



# StrataSync 16.5

## User Guide



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## Notice

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# About this Guide

Thank you for using StrataSync™. This prefix explains how to use this manual to get you up and running with the software as soon as possible.

## Purpose and scope

The purpose of this guide is to help you successfully use StrataSync features and capabilities. This guide includes task-based instructions that describe how to install, configure, use, and troubleshoot the StrataSync System. Additionally, this guide provides a complete description of the VIAVI warranty and services, including terms and conditions of the licensing agreement.

## Assumptions

This guide is intended for novice, intermediate, and experienced users who want to use the StrataSync System effectively and efficiently. We are assuming that you have basic computer experience and are familiar with basic telecommunication concepts and terminology.

## Technical assistance

If you require technical assistance, call 1-844-GO-VIAVI / 1.844.468.4284.

Outside US: +1-855-275-5378

Email: [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com)

For the latest TAC information, visit

<https://support.viavisolutions.com>

<https://www.viavisolutions.com/en/services-and-support/support/technical-assistance>



# Introduction

This chapter provides an overview of the StrataSync System and its key features, including the following:

- "About the StrataSync System" on page 14

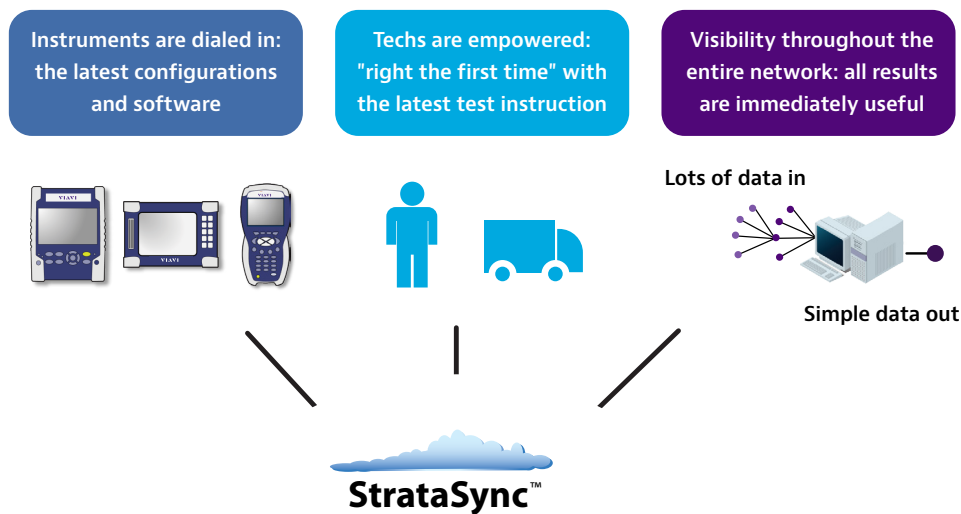
## About the StrataSync System

StrataSync is a hosted, cloud-based software application that provides asset, configuration, workflow, and test data management for a wide range of VIAVI Solutions instruments.

StrataSync manages inventory, test results, and performance data anywhere with browser-based ease and improves technician and instrument efficiency.

### StrataSync features

- **Updates and Options** – Field personnel operate at maximum capability and efficiency by knowing immediately when firmware upgrades and instrument options are available. They receive proactive, application-aware notifications, and distribution is managed for specific groups or individuals.
- **Asset and Configuration Management** – Enterprise-wide standardized templates to ensure instruments are aligned to a specific configuration. StrataSync lets users monitor and update asset data, modules, configurations, test plans and scripts, templates, and groups, ensuring technicians consistently have the right instrument configurations when performing tests—increasing first-time success rates and reducing repeat rates.
- **Test Data Management** – A common test data repository makes baselining performance practical, and enables the analysis of network trends for proactive maintenance, improved reliability, and customer satisfaction. StrataSync performs file storage, printing, and exporting, and provides clear dashboards and basic reports.
- **Workflow** – Automatically track whether assigned jobs are being completed and their pass/fail status. Results can be viewed per technician, per region, per subcontractor, or however you like.



All without increasing headcount, while also minimizing overall operating cost and unnecessary truck rolls.

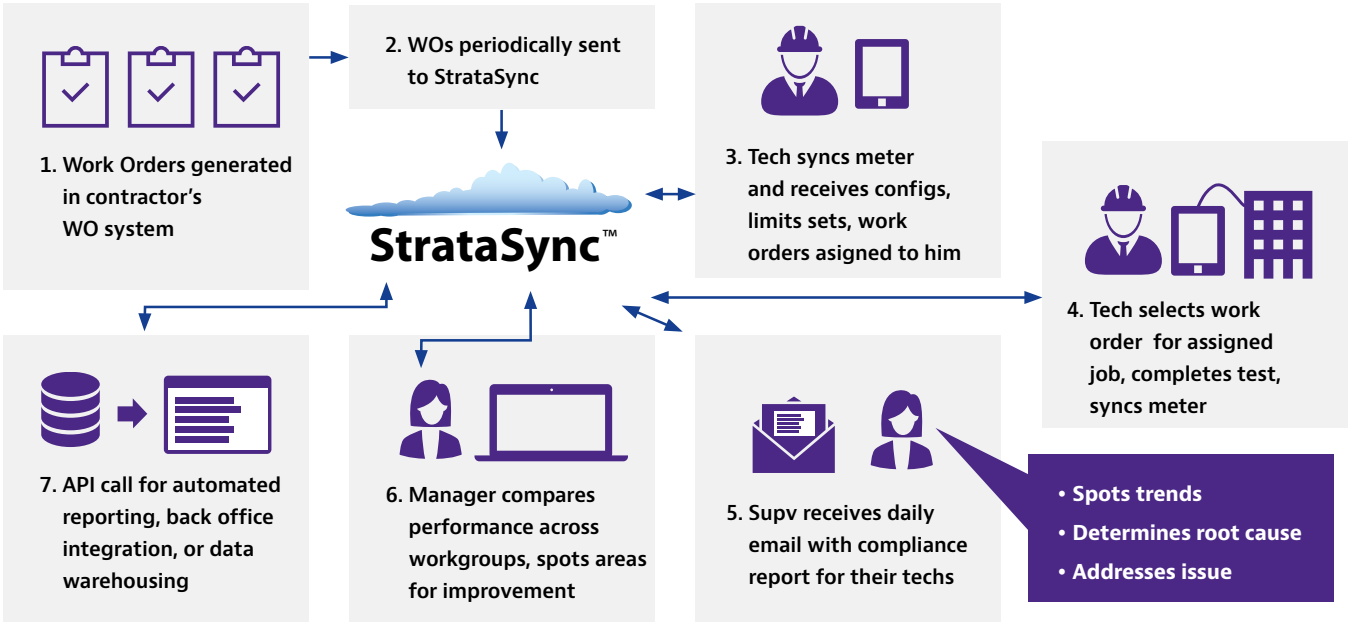
## Asset management

StrataSync asset management provides a single, intuitive way to monitor and upgrade assets in the field and office. An administrator can quickly identify out-of-date and under-utilized test sets and target updates and the reallocation of assets. With StrataSync, registration identifies which test units are assigned to each technician. StrataSync tracks each test-set sync with the server, making utilization and test practices visible. Post-analysis of compliance and technician activity provides near real-time coaching opportunities.

Upgrades can be applied automatically during the normal work order process, as technicians use their test sets in the field. This dramatically reduces the amount of time spent in the work center determining the fit-for-purpose status of the test set, identifying upgrade requirements, and then manually upgrading the test set.

## Test data management

StrataSync collects and stores test data in a central location, enabling viewing and sharing of test data results. Often, data is not centrally collected and its long-term value is underrated. The causes of repeat truck rolls are obscure, and data from previous tests is not available or is not analyzed. With StrataSync, critical plant-performance information is stored in a secure location, enabling proactive problem-area identification. Test data is also accessible via an API to simplify automated retrieval.







# Getting Started

This chapter provides steps to get started using StrataSync, including the following:

- "Logging into StrataSync" on page 18
- "Updating your user profile" on page 19
- "Setting up StrataSync" on page 20
- "StrataSync visual overview" on page 21
- "Connecting to StrataSync from the VIAVI Mobile Tech App" on page 23

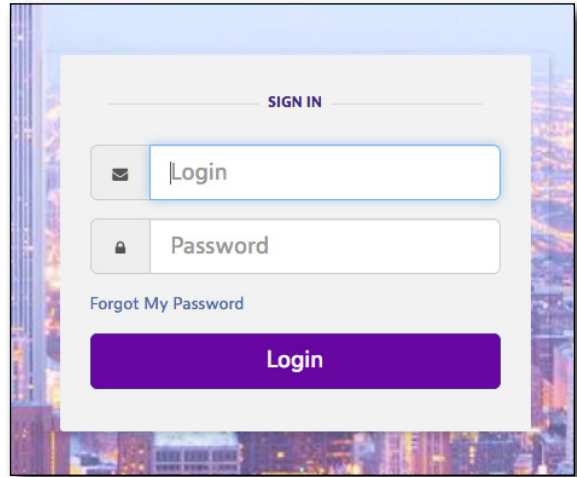
# Logging into StrataSync

Welcome to StrataSync! To bring up the StrataSync login screen from your browser, type the IP address or host name for your server and press return.

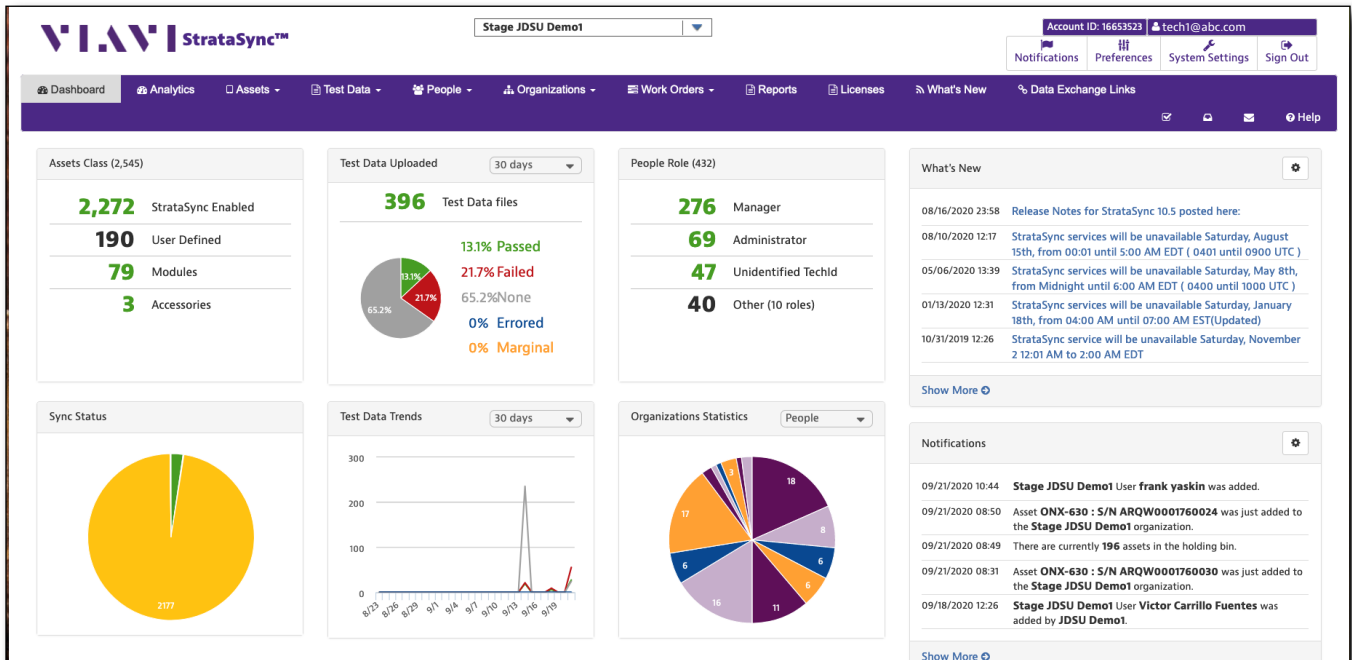
Your StrataSync Administrator may have already created a browser bookmark and user profile for you.

If you are the administrator, you should have received your login and licensing information from VIAVI when your account was set up.

Enter your Username and Password, then select the **Log In** button. The StrataSync **Main Dashboard** will be displayed.




**Note:** If you need help logging in, contact your StrataSync Administrator.

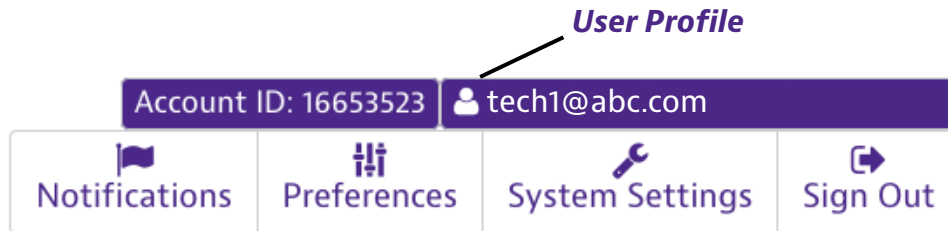


StrataSync Main Dashboard

## Updating your user profile

Your StrataSync Administrator should have already created a profile for you. To update your user information, click **User Profile**  next to your name in the Main toolbar at the top right of the screen.

If you didn't receive login info, contact your StrataSync Administrator.



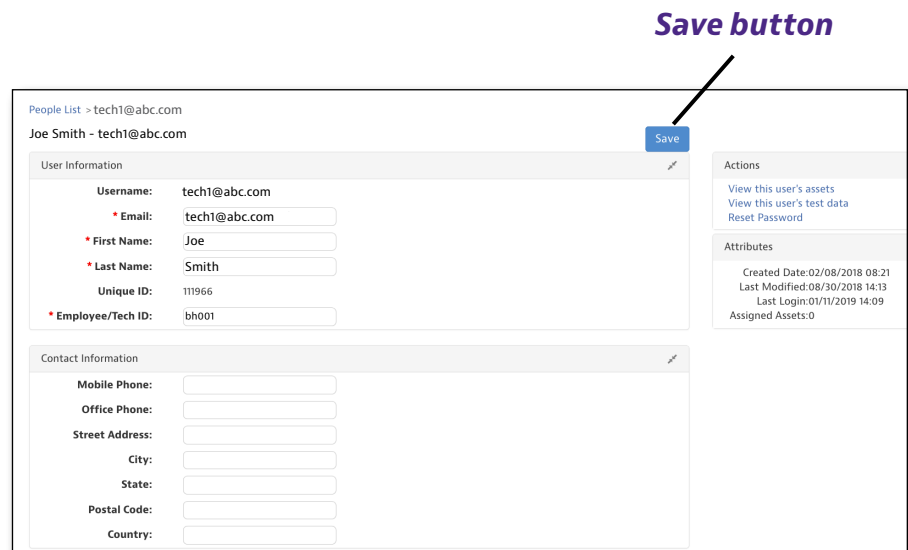
User Profile in the Main toolbar

### User profile

The **User Profile** screen allows you to update your name, email address, tech ID, and contact info.

You can even view your assets and test data from here.

Edit the information as necessary. When done, click **Save** to confirm.



The image shows the "User Profile" screen for "Joe Smith - tech1@abc.com". The page has a breadcrumb "People List > tech1@abc.com". The main content area is divided into two sections: "User Information" and "Contact Information".

**User Information:**

- Username: tech1@abc.com
- \* Email: tech1@abc.com
- \* First Name: Joe
- \* Last Name: Smith
- Unique ID: 111966
- \* Employee/Tech ID: bh001

**Contact Information:**

- Mobile Phone:
- Office Phone:
- Street Address:
- City:
- State:
- Postal Code:
- Country:

On the right side, there are "Actions" and "Attributes" sections. The "Actions" section includes "View this user's assets", "View this user's test data", and "Reset Password". The "Attributes" section shows "Created Date: 02/08/2018 08:21", "Last Modified: 08/30/2018 14:13", "Last Login: 01/11/2019 14:09", and "Assigned Assets: 0". A blue "Save" button is located at the top right of the form, with an arrow labeled "Save button" pointing to it.

## Reset password

Click **Reset Password** in the **Actions** panel on the right to update your password.

## Reset Password

The screenshot shows a user profile for 'Joe Smith - tech1@abc.com'. The 'User Information' section includes fields for Username (tech1@abc.com), Email (tech1@abc.com), First Name (Joe), Last Name (Smith), Unique ID (111966), and Employee/Tech ID (bh001). The 'Contact Information' section includes fields for Mobile Phone, Office Phone, Street Address, City, State, Postal Code, and Country. The 'Actions' panel on the right contains buttons for 'View this user's assets', 'View this user's test data', and 'Reset Password'. The 'Attributes' section shows 'Created Date: 02/08/2018 08:21', 'Last Modified: 08/30/2018 14:13', 'Last Login: 01/11/2019 14:09', and 'Assigned Assets: 0'. A red arrow points to the 'Reset Password' button in the Actions panel.

From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.

When you log in, enter the temporary password, then the new one. Enter it again to confirm.

When done, click **Save** to confirm.

You can also change your password through Preferences. See ["Configuration" on page 227](#)

If you need help changing your password, contact your StrataSync Administrator.

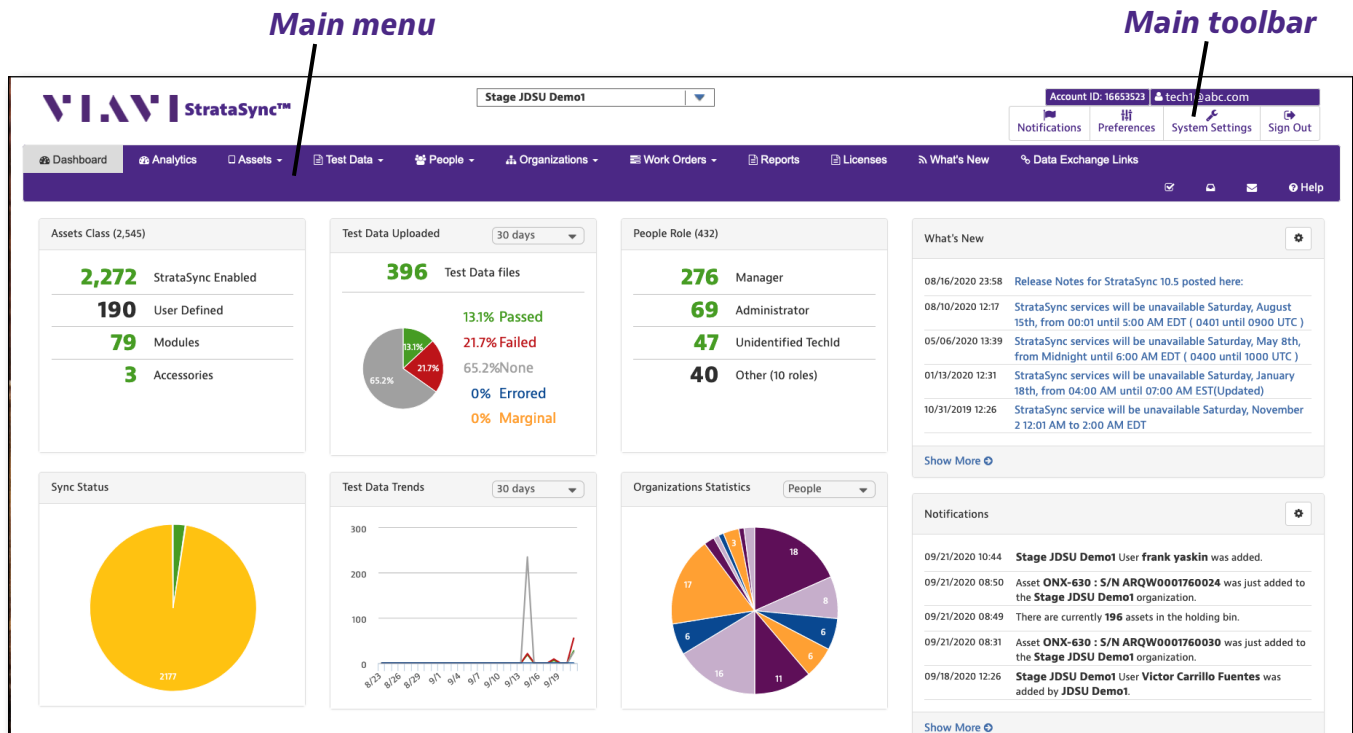
The 'RESET PASSWORD' dialog box contains the following text: 'RESET PASSWORD', 'Select a method and press next button to proceed', and two radio button options: 'Send password to user directly' (which is selected) and 'Show me password'. At the bottom, there are 'Done' and 'Cancel' buttons.

The 'Temporary Password' dialog box displays the following information: 'Temporary Password', 'Username: abc@jdsu.com', and 'Temporary Password: ^%d#4gM2'. At the bottom, there is a 'Done' button.

## Setting up StrataSync

For more detailed information on configuring and managing the system for administrators, see ["Configuration" on page 227](#).

# StrataSync visual overview



StrataSync Main Dashboard

## Navigation

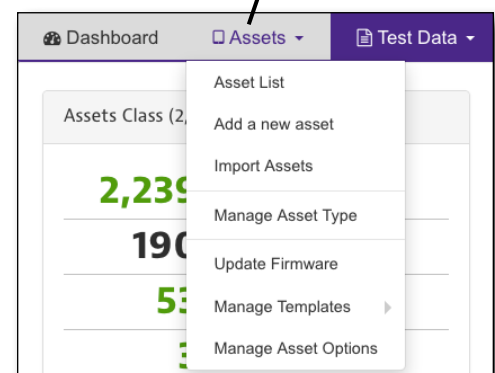
Most of the navigation in the StrataSync System is done through the **Main menu tabs** (purple menu at the top of the screen) and the **Main toolbar** (menu at the top right corner of the screen), as shown above.

## Main menu

Select the tabs within the Main menu to open dropdown menus to navigate between the **Main Dashboard** (home page), **Analytics**, **Assets**, **Test Data**, **People**, **Organizations**, **Work Orders**, **Reports**, **Licenses**, **What's New**, and **Data Exchange Links** screens.

You can also select the icons for **Manage Firmware Versions** , **Holding Bin** , **Schedule Email** , and bring up the **Help**  **Help** section on the far right.

## Assets tab and dropdown menu



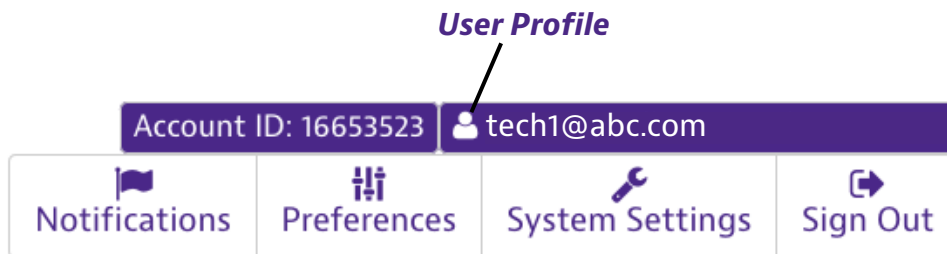


**NOTE:**


**The tabs in the Main menu are dependent on the options available for your StrataSync account. See your VIAVI sales representative for more information.**


## Main toolbar


Along the top right side of the screen are several menu items, as shown below.




**Account ID** – Shows the enterprise account ID.

**User Profile**  – Shows the current user’s profile information, where you can edit the name, email address, tech ID, and contact info.

**Notifications**  – Allows you to send a message to your StrataSync administrator.

**Preferences**  – Allows you to configure your user preferences, including general appearance, language, security, notifications, measurement units, and dashboard settings. See *"Configuration" on page 227*.

**System Settings**  – Allows StrataSync administrators to configure the overall system, including security, asset management, organization, firmware management, and configuration template settings. See *"Configuration" on page 227*.

**Sign Out**  – Signs out the current user.

## Connecting to StrataSync from the VIAVI Mobile Tech App

You can connect to StrataSync using your smartphone or tablet anytime, anywhere using the VIAVI Mobile Tech app.

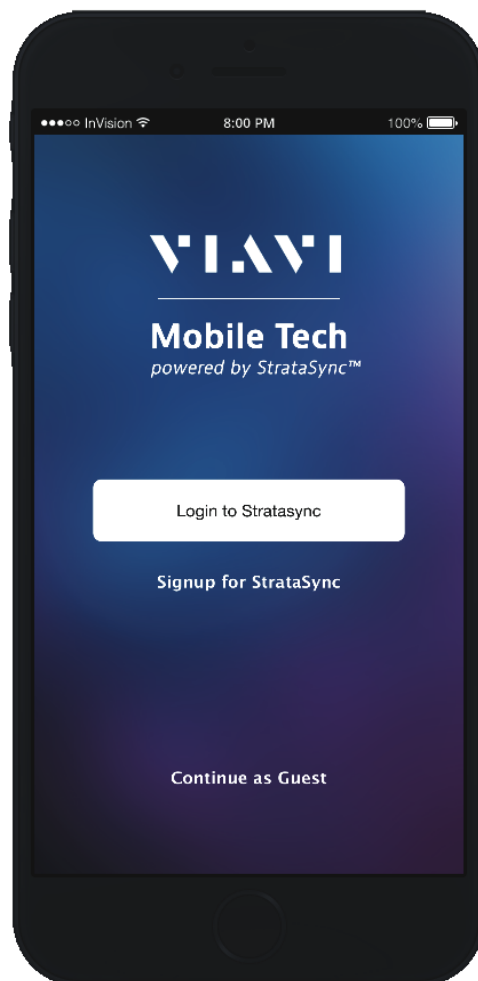
Mobile Tech supports sync and file management between a wide variety of VIAVI test instruments and StrataSync using an iOS or Android mobile device. The application is available on the App Store and Google Play. See the store app descriptions for a full list of supported devices.

Once your instrument is connected to the Mobile Tech app via Bluetooth, geo location information can be added to reports and files when syncing to StrataSync. If configuration files are set to be deployed from StrataSync to your meter, you can check those here, as well as browsing files from the unit itself.

Once you download the application, log in to StrataSync just as you do on the website. To operate the tests, follow the instructions on the application screens. See the user's guide for your instrument for details on setup and connecting to StrataSync.



Mobile Tech



## Instrument-based login for Mobile Tech

Prior to Mobile Tech release 4.2 (and StrataSync release 11.5), a user could either use the VIAVI Mobile Tech application (on either an Apple iOS or Android tablet/phone) in 'Guest' mode (where it acts as a companion app to a VIAVI test instrument for the purposes of sharing files with the instrument and other endpoints, e.g. emailing test results), or a user could use Mobile Tech while logged-in to StrataSync, which additionally supports synchronizing files with a customer's StrataSync account (e.g. workorders, test results, configuration files) and may even support firmware updates. To login to StrataSync with Mobile Tech, a user would need their unique username and password combination, as if they were logging in via the web browser UI.

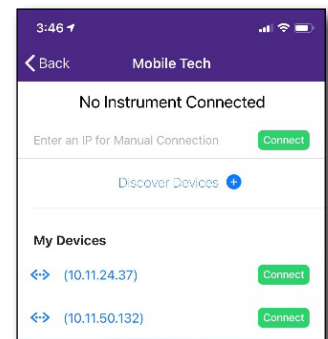
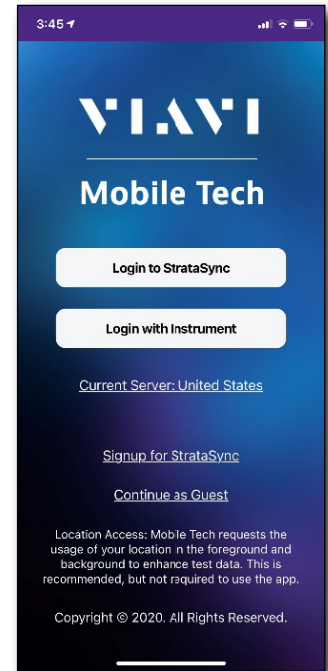
From Mobile Tech release 4.2 and StrataSync release 11.5 onwards, for compatible instruments (currently NSC-100 and Optimeter), a Mobile Tech user (typically a technician) can login to StrataSync using the connectivity details already provisioned into their VIAVI instrument:

- StrataSync server (US or EU production)
- StrataSync account ID
- StrataSync tech ID

When opening the Mobile Tech app, technicians should choose the "Login with Instrument" option, and then connect to the instrument discovered by the Mobile Tech app.

There are several pre-requisites for this functionality:

- You must have Mobile Tech version 4.2 or later installed on your Apple iOS or Android device.
- The instrument in question may require a firmware upgrade prior to supporting this capability with Mobile Tech and StrataSync – please review the release notes for your instrument to see if it supports this capability, and from which firmware release this was supported.
- The Unique Id of the instrument must be present in the StrataSync customer account. This can be achieved in any one of the following ways:
  - The instrument has been 'Factory-Synced' with/without a techId.
  - The instrument must have synced at least once to the Customer account using the instrument's direct sync method.
  - The instrument details have been added manually using the 'Asset Import' functionality in StrataSync.
  - The instrument details have been added manually using the Assets tab 'Add a new asset' function in StrataSync.
- The user's Tech ID must be present in the StrataSync customer account (it is not required that the instrument is currently associated with this Tech ID).



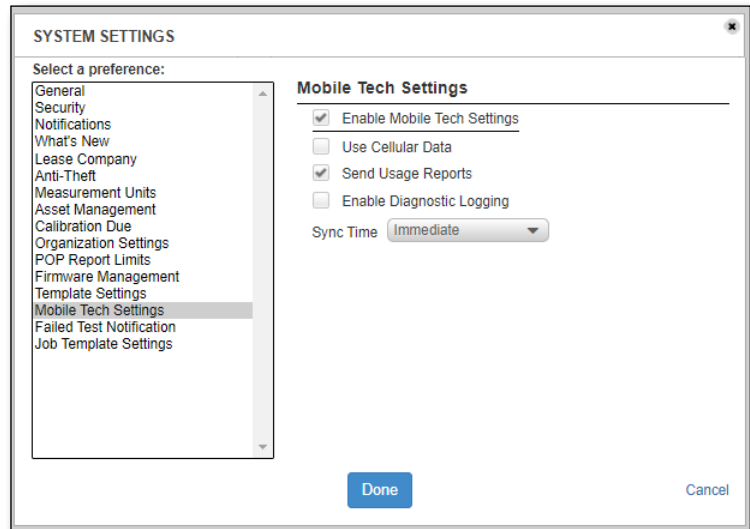


## Mobile Tech centralized settings

To help with the consistent configuration of the VIAVI Mobile Tech app across a large fleet of technicians, StrataSync has added centralized Mobile Tech settings for accounts configured for this capability.

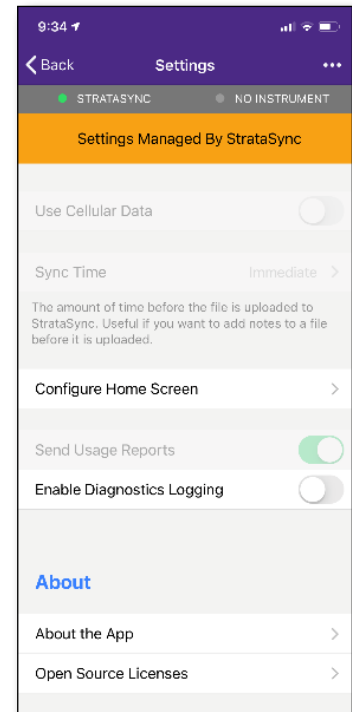
These are configured from the System Settings menu and are applicable for all Mobile Tech users associated with the StrataSync account.

For more information, see *"Mobile Tech settings"* on page 239.



When the **Enable Mobile Tech Settings** checkbox is enabled, any user logging into the Mobile Tech app will see the common settings grayed-out and a yellow banner stating "Settings Managed By StrataSync".

**Note:** This feature requires a StrataSync subscription plan – please contact your VIAVI sales representative to ask about StrataSync licensing if you do not currently have this feature.



### NOTE:

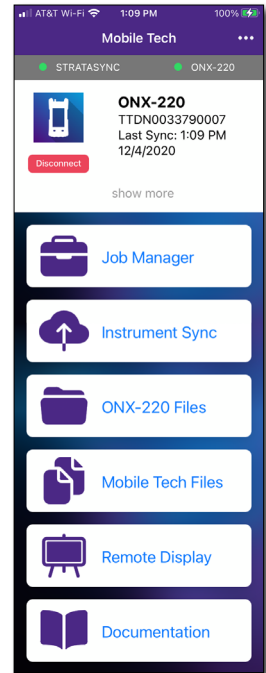
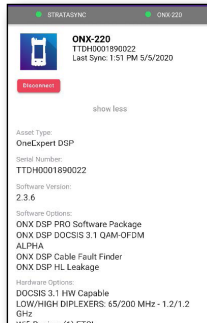


**You must select the "Login Enabled" checkbox in the user profile under Access and Visibility for this feature to work. See "Editing user details" on page 146.**

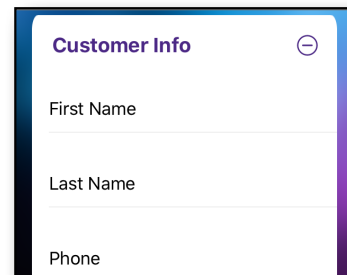
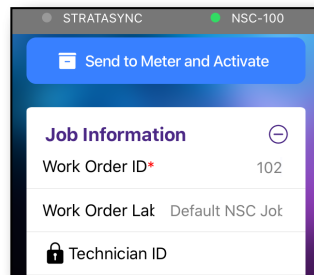
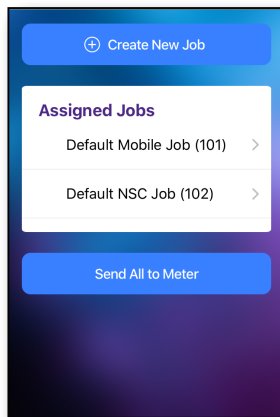
## Mobile Tech Main menu

Once you log into StrataSync, you will see the Main menu. Here you can see details of the instrument, sync to StrataSync, manage files on the unit, view documentation, and even contact product support for more information or to request a repair or calibration.

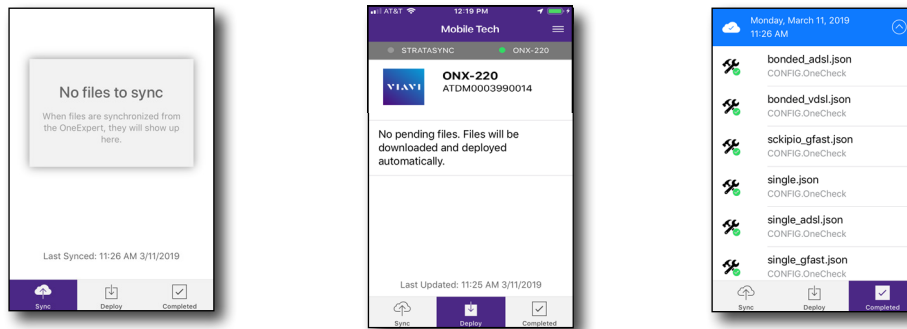
Near the top of the Main menu, you can click **Show more** to see details on your instrument, including all of the installed options.



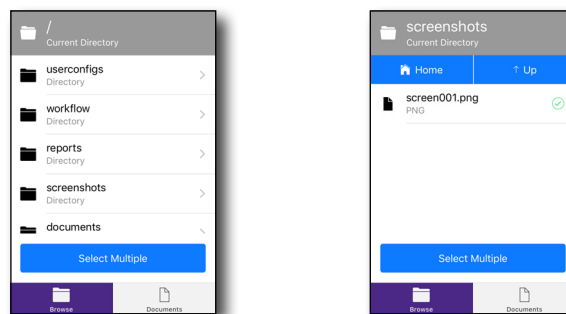
- **Job Manager** – Attach jobs to tests, including customer info and work orders, and track test results



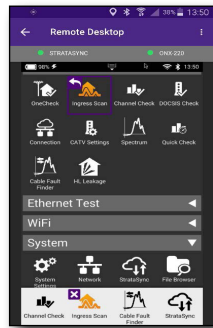
- **Instrument sync** – Sync your instrument to StrataSync and deploy configuration files



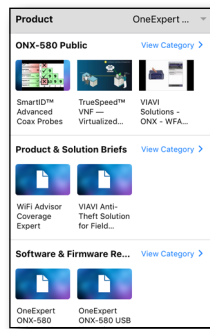
- **File management** – Manage files on the unit that you can save to your phone or tablet. Use the **Instrument Files** menu to manage files stored on your meter (e.g. ONX-220), use the **Mobile Tech Files** menu to manage those stored on your mobile device.



- **Remote Display** – Connect directly to the OneExpert remotely to configure your unit and run tests



- **Documentation** – View and download various documentation for your instrument, including applications notes, software release notes, and quick reference guides



# StrataSync Basics

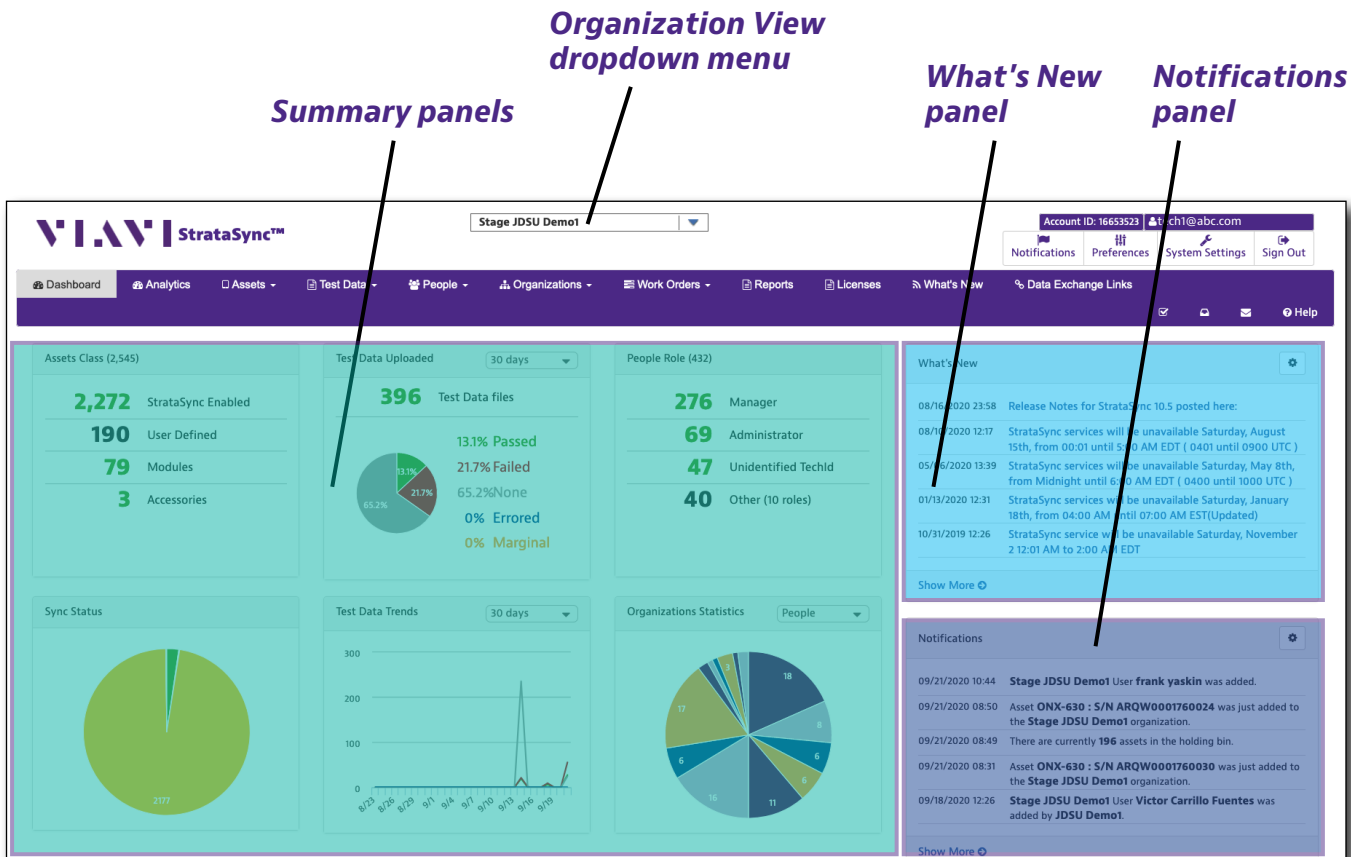
This chapter covers how to use the StrataSync System, including the following:

- "Main Dashboard" on page 30
- "What's New panel" on page 38
- "Notifications panel" on page 39
- "Managing firmware versions" on page 40
- "Holding Bin" on page 42
- "Scheduling emails" on page 45
- "Help" on page 48

# Main Dashboard

The **StrataSync Main Dashboard** is the default view that appears after initial login, as shown below. This view provides the overall system status through several configurable summary panels, notifications, and what's new areas.

It also appears after selecting  **Dashboard** from the **Dashboard panel**.



StrataSync Main Dashboard

**NOTE:**



**Your company StrataSync account is shared with other users in your enterprise. Some of the activities and configurations may already be in place.**

**Check with your StrataSync Administrator and be prepared to coordinate information with other users in your enterprise.**

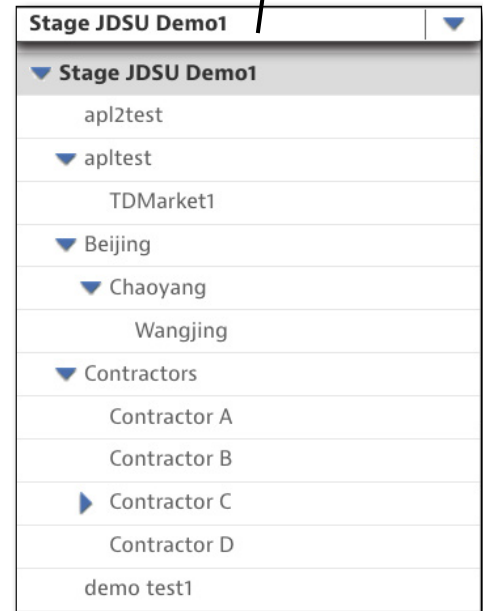
## Changing the Organization View

You can change what Organization or suborganization view is shown on the dashboard for your StrataSync account from the **Organization View** dropdown at the top of the Main Dashboard.

From here, you can click the arrows to drill down further, including other areas of your organization.

Select the dashboard you want to change to.

*Organization View dropdown menu*



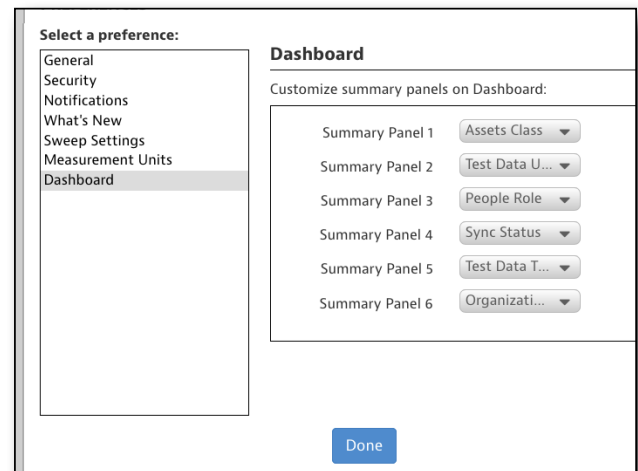
## Customizing your summary panels

You can choose what summary panels appear on the Main Dashboard.

Select **Preferences** from the Main toolbar and then **Dashboard**. Use the dropdowns to choose from among 13 available panels.

These preferences can be customized for each user.

See "[Configuration](#)" on page 227.



## Assets Class panel

This panel provides the overall asset counts for the following types: **StrataSync Enabled, User Defined, Modules, and Accessories.**

Select an asset count to show the details for each category in the Assets List.

It is updated in real time. Refresh your browser to get the most recent view.

Assets Class (2,485)	
<b>2,239</b>	StrataSync Enabled
<b>190</b>	User Defined
<b>53</b>	Modules
<b>3</b>	Accessories

## Assets Status panel

This panel provides the overall asset counts by status for the following: **Active, Calibration, Repair, Loaned, and Others.**

Select an asset status to show the details for each category in the Assets List.

It is updated in real time. Refresh your browser to get the most recent view.

Asset Status	
<b>2290</b>	Active
<b>0</b>	Calibration
<b>1</b>	Repair
<b>0</b>	Loaned
<b>2</b>	Others

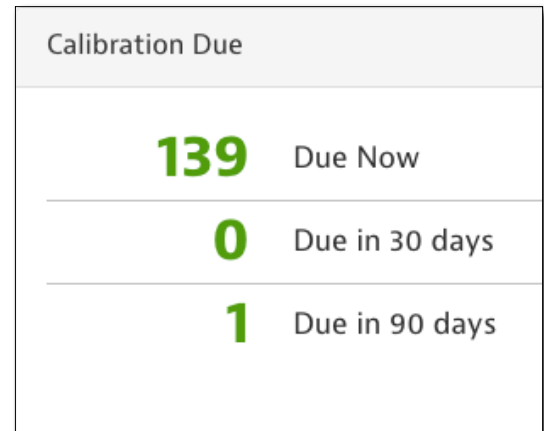


## Calibration Due panel

This panel provides calibration status of the "sync-able" assets for the following categories: **Due Now**, **Due in 30 days**, and **Due in 90 days**.

Select a deadline to show the details for each category in the Assets List.

It is updated in real time. Refresh your browser to get the most recent view.



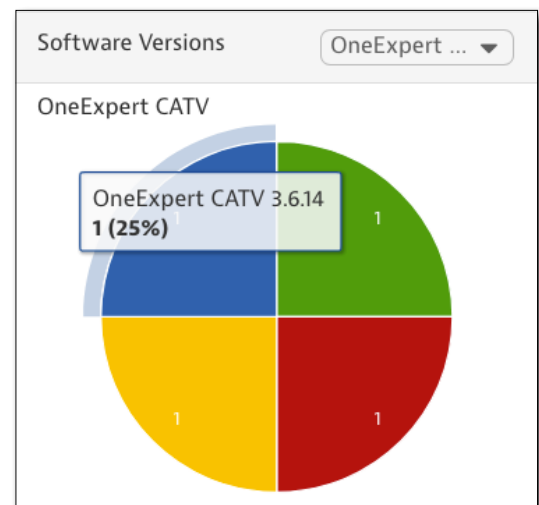
## Software Versions panel

This panel provides the software release information for the selected asset type. The asset type can be selected from the dropdown.

Hover your mouse over a version to show a popup with more detail, including the version and percentage installed.

Select an area of the graph to show the details for each category in the Assets List.

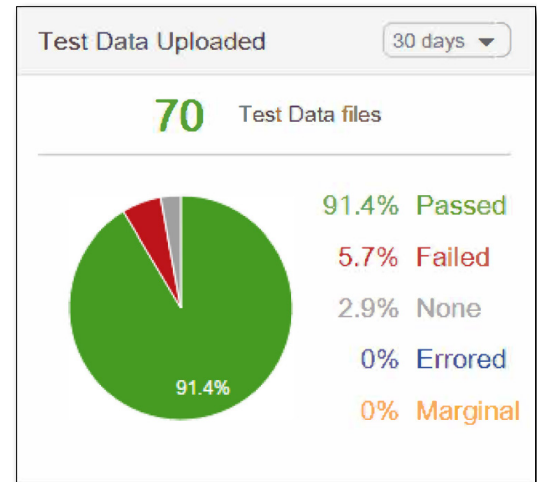
It is updated in real time. Refresh your browser to get the most recent view.



## Test Data Uploaded panel

This panel provides the overall test result percentages for the selected duration, including the following categories.

- **Passed** – Tests ran with Passed completion status
- **Failed** – Tests ran with Failed completion status
- **None** – Tests ran without a pass fail threshold
- **Errored** – An error occurred during the test and the results may be invalid
- **Marginal** – Tests ran with Marginal completion status



Use the dropdown to select the duration: **7**, **14**, or **30** days.

Select a percentage to show the details for each category in the Test Data List.

It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).



### NOTE:

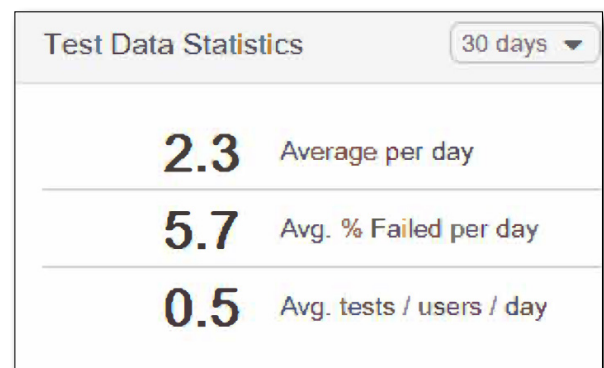
*Times shown in StrataSync correspond to your local time zone, no matter where the device was synced from. Upload times are listed, not when tests were run.*

## Test Statistics panel

This panel provides the statistics of the tests completed by technicians for the selected period, including: **Average per Day**, **Average % Failed per day**, and **Average tests / users / day**.

Use the dropdown to select the duration: **7**, **14**, or **30** days.

It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).



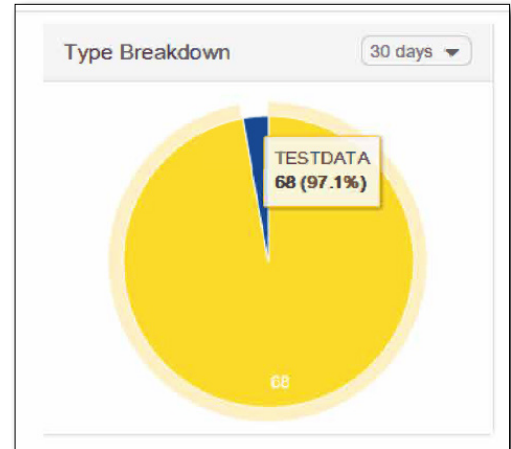
## Test Type Breakdown panel

This panel provides the statistics of the type of tests completed by technicians for the selected period.

Use the dropdown to select the duration: **7**, **14**, or **30** days.

Select a percentage to show the details for each category in the Test Data List.

It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).



## People Role panel

This panel provides the overall user counts for the defined roles in the system.

Select a role to show the details for each category in the People List.

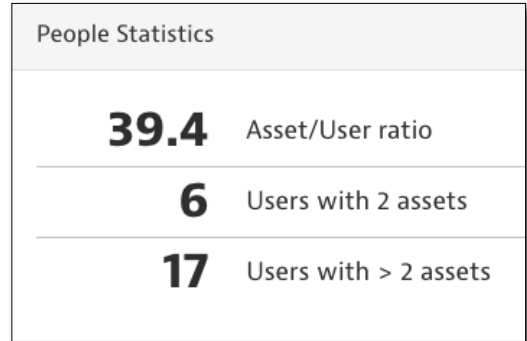
It is updated in real time. Refresh your browser to get the most recent view.

People Role (418)	
<b>276</b>	Manager
<b>58</b>	Administrator
<b>45</b>	Unidentified TechId
<b>39</b>	Other (10 roles)

### People Statistics panel

This panel provides information about the assets to users ratio and the number of assets per user in the system.

It is updated in real time. Refresh your browser to get the most recent view.



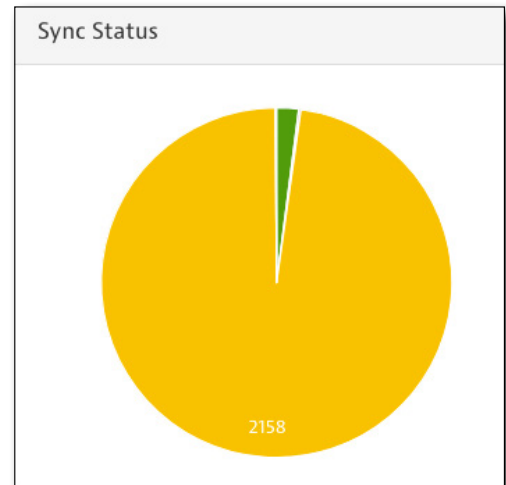
### Sync Status panel

This panel provides the overall asset sync status counts, including the following categories:

- **OK** – Assets were successfully synchronized with StrataSync
- **Failed** – Assets were not able to synchronize with StrataSync
- **Upgrade Needed** – A software update is available for the assets
- **Sync Needed** – Updates, such as pending template deployments, are available for the assets.

Select a percentage to show the details for each category in the Asset List.

It is updated in real time. Refresh your browser to get the most recent view.

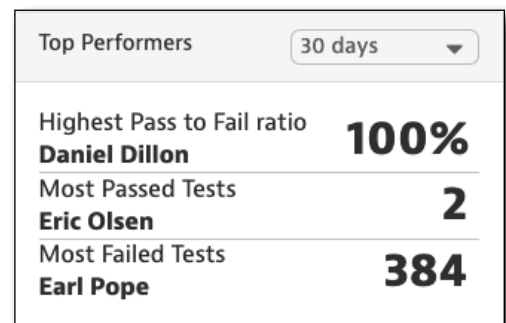


### Top Performers panel

This panel provides the pass and fail statistics completed by technicians for the selected period, including: **Highest Pass to Fail Ratio**, **Most Passed Tests**, and **Most Failed Tests**.

Use the dropdown to select the duration: **7**, **14**, or **30** days.

It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).



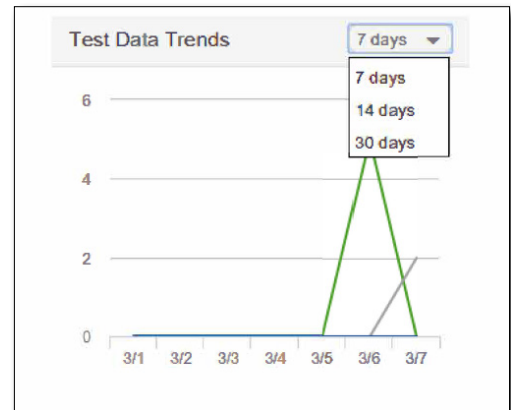
## Test Data Trends panel

This panel provides a graphical view of the test results trends, including the following categories: **Passed**, **Failed**, **No status**, and **Errored** for the selected period.

Use the dropdown to select the duration: **7**, **14**, or **30** days.

Select a line on the graph to show the details for each category in the Test Data List.

It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).



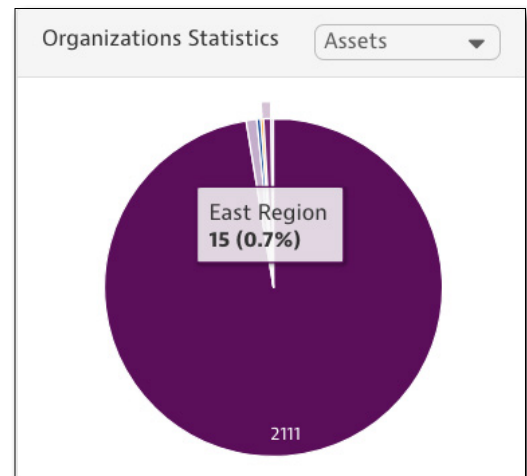
## Organizations Statistics panel

This panel provides the overall asset and people counts that are assigned to the selected organization.

Use the dropdown to select **Assets** or **People**.

Hover your mouse over an area of the graph to show a popup with more detail.

It is updated in real time. Refresh your browser to get the most recent view.




## What's New panel

This panel provides application events and announcements per your preference settings.

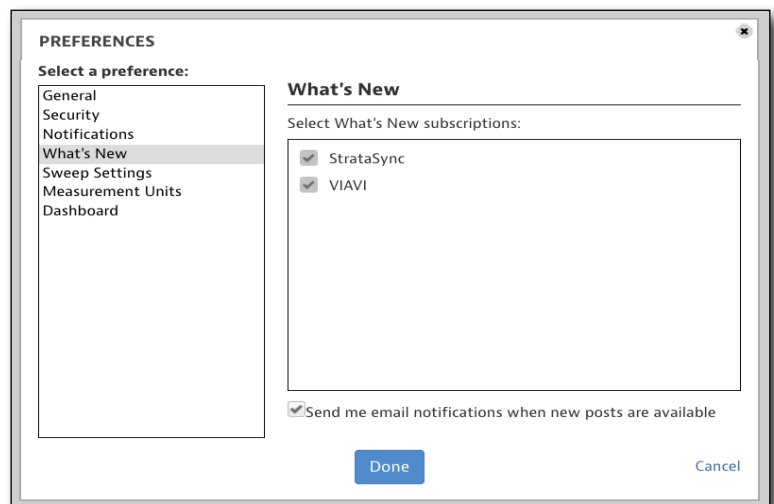
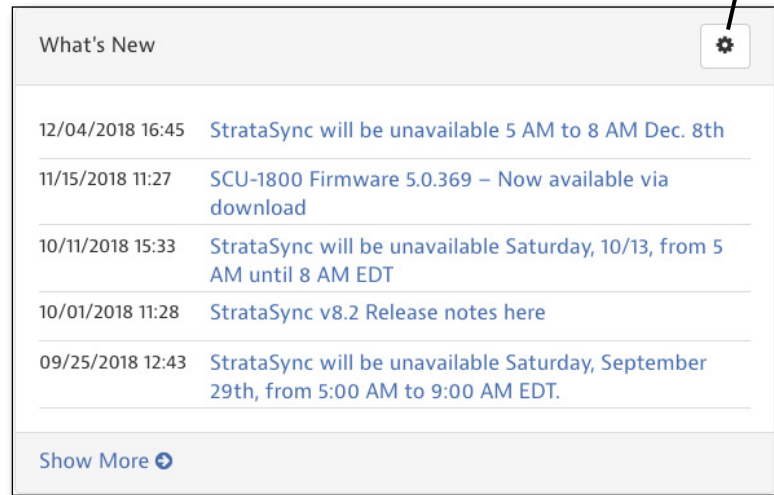
The available types of what's new categories are set up by your StrataSync Administrator.

Select **Show More** to bring up the full view with filtering capability for the type of events.

To change your subscriptions for this panel, select the gear button  to bring up the **Preferences** screen, then select **What's New**.

You can also subscribe to email notifications for new posts by selecting the checkbox at the bottom of the screen.

*Gear button*




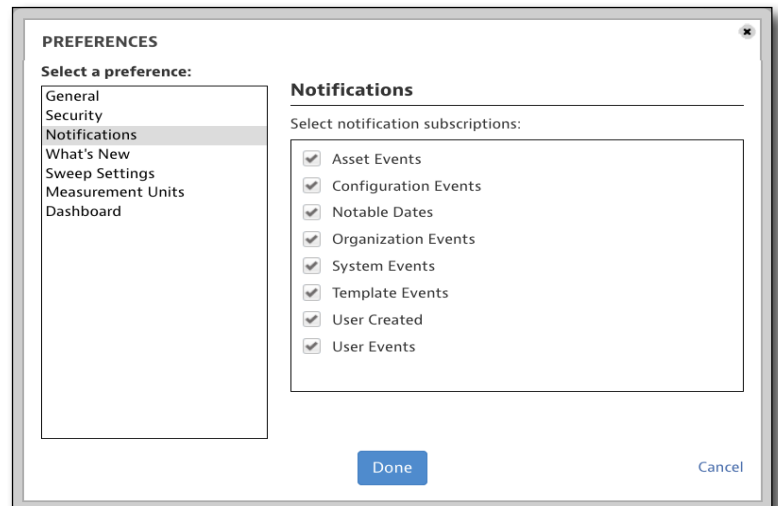
## Notifications panel

This panel provides application events and user messages per your preference settings.

