

USER MANUAL

Logilab SDMS Version v6.5_20211025_01





CONTENTS

1	Pre	eface	10
	1.1	Audience	10
	1.2	Documentation Accessibility	10
	1.3	Conventions	11
	1.3.	1 Commands	11
	1.3.	2 Keyboard	11
	1.3.	3 Notes	11
	1.3.	4 Warning	12
	1.3.	5 Callout	12
	1.3.	6 Description	12
	1.3.	7 Hyperlink	12
	1.3.	8 List of Common Controls in SDMS	12
2	Ge	tting Started	14
	2.1	First Time Login	14
	2.2	Login	15
	2.3	Understanding SDMS User Interface	17
	2.4	SDMS Main Menu	18
	2.5	SDMS Chat	• •
	4.0		20
	2.6	Profile Menu	
		Profile Menu	21
	2.6	Profile Menu 1 Edit Profile	21 21
	2.6 2.6.	Profile Menu 1 Edit Profile 2 Change Password	21 21 23
	2.6 2.6. 2.6.	Profile Menu 1 Edit Profile	21 21 23 24
	2.6 2.6. 2.6. 2.6.	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help	21 21 23 24 24
	 2.6 2.6. 2.6. 2.6. 2.6. 	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About	21 23 24 24 25
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. 2.6.	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About	21 23 24 24 25 25
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. 2.6.	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About 6 Logout	21 21 23 24 24 25 25 27
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. FT	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About 6 Logout P Data View Server Data Tab	21 23 24 24 25 25 25 27 27
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. 2.6. FT 3.1	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About 6 Logout P Data View 1 Search Server Data Tab	21 23 24 24 25 25 27 27 27 27 27
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. FT 3.1 3.1.	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About 6 Logout P Data View 1 Search Server Data Tab	21 23 24 24 25 25 27 27 27 32 38
3	2.6 2.6. 2.6. 2.6. 2.6. 2.6. FT 3.1 3.1. 3.1.	Profile Menu 1 Edit Profile 2 Change Password 3 Screen Lock 4 Help 5 About 6 Logout 7 Data View 8 Server Data Tab 1 Search Server Data 2 Action Controls	21 23 24 24 25 25 27 27 27 32 38 41





	6	5.1.4	Backup Schedule	
	6.2	,	View Edit Schedules	86
	6.3]	Monitor Scheduler	
	6	5.3.1	View upload schedules	
	6.4]	Local File Delete Scheduler	91
	6.5	1	Server File Delete Scheduler	91
	6.6		Auto Download Configuration and Download Scheduler	
	6	5.6.1	View Download Scheduler	94
	6.7		Client Service Monitor	95
7	Ι	[nst	rument Lock and Tags	
	7.1]	Data tab	97
	7.2]	My Instruments	
	7.3		Others Instruments	
8	τ	Use	r Management	
	8.1		Create user Group	
	8	3.1.1	Edit user group	
	8	8.1.2	Activate or deactivate user group:	
	8.2		Creating new user	
	8.2 8.3		Creating new user Other Options in the User Master Screen	
	8.3		Other Options in the User Master Screen	105
	8.3 8		Other Options in the User Master Screen Edit User	105
	8.3 8	3.3.1	Other Options in the User Master Screen Edit User Retire User Account	105
	8.3 8 8 8	3.3.1 3.3.2	Other Options in the User Master Screen Edit User Retire User Account Reset Password	105 105 106 106
	8.3 8 8 8 8 8	8.3.1 8.3.2 8.3.3	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock	105 105 106 106 106
	8.3 8 8 8 8 8 8	3.3.1 3.3.2 3.3.3 3.3.4	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive	105 105 106 106 106
	8.3 8 8 8 8 8 8 8 8	8.3.1 8.3.2 8.3.3 8.3.4 8.3.5	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve	105 105106106106106106107
	8.3 8 8 8 8 8 8 8 8 8	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve Import ADS	105 105106106106106107107
	8.3 8 8 8 8 8 8 8 8 8 8 8 8 8	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.6	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve Import ADS Export	105 105106106106107107107108
	8.3 8 8 8 8 8 8 8 8 8 8 8 8 8	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.6 3.3.7 3.3.8 3.3.9	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve Import ADS Export	105 105106106106107107107108
	8.3 8 8 8 8 8 8 8 8 8 8 8 8 8 8	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.7 3.3.8 3.3.9	Other Options in the User Master Screen. Edit User. Retire User Account Reset Password. Unlock Active/Deactive Approve Import ADS Export Import	105 105 106 106 106 106 107 107 107 108 108 108
	8.3 8 8 8 8 8 8 8 8 8 8 8 8 8 4	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.7 3.3.8 3.3.9	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve Import ADS Export	
	 8.3 8 9 	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.7 3.3.8 3.3.9	Other Options in the User Master Screen Edit User Retire User Account Reset Password Unlock Active/Deactive Approve	
9	 8.3 8 9 8 9 	3.3.1 3.3.2 3.3.3 3.3.4 3.3.5 3.3.6 3.3.7 3.3.8 3.3.9	Other Options in the User Master Screen. Edit User. Retire User Account Reset Password. Unlock Active/Deactive Approve. Import ADS Export. Import ADS Set access rights to user groups. Online Users. Setting up Password Policy.	



	9.1	1.1	Review and Review History	115
	9 .1	1.2	Create Archive and Open Archive	115
	9.1	1.3	Export Audit Trail History	116
	9 .1	1.4	Print Audit Trail History	116
	9.2	CFI	R Settings	116
	9.3	Dov	vnload Logs and Download Error Logs	117
	9.4	Upl	oad Logs and Manual Upload Logs	117
	9.5	Res	tore and Restore Error Logs	118
	9.6	Ser	ver and Local File Delete Logs	119
	9.7	Vie	wing Scheduler Config. Logs	120
10	Se	etting	35	121
	10.1	Pre	ferences	121
	10).1.1	Email alerts	122
	10).1.2	Enable Server File Version Delete Policy	122
	10).1.3	Idle Timeout	122
	10).1.4	Merge File Count	123
	10).1.5	Download Link Logoff (Minutes)	123
	10).1.6	Lims Order Display	123
	10).1.7	Manual File Upload	124
	10).1.8	Scheduler Rights	124
	10.2	Lice	ense Information	124
	10.3	Setu	ıp Work Flow	125
	10.4	Auc	lit Trail Configuration	126
11	A	dditi	onal Features in SDMS	128
	11.1	Inte	erfacer Settings	128
	11.2	LIN	1S Integration	128
	11.3	Em	power	128
	11.4	Hid	e Template	128
	11.5	Aut	o Unlock	128
	11.6	Mei	rge File Count	129
	11.7	Exp	lore ClientAliasName	129
	11.8	Exp	lore InstrumentAliasName	129



TABLE OF FIGURES

FIGURE: 1 - First Time Login Screen	14
FIGURE: 1a - First Time Login – Create Password Screen	15
FIGURE: 2 - Logilab SDMS Login Screen	16
FIGURE: 2a - Logilab SDMS Login Screen – More Information Section	17
FIGURE: 3 - SDMS Main Screen	
FIGURE: 4 - SDMS Main Menu	19
FIGURE: 5 - SDMS Chat Screen	21
FIGURE: 6 - Profile Menu	21
FIGURE: 7 - Profile Menu Showing Options	22
FIGURE: 8 - Edit User Profile Screen	23
FIGURE: 9 - Change Password Screen	23
FIGURE: 10 - Screen Lock Dialog	24
FIGURE: 11- About Logilab SDMS Dialog	25
FIGURE: 12 - Confirmation Dialog	26
FIGURE: 13 - Server Data Tab	27
FIGURE: 13a - Filter Files Based on Task Status	28
FIGURE: 13b - Server Data Tab - Version History Option	29
FIGURE: 13c - Server Data Tab – Share link Option	30
FIGURE: 13d - Server Data Tab – Workflow History Option	30
FIGURE: 13e – File Viewer Tab	31
FIGURE: 13f - Tags & Parsed Data Tab	31
FIGURE 13g – Multi Fields Dialog	32
FIGURE: 13h - Search Server Data Tab	32
FIGURE: 13i - By File Filter Screen	33
FIGURE: 13j - By Tag Filter Screen	34
FIGURE: 13k – Server Data Fetched - By Tag Filter	35
FIGURE: 131 - By Parameter Filter Screen	35
FIGURE: 13m – Save Filter Dialog	36
FIGURE: 13n – Multi Fields Chart View	37
FIGURE: 130 – Multi Fields Grid View	
FIGURE: 13p - Multi-file Status Update	

FIGURE: 13q – Updating Status of Multiple Files	
FIGURE: 13r - Audit Trail History	40
FIGURE: 13s -Attribute	40
FIGURE: 14 - Template View Tab	41
FIGURE: 15 - Data Logger Tab Showing Log in Grid	
FIGURE: 16 - Data Logger Tab Showing Log in Chart for the Selected Data Type and Channel	
FIGURE: 17 - Data Logger Tab Showing Log in the archive	
FIGURE: 17a - Data Logger Tab Showing Log in the archive – Chart View	
FIGURE: 18 - Domain Master Screen	46
FIGURE: 19 - Add Domain Dialog	46
FIGURE: 20 - Client Master Tab	
FIGURE: 21 - Add Client Screen	
FIGURE: 21a – Edit Client Screen	51
FIGURE: 22 - Print Client Master Dialog	
FIGURE: 23 - Instrument Master Tab	53
FIGURE: 24 - Add Instrument Screen	
FIGURE: 25 - Adding Interfacer Instrument With / No Parsing	56
FIGURE: 26 - Communication Setting Dialog	57
FIGURE: 26a - Communication Setting Dialog – Data Logger	
FIGURE: 27 - Print Instrument Master Dialog	61
FIGURE: 28 - Site Master Tab	
FIGURE: 29 - Add Site Dialog	63
FIGURE: 30 - Template and Tags Screen	64
FIGURE: 31 - Tag Master Tab	65
FIGURE: 31a – Add Tag Value	
FIGURE: 32 - Editing Tag Name	67
FIGURE: 33 - Editing Tag Value	67
FIGURE: 34 – Template Master Section	
FIGURE: 34a - Add Template	69
FIGURE: 34b - Template Mapping Tab	70
FIGURE: 35 – Template Mapping Tab – Configure Dialog	71
FIGURE: 36 - Tree view of Tags and Tag Values in the Template Mapping Screen	71



