

# Sievers DataShare Elite\* User Guide





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# **CHAPTER 1: INTRODUCTION**

This guide explains how to use Sievers DataShare Elite, which facilitates electronic record management, review, and approval from multiple Sievers Analyzers across the enterprise. DataShare Elite consolidates data in a common format across instrument platforms, allowing multiple users and sites to safely and securely access information and evaluate records while maintaining data integrity.

This guide also includes instructions for using the optional DataGuard security feature to support 21 CFR Part 11 compliance as it relates to electronic record management and application of electronic signatures. For more information on this feature, see <u>Chapter 3</u>, "DataGuard."

# DATASHARE ELITE USER INTERFACE

The starting point for all DataShare Elite activities is the Menu Bar, which appears on the left side of every DataShare Elite screen. Figure 1-1 shows the Menu Bar in its collapsed (left) and expanded (right) views. Click the **Menu** icon **≡** to switch between views.



Figure 1-1: DataShare Elite Menu Bar

## Summary of DataShare Elite Functions

<u>Table 1-1</u> lists the names of the five icons on the pop-out menu bar and describes their functions.

lcon	Name	Description		
:=	Menu	Click this icon to open the menu bar when it is closed and to close it when it is open.		
ممہ	Data History	Sample Results Screen		
	(For more details, go to	View, filter, graph, print, and export sample results data, create reports from data.		
	<u>page 96</u> .)	Protocol Results Screen		
		View, filter, graph, print, and export protocol results data, create reports from data.		
		<ul> <li>User Protocols tab: Work with data about user protocol results.</li> <li>Calibrations tab: Work with data about calibration protocol results.</li> <li>Verifications tab: Work with data about verification protocol results.</li> <li>Validations tab: Work with data about validation protocol results.</li> </ul>		
		Import Dialog Box		
		Import data from files generated by Analyzers.		
		View Archive Dialog Box		
		Open an archive data file previously created in DataShare Elite.		
Close		Close Archive Dialog Box		
		Close an archive data file to return to viewing the active DataShare Elite database.		

#### Table 1-1: Names and Descriptions of Menu Bar Icons

lcon	Name	Description
بک	Management	Analyzers Screen
	(For more details, go to <u>page 142</u> .)	Set up Access Levels, which control access to Analyzer data by location, site, and region. After Access Levels are created, they are assigned to user accounts.
		Analyzers tab: Assign Analyzers to locations.
		Locations tab: Create locations and assign them to sites.
		• <i>Sites</i> tab: Create sites and assign them to regions.
		<i>Regions</i> tab: Create regions.
		Settings Screen
		Configure DataShare Elite settings.
		<ul> <li>General tab: Specify language, data and time format, time zone for imported data, report header information, signature block and orientation for printed reports, and default graph data.</li> </ul>
		<ul> <li>Displayed Data tab: Specify headings and data that appear in the DataShare Elite application, on printed reports, and in exported files.</li> </ul>
		<ul> <li>Reports / Exports tab: Specify which output file types are enabled for saving reports and exporting data, names of exported files, and the default folders in which output files are placed.</li> </ul>
		Auto ImportsScreen
		Create direct connections to applicable instrument types and configure the auto import frequency from those compatible data sources.
		Remote Data Sources Screen
		Define and edit direct connections to applicable instrument types by IP address, manually import data, and test connections before establishing auto-import functionality.
		Database Screen
		Back up and restore the DataShare Elite database, archive older data by removing it from the database and saving it to a computer or network, and configure DataShare Elite to automatically back up and archive the database.
		Errors Screen
		View, filter, print, and export data about errors.
		<ul> <li>Analyzers tab: Work with data about Analyzer errors.</li> <li>DataShare Elite tab: Work with data about DataShare Elite errors.</li> </ul>
		Activations Screen
		Select the Activation Code provided by Veolia for your specific Analyzers and Sensors. Once activated, DataShare Elite can import data files generated by the Analyzers or Sensors up to the number of licenses available and defined by the expiration date of the activation key.

#### Table 1-1: Names and Descriptions of Menu Bar Icons

lcon	Name	Description	
6	DataGuard (if enabled)	Users Screen Create and manage user accounts.	
	(For more details, go to <u>page 50</u> .)	<ul> <li>User Roles Screen</li> <li>Create and manage User Roles (sets of permissions to perform specific DataShare Elite functions). After User Roles are created, they are assigned to user accounts.</li> <li>Security Settings Screen</li> <li>Configure DataGuard security settings.</li> <li>Audit Trail Screen</li> <li>Review, filter, print, export, and create reports from audit trail data.</li> <li>Analyzers tab: Audit trail data imported from files for specific Analyzers.</li> <li>DataPro2 tab: Audit trail data imported from DataPro2 files.</li> <li>DataShare Elite tab: Audit trail data for actions performed by DataShare Elite users.</li> </ul>	
i	Help (For more details, go to <u>page 186</u> for the <i>About</i> screen and <u>page 95</u> for the <i>Refresh All</i> <i>Data</i> option.)	About ScreenDisplay software version and support contact information, as well as a key number to provide to Technical Support for a password of the day if a user forgets a password.Refresh All Data Option Query the DataShare Elite database and update the DataShare Elite application with any data added to the database after the application was started or a previous query was made.	
Ċ	Exit	Exit DataShare Elite	

#### Table 1-1: Names and Descriptions of Menu Bar Icons

### DataShare Elite User Views

Which screens, menu options, and features the user sees depends on the installation type and the restrictions applied by the optional DataGuard security component. This User Guide documents the full set of DataShare Elite features, and the illustrations might differ from the user's actual view. Some of these differences are described in the sections that follow.

#### Tabs on Select DataShare Elite Screens

Some of the screens in the DataShare Elite application have a set of tabs that change based on activity:

- The Protocol Results screen (in the Data History menu)
- The *Analyzers* screen, *Settings* screen and the *Errors* screen (in the *Management* menu)
- If DataGuard is enabled, the *Audit Trail* screen (in the *DataGuard* menu)

### DataGuard User Roles and User Views

When DataGuard is enabled, users are assigned specific roles. These roles can include access to all DataShare Elite functions or restrict access as needed. When a user does not have access to a function:

- A screen might not appear on a DataShare Elite menu. For example, if a user does not have permission to work with data about errors, no *Errors* option appears on the *Management* from menu.
- A screen might appear, but some or all of the options might be inactive. For example, if a user does not have permission to change any of the settings on the *Reports / Exports* tab of the *Settings* screen, all the settings on that screen are inactive.
- A DataShare Elite screen might appear, but one or more buttons on the screen might not appear. For example, if a user has permission to view sample results but not to print or export them, no *Print* or *Export* buttons appear on the *Sample Results* screen.

For more information about DataGuard see Chapter 3, "DataGuard."

# CHAPTER 2: SETTING UP DATASHARE ELITE

This chapter provides some basic information about DataShare Elite setup, including computer system prerequisites, activation instructions, and configuration options. If you need additional assistance, contact Technical Support or your local service provider.

### **INSTALLATION PREREQUISITES**

### **Required Software**

#### Microsoft SQL Server 2022

DataShare Elite requires that you install Microsoft SQL Server 2022 to store and retrieve data generated by your Analyzer. Which edition of SQL Server 2022 is required (Express or Enterprise/Standard) depends on whether the data will be stored locally or remotely. SQL Server Express, which is limited to 10 GB of data, is required for local storage. SQL Server Enterprise/Standard is used to create a database instance remotely. Consult your IT professional or IT help desk and refer to *DataShare Elite Installation Guide* (DIN 59000-XX) if assistance is needed with SQL Server installation.



**NOTE:** If installing SQL Server Express, be sure to completely uninstall any previous versions of SQL Server. DataShare Elite requires SQL Server 2022.

#### Microsoft .NET Framework

SQL Server requires certain other libraries and packages from Microsoft for successful installation. Depending on the configuration of your system, you may need to install .NET Framework. Microsoft .NET Framework is a large library of common commands and program code that is shared among programs and applications. This has likely already been installed by other programs, but there will be a verification step during DSE installation in a later step.

#### DP900RST Utility (Sievers 900 TOC Analyzer users only)

If you have a Sievers 900 TOC Analyzer, you must first install the DP900 RST Utility Tool. For more information, see <u>Appendix A, "DP900RST Utility."</u>

### Minimum System Requirements

Before installing DataShare Elite, verify that the computer meets the minimum system requirements for the chosen installation configuration.

	Minimum Requirement	Recommended
Operating System	Windows 10 (64-bit) Windows Server 2019 and later	Windows 11 (64-bit)
Latest Release Version	21H1	21H2
RAM	4 GB	Increase as database grows for optimal performance
CPU Speed	1.4 GHz	2.0 GHz
Available Disk Space	SQL Server Express: 12 GB SQL Server Standard/Enterprise: 2GB (application) + sufficient storage for instrument data	
Screen Resolution	1024 x 768	1920 x 1080
Printer	Optional	

#### Table 2-1: System Requirements

### **INSTALLING DATASHARE ELITE**

The user performing the installation needs installation/administrator privileges on the destination computer and may need the assistance of a network administrator or IT group to perform network-related activities.

To perform the full installation procedure, follow the instructions found in *DataShare Elite Version 2.00 Installation Guide* (DIN 59000-XX), contained in the DataShare Elite installation ZIP file.

After completing installation, see the next section, <u>"Activating DataShare Elite" on page 15</u>.

# **ACTIVATING DATASHARE ELITE**

On the first launch of DataShare Elite, the Activations screen appears.



### To activate the DataShare Elite installation

- **1.** Navigate to the web link that Veolia provided and download the Activation Key file to a local drive on the computer.
- 2. Click the Activate... button. A Select Activation Key File window appears.

🕇 🖡	> This F	PC > Desktop		~	Ö	Search De	sktop	
Organize • Ne	w folder						• •	2
Desktop Downloads Documents Pictures Nusic Videos OneDrive This PC DDuberts	* * *	Name DSE_Activation_Key_202	10809_154456	Date modified 3/21/2024 10:49 AM		Type Text Document	Size	1 KB
Desktop	~							
	<b>C</b> :L					A still still a Marca		

3. Navigate to the location of the Activation Key file.

- **4.** Select the Activation Key file and click the **Open** button. A dialog box will appear that says Activation Successful. Click the **OK** button.
- 5. Navigate to the *Management* menu and select **Activations** to see the details of the active installation.