The available types of notifications are set up by your StrataSync Administrator.

Select **Show More** to bring up the full view with filtering capability for the type of events.


To change your subscriptions for this panel, select the gear button  to bring up the **Preferences** screen, then select **Notifications**.



## Managing firmware versions

If you have been set up to manage firmware versions for your assets, you can manage them right from the Main toolbar. This must be enabled in System Settings. See "[Firmware management](#)" on page 237.

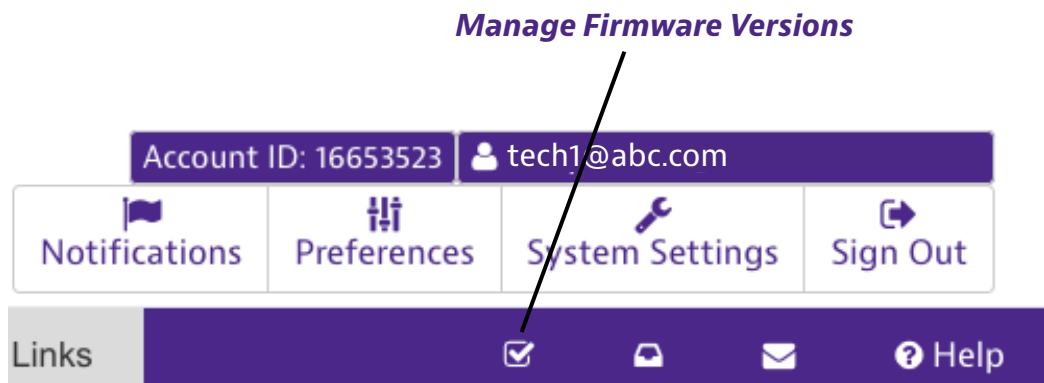
Firmware management allows you to limit the enterprise/account visibility of new firmware releases that are generally available from StrataSync. This design allows for testing and approval of the firmware before it is deployed to the entire field.

1. Select **Manage Firmware Versions**  from the Main toolbar.
2. From the Manage Firmware Versions screen, select the asset type from the dropdown, and then use the **Approval Status** dropdowns to change the status for each version of firmware you want to update. Use the arrow buttons at the bottom if there are multiple versions.

There are three options for approval status: **To Be Tested**, **APPROVED**, and **In Test**.

- Firmware versions with the **To Be Tested** status cannot be deployed to instruments in StrataSync.
- Firmware versions with the **APPROVED** status can be deployed to instruments by StrataSync users with a role that has the **Update Firmware** permission granted.
- Firmware versions with the **In Test** status can be deployed to instruments by StrataSync users with a role that has the **Firmware Tester** permission granted.

After selecting the desired approval status, select **Save** to change the approval status.























**Asset Type**

**Approval Status**

Manage Firmware Versions

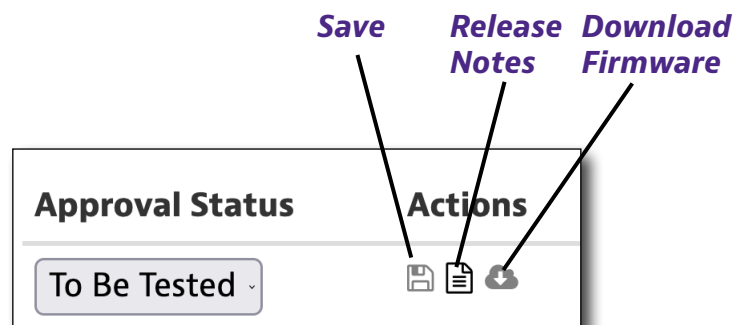
Asset Type: OneExpert CATV

Approval Status	Actions	Package Name	Version	Release Date	Status
APPROVED	  	4.0.11	4.0.11	2020/04/21	Beta
In Test	  	3.21.448	3.21.448	2020/04/23	Beta
To Be Tested	  	4.0.13	4.0.13	2020/05/12	Beta
To Be Tested	  	4.0.15	4.0.15	2020/05/19	Beta
APPROVED	  	4.0.18	4.0.18	2020/06/22	Beta
To Be Tested	  	3.21.521	3.21.521	2020/06/22	Beta

## Actions

From the Manage Firmware Versions screen, you can save the approval status, download release notes, and download the firmware itself.

In the Actions column, select **Save**, **Release Notes**, or **Download Firmware**.



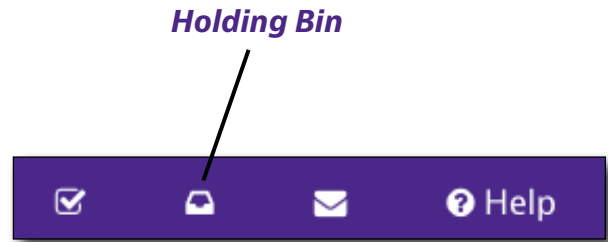
## Holding Bin

The **Holding Bin** provides a list of assets that have been synchronized to StrataSync for the first time at the factory.

When a new asset is synced and added to the system, it is placed in the holding bin until it is assigned to a user.

If you have permissions, assets can be moved from the holding bin and made active by assigning them to users.

Select **Holding Bin**  from the Main toolbar.



The screenshot shows the 'Holding Bin' page in the StrataSync application. It features a table with columns for Asset Type, Model, Serial No, Unique ID, Mac Address, Last Sync Date, Tech ID, Tech First Name, Tech Last Name, and Tech Organization Name. The table contains 18 rows of asset data.

Asset Type	Model	Serial No	Unique ID	Mac Address	Last Sync Date	Tech ID	Tech First Name	Tech Last Name	Tech Organization Name
OneExpert DSL	ONX-580	RRPS0040940021	RRPS1140940021	00:80:16:97:00:86		99887766			
OneExpert DSL	ONX-580	ARQA000055001	ARQA110055001	00:07:11:11:7C:84		99225577			
HST-3000	HST3000c-ACE2	ARHP5030476545	2BAF400100001	00:80:16:46:99:9C		88886665			
HST-3000	HST3000c-ACE1	ARHP5030476545	8961780000001	00:40:4D:13:B4:3C		5555886			
HST-3000	HST3000c-ACE2 (128M)	78CD6D000000	78CD6D000000	0E:00:00:EA:18:F0		techimp003			
OneExpert DSL	ONX-580	RRPS0042244365	RRPS0042244365	00:80:16:97:3A:2B	10/27/2016 17:47	hsttest			
DSAM	DSAM-6300	1337000	1337000	00:07:11:09:09:37	01/24/2017 10:45	stevet			
OneExpert DSL	ONX-580	RRPS0040940010	RRPS0040940010	00:80:16:97:00:72	11/03/2017 15:49	3384667			
CLI/Leakage Equip (All)	Trilithic Seeker Light	411408	411408			1525542			
CLI/Leakage Equip (All)	Trilithic Seeker	68557	68557			1516220			
CLI/Leakage Equip (All)	Trilithic Seeker	62288	62288			1517531			
CLI/Leakage Equip (All)	Trilithic Seeker	68739	68739			1513403			
CLI/Leakage Equip (All)	Trilithic Seeker	69655	69655			1515786			
CLI/Leakage Equip (All)	Trilithic Seeker	68174	68174			1520880			
CLI/Leakage Equip (All)	Trilithic Seeker	69557	69557			1521621			

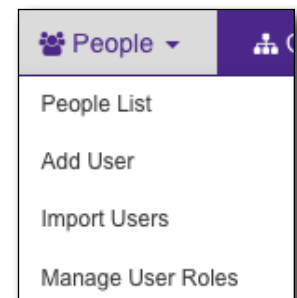
StrataSync Holding Bin in the Assets List

## Moving assets from the Holding Bin

In order to move an asset from the holding bin to the organization inventory, the asset needs to be assigned to a user.

You can either create a new user or assign to an existing one.

We'll discuss how to create a new user more in *"People" on page 137*, but for now, select the **People** tab and then **Add User** to get started.



## Assigning an asset

If you have permissions to manage assets, you can assign assets to a user or yourself.

1. From the **Holding Bin**, select an asset (or assets) by clicking the checkbox to the left of the item.
2. Right-click the item (or use the **Action** dropdown) and select the **Reassign**. The Reassign Asset screen appears.

*Assign to me*

**REASSIGN ASSET**

Select an organization and user within the organization to assign asset(s) to

**ORGANIZATIONS**

Expand All Collapse All

- ▼ Stage JDSU Demo1
  - apl2test
  - ▶ apltest
  - ▶ Beijing
  - ▶ Contractors
  - demo test1
  - DemoCamelCase
  - demolowercase
  - demotest2
  - DEMOUPPERCASE
  - Duranti, Jimmy T
  - ▶ East Region
  - Eningen
  - ImportAssets
  - ▶ North Region
  - ▶ Org7
  - PathTrack
  - ▶ Sri Org
  - Sri Org 2
  - StrataSync
  - ▶ Test1

**People (323)**

Page 1 of 22

Tech ID	First Name	Last Name	Login Name	Role	Organization
demo1	JDSU	Demo1	jdsu.demo1@jdsu...	Administrator	Stage JDSU Demo1
jdsu_demo10	JDSU_demo1_first	JDSU_demo1_last	jdsu_demo10@jds...	Technician2	Stage JDSU Demo1
fro47637	Yvan	Frosio	dsam1@jdsu.com	Administrator	Stage JDSU Demo1
t6d1	t6d1_first	t6d1_last	t6d1_16653523	Unidentified TechId	Stage JDSU Demo1
58729	58729_first	58729_last	58729_16653523	Unidentified TechId	Stage JDSU Demo1
57162	qinqin	liu	qinqin@jdsu.com	Administrator	Stage JDSU Demo1
cui57670	liang	cui	liang.cui@jdsu.com	Technician	Stage JDSU Demo1
kq	Khalid	16653523	kq16653523@jdsu...	Administrator	Stage JDSU Demo1
59075	Yoo-Chul	Shin	yoo-chul.shin@jds...	Administrator	Stage JDSU Demo1
yoochul	YooChul_first	YooChul_last	yoochul_16653523	Unidentified TechId	Stage JDSU Demo1
ycshni	YCShni_first	YCShni_last	ycshni_16653523	Unidentified TechId	Stage JDSU Demo1
ycshin	YCShin_first	YCShin_last	ycshin_16653523	Unidentified TechId	Stage JDSU Demo1
ycs	YCS_first	YCS_last	ycs_16653523	Unidentified TechId	Stage JDSU Demo1
jdsu_demo	JDSU_Demo_first	JDSU_Demo_last	jdsu_demo_16653...	Unidentified TechId	Stage JDSU Demo1
47158	47158_first	47158_last	47158_16653523	Unidentified TechId	Stage JDSU Demo1

Viewing 323 record(s) of 323

Page 1 of 22

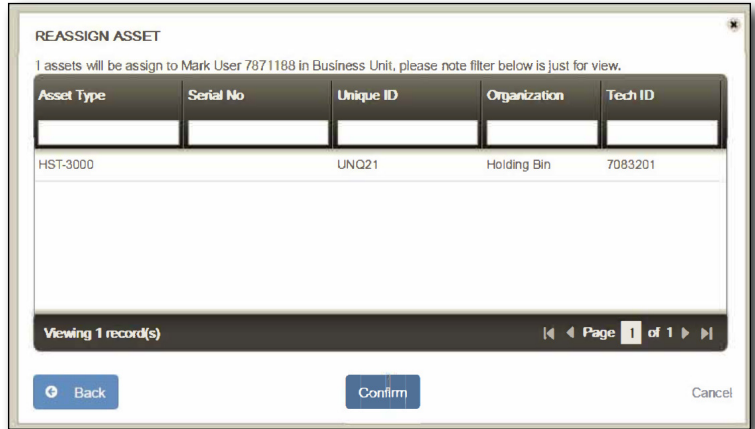
**Reassign** Cancel

### NOTE:



**You can also assign the asset to yourself by selecting *Assign to me* at the top right corner.**

3. Select the organization and a user, then click the **Reassign** button at the bottom.
4. When done, click **Confirm**.



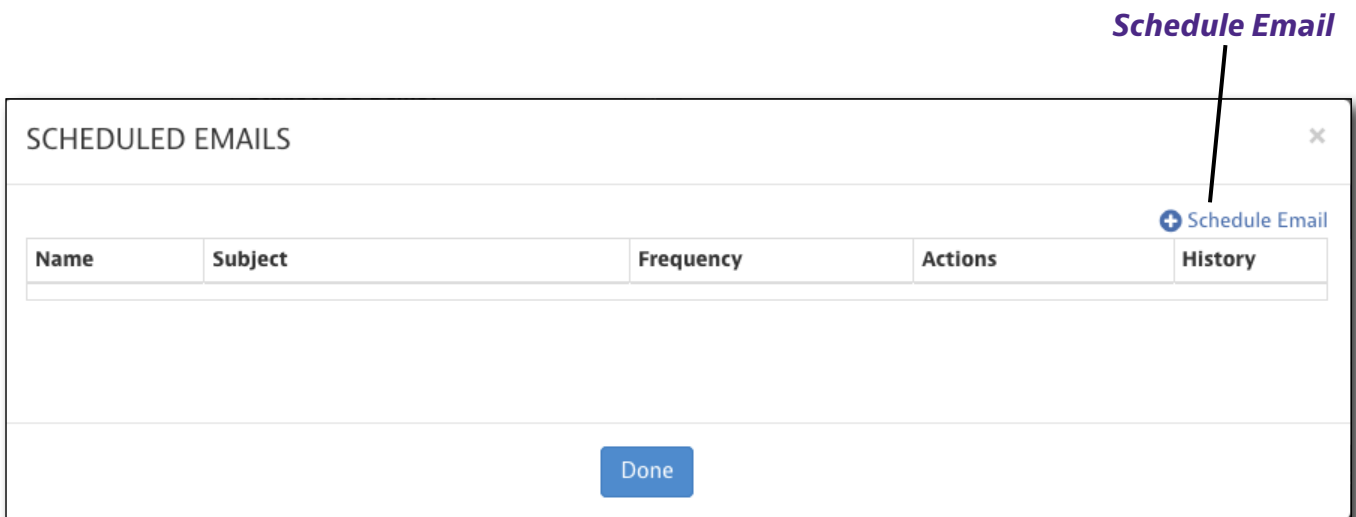
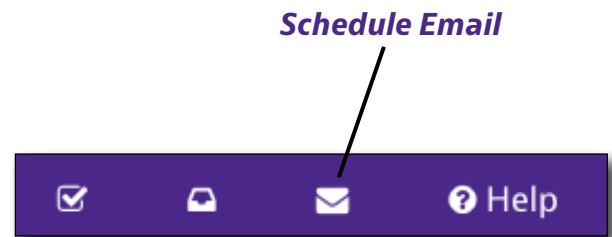
## Scheduling emails

The **Schedule Email** feature allows you to receive periodic emails from StrataSync of various lists, including assets, users, licenses, options, and test data.

You can set up to be notified for any updates to the list and choose the frequency for distribution, but only one list can be included for each email.

Select **Schedule Email**  from the Main toolbar.

From the Scheduled Emails screen, select **Schedule Email**. The Views screen is displayed.



Use the **View Type** dropdown in the top right to choose the type, including: **All, Assets, Licensing, Options, People, and Test Data.**

Select the radio button next to the view you want, then select **Next**. The Schedule Email screen appears.

VIEWS-Select views to add to the Email

View Type All

	View Name	Created By	Last Modified	View Type
<input type="radio"/>	All columns	JDSU Demo1	10/07/2013	ASSET_LIST
<input type="radio"/>	Brian's Cal View	JDSU Demo1	10/23/2013	ASSET_LIST
<input checked="" type="radio"/>	Brian's Org View	JDSU Demo1	10/21/2013	ASSET_LIST
<input type="radio"/>	Brian's View	JDSU Demo1	10/23/2013	ASSET_LIST
<input type="radio"/>	CellAdvisor Only	JDSU Demo1	10/18/2013	ASSET_LIST
<input type="radio"/>	DSAM Only	JDSU Demo1	10/18/2013	ASSET_LIST
<input type="radio"/>	DSAM with 0 sn	JDSU Demo1	05/01/2014	ASSET_LIST
<input type="radio"/>	HST-3000 Only	JDSU Demo1	10/18/2013	ASSET_LIST
<input type="radio"/>	HoldingBin-DSAM	Qinqin Liu	09/12/2016	ASSET_LIST
<input type="radio"/>	HolingBin	Qinqin Liu	07/06/2016	ASSET_LIST

« 1 2 3 4 »

Next Cancel

Click the **Email Frequency** box to bring up the Frequency screen.

SCHEDULE EMAIL

\* Name:

\* Recipients:

\* Subject:

\* Email Frequency:

\* Start Date:

Starts at 6:00am EST

View Name	View Type	Actions
Brian's Org View	ASSET_LIST	<input type="button" value="Delete"/>

« 1 »

Back Save Cancel

Use the **Repeats** dropdown to choose **Daily**, **Weekly**, **Monthly**, or **Yearly**.

Then use the calendar to choose the start and end dates. When finished, select **Done**.

### Frequency ✕

**\* Repeats:**

**\* Repeat every:**  @ Days

**\* Starts on:**

**\* Ends:**

Never

After  occurrences

On

**Summary:** Daily

When you go back to the Schedule Email screen, the email frequency and start date will be updated.

When done, select **Save** to confirm.

### SCHEDULE EMAIL ✕

**\* Name:**

**\* Recipients:**

**\* Subject:**

**\* Email Frequency:**

**\* Start Date:**   
Starts at 6:00am EST

View Name	View Type	Actions
Brian's Org View	ASSET_LIST	<input type="button" value="Delete"/>

Back on the Scheduled Emails list, your new scheduled email will appear.

You can edit, delete, or view the history here later, as well.

Name	Subject	Frequency	Actions	History
Brian's Org View	StrataSync View - Brian's Org View - ASSET_LIST	Daily	<a href="#">Edit</a> <a href="#">Delete</a>	<a href="#">History</a>

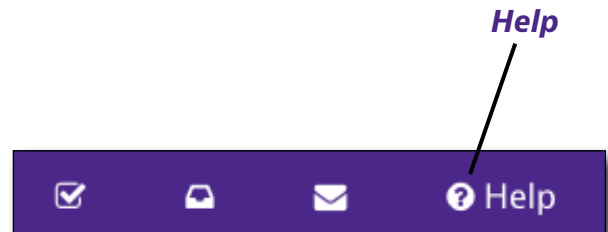
<< 1 >>

Done

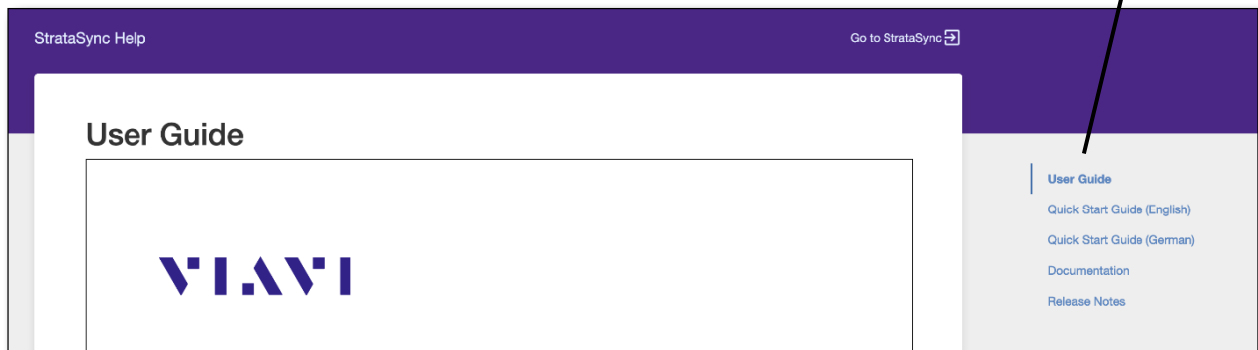
## Help

The Help feature allows you to download PDFs of the *StrataSync User's Guide*, *Quick Start Admin Guide* and the last few versions of software release notes for easy reference.

Select **Help**  **Help** from the Main toolbar.



### Download links





# Analytics

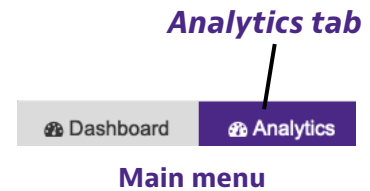
This chapter covers how to use the Analytics features of StrataSync, including the following:

- "Analytics" on page 50
- "Searching" on page 58
- "Sorting" on page 58
- "Views" on page 59
- "Exporting files" on page 60
- "Saving dashboards" on page 61

## Analytics

The **Analytics** tab includes optional **Fiber, 5G, Optimeter, CATV, and Generic Work Order Dashboard** information for instruments in the field if configured for your StrataSync account.

Click the **Analytics** tab in the Main menu to bring up the Analytics Dashboard, then use the filter panel on the left to choose the desired dashboard.



**Note:** This feature requires the StrataSync ANALYTICS subscription plan at a minimum.

### Fiber Dashboard

By default, the **Fiber Dashboard** supports viewing OTDR test results from VIAVI test instruments aggregated according to the organizations configured in the StrataSync account, or by the 'contractorId' indicated in the received test results (e.g. when receiving test results from multiple subcontractors during fiber construction rollout).

The dashboard utilizes an independent set of pass/fail threshold criteria applied to the measurements such as total loss, connector loss, splice loss and reflectance, instead of relying on exact pass/fail criteria used during the test. This threshold set can be customized according to a customer's needs via professional services.

Fiber OTDR test results and Continuity verification are displayed per-Fiber, and aggregated by Cable ID, Location A and Location B (as well as either by Organization or Contractor), and according to the selected relative or absolute date window. Customers can choose to drill-down through the results in a hierarchical view (with summarized pass/fail per-category), or in a tabular or rollup view per-fiber. An overall fiber summary is always displayed, along with a 'trend-by' chart and key metric pie summaries according to the currently selected drill-down category and level. Additionally, a generic search capability and CSV export function are provided.



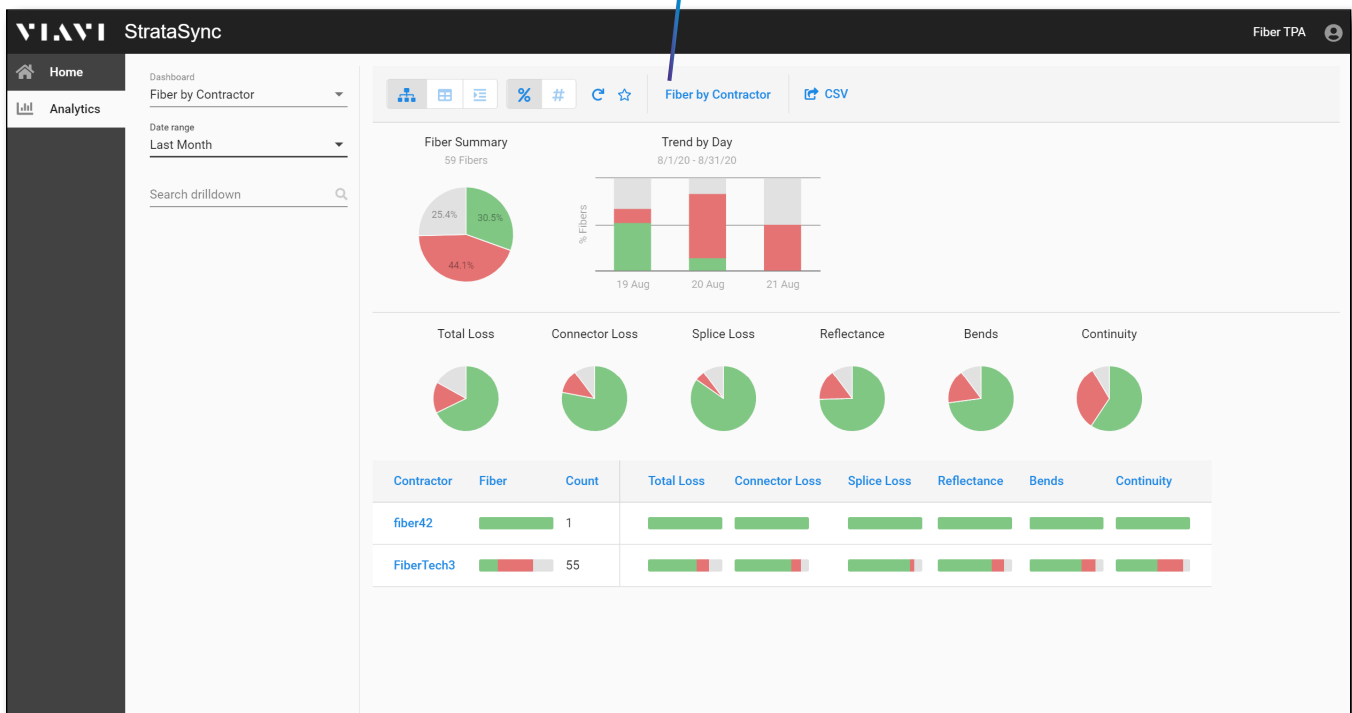
**NOTE:**

***The tabs in the Main menu are dependent on the options available for your StrataSync account. See your VIAVI sales representative for more information.***

This dashboard allows customers to visually track the progress of fiber testing over time, as well as analyze the quality of key metrics by location and contractor so that root causes of issues can be found and performance/quality optimized.

Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results are uploaded.

**Main toolbar**



**Fiber Dashboard**

## 5G Dashboard

The **5G Dashboard** allows you to view closeout reports and testing results in the field using the ONA-800 cable analyzer. This includes, per-cell site results, termination type details, trace metrics related to cable return loss, and Distance To Fault (DTF) length.

Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results are uploaded.

The screenshot shows the StrataSync interface with a sidebar on the left containing 'Home' and 'Analytics' options. The main content area is titled '5G Closeout Test' and features a table with the following columns: Site, Band, Sector, Cable, Termination, Type, Test Time, Trace Min, Trace Max, and DTF Length(m). The table lists 14 test entries for different cell sites, including details on the type of test performed (e.g., CAA Reflection Return Loss, CAA DTF Return Loss) and the resulting trace metrics.

Site	Band	Sector	Cable	Termination	Type	Test Time	Trace Min	Trace Max	DTF Length(m)
Cell Site 1993	aws	Beta	1	Short	CAA Reflection Return Loss	11/3/20 1:57 PM	-1.8067	0.0001	
Cell Site 1993	aws	Beta	1	Load	CAA Reflection Return Loss	11/3/20 1:58 PM	-1.8114	0.0001	
Cell Site 1993	aws	Beta	1	Antenna	CAA Reflection Return Loss	11/3/20 1:58 PM	-1.8141	0.0001	
Cell Site 1993	aws	Beta	1	Short	CAA DTF Return Loss	11/3/20 1:59 PM	-41.0122	0.0338	1.716
Cell Site 1993	aws	Gamma	2	Short	CAA Reflection Return Loss	11/3/20 1:59 PM	-1.8174	0.0001	
Cell Site 1993	aws	Gamma	2	Load	CAA Reflection Return Loss	11/3/20 2:00 PM	-1.82	0.0001	
Cell Site 1993	aws	Gamma	2	Antenna	CAA Reflection Return Loss	11/3/20 2:01 PM	-1.8282	0.0001	
Cell Site 1993	aws	Gamma	2	Short	CAA DTF Return Loss	11/3/20 2:01 PM	-41.2096	0.0381	1.716
Cell Site 1996	aws	Beta	1	Short	CAA Reflection Return Loss	11/6/20 9:44 PM	-1.8556	0.0001	
Cell Site 1996	aws	Beta	1	Load	CAA Reflection Return Loss	11/6/20 9:44 PM	-1.8577	0.0001	
Cell Site 1996	aws	Beta	1	Antenna	CAA Reflection Return Loss	11/6/20 9:45 PM	-1.862	0.0001	
Cell Site 1996	aws	Beta	1	Short	CAA DTF Return Loss	11/10/20 9:54 PM	-39.4123	0.1788	1.716

## 5G Dashboard

## Optimeter Dashboard

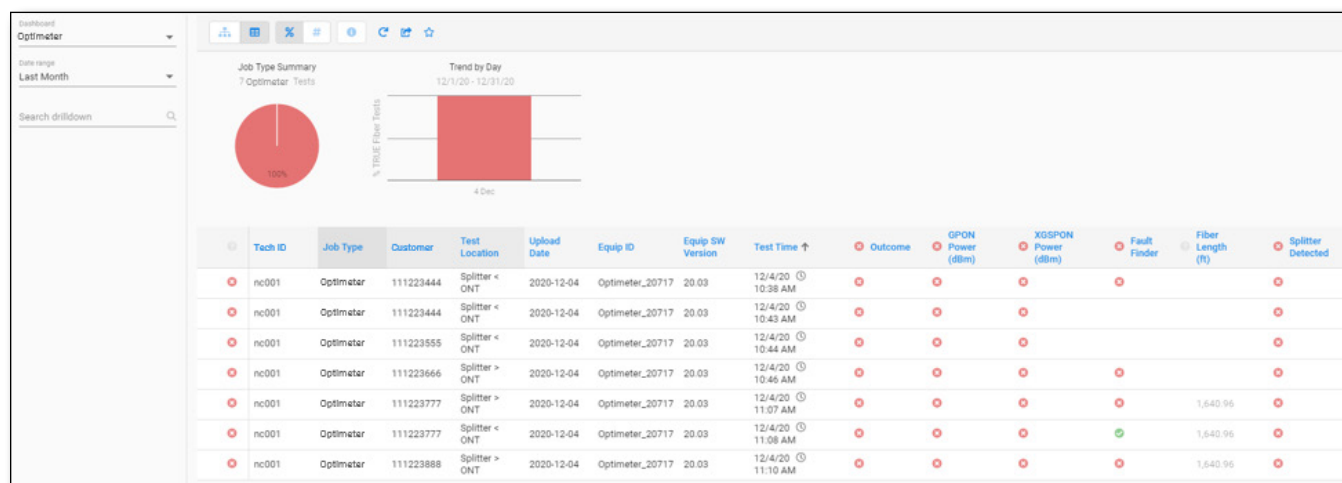
By default, the **Optimeter Dashboard** supports viewing Optimeter test results aggregated according to the organizations configured in the StrataSync account, and the 'techId' indicated in the received test results. The dashboard displays and aggregates pass/fail indicators based on the criteria used during the test.

Optimeter test results are displayed per-Tech ID and may be aggregated by the organization hierarchy defined for the customer account. The timeline for the results is according to the selected relative or absolute date window. Customers can choose to drill-down through the results in a hierarchical view (with summarized pass/fail per-Tech ID), or in a tabular view per-test. An overall summary is always displayed, along with a 'trend-by' chart. Additionally, a generic search capability and CSV/PDF export function are provided.

This dashboard allows customers to visually track the progress of PON testing over time across their technicians, as well as analyze the key metrics so that root causes of issues can be found and performance/quality optimized. For instance, as well as displaying the overall outcome of the test, failures can be distinguished between power levels, faults found, appropriate fiber length and whether the splitter was detected.

This dashboard works best in an overall Test Process Automation solution, whereby PON service activation test workorders are automatically provided to StrataSync, e.g. via StrataSync's Workflow JSON API. This effectively removes the issues associated with poor or no data entry in the field for customer identification, technician IDs and test configuration selection.

Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results are uploaded.



### Optimeter Dashboard

## CATV Dashboards

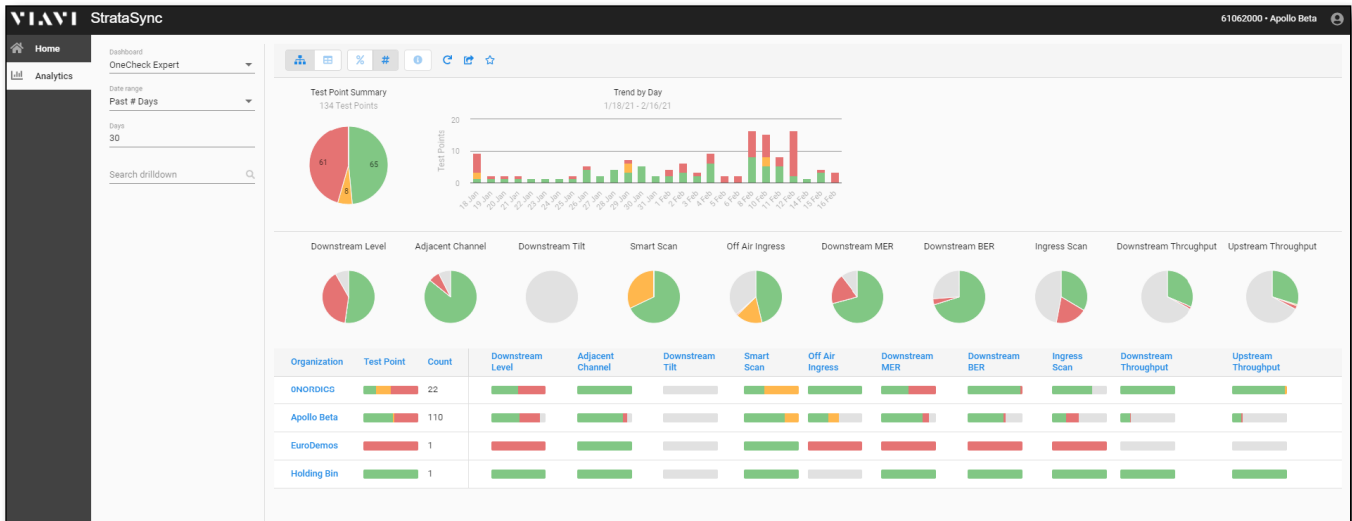
The CATV Dashboards allow you to view closeout reports and testing results in the field using the ONX-6xx (ONX CATV) instruments.

Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results are uploaded.

### OneCheck Expert

The first dashboard “OneCheck Expert” is designed to visualize aggregated test results of type onecheckexpert.json, typically used by maintenance technicians when troubleshooting CATV connections. As well as summarizing Pass/Fail/Marginal test status overall and by time, the dashboard also breaks down results status by key metric type, so administrators can examine if there are specific issues in particular areas or with specific technicians.

The principle aggregation level is at whatever organization levels have been configured for the customer account, and then the second level of drill-down shows results per-technician. Clicking on a technician will then show a tabular view showing test results with pass/fail/marginal status per-metric, including values for specific metrics like Downstream and Upstream Throughput in Mbps.

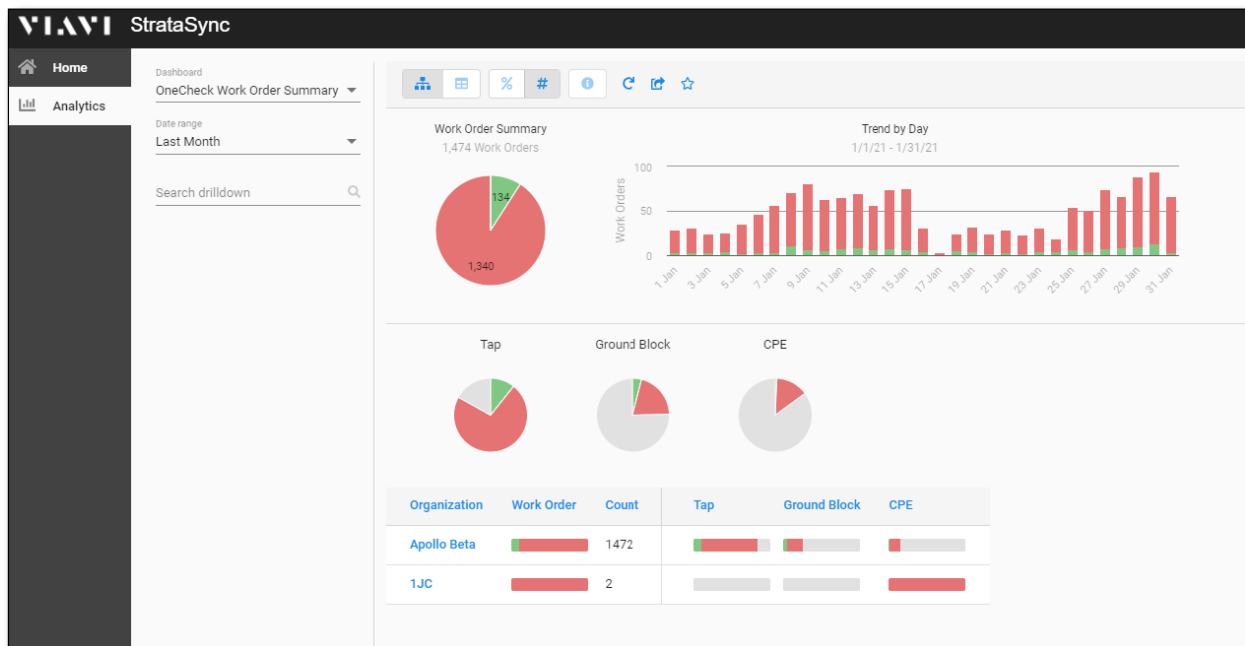


**OneCheck Expert Dashboard**

## OneCheck Work Order Summary

The next two dashboards focus on onecheck.json test results typically used by home technicians. The first dashboard "OneCheck Work Order Summary" summarizes pass/fail status by workorder and over time, as well as breaking down the aggregations by tests by location, e.g. at the Tap, Ground Block or CPE locations.

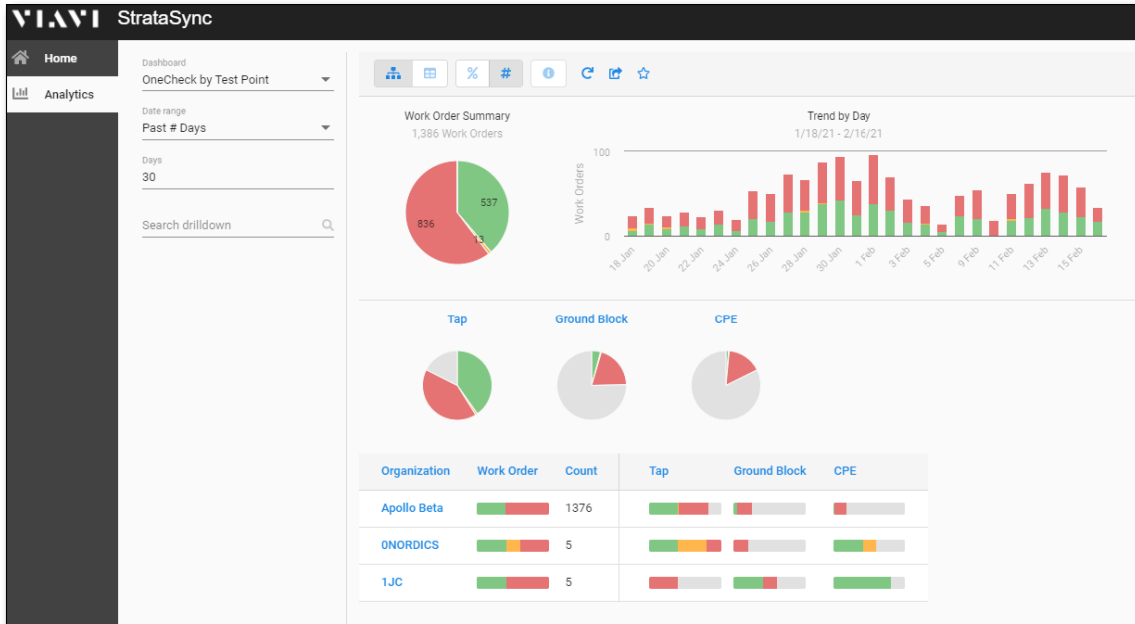
The tabular view starts by further breaking down the results by organization, then clicking on an organization will give a breakdown by technician, and finally clicking on a specific technician will break out the test results per-workorder with per-test location pass/fail status and links back to the original test results files stored in StrataSync.



**OneCheck Work Order Summary Dashboard**

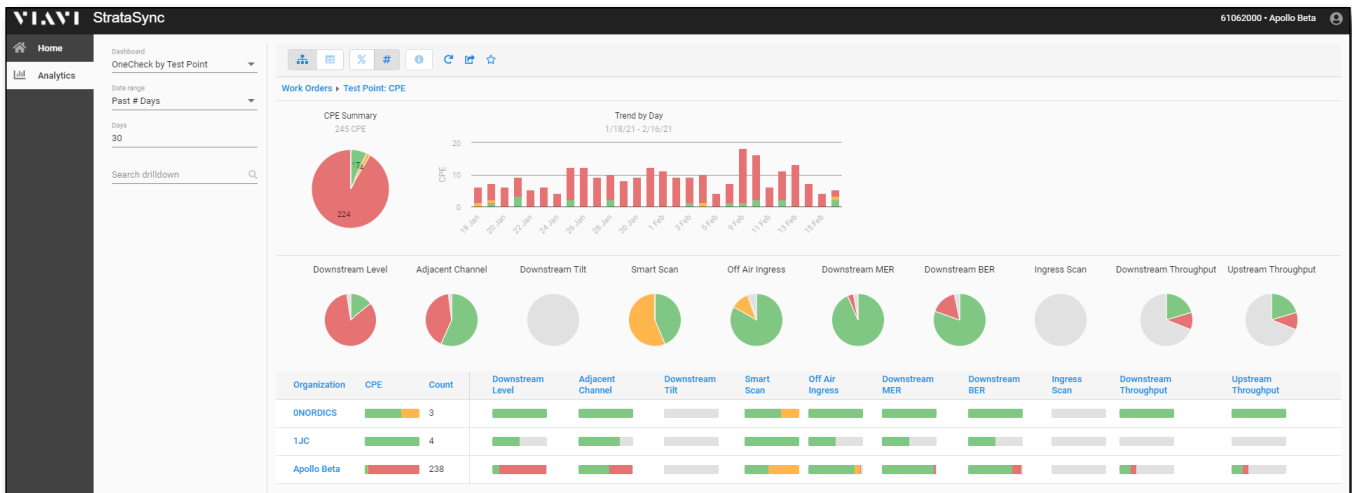
### OneCheck by Test Point

The third dashboard “OneCheck by Test Point” is more test result-focused, as opposed to workorder-focused like the OneCheck Work Order Summary dashboard. As well as summarizing test results overall and over time, and by test location, the user can additionally click on the blue text for the specific location (Tap, Ground Block, or CPE) to filter on test results across organizations and technicians for that location.



**OneCheck by Test Point Dashboard**

In the example below, the user drilled-down on the ‘CPE’ location, which then modifies the view to show detailed metrics for results taken at the CPE. Users can then drill-down by organization and technician as with the previous dashboards.

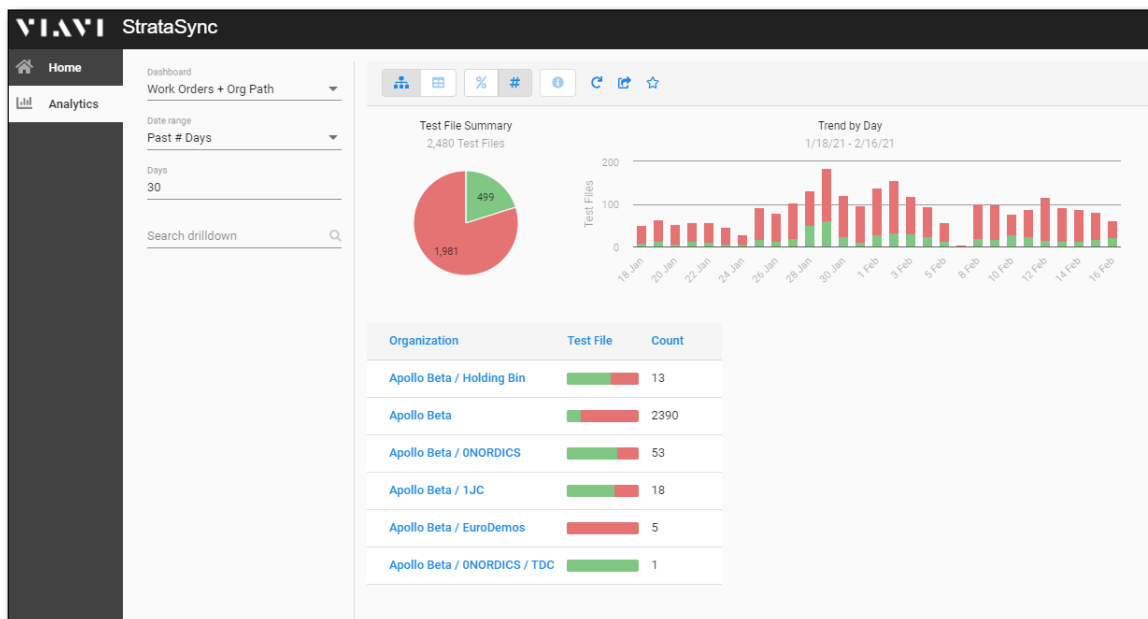


**OneCheck by Test Point Dashboard (drilled down to CPE)**



## Generic Workorder-associated Results Dashboard

The **Work Orders + Org Path Dashboard** supports workorder-associated CDM (Common Data Model) json-formatted test results from any VIAVI test instrument.



### *Work Orders + Org Path Dashboard*

This view highlights the overall pass/fail status for workorder-associated test results, as well as showing a column chart of results over time, based on the 'Date range' selected in the filter section. The tabular section below by default highlights a breakdown by Organization Path as configured for the StrataSync account. Please note that results association may be duplicated for higher-level organizations.

By clicking on any organization path in the tabular section, you can drill down to the per-technician pass/fail results. Clicking on a specific technician (by Tech ID), will drill down to pass/fail results by Work Order ID. Clicking on a specific Work Order ID will provide a breakdown per-test type, and finally clicking on a particular test type will display the filename, sync time, test time and pass/fail status for individual test results for that test type. Additionally users can link to the actual test results file stored in StrataSync.

For test results to be included in this dashboard, they must have the Work Order ID field populated.

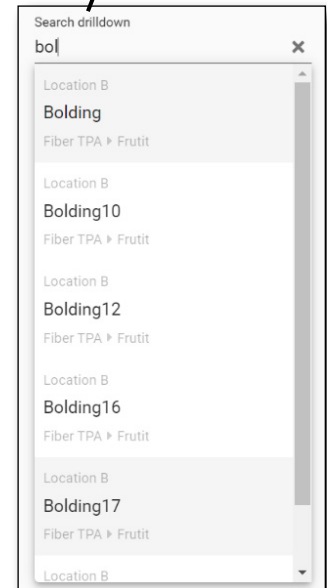
Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results are uploaded.

## Searching

You can search by typing into the **Search drilldown** in the panel on the right. The list updates with the results. Clicking on one of the options will take you straight to that level in the hierarchy

Drilling down provides quick access to any level of the aggregation hierarchy, regardless of which level you have drilled down to. It is especially useful at the highest aggregation level, when you know exactly what you want to drill down to, whether it is a cell site ID or a fiber location.

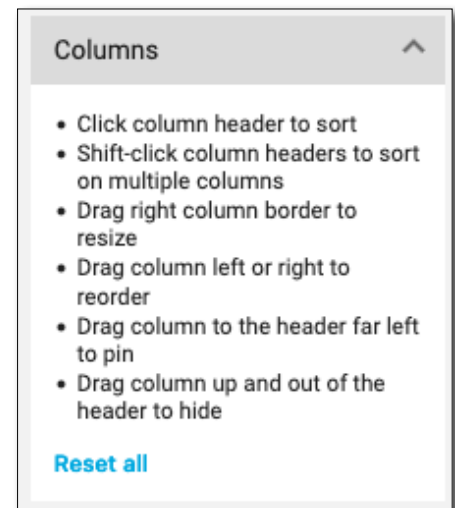
### Search drilldown



## Sorting

You can also easily sort the columns using the **Columns** help section on the left.

This details multiple column sorting, column resizing, column reordering, column pinning and column hiding features. Saving the view as a favorite (star icon in the header) will preserve all column settings applied.



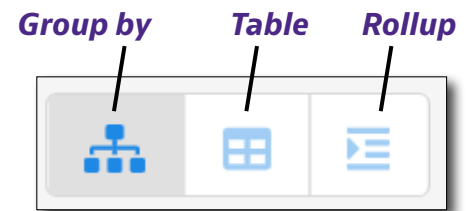
## Views

Several options in the Main toolbar allow you to select the data for the dashboard.

### View options

The configured view options are found at the top of the screen:

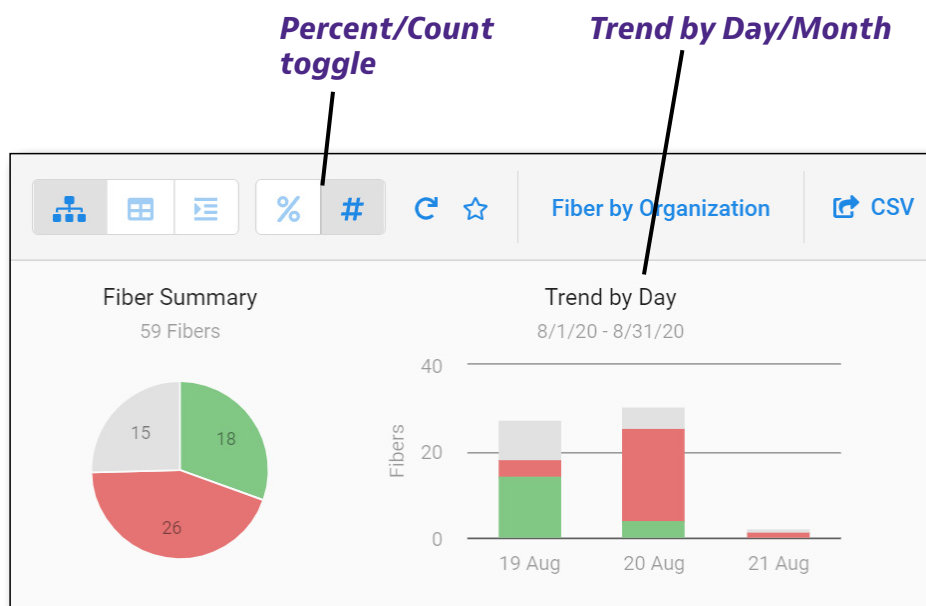
- **Group by** – Top-level aggregation object (e.g. organization)
- **Table** – Commonly aggregated object (e.g. 'Fiber' or 'Site')
- **Rollup** – Tabular drilldown view



### Trend by Day/Month

By default, the **Trend by Day/Month** chart shows % pass/fail/incomplete over time, either by day (if the date range is a month or less), or by month (if the data range is greater than a month).

You can also select the # button in the Main toolbar to toggle counts-per-day/month.

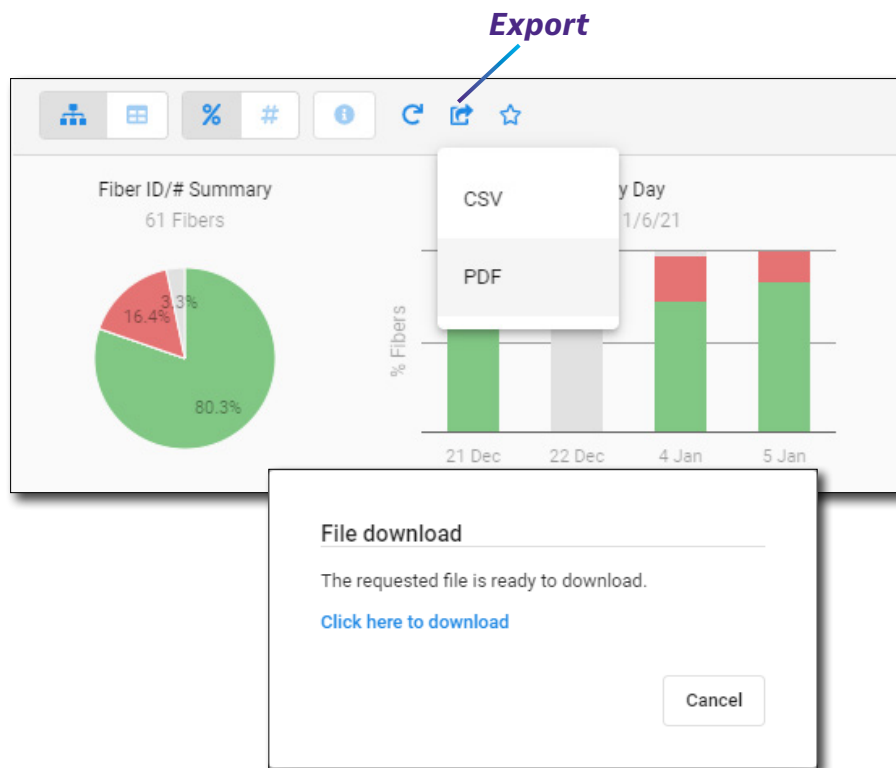


## Exporting files

You can export a CSV or PDF file containing detailed measurements as filtered by the current drilldown hierarchy.

Select **Export** and then choose **CSV** or **PDF** from the dropdown. The PDF option, unlike CSV export, provides the same graphical view as shown in the browser, whereas the CSV export is meant to support downloading the tabular metrics for further offline processing.

After clicking **PDF**, the **Export** button is replaced with a spinning busy wheel. Once the PDF is ready, a file download popup box appears to save to your desktop.



The image shows a screenshot of an Excel spreadsheet with the following data:

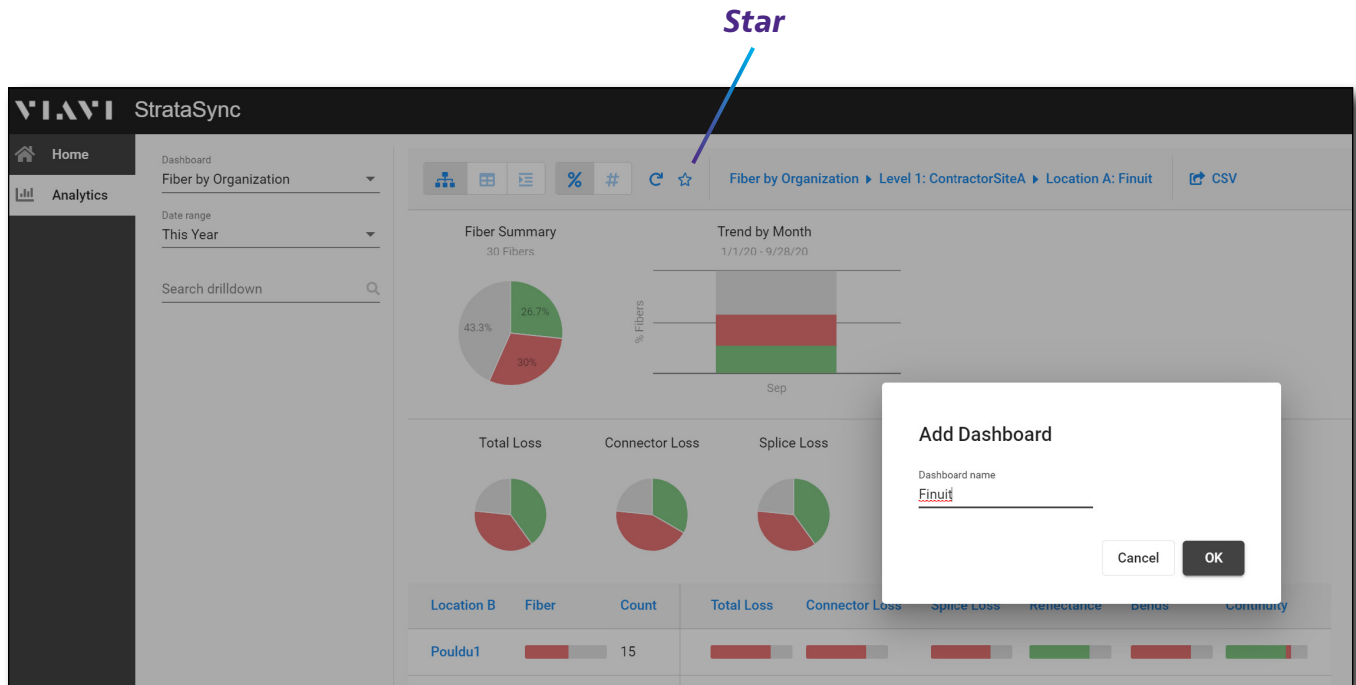
Level 1	Location A	Location E	Fiber	Total Loss	Total Loss	Total Loss	Total Loss	Total Loss	Total Loss	Connecto	Connecto	Splice Los	Splice Los	Reflectan	Reflectan	Bends	Bends Sta	Continuity	Start Time	End Time
Contracto	Finit	Pouldu2	RACK4#1															pass	2020-09-11	2020-09-10T11:45:00.000Z
Contracto	Finit	Pouldu2	RACK4#5															pass	2020-09-11	2020-09-10T11:45:17.000Z
Contracto	Finit	Pouldu2	RACK4#1	1.948	pass	1.948	fail	1.621	pass	0.995	fail	0	pass	-50.15	pass	0	pass	pass	2020-09-11	2020-09-10T11:45:29.000Z
Contracto	Finit	Pouldu2	RACK4#2	1.952	pass	1.952	fail	1.533	pass	1.008	fail	0	pass	-50.15	pass	0	pass	pass	2020-09-11	2020-09-10T11:46:02.000Z
Contracto	Finit	Pouldu2	RACK4#3	1.329	pass	1.329	pass	1.092	pass	0.39	pass	0	pass	-50.24	pass	0	pass	pass	2020-09-11	2020-09-10T11:48:46.000Z
Contracto	Finit	Pouldu2	RACK4#4	1.324	pass	1.324	pass	1.101	pass	0.388	pass	0	pass	-50.22	pass	0	pass	pass	2020-09-11	2020-09-10T11:50:59.000Z
Contracto	Finit	Pouldu2	RACK4#5	1.333	pass	1.333	pass	1.089	pass	0.385	pass	0	pass	-50.24	pass	0	pass	pass	2020-09-11	2020-09-10T11:51:30.000Z
Contracto	Finit	Pouldu2	RACK4#6	1.335	pass	1.335	pass	1.092	pass	0.388	pass	0	pass	-50.21	pass	0	pass	pass	2020-09-11	2020-09-10T11:52:02.000Z

CSV file detail

## Saving dashboards

You can save the dashboard drilldown hierarchy to bring up at any time. This useful is you want to have different view options (e.g. Table vs Rollup) and date ranges.

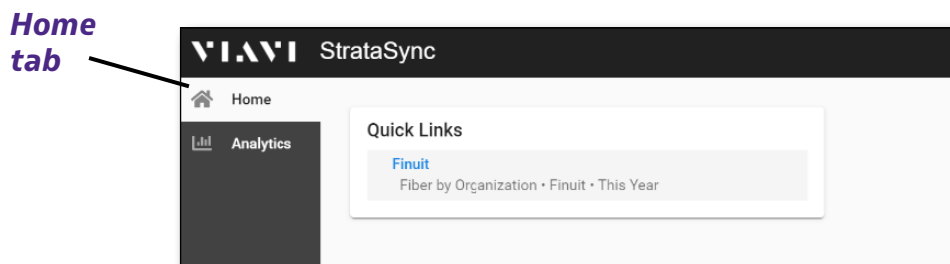
Select the **Star** in the Main toolbar. A pop-up comes up so you can name the dashboard, then select **OK**.



## Viewing dashboards

Your dashboards are saved to the **Home** tab. Select it to see the **Quick Links** dashboards you have saved.