FIGURE: 37- FTP Configuration – Server Configuration Tab	72
FIGURE: 38 - Add Server Configuration Tab	73
FIGURE: 39 - Server Drive Configuration Tab	74
FIGURE: 40 - Add Server Drive Configuration Tab	75
FIGURE: 41 - FTP Configuration Tab	76
FIGURE: 42 - Add FTP Configuration Tab	77
FIGURE: 43 - FTP User Mapping View Screen	78
FIGURE: 44 - FTP User Mapping Entry Screen	79
FIGURE: 45 - Data Scheduler Screen	80
FIGURE: 46 - File Settings	81
FIGURE: 47 – UNC Credentials	82
FIGURE: 48 – Upload Policy	83
FIGURE: 49 – Setting up Backup Period – Without Data Logger	84
FIGURE: 49a – Setting up Backup Period – With Data Logger	84
FIGURE: 49b – File Audit Screen	85
FIGURE: 50 – Schedule Capture1	86
FIGURE: 51 – Schedule Capture 2	86
FIGURE: 52 - View Edit Scheduler Screen – Deactivated Task Tab	87
FIGURE: 53 - View Edit Scheduler Screen – Activated Task Tab	87
FIGURE: 54 - View Scheduler Screen-showing the Edit Task tab	88
FIGURE: 55 - Monitor Schedule - Upload Queue Tab	89
FIGURE: 56 - Monitor Schedule - Failed Queue Tab	89
FIGURE: 57 - Monitor Schedule - Upload Monitor Tab	89
FIGURE: 58 - Monitor Schedule - Restore Monitor Tab	90
FIGURE: 59 - Monitor Schedule - Download Monitor Tab	90
FIGURE: 60 - Local File Delete Scheduler Screen	91
FIGURE: 61 - Server File Delete Scheduler Screen	92
FIGURE: 62 – Auto Download Configuration Screen	93
FIGURE: 63 – Auto Download Configuration Success Message	94
FIGURE: 64 - View Download Scheduler Screen	94
FIGURE: 65 - Client Service Monitor Screen	95
FIGURE: 66 - Instrument Lock Settings Screen	96



FIGURE: 67 - Data Tab showing locked instrument details with files uploaded and tag details	98
FIGURE: 68 - Instruments Locked by the Current User	99
FIGURE: 69 - Instruments Locked by Other Users	100
FIGURE: 70 - User Management – User Master Screen	101
FIGURE: 71 - Add New Group Dialog	102
FIGURE: 72 - User Management - User Master Screen	103
FIGURE: 73 - Add User Dialog	104
FIGURE: 74 - Edit User Dialog	105
FIGURE: 75 – User Master - Import ADS screen	108
FIGURE: 76 - Import Users Dialog	109
FIGURE: 77 - User Management – User Rights Screen	110
FIGURE: 78 - User Management – Online Users Tab	111
FIGURE: 79 - Online User – Chat Screen	111
FIGURE: 80 - Password Policy Screen	112
FIGURE: 81 - User Management – Scheduler Rights Screen	113
FIGURE: 82- Default Audit Trail History Screen	114
FIGURE: 83- Expanded Audit Trail History Screen	115
FIGURE: 84 - CFR Settings Screen	116
FIGURE: 85 – Download Logs Screen	117
FIGURE: 86 – Upload Logs Screen	118
FIGURE: 87 – Restore Logs Screen	119
FIGURE: 88 – Local File Delete Logs Screen	119
FIGURE: 89 - Scheduler Config. Log Screen	120
FIGURE: 90 - Preferences Screen	121
FIGURE: 91 - LIMS Order Display Option	124
FIGURE: 92 - License Information Screen	124
FIGURE: 93 - Work Flow Setup Screen	125
FIGURE: 94 - Audit Trail Configuration Screen	126



1 Preface

This guide provides instructions about configuring and using Logilab SDMS.

This preface contains these topics:

- <u>Audience</u>
- Documentation Accessibility
- <u>Conventions</u>

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."



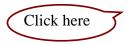
1.3.4 Warning

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.



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: <u>Click here to see how to setup FTP site</u>.

1.3.8 List of Common Controls in SDMS

The description of common controls in SDMS is listed below:

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

Edit	🖸 Edit	Enables edit the selected record in the master / form
Active / Deactive	X Active/De-Active	Enables activate / deactivate user / instruments
Retire	Retire	Will retire the selected user/record/instrument permanently
Filter	T Filter	Enables the user to search for files/records/details based on specified search criteria
Reset	C 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	C 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	Z 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 "<u>http://agl89:8080/LogilabSDMS/Login.html</u>" 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:

Logilab vs.6_20211925_01	Documents & Files
administrator	
Password	
More Information >	Instrument Data Logilob
Login	

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:



Logilab +6.5,282211625_01 10 MS Create Password	t	/	Documents & Files
Username Administrator			rites
Confirm Password		Instrument	CFR Gate
admin	<u></u>	Data	Logilab
Maximum Length 10, Uppercase Characters 0, Los Characters 0, Special Characters 0			0

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 <a> 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 "<u>http://agl89:8080/LogilabSDMS/Login.html</u>" and then press ENTER.

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



Logilab v6.5_30211025_01	Documents &
Usemame administrator	Files
Password	
More Information >	Instrument Logilab CFR Gateway
Logie	Data
Forgot Password	
	Database Application

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:



Username administrator				
Password				
			R	
More Information >		2	Documents &	
Site		/	Files	1
Chennai	· ·	1		1
Domain			1	
SDMS	¥			
Time Zone		Data	Logilab	CFR Gates
Asia/Kolkata (UTC+05:30)		X		1
			9	1
Language			Database	2
English			Application	

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:



Server Data Template View		s, workflow Status and Record Duration	TC+05:30) Domain: S	DMS Sine: Chennel Administrator
FTP Group Client Ton confg * AGL35 Records Duration Last 30 Days * T riter C	Instrument All Retresh ③ Configuration	tilter l	tion	lick here
Open 2 To Constant Q Restore AGL35/Multimeter01/multimetre Instrument	Folder Download 2. File Upland 27 Fold	rr Upford 🛛 Version History 🖉 West Version No Upload On	File Information	File Viewer Tags & Parsed
AGL35/Ionchromotography/ionchromotograph AGL35/Digimeter/digimeter AGL35/pulseoxymeter/pulseoxymeter	digimeter ionchromotography Liquidsamplers	1 2021-07-05 16:07:19 1 2021-07-05 16:00:43 1 2021-07-05 17:25:57	File Name Size Contains Login Username	digimeter 0 byte 0 Use chat A0L35\Sa
AGL35/Liquidsamplers/Liquidsamplers	multimetre instrument pulseoxymeter spectrometer	1 2021-07-05 15:31:57 1 2021-07-05 16:30:21 1 2021-07-05 17:51:02	Client Name Status	AGLISS With othe USERS
AGL35/spectrometer/spectrometer	spectrometer		Created On	

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:



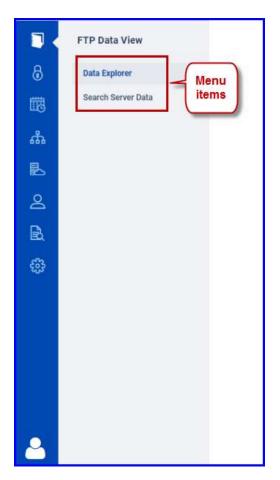


FIGURE: 4 - SDMS Main Menu

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 *Splace*. The chat screen appears as shown in the figure:

Messages			Select th
	Javan Pa AMAND Dervise 23 Ablance 2001 54 (0.11) NJ Anand	The * Annexed	user you want to
Received Prom ANAND University 12 January 2001 124 (2019) 905-302101		Type your	send
	Sector Tor AMARD Sectors, 31 American (2011) 51 (2012)	message	
	Please send AE000187 File	2	
View messages			
received from other users and			
messages sent	1	Click here to send the message	
4		3	
-			



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:

Server Data	Parsed Data Clie	Template View	Data Logg inst	itrument			Workflow Status		Records Duration Current Date	Change Password Screen Loch	
Triller Crimer	C Raturati 🛈 Ca									Help About Logout	
🕑 Open 🍐 File Down	ad O Restore	D Folder Deventoaat	(and a second sec	21 Polder Uptoad		Upload On	3 Watties His	File Informa	Cashein I tion File Viewer	Tags & Parsed Data	
			wine (Version No			File Name	The viewer		
		×	une								

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:



nologies	Administrator Administrator	\odot
Edit Prof	ile	2
Change	Password	a.
Screen L	ock	6
Help		?
About		i
Logout		•

FIGURE: 7 - Profile Menu Showing Options

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

Edit Profile				×
Usemame *				
Administrator				
Profile Name *				
Administrator				
Email ID				
NOTE - This mail to recovery the forgot password				
Profile Image				
		Choose File		
NOTE- Upload File should be less than 3 MB and supp	ported file type sho	uld be like [.gif, .png, .jpg	, jpeg, tiff, tif, img]	
Group Name				
Administrator				
Default Login Site				
Chennai	*			
Approve				
			🖬 Sübmit Clos	•



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:

Change Password		
Username		
ate02		
Old Password		
New Password		
Confirm Password		
*****	۲	
NOTE - Password Length must be within the specified range: Minimu Characters 0, Lowencase Characters 0, Numeric Characters 0, Speci	20 Cold CTANA COLD COLD COLD COLD COLD COLD COLD COLD	th: 10, Uppercase

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 \bigcirc 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:

Screen Lock	
Username *	
Administrator	
Password *	
	Degin Logout

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:

MS	×
Logilab Scientific Data Management System	
Version : v6.5_20211025_01 Licensed By :	
Copyright: Agaram Technologies (P) Ltd. All rights reserved	
More Service Information >	
	Close
	Logilab Scientific Data Management System Version : v6.5_20211025_01 Licensed By : Copyright: Agaram Technologies (P) Ltd. All rights reserved

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:

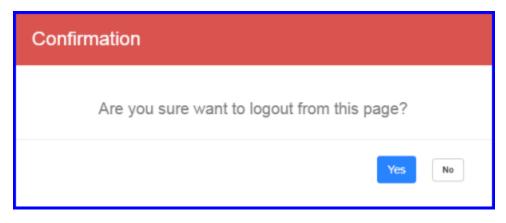


FIGURE: 12 - Confirmation Dialog

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:

Server Data	Data Logger	Task	Client, Instrume Status, Workflor nd Record Dura	W Domain	SDMS Site Chennel Administrator
Group Client confg * AGL35	Itstrument * All		Task Status	Worl	inflow Status
30 Days + Tiller (C Reset 💭 Refresh 🔘 Configurat	ion -			
		7 Folder Uploan	Concession Harmony Concession of		
Ion confg	Folder Download D. File Upload R	7 Folder Uploart Version No		File Information	File Viewer Tags & Parsed
Lon confg GL35/Multimeter01/multimetre instrument	Name	Version No	Upload On		
Lon confg GL35/Multimeter01/multimetre instrument GL35/Tonchromotography/Tonchromotograph	Name	Version No	Upload On 2021-07-05 16:07:19	File Information	File Viewer Tags & Parsed
Ion confg GL35/Multimeter01/multimetre instrument GL35/Ionchromotography/ionchromotograph GL35/Digimeter/digimeter	Name Di digimeter Di lonchromotography	Version No	Upload On 2021-07-05 16:07:19 2021-07-05 16:00:43	File Information	File Viewer Togs & Parsed
Ion confg GL35/Multimeter01/multimetre instrument GL35/Ionchromotography/ionchromotograph GL35/Digimeter/digimeter GL35/pulseoxymeter/pulseoxymeter	Name	Version No	Upload On 2021-07-05 16:07:19	File Information File Name Size	File Viewer Tags & Parsed digimeter 0 byte
Ion confg GL35/Multimeter01/multimetre instrument GL35/Ionchromotography/ionchromotograph GL35/Dipimeter/dipimeter GL35/Dipimeter/dipimeter GL35/Dipimeter/pulseoxymeter GL35/Liquidsamplers/Liquidsamplers	Name	Version No	Upload Om 2021-07-05 16:07:19 2021-07-05 16:00:43 2021-07-05 17:25:57	File Information File Name Size Contains	File Viewer Tags & Parsed i digimeter 0 byte 0
Ion confg GL35/Multimeter01/multimetre instrument GL35/Ionchromotography/ionchromotograph GL35/Digimeter/digimeter GL35/pulseoxymeter/pulseoxymeter	Name	Version No	Upload On 2021-07-05 16:07:19 2021-07-05 16:00:43 2021-07-05 17:25:57 2021-07-05 15:31:57	File Information File Name Size Contains Login Username	File Viewer Tags & Parsed I digimeter 0 byte 0 AGL35\Sangeetha.R
Ion confg GL35/Multimeter01/multimetre instrument GL35/Ionchromotography/ionchromotograph GL35/Digimeter/digimeter GL35/Digimeter/digimeter GL35/Digimeter/digimeter GL35/Digidsampiers/Liquidsampiers	Name	Version No	Upload On 2021-07-05 16:07:19 2021-07-05 16:00:43 2021-07-05 15:31:57 2021-07-05 16:30:21	File Information File Name Size Contains Login Username Client Name	File Viewer Tags & Parsed I digimeter 0 byte 0 AGL35\Sangeetha.R

