



Cloud Services

**StrataSync 17.0, Mobile Tech 5.6,
and Test Process Automation**

User Guide



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: TAC@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 VIAVI Cloud Services and its key features, including the following:

- "About the StrataSync System" on page 16
- "About the VIAVI Mobile Tech app" on page 18
- "About Test Process Automation (TPA)" on page 19

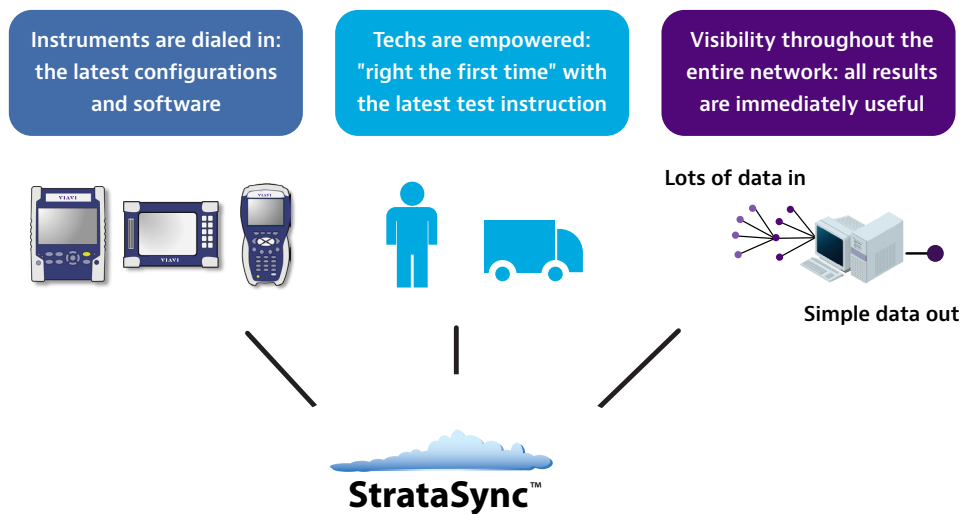
About the StrataSync System

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.

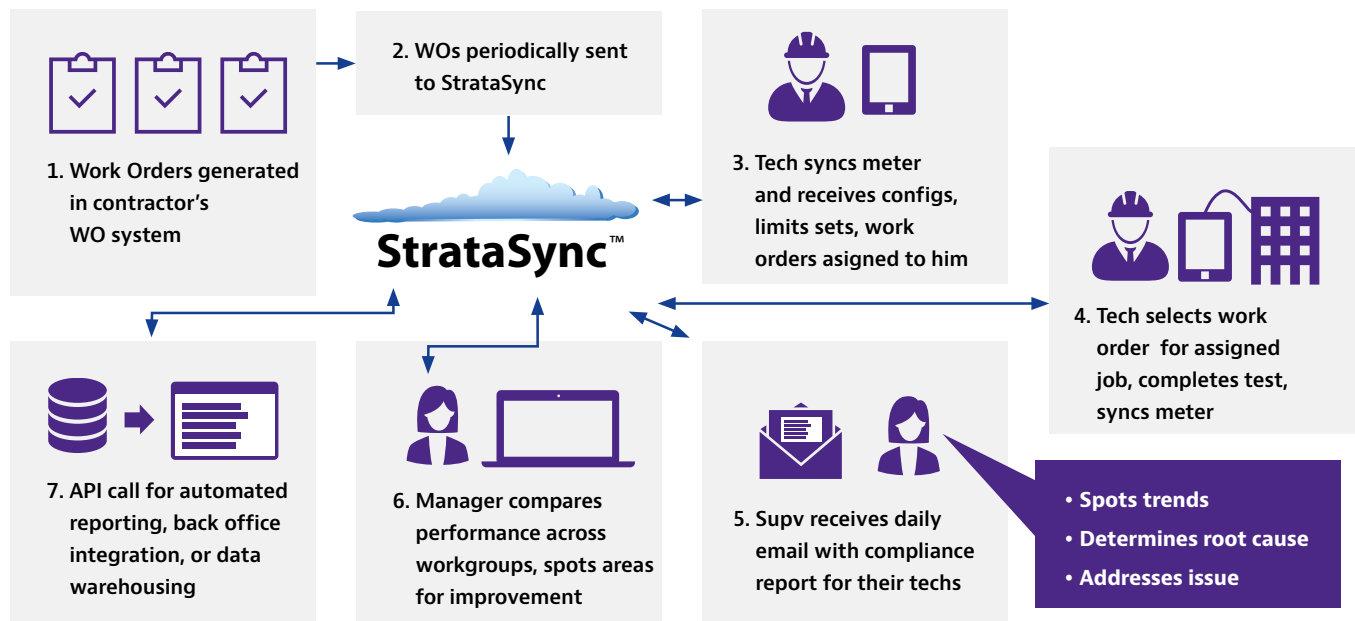
Asset management

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.



About the VIAVI Mobile Tech app

Several VIAVI instruments are designed to be paired with a mobile device or tablet (such as an iPhone, iPad, or similar Android device), and leverage the user interface of those devices along with the **VIAVI Mobile Tech App** to provide a smooth user experience.



Mobile Tech

You can view test results, set up the instrument, sync files, update the meter, and configure test parameters from the app.

To get started, download the VIAVI Mobile Tech app from your App Store.

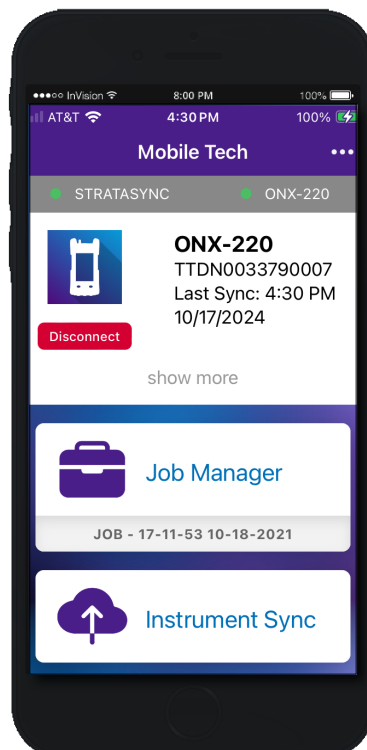
In this guide, we'll use the ONX-220 as the instrument paired to Mobile Tech. For more details, see the [User Guide](#) for your instrument.

Connecting to StrataSync

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

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

See the ["Using the Mobile Tech App" on page 297](#) for more details.



About Test Process Automation (TPA)

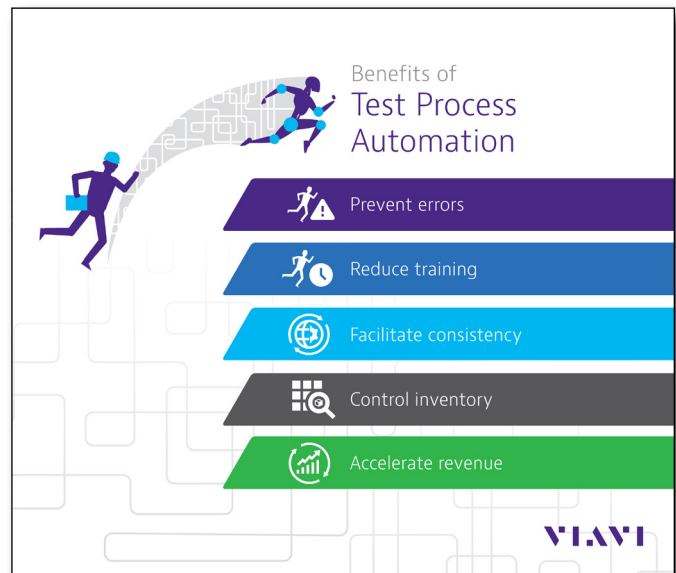
Test Process Automation (TPA) is a cloud-based workflow solution for teams that build, test, and deploy network services.

Powered by StrataSync, TPA connects teams and their test instruments together to ensure alignment, efficiency, and accuracy at every stage of a job.

TPA leverages an ecosystem consisting of 3 parts (StrataSync, VIAVI Mobile Tech, & VIAVI test instruments), each designed to equip team members with the information and resources they need to complete jobs with real-time visibility from start to finish.





TPA features

- **Ensure consistent and efficient operational workflows**
 - Automate flow of information throughout your testing ecosystem
 - Design & assign jobs directly to field technicians
 - Use throughout life cycle: Construction > Service Activation > Maintenance > Upgrade
 - Delivering quality results every time
 - Common data model, creating common rules for how things are done.
 - Speed revenue cycles with real-time results and automatic report generation
 - Efficiently manage inventory and software versions
 - Reduce administrative work
 - Save money by reducing operational costs
 - Automated recording
 - Streamline test results collection to a centralized test data repository



For complete details on TPA, see ["Test Process Automation" on page 65](#).

- **Simplify the field-testing experience for fiber technicians**
 - Reduce manual test processes and data entry - minimizing human error and increasing the scale of network deployment
 - Same user experience across multiple devices.
 - Reduce training needs with guided test processes with the availability of remote expert help
 - Provide objective evidence of proper job completion with a closed-loop test process
 - Collect and present information to allow customers to analyze the job, team, process, project, network, etc.
 - Speed acceptance and get paid faster
- **Reduce administrative work**
 - Save money by reducing operational costs
 - Automated recording
 - Streamline test results collection to a centralized test data repository

 <p>Instrument Check Test</p> <ul style="list-style-type: none">• One-button tests• Sequence of expert measurements / tests encapsulated as a single test operation• Minimizes training and field errors	 <p>Job Manager</p> <ul style="list-style-type: none">• Associates tests to specific workorder• Sequence of individual test tasks grouped together in a single job• Can coordinate tasks and results across instruments• Instrument UI displays step-by-step task instructions, progress and results
 <p>Mobile Tech</p> <ul style="list-style-type: none">• Mobile App- iOS and Android• Auto syncs jobs and results to / from the instrument• App to App sharing• Enriches instrument test results<ul style="list-style-type: none">• Geolocation data• Multimedia attachments (pictures, signature capture)	 <p>StrataSync</p> <ul style="list-style-type: none">• Centralized management<ul style="list-style-type: none">• Organize and push configurations to instrument• Auto collection and organization of test results• KPI dashboards• Analytics• Back office integration of test process / data

Job and Work Order differences

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](#)).

Job is a more general term used to describe one or more tests/tasks performed by one technician, whether for service activation, fiber construction, or some other application. "Job" is used by VIAVI for CDM 2.2. See the TPA API Guides for details ([Test Results](#) and [Jobs](#)).

This document provides an updated VIAVI test process automation (TPA) version which is available starting in StrataSync 15.5 (April 2023) and should be used by new customers requiring test data retrievals or job management via APIs for CDM 2.2.

New features include: updated workflow lifecycle (adding the 'Approved' state), updated job uniqueness (only the workorderId), and updated deployment rules (e.g. a job starts at the scheduled date and ends once 'Approved' or after 13 months).

For Test Process Automation (CDM 2.2), select the **TPA** tab in StrataSync. For Work Orders (CDM 2.1), select the **Work Orders** tab.

For more information, see ["Test Process Automation" on page 66](#), ["Work Orders" on page 235](#), or the corresponding API guides.

Getting Started

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

- "Logging into StrataSync" on page 24
- "Updating your user profile" on page 25
- "Setting up StrataSync" on page 26
- "StrataSync visual overview" on page 27

Logging into StrataSync

Welcome to StrataSync! To bring up the StrataSync login screen from your browser, type the following URL and press return.

US: <https://stratasync.viavisolutions.com>

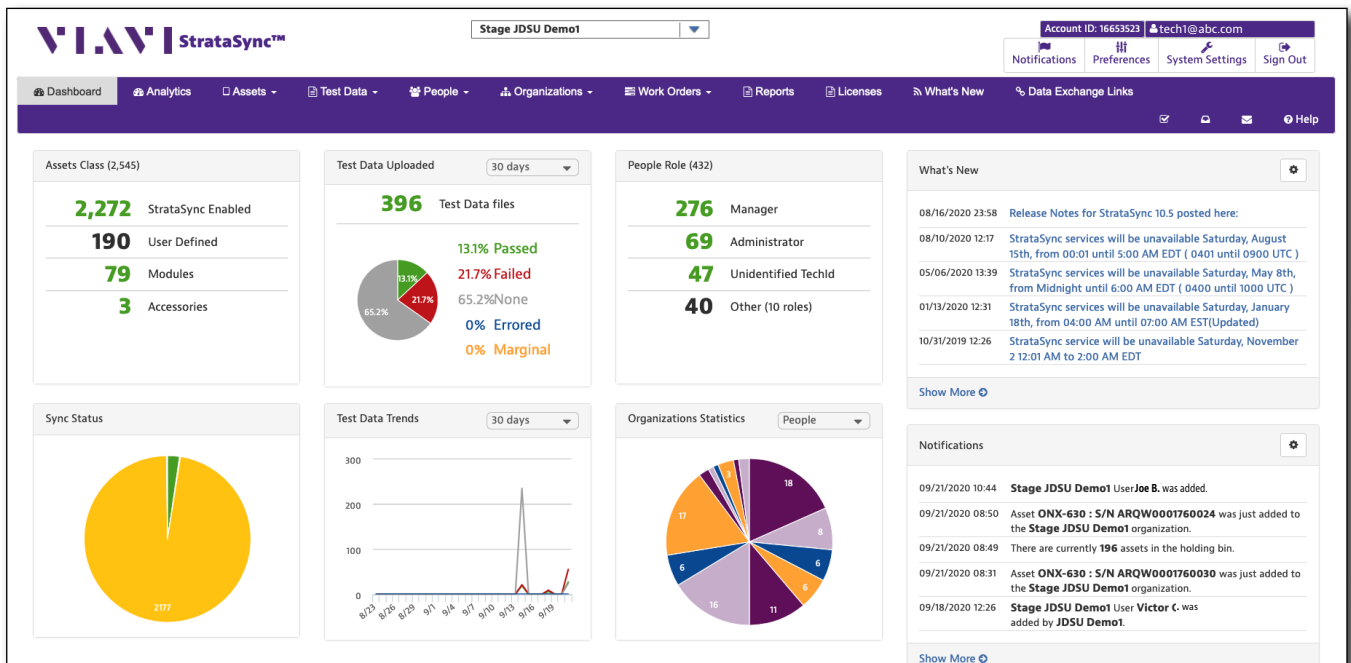
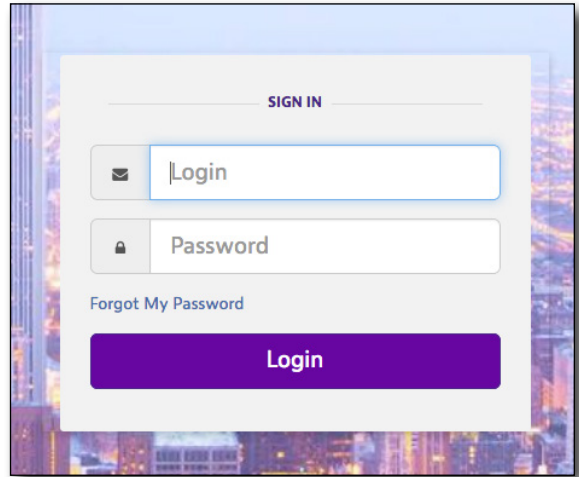
EU: <https://eu.stratasync.viavisolutions.com>

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 **Login** button. The StrataSync **Main Dashboard** will be displayed.

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

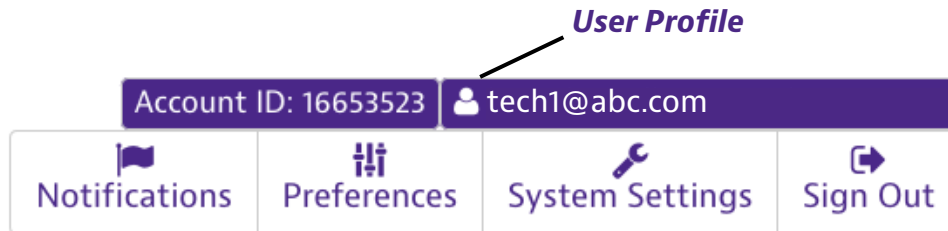


StrataSync Main Dashboard

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.



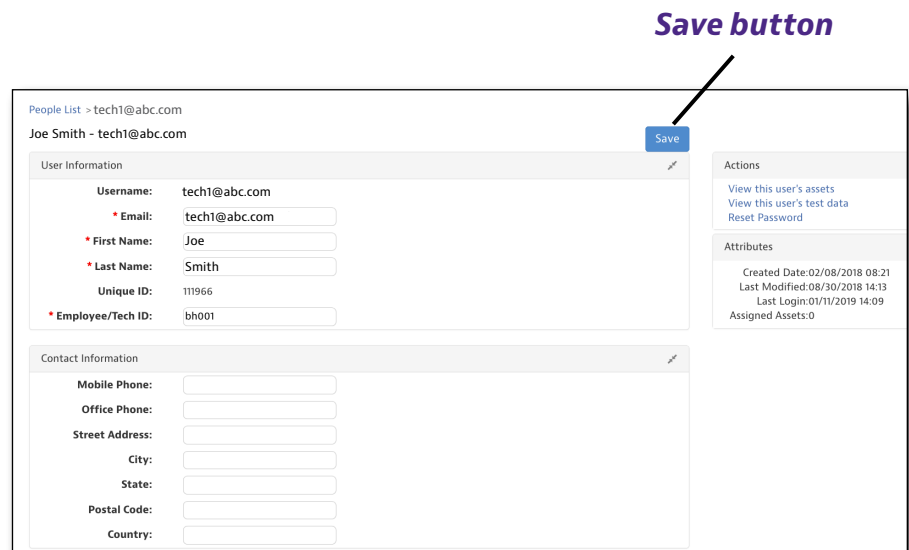
User Profile in the Main toolbar

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 two panels: "Actions" and "Attributes".

Actions:

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

Attributes:

- Created Date: 02/08/2018 08:21
- Last Modified: 08/30/2018 14:13
- Last Login: 01/11/2019 14:09
- Assigned Assets: 0

A blue "Save" button is located at the top right of the form, with a label "Save button" and an arrow 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' with the email 'tech1@abc.com'. The profile is divided into 'User Information' and 'Contact Information' sections. On the right, an 'Actions' panel is visible, containing a 'Reset Password' button. A red arrow points to this button.

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 271](#)

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

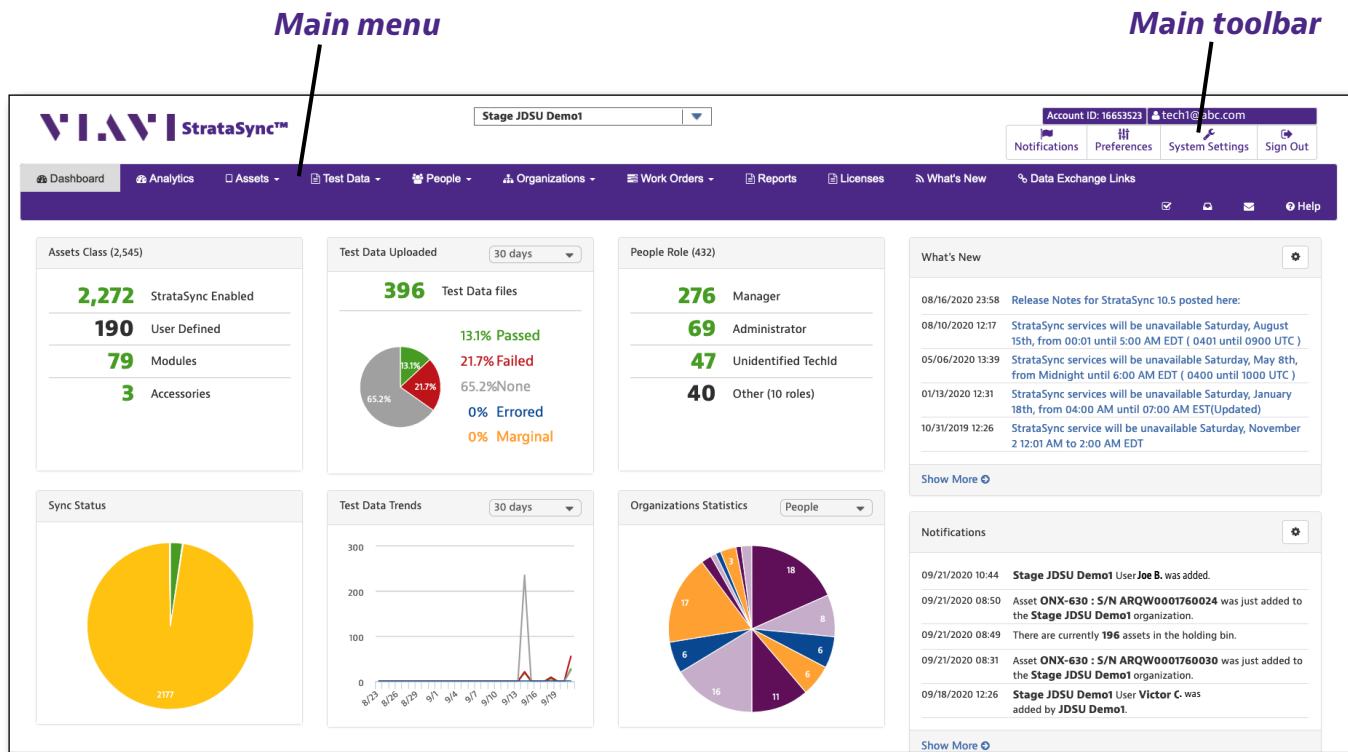
The dialog box titled 'RESET PASSWORD' contains the following text: 'Select a method and press next button to proceed'. There are two radio button options: 'Send password to user directly' (which is selected) and 'Show me password'. At the bottom right, there are 'Done' and 'Cancel' buttons.

The dialog box titled 'Temporary Password' displays the following information: 'Username: abc@jdsu.com' and 'Temporary Password: ^%d#4gM2'. A 'Done' button is located at the bottom center.

Setting up StrataSync

For more detailed information on configuring and managing the system for administrators, see ["Configuration" on page 271](#).

StrataSync visual overview



StrataSync Main Dashboard

Navigation

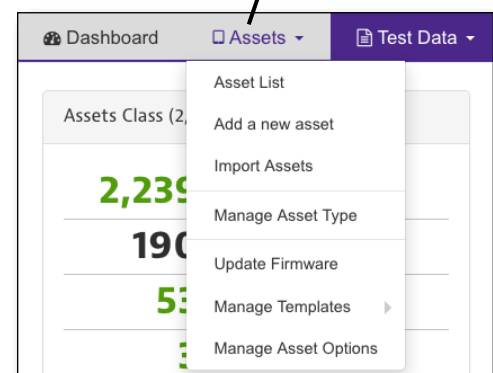
Most of the navigation in the StrataSync System is done through the **Main menu tabs** (purple menu at the top of the screen) and the **Main toolbar** (menu at the top right corner of the screen), as shown above.

Main menu

Select the tabs within the Main menu to open dropdown menus to navigate between the **Main Dashboard** (home page), **Analytics**, **TPA**, **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



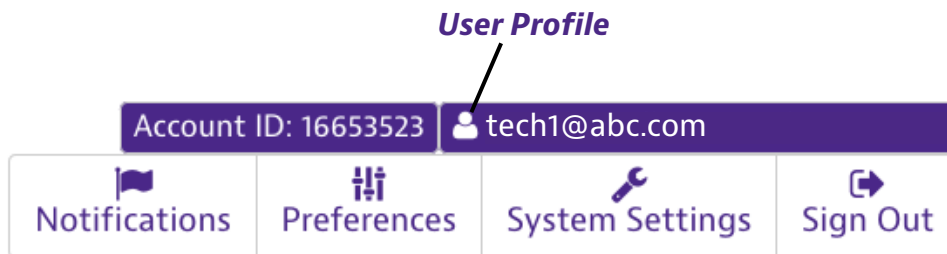


NOTE:


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 271.

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 271.

Sign Out  – Signs out the current user.


StrataSync Basics

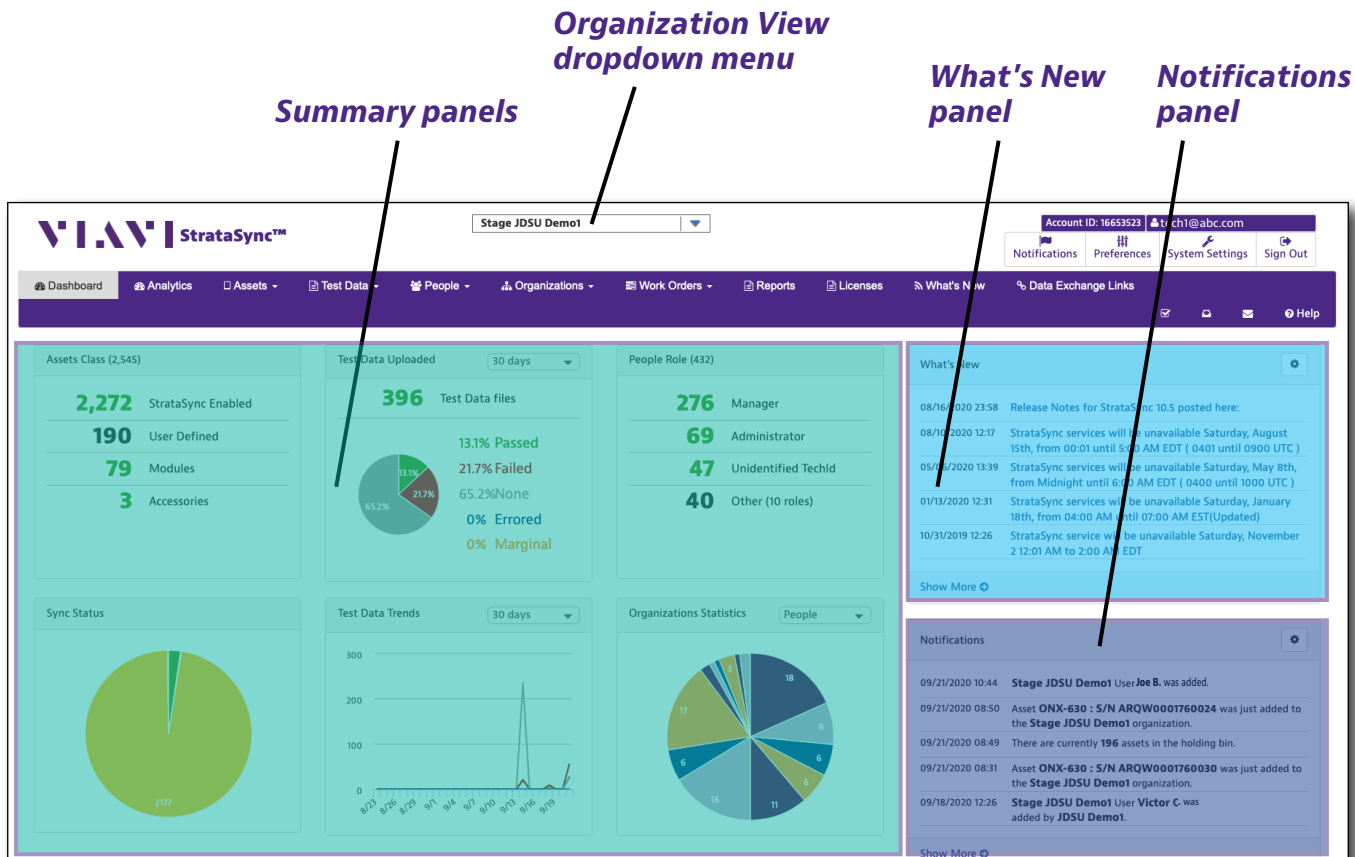
This chapter covers how to use the StrataSync System, including the following:

- "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.

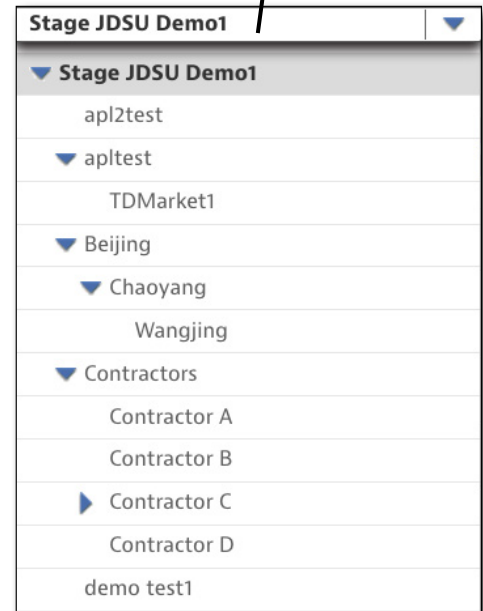
Changing the Organization View

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



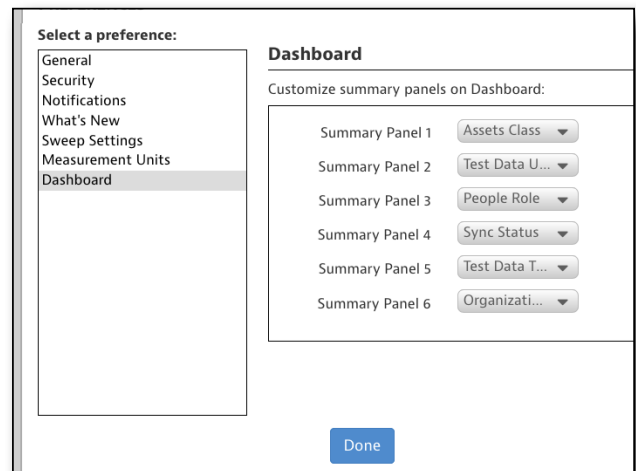
Customizing your summary panels

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 271.



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.

Note: The asset count displayed in this panel includes assets in the Holding Bin.

Assets Class (2,485)	
2,239	StrataSync Enabled
190	User Defined
53	Modules
3	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.

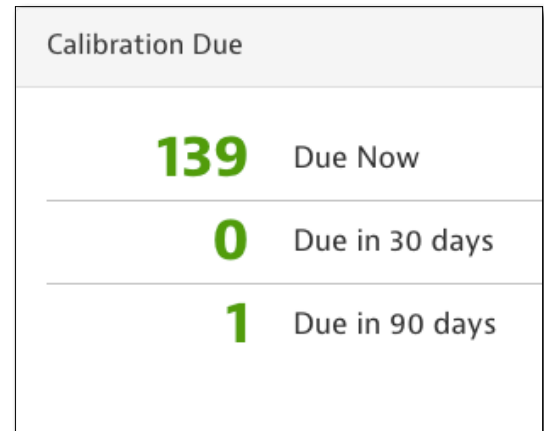
Asset Status	
2290	Active
0	Calibration
1	Repair
0	Loaned
2	Others

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.



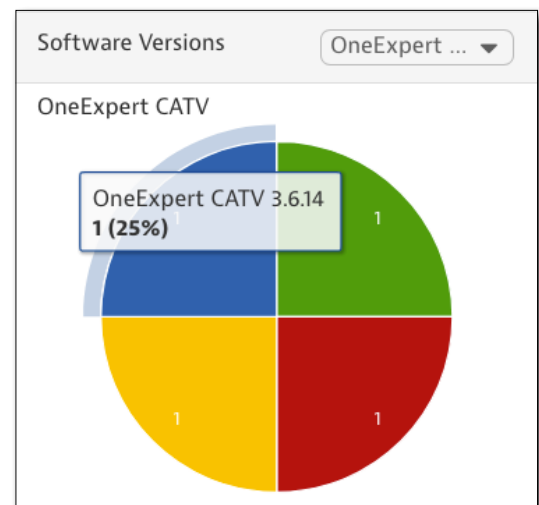
Software Versions panel

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.

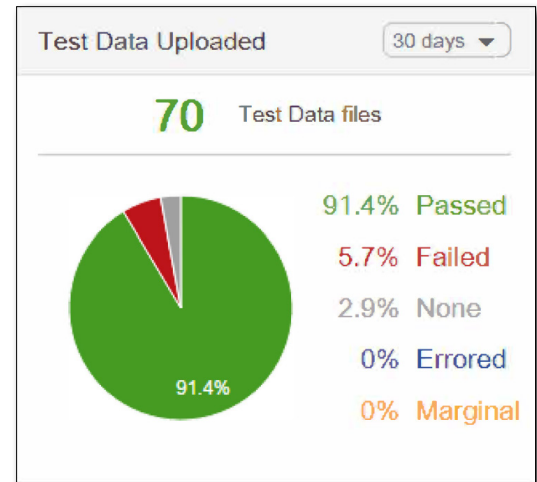
It is updated in real time. Refresh your browser to get the most recent view.



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:

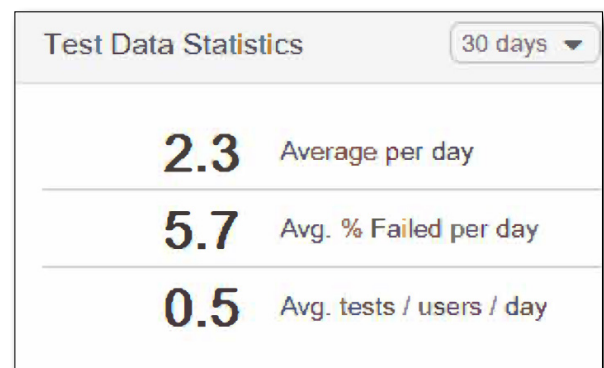
Times shown in StrataSync correspond to your local time zone, no matter where the device was synced from. Upload times are listed, not when tests were run.

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).



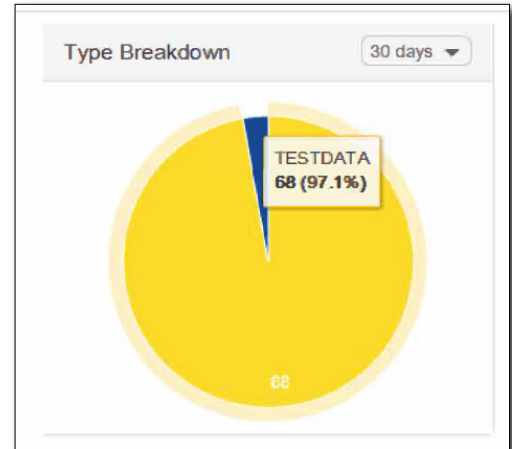
Test Type Breakdown panel

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.

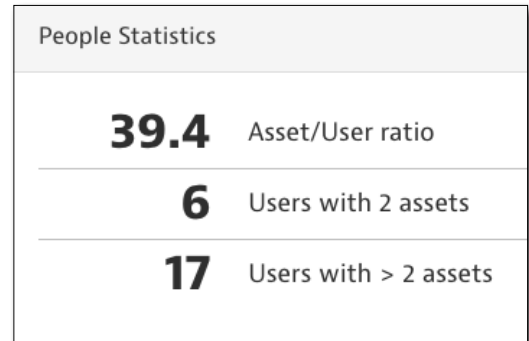
It is updated in real time. Refresh your browser to get the most recent view.

People Role (418)	
276	Manager
58	Administrator
45	Unidentified TechId
39	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.



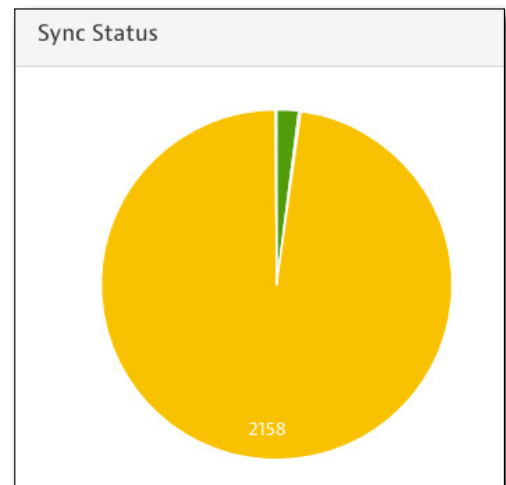
Sync Status panel

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.

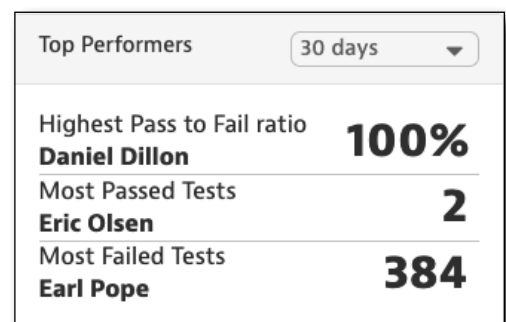


Top Performers panel

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).



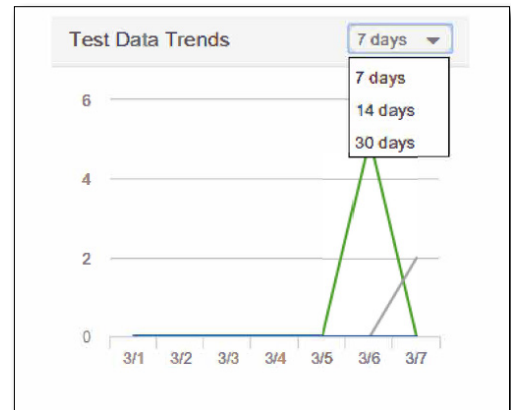
Test Data Trends panel

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).



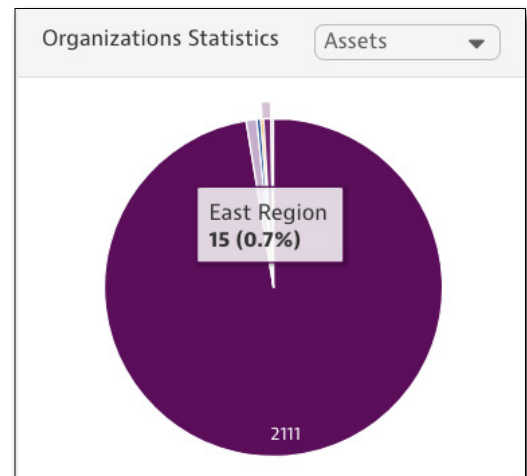
Organizations Statistics panel

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.

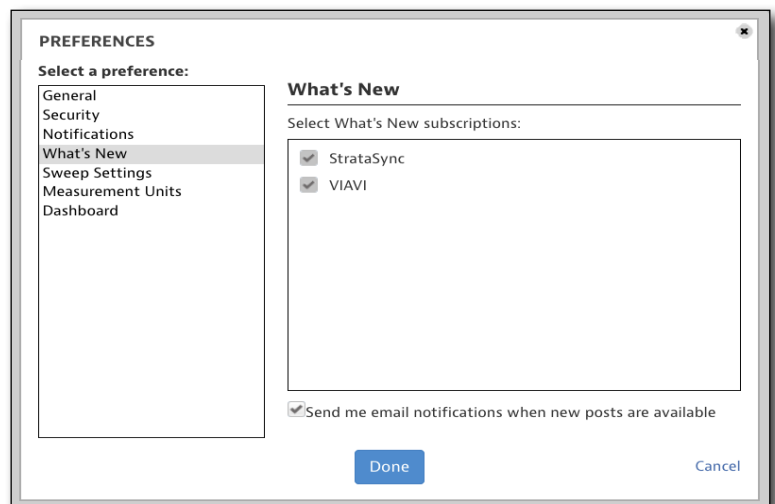
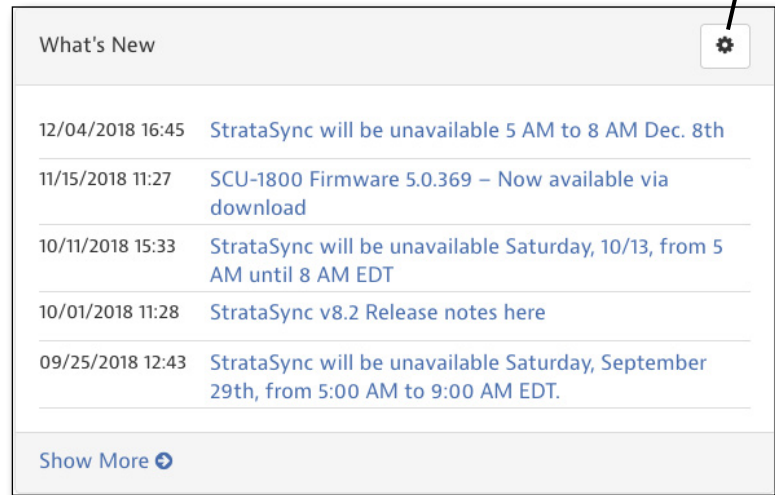
The available types of what's new categories are set up by your StrataSync Administrator.

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




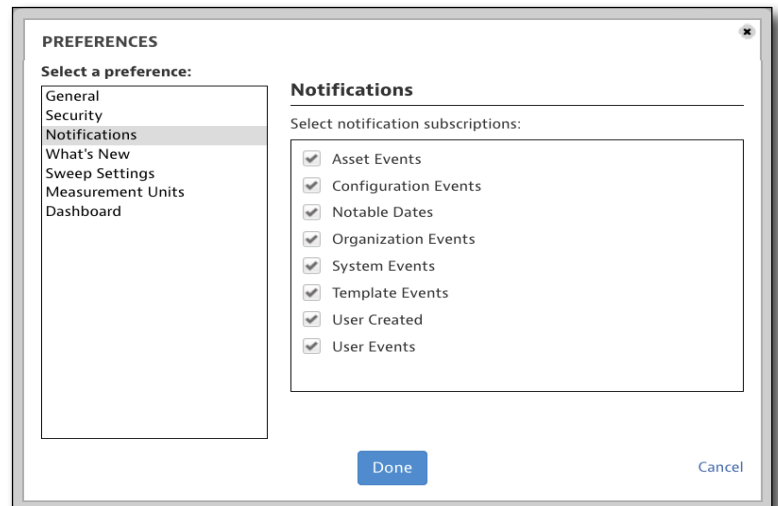
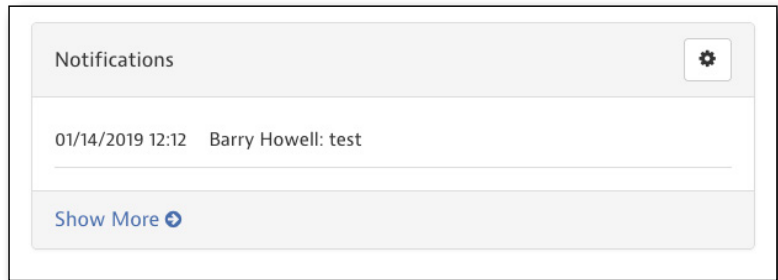
Notifications panel

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 281.

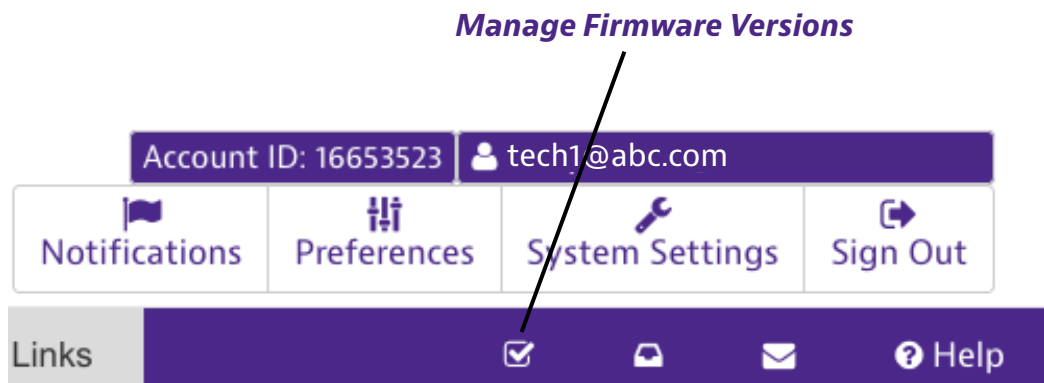
Firmware management allows you to limit the enterprise/account visibility of new firmware releases that are generally available from StrataSync. This design allows for testing and approval of the firmware before it is deployed to the entire field.

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

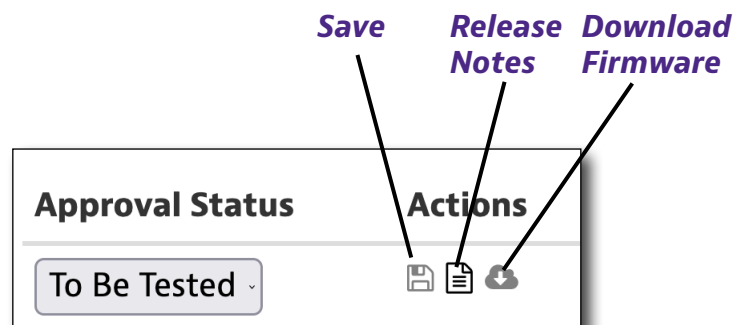
Asset Type: OneExpert CATV

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**.



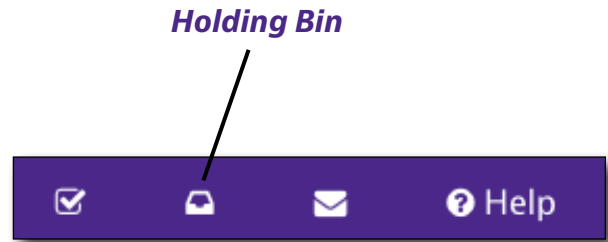
Holding Bin

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 interface. 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, including OneExpert DSL, HST-3000, DSAM, and CLI/Leakage Equip (All) assets.

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	ARQA000555001	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			1515788			
CLI/Leakage Equip (All)	Trilithic Seeker	68174	68174			1520880			
CLI/Leakage Equip (All)	Trilithic Seeker	69557	69557			1521621			

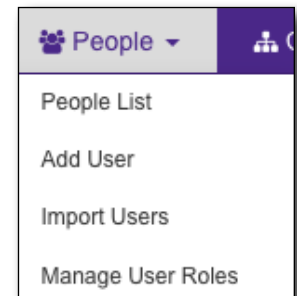
StrataSync Holding Bin in the Assets List

Moving assets from the Holding Bin

Field test instrument assets will automatically reassign when connected via VIAMI Mobile Tech or by performing a direct sync from the instrument. Alternatively, an asset may be assigned to a user in the organization inventory from the holding bin.

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 179*, 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

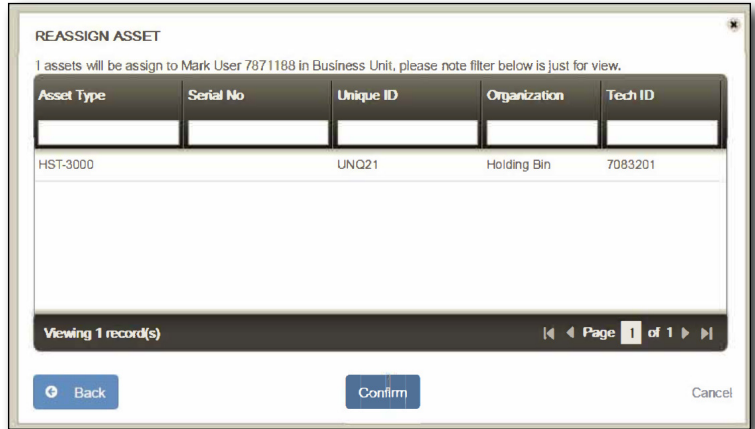
Reassign Cancel



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**.



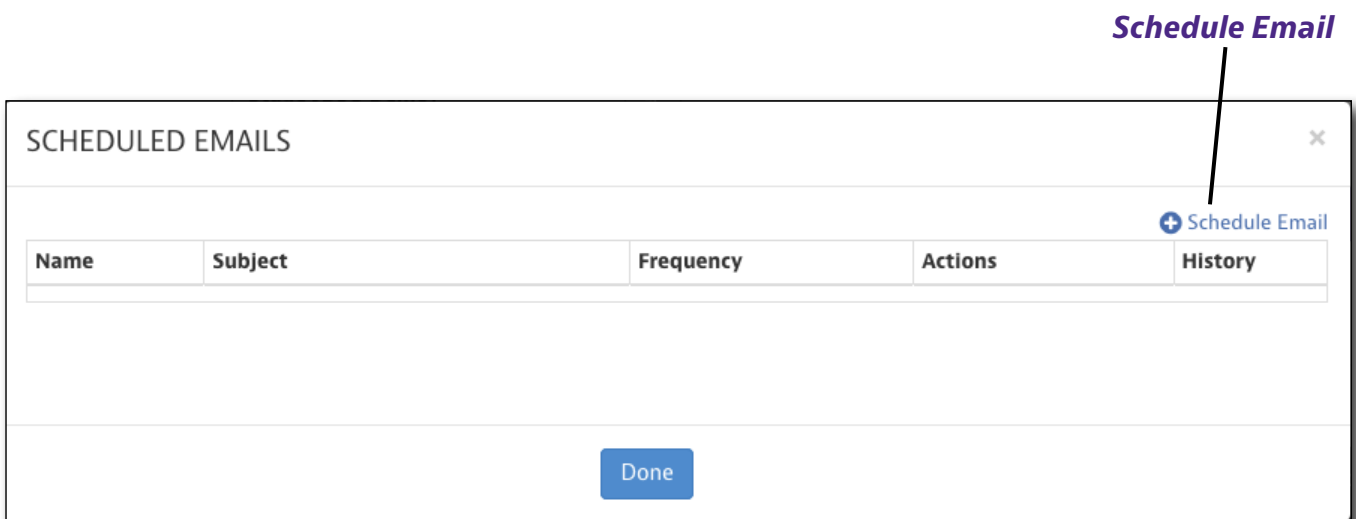
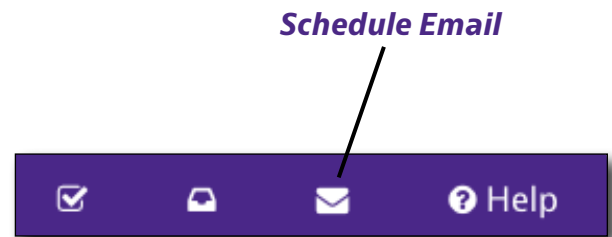
Scheduling emails

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.

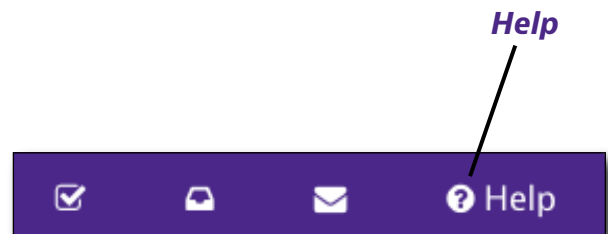
You can edit, delete, or view the history here later, as well.

Name	Subject	Frequency	Actions	History
Brian's Org View	StrataSync View - Brian's Org View - ASSET_LIST	Daily	Edit Delete	History

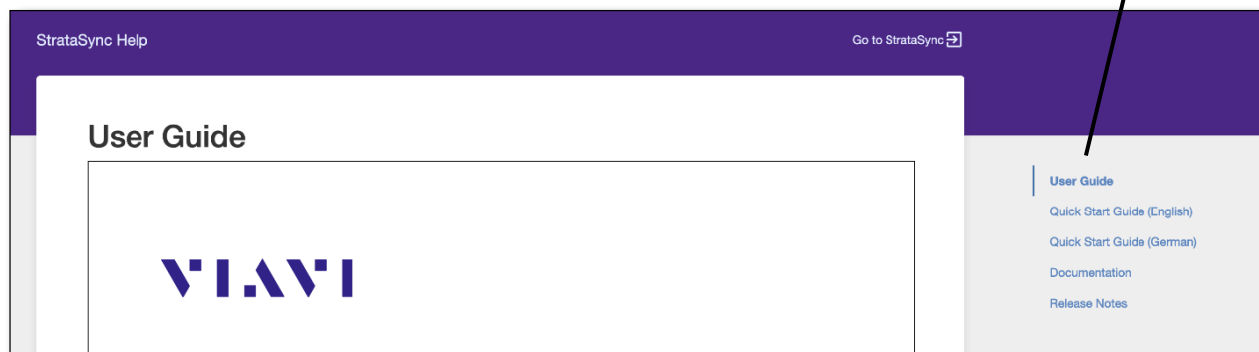
Help

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

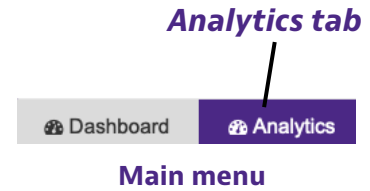
This chapter covers how to use the Analytics features of StrataSync, including the following:

- "Analytics" on page 50
- "Searching" on page 60
- "Sorting" on page 60
- "Views" on page 61
- "Exporting files" on page 62
- "Saving dashboards" on page 63

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.

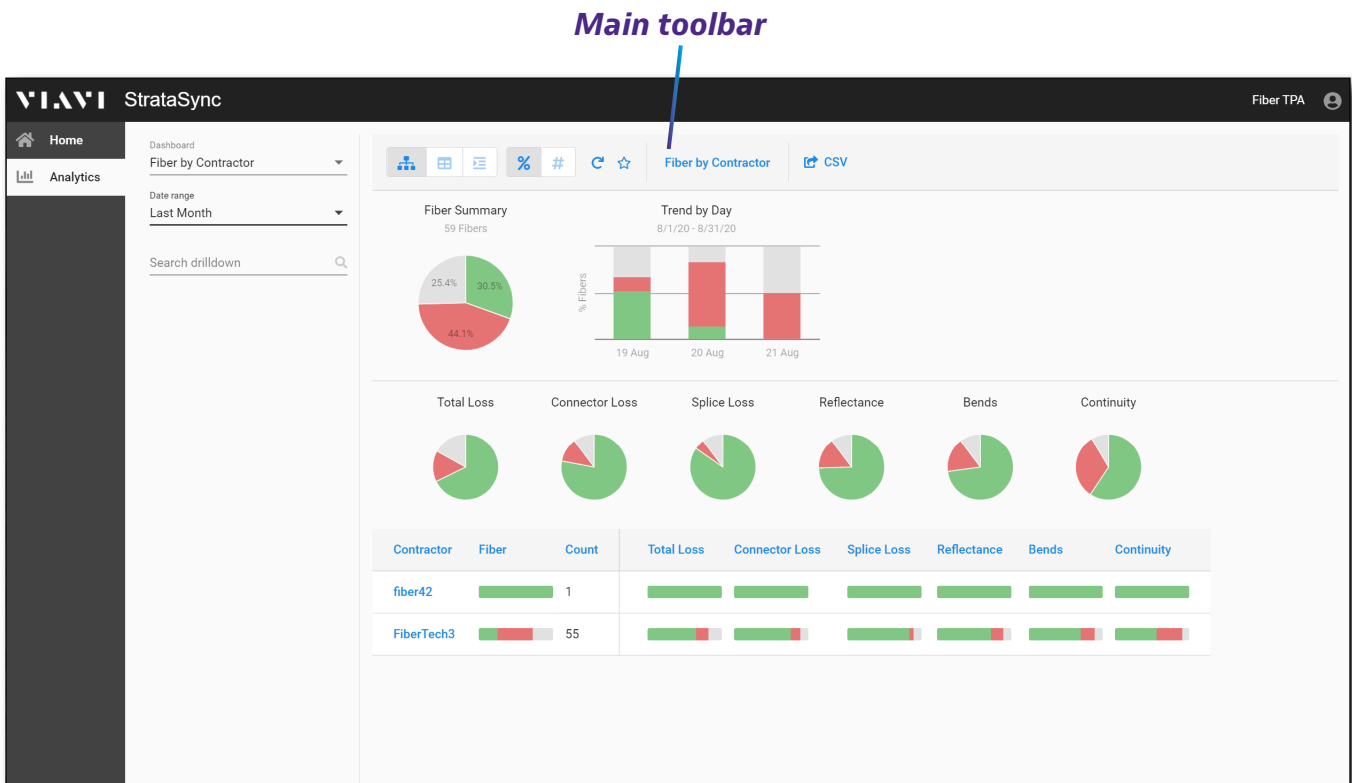


Note: This feature requires the StrataSync ANALYTICS subscription plan at a minimum.

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 'contractorld' 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 Dashboard

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.

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.

**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.

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 for a '5G Closeout Test'. The dashboard includes a sidebar with navigation options like 'Home' and 'Analytics', and a search dropdown. The main content area displays a table of test results. The table has the following columns: Site, Band, Sector, Cable, Termination, Type, Test Time, Trace Min, Trace Max, and DTF Length(m). The data rows show various test results for different cell sites, including parameters like 'aws', 'Beta', 'Gamma', and 'Short' terminations, along with specific test times and 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

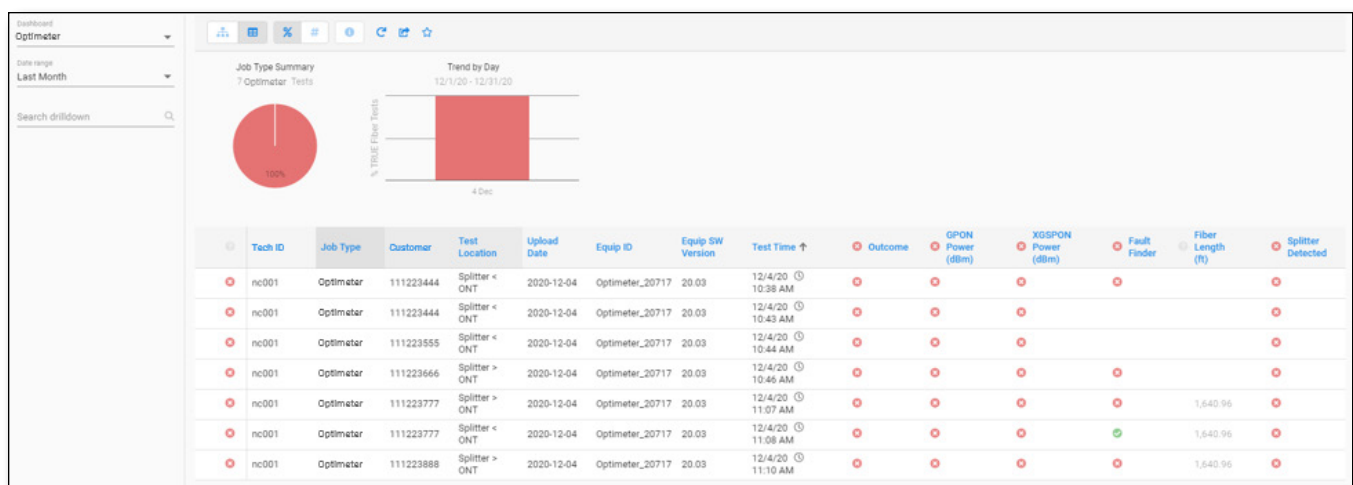
By default, the **Optimeter Dashboard** supports viewing Optimeter test results aggregated according to the organizations configured in the StrataSync account, and the 'techId' indicated in the received test results. The dashboard displays and aggregates pass/fail indicators based on the criteria used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

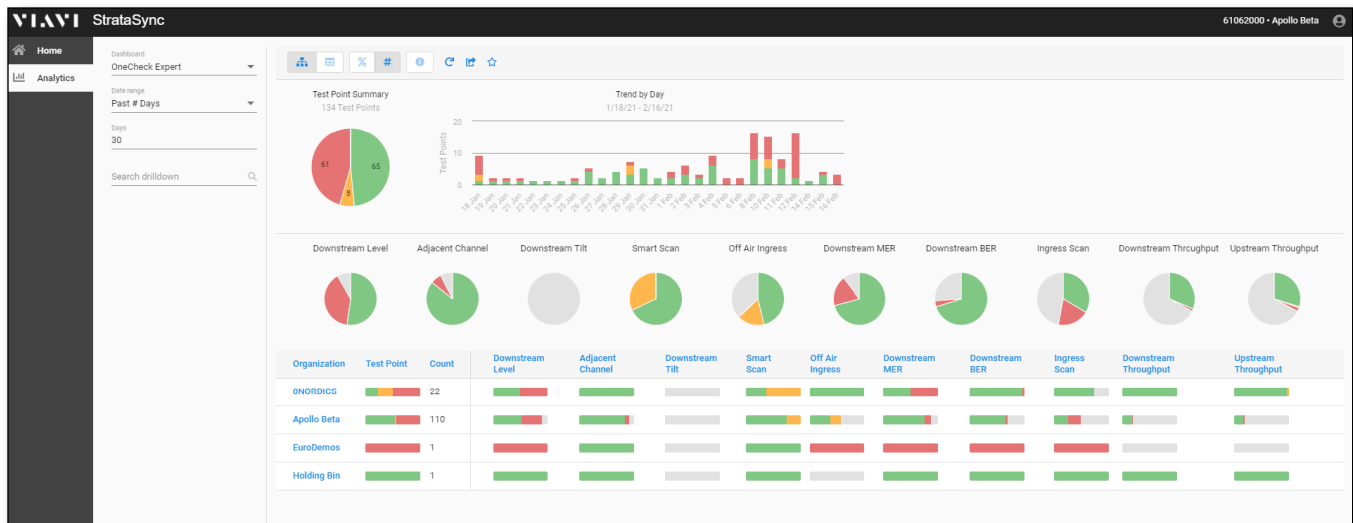
The CATV Dashboards allow you to view closeout reports and testing results in the field using the ONX-6xx (ONX CATV) instruments.

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.

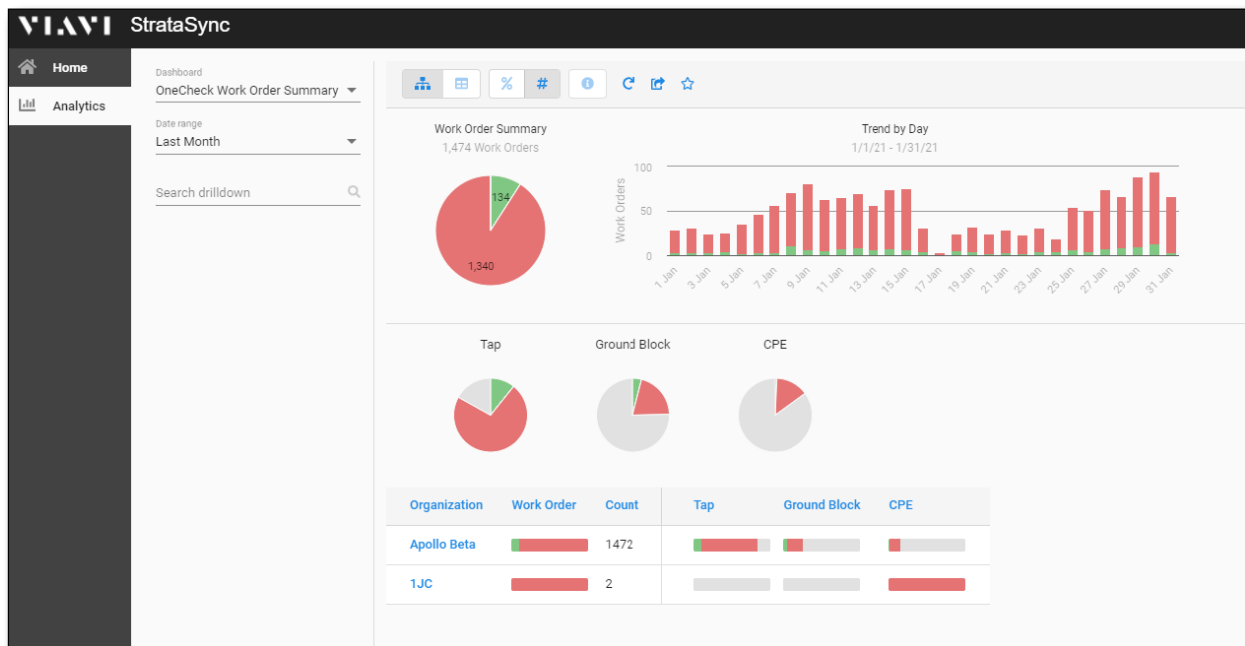


OneCheck Expert Dashboard

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.

