# Cloud Services

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

## User Guide

## Notice

Every effort was made to ensure that the information in this manual was accurate at the time of printing. However, information is subject to change without notice, and VIAVI reserves the right to provide an addendum to this manual with information not available at the time that this manual was created.

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# Contents

# 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**

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# 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

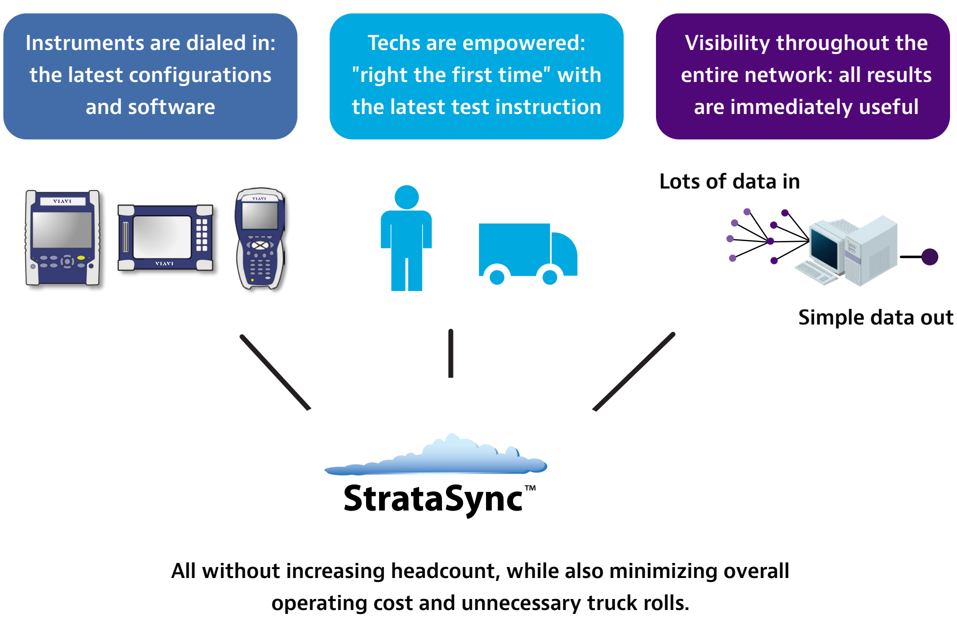
# About the StrataSync System

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.



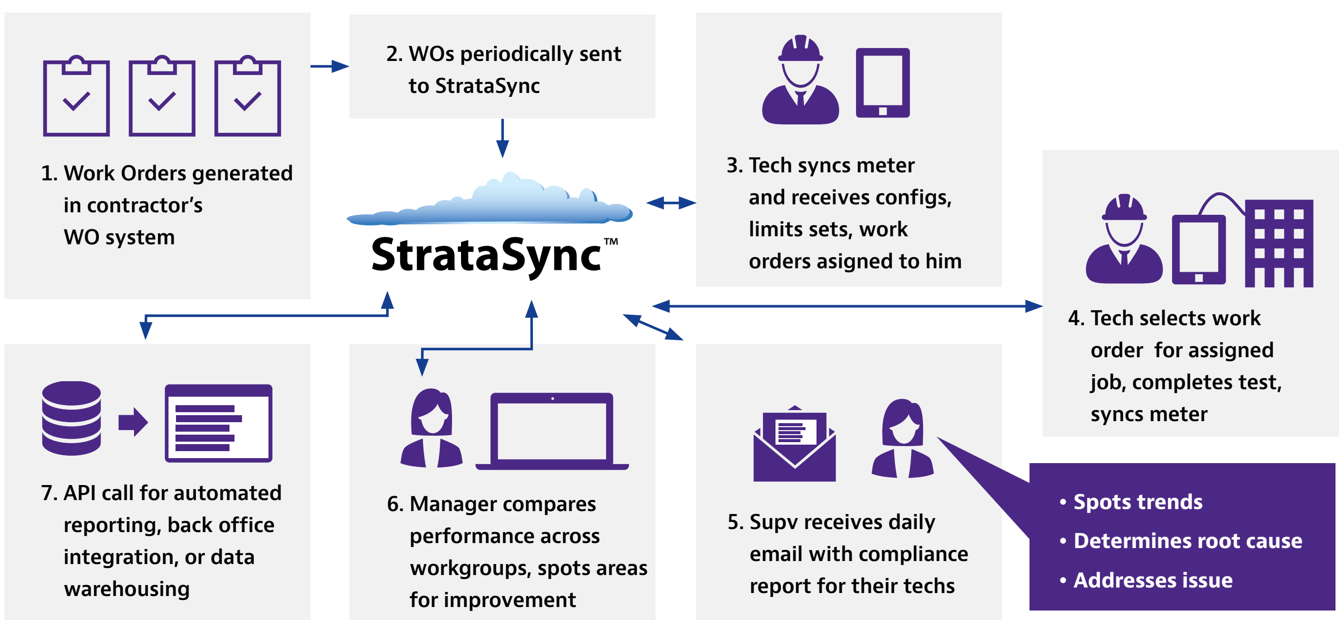
## Asset management

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.

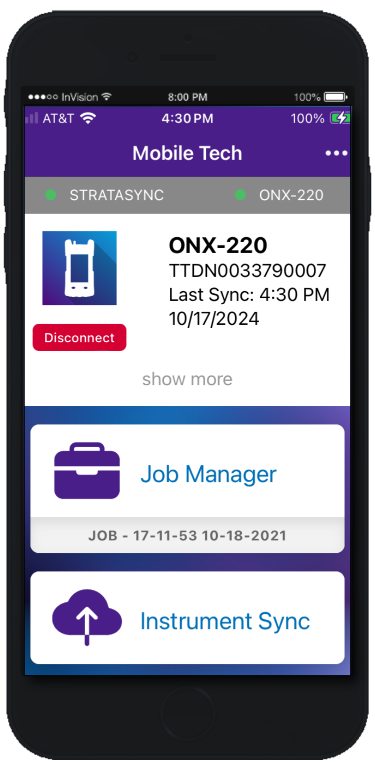
In this guide, we'll use the ONX-220 as the instrument paired to Mobile Tech. For more details, see the *User Guide* for your instrument.

# 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.

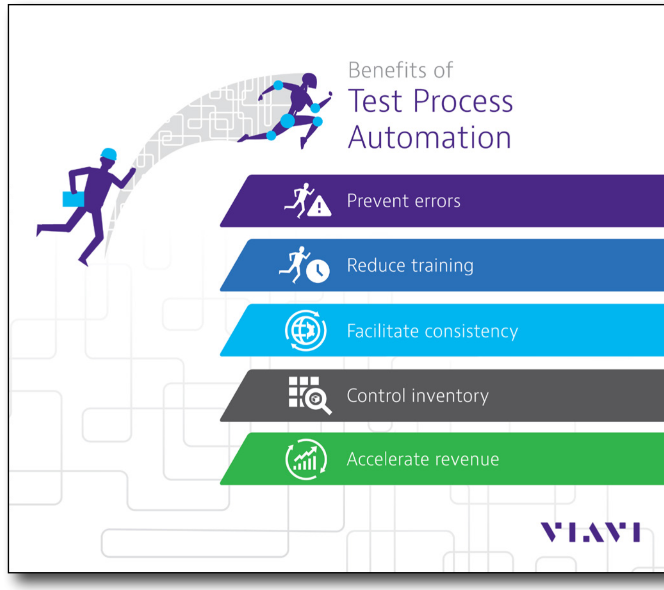


# About Test Process Automation (TPA)

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.

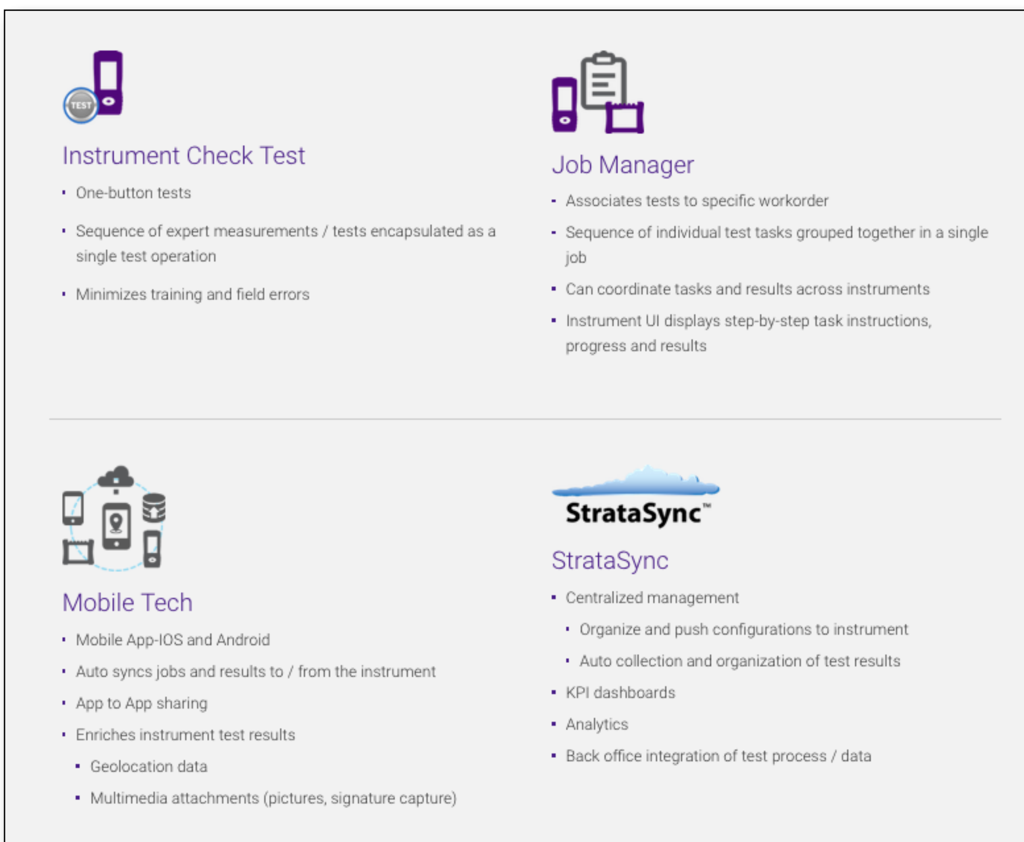



## TPA features

- **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



## 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.

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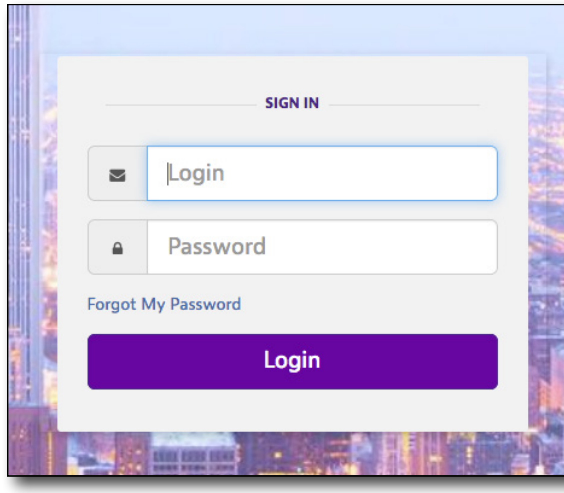
# Getting Started

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

# 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**

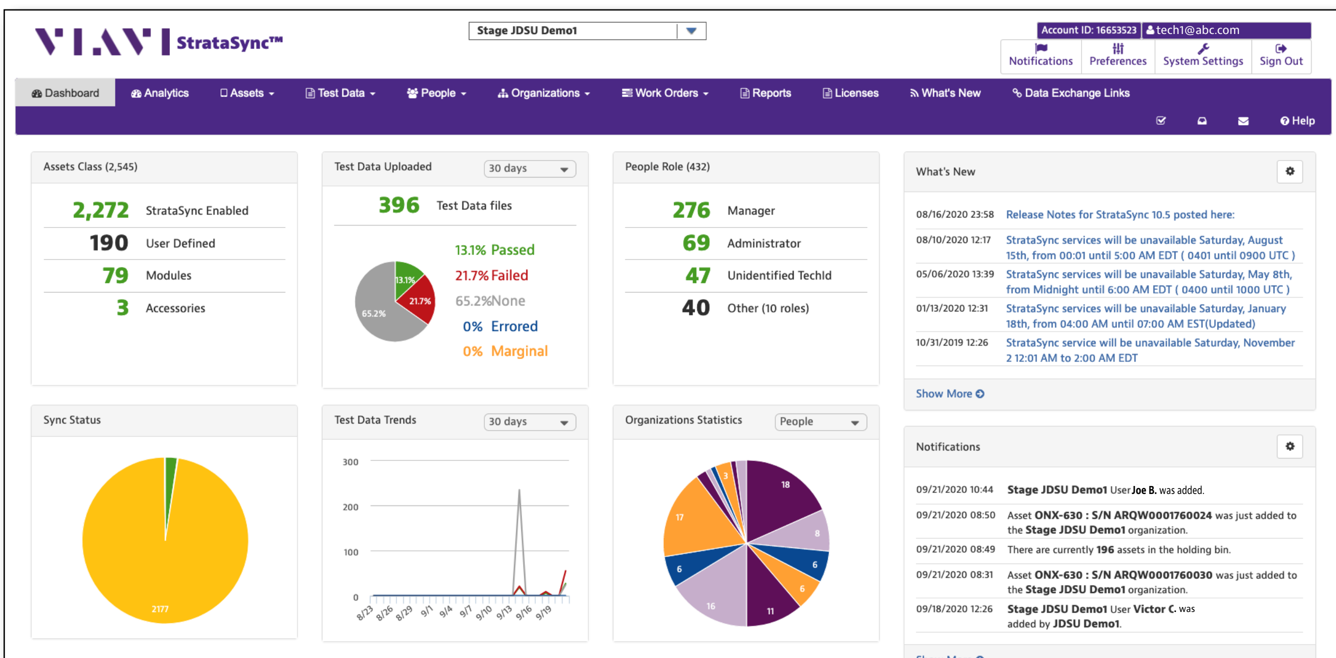
**EU: https://eu.stratasync.viavisolutions.com**

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.

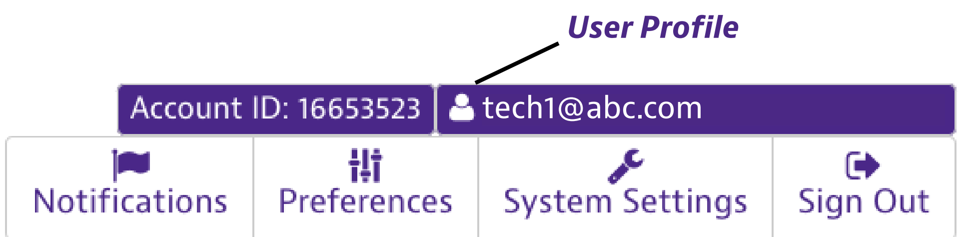



**StrataSync Main Dashboard**

# 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.



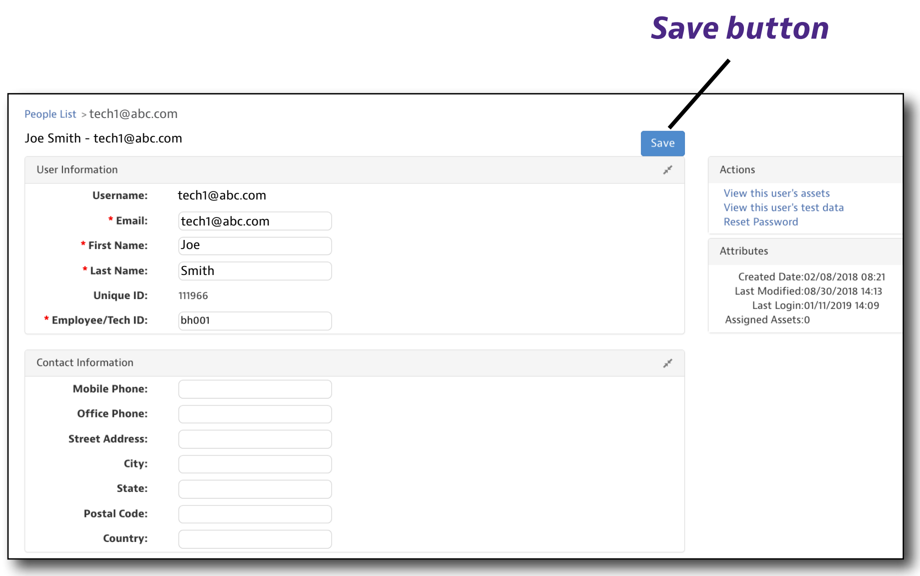

**User Profile in the Main toolbar**

## User profile

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

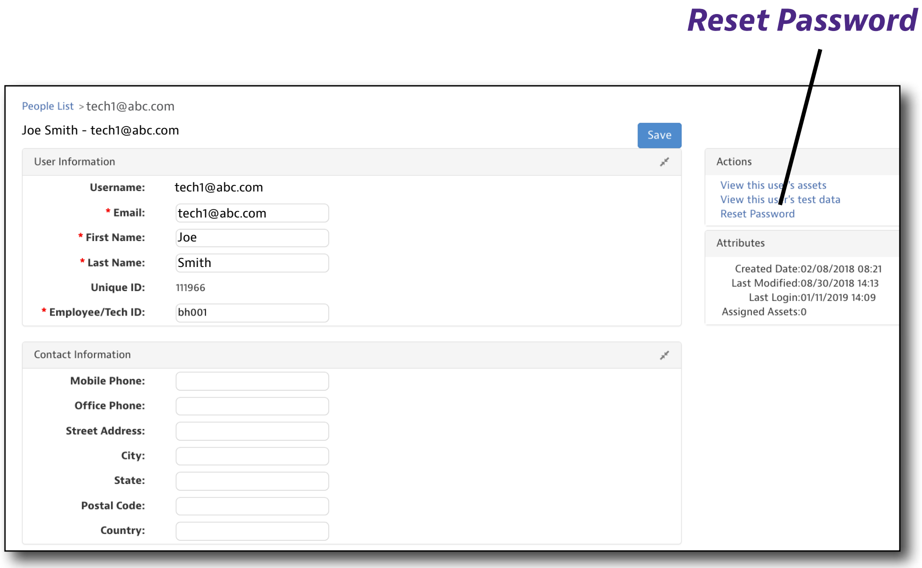
You can even view your assets and test data from here.

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

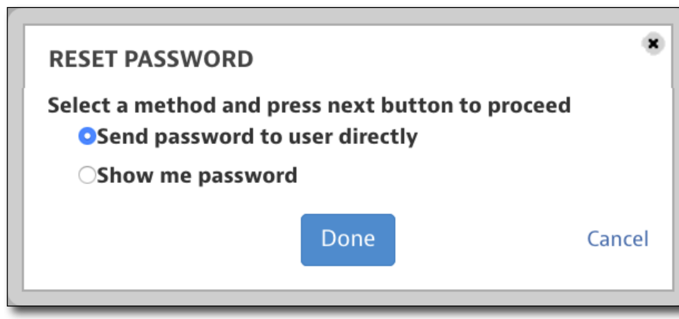


### *Reset password*

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



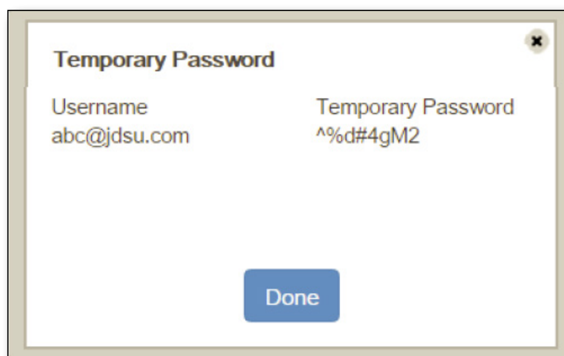

From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.




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*

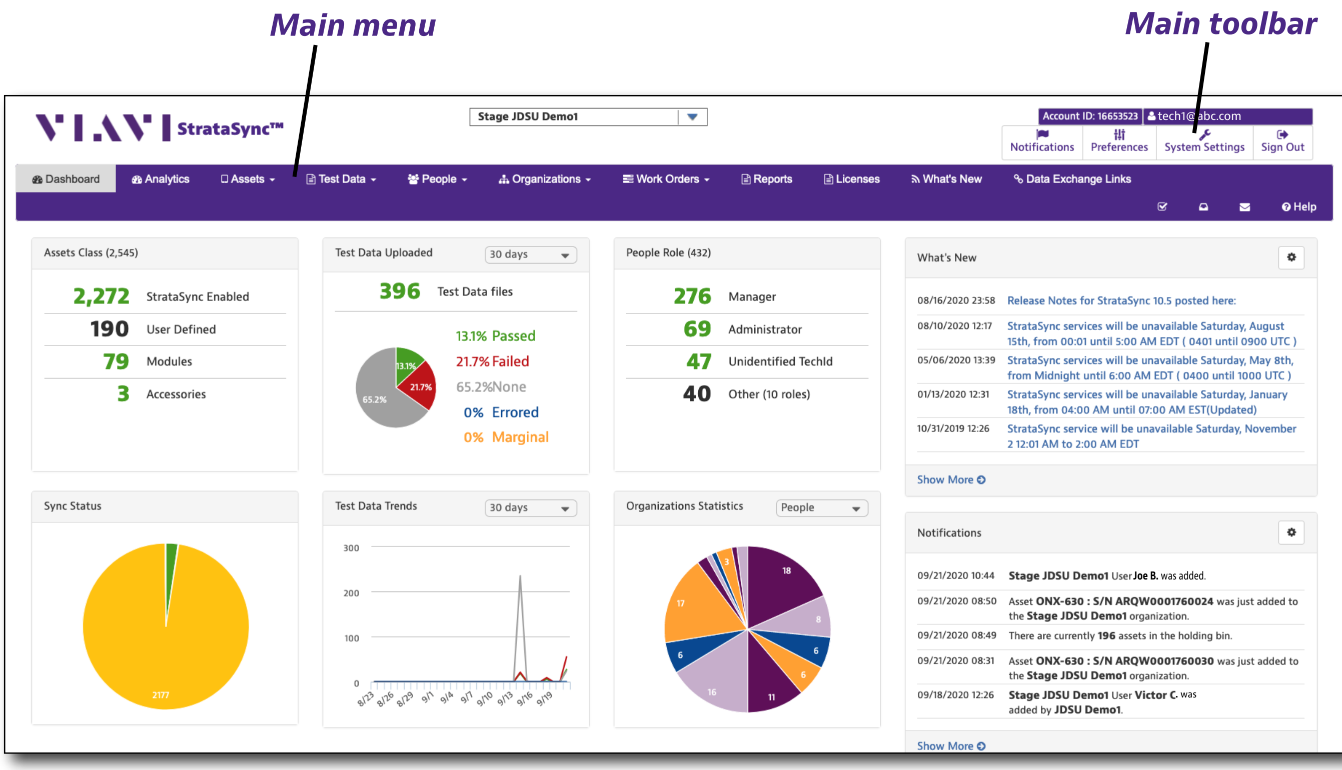



If you need help changing your password, contact your StrataSync Administrator.

# Setting up StrataSync

For more detailed information on configuring and managing the system for administrators, see *"Configuration" on page 271*.

# StrataSync visual overview

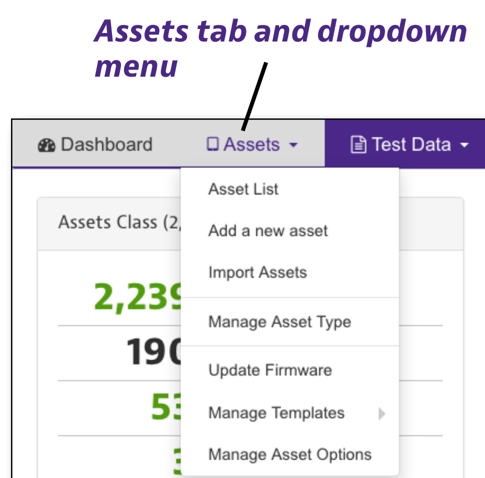



**StrataSync Main Dashboard**

## 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



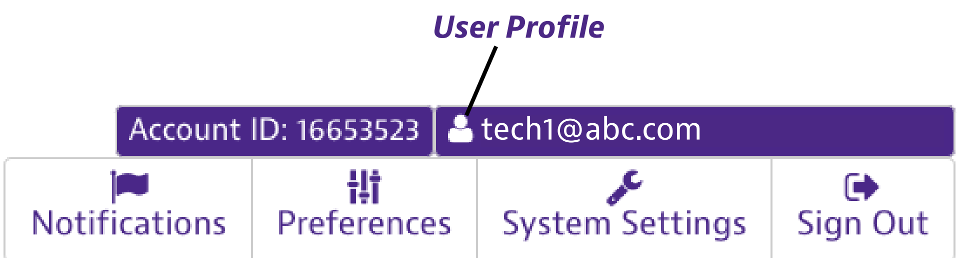

Select the tabs within the Main menu to open dropdown menus to navigate between the **Main Dashboard** (home page), **Analytics**, **TPA**, **Assets**, **Test Data**, **People**, **Organizations**, **Work Orders**, **Reports**, **Licenses**, **What's New**, and **Data Exchange Links** screens.

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.

> ***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.

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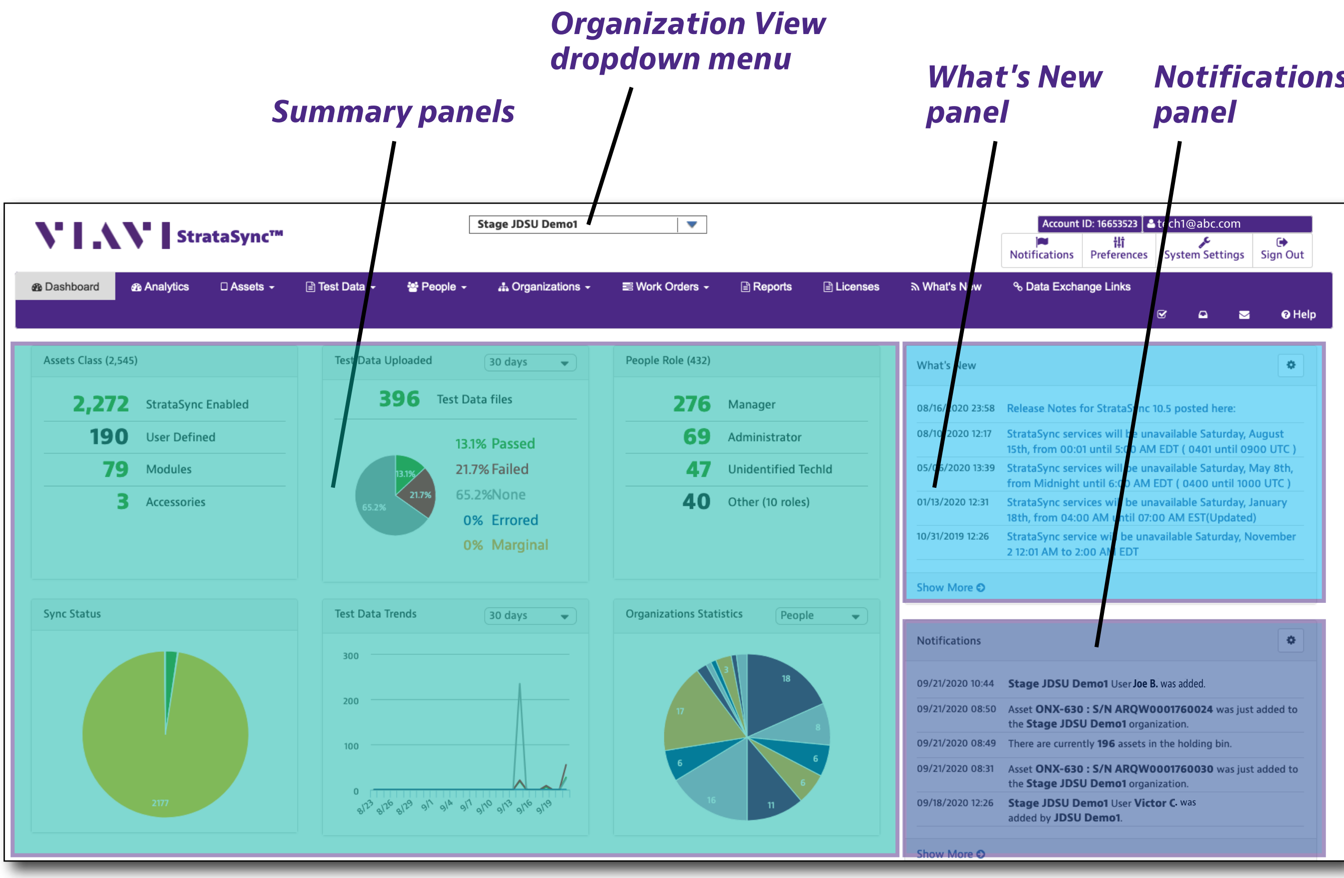
# StrataSync Basics

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

# 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.***

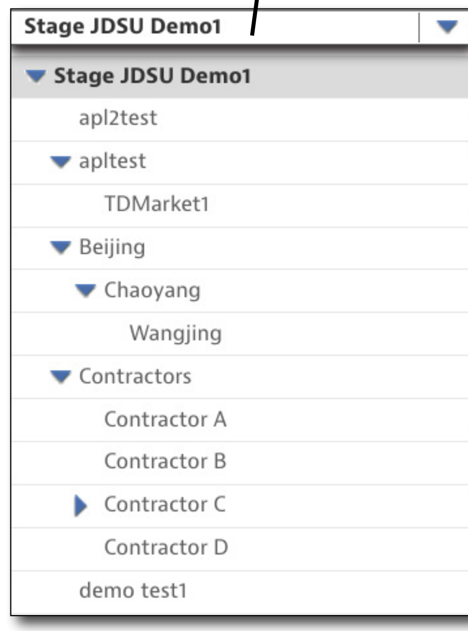
## Changing the Organization View

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***



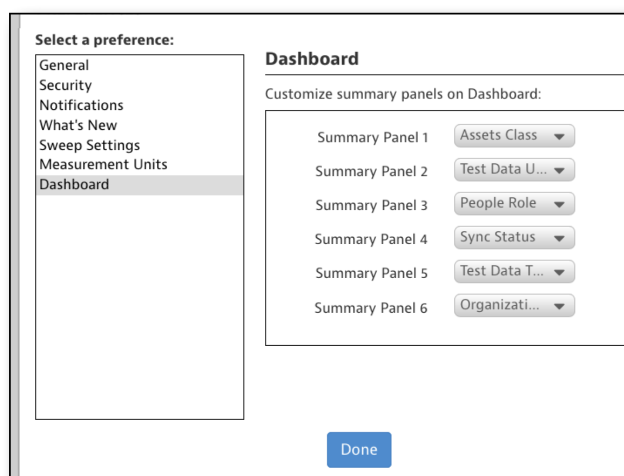

## Customizing your summary panels

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*.



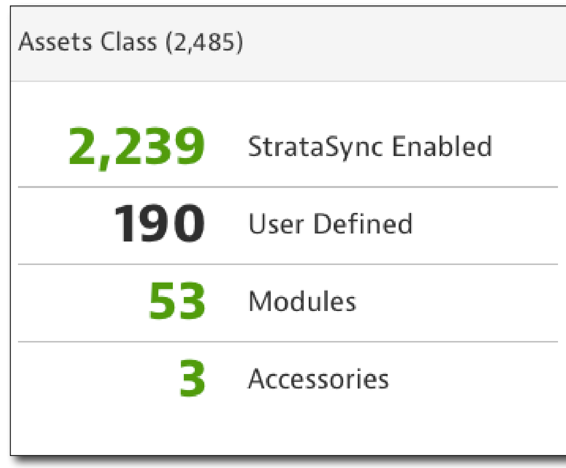
## Assets Class panel

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.

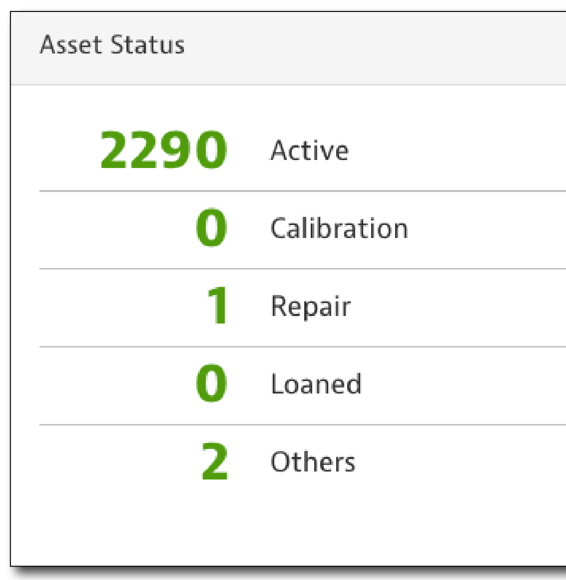



## Assets Status panel

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.

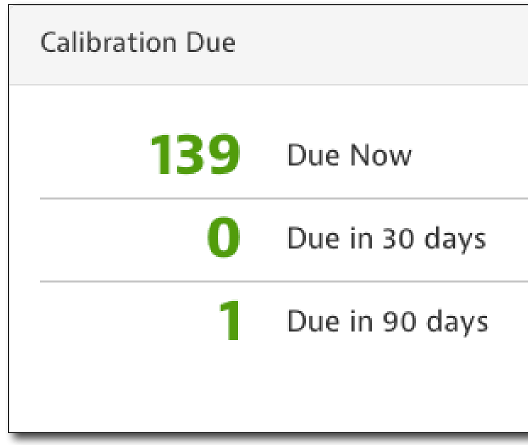


## Calibration Due panel

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.



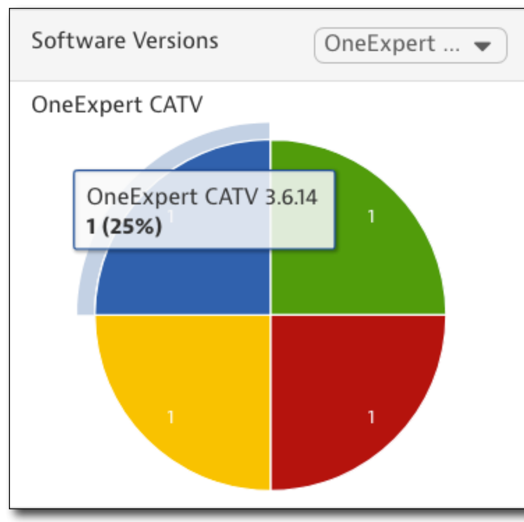

## Software Versions panel

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.

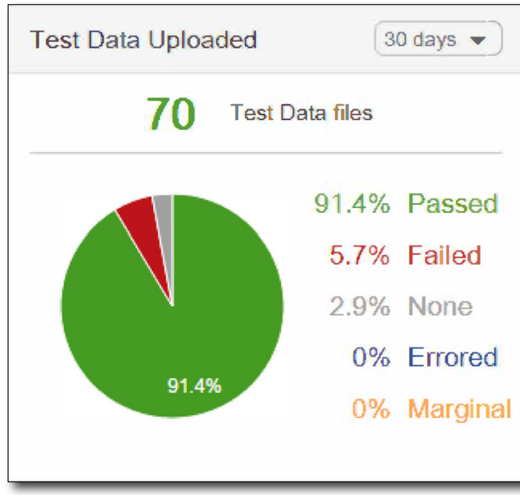
Select an area of the graph to show the details for each category in the Assets List.

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.

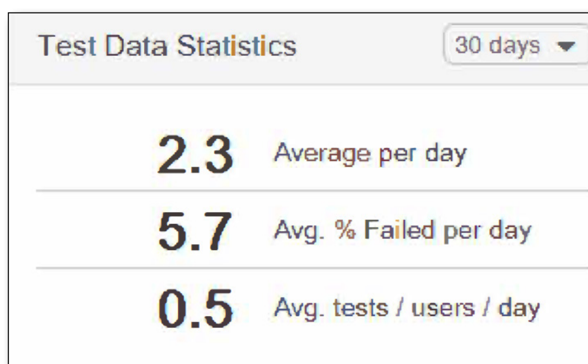
It is updated once per day (e.g. 2 a.m. EST for US Production, 2 a.m. CET for EU Production).

***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).

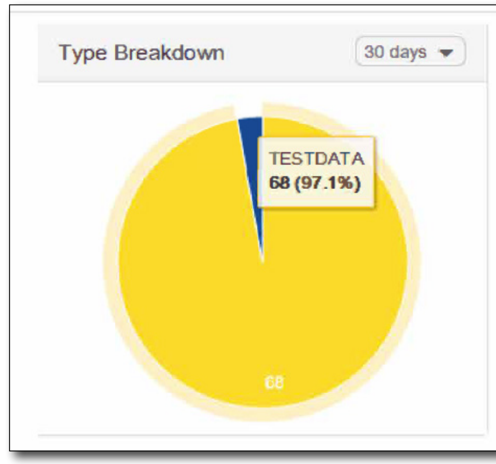
## Test Type Breakdown panel

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).

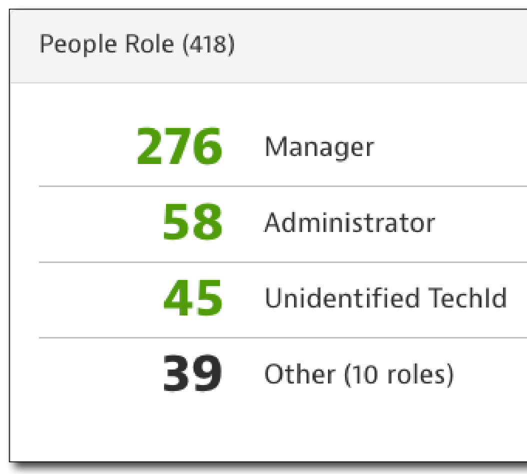



## People Role panel

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.

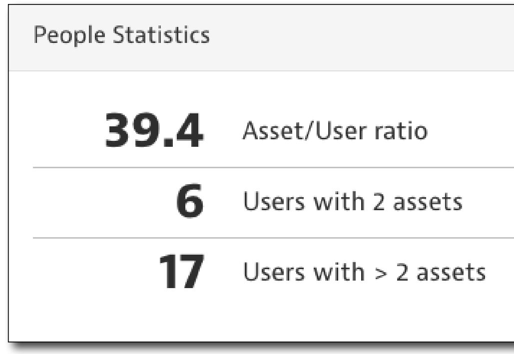
It is updated in real time. Refresh your browser to get the most recent view.



## People Statistics panel

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

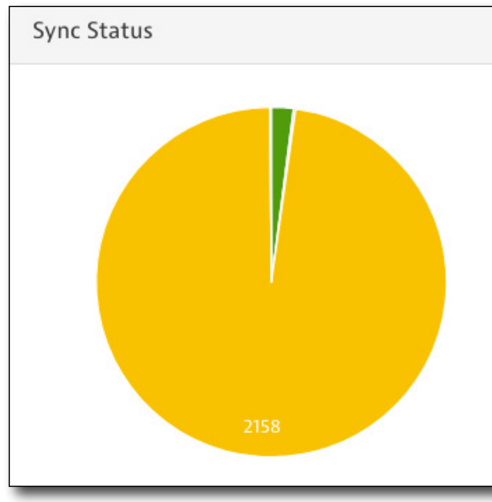
It is updated in real time. Refresh your browser to get the most recent view.




## 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.

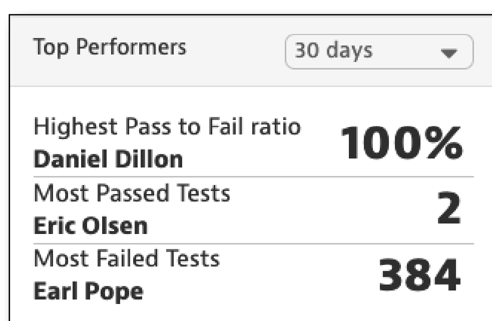
It is updated in real time. Refresh your browser to get the most recent view.

## 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**.

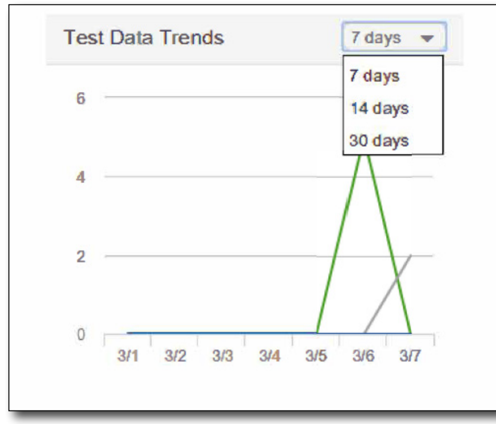
Use the dropdown to select the duration: **7**, **14**, or **30** days.

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.



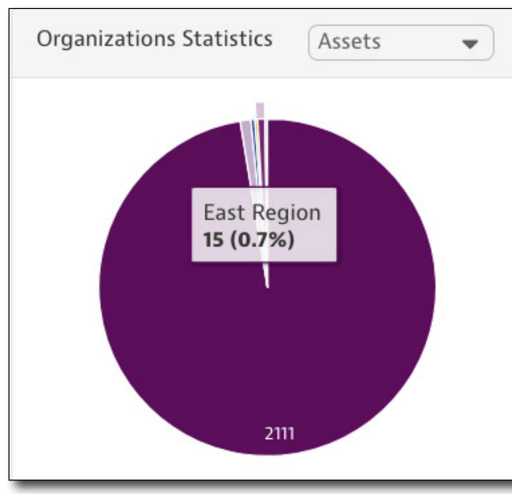

Use the dropdown to select the duration: **7**, **14**, or **30** days.

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

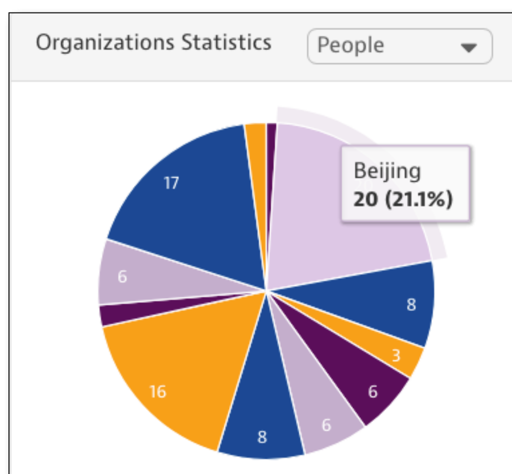
This panel provides the overall asset and people counts that are assigned to the selected organization.




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

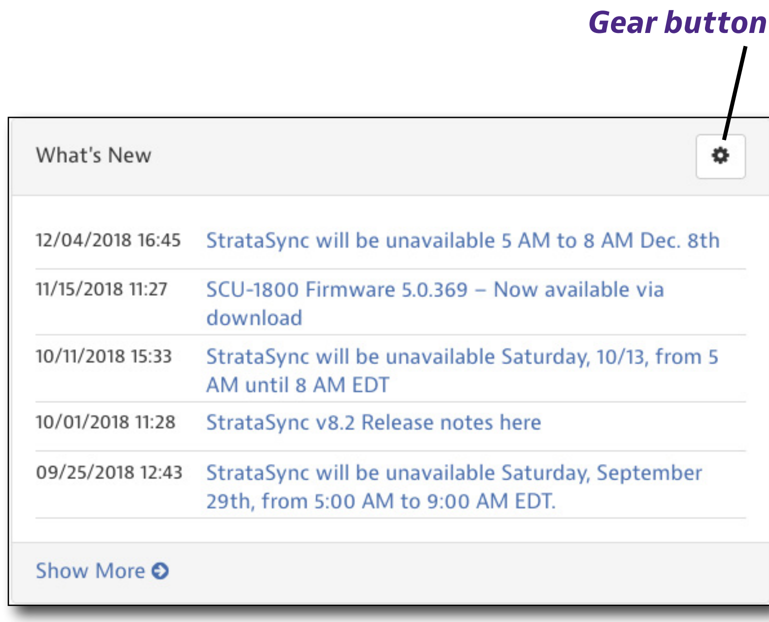
This panel provides application events and announcements per your preference settings.

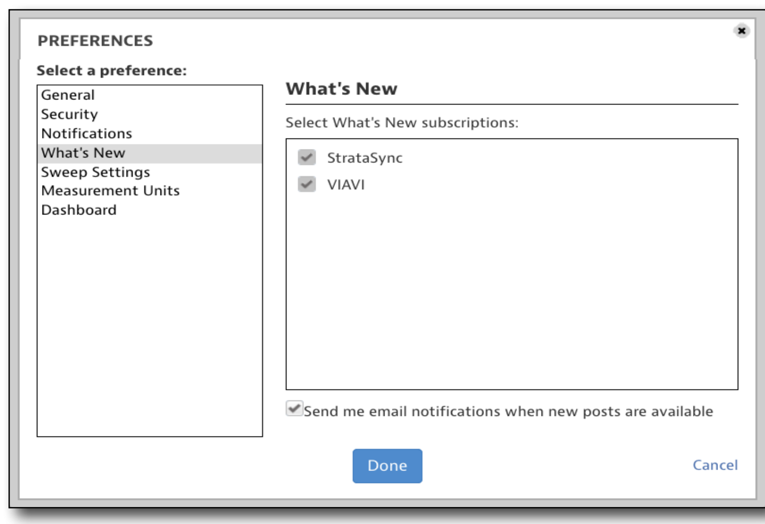
The available types of what's new categories are set up by your StrataSync Administrator.

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.



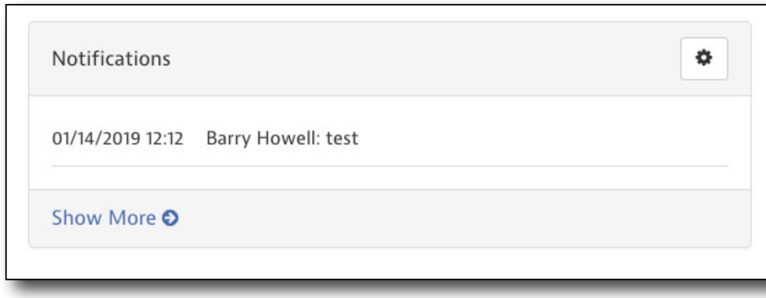
# Notifications panel

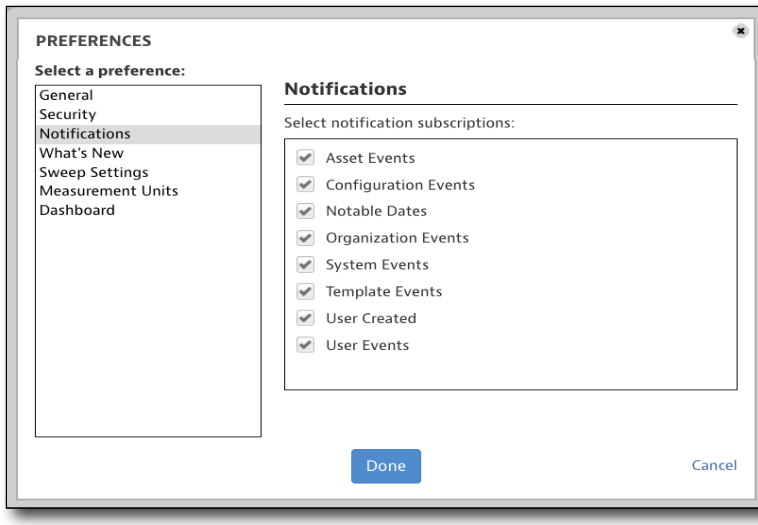
This panel provides application events and user messages per your preference settings.

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.*

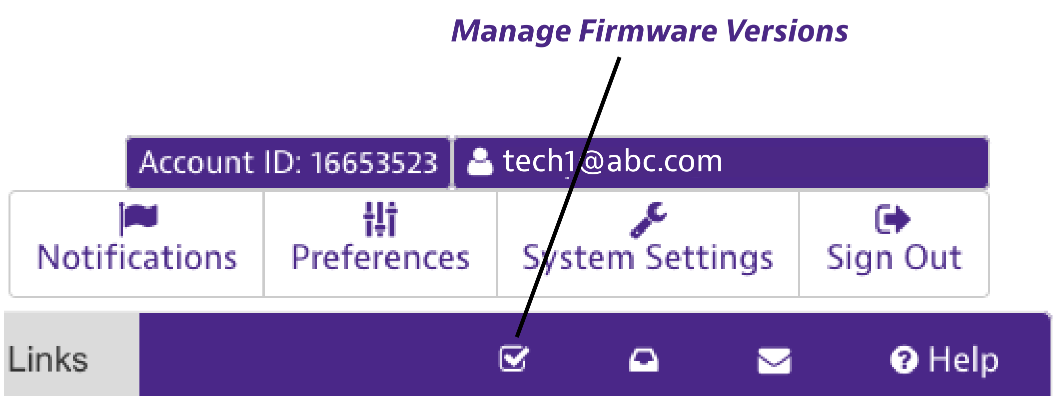
Firmware management allows you to limit the enterprise/account visibility of new firmware releases that are generally available from StrataSync. This design allows for testing and approval of the firmware before it is deployed to the entire field.

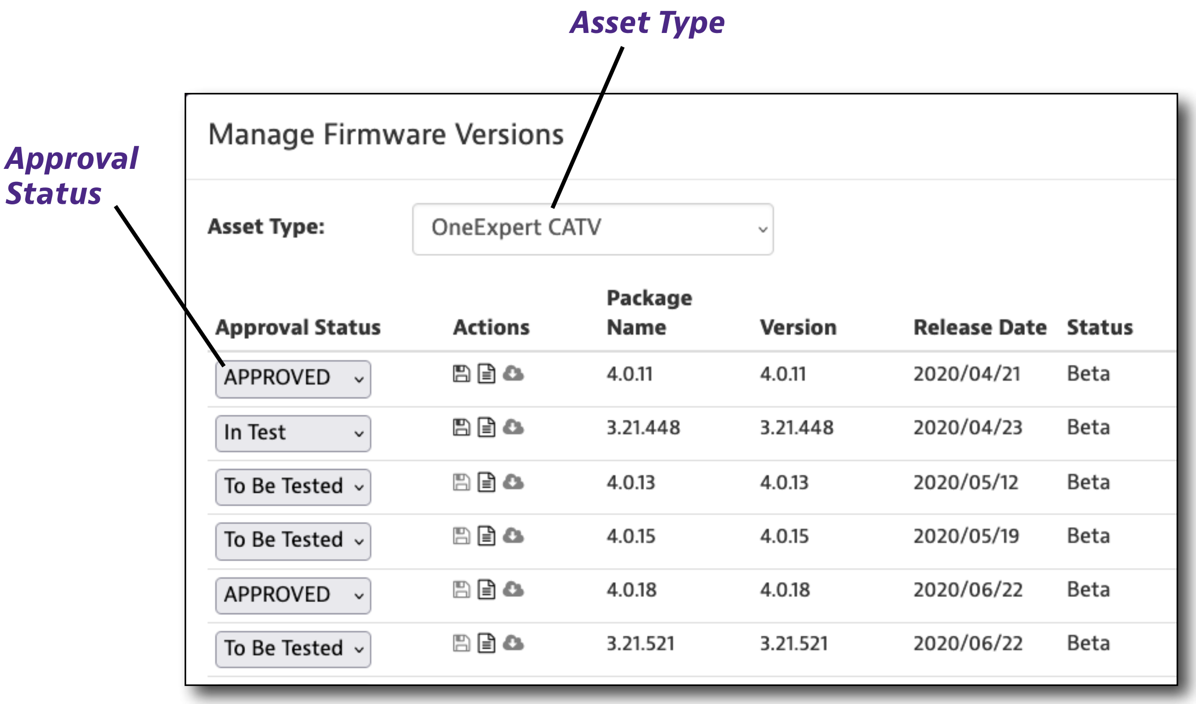
1. Select **Manage Firmware Versions** from the Main toolbar.
2. From the Manage Firmware Versions screen, select the asset type from the dropdown, and then use the **Approval Status** dropdowns to change the status for each version of firmware you want to update. Use the arrow buttons at the bottom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

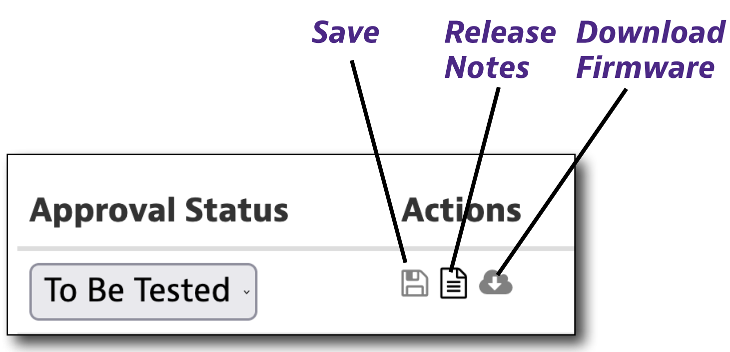




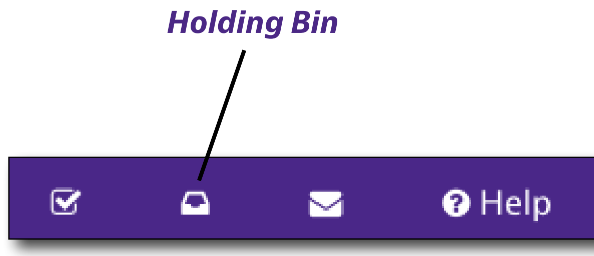

## Actions

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

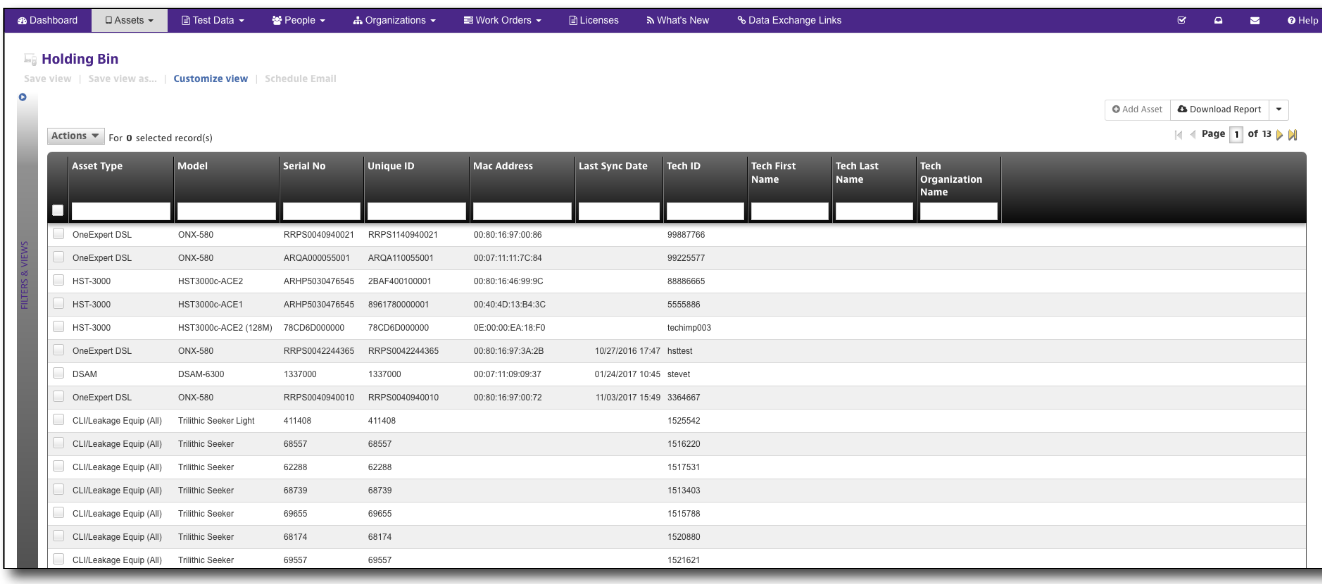



The **Holding Bin** provides a list of assets that have been synchronized to StrataSync for the first time at the factory.

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.



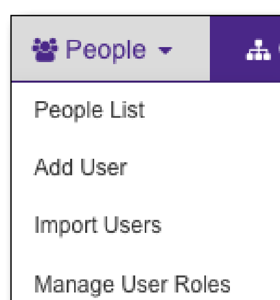

**StrataSync Holding Bin in the Assets List**

## Moving assets from the Holding Bin

Field test instrument assets will automatically reassign when connected via VIAVI 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.

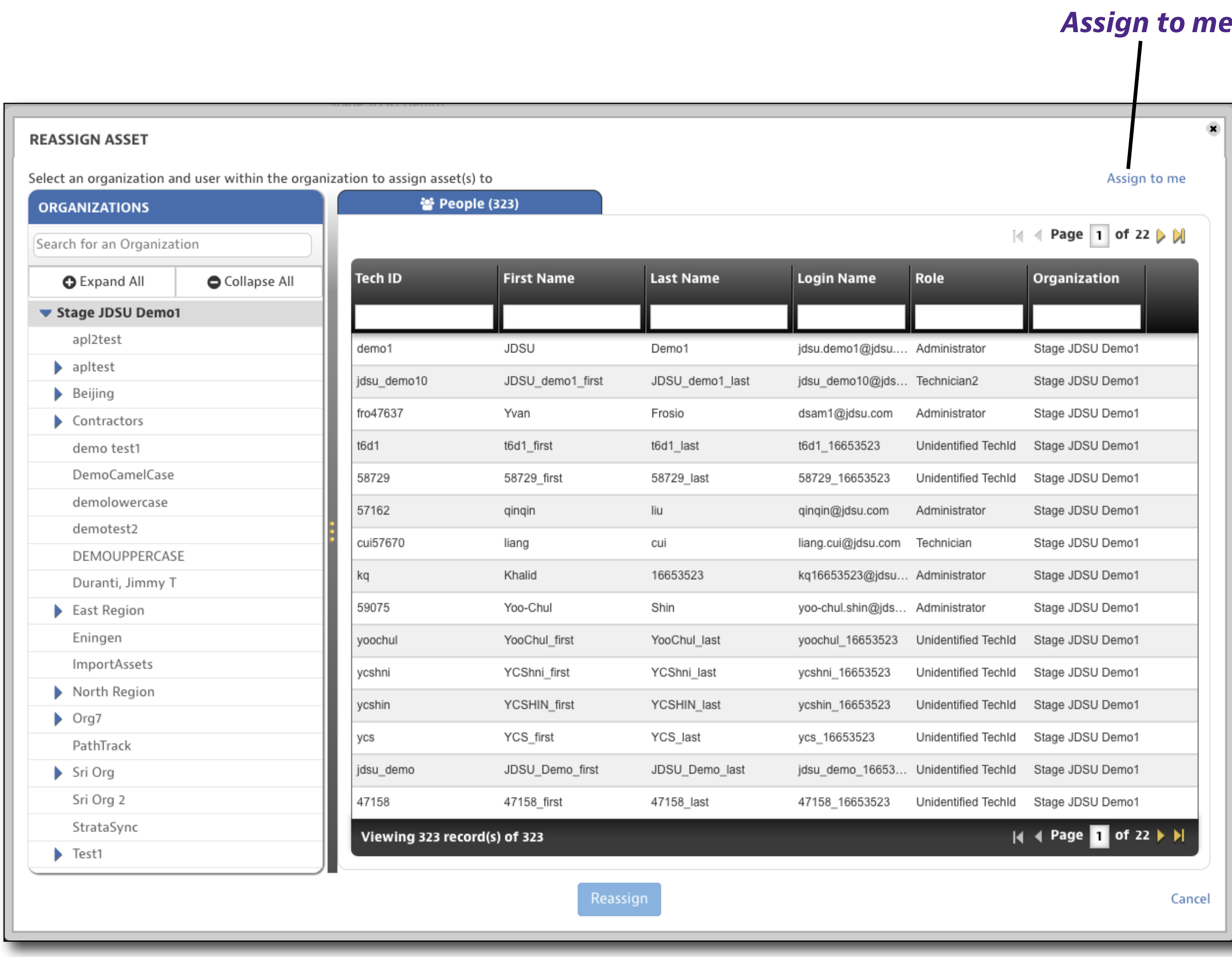
We'll discuss how to create a new user more in *"People" on page 179*, but for now, select the **People** tab and then ***Add User to*** get started.



## 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.

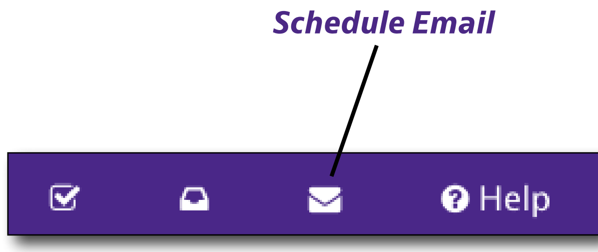



> ***NOTE:***
>
> ***You can also assign the asset to yourself by selecting Assign to me at the top right corner.***

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

4. When done, click **Confirm**.

# Scheduling emails

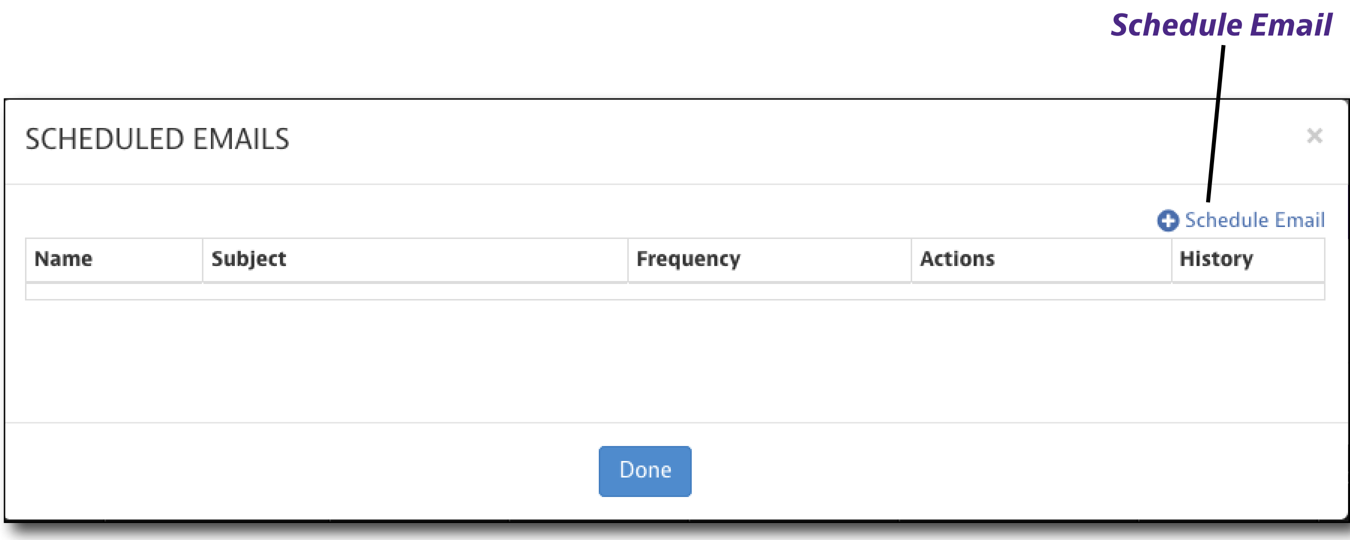



The **Schedule Email** feature allows you to receive periodic emails from StrataSync of various lists, including assets, users, licenses, options, and test data.

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.

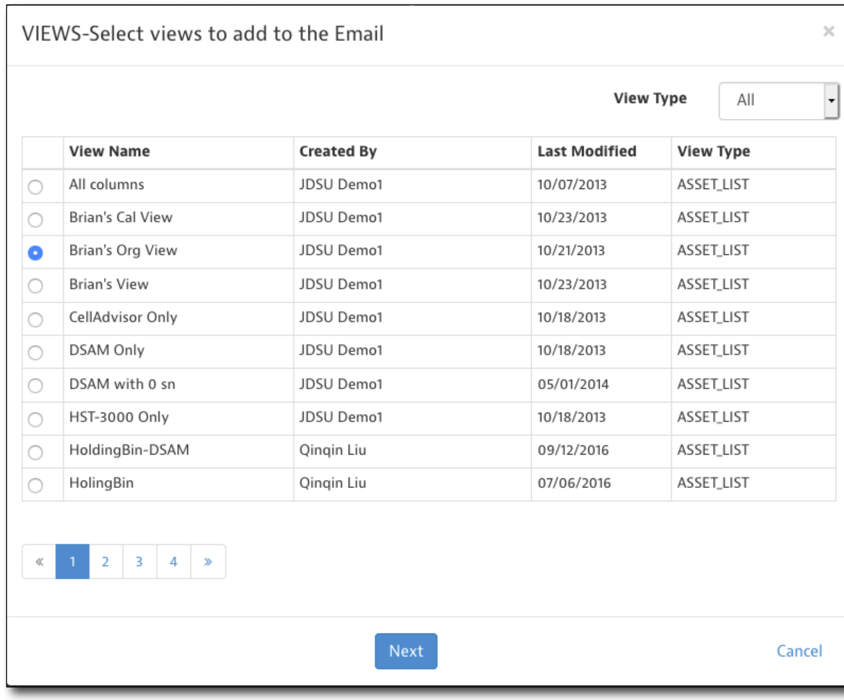
Select **Schedule Email** from the Main toolbar.

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

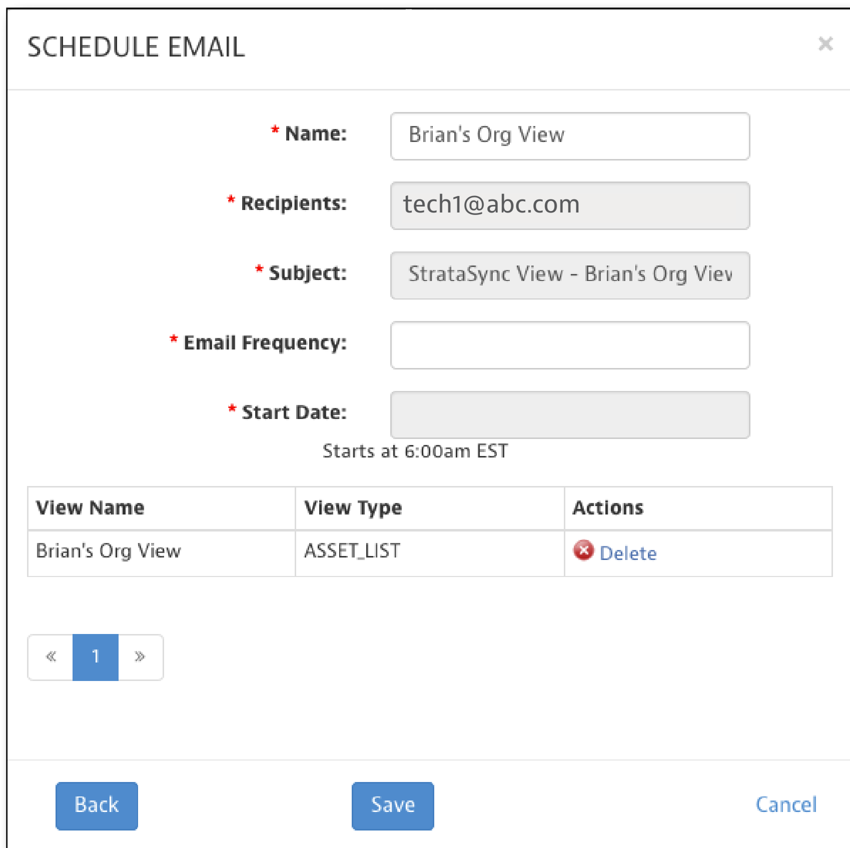


Use the **View Type** dropdown in the top right to choose the type, including: **All**, **Assets**, **Licensing**, **Options**, **People**, and **Test Data**.

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

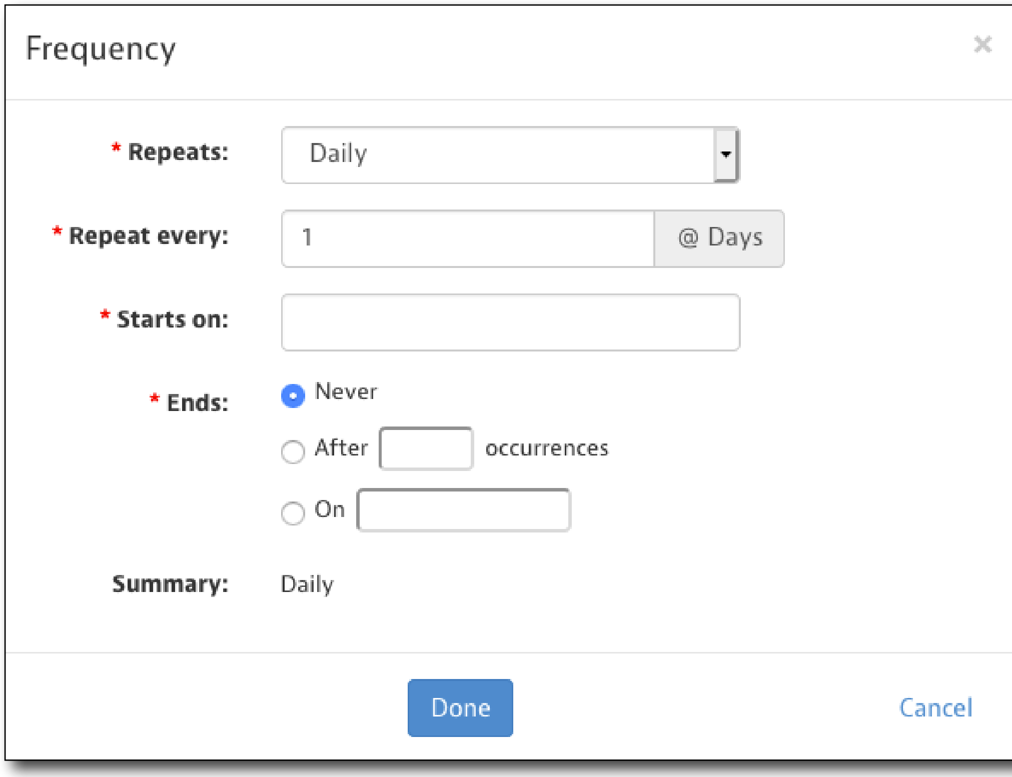



Click the **Email Frequency** box to bring up the Frequency screen.



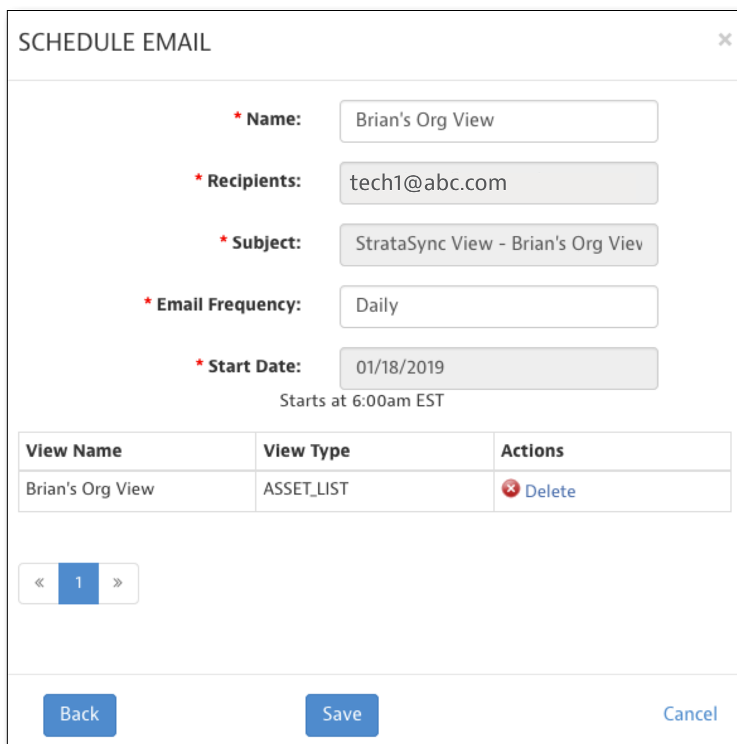
Use the **Repeats** dropdown to choose **Daily**, **Weekly**, **Monthly**, or **Yearly**.

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



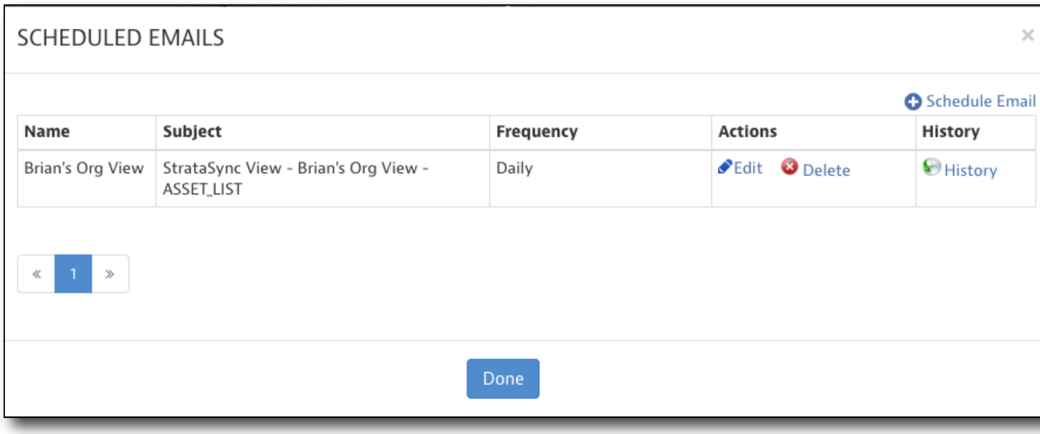

When you go back to the Schedule Email screen, the email frequency and start date will be updated.

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



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

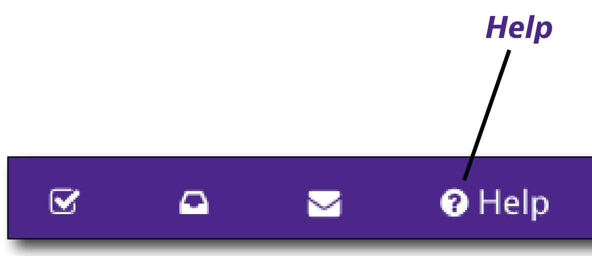
You can edit, delete, or view the history here later, as well.




# 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.



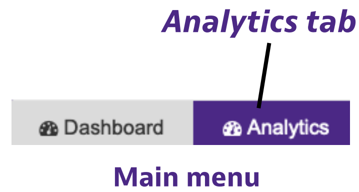

4

# Analytics

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

# Analytics

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



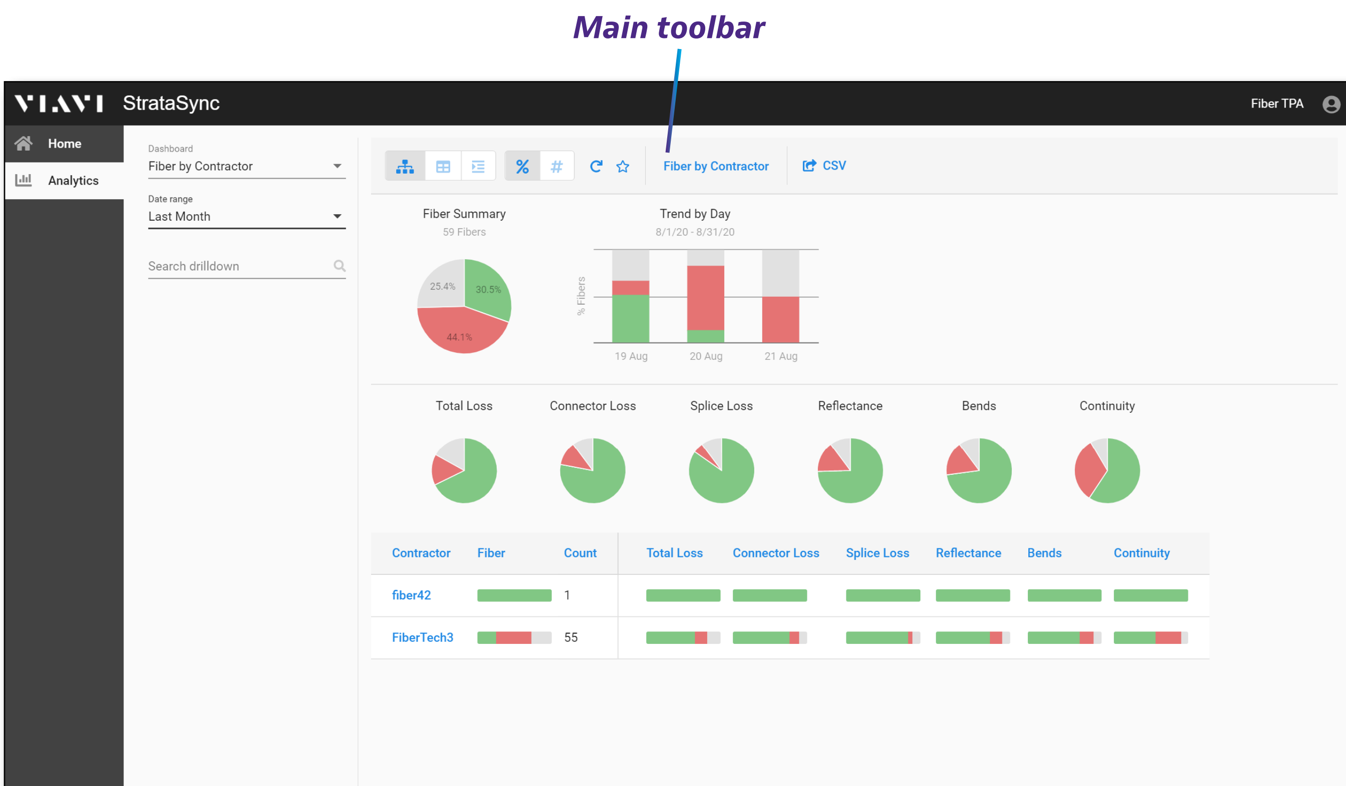

Click the **Analytics** tab in the Main menu to bring up the Analytics Dashboard, then use the filter panel on the left to choose the desired dashboard.

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

## Fiber Dashboard

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

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




Fiber 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.

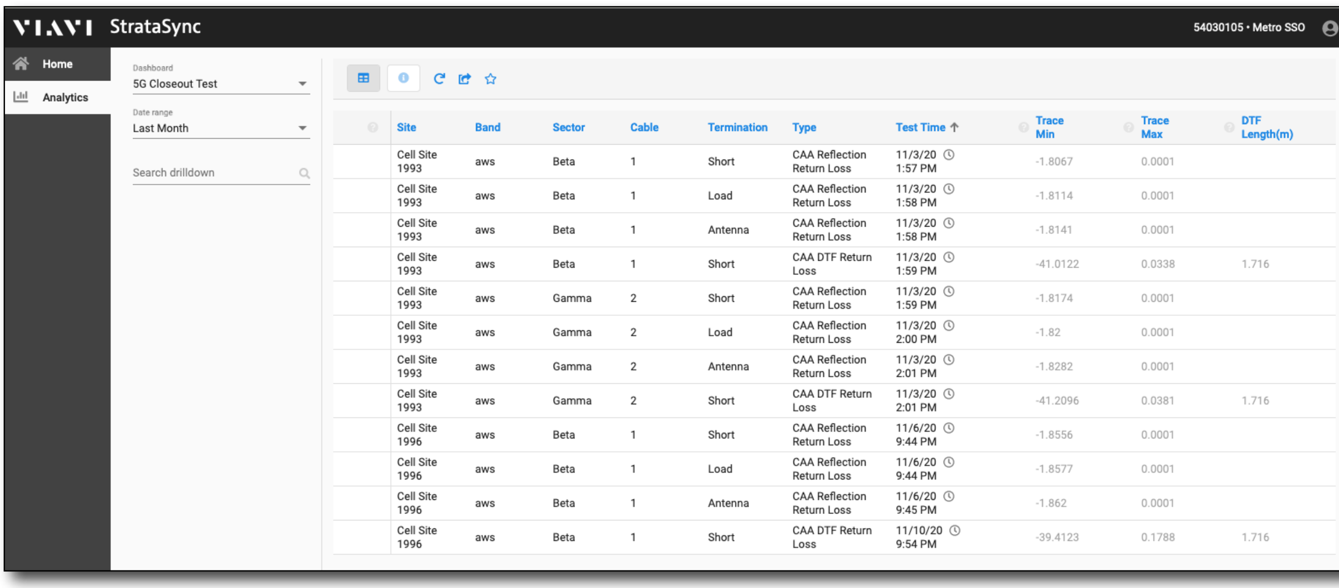
***NOTE:***

***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.




**5G Dashboard**

## Optimeter Dashboard

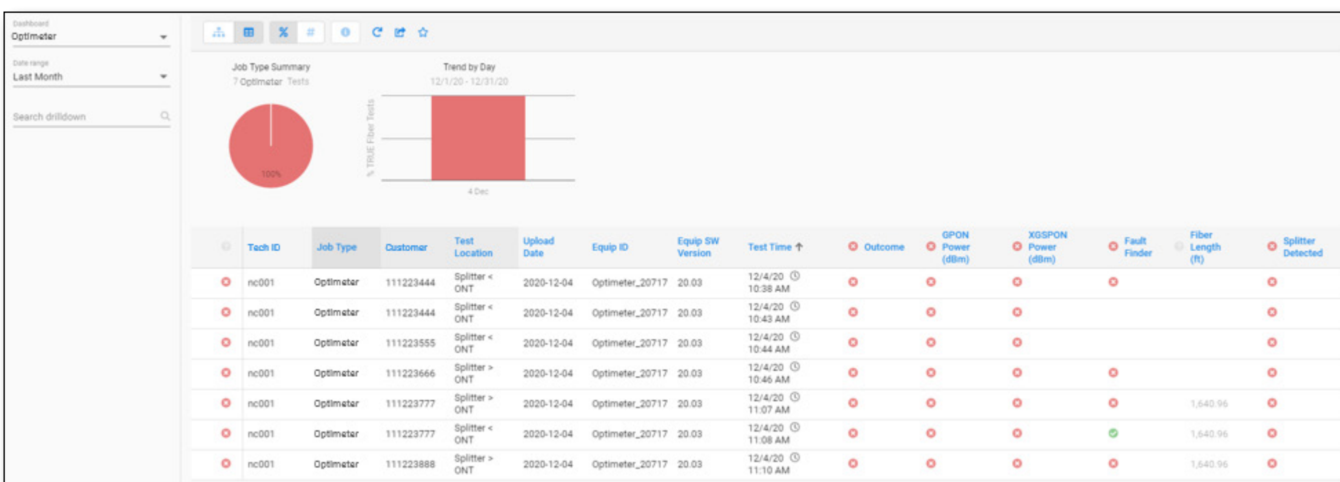
By default, the **Optimeter Dashboard** supports viewing Optimeter test results aggregated according to the organizations configured in the StrataSync account, and the 'techId' indicated in the received test results. The dashboard displays and aggregates pass/fail indicators based on the criteria used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

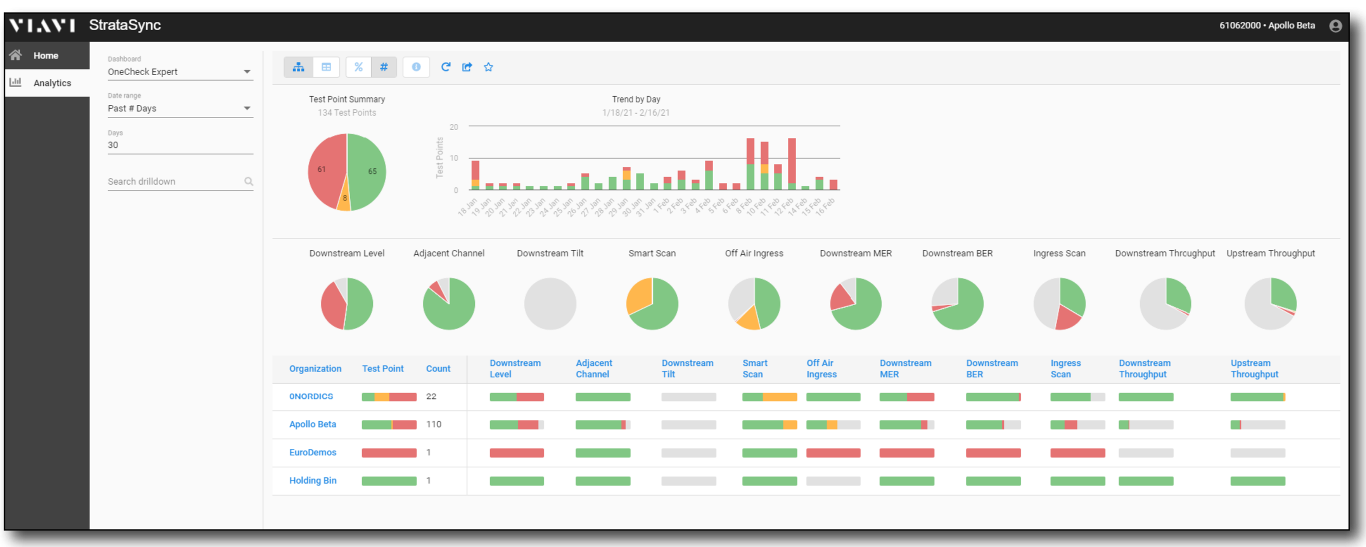
The CATV Dashboards allow you to view closeout reports and testing results in the field using the ONX-6xx (ONX CATV) instruments.

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.

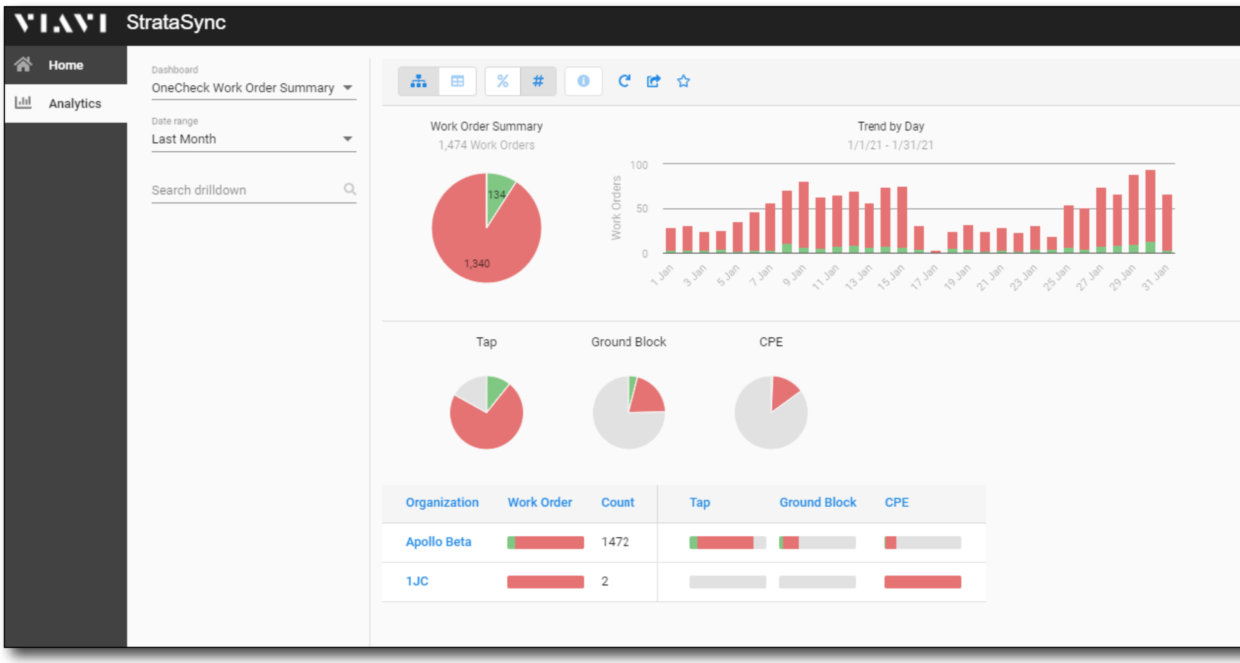



**OneCheck Expert Dashboard**

## *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.

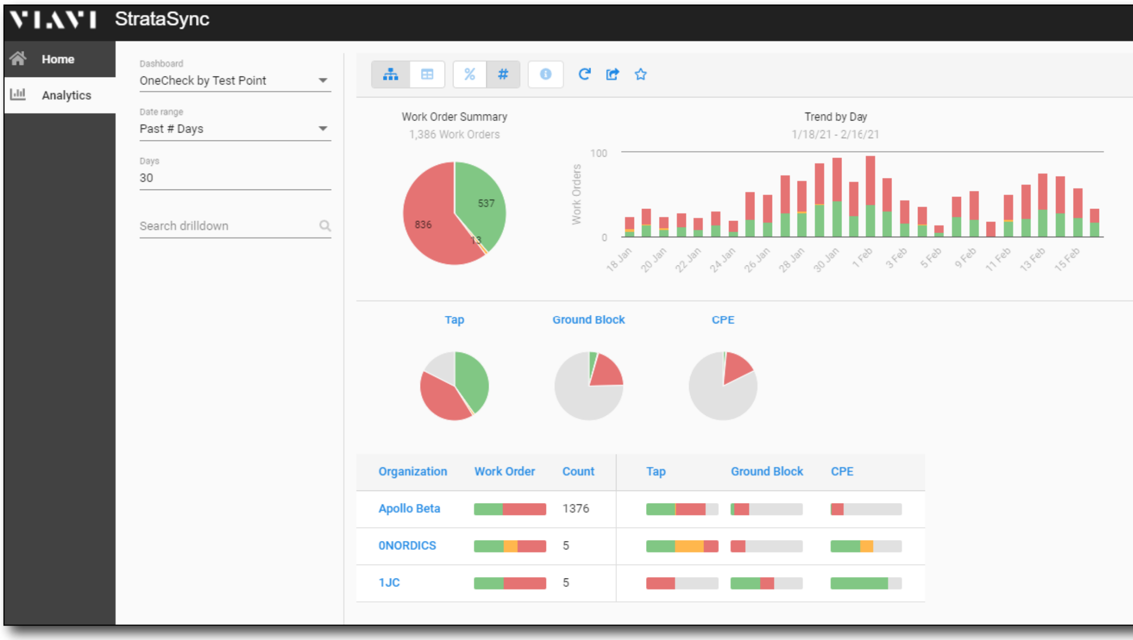
The tabular view starts by further breaking down the results by organization, then clicking on an organization will give a breakdown by technician, and finally clicking on a specific technician will break out the test results per-workorder with per-test location pass/fail status and links back to the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




**OneCheck Work Order Summary Dashboard**

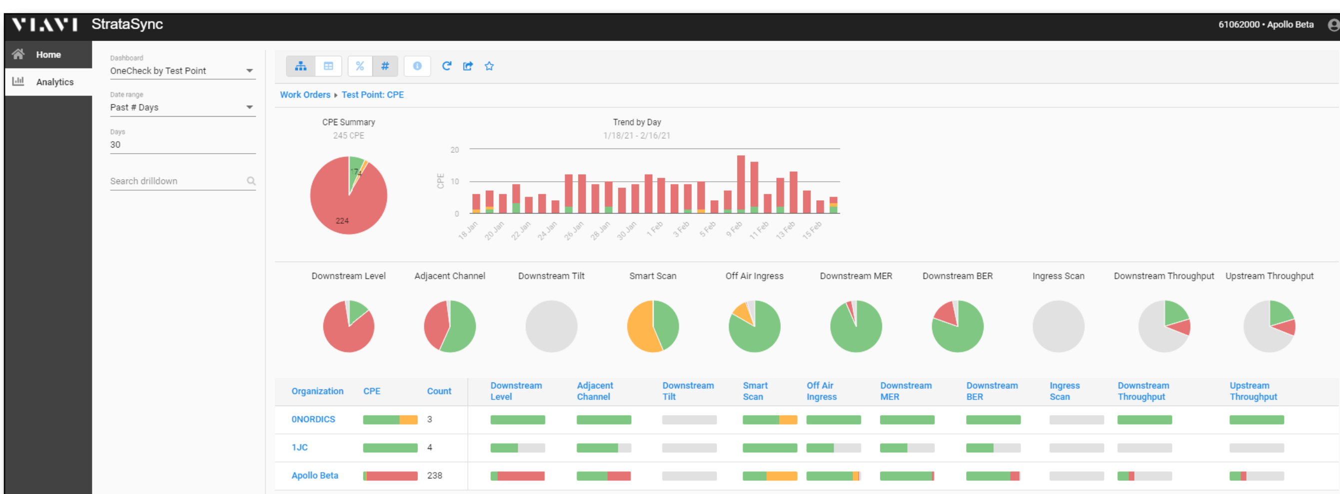
## *OneCheck by Test Point*

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**

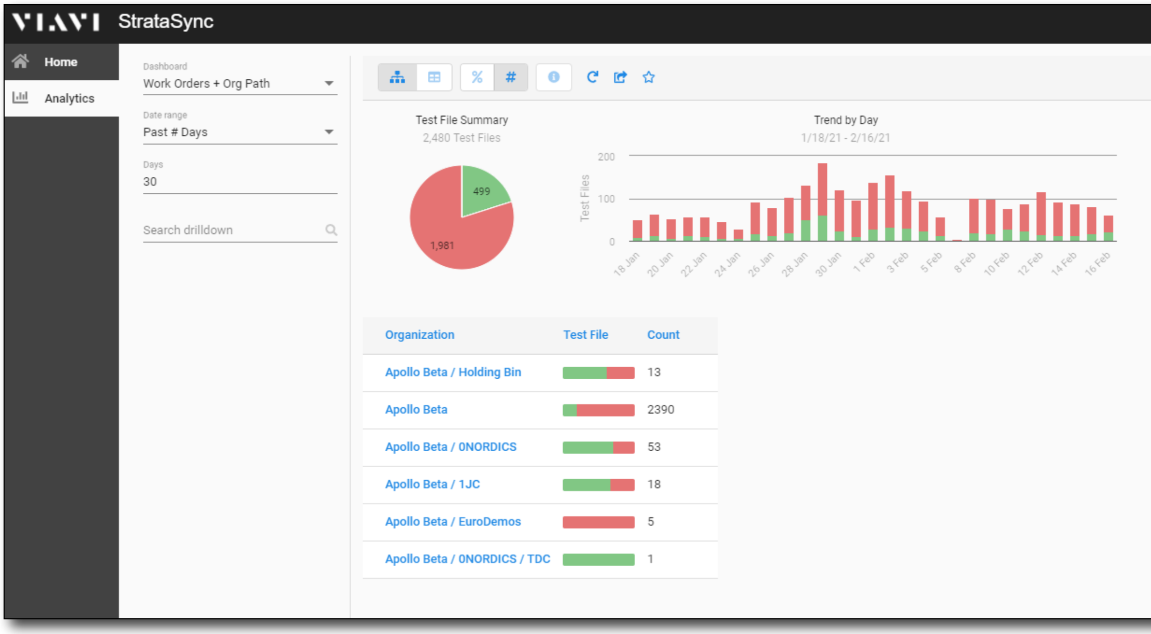
In the example below, the user drilled-down on the ‘CPE’ location, which then modifies the view to show detailed metrics for results taken at the CPE. Users can then drill-down by organization and technician as with the previous dashboards.