To remove a dashboard, select the one you want to remove, then select the **Star** in the Main toolbar to remove. A pop-up will ask you to confirm, select **OK**.



### Quick Links Dashboards



# Assets

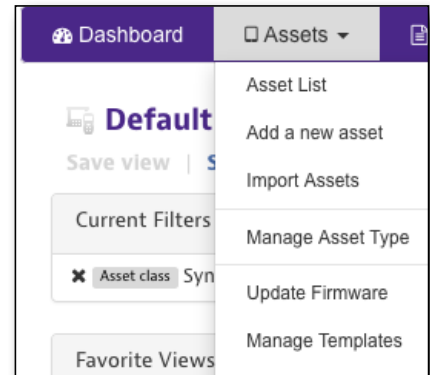
This chapter covers how to use the Asset Management features of StrataSync, including the following:

- "Assets" on page 64
- "Searching and sorting" on page 65
- "Views" on page 68
- "Asset List" on page 71
- "Adding new assets" on page 88
- "Importing assets" on page 89
- "Managing asset types" on page 91
- "Updating firmware" on page 95
- "Managing configuration templates" on page 99
- "Managing asset options" on page 115
- "Managing asset groups" on page 121

# Assets

The **Assets** tab is the hub for all of the asset management features of your StrataSync account, including: adding new assets, importing and editing asset details, updating firmware, managing configuration templates, and deploying software options to your instruments, etc.

Click the **Assets** tab in the Main menu to bring up the Assets dropdown.



Assets dropdown menu

Assets tab

The screenshot shows the 'Assets' tab interface. On the left, there are filters for 'Current Filters' (Model: T-BERD) and 'Favorite Views'. The main area displays a table of assets. The table has the following columns: Asset class, Asset Type, Model, Unique ID, Serial No, Organization, Tech ID, Tech First Name, Tech Last Name, Asset Status, and Last Sync Status. The table contains 15 rows of asset data.

Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status	Last Sync Status
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_2805	2805	Stage JDSU Demo1	demo1	JDSU	Demo1	Stolen	On
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_947	947	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_948	948	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_4709	4709	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 6000A	T-BERD 6000A	T-BERD 6000A_30470	30470	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync N
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0062540051	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 6000A V2	T-BERD 6000A V2	T-BERD 6000A V2_1038	1038	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync N
Syncable	T-BERD/MTS 6000A V2	T-BERD 6000A V2	T-BERD 6000A V2_1039	1039	West Region	west_tech1	West	Tech1	Active	On
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2541	2541	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2548	2548	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	On
Syncable	T-BERD/MTS 6000A	T-BERD 6000A	T-BERD 6000A_30421	30421	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	On
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0062540050	Beijing	jdsu_demo1	jdsu	demo1	Active	On
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_18816	18816	Wangjing	nj070209	nj070209_first	nj070209_last	Active	On
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0071450099	Wangjing	5800 tech	5800 tech_first	5800 tech_last	Active	Sync N

Asset List selected from the Assets tab



## Searching and sorting

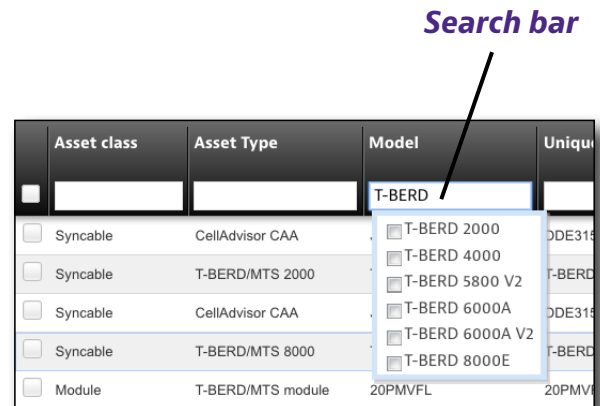
From the Assets List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

### Searching

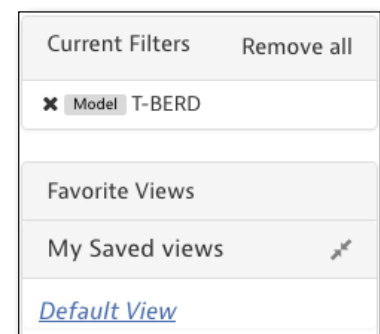
You can search by typing into the search bar under a column header. The list updates with the results.

Make sure to include hyphens for product names, etc., (e.g. T-BERD 2000).

Some of the columns provide dropdowns with relevant options once you start typing.



The filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



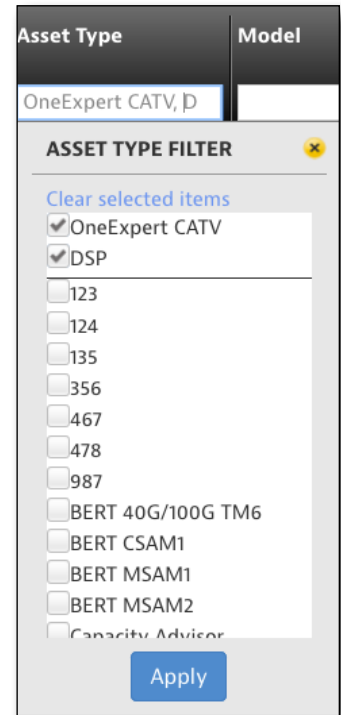
Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status	Last Sync Status
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_2805	2805	Stage JDSU Demo1	demo1	JDSU	Demo1	Stolen	O
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_947	947	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_948	948	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_4709	4709	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 6000A	T-BERD 6000A	T-BERD 6000A_30470	30470	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync N
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0062540051	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 6000A V2	T-BERD 6000A V2	T-BERD 6000A V2_1038	1038	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync N
Syncable	T-BERD/MTS 6000A V2	T-BERD 6000A V2	T-BERD 6000A V2_1039	1039	West Region	west_tech1	West	Tech1	Active	O
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2541	2541	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2548	2548	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	O
Syncable	T-BERD/MTS 6000A	T-BERD 6000A	T-BERD 6000A_30421	30421	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	O
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0062540050	Beijing	jdsu_demo1	jdsu	demo1	Active	O
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_18816	18816	Wangjing	nj070209	nj070209_first	nj070209_last	Active	O
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0071450099	Wangjing	5800 tech	5800 tech_first	5800 tech_last	Active	Sync N

Scroll to the right to reveal more detail, including Software Options and Test Data.

### Filtering multiple items

The Asset Class, Asset Type, and Asset Status columns allow you to select multiple items to filter at the same time (e.g. filter OneExpert and DSP only). When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



#### NOTE:

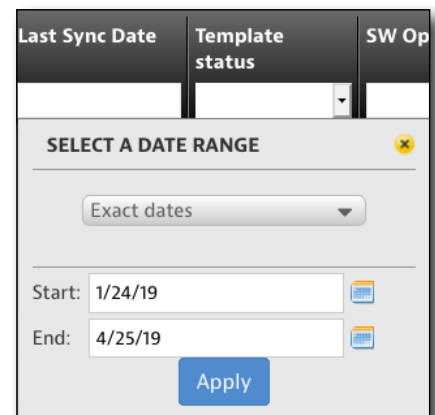
**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Last Sync Date column allows you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Please note the times shown in StrataSync correspond to your local time zone, no matter where the device was synced from.



## Option filters

The SW Options and HW Options columns allow you to use the dropdown to filter by options that are installed or not installed. Click the search box to bring up the options filter dropdown.

Then use the Asset Type dropdown to choose the asset, and options filters. Just start typing to show the list. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

### NOTE:

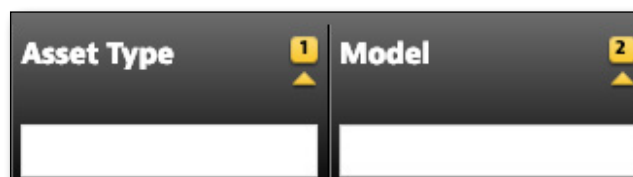


*You can save custom filters to a favorite view for easy reference. See ["Saving views"](#) on page 69.*

## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

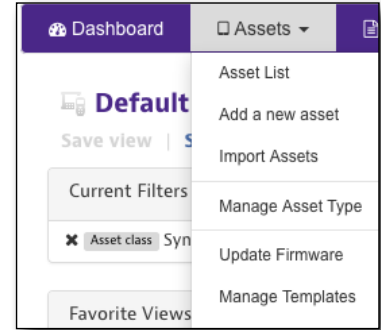


# Views

## Customizing views

StrataSync gives you the ability to customize your list views in a dashboard.

1. Select the **Assets** tab, and then select **Assets List**.  
The Assets List appears.
2. Select **Customize view** at the upper left of the screen.  
The Customize View screens appears.

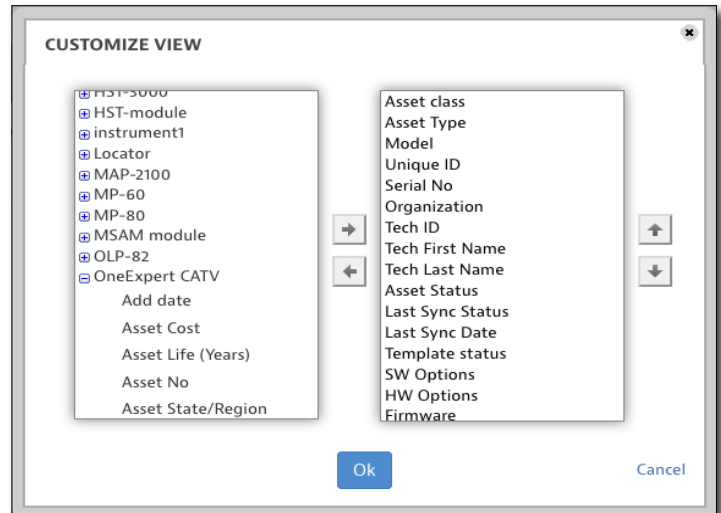


**Save view as**      **Customize view**

Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status	Last Sync Status	Last Sync Date
Syncable	CellAdvisor CAA	JD724C	DDE31588	DDE31588	Stage JDSU Demo1	kk	KK_first	KK_last	Active	OK	03/09/2015 09
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_2805	2805	Stage JDSU Demo1	demo1	JDSU	Demo1	Stolen	OK	04/07/2015 13
Syncable	CellAdvisor CAA	JD724C	DDE31587	DDE31587	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	OK	05/11/2016 05
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_847	947	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_848	948	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	T-BERD/MTS 6000A	MTS 6000A	MTS 6000A_31028	31028	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync Needed	08/03/2016 15
Syncable	DSAM	DSAM-6300	3021451	3021451	East Region	1890	jon	doe	Active	Sync Needed	10/21/2013 16
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_4709	4709	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	DSAM	DSAM-6300	1101215	1101215	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	10/24/2013 12
Syncable	DSAM	DSAM 1234	AT-1383124816903	AT-1383124816903	Stage JDSU Demo1				Active	Sync Needed	
Syncable	DSAM	DSAM-6000	0020451	0020451	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	11/11/2013 10
Syncable	DSAM	DSAM-6300	0192099	0192099	Stage JDSU Demo1	fro47637	Yvan	Frosio	Active	Sync Needed	11/08/2013 07
Syncable	DSAM	DSAM-6000	0176202	0176202	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	11/12/2013 08
Syncable	T-BERD/MTS 6000A	MTS 6000A	MTS 6000A_00002	00002	Stage JDSU Demo1	tsd1	tsd1_first	tsd1_last	Active	Sync Needed	12/10/2013 15
Syncable	SmartClass TPS	SCTPS-AB-CU	000000654321	000000654321	West Region	4580409	4580409_first	4580409_last	Active	OK	02/05/2014 04

Assets List Default View

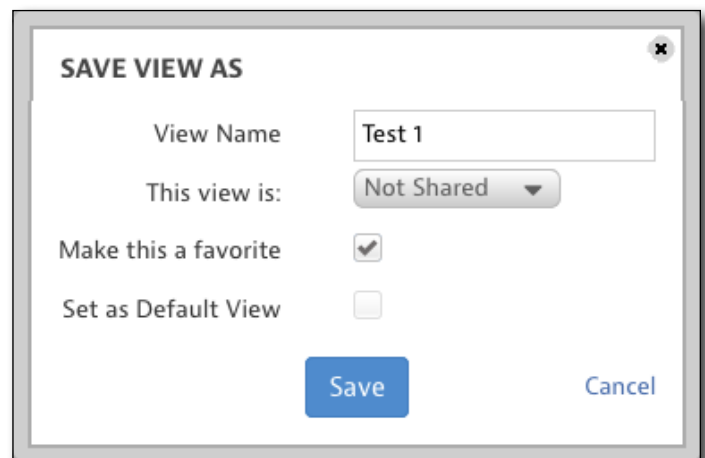
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



## Saving views

- From the Assets List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
- Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
- When done, click **Save**.

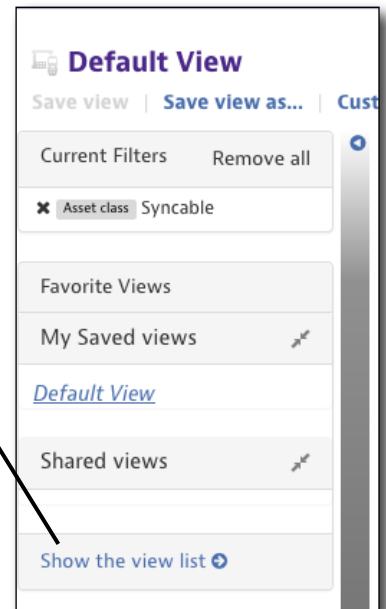
The new view is listed under the Favorite Views section on the left.



## Sharing and editing views

1. From the Assets List, select **Show the view list** on the left side of the screen. The Saved and Shared Views screens appears.

*Show the view list*



2. Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
3. When finished, click **Done**.

SAVED AND SHARED VIEWS						
View Name	Created By	Last Modified	Shared	Favorite	Default	Actions
All columns	JDSU Demo1	10/07/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
B Test 1	Barry Howell	01/21/2019	Not Shared	<input type="checkbox"/>	<input type="radio"/>	<a href="#">Rename</a> <a href="#">Delete</a>
Brian's Cal View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's Org View	JDSU Demo1	10/21/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
CellAdvisor Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM with 0 sn	JDSU Demo1	05/01/2014	Shared	<input type="checkbox"/>	<input type="radio"/>	
HST-3000 Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	

[Done](#)

**Note:** Once a shared view is created, it cannot be edited. You need to create a new one and delete the old one.

## Asset List

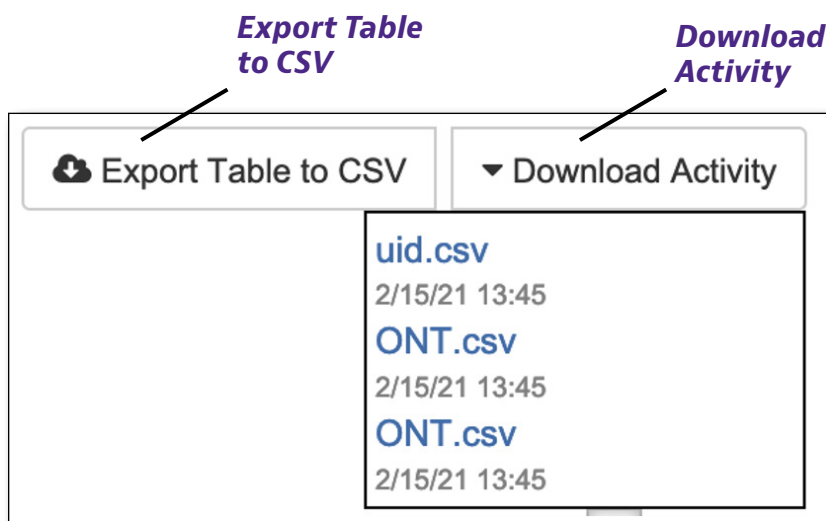
### Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

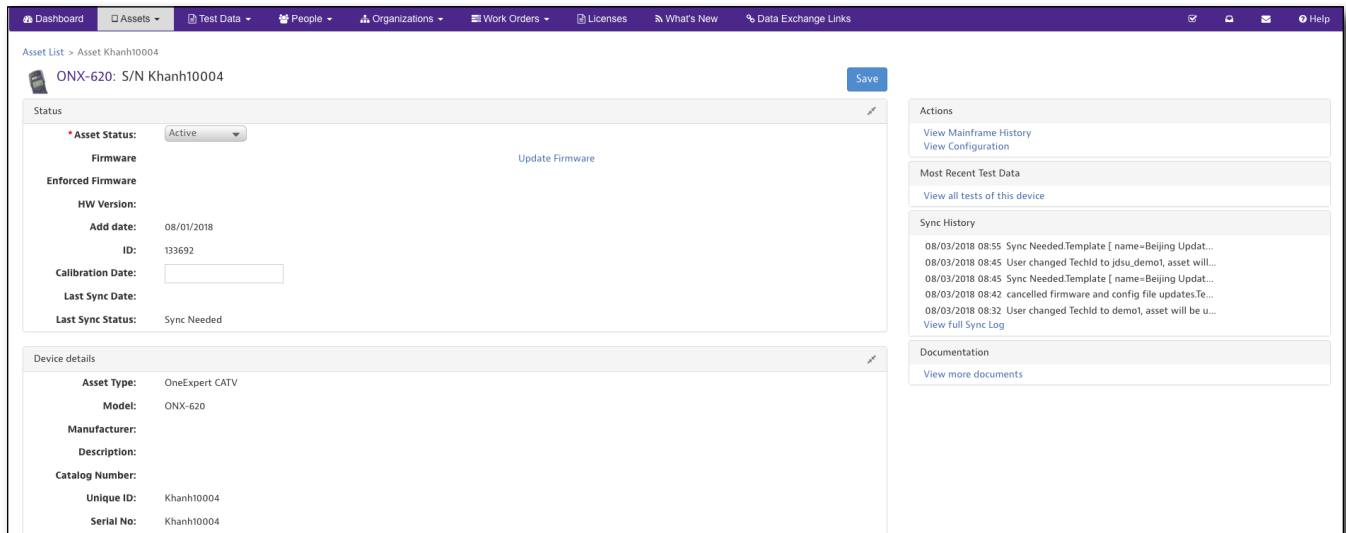
Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

## Editing asset details

1. From the Assets List, select a view on the left that includes the asset you want to edit or use the filters to find it.
2. Double click the asset to bring up the details screen.
3. Edit the information as needed, then click **Save** to confirm.



**NOTE:**

***You don't have to manually add syncable assets. Just sync them to automatically add them and all details to your Asset List.***

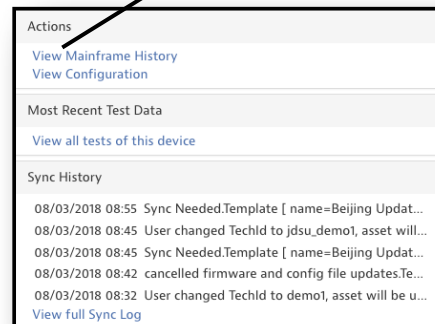


### View mainframe history

From the Asset Details screen, you can view the Mainframe History.

On the right side under the Actions panel, select **View Mainframe History**. The Mainframe Module History screen is displayed.

### View Mainframe History



MAINFRAME MODULE HISTORY - T-BERD 8000E - S/N 947				
Timestamp	Action	Parent ID	ID	Module Description
10/18/2013 10:59	attached	T-BERD 8000E_947	E80EBTPCK_812	

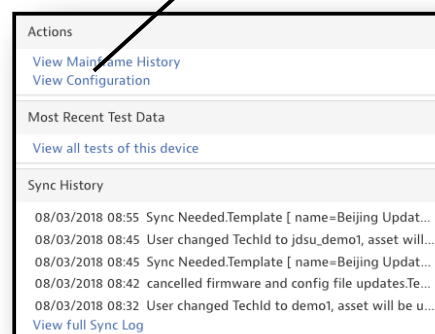
Page 1 of 1

### View configuration

From the Asset Details screen, you can view the Asset Configuration information.

On the right side under the Actions panel, select **View Configuration**. The Configuration Artifacts screen is displayed.

### View Configuration



Depending on the instrument type, configuration files are organized into single or multiple sections (Channel Plan, Limit Plan, etc). Select a category to show just show that type of configuration.

Also, you can right-click a configuration file for more options, including:

- **View**
- **Edit\***
- **Rename\***
- **Deploy** – Deploy this configuration to another unit
- **Archive** – Save this configuration to the Global Archive for all users
- **Copy to template**
- **Export**
- **Delete\***

The screenshot displays the 'Configuration Artifacts' section for an asset (DSAM-6300: S/N 3021451). The interface includes a navigation menu on the left with options like 'Channel Plan', 'Limit Plan', and 'General Configuration'. The main area shows a table of configuration artifacts with columns for Name, Path, Created On, Created By, Modified On, and Modified By. A note above the table states: 'NOTE: Modifying configuration artifacts from this page will automatically be deployed to this asset during next sync and disconnect this asset from its template'. A 'Channel Plan Global Archive' link is also visible.

Name	Path	Created On	Created By	Modified On	Modified By
Indianapolis	/config/location/Indianapolis	10/18/2013 17:06		10/22/2013 16:28	jdsu.demo1@jdsu.com
NCTA	/config/location/NCTA	10/18/2013 17:06		10/23/2013 12:58	jdsu.demo1@jdsu.com
NCTA1	/config/location/NCTA1	10/18/2013 17:06		10/23/2013 13:22	jdsu.demo1@jdsu.com
brian	/config/location/brian	10/18/2013 17:06		10/24/2013 09:33	jdsu.demo1@jdsu.com
greg	/config/location/greg	10/18/2013 17:06		10/24/2013 10:44	jdsu.demo1@jdsu.com
bbc	/config/location/bbc	07/24/2016 23:13	qinqin@jdsu.com	07/25/2016 22:06	qinqin@jdsu.com



**NOTE:**

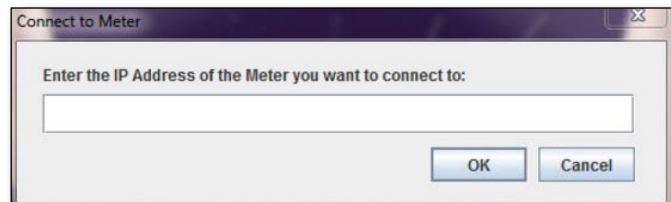
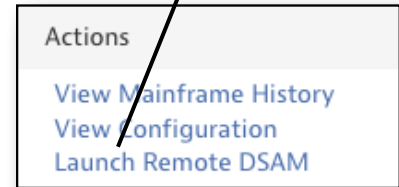
***For Edit, Rename, and Delete, changes will be applied to the instrument on the next sync. This also removes this instrument from its template.***

## Launch remote DSAM (DSAM instruments only)

From the Asset Details screen, you can remotely connect to a DSAM unit.

1. On the right side under the Actions panel, select **Launch Remote DSAM**.
2. Follow the instructions to launch Java, if prompted.
3. Once completed, a DSAM picture is displayed. Select Connection > Connect to Meter from the top menu.
4. Enter the DSAM IP address and click **OK**.

**Launch Remote DSAM**



**Note:** The DSAM must be set in virtual mode for the connection to be established. This can be configured in the DSAM as follows:

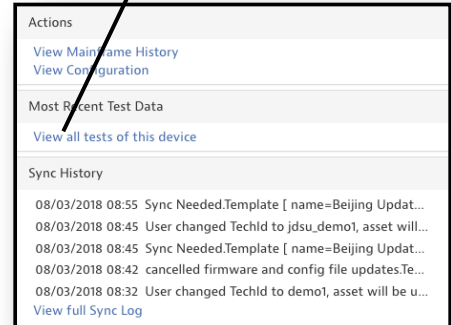
- Config > General > Diagnostic
- Select "use virtual dsam" and click **ENTER**. The IP address for use in the step above will be displayed.

### View test data

From the Asset Details screen, you can view all the test data on the device.

On the right side under the Actions panel, select **View all tests of this device**. The Test Data History screen is displayed.

**View all tests on this device**



Dashboard | Assets | **Test Data** | People | Organizations | Work Orders | Licenses | What's New | Data Exchange Links

**Default View**  
 Save view | Save view as... | Customize view | Schedule Email

Current Filters: Remove all  
 X Asset Primary Key: 39580

Favorite Views  
 My Saved views  
 Default View  
 Shared views  
 Show the view list

Download Report

Actions For 0 selected record(s) Page 1 of 1

Asset Type	Asset Serial No	Asset Unique ID	Data Type	Data Format	Status	Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full O
<input type="checkbox"/> DSAM	3021451	3021451	Level	text/xml	Fail	10/21/2013 16:46	10/21/2013 16:45	ground block	/measfiles/128964/Cable... East Region	Stage	
<input type="checkbox"/> DSAM	3021451	3021451	Level	text/xml	Fail	10/21/2013 16:50	10/21/2013 16:49	tv	/measfiles/128964/TV/v... East Region	Stage	
<input type="checkbox"/> DSAM	3021451	3021451	Level	text/xml	Fail	10/21/2013 16:50	10/21/2013 16:48	tap	/measfiles/128964/Tap/... East Region	Stage	
<input type="checkbox"/> DSAM	3021451	3021451	Level	text/xml	Fail	10/21/2013 16:50	10/21/2013 16:47	modem	/measfiles/128964/Cable... East Region	Stage	

Viewing 4 record(s) Page Size 15 Page 1 of 1

## View sync log

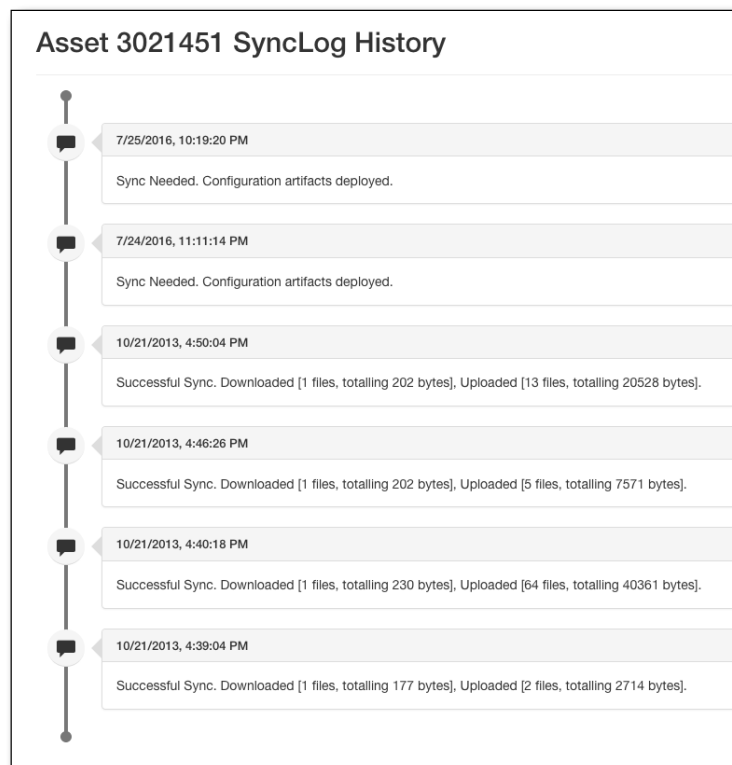
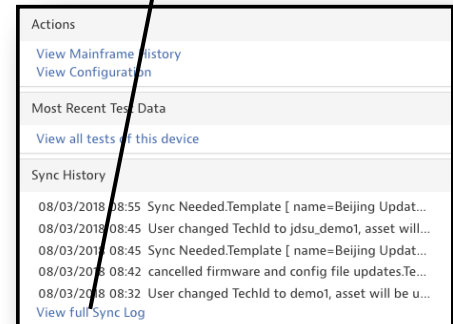
From the Asset Details screen, you can view the configuration sync history of the device.

The sync log shows all the data transfers with a device, including sync timing or if a sync is needed to deploy configuration artifacts, test data, and when firmware has been updated, etc.

This can be very helpful in making sure your assets are up to date and all data has been synced.

On the right side under the Actions panel, select **View Full Sync Log**. The Sync Log History screen is displayed.

## View Full Sync Log

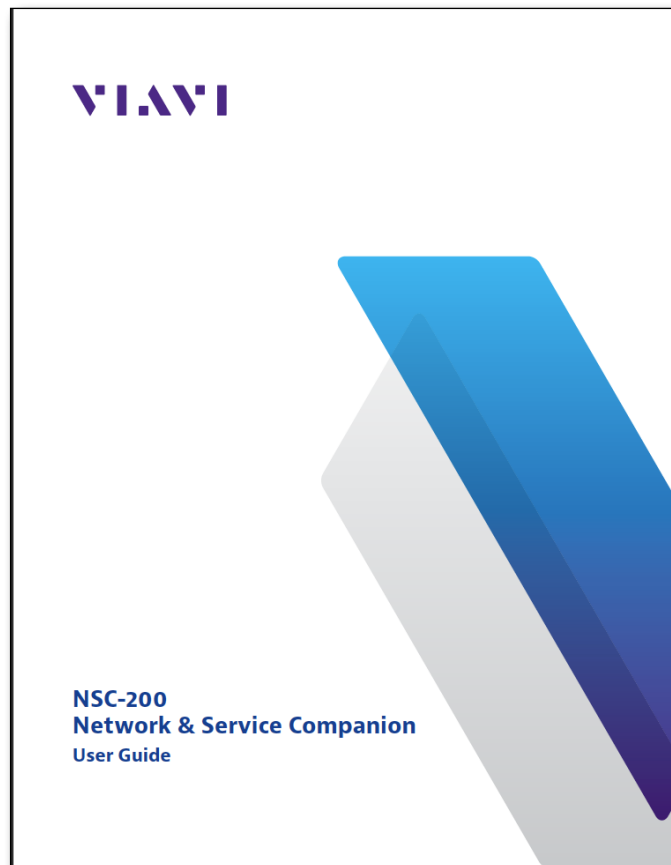
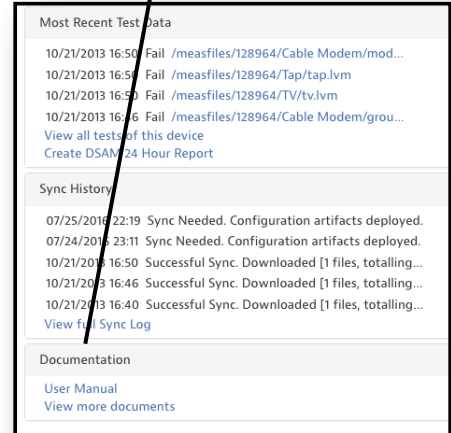


### View documentation

From the Asset Details screen, you can view additional documentation for the device, including the user manual.

On the right side under the Actions panel, select **User Manual** or **View More Documents**. The user manual for the device is displayed.

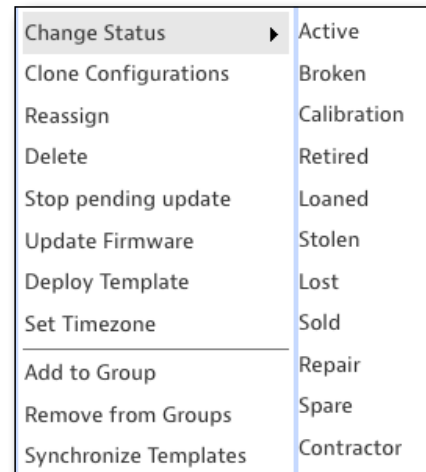
### View documentation



## Changing asset status

1. From the Assets List, select a view on the left that includes the asset you want to change or use the filters to find it.
2. Right-click the asset and choose **Change Status**.

Select the new status from the dropdown: **Active, Broken, Calibration, Retired, Loaned, Stolen, Lost, Sold, Repair, Spare, or Contractor.**



## Reassigning an asset

Reassigning assets from the Assets List is similar to how you assign assets from the Holding Bin.

1. From the Assets List, select an asset (or assets) by clicking the checkbox to the left of the item.
2. Right-click the item (or use the **Action** dropdown) and select the **Reassign**. The Reassign Asset screen appears.
3. Select the organization and a user, then click the **Reassign** button at the bottom.

*Assign to me*

**REASSIGN ASSET**

Select an organization and user within the organization to assign asset(s) to

**ORGANIZATIONS**

Search for an Organization

Expand All Collapse All

Stage JDSU Demo1

- apl2test
- aplttest
- Beijing
- Contractors
- demo test1
- DemoCamelCase
- demolowercase
- demotest2
- DEMOUPPERCASE
- Duranti, Jimmy T
- East Region
- Eningen
- ImportAssets
- North Region
- Org7
- PathTrack
- Sri Org
- Sri Org 2
- StrataSync
- Test1

**People (323)**

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Tech ID	First Name	Last Name	Login Name	Role	Organization
demo1	JDSU	Demo1	jdsu.demo1@jdsu...	Administrator	Stage JDSU Demo1
jdsu_demo10	JDSU_demo1_first	JDSU_demo1_last	jdsu_demo10@jdsu...	Technician2	Stage JDSU Demo1
fro47637	Yvan	Frosio	dsam1@jdsu.com	Administrator	Stage JDSU Demo1
t6d1	t6d1_first	t6d1_last	t6d1_16653523	Unidentified TechId	Stage JDSU Demo1
58729	58729_first	58729_last	58729_16653523	Unidentified TechId	Stage JDSU Demo1
57162	qinqin	liu	qinqin@jdsu.com	Administrator	Stage JDSU Demo1
cui57670	liang	cui	liang.cui@jdsu.com	Technician	Stage JDSU Demo1
kq	Khalid	16653523	kq16653523@jdsu...	Administrator	Stage JDSU Demo1
59075	Yoo-Chul	Shin	yoo-chul.shin@jdsu...	Administrator	Stage JDSU Demo1
yoochul	YooChul_first	YooChul_last	yoochul_16653523	Unidentified TechId	Stage JDSU Demo1
ycshni	YCShni_first	YCShni_last	ycshni_16653523	Unidentified TechId	Stage JDSU Demo1
ycshin	YCShin_first	YCShin_last	ycshin_16653523	Unidentified TechId	Stage JDSU Demo1
ycs	YCS_first	YCS_last	ycs_16653523	Unidentified TechId	Stage JDSU Demo1
jdsu_demo	JDSU_Demo_first	JDSU_Demo_last	jdsu_demo_16653...	Unidentified TechId	Stage JDSU Demo1
47158	47158_first	47158_last	47158_16653523	Unidentified TechId	Stage JDSU Demo1

Viewing 323 record(s) of 323

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Reassign Cancel

### NOTE:



**You can also assign the asset to yourself by selecting *Assign to me* at the top right corner.**



- When done, click **Confirm**.

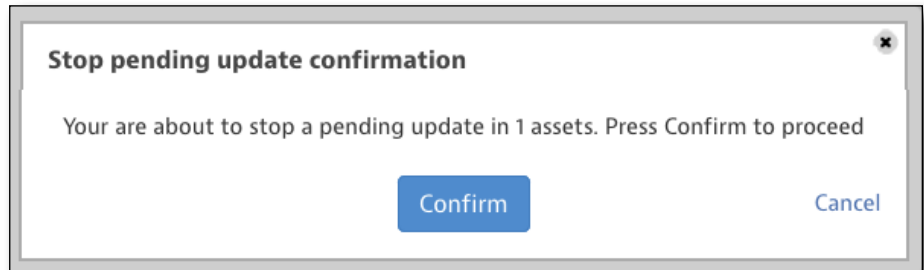
Asset Type	Serial No	Unique ID	Organization	Tech ID
HST-3000	UNQ21	Holding Bin	7083201	

## Deleting an asset

- From the Assets List, select the checkbox next to the asset (or assets) you want to delete.
- Right-click the item (or use the **Action** dropdown) and select **Delete**.
- A confirmation screen asks you to confirm. Click **Confirm**.

## Stop pending update

1. From the Assets List, select the checkbox next to the asset (or assets) you want to stop pending updates.
2. Right-click the item (or use the **Action** dropdown) and select **Stop Pending Updates**.
3. A confirmation screen asks you to confirm. Click **Confirm**.



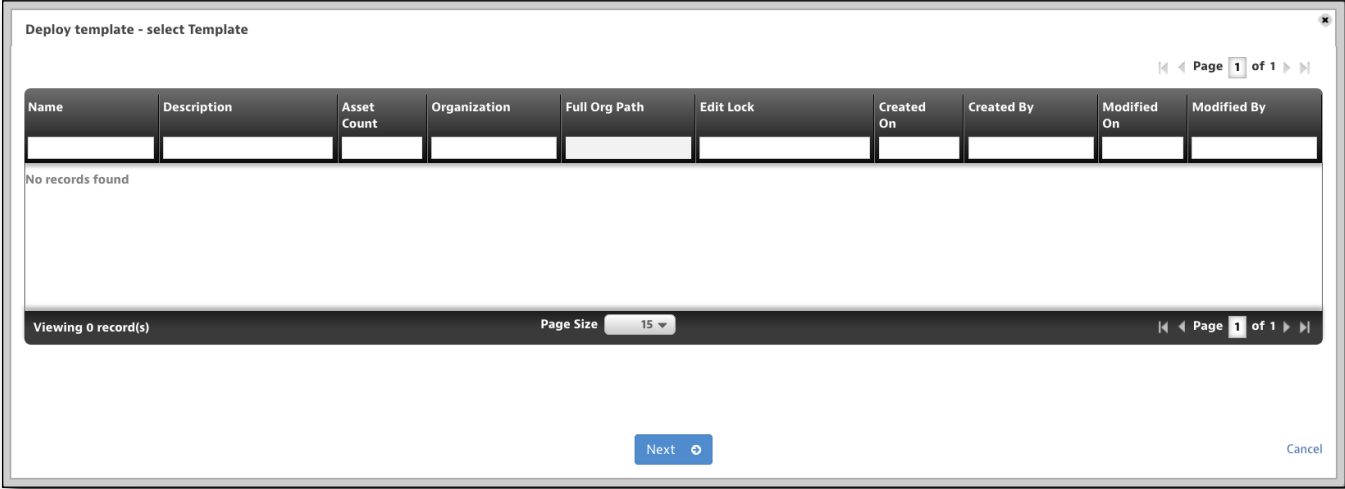
## Update firmware

If you have the right permissions, you can update firmware of the assets right from the Assets List.

1. From the Assets List, select the checkbox next to the asset (or assets) you want to update.
2. Right-click the item (or use the **Action** dropdown) and select **Update Firmware**.
3. A confirmation screen asks you to confirm. Click **Confirm**.

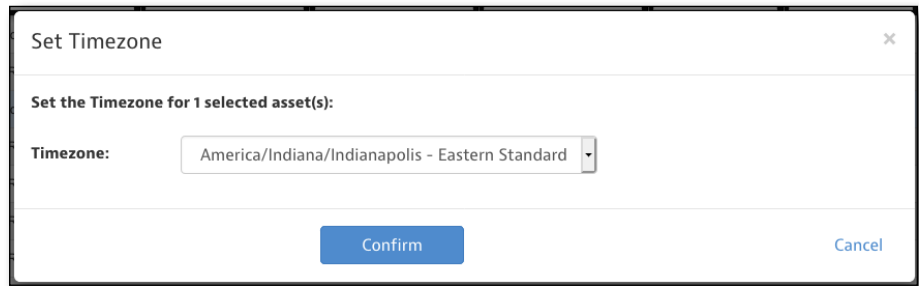
## Deploying a configuration template

- 1. From the Assets List, select the checkbox next to the asset (or assets) where you want to deploy a template.
- 2. Right-click the item (or use the **Action** dropdown) and select **Deploy Template**. The Deploy Template screen is displayed.
- 3. Select the template to deploy and click **Next**.
- 4. A confirmation screen asks you to confirm. Click **Confirm**.



## Set timezone

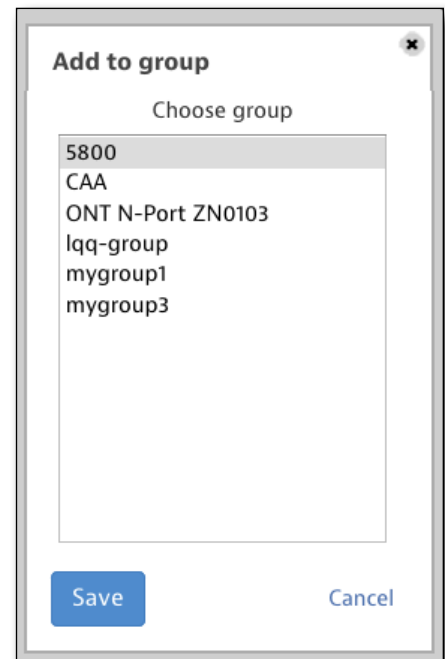
1. From the Assets List, select the checkbox next to the asset (or assets) you want to set the timezone.
2. Right-click the item (or use the **Action** dropdown) and select **Set Timezone**. The Set Timezone screen is displayed.
3. Select the timezone from the dropdown and click **Confirm**.



## Add to group

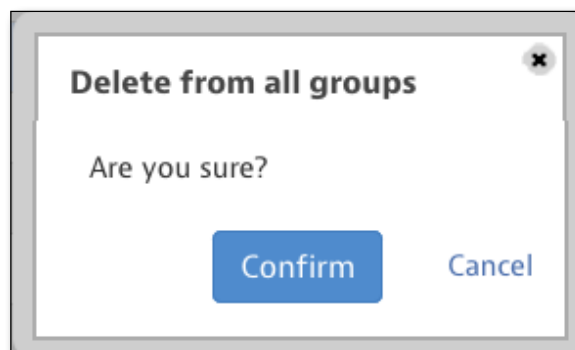
Asset groups provide a way to organize your assets for easy management and deployment.

1. From the Assets List, select the checkbox next to the asset (or assets) you want to add to an asset group.
2. Right-click the item (or use the **Action** dropdown) and select **Add to Group**. The Add to Group screen is displayed.
3. Select the group from the list and click **Save**.



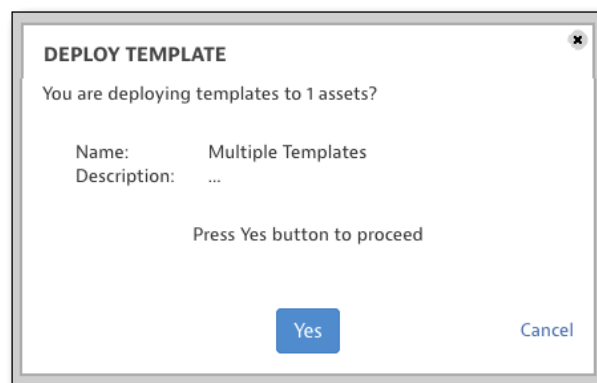
## Remove from groups

1. From the Assets List, select the checkbox next to the asset (or assets) you want to remove from asset groups.
2. Right-click the item (or use the **Action** dropdown) and select **Remove from Groups**. The Add to Group screen is displayed.
3. A confirmation screen asks you to confirm. Click **Confirm**.



## Synchronize configuration templates

1. From the Assets List, select the checkbox next to the asset (or assets) you want to sync with its assigned template.
2. Right-click the item (or use the **Action** dropdown) and select **Synchronize Templates**.
3. A confirmation screen asks you to confirm. Click **Yes**.



## Generate reports

1. From the Assets List, select the checkbox next to the asset (or assets) you want to create a report for (applicable instruments only).
2. Right-click the item (or use the **Action** dropdown) and select **Generate Report**, then choose **Utilization** or **Installed Options**.

For the Utilization Report, select the catalog number and time period, then click **View Report**. It is only available for floating and timed floating options.

The Installed Options Report is generated automatically, as shown below.



**NOTE:**  
**The Reporting features are only available if you purchased the option.**

**Generate Utilization Report** ✕

Note: The Utilization Report is only available for Floating and Timed Floating options.  
No floating or time\_floating option license has been assigned to this asset.

\* Asset Type T-BERD/MTS 8000

\* Catalog Number ▼

\* Time Period Last 30 days ▼

View Report
Cancel

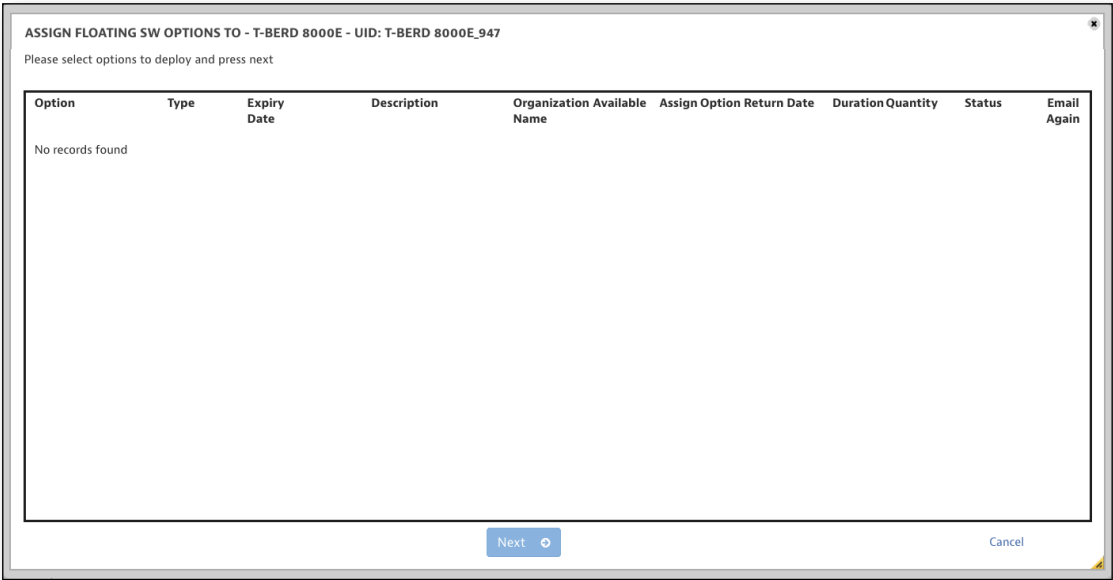
Dashboard Assets Test Data People Organizations Work Orders Licenses What's New Data Exchange Links

**Installed Options Report** Download Report ▼ ReportDate: 1/25/19, 2:35 PM

Asset Type	Organization Name	Serial No	Unique ID	Tech ID	Tech Name	Parent Type	Parent Serial No	Option Name
T-BERD/MTS 8000	Beijing	947	T-BERD 8000E_947	jdsu_demo1	jdsu_demo1@jdsu....			Anywhere.SMART_ACC...
T-BERD/MTS 8000	Beijing	947	T-BERD 8000E_947	jdsu_demo1	jdsu_demo1@jdsu....			OTDR.SMARTLINK

## Options

1. From the Assets List, select the checkbox next to the asset you want to deploy the option to.
2. Right-click the item (or use the **Action** dropdown) and select **Options**, then choose **Floating Options** or **Software Options**.
3. Select the options you want to include, then click **Next** to deploy.



Floating Options list



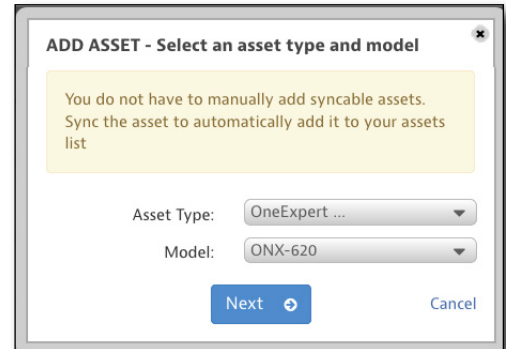
Software Options list

## Adding new assets

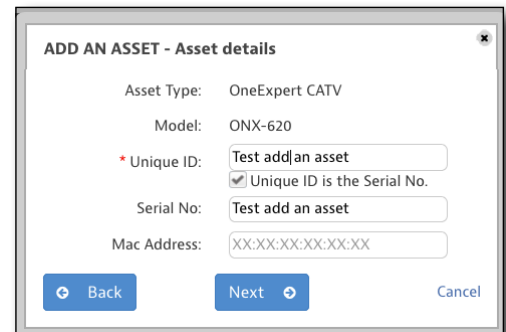
This section details how to add syncable assets to StrataSync. This method isn't recommended, as you can add assets just by syncing them.

1. Select the **Assets** tab, and then select **Add a New Asset**. The Add Asset screen appears.

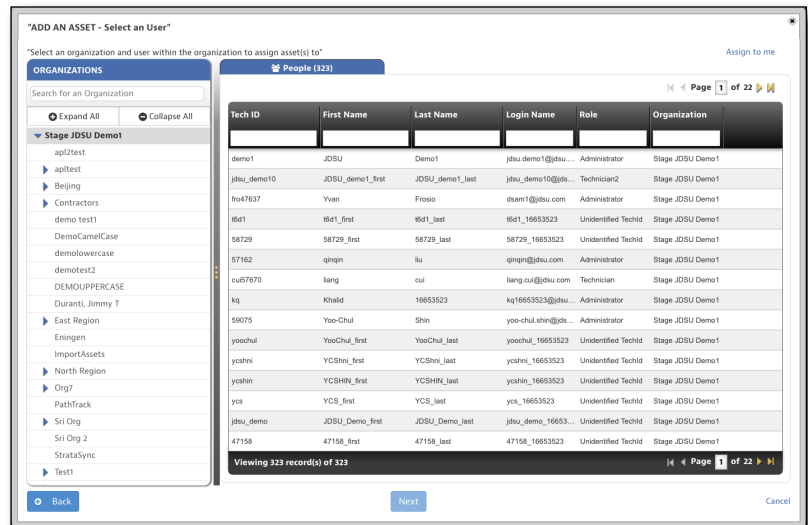
As mentioned on the right, remember that you don't have to manually add syncable assets. Just sync an asset to automatically add it and all details to your Assets List.



2. Select the asset type and model, then click **Next**. The Asset Details screen appears.



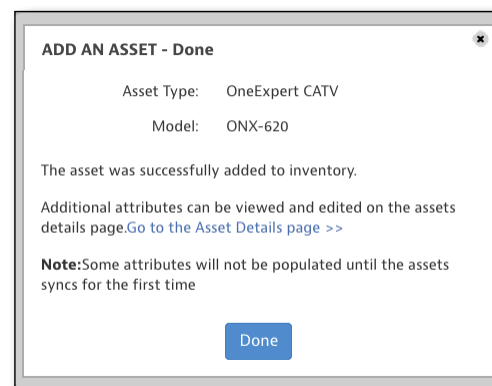
3. Select a user for the asset, then click **Next**. The Select a User organization screen appears.





- Click **Done** to confirm and create the asset.

You can make further edits to the asset by selecting **Asset Details**.



## Importing assets

This section details how to import multiple non-syncable assets from a CSV file to the Holding Bin. This can be any equipment with a MAC address, including 3rd party.

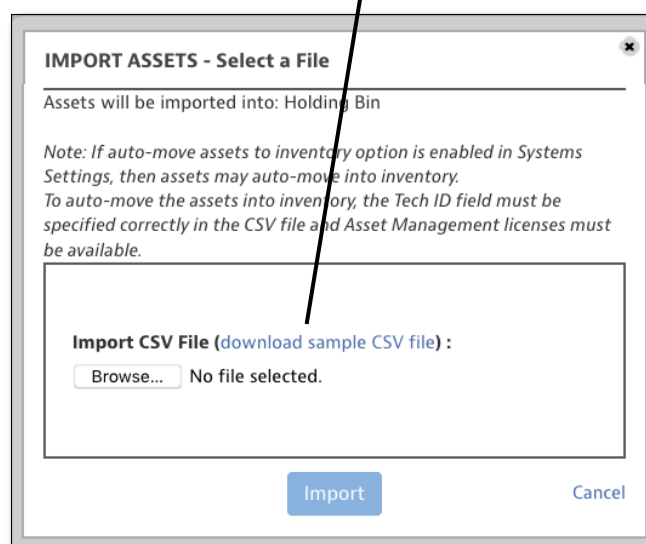
- Select the **Assets** tab, and then select **Import Assets**. The Import Assets screen appears.
- To download a sample CSV file already formatted for StrataSync, select **Download sample CSV file**.

Make sure you retain the header row and enter the data fields starting on row 2, as follows:

- Asset type
- Unique ID
- MAC address
- Serial No.

- Select **Browse** and choose the file you want to import, then select **Import**. The assets will be imported into the Holding Bin.

### Download sample CSV



#### **NOTE:**



***If the auto-move assets to inventory option is enabled in Systems Settings, assets may auto-move into inventory.***

***The Tech ID field must be specified correctly in the CSV file for this to happen.***

## Unique asset IDs

When importing assets for VIAVI instruments, use the following chart for the unique IDs, exactly as shown. Make sure to include the prefix and underscore (e.g. *T-BERD 2000 V2\_{Serial Number}*), for the T-BERD 2000.

Asset Type	Model	Unique ID
CellAdvisor 5G	CA5000	CA5000_{Serial Number}
CX300	CX300	CX300_{Serial Number}
FiberChek	FiberChek	FiberChek_{Serial Number}
MAP-2100	MAP-2100	MAP-2100_{Serial Number}
ONA-800	ONA-800	ONA-800_{Serial Number}
ONA-1000	ONA-1000	ONA-1000_{Serial Number}
Optimeter	Optimeter	Optimeter_{Serial Number}
SmartOTDR	SmartOTDR	SmartOTDR_{Serial Number}
T-BERD/MTS 2000 V2	T-BERD 2000 V2	T-BERD 2000 V2_{Serial Number}
T-BERD/MTS 4000 V2	T-BERD 4000 V2	T-BERD 4000 V2_{Serial Number}
T-BERD/MTS 4000 V2	T-BERD 4000 V2	T-BERD 4000 V2_{Serial Number}
T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_{Serial Number}
T-BERD/MTS 5800-100G	T-BERD5800-100G	T-BERD5800-100G_{Serial Number}
T-BERD/MTS 6000A V2	T-BERD 6000A V2	T-BERD 6000A V2_{Serial Number}



**NOTE:**

***The file must be saved as a regular CSV format, not UTF-8.***

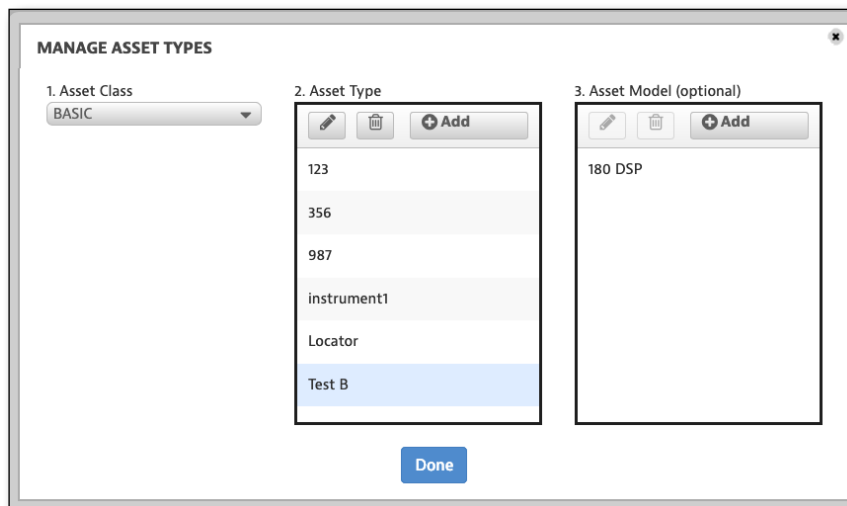
## Managing asset types

This feature allows you to manage your syncable or non-syncable asset types manually, including associating asset types and models to an asset class.

Select the **Assets** tab, and then select **Manage Asset Type**. The Manage Asset Types screen appears.

### Asset classes

1. From the **Asset Class** dropdown, choose from **Basic**, **Basic\_Instrument**, or **Accessory**.
2. Once you choose a class, you will see the asset types associated to that class.
3. Select an asset type, or edit, delete, or add a new one using the buttons at the top.



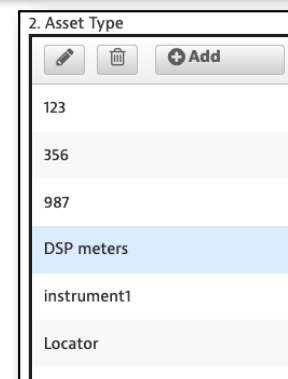
### Asset types

#### Adding asset types

Select the **Add** button at the top of the **Asset Type** column. The Create Asset Type screen is displayed.

Enter the information as needed, including adding a name, description, and any URLs you want to include, and click **Done**.

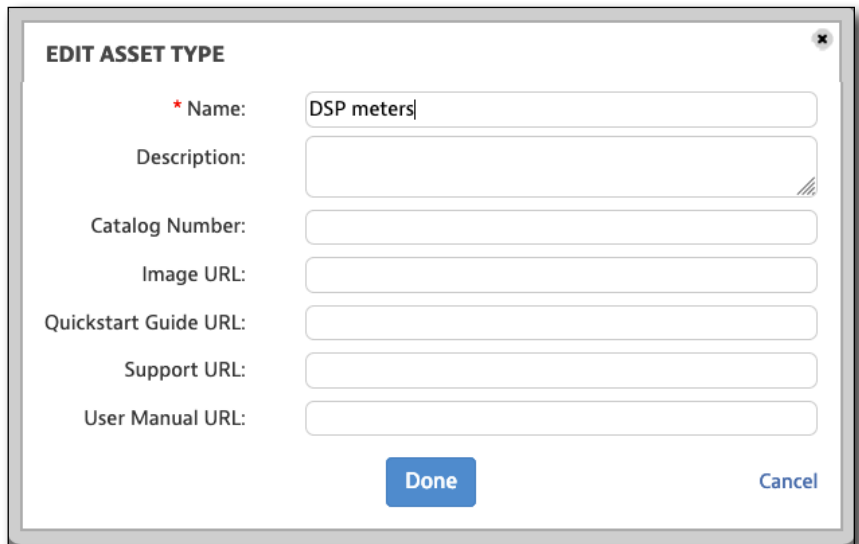
The new asset type will appear in the list, as shown here.



### Editing asset types

Select the asset you want to edit, then select the edit button at the top of the **Asset Type** column.

Edit the information as needed, including adding a description and any URLs you want to include, and click **Done**.



**EDIT ASSET TYPE**

\* Name: DSP meters

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

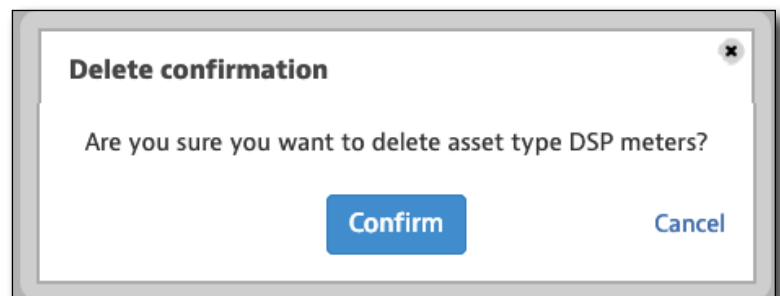
Support URL:

User Manual URL:

Done Cancel

### Deleting asset types

Select the asset you want to delete, then select the delete button at the top of the **Asset Type** column. A confirmation screen asks you to confirm. Click **Confirm**.



**Delete confirmation**

Are you sure you want to delete asset type DSP meters?