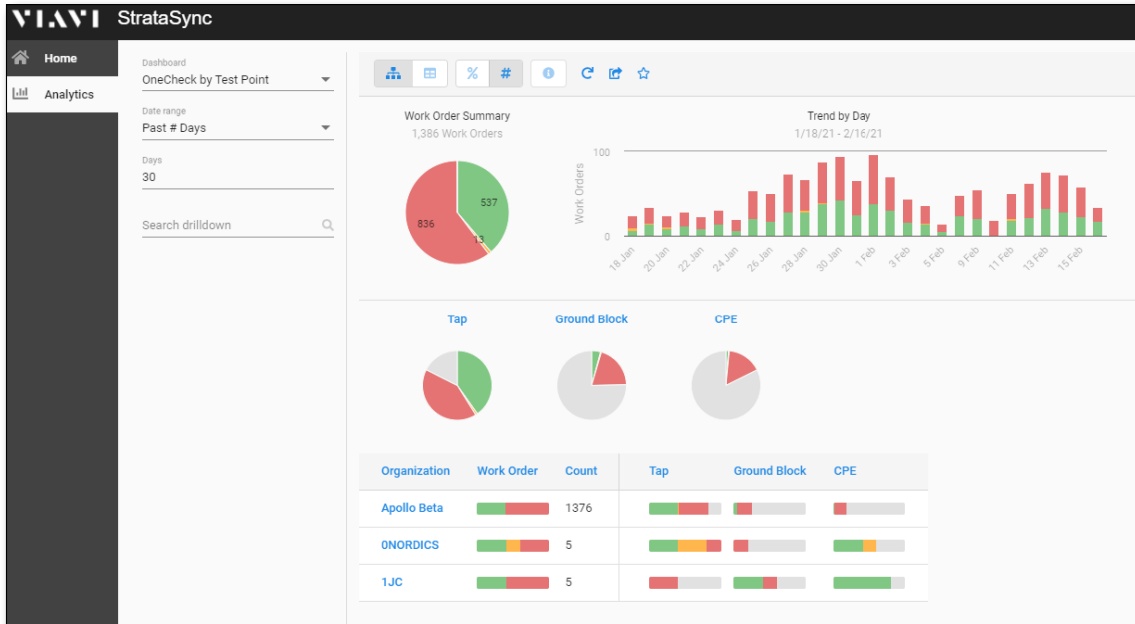
The tabular view starts by further breaking down the results by organization, then clicking on an organization will give a breakdown by technician, and finally clicking on a specific technician will break out the test results per-workorder with per-test location pass/fail status and links back to the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



OneCheck Work Order Summary Dashboard

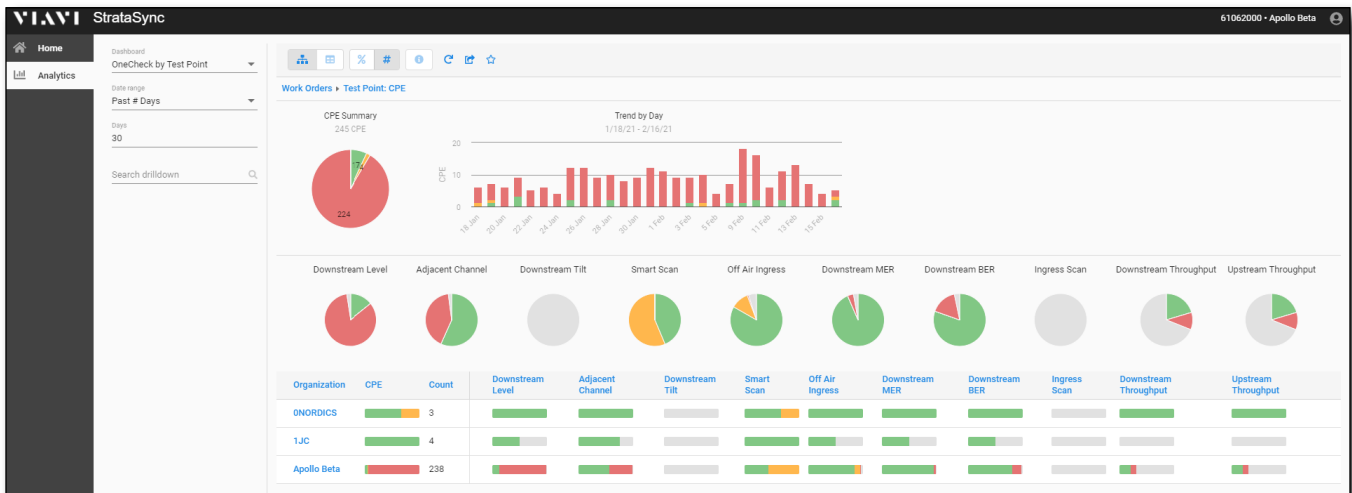
OneCheck by Test Point

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

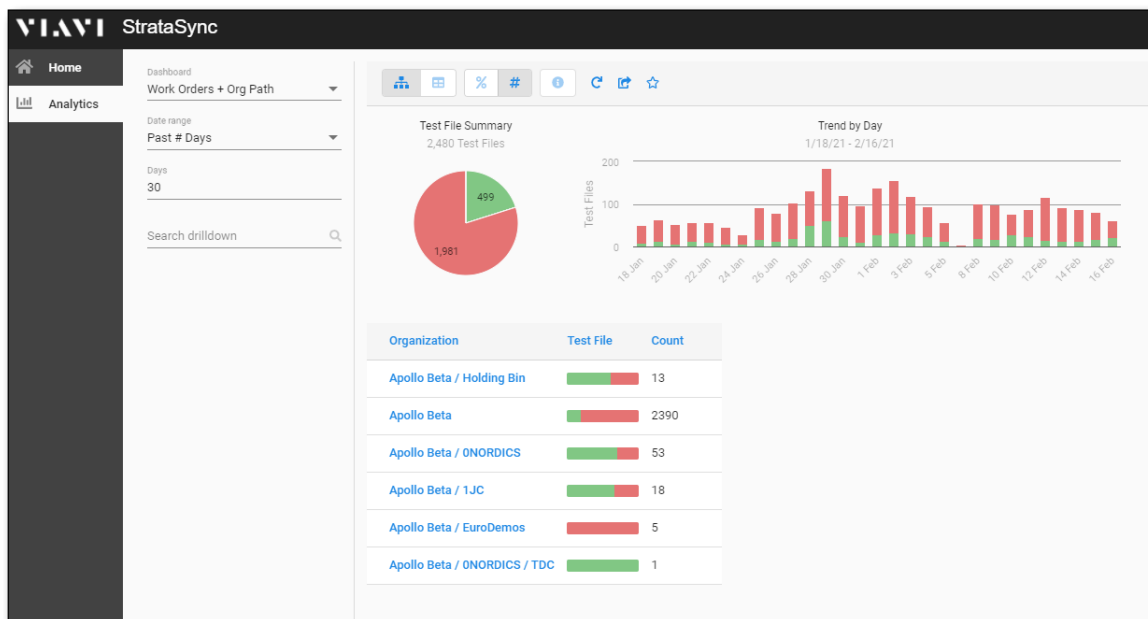
In the example below, the user drilled-down on the 'CPE' location, which then modifies the view to show detailed metrics for results taken at the CPE. Users can then drill-down by organization and technician as with the previous dashboards.



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.

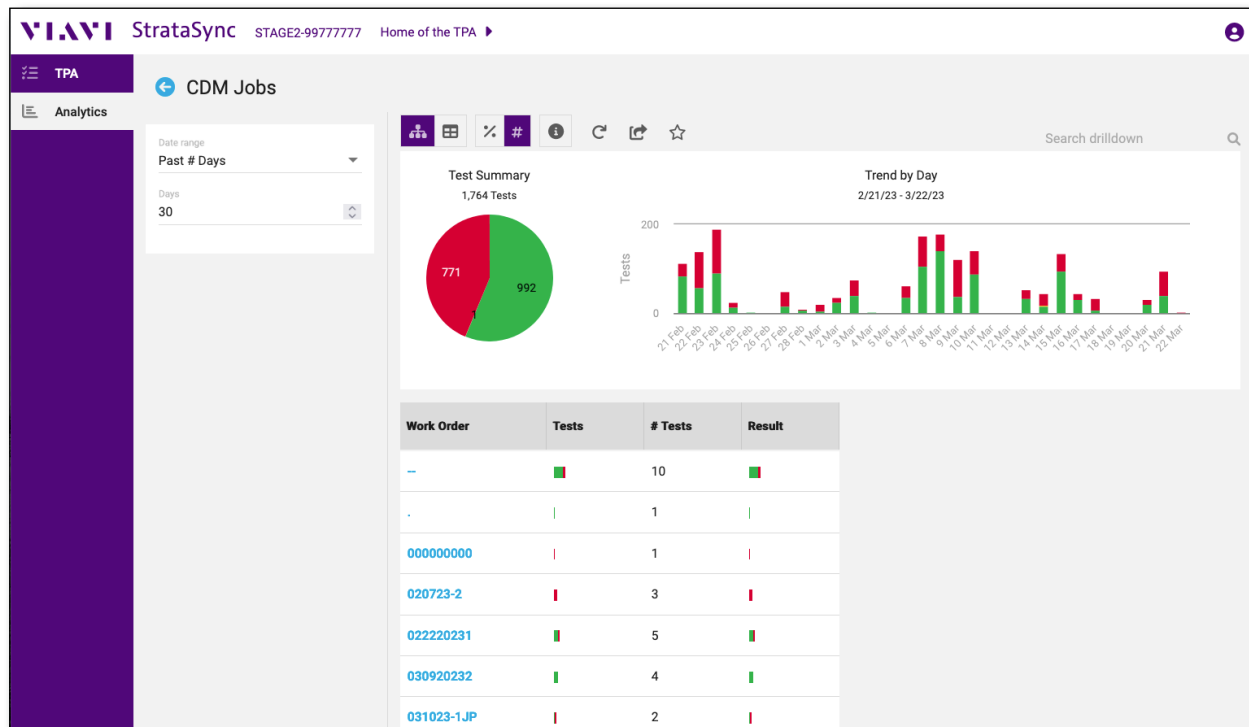
Analytics Dashboard

The **Analytics Dashboard** supports work order-associated CDM (Common Data Model) JSON-formatted test results from any VIAVI test instrument.

From the Job Manager dashboard, select the **Analytics** tab on the left to show the Reports List. Here, you can choose a report to show the individual dashboard.

Report	Organization Owner	Last Updated	Tags
CDM Jobs	Home of the TPA	2023-01-24	
CDM Tests by Type	Home of the TPA	2023-01-24	
CDM Tests by Type - 2	Home of the TPA	2023-03-07	
Combo TruePON and 1650nm tests	Home of the TPA / UseCase6 / VirginMedia UK	2023-01-26	
Fiber Closeout - Bidirectional	Home of the TPA	2023-01-26	
Fiber Closeout - Unidirectional	Home of the TPA	2023-01-26	
FIberio & number & wavelength report with hiDirOTDR events	Home of the TPA	2023-01-26	
FIberio & number & wavelength report with unidIROTDR events	Home of the TPA / UseCase2 / UGG	2023-02-13	
FIberio & number & wavelength report with unidIROTDR events	Home of the TPA	2023-01-26	
FIberio & number & wavelengths bad events hiDirOTDR analysis	Home of the TPA	2023-01-26	
FIberio & number & wavelengths bad events unidIROTDR analysis	Home of the TPA / UseCase2 / UGG	2023-02-13	
FIberio & number & wavelengths bad events unidIROTDR analysis	Home of the TPA	2023-01-26	

Analytics Reports List



Analytics Dashboard

This view highlights the overall pass/fail status for work order-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.

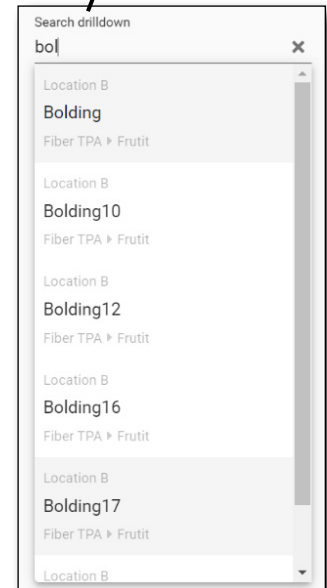
Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/ Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results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

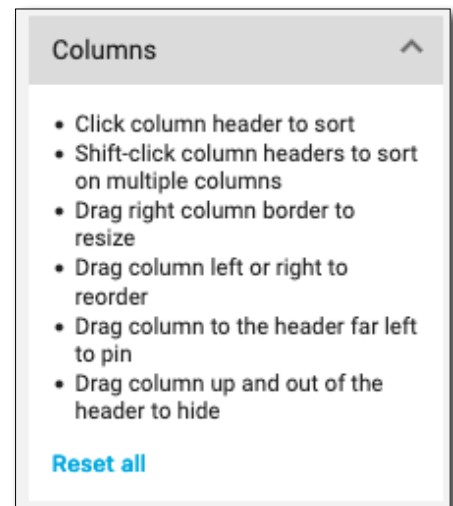
Search drilldown



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.



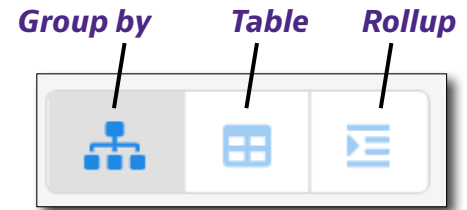
Views

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:

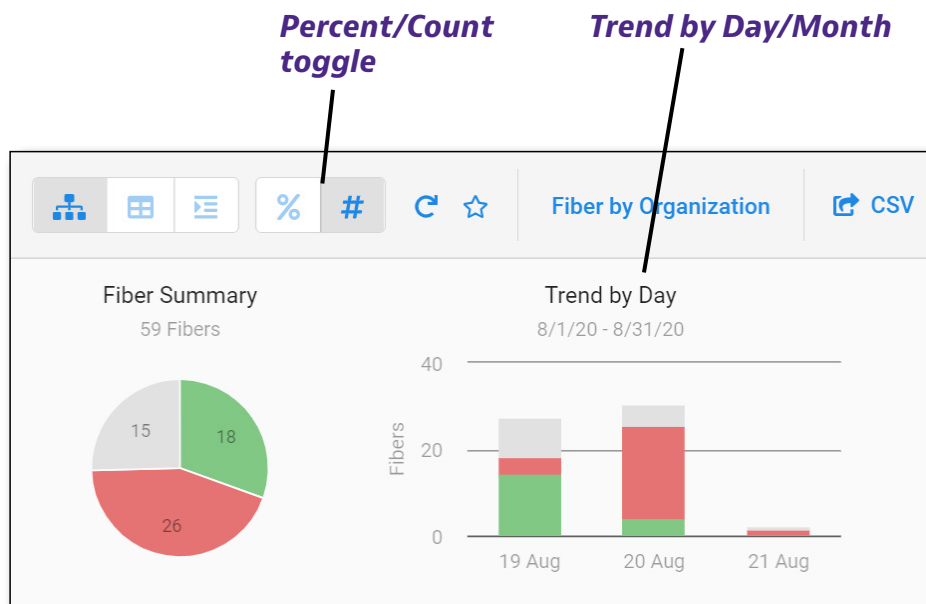
- **Group by** – Top-level aggregation object (e.g. organization)
- **Table** – Commonly aggregated object (e.g. 'Fiber' or 'Site')
- **Rollup** – Tabular drilldown view



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.

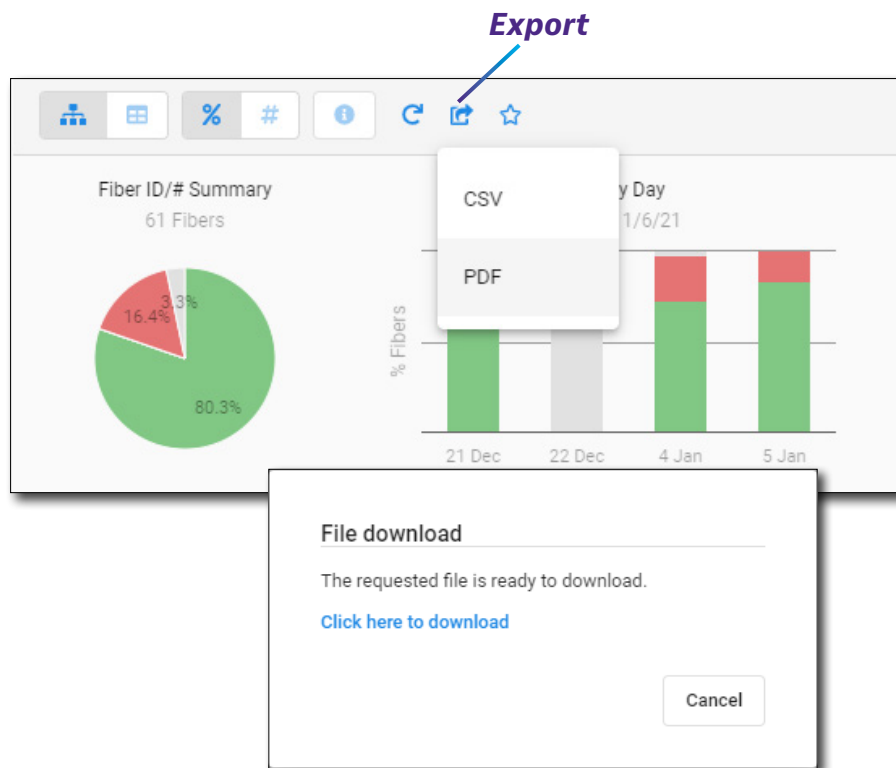


Exporting files

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.



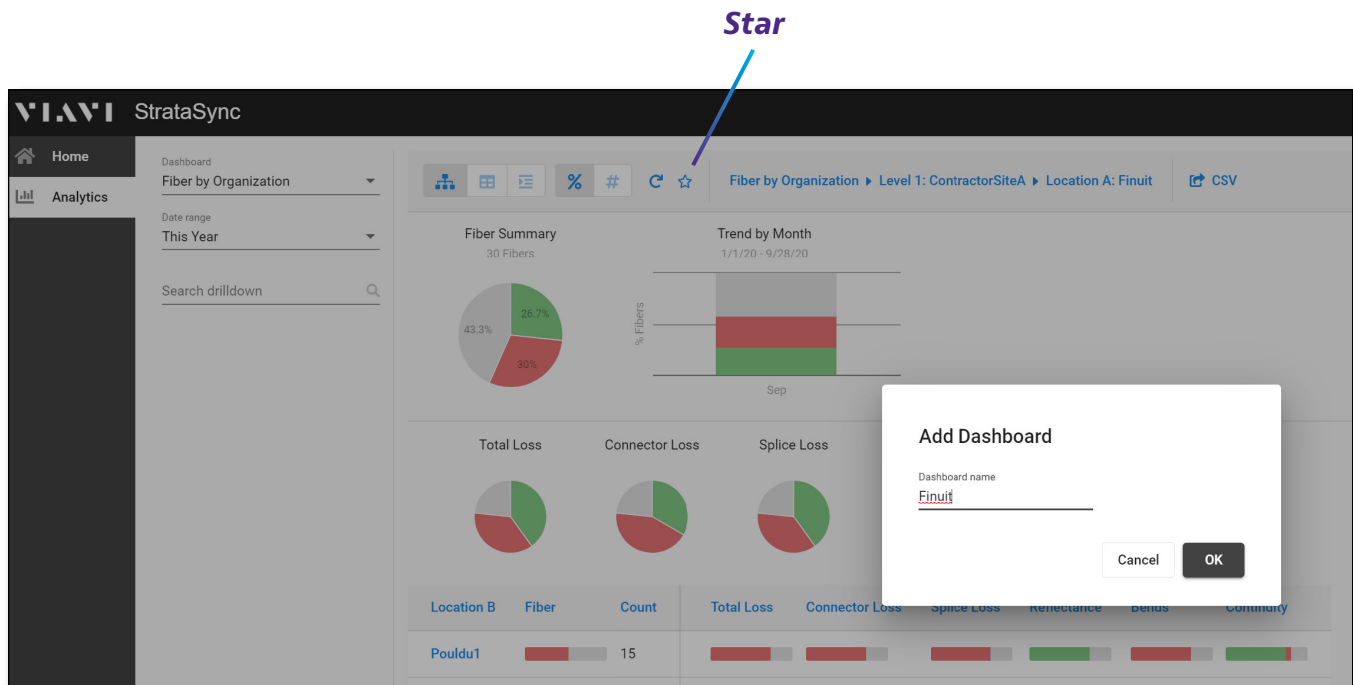
Level 1	Location A	Location E	Fiber	Total Loss	Total Loss	Total Loss	Total Loss	Total Loss	Total Loss	Connecto	Connecto	Splice Los	Splice Los	Reflectan	Reflectan	Bends	Bends Sta	Continuity	Start Time	End Time
Contracto	Finit	Pouldu2	RACK4#1															pass	2020-09-11	2020-09-10T11:45:00.000Z
Contracto	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.

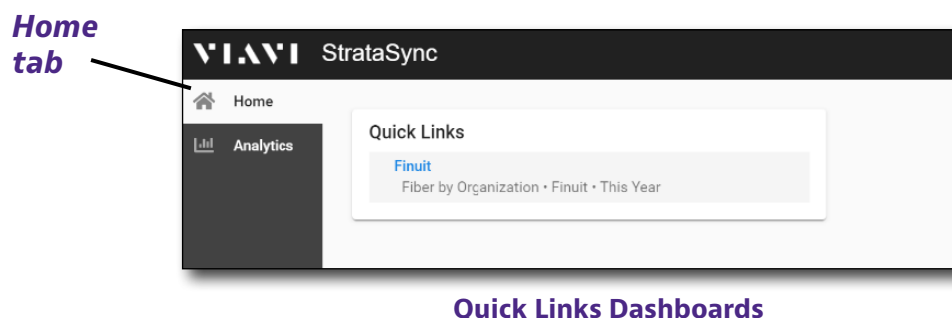
Select the **Star** in the Main toolbar. A pop-up comes up so you can name the dashboard, then select **OK**.



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**.



Test Process Automation

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

- "Test Process Automation" on page 66
- "Job Manager Dashboard" on page 68
- "Jobs List" on page 71
- "Creating a job" on page 73
- "Adding tests to a job" on page 75
- "Importing jobs" on page 80
- "Duplicating a job" on page 83
- "Approving a job" on page 87
- "Exporting a job" on page 87
- "Deleting a job" on page 87
- "Job Templates List" on page 88
- "Creating a job template" on page 89
- "Adding tests to a job template" on page 91
- "Duplicating a job template" on page 96
- "Creating a job from a template" on page 98
- "Deploying a job template" on page 101
- "Exporting a job template" on page 102
- "Deleting a job template" on page 102
- "Creating reports" on page 102
- "Analytics Dashboard" on page 103

Test Process Automation

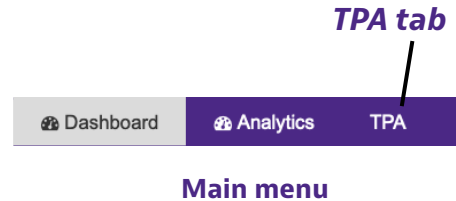
Test Process Automation (TPA) is a cloud-based workflow solution for teams that build, test, and deploy network services.

Powered by StrataSync, TPA connects teams and their test instruments together to ensure alignment, efficiency, and accuracy at every stage of a job.

From the Main menu, click the **TPA** tab to see **Job Manager**, **Job Templates**, and **Analytics** detail for instruments in the field if configured for your StrataSync account.

Job is a more general term used to describe one or more tests/tasks performed by one technician, whether for service activation, fiber construction, or some other application. "Job" is used by VIAVI for CDM 2.2. See the TPA API Guides for details ([Test Results](#) and [Jobs](#)).

TPA requires either of following active licenses: SS-PRO-nYR or SS-ENT-WRKFLW-nYR.



Job Manager Dashboard

Job progress

- 65 Active jobs
- 0 Errored jobs
- 75 Approved jobs

Job status

- Started 24 of 65
- Assigned 8 of 65
- Deployed 27 of 65
- In Progress 4 of 65
- Completed 2 of 65

Job status pie chart: 6.2% (red), 90.8% (green), 7 (Overdue jobs, yellow)

Workor...	Tech	Schedu...	Due date	State	Progress	Status	Created...	Created...	Template
JobTest001	sadmin1	1/30/24		Assigned	0 of 10097	?	1/30/24 9:32 AM	sadmin1@2106	10000 plus test locations
test2222	Team 12	1/25/24		Assigned	0 of 1	?	1/25/24 4:20 PM	santhi@9911111	Manual Step Root Org
Test 2-1-1	Team 3	1/25/24		Assigned	0 of 1	?	1/25/24 4:18 PM	santhi@9911111	Manual Step Root Org
sdfsdfsdfs		1/25/24		Started	0 of 3	?	1/25/24 1:20 PM	santhi@9911111	Manual Step
testwww		1/25/24		Started	0 of 3	?	1/25/24 1:19 PM	santhi@9911111	Manual Step
job2	Team 12	1/25/24		Assigned	0 of 3	?	1/25/24 1:11 PM	santhi@9911111	Manual Step
test1	approvejob1	1/25/24		Assigned	0 of 3	?	1/25/24 12:52 PM	santhi@9911111	Manual Step
Onetest		1/25/24		Started	0 of 3	?	1/25/24 12:40 PM	santhi@9911111	Manual Step
testtest from wfan		1/25/24		Started	0 of 4	?	1/25/24 12:26 PM	santhi@9911111	Manual Step

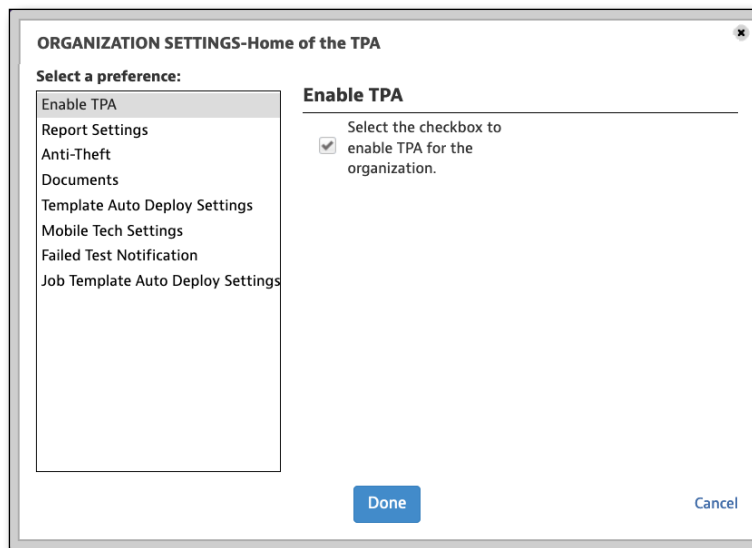
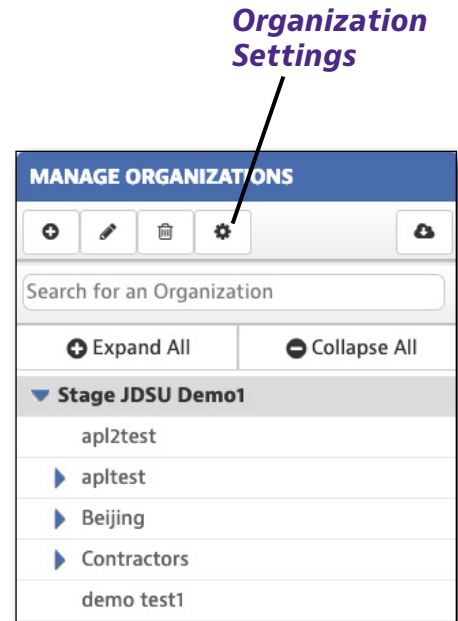
Job Manager Dashboard

Setting up TPA

With an active license, TPA must be enabled at the root organization (if desired for entire StrataSync account) or specific sub-org levels.

1. From the main menu, select **Organizations**. The Organizations List screen appears.
2. From the Organization List screen, select the organization level you want to enable TPA under the **Manage Organizations** tab.
3. Select the **Organization Settings** button at the top. The Organization Settings screen appears.
4. Select **Enable TPA**, and check the box to enable it. Then select **Done**.

For more details, see *"Enable Test Process Automation (TPA)" on page 227*.



Organization Settings screen – Enable TPA

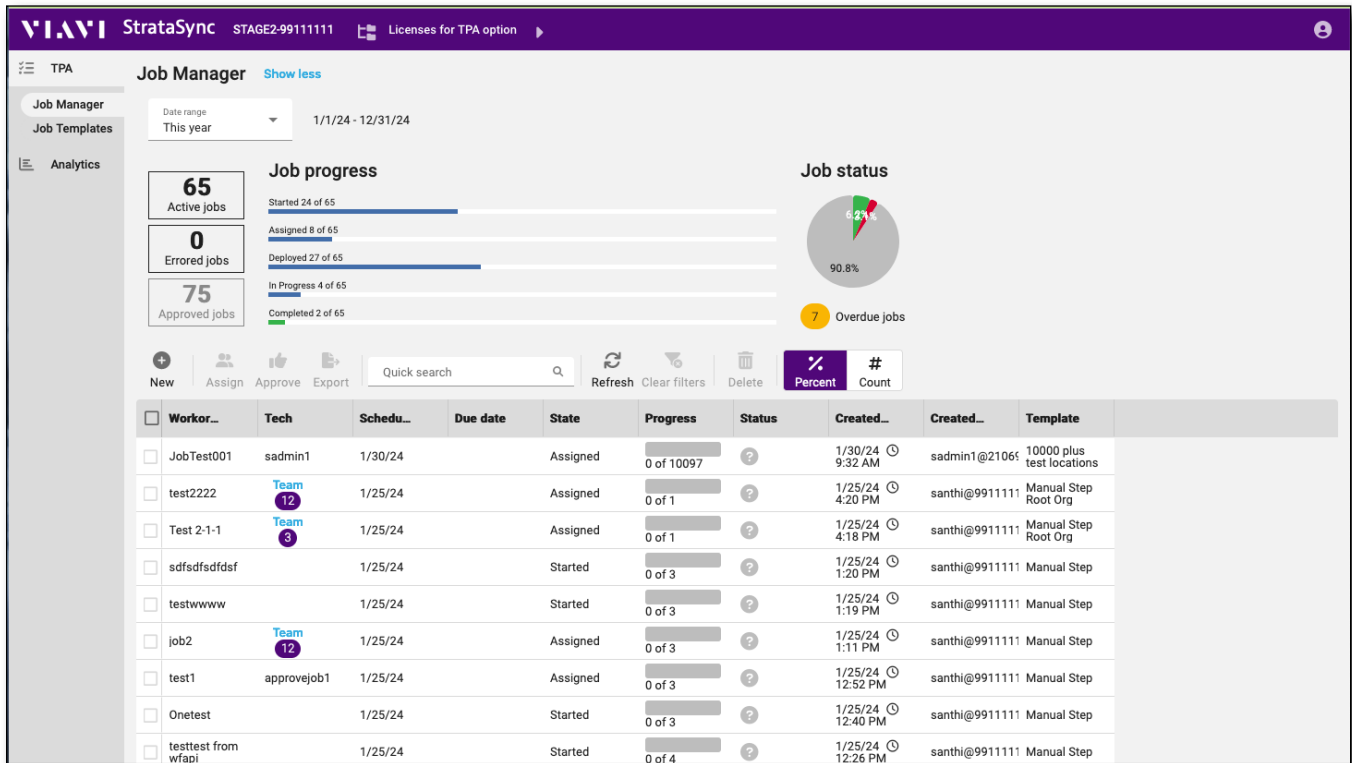
Job Manager Dashboard

The **Job Manager Dashboard** shows **Job Progress**, **Job Status**, and the **Jobs List** of VIAVI test instruments managed by your StrataSync account.

In conjunction with VIAVI Mobile Tech and the job manager on the test instrument, job details are updated as information is received from the field, in almost near-real-time.

And as is reflected on the instrument and Mobile Tech, pass/fail results are captured on the dashboard, and when drilling down, includes in-progress results for each required test.

Click the **TPA** tab in the Main menu to bring up the Job Manager Dashboard.



Job Manager Dashboard

The Job Manager dashboard shows "non-approved" jobs. By default, it only shows the jobs which are 'started', 'assigned', 'deployed', 'in progress' and 'completed'.

Click any of the elements to filter the jobs list for corresponding detail. For example, in the **Job progress** chart, choose **Approved jobs** to see those jobs filtered below; in the **Job status** chart, choose **Incomplete** to see those jobs filtered below. Click **Active jobs** to clear the filter.

This dashboard allows customers to visually track the progress of 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.

This feature requires the StrataSync PRO subscription plan at a minimum.

**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.

**NOTE:**

TPA features require the appropriate roles/permissions in StrataSync (e.g. Job Management and Job Templates).

See "[Managing user roles](#)" on page 203 for details.

**IMPORTANT:**

Admin users associated with an organization at a higher level than a sub-organization where TPA is enabled, will not see the TPA sub-menu from the existing StrataSync web UI to access the new TPA UI.

Create a new user profile associated with the TPA-enabled organization and login with this profile to access the new TPA UI. See "[Adding a user](#)" on page 195.

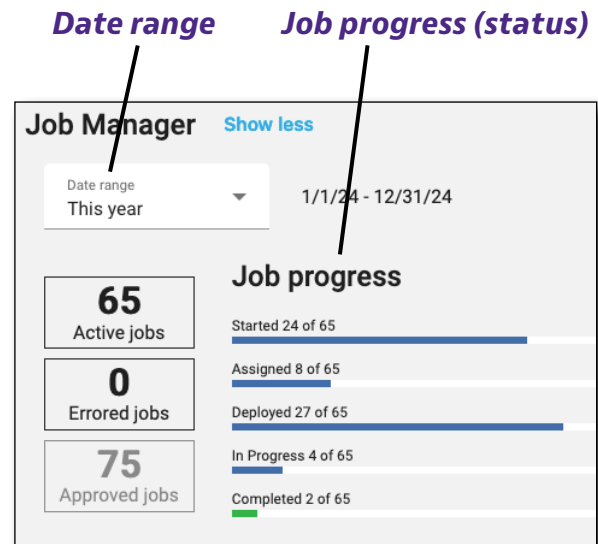
Job progress chart

The **Job progress** chart shows total active jobs, approved jobs, errored jobs, and the state of each job.

By default, the job progress chart is collapsed. To show or hide the detail, select **Show More / Show Less** at the top.

Click any of the elements to filter the jobs list for corresponding detail.

Change the date range using the filters at the top and click **Apply**.



Job status chart

The **Job status** chart shows jobs that have passed, failed, are incomplete, or overdue. Hover over a category for more detail.

By default, the job status chart is collapsed. To show or hide the detail, select **Show More / Show Less** at the top.

The job status indicates the current status of the job, even if it's not complete. For example, if a job has 20 test locations, if no test has been performed, the job status is incomplete, or if all tested locations have not registered pass/fail criteria, the job as a whole will remain incomplete.

If the first test location is passed, then its status will be passed, and it will remain passed if the successive test locations are passed. If one test location has failed, then the job status will become red.

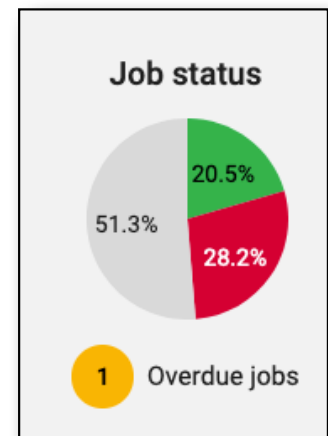
Click any of the elements to filter the jobs list for corresponding detail. Click **Active jobs** to clear the filter.

Colors

- **Red** – Fail
- **Green** – Passed
- **Gray** – Incomplete

Overdue jobs chart

The **Overdue jobs** chart shows when jobs are past their due date, and are now overdue.



Jobs List

The Jobs List provides detail on the current jobs, based on the filters used in the Job Manager dashboard.

Here you can also create new jobs, assign, approve, export to JSON, and delete jobs. See the following sections for detail on these features.

Use the column sort and filter dropdowns and search box to filter the data further. To clear all column filters, select **Clear filters**.

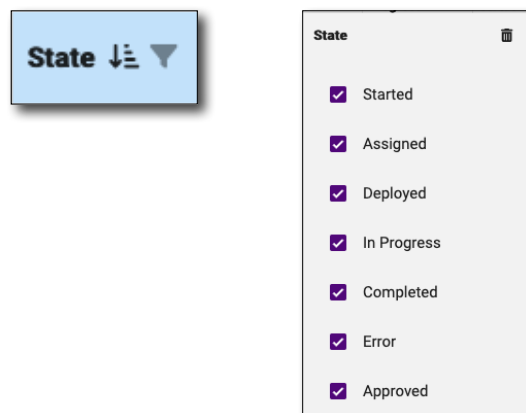
To refresh the Jobs List, select **Refresh**.

The screenshot shows the Jobs List interface with the following callouts:

- Search**: Points to the search box in the top toolbar.
- Refresh**: Points to the refresh icon in the top toolbar.
- Clear filters**: Points to the clear filters icon in the top toolbar.
- Filter**: Points to the filter icon in the top toolbar.

	Workord...	Tech	Schedule ...	Due date	State	Progress	Status	Create...	Created by	Template
<input type="checkbox"/>	sm future schedule date	st1	3/3/23		Deployed	0 of 1	?	1/31/23 5:50 PM	santhi.mungi@st	test-manual- step
<input checked="" type="checkbox"/>	toto	nb003	3/1/23		Deployed		?	3/1/23 5:01 AM	ONA-800_WMSRI nb003_first nb00:	Default Job
<input type="checkbox"/>	woierlsdfer	jn001	3/1/23		Deployed	0 of 8	?	3/1/23 9:35 AM	jimmy.perdue@st	Gigapower Install
<input type="checkbox"/>	1234567890	jn001	3/1/23		Completed	7 of 7 (100%)	✘	3/1/23 9:44 AM	justin.nagle@sta	UC1-TPA- demo
<input type="checkbox"/>	new-uc1- from-vmt_01	nc001	3/1/23		In Progress	3 of 5 (60%)	✘	3/1/23 10:17 AM	noel.clarke@stag	TPA Template UC-1
<input type="checkbox"/>	vmtjob 1d	am001	3/1/23		Deployed		?	3/1/23 12:31 PM	anup.mathur@st:	Default Mobile Job
<input type="checkbox"/>	NC-uc1-test2	nc001	3/1/23		In Progress	2 of 6 (33%)	✘	3/1/23 12:59 PM	noel.clarke@stag	UC1-PF2- Basic3

Jobs List



Column sort filters and dropdowns

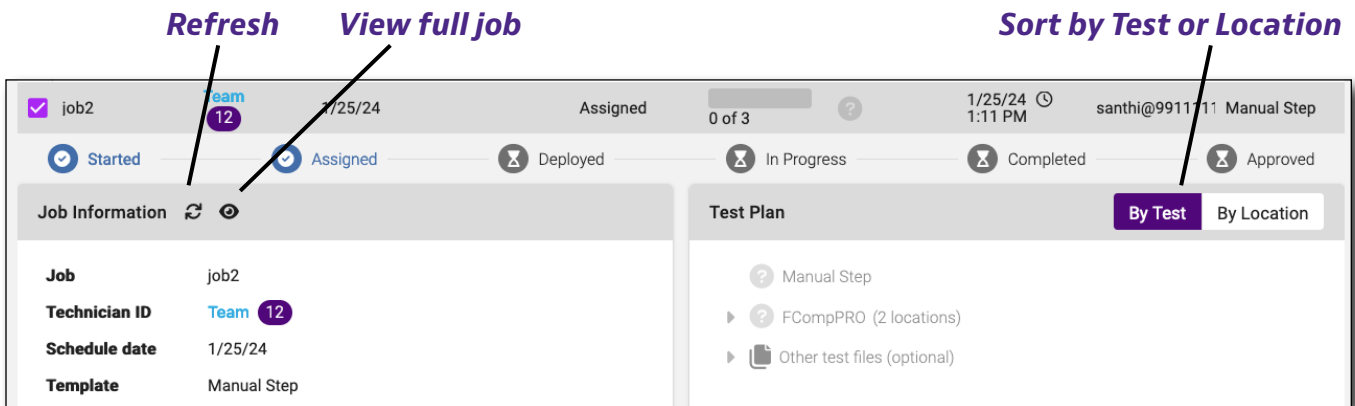
Click on a job line to expand and see additional job details, including job state, technician assigned, schedule, template, test locations, and test plans.

- In the Test Plan section, use the **By Test** or **By Location** tabs to sort the tests.

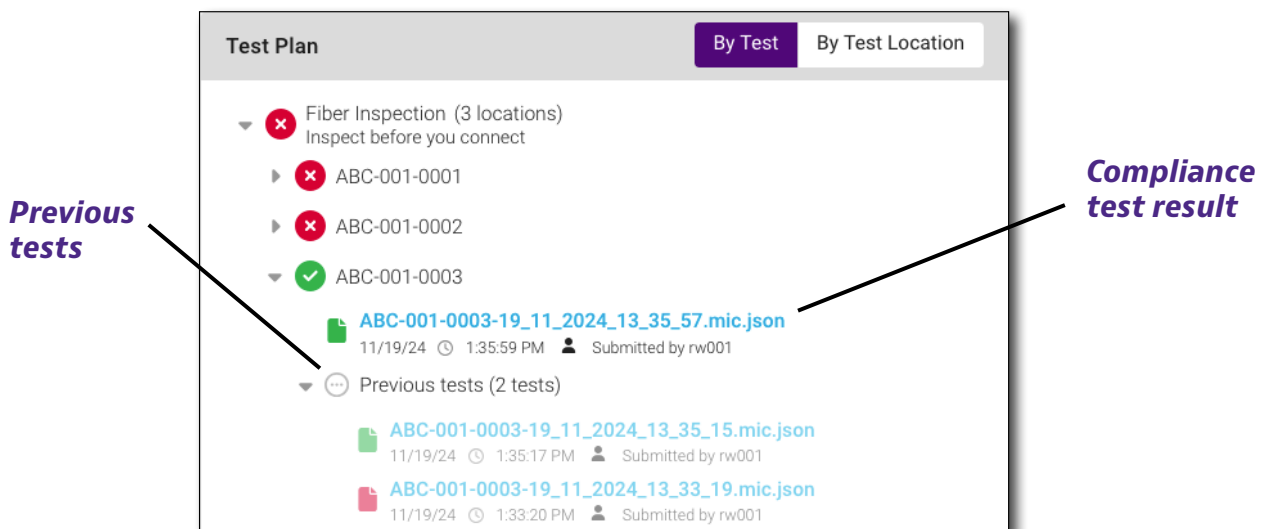
Job test results are displayed in the Test Plan section. You can expand to view the test status (pass/fail) and click on uploaded test result files to view them (JSReport view of the result file will open in a new tab).

If multiple tests run for a test location, then previous results will be grouped together. The test result used for compliance of the test step is in bold (all other result files are slightly transparent).

- You can see the full job and test plan details by clicking the **View full job** icon.
- To refresh the job information, select **Refresh**.



Job detail, including job state, tech assigned, template, test plans, etc.

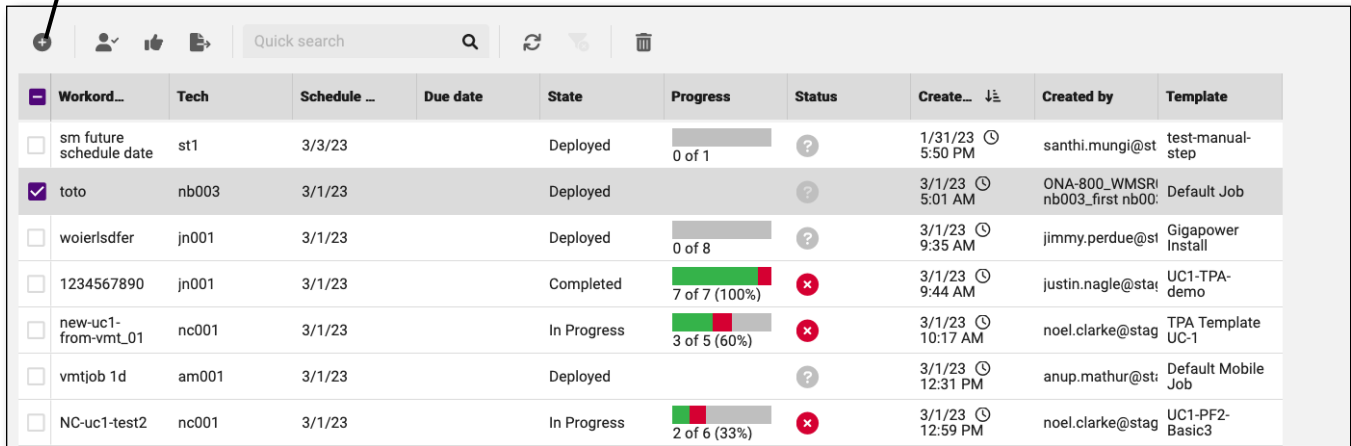


Multiple tests for a location, showing previous tests and compliance test step in bold

Creating a job

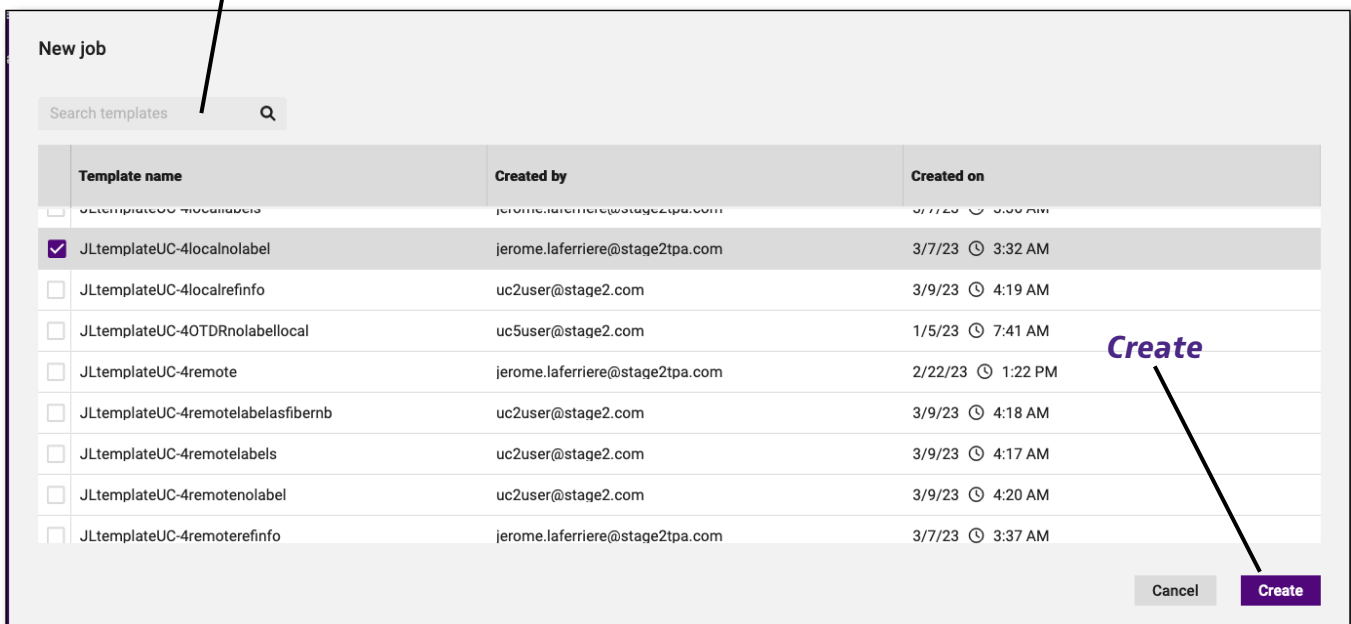
1. From the Job Manager, select **New Job**. The New Job screen appears.
2. Choose the template you want to use or use the search box to find it. Then select **Create**. The Job screen appears.

New Job



	Workord...	Tech	Schedule ...	Due date	State	Progress	Status	Create...	Created by	Template
<input type="checkbox"/>	sm future schedule date	st1	3/3/23		Deployed	0 of 1	?	1/31/23 5:50 PM	santhi.mungi@st	test-manual-step
<input checked="" type="checkbox"/>	toto	nb003	3/1/23		Deployed		?	3/1/23 5:01 AM	ONA-800_WMSRI nb003_first nb00	Default Job
<input type="checkbox"/>	woierlsdfer	jn001	3/1/23		Deployed	0 of 8	?	3/1/23 9:35 AM	jimmy.perdue@st	Gigapower Install
<input type="checkbox"/>	1234567890	jn001	3/1/23		Completed	7 of 7 (100%)	✖	3/1/23 9:44 AM	justin.nagle@sta	UC1-TPA-demo
<input type="checkbox"/>	new-uc1-from-vmt_01	nc001	3/1/23		In Progress	3 of 5 (60%)	✖	3/1/23 10:17 AM	noel.clarke@stag	TPA Template UC-1
<input type="checkbox"/>	vmtjob 1d	am001	3/1/23		Deployed		?	3/1/23 12:31 PM	anup.mathur@st	Default Mobile Job
<input type="checkbox"/>	NC-uc1-test2	nc001	3/1/23		In Progress	2 of 6 (33%)	✖	3/1/23 12:59 PM	noel.clarke@stag	UC1-PF2-Basic3

Search



New job

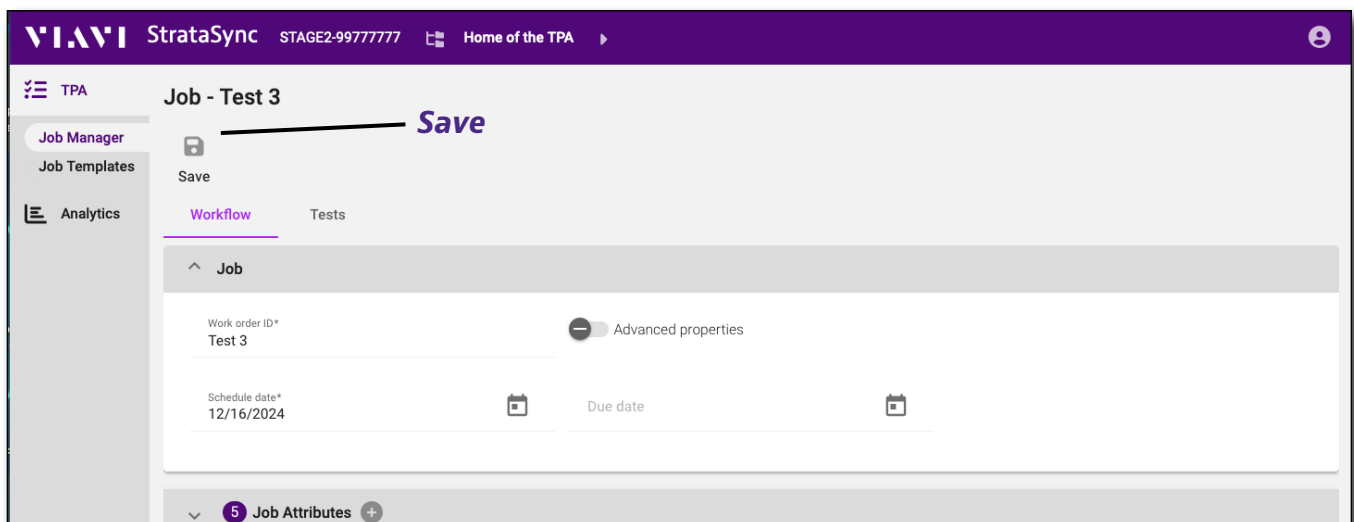
Search templates

	Template name	Created by	Created on
<input type="checkbox"/>	JLtemplateUC-4localnolabel	jerome.laferriere@stage2tpa.com	3/7/23 3:32 AM
<input checked="" type="checkbox"/>	JLtemplateUC-4localnolabel	jerome.laferriere@stage2tpa.com	3/7/23 3:32 AM
<input type="checkbox"/>	JLtemplateUC-4localrefinfo	uc2user@stage2.com	3/9/23 4:19 AM
<input type="checkbox"/>	JLtemplateUC-4OTDRnolabellocal	uc5user@stage2.com	1/5/23 7:41 AM
<input type="checkbox"/>	JLtemplateUC-4remote	jerome.laferriere@stage2tpa.com	2/22/23 1:22 PM
<input type="checkbox"/>	JLtemplateUC-4remotelabelasfibernb	uc2user@stage2.com	3/9/23 4:18 AM
<input type="checkbox"/>	JLtemplateUC-4remotelabels	uc2user@stage2.com	3/9/23 4:17 AM
<input type="checkbox"/>	JLtemplateUC-4remotenolabel	uc2user@stage2.com	3/9/23 4:20 AM
<input type="checkbox"/>	JLtemplateUC-4remoterefinfo	jerome.laferriere@stage2tpa.com	3/7/23 3:37 AM

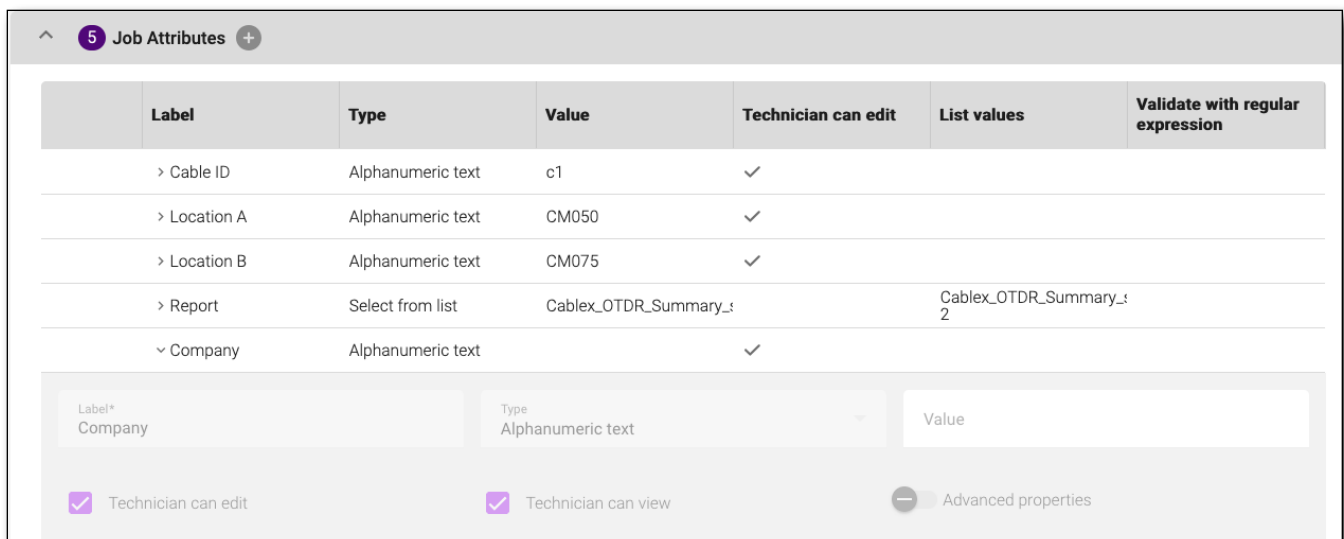
Cancel Create

New Job screen

3. Enter a unique **Job ID** and **schedule date** (both required). You can also enter a work order label, contractor ID, and due date.
4. Use the **Job Attributes** section to add additional detail, such as company name, tech name, job address, job comments, etc. The **Custom** option allows you to create your own attributes, as well.
 - To delete an attribute, hover over the row and select the **Delete** button.
 - To move an attribute, hover over the row and select the **Move** button to drag up or down.
5. When done, select **Save** at the top. The job will be added to the Jobs List.



Creating a job



Adding job attributes

Adding tests to a job

Job templates already include tests for the job, but you can add additional tests to the job, as well.

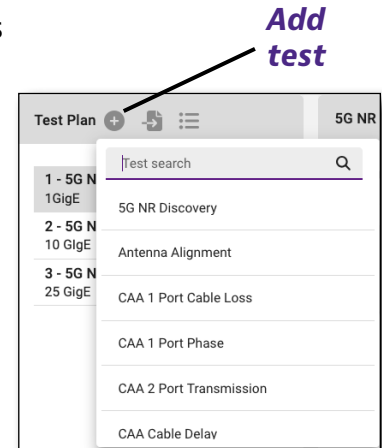
1. From the New Job screen, select the **Tests** tab. The Test Plan screen appears.

The current tests for the job are on the left, the middle shows details for the selected test step, and the right side shows a comprehensive list of all valid instruments that can be used for the job, where transparent instruments cannot be used for the selected test step.

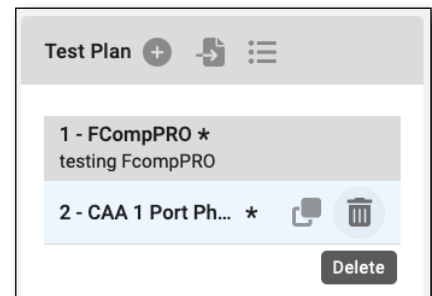
2. Select **Add test** to add additional tests, and select **Test required for compliance** for each test, as needed. You can also import test location labels for all test plans or auto-generate them (see the next section).

Use the pop-up to select from the list of supported tests, or search for a specific test.

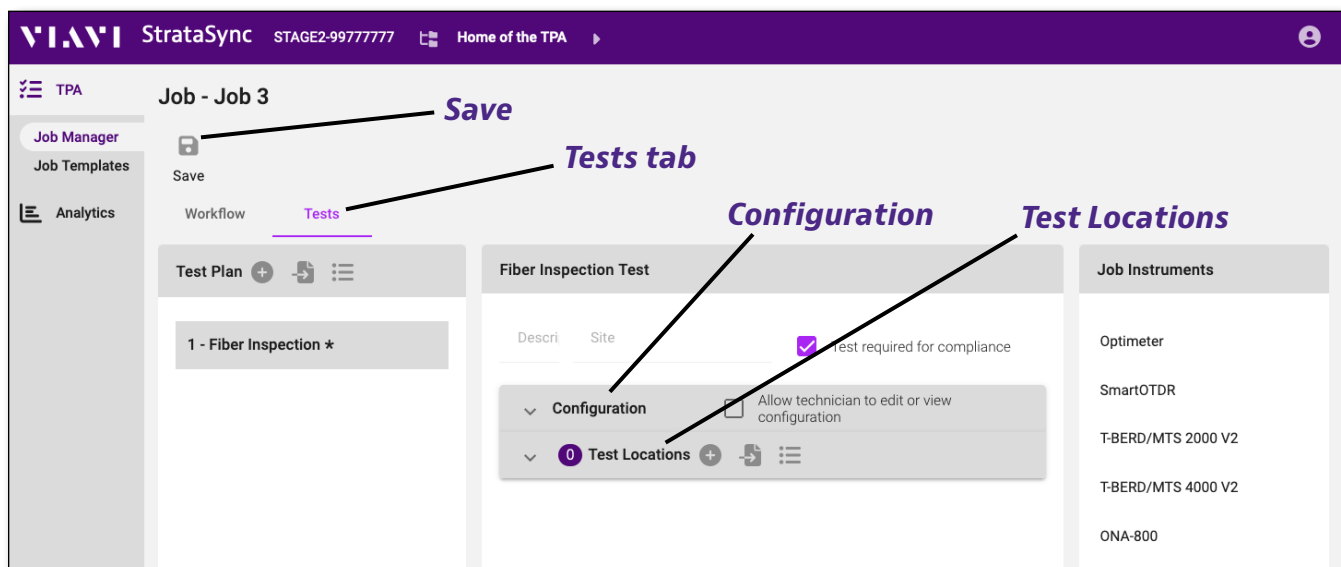
- To duplicate a test, hover over the row and select the **Duplicate** button.
- To delete a test, hover over the row and select the **Delete** button.
- To move a test, hover over the row and drag up or down.



Adding tests



Deleting tests



Adding tests

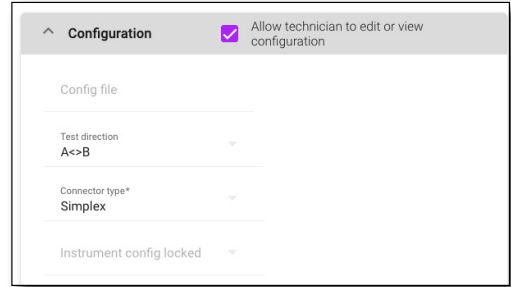
3. Select **Configuration** to add additional detail for each test (when required). This section could provide a lot of options, depending on the instrument.
4. Next to **Test Locations**, select **Add test location** to add additional locations, as needed.

Enter a unique label for each location.

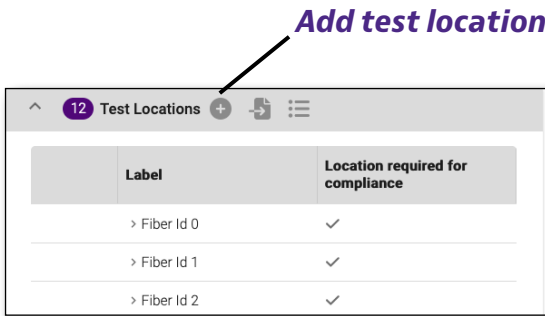
You can also import test location labels or auto-generate them (see the next section).

- To rename a test location, select the down arrow for that label, and enter the new name in the label box.
- To delete a test location, hover over the row and select the **Delete** button.
- To move a test location, hover over the row and select the **Move** button to drag up or down.

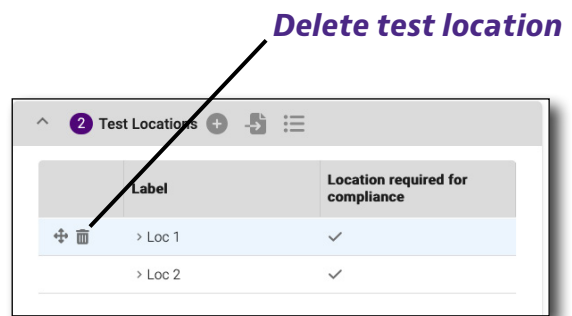
5. When done, select **Save** at the top. The job will be added to the Jobs List.



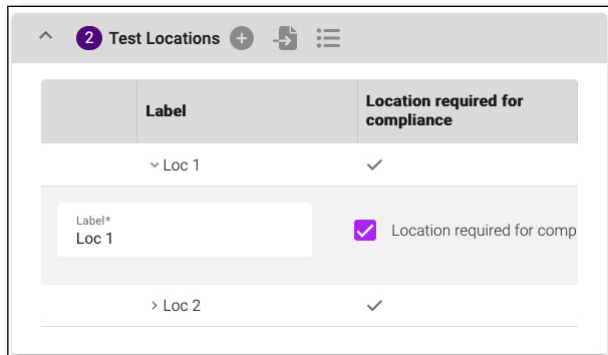
Adding test location configurations



Adding test locations



Deleting test locations



Naming test locations with labels

Adding labels to test locations

Adding test location labels allows you to customize location naming conventions, including building number, rack, fiber, etc.

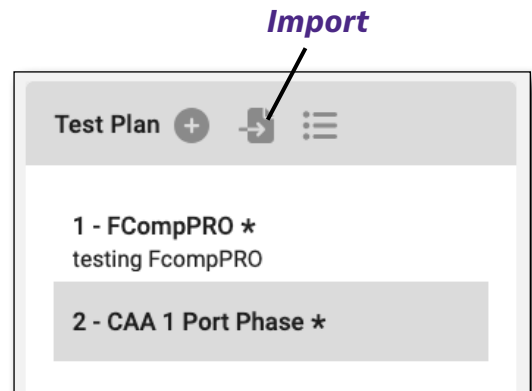
Importing labels

You can import test location labels to all your test plans or per test location (if test locations are different for each test step) from a CSV file. Contact us at VIAVI TAC for the template to use.

1. From the Test Plan screen, select **Import test location labels**. A screen appears to choose the CSV file you want to import. Once imported, the labels will be added to your job.

If you already have labels added, a pop-up appears asking if you want to add to the existing list or replace them.

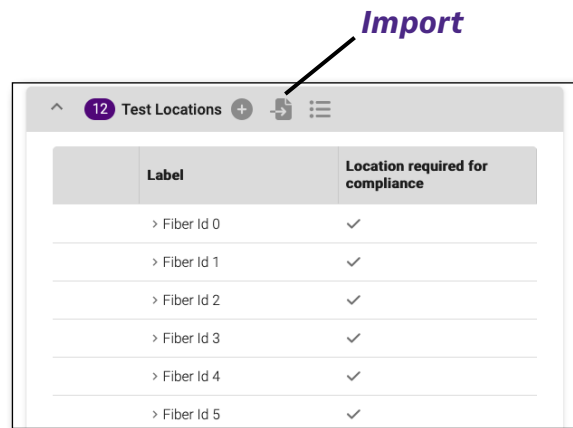
- For all test plans, choose **Import** in the Test Plan section.
- For individual test locations, choose **Import** in the Test Location section.



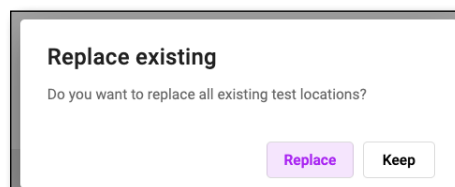
Import test location labels for all test plans

	A	B
1	Label	
2	Fiber Id 0	
3	Fiber Id 1	
4	Fiber Id 2	
5	Fiber Id 3	
6	Fiber Id 4	
7	Fiber Id 5	
8	Fiber Id 6	
9	Fiber Id 7	
10	Fiber Id 8	
11	Fiber Id 9	
12	Fiber Id 10	
13	Fiber Id 11	
14		

Sample CSV file – Importing test location labels



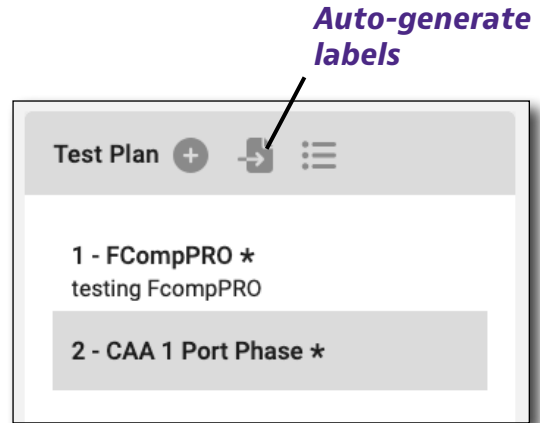
Import test location labels for test steps



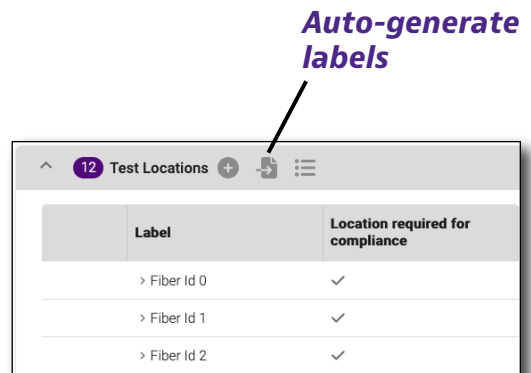
Auto-generating labels

You can also auto-generate test location labels for all your test plans or per test location (if test locations are different for each test step).

1. From the Test Plan screen, select **Auto-generate test location labels**. The Auto-generate test location labels screen appears.
2. From the **List type** dropdown, choose **Simple numbered** or **Sequential pattern**.
 - If you already have labels added, uncheck **Replace all existing test locations** to add to the existing list.
3. Enter the details and select **Generate** to create the labels.
 - For all test plans, choose **Auto-generate** in the Test Plan section.
 - For individual test locations, choose **Auto-generate** in the Test Location section.



