SDMS Logilab

USER MANUAL

Logilab SDMS Version v6.5_20211025_01

Agaram
TECHNOLOGIES

CONTENTS

TABLE OF FIGURES

1 Preface

This guide provides instructions about configuring and using Logilab SDMS.

This preface contains these topics:

- Audience
- Documentation Accessibility
- Conventions

1.1 Audience

Logilab SDMS Web user manual is intended for administrators or anyone using Logilab SDMS Web application.

To use this document, you need the following:

- Prerequisites mentioned in the Logilab SDMS Web Installation Guide installed and tested on your computer.
- Administrative privileges on the computer.
- Knowledge about the following concepts:
  - Domain Name System (DNS)
  - Firewalls
  - Public and private networks
  - Connected applications
  - Internet Information Server (IIS)
  - File Transfer Protocol (FTP)

1.2 Documentation Accessibility

Logilab SDMS Web documentation set consists of the following:

- Logilab SDMS Web Installation Guide
- Logilab SDMS Web User Manual / Online Help System

1.3 Conventions

The following text conventions are used in this document:

1.3.1 Commands

When a command is referred to in the manual, the following distinctions have been made:

When menu commands are referred to, the manual will refer you to the menu bar – E.g. "Choose File from the menu bar and then Print".

When dialog box options are referred to, the following style has been used for the text – "In the **Page Range** section of the Print dialog, click the **Current Page** option"

Dialog box buttons are shaded and boxed – "Click OK to close the Print dialog and launch the print."

1.3.2 Keyboard

Keys are referred to throughout the manual in the following way:

[ENTER] – denotes the return or enter key, [DELETE] – denotes the Delete key and so on.

Where a command requires two keys to be pressed, the manual displays this as follows:

[CTRL][P] – this means press the letter "p" while holding down the Control key.

1.3.3 Notes

Within each section, any items that need further explanation or extra attention devoted to them are denoted by shading. For example:

> ***Note:*** *"SDMS will not let you close a screen or window that you haven't already saved changes to without prompting you to save."*

1.3.4 Warning

Within each section, any items that need warning or extra attention devoted to them are denoted by shading in yellow. For example:

> ***Warning! :*** *If you click* ***Close*** *before saving will close the FTP Configuration screen without saving the configuration.*

1.3.5 Callout

Callouts are used to denote an action or describe something in the interface.

Click here

1.3.6 Description

This style denotes the sequence that follows an action. In general, a screen shot appears under the style that denotes the result of an action. For Example: The Add User screen appears as shown in the figure.

1.3.7 Hyperlink

Clicking on hyperlinks will help the user to go to the topic directly in the same document.

Example: [Click here to see how to setup FTP site](#).

1.3.8 List of Common Controls in SDMS

The description of common controls in SDMS is listed below:

Button Name	Image	Description
Submit		Will submit the entries given by the user to perform certain task.
Add		Enables add new records to the masters.

Edit	Edit	Enables edit the selected record in the master / form
Active / Deactive	Active/De-Active	Enables activate / deactivate user / instruments
Retire	Retire	Will retire the selected user/record/instrument permanently
Filter	Filter	Enables the user to search for files/records/details based on specified search criteria
Reset	Reset	Will clear the entries in the current form for fresh entry
Open	Open	Will open the selected file / folder
Save	Save	Saves the details entered in the form.
Refresh	Refresh	Will refresh the screen
File Upload	File Upload	Enables upload files manually
Folder Upload	Folder Upload	Enables upload folders manually
Print	Print	Will print the current form/master/report
Export	Export	Will export the current form/master/report to Excel
Mandatory Fields	*	All fields marked with a * are mandatory and must be filled to avoid error messages.

2 Getting Started

2.1 First Time Login

1. Open browser, in the address bar type " http://agl89:8080/LogilabSDMS/Login.html" and then press ENTER.

First time when you log in to the SDMS Web application, You must create password in the first login. The Logilab SDMS login screen appears as shown in the figure:

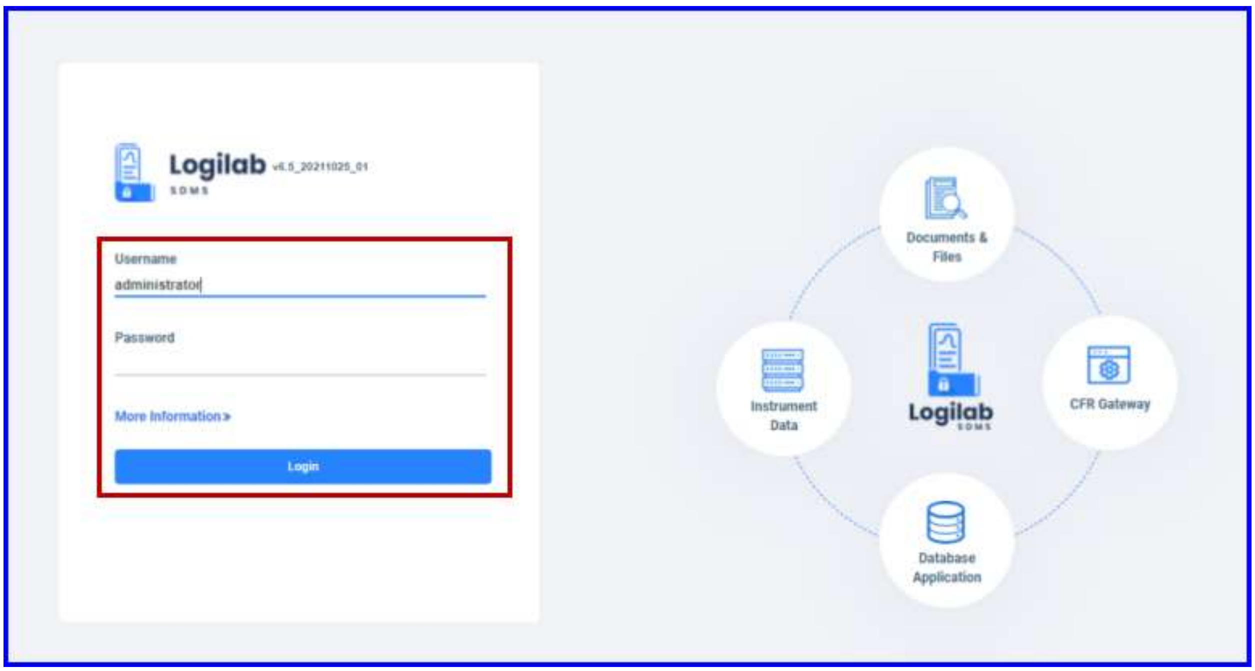


FIGURE: 1 - First Time Login Screen

2. In the **Username** box, type "Administrator" / user name received from your administrator.

3. When you move cursor to the **Password** box, the **Change Password** screen appears as shown in the figure:

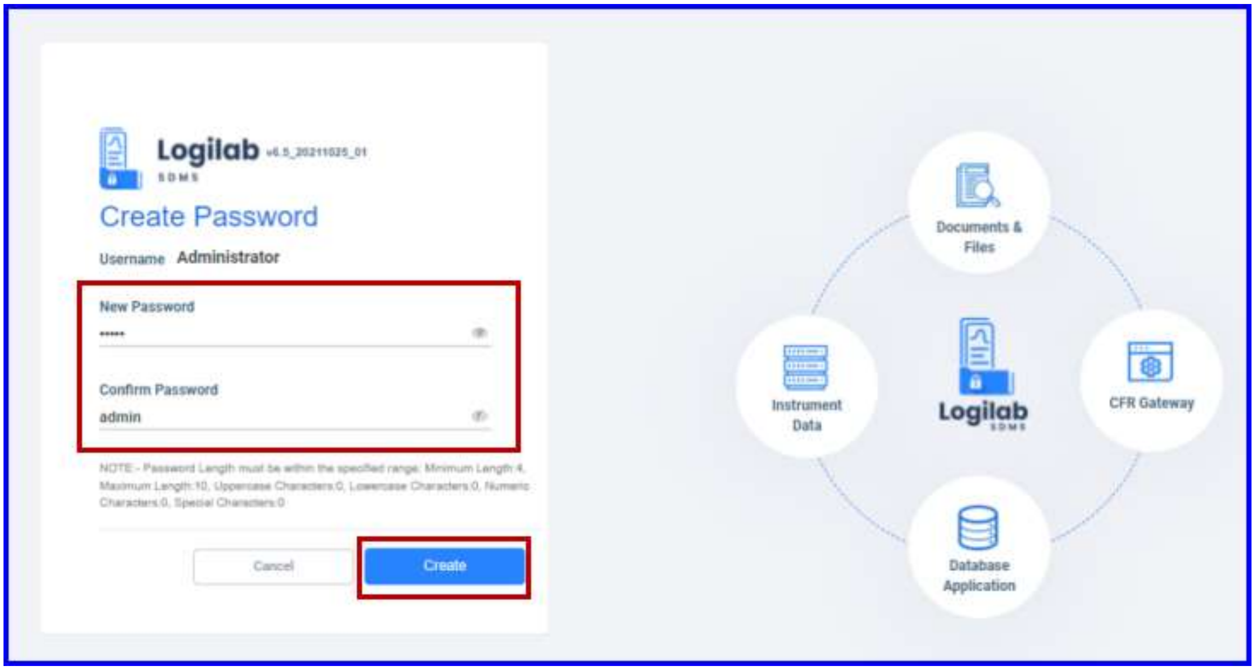


FIGURE: 1a - First Time Login – Create Password Screen

4. In the **New Password** and **Confirm Password** boxes, type/create your password. Stick to the password policy note while creating password as shown in the above figure.
5. If required, click the icon to view the password as you type the password in the **New Password** and **Confirm Password** fields.
6. Click **Create**.
7. Log in as administrator with new password created.

2.2 Login

To login to Logilab SDMS, follow these steps:

1. Open browser, in the address bar type " http://agl89:8080/LogilabSDMS/Login.html" and then press ENTER.

The Logilab SDMS login screen appears as shown in the figure:

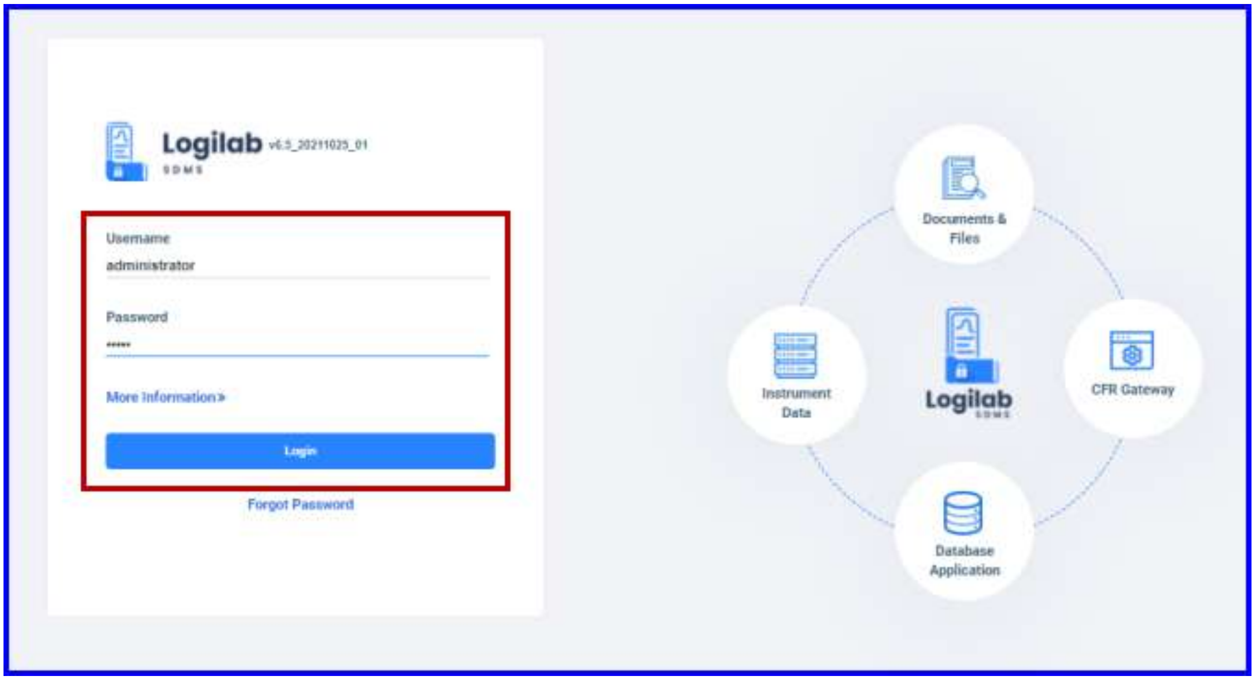


FIGURE: 2 - Logilab SDMS Login Screen

2. In the **Username** field, type the login id that you received from your administrator.
3. In the **Password** field, type valid password.
4. Click **Login**. On successful login, the SDMS main screen appears.
5. Click **More Information** to view the following details:
   - **Site**
   - **Domain**
   - **Time Zone**
   - **Language**

For the above fields, the default set values will be loaded. However, you can change these values if required. The More Information section appears as shown in the figure:

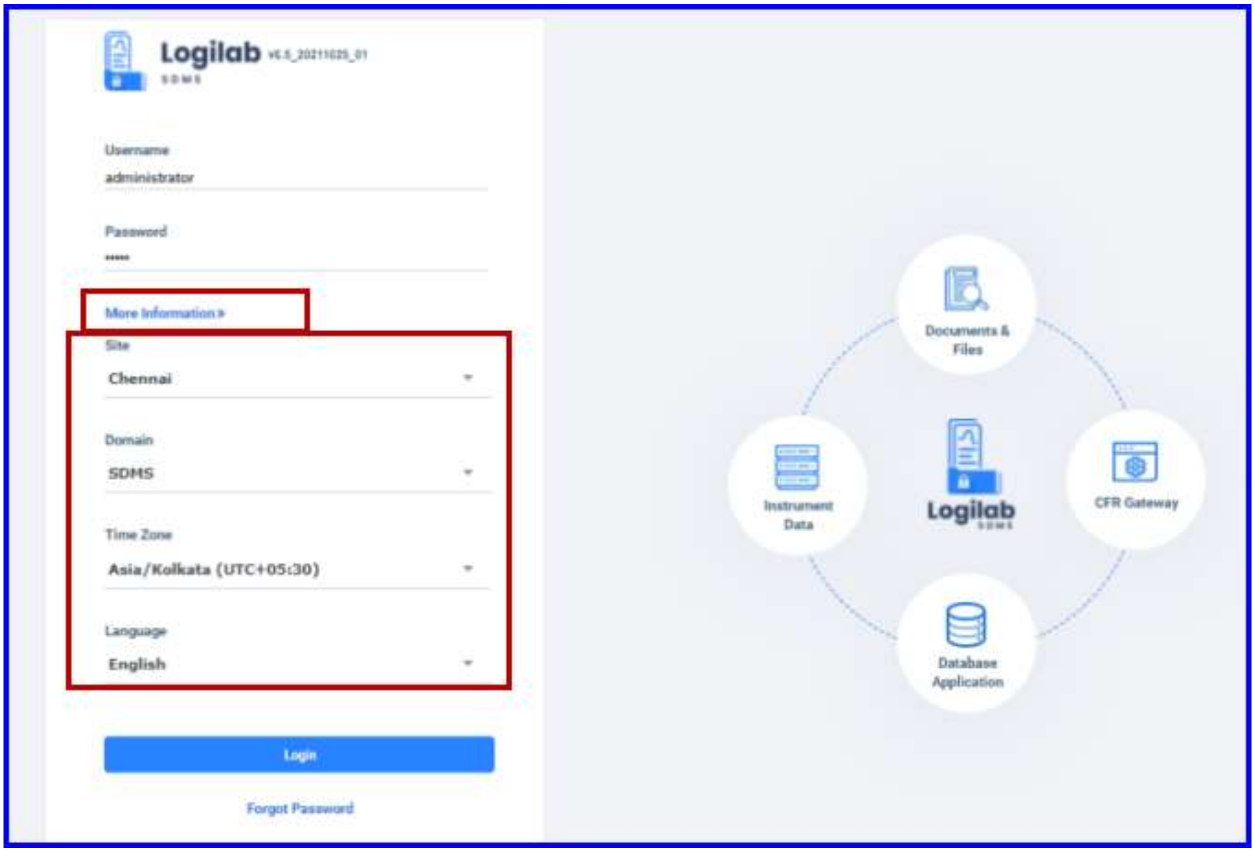


FIGURE: 2a - Logilab SDMS Login Screen – More Information Section

2.3 Understanding SDMS User Interface

On successful login, SDMS main screen appears as shown in the figure:

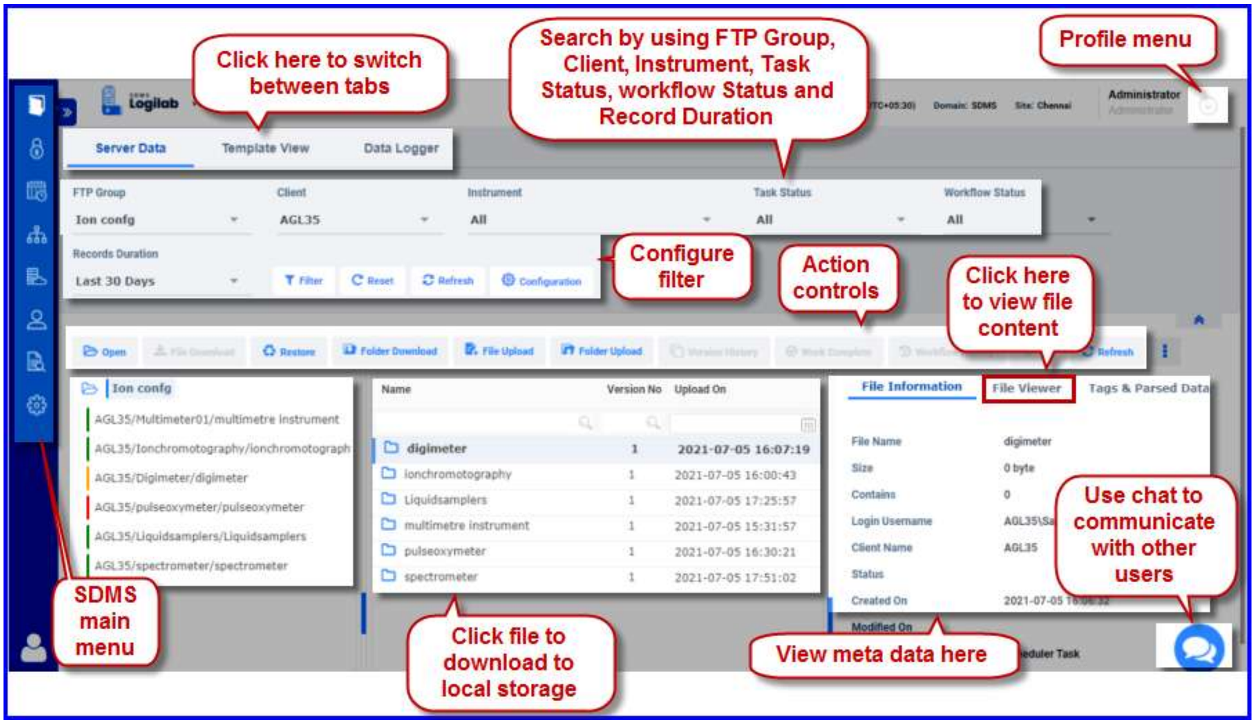


FIGURE: 3 - SDMS Main Screen

File Viewer: Click **File Viewer** to view content of the selected file. You can view .txt, .pdf, image, video and audio files. If you try to view file information of an EXCEL file, the file will be downloaded to the local computer.

2.4 SDMS Main Menu

SDMS main menu appears as shown in the figure:

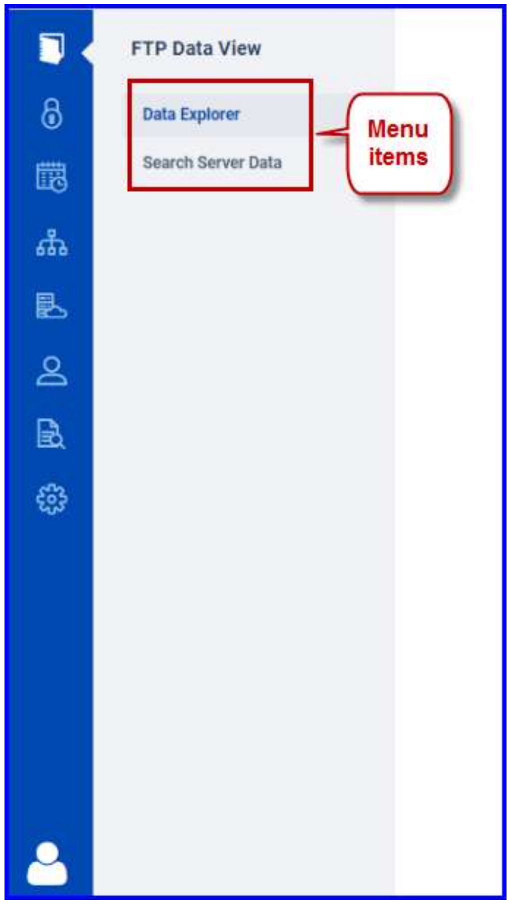


FIGURE: 4 - SDMS Main Menu

You can expand and collapse the main menu for your convenience. Click to expand and click to collapse the main menu.

Logilab SDMS main menu consists the following:

FTP Data View: Enables you to search files in the server based on selected criteria. Also helps to view files uploaded using templates and the tags mapped.

Lock Settings: Helps to lock instruments for file upload based on the set parameters in the template.

Scheduler: Helps you schedule file upload and schedule local and server file deletion.

Master: Enables create and manage basic masters in SDMS. Enables create and manage templates, tags and tag values.

FTP: Enables set up FTP sites/repositories, configure FTP locations, client and server machines for file upload.

User Management: Helps to create and manage user accounts, Group users, define access to user and groups.

Log History: Audit Trial: Enables you set up audit trail options in Logilab SDMS and view audit trail log. Also helps to view and manage serve and local file delete logs, upload logs, download logs and restore logs.

Settings: Helps to set preferences like email options, ideal timeout and scheduler rights screen.

2.5 SDMS Chat

SDMS Chat helps you to chat with the other users in the SDMS.

On the SDMS screen double-click . The chat screen appears as shown in the figure:

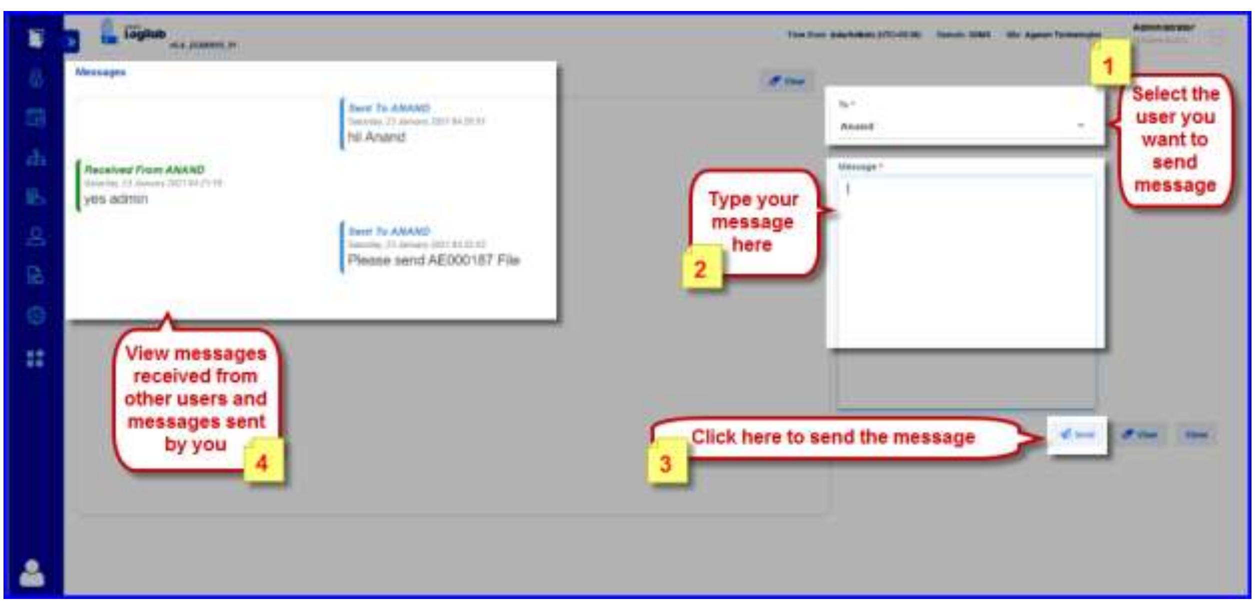


FIGURE: 5 - SDMS Chat Screen

2.6 Profile Menu

The Profile menu enables you to change profile setting, password, access help and screen lock option. The user drop down menu appears as shown in the figure:

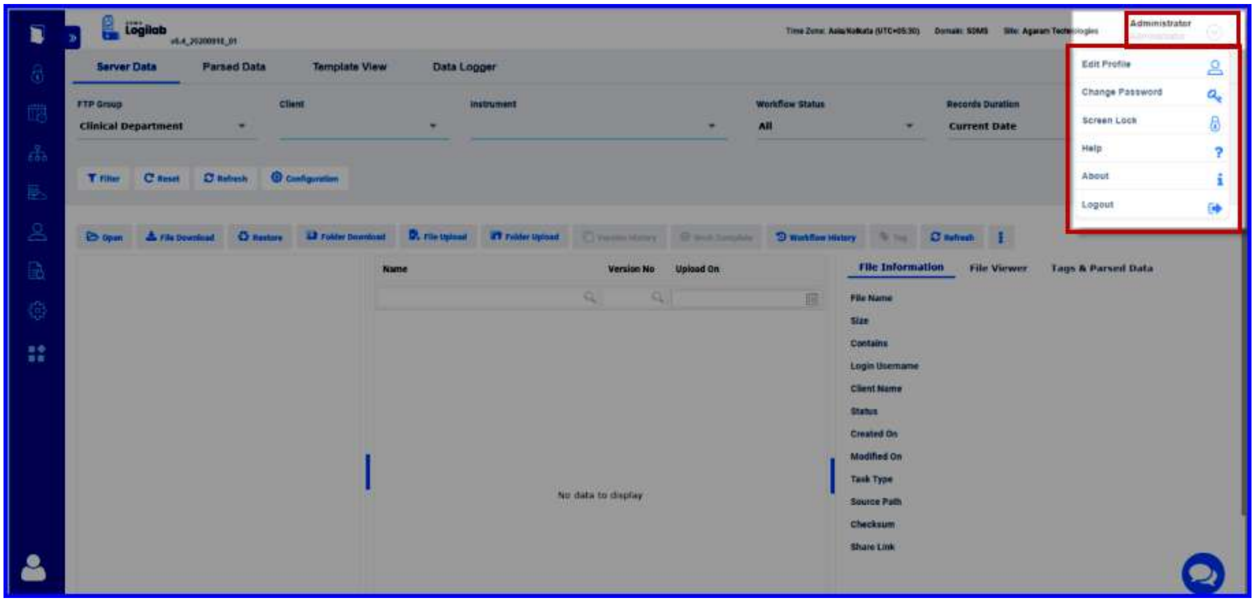


FIGURE: 6 - Profile Menu

2.6.1 Edit Profile

The **Edit Profile** option in the **Profile** menu enables you to edit your (current logged in user) profile. To do so, follow these steps:

1. Click the profile drop-down menu and then click **Edit Profile** as shown in the figure:

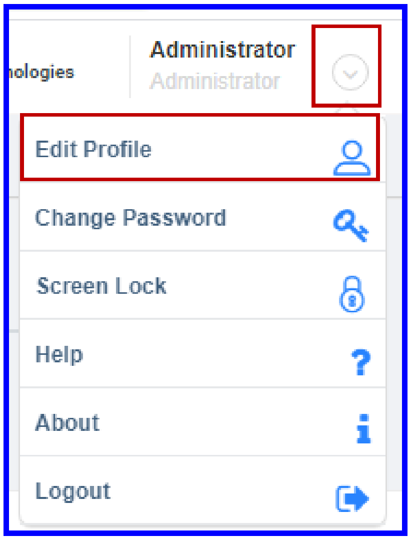


FIGURE: 7 - Profile Menu Showing Options

The **Edit Profile** screen (The Edit User screen in the User Master) appears as shown in the figure:

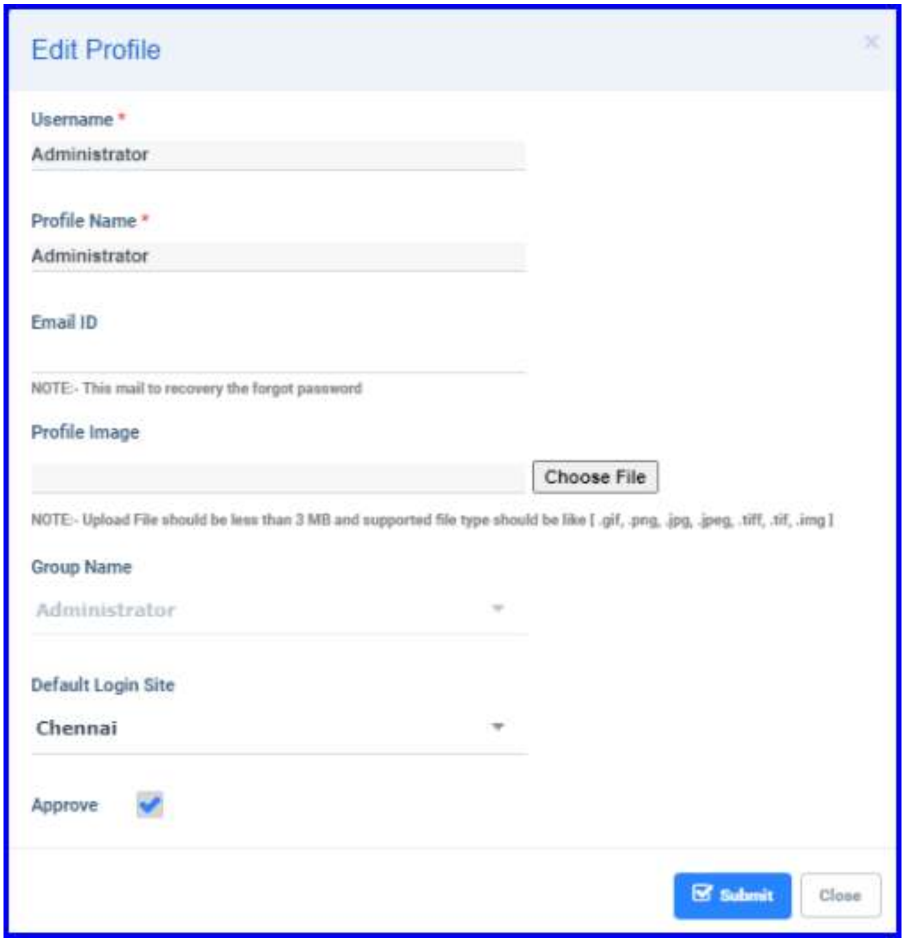


FIGURE: 8 - Edit User Profile Screen

2. You can edit required details and then click **Submit**. The user profile is updated.

2.6.2 Change Password

The Change Password screen enables you to change the password you use to login. To do so, follow these steps:

1. Click the profile drop-down menu and then click **Change Password.** The Change Password screen appears as shown in the figure:

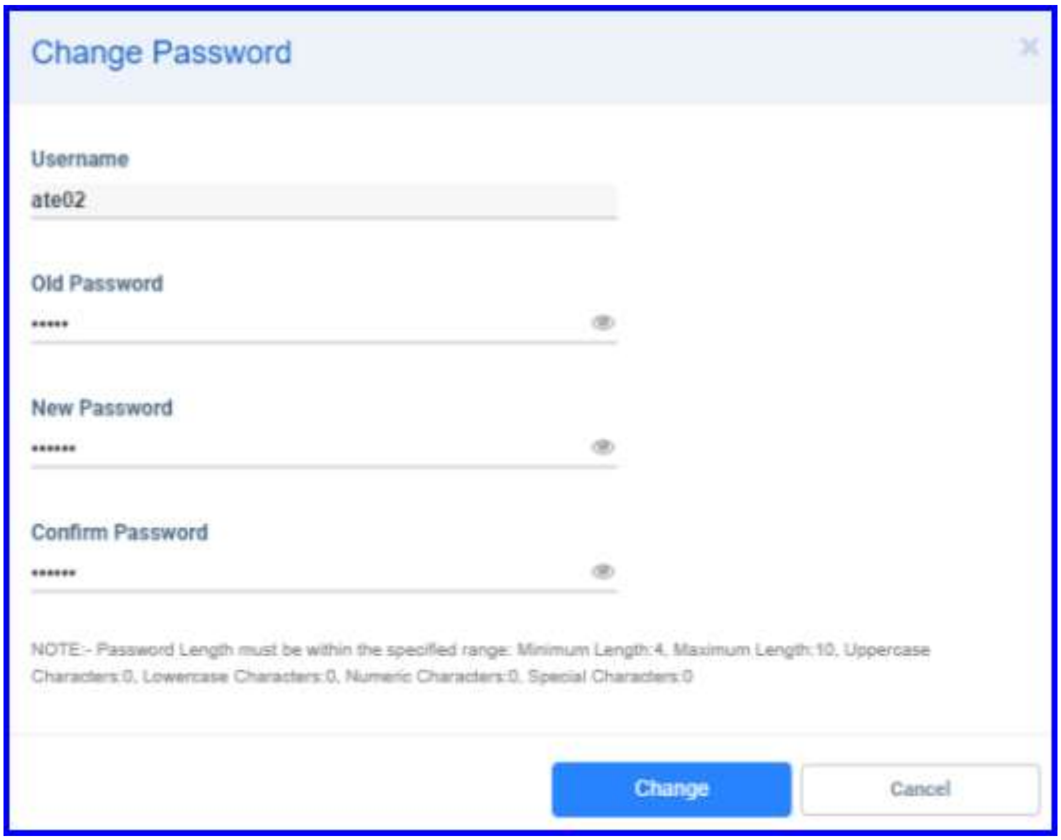


FIGURE: 9 - Change Password Screen

2. In the **Username** box, the current login user name appears.

3. In the **Old Password** box, type your current password.

4. In the **New Password** and **Confirm Password** box, type the new password.

__Note:__ By default, the passwords are hidden when you type. Click on the icon that appears next to the password fields to view password as you type.

5. Click **Change**. The password is changed and you can use the new password set to login from next login.

2.6.3 Screen Lock

The Screen Lock option enables to remove screen lock. The SDMS screen will be locked based on the Idle Time out set in the Preferences screen. When the screen is locked, do the following:

1. Click the profile drop-down menu and then click **Screen Lock.** The **Screen Lock** dialog appears as shown in the figure:

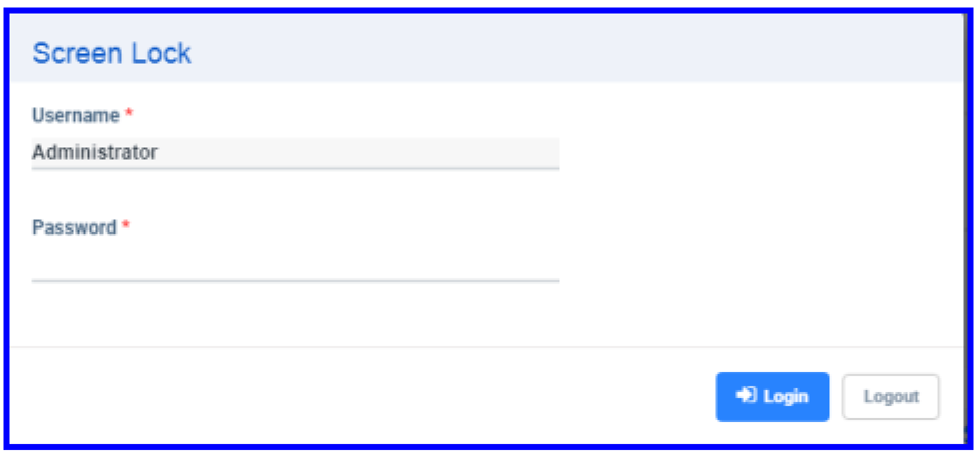


FIGURE: 10 - Screen Lock Dialog

2. In the **Password** box, type valid password and then click **Login**.

If required, you can also click **Logout** to log out SDMS application.

2.6.4 Help

This option helps you to view help file for the SDMS Web application.

1. Click the profile drop-down menu and then click **Help.** The help file is downloaded to the local disk. You can open the help file to open for accessing the help topics.

2.6.5 About

The About option helps you view details about the Logilab SDMS application such as the version, license and copy right.

1. Click the profile drop-down menu and then click **About.** The **About** dialog appears as shown in the figure:

FIGURE: 11- About Logilab SDMS Dialog

2. Click **More Service Information** to view list of currently running services in Logilab SDMS application.

2.6.6 Logout

The Logout option helps you logout Logilab SDMS.

