



# **StrataSync 11.0**

## **User's Guide**



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## 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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# 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.

For the latest TAC information, visit

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



# Introduction

This chapter provides an overview of the StrataSync System and its key features. Topics discussed in this chapter include the following:

- "About the StrataSync System" on page 14

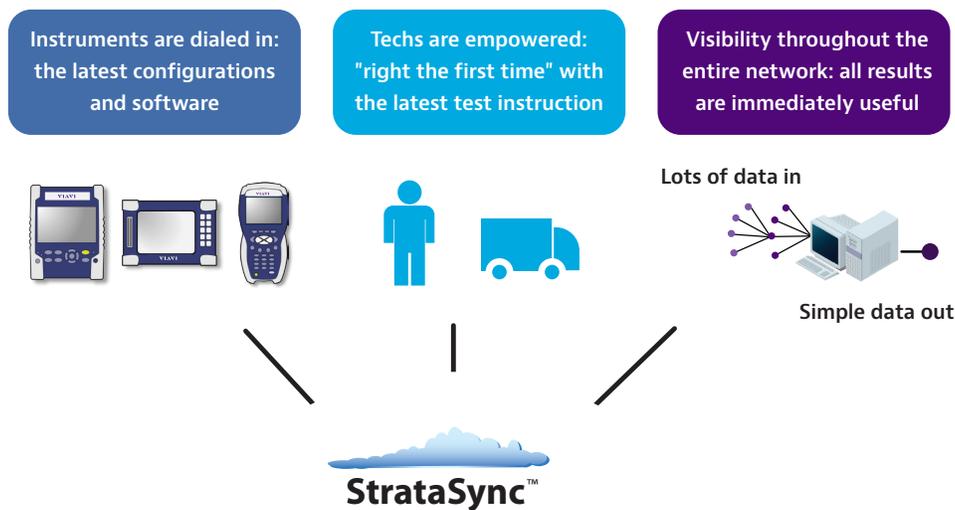
## About the StrataSync System

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

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

### StrataSync offers

- **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/Compliance Reporting** – Automatically track whether assigned jobs are being completed and their pass/fail rate. Results can be viewed per technician, per region, per subcontractor, or however you like.



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

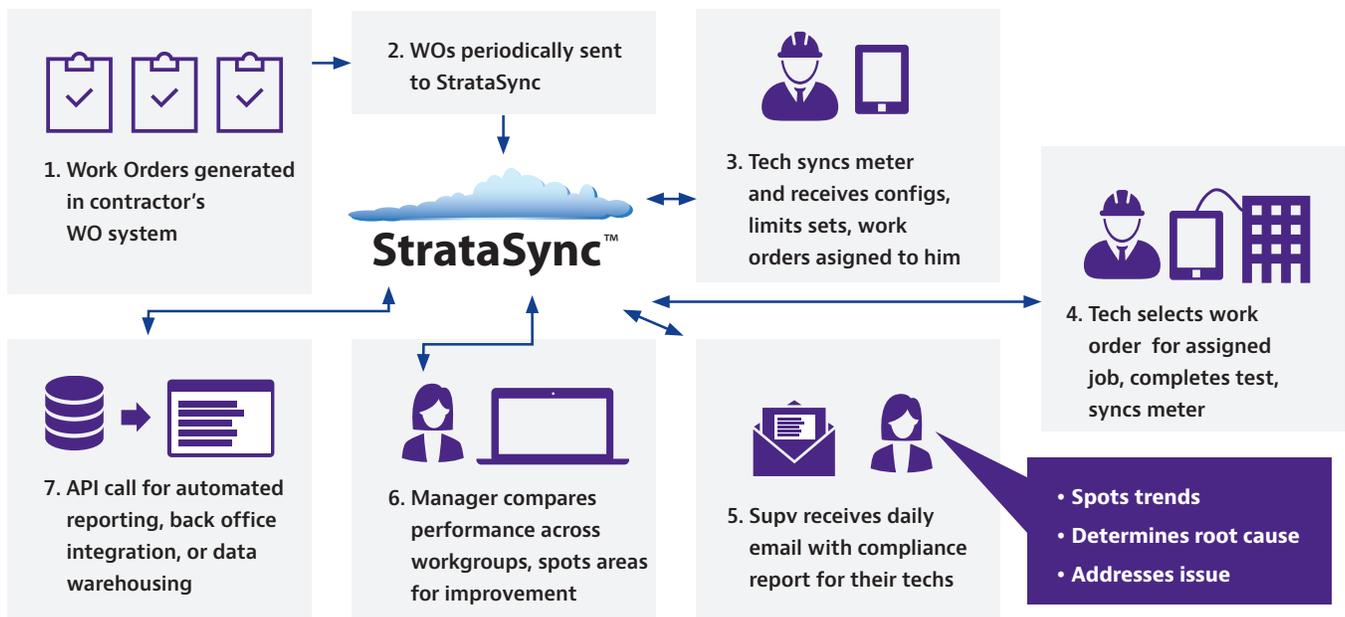
## Asset management

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 An administrator can quickly identify out-of-date and under-utilized test sets and target updates and the reallocation of assets.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

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

## Test data management

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





## Getting Started

This chapter provides steps to get started using StrataSync. Topics discussed include the following:

- "Logging into StrataSync" on page 18
- "Updating Your User Profile" on page 19
- "Setting up StrataSync" on page 20
- "StrataSync Visual Overview" on page 21
- "Connecting to StrataSync from the VIAVI Mobile Tech App" on page 23

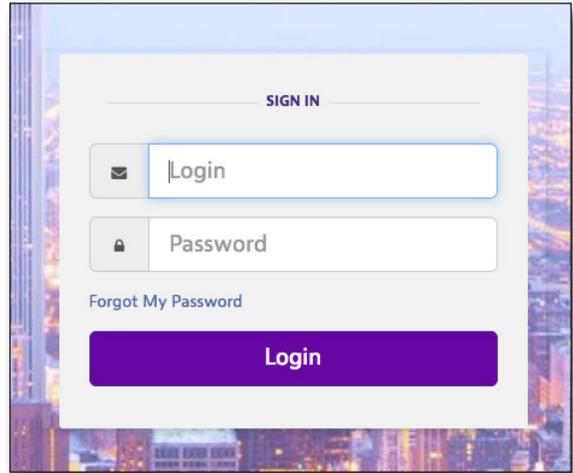
# Logging into StrataSync

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

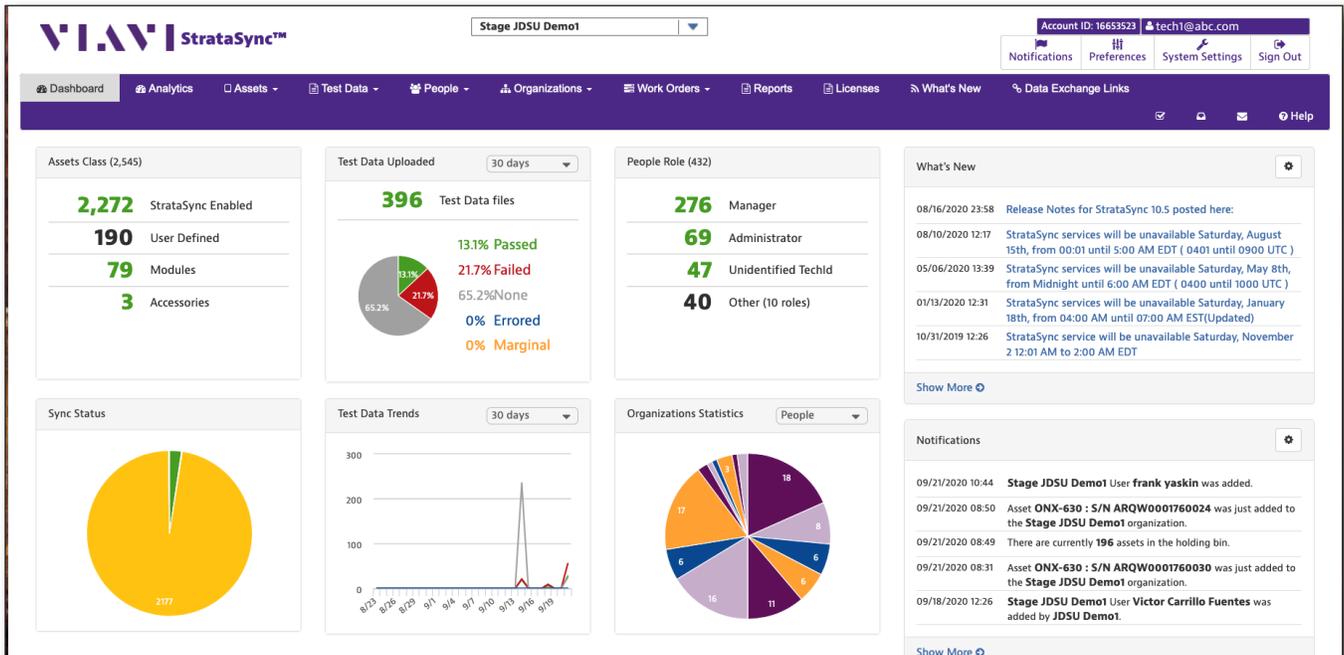
Your StrataSync Administrator may have already created a browser bookmark and user account for you.

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

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



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

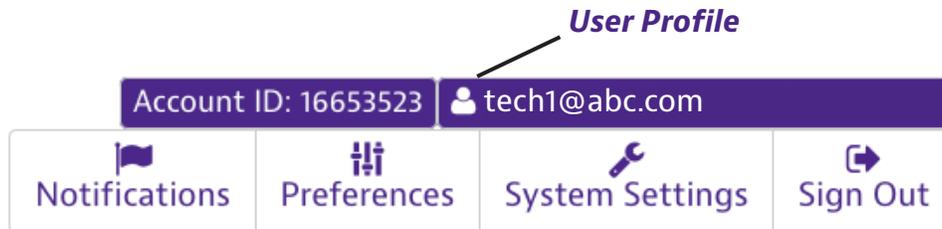


StrataSync Main Dashboard

## Updating Your User Profile

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

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



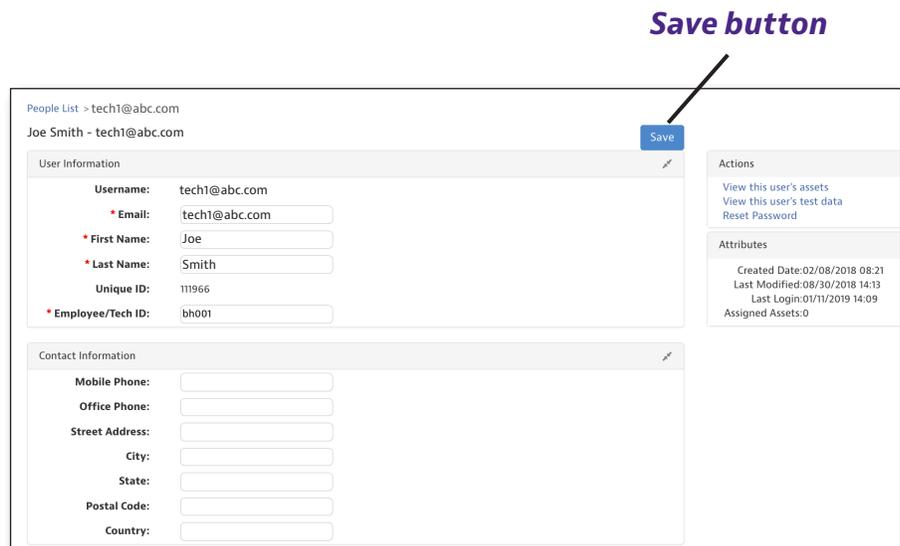
User Profile in the Main toolbar

### User Profile

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

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

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



The image shows a screenshot of the "User Profile" form for "Joe Smith - tech1@abc.com". The form is divided into two main sections: "User Information" and "Contact Information". The "User Information" section includes fields for Username (tech1@abc.com), Email (tech1@abc.com), First Name (Joe), Last Name (Smith), Unique ID (111966), and Employee/Tech ID (bh001). The "Contact Information" section includes fields for Mobile Phone, Office Phone, Street Address, City, State, Postal Code, and Country. On the right side of the form, there is a "Save" button highlighted with a blue box and a line pointing to it from the text "Save button". Below the "Save" button, there are "Actions" (View this user's assets, View this user's test data, Reset Password) and "Attributes" (Created Date: 02/08/2018 08:21, Last Modified: 08/30/2018 14:13, Last Login: 01/11/2019 14:09, Assigned Assets: 0).

## Reset Password

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

## Reset Password

People List > tech1@abc.com  
Joe Smith - tech1@abc.com

User Information

Username: tech1@abc.com

\* Email: tech1@abc.com

\* First Name: Joe

\* Last Name: Smith

Unique ID: 111966

\* Employee/Tech ID: bh001

Contact Information

Mobile Phone:

Office Phone:

Street Address:

City:

State:

Postal Code:

Country:

Actions

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

Attributes

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

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 179](#)

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

**RESET PASSWORD**

Select a method and press next button to proceed

Send password to user directly

Show me password

Done Cancel

**Temporary Password**

Username: abc@jdsu.com

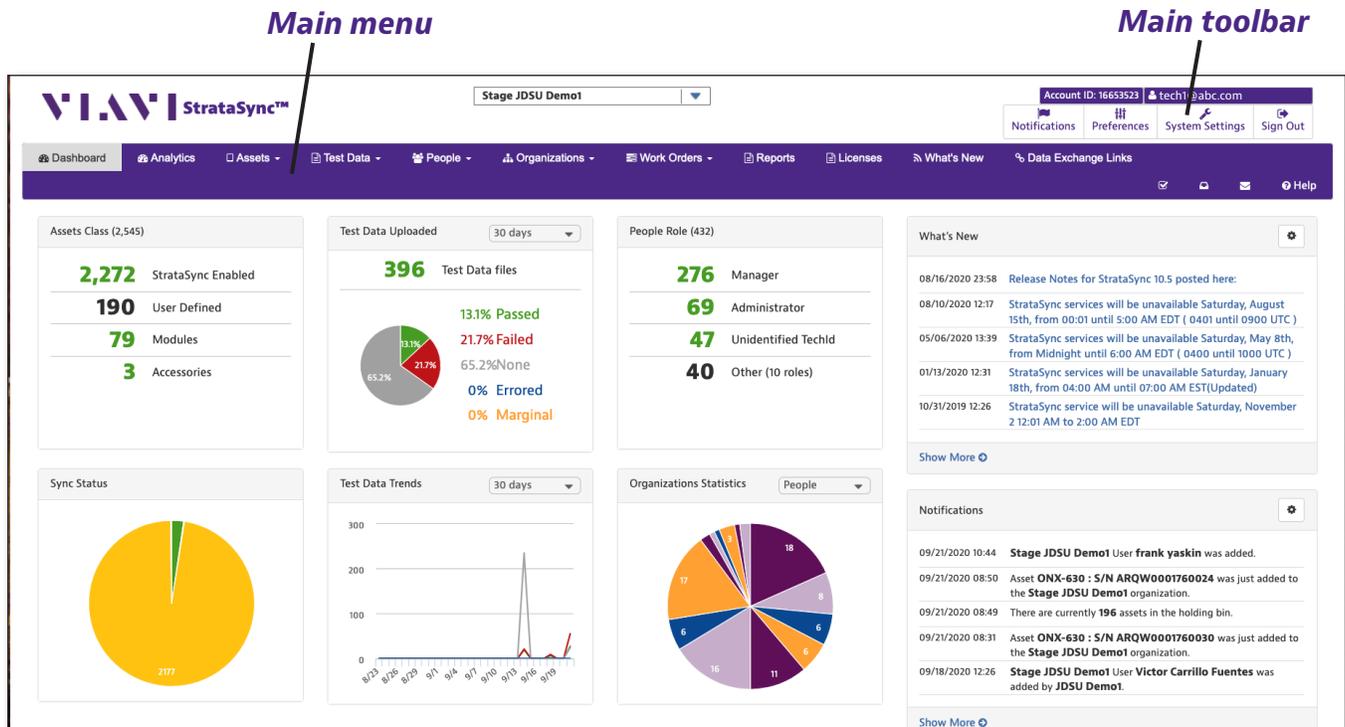
Temporary Password: ^%d#4gM2

Done

## Setting up StrataSync

For more detailed information on configuring and managing the system for administrators, see [Configuration on page 179](#).

# StrataSync Visual Overview



StrataSync Main Dashboard

## Navigation

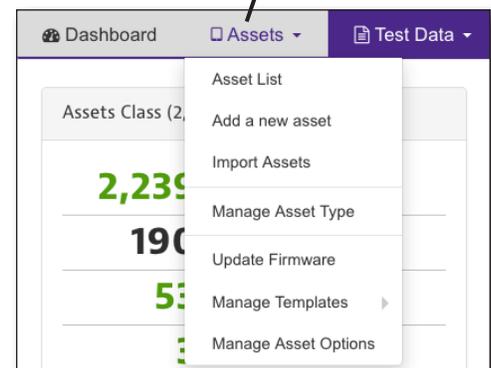
Most of the navigation in the StrataSync System is done through the **Main menu tabs** (purple menu at the top of the screen) and the **Main toolbar** (menu at the top right corner of the screen), as shown above.

## Main Menu

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

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

## Assets tab and dropdown menu



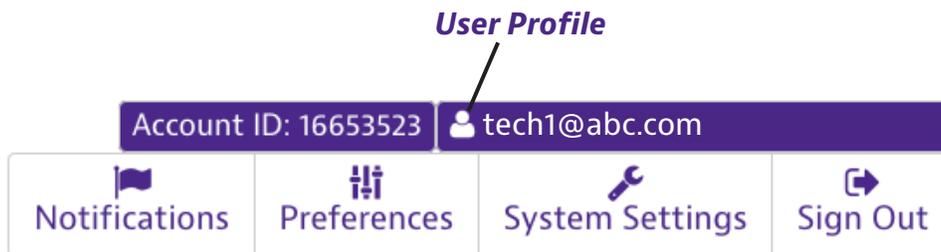


**NOTE:**

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

## Main Toolbar

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



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

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

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

**Preferences**  – Allows you to configure your user preferences, including general appearance, language, security, notifications, measurement units, and dashboard settings. See [Configuration on page 179](#).

**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 179](#).

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

## Connecting to StrataSync from the VIAVI Mobile Tech App

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

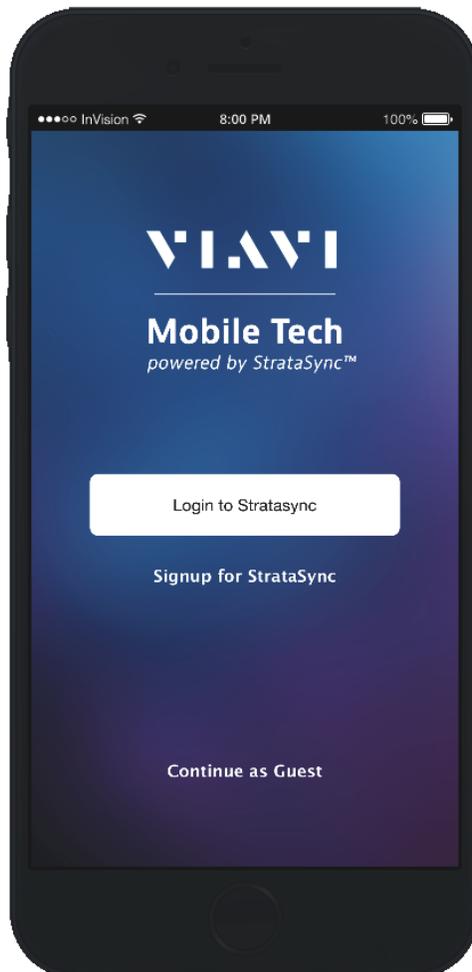
Mobile Tech supports sync and file management between your OneExpert and DSP meters and StrataSync using an iOS or Android mobile device. The application is available on both the App Store and GooglePlay.

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

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



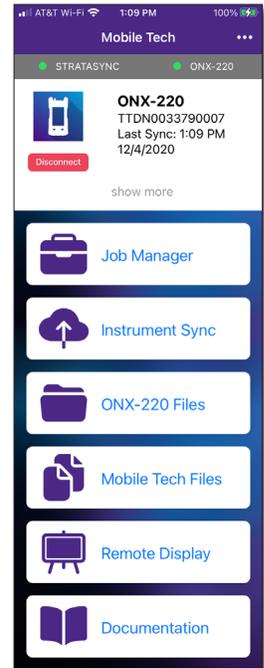
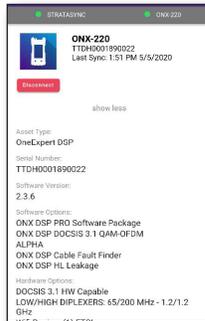
Mobile Tech



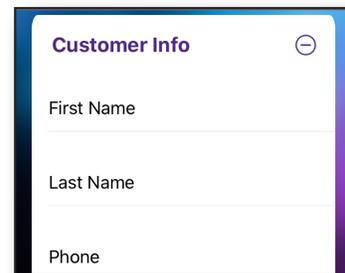
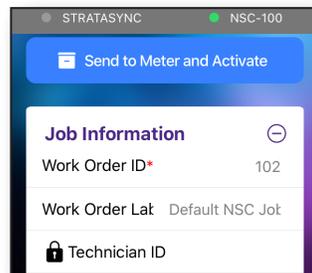
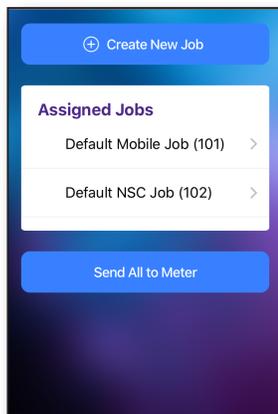
## Mobile Tech Main Menu

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

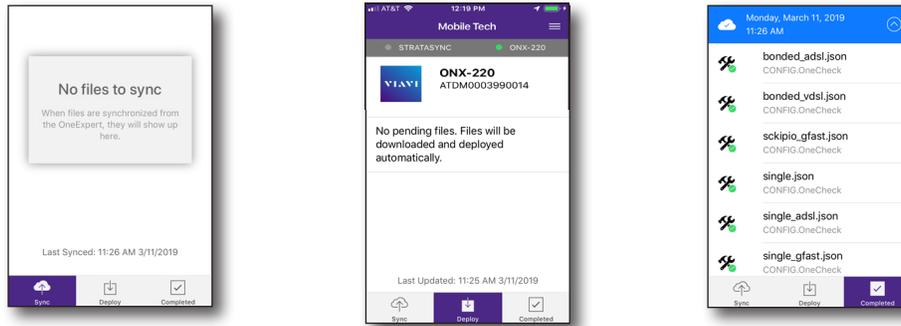
Near the top of the Main menu, you can click **Show more** to see details on your instrument, including all of the installed options.



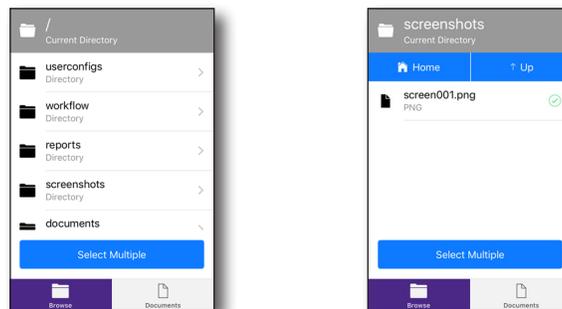
- **Job Manager** – Attach jobs to tests, including customer info and work orders, and track test results



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



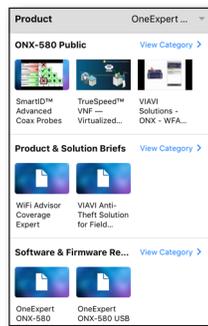
- **File Management** – Manage files on the unit that you can save to your phone or tablet. Use the **Instrument Files** menu to manage files stored on your meter (e.g. ONX-220), use the **Mobile Tech Files** menu to manage those stored on your mobile device.



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



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



# StrataSync Basics

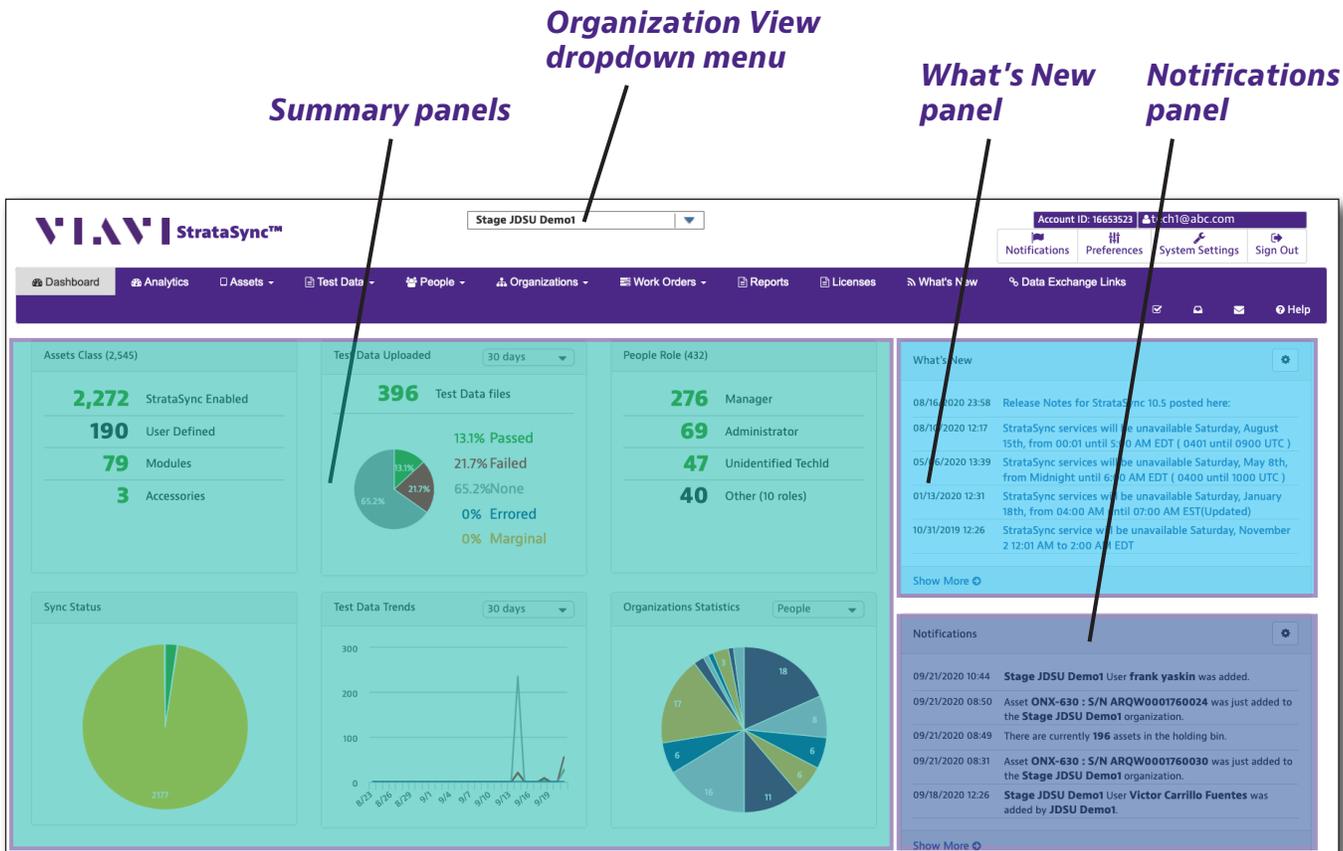
This chapter covers how to use the StrataSync System. Topics discussed include the following:

- "Main Dashboard" on page 28
- "What's New Panel" on page 36
- "Notifications Panel" on page 37
- "Managing Firmware Versions" on page 38
- "Holding Bin" on page 39
- "Scheduling Emails" on page 42
- "Help" on page 45

# 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.**

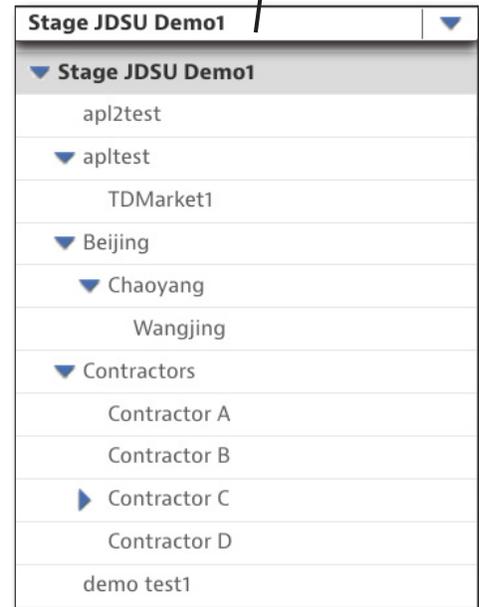
## Changing the Organization View

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*



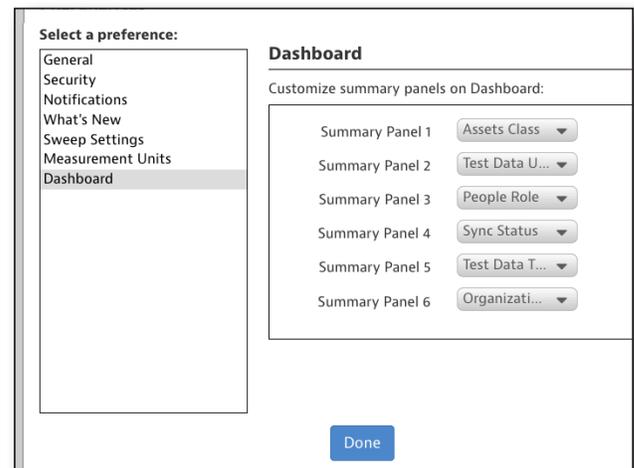
## Customizing Your Summary Panels

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 179](#).



## Assets Class Panel

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

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

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

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

## Assets Status Panel

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

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

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

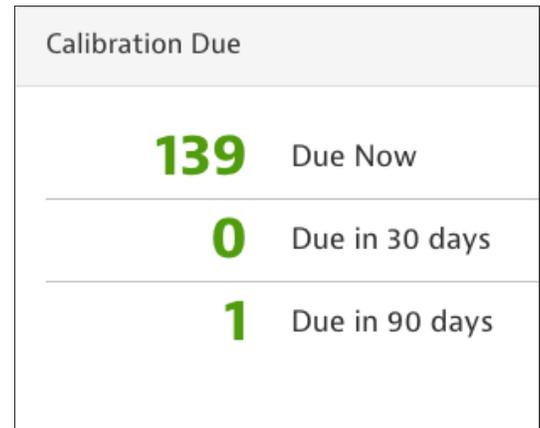
Asset Status	
<b>2290</b>	Active
<b>0</b>	Calibration
<b>1</b>	Repair
<b>0</b>	Loaned
<b>2</b>	Others

## Calibration Due Panel

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

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

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



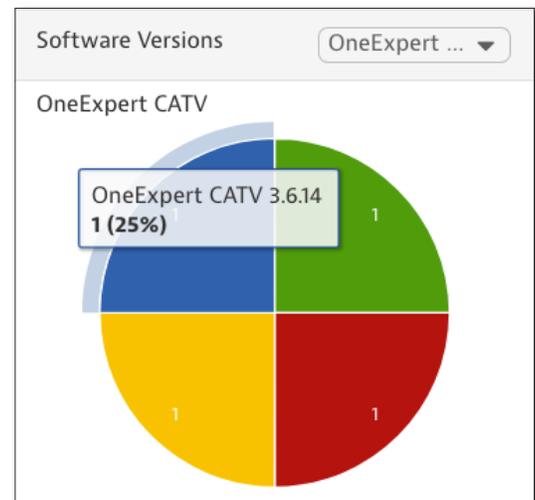
## Software Versions Panel

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

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

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

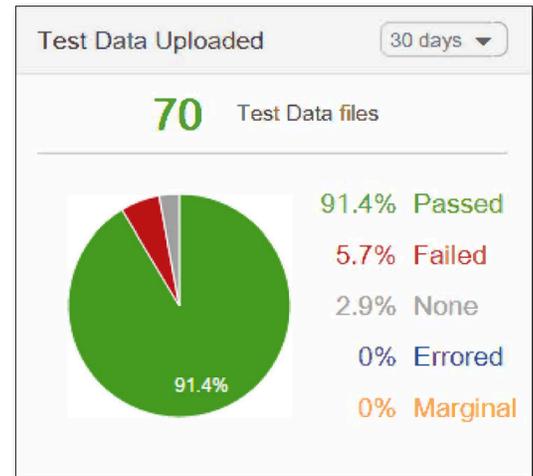
It is updated in real time. Refresh your browser to get the most recent view.