Auto-generate test location labels for all test plans



Auto-generate test location labels for test steps

Replace existing test locations

Auto-generate test location labels

List type
Simple numbered

Prefix text: AA Start number*: 1 End number*: 10

Zero-pad numbers

All locations required for compliance

Replace all existing test locations

Generate

Simple numbered labels

Auto-generate test location labels

List type
Sequential pattern

Start label*
AA-01

End label*
AB-05

All locations required for compliance

Replace all existing test locations

Cancel Generate

Sequential pattern labels

10 Test Locations

Label	Location required for compliance
> AA-01	✓
> AA-02	✓
> AA-03	✓
> AA-04	✓
> AA-05	✓
> AB-01	✓
> AB-02	✓
> AB-03	✓
> AB-04	✓
> AB-05	✓

Sequential pattern labels, using AA-01 to AB-05

Importing jobs

You can bulk import jobs from a CSV file. Contact us at VIAVI TAC for the template to use.

The feature requires a SS-TPA-JOB-IMPORT-nYR subscription in addition to a SS-PRO-nYR (or a non-expired SS-ENT-WRKFLW-nYR) subscription.

Keep the following in mind when using the sample CSV file:

- The first row is the header and not to be modified.
- Rows 2-4 are examples. You can have multiple test locations for a job, as well as assign to multiple techs.
- Rows 6-8 have information on which fields are required/optional and entry criteria. **These rows need to be deleted before trying to import the file.**

From the Job Manager, select **Import**. A screen appears to choose the CSV file you want to import. Once imported, the jobs will be added to your Jobs List.

Import

The screenshot shows the VIAVI StrataSync Job Manager interface. The 'Import' button is highlighted with a blue arrow. The interface displays a table of jobs with the following columns: Work or..., Tech, Schedu..., Due date, State, Progress, Status, Created..., and Template. The table contains several rows of job data, including job IDs, tech names, due dates, states, progress percentages, and status icons.

Work or...	Tech	Schedu...	Due date	State	Progress	Status	Created...	Created...	Template
<input type="checkbox"/> pf-uc20-nc-1121	Team 2	11/21/24		In Progress	2 of 3 (67%)	✘	11/21/24	1(A) aman.patel@sta	UC20-plugfest-gold
<input type="checkbox"/> pf-UC20-Wed-001	Team 3	11/20/24		Completed	77.8% 9 of 9 (100%)	✘	11/20/24	2:PI noel.clarke@sta	UC20-plugfest-gold
<input checked="" type="checkbox"/> pf-uc14-ap-jp-e2e-test2		11/20/24		Completed	58.3% 41.7% 12 of 12 (100%)	✘	11/20/24	1(A) aman.patel@sta	UC14-metro10-gold
<input type="checkbox"/> pf-uc20-ona-nc2	rw001	11/19/24		Completed	77.8% 9 of 9 (100%)	✘	11/19/24	1:PI rodney.weaver@	UC20-plugfest-gold
<input type="checkbox"/> pf-uc14-metro10km-ap3	rw001	11/19/24		In Progress	72.7% 8 of 11 (73%)	✔	11/19/24	3:PI aman.patel@sta	UC14-metro10-gold
<input type="checkbox"/> pf-uc11-kh-1	kh002	11/18/24		Deployed	0 of 3	?	11/18/24	1(A) kevin.holmes2@	UC10-11-unidir-sm-gold

Jobs List

	A	B	C	D	E	F	G	H
1	workOrderid	techlds	date	dueDate	contractorId	cableId	company	jobAddress
2	WO001	7871188	2024-11-25T00:00:00-04:00	2024-12-26T00:00:00-04:00	123456	Cable01	VIAVI	Indianapolis
3		9876543						
4	WO002	7871188	2024-11-25T00:00:00-04:00	2024-12-26T00:00:00-04:00	123456	bigCable01	VIAVI Solutions	Indianapolis
5								
6	Required	Optional	Required	Optional	Optional	Optional	Optional	Optional
7	50 max chars	Valid tech id(s)	ISO date format	ISO date format	Alphanumeric Text	Alphanumeric Text	Alphanumeric Text	Alphanumeric Text
8	100 jobs max							
9								

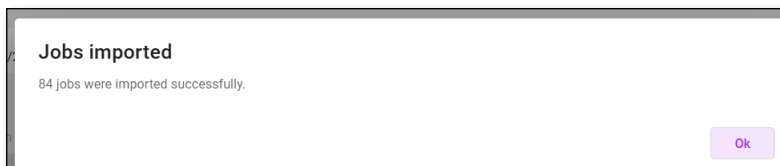
I	J	K	L	M
jobComment	testLocationA	testLocationB	typeName	testLocations
New Job Imported	locA001	locB001	OTDR 0611	Loc001
				Loc002
New Job Imported	locA001	locB001	OTDR 0611	Loc001
Optional	Optional	Optional	Required	Required
Alphanumeric Text	Alphanumeric Text	Alphanumeric Text	Valid TPA job template name	Limit 1000 locations per job

Sample CSV file – Importing jobs

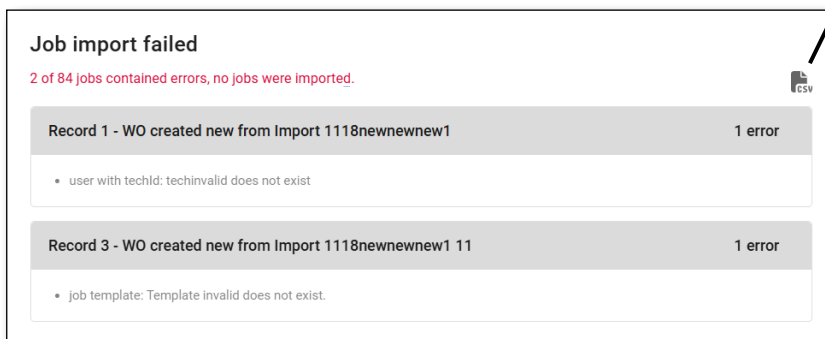
StrataSync validates the CSV file before importing jobs, and if there are any errors, no jobs are imported.

A pop-up message displays successful imports or a list of errors found in validation.

To download a list of the errors, select the **CSV** link.



Jobs imported successfully



Job import failed

Additional notes for job import

- 100 jobs max can be imported via a single CSV file.
- To minimize chance for timing out during import (after 5 mins), you should limit to 10,000 total max test locations for entire import session.

Example: If a CSV job import file has 1,000 test locations with a TPA job template typeName which includes 3 test steps, then this is 3,000 total test locations imported for this job.

Duplicating a job

Duplicating a job allows you to modify an existing job to save as a new one. A new work order ID must be used for the duplicated job.

1. From the Job Manager, select the job you want to duplicate or use the search box to find it. The select **Duplicate**. The Job screen appears, as a copy of the original job.

Duplicate *Search*

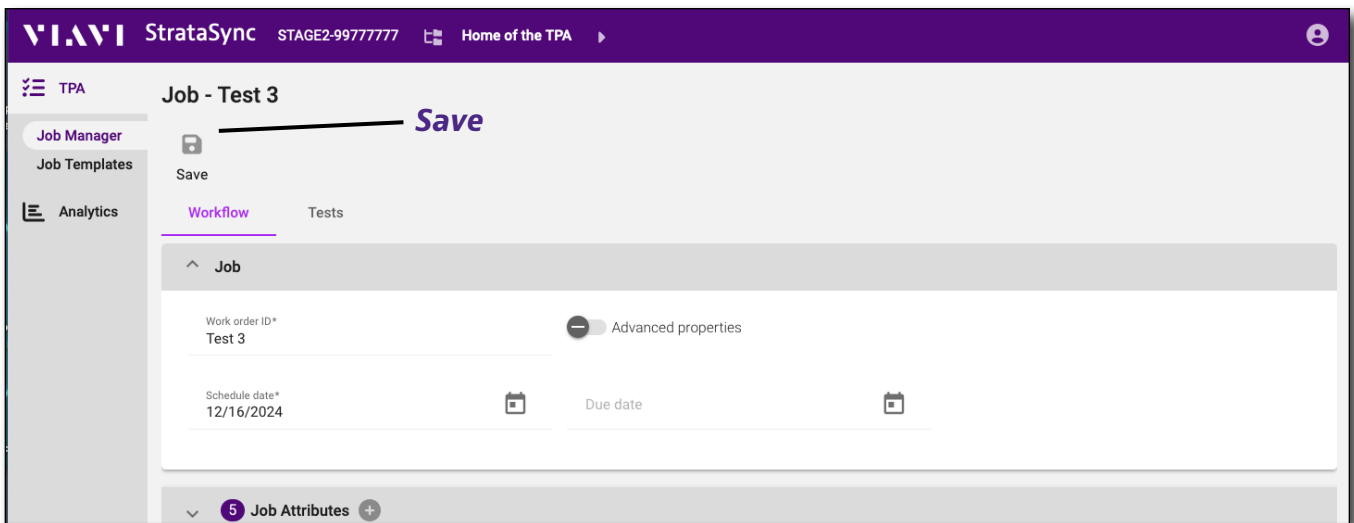
Job Manager 1670 active jobs 25 errored 151 approved jobs [Show more](#)

Date range: This year 1/1/24 - 12/31/24

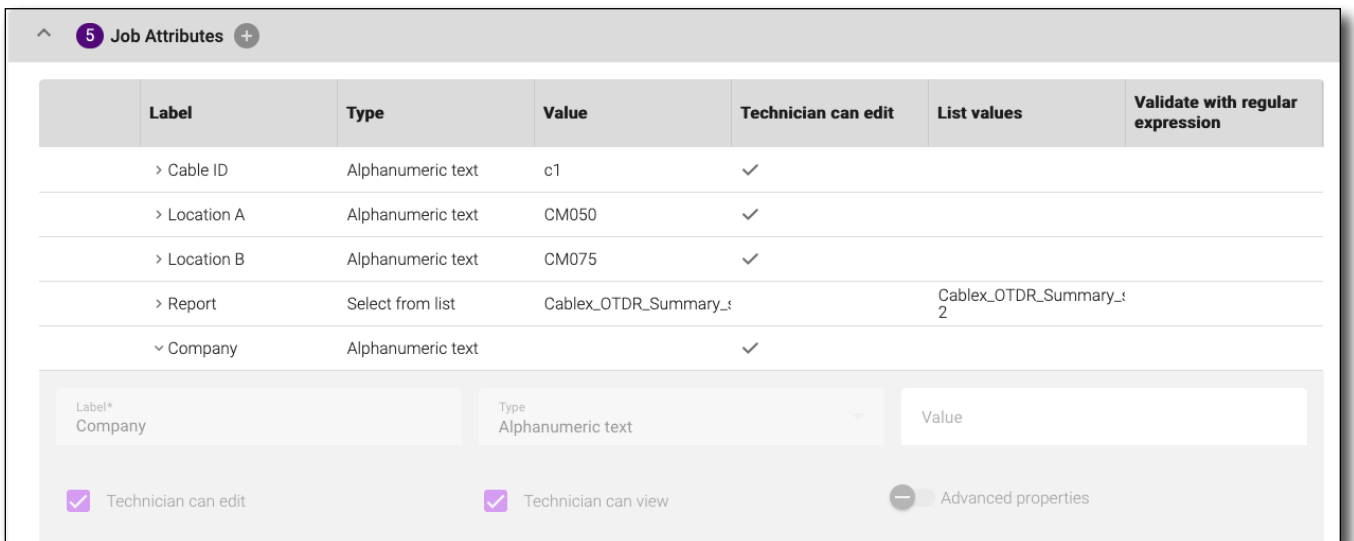
	Work or...	Tech	Schedu...	Due date	State	Progress	Status	Created...	Created...	Template
<input type="checkbox"/>	pf-uc20-nc-1121	Team 2	11/21/24		In Progress	2 of 3 (67%)	✘	11/21/24	1: aman.patel@sta	UC20-plugfest-gold
<input type="checkbox"/>	pf-UC20-Wed-001	Team 3	11/20/24		Completed	77.8% 9 of 9 (100%)	✘	11/20/24	2: noel.clarke@sta	UC20-plugfest-gold
<input checked="" type="checkbox"/>	pf-uc14-ap-jp-e2e-test2		11/20/24		Completed	58.3% 41.7% 12 of 12 (100%)	✘	11/20/24	1: aman.patel@sta	UC14-metro10-gold
<input type="checkbox"/>	pf-uc20-ona-nc2	rw001	11/19/24		Completed	77.8% 9 of 9 (100%)	✘	11/19/24	1: rodney.weaver@	UC20-plugfest-gold
<input type="checkbox"/>	pf-uc14-metro10km-ap3	rw001	11/19/24		In Progress	72.7% 8 of 11 (73%)	✔	11/19/24	3: aman.patel@sta	UC14-metro10-gold
<input type="checkbox"/>	pf-uc11-kh-1	kh002	11/18/24		Deployed	0 of 3	?	11/18/24	1: kevin.holmes2@	UC10-11-unidir-sm-gold

Jobs List

2. Enter a unique **Work Order ID** and **schedule date** (both required). You can also enter a due date, work order label, and contractor ID.
3. Use the **Tests** tab to update any Test Plan information.
4. Use the **Job Attributes** section to add additional detail, such as company name, tech name, job address, locations, job comments, etc. The **Custom** option allows you to create your own attributes, as well.
 - To delete an attribute, hover over the row and select the **Delete** button.
 - To move an attribute, hover over the row and select the **Move** button to drag up or down.
5. When done, select **Save** at the top. The template will be added to the Jobs List.



Duplicating a job

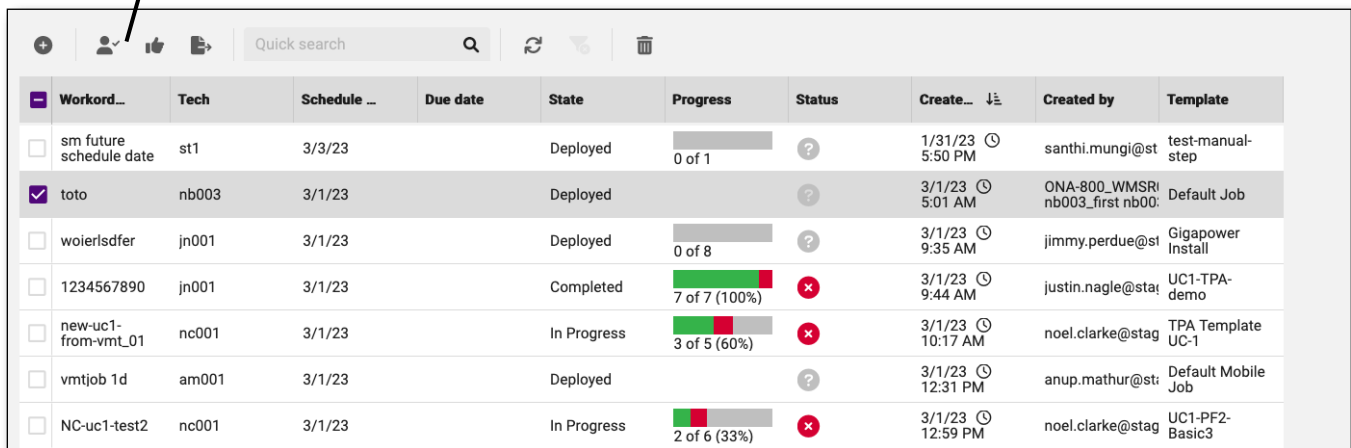


Adding job attributes

Assigning a job

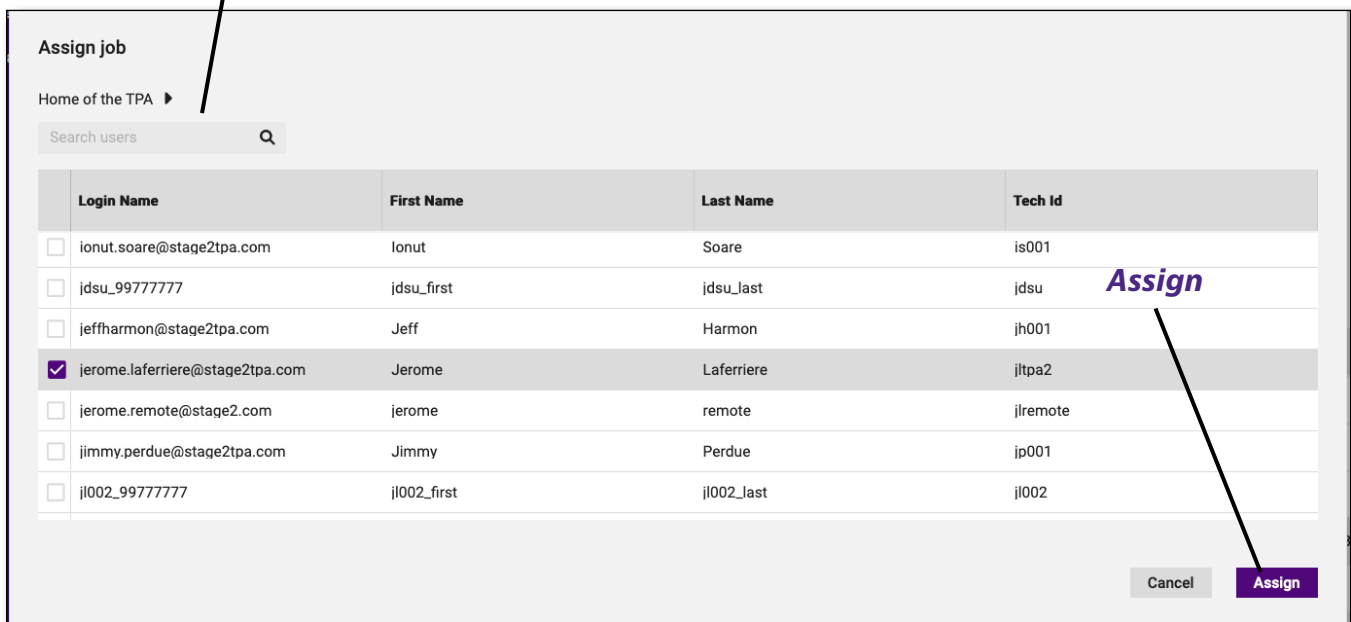
- From the Job Manager, select the job(s) you want to assign, then select **Assign**. The Assign Job screen appears.
- Choose the tech(s) you want or use the search box, then select **Assign**. The job is assigned to the tech(s).
 - When assigning multiple techs, a **Team** will show in the jobs list, along with the number of techs. Click the number to show a pop-up of the team list.

Assign



	Workord...	Tech	Schedule ...	Due date	State	Progress	Status	Create...	Created by	Template
<input type="checkbox"/>	sm future schedule date	st1	3/3/23		Deployed	0 of 1	?	1/31/23 5:50 PM	santhi.mungi@st	test-manual-step
<input checked="" type="checkbox"/>	toto	nb003	3/1/23		Deployed		?	3/1/23 5:01 AM	ONA-800_WMSRI nb003_first nb00	Default Job
<input type="checkbox"/>	woierlsdfer	jn001	3/1/23		Deployed	0 of 8	?	3/1/23 9:35 AM	jimmy.perdue@st	Gigapower Install
<input type="checkbox"/>	1234567890	jn001	3/1/23		Completed	7 of 7 (100%)	✘	3/1/23 9:44 AM	justin.nagle@sta	UC1-TPA-demo
<input type="checkbox"/>	new-uc1-from-vmL_01	nc001	3/1/23		In Progress	3 of 5 (60%)	✘	3/1/23 10:17 AM	noel.clarke@stag	TPA Template UC-1
<input type="checkbox"/>	vmtjob 1d	am001	3/1/23		Deployed		?	3/1/23 12:31 PM	anup.mathur@st	Default Mobile Job
<input type="checkbox"/>	NC-uc1-test2	nc001	3/1/23		In Progress	2 of 6 (33%)	✘	3/1/23 12:59 PM	noel.clarke@stag	UC1-PF2-Basic3

Search



Assign job

Home of the TPA ▶

Search users

	Login Name	First Name	Last Name	Tech Id
<input type="checkbox"/>	ionut.soare@stage2tpa.com	Ionut	Soare	is001
<input type="checkbox"/>	jdsu_99777777	jdsu_first	jdsu_last	jdsu
<input type="checkbox"/>	jeffharmon@stage2tpa.com	Jeff	Harmon	jh001
<input checked="" type="checkbox"/>	jerome.laferriere@stage2tpa.com	Jerome	Laferriere	jltpa2
<input type="checkbox"/>	jerome.remote@stage2.com	jerome	remote	jlremote
<input type="checkbox"/>	jimmy.perdue@stage2tpa.com	Jimmy	Perdue	jp001
<input type="checkbox"/>	jl002_99777777	jl002_first	jl002_last	jl002

Cancel Assign

Assign job screen

Assign job

Licenses for TPA option

Search users

<input type="checkbox"/>	Login Name	First Name	Last Name	Tech Id
<input type="checkbox"/>	deletejob@99111111.com	santhi	deletejob	deletejob1
<input checked="" type="checkbox"/>	editjob@99111111.com	santhi	editjob	editjob1
<input type="checkbox"/>	noasset@99111111.com	user	no assets	noasset1
<input type="checkbox"/>	santhi@99111111.com	Santhi	NewTestAcct for license validation	sm1
<input checked="" type="checkbox"/>	sjtdeploy@21069.com	Santhi	jobtemp deploy permission	sjtdep1
<input type="checkbox"/>	edit@21069.com	Santhi	jobtemp Edit permission	edit1

2 users selected. X

Cancel Assign

Assigning team jobs

Team job (with number of techs)

<input type="checkbox"/>	Worker...	Tech	Schedul...	Due date	State	Progress	Status
<input type="checkbox"/>	sm inst stg2 otdr 0116 2	st2	1/16/24		Completed	100% 2 of 2 (100%)	✓
<input checked="" type="checkbox"/>	sm inst stage2 otdr 0116	Team 2	1/16/24		Completed	100% 2 of 2 (100%)	✓
<input type="checkbox"/>	sm job 0116 4	Team 6	1/16/24		Completed	100% 2 of 2 (100%)	✓

<input type="checkbox"/>	test2222	Team 12	1/25/24
<input type="checkbox"/>	Test 2-1-1	Team 3	1/25/24
<input type="checkbox"/>	sdfsdfsdfsf	st	/25/24
<input type="checkbox"/>	testwww	sub1	/25/24
<input type="checkbox"/>	job2	viewjob1	1/25/24

Team list pop-up

Approving a job

From the Job Manager, select the job(s) you want to approve, then select **Approve**. You will be asked to confirm. Select **Approve** again.

Once a job is approved, after a sync, the job disappears from the Job Manager in the tech's Mobile Tech application and associated instrument(s).

Jobs can be set to auto approve after a set number of days. See "[Auto approve job settings](#)" on [page 227 \(per-org settings\)](#) or [page 294 \(system-wide\)](#).

To see what jobs have been approved, select **Approved** from the state column filter in the Jobs List. See "[Jobs List](#)" on [page 71](#) for details.

To approve a job, you need to have the appropriate permissions. See "[Managing user roles](#)" on [page 203](#) for details.

Exporting a job

From the Job Manager, select the job(s) you want to export, then select **Export**. The JSON file(s) will download to your desktop.

For some VIAVI instruments, you can bring exported files into an instrument directory, and they will then import to the job manager.

Deleting a job

From the Job Manager, select the job(s) you want to delete, then select **Delete**. You will be asked to confirm. Select **Delete** again.

The job(s) will be removed from the Job List. Once a job is deleted, after a sync, the job disappears from the Job Manager in the tech's Mobile Tech application and associated instrument(s).

	Workord...	Tech	Schedule ...	Due date	State	Progress	Status	Create... ↓	Created by	Template
<input type="checkbox"/>	sm future schedule date	st1	3/3/23		Deployed	0 of 1	?	1/31/23 5:50 PM	santhi.mungi@st	test-manual-step
<input checked="" type="checkbox"/>	toto	nb003	3/1/23		Deployed		?	3/1/23 5:01 AM	ONA-800_WMSRI-nb003_first nb00	Default Job
<input type="checkbox"/>	woierlsdfer	jn001	3/1/23		Deployed	0 of 8	?	3/1/23 9:35 AM	jimmy.perdue@st	Gigapower Install
<input type="checkbox"/>	1234567890	jn001	3/1/23		Completed	7 of 7 (100%)	✖	3/1/23 9:44 AM	justin.nagle@sta	UC1-TPA-demo
<input type="checkbox"/>	new-uc1-from-vm1_01	nc001	3/1/23		In Progress	3 of 5 (60%)	✖	3/1/23 10:17 AM	noel.clarke@stag	TPA Template UC-1
<input type="checkbox"/>	vm1job 1d	am001	3/1/23		Deployed		?	3/1/23 12:31 PM	anup.mathur@st	Default Mobile Job
<input type="checkbox"/>	NC-uc1-test2	nc001	3/1/23		In Progress	2 of 6 (33%)	✖	3/1/23 12:59 PM	noel.clarke@stag	UC1-PF2-Basic3

Job Templates List

The Job Templates List provides detail on the current templates, based on the filters used in the Job Templates dashboard.

From the Job Manager Main menu, select **Job Templates**.

Here you can also create new templates, duplicate templates, create jobs from templates, move to another organization, export to JSON, and delete templates. See the following sections for detail on these features.

Use the column sort and filter dropdowns and search box to filter the data further. To clear all column filters, select **Clear filters**.

To refresh the Templates List, select **Refresh**.

The screenshot shows the 'Job Templates' dashboard in the VIAVI StrataSync interface. The top navigation bar includes 'VIAVI StrataSync', 'STAGE2-99777777', and 'Home of the TPA'. The main header is 'Job Templates'. Below the header, there are action buttons: 'New', 'Duplicate', 'New job', 'Move', and 'Export'. A 'Quick search' box is present, along with 'Refresh', 'Clear filters', and 'Delete' buttons. A table lists the templates with columns for 'Template name', 'Organization', 'Created by', 'Created on', 'Modified by', and 'Modified on'. The table contains several rows of data, with '5GNRDiscovery All Rates' selected. Callouts point to the 'Job Templates' header, the 'Quick search' box, the 'Refresh' button, the 'Clear filters' button, and the 'Filter' dropdown in the table header.

Templates List

The diagram illustrates two UI components. On the left, a 'Template name' column header is shown with a sort icon (downward arrow) and a filter icon (funnel). On the right, a dropdown menu is shown with the title 'Template name'. The menu has a 'Compare' dropdown set to 'Starts with' and a 'Value' input field containing 'Abc'. An 'OK' button is located at the bottom right of the dropdown.

Column sort filters and dropdowns

Creating a job template

A job template is a specific file which contains all the relevant information from the customer method and procedure for the tests to be performed by the technician.

The manager or technician can use this template to create a real job, for example, by just adding the job ID with associated label list. This job template can also be used by the workflow API to create jobs.

Before deploying a job template, we recommend you have a testing account in an isolated sub-org where a user can create and test templates. After these templates are complete and satisfactory, the template can be moved by an admin to the appropriate organization for deployment.

1. From the Job Manager, select the **Job Templates** tab. The Templates List screen appears.
2. Select **New**. The New Template screen appears.

Job Templates **New**

Template name	Organization	Created by	Created on	Modified by	Modified on
<input type="checkbox"/> 2024-02-22 DP Optical Power	Legacy Templates	dominik.prause@stage2...	2/22/24 5:20 AM	mantu.nigam.root@stag...	9/27/24 1:53 AM
<input type="checkbox"/> 5GNRDiscovery	Legacy Templates	andrew.sedlovsky@stag...	3/24/23 6:22 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input checked="" type="checkbox"/> 5GNRDiscovery All Rates	Legacy Templates	andrew.sedlovsky@stag...	3/21/23 9:09 AM	andrew.sedlovsky@stag...	4/29/24 5:21 PM
<input type="checkbox"/> 5GNRLocations	Legacy Templates	andrew.sedlovsky@stag...	4/6/23 1:38 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input type="checkbox"/> 5GnrWithPicAndSig	Legacy Templates	roger.rhodes@stage2tp...	4/13/23 1:41 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input type="checkbox"/> abc	Virgin Media	arsalan.raghib@stage2t...	5/16/24 7:03 AM		
<input type="checkbox"/> aby_tests_1sw-4808	STE Fiber Test	noel.clarke@stage2tps...	7/2/24 5:07 AM		

Templates List



NOTE:

TPA features require the appropriate roles/permissions in StrataSync (e.g. Job Management and Job Templates).

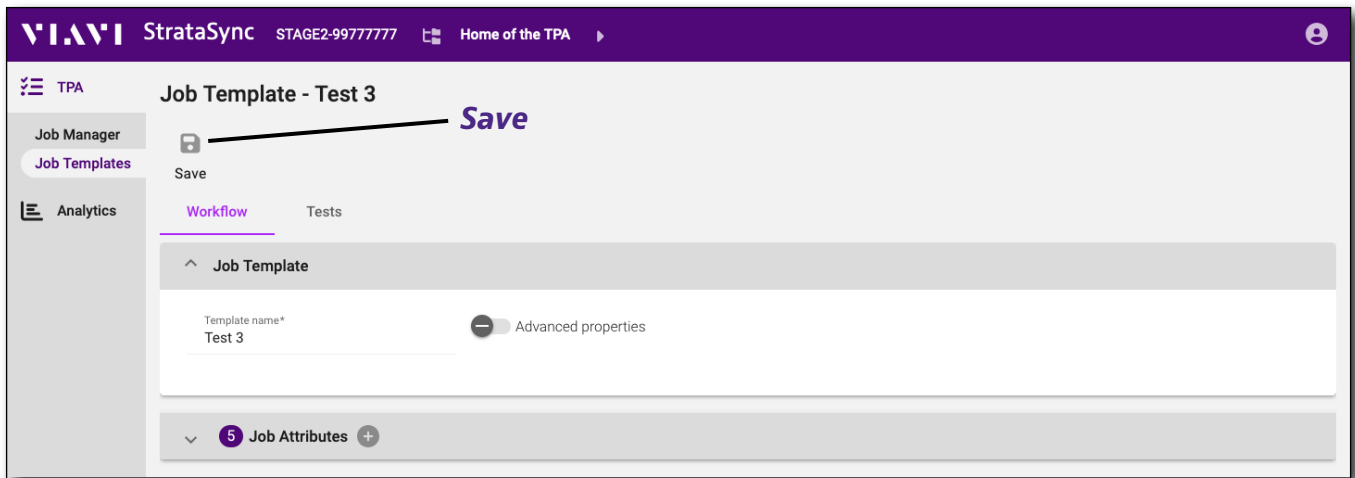
See "Managing user roles" on page 203 for details.

3. Enter a unique **Template name** (required). You can also enter a work order label and contractor ID.
4. Use the **Job Attributes** section to add additional detail, such as company name, tech name, job address, locations, job comments, etc. The **Custom** option allows you to create your own attributes, as well.

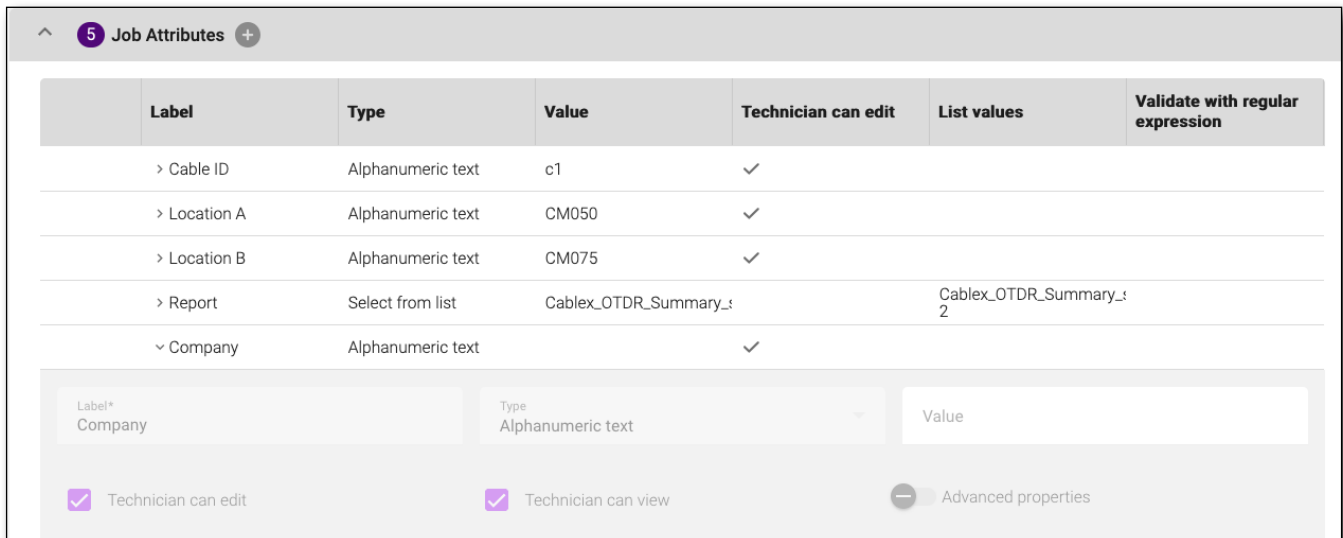
The pre-defined attributes can eventually be used by the test type itself and populate the corresponding fields of the test type (e.g. location A and location B for the OTDR test type will be seen in the OTDR PDF report generated by the OTDR instrument).

- To delete an attribute, hover over the row and select the **Delete** button.
- To move an attribute, hover over the row and select the **Move** button to drag up or down.

5. When done, select **Save** at the top. The template will be added to the Templates List.



Creating a template



Adding job attributes

Adding tests to a job template

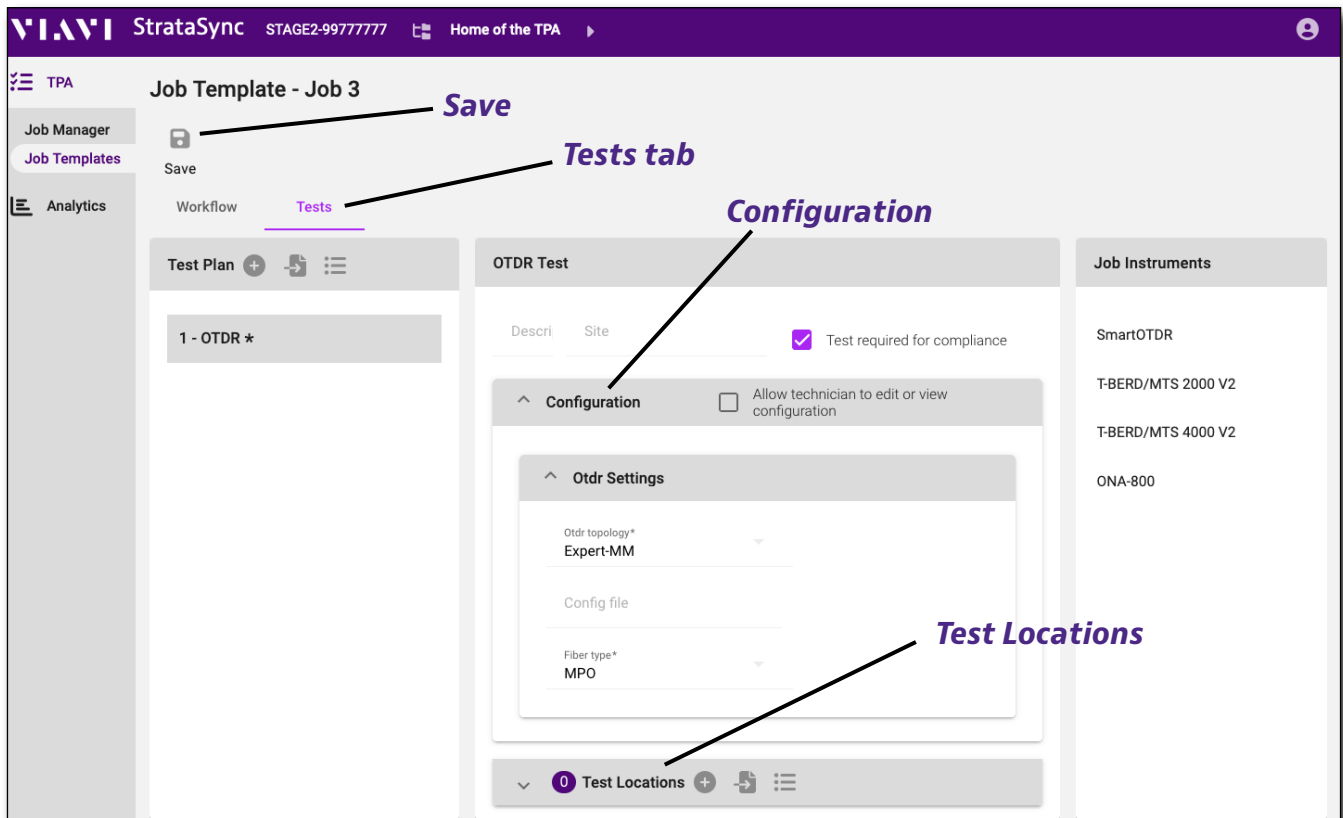
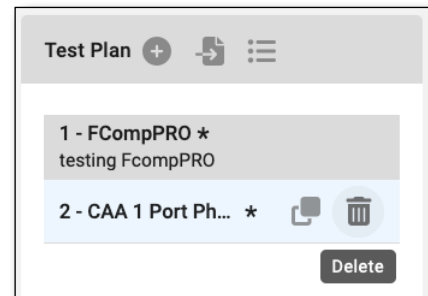
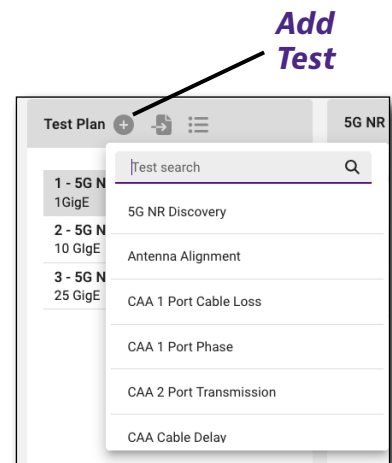
1. From the New Template screen, select the **Tests** tab. The Test Plan screen appears.

The current tests for the job are on the left, the middle shows details for the selected test step, and the right side shows a comprehensive list of all valid instruments that can be used for the job, where transparent instruments cannot be used for the selected test step.

2. Select **Add test** to add additional tests, and select **Test required for compliance** for each test, as needed. You can also import test location labels for all test plans or auto-generate them (see the next section).

Use the pop-up to select from the list of supported tests, or search for a specific test.

- To duplicate a test, hover over the row and select the **Duplicate** button.
- To delete a test, hover over the row and select the **Delete** button.
- To move a test, hover over the row and drag up or down.



Adding tests

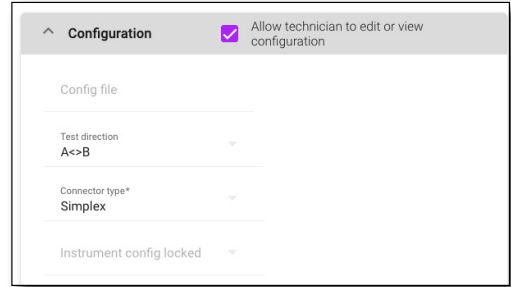
3. Select **Configuration** to add additional detail for each test (when required). This section could provide a lot of options, depending on the instrument.
4. Next to **Test Locations**, select **Add test location** to add additional locations, as needed.

Enter a unique label for each location.

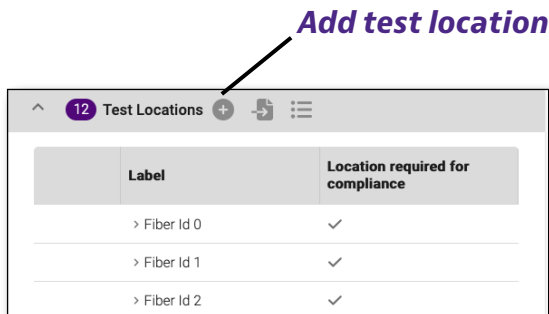
You can also import test location labels or auto-generate them (see the next section).

- To rename a test location, select the down arrow for that label, and enter the new name in the label box.
- To delete a test location, hover over the row and select the **Delete** button.
- To move a test location, hover over the row and select the **Move** button to drag up or down.

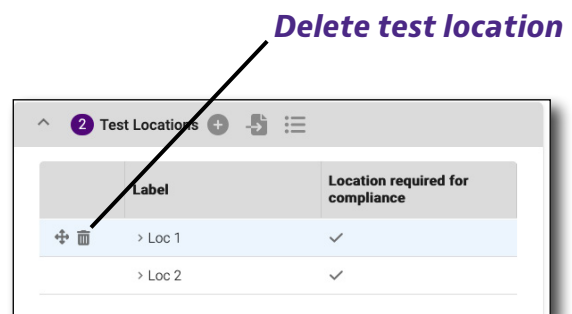
5. When done, select **Save** at the top. The template will be added to the Templates List.



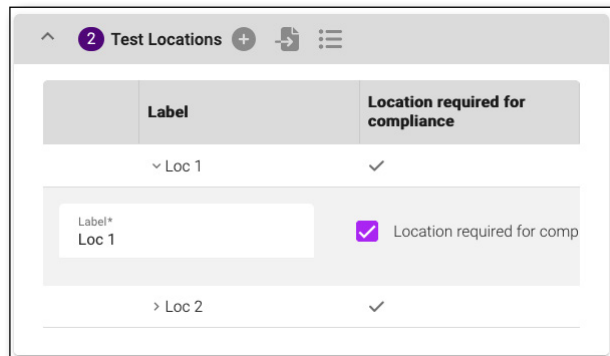
Adding test location configurations



Adding test locations



Deleting test locations



Naming test locations with labels

Adding labels to test locations

Adding test location labels allows you to customize location naming conventions, including building number, rack, fiber, etc.

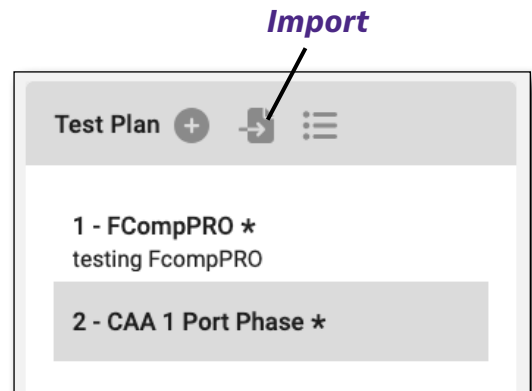
Importing labels

You can import test location labels to all your test plans or per test location (if test locations are different for each test step) from a CSV file. Contact us at VIAVI TAC for the template to use.

- From the Test Plan screen, select **Import test location labels**. A screen appears to choose the CSV file you want to import. Once imported, the labels will be added to your job.

If you already have labels added, a pop-up appears asking if you want to add to the existing list or replace them.

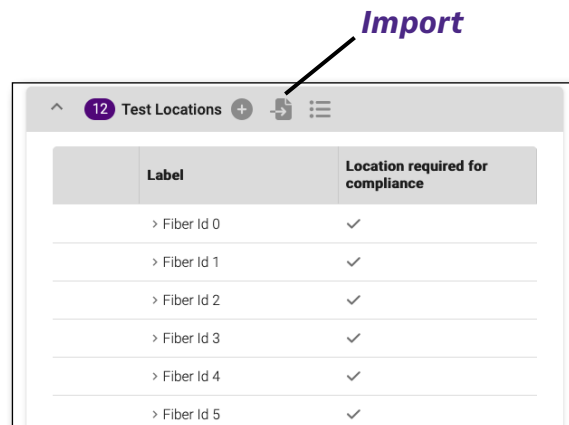
- For all test plans, choose **Import** in the Test Plan section.
- For individual test locations, choose **Import** in the Test Location section.



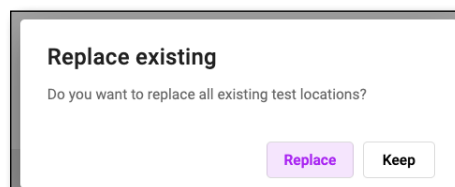
Import test location labels for all test plans

	A	B
1	Label	
2	Fiber Id 0	
3	Fiber Id 1	
4	Fiber Id 2	
5	Fiber Id 3	
6	Fiber Id 4	
7	Fiber Id 5	
8	Fiber Id 6	
9	Fiber Id 7	
10	Fiber Id 8	
11	Fiber Id 9	
12	Fiber Id 10	
13	Fiber Id 11	
14		

Sample CSV file – Importing test location labels



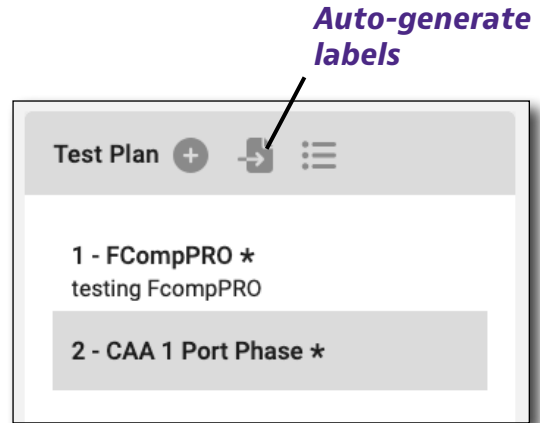
Import test location labels for test steps



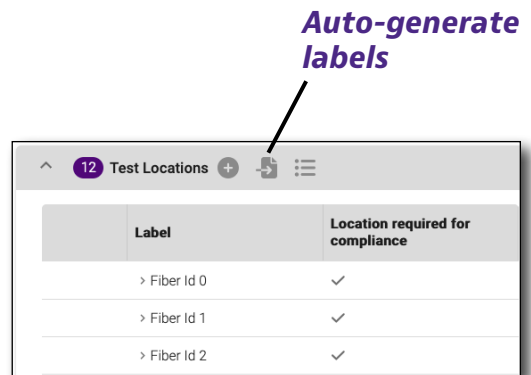
Auto-generating labels

You can also auto-generate test location labels for all your test plans or per test location (if test locations are different for each test step).

1. From the Test Plan screen, select **Auto-generate test location labels**. The Auto-generate test location labels screen appears.
2. From the **List type** dropdown, choose **Simple numbered** or **Sequential pattern**.
 - If you already have labels added, uncheck **Replace all existing test locations** to add to the existing list.
3. Enter the details and select **Generate** to create the labels.
 - For all test plans, choose **Auto-generate** in the Test Plan section.
 - For individual test locations, choose **Auto-generate** in the Test Location section.



Auto-generate test location labels for all test plans



Auto-generate test location labels for test steps

Replace existing test locations

Auto-generate test location labels

List type
Simple numbered

Prefix text: AA Start number*: 1 End number*: 10

Zero-pad numbers

All locations required for compliance

Replace all existing test locations

Generate

Simple numbered labels

Auto-generate test location labels

List type
Sequential pattern

Start label*
AA-01

End label*
AB-05

All locations required for compliance

Replace all existing test locations

Cancel Generate

Sequential pattern labels

10 Test Locations

Label	Location required for compliance
> AA-01	✓
> AA-02	✓
> AA-03	✓
> AA-04	✓
> AA-05	✓
> AB-01	✓
> AB-02	✓
> AB-03	✓
> AB-04	✓
> AB-05	✓

Sequential pattern labels, using AA-01 to AB-05

Duplicating a job template

Duplicating a template allows you to modify an existing template to save as a new one.

1. From the Job Manager, select the **Job Templates** tab. The Templates List screen appears.
2. Select the template you want to duplicate or use the search box to find it, then select **Duplicate**. The New Template screen appears, as a copy of the original template.

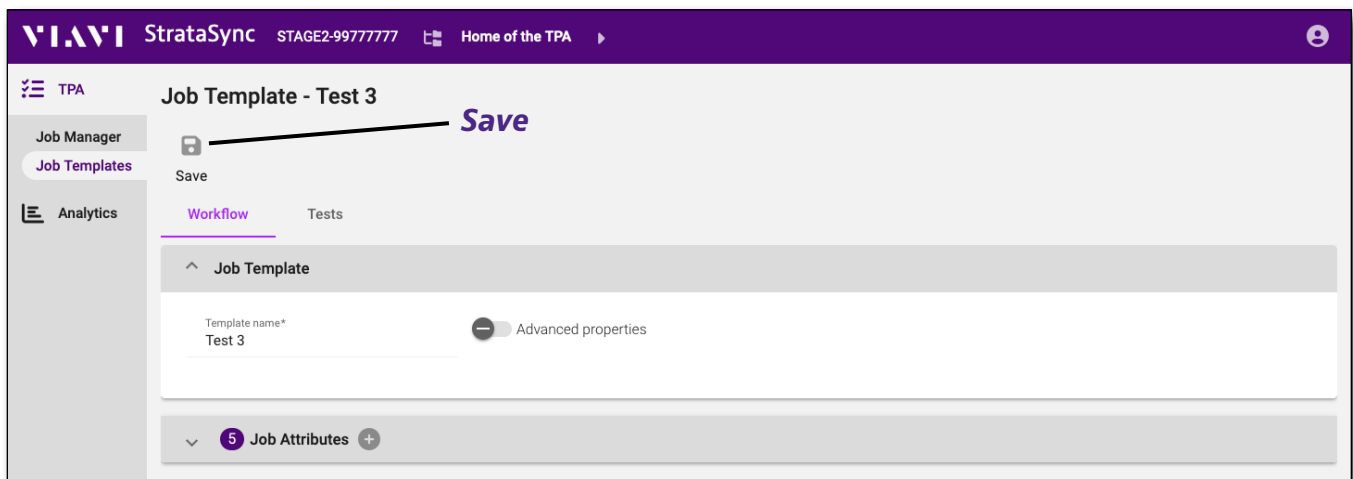
Job Templates *Duplicate* *Search*

The screenshot displays the StrataSync Job Templates interface. The top navigation bar includes the StrataSync logo and user information. The main content area shows a list of templates. The '5GNRDiscovery All Rates' template is selected, indicated by a checkmark in the first column. The interface includes a search bar and several action buttons like 'New', 'Duplicate', 'New job', 'Move', 'Export', 'Refresh', 'Clear filters', and 'Delete'.

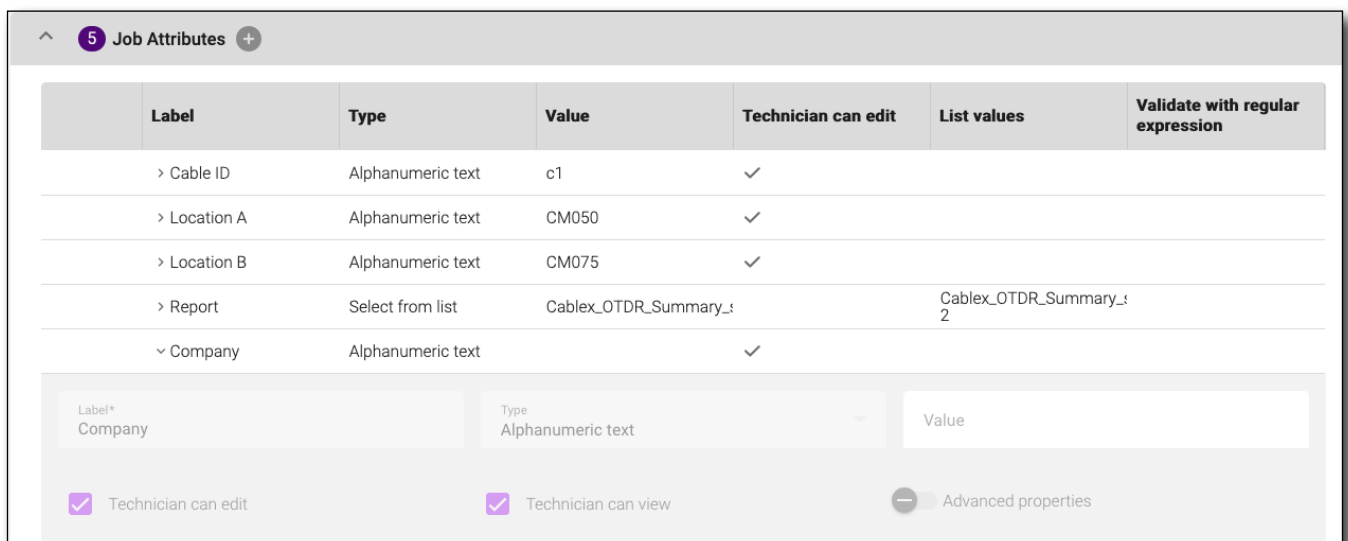
Template name	Organization	Created by	Created on	Modified by	Modified on
<input type="checkbox"/> 2024-02-22 DP Optical Power	Legacy Templates	dominik.prause@stage2...	2/22/24 5:20 AM	mantu.nigam.root@stag...	9/27/24 1:53 AM
<input type="checkbox"/> 5GNRDiscovery	Legacy Templates	andrew.sedlovsky@stag...	3/24/23 6:22 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input checked="" type="checkbox"/> 5GNRDiscovery All Rates	Legacy Templates	andrew.sedlovsky@stag...	3/21/23 9:09 AM	andrew.sedlovsky@stag...	4/29/24 5:21 PM
<input type="checkbox"/> 5GNRLocations	Legacy Templates	andrew.sedlovsky@stag...	4/6/23 1:38 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input type="checkbox"/> 5GnrWithPicAndSig	Legacy Templates	roger.rhodes@stage2tp...	4/13/23 1:41 PM	rodney.weaver@stage2t...	12/21/23 2:32 PM
<input type="checkbox"/> abc	Virgin Media	arsalan.raghib@stage2t...	5/16/24 7:03 AM		
<input type="checkbox"/> aby_tests_1sw-4808	StE Fiber Test	noel.clarke@stage2tps...	7/2/24 5:07 AM		

Templates List

3. Enter a unique **Template name** (required). You can also enter a work order label and contractor ID.
4. Use the **Job Attributes** section to add additional detail, such as company name, tech name, job address, locations, job comments, etc. The **Custom** option allows you to create your own attributes, as well.
 - To delete an attribute, hover over the row and select the **Delete** button.
 - To move an attribute, hover over the row and select the **Move** button to drag up or down.
5. When done, select **Save** at the top. The template will be added to the Templates List.



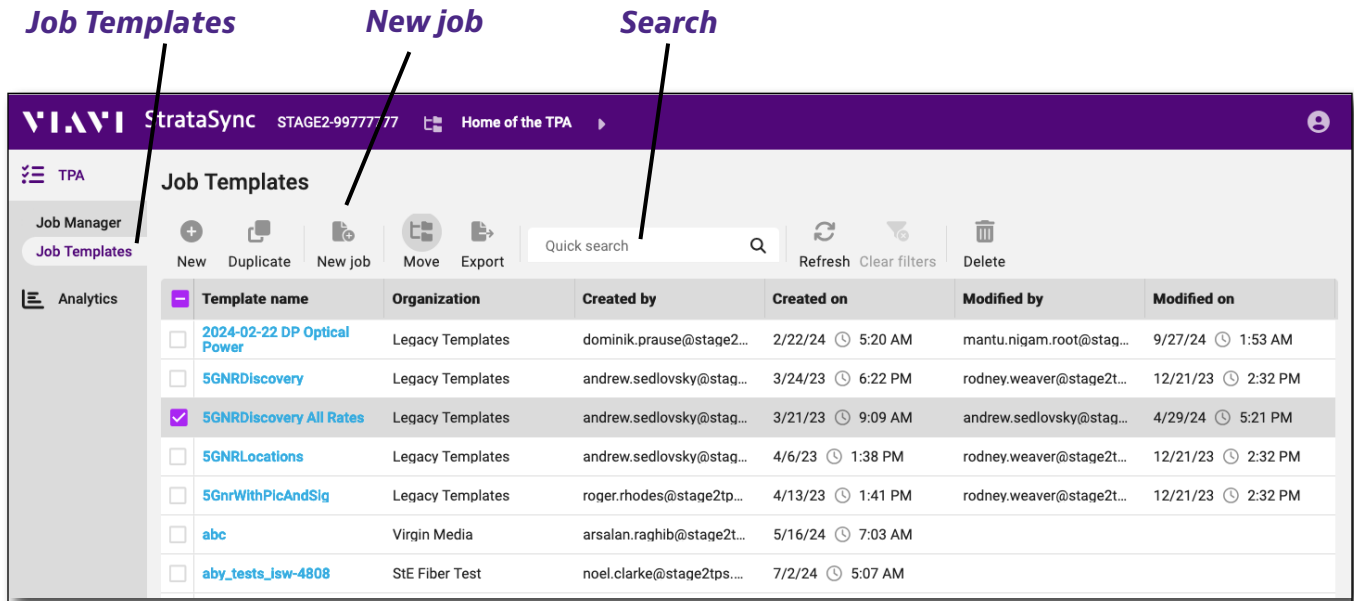
Duplicating a template



Adding job attributes

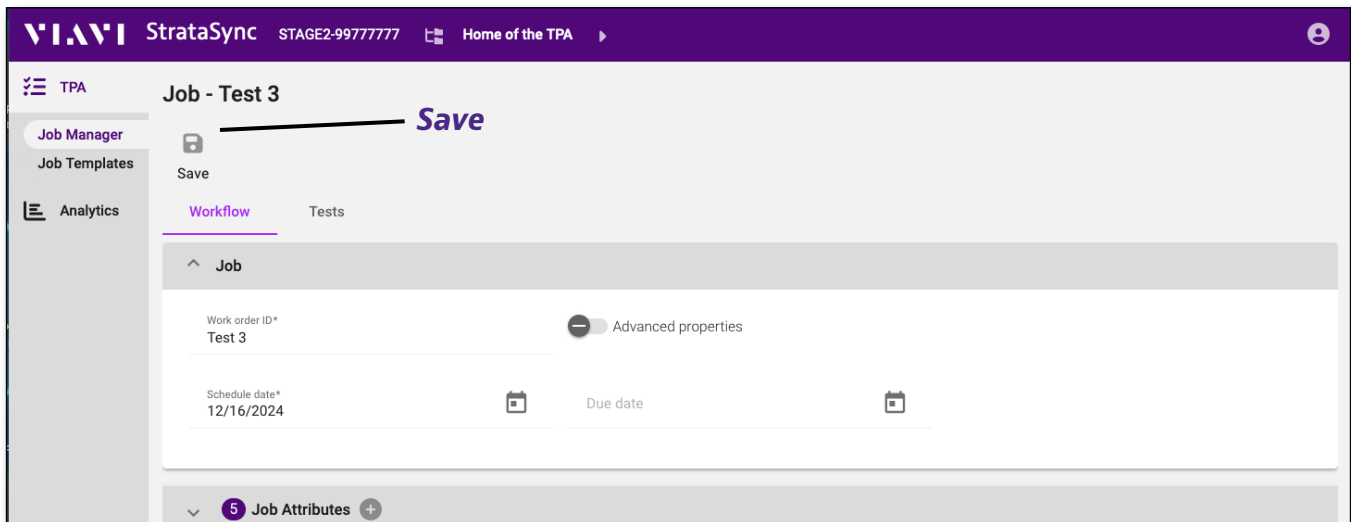
Creating a job from a template

1. From the Job Manager, select the **Job Templates** tab. The Templates List screen appears.
2. Select the template you want to base the job on or use the search box to find it, then select **New job**. The Job screen appears, based on the template you chose.

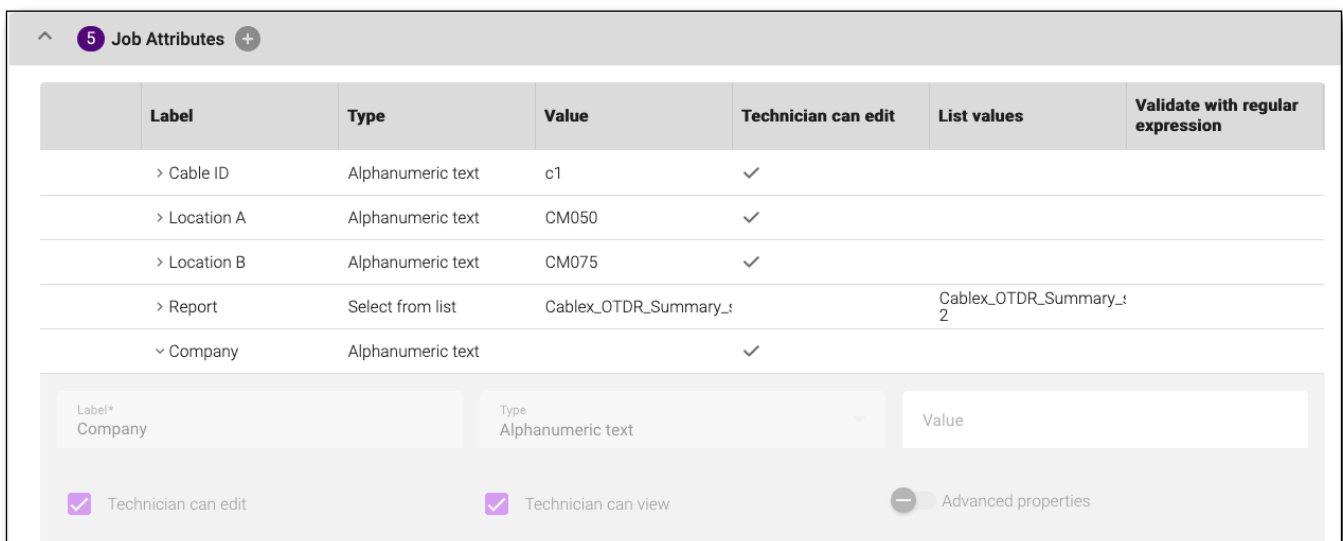


Templates List

3. Enter a unique **Job ID** (required) and optional **schedule date**. You can also enter a work order label, contractor ID, and due date.
4. Use the **Job Attributes** section to add additional detail, such as company name, tech name, job address, job comments, etc. The **Custom** option allows you to create your own attributes, as well.
 - To delete an attribute, hover over the row and select the **Delete** button.
 - To move an attribute, hover over the row and select the **Move** button to drag up or down.
5. When done, select **Save** at the top. The job will be added to the Jobs List.



Creating a job

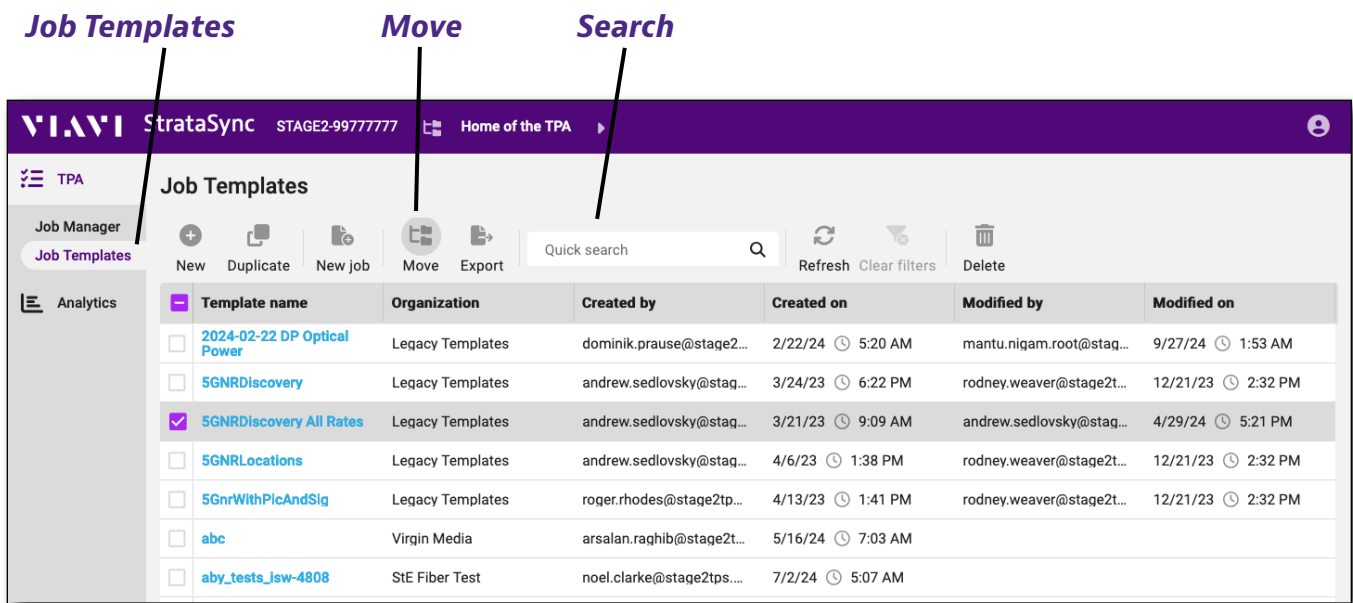


Adding job attributes

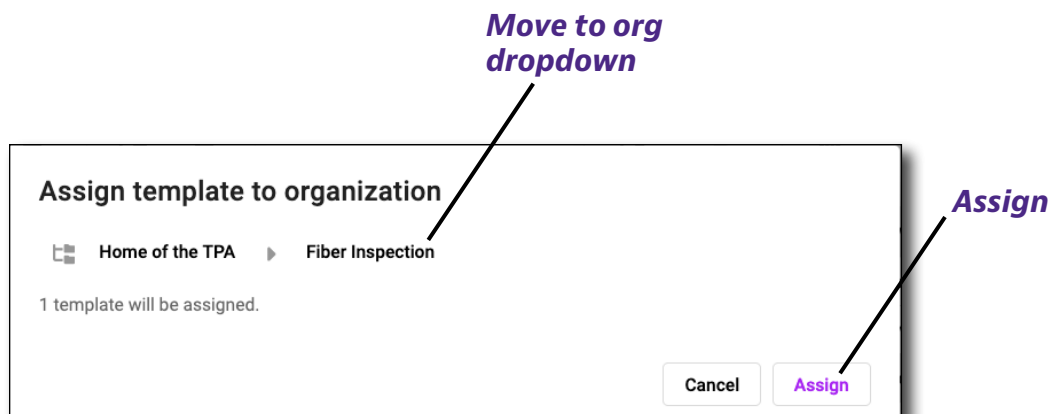
Moving a job template

You can move a template to another organization or sub-org.