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:



Server Data	Tempi	ate View	Data Log	ger.						
FTP Group Ion confg		Client AGL35			nstrument All	17.27.2	ct the		Task Status	
Records Duration	*	T filter	C Reset	C Refreed	Config	filte	r files		All Active Deactive Retire	
Dopen Artic		O Restore	D Folder Down	oad E	File Upload	Folder Uploa	6 E		ary @ make	
🕞 Ion confg			Name			Versi	on No L	lpload On		File Infor
AGL35/Multimete	r01/multime	stre instrument				Versi Q	on No L	lpload On	.59	
				Baser	I on the	Q.	9		05 16:07:19	File Name
AGL35/Multimete	otography/ic		t Iphr		I on the	9	9	2021-07-0		File Name Size
AGL35/Multimete AGL35/Ionchrom AGL35/Digimeter	otography/ic /digimeter	onchromotogra	t ph	electe	d status		۹ ۱	2021-07-0	05 16:07:19	File Name
AGL35/Multimete AGL35/Ionchrom AGL35/Digimeter AGL35/pulseoxyn	otography/ic /digimeter neter/pulseo	onchromotogra oxymeter	t ph	electe e files			9	2021-07-0 2021-07-05 2021-07-05	05 16:07:19 5 16:00:43	File Name Size Contains
AGL35/Multimete AGL35/Ionchrom AGL35/Digimeter AGL35/pulseoxyn AGL35/Liquidsam	otography/ic /digimeter neter/pulseo oplers/Liquid	onchromotogra ocymeter samplers	t Iph S th	electe e files	d status appears		9	2021-07-0 2021-07-05 2021-07-05	05 16:07:19 5 16:00:43 5 17:25:57	File Name Size Contains
AGL35/Multimete AGL35/Ionchrom AGL35/Digimeter AGL35/pulseoxyn	otography/ic /digimeter neter/pulseo oplers/Liquid	onchromotogra ocymeter samplers	t D S th	electe e files	d status appears ere		Q [1 1 1 1 1	2021-07-05 2021-07-05 2021-07-05 2021-07-05	5 16:00:43 5 17:25:57 5 15:31:57	File Name Size Contains Login Usernar

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
	File Download
	Restore
	Folder Download
	File Upload
Workflow Status	Folder Upload
worknow Status	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:

Server Data	iempi	ate View	Data Log	Jei				
TP Group		Client		Instrur	nent			Task Status
Ion confg	*	AGL35		* All			Ŧ	All
Records Duration								
Last 7 Days	*	T Filter	C Reset	C Refresh	Configuration			
🕞 Open 🕹 Fi	ile Download	O Restore	D Folder Deven		Upload IPT Fol	der Upload	C Version Histor	ry 🞯 Work C
🔁 Ion confg			Name			Version No	Upload On	
AGL35/Multime	eter01/multime	tre instrumen	it		9	Q.		(221)
AGL35/Ionchro	motography/io	nchromotogra	aphy 🔀 Ef	ect of Soil so	larization.xlsx	D 3	2021-07-06	5 18:12:50
AGL35/Digimet	er/digimeter		🖾 Ins	tron sample te	sts.pdf	1	2021-07-06	18:11:57
AGL35/pulseox	vmeter/pulseo	xymeter	D Ins	tron Test Syst	tem - Copy.pdf	1	2021-07-06	18:11:37
AGL35/Liquidsa			🖸 Ins	tron Test Syst	tem.pdf	1	2021-07-06	18:11:27
			🛛 🖂 Usi	ng the Instro	n Test System	1	2021-07-06	18:07:46
AGL35/spect		trometer	Re:	ource Require	ment of each cr.	2	2021-07-05	17:59:48
AGL35/ICPMOD)/icpmodbus1		Pro	tocol for folic a	cid.pdf	1	2021-07-05	17:58:16
	rs/ANALYZER		Eff	ect of solarizat	on on weeds.xls	<u>×</u> 1	2021-07-05	17:58:15
AGL35/Analyze								

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:



Server Data Template View	Data Logger			
🖻 Open 🕹 File Download 🛛 Resto	a ab robby Download Dr. File Uplan	I. 37 Fuller Opland 🗈 Variate History	() Work Complete	🔊 Workflow History 💊 Tag
Refresh I				
⇒ qa	Name	Version Upload On	File Informa	tion File Viewer Tags & Parsed Dat
AGL91/IC-03/PT-GCMS		Q Q ()		
AGL91/IC-01/AA3	Sampleaa11.pdf	1 2021-04-28 20:16:	Status	
AGL91/IC-02/GC-NPD	sampleaa10.pdf	1 2021-04-28 19:14:53	Created On	2021-04-28 20:16:46
	sampleaa9.pdf	1 2021-04-28 18:47:45	Modified On	2021-03-02 16:06:49
	AA3sdms28.txt	1 2021-04-27 12:47:17	Task Type	Scheduler Task
	ampleaa8.pdf	1 2021-04-27 12:36:39		Scheduler lask
	AA3sdms27.txt	1 2021-04-27 12:10:15	Source Path	D:\schedule path\AA3\sampleaa11. pdf
	sampleaa6.pdf	1 2021-04-26 13:06:13	Checksum	
	a sampleaa1.pdf	104-26 12:40:32	-	1771884814
	AA3sdms.txt	1 2-04-26 11:51:15	Share Link	http://agl91:8082/LogilabSDMS/Logi n.html?GUID=3dbe31a4-c19d-4026-
	a sampleaa5.pdf	1 2021-04-21 13:35:46		ba45-ab2bc7803ba4&TaskID=T2
	The second sector sector		1	6

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:

C Approve	3 Workflow History	Tag C Refresh
	File Information	File Viewer Tags & Parsed Data
:04:07	File Name Size	IC Instrument4-2.csv 0.79 KB
5:27	Contains	0.75 KB
	Login Username Client Name	AGL35\Sangeetha.R agl35
	Status	Verified
	Created On	2021-03-30 15:03:57
	Modified On	2021-03-30 15:03:57
	Task Type	Scheduler Task
	Source Path	E:\in2\IC Instrument4-2.csv
	Checksum	2542578815
	Share Link	http://AGL35:8080/LogilabSDMS/Login.htt

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:

Server Data Template View	Data Logger							
🖻 Open 🔺 File Download 🛛 Restore	D Faller Section D. The Optical	27 Faller		@ Work Complete	D Workflow History	• Tag		
7 Refresh 🚦								
∋ qa	Name	Version	Upload On	File Informati	on File Viewer	Tags & Parsed Dat		
AGL91/IC-03/PT-GCMS	Q	Q	(57)	1				
AGL91/IC-01/AA3	🛛 sampleaa11.pdf	1	2021-04-28 20:16:					
AGL91/IC-02/GC-NPD	ampleaa10.pdf	1	2021-04-28 19:14:53	1851 Availytical &	1851, Associations, AACR, 6, NY 52 Interview, Names,			
	🖾 sampleaa9.pdf	1 2021-04-28 18:47:45		Part - Fait, Inspire.				
	AA3sdms28.txt	1	2021-04-27 12:47:17					
	ampleas8.pdf	1	2021-04-27 12:36:39	1 813-883	(1079038) (1029-01-01	mass of Analysia Rowins		
	AA3sdms27.txt	1	2021-04-27 12:10:15	2 L / Dukkran Run Hezzh 1 VELEF-30	1 2022-01-01 11:03:04	Row Broge		
	sampleaa6.pdf	1	2021-04-26 13:06:13	Tenneter for	c Becalculate Stope Bundletts	iparatir Honis. Lilais fran Hadill'Ild.com		
	🖻 sampleaal.pdf	1	-04-26 12:40:32	Charactic .		present pr		
	AA3sdms.txt	1	-04-26 11:51:15	TRAIN Calibre, Fon Cyrra, Shanff, ter Rece	0 84/5 1 124600 2.3100 -4013	ng/1 ng/1 Linney Linney 1.9892 0.9992 -2992 -2992		
	ampleaa5.pdf	1	2021-04-21 13:35:46	Into Setaining Inepir Linit 1	10 10 10 10 10 10 10 10 10 10 10 10 10 1	212 44 1.3470 0.4700		
	TA constant at		**********************************	Dangle tim() 1	a da	Taxat Taxat		

FIGURE: 13e – File Viewer Tab

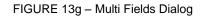
• In the **Tags and Parsed Data** tab, you can view the tag details and parsed data of the selected file. The **Tags and Parsed Data** tab appears as shown in the figure:

P Group on confg		Client AGL35		1.20	All	nent				Task Status All		2	Workflow Sta	dus.		
10	-	AGL35			All				-	<u></u>		-	All			
cords Duration ast 7 Days		T riber	C Rese	Ow	frends (C configurat	Son									
🔁 Open 🔺 File Down	bad	O Restore	12 Falser		B. You		9 Palani Syla			@ Work	Complete	D Work	dlow History	S Tot S	Refresh	
> Ion confg			N	ame			Vers	ion No	Upload On		Fib	e Inform	ation File	e Viewer	lags & Parse	ed Data
AGL35/Multimeter01/	multime	tre instrumen	t				G.	Q			Tags					
AGL35/Ionchromotog	raphy/ioi	nchromotogra	sph-	IC Instr	ment pa	rser method	LCSV	1	2021-07-06	15:59:18	Cate		/alue	Created By	Created On	5
AGL35/Digimeter/dig	imeter		2	IC Instr	menti -	COQV.CEV		1	2021-07-06	15:58:58	Gale	gury s	raise	Created by	created Of	
AGL35/pulseoxymete	r/pulseco	rymeter	1	AA3 L	ng.txt			1	2021-07-00	15:28:44	Ten	nplate	multitempl	Administra.	2021-07	-06 1
AGL35/Liquidsampler			1	IC Instr	ment1.c	<u>ev</u>		1	2021-07-06	15:26:31	Sam	ple E	Balance Mon	Administrator	2021-07-0	06 15:
	- S.										Test	(Optical Rotat	Administrator	2021-07-	06 15:
AGL35/spectrometer/	spectron	neter									Real		testest nnn	8 daslalateretes;	72574 207	n# 181
AGL35/ICPMOD/icpm	odbust										Parse					