## Test Data Uploaded Panel

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

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



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

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

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



### NOTE:

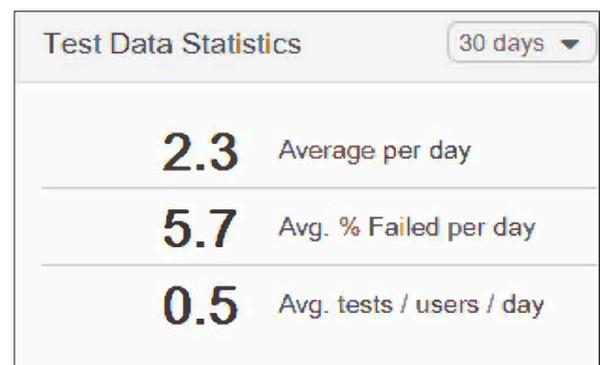
*Times shown in StrataSync correspond to your local time zone, no matter where the device was synced from. Upload times are listed, not when tests were run.*

## Test Statistics Panel

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

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

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



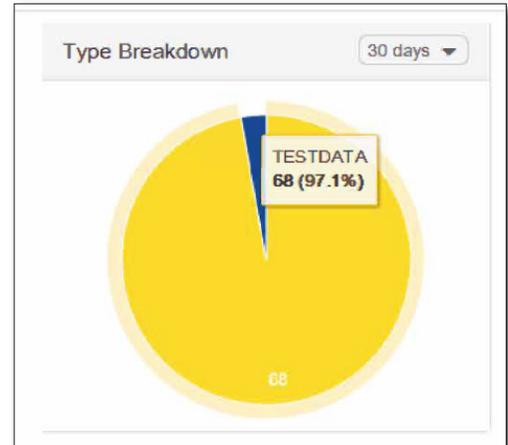
## Test Type Breakdown Panel

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

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

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

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



## People Role Panel

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

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

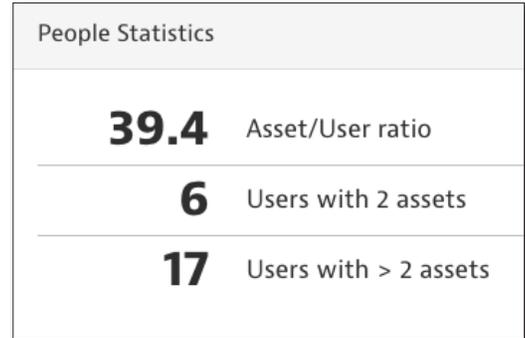
It is updated in real time. Refresh your browser to get the most recent view.

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

## People Statistics Panel

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

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



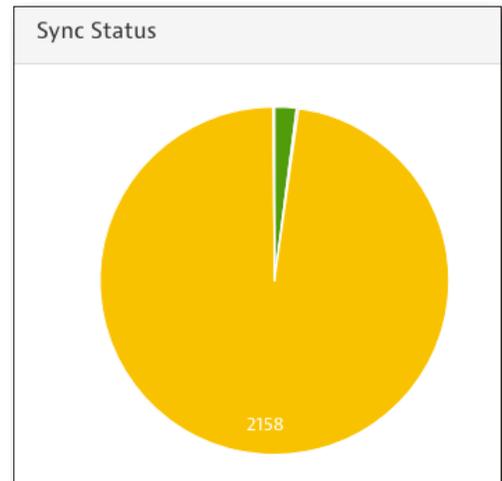
## Sync Status Panel

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

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

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

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

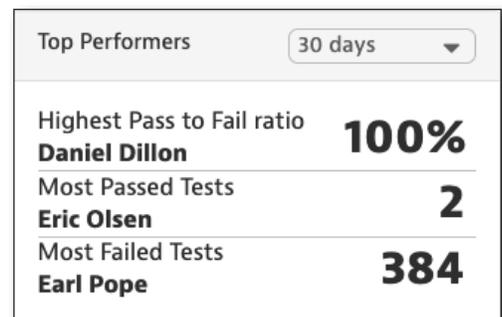


## Top Performers Panel

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

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

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



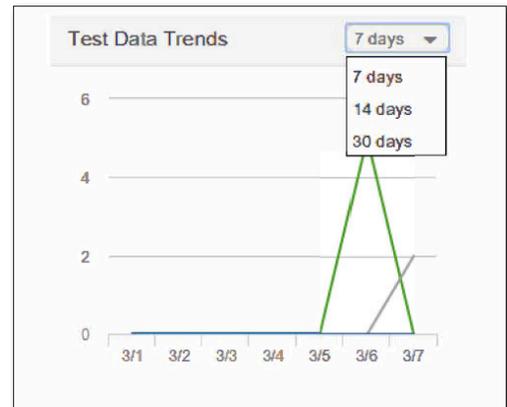
## Test Data Trends Panel

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

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

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

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



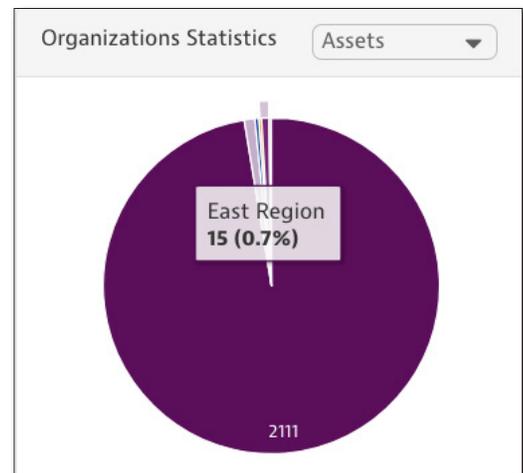
## Organizations Statistics Panel

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

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

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

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



## What's New Panel

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

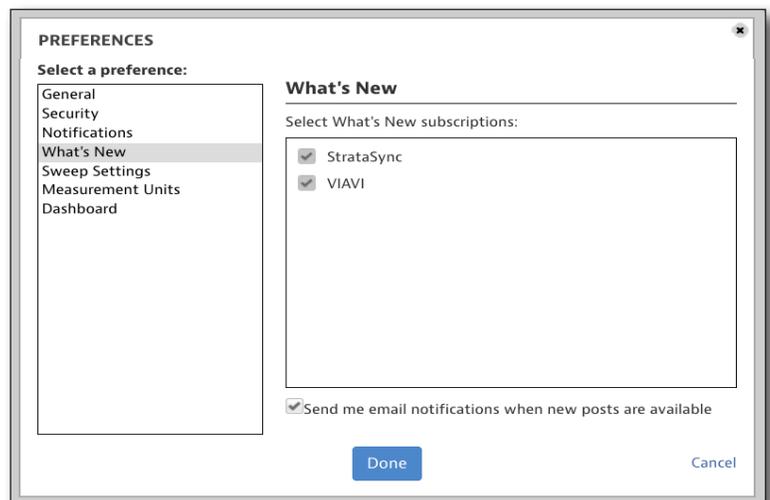
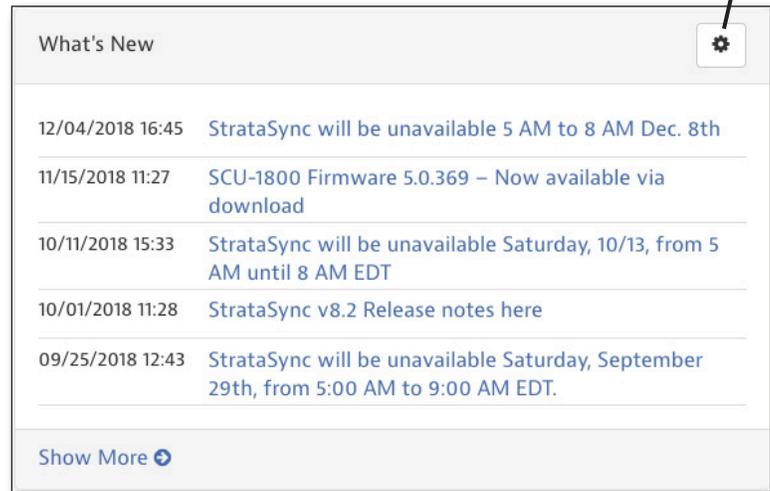
The available types of what's new categories are set up by your StrataSync Administrator.

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

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

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

*Gear button*



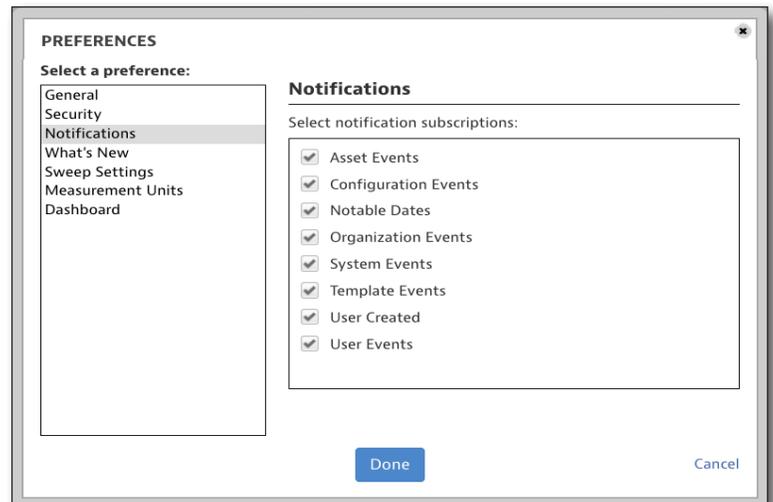
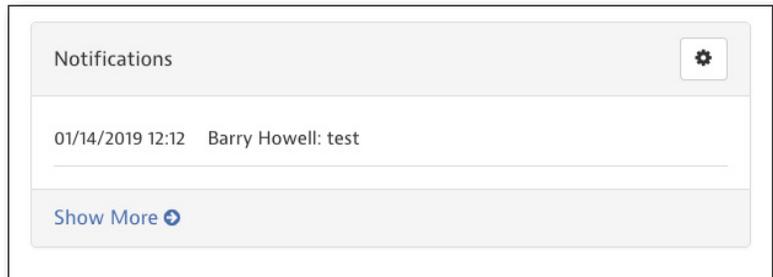
## Notifications Panel

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

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

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

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



## Managing Firmware Versions

If you have been set up to manage firmware versions for your assets, you can manage them right from the Main toolbar.

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.

Select **Manage Firmware Versions**  from the Main toolbar.

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.

See [Configuration on page 179](#).



Manage Firmware Versions ×

Asset Type:

Approval Status	Package Name	Version	Re
To Be Tested ▼	29.1.2018_check overlapping of packa...	29.1.2018_check overlapping of packa...	20
In Test ▼	3.2.244-Demo	3.2.244	20
In Test ▼	3.1.435-Demo	3.1.435	20
Approved ▼	2.9.655-Demo	2.9.655	20
Approved ▼	2.8.246-Demo	2.8.246	20
To Be Tested ▼	3.3.488	3.3.488	20

## 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.

*Holding Bin*



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

**Holding Bin**  
Save view | Save view as... | Customize view | Schedule Email

Add Asset Download Report

Actions For 0 selected record(s) Page 1 of 13

Asset Type	Model	Serial No	Unique ID	Mac Address	Last Sync Date	Tech ID	Tech First Name	Tech Last Name	Tech Organization Name
<input type="checkbox"/>	OneExpert DSL	ONX-580	RRPS0040940021	RRPS1140940021	00:80:16:97:00:86				
<input type="checkbox"/>	OneExpert DSL	ONX-580	ARQA000055001	ARQA110055001	00:07:11:11:7C:84				
<input type="checkbox"/>	HST-3000	HST3000c-ACE2	ARHP5030476545	2BAF400100001	00:80:16:46:99:9C				
<input type="checkbox"/>	HST-3000	HST3000c-ACE1	ARHP5030476545	8961780000001	00:40:4D:13:B4:3C				
<input type="checkbox"/>	HST-3000	HST3000c-ACE2 (128M)	78CD6D000000	78CD6D000000	0E:00:00:EA:18:F0		techimp003		
<input type="checkbox"/>	OneExpert DSL	ONX-580	RRPS0042244365	RRPS0042244365	00:80:16:97:3A:2B	10/27/2016 17:47	hsttest		
<input type="checkbox"/>	DSAM	DSAM-6300	1337000	1337000	00:07:11:09:09:37	01/24/2017 10:45	stevet		
<input type="checkbox"/>	OneExpert DSL	ONX-580	RRPS0040940010	RRPS0040940010	00:80:16:97:00:72	11/03/2017 15:49	3384667		
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker Light	411408	411408					1525542
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	68557	68557					1516220
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	62288	62288					1517531
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	68739	68739					1513403
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	69655	69655					1515788
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	68174	68174					1520880
<input type="checkbox"/>	CLI/Leakage Equip (All)	Trilithic Seeker	69557	69557					1521621

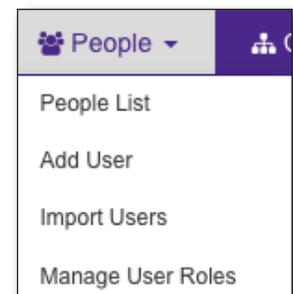
StrataSync Holding Bin in the Assets List

## Moving Assets from the Holding Bin

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

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

We'll discuss how to create a new user more in [People on page 119](#), 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.

**REASSIGN ASSET**

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

**ORGANIZATIONS**

Search for an Organization

Expand All Collapse All

▼ Stage JDSU Demo1

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

**People (323)**

Page 1 of 22

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

Viewing 323 record(s) of 323

Page 1 of 22

Reassign Cancel

*Assign to me*

**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**.



REASSIGN ASSET

1 assets will be assign to Mark User 7871188 in Business Unit, please note filter below is just for view.

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

Viewing 1 record(s) | Page 1 of 1

Back Confirm Cancel

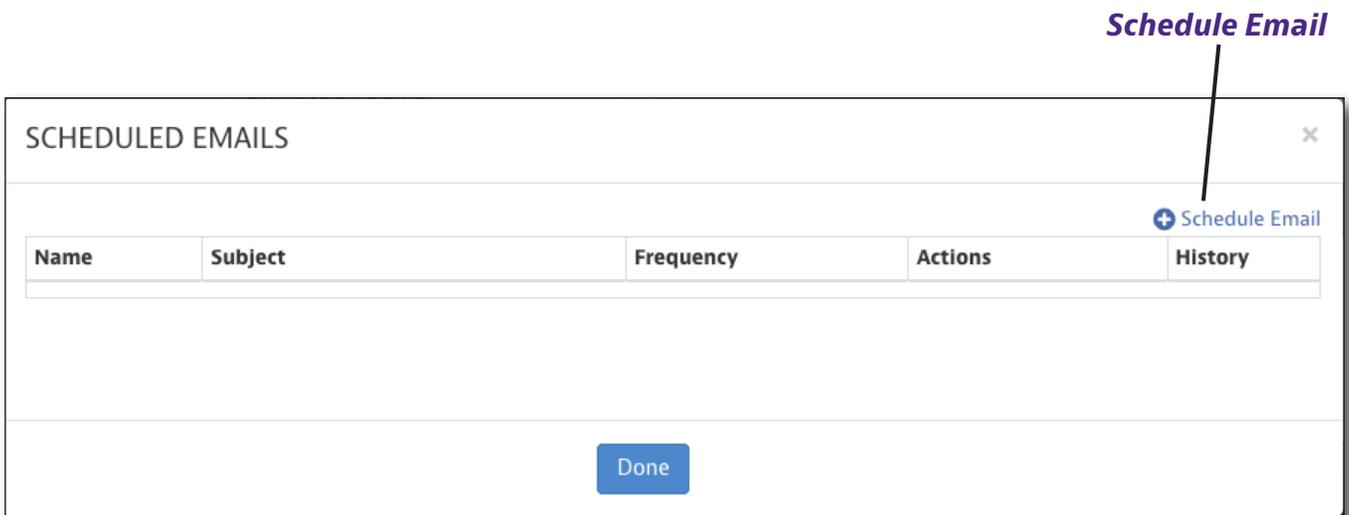
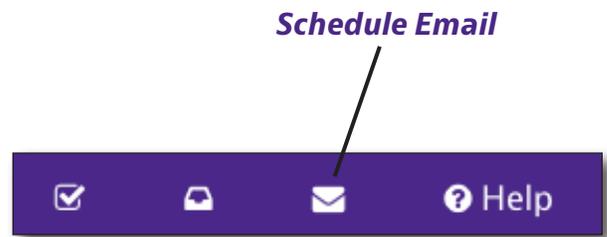
## Scheduling Emails

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

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

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

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



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

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

VIEWS-Select views to add to the Email

View Type

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

« 1 2 3 4 »

**Next** Cancel

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

SCHEDULE EMAIL

\* **Name:**

\* **Recipients:**

\* **Subject:**

\* **Email Frequency:**

\* **Start Date:**

Starts at 6:00am EST

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

« 1 »

**Back** **Save** Cancel

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

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

**Frequency** [Close]

\* **Repeats:** Daily

\* **Repeat every:** 1 @ Days

\* **Starts on:** [Empty field]

\* **Ends:**  Never  
 After [Empty field] occurrences  
 On [Empty field]

**Summary:** Daily

[Done] [Cancel]

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

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

**SCHEDULE EMAIL** [Close]

\* **Name:** Brian's Org View

\* **Recipients:** tech1@abc.com

\* **Subject:** StrataSync View - Brian's Org View

\* **Email Frequency:** Daily

\* **Start Date:** 01/18/2019  
Starts at 6:00am EST

View Name	View Type	Actions
Brian's Org View	ASSET_LIST	Delete

« 1 »

[Back] [Save] [Cancel]

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

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

SCHEDULED EMAILS <span style="float: right;">×</span>				
Name	Subject	Frequency	Actions	History
Brian's Org View	StrataSync View - Brian's Org View - ASSET_LIST	Daily	<a href="#">Edit</a> <a href="#">Delete</a>	<a href="#">History</a>

[+ Schedule Email](#)

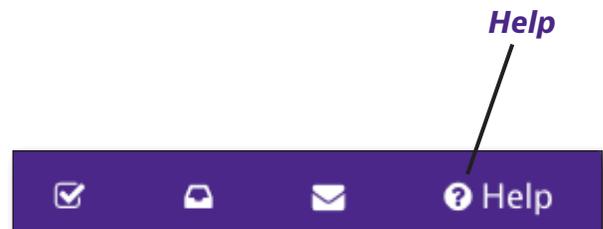
« 1 »

[Done](#)

## Help

The Help feature allows you to download a PDF of the *StrataSync User's Guide* for easy reference.

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





# Analytics

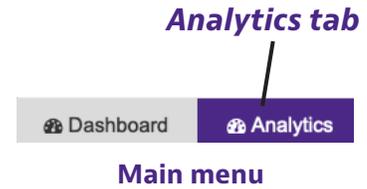
This chapter covers how to use the Analytics features of StrataSync. Topics discussed include the following:

- "Analytics" on page 48
- "Searching" on page 50
- "Views" on page 51
- "CSV Export" on page 52
- "Saving Dashboards" on page 53

# Analytics

The **Analytics** tab includes optional **Fiber and 5G Dashboard** information for instruments in the field if configured for your StrataSync account.

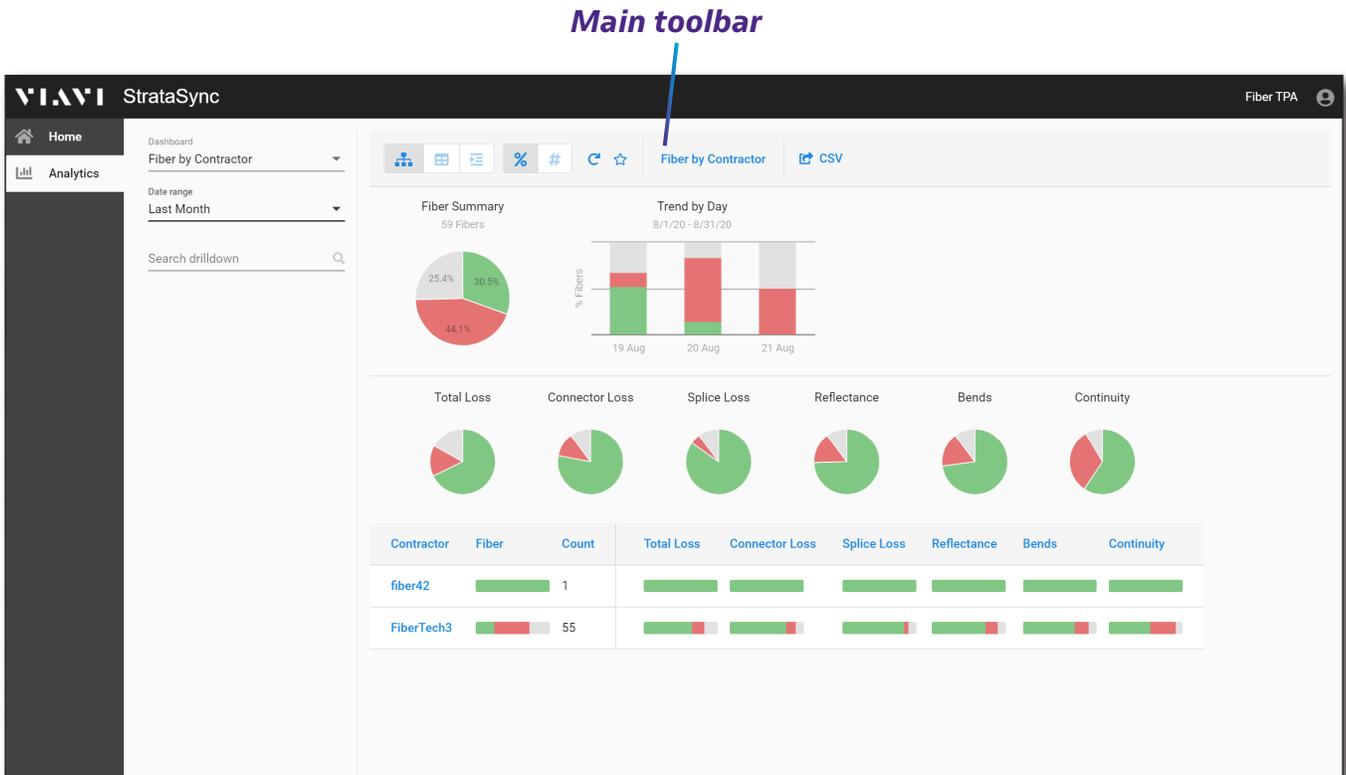
Click the **Analytics** tab in the Main menu to bring up the Analytics Dashboard, then use the filter panel on the left to choose the desired dashboard.



## Fiber Dashboard

By default, it 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.

## 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.

The screenshot shows the StrataSync interface for a 5G Closeout Test. The dashboard includes a sidebar with navigation options (Home, Analytics) and a main table of test results. The table columns are Site, Band, Sector, Cable, Termination, Type, Test Time, Trace Min, Trace Max, and DTF Length(m). The data is filtered by 'Last Month'.

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

### 5G Dashboard

#### NOTE:



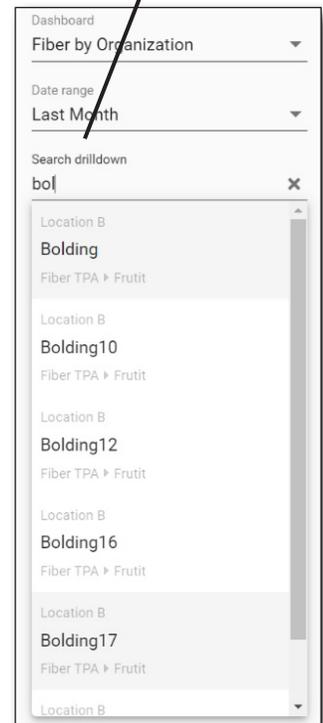
**The tabs in the Main menu are dependent on the options available for your StrataSync account. See your VIAMI sales representative for more information.**

## Searching

You can search by typing into the **Search drilldown** in the panel on the left. 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



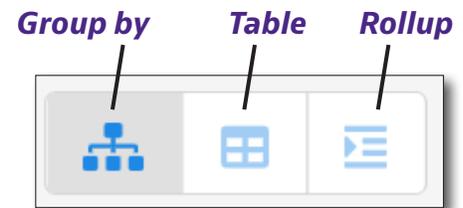
## Views

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:

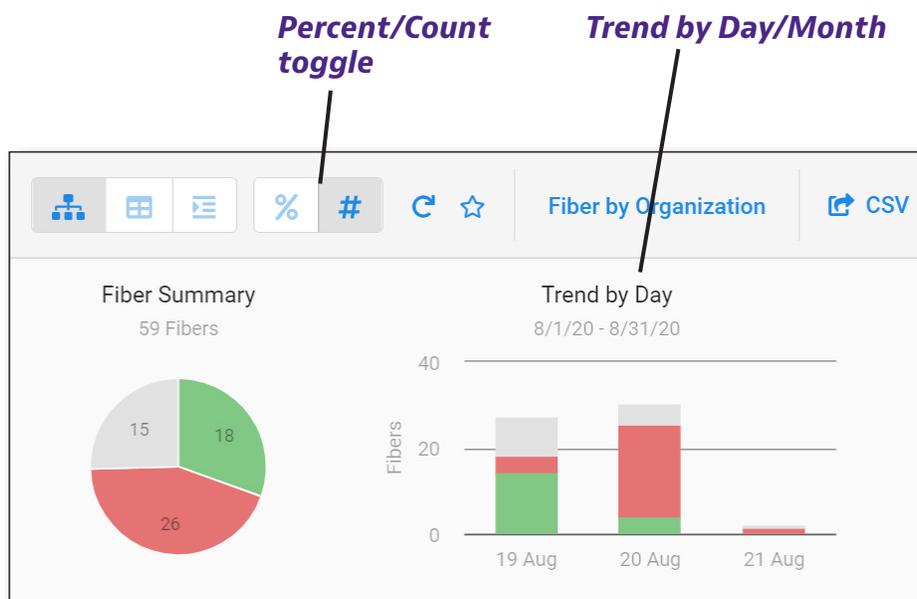
- **Group by** – Top-level aggregation object (e.g. organization)
- **Table** – Commonly aggregated object (e.g. 'Fiber' or 'Site')
- **Rollup** – Tabular drilldown view



### 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.

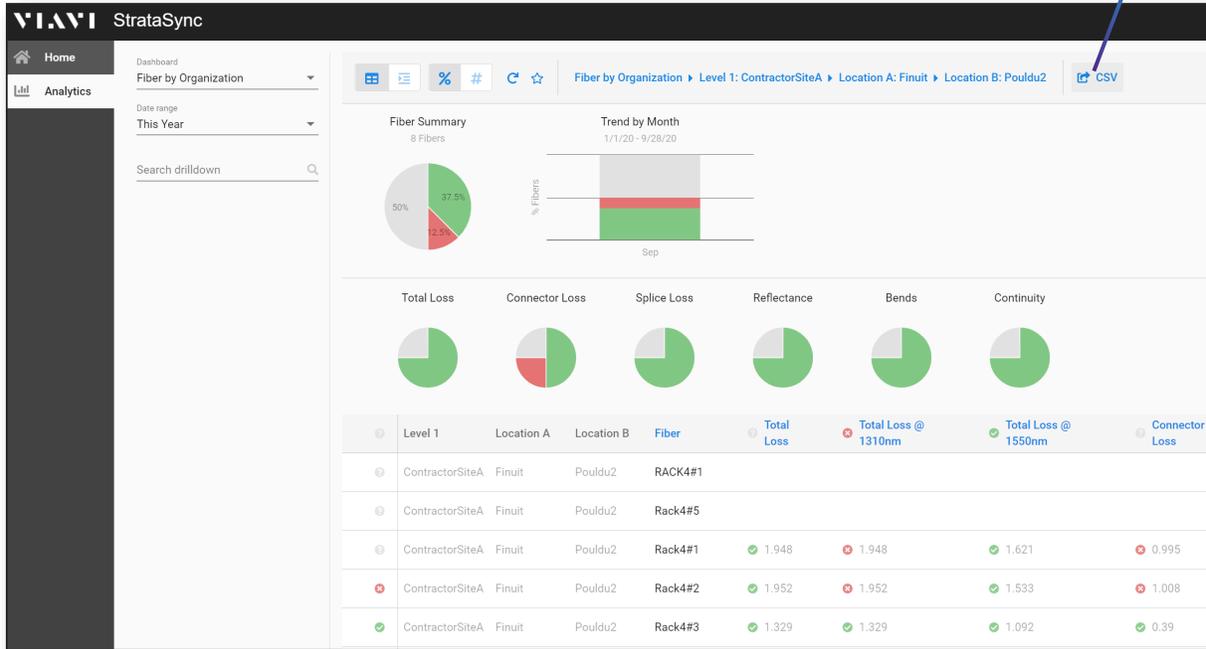


# CSV Export

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

Select **CSV export** on the far right of the Main toolbar to save to your desktop.