**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.

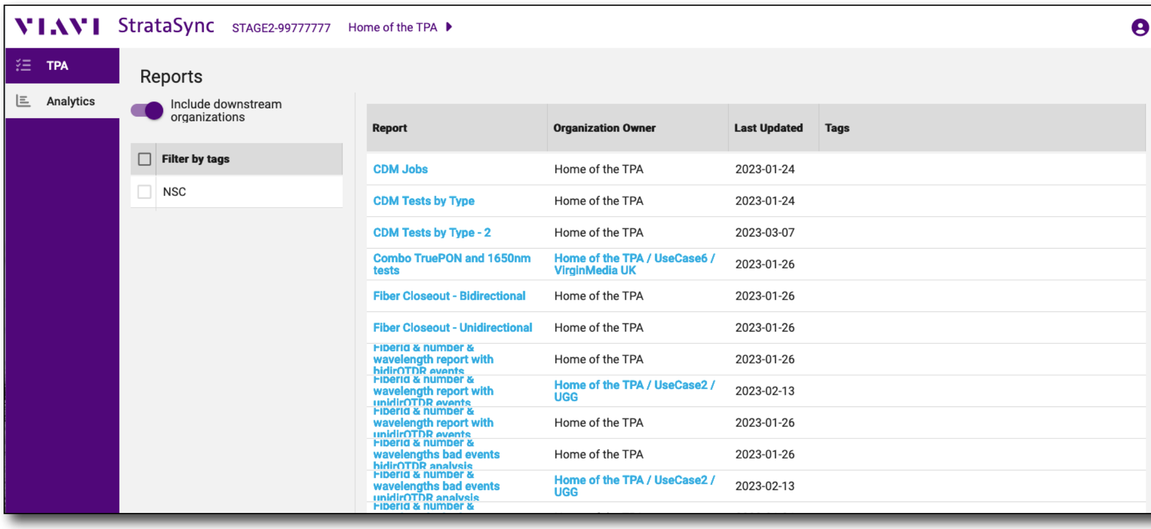
For test results to be included in this dashboard, they must have the Work Order ID field populated.

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.

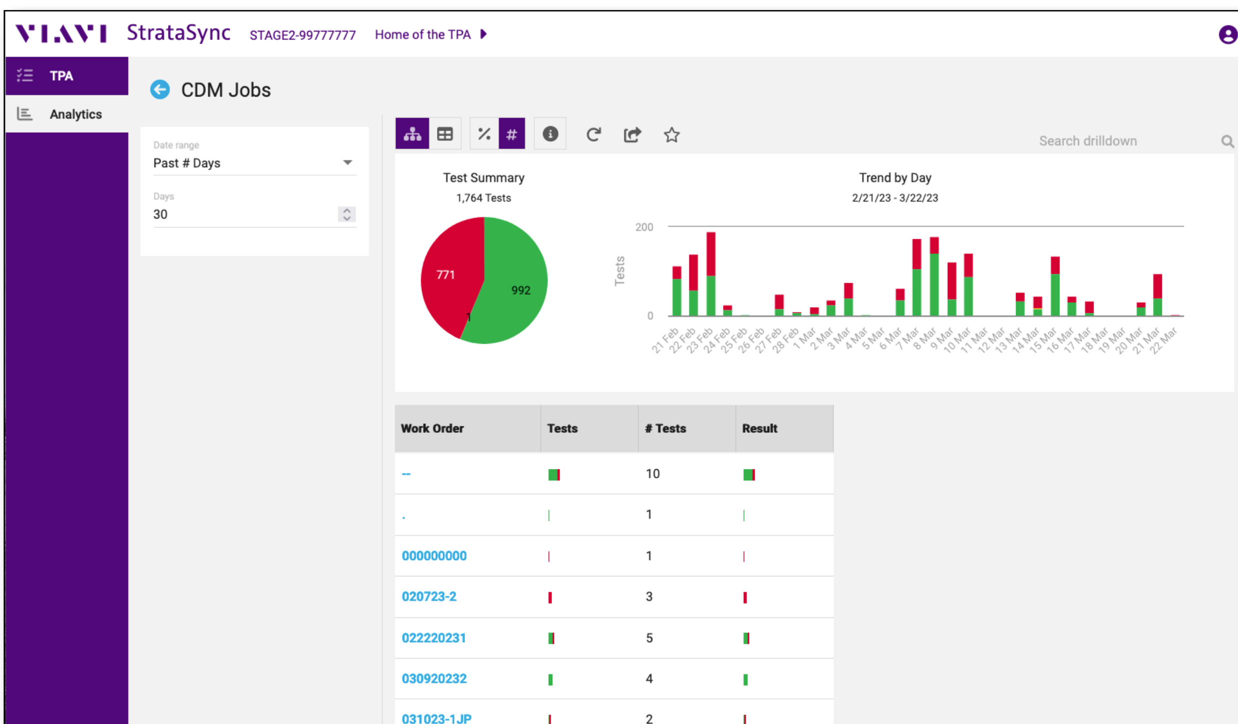
# Analytics Dashboard

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 individial dashboard.




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.

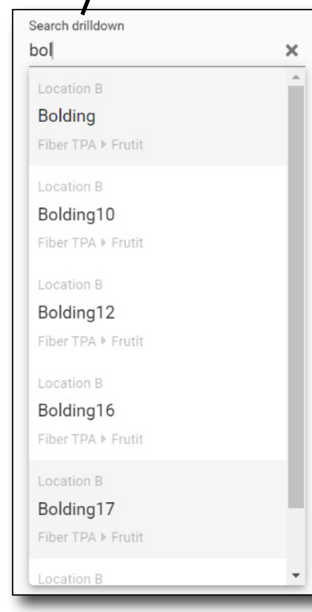
Along with test results, this dashboard can process work order events (creates, updates, deletes). This enables true work order (job) completion progress analysis as the KPI/Analytics framework has access to work orders as they are created and deployed, not just when work order-associated test results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

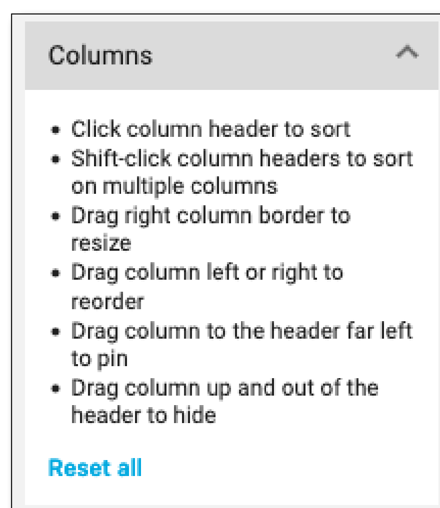
***Search drilldown***




# Sorting

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

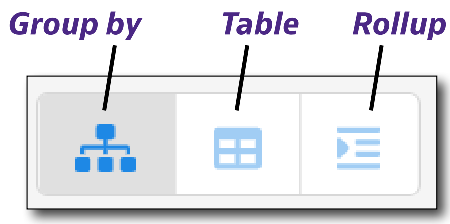
This details multiple column sorting, column resizing, column reordering, column pinning and column hiding features. Saving the view as a favorite (star icon in the header) will preserve all column settings applied.



# Views

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

## View options



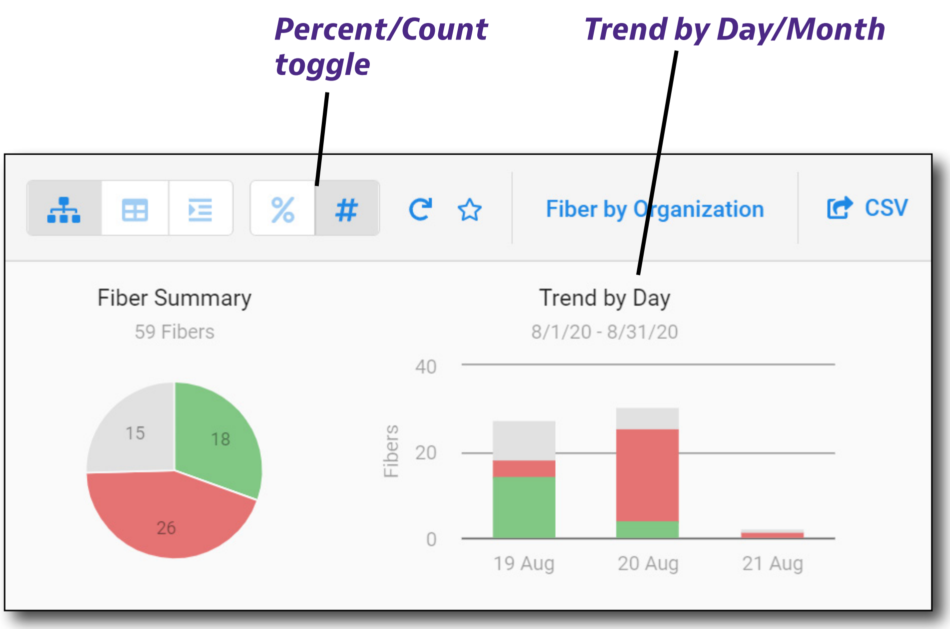

The configured view options are found at the top of the screen:

- **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.

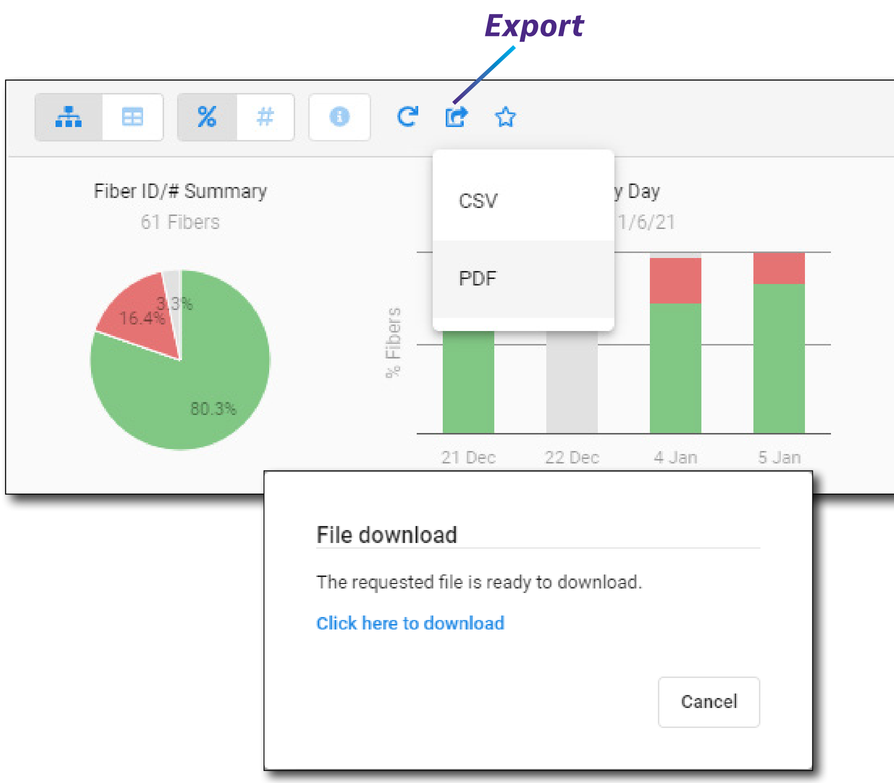


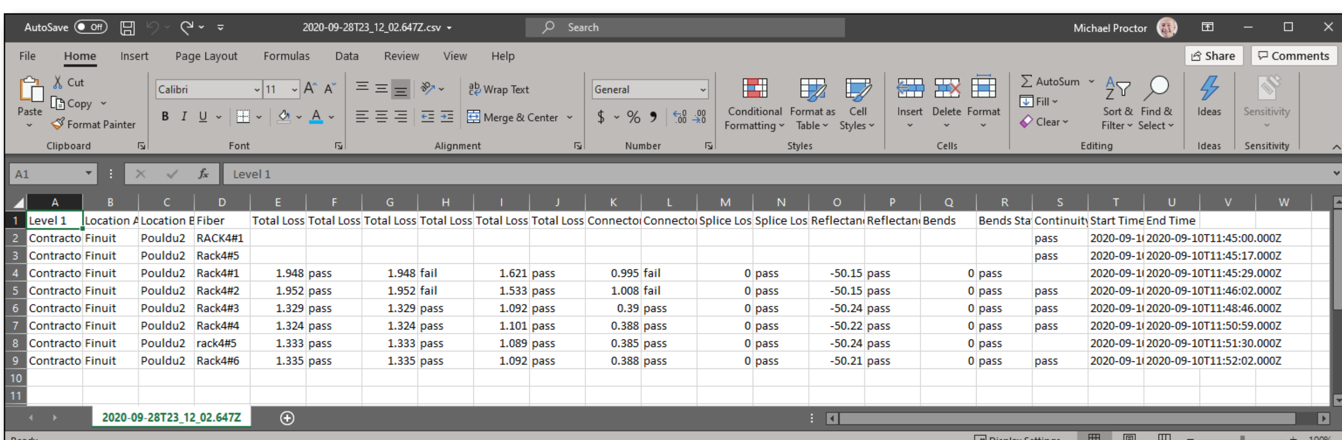
# Exporting files

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 B | 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 | Finuit | Pouldu2 | RACK4#1 | | | | | | | | | | | | | | | pass | 2020-09-1 | 2020-09-10T11:45:00.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#5 | | | | | | | | | | | | | | | pass | 2020-09-1 | 2020-09-10T11:45:17.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#1 | 1.948 | pass | 1.948 | fail | 1.621 | pass | 0.995 | fail | 0 | pass | -50.15 | pass | 0 | pass | | 2020-09-1 | 2020-09-10T11:45:29.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#2 | 1.952 | pass | 1.952 | fail | 1.533 | pass | 1.008 | fail | 0 | pass | -50.15 | pass | 0 | pass | pass | 2020-09-1 | 2020-09-10T11:46:02.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#3 | 1.329 | pass | 1.329 | pass | 1.092 | pass | 0.39 | pass | 0 | pass | -50.24 | pass | 0 | pass | pass | 2020-09-1 | 2020-09-10T11:48:46.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#4 | 1.324 | pass | 1.324 | pass | 1.101 | pass | 0.388 | pass | 0 | pass | -50.22 | pass | 0 | pass | pass | 2020-09-1 | 2020-09-10T11:50:59.000Z |
| Contracto | Finuit | Pouldu2 | rack4#5 | 1.333 | pass | 1.333 | pass | 1.089 | pass | 0.385 | pass | 0 | pass | -50.24 | pass | 0 | pass | | 2020-09-1 | 2020-09-10T11:51:30.000Z |
| Contracto | Finuit | Pouldu2 | Rack4#6 | 1.335 | pass | 1.335 | pass | 1.092 | pass | 0.388 | pass | 0 | pass | -50.21 | pass | 0 | pass | pass | 2020-09-1 | 2020-09-10T11:52:02.000Z |

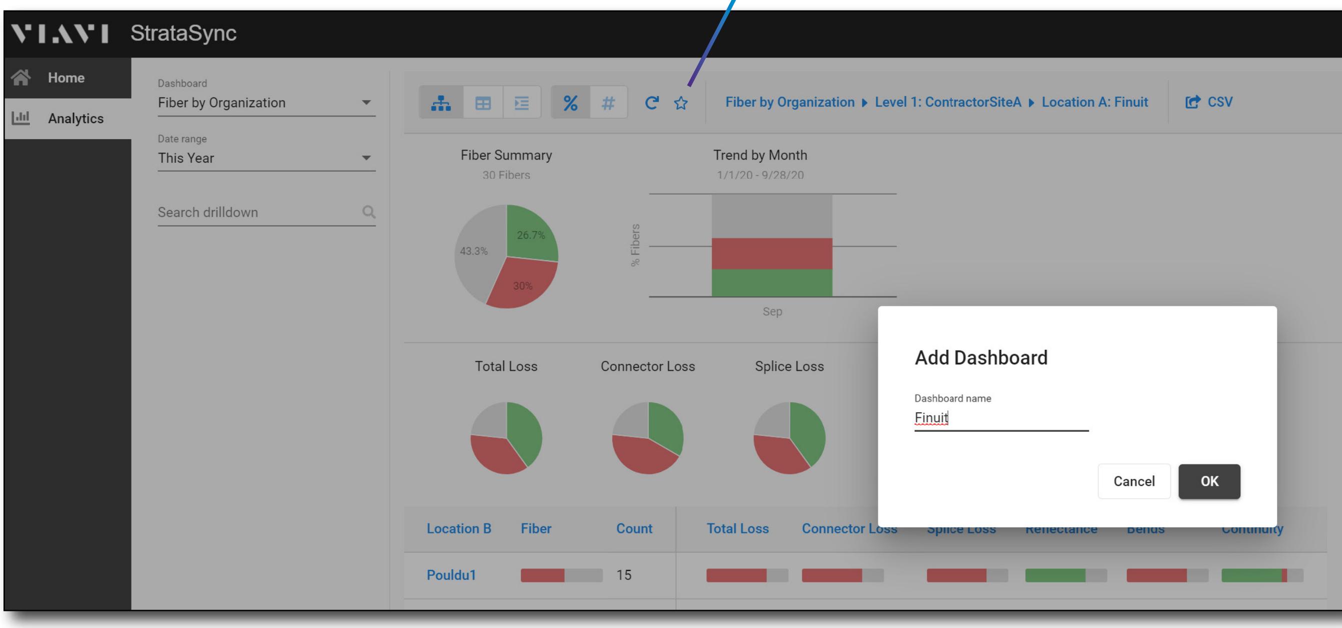
**CSV file detail**

# 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**.

***Star***

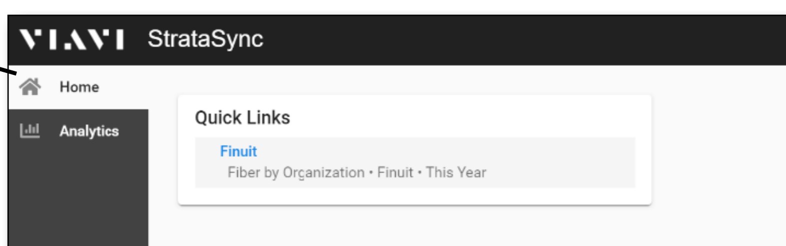



## Viewing dashboards

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**.

***Home tab***




**Quick Links Dashboards**

5

# Test Process Automation

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

# Test Process Automation

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

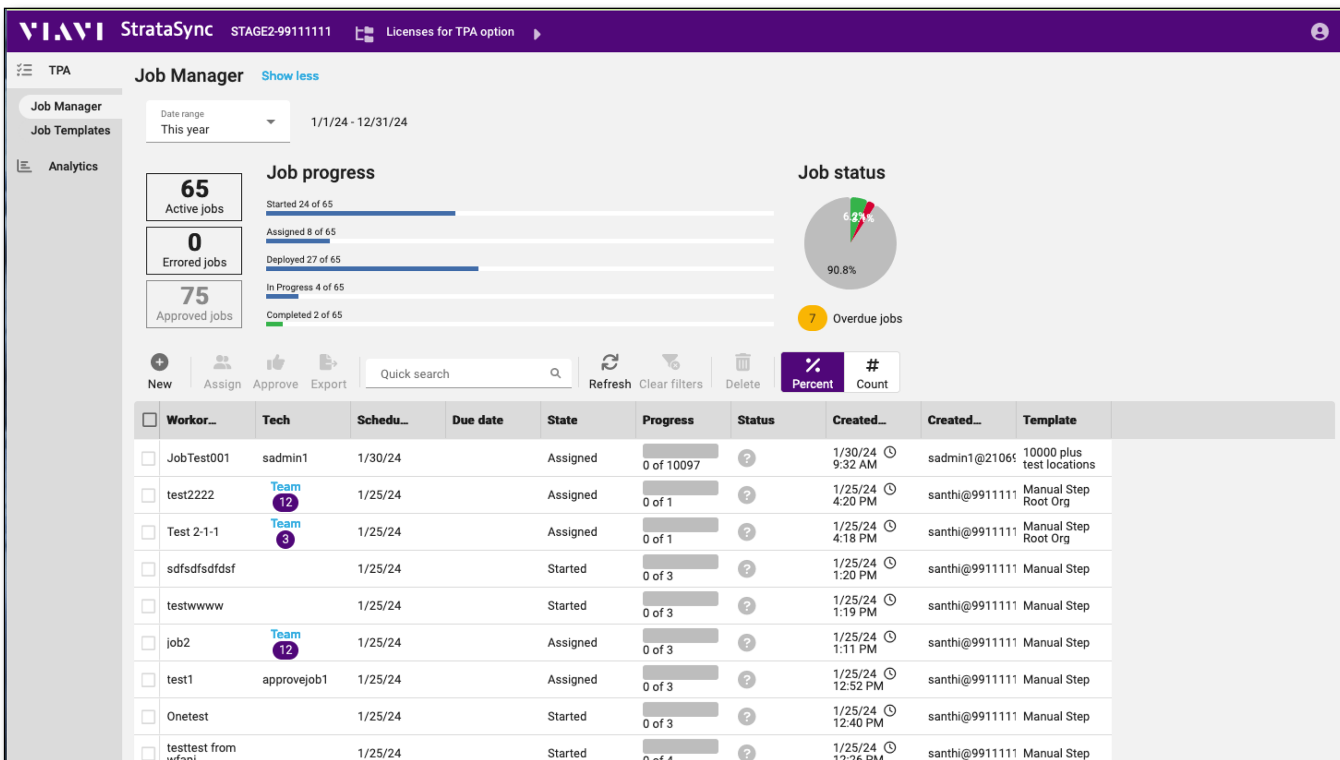
Powered by StrataSync, TPA connects teams and their test instruments together to ensure alignment, efficiency, and accuracy at every stage of a job.

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.


**Main menu**

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.

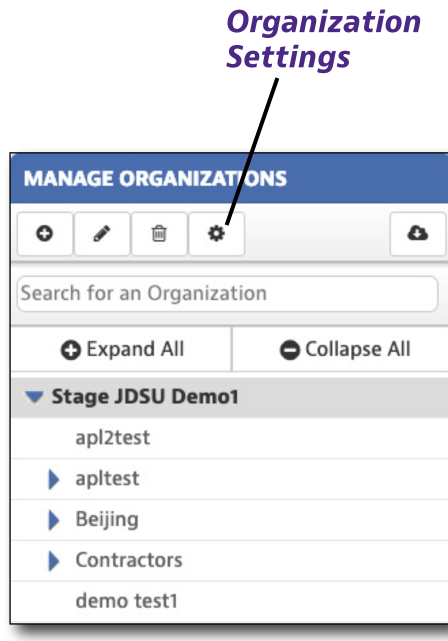



**Job Manager Dashboard**

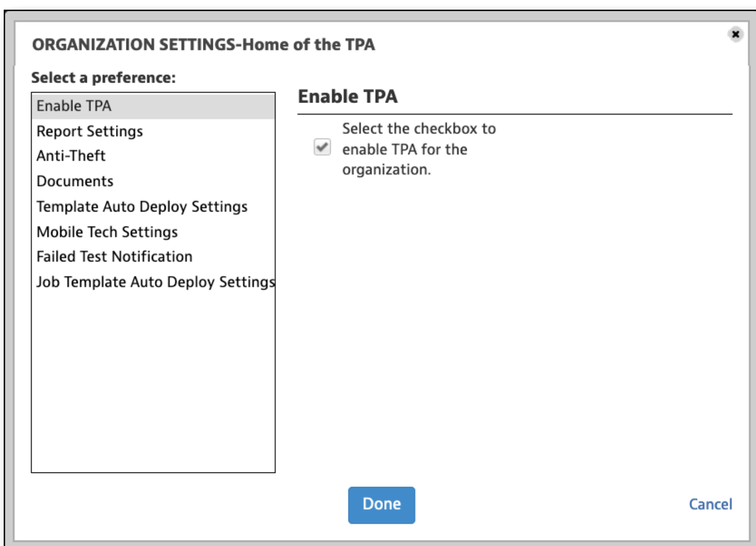
## Setting up TPA

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**

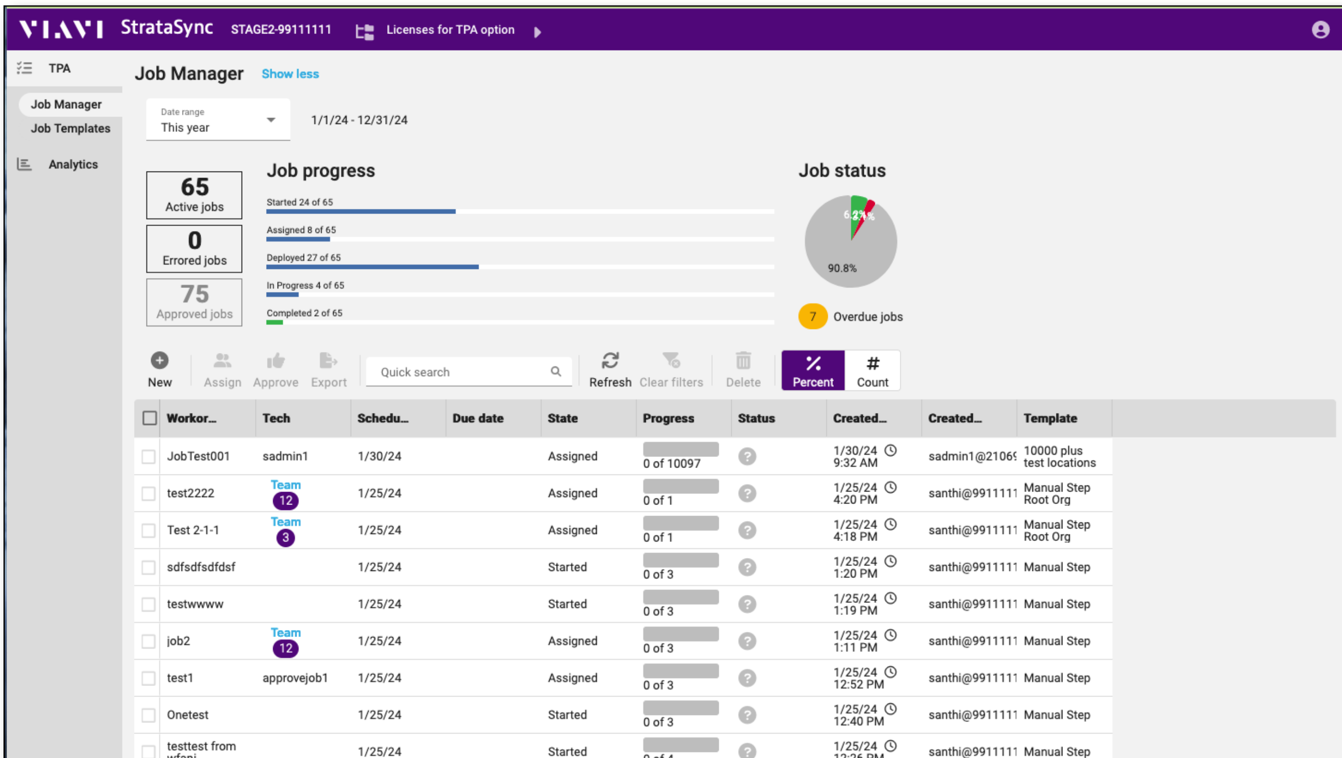
# Job Manager Dashboard

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.***

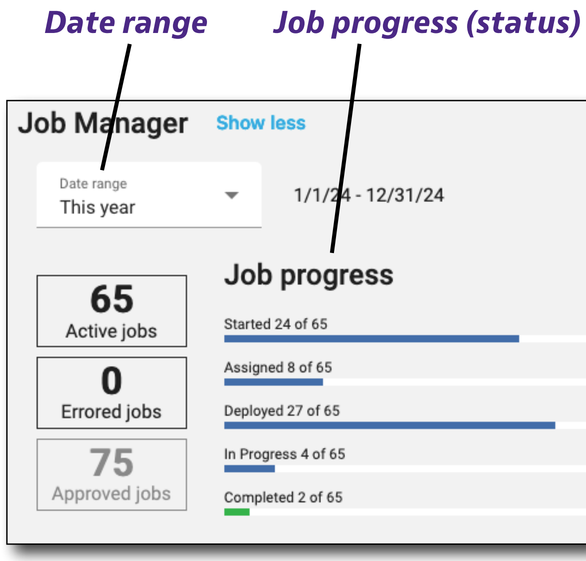
## Job progress chart

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**.



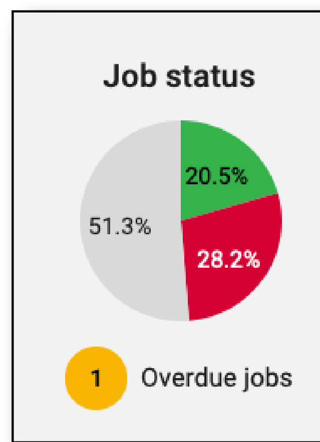

## Job status chart

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.

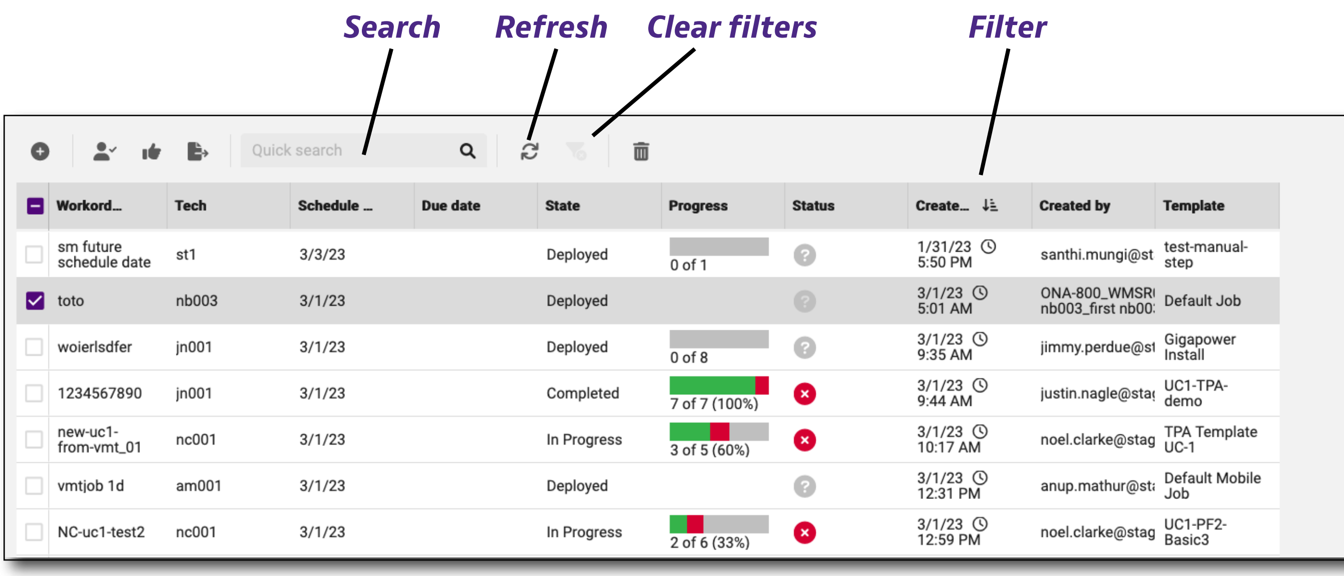
# Jobs List

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

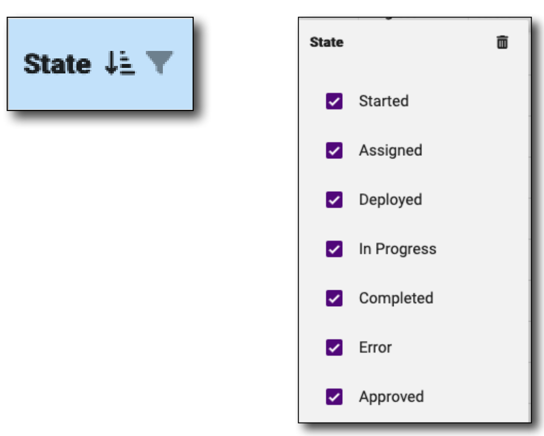
Here you can also create new jobs, assign, approve, export to JSON, and delete jobs. See the following sections for detail on these features.

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**.




**Jobs List**




**Column sort filters and dropdowns**

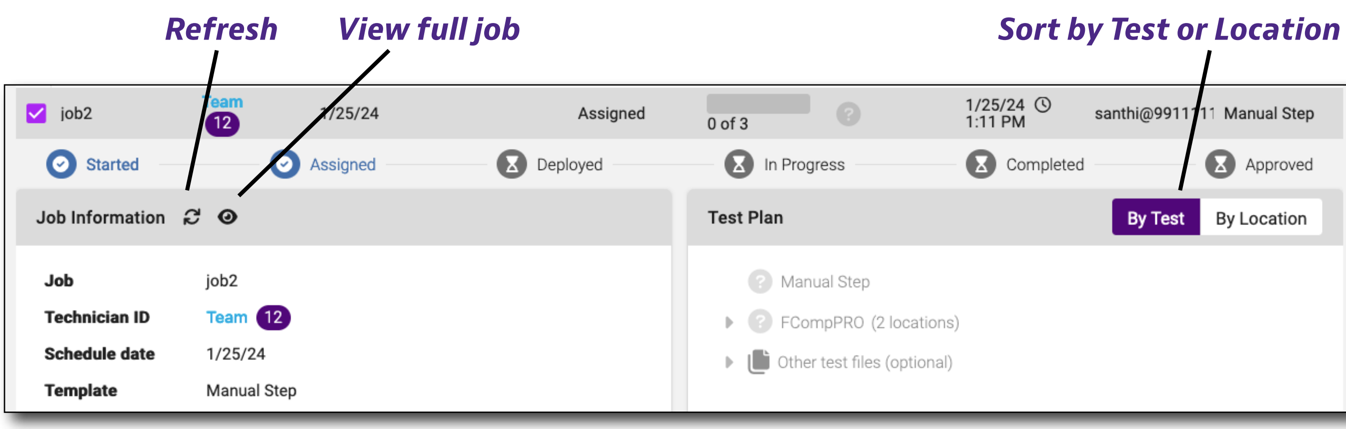
Click on a job line to expand and see additional job details, including job state, technician assigned, schedule, template, test locations, and test plans.

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

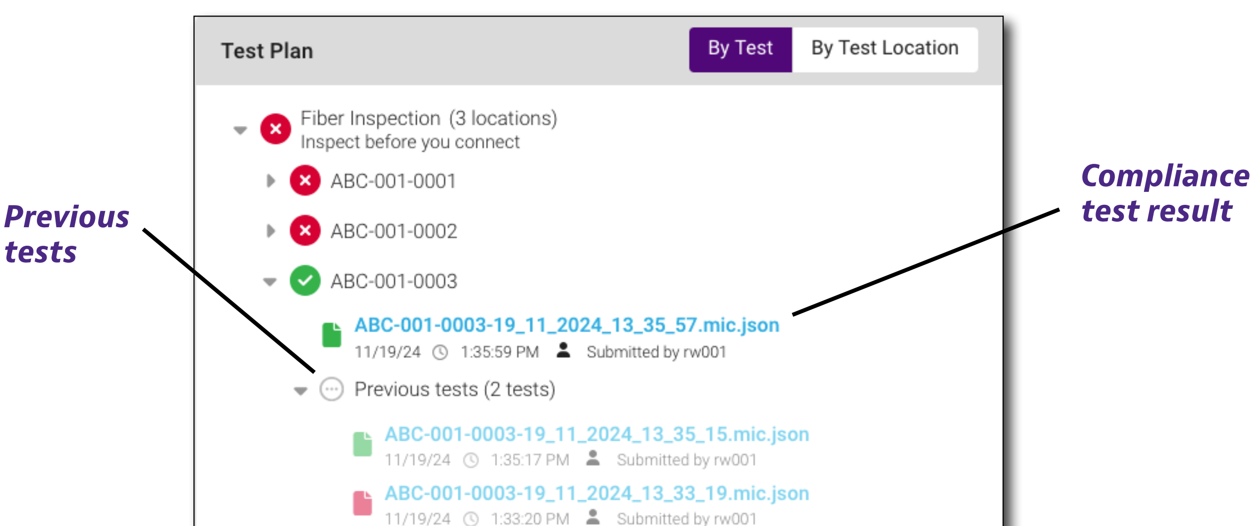
  Job test results are displayed in the Test Plan section. You can expand to view the test status (pass/fail) and click on uploaded test result files to view them (JSReport view of the result file will open in a new tab).

  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**.



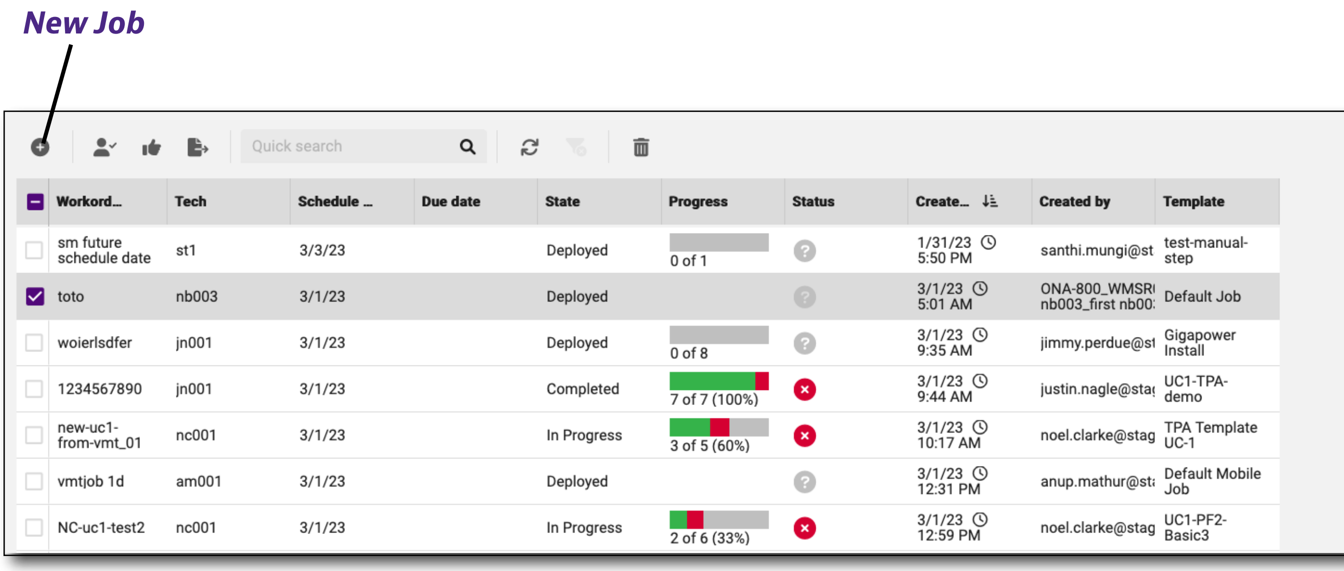

**Job detail, including job state, tech assigned, template, test plans, etc.**

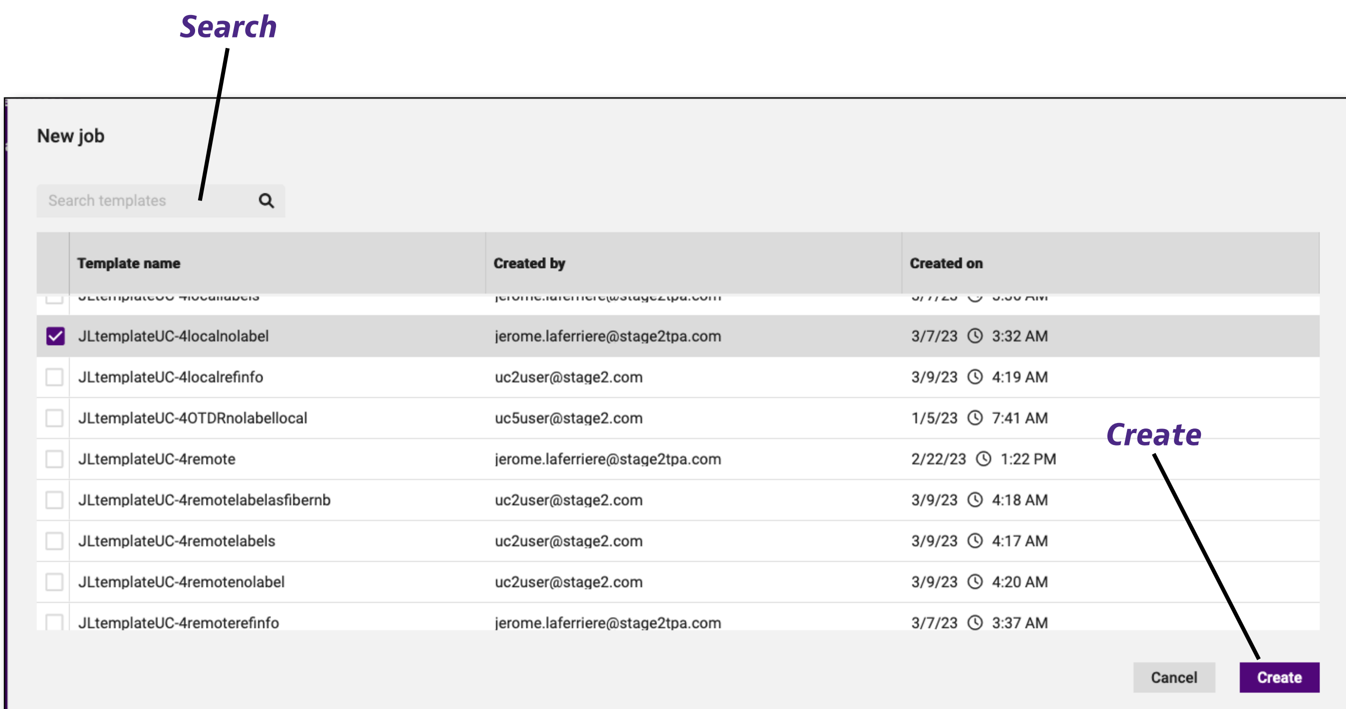



**Multiple tests for a location, showing previous tests and compliance test step in bold**

# Creating a job

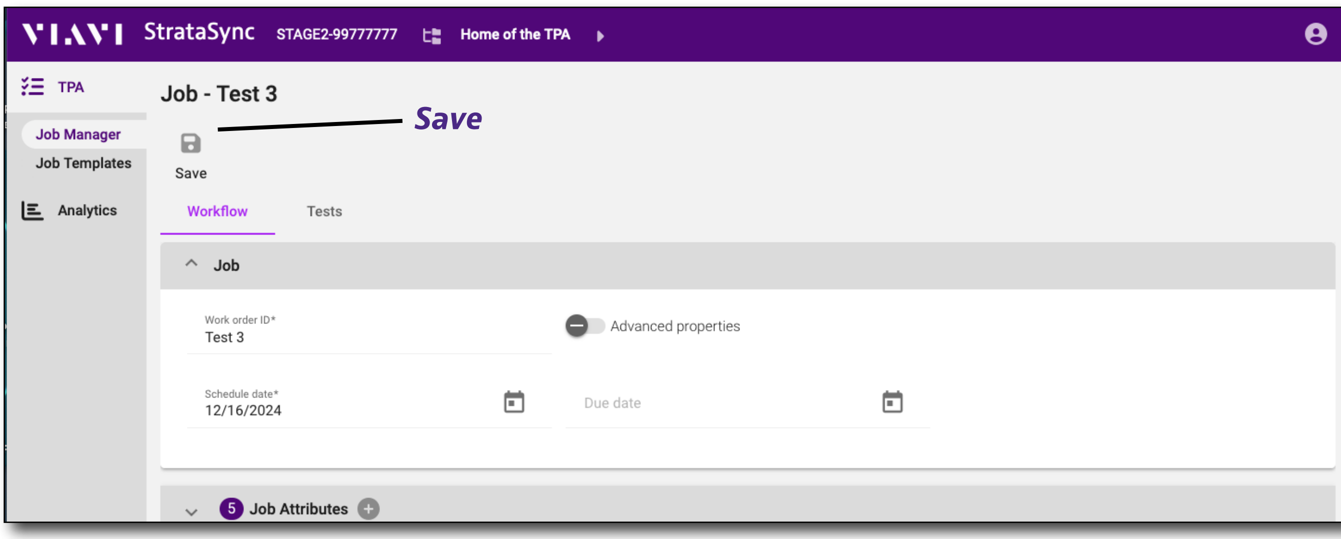
1. From the Job Manager, select **New Job**. The New Job screen appears.
2. Choose the template you want to use or use the search box to find it. Then select **Create**. The Job screen appears.



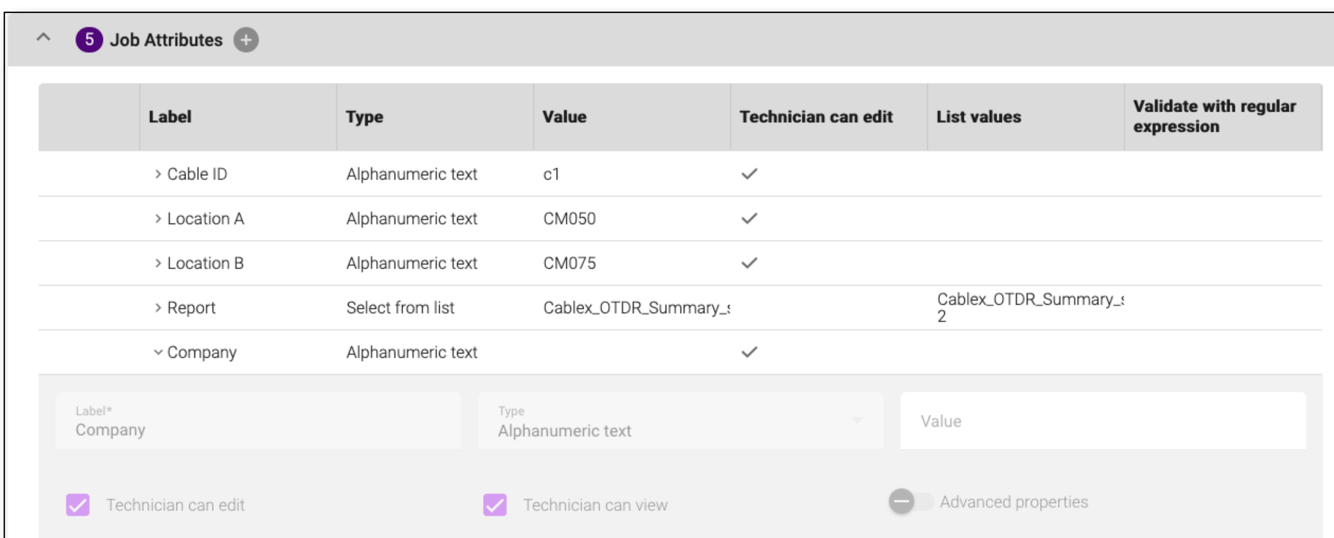




**New Job screen**

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.

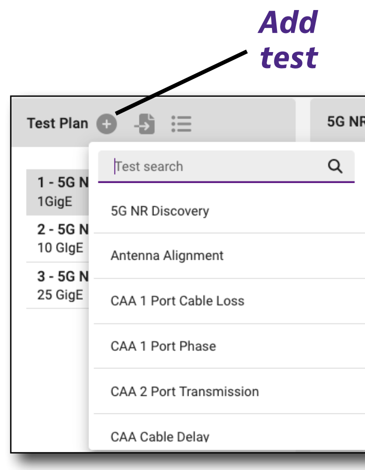
1. From the New Job screen, select the **Tests** tab. The Test Plan screen appears.

   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.

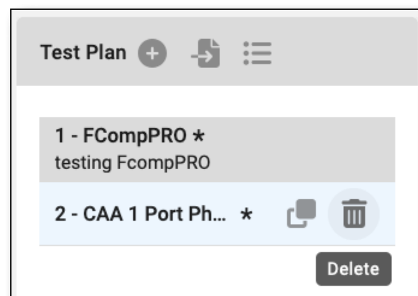
2. Select **Add test** to add additional tests, and select **Test required for compliance** for each test, as needed. You can also import test location labels for all test plans or auto-generate them (see the next section).

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

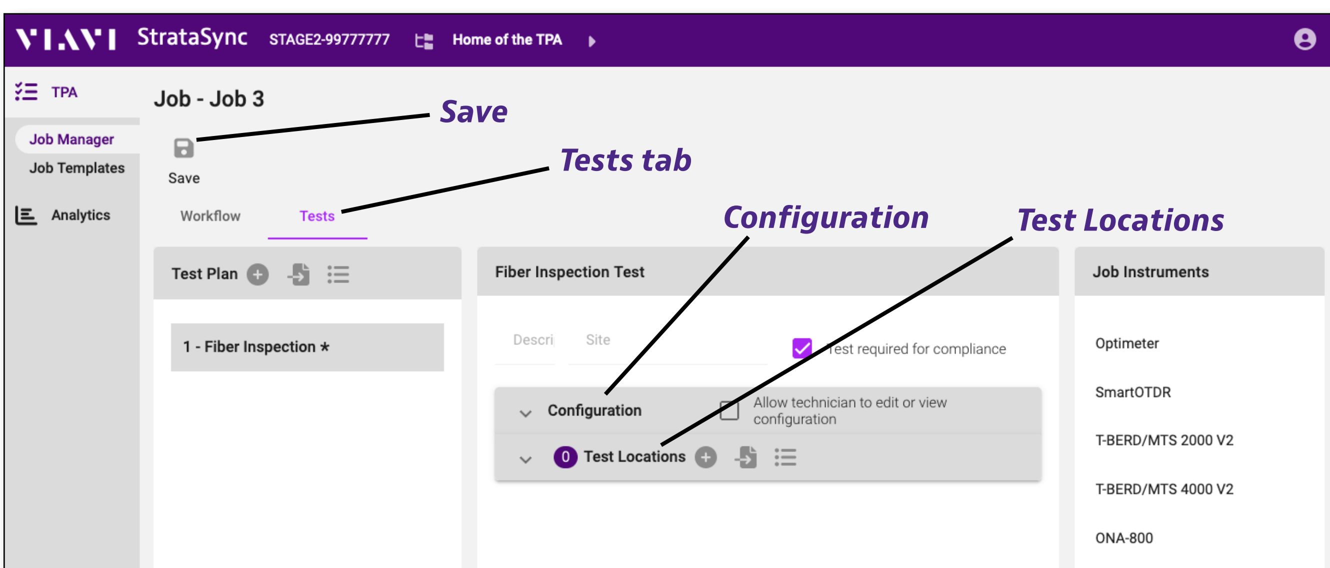
   - To duplicate a test, hover over the row and select the **Duplicate** button.
   - To delete a test, hover over the row and select the **Delete** button.
   - To move a test, hover over the row and drag up or down.




**Adding tests**

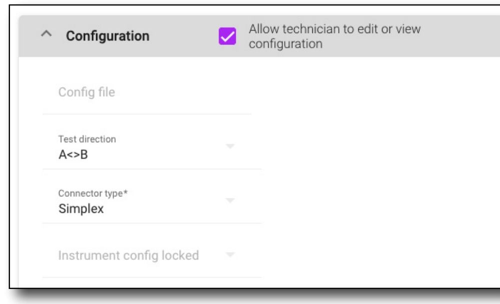



**Deleting tests**




**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.




Adding test location configurations

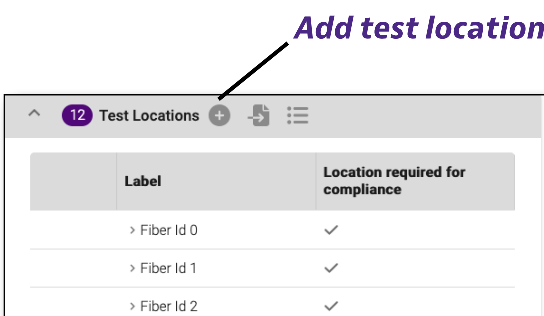
4. Next to **Test Locations**, select **Add test location** to add additonal locations, as needed.

   Enter a unique label for each location.

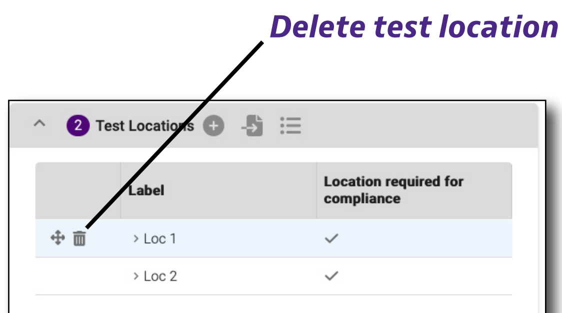
   You can also import test location labels or auto-generate them (see the next section).

   - To raname 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.

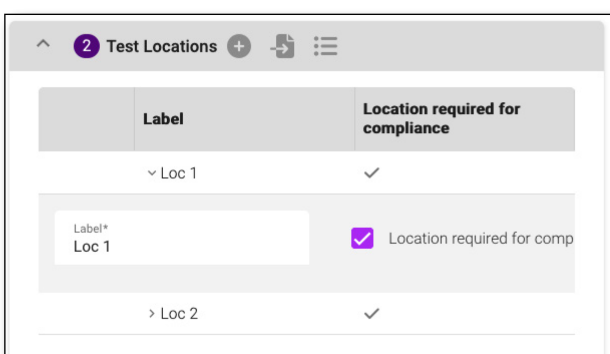
5. When done, select **Save** at the top. The job will be added to the Jobs List.




Adding test 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.

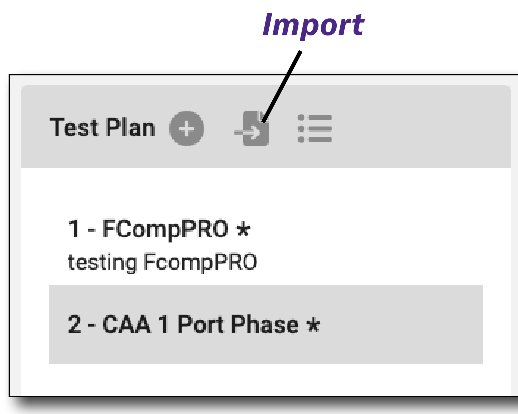
## *Importing labels*

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.

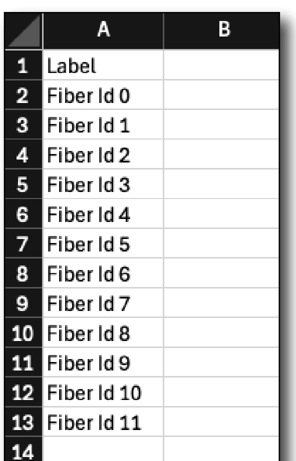
1. From the Test Plan screen, select **Import test location labels**. A screen appears to choose the CSV file you want to import. Once imported, the labels will be added to your job.

   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.

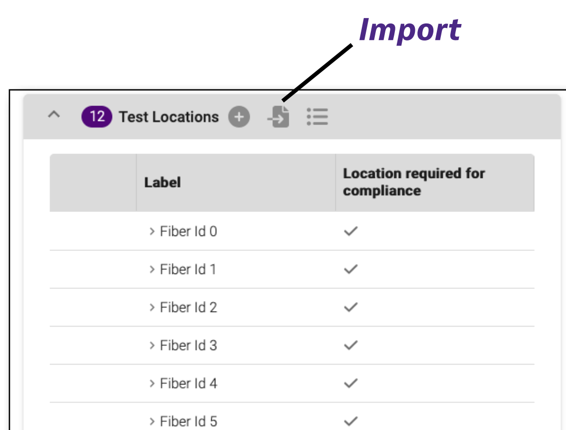



Import test location labels for all test plans

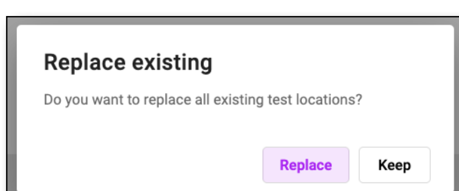


| | A | B |
|---|---|---|
| 1 | Label | |
| 2 | Fiber Id 0 | |
| 3 | Fiber Id 1 | |
| 4 | Fiber Id 2 | |
| 5 | Fiber Id 3 | |
| 6 | Fiber Id 4 | |
| 7 | Fiber Id 5 | |
| 8 | Fiber Id 6 | |
| 9 | Fiber Id 7 | |
| 10 | Fiber Id 8 | |
| 11 | Fiber Id 9 | |
| 12 | Fiber Id 10 | |
| 13 | Fiber Id 11 | |
|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

Sample CSV file – Importing test location labels



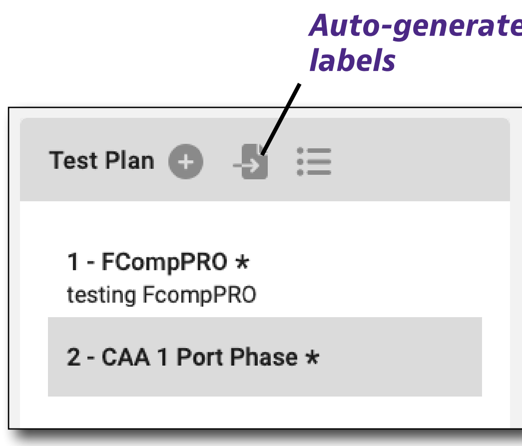

Import test location labels for test steps



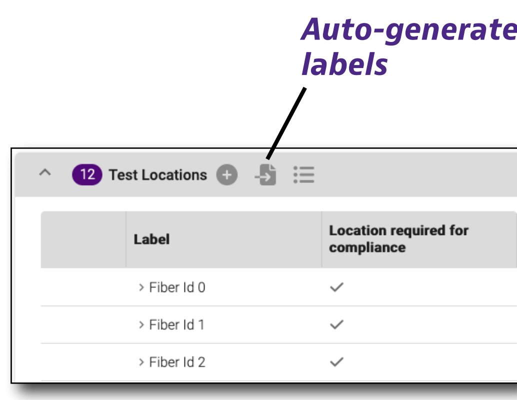
### *Auto-generating labels*

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).

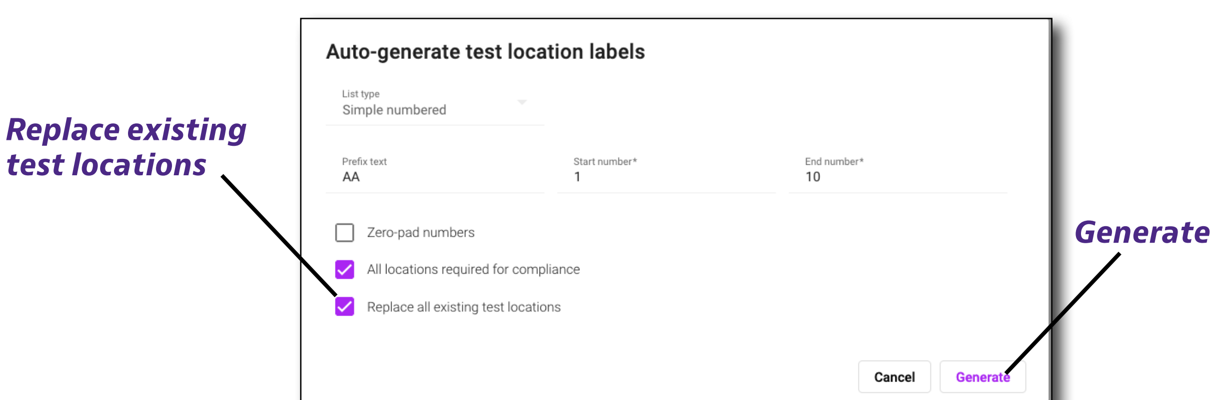
1. From the Test Plan screen, select **Auto-generate test location labels**. The Auto-generate test location labels screen appears.
2. From the **List type** dropdown, choose **Simple numbered** or **Sequential pattern**.
    - If you already have labels added, uncheck **Replace all existing test locations** 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.



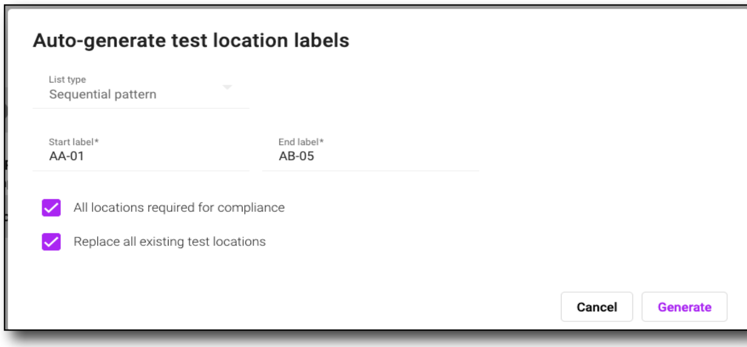

Auto-generate test location labels for all test plans



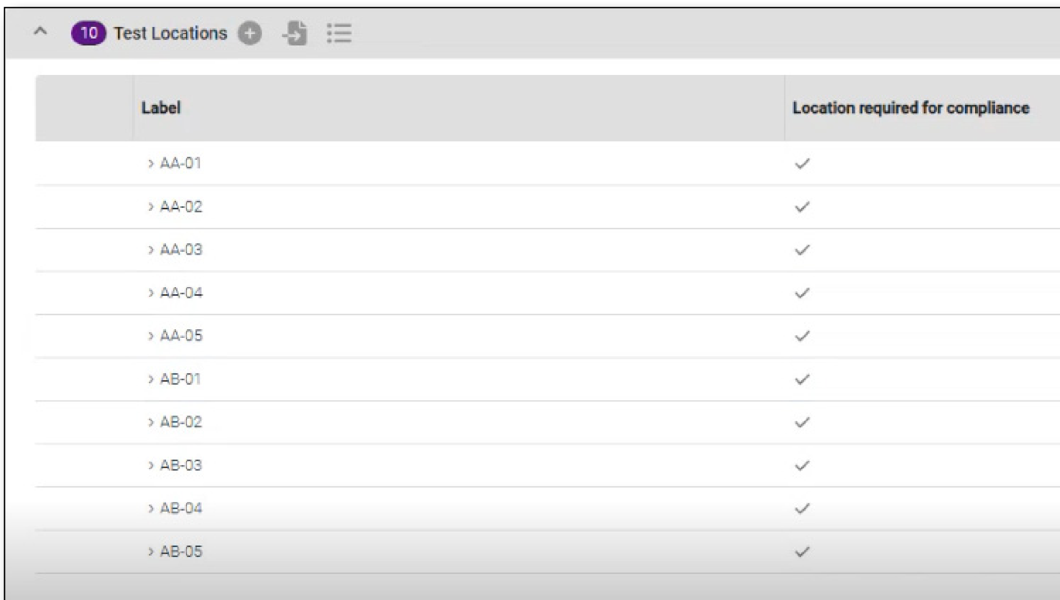

Auto-generate test location labels for test steps




Simple numbered labels




**Sequential pattern labels**




**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.

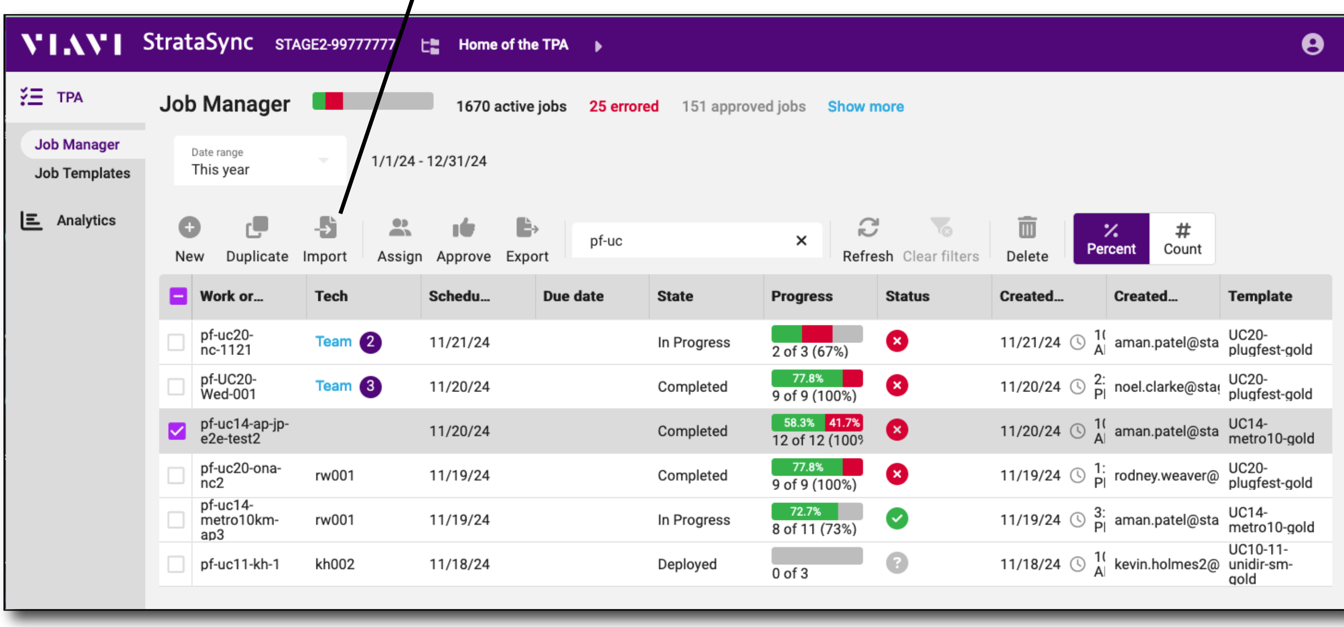
The feature requires a SS-TPA-JOB-IMPORT-nYR subscription in addition to a SS-PRO-nYR (or a non-expired SS-ENT-WRKFLW-nYR) subscription.

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***




**Jobs List**

| | A | B | C | D | E | F | G | H |
|---|---|---|---|---|---|---|---|---|
| 1 | workOrderId | techIds | 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 | Alphanumieric Text | Alphanumieric Text | Alphanumieric Text | Alphanumieric Text |
| 8 | 100 jobs max | | | | | | | |
| 9 | | | | | | | | |

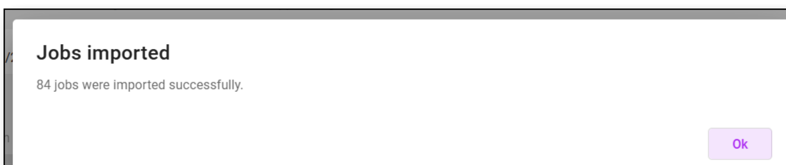
| I | J | K | L | M |
|---|---|---|---|---|
| jobComment | testLocationA | testLocationB | typeName | testLocations |
| New Job Imported | locA001 | locB001 | OTDR 0611 | Loc001 |
| | | | | Loc002 |
| New Job Imported | locA001 | locB001 | OTDR 0611 | Loc001 |
| | | | | |
| Optional | Optional | Optional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

**Sample CSV file – Importing jobs**

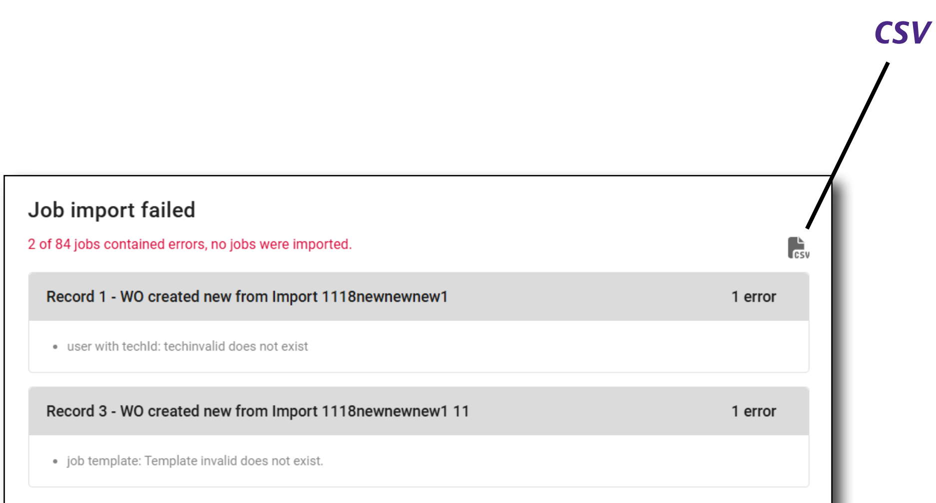
StrataSync validates the CSV file before importing jobs, and if there are any errors, no jobs are imported.

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

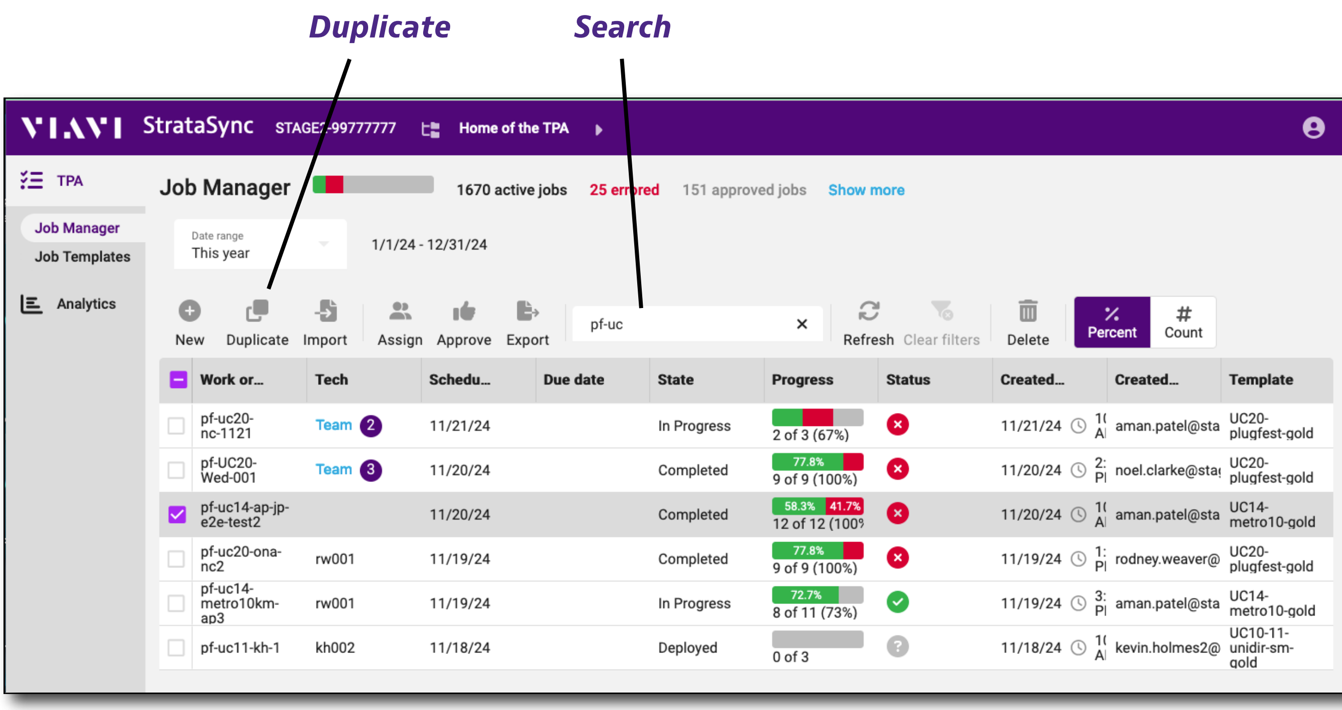
- 100 jobs max can be imported via a single CSV file.
- To minimize chance for timing out during import (after 5 mins), you should limit to 10,000 total max test locations for entire import session.

  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

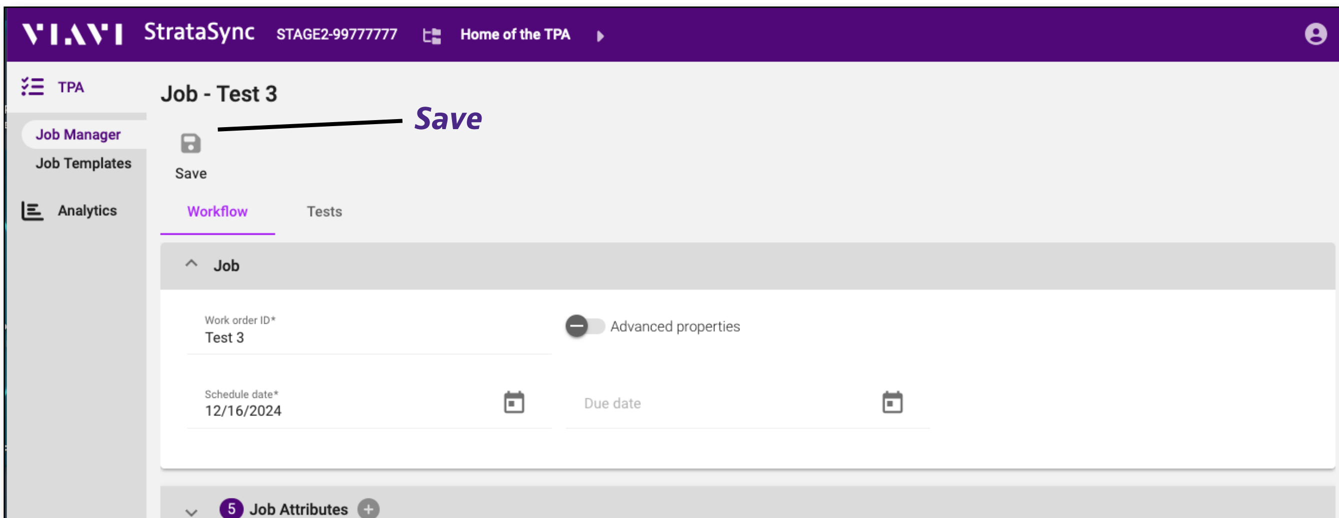
Duplicating a job allows you to modify an existing job to save as a new one. A new work order ID must be used for the duplicated job.

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.

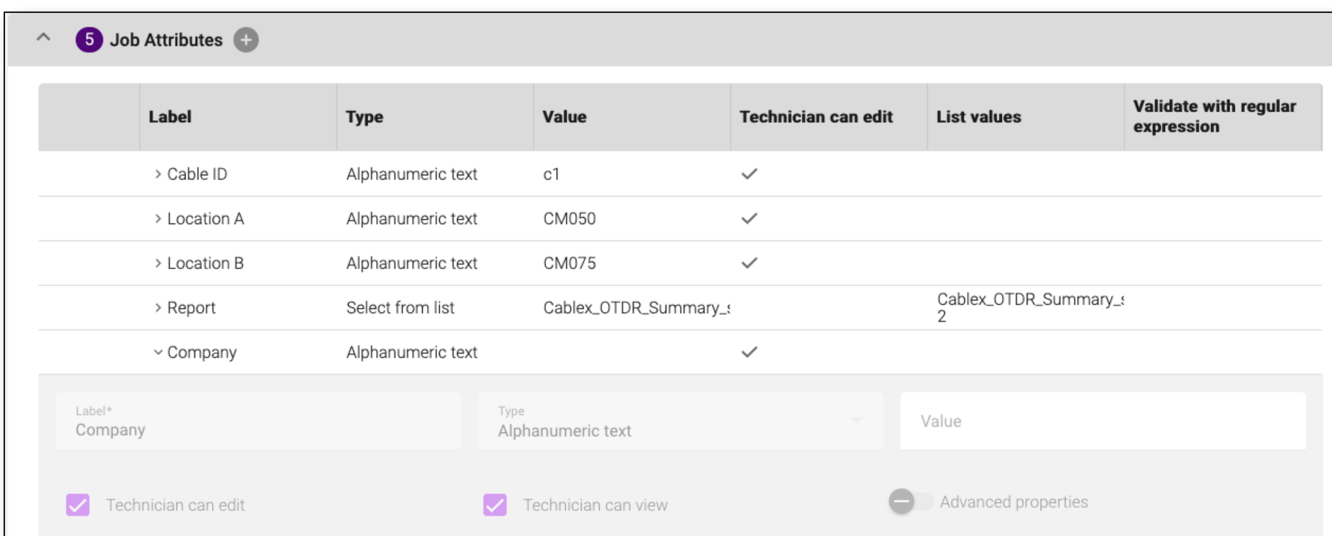



**Jobs List**

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.



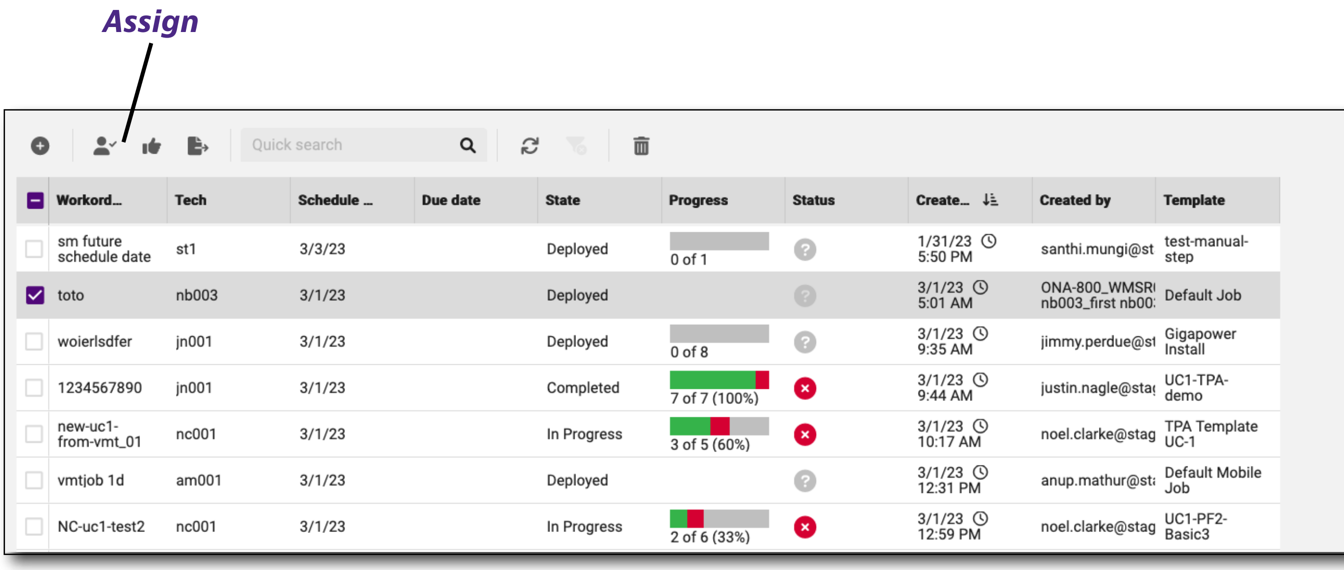

Duplicating a job

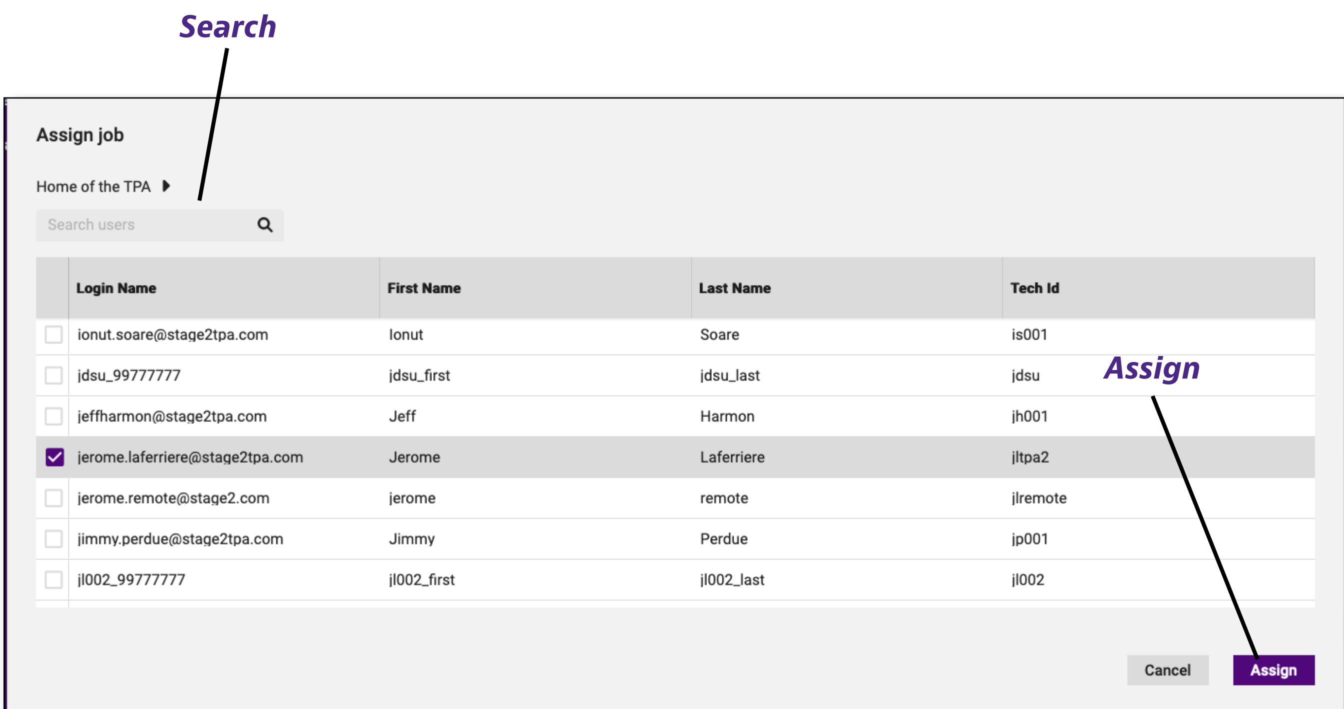



Adding job attributes

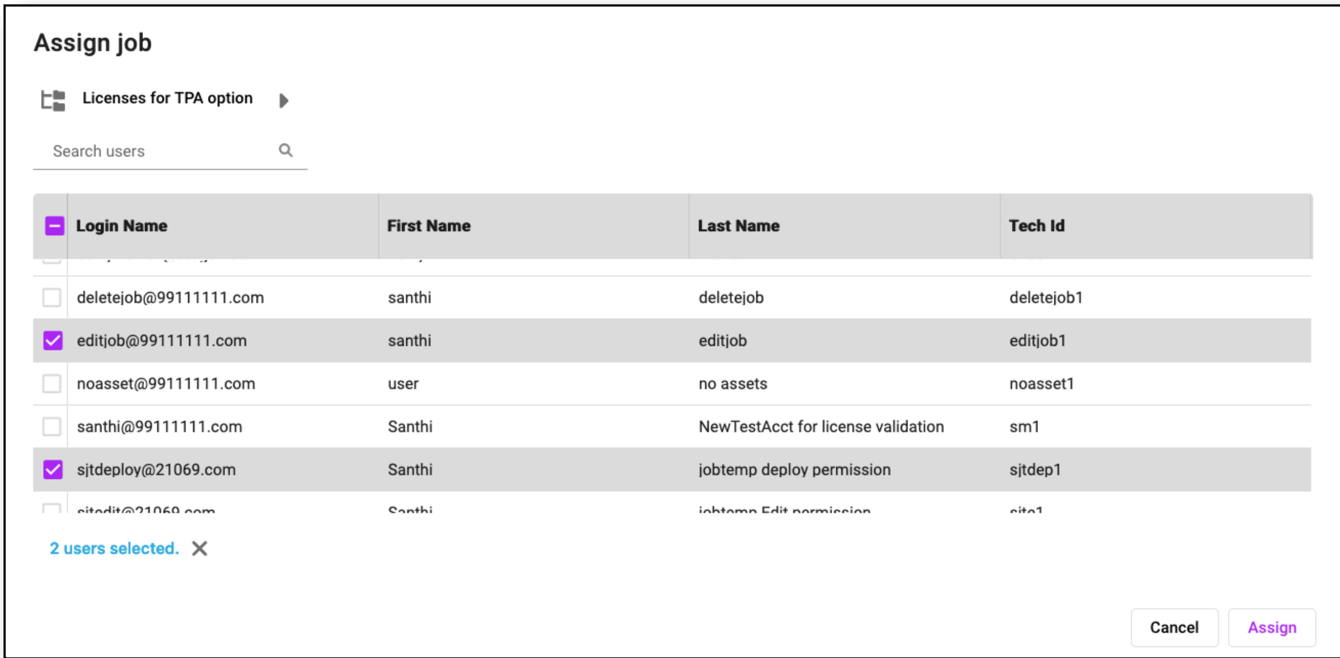
# Assigning a job

1. From the Job Manager, select the job(s) you want to assign, then select **Assign**. The Assign Job screen appears.
2. 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.



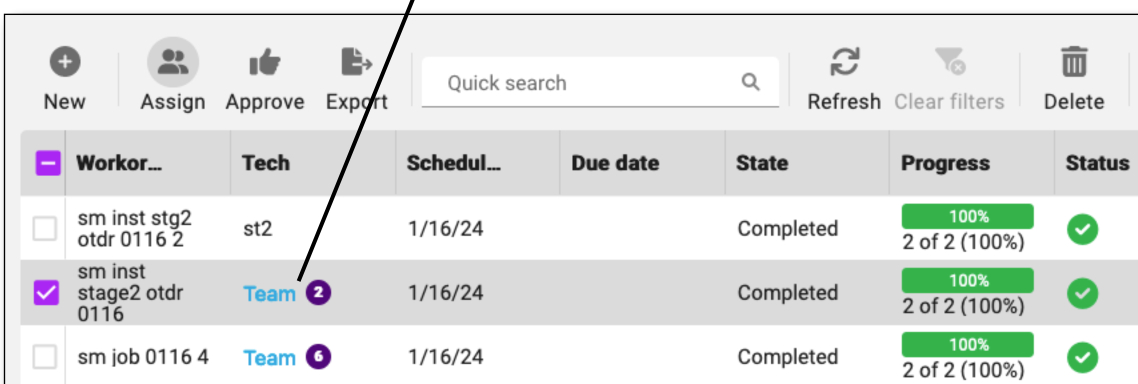




**Assign job screen**

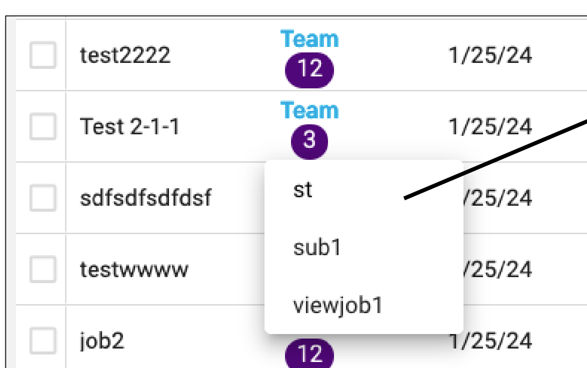



**Assigning team jobs**

***Team job (with number of techs)***




***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

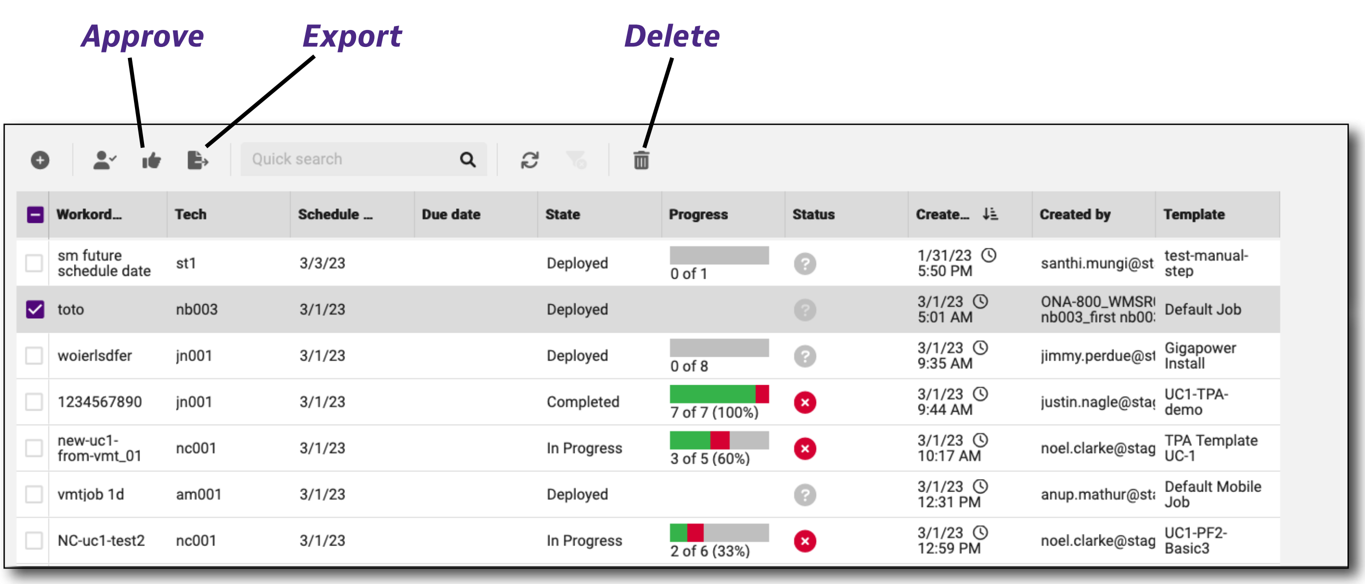
From the Job Manager, select the job(s) you want to export, then select **Export**. The JSON file(s) will download to your desktop.

