + button.
   A pop-up windows appears.
- 2. Select the type of event.
- 3. Enter the properties.
- At the bottom, choose whether to make your event public or not.
  - private: only the owner sees the event on the timeline
  - public: both the owner and the recoverer/manufacturer can see the event on the timeline
- Click Save.



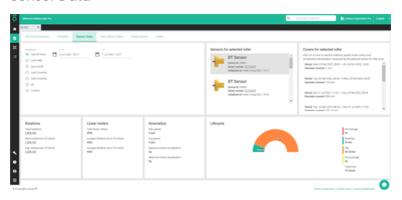
Every event will be owned by the creator. This means that only the creator and the owner of the asset can see the event. By default, no manufacturers will have access to each other's events.





Once an event has been created, documents can be uploaded to the event via drag & drop, or API.

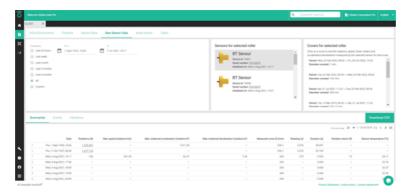
#### Sensor Data



Sensor Data contains an overview of the data our countroll® sensor collects on your rotating equipment and industrial rollers. The sensor measures rotations, speed, acceleration, vibrations or temperature. The data is then transmitted to the countroll® cloud platform and is accessible via API for end-customers to dive deep in the data.

For more information on the countroll® sensor, browse to <a href="https://www.countroll.com/sensorkit?utm\_source=rlrmng-manual">https://www.countroll.com/sensorkit?utm\_source=rlrmng-manual</a> or contact your countroll® contact person directly.

#### Raw Sensor Data

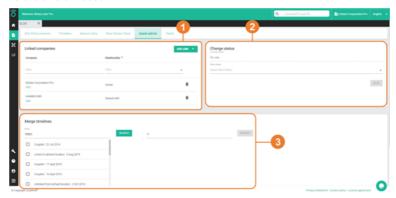


In the **Raw Sensor Data** tab, you can select and download the data collected by the sensor(s) for a certain time frame. After you have selected the data and time frame, click **Download CSV**.



#### Asset admin

**Asset admin** allows you to change certain administrative settings related to an asset.



Asset admin is divided into three parts:

- 1. Linked companies
- 2. Change status
- 3. Merge timelines



A good practice is when the end customer is the **OWNER** and every supplier has **SHARED\_WITH** access. This hides data coming from different suppliers from each other. An asset can be owned by multiple parties, e.g. roller brokers that share ownership with the end-customer, or machine manufacturers that share ownership with the end-customer who has bought the machine.

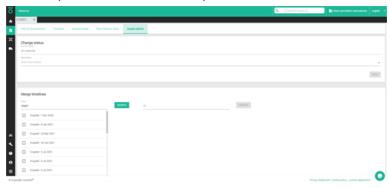
#### Linked companies

**Linked companies** contains all the companies or accounts that have access to the asset. This list contains the owner of the roller, but might also include the recoverer(s) and/or manufucturer of the roller.

There are two types of relationships a company can have:

- Owner
- Shared with

The "Owner" companies can add other companies to the asset, while "Shared with" companies are not allowed to link other companies to the asset. As a result, the Linked companies feature is not visible for "Shared with" companies as seen in the example screenshot below:



To link a new company to the asset:

- 1. Click the ADD LINK + button.
- 2. In the **Relationship** field, select the company relationship from the drop-down menu.
- 3. In the With field, select the company from the list.
- 4. Click the ADD + button.

To unlink a company, click on the icon.



You can also filter the Linked companies list by typing the company name in the **Filter** field, or choosing the relationship type in the **Filter** drop-down menu.

#### Change status

**Change status** shows the current status of the asset, but also allows you to change the status to a new one.

This function is a collaboration between the owner of the asset and any linked companies. The below use case illustrates how such a collaboration might work.

#### Use case:

When the owner sends out an asset for repair to a linked company that is manufacturer, the owner might change the status to "In transport".

After the manufacturer has received your asset, he then changes the status to "Received by manufacturer", then to "In production at manufacturer", to "Finished at manufacturer", and finally to "In transport" again, so that the owner can always track the status of the asset.

When the owner has received the asset again, the status can be changed to "On site" by the owner.