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.
Q,	Q,	Q.	Q.	Q,	9	R.	Q.	Q,	
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



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:

Search Server Data				Saved Filter
	-			le 🕚 By Tag 🔘 By Parameter 🌒 🍸 Filter
🔁 Open 🔺 File Countral 🗘 Restore	D Folder Do	winload [1] [2] Window History	Work Comparie	History 🤄 Audit Trail History 📲 Attribute 📿 Refresh
File Name	Version No	Upload On	File Information	ile Viewer Tags & Parsed Data
9	9			
D Ion Chromatography	1	2021-05-05 12:14:41	File Name	Ion Chromatography
🗅 Insi	1	2021-05-03 15:21:12	Size	0 byte
GCNPD	1	2021-05-03 11:26:59	Contains	0
GCNPD1.pdf	1	2021-05-03 15:22:33	Login Username	AGL89\Preethi.R
GCNPDS.pdf	1	2021-05-03 14:26:00	Client Name	AGL89
GCNPD 2.pdf	1	2021-05-03 14:23:38	Status	
GCNPD4.pdf	1	2021-05-03 14:23:38	Created On	2021-05-05 12:12:30
GCNPD 1.pdf	1	2021-05-03 12:53:23	Modified On	
GCNPD RESULT PEST 20210303 ne	1	2021-05-03 11:28:10	Task Type	Scheduler Task
			Source Path	D:\Schedule path\lon Chromatography
			Checksum	10 2500.250

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:

Records Duration File Type Last 30 Days • Date Category Size >= FileUploadOn • Client Name • All • Instrument Name • All •	
Date Category Size >= FileUploadOn 0 Client Name GCNPD All -	
FileUploadOn Image: Client Name Client Name GCNPD All Image: Client Name Instrument Name Save Filter	
Client Name GCNPD File Name GCNPD Save Filter	
Client Name GCNPD	
All Instrument Name Save Filter	
Instrument Name	
- IIA	
(F a	bmit Clear Close

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:

			By Tag	
Records Duration			 Template 	
Last 30 Days	-	Select the	QC	· · · ·
Client Name		template and then	Category	Value
		select tag		9
Instrument Name		to search	Sample	Pantoprazole tablets IP 🔗
All	*		Test	Disintegration time
File Type				
All	*			
Size >=				
			Save Filter	2
				Sf Submit Clear Close

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:



Search Server Data					Saved Filter		
			Filter Info >	By File 🌒 🚺	By Tag 🥚 By Paramet	ter 🕘 🔽	Filter
🕞 Open 🔺 File Download 🛛 Restore	iD rolder Do	neriland 👘 Vermine History	Work Complete	D Workflow History	D Audit Trail History	E Attribute	C Refresh
File Name	Version No	Upload On	File Infor	mation File View	er Tags & Parsed D	Data	
GCNPD1.pdf	1	2021-05-03 15:22:33	File Name		GCNPD1.pdf		
GCNPD5.pdf	1	2021-05-03 14:26:00	Size		127.00 KB		
GCNPD 1.pdf	1	2021-05-03 12:53:23	Contains		0		
GCNPD_RESULT_PEST_20210303_ne	1	2021-05-03 11:28:10	Login Userna	Ime	AGL89\Preethi.R		
			Client Name		AGL89		
			Status				
			Created On		2021-05-03 15:22:31		
			Modified On		2021-05-03 14:09:35		
			Task Type		Scheduler Task		

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:

		B	y Parameter				
Records Duration						+ Add	Ø Clear
Last 30 Days	*	Logical Operator	Field Name	Relational Operator	1	ield Value	
Save Filter			Counts	1 -		5	
						Eff Subr	tit Close

FIGURE: 13 I - 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:

	Time Zone: Asia/Kolkata /UTC+05:30)	Domain: SDMS
Save Filter		×
Filter Name *		- 1
		a
	🗹 Submit	Cancel
		li a

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:



Logilab

FIGURE: 13n - Multi Fields Chart View

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

rom: 28/02/2021 To: 30/03/2021	D)			Chart	C Refres
ilter Condition: Anions.Bromide.Concentry	ation > 0				
Field Name	Field Value		Created On		
	3	С,			1
Anions.Bromide.Concentration	0.05		2021-03-30 13:00:13		
Anions.Bromide.Concentration	0.101		2021-03-30 13:00:13		
Anions.Bromide.Concentration	0.201		2021-03-30 13:00:13		
Anions.Bromide.Concentration	0.05		2021-03-30 14:35:27		
Anions.Bromide.Concentration	0.05		2021-03-30 15:03:37		
Anions.Bromide.Concentration	0.05		2021-03-30 15:04:07		
Anions.Bromide.Concentration	0.101		2021-03-30 14:35:27		
Anions.Bromide.Concentration	0.101		2021-03-30 15:03:37		
Anions.Bromide.Concentration	0.101		2021-03-30 15:04:07		
Anions.Bromide.Concentration	0.201		2021-03-30 14:35:27		
Anions.Bromide.Concentration	0.201		2021-03-30 15:03:37		
talana Assailda Passadantina	0.000		5031 03 38 IE-04-87		

FIGURE: 13o - Multi Fields Grid View

- For more information on FTP Group, refer <u>FTP Configuration</u>.
- For more information about Clients refer <u>Client Master</u>.

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:

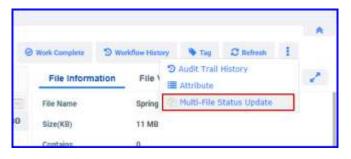


FIGURE: 13p - Multi-file Status Update

The Workflow Status screen appears as shown in the figure:

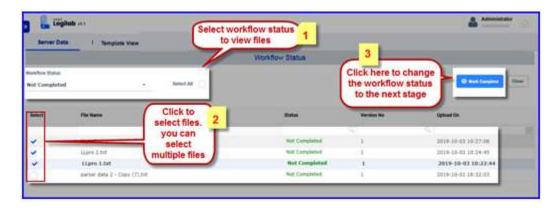


FIGURE: 13q – Updating Status of Multiple Files

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



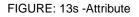
• Audit Trail History: Enables view audit trail history of the server data as shown in the figure:

Server Data	Template Vi	ew	Data Logger							
					Audit Trai	I Histor	y			
File Name		Client Name		Instrument Name		Reason	Comments	Audited By	Created On	System Comments
	а,		9		Q,	Q,	9		Q Q	q
GCNPD_RESULT_PE	EST_202103	AGL91		IC-02		Create	GCNPD_RESULT_PEST		2021-04-21 0	System Gener
									6	Print Close

FIGURE: 13r - Audit Trail History

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

Name : GCNPD_RESULT_PEST_20210303_new type Size : 127 KB Item Type : Adobe Acrobat Document Date Modified : 03-03-2021 10:24	
Item Type : Adobe Acrobat Document	
Date Modified : 03-03-2021 10:24	
Date Created : 21-04-2021 15:11	
Attributes : A	
Perceived type : Unspecified	- 1
Owner : AGL91\Suganya	- 1
Kind : Document	- 1
Rating : Unrated	





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:

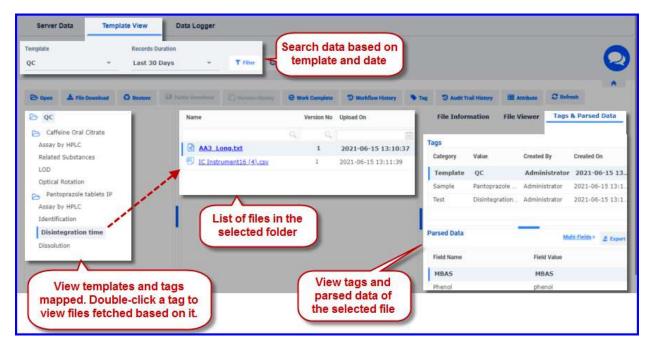


FIGURE: 14 - Template View Tab

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 <u>Instrument Lock and Tags</u>.

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:

Server Data	Template	• View	Data Lo	ogger										
FTP Group QC	-	Client agl35			Instrument All		Fro 25,	m /06/2021		To 25/06/	/2021			
T Filter C Reset	C Refresh													
		Data Type	вотн		•	Channel	All		Auto Refre	sti 🛞 🗌	🗠 Chart	Open Archive	C Refresh	A Export
₿ QC				Serial No	Reading	Unit	Channel	. mA	Created Or	()	Alarm		Lower_Al	arm Lower
agi35/ICPMOD/IC	PMOD			Q.	9	Q	9	9					Q.	Q.
				39	16.76428	F	81	17.64698	2021-06-	25 11:1			0	0
				40	16.76428	F	A1	17.64698	2021-06-	25 11:1			0	0
				41	13.76428	F	B1	14.64698	2021-06-	25 11:1			0	0
				42	14,75428	F	A1	15.64698	2021-06-	25 11:1.			0	0
				43	12.76428	F	81	13.64698	2021-06-	25 11:1			0	0
				44	16.76428	F	Al	17.64698	2021-06-	25 11:1			0	0
				45	17,76428	F	81	18,64698	2021-06-	25 11:0.			0	0
				46	17.76428	F	A1	18.64698	2021-06-	25 11:0			0	
				47	14.76428	F	81	15.64698	2021-06-	25 11.0			0	

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 **Chart** to view log in the chart form for all data types: Alarm / Reading / Both and for the selected channel as shown in the figure:



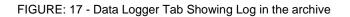


FIGURE: 16 - Data Logger Tab Showing Log in Chart for the Selected Data Type and Channel

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:

						Open Archive					
From		То		Data Type		Channel					
25/05/20	021	26/05/2021	(E)	вотн	*	All	*	T Filter	Let Chart	C Refresh	Z Export Clo
cheduler Pat	h: agl35/ICPM0D/ICP#	don									
Serial No	Reading	Unit	Channel ID	mA		Created On	Alarm			Lower_Alarr	n Lower_Wa
q	Q.	9	9		Q	(17)				Q	Q
1	17.76428	F	82	18.64698		2021-05-26 11:21:43				0	0
2	17.76428	E	A2	18.64698		2021-05-26 11:21:43				0	0
3	11,76428	F	B2	12.64698		2021-05-26 11:21:29				0	0
4	12.76428	E	A2	13.64698		2021-05-26 11:21:29				0	0
5	13,76428	F	B2	14.64698		2021-05-26 11:21:14				0	0
6	15.76428	F.	A2	16.64698		2021-05-26 11:21:14				0	0
7	12.76428	F	82	13.64698		2021-05-26 11:21:01				0	D
8	15.76428	F	A2	16.64698		2021-05-26 11:21:01				0	0
9	12.76428	F	B2	13.64698		2021-05-26 11:20:47				0	0
10	13.76428	F	A2	14.64698		2021-05-26 11:20:47				0	0
11	15.76428	F	B2	15.54598		2021-05-26 11:20:33				0	0
12	16.76428	F	A2	17,64698		2021-05-26 11:20:33				0	0