**CSV export**



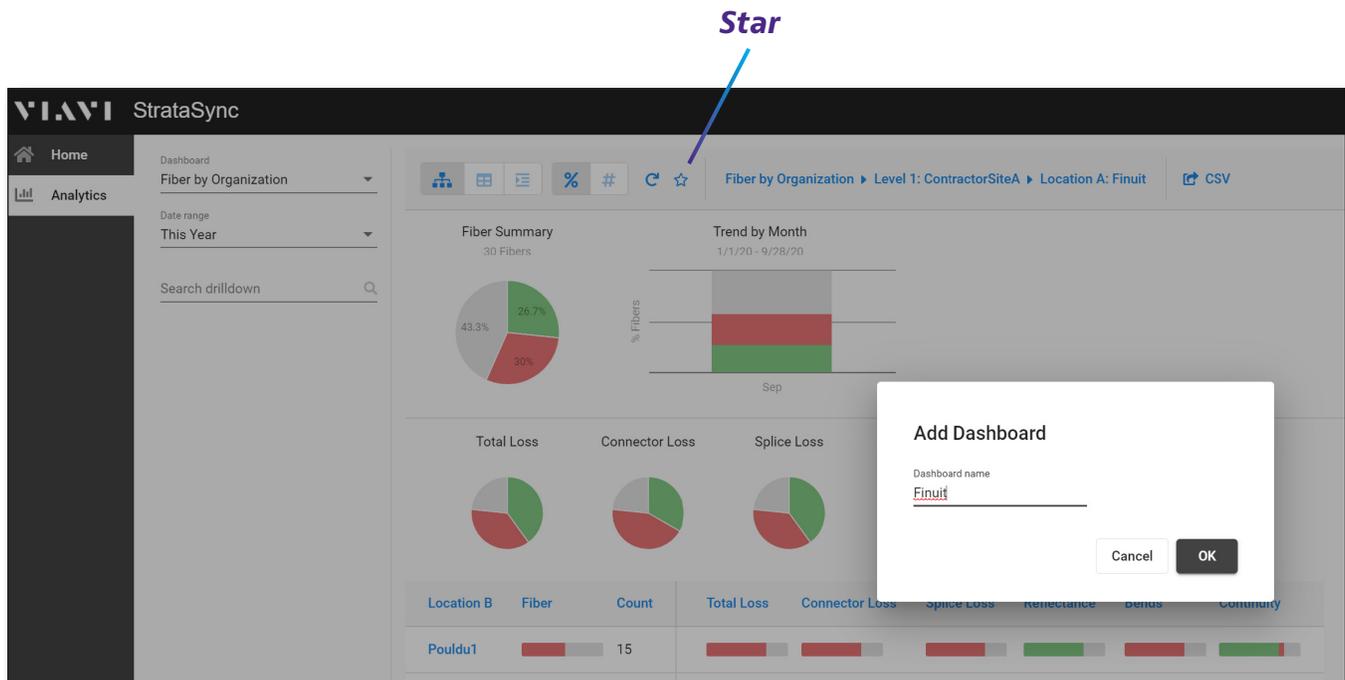
Level 1	Location A	Location B	Fiber	Total Loss	Connector Loss	Splice Loss	Reflectance	Bends	Continuity	Start Time	End Time		
ContractorSiteA	Finuit	Pouldu2	RACK4#1						pass	2020-09-11	2020-09-10T11:45:00.000Z		
ContractorSiteA	Finuit	Pouldu2	Rack4#5						pass	2020-09-11	2020-09-10T11:45:17.000Z		
ContractorSiteA	Finuit	Pouldu2	Rack4#1	1.948	pass	1.948	fail	1.621	pass	0.995	fail	2020-09-11	2020-09-10T11:45:29.000Z
ContractorSiteA	Finuit	Pouldu2	Rack4#2	1.952	pass	1.952	fail	1.533	pass	1.008	fail	2020-09-11	2020-09-10T11:46:02.000Z
ContractorSiteA	Finuit	Pouldu2	Rack4#3	1.329	pass	1.329	pass	1.092	pass	0.39	pass	2020-09-11	2020-09-10T11:48:46.000Z
ContractorSiteA	Finuit	Pouldu2	Rack4#4	1.324	pass	1.324	pass	1.101	pass	0.388	pass	2020-09-11	2020-09-10T11:50:59.000Z
ContractorSiteA	Finuit	Pouldu2	Rack4#5	1.333	pass	1.333	pass	1.089	pass	0.385	pass	2020-09-11	2020-09-10T11:51:30.000Z
ContractorSiteA	Finuit	Pouldu2	Rack4#6	1.335	pass	1.335	pass	1.092	pass	0.388	pass	2020-09-11	2020-09-10T11:52:02.000Z

**CSV file detail**

## Saving Dashboards

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

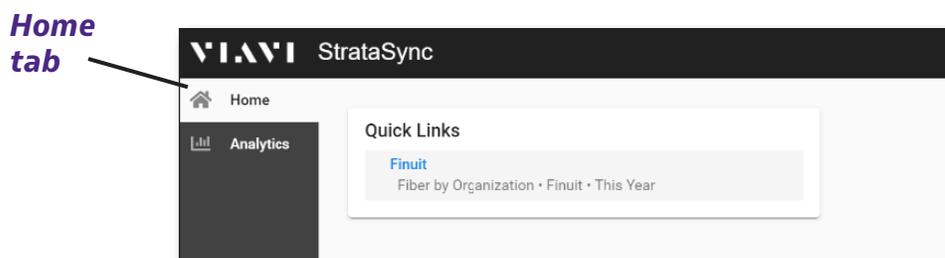
Select the **Star** in the Main toolbar. A pop-up comes up so you can name the dashboard, then select **OK**.



## Viewing Dashboards

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

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



### Quick Links Dashboards



# Assets

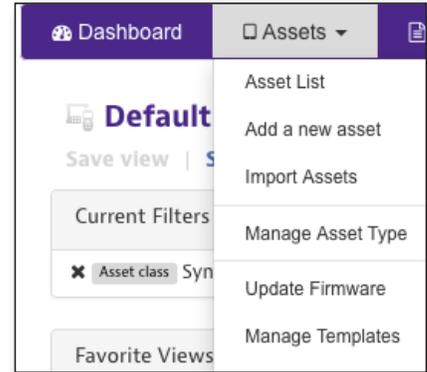
This chapter covers how to use the Asset Management features of StrataSync. Topics discussed include the following:

- "Assets" on page 56
- "Searching and Sorting" on page 57
- "Views" on page 60
- "Asset List" on page 63
- "Adding New Assets" on page 79
- "Importing Assets" on page 80
- "Managing Asset Types" on page 81
- "Updating Firmware" on page 85
- "Managing Configuration Templates" on page 89
- "Managing Asset Options" on page 98
- "Managing Asset Groups" on page 104

# Assets

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

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



Assets dropdown menu

Assets tab

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

Asset List selected from the Assets tab

## Searching and Sorting

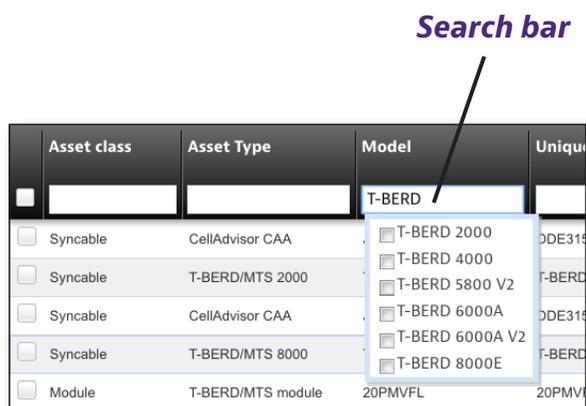
From the Assets List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

### Searching

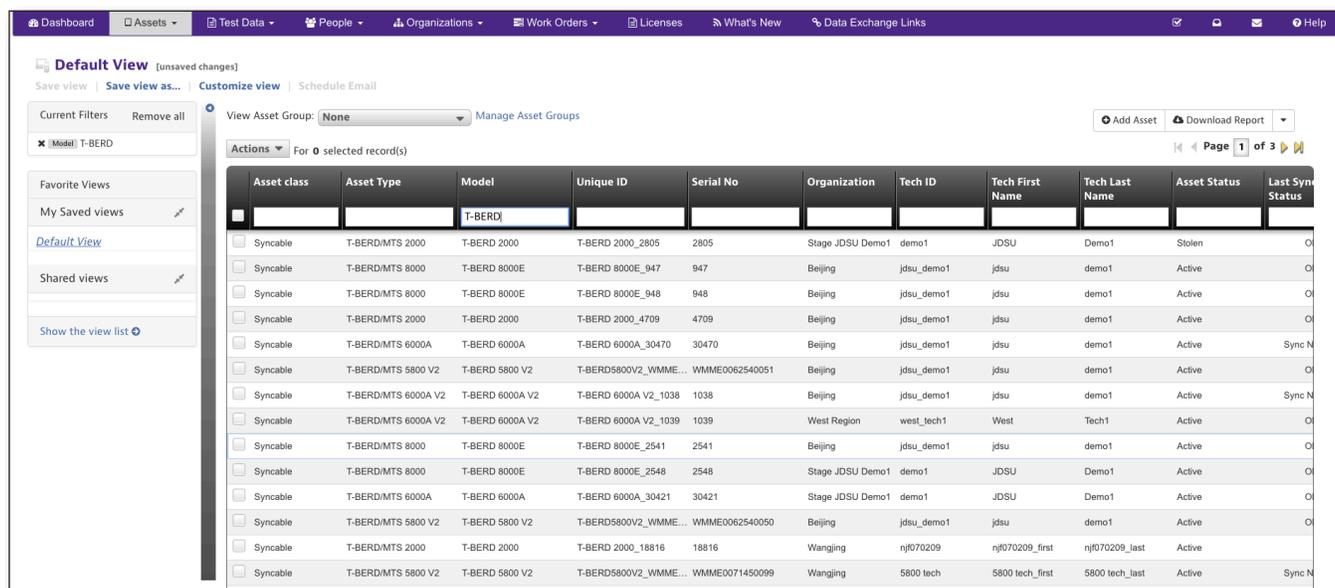
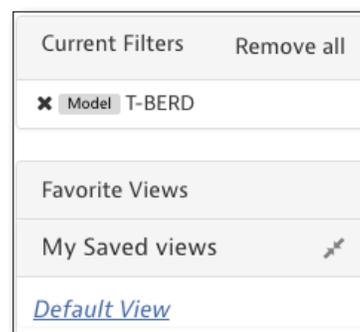
You can search by typing into the search bar under a column header. The list updates with the results.

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

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



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

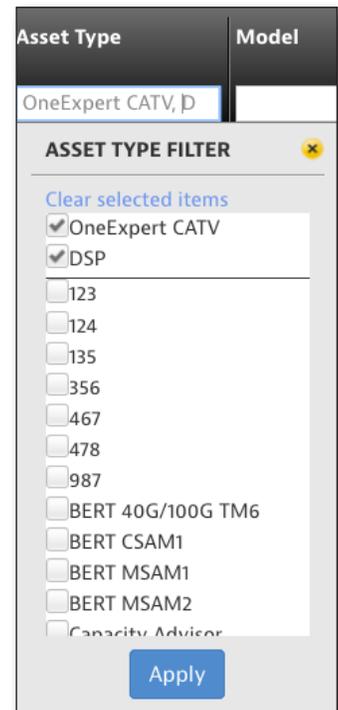


Scroll to the right to reveal more detail, including Software Options and Test Data.

## 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:

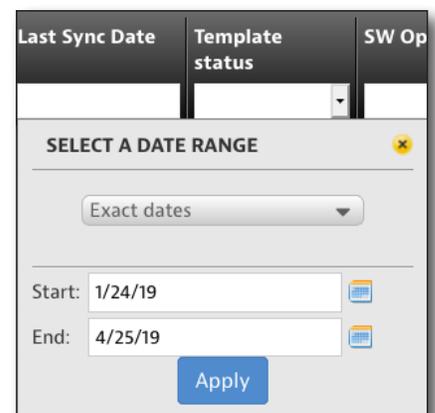
**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

## 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 61](#).**

## Sorting

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

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

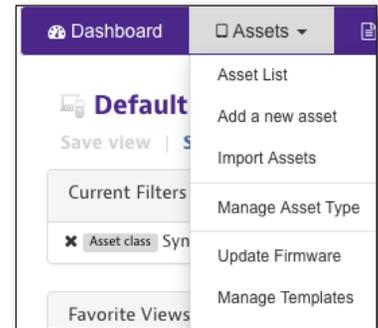


# Views

## Customizing Views

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

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

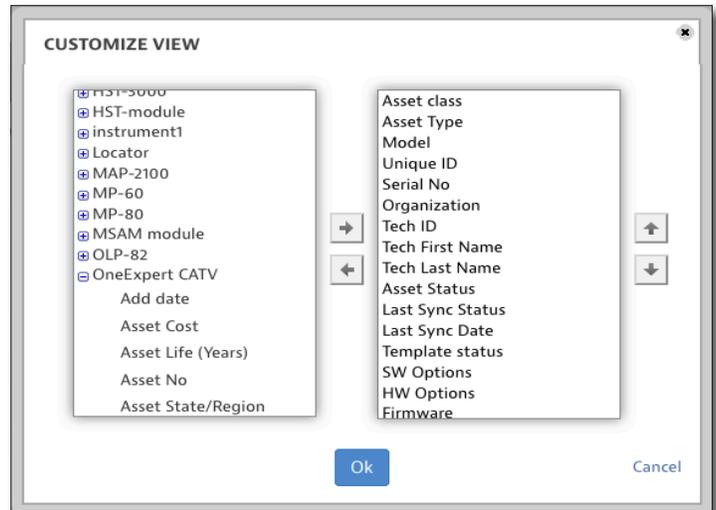


**Save View As**      **Customize View**

Asset class	Asset Type	Model	Unique ID	Serial No	Organization	Tech ID	Tech First Name	Tech Last Name	Asset Status	Last Sync Status	Last Sync Date
Syncable	CellAdvisor CAA	JD724C	DDE31588	DDE31588	Stage JDSU Demo1	kk	KK_first	KK_last	Active	OK	03/09/2015 09
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_2805	2805	Stage JDSU Demo1	demo1	JDSU	Demo1	Stolen	OK	04/07/2015 13
Syncable	CellAdvisor CAA	JD724C	DDE31587	DDE31587	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	OK	05/11/2016 05
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_947	947	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	T-BERD/MTS 8000	T-BERD 8000E	T-BERD 8000E_948	948	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	T-BERD/MTS 6000A	MTS 6000A	MTS 6000A_31028	31028	Beijing	jdsu_demo1	jdsu	demo1	Active	Sync Needed	08/03/2016 15
Syncable	DSAM	DSAM-6300	3021451	3021451	East Region	1890	jon	doe	Active	Sync Needed	10/21/2013 16
Syncable	T-BERD/MTS 2000	T-BERD 2000	T-BERD 2000_4709	4709	Beijing	jdsu_demo1	jdsu	demo1	Active	OK	10/11/2018 14
Syncable	DSAM	DSAM-6300	1101215	1101215	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	10/24/2013 12
Syncable	DSAM	DSAM 1234	AT-1383124816903	AT-1383124816903	Stage JDSU Demo1				Active	Sync Needed	
Syncable	DSAM	DSAM-6000	0020451	0020451	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	11/11/2013 10
Syncable	DSAM	DSAM-6300	0192099	0192099	Stage JDSU Demo1	fro47837	Yvan	Frosio	Active	Sync Needed	11/08/2013 07
Syncable	DSAM	DSAM-6000	0176202	0176202	Stage JDSU Demo1	demo1	JDSU	Demo1	Active	Sync Needed	11/12/2013 08
Syncable	T-BERD/MTS 6000A	MTS 6000A	MTS 6000A_00002	00002	Stage JDSU Demo1	t6d1	t6d1_first	t6d1_last	Active	Sync Needed	12/10/2013 15
Syncable	SmartClass TPS	SCTPS-AB-CU	000000654321	000000654321	West Region	4580409	4580409_first	4580409_last	Active	OK	02/05/2014 04

Assets List Default View

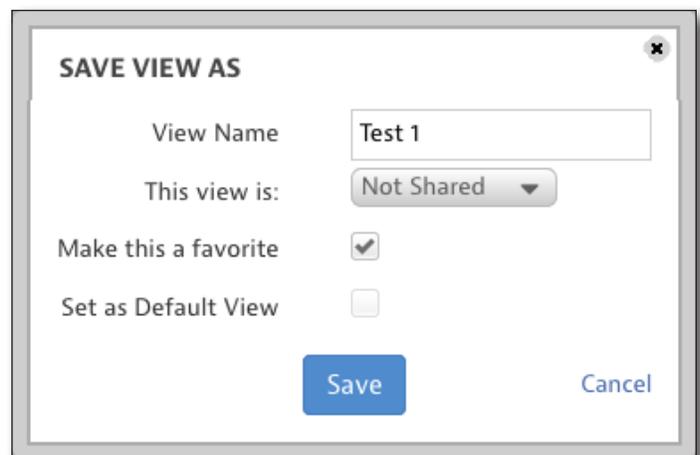
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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



## Saving Views

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

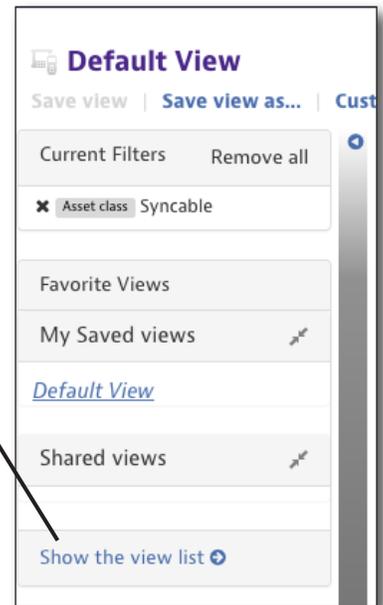
The new view is listed under the Favorite Views section on the left.



## Sharing and Editing Views

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

*Show the view list*



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

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

[Done](#)

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

# Asset List

## Editing Asset Details

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

The screenshot displays the StrataSync interface for editing an asset. The top navigation bar includes links for Dashboard, Assets, Test Data, People, Organizations, Work Orders, Licenses, What's New, and Data Exchange Links. The main content area is titled 'Asset List > Asset Khanh10004' and shows the asset 'ONX-620: S/N Khanh10004' with a 'Save' button. The 'Status' section includes fields for Asset Status (Active), Firmware (Update Firmware), Enforced Firmware, HW Version, Add date (08/01/2018), ID (133692), Calibration Date, Last Sync Date, and Last Sync Status (Sync Needed). The 'Device details' section includes Asset Type (OneExpert CATV), Model (ONX-620), Manufacturer, Description, Catalog Number, Unique ID (Khanh10004), and Serial No (Khanh10004). The right-hand sidebar contains sections for Actions (View Mainframe History, View Configuration), Most Recent Test Data (View all tests of this device), Sync History (a list of sync events with timestamps and descriptions), and Documentation (View more documents).



### NOTE:

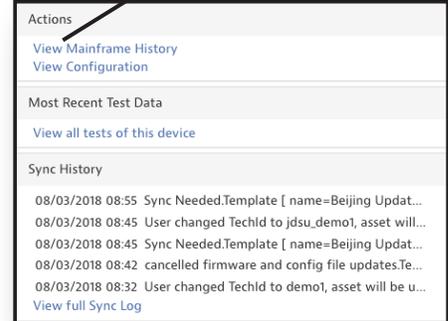
**You don't have to manually add syncable assets. Just sync them to automatically add them and all details to your Asset List.**

### View Mainframe History

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

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

### View Mainframe History



MAINFRAME MODULE HISTORY - T-BERD 8000E - S/N 947

Page 1 of 1

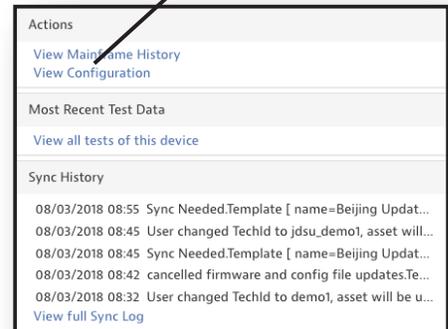
Timestamp	Action	Parent ID	ID	Module Description
10/18/2013 10:59	attached	T-BERD 8000E_947	E80EBTPCK_812	

### View Configuration

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

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

### View Configuration



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

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

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

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

Configuration Sections

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

Current Template: ---

Configuration Artifacts

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

Channel Plan Global Archive

Actions

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



**NOTE:**

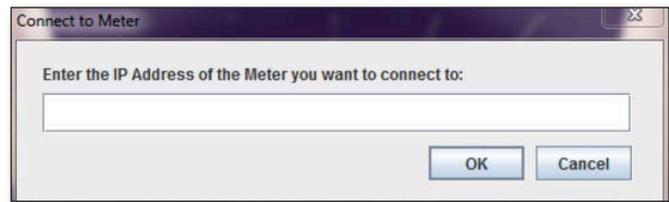
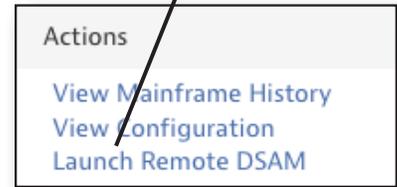
***For Edit, Rename, and Delete, changes will be applied to the instrument on the next sync. This also removes this instrument from its template.***

### Launch Remote DSAM (DSAM instruments only)

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

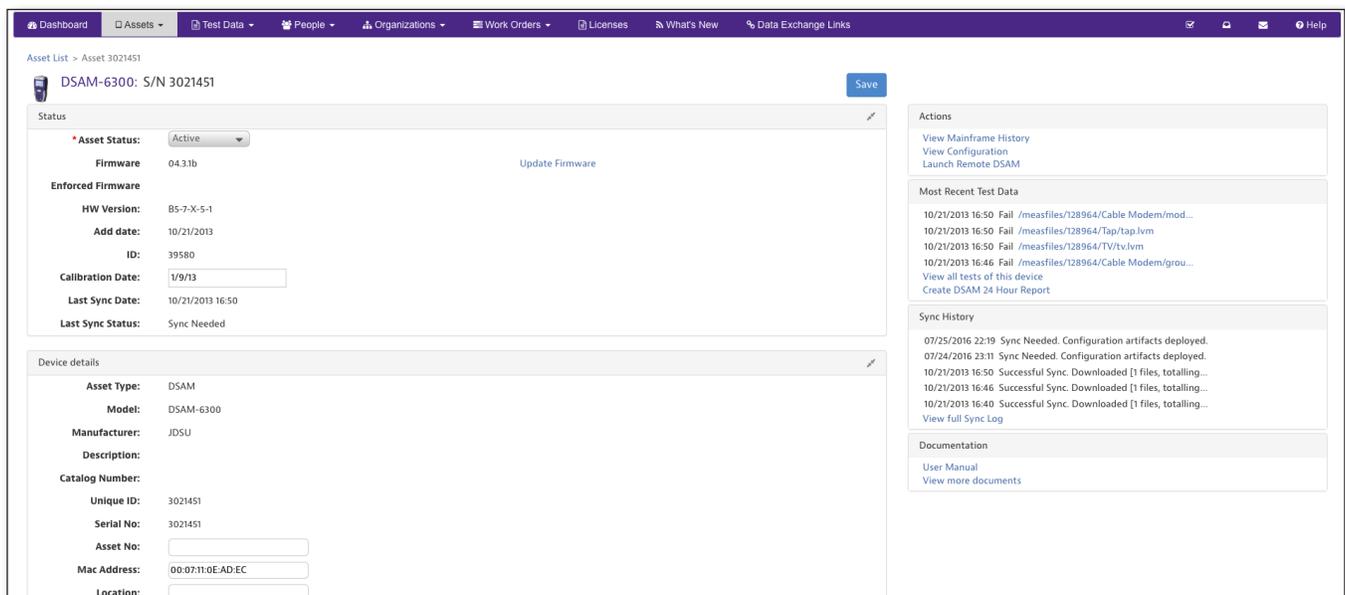
1. On the right side under the Actions panel, select **Launch Remote DSAM**.
2. Follow the instructions to launch Java, if prompted.
3. Once completed, a DSAM picture is displayed. Select Connection > Connect to Meter from the top menu.
4. Enter the DSAM IP address and click **OK**.

**Launch Remote DSAM**



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

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

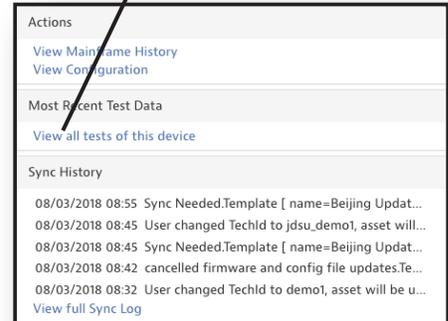


## View Test Data

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

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

**View all tests on  
this device**



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

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

Current Filters: Remove all  
Asset Primary Key: 39580

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

Actions For 0 selected record(s)

Download Report

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

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

### View Sync Log

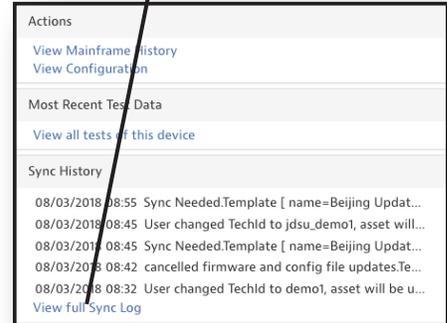
From the Asset Details screen, you can view the configuration sync history of the device.

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

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

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

**View Full Sync Log**

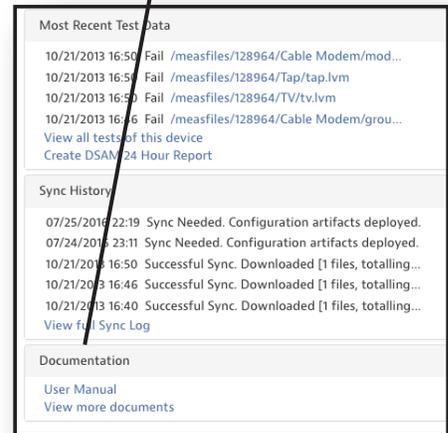


## View Documentation

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

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

## View Documentation

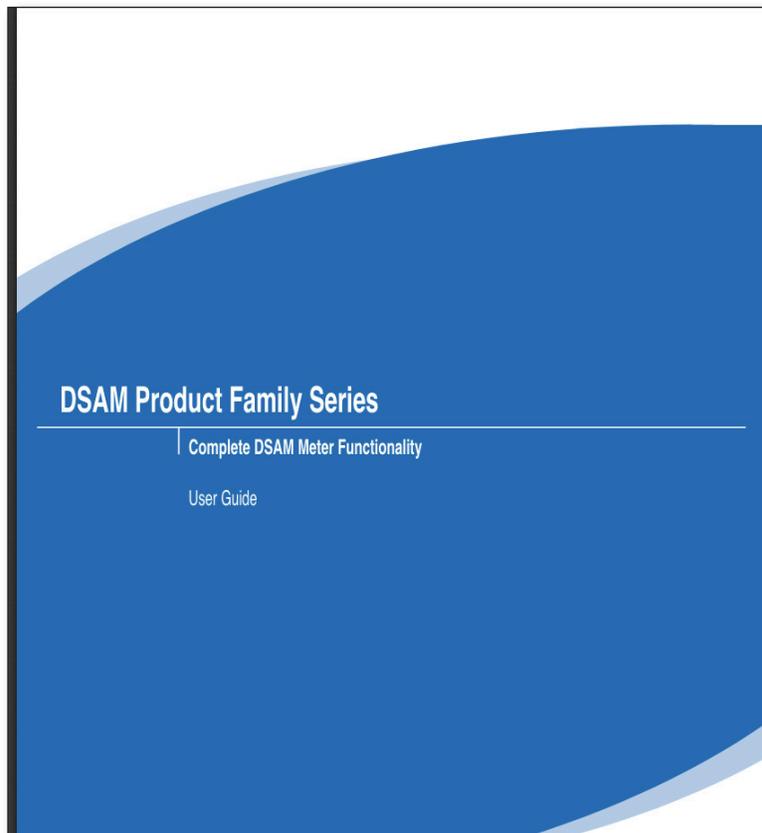


The screenshot shows a mobile interface with three sections: 'Most Recent Test Data', 'Sync History', and 'Documentation'. A callout box with the text 'View Documentation' points to the 'User Manual' link in the 'Documentation' section.

Most Recent Test Data	
10/21/2013 16:50	Fail /measfiles/128964/Cable Modem/mod...
10/21/2013 16:50	Fail /measfiles/128964/Tap/tap.lvm
10/21/2013 16:50	Fail /measfiles/128964/TV/tv.lvm
10/21/2013 16:46	Fail /measfiles/128964/Cable Modem/grou...
<a href="#">View all tests of this device</a>	
<a href="#">Create DSAM 24 Hour Report</a>	

Sync History	
07/25/2013 22:19	Sync Needed. Configuration artifacts deployed.
07/24/2013 23:11	Sync Needed. Configuration artifacts deployed.
10/21/2013 16:50	Successful Sync. Downloaded [1 files, totalling...
10/21/2013 16:46	Successful Sync. Downloaded [1 files, totalling...
10/21/2013 16:40	Successful Sync. Downloaded [1 files, totalling...
<a href="#">View full Sync Log</a>	

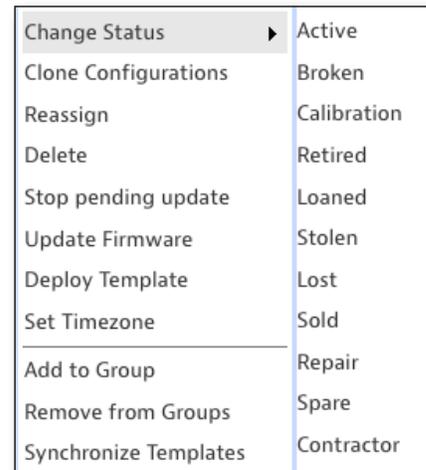
Documentation	
<a href="#">User Manual</a>	
<a href="#">View more documents</a>	



## Changing Asset Status

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

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



## Reassigning an Asset

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

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

*Assign to me*

**REASSIGN ASSET**

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

**ORGANIZATIONS**

Search for an Organization

Expand All Collapse All

Stage JDSU Demo1

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

**People (323)**

Page 1 of 22

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

Viewing 323 record(s) of 323

Page 1 of 22

Reassign Cancel

### NOTE:



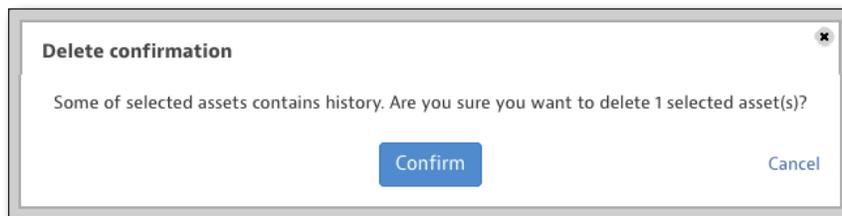
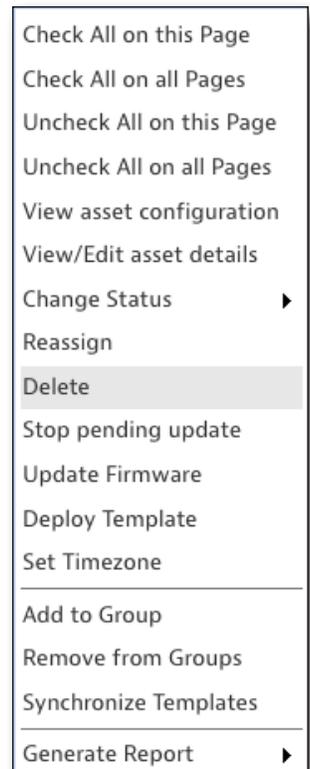
**You can also assign the asset to yourself by selecting *Assign to me* at the top right corner.**

- When done, click **Confirm**.