#### Merge timelines

Two different assets might have been created that are actually about one physical asset. To avoid confusion or inconsistencies, in **Merge timelines**, the owner or "Shared with" company can merge the timelines of two assets to create only one timeline.

To merge two timelines:

- In the From field, search for the asset that you want to merge into another.
- 2. In the **To** field, search for the asset that needs to receive the information from the asset in the **From** field.
- 3. Click Merge to merge the two timelines.

## Tasks and notifications

**Tasks and notifications** contains an overview of the tasks related to the asset. You can filter by assignee, occurrence and status.

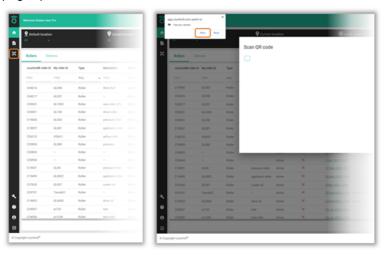
Ask your countroll® contact person for more information about the **Tasks and notifications** functionality.



# Scanning QR code

Scanning the QR code of a roller is a functionality that was initially implemented for the smartphone app. In some cases, however, it turned out to be useful to have this functionality also in the web portal. The performance is not on the same level as with the smartphone app. A lot depends on the quality of the camera.

Click on the **Scan QR code** icon and give the permission for the countroll® web portal to use your device's camera. Then hold the QR code as stable as possible in front of the camera and find the correct distance to focus. When the QR code is recognized, the roller details page opens.







# **Admin page**

The Admin page contains the management of 4 items related to your organization:

- · location management
- managing countroll® users and their permissions
- · managing countroll® preferences
- · company profile management

#### Locations

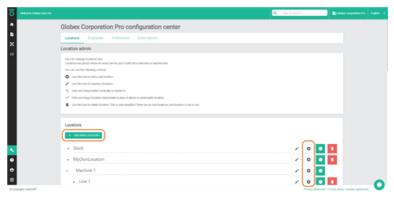
Locations are predefined places/positions to which a QR code or bar code can also be linked. Examples of such a place or position could be:

- · buildings on a site
- · spaces within a building
- · positions in a machine line
- · stock places for rollers or assets in general

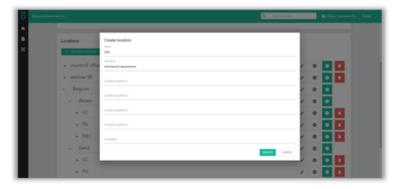
If these locations have existing bar codes/QR codes, these can be reused within countroll®. Or you can also assign new codes. Linking a bar code/QR code to a location must be done with the smartphone app or with the web portal on a tablet, because the camera is required for this. Creating new locations or managing them is done in the web portal.

## Adding locations

- 1. Do one of the following:
  - To add a new location, click the Add new location button.
  - b. To add a new location below an existing one, click the button next to the existing location.



- 2. Now enter the name of the location. Optionally, also enter a description and certain properties.
- 3. Click Create to create the new location.



#### Moving the location

You can also move the location or put it on a different (sub)level.

- 1. Click on a location and hold down the button.
- 2. Meanwhile move the location up or down and release the button at the correct position.



## Changing the name of the location

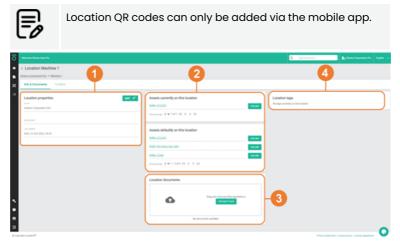
- 1. Click the ricon.
- 2. Click on the icon to save or on the icon to cancel

#### Location information

Click on the icon to view and edit more detailed information of the location.

In the **Info & Documents** part of the location information, you can do the following:

- View and adjust the properties of the location by clicking the Edit button.
- View and unlink assets currently on the location and/or assets on the location by default.
- 3. View and upload files related to the location.
- 4. View location tags.

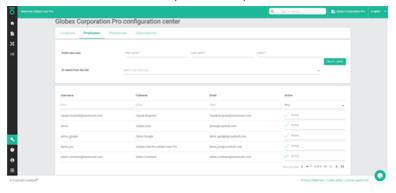


In the **Timeline** part of the location information, you can see any events that relate to the location in question.