Confirm Cancel

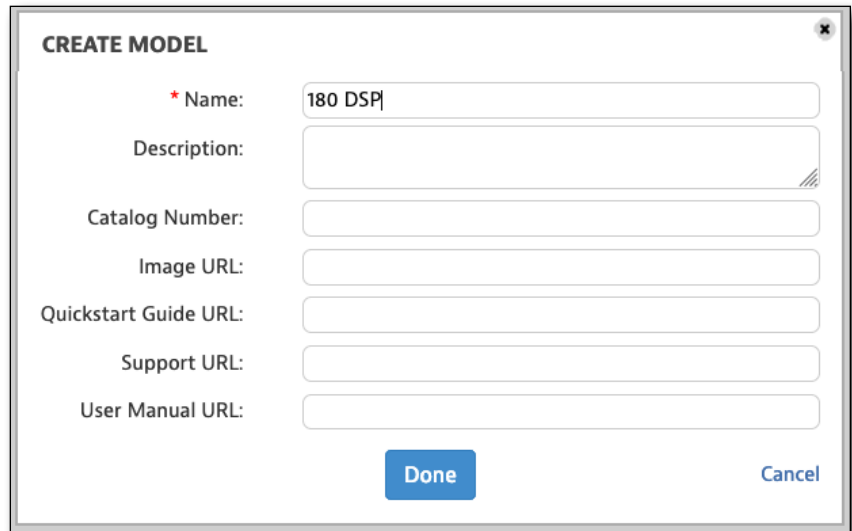
## Asset models

### *Adding asset models*

Select the **Add** button at the top of the **Asset Model** column. The Create Model screen is displayed.

Enter the information as needed, including adding a name, description, and any URLs you want to include, and click **Done**.

The new asset model will appear in the list, as shown here.



**CREATE MODEL**

\* Name: 180 DSP

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

Support URL:

User Manual URL:

Done Cancel



3. Asset Model (optional)

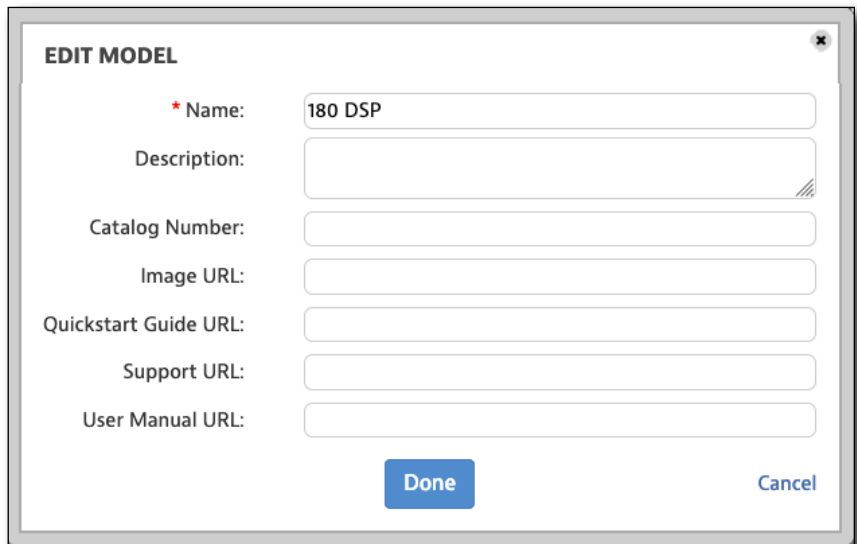
180 DSP

Add

### Editing asset models

Select the model you want to edit, then select the edit button at the top of the **Asset Model** column.

Edit the information as needed, including adding a description and any URLs you want to include, and click **Done**.



**EDIT MODEL**

\* Name: 180 DSP

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

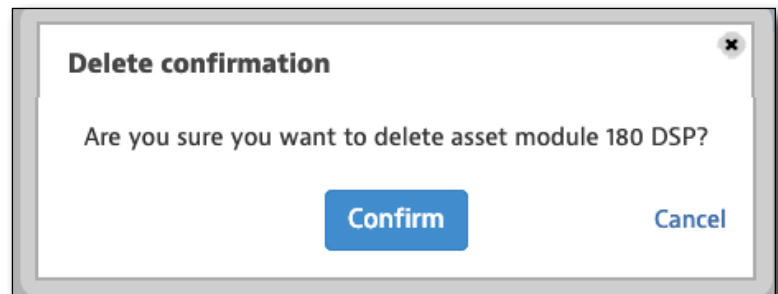
Support URL:

User Manual URL:

Done Cancel

### Deleting asset models

Select the model you want to delete, then select the delete button at the top of the **Asset Model** column. A confirmation screen asks you to confirm. Click **Confirm**.



**Delete confirmation**

Are you sure you want to delete asset module 180 DSP?

Confirm Cancel

## Updating firmware

This feature allows you to manage firmware versions for all of your assets. You can choose to update via the online database or upload your own packages for beta testing, etc.

Select the **Assets** tab, and then select **Update Firmware**. The Update Firmware screen appears.

See "[Managing firmware versions](#)" on page 40 and "[Firmware management](#)" on page 237.

### Online updates

This is the recommended method for updates to ensure you have the latest version from our server.

1. Select **Online updates** as the update method, then select the asset type from the dropdown.
2. Click **Next**. The Update Packages screen is displayed with your available packages.

UPDATE FIRMWARE - Select an update method

Select a method and press next button to proceed

Select an update method:  Online updates  Upload package

Select an asset type to view available online updates: OneExpert ...

Next

3. Select a package you want to download.

By selecting the **Enforce Firmware Version** checkbox at the top, the firmware version will be sent to the units upon a sync to indicate this firmware version needs to be installed.

Remember when downloading firmware packages to unzip the file and follow instructions in the Read Me file.

4. Click **Next**. The Select Assets screen is displayed.

UPDATE FIRMWARE - Choose an update package

When downloading a firmware package, please unzip and follow instructions in the "readme" file

Enforce Firmware Version

Package Name	Version	Release Date	Status
3.7105	3.7105	2018/06/08	Beta
3.3.433	3.3.433	2017/02/24	Alpha

Back Next

5. Select the assets you want to update by selecting the checkboxes next to each item. Then click **Next**. A confirmation screen appears.
6. Review the information and click **Yes** to confirm. The assets will then be scheduled to update to the firmware on the next sync.

**UPDATE FIRMWARE - Select assets**

Actions For 0 selected record(s) Page 1 of 134

Asset No	Serial No	Unique ID	Firmware	Enforced Firmware	HW Version	Organization	Tech ID	Tech First Name	Tech Last Name
<input type="checkbox"/>		ARQA0001150001				Stage JDSU Demo1	demo1	JDSU	Demo1
<input type="checkbox"/>	RRQA0050762491	RRQA0050762491	2.1.10		1.0	Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10001	Khanh10001				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10003	Khanh10003				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10004	Khanh10004				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10005	Khanh10005				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10006	Khanh10006				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10007	Khanh10007				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10008	Khanh10008				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10009	Khanh10009				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10010	Khanh10010				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10011	Khanh10011				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10012	Khanh10012				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10013	Khanh10013				Beijing	jdsu_demo1	jdsu	demo1
<input type="checkbox"/>	Khanh10014	Khanh10014				Beijing	jdsu_demo1	jdsu	demo1

Viewing 2005 record(s) Page Size 15 Page 1 of 134

Back Next Cancel

**UPDATE FIRMWARE - Confirm selections**

You are updating this firmware for 1 asset(s)?

Package Name 3.7105  
Version 3.7105  
Language


Press Yes button to proceed

Back Yes Cancel



## Downloading to a USB flash drive

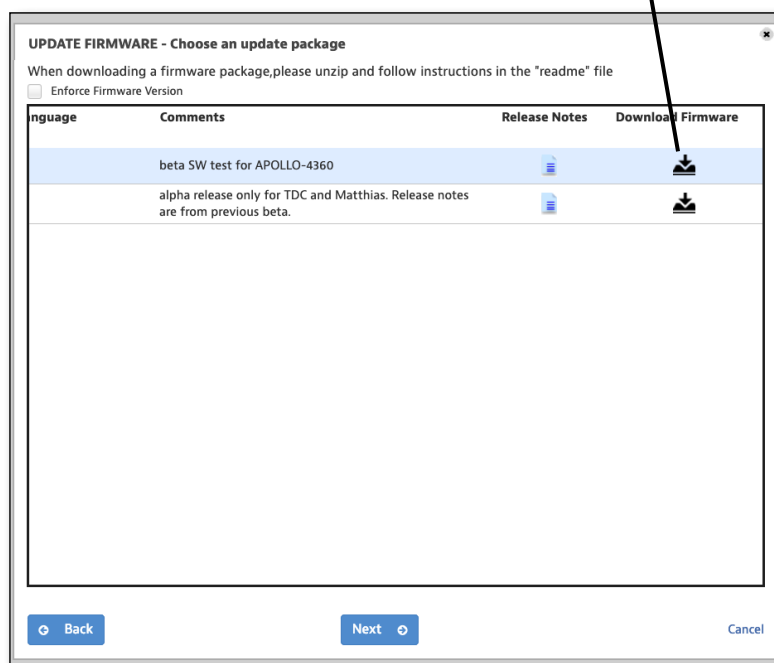
For instruments that support updating the firmware via USB, you can also download packages to your PC. This method is not recommended.

1. From the Update Packages screen, scroll to the right to show release notes and download firmware options.
2. Click the download button  for the firmware you want to download, then choose where you want to save the file.

Remember when downloading firmware packages to unzip the file and follow instructions in the Read Me file.

3. Follow the instructions to save the firmware to your USB flash drive.
4. Then follow the instrument's firmware installation instructions to update.

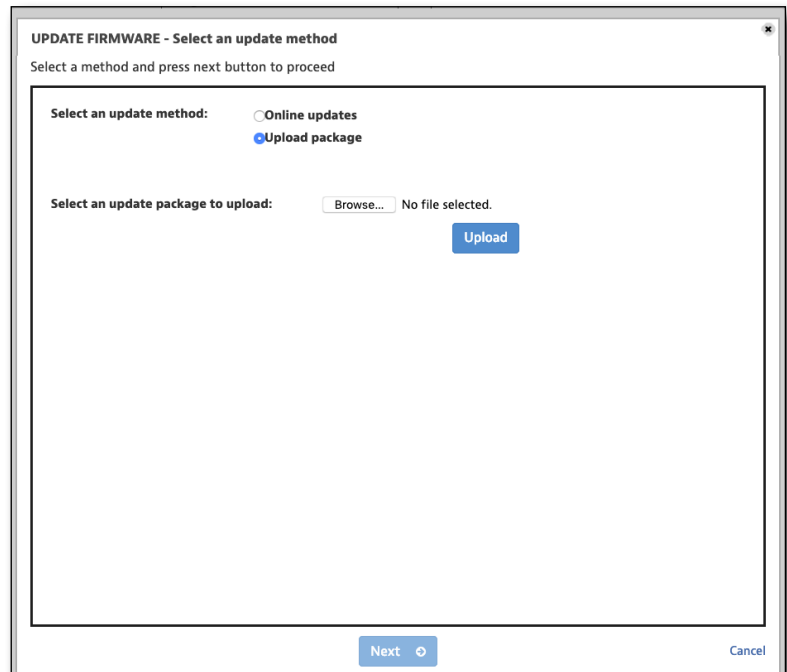
**Download firmware**



## Uploading packages

This feature allows you to upload your own packages for beta testing. This isn't recommended, as the online updates will always have the latest version.

1. Select **Upload packages** as the update method.
2. Select **Browse** and choose the file you want to upload, then select **Upload**. A confirmation screen appears.
3. Click **Yes** to confirm. The firmware package will then be available to assign to your assets.



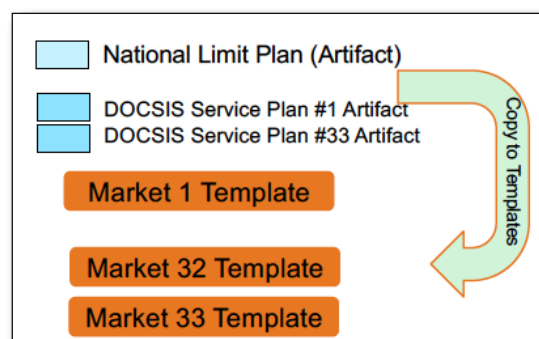
## Managing configuration templates

This feature allows you to manage your configuration templates and assign to your assets. Templates organize and contain multiple testing and configuration settings, called *artifacts*, and are an easy way to standardize compliance testing and maintenance configurations deployed to individual meters, whole customer markets, or your entire enterprise.

Select the **Assets** tab, then select **Manage Templates**, and finally your asset type. The Manage Templates screen appears, as shown below.

On the left, you will see the **Global Archives**, the repository for all the artifacts to build configuration templates for your assets (e.g. Limit plans, DOCSIS service plans, etc.).

Artifacts are specific to instrument type, e.g. ONX artifacts are separate from those for NSCs. An artifact only includes one aspect of a configuration (e.g. one artifact can't have a limit plan and off-air ingress plan associated to it). Several artifacts can then be added to a configuration template and deployed to your instruments.



Individual artifacts can be deployed to your instruments, as well, but is not recommended.

**Note:** This feature is dependent on the instrument and may not be available for all products.

For more detailed information on templates and best practices, contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com).

*Global Archives*

*New Template*

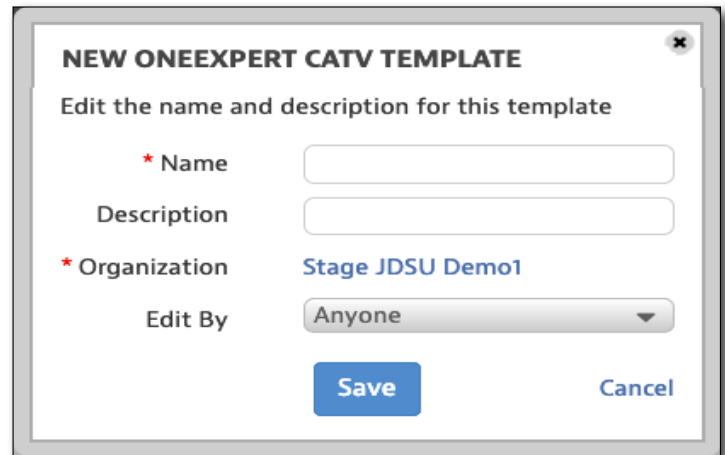
Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modi
<input type="checkbox"/> lqg_a1		0	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	10/19/2016 05...	qinqin.liu@viavisolutions...	07/19/2018 08...	jdsu.d
<input type="checkbox"/> Khanh East Region LP	East Region LP	1	East Region	Stage JDSU Demo1.Eas...	Anyone	07/19/2018 15...	jdsu.demo1@jdsu.com	07/19/2018 15...	jdsu.d
<input type="checkbox"/> Beijing	Beijing	928	Beijing	Stage JDSU Demo1.Beij...	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/20/2018 14...	jdsu.d
<input type="checkbox"/> Khanh Top Level	Top Level	1	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/19/2018 21...	jdsu.d
<input type="checkbox"/> East Lower 1	East Lower 1	1	East Reg 1 SubReg1	Stage JDSU Demo1.Eas...	Anyone	07/20/2018 17...	jdsu.demo1@jdsu.com	07/20/2018 17...	jdsu.d
<input type="checkbox"/> Beijing Update Test	Beijing Update Test	2,001	Beijing	Stage JDSU Demo1.Beij...	Anyone	08/02/2018 08...	jdsu.demo1@jdsu.com	08/03/2018 08...	jdsu.d
<input type="checkbox"/> lpttest	lpttest	0	apitest	Stage JDSU Demo1.apit...	Anyone	08/02/2018 09...	ted.robinson@stage.de...	08/07/2018 09...	ted.rot
<input type="checkbox"/> Tdmk2	Tdmk2	0	TDMarket1	Stage JDSU Demo1.apit...	Anyone	08/03/2018 14...	ted.robinson@stage.de...	08/03/2018 14...	ted.rot

## Adding new configuration templates

Select the **New Template** button at the top right side of the screen. The Create Template screen is displayed.

Enter the information as needed, including adding a name, description, organization, and who should be able to edit, and click **Save**.

The new configuration template will appear in the list.



**NEW ONEEXPERT CATV TEMPLATE**

Edit the name and description for this template

\* Name

Description

\* Organization **Stage JDSU Demo1**

Edit By **Anyone**

**Save** **Cancel**

Depending on the instrument type, configuration files are organized into single or multiple sections (Channel Plan, Limit Plan, etc). Select a category to show just show that type of configuration.

Also, you can right-click a configuration file for more options, including:

- **View**
- **Edit\***
- **Rename\***
- **Deploy** – Deploy this configuration to another unit
- **Archive** – Save this configuration to the Global Archive for all users
- **Copy to template**
- **Export**
- **Delete\***



**NOTE:**

***For Edit, Rename, and Delete, changes will be applied to the instrument on the next sync. This also removes this instrument from its template.***

## Editing configuration template artifacts

If you have the appropriate permissions, you can edit template artifacts.

Double click the asset you want to edit (or right-click and select **View** from the dropdown). The Configuration Artifacts screen is displayed.

Under the **Template Sections** area on the left, you will see all of the available sections you can add to your template.

On the right, the **Configuration Artifacts** area shows the artifacts you currently have assigned to this template.

The screenshot displays the 'Configuration Artifacts' interface for the 'Khanh East Region LP' template. On the left, the 'Template Sections' list includes: Limit Plan (Match), DOCSIS Service Plan (Ignore), Off-Air Ingress Plan (Ignore), Measurement Settings (Ignore), Limit Plan Exclusion Zones (Ignore), Global Sweep Configurations (Ignore), Sweep Alignment Plan (Ignore), Test Point Templates (Ignore), Tilt Settings (Ignore), Digital Measurement Settings (Ignore), Ingress Span (Ignore), Auto Purge Settings (Ignore), Channel Plan Template (Ignore), Throughput URL Settings (Ignore), and Lastconfigs (Ignore). The main area shows a table of artifacts with the following data:

Name	Path	Created On	Created By	Modified On	Modified By	Linked Artifact Count
Khanh East Region LP.json	/cust/stratasync/config/limits/K...	07/19/2018 15:35	jdsu.demo1@dju.com	07/19/2018 15:35	jdsu.demo1@dju.com	0

### Editing template artifacts

## Changing the deployment policy

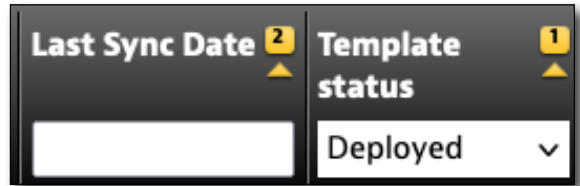
To change the deployment policy for each configuration, select the dropdown next to each one.

- **Ignore** – Ignore the config artifacts in this section when the template is deployed
- **Match** – Deploy the config artifacts in this section to the asset and delete similar artifacts
- **Add** – Deploy the config artifacts in this section to the asset, replacing similar-named artifacts only

The close-up shows the 'Template Sections' dropdown menu for the 'Channel Plan' section. The menu is open, displaying the following options: '+ Add', 'Ignore', 'Match', and '+ Add'.

## Sorting by configuration template status

Select the **Template status** column and choose the status from the dropdown to sort.



- **None** – No current status
- **Pending** – Template is pending to be deployed to the asset
- **Deployed** –Template has been deployed to the asset
- **Asset Newer** – The instrument user modified the template on the asset after the server template version was created.

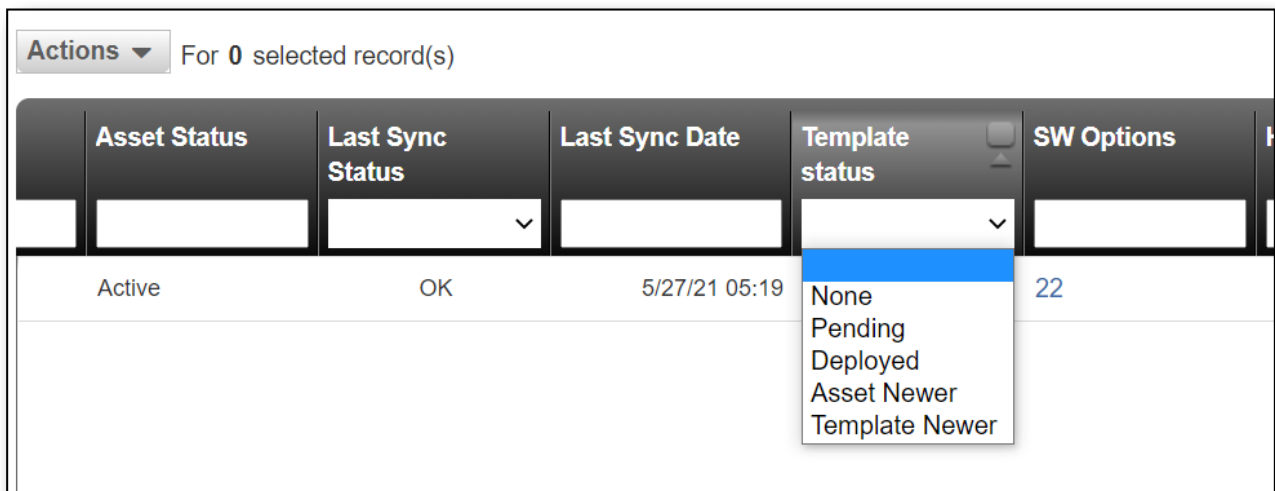
The template on the instrument is different than the template created on StrataSync and the template on the instrument was created after the template on StrataSync.

- **Template Newer** – The template on the instrument is older than the template on the server.

A new template was created on StrataSync, or an existing template was modified on StrataSync, but the new (or modified) template was not deployed to the instrument. Thus the template on the meter does not match the template on StrataSync and the template on StrataSync is newer.

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.



Sorting by template status

## Editing configuration template details

From the Configuration Artifacts screen of the template, select **Edit** at the top of the **Template Sections** area (next to the template name). The Edit Template Details screen is displayed.

Edit

Manage Templates > Khanh East Region LP  
 Organization: East Region

**Template Sections**

- Limit Plan Match
- DOCSIS Service Plan Ignore
- Off-Air Ingress Plan Ignore
- Measurement Settings Ignore
- Limit Plan Exclusion Zones Ignore
- Global Sweep Configurations Ignore
- Sweep Alignment Plan Ignore
- Test Point Templates Ignore
- Tilt Settings Ignore
- Digital Measurement Settings Ignore
- Ingress Span Ignore
- Auto Purge Settings Ignore
- Channel Plan Template Ignore
- Throughput URL Settings Ignore
- Lastconfigs Ignore

**Configuration Artifacts**

Limit Plan Global Archive New Limit Plan

Name	Path	Created On	Created By	Modified On	Modified By	Linked Artifact Count
Khanh East Region LP.json	/cus/stratasync/config/limits/K...	07/19/2018 15:35	jdsu.demo1@dju.com	07/19/2018 15:35	jdsu.demo1@dju.com	0

View Assets(0) Deploy Template

Edit the information as needed, and click **Save**.

**NEW ONEEXPERT CATV TEMPLATE**

Edit the name and description for this template

\* Name

Description

\* Organization East Region

Edit By

## Edit By

If you have the appropriate permissions, you can lock templates from being edited by other users.

The options are:

- **Pick User(s)** – Allows editing by specific users. Select the user(s) to allow editing for the template. Note the template creator is automatically added to the **Edit By** list.

Additional user(s) are selected by typing in the “Search and pick user..” dialog box.

Deployment policy options are also disabled for all other users.

- **Anyone** – Allows editing by any user with the visibility to the template

When done, click **Save**.

The **Edit Lock** column of the Manage Templates screen shows the username of the person that has locked the template, or **Anyone**, if unlocked.

*Edit Lock column*

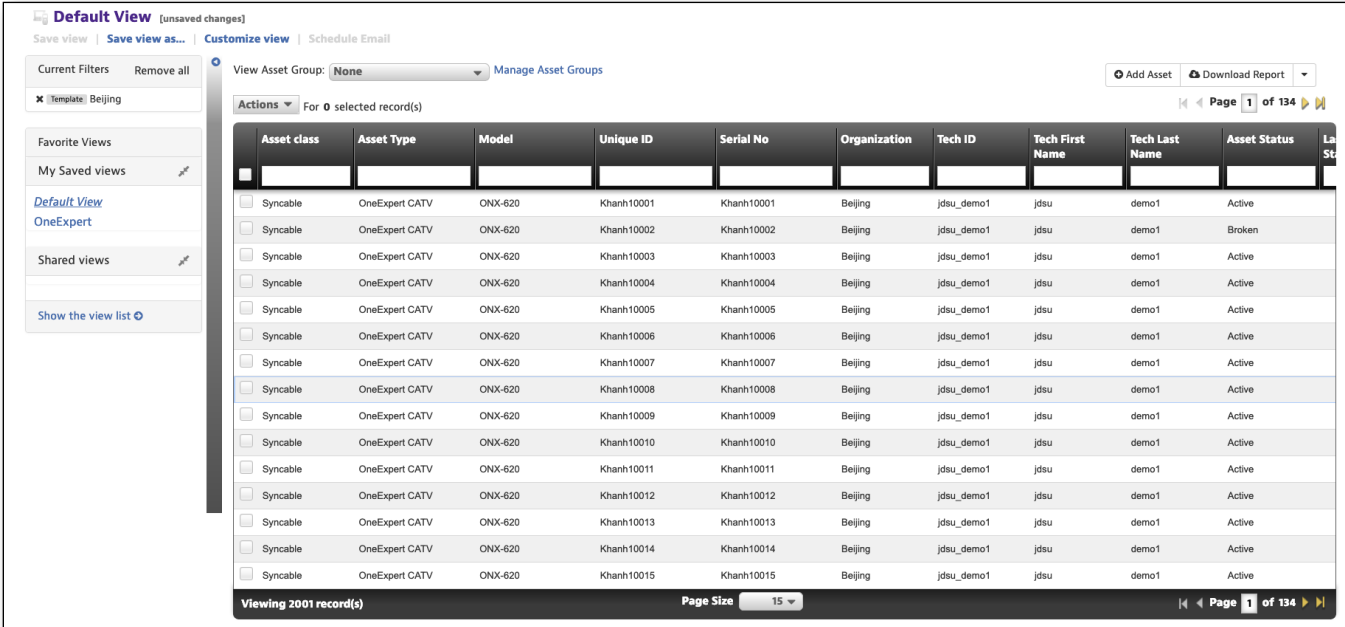
Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modi
lqq_a1		0	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	10/19/2016 05...	qinglin.liu@vialisolutions...	07/19/2018 08...	jdsu.d
Khanh East Region LP	East Region LP	1	East Region	Stage JDSU Demo1.Eas...	Anyone	07/19/2018 15...	jdsu.demo1@jdsu.com	07/19/2018 15...	jdsu.d
Beijing	Beijing	928	Beijing	Stage JDSU Demo1.Beij...	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/20/2018 14...	jdsu.d
Khanh Top Level	Top Level	1	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/19/2018 21...	jdsu.d
East Lower 1	East Lower 1	1	East Reg1 SubReg1	Stage JDSU Demo1.Eas...	Anyone	07/20/2018 17...	jdsu.demo1@jdsu.com	07/20/2018 17...	jdsu.d
Beijing Update Test	Beijing Update Test	2,001	Beijing	Stage JDSU Demo1.Beij...	Anyone	08/02/2018 08...	jdsu.demo1@jdsu.com	08/03/2018 08...	jdsu.d
tpitest	tpitest	0	apitest	Stage JDSU Demo1.apit...	Anyone	08/02/2018 09...	ted.robinson@stage.de...	08/07/2018 09...	ted.ro
Tdmk2	Tdmk2	0	TMarket1	Stage JDSU Demo1.apit...	Anyone	08/03/2018 14...	ted.robinson@stage.de...	08/03/2018 14...	ted.ro



## Viewing associated assets

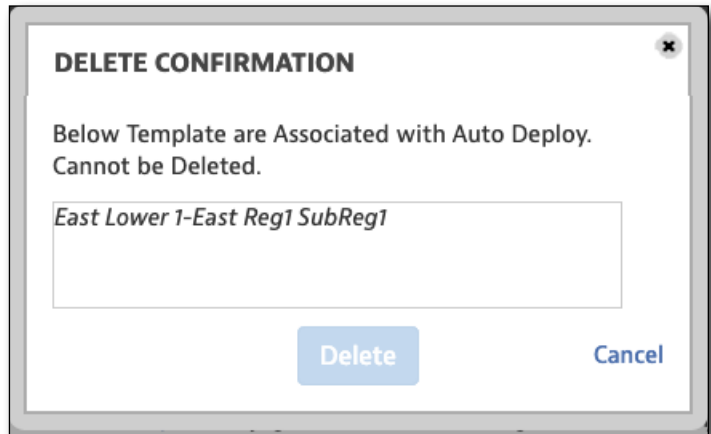
To see what assets are associated to a template, right-click the template on any menu and select **View Associated Assets** from the dropdown (or use the **Actions** dropdown). The Associated Assets screen is displayed.

You can also click the asset number to view the assets, as well.



## Deleting configuration templates

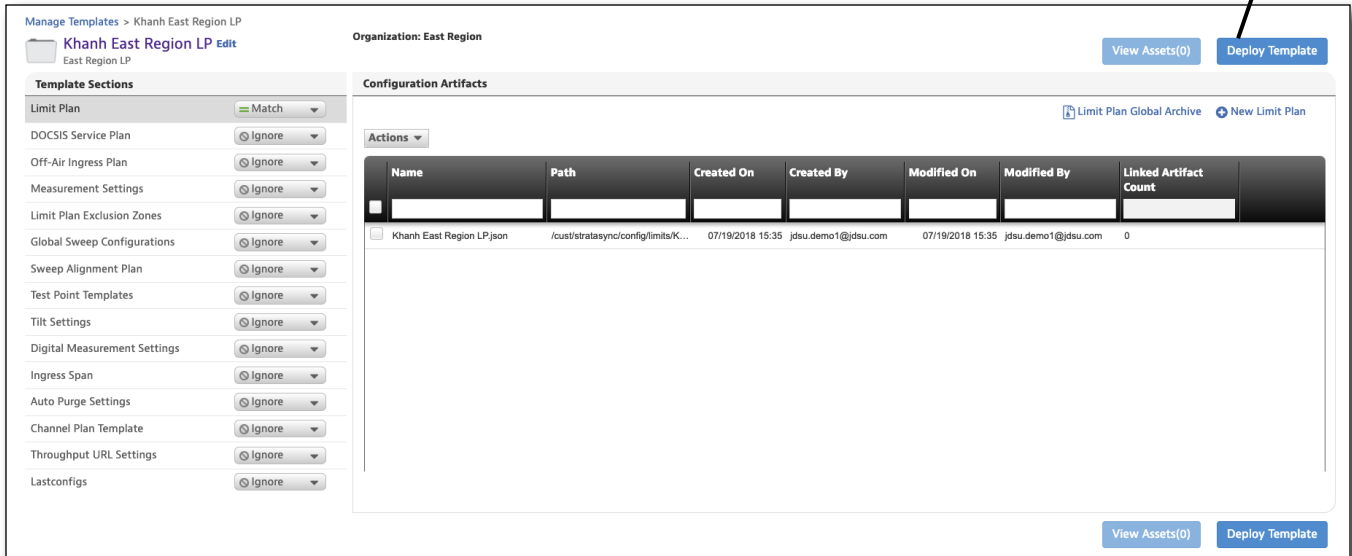
Select the template you want to delete, then right-click and choose **Delete** (or use the **Actions** dropdown). A confirmation screen asks you to confirm. Click **Delete**.



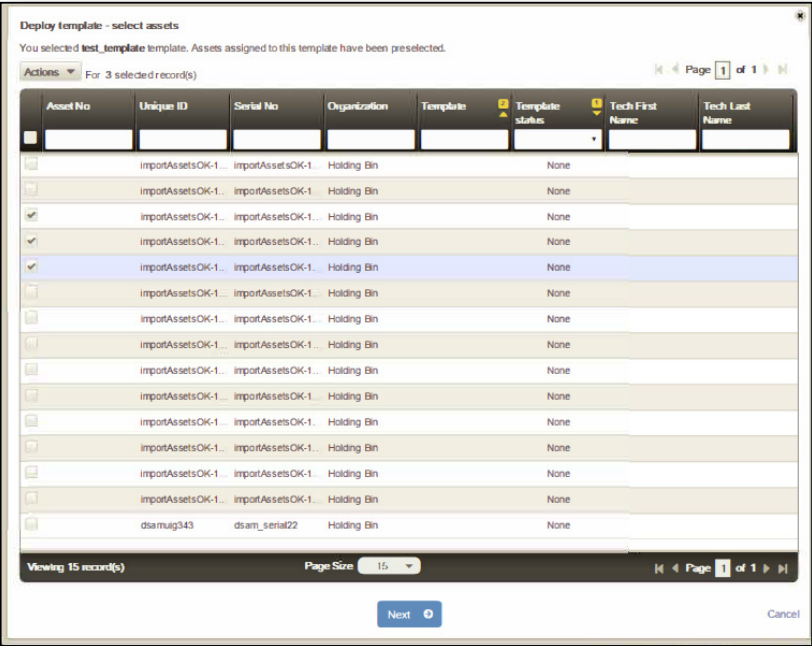
## Deploying configuration templates

To deploy a configuration template, right-click the template on any menu and select **Deploy** from the dropdown (or from the Configuration Assets screen, click the **Deploy Template** button in the upper right). The Deploy Select Assets screen is displayed.

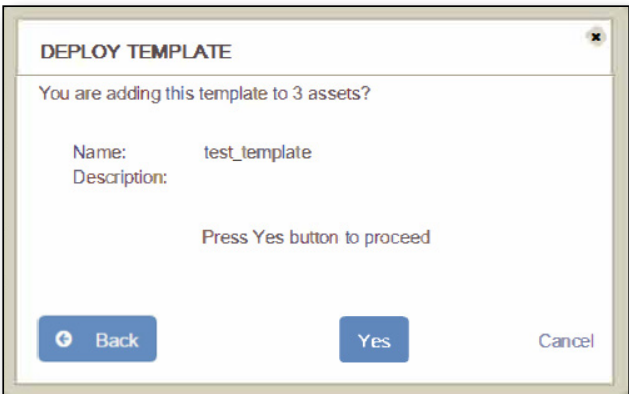
*Deploy Template*



Select the assets where you want to deploy the selected template. When done, click **Next**.



A confirmation screen will ask if you want to deploy the template. Click **Yes** to confirm. The template will be deployed to the assets on the next sync.



### Auto deploy settings

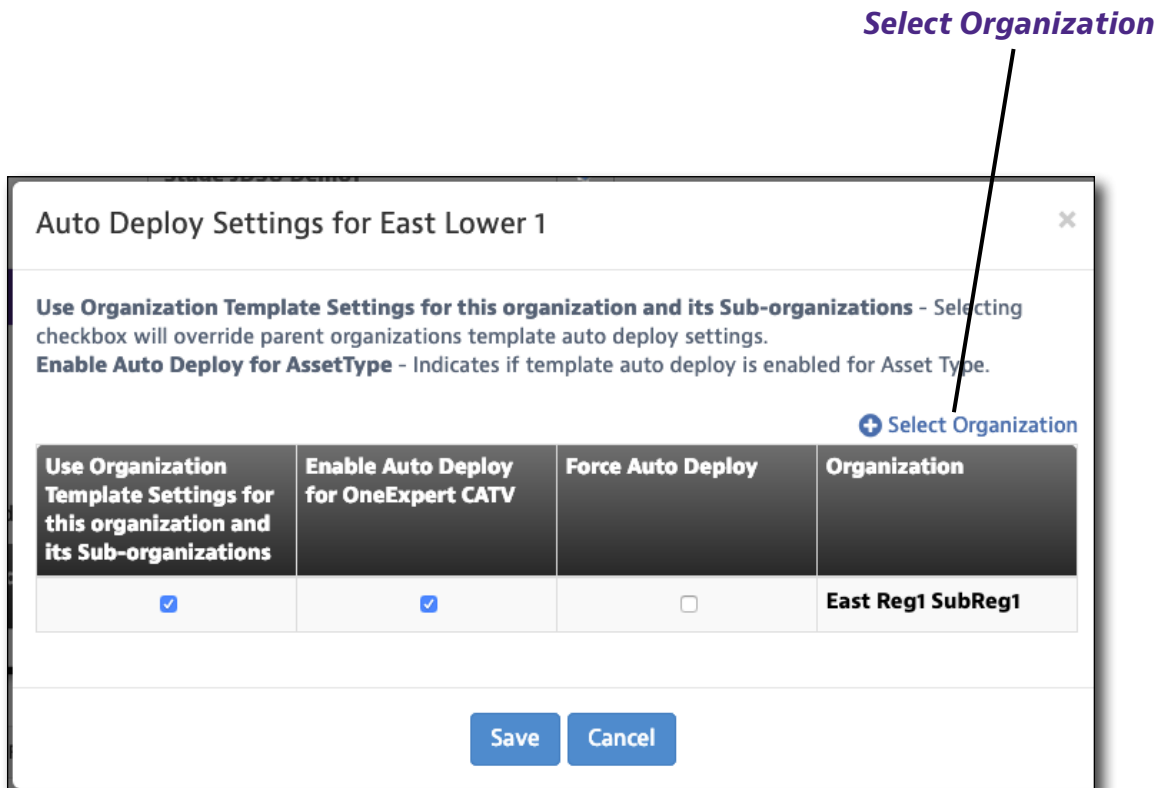
You can set up auto deploy settings for any configuration template. Right-click the template on any menu and select **Auto Deploy Settings** from the dropdown (or use the **Actions** menu). The Auto Deploy Settings screen is displayed.

The options are:

- **Use Organization Template Settings for this organization and its Sub-organizations** – Allows you to override the parent organization's template auto deploy settings
- **Enable Auto Deploy for AssetType** – Allows you to set whether auto deploy is enabled for the selected asset type
- **Force Auto Deploy** – You can “force” StrataSync to deploy the template to all applicable assets associated with the auto deploy settings, regardless of the asset’s current Template Status. This is a “one time” action initiated when the box is checked and **Save** is selected.

Click **Select Organization** at the top to add more organizations, as needed.

When done, click **Save**.

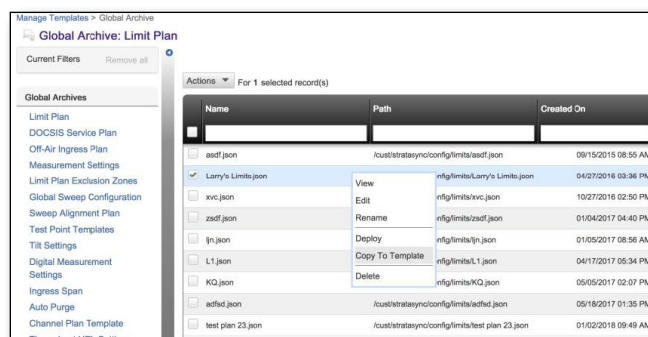


## Artifact linking

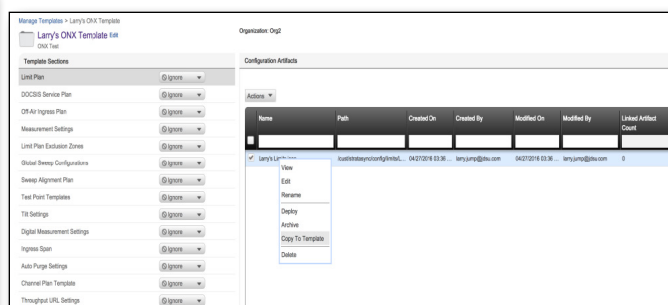
Artifact linking provides synchronization between parent and child configuration artifacts. Changes made to the parent configuration artifact will be propagated to the child configuration artifact.

An artifact link is established when you select **Copy To Template** from the **Actions** menu of configuration artifact. The artifact you are copying from will be the parent and the artifact that is created in the template will become the child.

**Note:** This feature is dependent on the instrument and may not be available for all products.



Linking from a Global Archive artifact



Linking from a template artifact

### ***Actions that update linked artifacts***

The artifact linking capability is enabled in **System Settings > Template Settings > Enable Configuration Artifact Link from Global Archive or Templates**.

See "[Template settings](#)" on page 209.

The following actions will update an artifact link:

#### **Rename actions**

- Renaming of a Global Archive or template artifact will update all linked artifacts in templates
- Renaming of a Global Archive channel plan (eg.: "N1" to "N2") which is linked to template T1 that already has channel plan N2 before renaming will delete oldest channel plan N2

#### **Example:**

- Consider Global Archive channel plan is N1
- Consider template T1 has channel plan N2
- Using copy to template, copy Global Archive channel plan "N1" to "T1"
- Now template T1 has two channel plans N1 and N2 where N1 is linked to Global Archive N1
- Rename Global Archive channel plan "N1" to "N2"
- Template T1 will have its linked channel plan "N1" renamed to "N2"
- Template T1 has two channels plans named "N2"
- The old N2 will be deleted

#### **Edit actions**

- Edit of Global Archive or template artifact will update all linked artifacts in templates

#### **Delete actions**

- Template used for auto deploy cannot be deleted
- Deleting a Global Archive artifact deletes template artifacts linked to it from templates
  - All template artifacts that are linked to deleted template artifacts will also be deleted
  - The artifacts will also be deleted from assets if following are true
    - Template section status is "match"
    - Asset will remain associated to template
- Deleting a template artifact deletes template artifacts linked to it
  - Template will be auto-deployed again

***Breaking links between configuration artifacts***

If any changes are made to a child artifact, the established link between the parent artifact and child artifact is disconnected. Once the link is broken, changes to the parent artifact are not applied to prior linked child artifacts.

To re-enable the link, select ***Copy To Template*** on the parent artifact and copy to the respective template.

***Disabling and re-enabling artifact linking***

If artifact linking is disabled, then modifications to the parent artifact will not update linked artifacts in templates.

If a link is disabled after it is enabled, links are still maintained, however modifications to parent artifact will not update linked artifacts in templates.

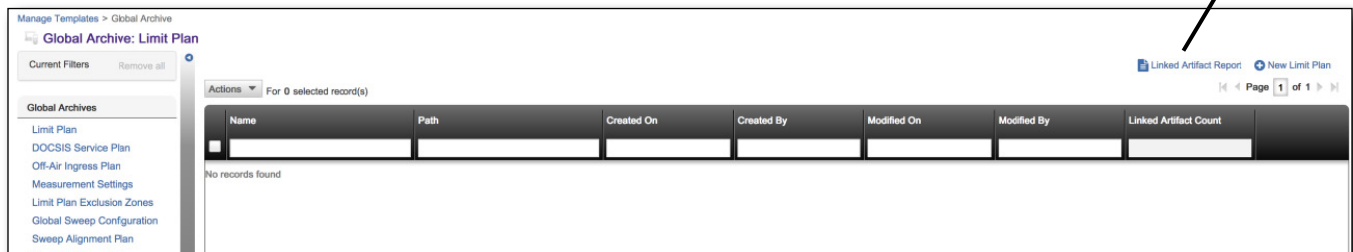
If disabled links are re-enabled, artifacts will be re-synced to all artifacts with linked artifacts and templates will be deployed based on current auto deploy settings.

## Reporting

### Reporting templates linked to Global Archive artifacts

1. Navigate to **Assets Tab > Manage Templates** and select an asset type.
2. Select any section under "Global Archive".
3. Select **Linked Artifact Report** to view the report which opens in a separate tab.  
The report lists all archive artifacts that are linked by templates per asset type.

**Linked Artifact Report**



Linked Archive Artifact Report				
Configuration Name	Configuration Type	Asset Type	Template	Template Org Path
DOCSIS-ga-rn.oxs	DOCSIS Service Plan	OneExpert CATV	NorthRegion	JDSU
DOCSIS-ga-rn.oxs	DOCSIS Service Plan	OneExpert CATV	R2	JDSU.KQ Org



## Reporting templates linked to template configuration artifacts from other templates

1. Navigate to **Assets Tab > Manage Templates** and select an asset type.
2. Select **Linked Artifact Report** to view the report which opens in a separate tab.

The report lists all template configuration artifacts along with template names that are linked by other templates per asset type.

**Linked Artifact Report**

Manage Templates: OneExpert CATV change

Current Filters Remove all

Global Archives

- Limit Plan
- DCCSIS Service Plan
- Off-Air Ingress Plan
- Measurement Settings
- Limit Plan Exclusion Zones
- Global Sweep Configuration
- Sweep Alignment Plan

Actions For 0 selected record(s)

Auto Deploy Report **Linked Artifact Report** New Template

Page 1 of 1

Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modified By
<input type="checkbox"/> NorthRegion		1	JDSU	JDSU	Anyone	2018/03/07 11:...	jdsu@jdsu.com	2018/08/28 10:...	jdsu@jdsu.com
<input type="checkbox"/> R2		0	KQ Org	JDSU.KQ Org	Anyone	2018/03/07 11:...	jdsu@jdsu.com	2018/08/28 10:...	jdsu@jdsu.com
<input type="checkbox"/> 76588Link		1	JDSU	JDSU	Anyone	2018/07/27 2:...	jdsu@jdsu.com	2018/07/27 3:...	jdsu@jdsu.com

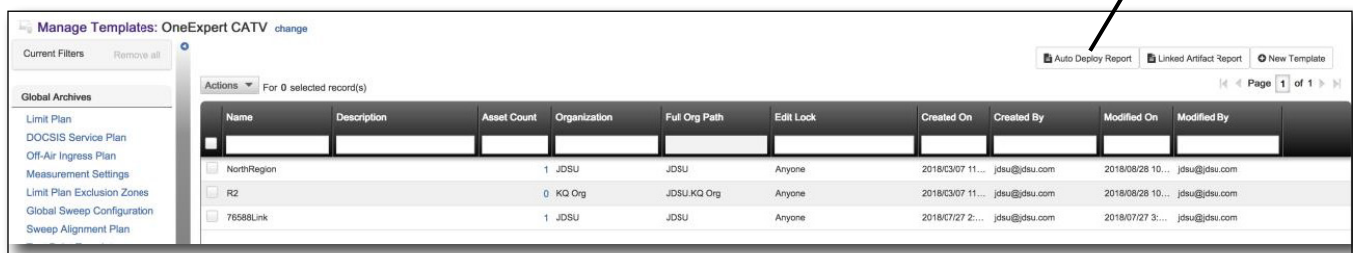
### Linked Template Artifact Report

Configuration Name	Configuration Type	Asset Type	Source Template	Source Template Org Path	Destination Template	Destination Template Org Path
AI's Limit Plan.json	Limit Plan	OneExpert CATV	NorthRegion	JDSU	76588Link	JDSU

### Reporting auto deploy settings for all enabled organizations

1. Navigate to **Assets Tab > Manage Templates** and select an asset type.
2. Select **Auto Deploy Report** to view the report which opens in a separate tab.  
The report lists all auto deploy settings for all organizations.

**Auto Deploy Report**



### Template Auto Deploy Organization Report

OrgName	OverrideAutoDeploy	AssetType	EnabledForAssetType	Template	TemplateOrg	TemplateOrgFullPath	OrgFullPath
JDSU	true	DSAM	true	Abc Template	JDSU	JDSU	JDSU
Onx	true	DSAM	true	Abc Template	JDSU	JDSU	JDSU.Onx

## Managing asset options

As covered briefly earlier in this chapter, this feature allows you to manage your software options and assign to your assets.

Select the **Assets** tab, then select **Manage Asset Options**. The Manage Software Options screen appears.

The screenshot displays the 'Manage Software Options' interface. On the left, there is a sidebar with 'Current Filters' (Remove all), 'Favorite Views' (My Saved views, Default View, Shared views, Show the view list), and 'Actions'. The main area features a table with the following columns: License Type, Catalog Number, Description, Organization Name, Full Org Path, Asset Type, Expiration Date, Total Quantity, Available, Assigned, Orders, and Duration. The table contains 18 rows of data. At the bottom, it shows 'Viewing 257 record(s)', 'Page Size' set to 15, and 'Page 1 of 18'.

License Type	Catalog Number	Description	Organization Name	Full Org Path	Asset Type	Expiration Date	Total Quantity	Available	Assigned	Orders	Duration
Permanent	C510M1GE-U1	10/100/1000M Electrical ...	Stage JDSU Demo1	Stage JDSU Demo1	SmartClass 4800, ...		100	97	3	1	
Permanent	C510GELAN-U1	10GigE LAN Ethernet	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		100	99	1	1	
Permanent	C510GEWAN-U1	10GigE WAN Ethernet	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		90	89	1	1	
Permanent	C510GLAYER4-U1	10GigE L4 TCP/UDP	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		100	98	2	1	
Permanent	C510GESYNCE-U1	10GigE Optical Sync-E	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		100	99	1	1	
Permanent	C510GCAPTURE-U1	10GigE Packet Capture	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		100	99	1	1	
Floating	CEDUALPORT-FL	Dual Port (Floating)	Stage JDSU Demo1	Stage JDSU Demo1	T-BERD/MTS 5800...		100	100	0	1	
Permanent	HST3000S-MOS-U1	Field Upgrade: MOS(Me...	Stage JDSU Demo1	Stage JDSU Demo1	HST-3000		225	220	5	2	
Permanent	HST3000-SCRIPT	Scripted Test Option,HS...	Stage JDSU Demo1	Stage JDSU Demo1	HST-3000		225	223	2	2	
Permanent	HST3000S-VMOS	VMOS/Video Mean Opin...	Stage JDSU Demo1	Stage JDSU Demo1	HST-3000		205	202	3	2	
Floating	E5643B-960	TrueSite Pro Floating So...	Stage JDSU Demo1	Stage JDSU Demo1	TrueSite		155	155	0	2	
Floating	E5643B-962	TrueSite Indoor Test Ma...	Stage JDSU Demo1	Stage JDSU Demo1	TrueSite		155	155	0	2	
Floating	E5643B-963	TrueSite Indoor Fault De...	Stage JDSU Demo1	Stage JDSU Demo1	TrueSite		155	155	0	2	
Floating	E5643B-964	TrueSite Receiver Meas...	Stage JDSU Demo1	Stage JDSU Demo1	TrueSite		255	255	0	2	
Floating	E5643B-961	TrueSite Lite Floating So...	Stage JDSU Demo1	Stage JDSU Demo1	TrueSite		255	255	0	2	

## Assigning an option

To assign a software option to an asset, right-click the option and select **Assign** from the dropdown (or use the **Actions** dropdown). The Manage Permanent Option Pool screen is displayed. This is a quick way to assign an option to a few or even multiple assets.

Select the **Assign** checkboxes on the left for the assets you want to apply the software option, then select **Deploy** from the **Actions** dropdown.

### Assign column

The screenshot shows the 'MANAGE PERMANENT OPTION POOL' interface for catalog C510GELAN-U1. It features a table with columns: Assign, Asset Type, Serial No, Unique ID, Tech ID, Tech FullName, Parent Type, Parent Serial No, Quant..., Status, and Regener... Email. The 'Assign' column contains checkboxes for each asset row. A red arrow points to the 'Assign' column header.

Assign	Asset Type	Serial No	Unique ID	Tech ID	Tech FullName	Parent Type	Parent Serial No	Quant...	Status	Regener... Email
<input type="checkbox"/>	MAP-2100, T-BERD/MTS									
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMME0071450099	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0081450013	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0081450020	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114450030	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114750022	MTS5800V2_WM...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114450026	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114750022	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114750053	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					
<input type="checkbox"/>	T-BERD/MTS 5800 V2	WMMP0114750052	T-BERD5800V2_...	5800 tech	5800 tech_first 5800 tech_last					

A confirmation screen will ask if you want to deploy the option. You can also choose to send an email to the user with challenge codes (not recommended).

Click **Confirm**.

The option will be deployed to the assets on the next sync.

The dialog box is titled 'DEPLOY OPTION - C510GELAN-U1'. It contains the following text: 'You are deploying the option to 3 asset(s).', a checkbox for 'Send an email to tech1@abc.com with challenge code(s)', and a note: 'Note: click on email link to change destination.' Below this, it asks 'Are you sure you want to proceed?' and has 'Confirm' and 'Cancel' buttons.

## Viewing orders

To view all orders for a software option, right-click the option and select **View Orders** from the dropdown (or use the **Actions** dropdown). The License Pool Orders screen is displayed.

Here you can see the individual purchases of software options that make up the selected pool.

Order Number	Date Delivered	Customer ID	Customer Name	PO Number	Contact Name	Line No	Total Quantity
1	01/17/2014	16653523	Stage JDSU Demo1	1	Contact Name	1	90

## Moving an option to another organization

To assign a software option license to another organization or suborg, right-click the option and select **Reallocate** from the dropdown (or use the **Actions** dropdown). The Reallocate to Another Organization screen is displayed.

Enter the number of licenses you want to move and choose the organization to move them to. When done, click **Reallocate**.

**REALLOCATE TO ANOTHER ORGANIZATION**

License Type: PERMANENT

Asset Type: T-BERD/MTS 5800MAP-2100SmartClass

Current Organization: Stage JDSU Demo1

Available Count: 97

\* Move Count: 2

\* Move To Organization: apl2test

Buttons: Reallocate, Cancel

## Importing options

You can import the list of software options as a bundle file and then deploy to your assets.

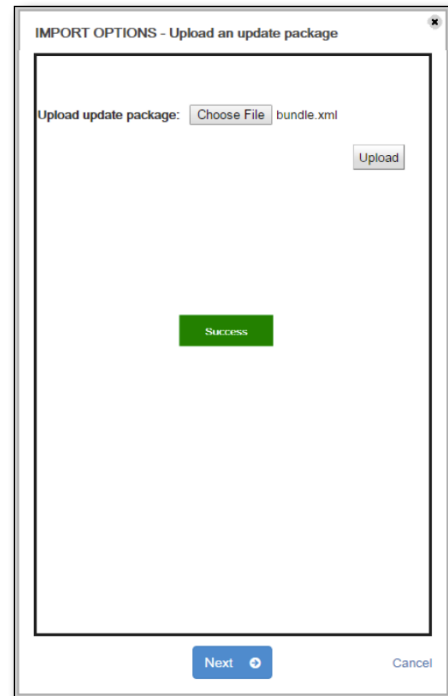
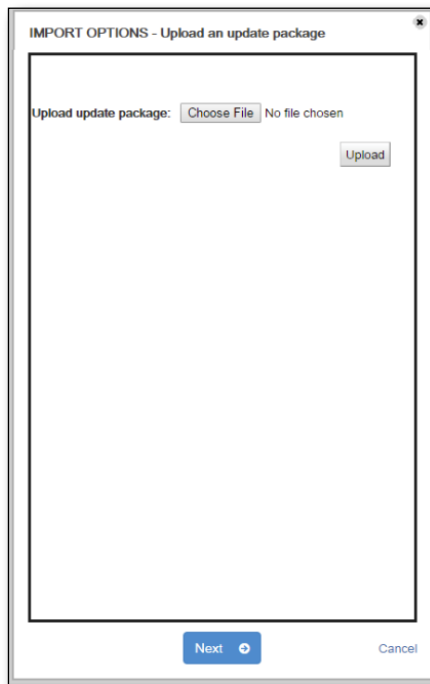
From the Manage Asset Options screen, select **Import Options** at the top right. The Import Options screen is displayed.

**Import Options**

The screenshot displays the 'Import Options' interface. At the top right, a button labeled 'Import Options' is highlighted with a blue arrow. Below this, a table lists various software licenses. The table has the following columns: License Type, Catalog Number, Description, Organization Name, Full Org Path, Asset Type, Expiration Date, Total Quantity, Available, Assigned, Orders, and Duration. The table contains 18 rows of data. The interface also includes a sidebar on the left with 'Current Filters', 'Favorite Views', and 'My Saved views'. At the bottom, it shows 'Viewing 257 record(s)' and 'Page Size 15'.

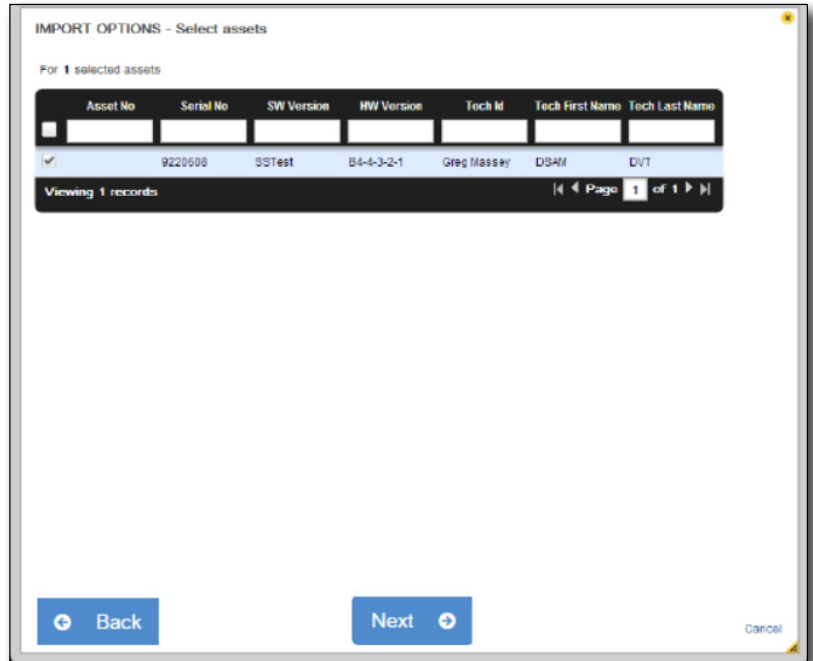
License Type	Catalog Number	Description	Organization Name	Full Org Path	Asset Type	Expiration Date	Total Quantity	Available	Assigned	Orders	Duration
Permanent	C510M1GE-U1	10/100/1000M Electrical ...	Stage_JDSU Demo1	Stage_JDSU Demo1	SmartClass 4600, ...		100	97		3	1
Permanent	C510GELAN-U1	10GigE LAN Ethernet	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		100	99		1	1
Permanent	C510GEWAN-U1	10GigE WAN Ethernet	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		90	89		1	1
Permanent	C510GLAYER4-U1	10GigE L4 TCP/UDP	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		100	98		2	1
Permanent	C510GESYNCE-U1	10GigE Optical Sync-E	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		100	99		1	1
Permanent	C510GCAPTURE-U1	10GigE Packet Capture	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		100	99		1	1
Floating	CEDUALPORT-FL	Dual Port (Floating)	Stage_JDSU Demo1	Stage_JDSU Demo1	T-BERD/MTS 5800...		100	100		0	1
Permanent	HST3000S-MOS-U1	Field Upgrade: MOS(Me...	Stage_JDSU Demo1	Stage_JDSU Demo1	HST-3000		225	220		5	2
Permanent	HST3000-SCRIPT	Scripted Test Option,HS...	Stage_JDSU Demo1	Stage_JDSU Demo1	HST-3000		225	223		2	2
Permanent	HST3000S-VMOS	VMOS/Video Mean Opin...	Stage_JDSU Demo1	Stage_JDSU Demo1	HST-3000		205	202		3	2
Floating	E5643B-960	TrueSite Pro Floating So...	Stage_JDSU Demo1	Stage_JDSU Demo1	TrueSite		155	155		0	2
Floating	E5643B-962	TrueSite Indoor Test Ma...	Stage_JDSU Demo1	Stage_JDSU Demo1	TrueSite		155	155		0	2
Floating	E5643B-963	TrueSite Indoor Fault De...	Stage_JDSU Demo1	Stage_JDSU Demo1	TrueSite		155	155		0	2
Floating	E5643B-964	TrueSite Receiver Meas...	Stage_JDSU Demo1	Stage_JDSU Demo1	TrueSite		255	255		0	2
Floating	E5643B-961	TrueSite Lite Floating So...	Stage_JDSU Demo1	Stage_JDSU Demo1	TrueSite		255	255		0	2

1. Select **Choose File** and find the file you want to upload, then select **Upload**. Success is indicated after uploading. The options package will then be available to assign to your assets.
2. Click **Next**. The Select Assets screen is displayed.