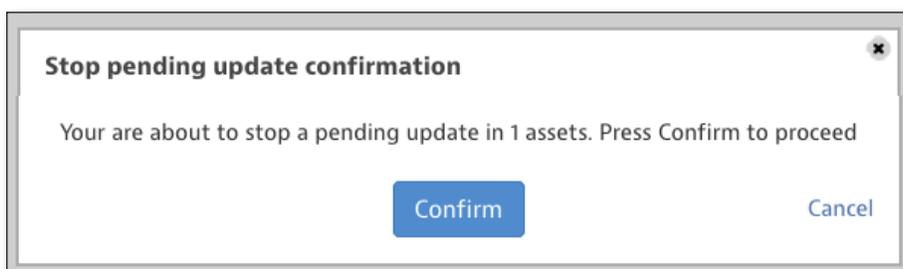
## Deleting an Asset

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



## Stop Pending Update

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



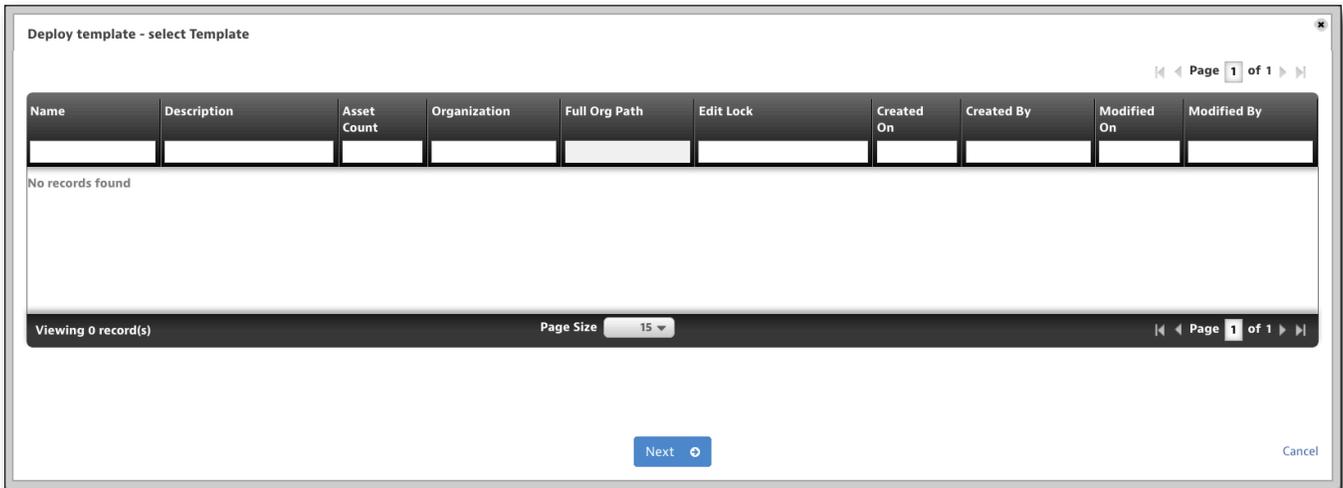
## Update Firmware

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

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

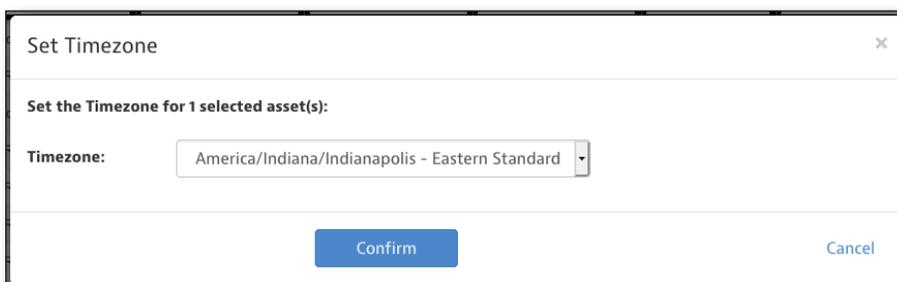
## Deploy Template

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

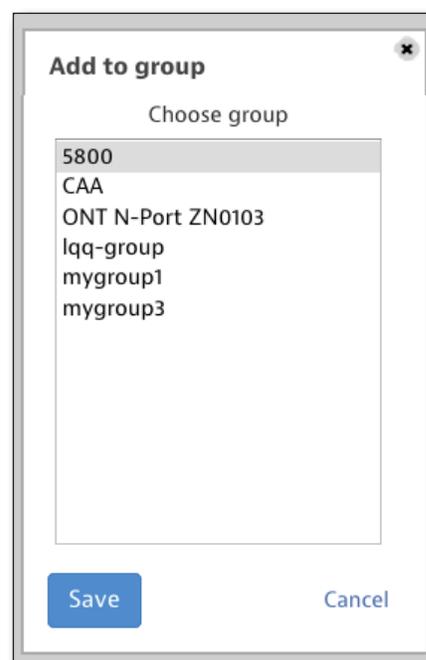
1. From the Assets List, select the checkbox next to the asset (or assets) you want to set the timezone.
2. Right-click the item (or use the **Action** dropdown) and select *Set Timezone*. The Set Timezone screen is displayed.
3. Select the timezone from the dropdown and click **Confirm**.



## Add to Group

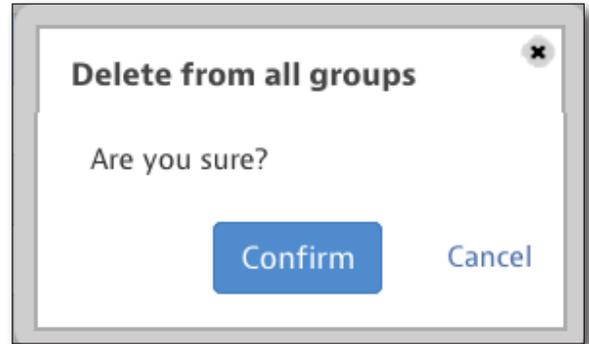
Asset groups provide a way to organize your assets for easy management and deployment.

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**.



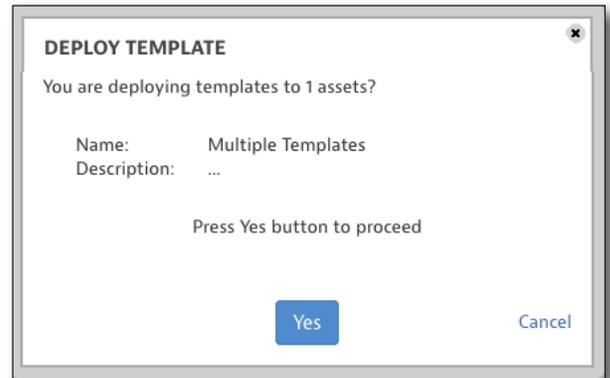
## Remove from Groups

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 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.
- 2. Right-click the item (or use the **Action** dropdown) and select *Generate Report*, then choose *Utilization* or *Installed Options*.

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

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

**NOTE:**



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

**Generate Utilization Report**

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

\* Asset Type: T-BERD/MTS 8000  
\* Catalog Number: [Dropdown]  
\* Time Period: Last 30 days [Dropdown]

[View Report](#) [Cancel](#)

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

**Installed Options Report** [Download Report](#) ReportDate: 1/25/19, 2:35 PM

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

## Options

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

ASSIGN FLOATING SW OPTIONS TO - T-BERD 8000E - UID: T-BERD 8000E\_947

Please select options to deploy and press next

Option	Type	Expiry Date	Description	Organization Available Name	Assign Option	Return Date	Duration	Quantity	Status	Email Again
No records found										

Next Cancel

Floating Options list

ASSIGN SOFTWARE OPTIONS - T-BERD 8000E - UID: T-BERD 8000E\_947

Please select options to deploy and press next

Option	Type	Description	Organization Name	Available	Assign	Option Expiration Date	Quantity	Status	Email Again
Anywhere,SMART_ACCE...	PERMANENT	Anywhere,SMART_ACCESS_L1		0 of 0	<input checked="" type="checkbox"/>			Deployed	
OTDR,SMARTLINK	PERMANENT	OTDR,SMARTLINK		0 of 0	<input checked="" type="checkbox"/>			Deployed	

Next Cancel

Software Options list

## Adding New Assets

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

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

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

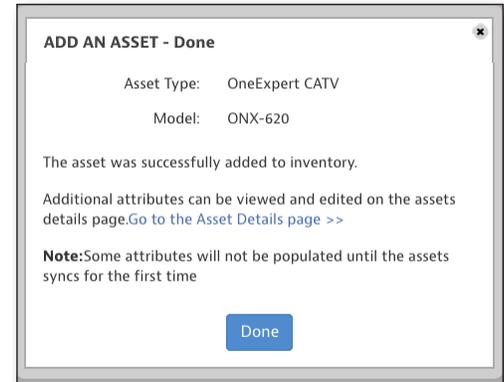
2. Select the asset type and model, then click **Next**. The Asset Details screen appears.

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

Tech ID	First Name	Last Name	Login Name	Role	Organization
demo1	JDSU	Demo1	jdsu_demo1@jdsu...	Administrator	Stage_JDSU Demo1
jdsu_demo10	JDSU_demo1_first	JDSU_demo1_last	jdsu_demo10@jdsu...	Technician2	Stage_JDSU Demo1
fp47637	Yvan	Frosio	dsam1@jdsu.com	Administrator	Stage_JDSU Demo1
l6d1	l6d1_first	l6d1_last	l6d1_16653523	Unidentified TechId	Stage_JDSU Demo1
58729	58729_first	58729_last	58729_16653523	Unidentified TechId	Stage_JDSU Demo1
57162	qinqn	liu	qinqn@jdsu.com	Administrator	Stage_JDSU Demo1
cu57670	lang	cut	lang.cut@jdsu.com	Technician	Stage_JDSU Demo1
lq	Khalid	16653523	kq16653523@jdsu...	Administrator	Stage_JDSU Demo1
59075	Yoo-Chul	Shin	yoo-chul.shin@jdsu...	Administrator	Stage_JDSU Demo1
yoochul	YooChul_first	YooChul_last	yoochul_16653523	Unidentified TechId	Stage_JDSU Demo1
yashvi	YCSHN_first	YCSHN_last	yashvi_16653523	Unidentified TechId	Stage_JDSU Demo1
yashin	YCSHN_first	YCSHN_last	yashin_16653523	Unidentified TechId	Stage_JDSU Demo1
yes	YCS_first	YCS_last	yes_16653523	Unidentified TechId	Stage_JDSU Demo1
jdsu_demo	JDSU_Demo_first	JDSU_Demo_last	jdsu_demo_16653...	Unidentified TechId	Stage_JDSU Demo1
47158	47158_first	47158_last	47158_16653523	Unidentified TechId	Stage_JDSU Demo1

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

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



## Importing Assets

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

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

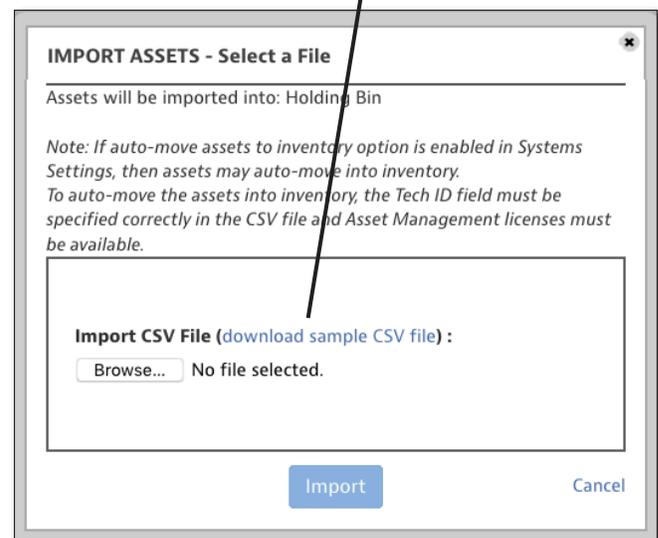
Make sure you retain the header row and enter the data fields starting on row 2, as follows:

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

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

The assets will be imported into the Holding Bin.

### Download sample CSV



### **NOTE:**



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

***The Tech ID field must be specified correctly in the CSV file and Asset Management licenses must be available for this to happen.***

## 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.

The screenshot shows the 'MANAGE ASSET TYPES' interface. On the left, there is a dropdown menu for '1. Asset Class' currently set to 'BASIC'. In the center, '2. Asset Type' is a list with items: 123, 356, 987, instrument1, Locator, and Test B. Above this list are icons for edit, delete, and '+ Add'. On the right, '3. Asset Model (optional)' shows '180 DSP' with edit, delete, and '+ Add' icons. A blue 'Done' button is located at the bottom center.

### 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.

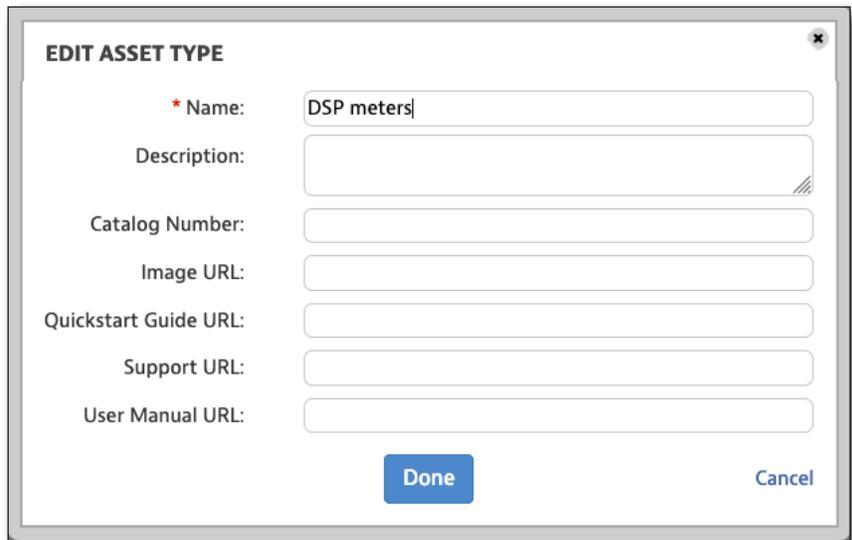
The screenshot shows the 'CREATE ASSET TYPE' form. It has several input fields: '\* Name:' (containing 'DSP meters'), 'Description:', 'Catalog Number:', 'Image URL:', 'Quickstart Guide URL:', 'Support URL:', and 'User Manual URL:'. At the bottom, there are two buttons: a blue 'Done' button and a 'Cancel' button.

This is a zoomed-in view of the '2. Asset Type' list from the previous screenshot. The list contains: 123, 356, 987, DSP meters (highlighted in blue), instrument1, and Locator. The '+ Add' button is visible at the top right of the list.

### Editing Asset Types

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

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



**EDIT ASSET TYPE**

\* Name: DSP meters

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

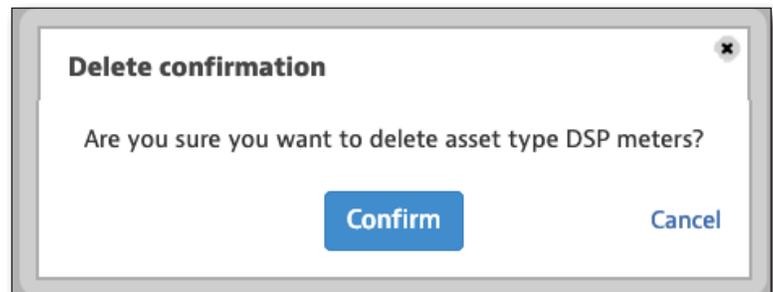
Support URL:

User Manual URL:

Done Cancel

### Deleting Asset Types

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



**Delete confirmation**

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

Confirm Cancel

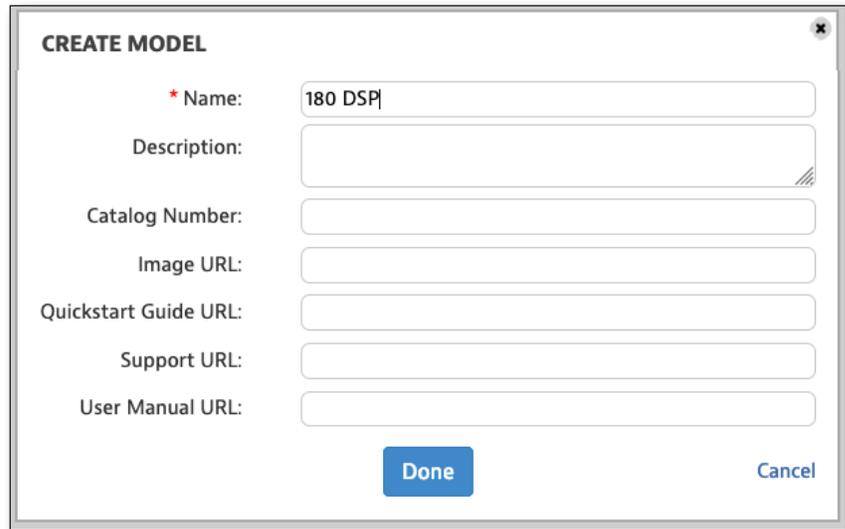
## Asset Models

### *Adding Asset Models*

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

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

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



**CREATE MODEL**

\* Name: 180 DSP

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

Support URL:

User Manual URL:

Done Cancel



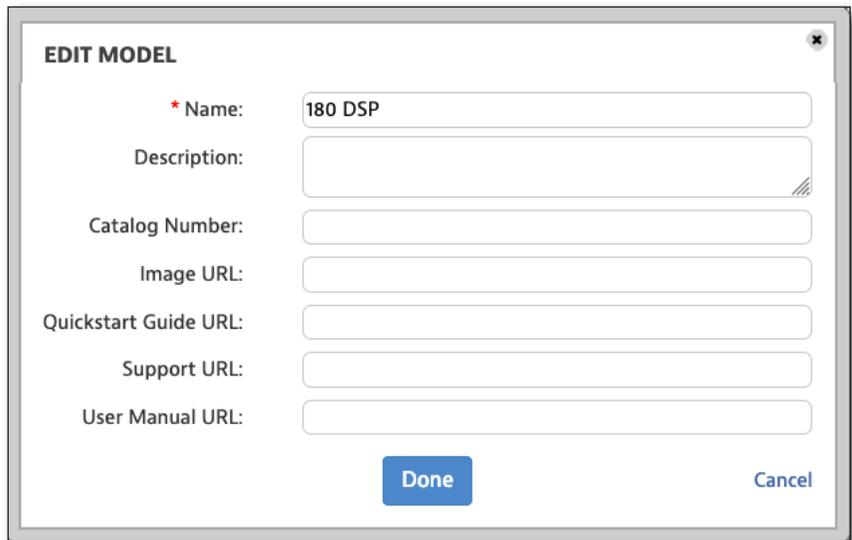
3. Asset Model (optional)

180 DSP

### Editing Asset Models

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

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



**EDIT MODEL**

\* Name: 180 DSP

Description:

Catalog Number:

Image URL:

Quickstart Guide URL:

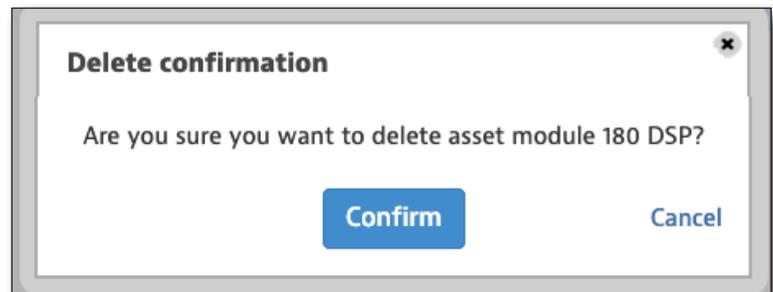
Support URL:

User Manual URL:

Done Cancel

### Deleting Asset Models

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



**Delete confirmation**

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

Confirm Cancel

## Updating Firmware

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

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

See *Managing Firmware Versions on page 38* and *Firmware Management on page 189*.

### Online Updates

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

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

**UPDATE FIRMWARE - Select an update method**

Select a method and press next button to proceed

Select an update method:  Online updates  Upload package

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

Next

3. Select a package you want to download.

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

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

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

**UPDATE FIRMWARE - Choose an update package**

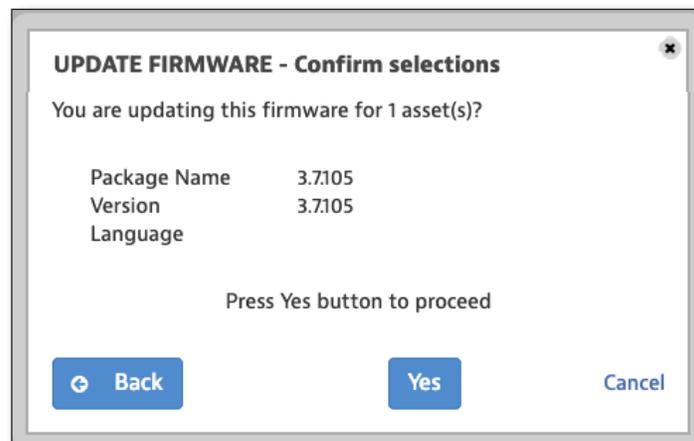
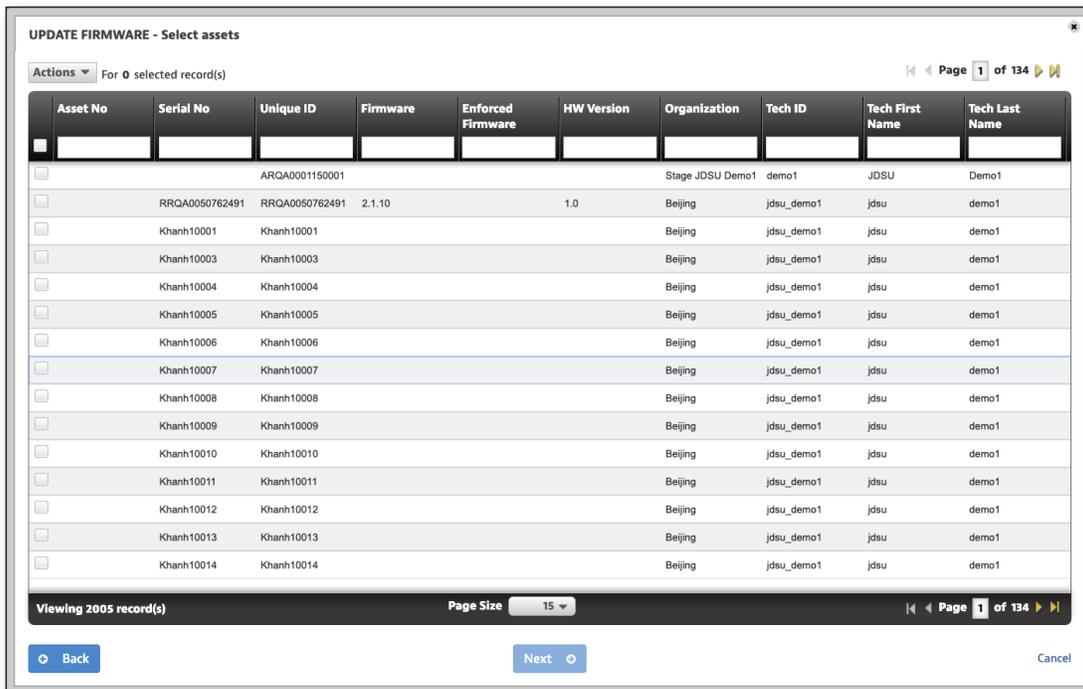
When downloading a firmware package, please unzip and follow instructions in the "readme" file

Enforce Firmware Version

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

Back Next

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



## Downloading to a USB Flash Drive

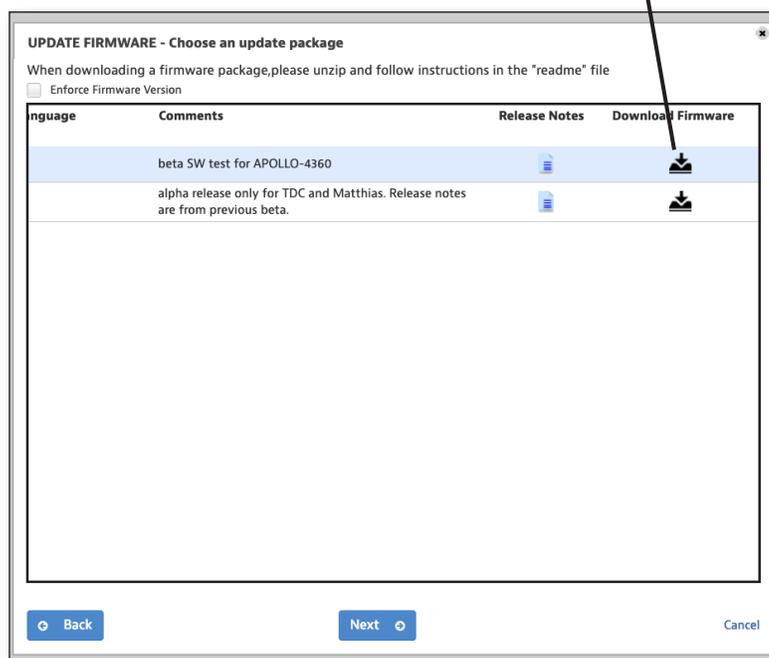
For instruments that support updating the firmware via USB, you can also download packages to your PC. This method is not recommended.

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

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

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

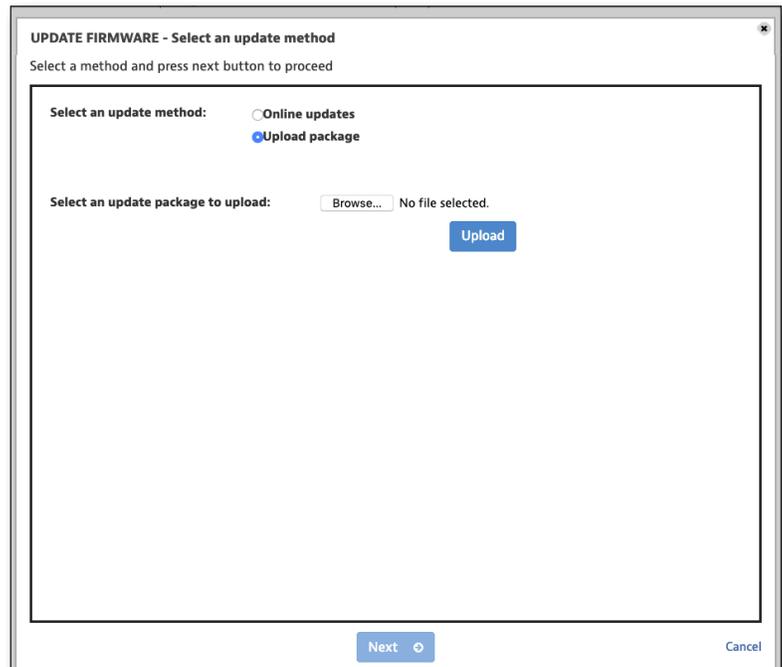
**Download firmware**



## Uploading Packages

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

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



## Managing Configuration Templates

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

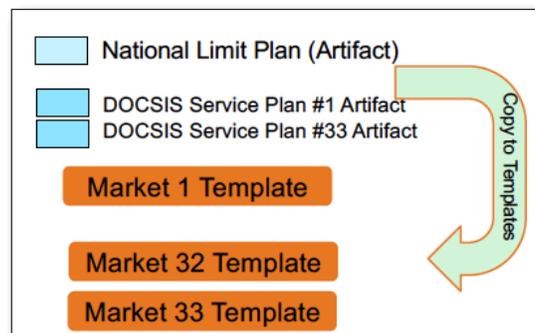
Select the **Assets** tab, then select *Manage Templates*, and finally your asset type. The Manage Templates screen appears, as shown below.

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

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

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

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



**Global Archives**
**New Template**

**Manage Templates: OneExpert CATV** change

Current Filters Remove all

Auto Deploy Report Linked Artifact Report New Template

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

Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modi
<input type="checkbox"/> lqq_a1		0	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	10/19/2016 05...	qinqin.liu@viavisolutions...	07/19/2018 08...	jdsu.d
<input type="checkbox"/> Khanh East Region LP	East Region LP	1	East Region	Stage JDSU Demo1.Eas...	Anyone	07/19/2018 15...	jdsu.demo1@jdsu.com	07/19/2018 15...	jdsu.d
<input type="checkbox"/> Beijing	Beijing	928	Beijing	Stage JDSU Demo1.Beij...	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/20/2018 14...	jdsu.d
<input type="checkbox"/> Khanh Top Level	Top Level	1	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/19/2018 21...	jdsu.d
<input type="checkbox"/> East Lower 1	East Lower 1	1	East Reg1 SubReg1	Stage JDSU Demo1.Eas...	Anyone	07/20/2018 17...	jdsu.demo1@jdsu.com	07/20/2018 17...	jdsu.d
<input type="checkbox"/> Beijing Update Test	Beijing Update Test	2,001	Beijing	Stage JDSU Demo1.Beij...	Anyone	08/02/2018 08...	jdsu.demo1@jdsu.com	08/03/2018 08...	jdsu.d
<input type="checkbox"/> tptest	tptest	0	apitest	Stage JDSU Demo1.apit...	Anyone	08/02/2018 09...	ted.robinson@stage.de...	08/07/2018 09...	ted.ro
<input type="checkbox"/> Tdmk2	Tdmk2	0	TDMarket1	Stage JDSU Demo1.apit...	Anyone	08/03/2018 14...	ted.robinson@stage.de...	08/03/2018 14...	ted.ro

Viewing 8 record(s) Page Size 15 Page 1 of 1

## Adding New Templates

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

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

The new configuration template will appear in the list.

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

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

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



**NOTE:**

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

## Editing 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.

Manage Templates > Khanh East Region LP

Khanh East Region LP Edit  
East Region LP

Organization: East Region

View Assets(0) Deploy Template

Limit Plan Global Archive New Limit Plan

Template Sections

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

Configuration Artifacts

Actions

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

View Assets(0) Deploy Template

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

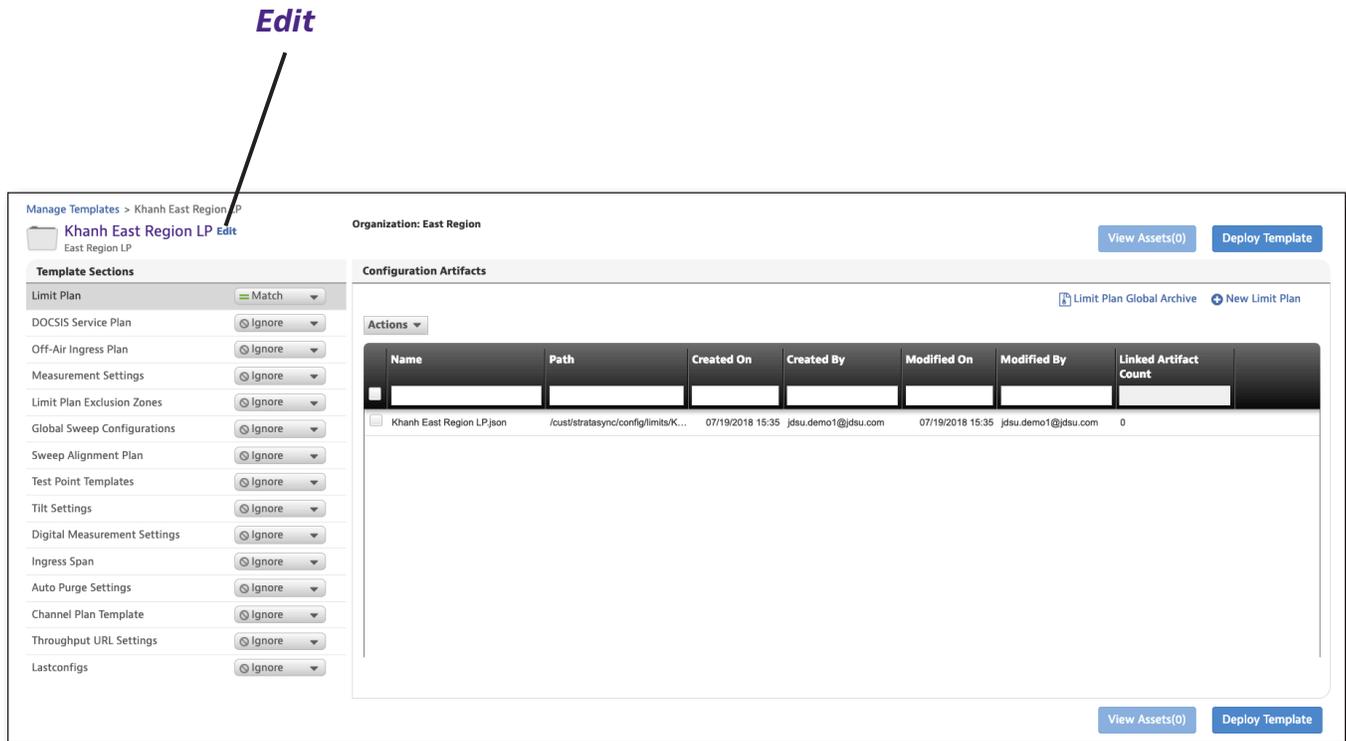
Select *Match* to include the setting in the template, or *Ignore* to temporarily disable it, as necessary.