**NOTE:** To add more Analyzer types to the DataShare Elite installation, contact technical support or your local service provider to purchase an updated Activation Key.



**NOTE:** If the Expiration Date of the Activation has passed, the software will continue to connect to instruments and retrieve data, but will not be accessible to users until an updated, valid Activation Key is purchased. Contact technical support or your local service provider for assistance.

## **CONFIGURING DATASHARE ELITE SETTINGS**

After installing the DataShare Elite application, configure its settings. When DataGuard is enabled, more configuration options become available.

### **Configuring General Settings**

To configure general DataShare Elite settings, click the *Management* icon and select *Settings* on the *Management* menu. On the *General* tab, you can specify the language, the date and time format, the time zone for imported data, report header information, a signature-block on printed reports, the orientation of printed reports, and default graph data. If DataGuard is enabled, you also specify whether to fill signature lines and blank comment lines.

When DataGuard is enabled, depending on the user's permissions, either *Default Options*, *Custom Options* or both will be available.

In the General tab, *Custom Options* allow users with the appropriate permissions to:

- Customize Default Report Graphs
- Customize Display Formats (text format settings)
- Customize Print Options
- Customize Report Header
- Customize Time Zone for Imports

These settings do not affect other DSE users—only the currently logged in user.

*Default Options* apply to settings for all users who do not have their own *Customize...* permissions. To change default options under the General tab, a user needs the following permissions:

- Customize Default Report Graphs
- Set Default Display Formats
- Set Default Print Options
- Set Default Report Graphs
- Set Default Report Header
- Set Default Time Zone for Imports.

For more information about the two types of configuration options and how they apply to specific user roles, see <u>"DataGuard: Custom and Default Settings" on page 70</u>.

For a list of all DSE permissions and how they apply to user roles, see <u>"Managing User</u> Roles" on page 52.

A Management Settings Defult Options General Displayed D. Reports / Exports	b	с	d • • • •
✓       Text Format         Larguage       English (er, US)         Date       Text Format         L       Time         24 Hour (13:0)       ✓ Hour (13:0)         ✓ Show Seconds       Show UC         Decimal Separator       Language Default         Import Options       (UTC) Coordinated Universal Time	Report Header         Company Name         Company Logo         First Header Line         Second Header Line         Third Header Line         Operator Name	Print Options         Add Signature Block to Report         Orientation         Best Fit         Fit Bignature Lines         Fit Blank Comment Lines	Default Graph Data ✓ TC ✓ Iemp ✓ IC ✓ Iemp ✓ IC ✓ Icond

Figure 2-1: General Tab on Settings Screen

<b>a -</b> Text Format	<b>b</b> - Report Header	<b>c</b> - Print Options
<b>d -</b> Default Graph Data	e - Import Options	

### To configure the language

If DataGuard is enabled, your role must include the *Customize Display Formats* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the General tab.
- **3.** In the *Text Format* area (Figure 2-1, at **a**), select the preferred language for DataShare Elite screens, labels, and printouts from the *Language* list.

1	Text Format				
	Language				
	English (en-US)				
	English (en-US)				
	日本語 (ja-JP)				
	中文 (zh-Hans)				

4. Click the Save button.

•

### To configure the date and time format

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the General tab.
- **3.** In the *Text Format* area (Figure 2-1, at *a*), select one of the following formats in the *Date* list to display dates on DataShare Elite screens, exports, and printouts.
- Day first (25/08/21)
- Day first (25/08/2021)
- Year first (21/08/25)

• Year first (2021/08/25)

- (<u>\_\_</u>, <u>\_\_</u>, <u>\_\_</u>, <u>\_\_</u>, <u>\_\_</u>)
- Text (25 Aug 2020)
- Month first (08/25/2021)

Month first (08/25/21)

• Long Text (25 August 2020)

Mana Setting	<b>gement</b>	
Default Options	Custom Options	
General	Displayed Data	Reports / Exports
Text Form	nat	
English (e	n-US)	•
Date		
Text (25 A	ug 2024)	-
Time		
24 Hour (1	13:50)	-
Show Seconds		
Show I	JTC	
Decimal Se	parator	
Language	Default	-
		Defaults

- 4. In the *Time* list, select 24 Hour (13:50) or 12 Hour (01:50 PM).
- 5. To show seconds in the time values, put a check mark in the Show Seconds box.
- 6. To display time values in UTC (Coordinated Universal Time), put a check mark in the Show UTC box. For example, you import a data file with a record that has this timestamp: 10 Oct 2020 15:01:34. During the import, you select the Time Zone value (UTC-07:00) Mountain Time (US & Canada). DataShare Elite will display the timestamp of the record as 10 Oct 2020 15:01:34-07:00.

If the box is not checked, DataShare Elite will display time values without the UTC offset. For example, you import a data file with a record that has this timestamp: 10 Oct 2020 15:01:34. During the import, you select the Time Zone value (UTC-07:00) Mountain Time (US & Canada). DataShare Elite will display the timestamp of the record as 10 Oct 2020 15:01:34.

- 7. Choose a decimal separator type from the Decimal Separator list—either Language **Default** (based on the language chosen), **comma** (3,50) or **period** (3.50).
- 8. Click the **Save** button. If you do not want to save your changes to text format values, click the **Revert** button to restore the values prior to your changes.



**NOTE:** To restore the factory settings for text format values, click the **Defaults** button and then click the **Save** button.

## **Configuring Report Options**

This section contains these procedures:

- <u>"To configure the report header"</u>
- <u>"To configure print options" on page 22</u>
- <u>"To configure default graph data" on page 23</u>

#### To configure the report header

Use the *Report Header* fields to define the company name (and related information) and the operator's name to appear on the top of each exported or printed report.

If DataGuard is enabled, your role must include the *Customize Report Headers* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the General tab.
- **3.** In the *Report Header* area (Figure 2-1, at **b**), type the information to appear at the top of reports for each of the following:
  - Company Name
  - First Header Line\*
  - Second Header Line\*
  - Third Header Line\*
  - Operator Name



**NOTE:** Use these fields as needed for a company address line or other identifying information.

Report Header
Company Name
Company Logo
Q
First Header Line
Second Header Line
Third Header Line
Operator Name

**4.** To include a company logo (or other graphic) in the report header, click the *Search* **Q** icon. The *Select an image file containing the Company Logo* dialog box appears.

Select an image file cont	taining the Company Logo					×
$\leftarrow \rightarrow \checkmark \uparrow \downarrow $	This PC > Documents > Logo	~ Ū	Search Logo			م
Organize • New f	older			<b>*</b>		2
🔿 📥 OneDrive	^					
🗸 🍤 This PC						
> 📙 3D Objects						
Desktop						
Documents	Veolia logo					
🗧 📜 Downloads						
🕥 🚺 Music						
🔰 📜 Pictures						
🔋 🔚 Videos						
🔰 🥾 Local Disk (C:)						
and Marken and	~					
Fi	ile name:					~
			Open	c	ancel	

**5.** Navigate to the logo file on the computer. Select the file and click the **Open** button. The *Highlight the Company Logo* dialog box appears.



The logo is centered in the upper area with the logo's shorter dimension (length or height) fitting within the bounding box. Portions of the longer dimension are blacked out. The square image in the lower area shows the portion of the logo that will be displayed on report headers if you click the **OK** button without making any changes.

- 6. Using the cursor controls for positioning images, adjust the bounding box so that it encloses the portion of the logo that you want to place on report headers. Note that the size of the logo in the lower area changes so that your selection will fit within the square image.
- When you have specified the portion of the logo to appear in report headers, click the OK button. The logo appears in the Report Header area along with the *Clear Company Logo* icon. To clear the current logo and select another, click the icon.



8. Click the Save button to save the new report header.

### To configure print options

If DataGuard is enabled, your role must include the *Customize Print Options* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the General tab.
- In the *Print Options* area (Figure 2-1, at c), select the Add Signature Block to Report option to add a manual signature-block to the end of a protocol result that is exported or printed.

Add Signature Block to Rep	port
Orientation	
Best Fit	,
Fill Signature Lines	
Fill Blank Comment Lines	

- 4. Select the orientation for printed reports:
  - Best Fit (landscape or portrait)
  - Landscape
  - Portrait

**5.** If DataGuard is enabled, select (check mark) or de-select (no check mark) the *Fill Signature Lines* option.

When a protocol result that includes one or more signatures is exported or printed, this option (when selected) places the following text on the *Signature* line: *[Electronically Signed by Name]* where *Name* is the name of the user who signed the protocol result. This option has no effect on signatures displayed by clicking the **Signatures** button.

6. If DataGuard is enabled, select or de-select the Fill Blank Comment Lines option.

When a protocol result that includes one or more signatures is exported or printed, this option (when selected) places the following text on a blank *Comments* line: [No comment entered]. This option has no effect on signatures displayed by clicking the **Signatures** button.

7. Click the Save button to save the new report options.



**NOTE:** To restore the factory settings for print options, click the **Defaults** button and then click the **Save** button.

### To configure default graph data

Use the *Default Graph Data* fields to select the graph parameters to include by default on displayed, printed, and exported report data. You can change the parameters when you display the data.

If DataGuard is enabled, your role must include the *Customize Default Report Graphs* permission.

- 1. Click the *Management icon* and select *Settings* on the *Management* menu.
- 2. Click the General tab.
- **3.** In the *Default Graph Data* area (Figure 2-1, at *d*), select the options for the types of data to appear by default when printed graphs are created.

Default Graph Data		
🖌 тос	✓ rCond	
🖌 тс	🖌 Temp	
✓ IC	✓ tCond	
		Defaults

4. Click the Save button to save the new defaults for the types of graph data.



**NOTE:** To restore the factory settings for the types of graph data, click the **Defaults** button and then click the **Save** button.