1. From the Job Manager, select the **Job Templates** tab. The Templates List screen appears.
2. Select the template you want to move, then select **Move**. The Assign template to organization screen appears.
3. From the dropdown, choose the organization you want to move to, then select **Assign**. The template will be moved to the organization.



Templates List



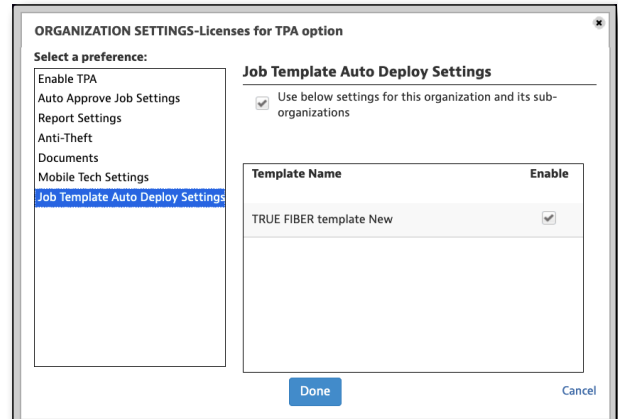
Deploying a job template

TPA job templates are now auto-deployed to any user (and their associated instruments) in the organization (or sub-organizations) where the job template is saved.

Techs can then create jobs from the job template from Mobile Tech or in the instrument.

Please note that the StrataSync account must be licensed for SS-PRO or higher.

For details, see *"Job template auto deploy settings" on page 230*.



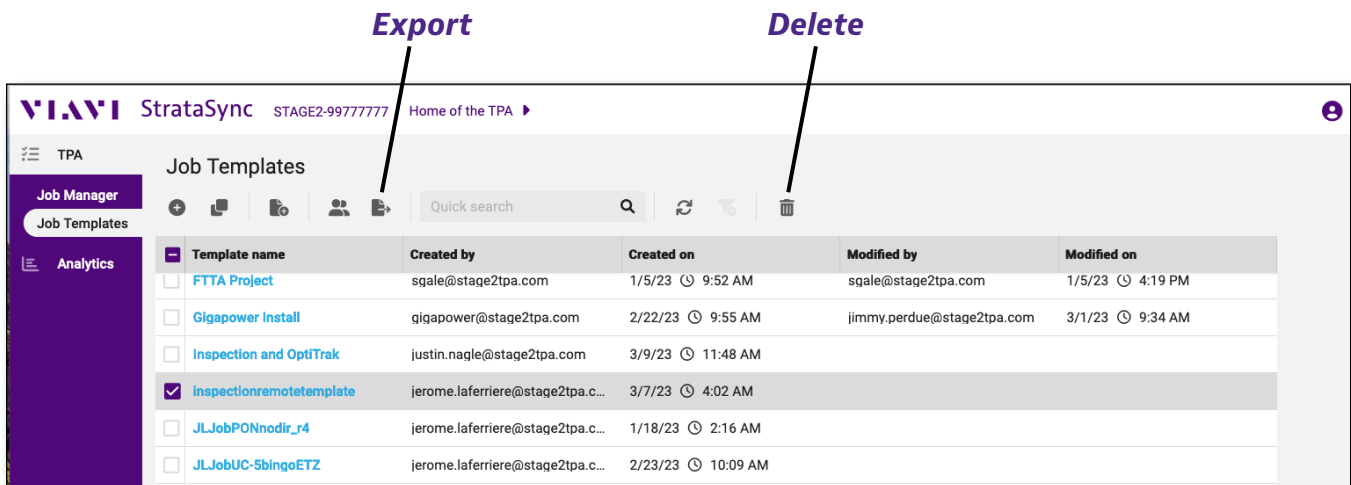
Exporting a job template

From the Job Manager, select the template(s) you want to export, then select **Export**. The JSON file(s) will download to your desktop.

Deleting a job template

From the Job Manager, select the template(s) you want to delete, then select **Delete**. You will be asked to confirm. Select **Delete** again.

The template(s) will be removed from the Templates List.



Creating reports

When TPA jobs are approved (either manually or via auto-approval), StrataSync can generate a Summary and/or a Detailed PDF report, based on system-wide or per-organization settings. By default, reporting is disabled.

Summary PDFs when enabled (per account or sub-org) are selected in the job template creation phase.

The Detailed PDF report concatenates any test results uploaded from VIAVI test instruments associated with the approved job which are PDF-formatted. Test results in other formats are not included.

Please note that the StrataSync account must be licensed for SS-PRO or higher. Contact your VIAVI sales representative for support on any of these topics.

See *"Report settings" on page 228 (per-org settings) or page 295 (system-wide)*.

Analytics Dashboard

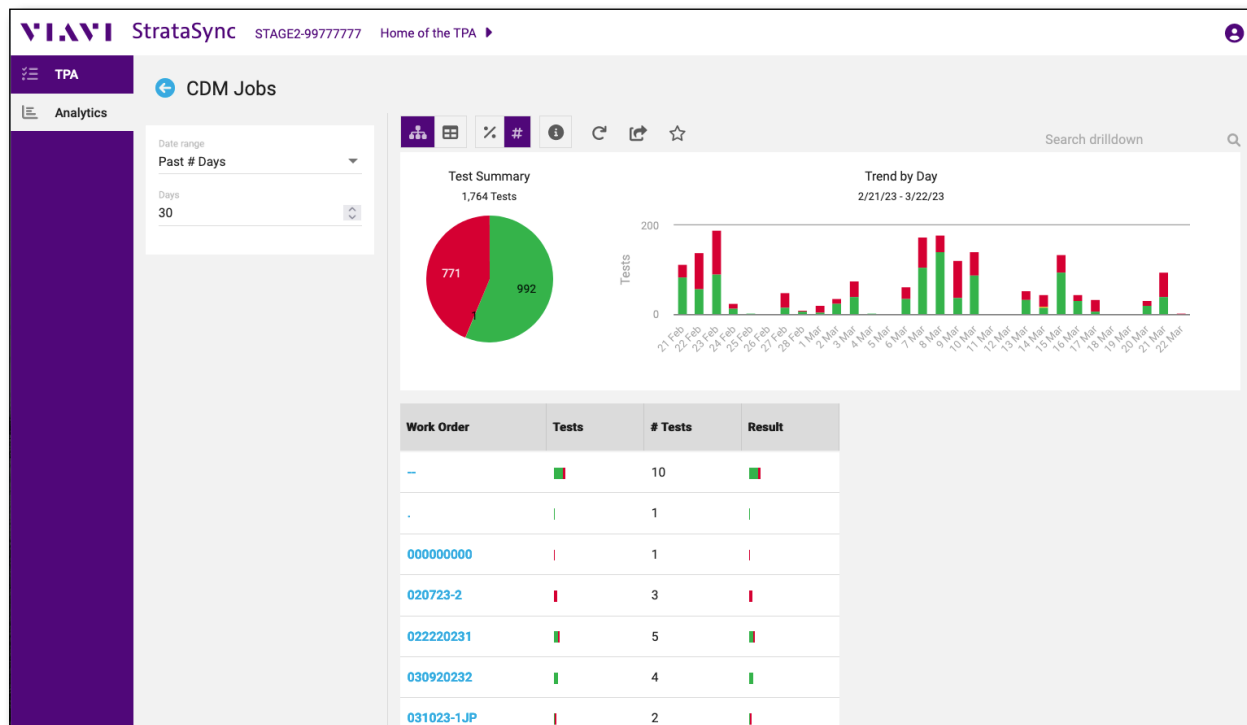
The **Analytics Dashboard** supports work order-associated CDM (Common Data Model) JSON-formatted test results from any VIAVI test instrument.

From the Job Manager dashboard, select the **Analytics** tab on the left to show the Reports List. Here, you can choose a report to show the individual dashboard.

This dashboard is covered in detail in the Analytics chapter. See [Analytics Dashboard on page 58](#).

Report	Organization Owner	Last Updated	Tags
CDM Jobs	Home of the TPA	2023-01-24	
CDM Tests by Type	Home of the TPA	2023-01-24	
CDM Tests by Type - 2	Home of the TPA	2023-03-07	
Combo TruePON and 1650nm tests	Home of the TPA / UseCase6 / VirginMedia UK	2023-01-26	
Fiber Closeout - Bidirectional	Home of the TPA	2023-01-26	
Fiber Closeout - Unidirectional	Home of the TPA	2023-01-26	
Fiberio & number & wavelength report with hirtTTDR events	Home of the TPA	2023-01-26	
Fiberio & number & wavelength report with unklrTTDR events	Home of the TPA / UseCase2 / UGG	2023-02-13	
Fiberio & number & wavelength report with unklrTTDR events	Home of the TPA	2023-01-26	
Fiberio & number & wavelengths bad events	Home of the TPA	2023-01-26	
Fiberio & number & wavelengths bad events hirtTTDR analyze	Home of the TPA / UseCase2 / UGG	2023-02-13	
Fiberio & number & wavelengths bad events unklrTTDR analyze			
Fiberio & number &			

Analytics Reports List



Analytics Dashboard

Assets

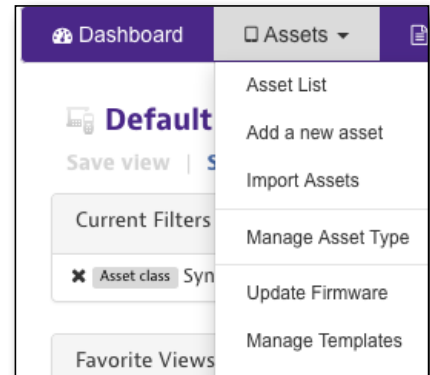
This chapter covers how to use the Asset Management features of StrataSync, including the following:

- "Assets" on page 106
- "Searching and sorting" on page 107
- "Views" on page 110
- "Asset List" on page 113
- "Adding new assets" on page 129
- "Importing assets" on page 130
- "Managing asset types" on page 132
- "Updating firmware" on page 136
- "Managing configuration templates" on page 140
- "Managing asset options" on page 156
- "Managing asset groups" on page 162

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

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	Out of Sync
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_947	947	Beijing	jdsu_demo1	jdsu	demo1	Active	Out of Sync
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_948	948	Beijing	jdsu_demo1	jdsu	demo1	Active	Out of Sync
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_4709	4709	Beijing	jdsu_demo1	jdsu	demo1	Active	Out of Sync
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	Out of Sync
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	Out of Sync
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2541	2541	Beijing	jdsu_demo1	jdsu	demo1	Active	Out of Sync
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_2548	2548	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Out of Sync
Syncable	T-BERD/MTS 6000A	T-BERD 6000A	T-BERD 6000A_30421	30421	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Out of Sync
Syncable	T-BERD/MTS 5800 V2	T-BERD 5800 V2	T-BERD5800V2_WMME...	WMME0062540050	Beijing	jdsu_demo1	jdsu	demo1	Active	Out of Sync
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_18816	18816	Wangjing	nj070209	nj070209_first	nj070209_last	Active	Out of Sync
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.

Search bar

Asset class	Asset Type	Model	Unique ID
<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 20PMVFL

Search results for 'T-BERD':

- 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

- Model T-BERD

Favorite Views

My Saved views ✚

[Default View](#)

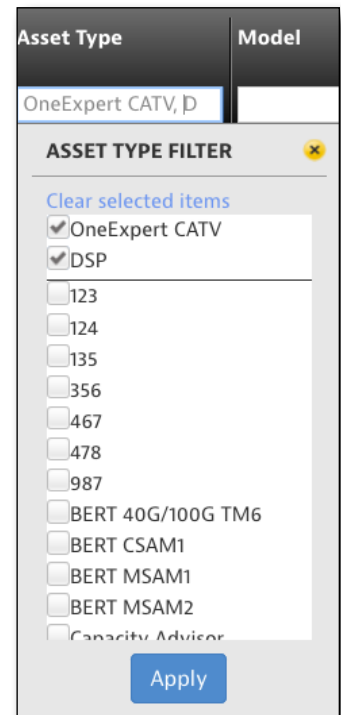
Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status	Last Sync Status	
<input type="checkbox"/>	Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_2805	2805	Stage JDSU Demo1	demo1	JDSU	Demo1	Stolen	O
<input type="checkbox"/>	Syncable	T-BERD/MTS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



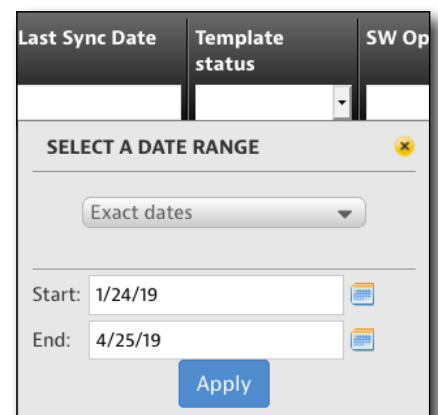
Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.

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:

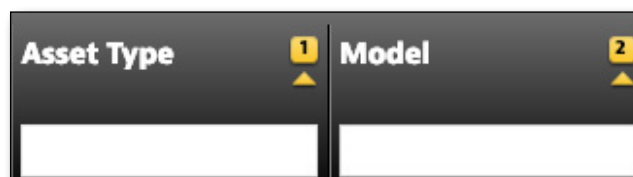


You can save custom filters to a favorite view for easy reference. See ["Saving views" on page 111](#).

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.

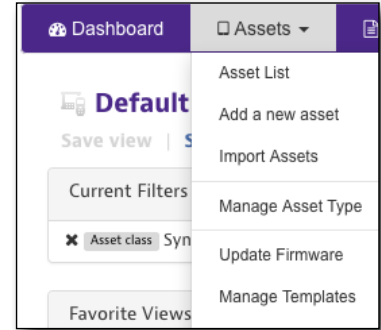


Views

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.

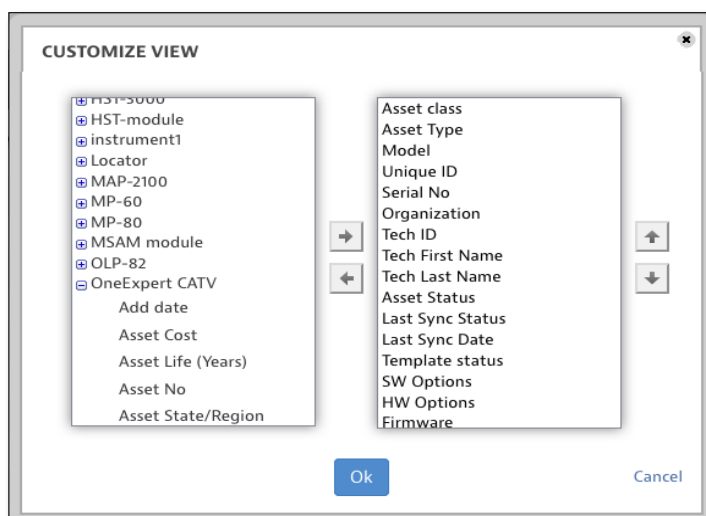


Save view as
Customize view

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_frst	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_947	947	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_948	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_frst	tsd1_last	Active	Sync Needed	12/10/2013 15
Syncable	SmartClass TPS	SCTPS-AB-CU	000000654321	000000654321	West Region	4580409	4580409_frst	4580409_last	Active	OK	02/05/2014 04

Assets List Default View

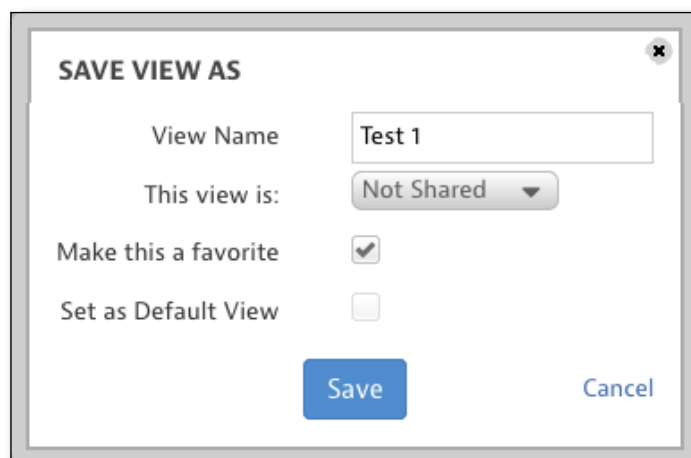
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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

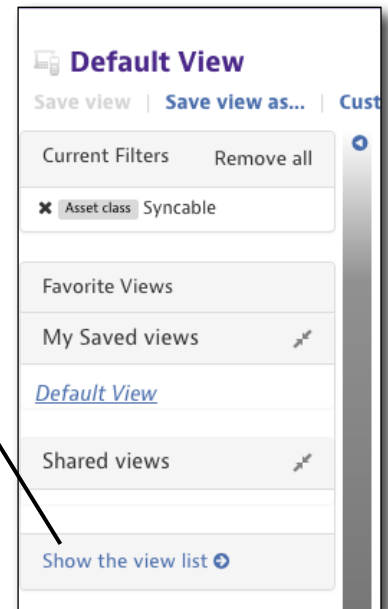
The new view is listed under the Favorite Views section on the left.



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"/>	Rename Delete
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

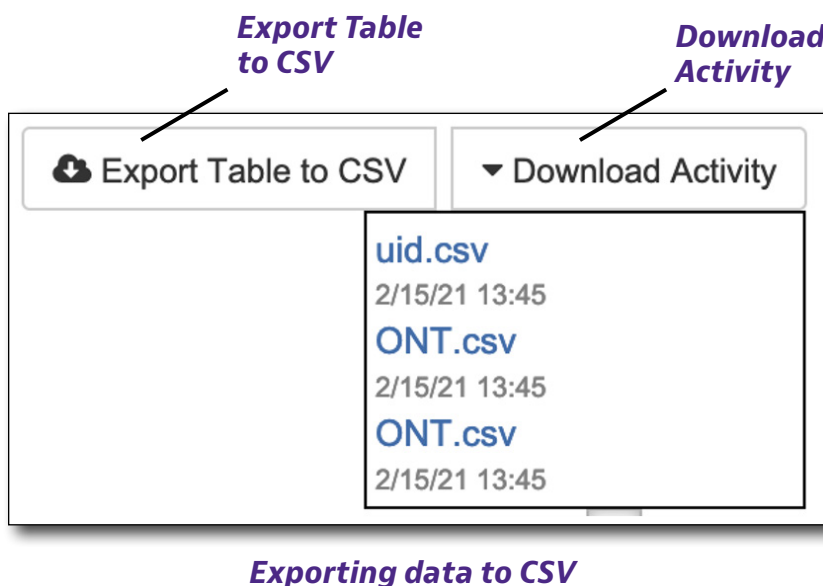
Exporting lists to CSV

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.



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.

The screenshot displays the 'Asset List > Asset Khanh10004' page. The asset is identified as 'ONX-620: S/N Khanh10004'. The 'Status' section shows the asset is 'Active' with a dropdown menu and an 'Update Firmware' button. The 'Device details' section lists: Asset Type: OneExpert CATV, Model: ONX-620, Manufacturer: (blank), Description: (blank), Catalog Number: (blank), Unique ID: Khanh10004, and Serial No: Khanh10004. The 'Sync History' section shows a list of events: 08/03/2018 08:55 Sync Needed.Template [name=Beijing Updat..., 08/03/2018 08:45 User changed Techid to jdsu_demo1, asset will..., 08/03/2018 08:45 Sync Needed.Template [name=Beijing Updat..., 08/03/2018 08:42 cancelled firmware and config file updates.Te..., 08/03/2018 08:32 User changed Techid to demo1, asset will be u... Each event has a 'View Full Sync Log' link. The right sidebar contains 'Actions' (View Mainframe History, View Configuration), 'Most Recent Test Data' (View all tests of this device), and 'Documentation' (View more documents).



NOTE:

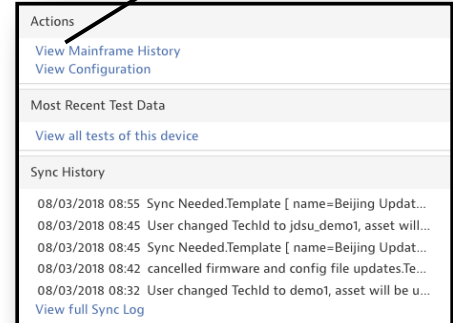
You don't have to manually add syncable assets. Just sync them to automatically add them and all details to your Asset List.

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	

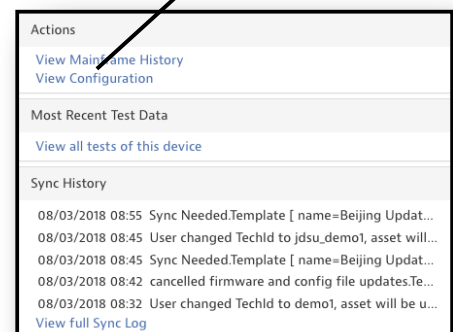
Page 1 of 1

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.

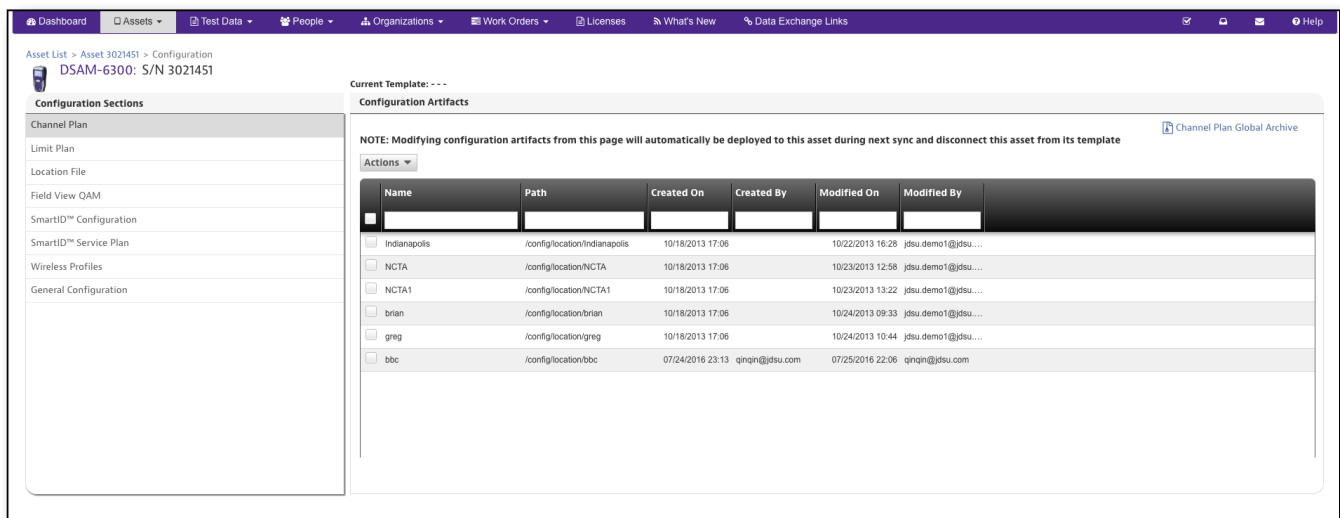
View Configuration



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***



Asset List > Asset 3021451 > Configuration
DSAM-6300: S/N 3021451

Current Template: ---

Configuration Sections

- Channel Plan
- Limit Plan
- Location File
- Field View QAM
- SmartID™ Configuration
- SmartID™ Service Plan
- Wireless Profiles
- General Configuration

Configuration Artifacts

NOTE: Modifying configuration artifacts from this page will automatically be deployed to this asset during next sync and disconnect this asset from its template

Channel Plan Global Archive

Actions

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:

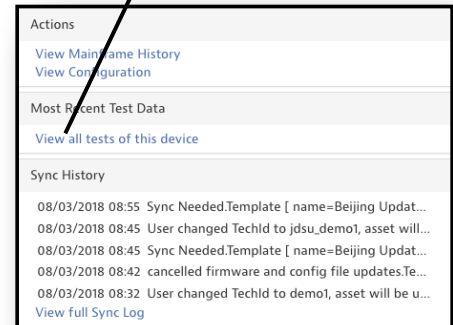
For Edit, Rename, and Delete, changes will be applied to the instrument on the next sync. This also removes this instrument from its template.

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

- Asset Primary Key: 39580

Favorite Views

My Saved views

Default View

Shared views

Show the view list

Actions For 0 selected record(s)

Download Report

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

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View sync log

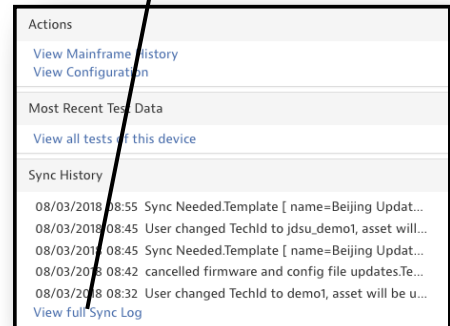
From the Asset Details screen, you can view the configuration sync history of the device.

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

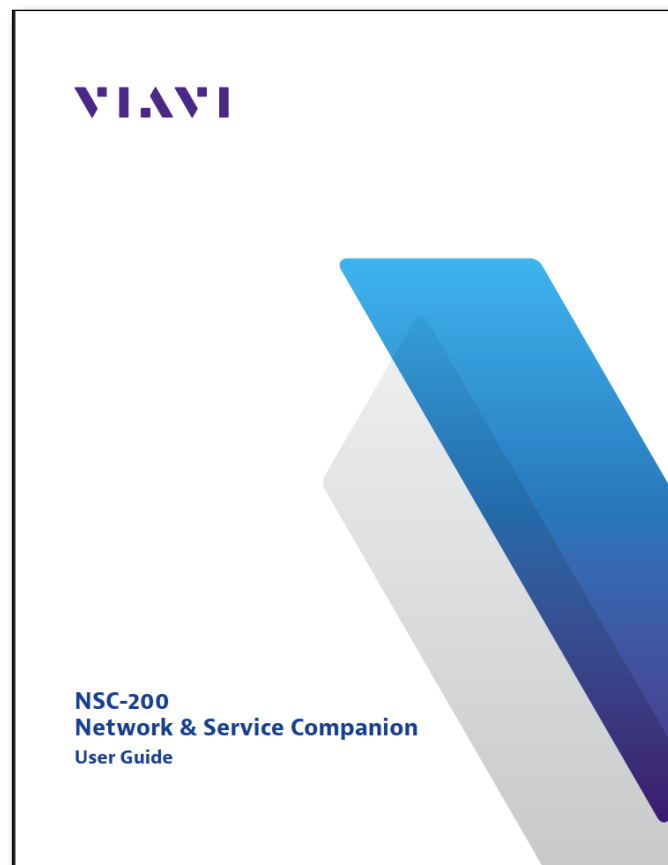
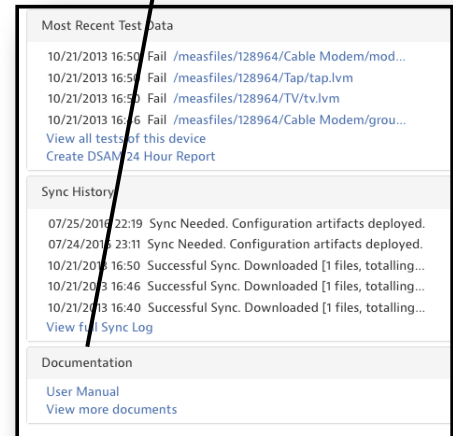


View documentation

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

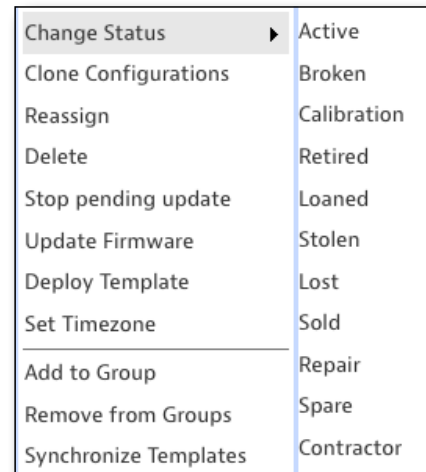


Changing asset status

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**.

Assets with the following status will not sync to StrataSync: **Retired, Stolen, Lost** and **Sold**.



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)

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@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

Page 1 of 22

Reassign Cancel

NOTE:



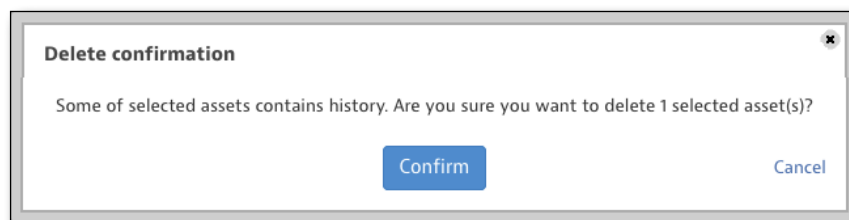
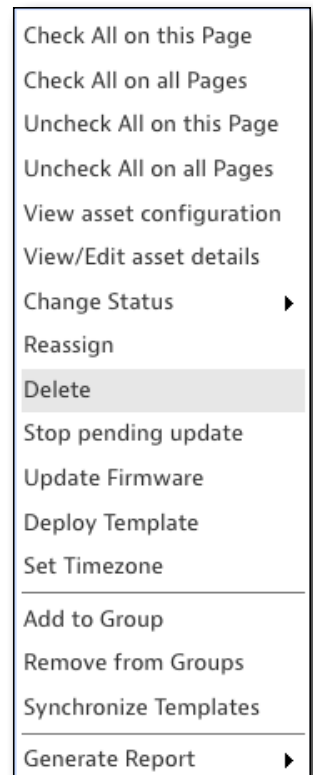
You can also assign the asset to yourself by selecting *Assign to me* at the top right corner.

- When done, click **Confirm**.



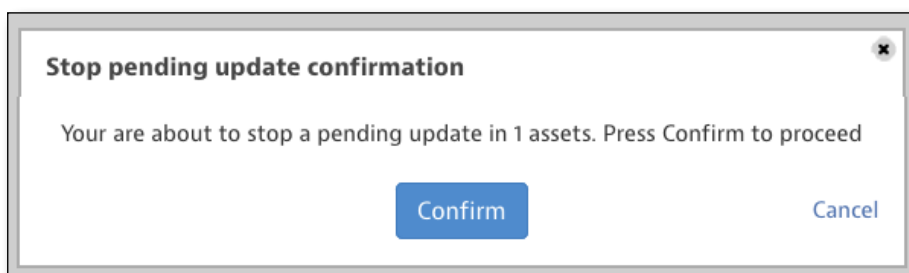
Deleting an asset

- 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**.

Deploy template - select Template

Page 1 of 1

Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modified By
No records found									

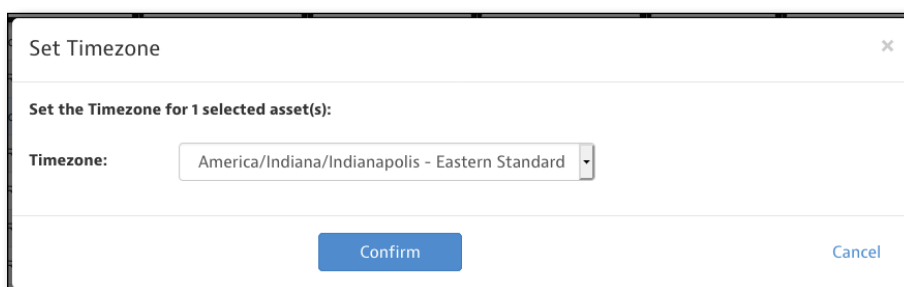
Viewing 0 record(s) Page Size 15 Page 1 of 1

Next

Cancel

Set timezone

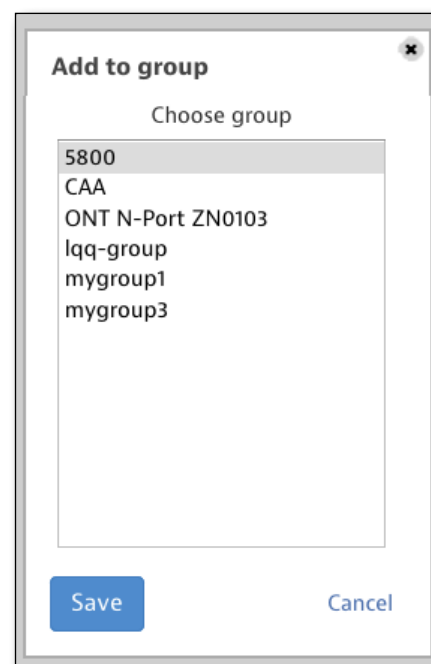
1. From the Assets List, select the checkbox next to the asset (or assets) you want to set the timezone.
2. Right-click the item (or use the **Action** dropdown) and select **Set Timezone**. The Set Timezone screen is displayed.
3. Select the timezone from the dropdown and click **Confirm**.



Add to group

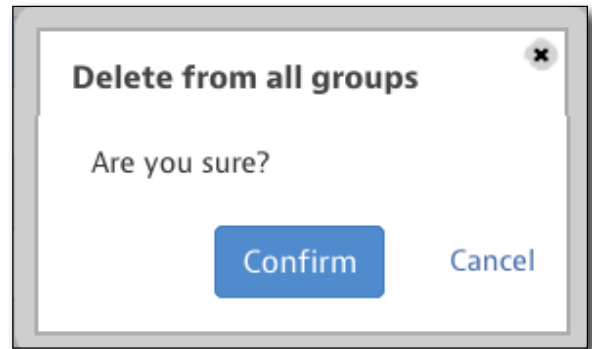
Asset groups provide a way to organize your assets for easy management and deployment.

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**.



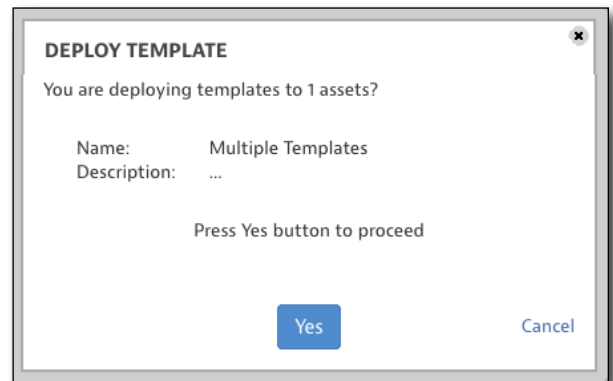
Remove from groups

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 ▼

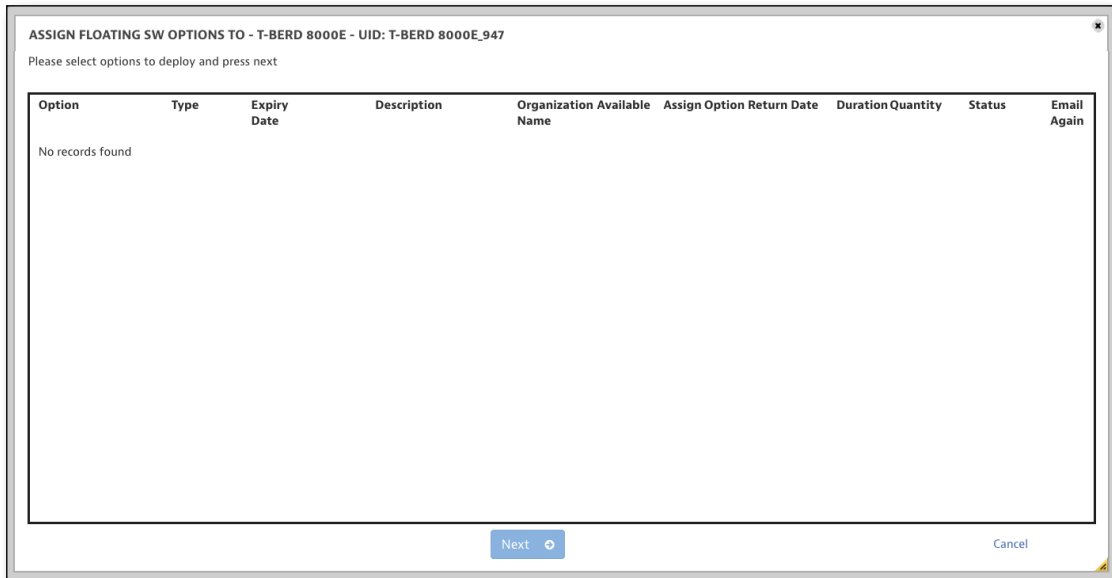
* Time Period Last 30 days ▼

View Report
Cancel

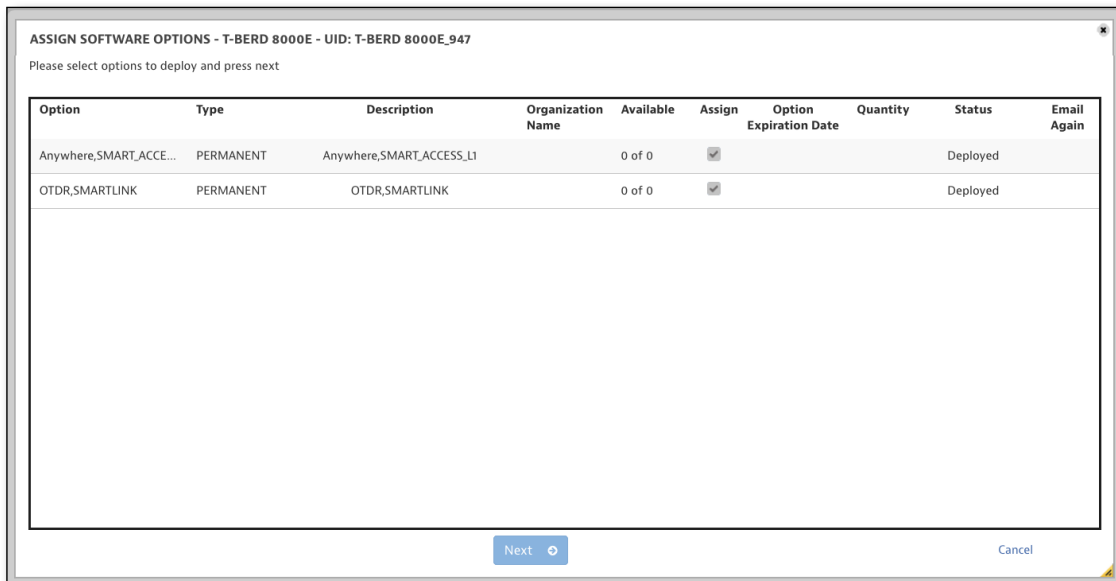
Asset Type	Organization Name	Serial No	Unique ID	Tech ID	Tech Name	Parent Type	Parent Serial No	Option Name
T-BERD/MTS 8000	Beijing	947	T-BERD 8000E_947	jdsu_demo1	jdsu_demo1@jdsu....			Anywhere.SMART_ACC...
T-BERD/MTS 8000	Beijing	947	T-BERD 8000E_947	jdsu_demo1	jdsu_demo1@jdsu....			OTDR.SMARTLINK

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.

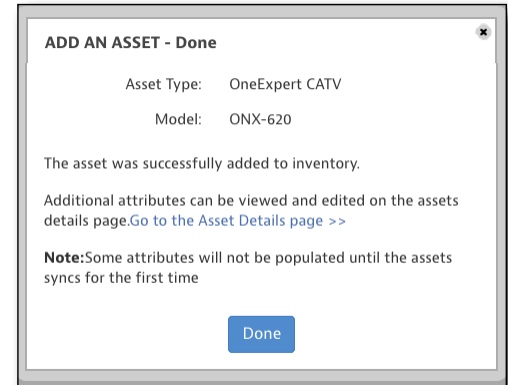
2. Select the asset type and model, then click **Next**. The Asset Details screen appears.

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

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
fp47637	Yvan	Frosio	dsam1@jdsu.com	Administrator	Stage_JDSU Demo1
l6d1	l6d1_first	l6d1_last	l6d1_16653523	Unidentified TechId	Stage_JDSU Demo1
58729	58729_first	58729_last	58729_16653523	Unidentified TechId	Stage_JDSU Demo1
57162	qinqn	liu	qinqn@jdsu.com	Administrator	Stage_JDSU Demo1
cu57670	lang	cut	lang.cut@jdsu.com	Technician	Stage_JDSU Demo1
lq	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
yashvi	YCSHN_first	YCSHN_last	yashvi_16653523	Unidentified TechId	Stage_JDSU Demo1
yashin	YCSHN_first	YCSHN_last	yashin_16653523	Unidentified TechId	Stage_JDSU Demo1
yes	YCS_first	YCS_last	yes_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

4. 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.

Please note this feature does not support importing Accessory or Module asset classes.

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

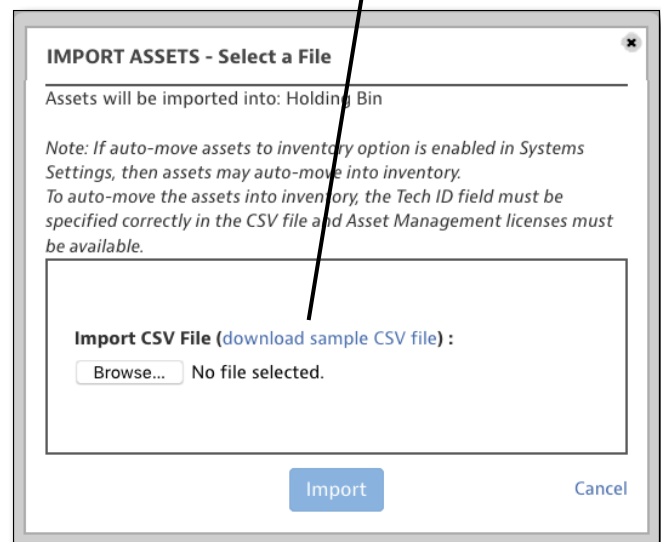
Make sure you retain the header row and enter the data fields starting on row 2, as follows:

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

3. 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.

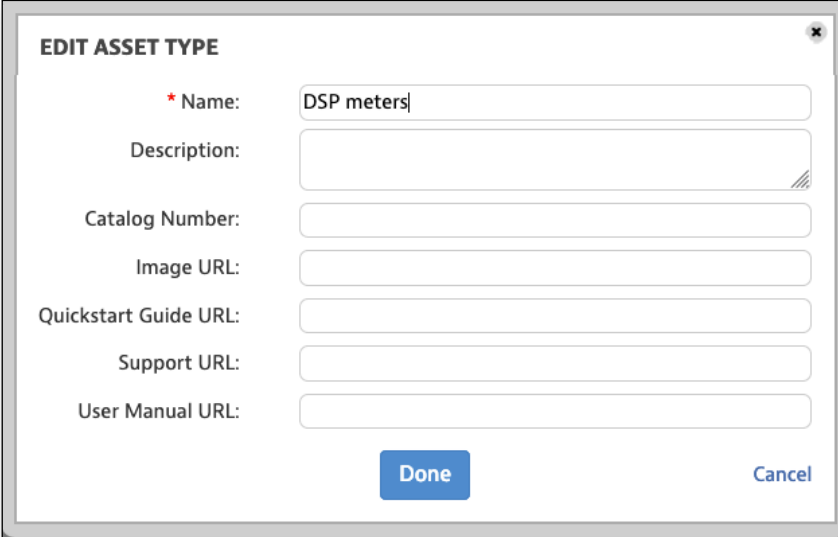
Enter the information as needed, including adding a name, description, and any URLs you want to include, and click **Done**.

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.

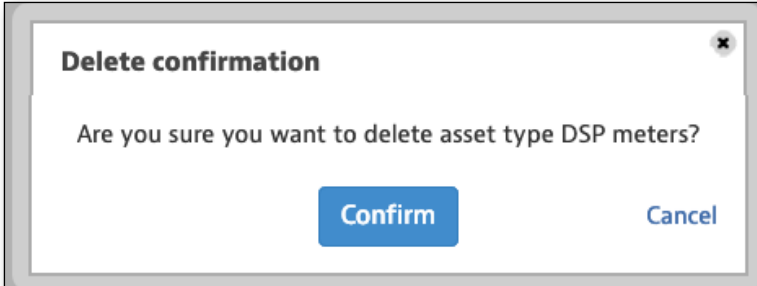
Edit the information as needed, including adding a description and any URLs you want to include, and click **Done**.



The screenshot shows a dialog box titled "EDIT ASSET TYPE" with a close button in the top right corner. The dialog contains several input fields: "Name" (with a red asterisk) containing "DSP meters", "Description" (empty), "Catalog Number" (empty), "Image URL" (empty), "Quickstart Guide URL" (empty), "Support URL" (empty), and "User Manual URL" (empty). At the bottom, there are two buttons: "Done" (blue) and "Cancel" (gray).

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**.



The screenshot shows a dialog box titled "Delete confirmation" with a close button in the top right corner. The dialog contains the text "Are you sure you want to delete asset type DSP meters?". At the bottom, there are two buttons: "Confirm" (blue) and "Cancel" (gray).

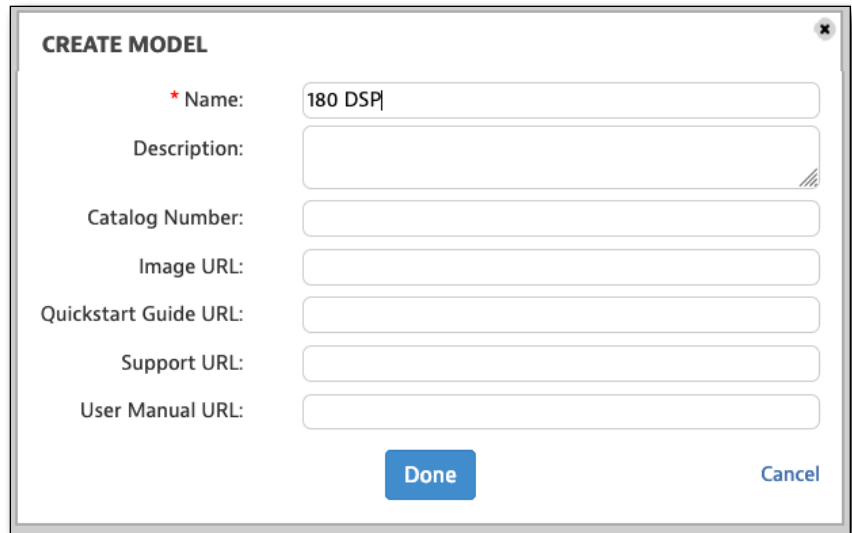
Asset models

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)

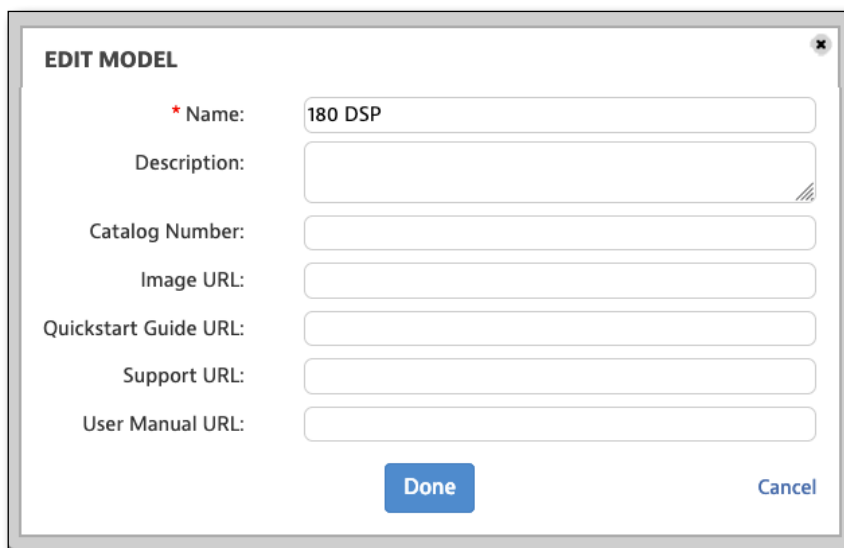
180 DSP

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**.



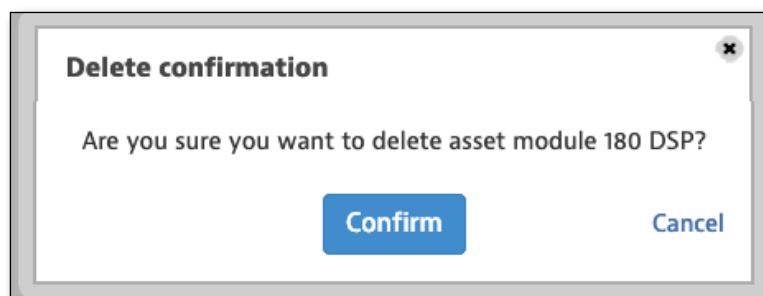
The screenshot shows a dialog box titled "EDIT MODEL" with a close button (X) in the top right corner. The dialog contains several input fields:

- Name:** A text input field containing "180 DSP".
- Description:** A larger text input field.
- Catalog Number:** A text input field.
- Image URL:** A text input field.
- Quickstart Guide URL:** A text input field.
- Support URL:** A text input field.
- User Manual URL:** A text input field.

At the bottom of the dialog, there are two buttons: a blue "Done" button on the left and a "Cancel" button on the right.

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**.



The screenshot shows a dialog box titled "Delete confirmation" with a close button (X) in the top right corner. The dialog contains the following text:

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

At the bottom of the dialog, there are two buttons: a blue "Confirm" button on the left and a "Cancel" button on the right.

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.

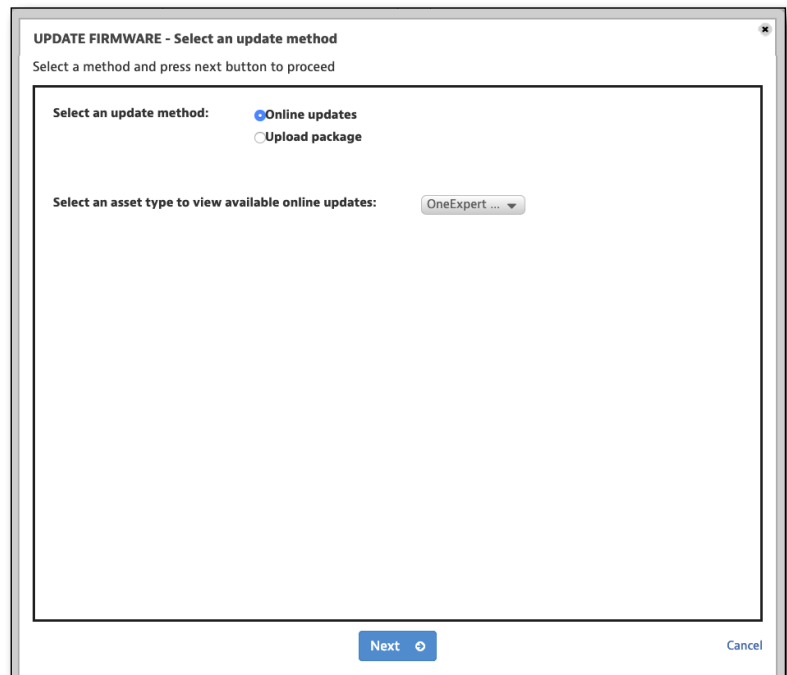
Select the **Assets** tab, and then select **Update Firmware**. The Update Firmware screen appears.

See *"Managing firmware versions" on page 40* and *"Firmware management" on page 281*.

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.

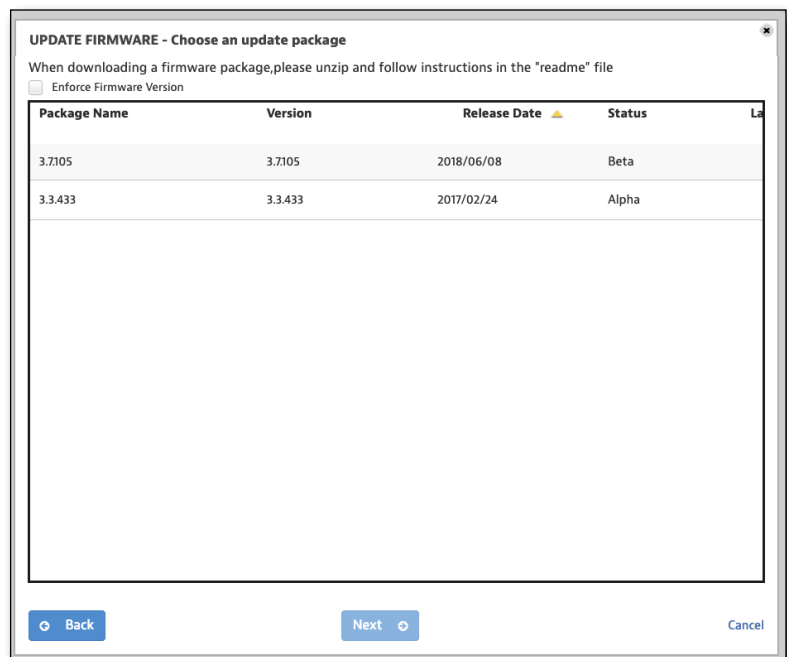


3. Select a package you want to download.

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

When updating firmware, the **Enforce Firmware Version** checkbox at the top is optional.

- If the checkbox is not selected, StrataSync will send the firmware version to the units upon a sync until the unit reports that



it is running the updated firmware version.

After StrataSync confirms the firmware update is completed, StrataSync takes no further action.

- If the checkbox is selected, StrataSync behaves slightly differently. StrataSync will (as before) send the firmware version to the units upon a sync until the unit reports that it is running the updated firmware version. However since the **Enforce Firmware Version** checkbox is selected, StrataSync will continue to monitor the firmware version the unit is running.

If StrataSync discovers the unit is not running the enforced firmware version, StrataSync will send the firmware version to the unit upon a sync until the unit reports that it is running the enhanced firmware version.

StrataSync will continue to monitor the firmware version the unit is running unless **Revoke Enforced Firmware** is selected (in Asset View) or a new firmware version is deployed to the unit.

4. Click **Next**. The Select Assets screen is displayed.
5. Select the assets you want to update by selecting the checkboxes next to each item. Then click **Next**. A confirmation screen appears.

UPDATE FIRMWARE - Select assets

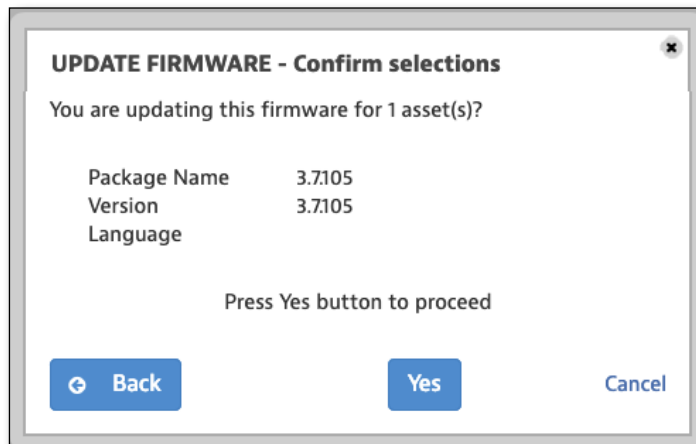
Actions ▾ For 0 selected record(s) Page 1 of 134

Asset No	Serial No	Unique ID	Firmware	Enforced Firmware	HW Version	Organization	Tech ID	Tech First Name	Tech Last Name
<input type="checkbox"/>		ARQA001150001				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

6. Review the information and click **Yes** to confirm. The assets will then be scheduled to update to the firmware on the next sync.



Downloading to a USB flash drive

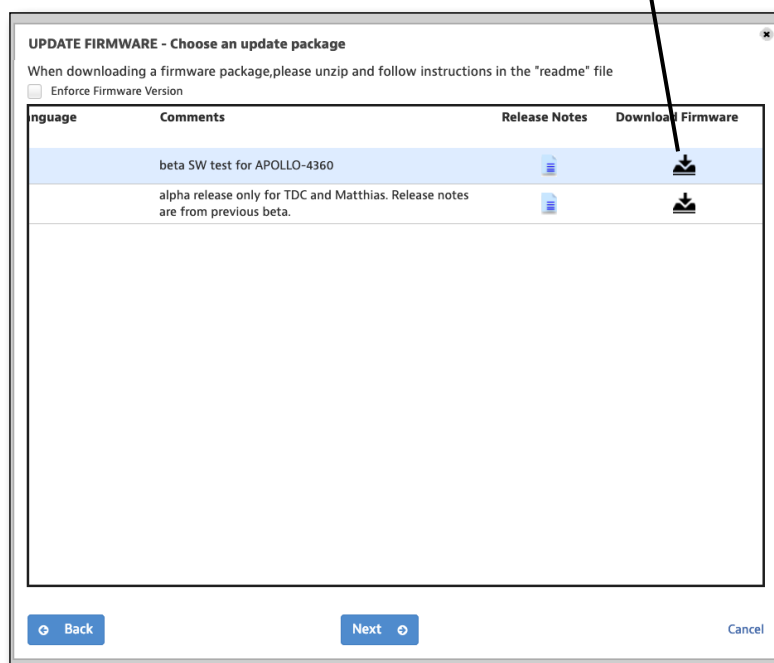
For instruments that support updating the firmware via USB, you can also download packages to your PC. This method is not recommended.

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



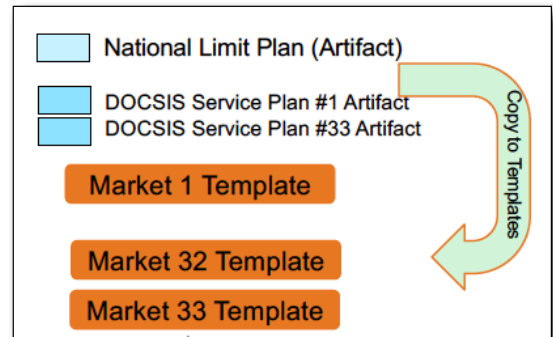
Managing configuration templates

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 TAC@viavisolutions.com.

Global Archives

New Template

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...	qinqin.liu@viavisolutions...	07/19/2018 08...	jdsu.dr
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.dr
Beijing	Beijing	928	Beijing	Stage JDSU Demo1.Beij...	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/20/2018 14...	jdsu.dr
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.dr
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.dr
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.dr
lpttest	lpttest	0	apitest	Stage JDSU Demo1.apit...	Anyone	08/02/2018 09...	ted.robinson@stage.de...	08/07/2018 09...	ted.rot
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.

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.

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

Editing template artifacts

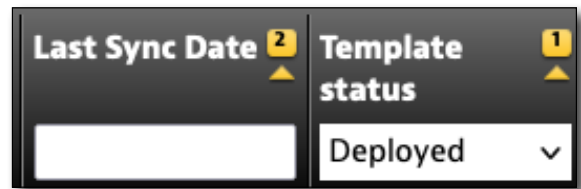
Changing the deployment policy

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

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.

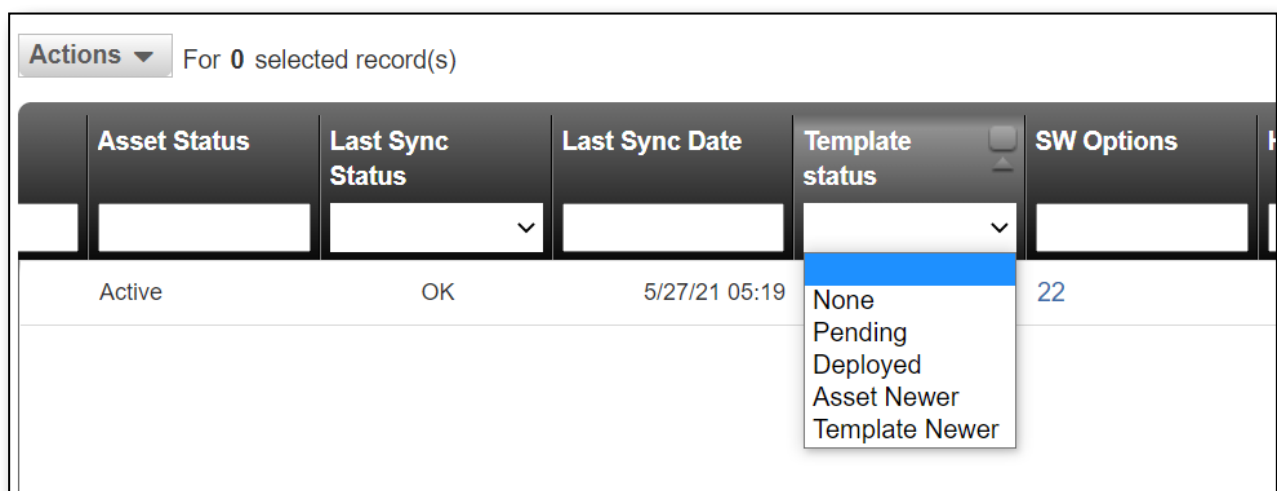
The template on the instrument is different than the template created on StrataSync and the template on the instrument was created after the template on StrataSync.

- **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.

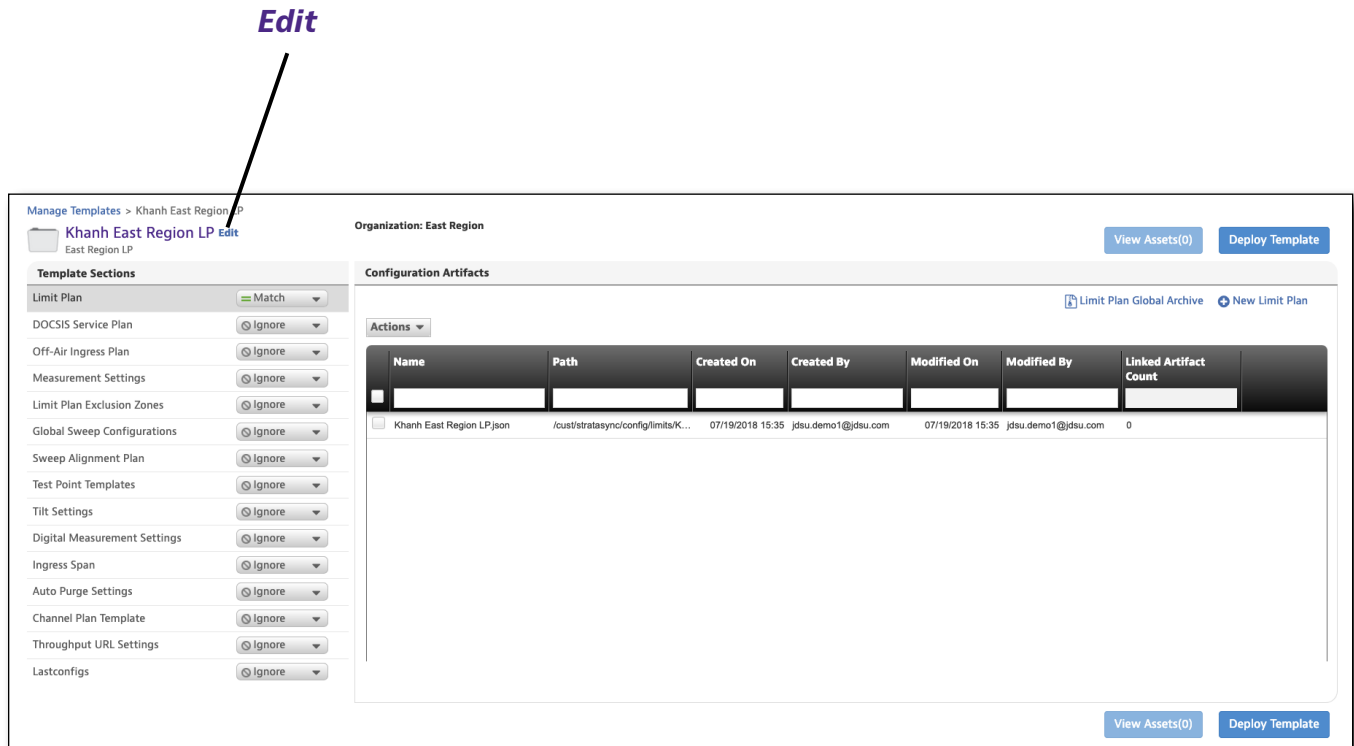
If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.



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

NEW ONEEXPERT CATV TEMPLATE

Edit the name and description for this template

* Name

Description

* Organization

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@viavisolutions...	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	TDMarket1	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.

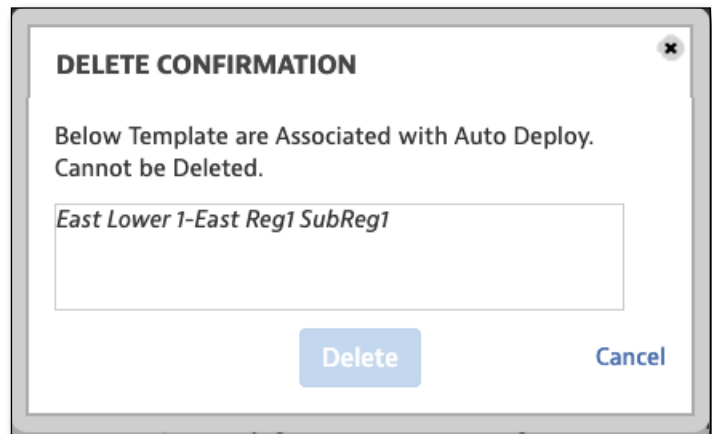
You can also click the asset number to view the assets, as well.