1. Click the profile drop-down menu and then click **Logout.** The **Confirmation** dialog appears as shown in the figure:

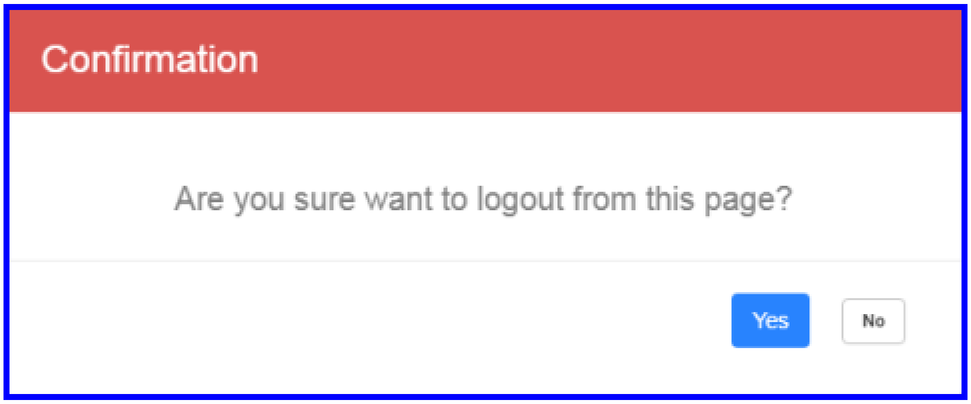


FIGURE: 12 - Confirmation Dialog

2. Click **Yes** to logout.

3 FTP Data View

3.1 Server Data Tab

Here you see the list of files uploaded in the storage server for the selected client/group as shown in the figure:

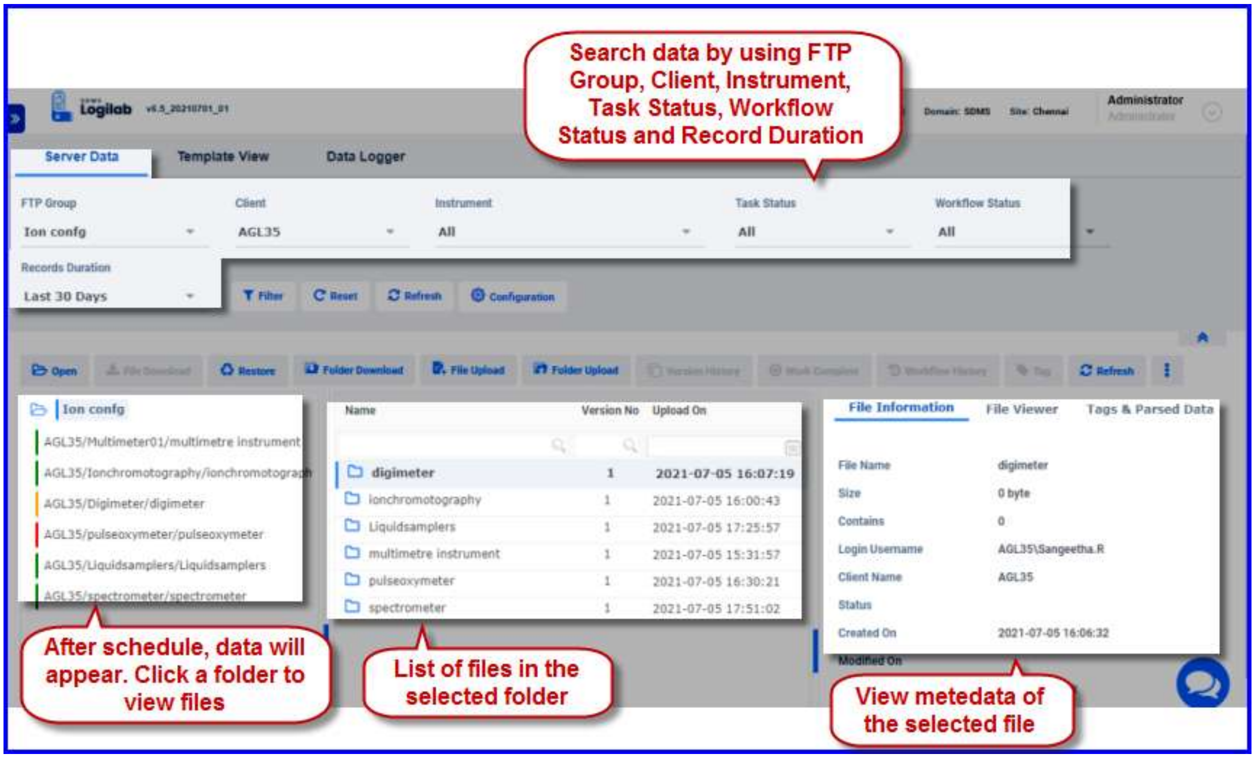


FIGURE: 13 - Server Data Tab

- You can also filter files based on Client, Instrument, Record Duration, Task Status and/or Workflow Status as shown in the above figure.
- In the **Task Status** field select All / Active / Deactive / Retire. Based on the selected status the files are fetched as shown in the figure:

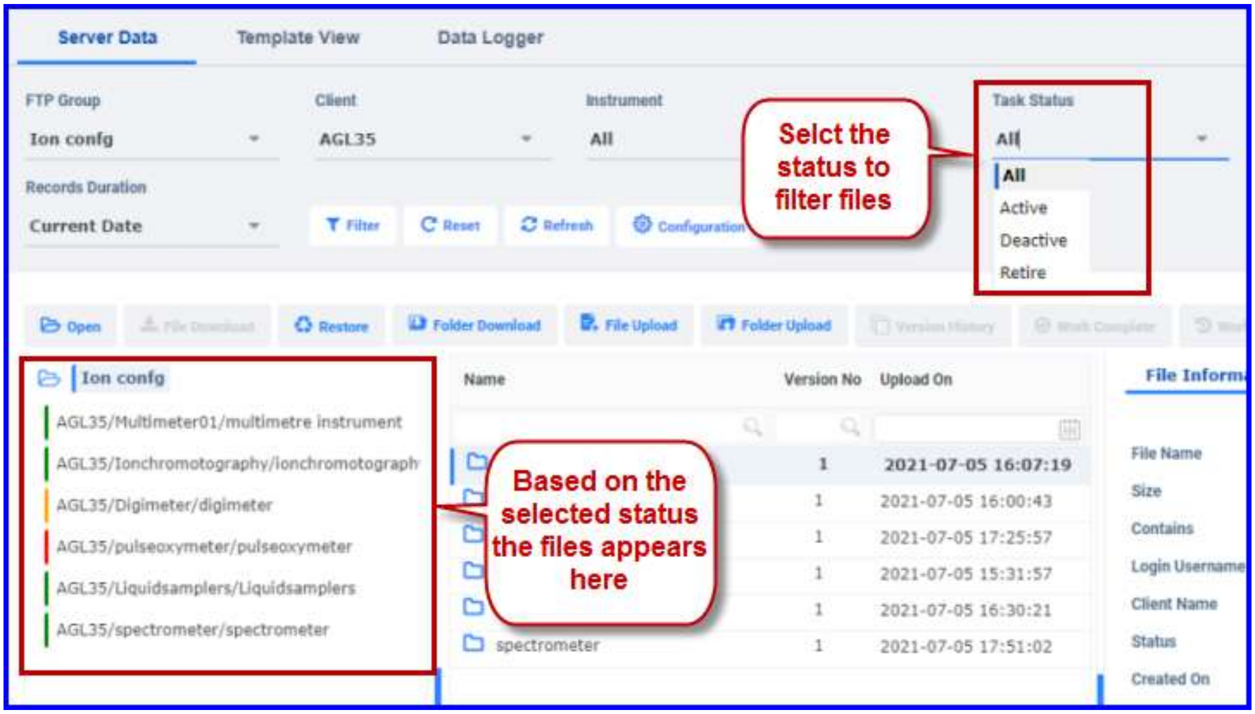


FIGURE: 13a - Filter Files Based on Task Status

- Files highlighted in green are active files.
- Files highlighted in orange are deactivated files.
- Files highlighted in red are retired files.

- The Configuration button helps you to customize by enabling/disabling following filters and actions in the data explorer.

Filters	**Action Controls**
Instrument	Open
Workflow Status	File Download
	Restore
	Folder Download
	File Upload
	Folder Upload
	Version History
	Workflow History
	Tag
	Audit Trail History
	Attribute

- All folders for the selected FTP location appear on the left panel. Double-click a folder and you can see the list of files in the folder on the center panel. Based on the file type (Image / audio / video), appropriate file icons appears as shown in the above figure.

- **Version History**: The Version History option enables the user to view list of versions of the file. For every change, a new version of the file is stored in the server as shown in the figure:

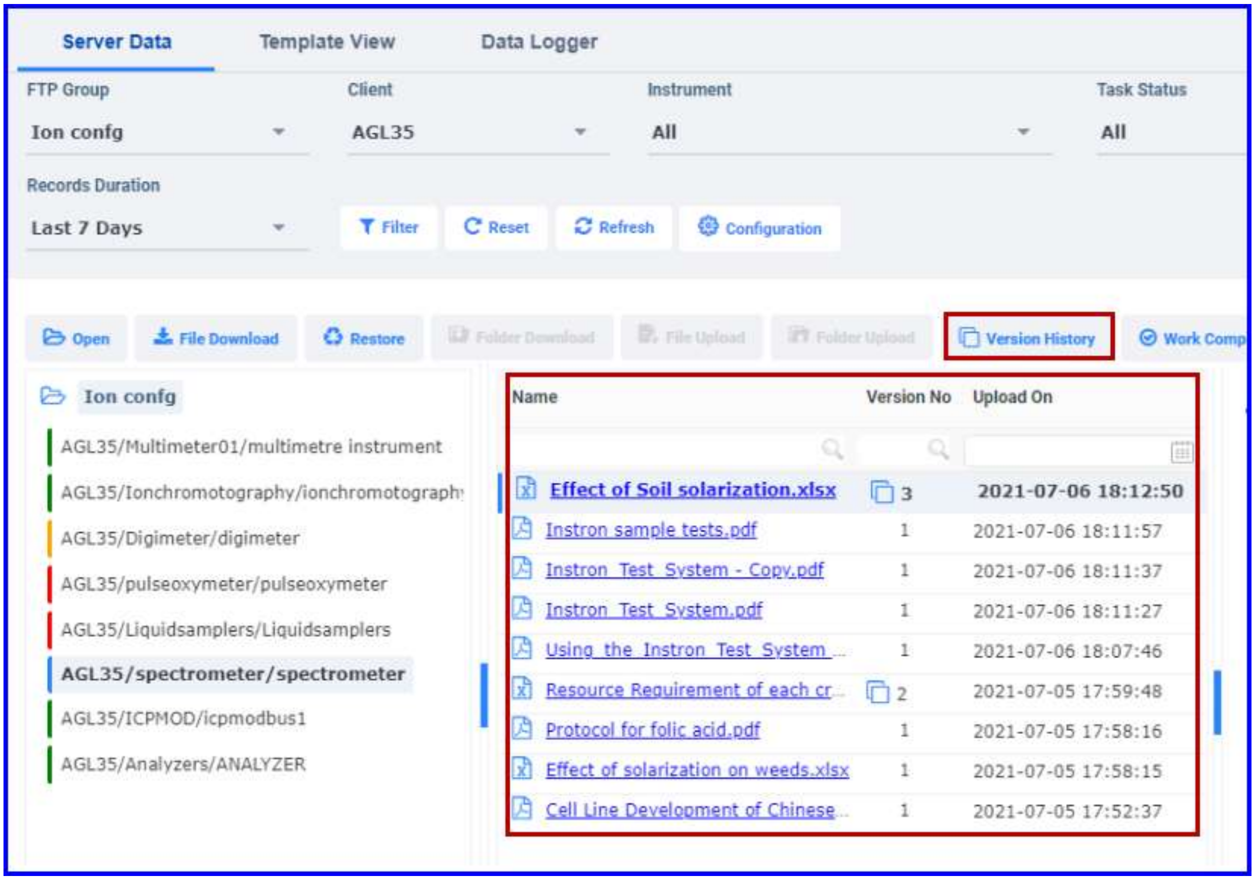


FIGURE: 13b - Server Data Tab – Version History Option

- Meta data of the selected file appears in the right panel. In the File information tab you can see the basic information of the file. And the Share Link that appears here helps you to share the file with other users. Copy the link and share it with other user. This link helps the user to view (only) the file content. The share link appears as shown in the figure:

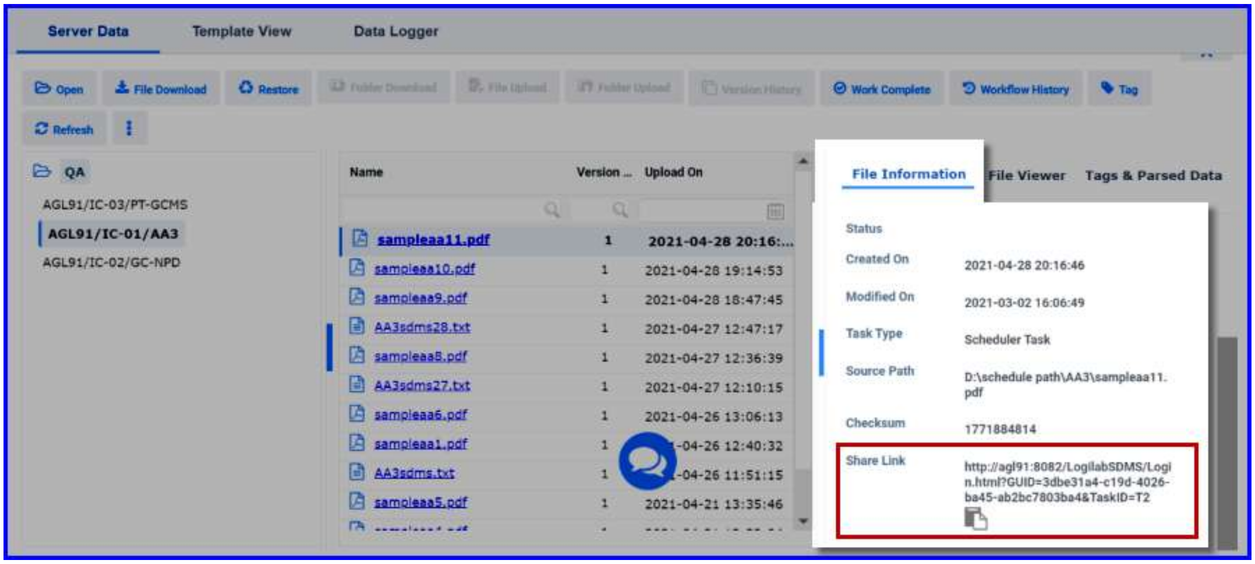


FIGURE: 13c - Server Data Tab – Share link Option

- **Workflow History**: Based on the user group, user and team workflow configured, the data will be verified. For example, the first user saves the data with work completed status. The reviewer reviews the data and finally the approver verifies the data. The current status of the file appears in the File Information tab as shown in the figure:

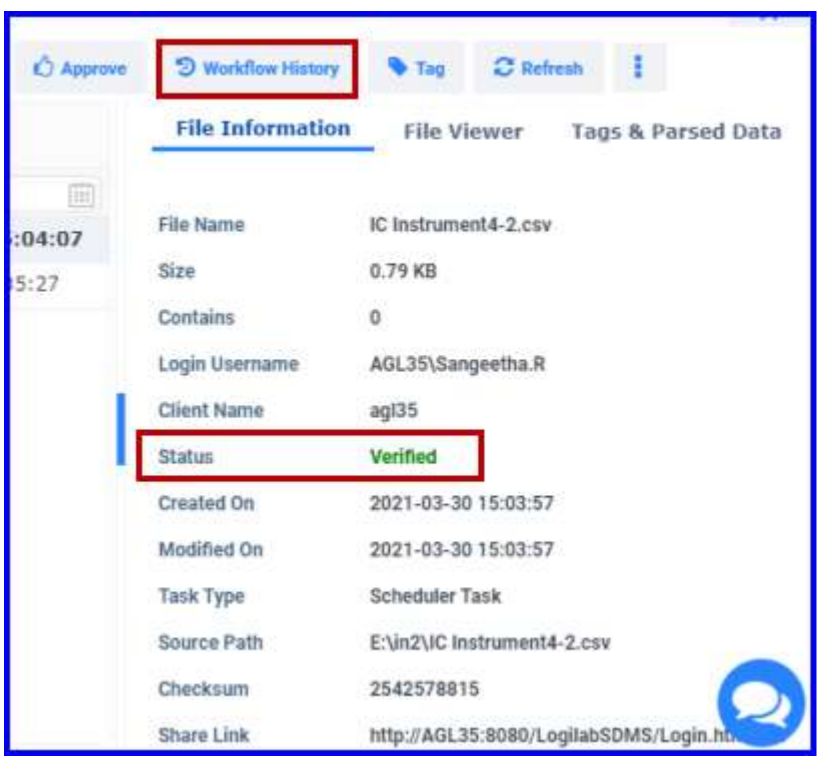


FIGURE: 13d - Server Data Tab – Workflow History Option

- In the **File Viewer** tab you can see the file content. i.e. Text / Image / Audio / Video. The file content appears as shown in the figure:

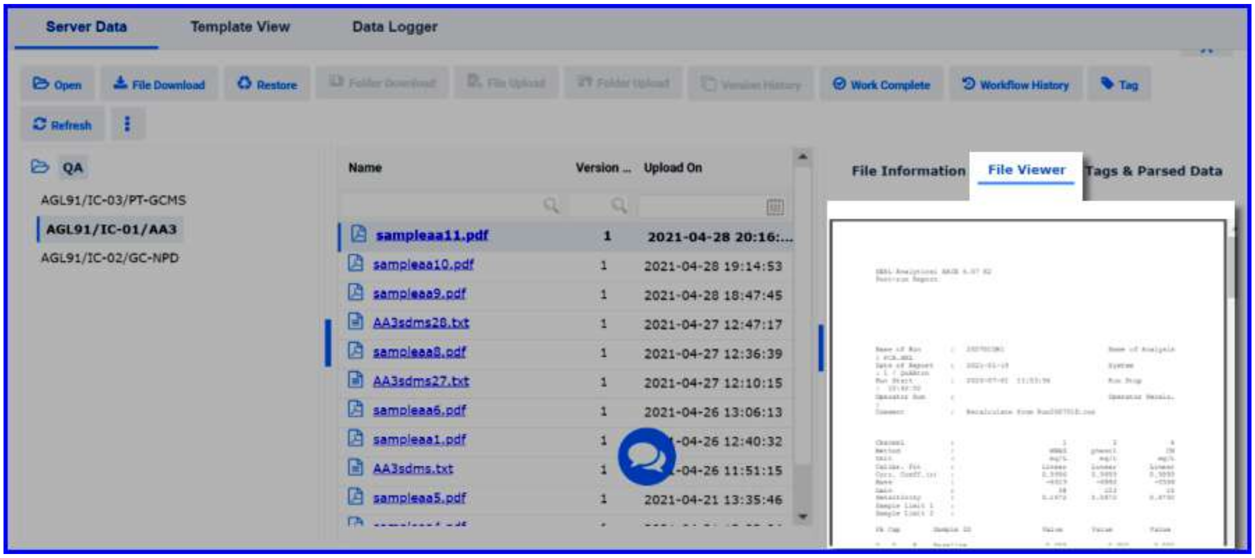


FIGURE: 13e – File Viewer Tab

- In the **Tags and Parsed Data** tab, you can view the tag details and parsed data of the selected file. The **Tags and Parsed Data** tab appears as shown in the figure:

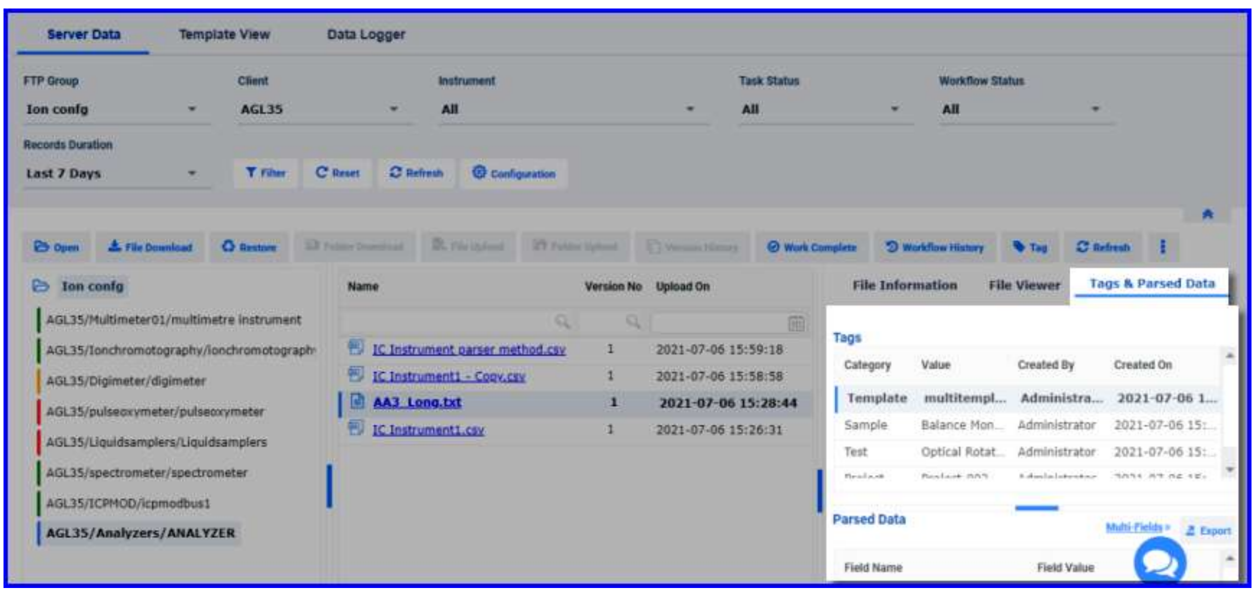
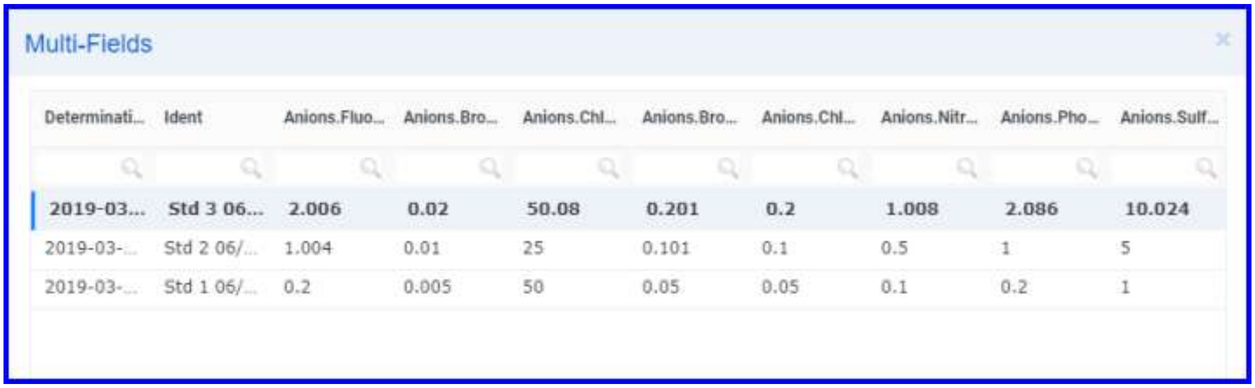


FIGURE: 13f - Tags & Parsed Data Tab

1. If multiple fields are parsed then you can click **Multi-Fields** to view parsed fields. The Multi-Fields dialog appears as shown in the figure:



Determinati...	Ident	Anions.Fluo...	Anions.Bro...	Anions.Chl...	Anions.Bro...	Anions.Chl...	Anions.Nitr...	Anions.Pho...	Anions.Sulf...
2019-03...	Std 3 06...	2.006	0.02	50.08	0.201	0.2	1.008	2.086	10.024
2019-03-...	Std 2 06/...	1.004	0.01	25	0.101	0.1	0.5	1	5
2019-03-...	Std 1 06/...	0.2	0.005	50	0.05	0.05	0.1	0.2	1

FIGURE 13g – Multi Fields Dialog

2. Click **Export** to export parsed fields to Excel sheet.

3.1.1 Search Server Data

The Search Server Data tab enables you to search records based on File, Tag and Parameter. You can search based on the selected field(s), records duration and by selecting the relational operator.

1. On the main menu, click , **FTP Data View**, and then click **Search Server Data**. The **Search Server Data** tab appears as shown in the figure:

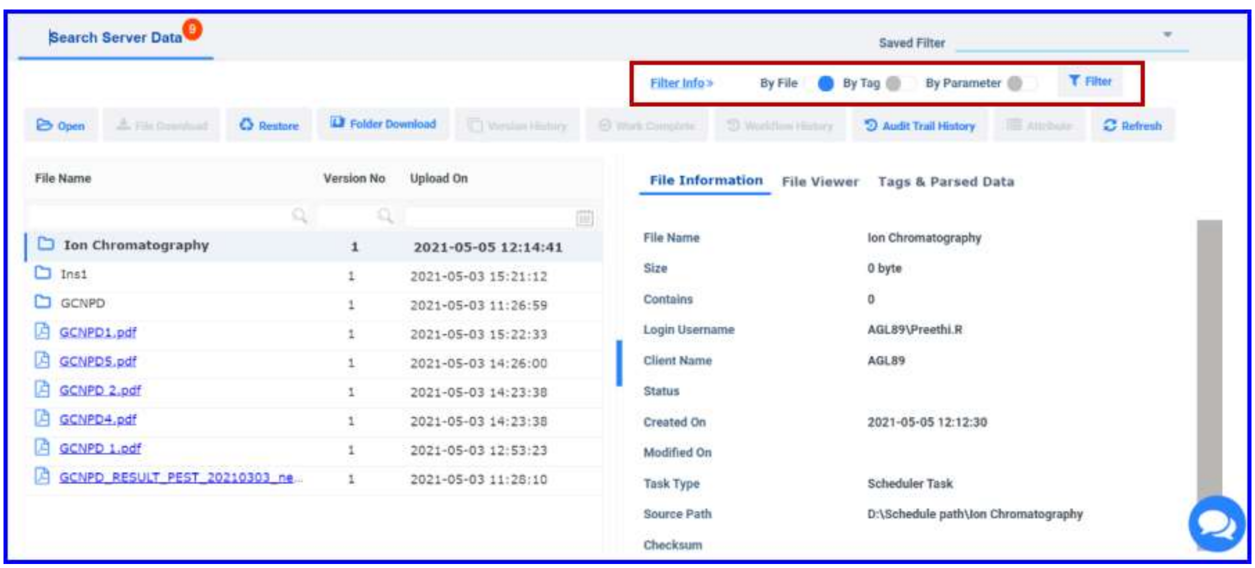


FIGURE: 13h - Search Server Data Tab

3.1.1.1 Search Server Data By File

1. Click to select the **By File** option as shown in the above figure and then click **Filter**. The **By File** filter screen appears as shown in the figure:

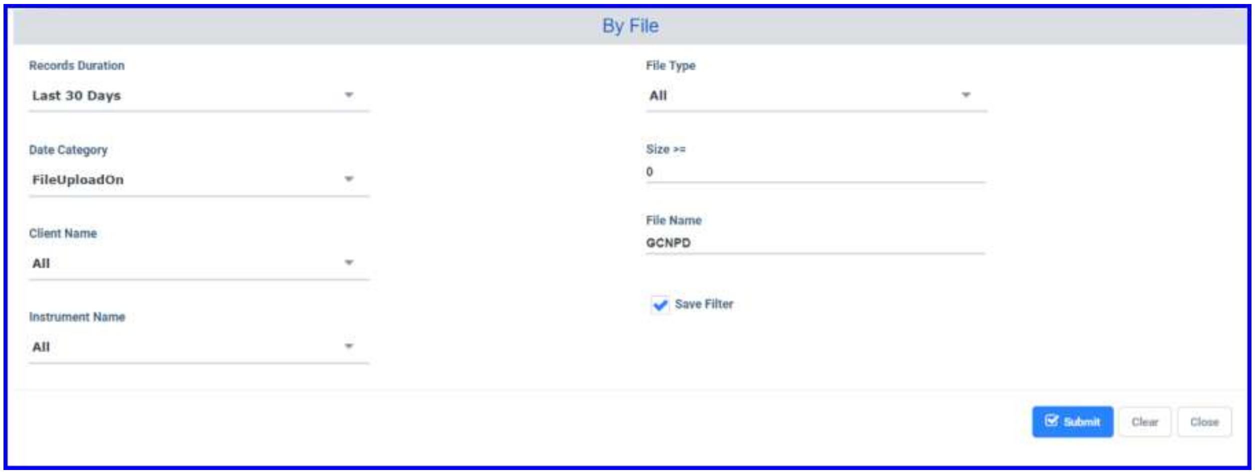


FIGURE: 13i - By File Filter Screen

2. In the **By File** filter screen, fill in the following fields appropriately. You can fill in fields whichever is required.
3. In the **Records Duration** field, select duration to fetch records.
4. In the **Date Category** field, select the date category to fetch records.
5. In the **Client Name** field, select the client.
6. In the **Instrument Name** field, select the instrument.
7. In the **File Type** field, select file type.
8. In the **Size >=** field, select the operator. For example, > / < / =.
9. In the **File Name** field, type the file name to fetch records.
10. Click to check the **Save Filter** check box to save the filter.
11. Click **Submit**.

3.1.1.2 Search Server Data By Tag

1. In the Search Server Data screen, click to select the **By Tag** option as shown in the above figure and then click **Filter**. The **By Tag** filter screen appears as shown in the figure:

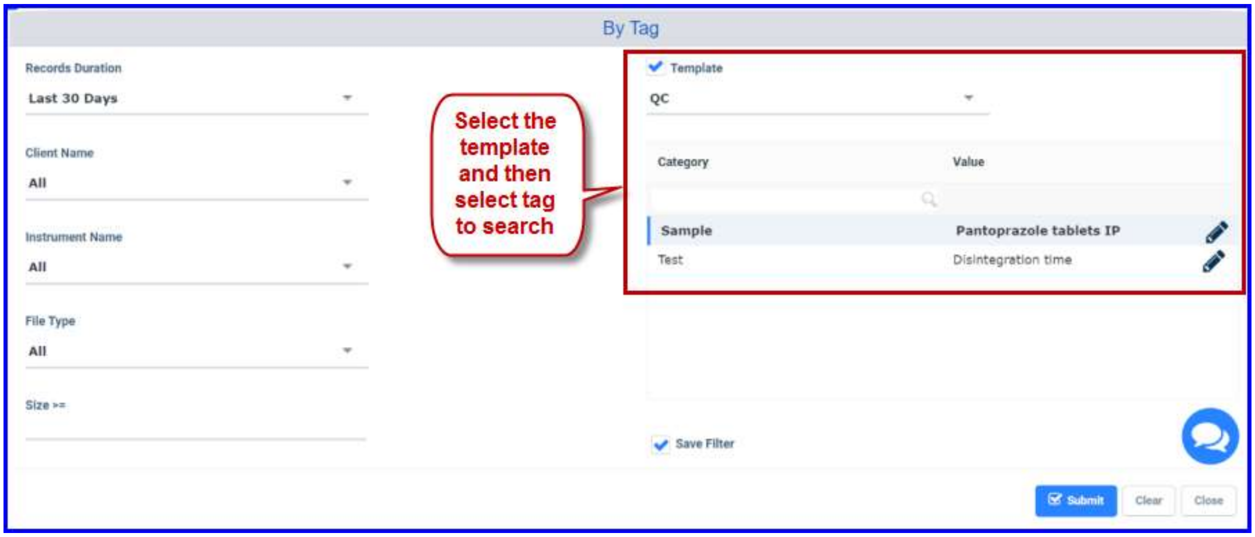


FIGURE: 13j - By Tag Filter Screen

2. In the **By Tag** filter screen, fill in the following fields appropriately. You can fill in fields whichever is required.

3. In the **Records Duration** field, select duration to fetch records.

4. In the **Client Name** field, select the client.

5. In the **Instrument Name** field, select the instrument.

6. In the **File Type** field, select file type.

7. In the **Size >=** field, select the operator. For example, > / < / =.

8. Click to check the **Template** check box to select a template. And then select the template from the list. Tags that are available in the selected template appears below as shown in the above figure. Select the tag

9. Click to check the **Save Filter** check box to save the filter.

10. Click **Submit**. Records matching the selected tag and other search criteria are fetched and appears as shown in the figure:

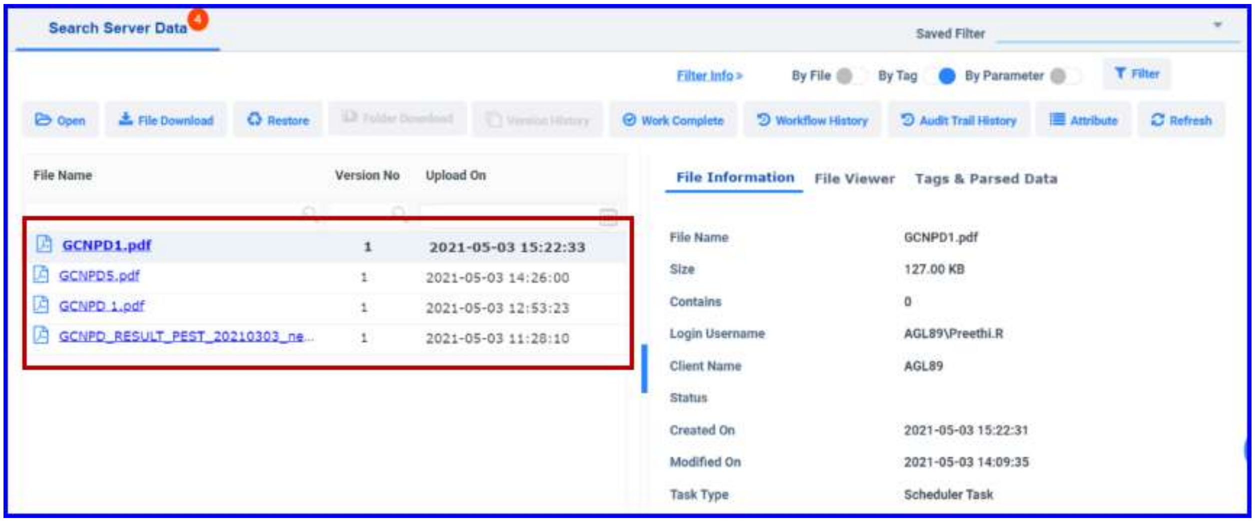


FIGURE: 13k – Server Data Fetched - By Tag Filter

3.1.1.3 Search Server Data By Parameter

1. In the Search Server Data screen, click to select the **By Parameter** option and then click **Filter**. The **By Parameter** filter screen appears as shown in the figure:

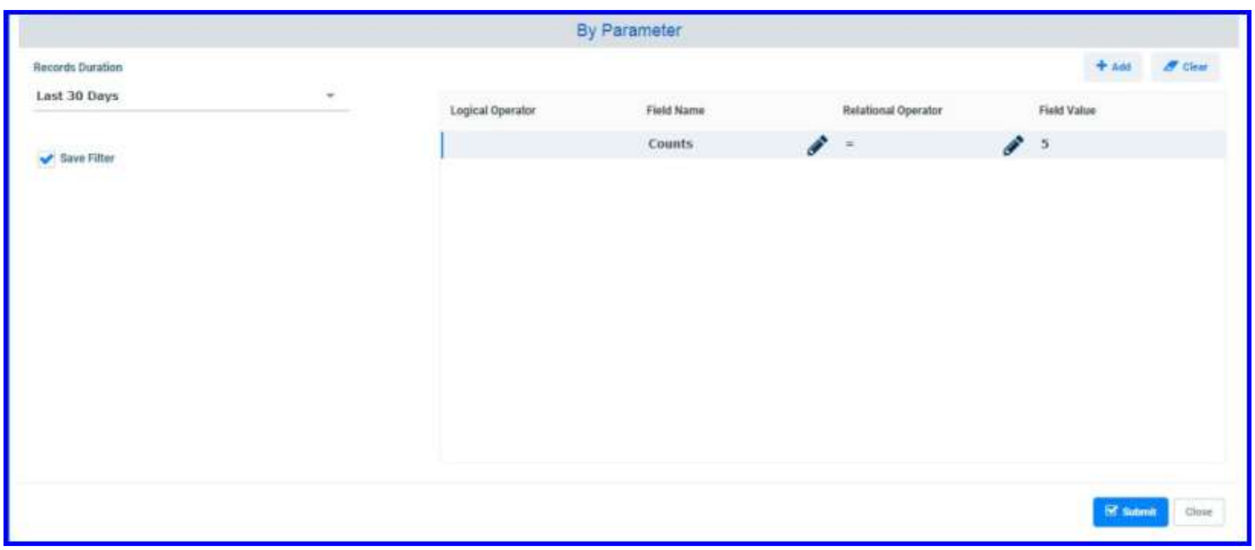


FIGURE: 13 l - By Parameter Filter Screen

2. In the **By Parameter** screen, in the **Records Duration** field, select duration to fetch records.

3. In the **Field Name** field, click and then select the field to search. Click **+ Add** to add more fields to the filter.

4. In the **Relational Operator** field, click and then select the operator. For example, =, >, < etc.

5. In the **Field Value** field, type the value.

6. Click to check the **Save Filter** check box to save the filter setting.

7. Click **Submit**. The **Save Filter** dialog appears as shown in the figure:

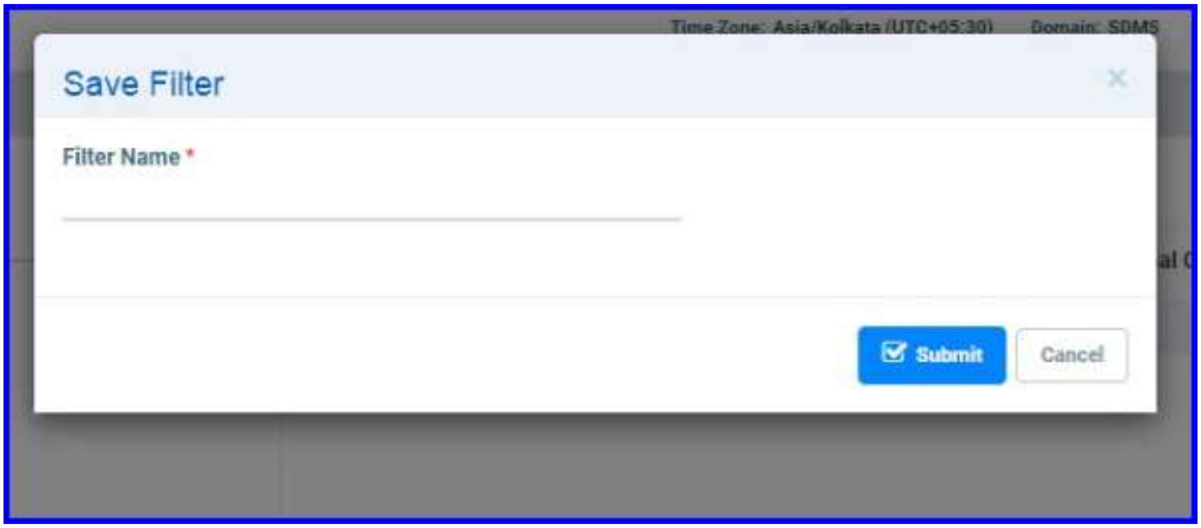


FIGURE: 13m – Save Filter Dialog

8. In the **Filter Name** field, type a name for the filter you want to save and then click **Submit**. The chart view of the filtered server data appears as shown in the figure:

FIGURE: 13n – Multi Fields Chart View

9. Click Grid. The grid view of the filtered server data appears as shown in the figure:

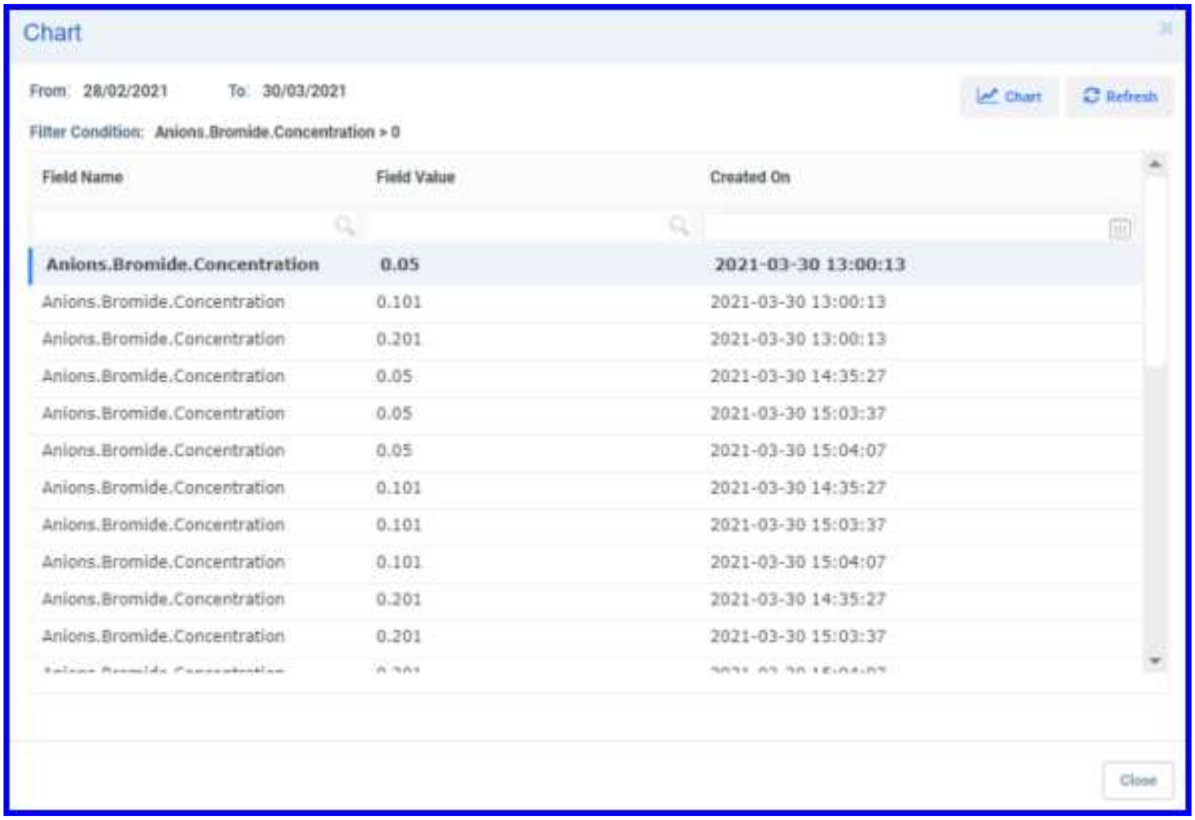


FIGURE: 13o – Multi Fields Grid View

- For more information on FTP Group, refer FTP Configuration.
- For more information about Clients refer Client Master.

