IndySoft Dataview Browser Edition

Document Date: 8/28/2013

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1 User Functionality

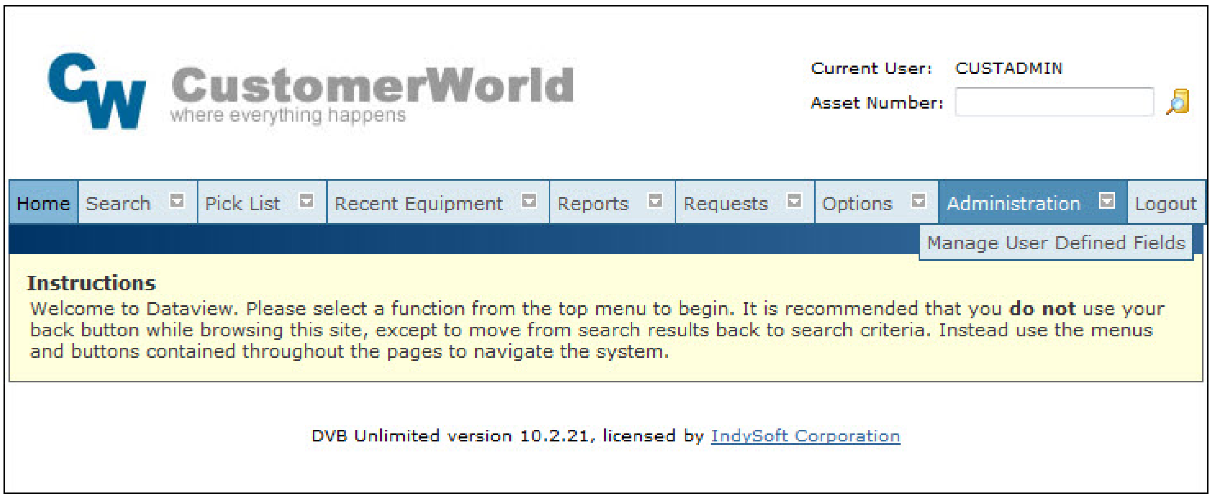
The following section outlines general usage of DVB Unlimited along with explanations of how certain aspects are influenced by your InSite core system.

1.1 Administration

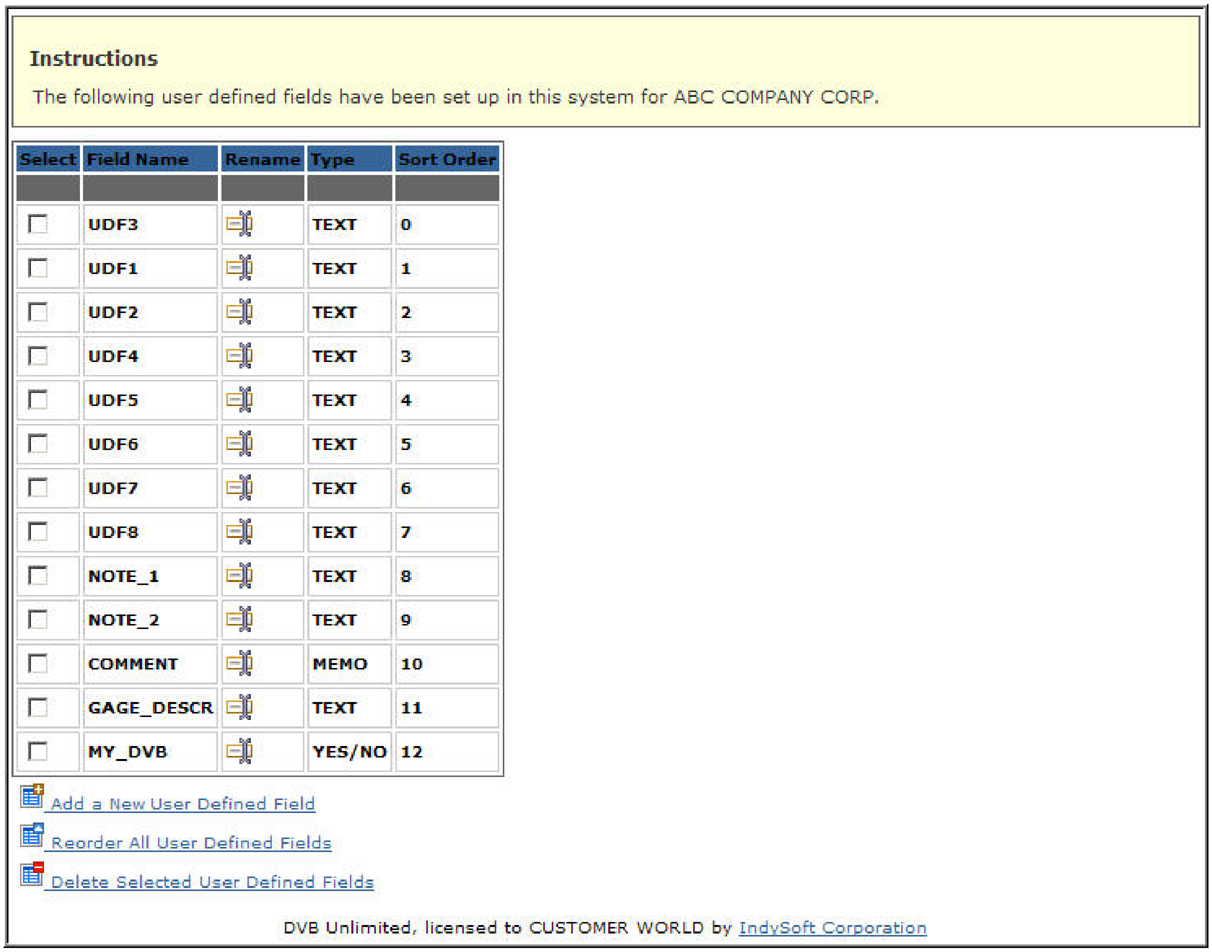
CUSTOMER ADMINS have access to a limited set of options on the Administration menu... specifically speaking, they have access to manage the user defined fields (DVB_UPDATE) for their company.

1.1.1 User Defined Fields

Management of User Defined fields is accomplished by selecting Manage User Defined Fields from the Administration menu



After selecting this option, the user defined fields interface will appear after selecting a company.



Instructions

The following user defined fields have been set up in this system for ABC COMPANY CORP.

Select	Field Name	Rename	Type	Sort Order
	UDF3		TEXT	0
	UDF1		TEXT	1
	UDF2		TEXT	2
	UDF4		TEXT	3
	UDF5		TEXT	4
	UDF6		TEXT	5
	UDF7		TEXT	6
	UDF8		TEXT	7
	NOTE_1		TEXT	8
	NOTE_2		TEXT	9
	COMMENT		MEMO	10
	GAGE_DESCR		TEXT	11
	MY_DVB		YES/NO	12

Add a New User Defined Field

Reorder All User Defined Fields

Delete Selected User Defined Fields

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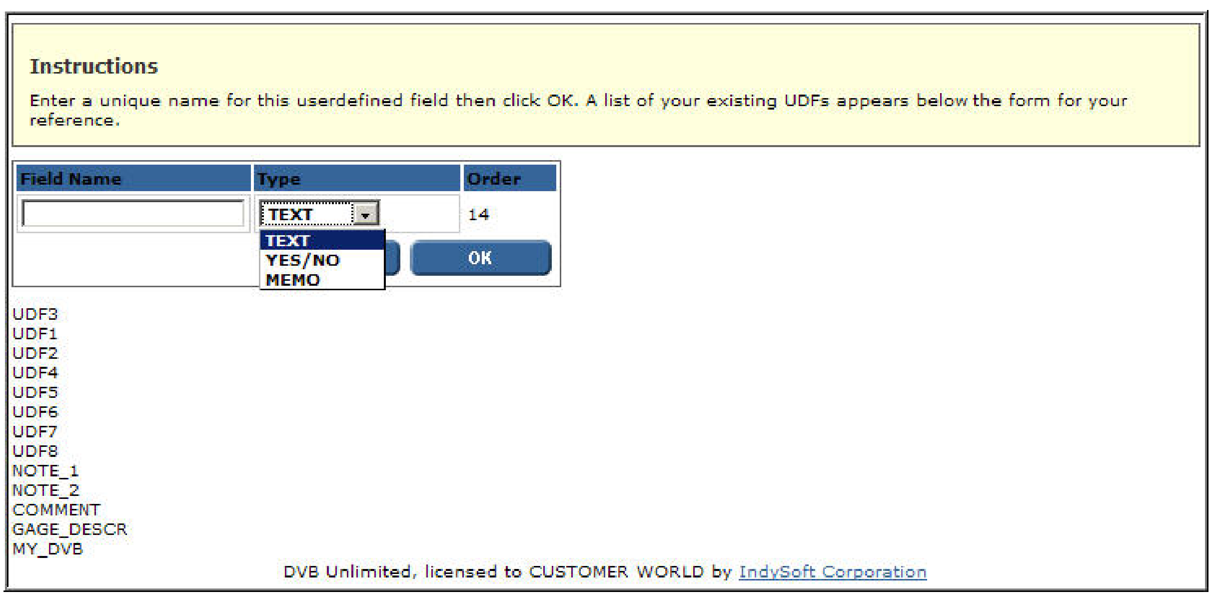
1.1.1.1 Adding a New User Defined Field

To add a new field, simply select the Add New User Defined Field link from the bottom of the UDF view page.



Instructions

Enter a unique name for this userdefined field then click OK. A list of your existing UDFs appears below the form for your reference.

Field Name	Type	Order
	TEXT	14

TEXT
YES/NO
MEMO

OK

UDF3
UDF1
UDF2
UDF4
UDF5
UDF6
UDF7
UDF8
NOTE_1
NOTE_2
COMMENT
GAGE_DESCR
MY_DVB

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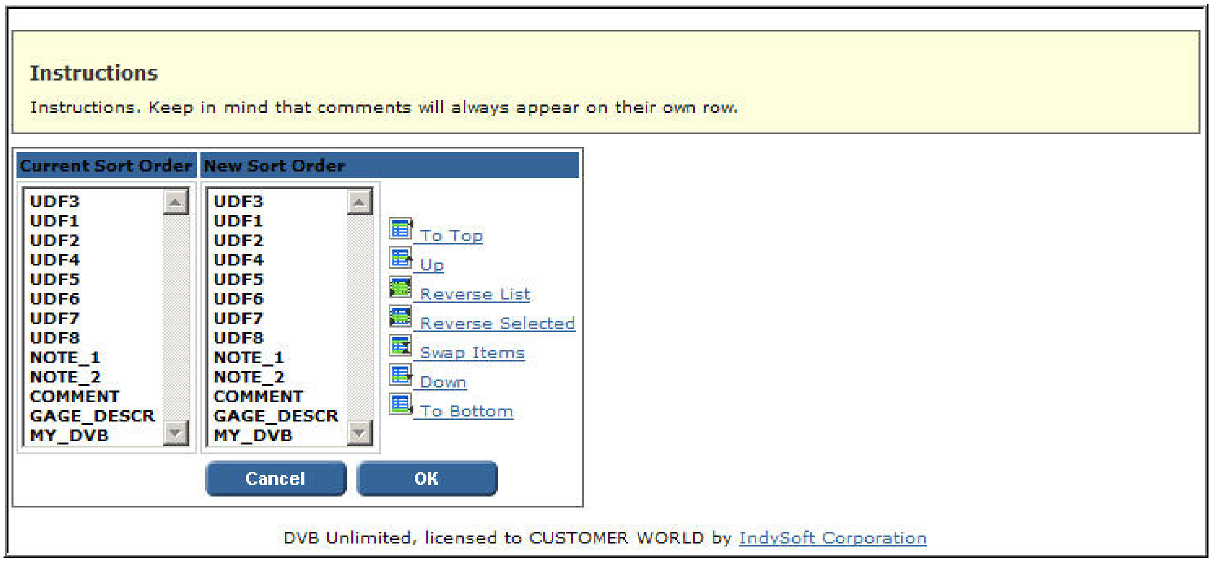
Enter the name of the field and select its type then click OK to add the field.

1.1.1.2 Reordering User Defined Fields

You can reorder UDFs in the web interface by clicking the corresponding link at the bottom of the UDF view page.

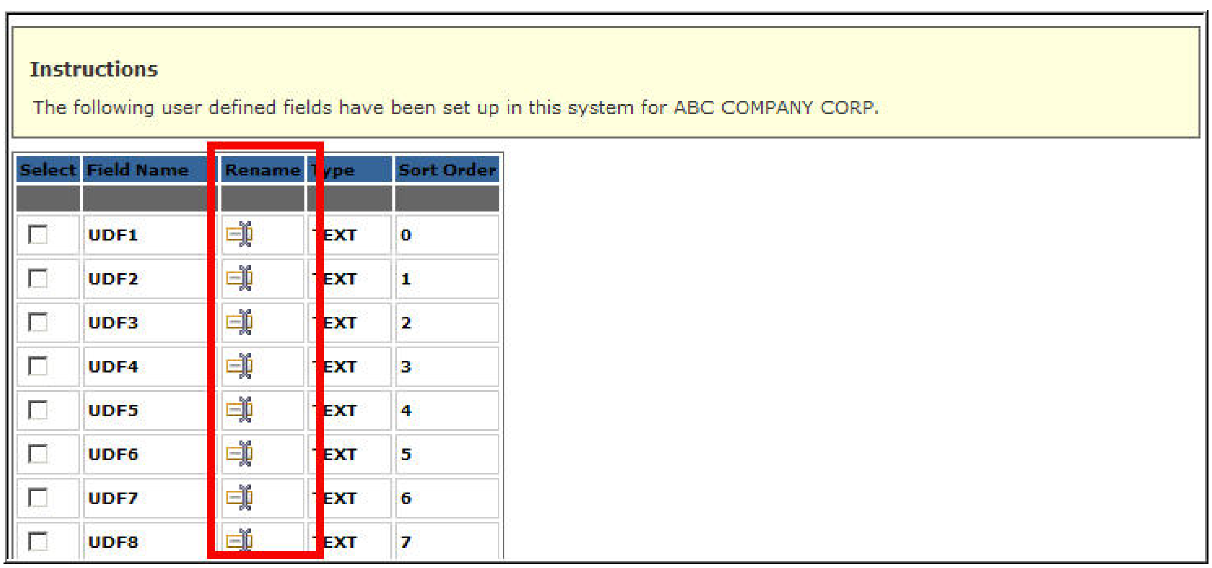


After selecting this link a page will load showing the current sort order and a list of buttons allowing you to multi or single select items and reorder the list as desired

Once the sort order is determined, click OK to finalize your sorting options

1.1.1.3 Editing User Defined Fields

To edit a user defined field, select the edit icon next to the UDF name in the UDF list view.

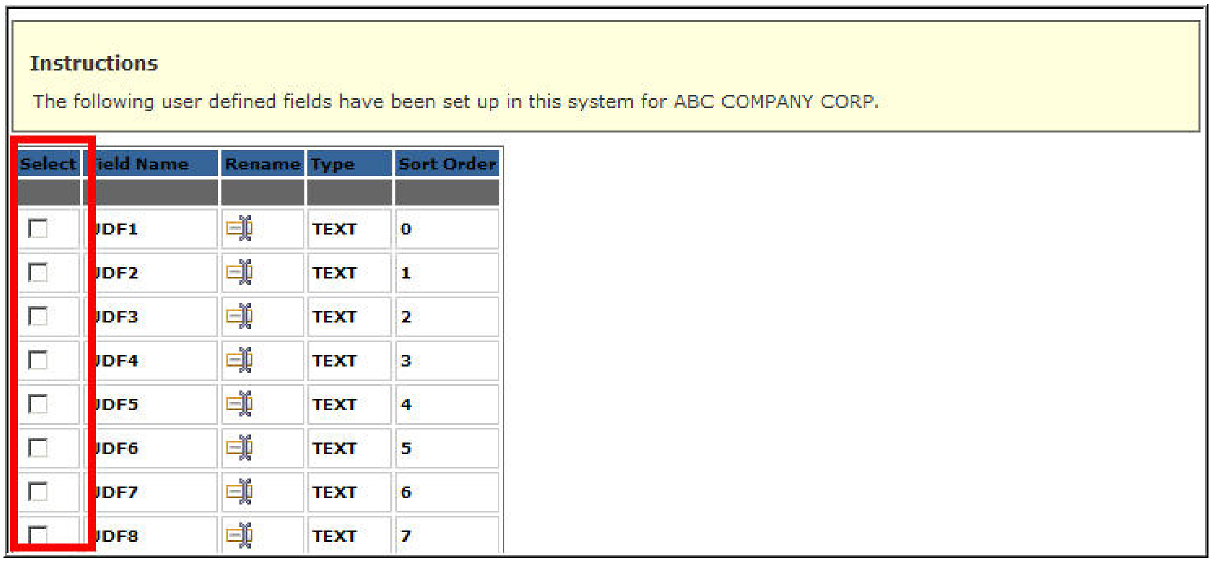


Editing is accomplished in the same manner as adding a new UDF

Click next to finalize the edit and return to the UDF list view.

1.1.1.4 Deleting User Defined Fields

To delete one or more user defined fields, select the checkbox next to the UDF name then click the delete selected UDF(s)

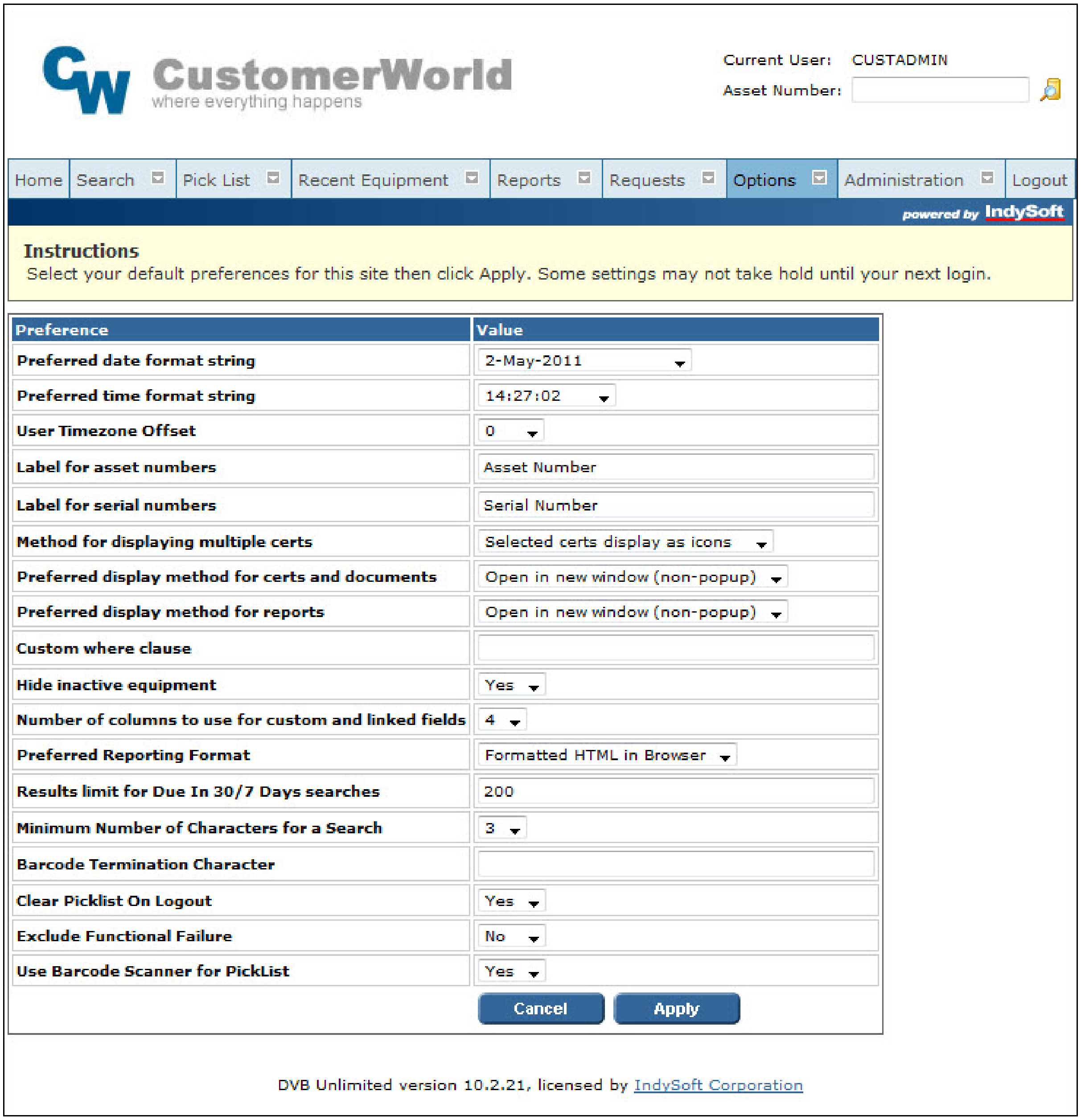


A confirmation message will prompt to you execute the action followed by returning to the UDF list view.