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).



# Job Templates List

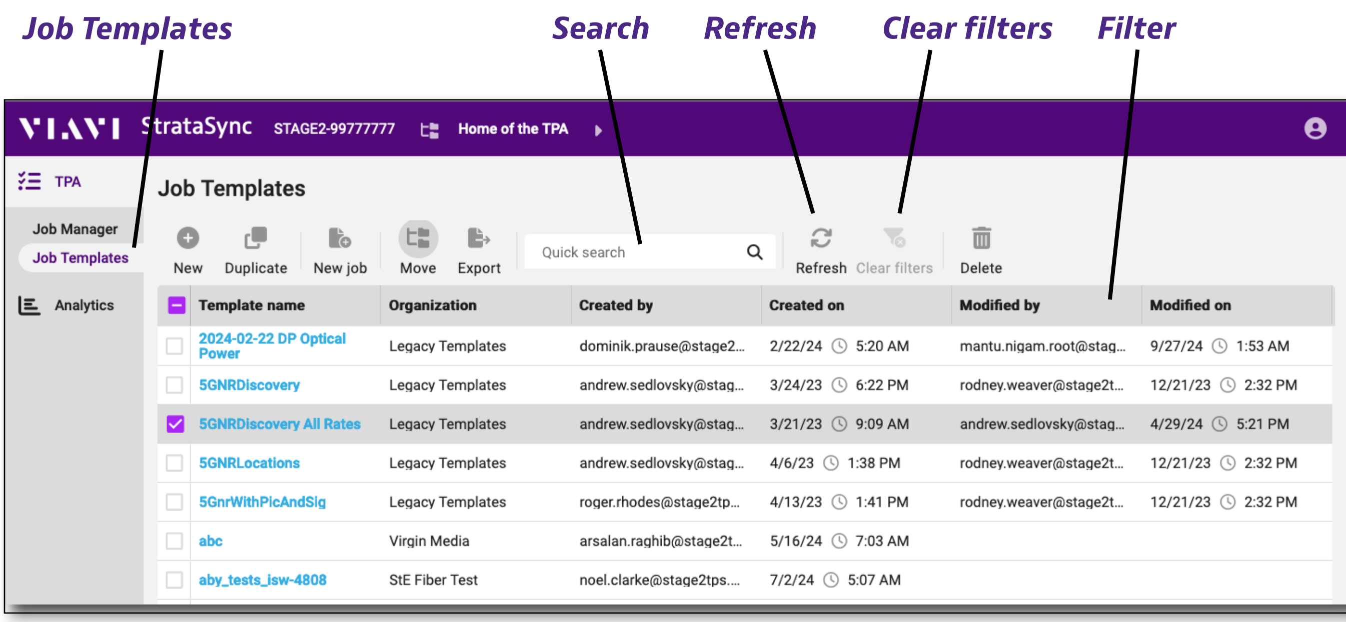
The Job Templates List provides detail on the current templates, based on the filters used in the Job Templates dashboard.

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**.




**Templates List**


**Column sort filters and dropdowns**

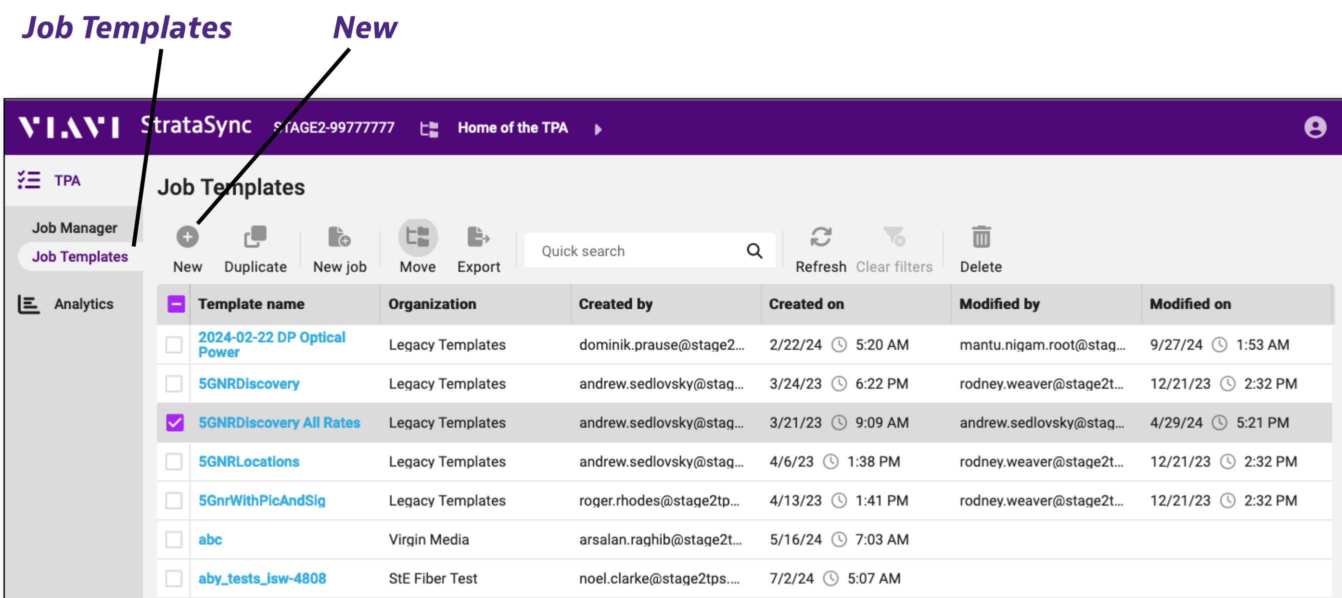
# Creating a job template

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.



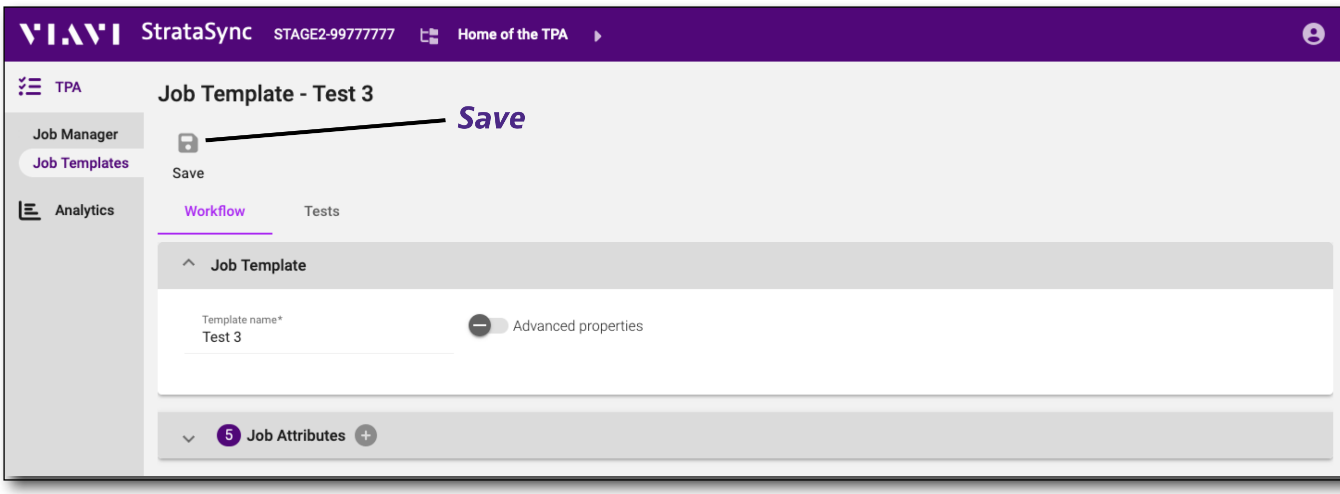

**Templates List**

> ***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.***

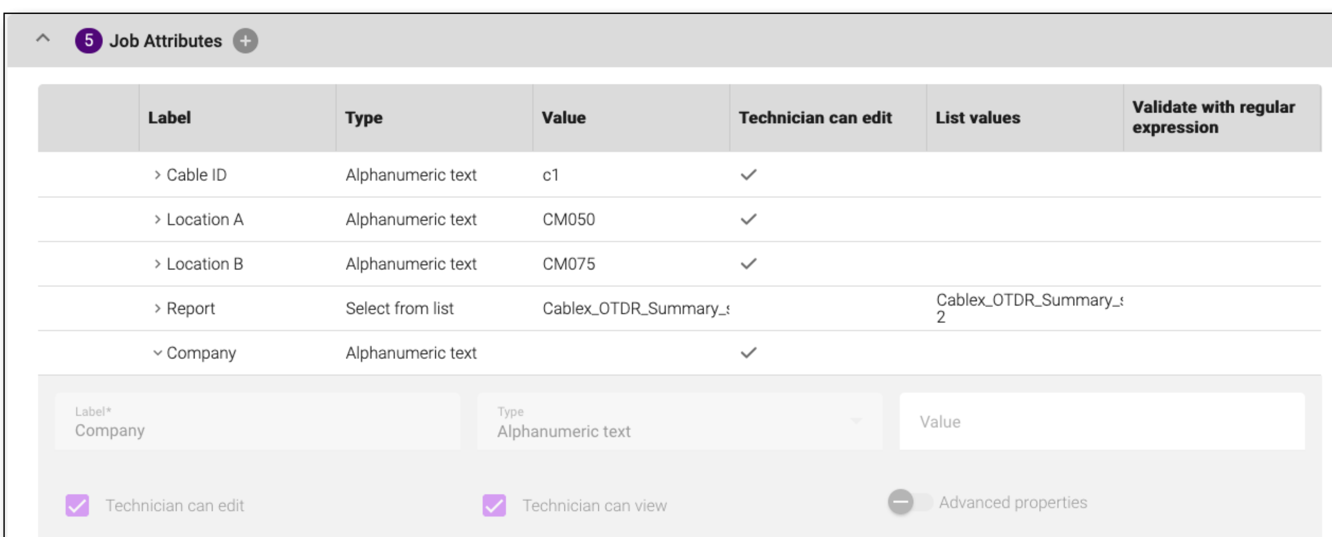
3. Enter a unique **Template name** (required). You can also enter a work order label and contractor ID.
4. Use the **Job Atrributes** section to add additional detail, such as company name, tech name, job address, locations, job comments, etc. The **Custom** option allows you to create your own attributes,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

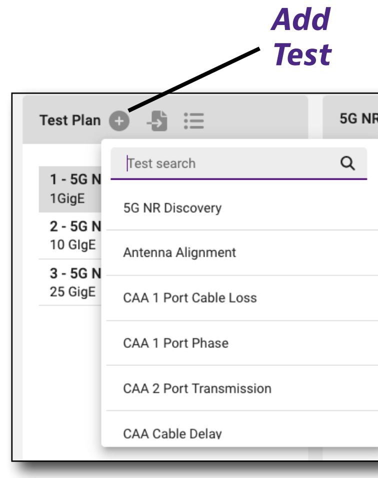



**Adding job attributes**

# Adding tests to a job template

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

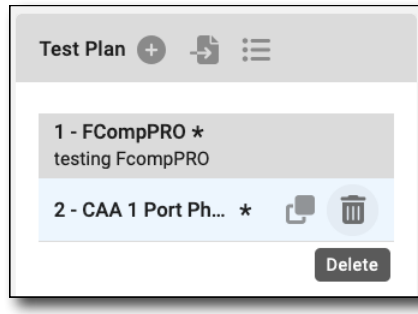
   The current tests for the job are on the left, the middle shows details for the selected test step, and the right side shows a comprehensive list of all valid instruments that can be used for the job, where transparent instruments cannot be used for the selected test step.

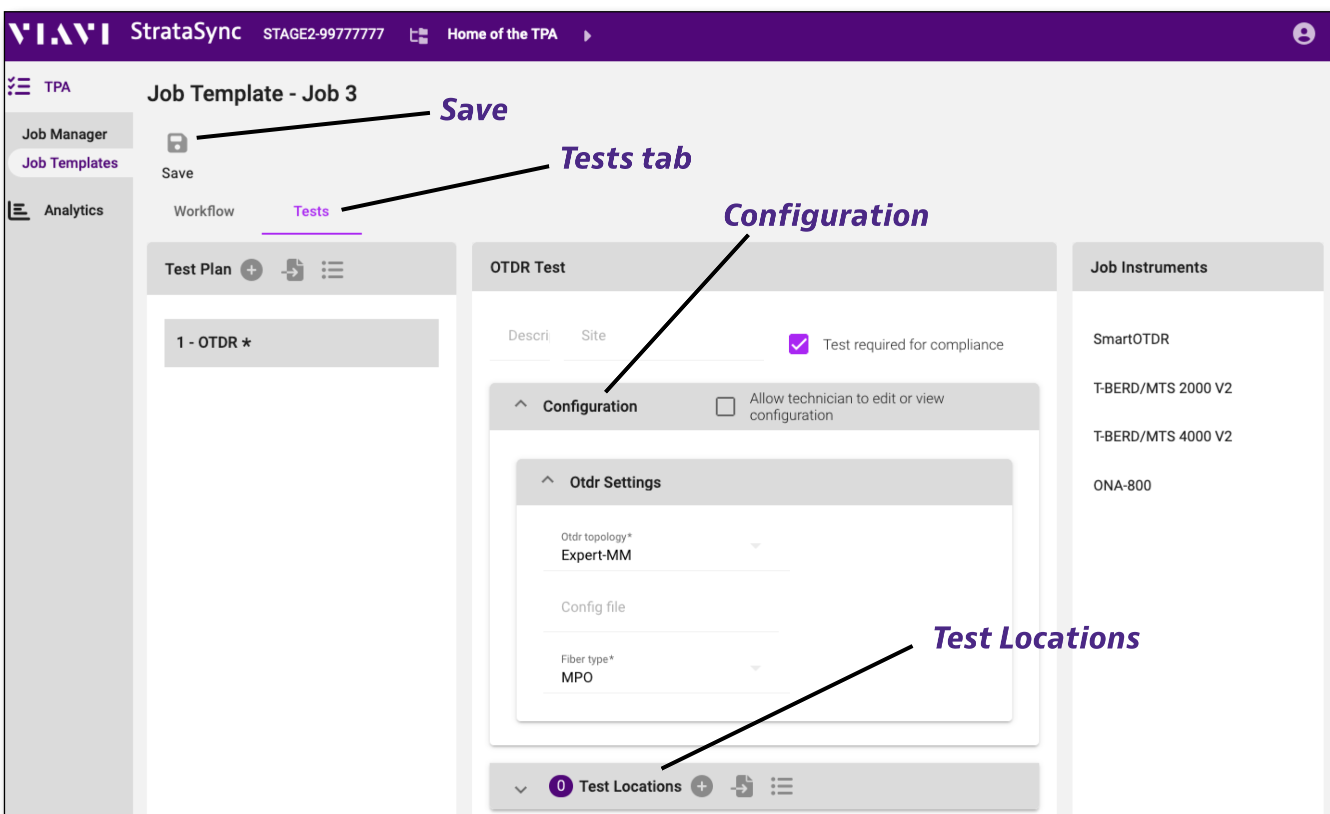



2. Select **Add test** to add additional tests, and select **Test required for compliance** for each test, as needed. You can also import test location labels for all test plans or auto-generate them (see the next section).

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

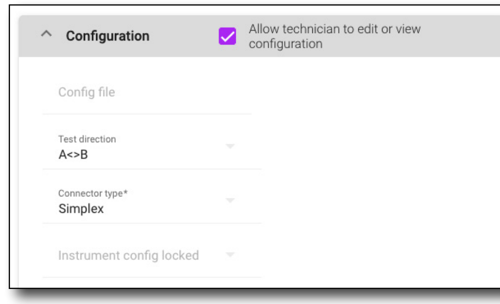
   - To duplicate a test, hover over the row and select the **Duplicate** button.
   - To delete a test, hover over the row and select the **Delete** button.
   - To move a test, hover over the row and drag up or down.




**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.




**Adding test location configurations**

4. Next to **Test Locations**, select **Add test location** to add additional locations, as needed.

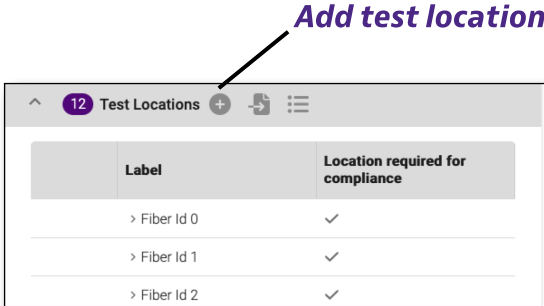
   Enter a unique label for each location.

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

   - To raname 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.

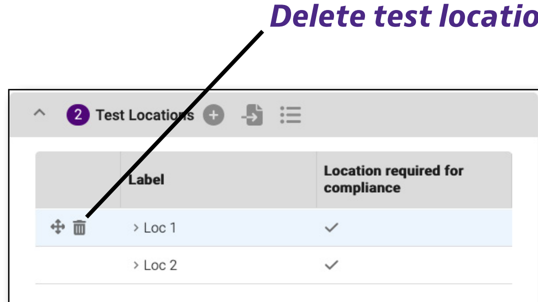
5. When done, select **Save** at the top. The template will be added to the Templates List.

*Add test location*

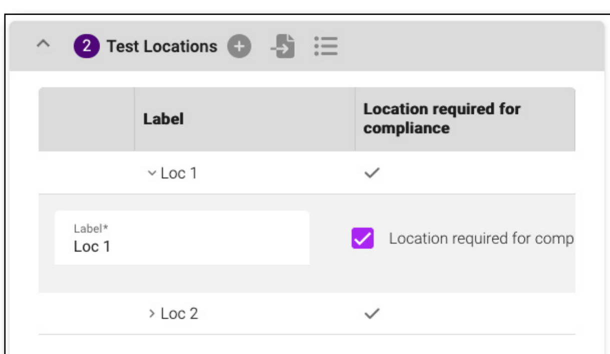



**Adding test locations**

*Delete test location*




**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.

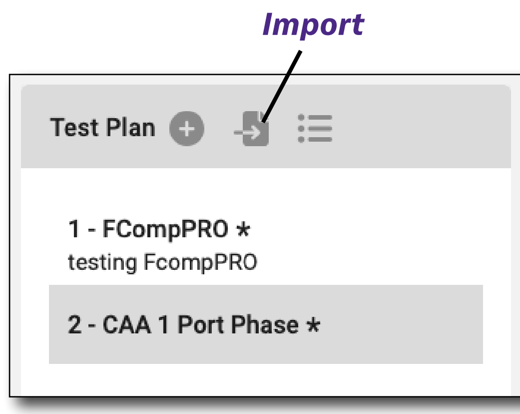
### *Importing labels*

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.

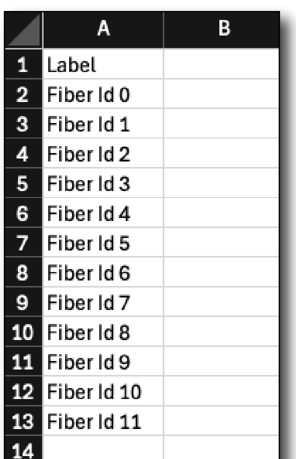
1. From the Test Plan screen, select **Import test location labels**. A screen appears to choose the CSV file you want to import. Once imported, the labels will be added to your job.

   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.

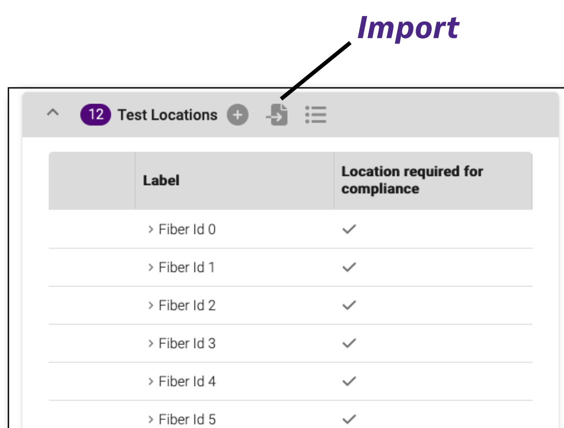



Import test location labels for all test plans

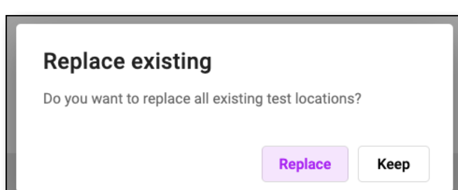


| | A | B |
|---|---|---|
| 1 | Label | |
| 2 | Fiber Id 0 | |
| 3 | Fiber Id 1 | |
| 4 | Fiber Id 2 | |
| 5 | Fiber Id 3 | |
| 6 | Fiber Id 4 | |
| 7 | Fiber Id 5 | |
| 8 | Fiber Id 6 | |
| 9 | Fiber Id 7 | |
| 10 | Fiber Id 8 | |
| 11 | Fiber Id 9 | |
| 12 | Fiber Id 10 | |
| 13 | Fiber Id 11 | |
|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

Sample CSV file – Importing test location labels



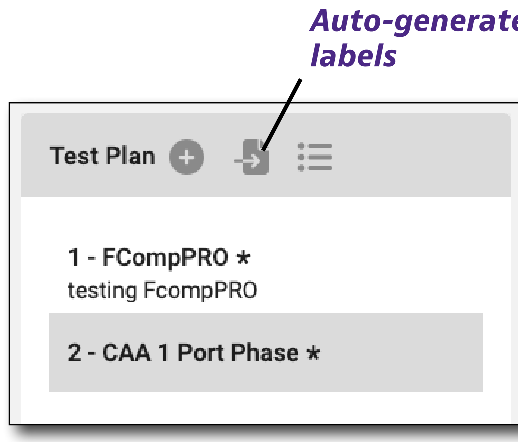

Import test location labels for test steps



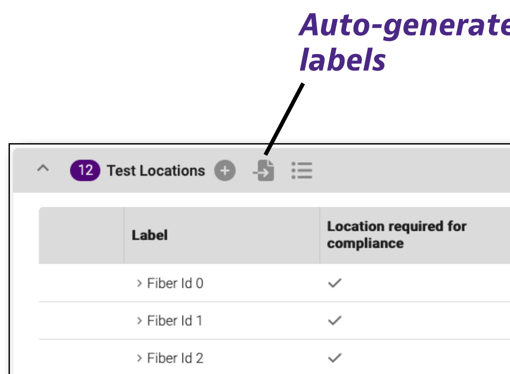
### *Auto-generating labels*

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).

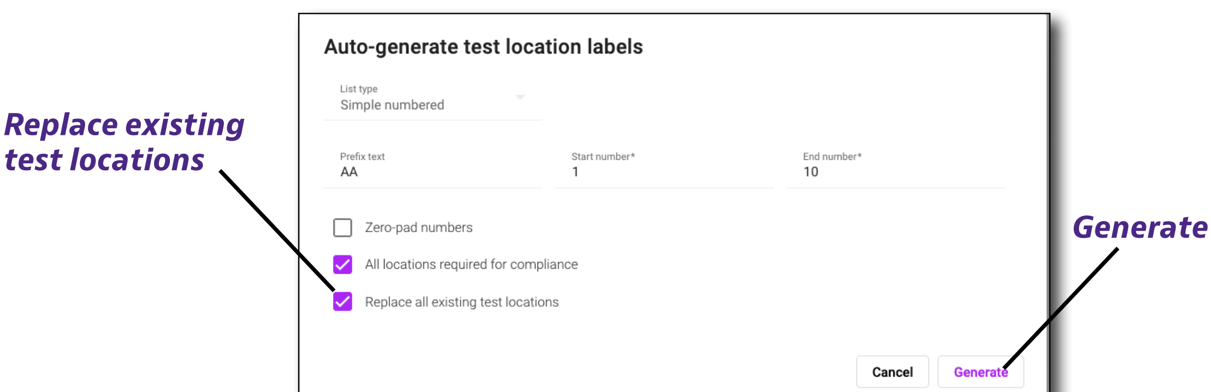
1. From the Test Plan screen, select **Auto-generate test location labels**. The Auto-generate test location labels screen appears.
2. From the **List type** dropdown, choose **Simple numbered** or **Sequential pattern**.
    - If you already have labels added, uncheck **Replace all existing test locations** 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.



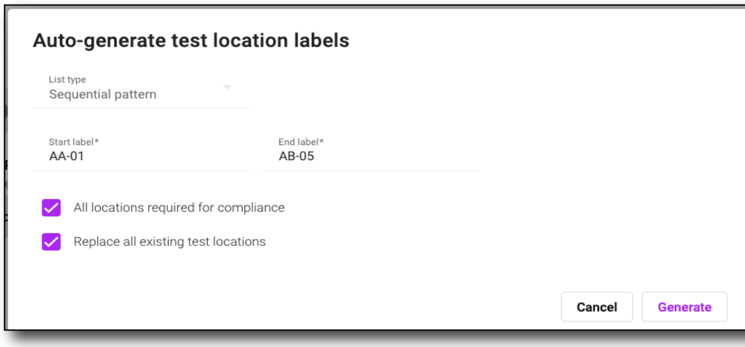

**Auto-generate test location labels for all test plans**



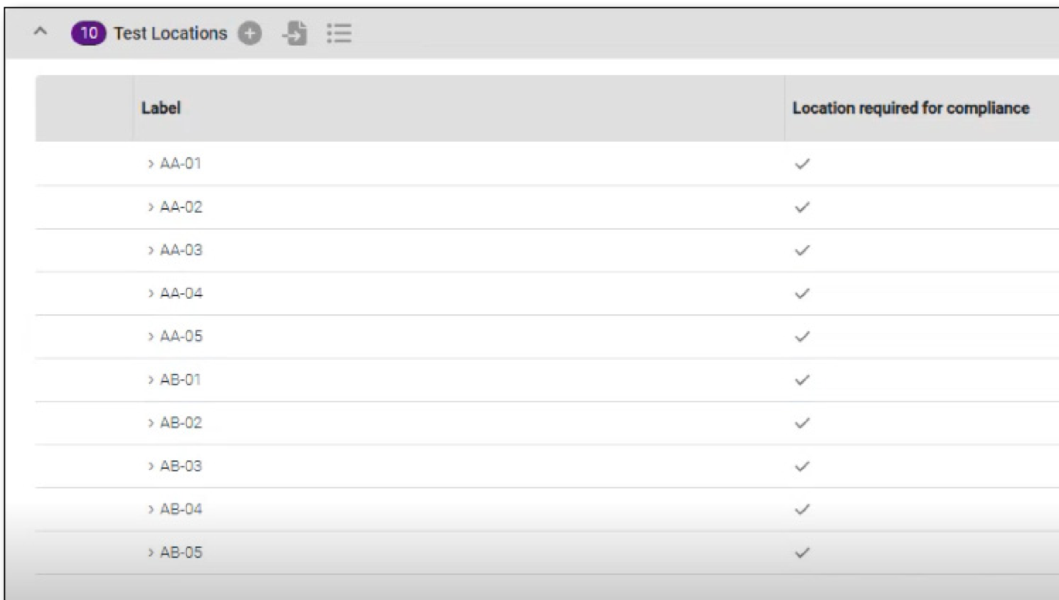

**Auto-generate test location labels for test steps**




**Simple numbered labels**




**Sequential pattern labels**

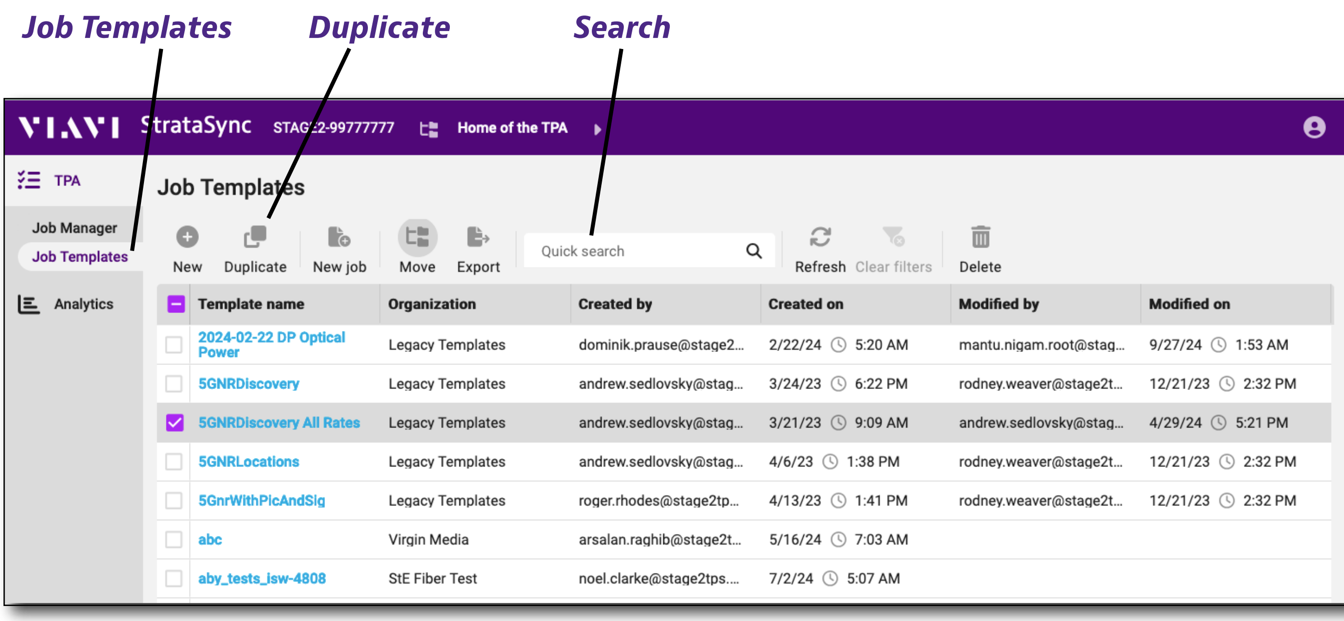



**Sequential pattern labels, using AA-01 to AB-05**

# Duplicating a job template

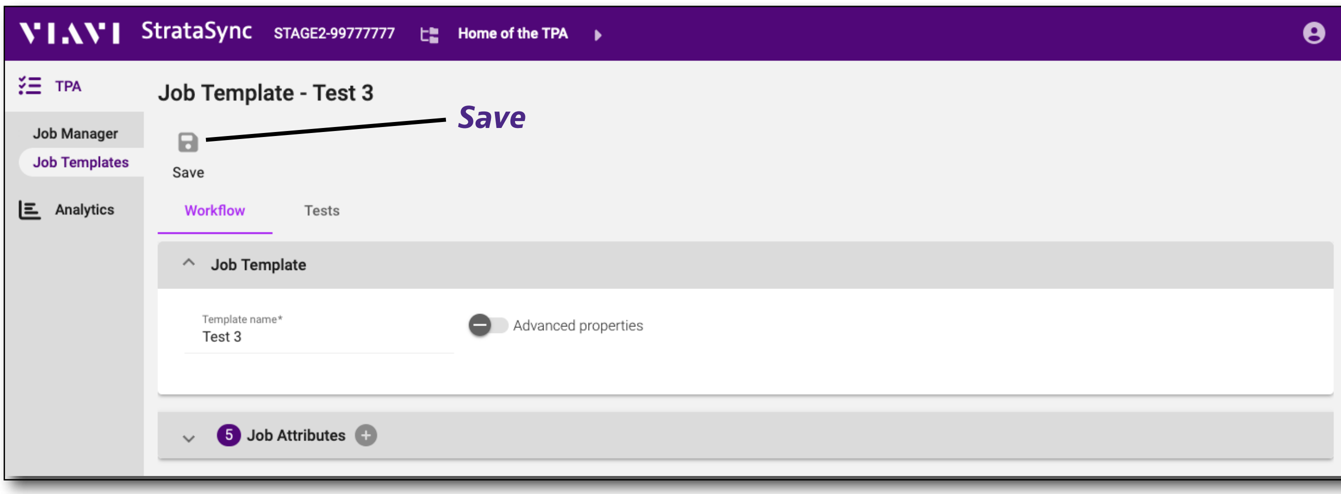
Duplicating a template allows you to modify an existing template to save as a new one.

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.

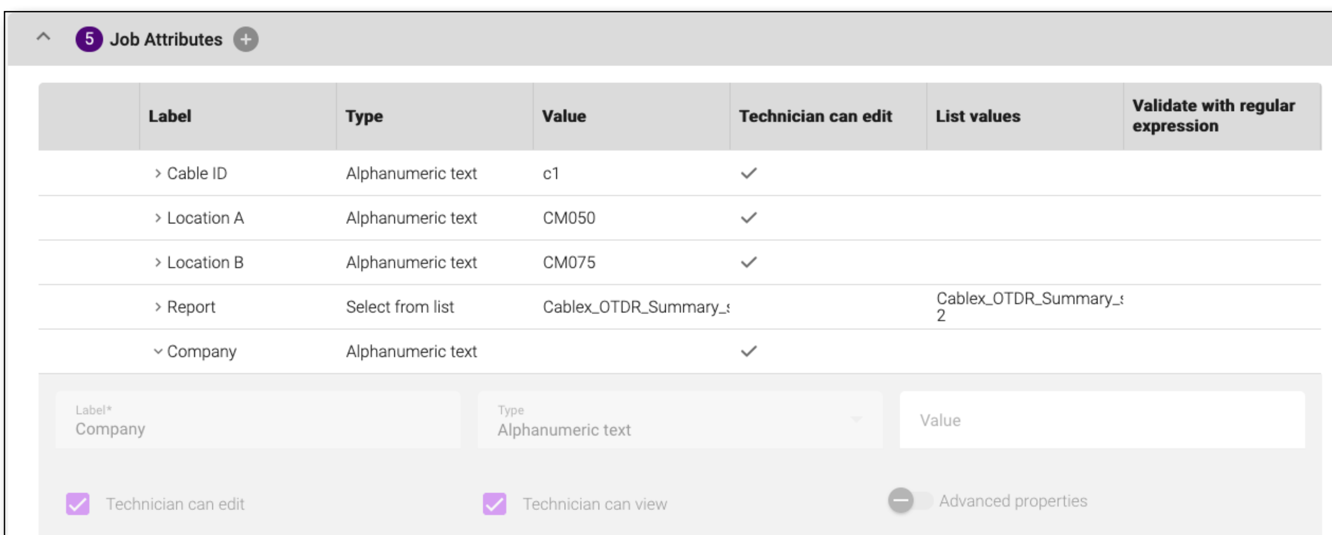



**Templates List**

3. Enter a unique **Template name** (required). You can also enter a work order label and contractor ID.
4. Use the **Job Atrributes** 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.



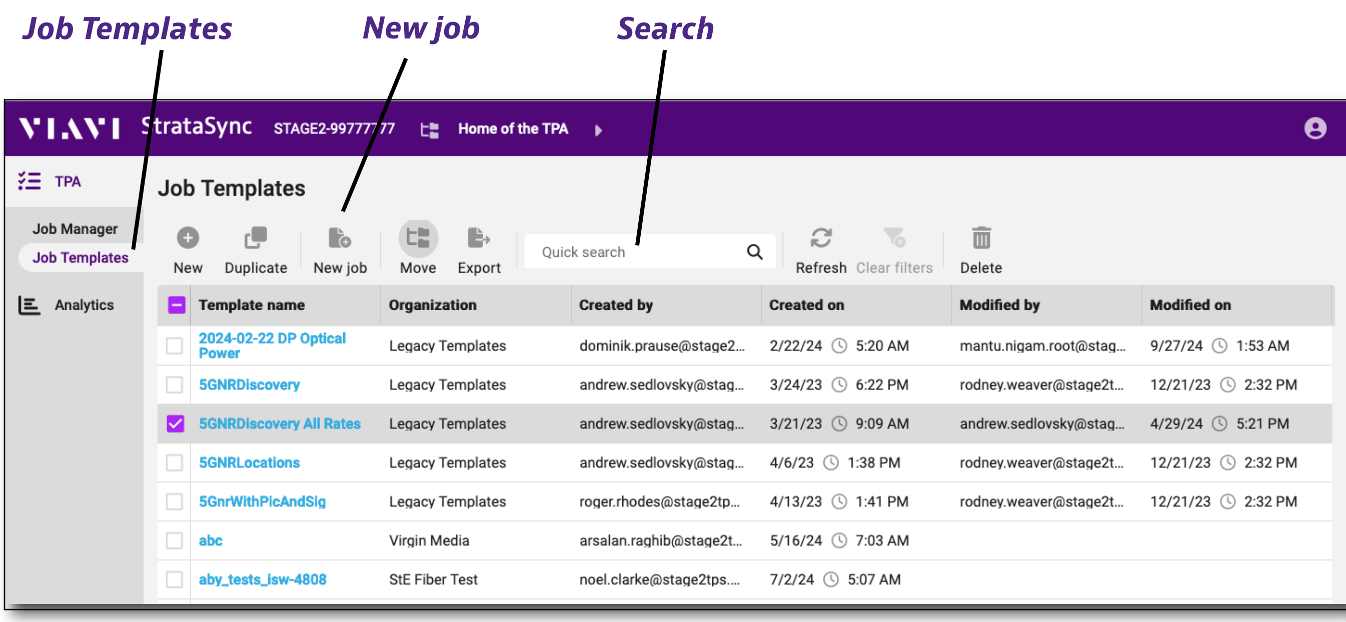

**Duplicating a template**




**Adding job attributes**

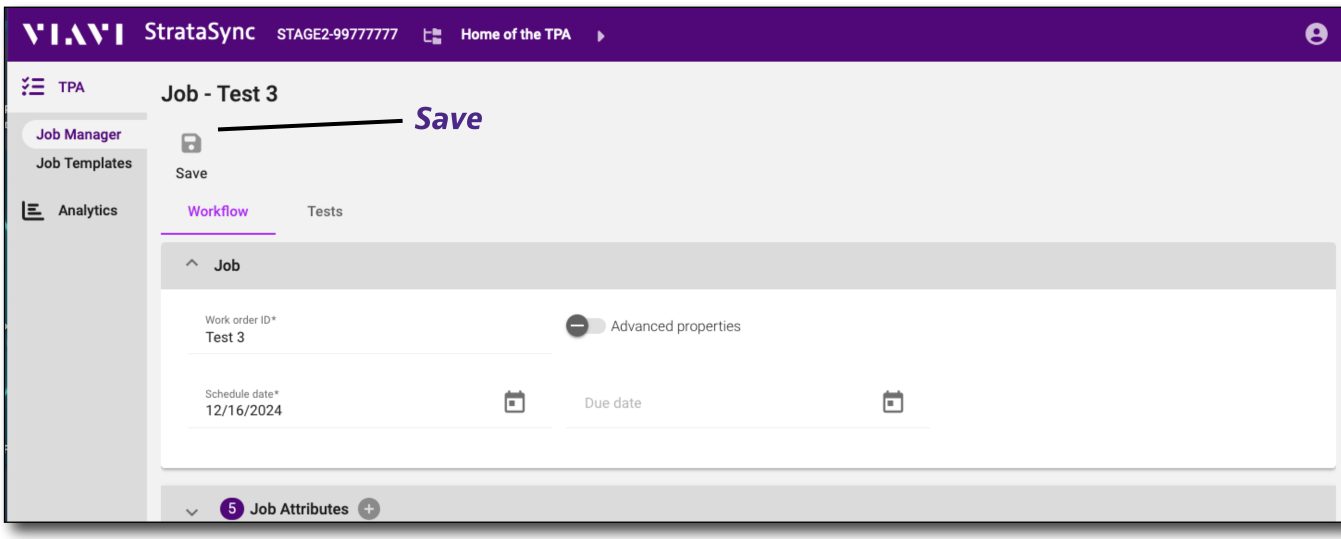
# Creating a job from a template

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.

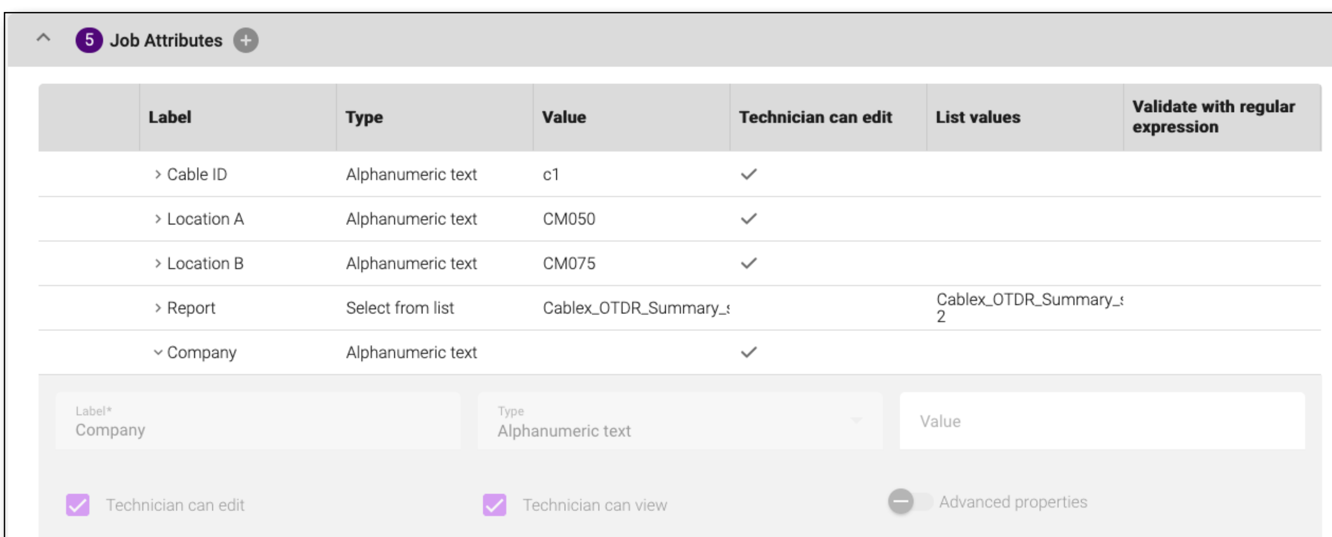



Templates List

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 Atrributes** 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**

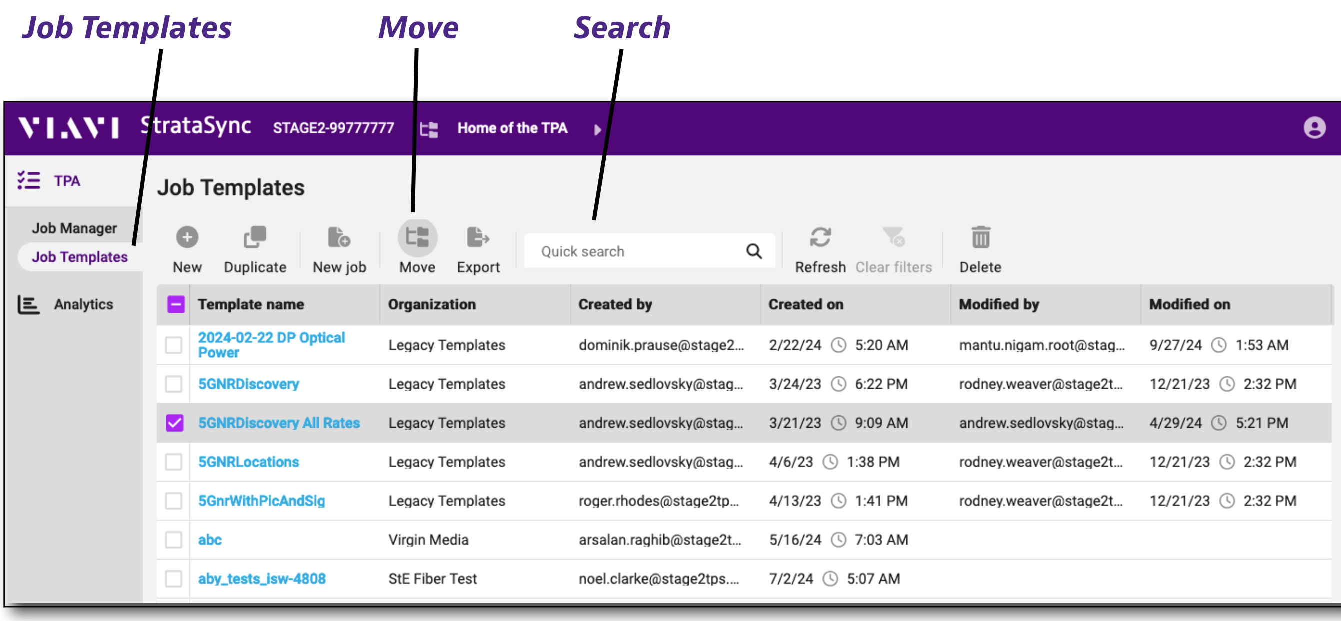



**Adding job attributes**

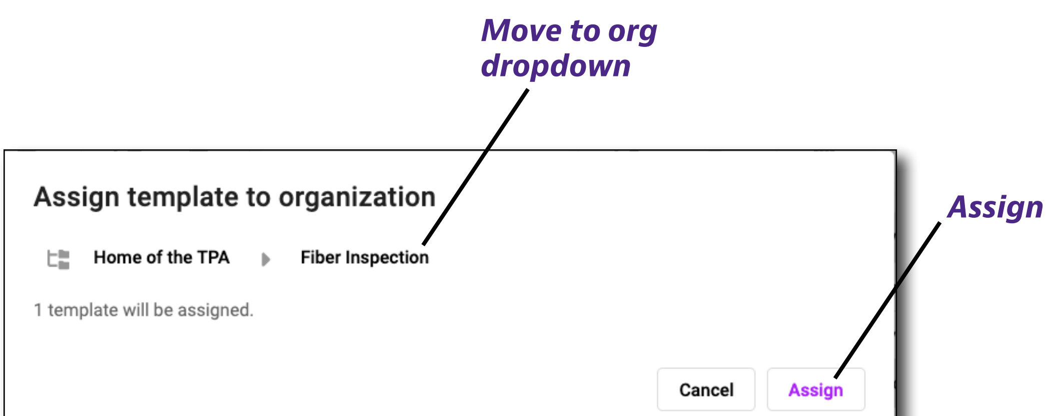
# Moving a job template

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

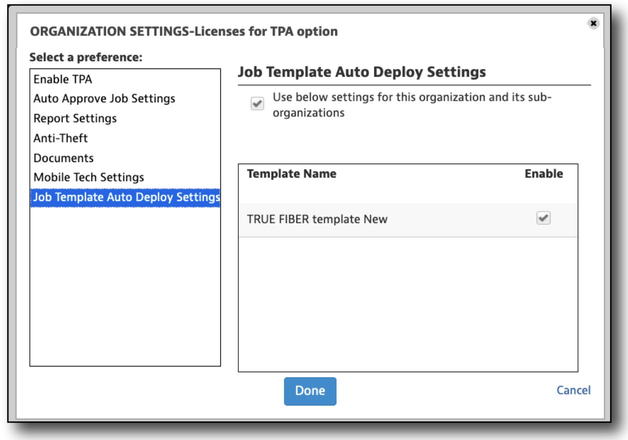


# Deploying a job template

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*.

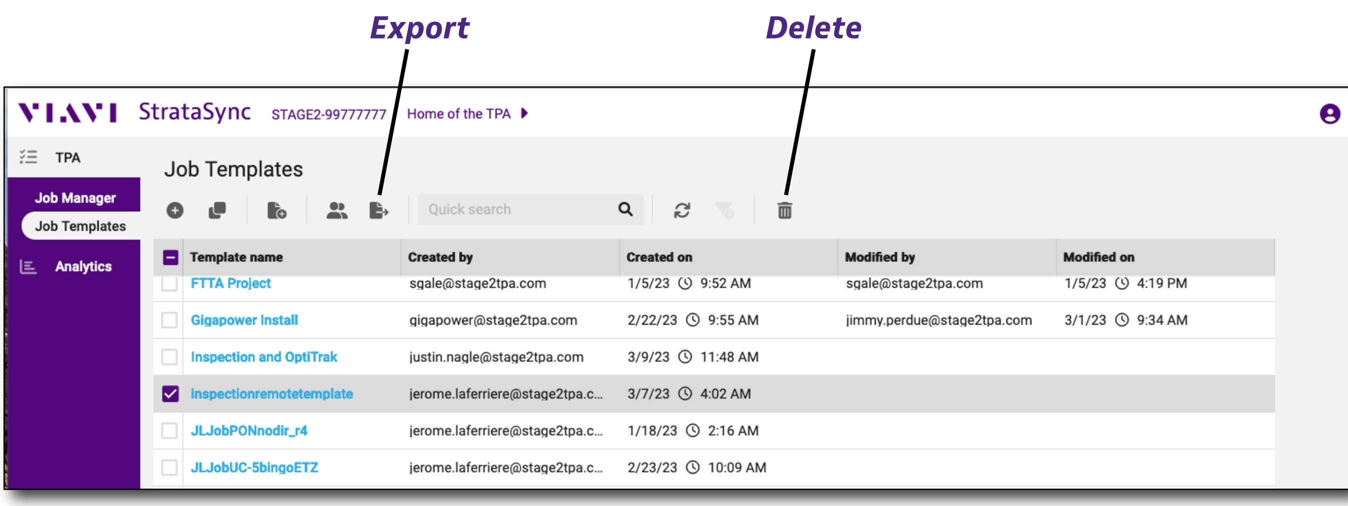
# Exporting a job template

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.

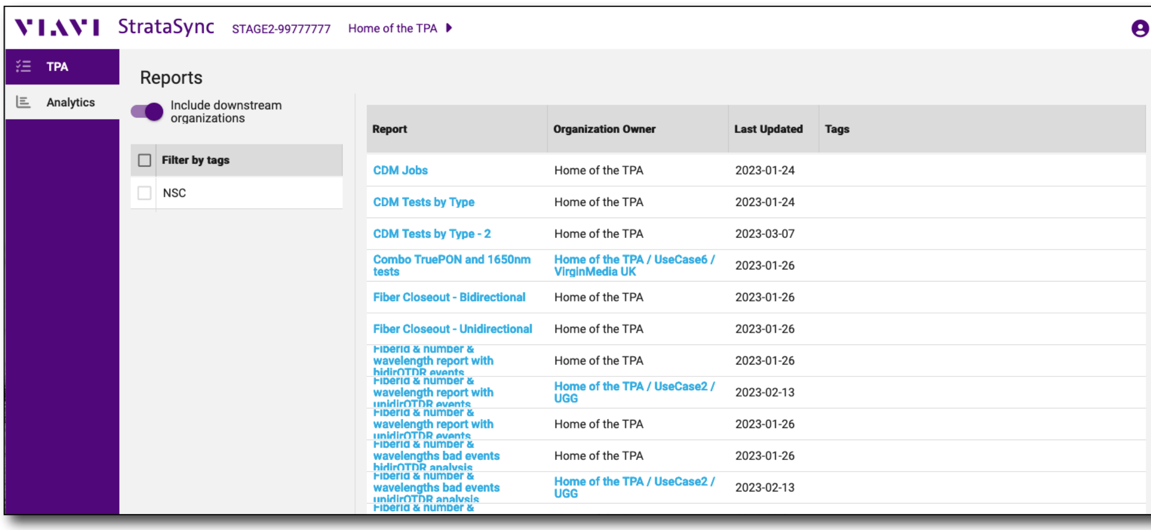
See *"Report settings" on page 228 (per-org settings) or page 295 (system-wide).*

# Analytics Dashboard

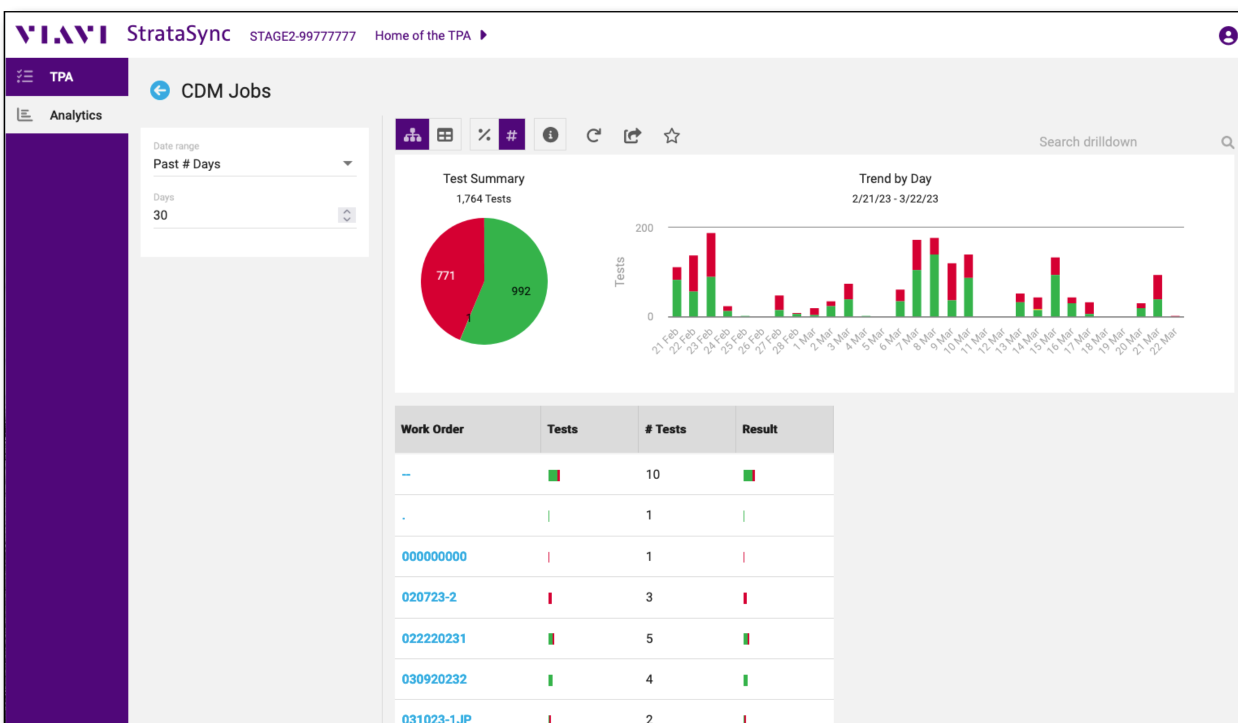
The **Analytics Dashboard** supports work order-associated CDM (Common Data Model) JSON-formatted test results from any VIAVI test instrument.

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 individial dashboard.

This dashboard is covered in detail in the Analytics chapter. See *Analytics Dashboard on page 58.*




**Analytics Reports List**




**Analytics Dashboard**

6

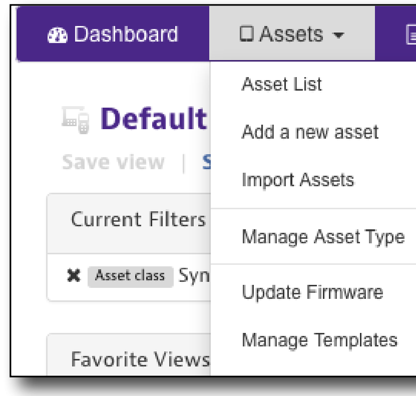
# Assets

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

# Assets

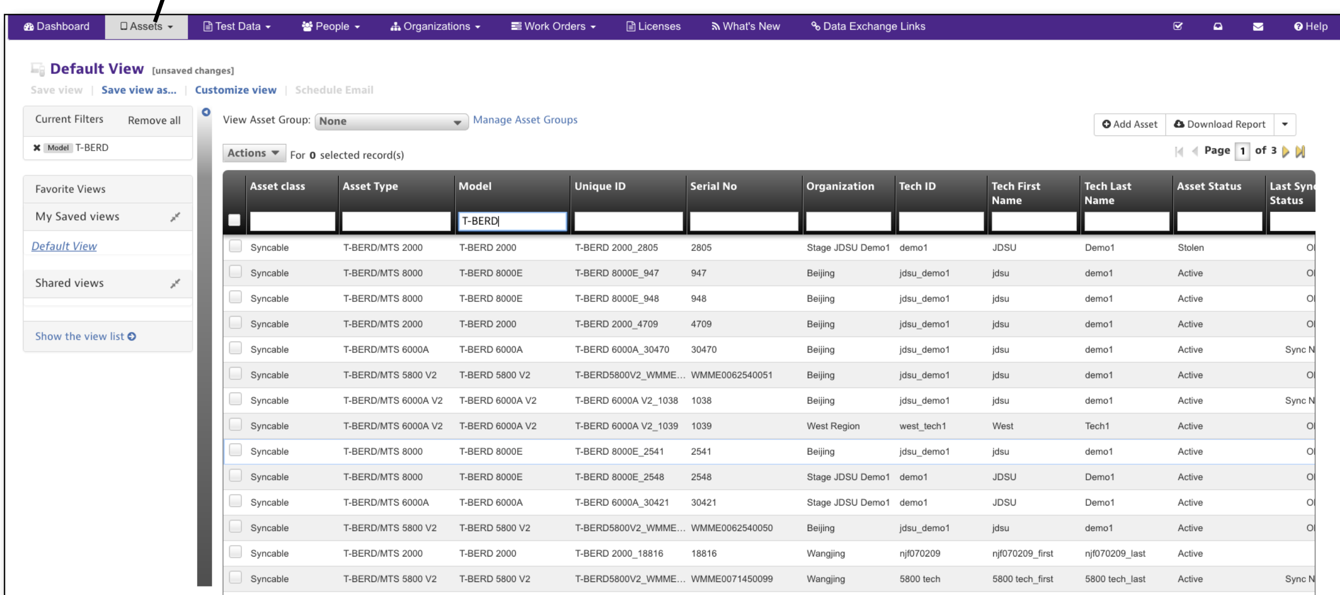
The **Assets** tab is the hub for all of the asset management features of your StrataSync account, including: adding new assets, importing and editing asset details, updating firmware, managing configuration templates, and deploying software options to your instruments, etc.

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




**Assets dropdown menu**

***Assets tab***




**Asset List selected from the Assets tab**

# Searching and sorting

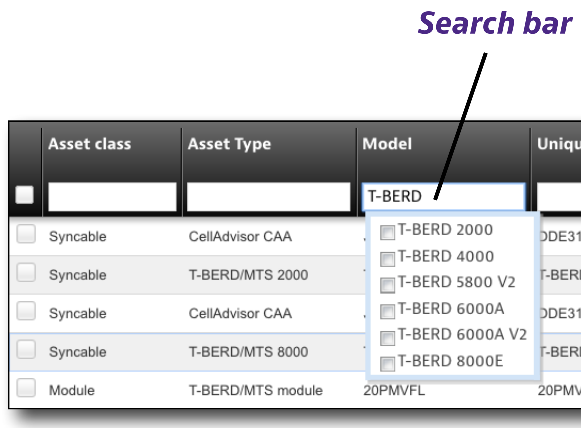
From the Assets List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

## Searching

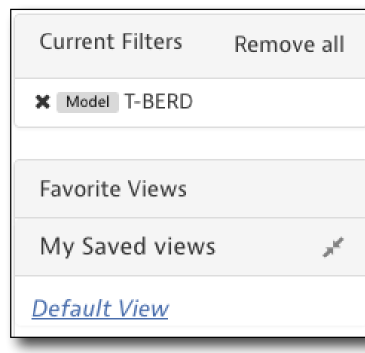
You can search by typing into the search bar under a column header. The list updates with the results.

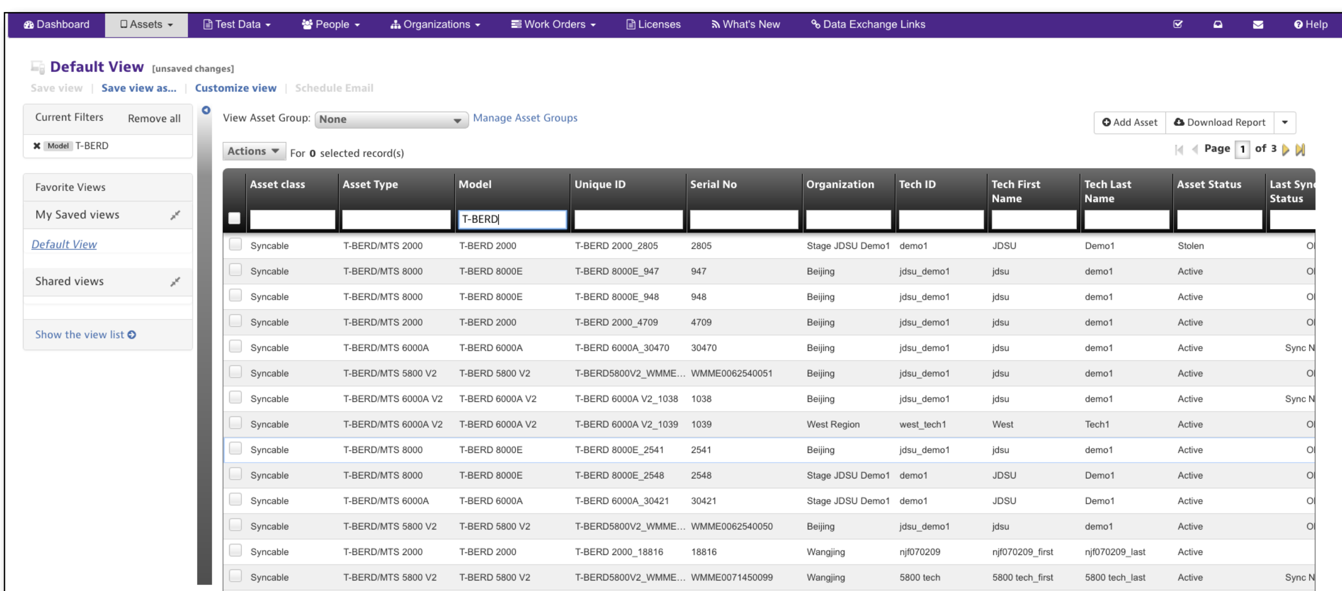
Make sure to include hyphens for product names, etc., (e.g. T-BERD 2000).

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




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



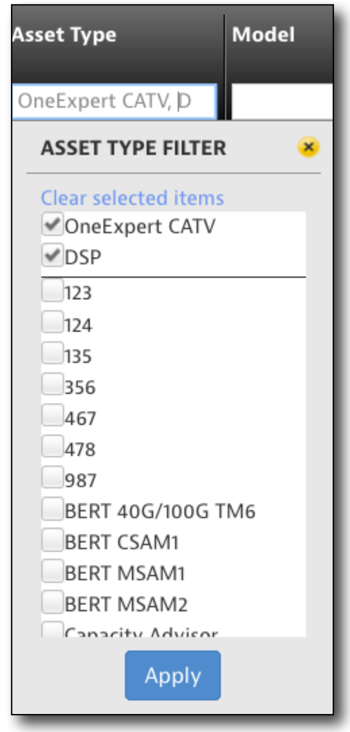




**Scroll to the right to reveal more detail, including Software Options and Test Data.**

### *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.



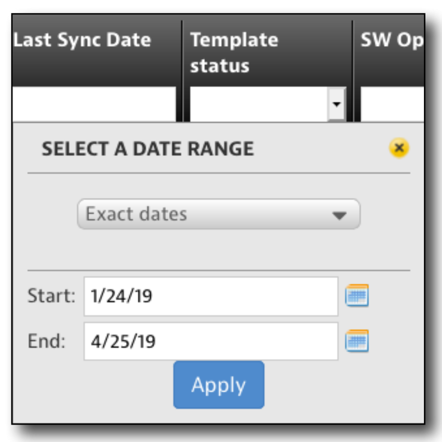

> ***NOTE:***
>
> ***Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.***

### *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.

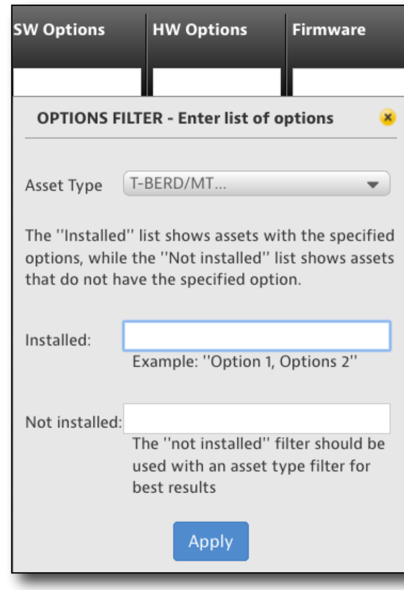


### *Option filters*

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.

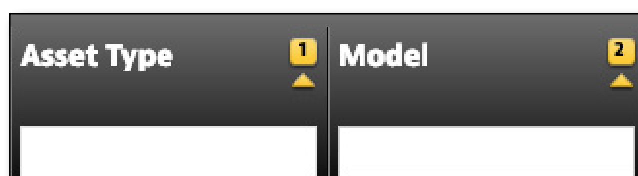



***NOTE:***

***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.



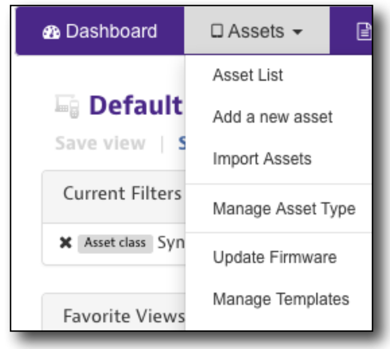

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

# Views

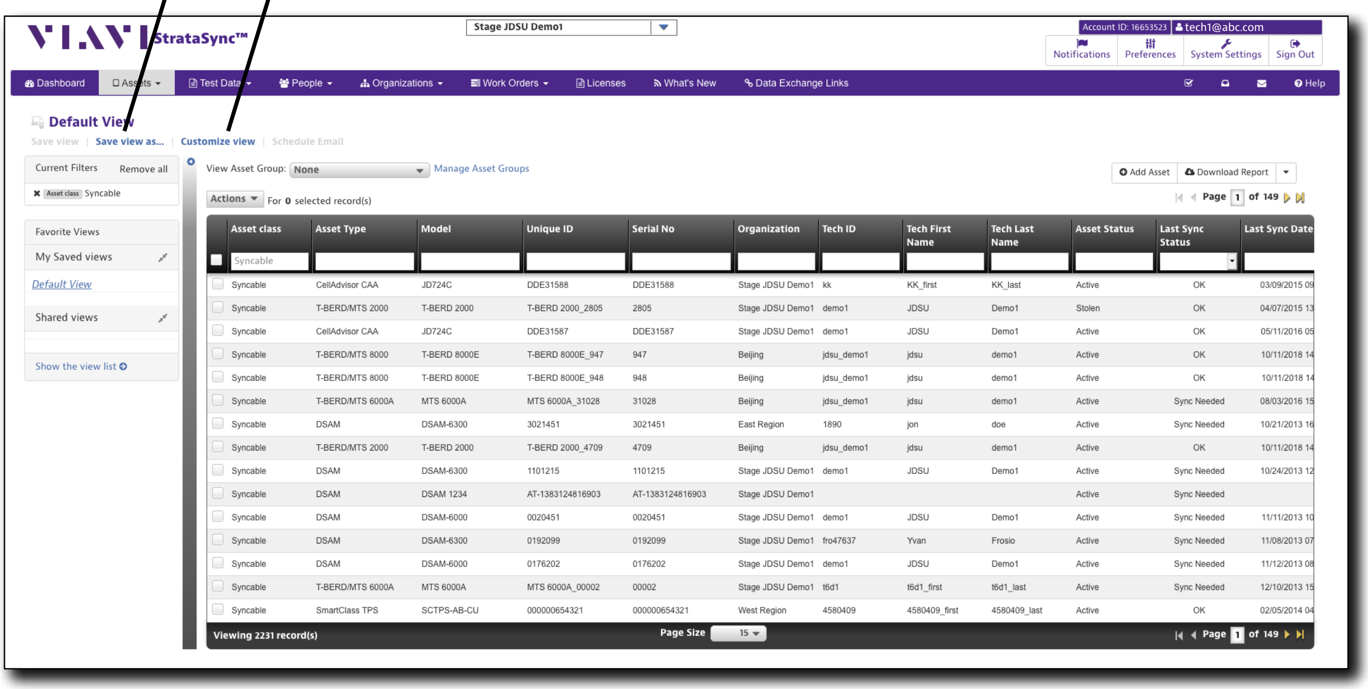
## Customizing views

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.

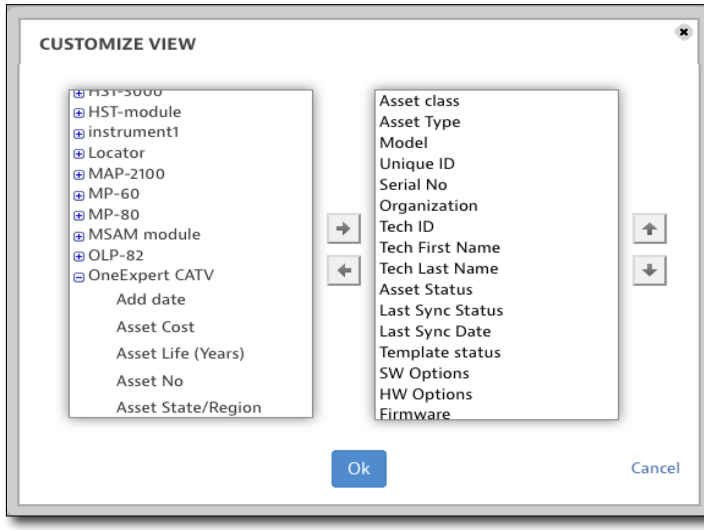



***Save view as***    ***Customize view***



**Assets List Default View**

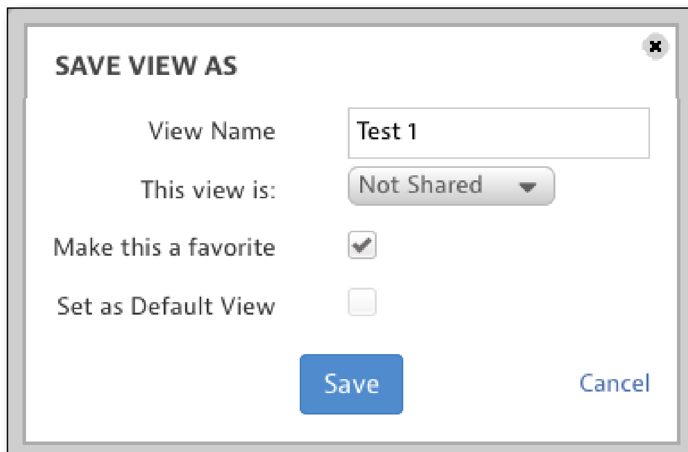
3. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
4. Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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




## Saving views

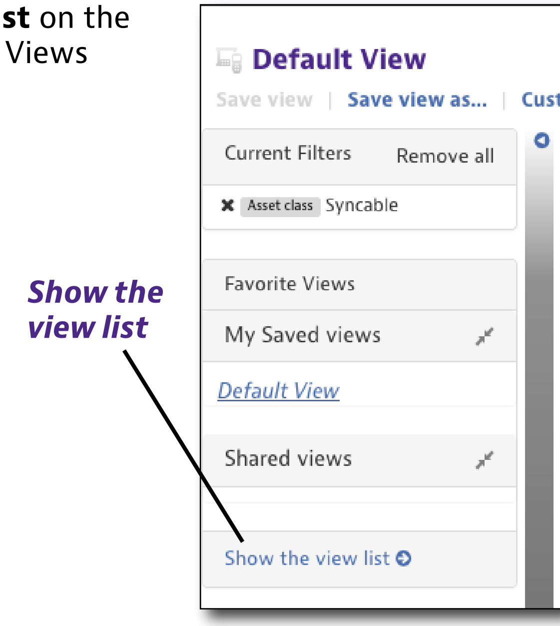
1. From the Assets List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
2. Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
3. When done, click **Save**.

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

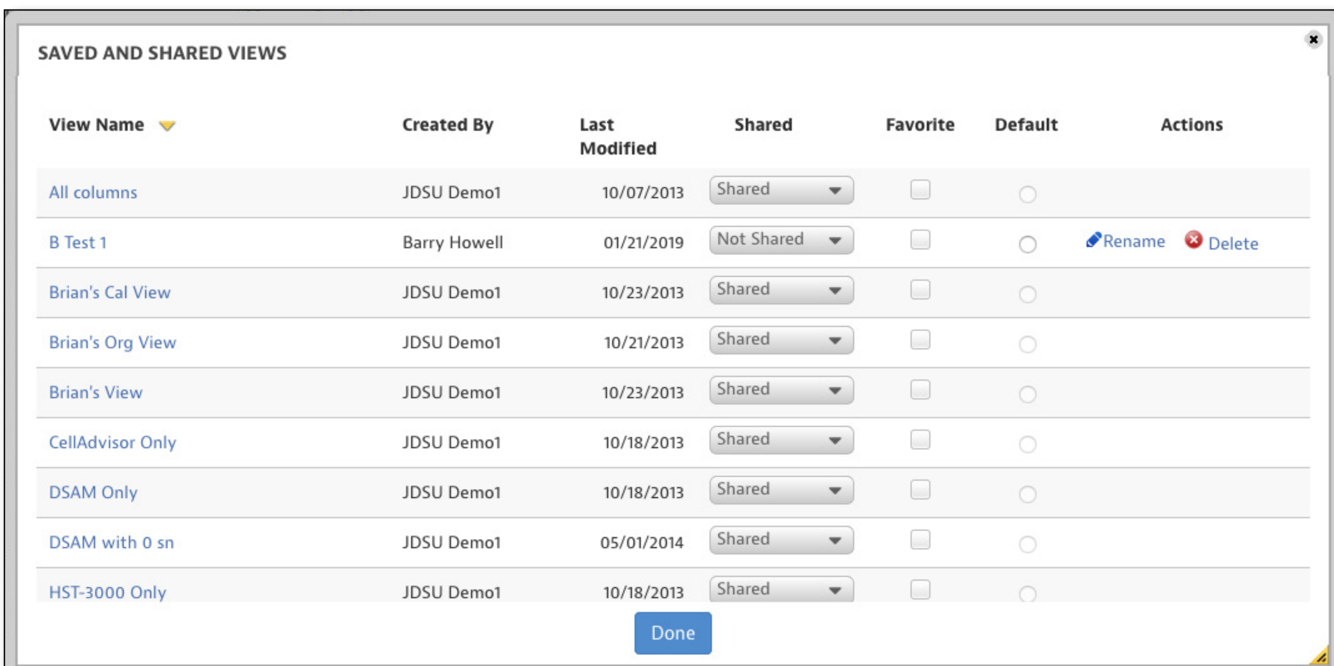


## Sharing and editing views

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




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




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

# Asset List

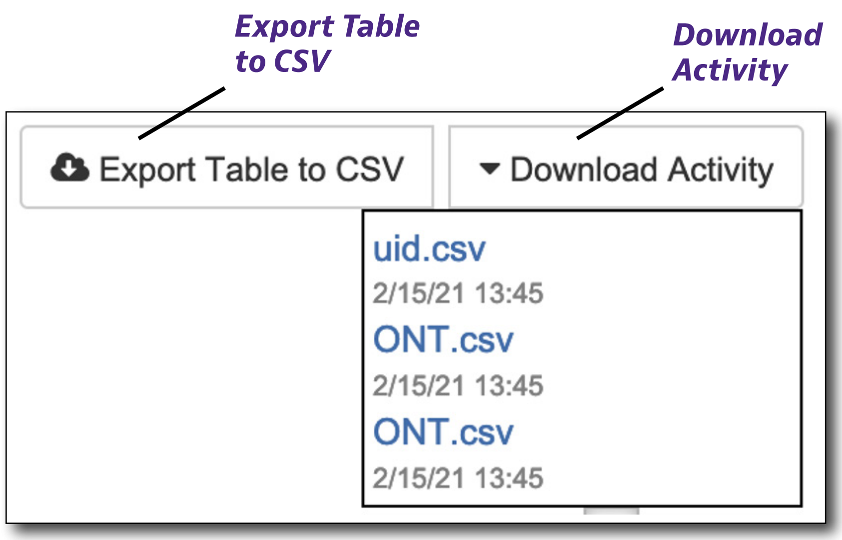
## Exporting lists to CSV

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

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

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

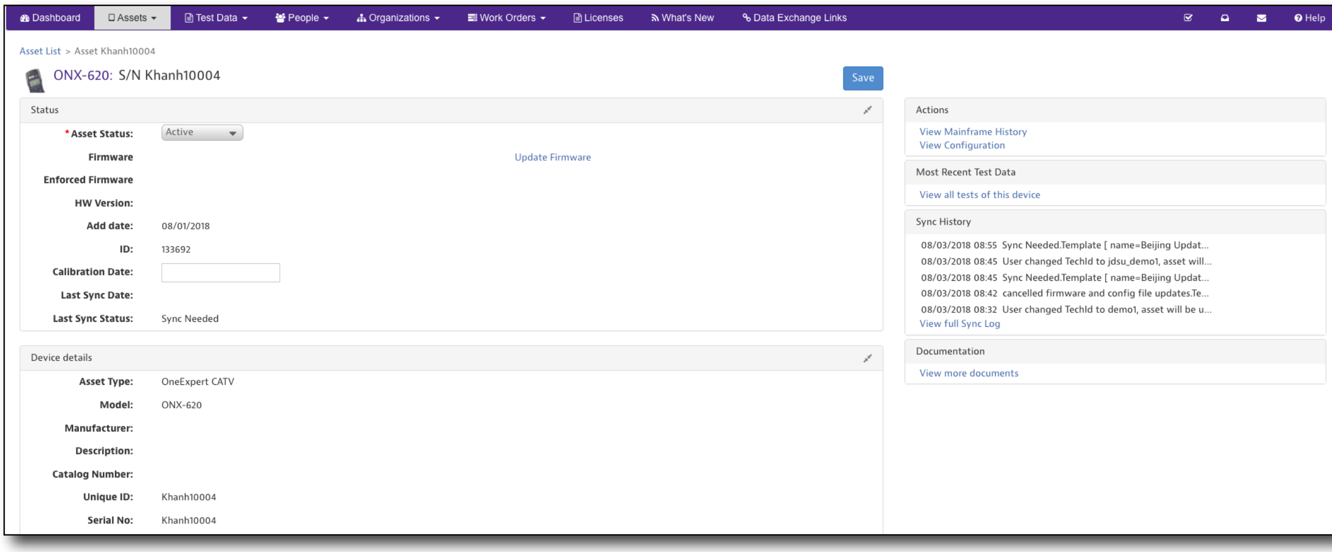
Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.




*Exporting data to CSV*

# Editing asset details

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




***NOTE:***

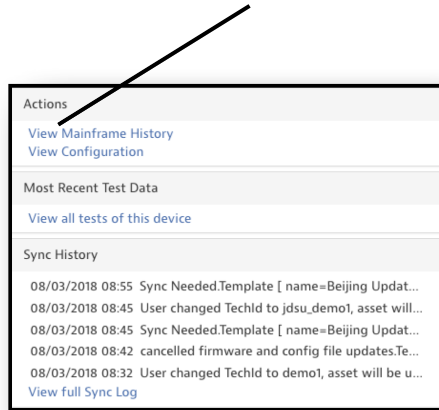
***You don't have to manually add syncable assets. Just sync them to automatically add them and all details to your Asset List.***

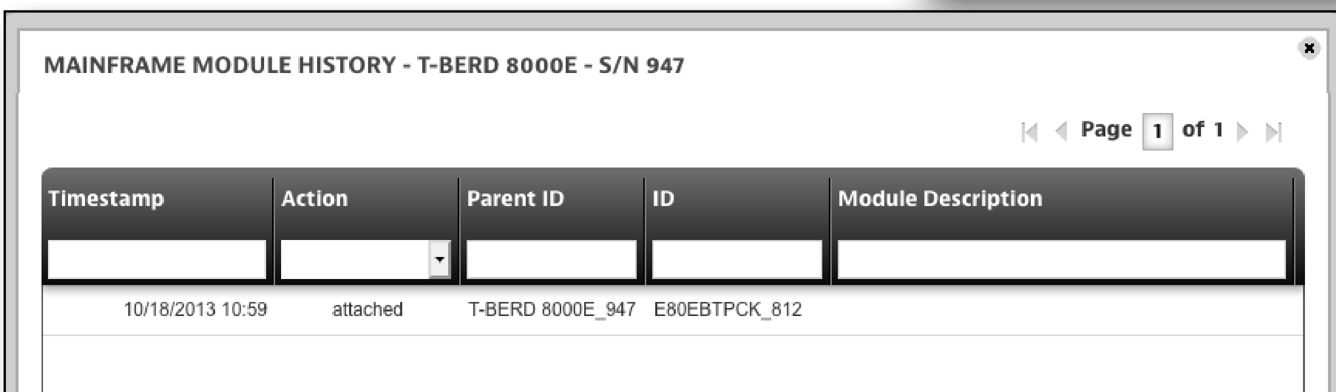
### *View mainframe history*

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

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

***View Mainframe History***



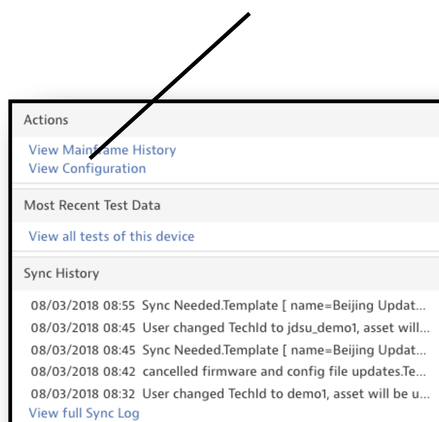




### *View configuration*

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.

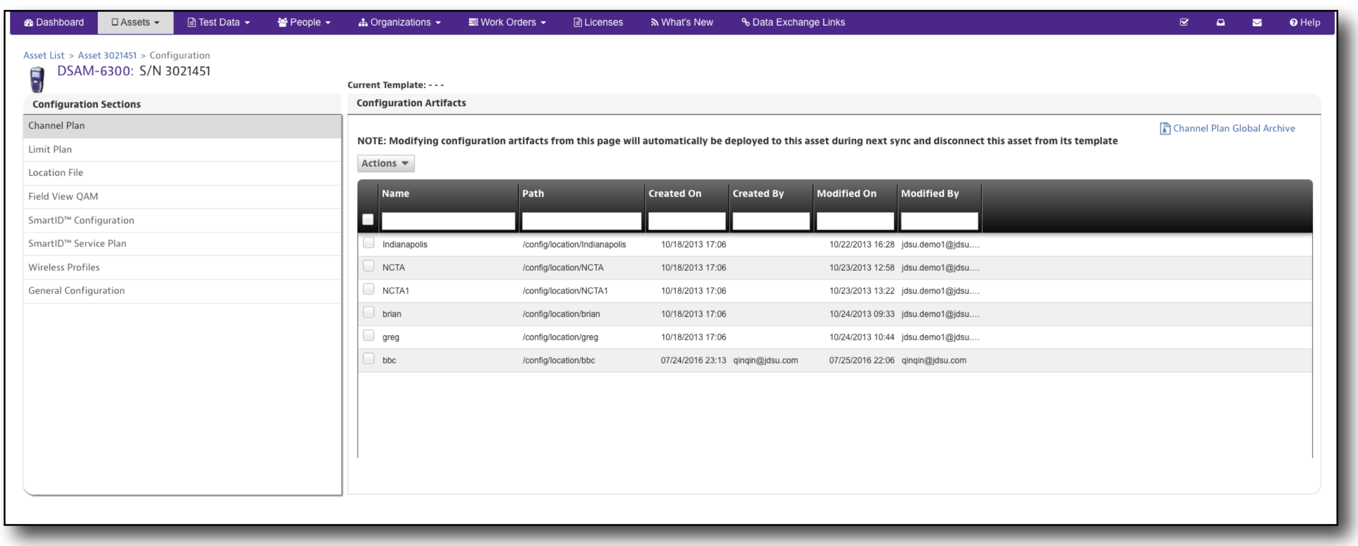
***View Configuration***



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***



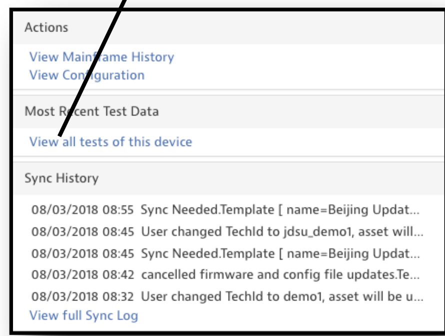

> ***NOTE:***
>
> ***For Edit, Rename, and Delete, changes will be applied to the instrument on the next sync. This also removes this instrument from its template.***

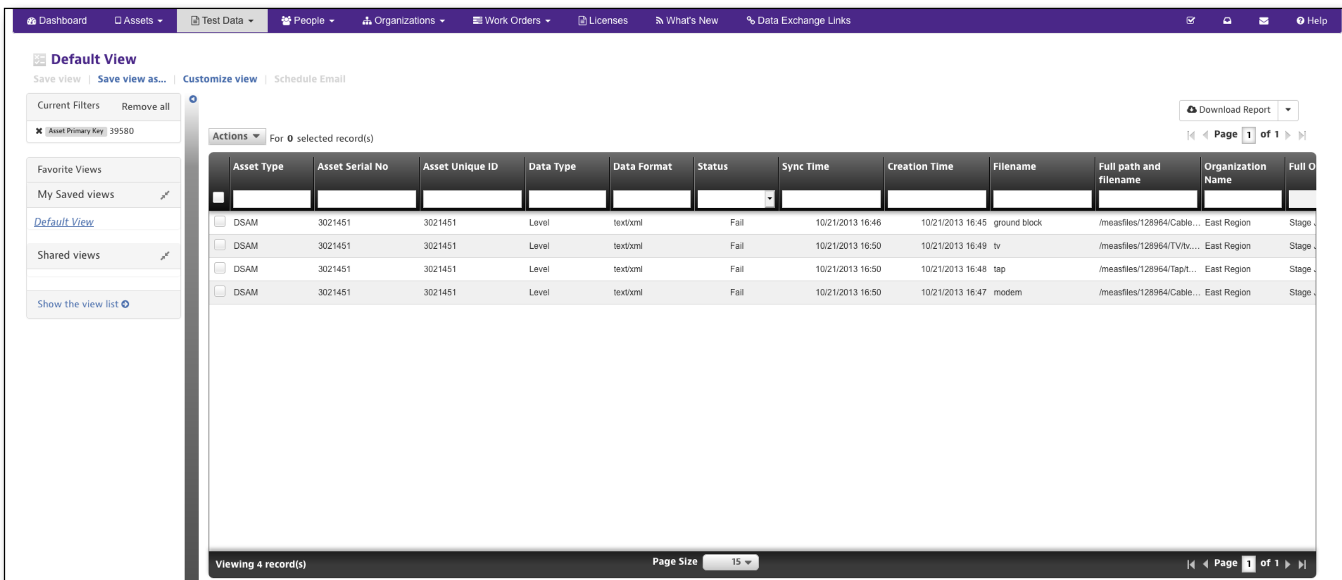
### *View test data*

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***



### *View sync log*

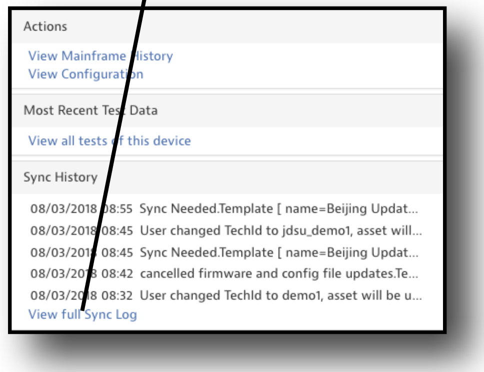
From the Asset Details screen, you can view the configuration sync history of the device.

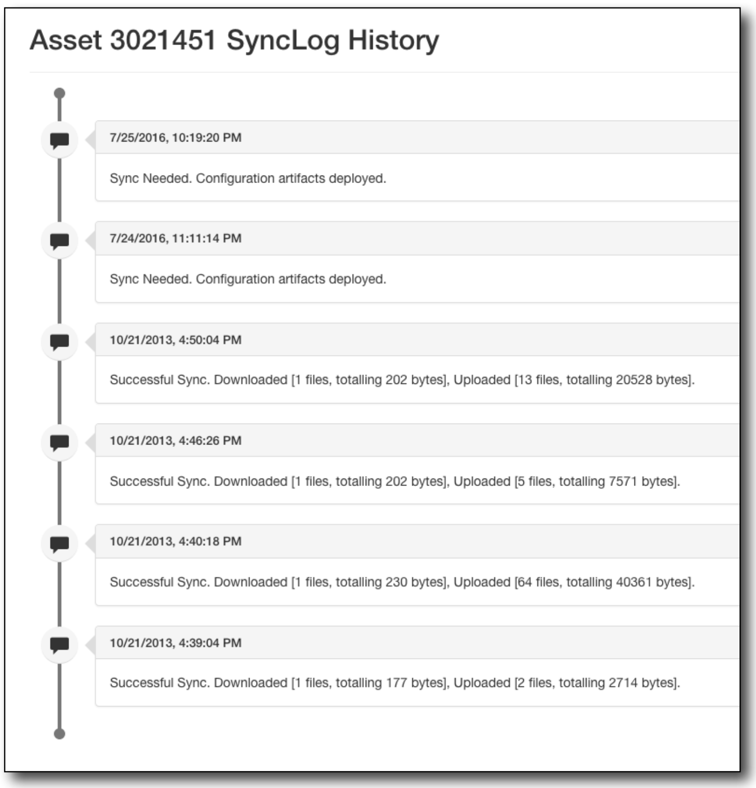
The sync log shows all the data transfers with a device, including sync timing or if a sync is needed to deploy configuration artifacts, test data, and when firmware has been updated, etc.

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***



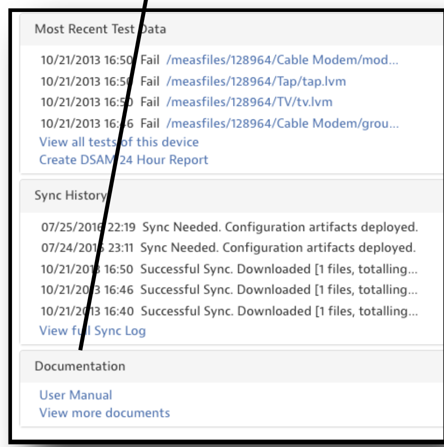



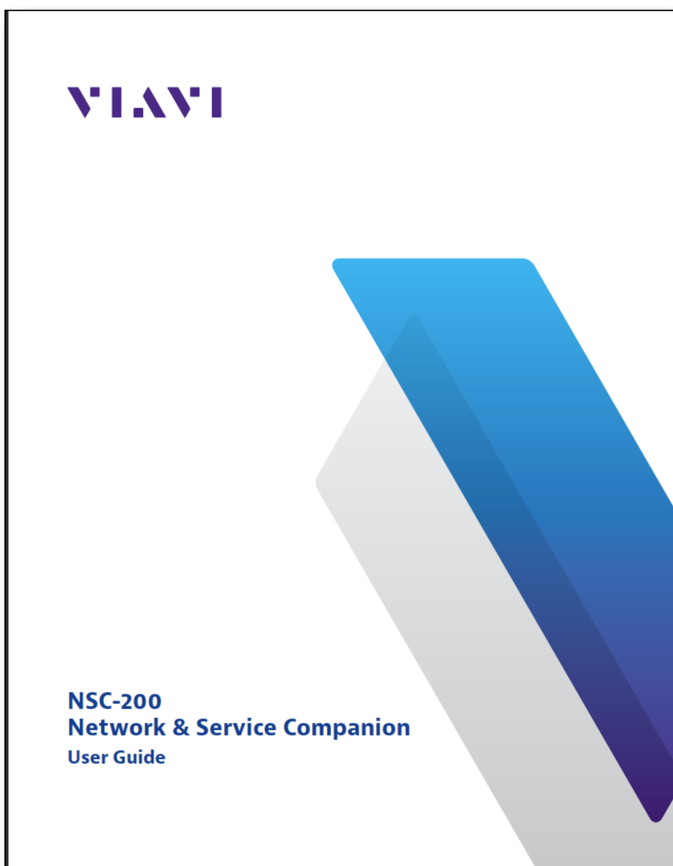
### *View documentation*

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***



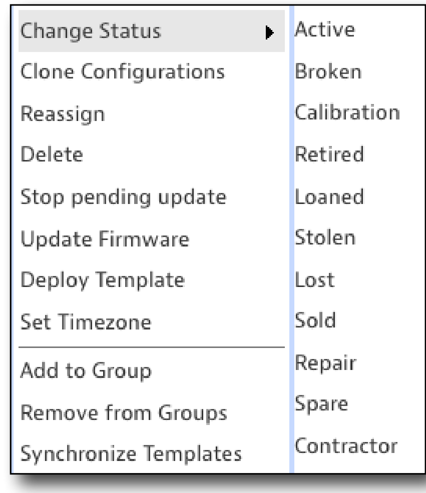



## Changing asset status

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***.