#### To specify the default time zone for imported data

DataShare Elite stores timestamp values in UTC (Coordinated Universal Time) and displays those values either with or without the UTC offset, based on the status of the *Show UTC* setting. (For more information about the *Show UTC* setting, see <u>"To configure the date and time format" on page 19</u>) When you import data files, you specify the time zone in which the Analyzers that produced the data files are located. For example, suppose you import a file from an Analyzer located in Boulder, Colorado, U.S.A. When you import the file, you select the Time Zone value (*UTC-07:00*) *Mountain Time (US & Canada)*. The value you select in this procedure for the *Time Zone for Imported Data* setting specifies the default value that appears in the *Time Zone* field when you import files into DataShare Elite. You can change the default value during the import. For more information, see <u>"To manually import data files into DataShare Elite" on page 83</u>.

If DataGuard is enabled, your role must include the *Customize Time Zone for Imports* permission.

- 1. Click the *Management icon* and select *Settings* on the *Management* menu.
- **2.** Click the *General* tab.
- **3.** In the *Import Options* area (Figure 2-1, at e), select the UTC offset for importing time values from the *Time Zone for Imported Data* list. For example, to import time values into the Mountain Time Zone, select (UTC-07:00) Arizona.

Import Options	
Time Zone for Imported Data	
(UTC) Coordinated Universal Time	•

4. Click the Save button.

## **Configuring Displayed Data Settings**

On the *Displayed Data* screen, you can specify the headings and data that appear in the DataShare Elite application, on printed reports, and in exported files.



Figure 2-2: Displayed Data Tab

a - Application Display b - Printed Report Display c - Export Display

Displayed Data settings filter what data is able to be viewed, **not** what data is imported. When DataShare Elite is connected to Analyzers or DataPro2, it imports and stores **all** data by default. To change which data is displayed, modify the selections on the *Displayed Data* tab of the *Settings* screen.



**NOTE:** DataShare Elite enables filtering of which data types are imported and stored when data files are manually imported by the user.See <u>Chapter 4</u>, <u>"Importing Data"</u> for instructions on automatically and manually importing data from Analyzers and other sources.

#### To configure the data displayed in the DataShare Elite application

If DataGuard is enabled, your role must include the *Customize Displayed Application Data* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the *Displayed Data* tab.
- **3.** In the *Application Display* area (Figure 2-2, at **a**), select the headings and data to display in the DataShare Elite application.

Application Display	
✓ Protocol Name	✓ TOC
✓ Sample Mode	TC
🖌 Analyzer Name	✓ IC
🖌 Analyzer Type	✓ rCond
✓ Analyzer S/N	<ul> <li>Temperature</li> </ul>
✓ Sample Type	✓ tCond
✓ Lot #	Res
Rejected Repetitions	tRes
Flush Time	Autoreagents
✓ Acid Rate	Turbo
✓ Oxidizer Rate	ICR
Location	Error Debug
Site	Cond Algorithm
Region	
	Defaults

**4.** Click the **Save** button to save your selections for data displayed in the DataShare Elite application. If you do not want to save your changes, click the **Revert** button to restore the values prior to your changes.



**NOTE:** To restore the factory settings for the data displayed on DataShare Elite screens, click the **Defaults** button and then click the **Save** button.

### To configure the data printed on reports

If DataGuard is enabled, your role must include the *Customize Displayed Report Data* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the *Displayed Data* tab.
- **3.** In the *Printed Report Display* area (Figure 2-2, at **b**), select the headings and data to be printed on reports.

Printed Report Display	
✓ Protocol Name	✓ ТОС
✓ Sample Mode	✓ тс
🖌 Analyzer Name	✓ IC
🖌 Analyzer Type	✓ rCond
✓ Analyzer S/N	✓ Temperature
✓ Sample Type	✓ tCond
✓ Lot #	Res
Rejected Repetitions	tRes
Flush Time	Autoreagents
✓ Acid Rate	🗌 Turbo
✓ Oxidizer Rate	ICR
Location	Error Debug
Site	Cond Algorithm
Region	
	Defaults

 Click the Save button to save your selections for data printed on reports. If you do not want to save your changes, click the Revert button to restore the values prior to your changes.



**NOTE:** To restore the factory settings for the headings displayed on printed reports, click the **Defaults** button and then click the **Save** button.

### To configure the data exported to files

If DataGuard is enabled, your role must include the *Customize Displayed Export Data* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the *Displayed Data* tab.
- In the Export Display area (Figure 2-2, at c), select the headings and data to export to files.

Export Display	
✓ Protocol Name	✓ TOC
✓ Sample Mode	✓ TC
✓ Analyzer Name	✓ IC
🖌 Analyzer Type	✓ rCond
✓ Analyzer S/N	✓ Temperature
✓ Sample Type	✓ tCond
✓ Lot #	Res
Rejected Repetitions	tRes
Flush Time	Autoreagents
✓ Acid Rate	Turbo
✓ Oxidizer Rate	ICR
Location	Error Debug
Site	Cond Algorithm
Region	
	Defaults

 Click the Save button to save your selections for data exported to files. If you do not want to save your changes, click the Revert button to restore the values prior to your changes.



**NOTE:** To restore the factory settings for the headings displayed in files containing exported data, click the **Defaults** button and then click the **Save** button.

## Configuring Reports / Exports Settings

On the *Reports / Exports* screen, you can specify which output file types are enabled for saving reports and exported data, the names of the exported files, and the default folders in which the output files are placed.

### To configure which output file types are enabled

If DataGuard is enabled, your role must include the *Customize Allowed Export Types* permission.

- 1. Click the *Management*  $\checkmark$  icon and select *Settings*.
- 2. Click the Reports / Exports tab.

<b>Ⅲ</b> ∽∽	A Management Settings Default Options General Displayed Dat Perports / Exports		b 	c	•••
بد € (י)	Enabled Output File Types Text JPG CSV PNG PDF PDF (Password Protected) Resed-Only Password Excel Excel (Password Protected) Password Read-Only V Defaults	Export File Names Sample Results Sample Results Sample Results Report Sample Results Report Protocol Results Protocol Results Calibration, Results Verifications Verification, Results Validation, Results Validation, Results	Analyzer Errors         Analyzer_Errors         Analyzer_Audit Trail         DataPro Audit Trail         DataPro Audit Trail         DataShare Errors         DataShare Audit Trail         DataShare Audit Trail	Default Output Folders   Text Folder   CSV Folder   DF Folder   Drote Folder   Drote Folder   DP Folder   DP Folder   DP Folder   Drotected Excel Folder   Drotected PDF Folder	Revert



a - Enabled Output File Types	<b>b</b> - Export File Names	<b>c</b> - Default Output Folders
-------------------------------	------------------------------	-----------------------------------

In the *Enabled Output File Types* area (Figure 2-3, at *a*), select the types of output files to enable: Text, CSV, PDF, PDF (Password Protected), Microsoft Excel, Microsoft Excel (Password Protected), JPG, and/or PNG.

Enabled Output File T	ypes	
✓ Text	JPG	
CSV	V PNG	
PDF		
PDF (Password Protect)	ed)	
Password		
•••••	۵ 🔼	
Mode		
Read-Only	•	
✓ Excel		_
Excel (Password Protec	cted)	
Password		
	Ø	
Mode		
Read-Only	~	
	Defaults	

- 4. If you selected PDF (Password Protected) and/or Microsoft Excel (Password Protected), specify:
  - **Password**: Use this field to set a default password for protected output file types. Users (with the *Customize Allowed Export Types* permission) have the option to choose their own password for these protected files or use the default password that is set here in Settings. If the *Password* field is left blank in Settings, users must specify a password when they select a protected output file type.
  - **Mode**: Fully Encrypted or Read-Only. A user must enter the password to open a fully encrypted file. A user can open a read-only file without the password, but the user must enter the password to change the contents of the file.
- Click the Save button to save your selections for enabled output file types. If you do
  not want to save your changes, click the Revert button to restore the values prior to
  your changes.

If you selected a password protected file-type option, the *Clear Password* icon appears at the end of the *Password* field. Click the icon to remove the password. You can then specify another password and click the **Save** button again.



**NOTE:** To restore the factory settings for enabled output types, click the **Defaults** button and then click the **Save** button.

### To configure the default names of export files

You can specify default name prefixes for the files that DataShare Elite generates when you export data.

If DataGuard is enabled, your role must include the *Customize Export File Name* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the *Reports / Exports* tab.
- 3. In the Export File Names area (Figure 2-3, at b), specify the name for each type of exported file. When a user exports a file, the name is followed by a timestamp and a number. For example, an Administrator changes the export file name for Calibrations to Calibrations. On 20 October 2020, the Administrator exports the results file for a calibration protocol and chooses the Microsoft Excel output type. The name of the exported file will be Calibrations\_2020-10-20\_number.xlsx, where number is a number generated by DataShare Elite.

Export File Names					
Sample Results	Analyzer Errors				
Sample_Results	Analyzer_Errors				
Sample Results Report	Analyzer Audit Trail				
Sample_Results_Report	Analyzer_Audits				
Protocol Results	DataPro Audit Trail				
Protocol_Results	DataPro_Audits				
Calibrations	DataShare Errors				
Calibration_Results	DataShare_Errors				
Verifications	DataShare Audit Trail				
Verification_Results	DataShare_Audits				
Validations	Audit Trail Report				
Validation_Results	Audit_Trail_Report				
	Defaults				

Click the Save button to save your selections for the names of export files. If you do
not want to save your changes, click the Revert button to restore the values prior to
your changes.



**NOTE:** To restore the factory settings for the names of export files, click the **Defaults** button and then click the **Save** button.

### To configure the default output folders

You can choose different folders that DataShare Elite displays as default options when you save output files.

If DataGuard is enabled, your role must include the *Customize Export Paths* permission.

- 1. Click the *Management >* icon and select *Settings* on the *Management* menu.
- 2. Click the *Reports / Exports* tab.
- 3. Locate the *Default Output Folders* area (Figure 2-3, at c).

Default Output Folders
Text Folder
CSV Folder
JPG Folder
PNG Folder
Excel Folder
Protected Excel Folder
PDF Folder
Protected PDF Folder

- **4.** To specify the names of default output folders for each type of output file, click the *Folder* **→** icon. The corresponding Windows *Select Folder* window appears.
- 5. Navigate to a folder for storing the files of the selected output type, highlight the folder, and click the **Select Folder** button.
- **6.** Repeat Step 4 and Step 5 for each file type you have selected.
- 7. Click the Save button to save your selections for the paths to and names of default output folders. If you do not want to save your changes, click the **Revert** button to restore the values prior to your changes.