3.1.2 Action Controls

- **Open** - Select a file in the center panel and then click **Open** to view its contents.
- **File Download** - Select a file in the center panel and then click **File Download** to download the file to the local computer.
- **Restore** – Restores the file to the source location (client) from where the file is initially uploaded.
- **File Upload** – Enables to upload files manually.
- **Folder Upload** – Enables upload folders manually.

*Note: File Upload and Folder Upload options are enabled only if the **Enable Manual Upload** option in the Preferences screen is enabled.*

- **Work Complete** – Helps to change the status of the file. Once the work is completed, select a file and click **Work Complete**. The **Electronic Signature** screen appears. Type your password, in the **Decision** box, select the status i.e Work Completed, in the **Comments** box, type comments and then click **Submit**. Now the record/file will go to the Review stage.

- **Workflow History** – Select a file and click Workflow History. Details of workflow stages the file passed through will appear in the Workflow History screen.

- **Tag** – Enables view and update tag details for the selected file.

- **Multi-File Status Update** – This option helps to change status of the multiple files in the workflow. In the Server Data Tab click Multi-File Status Update as shown in the figure:

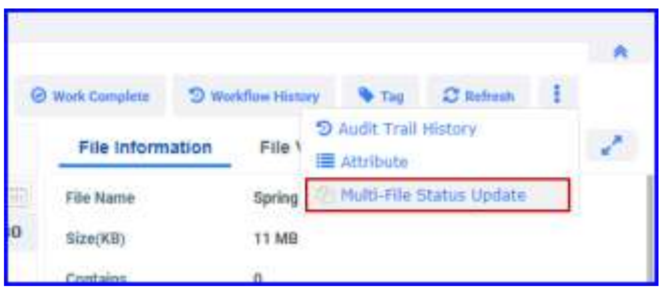


FIGURE: 13p - Multi-file Status Update

The Workflow Status screen appears as shown in the figure:

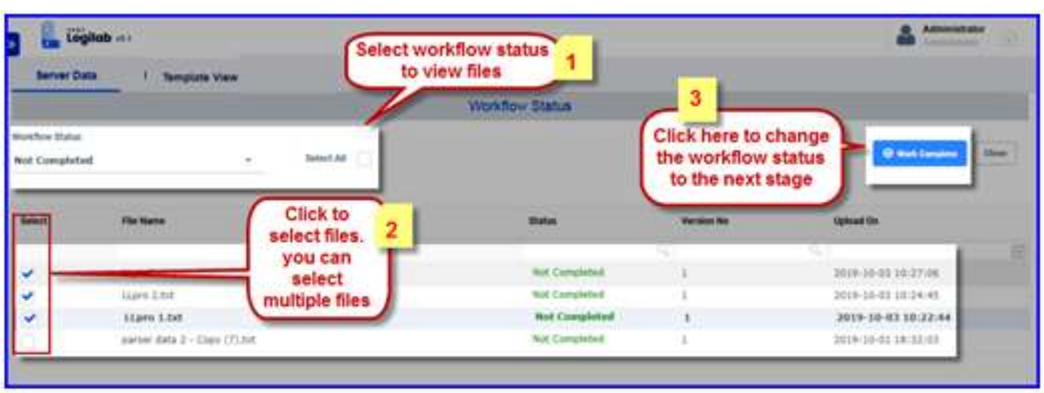


FIGURE: 13q – Updating Status of Multiple Files

Follow the on screen instructions to update status of multiple files.

- **Audit Trail History**: Enables view audit trail history of the server data as shown in the figure:

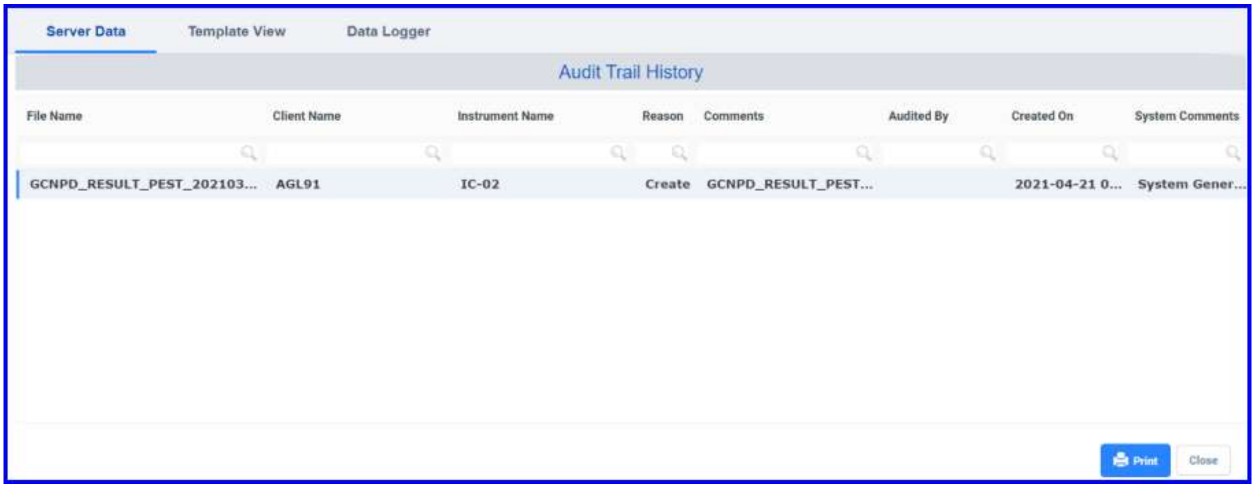


FIGURE: 13r - Audit Trail History

- **Attribute**: Enables view attributes of the selected record/document as shown in the figure:

FIGURE: 13s -Attribute

3.2 Template View Tab

When a file is received from an instrument, the file is filtered and captured based on the template parameters set in the Instrument lock screen. And the files are listed with the tag values as shown in the figure:

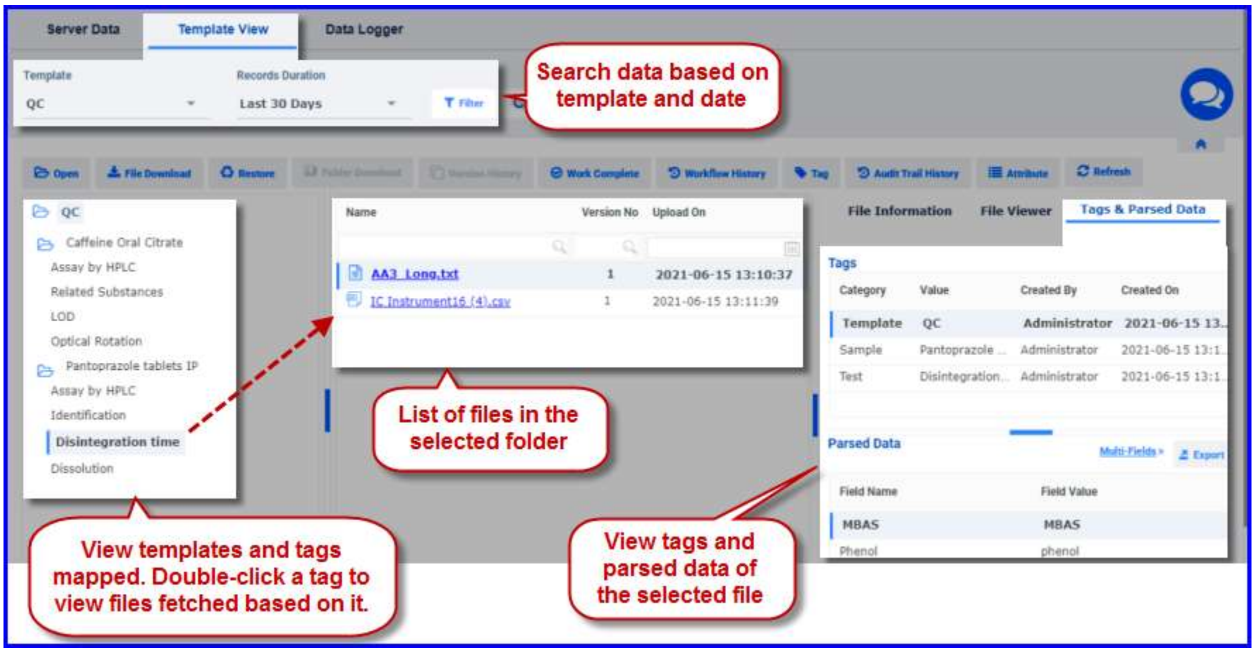


FIGURE: 14 - Template View Tab

You can also double-click the file from the list to open to view the contents as shown above.

Instrument Lock helps in linking metadata from the template tags. Before capturing data from an instrument, user can lock the instrument with specific combination of tags. These tags are automatically linked to the next data capture from instrument. The **Template Data** tab helps in viewing the server data based on the templates. This gives a more meaningful view for the data captured from instruments. For example: A quality control analyst will be interested in viewing data based on product>test>batch#. To know more about instrument lock, refer Instrument Lock and Tags.

3.3 Data Logger Tab

The Data Logger tab enables filter and view captured file log based on the FTP Group, Client, Instrument and specified date range. You can filter file log based on the Data Type: Alarm /

Reading / Both and Channel: A1/ B1/A2/B2/All. The Data Logger tab appears as shown in the figure:

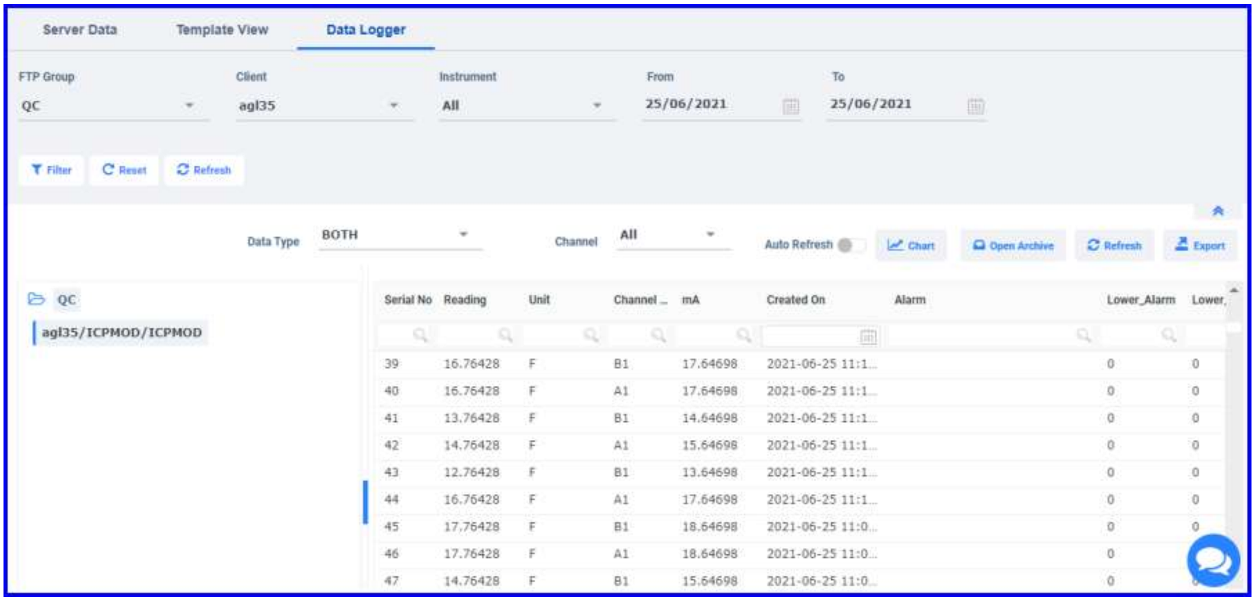


FIGURE: 15 - Data Logger Tab Showing Log in Grid

> ***Note**: Data Logger feature is applicable only for interfacer mapped instruments.*
>
> *If the **Data Logger** checkbox in the **Scheduler** screen is checked, then for every capture from the instrument, log is created and stored in the specified path.*

Auto Refresh: If you enable the **Auto Refresh** option, the log screen is refreshed with new entry for every capture from the instrument.

3.3.1 Chart View

By default, the Data Logger screen appears in the grid. You can click  to view log in the chart form for all data types: Alarm / Reading / Both and for the selected channel as shown in the figure:

FIGURE: 16 - Data Logger Tab Showing Log in Chart for the Selected Data Type and Channel

3.3.2 Open Archive

Data log can be archived if the same is mentioned in the scheduler. Click Open Archive to view the log in the archive. The Open Archive screen appears as shown in the figure:

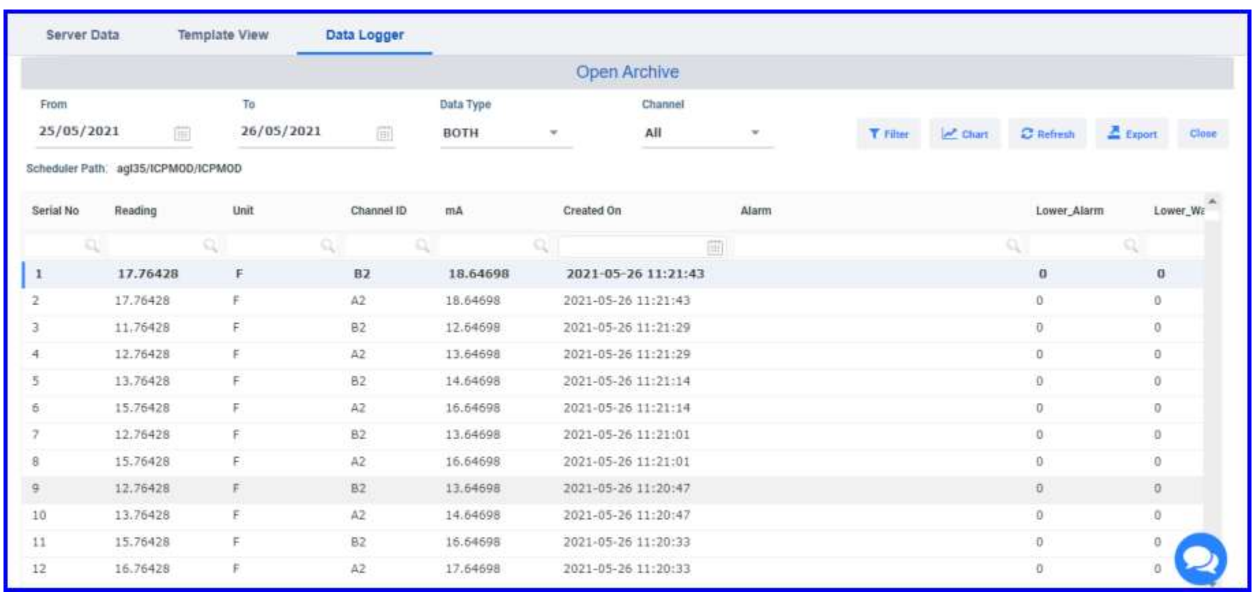


FIGURE: 17 - Data Logger Tab Showing Log in the archive

To view the archive in the chart click Chart. The chart view appears as shown in the figure:

FIGURE: 17a - Data Logger Tab Showing Log in the archive – Chart View

4 Masters

Masters menu helps the administrators to add and manage domains, clients, instruments, sites, templates and tags.

Following are the basic masters in Logilab SDMS:

- Domain
- Client
- Instrument
- Site
- Templates and Tags

You can add and edit, export and print master entries in the respective master tabs.

4.1 Domain Master

Domain Master enables the administrator to add existing corporate domains to Logilab SDMS. You can add both servers based and database based domains.

To add a domain to Logilab SDMS, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears and by default, the **Domain** master tab appears as shown in the figure:

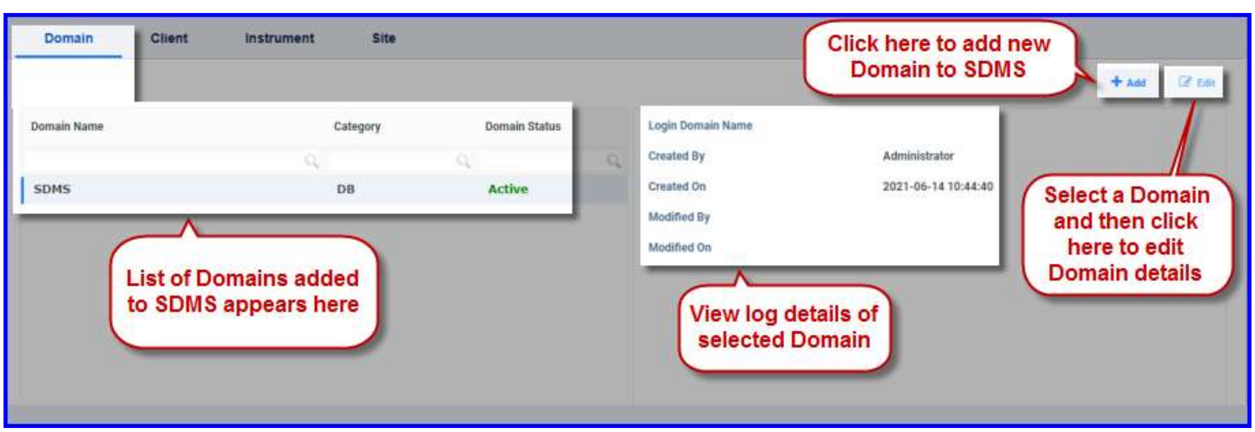


FIGURE: 18 - Domain Master Screen

You can see the list of domains added to SDMS.

2. Click **Add** to add a new domain. The **Add Domain** dialog appears as shown in the figure:

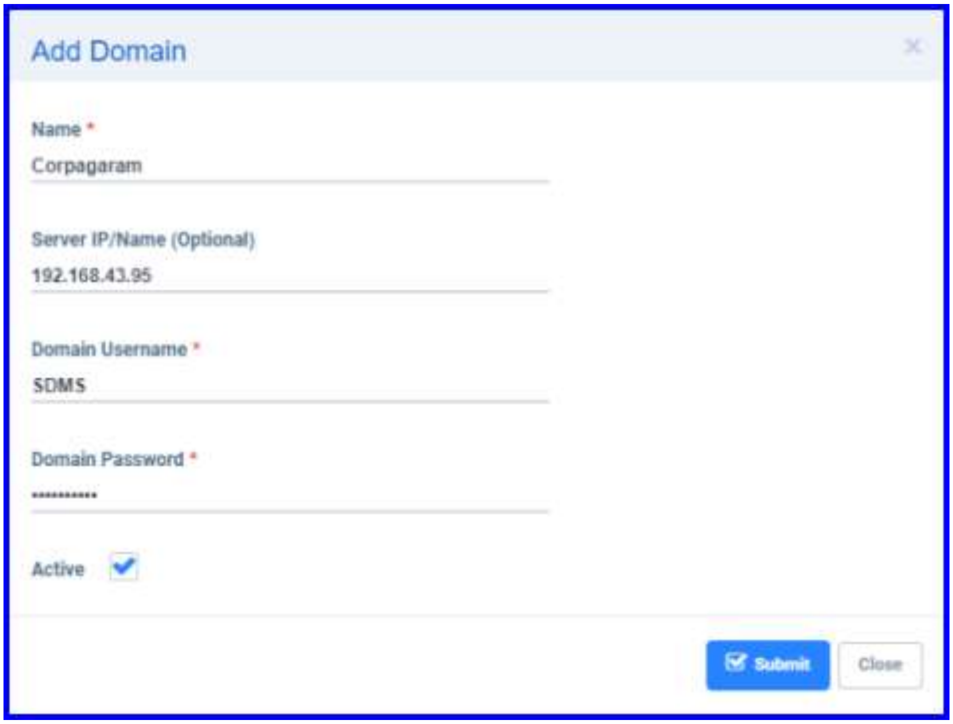


FIGURE: 19 - Add Domain Dialog

3. In the **Name** field, type the domain IP Address you want to add.
4. In the **Server IP/ Name (Optional)** field, type the IP address of the domain as shown in the above figure.
5. In the **Domain Username** and **Domain Password** boxes, use the user name and password that you use to authenticate the domain.
6. Click **Active** to make the domain active in the SDMS.
7. Click **Submit** to save the domain.

4.1.1 Editing Domain

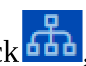
1. In the Domain master tab select a domain from the list and then click **Edit**. The Edit Domain dialog appears. You cannot edit the **Name** and **Login Domain Name** fields in the Edit Domain dialog.

2. Update other details if required and then click **Submit**. The **Audit Trail** dialog appears.

3. In the **Audit Trail** dialog, type the password, select reason for editing, type your comments and then click **Submit**.

4.2 Client Master

Computers that are connected to the instruments are called clients. Client computers pull data from the instruments. Client master enables you to add client machines to SDMS. When you add a client you can map instruments to the client. You can also add a new instrument to the client if required.

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Client** to go to the **Client** master tab. The Client Master tab appears as shown in the figure:

The Client Master tab enables you to do the following:

- Add Client
- Edit Client details
- Export Client Master to Excel
- Print Client Master

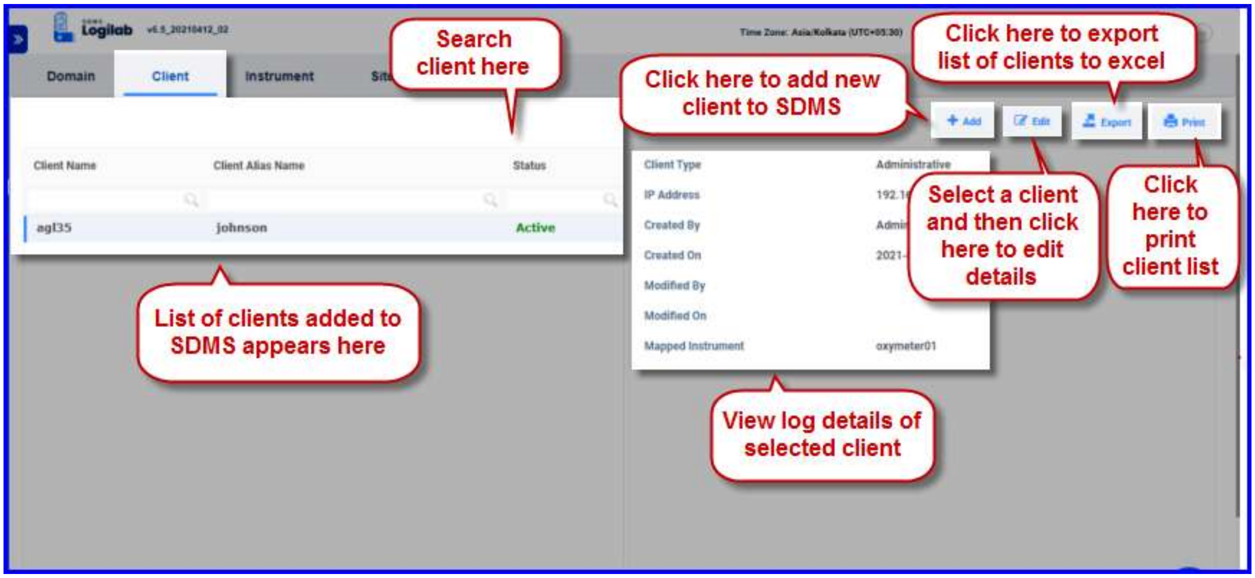


FIGURE: 20 - Client Master Tab

4.2.1 Add Client

To add a client to the Client Master, follow these steps:

1. In the **Client Master** tab, click + Add. The **Add Client** dialog appears as shown in the figure:

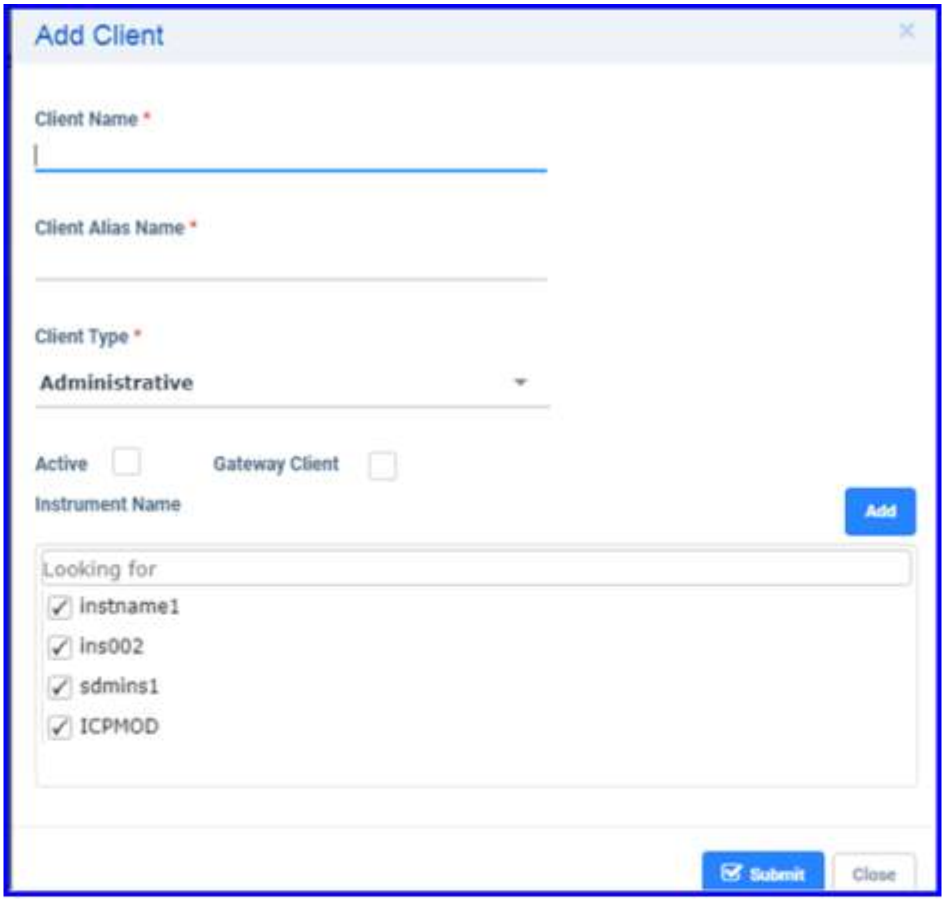


FIGURE: 21 - Add Client Screen

2. In the **Client Name** box, type the name of the client machine to add.
3. In the **Client Alias Name** box, type the alias name for the client.
4. From the **Client Type** box, select the type of the client.

Different Client Types in SDMS has different purpose. And the list is as follows:

- **Instrument Client** is common type used to capture data from an instrument.
- **Document Client** is for capturing non-instrument files.
- **Administrative Client** is for review and configuration purpose.
- **Empower Client** is to empower instrument configuration.

5. Click to check the **Active** check box to make the client active.

6. Click to check the **Gateway Client** check box to make the client gateway client.
7. In the **Instrument Name** box, if there are instruments then, click to select instruments from the list to map them to the client.

Note: *If the instrument is already mapped to some other client, then you will not be able to map that instrument.*

8. Alternatively, you can click to add an instrument to the client. To see how to add an instrument, click here.
9. Click **Save**.

4.2.2 Edit Client Details

To edit client details, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Client** to go to the client master tab. The Client Master tab appears.
2. In the **Client Master** tab, click to select the client from the list you want to edit and then click . The **Edit Client** screen appears as shown in the figure:

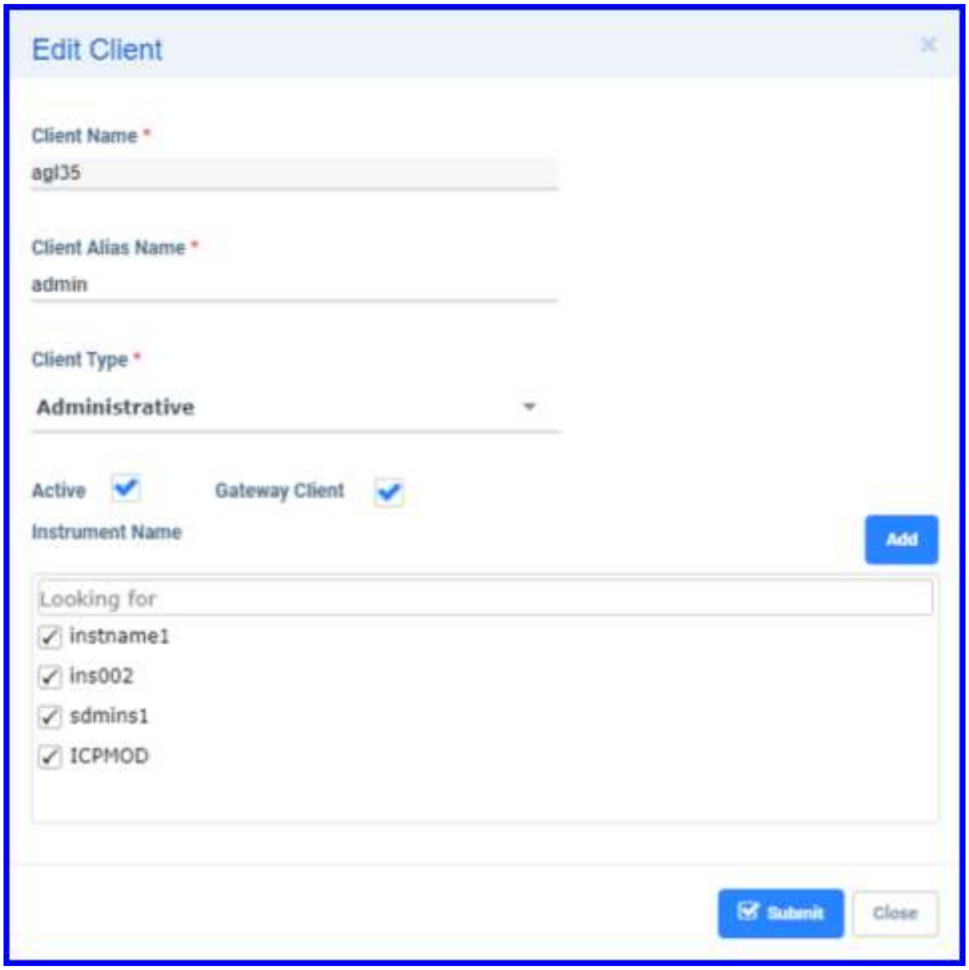


FIGURE: 21a – Edit Client Screen

3. Do the required changes to the client details and then click **Save** to save the changes.

Note:

*a. You connot edit **Client Name**.*

b. You cannot deactivate a client if the client has an active schedule. You will see a warning message saying "The client have an active schedule. So cannot deactivate this client".

4.2.3 Export Client Master to Excel

To export Client Master to Microsoft Excel, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Client** to go to the client master tab. The Client Master tab appears.

2. In the **Client Master** tab, click Export. The file **Save As** dialog appears.

3. In the **Save As** dialog locate the folder where you want to store the Excel file and then in the **File Name** box, type a name for the exported file.

4. Click **Save**.

4.2.4 Print Client Master

To print Client Master, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click Client to go to the Client master tab. The **Client Master** tab appears.

2. In the **Client Master** tab, click Print. The Print screen appears as shown in the figure:

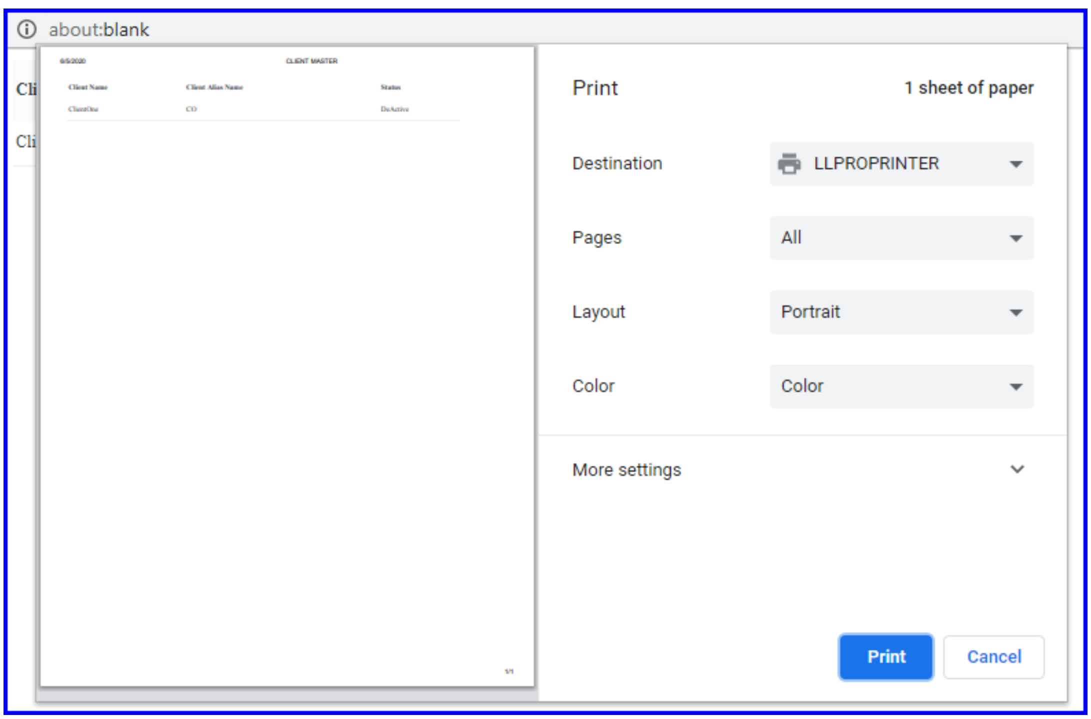


FIGURE: 22 - Print Client Master Dialog

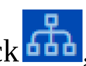
3. In the **Print** dialog, you can see the print preview of the client master on the right side.

4. Click **Print** to print the client list.

4.3 Instrument Master

The Instrument master tab enables you to do the following:

- Add instruments
- Edit instrument details
- Export Instrument Master to Excel
- Print Instrument Master

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Instrument** to go to the Instrument master tab. The **Instrument** master tab appears as shown in the figure:

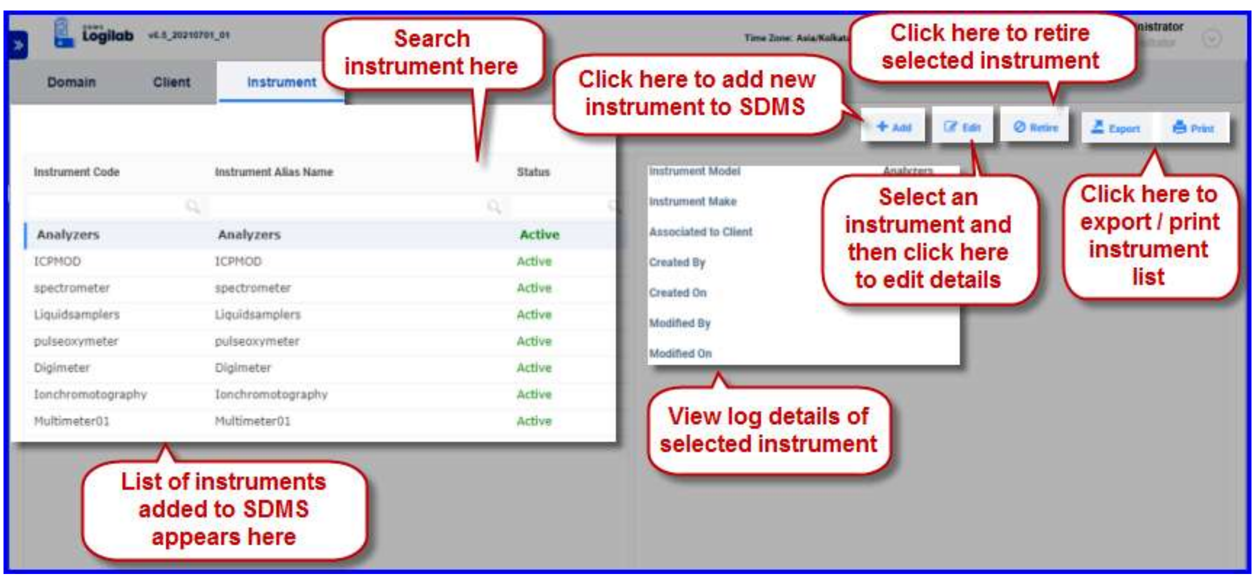


FIGURE: 23 - Instrument Master Tab

4.3.1 Add Instrument

To add an instrument to the Instrument master, follow these steps:

1. On the **Instrument** master screen, click . The add instrument screen appears as shown in the figure:

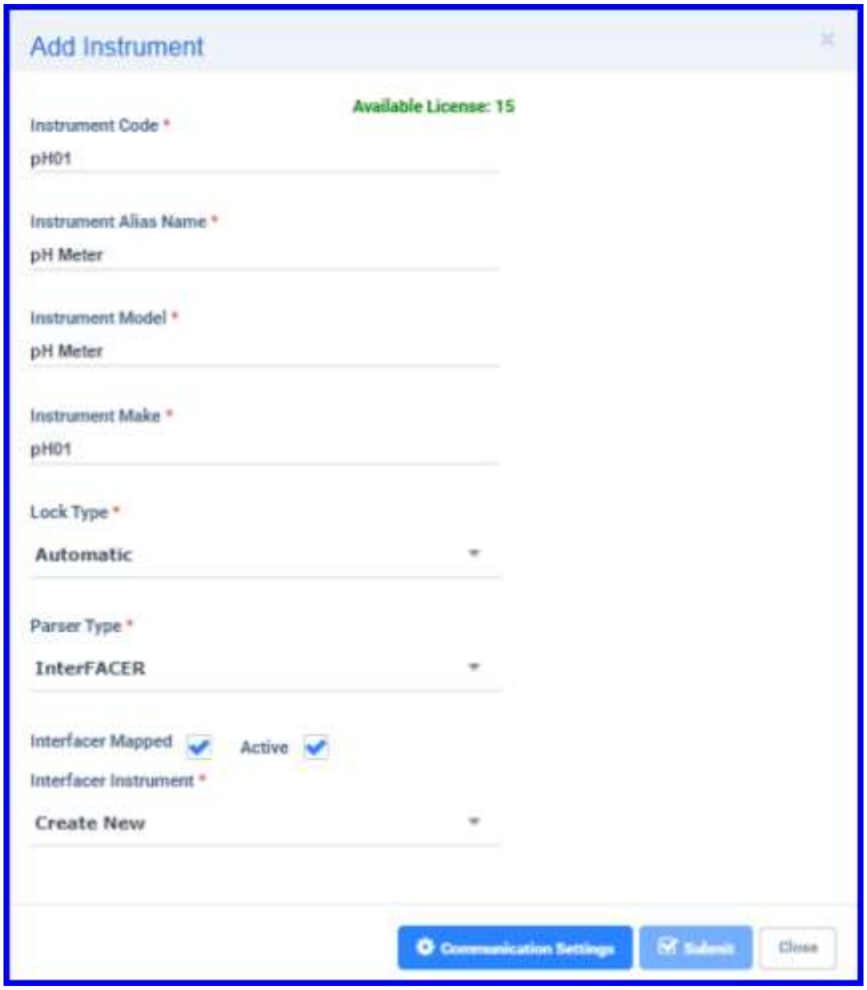


FIGURE: 24 - Add Instrument Screen

2. In the **Instrument Code** box, type the name of the instrument you want to add.
3. In the **Instrument Alias** box, type the alias name for the instrument.
4. In the **Instrument Model** box, type the model of the instrument.
5. In the **Instrument Make** box, type the make/manufacturer name of the instrument.
6. In the **Lock Type** box, select **Automatic** / **Manual**. If you select **Automatic**, the instrument will be locked automatically when in use. If you select **Manual**, then you need to go to the **Lock Settings** screen and lock the instrument manually.

7. In the **Parser Type** box, select **NONE** / **InterFACER**.

8. **Active**: specifies if the instrument is active.

Note: *If SDMS is integrated with ELN or InterFACER, respective option appears in as shown above. If SDMS is configured as standalone, then the Active check box alone appears. Integration of SDMS with ELN / InterFACER / standalone is done in DB settings.*

9. Click **Submit**.

4.3.2 Add ELN Instrument

All files received from ELN instruments are parsed. If ELN is integrated with SDMS, the Parser Type field appears in the Add Instrument screen.