Template Sections

- Limit Plan **Match**
- DOCSIS Service Plan **Ignore**
- Off-Air Ingress Plan **Match**

## Editing Template Details

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



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

**NEW ONEEXPERT CATV TEMPLATE** ✕

Edit the name and description for this template

\* Name

Description

\* Organization

Edit By

## Edit By

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

- **Only Me** – Allows editing for the creator or person with permissions to edit only. 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.

**NEW ONEEXPERT CATV TEMPLATE**

Edit the name and description for this template

\* Name: Khanh East Region LP

Description: East Region LP

\* Organization: East Region

Edit By: **Anyone** (dropdown menu open showing 'Anyone' and 'Only Me')

### Edit Lock column

**Manage Templates: OneExpert CATV** change

Current Filters Remove all

Global Archives

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

Actions For 0 selected record(s)

Auto Deploy Report Linked Artifact Report New Template

Name	Description	Asset Count	Organization	Full Org Path	Edit Lock	Created On	Created By	Modified On	Modi
<input type="checkbox"/> lqq_a1		0	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	10/19/2016 05...	qinqin.lu@viasolutions...	07/19/2018 08...	jdsu.d
<input type="checkbox"/> Khanh East Region LP	East Region LP	1	East Region	Stage JDSU Demo1.Eas...	Anyone	07/19/2018 15...	jdsu.demo1@jdsu.com	07/19/2018 15...	jdsu.d
<input type="checkbox"/> Beijing	Beijing	928	Beijing	Stage JDSU Demo1.Beij...	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/20/2018 14...	jdsu.d
<input type="checkbox"/> Khanh Top Level	Top Level	1	Stage JDSU Demo1	Stage JDSU Demo1	Anyone	07/19/2018 21...	jdsu.demo1@jdsu.com	07/19/2018 21...	jdsu.d
<input type="checkbox"/> East Lower 1	East Lower 1	1	East Reg1 SubReg1	Stage JDSU Demo1.Eas...	Anyone	07/20/2018 17...	jdsu.demo1@jdsu.com	07/20/2018 17...	jdsu.d
<input type="checkbox"/> Beijing Update Test	Beijing Update Test	2,001	Beijing	Stage JDSU Demo1.Beij...	Anyone	08/02/2018 08...	jdsu.demo1@jdsu.com	08/03/2018 08...	jdsu.d
<input type="checkbox"/> tpilest	tpilest	0	apilest	Stage JDSU Demo1.apil...	Anyone	08/02/2018 09...	ted.robinson@stage.de...	08/07/2018 09...	ted.rot
<input type="checkbox"/> Tdmk2	Tdmk2	0	TDMarket1	Stage JDSU Demo1.apil...	Anyone	08/03/2018 14...	ted.robinson@stage.de...	08/03/2018 14...	ted.rot

Viewing 8 record(s) Page Size 15 Page 1 of 1

## Viewing Associated Assets

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

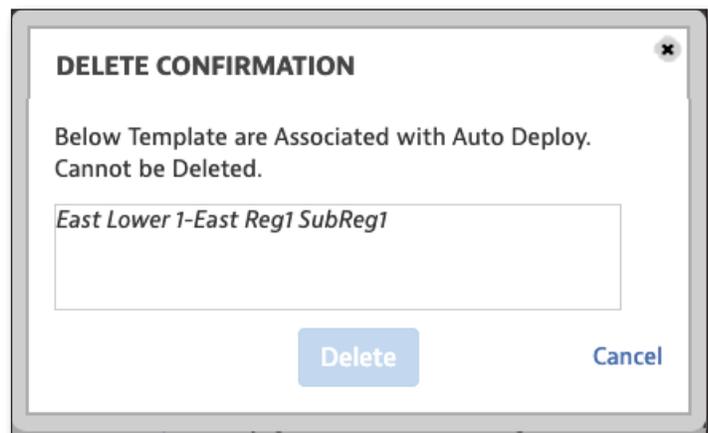
You can also click the asset number to view the assets, as well.

The screenshot displays the 'Associated Assets' screen. At the top, there are navigation options: 'Default View [unsaved changes]', 'Save view', 'Save view as...', 'Customize view', and 'Schedule Email'. Below this, there are filters for 'Current Filters' (Remove all) and 'View Asset Group: None'. An 'Actions' dropdown is visible for '0 selected record(s)'. The main table has the following columns: Asset class, Asset Type, Model, Unique ID, Serial No, Organization, Tech ID, Tech First Name, Tech Last Name, Asset Status, and La St. The table lists 15 assets, all of which are 'OneExpert CATV' with model 'ONX-620' and organization 'Beijing'. The asset statuses are mostly 'Active', with one 'Broken'. The page footer indicates 'Viewing 2001 record(s)' and 'Page Size 15', with 'Page 1 of 134'.

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

## Deleting 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 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.

*Deploy Template*

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

- Organization:** East Region
- Template Sections:** A list of template sections with "Ignore" buttons, including Limit Plan (set to Match), DOCSIS Service Plan, Off-Air Ingress Plan, Measurement Settings, Limit Plan Exclusion Zones, Global Sweep Configurations, Sweep Alignment Plan, Test Point Templates, Tilt Settings, Digital Measurement Settings, Ingress Span, Auto Purge Settings, Channel Plan Template, Throughput URL Settings, and Lastconfigs.
- Configuration Artifacts:** A table with columns: Name, Path, Created On, Created By, Modified On, Modified By, and Linked Artifact Count. One artifact is listed: "Khanh East Region LP.json" with path "/cus/stratsync/config/limits/K...", created on 07/19/2018 15:35 by jdsu.demo1@jdsu.com, modified on 07/19/2018 15:35 by jdsu.demo1@jdsu.com, and a linked artifact count of 0.
- Buttons:** "View Assets(0)" and "Deploy Template" buttons are present in the top right and bottom right of the Configuration Artifacts section.

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



## Auto Deploy Settings

You can set up auto deploy settings for any 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**

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

When done, click **Save**.

**Select Organization**

Auto Deploy Settings for East Lower 1 ×

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

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

[+ Select Organization](#)

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

Save
Cancel

# Managing Asset Options

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

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

The screenshot displays the 'Manage Software Options' interface. At the top, there are navigation links: 'Default View', 'Save view', 'Save view as...', 'Customize view', and 'Schedule Email'. On the right, there are links for 'Import Options' and 'Download Report'. A 'Floating Option Utilization' chart is also visible. Below these are 'Current Filters' and 'Favorite Views' sections. The main area is a table with the following columns: License Type, Catalog Number, Description, Organization Name, Full Org Path, Asset Type, Expiration Date, Total Quantity, Available, Assigned, Orders, and Duration. The table contains 18 rows of data, including various license types like Permanent, Floating, and HST3000S-VMOS. At the bottom, it shows 'Viewing 257 record(s)' and a 'Page Size' dropdown set to 15.

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

## Assigning an Option

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

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

### Assign column

MANAGE PERMANENT OPTION POOL - Catalog No: C510GELAN-U1

Description: 10GigE LAN Ethernet

Using the assign check boxes choose which assets should be assigned a permanent license

99 of 100 licenses available

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

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

Click **Confirm**.

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

**DEPLOY OPTION - C510GELAN-U1**

You are deploying the option to **3** asset(s).

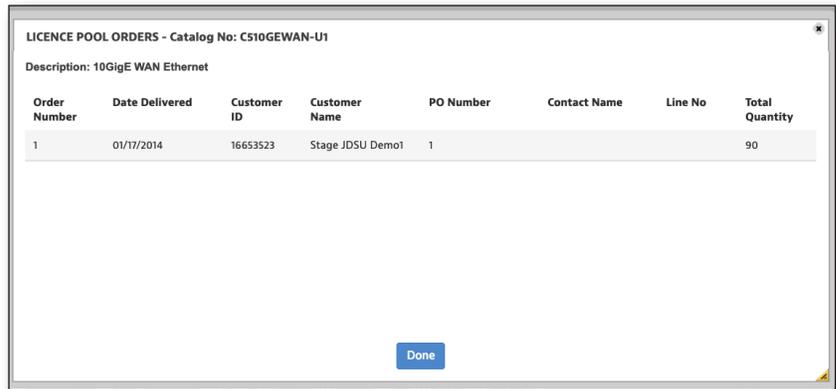
Send an email to [tech1@abc.com](mailto:tech1@abc.com) with challenge code(s)  
Note: click on email link to change destination.

Are you sure you want to proceed?

## Viewing Orders

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

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

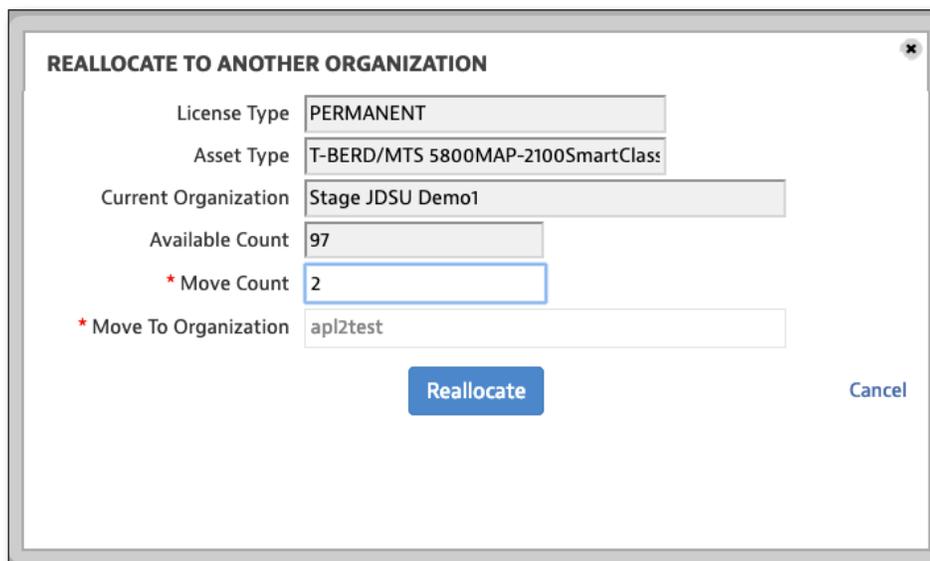


Order Number	Date Delivered	Customer ID	Customer Name	PO Number	Contact Name	Line No	Total Quantity
1	01/17/2014	16653523	Stage JDSU Demo1	1			90

## Moving an Option to another Organization

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

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



**REALLOCATE TO ANOTHER ORGANIZATION**

License Type: PERMANENT

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

Current Organization: Stage JDSU Demo1

Available Count: 97

\* Move Count: 2

\* Move To Organization: apl2test

Reallocate Cancel

## Importing Options

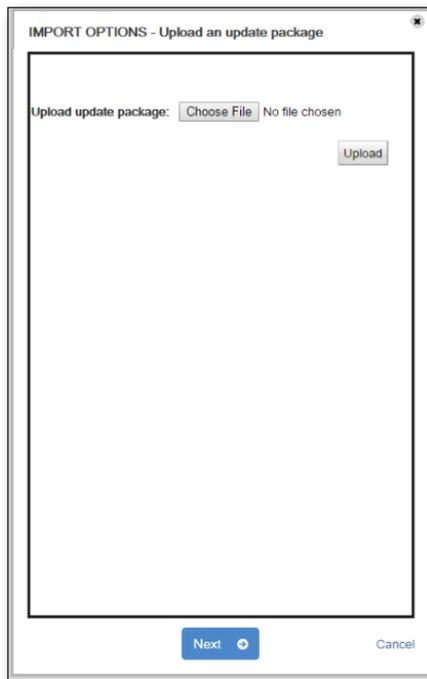
You can import the list of software options as an bundle file and then deploy to your assets. From the Manage Asset Options screen, select **Import Options** at the top right. The Import Options screen is displayed.

**Import Options**

The screenshot displays the 'Import Options' screen. At the top right, there is a button labeled 'Import Options' with a downward arrow. Below this, there are several utility buttons: 'Floating Option Utilization', 'Download Report', and a page navigation bar showing 'Page 1 of 18'. The main area is a table with the following columns: License Type, Catalog Number, Description, Organization Name, Full Org Path, Asset Type, Expiration Date, Total Quantity, Available, Assigned, Orders, and Duration. The table contains 18 rows of data. On the left side, there is a sidebar with 'Current Filters', 'Favorite Views', 'My Saved views', 'Default View', 'Shared views', and 'Show the view list'. At the bottom, it shows 'Viewing 257 record(s)' and 'Page Size 15'.

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

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



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

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

IMPORT OPTIONS - Select assets

For 1 selected assets

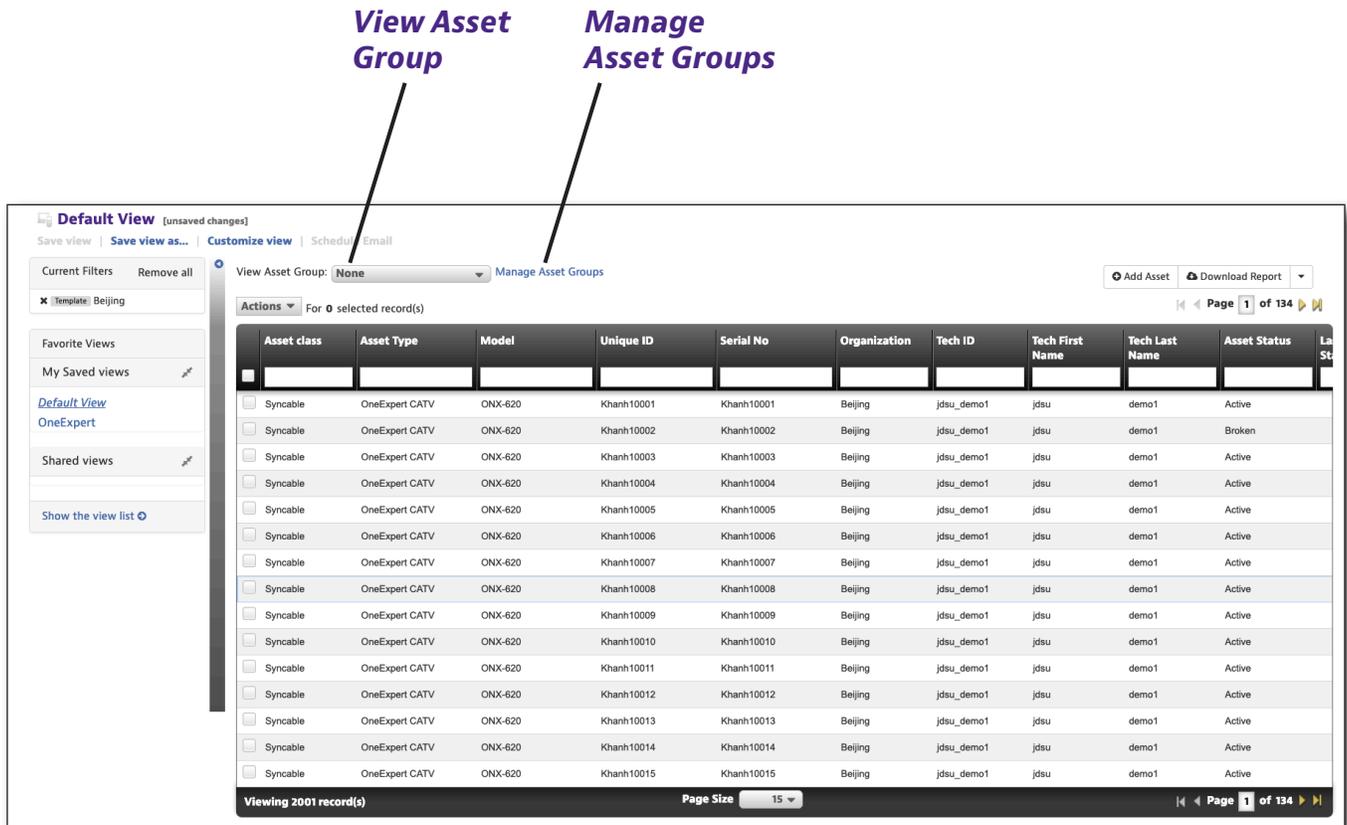
	Asset No	Serial No	SW Version	HW Version	Tech Id	Tech First Name	Tech Last Name
<input checked="" type="checkbox"/>		9220608	SSTest	B4-4-3-2-1	Greg Massey	DSAM	DVT

Viewing 1 records | Page 1 of 1

Back Next Cancel

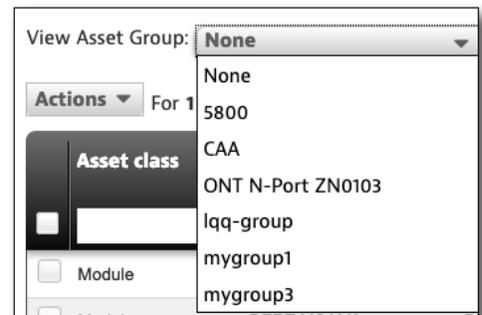
# Managing Asset Groups

This feature allows you to organize your assets for easy management and deployment. Select the **Assets** tab, and then select *Assets List*. The Assets List appears.



## Viewing Asset Groups

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



## Asset Group Management

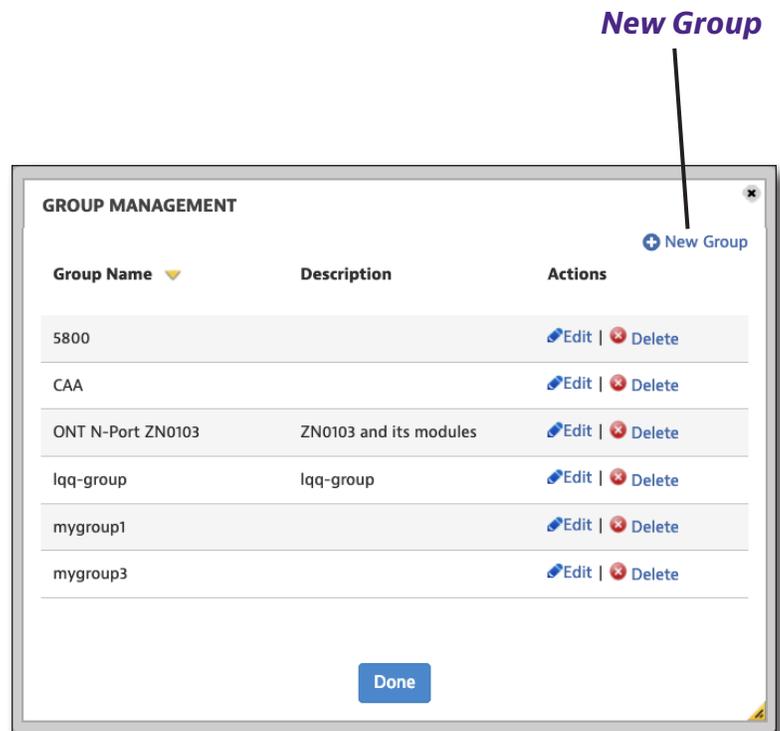
From the Assets List, select **Manage Asset Groups** at the top of the screen. The Group Management screen is displayed.

### Adding New Groups

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

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

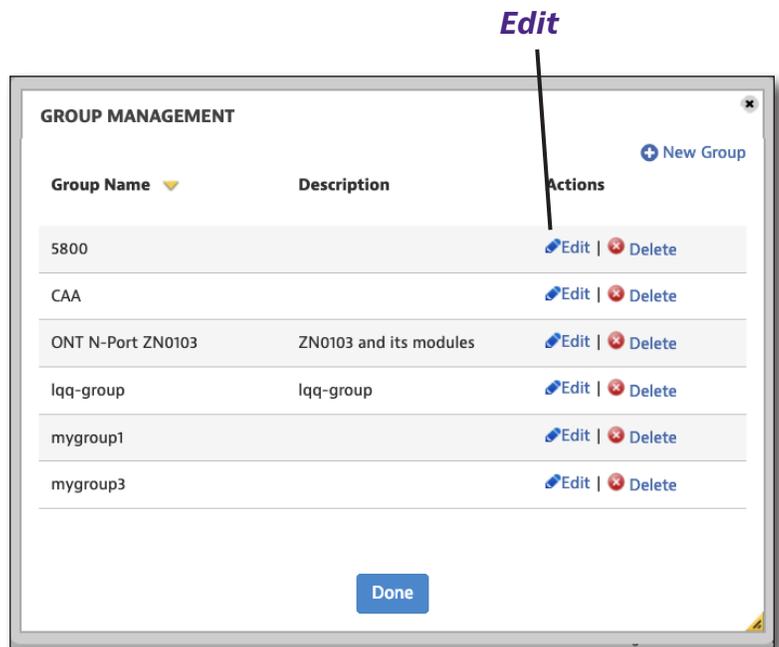
The new group will appear in the list.



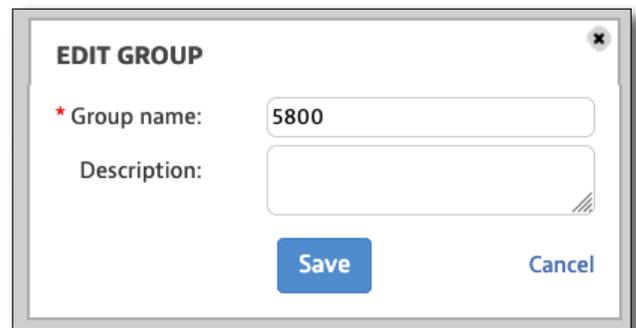
The screenshot shows the 'CREATE A NEW GROUP' dialog box. It has two input fields: 'Group name' (with a red asterisk) and 'Description'. The 'Group name' field contains the text 'B Group East'. Below the input fields are 'Save' and 'Cancel' buttons.

### Editing Groups

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

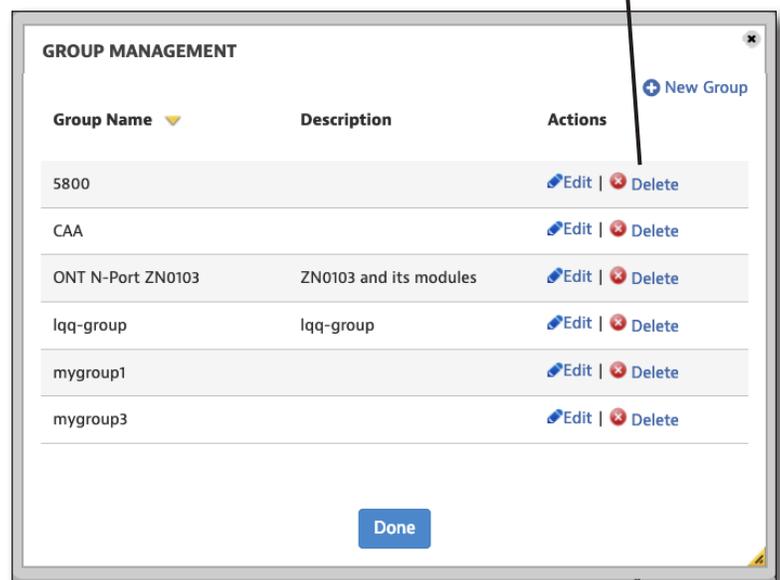


Edit the information as needed, and click **Save**.

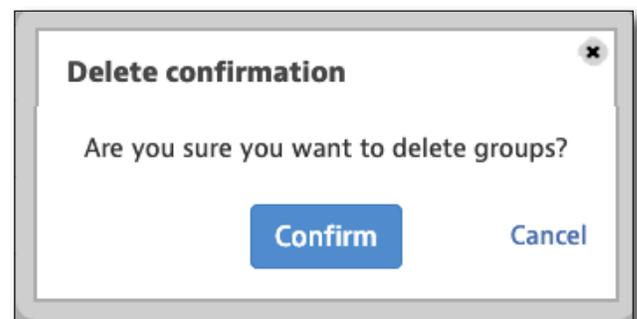


## Deleting Groups

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



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





## Test Data

This chapter covers how to use the Test Data Management features of StrataSync. Topics discussed include the following:

- "Test Data" on page 110
- "Searching and Sorting" on page 111
- "Views" on page 114
- "Test Data List" on page 117

# Test Data

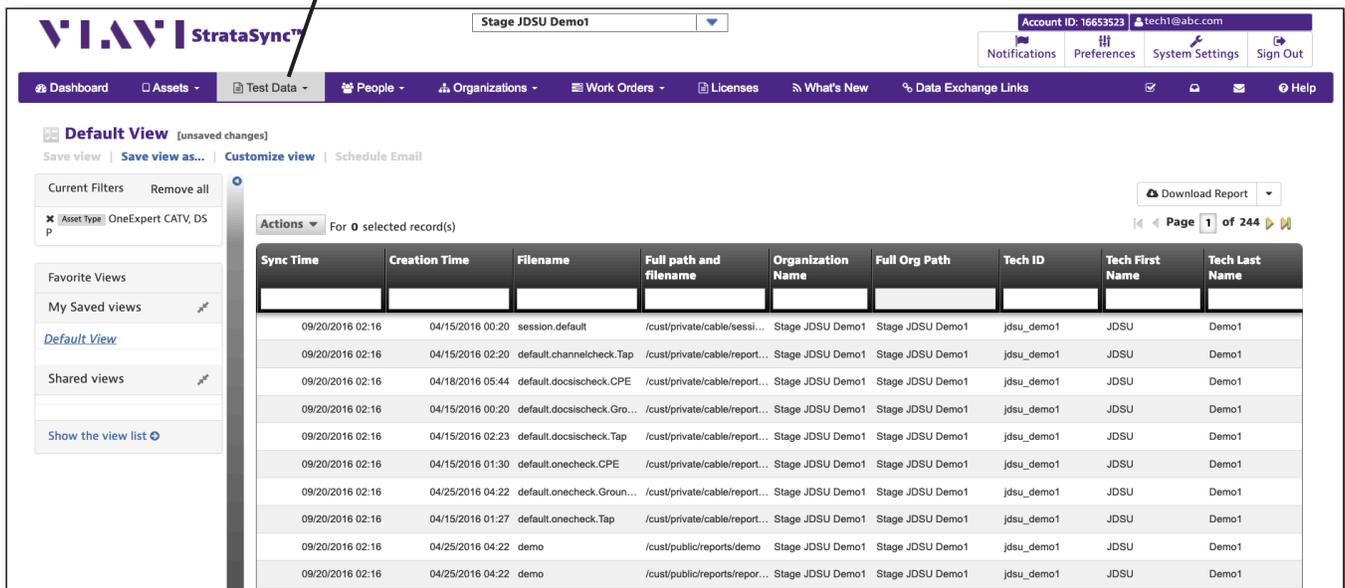
The **Test Data** tab is the hub for all of the test data uploaded from your field instruments to your StrataSync account.

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



**Test Data dropdown menu**

**Test Data tab**



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

## Searching and Sorting

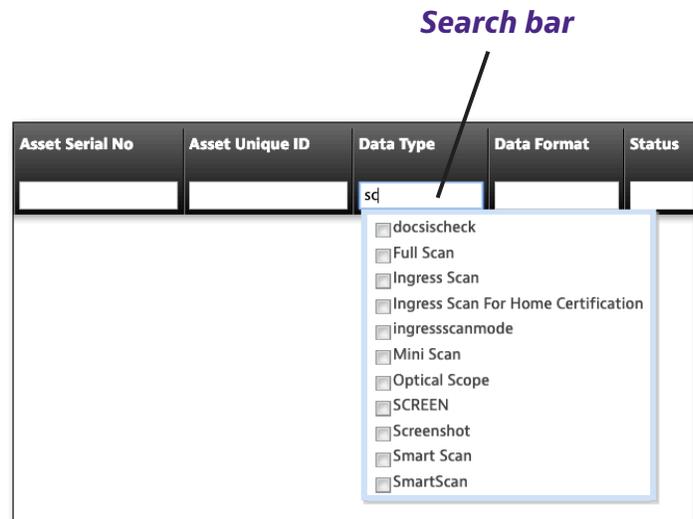
From the Test Data List, you can easily find an asset using the search bar under each of the column headers or the sorting filters.

### Searching

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

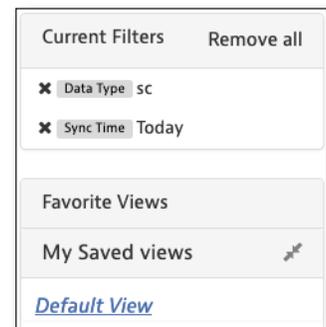
Some of the columns provide dropdowns with relevant options once you start typing.

The available data types are dependent on the selected instruments.



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

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



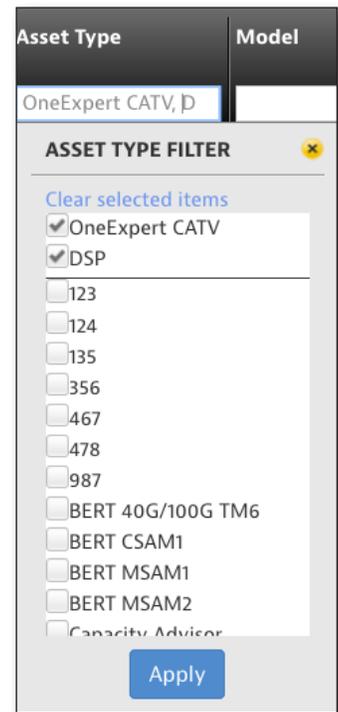
Asset Unique ID	Data Type	Data Format	Status	Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
T-BERD 2000_2805	TESTDATA.OTDR	application/octet-st...	None	10/09/2013 09:45	03/19/2013 11:45	khanih10000002.scr	/useridsku/StrataSyncKh...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

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

### Filtering Multiple Items

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

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



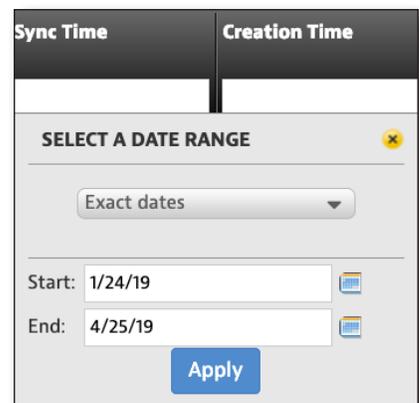
#### NOTE:

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

### Date Filters

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

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



**NOTE:**

**You can save custom filters to a favorite view for easy reference. See [Saving Views on page 115](#).**

## Sorting

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

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

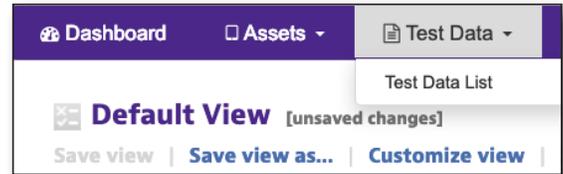


# Views

## Customizing Views

StrataSync gives you the ability to customize your list views.