# Managing Analyzers, Locations, Sites, and Regions

### The Analyzers Screen

When you import a file containing sample, protocol, error, or audit trail data, the DataShare Elite database includes the type and serial number (S/N) of the Analyzer or Sensor associated with the data. To see a list of these Analyzers and Sensors, click the *Management* icon and select *Analyzers*. The *Analyzers* screen appears with four tabs: *Analyzers, Locations, Sites,* or *Regions*. The active tab has a colored underline.

Figure 2-4 shows the *Analyzers* screen with the *Analyzers* tab selected. The *Analyzers* table in the upper portion of the screen lists all the Analyzers, by type and serial number (S/N), that have been entered into DataShare Elite. You can enter an Analyzer into DataShare Elite either by importing data associated with the Analyzer or by adding an Analyzer directly on the *Analyzers* tab of the *Analyzers* screen.

The *History* table in the lower portion of the screen shows the location history of an Analyzer selected in the Analyzers table. In Figure 2-4, for example, the *M500* Analyzer with S/N *1234* was located in *Building 1, Boulder, Western US* on *01 Feb 2022*. The Analyzer was moved to *Building 2, Boulder, Western US* on *27 May 2024*.

The *Has Data*? column indicates whether Analyzer data has been imported into DataShare Elite.

ſ

Figure 2-4 shows region, site, and location data for each Analyzer and Sensor listed. An analyzer resides in a location, which is a subset of a site, which is a subset of a region. Although these specific areas are typically geographic in nature, any designation can be used. For more information, see <u>"To set up regions, sites, and locations and assign Analyzers to locations" on page 35</u>.

	Management Analyzers					
~~ \$	Analyzers Has Data? Analyzer Name A M500 #1 0006	Analyzer S/N         IP Analyzer S/N           M500         1234           M9         0006	Idress Location Building 2 Lab 17	Site Boulder Aubervillers	Region Western US France	©_
ai						
с —	History - M500 [1234] Suart Date Location 27 May 2024 01 Feb 2022	S Building 2 Building 1	te Boulder Boulder	Region Western US Western US		C-
		Figure 2-4: A	nalyzers Tab wit	n Analyzers and His	tory Tables	
a -	Analyzers tabl	e <b>b-</b> Ex	pand top table	<b>c</b> - History table	e <b>d -</b> Expand b	oottom table

To individually see a view of either the *Analyzers* table (Figure 2-4, at **a**) or the *History* table (Figure 2-4, at **c**), click the corresponding *Expand*  $\leq$  button for that table (Figure 2-4, at **b** and **d**). The selected table expands to a full screen view and the *Expand*  $\leq$  button changes to the *Show Split View*  $\leq$  button (Figure 2-5).



Figure 2-5: Analyzers Tab with Expanded Analyzers Table

To return to the view of both tables, click the **Show Split View v** button.

# To set up regions, sites, and locations and assign Analyzers to locations

Follow these procedures in order:

- <u>"To create regions"</u>
- <u>"To create sites and assign them to regions" on page 37</u>
- "To create locations and assign them to sites" on page 39
- <u>"To assign Analyzers to locations" on page 40</u>

#### To create regions

1. Click the *Management*  $\checkmark$  icon and select *Analyzers*.



The Analyzers screen appears.

Ma Ana	nagement								
Regions	Sites	Locations	Analyzers						
Analyzers									¥
Has Data?	Analyzer Name	Analyzer Type	Analyzer S/N	IP Address	Location	Site	•	Region	
~		M500	1234						_
v		M9	0006						
	dd	Edit		Dalata					
		Luit		Delete					
History -	M9 [0006]			Gra		Perion			*
Start Date	Location			arte		Region			

Figure 2-6: Analyzers Tab of Analyzers Screen w/o Region, Site, or Location Data

2. Click the *Regions* tab, and then click the **New** button. The *Manage Locations* dialog box for regions appears (Figure 2-7).

Manage Locat	ions						×
Regions	Sites	Locations	Analyzers				
Regions				]0			
			Sites	-			
			Available		Selected		
					•		
					•		
A	рріу	ancel					
						Save	Cancel
						Save	Curren

Figure 2-7: Manage Locations Dialog Box for Regions
**3.** Type the name of the new region in the *Region:* field. The name can have from one to 40 characters.



**NOTE:** Typically, Region refers to a geographic area. However, it is not limited to such usage. Apply any name that fits with the organizational structure you prefer.

- 4. Click the Apply button.
- **5.** Repeat Step 3 and Step 4 for each new region. When you finish creating regions, click the **Save** button. The names of the new regions appear on the *Regions* screen.
- **6.** If you are setting up regions, sites, and locations, and assigning Analyzers to them, continue with Step 2 of <u>"To create sites and assign them to regions"</u>.

#### To create sites and assign them to regions

- 1. Click the *Management* fi icon and select *Analyzers* on the *Management* menu. The *Analyzers* screen appears.
- 2. Click the *Sites* tab, and then click the **Add** button. The *Manage Locations* dialog box for sites appears (Figure 2-8).

🔳 Manage Locatio	ons		×
Regions	Sites	Locations	Analyzers
Sites			9
			Region: None
			Locations
			Available Selected
			4
Ар	oply	Cancel	
-			Save Cancel

Figure 2-8: Manage Locations Dialog Box for Sites

**3.** Type the name of the new site in the *Site:* field. The name can have from one to 40 characters.



4. Select a region from the *Region:* list.



**NOTE:** If you select None on the Region: list, the new site is not associated with a region.

Nanage Locatio	ons		
Regions	Sites	Locations	Analyzers
Regions	Sites	Locations	Analyzers       Boulder       Region:     None       Locatic     Central - US       Valiab     Western - US       Eastern - US     France       Japan     Hungary
Aŗ	oply	Cancel	
			Save Cancel

- 5. Click the Apply button.
- 6. Repeat Step 3 through Step 5 for each new site.
- 7. When you finish creating sites, click the **Save** button. The names of the new sites appear on the *Sites* screen.
- **8.** If you are setting up regions, sites, and locations, and assigning Analyzers to them, continue with Step 2 of <u>"To create locations and assign them to sites"</u>.

#### To create locations and assign them to sites

- 1. Click the *Management >* icon and select *Analyzers*. The *Analyzers* screen appears.
- 2. Click the *Locations* tab, and then click the **Add** button. The *Manage Locations* dialog box for locations appears (Figure 2-9).

🔳 Manage Locatio	ns			×
Regions	Sites	Locations	Analyzers	
Locations				
			Site: None 💌	
			Region: None 💌	
Ap	ply Car	ncel		
				Save Cancel

Figure 2-9: Manage Locations Dialog Box

- **3.** Type the name of the new location in the *Location:* field. The name can have from one to 40 characters.
- **4.** Select a site from the *Site:* list. The region associated with the site appears in the *Region:* list.

Regions	Sites	Locations	Analyzers	
Locations			Bio La	b
Bio Lab				
Building 1			Site:	Bio Lab
			Region:	Japan



**NOTE:** If you select a region from the Region: list, the name of a site associated with the region appears in the Site: list. You can then select another site in the same region on the Site: list.

- 5. Click the Apply button.
- 6. Repeat Step 3 through Step 5 for each new location.
- **7.** When you finish creating locations, click the **Save** button. The names of the new locations appear on the *Locations* screen along with their corresponding sites/ regions.