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:

- <u>Domain</u>
- <u>Client</u>
- <u>Instrument</u>
- <u>Site</u>
- <u>Templates and Tags</u>

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

Domain Client	instrument Site			(Click here to add n Domain to SDMS	
Domain Name	Category	Domain Status	q	Login Domain Name Created By	Administrator	
	Domains added S appears here	Active		Created On Modified By Modified On View log deta selected Do		Select a Domain and then click here to edit Domain details



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:

Add Domain	x
Name * Corpagaram	
Server IP/Name (Optional) 192.168.43.95	
Domain Username * SDMS	
Domain Password *	
Active 🖌	
	Submit Close

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 **G**, 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



Domain Client		Search client here	Click here to ad client to SDM	V
Client Name	Client Alias Name	Status	Client Type IP Address	Administrative 192.1 Select a client Click
ng135	johnson	Q. Active	Created By	Admin and then click here t
		1.0.000000000	Created On	2027- here to edit print details
	of clients added to MS appears here			adetails of ed client

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:



Add Client	×
Client Name *	
Client Alias Name *	
Client Type *	
Administrative	•
Active Gateway Client	
Instrument Name	Add
Looking for	
🖉 instname1	
2 ins002	
Z sdmins1	
CPMOD	
	Submit Close

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 dot to add an instrument to the client. <u>To see how to</u> 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 **bin**, and then click **Base Masters**. The **Base Masters** screen appears. Click **Client** to go to the client master tab. The Client Master tab appears.
- In the Client Master tab, click to select the client from the list you want to edit and then click Edit. The Edit Client screen appears as shown in the figure:

Edit Client		
Client Name *		
agi35		
Client Alias Name *		
admin		
Client Type *		
Administrative	*	
Looking for		Add
instname1		
ins002		
Sdmins1		
CPMOD ICPMOD		
	Siberi	Close

FIGURE: 21a - Edit Client Screen

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

Note:

Logilab

- 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 **bin**, 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 **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:

(j)	about:blank						
Cli	6/5/2020 Client Name ClientOne	Clivat Alias Name CO	CLIENT MASTER	Status DoAtive	Print	1 shee	t of paper
Cli					Destination		Ŧ
					Pages	All	•
					Layout	Portrait	•
					Color	Color	•
					More settings		~
						Date:	Canad
				51		Print	Cancel

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:

- <u>Add instruments</u>
- Edit instrument details
- Export Instrument Master to Excel
- Print Instrument Master
 - 1. On the main menu, click **base**, 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:

Domain Clie	ent Instrument		The Zone: A ck here to add nev strument to SDMS	selected instru	ment
Instrument Code	Instrument Allas Name	Status	instrument Model	Select an	Click here to
Analyzers	Analyzers	Active	Associated to Client	instrument and	export / print
ICPMOD	ICPMOD	Active	Created By	then click here	instrument
spectrometer	spectrometer	Active	Created On	to edit details	list
Liquidsamplers	Liquidsamplers	Active	Modified By		
pulseoxymeter	pulseoxymeter	Active	Modified On		
Digimeter	Digimeter	Active	Modified Un		
tonchromotography	Ionchromotography	Active			
Multimeter01	Multimeter01	Active	View log det	ails of	
ado	Multimeter01	Active	View log det selected instr		

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 + Add. The add instrument screen appears as shown in the figure:

Add Instrument		
Instrument Code * Ava pH01	Bable License: 15	
Instrument Alias Name * pH Meter		
Instrument Model * pH Meter		
Instrument Make * pH01		
Lock Type * Automatic		
Parser Type *		
Interfacer Mapped Active Interfacer Instrument *		
Create New	•	
	O Communication Settlege	Close

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:

Available License: 15				
Instrument Code * Avenue License: 15 pH01	Communication Settings			
Instrument Alias Name * pH Meter	Comm. Type FILE	*	Parity NONE	
Instrument Model * pH Meter	IP Address		Stop Bita	
Instrument Moke * pH01	TCP Port Number		Quita Bits	
Lock Type * Automatic. *	COM Port Number		Hand Shake	÷
Parser Type * InterFACER *	Baud rate		Termination Idle Seconds	
Interfacer Mapped 🧹 Active 🖌	Result Sample ID From IFACER			
Create New *			R Salari	Clase

FIGURE: 25 - Adding Interfacer Instrument With / No Parsing

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

Logilab

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:



Comm. Type		Parity	
FILE	*	NONE	× .
P Address		Stop Bits	
		4	
CP Port Number		Data Bits	
COM Port Number		Hand Shake	
		NONE	-
laud rate		Termination Idle Seconds	
Result Sample ID From		5	
IFACER			

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:

Edit Instrument	1 a faiter	nitt-State Sande State See Cherral Administ
Available License: 14	Communication Settings	х
ICPMOD	Comm. Type	Channel Number
Instrument Alias Name *	ICPMODBUS *	<u>6</u>
ICPMODBUS		Minimum Data Point
instrument Model *	IP Address 192,168.1.108	2
ICPMOD	TCP Port Number	Maximum Data Point
Instrument Make *	4001	
ICPMOD	1220	Conversion Type
Lock Type *	Minimum Current 4	NONE *
Automatic +	Maximum Current	Termination Idle Seconds
Parser Type *	20	5
NONE	Result Sample ID From	
Interfacer Mapped	IFACER *	
ICPMOD ICPMOD *		Core
O Communicat	lon Satisage 🛛 Salamit: Close	

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 **base**, and then click **Base Masters**. The **Base Masters** screen appears. Click **Instrument** to go to the Instrument master tab. The **Instrument** master tab appears.
- 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 **bin**, 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 **Base**, 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 **Base**, 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 Print. The Print screen appears as shown in the figure:

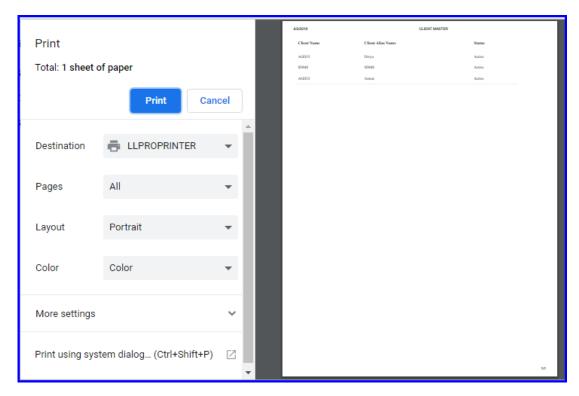


FIGURE: 27 - Print Instrument Master Dialog

- 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

Logilab

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

1. On the main menu, click **base**, 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:

Add Site	×	
Site Code *	Mobile No	
Site Name *	Fax No	
Site Address	E-mail	
Contact Person		
	Save Reset Close	

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.

oailab

4.5 Edit Site Details

To edit site details, follow these steps:

- 1. On the main menu, click **bin**, 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 Cod	de
--------------------------------	----

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 **field**, and then click **Template and Tags**. The screen appears as shown in the figure:

Tag Master Templa	ite Mapping			
Tag Master	+ Add CF Edit		on Hierarchy Structure	
Looking for		Template Type	Mapped O Unmapped	
Reaction		Template Master	Looking for	
DataFor			Test	
Trial			Project	+ Ant
Result			Method Development	Car tan
ARNo			Calibration	
BatchNo			QC	
Project				
Taut .	*			
Tag Value Master	+ And Cl' Edit	View Hierarchy	D TemplateHierarchy	
			Test	
Looking for			Project	
3				
2				

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:

	Add Tag	Tune Zone: Asla/Kolkata (UTC+05:30) Domain: SDMS 5	Site:
Aapping +	Tag Name * Fryability		
		Submit Close	pper
		Project Method Development Calibration QC	

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:



ag Value * ablet	+ Add	
Looking for Durability		× Delete
		/ Clear

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 <u>Creating Templates</u>.

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:



	Time Zone: Asta/Kolkata (UTC+05-30)	Domain: SDMs
Edit Tag		×
Tag Name * Fryability		
Гудышу		
	Submit	Close

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:

r	Time Zone: Asia/Kolkata (UTC+05:30)	Domain SDM5
Edit Tag		8
Tag Value Name * Tablet		an i
	Submit	
		Close

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:

🕽 🔒 Lögilab _{ve.4.,20200} va	я		Time Zane: Asia/Neksta (UTC+05:30) Demain: 50ME Site: Agaran Technologies	Administrator
Tag Mester Temp	late Mapping			
Tag Master	+ And CR man	Create Template based or Template Type	n Hierarchy Structure Mapped	- 1
Looking for		Template Master		
			Looking for	
Thei Result			Project Method Development	+ AND CP sole
			Calibration	CZ and
BatchNo			QC	
Project				
Test				
Sample		-		_
Tag Value Master	+ and 17 ten	View Hierarchy	2 Templatettierarchy	
Looking for			Project Sample	
Project-002			Test	
Project-001				
Method Development Project	:			
				0

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-tomany 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:



Template Name * PharmaTemplate Master Tag List TagNome Fryabilitytemplate Project Result Trial DataFor tagname	Add Template		×
TagName TemplateHierarchy Fryabilitytemplate Fryability Project Sample BatchNo Test ARNo Itest Result Itest Trial Itest	A ST DOIL DO D' DT.		
	E TagName Fryabilitytemplate Project BatchNo ARNo Result Trial DataFor	TemplateHierarchy Frynbility Sample	

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:



Tag Master	Template Mapping		
Template Type	Mapped		
Template Name	ProjectNumber List	*	% Mapping
View Template Mapp	PJ001		

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

4.6.3 Step III: Set Template Value

Tag Master Temp	state Mapping	Configure			×
Template Type	Mapped	Template Name PharmaTemplate			
Template Name	PharmaTe	TagName	TagValue		_
View Template Mapping	Phar	Fryability	Durability		- 1
				0	
				E	Close



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:

Tag Master	Template Mapping		
Template Type	Mapped O		
Template Name	PharmaTemplate	*	% Mapping
View Template Mappin	g PharmaTemplate Durability		

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:

- <u>Server Configuration</u>
- 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 **EXP**, and then click **FTP Configuration**. By default, the **Server Configuration** tab appears as shown in the figure:

Server Configuration	Server Drive Configuration	FTP Configuration		here to configure server to Logilab SDMS	+
Server None	Berver Type	Server Status	Is Terrical and FTP located in Same a Server	Ves	
	9	4 4	Created By	Administrator	Select a server configuration
AGL91	windows10	Active	Created Or.	2021-04-20 14:25:20	and then click
VI	ew list of		Mudified By	Administratur	here to edit
	servers		Modified On	2021-04-20 14 25:50	configuration details
con	figured in Ilab SDMS		View log details of the selected server		

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:



Add Server Configuration		×
Server Name * AGL35		
Server Type * WINDOWS 10	÷	
Server Username * AGL35\Sangeetha.R		
Server Password *		
Is Tomcat and FTP located in Same Server		
		Submit Close

FIGURE: 38 - Add Server Configuration Tab

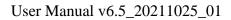
3. In the Server Name box, Type the PC name that you want to use as server.