1.2 Options

Options allow end users to override certain systemwide options for their own preference, and allow them to change their password without administrative involvement.

1.2.1 User Preferences



User prefereces are accessed by clicking on the User Preferences option under the Options menu. The options represent a limited set of the SystemWide options and are defined as follows:

Preferred date format string
This option allows you to control how date information will be displayed to you.

Preferred time format string
This option allows you to control how time information will be displayed to you.

User Timezone Offset
This feature is currently not required for usage of the product.

Label for asset numbers
This value determines the label for an asset's unique identifier throughout the system.

Label for serial numbers
This value determines the label for an asset's serial number throughout the system.

Method for displaying multiple certs
This option sets the default listing behaviour for 'multi-cert mode'. When presented with a list of searched for assets, the user has the ability to gather selected assets into a formatted list for viewing. The options allow the user to view the certs from the certs menu within an embedded frame, as a list of icons whee each item opens based on the preferred display method, or as a text list utilizing the same preferred display method.

Preferred display method for certs and documents
This dictates the default behaviour for opening certificates of calibration or event attachments in the system. For systems where JavaScript popup blockers are a concern, you may wish to use the Open In New Window option.

Preferred display method for reports
This dictates the default behaviour for opening reports in the system. For systems where JavaScript popup blockers are a concern, you may wish to use the Open In New Window option.

Custom where clause
The custom where clause allows for addition of simple SQL qualifiers in excluding GAGES related fields in reports and searches. For instance, if your CUSTOM1 checkbox was 'Government Owned' gages and you wished to hide those for the user, you would simply add AND GAGES.CUSTOM1<>'1' to this entry

Hide Cal Date when Year-Week Displayed
This will cause searches/reports to not display Cal Due Dates for equipment in companies that display Year-Week Due Dates.

Hide inactive equipment
This will remove any equipment from reports and searches where the 'Active' checkbox is unchecked

Number of columns to use for custom and linked fields
This option determines whether a user is given one or four columns for displaying custom and linked fields in searches and reports. It can be useful to avoid scrolling sideways when enter criteria.

Preferred Reporting Format
This option sets the default format for Reports. The options are: Excel in Browser, Formatted HTML in Browser, and Simple HTML in Browser.

Results limit for Due In 30/7 Days searches
This determines how many search results are "too many" to be a practical list. A search that would return more gives a prompt to use a different search.

Minimum Number of Characters for a Search
This option determines how many characters you must enter when searching for companies, equipment, etc. This should not be longer than your shortest asset/company name.

Barcode Termination Character
This is a single character that is used to mark the end of barcode entry for barcoded pick list entry.

Clear Picklist On Logout

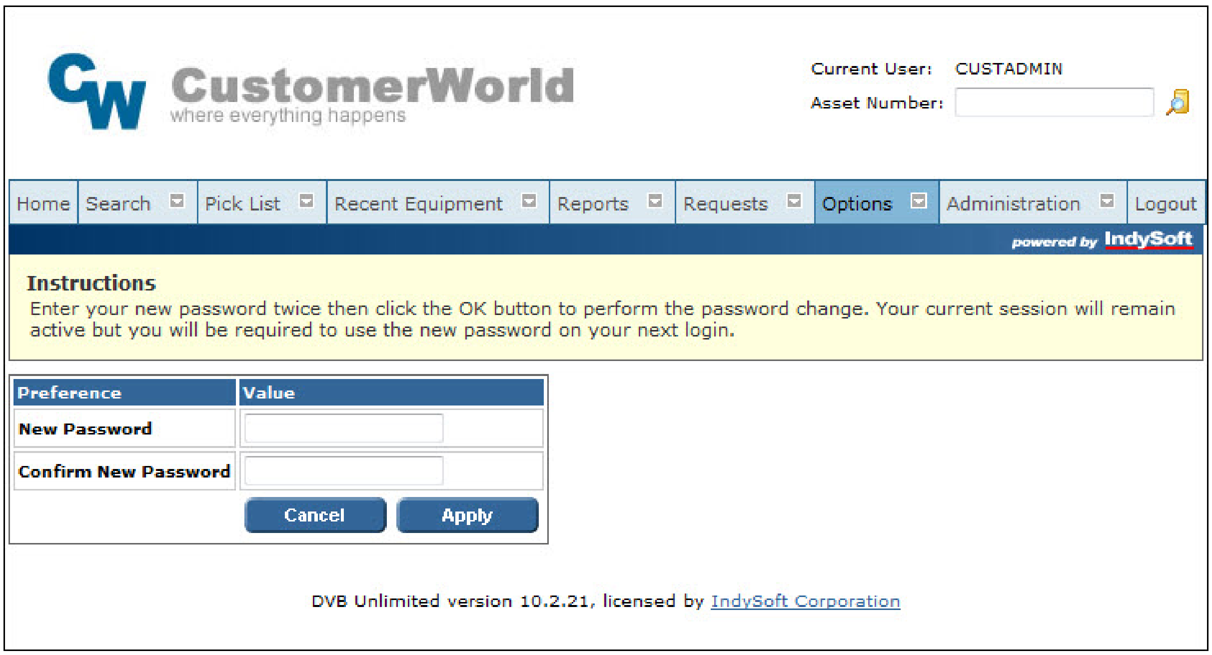
This option determines whether you want to keep your picklist between sessions.

Hide unused tracking statuses
This option lets you hide current statuses that are not associated with any equipment in Advanced search and Current Status search.

Exclude Functional Failure
This option has not been implemented yet.

Use Barcode Scanner for Picklist
This option determines whether the Barcode Pick List menu option will be displayed. If you are not using a barcode scanner, it is probably best to not use this.

1.2.2 Changing Your Password



Users can change their password by selecting the change password option from the options menu.

Enter the new password, followed by confirmation of the new password, then click apply. The change takes effect upon next login.

1.3 Searching For Equipment

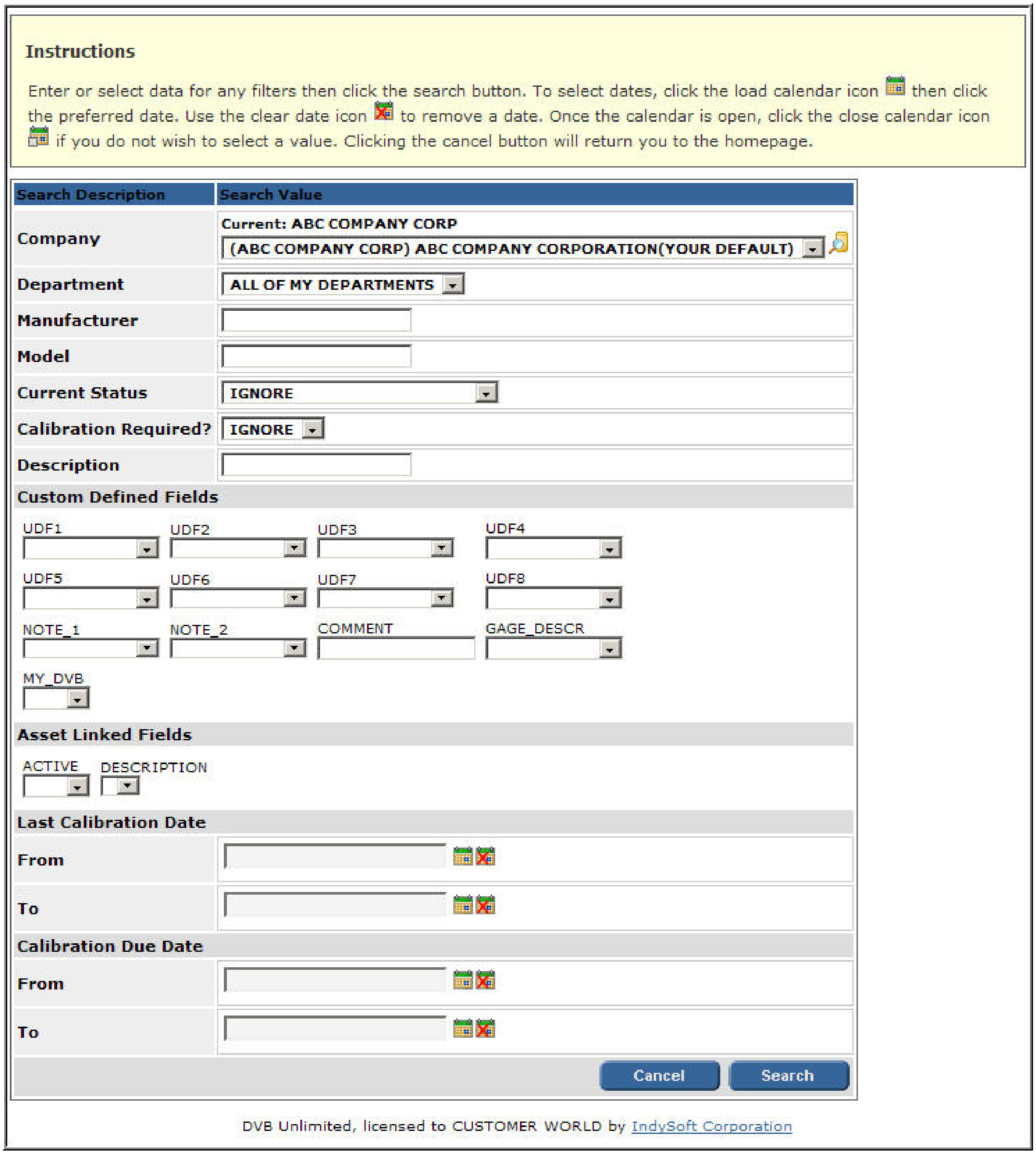
Searches provide a quick way to gather lists of equipment, build access to multiple certs for review, or generate pick lists for service requests.

1.3.1 Quick Search

At the top of the screen is a quick-search box. Type in the the beginning characters of the asset number that you wish to find. The system will find all assets that begin with those characters. This is almost the same as selecting Search: Asset Number from the menu.

1.3.2 The Basics of Searching

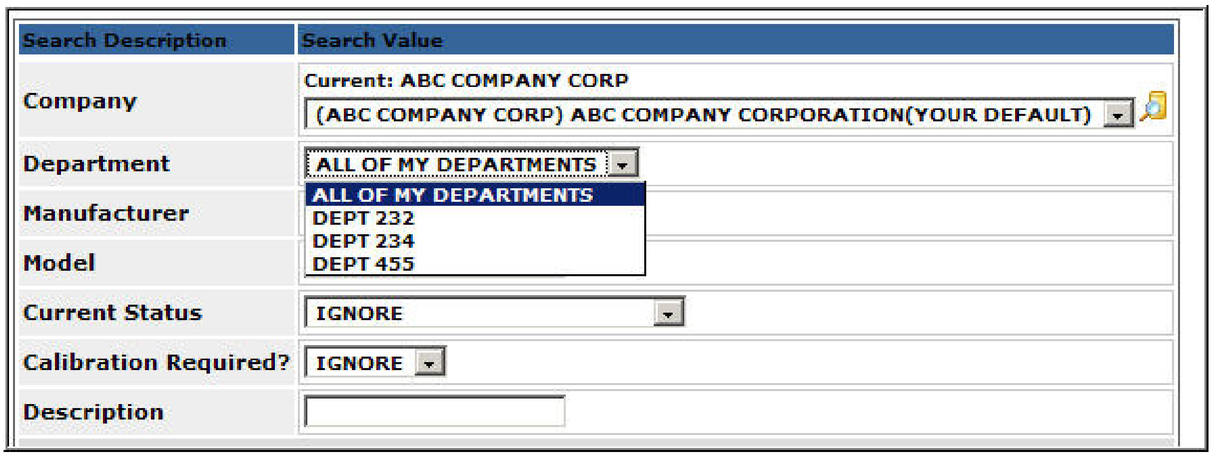
Searches are accessed through the Search Menu. Depending on your deployment, multiple types of searches may be available, so we'll focus instead on the Advanced Search components, which make up the bulk of options you'll find in the rest of the searches on the menu.



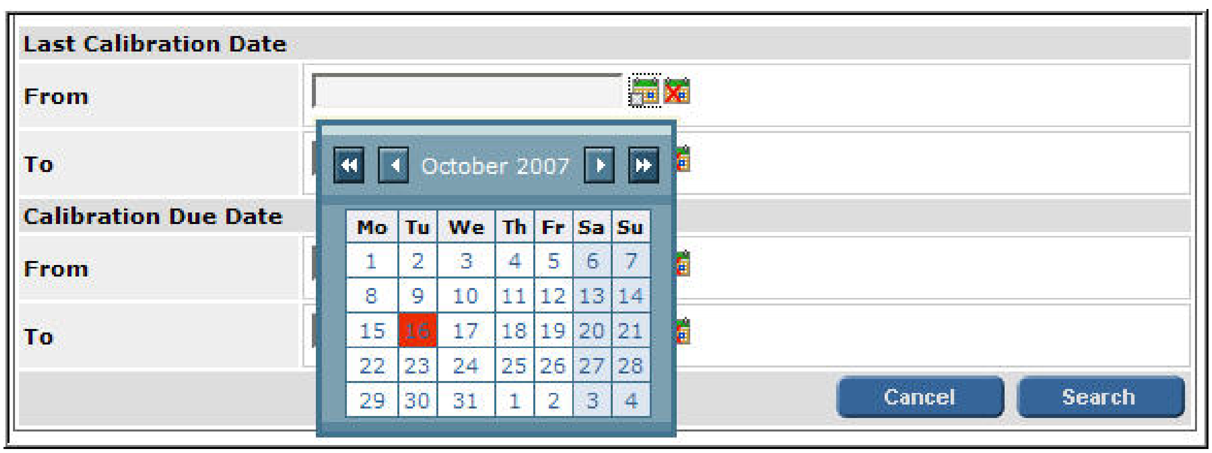
The advanced search provides access to a user's companies, departments, Manufacturers, Model Numbers, Current Status of equipment and all of their DVB_UPDATE or DVB_LINKED user defined fields.

Using the company selector

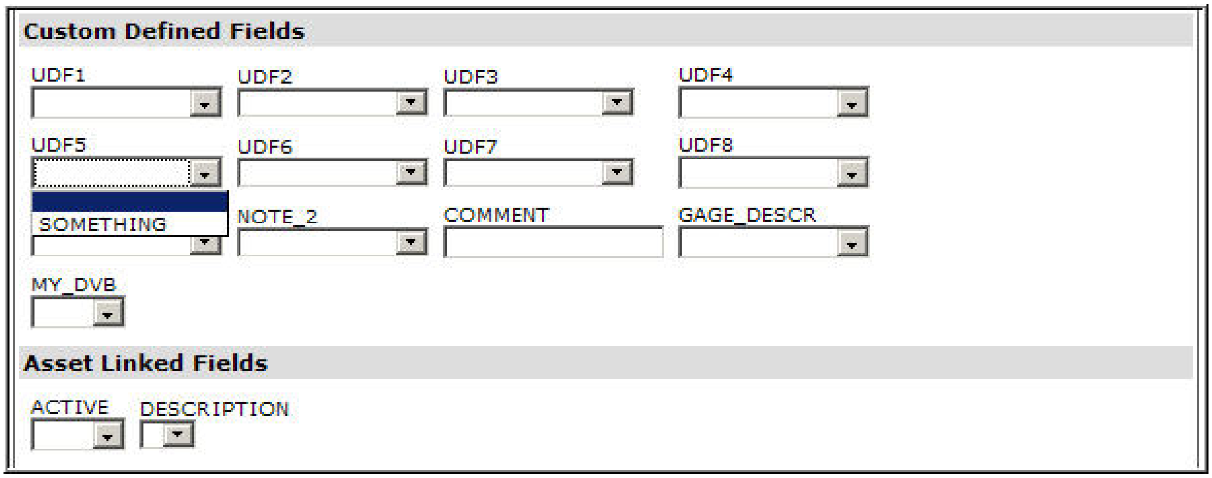
Clicking the dropdown for the company will allow the user to change which company (or all of their companies) they wish to perform the search against. You must click the button to confirm the change of company.



Departments show as a dropdown, filtered by the currently selected company.



Date widgets. When searching for due dates, you may have the option to search based on the due Year-Week, rather than a date. Simply use the drop-downs to select the Year and Week instead of using date ranges.

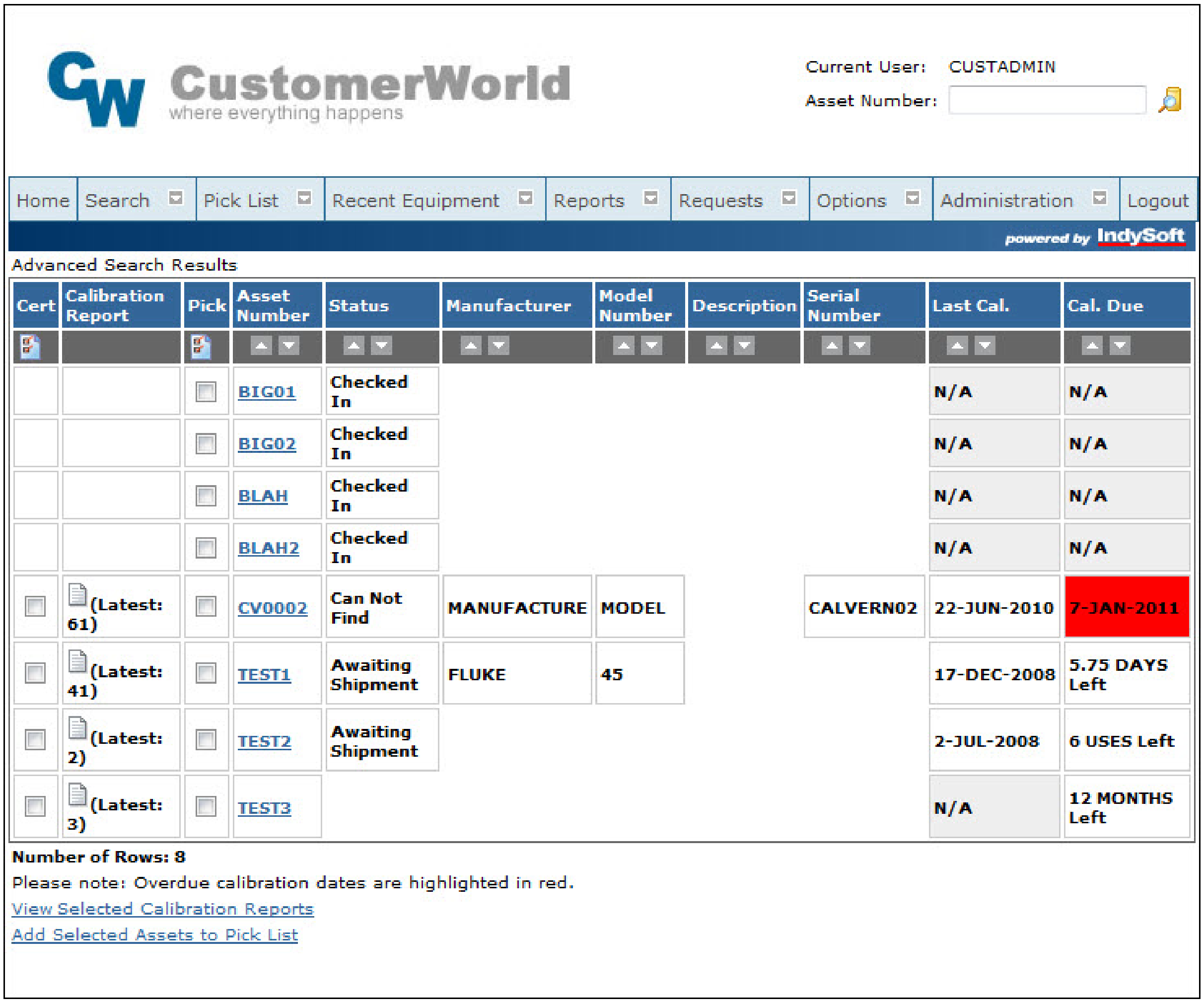


UDFs (linked orUpdate.. same)

Clicking Search will reveal a filtered grid of the related assets.