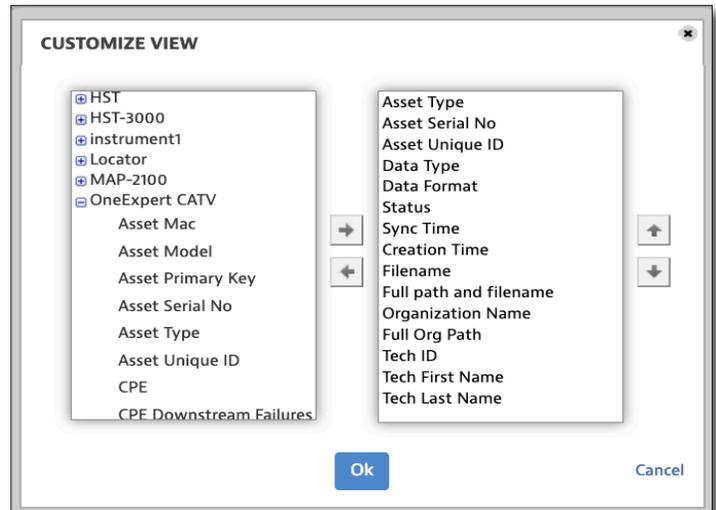
1. Select the **Test Data** tab, and then select *Test Data List*. The Test Data List appears.
2. Select **Customize View** at the upper left of the screen. The Customize View screens appears.



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

Test Data List Default View

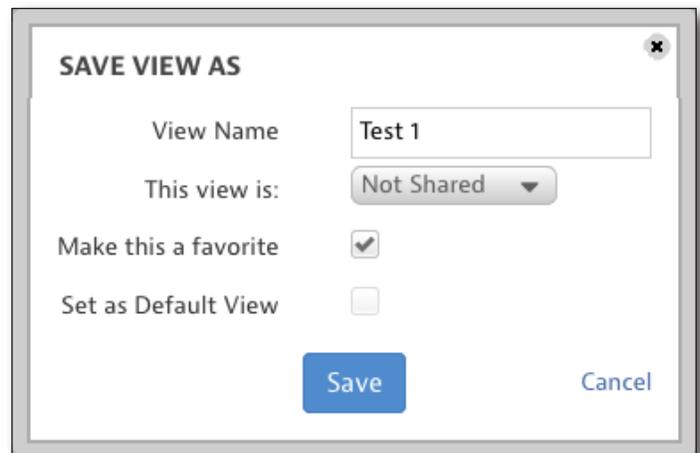
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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



## Saving Views

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

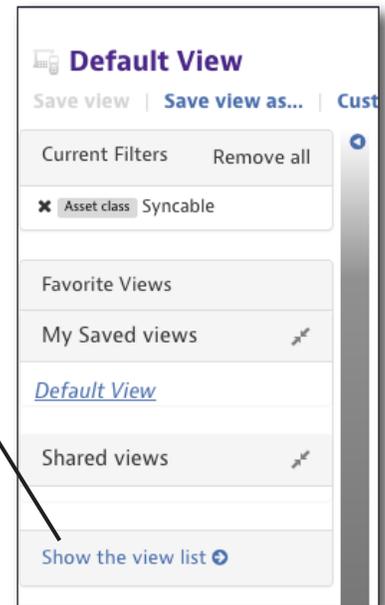
The new view is listed under the Favorite Views section on the left.



## Sharing and Editing Views

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

*Show the view list*



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

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

[Done](#)

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

# Test Data List

## Downloading Test Data

1. From the Test Data List, select a view on the left that includes the asset you want to download or use the filters to find it.
2. Double click the asset data you want to download (or use the Actions dropdown).
3. Choose where you want to save the file.

Stage JDSU Demo1

Account ID: 16653523 | tech1@abc.com

Notifications | Preferences | System Settings | Sign Out

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

Default View [unsaved changes]

Save view | Save view as... | Customize view | Schedule Email

Current Filters Remove all

Asset Type OneExpert CATV, DSP

Favorite Views

My Saved views

Default View

Shared views

Show the view list

Download Report

Page 1 of 244

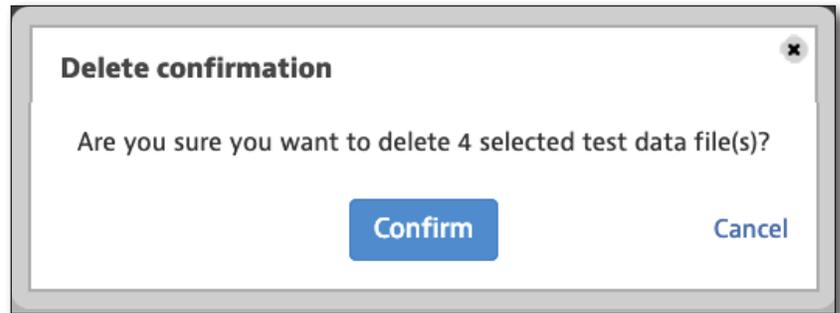
Sync Time	Creation Time	Filename	Full path and filename	Organization Name	Full Org Path	Tech ID	Tech First Name	Tech Last Name
09/20/2016 02:16	04/15/2016 00:20	session.default	/cust/private/cable/sessi...	Stage JDSU Demo1	Stage JDSU Demo1	jdsu_demo1	JDSU	Demo1
09/20/2016 02:16	04/15/2016 02:20	default.channelcheck.Tap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

## 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**.



## People

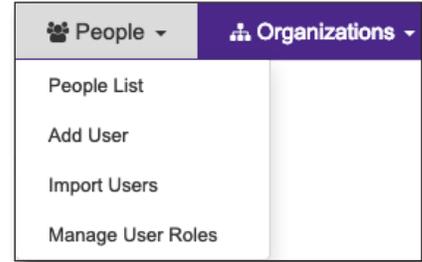
This chapter covers how to use the People Management features of StrataSync. Topics discussed include the following:

- "People" on page 120
- "Searching and Sorting" on page 121
- "Views" on page 124
- "People List" on page 127
- "Adding a User" on page 132
- "Importing Users" on page 136
- "Managing User Roles" on page 137

# People

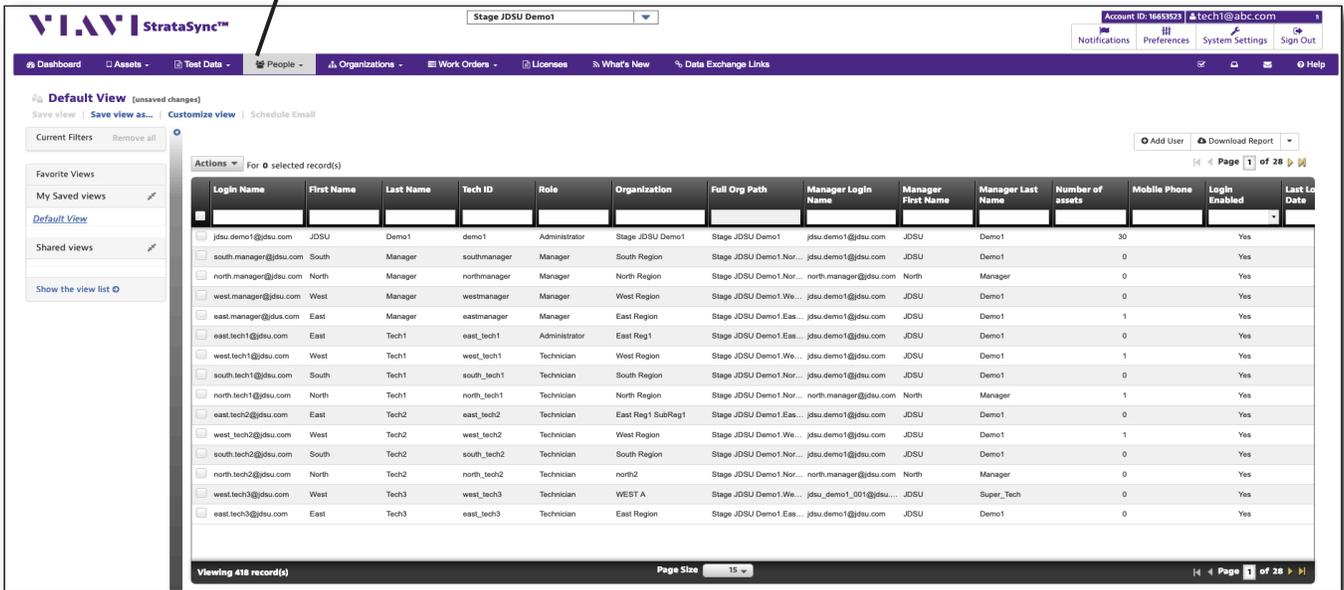
The **People** tab is the hub for all of the user and role management features of your StrataSync account, including: adding and importing users, and managing those users' roles and permissions.

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

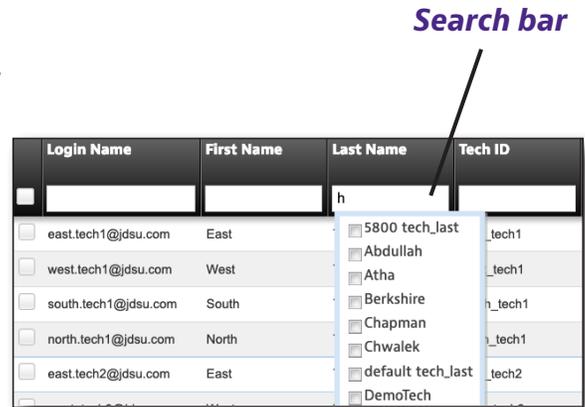
## Searching and Sorting

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

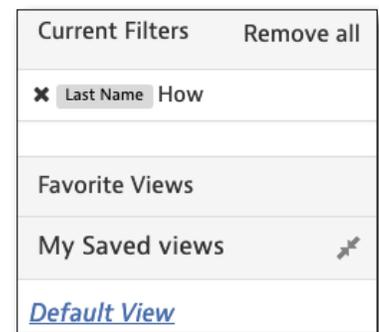
### Searching

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 relevant options once you start typing.



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



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

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

## Filtering Multiple Items

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

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

Role	Organization
Firmware Test	

**ROLE FILTER** ✕

Clear selected items

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

**Apply**

### NOTE:



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

## Date Filters

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

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

None	Login Enabled	Last Login Date

**SELECT A DATE RANGE** ✕

Exact dates

Start: 1/4/19 📅

End: 4/25/19 📅

**Apply**

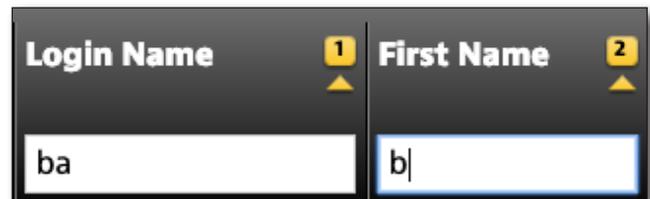
**NOTE:**

*You can save custom filters to a favorite view for easy reference. See [Saving Views on page 125](#).*

## Sorting

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

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

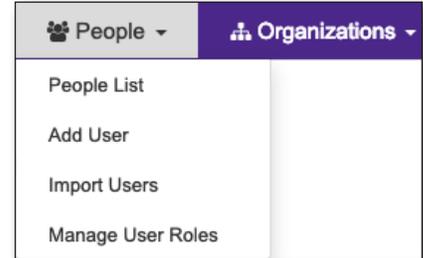


# Views

## Customizing Views

StrataSync gives you the ability to customize your list views.

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

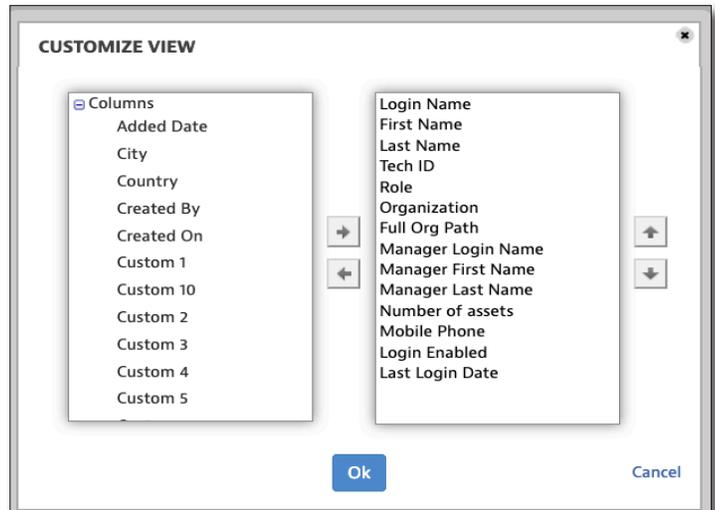


**Save View As**      **Customize View**

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

People List Default View

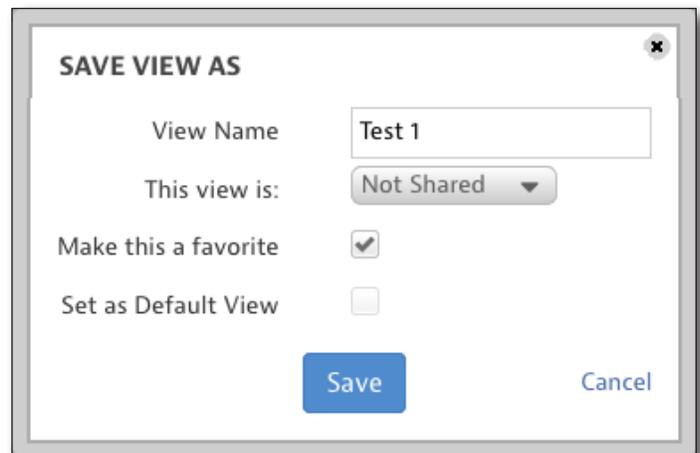
- In the left column, you will see the items to include in your view. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list on the right.
- When done, click **OK**.



## Saving Views

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

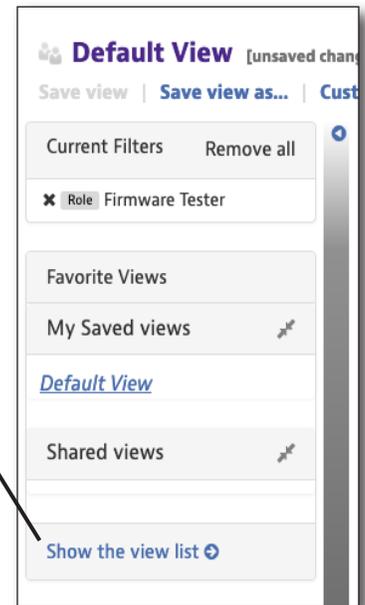
The new view is listed under the Favorite Views section on the left.



## Sharing and Editing Views

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

*Show the view list*



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

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

[Done](#)

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

# People List

## Editing User Details

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

You can change any of the information except the username.

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

People List > east.tech1@jdsu.com

East Tech1 - East.Tech1@jdsu.com Save

User Information

Username: east.tech1@jdsu.com

\* Email:

\* First Name:

\* Last Name:

Unique ID: 8202

\* Employee/Tech ID:

Contact Information

Mobile Phone:

Office Phone:

Street Address:

City:

State:

Postal Code:

Country:

Access and Visibility

Login Enabled:

Visibility Organization: East Reg1

Organization: East Reg1

Actions

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

Attributes

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

### View this User's Assets

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

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

*View this user's assets*

Actions

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

Attributes

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

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

### View this User's Test Data

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

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

*View this user's test data*

Actions

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

Attributes

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

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

## Reset Password

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

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



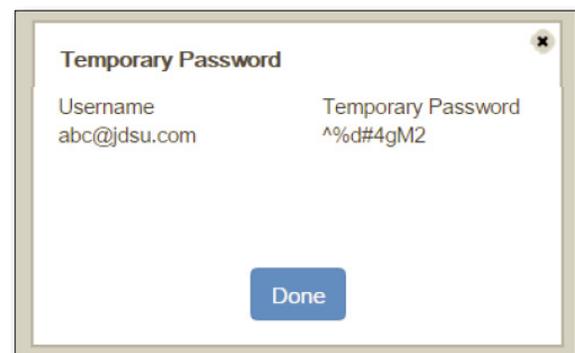
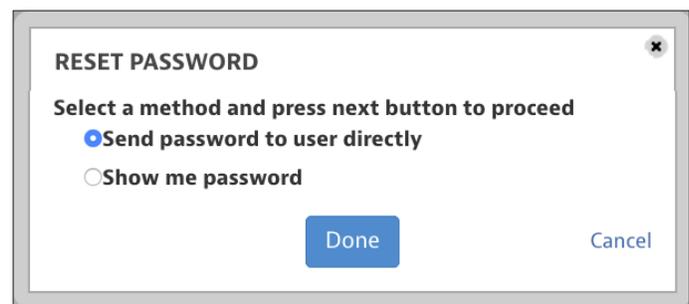
From the **Reset Password** screen, choose whether you want the system to email you the temporary password, or if you want to display it.

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

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

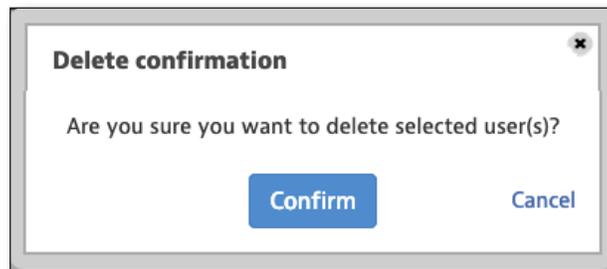
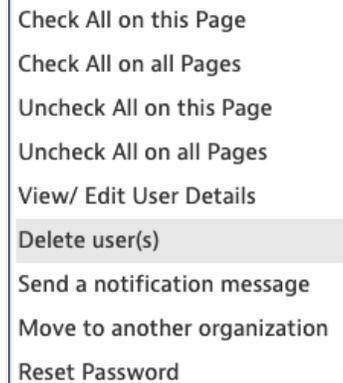
You can also change your password through Preferences. See [Configuration on page 179](#)

**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**.



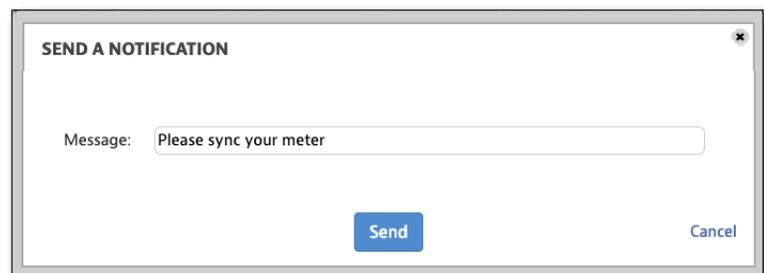
### NOTE:



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

## 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.

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

## Resetting Passwords

Resetting a user's password is similar to the steps covered previously. See [Reset password on page 129](#).

## 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 account 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 account.

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

**ADD USER - Input user details**

**User Information**

\* Username:

\* Email:

\* First Name:

\* Last Name:

\* Employee/Tech ID:

Send email:

Landing Site:

Role:

Login Enabled:  User Information

Visibility Organization: [Stage JDSU Demo1](#)

Organization: [Stage JDSU Demo1](#)

Manager: JDSU Demo1

Contact Information ↕

Other Attributes ↕

Preferences ↕

**Add** Cancel

## Setting Access and Visibility

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

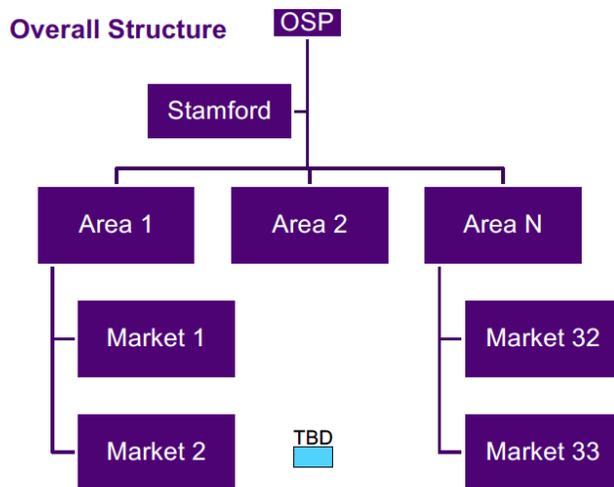
### Changing the Visibility

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

Double click the user to bring up the details screen.

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

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



Example of an organization hierarchical view

Access and Visibility

**Login Enabled:**

**Visibility Organization:** West Region

**Organization:** West Region

**Manager:** JDSU Demo1

Search for an Organization

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

### 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 131](#).

## Adding Additional Visibility

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

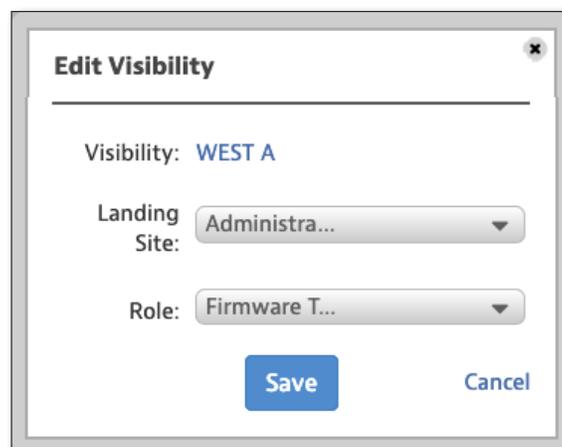
From the People List, select a view on the left that includes the user you want to edit or use the filters to find it.

Double click the user to bring up the details screen.

Under the Additional Visibilities section, click the **Add Visibility** button on the right. The Add Visibility screen appears.

Select a new visibility organization, and use the dropdowns to choose the landing site and role.

When done, click **Save**. Continue to add more visibilities and they will show in the list.



## Assigning a Role

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

### ***Assigning or Changing Role Assignment***

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

Double click the user to bring up the details screen.

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

When done, click **Save**.

### ***Adding Additional Permissions***

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

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

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

When done, click **Save**.

Role

**Landing Site:** Administra... ▼

**Role:** Technician ▼

Move any additional permissions this user requires to the Additional permissions granted

**Additional Permissions:**

Permissions available:		Permissions granted:
<ul style="list-style-type: none"> <li><span style="font-size: small;">⊕</span> API Access</li> <li><span style="font-size: small;">⊕</span> Asset Management</li> <li><span style="font-size: small;">⊕</span> Configuration Management</li> <li><span style="font-size: small;">⊕</span> Data Exchange</li> <li><span style="font-size: small;">⊕</span> Firmware Management</li> <li><span style="font-size: small;">⊕</span> License Management</li> <li><span style="font-size: small;">⊕</span> Options Management</li> <li><span style="font-size: small;">⊕</span> Organization Management</li> <li><span style="font-size: small;">⊕</span> System Settings</li> <li><span style="font-size: small;">⊕</span> Test Data</li> <li><span style="font-size: small;">⊕</span> User Management</li> <li><span style="font-size: small;">⊕</span> Work Order Management</li> </ul>	<div style="margin-bottom: 10px;"><span style="border: 1px solid #ccc; padding: 2px 5px;">→</span></div> <div><span style="border: 1px solid #ccc; padding: 2px 5px;">←</span></div>	<ul style="list-style-type: none"> <li><span style="font-size: small;">⊖</span> Miscellaneous Permissions               <ul style="list-style-type: none"> <li>Schedule View Emails</li> <li>Send Notifications</li> <li>View Summary Panels</li> </ul> </li> <li><span style="font-size: small;">⊖</span> Report Management               <ul style="list-style-type: none"> <li>View Reports</li> </ul> </li> </ul>

## Importing Users

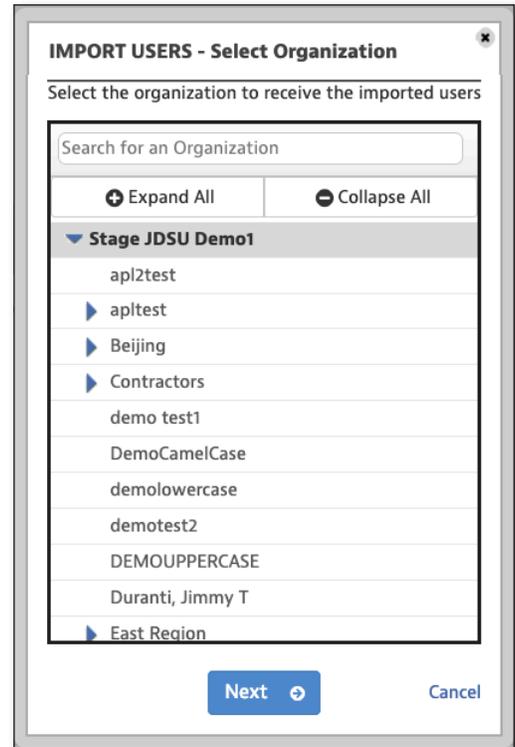
This section details how to import multiple users from a CSV file.

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

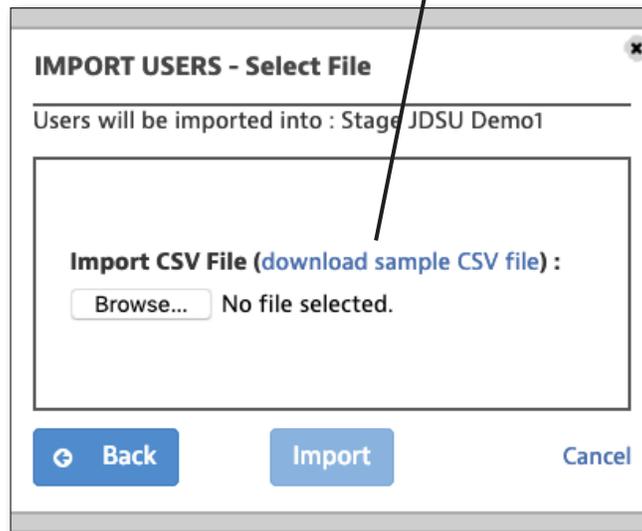
Make sure you retain the header row and enter the data fields starting on row 2. See the sample file for more information.

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

The users will be imported into the People List.



**Download sample CSV**



## Importing Changes for Users

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

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

## Managing User Roles

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

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

### Adding Roles

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

*Create a new role*

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

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

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

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

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

When done, click **Done**.

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

**CREATE USER ROLE**

\* Role name:  Landing Site: Administra...

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

**Permissions available:**

- + Firmware Management
- + License Management
- + Miscellaneous Permissions
- + Options Management
- + Organization Management
  - Add Organizations
  - Delete Organizations
  - Edit Organizations
  - Import Organizations
  - Manage Organization Settings
  - Move Organizations
- + Report Management
- + System Settings
- + Test Data

**Permissions granted:**

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

**Done** Cancel

**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

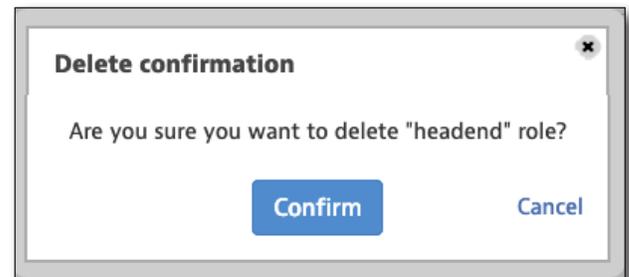
From the Manage User Roles screen, click **Edit** to update user roles.

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.***

## 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

### ***License Management***

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

### ***Miscellaneous Permissions***

- 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 Calibration Due Settings** – Configure calibration due times

**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 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 test data deletion

**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 deletion of users

**Edit Users** – Edit user details

**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)

**Work Order Management**

**View Work Orders** – Allow work orders to be viewed



# Organizations

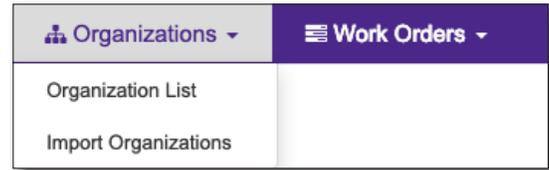
This chapter covers how to use the Organization Management features of StrataSync. Topics discussed include the following:

- "Organizations" on page 146
- "Searching and Sorting" on page 147
- "Organization List" on page 150
- "Importing Organizations" on page 157

# Organizations

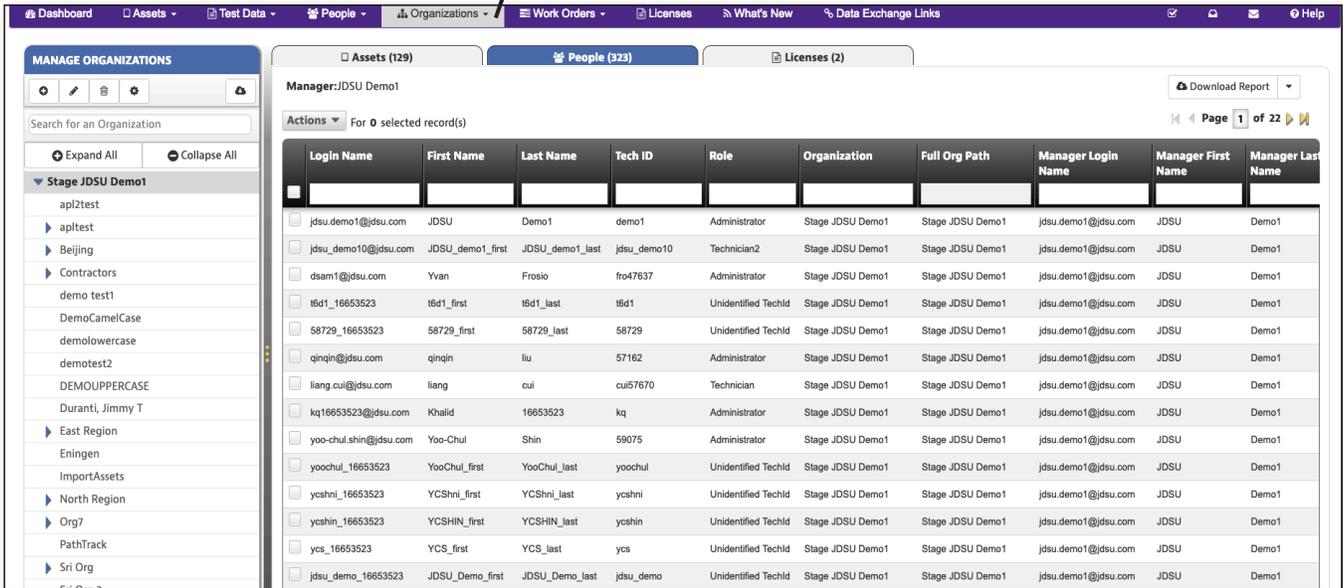
The **Organizations** tab is the hub for all of the organization and suborganization management features of your StrataSync account, including: adding, editing, moving, deleting, and importing organizations.