The screenshot displays the 'Associated Assets' screen. At the top, there is a header with 'Default View [unsaved changes]' and navigation options like 'Save view', 'Save view as...', 'Customize view', and 'Schedule Email'. Below this, there are filters for 'Current Filters' (Template: Beijing) and 'View Asset Group: None'. A table of assets is shown with the following columns: Asset class, Asset Type, Model, Unique ID, Serial No, Organization, Tech ID, Tech First Name, Tech Last Name, and Asset Status. The table contains 15 rows of data for 'OneExpert CATV' assets. The interface also includes a sidebar with 'Favorite Views' and 'Shared views', and a bottom status bar showing 'Viewing 2001 record(s)' and 'Page Size 15'.

Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status
Syncable	OneExpert CATV	ONX-620	Khanh10001	Khanh10001	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10002	Khanh10002	Beijing	jdsu_demo1	jdsu	demo1	Broken
Syncable	OneExpert CATV	ONX-620	Khanh10003	Khanh10003	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10004	Khanh10004	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10005	Khanh10005	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10006	Khanh10006	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10007	Khanh10007	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10008	Khanh10008	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10009	Khanh10009	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10010	Khanh10010	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10011	Khanh10011	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10012	Khanh10012	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10013	Khanh10013	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10014	Khanh10014	Beijing	jdsu_demo1	jdsu	demo1	Active
Syncable	OneExpert CATV	ONX-620	Khanh10015	Khanh10015	Beijing	jdsu_demo1	jdsu	demo1	Active

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.

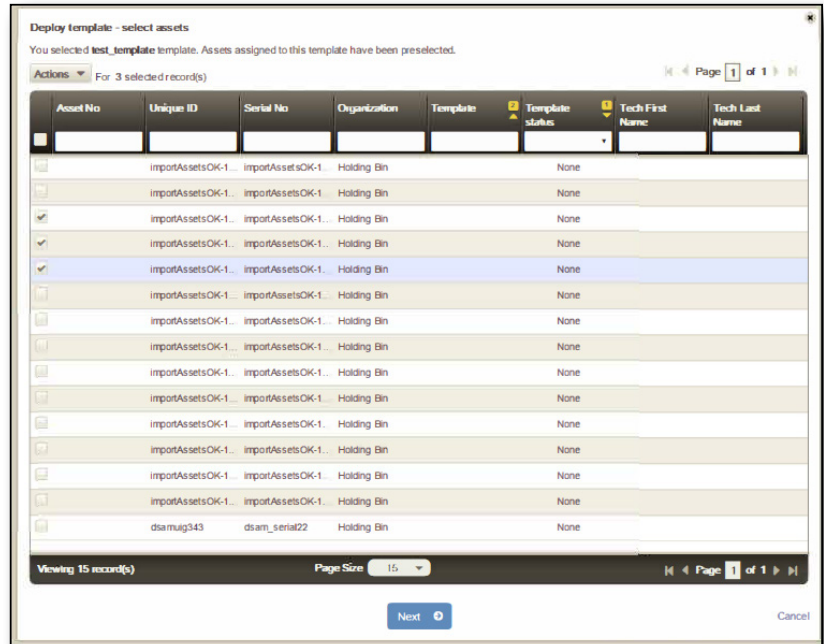
Deploy Template

The screenshot shows the "Manage Templates" interface for "Khanh East Region LP". The page is organized into several sections:

- Organization:** East Region
- Template Sections:** A list of template sections with "Ignore" buttons for most, and a "Match" button for "Limit Plan".
- Configuration Artifacts:** A table with columns: Name, Path, Created On, Created By, Modified On, Modified By, and Linked Artifact Count. One artifact is listed: "Khanh East Region LP.json" with path "/cus/stratsync/config/limits/K...".
- Actions:** A dropdown menu is visible above the table.
- Buttons:** "View Assets(0)" and "Deploy Template" buttons are located in the top right and bottom right corners of the main content area.

An arrow points from the text "Deploy Template" to the "Deploy Template" button in the top right corner of the interface.

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**.

Select Organization

Auto Deploy Settings for East Lower 1 ×

Use Organization Template Settings for this organization and its Sub-organizations - Selecting checkbox will override parent organizations template auto deploy settings.

Enable Auto Deploy for AssetType - Indicates if template auto deploy is enabled for Asset Type.

+ Select Organization

Use Organization Template Settings for this organization and its Sub-organizations	Enable Auto Deploy for OneExpert CATV	Force Auto Deploy	Organization
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	East Reg1 SubReg1

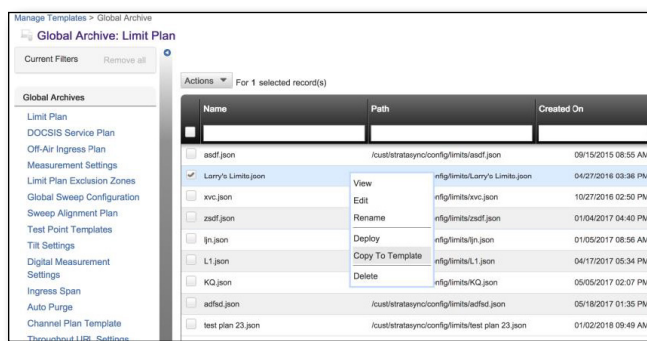
Save
Cancel

Artifact linking

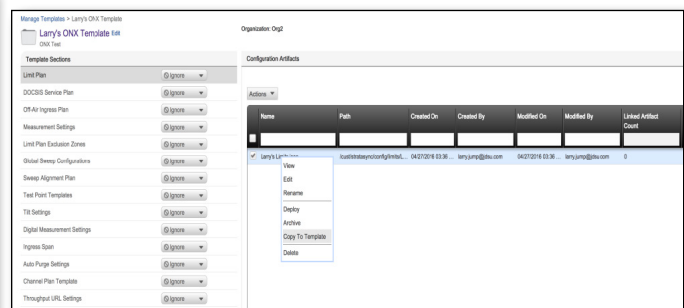
Artifact linking provides synchronization between parent and child configuration artifacts. Changes made to the parent configuration artifact will be propagated to the child configuration artifact.

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 255.

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

Manage Templates > Global Archive

Global Archive: Limit Plan

Current Filters Remove all

Global Archives

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

Actions For 0 selected record(s)

Name	Path	Created On	Created By	Modified On	Modified By	Linked Artifact Count
No records found						

Page 1 of 1

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



Manage Templates: OneExpert CATV [change](#)

Current Filters [Remove all](#)

Global Archives

- Limit Plan
- DOCSIS 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"/> 76568Lnk		1	JDSU	JDSU	Anyone	2018/07/27 2:...	jdsu@jdsu.com	2018/07/27 3:...	jdsu@jdsu.com

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. It features a top navigation bar with 'Default View', 'Save view', 'Save view as...', 'Customize view', and 'Schedule Email'. On the right, there are links for 'Import Options', 'Floating Option Utilization', and 'Download Report'. A left sidebar contains 'Current Filters', 'Favorite Views', 'My Saved views', 'Default View', 'Shared views', and 'Show the view list'. The main area is a table with 12 columns: License Type, Catalog Number, Description, Organization Name, Full Org Path, Asset Type, Expiration Date, Total Quantity, Available, Assigned, Orders, and Duration. The table lists 18 records, including permanent and floating licenses for various network and site-related assets. At the bottom, it shows 'Viewing 257 record(s)', 'Page Size 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 - Catalog No: C510GELAN-U1' interface. It includes a sidebar with 'Default View' and 'Current Filters' (Asset Type: MAP-2100, T-BERD/MTS 5800, T-BERD/MTS 5800 V2, T-BERD/MTS 5800-100G, T-BERD/MTS 5882). The main area displays a table with columns: Assign, Asset Type, Serial No, Unique ID, Tech ID, Tech FullName, Parent Type, Parent Serial No, Quanti..., Status, and Regener... Email. The 'Assign' column contains checkboxes for each row. A red arrow points to this column.

Assign	Asset Type	Serial No	Unique ID	Tech ID	Tech FullName	Parent Type	Parent Serial No	Quanti...	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**.

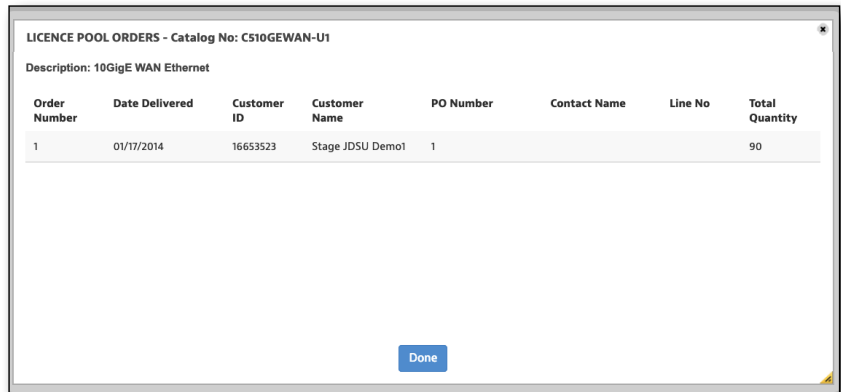
The option will be deployed to the assets on the next sync.

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 two buttons: 'Confirm' and 'Cancel'.

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.



LICENCE POOL ORDERS - Catalog No: C510GEWAN-U1
Description: 10GigE WAN Ethernet

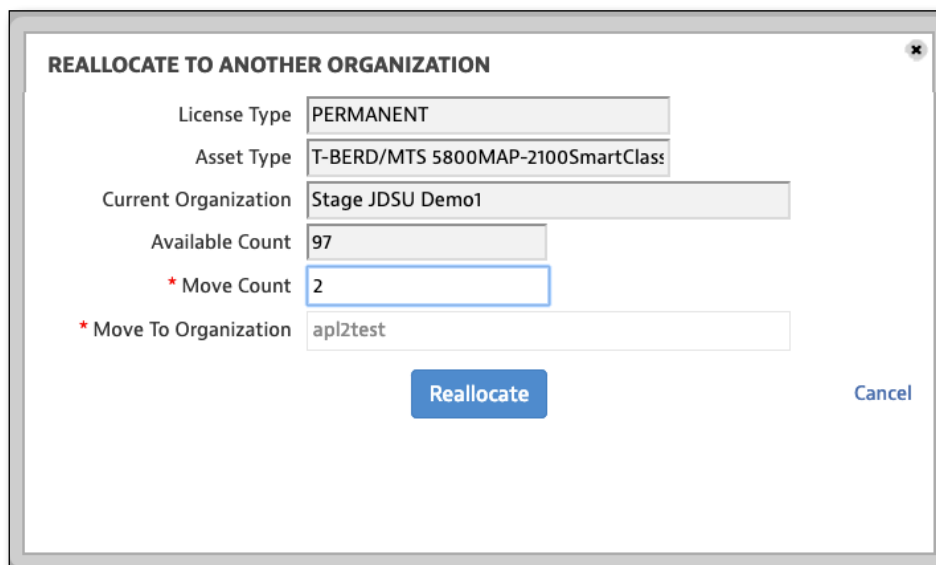
Order Number	Date Delivered	Customer ID	Customer Name	PO Number	Contact Name	Line No	Total Quantity
1	01/17/2014	16653523	Stage JDSU Demo1	1			90

Done

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

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.

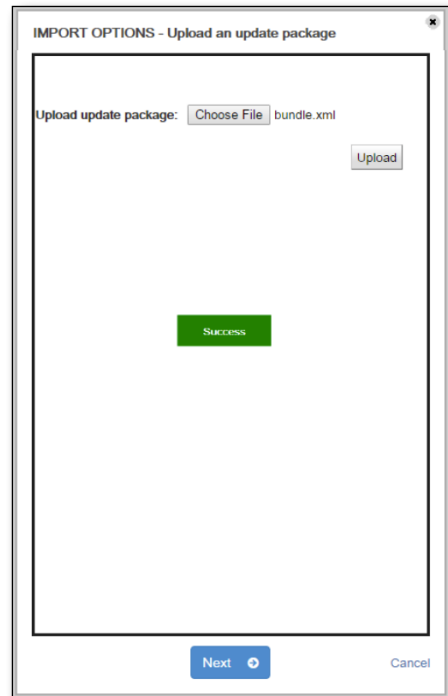
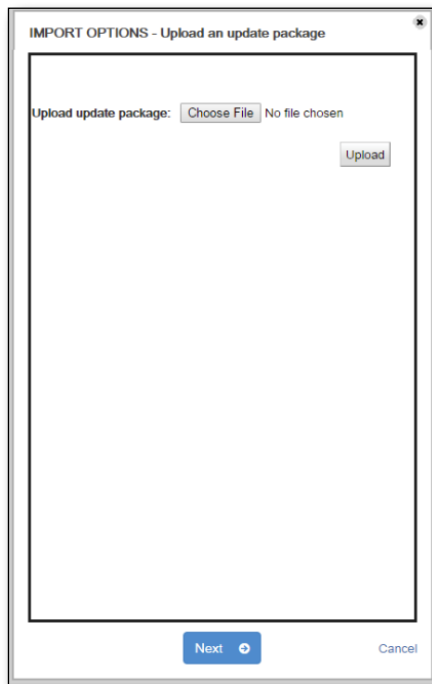
Import Options

The screenshot displays the 'Import Options' interface. At the top right, there is a button labeled 'Import Options' with a red arrow pointing to it. Below this, there are navigation and utility buttons: 'Floating Option Utilization', 'Download Report', and a page indicator 'Page 1 of 18'. The main area contains a table with the following data:

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	

At the bottom of the table, it indicates 'Viewing 257 record(s)' and 'Page Size 15'. The page navigation shows 'Page 1 of 18'.

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.

IMPORT OPTIONS - Select assets

For 1 selected assets

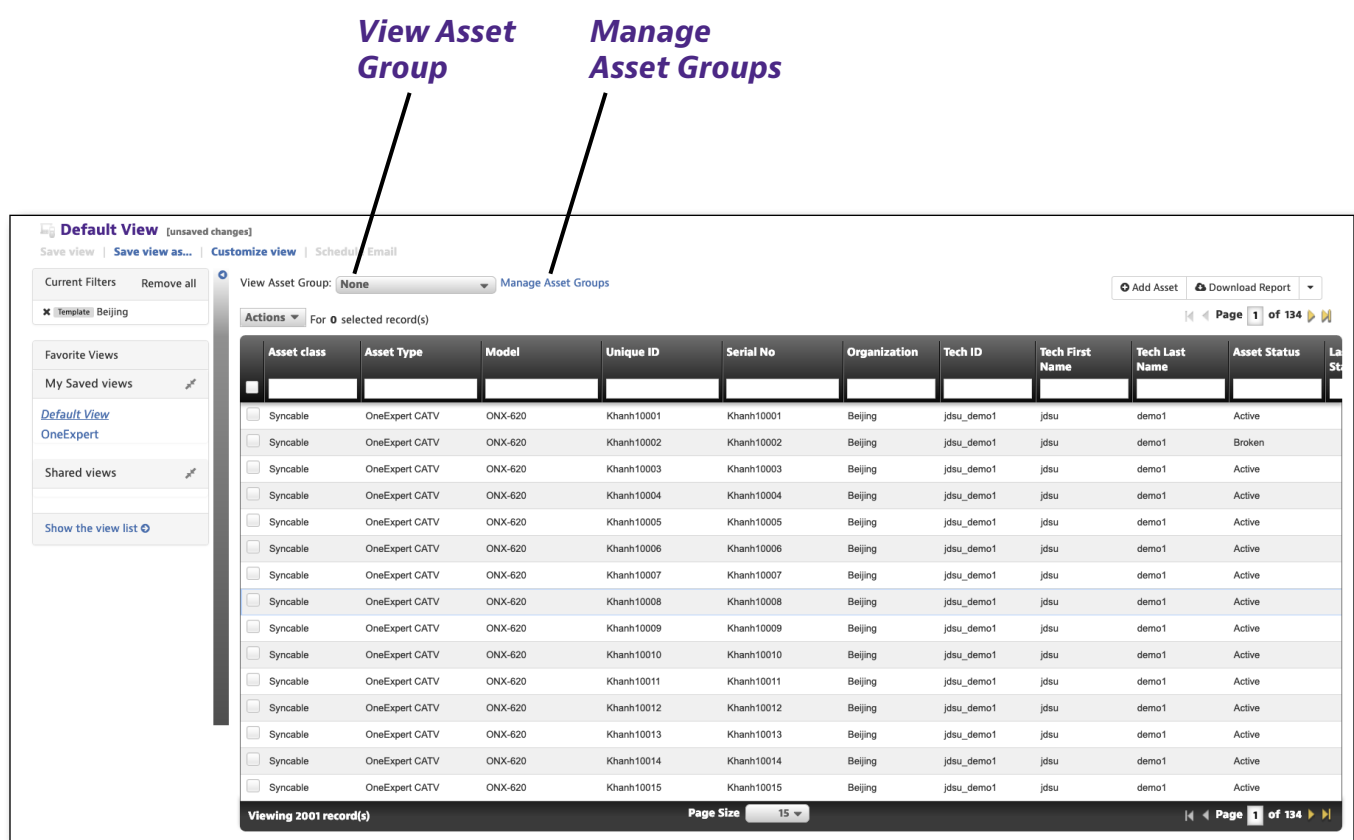
<input type="checkbox"/>	Asset No	Serial No	SW Version	HW Version	Tech Id	Tech First Name	Tech Last Name
<input checked="" type="checkbox"/>		9220608	SSTest	B4-4-3-2-1	Greg Massey	DSAM	DVT

Viewing 1 records | Page 1 of 1

Back Next Cancel

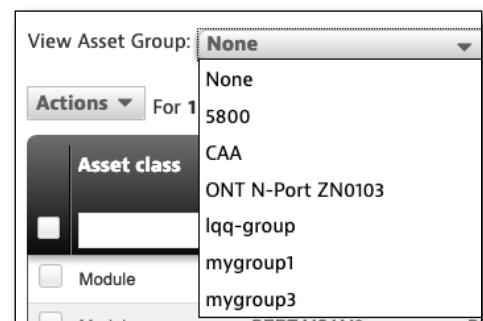
Managing asset groups

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.



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.



Asset group management

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

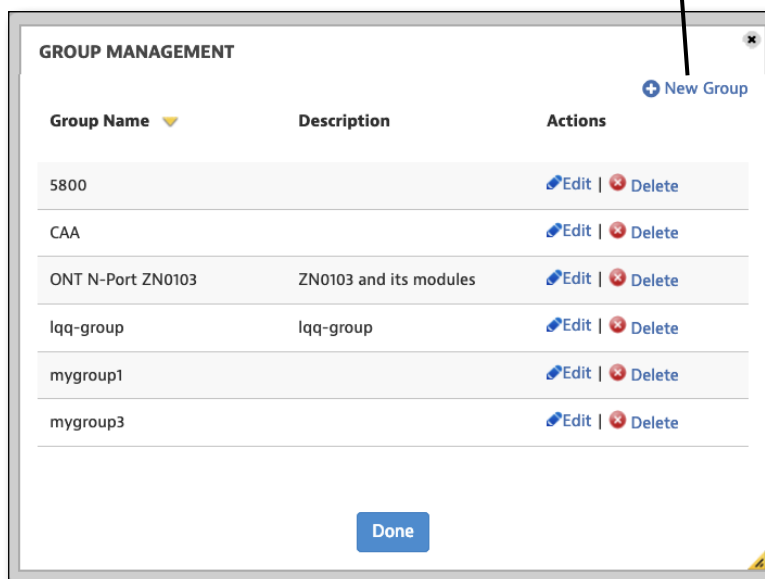
Adding new groups

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.

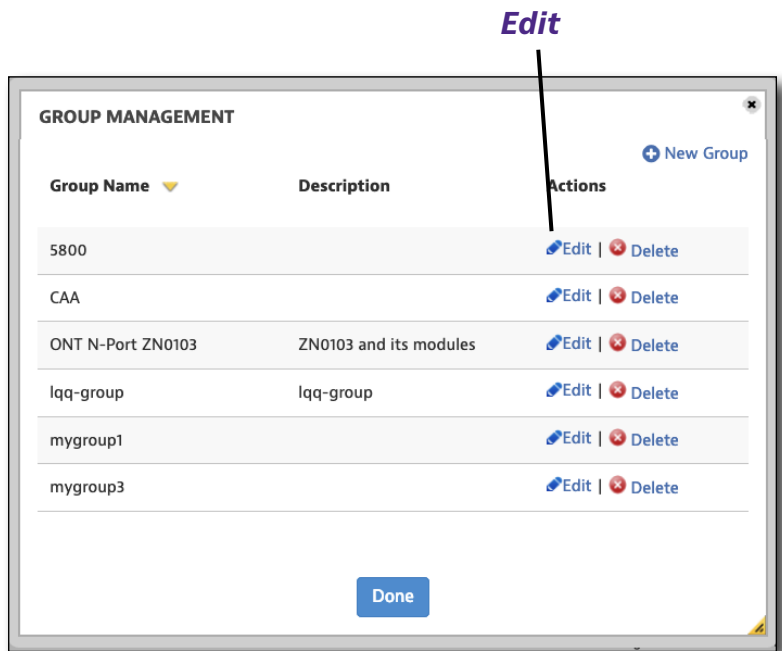
New Group



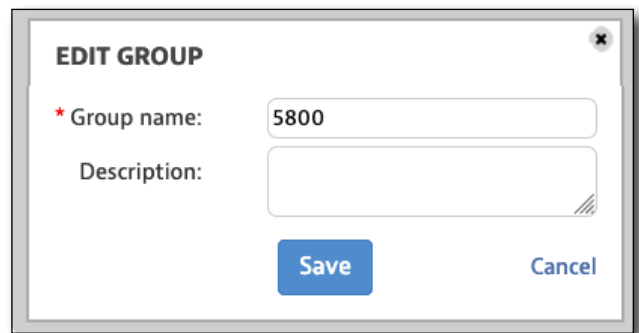
The screenshot shows the 'CREATE A NEW GROUP' dialog box. It has two input fields: 'Group name' and 'Description'. The 'Group name' field contains the text 'B Group East'. Below the input fields are two buttons: 'Save' and 'Cancel'.

Editing groups

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

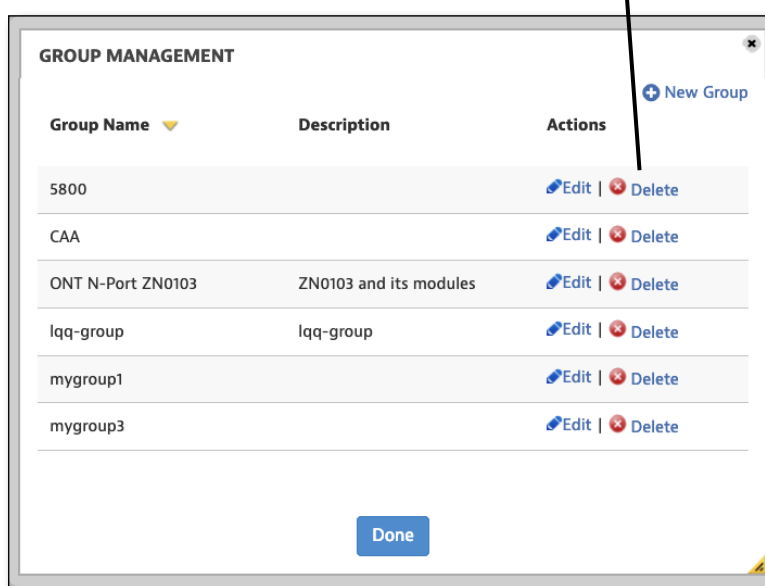


Edit the information as needed, and click **Save**.

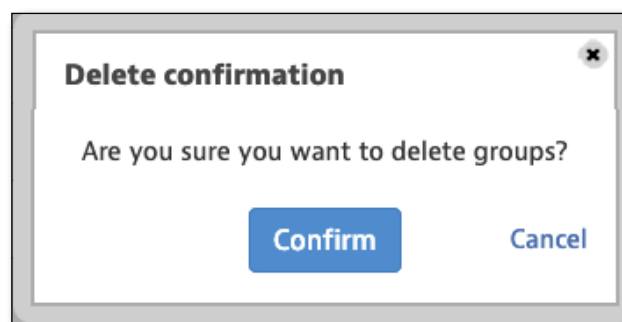


Deleting groups

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



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



Test Data

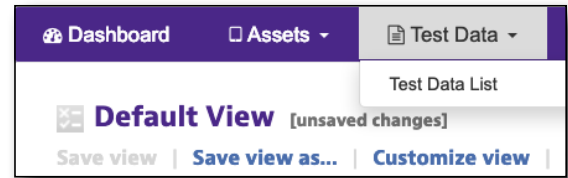
This chapter covers how to use the Test Data Management features of StrataSync, including the following:

- "Test Data" on page 168
- "Searching and sorting" on page 169
- "Views" on page 172
- "Test Data List" on page 175

Test Data

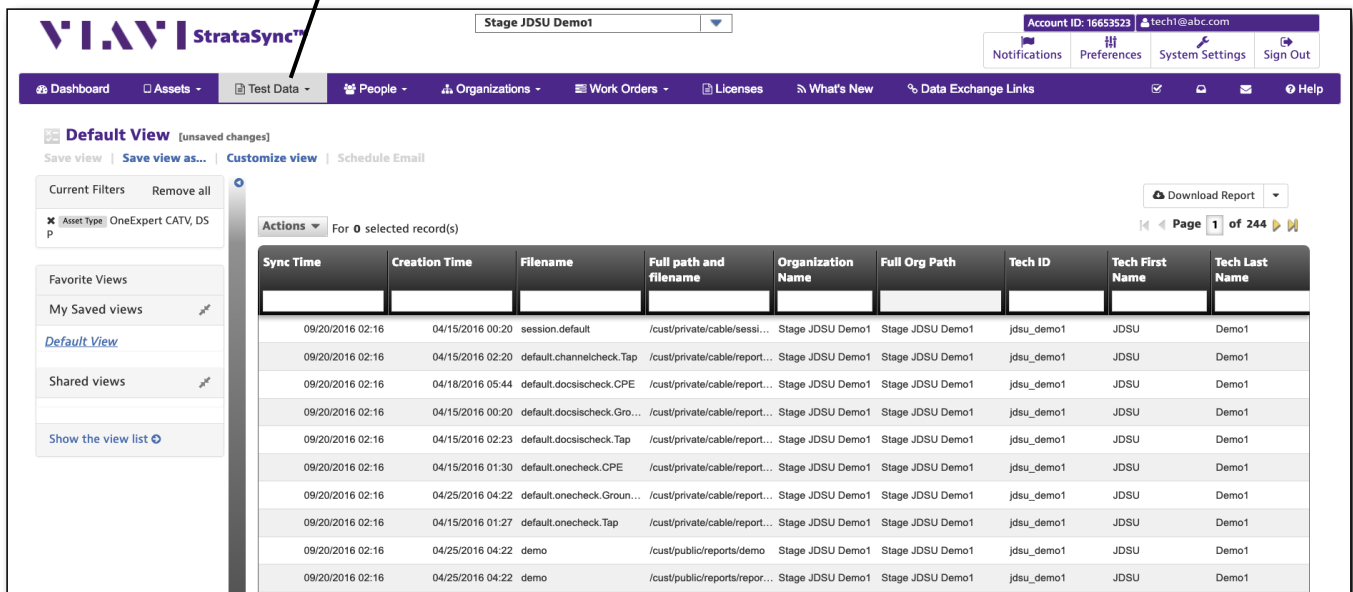
The **Test Data** tab is the hub for all of the test data uploaded from your field instruments to your StrataSync account.

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

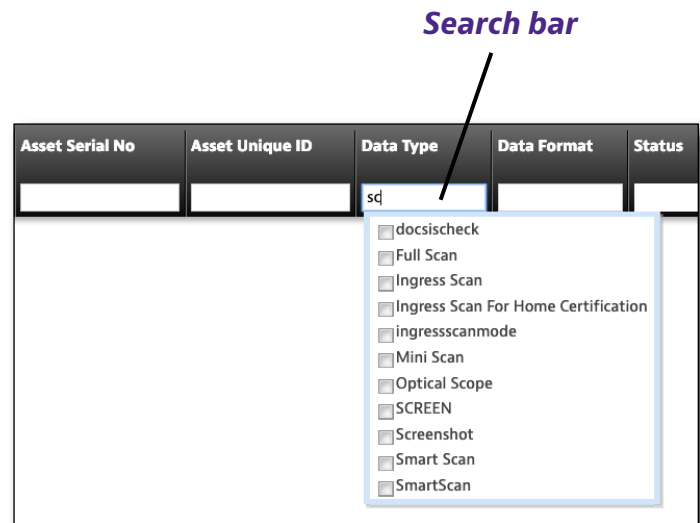
From the Test Data List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

Searching

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

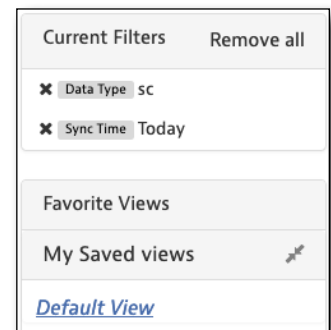
Some of the columns provide dropdowns with relevant options once you start typing.

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.



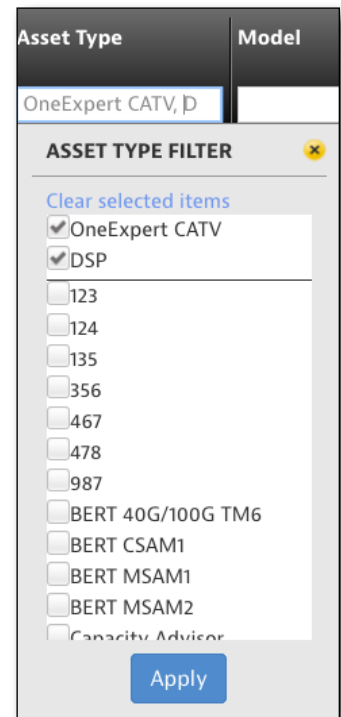
Asset Unique ID	Data Type	Data Format	Status	Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
T-BERD 2000_2805	TESTDATA.OTDR	application/octet-st...	None	10/09/2013 09:45	03/19/2013 11:45	khani10000002.scr	/useridsku/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.OTDR	application/octet-st...	None	10/09/2013 09:45	07/02/2013 07:21	khani10000003.scr	/useridsku/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_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/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	03/19/2013 11:45	khani10000001.scr.pdf	/useridsku/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	03/19/2013 11:45	khani10000002.scr.pdf	/useridsku/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
T-BERD 2000_2805	TESTDATA.PDF R...	application/pdf	None	10/09/2013 09:45	07/02/2013 07:21	khani10000003.scr.pdf	/useridsku/StrataSynch...	Stage JDSU Demo1	Stage JDSU Demo1	khani_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	khani_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	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	12/04/2012 09:11	khani-bt.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/06/2013 04:37	khani001.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	03/07/2013 04:50	khani002.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/plain	None	10/09/2013 09:55	01/19/2013 07:03	khani_20130119-03.txt	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/csv	None	10/09/2013 09:55	12/04/2012 09:11	khani-pdf.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/csv	None	10/09/2013 09:55	03/06/2013 04:37	khani001.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_r2	Khanih	Ngo
MTS5800_WMDF01346...	TESTDATA	text/csv	None	10/09/2013 09:55	03/07/2013 04:50	khani002.csv	/acterna/storage/berfus...	Stage JDSU Demo1	Stage JDSU Demo1	khani_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:

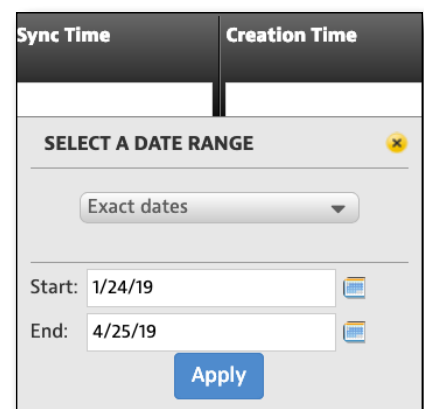


Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.

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 173](#).

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.

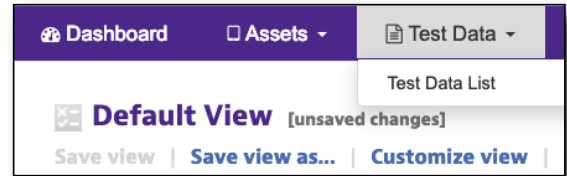


Views

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.

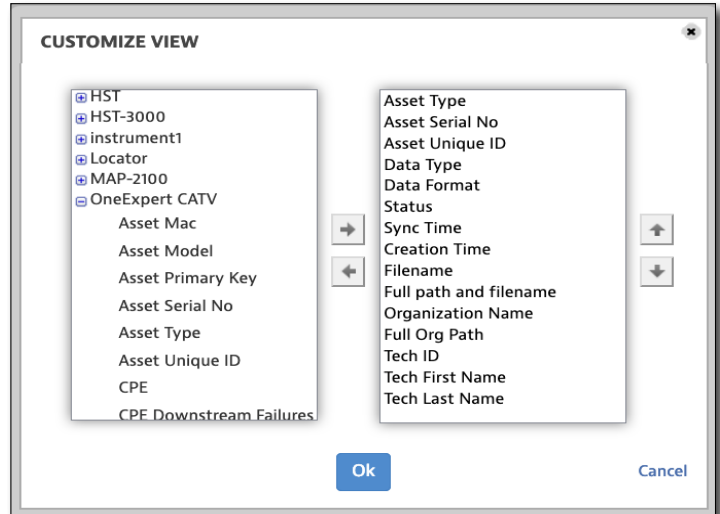


Save view As Customize view

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

Test Data List Default View

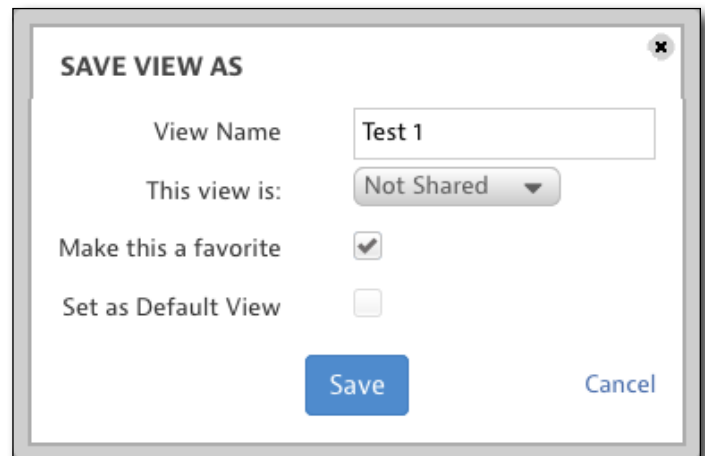
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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

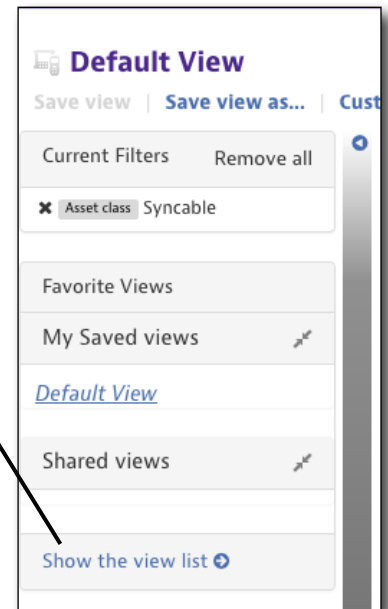
The new view is listed under the Favorite Views section on the left.



Sharing and editing views

- 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



- Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
- 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"/>	Rename Delete
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.

The screenshot shows the StrataSync™ Test Data List interface. The top navigation bar includes 'Dashboard', 'Assets', 'Test Data', 'People', 'Organizations', 'Work Orders', 'Licenses', 'What's New', and 'Data Exchange Links'. The 'Test Data' section is active, showing a 'Default View' with 'unsaved changes'. The table displays test data records 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. A 'Download Report' button is located in the top right of the table area.

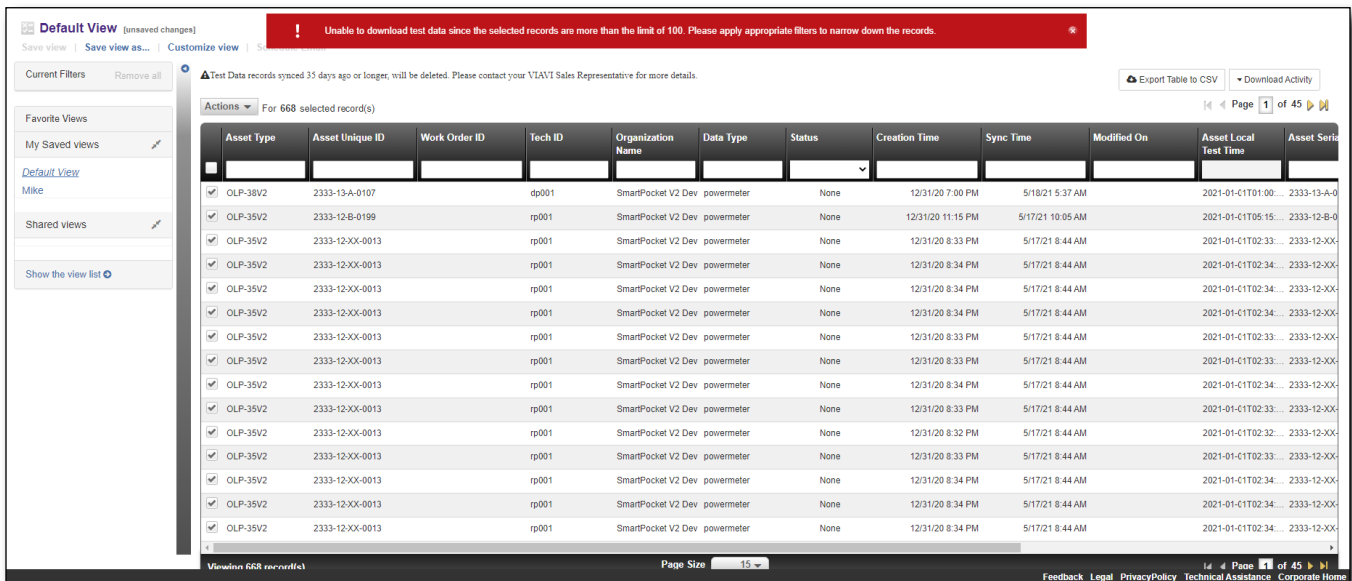
Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
09/20/2016 02:16	04/15/2016 00:20	session.default	/cust/private/cable/sessi...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 02:20	default.channelcheck.Tap	/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

The screenshot shows a pop-up dialog box with the title "For supported test types do you want HTML Report or raw file". It contains two radio buttons: "Raw File" (selected) and "HTML Report". Below the radio buttons are "Download" and "Cancel" buttons.

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.

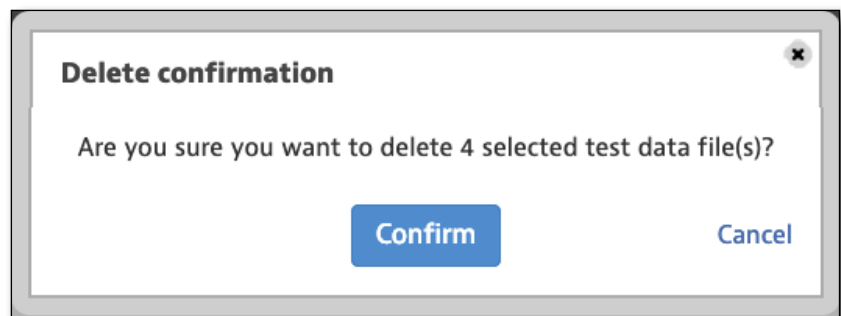


Deleting test data

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**.



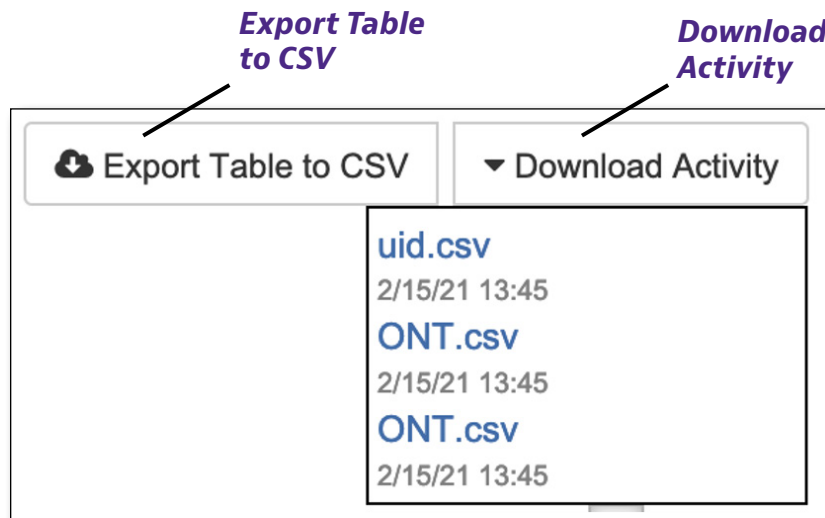
Exporting lists to CSV

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] | Save view | Save view as... | Customize view | S

! 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

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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

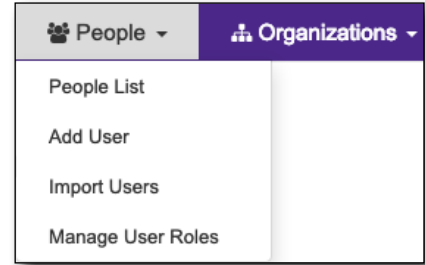
This chapter covers how to use the People Management features of StrataSync, including the following:

- "People" on page 180
- "Searching and sorting" on page 181
- "Views" on page 184
- "People List" on page 187
- "Adding a user" on page 195
- "Importing users" on page 202
- "Managing user roles" on page 203

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

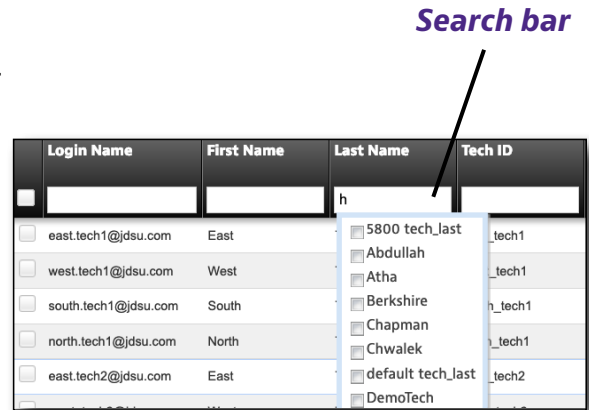
Searching and sorting

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

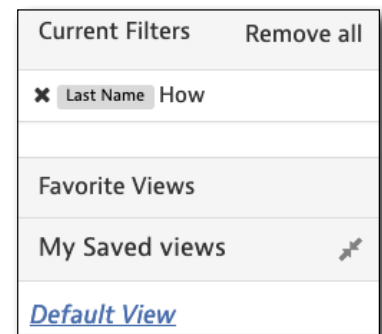
Searching

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.



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

Default View [unsaved changes]
 Save view | Save view as... | Customize view | Schedule Email

Current Filters Remove all

Favorite Views

My Saved views

Default View

Shared views

Show the view list

Actions For 0 selected record(s)

Add User Download Report

Page 1 of 28

Organization	Full Org Path	Manager Login Name	Manager First Name	Manager Last Name	Number of assets	Mobile Phone	Login Enabled	Last Login Date
Stage JDSU Demo1	Stage JDSU Demo1	jdsu.demo1@jdsu.com	JDSU	Demo1	30		Yes	02/06/2019
South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	12/01/2017
North Region	Stage JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	0		Yes	
West Region	Stage JDSU Demo1.We...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
East Region	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
East Reg1	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	05/18/2016
West Region	Stage JDSU Demo1.We...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
North Region	Stage JDSU Demo1.Nor...	north.manager@jdsu.com	North	Manager	1		Yes	
East Reg1 SubReg1	Stage JDSU Demo1.Eas...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	
West Region	Stage JDSU Demo1.We...	jdsu.demo1@jdsu.com	JDSU	Demo1	1		Yes	
South Region	Stage JDSU Demo1.Nor...	jdsu.demo1@jdsu.com	JDSU	Demo1	0		Yes	

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

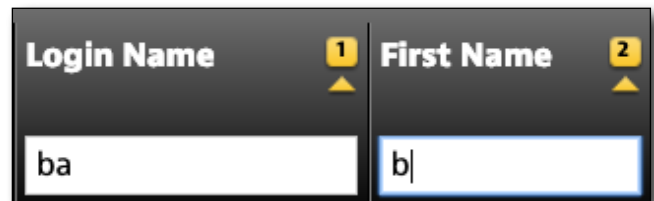
**NOTE:**

You can save custom filters to a favorite view for easy reference. See *"Saving views"* on page 185.

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.

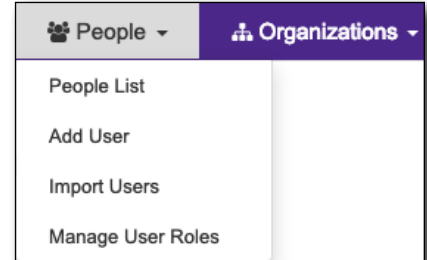


Views

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.

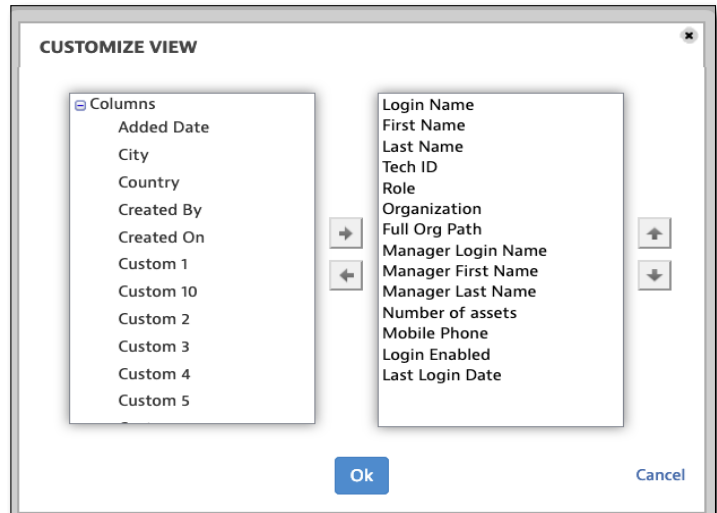


Save view as **Customize view**

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 Lo 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

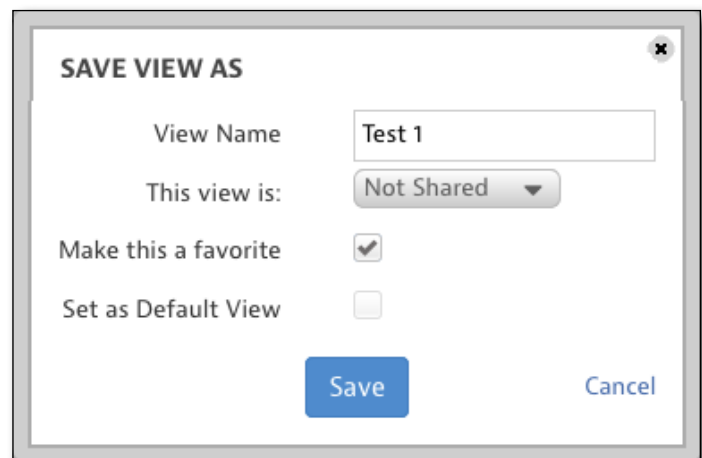
- In the left column, you will see the items to include in your view. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



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**.

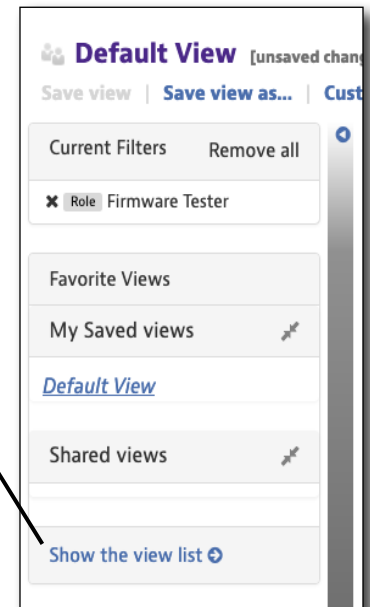
The new view is listed under the Favorite Views section on the left.



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"/>	Rename Delete
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

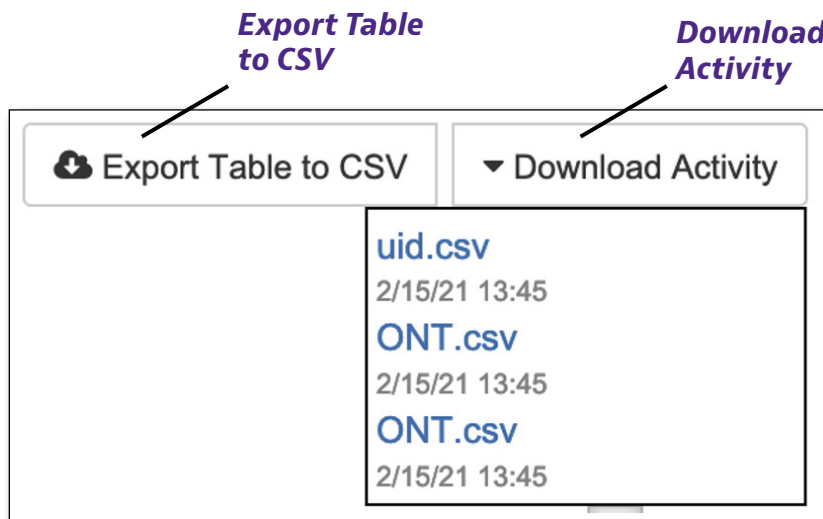
Exporting lists to CSV

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.

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

People List > east.tech1@jdsu.com

East Tech1 - East.Tech1@jdsu.com

[Save](#)

User Information

Username: east.tech1@jdsu.com

* Email:

* First Name:

* Last Name:

Unique ID: 8202

* Employee/Tech ID:

Contact Information

Mobile Phone:

Office Phone:

Street Address:

City:

State:

Postal Code:

Country:

Access and Visibility

Login Enabled:

Visibility Organization:

Organization:

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

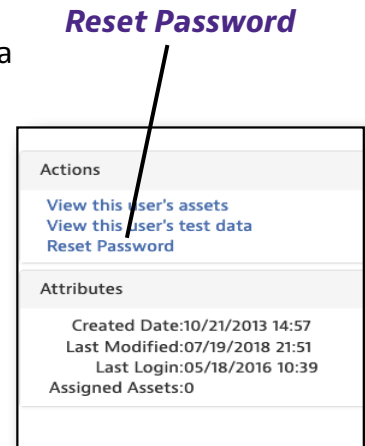
Created Date:10/21/2013 14:57
 Last Modified:07/19/2018 21:51
 Last Login:05/18/2016 10:39
 Assigned Assets:0

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.



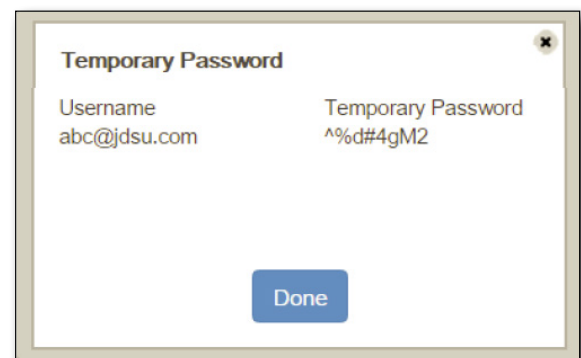
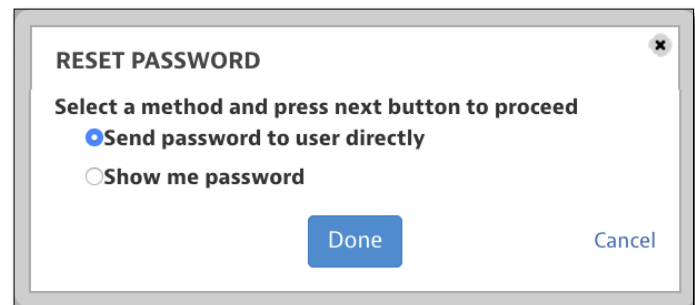
From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.

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

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

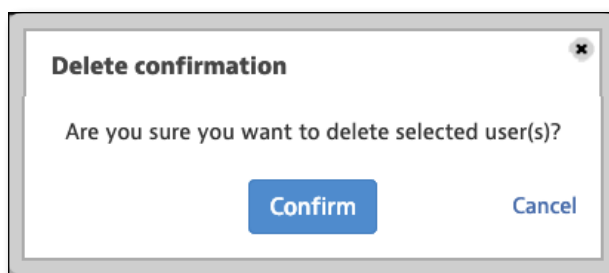
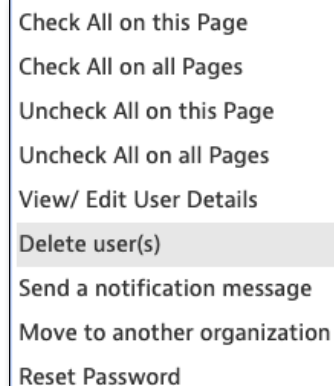
You can also change your password through Preferences. See ["Configuration" on page 271](#)

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.

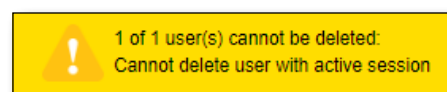
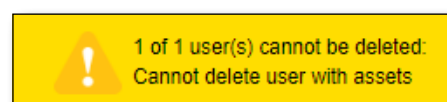
StrataSync will not delete users under the following conditions:

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

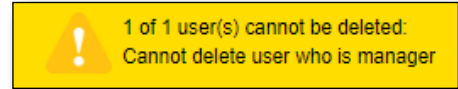
This issue is resolved by reassigning the assets to another StrataSync user.

- 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.

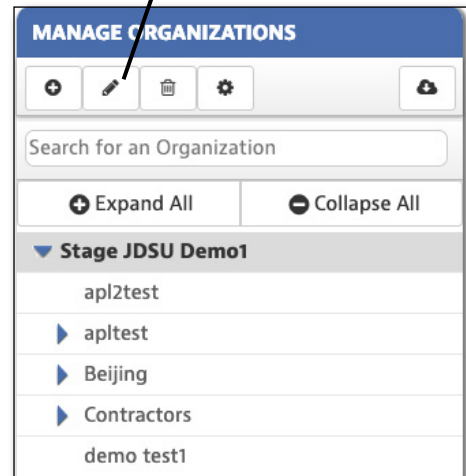
Login Name	First Name	Last Name	Tech ID	Role	Organization	Full Org Path	Manager Login Name
<input type="checkbox"/>							earl.pope@stagedemo.com
<input type="checkbox"/> bud.pope@stagedemo.c...	Earl	Pope	bp001	Firmware User	Earl Test	Stage JDSU Demo1.Earl...	earl.pope@stagedemo.com
<input type="checkbox"/> 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 roles" on page 206* for more detail.



Edit Organization

* Organization Name:

* Manager Tech ID:

* Manager First Name:

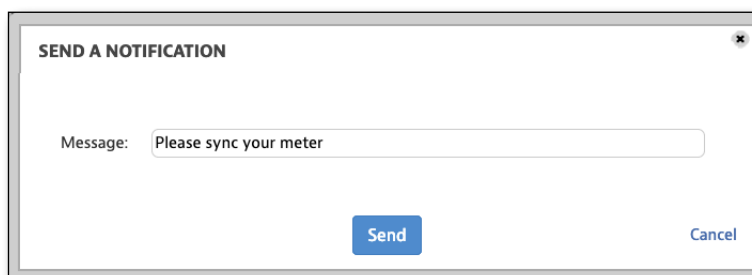
* Manager Last Name:

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**.



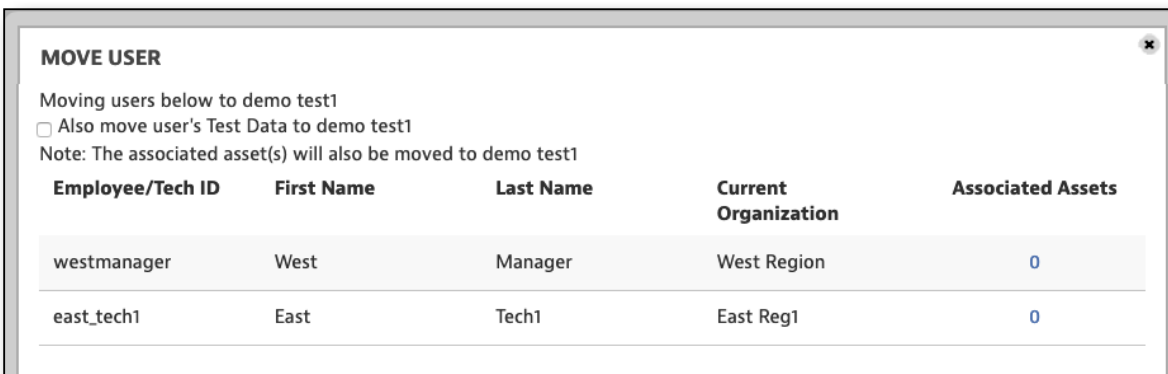
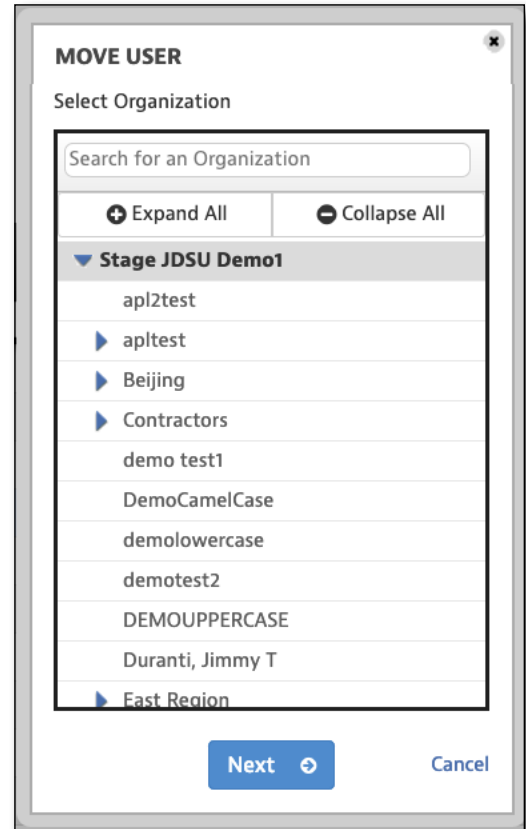
Moving a user

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.

StrataSync will not move users with Additional Visibilities. To move the user, the additional visibilities must be deleted. After the user is moved, the additional visibilities can be added back, if necessary. See ["Adding additional visibility" on page 198](#).

Users that have been assigned the manager of an organization in the **Organization** tab will not move if the organization they are assigned as manager is "outside" the visibility of the organization they are being moved to.



Resetting passwords

Resetting a user's password is similar to the steps covered previously. See ["Reset Password" on page 190](#).

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. See ["Managing user roles" on page 203](#).
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. See ["Setting access and visibility" on page 197](#).
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.

In StrataSync, permissions control what a user can do, and visibilities control where the user has access and can take actions based on their permissions.

Keep in mind, all permissions granted to a user are extended to their visibility level.

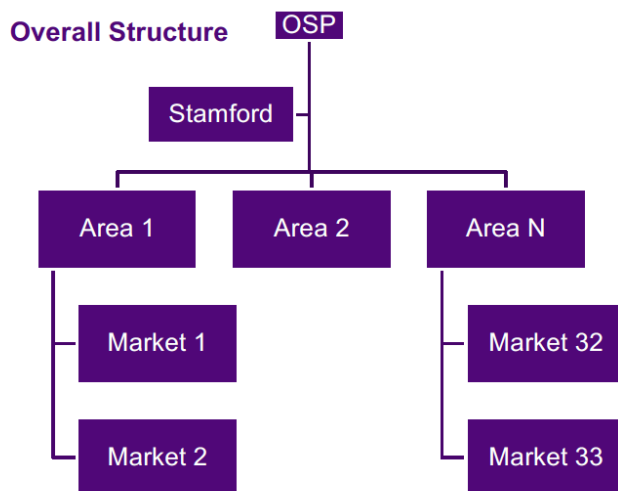
Changing the visibility

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

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 194](#).

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

Search for an Organization

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

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

Visibility Organization	Landing Site	Role	Actions
Indiana	Administrator Site	Firmware Tester	Edit Delete
Circet	Administrator Site	Manager 4	Edit Delete

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.

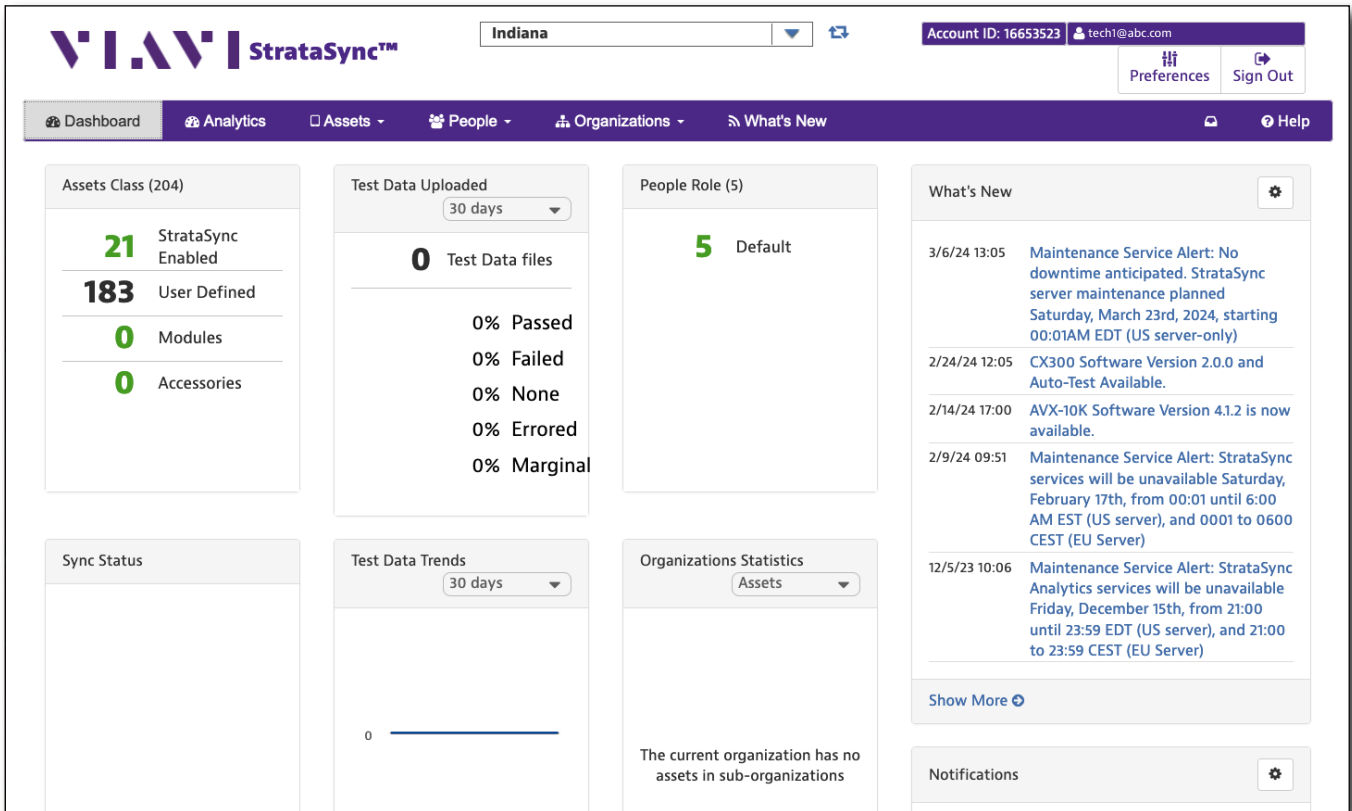
Choose the visibility organization and click **Apply**. StrataSync will refresh and show the details and data for that organization and its suborganizations only.

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. See *"Managing user roles" on page 203*.

When done, click **Save**.