1.3.3 Working With Search Results

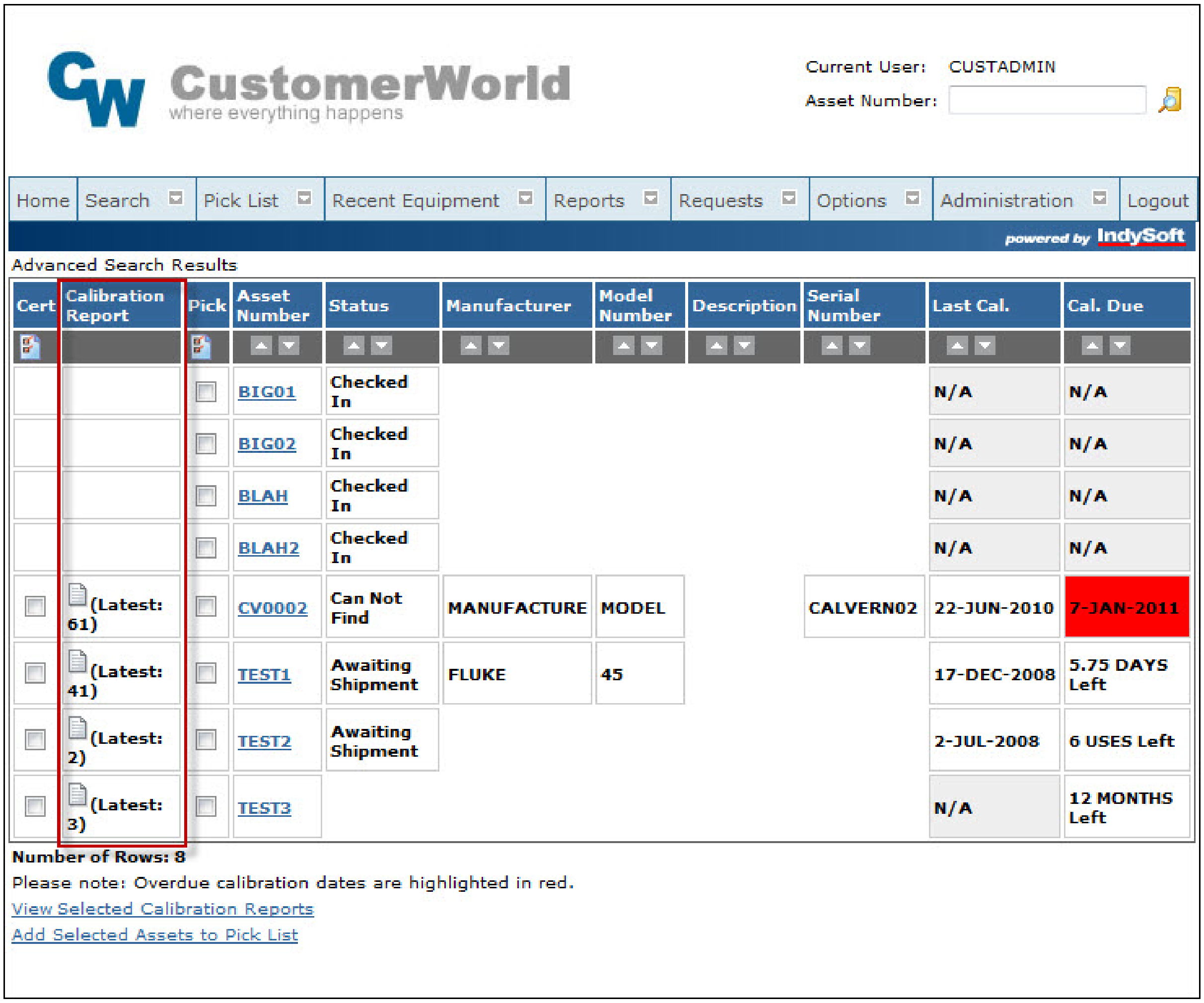
Depending on your search criteria, you will be presented with a grid of one or more assets related to the search.



Cert	Calibration Report	Pick	Asset Number	Status	Manufacturer	Model Number	Description	Serial Number	Last Cal.	Cal. Due
			BIG01	Checked In					N/A	N/A
			BIG02	Checked In					N/A	N/A
			BLAH	Checked In					N/A	N/A
			BLAH2	Checked In					N/A	N/A
	(Latest: 61)		CV0002	Can Not Find	MANUFACTURE	MODEL		CALVERN02	22-JUN-2010	7-JAN-2011
	(Latest: 41)		TEST1	Awaiting Shipment	FLUKE	45			17-DEC-2008	5.75 DAYS Left
	(Latest: 2)		TEST2	Awaiting Shipment					2-JUL-2008	6 USES Left
	(Latest: 3)		TEST3						N/A	12 MONTHS Left

Number of Rows: 8
Please note: Overdue calibration dates are highlighted in red.
View Selected Calibration Reports
Add Selected Assets to Pick List

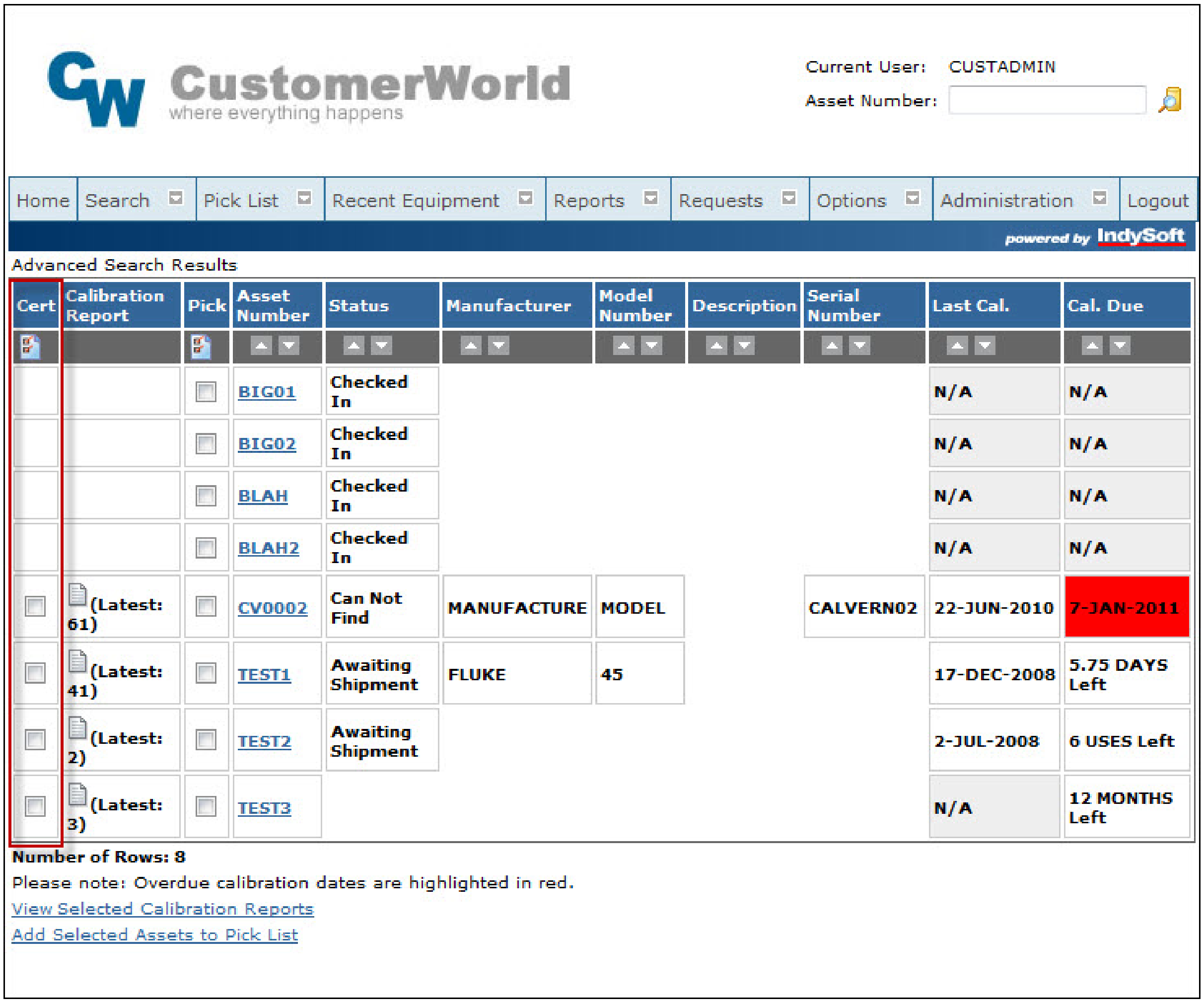
From the results screen you can select any Asset number to view the asset details.



You can also click the Calibration Report icon to view the latest calibration certificate available for that asset.

MultiCert Viewing

When multiple assets are present you can select the checkboxes in the Multi column then select the View Multiple Calibration Reports link at the footer of the search page



Cert	Calibration Report	Pick	Asset Number	Status	Manufacturer	Model Number	Description	Serial Number	Last Cal.	Cal. Due
			BIG01	Checked In					N/A	N/A
			BIG02	Checked In					N/A	N/A
			BLAH	Checked In					N/A	N/A
			BLAH2	Checked In					N/A	N/A
	(Latest: 61)		CV0002	Can Not Find	MANUFACTURE	MODEL		CALVERN02	22-JUN-2010	7-JAN-2011
	(Latest: 41)		TEST1	Awaiting Shipment	FLUKE	45			17-DEC-2008	5.75 DAYS Left
	(Latest: 2)		TEST2	Awaiting Shipment					2-JUL-2008	6 USES Left
	(Latest: 3)		TEST3						N/A	12 MONTHS Left

Number of Rows: 8

Please note: Overdue calibration dates are highlighted in red.

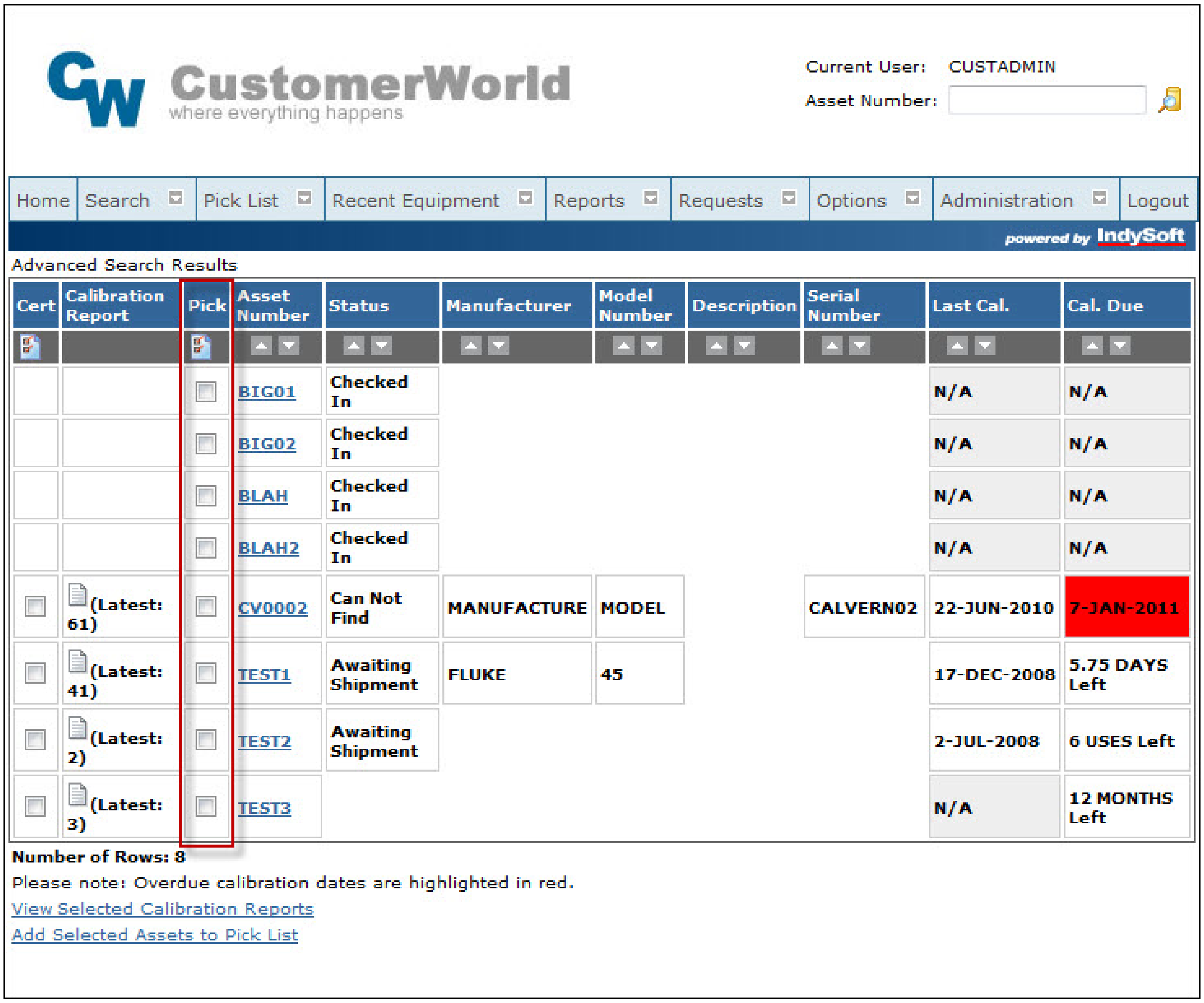
View Selected Calibration Reports

Add Selected Assets to Pick List

A page will then load allowing you to quickly switch between all the certs without performing lookups for each individual asset.

Pick List Creation

As you search out assets, you can tick the pick checkbox next to items then select the 'Add Selected Item(s) to Picklist) link at the footer of the search.



This option then places a reference to the items into your own personal 'picklist' of equipment where it can then be quickly re-referenced or even built into a service request.

1.3.4 Summary of Searches

The available searches in DataView Browser are described below:

Advanced: This search combines features of several of the searches listed below. For fields such as Manufacturer and Model, enter the first few characters you want to search for. If you select a Date Based schedule type, with no Calibration Due Date information, your search will return all equipment with all schedule types (including those without calibration schedules). Calibration Due Date is only used when Date Based is selected. Accumulation Left options are only applied if you select an Accumulate Schedule Type for your search.

Asset Number: This search will return all assets beginning with the characters you type.

Cert Number: This search will return all assets that have a cert number beginning with the characters you type.

Current Status: This search will return all assets that have the selected current status (modified by the custom and linked field filters).

Description: This search will return all assets that have a description beginning with the characters you type (modified by the custom and linked field filters).

Due Date: By default, this will perform a Due in 30 Days search for the selected company. It can also perform a Due in 7 Days search or search by date range.

Due in 30 Days: This search returns all assets marked as past due or due within 30 days for all your companies. If the number of assets would exceed the limit you selected in your user preferences, it will instead display an error telling you how many assets would have been returned.

Due in 7 Days: This search returns all assets marked as past due or due within 7 days for all your companies. If the number of assets would exceed the limit you selected in your user preferences, it will instead display an error telling you how many assets would have been returned.

Manufacturer / Model Number: This is a three-step search. Step one is to select the company, department, and custom/linked filed filters. Step two is to select the manufacturer. Click on a character range to get a list of manufacturers in that range. Step three is to select an (optional) model number.

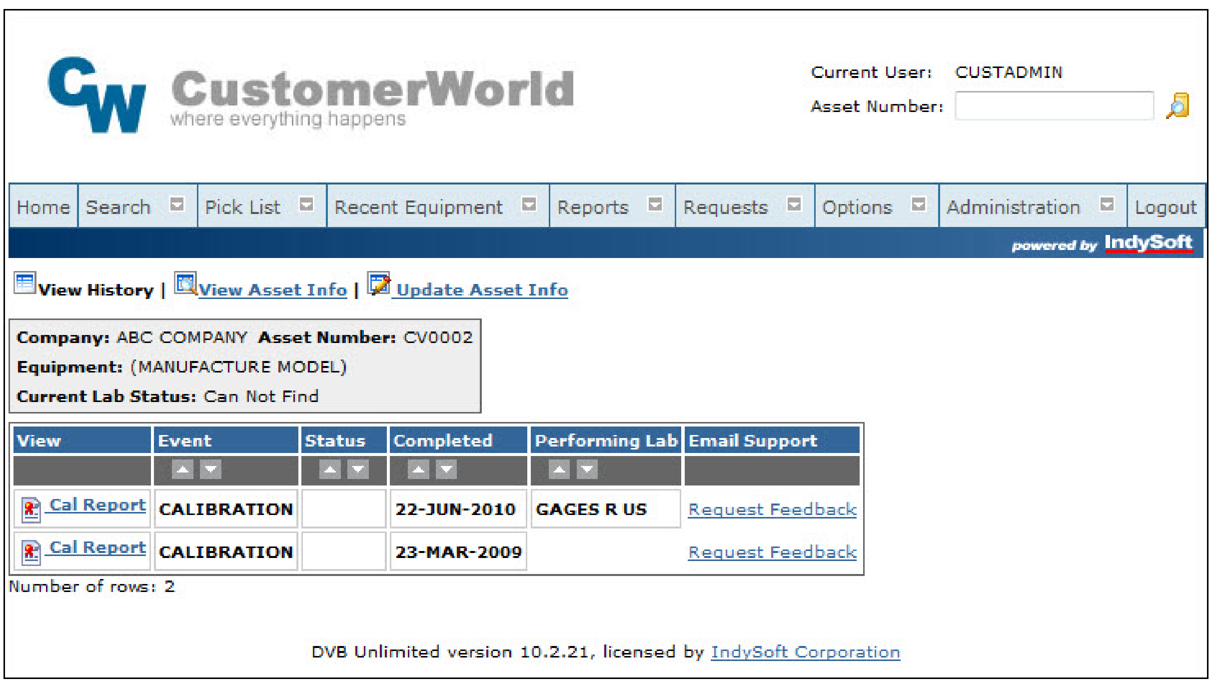
Serial Number: This search will return all assets with a serial number beginning with the characters you type. This is not the same as the asset number.

User Defined Fields: This search allows you to search using the company, department, and custom/ linked filed filters.

1.4 Working With Equipment Views

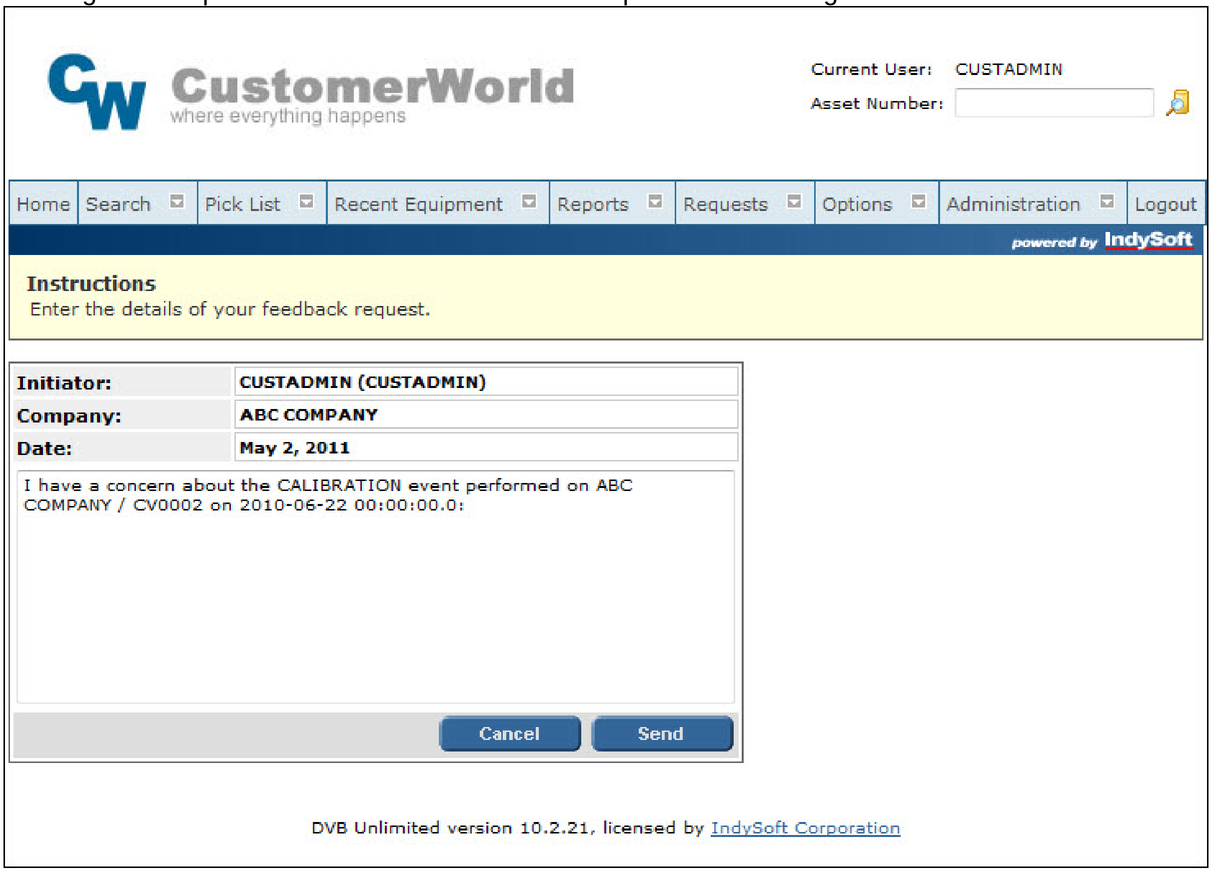
After searching for equipment and selecting an equipment link, or clicking any reference to an asset in the picklist or recent equipment, records will be displayed offering more detail about the assets.