≣	Management Analyzers		
~~~	Regions Sites Locations Analyzers		
	Has Analyzers? Location	Site	Region
× .	Building 1	Boulder	Western - US

**8.** If you are setting up regions, sites, and locations, and assigning Analyzers to them, continue with Step 2 of "To assign Analyzers to locations".

#### To assign Analyzers to locations

- 1. Click the *Management >* icon and select *Analyzers*. The *Analyzers* screen appears.
- 2. Click the Analyzers tab.
- **3.** Select an Analyzer or Sensor from the *Analyzers* list (Figure 2-10, at **a**) and click the **Edit** button. The *Manage Locations* dialog box for Analyzers appears.

		a I					b I					
Manage Locatio	ons Sites	Locations	Analyzers									×
Analyzers Has Data? Ty	pe M500	S/N	Name	<u> </u>	M9 [0006] Analyzer Name:			Analyzer Type:	M9			
√	M9	0006			Serial Number: 000	06	IP Address	:		I		
					Locations							
	Арр	oly Cance	9		Add							
									Save	2	Cancel	
		Fig	ure 2-10	): <i>M</i> a	nage Locatio	ons Dia	og Bo	x for Ana	lyzer	S		
	<b>a -</b> Ana	alyzer Li	st		<b>b -</b> Analy	zer Nar	ne		C ·	- Loca	tions	

**4.** Click the **Add** button at the bottom of the *Locations* area (Figure 2-10, at c). A row of *Location History* data for the Analyzer appears in the *Locations* area of the dialog box.

🔳 Manage Lo	ocations									×
Regions	Sites	Locations	Analyzers							
Analyze Has Data?	Type	S/N	Name	M9 [0006]	M9 - Lab 1		Analyzer Type:	М9		
1	M500	1234		, and year realised			, and year type.	in s		
~	M9	0006		Serial Number:	0006	IP Address:				
				Locations						
				Start Date	Location		Site		Region	
				X 15 16 Apr	2024 None	9-	None	•	None	•
	Арј	oly Cance	d	Add						
								Save	e	Cancel

**5.** Specify the *Start Date:* the date on which the Analyzer was put in service at the specified location:

To specify a date, you can:

- Type the date in the Start Date field.
- Select the date by clicking the *Calendar* 15 icon next to the date field. A calendar appears.



If the calendar displays the month and year you want, click the day you want.

Use the **Previous and Next buttons to navigate to the month and year, then click the day you want.** 

6. Select the location for the Analyzer on the *Location* list. The site and region associated with the location appear in the *Site* and *Region* lists.



**NOTE:** Selecting a region from the Region: list shows the names of an associated location and site. You can select another site and another location.

7. If the Analyzer was put in service at the another location on a different date, click the **Add** button again. Another row of *Location History* data for the Analyzer appears in the *Locations* area of the dialog box above the row whose data you just specified.

Loca	Locations												
	Star	t Date	Location		Site		Region						
x	15	24 Apr 2024	None	•	None	•	None	•					
x	15	27 Mar 2024	Building 1	•	Boulder	•	Western - US	•					

8. Repeat Step 5 and Step 6 for the new start date and location.



**NOTE:** To delete an Analyzer location, select it in the Locations list and click the Delete icon next to the location row.

- **9.** When you finish specifying start dates and locations for the Analyzer, click the **Apply** button.
- **10.** Select the next Analyzer in the Analyzer table, and click the **Edit** button. The **Add** button reappears at the bottom of the *Locations* area.
- **11.** Repeat Step 4 through Step 9.
- **12.** When you finish specifying start dates and locations, click the **Save** button. The *Analyzers* tab on the *Analyzers* screen reappears with the location, site, and region data.

#### To add an Analyzer or Sensor

DataShare Elite adds an Analyzer or Sensor automatically when you import data for the Analyzer or Sensor. Use this procedure to manually add an Analyzer or Sensor to DataShare Elite before you import data for it.

- 1. Click the *Management >* icon and select *Analyzers*. The *Analyzers* screen appears.
- **2.** Click the *Analyzers* tab.
- **3.** Click the **Add** button. The *Manage Locations* dialog box for Analyzers appears, with a *New Analyzer* section on the right (<u>Figure 2-11</u>).

Regions Sites Locations     Analyzers   Has Data?   Yype   M500   1234   M500   Locations     Start Date     Location     Start Date     Apply   Cancel	🖪 Manage Loca	ations	a 					b 			×
M500       1234       M500 - Lab 2         M9       0006       M9 - Lab 1         Locations       Image: Control of the second	Regions Analyzer Has Data?	Sites	Locations S/N	Analyzers	Ne	w Analyzer	[	<u> </u>			٦
Apply       Cancel	1	M500 M9	1234	M500 - Lab 2 M9 - Lab 1	An	alyzer Name: erial Number:	0000	IP Address:	Analyzer Type:	M500 -	
		AF	oply Cance	a		Start Date	Location		Site	Region	

Figure 2-11: Manage Locations Dialog Box for Adding New Analyzer

**a** - Analyzer List **b** - Analyzer Name, Type, Serial Number **c** - Locations

- **4.** Select the Analyzer Type from the *Analyzer Type:* list (<u>Figure 2-11</u>, at **b**).
- 5. Type a serial number in the *Serial Number:* field.



**NOTE:** You cannot change the serial number after you save the information for the new Analyzer. You must delete the Analyzer and add it again with a different serial number.

6. Click the Add button. A row of *Location History* data for the new Analyzer appears in the *Locations* area of the dialog box.

New	Analyze	r						
Analyz	zer Name	M53	10C #1		Analyzer Type:	M5310C	. •	
Seria	l Numbe	1234	5	IP Address:				
Locat	tions							
	Start Dat	9	Location		Site	F	Region	
×	15 23 A	pr 2024	None	<b>9</b> -	None	•	None	•
	Add							

7. Specify the *Start Date:* the date on which the new Analyzer was put in service at the specified location.

To specify a date, you can:

- Type the date in the *Start Date* field.
- Select the date by clicking the *Calendar* 15 icon next to the date field. A calendar appears.

			Lo	catio	ons			
		[		5	Start	Date		L
				x	15	21 M	ar 2024	
	•		Mai	rch 2	024			
	Su	Мо	Tu	We	Th	Fr	Sa	
	25	26	27	28	29	1	2	
	3	4	5	6	7	8	9	
	10	11	12	13	14	15	16	
	17	18	19	20	21	22	23	
	24	25	26	27	28	29	30	
	31	1	2	3	4	5	6	
L								

If the calendar displays the month and year you want, click the day you want.

Use the **Previous and Next buttons to navigate to the month and year, then click the day you want.** 

8. Select the location for the new Analyzer on the *Location* list. The site and region associated with the location appear in the *Site* and *Region* lists.



**NOTE:** If you select a region from the Region: list, the names of a location and site associated with the region appear in the Location and Site lists. You can then select another site in the same region on the Site list and another location at the same site on the Location list.

- **9.** If the new Analyzer was put in service at the another location on a different date, click the **Add** button again. Another row of *Location History* data for the new Analyzer appears in the *Locations* area of the dialog box above the row whose data you just specified.
- **10.** Repeat Step 7 and Step 8 for the new start date and location.



**NOTE:** To delete an Analyzer location, click the Delete icon next to the location row to be deleted.

- **11.** When you finish specifying start dates and locations for the new Analyzer, click the **Apply** button.
- **12.** Click the **Save** button. The new Analyzer appears on the *Analyzers* tab on the *Analyzers* screen.

≣	Ana	<b>inagement</b> lyzers						
-0.0	Regions	Sites	Locations	Analyzers				
0-0-	Analyzer	s						
	Has Data?	Analyzer Name	Analyzer Type	Analyzer S/N	IP Address	Location	Site	Region
× 1	~	M500 - Lab 2	M500	1234		Building 1	Boulder	Western - US
		M5310C #1	M5310C	12345		Bio Lab	Bio Lab	Japan
<b>A</b>	~	M9 - Lab 1	M9	0006		Bio Lab	Bio Lab	Japan



**NOTE:** In the figure above, note that because DataShare Elite has not imported data from the new Analyzer, there is no check in the Has Data column.

#### To edit a location

- 1. Click the *Management >* icon and select *Analyzers*. The *Analyzers* screen appears.
- 2. Click the *Locations* tab. A list of locations appears (Figure 2-12).

≣	Management Analyzers				
ممہ	Regions Sites	Locations Analyzers			
v v-	Locations				
50	Has Analyzers? Location		Site	Region	
· ·	Bio Lab Building 1		Boulder	Western - US Western - US	
6					
i					
-					
Ċ					
	Add	Edit Delete			

Figure 2-12: Locations Tab on Analyzers Screen with Data

**3.** Select the location to edit, and click the **Edit** button. The *Manage Locations* dialog box for locations appears (below). It shows the name of the location as well as the site and region assigned to the location.

Manage Locatio	ons				×
Regions	Sites	Locations	Analyzers		
Locations			Building 1		
Bio Lab					
Building 1			Site: Boulder		
			Region: Western - US 🔹		
_	_				
Ap	oply Ca	ancel			
				Save	Cancel

- 4. Edit the name of the location or select a new site or region, as needed.
- 5. When you finish, click the **Apply** button, then click the **Save** button.

#### To edit a site

- 1. Click the *Management*  $\checkmark$  icon and select *Analyzers*.
- 2. Click the *Sites* tab. A list of sites appears. When a site is selected, the locations assigned to that site appear on the right portion of the screen.

Nanage Locatio	ons		×
Regions	Sites	Locations	Analyzers
Sites			Boulder
Bio Lab			Pagion Water IC
Boulder			Region: Western - US
			Locations
			Building 1
New	Edit	Delete	
			Save Cancel

**3.** Select the site to edit, and click the **Edit** button. The *Manage Locations* dialog box for sites appears. It shows the name of the location as well as the site and region assigned to the location.

Manage Locatio	ins		x
Regions	Sites	Locations	Analyzers
Sites			Boulder
Bio Lab			Barian Water IIC
Boulder			Region: Western - US
			Locations
			Available Selected
			Bio Lab Building 1
			4
Ap	ply	Cancel	
			Save

4. Edit the name of the site or select a new region, as needed.

- To add a location to the site, select the location (*Ctrl*+select to select more than one location) in the *Available* pane and click the right ► arrow to move it to the *Selected* pane.
- 6. To remove a location from the *Selected* pane, select the location and click the left arrow to move it back to the *Available* pane.
- 7. Repeat Step\_5 and Step 6, as needed.
- 8. When you finish, click the **Apply** button.
- 9. Click the **Save** button. The *Sites* tab on the *Analyzers* screen reappears.

#### To edit a region

Use this procedure to edit the information about a region.

- 1. Click the *Management*  $\checkmark$  icon and select *Analyzers*.
- 2. Click the *Regions* tab. A list of regions appears. When a region is selected, the sites assigned to that region appear on the right portion of the screen.

Manage Locat	ons				×
Regions	Sites	Locations	Analyzers		
Regions			Central - US		
Central - US			Sites		
Eastern - US					
France					
Hungary					
Japan					
Western - US					
New	Edit	Delete			
				Save	Cancel

**3.** Select the region to edit, and click the **Edit** button. The *Manage Locations* dialog box for regions appears. It shows the name of the region as well as the sites assigned to the region.

Manage Locations			×
Regions Sites Locations	Analyzers		
Regions	Hungary		
Central - US	Sites		
Eastern - US	Available	Selected	
France	Bio Lab		
Hungary	Boulder		
Japan			
Western - US			
		•	
Apply Cancel			
		Save	Capcol

- **4.** Edit the name of the region, as needed.