3. Select the assets for the options to be deployed to and click **Next**.

The option will be deployed to the assets on the next sync.





## Managing asset groups

This feature allows you to organize your assets for easy management and deployment.

Select the **Assets** tab, and then select **Assets List**. The Assets List appears.

The screenshot shows the 'Assets List' interface. At the top, there is a 'View Asset Group' dropdown menu currently set to 'None'. Below this is a table of assets with columns: Asset class, Asset Type, Model, Unique ID, Serial No, Organization, Tech ID, Tech First Name, Tech Last Name, Asset Status, and Last St. The table contains 15 rows of asset data. On the left side, there are filters for 'Current Filters' (Beijing) and 'Favorite Views' (Default View, OneExpert). At the bottom, it shows 'Viewing 2001 record(s)' and 'Page Size 15'.

### Viewing asset groups

You can use the **View Asset Group** dropdown to select the asset group you want to filter by. The Asset List shows the list for that group.

The close-up shows the 'View Asset Group' dropdown menu. The current selection is 'None'. The dropdown list includes the following options: None, 5800, CAA, ONT N-Port ZN0103, lqq-group, mygroup1, and mygroup3. Below the dropdown, there is an 'Actions' dropdown and a 'For 1' label.

## Asset group management

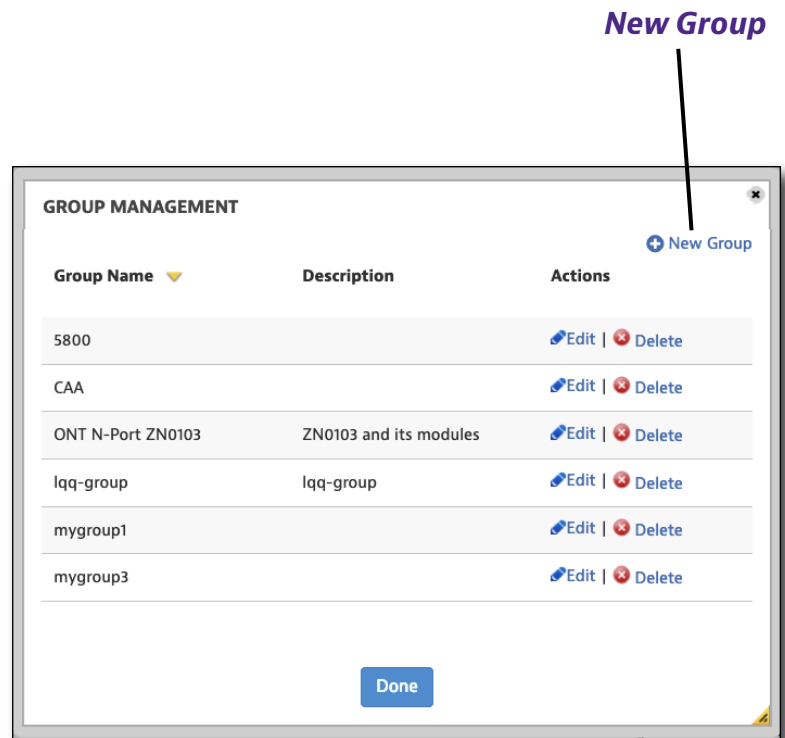
From the Assets List, select **Manage Asset Groups** at the top of the screen. The Group Management screen is displayed.

### Adding new groups

Select **New Group** at the top right side of the screen. The Create A New Group screen is displayed.

Enter a group name and description, and click **Save**.

The new group will appear in the list.

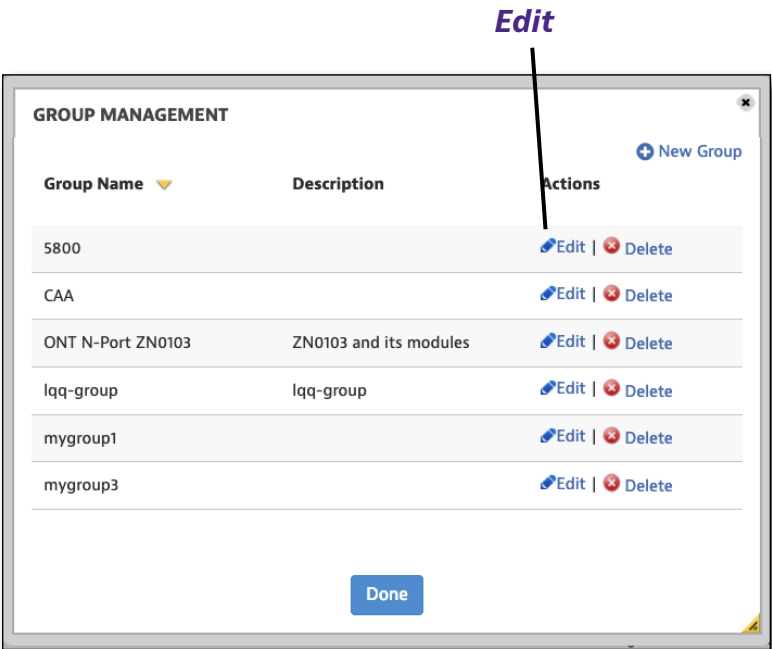


The screenshot shows the 'CREATE A NEW GROUP' dialog box. It has a title bar with a close button. The form contains the following fields and buttons:

- A required field labeled '\* Group name:' with the text 'B Group East' entered.
- A field labeled 'Description:' which is currently empty.
- A blue 'Save' button.
- A 'Cancel' button.

**Editing groups**

Select **Edit** for the group you want to edit. The Edit Group screen is displayed.

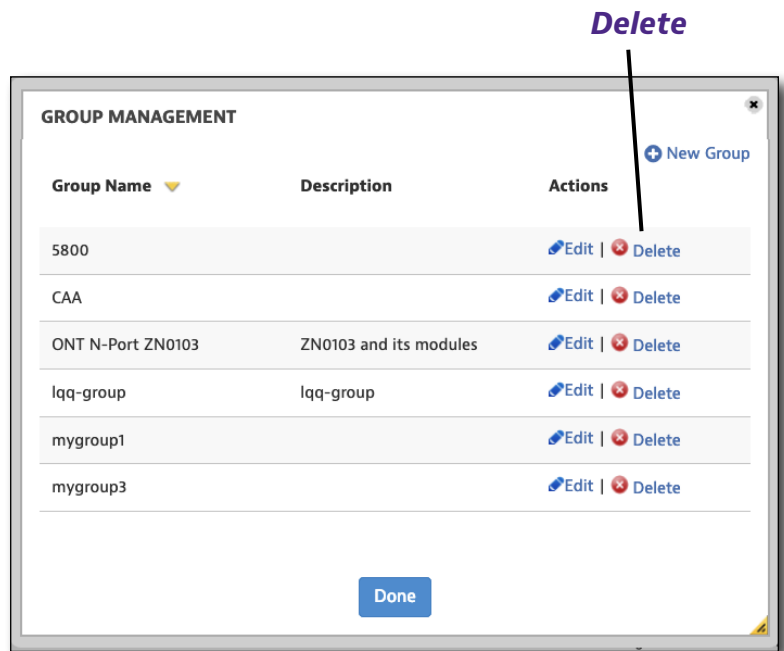


Edit the information as needed, and click **Save**.

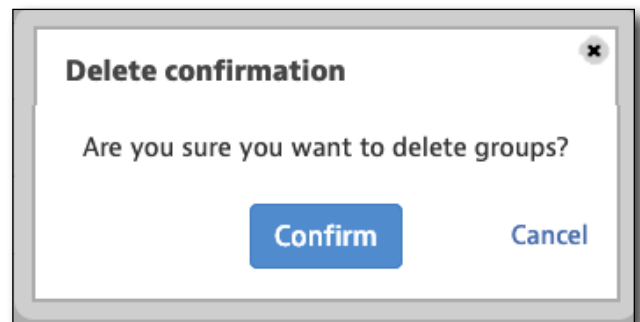


### Deleting groups

Select **Delete** for the group you want to delete.



A confirmation screen asks you to confirm. Click **Confirm**.



## Test Data

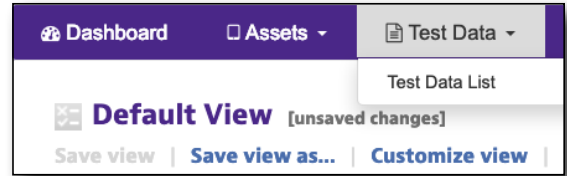
This chapter covers how to use the Test Data Management features of StrataSync, including the following:

- "Test Data" on page 126
- "Searching and sorting" on page 127
- "Views" on page 130
- "Test Data List" on page 133

# Test Data

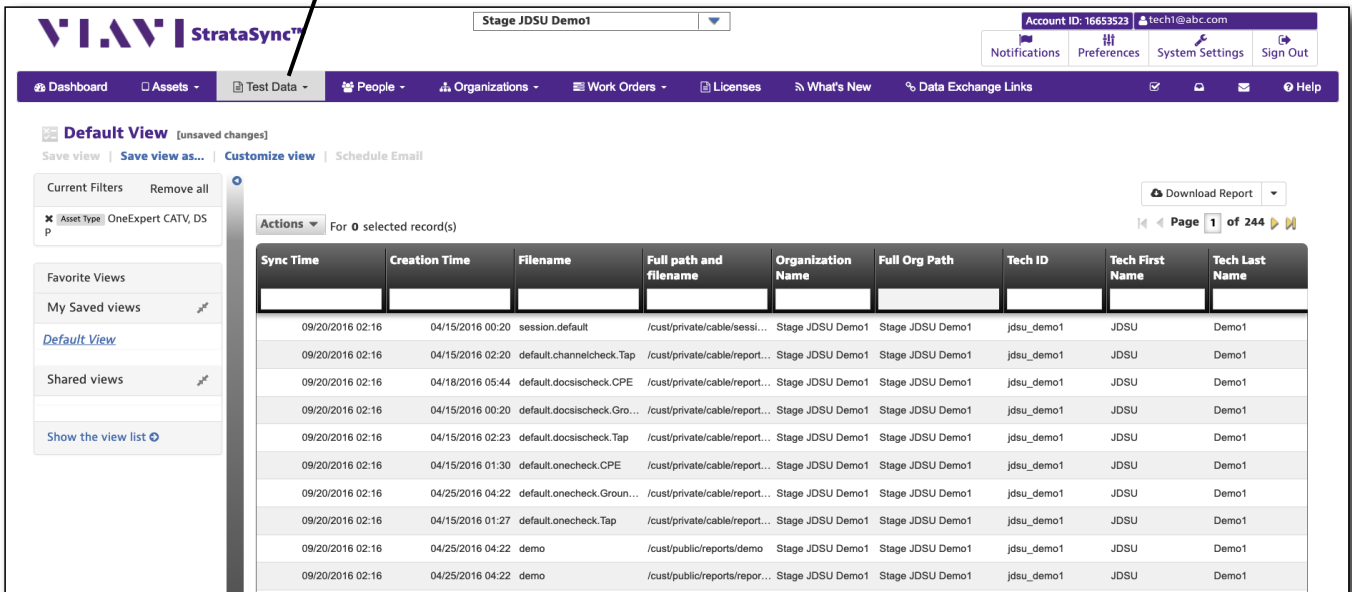
The **Test Data** tab is the hub for all of the test data uploaded from your field instruments to your StrataSync account.

Click the **Test Data** tab in the Main menu to bring up the Test Data dropdown.



**Test Data dropdown menu**

**Test Data tab**



**Test Data List selected from the Test Data tab**

## Searching and sorting

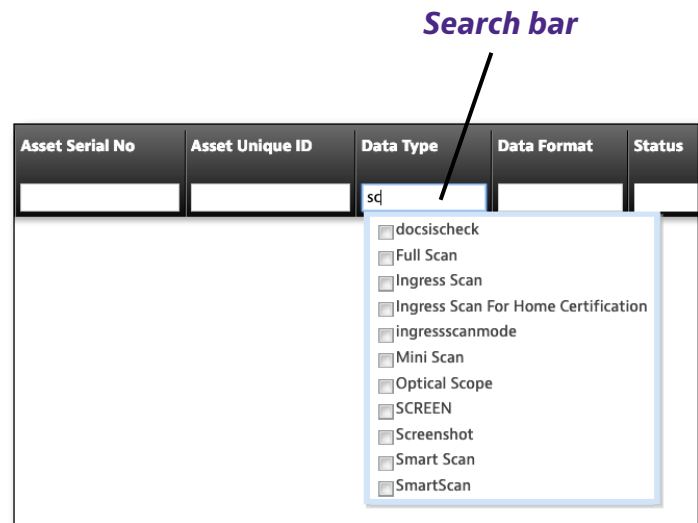
From the Test Data List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

### Searching

You can search by typing into the search bar under a column header. The list updates with the results.

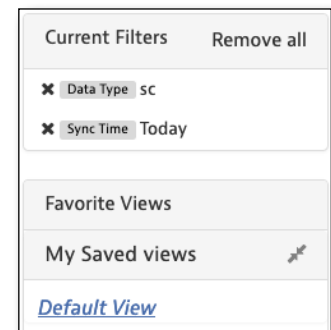
Some of the columns provide dropdowns with relevant options once you start typing.

The available data types are dependent on the selected instruments.



The filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

The **Sync Time** in the Default View is filtered to **Today**, so make sure to clear that in the search bar to see all the test data.



The image shows a table with the following columns: Asset Unique ID, Data Type, Data Format, Status, Sync Time, Creation Time, Filename, Full path and filename, Organization Name, Full Org Path, Tech ID, Tech First Name, and Tech Last Name. The table contains 15 rows of data. The 'Sync Time' column is filtered to 'Today'.

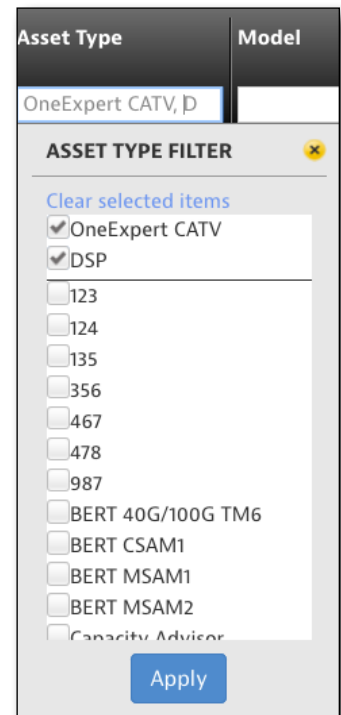
Asset Unique ID	Data Type	Data Format	Status	Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
T-BERD 2000_2805	TESTDATA.OTDR	application/octet-st...	None	10/09/2013 09:45	03/19/2013 11:45	khanih10000002.scr	/useridsku/StrataSyncKh...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.OTDR	application/octet-st...	None	10/09/2013 09:45	07/02/2013 07:21	khanih10000003.scr	/useridsku/StrataSyncKh...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	07/02/2013 07:21	Cable 001_1550.scr.pdf	/useridsku/StrataSyncCa...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	03/19/2013 11:45	khanih10000001.scr.pdf	/useridsku/StrataSyncKh...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	03/19/2013 11:45	khanih10000002.scr.pdf	/useridsku/StrataSyncKh...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	07/02/2013 07:21	khanih10000003.scr.pdf	/useridsku/StrataSyncKh...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA.RFC 2...	text/plain	None	10/09/2013 09:55	09/26/2013 10:31	RFC 2544-2013-09-26T...	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA.RFC 2...	application/pdf	None	10/09/2013 09:55	09/26/2013 10:31	RFC 2544-2013-09-26T...	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	12/04/2012 09:11	khanih01.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/06/2013 04:37	khanih001.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/07/2013 04:50	khanih002.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	01/19/2013 07:03	khanih_20130119-03.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	12/04/2012 09:11	khanih.pdf.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/06/2013 04:37	khanih001.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/07/2013 04:50	khanih002.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khanih_r2	Khanih	Ngo

Scroll to the right to reveal more detail, including Organization name and Tech ID.

### Filtering multiple items

The Asset Type column allows you to select multiple items to filter at the same time (e.g. filter OneExpert and DSP only). When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



#### NOTE:

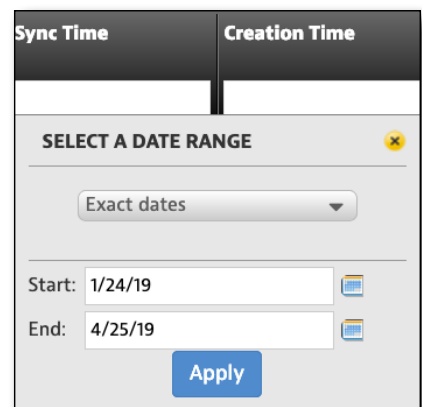


**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Sync Time and Creation Time columns allow you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.





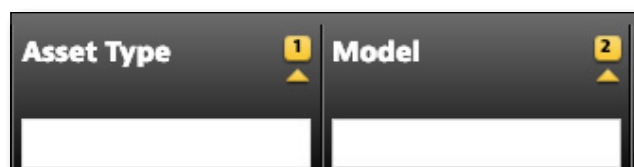
**NOTE:**

**You can save custom filters to a favorite view for easy reference. See ["Saving views" on page 131](#).**

## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

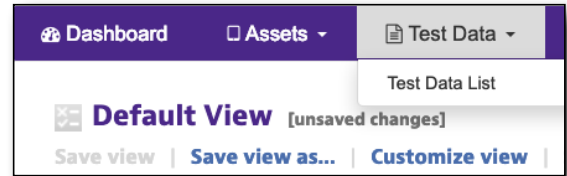


# Views

## Customizing views

StrataSync gives you the ability to customize your list views.

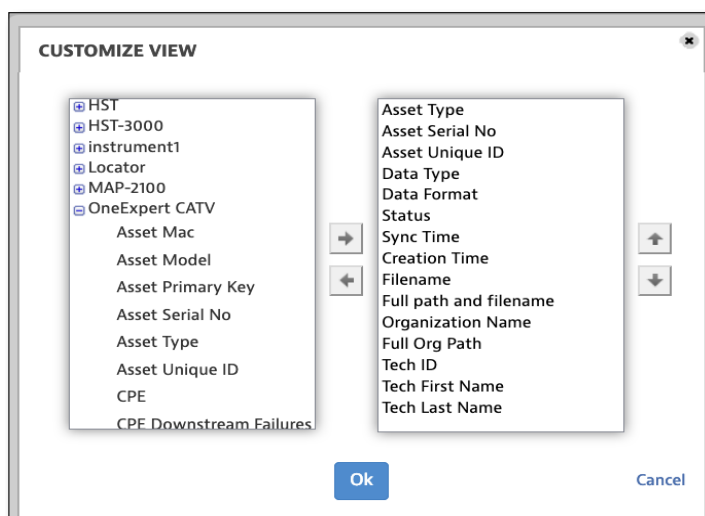
1. Select the **Test Data** tab, and then select **Test Data List**. The Test Data List appears.
2. Select **Customize view** at the upper left of the screen. The Customize View screens appears.



The screenshot shows the 'Test Data List Default View' in the StrataSync application. The interface includes a top navigation bar with 'Dashboard', 'Assets', and 'Test Data' tabs. The 'Test Data' tab is active, and the 'Default View' is selected. On the left side, there are sections for 'Current Filters' (showing 'Asset Type: OneExpert CATV, DSP'), 'Favorite Views' (including 'My Saved views' and 'Default View'), and 'Shared views'. The main content area displays a table with columns: Sync Time, Creation Time, Filename, Full path and filename, Organization Name, Full Org Path, Tech ID, Tech First Name, and Tech Last Name. The table contains 10 rows of data. Above the table, there are 'Actions' and 'For 0 selected record(s)' options. On the right side, there are 'Download Report' and 'Page 1 of 244' indicators. Two annotations with arrows point to the 'Save view As' and 'Customize view' buttons in the top left of the view area.

Test Data List Default View

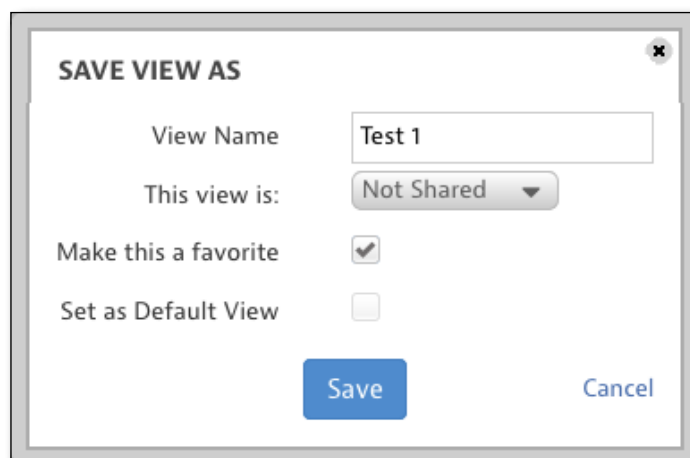
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



## Saving views

- From the Test Data List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
- Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
- When done, click **Save**.

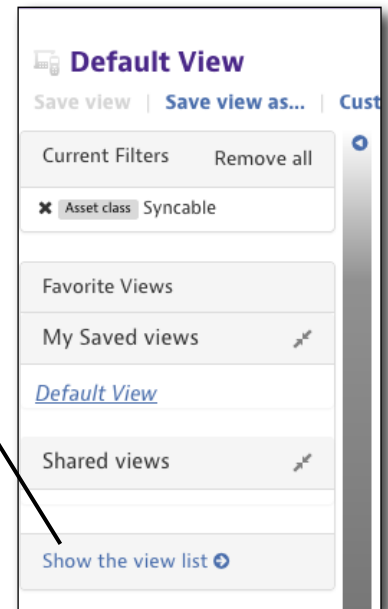
The new view is listed under the Favorite Views section on the left.



## Sharing and editing views

1. From the Test Data List, select **Show the view list** on the left side of the screen. The Saved and Shared Views screens appears.

*Show the view list*



2. Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
3. When finished, click **Done**.

SAVED AND SHARED VIEWS						
View Name	Created By	Last Modified	Shared	Favorite	Default	Actions
All columns	JDSU Demo1	10/07/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
B Test 1	Barry Howell	01/21/2019	Not Shared	<input type="checkbox"/>	<input type="radio"/>	<a href="#">Rename</a> <a href="#">Delete</a>
Brian's Cal View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's Org View	JDSU Demo1	10/21/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
CellAdvisor Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM with 0 sn	JDSU Demo1	05/01/2014	Shared	<input type="checkbox"/>	<input type="radio"/>	
HST-3000 Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	

[Done](#)

**Note:** Once a shared view is created, it cannot be edited. You need to create a new one and delete the old one.

# Test Data List

## Downloading test data

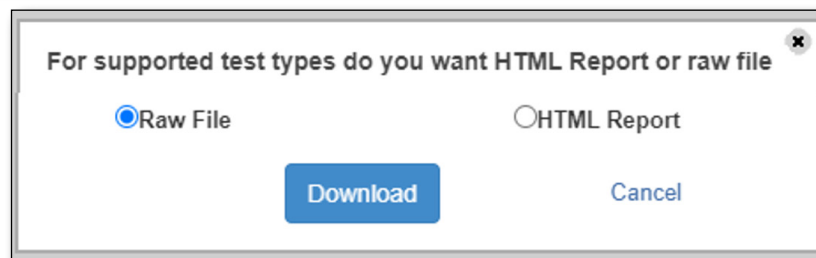
1. From the Test Data List, select a view on the left that includes the asset you want to download or use the filters to find it.
2. Right click the asset data you want to download and choose **Download** (or use the **Actions** dropdown).
3. A pop-up appears asking if you want to download the HTML version (for supported test types, typically where 'Data Format' = "application/json") or the raw test results file. Select the file type and click **Download**.

If you select **HTML Report**, any test results files which support an HTML view will be included in the downloaded ZIP file as HTML, and any other file types will be included in their native formats.

If you select **Raw File**, all test results files will be downloaded in their native formats.

4. Choose where you want to save the file.

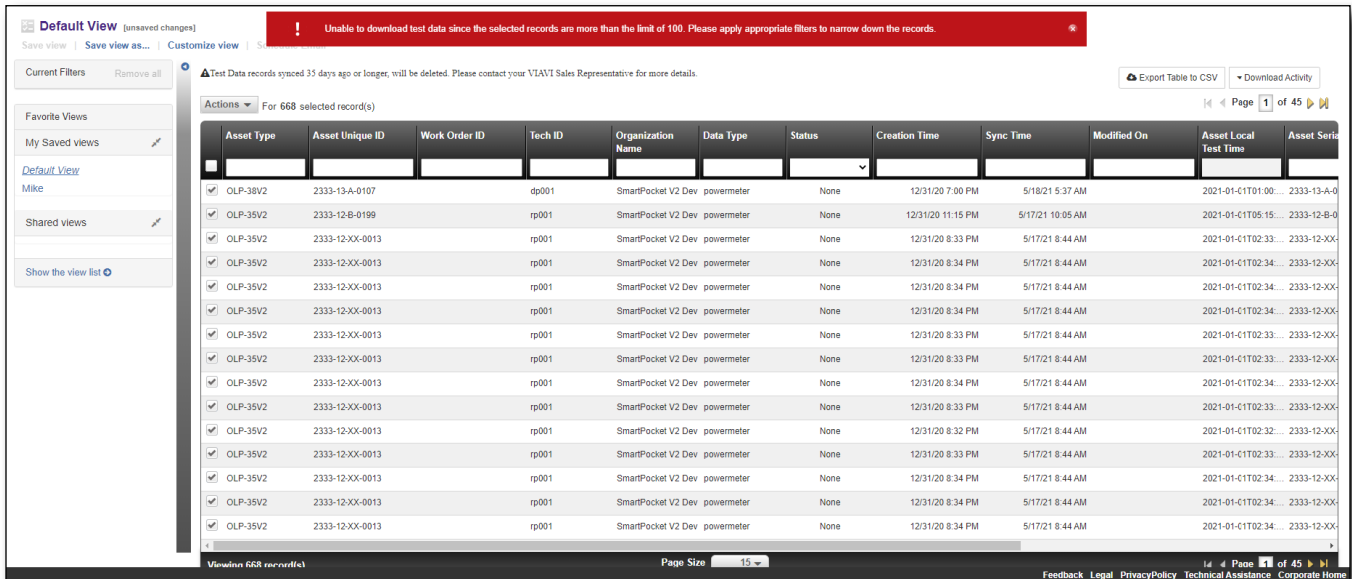
Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
09/20/2016 02:16	04/15/2016 00:20	session.default	/cust/private/cable/sessi...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 02:20	default.channelcheck.Tap	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/18/2016 05:44	default.docsischeck.CPE	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 00:20	default.docsischeck.Gro...	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 02:23	default.docsischeck.Tap	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 01:30	default.onecheck.CPE	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/25/2016 04:22	default.onecheck.Groun...	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 01:27	default.onecheck.Tap	/cust/private/cable/report...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/25/2016 04:22	demo	/cust/public/reports/demo	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/25/2016 04:22	demo	/cust/public/reports/repor...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1



### Choosing the test results download type

For customers on a StrataSync BASE account (or the legacy CORE), users can select up to a maximum of 100 table rows (each row representing a test data file) to initiate a download as a compressed '.zip' file (if you just download a single file the file is not compressed). Customer accounts with any new StrataSync subscription plan (PRO, ANALYTICS or ENTERPRISE WORKFLOW), or appropriate legacy PLUS licensing, will support users selecting up to 1,000 files for export.

Depending on the account licensing, if a user selects more than the appropriate limit, a warning message is displayed as shown in the example below.

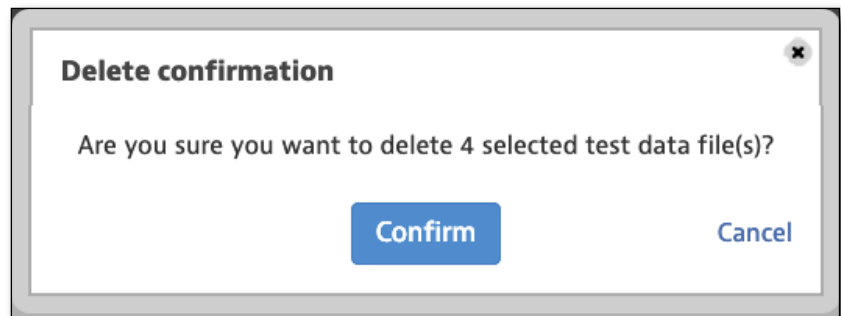


## Deleting test data

If you have the appropriate permissions, you can delete test data.

Select the data you want to delete, then right-click and choose **Delete** (or use the **Actions** dropdown).

A confirmation screen asks you to confirm. Click **Confirm**.



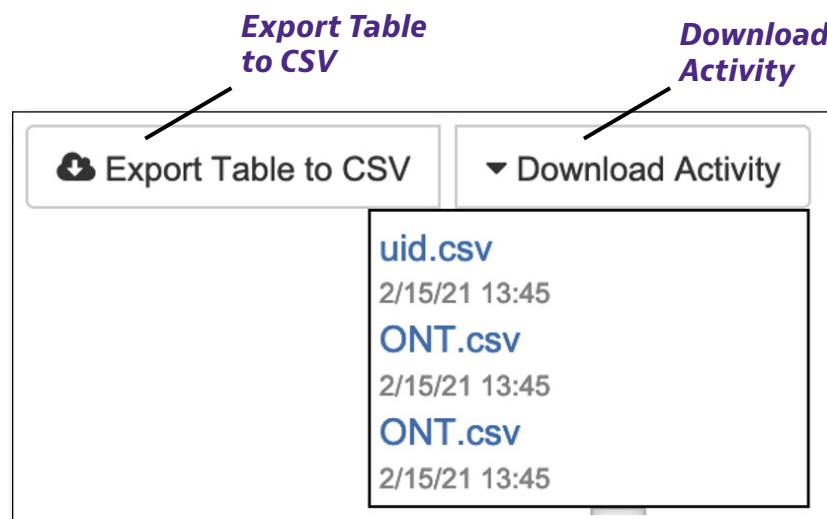
## Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

For customers on a StrataSync BASE account (or the legacy CORE), users can select up to a maximum of 1,000 table rows (each row representing the metadata for a test data file) to export to a CSV file. Customer accounts with any new StrataSync subscription plan (PRO, ANALYTICS or ENTERPRISE WORKFLOW), or appropriate legacy PLUS licensing, will support users selecting up to 80,000 rows for export.

Depending on the account licensing, if a user selects more than the appropriate limit, a warning message is displayed as shown in the example below.

Default View [unsaved changes] | Unable to download report into CSV file since the result size is more than the limit of 1000. Please apply appropriate filters to narrow down the results.

Test Data records synced 35 days ago or longer, will be deleted. Please contact your VIATV Sales Representative for more details.

Export Table to CSV | Download Activity

Page 11 of 464

Asset Type	Asset Unique ID	Work Order ID	Tech ID	Organization Name	Data Type	Status	Creation Time	Sync Time	Modified On	Asset Local Test Time	Asset Series	
<input checked="" type="checkbox"/>	NSC	RRSP0034590102	20210513T213044	lc001	NSC Engineering	oneCheckPON	Pass	5/13/21 9:44 PM	5/17/21 12:09 PM	5/13/21 9:44 PM	2021-05-13T21:44...	RRSP00345
<input checked="" type="checkbox"/>	NSC	RRSP0034590102	20210513T213044	lc001	NSC Engineering	oneCheckPON	Pass	5/13/21 9:46 PM	5/17/21 12:09 PM	5/13/21 9:46 PM	2021-05-13T21:46...	RRSP00345
<input checked="" type="checkbox"/>	NSC	RRSP0034590102	20210513T213044	lc001	NSC Engineering	oneCheckPON	Pass	5/13/21 9:48 PM	5/17/21 12:09 PM	5/13/21 9:48 PM	2021-05-13T21:48...	RRSP00345
<input checked="" type="checkbox"/>	NSC	RRSP0034590102	20210513T213044	lc001	NSC Engineering	oneCheckPON	Pass	5/13/21 9:50 PM	5/17/21 12:09 PM	5/13/21 9:50 PM	2021-05-13T21:50...	RRSP00345
<input checked="" type="checkbox"/>	NSC	RRSP0034590102	20210513T213044	lc001	NSC Engineering	oneCheckPON	Pass	5/13/21 9:51 PM	5/17/21 12:09 PM	5/13/21 9:51 PM	2021-05-13T21:51...	RRSP00345
<input checked="" type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Fail	5/14/21 4:03 PM	5/17/21 12:09 PM	5/14/21 4:03 PM	2021-05-14T16:03...	RRSP00308
<input checked="" type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Pass	5/14/21 4:02 PM	5/17/21 12:09 PM	5/14/21 4:02 PM	2021-05-14T16:02...	RRSP00308
<input type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Fail	5/14/21 4:01 PM	5/17/21 12:09 PM	5/14/21 4:01 PM	2021-05-14T16:01...	RRSP00308
<input type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Fail	5/14/21 4:00 PM	5/17/21 12:09 PM	5/14/21 4:00 PM	2021-05-14T16:00...	RRSP00308
<input type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Fail	5/14/21 3:59 PM	5/17/21 12:09 PM	5/14/21 3:59 PM	2021-05-14T15:59...	RRSP00308
<input type="checkbox"/>	NSC	RRSP0030800267	20210513T213045	ks001	NSC Engineering	oneCheckEthernet	Fail	5/14/21 3:58 PM	5/17/21 12:09 PM	5/14/21 3:58 PM	2021-05-14T15:58...	RRSP00308



# People

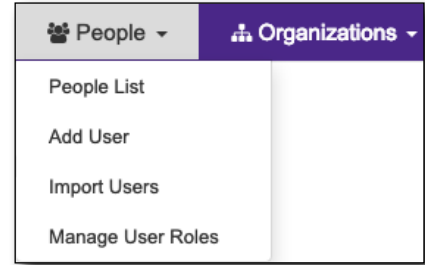
This chapter covers how to use the People Management features of StrataSync, including the following:

- "People" on page 138
- "Searching and sorting" on page 139
- "Views" on page 142
- "People List" on page 145
- "Adding a user" on page 153
- "Importing users" on page 160
- "Managing user roles" on page 161

# People

The **People** tab is the hub for all of the user and role management features of your StrataSync account, including: adding and importing users, and managing those users' roles and permissions.

Click the **People** tab in the Main menu to bring up the People dropdown.



People dropdown menu

People tab

Actions	For 0 selected record(s)	Page 1 of 28											
Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name	Number of assets	Mobile Phone	Login Enabled	Last Log Date
<input type="checkbox"/>	jdsu.demo1@jdsu.com	JDSU	Demo1	demo1	Administrator	Stage_JDSU Demo1	Stage_JDSU Demo1	jdsu.demo1@jdsu.com	JDSU	Demo1	30		Yes
<input type="checkbox"/>	south.manager@jdsu.com	South	Manager	southmanager	Manager	South Region	Stage_JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	north.manager@jdsu.com	North	Manager	northmanager	Manager	North Region	Stage_JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	0		Yes
<input type="checkbox"/>	west.manager@jdsu.com	West	Manager	westmanager	Manager	West Region	Stage_JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	east.manager@jdsu.com	East	Manager	eastmanager	Manager	East Region	Stage_JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes
<input type="checkbox"/>	east.tech1@jdsu.com	East	Tech1	east_tech1	Administrator	East Reg1	Stage_JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	west.tech1@jdsu.com	West	Tech1	west_tech1	Technician	West Region	Stage_JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes
<input type="checkbox"/>	south.tech1@jdsu.com	South	Tech1	south_tech1	Technician	South Region	Stage_JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	north.tech1@jdsu.com	North	Tech1	north_tech1	Technician	North Region	Stage_JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	1		Yes
<input type="checkbox"/>	east.tech2@jdsu.com	East	Tech2	east_tech2	Technician	East Reg1 SubReg1	Stage_JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	west.tech2@jdsu.com	West	Tech2	west_tech2	Technician	West Region	Stage_JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes
<input type="checkbox"/>	south.tech2@jdsu.com	South	Tech2	south_tech2	Technician	South Region	Stage_JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes
<input type="checkbox"/>	north.tech2@jdsu.com	North	Tech2	north_tech2	Technician	north2	Stage_JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	0		Yes
<input type="checkbox"/>	west.tech3@jdsu.com	West	Tech3	west_tech3	Technician	WEST A	Stage_JDSU Demo1.Wes...	jdsu_demo1_001@jdsu...	JDSU	Super_tech	0		Yes
<input type="checkbox"/>	east.tech3@jdsu.com	East	Tech3	east_tech3	Technician	East Region	Stage_JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes

People List selected from the People tab

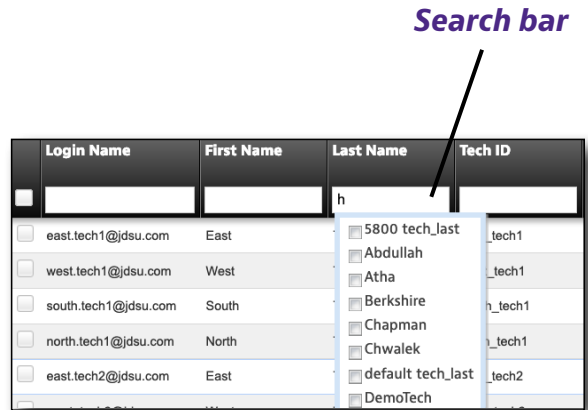
## Searching and sorting

From the People List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

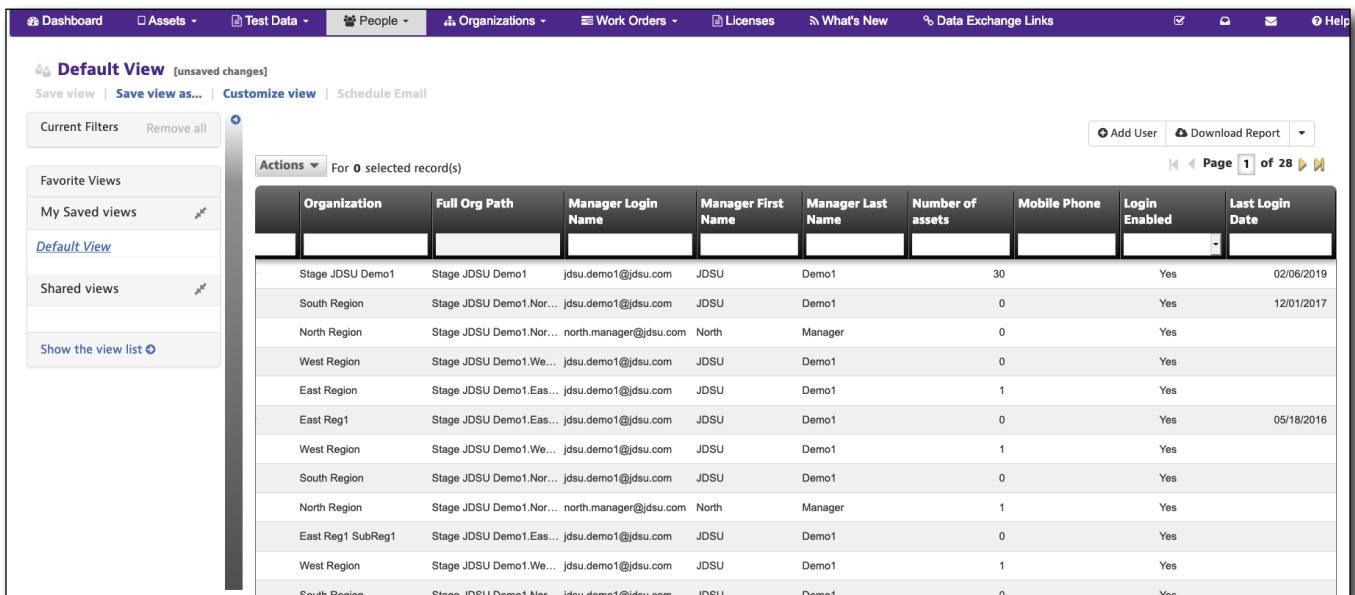
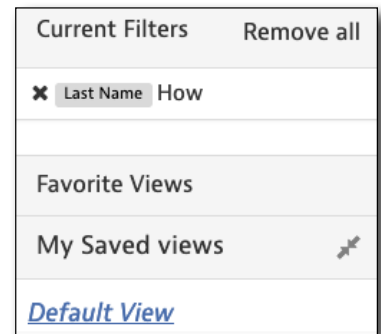
### Searching

You can search by typing into the search bar under a column header. The list updates with the results.

Some of the columns provide dropdowns with relevant options once you start typing.



The filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



Scroll to the right to reveal more detail, including Manager's Name and Last Login Date.

### Filtering multiple items

The Role column allows you to select multiple items to filter at the same time (e.g. filter Firmware Tester and Admin only). When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Role	Organization
Firmware Test	

**ROLE FILTER** ✕

Clear selected items

- Firmware Tester
- Administrator
- Default
- Firmware User
- GenAdmin
- Headend
- LQQ\_role
- Level 1
- Level 2
- Level 3
- Level 4
- Manager
- Manager 4

**Apply**

#### NOTE:



**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Last Login Date column allows you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

None	Login Enabled	Last Login Date

**SELECT A DATE RANGE** ✕

Exact dates

Start: 1/4/19 📅

End: 4/25/19 📅

**Apply**

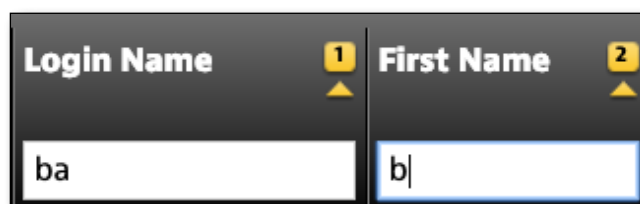
**NOTE:**

*You can save custom filters to a favorite view for easy reference. See ["Saving views" on page 143](#).*

## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

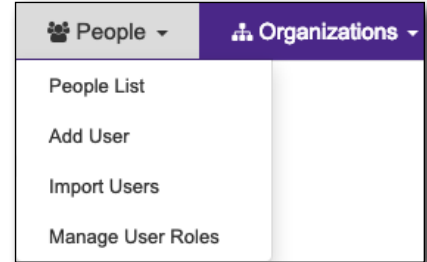


# Views

## Customizing views

StrataSync gives you the ability to customize your list views.

1. Select the **People** tab, and then select **People List**. The People List appears.
2. Select **Customize view** at the upper left of the screen. The Customize View screens appears.

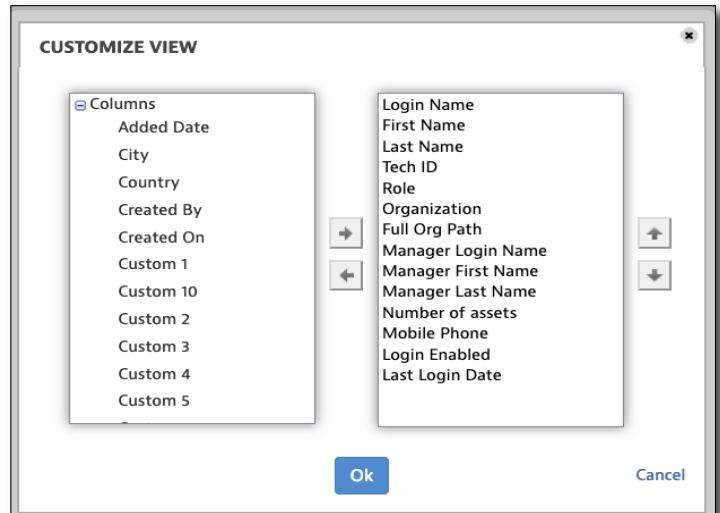


**Save view as**      **Customize view**

Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name	Number of assets	Mobile Phone	Login Enabled	Last Log Data
jdsu.demo1@jdsu.com	JDSU	Demo1	demo1	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu.demo1@jdsu.com	JDSU	Demo1	30		Yes	
south.manager@jdsu.com	South	Manager	southmanager	Manager	South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
north.manager@jdsu.com	North	Manager	northmanager	Manager	North Region	Stage JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	0		Yes	
west.manager@jdsu.com	West	Manager	westmanager	Manager	West Region	Stage JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
east.manager@jdsu.com	East	Manager	eastmanager	Manager	East Region	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
east.tech1@jdsu.com	East	Tech1	east_tech1	Administrator	East Reg1	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
west.tech1@jdsu.com	West	Tech1	west_tech1	Technician	West Region	Stage JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
south.tech1@jdsu.com	South	Tech1	south_tech1	Technician	South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
north.tech1@jdsu.com	North	Tech1	north_tech1	Technician	North Region	Stage JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	1		Yes	
east.tech2@jdsu.com	East	Tech2	east_tech2	Technician	East Reg1 SubReg1	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
west.tech2@jdsu.com	West	Tech2	west_tech2	Technician	West Region	Stage JDSU Demo1.Wes...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
south.tech2@jdsu.com	South	Tech2	south_tech2	Technician	South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
north.tech2@jdsu.com	North	Tech2	north_tech2	Technician	north2	Stage JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	0		Yes	
west.tech3@jdsu.com	West	Tech3	west_tech3	Technician	WEST A	Stage JDSU Demo1.Wes...	jdsu_demo1_001@jdsu...	JDSU	Super_Tech	0		Yes	
east.tech3@jdsu.com	East	Tech3	east_tech3	Technician	East Region	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	

**People List Default View**

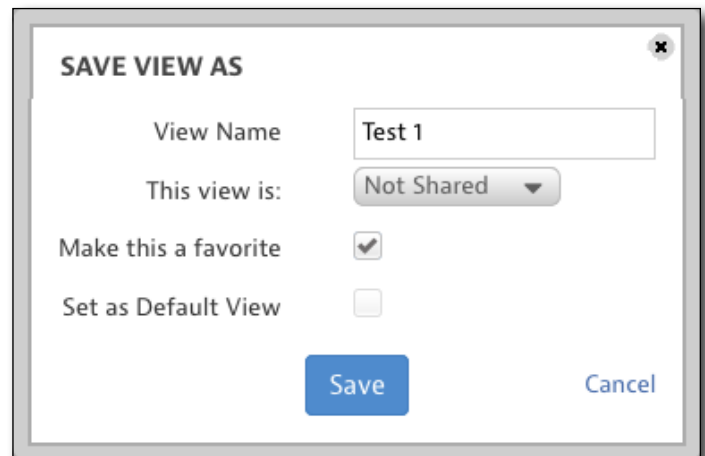
- In the left column, you will see the items to include in your view. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



## Saving views

- From the People List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
- Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
- When done, click **Save**.

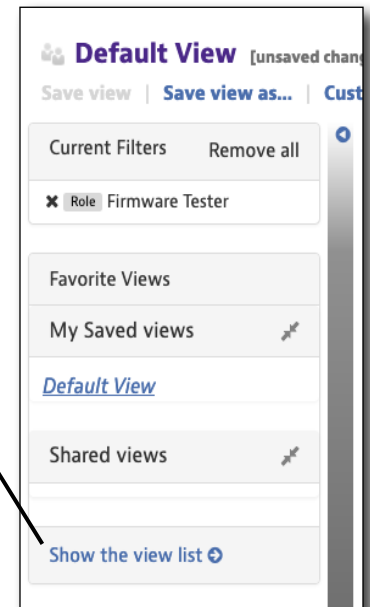
The new view is listed under the Favorite Views section on the left.



## Sharing and editing views

1. From the People List, select **Show the view list** on the left side of the screen. The Saved and Shared Views screens appears.

*Show the view list*



2. Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
3. When finished, click **Done**.

SAVED AND SHARED VIEWS						
View Name	Created By	Last Modified	Shared	Favorite	Default	Actions
All columns	JDSU Demo1	10/07/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
B Test 1	Barry Howell	01/21/2019	Not Shared	<input type="checkbox"/>	<input type="radio"/>	<a href="#">Rename</a> <a href="#">Delete</a>
Brian's Cal View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's Org View	JDSU Demo1	10/21/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
CellAdvisor Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM with 0 sn	JDSU Demo1	05/01/2014	Shared	<input type="checkbox"/>	<input type="radio"/>	
HST-3000 Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	

[Done](#)

**Note:** Once a shared view is created, it cannot be edited. You need to create a new one and delete the old one.



## People List

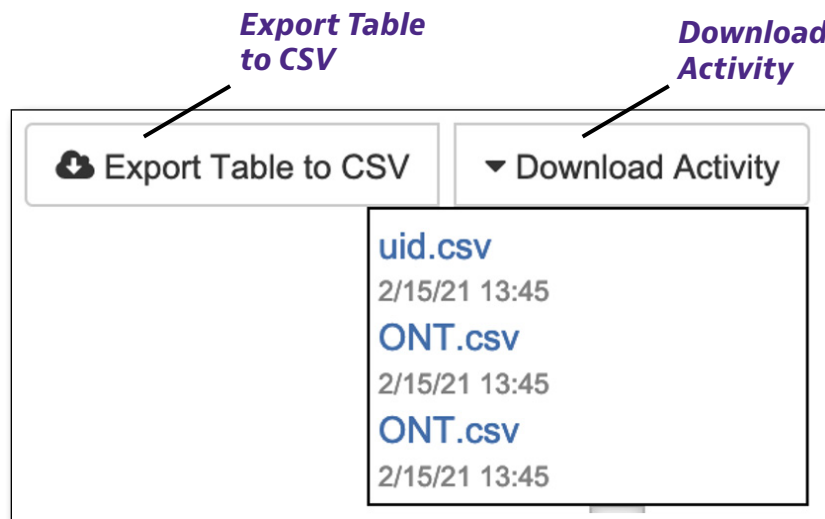
### Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

## Editing user details

1. From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.
2. Double click the user to bring up the details screen.
3. Edit the information as needed, then click **Save** to confirm.

You can change any of the information except the username.

The screenshot shows a web application interface for editing user details. The breadcrumb trail is "People List > east.tech1@jdsu.com". The user name is "East Tech1 - East.Tech1@jdsu.com".

**User Information**

- Username: east.tech1@jdsu.com
- \* Email: East.Tech1@jdsu.com
- \* First Name: East
- \* Last Name: Tech1
- Unique ID: 8202
- \* Employee/Tech ID: east\_tech1

**Contact Information**

- Mobile Phone: [input field]
- Office Phone: [input field]
- Street Address: [input field]
- City: [input field]
- State: [input field]
- Postal Code: [input field]
- Country: [input field]

**Access and Visibility**

- Login Enabled:
- Visibility Organization: East\_Reg1
- Organization: East\_Reg1

**Actions**

- View this user's assets
- View this user's test data
- Reset Password

**Attributes**

- Created Date: 10/21/2013 14:57
- Last Modified: 07/19/2018 21:51
- Last Login: 05/18/2016 10:39
- Assigned Assets: 0

### View this user's assets

From the User Details screen, you can view the assets associated to this user.

On the right side under the Actions panel, select **View this user's assets**. The User Assets screen is displayed.

*View this user's assets*

Actions

- [View this user's assets](#)
- [View this user's test data](#)
- [Reset Password](#)

Attributes

Created Date:10/21/2013 14:57  
 Last Modified:07/19/2018 21:51  
 Last Login:05/18/2016 10:39  
 Assigned Assets:0

Asset class	Asset Type	Model	Unique ID	Serial No	Organization
<input type="checkbox"/> Syncable	SmartClass TPS	SCTPS-AB-CU	103a1618030d1802	RGAK0073830631	East Region

### View this user's test data

From the User Details screen, you can view the user's test data information.

On the right side under the Actions panel, select **View Configuration**. The User Test Data screen is displayed.

*View this user's test data*

Actions

- [View this user's assets](#)
- [View this user's test data](#)
- [Reset Password](#)

Attributes

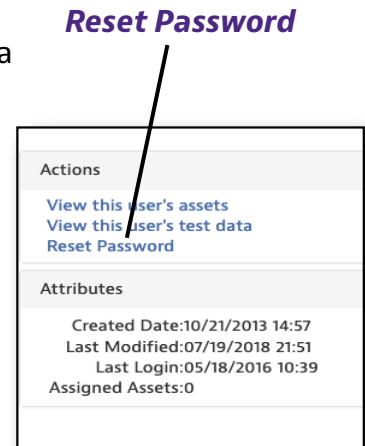
Created Date:10/21/2013 14:57  
 Last Modified:07/19/2018 21:51  
 Last Login:05/18/2016 10:39  
 Assigned Assets:0

Asset Type	Asset Serial No	Asset Unique ID	Data Type	Data Format	Status	Sync Time	Creation Time	Filename	Full path and filename
<input type="checkbox"/> DSAM	1101215	1101215	Forward Spectrum	text/xml	None	10/23/2013 13:34	10/23/2013 13:34	filename	/measfiles/fy/OFF/finer
<input type="checkbox"/> DSAM	1101215	1101215	TechComplete Ho...	text/xml	Fail	10/23/2013 16:29	10/23/2013 16:28	filename	/measfiles/01624u/C
<input type="checkbox"/> DSAM	0192099	0192099	Ingress Scan	text/xml	None	11/04/2013 12:45	11/04/2013 12:44	is1	/measfiles/Default Fol
<input type="checkbox"/> DSAM	0192099	0192099	DOCSIS - Through...	text/xml	None	11/07/2013 10:04	03/02/2012 05:32	e3	/measfiles/Default Fol
<input type="checkbox"/> DSAM	0192099	0192099	DOCSIS - Through...	text/xml	None	11/07/2013 10:04	03/02/2012 05:31	e2	/measfiles/Default Fol

## Reset password

From the User Details screen, you can reset your password (or a user's if you have permission).

On the right side under the Actions panel, select **Reset Password**. The Reset Password screen is displayed.



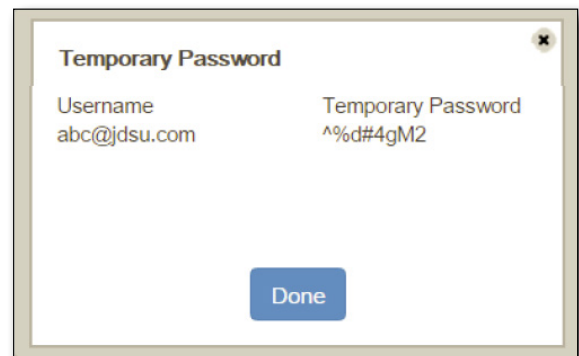
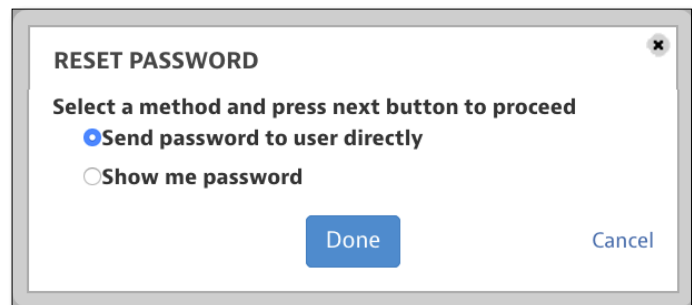
From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.

When you log in, enter the temporary password, then the new one. Enter it again to confirm.

When done, click **Save** to confirm.

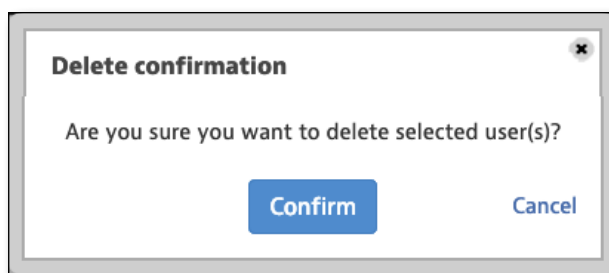
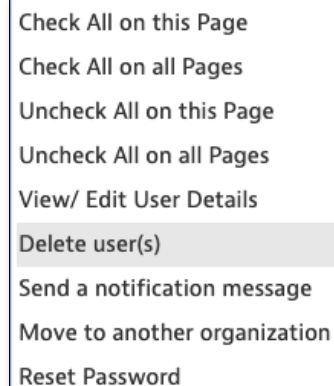
You can also change your password through Preferences. See ["Configuration" on page 227](#)

**Note:** If you need help changing your password, contact your StrataSync administrator.



## Deleting a user

1. From the People List, select the checkbox next to the user (or users) you want to delete.
2. Right-click the person (or use the **Action** dropdown) and select **Delete**.
3. A confirmation screen asks you to confirm. Click **Confirm**.



### NOTE:

**Before deleting a user, all associated assets must be removed.**

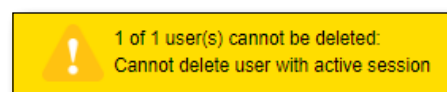
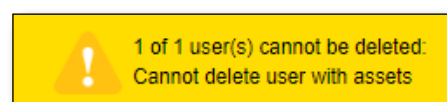
### StrataSync will not delete users under the following conditions:

- Before deleting a user, all associated assets must be removed (StrataSync returns this error if assets are assigned to the user).

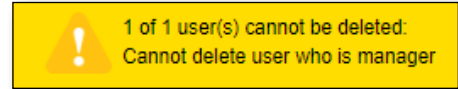
This issue is resolved by reassigning the assets to another StrataSync user.

- Users with an active StrataSync session cannot be deleted (StrataSync returns this error if the user has an active session).

The user cannot be deleted until the StrataSync session has ended. In User Details, uncheck the **Login Enabled** box (and select **Save**) to prevent the user from logging into StrataSync in the future. Then delete the user later after the StrataSync session has completed.



- Users that have been assigned the Manager of an Organization in the Organization tab cannot be deleted (StrataSync returns the following error if the user is the Manager of an Organization).



This issue is resolved by assigning another StrataSync user the Manager of the Organization(s) assigned to the user to be deleted. To find the Organization(s) assigned to the user, (from the People Tab) filter the People List by the user's login name in the Manager Login Name column. Note all Organizations listed in the Organization column.

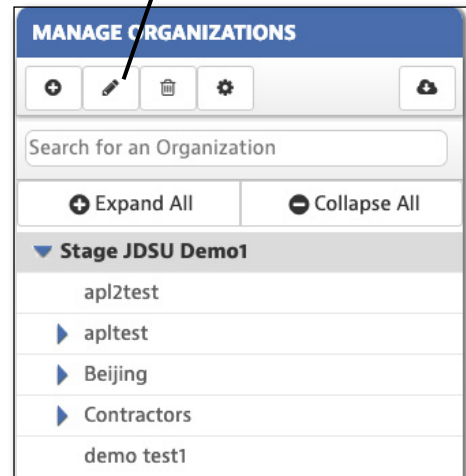
Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name
<input type="checkbox"/>							earl.pope@stagedemo.com
<input type="checkbox"/> bud.pope@stagedemo.c...	Earl	Pope	bp001	Firmware User	Earl Test	Stage JDSU Demo1.Earl...	earl.pope@stagedemo.com
<input type="checkbox"/> dk101@jdsu.com	Daniel	Kaffee	dk101	Default	Southeast	Stage JDSU Demo1.Earl...	earl.pope@stagedemo.com
<input type="checkbox"/> nj101@jdsu.com	Nathan	Jessup	nj101	Default	Southeast	Stage JDSU Demo1.Earl...	earl.pope@stagedemo.com
<input type="checkbox"/> jg101@jdsu.com	JoAnne	Galloway	jg101	Default	Southeast	Stage JDSU Demo1.Earl...	earl.pope@stagedemo.com

**Edit Organization**

From the Organizations tab, select the appropriate Organization(s) in the Manage Organizations tab. Then click **Edit Organization** and edit the Organization Manager to another appropriate StrataSync user.