1.4.1 Asset History



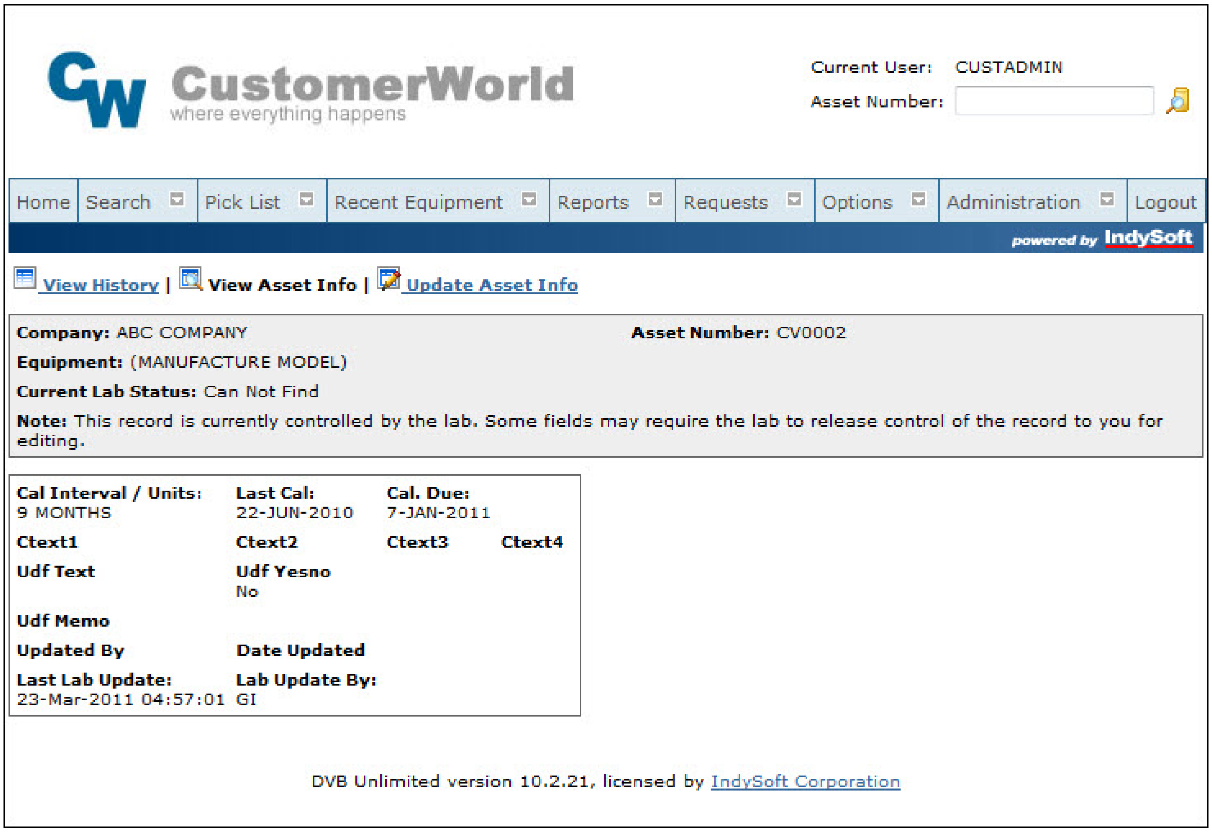
The asset history view provides a snapshot of all of the historical events performed against the equipment since first logged into the calibration management system. Clicking any link in the View column will reveal calibration certificates or other related event information. The documents that are visible is determined by how the event display has been configured by the web administrators.

Clicking the "Request Feedback" link for the event opens the following form:



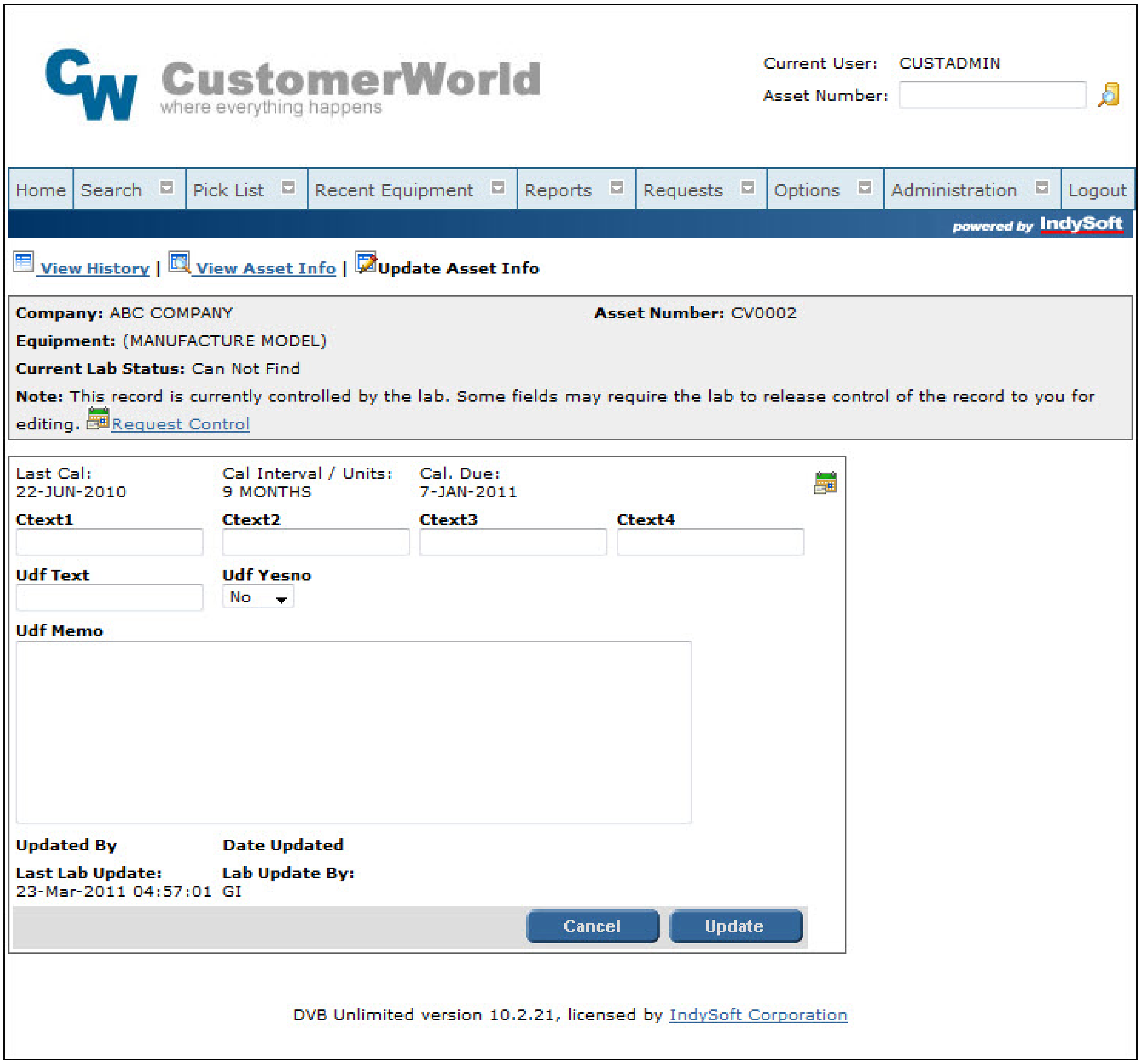
Simply add your message underneath the event description and click send. After the confirmation message you will be returned to the asset history.

1.4.2 Asset Info



The Asset information screen provides the key indicators for equipment along with calibration schedule information and all of the User Defined Fields for the particular company.

1.4.3 Editing Asset Information



Editing equipment information is provided through three key mechanisms: Customer controlled UDFs, Lab controlled Linked UDFs with Audit-Trail fallbacks and Audit-Trail recording of Schedule Updates. All of this functionality is controlled by the company and department accessibility criteria defined at the user level. No matter what the case, when the user has rights, they simply update the information required on the Update Asset Info screen and click the update button to complete the task.

Changes to Customer-Controlled UDFs (DVB_UPDATE Group)
Changes to these fields are immediate and pose no threat to the core asset records of the calibration system. Therefore there is no web audit trail event generated for these editing actions.

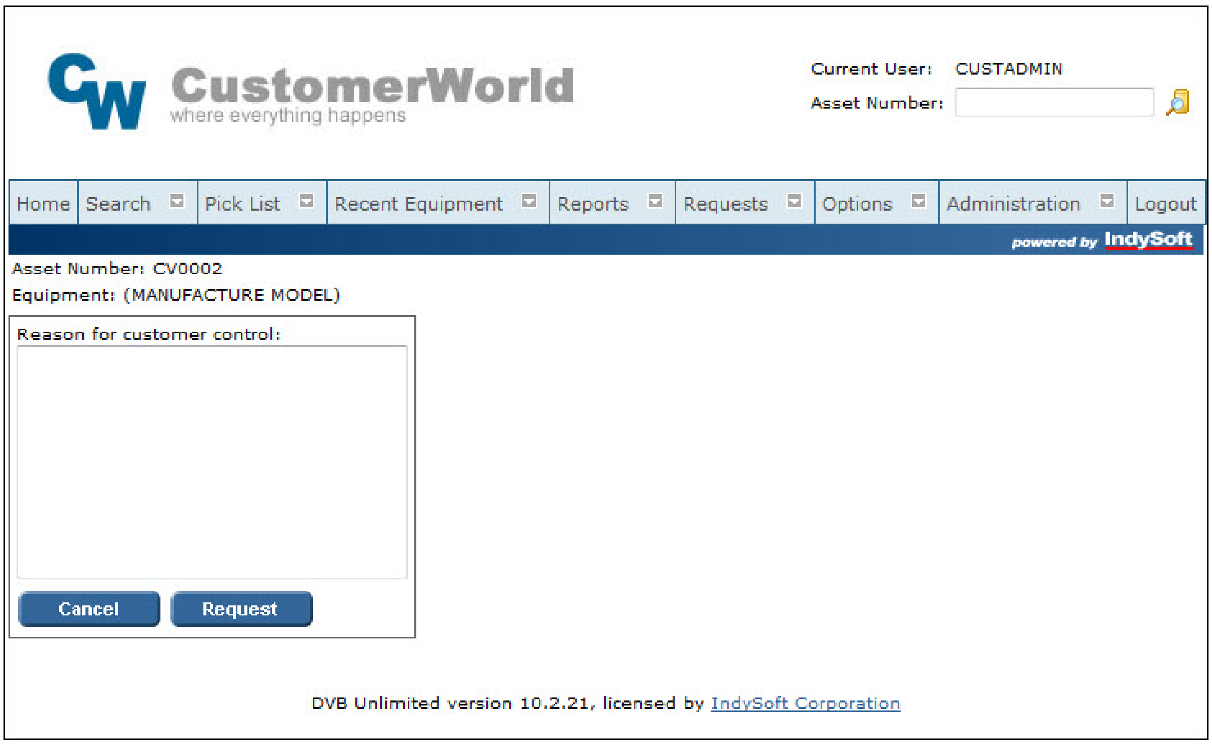
Changes to Lab-Controlled UDFs (DVB_LINKED Group)
These changes are immediate and due to the nature of the change (pushing unqualified data back to the core system) an web audit trail event is generated as a stopgap measure for the lab's protection. The audit trail notes the date, time and web user responsible for the change, along with a notation of the original and final changes to the data itself.

Changes to Calibration Schedules

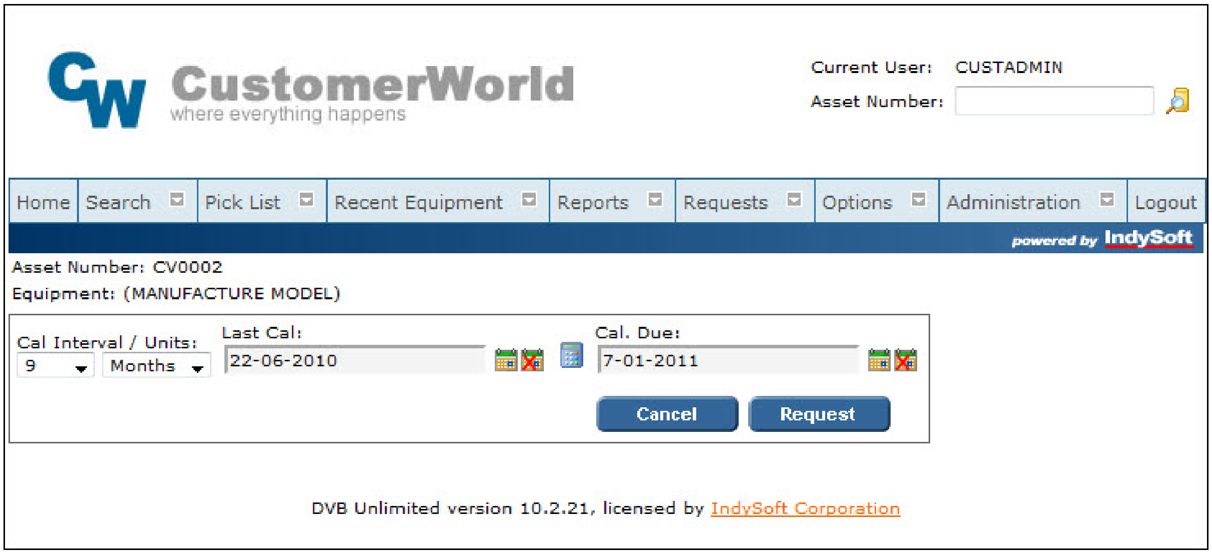
The last calibration date cannot be changed. Frequency and Interval along with next cal due date can be changed, but like DVB_LINKED fields, this creates an audit trail of the changes that took place. If the company is marked to show the calibration due date Year-Week, this information will be displayed when changing the due date.

Submitting Requests

If a piece of equipment is not marked as user controlled, then a user is able to Request Control. The user will be asked to provide a reason for the change in control. An incomplete event (CUSTOMER CONTROL REQUEST) will be created in Gage InSite containing information about the control request. To approve the change, open the event, mark it approved, and complete it. You can also choose to reject the request.

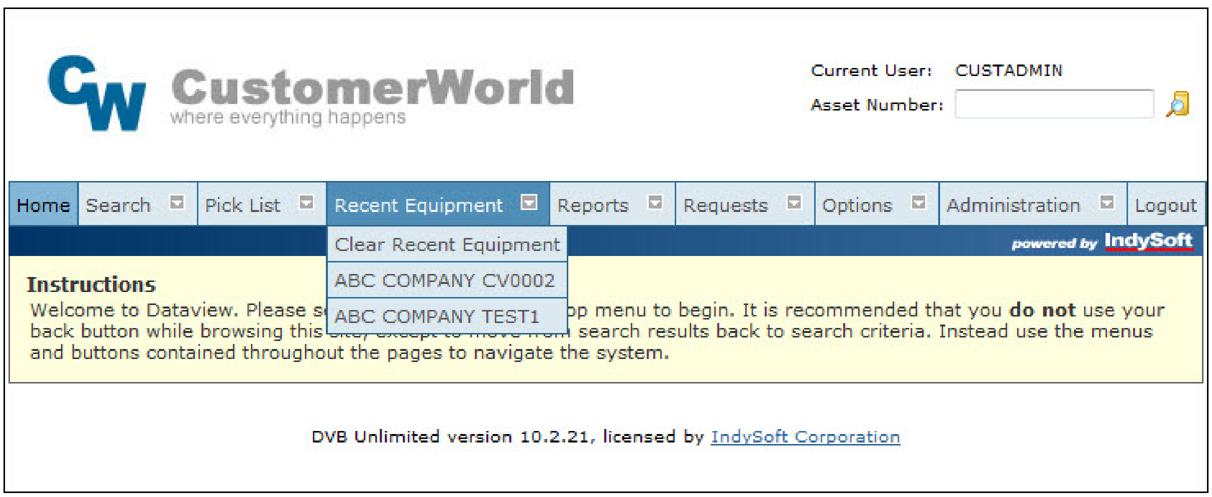


A user can also request a schedule change. The user will then be able to select the desired schedule. An incomplete event (WEB SCHEDULE UPDATE REQUEST) will be created in Gage InSite containing information about the requested change. The details of the requested schedule are stored in the DVB_VARS Extended Attributes. To approve the change, open the event, mark it approved, and complete it. You can also choose to reject the request. If the company is marked to show the calibration due date Year-Week, this information will be displayed when changing the due date.



1.5 Recent Equipment

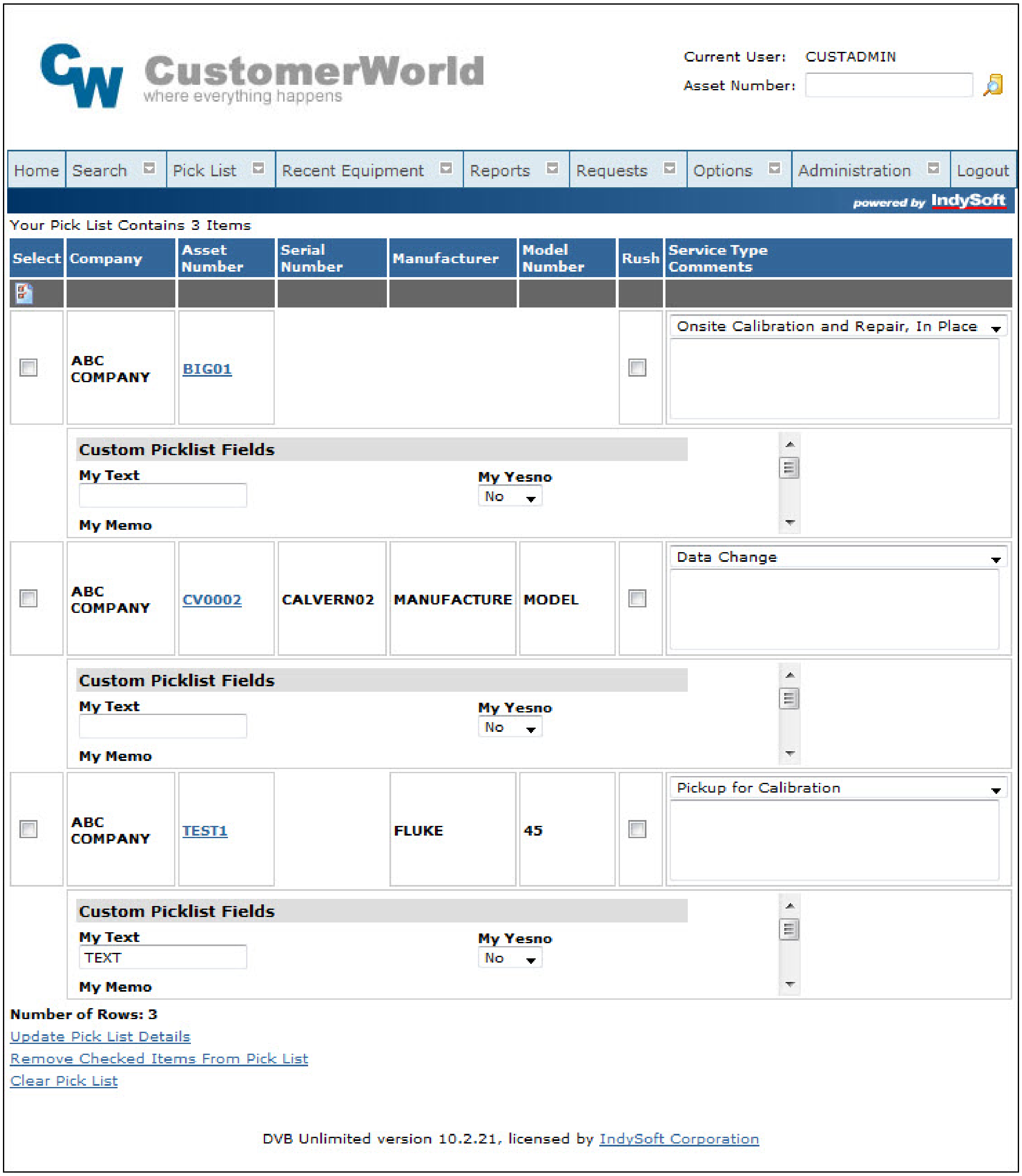
As you view Asset Information, references to the assets are added to your 'Recent Equipment Menu'.