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 **Edit**. 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:

Server Configur	ation Server Drive Configuration	en FTP Configuration	. (Click here to configure new server to Logilab SDMS	+ AM (27 200
Server Name	Drive Path	Status	Port No Created By	24 Administrator	
AGL91	D:\SDHEFTP	Active	Dreated On Modified By	2021-64-20 16:48:30	Select a server configuration and then click here to edit
	View list of servers configured in Logilab SDMS)	details	w log s of the d server	configuration details

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



Add Server Drive Configuration		×
Server Name * AGL91		
Server Drive Path * D:\SDMSFTP		
NOTE - Browse is not supported. Manually copy the path Port Number * 24		
Active 🔽		
	S 2	ubmit Close

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 **Edit**. 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:



Server Configuration	Server Drive Configuration	FTP Configuration		
		Add FTP Configuration		
Server Name * AGL91		Server Name/IP * AGL91 FTP: Server is connected Successfully	✓ Check	
Server Drive Path * D:\SDMSFTP		Virtual/Static IP (Optional) 192.168.0.25		
FTP Group Name *		Port Number * 24		
FTP Virtual Directory Name *		Active		
Read 🗹 Write 🐱				
				Submit Close

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 <u>Scheduler.</u>

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 **FTP Rights**. The **FTP User Mapping View** screen appears as shown in the figure:

			% Mapping	Export	e Prie
FTP Created In	FTP Alias Name	FTP Path	E:\ttp sdms\Sample Analysis		
	Q.	FTP Information	ftp://AGL35:26/Sample Analysis		
AGL35	Sample Analysis	Associated to User	Administrator, System		

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 **Select** Mapping. The FTP User Mapping Entry screen appears as shown in the figure:

FTP User Mapping		<u>×</u>
FTP Name		
QA/QA		
Group Name		
Administrator	*	
User Map Select All		
Users	Мар	
	Q.	
Administrator	~	
ATE159		
ATE160		
		Submit Close

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.
- 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 **Data Scheduler**. The Data Scheduler screen appears as shown in the figure:

File Settings	Upload Policy	Schedule Trigger/Expiry Schedule Capture On	
File Settings			
Client Name *		ELN Status	
agl35		Auto Enable Parsing Yes	
Instrument Code *		Path Type	
ICPMOD		Local Path	
		Source Path *	
Test Name		E:\Datalogger schedule	✓ Chec
		NOTE Browse is not supported. Manually copy the path	
Default Parser Method			
	<u></u>		

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

File Settings	Upload Policy	Schedule Trigger/Expiry Schedule Captu On	re
File Settings			
Client Name *		ELN Status	
agl35	*	Auto Enable Parsing Yes	
nstrument Code *		Path Type	
ICPMOD	*	Local Path	
		Source Path *	
Test Name		E:\Datalogger schedule	✓ Chec
		NOTE - Browse is not supported. Manually copy the path	
Default Parser Method			
	~		

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

UNC Credentials UNC Path		Destination * ftp config analysis	Ŧ
NOTE:- Browse is not supported	Check Manually copy the path	Filter	
Username	Password		
Domain			

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.

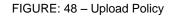
- 11. In the **Destination** box, select the storage server path to upload the files.
- 12. In the **Filter** box, type file extensions to filter files separating with comma. For example: *.txt, *.rtf, *.tmf. Files with specified extensions alone will be uploaded. To upload all files type "*.*".

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.



Data Scheduler					
File Settings	Upload Policy	Schedule Trigger/Expiry On	Schedule Capture		
Upload Policy Include Subfo			Delete local copy Files older than	Days	
Copy Files	Move Files(Do not lear	w local copy) 🏐 📄	Files older than	23/01/2021	



- 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:



Upload Policy Include Subfolder Complete Tree Level Level Copy Files Copy Files Move Files(Do not leave local copy)	Delete local copy Files older than Files older than 13/04/2021	-
Schedule Trigger/Expiry On Trigger on 13/04/2021 Expiry Date & Time 13/04/2021 Expiry Date & Time 13/04/2021	G	
File Delete Policy Apply Delete Policy for Server Files Enable file link	Compliance Policy Compliance Policy Enable Version Audit Audit Filter	Data Logger Data Logger Archival Days Older

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

Upload Policy Include Subfolder Complete Tree Level	Eites older than Days	
Copy Files 🔵 Move Files(Do not leave local copy) 🌒	Fites older than (01/04/2021)	
Schedule Trigger/Expiry On Trigger on 01/04/2021 16:25:31 (5)		
Expiry Date & Time 01/04/2021 16:25:31	0	
File Delete Policy Apply Delete Policy for Server Files	Compliance Policy Enable Version Audit	Data Logger Data Logger
Enable file link	Audit Filter	Archival Z Days Older

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:

FileAudit	
File Name O Type O Size (KB) O Login User Name 1 IC Instrument15 (A42) csv File 0.78 AGL35(Sargeetta 5	Status Upload On Created On Modified On File Version No Task Type Client Name Check Sum R 2021-06-18 11:03:49 2021-06-18 11:03:49 2021-03-30 11:43:40 1 Scheduler Task: agi35 261402215
	Audit Tail
	Usemane administrator
	Password
	Domain SDMS v
	Reason
	Delete ~ Conments
	Ne has been deleted
	V OK Oce

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

 Live Capture Live Capture Versioning One version Per Day Without Versioning 	
Live Capture Versioning 🔵 One version Per Day 🌒 Without Versioning 🌒	

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.

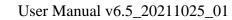
Live Capture		
One Time 🦲	Daily Weekly Monthly	Without Versioning
	Day 12/10/2019	

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 **Wiew Edit Scheduler**. The View Scheduler screen appears as shown in the figure:

Deactivated Task	Activated Task	Retired Task	Edit Task						
					@ View	🛩 Activate	Ø Retire	Z Export	🖨 Prin
Instrument Alias N Task ID	Client Name	FTP Alias Name	Live Archive	Task Name		Scheduler			
Q.	Q.)	9		Source Path		D:\Schedule pat	h\GCNPD		
GCNPD TS1	AGL89	Quality Assura.	. V	First Cycle Status		Completed			
				Empower Status		Scheduler			
				UNC Status					
				Task Status		DeActive			
				Client Status		Active			
				Instrument Status		Active			
				Start Date		2021-05-03 11:2	25:48		
				End Date					
				Trigger Time		2021-05-03 11:	25:48		
				Schedule Mode					

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:

Deactivated Tas	5 M	Activated Task	Retired Task	Edit Task						
						@ View	IQ Deactivate	Ø Retire	Z Export	🖨 Pr
nstrument Alias N	Task ID	Client Name	FTP Alias Name	Live Archive	Task Name		Scheduler			
Q.		Q.	9 9		Source Path		D:\Schedule pat	\lon Chromato	graphy	
lon Chromato	TS3	AGL89	Quality Assura	. Z	First Cycle Status		Completed			
ns1	T\$2	AGL89	Quality Assurance	1	Empower Status		Scheduler			
					UNC Status					
					Task Status		Active			
					Client Status		Active			
					Instrument Status		Active			
					Start Date		2021-05-05 12:1	1:27		
					End Date					
					Trigger Time		2021-05-05 12:1	1:27		
					Schedule Mode				0	

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

You can edit only a deactivated schedule. On the Edit Task tab, select the schedule you want to edit and then click



De-activated Ta	sk	Activated Task	Retired Task	Edit Task				
Instrument Alias Na LLPRO Inter	Task ID TS3 TS1	Client Name SDMS SDMS Select t task to edit fro the lis	m	Live Archive	Task Name Source Path First Cycle Status Empower Status UNC Status Task Status Start Date End Date Trigger Time Schedule Mode Next schedule date time Last Schedule Date Time	Scheduler D:\FTP insrtuments(27)\ELN Completed Scheduler 01 Oct 2019 18:30:53 01 Oct 2019 18:30:53 16 Oct 2019 11:52:17 16 Oct 2019 11:52:17	Click here to edit	ê Past
					Created By	Administrator		

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 **I**, and then click **Monitor Schedule**.
- The **Upload Queue** appears as shown in the figure:



Upload Queue	Failed Queue	Upload Monitor	Restore Monitor	Download Monitor			
						View Details	🕼 Update Schedule Mod
Client Name	Instrument Name	Live		FTP Name	Quality .	Assurance	
	Q	Q,		Task Status	Active		
AGL89	IC03		×	Schedule ID	TS2		
AGL89	IC04		1	Task ID	T2		
AGL89	1C02		×	Source Path	D:\Sche	dule path\ins1	
				Queue	0		

FIGURE: 55 - Monitor Schedule - Upload Queue Tab

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

Upload Queue	Failed Queue	Upload Monitor Res	store Monitor	Download Monitor		
						View Details
Client Name	Instrument Name	FTP Name		Task Status	Active	
	9	9	Q,	Schedule ID	TS2	
AGL89	1C03	Quality A	ssurance	Task ID	72	
AGL89	IC04	Quality Ass	urance	Source Path	D:\Schedule path\Ins1	
AGL89	IC02	Quality Ass	urance	Queue	0	

FIGURE: 56 - Monitor Schedule - Failed Queue Tab

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

Records Duration								
	¥	T Filter	C Refresh					
								,
Client Name		Instrum	ent Name		TP Name	Task ID	τı	
		Q.		-Q,		Schedule ID	TS1	
AGL89		IC02			Quality Assurance	Source Path	D:\Schedule path\GCNPD	
AGL89		IC03		3	Quality Assurance	No of Upload File Count	6	
AGL89		IC04			Quality Assurance			

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:

Upload Queue	ľ	ailed Queue	Upload Monito		Restore Moni		Download Monitor Records Duration	Nur		iles resto rs here	ored	
AGL89	*		chedule path\GCNP	•D •	Fire Mattie		Current Date	*	T Filter	C Refresh	A Export	
												. A
Client Name		File Name			Task Status		Source Path	GC	1PD			
	Q.			Q,		Q.	Туре	Fold	ler			
AGL89		GCNPD			Done		Restore Location	D:\\\$	Schedule path			
AGL89		GCNPD 1.pdf			Done		Error Description					
AGL89		GCNPD 2.pdf			Done		Restored By	Adm	ninistrator			
AGL89		GCNPD_RESULT	_PEST_20210303_ne	w type (Done		Restored On	202	1-05-11 09:55:	55		
AGL89		GCNPD4.pdf			Done							
AGL89		GCNPD5.pdf			Done							

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:

Upload Queue	Failed Queue	Upload Monitor	Restore M	lonitor	Download Monitor	1		of files de ppears h		ed
Client Name AGL89	* DT7_T1_D:\Se	hedule path\GCNPD =	File Nam	•	Records Duration		T Filter	2 Refresh	Z Export	
Client Name	File Name		Task Status		Source Path	GC	NPD			A
Contraction of Contraction	9		2	Q	Туре		lder			
AGL89	GCNPD		Done		Download Location	D	Schedule path	Download		
AGL89	GCNPD 1.pdf		Done		Error Description					
AGL89	GCNPD 2.pdf		Done		Downloaded By	Ad	ministrator			
AGL89	GCNPD_RESULT_	PEST_20210303_new type	Done		Downloaded On	20	21-05-11 09:56	48		
AGL89	GCNPD4.pdf		Done							
AGL89	GCNPD5.pdf		Done							
AGL89	GCNPD		Done							
AGL89	GCNPD 1.pdf		Done							
AGL89	GCNPD 2.pdf		Done	*					1	0