- Select the **Parser Type** for the ELN instrument. And then click **Save**.

4.3.3 Add interfacer Instrument WITH / NO parsing

Interfacer is a middleware application runs as windows service.

Interfacer Mapped option – If checked then the user will be able to save communication settings for the instrument as interfacer instruments are connected and can communicate via RS232/TCPIP. Or user can select the exiting interfacer instrument.

Parser Type options (None, Web Method, interfacer), if the instrument has fields to parse then the parser engine can be selected here.

Web Method – Method will parse the fields.

Interfacer – Interfacer service will parse the fields.

If interfacer is integrated with SDMS, the **Interfacer Mapped** check box, **Parser Type** field and the **Communication Settings** field will be enabled in the Add Instrument screen as shown in the figure:

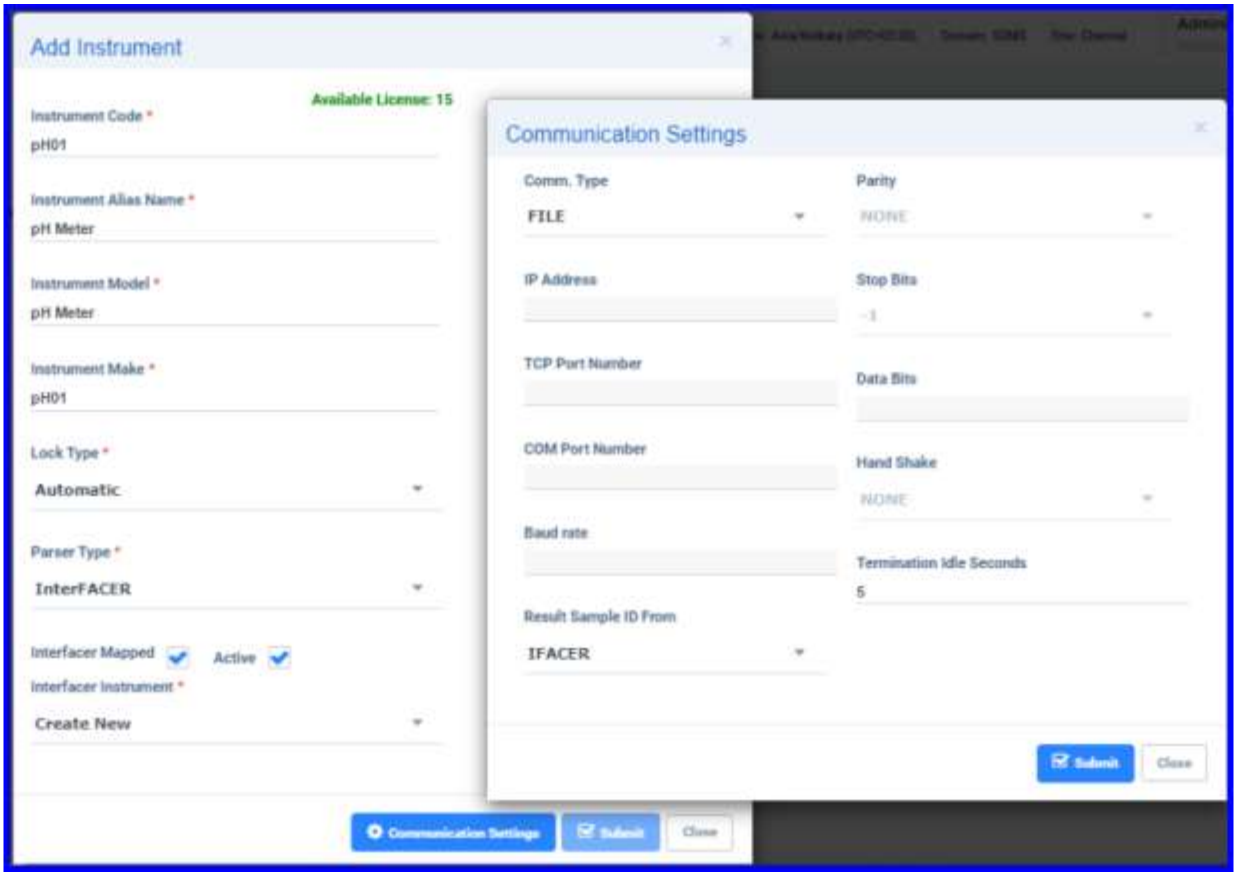


FIGURE: 25 - Adding Interfacer Instrument With / No Parsing

10. In the **Parser Type** box, select Interfacer.

11. Click to check the **Interfacer Mapped** check box. When Interface Mapped option is checked, the **Interfacer Instrument** list box appears and you can select the interfacer instrument to add as shown in the figure:

Note: *Select NONE for NO Parsing type. In the NO parsing type the files may be parsed by a third party tool.*

12. In the **Interfacer Instrument** box, select **New Instrument**.

13. Click **Communication Settings**. The **Communication Setting** dialog appears as shown in the figure:

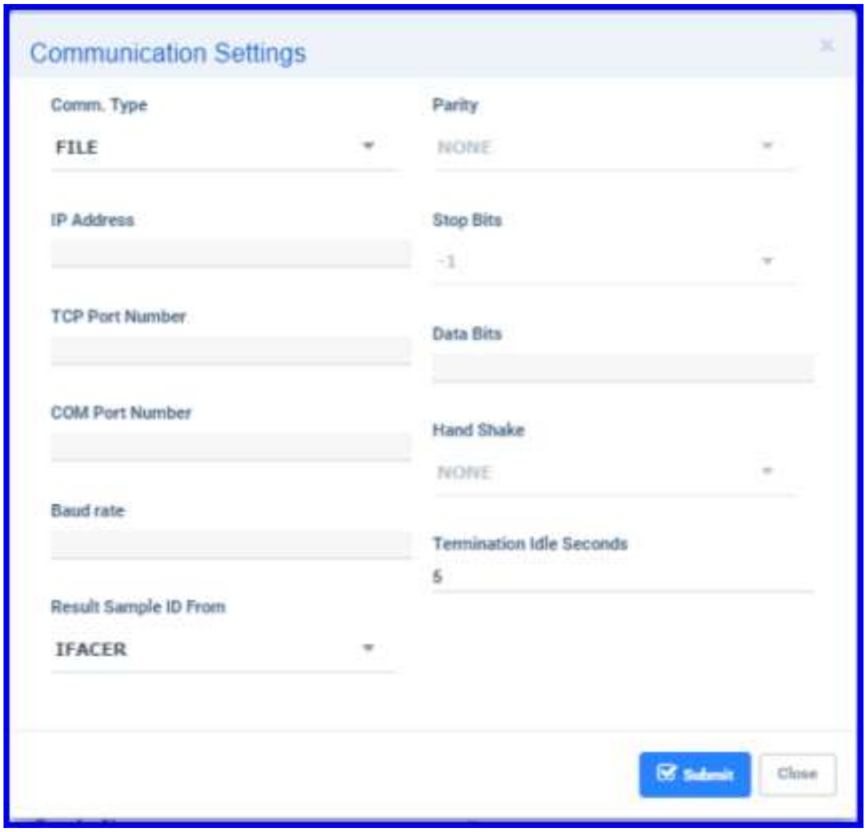


FIGURE: 26 - Communication Setting Dialog

14. In the Communication Setting dialog, in the **Comm. Type** box, select the communication type.

The communication type can be any one of the following:

TCP _Client Or TCP_Server : The instrument acts as client / server. If you select TCP _Client Or TCP_Server as communication type, then specify the IP Address of the instrument and the port number in the respective fields.

RS232 : If you select RS232 as communication type, then select/type value for Com Port Number, Baudrate, Parity, Stop bits, Data bits and Handshake as applicable.

In the **Termination Idle Seconds** box, select number of idle seconds after which the communication will be terminated with the instrument.

> ***Note:*** *Refer respective instrument manual for value ranges for Com Port Number, Baudrate, Parity, Stop bits, Data bits and Handshake fields.*

FILE : If you select FILE as communication type, then just click **Submit**.

For Data logger instrument, the **Communication Settings** dialog appears as shown in the figure:

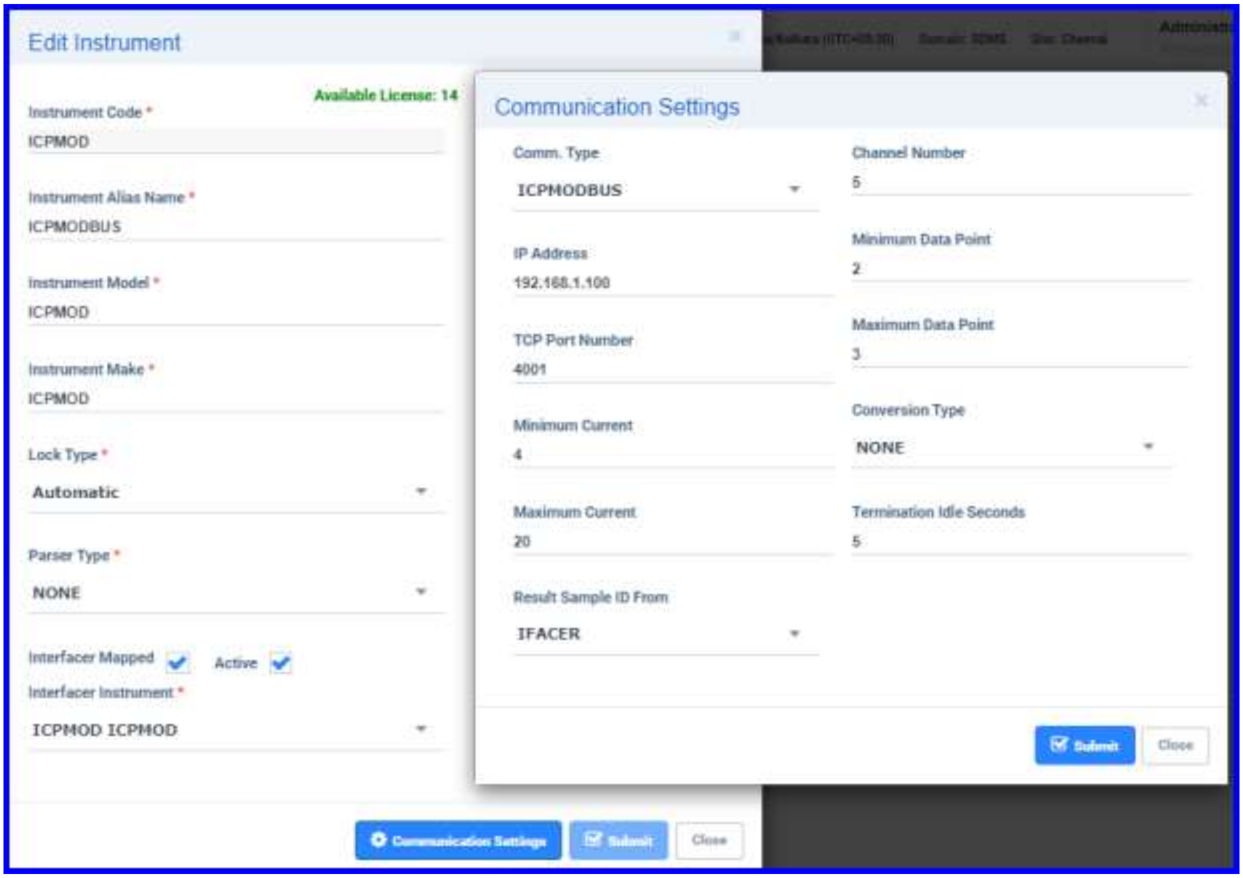


FIGURE: 26a - Communication Setting Dialog – Data Logger

15. Fill in required fields. Note that when you add an instrument, parser is not required for Data Logger instruments. Hence in the **Parser Type** field, select **NONE**.

16. Click **Submit**. You will see a confirmation message saying “Instrument Details Saved”

17. Click **Ok**.

4.3.4 Edit Instrument

To edit instrument details, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Instrument** to go to the Instrument master tab. The **Instrument** master tab appears.

2. On the **Instrument Master** screen, click to select the instrument from the list you want to edit and then click Edit. The edit instrument screen appears.

3. Do the required changes to the instrument and then click **Submit** to save the changes.

Note:

> a. *You cannot edit **Instrument Code**.*
>
> b. *You cannot deactivate an instrument if the instrument is locked. You will see a warning message saying "Currently the Instrument is locked,so cannot deactivate the instrument".*

4.3.5 Export Instrument Master to Excel

To export Instrument Master in to Microsoft Excel, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Instrument** to go to the Instrument master tab. The **Instrument** master tab appears.

2. On the **Instrument** master screen, click Export. The file Save As dialog appears.

3. In the **Save As** dialog locate the folder where you want to store the Excel file and then in the **File Name** box, type a name for the exported file.

4. Click **Submit**.

4.3.6 Retire Instrument

To retire an instrument, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Instrument** to go to the Instrument master tab. The **Instrument** master tab appears.

2. On the **Instrument** master screen, select the instrument and then click 

.

3. In the **Confirmation** dialog, click **Ok**.

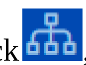
4. An **Audit Trail** screen appears for authentication. Type your password, reason and comments appropriately and then click **Submit**.

5. Click **Submit**.

Note: *You cannot retire an instrument if the instrument is locked. You will see a warning message saying "Currently this Instrument is locked, so cannot retire".*

4.3.7 Print Instrument Master

To print instrument list, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click Client to go to the Client master tab. The **Instrument** master tab appears.

2. In the **Instrument** master tab, click 

. The Print screen appears as shown in the figure:

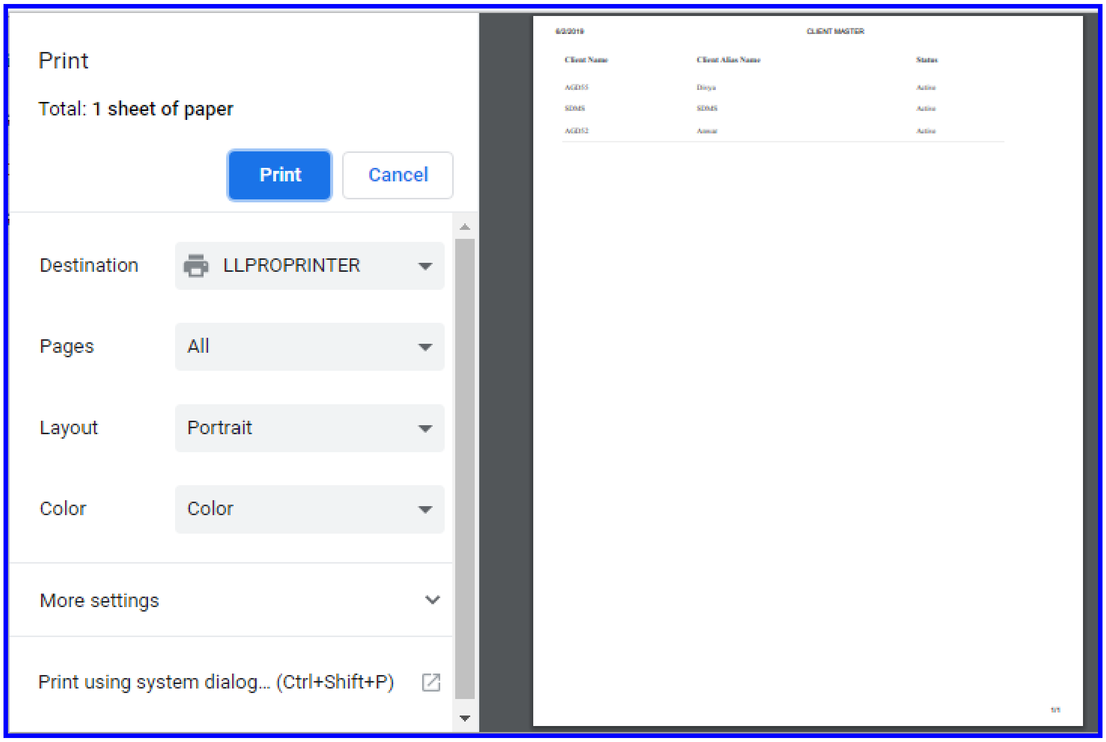


FIGURE: 27 - Print Instrument Master Dialog

3. In the **Print** dialog, you can see the print preview of the instrument master on the right side.

4. Click **Print** to print the instrument list.

4.4 Site Master

Site master enables you to add new sites and manage sites in SDMS. .

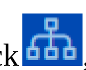
1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Site** to go to the **Site** master tab. The **Site Master** tab appears as shown in the figure:

FIGURE: 28 - Site Master Tab

The Site master tab enables you to do the following:

- Add sites
- Edit site details

4.4.1 Add Site

To add a site to the Site master, follow these steps:

1. In the **Site** master tab, click + Add. The **Add Site** dialog appears as shown in the figure:

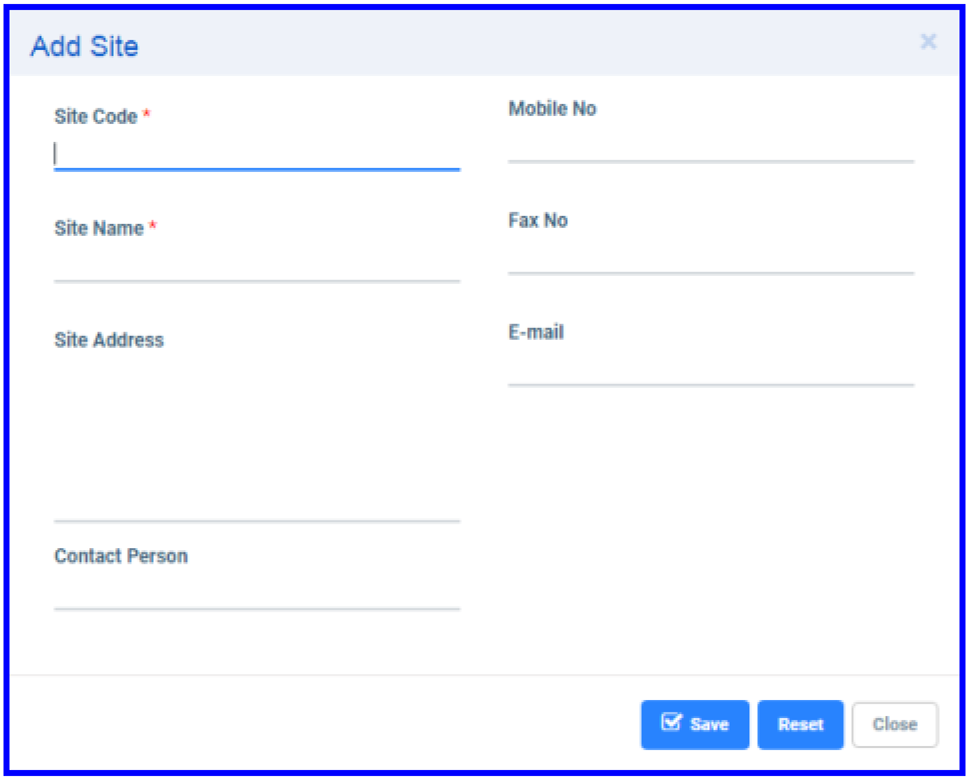


FIGURE: 29 - Add Site Dialog

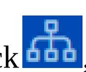
2. In the **Site Code** box, type a code for the site.
3. In the **Site Name** box, type the name of the site to add.
4. Fill in **Site Address**, **Contact Person** name, **Mobile No** of the contact person, **Fax No**, **Email** boxes as applicable.

Note: *Before you save the site if required, click* ***Reset*** *to clear all fields for fresh entry.*

5. Click **Save**.

4.5 Edit Site Details

To edit site details, follow these steps:

1. On the main menu, click , and then click **Base Masters**. The **Base Masters** screen appears. Click **Site** to go to the site master tab.
2. In the **Site** master tab, click to select the site from the list you want to edit and then

click Edit. The **Edit Site** screen appears.

***Note:** You cannot edit **Site Code**.*

3. Do the required changes to the site details and then click **Save** to save the changes.

4.6 Template and Tags

Templates are created and managed to capture files in a customized structured manner in SDMS. When files are uploaded the pre tagged, templates enables automatically group, store and retrieve files easily. In templates you structure data by creating tags and group them in hierarchy.

Template Tags enable association of meta data to records captured which in turn used to search related records.

To setup templates, follow these steps:

1. On the main menu click , and then click **Template and Tags**. The screen appears as shown in the figure:

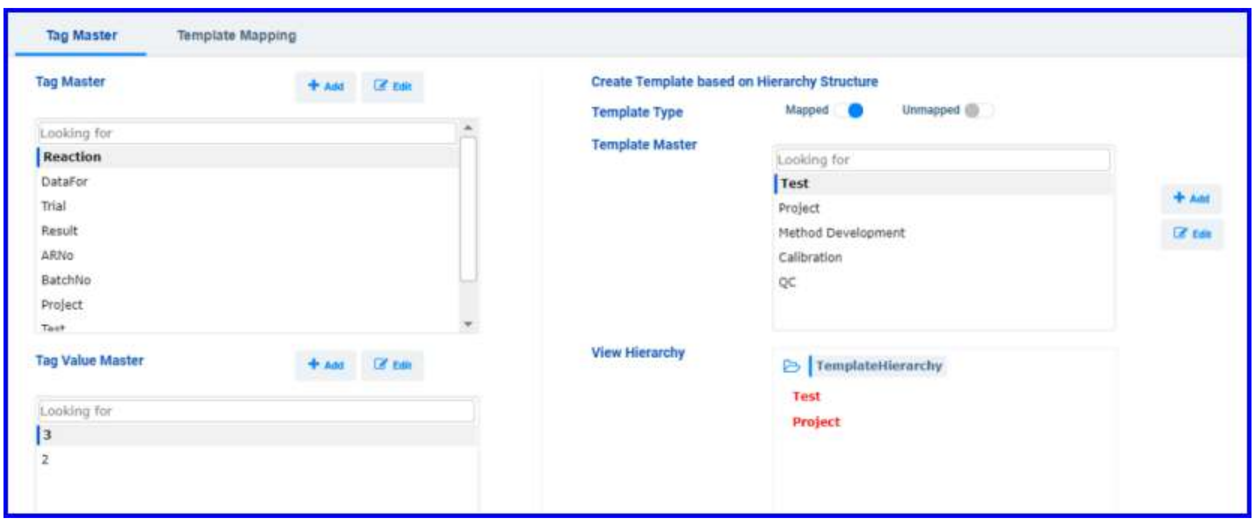


FIGURE: 30 - Template and Tags Screen

Creating a template consists of the following steps:

4.6.1 Step I: Create Tags and Add Values to Tags

Tags are basic components of a structure and define meaning of any data. So you create a tag and add values to the tags. For example: Test is a tag and all the test types are added as tag values to the test as shown in the figure:

To create a tag, follow these steps:

1. In the **Tag Master** tab, under Tag Master, click + Add. In the **Tag Name** box, type the tag name and then click **Submit**. As shown in the figure:

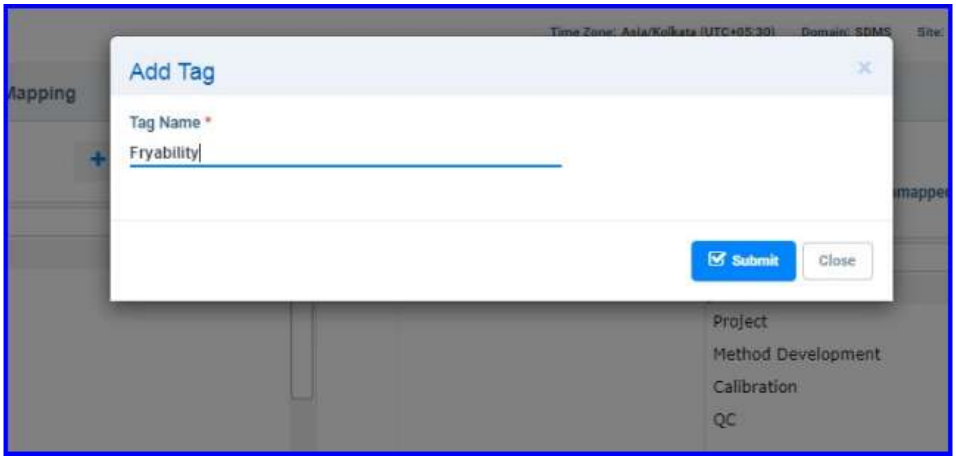


FIGURE: 31 - Tag Master Tab

***Note**: If the tag is assigned with Values then it becomes Master Tag and allows selection of predefined values as dropdown. If the Tag is not set with values then it behaves as User Input tag and user can input the values during transaction.*

2. Once you add tags, you need to add tag values to the same. In the **Tag Master**, select the tag you want o add values and then under **Tag Value Master**, click + Add. The **Add Tag Value** dialog appears as shown in the figure:

FIGURE: 31a – Add Tag Value

3. In the **Tag value** box, type the tag value and then click **Submit**. Same way, you can add multiple values to a tag. All the values appear as dropdown list in the transaction.

Note: *Only Tags with tag values appear in the Hierarchy Structure and Template Master screen.*

*For **Mapped** templates you can define the hierarchy in the Hierarchy tab and add values in the Template Master tab. Tags added in the hierarchy will become mandatory tags in the template. One-to-many relations can be defined to the Master Tags by defining Mapped Tag structure.*

*For **Unmapped** templates, you cannot define the hierarchy. But you can add tags in the Template Tags tab. These tags are not mandatory tags and become additional/optional tags in the template. Unmapped tags display full list independently for selection, unlike mapped tags with one-to-many relation. To more details about templates, refer Creating Templates.*

4.6.1.1 Editing Tag Name

1. To edit a tag name, under **Tag Master**, select the tag name to edit and then click **Edit** as shown in the figure:

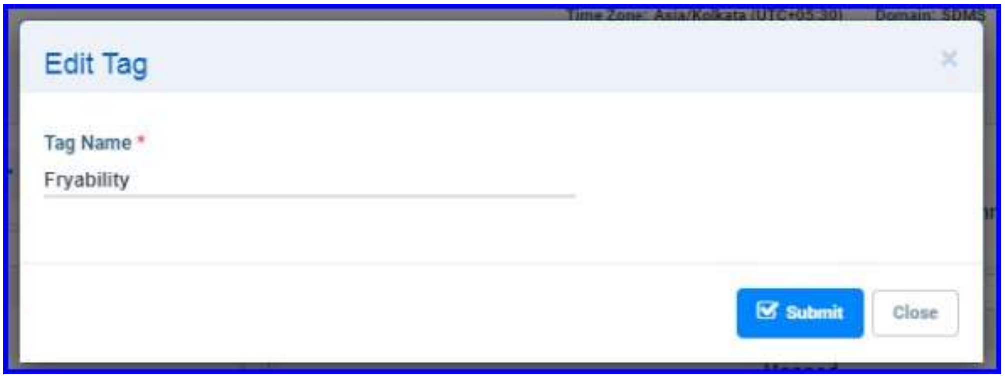


FIGURE: 32 - Editing Tag Name

2. The tag selected for edit appears in the **Edit Tag** dialog. Do required changes and then click **Submit** as shown in the above figure. A confirmation message saying "*Tag Name Updated Successfully*" appears.

4.6.1.2 Editing Tag Value

1. To edit tag value, under **Tag Value Master**, select a tag value and then click **Edit. The Edit Tag** Value dialog appears as shown in the figure:

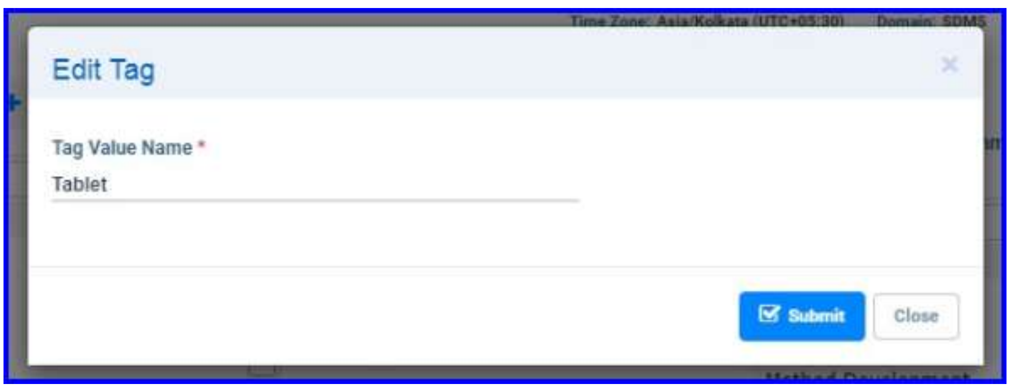


FIGURE: 33 - Editing Tag Value

2. The tag value selected for edit appears in the **Edit Tag** Value dialog as shown in the above figure.

3. Edit the tag value and then click **Submit**. A confirmation message saying "*Tag Value Updated Successfully*" appears.

4.6.2 Step II: Create Template

1. In the **Template and Tags** screen, The Template Master section appears as shown in the figure:

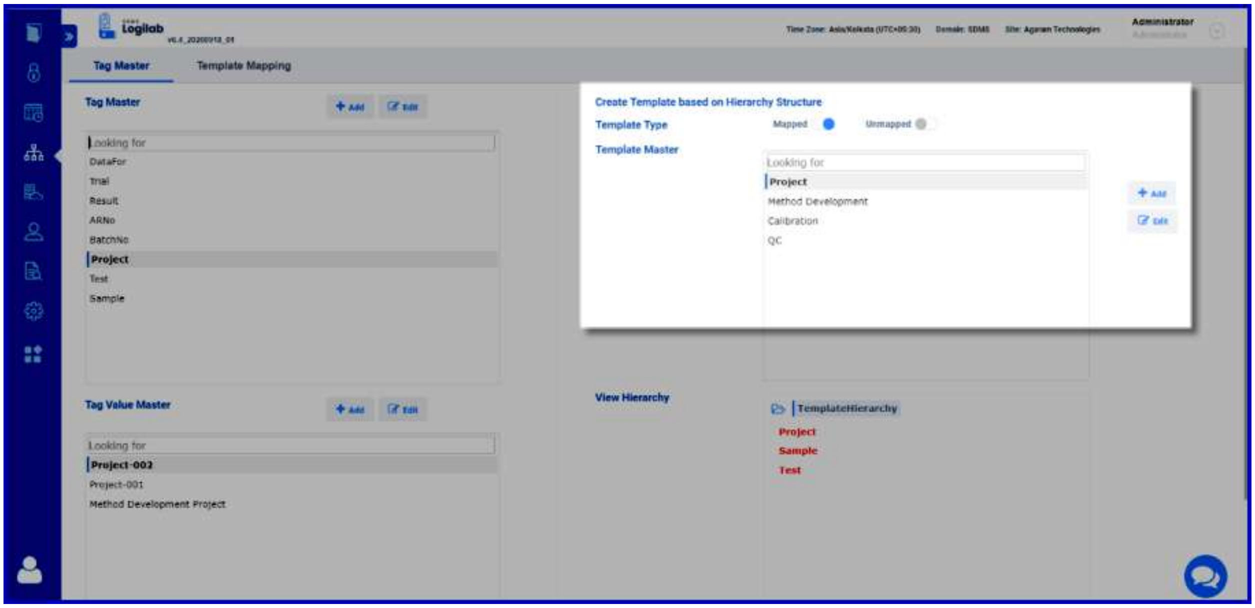


FIGURE: 34 – Template Master Section

Here you create a structure using tags in hierarchical order. For example, Sample is the first level and Test is the second level in the hierarchy. Before you create a structure you must specify the type of the template: Mapped/Unmapped.

- For **Mapped** templates you can define the hierarchy and add values in the Template Master. Tags added in the hierarchy will become mandatory tags in the template. One-to-many relations can be defined to the Master Tags by defining Mapped Tag structure.
- For **Unmapped** templates, you cannot define the hierarchy. But you can add tags to the Template Tags. These tags are not mandatory tags and become additional/optional tags in the template. Unmapped tags display full list independently for selection, unlike mapped tags with one-to-many relation.

To create a template, follow these steps:

2. Define the template type by selecting **Mapped** / **Unmapped**.
3. In the **Template Name** box, type a name for the template and then click **+ Add**. The Add Template dialog appears as shown in the figure:

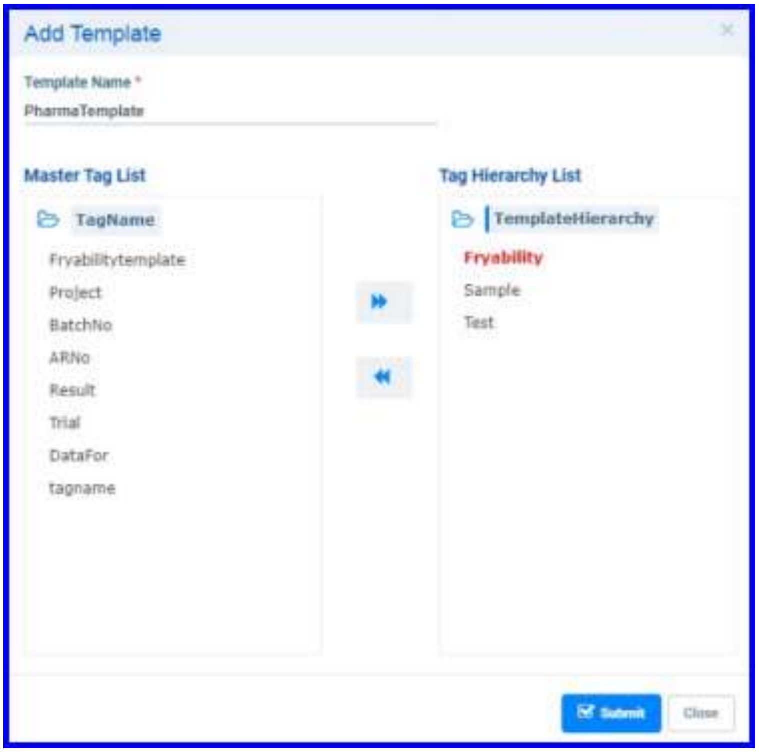


FIGURE: 34a - Add Template

4. Do any one of the following:

   - For **Mapped** template: Under **Master Tag List**, select a tag value and then click . The tags are moved to the right side and appear in hierarchy as moved in the same order as shown in the above figure. The mapped template has a mandatory tag and appears in red as shown.

   - For **Unmapped** template: You cannot define the hierarchy hence, click **Save** to save the template.

5. Click **Save**. You can see a confirmation message saying “ *Template Name Saved Successfully*”

Note: *The templates you created here are listed in the Template Name box in the Template Mapping tab with Fields in defined hierarchy to assign one- to- many relational values.*

Once you create a template, you can set values to the tags in the template. To do so, follow these steps:

1. In the **Template and Tags** screen, go to the **Template Mapping** tab. The tab appears as shown in the figure:

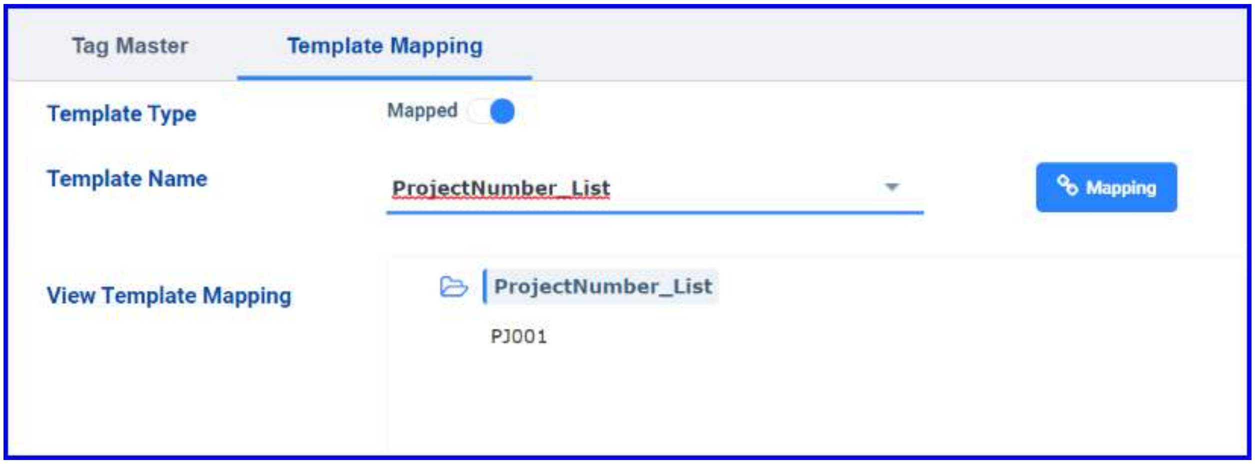
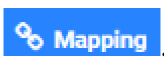


FIGURE: 34b - Template Mapping Tab

2. In the **Template Mapping** tab, In the **Template Name** box, select the template. Templates that you created in the Tag Master tab are listed here.

3. Click 

. The **Configure** dialog appears as shown in the figure:

4.6.3 Step III: Set Template Value

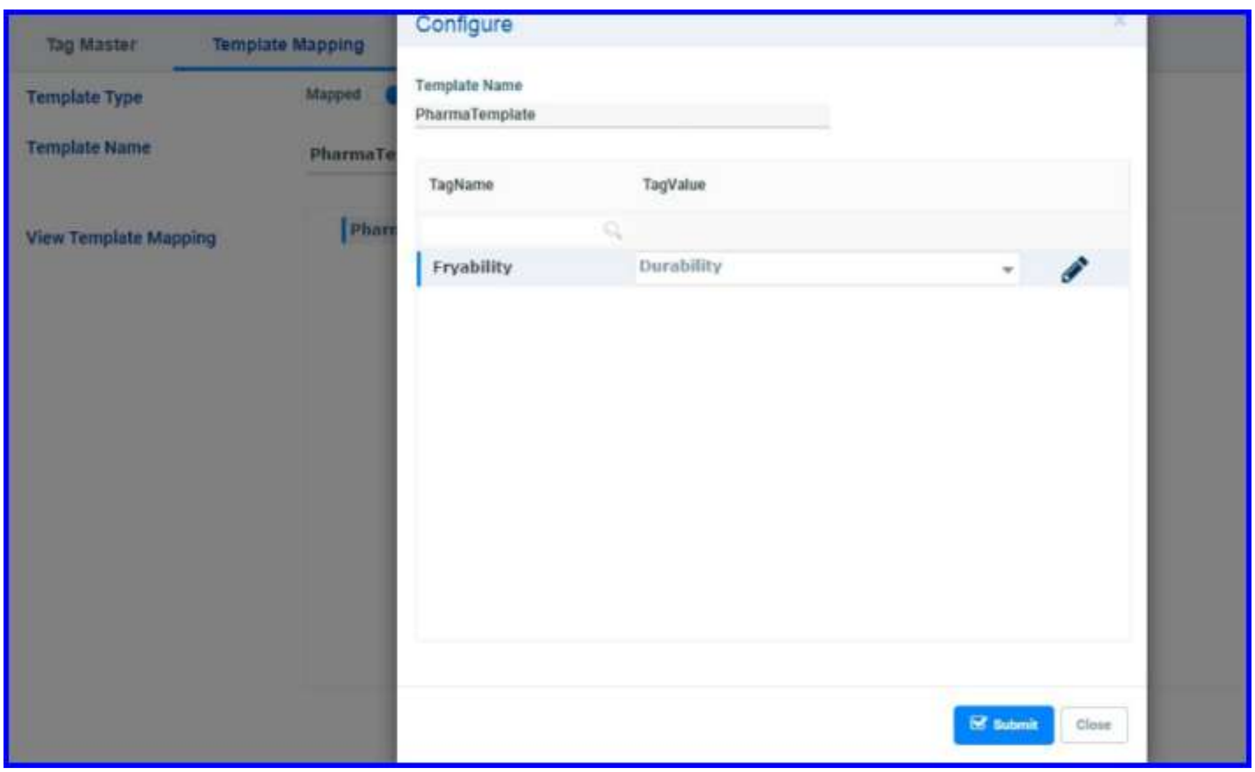


FIGURE: 35 – Template Mapping Tab – Configure Dialog

1. List of tags added to the template appears on the left side. Values added to the tags appear instead of the tag names.