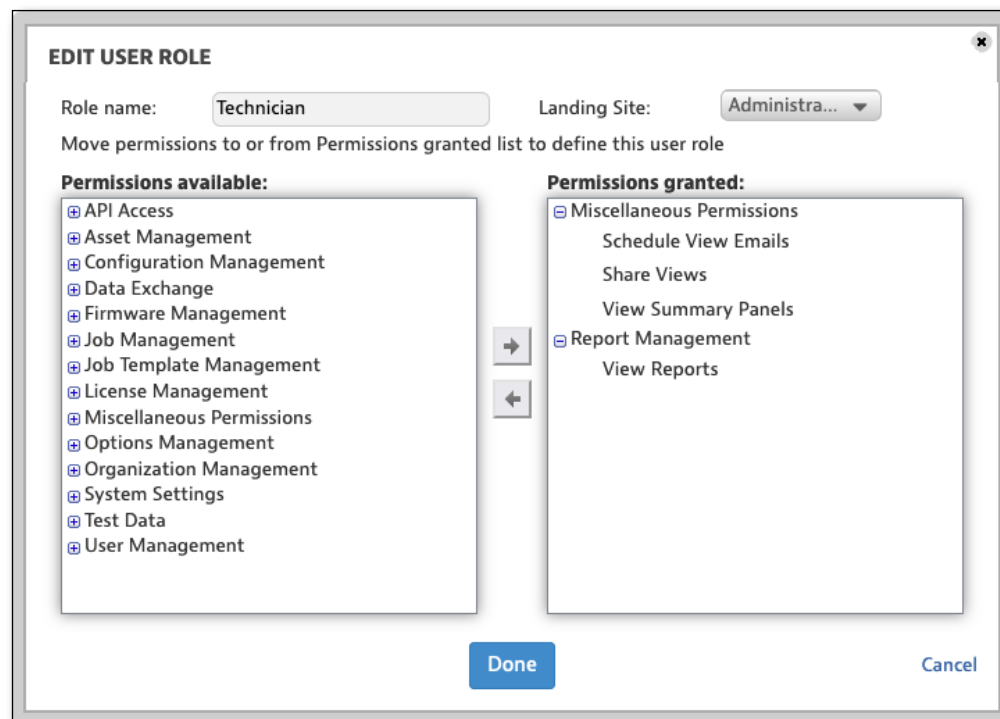
Adding additional permissions

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

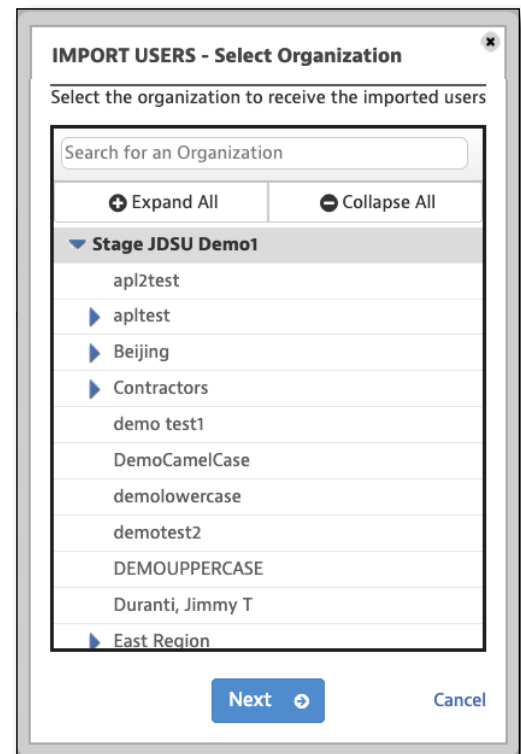
This section details how to import multiple users from a CSV file.

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.

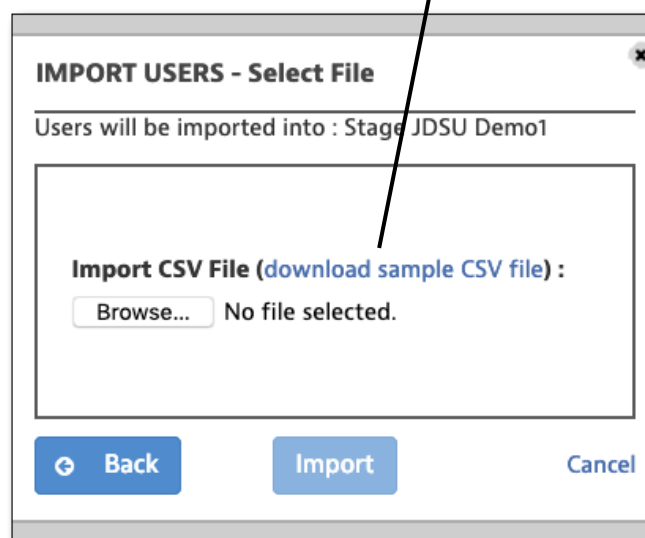


Importing changes for users

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.

Download sample CSV



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.

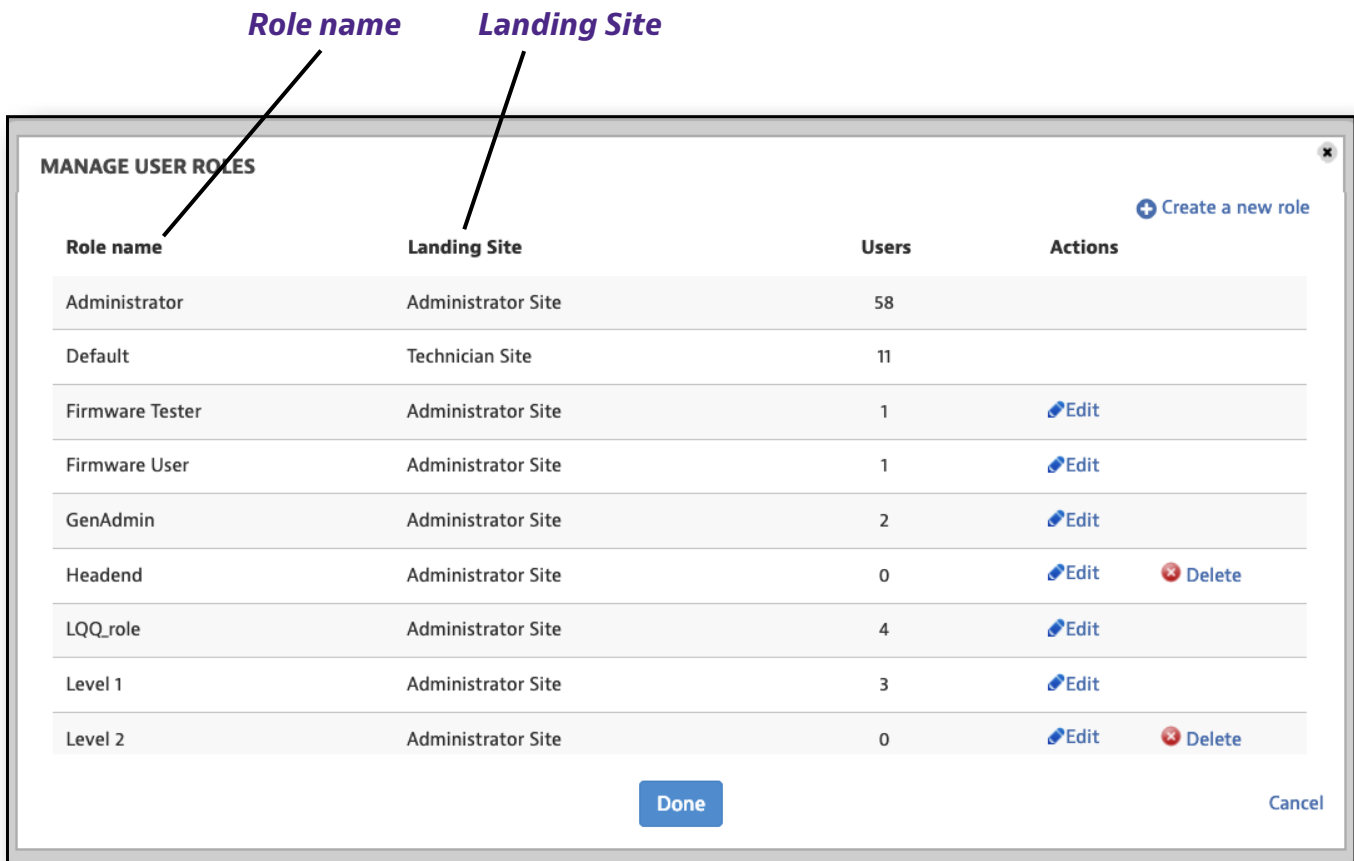
Roles and Landing Sites

All StrataSync accounts are created with two roles: **Administrator** for the Administrator Landing Site and **Default** for the Technician Landing Site. Landing sites are views or dashboards for each separate role.

The **Administrator** role includes all available StrataSync permissions.

The **Default** role includes the following StrataSync permissions: **Update Firmware, View Assets, Assign Options, Manage Floating Options**, and **View Options**.

Additional roles should be created as needed to support the needs of various StrataSync users and to strictly limit access to certain StrataSync features, such as System Settings.



The screenshot shows a window titled "MANAGE USER ROLES" with a table of user roles. Annotations with arrows point to the "Role name" and "Landing Site" columns. The table includes columns for "Role name", "Landing Site", "Users", and "Actions".

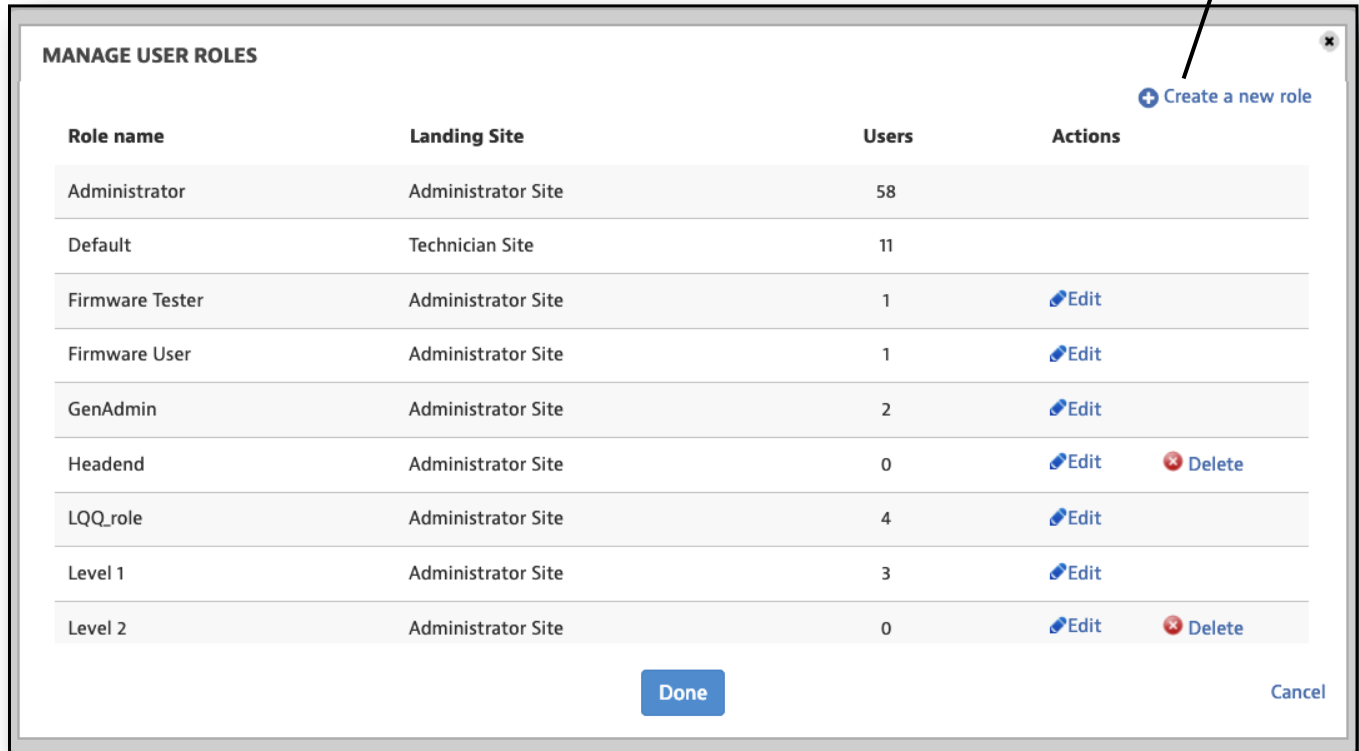
Role name	Landing Site	Users	Actions
Administrator	Administrator Site	58	
Default	Technician Site	11	
Firmware Tester	Administrator Site	1	Edit
Firmware User	Administrator Site	1	Edit
GenAdmin	Administrator Site	2	Edit
Headend	Administrator Site	0	Edit Delete
LQQ_role	Administrator Site	4	Edit
Level 1	Administrator Site	3	Edit
Level 2	Administrator Site	0	Edit Delete

Buttons: [+ Create a new role](#), [Done](#), [Cancel](#)

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



The screenshot shows a window titled "MANAGE USER ROLES" with a close button in the top right corner. In the top right area of the window, there is a blue button with a plus icon and the text "Create a new role". A purple callout arrow points from the text "Create a new role" above the window to this button. Below the button is a table with the following data:

Role name	Landing Site	Users	Actions
Administrator	Administrator Site	58	
Default	Technician Site	11	
Firmware Tester	Administrator Site	1	Edit
Firmware User	Administrator Site	1	Edit
GenAdmin	Administrator Site	2	Edit
Headend	Administrator Site	0	Edit Delete
LQQ_role	Administrator Site	4	Edit
Level 1	Administrator Site	3	Edit
Level 2	Administrator Site	0	Edit Delete

At the bottom of the window, there is a blue "Done" button and a "Cancel" link.

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

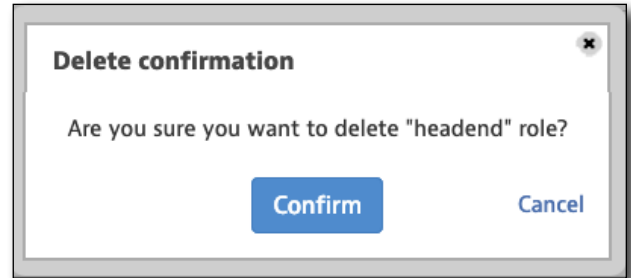
From the Manage User Roles screen, click **Edit** to update user roles.

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 279](#) 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.

*** 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.

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

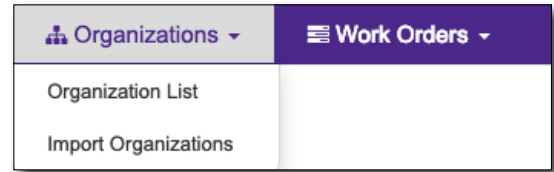
This chapter covers how to use the Organization Management features of StrataSync, including the following:

- "Organizations" on page 216
- "Searching and sorting" on page 217
- "Organization List" on page 220
- "Importing organizations" on page 232

Organizations

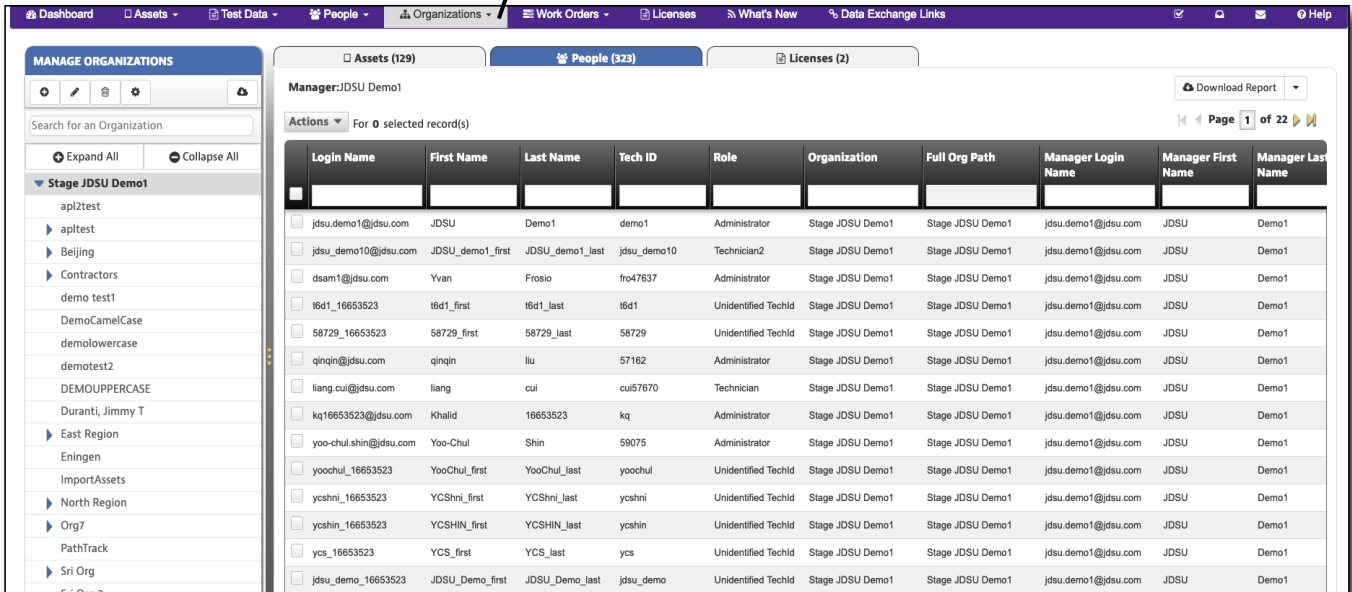
The **Organizations** tab is the hub for all of the organization and suborganization management features of your StrataSync account, including: adding, editing, moving, deleting, and importing organizations.

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

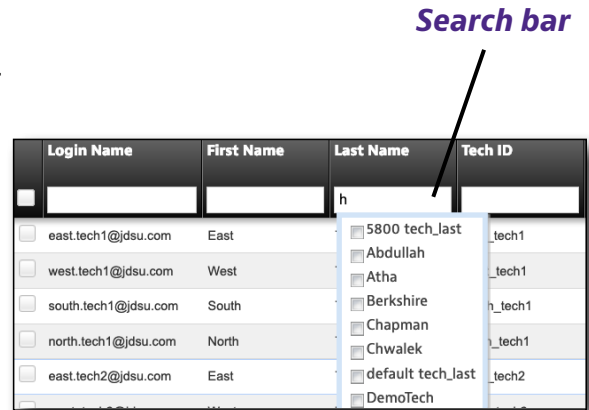
Searching and sorting

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.

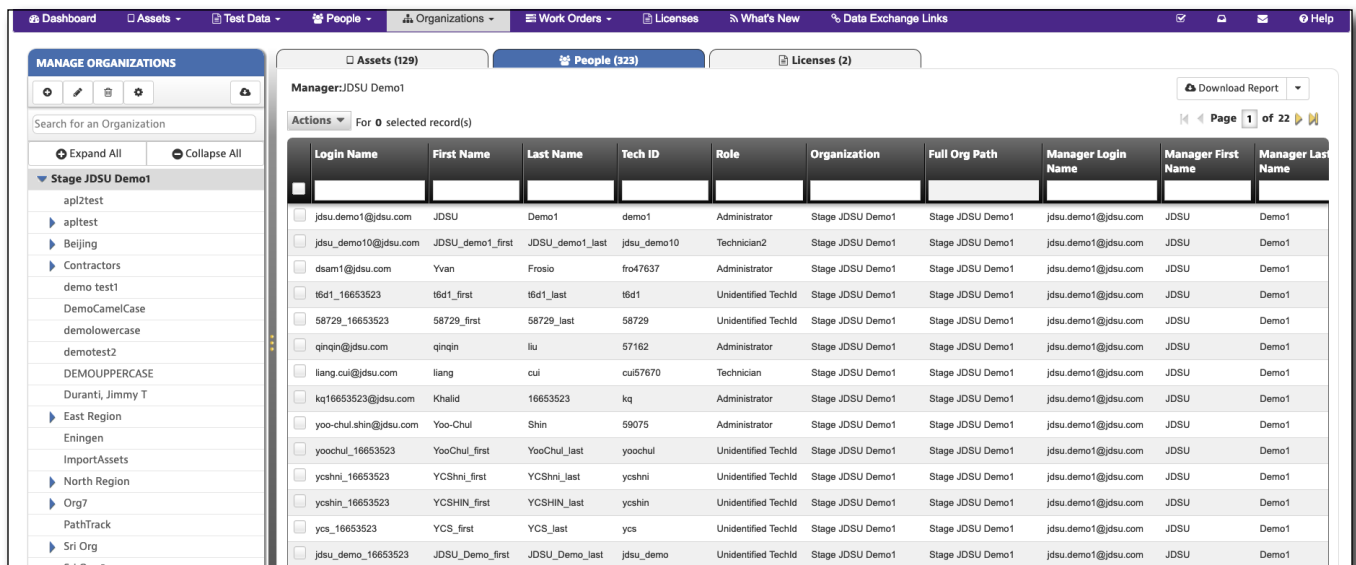
Searching

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.



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.

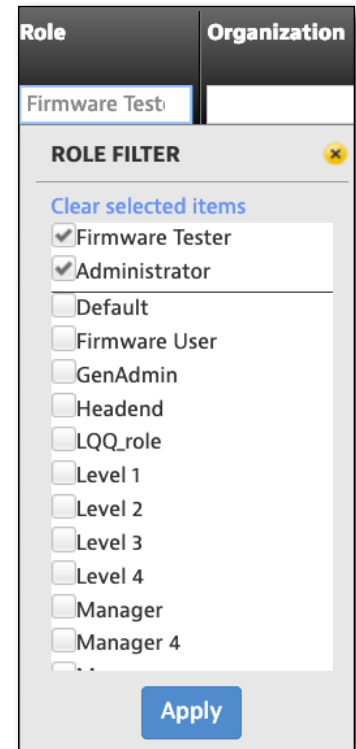


Scroll to the right to reveal more detail, including Manager's Name and Last Login Date.

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:

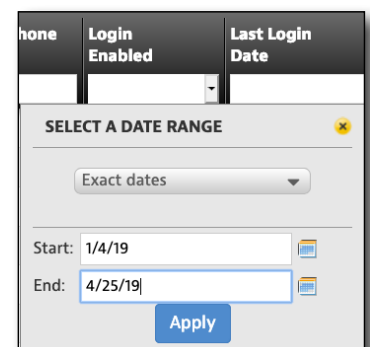


Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.

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.

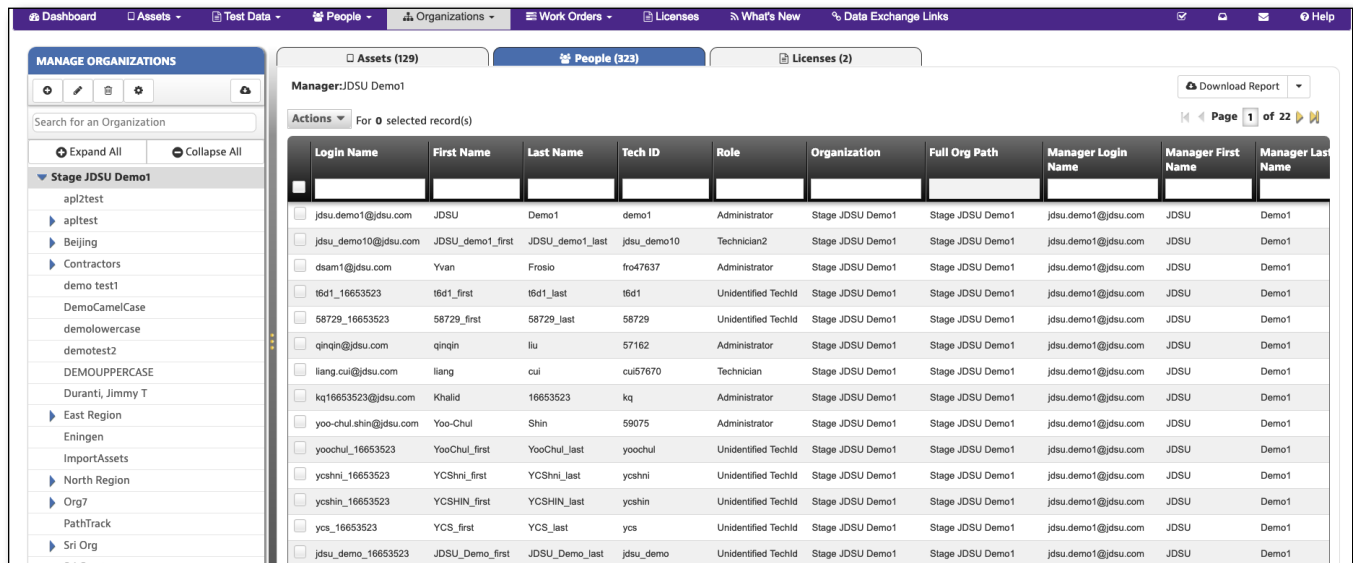


Organization List

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

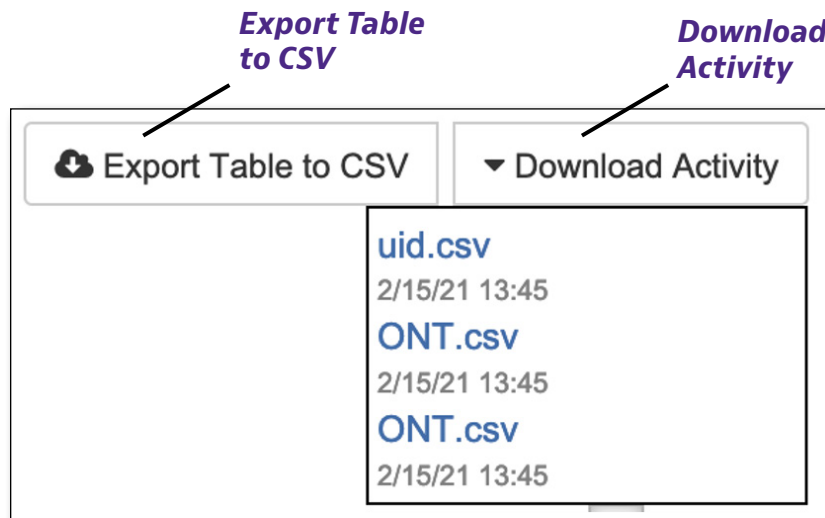
Exporting lists to CSV

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

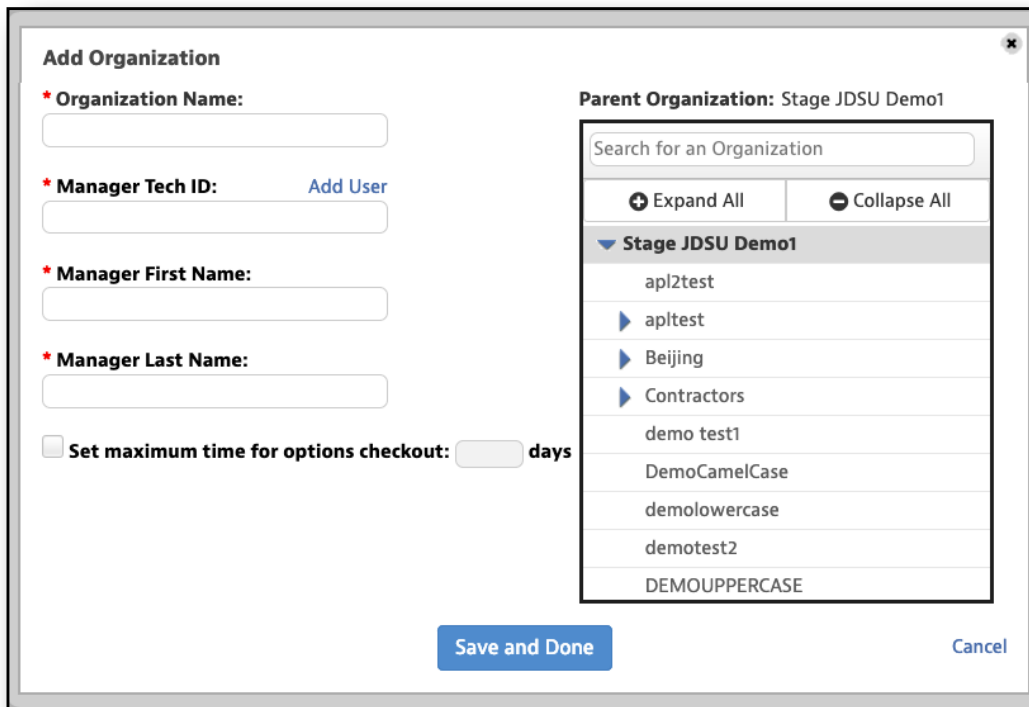
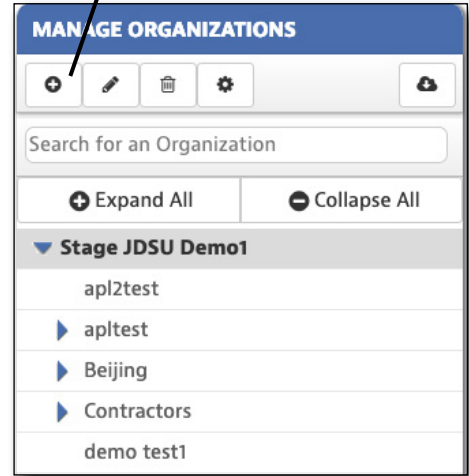
From the Organization List screen, select the **Add** button at the top of the **Manage Organizations** tab. The Add Organization screen is displayed.

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

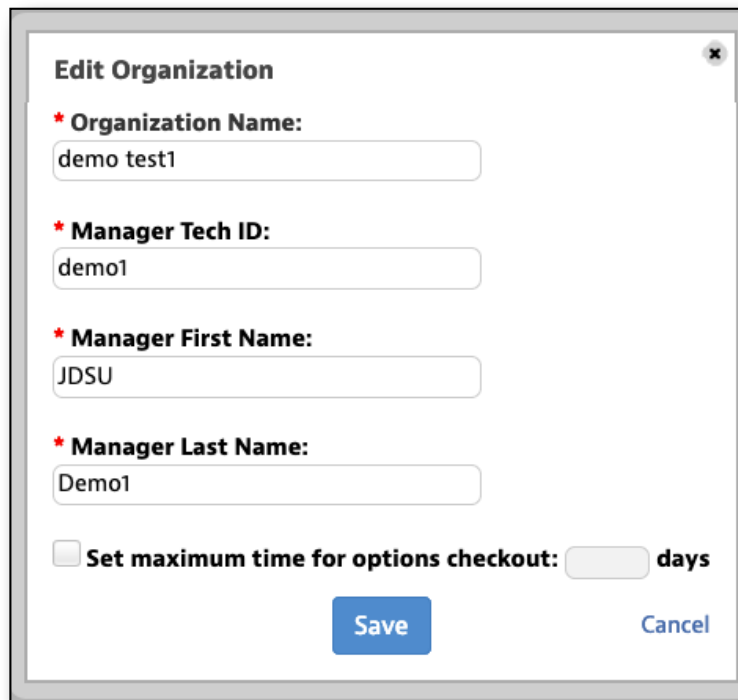
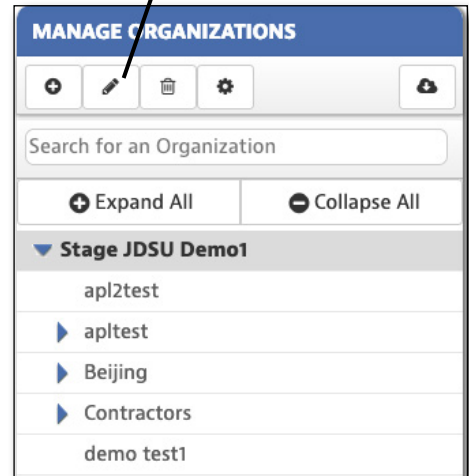


Editing organizations

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



The 'Edit Organization' dialog box contains the following fields and options:

- * Organization Name:** demo test1
- * Manager Tech ID:** demo1
- * Manager First Name:** JDSU
- * Manager Last Name:** Demo1
- Set maximum time for options checkout:** [] days

Buttons: Save, Cancel

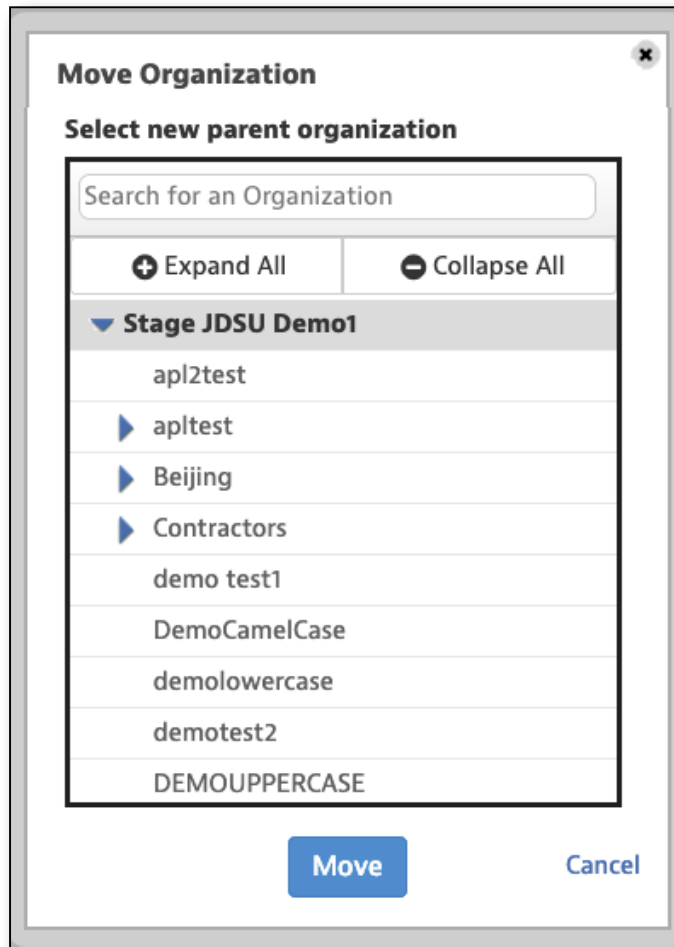
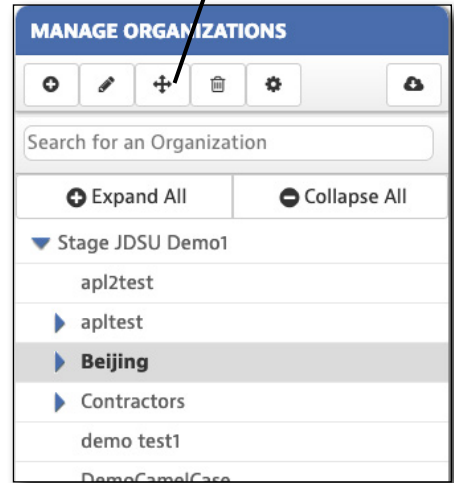
Moving organizations

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**.

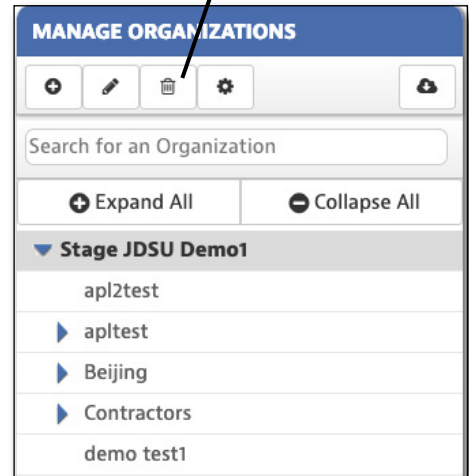
Move Organization



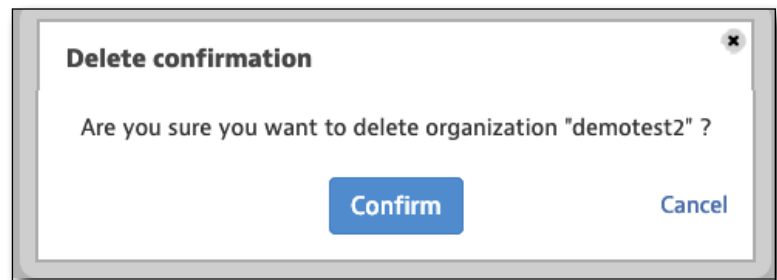
Deleting organizations

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, test data, software option pools, and templates must be deleted or moved to other organizations.

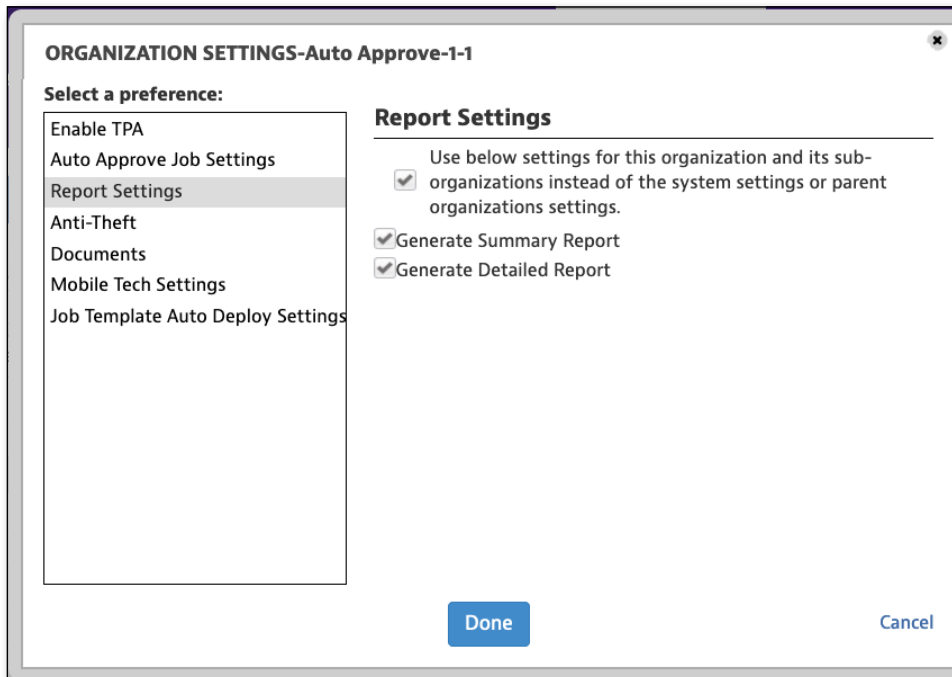
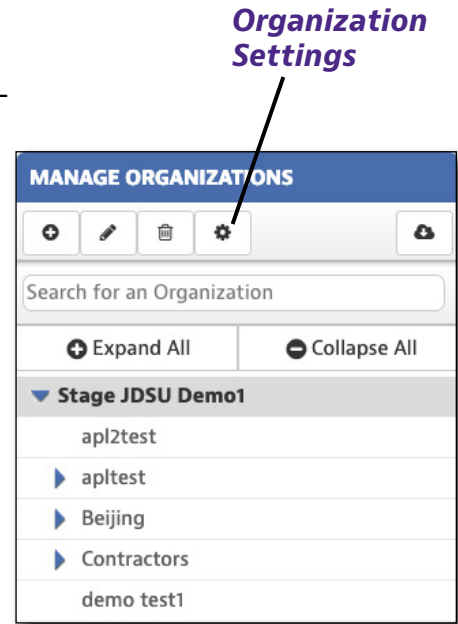
Organization settings

This feature allows you to customize your settings for Test Process Automation, reports, job auto approve, anti-theft, documents, template auto deploy, Mobile Tech, and job template auto deploy.


This allows you to tailor these settings by organization 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**.



IMPORTANT:



The parent organization uses system-wide settings. To adjust settings per organization, select another organization or sub-org below the parent organization.

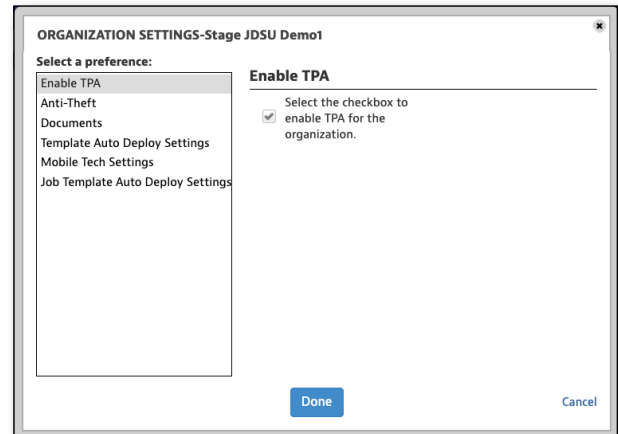
Enable Test Process Automation (TPA)

This feature allows you to set Test Process Automation at the organization level to enable TPA at that org (and any orgs underneath it in the hierarchy).

This should only be enabled when there are TPA-compatible instruments in that org, and more importantly, you are not assigning existing CDM 2.1 or cable work orders to techs in that org, or deploying old job templates to existing assets.

Important: Admin users associated with an organization at a higher level than a sub-organization where TPA is enabled, will not see the TPA sub-menu from the existing StrataSync web UI to access the new TPA UI.

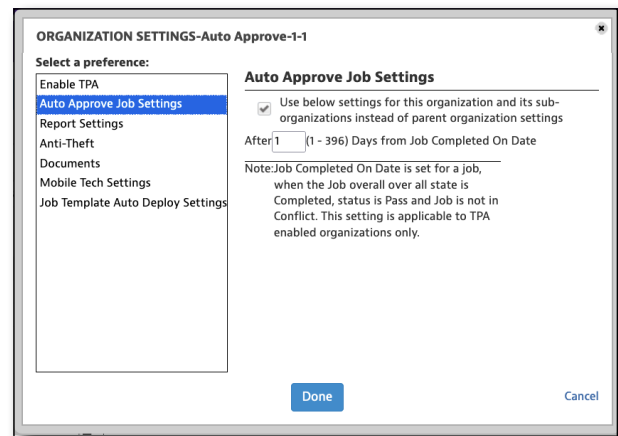
Create a new user profile associated with the TPA-enabled organization and login with this profile to access the new TPA UI. See ["Adding a user" on page 195](#).



Auto approve job settings

This feature allows you to set Auto Job Approval Settings at the organization level to enable approval at that org (and any orgs underneath it in the hierarchy) after a set number of days. By default, auto-approval of jobs is disabled.

Note: Job Completed On Date is set for a job, when the Job overall state is Completed, status is Pass, and Job is not in Conflict. This setting is applicable to TPA enabled organizations only.



Please note that the StrataSync account must be licensed for SS-PRO or higher.

Select **Use below settings for this organization and its sub-organization...** at the per-organization level, to override any settings at a higher-level organization, then configure the settings.

When finished, click **Done**.

For system-wide settings, see ["Auto approve job settings" on page 294](#).

Report settings

This feature allows you to set Reports Settings at the organization level to generate reports at that org (and any orgs underneath it in the hierarchy) after TPA jobs are approved. By default, reporting is disabled.

When TPA jobs are approved (either manually or via auto-approval), StrataSync can generate a Summary and/or a Detailed PDF report.

The Summary PDF report currently supports the JSON REPORT.FComp PRO test type (reports are effectively empty for jobs with other test types), and summarizes key metrics across all FiberComplete PRO test results associated with the approved job.

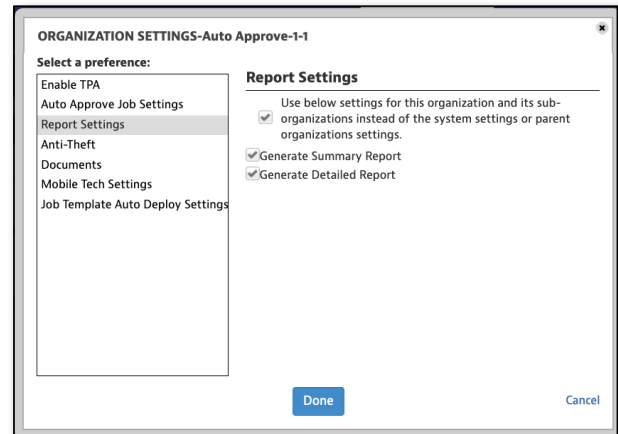
The Detailed PDF report concatenates any test results uploaded from VIAVI test instruments associated with the approved job which are PDF-formatted. Test results in other formats are not included.

Please note that the StrataSync account must be licensed for SS-PRO or higher.

Select **Use below settings for this organization and its sub-organization...** at the per-organization level, to override any settings at a higher-level organization, then configure the settings.

When finished, click **Done**.

For system-wide settings, see ["Report settings" on page 295](#).

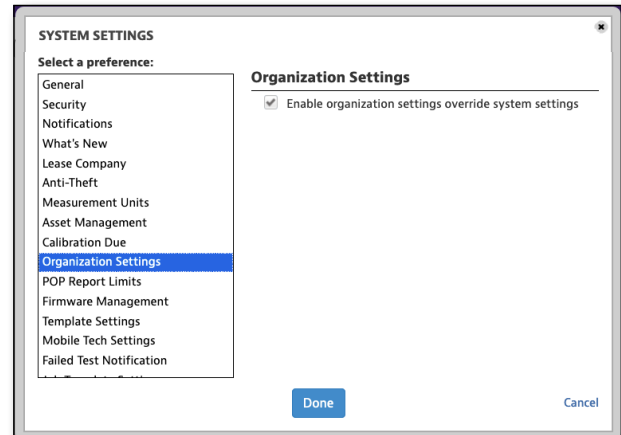


Mobile Tech settings and custom documents

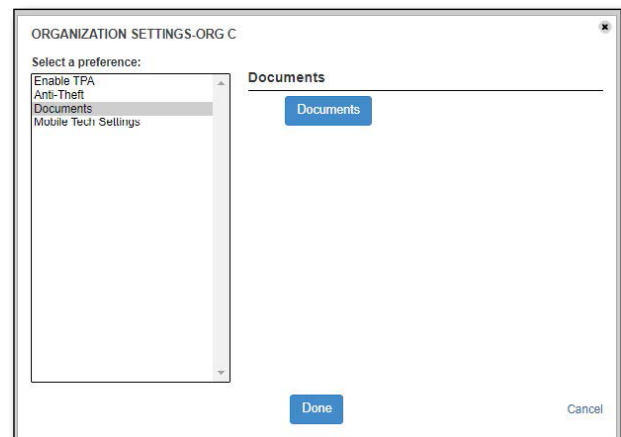
Previously, StrataSync licensed accounts could define centralized settings to control VIAVI Mobile Tech app configuration for thousands of technicians, as well as contain customized documents (e.g. testing methods and procedures guides) technicians could view/download via the Mobile Tech app.

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** to use this feature. See "[Organization settings](#)" on page 280.

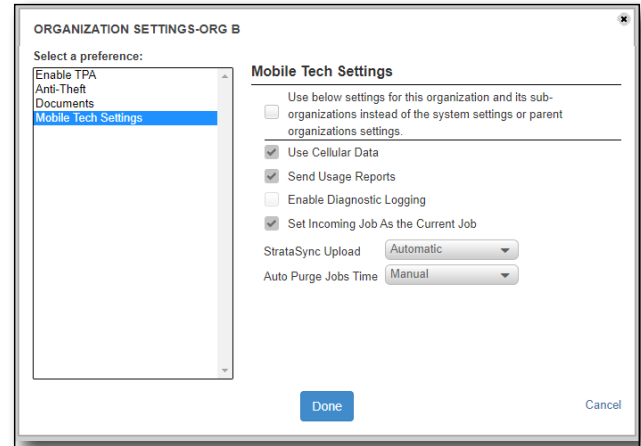


For Custom Documents, any documents uploaded for higher-level organizations will also be available at lower-level organizations, so only upload documents at higher-level orgs that should be accessible for everyone. Upload documents at lower-level orgs to target specific workgroups.



For Mobile Tech Settings, setting **Use below settings for this organization and its 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.



Job template auto deploy settings

This feature allows you to set Job Template Auto Deploy Settings at the organization level to enable deployment at that org (and any orgs underneath it in the hierarchy).

Enable **System Settings > Job Template Settings** to use this feature. See ["Job template settings" on page 290](#).

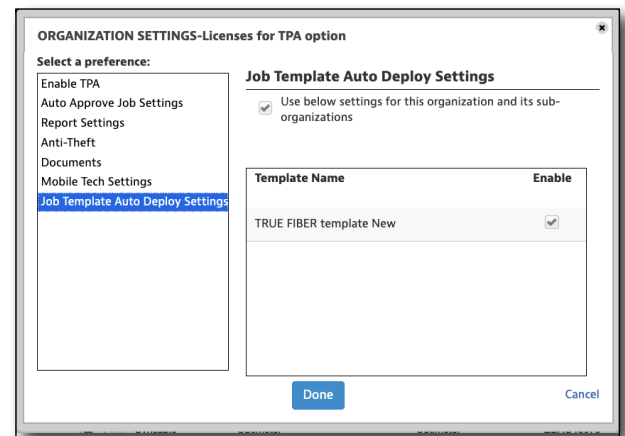
TPA job templates are now auto-deployed to any user (and their associated instruments) in the organization (or sub-organizations) where the job template is saved. Users who are added or moved to the job template's organization (or any sub-organization) have the job template automatically deployed to them, and users who are moved outside of the job template's organization have the job template removed from their Mobile Tech app and/or test instruments upon the next sync with StrataSync.

A job template can be moved to a different organization, which will remove deployment from the previous organization.

Please note that the StrataSync account must be licensed for SS-PRO or higher.

Select **Use below settings for this organization and its sub-organization...** at the per-organization level, to override any settings at a higher-level organization, then configure the settings.

When finished, click **Done**.

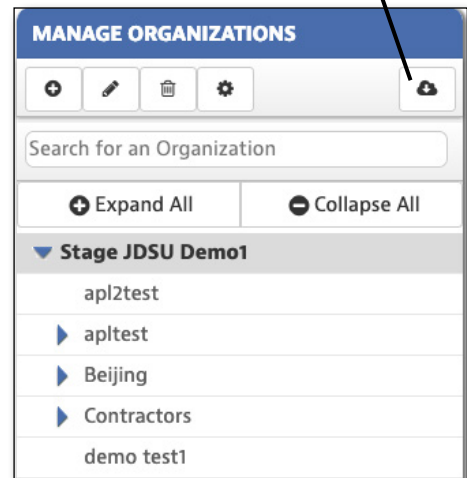


Downloading organization data

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 105*.

People tab

Using the **People** tab from the Organization List is similar to details covered previously. See *"People" on page 179*.

Licenses tab

Using the **Licenses** tab from the Organization List is similar to details covered later in this guide. See *"Licenses" on page 259*.

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

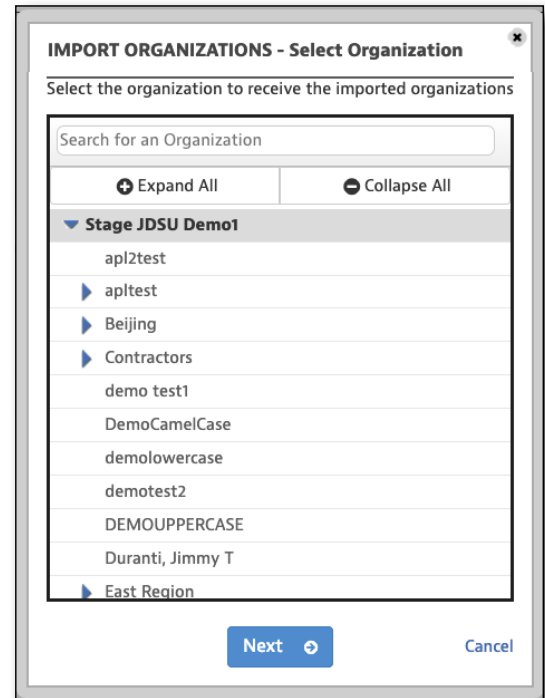
This section details how to import organization hierarchy from a CSV file.

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**.

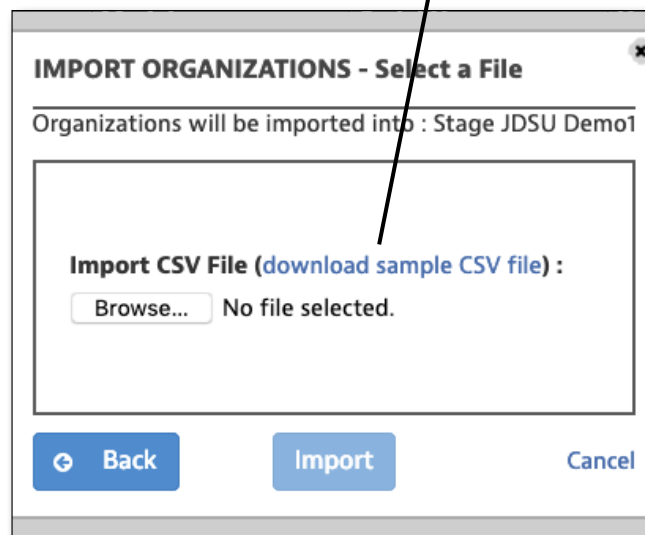
Make sure you retain the header row and enter the data fields starting on row 2. See the sample file for more information.

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 236
- "Searching and sorting" on page 237
- "Views" on page 240
- "Importing job templates" on page 250
- "Deploying job templates" on page 252
- "Automatic template deployment and artifact linking" on page 254
- "CATV, Fiber, Other Work Orders, and Audit Templates" on page 258

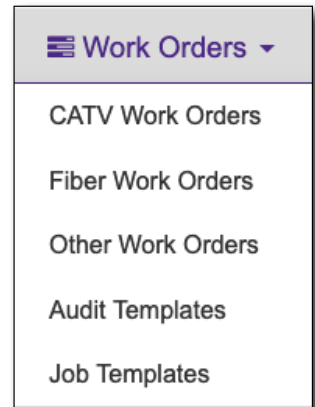
Work Orders

The **Work Orders** tab is the hub for all of the work orders management features of your StrataSync account for your field instruments, including: CATV, Fiber, Other work orders, and Audit 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](#)).

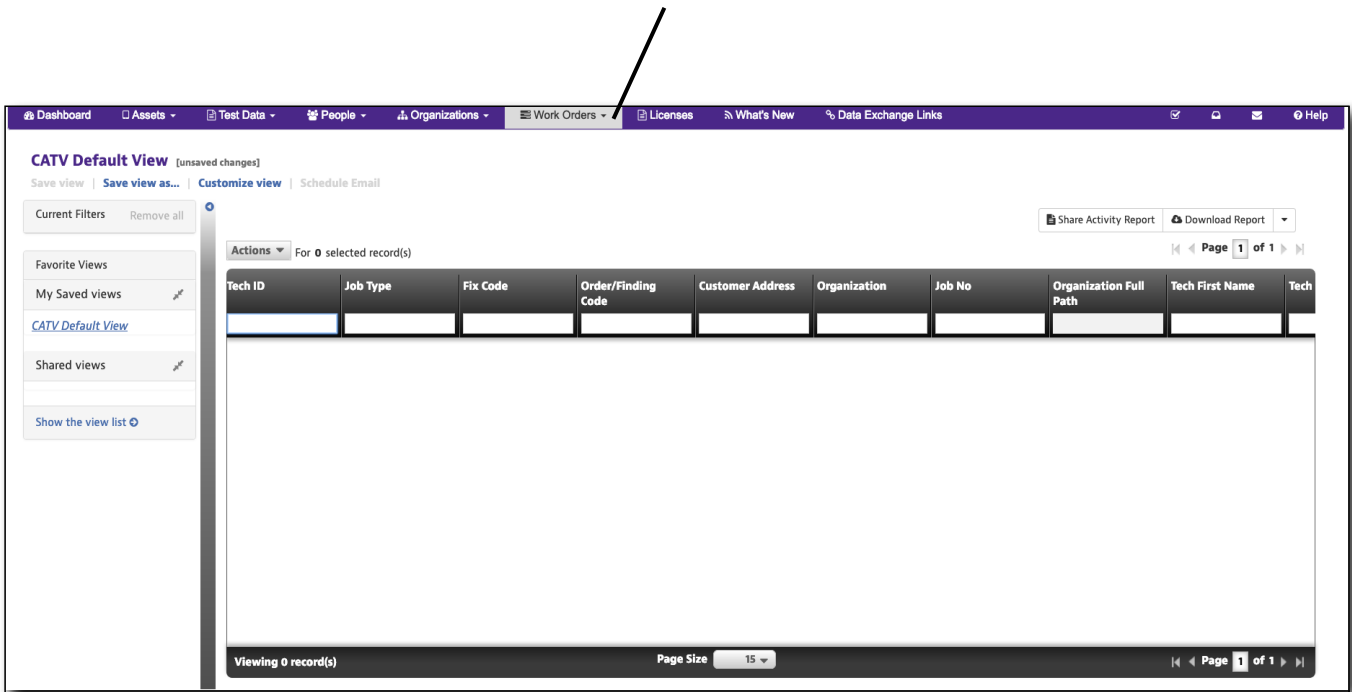
Click the **Work Orders** tab in the Main menu to bring up the Work Orders dropdown.

This feature requires customers be subscribed to the StrataSync ANALYTICS subscription plan at a minimum.



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

T-BERD

- 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	
Default View	

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)									

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.

The screenshot shows a filter dialog box titled 'STATUS FILTER' with a close button (x) in the top right. The dialog is open over a table with columns 'Status' and 'Tested'. The 'Status' column contains the text 'Closed, Reschedule'. Inside the dialog, there is a link 'Clear selected items' and a list of status options with checkboxes: 'Closed' (checked), 'Rescheduled' (checked), 'Cancelled' (unchecked), 'Completed' (unchecked), and 'Open' (unchecked). An 'Apply' button is located at the bottom of the dialog.

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.

The screenshot shows a date range filter dialog box titled 'SELECT A DATE RANGE' with a close button (x) in the top right. The dialog is open over a table with columns 'Scheduled Date' and 'Customer Account No'. Inside the dialog, there is a dropdown menu set to 'Exact dates'. Below this, there are two input fields: 'Start:' with the value '1/24/19' and 'End:' with the value '4/25/19'. Each input field has a calendar icon to its right. An 'Apply' button is located at the bottom of the dialog.

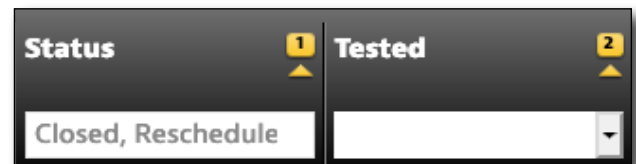
**NOTE:**

You can save custom filters to a favorite view for easy reference. See *"Saving views"* on page 241.

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.

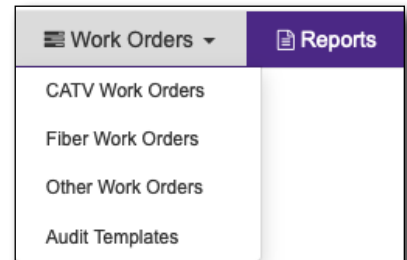


Views

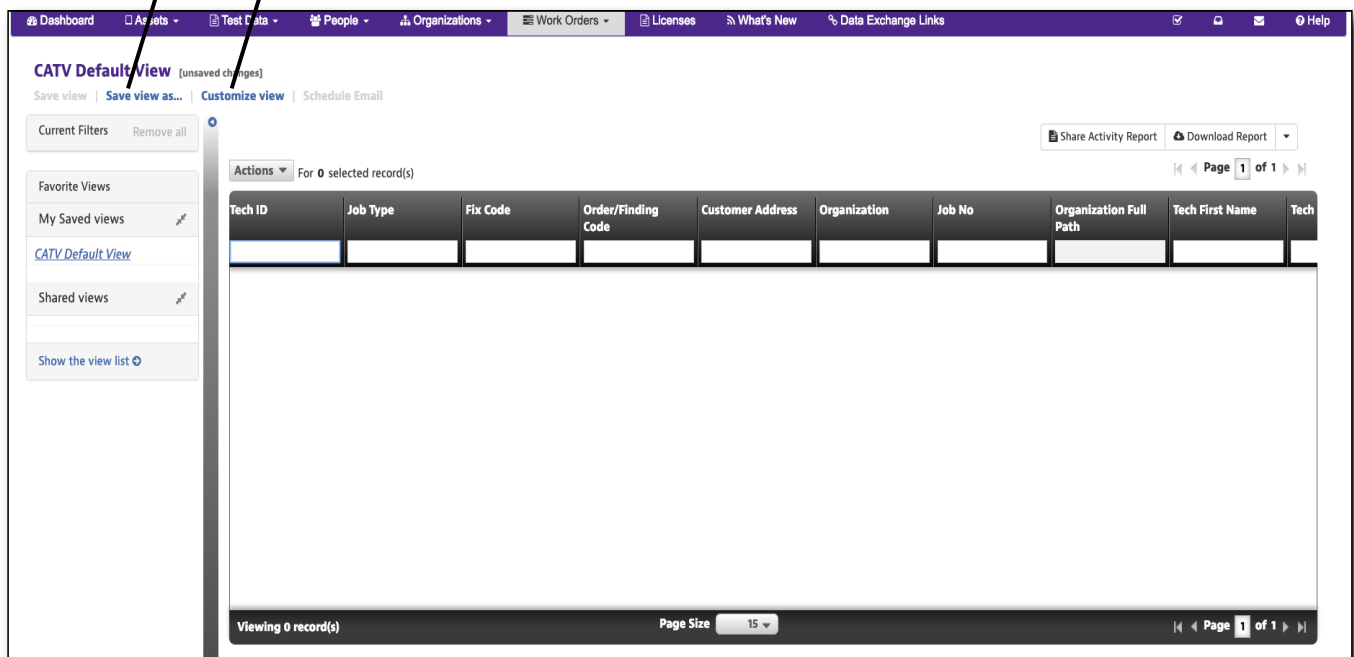
Customizing views

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.



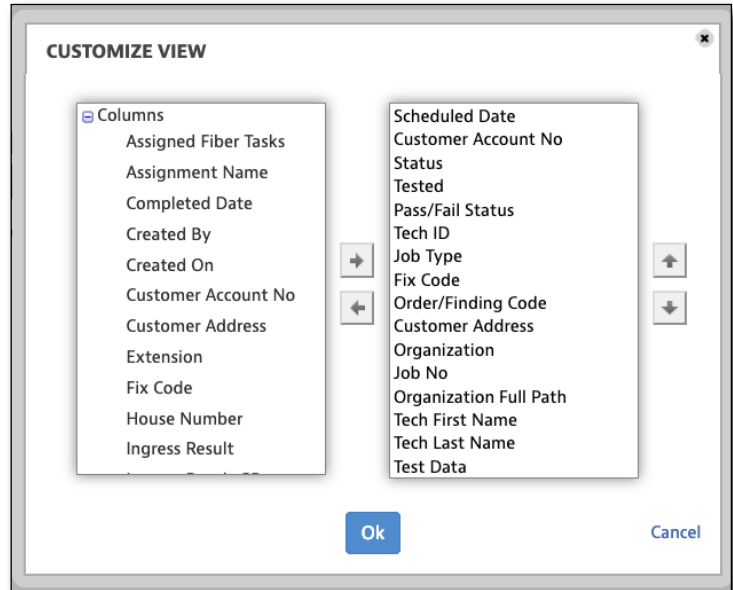
Save view as **Customize view**



Work Orders Default View

The Customize View screens appears.

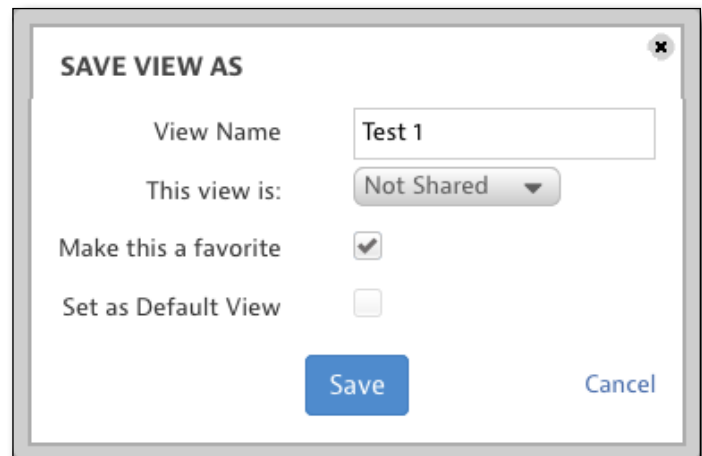
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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

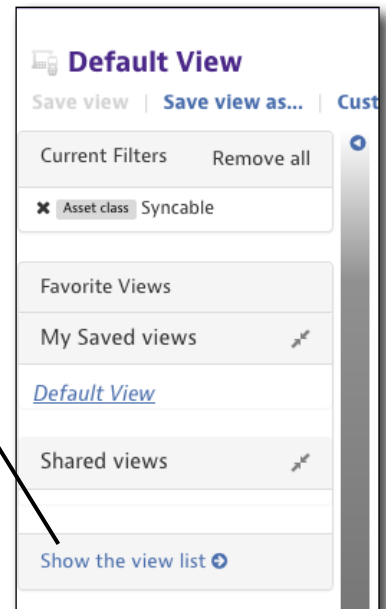
The new view is listed under the Favorite Views section on the left.



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"/>	Rename Delete
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

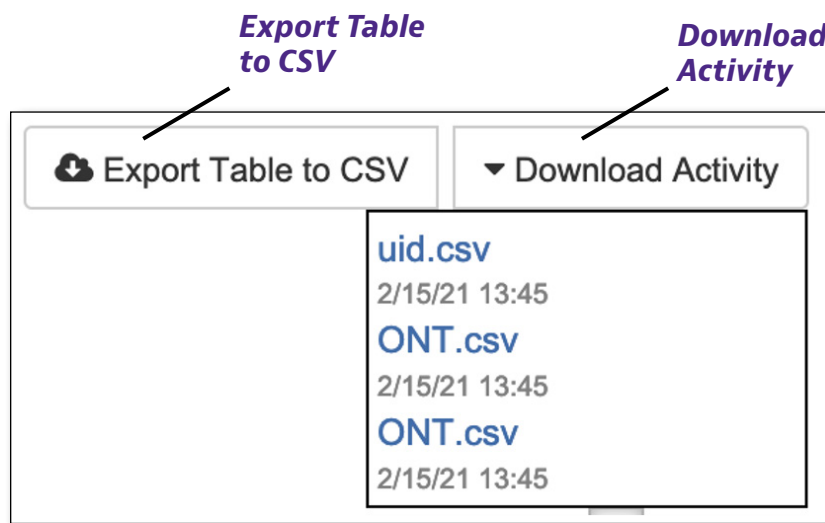
Exporting lists to CSV

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

Technician Assignment

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

ORGANIZATIONS

Search for an Organization

Expand All Collapse All

- East Region
 - Eningen
 - Firmware Upgrade Test 01
 - Firmware Upgrade Test 02
 - ImportAssets
- North Region
 - NSC
 - Org7
 - PathTrack
 - Sri Org
 - Sri Org 2
 - StrataSync
- Test1
 - Test2
- West Region
- Workflow Solutions
- ZTel

Show More

People (2)

Page 1 of 1

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

Viewing 2 record(s) of 2

Page 1 of 1

Assign to Organization : ZTel Cancel

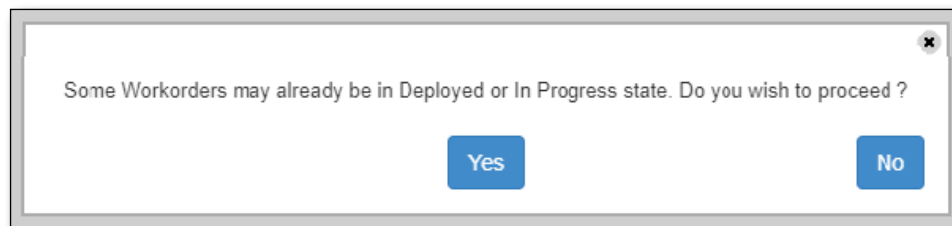
1. From the Work Order List, select a work order (or orders) by clicking the checkbox to the left of the item.
2. Right-click the item (or use the **Action** dropdown) and select **Assign**. The Technician Assignment screen appears.
3. Select the organization and a user, then click the **Assign to Organization** 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 210.*

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
<input checked="" type="checkbox"/>	5/10/21 JOBMJP10MAYCATV003	677,932	viaviJob		INPROGRESS	Fail	1 of 3	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV004				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV005				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JobMJP10MAYFIBER001				INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JobMJP10MAYFIBER002				INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>	5/10/21 JOBMJP10MAYCATV006				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>	5/10/21 JOBMJP10MAYDSL001				COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2

The workorder 'State' has been updated to "CANCELLED".