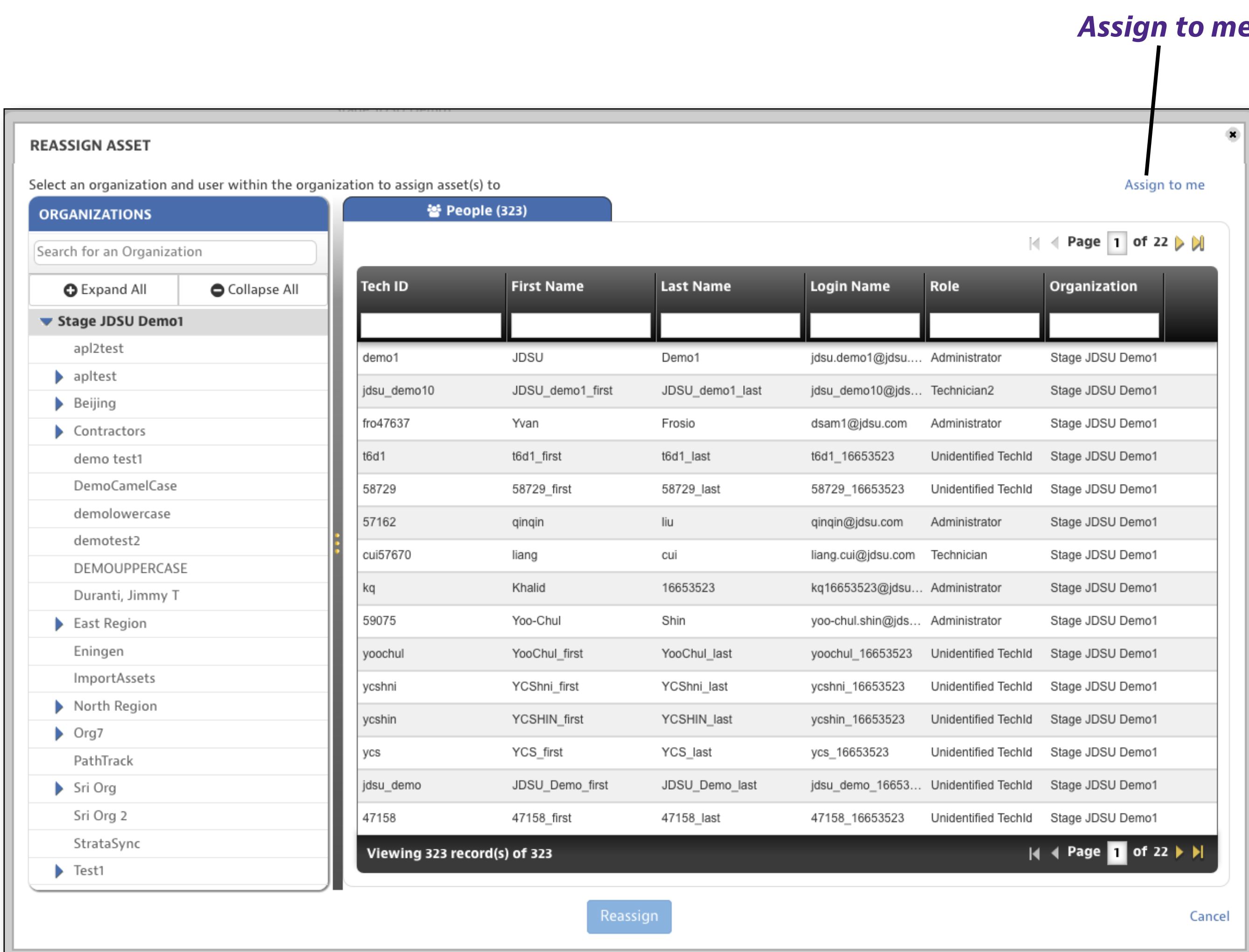
   Assets with the following status will not sync to StrataSync: ***Retired, Stolen, Lost*** and ***Sold***.



## Reassigning an asset

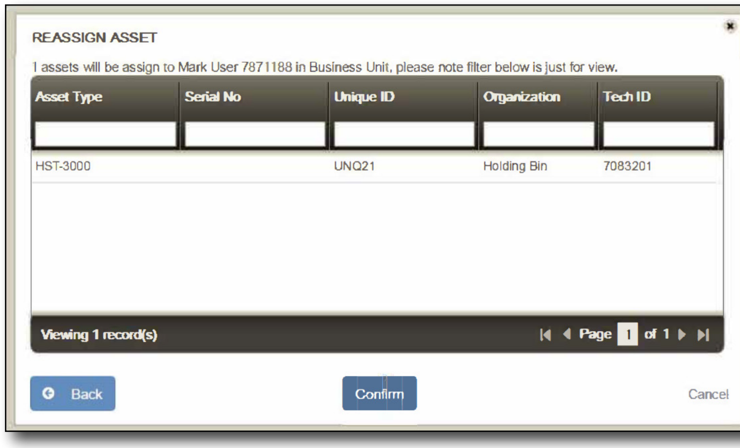
Reassigning assets from the Assets List is similar to how you assign assets from the Holding Bin.

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.



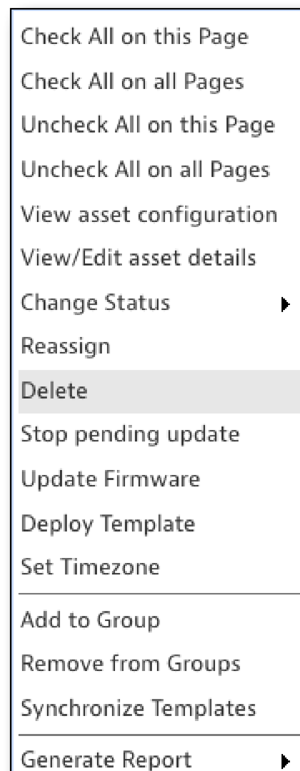

> ***NOTE:***
>
> ***You can also assign the asset to yourself by selecting Assign to me at the top right corner.***

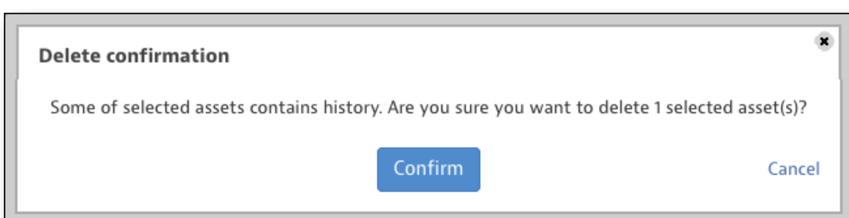
4. When done, click **Confirm**.



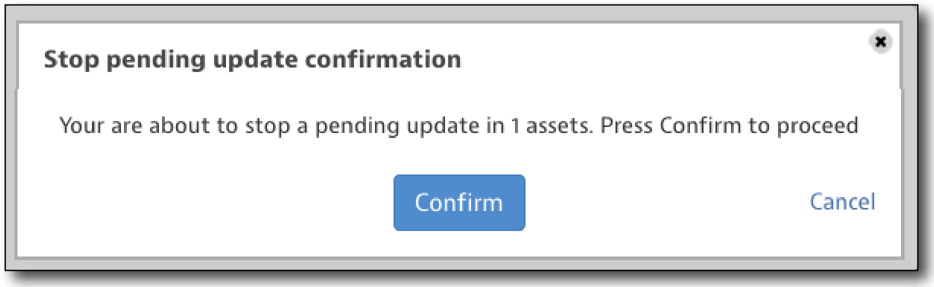

## Deleting an asset

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



## Stop pending update




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

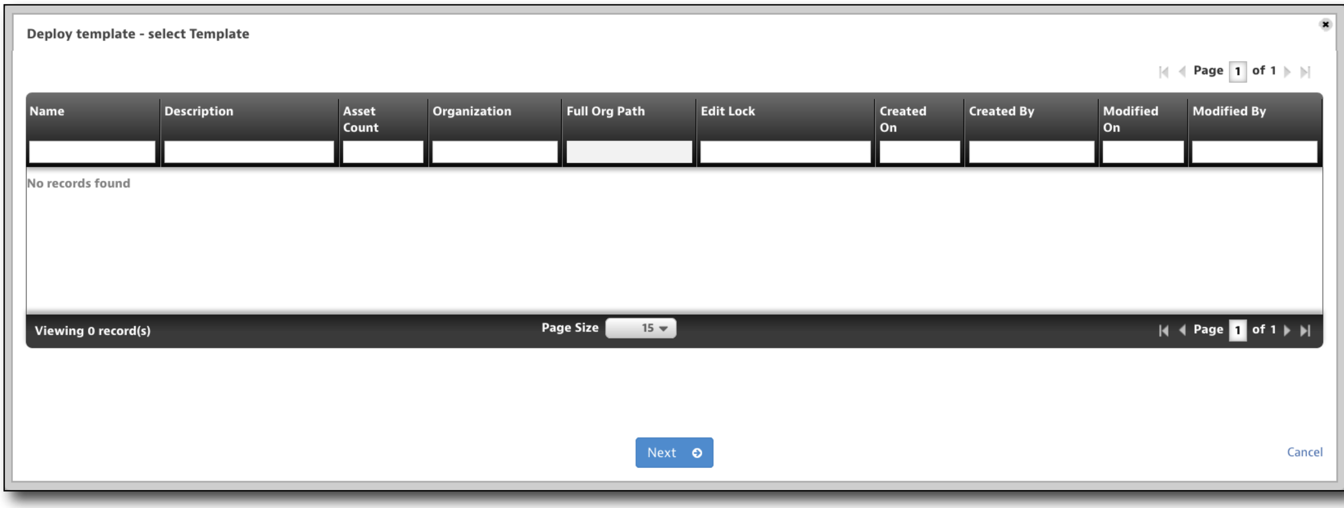
## Update firmware

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

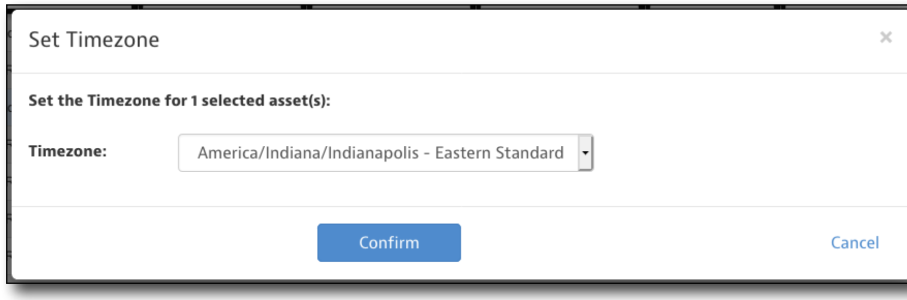
1. From the Assets List, select the checkbox next to the asset (or assets) you want to update.
2. Right-click the item (or use the **Action** dropdown) and select ***Update Firmware***.
3. A confirmation screen asks you to confirm. Click **Confirm.**

## Deploying a configuration template

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

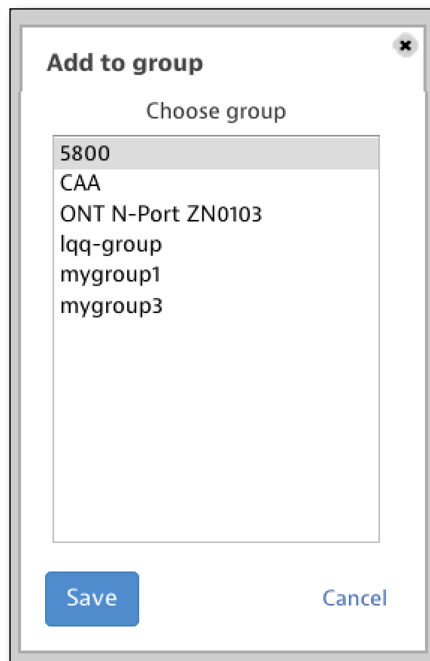


## Set timezone




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

## Add to group

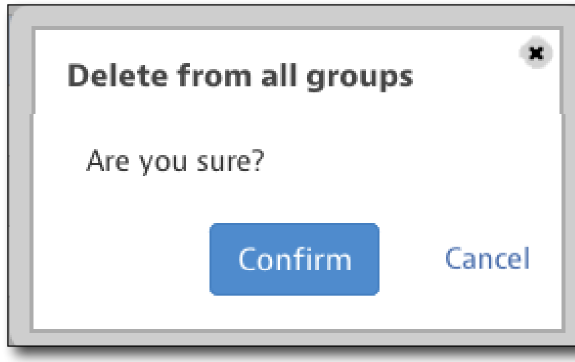



Asset groups provide a way to organize your assets for easy management and deployment.

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

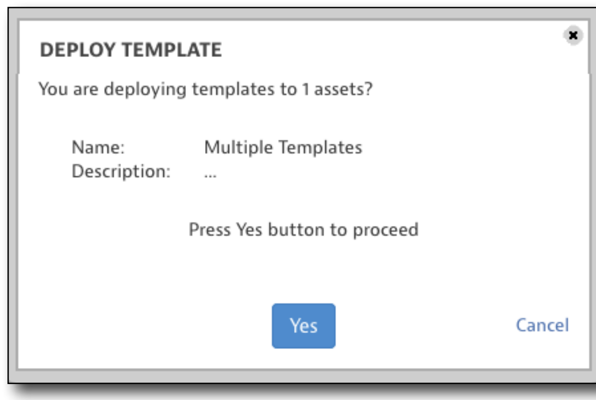
## Remove from groups

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




## Synchronize configuration templates

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



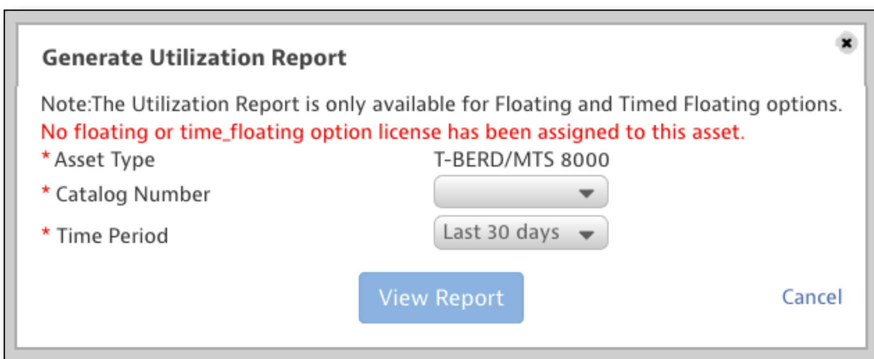
## Generate reports

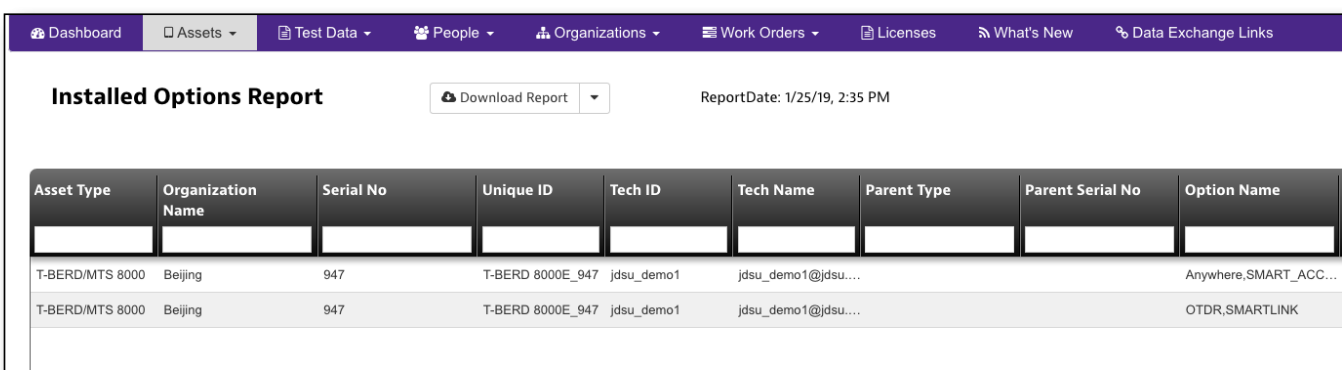
1. From the Assets List, select the checkbox next to the asset (or assets) you want to create a report for (applicable instruments only).
2. Right-click the item (or use the **Action** dropdown) and select ***Generate Report***, then choose ***Utilization*** or ***Installed Options***.

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

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

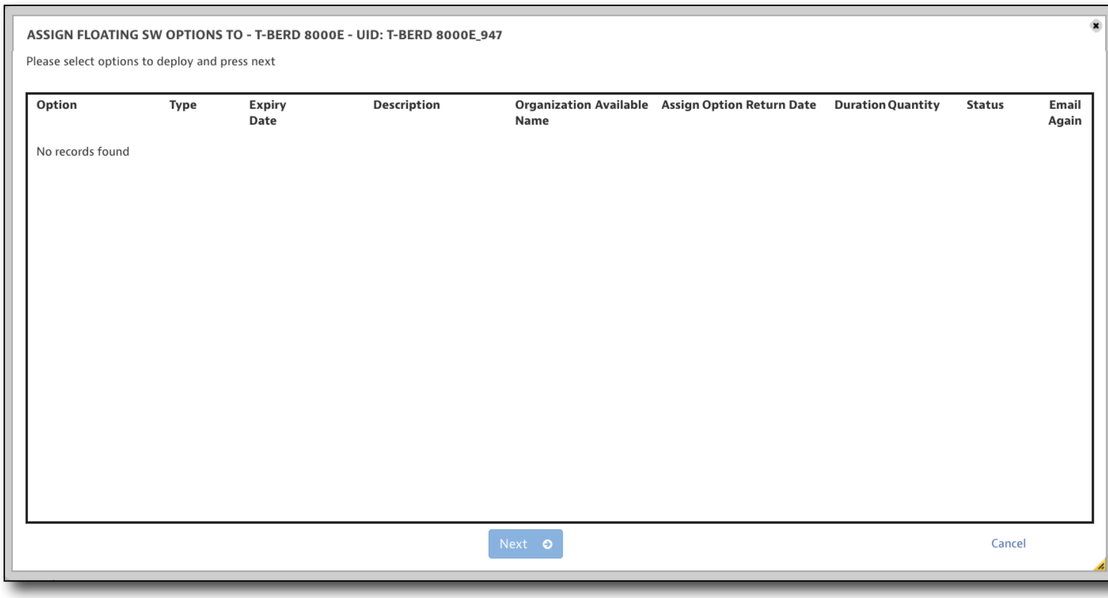
> ***NOTE:***
>
> ***The Reporting features are only available if you purchased the option.***



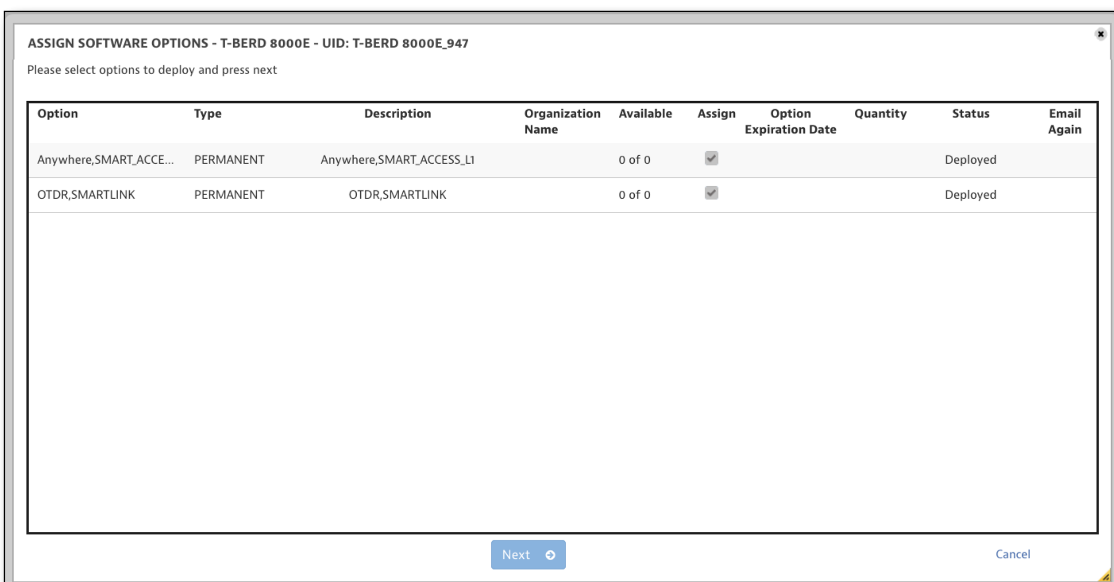



# Options

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.



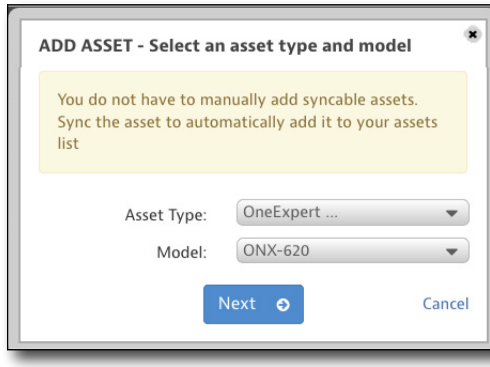

**Floating Options list**




**Software Options list**

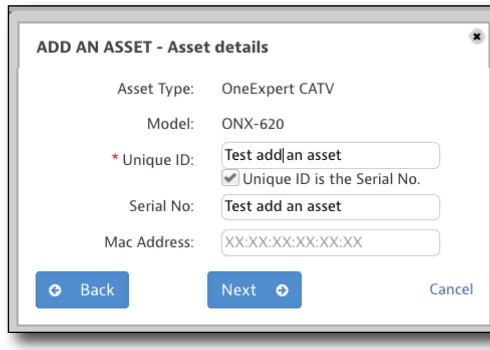
# Adding new assets

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

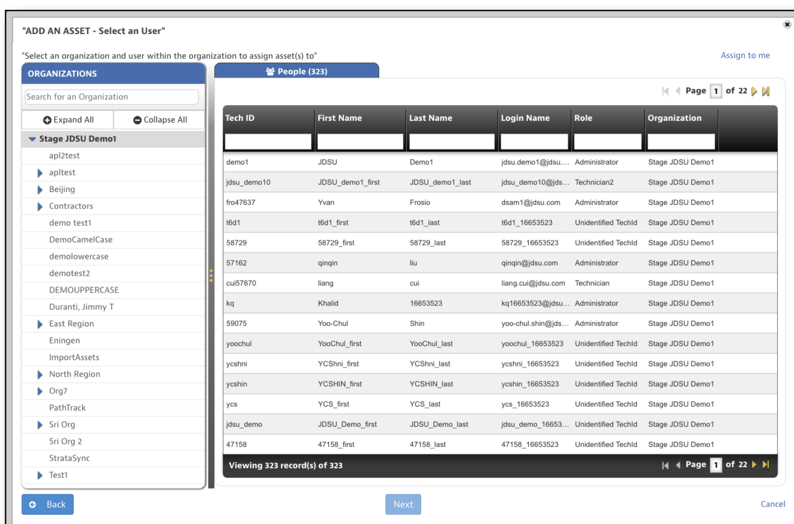



1. Select the **Assets** tab, and then select ***Add a New Asset.*** The Add Asset screen appears.

   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.



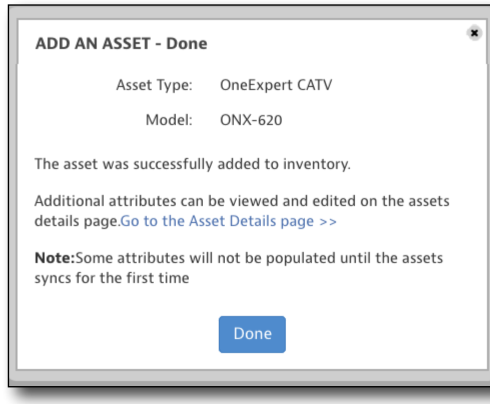

2. Select the asset type and model, then click **Next**. The Asset Details screen appears.




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

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

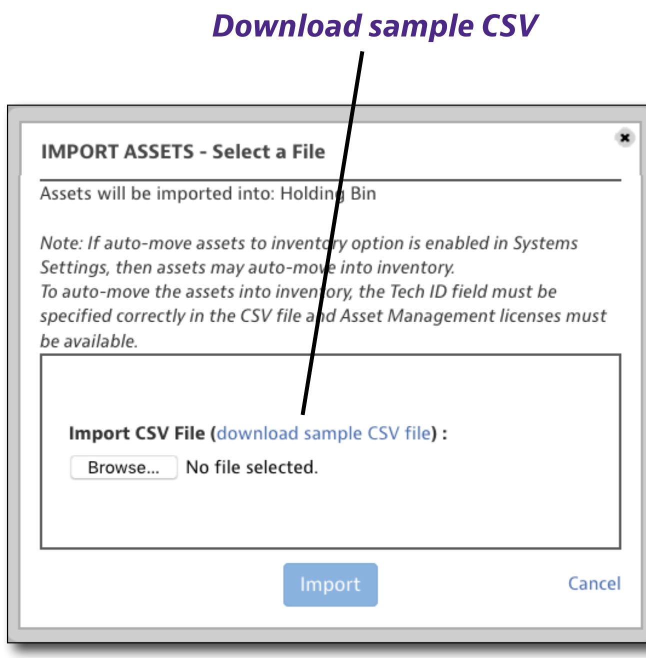
   You can make further edits to the asset by selecting **Asset Details**.




# 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.

> ***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.

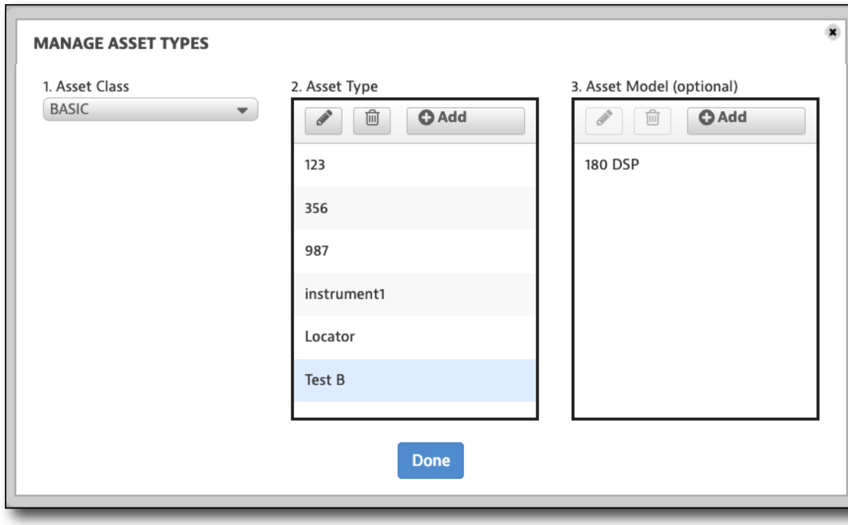
| Asset Type | Model | Unique ID |
|---|---|---|
| **CellAdvisor 5G** | CA5000 | CA5000_{Serial Number} |
| **CX300** | CX300 | CX300_{Serial Number} |
| **FiberChek** | FiberChek | FiberChek_{Serial Number} |
| **MAP-2100** | MAP-2100 | MAP-2100_{Serial Number} |
| **ONA-800** | ONA-800 | ONA-800_{Serial 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.

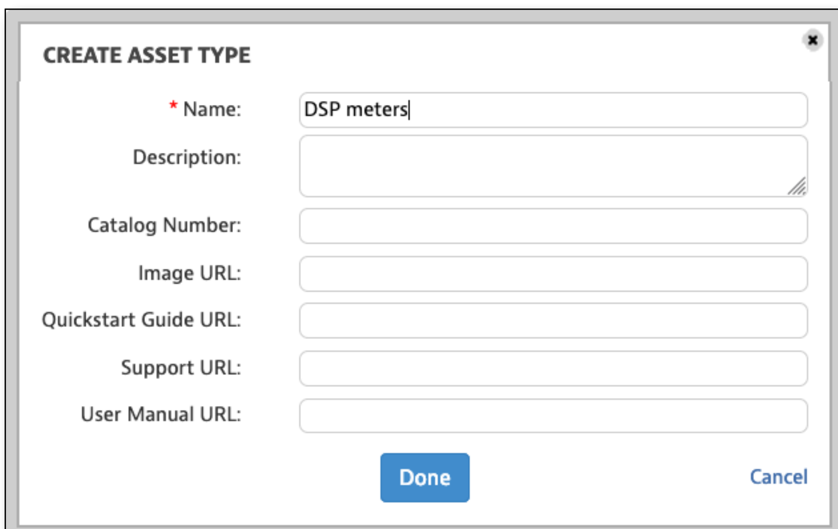



Select the **Assets** tab, and then select ***Manage Asset Type.*** The Manage Asset Types screen appears.

## 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

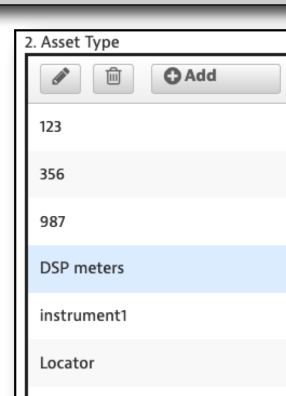



### *Adding asset types*

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**.

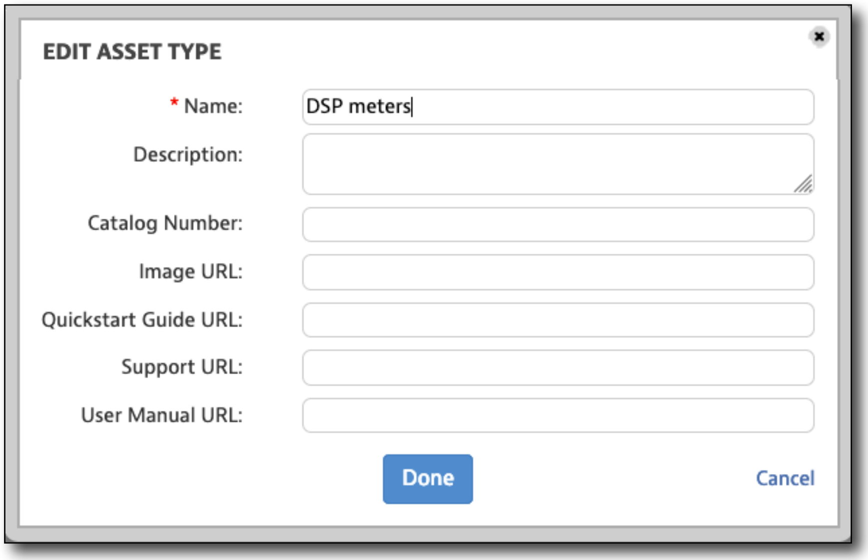
The new asset type will appear in the list, as shown here.



### *Editing asset types*

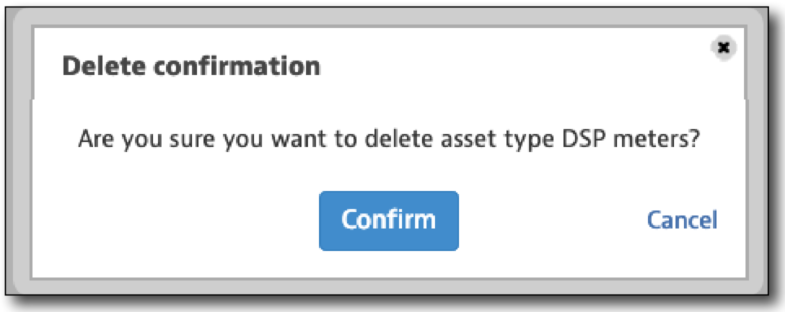
Select the asset you want to edit, then select the edit button at the top of the **Asset Type** column.

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




### *Deleting asset types*

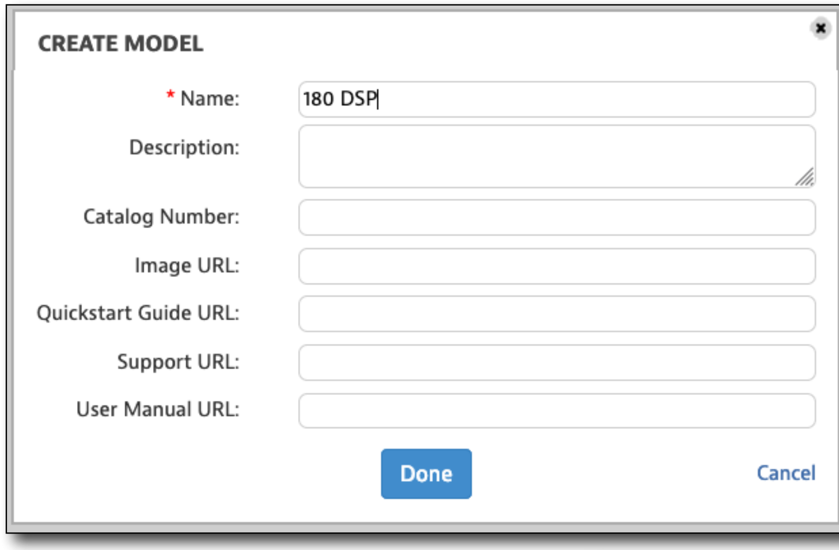
Select the asset you want to delete, then select the delete button at the top of the **Asset Type** column. A confirmation screen asks you to confirm. Click **Confirm**.



# Asset models

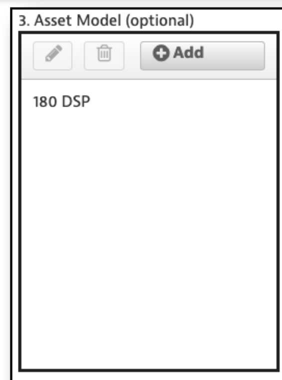
### *Adding asset models*

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**.

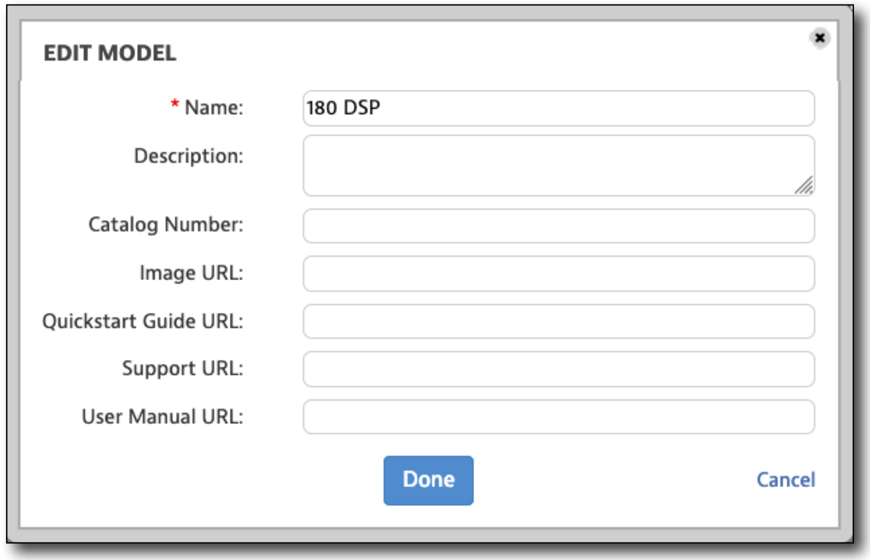
The new asset model will appear in the list, as shown here.



### *Editing asset models*

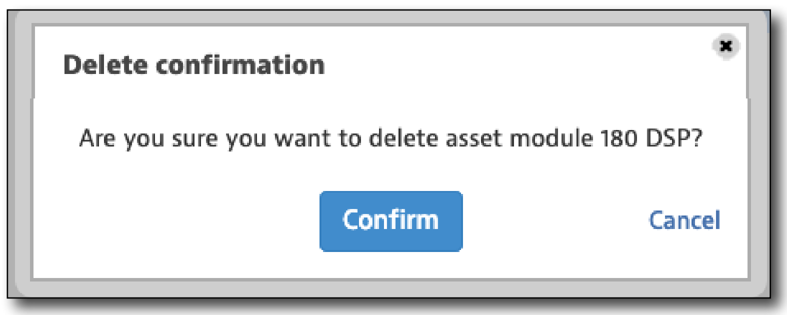
Select the model you want to edit, then select the edit button at the top of the **Asset Model** column.

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




### *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**.



# 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.

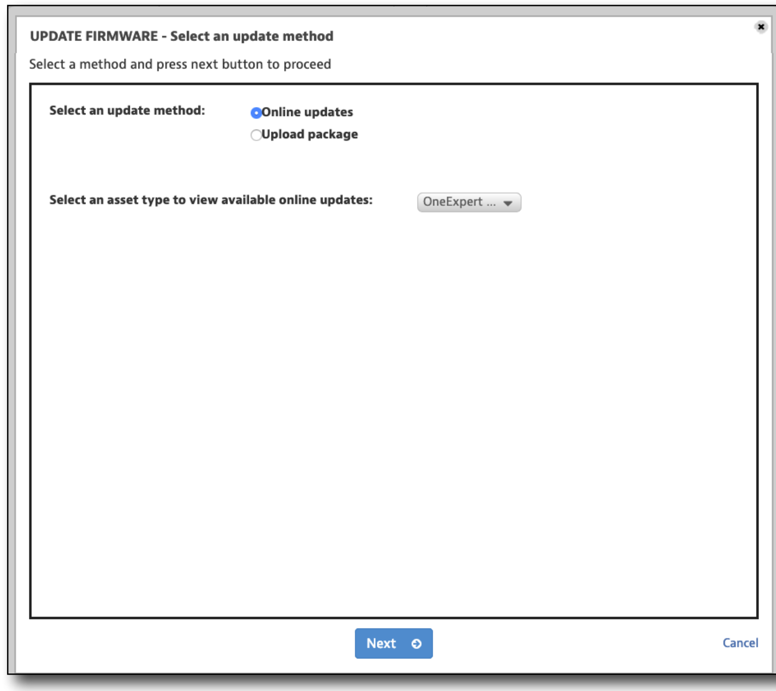
Select the **Assets** tab, and then select ***Update Firmware.*** The Update Firmware screen appears.

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.

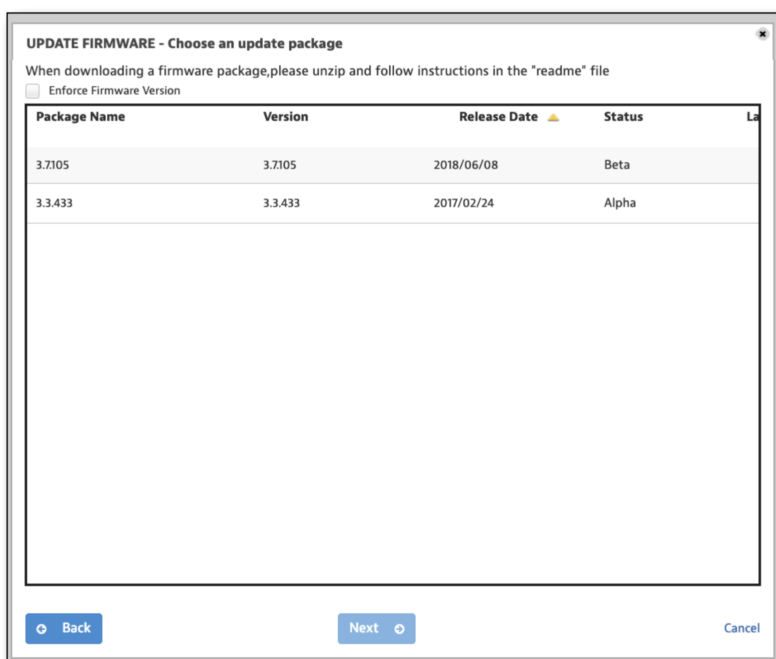



3. Select a package you want to download.

   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.

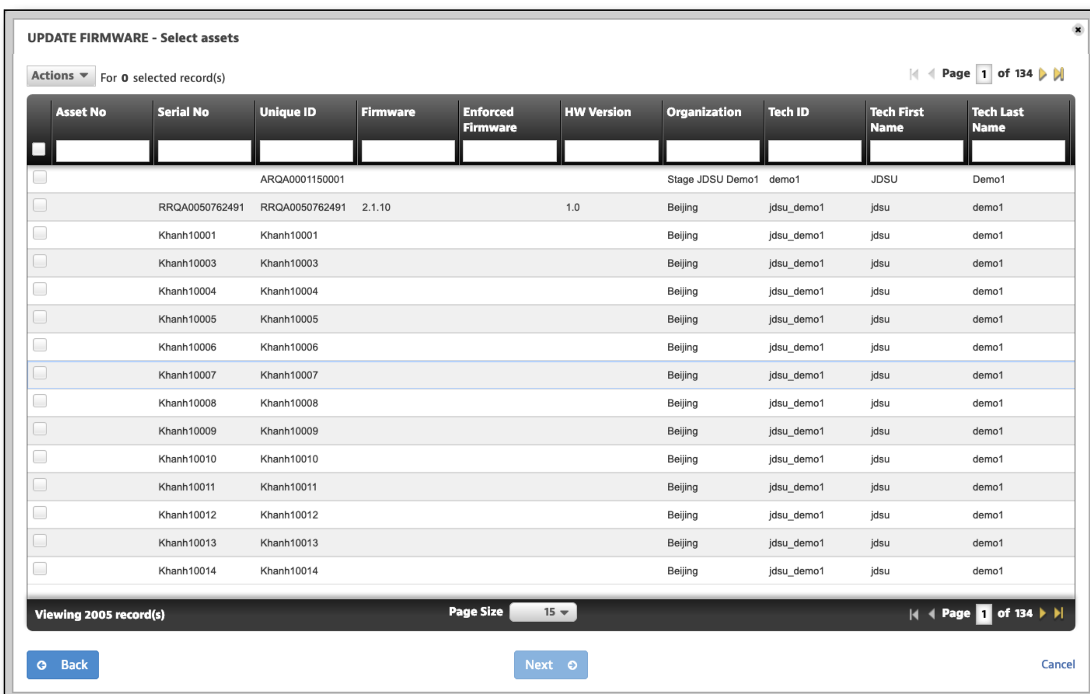
After StrataSync confirms the firmware update is completed, StrataSync takes no further action.

- 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.

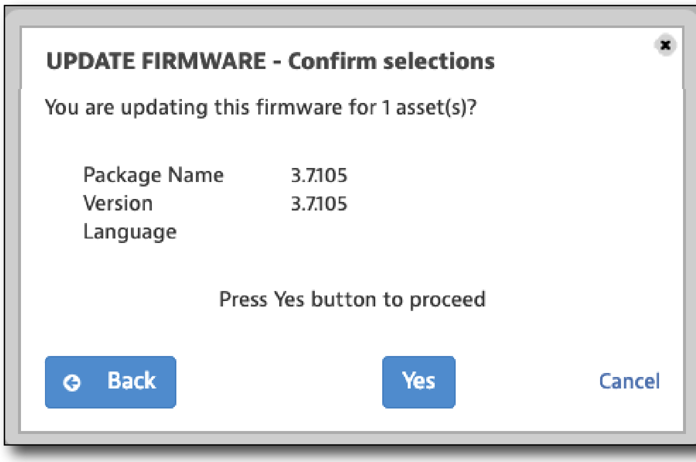
  StrataSync will continue to monitor the firmware version the unit is running unless **Revoke Enforced Firmware** is selected (in Asset View) or a new firmware version is deployed to the unit.

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.




| Asset No | Serial No | Unique ID | Firmware | Enforced Firmware | HW Version | Organization | Tech ID | Tech First Name | Tech Last Name |
|---|---|---|---|---|---|---|---|---|---|
| | | ARQA0001150001 | | | | Stage JDSU Demo1 | demo1 | JDSU | Demo1 |
| | RRQA0050762491 | RRQA0050762491 | 2.1.10 | | 1.0 | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10001 | Khanh10001 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10003 | Khanh10003 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10004 | Khanh10004 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10005 | Khanh10005 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10006 | Khanh10006 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10007 | Khanh10007 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10008 | Khanh10008 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10009 | Khanh10009 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10010 | Khanh10010 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10011 | Khanh10011 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10012 | Khanh10012 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10013 | Khanh10013 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |
| | Khanh10014 | Khanh10014 | | | | Beijing | jdsu_demo1 | jdsu | demo1 |

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

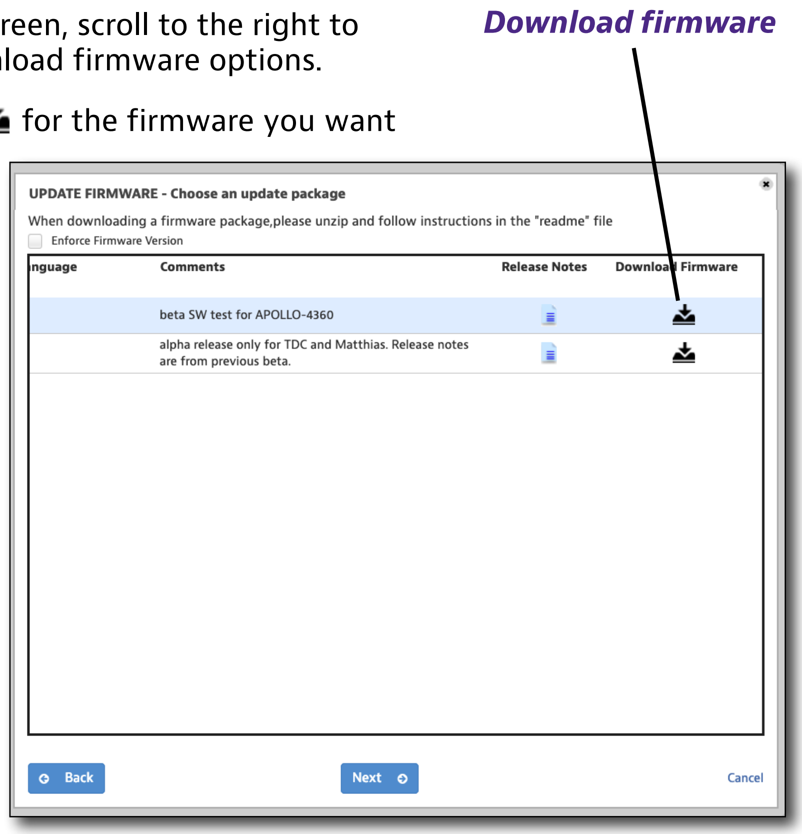


### *Downloading to a USB flash drive*

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.

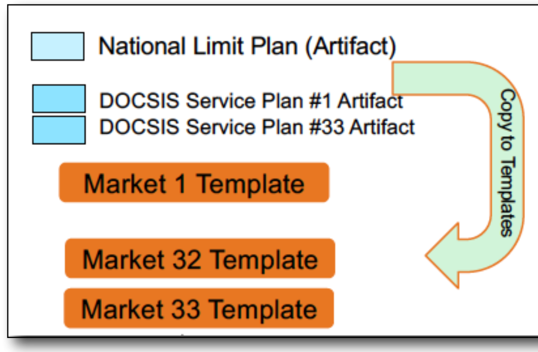
   Remember when downloading firmware packages to unzip the file and follow instructions in the Read Me file.
3. Follow the instructions to save the firmware to your USB flash drive.
4. Then follow the instrument's firmware installation instructions to update.



# 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.



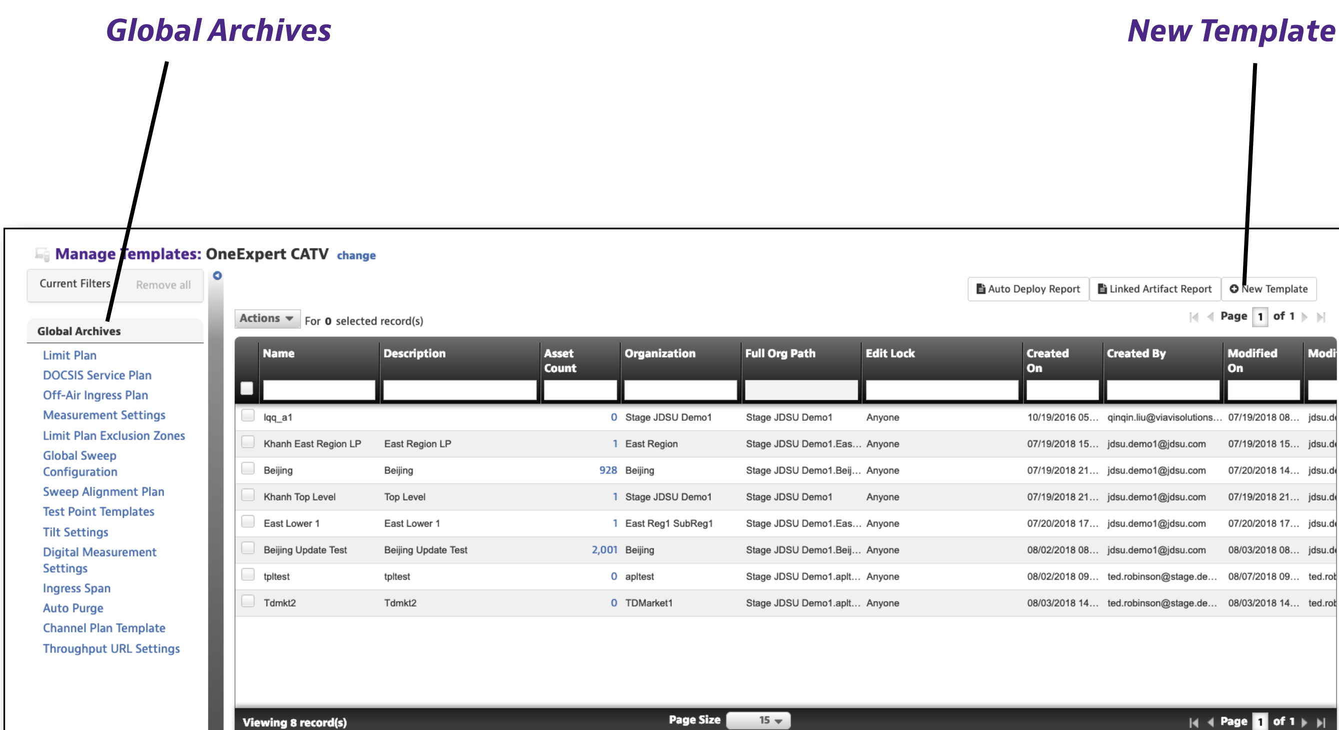

On the left, you will see the **Global Archives**, the repository for all the artifacts to build configuration templates for your assets (e.g. Limit plans, DOCSIS service plans, etc.).

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 instuments, 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**.

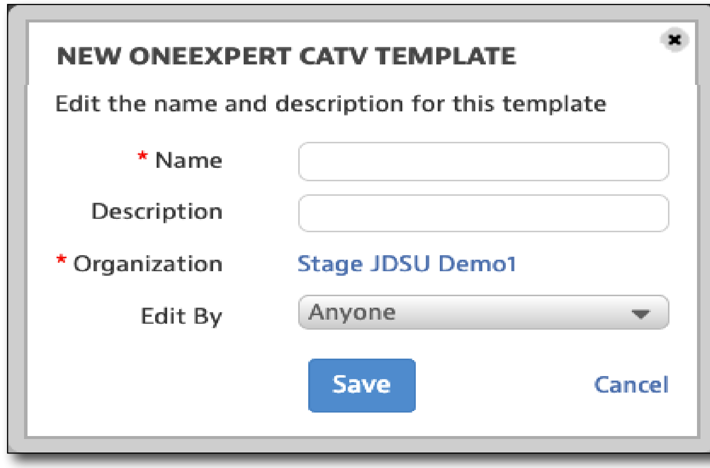


## Adding new configuration templates

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 shoud be able to edit, and click **Save**.

The new configration 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

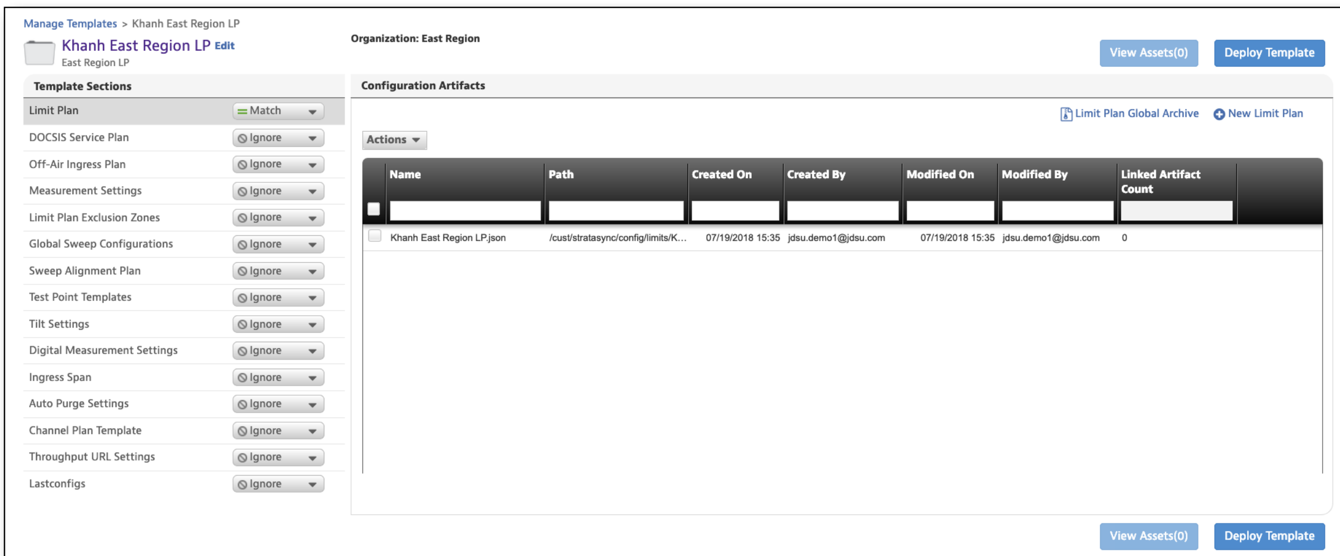
If you have the appropriate permissions, you can edit template artifacts.

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.

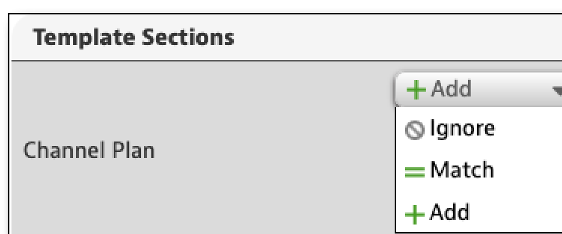
**Note:** This feature is dependent on the instrument and may not be available for all products.




**Editing template artifacts**

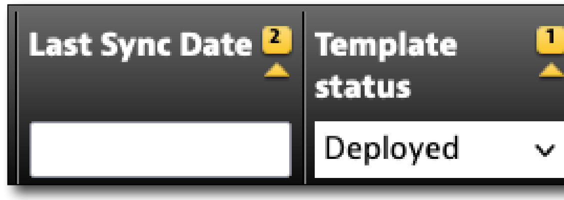
## Changing the deployment policy

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.

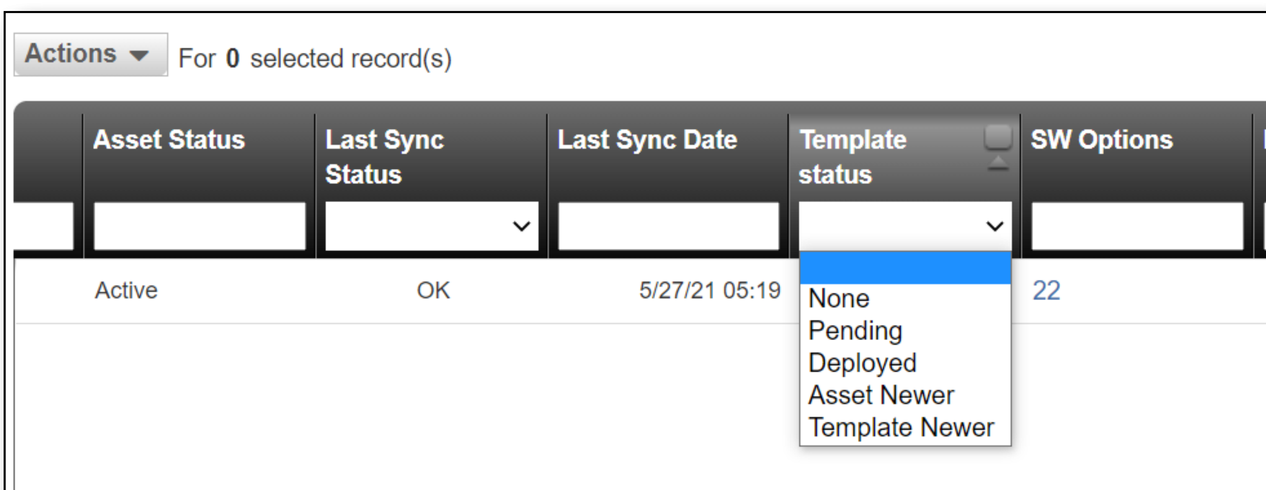
- **None –** No current status
- **Pending** – Template is pending to be deployed to the asset
- **Deployed** –Template has been deployed to the asset
- **Asset Newer** – The instrument user modified the template on the asset after the server template version was created.

  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.

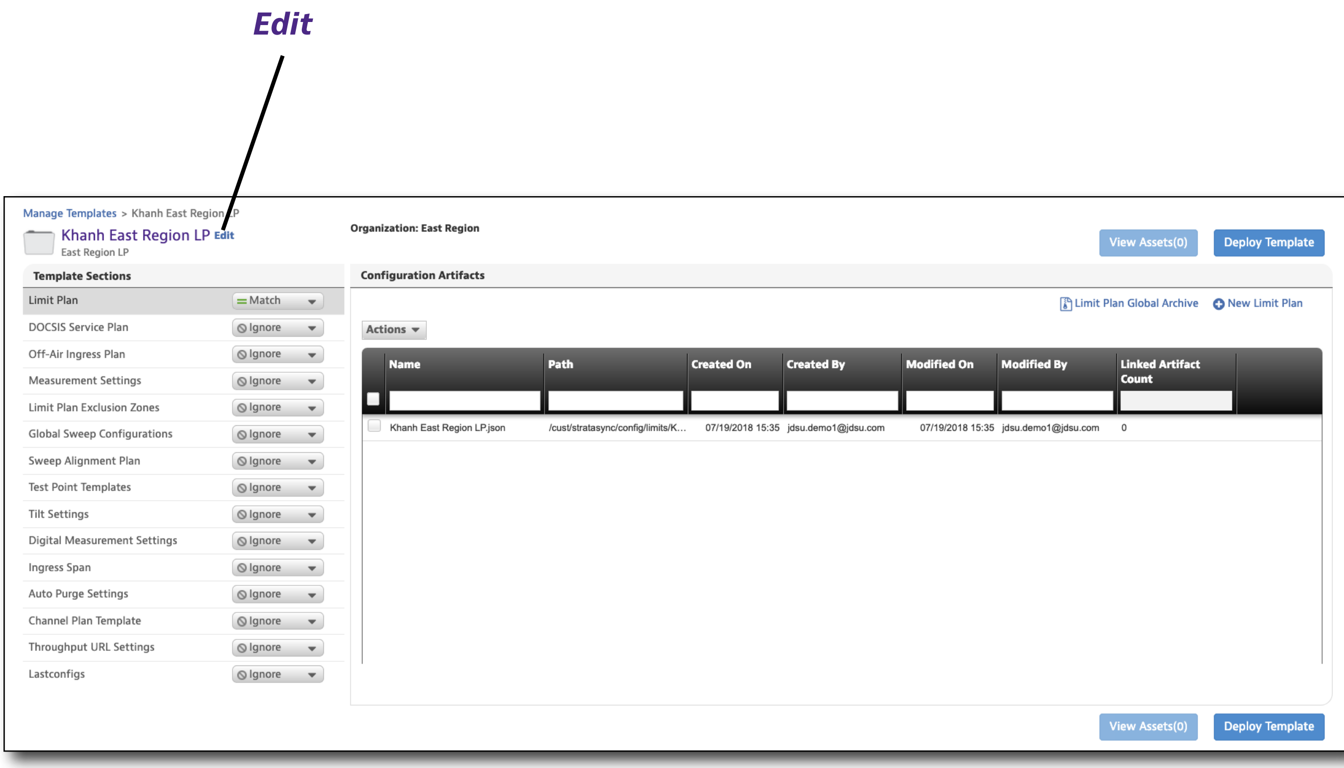
If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.



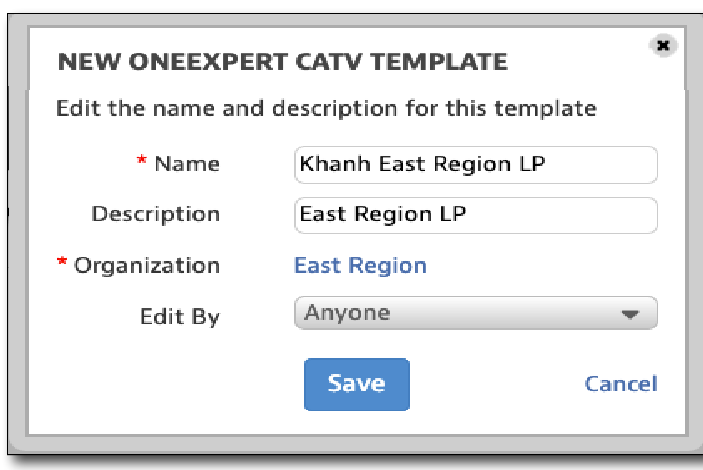

**Sorting by template status**

# 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.

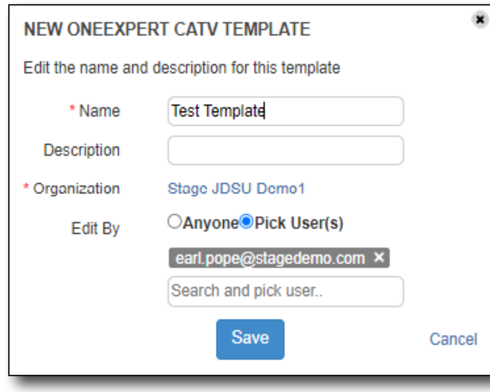



Edit the information as needed, and click **Save**.



### *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.

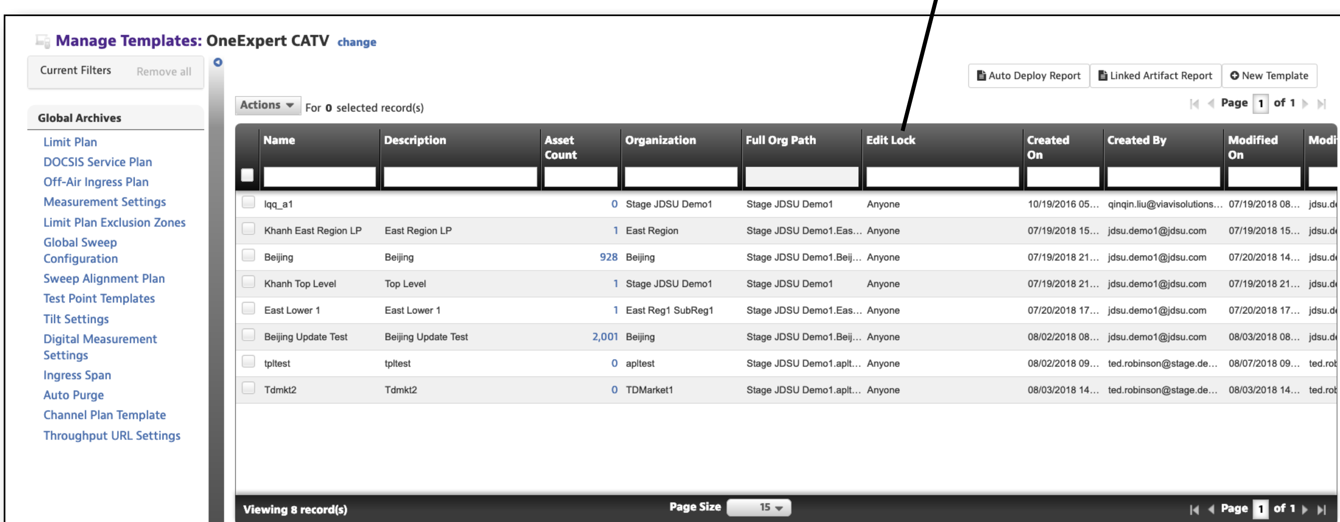
  Deployment policy options are also disabled for all other users.

- **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.

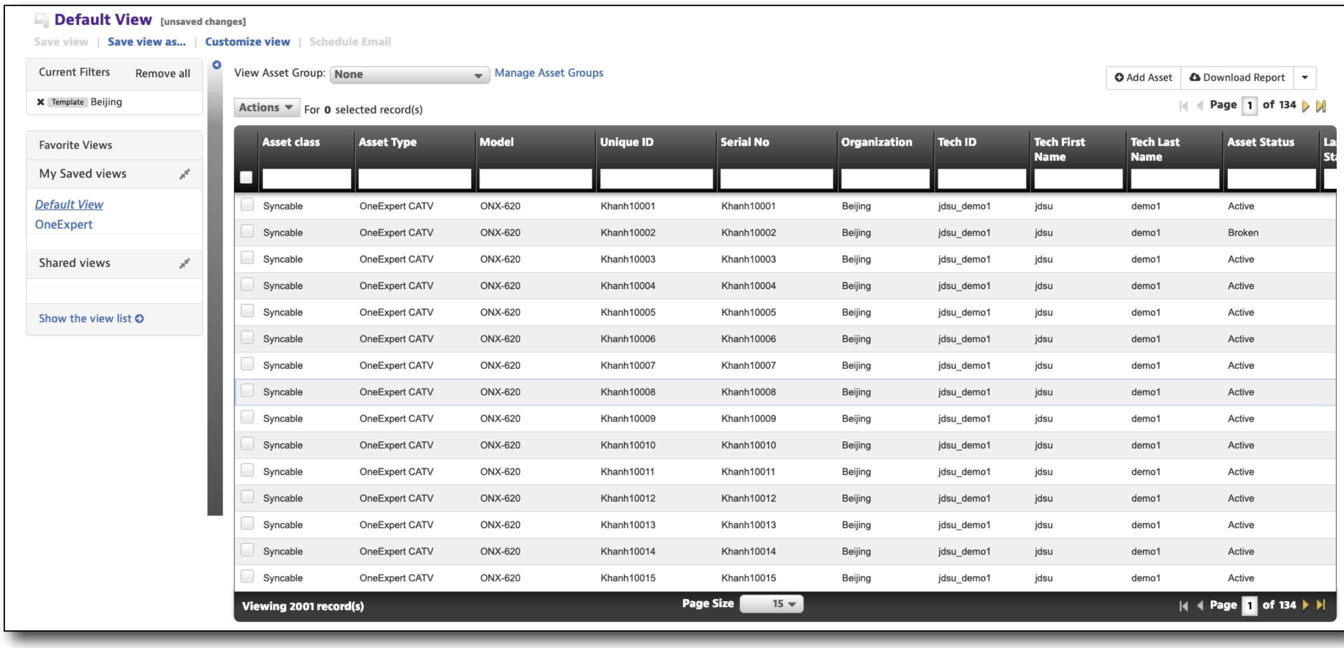
***Edit Lock column***



## Viewing associated assets

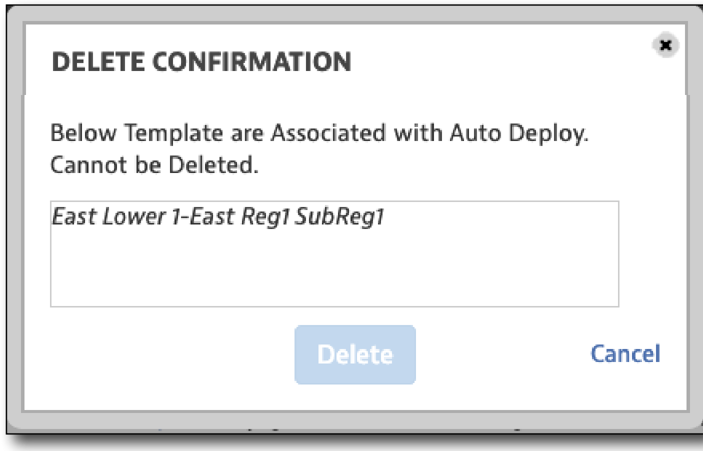
To see what assets are associated to a template, right-click the template on any menu and select ***View Associated Assets*** from the dropdown (or use the **Actions** dropdown). The Associated Assets screen is displayed.

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



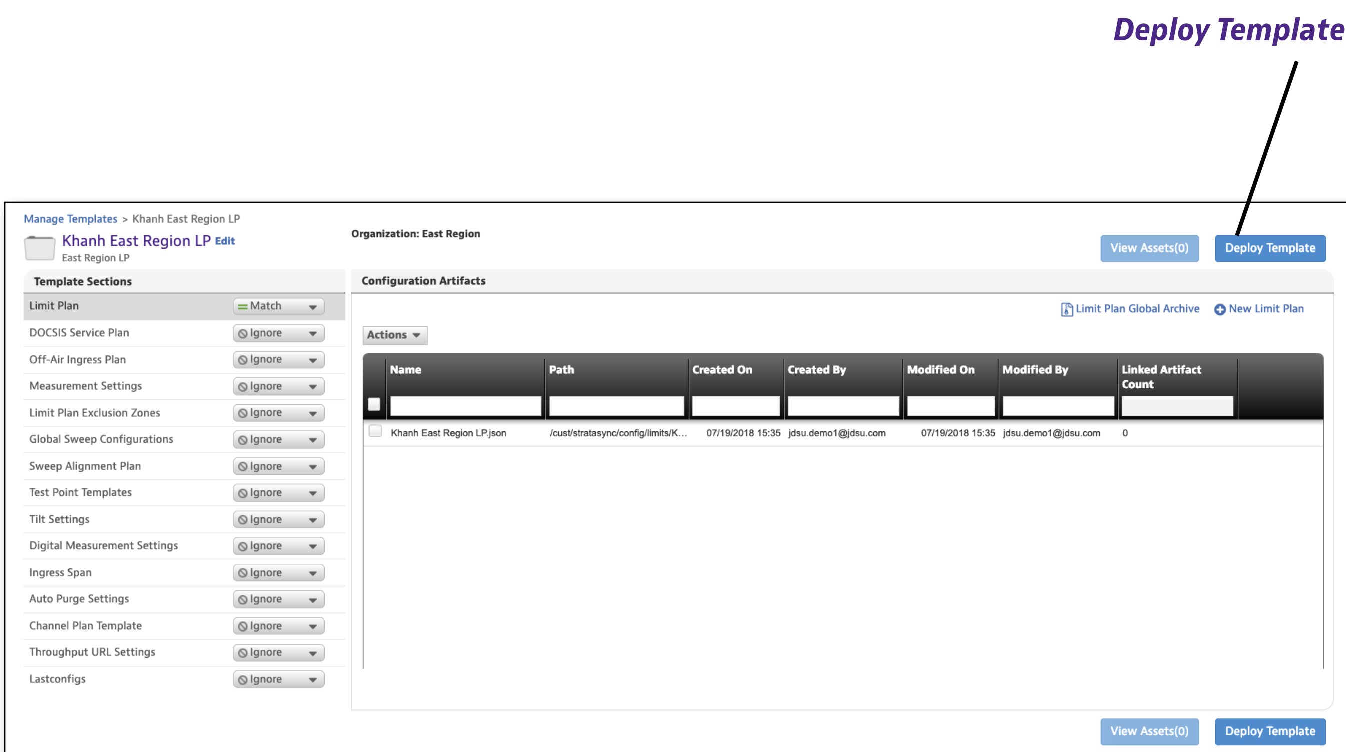
## Deleting configuration templates

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

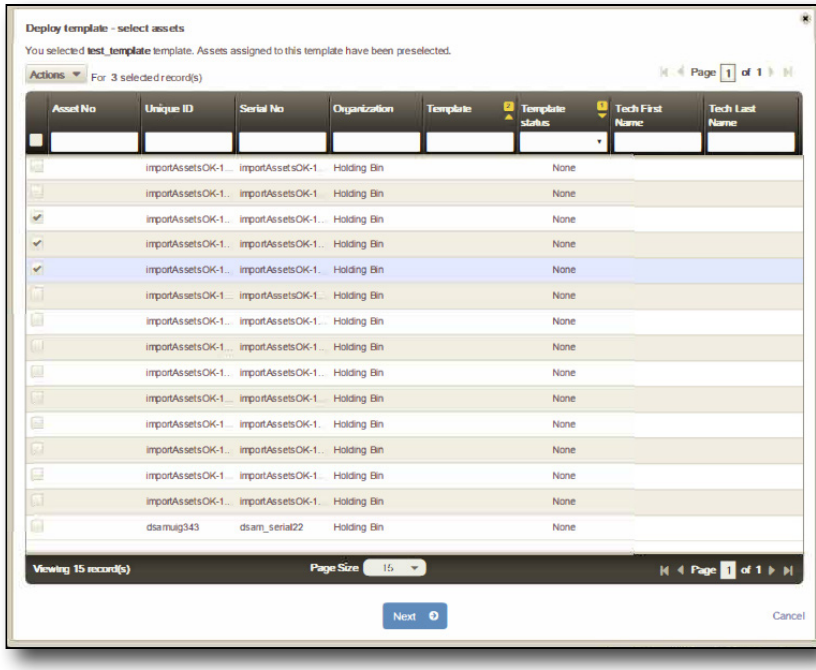



## Deploying configuration templates

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

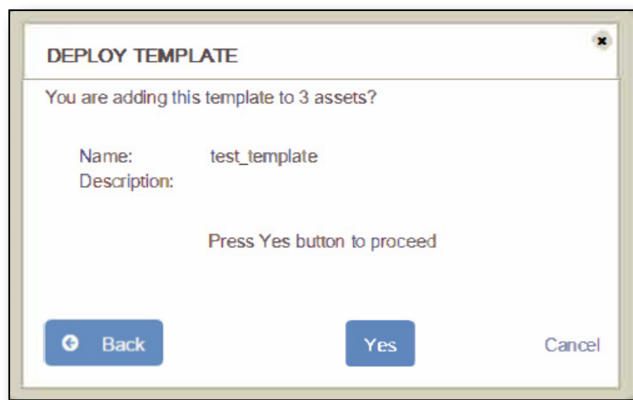


Select the assets where you want to deploy the selected template. When done, click **Next.**




A confirmation screen will ask if you want to deploy the template. Click **Yes** to confirm.

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



### *Auto deploy settings*

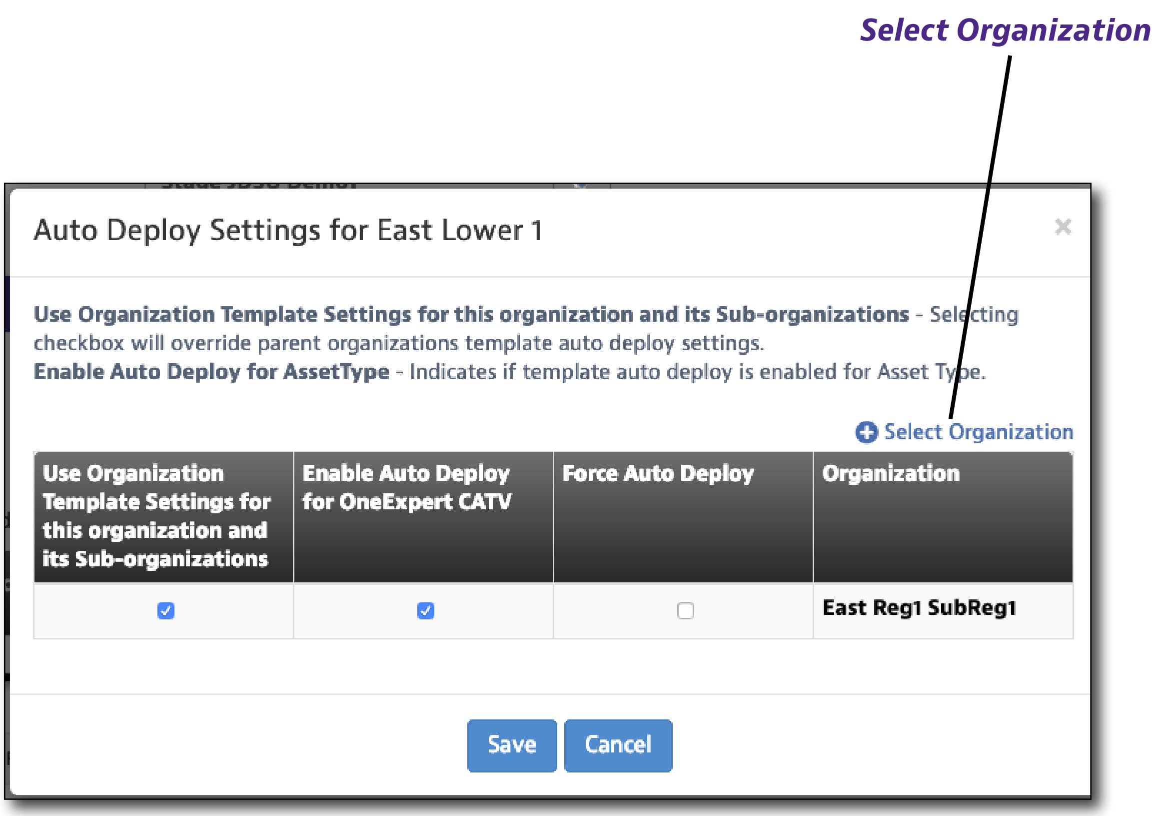
You can set up auto deploy settings for any configuration template. Right-click the template on any menu and select ***Auto Deploy Settings*** from the dropdown (or use the **Actions** menu). The Auto Deploy Settings screen is displayed.

The options are:

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

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

When done, click **Save**.

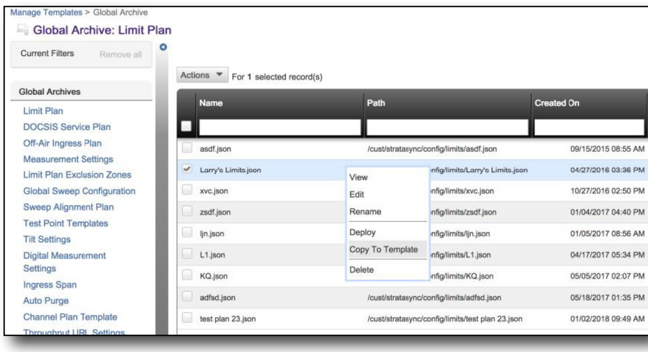


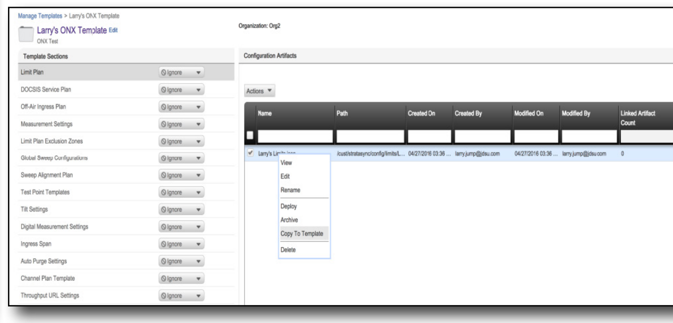
# Artifact linking

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

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

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



Linking from a Global Archive artifact

Linking from a template artifact

### *Actions that update linked artifacts*

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

See *"Template settings" on page 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.

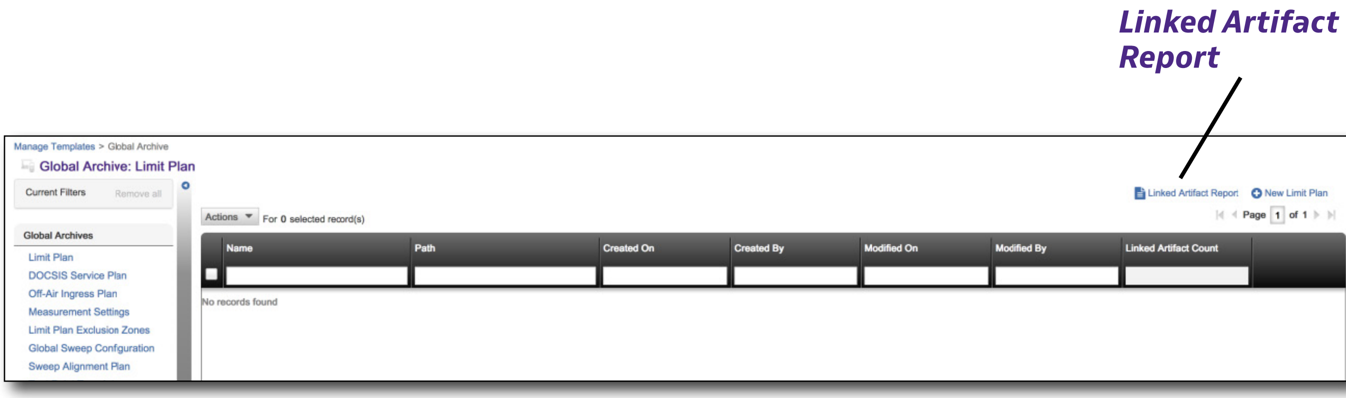
If disabled links are re-enabled, artifacts will be re-synced to all artifacts with linked artifacts and templates will be deployed based on current auto deploy settings.

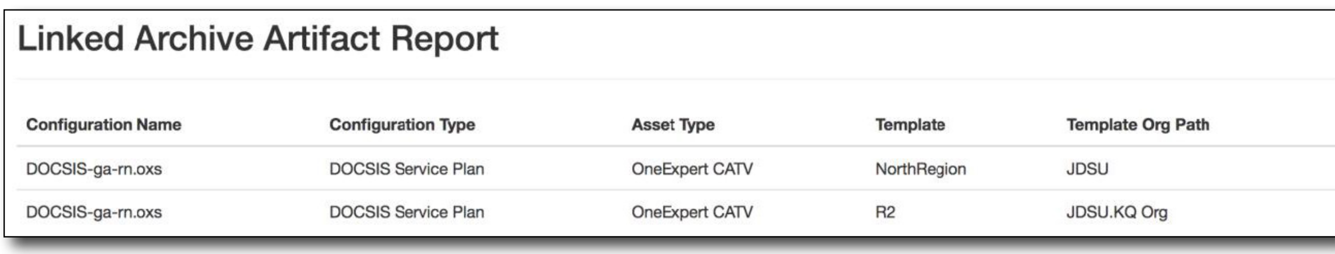
## Reporting

### *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.



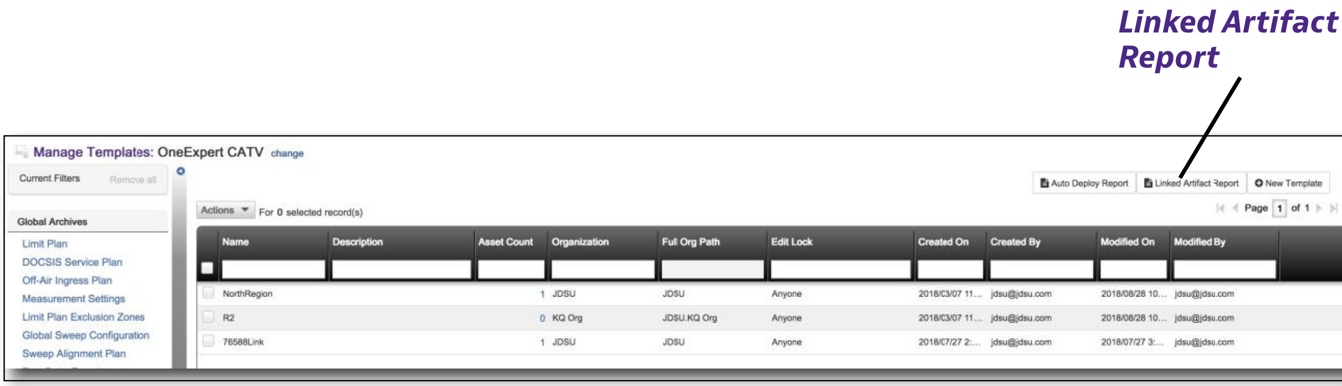
Linked Archive Artifact Report

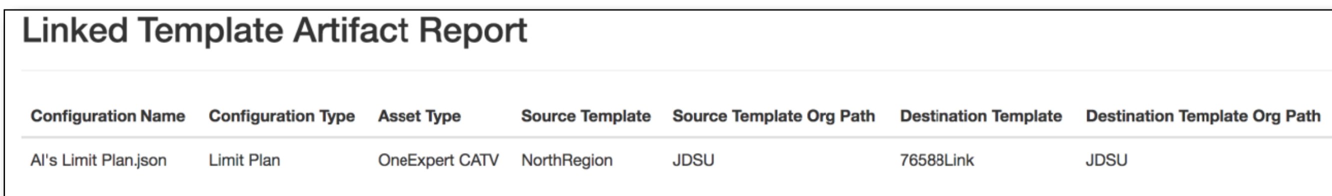
| Configuration Name | Configuration Type | Asset Type | Template | Template Org Path |
|---|---|---|---|---|
| DOCSIS-ga-rn.oxs | DOCSIS Service Plan | OneExpert CATV | NorthRegion | JDSU |
| DOCSIS-ga-rn.oxs | DOCSIS Service Plan | OneExpert CATV | R2 | JDSU.KQ Org |

### *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.



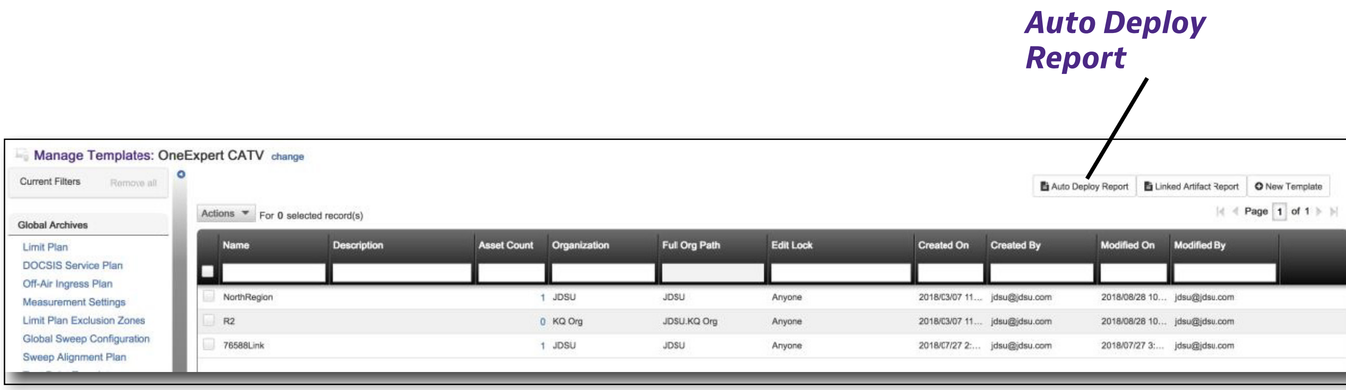
## Linked Template Artifact Report

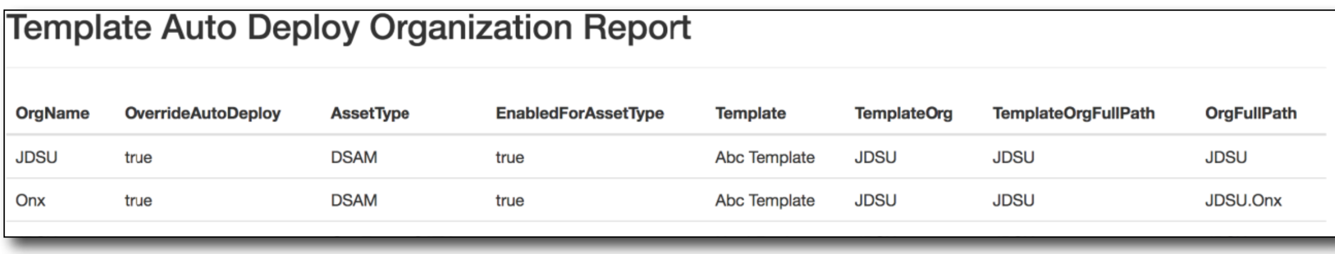
| Configuration Name | Configuration Type | Asset Type | Source Template | Source Template Org Path | Destination Template | Destination Template Org Path |
|---|---|---|---|---|---|---|
| Al's Limit Plan.json | Limit Plan | OneExpert CATV | NorthRegion | JDSU | 76588Link | JDSU |

### *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 organziations.



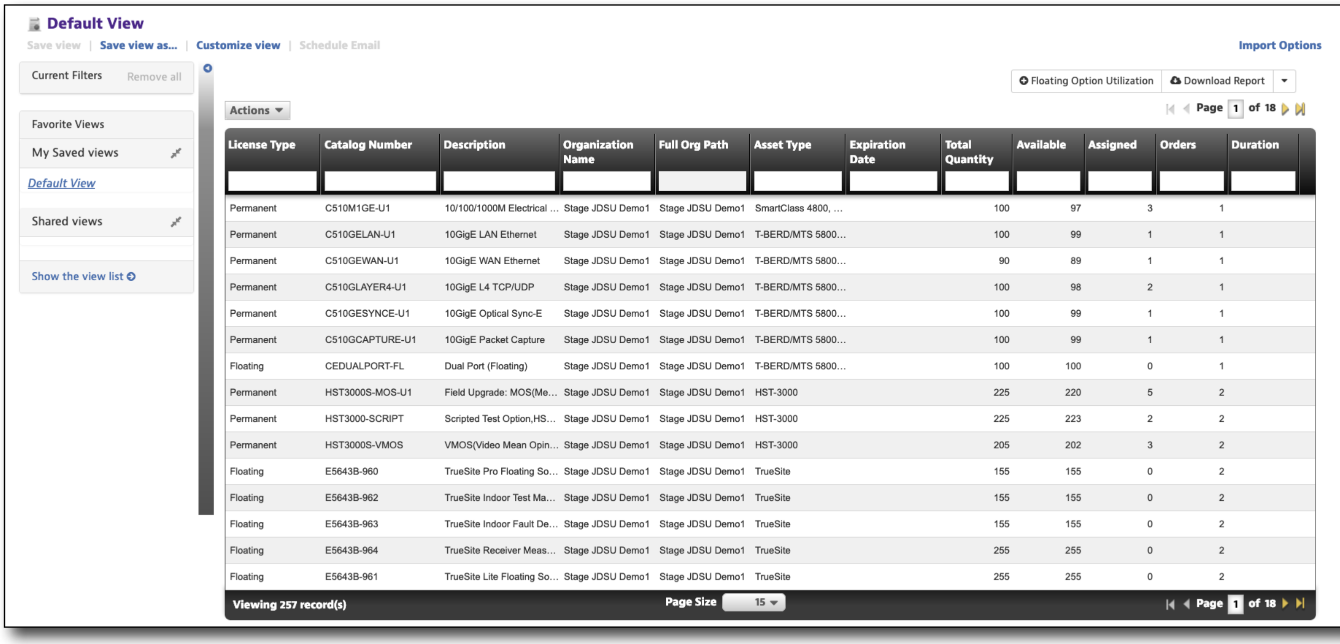
Template Auto Deploy Organization Report

| 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.