2. Under **TagValue**, select the value for the tag. List of tag values appears for the selected tag.

3. Click **Save**. You will see a message saying "Template value saved successfully".

4. Same way you can add more values for the selected tag in the template. After you add values to the tags in the hierarchy in the Template Master tab, you can see the tree view of the tags and tag values as shown in the figure:

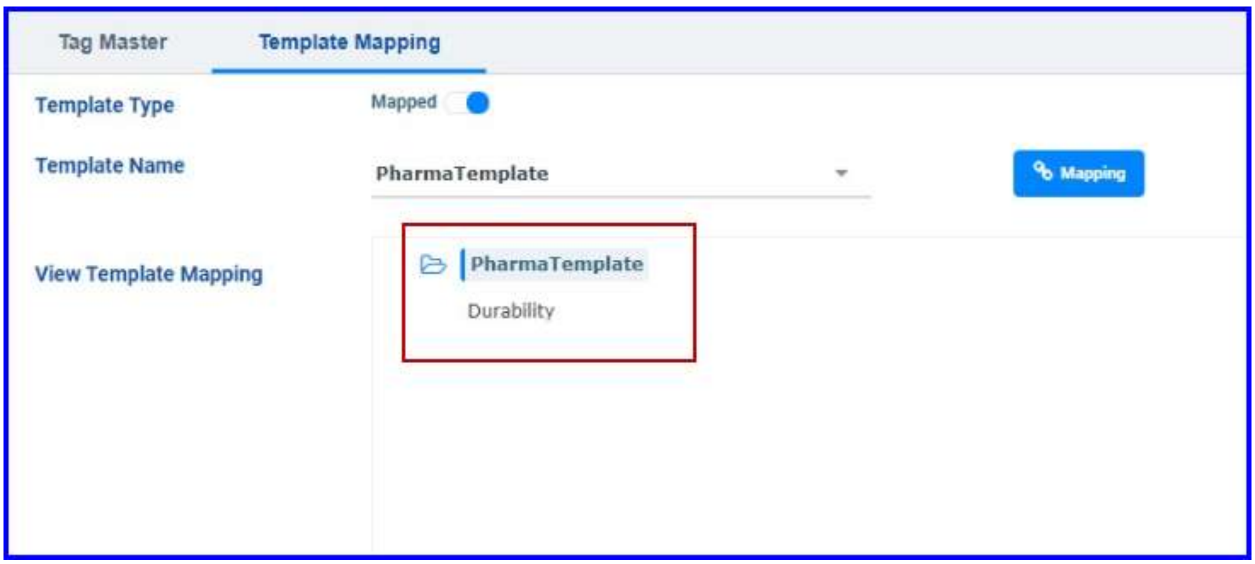


FIGURE: 36 - Tree view of Tags and Tag Values in the Template Mapping Screen

Unmapped templates do not have mandatory tags; hence, you cannot see tags. Additional tags added in the Template Tags tab appears in the Instrument Lock screen.

5 FTP Configuration

Logilab SDMS uploads files captured from the instruments using FTP. The FTP Configuration menu enables you to create server/disk space and configure the same for file upload. This process consists of the following three steps:

- Server Configuration
- Drive Configuration
- FTP Configuration

5.1.1 Server Configuration

Here you set the server machine for file upload. You need to select the server name and the OS and then provide valid username and password for the server machine access. You can create an active or passive server. However, you can update the status of the server later.

1. On the main menu click , and then click **FTP Configuration**. By default, the **Server Configuration** tab appears as shown in the figure:

FIGURE: 37- FTP Configuration – Server Configuration Tab

5.1.1.1 Add Server Configuration

To add a Server Configuration, follow these steps:

2. In the **Server Configuration** tab, click **+ Add**. The **Add Server Configuration** dialog appears as shown in the figure:

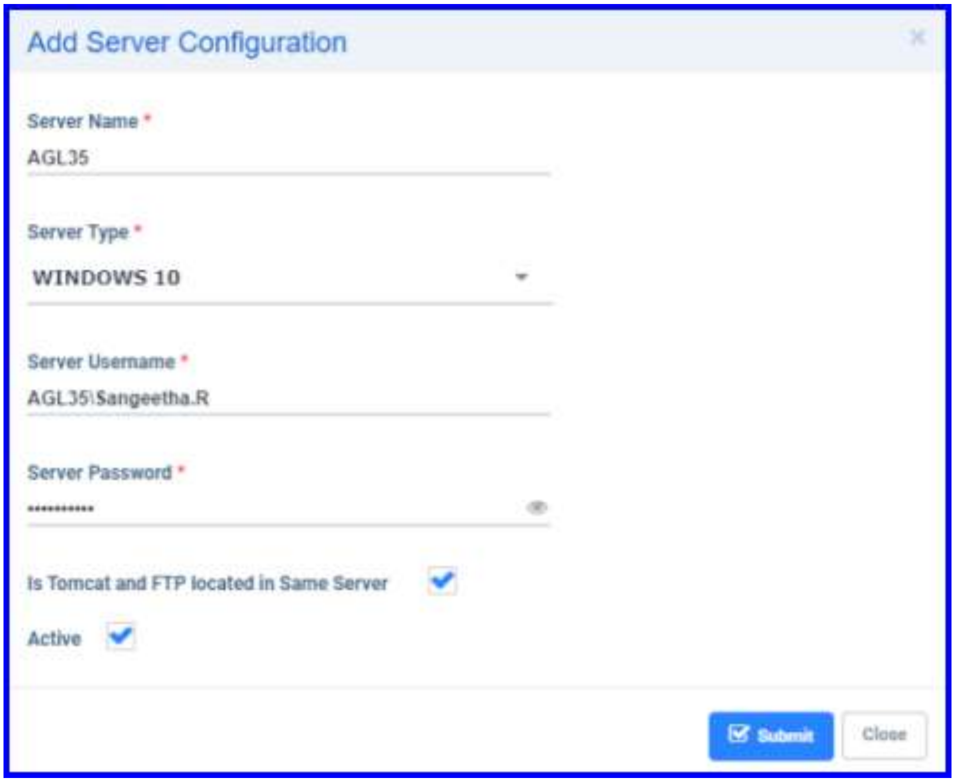


FIGURE: 38 - Add Server Configuration Tab

3. In the **Server Name** box, Type the PC name that you want to use as server.

Note: *If in a network, list of computer names that are connected to the network appears here. In that case, you can select the computer from the list.*

4. From the **Server Type** box, select the OS name of the server. The server machine may have been installed with dual OS. So you need to mention the OS for the selected server.

5. In the **Server Username** box, type the user name for the server.

6. In the **Server Password** box, type the password.

Note: *You need to provide valid user name and password that you use to login to the server machine. The same user credentials are validated in the IIS while setting up FTP. Click here to see more information on [IIS and Setting up FTP](#).*

7. Click to select **Is Tomcat and FTP located in Same Server** check box if the Tomcat and FTP servers are configured in the same machine.

8. Click to select the **Active** check box to make this server active.

9. Click **Submit** to save the server configuration.

***Warning! :** If you click **Close** before saving will close the FTP Configuration screen without saving the configuration.*

5.1.1.2 Edit Server Configuration Details

1. In the **Server Configuration** tab, select the configuration you wish to update and then click 

. The **Edit Server Configuration** dialog appears. Update the configuration details and then click **Submit** to save the changes.

***Note:** You cannot edit **Server Name**.*

5.1.2 Drive Configuration

Here you select the drive where you can create folders/directories for file upload. Select the server and then select the drive path in the selected server.

1. On the **FTP Configuration** screen, click **Server Drive Configuration** tab. The **Server Drive Configuration** tab appears as shown in the figure:

FIGURE: 39 - Server Drive Configuration Tab

5.1.2.1 Add Drive Configuration

To add a Drive Configuration, follow these steps:

1. In the **Server Drive Configuration** tab, click 

. The **Add Server Configuration** dialog appears as shown in the figure:

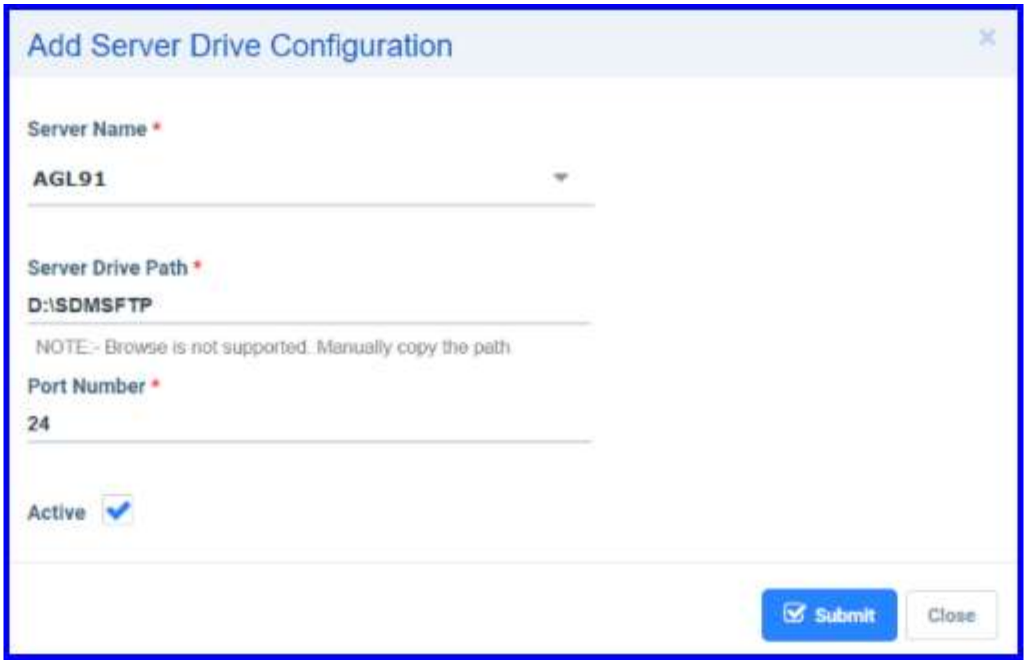


FIGURE: 40 - Add Server Drive Configuration Tab

2. From the **Server Name** box, select the server name you want to create the disk /drive space.

***Note**: Servers that you added in the Server Configuration tab will appear in the Server Name box. Select a server from the list.*

3. In the **Server Drive Path** type the path of the site that you created in IIS. For example if you have created C:\SDMSFTP Site in IIS, then type the same path here. Or copy and paste the path manually.

4. In the **Port Number** box, type the port number for the drive selected.

5. Click to select the **Active** check box to make this drive configuration active.

6. Click **Submit**.

Edit Server Drive Configuration Details

- In the **Server Drive Configuration** tab, select the drive configuration you wish to update and then click 

. The **Edit Server Drive Configuration** dialog appears. Update the drive configuration details and then click **Save** to save the changes.

***Note:** You cannot edit **Server Name**.*

5.1.3 FTP Configuration

FTP configuration is where you create directories / folders for file upload. The client machines are grouped based on the departments/ sections etc and for each group you can create a directory. For example creating a group RnD enables store files related to the RnD department/group.

Select the server and drive and then specify the directory name in the FTP Alias Name and FTP Virtual Directory Name. FTP Alias Name and FTP Virtual Directory Name can be same for the ease of identification.

1. On the **FTP Configuration** screen, click **FTP Configuration** tab. The **FTP Configuration** tab appears as shown in the figure:

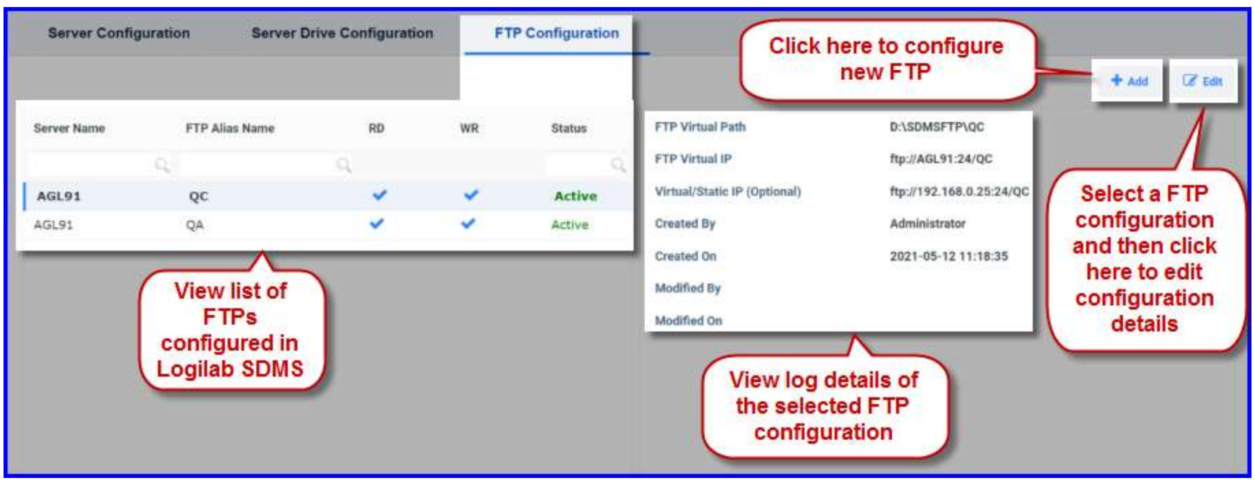


FIGURE: 41 - FTP Configuration Tab

5.1.3.1 Add FTP Configuration

To add FTP Configuration, follow these steps:

1. In the **FTP Configuration** tab, click + Add. The **Add FTP Configuration** dialog appears as shown in the figure:

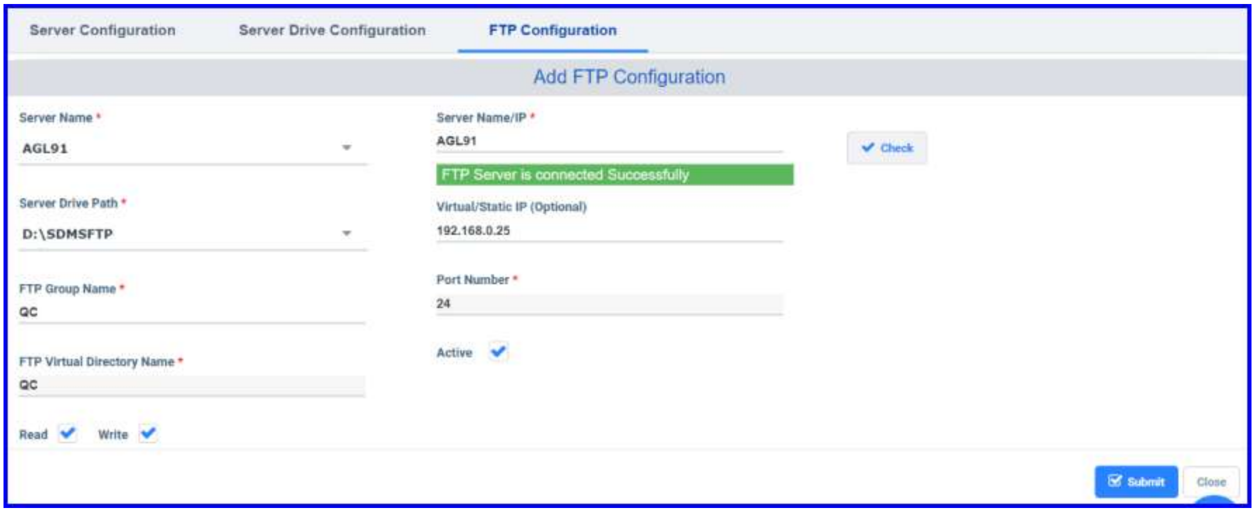


FIGURE: 42 - Add FTP Configuration Tab

2. From the **Server Name** box, select the server name you want to create the directory.
3. In the **Server Drive Path** box select the drive where you want to create the directory. For example if you have created C:\SDMSFTP Site in IIS, then select the same path here.
4. In the **FTP Group Name** box, type a name for the group you want to create. The system will check if the group name is available for use. If so, then you can see a message saying "*FTP Group Name Available*" in green. And the same name will appear in the **FTP Virtual Directory Name** box as shown in the above figure. Or you will see a message saying "*FTP Group Name Already Allocated*".
5. By default, the **Read** and **Write** options are enabled. If you want, you can disable any of these options as required.
6. In the **Server Name / IP** box, the name or IP address of the server machine appears.
7. In the **Virtual/Static IP (Optional)** field, type IP address of the server.
8. In the **Port Number** box, type the port number that you allotted in the IIS while creating the FTP site for the drive selected.
9. Click to select the **Active** check box to make this drive configuration active. However, you can change the status later.
10. Click **Check**. This checks if the FTP path mentioned is accessible and verifies if the read and write permission for the given path is valid.
11. Click **Submit**.

Note: *Grouping client machines activity is done in the scheduler screen. Though you can create a new group in the FTP Configuration screen, you can group clients and map file upload only in the scheduler screen. Click here to know more about [Scheduler.](#)*

5.1.3.2 Edit FTP Configuration Details

- In the **FTP Configuration** tab, select the FTP configuration you want to update and then click Edit. The **Edit FTP Configuration** dialog appears. Update the configuration details and then click **Save** to save the changes.

5.2 FTP Rights

You can define access rights to the user groups to view FTP directories. To do so, follow these steps:

1. On the main menu click **,** and then click **FTP Rights**. The **FTP User Mapping View** screen appears as shown in the figure:

FIGURE: 43 - FTP User Mapping View Screen

2. You can see list of FTP locations available.

3. Select an FTP location from the list to map users and then click Mapping. The **FTP User Mapping Entry** screen appears as shown in the figure:

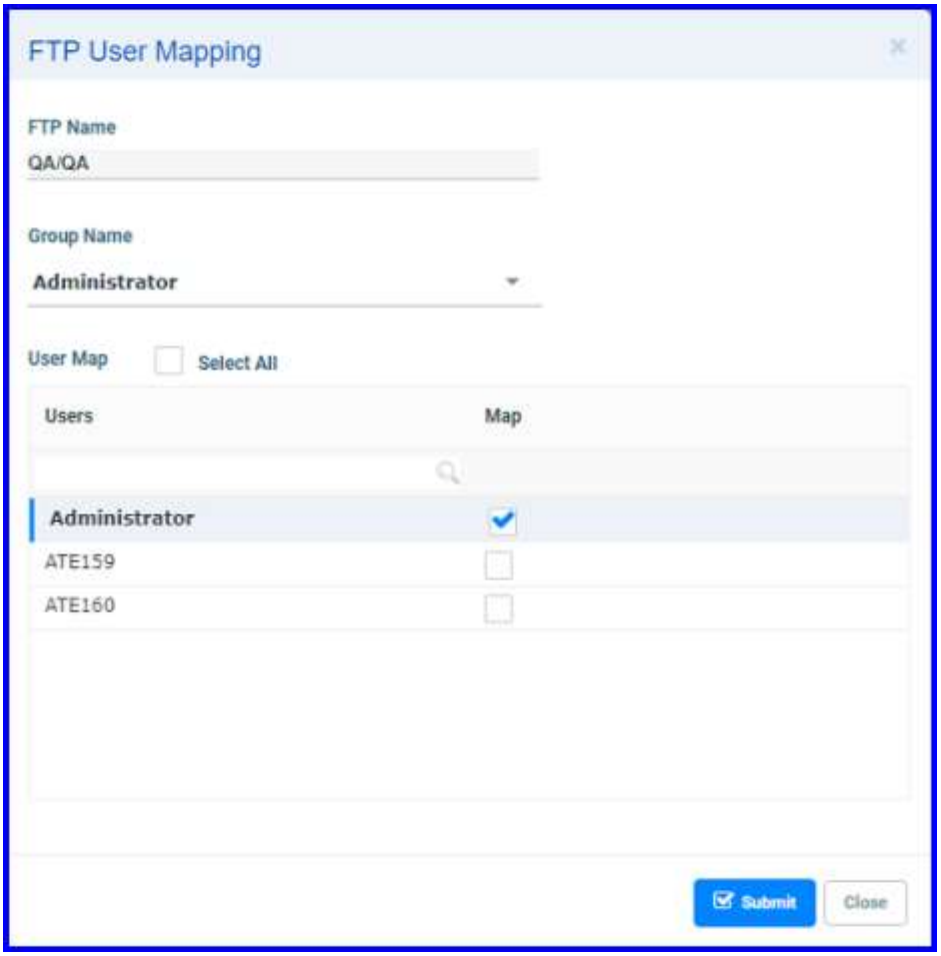


FIGURE: 44 - FTP User Mapping Entry Screen

4. In the **FTP Name** box, the selected FTP directory appears.
5. In the **Group Name** box, select the user group you want to map to the FTP directory.
6. Now you can see the selected user group under **User Map**. Click the check box under **Map** to select individual user to map. To map all the users in the selected user group, click to select the **Select All** check box.
7. Click **Submit**. Users selected from the user group are mapped to the selected FTP directory.

- In the FTP User Mapping View screen, click **Export** to export FTP locations to Excel.
- Click **Print** to print FTP location details.

6 Scheduler

6.1 Create a Schedule

The Data Scheduler screen helps you to create a schedule for file upload. For this you have to setup the file path, client and instrument.

1. On the main menu, click , and then click **Data Scheduler**. The Data Scheduler screen appears as shown in the figure:

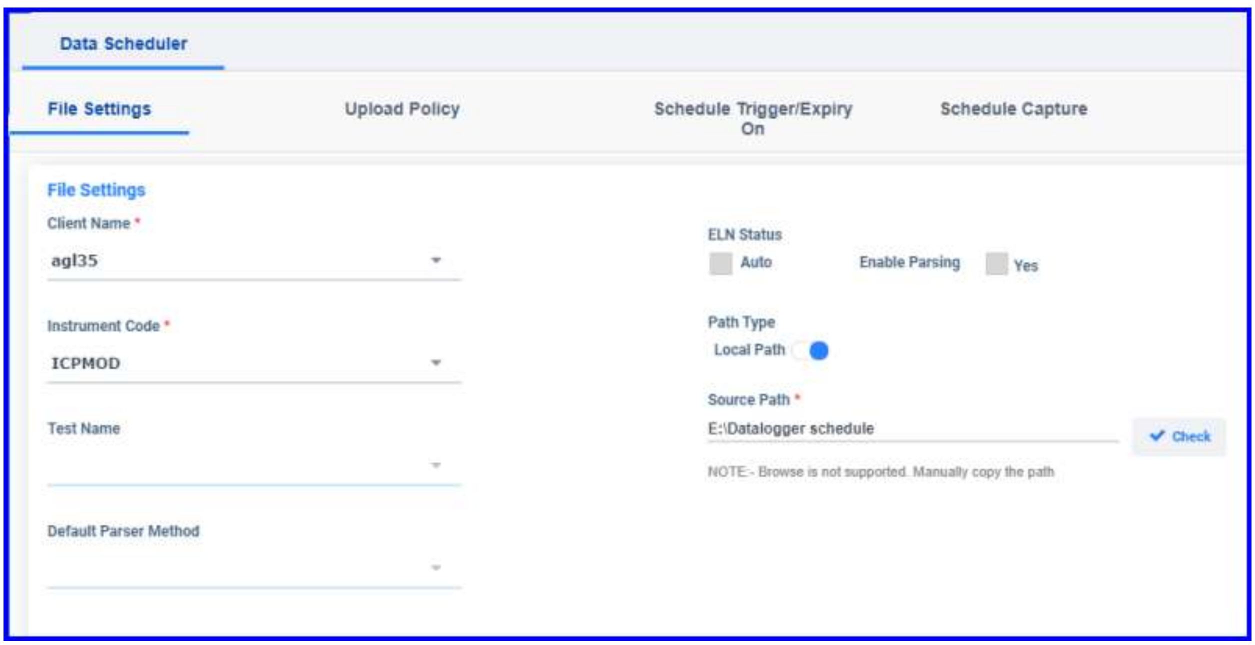


FIGURE: 45 - Data Scheduler Screen

The Scheduler screen is designed in a way to scroll down to fill up required details. Alternatively, you can also click the tabs to jump to the respective topics.

Creating a schedule consists of the following steps:

6.1.1 Setup File

6.1.1.1 Setup File, Client, Instrument, Test and Method for schedule

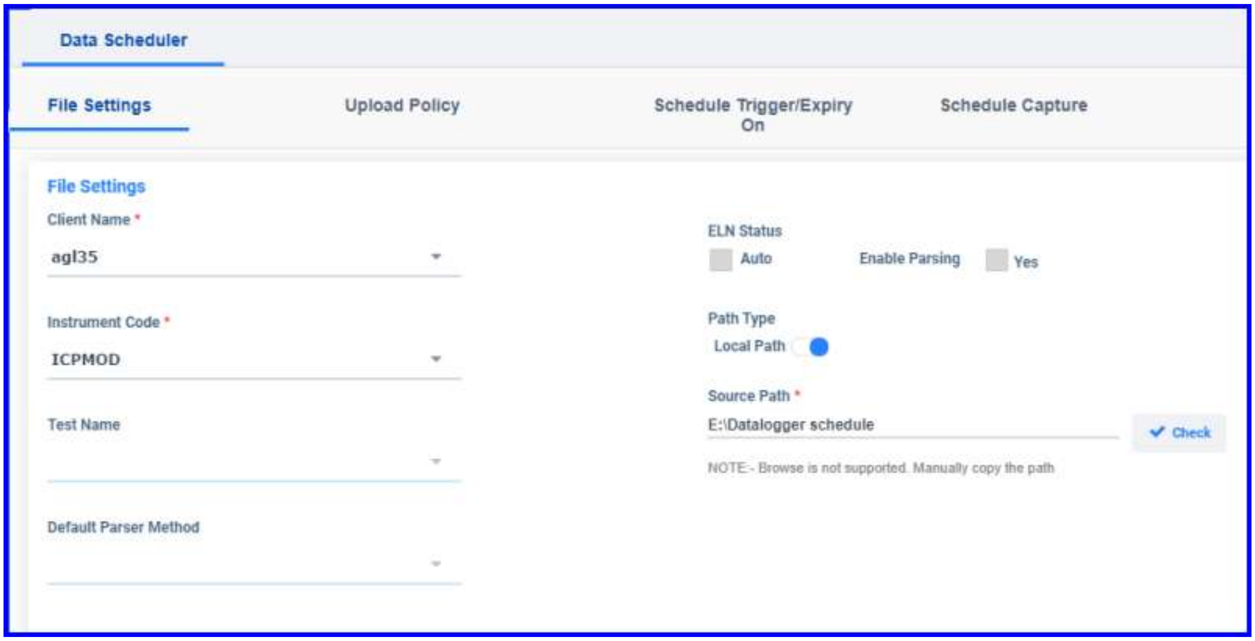


FIGURE: 46 - File Settings

2. In the **Client Name** box, select the client. Client machines that are added to the Client Master are listed here. You can choose the client for which you want to create a schedule.

3. In the **Instrument Code** box, select the instrument. Instruments that are mapped to the selected client are listed. You can choose the instrument for the schedule.

4. The **Test Name** and **Default Parser Method** fields are enabled only for ELN instruments. Based on the selected instrument, the test name and the method name for the selected test appear. Select the **Test Name** and then select the **Default Parser Method**.

5. The **ELN Status** option is enabled for ELN instruments only.

6. The **Path Type** option is enabled by default.

7. In the **Source Path** field, manually copy and paste the path that you created to store files captured from the instrument selected.

6.1.1.2 Setup Source and destination path for file upload and storage

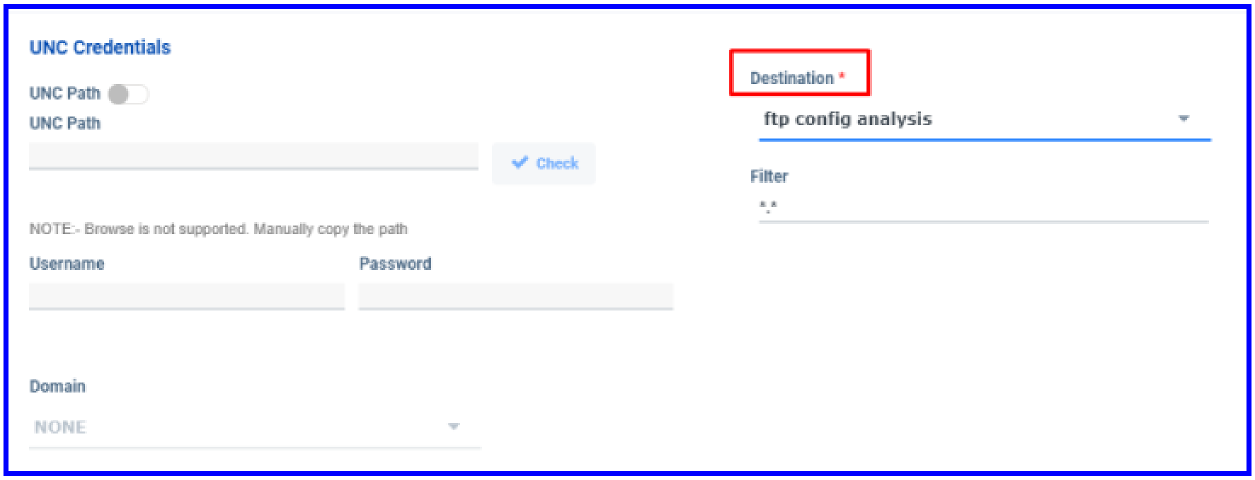


FIGURE: 47 – UNC Credentials

8. Choose any one of the path for file upload:
9. **Local Path**: Click to select **Local Path**, In the **Source Path** box, specify the location where the files are uploaded automatically in the storage server.
10. **UNC Path**: If **Source Path** is UNC path(remote computer/an instrument), then specify the path in the UNC Path box and provide valid **User Name** and **Password** for the remote computer/instrument. And then select the **Domain**. Click **Check** to verify if the given path and login credentials are valid.

Info: *Data is pulled from the UNC Path and stored in the server.*

11. In the **Destination** box, select the storage server path to upload the files.
12. In the **Filter** box, type file extensions to filter files separating with comma. For example: *.txt, *.rtf, *.tmf. Files with specified extensions alone will be uploaded. To upload all files type “*.*”.

6.1.2 Setup Backup policy

Here you specify the folder structure the scheduler has to look for files to backup. You can choose complete tree or specific levels for backup.

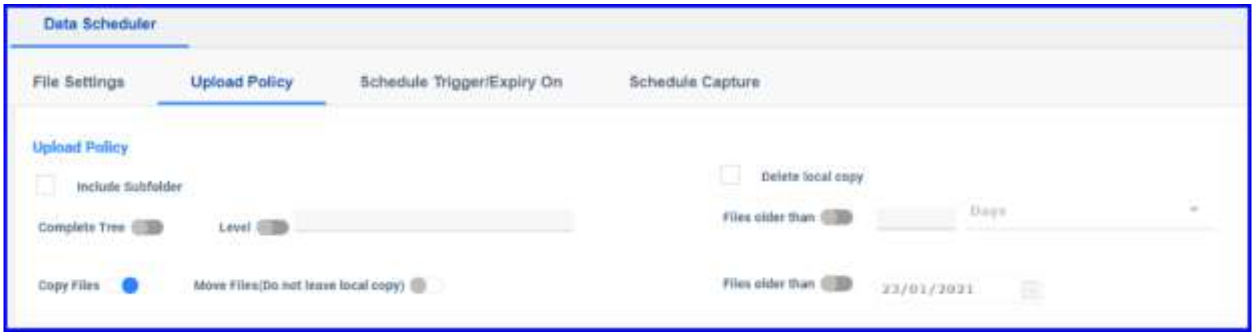


FIGURE: 48 – Upload Policy

13. Click to check the **Include Subfolder** check box and then do the following:

14. Click **Complete Tree** to instruct the scheduler to look for the files in all the levels.

15. Click **Level** and then type the level number in the box up to which the scheduler has to look for files.

16. Click **Copy Files** to copy files from the source path leaving original files unaffected.

17. Click **Move Permanently** to copy the files from the source path and delete the original files.

18. Click to enable the **Delete Local Copy** option and then specify when to delete the local copy of the files. This will delete the local copy of files on the specified date. You can also type number of days/week/months/year and specify the number.

6.1.3 Setup Backup Period

19. Click the **Trigger On** box to set the date for the scheduler to start. And set the time in the **Time** box.

20. Use the following options appropriately:

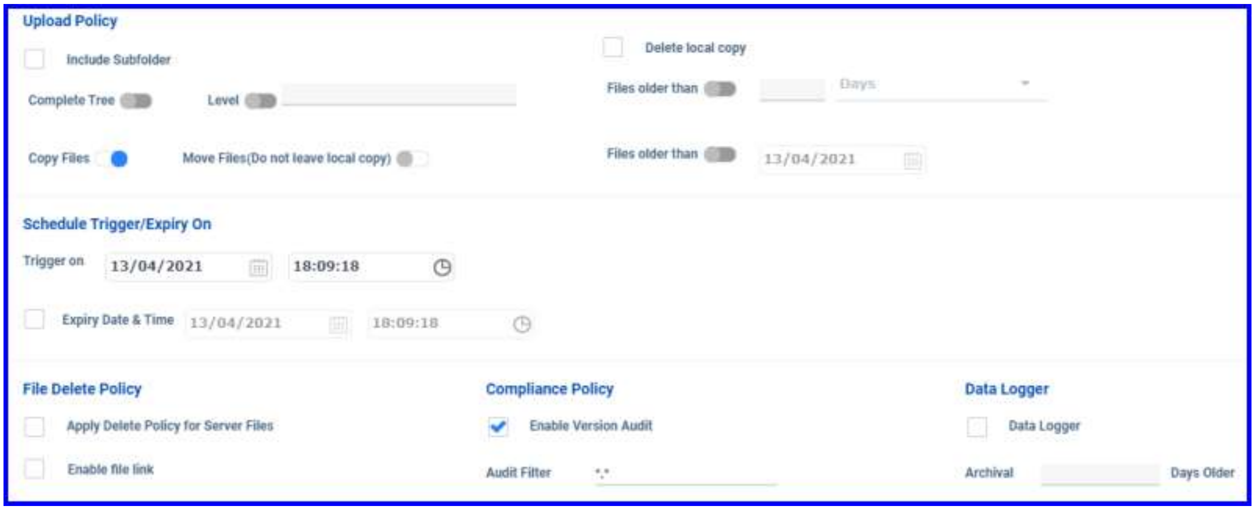


FIGURE: 49 – Setting up Backup Period – Without Data Logger

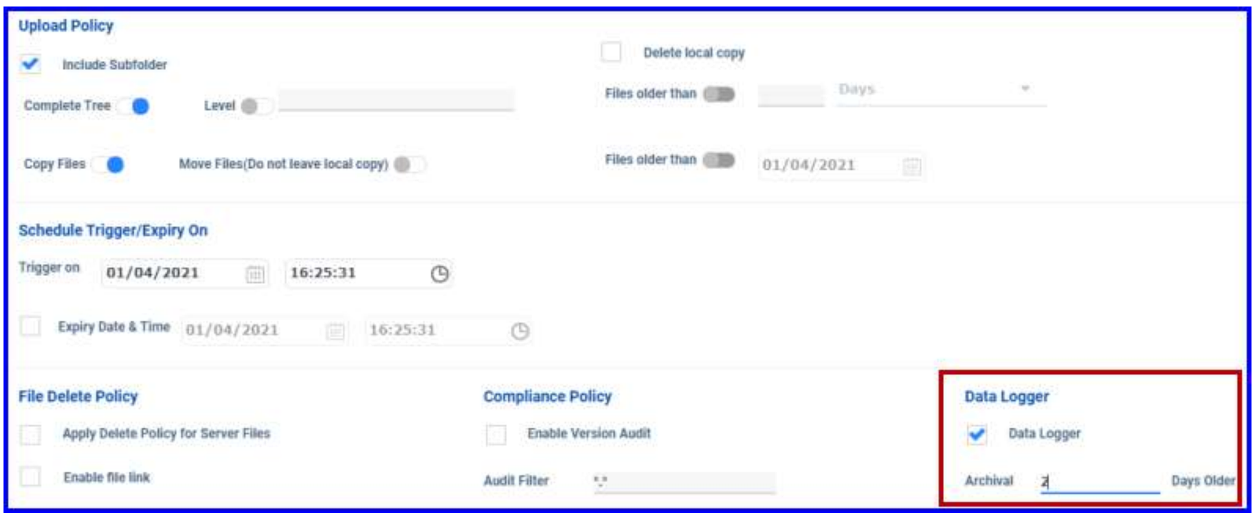


FIGURE: 49a – Setting up Backup Period – With Data Logger

21. In the **Trigger On** field, select the date and time to trigger the schedule automatically.
22. Click to enable the **Expiry Date** option to set expiry date for the schedule to expire automatically and then set date and time for the same.
23. **File Delete Policy** coordinates with delete policy defined in the system and enables to keep the bunch of latest version and delete the older versions.
24. **Apply Delete Policy for Server Files** – Enabling this option applies delete policy to the files stored in server machine also.

25. **Enablefilelink -** Enabling this option creates a link for each file uploaded in the schedule and stored in a table. User can use this link when required.

26. Under **Compliance Policy**, click **Enable Version Audit**. Enabling this option prompts for authentication from the user whenever there is a new version of the file is generated for the selected file type. In the **Audit Filter** box, type the file type to audit the specific type or type " *.* " to audit all file types. If **Enable Version Audit** is enabled, then whenever there is a new version of the file is generated the **FileAudit** screen appears enabling the user to view the version details and prompts for authentication as shown in the figure:

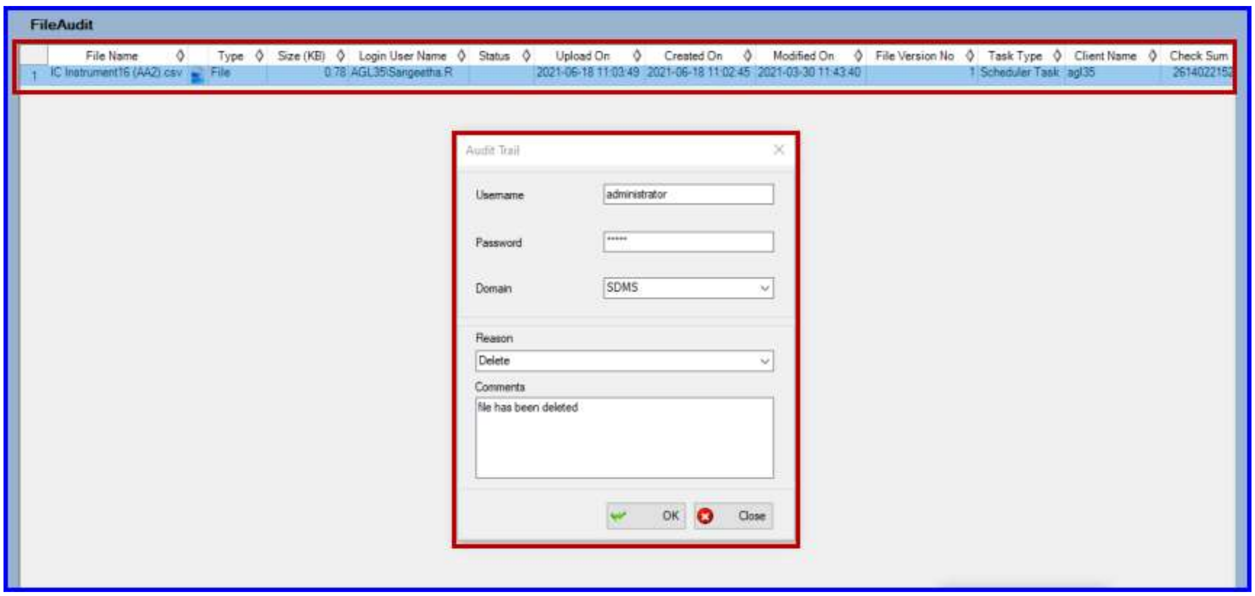


FIGURE: 49b – File Audit Screen

27. Click to check the **Data Logger** check box, to enable create log for every capture from the instrument. You can filter and view captured log in the **Data Logger** tab.