<input checked="" type="checkbox"/>	5/10/21 JOBMJP10MAYCATV003	677,932	viaviJob		CANCELLED	Fail	1 of 3	mjp007	Michael	Proctor	0	1
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By selecting this same cancelled workorder you can select the **Make it Active** action, shown below.

Export Table to CSV Download Activity

Actions For 1 selected record(s) Page 1 of 2

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"/>		TV004	677,936	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>		TV005	677,943	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>		ER001	677,947	viavJob	INPROGRESS	Fail	1 of 12	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>		ER002	677,970	viavJob	INPROGRESS	Fail	1 of 6	mjp007	Michael	Proctor	0	1
<input type="checkbox"/>		TV006	677,977	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	0	3
<input type="checkbox"/>		L001	677,981	viavJob	COMPLETED	Fail	3 of 3	mjp007	Michael	Proctor	1	2
<input type="checkbox"/>		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.

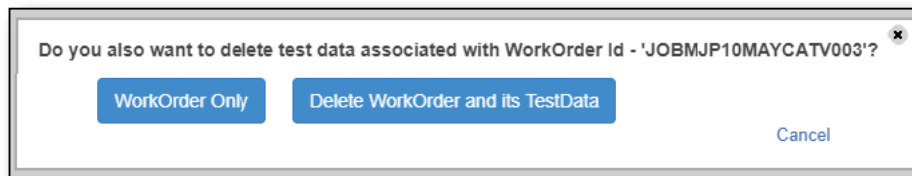
<input checked="" type="checkbox"/>	5/10/21	JOBMJP10MAYCATV003	677,932	viavJob	INPROGRESS	Fail	1 of 3	mjp007	Michael	Proctor	0	1
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Export Table to CSV Download Activity

Actions For 1 selected record(s) Page 1 of 2

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.

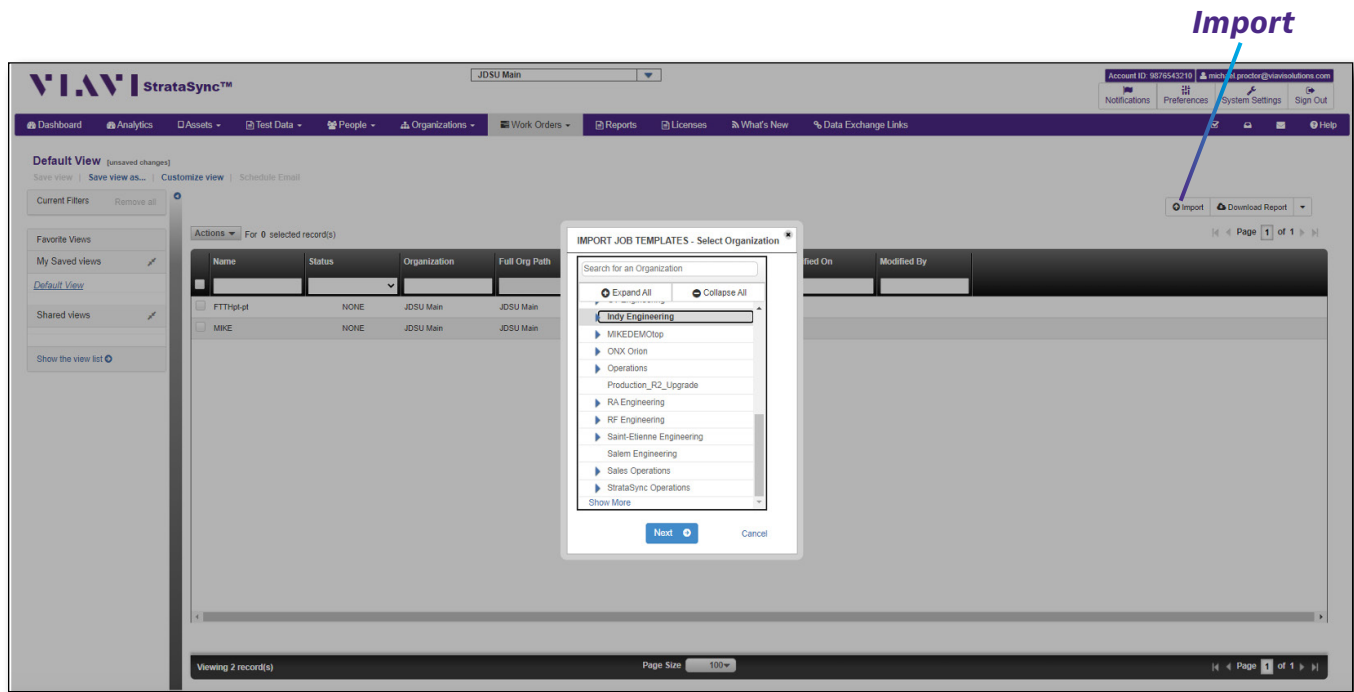


Customers must be licensed for workorder integration to utilize this capability (either ANALYTICS or ENTERPRISE WORKFLOW subscription plans or legacy workorder integration licensing).

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.

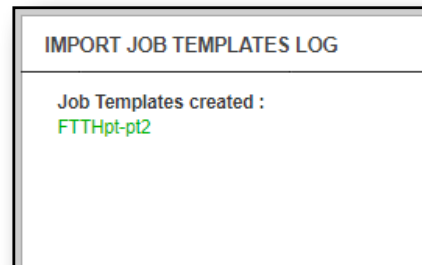
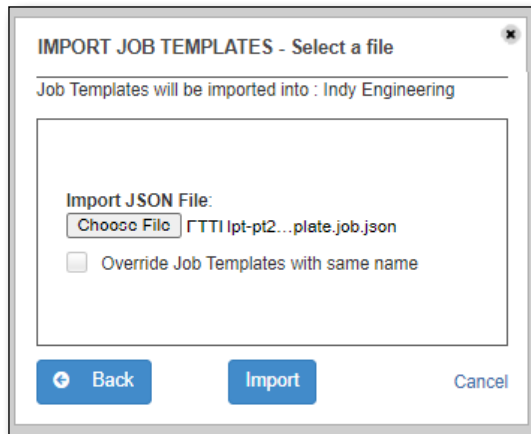


Job template import

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 "Creating a job template" on page 89.

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's 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's a 'Default View' section with options to save or customize the view. A table of job templates is displayed with columns: Name, Status, Organization, Full Org Path, Created On, Created By, Modified On, and Modified By. The 'ONXS80 Install' row is selected, and an 'Actions' dropdown 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 table also shows other rows like 'MIKE', 'ONX-DSLmike', 'ONX CATV Install', 'BigNet-09', and 'BigNet-08'. The interface includes pagination controls at the bottom right, showing 'Page 1 of 1'.

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

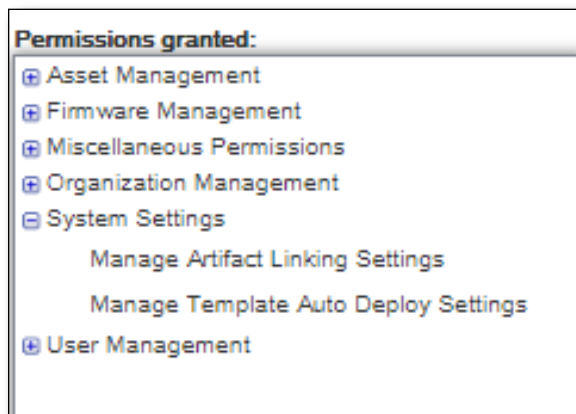
- Templates may be automatically deployed to assets when the template's artifacts have been changed.
- Automatic template deployment is selectable by organization.
- System level permissions are required to enable this capability.
- Users of automatic template deployment should fully understand the organization 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 203*.



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 272*.

This feature allows you to enable configuration template auto deployment and if configuration artifacts link from the Global Archive or templates.

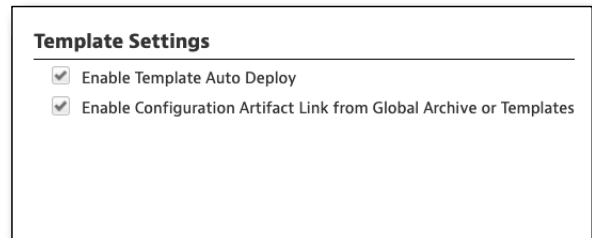
Choose from these options:

- **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 150*.

When finished, click **Done**.

For more detailed information on auto template deployment and artifact linking, contact us at TAC@viavisolutions.com.



Organization settings

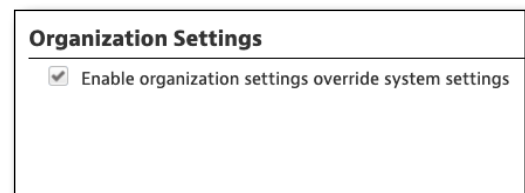
Select **System Settings > Organization Settings** to bring up the Organization Settings section.

For more details, see *"Configuration" on page 272*.

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.

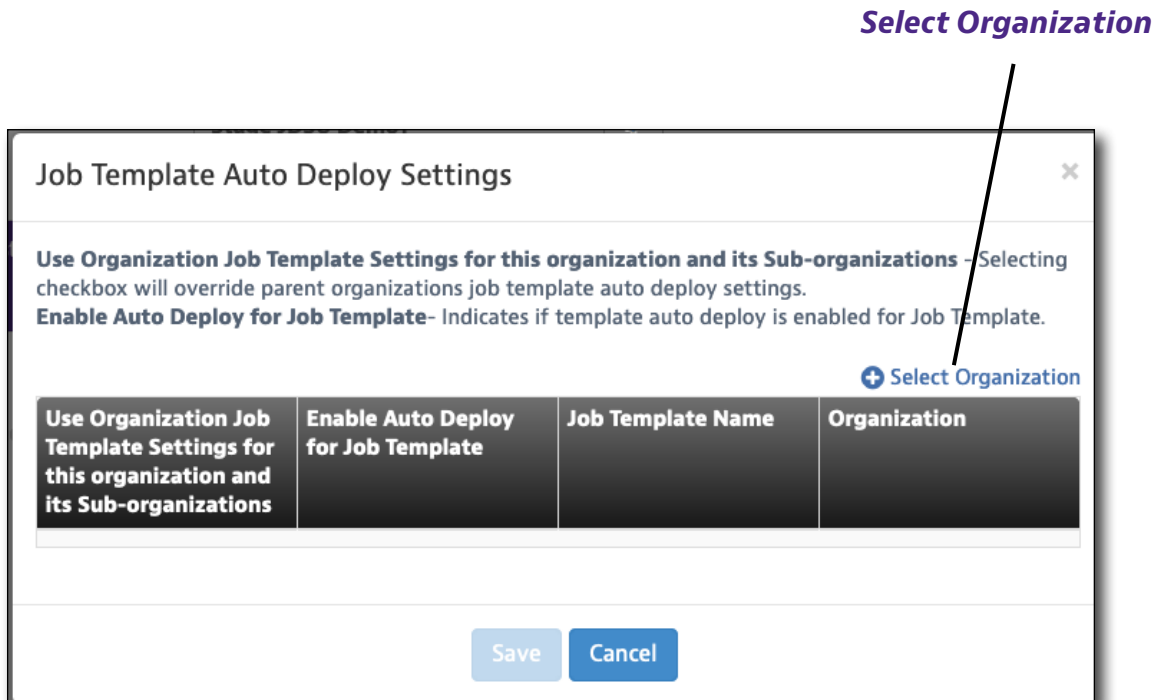
When an organization is participating in auto-deploy of job templates, StrataSync makes sure each asset will have templates that are set up for auto-deploy. If an asset uploads a job template that is not participating in auto-deploy then StrataSync will issue all auto-deploy templates. This will remove 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 TAC@viavisolutions.com for additional information.

Licenses

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

- "Licenses" on page 260
- "Searching and sorting" on page 263
- "Views" on page 266
- "Software option licensing" on page 269

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		Standard	Advanced			
Dashboards		Available default dashboards				
APIs		<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 266 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.

Note: When the license expires, a popup comes up in StrataSync as a reminder. It disappears when the new purchase license becomes active.

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	
Default View	

The screenshot shows the Licenses List interface with a search filter applied to the Organization column. The filter criteria is listed under the Current Filters section on the left. The table displays the following 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

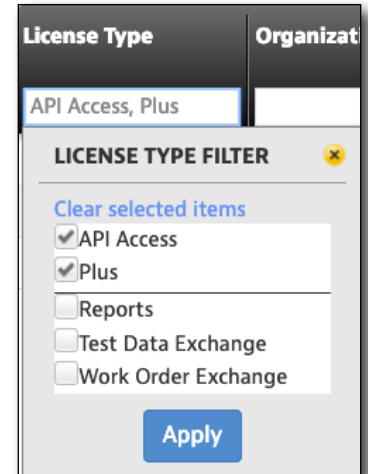
Viewing 3 record(s) | Page Size: 15 | Page 1 of 1

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:

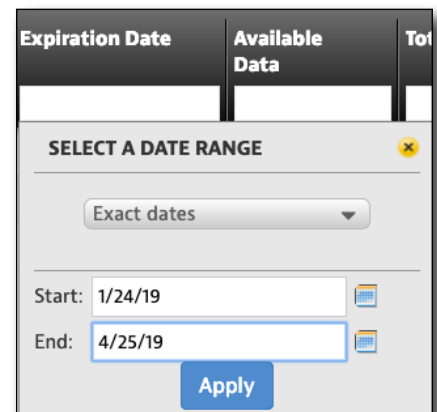


Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.

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.

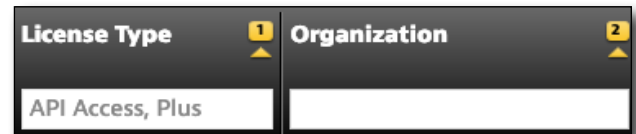


**NOTE:**

You can save custom filters to a favorite view for easy reference. See ["Saving views" on page 267](#).

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.



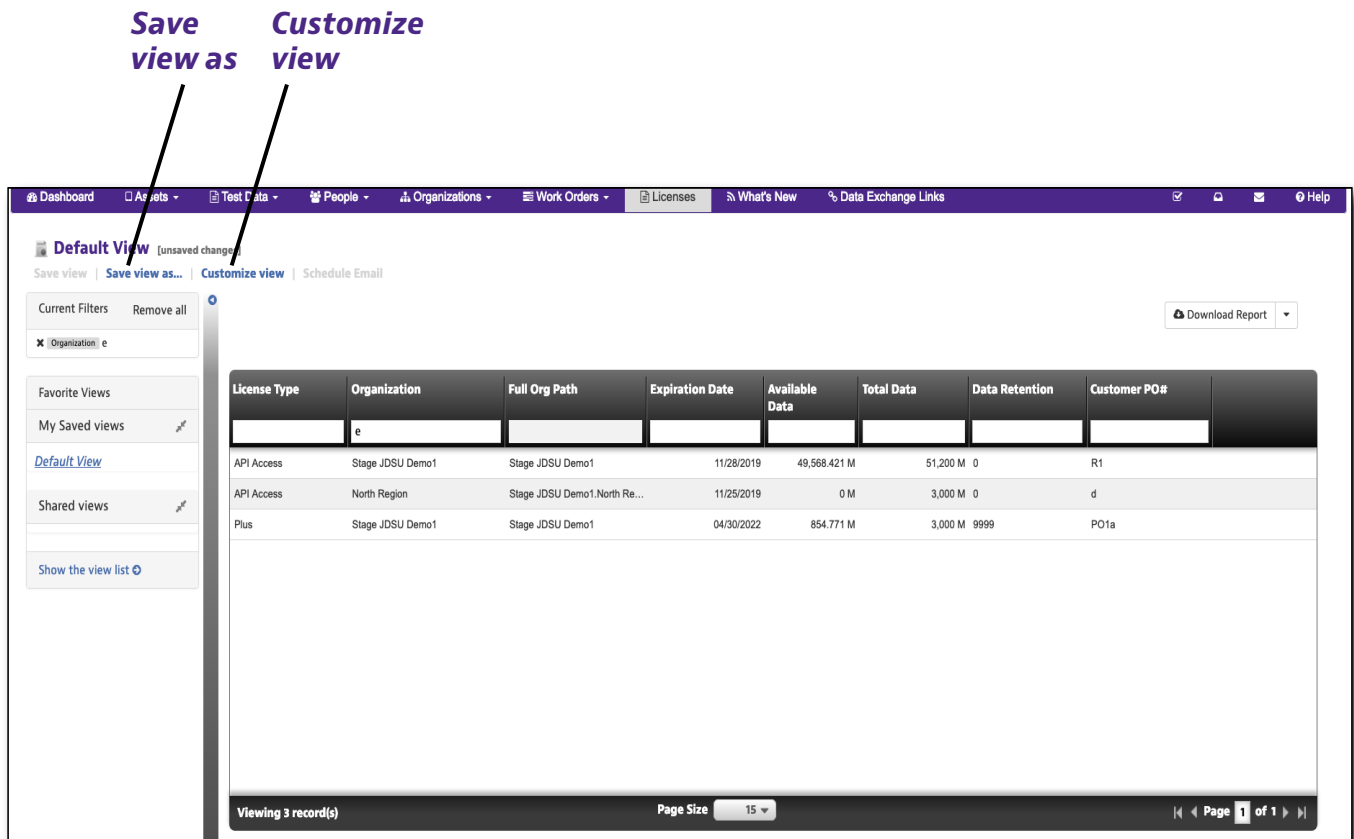
If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

Views

Customizing views

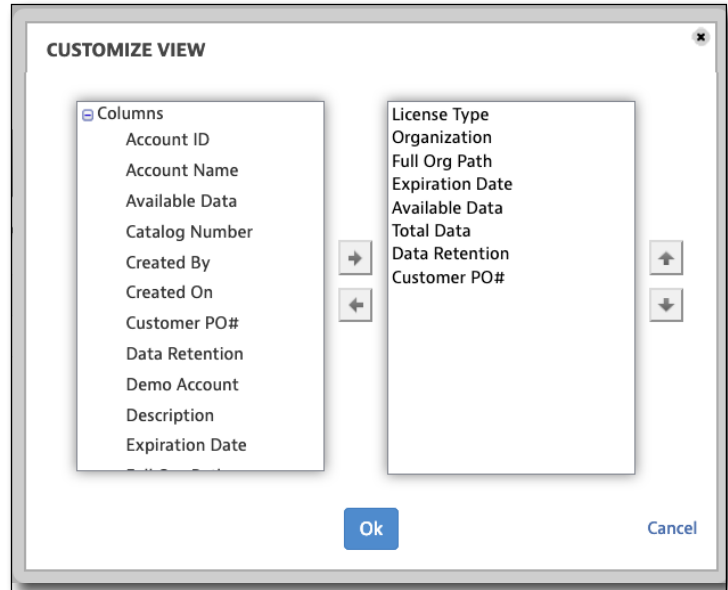
StrataSync gives you the ability to customize your list views.

1. Select the **Licenses** tab. The Licenses List appears.
2. Select **Customize view** at the upper left of the screen.



Licenses Default View

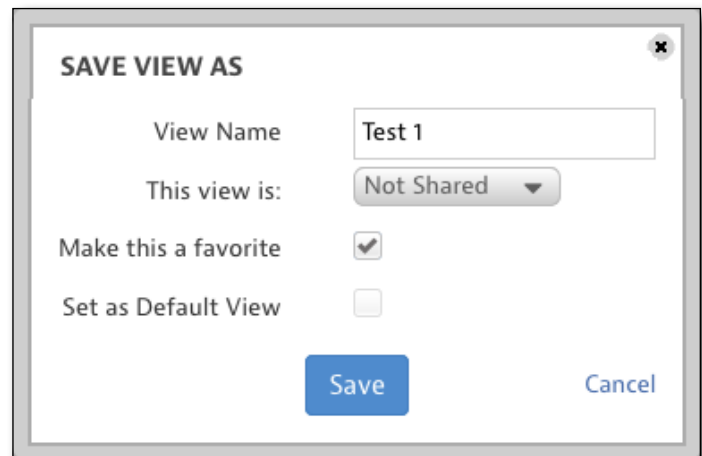
1. The Customize View screens appears.
2. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
3. Select an attribute, then use the arrow buttons to add or remove 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**.

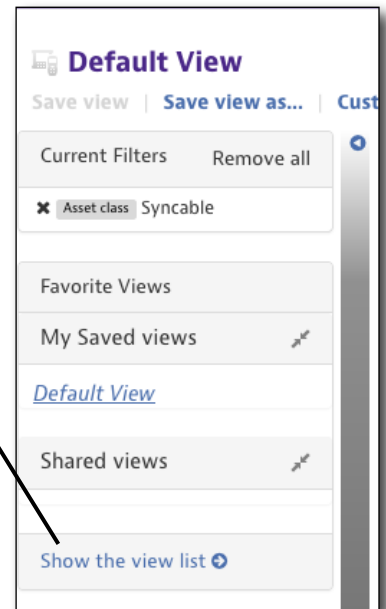
The new view is listed under the Favorite Views section on the left.



Sharing and editing views

- 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



- Choose whether you want to share a view or not, make a favorite, a default, rename, or delete.
- 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"/>	Rename Delete
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

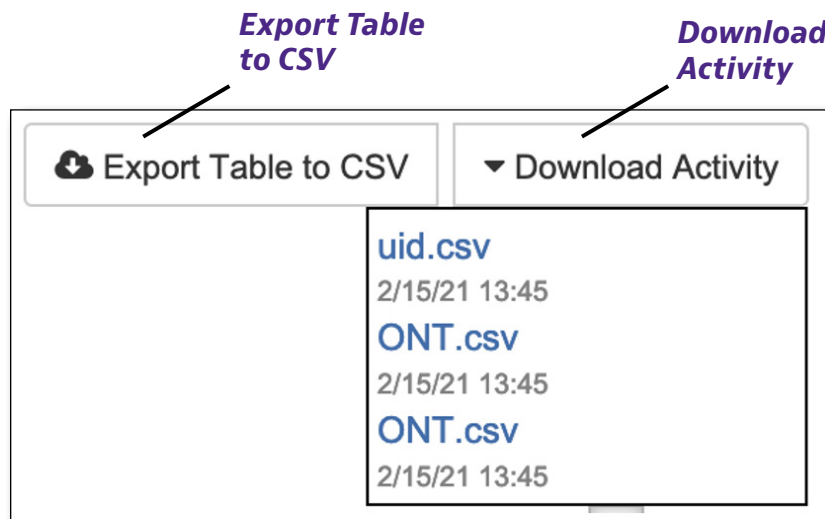
Exporting lists to CSV

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 105*.

Configuration



This chapter covers how to configure the StrataSync system, including the following::

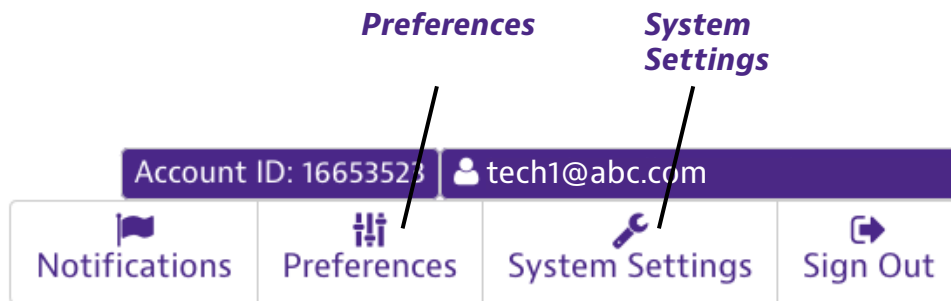
- "Configuration" on page 272
- "Preferences" on page 272
- "System Settings" on page 276

Configuration

The **Preferences** feature allows you to configure your user preferences, including general appearance, language, security, notifications, measurement units, and dashboard settings.

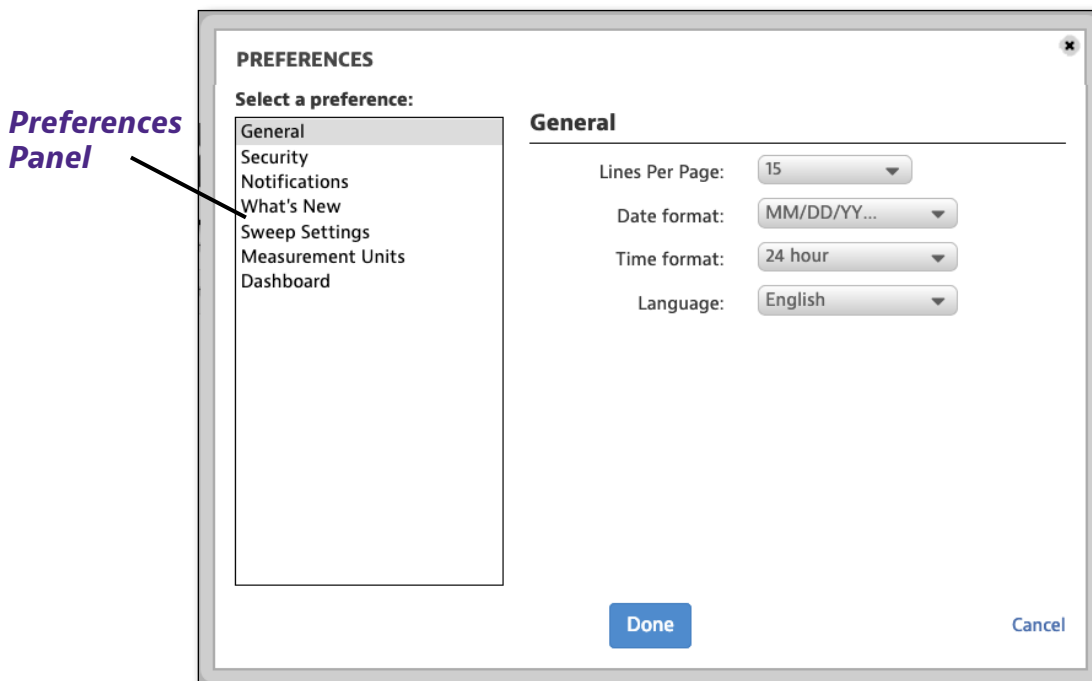
The **System Settings** feature allows StrataSync administrators to configure the overall system, including security, asset management, organization, firmware management, and configuration template settings.

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

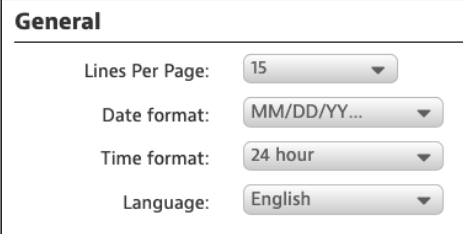
General

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**.

Note: The settings for date format, time format, and language are not used by the Test Process Automation UI.



General

Lines Per Page: 15

Date format: MM/DD/YY...

Time format: 24 hour

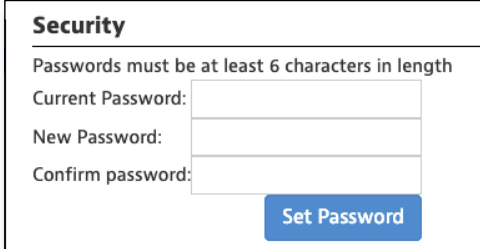
Language: English

Security

Select **Security** to bring up the Security section.

This feature allows you to set up and change your password.

When finished, click **Done**.



Security

Passwords must be at least 6 characters in length

Current Password:

New Password:

Confirm password:


Set Password

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**.



Notifications

Select notification subscriptions:

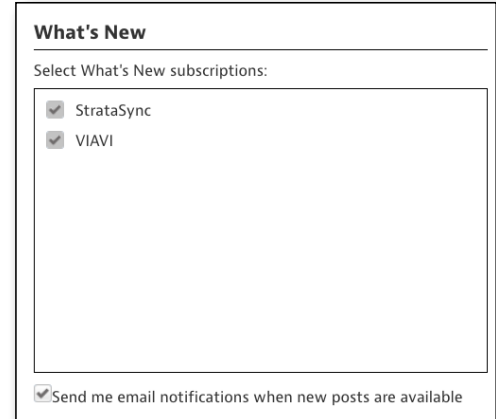
- Asset Events
- Configuration Events
- Notable Dates
- Organization Events
- System Events
- Template Events
- User Created
- User Events

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.

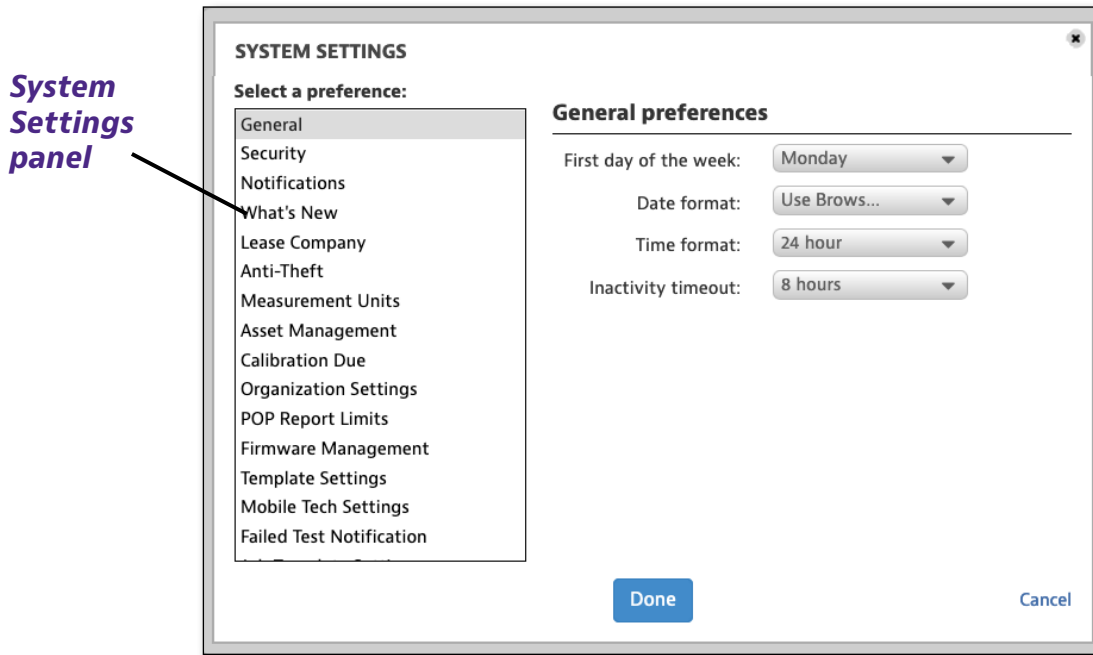
When finished, click **Done**.

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

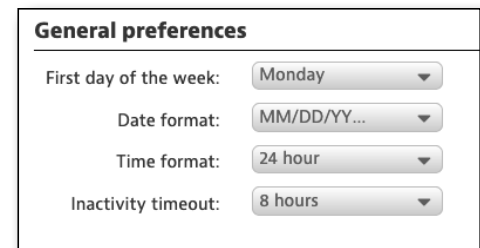
General

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: The settings for date format, time format, and language are not used by the Test Process Automation UI.



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	Edit Delete
JDSU	10	Edit Delete

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.

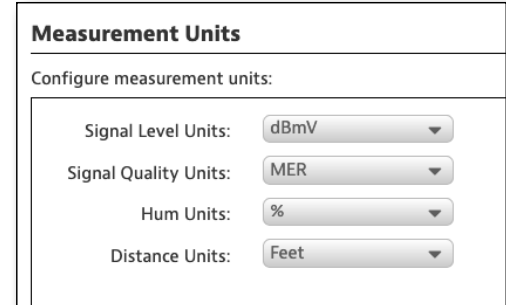
Anti-Theft			
Apply Anti-Theft settings to the following instrument types			
Asset Type	Enable Anti-Theft	Days	Power Cycles
CellAdvisor 5G	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CellAdvisor BSA	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="2"/>
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**.



Measurement Units

Configure measurement units:

Signal Level Units: dBmV

Signal Quality Units: MER

Hum Units: %

Distance Units: Feet

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.

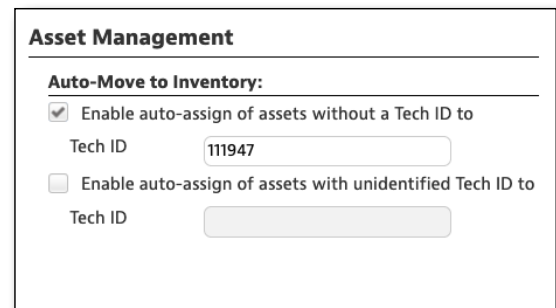
Without this option, the asset will be placed in the holding bin and manual management is required to move it to the inventory.

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 207](#).



Asset Management

Auto-Move to Inventory:

Enable auto-assign of assets without a Tech ID to
Tech ID 111947

Enable auto-assign of assets with unidentified Tech ID to
Tech ID

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.

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.

When finished, click **Done**.

POP Report Limits

Configure POP Report Limits: Restore To Default

24 Hour Deviation(dB):

Maximum Adjacent Channel(dB):

Maximum Analog Delta Video(dB):

Analog Delta Video Offset(dB):

Maximum Digital Delta Video(dB):

Digital Delta Video Offset(dB):

Minimum Video Level(dBmV):

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:

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
To Be Tested		4.0.21	4.0.21	2020/07/27	Beta
To Be Tested		4.1.10	4.1.10	2020/07/31	Beta

Template settings

Select **Template Settings** to bring up the Template Settings section.

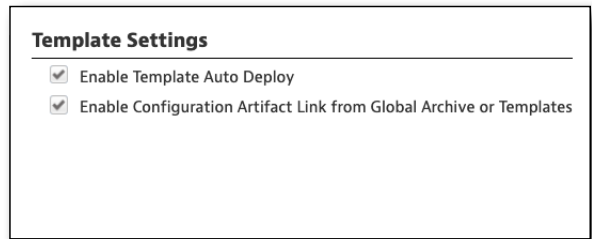
This feature allows you to enable configuration template auto deployment and if configuration artifacts link from the Global Archive or templates.

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 254* or contact us at TAC@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

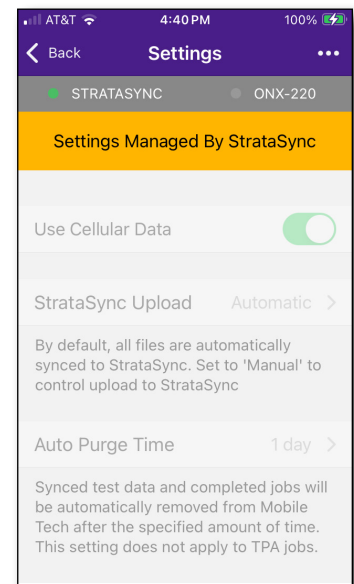
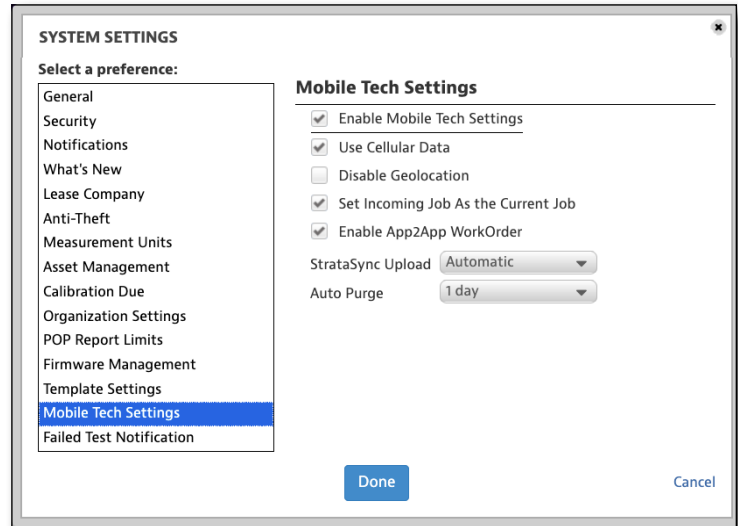
When enabled, any user logging into the Mobile Tech app will see the common settings grayed-out and a yellow banner stating "Settings Managed By StrataSync".

- **Use Cellular Data** – Allow Mobile Tech to use cellular data as well as WiFi
- **Disable Geolocation** – Disables geolocation services for reports
- **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
- **StrataSync Upload** – Sets the interval Mobile Tech syncs to StrataSync
- **Auto Purge** – Sets the frequency jobs are purged from the system

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 TAC@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.

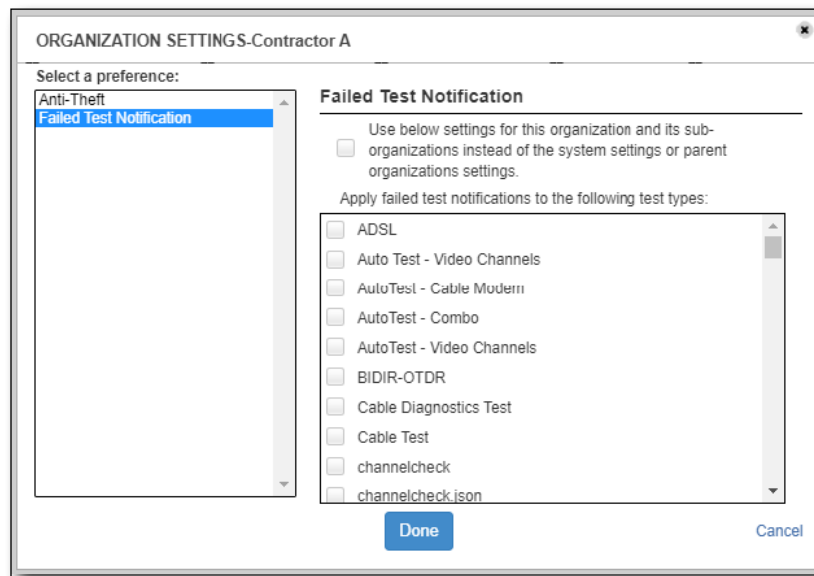
In addition, the email subject field can be configured from the default "Failed result uploaded".

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.

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.com	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.com	West	Manager	No	0	
northmgr.demo1@jdsu.com	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@viasolutions.com	Patrick	Noel	No	0	10/24/14
tech2.demo1@jdsu.com	tech2	demo1	t2d1	Technician	BHV Indianapolis	JDSU Demo 1 Legacy B...	mark.ortel@demo.jdsu.com	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.com	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.com	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:** Contains 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:** Shows Login Enabled (checked), 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: VIAW 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

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	Test Data File
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.

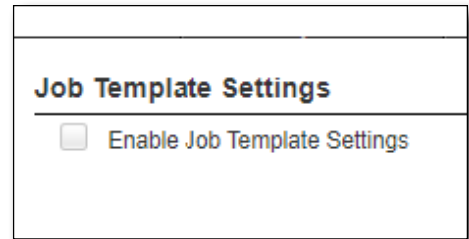
Job template settings

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.



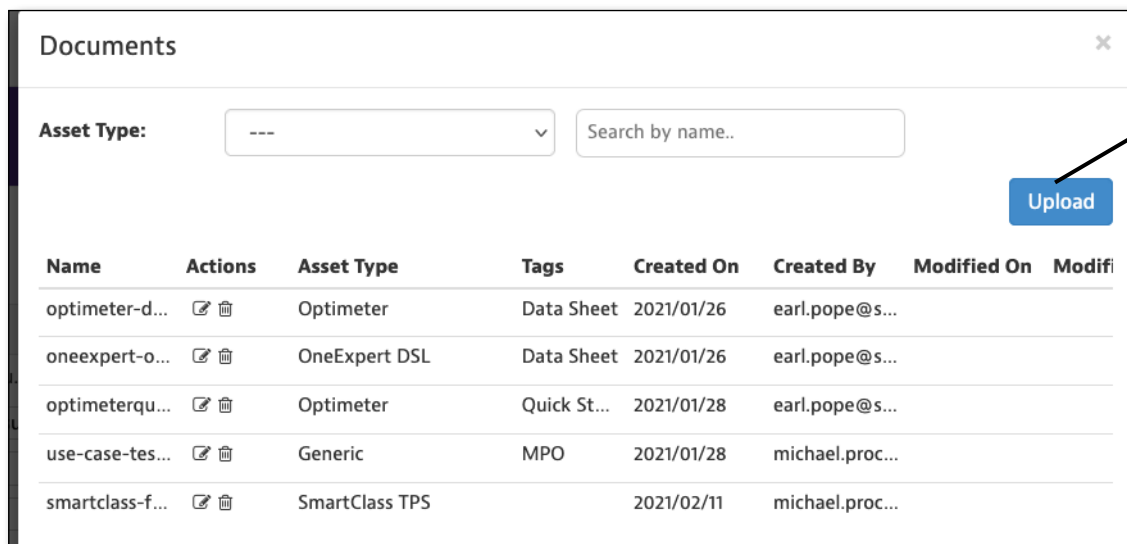
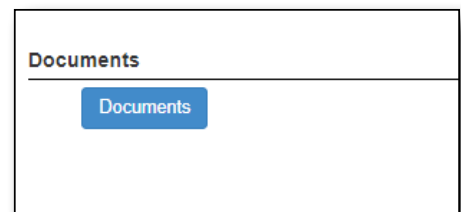
Documents

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

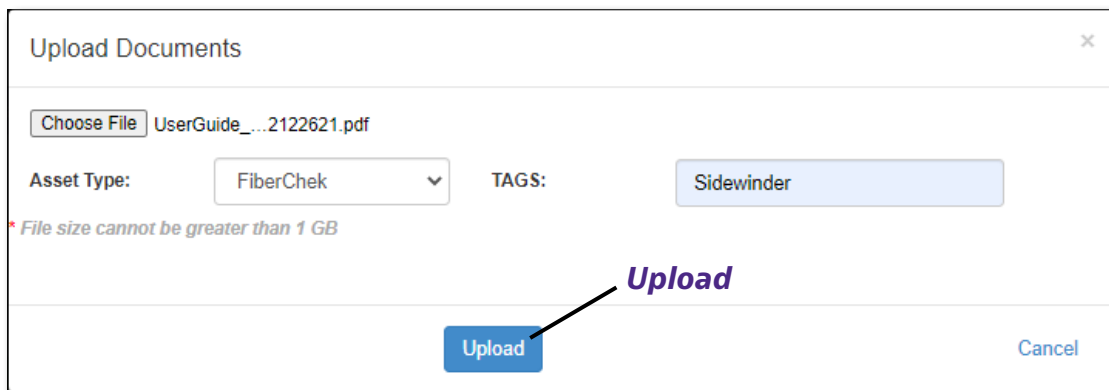
Choose a file to upload, as well as select a specific instrument (asset) type from the dropdown (or select 'Generic'), and also provide tags to further aid document searching. Select **Upload** again to upload your document.

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.

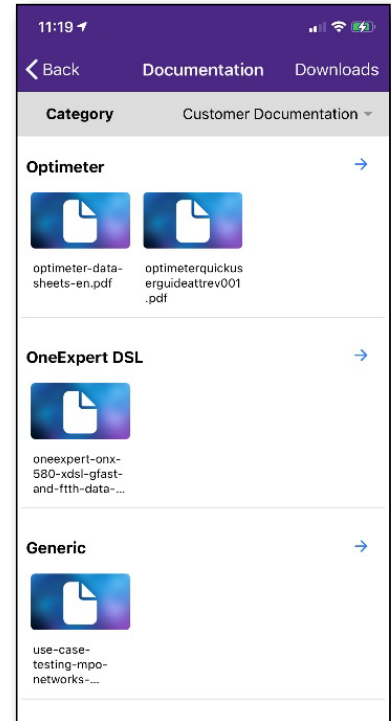
When finished, close the document list and click **Done**.



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 Work Order Settings section.

This feature allows support for monthly (runs on the 1st day of every calendar month) automatic purging (deletion) of work orders 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**.

The screenshot shows a dialog box titled "SYSTEM SETTINGS" with a close button in the top right corner. On the left, there is a list of settings categories, with "Auto Purge WorkOrder Settings" selected and highlighted in blue. The main area of the dialog is titled "Auto Purge WorkOrder Settings" and contains the following elements:

- A checkbox labeled "Enable Auto Purge WorkOrders(Applicable for fiberJob,viaviJob and swissAssignment)".
- A dropdown menu set to "13" with the label "After" and "Months of Scheduled Date".
- A list box titled "WorkOrder States" containing the following options: ALL, STARTED, ASSIGNED, DEPLOYED, INPROGRESS, COMPLETED, VERIFIED, AUDITED, APPROVED, ARCHIVED, and CANCELLED.
- A checkbox labeled "Delete testdata associated with Workorders".
- A blue "Done" button at the bottom center.
- A blue "Cancel" button at the bottom right.

Customers must be licensed for work order integration to utilize this capability (either the ENTERPRISE WORKFLOW subscription plan or legacy workorder integration licensing).

Auto approve job settings

Select **Auto Approve Job Settings** to bring up the Auto Approve Job Settings section.

This feature allows support to auto approve jobs after a set number of days, and can be configured system-wide, or per-organization. By default, auto-approval of jobs is disabled.

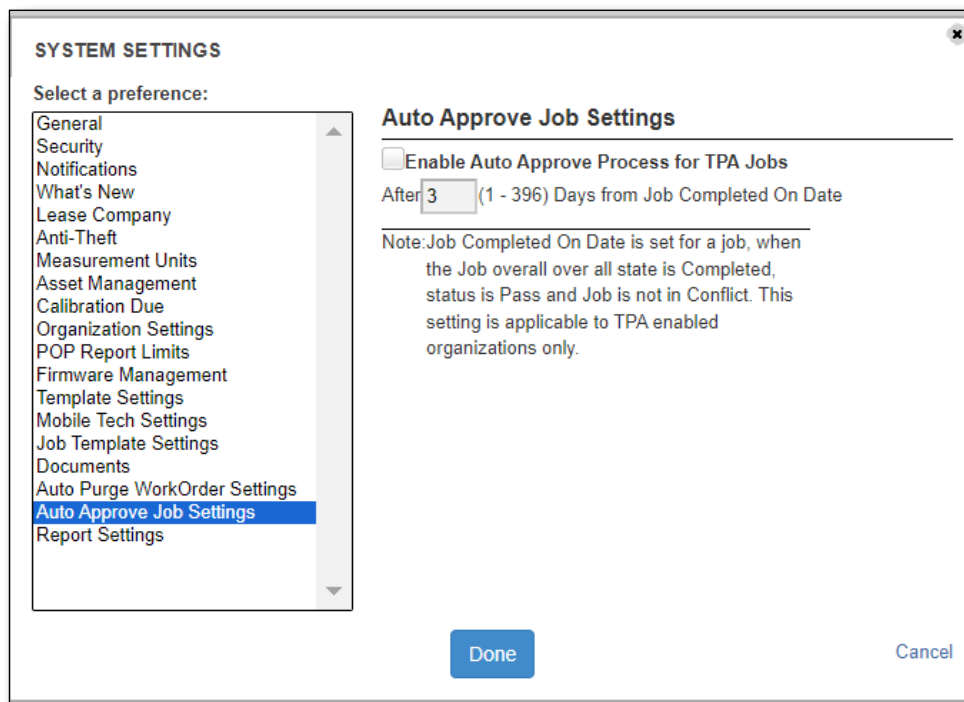
Note: Job Completed On Date is set for a job, when the Job overall state is Completed, status is Pass, and Job is not in Conflict. This setting is applicable to TPA enabled organizations only.

Please note that the StrataSync account must be licensed for SS-PRO or higher.

Select **Enable Auto Approve Process for TPA Jobs** and configure the settings.

When finished, click **Done**.

For per-organization settings, see *"Auto approve job settings" on page 227*.



Report settings

Select **Report Settings** to bring up the Report Settings section.

This feature allows support for report generation after a TPA job is approved, and can be configured system-wide, or per-organization. By default, reports are disabled.

When TPA jobs are approved (either manually or via auto-approval), StrataSync can generate a Summary and/or a Detailed PDF report.

The Summary PDF report currently supports the JSON REPORT.FComp PRO test type (reports are effectively empty for jobs with other test types), and summarizes key metrics across all FiberComplete PRO test results associated with the approved job.

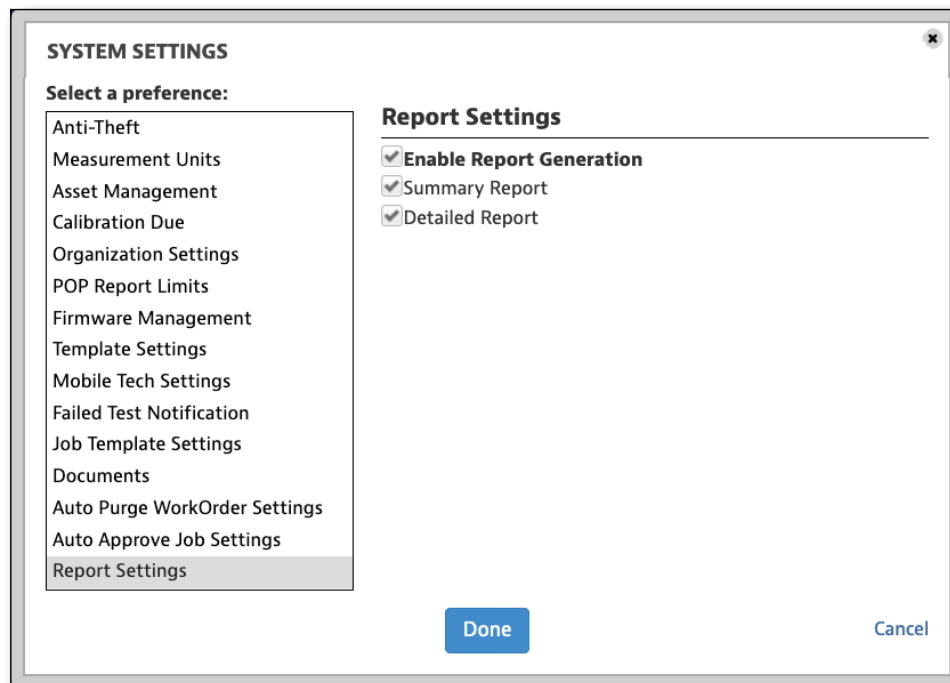
The Detailed PDF report concatenates any test results uploaded from VIAVI test instruments associated with the approved job which are PDF-formatted. Test results in other formats are not included.

Please note that the StrataSync account must be licensed for SS-PRO or higher.

Select **Enable Report Generation** and configure the settings.

When finished, click **Done**.

For per-organization settings, see ["Report settings" on page 228](#).



Using the Mobile Tech App

This chapter provides steps for using the VIAVI Mobile Tech app, including the following:

- "Using the Mobile Tech app" on page 298
- "Connecting to VIAVI test instruments" on page 299
- "Logging in to StrataSync" on page 302
- "Mobile Tech overview" on page 308
- "Viewing connected VIAVI instrument information" on page 311
- "Updating the firmware from StrataSync" on page 312
- "Job Manager" on page 313
- "Instrument Sync" on page 320
- "Instrument Files" on page 322
- "Mobile Tech Files" on page 324
- "SmartAccess Anywhere" on page 327
- "Remote Display" on page 328
- "Documentation" on page 329

Using the Mobile Tech app

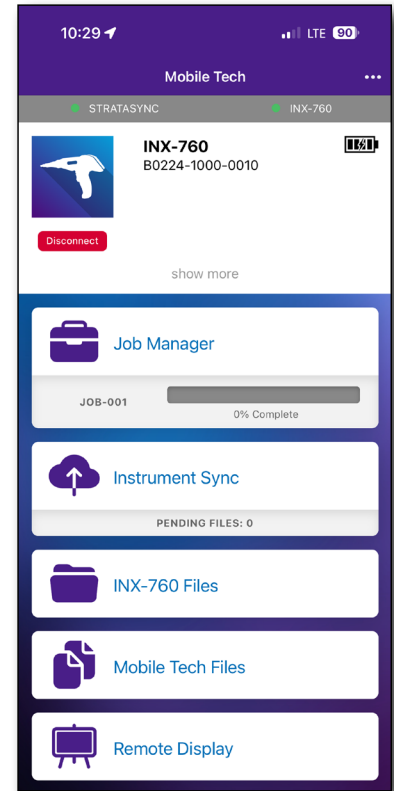
The VIAVI Mobile Tech app is a technician productivity app that automates synchronization with StrataSync for the connected VIAVI instrument.

Test results are automatically backed up in the cloud and new limit plans and configurations can be deployed to individual technicians from StrataSync. Up-to-date manuals, quick cards, training videos, and technical support can be accessed on demand within the app.

Test results are further enhanced with geolocation data to help associate technician work with customer locations. A file manager allows test reports to be downloaded from the instrument and sent to other mobile apps including email.

SmartAccess Anywhere codes can be shared via SMS and email. The connected test instrument interfaces can be viewed from your mobile device, if the connected instrument supports remote display.

After downloading the Mobile Tech app, connect to your test instrument and log in to StrataSync. Note that you can use Mobile Tech in a local (or offline) mode without connecting to StrataSync. The top grey bar displays the connection status with both StrataSync and the instrument.



StrataSync and Instrument status bar

At the top of Mobile Tech is the the status bar for connections to the instrument and StrataSync.

	StrataSync	Instrument
Grey dot	Not logged in	Not connected
Red dot	Connection error (typically due to poor mobile signal)	Connection error (typically due to distance to instrument)
Green dot (solid)	Connected	Connected
Green dot (blinking)	Data transfer in progress	Data transfer in progress

Connecting to VIAVI test instruments

VIAVI test instruments connect with the Mobile Tech app wirelessly via WiFi or Bluetooth, depending on the instrument.






Ensure the instrument you're connecting to has wireless hardware and wireless connectivity is enabled in the software; refer to the instrument-specific user manual for further information regarding wireless connectivity.

To connect with a new VIAVI test instrument

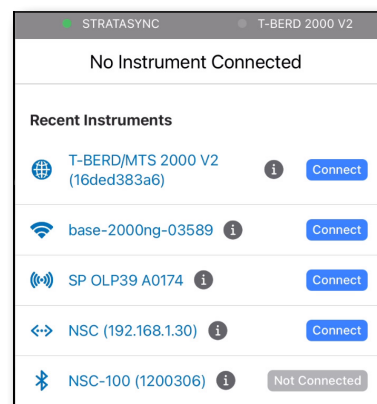
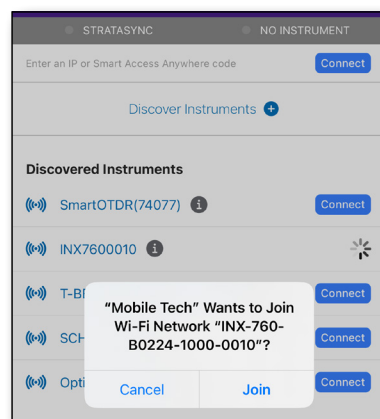
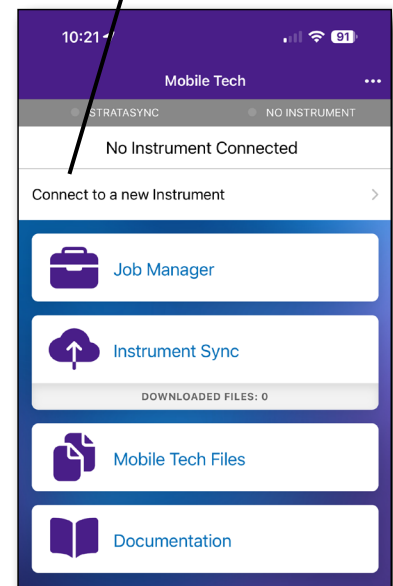
1. Power ON the test instrument.
2. Launch the **Mobile Tech app** on your mobile device.
3. Press **Connect to a new Instrument** and follow one of the below methods:
 - Discovered VIAVI instruments will be displayed on the screen. Find the instrument name and serial# for the instrument you want to connect to and press the Connect button next to that instrument.

Note that you may need to accept a pop-up to join the instrument WiFi Access Point (AP).

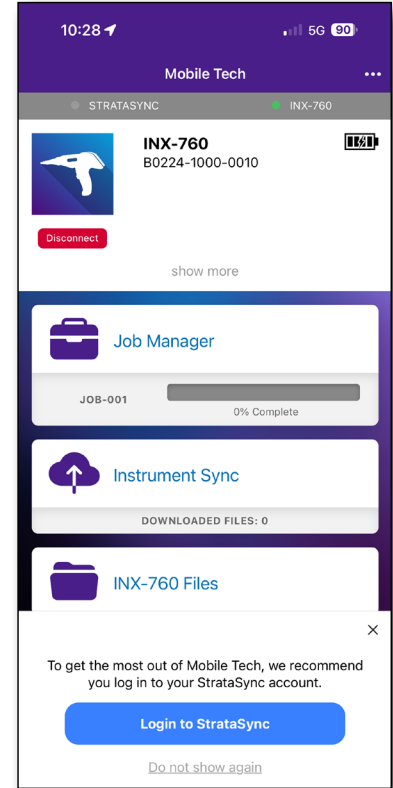
Icons

-  **WiFi**
-  **Bluetooth Low Energy (BLE)**
-  **Bluetooth**
-  **Wired**
-  **Smart Access Anywhere (SAA)**

Connect to a new Instrument



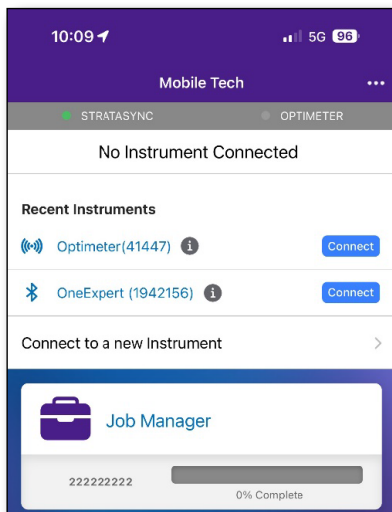
- In iOS only, you will also see a **Discover Instruments** selection. This can be used to find and pair with Bluetooth devices within Mobile Tech.
 You can alternately use the native iOS Bluetooth settings to pair with a Bluetooth instrument, which if paired this way then the instrument will be displayed in the discovered list described above.
- Enter the IP address of instrument in top bar and press the **Connect** button. You must be directly connected with or on the same local network as the instrument to use this method.
- Enter the Smart Access Anywhere (SAA) code from instrument and press the **Connect** button. The VIAVI instrument must have a network connection to connect to SAA server. Note that you will not take ownership of the instrument nor have full Mobile Tech app functions when connected to the instrument via SAA. The SAA feature is typically utilized to remotely connect to a VIAVI test instrument to remotely view the instrument display or test results.



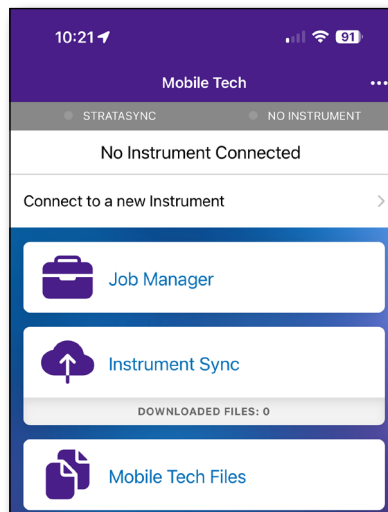
4. You will now be connected and be able to view details of the connected instrument.

Your connected instruments will be saved in the **Recent Instruments** section for future connectivity.

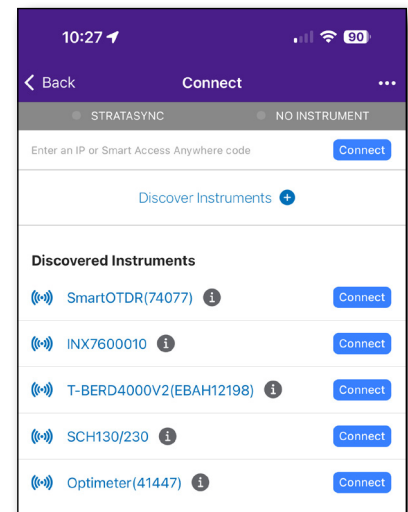
Mobile Tech will automatically reconnect to the last previously connected VIAVI test instrument – note that there is a setting in Mobile Tech settings to disable this, if desired.



Existing user, showing recent instruments



New user, showing no recent instruments

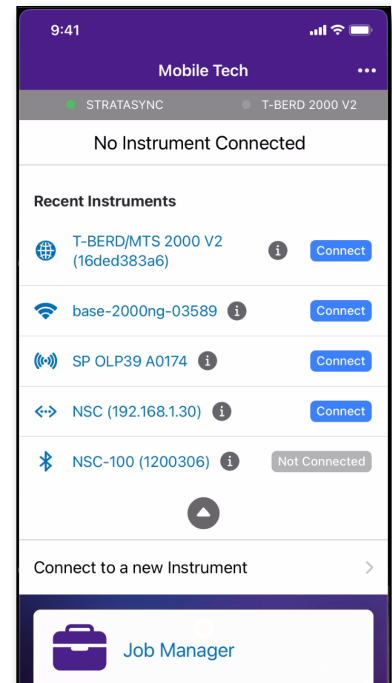


New user, showing discovered instruments

To connect a different instrument

1. Press the **Disconnect** button for your connected instrument.
2. In the **Recent Instruments** section, press the **Connect** button for the instrument you want to connect to.

If you have not previously connected to the instrument, see *"To connect with a new VIAVI test instrument" on page 299*.



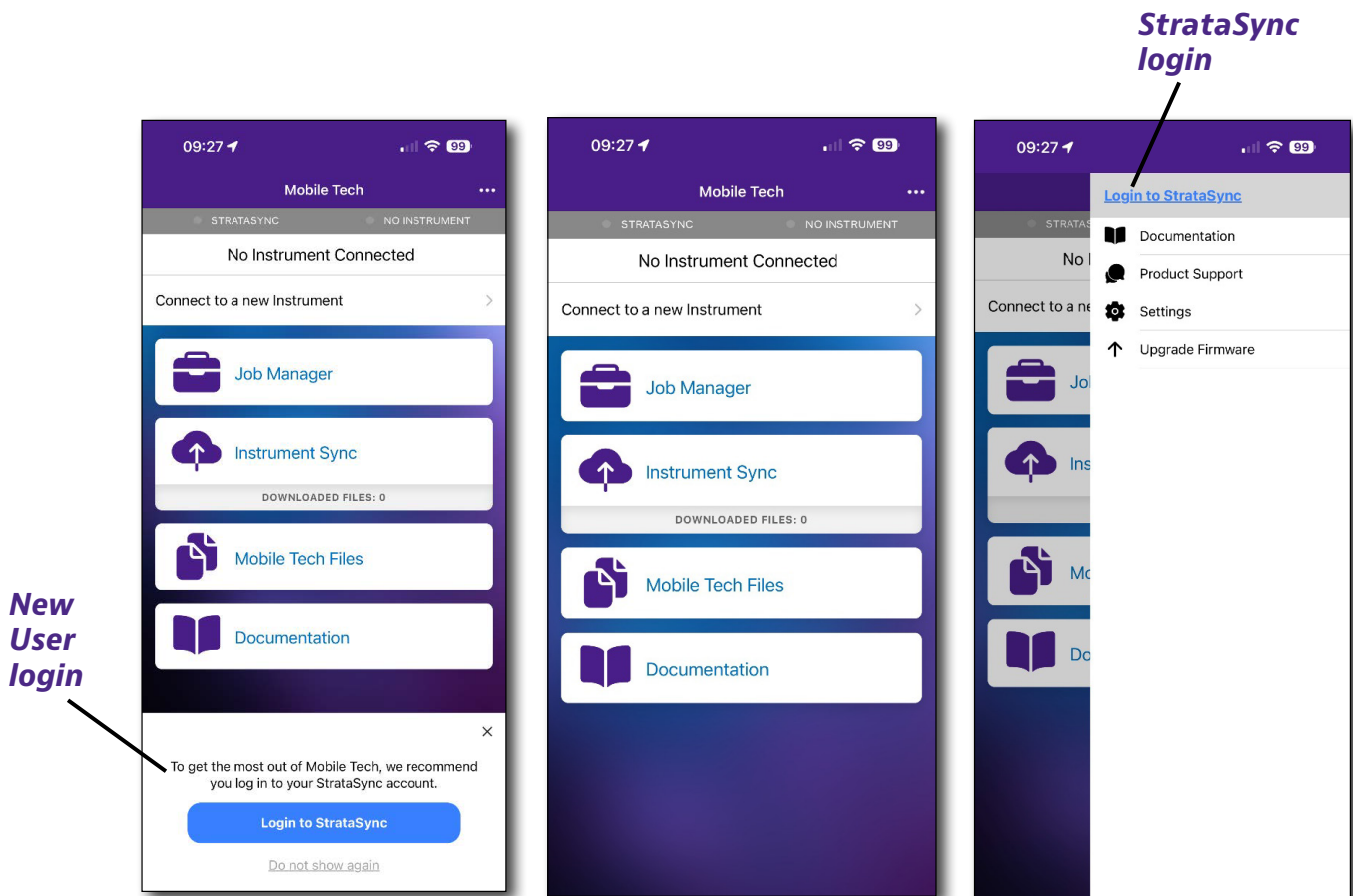
Logging in to StrataSync

When launching Mobile Tech and you're not logged in to StrataSync, you will see a pop-up at bottom of the app with a shortcut button to **Login to StrataSync**.