## **Employees**

The **Employees** page shows an overview of all users within your company who have already created a countroll® account. The fact whether the account is still active and what rights the users have are also shown. This page is intended to be able to consult data and to manage the accounts as an administrator of your company:

- activate/deactivate accounts
- · invite new users directly in the web portal



## Activating/deactivating accounts

An account is active when the status in the **Active** column is **Active** and deactivated when the status is **Disabled**.

- 1. Click Disabled to activate an account.
- 2. Click to deactivate an account.

#### Inviting new users

- 1. Enter the first name, last name and email of the new user.
- 2. Click the Invite User button.



There is no limit on inviting users to your organization on the countroll® web portal, but you can only invite users for the organization that you are logged in as.



If the person you invited has not accepted their invitation, you can send a reminder:

- In the Or select from the list field, select a user from the Select user from list drop-down list.
  - Users who appear in the list, are all users who have been previously invited, but have not accepted the invitation.
- 2. Click the Invite User button.

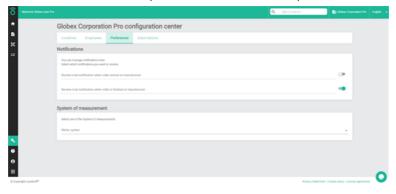
#### **Preferences**

On the **Preferences** page you can manage notifications and the system of measurement.

In the **Notifications** section you can enable or disable email notifications for when:

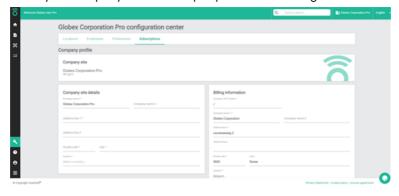
- · the roller has arrived at the manufacturer,
- the roller has been finished at the manufacturer.

In the **System of measurement** section, you can decide to visualize all measurements in the web portal as either metric or imperial.



## Subscriptions

The **Subscriptions** page displays the info that is kept within countroll® about your company such as company details and billing information.





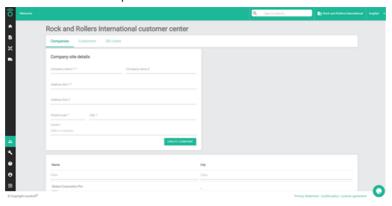
## **Customer center**

The Customer center is only available for manufacturers.

Click on the icon to access the **Customer center**.

On the **Companies** page, you can:

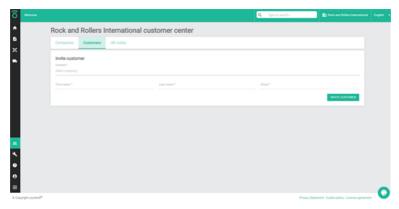
- View and filter a list of all companies that are your clients.
- Add new companies to the list.



- 1. Enter the client's company name.
- 2. Enter the address details.
- 3. Click the Create company button.

On the **Customers** page, you can:

- Invite employees of your clients to the web portal.
- View existing employees in the system for each client.



- Select the client's company name from the drop-down menu.
  - After you selected the customer, you also get a list of employees that have already been added.
- 2. Enter the first name, last name and email of the new user.
- 3. Click the Invite customer button.



There is no limit on inviting employees on the countroll® web portal, but you can only invite employees for the companies that you have added as clients.

On the **QR codes** page, you can view and filter a list of all registered codes.



# **Reception page**

The **Reception** page is for manufacturers only.



click on the icon to access the **Reception** page.

On the **Reception** page, the manufacturer has an overview of all assets that have been received and the packaging in which they arrived, because the packaging is linked to the assets that were inside it. When the repairs on the asset are finished, they can be easily shipped back using the same packaging they arrived in by using the **Reception** page.

# **FAQ page**

We have tried to answer most Frequently Asked Questions via an FAQ section on the countroll® website (https://www.countroll.com/FAQ).

Both from the Login page and under the icon of the FAQ page there is a link to that FAQ section.



# Glossary

- Roller Supplier and Roller Manufacturer are synonyms in this manual
- End-customer: customer of a roller supplier
- Roller core: the metal core
- Roller cover: the material applied on the core (e.g. rubber, PU, etc.)



# **Profile page**

On the **Profile** page you can manage the details of your account and change your password.





# **Support**

If you have any questions or concerns, please get in contact with our customer care staff.