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



**Organizations dropdown menu**

**Organizations tab**



**Organizations List selected from the Organizations tab**

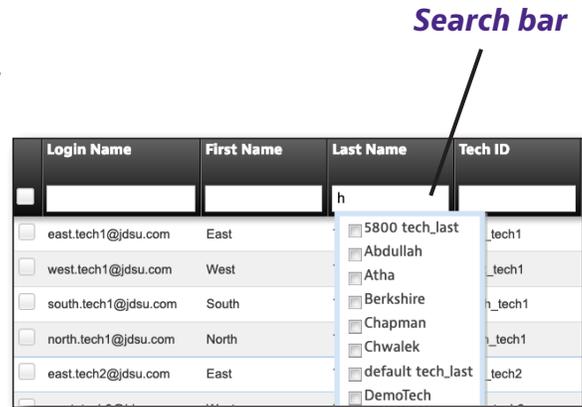
## Searching and Sorting

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

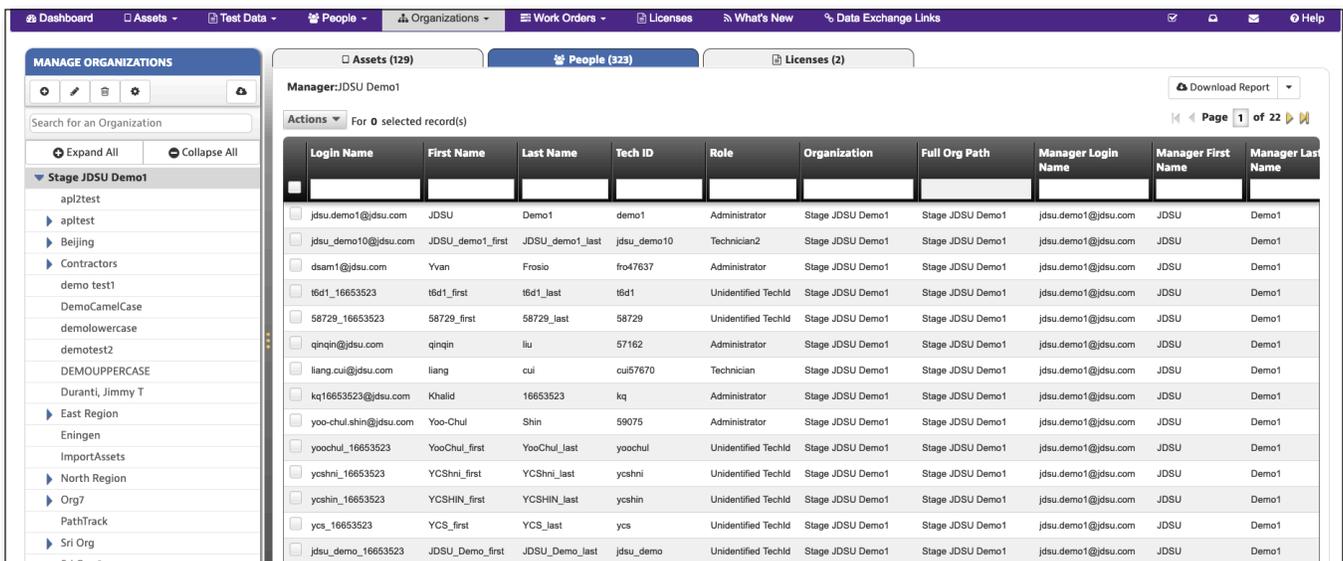
### Searching

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

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



Although the Organization List doesn't have Views like other lists, the filters work similarly. To remove the filter from the search bar, click the (x) to remove the filter.



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

### Filtering Multiple Items

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

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

Role	Organization
Firmware Test	

**ROLE FILTER** ✕

[Clear selected items](#)

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

**Apply**



#### NOTE:

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

### Date Filters

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

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

None	Login Enabled	Last Login Date

**SELECT A DATE RANGE** ✕

Exact dates

Start: 1/4/19 📅

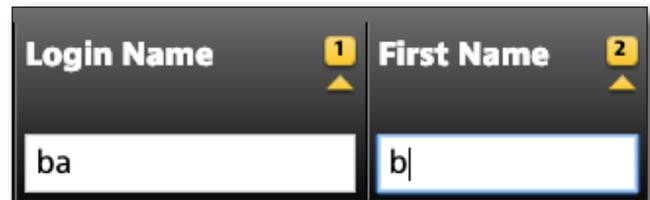
End: 4/25/19 📅

**Apply**

## 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.

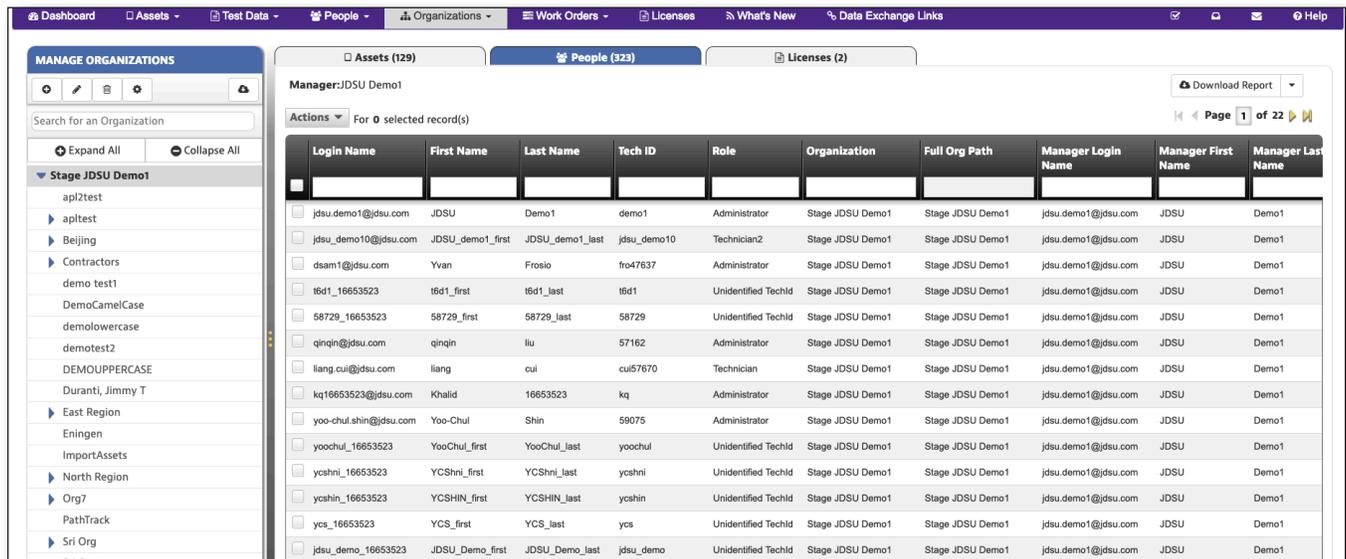


# Organization List

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

## Manage Organizations Tab

### Adding Organizations

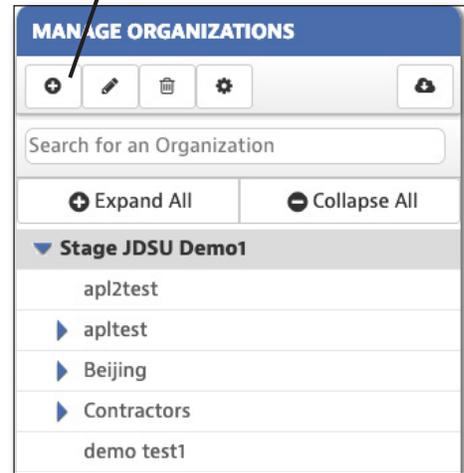
From the Organization List screen, select the **Add** button at the top of the **Manage Organizations** tab. The Add Organization screen is displayed.

On the right, select the parent organization.

Enter the name for the new organization and the manager account name for this org. The name must already be in the system at this point. When done, click **Save and Done**.

The new organization will appear in the list.

### Add Organization



#### Add Organization

**\* Organization Name:**

**\* Manager Tech ID:** [Add User](#)

**\* Manager First Name:**

**\* Manager Last Name:**

**Set maximum time for options checkout:**  **days**

**Parent Organization:** Stage JDSU Demo1

Search for an Organization

▼ Stage JDSU Demo1

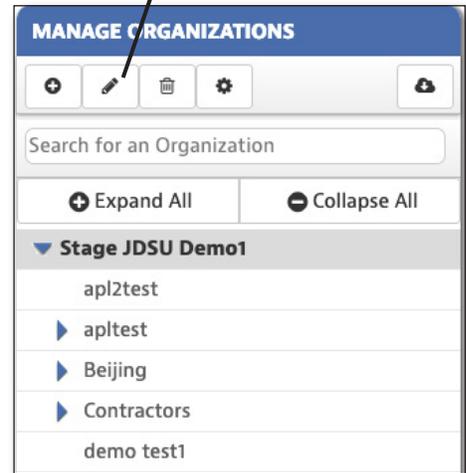
- apl2test
- ▶ apltest
- ▶ Beijing
- ▶ Contractors
- demo test1
- DemoCamelCase
- demolowercase
- demotest2
- DEMOUPPERCASE

### Editing Organizations

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

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

### Edit Organization



#### Edit Organization

\* **Organization Name:**  
demo test1

\* **Manager Tech ID:**  
demo1

\* **Manager First Name:**  
JDSU

\* **Manager Last Name:**  
Demo1

**Set maximum time for options checkout:**  days

**Save** **Cancel**

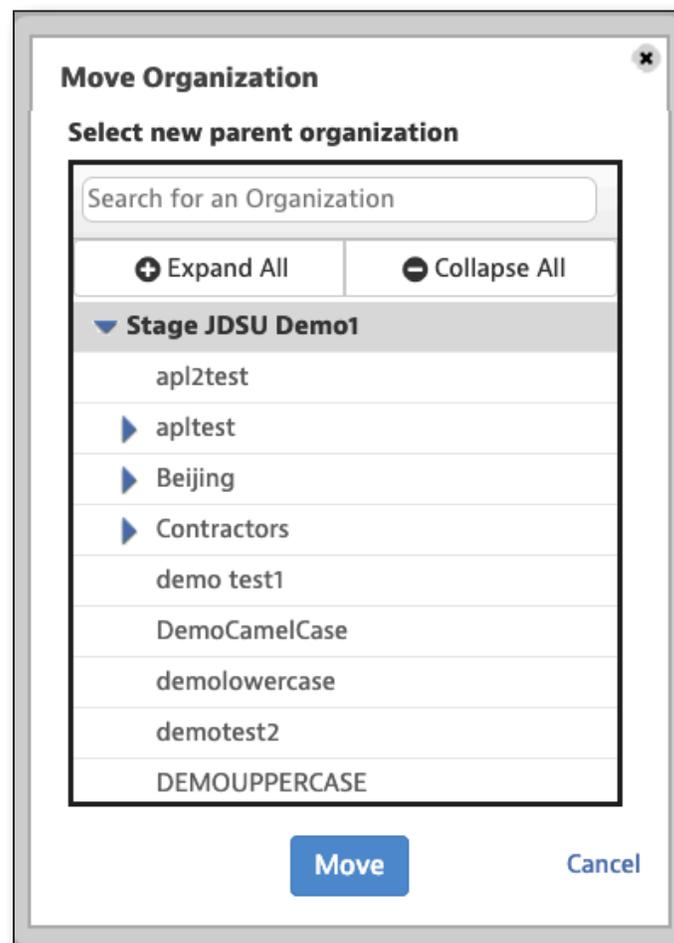
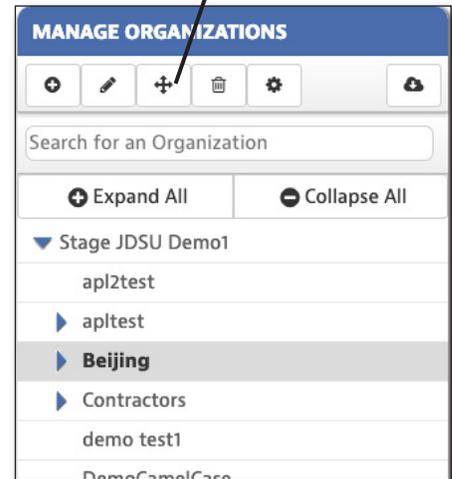
## Moving Organizations

With this feature, you can choose a new parent organization for your sub org.

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

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

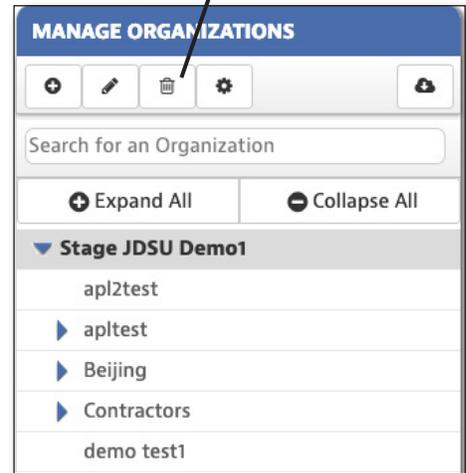
### Move Organization



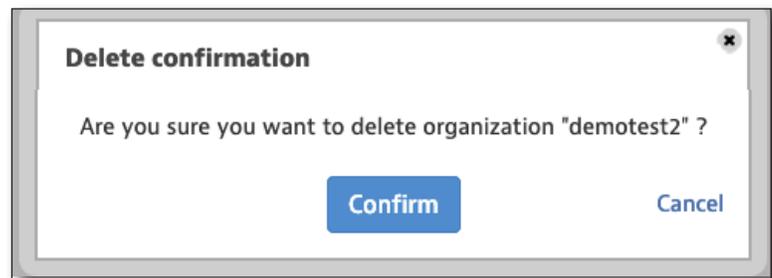
### Deleting Organizations

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

*Delete Organization*



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



**NOTE:**



***Before deleting an organization, all associated sub organizations, users, assets, and templates must be deleted or moved to other organizations.***

## Organization Settings

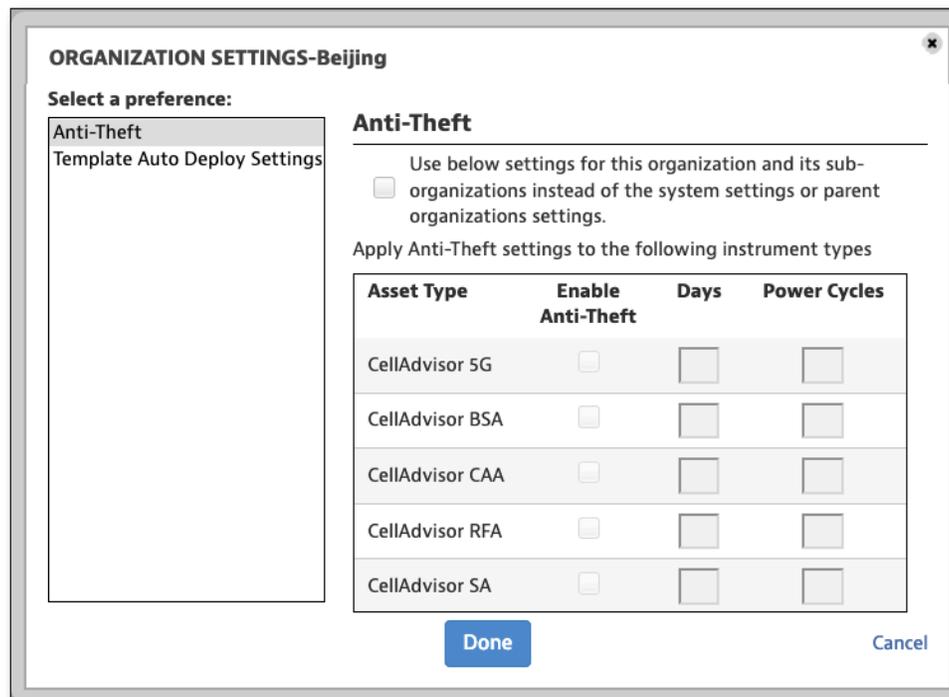
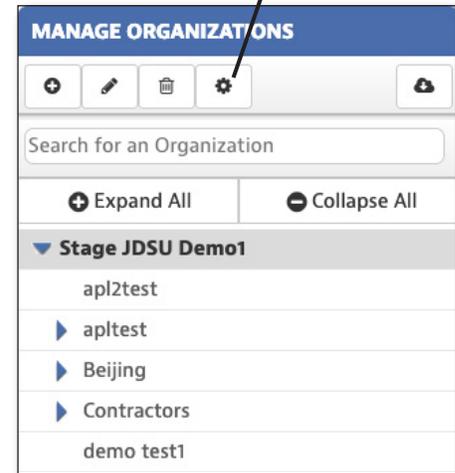
This feature allows you to customize your anti-theft and template auto deploy settings.

This allows you to tailor these settings by asset type instead of using the system settings or parent organization settings.

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

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

**Organization Settings**

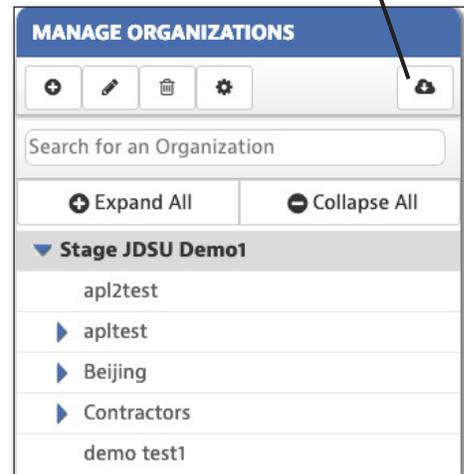


### Downloading Organization Data

From the Organization List screen, select the organization or suborg you want to download data for under the **Manage Organizations** tab, then select the **Download Organization List** button at the top.

Choose where you want to save the file.

*Download Organization List*



### Assets Tab

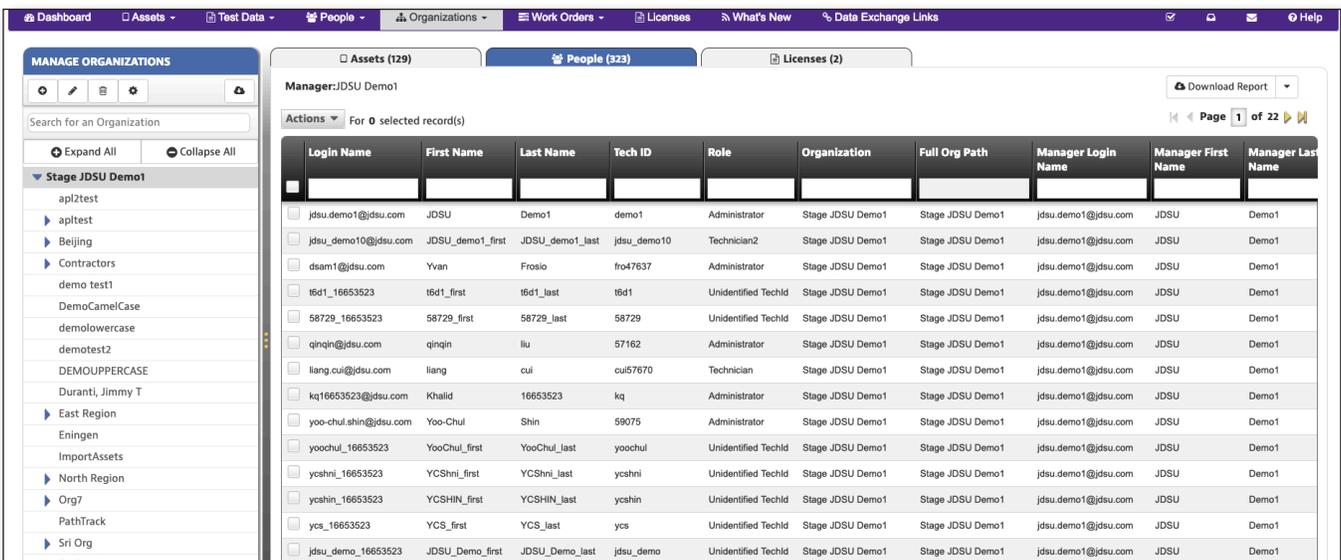
Using the **Assets** tab from the Organization List is similar to details covered previously. See: [Assets on page 55](#).

### People Tab

Using the **People** tab from the Organization List is similar to details covered previously. See [People on page 119](#).

### Licenses Tab

Using the **Licenses** tab from the Organization List is similar to details covered later in this guide. See [Licenses on page 169](#).



Organization List, with the People tab selected

## Importing Organizations

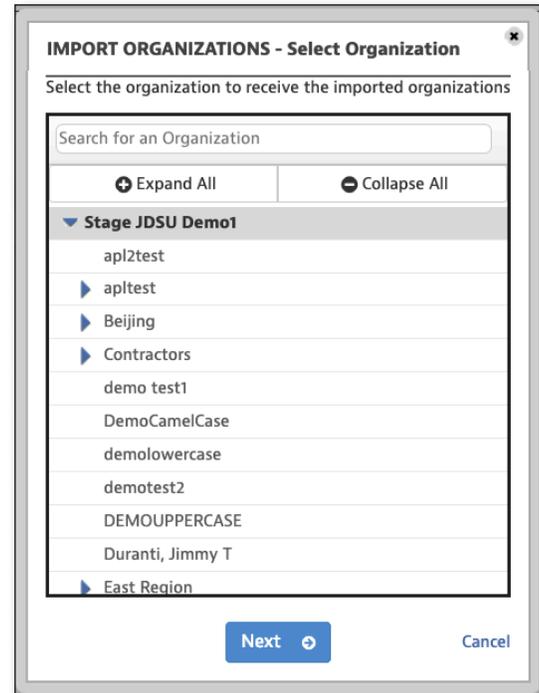
This section details how to import organization hierarchy from a CSV file.

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

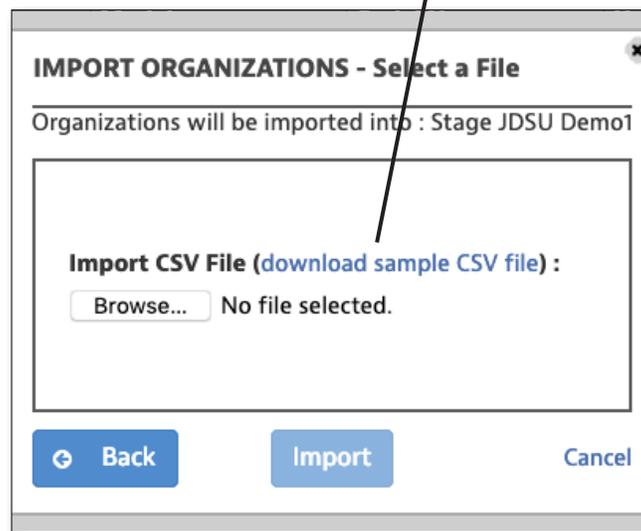
Make sure you retain the header row and enter the data fields starting on row 2. See the sample file for more information.

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

The organization will be imported into the hierarchy.



### Download sample CSV



## Importing Changes for Organizations

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

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

## Work Orders

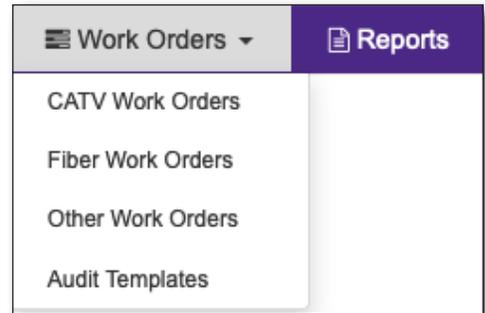
This chapter covers how to use the Work Order Management features of StrataSync. Topics discussed include the following:

- "Work Orders" on page 160
- "Searching and Sorting" on page 161
- "Views" on page 164
- "CATV, Fiber, and CDM Work Orders" on page 167

## Work Orders

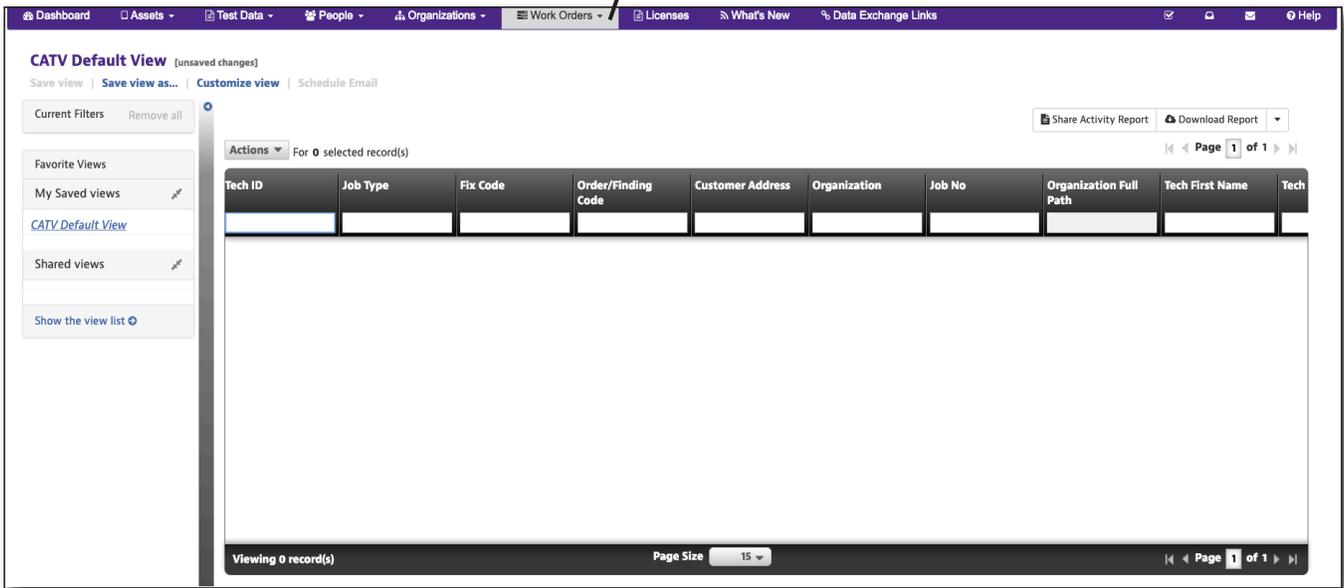
The **Work Orders** tab is the hub for all of the work orders management features of your StrataSync account for your field instruments, including: CATV, Fiber, Other work orders, and Audit templates.

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



**Work Orders dropdown menu**

**Work Orders tab**



**Work Orders List selected from the Work Orders tab**

## Searching and Sorting

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

### Searching

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

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

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

*Search bar*

Asset class	Asset Type	Model	Unique
<input type="checkbox"/>		T-BERD	
<input type="checkbox"/>	Syncable	CellAdvisor CAA	DDE315
<input type="checkbox"/>	Syncable	T-BERD/MTS 2000	T-BERD
<input type="checkbox"/>	Syncable	CellAdvisor CAA	DDE315
<input type="checkbox"/>	Syncable	T-BERD/MTS 8000	T-BERD
<input type="checkbox"/>	Module	T-BERD/MTS module	20PMVFL

T-BERD

- T-BERD 2000
- T-BERD 4000
- T-BERD 5800 V2
- T-BERD 6000A
- T-BERD 6000A V2
- T-BERD 8000E

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

Current Filters	Remove all
<input checked="" type="checkbox"/> Model T-BERD	
Favorite Views	
My Saved views	
<a href="#">Default View</a>	

Tech ID	Job Type	Fix Code	Order/Finding Code	Customer Address	Organization	Job No	Organization Full Path	Tech First Name	Tech
Viewing 0 record(s)									

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

### Filtering Multiple Items

The Status and Pass/Fail Status columns allow you to select multiple items to filter at the same time (e.g. filter Closed and Rescheduled status only). When ready, select **Apply**.

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

The screenshot shows a filter dialog for the 'Status' column. The dialog title is 'STATUS FILTER'. It has a close button (x) in the top right corner. Below the title, there is a link that says 'Clear selected items'. A list of status options is shown with checkboxes: 'Closed' (checked), 'Rescheduled' (checked), 'Cancelled', 'Completed', and 'Open'. At the bottom of the dialog is a blue 'Apply' button.

#### NOTE:



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

### Date Filters

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

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

The screenshot shows a filter dialog for the 'Scheduled Date' column. The dialog title is 'SELECT A DATE RANGE'. It has a close button (x) in the top right corner. Below the title, there is a dropdown menu set to 'Exact dates'. Below the dropdown are two input fields: 'Start: 1/24/19' and 'End: 4/25/19', each with a calendar icon to its right. At the bottom of the dialog is a blue 'Apply' button.

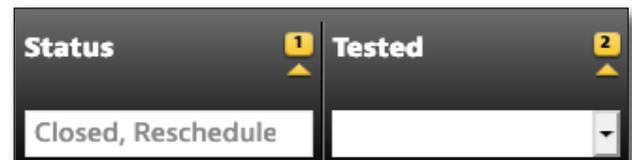
**NOTE:**

**You can save custom filters to a favorite view for easy reference. See [Saving Views on page 165](#).**

## 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.

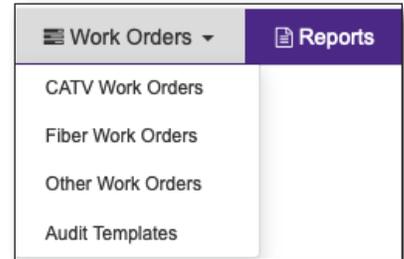


# Views

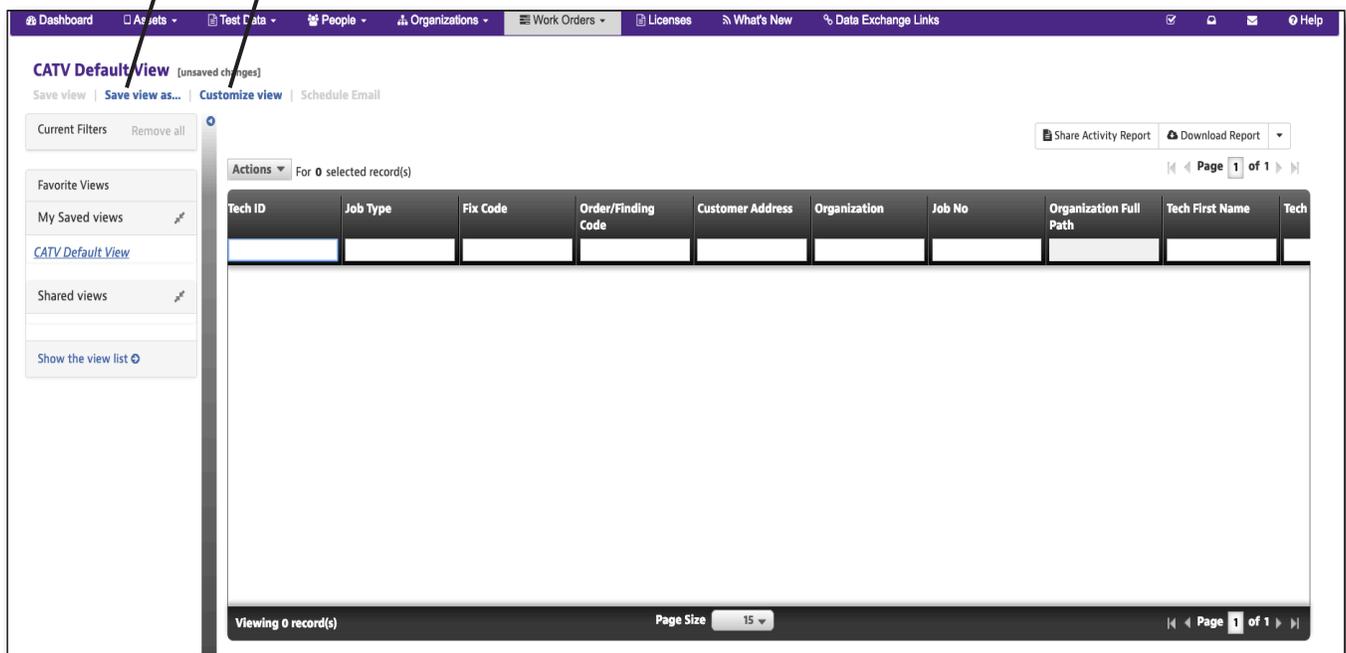
## Customizing Views

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. The Customize View screens appears.