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.

ient Name		Records Duration									
DMS	*	Last 1 Year	*	T Filter	C Reset						
											*
								Select All	⊘ Aumorize	🖨 Print	Export
Select		File Name		Client	Name		Source Path				
				Q.		Q,	Upfoad On				
							Delete On				
							File Version On				

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:

Client Name SDMS	*	Records Duration	*	T Filter	C Reset						
								🖌 Select All	@ Authorize	🖨 Print	A Expor
Select		File Name		Clien	t Name		Source Path				
				0		Q.	Upload On				
							Delete On				
							File Version On				
		No data to	disnlav								

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:



Auto Download Configuration	View Download 1	Scheduler		
Source Instrument Name * HY01		UNC Credentials Username	Password	8.
Schedule Path * E:\Schedule path\HYGROMETER01	ा. 	Domain NONE	÷	
D ownload Client Name *		Filter		
AGL35	*			
.ocal Path * EllSchedule path/HYGROMETER01	ið:	Check		

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:

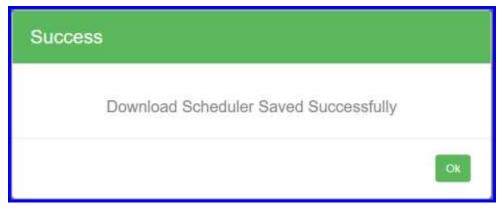


FIGURE: 63 – Auto Download Configuration Success Message

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:

			Dermain: SDMS	Site: chennai		ta 🙂
	E View	🗸 Active	P Deactive	S Rotite	A Expect	🖨 Print
UNC Status	Download Client Name Download Path					
	Task Status Task Filter					
	Task Completed					
	0	UNC Status Download Client Name Download Path Task Status Task Filter Task Completed	UNC Status Download Client Name a Download Path E Task Status D Task Filter - Task Completed P	UNC Status Download Client Name ag135 Download Path E:\sdrns-schedular Task Status Desclive Task Filter ::, Task Completed Pending	UNC Status Download Client Name agi35 Download Path EAsdme-schedular Task Status Deactive Task Filter **, Task Completed Pending	UNC Status Download Client Name agi35 Download Path EAsdms-achedular Task Status Deactive Task Filter **, Task Completed Pending

FIGURE: 64 - View Download Scheduler Screen

- You can select a schedule and then click to view schedule details.
- Select a deactivated schedule and then click <a>Active to activate.
- Select an active schedule and then click CP Deactive to deactivate the schedule.
- Select a schedule and then click 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 **Lieb**, and then click **Client Service Monitor**. The **Client Service Monitor** screen appears as shown in the figure:

Client Name All	*	Service Name	All		*	T Filter C Refresh	
List of Client/Server	Service Name			Status		Last Modified Date	2021-09-13 11:20:0
	2		.0.		Q.	Start DateTime	2021-11-30 13:35:3
AGL35	RoboticsServiceManager			Running		Running DateTime	2021-11-30 15:07:2
AGL35	FTPConfigService			Running			
AGL35	RoboticsFileDownload			Running			
AGL35	RoboticsFileWatcher			Running			
AGL35	RoboticsFileMonitor			Running			
AGL35	RoboticsPatchService			Running			
AGL35	RoboticsFileUpload			Running			

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 <u>Template Data Tab</u>.

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:

Client AGL35 (Sangeetha)	Template * Select instrument multitemplate - Select instrument and template
Instrument * Multimeter01 (Multimeter01) This Instrument is already auto locked Path * E:\Schedule path\multimetre instrument LIMS Order (20210705102158001] [FromInst] [FromIr File Name *	Tag Name Tag Value Sample Image: Constraint of the constraint of th
Merge File Count 1 Current Upload File Count 0 Unlock after Capture 1 1 1	Let a superior

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. <u>View Template Data tab</u>.

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:



Instrument Lock and Tags	Data My I	nstruments	Other Instruments			
Instrument *						
Timer	*					
Instrument Tag Information						
Template:			Default			
Default:			Default			
Latest Merged File Information					MergeData	ViewNullData
						C Refeest
						2.2 Retresh
Rawdata ID			Sequence No		Merge File Count	
	9,			9		Q
Manual File Raw Date			No data to display			
Merged File Raw Data						
File Information						C Refresh
File Name			Upload Status	Client Name		
	٩.				0	
			No data to display			
File Tag Information						
File Raw Data						
Parsed Data						
						0
						S

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:

Instrument Lock and Tags Data	My Instruments	Other Instruments			
ocked Instrument Details					S Refresh
Instrument Name	Status		Task Source Path	Template Name	
	Q.			Q.	
Hygrometer 2021-11-29 13:23:52			E:\Schedule path\HYGROMETER01	Default	
Chromotography 2021-11-29 14:07:28	A		E:\Schedule path\CHROM01	Default	
Fluorometer 2021-11-29 18:02:56	•		E:\Schedule path\FLUROM	Default	
te Information					2
e Information					C Refresh
		Upload Status	Client Name		C Refresh
le Information File Name	q	Upload Status	Client Name	Q.	C infresh

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:



i iijaa				1	in the factoring (Tori III) Thread 2000 and Agree Schulleg	Adventured
instrument last not high	See Hyrothe	ners Diversity	ewett.			
Locked Instances Indust-						-
Manthan	Longer Landson	the .	and the second s	Taket Strategy Public	Teriptali Nare	
			no beta	te distrav		
Pia constallant						
The Name			Optimal Distor	Ellerd Name		
			fre liefa	ie maler		

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 A, and then click User Management. The User Group screen appears as shown in the figure:

User Group Use	er Master User Rights	Online Users	Click here to add new user
User Group Name Administrator	Status Q. Active		Greated By Administrator Created By Administrator Created On 2021.07.05 12:09:09 Click here to update details of the
Analyst Reviewer Tester Chemist Approver	Active Active Active Active Active		Medified On Selected user group Click here to activate or deactivate selected
Verifier	Active		user group
	ew list of user oups added to		
C	SDMS		

FIGURE: 70 - User Management – User Master Screen

2. In the User Group tab, click Add New Group. The Add New Group dialog appears as shown in the figure:

	Time Zone: Asia/Kolkata (UTC+Q5:3
Add New Group	×
Group Name * Analyst	
Analyst	
	Ad
	Submit Close 20
	Giose

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 Oser Management. In the User Management screen, click User Master. The User Master tab appear as shown in the figure:



	a di manan								
oup Name Adm	inistrator *	de Add 🖸 Edit	@ Retire U Reset Password	f 🖬 Unlock	Active/Deactive	Approve	EE Import ADS	A Expert	A import
Username	Profile Name	User Group Name	User Status	Email ID		peter@gmail.c	om		
	L I	94)	Q Q	Profile Image					
ATE005	peter	Administrator	Unapproved	Last Logged On					
ATE004	steve	Administrator	Active	Password Expired On					
4TE003	john	Administrator	Retired	Created By		Administrator			
ATE002	chris	Administrator	Deactive	Created On		2021-07-06 16	:47:28		
ATE001	Andy	Administrator	Active	Modified By					
Administrator	Administrator	Administrator	Active	Modified On					
				Domain		SDMS			
				Site Name		Chennai			

FIGURE: 72 - User Management - User Master Screen

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



Add User				×
Usemane * ATE001				
Profile Name * andy				
Email ID andy@gmail.com				
NOTE:-This mail is to recover the forget password Profile Image				
andy.jpg		Choose File	*	
NOTE: - Upload File should be less than 3 MB and supp Group Name	orned file types are	r gr, prij, pg, gwg	.un, 10, ang	
Administrator	*			
Default Login Site				
Chennai	*			
Approve				
			8 Salarit	Cinee

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

Edit User	*
Username *	
ATE004	
Profile Name *	
steve	
Email ID	
steve@gmail.com	
NOTE - This mail to recovery the forget password	
Profile Image	
	Choose File
NOTE: Uplued File should be less than 3 MB and supported file type s	would be like [.gd, .progjpg, .jpeg, .tiff, .tif, .krsg]
Group Name	
Administrator *	
Default Login Site	
Chennai -	8
Approve	
	Submit Close

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
- 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

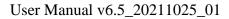
In the **User Master** tab, select the user account and then click **CRESET Password**. The user is allowed to reset the password on their next login.

8.3.4 Unlock

User account will be locked after three consecutive invalid password entry attempts. Select the locked user account and then click **Inlock** 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
- 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 **IC** 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:



User Group User Masser User Rights Import ADS Overs		Online Users	Select Domain, type valid credentials and then click Connect		
erver Damain * 92.168.0.250 =	Upersame * ate 127	Patiented *	Time	Click here to select all users to	Group Name Administrator
int of ADS Groups Jocking her Cultoperations Qualis_Lime WIRSC HelpLDraryOpdaters IQLServer20055QLBrowsert	Neršabatcen	List of ADS Users 5e	Approvi AB Commany Attoolo attool attool	approve	4 Apres
Attendancemeb Dea software users Ira-administrators Query_RLD	View list of ADS groups in the selected domain	Click to sele	476057 #76094 #76052	5 Click here to import the	

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:



Import Users	×
File* Choose File No file chosen	
NOTE:- Allowed browse file extension are .xls and .xlsx	
	Lupload Close

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 **A**, 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:

Logilab vit.6_20210701			Time Zone	- Asie/Kolkata (UTC+05:30) Domain:		dministrator
User Group User	Master User Rights	Online Users				
iroup Name Administrator	-	Select All				Print Ser
Module Name	Task Name	Create	Edit	Delete	Allow	
	9	9,				
Data Explorer	Open	NA	NA	NA	~	
	Download	NA	NA	NA	×	
	Restore	NA	NA	NA	~	
	File Upload	NA	NA	NA	~	
	Folder Upload	NA	NA	NA	~	
	Set Tag	NA	NA	NA	~	
	Audit Trail History	NA	NA	NA	~	
	Attribute	NA	NA	NA	-	
	Filter	NA	NA	NA	-	
	File Viewer	NA	NA	NA	~	
	Share Link	NA	NA	NA		
ELN Data Explorer	Open	NA	NA	NA	2 2 2 2 2 2 2 2 2 2 2 2	
	Download	NA	NA	NA.	~	

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 **A**, 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:



iogilab	v6.5_20216701_01			Time Zone: Asia/Kolk	iata (UTC+05:30) Domain: SDMS Site:	Chennel Administrator
User Group	User Master	User Rights On	line Users			
Username ATE001	Andy List of users of logged in S appears I	User Group Name Administrator	Login Status	Last Logged On Password Expired On Created By Created On Modified Dy Modified On Details of the selected use 2		And Click here to chat with the selected user 3 that notification shows number of unread messages

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:

> Logilab v4.5_20210701_01		Time Zune: A	ala/Kolkata (VTC+05:30) Domain: SDMS	Site: Chennai	Administrator	0
Messages		8 Clear				
Received From ATE001 Tureday, 64 July 2821 12 03 13	Sent To ATE001 Tuesday, 96 July 3021 12.01/22 Hii Anand		To " ATEOD1 Message "			
Yes Admin	Sent To ATEOO1 Turnday, 06 July 2021 12:04:10 Can you please send me the report file.					
				1 tent	S Clear Clos	
					C	2