- 5. To add a site to the region, select the site (*Ctrl*+select to select more than one site) in the *Available* pane and click the right ► arrow to move it to the *Selected* pane.
- 6. To remove a site from the *Selected* pane, select the site and click the left < arrow to move it back to the *Available* pane.
- 7. Repeat Step 5 and Step 6, as needed.
- 8. When you finish, click the **Apply** button.
- 9. Click the **Save** button. The *Regions* tab on the *Analyzers* screen reappears.

# CHAPTER 3: DATAGUARD

Sievers DataGuard is an optional set of security capabilities for DataShare Elite that provides a complete 21 CFR Part 11 compliant solution using the following:

- Administratively controlled user-level security.
- Signing abilities that assign ownership by designated and controlled system actions.
- An audit trail system that records most DataShare Elite system changes and actions, including the chronology of events that create and modify data. All Analyzer audit trail data imported into DataShare Elite is part of the audit trail system.

# ACTIVATING DATAGUARD

The DataGuard option is activated during DataShare Elite installation as a component of the activation key file supplied by Sievers. For more information, see <u>"Activating DataShare Elite" on page 15.</u>

DataGuard can be activated as a standalone security solution, or configured to work with Active Directory. When DataGuard is installed with Active Directory, all DataShare Elite users must have an Active Directory User ID and Domain. Active Directory maintains the User IDs and their passwords. DataShare Elite Administrators add users by specifying their Active Directory User IDs and assigning the users a DataShare Elite User Role, Access Level, and Status

# SETTING UP DATAGUARD

This section explains how to set up:

- User IDs
- User Roles
- Access Levels
- Permissions
- Other security settings

After activating DataGuard-enabled DataShare Elite, the first task is to set up an Administrator account that can set up the rest of the users and security settings. All permissions associated with user account management, database maintenance, and export file management are assigned to the Administrator role by default, but can be changed later. See <u>"To change the permissions assigned to User Roles" on page 54</u>.

#### To set up the Administrator account

- **1.** Complete the following:
  - User ID
  - Domain (when Active Directory is being used)
  - First Name
  - Middle Initial (optional)
  - Last Name



**NOTE:** If Active Directory is being used, Domain must be defined and the User ID must match a user in the Active Directory system. The name fields will populate automatically

- 2. Verify the Role: list is set to Administrator.
- 3. Verify the Status: list is set to Active.
- 4. Verify the Access Level: list is set to Global.
- 5. Type a password in the New Password field. Re-type it in the Confirm Password field.



**NOTE:** The default requirements for the password are: between 6 and 150 characters with at least one upper case letter and one number. Once the first user account is established, the password requirement settings are configurable (See <u>"Configuring DataGuard Security Settings" on page 73</u>).

6. Click the Activate button to save the new Administrator account.



**NOTE:** After saving a User ID, the User ID and user name cannot be modified.

After DataGuard is activated, all users will be required to log in when they next open DataShare Elite. For more information, see <u>"Using DataShare Elite after DataGuard Is</u><u>Enabled" on page 78</u>.

# **CONFIGURING DATAGUARD AND MANAGING SECURITY**

After you install DataGuard, configure its settings. Refer to:

- "Managing User Roles"
- "Managing User Accounts" on page 61
- "Setting Up Access Levels" on page 69
- "Configuring DataGuard Security Settings" on page 73



**NOTE:** A user must have a role with the appropriate permissions to view the DataGuard screens and make changes to the options on the screens. Refer to "Permissions and Permission Abilities" on page 56.

# Managing User Roles

Although the default User Roles are appropriate for most installations, DataShare Elite allows the creation and customization of User Roles. To manage User Roles and permissions on the User Roles screen, click the DataGuard a icon and select User Roles. Here, you can view existing User Roles, create new ones, and customize their assigned permissions. The ability to manage User Roles requires a User ID that has been assigned the Administrator role or has the Manage Roles permission.

To reference the available permissions and their abilities, see Table 1, "Permissions and Permission Abilities," on page 56.



**NOTE:** Users whose assigned User Roles include permissions to customize the way that DataShare Elite works (for example, to customize the data that DataShare Elite displays) have both Custom Options and Default Options on the three tabs of the Settings screen. For more information, see "DataGuard: Custom and Default Settings" on page 70.

This section includes the following procedures:

- "To create a User Role and assign it permissions" on page 53
- "To change the permissions assigned to User Roles" on page 54 •
- "To delete a User Role" on page 60

#### To create a User Role and assign it permissions

Use this procedure to establish a new User Role and assign permissions to it, defining areas of access and which tasks can be performed within DataShare Elite. For more information on available permissions, see <u>Table 1, "Permissions and Permission</u> <u>Abilities," on page 56</u>.

1. Click the *DataGuard* fi icon and select *User Roles* on the *DataGuard* menu. The *User Roles* screen appears. Select a role in the table to see the permissions assigned to the role.

≣	DataGuard User Roles				
	Role	# Permissions	Assigned Users	Administrator	
৽৵৵৽	Administrator	25	1	Permission	
	Operator	47	0	Activate Features	
×	Supervisor	70	0	Add User Archive Database	
	Test	83	1	Backup Database	
8				Change User Access Level Change User Password	
				Change User Role	
				Change User Status Configure Archive Settings	
•				Configure Backup Settings	
				Customize Allowed Export Types Customize Export File Name	
				Customize Export Paths	
				Manage Analyzer Locations	
				Manage DataGuard Settings	
				Manage Remote Data Sources Manage Roles	
				Print User List	
				Set Default Allowed Export Types	
				Set Default Export File Name	
				Set Default Export Paths Set Default Time Zone for Imports	
				View User List	
	Add Edit Delete				

Figure 3-1: User Roles Screen

2. Click the Add button. The *Create User Role* dialog box appears.

Create User Rol	e				×
Role Name			•		
Permissio	ons				
Available			Selected		
Acknowled	ge DataShare Error	•			9
Activate Fe	atures				
Add User					
Archive Da	tabase				
Backup Da	tabase				
				ОК	Cancel

Figure 3-2: Create User Role Dialog Box

- 3. In the *Role Name* field, type a name for the new User Role, such as *Lab Manager*.
- **4.** To assign a permission to the User Role, select a permission in the *Available* pane (press *Ctrl*+select for more than role) and click the right ► arrow to move it to the *Selected* pane.
- 5. To remove a permission from the *Selected* pane, select it and click the left < arrow to move it back to the *Available* pane
- 6. Repeat the previous Step 4 and Step 5, as needed.
- 7. Click the **OK** button to save. The new User Role appears on the User Roles screen.

#### To change the permissions assigned to User Roles

Use this procedure to revise the permissions assigned to a User Role, by adding new permissions or removing existing permissions. In addition, you can change the names of User Roles (except the three default User Roles provided with DataGuard: *Administrator, Operator,* and *Supervisor*). For more information on available permissions, see <u>Table 1,</u> <u>"Permissions and Permission Abilities," on page 56</u>.

- 1. Click the *DataGuard* ficon and select *User Roles* on the *DataGuard* menu. The *User Roles* screen appears.
- 2. Select the row in the table for the User Role you want to edit, and click the Edit button. The *Edit User Role* dialog box appears.

Create User Role	1			×
Role Name	Lab Manager			
Permissio	ns			
Available			Selected	
Customize I	Default Report Graphs	•	Acknowledge DataShare Error	•
Customize I	Display Formats		Activate Features	
Customize I	Displayed Application Data		Add User	
Customize I	Displayed Export Data		Archive Database	
Customize I	Displayed Report Data		Backup Database	
			ОК Са	incel

Figure 3-3: *Edit User Role* Dialog Box

- 3. To change the name of the User Role, type the new name in the *Role Name* field.
- **4.** To add a permission to the User Role, select the permission (*Ctrl*+select to select more than one permission) in the *Available* pane and click the right ► arrow to move the permission to the *Selected* pane.
- 5. To remove a permission from the *Selected* pane, select the permission and click the left < arrow to move the permission back to the *Available* pane.



**NOTE:** Some permissions require other permissions. For example, you must assign a User Role the View Trend Graph permission in order to assign the User Role the Print Trend Graph permission. DataShare Elite keeps track of required permissions and displays the Error Message **()** icon when a

required permission has not been assigned. Hover the mouse pointer over the icon to see the required permission.

- 6. Repeat Step 4 and Step 5, as needed.
- 7. Click the **OK** button to save. The edits to the User Role appear on the *User Roles* screen.



**NOTE:** In Table 1, the columns titled A, S, and O refer to the Administrator, Supervisor, and Operator roles. A mark in these boxes indicates whether the permission is default for that role.

#### **Table 1: Permissions and Permission Abilities**

Permission Names	Permission Abilities	A	S	0
Acknowledge DataShare Error	Acknowledge Analyzer and DataShare Elite error messages.		•	•
Activate Features	Display Activations option on Management 🗲 menu, and activate both DataGuard and different types of Analyzers.	•	•	•
Add User	On <i>Users</i> screen, add user.	•		
Archive Database	On <i>Database</i> screen, archive data to file.	•		
Backup Database	On <i>Database</i> screen, back up data to file.	•		
Change User Access Level	On Users screen, change Access Level assigned to user.	•		
Change User Password	On <i>Users</i> screen, change password assigned to user. <i>Notes:</i> 1) This permission allows user to change passwords of all other users. 2) When DataGuard is enabled with Active Directory, users cannot change their passwords in DataShare Elite.	•		
Change User Role	On <i>Users</i> screen, change role assigned to user.	•		
Change User Status	On <i>Users</i> screen, change Status assigned to user.	•		
Configure Archive Settings	On <i>Database</i> screen, set options to archive data automatically.	•		
Configure Backup Settings	On <i>Database</i> screen, set options to back up data automatically.	•		
Create Sample Results Reports	On <i>Samples</i> tab of <i>Sample Results</i> screen, create Sample Results Reports.		•	•
Customize Allowed Export Types	On <i>Reports / Exports</i> tab of <i>Settings</i> screen, customize <i>Enabled Output File Types</i> settings.	•	•	
Customize Default Report Graphs	On <i>General</i> tab of <i>Settings</i> screen, customize <i>Default Graph Data</i> settings.		•	
Customize Display Formats	On <i>General</i> tab of <i>Settings</i> screen, customize <i>Text Format</i> settings.		•	•