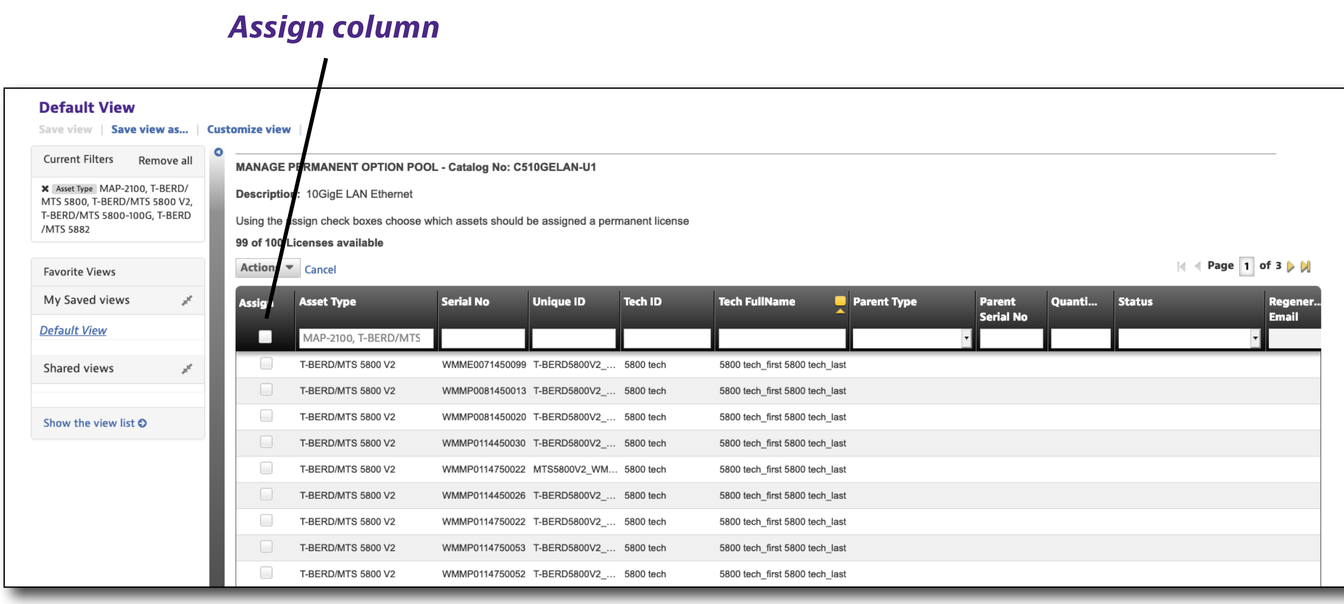
Select the **Assets** tab, then select ***Manage Asset Options***. The Manage Software Options screen appears.



## 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.

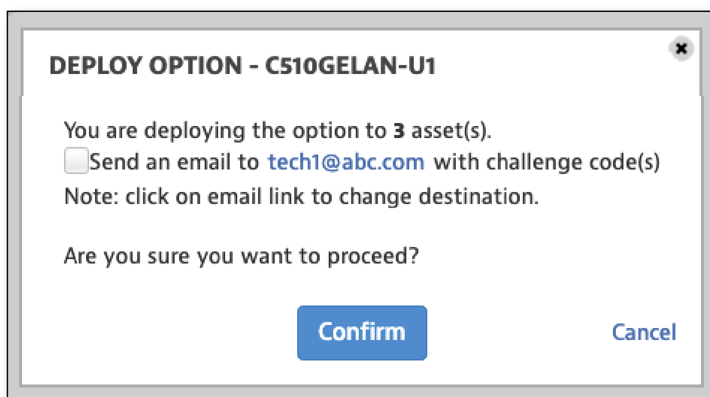
Select the **Assign** checkboxes on the left for the assets you want to apply the software option, then select ***Deploy*** from the **Actions** dropdown.




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**.

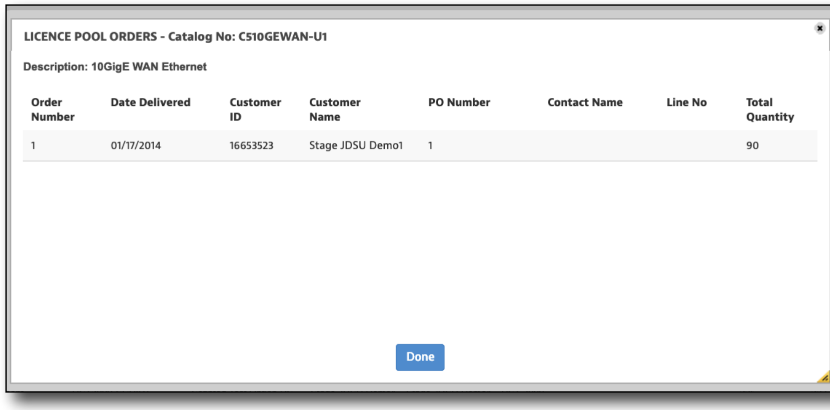
The option will be deployed to the assets on the next sync.



## 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.

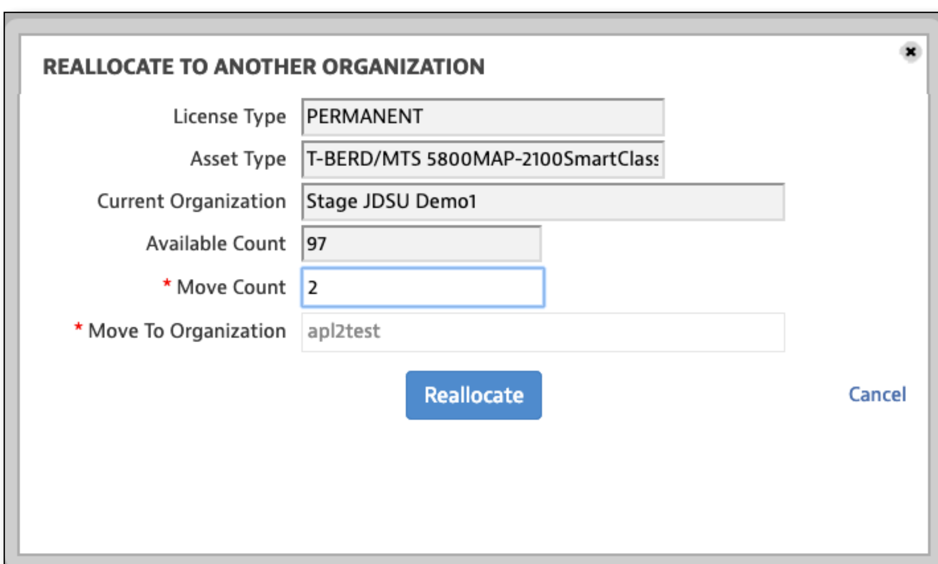
Here you can see the individual purchases of software options that make up the selected pool.




## 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**.

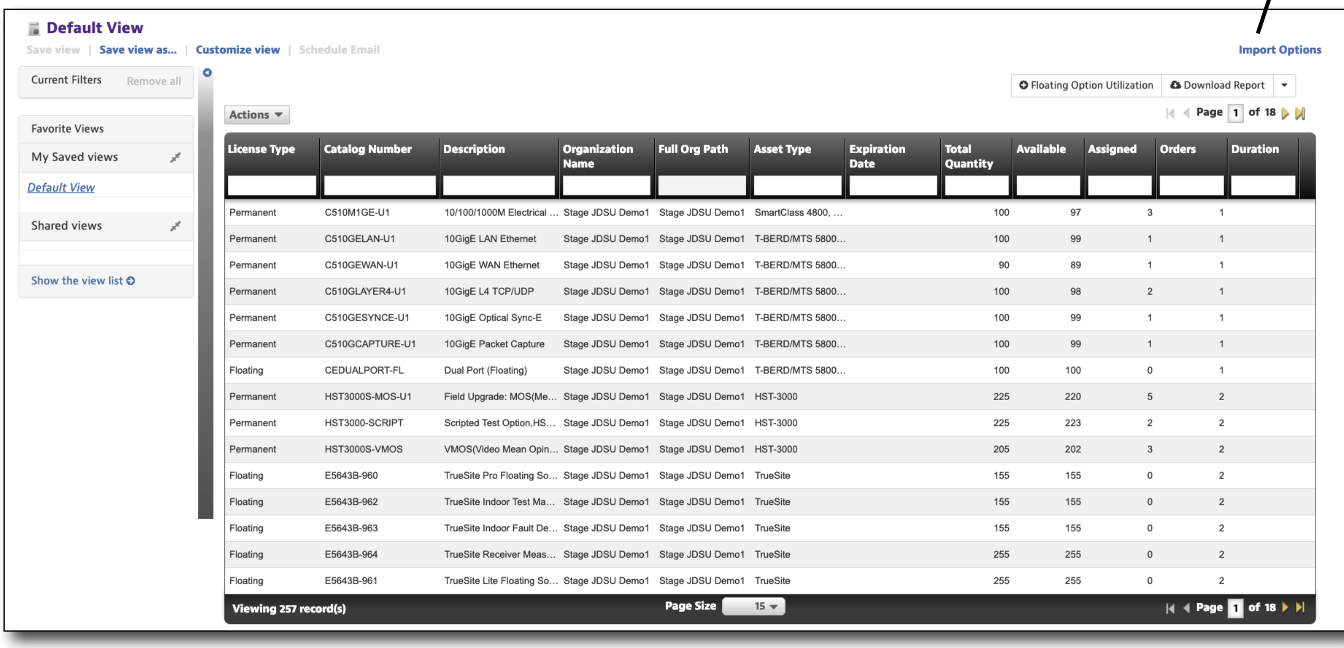


# Importing options

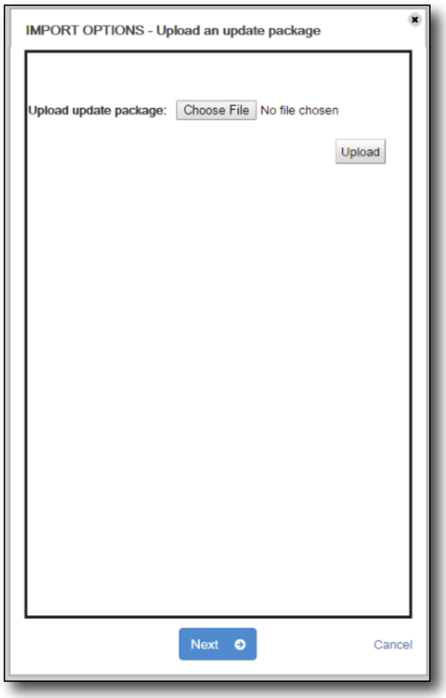
You can import the list of software options as an bundle file and then deploy to your assets.

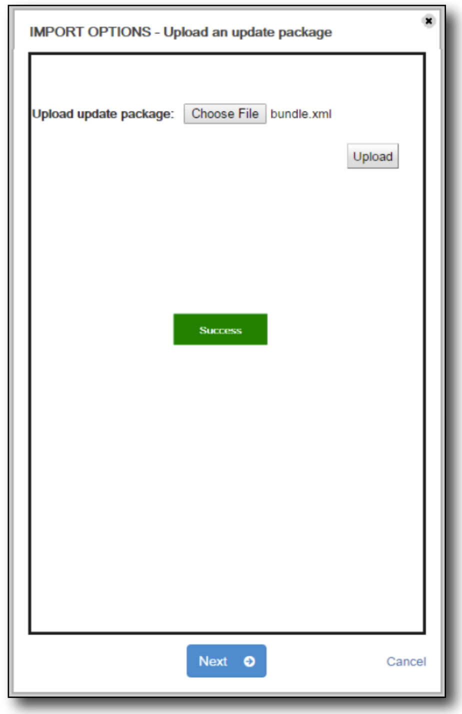
From the Manage Asset Options screen, select **Import Options** at the top right. The Import Options screen is displayed.

***Import Options***



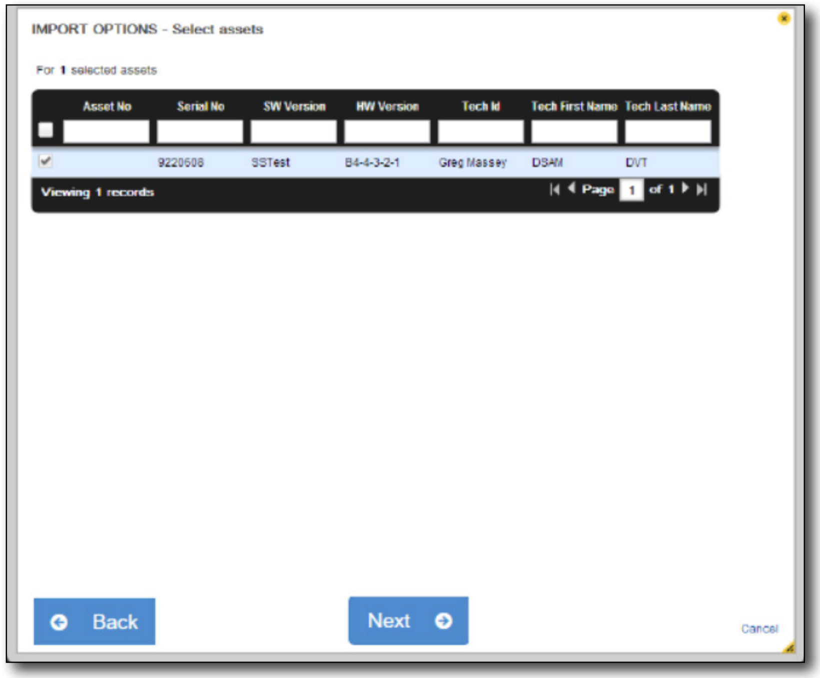
1. Select **Choose File** and find the file you want to upload, then select **Upload**. Success is indicated after uploading. The options package will then be available to assign to your assets.
2. Click **Next.** The Select Assets screen is displayed.



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

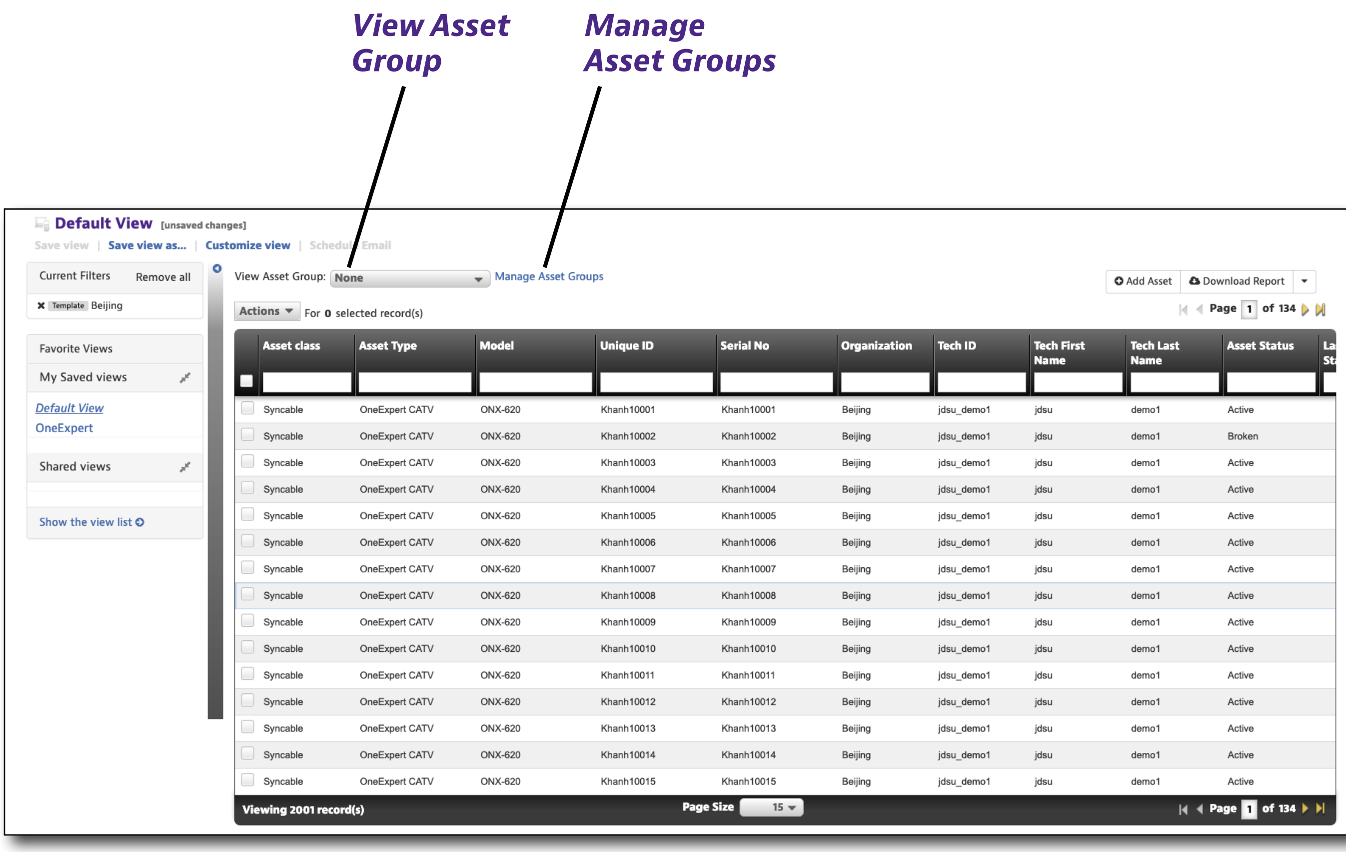
   The option will be deployed to the assets on the next sync.



# Managing asset groups

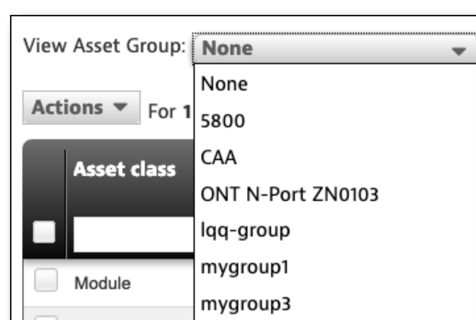
This feature allows you to organize your assets for easy management and deployment.

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



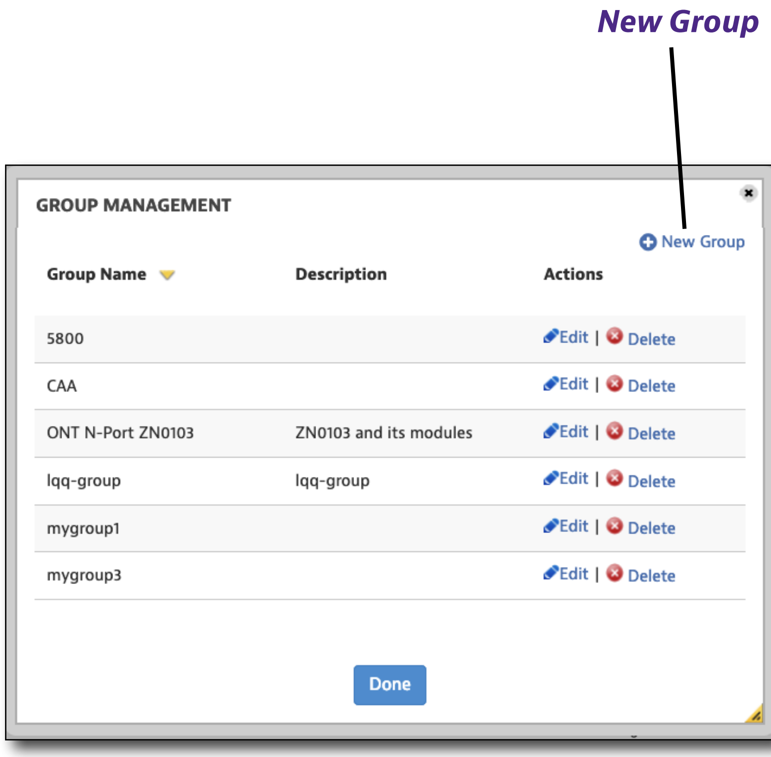

## Viewing asset groups

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.

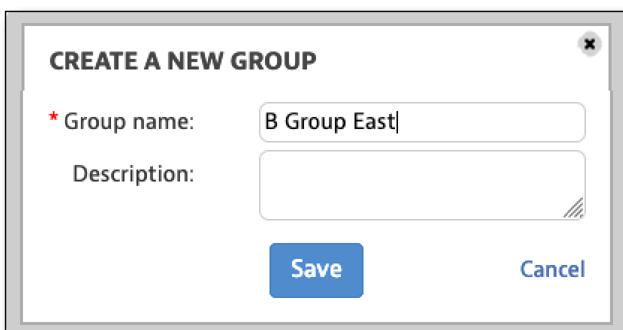



### *Adding new groups*

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

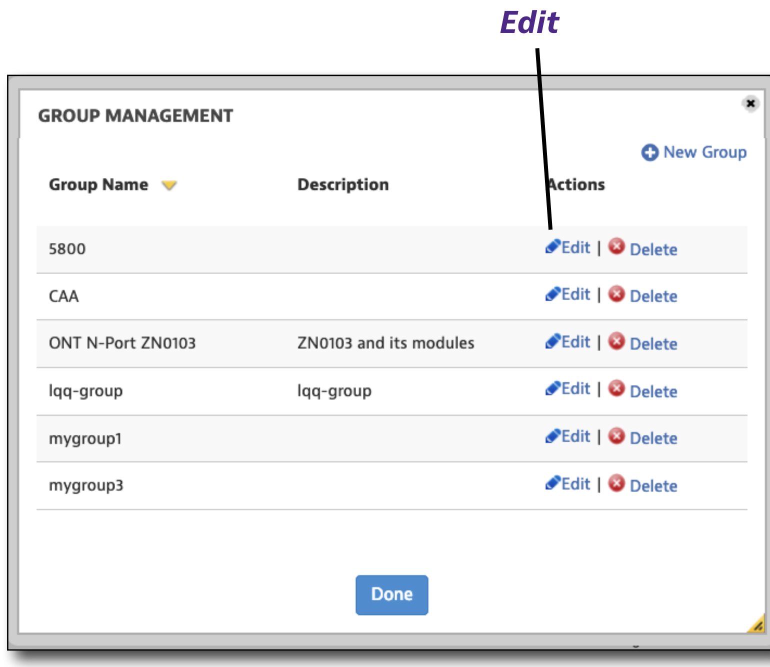
Enter a group name and description, and click **Save**.

The new group will appear in the list.

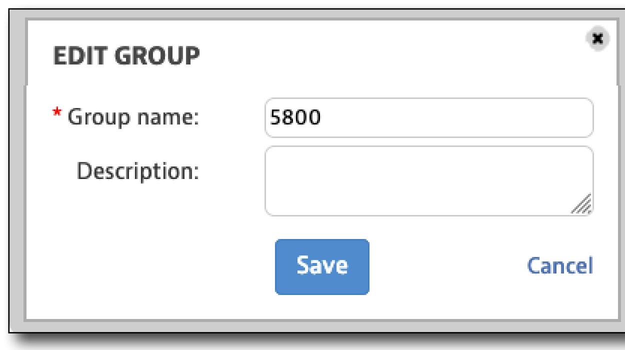


### *Editing groups*

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

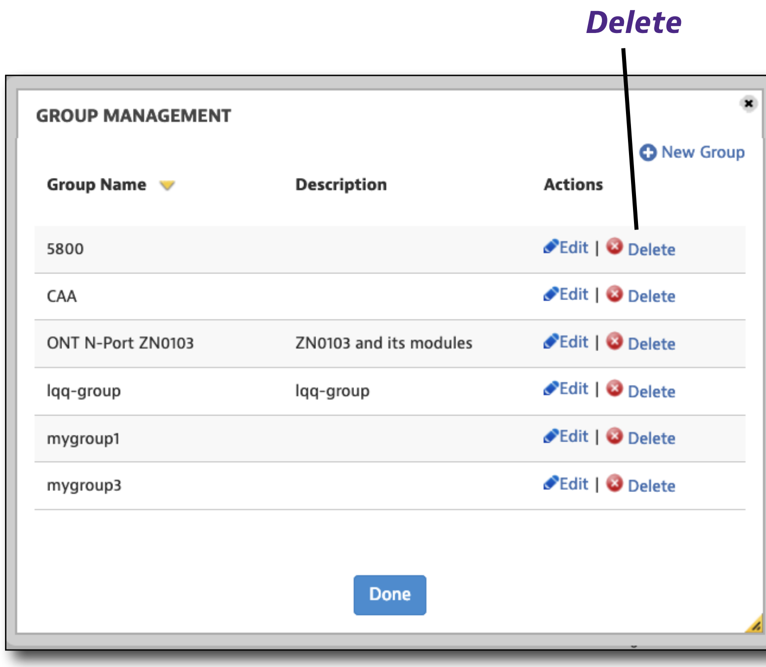



Edit the information as needed, and click **Save**.

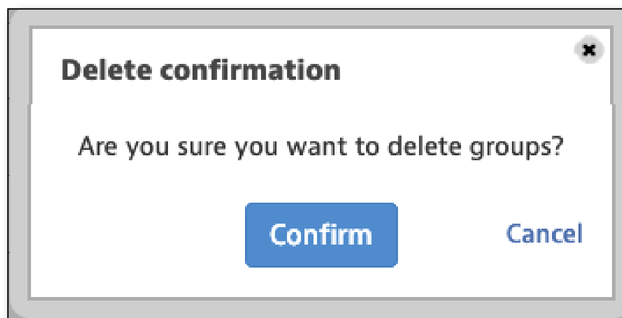


### *Deleting groups*

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




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



7

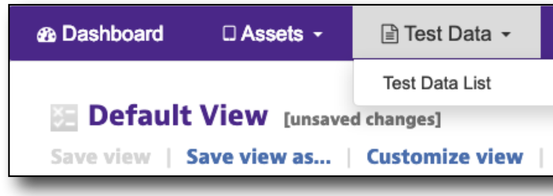
# Test Data

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

# Test Data

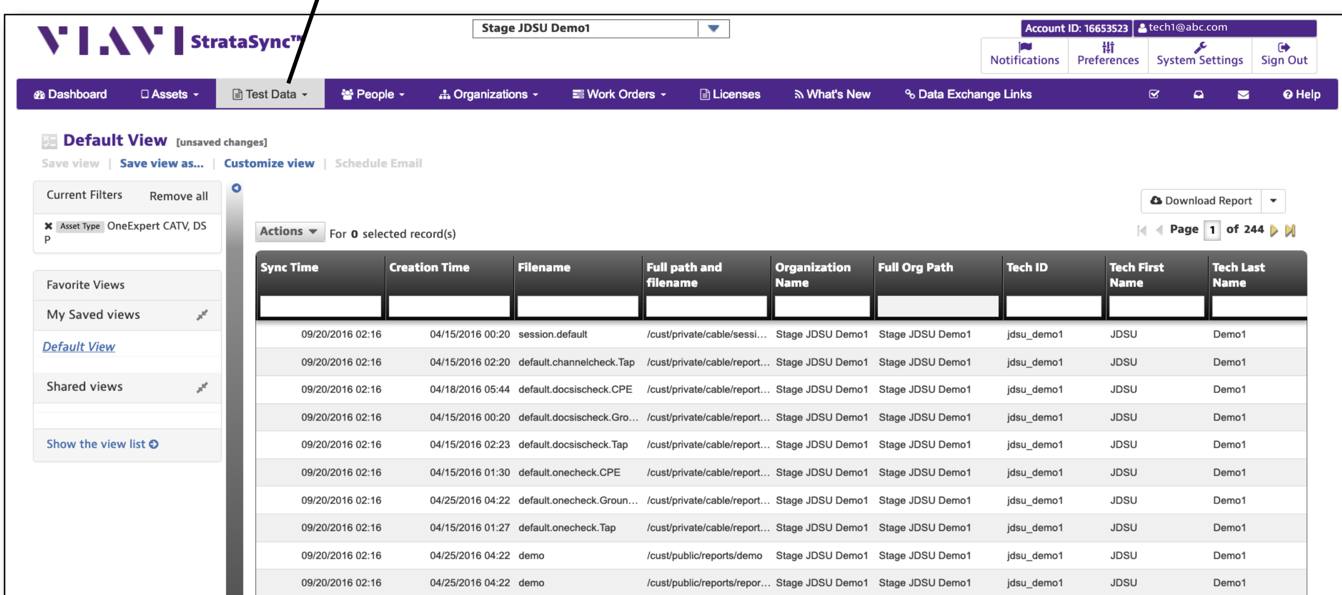
The **Test Data** tab is the hub for all of the test data uploaded from your field instruments to your StrataSync account.

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.

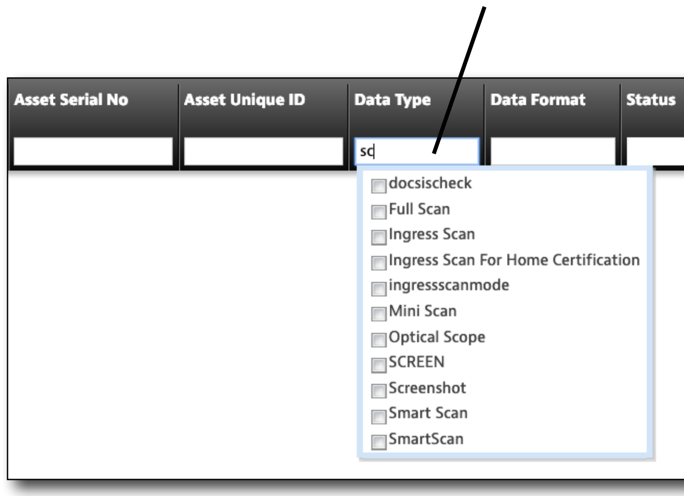
## Searching

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.

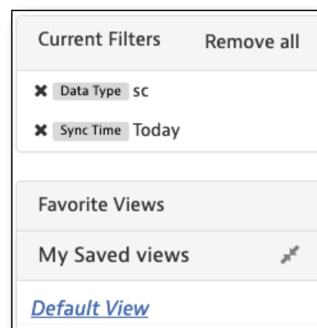
The available data types are dependent on the selected instruments.

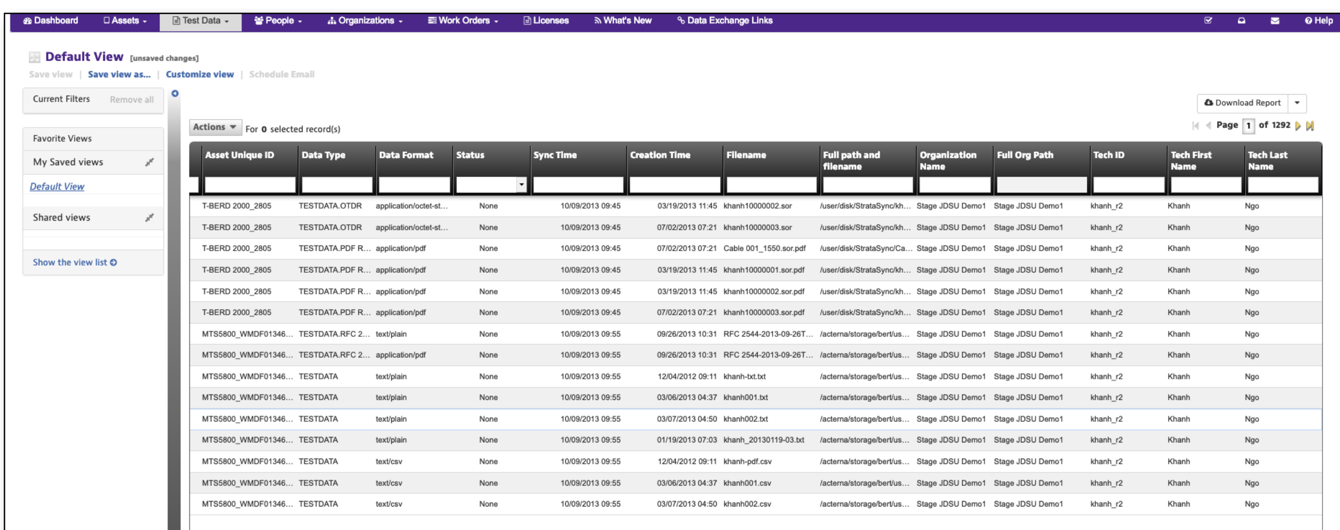
***Search bar***




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.



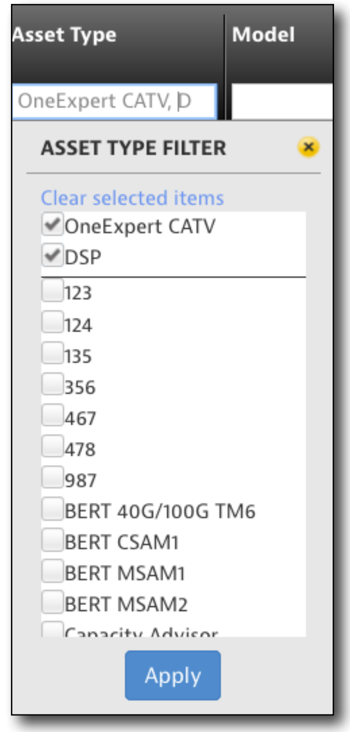




**Scroll to the right to reveal more detail, including Organization name and Tech ID.**

### *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.

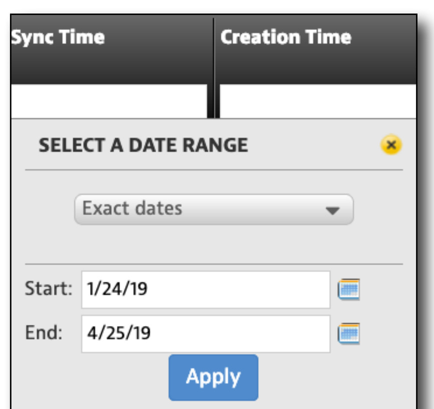



> ***NOTE:***
>
> ***Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.***

### *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**.

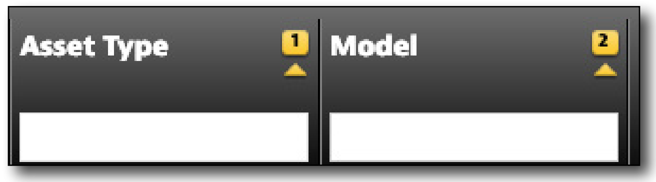
Again, the filter criteria is listed under the Current Filters section on the left. Click the (x) to remove the filter. You can also click (x) to remove the filter from the search bar.



***NOTE:***

***You can save custom filters to a favorite view for easy reference. See*** ***"Saving views" on page 173***.

## Sorting



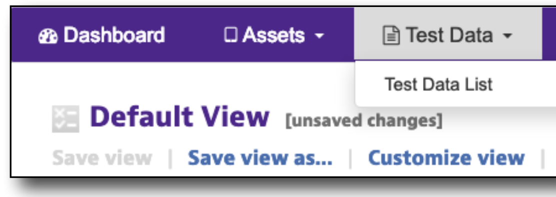

You can also easily sort the columns by clicking the column header arrows to sort by ascending / descending values. Toggle through the options to remove the sort.

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

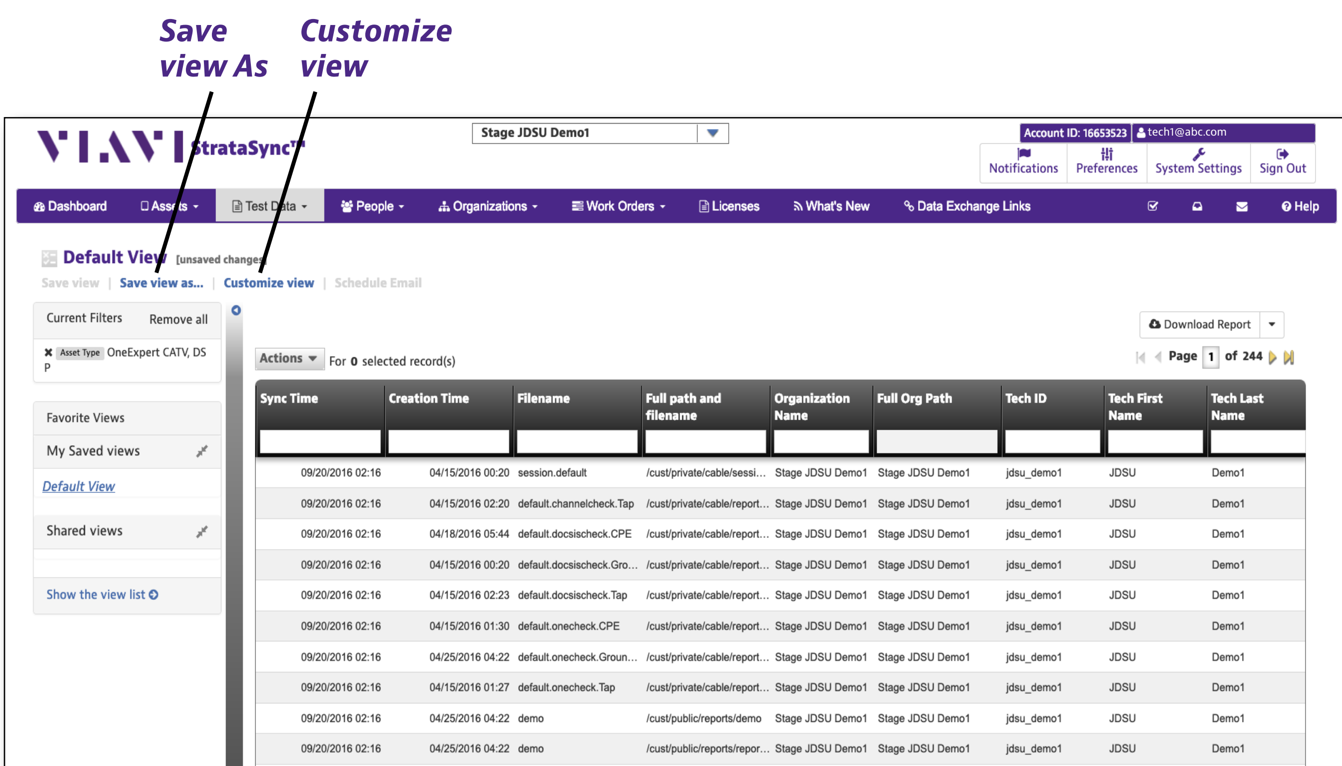
# Views

## Customizing views

StrataSync gives you the ability to customize your list views.

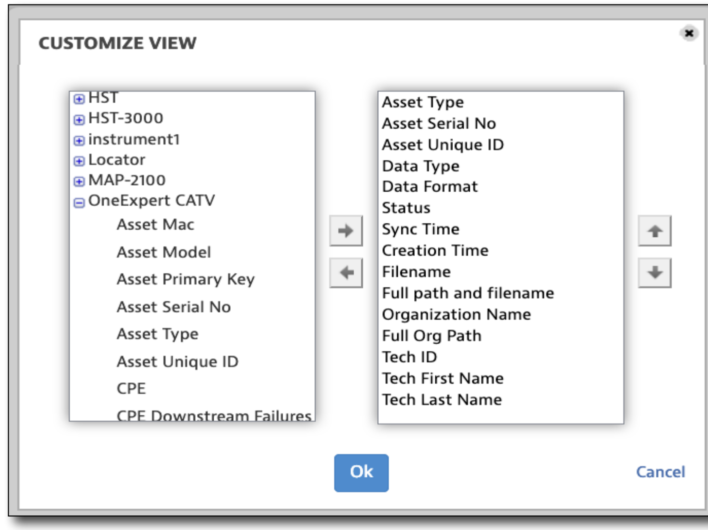



1. Select the **Test Data** tab, and then select ***Test Data List***. The Test Data List appears.
2. Select **Customize view** at the upper left of the screen. The Customize View screens appears.




**Test Data List Default View**

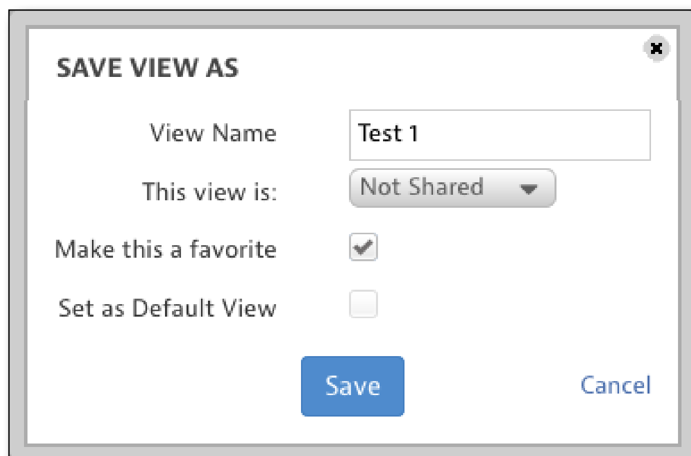
3. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
4. Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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




## Saving views

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

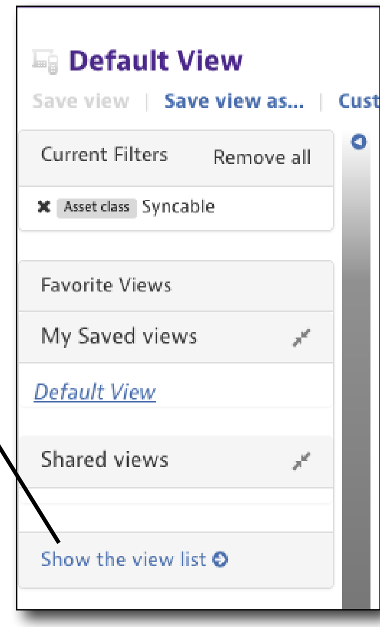
   The new view is listed under the Favorite Views section on the left.



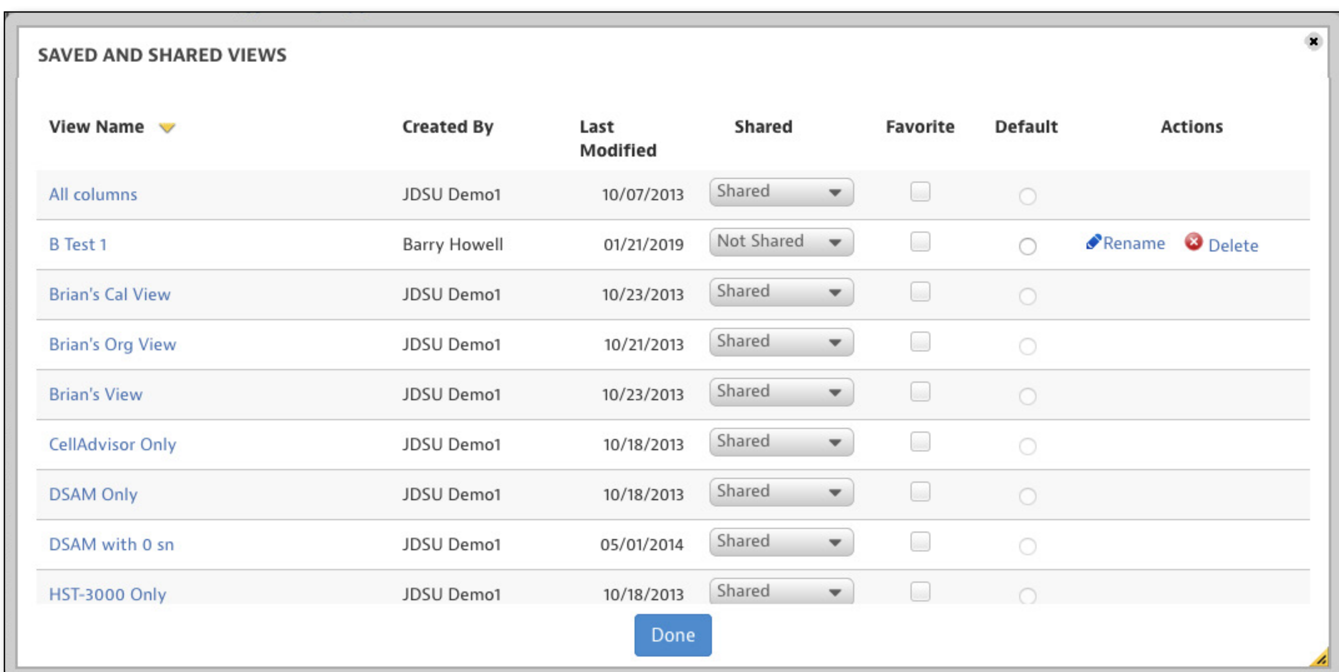
## Sharing and editing views

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

***Show the view list***




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


SAVED AND SHARED VIEWS

| View Name | Created By | Last Modified | Shared | Favorite | Default | Actions |
|---|---|---|---|---|---|---|
| All columns | JDSU Demo1 | 10/07/2013 | Shared | | | |
| B Test 1 | Barry Howell | 01/21/2019 | Not Shared | | | Rename Delete |
| Brian's Cal View | JDSU Demo1 | 10/23/2013 | Shared | | | |
| Brian's Org View | JDSU Demo1 | 10/21/2013 | Shared | | | |
| Brian's View | JDSU Demo1 | 10/23/2013 | Shared | | | |
| CellAdvisor Only | JDSU Demo1 | 10/18/2013 | Shared | | | |
| DSAM Only | JDSU Demo1 | 10/18/2013 | Shared | | | |
| DSAM with 0 sn | JDSU Demo1 | 05/01/2014 | Shared | | | |
| HST-3000 Only | JDSU Demo1 | 10/18/2013 | Shared | | | |

Done

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

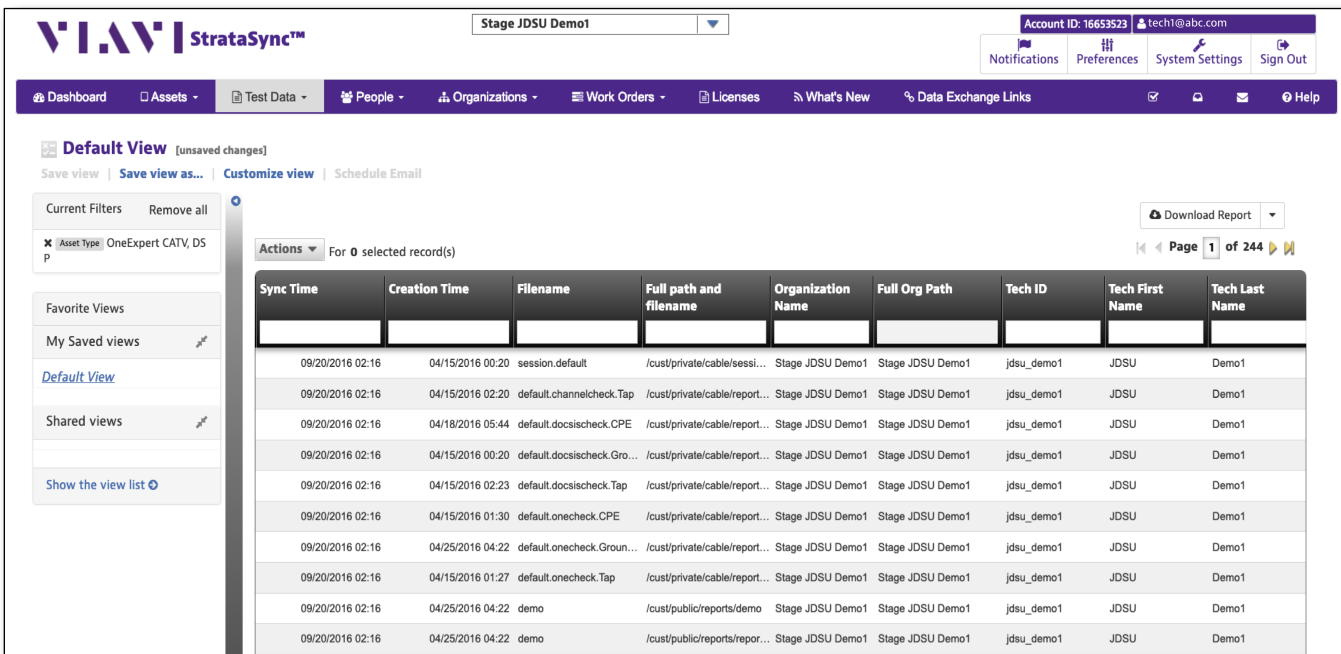
# Test Data List

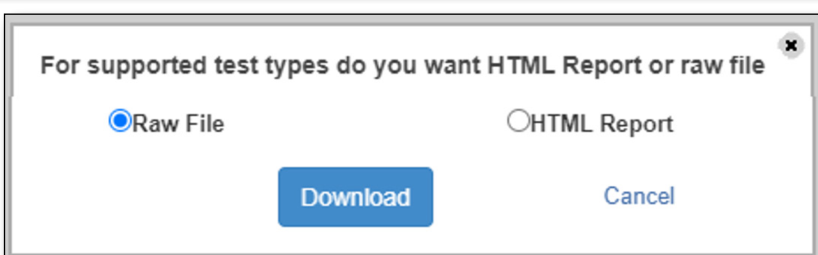
## Downloading test data

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.

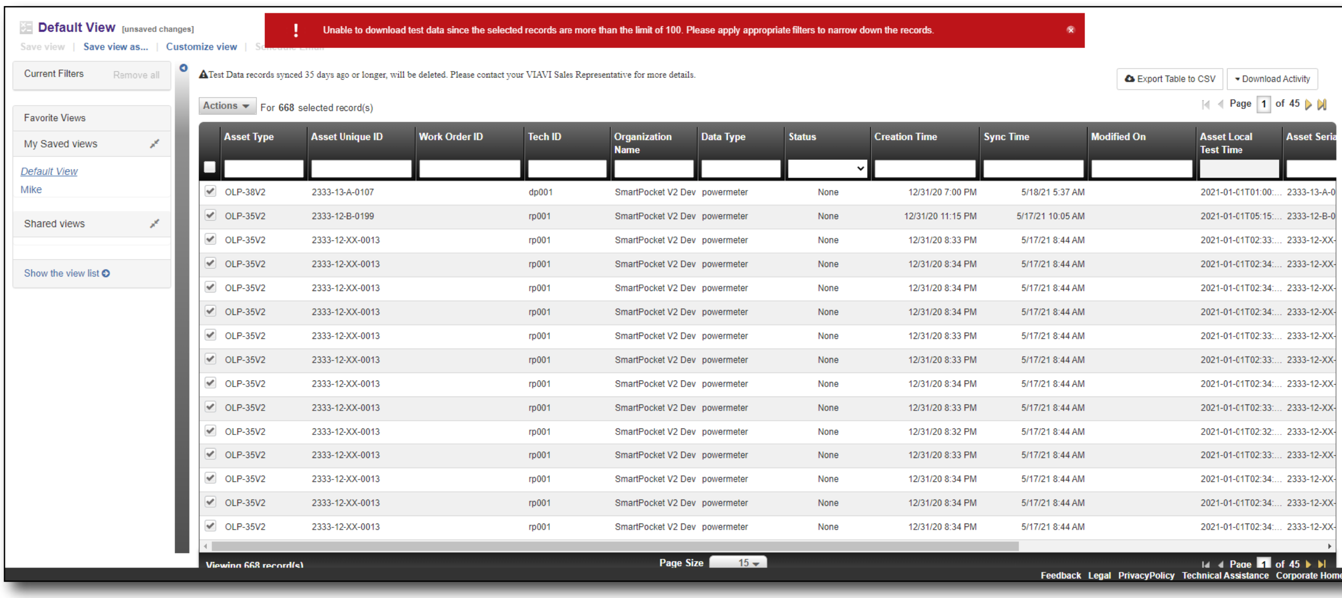



*Choosing the test results download type*

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.

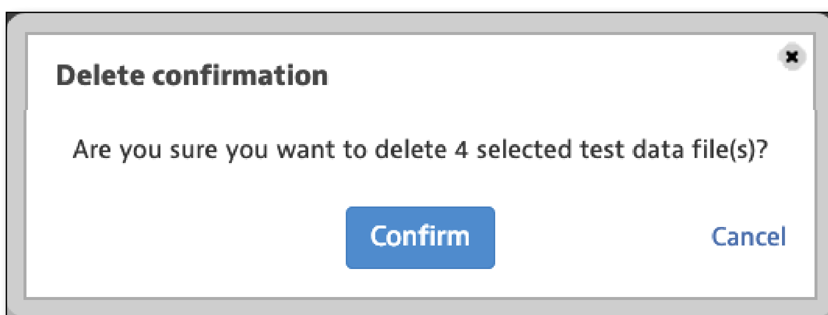



## Deleting test data

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**.



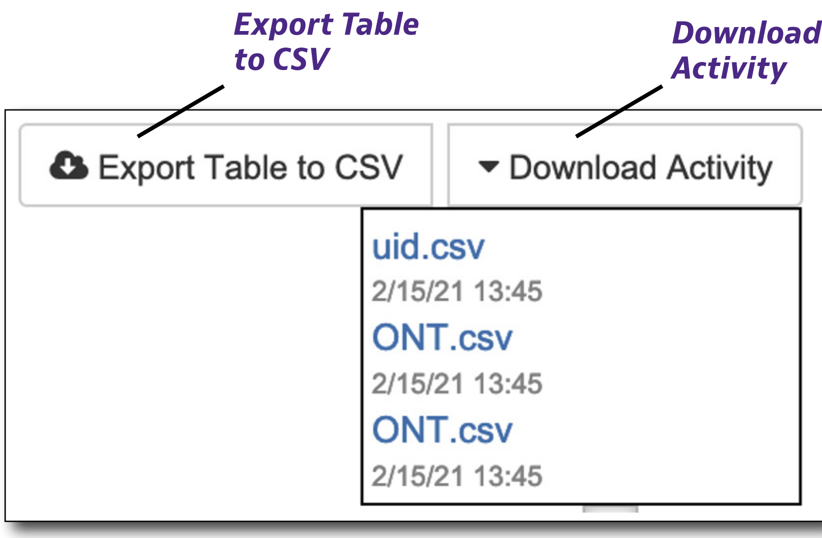
## Exporting lists to CSV

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.

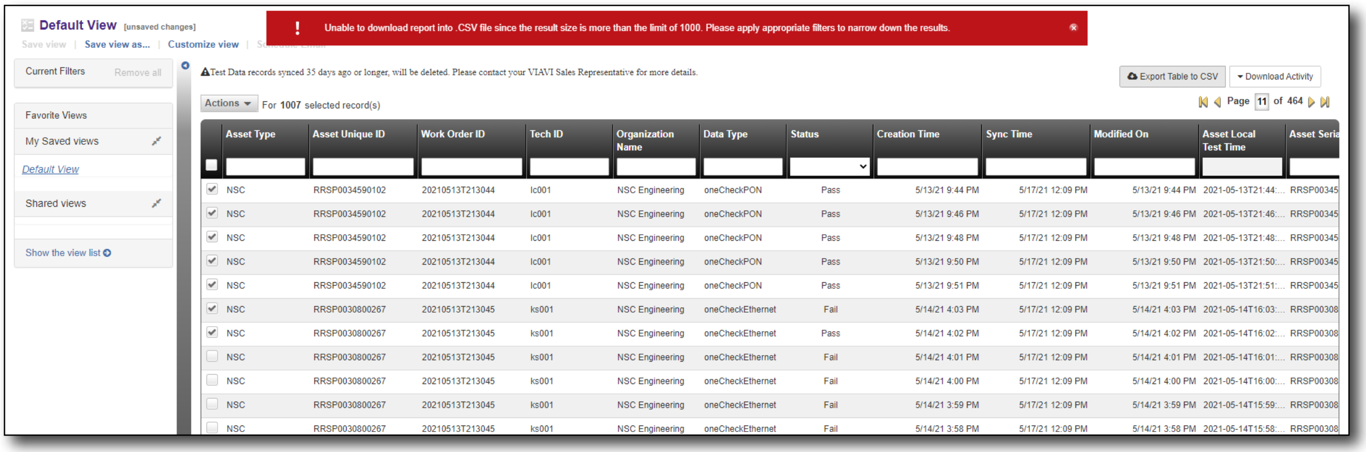
Please note that to provide better UI responsive and overall system performance, users cannot initiate another download action until the previous one has completed.




*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.



8

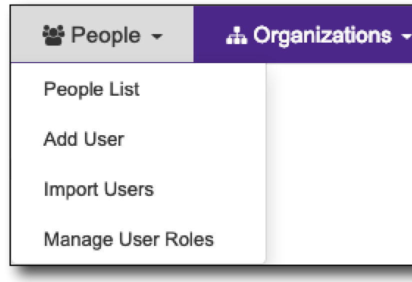
# People

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

# People

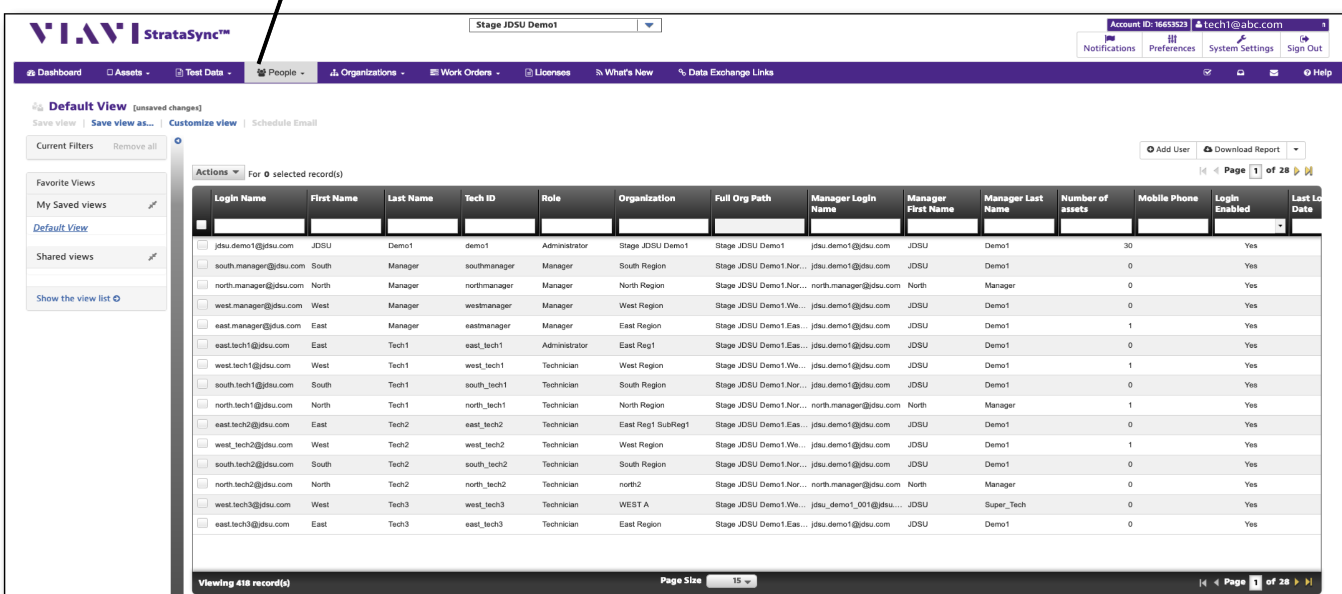
The **People** tab is the hub for all of the user and role management features of your StrataSync account, including: adding and importing users, and managing those users' roles and permissions.

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




People dropdown menu

People tab



People List selected from the People tab

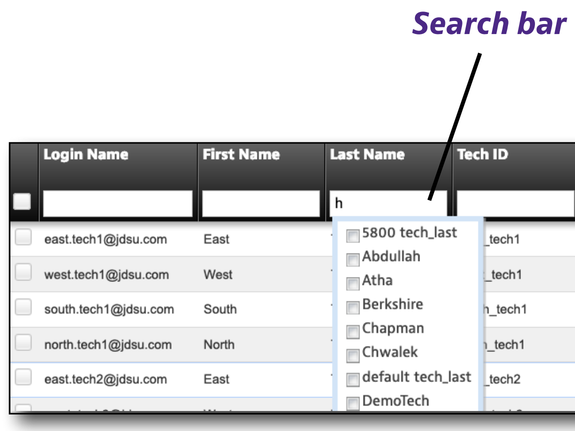
# Searching and sorting

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

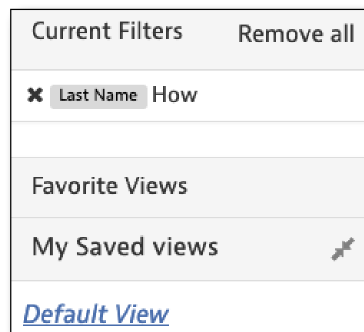
## Searching

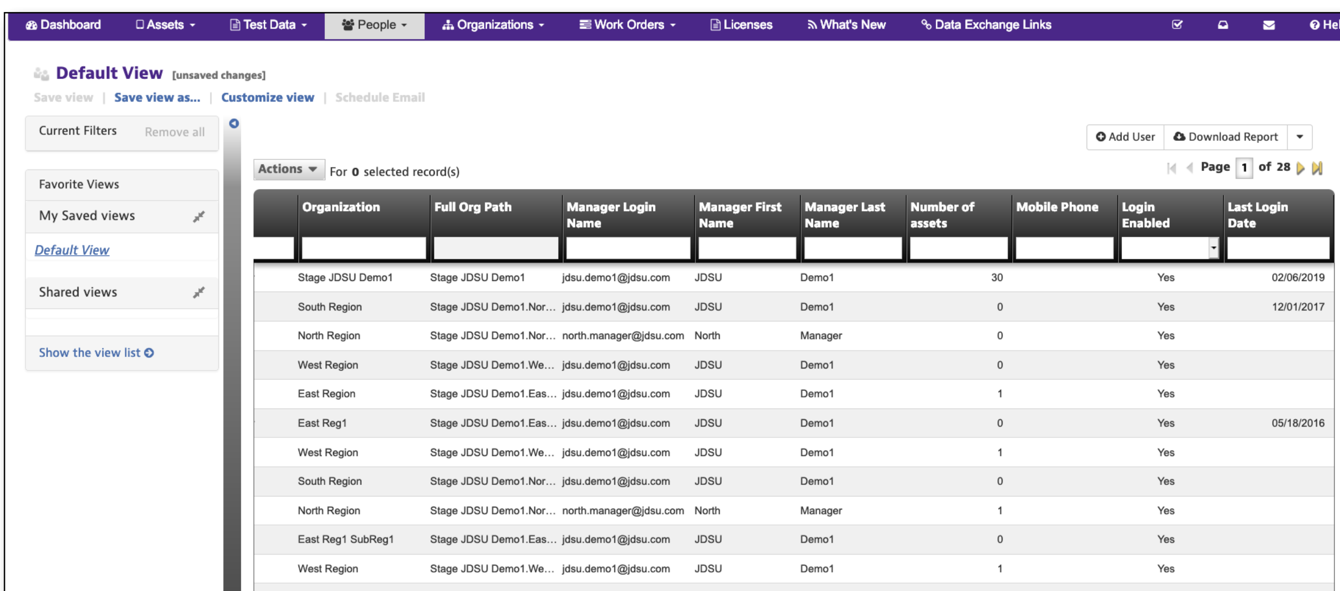
You can search by typing into the search bar under a column header. The list updates with the results.

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




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



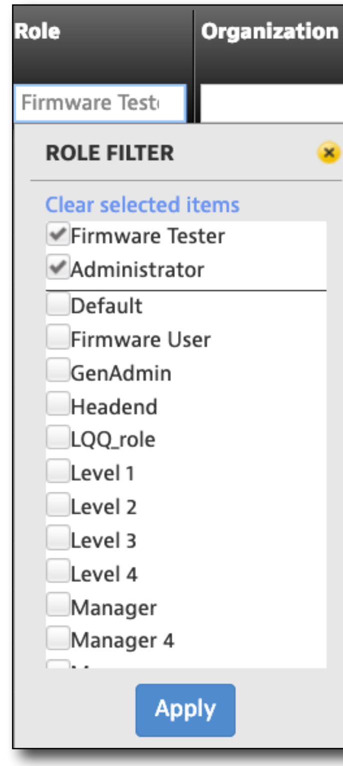




**Scroll to the right to reveal more detail, including Manager's Name and Last Login Date.**

### *Filtering multiple items*

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

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



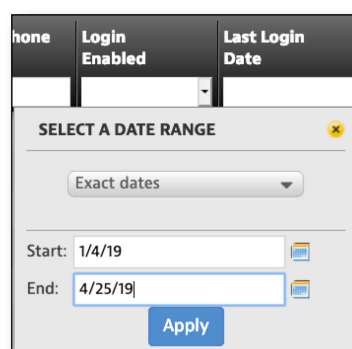

***NOTE:***

***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.

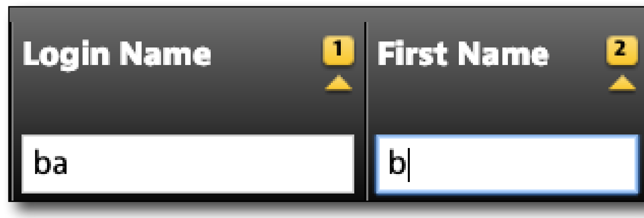


***NOTE:***

***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.



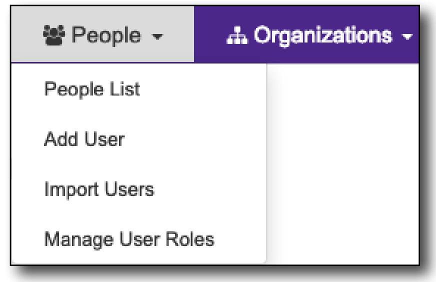

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

# Views

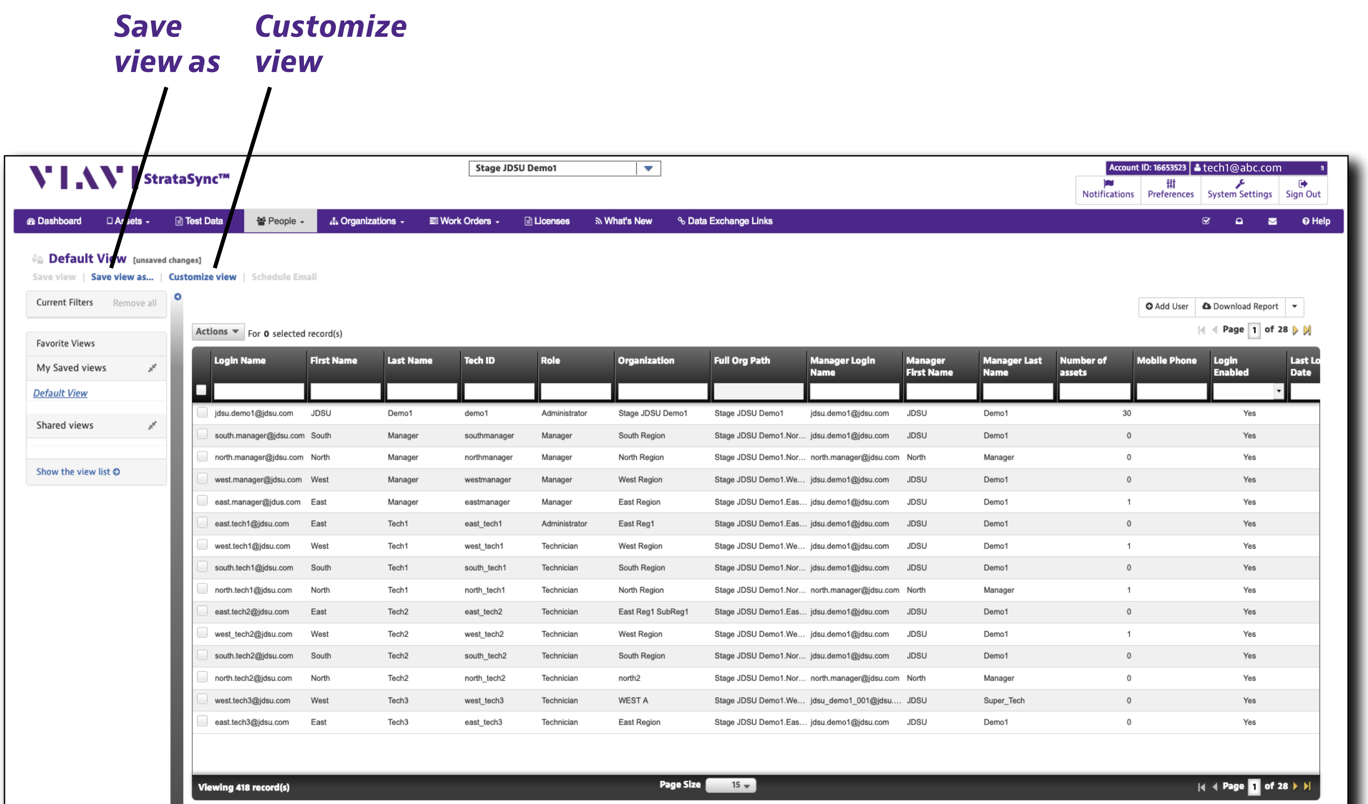
## Customizing views

StrataSync gives you the ability to customize your list views.

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

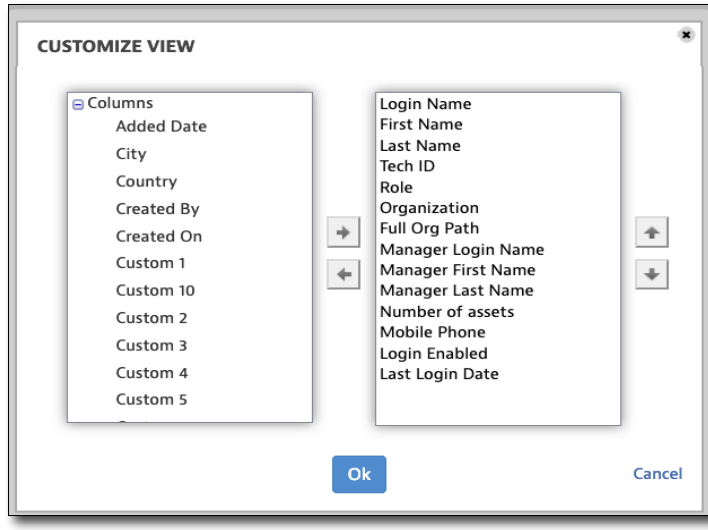



2. Select **Customize view** at the upper left of the screen. The Customize View screens appears.




**People List Default View**

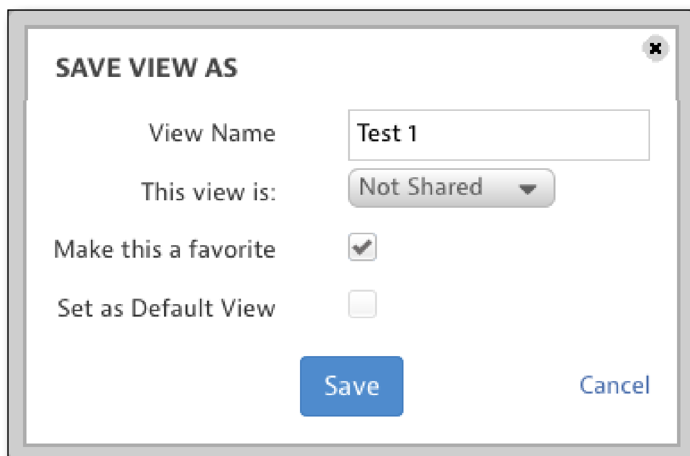
3. In the left column, you will see the items to include in your view. The right column shows the attributes already included in the view list.
4. Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
5. When done, click **OK**.




## Saving views

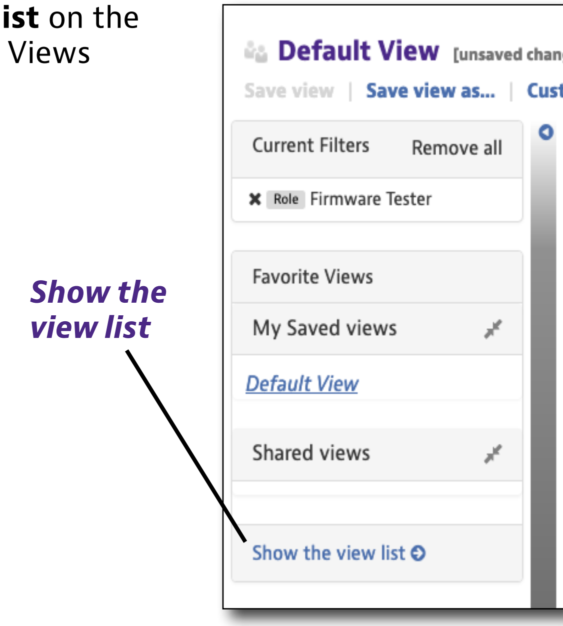
1. From the People List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
2. Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
3. When done, click **Save**.

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

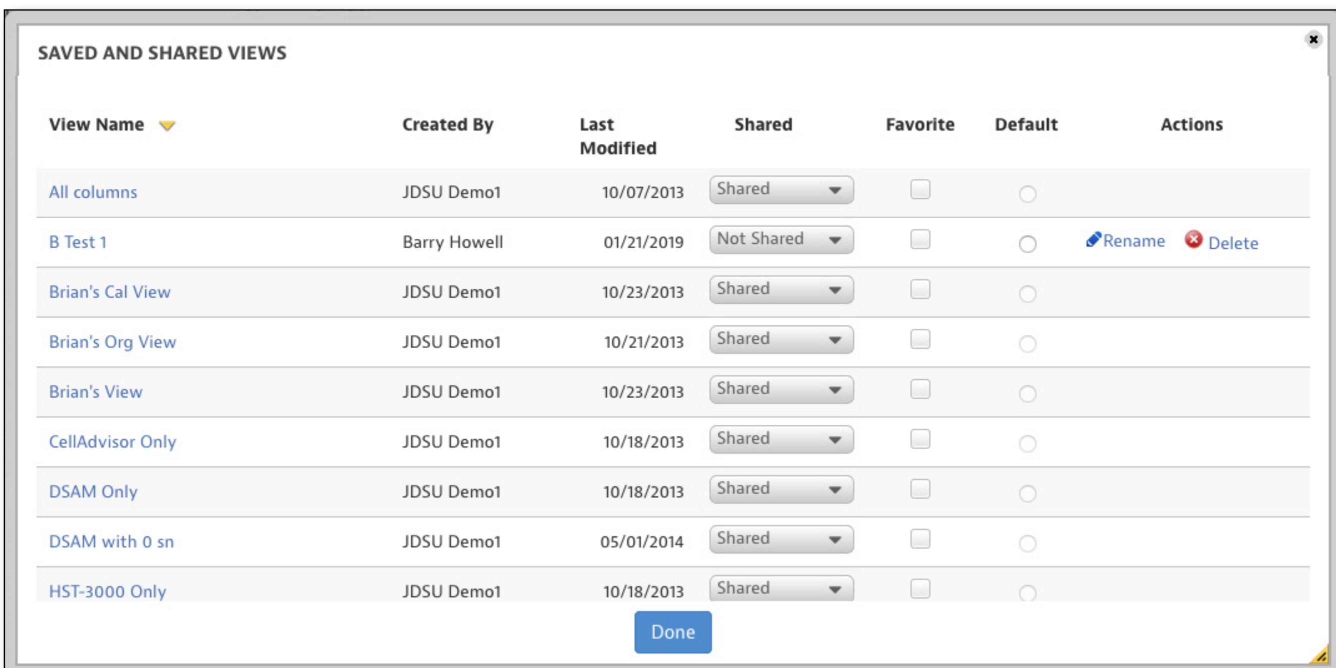


## Sharing and editing views

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




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

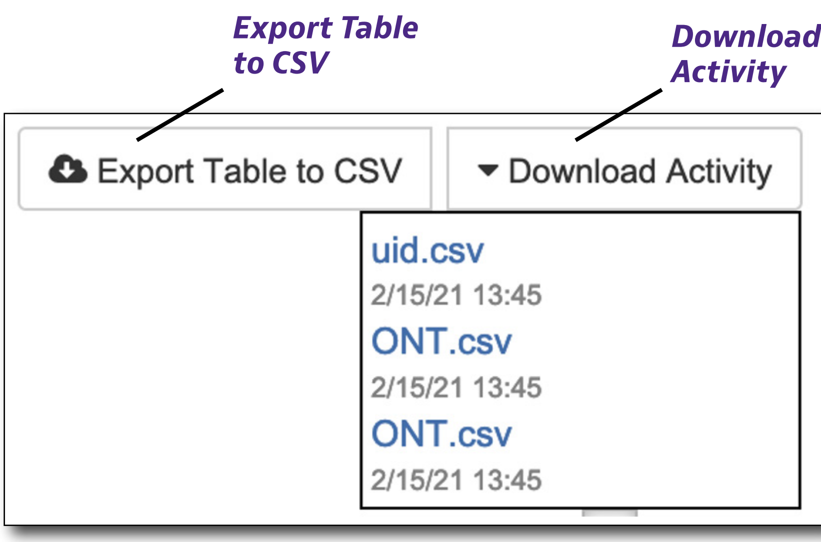
## Exporting lists to CSV

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.

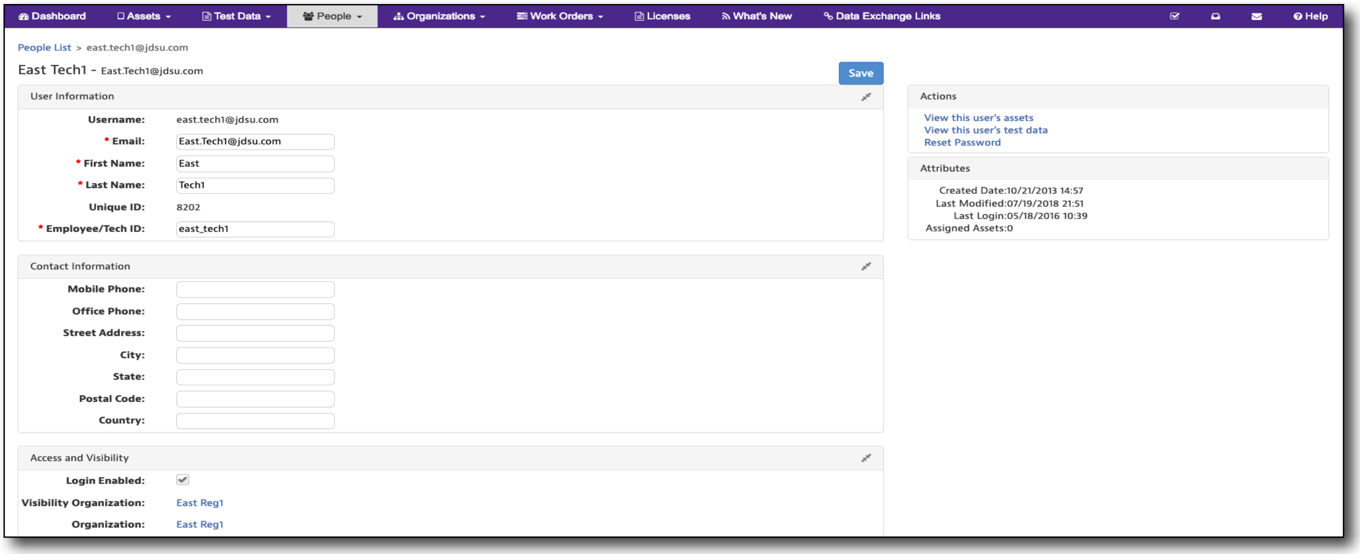



*Exporting data to CSV*

## 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.

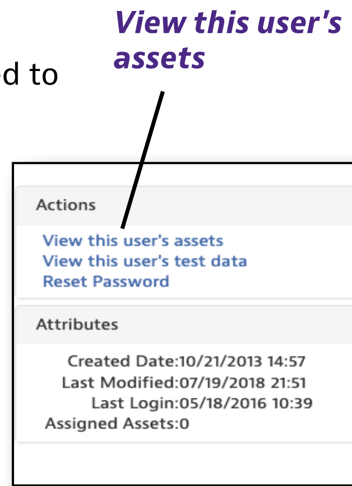
   You can change any of the information except the username.

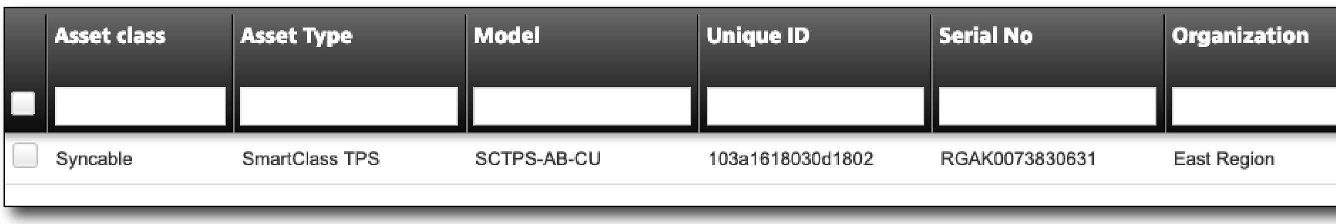


### *View this user's assets*

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.



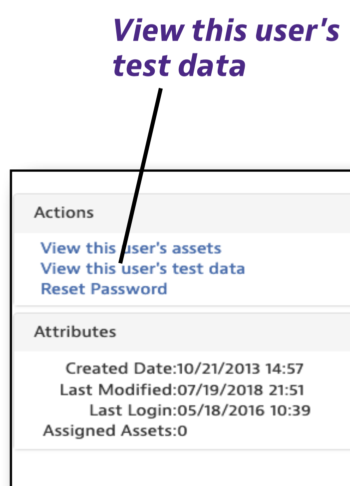



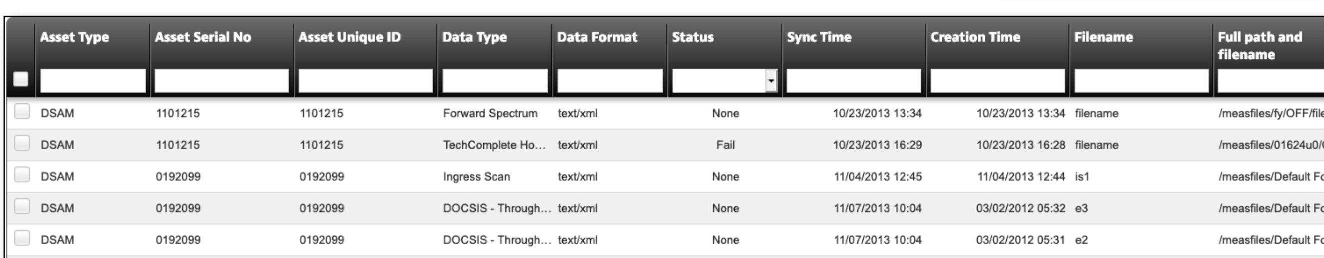
| Asset class | Asset Type | Model | Unique ID | Serial No | Organization |
|---|---|---|---|---|---|
| Syncable | SmartClass TPS | SCTPS-AB-CU | 103a1618030d1802 | RGAK0073830631 | East Region |

### *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.



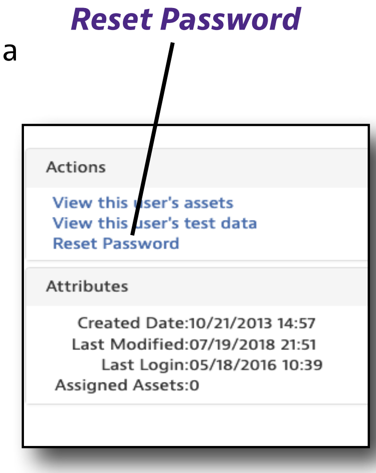



| Asset Type | Asset Serial No | Asset Unique ID | Data Type | Data Format | Status | Sync Time | Creation Time | Filename | Full path and filename |
|---|---|---|---|---|---|---|---|---|---|
| DSAM | 1101215 | 1101215 | Forward Spectrum | text/xml | None | 10/23/2013 13:34 | 10/23/2013 13:34 | filename | /measfiles/fy/OFF/filer |
| DSAM | 1101215 | 1101215 | TechComplete Ho… | text/xml | Fail | 10/23/2013 16:29 | 10/23/2013 16:28 | filename | /measfiles/01624u0/C |
| DSAM | 0192099 | 0192099 | Ingress Scan | text/xml | None | 11/04/2013 12:45 | 11/04/2013 12:44 | is1 | /measfiles/Default Fol |
| DSAM | 0192099 | 0192099 | DOCSIS - Through… | text/xml | None | 11/07/2013 10:04 | 03/02/2012 05:32 | e3 | /measfiles/Default Fol |
| DSAM | 0192099 | 0192099 | DOCSIS - Through… | text/xml | None | 11/07/2013 10:04 | 03/02/2012 05:31 | e2 | /measfiles/Default Fol |

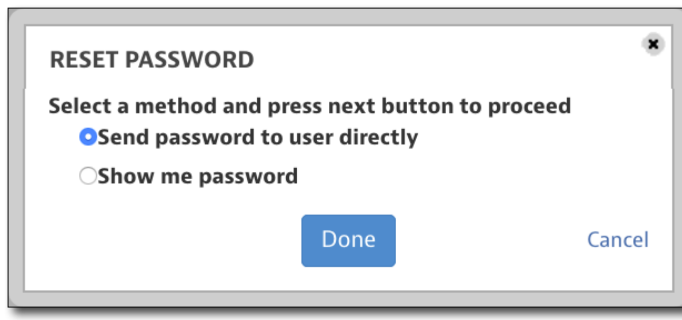
### *Reset password*

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.



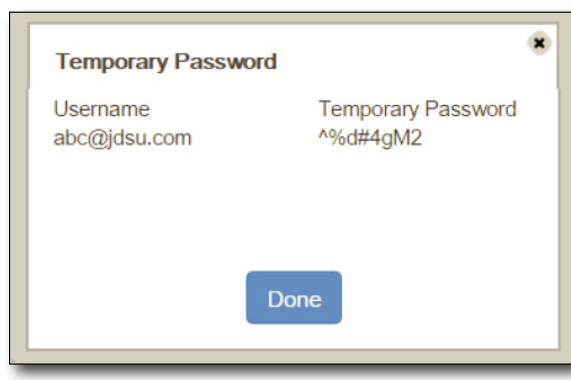

From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.




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

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

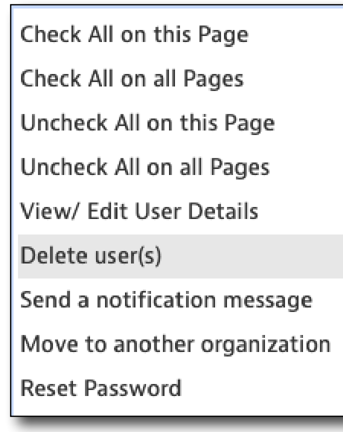
You can also change your password through Preferences. See *"Configuration" on page 271*

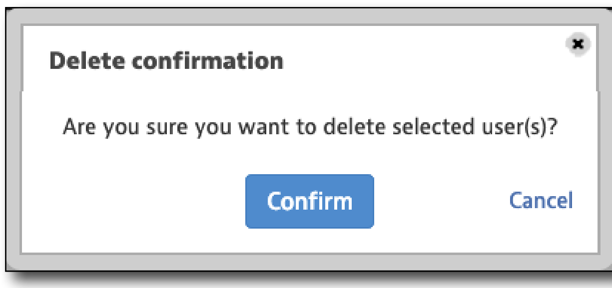



**Note:** If you need help changing your password, contact your StrataSync administrator.

## 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.**



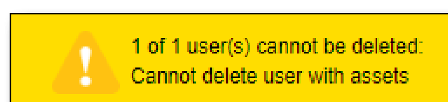

***NOTE:***

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

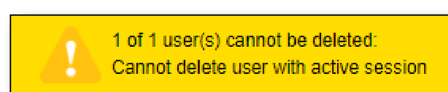
**StrataSync will not delete users under the following conditions:**

- 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.

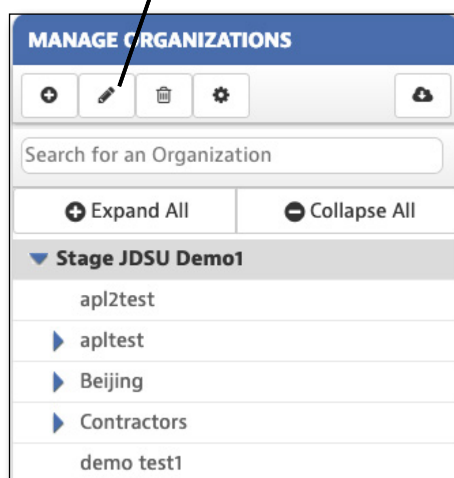
| Login Name | First Name | Last Name | Tech ID | Role | Organization | Full Org Path | Manager Login Name |
|---|---|---|---|---|---|---|---|
| | | | | | | | earl.pope@stagedemo.com |
| bud.pope@stagedemo.c... | Earl | Pope | bp001 | Firmware User | Earl Test | Stage JDSU Demo1.Earl... | earl.pope@stagedemo.com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

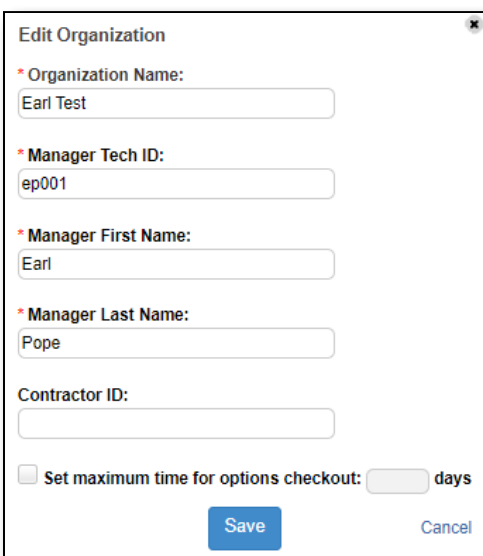
From the Organizations tab, select the appropriate Organization(s) in the Manage Organizations tab. Then click **Edit Organization** and edit the Organization Manager to another appropriate StrataSync user.

When done, click **Save**.

See *"Editing roles" on page 206* for more detail.