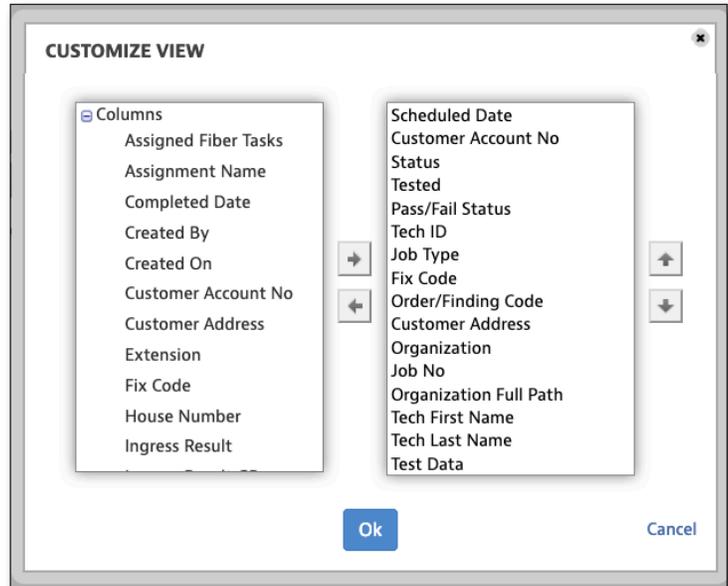


**Save View As**     **Customize View**



**Work Orders Default View**

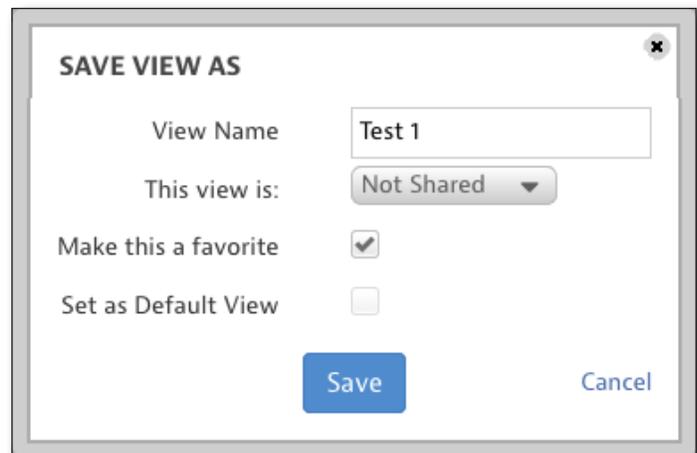
- In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
- Select an attribute, then use the arrow buttons to add or remove attributes to adjust the view list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



## Saving Views

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

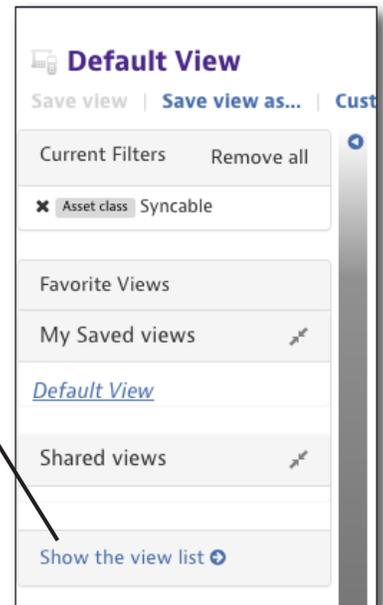
The new view is listed under the Favorite Views section on the left.



## Sharing and Editing Views

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

*Show the view list*



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

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

[Done](#)

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

## CATV, Fiber, Other Work Orders, and Audit Templates

These features are covered in detail in other documents. Contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com) for additional information.



## Licenses

This chapter covers how to use the License Management features of StrataSync. Topics discussed include the following:

- "Licenses" on page 170
- "Searching and Sorting" on page 172
- "Views" on page 175
- "Software Option Licensing" on page 178

# Licenses

The **Licenses** tab is the hub for all of the license management features of your StrataSync account, including all software options for your field instruments.

The Licenses menu also shows any optional StrataSync entitlements, including: test data API, data retention, workflow, and reporting, etc.

Click the **Licenses** tab in the Main menu to bring up the Licenses menu.

*Licenses tab*

License Type	Organization	Full Org Path	Expiration Date	Available Data	Total Data	Customer PO#
Plus	JDSU Main	JDSU Main	3/24/18	2,777.25 M	3,000 M	Retention_Per_Rick
API Access	JDSU Main	JDSU Main	9/18/18	2,548.005 M	3,000 M	RaviTest
API Access	GT Engineering	JDSU Main.GT Engineering	3/10/17	1,487.326 M	2,000 M	Steven Wendling
Plus	JDSU Main	JDSU Main	1/16/21	0 M	3,000 M	fy011618-2
Test Data Exchange	JDSU Main	JDSU Main	12/8/19	2,991.696 M	3,000 M	w1
Reports	JDSU Main	JDSU Main	8/5/20	3,000 M	3,000 M	int
Plus	StrataSync Operations	JDSU Main.StrataSync Operat...	11/11/21	3,000 M	3,000 M	test
API Access	JDSU Main	JDSU Main	11/15/22	9,981.986 M	10,000 M	internal use
Test Data Exchange	JDSU Main	JDSU Main	11/15/21	5,000 M	5,000 M	int2
Test Data Exchange	JDSU Main	JDSU Main	3/6/19	2,948.772 M	3,000 M	int
API Access	JDSU Main	JDSU Main	9/29/19	4,994.348 M	5,000 M	PO_20180929_5GB
Reports	JDSU Main	JDSU Main	11/15/21	3,000 M	3,000 M	INT3
Work Order Exchange	JDSU Main	JDSU Main	12/8/21	3,000 M	3,000 M	w1

**Licenses List**

## License Types

**Plus** – Extended data retention beyond the standard 35 days (typically 1–3 years depending on account licensing).

**API Access** – A programmatic interface available to search for any test results files uploaded to StrataSync, and transfer them to another software system.

**Reports** – A programmatic or scheduled flat-file interface available to push work orders into StrataSync, for the purpose of automatically deploying to test instruments based on the work order's associated technician identifier.

Depending on the type of interface, on-demand workorder compliance reports may be available under the **Reports** tab to evaluating compliance of test results uploaded and associated to workorders.

**Test Data Exchange** – Allows an admin user of a StrataSync account to select test data/results files and share them with another StrataSync account based on a secure pre-established data exchange link (configured under the **Data Exchange Links** tab in the Main menu).

**Work Order Exchange** – Currently supported for CATV work orders only. Allows an admin user of a StrataSync account to select a CATV work order pushed via a work order integration interface (requires the Reports license), and share it with another StrataSync account based on a secure pre-established data exchange link (configured under the **Data Exchange Links** tab in the Main menu).

Once the assigned technician in the receiving account has uploaded test results associated with that work order, an admin user in that account can share those results back to the originating account via Test Data Exchange.

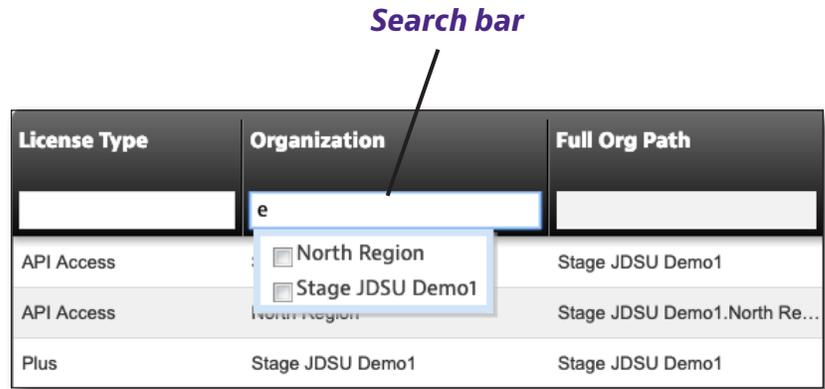
# Searching and Sorting

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

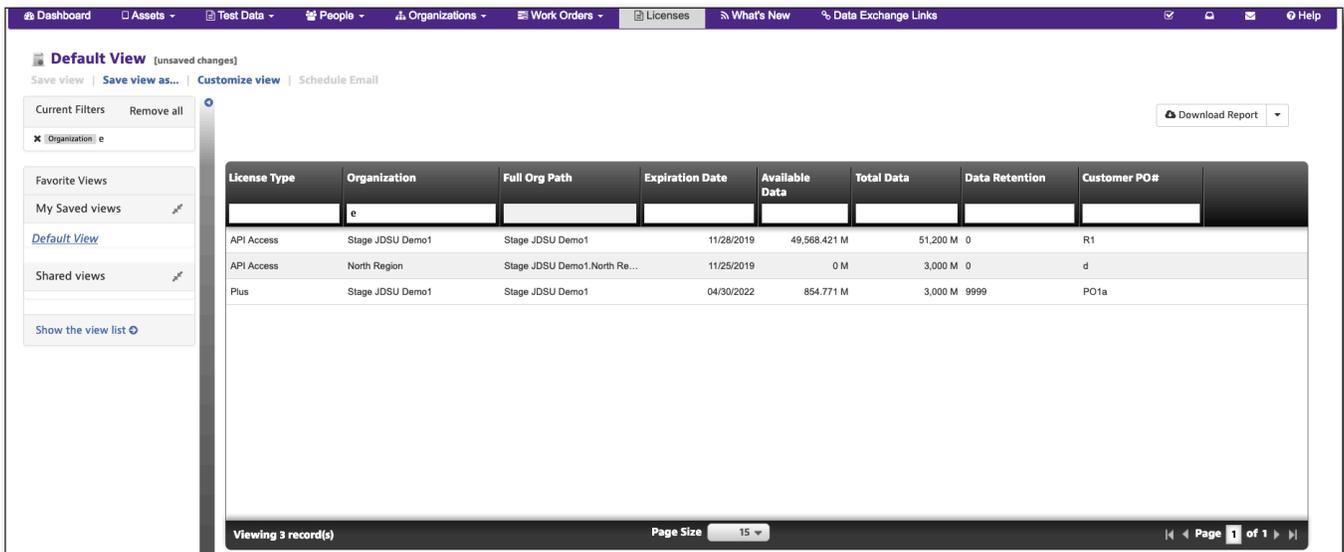
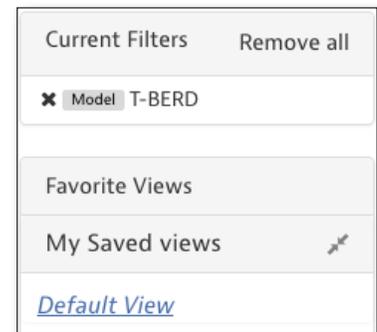
## Searching

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

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



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.

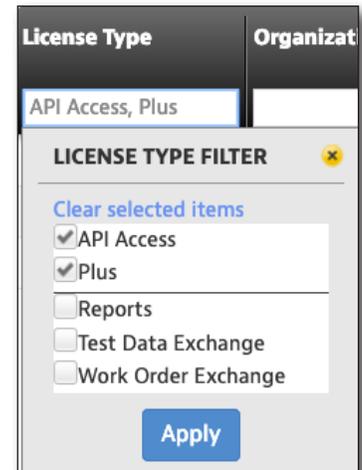


## Licenses List

### 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:

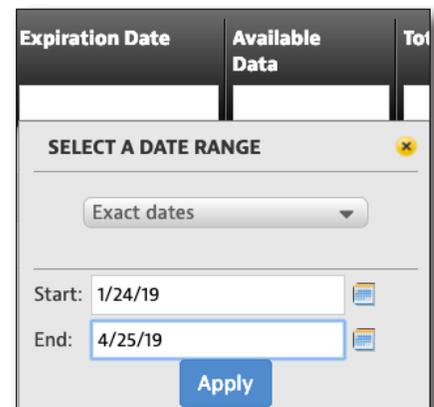


**Remember when using filters to make sure the columns that you don't want included are blank, so the search results are not affected by them.**

### 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 176](#).**

## 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.

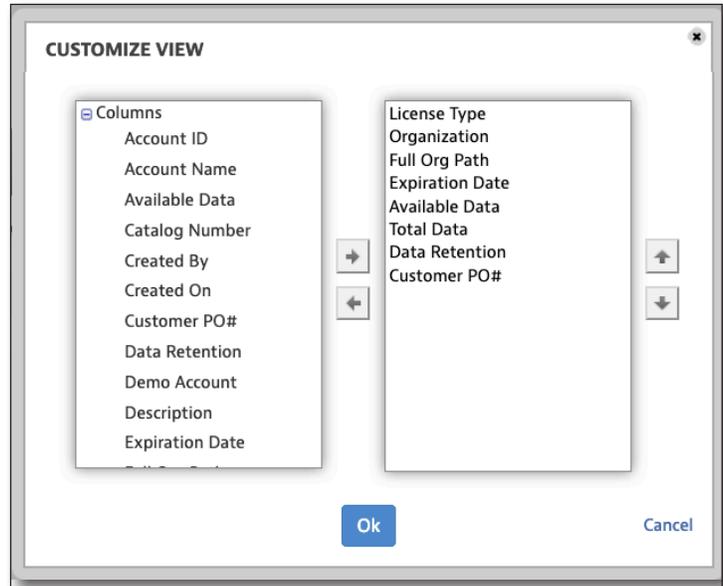
**Save View As**      **Customize View**

License Type	Organization	Full Org Path	Expiration Date	Available Data	Total Data	Data Retention	Customer PO#
API Access	Stage JDSU Demo1	Stage JDSU Demo1	11/28/2019	49,568.421 M	51,200 M	0	R1
API Access	North Region	Stage JDSU Demo1.North Re...	11/25/2019	0 M	3,000 M	0	d
Plus	Stage JDSU Demo1	Stage JDSU Demo1	04/30/2022	854.771 M	3,000 M	9999	PO1a

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

**Licenses Default View**

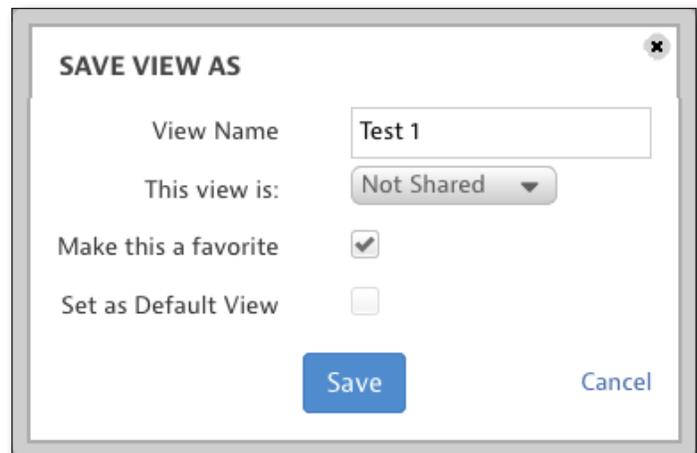
1. The Customize View screens appears.
2. In the left column, you will see the asset types. Click the plus (+) to expand the attributes associated to the asset type. The right column shows the attributes already included in the view list.
3. Select an attribute, then use the arrow buttons to add or remove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



## Saving Views

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

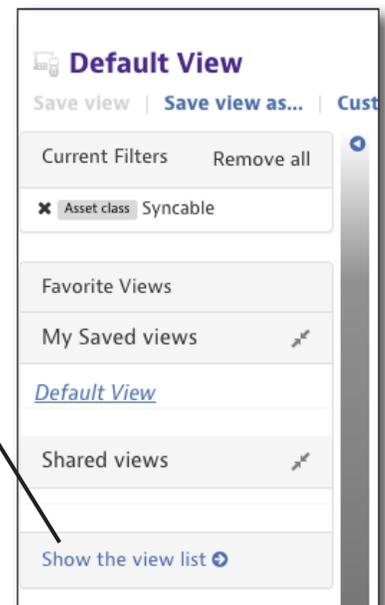
The new view is listed under the Favorite Views section on the left.



## Sharing and Editing Views

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

*Show the view list*



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

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

[Done](#)

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

## 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 55.

# Configuration

This chapter covers how to configure the StrataSync system. Topics discussed include the following:

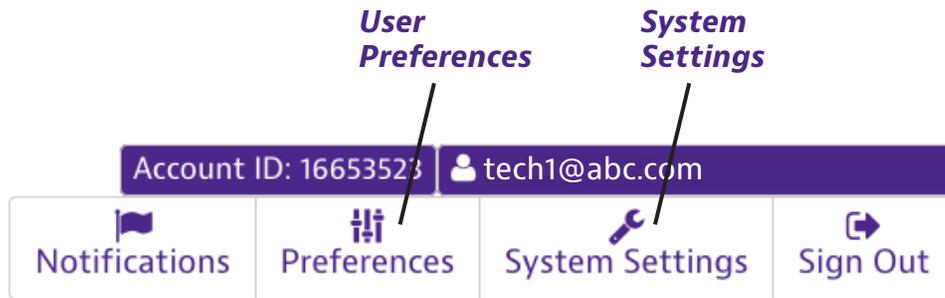
- "Configuration" on page 180
- "Preferences" on page 180
- "System Settings" on page 184

# Configuration

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

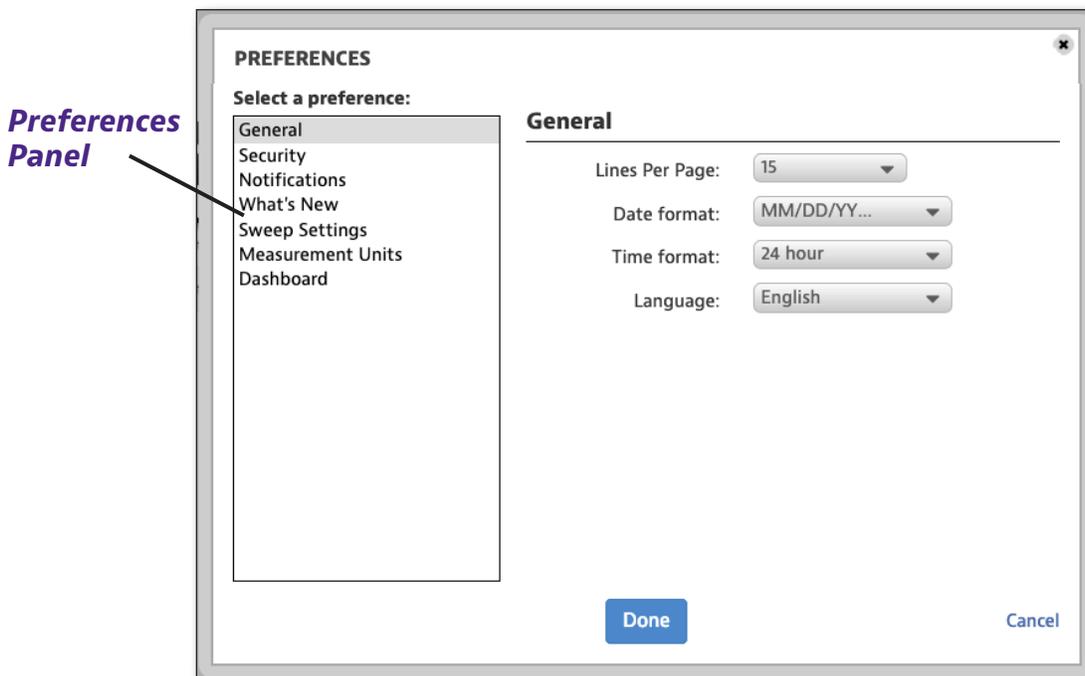
The **System Settings** feature allows StrataSync administrators to configure the overall system, including security, asset management, organization, firmware management, and configuration template settings.

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.



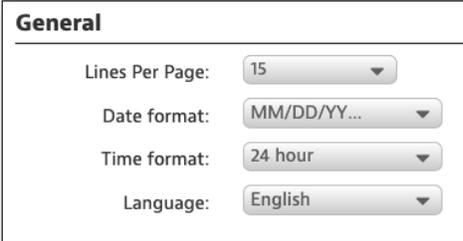
User Preferences, with General selected

## 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**.



**General**

Lines Per Page: 15

Date format: MM/DD/YY...

Time format: 24 hour

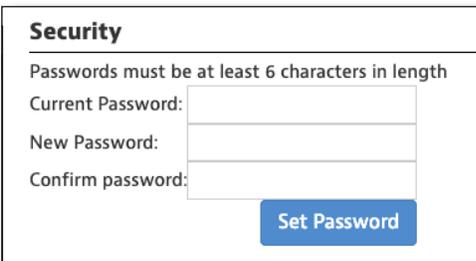
Language: English

## Security

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

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

When finished, click **Done**.



**Security**

Passwords must be at least 6 characters in length

Current Password:

New Password:

Confirm password:

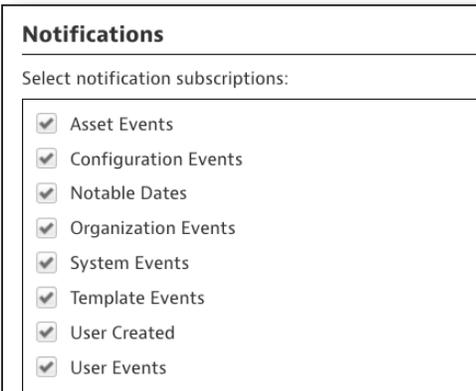
Set Password

## Notifications

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

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

When finished, click **Done**.



**Notifications**

Select notification subscriptions:

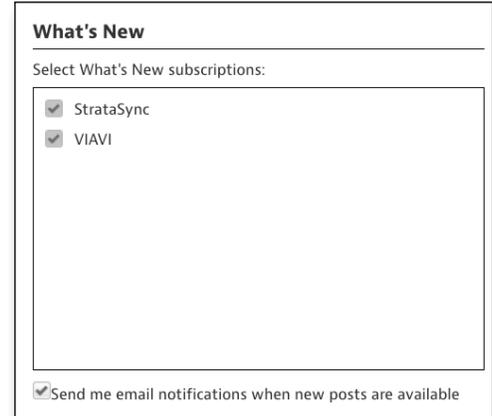
- Asset Events
- Configuration Events
- Notable Dates
- Organization Events
- System Events
- Template Events
- User Created
- User Events

## What's New

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

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

When finished, click **Done**.



## Sweep Settings (DSAM only)

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

This feature allows you configure how DSAM and SDA 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 DSAM and SDA measurement files and DSAM configuration editors are shown in StrataSync. This overrides the overall System Settings set by your StrataSync administrator.

When finished, click **Done**.

The screenshot shows a window titled "Measurement Units" with a subtitle "Configure measurement units:". It contains four rows of configuration options, each with a label and a dropdown menu:

- Signal Level Units: dBmV
- Signal Quality Units: MER
- Hum Units: %
- Distance Units: Feet

## Dashboard

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

This feature allows you to choose what summary panels appear on the Main Dashboard. Use the dropdowns to choose from among 13 available panels.

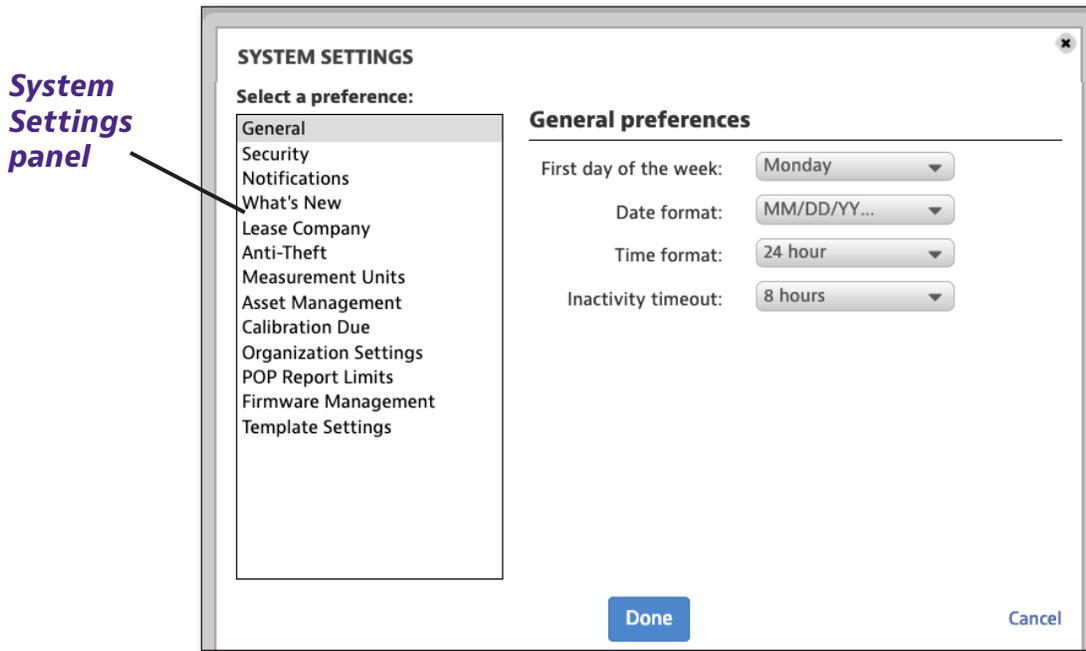
When finished, click **Done**.

The screenshot shows a window titled "Dashboard" with a subtitle "Customize summary panels on Dashboard:". It contains six rows of configuration options, each with a label and a dropdown menu:

- Summary Panel 1: Assets Class
- Summary Panel 2: Test Data U...
- Summary Panel 3: People Role
- Summary Panel 4: Sync Status
- Summary Panel 5: Test Data T...
- Summary Panel 6: Organizati...

## System Settings

On the left side of the screen is the **System Settings panel**, with several categories of system-wide settings. Select one to show the options on the right.



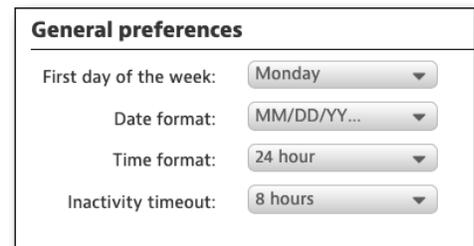
System Settings, with General selected

### General

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

This feature allows you to set the first day of the week, date and time formats, and inactivity timeout when user's need to log back in.

When finished, click **Done**.



#### NOTE:



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

## Security

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

This feature allows you to set up password strength requirements.

When finished, click **Done**.

### Security Preferences

- Minimum password length (6 - 10)
- Require both upper and lower case
- Require at least one number
- Require at least one special character !#\$%&\_+=<>

#### Recommended best practice:

A minimum password length of at least 8 characters, enabling 'Require both upper and lower case', and enabling 'Require at least one number' are recommended.

## Notifications

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

This feature allows you choose what system-wide event notifications are available and for how long.

When finished, click **Done**.

### Notifications

Notification Life:  days

Select events to make available:

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

## What's New

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

This feature allows you choose what system-wide application events and announcements are available.

When finished, click **Done**.

### What's New

Select What's New subscriptions:

- Capacity Advisor
- CellAdvisor BSA
- CellAdvisor CAA
- CellAdvisor RFA
- CellAdvisor SA
- DSAM
- FiberChek
- HST-3000
- OneExpert CATV

## Lease Company

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

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

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

Enter the lease company information, then click **Save**. The company will be added to the list.

To edit or delete a company, select **Edit** or **Delete**.

When finished, click **Done**.

Lease Company		
Name	Leases	Actions
Enterprise Le...	1	<a href="#">Edit</a>   <a href="#">Delete</a>
JDSU	10	<a href="#">Edit</a>   <a href="#">Delete</a>

**LEASE COMPANY - Create**

\* Business Name:

Contact:

Telephone:

email:

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

## Anti-Theft

Select **Anti-Theft** to bring up the Anti-Theft section.

This feature allows you to manage anti-theft measures for your instruments and whether they can sync data to StrataSync.

When finished, click **Done**.

Anti-Theft			
Apply Anti-Theft settings to the following instrument types			
Asset Type	Enable Anti-Theft	Days	Power Cycles
CellAdvisor 5G	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CellAdvisor BSA	<input type="checkbox"/>	1	2
CellAdvisor CAA	<input type="checkbox"/>	1	2
CellAdvisor RFA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
CellAdvisor SA	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
DSAM	<input type="checkbox"/>	7	3

## Measurement Units

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

This feature allows you to choose how DSAM and SDA measurement files and DSAM 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.

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**.

## Calibration Due

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

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

When finished, click **Done**.

**Calibration Due**

Configure Calibration Due times:

AssetType	Calibration Due (months)	
124	12	Default
135	12	Default
AVX-10K	12	Default
BERT 40G/100G TM6	12	Default
BERT CSAM1	12	Default
BERT MSAM1	12	Default

## Organization Settings

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

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

When finished, click **Done**.

**Organization Settings**

Enable organization settings override system settings

## POP Report Limits (DSAM only)

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

This feature allows you to configure POP report limits.

When finished, click **Done**.

POP Report Limits	
Configure POP Report Limits: <span>Restore To Default</span>	
24 Hour Deviation(dB):	+8.0
Maximum Adjacent Channel(dB):	+3.0
Maximum Analog Delta Video(dB):	+10.0
Analog Delta Video Offset(dB):	+1.0
Maximum Digital Delta Video(dB):	+10.0
Digital Delta Video Offset(dB):	+1.0
Minimum Video Level(dBmV):	+3.0
Minimum Digital	

## Firmware Management

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

This feature allows you to manage firmware versions for your assets, including an option to only show approved firmware.

Select **Manage Firmware Versions** and choose an asset to see available firmware.

When finished, click **Done**.

**Firmware Management**

Show only approved firmware versions in Upgrade Firmware functionality

[Manage Firmware Versions](#)

## 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 the v8.2 StrataSync Release Notes or contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com).

**Template Settings**

Enable Template Auto Deploy

Enable Configuration Artifact Link from Global Archive or Templates



## Appendix

This appendix includes supplemental information for StrataSync. Topics discussed include the following:

- "Additional Information" on page 192

## Additional Information

For more detailed information, contact us at [CATVsupport@viavisolutions.com](mailto:CATVsupport@viavisolutions.com) for these additional documents.

**StrataSync Quick Start Guide**

**StrataSync Software Release notes** (including system requirements)





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**English**

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