When done, click **Save**.

See *"Editing organizations" on page 179* for more detail.



**Edit Organization**

\* Organization Name:

\* Manager Tech ID:

\* Manager First Name:

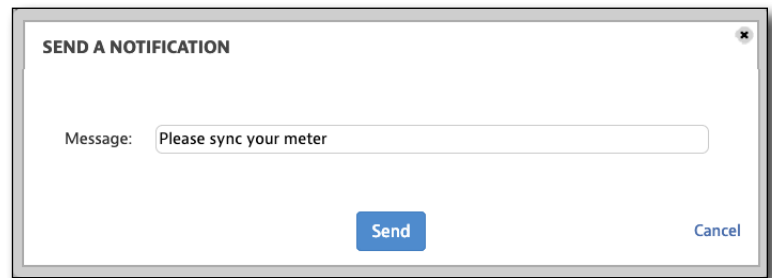
\* Manager Last Name:

Contractor ID:

Set maximum time for options checkout:  days

## Sending a notification to a user

1. From the People List, select the checkbox next to the user (or users) you want to notify.
2. Right-click the person (or use the **Action** dropdown) and select **Send a Notification Message**.
3. Click **Send**.



The screenshot shows a dialog box titled "SEND A NOTIFICATION" with a close button (X) in the top right corner. Inside the dialog, there is a "Message:" label followed by a text input field containing the text "Please sync your meter". Below the input field, there are two buttons: a blue "Send" button and a "Cancel" button.

## Moving a user

1. From the People List, select the checkbox next to the user (or users) you want to move.
2. Right-click the person (or use the **Action** dropdown) and select **Move to another organization**. The Move User screen appears.
3. Select the organization or suborg and click **Next**.
4. A confirmation screen asks you to confirm. The associated assets will also be moved. Click **Move**.

You can also choose to move the test data or leave it in the current org.

**MOVE USER**

Select Organization

Search for an Organization

⊕ Expand All    ⊖ Collapse All

▼ Stage JDSU Demo1

- apl2test
- ▶ apltest
- ▶ Beijing
- ▶ Contractors
- demo test1
- DemoCamelCase
- demolowercase
- demotest2
- DEMOUPPERCASE
- Duranti, Jimmy T
- ▶ East Region

Next ⏪    Cancel

**MOVE USER**

Moving users below to demo test1

Also move user's Test Data to demo test1

Note: The associated asset(s) will also be moved to demo test1

Employee/Tech ID	First Name	Last Name	Current Organization	Associated Assets
westmanager	West	Manager	West Region	0
east_tech1	East	Tech1	East Reg1	0

## Resetting passwords

Resetting a user's password is similar to the steps covered previously. See ["Reset Password" on page 148](#).



## Adding a user

1. Select the **People** tab, and then select **Add User**. The Add User screen appears.

You can also click the **Add User** button on the right side of the People List screen.

2. Enter the information as needed, username, email, first/last name, tech ID, etc.

The username must be unique for each StrataSync profile and formatted as an email address (e.g. johnsmith@abc.com), but doesn't have to be a valid email.

You can use the user's actual email address for both username and email address.

The Employee / Tech ID must also be unique for each profile.

3. To send a welcome email to the user with a temporary password, select **Send Email**.
4. Use the **Landing Site** dropdown to choose **Administrator** or **Technician** Site, then use the **Role** dropdown to choose a role.
5. Click **Visibility Organization** to change the permissions visibility for the user. All permissions granted to a user will apply to the visibility organization and its child organizations.
6. Click **Organization** to change the organization.

The following information will help guide selecting the correct organization for the user:

- Assets assigned to users are also assigned to the user's organization.
- Test data assigned to users is also assigned to the user's organization.

**ADD USER - Input user details**

**User Information**

\* Username:

\* Email:

\* First Name:

\* Last Name:

\* Employee/Tech ID:

Send email:

Landing Site:

Role:

Login Enabled:  User Information

Visibility Organization: [Stage JDSU Demo1](#)

Organization: [Stage JDSU Demo1](#)

Manager: JDSU Demo1

Contact Information ↗

Other Attributes ↗

Preferences ↗

**Add** Cancel

- Advanced asset management features are administered based on the user's organization (examples include firmware auto deploy, asset configuration template auto deploy, job template auto deploy, StrataSync control of Mobile Tech app settings, and StrataSync control of custom documentation).
- Deployment of asset software options should also be considered.

When asset software options are applied to a StrataSync account, the options are assigned to an organization.

When using StrataSync to deploy software options to assets, the asset must be assigned to the organization (or one of its child organizations) where the options are assigned. However, if the software options are deployed using the VIAVI Mobile Tech app, the software options can only be deployed if the options are assigned to the user's visibility organization.

7. Add additional optional contact information, attributes, and preferences in those sections.
8. When done, click **Add**. The new user will appear in the People List.

## Setting access and visibility

You can give a user certain access and visibility to data in the organization or suborganization. You can also move them to another organization from here.

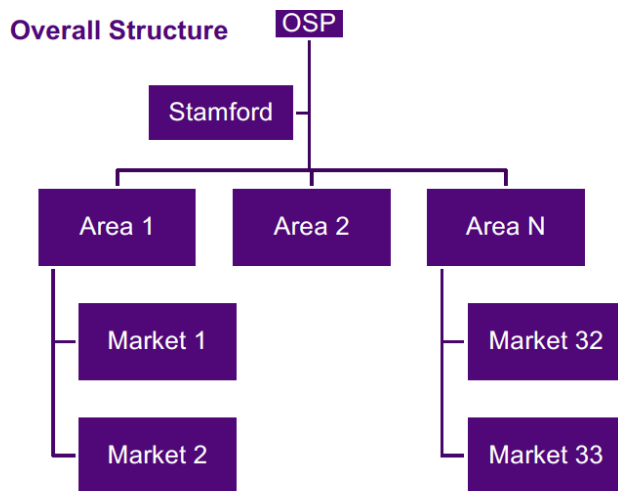
### Changing the visibility

From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.

Double click the user to bring up the details screen.

Under the Access and Visibility section, click the organization next to **Visibility Organization**. Choose the new organization, and click **OK**.

The diagram below shows a visual representation of an organization hierarchical view. If you have a user with visibility for Market 2, for example, you could move them up to have visibility for all of Area 1 or even higher to Stamford.



Example of an organization hierarchical view

Access and Visibility	
<b>Login Enabled:</b>	<input checked="" type="checkbox"/>
<b>Visibility Organization:</b>	West Region
<b>Organization:</b>	West Region
<b>Manager:</b>	JDSU Demo1

+ Expand All
- Collapse All

- ▼ Stage JDSU Demo1
  - apl2test
  - ▶ apltest
  - ▶ Beijing
  - ▶ Contractors
  - demo test1
  - DemoCamelCase
  - demolowercase
  - demotest2
  - DEMOUPPERCASE
  - Duranti, Jimmy T
  - ▶ East Region

Ok
Cancel

### Changing an organization

You can move users to another org from the User Details screen, similar to how it's done from the People List and from the People tab. See ["Moving a user" on page 152](#).

## Adding additional visibility

You can give a user additional visibility by setting up more organizations, landing sites, or roles for customized access. This is an advanced feature and is not recommended for most situations.

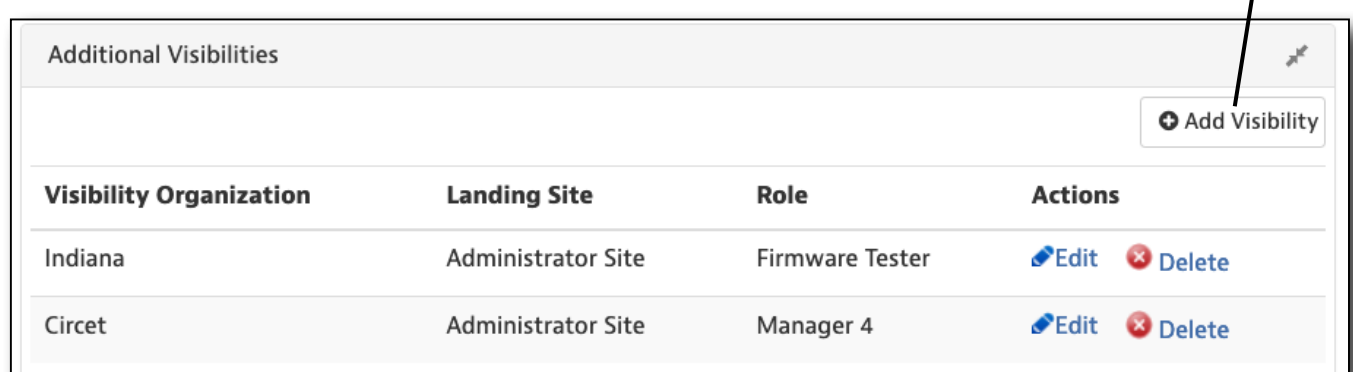
1. From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.
2. Double click the user to bring up the details screen.
3. Under the Additional Visibilities section, click the **Add Visibility** button on the right. The Add Visibility screen appears.

**Note:** The Landing Site for the user must be set to **Administrator Site** for the **Add Visibility** button to appear.

4. Next to **Visibility**, select a new visibility organization, and use the dropdowns to choose the **Landing Site** and **Role**.
5. When done, click **Save**. Continue to add more visibilities and they will show in the list.

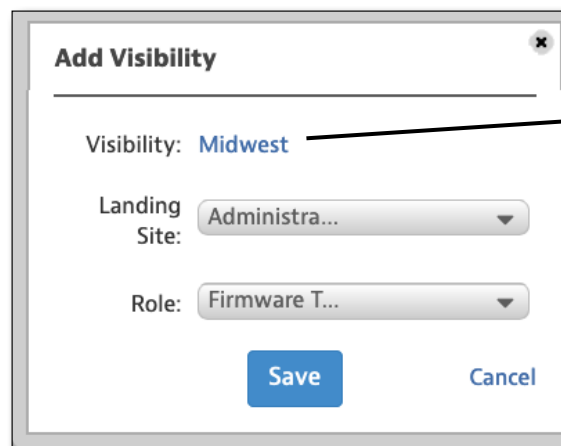
On the next login to StrataSync, the user will see the **Switch Visibility** icon next to the organization at the top of the screen.

*Add Visibility*



Additional Visibilities			
Visibility Organization	Landing Site	Role	Actions
Indiana	Administrator Site	Firmware Tester	<a href="#">Edit</a> <a href="#">Delete</a>
Circet	Administrator Site	Manager 4	<a href="#">Edit</a> <a href="#">Delete</a>

*Visibility Org*



**Add Visibility**

Visibility: Midwest

Landing Site: Administra...

Role: Firmware T...

[Save](#) [Cancel](#)

**Note:** Make sure you choose a different organization or suborganization when adding additional visibility organizations. You cannot use the same organization as the original visibility for the user.

### Switching visibility organizations

Once additional visibility has been set for the user, and they log back into StrataSync, they will see the **Switch Visibility** icon next to their organization dropdown at the top of the screen.

Select **Switch Visibility**. The Switch Visibility screen appears.

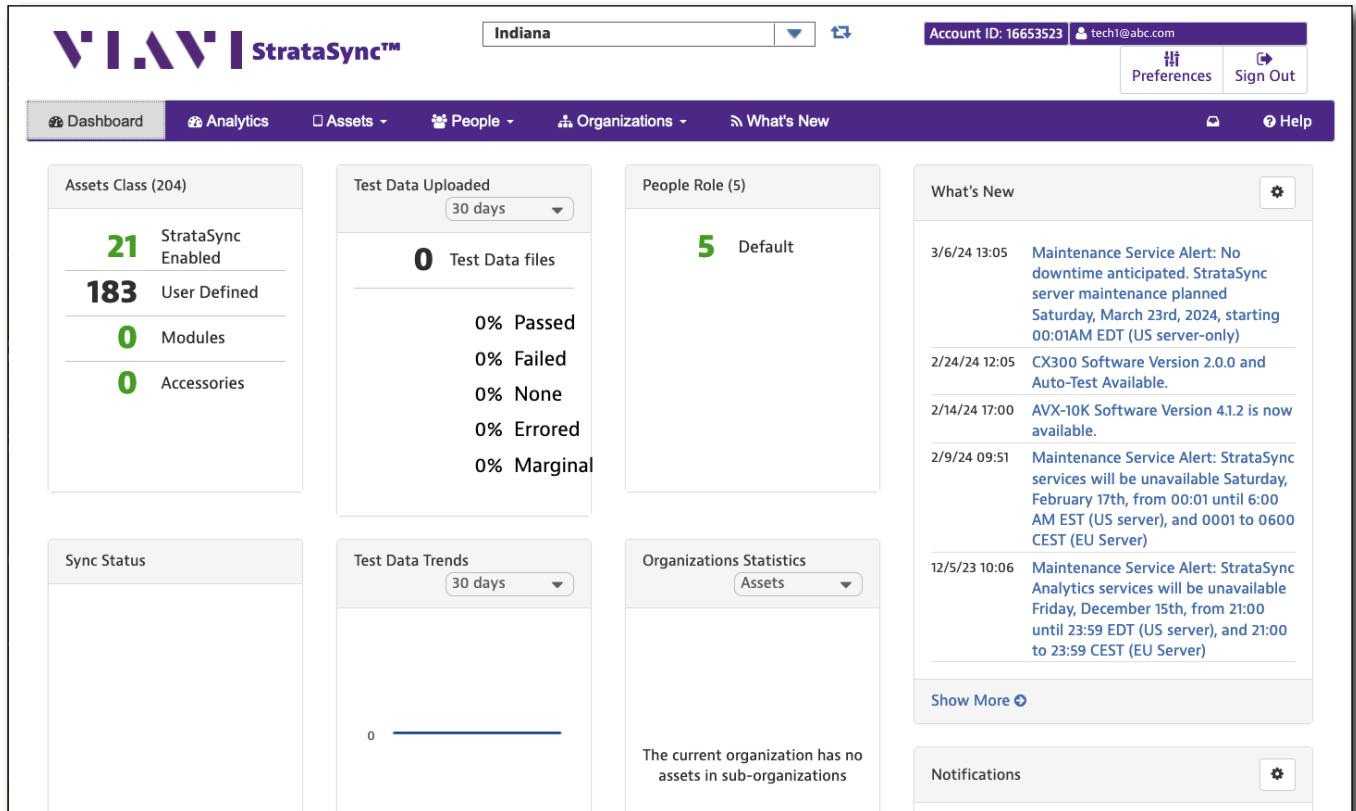
Choose the visibility organization and click **Apply**. StrataSync will refresh and show the details and data for that organization and its suborganizations only.

Use	Visibility Organization	Landing Site	Role	Default
<input checked="" type="radio"/>	Stage2 JDSU Demo1	Administrator	Administrator	Yes
<input type="radio"/>	Indiana	Administrator	Firmware Tester	No
<input type="radio"/>	Circet	Administrator	Manager 4	No

« 1 »

Apply Cancel

In this example, we chose to switch the visibility to **Indiana**. The Main Dashboard, People List, Assets, etc. now only show details for Indiana and its suborganizations.



## Assigning a role

You can give a user certain access and visibility to data in the organization or suborganization. You can also move them to another organization from here.

### **Assigning or changing role assignment**

From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.

Double click the user to bring up the details screen.

Under the Role section, use the **Landing Site** and **Role** dropdowns to make necessary changes.

When done, click **Save**.

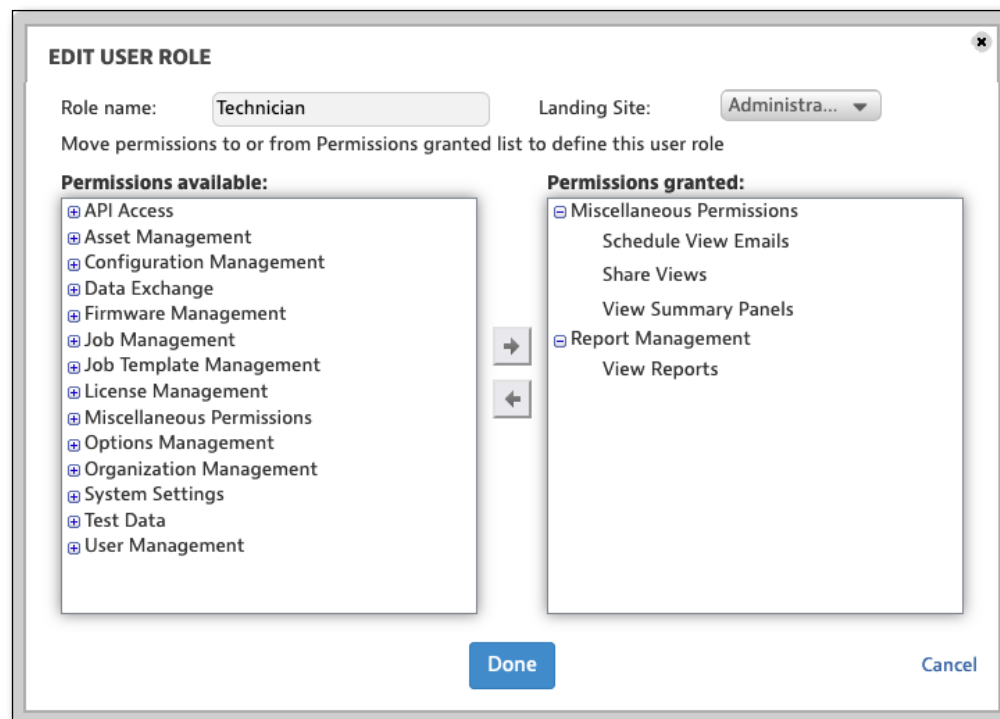
### **Adding additional permissions**

From the Roles section, you can also set additional permissions.

In the left column are the **Permissions available**. The right column shows the **Permissions granted**. Click the (+) to expand categories.

Select a permission, then use the arrow buttons to add or remove permissions to adjust the granted list on the right.

When done, click **Save**.



## Importing users

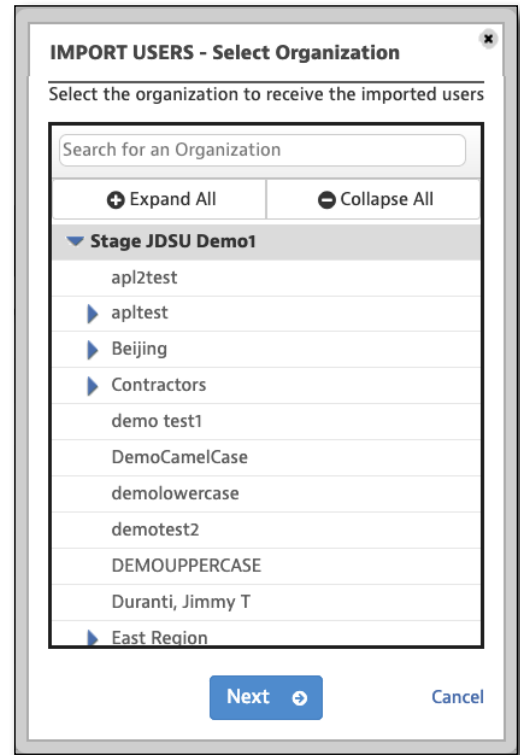
This section details how to import multiple users from a CSV file.

1. Select the **People** tab, and then select **Import Users**. The Import Users screen appears.
2. Select the organization or suborganization you want to import to, and click **Next**. The Select File screen appears.
3. To download a sample CSV file already formatted for StrataSync, select **Download sample CSV file**.

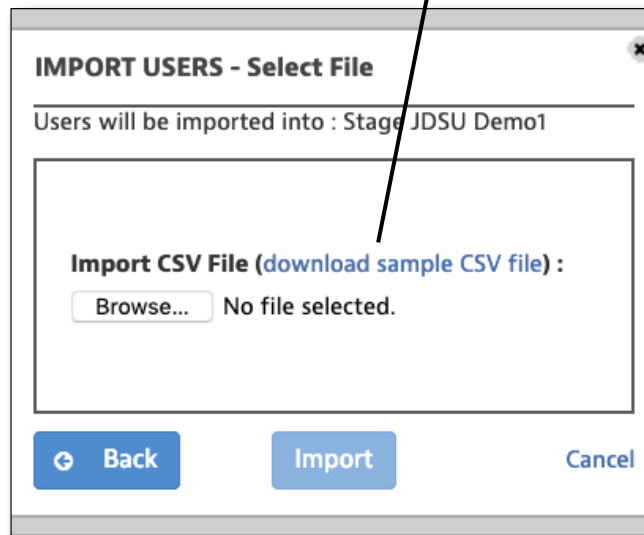
Make sure you retain the header row and enter the data fields starting on row 2. See the sample file for more information.

4. Select **Browse** and choose the file you want to import, then select **Import**.

The users will be imported into the People List.



**Download sample CSV**





## Importing changes for users

If you have bulk changes to update for users, the steps are similar to importing new users. Edit the CSV as needed, (updating the fields that have changed), and reimport the file as before. This includes organization changes, roles, etc.

## Managing user roles

This section details how to create and manage user roles. If you have the appropriate permissions, you can grant permissions for roles that are equal or under your own.

Select the **People** tab, and then select **Manage User Roles**. The Manage User Roles screen appears.

### Adding roles

Click **Create a new role** at the top right side of the screen. The Create User Role screen is displayed.

*Create a new role*

Role name	Landing Site	Users	Actions
Administrator	Administrator Site	58	
Default	Technician Site	11	
Firmware Tester	Administrator Site	1	<a href="#">Edit</a>
Firmware User	Administrator Site	1	<a href="#">Edit</a>
GenAdmin	Administrator Site	2	<a href="#">Edit</a>
Headend	Administrator Site	0	<a href="#">Edit</a> <a href="#">Delete</a>
LQQ_role	Administrator Site	4	<a href="#">Edit</a>
Level 1	Administrator Site	3	<a href="#">Edit</a>
Level 2	Administrator Site	0	<a href="#">Edit</a> <a href="#">Delete</a>

[Done](#) [Cancel](#)

Enter the role name and use the dropdown to choose the landing site.

In the left column are the **Permissions available**. The right column shows the **Permissions granted**. Click the (+) to expand categories.

Select a permission, then use the arrow buttons to add or remove permissions to adjust the granted list on the right.

When done, click **Done**.

A confirmation screen will ask if you want to create this role. Click **Confirm**. The roles will appear in the Manage User Roles screen.

**CREATE USER ROLE**

\* Role name:  Landing Site:

Move permissions to or from Permissions granted list to define this user role

**Permissions available:**

- + Data Exchange
- + Firmware Management
- + Job Management
- + Job Template Management
- + License Management
- + Miscellaneous Permissions
- + Options Management
- + Organization Management
  - Add Organizations
  - Delete Organizations
  - Edit Organizations
  - Import Organizations
  - Manage Organization Settings
  - Move Organizations

**Permissions granted:**

- + Asset Management
- + Organization Management
  - View Organizations
- + User Management
  - View Users

**NOTE:**



***We recommend there is at least one StrataSync Administrator per account, with only a limited group of admins max, since system settings are site wide.***

## Editing roles

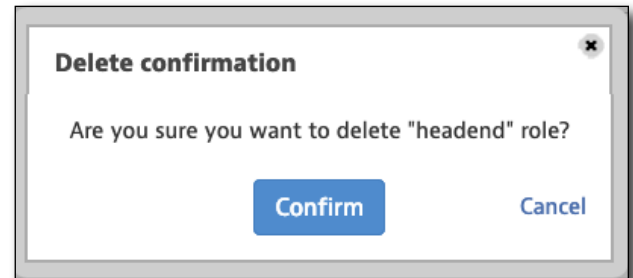
From the Manage User Roles screen, click **Edit** to update user roles.

Edit the information as needed, then click **Done** to confirm.

## Deleting roles

From the Manage User Roles screen, click **Delete** to delete user roles.

A confirmation screen asks if you want to delete. Click **Confirm**.



**NOTE:**

***Before deleting a role, all associated users must be removed.***

## Unidentified Tech ID role

StrataSync has a few ways it treats assets when a seemingly “new” Tech ID is synced from an asset.

When an asset is synced with an unknown Tech ID (i.e. a Tech ID that is not in the account’s People List), the **Unidentified Tech ID** role may be assigned.

You can auto-assign assets without a tech ID or have unidentified Tech IDs assigned to a specific ID, enabled in System Settings. See [“Asset management” on page 235](#) for details.

- If the asset exists in the system, is synced with an undefined Tech ID, and has previously been assigned to another tech in an organization at some point, StrataSync creates a new user with an Unidentified TechId role for the asset in the same organization. Otherwise, the asset information is updated and remains unassigned.

In this example, an asset was previously synced to a Tech ID. Sometime later, a new Tech ID syncs the asset to StrataSync, and since this ID is unknown, StrataSync creates a user with the Unidentified TechId role for the asset in the same organization.

- If the asset is already in the Holding Bin, it just gets updated with the asset information and remains in the Holding Bin. No user is created.
- If the asset does not exist in the account, it will be placed in the Holding Bin. No user is created.

In the example below, Tech ID 4580409 was populated in an asset and synced to StrataSync. However, Tech ID 4580409 is not in the People List for this StrataSync account. StrataSync creates a new user in this format:

- Username is “Tech ID entered in asset”\_“StrataSync Account Number”
- Email is “Tech ID entered in asset”\_“StrataSync Account Number”
- First Name “Tech ID entered in asset”\_“first”
- Last Name is “Tech ID entered in asset”\_“last”
- Tech ID is “Tech ID entered in asset”

User Information	
* Username:	4580409_16653523
* Email:	4580409_16653523
* First Name:	4580409_first
* Last Name:	4580409_last
Unique ID:	13866
* Employee/Tech ID:	4580409

The new user is assigned the Unidentified TechId role. Users in the People List with the Unidentified TechId role can be found by filtering on the Role field.

	Login Name	First Name	Last Name	Tech ID	Role
<input type="checkbox"/>					Unidentified TechId
<input type="checkbox"/>	t6d1_16653523	t6d1_first	t6d1_last	t6d1	Unidentified TechId
<input type="checkbox"/>	indyeng_16653523_man...	IndyEng_first	IndyEng_last	IndyEng	Unidentified TechId
<input type="checkbox"/>	4580409_16653523	4580409_first	4580409_last	4580409	Unidentified TechId
<input type="checkbox"/>	58729_16653523	58729_first	58729_last	58729	Unidentified TechId
<input type="checkbox"/>	tech5678_16653523	Tech5678_first	Tech5678_last	tech5678	Unidentified TechId
<input type="checkbox"/>	123_16653523	123_first	123_last	123	Unidentified TechId
<input type="checkbox"/>	company_16653523	Company_first	Company_last	company	Unidentified TechId

*Unidentified TechId*

### ***Tech ID best practices***

StrataSync Administrators should periodically filter the People List and Holding Bin for the users with Unidentified Tech IDs and take corrective action.

The two most common reasons for the creation of Unidentified TechIds are:

- The Tech ID populated in the asset is correct, but a StrataSync username has not been created for this legitimate Tech ID.
- This issue can be resolved by an Administrator editing the Unidentified TechId fields with proper information and assigning the user the correct role. Also, if appropriate, the **Login Enabled** box should be checked.
- The Tech ID populated in the asset is not correct; the Tech ID entered in the asset was a typo. This issue can be resolved by reassigning the asset to the correct Tech ID and then deleting the Unidentified TechId that is incorrect.

## Permissions details

The following includes details on all the available role permissions for each category.

### ***API Access***

**Asset API** – Add/update/delete assets via API interface

**Option API** – Add/update/delete option via API interface

**Test Data API** – Add/update/delete test data via API interface

### ***Asset Management***

**Add Asset** – Add an asset

**Assign Assets to Users** – Reassign asset to another user or move asset from holding bin to inventory

**Change Asset Status** – Change asset's state to Stolen, active etc.

**Delete Assets** – Delete asset from holding bin /inventory

**Edit Assets** – Edit an asset

**Enforce Firmware** – Allow firmware enforce

**Import Assets** – Import assets from external csv file

**Manage Asset Groups** – Manage (add/edit/remove assets to/from) asset groups

**Manage Asset Types** – Manage(Add/edit/delete) asset type

**Update Firmware\*** – Allow update firmware

**View Asset Configuration** – Allow View asset configuration

**View Assets\*** – View asset list under the 'Assets' tab etc.

### ***Configuration Management***

**Deploy Configurations** – Allow to deploy configuration data

**Handle Configuration Files** – Allow editing configuration files

**Manage Configuration Templates** – Allow create/edit for asset templates

**Manage Global Archives** – Allow view global archive/ manage global archive configuration files

**View Configuration Files** – Allow viewing configuration files

\* These roles are available for both Technician and Administrator role types. All others are Administrator only.

### **Data Exchange**

**Copy to Data Link** – Allow test data copy to data link

**Manage Links** – Manage(create/modify/delete) test data exchange links

**Manage Subscriptions** – Manage test data link subscriptions

**Share Work Orders** – Allow work orders to be shared

**View Links** – Allow viewing test data manage links

**View Subscriptions** – Allow viewing test data manage subscriptions

### **Firmware Management**

**Firmware Approver** – Allow firmware to be approved

**Firmware Tester** – Allow firmware to be tested

**Manage Firmware Auto Deploy Settings** – Allow management of firmware auto deploy settings

### **Job Management (Previously Work Order Management)\*\***

**Add Jobs** – Allow to add new jobs

**Approve Jobs** – Allow to approve completed jobs

**Assign Jobs** – Allow to assign jobs

**Delete Jobs** – Allow to delete jobs

**Edit Jobs** – Allow to edit jobs

**View Jobs** – Allow jobs to be viewed

### **Job Template Management (Test Process Automation only)\*\*\***

**Add Job Templates** – Allow to add new job templates

**Delete Job Templates** – Allow to delete job templates

**Deploy Job Templates** – Allow to deploy job templates

\*\* Previously, the Work Order Management permission group, renamed to Job Management. Updates do not impact existing user permissions or workflow for Work Order Management in previous versions of StrataSync (prior to 15.5). These permissions are also used for Test Process Automation, with different behavior. See the [TPA User Guide](#) for details.

\*\*\* The Job Template Management permission group does not impact existing user permissions for Job Template Management in previous versions of StrataSync (prior to 15.5). These permissions are only used for Test Process Automation. See the [TPA User Guide](#) for details.

**Edit Job Templates** – Allow to edit job templates

**View Job Templates** – Allow job templates to be viewed

### ***License Management***

**View License** – Allow viewing of licenses under Licenses tab

### ***Miscellaneous Permissions***

**Delete Service Documents** – Allow to delete service documents

**Schedule View Emails** – Email view on schedule

**Send Notifications** – Allow Send notification to user

**Share Views** – Share, un-share Personal Views

**View Summary Panels** – View summary panels on Dashboard

### ***Options Management***

**Assign Options\*** – Assign permanent and timed software options to assets

**Generate Installed Options Report** – Installed options report for assets

**Generate Option Utilization Report** – Utilization report for floating and timed floating options per asset

**Import Options** – Allow viewing of import options link(under manage asset options) for bulk import of options

**Manage Floating Options\*** – Assign floating options to assets

**Move Options** – Move/reallocate options to other organization

**View Options\*** – View software options/order details

### ***Organization Management***

**Add Organizations** – Add organization unit (under Manage Organizations)

**Delete Organizations** – Delete organization unit (under Manage Organizations)

**Edit Organizations** – Edit organization unit(under Manage Organizations)

**Import Organizations** – Import organizations (upload file)

**Manage Organization Settings** – Enable editing organization settings (under Manage Organizations)

**Move Organizations** – Move organization in the organization hierarchy (under Manage Organizations)

**View Organizations** – View Organization list (under Organizations tab)



## ***Report Management***

**View Reports** – Allow reports to be viewed

## ***System Settings***

**Manage Anti-Theft Settings** – Manage anti-theft settings for instruments

**Manage Artifact Link Settings** – Manage artifact link settings for instruments

**Manage Asset Management Settings** – Manage asset management system settings

**Manage Auto Purge Work Order Settings** – Manage auto purge settings for work orders

**Manage Calibration Due Settings** – Configure calibration due times

**Manage Customer Doc Settings** – Manage customer documentation settings

**Manage Failed Test Notifications Settings** – Manage failed test notification events

**Manage Firmware Management Settings** – Manage firmware management settings for instruments

**Manage General Settings** – Manage general preferences

**Manage Lease Company Settings** – Manage (add/edit/delete) lease company

**Manage Measurement Units Settings** – Configure measurement units

**Manage Mobile Tech Settings** – Manage Mobile Tech app preferences

**Manage Notifications Settings** – Manage notification events

**Manage Organization Settings** – Enable organization settings override system settings

**Manage POP Report Limits Settings** – Configure POP report limits

**Manage Security Settings** – Manage security preferences (password)

**Manage Template Auto Deploy Settings** – Manage template auto deploy settings for instruments

**Manage What's New Settings** – Manage What's New subscriptions

## ***Test Data***

**Delete Test Data** – Allow to delete test data

**View Test Data** – View test data lists

**View Test Data File** – View or download test data files

## **User Management**

**Add Users** – Allow creating new users in system (Add users under People tab)

**Assign Roles** – Allow assigning of roles to users

**Delete Users** – Allow to delete users

**Edit Users** – Allow to edit user details

**Edit Users without Tech** – Edit user details without being able to modify the techId. This allows local supervisors/managers to update details for their technicians including organization association, but without mistakenly modifying the corporate-mandated personnel IDs (mapped to techId in StrataSync).

**Import Users** – Import users in bulk (People tab - file upload)

**Manage Additional Visibility** – Manage additional visibility organizations for users

**Manage Roles** – Manage(create/edit/delete) user roles

**Move Users** – Move users to another organization

**Reset Password** – Reset password for user (Reset Password link in user details)

**View Users** – View list of users (People List under People tab)

# Organizations

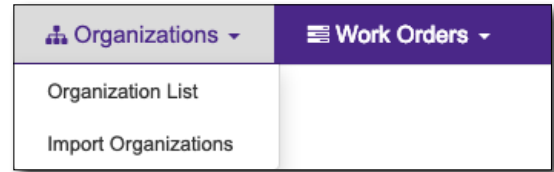
This chapter covers how to use the Organization Management features of StrataSync, including the following:

- "Organizations" on page 172
- "Searching and sorting" on page 173
- "Organization List" on page 176
- "Importing organizations" on page 186

# Organizations

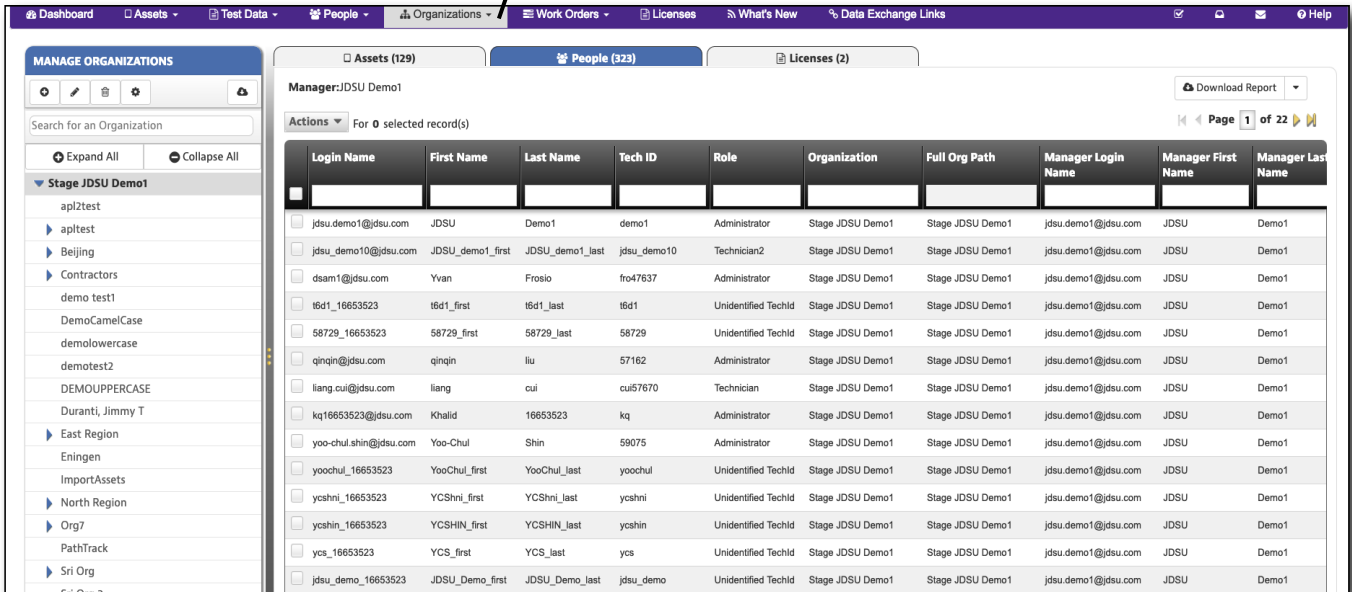
The **Organizations** tab is the hub for all of the organization and suborganization management features of your StrataSync account, including: adding, editing, moving, deleting, and importing organizations.

Click the **Organizations** tab in the Main menu to bring up the Organizations dropdown.



**Organizations dropdown menu**

**Organizations tab**



**Organizations List selected from the Organizations tab**

## Searching and sorting

From the Organization List, you can easily find an asset, person, or license using the search bar under each of the column headers or the sorting filters.

### Searching

You can search by typing into the search bar under a column header. The list updates with the results.

Some of the columns provide dropdowns with relevant options once you start typing.

**Search bar**

Login Name	First Name	Last Name	Tech ID
<input type="text"/>	<input type="text"/>	<input type="text" value="h"/>	<input type="text"/>
<input type="checkbox"/>	east.tech1@jdsu.com	East	5800 tech_last tech1
<input type="checkbox"/>	west.tech1@jdsu.com	West	Abdullah _tech1
<input type="checkbox"/>	south.tech1@jdsu.com	South	Atha h_tech1
<input type="checkbox"/>	north.tech1@jdsu.com	North	Berkshire _tech1
<input type="checkbox"/>	east.tech2@jdsu.com	East	Chapman _tech1
<input type="checkbox"/>			Chwalek _tech1
<input type="checkbox"/>			default tech_last tech2
<input type="checkbox"/>			DemoTech

Although the Organization List doesn't have Views like other lists, the filters work similarly. To remove the filter from the search bar, click the (x) to remove the filter.

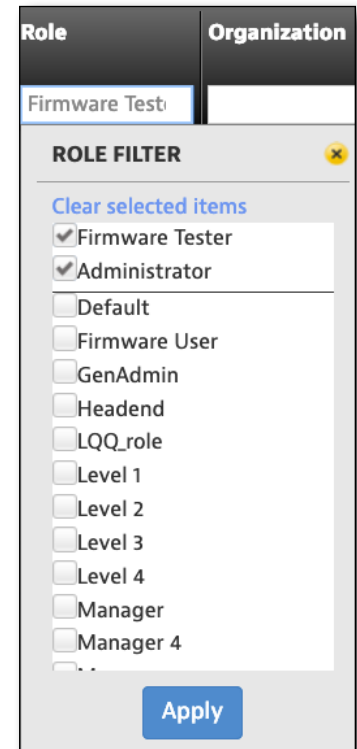
Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name	
<input type="checkbox"/>	jdsu_demo1@jdsu.com	JDSU	Demo1	demo1	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	jdsu_demo10@jdsu.com	JDSU_demo1_first	JDSU_demo1_last	jdsu_demo10	Technician2	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	dsam1@jdsu.com	Yvan	Frosio	fro47637	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	t6d1_16653523	t6d1_first	t6d1_last	t6d1	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	58729_16653523	58729_first	58729_last	58729	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	qinqin@jdsu.com	qinqin	liu	57162	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	liang.cui@jdsu.com	liang	cui	cui57670	Technician	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	kq16653523@jdsu.com	Khalid	16653523	kq	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	yoo-chul.shin@jdsu.com	Yoo-Chul	Shin	59075	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	yoochul_16653523	YooChul_first	YooChul_last	yoochul	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	ycshni_16653523	YCShni_first	YCShni_last	ycshni	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	ycshin_16653523	YCShin_first	YCShin_last	ycshin	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	ycs_16653523	YCS_first	YCS_last	ycs	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
<input type="checkbox"/>	jdsu_demo_16653523	JDSU_Demo_first	JDSU_Demo_last	jdsu_demo	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1

Scroll to the right to reveal more detail, including Manager's Name and Last Login Date.

### Filtering multiple items

The Role column allows you to select multiple items to filter at the same time (e.g. filter Firmware Tester and Admin only). When ready, select **Apply**.

To remove the filter from the search bar, click the (x) to remove the filter.



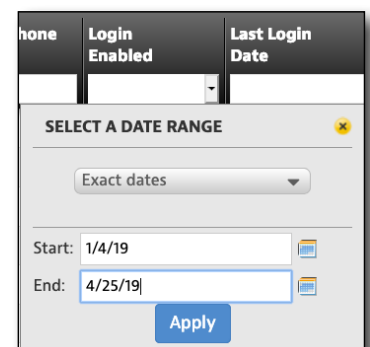
#### NOTE:

**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Last Login Date column allows you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

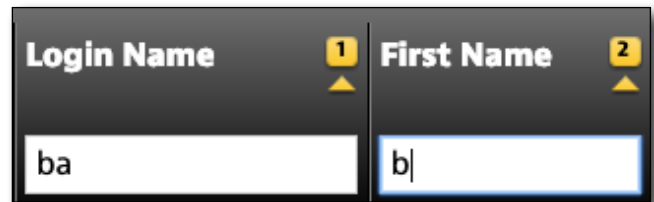
To remove the filter from the search bar, click the (x) to remove the filter.



## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

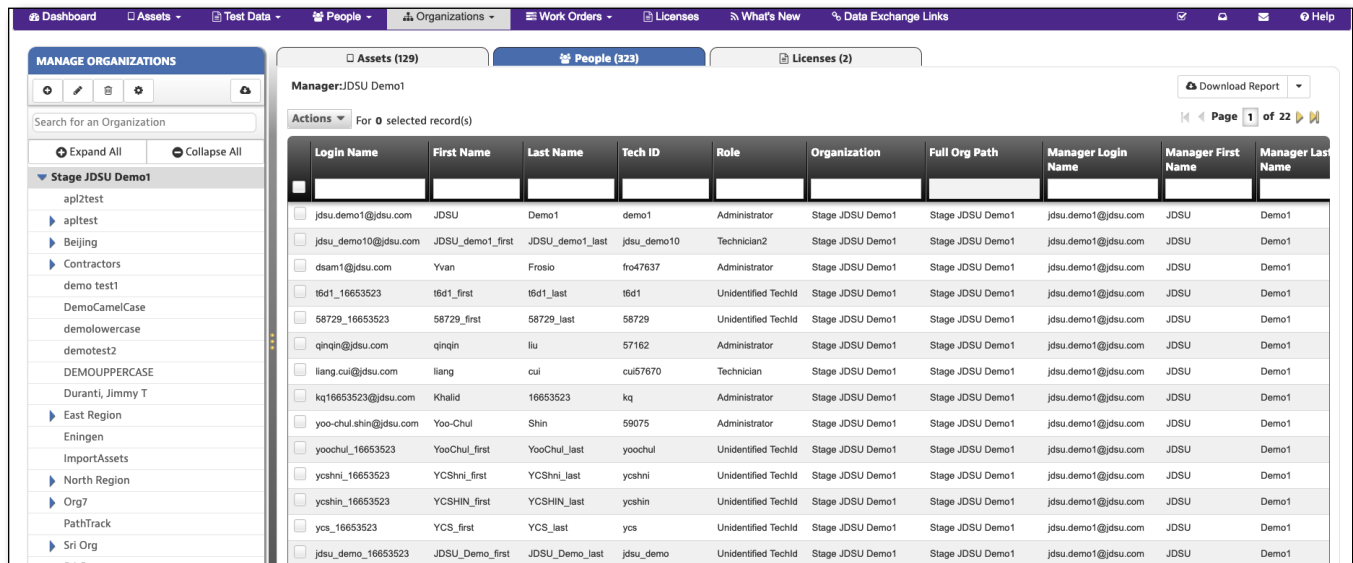


# Organization List

This feature allows you to manage assets, people, licenses, and the organization and any suborganizations as a whole.

Select the **Organizations** tab, and then select **Organization List**. The Organization List screen appears.

Right away, you will notice that the screen is separated into 4 tabs: Manage Organizations, Assets, People, and Licenses.



Organization List, with the People tab selected



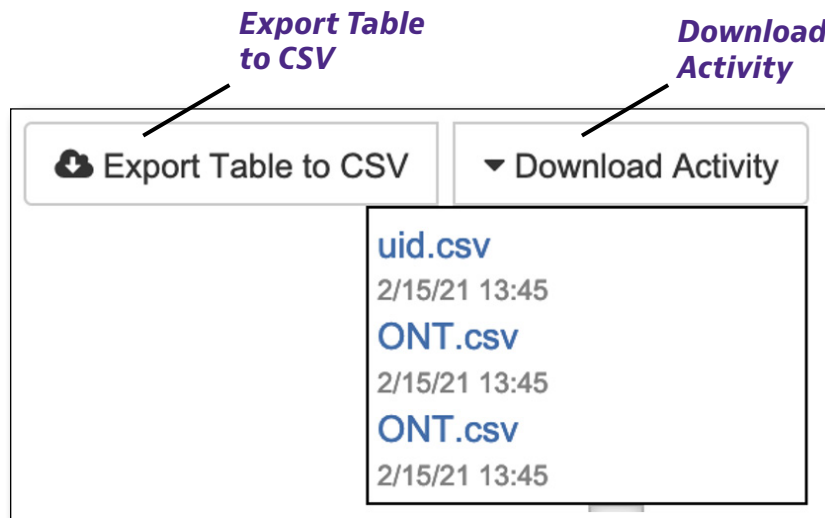
## Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

## Manage Organizations tab

### Adding organizations

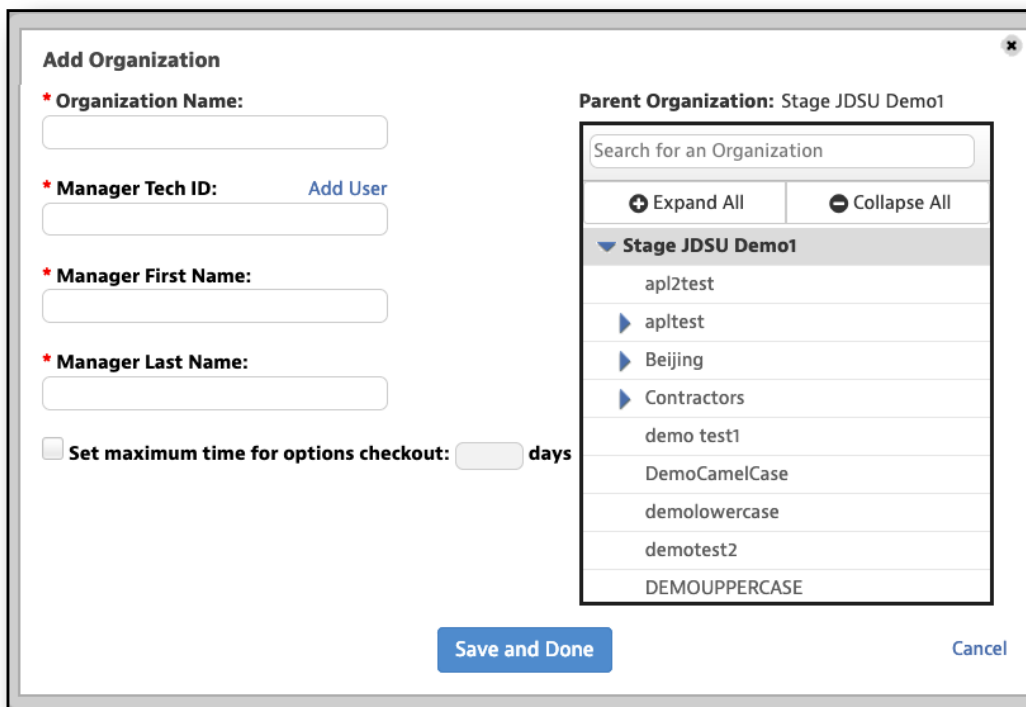
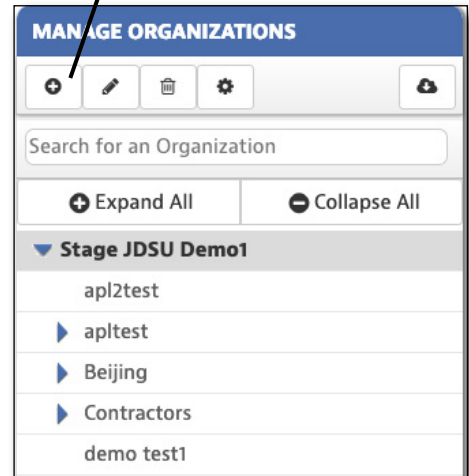
From the Organization List screen, select the **Add** button at the top of the **Manage Organizations** tab. The Add Organization screen is displayed.

On the right, select the parent organization.

Enter the name for the new organization and the manager account name for this org. The name must already be in the system at this point. When done, click **Save and Done**.

The new organization will appear in the list.

### Add Organization

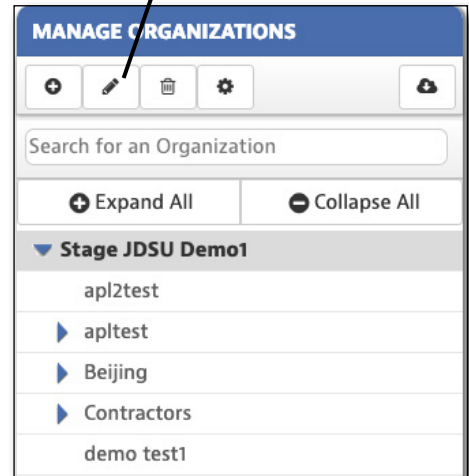


### Editing organizations

From the Organization List screen, select the organization you want to edit under the **Manage Organizations** tab, then select the **Edit** button at the top. The Edit Organization screen is displayed.

Edit the information as needed and click **Save**.

### Edit Organization



#### Edit Organization ✕

**\* Organization Name:**

**\* Manager Tech ID:**

**\* Manager First Name:**

**\* Manager Last Name:**

**Set maximum time for options checkout:**  **days**

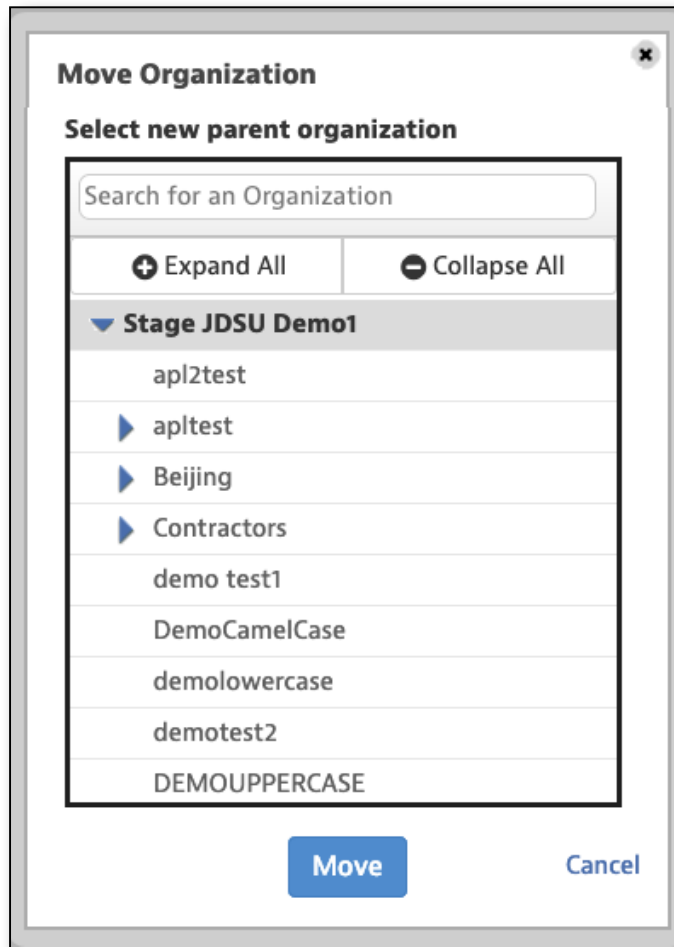
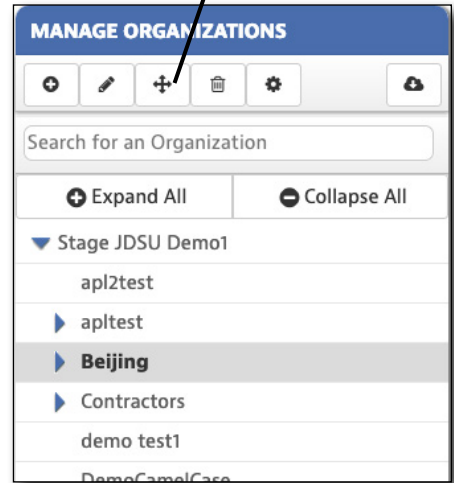
### Moving organizations

With this feature, you can choose a new parent organization for your sub org.

From the Organization List screen, select the organization you want to move under the **Manage Organizations** tab, then select the **Move** button at the top. The Move Organization screen is displayed.

Select the parent organization you want to move it to and click **Move**.

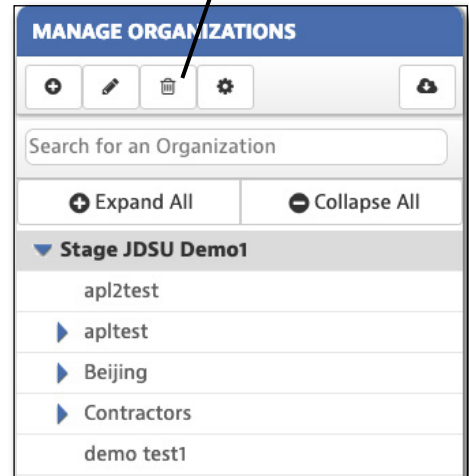
*Move Organization*



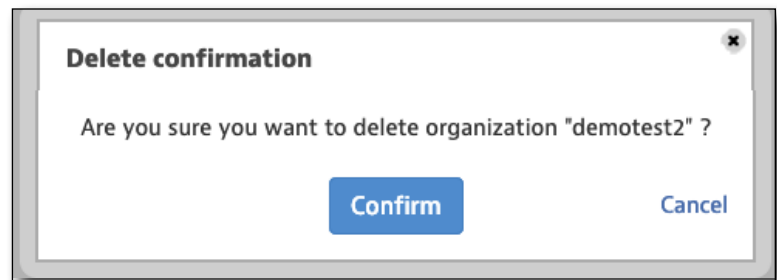
## Deleting organizations

From the Organization List screen, select the organization you want to delete under the **Manage Organizations** tab, then select the **Delete** button at the top.

**Delete Organization**



A confirmation screen asks you to confirm. Click **Confirm**.



### **NOTE:**



**Before deleting an organization, all associated sub organizations, users, assets, and templates must be deleted or moved to other organizations.**

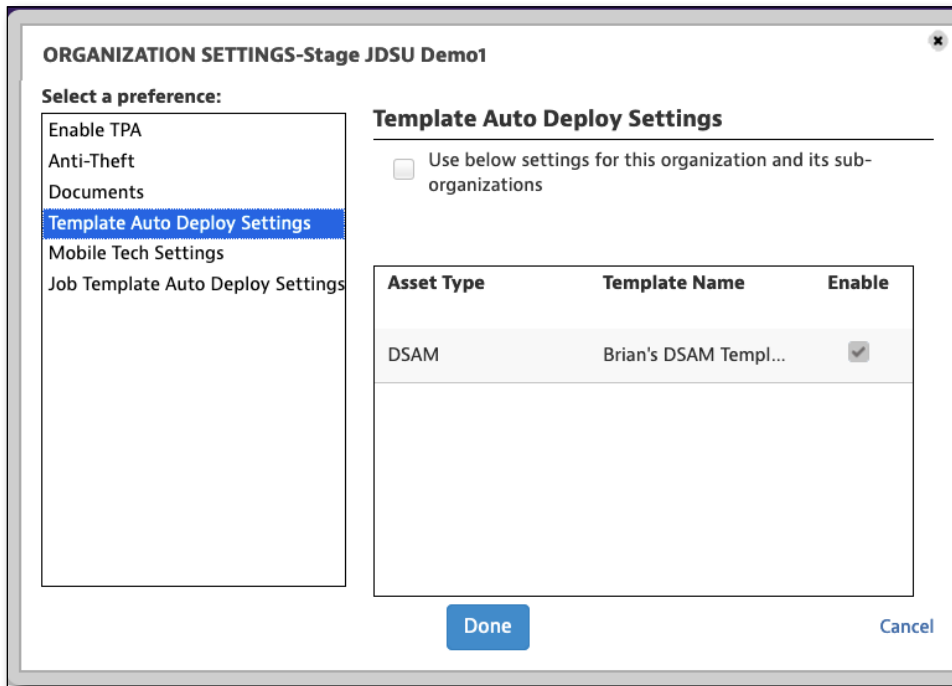
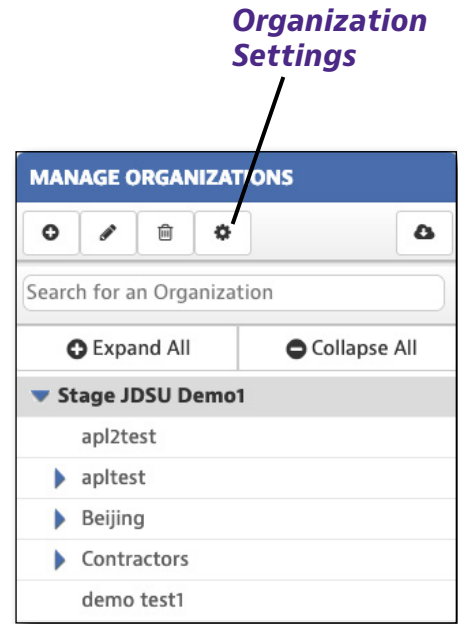
### Organization Settings

This feature allows you to customize your Test Process Automation, anti-theft, documents, template auto deploy, Mobile Tech, and job template auto deploy settings.

This allows you to tailor these settings by asset type instead of using the system settings or parent organization settings.

From the Organization List screen, select the organization you want to edit under the **Manage Organizations** tab, then select the **Organization Settings** button at the top. The Organization Settings screen is displayed.

Edit the information as needed and click **Done**.