Customize Displayed Application Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, customize <i>Application Display</i> settings.		•	

Permission Names	Permission Abilities			0
Customize Displayed Export Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, customize <i>Export Display</i> settings.		•	
Customize Displayed Report Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, customize <i>Printed Report Display</i> settings.		٠	
Customize Export File Name	On <i>Reports / Exports</i> tab of <i>Settings</i> screen, customize <i>Export File Names</i> settings.	•	•	
Customize Export Paths	On <i>Reports / Exports</i> tab of <i>Settings</i> screen, customize <i>Default Output Folders</i> settings.	•	•	
Customize Print Options	On <i>General</i> tab of <i>Settings</i> screen, customize <i>Print Options</i> settings.		•	
Customize Report Header	On <i>General</i> tab of <i>Settings</i> screen, customize <i>Report Header</i> settings.		•	
Customize Time Zone for Imports	On <i>General</i> tab of <i>Settings</i> screen, customize <i>Time Zone for Imported Data</i> setting.	•	•	
Export Analyzer Audit Trail	On Analyzers tab of Audit Trail screen, export audit trail data.		•	•
Export Analyzer Error History	On Analyzers tab of Errors screen, export error data.		•	•
Export Archive Data	Export archived data displayed (using <i>Archive</i> option on <i>Data History</i> on menu) in DataShare Elite.		•	•
Export Calibration History	On <i>Calibrations</i> tab of <i>Protocol Results</i> screen, export calibration results data.		•	•
Export Data History	On <i>Sample Results</i> screen, export sample results data; on <i>User Protocols</i> tab of <i>Protocol Results</i> screen, export results of user protocols.		•	•
Export DataShare Audit Trail	On <i>DataShare Elite</i> tab of <i>Audit Trail</i> screen, export audit trail data.		•	•
Export DataShare Error History	On <i>DataShare Elite</i> tab of <i>Errors</i> screen, export error data.		•	•
Export Sample Results Reports	On <i>Samples</i> tab of <i>Sample Results</i> screen, export Sample Results Reports.		•	•
Export Validation History	On <i>Validations</i> tab of <i>Protocol Results</i> screen, export validation results data.		•	•
Export Verification History	On Verifications tab of Protocol Results screen, export verification results data.		٠	•
Import Data File	Display <i>Import</i> option on <i>Data History</i> ��� menu, and import data files.		•	•
Manage Analyzer Locations	On <i>Analyzers</i> tab of <i>Analyzers</i> screen, add Analyzers, change location to which Analyzers are assigned, and delete Analyzers.	•		
Manage DataGuard Settings	On <i>Security Settings</i> screen, configure DataGuard security settings.	•	•	

Permission Names	Permission Abilities	Α	S	0
Manage Remote Data Sources	On <i>Remote Data Sources</i> screen, add, edit, and remove Remote Data Sources.	•		
Manage Roles	On <i>User Roles</i> screen, add user roles, change permissions assigned to user roles, and delete user roles.	•		
Print Analyzer Audit Trail	On Analyzers tab of Audit Trail screen, print audit trail data.		•	•
Print Analyzer Error History	On Analyzers tab of Errors screen, print audit trail data.		•	•
Print Archive Data	Print archived data displayed (using <i>Archive</i> option on <i>Data History</i> •••• menu) in DataShare Elite.		•	•
Print Calibration History	On <i>Calibrations</i> tab of <i>Protocol Results</i> screen, print results of running Calibration protocol.		•	•
Print Data History	On <i>Samples</i> tab of <i>Sample Results</i> screen, print sample results; on <i>User Protocols</i> tab of <i>Protocol Results</i> screen, print results of user protocols.		•	•
Print DataShare Audit Trail	On <i>DataShare Elite</i> tab of <i>Audit Trail</i> screen, print audit trail data.		•	•
Print DataShare Error History	On <i>DataShare Elite</i> tab of <i>Errors</i> screen, print audit trail data.		•	•
Print Sample Results Reports	On <i>Samples</i> tab of <i>Sample Results</i> screen, print Sample Results Reports.		•	•
Print Trend Graph	On <i>Sample Results</i> screen or any of four tabs on <i>Protocol Results</i> screen, print graph of data.		•	•
Print User List	On <i>Users</i> screen, print list of users.	•	•	
Print Validation History	On Validations tab of <i>Protocol Results</i> screen, print results of running Validation protocol.		•	•
Print Verification History	On <i>Verifications</i> tab of <i>Protocol Results</i> screen, print results of running Verification protocol.		•	•
Restore Database	On <i>Database</i> screen, restore file.	•		
Save Trend Graph	While viewing graph of data on <i>Sample Results</i> screen or any of four tabs on <i>Protocol Results</i> screen, save graph data to file.		•	•
Set Default Allowed Export Types	On Reports / Exports tab of Settings screen, specify Enabled Output File Types default settings for users who do not have Customize Allowed Export Types permission.	•	•	
Set Default Display Formats	On <i>General</i> tab of <i>Settings</i> screen, specify <i>Text Format</i> default settings for users who do not have <i>Customize Display Formats</i> permission.		•	•
Set Default Displayed Application Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, specify <i>Application Display</i> default settings for users who do not have <i>Customize Displayed Application Data</i> permission.		•	

Permission Names	Permission Abilities	A	S	0
Set Default Displayed Export Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, specify <i>Export Display</i> default settings for users who do not have <i>Customize Displayed Export Data</i> permission.		•	
Set Default Displayed Report Data	On <i>Displayed Data</i> tab of <i>Settings</i> screen, specify <i>Printed Report Display</i> default settings for users who do not have <i>Customize Displayed Report Data</i> permission.		•	
Set Default Export File Name	On <i>Reports / Exports</i> tab of <i>Settings</i> screen, specify <i>Export</i> <i>File Names</i> default settings for users who do not have <i>Customize Export File Names</i> permission.	•	•	
Set Default Export Paths	On <i>Reports / Exports</i> tab of <i>Settings</i> screen, specify <i>Default</i> <i>Output Folders</i> default settings for users who do not have <i>Customize Export Paths</i> permission.	•	•	
Set Default Print Options	On <i>General</i> tab of <i>Settings</i> screen, specify <i>Print Options</i> default settings for users who do not have <i>Customize Print Options</i> permission.		•	
Set Default Report Graphs	On <i>General</i> tab of <i>Settings</i> screen, specify <i>Default Graph</i> <i>Data</i> default settings for users who do not have <i>Customize</i> <i>Default Report Graphs</i> permission.		•	
Set Default Report Header	On <i>General</i> tab of <i>Settings</i> screen, specify <i>Report Header</i> default settings for users who do not have <i>Customize Report Header</i> permission.		•	
Set Default Time Zone for Imports	On <i>General</i> tab of <i>Settings</i> screen, specify <i>Time Zone for</i> <i>Imported Data</i> default setting for users who do not have <i>Customize Time Zone for Imports</i> permission.	•	•	
Sign Analyzer Audit Trail	On Analyzers tab of Audit Trail screen, sign audit trail entries.		•	•
Sign Calibration Result	On <i>Calibrations</i> tab of <i>Protocol Results</i> screen, sign results of running Calibration protocol.		•	•
Sign DataShare Audit Trail	On <i>DataShare Elite</i> tab of <i>Audit Trail</i> screen, sign audit trail entries.		•	•
Sign Sample Results Reports	On <i>Reports</i> tab of <i>Sample Results</i> screen, sign sample results.		•	•
Sign User Protocol Result	On User Protocols tab of Protocol Results screen, sign results of running user protocol.		•	•
Sign Validation Result	On <i>Validations</i> tab of <i>Protocol Results</i> screen, sign results of running Validation protocol.		•	•
Sign Verification Result	On <i>Verifications</i> tab of <i>Protocol Results</i> screen, sign results of running Verification protocol.		•	•
View Analyzer Audit Trail	View Analyzers tab on Audit Trail screen.		•	•
View Analyzer Error History	View Analyzers tab on Errors screen.		•	•
View Archive File	Display <i>View Archive</i> option on <i>Data History</i> or menu, and select DataShare Elite archive file for viewing.		•	•

Permission Names	Permission Abilities	Α	S	0
View Calibration History	View Calibrations tab on Protocol Results screen.		•	•
View Data History	View Sample Results screen on Data History 🛩 menu; view User Protocols tab of Protocol Results screen.		•	•
View DataShare Audit Trail	View DataShare Elite tab on Audit Trail screen.		•	•
View DataShare Error History	View DataShare Elite tab on Errors screen.		•	•
View Protocol Result Signatures	On four tabs of <i>Protocol Results</i> screen, view signatures.		•	•
View Sample Results Reports	On <i>Reports</i> tab of <i>Sample Results</i> screen, view sample results reports.		٠	•
View Trend Graph	On <i>Sample Results</i> screen or any of four tabs on <i>Protocol Results</i> screen, view graph of data.		•	•
View User List	On <i>Users</i> screen, view full list of users. All users can view their own user entry.	•	•	
View Validation History	View Validations tab on Protocol Results screen.		•	•
View Verification History	View Verifications tab on Protocol Results screen.		٠	•

#### To delete a User Role



**NOTE:** The default User Roles (Administrator, Supervisor, Operator) cannot be deleted.

- 1. Click the *DataGuard* icon and select *User Roles* on the *DataGuard* menu. The *User Roles* screen appears.
- 2. Select the row in the table for the User Role you want to delete, and click the **Delete** button. The *Confirm Delete* dialog box appears.
- **3.** Click the **Delete** button. The User Role is removed from the *User Roles* screen. Note that if a User is assigned to the User Role, an error message will display and the User Role will not be deleted.

### Managing User Accounts

To manage user accounts, navigate to the *Users* screen. From there, you can view and print the list of users; add users; edit user statuses, roles, access levels, and passwords; and print user data. The ability to manage user accounts requires a User ID that has been assigned the *Administrator* Access Level (or another Access Level with the *Add User, Change User Access Level, Change User Password, Change User Role,* and *Change User Status* permissions). For information about roles and permissions, see <u>"Managing User Roles" on page 52</u>.



**NOTE:** When enabled with Active Directory, DataShare Elite allows modification of User Roles, Access Levels, and Statuses. Active Directory manages the user accounts and passwords.

#### To add a user

1. Click the *DataGuard* **b** icon and select *Users* on the *DataGuard* menu.



The Users screen appears.

≣	Data Users	Guard								e	00
	User ID	Status	Role	Access Level	First Name	Middle Initial	Last Name	Last Access Date	Last Failed Login		
~~~	AndreaS	Active	Operator	Global	Andrea		Short	05/17/2024 16:04:23			
	HectorC	Active	Operator	Global	Hector		Cruz	05/17/2024 16:42:28			
Je -	JoshSmith	Active	Administrator	Global	Josh		Smith	05/17/2024 15:28:10			
	KevinJohnson	Active	Supervisor	Global	Kevin		Johnson				
A	MartaL	Active	Supervisor	Global	Marta		Lopez	05/17/2024 15:46:10			
	RajarshiB	Active	Operator	Global	Rajarshi		Bose	05/17/2024 15:36:30			
	SysAdmin	Active	Administrator	Global	Admin		System				
1	TEST01	Active	AllRoles	Global	One		Test	05/17/2024 17:20:45	05/17/2024 15:53:18		
	Add		Edit	t	Print	-					