28. In the **Archival___Days Older** box, type the number of days older the files to be archived. If you type 10 days, then log files older ten days are archived. You can view the archived log files in the Data Logger tab by using the **Open Archive** option.

6.1.4 Backup Schedule

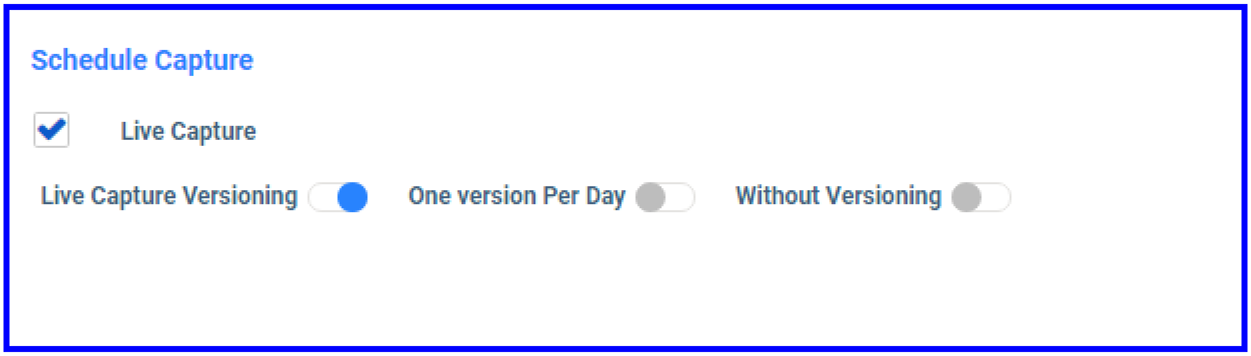


FIGURE: 50 – Schedule Capture1

29. **Live Capture** is a backup policy enables you to decide whether to maintain a live versioning system (ie. Whenever a file is updated a new version will be created) or the daily version, the final updated version will be maintained as version for the day.

- If you do not choose **Live Capture** option then **One time**, **Daily**, **Weekly & Monthly** or **Without Versioning** options can be defined for backup. This will version the file based on the option chosen.

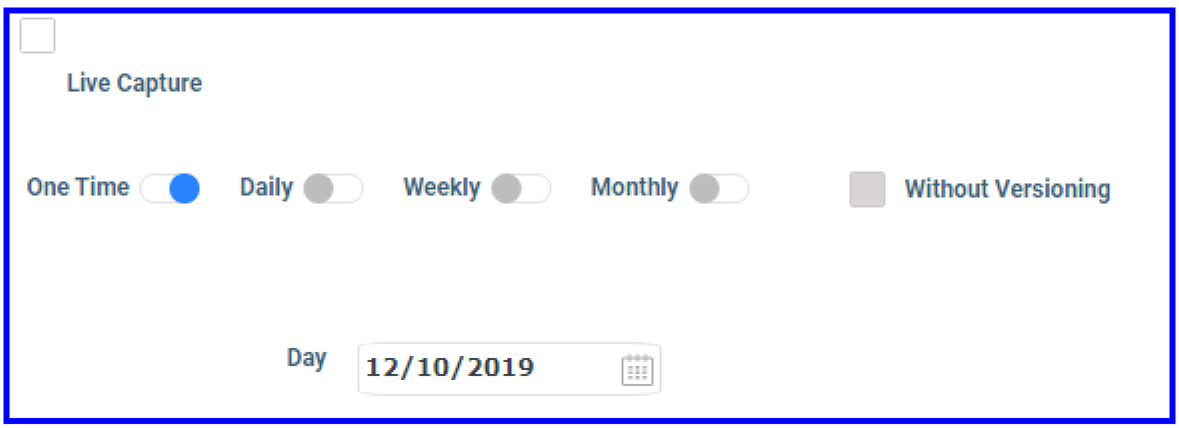


FIGURE: 51 – Schedule Capture 2

30. Click **Submit**. The scheduler will be activated on the mentioned date and time. And will be running till it expires based on the expiry policy defined.

6.2 View Edit Schedules

To edit a schedule, follow these steps:

1. On the main menu, click , and then click **View Edit Scheduler**. The View Scheduler screen appears as shown in the figure:

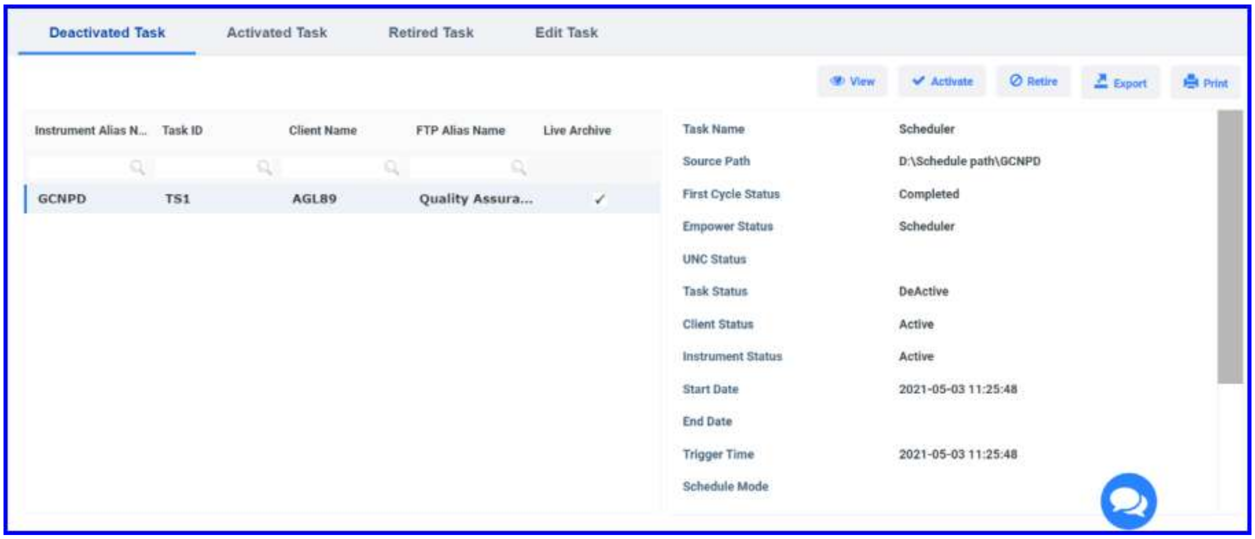


FIGURE: 52 - View Edit Scheduler Screen – Deactivated Task Tab

2. Go to the Activated Task tab to view active tasks as shown in the figure:

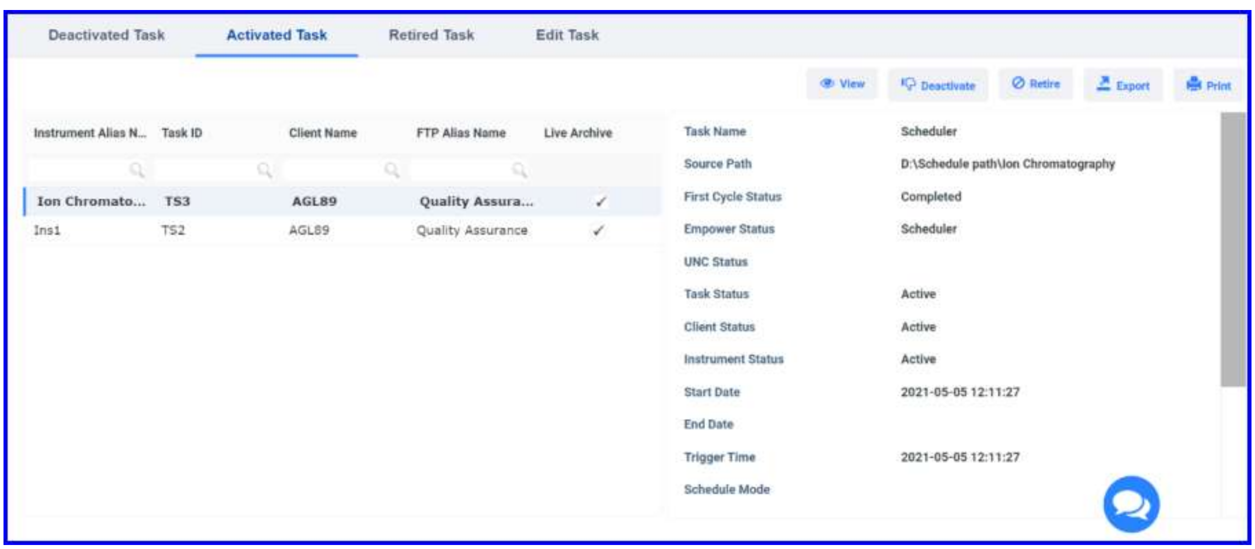


FIGURE: 53 - View Edit Scheduler Screen – Activated Task Tab

3. You can edit only a deactivated schedule. On the **Edit Task** tab, select the schedule you want to edit and then click Edit as shown in the figure:

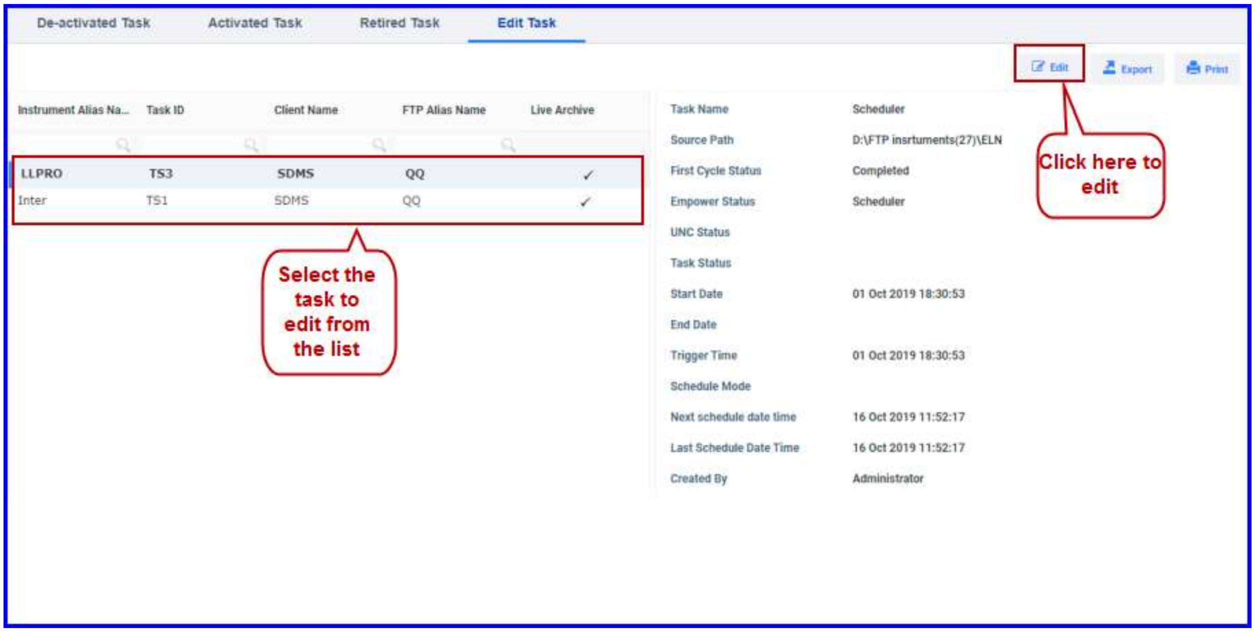


FIGURE: 54 - View Scheduler Screen-showing the Edit Task tab

Note: *To edit an active schedule, you must deactivate it and then edit. To deactivate a schedule, go to the* ***Activated Task*** *tab, select a schedule, and then click* ***Deactive****. Now the deactivated schedule appears in the* ***Edit Task*** *tab for edit.*

When you deactivate a schedule, if the schedule path is locked in the Instrument Lock screen, then you will see a warning message saying "This schedule path is already locked,so cannot deactivate this schedule"

6.3 Monitor Scheduler

Monitor Scheduler screen enables you to view schedules that are scheduled for upload and schedules that are failed to upload. You can view list of schedules queued, their priority, status etc as shown in the figure:

6.3.1 View upload schedules

To view upload schedules and failed schedules, follow these steps:

1. On the main menu, click , and then click **Monitor Schedule.**

- The **Upload Queue** appears as shown in the figure:

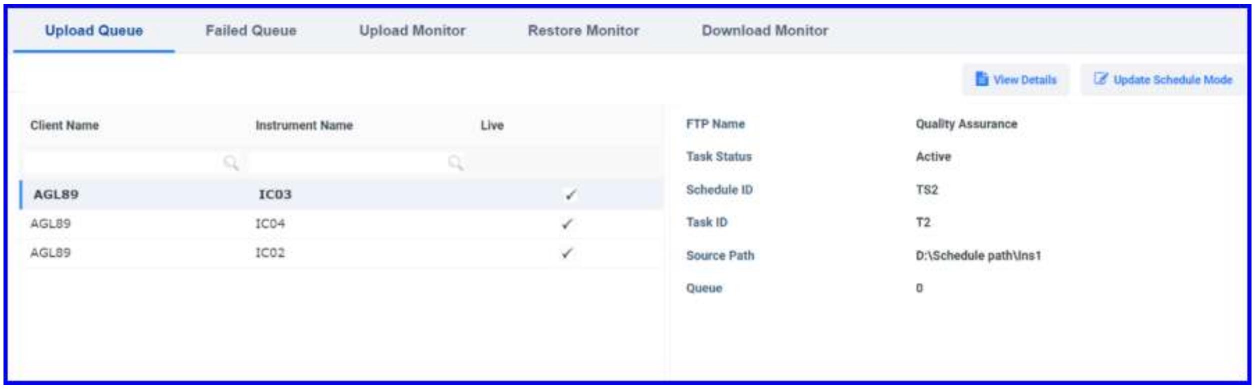


FIGURE: 55 - Monitor Schedule - Upload Queue Tab

- Click **Failed Queue** tab. Schedules that are failed to upload appears as shown in the figure:

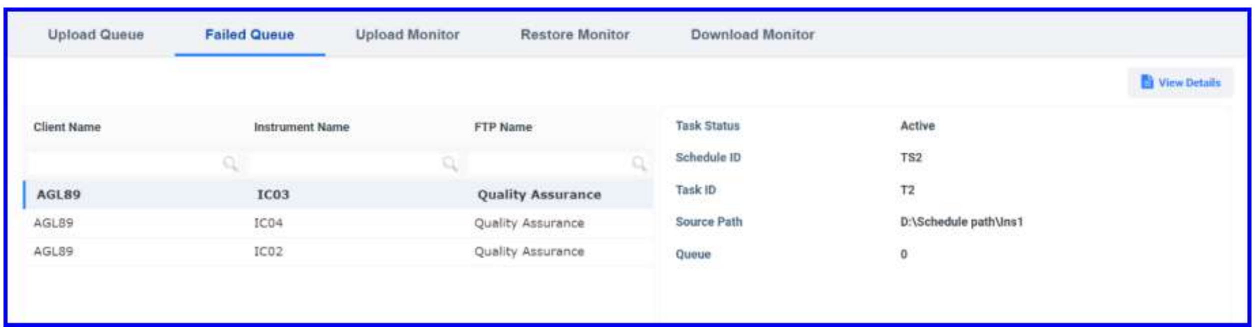


FIGURE: 56 - Monitor Schedule - Failed Queue Tab

- Click **Upload Monitor** tab. Status of the schedules appears as shown in the figure:

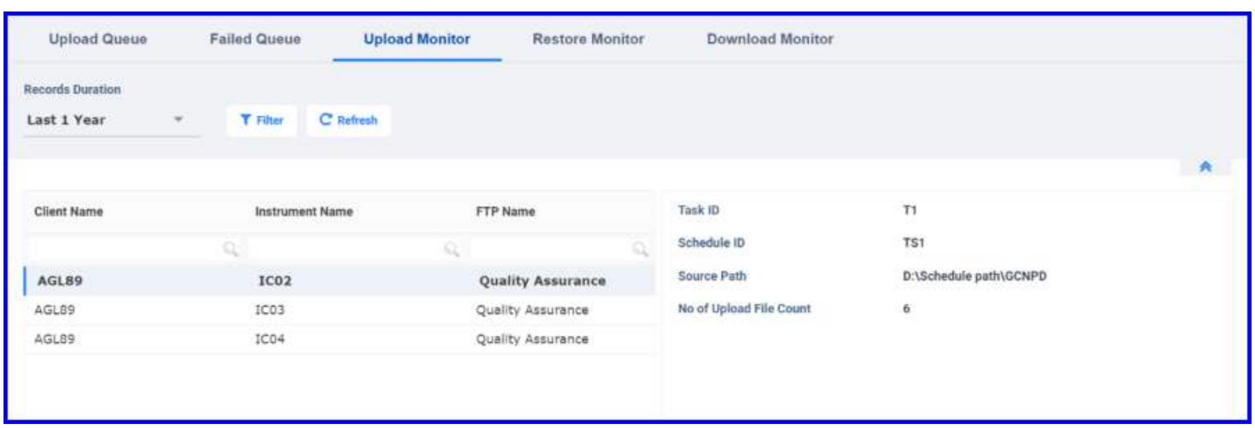


FIGURE: 57 - Monitor Schedule - Upload Monitor Tab

You can see number of files uploaded for each schedules here.

- Click **Restore Monitor** tab. Status of the schedules for restore appears as shown in the figure:

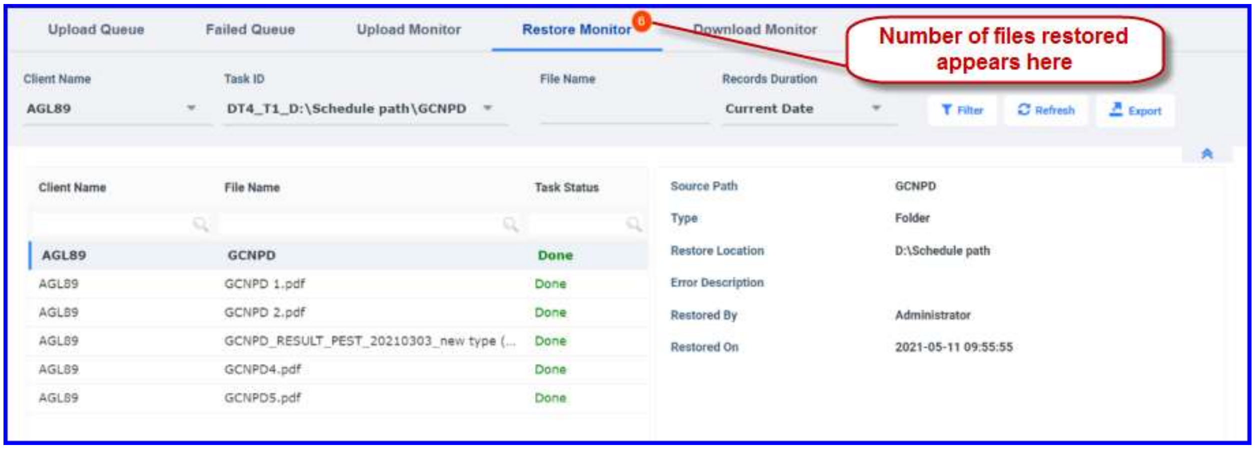


FIGURE: 58 - Monitor Schedule - Restore Monitor Tab

You can see list of files restored for each schedules here.

- Click **Download Monitor** tab. Status of the files downloaded appears as shown in the figure:

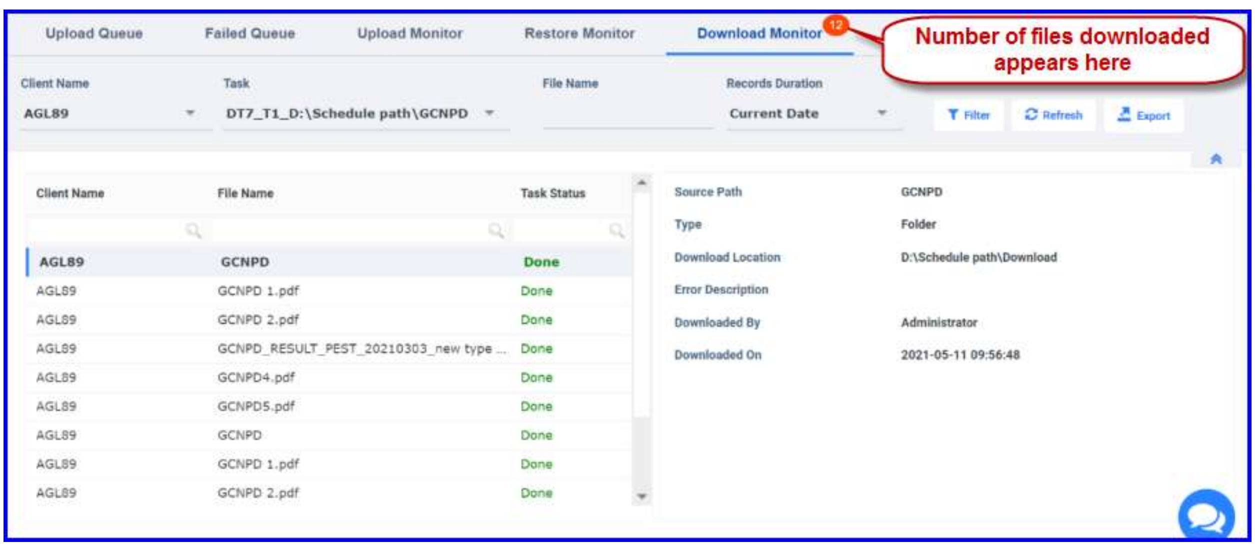


FIGURE: 59 - Monitor Schedule - Download Monitor Tab

You can see list of files downloaded for each schedules here.

6.4 Local File Delete Scheduler

The data files that are expired in the local machine based on the expiry policy are scheduled in the Local File Delete Scheduler.

1. On the main menu, click , and then click **Local File Delete Scheduler**. The **Local File Delete Scheduler** screen appears as shown in the figure:

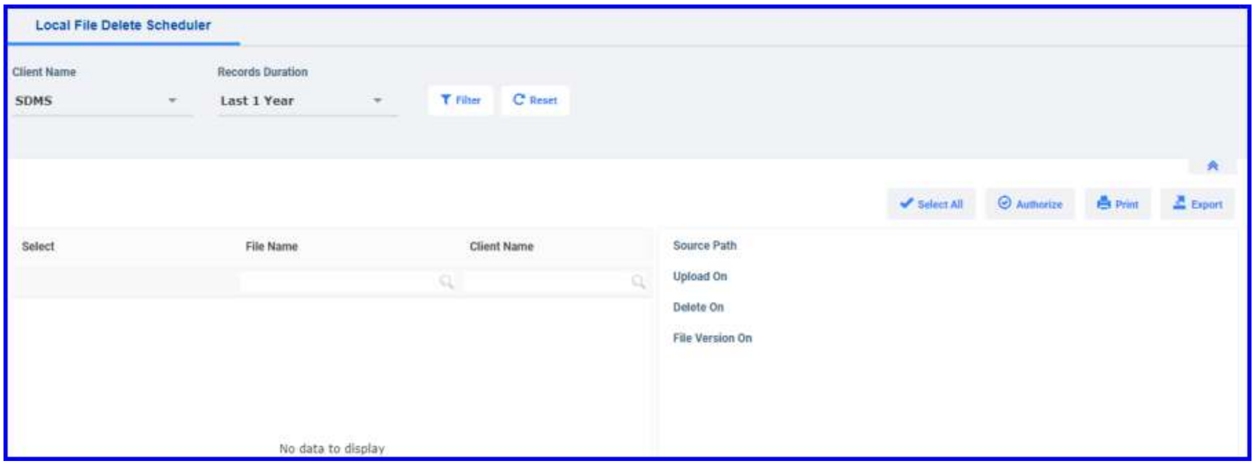


FIGURE: 60 - Local File Delete Scheduler Screen

Here you see the list of files to be deleted. The files can be filtered using the date filter.

2. Click **Select All** to select all files or choose the required files need to be removed from the local machine.
3. Click on **Authorize** button to authorize these files for deletion. The selected files are deleted from the local machine.
4. Click **Export** to export the file delete scheduler data to Excel.
5. Click **Print** to print file delete scheduler data.

6.5 Server File Delete Scheduler

The data files that are expired in the server machine based on the expiry policy are scheduled in the Server File Delete Scheduler.

1. On the main menu, click **Scheduler** and then click **Server File Delete Scheduler**. The **Server File Delete Scheduler** screen appears as shown in the figure:

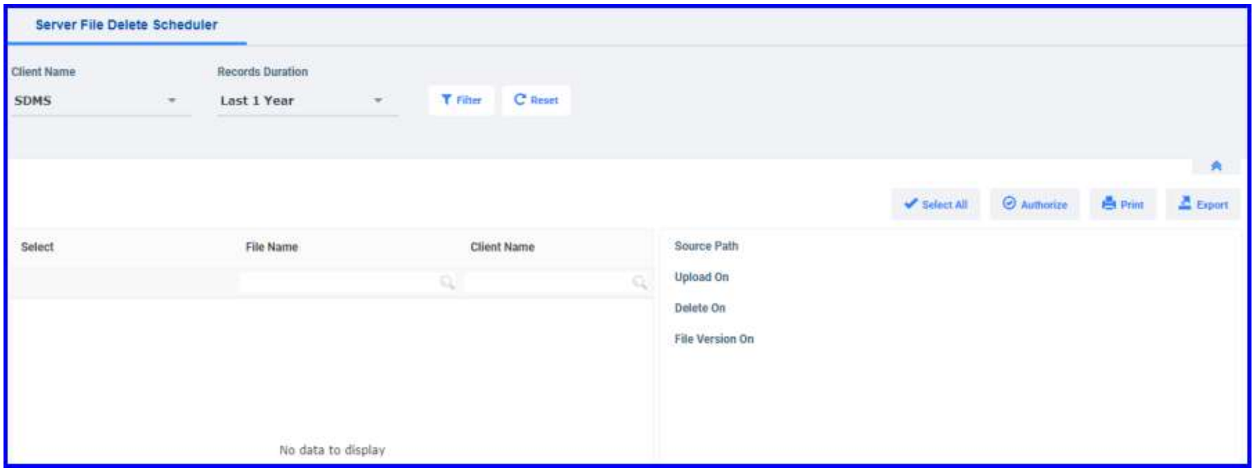


FIGURE: 61 - Server File Delete Scheduler Screen

Here you see the list of files to be deleted. The files can be filtered using the date filter.

2. Select all or choose the required files need to be removed from the server machine.

3. Click on **Authorize** button to authorize these files for deletion. The selected files are deleted from the server.

4. Click **Export** to export the server file delete scheduler data to Excel.

5. Click **Print** to print server file delete scheduler data.

6.6 Auto Download Configuration and Download Scheduler

Auto Download Configuration screen helps you to schedule download files uploaded based on a selected instrument. You can download files to a selected client.

1. On the main menu, click , and then click **Download Scheduler**. The **Auto Download Configuration** screen appears as shown in the figure:

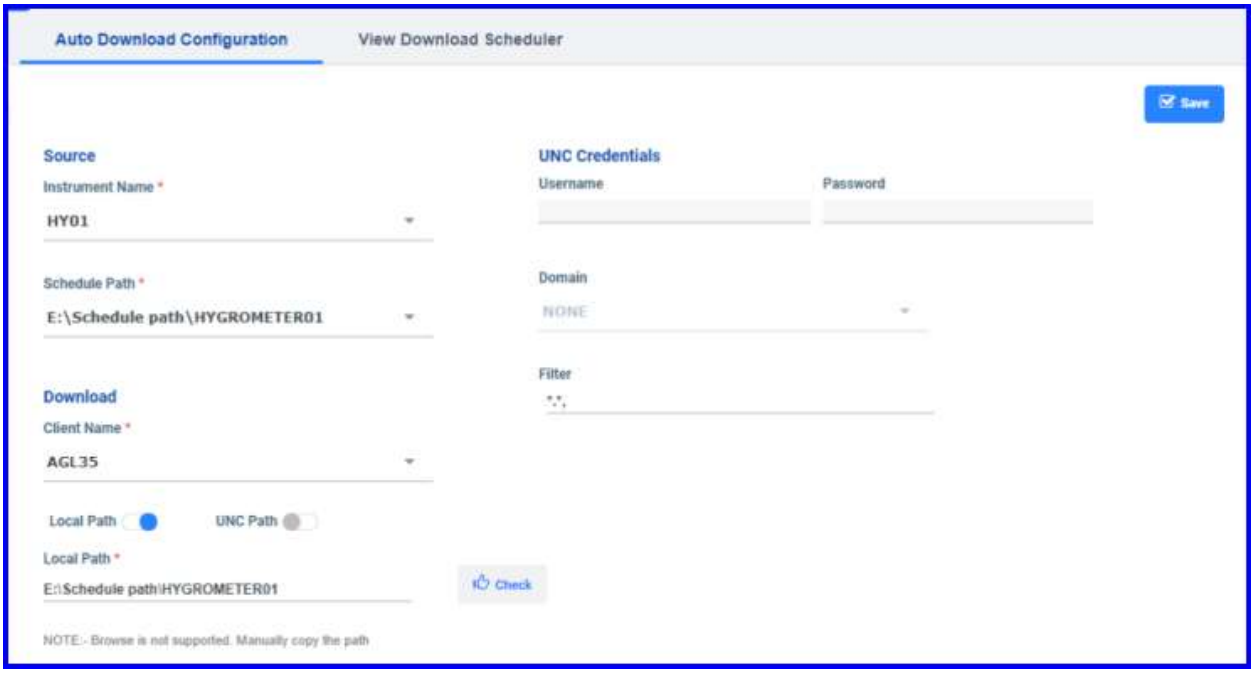


FIGURE: 62 – Auto Download Configuration Screen

2. Under **Source**, select the **Instrument** and **Schedule Path** from where you want to download the files.

3. Under **Download**, in the **Client Name** box select the client machine to download.

4. Specify **Local Path** / **UNC Path**.

5. If you choose **Local Path** then, type the local path where you want to download the files. Click **Check** to check if the mentioned path is valid and available.

6. If you choose **UNC Path** then, under **UNC Credentials**, provide valid user name, password and domain name.

7. In the **Filter** box, type the file extension to download specific files. By default it is "*.*" will download all file types.

8. Click **Save**. The files that are uploaded from the selected instrument in the specified path will be downloaded automatically to the local /UNC path mentioned. You will see a success message as shown in the figure:

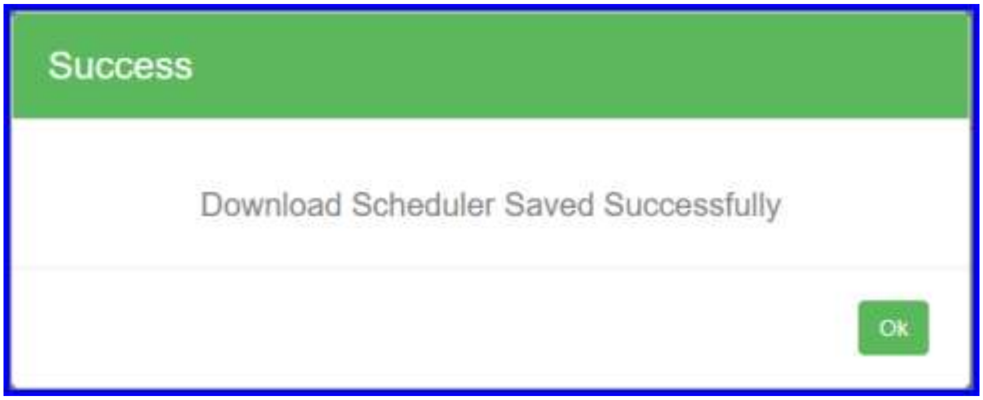


FIGURE: 63 – Auto Download Configuration Success Message

6.6.1 View Download Scheduler

Download Scheduler screen helps you to view downloads scheduled in the Auto Download Configuration screen. The View Download Scheduler screen appears as shown in the figure:

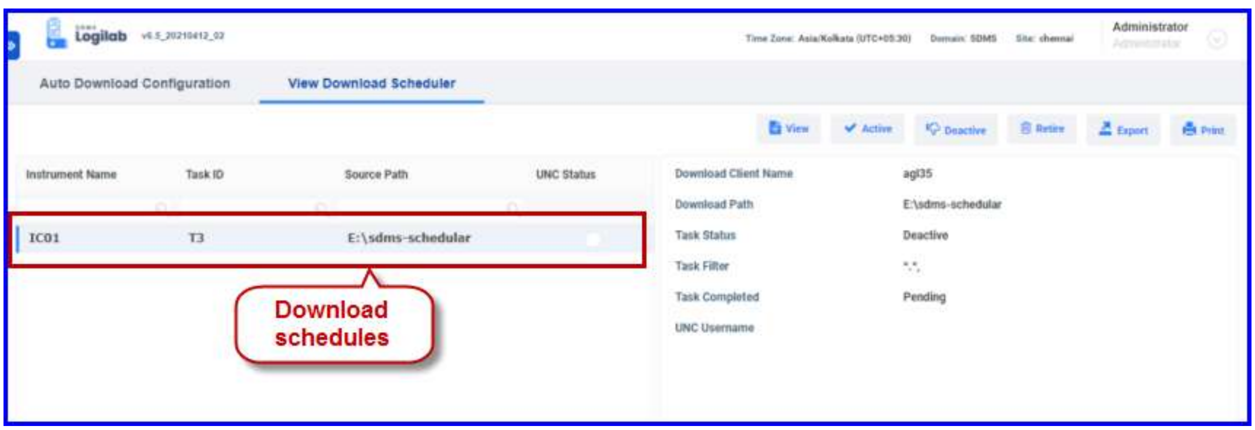


FIGURE: 64 - View Download Scheduler Screen

- You can select a schedule and then click **View** to view schedule details.
- Select a deactivated schedule and then click **Active** to activate.
- Select an active schedule and then click **Deactive** to deactivate the schedule.
- Select a schedule and then click **Retire** to retire a schedule. Schedule once retired cannot be activated.

6.7 Client Service Monitor

The **Client Service Monitor** screen helps you to monitor services running on the client machines. You can monitor status of the following services in the client machines:

- RoboticsServiceManager
- FTPConfigService
- RoboticsDriveWatcher
- RoboticsFileDownload
- RoboticsFileMonitor
- RoboticsPatchService
- RoboticsFileUpload

1. On the main menu, click , and then click **Client Service Monitor**. The **Client Service Monitor** screen appears as shown in the figure:

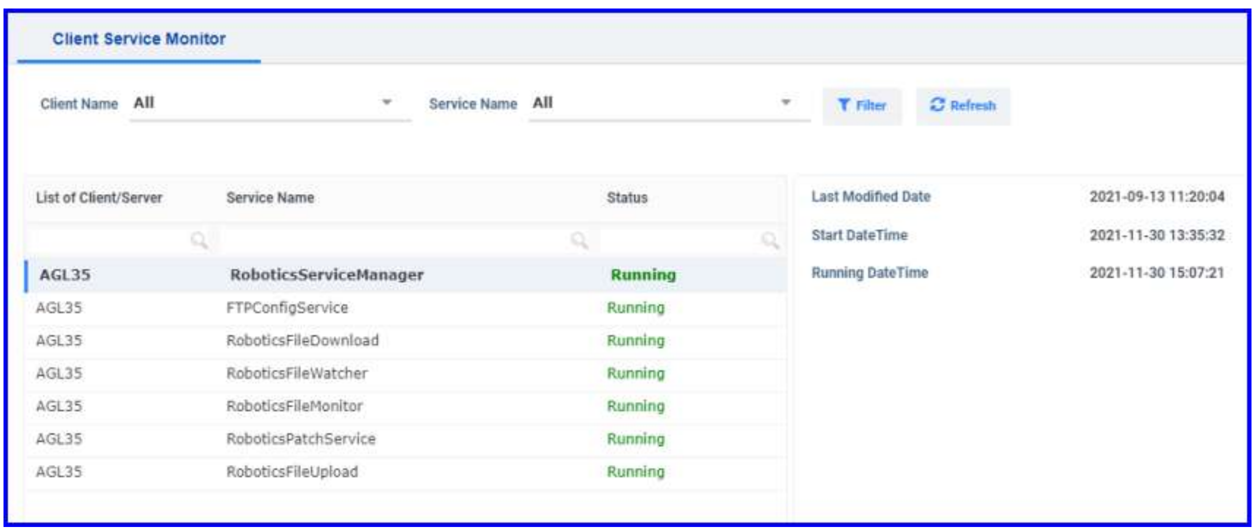


FIGURE: 65 - Client Service Monitor Screen

2. From the **Module Name** box, select the service you want to monitor. You can see the list of clients running the selected service and status as shown in the above figure.

7 Instrument Lock and Tags

Instrument Lock helps in linking metadata from the template tags. Before capturing data from an instrument, user can lock the instrument with specific combination of tags. These tags are automatically linked to the next data capture from instrument. The **Template Data** tab helps in viewing the server data based on the templates. This gives a more meaningful view for the data captured from instruments.

For example: A quality control analyst will be interested in viewing data based on product>test>batch#. To know more about Template Data view, refer Template Data Tab.

Once you create a template, you need to lock the instrument to receive files in the specified combination of tags in the template. To do so, follow these steps:

1. On the main menu click , **Lock Settings** and then click **Instrument Lock Settings**. The screen appears as shown in the figure:

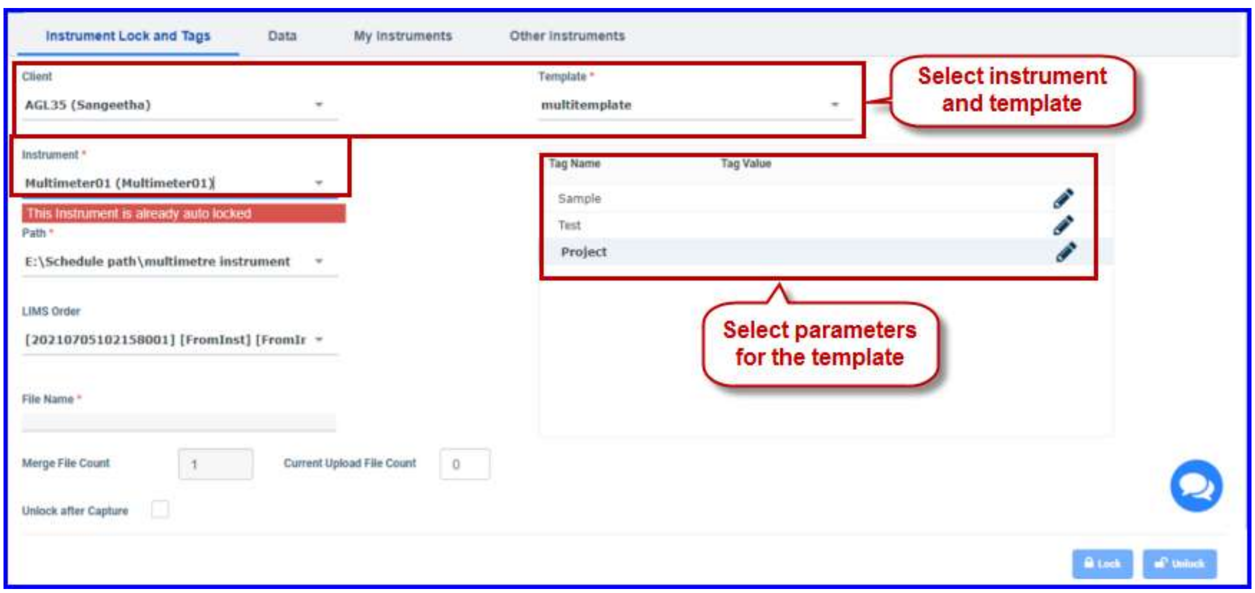


FIGURE: 66 - Instrument Lock Settings Screen

2. In the **Instrument Name** box, select the instrument.
3. In the **LIMS Order** field, select the LIMS order task.
4. In the **Template** box select the template for the instrument.