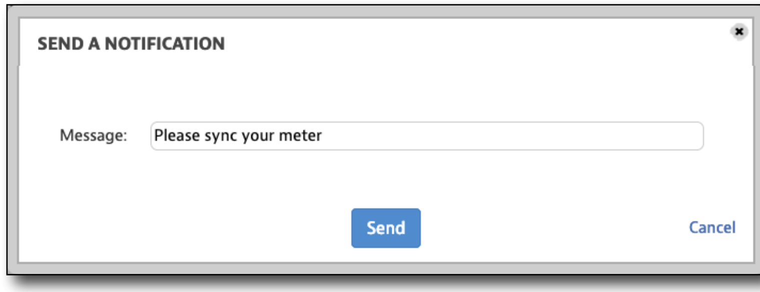
***Edit Organization***



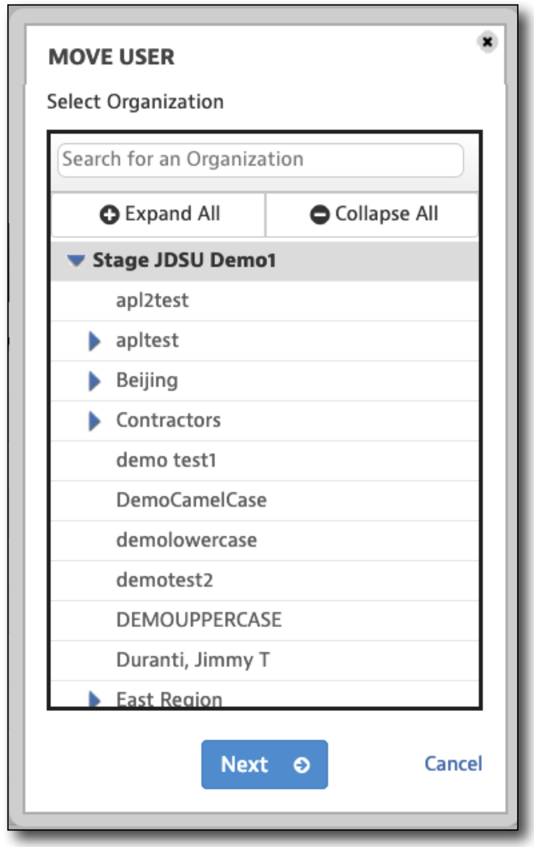



## Sending a notification to a user

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

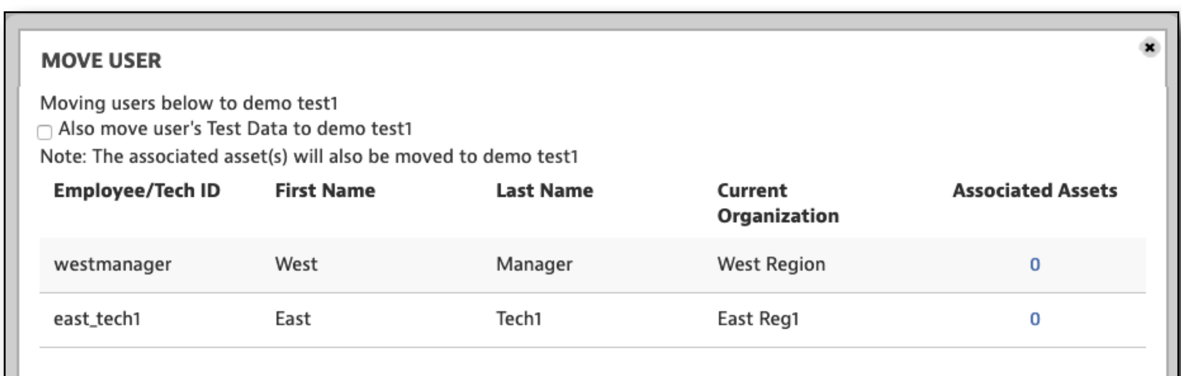



1. From the People List, select the checkbox next to the user (or users) you want to move.
2. Right-click the person (or use the **Action** dropdown) and select ***Move to another organization***. The Move User screen appears.
3. Select the organization or suborg and click **Next**.
4. A confirmation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



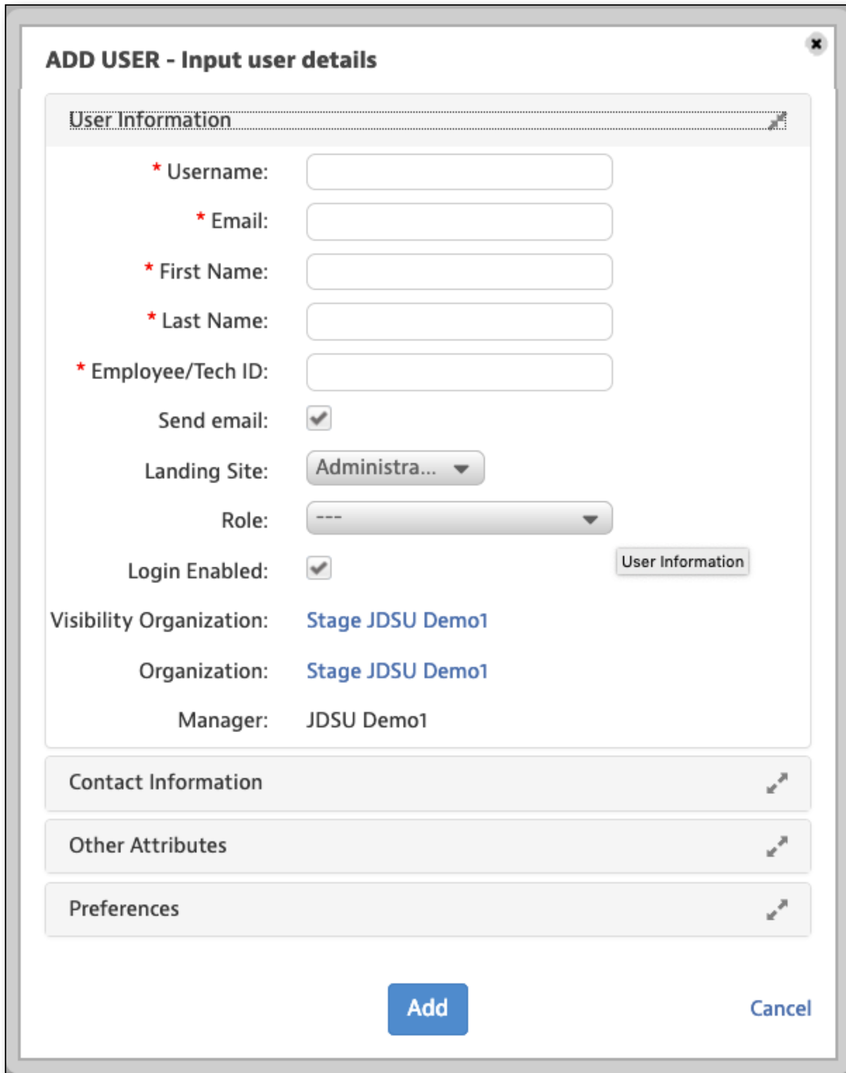

## Resetting passwords

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.

- 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.

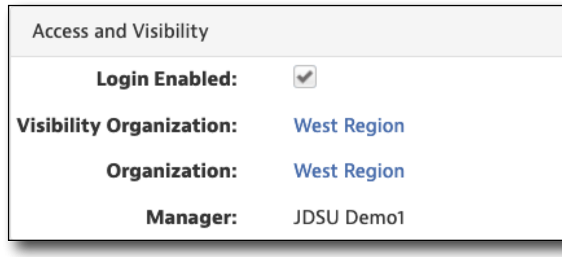
7. Add additional optional contact information, attributes, and preferences in those sections.
8. When done, click **Add**. The new user will appear in the People List.

# 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.

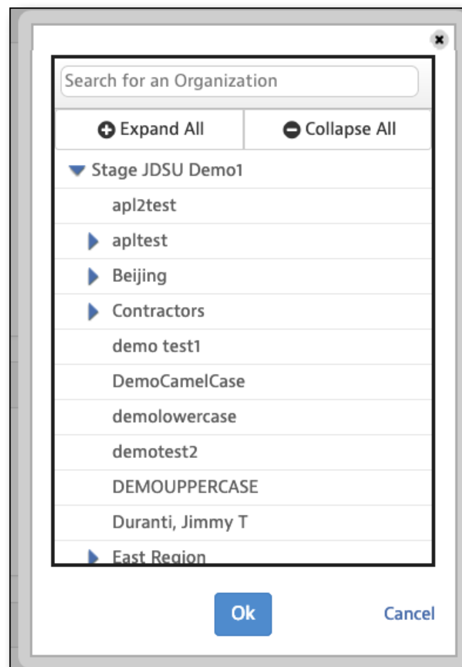



### *Changing the visibility*

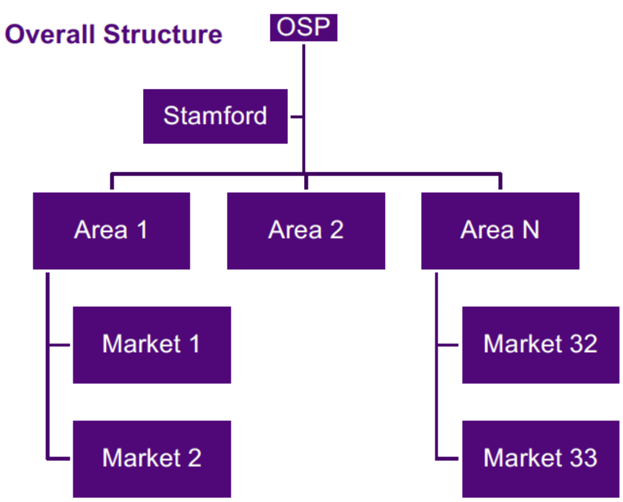
From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.

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 visibilty 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*.

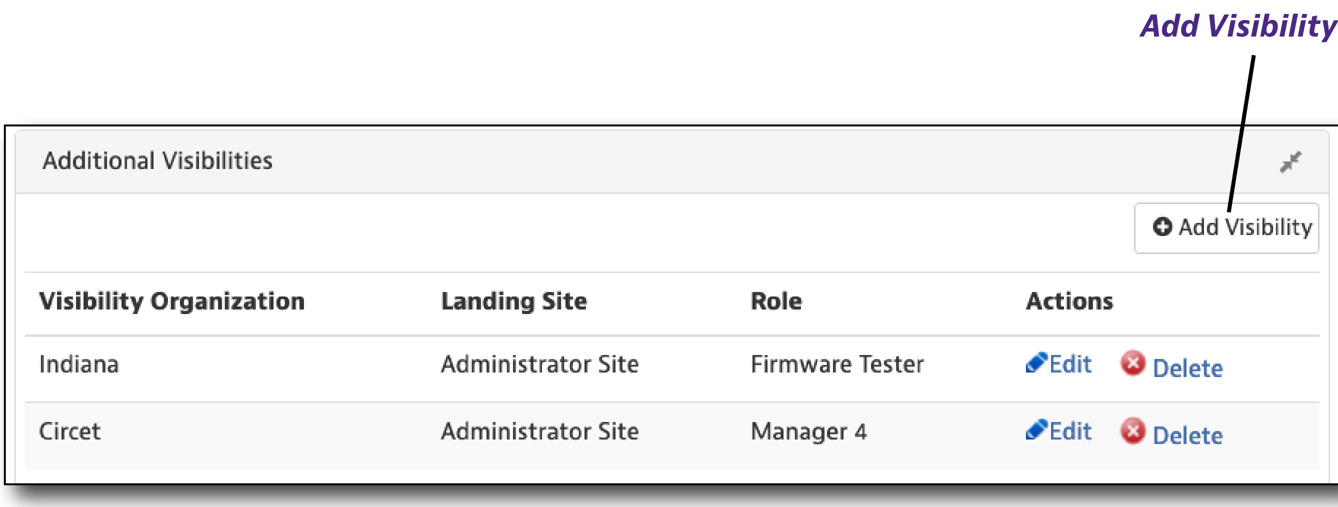
### *Adding additional visibility*

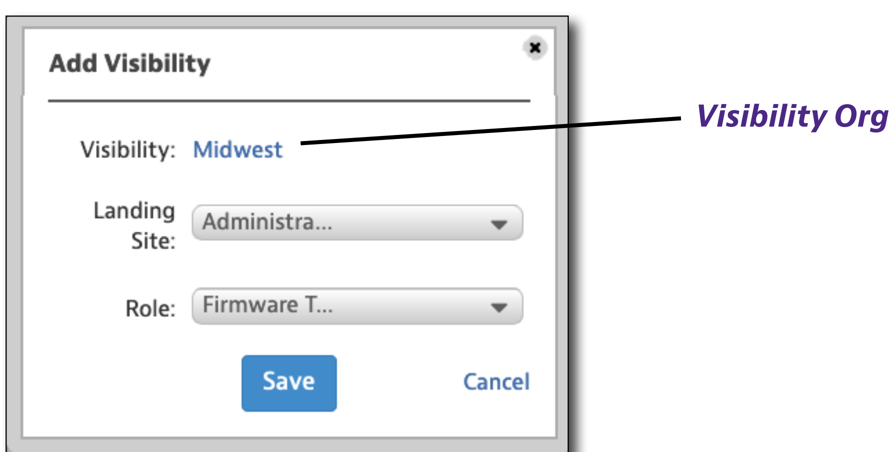
You can give a user additional visability by setting up more organizations, landing sites, or roles for customized access. This is an advanced feature and is not recommended for most situations.

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.

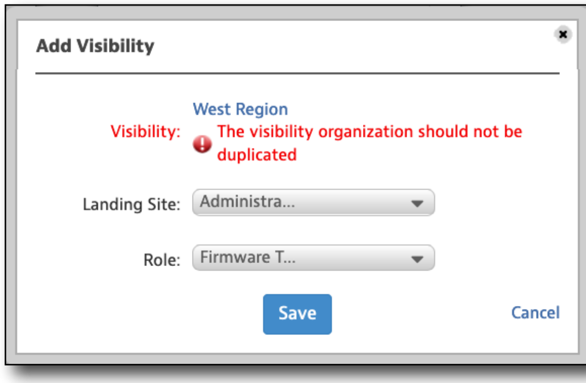
   **Note:** The Landing Site for the user must be set to **Administrator Site** for the **Add Visibility** button to appear.
4. Next to **Visibility**, select a new visibility organization, and use the dropdowns to choose the **Landing Site** and **Role**.
5. When done, click **Save**. Continue to add 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.



**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.

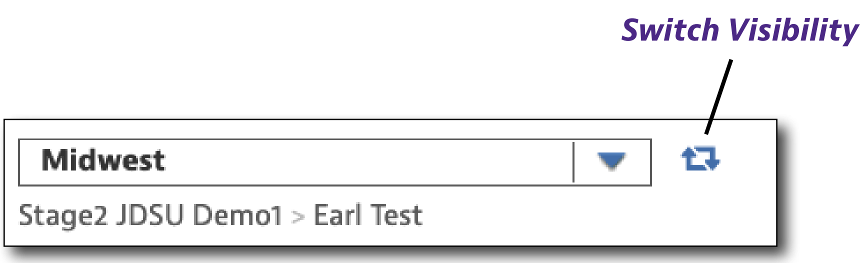


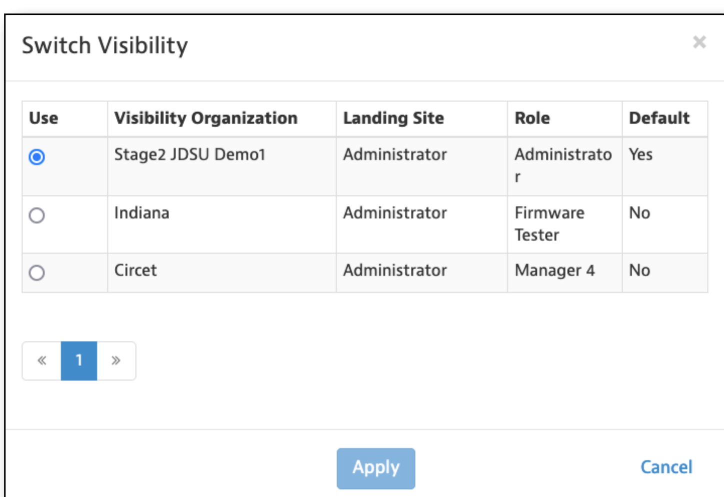

### *Switching visibility organizations*

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.

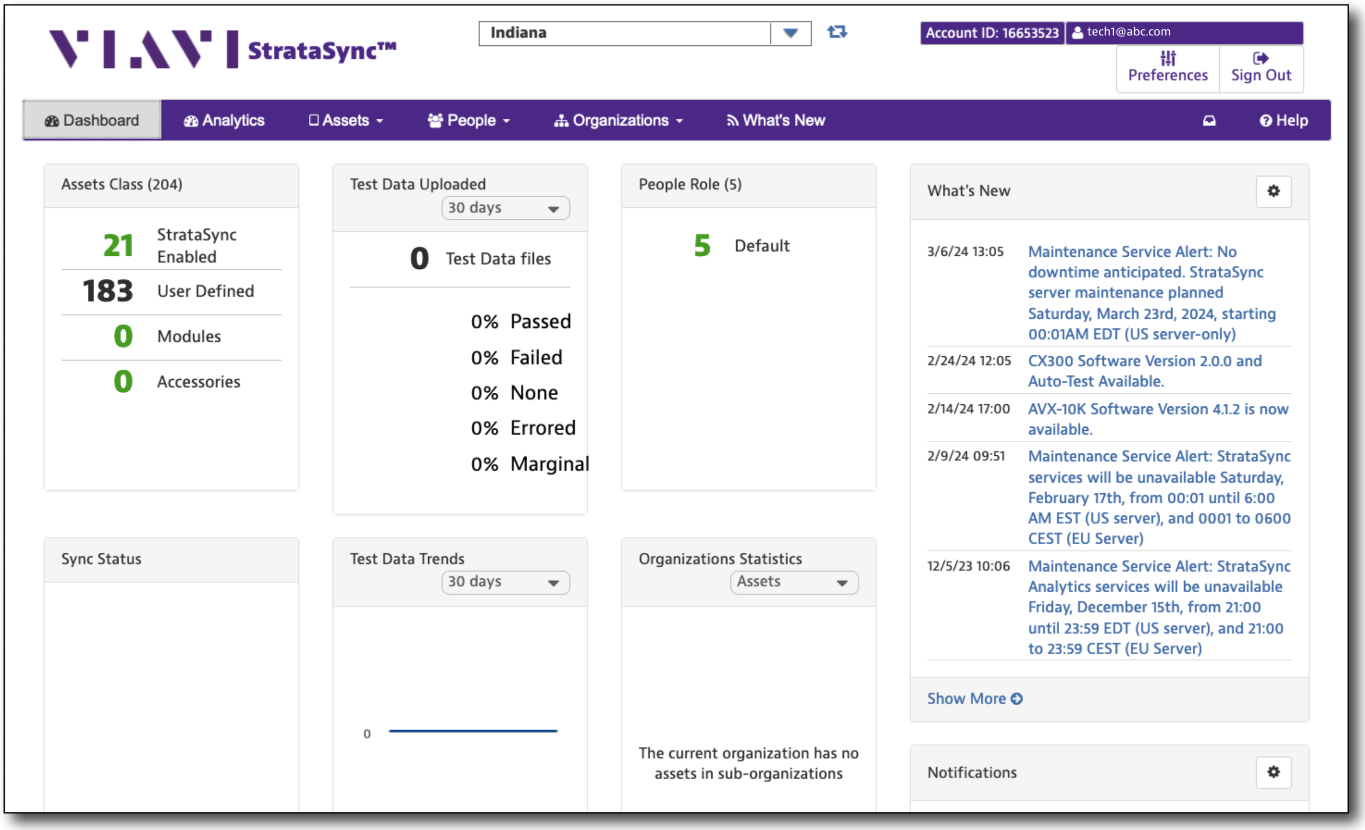
Select **Switch Visibility**. The Switch Visibility screen appears.

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



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**.

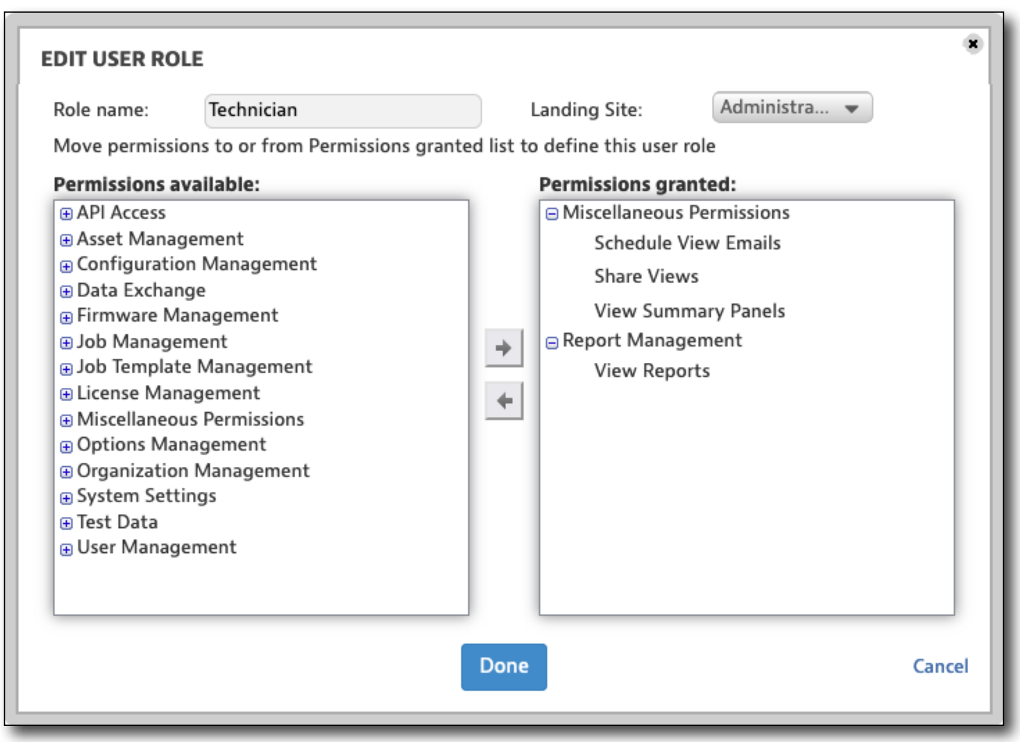
### *Adding additional permissions*

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**.



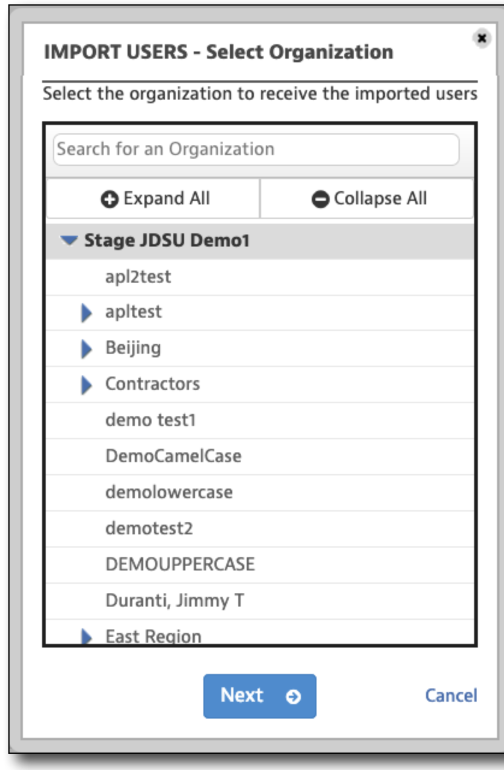
# Importing users

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.

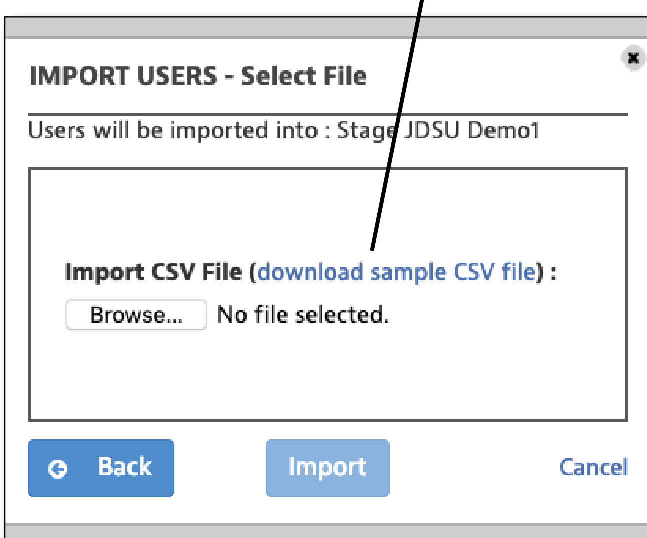



## Importing changes for users

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.

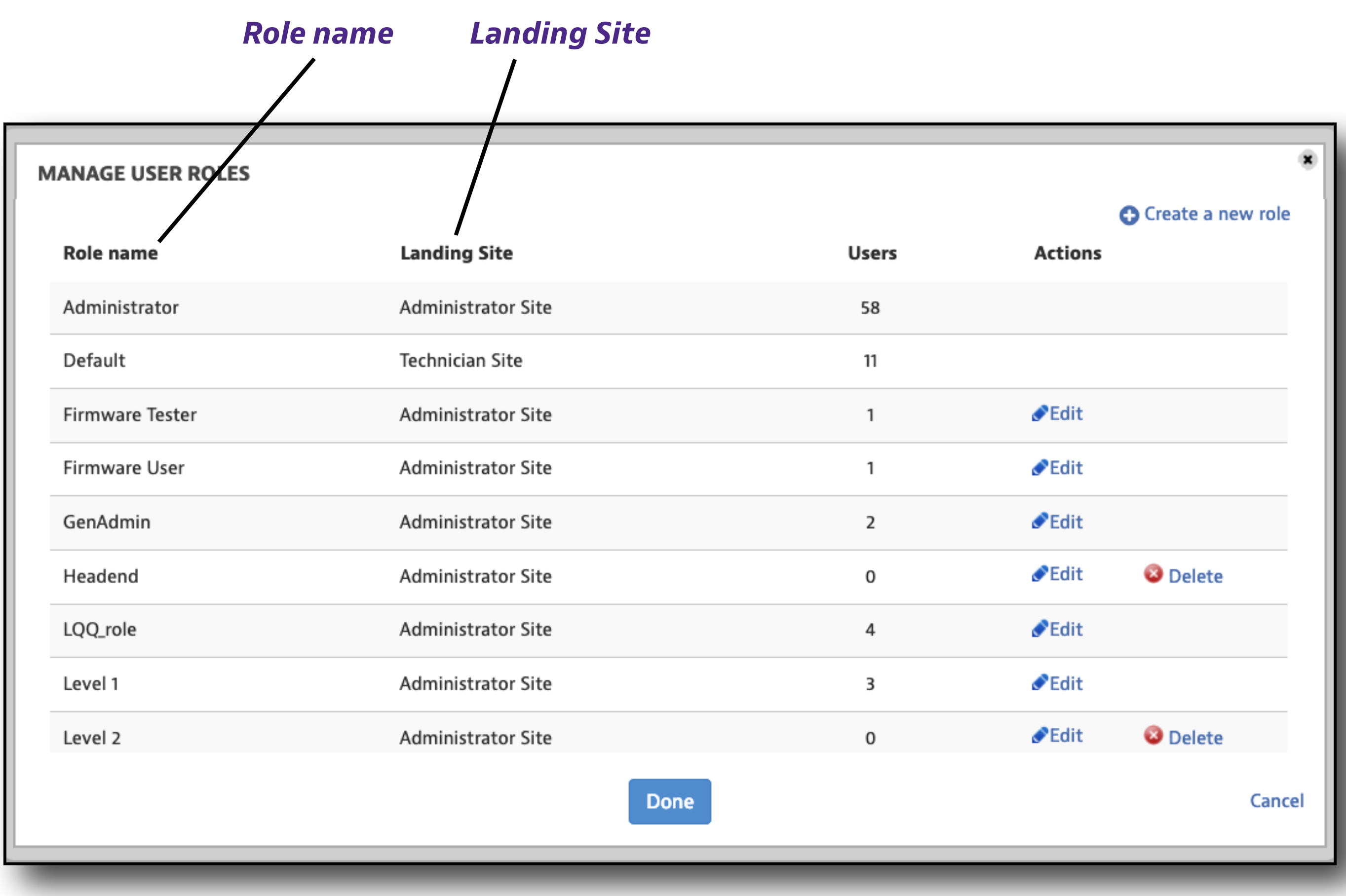
## Roles and Landing Sites

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.

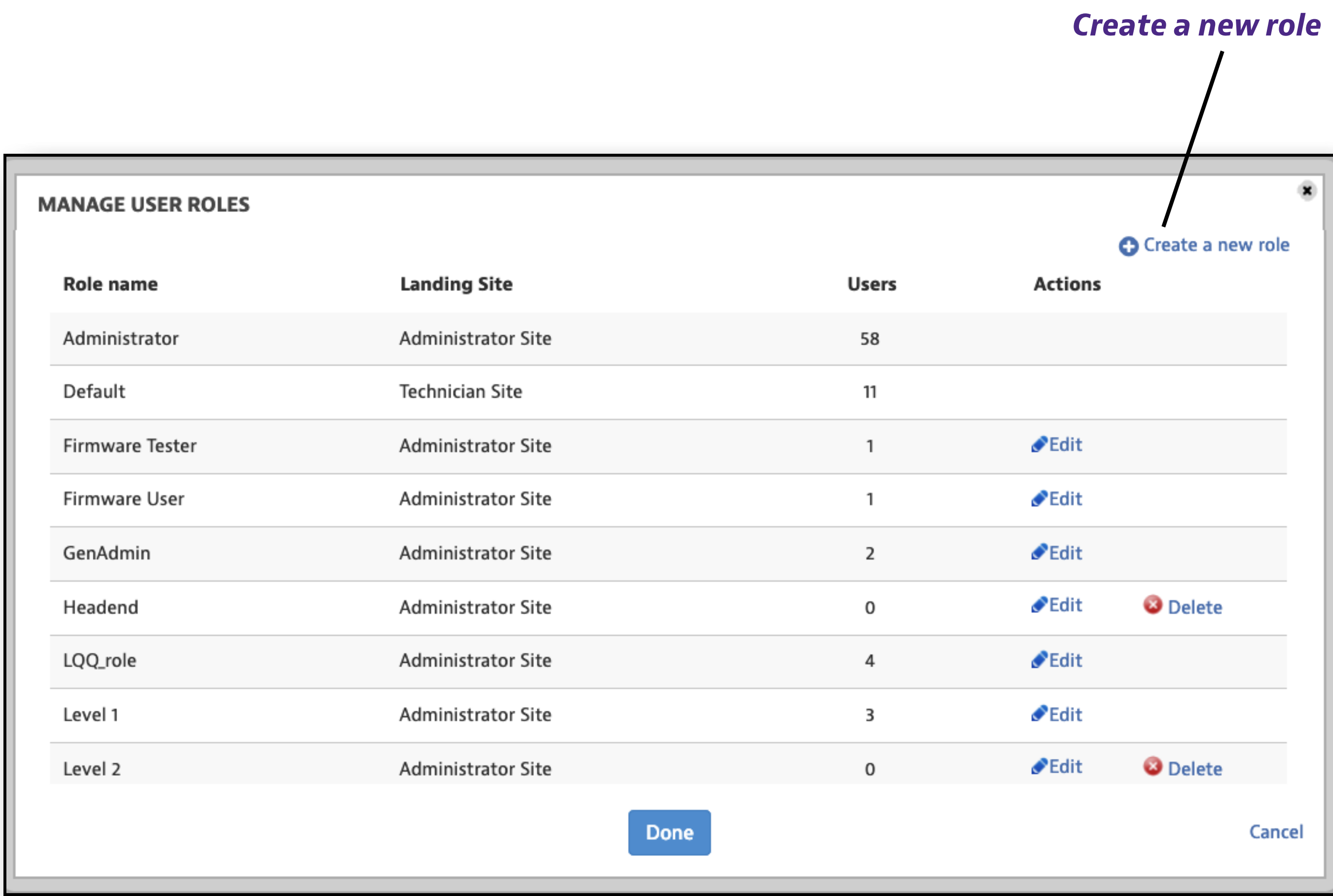
The **Default** role includes the following StrataSync permissions: ***Update Firmware, View Assets, Assign Options, Manage Floating Options***, and ***View Options***.

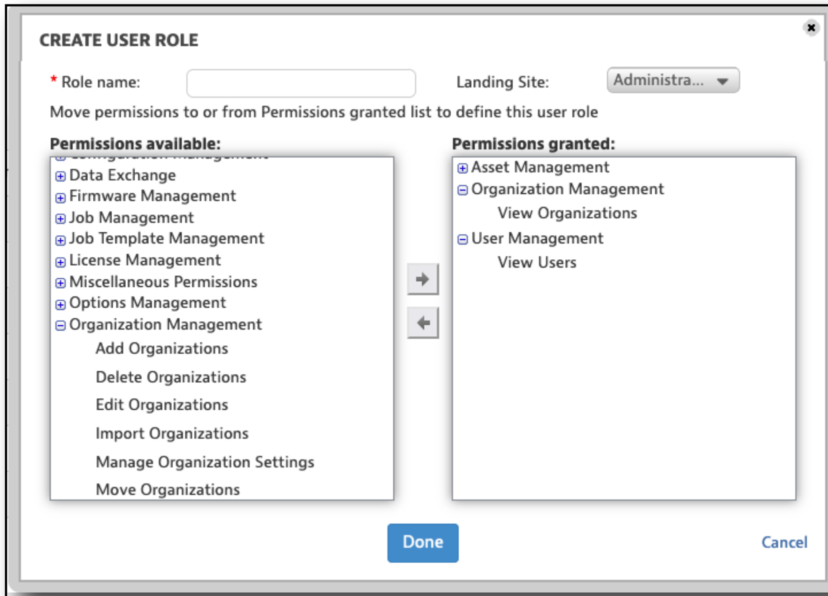
Additional roles should be created as needed to support the needs of various StrataSync users and to strictly limit access to certain StrataSync features, such as System Settings.



## Adding roles

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






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.

***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

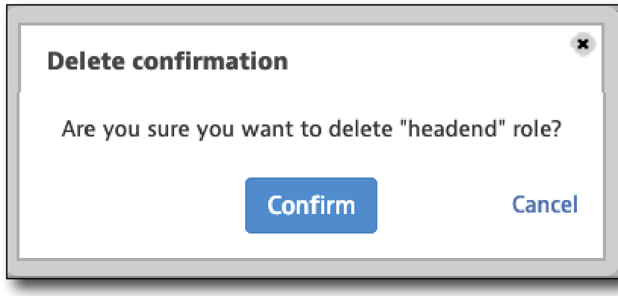
From the Manage User Roles screen, click **Edit** to update user roles.

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.

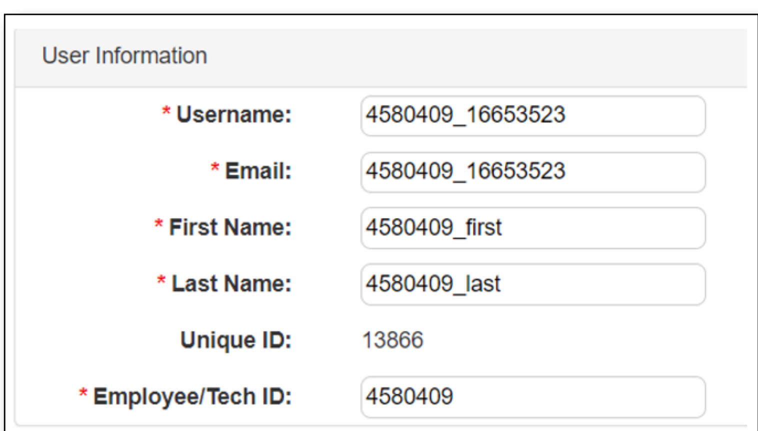
  In this example, an asset was previously synced to a Tech ID. Sometime later, a new Tech ID syncs the asset to StrataSync, and since this ID is unknown, StrataSync creates a user with the Unidentified TechId role for the asset in the same organization.

- 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”



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 |
|---|---|---|---|---|---|
| | | | | | Unidentified TechId |
| | t6d1_16653523 | t6d1_first | t6d1_last | t6d1 | Unidentified TechId |
| | indyeng_16653523_man… | IndyEng_first | IndyEng_last | IndyEng | Unidentified TechId |
| | 4580409_16653523 | 4580409_first | 4580409_last | 4580409 | Unidentified TechId |
| | 58729_16653523 | 58729_first | 58729_last | 58729 | Unidentified TechId |
| | tech5678_16653523 | Tech5678_first | Tech5678_last | tech5678 | Unidentified TechId |
| | 123_16653523 | 123_first | 123_last | 123 | Unidentified TechId |
| | 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 Tempates** – 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)

9

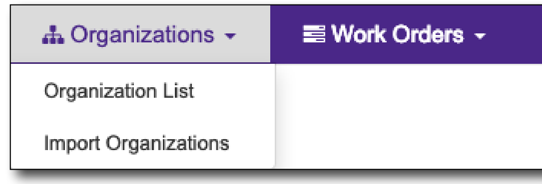
# Organizations

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

# Organizations

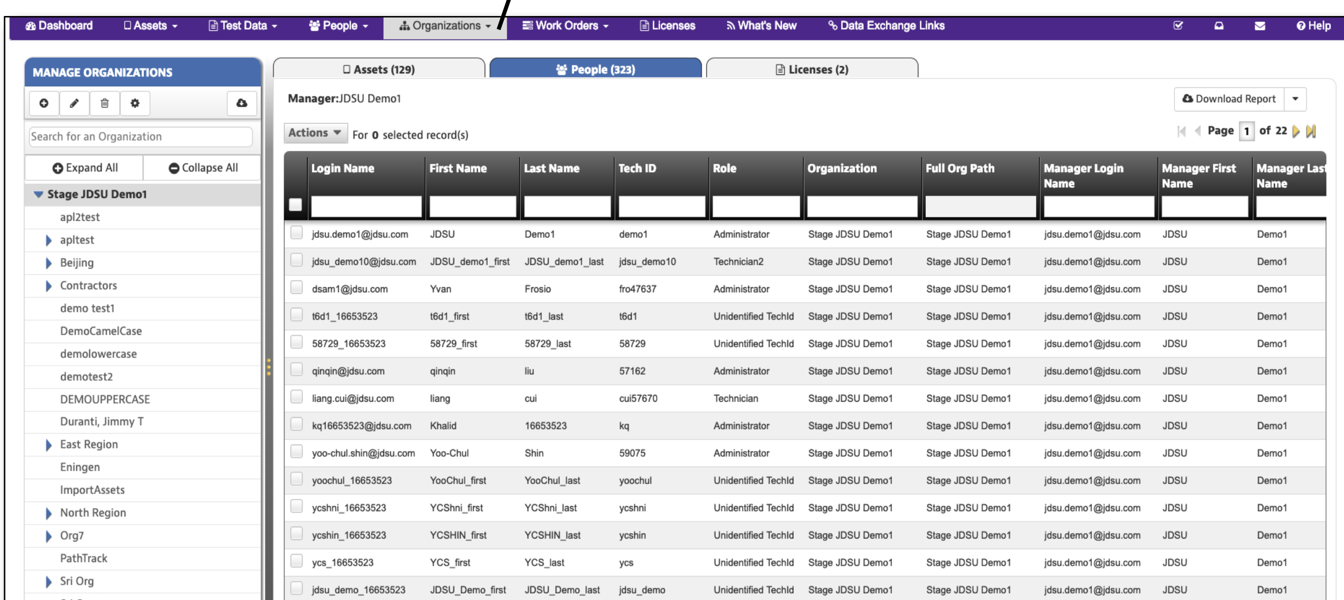
The **Organizations** tab is the hub for all of the organization and suborganization management features of your StrataSync account, including: adding, editing, moving, deleting, and importing organizations.

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

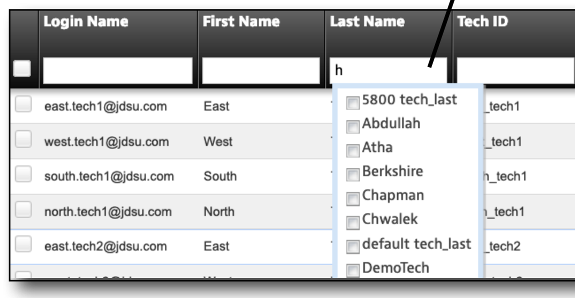
From the Organization List, you can easily find an asset, person, or license using the search bar under each of the column headers or the sorting filters.

## Searching

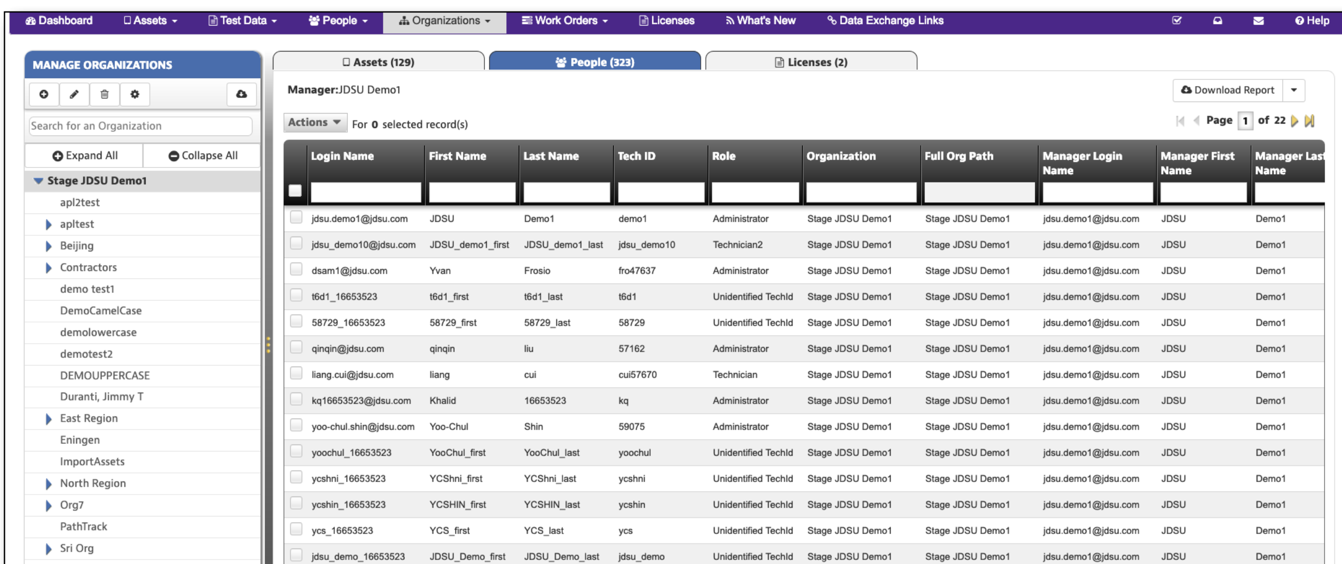
You can search by typing into the search bar under a column header. The list updates with the results.

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

***Search bar***




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.

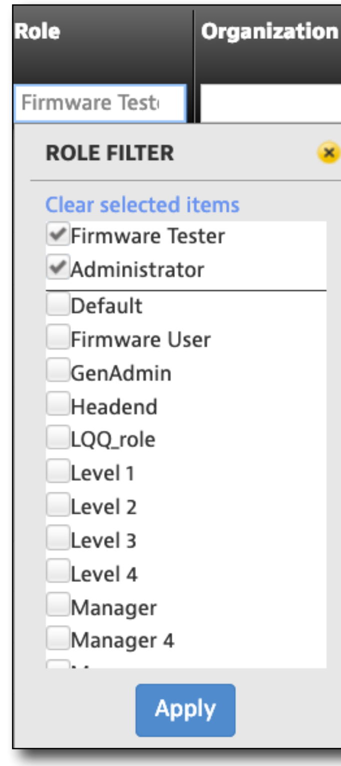



**Scroll to the right to reveal more detail, including Manager's Name and Last Login Date.**

### *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.



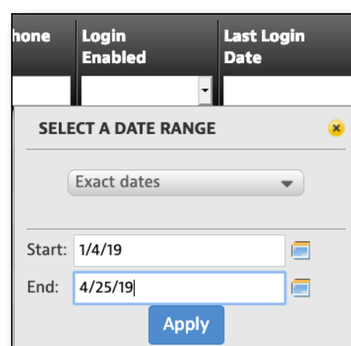

***NOTE:***

***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**.

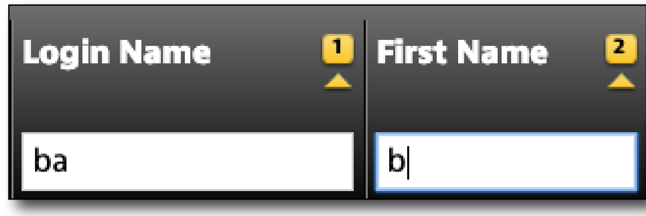
To remove the filter from the search bar, click the (x) to remove the filter.



## 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.

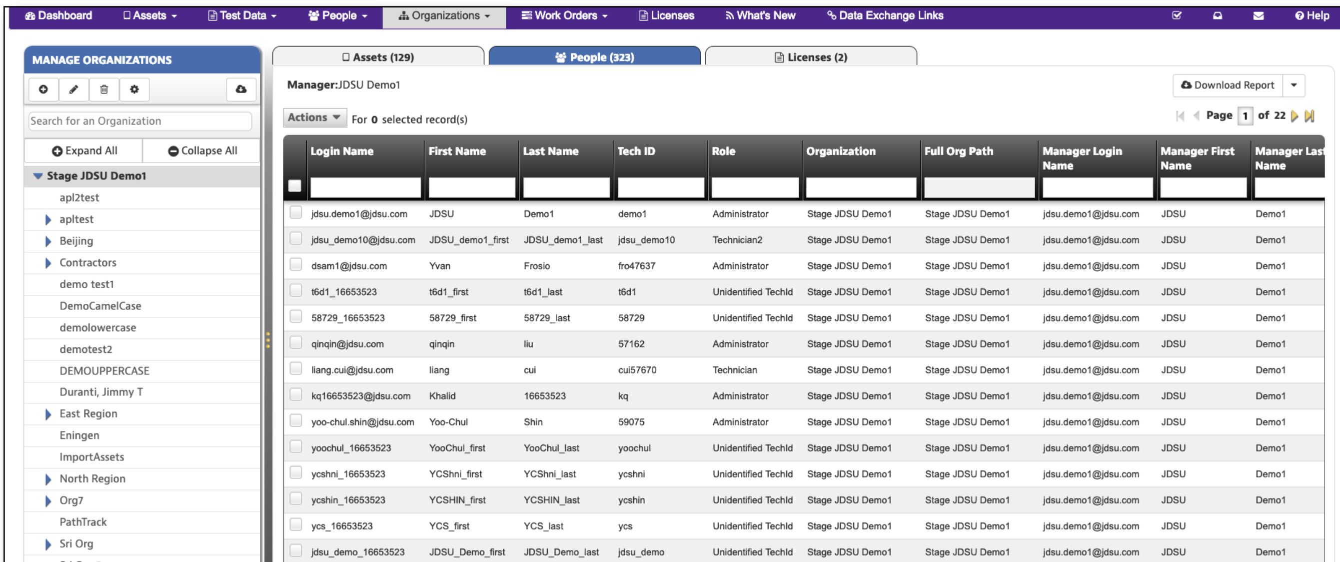


# Organization List

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

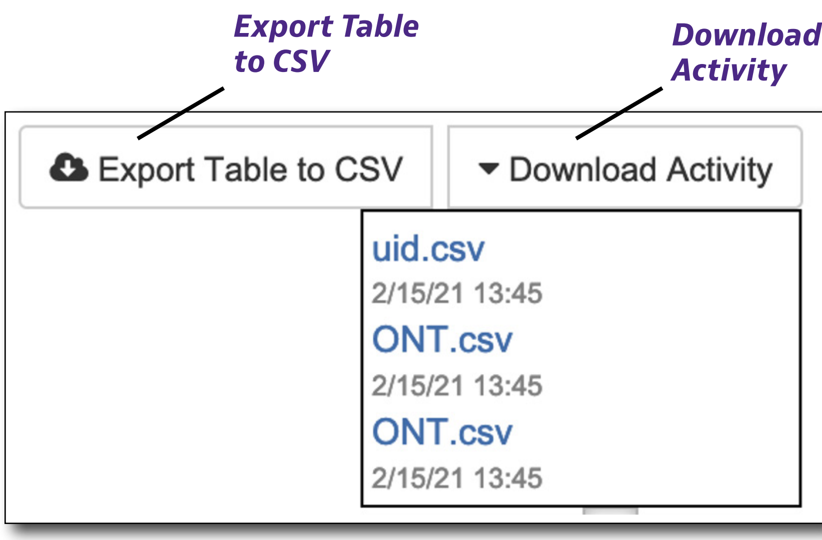
## Exporting lists to CSV

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

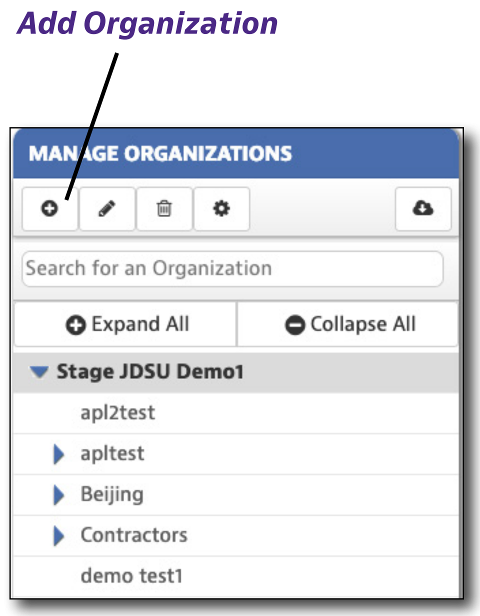
### *Adding organizations*

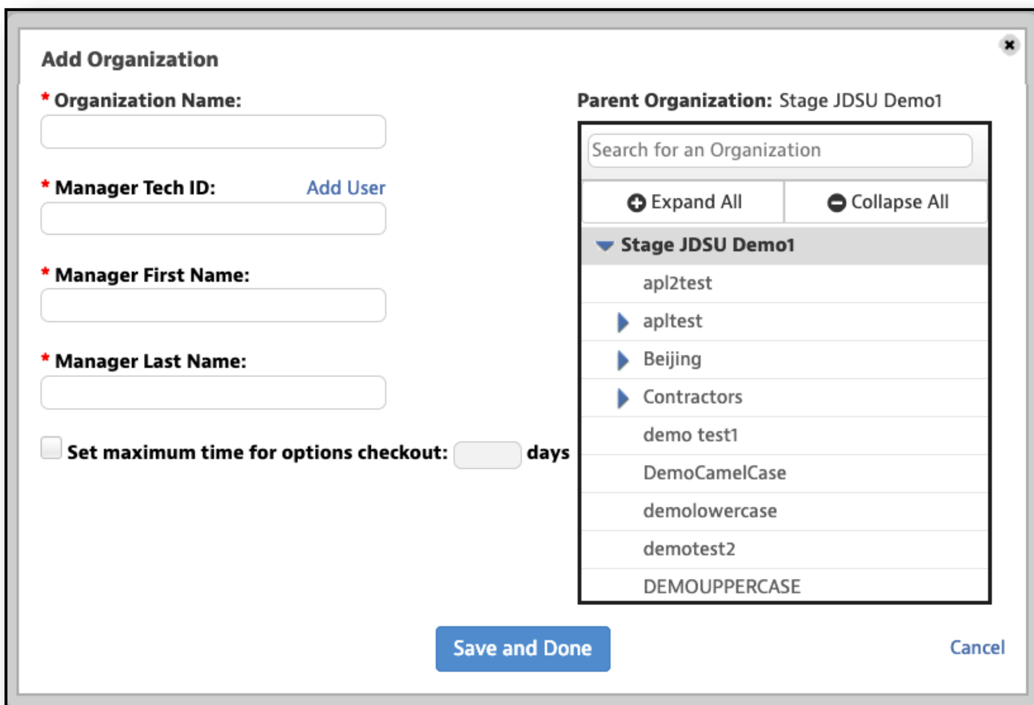
From the Organization List screen, select the **Add** button at the top of the **Manage Organizations** tab. The Add Organization screen is displayed.

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.

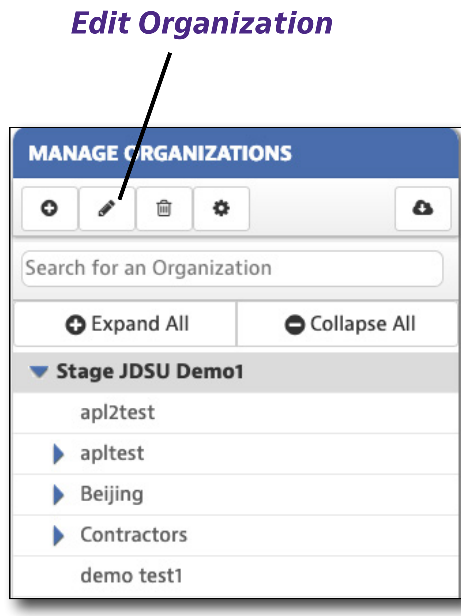


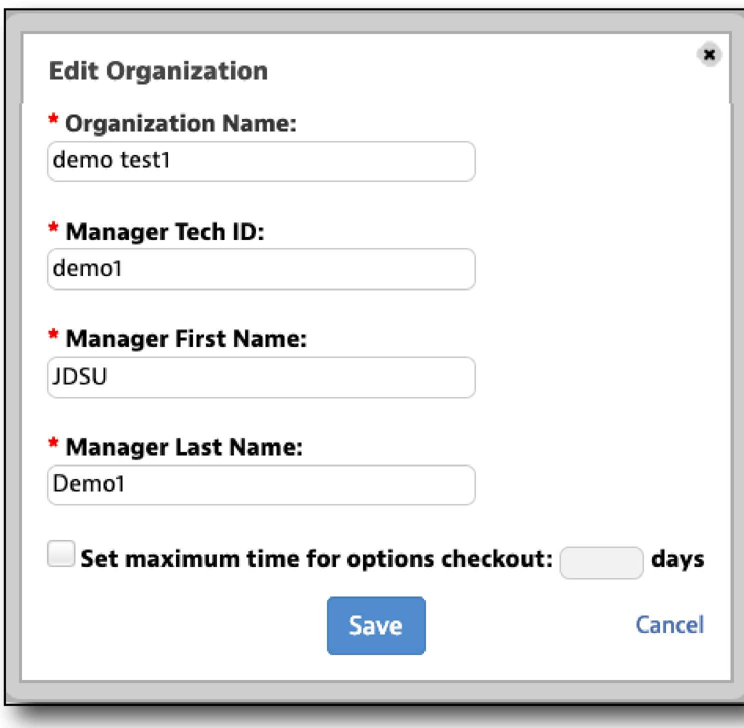



### *Editing organizations*

From the Organization List screen, select the organization you want to edit under the **Manage Organizations** tab, the select the **Edit** button at the top. The Edit Organization screen is displayed.

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



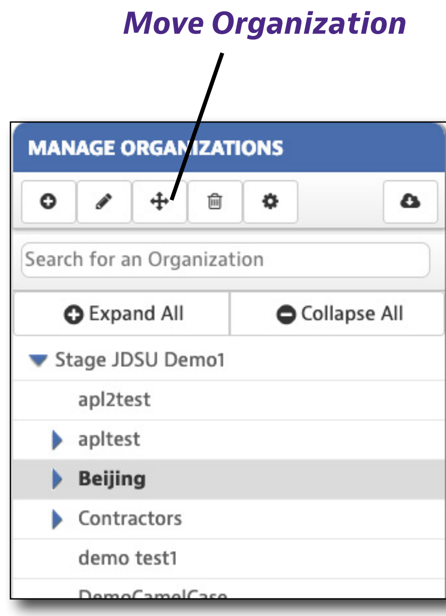



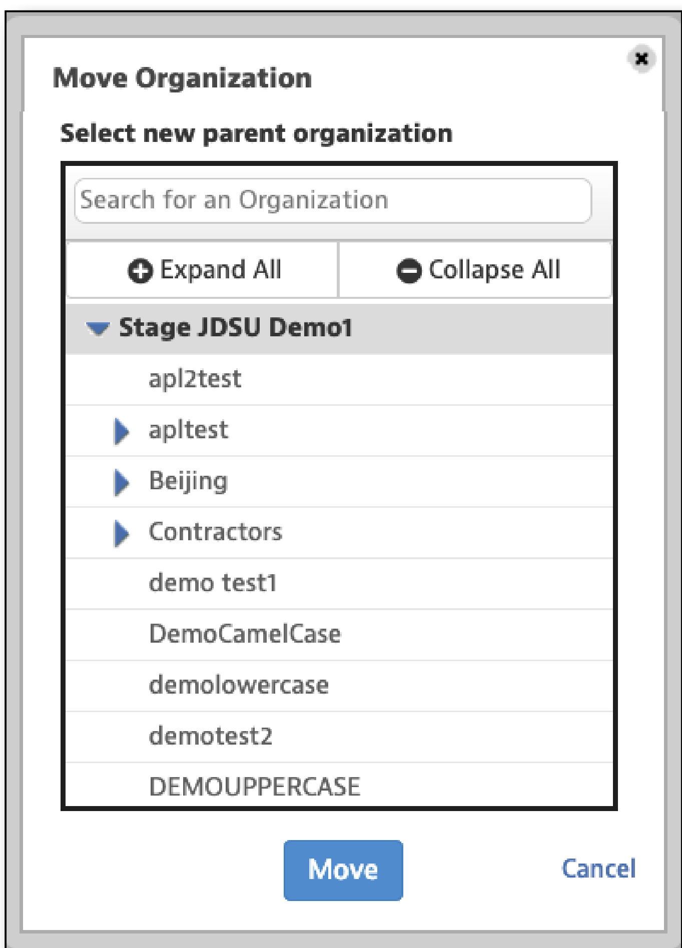
### *Moving organizations*

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, the select the **Move** button at the top. The Move Organization screen is displayed.

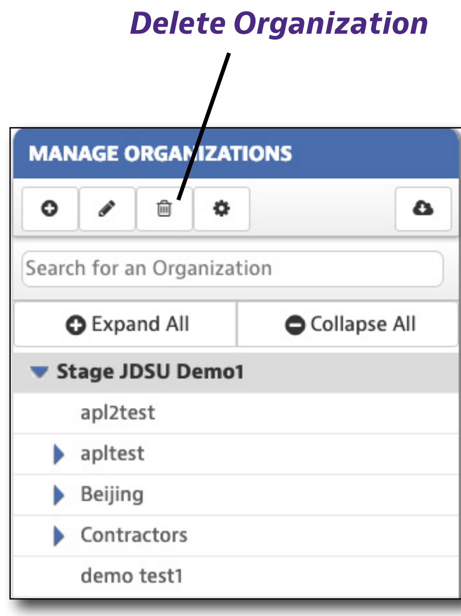
Select the parent organization you want to move it to and click **Move**.



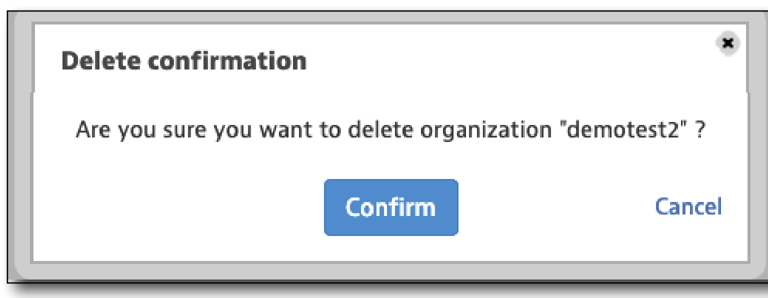



### *Deleting organizations*

From the Organization List screen, select the organization you want to delete under the **Manage Organizations** tab, the select the **Delete** button at the top.




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.***

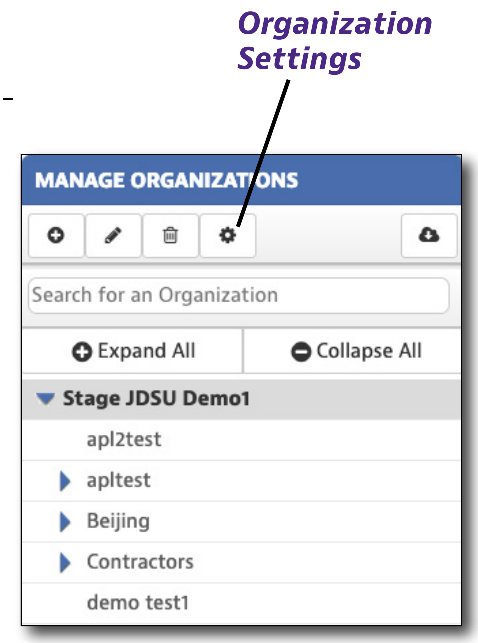
### *Organization settings*

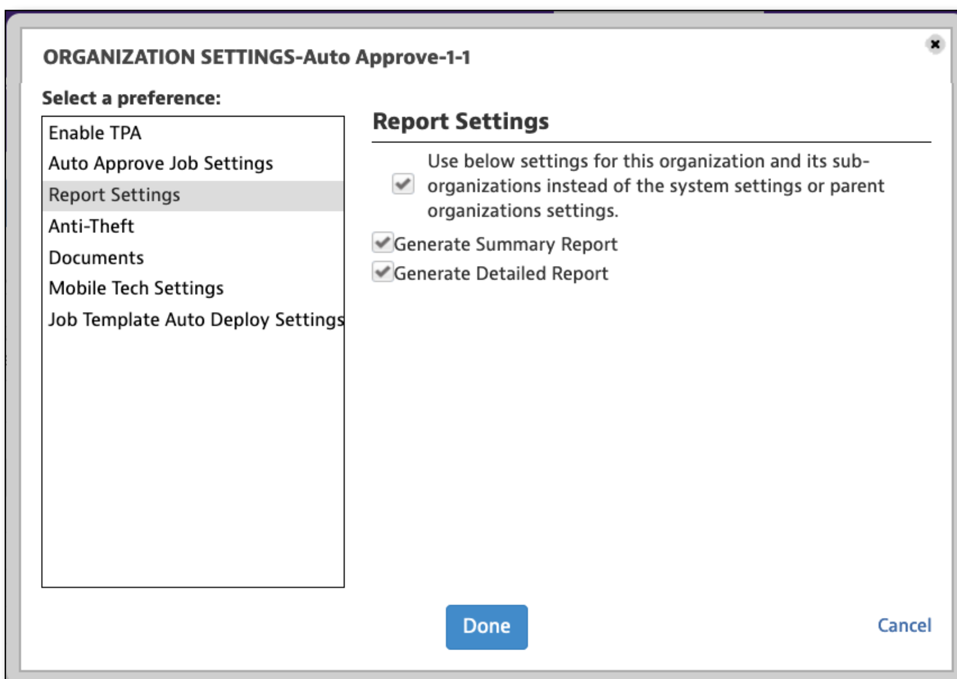
This feature allows you to customize your settings for Test Process Automation, reports, job auto approve, anti-theft, documents, template auto deploy, Mobile Tech, and job template auto deploy.

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**.

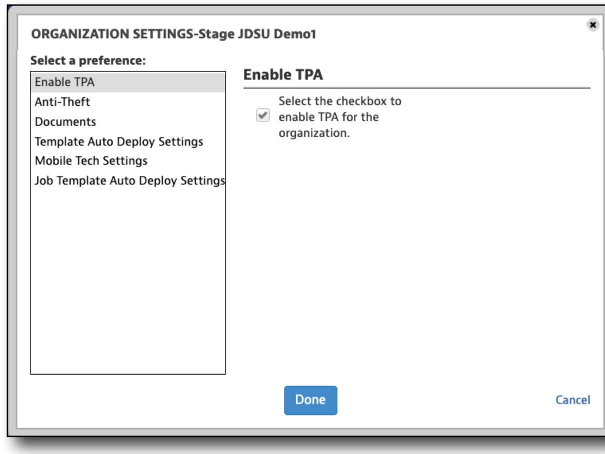



***IMPORTANT:***

***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)*



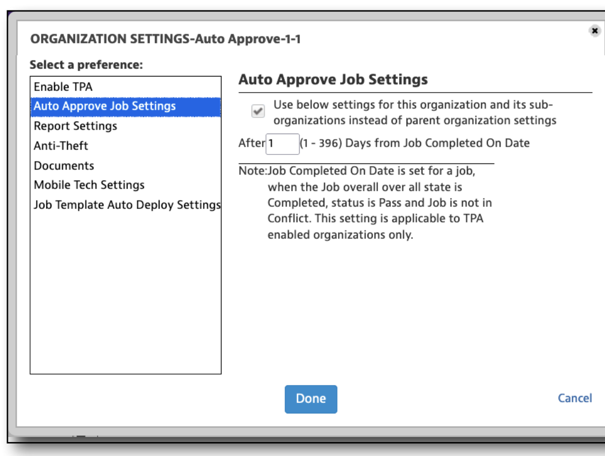

This feature allows you to set Test Process Automation at the organization level to enable TPA at that org (and any orgs underneath it in the hierarchy).

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.

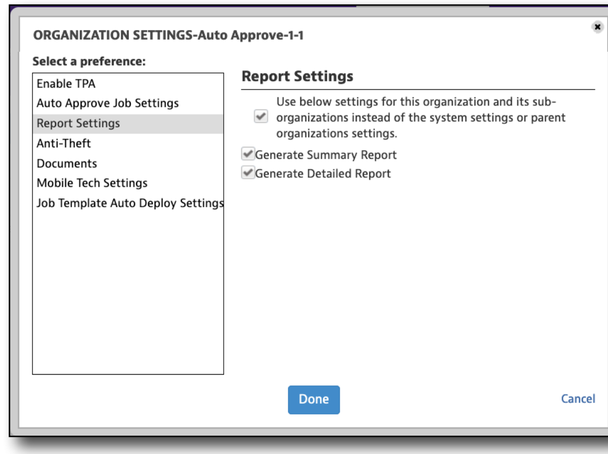
Please note that the StrataSync account must be licensed for SS-PRO or higher.

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**.

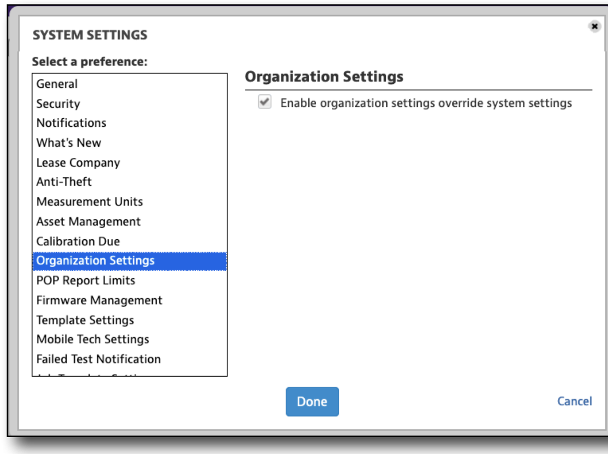
For system-wide settings, see *"Report settings" on page 295.*

### *Mobile Tech settings and custom documents*

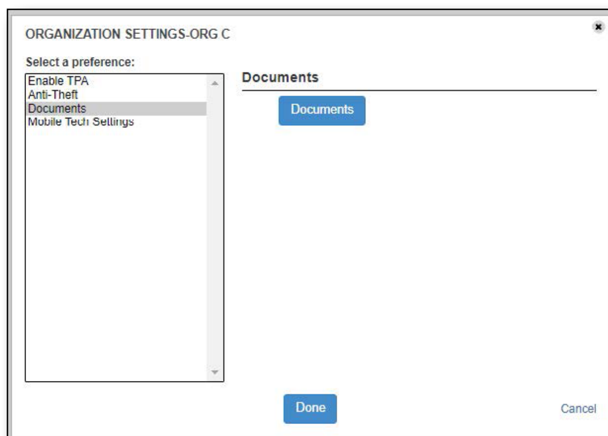
Previously, StrataSync licensed accounts could define centralized settings to control VIAVI Mobile Tech app configuration for thousands of technicians, as well as contain customized documents (e.g. testing methods and procedures guides) technicians could view/download via the Mobile Tech app.

Now, account administrators can define these settings at the per-organization level.

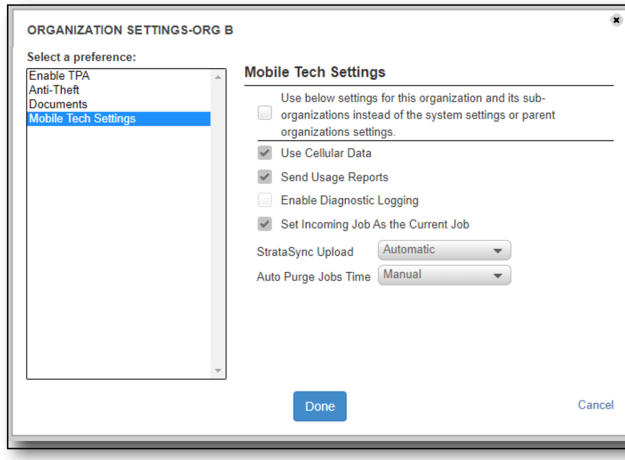
The **Enable organization settings override system settings** checkbox needs to be checked under ***System Settings > Organization Settings*** to use this feature. See *"Organization settings" on page 280.*




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.



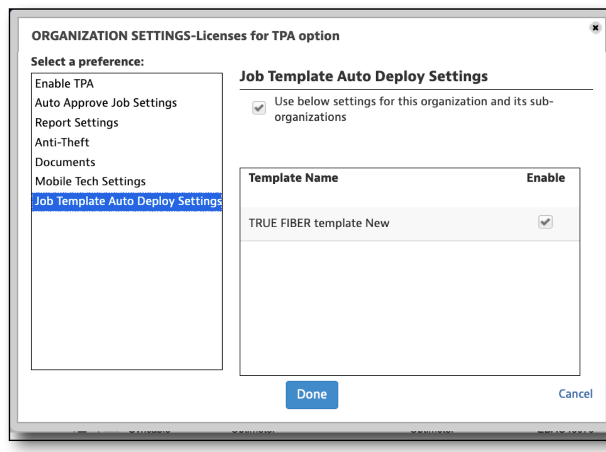
For Mobile Tech Settings, setting **Use below settings for this organization and its sub-organization...** at the per-organization level, overrides any settings at a higher-level organization.




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.

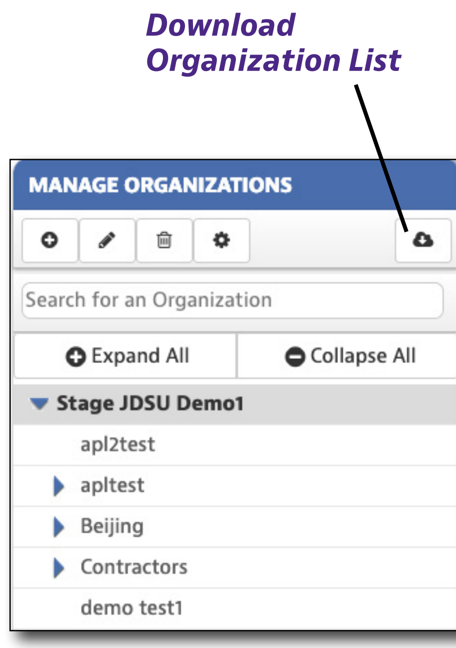
Select **Use below settings for this organization and its sub-organization...** at the per-organization level, to override any settings at a higher-level organization, then configure the settings.

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.




## Assets tab

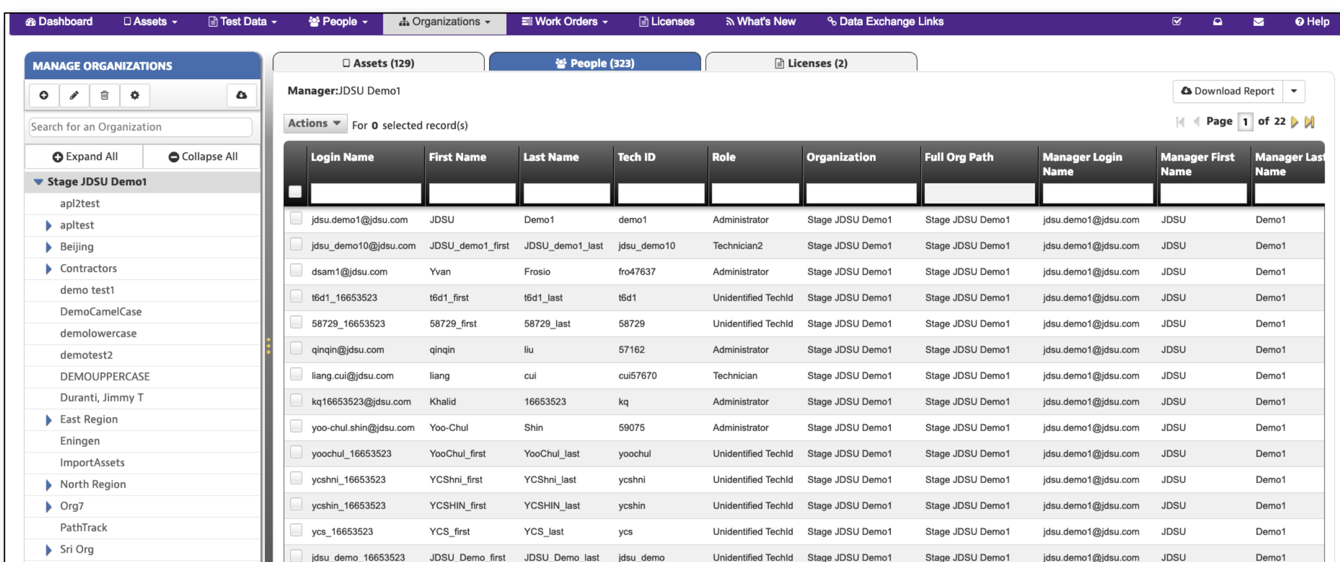
Using the **Assets** tab from the Organization List is similar to details covered previously. See *"Assets" on page 105*.

## 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*.

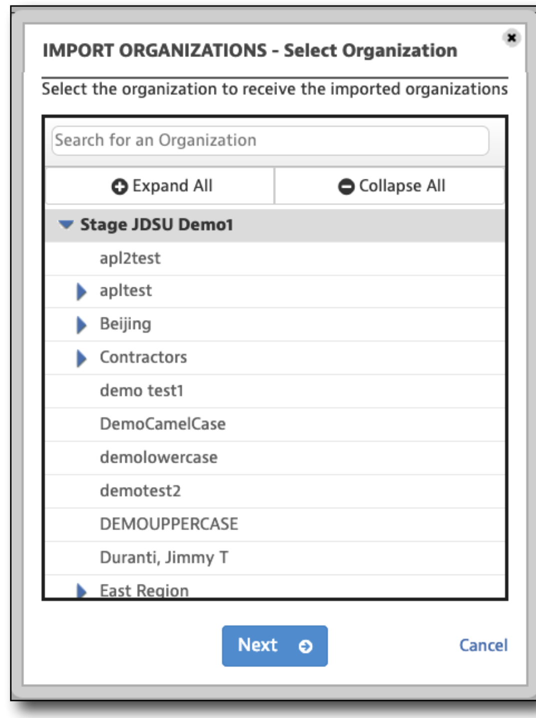



**Organization List, with the People tab selected**

# Importing organizations

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

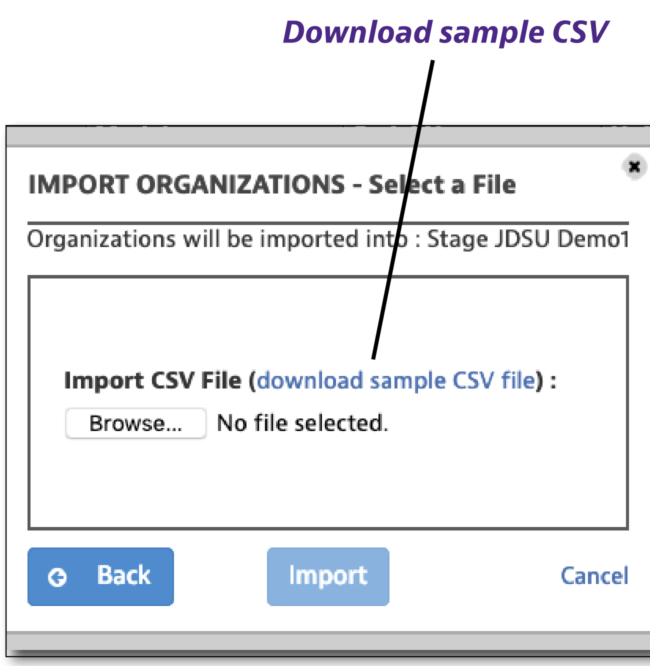
1. Select the **Organizations** tab, and then select ***Import Organizations***. The Import Organizations screen appears.




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.



## Importing changes for organizations

If you have bulk changes to update for organizations, the steps are similar to importing new organizations.

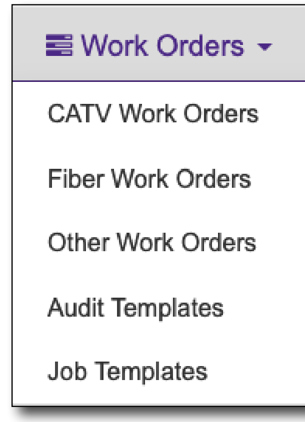
Edit the CSV as needed, (updating the fields that have changed), and reimport the file as before. This includes organization changes, roles, etc.

10

# Work Orders

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

# Work Orders




**Work Orders dropdown menu**

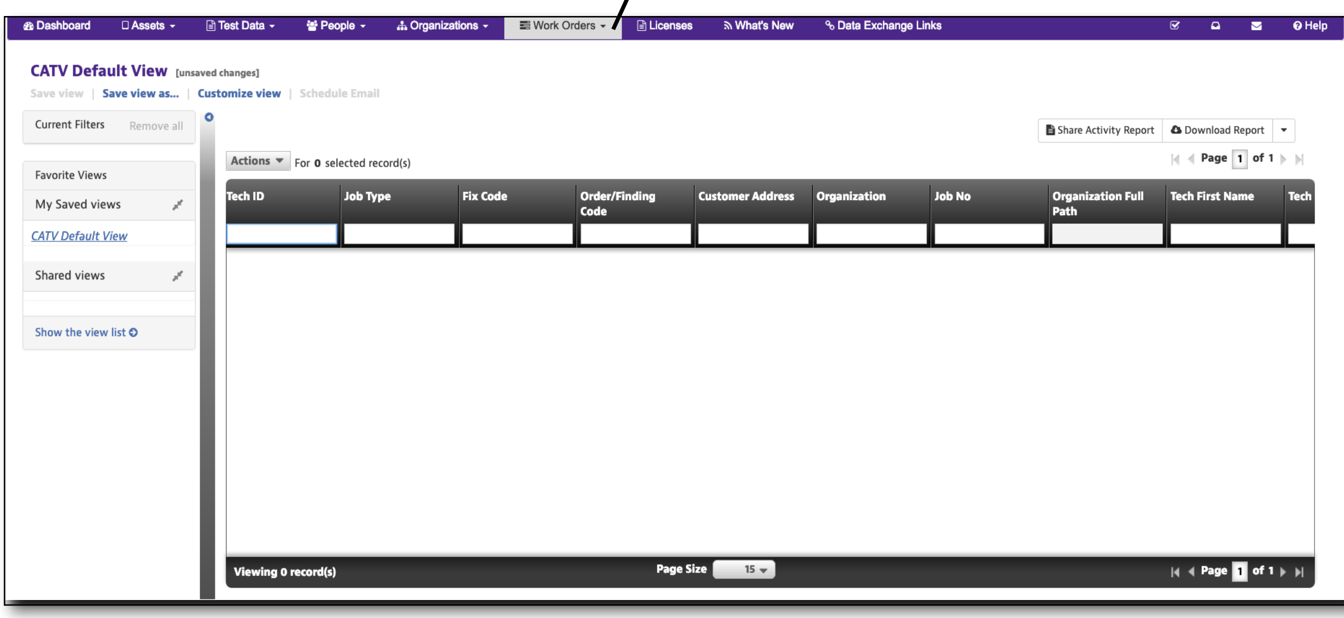
The **Work Orders** tab is the hub for all of the work orders management features of your StrataSync account for your field instruments, including: CATV, Fiber, Other work orders, and Audit templates.

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 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

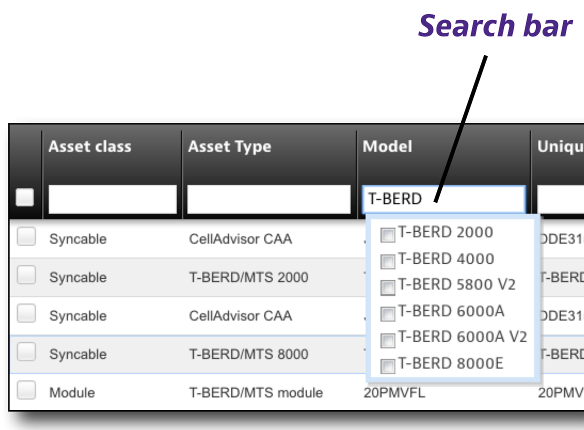
From the Work Order's CATV, Fiber, Other workorders, and Audit Templates, you can easily find a work order using the search bar under each of the column headers or the sorting filters.

## Searching

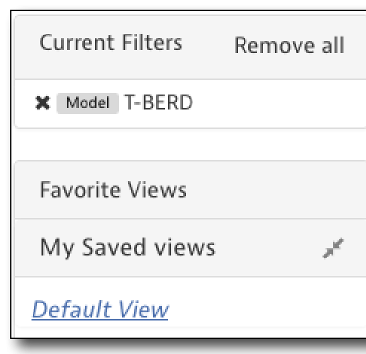
You can search by typing into the search bar under a column header. The list updates with the results.

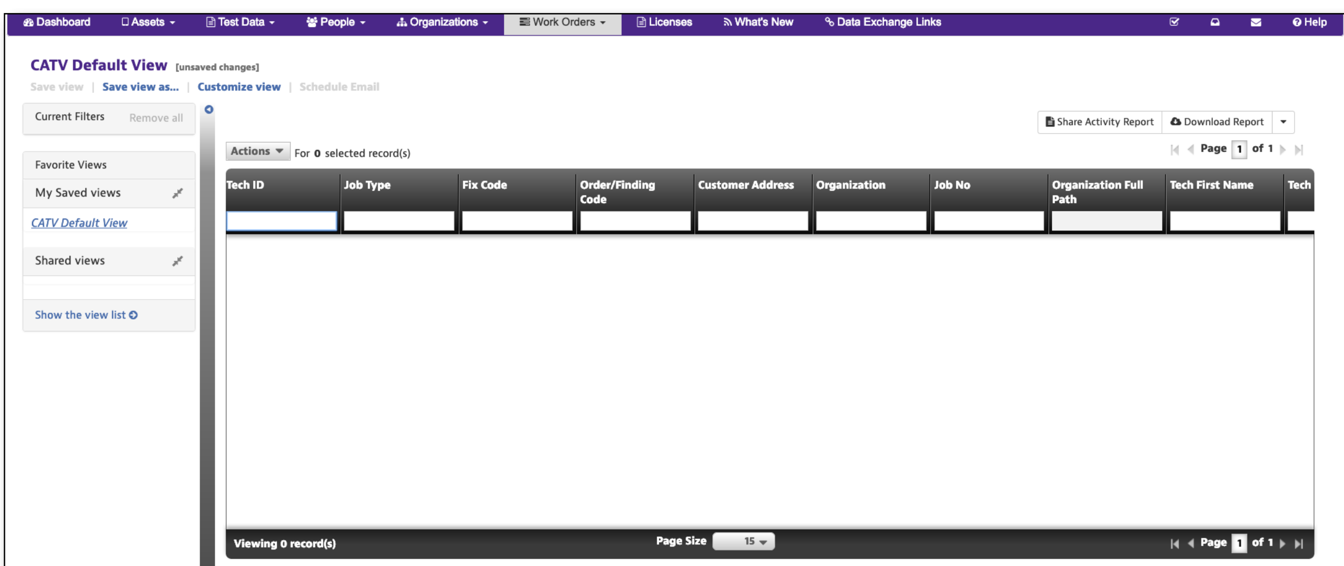
Make sure to include hyphens for product names, etc., (e.g. T-BERD 2000).

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




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



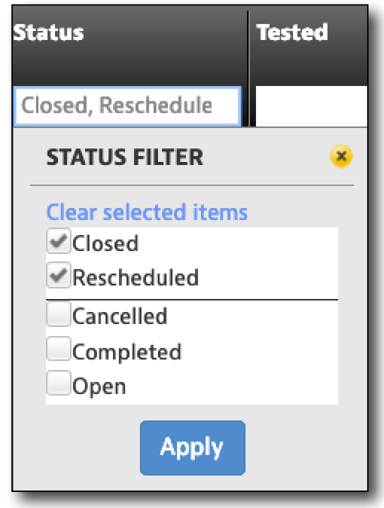




**Scroll to the right to reveal more detail, including Customer Address and Job Number.**

### *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.



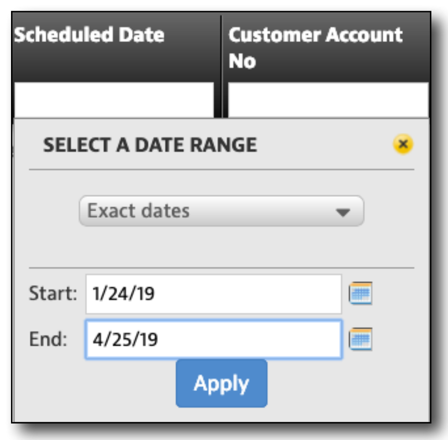

***NOTE:***

***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.

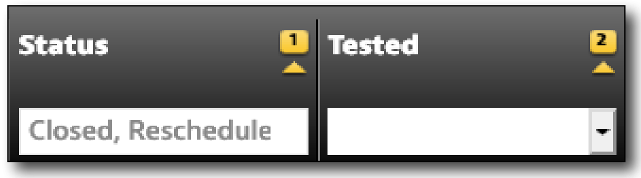


***NOTE:***

***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.



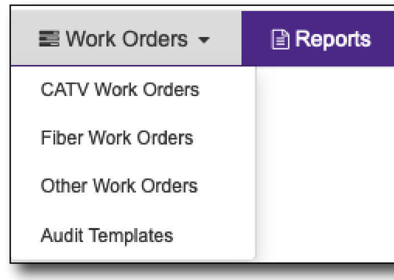

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

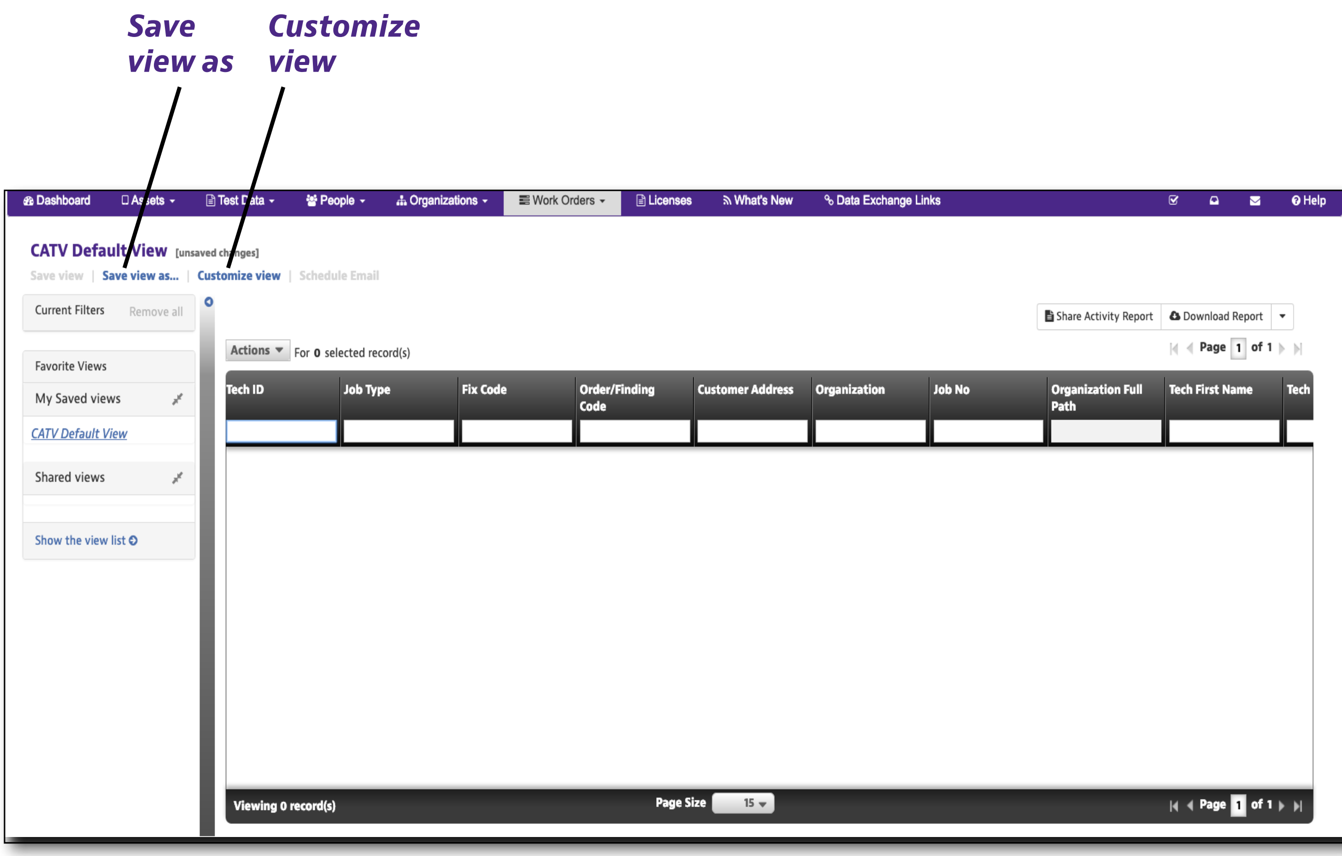
# Views

## 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.

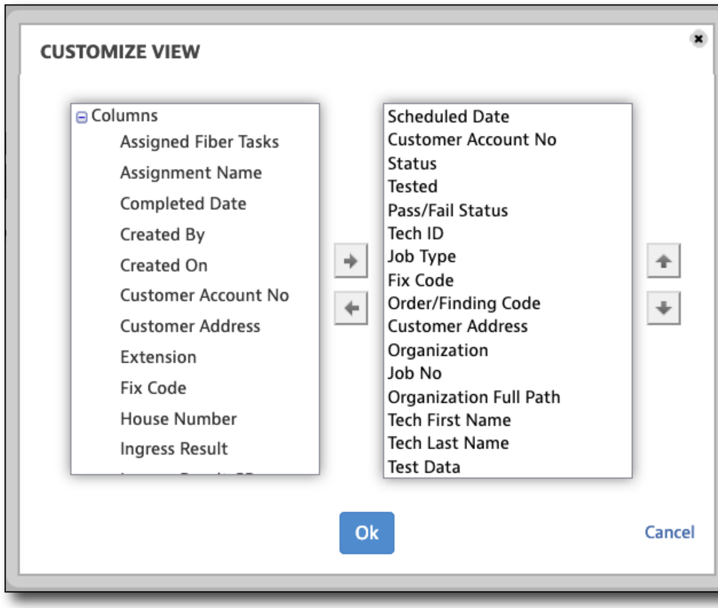



**Work Orders Default View**

The Customize View screens appears.

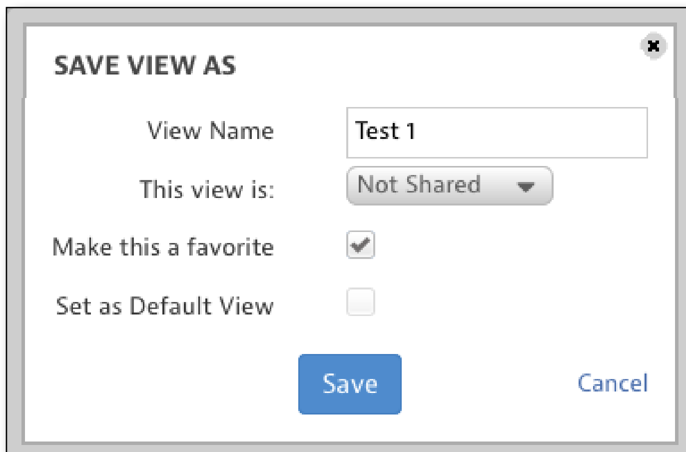
3. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
4. Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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




## Saving views

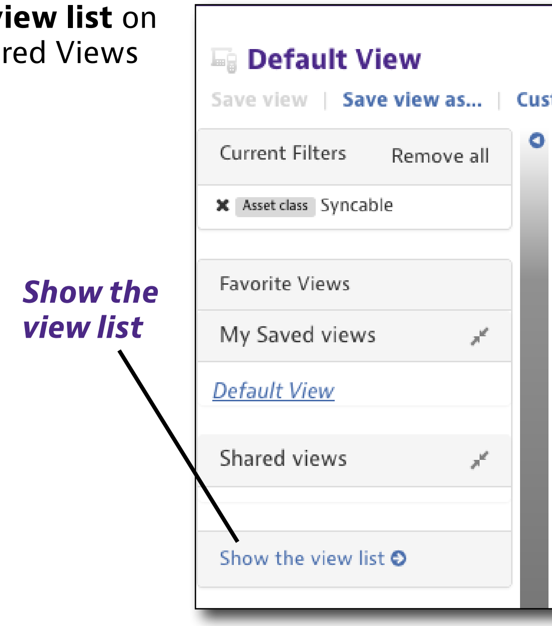
1. From the Work Orders List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
2. Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
3. When done, click **Save**.