This option allows you to easily toggle between equipment viewed during your current session.

1.6 Pick List

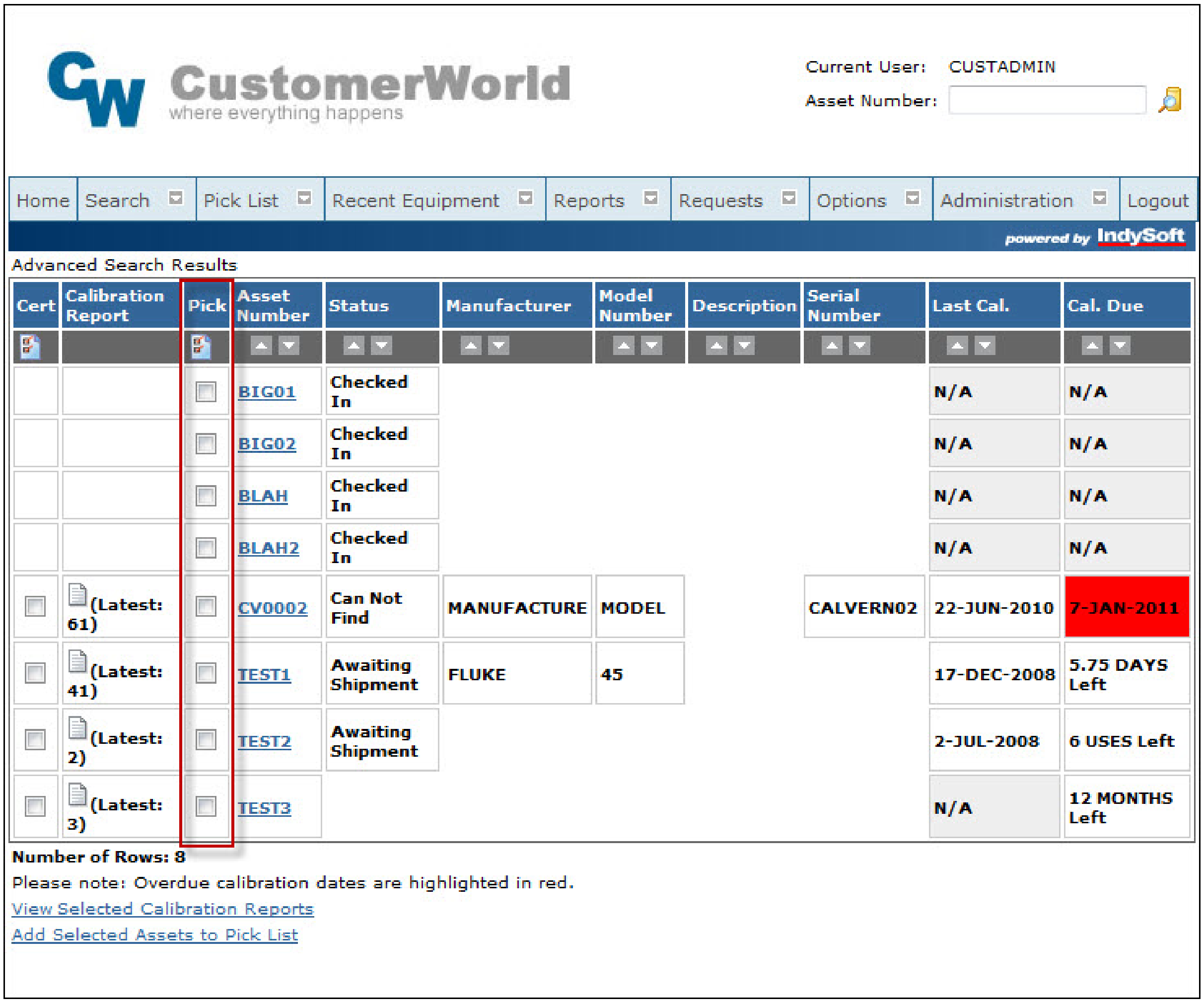
The pick list view looks much like a search results screen except it does not provide a method for viewing certs, and also adds numerous columns to define service types for service requests.



1.6.1 Adding Items to the Pick List

Pick List Creation From Search Results

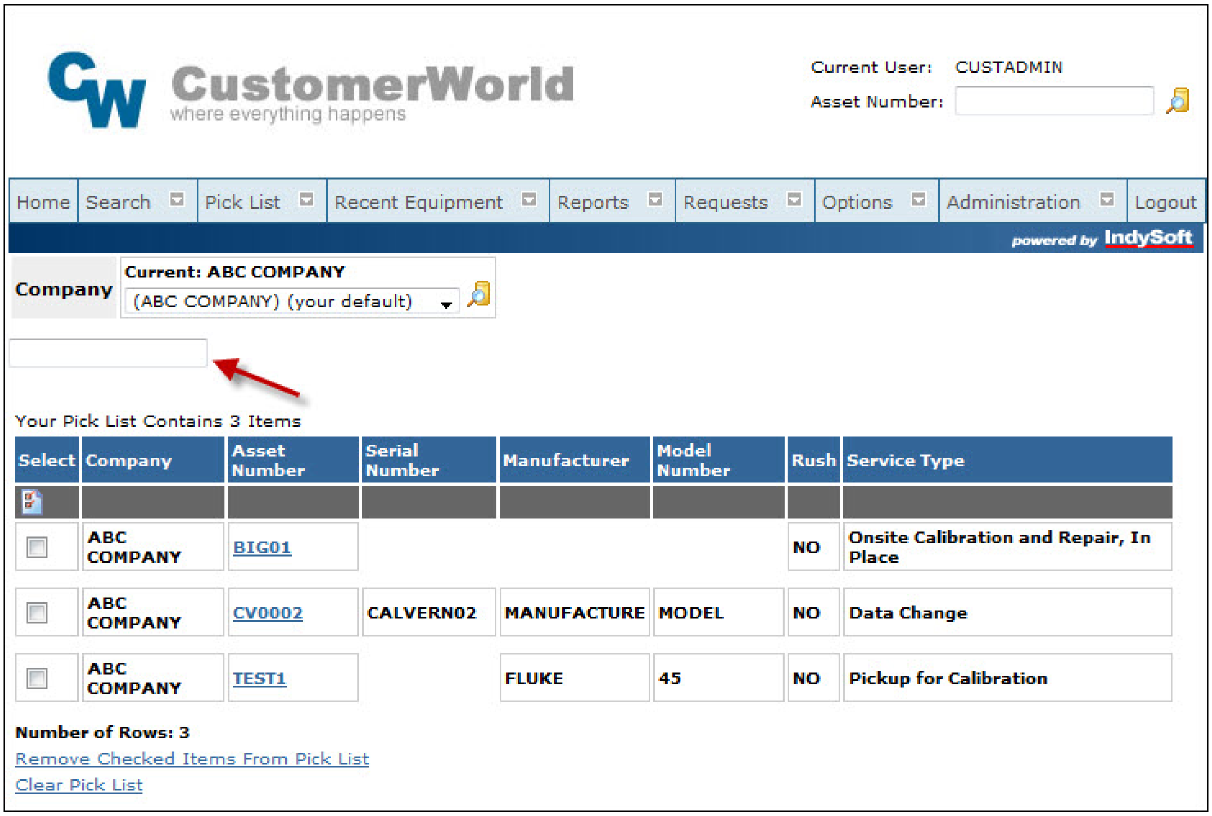
As you search for assets, you can tick the pick checkbox next to items then select the 'Add Selected Item(s) to Picklist' link at the footer of the search.



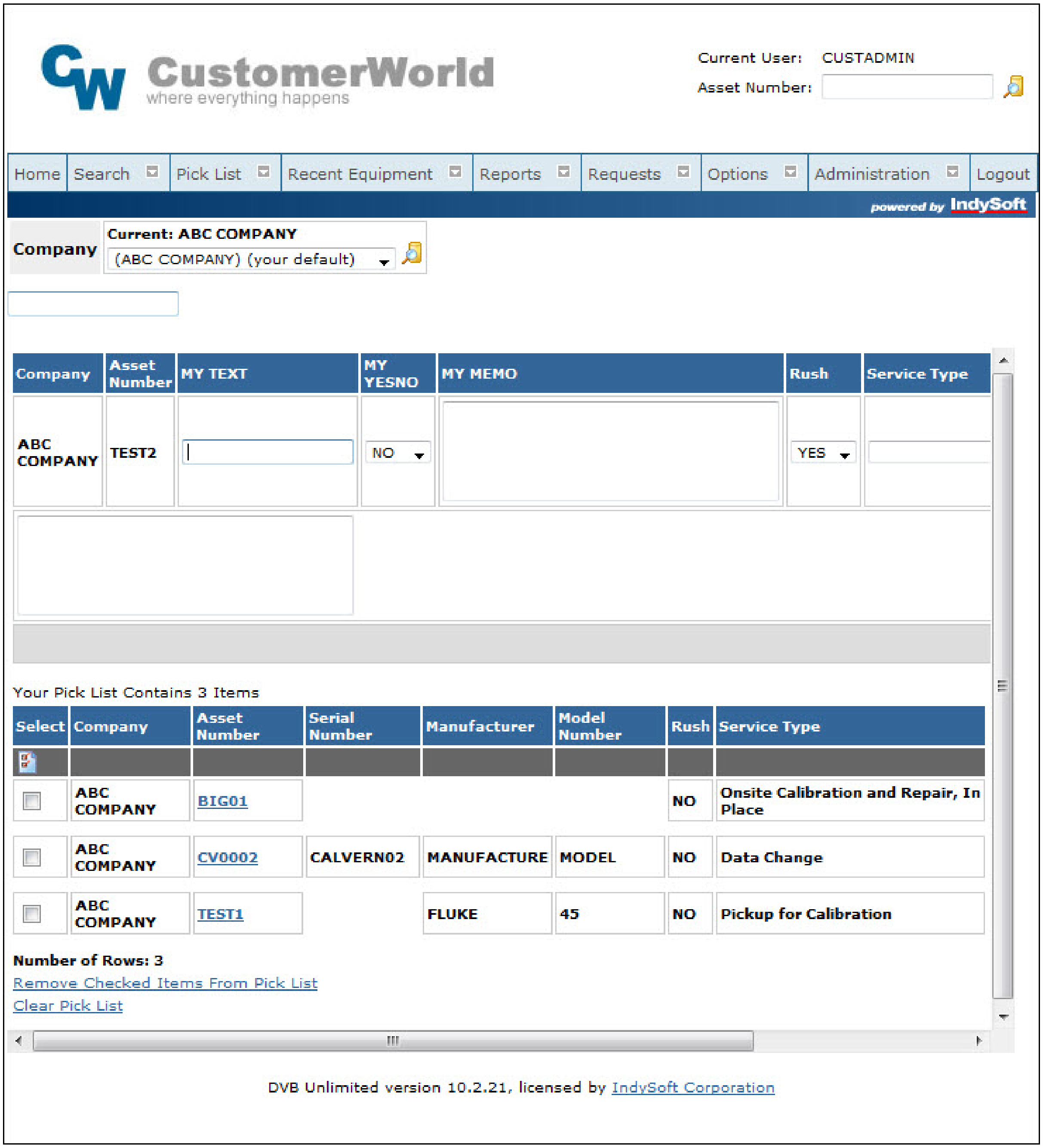
This option then places a reference to the items into your own personal 'picklist' of equipment where it can then be quickly re-referenced or even built into a service request.

Pick List Creation From Barcoding

The other way to add items to your picklist is to select Barcode Pick List from the Pick List menu. This method is intended primarily for users who want to use a barcode scanner to quickly build a list of equipment for service and is only available if it has been turned on in the User Preferences.



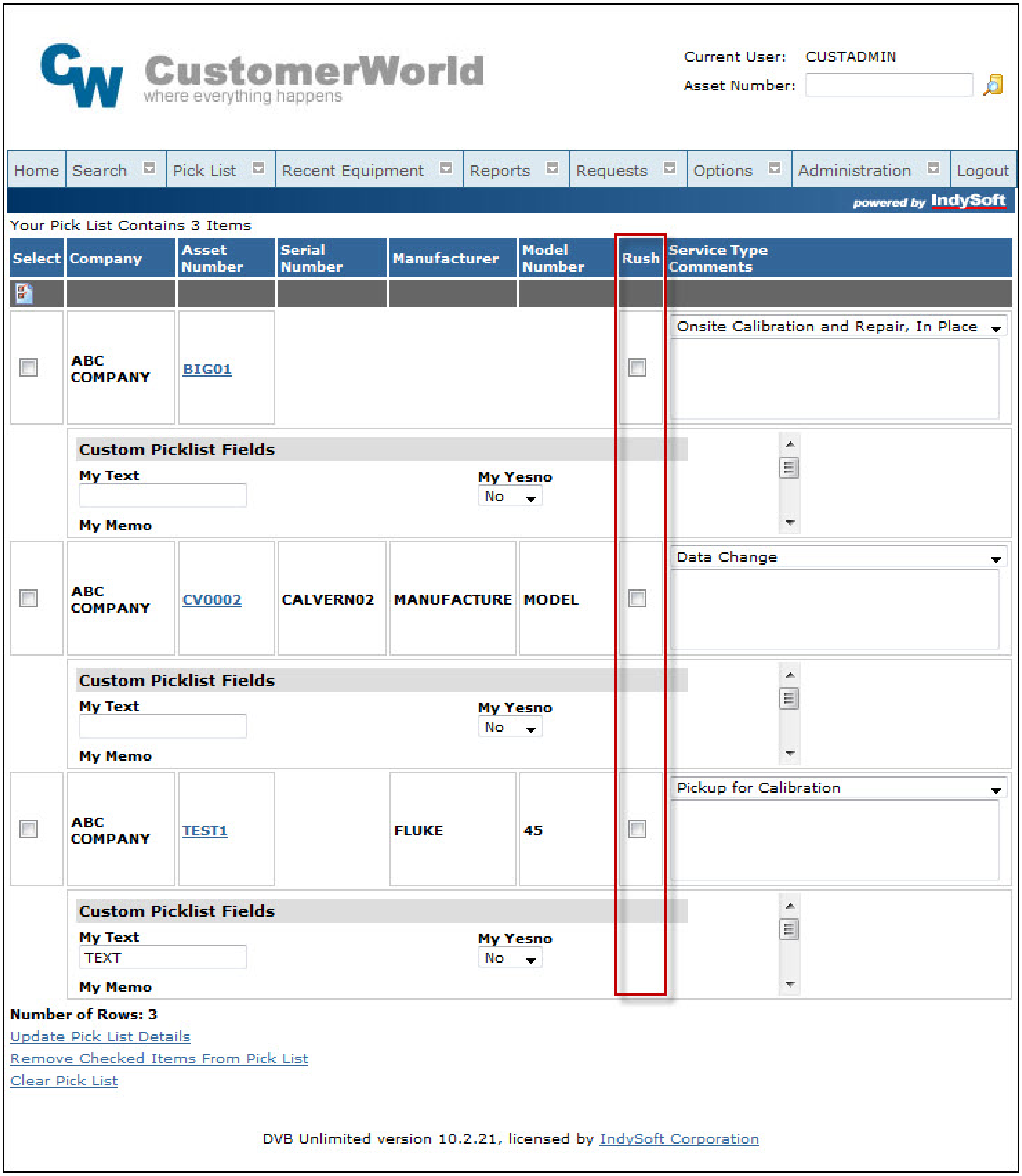
First, enter the asset number in the box. This will open a data entry window.



Using a barcode reader, you can quickly scan codes for the Pick List UDFs, Rush status, Service Type, and standard notes. To finish the entry, you must scan the Barcode termination character, to move from text fields to the next field (or finish if it's the notes field). The Barcode termination character is selected in the User Preferences and is printed as part of the Print Barcodes report. Be aware that all service type filters and requirements are enforced (see Modifying Pick List Service for more details).

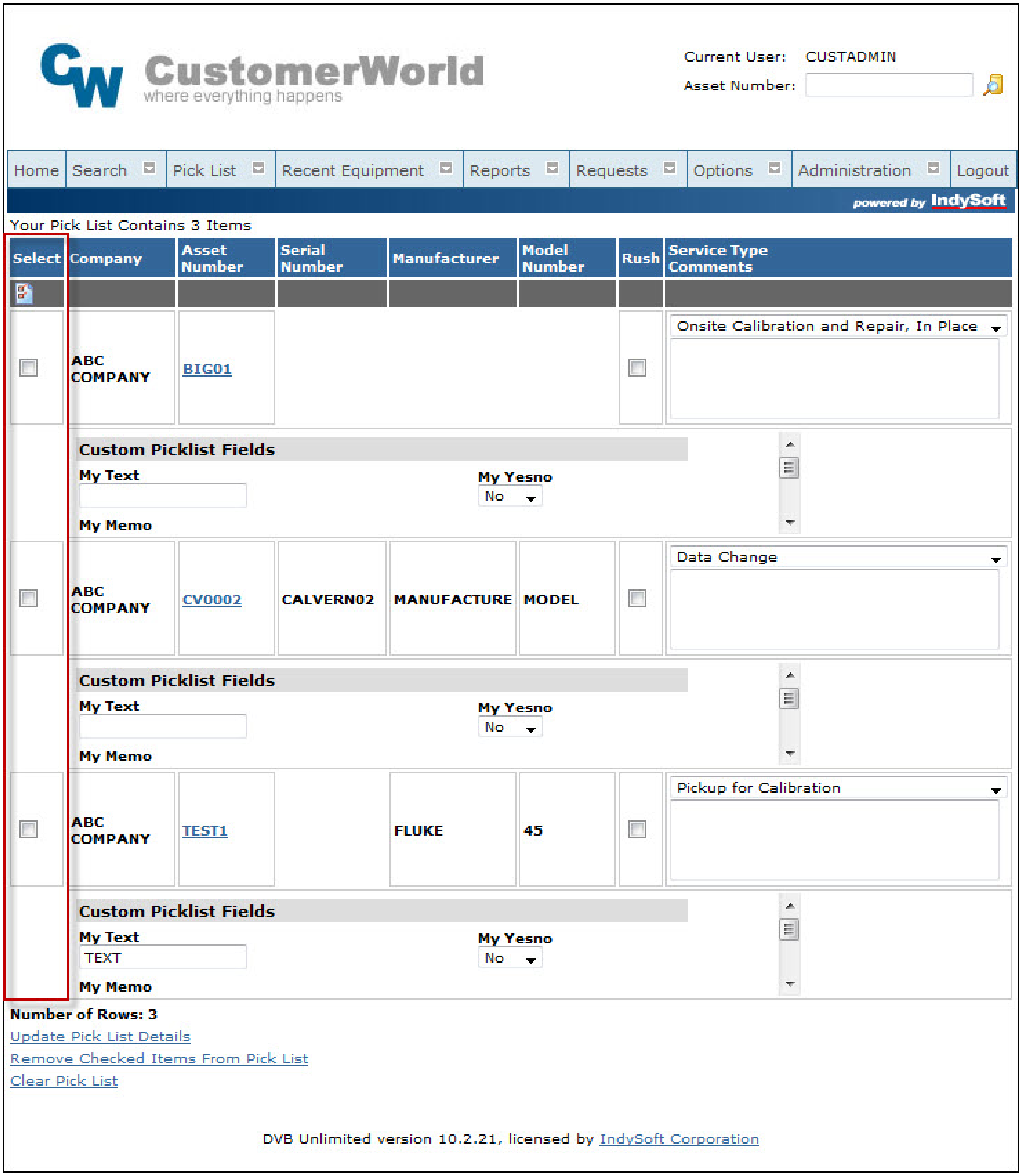
1.6.2 Modifying Pick List Service

Users simply select service rush statuses, the type of service required, enter any additional comments and then click the Update Pick List Details link to commit the changes. Depending on the service type configuration, you may be required to fill in the Comments or Pick List UDFs for a piece of equipment before you can update the pick list.