Note: *The Filename is mandatory only if the instrument is integrated with both interfacer and ELN.*

5. You can see list of tags for the selected template. Set parameters for the tags. You can also set parameters for fields that are not included in the template.

6. Click **Lock/Update**. Once the instrument is locked, the **Unlock** button appears.

At any point you can also update template parameters. You need to unlock a template before you update template parameters in the Instrument Lock screen. Select the instrument and template and then click **Unlock** to unlock.

Merge File Count: Applicable for interfacer instruments and RS-232 and TCP/IP. Multiple results will be captured in single file, until the instrument is unlocked. For eg: if the merge count is 3, after capturing 3 files from the instrument it will put all 3 files in single file and the merge count will be reset to 1.

Current Upload File Count: Current number of captures that are merged appears here.

Unlock After Capture: when checked, will release the instrument for other users as soon as a file/data is captured. You can uncheck this option to keep the instrument locked for capturing more files.

> ***Info:*** *When a file is received from an instrument, the file is filtered and captured based on the template parameters set in the Instrument lock screen. And the files are listed with the tag values in the Template Data tab.* *View Template Data tab*.

7.1 Data tab

Note: When a file is received from an instrument, the file is filtered and captured based on the template parameters set in the **Instrument Lock** screen. And the files are listed with the tag values in the **Data** tab as shown in the figure:

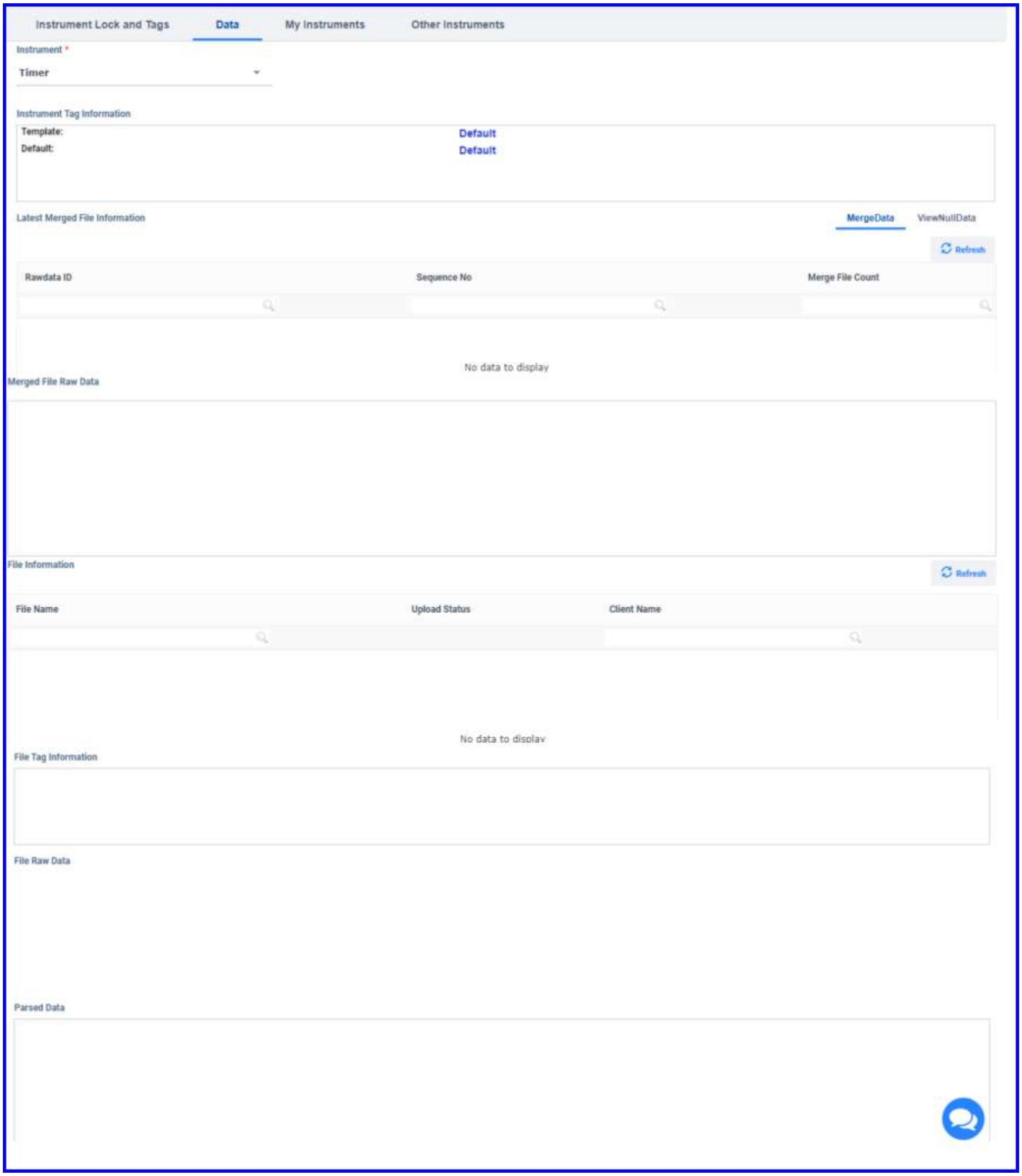


FIGURE: 67 - Data Tab showing locked instrument details with files uploaded and tag details

7.2 My Instruments

The My Instruments tab in the Instrument Lock screen displays list of instruments locked by you (current user) as shown in the figure:

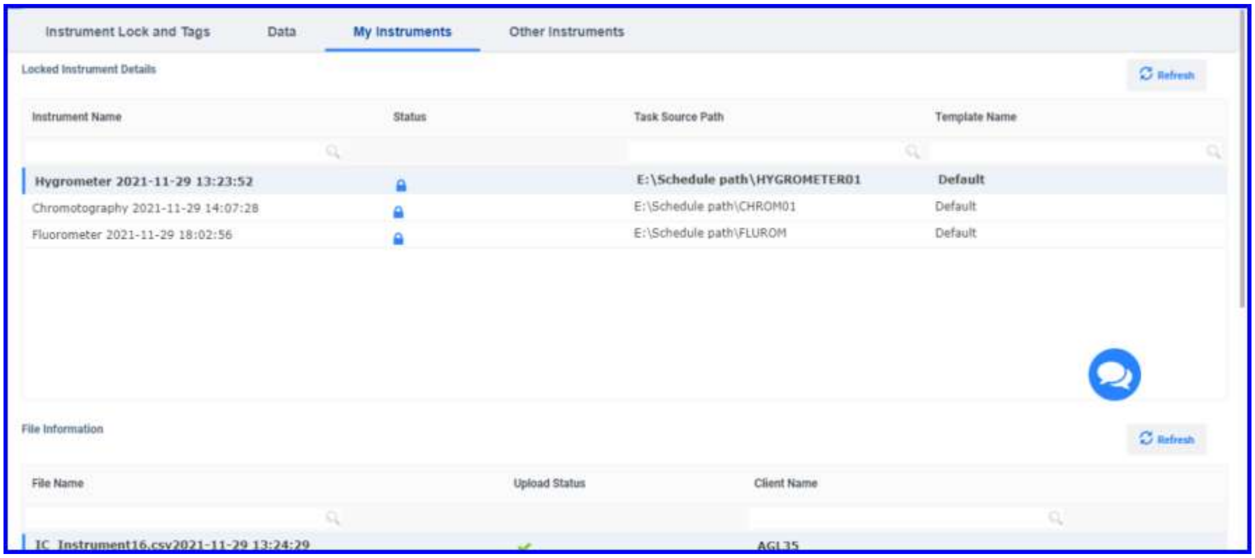


FIGURE: 68 - Instruments Locked by the Current User

7.3 Others Instruments

The Others Instruments tab in the Instrument Lock screen displays list of instruments locked by other users as shown in the figure:

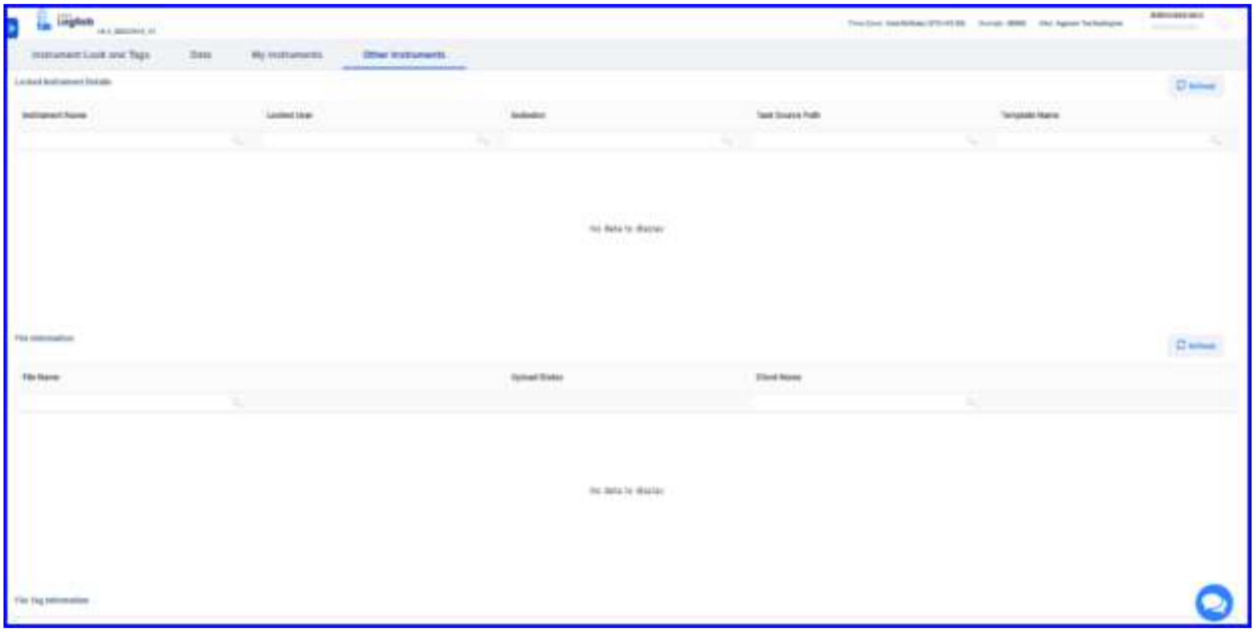


FIGURE: 69 - Instruments Locked by Other Users

Note: *Administrator can unlock instruments locked by other users.*

8 User Management

The User Management screen enables you to create and manage user groups and users. You can create user group and then group/create users under user groups.

Manage User interface helps you to do the following tasks:

- Create new user group
- Set access rights to user groups
- Create new user

8.1 Create user Group

1. On the main menu click , and then click **User Management**. The User Group screen appears as shown in the figure:

FIGURE: 70 - User Management – User Master Screen

2. In the **User Group** tab, click 

. The **Add New Group** dialog appears as shown in the figure:

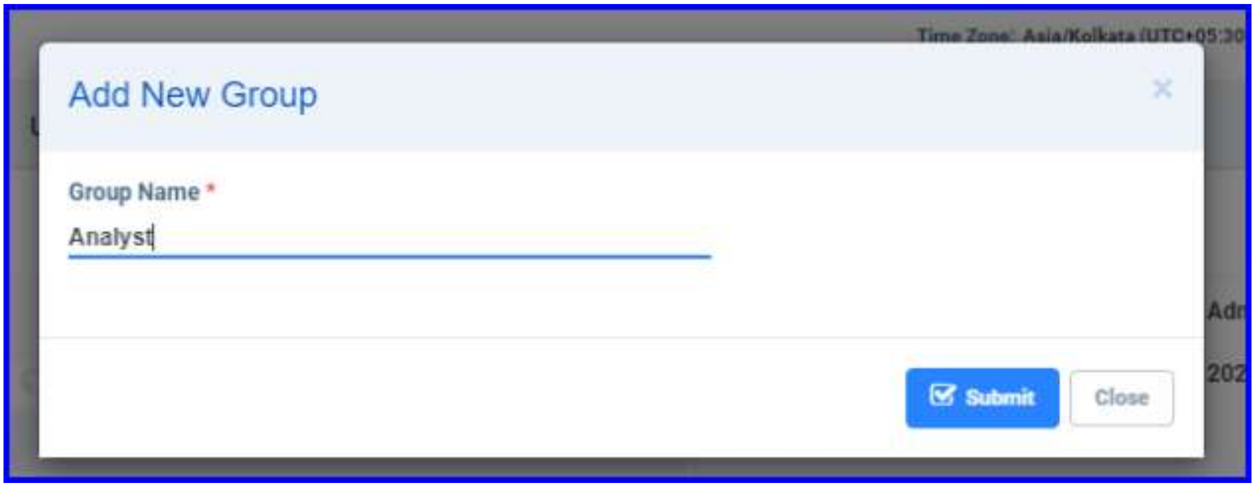


FIGURE: 71 - Add New Group Dialog

3. In the **Group Name** box, type the name of the user group you want to create and then click **Save**. You can see the new user group created and appear in the user group list.

8.1.1 Edit user group

1. To edit the user group, select the user group from the list and then click **Edit**. In the **Edit User Group** dialog, edit user group name and then click **Save**.

8.1.2 Activate or deactivate user group:

- To activate or deactivate an user group, select the user group from the list and then click Active/De-Active. You will see a confirmation message saying “Do you want to Activate / Deactivate User Group? Click **Ok**. The user group will be activated / deactivated.

8.2 Creating new user

To create/add a new user, follow these steps:

1. On the main menu click, and then click **User Management**. In the User Management screen, click **User Master**. The **User Master** tab appear as shown in the figure:

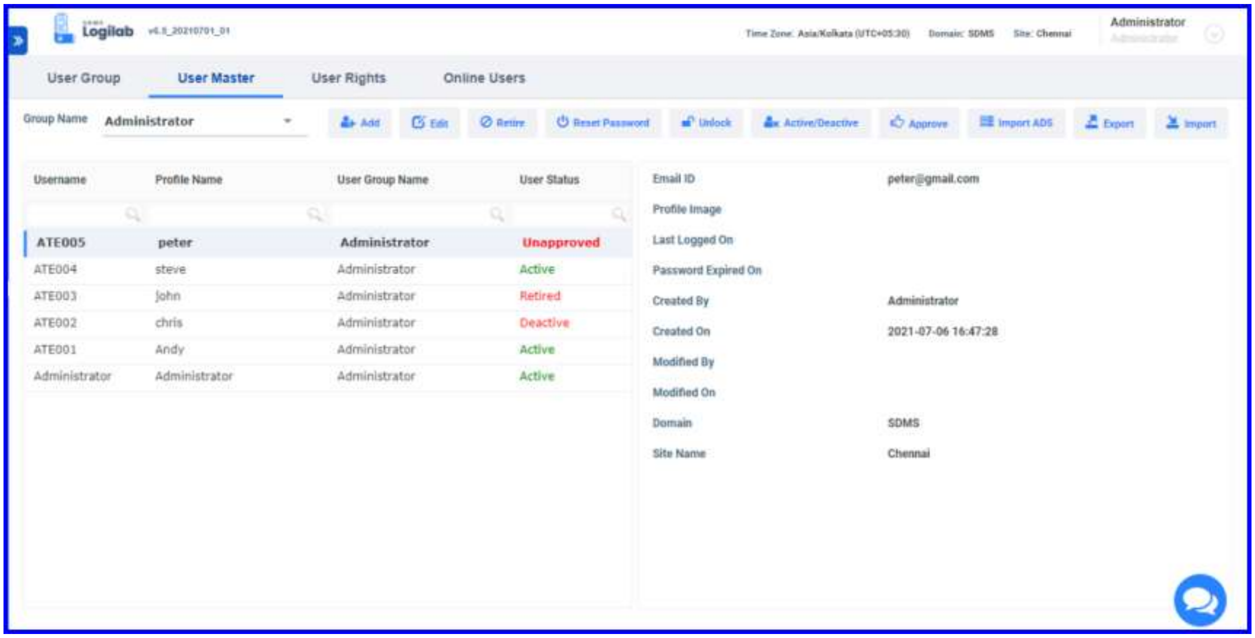


FIGURE: 72 - User Management - User Master Screen

2. In the **User Master** screen, in the **Group Name** box select the user group you want to create user. And then click  . The add user dialog appears as shown in the figure:

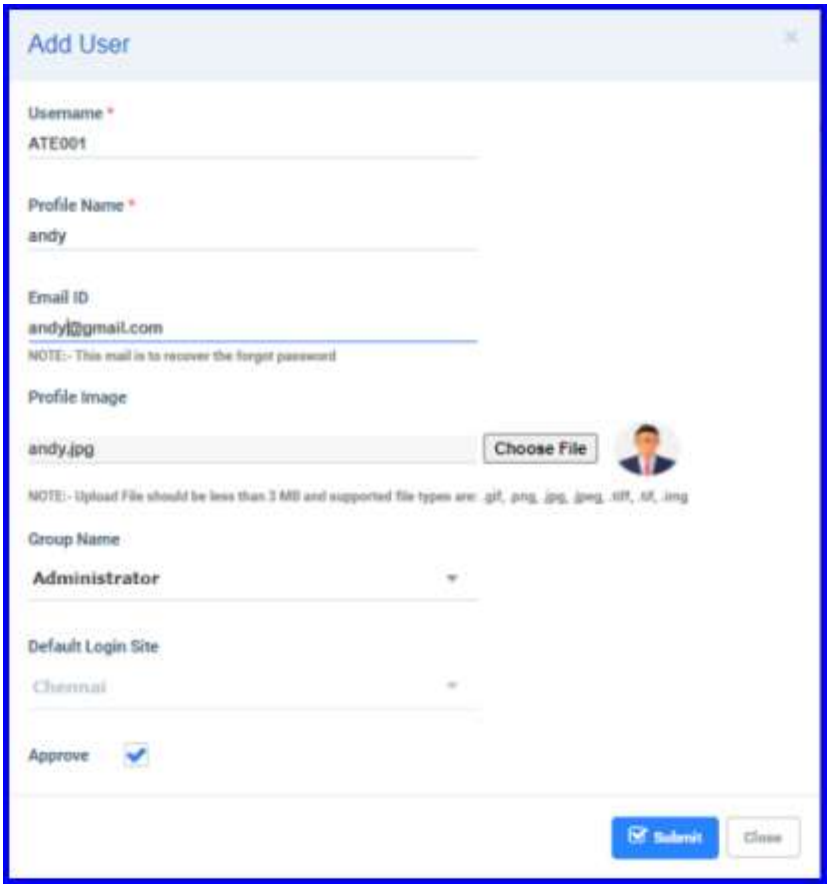


FIGURE: 73 - Add User Dialog

3. In the **User Name** field, type the user name that you want to create for the user to login to SDMS.

4. In the **Profile Name** field, type the designation of the user.

5. In the **Email ID** field, type the user email id that can be used to recover forgot password.

6. In the **Profile Image** field, click Choose File and select the profile photo of the user.

7. From the **Group Name** field, select the user group where you want to group this user.

8. You can set the **Default Login Site** in the edit user screen.

9. Click **Approve** to approve the user. You can also approve user later.

10. Click to select the **LabSheet Access** check box, to grant lab sheet access to the user

11. Click **Submit**.

8.3 Other Options in the User Master Screen

8.3.1 Edit User

1. On the main menu click , and then click **User Management**. In the User Management screen, click **User Master**.

2. In the **User Master** tab select the user you want to edit and then click 

. The **Edit User** dialog appears as shown in the figure:

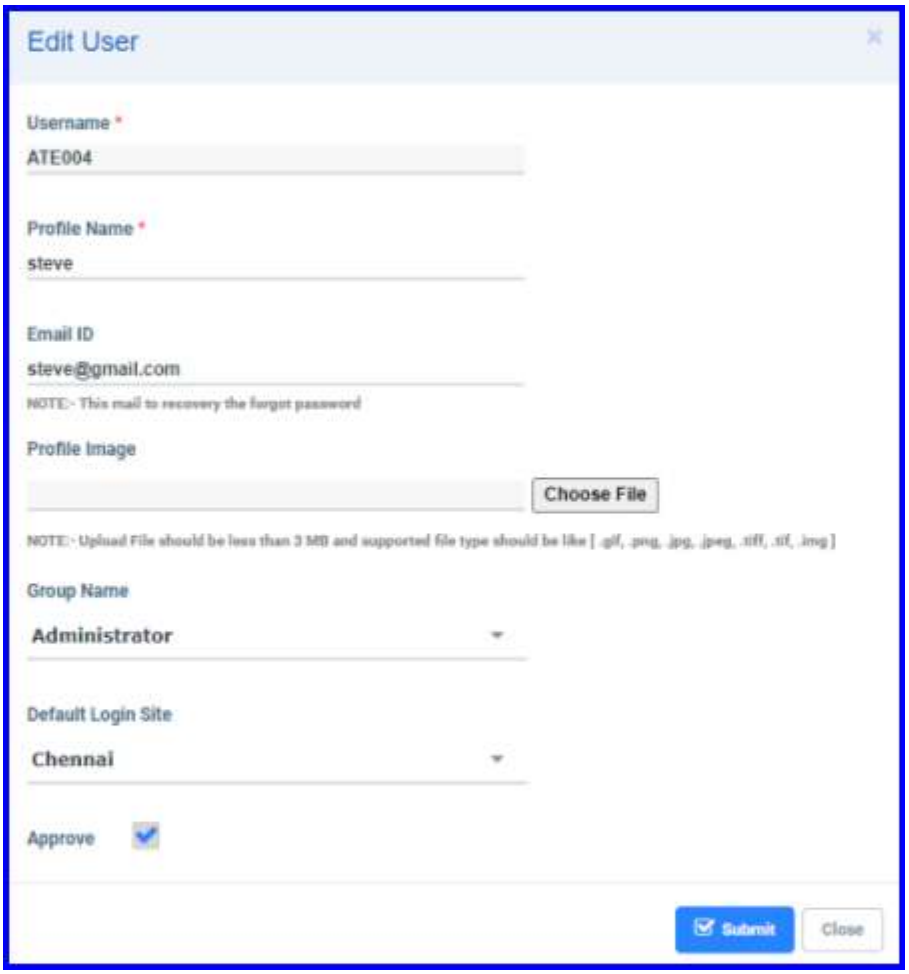


FIGURE: 74 - Edit User Dialog

3. In the **Default Login Site** field, select the site the user can login by default. In the Login screen the **Site** field will be automatically filled if the **Default Login Site** field is set here.

Note: *You cannot edit* ***Username****.*

4. Do required changes and then click **Submit** to save the changes.

8.3.2 Retire User Account

If a user account is no longer required, you can retire the user account. To do so, follow these steps:

Warning*: An user account once retired cannot be activated again.*

1. In the **User Master** tab, select the user you want to retire and then click Retire.

2. An **Audit Trail** screen appears for authentication. Type your password, reason and comments appropriately and then click **Submit**.

Note*: The user account is retired. Hence, you cannot activate, edit or approve the user account.*

8.3.3 Reset Password

In the **User Master** tab, select the user account and then click Reset Password. The user is allowed to reset the password on their next login.

8.3.4 Unlock

User account will be locked after three consecutive invalid password entry attempts. Select the locked user account and then click Unlock to unlock the user account.

8.3.5 Active/Deactive

1. You can temporarily deactivate a user account for some reasons. To do so, follow these steps:

2. In the **User Master** tab, select the user you want to deactivate and then click Active/De-Active.

3. An audit trail screen appears for authentication. Type your password, reason and comments appropriately and then click **Submit**.

***Note**: The user account is deactivated. Hence, the useraccount cannot be used untill it is activated again.*

4. To activate user account, select the user you want to activate and then click Active/De-Active.

5. An audit trail screen appears for authentication. Type your password, reason and comments appropriately and then click **Submit**.

8.3.6 Approve

While creating a user account, if it is not approved then the user account has to be approved to use it. In the **Manage User** tab, select the unapproved user account and then click Approve.

8.3.7 Import ADS

Import ADS option helps you to import user accounts from a Domain. To do so, follow these steps.

1. In the **User Master** tab, click Import ADS. The screen appears as shown in the figure:

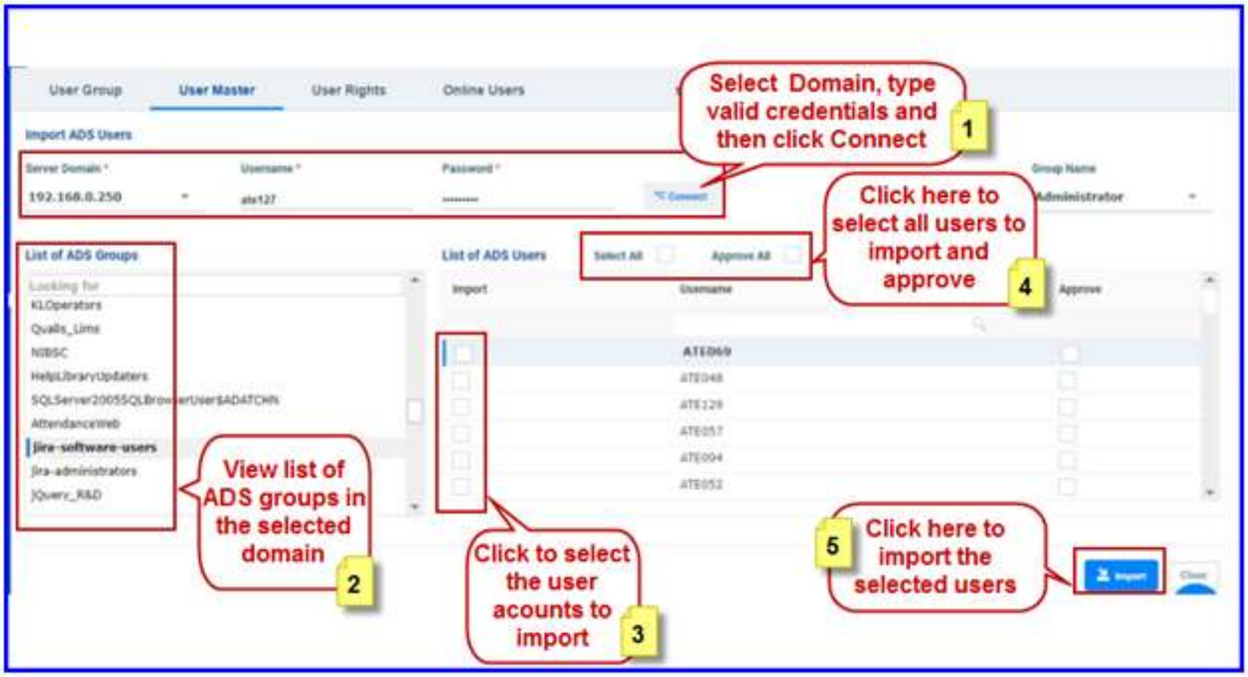


FIGURE: 75 – User Master - Import ADS screen

Follow the onscreen instructions to import users from a Domain.

8.3.8 Export

On the **Manage User** screen click Export. The list of user accounts will be exported to an EXCEL sheet.

8.3.9 Import

1. On the **Manage User** screen click Import. The Import Users dialog appears as shown in the figure:

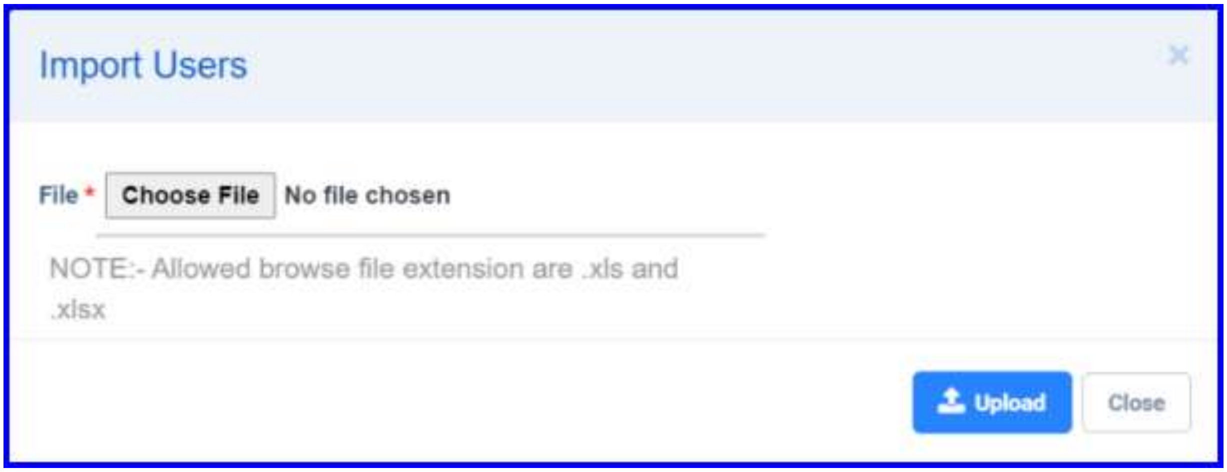


FIGURE: 76 - Import Users Dialog

2. Click **Choose File** and locate the EXCEL file to import and then click **Upload**.

8.4 Set access rights to user groups

To define access rights to the user groups, follow these steps:

1. On the main menu click , and then click **User Management**.
2. In the **User Management** screen, click to select the **User Rights** tab. The User Rights tab appears as shown in the figure:

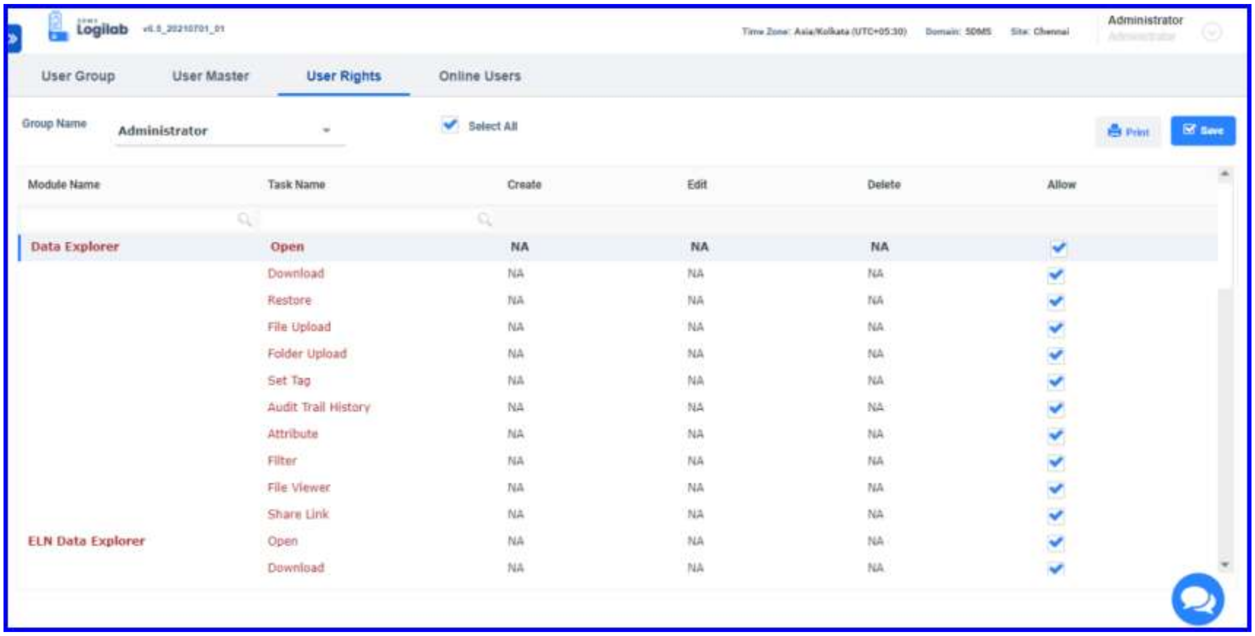


FIGURE: 77 - User Management – User Rights Screen

In the User Rights tab you can see the list of modules and tasks in SDMS. And for each task you can define create, edit and delete rights for the selected user group.

3. From the **Group Name** box, select the user group you want to define rights.

4. Click **Create** / **Edit** / **Delete** for the tasks in the modules that are applicable for the user group. You can also click **Allow** to grant access to the applicable Control Right.

5. Click **Save**.

6. Click **Print** to print the user rights details if required.

8.5 Online Users

Online Users tab helps to view list of users currently logged in to the SDMS application. You can also chat with online users using the chat facility.

To view list of online users in SDMS application, follow these steps:

1. On the main menu click , and then click **User Management**.

2. In the **User Management** screen, click to select the **Online Users** tab. The Online Users tab appears as shown in the figure:

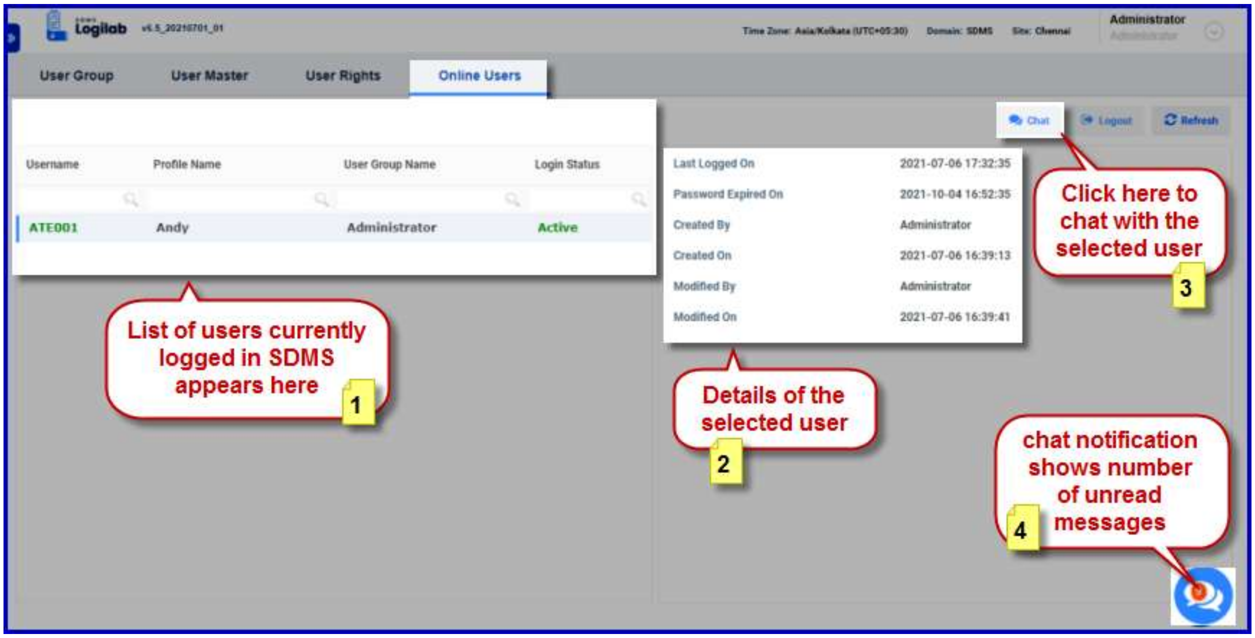


FIGURE: 78 - User Management – Online Users Tab

3. Select a user from the list and then click **Chat**. The Chat screen appears as shown in the figure:

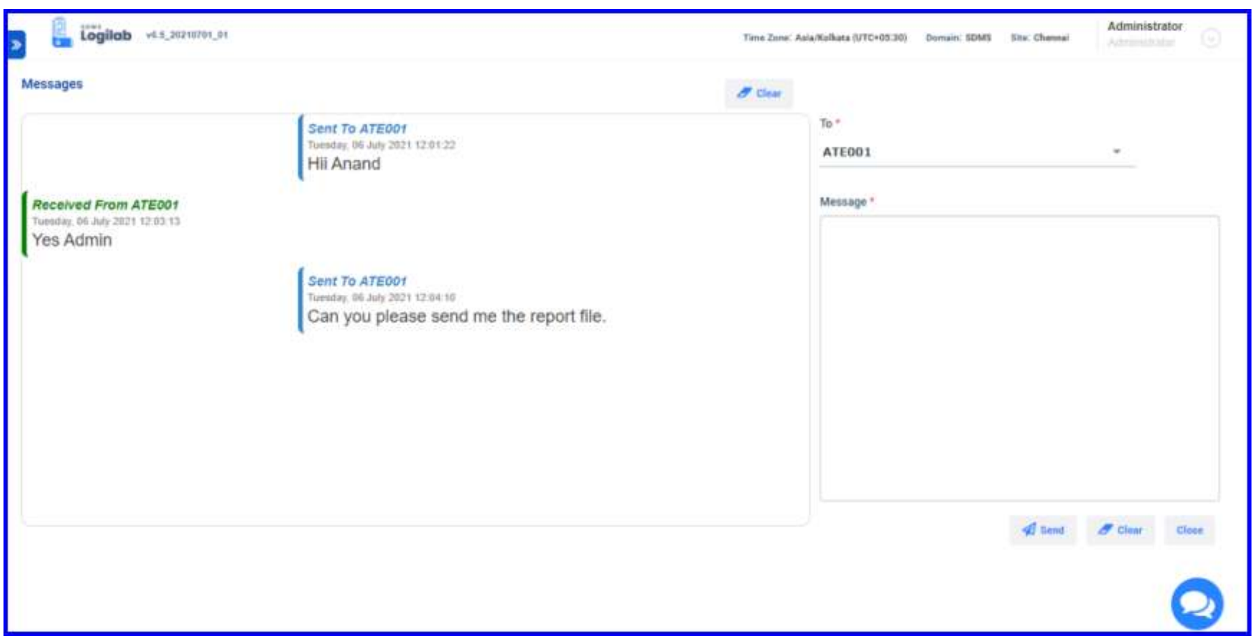


FIGURE: 79 - Online User – Chat Screen

4. In the **Message** box, type your message and then click **Send**. You can also receive messages from other online users and view the same on the left side under **Messages** as shown in the above figure.

5. Click **Clear** that appears on the top of the chat screen to clear the chat history and the cleared chat history cannot be restored.

6. Click **Clear** that appears below the **Message** box to clear the message you just typed in the **Message** box.

8.6 Setting up Password Policy

To setup password policy, follow these steps:

1. On the main menu click , and then click **Password Policy**. The Password Policy screen appears as shown in the figure:

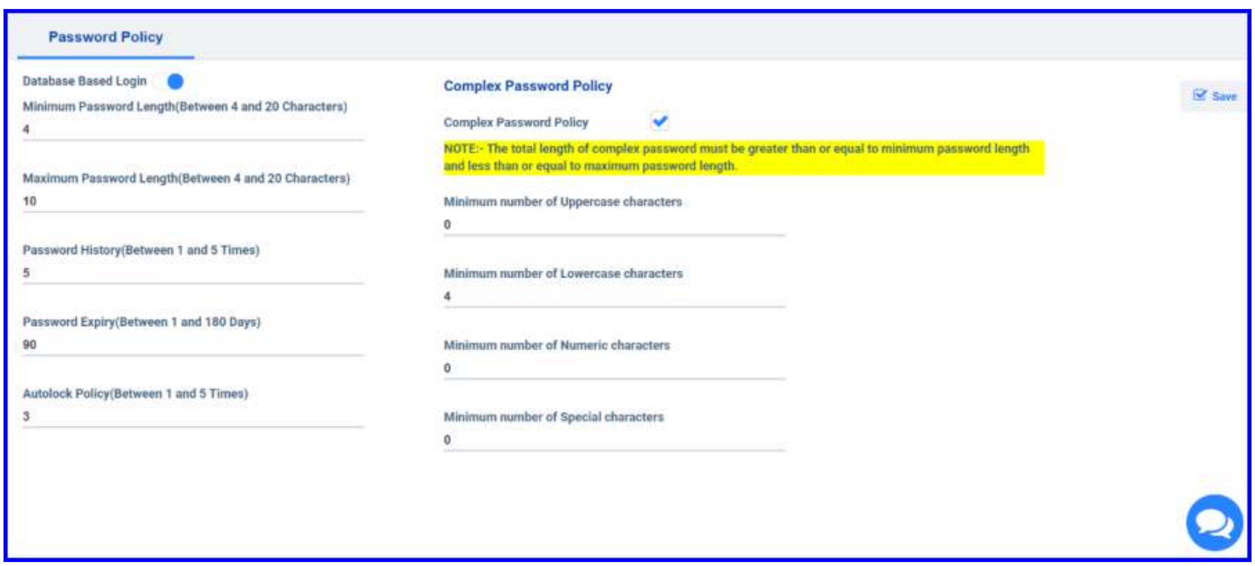


FIGURE: 80 - Password Policy Screen

You can set up password policy for database based logins and domain based logins.