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

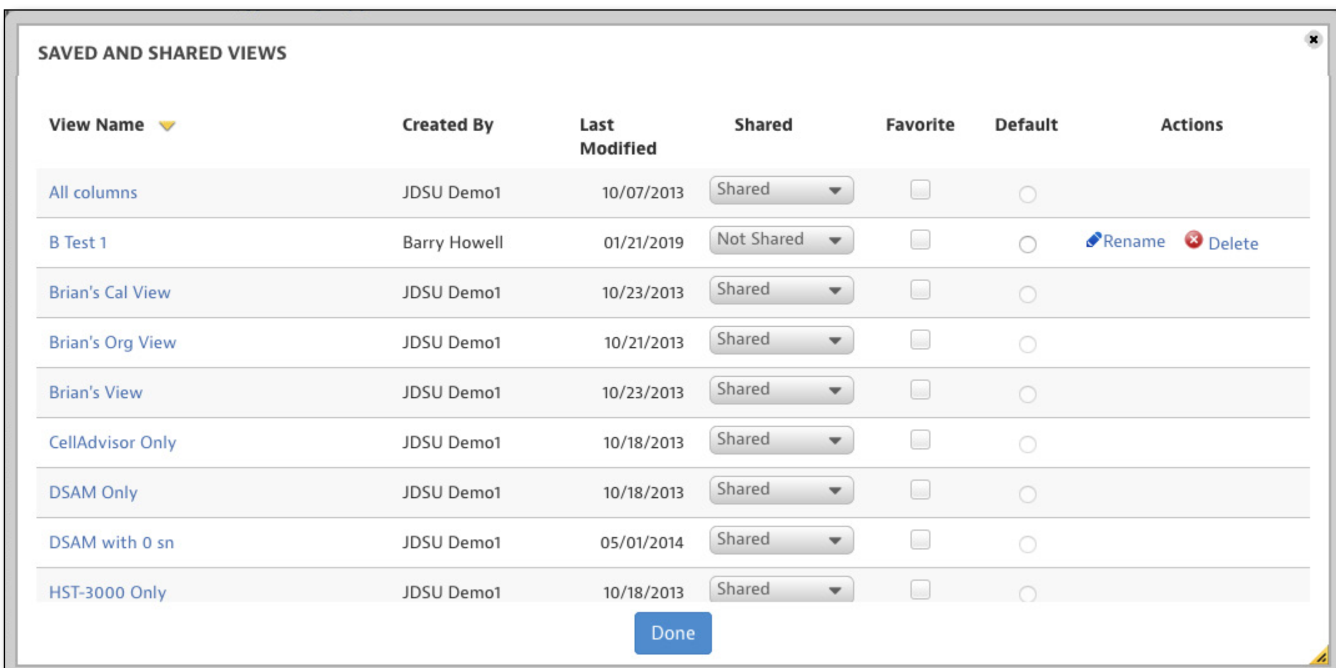


## Sharing and editing views

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




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

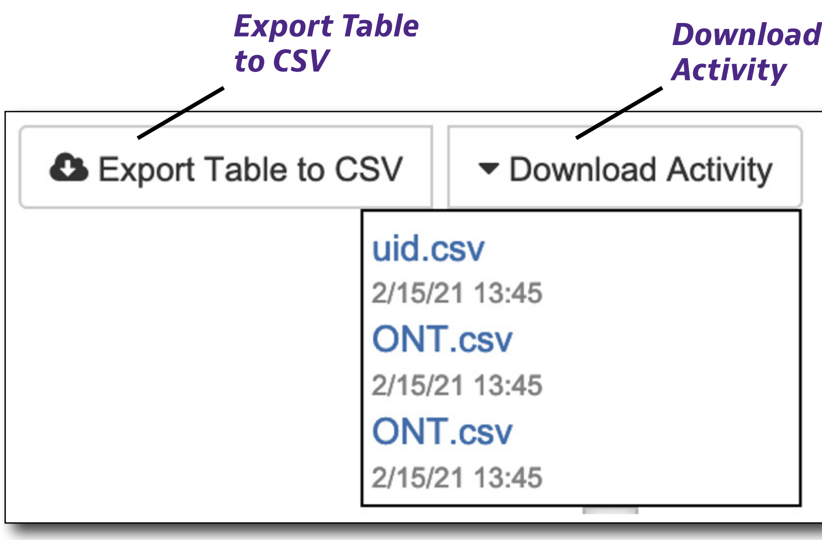
## Exporting lists to CSV

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.

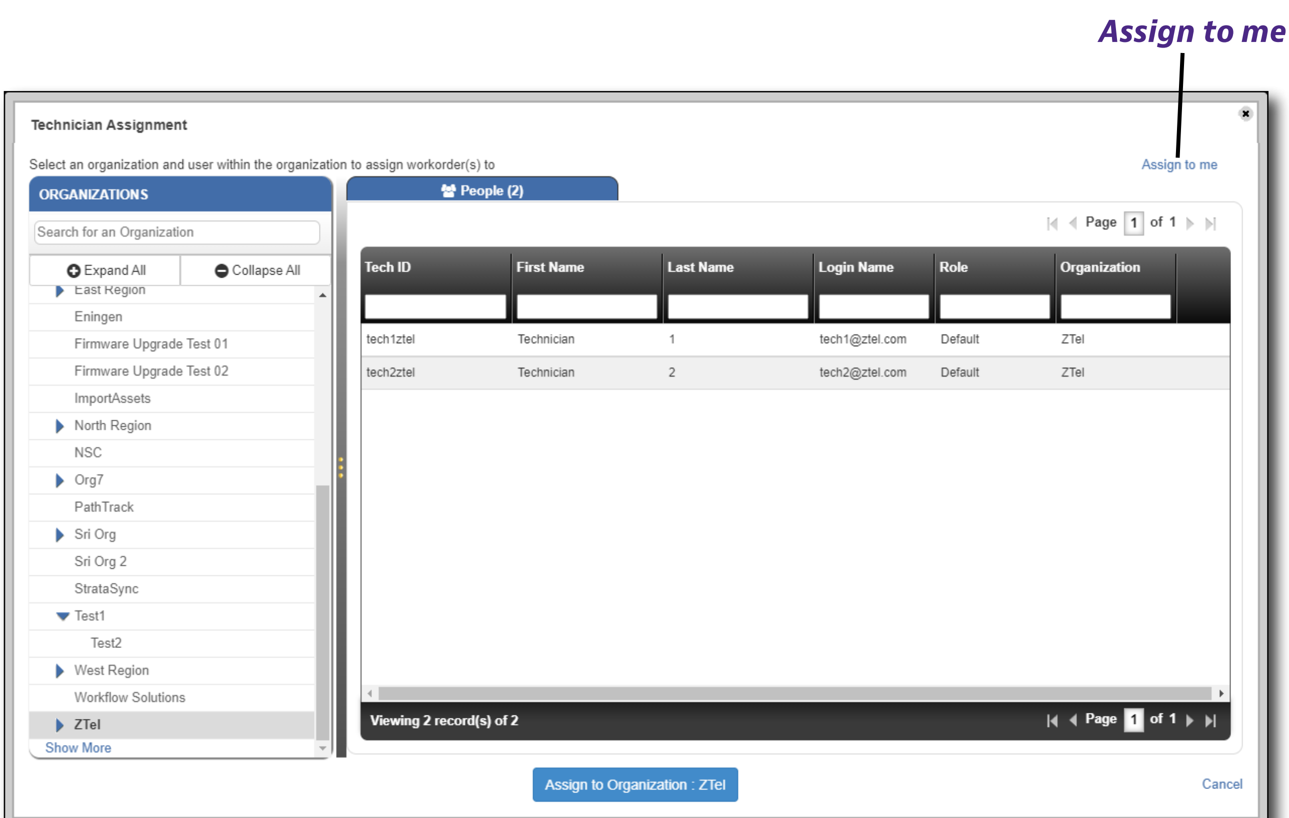
StrataSync supports assigning generic and cable work orders to an organization instead of a technician via the UI. For cable workorders, this is achieved via the **Work Orders > CATV Work Orders** view. For generic workorders of type ‘viaviJob’, this is achieved via the **Work Orders > Other Work Orders** 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.

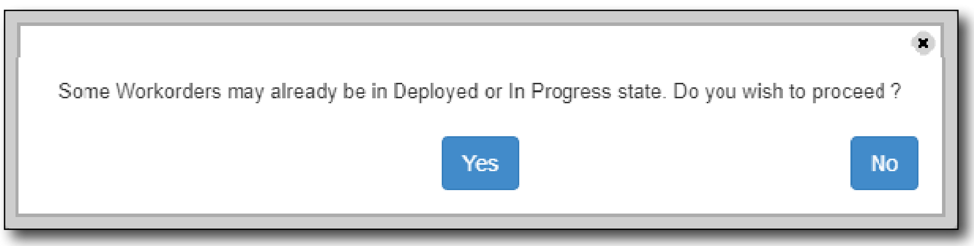


1. From the Work Order List, select a work order (or orders) by clicking the checkbox to the left of the item.
2. Right-click the item (or use the **Action** dropdown) and select ***Assign*.** The Technican Assignment screen appears.
3. Select the organization and a user, then click the **Assign to Organization**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

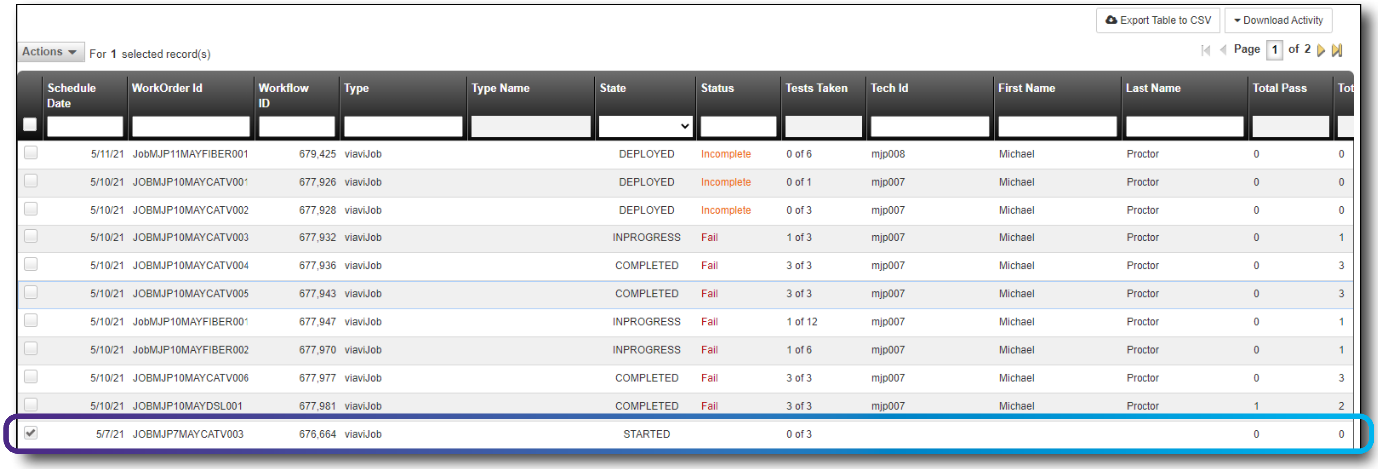
   If you assign a workorder to a technician, the 'State' of the workorder is changed to "ASSIGNED".
4. Whenever you assign a work order via the UI, a warning popup window will display indicating that by reassigning a work order which is already deployed or in-progress, you will remove that original assignment 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 | Tot |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 5/11/21 | JobMJP11MAYFIBER001 | 679,425 | viaviJob | | DEPLOYED | Incomplete | 0 of 6 | mjp008 | Michael | Proctor | 0 | 0 |
| 5/10/21 | JOBMJP10MAYCATV001 | 677,926 | viaviJob | | DEPLOYED | Incomplete | 0 of 1 | mjp007 | Michael | Proctor | 0 | 0 |
| 5/10/21 | JOBMJP10MAYCATV002 | 677,928 | viaviJob | | DEPLOYED | Incomplete | 0 of 3 | mjp007 | Michael | Proctor | 0 | 0 |
| 5/10/21 | JOBMJP10MAYCATV003 | 677,932 | viaviJob | | INPROGRESS | Fail | 1 of 3 | mjp007 | Michael | Proctor | 0 | 1 |
| 5/10/21 | JOBMJP10MAYCATV004 | 677,936 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| 5/10/21 | JOBMJP10MAYCATV005 | 677,943 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| 5/10/21 | JobMJP10MAYFIBER001 | 677,947 | viaviJob | | INPROGRESS | Fail | 1 of 12 | mjp007 | Michael | Proctor | 0 | 1 |
| 5/10/21 | JobMJP10MAYFIBER002 | 677,970 | viaviJob | | INPROGRESS | Fail | 1 of 6 | mjp007 | Michael | Proctor | 0 | 1 |
| 5/10/21 | JOBMJP10MAYCATV006 | 677,977 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| 5/10/21 | JOBMJP10MAYDSL001 | 677,981 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 1 | 2 |
| 5/7/21 | JOBMJP7MAYCATV003 | 676,664 | viaviJob | | 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.

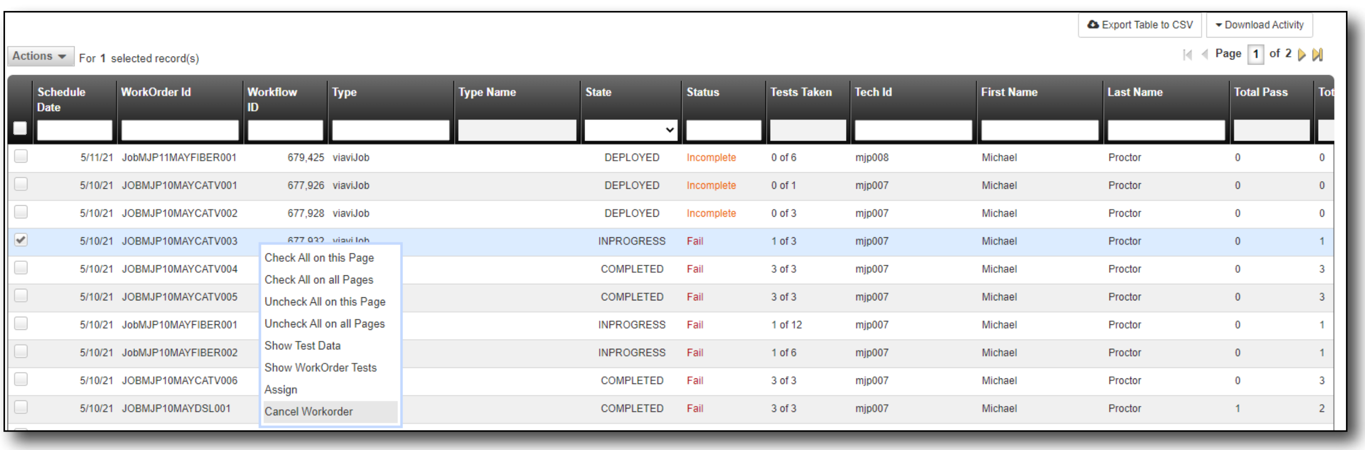
Cancelling and re-activating work orders requires the ‘Edit Work Orders’ permission, and deleting workorders requires the ‘Delete Work Orders’ permission. See *"Job Management (Previously Work Order Management)**" on page 210.*

Please note these actions can only be performed one work order at a time.

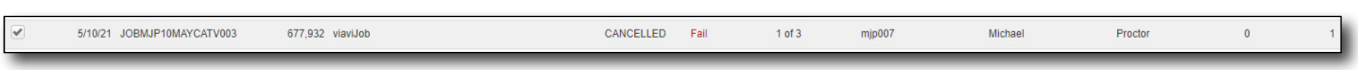
1. From the Work Order List, select the checkbox next to the work order you want to cancel.
2. Right-click the item (or use the **Action** dropdown) and select ***Cancel Work Order***.
3. A confirmation screen asks you to confirm. Click **Confirm.**

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.

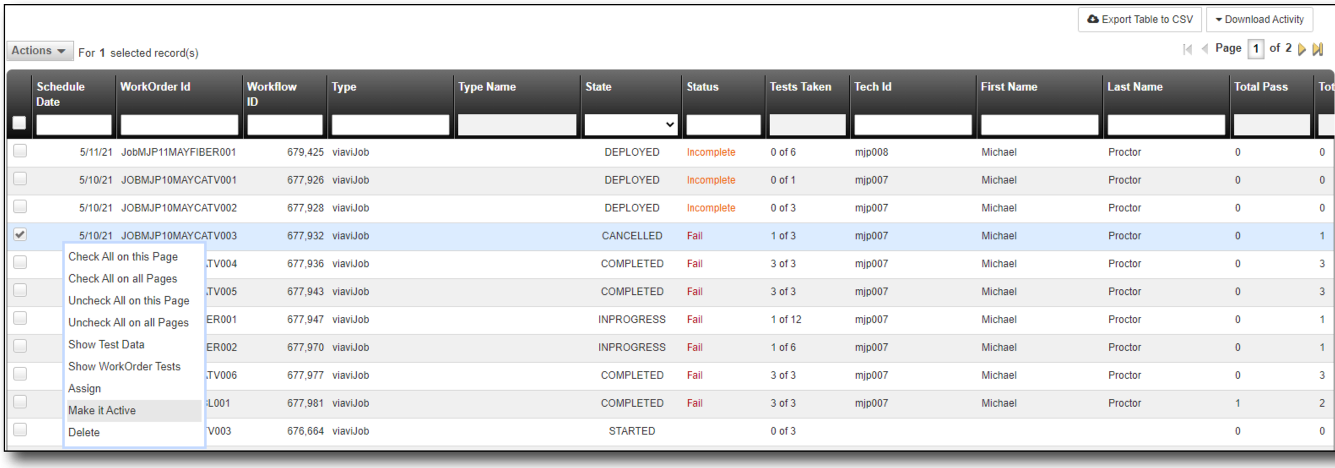
In the example below, the work order “JOBMJP10MAYCATV003” is selected and the **Cancel Workorder** action selected.




The workorder ‘State’ has been updated to “CANCELLED”.



By selecting this same cancelled workorder you can select the ***Make it Active*** action, shown below.



Export Table to CSV | Download Activity

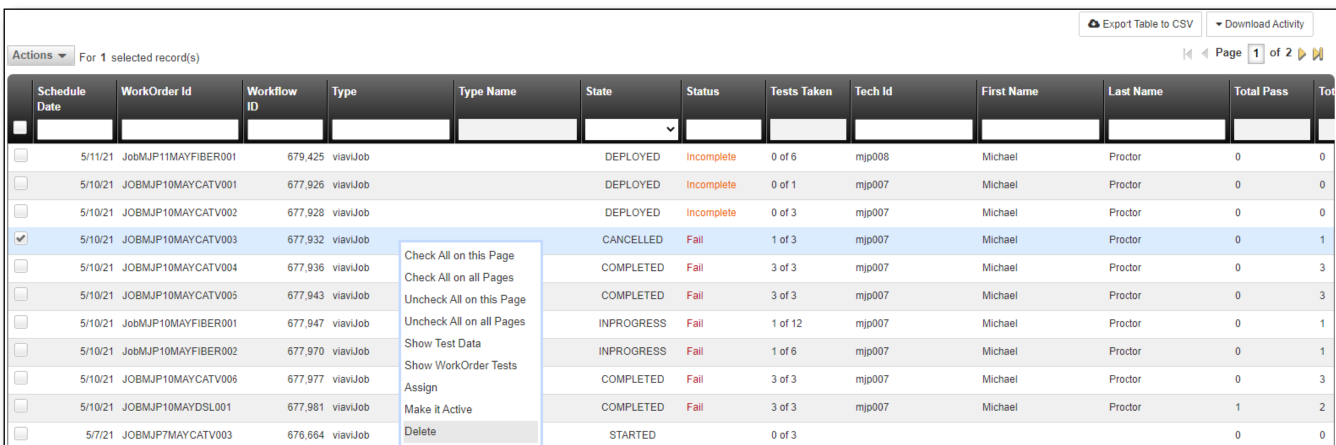
Actions | For 1 selected record(s) | Page 1 of 2

| | Schedule Date | WorkOrder Id | Workflow ID | Type | Type Name | State | Status | Tests Taken | Tech Id | First Name | Last Name | Total Pass | Tot |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 5/11/21 | JobMJP11MAYFIBER001 | 679,425 | viaviJob | | DEPLOYED | Incomplete | 0 of 6 | mjp008 | Michael | Proctor | 0 | 0 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV001 | 677,926 | viaviJob | | DEPLOYED | Incomplete | 0 of 1 | mjp007 | Michael | Proctor | 0 | 0 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV002 | 677,928 | viaviJob | | DEPLOYED | Incomplete | 0 of 3 | mjp007 | Michael | Proctor | 0 | 0 |
| ☑ | 5/10/21 | JOBMJP10MAYCATV003 | 677,932 | viaviJob | | CANCELLED | Fail | 1 of 3 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | | TV004 | 677,936 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | | TV005 | 677,943 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | | ER001 | 677,947 | viaviJob | | INPROGRESS | Fail | 1 of 12 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | | ER002 | 677,970 | viaviJob | | INPROGRESS | Fail | 1 of 6 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | | TV006 | 677,977 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | | L001 | 677,981 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 1 | 2 |
| ☐ | | V003 | 676,664 | viaviJob | | 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.

| | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☑ | 5/10/21 | JOBMJP10MAYCATV003 | 677,932 | viaviJob | INPROGRESS | Fail | 1 of 3 | mjp007 | Michael | Proctor | 0 | 1 |

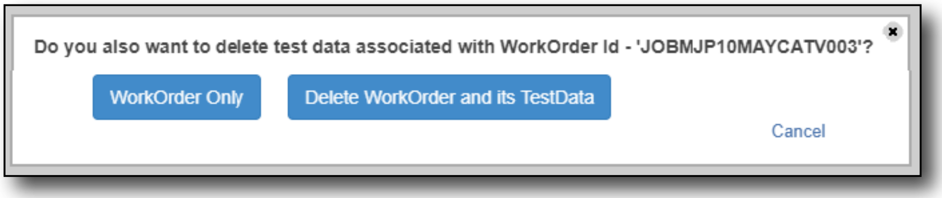


Export Table to CSV | Download Activity

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 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| ☐ | 5/11/21 | JobMJP11MAYFIBER001 | 679,425 | viaviJob | | DEPLOYED | Incomplete | 0 of 6 | mjp008 | Michael | Proctor | 0 | 0 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV001 | 677,926 | viaviJob | | DEPLOYED | Incomplete | 0 of 1 | mjp007 | Michael | Proctor | 0 | 0 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV002 | 677,928 | viaviJob | | DEPLOYED | Incomplete | 0 of 3 | mjp007 | Michael | Proctor | 0 | 0 |
| ☑ | 5/10/21 | JOBMJP10MAYCATV003 | 677,932 | viaviJob | | CANCELLED | Fail | 1 of 3 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV004 | 677,936 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV005 | 677,943 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | 5/10/21 | JobMJP10MAYFIBER001 | 677,947 | viaviJob | | INPROGRESS | Fail | 1 of 12 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | 5/10/21 | JobMJP10MAYFIBER002 | 677,970 | viaviJob | | INPROGRESS | Fail | 1 of 6 | mjp007 | Michael | Proctor | 0 | 1 |
| ☐ | 5/10/21 | JOBMJP10MAYCATV006 | 677,977 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 0 | 3 |
| ☐ | 5/10/21 | JOBMJP10MAYDSL001 | 677,981 | viaviJob | | COMPLETED | Fail | 3 of 3 | mjp007 | Michael | Proctor | 1 | 2 |
| ☐ | 5/7/21 | JOBMJP7MAYCATV003 | 676,664 | viaviJob | | 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.



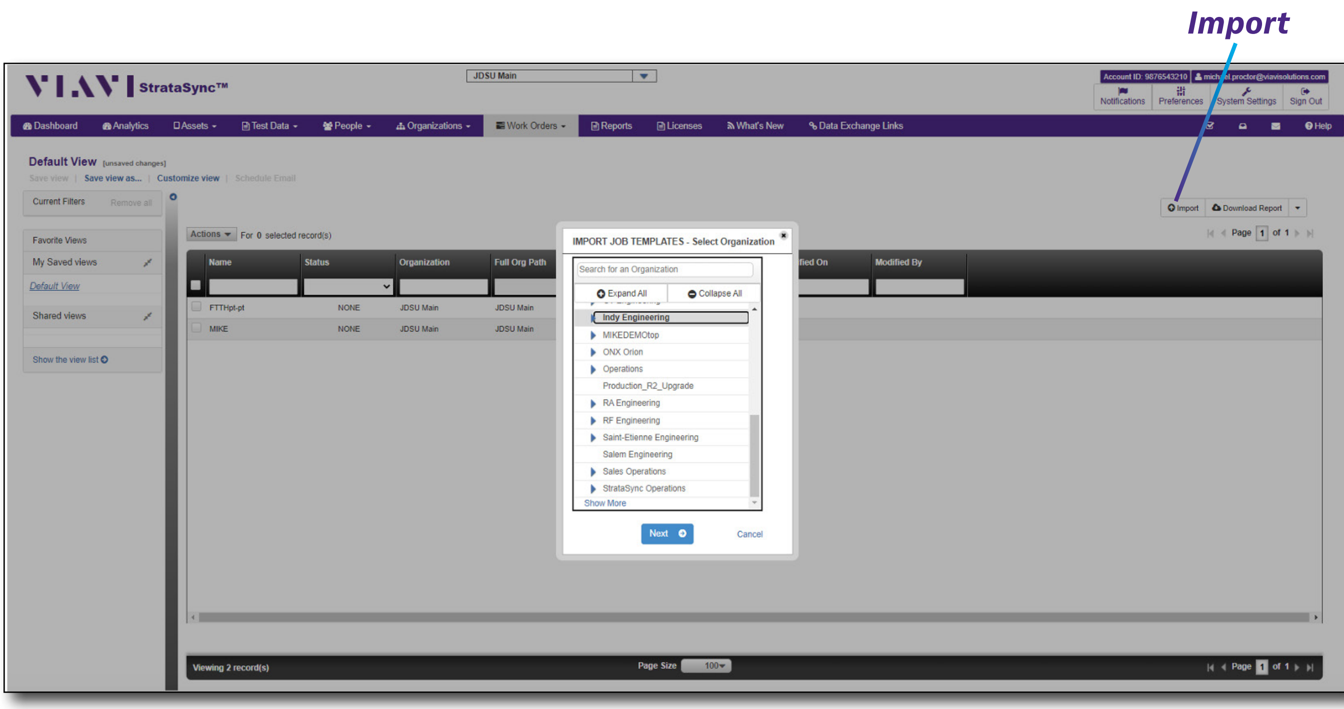

Depending on which option is selected, an appropriate confirmation message is displayed.


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.

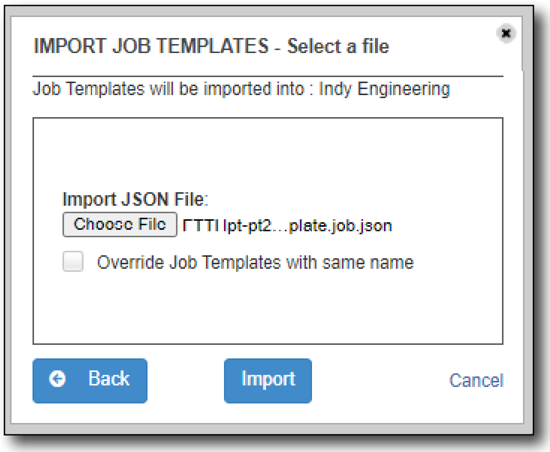


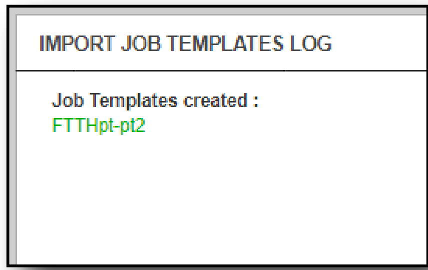

***Job template import***

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.



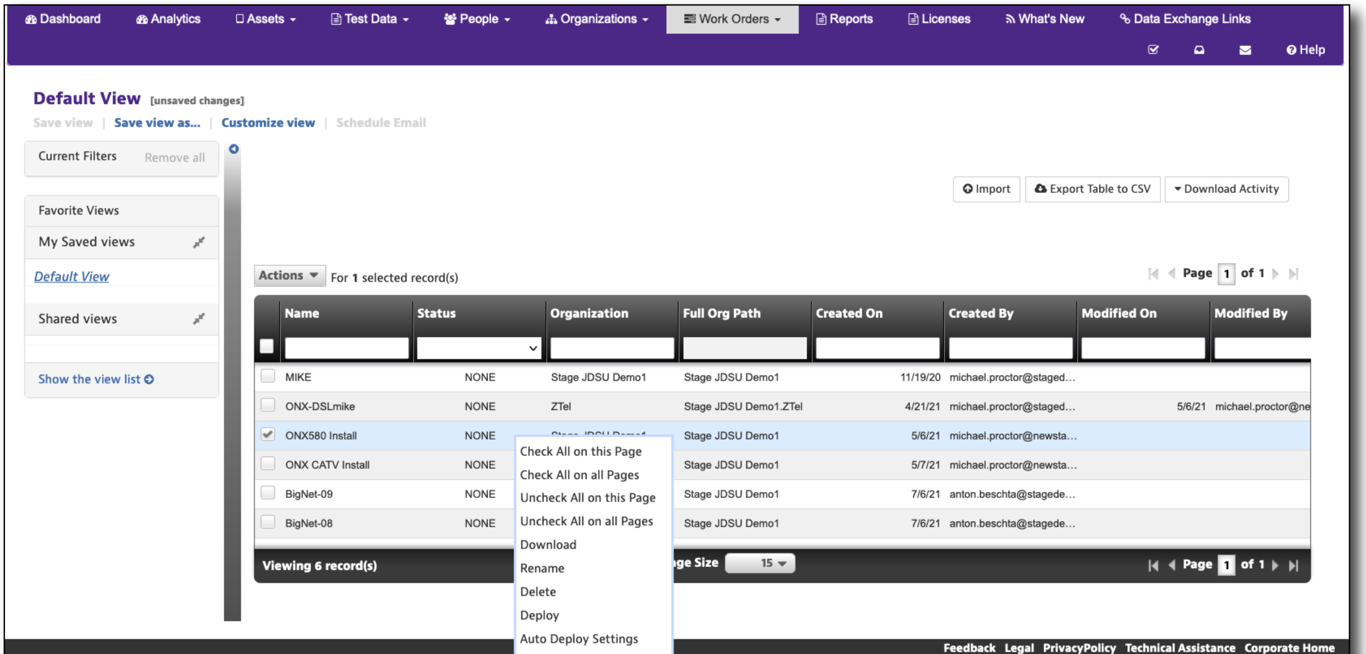




***NOTE:***

***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.




***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 VIAVI Mobile Tech app users associated with that organization or sub-organization (or that have visibility permissions).

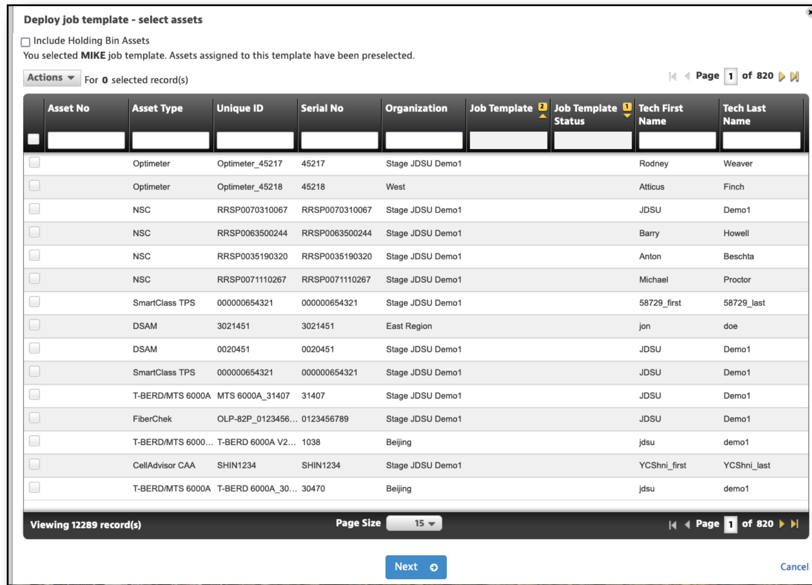
So importing a job template implicitly 'deploys' it based on techId association to an organization for use with Mobile Tech—this doesn't prevent an admin deploying the job template specifically to assets, but could be used instead of this method if all techs connected their instruments via Mobile Tech.

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.

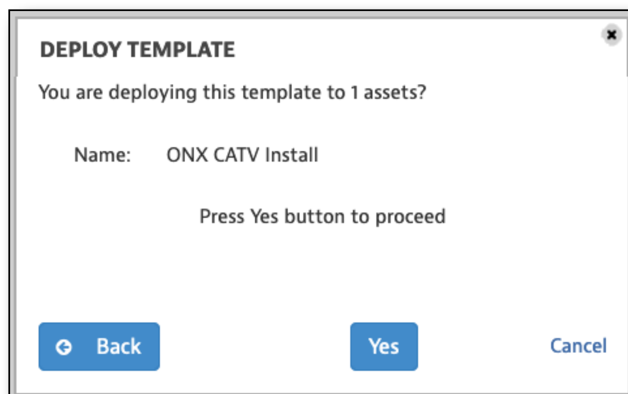
Even single-instrument type job templates can be 'deployed' to Mobile Tech by simply uploading them to a specific directory. Providing technicians connect their instrument to Mobile Tech, they can use the template on Mobile Tech to create jobs to share with the instrument. This alleviates an admin from 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.**




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.



# Automatic template deployment and artifact linking

**Key points**

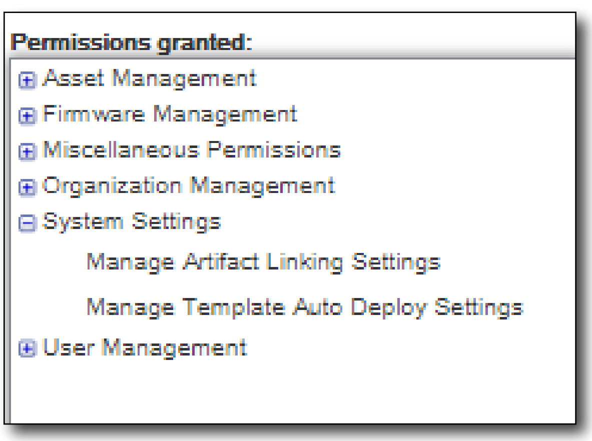
- Templates may be automatically deployed to assets when the template's artifacts have been changed.
- Automatic template deployment is selectable by organization.
- System level permissions are required to enable this capability.
- Users of automatic template deployment should fully understand the organization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

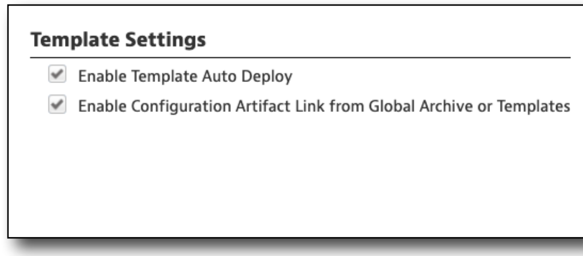
The **Enable Configuration Artifact Link from Global Archive or Templates** checkbox in **System Settings > Template Settings** is visible to users with this permission.

**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

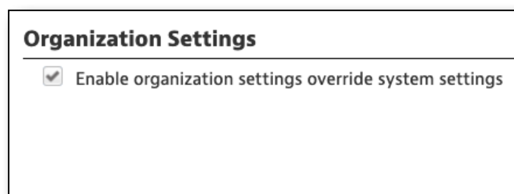
  See *"Artifact linking" on page 150.*

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.

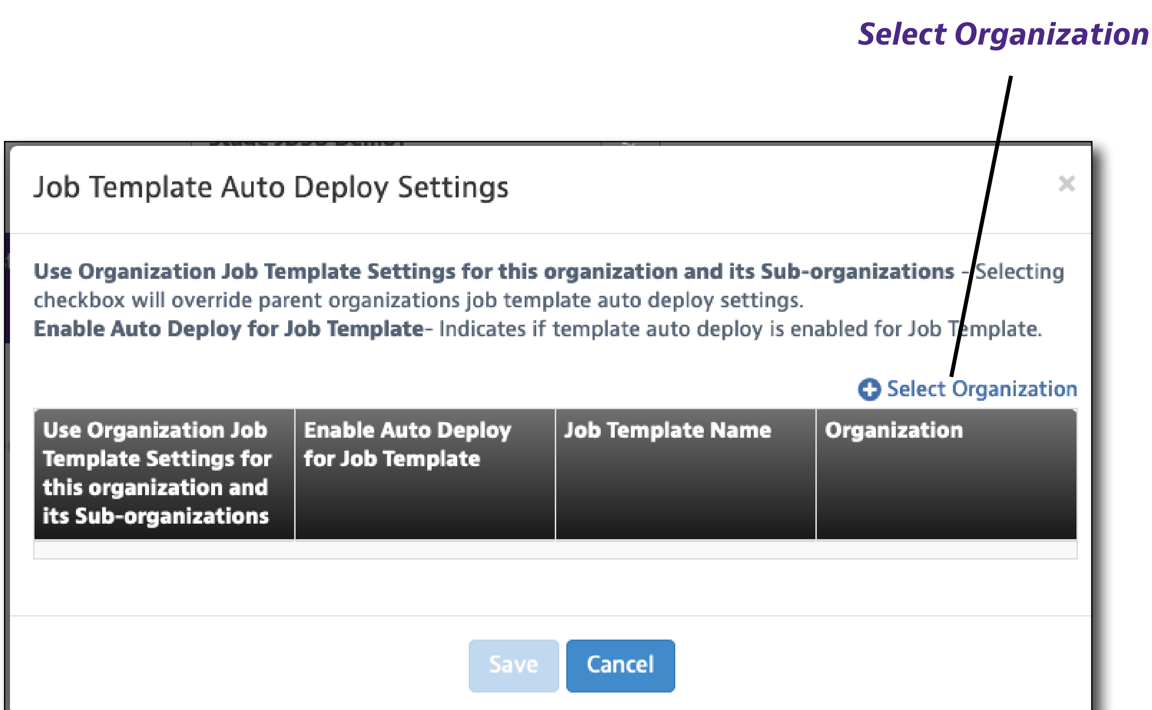
When an organization is participating in auto-deploy of job templates, StrataSync makes sure each asset will have templates that are set up for auto-deploy. If an asset uploads a job template that is not participating in auto-deploy then StrataSync will issue all auto-deploy templates. This will remove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

11

# Licenses

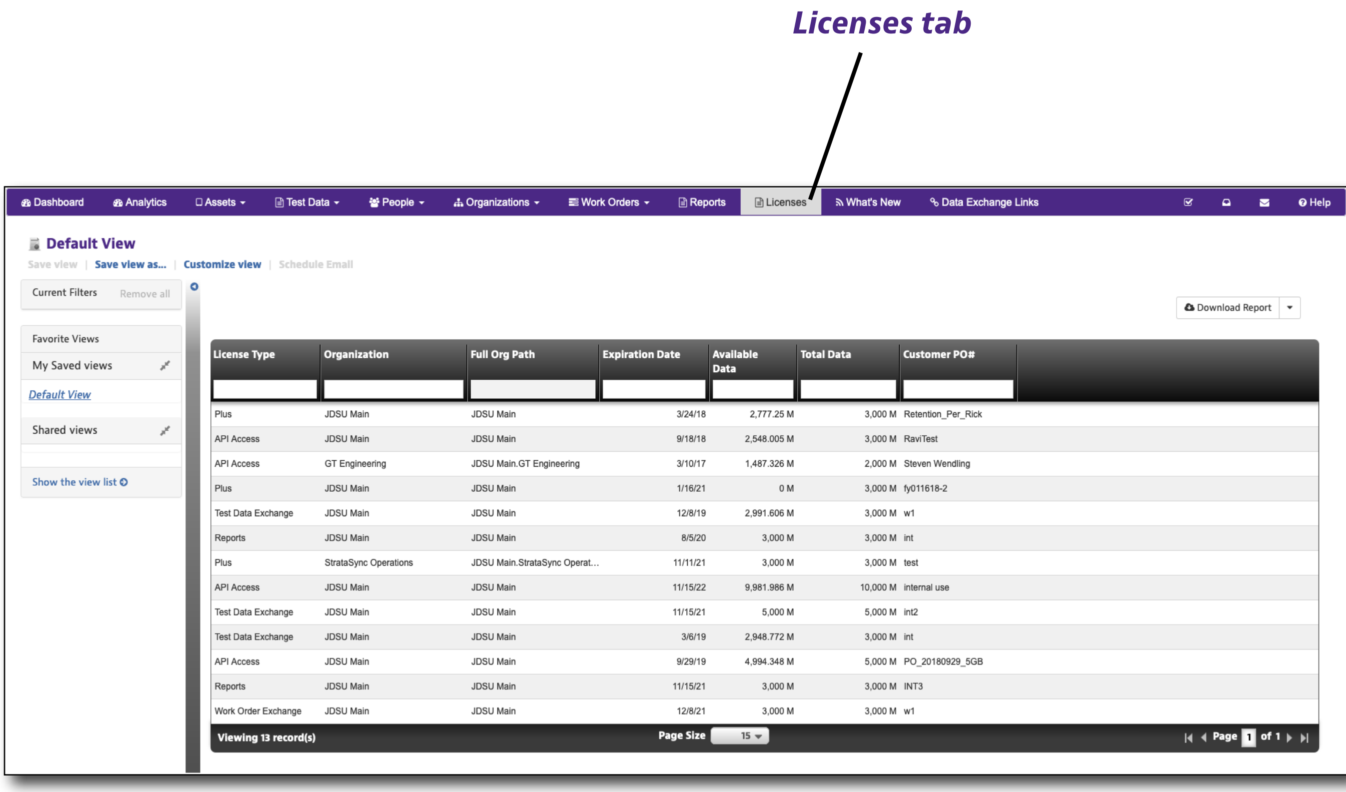
This chapter covers how to use the License Management features of StrataSync, including the following:

# 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 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.

| | Subscription Plans | | | | Support Plans | |
|---|---|---|---|---|---|---|
| **Features** | BASE | PRO | ANALYTICS | ENTERPRISE Workflow | Direct Test Results Server Upload | Automated App-to-App |
| Typical customer | Subcontractors | | Contractors<br>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<br>SS-PRO-2YR<br>SS-PRO-3YR | SS-ANALYTICS-1YR<br>SS-ANALYTICS-2YR<br>SS-ANALYTICS-3YR | SS-ENT-WRKFLW-1YR<br>SS-ENT-WRKFLW-2YR<br>SS-ENT-WRKFLW-3YR | SS-MT-SVRUPLD-SUPP-1YR | SS-MT-A2AIF-SUPP-1YR |
| StrataSync Tech Support | SS-SUPT-1YR<br>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<br>*Extended Test Data Retention Subscription Options:*<br>*SS-TR2-1YR*<br>*SS-TR3-1YR* | | | | |
| Job Management | | Standard | Advanced | | | |
| Dashboards | | | Available default dashboards | | | |
| APIs | | *Test Results API Subscription Options:*<br>*SS-TR-API-1YR*<br>*SS-TR-API-2YR*<br>*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<br>*(+ 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.

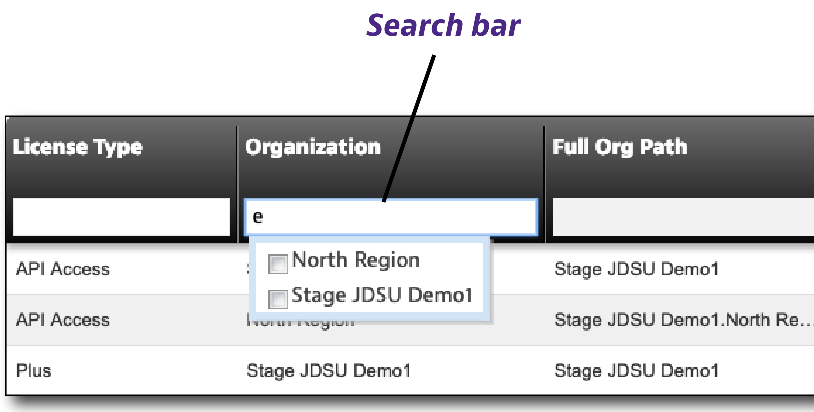
# Searching and sorting

From the Licenses List, you can easily find a license using the search bar under each of the column headers or the sorting filters.

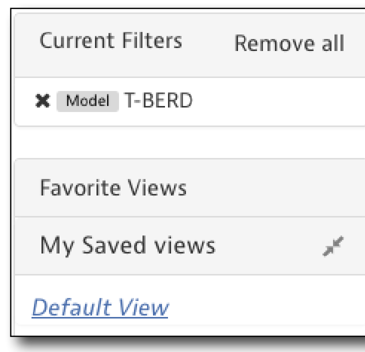
## Searching

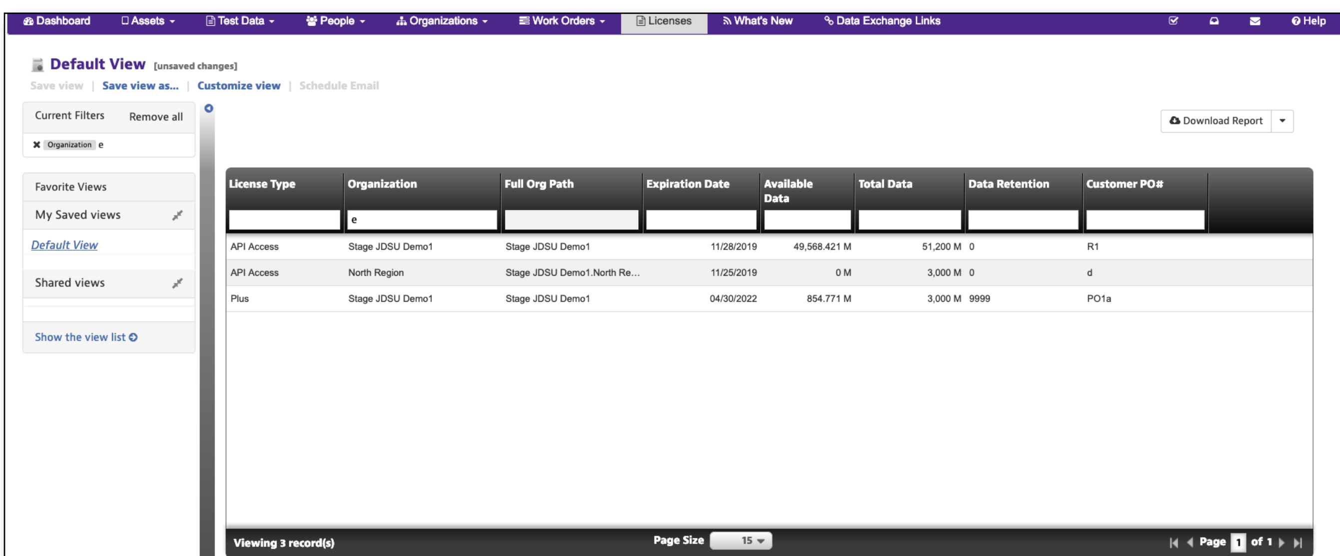
You can search by typing into the search bar under a column header. The list updates with the results.

Some of the columns provide dropdowns with releveant 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.



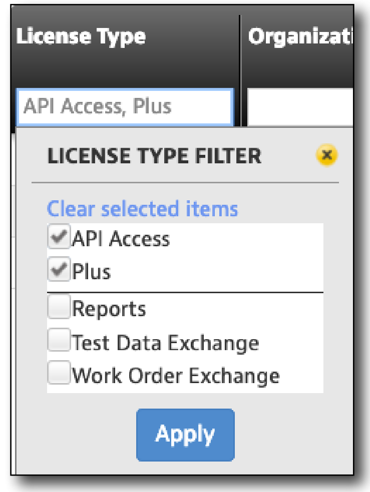




**Licenses List**

### *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.



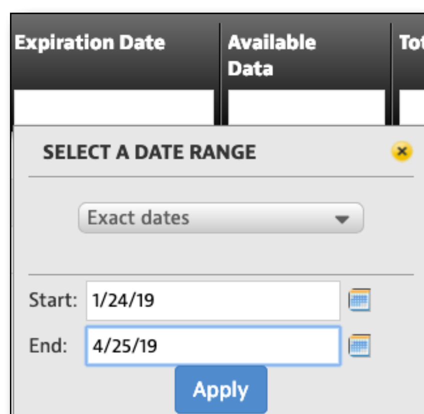

***NOTE:***

***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.

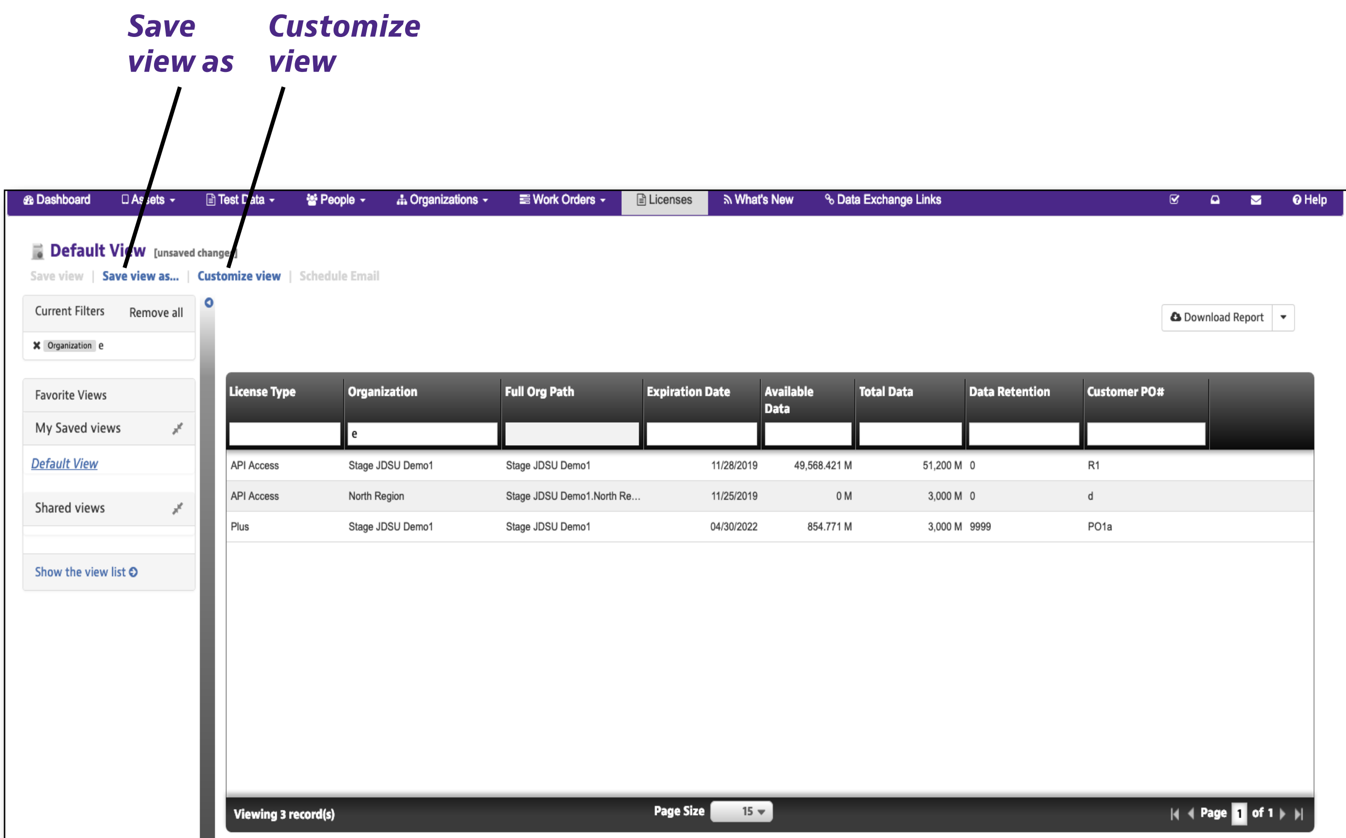

If you have multiple columns selected, you can also set the priority of how the columns themselves are sorted.

# Views

## Customizing views

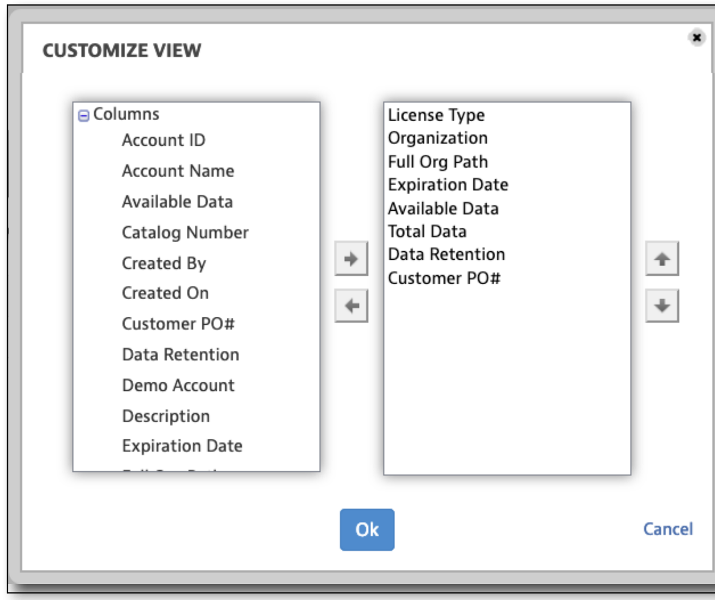
StrataSync gives you the ability to customize your list views.

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




**Licenses Default View**

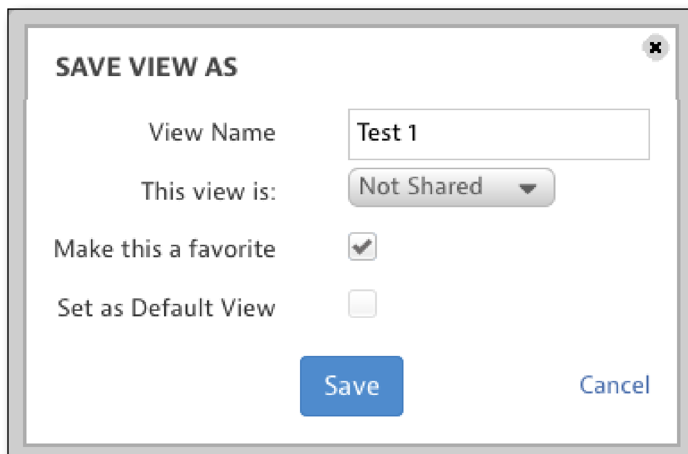
1. The Customize View screens appears.
2. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
3. Select an attribute, then use the arrow buttons to add or remove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




## Saving views

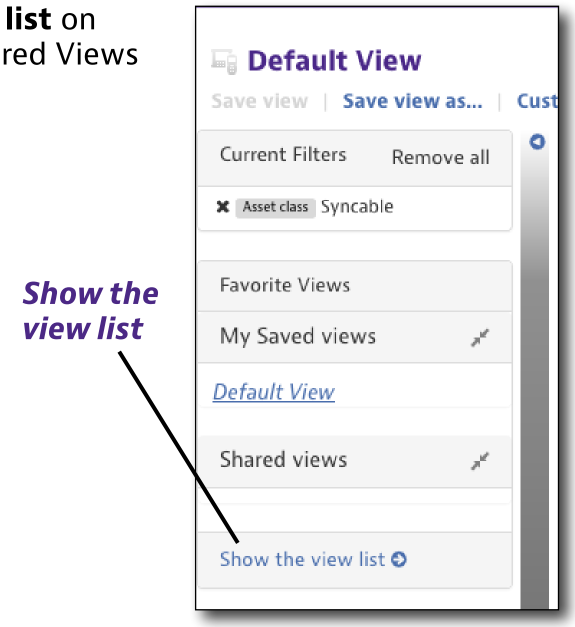
1. From the Licenses List, select **Save view as...** at the upper left of the screen. The Save View As screens appears.
2. Enter a view name, select your sharing options, and choose whether you want to make it a favorite or default view.
3. When done, click **Save**.

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

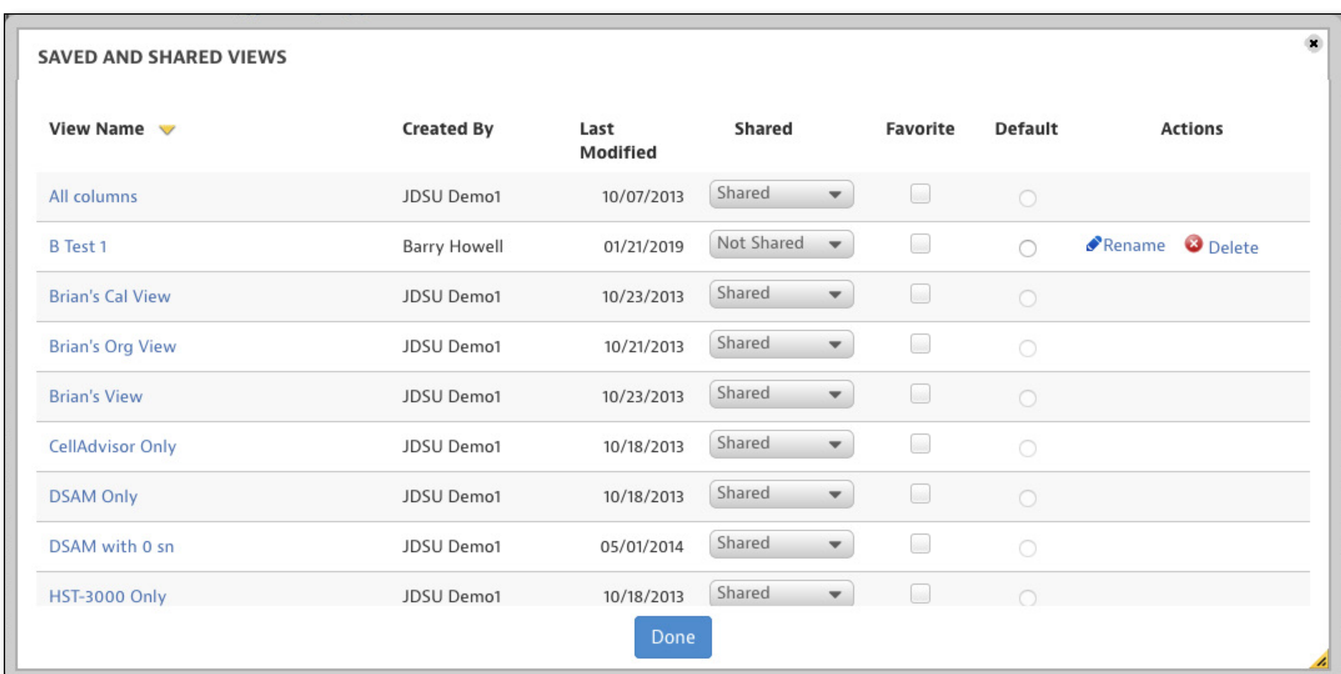


## Sharing and editing views

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




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

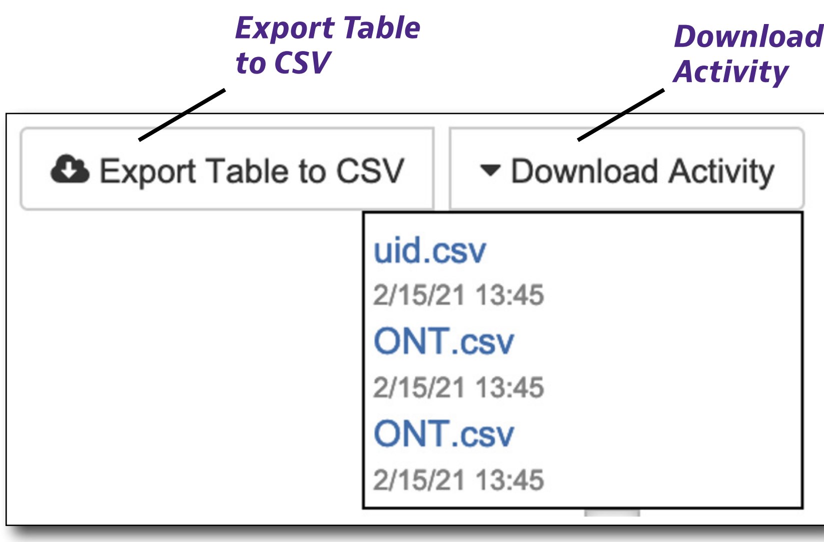
## Exporting lists to CSV

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.*

12

# Configuration

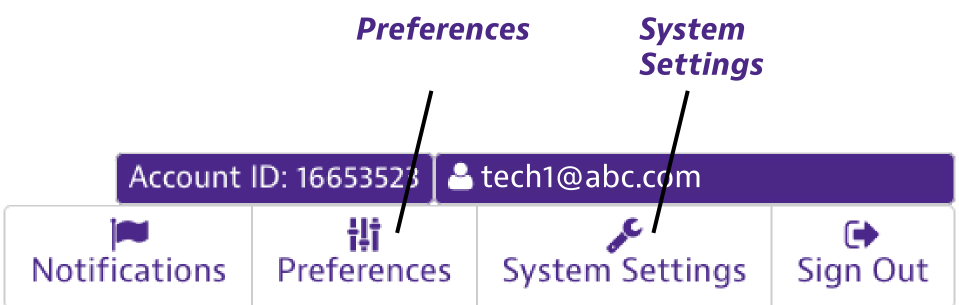
This chapter covers how to configure the StrataSync system, including the following::

# Configuration

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

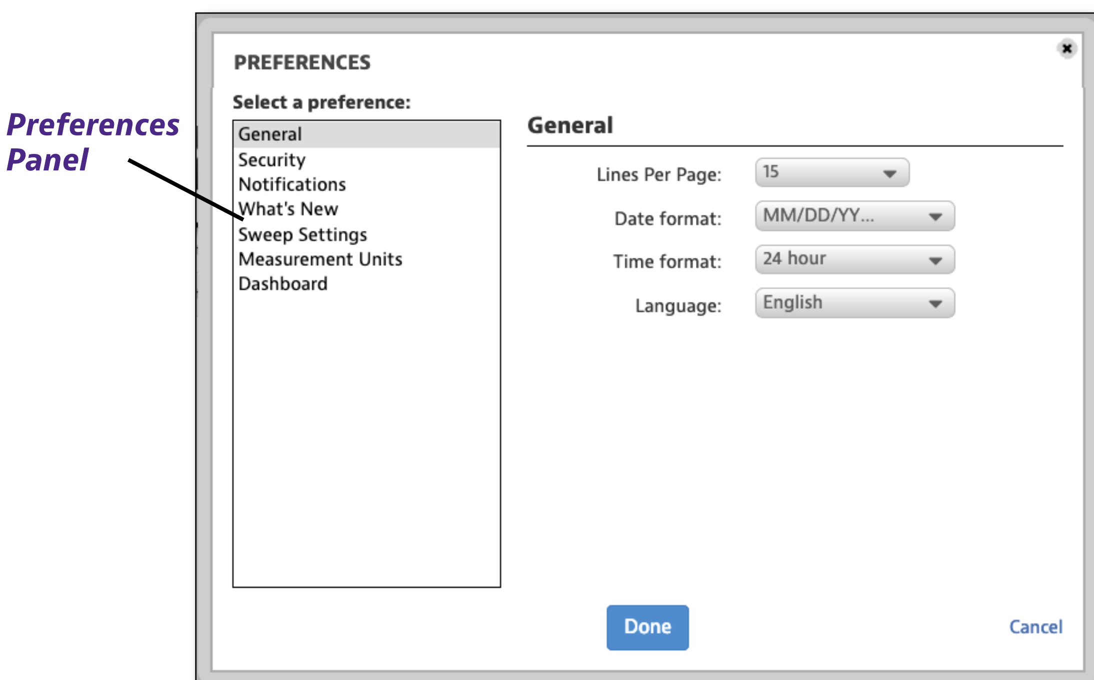
The **System Settings** feature allows StrataSync administrators to configure the overall system, including security, asset management, organization, firmware management, and configuration template settings.

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

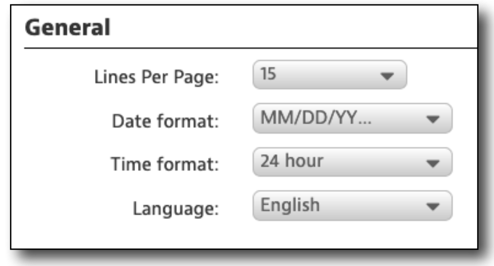
On the left side of the screen is the **Preferences Panel**, with several categories of user preferences. Select one to show the options on the right.




User Preferences, with General selected

## General

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



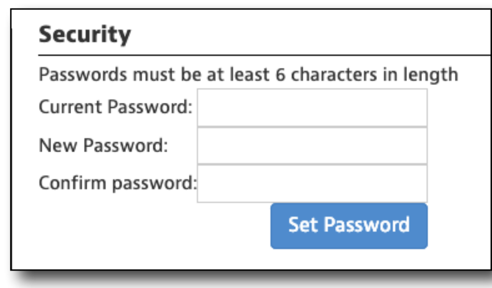

This feature allows you to set up lines per page, date and time formats, and language for the site.

When finished, click **Done**.

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

## Security

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

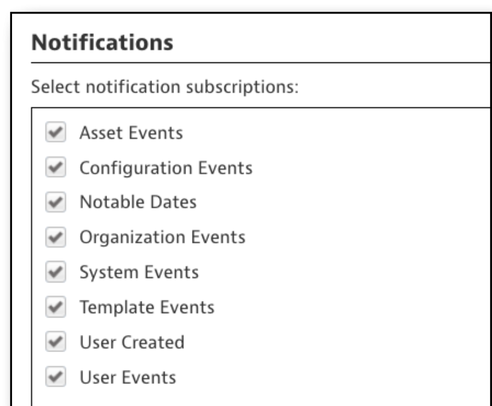



This feature allows you to set up and change your password.

When finished, click **Done**.

## Notifications

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

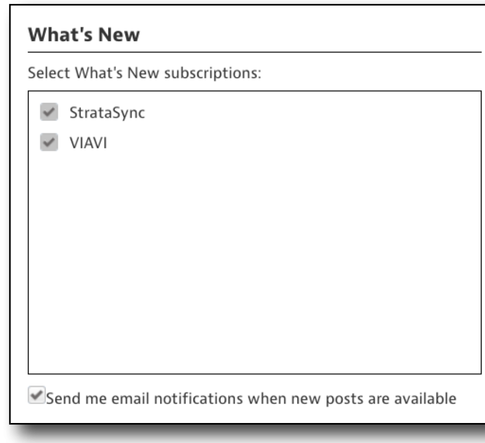



This feature allows you choose what system event notifications you are subscribed to.

When finished, click **Done**.

## What's new

Select **What's New** to bring up the What's New section.

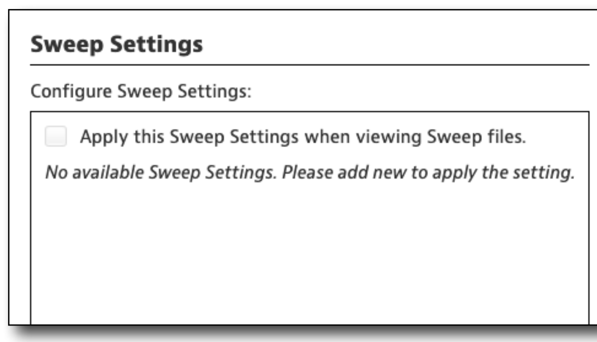



This feature allows you choose what application events and announcements you are subscribed to. You can also subscribe for email notifications for new posts.

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.

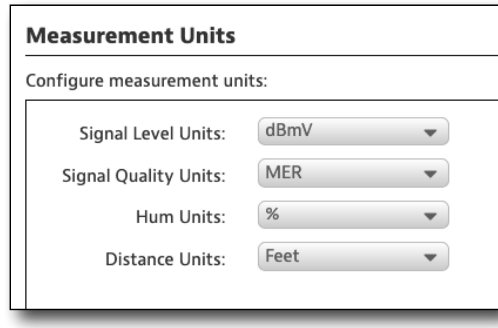
When finished, click **Done**.

## 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**.

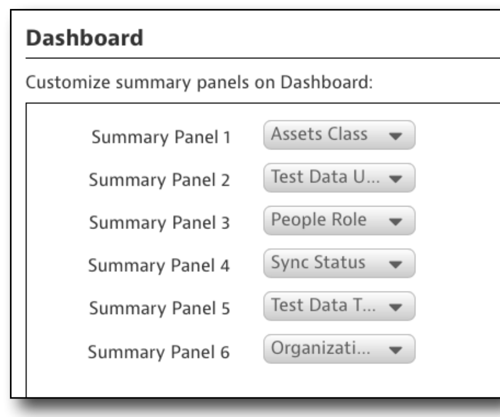



## Dashboard

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.

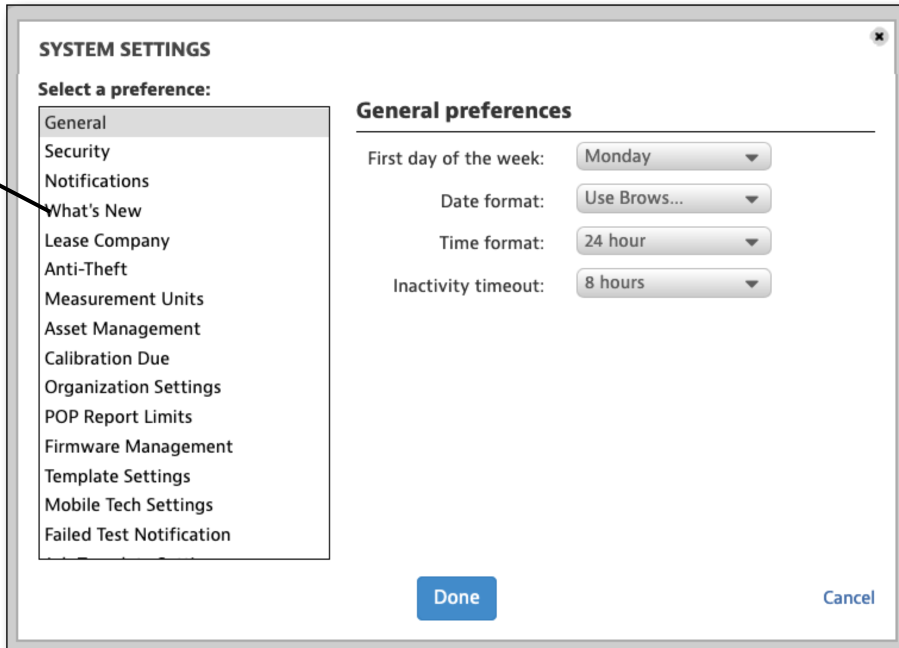
When finished, click **Done**.



# 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.

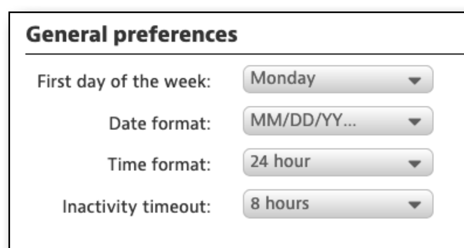
***System Settings panel***




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:***

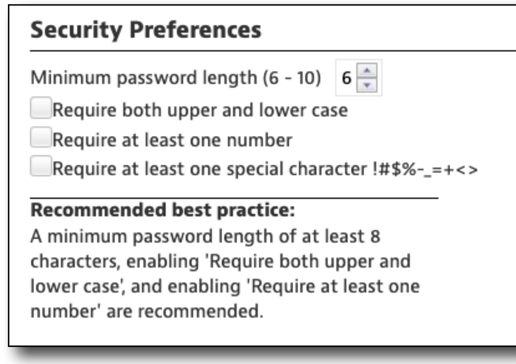
***Only StrataSync administrators or users with permission can make changes to System Settings, as they are site wide.***

## Security

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

This feature allows you to set up password strength requirements.

When finished, click **Done**.

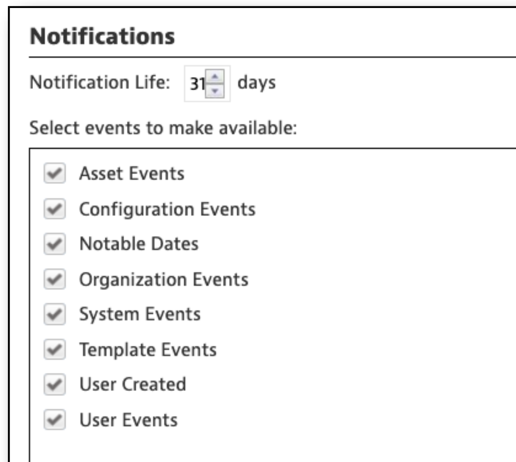



## Notifications

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**.

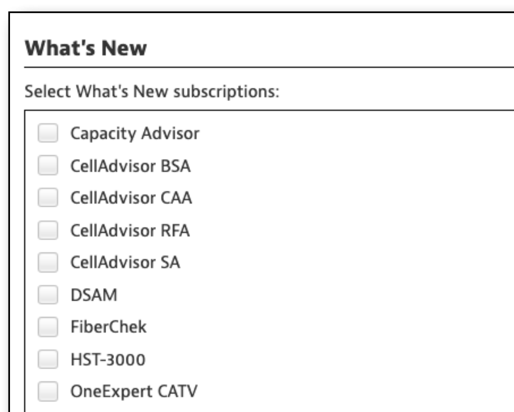



## What's new

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**.



## Lease company

Select **Lease Company** to bring up the Lease Company section.

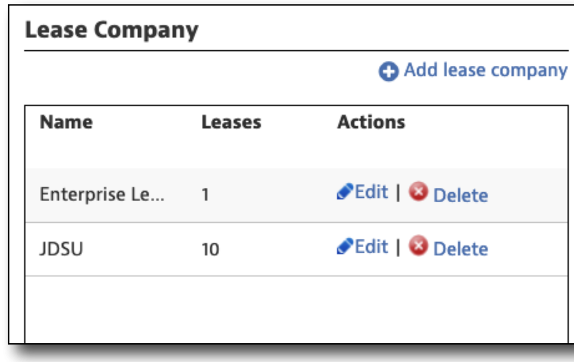
This feature allows you manage lease company information for associated assets.

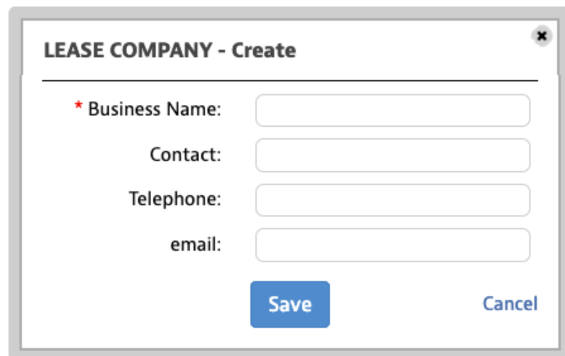
To add a lease company, click **Add lease company** in the upper right.

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**.



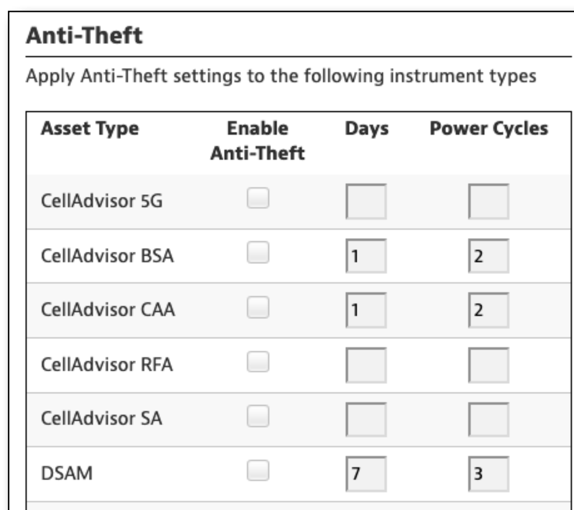

## Anti-Theft

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.

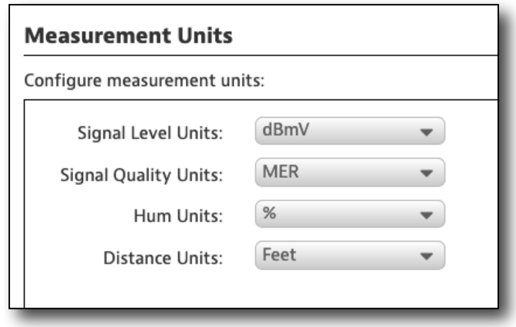
When finished, click **Done**.

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



## Measurement units

Select **Measurement Units** to bring up the Measurement Units section.

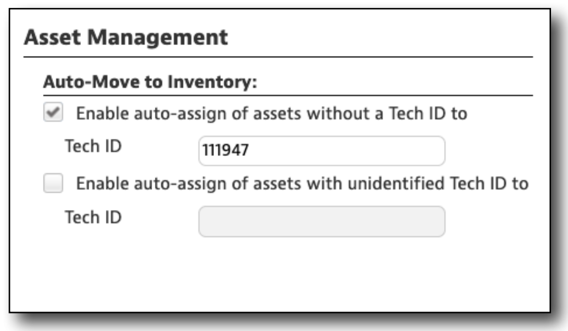



This feature allows you to choose how instrument measurement files and configuration editors are shown in StrataSync system wide.

When finished, click **Done**.

## Asset management

Select **Asset Management** to bring up the Asset Management section.




This feature allows a new asset to bypass the holding bin and move directly to the inventory, assigned to a specified Tech ID.

**Note:** You will need to create the Tech ID if it doesn't already exist in StrataSync.

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

Choose one of these options:

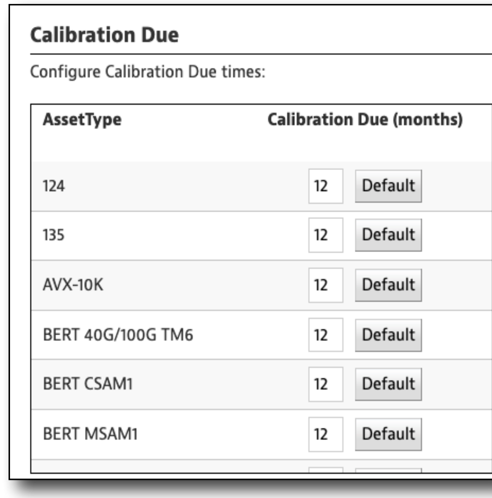
- **Enable auto-assign of assets without a Tech ID** – Assets that have not been assigned a Tech ID are automatically assigned to the specified Tech ID
- **Enable auto-assign of assets with unidentified Tech ID** – Assets with unidentified Tech IDs get auto assigned to the specified Tech ID

When finished, click **Done**.

For more details, see *"Unidentified Tech ID role" on page 207.*

## Calibration due

Select **Calibration Due** to bring up the Calibration Due section.

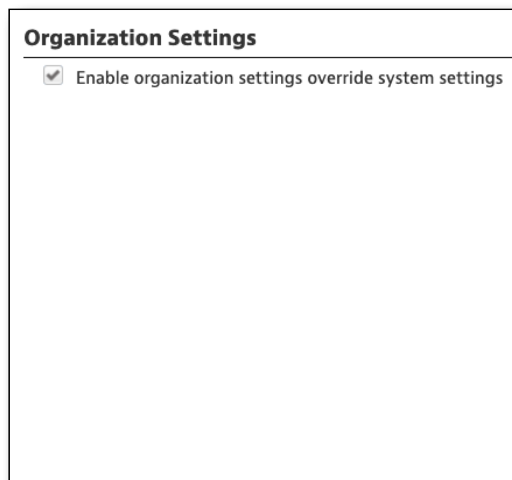



This feature allows you to set calibration intervals for assets system wide.

When finished, click **Done**.

## Organization settings

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

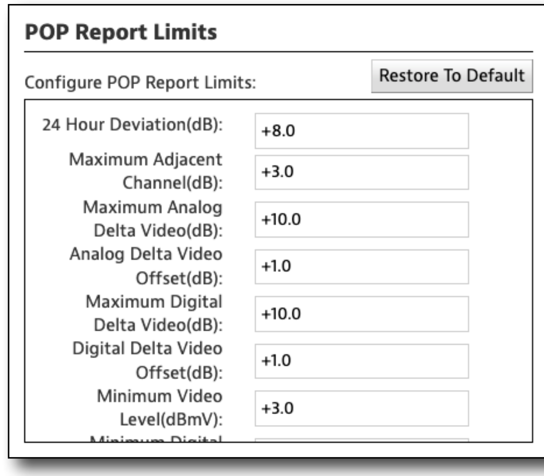



This feature allows suborg owners to set some of the system settings for their own organizations.

When finished, click **Done**.

## POP report limits

Select **POP Report Limits** to bring up the POP Report Limits section.

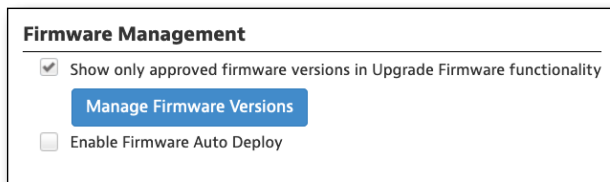



This feature allows you to configure POP report limits.

When finished, click **Done**.

## Firmware management

Select **Firmware Management** to bring up the Firmware Management section.



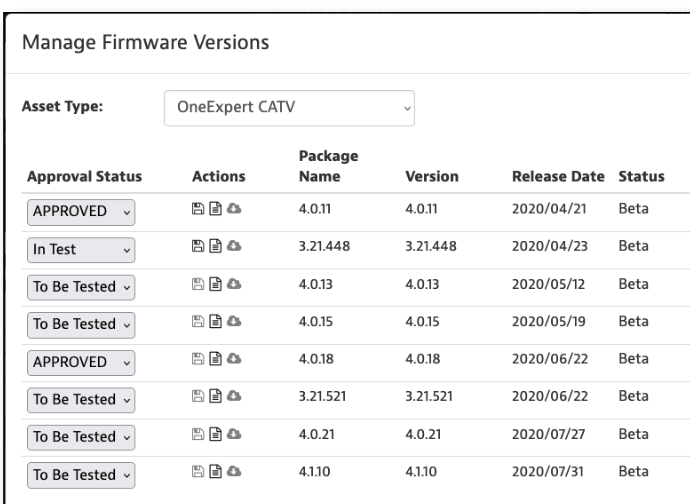

This feature allows you to manage firmware versions for your assets, including options to only show approved firmware and to auto deploy the firmware.

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.

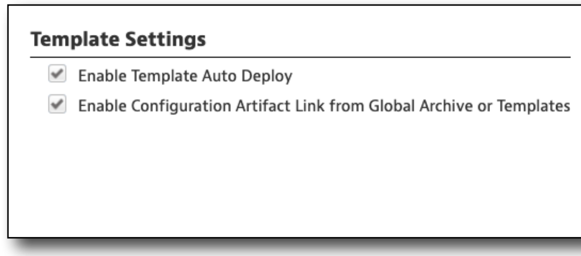
Select **Manage Firmware Versions** and choose an asset to see available firmware. For details, see *"Managing firmware versions" on page 40.*

When finished, click **Done**.




| 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:

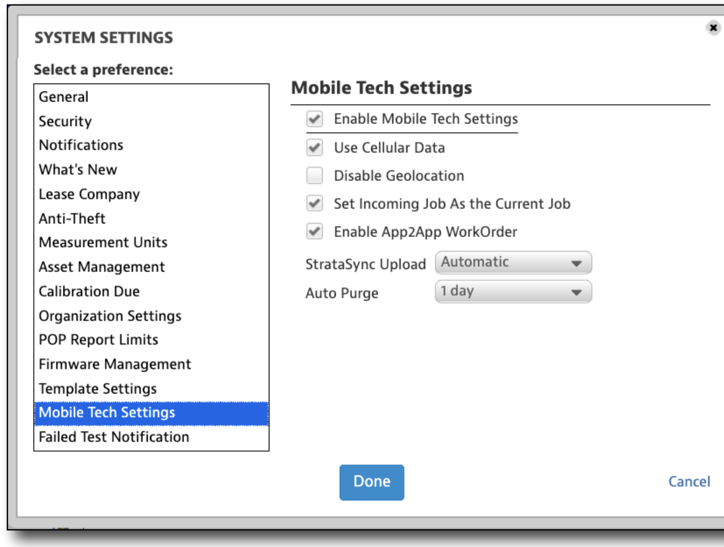
- **Enable Template Auto Deploy** – Auto deploy templates to assets in an organization and its suborgs you have set up for specific asset types
- **Enable Configuration Artifact Link from Global Archive or Templates** – Allow parent and child artifact links to be synchronized when changes are made

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.

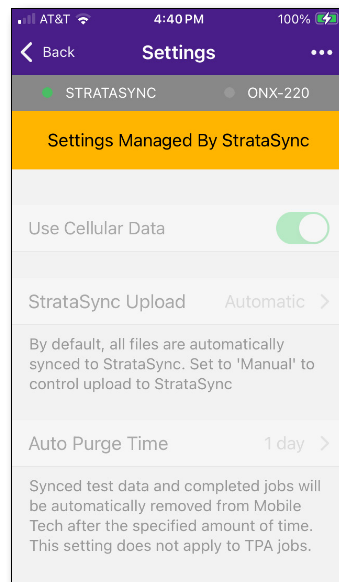



This feature allows you to consistently configure the VIAVI Mobile Tech app across a large fleet of technicians for accounts configured for this capability. The settings are applicable for all Mobile Tech users associated with the StrataSync account.

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 gelocation 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

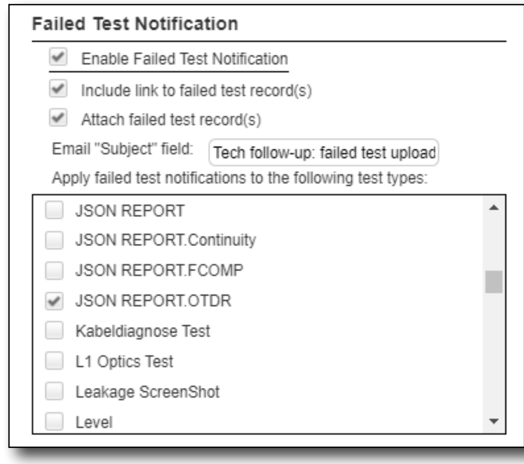
When finished, click **Done**.

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.

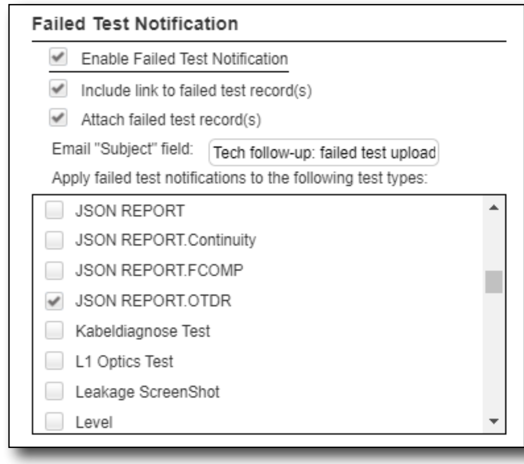
This feature allows technician supervisors, or any StrataSync user with the 'Edit Users' permission and associated with the same organization as the technician (or a parent organization), to monitor one or more technicians for failed tests of configured test types.

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.




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.

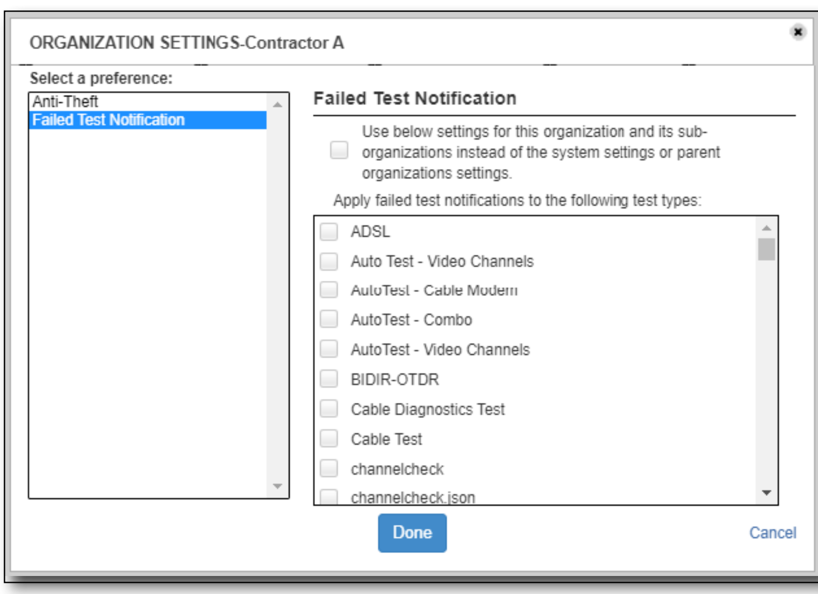
In addition, the email subject field can be configured from the default “Failed result uploaded”.

### *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.

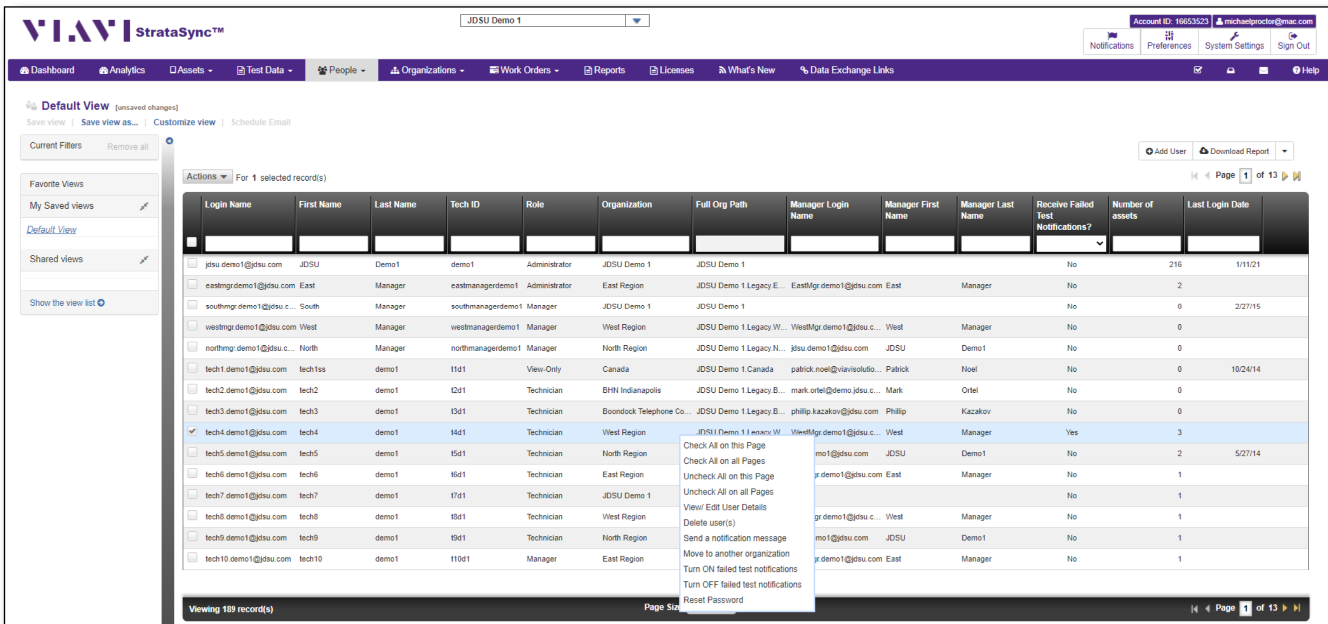
As some customers represent large organizations which manage multiple sub-organizations managing different technician workgroups with different responsibilities and testing different technologies, the test types which trigger email notifications can be additionally configured at the organization level (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.