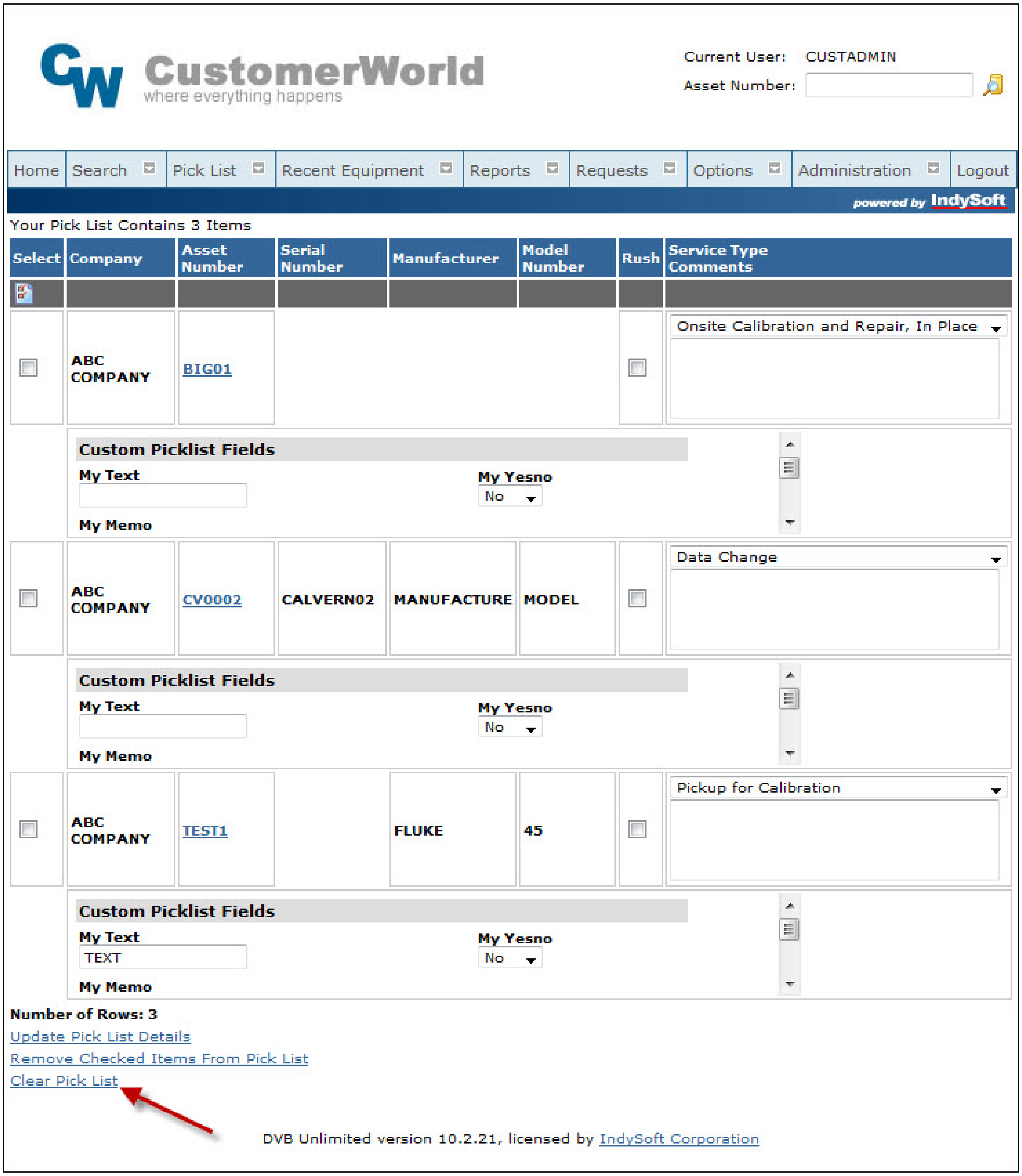
1.6.3 Deleting Pick List Items

To Remove an item from the picklist, simply select the checkbox next to the asset and click the Remove Checked Item(s) From Pick List link



1.6.4 Clearing The Pick List

Selecting the Clear Pick List link at the bottom of the Pick List view will remove all the equipment from your pick list.



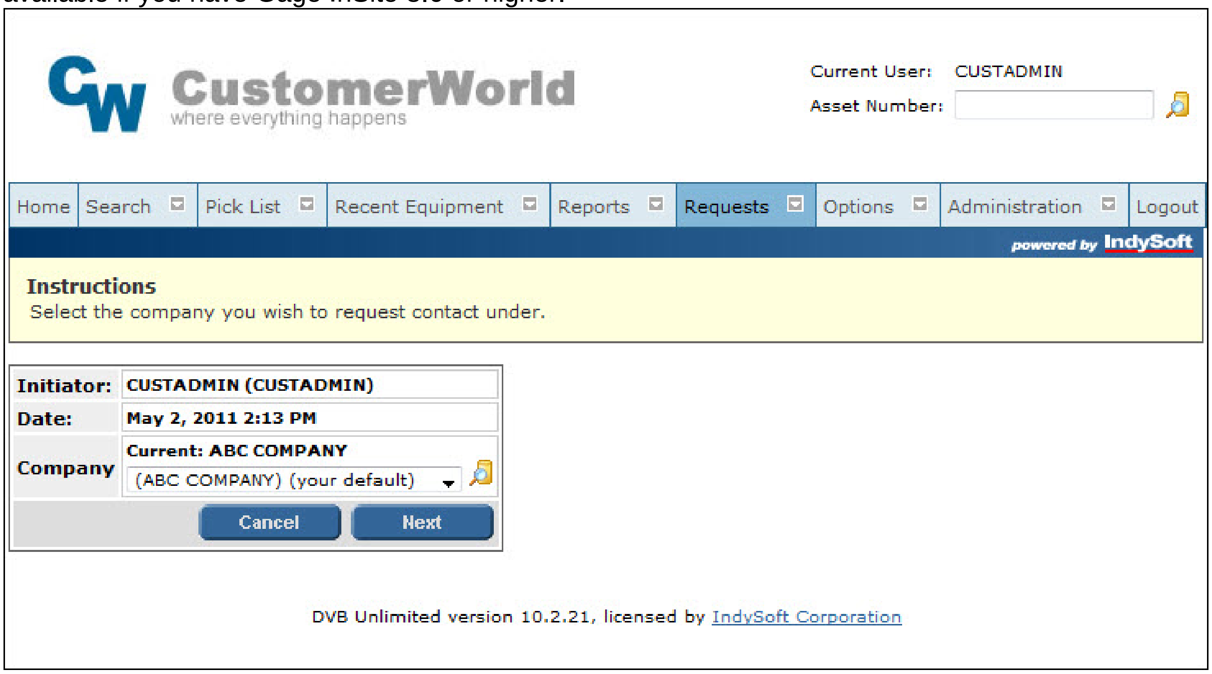
1.7 Requests

Requests, accessible from the Requests menu, allow you to submit emails to technicians for pickup, onsite, or other services. Confirmation emails are sent to the person making the request.

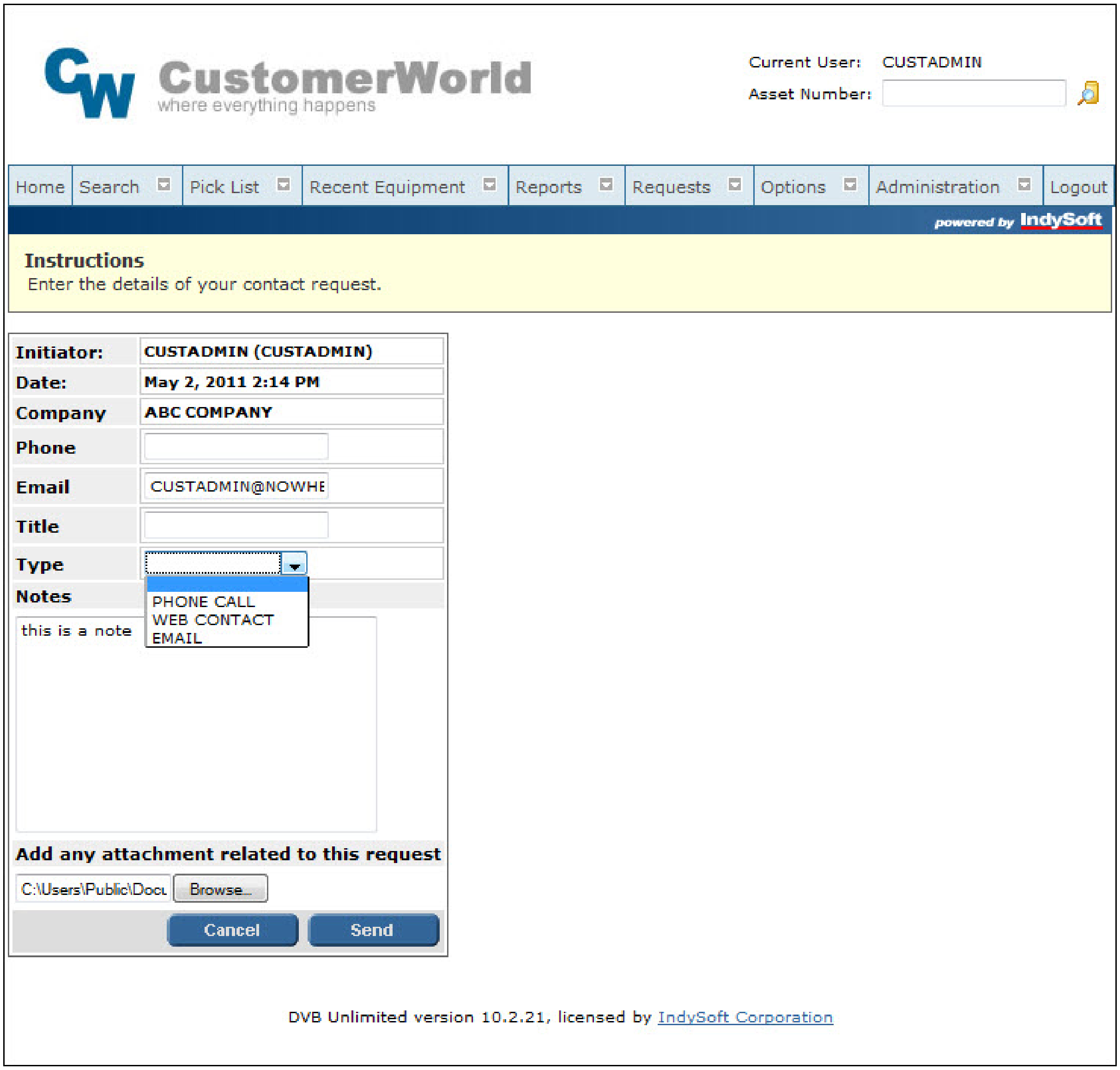
There are currently three types of service requests: Onsite, Other, and Pickup

1.7.1 Action Item

The Action Item Request is used to create a new Action Request or reply to an existing Action Request (from the Action Items Report) in Gage InSite's Action Request System. This is only available if you have Gage InSite 8.6 or higher.



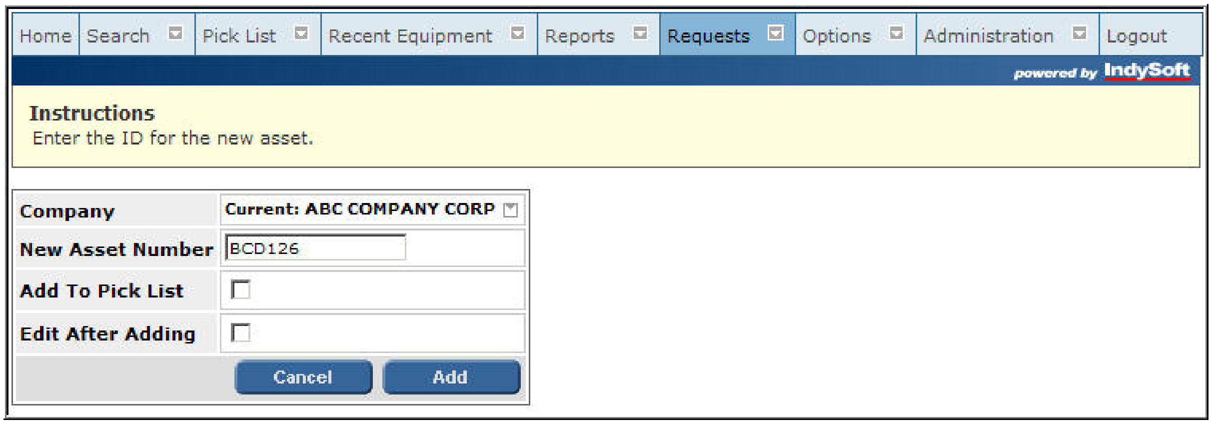
The first step only occurs if you are creating a new request. Simply indicate the company you want the request filed under.



You can then fill in the details and add an attachment as desired. DataView Browser will then log the new Action Item and send an email to the email addresses in the employee group DVB_COMP_REQ and DVB_NOTIFY. If that group does not exist, it will be sent to the email configured for Action Items in the systemwide preferences.

1.7.2 New Asset

The New Asset request is used to create a new asset in the system so users can then submit other requests on the instruments.



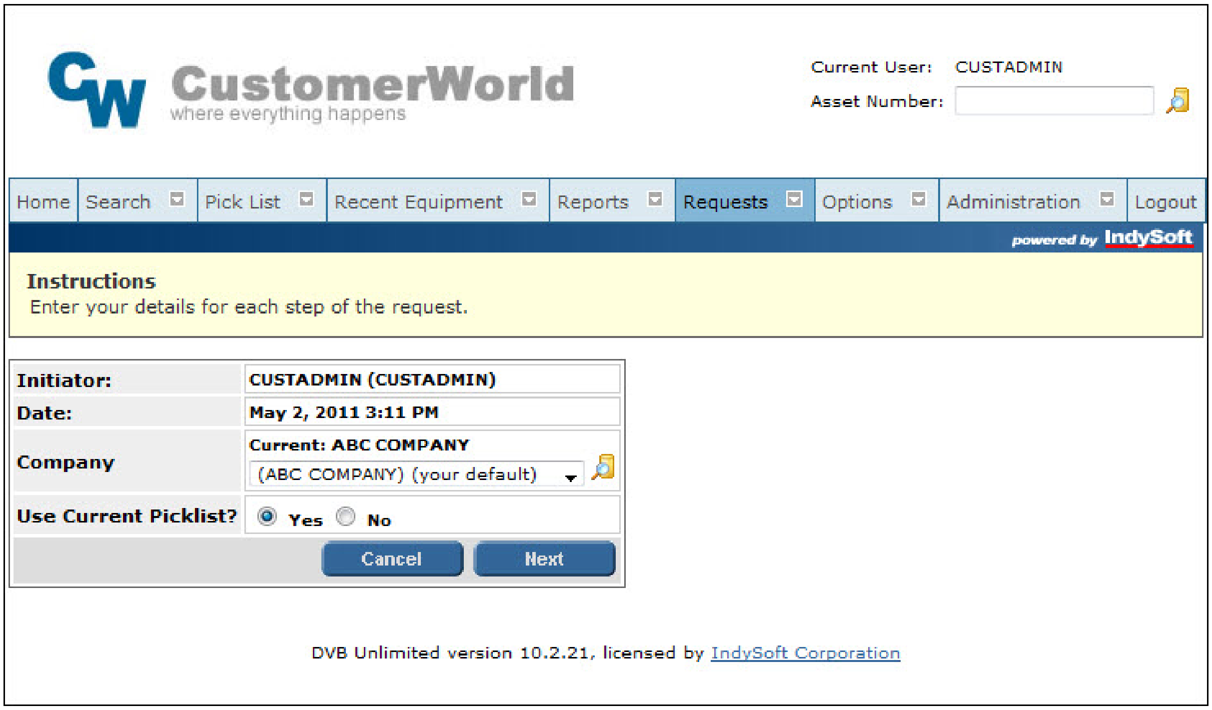
Select the Company you want to create the asset in, and the New Asset Number field will be auto-populated based on the systemwide options' prefix, suffix, and digits for new assets. The user can also opt to have the asset added to the user's pick list when it's created, and to go to the Update Asset Info screen to set any additional fields that have been made available to the user.

Click "Add" to attempt to add the Asset. If the Asset Number does not already exist, it will be created as a new Gage in the system, an email will be sent to the "Email to receive new equipment" address from systemwide options, and a confirmation message will be displayed. Otherwise, an error message will be displayed. From the confirmation message, the user can click Finish and the user will be able to either edit the asset or add a new one. The asset will also appear on the user's picklist if it was marked to be added.

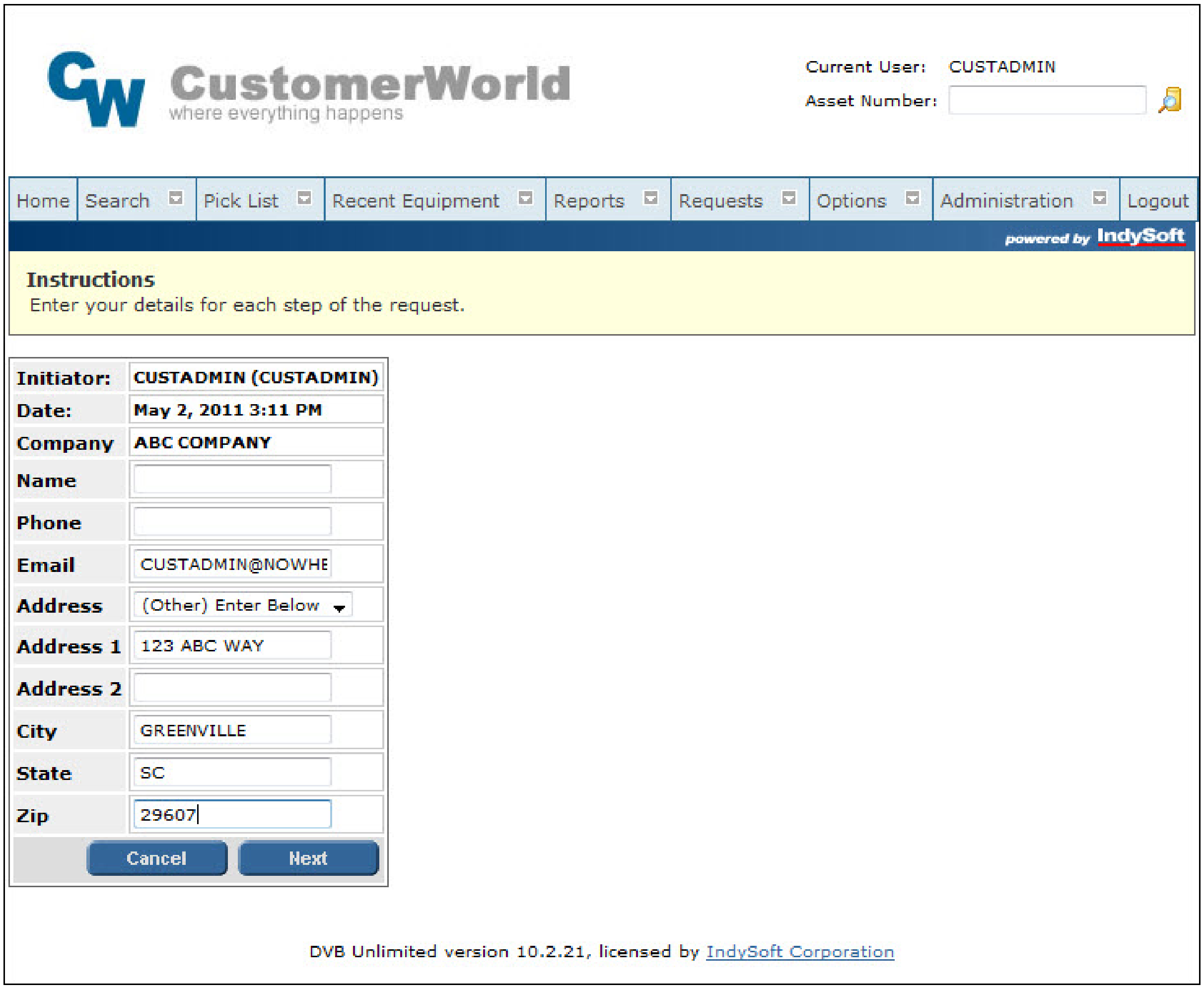
1.7.3 OnSite Service

OnSite Service requests are for situations where a technician must travel outside of the lab to service the equipment. Submission of the request can be performed through picks lists or through notes.