**NOTE:**  See the *Test Process Automation User Guide* for details on TPA settings.

**IMPORTANT:**

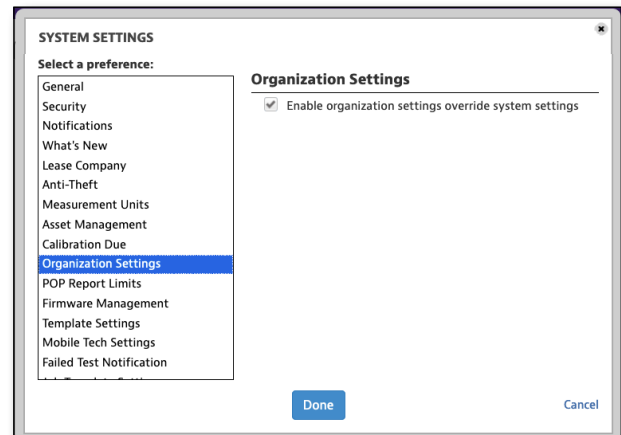
**The parent organization uses system-wide settings. To adjust settings per organization, select another organization or sub-org below the parent organization.**

### Mobile Tech settings and custom documents

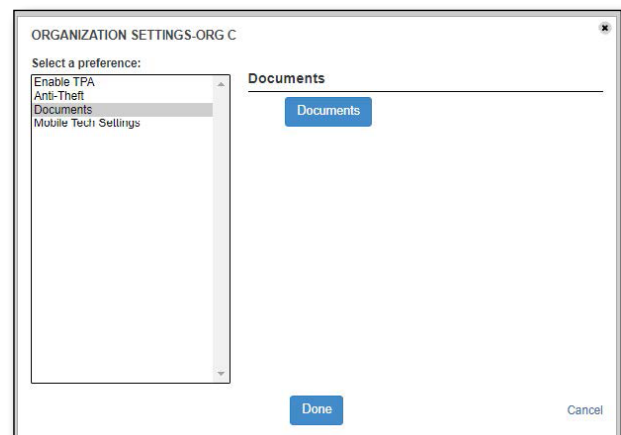
Previously, StrataSync licensed accounts could define centralized settings to control VIAVI Mobile Tech app configuration for thousands of technicians, as well as contain customized documents (e.g. testing methods and procedures guides) technicians could view/download via the Mobile Tech app.

Now, account administrators can define these settings at the per-organization level.

(The **Enable organization settings override system settings** checkbox needs to be checked under **System Settings > Organization Settings**). See ["Organization settings" on page 236](#).

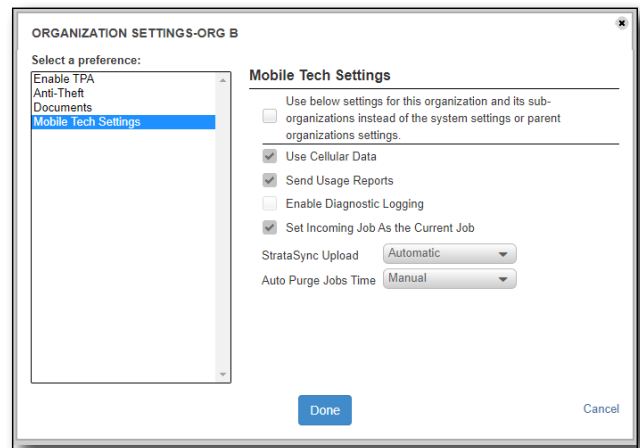


For Custom Documents, any documents uploaded for higher-level organizations will also be available at lower-level organizations, so only upload documents at higher-level orgs that should be accessible for everyone. Upload documents at lower-level orgs to target specific workgroups.



For Mobile Tech Settings, setting **Use below settings for this organization and sub-organization...** at the per-organization level, overrides any settings at a higher-level organization.

The standard mobile tech settings capability (now including per-organization settings) is only supported for customers with non-expired SS-PRO, SS-ANALYTICS or SS-ENT-WRKFLW subscription plans.



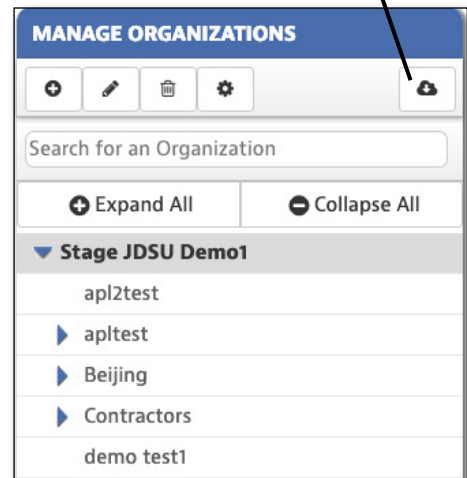


## Downloading organization data

From the Organization List screen, select the organization or suborg you want to download data for under the **Manage Organizations** tab, then select the **Download Organization List** button at the top.

Choose where you want to save the file.

**Download  
Organization List**



## Assets tab

Using the **Assets** tab from the Organization List is similar to details covered previously. See *"Assets" on page 63*.

## People tab

Using the **People** tab from the Organization List is similar to details covered previously. See *"People" on page 137*.

## Licenses tab

Using the **Licenses** tab from the Organization List is similar to details covered later in this guide. See *"Licenses" on page 215*.

Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name
jdsu.demo1@jdsu.com	JDSU	Demo1	demo1	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu.demo1@jdsu.com	JDSU	Demo1
jdsu_demo10@jdsu.com	JDSU_demo1_first	JDSU_demo1_last	jdsu_demo10	Technician2	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
dsam1@jdsu.com	Yvan	Frosio	fro47637	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
tsd1_16653523	tsd1_first	tsd1_last	tsd1	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
58729_16653523	58729_first	58729_last	58729	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
qinqin@jdsu.com	qinqin	liu	57162	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
liang.cui@jdsu.com	liang	cui	cui57670	Technician	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
kq16653523@jdsu.com	Khalid	16653523	kq	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
yoo-chul.shin@jdsu.com	Yoo-Chul	Shin	59075	Administrator	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
yoochul_16653523	YooChul_first	YooChul_last	yoochul	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
ycshni_16653523	YCSHni_first	YCSHni_last	ycshni	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
ycshin_16653523	YCSHIN_first	YCSHIN_last	ycshin	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
yes_16653523	YCS_first	YCS_last	ycs	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1
jdsu_demo_16653523	JDSU_Demo_first	JDSU_Demo_last	jdsu_demo	Unidentified TechId	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1@jdsu.com	JDSU	Demo1

Organization List, with the People tab selected

## Importing organizations

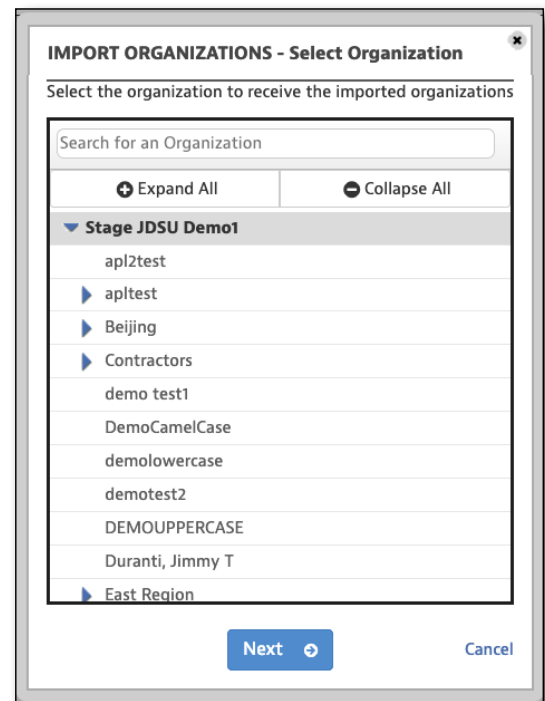
This section details how to import organization hierarchy from a CSV file.

1. Select the **Organizations** tab, and then select **Import Organizations**. The Import Organizations screen appears.
2. Select the parent organization you want to import to, and click **Next**. The Select File screen appears.
3. To download a sample CSV file already formatted for StrataSync, select **Download sample CSV file**.

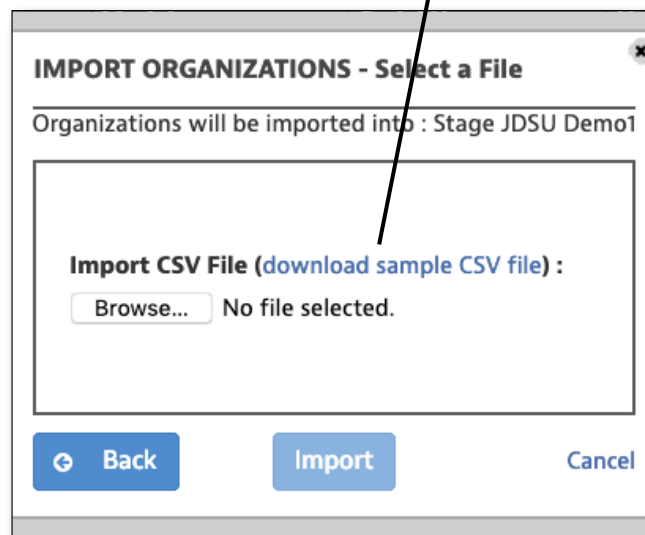
Make sure you retain the header row and enter the data fields starting on row 2. See the sample file for more information.

4. Select **Browse** and choose the file you want to import, then select **Import**.

The organization will be imported into the hierarchy.



### Download sample CSV



## Importing changes for organizations

If you have bulk changes to update for organizations, the steps are similar to importing new organizations.

Edit the CSV as needed, (updating the fields that have changed), and reimport the file as before. This includes organization changes, roles, etc.



## Work Orders

This chapter covers how to use the Work Order Management features of StrataSync, including the following:

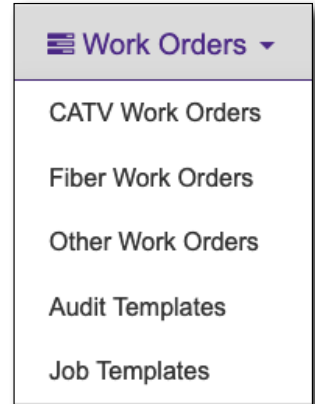
- "Work Orders" on page 190
- "Searching and sorting" on page 191
- "Views" on page 194
- "Importing job templates" on page 204
- "Deploying job templates" on page 206
- "Automatic template deployment and artifact linking" on page 208
- "CATV, Fiber, Other Work Orders, and Audit Templates" on page 213

## Work Orders

The **Work Orders** tab is the hub for all of the work order management features of your StrataSync account for your field instruments, including: CATV, Fiber, Other work orders, Audit templates, and Job templates.

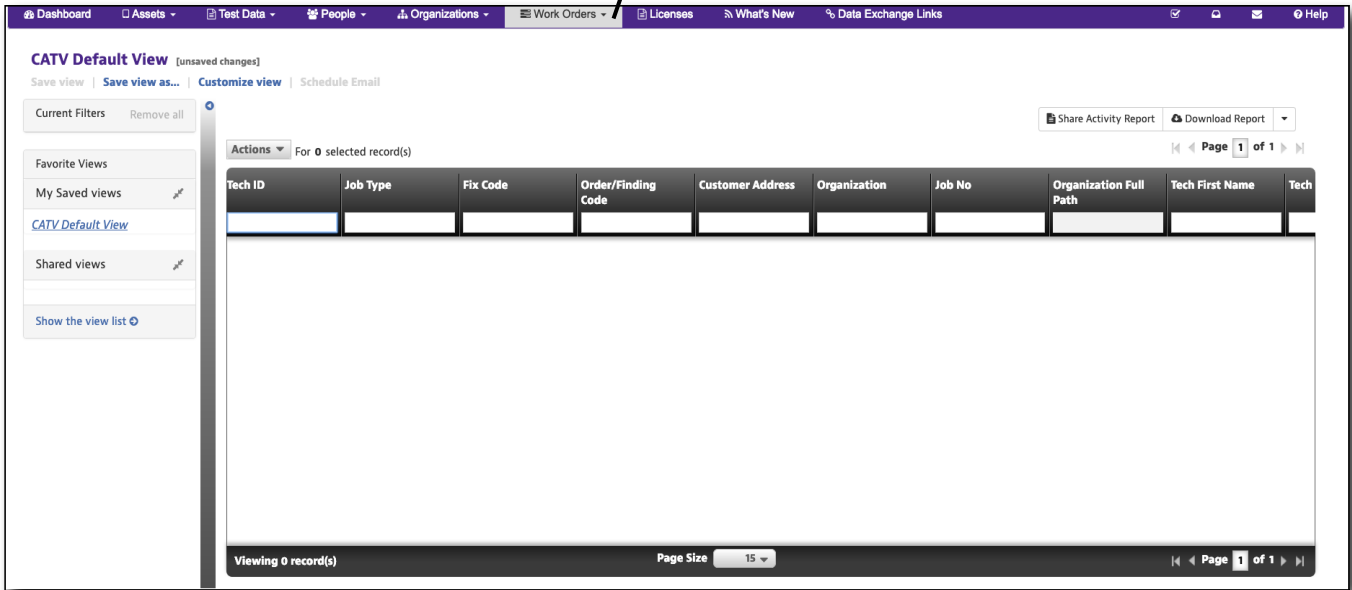
Work order is a term historically (and still) used by customer billing and technician dispatch systems to describe a planned/scheduled appointment, typically for a single technician and typically for service activation or customer site service visit. "Work order" is used by VIAVI for CDM 2.1. See the StrataSync API Guides for details ([Test Results](#) and [Generic Workflow](#)).

Click the **Work Orders** tab in the Main menu to bring up the Work Orders dropdown.



**Work Orders dropdown menu**

**Work Orders tab**



**Work Orders List selected from the Work Orders tab**



**NOTE:**

**The tabs in the Main menu are dependent on the options available for your StrataSync account. See your VIAVI sales representative for more information.**

## Searching and sorting

From the Work Order's CATV, Fiber, Other workorders, and Audit Templates, you can easily find a work order using the search bar under each of the column headers or the sorting filters.

### Searching

You can search by typing into the search bar under a column header. The list updates with the results.

Make sure to include hyphens for product names, etc., (e.g. T-BERD 2000).

Some of the columns provide dropdowns with relevant options once you start typing.

*Search bar*

Asset class	Asset Type	Model	Unique
<input type="checkbox"/>		T-BERD	
<input type="checkbox"/>	Syncable	CellAdvisor CAA	DDE315
<input type="checkbox"/>	Syncable	T-BERD/MTS 2000	T-BERD
<input type="checkbox"/>	Syncable	CellAdvisor CAA	DDE315
<input type="checkbox"/>	Syncable	T-BERD/MTS 8000	T-BERD
<input type="checkbox"/>	Module	T-BERD/MTS module	20PMVFL

*(Note: A dropdown menu is shown under the 'Model' column with options: T-BERD 2000, T-BERD 4000, T-BERD 5800 V2, T-BERD 6000A, T-BERD 6000A V2, T-BERD 8000E)*

The filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Current Filters	Remove all
<input checked="" type="checkbox"/> Model T-BERD	
Favorite Views	
My Saved views	
<a href="#">Default View</a>	

Tech ID	Job Type	Fix Code	Order/Finding Code	Customer Address	Organization	Job No	Organization Full Path	Tech First Name	Tech
Viewing 0 record(s)									

*(Note: The table is currently empty. The text 'Scroll to the right to reveal more detail, including Customer Address and Job Number.' is located below the table.)*

**Scroll to the right to reveal more detail, including Customer Address and Job Number.**

### Filtering multiple items

The Status and Pass/Fail Status columns allow you to select multiple items to filter at the same time (e.g. filter Closed and Rescheduled status only). When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Status	Tested
Closed, Reschedule	

**STATUS FILTER** ✕

[Clear selected items](#)

- Closed
- Rescheduled
- Cancelled
- Completed
- Open

**Apply**

#### NOTE:



**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Scheduled Date and Created Date columns allow you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Scheduled Date	Customer Account No

**SELECT A DATE RANGE** ✕

Exact dates ▼

---

Start: 1/24/19 📅

End: 4/25/19 📅

**Apply**



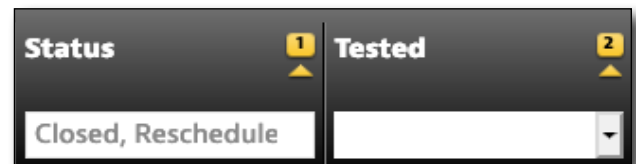
**NOTE:**

**You can save custom filters to a favorite view for easy reference. See "[Saving views](#)" on page 195.**

## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

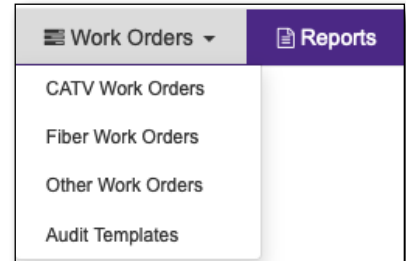


# Views

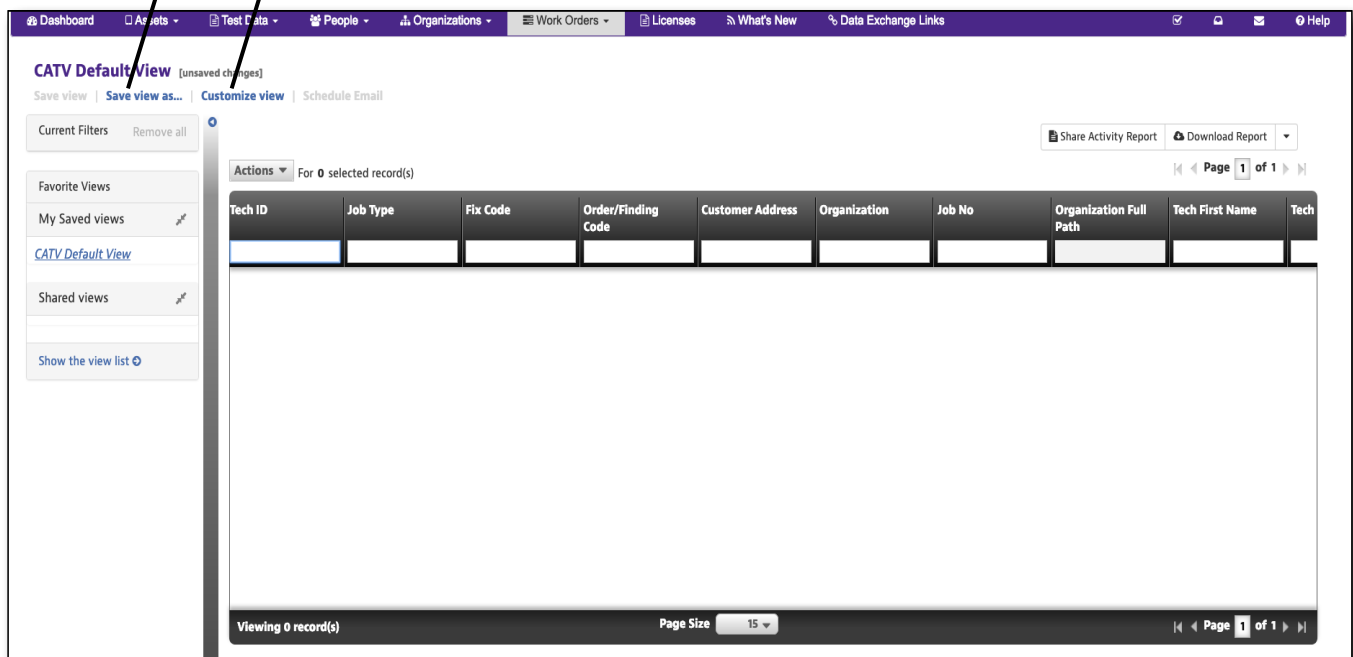
## Customizing views

StrataSync gives you the ability to customize your list views.

1. Select the **Work Orders** tab, and then select **CATV Work Orders**, **Fiber Work Orders**, or **Other Work Orders**.  
The corresponding Work Order List appears.
2. Select **Customize view** at the upper left of the screen.



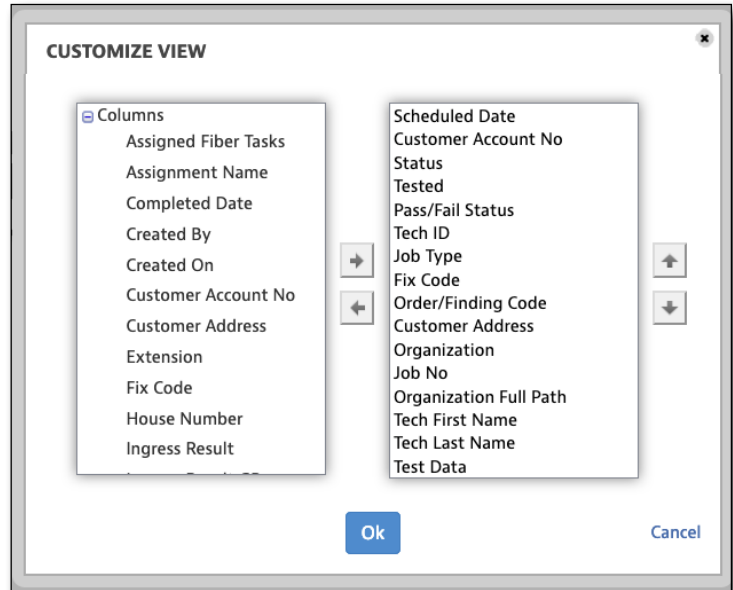
**Save view as**     **Customize view**



**Work Orders Default View**

The Customize View screens appears.

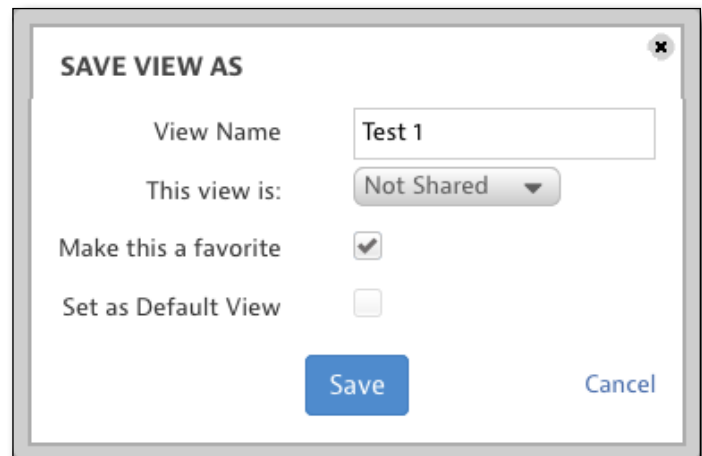
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



## Saving views

- From the Work Orders List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
- Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
- When done, click **Save**.

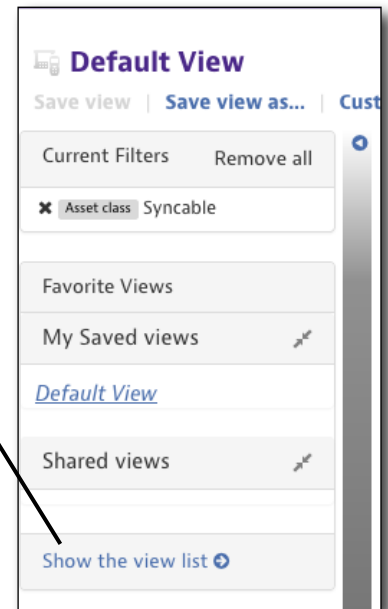
The new view is listed under the Favorite Views section on the left.



## Sharing and editing views

1. From the Work Orders List, select **Show the view list** on the left side of the screen. The Saved and Shared Views screens appears.

*Show the view list*



2. Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
3. When finished, click **Done**.

SAVED AND SHARED VIEWS						
View Name ▼	Created By	Last Modified	Shared	Favorite	Default	Actions
All columns	JDSU Demo1	10/07/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
B Test 1	Barry Howell	01/21/2019	Not Shared ▼	<input type="checkbox"/>	<input type="radio"/>	<a href="#">Rename</a> <a href="#">Delete</a>
Brian's Cal View	JDSU Demo1	10/23/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
Brian's Org View	JDSU Demo1	10/21/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
Brian's View	JDSU Demo1	10/23/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
CellAdvisor Only	JDSU Demo1	10/18/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
DSAM Only	JDSU Demo1	10/18/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
DSAM with 0 sn	JDSU Demo1	05/01/2014	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	
HST-3000 Only	JDSU Demo1	10/18/2013	Shared ▼	<input type="checkbox"/>	<input type="radio"/>	

[Done](#)

**Note:** Once a shared view is created, it cannot be edited. You need to create a new one and delete the old one.

## Work Order List

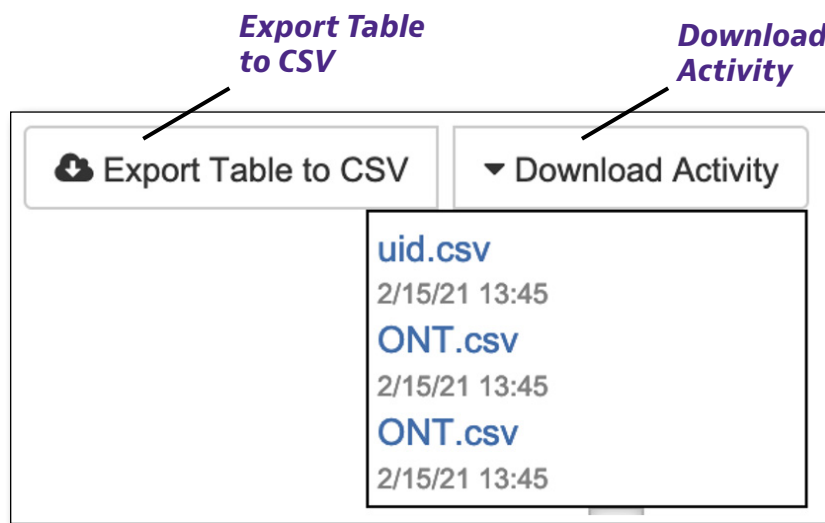
### Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

## Assigning a work order to an organization

Assigning work orders from the Work Order List is similar to how you assign assets from the Holding Bin.

StrataSync supports assigning generic and cable work orders to an organization instead of a technician via the UI. For cable workorders, this is achieved via the **Work Orders > CATV Work Orders** view. For generic workorders of type 'viaviJob', this is achieved via the **Work Orders > Other Work Orders** view. Other work order types are not supported (e.g. 'fiberJob').

This functionality allows a user with the appropriate permissions the ability to assign/re-assign a workorder to an organization which could represent a sub-organization, regional team or even a contractor group – this then allows an admin user within that organization to later assign the work order to one of their technicians. Therefore, this functionality allows hierarchical multi-step workorder assignments from 'higher' organizations (who may not know or have the authority to assign to specific technicians, but know which sub-organization is supposed to complete the work order) to more focused 'lower' organizations (who can assign to individual technicians).

Work orders can also be created initially via the Cable Workflow JSON API (technician assignment-only) or Generic Workflow JSON API (organization or technician assignment), and then reassigned via the UI.

Please note that work orders still require assigning to a technician for deployment to the test instrument.

Also note that the introduction of this functionality is the first time cable work orders can be assigned/re-assigned via the UI to technicians or organizations.

*Assign to me*

The screenshot shows a 'Technician Assignment' dialog box. On the left, there is a list of organizations under the heading 'ORGANIZATIONS'. The 'ZTel' organization is selected. On the right, there is a table titled 'People (2)' showing two technicians. A blue button at the bottom is labeled 'Assign to Organization : ZTel'. A red arrow points from the text 'Assign to me' to the 'Assign to me' link in the top right corner of the dialog.

Tech ID	First Name	Last Name	Login Name	Role	Organization
tech1ztel	Technician	1	tech1@ztel.com	Default	ZTel
tech2ztel	Technician	2	tech2@ztel.com	Default	ZTel

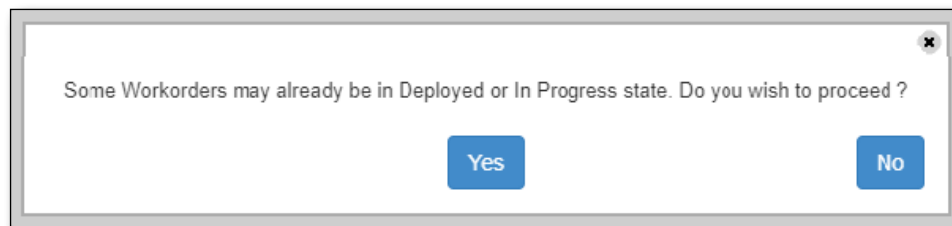
1. From the Work Order List, select a work order (or orders) by clicking the checkbox to the left of the item.
2. Right-click the item (or use the **Action** dropdown) and select **Assign**. The Technician Assignment screen appears.
3. Select the organization and a user, then click the **Assign to Organization** button at the bottom.

When you navigate the organizations section on the left and select a specific organization ("ZTel" in this example), the **Assign** button text changes to reflect the current selection (in this case **Assign to Organization: ZTel**).

You can still assign to technicians by selecting a technician in the currently selected organization, in which case the assignment button text will change to reflect the 'techId' of the selected technician (e.g. **Assign to TechId: 57311**). When you assign a workorder to an organization, the 'State' of the workorder is changed to "STARTED".

If you assign a workorder to a technician, the 'State' of the workorder is changed to "ASSIGNED".

4. Whenever you assign a work order via the UI, a warning popup window will display indicating that by reassigning a work order which is already deployed or in-progress, you will remove that original assignment or reset the workorder compliance if in-progress with already uploaded test results. Select **Yes** to confirm.



**NOTE:**



**You can also assign the work order to yourself by selecting *Assign to me* at the top right corner.**

In the example below, the workorder "JOBMJP7MAYCATV003" has been assigned to an organization and the 'State' has been set to "STARTED". This workorder would require further assignment to a technician before it could be deployed to a test instrument.

Schedule Date	WorkOrder Id	Workflow ID	Type	Type Name	State	Status	Tests Taken	Tech Id	First Name	Last Name	Total Pass	Total
5/11/21	JobMJP11MAYFIBER001	679,425	viavJob		DEPLOYED	Incomplete	0 of 6	mjp008	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV001	677,926	viavJob		DEPLOYED	Incomplete	0 of 1	mjp007	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV002	677,928	viavJob		DEPLOYED	Incomplete	0 of 3	mjp007	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV003	677,932	viavJob		INPROGRESS	Fail	1 of 3	mjp007	Michael	Proctor	0	1
5/10/21	JOBMJP10MAYCATV004	677,936	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JOBMJP10MAYCATV005	677,943	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JobMJP10MAYFIBER001	677,947	viavJob		INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
5/10/21	JobMJP10MAYFIBER002	677,970	viavJob		INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
5/10/21	JOBMJP10MAYCATV006	677,977	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JOBMJP10MAYDSL001	677,981	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2
5/7/21	JOBMJP7MAYCATV003	676,664	viavJob		STARTED		0 of 3				0	0

Users can always review per-work order who/what created the work order via the 'Created By' column (e.g. "APIClient"), as well as the most recent modifier via the 'Modified By' column (e.g. "System" or the username of the user assigning via the UI).

Up to ten work orders can be assigned to an organization at a time. Customers must be licensed for workorder integration to utilize this capability (either ANALYTICS or ENTERPRISE WORKFLOW subscription plans or legacy workorder integration licensing).



## Canceling, re-activating or deleting a work order

This capability allows a user with the appropriate permissions, to cancel workorders of types 'viaviJob' (from the **Work Orders > Other Work Orders** view), and 'fiberJob' and 'swissAssignment' (from the **Work Orders > Fiber Work Orders** view). Canceling a workorder removes all workorder compliance from being performed and allows these workorders to be filtered using the 'State' value of "CANCELLED".

Cancelled workorders can be re-activated, in which case work order compliance is re-run against the current set of associated uploaded test results or can be permanently deleted.

Canceling and re-activating work orders requires the 'Edit Work Orders' permission, and deleting workorders requires the 'Delete Work Orders' permission. See *"Job Management (Previously Work Order Management)\*\*" on page 167.*

Please note these actions can only be performed one work order at a time.

1. From the Work Order List, select the checkbox next to the work order you want to cancel.
2. Right-click the item (or use the **Action** dropdown) and select **Cancel Work Order**.
3. A confirmation screen asks you to confirm. Click **Confirm**.

Once a work order has been cancelled, it can be re-activated or deleted. Right-click the work order (or use the **Action** dropdown) to select those options.

In the example below, the work order "JOBMJP10MAYCATV003" is selected and the **Cancel Workorder** action selected.

Schedule Date	WorkOrder Id	Workflow ID	Type	Type Name	State	Status	Tests Taken	Tech Id	First Name	Last Name	Total Pass	Total
5/11/21	JobMJP11MAYFIBER001	679,425	viaviJob		DEPLOYED	Incomplete	0 of 6	mjp008	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV001	677,926	viaviJob		DEPLOYED	Incomplete	0 of 1	mjp007	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV002	677,928	viaviJob		DEPLOYED	Incomplete	0 of 3	mjp007	Michael	Proctor	0	0
5/10/21	JOBMJP10MAYCATV003	677,932	viaviJob		INPROGRESS	Fail	1 of 3	mjp007	Michael	Proctor	0	1
5/10/21	JOBMJP10MAYCATV004				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JOBMJP10MAYCATV005				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JobMJP10MAYFIBER001				INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
5/10/21	JobMJP10MAYFIBER002				INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
5/10/21	JOBMJP10MAYCATV006				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
5/10/21	JOBMJP10MAYDSL001				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2

The workorder 'State' has been updated to "CANCELLED".

5/10/21	JOBMJP10MAYCATV003	677,932	viaviJob		CANCELLED	Fail	1 of 3	mjp007	Michael	Proctor	0	1
---------	--------------------	---------	----------	--	-----------	------	--------	--------	---------	---------	---	---

By selecting this same cancelled workorder you can select the **Make it Active** action, shown below.

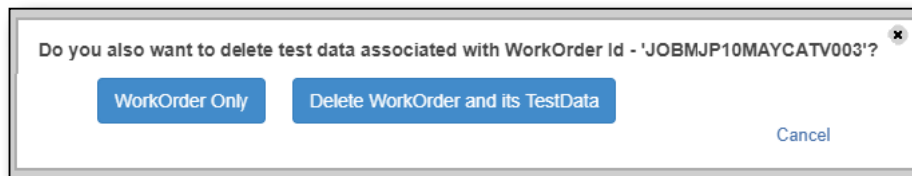
Schedule Date	WorkOrder Id	Workflow ID	Type	Type Name	State	Status	Tests Taken	Tech Id	First Name	Last Name	Total Pass	Tot
<input type="checkbox"/>	5/11/21 JobMJP11MAYFIBER001	679,425	viavJob		DEPLOYED	Incomplete	0 of 6	mjp008	Michael	Proctor	0	0
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV001	677,926	viavJob		DEPLOYED	Incomplete	0 of 1	mjp007	Michael	Proctor	0	0
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV002	677,928	viavJob		DEPLOYED	Incomplete	0 of 3	mjp007	Michael	Proctor	0	0
<input checked="" type="checkbox"/>	5/10/21 JOBMJP10MAYCATV003	677,932	viavJob		CANCELLED	Fail	1 of 3	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	Check All on this Page	TV004	677,936	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	Check All on all Pages	TV005	677,943	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	Uncheck All on this Page	ER001	677,947	viavJob	INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	Uncheck All on all Pages	ER002	677,970	viavJob	INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	Show Test Data	TV006	677,977	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	Show WorkOrder Tests	TV006	677,977	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	Assign	TV006	677,977	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	Make it Active	L001	677,981	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2
<input type="checkbox"/>	Delete	V003	676,664	viavJob	STARTED		0 of 3				0	0

This changes the workorder 'State' back to "INPROGRESS" – please note that the state could change to "COMPLETED" if the technician had subsequently uploaded all necessary test results and/or the other workorder stats like 'Tests Taken' may also be updated when a workorder is made active again.

<input checked="" type="checkbox"/>	5/10/21 JOBMJP10MAYCATV003	677,932	viavJob		INPROGRESS	Fail	1 of 3	mjp007	Michael	Proctor	0	1
-------------------------------------	----------------------------	---------	---------	--	------------	------	--------	--------	---------	---------	---	---

Schedule Date	WorkOrder Id	Workflow ID	Type	Type Name	State	Status	Tests Taken	Tech Id	First Name	Last Name	Total Pass	Tot
<input type="checkbox"/>	5/11/21 JobMJP11MAYFIBER001	679,425	viavJob		DEPLOYED	Incomplete	0 of 6	mjp008	Michael	Proctor	0	0
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV001	677,926	viavJob		DEPLOYED	Incomplete	0 of 1	mjp007	Michael	Proctor	0	0
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV002	677,928	viavJob		DEPLOYED	Incomplete	0 of 3	mjp007	Michael	Proctor	0	0
<input checked="" type="checkbox"/>	5/10/21 JOBMJP10MAYCATV003	677,932	viavJob		CANCELLED	Fail	1 of 3	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV004	677,936	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV005	677,943	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JobMJP10MAYFIBER001	677,947	viavJob		INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JobMJP10MAYFIBER002	677,970	viavJob		INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV006	677,977	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JOBMJP10MAYDLSL001	677,981	viavJob		COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2
<input type="checkbox"/>	5/7/21 JOBMJP7MAYCATV003	676,664	viavJob		STARTED		0 of 3				0	0

A popup window is displayed giving the option to delete just the workorder, or delete the workorder and any associated test results uploaded by that time.



Depending on which option is selected, an appropriate confirmation message is displayed.

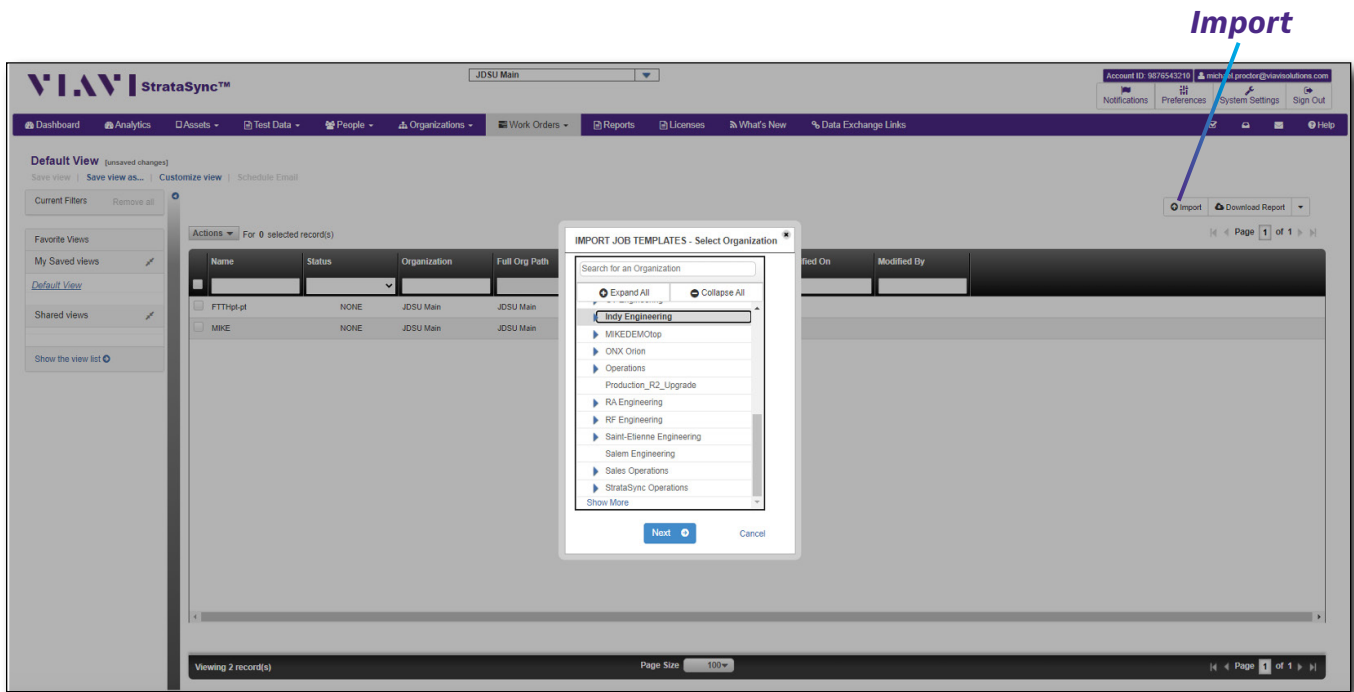


Customers must be licensed for workorder integration to utilize this capability (either ANALYTICS or ENTERPRISE WORKFLOW subscription plans or legacy workorder integration licensing).

## Importing job templates

This section details how to import CDM 2.1-compatible job templates from a JSON file. A job template is associated to an organization and can only be deployed to assets that belong to that organization and its sub-organizations.

1. Select the **Work Orders** tab. From the dropdown, choose **Job Templates**. The Template List screen appears.
2. On the right side, select **Import**. The Import Job Templates screens appears.



### Job template import

3. Select the organization, then click **Next**.
4. Select **Browse** and choose the file you want to import, then select **Import**.

The job template will be imported into the Job Templates List.

If you want to replace job templates with the same name, select the **Override Job Templates with same name** checkbox.



**NOTE:**



***For templates used in Test Process Automation, you may want to name CDM 2.2 templates differently than those used for CDM 2.1. See the [TPA User Guide](#) for more details.***

## Deploying job templates

To deploy a job template, right-click the template on any menu and select **Deploy** from the dropdown (or use the **Actions** menu). The Deploy Select Assests screen is displayed.

The screenshot shows the StrataSync Work Orders interface. At the top, there is a navigation bar with various menu items like Dashboard, Analytics, Assets, Test Data, People, Organizations, Work Orders, Reports, Licenses, What's New, and Data Exchange Links. Below the navigation bar, there is a 'Default View' section with options to save or customize the view. A table of job templates is displayed, with columns for Name, Status, Organization, Full Org Path, Created On, Created By, Modified On, and Modified By. The 'ONXS80 Install' row is selected, and a context menu is open over it, showing options like 'Check All on this Page', 'Check All on all Pages', 'Uncheck All on this Page', 'Uncheck All on all Pages', 'Download', 'Rename', 'Delete', 'Deploy', and 'Auto Deploy Settings'. The 'Deploy' option is highlighted.

Name	Status	Organization	Full Org Path	Created On	Created By	Modified On	Modified By
MIKE	NONE	Stage JDSU Demo1	Stage JDSU Demo1	11/19/20	michael.proctor@stagede...		
ONX-DSLmike	NONE	ZTel	Stage JDSU Demo1.ZTel	4/21/21	michael.proctor@stagede...	5/6/21	michael.proctor@ne...
ONXS80 Install	NONE	Stage JDSU Demo1	Stage JDSU Demo1	5/6/21	michael.proctor@newsta...		
ONX CATV Install	NONE	Stage JDSU Demo1	Stage JDSU Demo1	5/7/21	michael.proctor@newsta...		
BigNet-09	NONE	Stage JDSU Demo1	Stage JDSU Demo1	7/6/21	anton.beschta@stagede...		
BigNet-08	NONE	Stage JDSU Demo1	Stage JDSU Demo1	7/6/21	anton.beschta@stagede...		

### Job Templates list

**Important:** Importing a job template to a specific organization within a StrataSync customer account will automatically enable visibility of that template to all VIAMI Mobile Tech app users associated with that organization or sub-organization (or that have visibility permissions).

So importing a job template implicitly 'deploys' it based on techId association to an organization for use with Mobile Tech—this doesn't prevent an admin deploying the job template specifically to assets, but could be used instead of this method if all techs connected their instruments via Mobile Tech.

This supports 1 intended and one 'side-effect' use-case:

Job templates intended for multi-instrument type usage and instruments typically managed via Mobile Tech can be implicitly deployed based on Tech ID association to organization.

Even single-instrument type job templates can be 'deployed' to Mobile Tech by simply uploading them to a specific directory. Providing technicians connect their instrument to Mobile Tech, they can use the template on Mobile Tech to create jobs to share with the instrument. This alleviates an admin from having to specifically deploy job templates to specific assets/instruments.

Select the assets where you want to deploy the selected template. When done, click **Next**.

**Deploy job template - select assets**

Include Holding Bin Assets  
You selected **MIKE** job template. Assets assigned to this template have been preselected.

Actions For 0 selected record(s) Page 1 of 820

Asset No	Asset Type	Unique ID	Serial No	Organization	Job Template	Job Template Status	Tech First Name	Tech Last Name
<input type="checkbox"/>	Optimeter	Optimeter_45217	45217	Stage JDSU Demo1			Rodney	Weaver
<input type="checkbox"/>	Optimeter	Optimeter_45218	45218	West			Atlicus	Finch
<input type="checkbox"/>	NSC	RRSP0070310067	RRSP0070310067	Stage JDSU Demo1			JDSU	Demo1
<input type="checkbox"/>	NSC	RRSP0063500244	RRSP0063500244	Stage JDSU Demo1			Barry	Howell
<input type="checkbox"/>	NSC	RRSP0035190320	RRSP0035190320	Stage JDSU Demo1			Anton	Beschta
<input type="checkbox"/>	NSC	RRSP0071110267	RRSP0071110267	Stage JDSU Demo1			Michael	Proctor
<input type="checkbox"/>	SmartClass TPS	000000654321	000000654321	Stage JDSU Demo1			58729_frst	58729_last
<input type="checkbox"/>	DSAM	3021451	3021451	East Region			jon	doe
<input type="checkbox"/>	DSAM	0020451	0020451	Stage JDSU Demo1			JDSU	Demo1
<input type="checkbox"/>	SmartClass TPS	000000654321	000000654321	Stage JDSU Demo1			JDSU	Demo1
<input type="checkbox"/>	T-BERDMTS 6000A	MTS 6000A_31407	31407	Stage JDSU Demo1			JDSU	Demo1
<input type="checkbox"/>	FiberChek	OLP-82P_0123456...	0123456789	Stage JDSU Demo1			JDSU	Demo1
<input type="checkbox"/>	T-BERDMTS 6000...	T-BERD 6000A V2...	1038	Beijing			jdsu	demo1
<input type="checkbox"/>	CellAdvisor CAA	SHIN1234	SHIN1234	Stage JDSU Demo1			YCSHni_frst	YCSHni_last
<input type="checkbox"/>	T-BERDMTS 6000A	T-BERD 6000A_30...	30470	Beijing			jdsu	demo1

Viewing 12289 record(s) Page Size 15 Page 1 of 820

Next Cancel

A confirmation screen will ask if you want to deploy the template. Click **Yes** to confirm.

The template will be deployed to the assets on the next sync.

**DEPLOY TEMPLATE**

You are deploying this template to 1 assets?

Name: ONX CATV Install

Press Yes button to proceed

Back Yes Cancel

## Automatic template deployment and artifact linking

### Key points

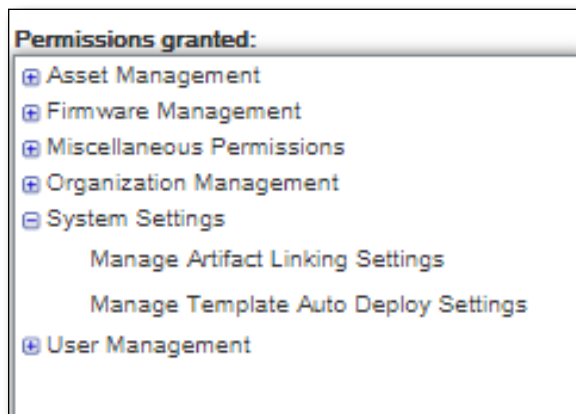
- Templates may be automatically deployed to assets when the template's artifacts have been changed.
- Automatic template deployment is selectable by organization.
- System level permissions are required to enable this capability.
- Users of automatic template deployment should fully understand the organization and template structure of the entire StrataSync account.
- Automatic template deployment is turned off by default.

### Steps

1. Verify the system permissions
2. Enable template auto deployment
3. Link artifacts
4. Run template reports for verification

### Setting permissions

Set the permissions as needed under **System Settings** for the appropriate role and user. For details, see *"Managing user roles" on page 161*.



**Manage Artifact Linking Settings** – Allows you to turn on/off artifact linking from Global Archive or templates to other templates

The **Enable Configuration Artifact Link from Global Archive or Templates** checkbox in **System Settings > Template Settings** is visible to users with this permission.

**Manage Template Auto Deploy Settings** – Allows you to turn on/off Template auto deploy settings for the whole StrataSync account

The **Enable Template Auto Deploy** checkbox in **System Settings > Template Settings** is visible to users with this permission.



## Template settings

Select **System Settings > Template Settings** to bring up the Template Settings section.

For more details, see *"Configuration" on page 228*.

This feature allows you to enable configuration template auto deployment and if configuration artifacts link from the Global Archive or templates.

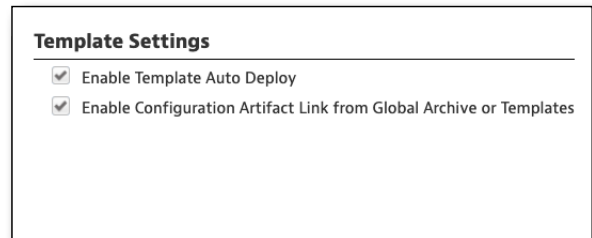
Choose from these options:

- **Enable Template Auto Deploy** – Auto deploy templates to assets in an organization and its suborgs you have set up for specific asset types
- **Enable Configuration Artifact Link from Global Archive or Templates** – Allow parent and child artifact links to be synchronized when changes are made

See *"Artifact linking" on page 109*.

When finished, click **Done**.

For more detailed information on auto template deployment and artifact linking, contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com).



## Organization settings

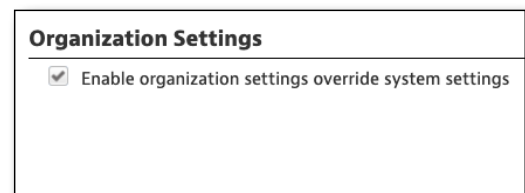
Select **System Settings > Organization Settings** to bring up the Organization Settings section.

For more details, see *"Configuration" on page 228*.

This feature allows suborg owners to set some of the system settings for their own organizations.

When finished, click **Done**.

**Note:** To auto deploy a template to an organization, the template should be located at the selected organization level or above.



## Auto deploy settings

You can set up auto deploy settings for any job template. Right-click the template on any menu and select **Auto Deploy Settings** from the dropdown (or use the **Actions** menu). The Auto Deploy Settings screen is displayed.

Bulk Job Template auto-deploy set up is allowed only if all assets belong to the same organization, otherwise this has to be set up with each job template, one at a time.

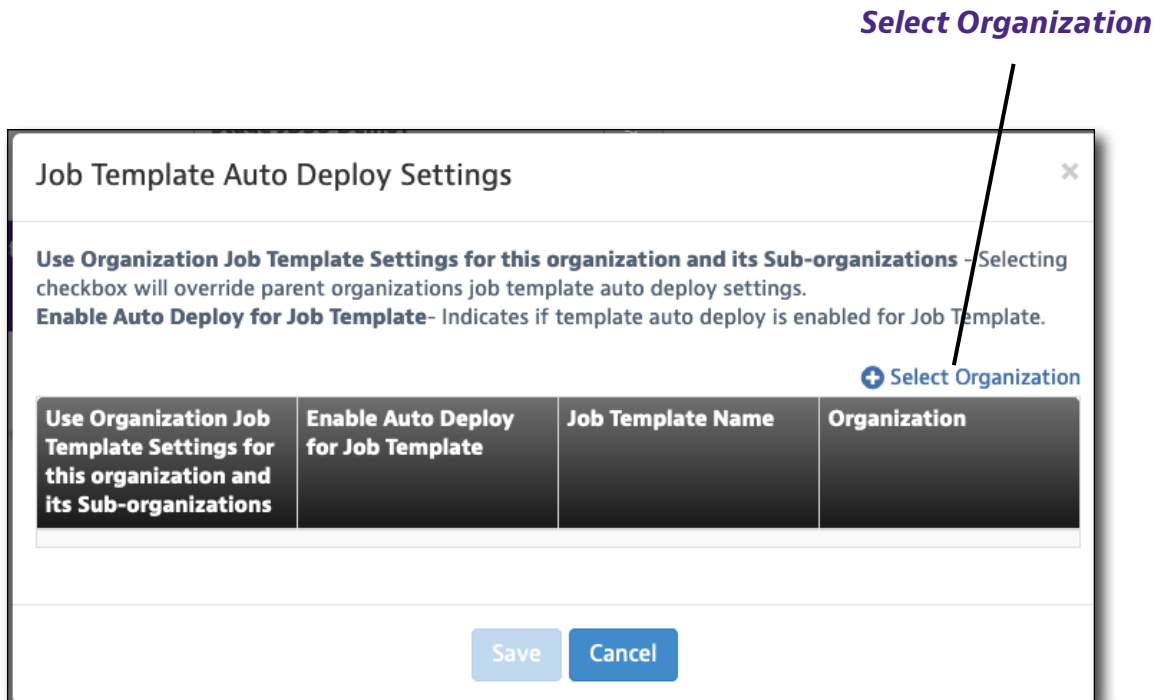
When an organization is participating in auto-deploy of job templates, StrataSync makes sure each asset will have templates that are set up for auto-deploy. If an asset uploads a job template that is not participating in auto-deploy then StrataSync will issue all auto-deploy templates. This will remove any unwanted job templates that are not part of auto-deploy.

The options are:

- **Use Organization Template Settings for this organization and its Sub-organizations** – Allows you to override the parent organization's template auto deploy settings
- **Enable Auto Deploy for Job Template** – Allows you to set whether auto deploy is enabled for the selected job template
- **Job Template Name**

Click **Select Organization** at the top to add more organizations, as needed.

When done, click **Save**.



**Notes:**

- Select both check boxes to override parent organization settings and enable auto-deploy for asset type.
- Both check boxes need to be checked to enable templates to be auto deployed
- For sub-organizations, if one of the checkboxes is not checked then the parent organizations will determine the template to be auto deployed.

***Example of templates to auto deploy to an asset in organization***

Consider the following organization hierarchy:

**VIAVI**

- **California**
  - **San Jose**
- **Indiana**
  - **Indianapolis**

Template A has been set up for auto-deploy for the full VIAVI organization.

Template B has been set up for auto-deploy for the California organization.

All assets in California and its sub-organizations i.e.; San Jose will always get Template B when modifications are made to Template B.

All assets in VIAVI and Indianapolis will always get Template A when modifications are made to Template A.

***Templates will be auto deployed to assets when:***

- When an asset is created in an organization using **Asset Import** or using **Assets Tab > Add a new asset**
- When an asset is created on a StrataSync sync
- When an asset moves into an organization because of a re-assign to another technician
- When a template is renamed
- When a new template configuration artifact is added to the template
- When a template configuration such as limit plan is renamed
- When a template configuration such as limit plan is modified
- When a template configuration is deleted from template section with a "match" policy
- When modifying a configuration such as limit plan that this template configuration is linked to –(only If archive linking is enabled)
- When asset syncs, StrataSync will check if the updated configuration type e.g. channel plan, is part of template used for asset organization auto deploy settings

- If policy on configuration section is "match" it will re-deploy template
- If policy on configuration section is "not match" then it will not re-deploy template

***Templates will not be auto deployed to assets when:***

- When **System Settings > Template Settings > Enable Template Auto Deploy** check box is not checked
- When an asset is not associated with auto-deploy template. Note, this can occur for the following reasons:
  - The configuration is edited via asset itself through **Asset Details->View Configuration**.
  - A Global Archive component is deployed directly to an asset
  - Another template is deployed to an asset which is not same as template chosen for auto-deploy template for asset organization or parent

## CATV, Fiber, Other Work Orders, and Audit Templates

These features are covered in detail in other documents. Contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com) for additional information.



# Licenses

This chapter covers how to use the License Management features of StrataSync, including the following:

- "Licenses" on page 216
- "Searching and sorting" on page 219
- "Views" on page 222
- "Software option licensing" on page 225

# Licenses

The **Licenses** tab is the hub for all of the license management features of your StrataSync account, including all software options for your field instruments.

The Licenses menu also shows any optional StrataSync entitlements, including: test data API, data retention, workflow, and reporting, etc.

Click the **Licenses** tab in the Main menu to bring up the Licenses menu.

*Licenses tab*

License Type	Organization	Full Org Path	Expiration Date	Available Data	Total Data	Customer PO#
Plus	JDSU Main	JDSU Main	3/24/18	2,777.25 M	3,000 M	Retention_Per_Rick
API Access	JDSU Main	JDSU Main	9/18/18	2,548.005 M	3,000 M	RaviTest
API Access	GT Engineering	JDSU Main.GT Engineering	3/10/17	1,487.326 M	2,000 M	Steven Wendling
Plus	JDSU Main	JDSU Main	1/16/21	0 M	3,000 M	fy011618-2
Test Data Exchange	JDSU Main	JDSU Main	12/8/19	2,991.696 M	3,000 M	w1
Reports	JDSU Main	JDSU Main	8/5/20	3,000 M	3,000 M	int
Plus	StrataSync Operations	JDSU Main.StrataSync Operat...	11/11/21	3,000 M	3,000 M	test
API Access	JDSU Main	JDSU Main	11/15/22	9,981.986 M	10,000 M	internal use
Test Data Exchange	JDSU Main	JDSU Main	11/15/21	5,000 M	5,000 M	int2
Test Data Exchange	JDSU Main	JDSU Main	3/6/19	2,948.772 M	3,000 M	int
API Access	JDSU Main	JDSU Main	9/29/19	4,994.348 M	5,000 M	PO_20180929_5GB
Reports	JDSU Main	JDSU Main	11/15/21	3,000 M	3,000 M	INT3
Work Order Exchange	JDSU Main	JDSU Main	12/8/21	3,000 M	3,000 M	w1

**Licenses List**



## Subscription and support plans

StrataSync subscription plans, options, and support plans provide a consistent, scalable pricing model providing primary asset and test results management capabilities at no cost, while offering value-based additional features associated with annual subscription plans priced per-instrument.

Existing customers with legacy licenses have been migrated to the new plans and codes automatically.

The following table summarizes the updated subscription plans, subscription options, and support options available. Please contact your VIAVI sales representative for more details.

Features	Subscription Plans				Support Plans	
	BASE	PRO	ANALYTICS	ENTERPRISE Workflow	Direct Test Results Server Upload	Automated App-to-App
Typical customer	Subcontractors		Contractors Smaller Telcos/CATV providers	Prime Contractors, Tier 1 Telcos/CATV providers	Tier 1 Telcos/CATV providers	
Capability Summary	Free	Manual Workflow	+ Data Insights	+ Automated Workflow	Test Results Upload	Automated Workflow
License codes		SS-PRO-1YR SS-PRO-2YR SS-PRO-3YR	SS-ANALYTICS-1YR SS-ANALYTICS-2YR SS-ANALYTICS-3YR	SS-ENT-WRKFLW-1YR SS-ENT-WRKFLW-2YR SS-ENT-WRKFLW-3YR	SS-MT-SVRUPLD-SUPP-1YR	SS-MT-A2AIF-SUPP-1YR
StrataSync Tech Support	SS-SUPT-1YR available for T3 support	Standard Business Hours			Standard Business Hours	
Asset Management	Standard	Advanced			Dependent on StrataSync Subscription Plan	
Test Results Management	Standard	Advanced				
Test Data Retention	35 days	1 year <i>Extended Test Data Retention Subscription Options:</i> SS-TR2-1YR SS-TR3-1YR				
Job Management Dashboards		Standard	Advanced			
APIs		Available default dashboards				
		<i>Test Results API Subscription Options:</i> SS-TR-API-1YR SS-TR-API-2YR SS-TR-API-3YR		Test Results & Workflow APIs	VIAVI Mobile Tech app HTTPS test results file upload to customer web server	VIAVI Mobile Tech app-to-customer app interfaces for test data transfer and job deployment
Recommended Professional Svcs		1 FAE Day (+ 2 FAE Days for Test Results API option)	3 FAE Days	7 FAE Days	2 FAE Days	5 FAE Days

### Subscription and Support Plans, with new license codes

The existing Licenses List view now supports these new license codes, makes the **Catalog Number** column a default displayed column, and introduces two new default columns, **# of Instruments** and **Expiry Notification Emails**. See the screenshot below for an example.