2. By default you can setup password policy to **Database Based Logins.**

3. Setup basic rules for the password such as **Minimum Password Length**, **Maximum Password Length**, **Password History**, **Password Expiry** duration and **Auto Lock Policy**.

4. To setup complex password policy, click to select the **Complex Password Policy** check box.

5. Set up values for complex policies such as: **Minimum number of capital characters**, **Minimum number of small characters**, **Minimum number of numeric characters**, and **Minimum number of special characters**.

6. Click **Save**.

8.7 Set Scheduler rights to user groups

Note: *scheduler Rights screen will be available only when the scheduler rights is enabled in the **Settings** >> **preferences** screen.*

To define access rights to the user groups, follow these steps:

1. On the main menu click , and then click **User Management**.

2. In the **User Management** screen, click to select the **Scheduler Rights** tab. The Scheduler Rights tab appears as shown in the figure:

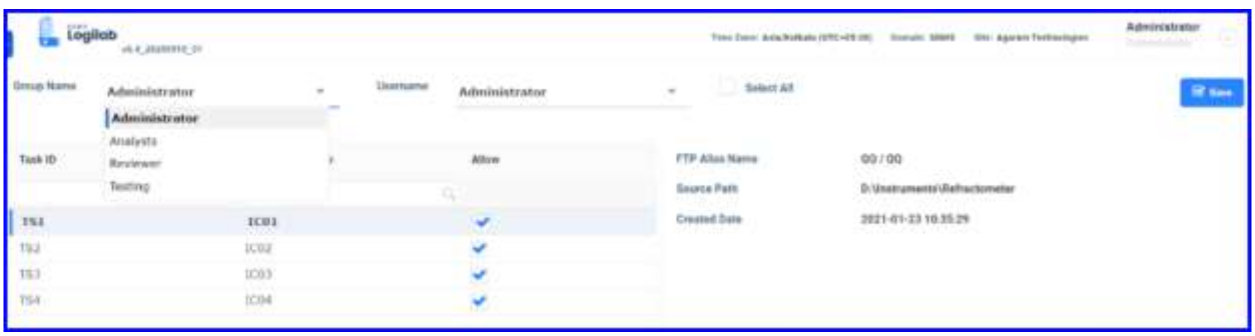


FIGURE: 81 - User Management – Scheduler Rights Screen

You can see list of tasks scheduled in the screen. Select the group name and then the user name and then click to select the check box in the **Allow** column to set rights to the selected tasks.

3. Click **Save**. You will see a message saying “Scheduler Rights Saved Successfully”.

9 Log History

9.1 Audit Trail History

Audit Trail menu helps you to view audit trail log. You can filter records based on specified duration, user and module name. You can export records to excel file, print records, create archive and open archive to view.

To view audit trail log, follow these steps:

1. On the main menu, click , and then click **Audit Trail History**. The **Audit Trail History** screen appears as shown in the figure:

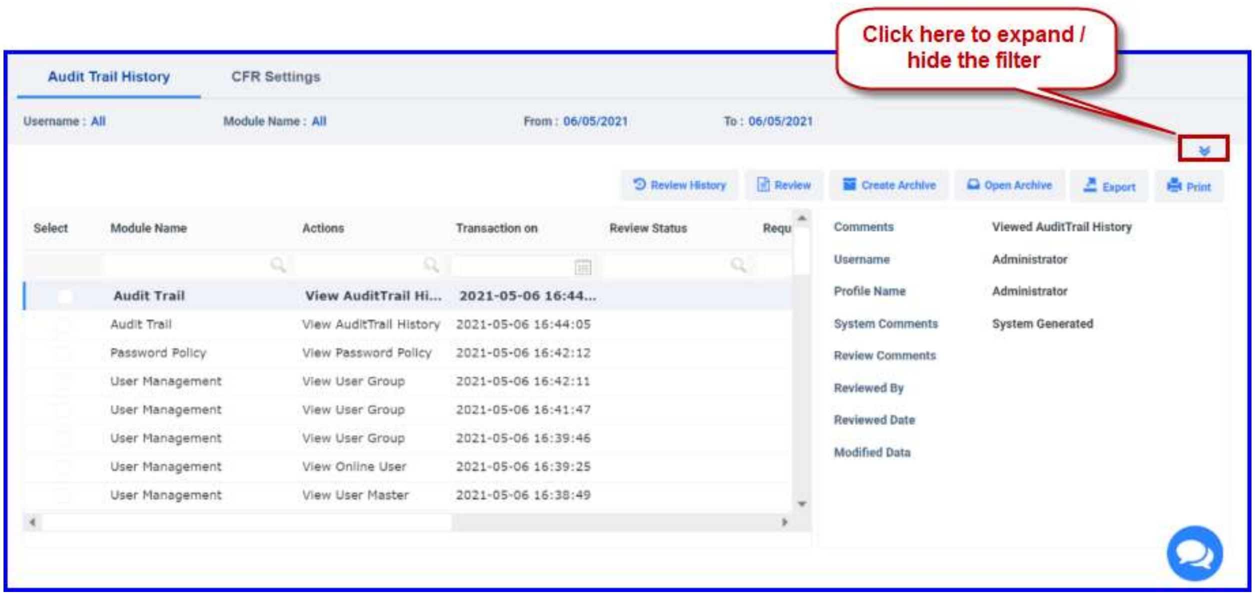


FIGURE: 82- Default Audit Trail History Screen

Click the to expand the filter section as shown in the above figure. The expanded filter section appears as shown in the figure:

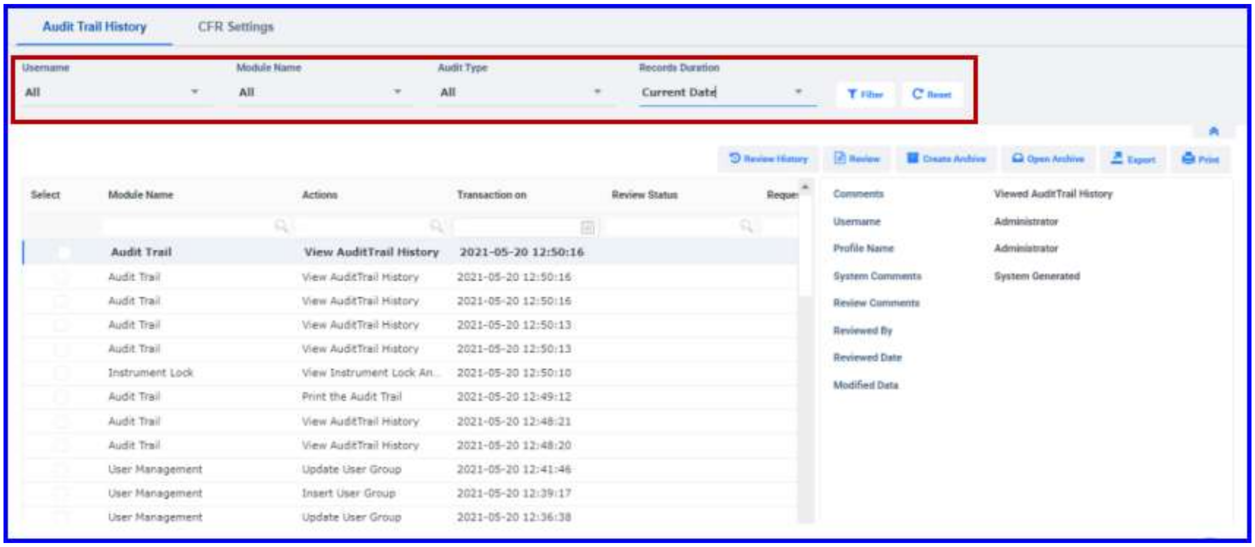


FIGURE: 83- Expanded Audit Trail History Screen

You can filter records based on anyone or all of the following options:

- **Records Duration**: Select the record duration and then click Filter to filter records based on the specified time frame.
- **User Name**: From the User Name box, select the user and then click Filter to filter records based on the specified user.
- **Module Name**: From the Module Name box, select the module name and then click Filter to filter records based on the specified module.
- **Audit Type**: Records can also be filtered based on audit type. Audit type includes User, System, and All options.

9.1.1 Review and Review History

To review audit trail, click to select the audit trail entries and the click **Review**. The status of the audit trail record(s) will become **Reviewed**.

Click **Review History** to view details of records reviewed.

9.1.2 Create Archive and Open Archive

Click **Create Archive** to create archive of audit trail log.

Click **Open Archive** to open selected archive to view.

9.1.3 Export Audit Trail History

1. In the **Audit Trail History** screen, click **Export** to export audit trail history to Excel.
2. In the **SaveAs** file dialog, in the file **Name** box, type a name for the file and then click **Save**. The audit trail log records are exported to the Excel sheet.

9.1.4 Print Audit Trail History

1. To print audit trail history, in the **Audit Trail History** screen, click **Print**.

9.2 CFR Settings

CFR Settings menu helps you to set up audit trail options in Logilab SDMS. You can enable audit trail and add or delete reasons options that are used in the audit trail reason box.

To set up audit trail options, follow these steps:

1. On the main menu, click , and then click **Audit Trail History**. Click to go to the **CFR Settings** tab. The screen appears as shown in the figure:

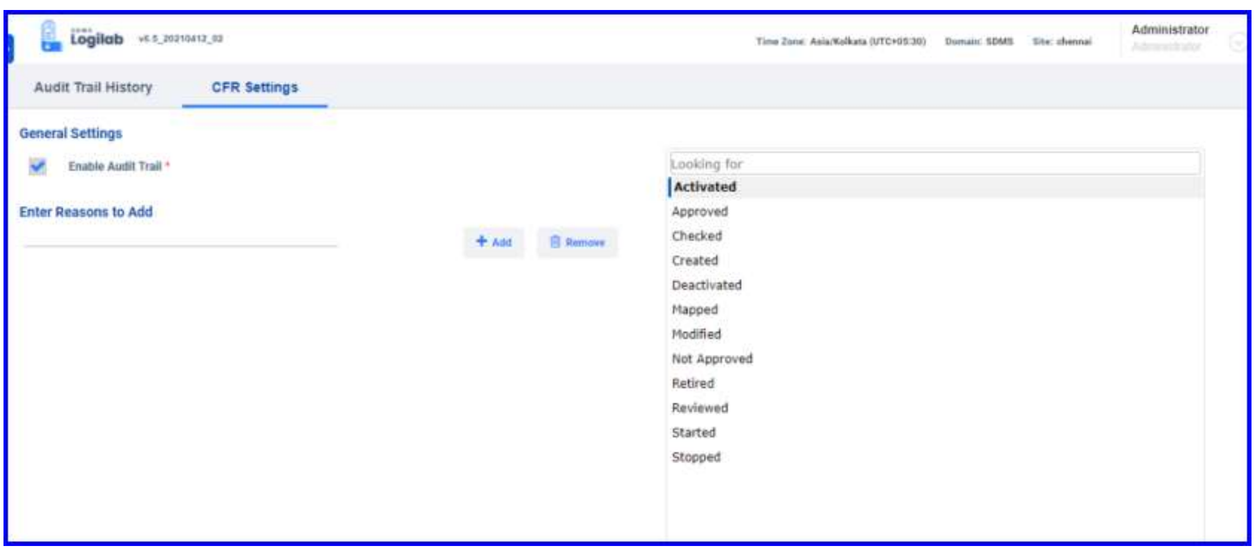


FIGURE: 84 - CFR Settings Screen

2. Under **General Settings**, do the following:

3. Click to select the **Enable Audit Trail** to enable audit trail in Logilab SDMS.
4. In the **Enter Reasons To Add** box, type the reason/comment that you want to add to the list. These reasons/comments appear in the Audit Trail dialogs.
5. To delete a reason from the list, select the reason and then click **Remove**.

9.3 Download Logs and Download Error Logs

The Download Logs screen appears as shown in the figure:

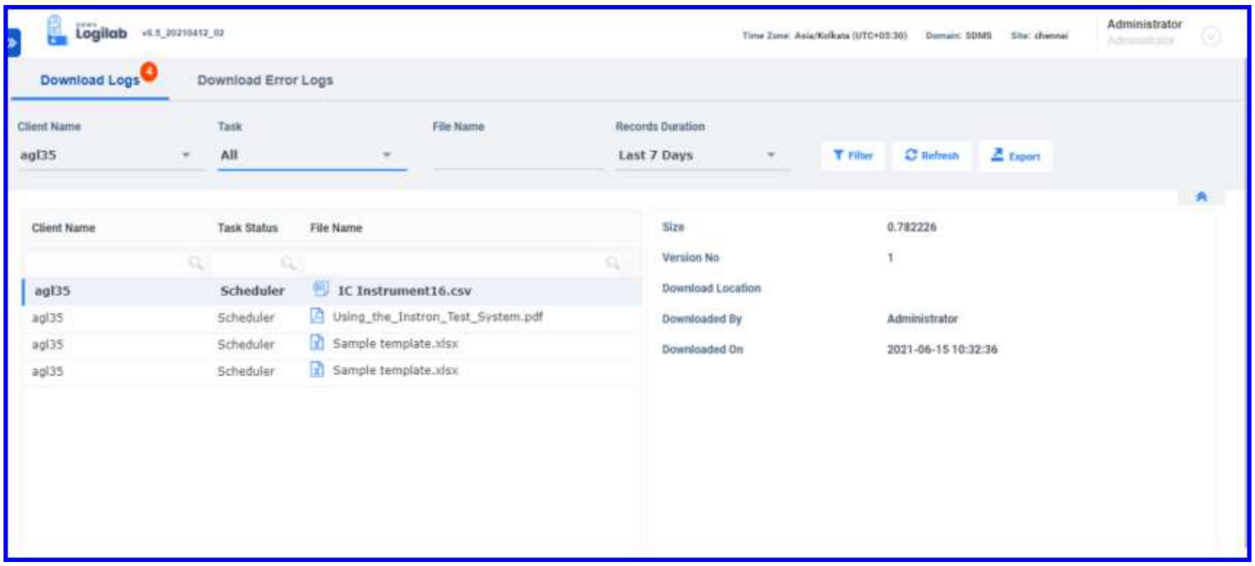


FIGURE: 85 – Download Logs Screen

The Download Logs screen consists of the following tabs:

- **Download Logs**: This tab displays the file download details such as the client machine name, file name, and filename etc.
- **Download Error Logs**: This tab displays the error details occurred while downloading files.

To export the log details to Excel file, click **Export**.

9.4 Upload Logs and Manual Upload Logs

The Upload Logs screen appears as shown in the figure:

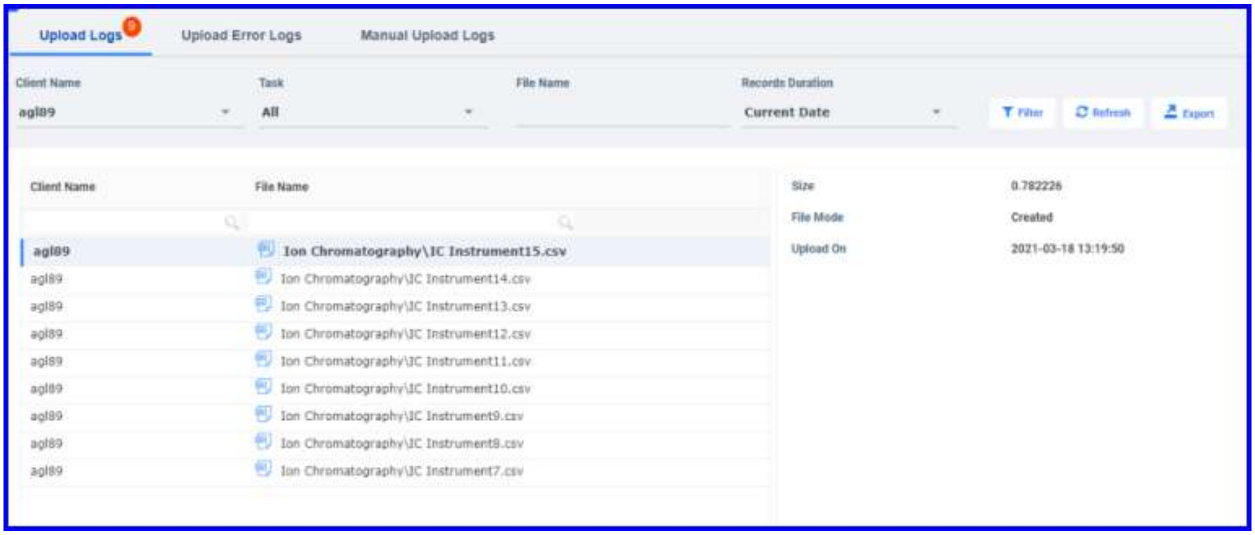


FIGURE: 86 – Upload Logs Screen

The Upload Logs screen consists of the following tabs:

- **Upload Logs**: This tab displays the file upload details such as the client machine name and file name.
- **Upload Error Logs**: This tab displays the error details occurred while uploading files.
- **Manual Upload Logs**: This tab displays the upload details of manually uploaded files such as the client machine name, file name, location, user name etc.

To export the log details to Excel file, click **Export**.

9.5 Restore and Restore Error Logs

The Restore Logs screen appears as shown in the figure:

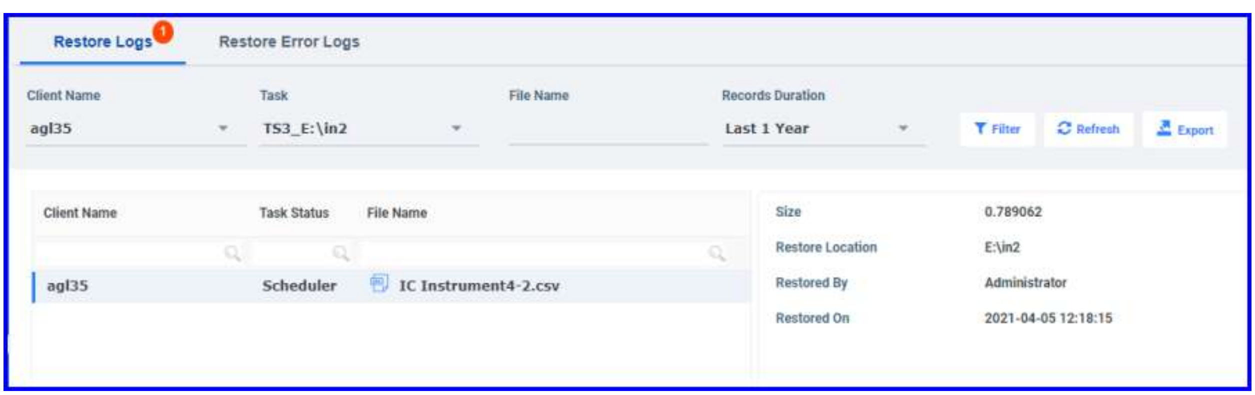


FIGURE: 87 – Restore Logs Screen

The Restore Logs screen consists of the following tabs:

- **Restore Logs**: This tab displays the file restore details such as the client name, task status and file name.
- **Restore Error Logs**: This tab displays the error details occurred while restoring files.

To export the log details to Excel file, click **Export**.

9.6 Server and Local File Delete Logs

The Local File Delete Logs screen appears as shown in the figure:

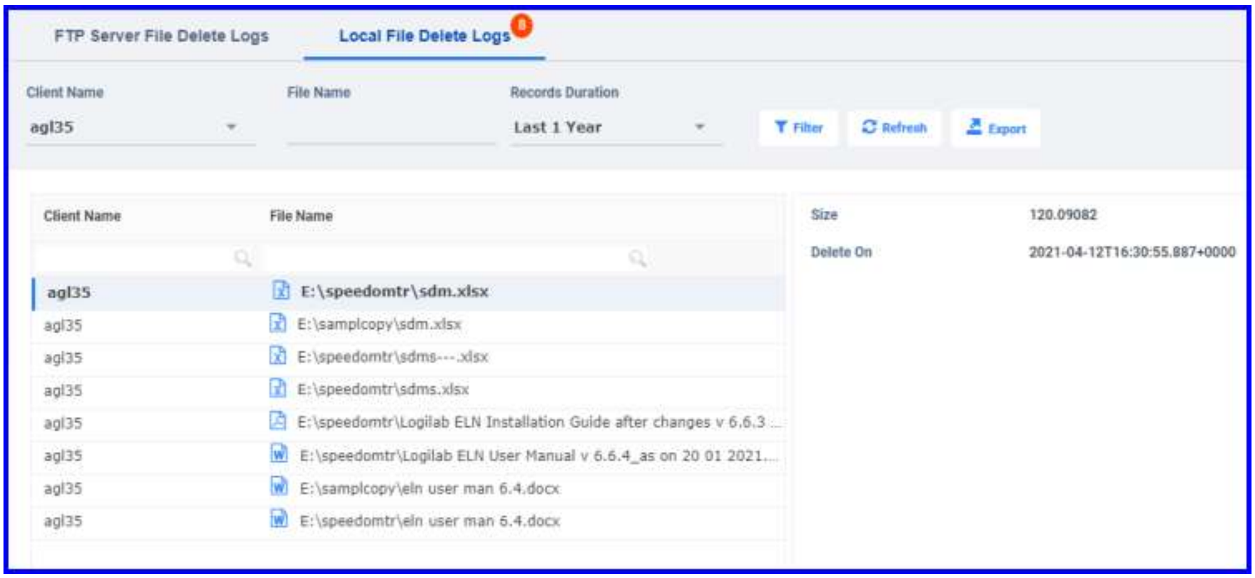


FIGURE: 88 – Local File Delete Logs Screen

The FTP Server File Deletion Log screen consists of the following tabs:

FTP Server File Deletion Logs: This tab displays the deleted file details in the FTP Server such as the client name and file name.

Local File Deletion Logs: This tab displays the deleted file details from the local machine such as the client machine name, file name, location, user name etc.

To export the log details to Excel file, click **Export**.

9.7 Viewing Scheduler Config. Logs

Scheduler Configuration Log screen enables you to view scheduler log. To view scheduler configuration log, follow these steps:

1. On the main menu, click , and then click **Scheduler Configuration Log**. The **Scheduler Configuration Log** screen appears as shown in the figure:

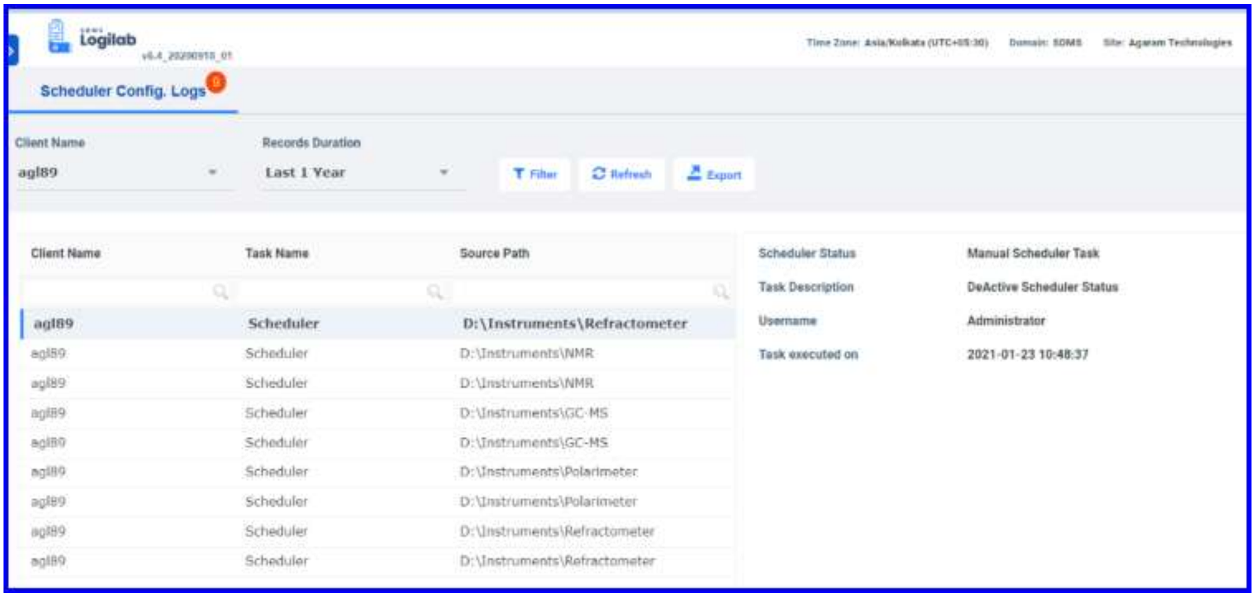


FIGURE: 89 - Scheduler Config. Log Screen

Details of all the configurations related to the scheduler appear as shown in the above figure.

2. To export the log details to Excel file, click **Export**.

10 Settings

10.1 Preferences

To configure Preferences, follow these steps:

1. On the main menu, click , and then click **Preference**. The screen appears as shown in the figure:

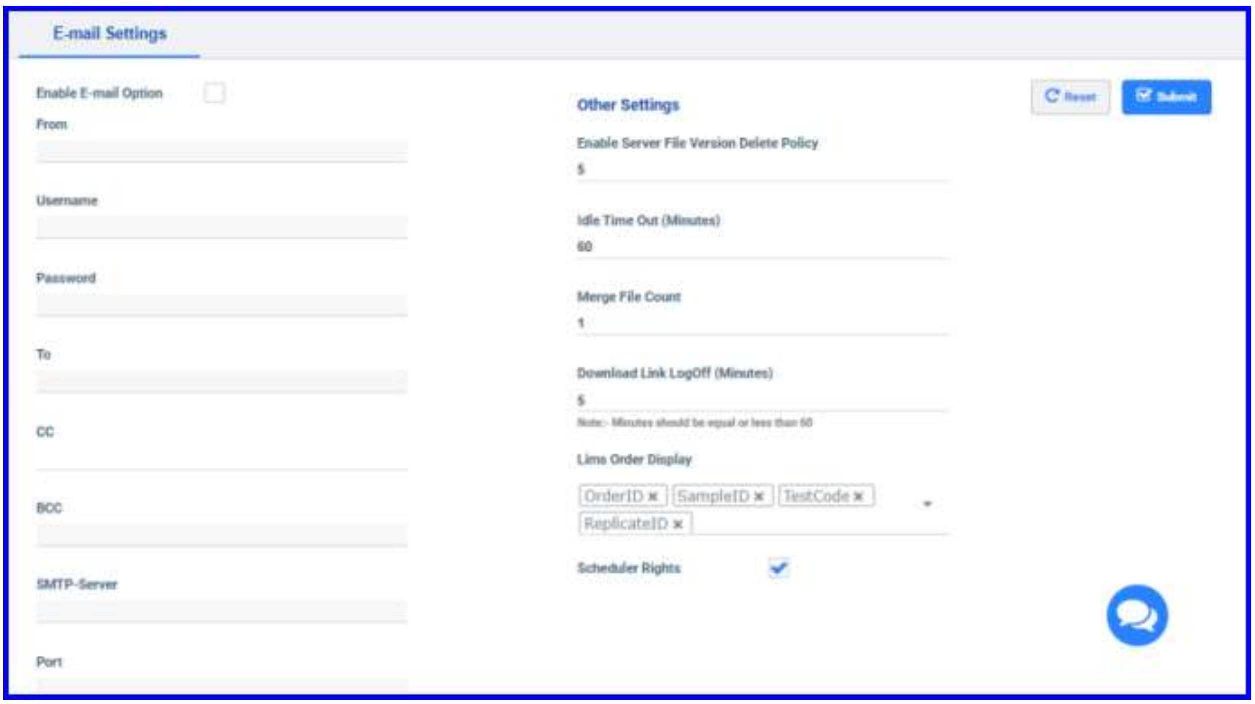


FIGURE: 90 - Preferences Screen

2. Fill in all fields and then click **Submit** to save the settings.

3. Click **Reset** to clear all fields for fresh entry if required.

The administrator can use the Preference screen to setup the following:

10.1.1 Email alerts

Email alerts are emails generated by an automated process and sent to designated recipients. These actions consist of the standard text and list of recipients for an email.

In the **Preference** screen, **if Enable Email Option** is checked, then email alerts are sent for the following scenarios in the server:

- When a file version is changed
- An error occurs while uploading a file
- When a file is deleted

Type the email id and password from which the mail alert has to be sent. Add recipient mail ids in the **To** box and **CC** and **Bcc** boxes and other fields as applicable.

10.1.2 Enable Server File Version Delete Policy

Every time a user updates, restores or uploads a new version of an existing file, a new version of the file is created as well as a history of actions for each file.

The versions are retained so that users can view and optionally restore a version of a file. Over a period of time, the versions list can grow significantly.

To avoid a storage issue, you can define the number of latest versions of the file before permanently deleting the older versions automatically.

In the **Enable Server File Version Delete Policy** field, if you type 5, then latest 5 versions of the files are retained and all older versions are deleted automatically.

10.1.3 Idle Timeout

When this setting is configured, application logs out automatically after a specified period of inactivity. The default value for idle time-out is 60 minutes.

10.1.4 Merge File Count

When files are generated by instruments in SDMS, after the specified number of files in **Merge File Count** field is collected, the files are uploaded to the server / given location. For example, if the **Merge File Count** is 5, then after five files are collected, the same is uploaded to the server.

> ***Note:*** *In the* ***Merge File Count*** *field, you can type a number up to five digits.*

10.1.5 Download Link Logoff (Minutes)

The link shared in the **Server Data - File Information** tab to view the file for other users, will expire in number of minutes specified in the **Download Link Logoff (Minutes)** field. For example, if **Download Link Logoff (Minutes)** is 5, then the shared link expires in five minutes.

10.1.6 Lims Order Display

OrderID and BatchID should appear here. Only then on integration of ELN and LIMS with SDMS you can select and process orders in the Instrument Lock and Tag screen as shown in the figure:

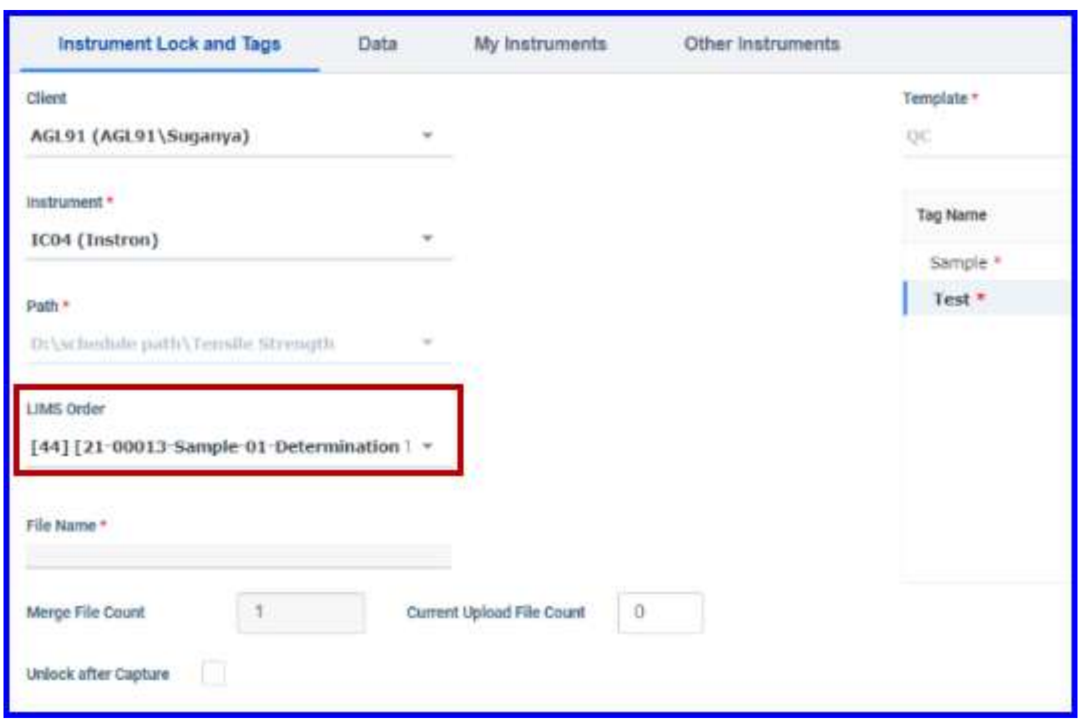


FIGURE: 91 - LIMS Order Display Option

10.1.7 Manual File Upload

When this check box is checked, manual upload of files are allowed in the server.

10.1.8 Scheduler Rights

When this option enabled, user can define access rights for the scheduler tasks in the User Management-Scheduler Rights tab.

10.2 License Information

1. On the main menu, click , and then click **License Information**. The screen appears as shown in the figure:

FIGURE: 92 - License Information Screen

Occupied License denotes number of instruments used or added

Available License denotes number of instruments shall be added

Click **Export** to export license information to Excel.

10.3 Setup Work Flow

Workflows can be designed based on logic in each stage. For example, the data captured from an instrument shall pass through the following stages in a workflow:

Workflow Stage	**Role Mapped**	**Workflow Status**
Assign	Analyst	Assigned
Analyze	Data Analyst	Analysis Completed
Verify	QC	Verified
Approve	QC Manager	Approved

Each stage in the workflow is mapped to a role. Once the data pass through a stage, the status of the data/file is changed to the next status. The data/file should pass through all the stages in the workflow to successfully complete the job.

You can design work flow by adding user groups to each work flow stage.

1. On the main menu click , and then click **Workflow Setup**. The screen appears as shown in the figure:

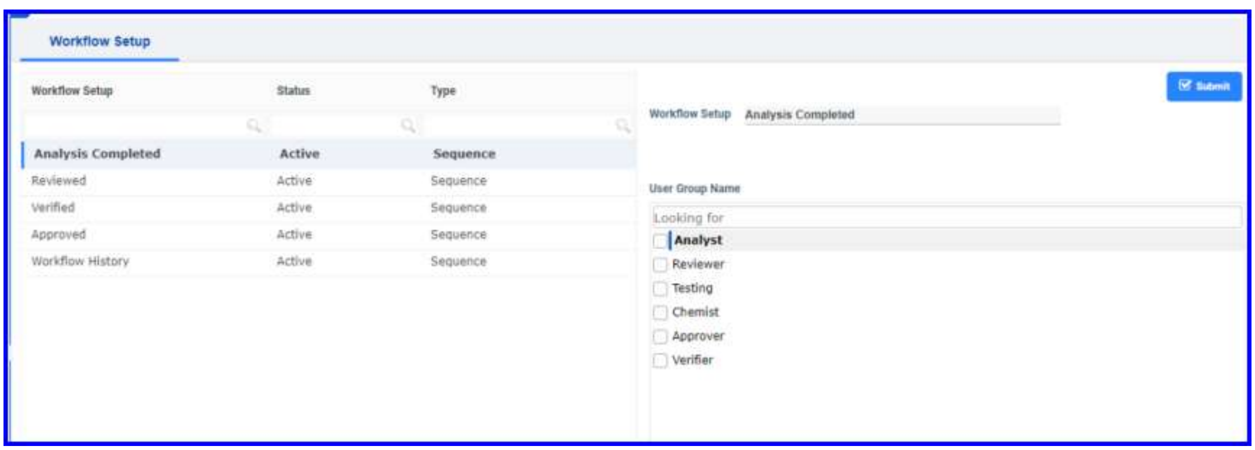


FIGURE: 93 - Work Flow Setup Screen

You can see the list of existing work flow steps on the left panel.

To create a new work flow, follow these steps:

2. In the **Work Flow Step** box, the current Workflow Step name selected is displayed.

3. Under **User Group Name** box, click to select the user group for the selected work flow step.

4. Set Workflow for each step by selecting respective User Group Name.

5. Click **Save**.

10.4 Audit Trail Configuration

Audit Trail Configuration screen helps you to configure audit trail. Also enables you to filter records based on specified duration, user and module name, export records to excel file, print records, create archive and open archive to view.

To view audit trail log, follow these steps:

1. On the main menu, click , **Preferences** and then click **Audit Trail Configuration**. The **Audit Trail Configuration** screen appears as shown in the figure:

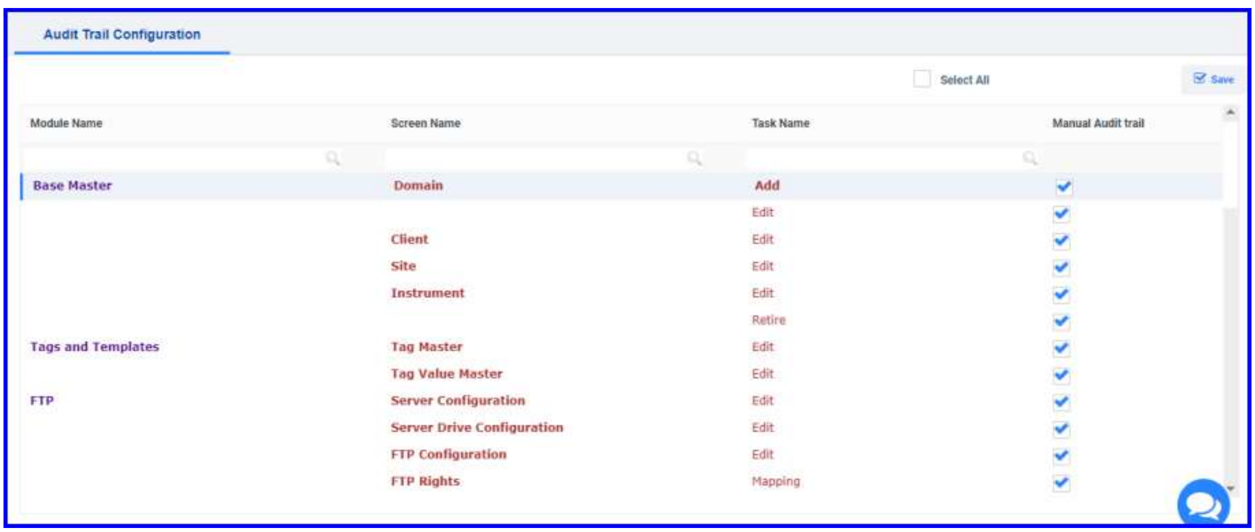


FIGURE: 94 - Audit Trail Configuration Screen

You can configure audit trail for tasks in the selected screen. To do so, follow these steps:

2. In the **Audit Trail Configuration** screen, you can see list of **Module Name**, **Screen Name** and then the **Tasks** in the screen.

3. To configure audit trail for a task, click to select respective check under **Manual Audit Trial** and then click **Save**. The E-Signature window will prompt for user name and password while completing that particular task.

4. Same way, you can configure audit trail for tasks in the other screens.

11 Additional Features in SDMS

Following additional features shall be integrated with SDMS on an as-needed basis:

11.1 Interfacer Settings

- Enables interfacer settings exe in client server.
- In instrument configuration enable/disable the interfacer instrument option.
- Scheduler – Enables option for RS232 and TCP/IP.

11.2 LIMS Integration

- Load ELN product and tests from LIMS system.

11.3 Empower

- Enables the Empower Scheduler item under scheduler menu.

11.4 Hide Template

- Enables or disables Template association.

11.5 Auto Unlock

- In the Instrument Lock screen, Unlock After Capture can be Enabled / Disabled. By Default, it is enabled if Auto Unlock is set as 1 in the Preferences screen.

11.6 Merge File Count

- **Merge File Count** option is applicable for interfacer instruments, RS-232 and TCP/IP. Multiple results will be captured in single file, until the instrument is unlocked.

11.7 Explore ClientAliasName

- If ClientAliasName is set true, then client selections will display client alias name not the client name

11.8 Explore InstrumentAliasName

- If InstrumentAliasName is set true, instrument selections will display instrument alias name not the instrument name