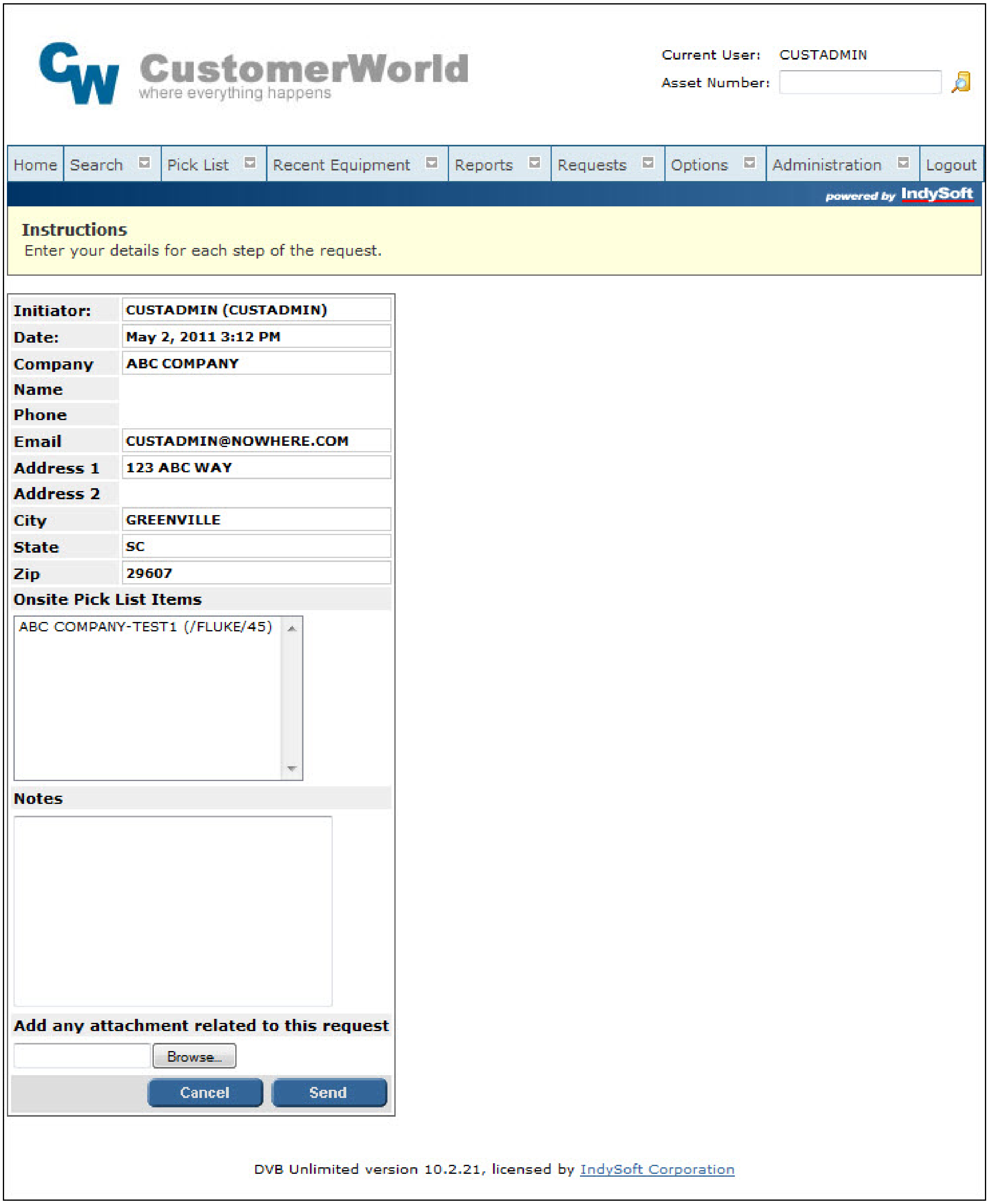
The first step in submission of a service request determines if the user wants to utilize their current picklist or not



The user then provides any related contact information for this request



Finally, a notes field allows final notation of anything related to the request, along with a copy of the picklist items that are marked for OnSite service.



Upon submission of the request, a few things occur:

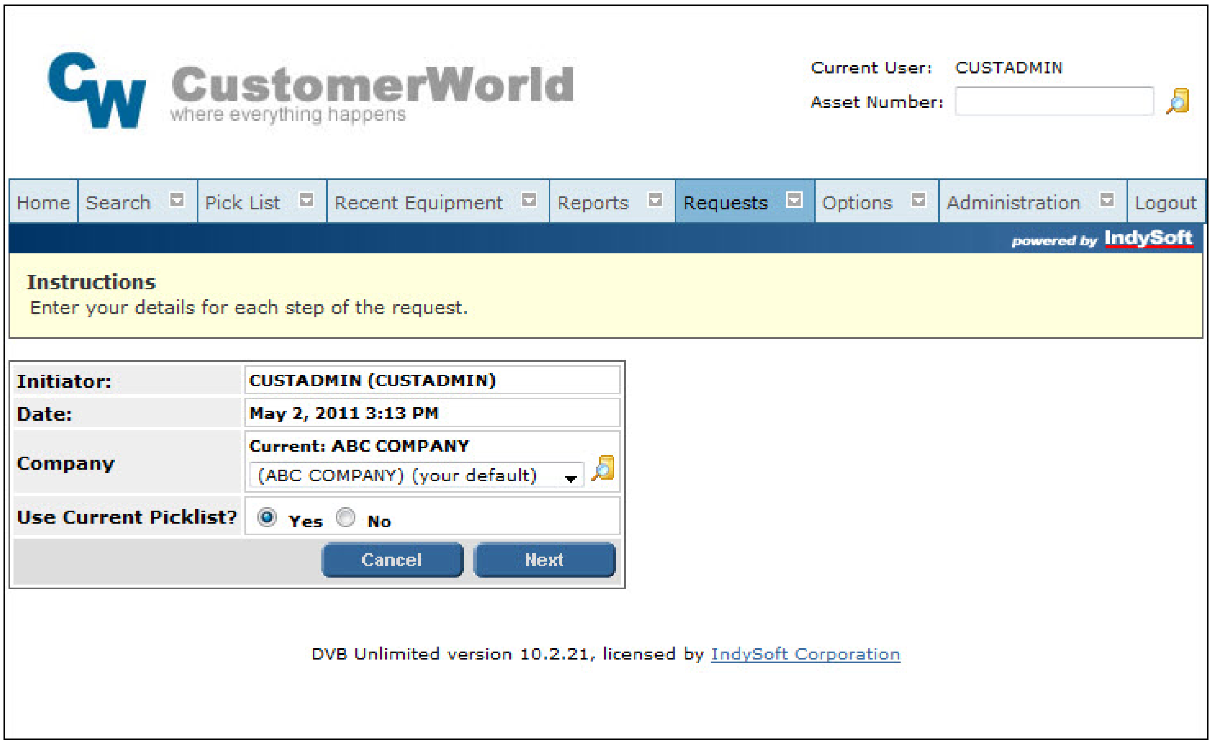
1) The picklist is cleared of items marked for OnSite service.
2) If DVB_NOTIFY is set as an employee group, the responsible employee(s) are sent notification emails for the service which includes all fields from the form and a reference to a Navigator Group which has been added to their InSite Navigator List.

3) The tracking status of the equipment will be changed to the code specified by the service type.

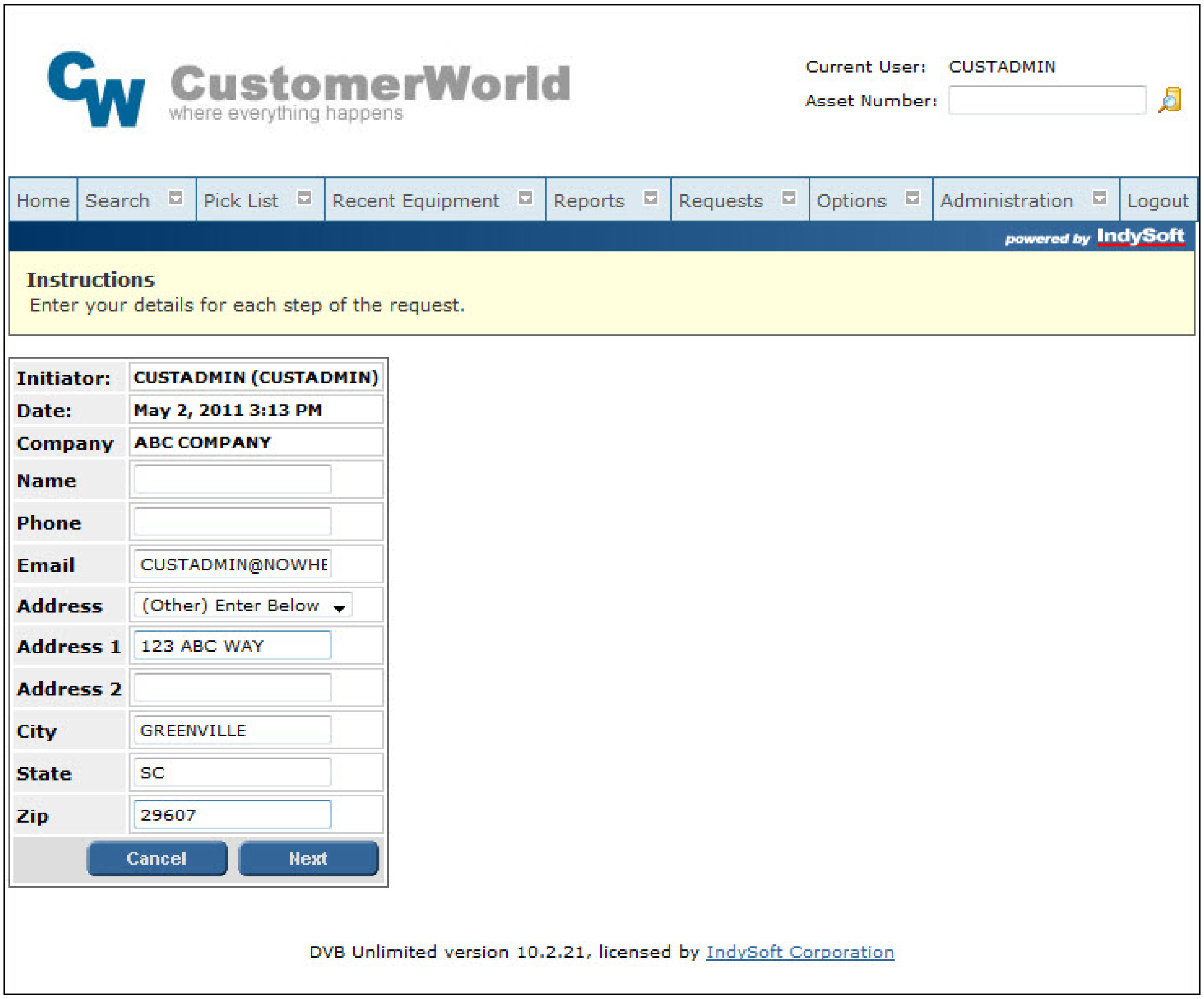
1.7.4 Pickup Request

Pickup requests are for situations where a technician must bring equipment back to the lab to provide service. Submission of the request can be performed through pick lists or through direct notes entry equipment.

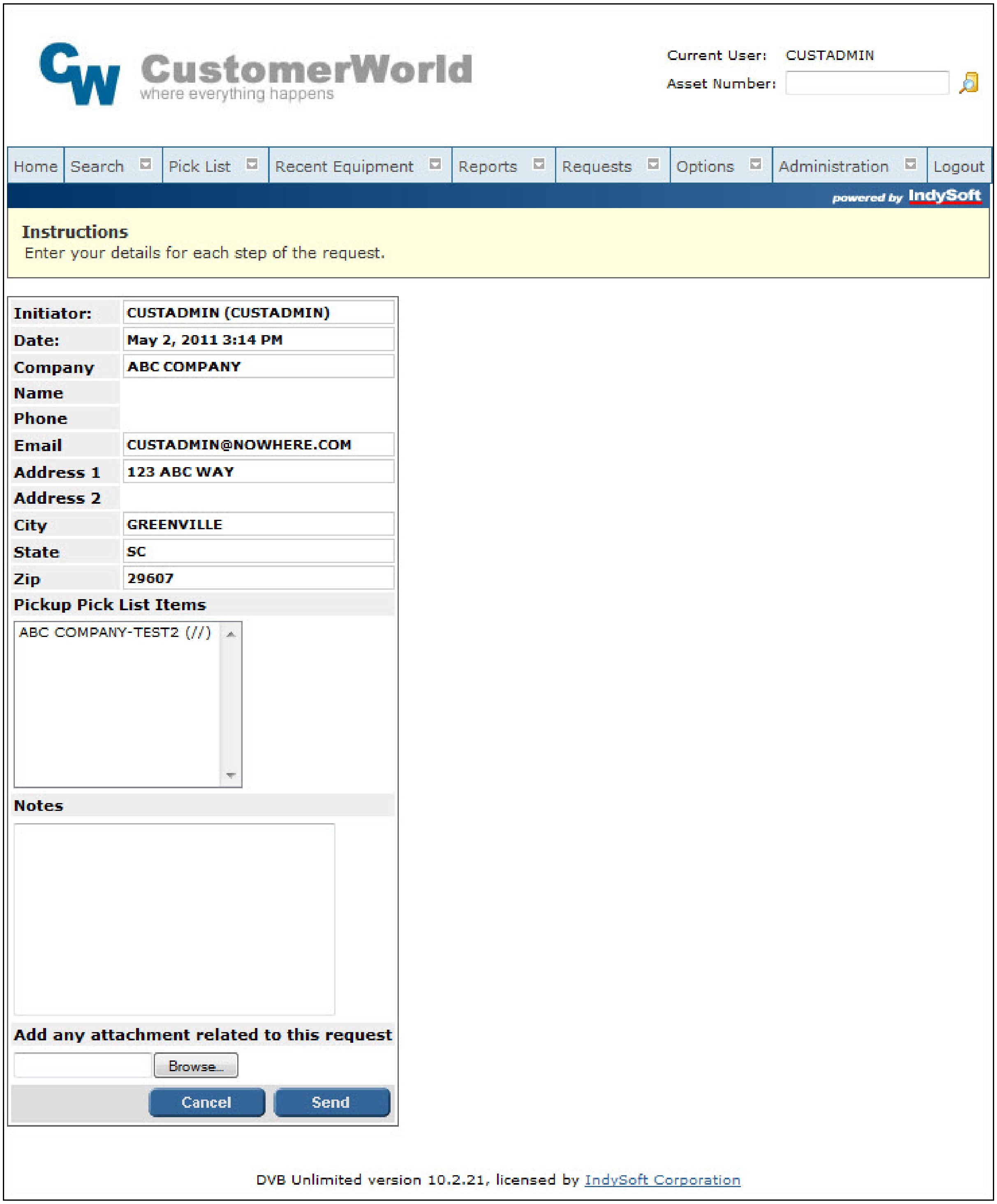
The first step in submission of a service request determines if the user wants to utilize their current picklist or not



The user then provides any related contact information for this request



Finally, a notes field allows final notation of anything related to the request, along with a copy of the picklist items marked for Pickup service.



Upon submission of the request, a few things occur:

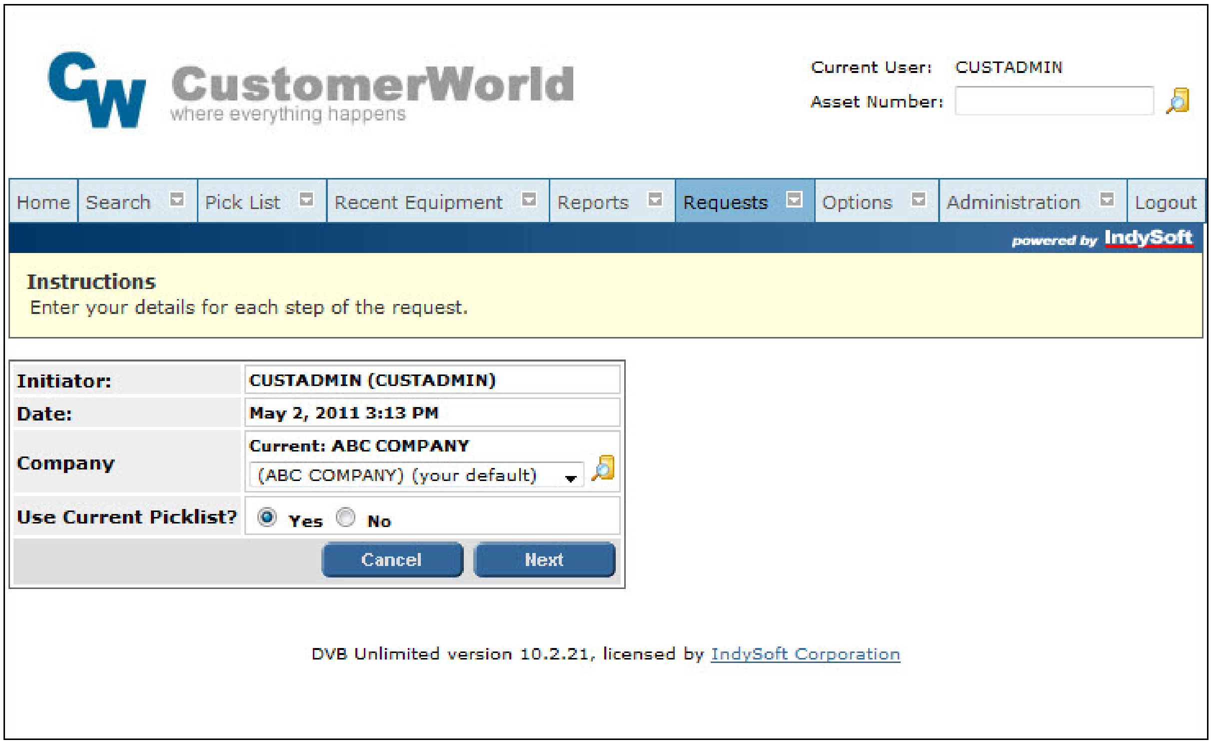
1) The picklist is cleared of items marked for Pickup service.
2) IF DVB_NOTIFY is set as an employee group, the responsible employee(s) are sent notification emails for the service which includes all fields from the form and a reference to a Navigator Group which has been added to their InSite Navigator List.
3) An email is sent to the User's email address to serve as a packing list for the pickup.

4) The tracking status of the equipment will be changed to the code specified by the service type.

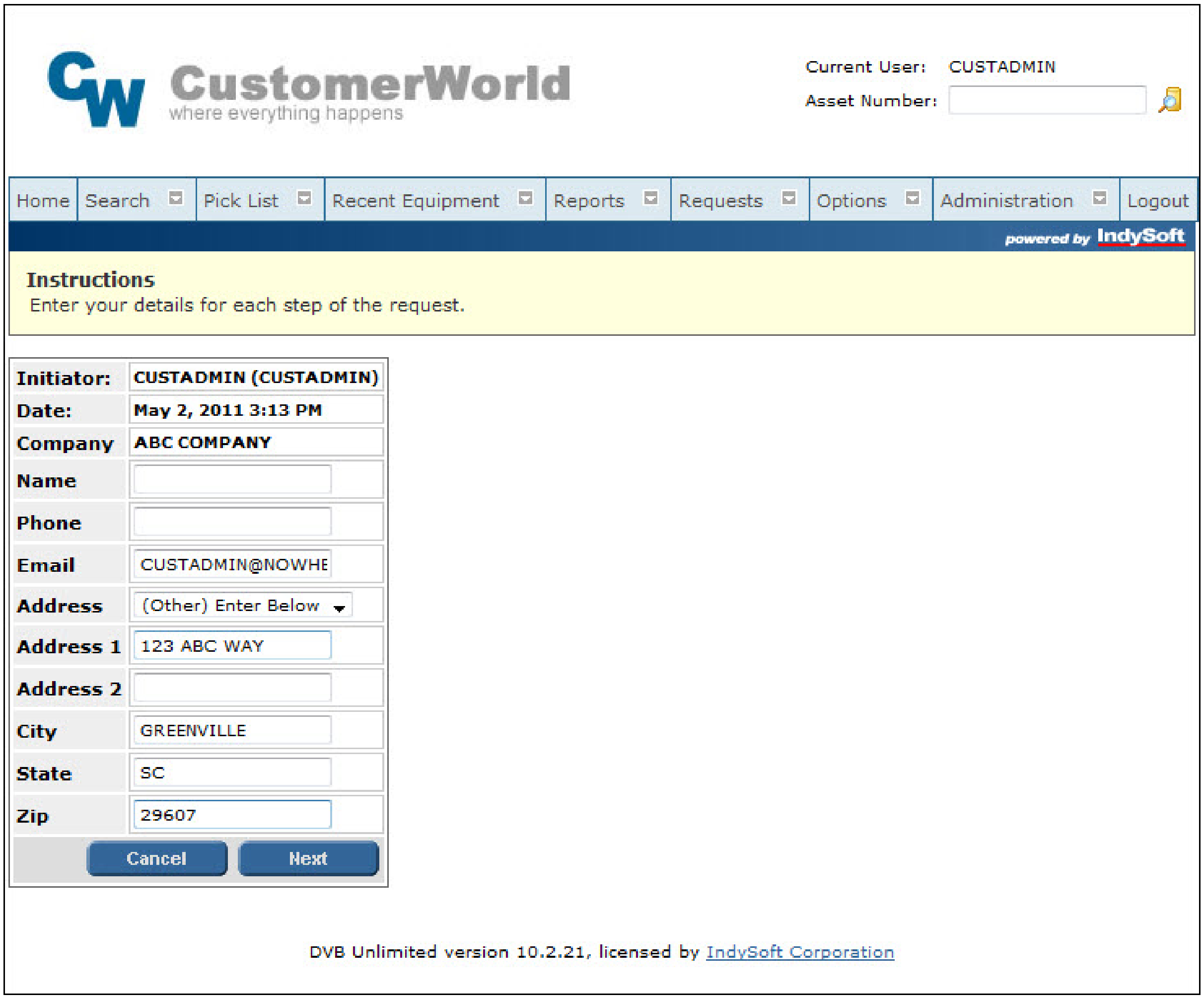
1.7.5 Other Services

Other Services requests are for situations where a services other than pickup requests or onsite service are needed. Submission of the request can be performed through pick lists or through direct notes entry equipment.