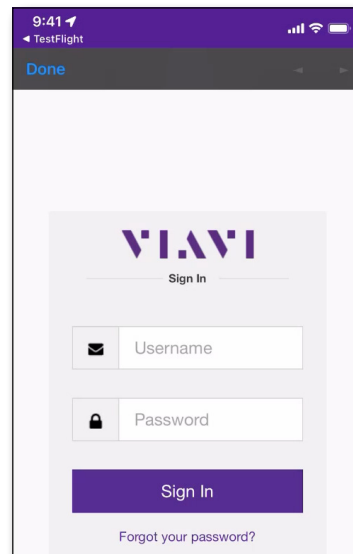
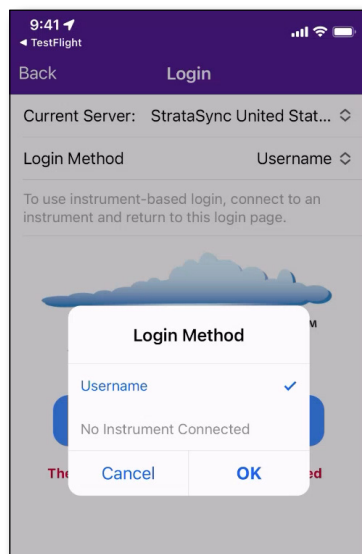
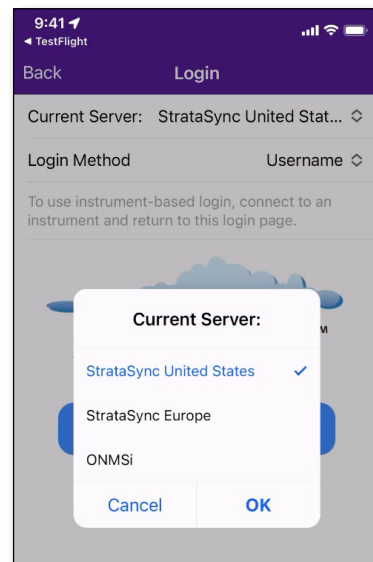
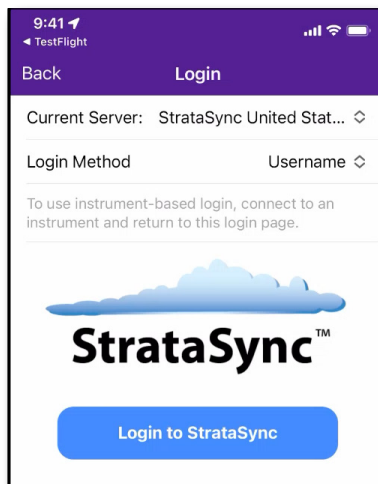
Pressing the 'X' in upper right corner of the pop-up will temporarily hide the pop-up until a subsequent launch of Mobile Tech – pressing **Do not show again** will permanently disable the pop-up.

To log in to StrataSync with username and password

1. Launch the **Mobile Tech app** on your mobile device.
2. Press the **Login to StrataSync** button in the pop-up. If you closed the pop-up:
 - Press the 3 dots in upper right corner of the app
 - Press **Login to StrataSync** at the top of the pullover



3. In **Current Server**, select your required StrataSync server (**United States** or **Europe**).
 4. In **Login Method**, select **Username**.
 5. Press the **Login to StrataSync** button.
 6. Enter your Username and Password, then press the **Sign In** button. The Mobile Tech Main menu will be displayed.
- If your meter is compatible, you can also log in with your instrument or transfer files in local mode.

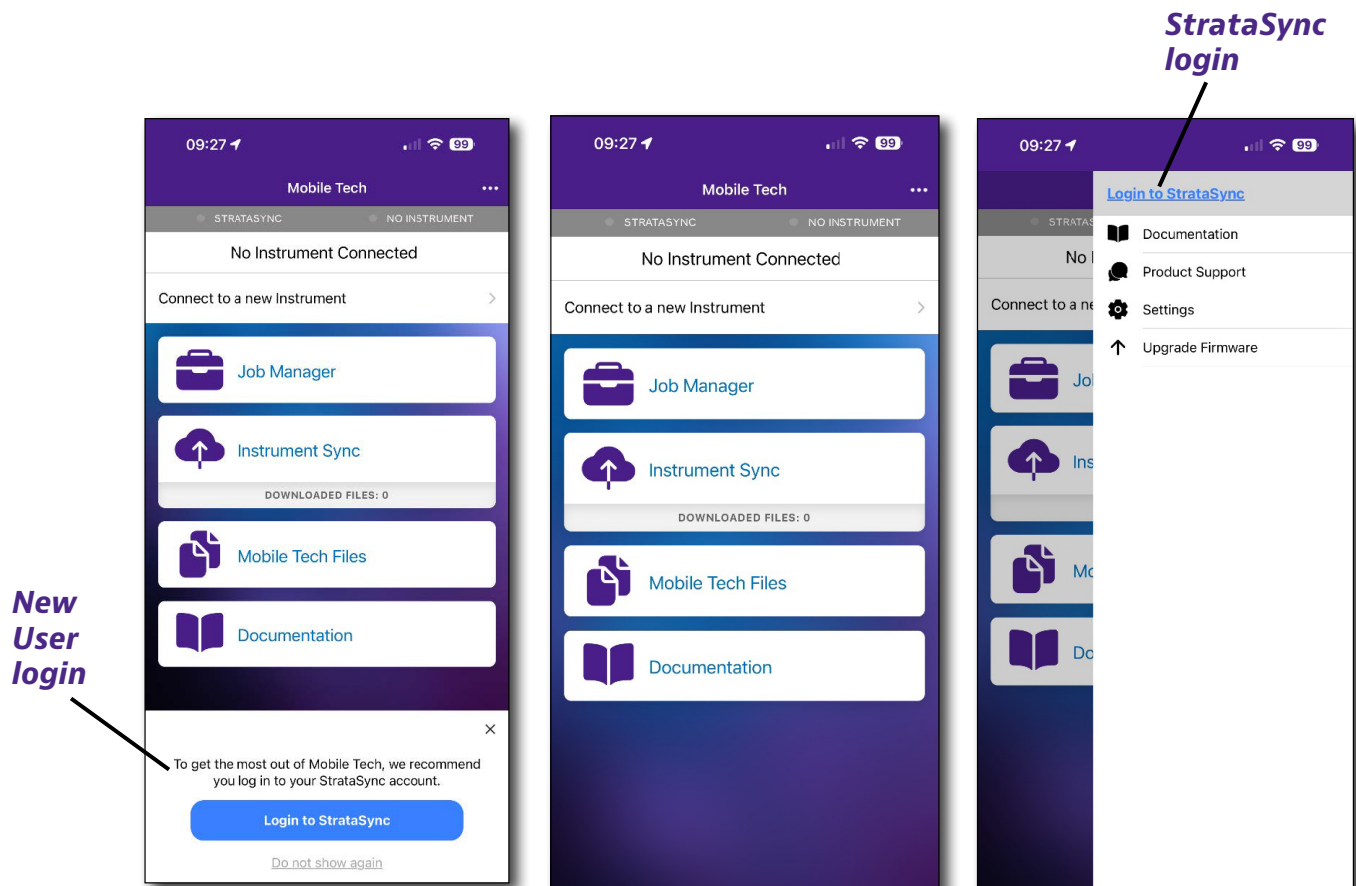


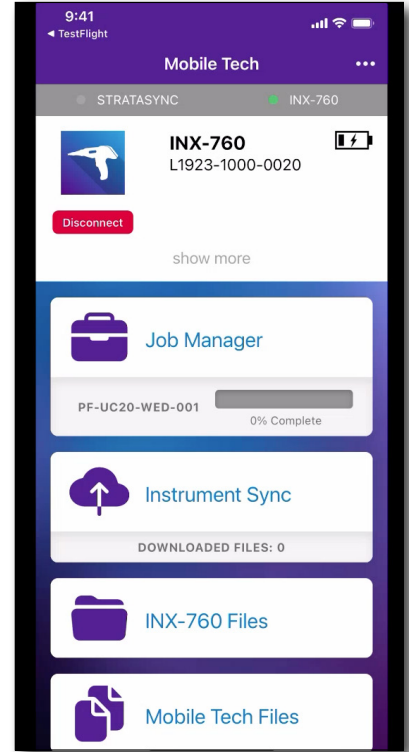
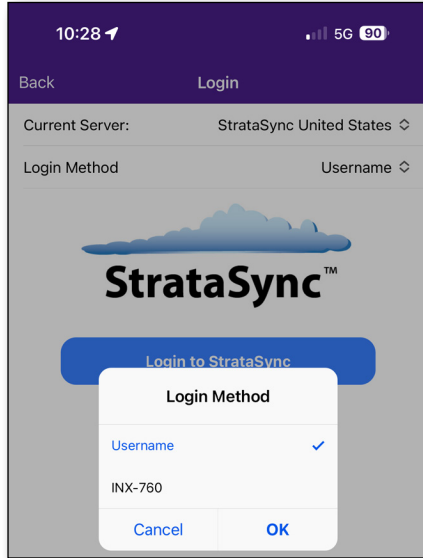
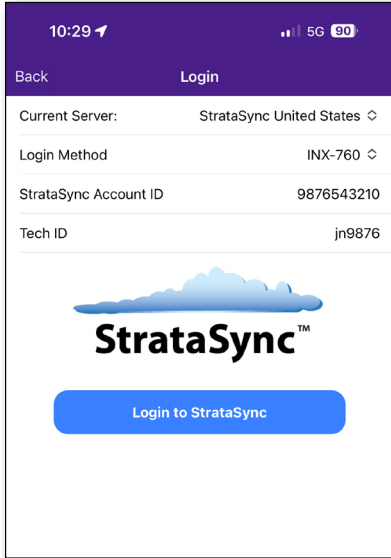
Using compatible VIAVI instruments, a Mobile Tech user can login to StrataSync using the connectivity details already provisioned into their VIAVI instrument (StrataSync Account ID and StrataSync Tech ID). There are several pre-requisites for this functionality:

- 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 Mobile Tech user must have a StrataSync user profile (and have "Login Enabled" set) present in the StrataSync customer account. The Tech ID of this StrataSync user profile is used by the instrument and Mobile Tech app (it is not required that the instrument is currently associated with this Tech ID in the StrataSync customer account).

To log in to StrataSync using your connected instrument

1. Launch the **Mobile Tech app** on your mobile device.
2. If not already connected to your VIAVI instrument, follow *"Connecting to VIAVI test instruments" on page 299* to connect to your instrument.
3. Press the **Login to StrataSync** button in the pop-up. If you closed the pop-up:
 - Press the 3 dots in upper right corner of the app.
 - Press **Login to StrataSync** at the top of the pullover.
4. In **Current Server**, select your required StrataSync server (**United States** or **Europe**).
5. If your meter is compatible with instrument based logged in, the **Login Method** should automatically change to the connected instrument product name. If needed, press **Login Method** and select the instrument name, then press **OK**.
6. Enter (or verify) your StrataSync Account ID.
7. Enter (or verify) your Tech ID.
8. Press the **Login to StrataSync** button. The Mobile Tech app Main menu will be displayed.





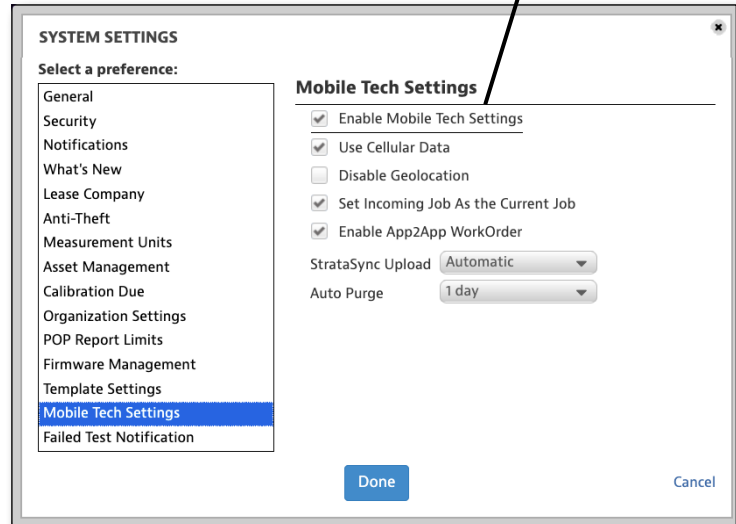
Mobile Tech centralized settings

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.

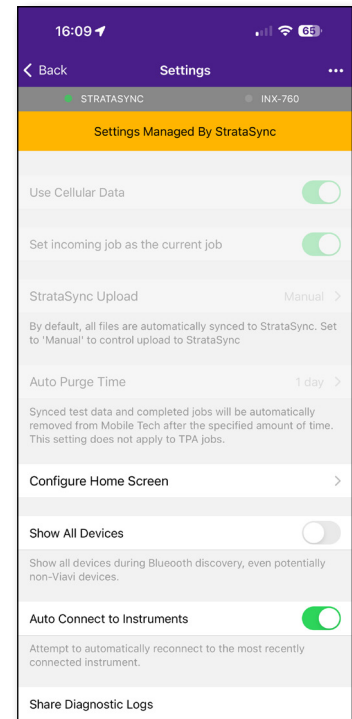
For more information, see *"Mobile Tech settings" on page 283*.

Enable Mobile Tech Settings



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:

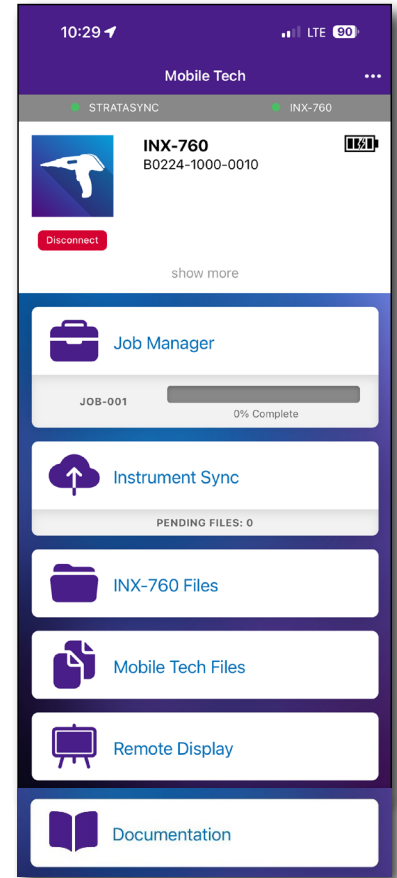


You must select the Login Enabled checkbox in the user profile under Access and Visibility for this feature to work. See "Editing user details" on page 188.

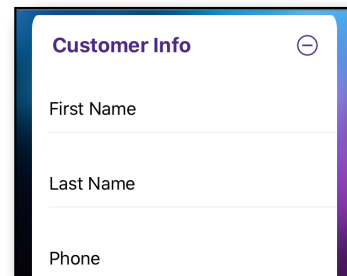
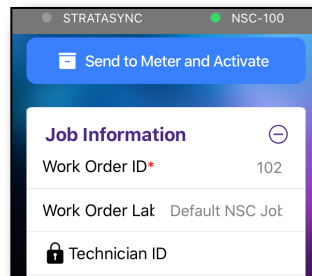
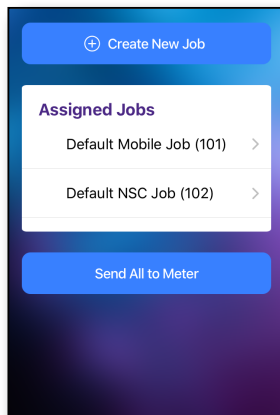
Mobile Tech overview

Once connected to a VIAIV instrument and logged into StrataSync, you will see the details of the connected instrument and be able to view jobs, 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.

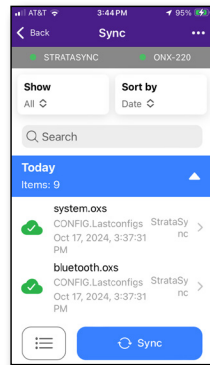
In the connected instrument section near the top of the app, you can click show more to see details on your instrument, including serial number, software version, installed options, and various other information as provided by the instrument.



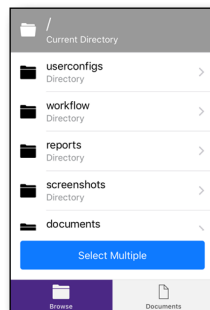
- **Job Manager** – View assigned jobs and job information, create jobs from job templates, track job progress and test results, attach additional tests or information to jobs



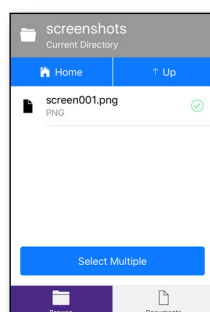
- **Instrument Sync** – View sync history of instrument with StrataSync, including uploaded test results and deployed instrument configuration files. Connected instruments will automatically sync with StrataSync by default; you can manually sync your instrument to StrataSync here as well



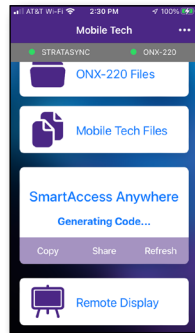
- **Instrument Files** – Instrument file manager where you can view test results and test configurations on the connected instrument, copy files from the instrument into Mobile Tech if desired for app2app sharing, or delete files from instrument



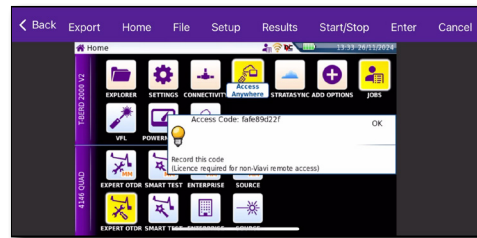
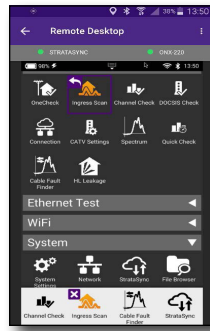
- **Mobile Tech Files** – Manage files that have been copied from an instrument into Mobile Tech locally



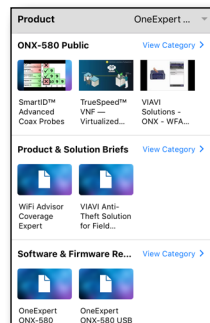
- **Smart Access Anywhere** – View or copy a Smart Access Anywhere (SAA) code from the connected instrument to share with colleagues or technical support for remote access to the VIAVI instrument. The VIAVI instrument must have a network connection to connect to SAA server



- **Remote Display** – View display and operate the connected VIAVI instrument (if supported by the instrument)



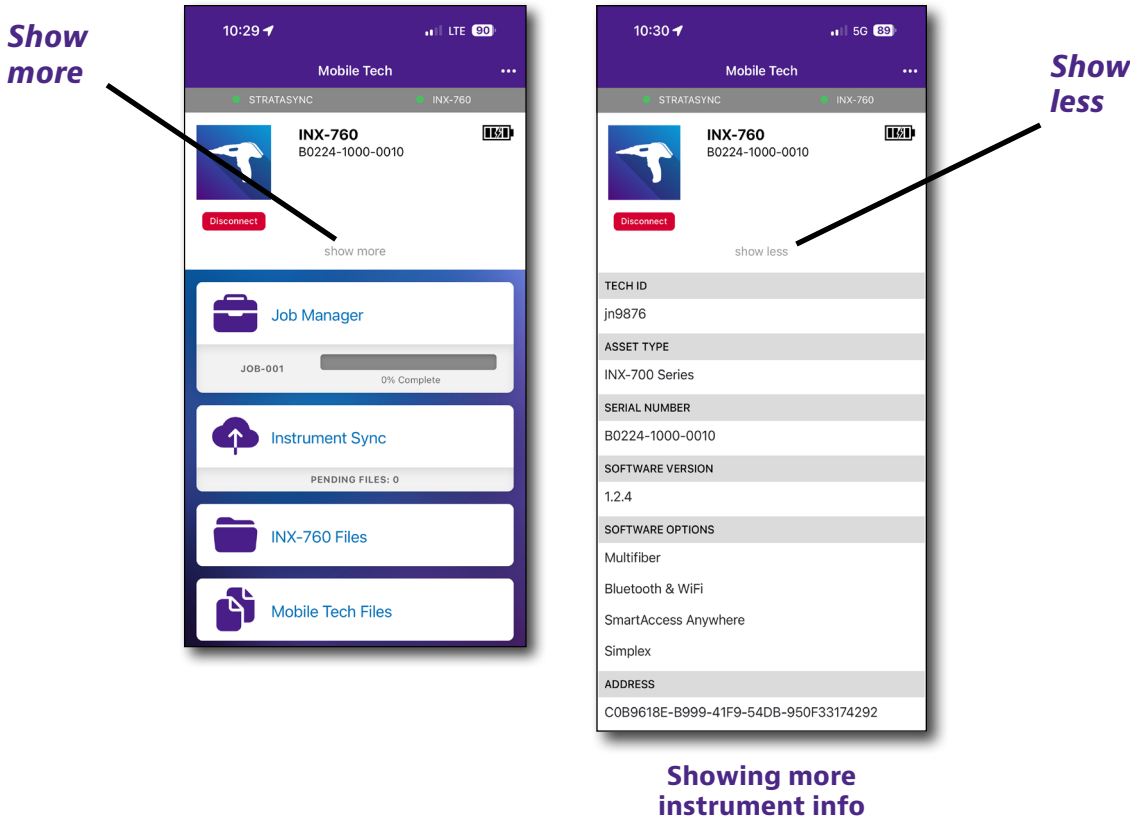
- **Documentation** – View and download various documentation for your instrument, including quick reference guides, how-to videos, applications notes, software release notes, etc.



Viewing connected VIAVI instrument information

The connected instrument is displayed in the top section/card on the main Mobile Tech app screen, including the instrument name, serial number and last sync date/time.

You can easily see more details about your VIAVI instrument, such as the software version, software options, etc. by selecting **show more** near the bottom of this connected instrument card. Scroll down to see more details. Select **show less** to collapse.



Updating the firmware from StrataSync

For VIAVI instruments that support upgrading firmware from StrataSync thru Mobile Tech app:

1. Connect the instrument to the power supply to ensure an uninterrupted supply of power during the update.
2. Connect the instrument to Mobile Tech.
3. If a firmware upgrade was pushed to your instrument from StrataSync, you will see a shortcut as **Upgrade Firmware** in the connected instrument information card. Select **Upgrade Firmware** to go to the Upgrade Firmware screen.

You can always get to the Upgrade Firmware screen by selecting the 3-dots icon in the upper right corner of Mobile Tech, and then selecting **Upgrade Firmware** from the pull over.

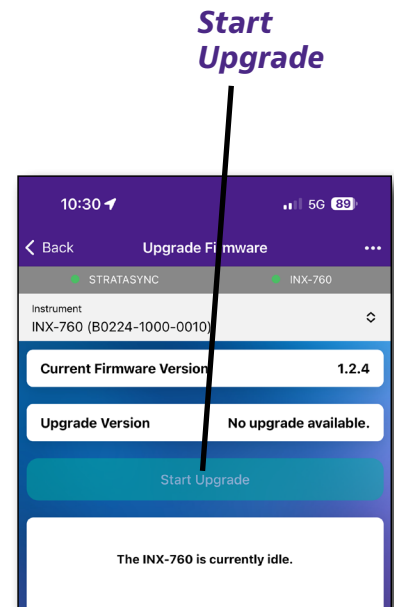
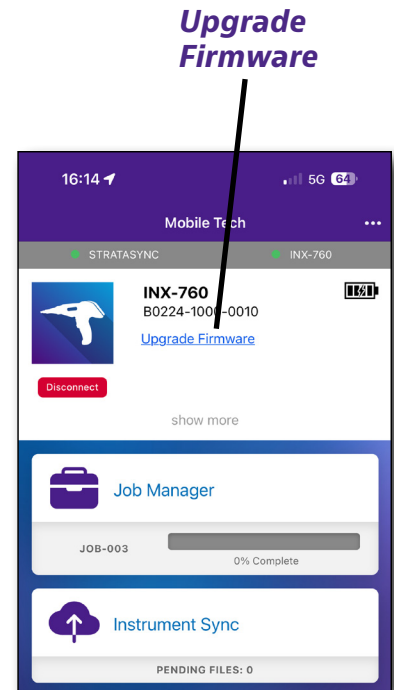
4. The Upgrade Firmware screen appears, showing the current firmware version and if an update is available. You can pull down on this screen to refresh and check if a firmware upgrade was assigned to your instrument.
5. If an update is available, select **Start Upgrade** to update the unit.

Note that some instruments, such as the NSC-200, will also require a connection to your network via wired Ethernet – this will be displayed in Mobile Tech and required before allowing you to press the **Start Upgrade** button.

6. The firmware will download from StrataSync into Mobile Tech first, then send to the instrument and the instrument upgrade will begin. Most VIAVI instruments will power off or reboot after the firmware upgrade is completed.

Please wait as this could take 10-15 minutes, based on the size of the update file and connection speed.

If you're in an area with poor cellular connectivity, you can connect your phone directly to a WiFi Access Point to have Mobile Tech download the instrument firmware and then connect to the instrument to begin upgrade.



Job Manager

You can use the Job Manager to view assigned jobs and job information, make jobs active/current, create jobs from job templates, track job progress and test results, attach additional tests or information to jobs.

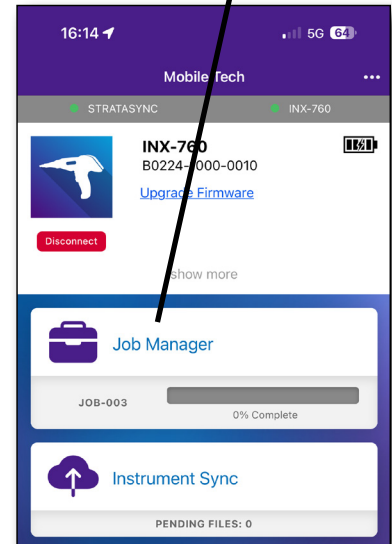
Jobs that are managed and assigned to you from StrataSync will automatically appear in your Job Manager Job List and automatically be removed once job is completed and approved, or if they are reassigned to another tech or deleted.

When logged into StrataSync, all tests and files associated with jobs will automatically be uploaded to StrataSync by default.

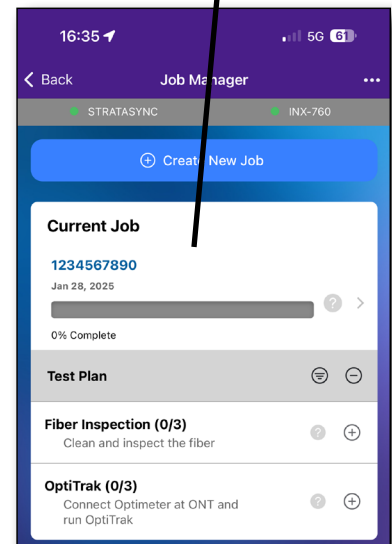
Managing jobs

1. From the Main menu, select **Job Manager**. The Job Manager screen appears. If you have an active job, it will be displayed at the top of the screen in the **Current Job** section.
2. Scroll down on the screen to see the **Job List** section which displays all of your assigned jobs. Use the filter or search field to quickly find a job, or you can scroll through the job list by swiping up to find a job.
3. You can perform quick actions on any job by swiping left or right:
 - Swipe right to quickly **Set As Current** (active) job, or
 - Swipe left to **Archive** the job. This will move the job into your archived jobs folder which can be accessed later at bottom of Job Manager screen with the **Show Archived Jobs** button.

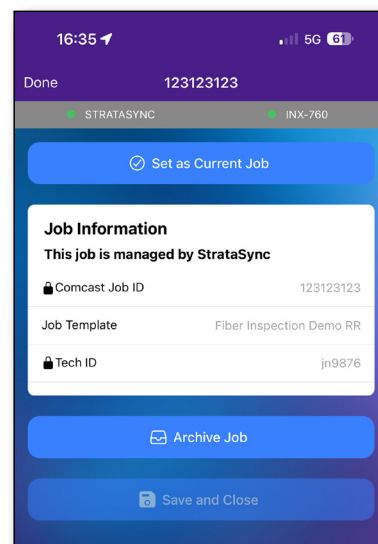
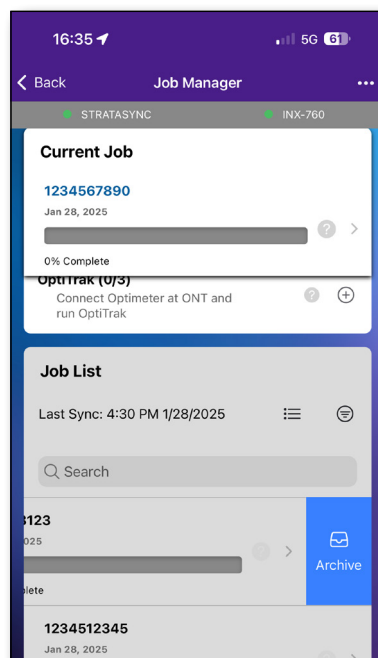
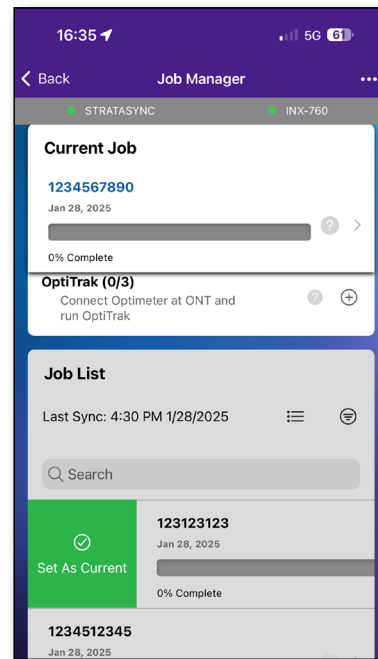
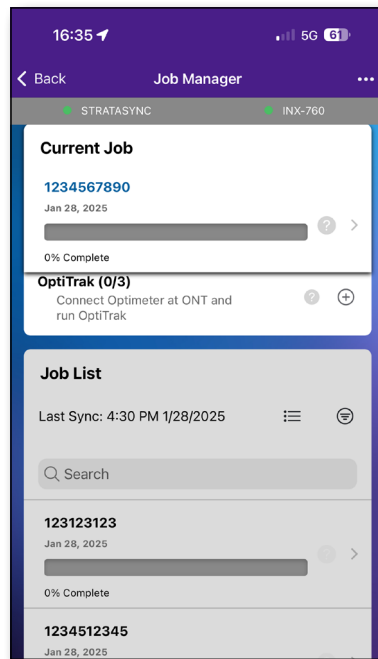
Job Manager



Current job



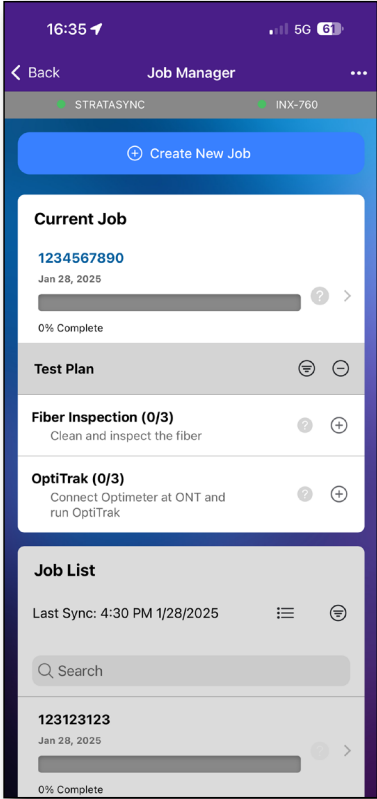
4. Click on any job to view the job details and test plan. Depending on the job attributes fields, you may be able to edit or add information in the job details. You will see buttons to:
 - **Set as Current Job** at top of screen which will make that job the current/active job.
 - **Archive Job** to move the job to Archived Jobs list.
 - **Save and Close** to save job information and return to the Job Manager screen.



Current job

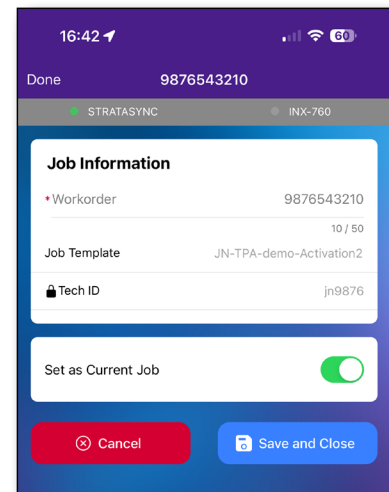
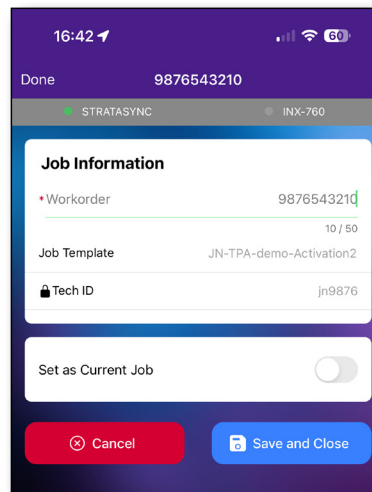
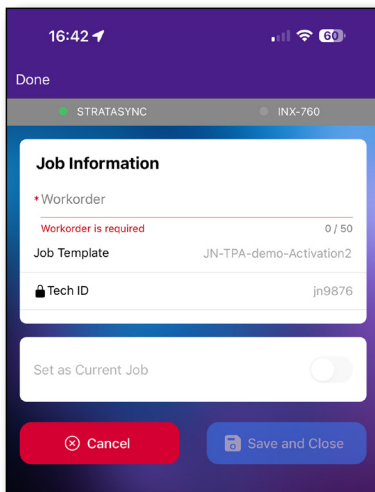
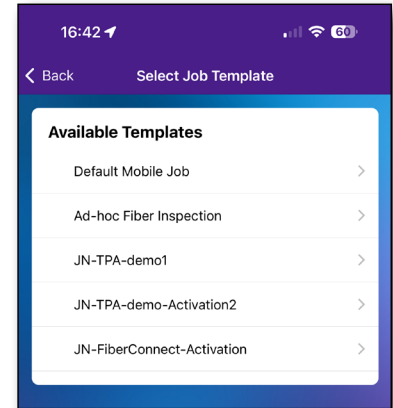
Current Job is displayed at the top section of Job Manager screen where you can easily see the overall job progress, as well as the complete test plan which is comprised of required and optional tests or tasks to be performed.

You can expand or collapse the test plan steps to see each test step and associated test locations. Completed test steps that are passing will have a green checkmark and those that are failing will have a red x.



Creating a job

1. From the **Main** menu, select **Job Manager**. The Job Manager screen appears.
2. Select **Create New Job** at the top.
3. A list of available job templates will be displayed. Select the job template that's required for your job and the Job Information screen appears.
4. Enter the job information in each required and optional job attributes fields that are defined by the job template.
5. Select **Set as Current Job** toggle if you want to set the job as the current job.
6. When finished, select **Save and Close** at the bottom.
7. The job will be added to the jobs list (and set as the current job, if enabled). The status of the job is also shown under Job Manager on the Mobile Tech main menu.

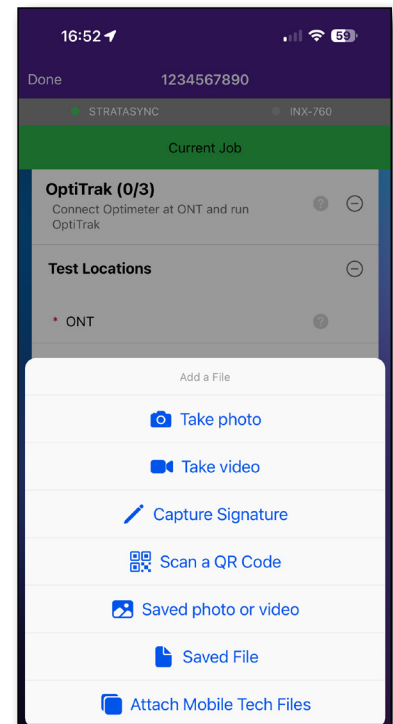


Adding job files

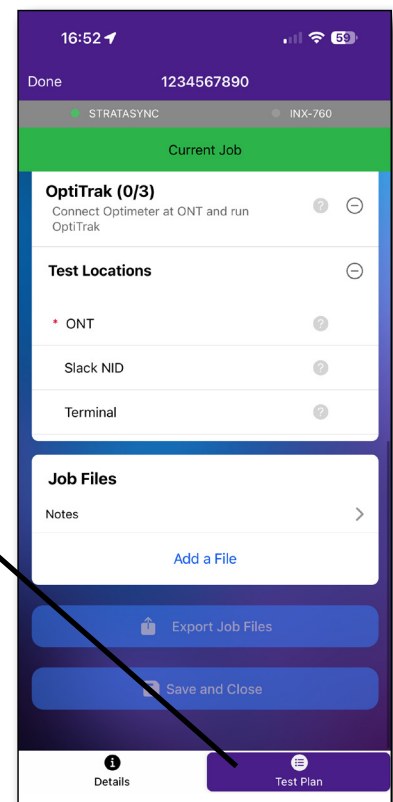
You can add job files to the current job, including any file from your mobile device or files saved in the Mobile Tech files.

1. From the Job Manager screen, select the active or assigned job you want to add files or notes.
2. Select the **Test Plan** tab at the bottom.
3. Under Job Files, select **Add a File**, then choose from the available options (ie. **Take photo**, **Take video**, **Capture Signature**, **Scan a QR Code**, **Saved photo or video**, **Saved File**, or **Attach Mobile Tech Files**) and complete required action to add the file to the Job Files section.

You can also add **Notes** here, if needed.



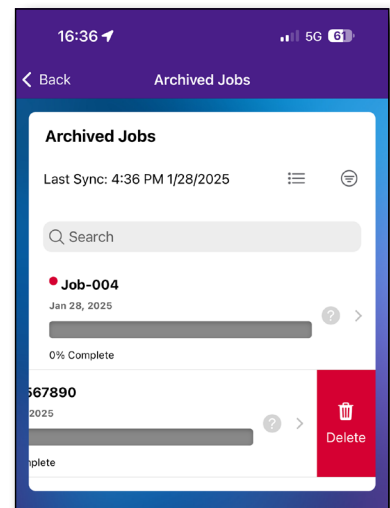
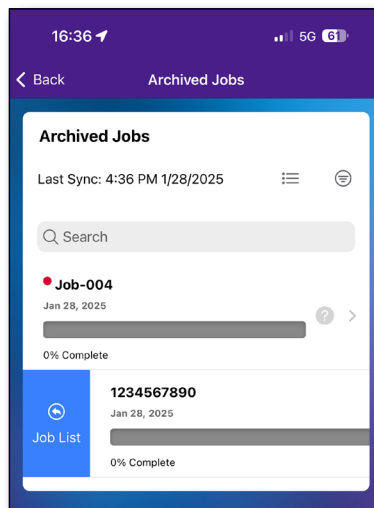
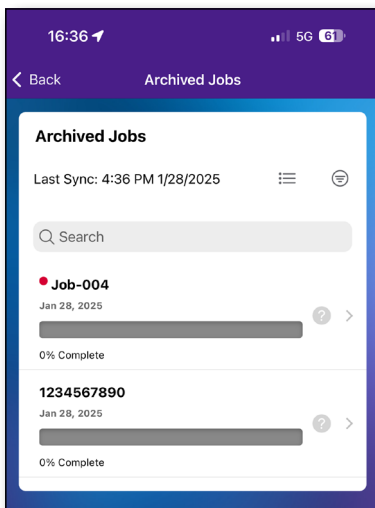
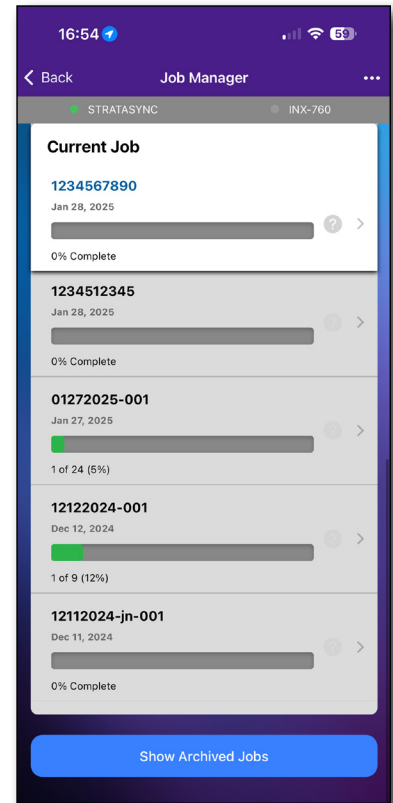
*Test Plan
tab*

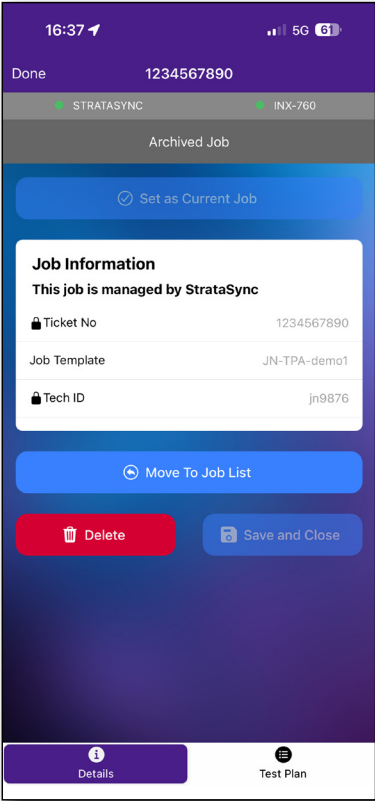


Archived Jobs

You can archive jobs when you're completed or have no plans to perform additional work on jobs, which will help to minimize your job list for easy viewing.

1. You can view and manage archived jobs at any time by:
2. From the Job Manager screen, scroll to bottom of screen and select the **Show Archived Jobs** button.
3. You will now see the **Archive Jobs** list where you can:
 - Click on a job to see the job details and test plan
 - Swipe right to return job to **Job List**
 - Swipe left to **Delete** job





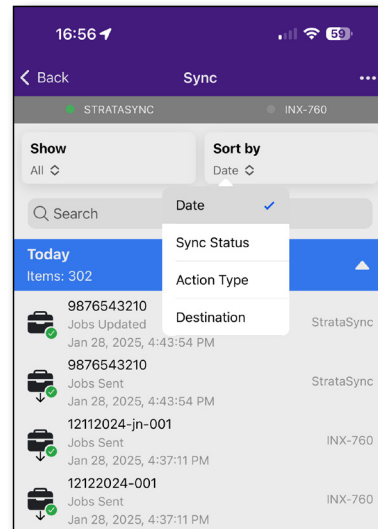
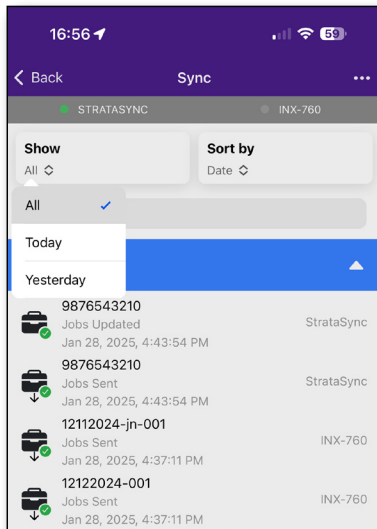
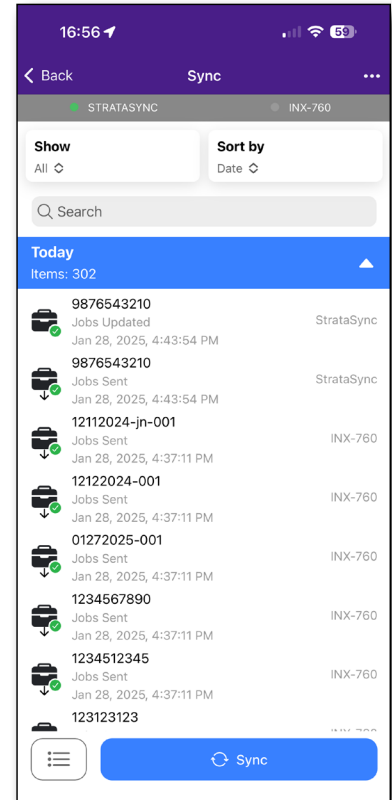
Instrument Sync

The Instrument Sync section allows you to view sync history of instrument with StrataSync, including uploaded test results and deployed instrument configuration files. Connected instruments will automatically sync with StrataSync by default; you can manually sync your instrument to StrataSync here as well.











1. From the Main menu, select **Instrument Sync**. The StrataSync Sync menu appears.
2. Use the filter fields (**Show** and **Sort by**) or Search bar at top of Instrument Sync screen to easily find status of specific job or test files.

Note that the **Show** field depends on the selection in the **Sort by** field (e.g. date, sync status, action type, destination, etc).

3. You can manually force a sync between Mobile Tech app, the instrument and StrataSync by pressing the **Sync** button.



Sync icons

General		• Pending Sync – Files that have not yet been sent to StrataSync or files that are waiting to deploy to an instrument
		• Synced – Files that have been sent to StrataSync. A green check indicates success
		• Deployed – Files that have been sent from StrataSync to an instrument. The label on the right indicates the destination
Jobs		• Job Updated – A job that was already sent to Mobile Tech that has been updated by StrataSync or an instrument
		• Job Received – A job that was sent to Mobile Tech. The label on the right shows the original source of the job
		• Job Sent – A job that was sent from Mobile Tech to another destination. The label on the right indicates the destination
		• Job Removed – A job that was removed from Mobile Tech during a sync
Templates		• Template Received – A template that was sent to Mobile Tech. The label on the right shows the original source of the template
		• Template Sent – A template that was sent from Mobile Tech to another destination. The label on the right indicates the destination
		• Template Removed – A template that was removed from Mobile Tech during a sync

Instrument Files

Use the instrument file manager to view test results and test configurations on the connected instrument, copy files from the instrument into Mobile Tech if desired for app2app sharing, or delete files from instrument.

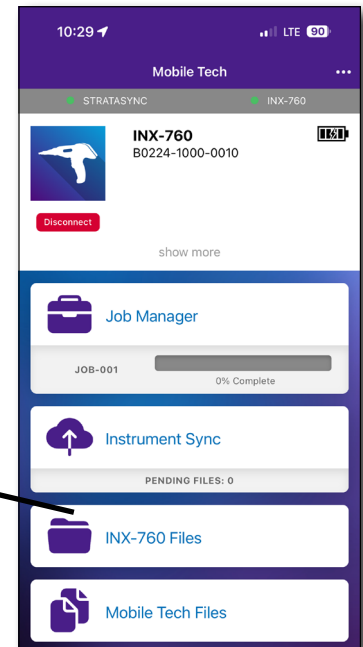
Files and structure depend on what the connected instrument supports and shares with Mobile Tech.

1. From the Main menu, select **Instrument Files** (for this example, we'll use INX-760). The File Manager screen appears, showing the Current Directory.

Here you will see the following directories:

- Reports
- Screenshots
- Templates
- Workflow

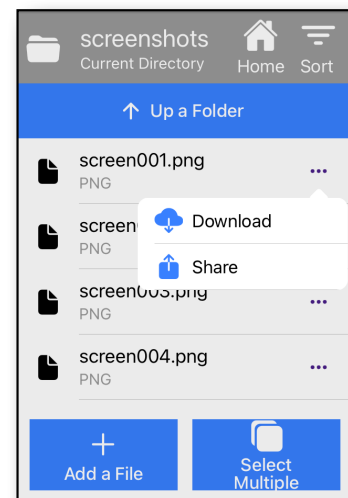
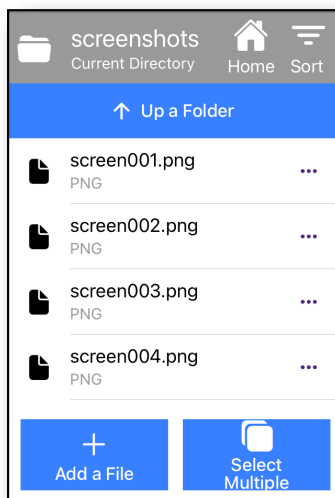
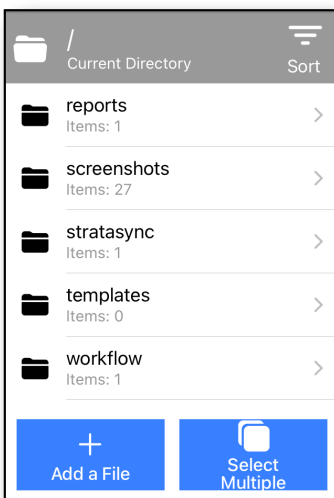
INX-760 Files



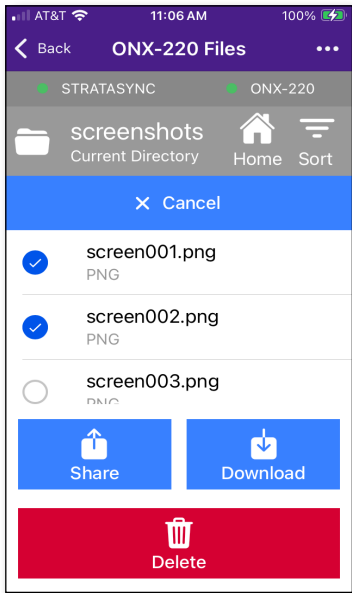
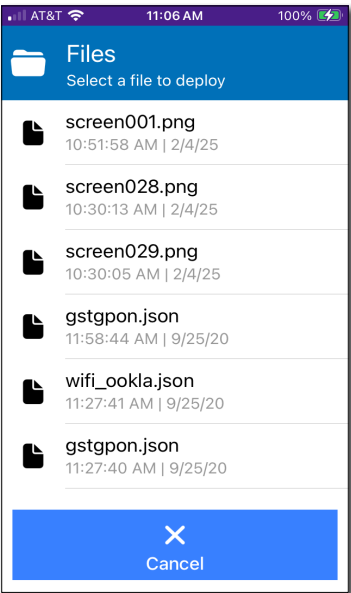
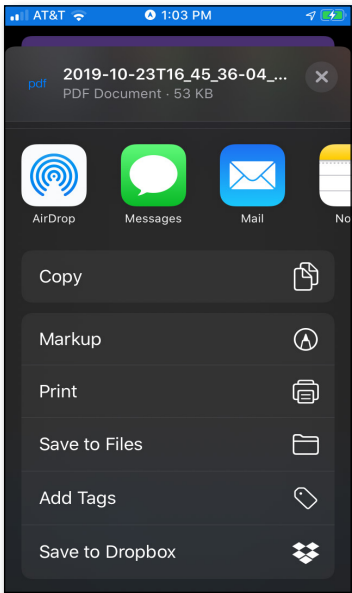
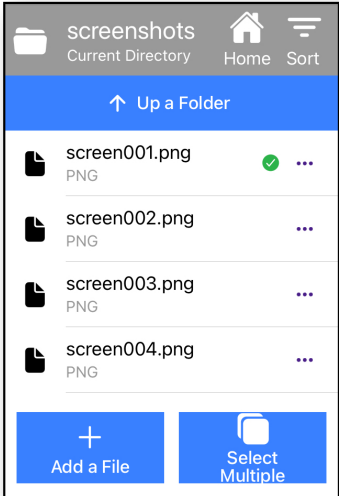
2. Select the directory you want to open. The directory will open and show a list of files.

To return to the main menu at any time, select **Home** at the top. You can also go up a folder directory by selecting **Up a Folder**.

- To download a file to your mobile device or share to another app, press the three dots to the right of the file. From the dropdown, choose **Download** or **Share**.



- Once the file is downloaded, it will change to a green checkmark.
Files and reports will then be saved to the **Mobile Tech Files** menu. For more info, see the next section.
- To share to another app, choose the app you want from the pop-up.
- To delete a file, select the file and swipe to the left. Then select **Delete**.
- To add a file to the meter, press the **Add a File** button at the bottom, then choose which file from the local files on your mobile device you want to send to the meter.
- To select multiple files, press the **Select Multiple** button at the bottom, and select the files. Then select **Share**, **Download**, or **Delete**.



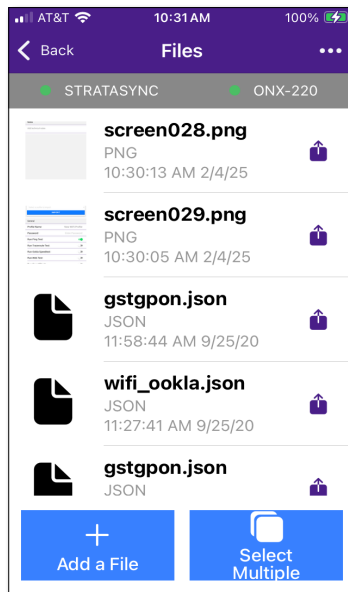
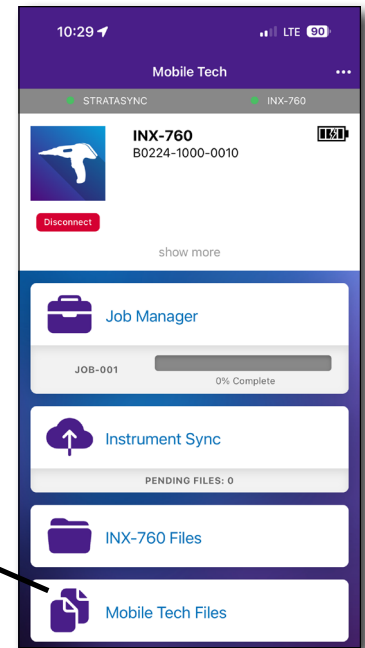
Mobile Tech Files

Use the **Mobile Tech Files** menu to manage the files on your mobile device, deploy to the OneExpert, upload to StrataSync, or export to another app on your device, such as text or email.

When you download files and reports from the OneExpert to save to your device, they will appear here.

1. From the Main menu, select **Mobile Tech Files**. Mobile Tech Files screen appears, showing the list of files on your mobile device.

Mobile Tech Files



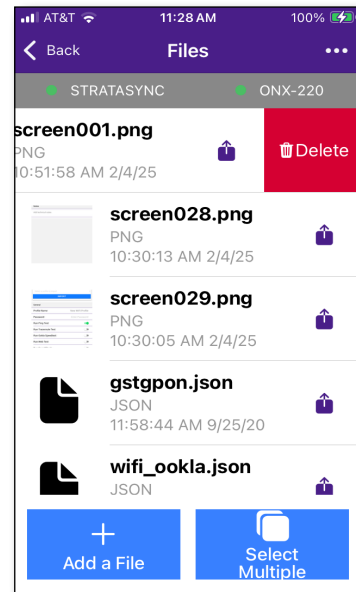
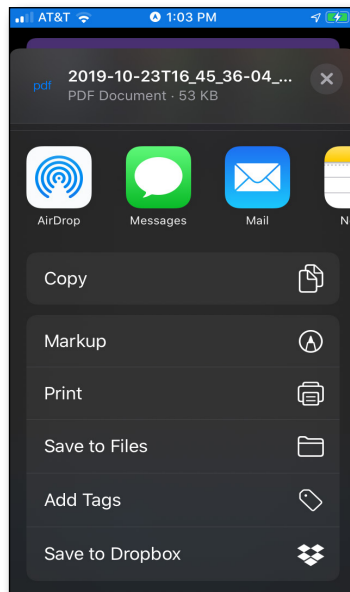
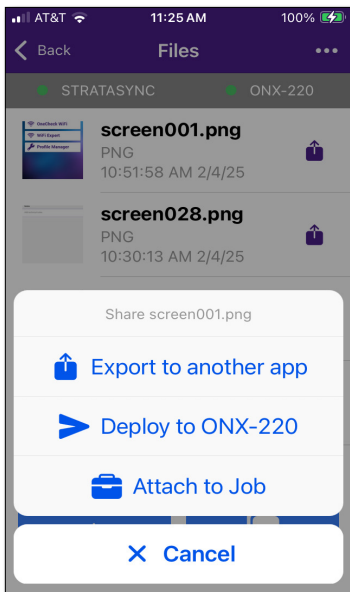
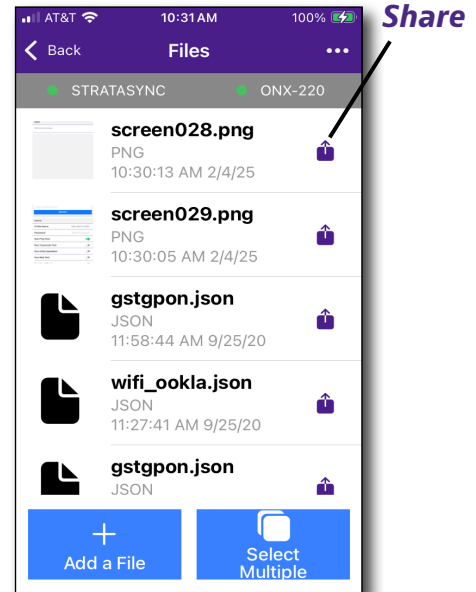
2. Select **Share** to the right of the file you want to send. A pop-up will appear with the following options:

- Export to another app
- Deploy to Instrument
- Attach to Job

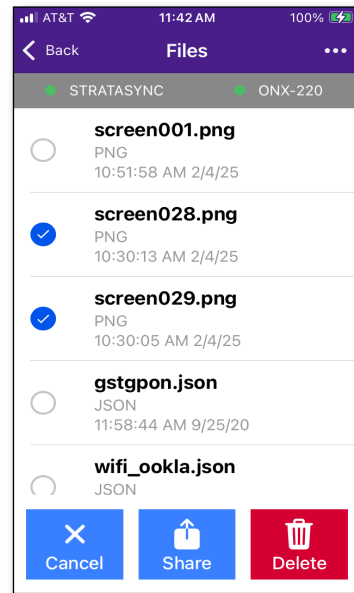
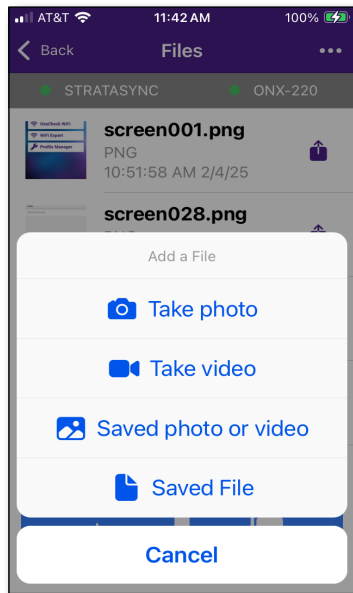
To return to the Main menu at any time, select **Back** in the upper left.

3. Choose the option you want. To export to another app, choose the app you want from the pop-up.

- To delete a file, select the file and swipe to the left. Then select **Delete**.



- To add a photo or video to the meter, press the **Add a File** button at the bottom, then choose **Take photo**, **Take video**, **Saved Photo or video**, or **Saved File**.
- To select multiple files, press the **Select Multiple** button at the bottom, and then select the files. Then select **Share** or **Delete**.



SmartAccess Anywhere

Smart Access Anywhere (SAA) allows secure, remote assistance for field techs directly on their instrument from a product or technical specialist in another location, including a central office or even another job site.

With Smart Access Anywhere (SAA) users can:

- Maximize experts' time to remotely coach less experienced personnel in the field
- Remotely control instruments minimizing time spent inside customer premises
- Access remote instruments without driving out to their location

Using a laptop, tablet or smartphone, an instrument can be remotely controlled in order to verify correct instrument/test configuration and to launch, view, and analyze results in real-time.

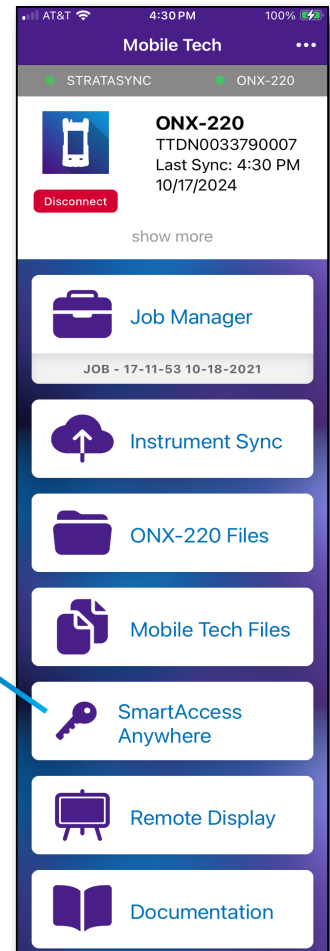
For client downloads and more information, see:

<https://www.viavisolutions.com/en-us/products/smart-access-anywhere-saa>

<https://www.viavisolutions.com/en-us/software-download/smart-access-anywhere-saa-software>

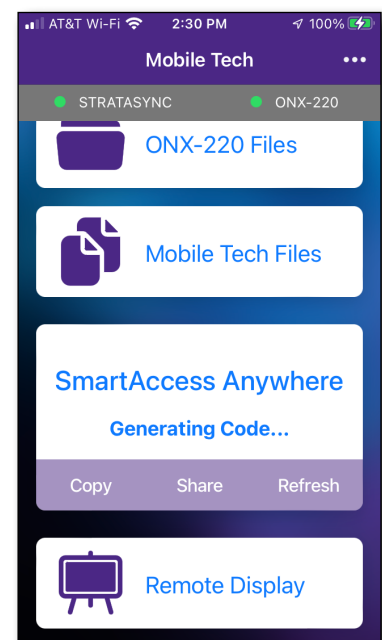
VIAMI provides links to Android and PC only. You can find the iOS version in the Apple App store.

SmartAccess Anywhere



Generating an SAA Code

1. From the Main menu, select **SmartAccess Anywhere**. The SmartAccess Anywhere screen appears.
2. Select **Generate Code**. After a few seconds, a code will be generated.
3. At the bottom, select **Copy** or **Share** to share with another application, such as text or email.
If you need a new code, select **Refresh**.
4. Share the SAA code with your product or technical specialist to remotely connect to your unit.

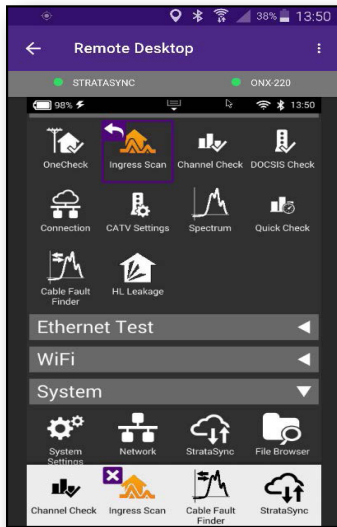


Remote Display

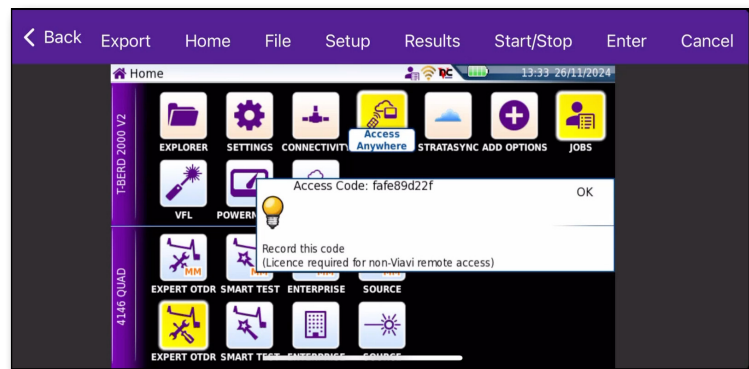
Once your instrument is paired to the Mobile Tech app (and the VIAVI instrument is supported for remote display), you can connect to it remotely to configure and run tests.

See the *User Guide* for your instrument for details.

From the Main menu, select **Remote Display** to get started.



ONX-220, connected remotely



TBERD 2000, connected remotely

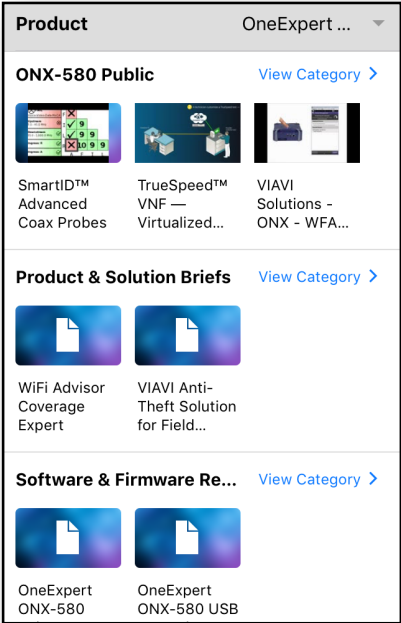
NOTE:



You need to enable Remote Operation to remote control the meter through the VIAVI Mobile Tech app. See the *User Guide* for your instrument for details.

Documentation

View and download various documentation for your instrument, including quick reference guides, how-to videos, applications notes, software release notes, etc.



Appendix

This appendix includes supplemental information for StrataSync, including the following:

- "Technical assistance" on page 332
- "Additional information" on page 332

Technical assistance

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

Outside US: +1-855-275-5378

Email: TAC@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 TAC@viavisolutions.com for these additional documents.

StrataSync Quick Start Guide

StrataSync Software Release notes (including system requirements)



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