See "[Customizing views](#)" on page 222 to show the columns, as needed.

License Type	Organizat...	Full Org Path	Expiration Date	Expiry Notification Emails	Available Data	Total Data	Data Retention	Customer PO#	Catalog Number	# of Instruments
			11/1/21 - 12							
Plus	JDSU	JDSU	02/25/2022		0 M	3,000 M	2000	sdf		
Subscription Plan	suborg	JDSU.Mike_Test.suborg	10/29/2022				0	mike29oct2021	SS-PRO-1YR	100
Subscription Plan	MJP	JDSU.MJP	11/22/2022				365	98714361	SS-ANALYTICS-1YR	100
Subscription Plan	MJP	JDSU.MJP	11/25/2021	michael.proctor@viavisolutions.com			365	mikeptest456	SS-PRO-1YR	10
Subscription Option	MJP	JDSU.MJP	11/22/2022				365	37804103	SS-TR-API-1YR	100

### New licensing and expiry detail in Licenses List view

#### **Expiry notifications**

The new license codes additionally support expiry notification emails per-subscription plan/subscription option/support plan license. They are configured by default, so please inform your VIAVI sales representative at the time of order if you do not want to receive these notifications. Expiry notification emails are sent at:

- 3 months prior to the expiry date
- 2 months prior to the expiry date
- 1 month prior to the expiry date
- Every week thereafter until the expiry date

By default, the email used is associated to the manager of the organization which holds the license so it is important that the manager is a user profile with a valid email address.

In addition, at the time of ordering, customers can provide additional email addresses for notification purposes – it is recommended that these email addresses are email groups, not individual email addresses, e.g. "purchasing@customerdomain.com".

Any additional emails provided can be viewed in the **Expiry Notification Emails** column. Please contact VIAVI TAC to modify these emails or to stop expiry notification emails for one or more specific licenses.

## Searching and sorting

From the Licenses List, you can easily find a license using the search bar under each of the column headers or the sorting filters.

### Searching

You can search by typing into the search bar under a column header. The list updates with the results.

Some of the columns provide dropdowns with relevant options once you start typing.

*Search bar*

License Type	Organization	Full Org Path
	e	
API Access	<input type="checkbox"/> North Region <input type="checkbox"/> Stage JDSU Demo1	Stage JDSU Demo1
API Access	North Region	Stage JDSU Demo1.North Re...
Plus	Stage JDSU Demo1	Stage JDSU Demo1

The filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

Current Filters	Remove all
<input checked="" type="checkbox"/> Model T-BERD	
Favorite Views	
My Saved views	
<a href="#">Default View</a>	

The screenshot shows the 'Licenses List' interface. On the left, there is a sidebar with 'Current Filters' (Organization: e), 'Favorite Views', 'My Saved views', and 'Default View'. The main area displays a table with the following columns: License Type, Organization, Full Org Path, Expiration Date, Available Data, Total Data, Data Retention, and Customer PO#. The table contains three rows of data.

License Type	Organization	Full Org Path	Expiration Date	Available Data	Total Data	Data Retention	Customer PO#
API Access	Stage JDSU Demo1	Stage JDSU Demo1	11/28/2019	49,568.421 M	51,200 M	0	R1
API Access	North Region	Stage JDSU Demo1.North Re...	11/25/2019	0 M	3,000 M	0	d
Plus	Stage JDSU Demo1	Stage JDSU Demo1	04/30/2022	854.771 M	3,000 M	9999	PO1a

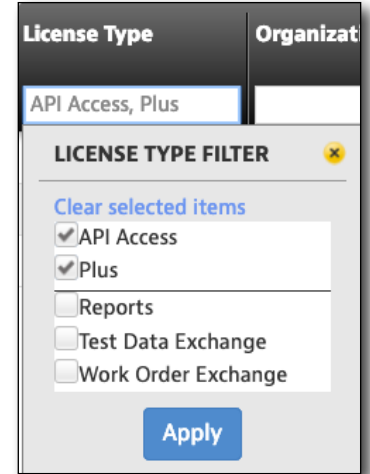
At the bottom of the table, it says 'Viewing 3 record(s)'. The page size is set to 15, and it is Page 1 of 1.

### Licenses List

### Filtering multiple items

The Expiration Date column allows you to select multiple items to filter at the same time (e.g. filter API Access and Plus license types only). When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



#### NOTE:

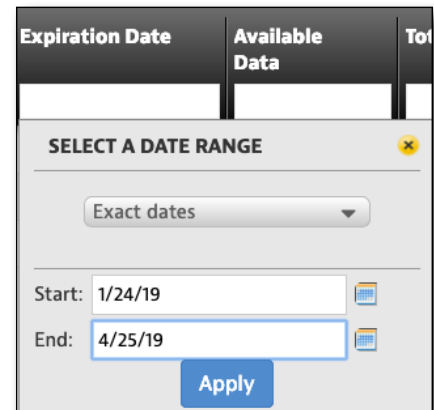


**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### Date filters

The Expiration Date column allows you to use the dropdown or calendars to filter by date or date range. Click the search box to bring up the date filter dropdown. When ready, select **Apply**.

Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.

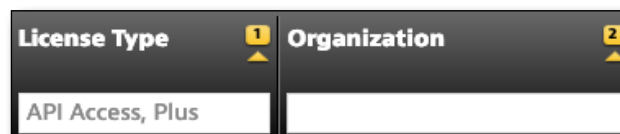


**NOTE:**

**You can save custom filters to a favorite view for easy reference. See *"Saving views"* on page 223.**

## Sorting

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.



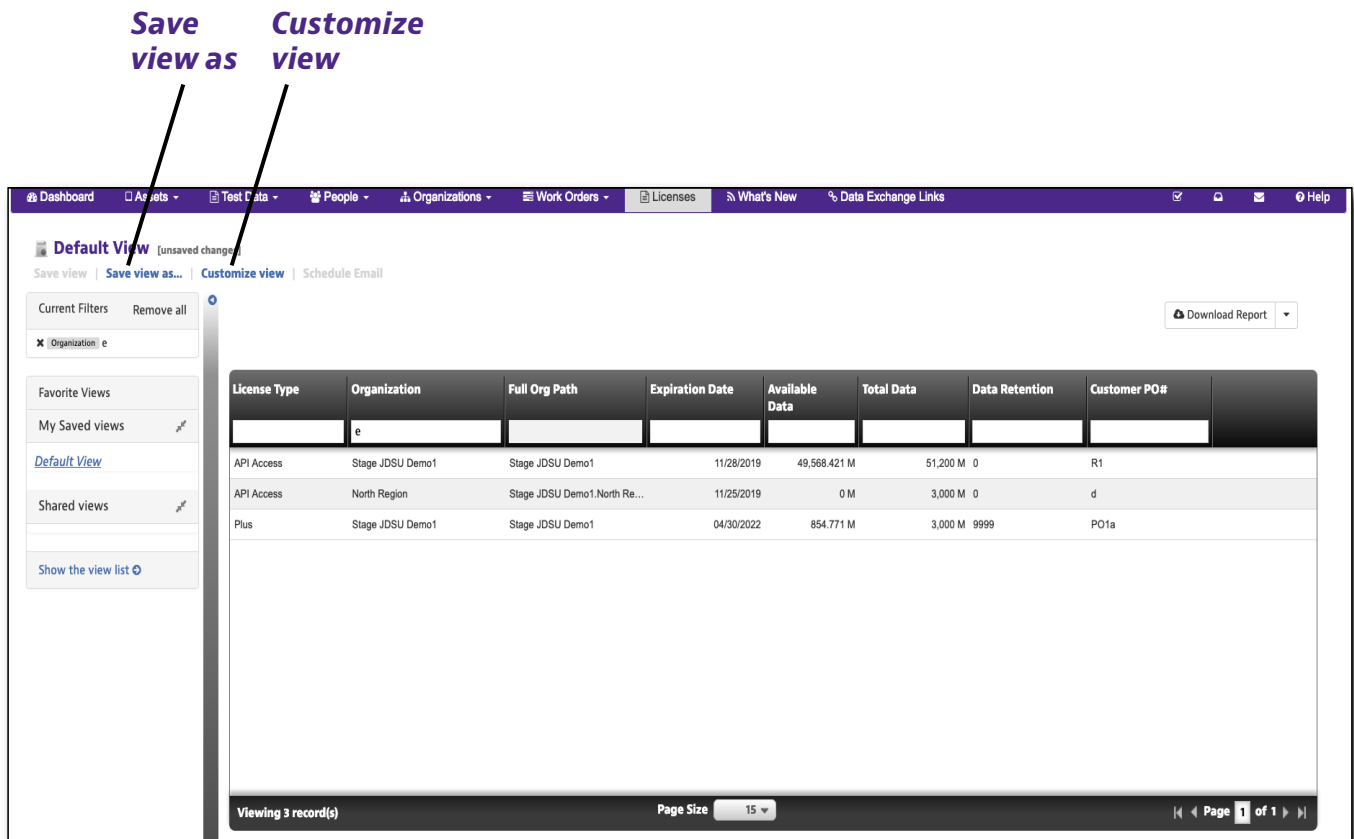
If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

# Views

## Customizing views

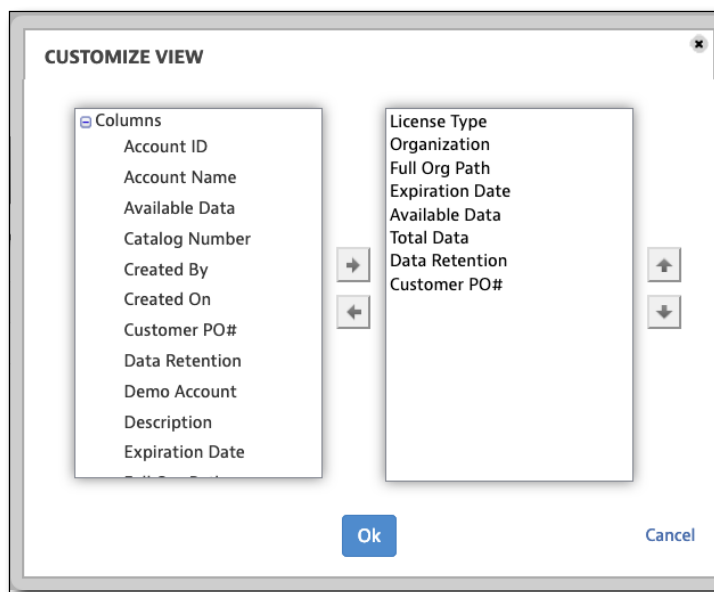
StrataSync gives you the ability to customize your list views.

1. Select the **Licenses** tab. The Licenses List appears.
2. Select **Customize view** at the upper left of the screen.



Licenses Default View

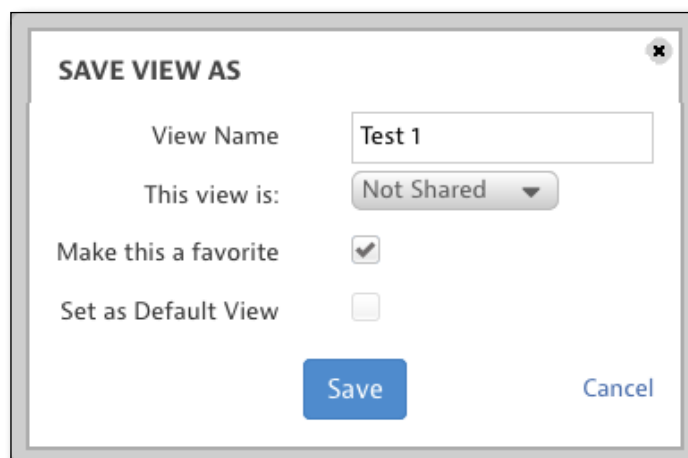
1. The Customize View screens appears.
2. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
3. Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
4. When done, click **OK**.



## Saving views

1. From the Licenses List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
2. Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
3. When done, click **Save**.

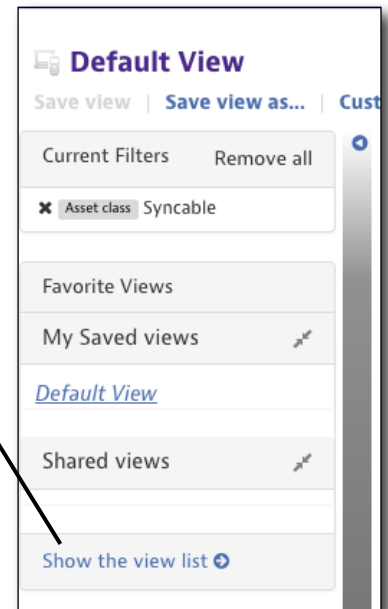
The new view is listed under the Favorite Views section on the left.



## Sharing and editing views

1. From the Licenses List, select **Show the view list** on the left side of the screen. The Saved and Shared Views screens appears.

*Show the view list*



2. Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
3. When finished, click **Done**.

SAVED AND SHARED VIEWS						
View Name	Created By	Last Modified	Shared	Favorite	Default	Actions
All columns	JDSU Demo1	10/07/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
B Test 1	Barry Howell	01/21/2019	Not Shared	<input type="checkbox"/>	<input type="radio"/>	<a href="#">Rename</a> <a href="#">Delete</a>
Brian's Cal View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's Org View	JDSU Demo1	10/21/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
Brian's View	JDSU Demo1	10/23/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
CellAdvisor Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	
DSAM with 0 sn	JDSU Demo1	05/01/2014	Shared	<input type="checkbox"/>	<input type="radio"/>	
HST-3000 Only	JDSU Demo1	10/18/2013	Shared	<input type="checkbox"/>	<input type="radio"/>	

[Done](#)

**Note:** Once a shared view is created, it cannot be edited. You need to create a new one and delete the old one.



## License List

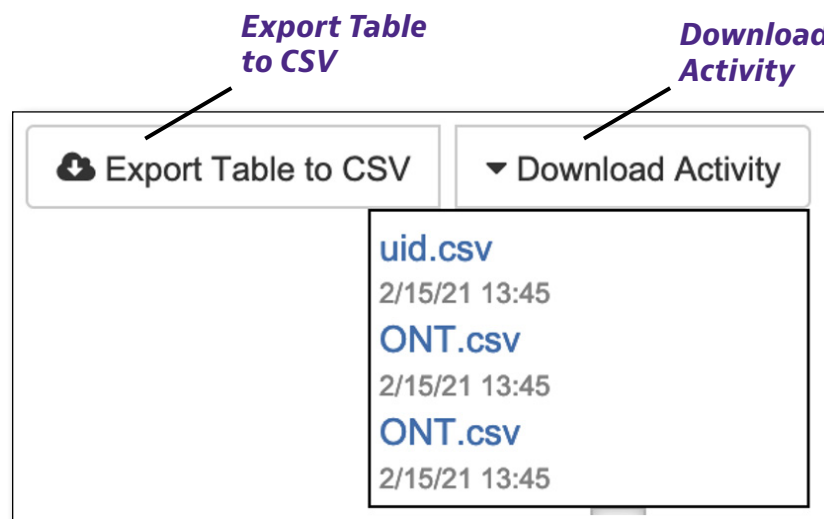
### Exporting lists to CSV

On all list pages (Assets, Test Data, People, Organizations, Work Orders and Licenses), you can download your current list view using the **Export Table to CSV** button.

Use the **Download Activity** dropdown to see the list of files downloaded from the browser over the last 7 days as a result of clicking the **Export Table to CSV** button, or from the Test Data list view downloaded from the **Actions** button dropdown.

When ready, a popup will ask where you want to save the file.

Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.



*Exporting data to CSV*

## Software option licensing

Much of the licensing for software options are tied to individual assets, so these features are covered previously in the Assets chapter, including reporting, assigning options to assets, and reallocating licenses to other organizations, etc.

See *"Assets"* on page 63.



# Configuration



This chapter covers how to configure the StrataSync system, including the following::

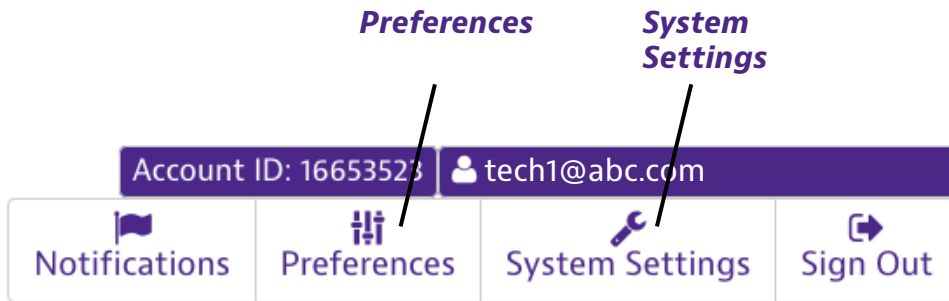
- "Configuration" on page 228
- "Preferences" on page 228
- "System Settings" on page 232

# Configuration

The **Preferences** feature allows you to configure your user preferences, including general appearance, language, security, notifications, measurement units, and dashboard settings.

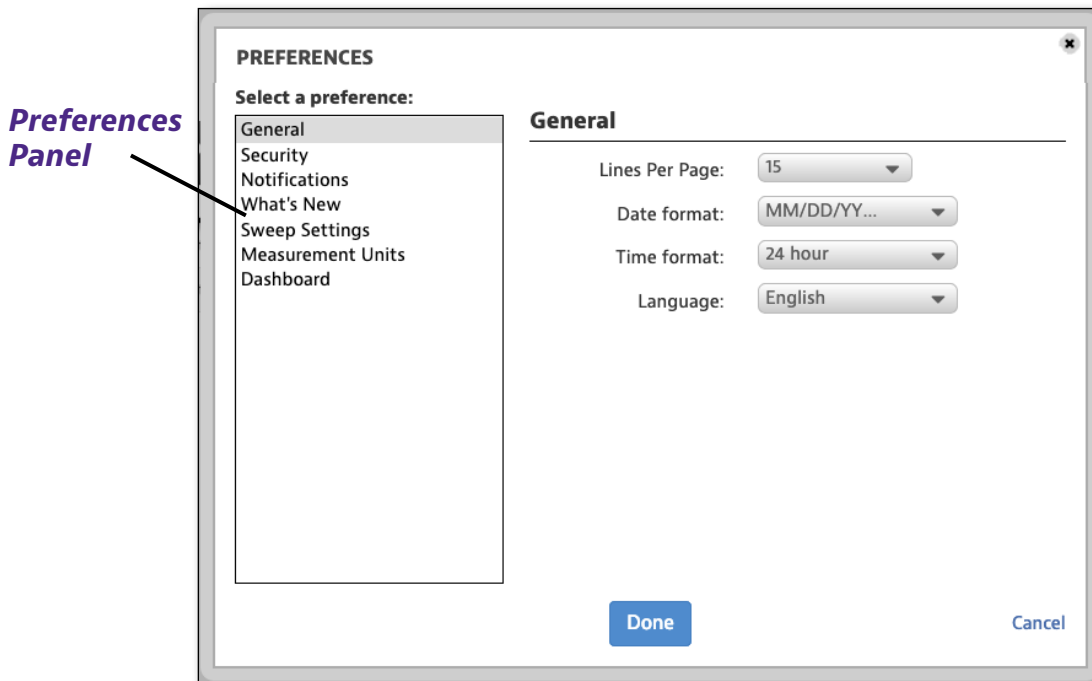
The **System Settings** feature allows StrataSync administrators to configure the overall system, including security, asset management, organization, firmware management, and configuration template settings.

On the top right side of the screen, select **Preferences**  or **System Settings**  from the Main toolbar, as shown below. The corresponding menu is displayed.



## Preferences

On the left side of the screen is the **Preferences Panel**, with several categories of user preferences. Select one to show the options on the right.



User Preferences, with General selected

## General

Select **General** to bring up the General section.

This feature allows you to set up lines per page, date and time formats, and language for the site.

When finished, click **Done**.

The screenshot shows the 'General' configuration panel with the following settings:

- Lines Per Page: 15
- Date format: MM/DD/YY...
- Time format: 24 hour
- Language: English

## Security

Select **Security** to bring up the Security section.

This feature allows you to set up and change your password.

When finished, click **Done**.

The screenshot shows the 'Security' configuration panel with the following fields and a button:

- Instruction: Passwords must be at least 6 characters in length
- Current Password: [Text Input]
- New Password: [Text Input]
- Confirm password: [Text Input]
- Set Password [Button]

## Notifications

Select **Notifications** to bring up the Notifications section.

This feature allows you choose what system event notifications you are subscribed to.

When finished, click **Done**.

The screenshot shows the 'Notifications' configuration panel with the following options:

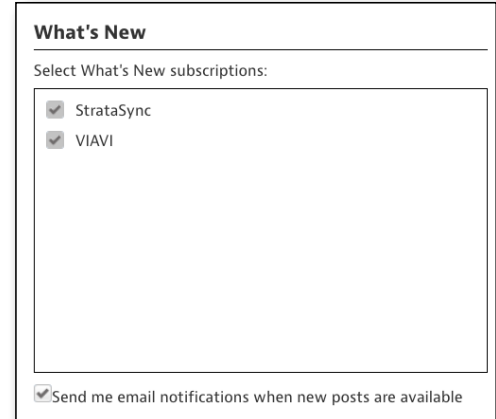
- Select notification subscriptions:
- Asset Events
- Configuration Events
- Notable Dates
- Organization Events
- System Events
- Template Events
- User Created
- User Events

## What's new

Select **What's New** to bring up the What's New section.

This feature allows you choose what application events and announcements you are subscribed to. You can also subscribe for email notifications for new posts.

When finished, click **Done**.



## Sweep settings

Select **Sweep Settings** to bring up the Sweep Settings section.

This feature allows you configure how applicable instrument Sweep and Reverse Alignment measurement files are shown in StrataSync.

While viewing file details, you can save and apply custom-named sweep settings for all files of this type.

If this is not set, the setting will match the original measurement settings.

When finished, click **Done**.



## Measurement units

Select **Measurement Units** to bring up the Measurement Units section.

This feature allows you to choose how instrument measurement files and configuration editors are shown in StrataSync. This overrides the overall System Settings set by your StrataSync administrator.

When finished, click **Done**.

The screenshot shows a window titled "Measurement Units" with a subtitle "Configure measurement units:". It contains four rows of configuration options, each with a label and a dropdown menu:

- Signal Level Units: dBmV
- Signal Quality Units: MER
- Hum Units: %
- Distance Units: Feet

## Dashboard

Select **Dashboard** to bring up the Dashboard section.

This feature allows you to choose what summary panels appear on the Main Dashboard. Use the dropdowns to choose from among 13 available panels.

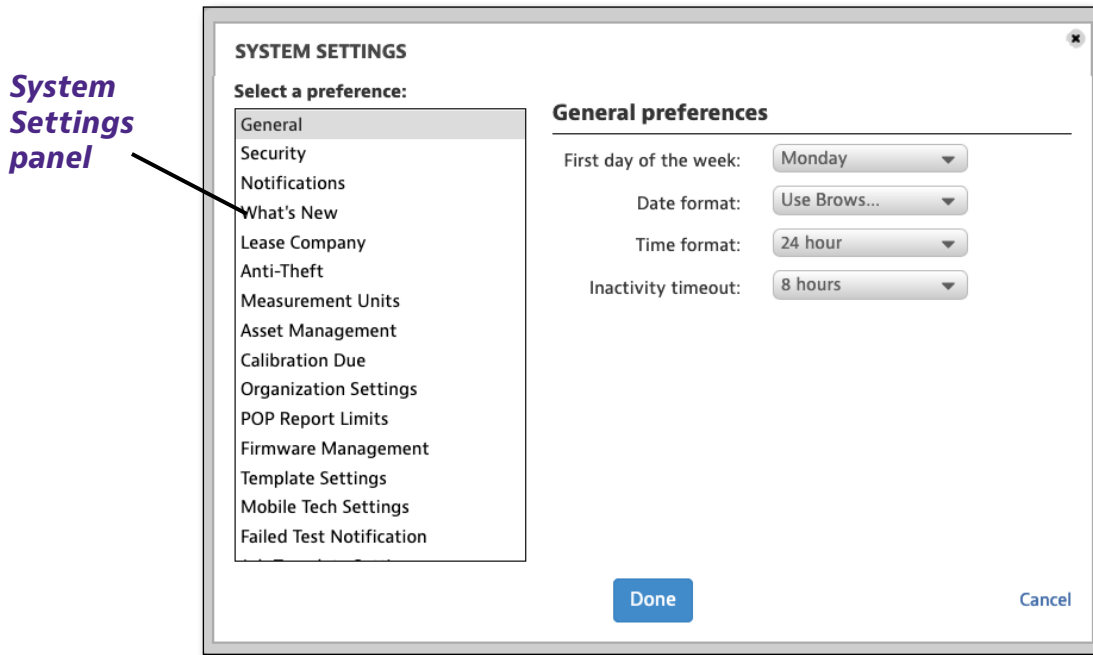
When finished, click **Done**.

The screenshot shows a window titled "Dashboard" with a subtitle "Customize summary panels on Dashboard:". It contains six rows of configuration options, each with a label and a dropdown menu:

- Summary Panel 1: Assets Class
- Summary Panel 2: Test Data U...
- Summary Panel 3: People Role
- Summary Panel 4: Sync Status
- Summary Panel 5: Test Data T...
- Summary Panel 6: Organizati...

## System Settings

On the left side of the screen is the **System Settings panel**, with several categories of system-wide settings. Select one to show the options on the right.



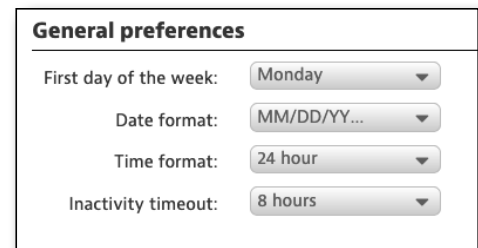
System Settings, with General selected

### General

Select **General** to bring up the General section.

This feature allows you to set the first day of the week, date and time formats, and inactivity timeout when user's need to log back in.

When finished, click **Done**.



#### NOTE:



**Only StrataSync administrators or users with permission can make changes to System Settings, as they are site wide.**



## Security

Select **Security** to bring up the Security section.

This feature allows you to set up password strength requirements.

When finished, click **Done**.

### Security Preferences

- Minimum password length (6 - 10)
- Require both upper and lower case
- Require at least one number
- Require at least one special character !#\$%&\_+=+<>

#### Recommended best practice:

A minimum password length of at least 8 characters, enabling 'Require both upper and lower case', and enabling 'Require at least one number' are recommended.

## Notifications

Select **Notifications** to bring up the Notifications section.

This feature allows you choose what system-wide event notifications are available and for how long.

When finished, click **Done**.

### Notifications

Notification Life:  days

Select events to make available:

- Asset Events
- Configuration Events
- Notable Dates
- Organization Events
- System Events
- Template Events
- User Created
- User Events

## What's new

Select **What's New** to bring up the What's New section.

This feature allows you choose what system-wide application events and announcements are available.

When finished, click **Done**.

### What's New

Select What's New subscriptions:

- Capacity Advisor
- CellAdvisor BSA
- CellAdvisor CAA
- CellAdvisor RFA
- CellAdvisor SA
- DSAM
- FiberChek
- HST-3000
- OneExpert CATV

## Lease company

Select **Lease Company** to bring up the Lease Company section.

This feature allows you manage lease company information for associated assets.

To add a lease company, click **Add lease company** in the upper right.

Enter the lease company information, then click **Save**. The company will be added to the list.

To edit or delete a company, select **Edit** or **Delete**.

When finished, click **Done**.

Lease Company		
Name	Leases	Actions
Enterprise Le...	1	<a href="#">Edit</a>   <a href="#">Delete</a>
JDSU	10	<a href="#">Edit</a>   <a href="#">Delete</a>

**LEASE COMPANY - Create**

\* Business Name:

Contact:

Telephone:

email:

**Save** **Cancel**

## Anti-Theft

Select **Anti-Theft** to bring up the Anti-Theft section.

This feature allows you to manage anti-theft measures for your instruments and whether they can sync data to StrataSync.

When finished, click **Done**.

**Note:** This feature is dependent on the instrument and may not be available for all products.

Anti-Theft			
Apply Anti-Theft settings to the following instrument types			
Asset Type	Enable Anti-Theft	Days	Power Cycles
CellAdvisor 5G	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CellAdvisor BSA	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="2"/>
CellAdvisor CAA	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="2"/>
CellAdvisor RFA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CellAdvisor SA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
DSAM	<input type="checkbox"/>	<input type="text" value="7"/>	<input type="text" value="3"/>

## Measurement units

Select **Measurement Units** to bring up the Measurement Units section.

This feature allows you to choose how instrument measurement files and configuration editors are shown in StrataSync system wide.

When finished, click **Done**.

## Asset management

Select **Asset Management** to bring up the Asset Management section.

This feature allows a new asset to bypass the holding bin and move directly to the inventory, assigned to a specified Tech ID.

**Note:** You will need to create the Tech ID if it doesn't already exist in StrataSync.

Without this option, the asset will be placed in the holding bin and manual management is required to move it to the inventory.

Choose one of these options:

- **Enable auto-assign of assets without a Tech ID** – Assets that have not been assigned a Tech ID are automatically assigned to the specified Tech ID
- **Enable auto-assign of assets with unidentified Tech ID** – Assets with unidentified Tech IDs get auto assigned to the specified Tech ID

When finished, click **Done**.

For more details, see ["Unidentified Tech ID role" on page 164](#).

## Calibration due

Select **Calibration Due** to bring up the Calibration Due section.

This feature allows you to set calibration intervals for assets system wide.

When finished, click **Done**.

**Calibration Due**

Configure Calibration Due times:

AssetType	Calibration Due (months)	
124	12	Default
135	12	Default
AVX-10K	12	Default
BERT 40G/100G TM6	12	Default
BERT CSAM1	12	Default
BERT MSAM1	12	Default

## Organization settings

Select **Organization Settings** to bring up the Organization Settings section.

This feature allows suborg owners to set some of the system settings for their own organizations.

Select the **Enable organization settings override system settings** checkbox.

When finished, click **Done**.

**Organization Settings**

Enable organization settings override system settings

## POP report limits

Select **POP Report Limits** to bring up the POP Report Limits section.

This feature allows you to configure POP report limits for applicable instruments.

When finished, click **Done**.

**POP Report Limits**

Configure POP Report Limits: Restore To Default

24 Hour Deviation(dB):	+8.0
Maximum Adjacent Channel(dB):	+3.0
Maximum Analog Delta Video(dB):	+10.0
Analog Delta Video Offset(dB):	+1.0
Maximum Digital Delta Video(dB):	+10.0
Digital Delta Video Offset(dB):	+1.0
Minimum Video Level(dBmV):	+3.0

## Firmware management

Select **Firmware Management** to bring up the Firmware Management section.

This feature allows you to manage firmware versions for your assets, including options to only show approved firmware and to auto deploy the firmware.

**Firmware Management**

Show only approved firmware versions in Upgrade Firmware functionality

Manage Firmware Versions

Enable Firmware Auto Deploy

To enable firmware management, select the **Show only approved firmware versions in Upgrade Firmware functionality** checkbox. This will enable the **Manage Firmware Versions** button below, as well as the corresponding button on the Main Dashboard.

Select **Enable Firmware Auto Deploy**, if necessary.

Select **Manage Firmware Versions** and choose an asset to see available firmware. For details, see ["Managing firmware versions" on page 40](#).

When finished, click **Done**.

Manage Firmware Versions

Asset Type: OneExpert CATV

Approval Status	Actions	Package Name	Version	Release Date	Status
APPROVED	[Icons]	4.0.11	4.0.11	2020/04/21	Beta
In Test	[Icons]	3.21.448	3.21.448	2020/04/23	Beta
To Be Tested	[Icons]	4.0.13	4.0.13	2020/05/12	Beta
To Be Tested	[Icons]	4.0.15	4.0.15	2020/05/19	Beta
APPROVED	[Icons]	4.0.18	4.0.18	2020/06/22	Beta
To Be Tested	[Icons]	3.21.521	3.21.521	2020/06/22	Beta
To Be Tested	[Icons]	4.0.21	4.0.21	2020/07/27	Beta
To Be Tested	[Icons]	4.1.10	4.1.10	2020/07/31	Beta

## Template settings

Select **Template Settings** to bring up the Template Settings section.

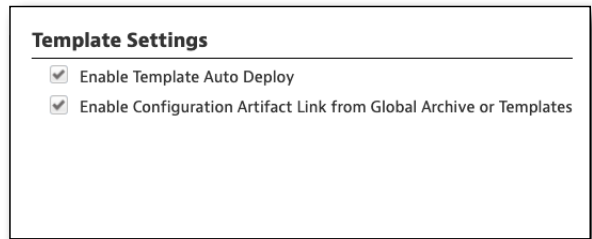
This feature allows you to enable configuration template auto deployment and if configuration artifacts link from the Global Archive or templates.

Choose from these options:

- **Enable Template Auto Deploy** – Auto deploy templates to assets in an organization and its suborgs you have set up for specific asset types
- **Enable Configuration Artifact Link from Global Archive or Templates** – Allow parent and child artifact links to be synchronized when changes are made

When finished, click **Done**.

For more detailed information on auto template deployment and artifact linking, see *"Automatic template deployment and artifact linking" on page 208* or contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com).



## Mobile Tech settings

Select **Mobile Tech Settings** to bring up the Mobile Tech Settings section.

This feature allows you to consistently configure the VIAVI Mobile Tech app across a large fleet of technicians for accounts configured for this capability. The settings are applicable for all Mobile Tech users associated with the StrataSync account.

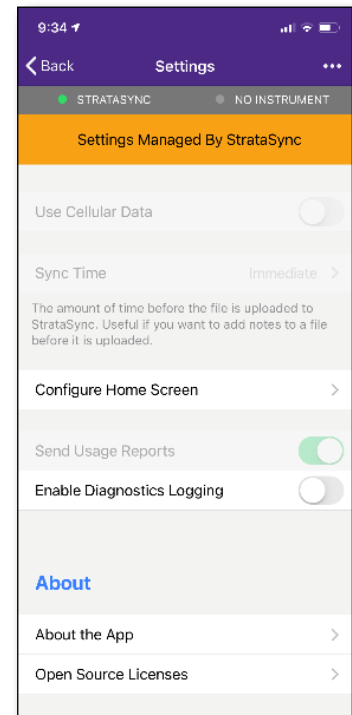
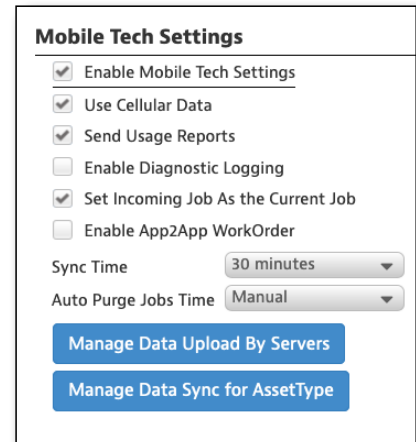
Choose from these options:

- **Enable Mobile Tech Settings** – Allow the Mobile Tech app settings to be managed by StrataSync  
When enabled, any user logging into the Mobile Tech app will see the common settings grayed-out and a yellow banner stating “Settings Managed By StrataSync”.
- **Use Cellular Data** – Allow Mobile Tech to use cellular data as well as WiFi
- **Send Usage Reports** – Send reports to StrataSync
- **Enable Diagnostic Logging** – Allow diagnostic logging for advanced troubleshooting
- **Set Incoming Job as the Current Job** – Set the incoming job as the default current job
- **Enable App2App Workorder** – Allows a work order push from a customer mobile app to Mobile Tech
- **Sync Time** – Sets the interval Mobile Tech syncs to StrataSync
- **Auto Purge Jobs Time** – Sets the frequency jobs are purged from the system
- **Manage Data Upload by Servers** – Allows Mobile Tech to share test data directly to a customer server via API
- **Manage Data Sync for AssetType** – Allows Mobile Tech to share test data directly to a customer mobile app and server via API

When finished, click **Done**.

For more details, see the [Mobile Tech Generic App to App Integration Developer Guide](#) and the [Generic Direct Test Results Server Upload Integration Developer Guide](#).

Contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com).



## Failed test notification

Select **Failed Test Notification** to bring up the Failed Test Notification section.

This feature allows you to enable email notifications for failed test results uploaded to StrataSync accounts configured for this capability.

We'll cover the main aspects of this feature in the next few pages.

When finished, click **Done**.

Please note that due to the nature of this functionality and applicability to potentially all technicians within a given StrataSync account, and the fact that multiple supervisor/admin users may be monitoring the same technician, it is imperative that correct email addresses be provisioned for the supervisor/admin users who select one or more technicians to monitor for failed tests. Any customer account which generates a significant % of bounced bad email address messages may be temporarily have this feature deactivated.

This feature allows technician supervisors, or any StrataSync user with the 'Edit Users' permission and associated with the same organization as the technician (or a parent organization), to monitor one or more technicians for failed tests of configured test types.

To view the actual failed test results file, the supervisor would additionally need the 'View Test Data File' permission. If multiple failed test results files are uploaded by the technician in a single sync session to the StrataSync server, then these failed files are typically consolidated into a single email notification. There are three main areas of configuration:

- Configuring the overall system settings for failed test email notifications
- Configuring the test types to trigger email notifications
- Configuring the technicians to monitor



## Configuring the overall system settings for failed test email notifications

The 'Enable Failed Test Notification' control enables or disables this functionality for the whole StrataSync account. When enabled, failed tests matching the configured test types for monitored technicians uploaded afterwards will generate email notifications. When disabled, all email notification for failed tests is prevented. Please note, while the functionality is disabled, StrataSync will not buffer/store failed test email notifications, so any failed tests uploaded during the disabled time period will not generate email notifications, even after the functionality is enabled.

**Failed Test Notification**

- Enable Failed Test Notification
- Include link to failed test record(s)
- Attach failed test record(s)

Email "Subject" field:

Apply failed test notifications to the following test types:

- JSON REPORT
- JSON REPORT.Continuity
- JSON REPORT.FCOMP
- JSON REPORT.OTDR
- Kabeldiagnose Test
- L1 Optics Test
- Leakage ScreenShot
- Level

Optionally, a link to the failed test results files on the StrataSync account and/or attaching the results files to the email notification can be configured. VIAVI recommends that including a link ensures rapid email notification without exceeding your email size limitations and clogging up your inbox with large emails. Note however, due to the nature of many commercial email systems, it may take several minutes for the email to appear in your inbox after the failed test (or tests) was/were uploaded to StrataSync. Email attachments are useful however for users of mobile devices in the field who need a rapid assessment of the condition.

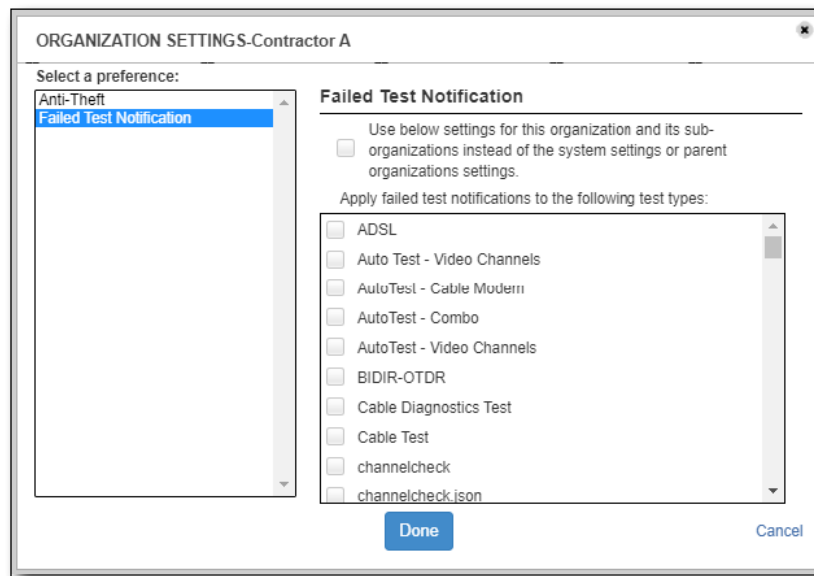
In addition, the email subject field can be configured from the default "Failed result uploaded".

## Configuring the test types to trigger email notifications

In the previous screenshot, the final control in the System Settings for Failed Test Notification is to configure which test types will trigger email notifications. Depending on the VIAVI test instruments in use within your StrataSync account, there may be hundreds of test type options. Remember that for some test types, such as fiber inspection, it may be quite common to experience failed tests, so careful selection of the test type to match your business requirements is essential to prevent excessive email notifications being sent. VIAVI recommends that customers configure only principle test types (i.e. those that drive your compliance metrics) such as 'JSON REPORT.OTDR' (but not associated fiber inspection), 'TrueSAM' and 'onechecksessionexpert.json' test types are configured for failed test email notifications.

As some customers represent large organizations which manage multiple sub-organizations managing different technician workgroups with different responsibilities and testing different technologies, the test types which trigger email notifications can be additionally configured at the organization level (see screenshot below).

In the Organizations tabs, when selecting the organization of interest, and clicking the gear/cog settings icon, there is a new 'Failed Test Notification' section which allows you to override the system settings for test types, and instead choose different test types. So, for example, one organization responsible for CATV service activation may configure 'onechecksessionexpert.json', and another organization handling fiber construction in the outside plant may configure 'JSON REPORT.OTDR'.



## Configuring the technicians to monitor

Each user who wishes to monitor one or more technicians, must log into their company's StrataSync account and have an associated user profile which includes the 'Edit Users' permission. To check this, you can click your username icon in the top-right of the StrataSync web browser window/tab and review your user role and permissions. To monitor one or more technicians for failed tests, select their associated checkbox in the People tab 'People list' and select 'Turn ON failed test notifications' from the 'Actions' button (or right-click on one of the selected user rows). Monitored users have a "Yes" in the 'Receive Failed Test Notifications?' column, so you can quickly filter on which technicians you're currently monitoring.

The screenshot displays the StrataSync 'People' tab interface. A table lists users with columns for Login Name, First Name, Last Name, Tech ID, Role, Organization, Full Org Path, Manager Login Name, Manager First Name, Manager Last Name, Receive Failed Test Notifications?, Number of assets, and Last Login Date. The 'tech4' user is highlighted, and the 'Actions' menu is open over their row, showing options like 'Check All on this Page', 'Uncheck All on this Page', 'View Edit User Details', and 'Turn ON failed test notifications'.

Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name	Receive Failed Test Notifications?	Number of assets	Last Login Date
jdsu.demo1@jdsu.com	JDSU	Demo1	demo1	Administrator	JDSU Demo 1	JDSU Demo 1				No	216	1/11/21
eastmgr.demo1@jdsu.com	East	Manager	eastmanagerdemo1	Administrator	East Region	JDSU Demo 1 Legacy E...	EastMgr.demo1@jdsu.com	East	Manager	No	2	
southmgr.demo1@jdsu.c...	South	Manager	southmanagerdemo1	Manager	JDSU Demo 1	JDSU Demo 1				No	0	2/27/15
westmgr.demo1@jdsu.com	West	Manager	westmanagerdemo1	Manager	West Region	JDSU Demo 1 Legacy W...	WestMgr.demo1@jdsu.c...	West	Manager	No	0	
northmgr.demo1@jdsu.c...	North	Manager	northmanagerdemo1	Manager	North Region	JDSU Demo 1 Legacy N...	jdsu.demo1@jdsu.com	JDSU	Demo1	No	0	
tech1.demo1@jdsu.com	tech1ss	demo1	t1d1	View-Only	Canada	JDSU Demo 1 Canada	patrick.noel@viasolutio...	Patrick	Noel	No	0	10/24/14
tech2.demo1@jdsu.com	tech2	demo1	t2d1	Technician	BHN Indianapolis	JDSU Demo 1 Legacy B...	mark.ortel@demo.jdsu.c...	Mark	Ortel	No	0	
tech3.demo1@jdsu.com	tech3	demo1	t3d1	Technician	Boondock Telephone Co...	JDSU Demo 1 Legacy B...	philip.kazakov@jdsu.com	Phillip	Kazakov	No	0	
tech4.demo1@jdsu.com	tech4	demo1	t4d1	Technician	West Region	JDSU Demo 1 Legacy W...	WestMgr.demo1@jdsu.c...	West	Manager	Yes	3	
tech5.demo1@jdsu.com	tech5	demo1	t5d1	Technician	North Region	JDSU Demo 1 Legacy N...	demo1@jdsu.com	JDSU	Demo1	No	2	5/27/14
tech6.demo1@jdsu.com	tech6	demo1	t6d1	Technician	East Region	JDSU Demo 1 Legacy E...	demo1@jdsu.com	East	Manager	No	1	
tech7.demo1@jdsu.com	tech7	demo1	t7d1	Technician	JDSU Demo 1	JDSU Demo 1				No	1	
tech8.demo1@jdsu.com	tech8	demo1	t8d1	Technician	West Region	JDSU Demo 1 Legacy W...	demo1@jdsu.c...	West	Manager	No	1	
tech9.demo1@jdsu.com	tech9	demo1	t9d1	Technician	North Region	JDSU Demo 1 Legacy N...	demo1@jdsu.com	JDSU	Demo1	No	1	
tech10.demo1@jdsu.com	tech10	demo1	t10d1	Manager	East Region	JDSU Demo 1 Legacy E...	demo1@jdsu.com	East	Manager	No	1	

### People tab – Monitoring technicians failed tests

#### Please note:

- If you are a manager/supervisor user, and you are monitoring one or more technicians in your organization or sub-orgs, and your own user profile is being moved to another organization in the StrataSync account, you may be unsubscribed from some or all email notifications if your new organization is part of a different org hierarchy and you are not given visibility back to the orgs where the monitored technicians reside – in this case any admin user moving your user profile will be provided the appropriate warning message.
- Similarly, if an admin user moves a technician user monitored by one or more supervisors/managers to a different organization, StrataSync will review the supervisor/manager visibility to the new organization and display a warning message "Moving this user may turn off emailed notifications for subscribed users" as necessary.

As an administrator user, for any given technician user (e.g. Tech ID 't4d1' in the screenshot below), you can view which supervisor/manager users are currently subscribed to monitor that technician (i.e. they have selected to receive failed test email notifications for that technician).

In the example below, while the admin user 'jdsu.demo1@jdsu.com' is not monitoring technician 't4d1', as the 'Fail test notification configured' value is "No" under 'Access and Visibility', the admin user can see that the manager 'michaelproctor@mac.com' has subscribed to monitor this technician (under the 'Subscribed Failed Test Notification Users' value).

The screenshot displays the user profile for 'tech4 demo1' in the StrataSync system. The profile is divided into three main sections:

- User Information:** Includes fields for Username (tech4.demo1@jdsu.com), Email (tech4.demo1@jdsu.com), First Name (tech4), Last Name (demo1), Unique ID (1255), and Employee/Tech ID (t4d1).
- Contact Information:** Includes fields for Mobile Phone, Office Phone, Street Address, City (Indianapolis), State (IN), Postal Code (46203), and Country (USA).
- Access and Visibility:** Includes a checked 'Login Enabled' checkbox, 'Visibility Organization' (West Region), 'Organization' (West Region), 'Manager' (West Manager), 'Fail test notification configured' (No), and 'Subscribed Failed Test Notification Users' (michaelproctor@mac.com).

**User profile – Verifying failed tests notifications**

## Failed test email notification example

The following screenshot shows an example email notification for the JSON REPORT. OTDR test type configured in the System Settings, from a monitored technician. It contains the configured email subject "Tech follow-up:failed test uploaded", the test results file is attached and a link is also provided to the test results file on the StrataSync account.

Tech follow-up: failed test uploaded

stratasync-support@viavisolutions.com  
To Michael Proctor

Retention Policy: VIAV Default Retention (1 year) Expires: 2022-01-03  
Sat 2021-01-02 4:18 PM

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

miketest3\_001\_1550\_OE.msor.json  
3 KB

**Tech Info**

**Organization Name:** West Region  
**Full Org Path:** JDSU Demo 1.Legacy.West Region  
**Tech Id:** t4d1  
**First Name:** tech4  
**Last Name:** demo1  
**Email:** [tech4.demo1@jdsu.com](mailto:tech4.demo1@jdsu.com)

**Failed Tests Meta-data**

Work Order Id	testmjp
Filename	miketest3_001_1550_OE.msor.json
Status	Fail
Data Type	JSON REPORT.OTDR
Creation Time	2021-01-02T22:16:50Z
Sync Time	2021-01-02T21:17:50Z
URL	<a href="#">Test Data File</a>
Attachment	Attached

**Email Confidentiality Notice :** The content of this email is confidential and intended for the recipients specified in message only. Do not reply to this message or share any part of this message with any third party.

### Please note that if email attachments are enabled:

- But the user receiving the email notification does not have the 'View Test Data File' permission, there will be no attachments for the email, and additionally the note "Attachments not included because you do not have 'View Test Data File' permission. Please contact your system administrator." will be in the email body.
- But the size of the attachments exceeds 10MB, then only attachments which don't exceed this limit will be attached and subsequent files will not be attached. Instead, links to the missing test results files will be included in the 'URL' section of the Meta-data table even if the 'Include link to failed test record(s)' is not checked in System Settings. Additionally, the note "Total attachments size of 10 MB reached. Please refer to respective meta-data block for missing attachment information." will be in the email body.

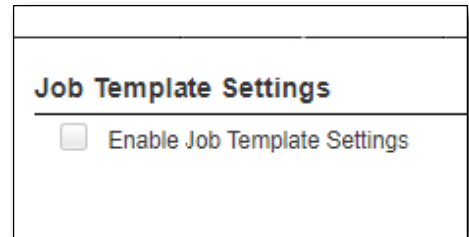
## Job template settings

Select **Job Template Settings** to bring up the Job Template Settings section.

This feature allows you to assign and modify job templates for the the entire account if configured for this capability.

When finished, click **Done**.

**Note:** This feature is dependent on the instrument and may not be available for all products.



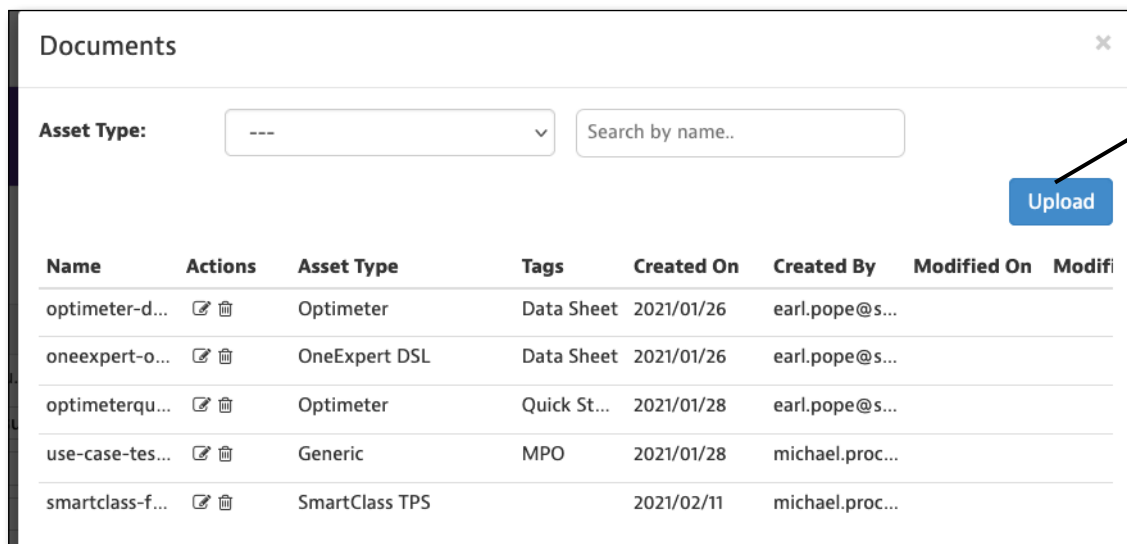
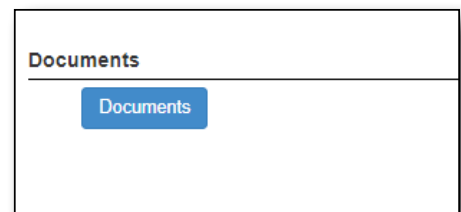
## Documents

Select **Documents** to bring up the Documents section.

StrataSync supports centrally managing documents accessible via the VIAVI Mobile Tech app for accounts configured for this capability.

This is in addition to the VIAVI-provided instrument documentation.

Select **Documents** and a pop-up window shows the current documents uploaded. To upload a new document, select **Upload**.



*Upload*

**Document list in StrataSync**

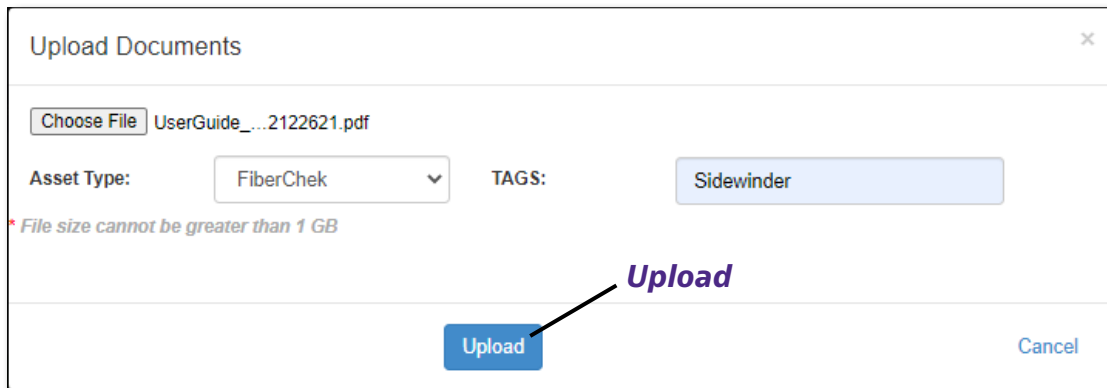
Choose a file to upload, as well as select a specific instrument (asset) type from the dropdown (or select 'Generic'), and also provide tags to further aid document searching. Select **Upload** again to upload your document.

The accepted file types are:

- **Image file types** – jpg, png, gif, bmp, and tif
- **Video file types** – mov, mp4, 3gp, mkv, and m4v
- **Document file types** – html, json, xml, txt, rtf, and pdf

Please note, a maximum number of 1,000 files can be uploaded per-customer account, and the maximum file size per-file is 1 GB.

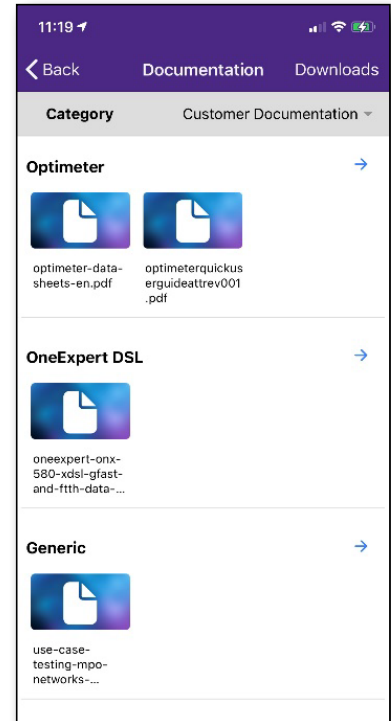
When finished, close the document list and click **Done**.



### *Uploading documents via StrataSync*

Once the document is uploaded, it is viewable along with other uploaded documents. You may edit the associated asset type and tags, but to change the name of the document, you must first delete it from StrataSync and then reupload it with a different name.

For technicians using the Mobile Tech application and logged into the customer account, if they select **Documentation** and then **Customer Documentation** as the category, they will then see documents uploaded to StrataSync organized by the 'Asset Type' selected when uploading to StrataSync.



*Document list in the Mobile Tech app*



## Auto purge work order settings

Select **Auto Purge Work Order Settings** to bring up the Auto-purge section.

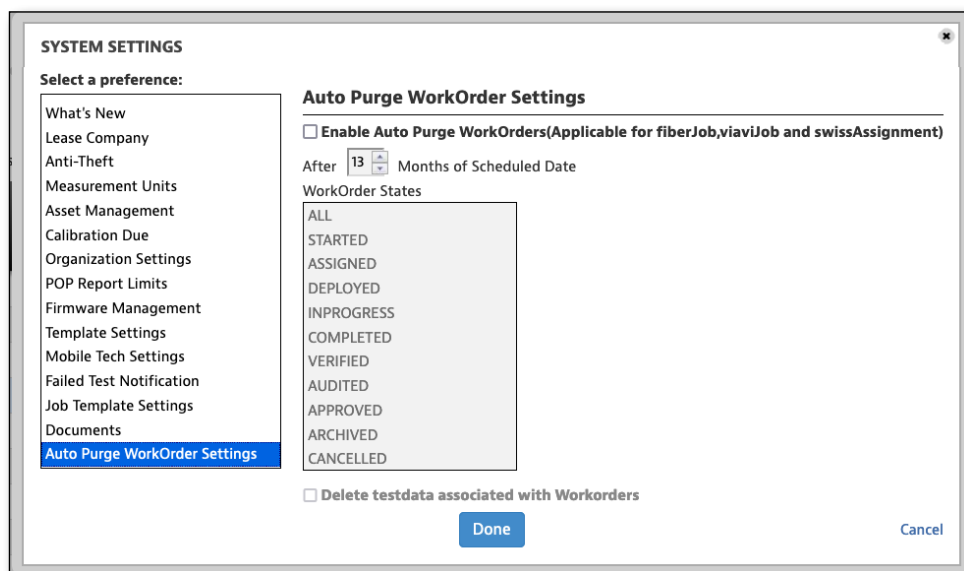
This feature allows support for monthly (runs on the 1st day of every calendar month) automatic purging (deletion) of workorders based on a number of months from each work order's schedule date. This feature applies to CDM 2.1 work orders only.

You can also select to delete only work orders which are in particular states, e.g. you may not want to delete work orders which are still in the "STARTED", "ASSIGNED" or "INPROGRESS" states. Finally you can select whether or not to delete any work order-associated test results in addition to the work order.

This capability only works for the 'viaviJob', 'fiberJob' and 'swissAssignment' job types.

Select **Enable Auto Purge Work Orders** and configure the settings.

When finished, click **Done**.



Customers must be licensed for work order integration to utilize this capability (either the ENTERPRISE WORKFLOW subscription plan or legacy workorder integration licensing).



## Appendix

This appendix includes supplemental information for StrataSync, including the following:

- "Technical assistance" on page 252
- "Additional information" on page 252

## Technical assistance

If you require technical assistance, call 1-844-GO-VIAVI / 1.844.468.4284.

Outside US: +1-855-275-5378

Email: [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com)

For the latest TAC information, visit

<https://support.viavisolutions.com>

<https://www.viavisolutions.com/en/services-and-support/support/technical-assistance>

## Additional information

For more detailed information, contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com) for these additional documents.

**StrataSync Quick Start Guide**

**StrataSync Software Release notes** (including system requirements)





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