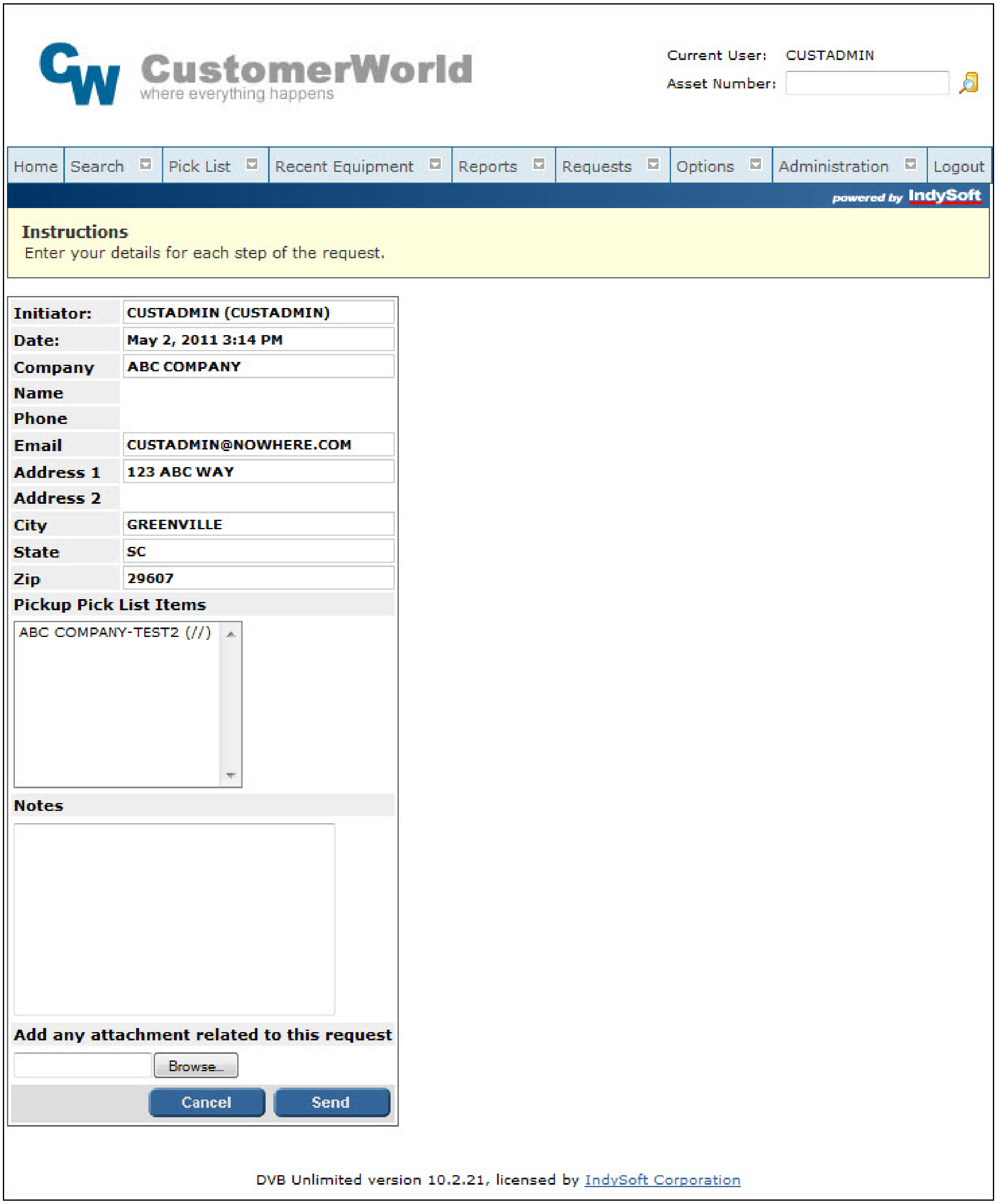
The first step in submission of a service request determines if the user wants to utilize their current picklist or not



The user then provides any related contact information for this request



Finally, a notes field allows final notation of anything related to the request, along with a copy of the picklist items marked for Data Change services.



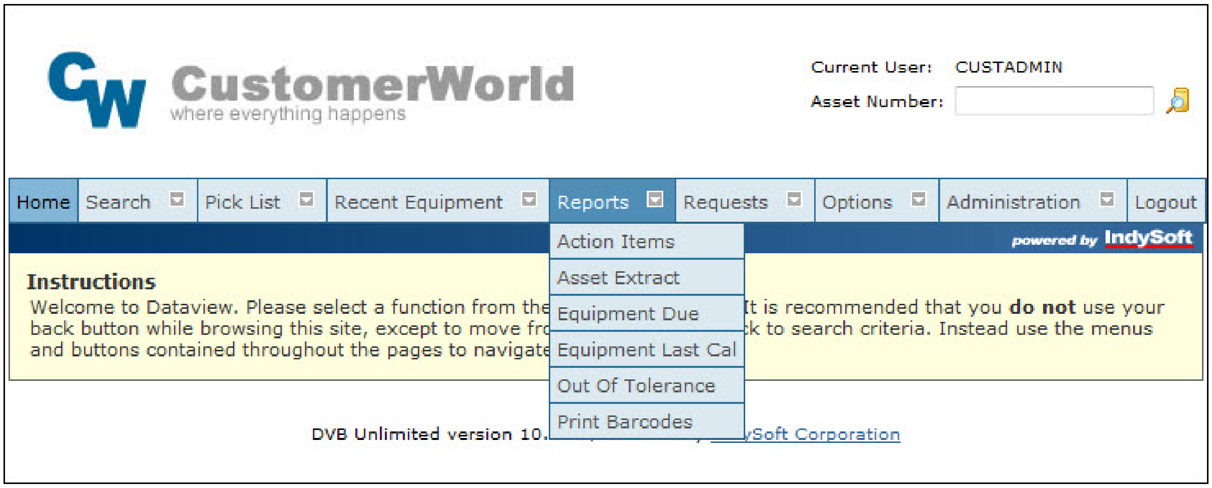
Upon submission of the request, a few things occur:

1) The picklist is cleared of items marked for Data Change services.
2) IF DVB_NOTIFY is set as an employee group, the responsible employee(s) are sent notification emails for the service which includes all fields from the form and a reference to a Navigator Group which has been added to their InSite Navigator List.
3) An email is sent to the User's email address to serve as a packing list for the pickup.

4) The tracking status of the equipment will be changed to the code specified for the service type.

1.8 Reports

Three reports are provided with DVB Unlimited that, when coupled with User Defined Fields, should provide the bulk of general requests in report data for customers.



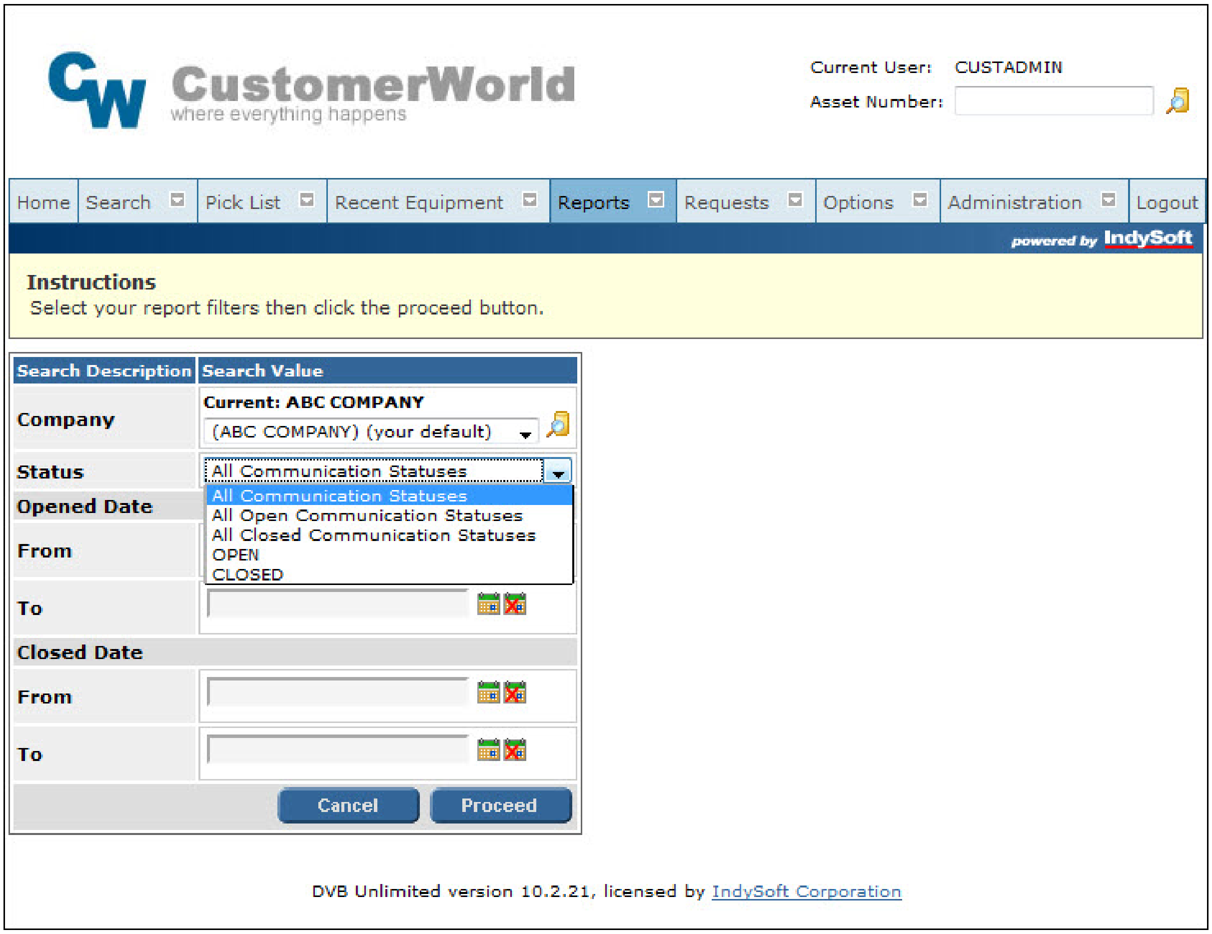
The report filters behave identically to search forms.

Results provide the key asset identifiers, calibration schedules, and all of the user defined fields for the equipment meeting the filter criteria. Output options exist for formatted HTML, unformatted HTML, Excel, or CSV. If exporting to Excel doesn't work correctly (leading zeros are sometimes trimmed), use CSV instead. It will display the data correctly.

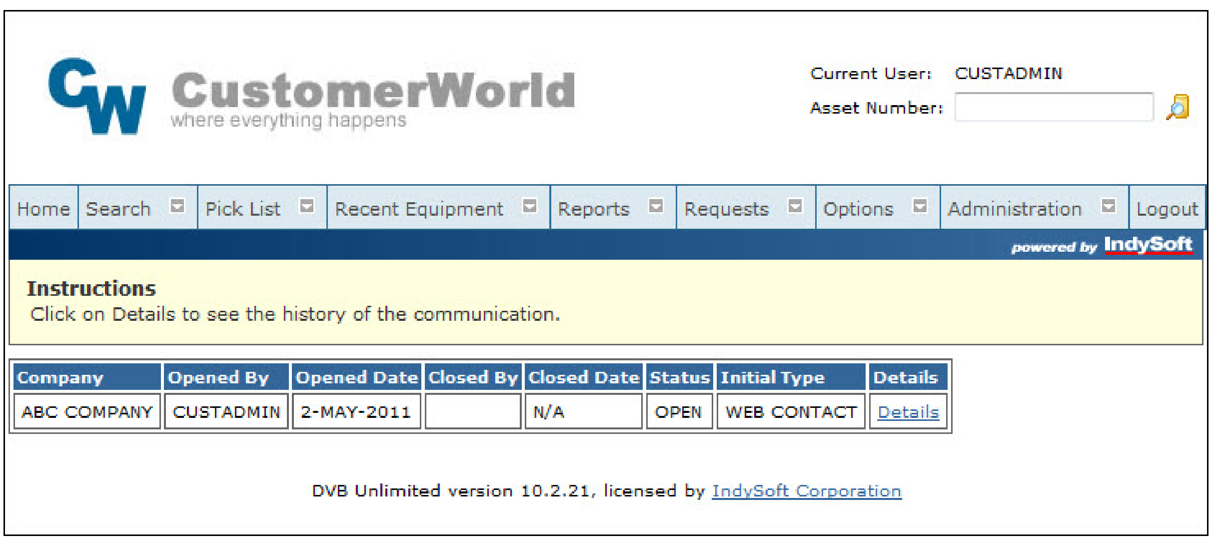
Print Barcodes is used to print barcodes related to Pick List Barcoding.

1.8.1 Action Items

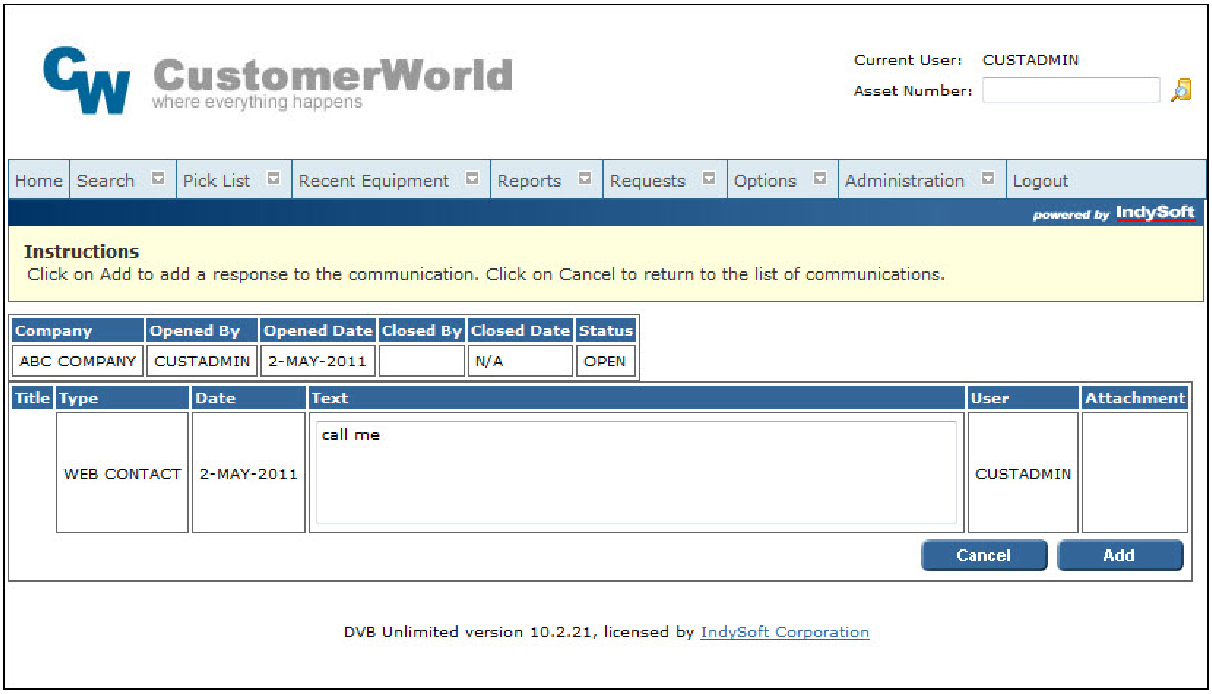
The Action Items Report is used to view Action Items in Gage InSite's Action Request System. This is only available if you have Gage InSite 8.6 or higher.



Your first step is to select what statuses you want to filter against and, optionally, a date range.



This will give you a listing of the Action Requests that exist in the system. Clicking on Details will give you more information about that Action Request.



On the details screen, you can view the history, and add a response.

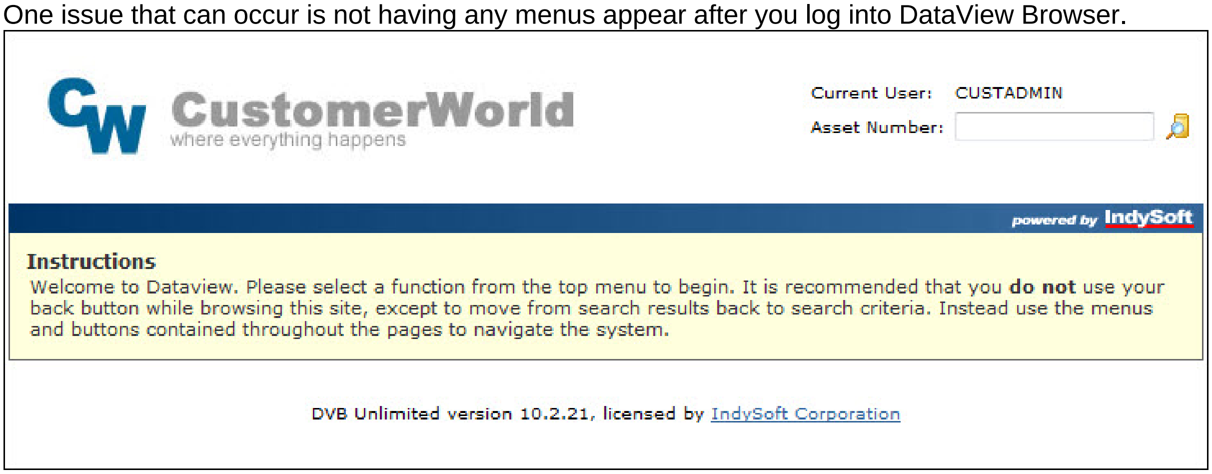
2 Troubleshooting

There are several common issues that your users may bring to your attention or that you may experience. Most of these are related to the configuration of the browser, and are not actual bugs in DataView Browser. The following pages list some of these problems and their solutions.

Note: Every browser uses slightly different rules for displaying a website and being configured. Internet Explorer uses Tools: Internet Options from it's menu. Firefox uses Tools: Options. Safari uses Safari: Preferences or Edit: Preferences. Opera uses Tools: Preferences. There are many other browsers besides these which will have their own methods for setting preferences.

2.1 There Are No Menus

One issue that can occur is not having any menus appear after you log into DataView Browser.



This issue results from having javascript disabled in the browser (usually Internet Explorer). The process of enabling javascript varies from browser to browser.

2.2 Cannot Open Excel Reports

When you run a report, it opens perfectly in HTML mode, but refuses to open in Excel format.

This is the result of downloads being blocked by the browser (usually Internet Explorer). HTML reports are not considered a download, so they open. Excel documents have to be downloaded before they can open. In Internet Explorer, setting your website as a trusted site will usually correct this problem.

2.3 Cannot Open Event Documents

Sometimes this is the result of downloads being blocked by the browser (usually Internet Explorer). PDF and other documents have to be downloaded before they can open. In Internet Explorer, setting your website as a trusted site will usually correct this problem.

Another issue that can occur is Internet Explorer's security settings may block file downloads from JavaScript by default. In that case, change your Options: User Preferences to use "Open in new window (non-popup)" instead of "Open in javascript popup" for your preferred method to open certs and documents.

2.4 Cannot Change Company

This can happen if you type a search for a company and do not enter the minimum number of characters. This is caused by disabling certain scripting functionality (such as creating a pop-up window with an error message) which causes all further javascript on the page to "hang". The effect is similar to when a program is marked as "not responding".

2.5 Cannot Open Certs Over Secure Connection in IE

To correct this issue, open Internet Options and select the Advanced tab. Under the Security group, uncheck "Do not save encrypted pages to disk".