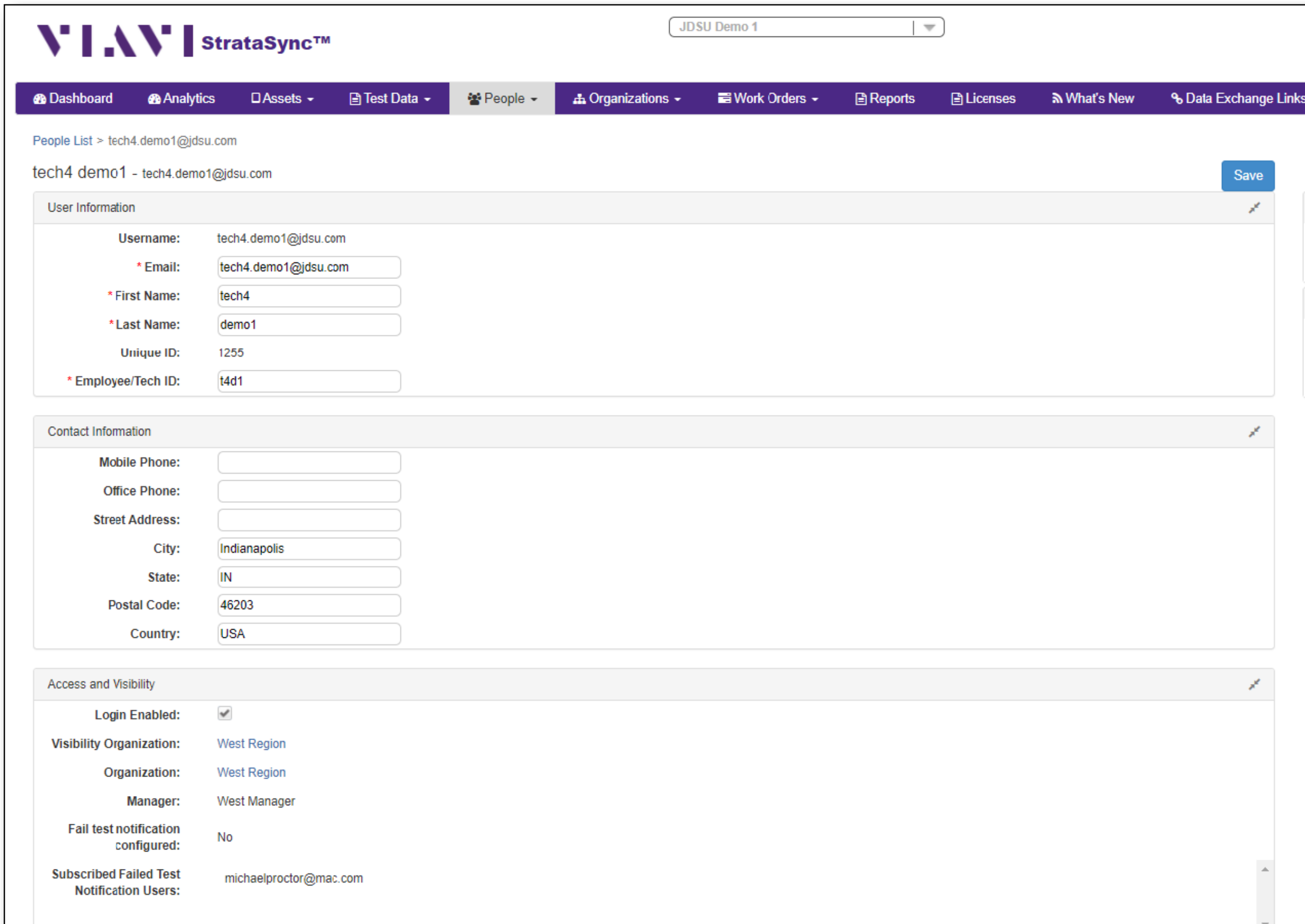

*People tab – Monitoring technicians failed tests*

**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 you 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).

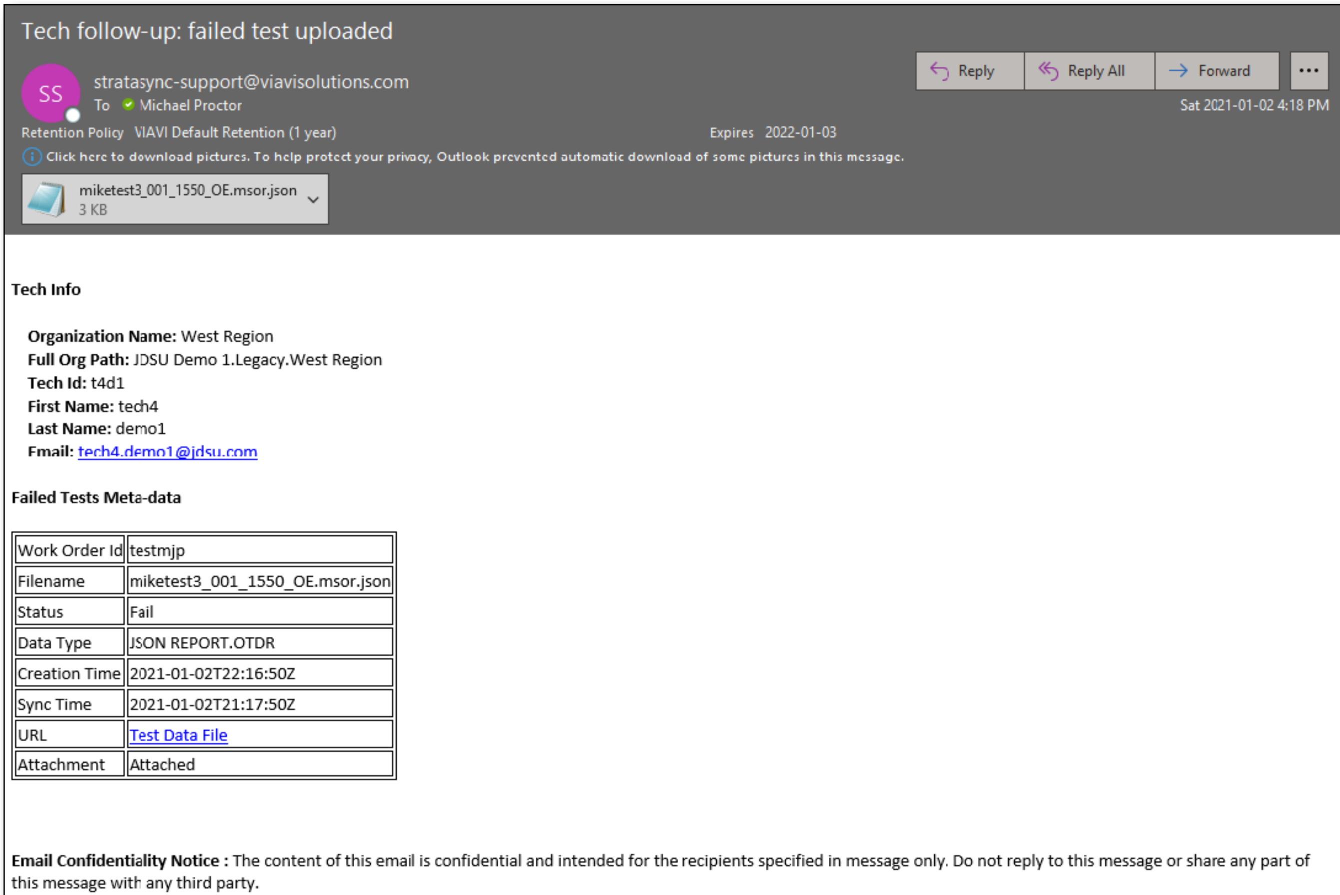
In the example below, while the admin user ‘jdsu.demo1@jdsu.com’ is not monitoring techician ‘t4d1’, as the ‘Fail test notification configured’ value is “No” under ‘Access and Visibility’, the admin user can see that the manager ‘michaelproctor@mac.com’ has subscribed to monitor this technician (under the ‘Subscribed Failed Test Notification Users’ value).




*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

SS stratasync-support@viavisolutions.com

To Michael Proctor

Reply Reply All Forward ...

Sat 2021-01-02 4:18 PM

Retention Policy VIAVI Default Retention (1 year) Expires 2022-01-03

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 |

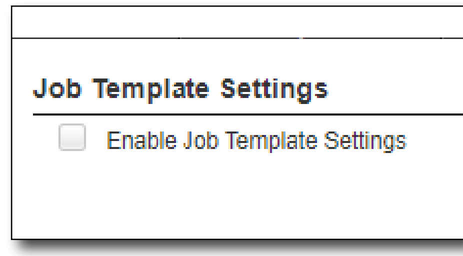
**Email Confidentiality Notice :** The content of this email is confidential and intended for the recipients specified in message only. Do not reply to this message or share any part of this message with any third party.

**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.



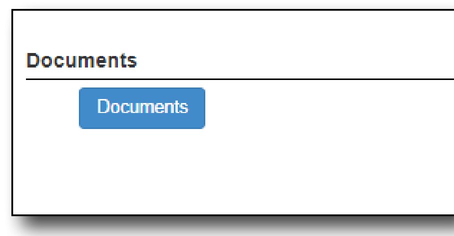

This feature allows you to assign and modify job templates for the the entire account if configured for this capability.

When finished, click **Done**.

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

## Documents

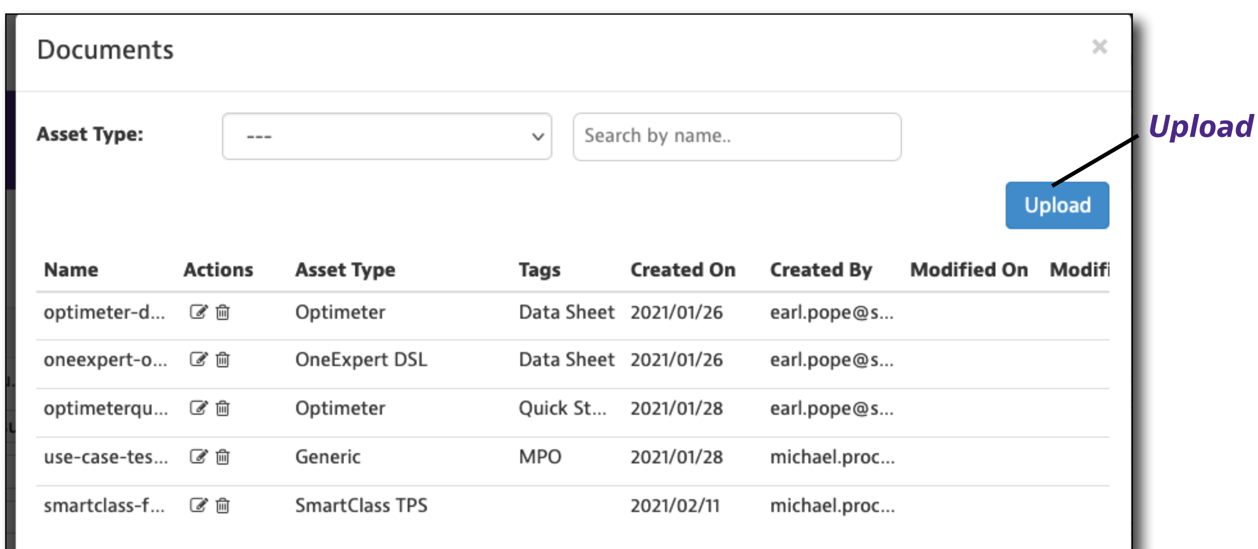
Select **Documents** to bring up the Documents section.




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**.




*Document list in StrataSync*

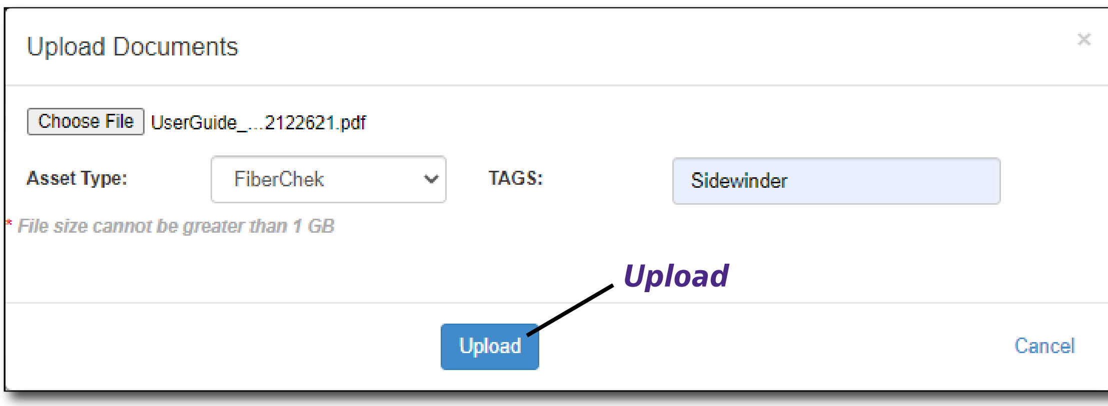
Choose a file to upload, as well as select a specific instrument (asset) type from the dropdown (or select 'Generic'), and also provide tags to further aid document searching. Select **Upload** again to upload your document.

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.

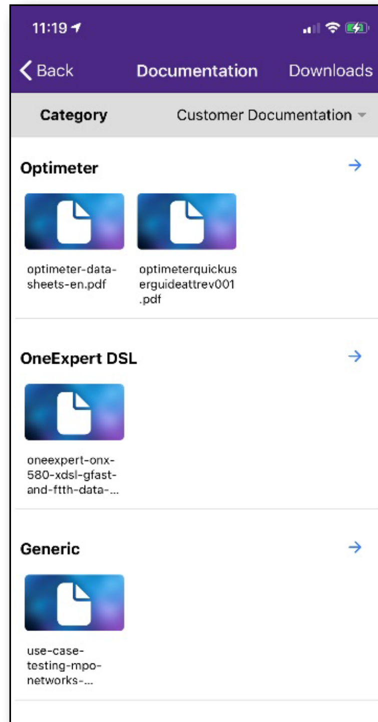
When finished, close the document list and click **Done**.




*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.

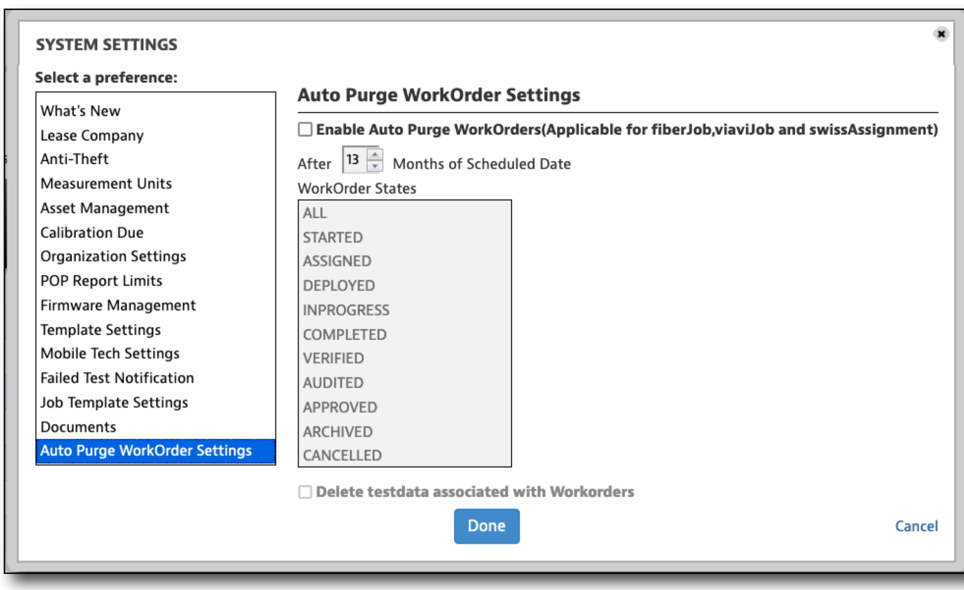
This feature allows support for monthly (runs on the 1st day of every calendar month) automatic purging (deletion) of work orders based on a number of months from each work order's schedule date. This feature applies to CDM 2.1 work orders only.

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**.




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.

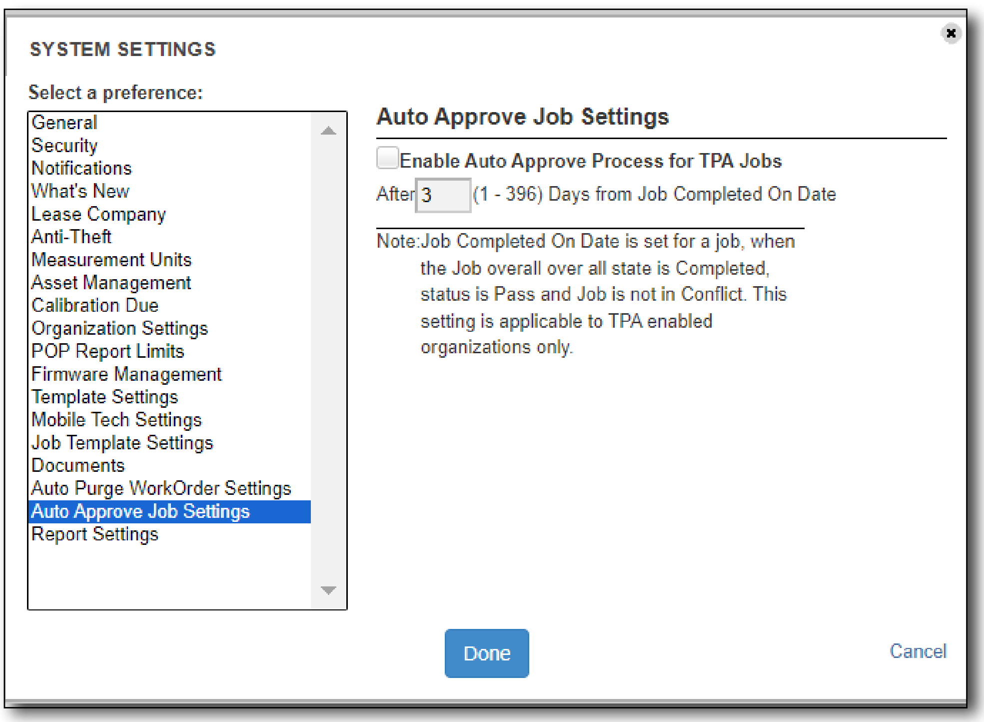
**Note:** Job Completed On Date is set for a job, when the Job overall state is Completed, status is Pass, and Job is not in Conflict. This setting is applicable to TPA enabled organizations only.

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.

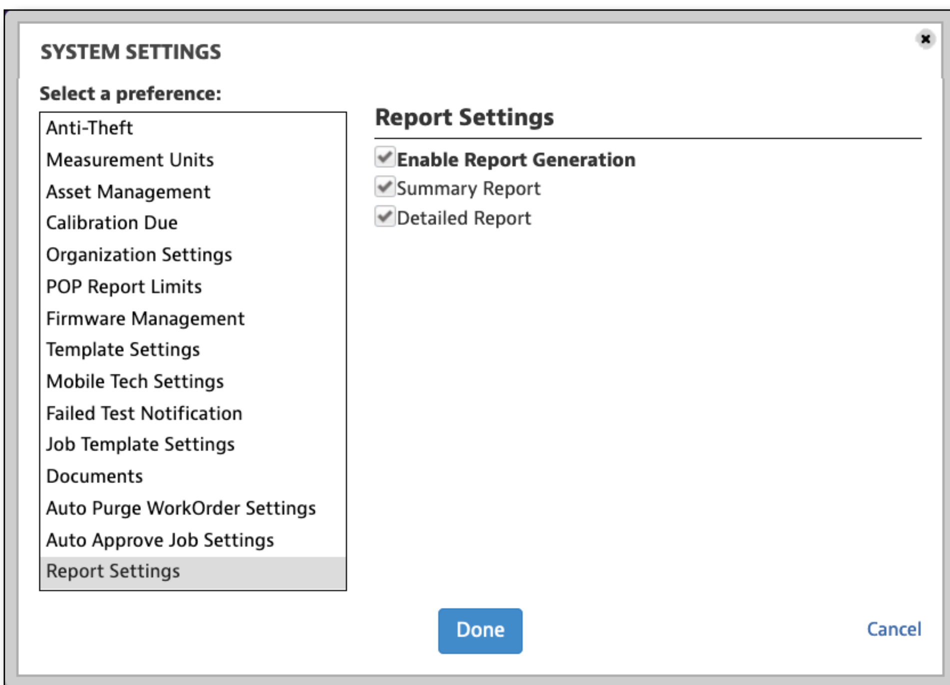
The Detailed PDF report concatenates any test results uploaded from VIAVI test instruments associated with the approved job which are PDF-formatted. Test results in other formats are not included.

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.*



13

# Using the Mobile Tech App

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

# Using the Mobile Tech app

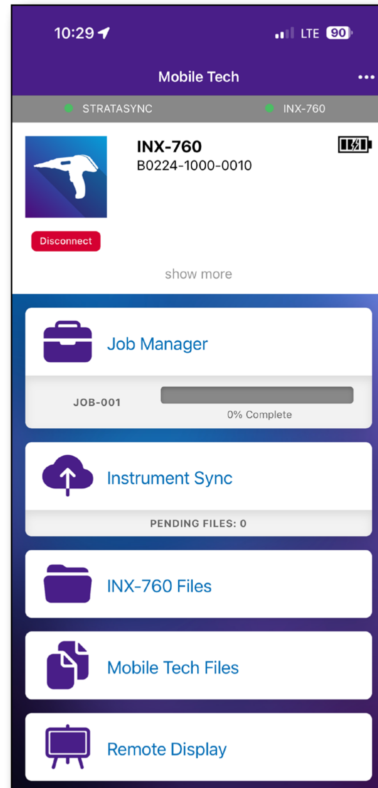
The VIAVI Mobile Tech app is a technician productivity app that automates synchronization with StrataSync for the connected VIAVI instrument.

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 dowloaded 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

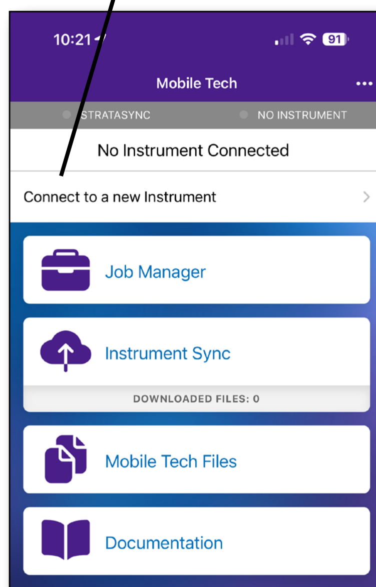
VIAVI test instruments connect with the Mobile Tech app wirelessly via WiFi or Bluetooth, depending on the instrument.

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

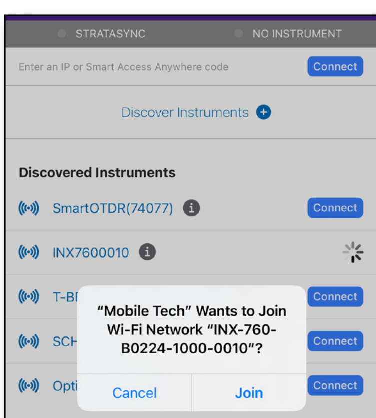
1. Power ON the test instrument.
2. Launch the **Mobile Tech app** on your mobile device.
3. Press **Connect to a new Instrument** and follow one of the below methods:
   - Discovered VIAVI instruments will be displayed on the screen. Find the instrument name and serial# for the instrument you want to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

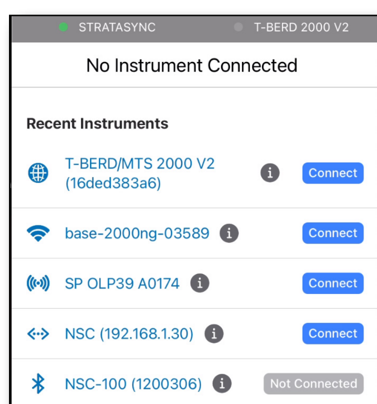
   Note that you may need to accept a pop-up to join the instrument WiFi Access Point (AP).




**Icons**

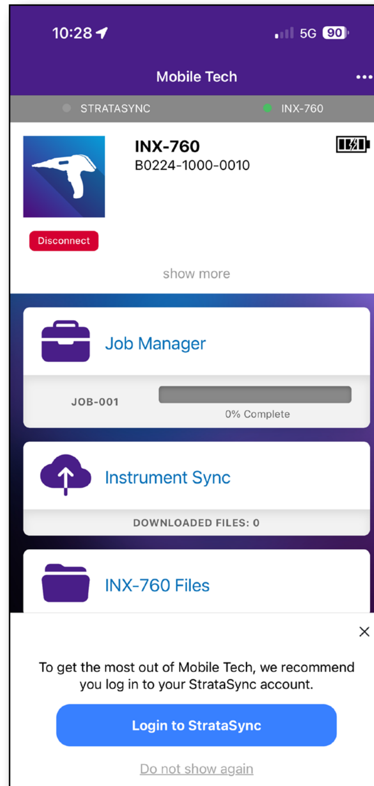
- **WiFi**
- **Bluetooth Low Energy (BLE)**
- **Bluetooth**
- **Wired**
- **Smart Access Anywhere (SAA)**



- 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.

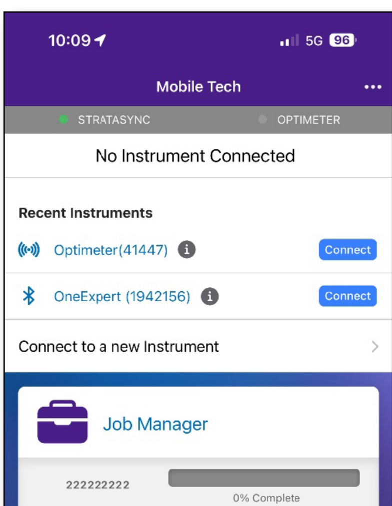



- Enter the IP address of instrument in top bar and press the **Connect** button. You must be directly connected with or on the same local network as the instrument to use this method.
- Enter the Smart Access Anywhere (SAA) code from instrument and press the **Connect** button. The VIAVI instrument 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.

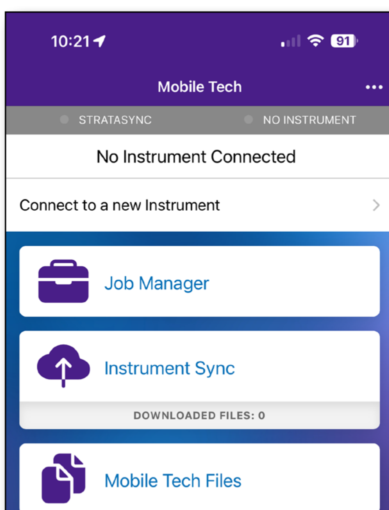
4. You will now be connected and be able to view details of the connected instrument.

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

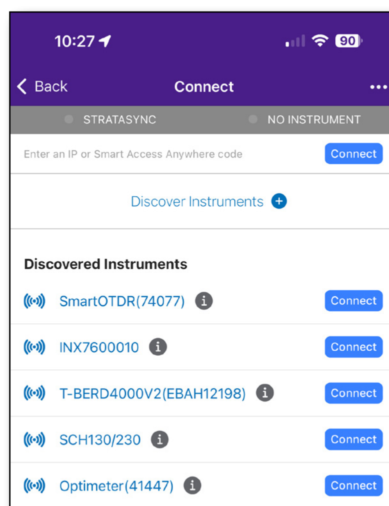
Mobile Tech will automatically reconnect to the last previously connected VIAVI test instrument – note that there is a setting in Mobile Tech settings to disable this, if desired.




**Existing user, showing recent instruments**




**New user, showing no recent instruments**

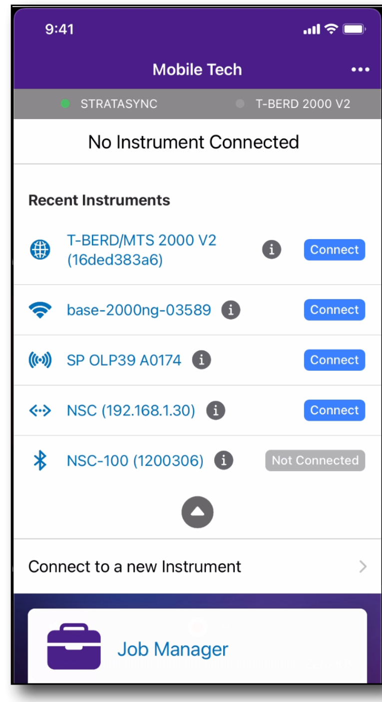



**New user, showing discovered instruments**

## 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*.



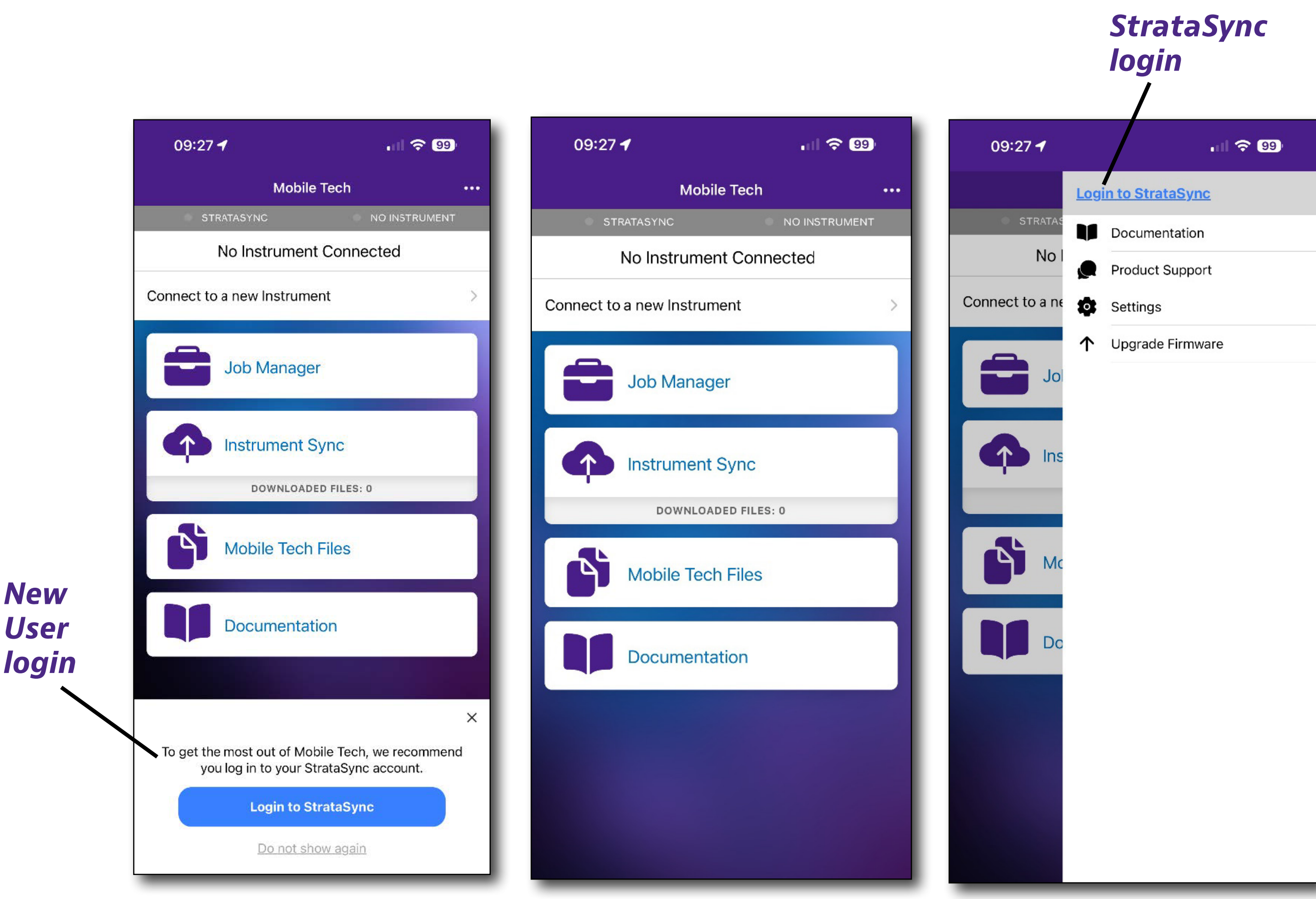
# Logging in to StrataSync

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.

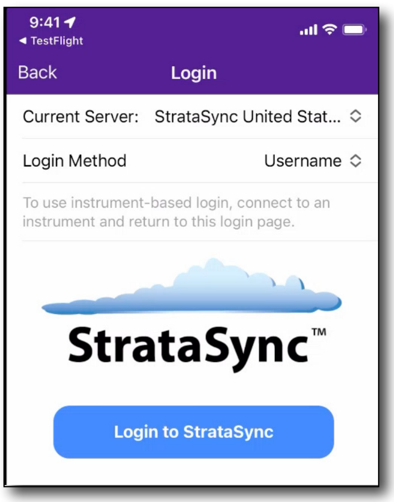
## To log in to StrataSync with username and password

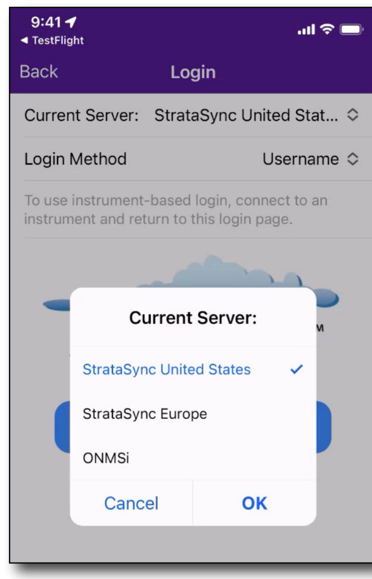
1. Launch the **Mobile Tech app** on your mobile device.
2. Press the **Login to StrataSync** button in the pop-up. If you closed the pop-up:
    - Press the 3 dots in upper right corner of the app
    - Press **Login to StrataSync** at the top of the pullover

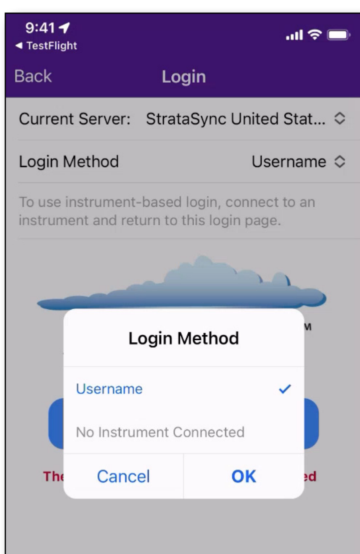


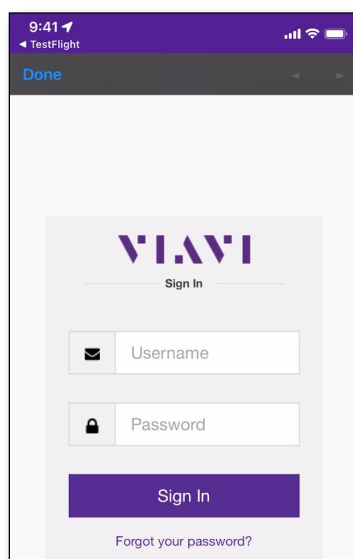
3. In **Current Server**, select your required StrataSync server (**United States** or **Europe**).
4. In **Login Method**, select **Username**.
5. Press the **Login to StrataSync** button.
6. Enter your Username and Password, then press the **Sign In** button. The Mobile Tech Main menu will be displayed.

- If your meter is compatible, you can also log in with your instrument or transfer files in local mode.



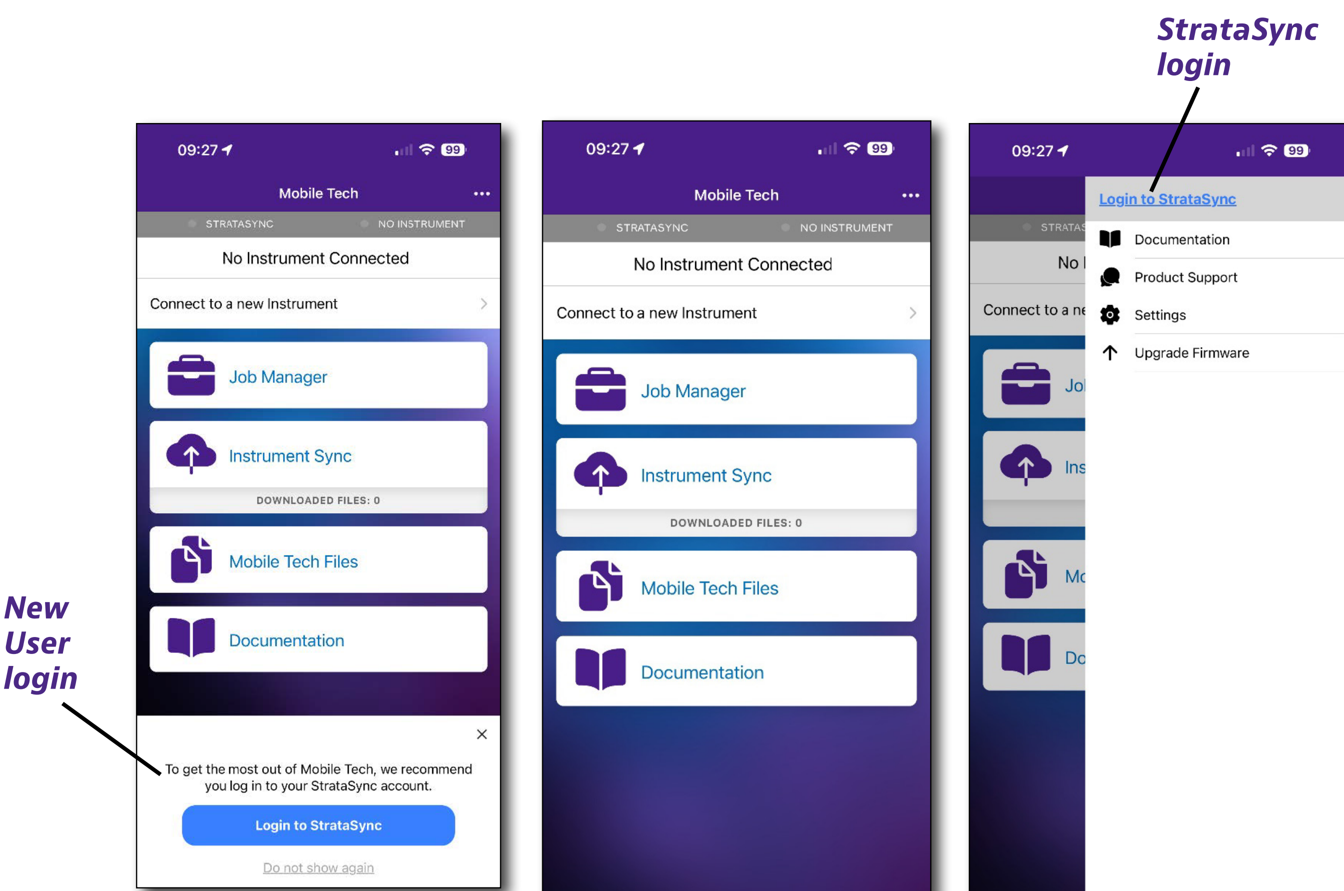



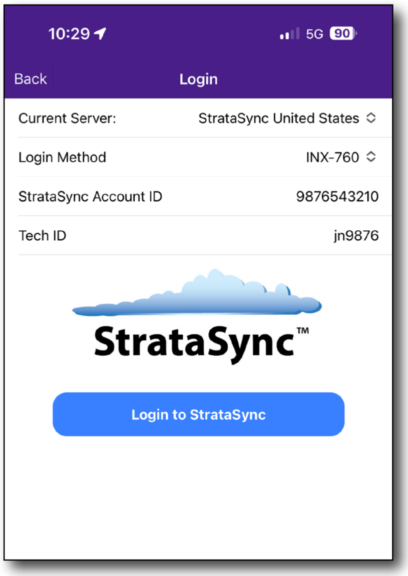
Using compatible VIAVI instruments, a Mobile Tech user can login to StrataSync using the connectivity details already provisioned into their VIAVI instrument (StrataSync Account ID and StrataSync Tech ID). There are several pre-requisites for this functionality:

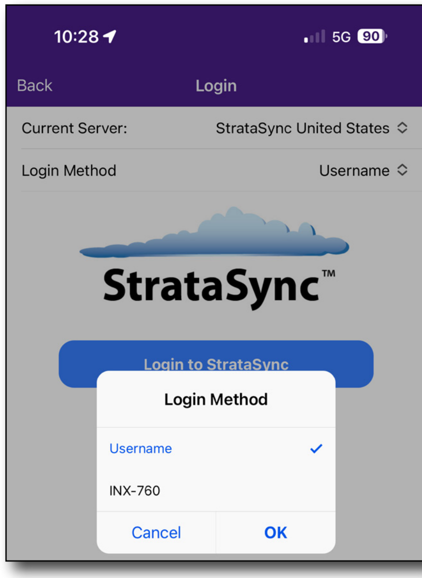
- You must have Mobile Tech version 4.2 or later installed on your Apple iOS or Android device.
- The instrument in question may require a firmware upgrade prior to supporting this capability with Mobile Tech and StrataSync – please review the release notes for your instrument to see if it supports this 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).

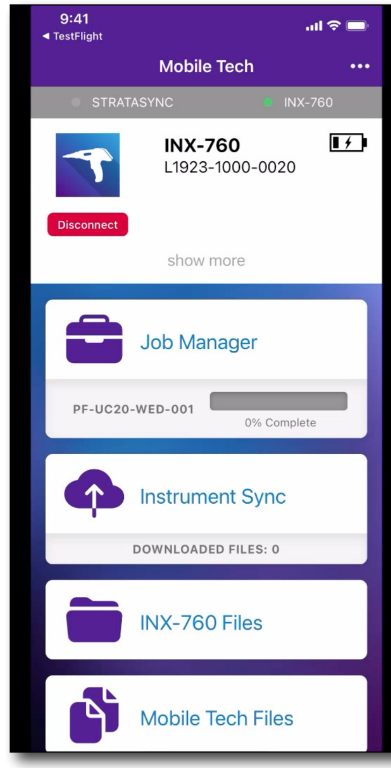
## To log in to StrataSync using your connected instrument

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.




10:29
5G 90
Back
Login
Current Server:
StrataSync United States
Login Method
INX-760
StrataSync Account ID
9876543210
Tech ID
jn9876
StrataSync™
Login to StrataSync


10:28
5G 90
Back
Login
Current Server:
StrataSync United States
Login Method
Username
StrataSync™
Login to StrataSync
Login Method
Username
INX-760
Cancel
OK

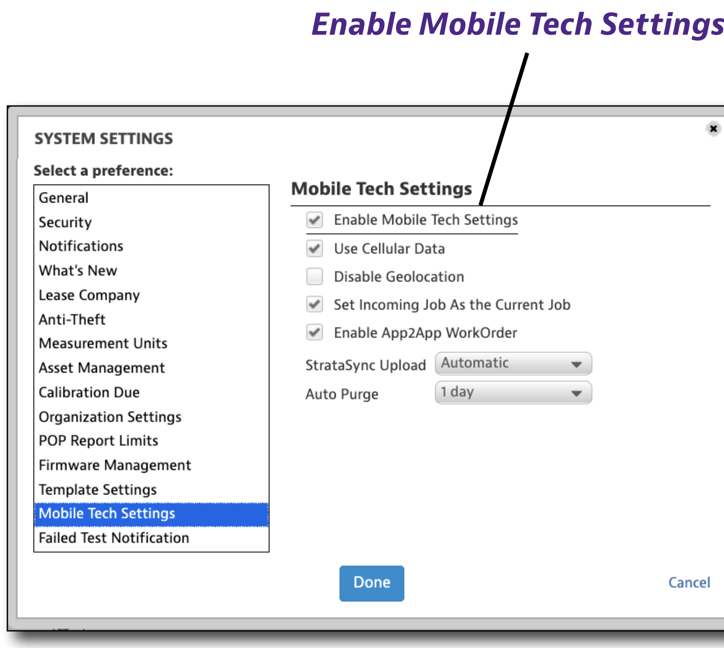

9:41
TestFlight
Mobile Tech
STRATASYNC
INX-760
INX-760
L1923-1000-0020
Disconnect
show more
Job Manager
PF-UC20-WED-001
0% Complete
Instrument Sync
DOWNLOADED FILES: 0
INX-760 Files
Mobile Tech Files

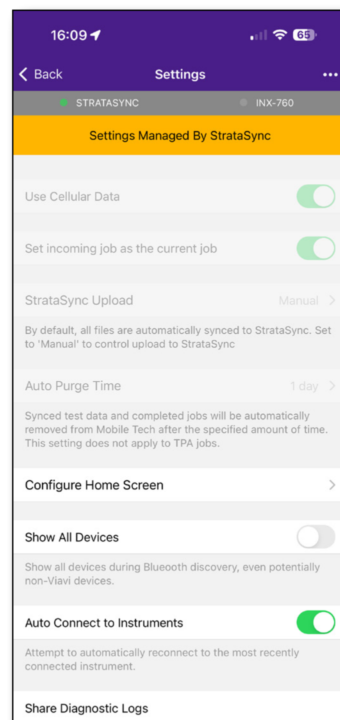
## Mobile Tech centralized settings

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*.




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.

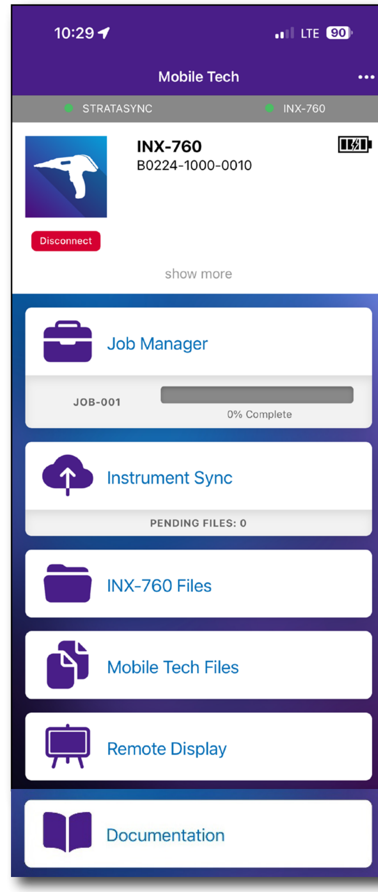
***NOTE:***

***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.***

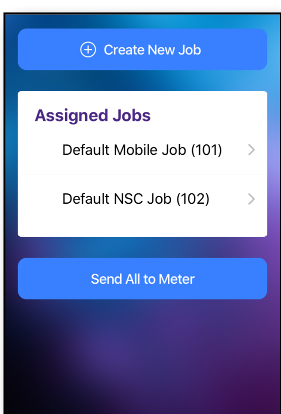
# Mobile Tech overview

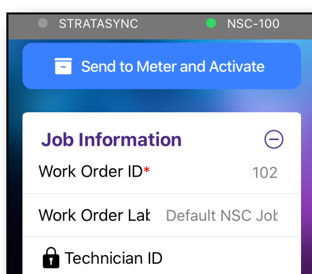
Once connected to a VIAIV instrument and logged into StrataSync, you will see the details of the connected instrument and be able view jobs, sync to StrataSync, manage files on the unit, view documentation, and even contact product support for more information or to request a repair or calibration.

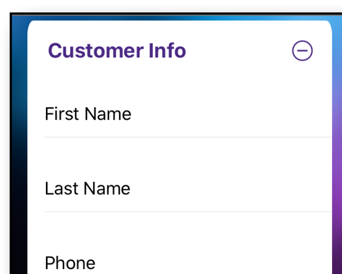
In the connected instrument section near the top of the app, you can click show more to see details on your instrument, including serial number, software version, installed options, and various other information as provided by the instrument.



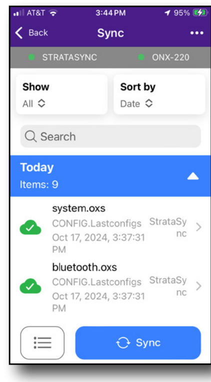

- **Job Manager** – View assigned jobs and job information, create jobs from job templates, track job progress and test results, attach additional tests or information to jobs



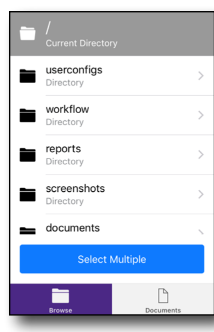



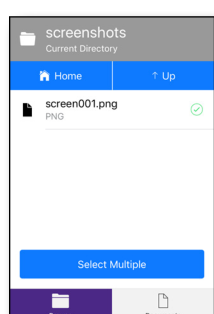
- **Instrument Sync** – View sync history of instrument with StrataSync, including uploaded test results and deployed instrument configuration files. Connected instruments will automatically sync with StrataSync by default; you can manually sync your instrument to StrataSync here as well



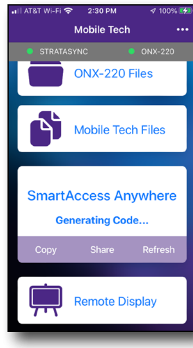

- **Instrument Files** – Instrument file manager where you can view test results and test configurations on the connected instrument, copy files from the instrument into Mobile Tech if desired for app2app sharing, or delete files from instrument



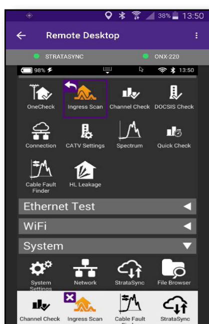

- **Mobile Tech Files** – Manage files that have been copied from an instrument into Mobile Tech locally

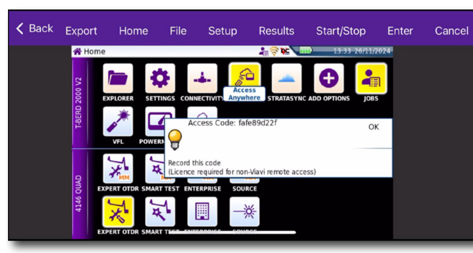


- **Smart Access Anywhere** – View or copy a Smart Access Anywhere (SAA) code from the connected instrument to share with colleagues or technical support for remote access to the VIAVI instrument. The VIAVI instrument must have a network connection to connect to SAA server

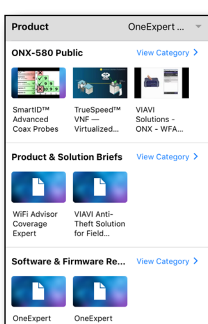



- **Remote Display** – View display and operate the connected VIAVI instrument (if supported by the instrument)



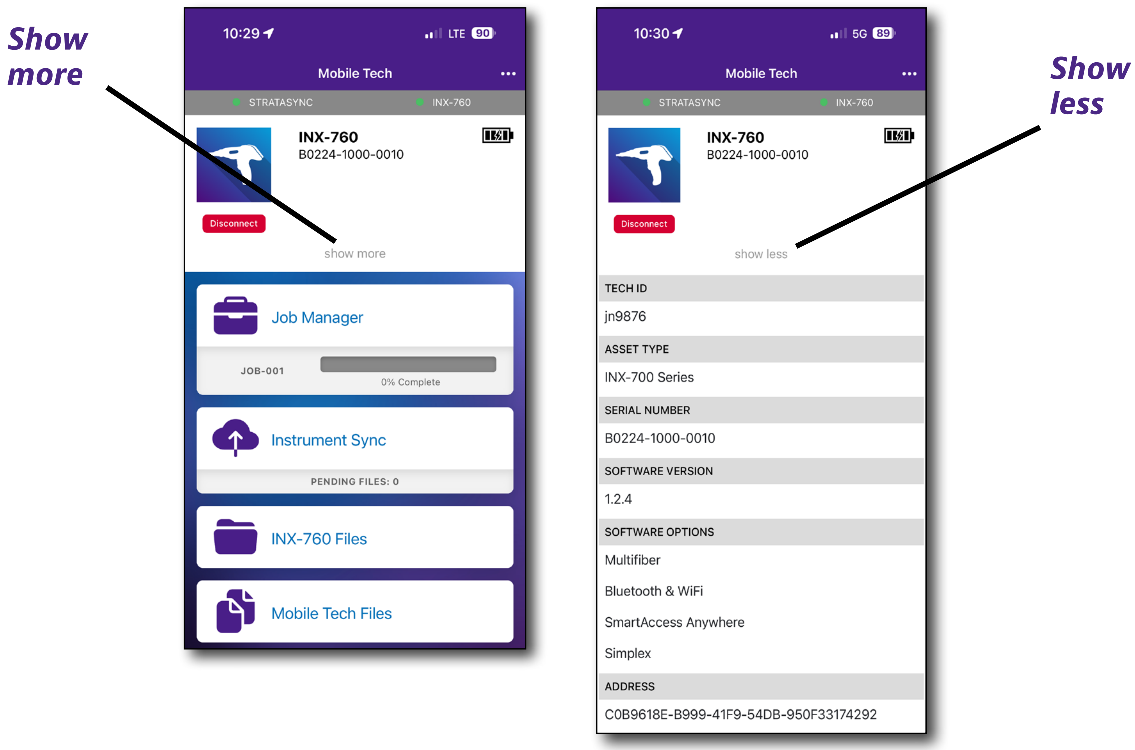

- **Documentation** – View and download various documentation for your instrument, including quick reference guides, how-to videos, applications notes, software release notes, etc.




# 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.



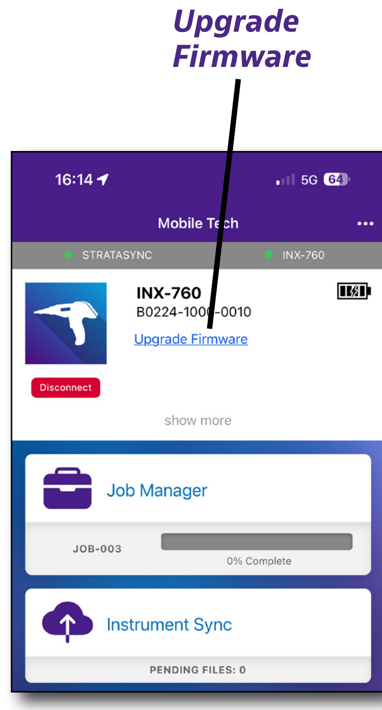

**Showing more instrument info**

# Updating the firmware from StrataSync

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

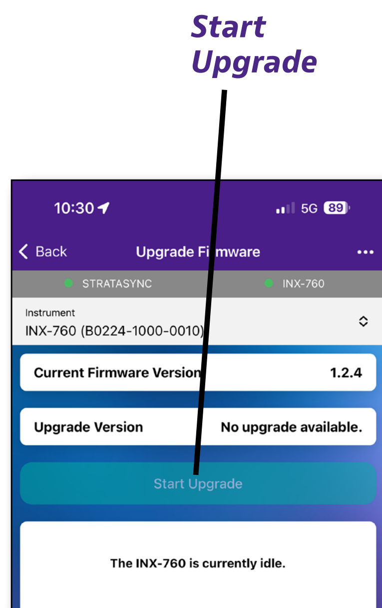
1. Connect the instrument to the power supply to ensure an uninterrupted supply of power during the update.
2. Connect the instrument to Mobile Tech.
3. If a firmware upgrade was pushed to your instrument from StrataSync, you will see a shortcut as **Upgrade Firmware** in the connected instrument information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

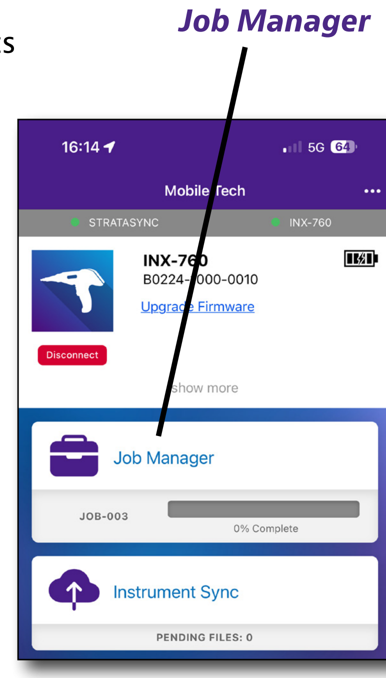
   If you're in an area with poor cellular connectivity, you can connect your phone directly to a WiFi Access Point to have Mobile Tech download the instrument firmware and then connect to the instrument to begin upgrade.

# 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.

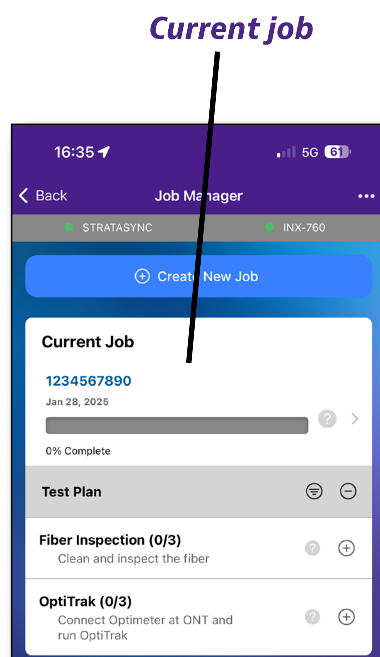
Jobs that are managed and assigned to you from StrataSync will automatically appear in your Job Manager Job List and automatically be removed once job is completed and approved, or if they are reassigned to another tech or deleted.

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



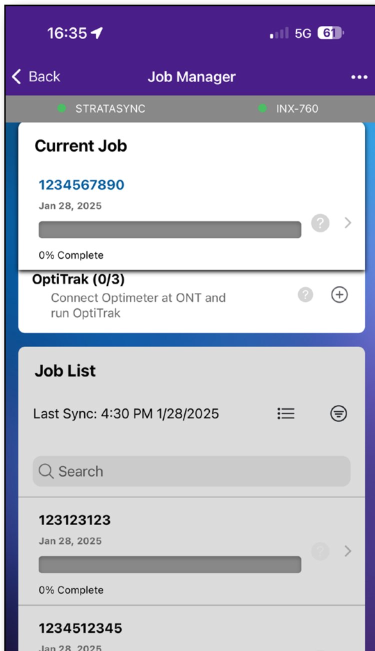

## Managing jobs

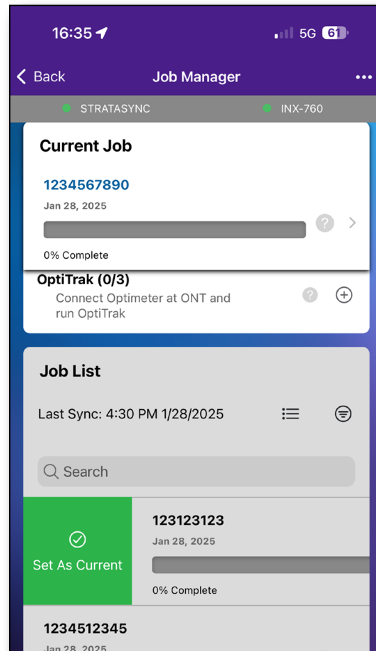
1. From the Main menu, select **Job Manager**. The Job Manager screen appears. If you have an active job, it will be displayed at the top of the screen in the **Current Job** section.
2. Scroll down on the screen to see the **Job List** section which displays all of your assigned jobs. Use the filter 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.

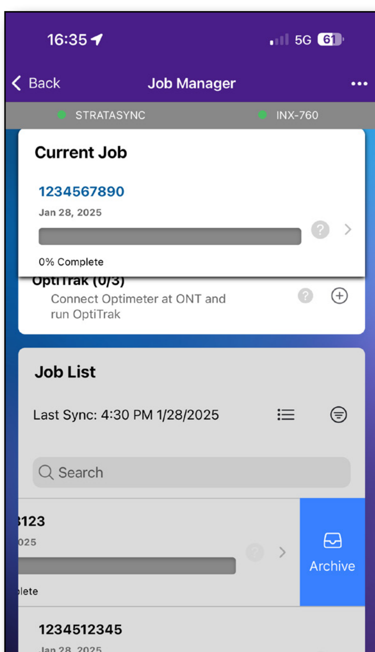


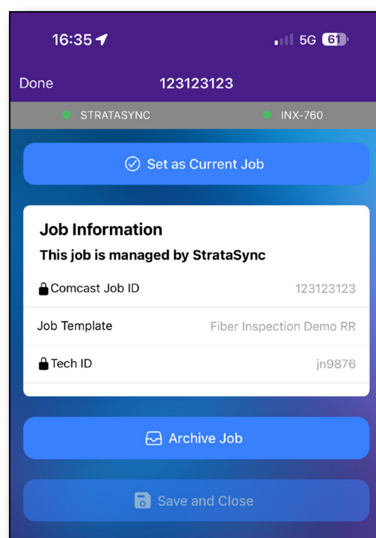
4. Click on any job to view the job details and test plan. Depending on the job attributes fields, you may be able to edit or add information in the job details. You will see buttons to:

   - **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.



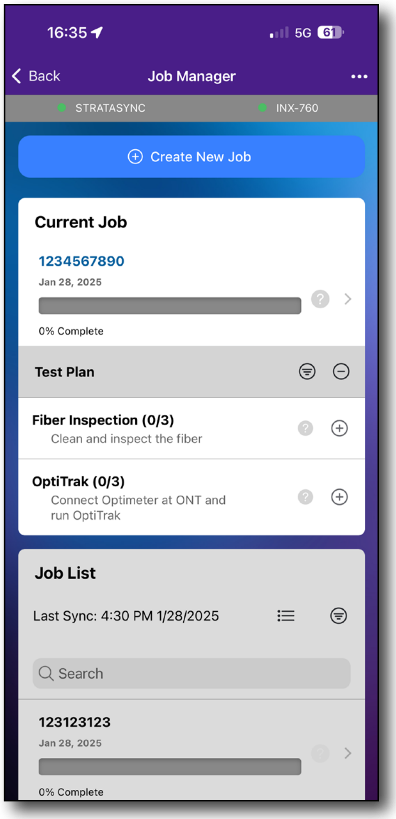



## Current job

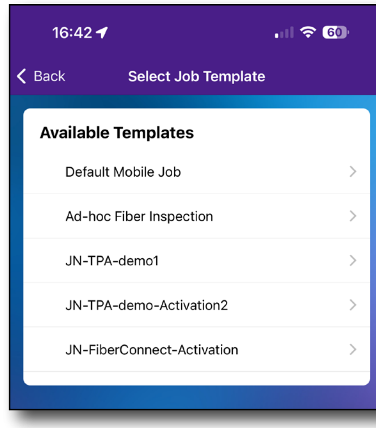
Current Job is displayed at the top section of Job Manager screen where you can easily see the overall job progress, as well as the complete test plan which is comprised of required and optional tests or tasks to be performed.

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.

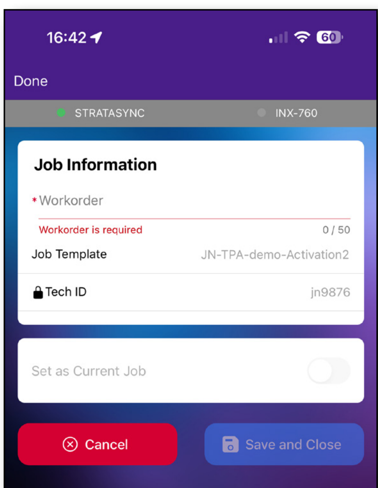


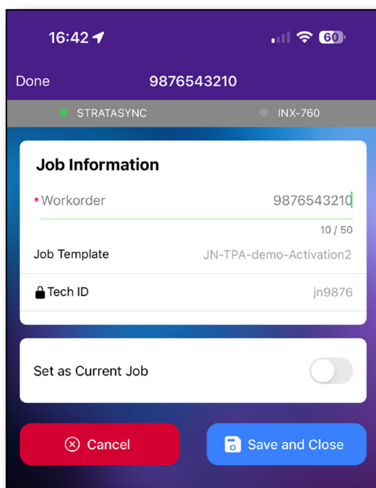
## Creating a job

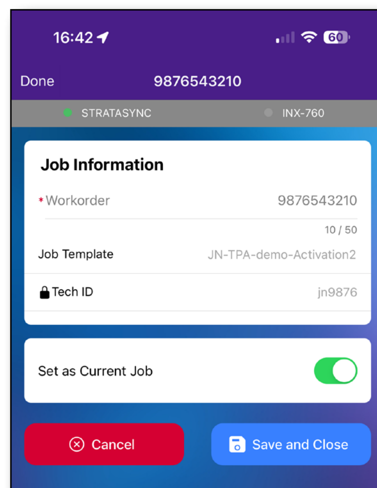
1. From the **Main** menu, select **Job Manager**. The Job Manager screen appears.
2. Select **Create New Job** at the top.
3. A list of available job templates will be displayed. Select the job template that's required for your job and the Job Information screen appears.




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.



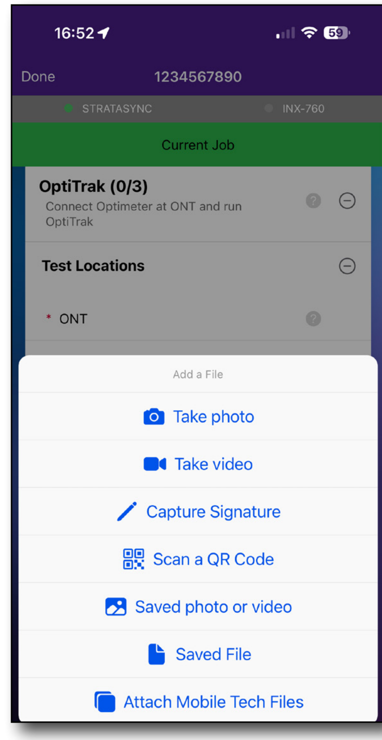



## Adding job files

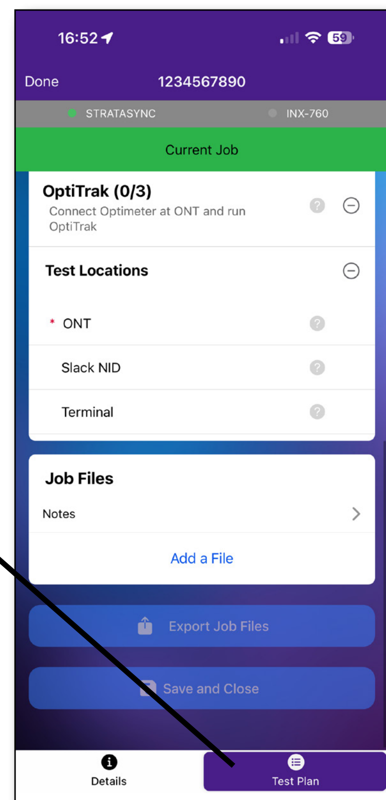
You can add job files to the current job, including any file from your mobile device or files saved in the Mobile Tech files.

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.



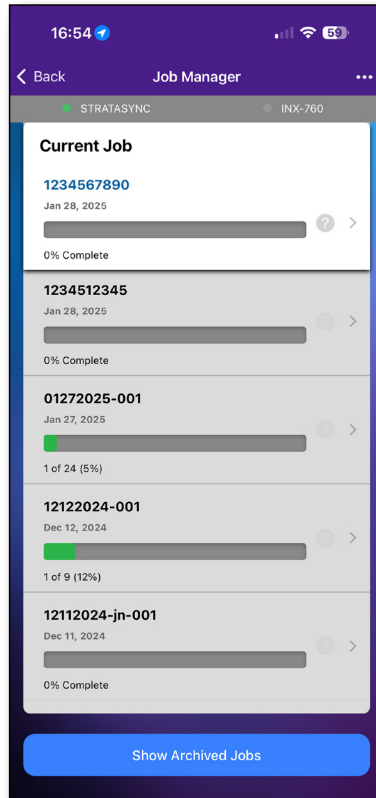

*Test Plan tab*

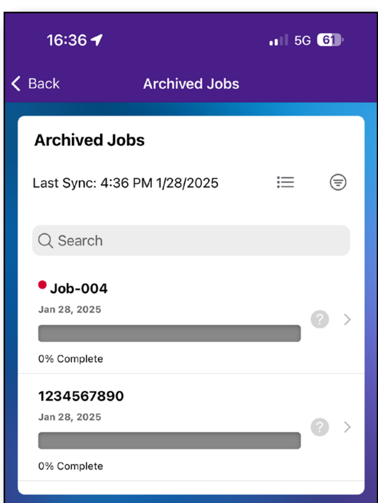


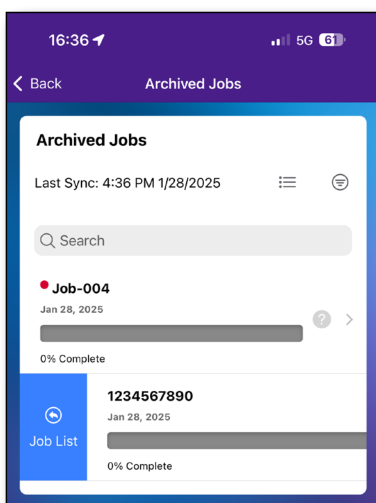
## Archived Jobs

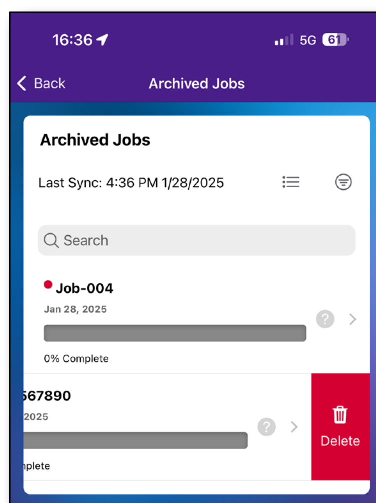
You can archive jobs when you're completed or have no plans to perform additional work on jobs, which will help to minimize your job list for easy viewing.

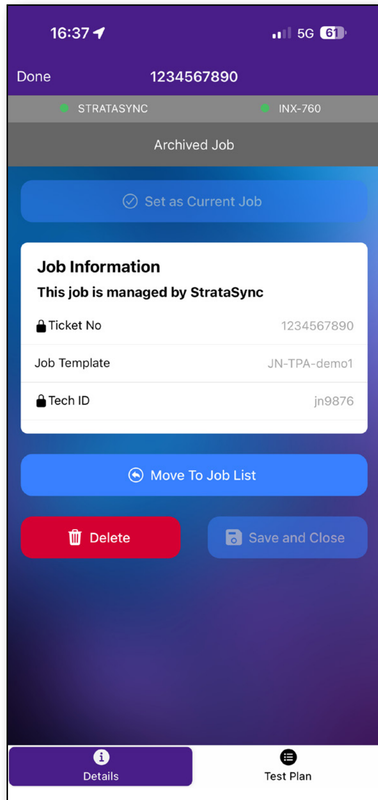
1. You can view and manage archived jobs at any time by:
2. From the Job Manager screen, scroll to bottom of screen and select the **Show Archived Jobs** button.
3. You will now see the **Archive Jobs** list where you can:
    - Click on a job to see the job details and test plan
    - Swipe right to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



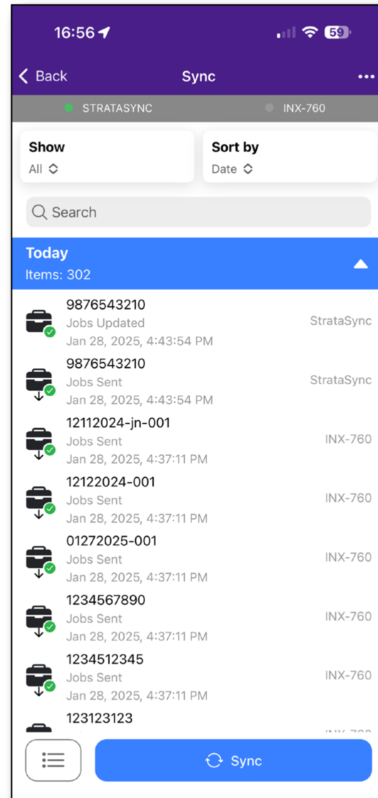

16:37
5G
Done
1234567890
STRATASYNC
INX-760
Archived Job
Set as Current Job
Job Information
This job is managed by StrataSync
Ticket No
1234567890
Job Template
JN-TPA-demo1
Tech ID
jn9876
Move To Job List
Delete
Save and Close
Details
Test Plan

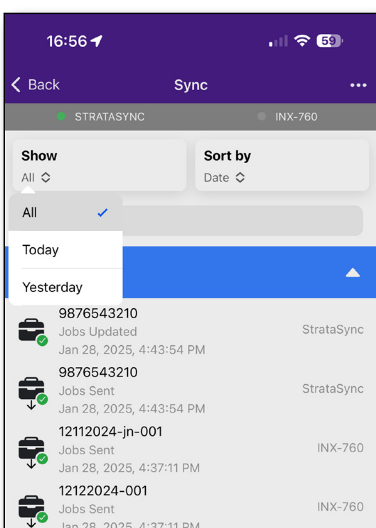
# Instrument Sync

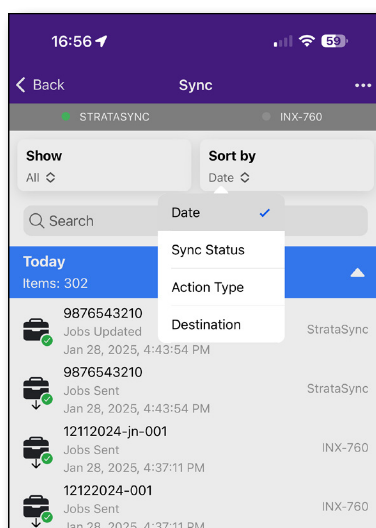
The Instrument Sync section allows you to view sync history of instrument with StrataSync, including uploaded test results and deployed instrument configuration files. Connected instruments will automatically sync with StrataSync by default; you can manually sync your instrument to StrataSync here as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



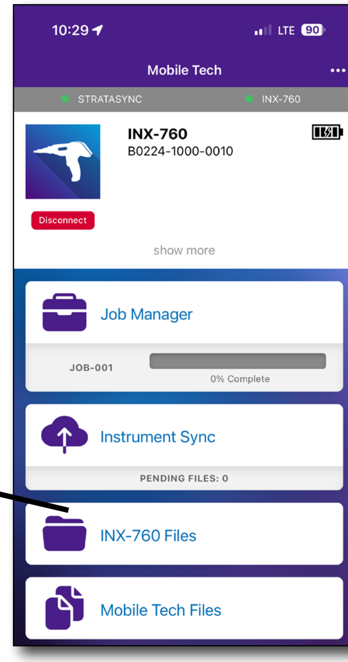
### *Sync icons*


- **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
- **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
- **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.




***INX-760 Files***

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

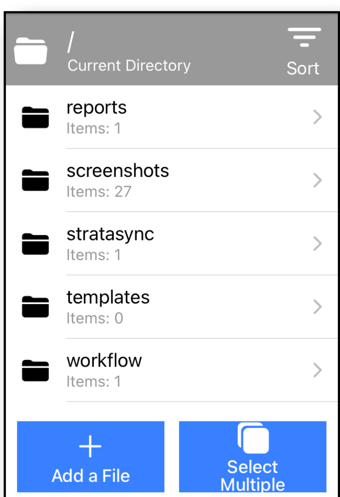
   Here you will see the following directories:

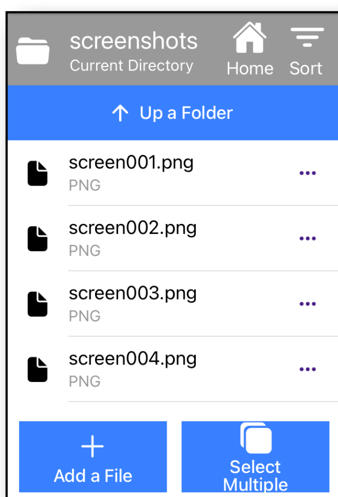
   - Reports
   - Screenshots
   - Templates
   - Workflow

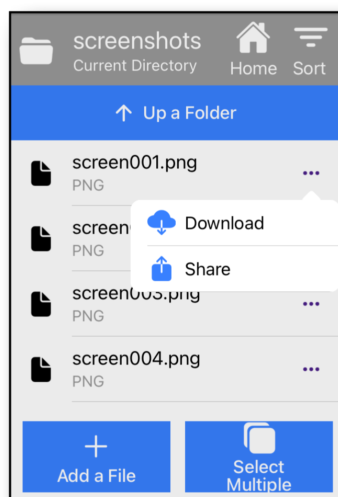
2. Select the directory you want to open. The directory will open and show a list of files.

   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**.



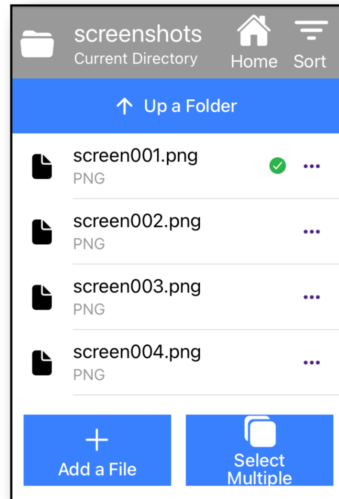



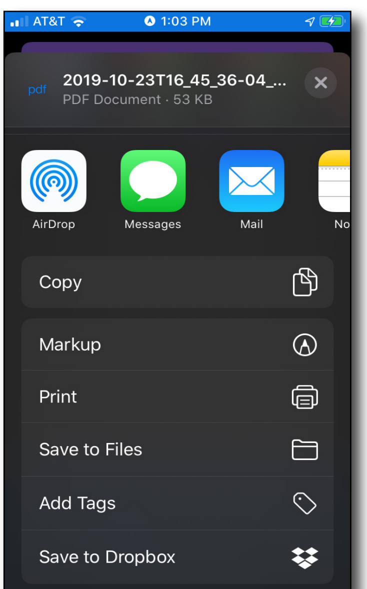
- Once the file is downloaded, it will change to a green checkmark.

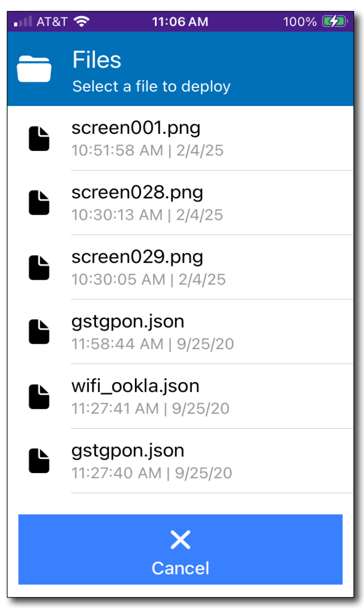
  Files and reports will then be saved to the **Mobile Tech Files** menu. For more info, see the next section.

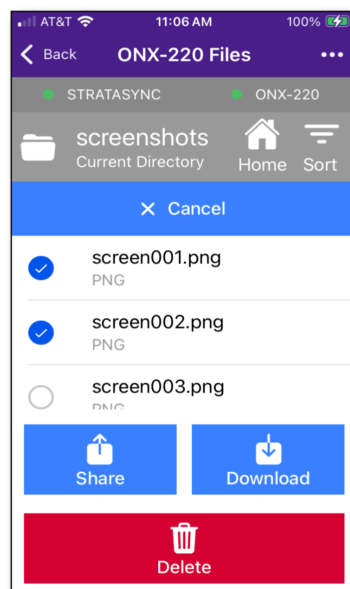
- To share to another app, choose the app you want from the pop-up.




- 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**.



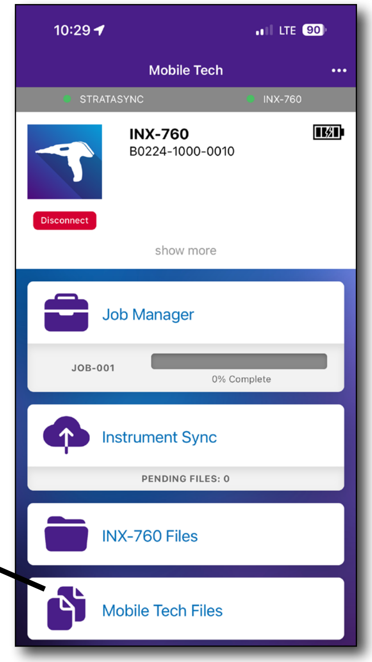
# Mobile Tech Files

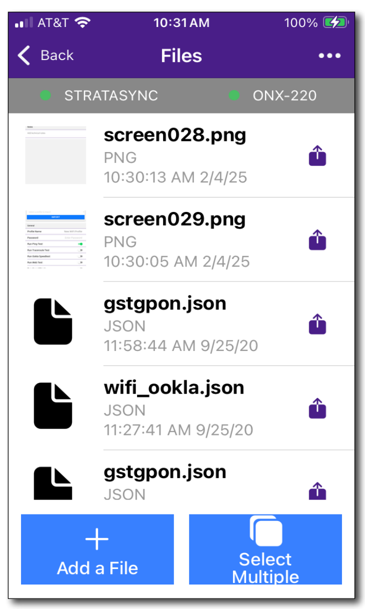
Use the **Mobile Tech Files** menu to manage the files on your mobile device, deploy to the OneExpert, upload to StrataSync, or export to another app on your device, such as text or email.

When you download files and reports from the OneExpert to save to your device, they will apper 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***

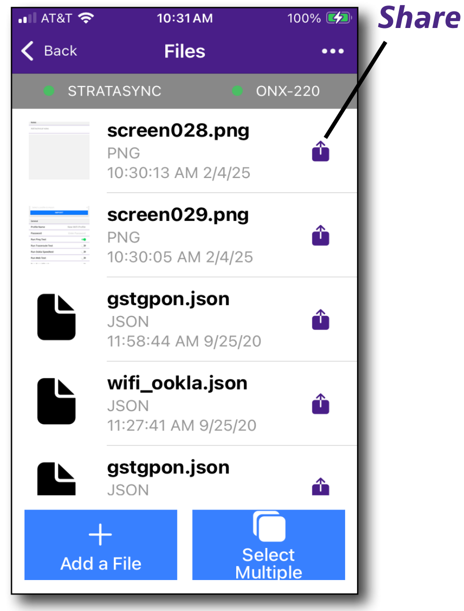


2. Select **Share** to the right of the file you want to send. A pop-up will appear with the following options:

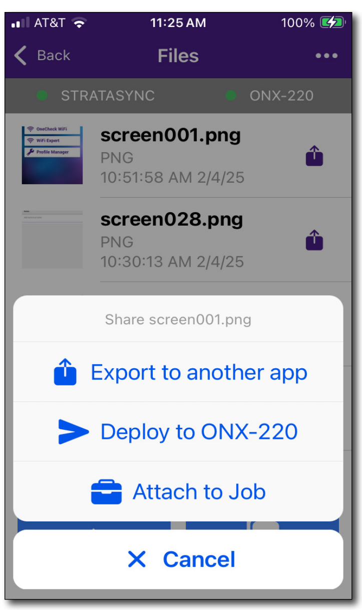
    - Export to another app
    - Deploy to Instrument
    - Attach to Job

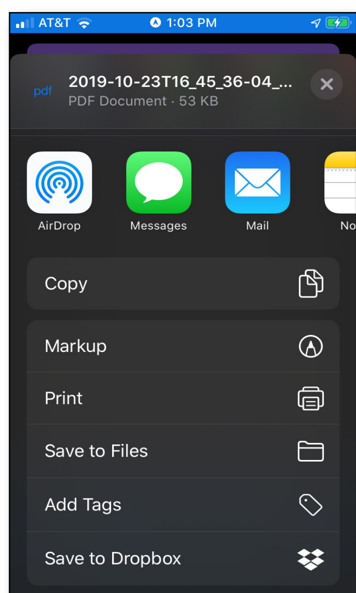
    To return to the Main menu at any time, select **Back** in the upper left.

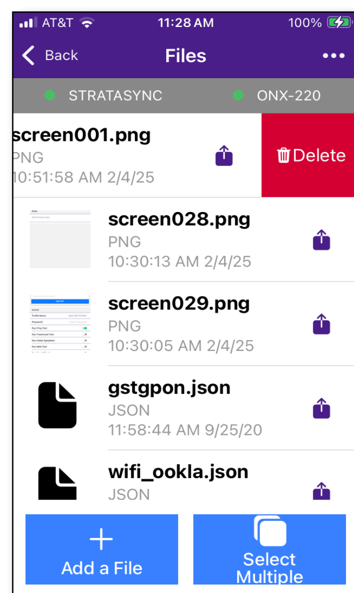



3. Choose the option you want. To export to another app, choose the app you want from the pop-up.

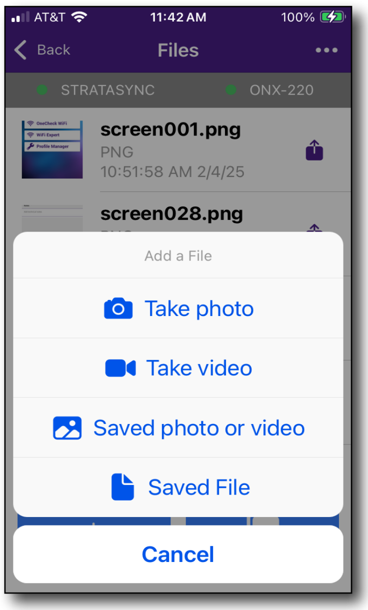
    - To delete a file, select the file and swipe to the left. Then select **Delete**.

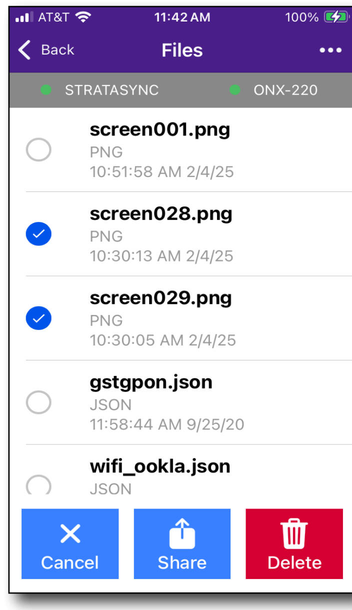


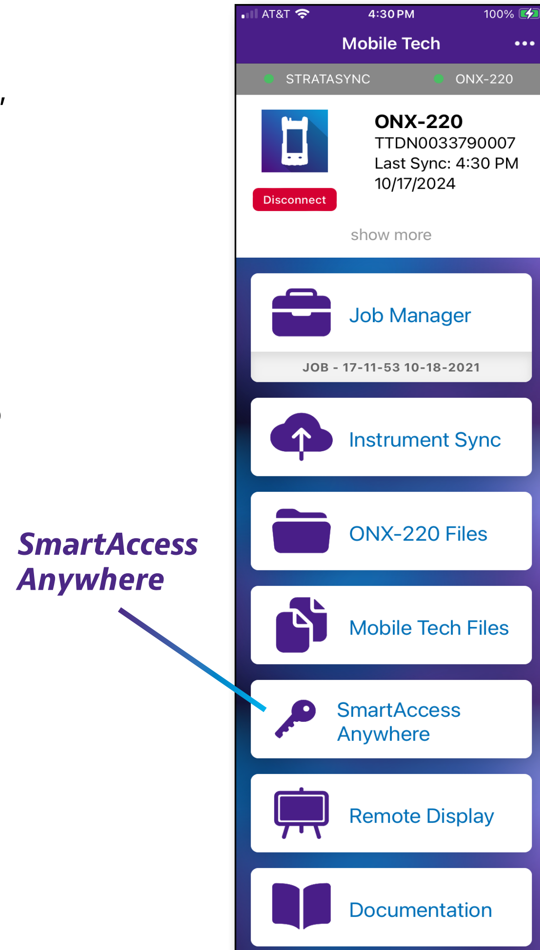
- To add a photo or video to the meter, press the **Add a File** button at the bottom, then choose **Take photo**, **Take video**, **Saved Photo or video**, or **Saved File**.
- To select multiple files, press the **Select Multiple** button at the bottom, and then select the files. Then select **Share**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

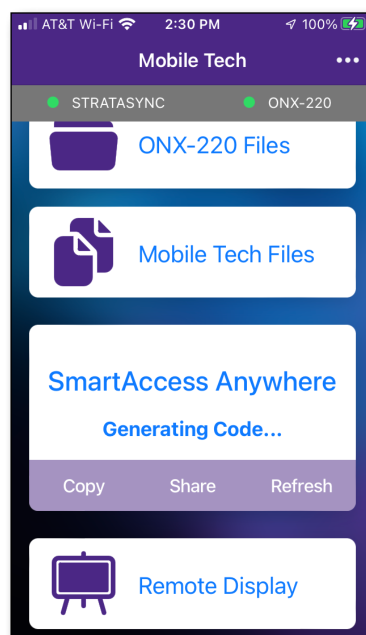
For client downloads and more information, see:

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

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

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

## 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.

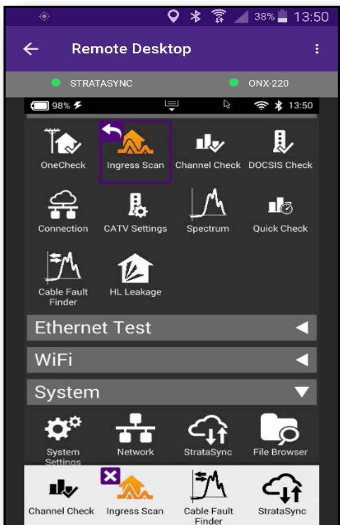
   If you need a new code, select **Refresh**.
4. Share the SAA code with your product or technical specialist to remotely connect to your unit.

# Remote Display

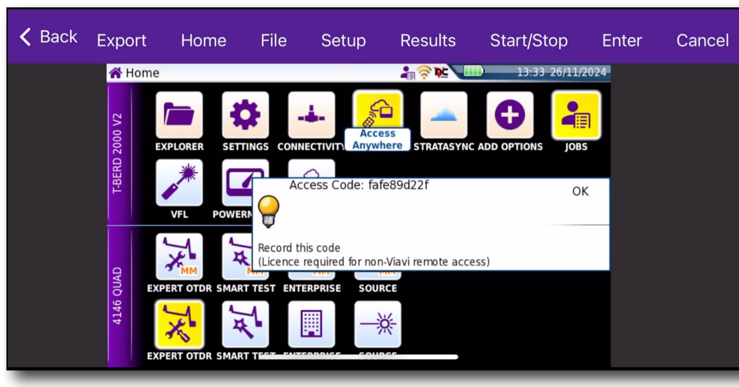
Once your instrument is paired to the Mobile Tech app (and the VIAVI instrument is supported for remote display), you can connect to it remotely to configure and run tests.

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

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




ONX-220, connected remotely

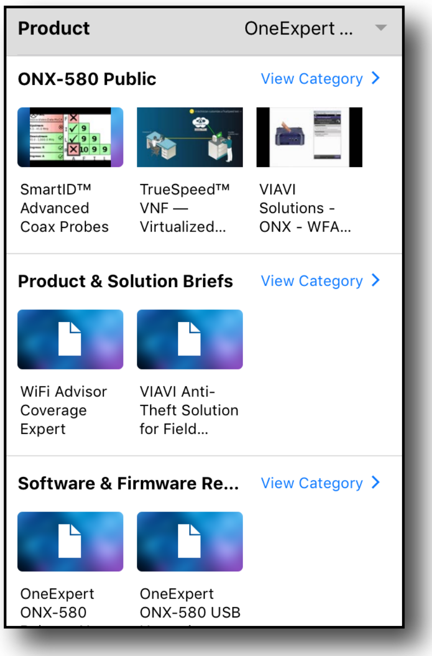



TBERD 2000, connected remotely

> ***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.

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# 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)

Feb 2025

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