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 A, and then click **Password Policy**. The Password Policy screen appears as shown in the figure:

Password Policy		
Database Based Login Minimum Password Length(Between 4 and 20 Charactera) 4	Complex Password Policy Complex Password Policy	🗹 Save
Maximum Password Length(Between 4 and 20 Characters) 10	NOTE:- The total length of complex password must be greater than or equal to minimum password length and less than or equal to maximum password length. Minimum number of Uppercase characters 0	
Password History(Between 1 and 5 Times) 5	Minimum number of Lowercase characters 4	
Password Expiry(Between 1 and 180 Days) 90	Minimum number of Numeric characters 0	
Autolock Policy(Between 1 and 5 Times) 3	Minimum number of Special characters 0	
		0

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 **2**, 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:

Logi	liab				The Desident Ada Balka	in (1972-1973) Sciencific Miller Mills Agaretic Fortheologies	Administratur
Imag Name	Administrator		Usersame	Administrator	- Select All		R to
	Administrator						
Tank ID	Analysta Reviewer			Altern	FTP Alas Name	00/00	
	Testing				Secree Park	D/Unitraments/Unitractoredian	
154		1001		191	Created Date	2221-01-23 10.35.29	
19.3		icor		~			
163		1000		4			
754		00.04		*			

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:

Audit 1	Trail History CFR	Settings					the filter		
Username : A	All Module	Name : All	From : 06/05/	2021 To	06/05/2021				-
				D Review History	Review	Create Archive	Open Archive	A Export	🖨 Print
Select	Module Name	Actions	Transaction on	Review Status	Requ	Comments	Viewed Audit	frail History	
		Q Q			-	Username	Administrator		
	Audit Trail	View AuditTrail Hi	2021-05-06 16:44			Profile Name	Administrator		
" .D.	Audit Trail	View AuditTrail History	2021-05-06 16:44:05			System Comments	System Gener	ated	
	Password Policy	View Password Policy	2021-05-06 16:42:12			Review Comments			
	User Management	View User Group	2021-05-06 16:42:11			Reviewed By			
	User Management	View User Group	2021-05-06 16:41:47			Reviewed Date			
	User Management	View User Group	2021-05-06 16:39:46			Modified Data			
	User Management	View Online User	2021-05-06 16:39:25			mouther pain			
	User Management	View User Master	2021-05-06 16:38:49		*				
4									

FIGURE: 82- Default Audit Trail History Screen

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



All	*	Module Nam		Audit Type All		Records Duration		T Film	C finant			
							D Review Manary	Review	E Create Archive	Quen Archive	Z topot	
Select	Module Name		Actions	Transaction on	Review	v Status	Reque: *	Comments		Viewed AuditTrail Hist	ory	
							Q	Usemane		Administrator		
	Audit Trail		View AuditTrail History	2021-05-20 12:50:1				Profile Name		Administrator		
	Audit Trail		View AuditTrail History	2021-05-20 12:50:16				System Comr	nenta	System Generated		
	Audit Trail		View AuditTrail History	2021-05-20 12:50:16				Review Came	iente			
	Audit Trail		View AuditTrail History	2021-05-20 12:50:13				Reviewed By				
	Audit Trail		View AuditTrail History	2021-05-20 12:50:13				Reviewed Dat				
	Instrument Lock		View Instrument Lock An.	2021-05-20 12:50:10				Modified Date				
	Audit Trail		Print the Audit Trail	2021-05-20 12:49:12				WOMPSETE MED				
	Audit Trail		View Aud&Trail History	2021-05-20 12:48:21								
	Audit Trail		View AuditTrail History	2021-05-20 12:48:20								
	User Management		Update User Group	2021-05-20 12:41:46								
	User Management		Insert User Group	2021-05-20 12:39:17								

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 \square , and then click Audit Trail History. Click to go to the CFR Settings tab. The screen appears as shown in the figure:

Logilab vs.s_20210412_02		Time Zone: Asia/Kolkata (UTC+05:30) Domain: SDM3 Ette: chennel	Administrator
Audit Trail History CFR Settings			
General Settings			
Enable Audit Trail *		Looking for	
		Activated	
Enter Reasons to Add		Approved	
	+ Add 🖹 Remove	Checked	
		Created	
		Deactivated	
		Mapped	
		Modified	
		Not Approved	
		Retired	
		Reviewed	
		Started	
		Stopped	

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:

Client Name ag135 * All * Cast 7 Days * Time C Infram 2 File Name Records Duration Client Name Task Status File Name Size 0.782226 Client Name Size 0.78226 Client Name Si	
ag135 Scheduler I I I Instrument16.csv Q Version No 1 Download Location	
R R Version No 1 agl35 Scheduler IC Instrument16.csv Download Location 1	
agi35 Scheduler 🗐 IC Instrument16.csv Download Location	
agl35 Scheduler Dusing_the_Instron_Test_System.pdf Downloaded By Administrator	
agl35 Scheduler 🕅 Sample template.xlsx Downloaded On 2021-06-1510:32:36	
agl35 Scheduler 🖹 Sample templateudax	

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:



Dient Name		Task	File Name	Records Duration				
ag189	.*	All		Current Date	T Film	Ø Refresh	Z Export	
Client Name		File Name		Size	0.78222	5		
	Q.		9	File Mode	Created			
agi89		🗐 Ion Chromato	graphy\IC Instrument15.csv	Upload On	2021-03-18 13:19:50			
agi89		🗐 Ion Chromatogr	aphy/JC Instrument14.csv					
ag189		Din Chromatography\JC Instrument13.csv						
agi89		🗐 Ion Chromatography\3C Instrument12.csv						
agi89		🗐 Ion Chromatogr	aphy\IC Instrument11.csv					
agi89		🗐 Ion Chromatogr	aphy/IC Instrument10.csv					
açi89		🗐 Ion Chromatogr	aphy\IC Instrument9.czv					
agi89		🕘 Ion Chromatogr	aphy\IC Instrument8.csv					
agis9		🕘 Ion Chromatogr	aphy\3C Instrument7.csv					

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:

client Name	Task	File Name	Reco	ords Duration				
agl35	* TS3_E:\in2	· · · · · · · · · · · · · · · · · · ·	Las	t 1 Year	*	T Filter	C Refresh	Export
Client Name	Task Status Fil	le Name		Size		0.789062	2	
	Q Q		Q.	Restore Location	1	E:\in2		
agl35	Scheduler 🗄	IC Instrument4-2.csv		Restored By		Administ	rator	
				Restored On		2021-04	-05 12:18:15	



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

lient Name		File Name	Records Duration				
agl35	*		Last 1 Year	*	T Filter	C Refresh	A Export
Client Name	F	ile Name			Size		120.09082
	Q.	Q Q				Delete On 2021-04-12T16:30:5	
agl35	1	E:\speedomtr\sdm.xisx					
agi35	6	E:\samplcopy\sdm.xlsx					
agi35	8	E:\speedomtr\sdms	xisx				
agl35	6	E:\speedomtr\sdms.xl	isx				
agi35	C.	E:\speedomtr\Logilab ELN Installation Guide after changes v 6.6.3					
agl35	6	E:\speedomtr\Logilab ELN User Manual v 6.6.4_as on 20 01 2021					
agl35	6	E:\samplcopy\eln use	r man 6.4.docx				
agl35	f	E:\speedomtr\ein use	r man 6.4.docx				

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 **Scheduler Configuration Log**. The **Scheduler Configuration Log** screen appears as shown in the figure:

Scheduler Config	g. Logs									
Sient Name agl89		Records Duration		T Fiber	C Refresh	Z Export				
Client Name		Task Name	Sour	e Path			Scheduler Status	Man	ual Scheduler Tas	ĸ
	Q.		9.			10.	Task Description	DeA	ctive Scheduler St	tatus
agi89		Scheduler	D:\\	Instrument	s\Refractome	ter	Usemame	Adm	ninistrator	
agi89		Scheduler	D:\J	struments\/	IMR		Task executed on	202	1-01-23 10:48:37	
agl89		Scheduler	D:\1	istruments\/	IMR					
agi89		Scheduler	D:\I	struments\(SC-MS					
agiB9		Scheduler	D:\1	struments\@	SC-MS					
agi89		Scheduler	D:\I	struments\P	olarimeter					
ag189		Scheduler	D:\1	struments\P	olarimeter					
egi89		Scheduler	D:\1	struments\R	lefractometer					
ag189		Scheduler	D:\tr	struments\8	lefractometer					

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 **EXERCISE**, and then click **Preference**. The screen appears as shown in the figure:

E-mail Settings		
Enable E-mail Option	Other Settings Enable Server File Version Delete Policy \$	C Report
Username	Idle Time Out (Minutes)	
Password	Norge File Count	
То	1 Download Link LogOff (Minutes)	
cc	\$ Nutric - Nilocotres should be equal or hers than 60 Liene Order Display	
вос	[OrderID x] [SampleID x] TestCode x]	
SMTP-Server	Sicheduler Rights	0
Port		

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:

Instrument Lock and Tags	Data	My Instruments	Other Instruments	
Client				Template *
AGL91 (AGL91\Suganya)	*			QC
instrument *				Tag Name
IC04 (Instron)				Sample *
Path *				Test *
Dt\Schedule path\Tensile Strengt	. U			
LIMS Order		1		
[44] [21-00013 Sample 01 Deter	mination 1 👻			
File Name *				
Merge File Count 1	Curren	t Upload File Count		
Unlock after Capture				

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 **SSS**, and then click **License Information**. The screen appears as shown in the figure:

Logilab v6.4_20200818_01	Time Zone: Asia/Kolkata (UTC+05:30) Domain: SDMS Site: Agaram Technologies Administrator
License Information	
	Z tapar
License	Value
Q.	
Occupied License	1
Available License	19
Total Licence	20

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 **Workflow Setup**. The screen appears as shown in the figure:

Norkflow Setup	Status	Туре			œ ni
	9.	9	Work	kflow Setup Analysis Completed	
Analysis Completed	Active	Sequence			
leviewed	Active	Sequence	User	Group Name	
verified	Active	Sequence		sking for	
Approved	Active	Sequence		Analyst	
Norkflow History	Active	Sequence		Reviewer	
			0	Testing	
				Chemist	
				Approver	
			0.	Verifier	

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 **W**, **Preferences** and then click **Audit Trail Configuration**. The **Audit Trail Configuration** screen appears as shown in the figure:

			Select All
Module Name	Screen Name	Task Name	Manual Audit trail
	9	Q	9.
Base Master	Domain	Add	~
		Edit	~
	Client	Edit	~
	Site	Edit	× ×
	Instrument	Edit	~
		Retire	~
Tags and Templates	Tag Master	Edit	~
	Tag Value Master	Edit	~
FTP	Server Configuration	Edit	5 5 5 5 5
	Server Drive Configuration	Edit	~
	FTP Configuration	Edit	ž 🔿
	FTP Rights	Mapping	~

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

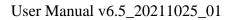
• Enables the Empower Scheduler item under scheduler menu.

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