Figure 3-4: DataGuard Users Screen

Click the Add button. The Create New User dialog box appears. The Error Message
 icon indicates required fields. Hover the mouse pointer over an icon to see the data-entry requirements for the field. Figure 3-5 shows the requirements when DataGuard is enabled without Active Directory. Figure 3-6 on page 63 shows the requirements when DataGuard is enabled with Active Directory.

Create New User					×
User ID:		0			
First Name:		0	Middle Initial:		
Last Name:		0			
Role:	Administrator 👻		Access Level:	Global 👻	
Status:	Active 🔻				
Signature:		٩			
New Password:		0	Set Passw	ord to Expired	
Confirm Password:		0			
				OK Cancel	

Figure 3-5: Create New User Dialog Box (without Active Directory)

Create New User		×
User ID:		
Domain:	GREEN	
First Name:	Middle Initial:	
Last Name:	•	
Role:	Administrator   Access Level: Global	
Status:	Active	
	OK	

Figure 3-6: Create New User Dialog Box (with Active Directory)

- 3. For DataGuard without Active Directory, complete the following:
  - User ID
  - First Name
  - Middle Initial (optional)
  - Last Name



**NOTE:** After saving a User ID, the User ID and user name cannot be modified.

- 4. For DataGuard with Active Directory, complete the following:
  - User ID
  - Domain

DataGuard populates the *First Name, Middle Initial,* and *Last Name* fields with the information in Active Directory.

5. Select a role from the *Role:* list. DataGuard supplies three default roles: *Administrator*, *Operator*, and *Supervisor*. To create and manage roles, see <u>"Managing User Roles"</u> on page 52.

6. Select an access level from the *Access Level:* list. DataGuard supplies five access levels: *Global, Region, Site, Location,* and *Analyzer.* If you select the *Region, Site, Location,* or *Analyzer* access level, an **Edit** button appears below the *Access Level:* field.



**NOTE:** Until you define one or more of the Region, Site, and Location access levels, you must set the new user's access level to Global or Analyzer. For more information about access levels, see <u>"Setting Up Access Levels" on page 69</u>.

7. Click the Edit button. The Select Access Level Items dialog box appears.



Figure 3-7: Select Access Level Items Dialog Box for Analyzers

Select Access Level Items		
Regions		
Available	Selected	
Central - US		
Eastern - US		
Western - US		
	ОК	Cancel

Click the **Edit** button to see available Regions, Sites, Locations, or Analyzers.

- 8. To assign an access level item to the user, select the item in the *Available* pane (press *Ctrl*+select for more than role) and click the right ► arrow to move it to the *Selected* pane.
- 9. To remove an access level item from the *Selected* pane, select it and click the left arrow to move it back to the *Available* pane.

- 10. Repeat Step 8 and Step 9, as needed.
- **11.** When you finish assigning access level items, click the **OK** button.
- **12.** Verify the *Status* list is set to *Active*.
- **13.** For DataGuard without Active Directory, type the password in the *New Password* field. Re-type the password in the *Confirm Password* field.



**NOTE:** The password requirements are configurable. For more information about setting DataGuard password requirements, see <u>"Configuring</u> DataGuard Security Settings" on page 73.

**14.** For DataGuard without Active Directory, check the *Set Password to Expired* option, or leave it unchecked (the default).



**NOTE:** The Set Password to Expired option requires new users to reset their passwords the first time that they log in to DataShare Elite.

15. Click the OK button to save. The new user's account appears on the Users screen.

#### To edit a user account

Use this procedure to edit a user's account by assigning the user a new role, changing the user's access level or password, or assigning the user a new status: *Active*, *Disabled*, or *Retired*.



**NOTE:** Administrators (and any other User Roles with permissions to change user Access Levels, Roles, and/or Statuses) cannot change their own data. This restriction is a safety precaution so that Administrators do not accidentally assign themselves Access Levels, Roles, or Statuses that limit

their ability to manage DataShare Elite users and security.

- 1. Click the *DataGuard* ficon and select *Users* on the *DataGuard* menu. The *Users* screen appears.
- 2. Select the row in the user table for the account you want to edit, and click the Edit button. The *Edit User* dialog box appears (Figure 3-8 on page 66).

Edit User				×
User ID:	JoshSmith			
First Name:	Josh	Middle Initial:		
Last Name:	Smith			
Role:	Administrator •	Access Level:	Global	•
	Active			
Signature:		Q		
New Password:		Set Passwo	ord to Expired	
Confirm Password:				
			ОК	Cancel

Figure 3-8: Edit User Dialog Box (without Active Directory)



**NOTE:** When DataGuard is enabled with Active Directory, the Edit User dialog box includes the Domain field but not the New Password and Confirm Password fields or the Set Password to Expired option.

- 3. Select a new Role or Status, as needed.
- **4.** To change an access level, select it from the *Access Level:* list. If you select the *Region, Site, Location,* or *Analyzer* access level, an **Edit** button appears below the *Access Level:* field.



**NOTE:** For information about setting up the Region, Site, and Location access levels and assigning Analyzers to Locations, see <u>"Setting Up Access Levels" on page 69</u>.

5. Click the Edit button. The Select Access Level Items dialog box appears.

Select Access Level Items			×
Analyzers			
Available	 Selected		
500RL [5261]	500RL [5292]		
DP2 SQL19 [1709075063]	M500 [0259]		
DP2 SQL19 [1709231930]			
M500 [1234]			
	ОК	Cancel	

Figure 3-9: Select Access Level Items Dialog Box for Analyzers

- 6. To assign an access level item to the user, select the item in the *Available* pane (press *Ctrl*+select for more than role) and click the right ► arrow to move it to the *Selected* pane.
- 7. To remove an access level item from the *Selected* pane, select it and click the left arrow to move it back to the *Available* pane.
- 8. Repeat the previous Step 6 and Step 7, as needed.
- 9. When you finish assigning access level items, click the **OK** button.
- **10.** For DataGuard without Active Directory, enter a new password, as needed.
- **11.** Click the **OK** button to save. The edits to the user's account appear on the *Users* screen.

#### To print a list of users or save it as a file

The list contains the accounts of all users. Filtering options are not available.

- 1. Click the *DataGuard* fi icon and select *Users* on the *DataGuard* menu. The *Users* screen appears.
- 2. Click the Print button. The Print Preview dialog box appears.

User ID	Status	Role	Access Level	First Name	Middle Last Name	Last Access Date	Last Failed Login				
AndreaS	Active	Operator	Global	Andrea	Short						
HectorC	Active	Operator	Global	Hector	Cruz						
JoshSmith	Active	Administrator	Global	Josh	Smith						
KevinJohnson	Active	Supervisor	Global	Kevin	Johnson						
MartaL	Active	Supervisor	Global	Marta	Lopez						
RajarshiB	Active	Operator	Global	Rajarshi	Bose						
SysAdmin	Active	Administrator	Global	Admin	System						
TEST01	Active	AllRoles	Global	One	Test	05/17/2024 01:34:27	05/16/2024 08:48:10				
Role					Permissions						
Operator A F F E C T	activate Features, tesult Signatures, listory, Sign Calib listory, Print Verifi 'xport Analyzer An bataShare Audit T 'rend Graph, Prin tesults Reports	ivate Features. Set Default Display Formats, Customize Display Formats, Import Data File, View Archive File, Print Archive Data, Export Archive Data, View Protocol ault Signatures, View Data Hieldony, Export Data Hieldony, Pinn Data Hieldony, Sign User Protocol Result, View Calbraidon Hieldony, Formi Calibration History, Formi Calibration History, Formi Calibration History, Export Data Hieldon, Pinn Calibration History, Pinn Calibration History, Export Data Hieldon, Pinn Calibration History, Export Maiation History, Pinn Vialation History, Pinn Vialation History, Formi Calibration Result, View Analyzer Audit Trail, Day, Print Verification History, Song Verification Result, View Analyzer Error History, Pinn Kanalyzer Error History, Error History, Error History, Error History, Pinn Kanalyzer Error History, Pinn Kanalyzer Error History, Pinn Kanalyzer Error History, Pinn Kanalyzer Error History, Error History, Error History, Error History, Pinn Kanalyzer Error History, Error History, Error History, Pinn Kanalyzer									
Administrator A N S	ctivate Features, lanage Analyzer iet Default Allowe lame, Set Default	Add User, Change Locations, Manage d Export Types, Cu t Time Zone for Imp	User Status, Change DataGuard Settings, stomize Allowed Exp orts, Customize Time	User Password, Cl Archive Database, ort Types, Set Defau Zone for Imports	ange User Access Level, Print U Backup Database, Restore Datat It Export Paths, Customize Expo	Iser List, View User List, Change base, Configure Archive Settings, rt Paths, Set Default Export File	User Role, Manage Roles, Configure Backup Settings, Name, Customize Export File				
Supervisor A U E	ctivate Features, Iser List, Manage Export File Name, Report Graphs, Cl View Calibration H	Set Default Display DataGuard Setting Customize Export F ustomize Default Re listory, Export Calibo	Formats, Customize s, Set Default Allowe File Name, Set Defau port Graphs, View P ation History, Print C on History, Export Ve	Display Formats, In d Export Types, Cut d Print Options, Cut rotocol Result Signa alibration History, S rification History, Pri	nport Data File, View Archive File tomize Allowed Export Types, Se tomize Print Options, Set Defaul tures, View Data History, Export gn Calibration Result, View Valid nt Verification History, Sign Verifin	e, Print Archive Data, Export Arch et Default Export Paths, Customiz t Report Header, Customize Rep Data History, Print Data History, ation History, Export Validation H cation Result, View Analyzer Error	ive Data, Print User List, View ze Export Paths, Set Default ort Header, Set Default Sign User Protocol Result, listory, Print Validation History, or History, Export Analyzer				

Figure 3-10: Print Preview Dialog Box

This view shows the User ID, Status, Role, Access Level, Name, Last Access Date, and Last Failed Login of each user. Additionally, it lists the active Roles and their associated permissions. To view multiple pages, scroll up and down within the Print Preview.

- 3. Click the **Print** button. The Windows *Print* dialog box appears.
- 4. Select a printer and click the **Print** button. The file prints to the specified printer.

To save the print preview as a PDF file, click the **Print** button on the *Print Preview* window and choose a PDF printer option, then click the **Print** button again. The Windows *Save As* window appears. In the *File name:* field, type a file name and click the **Save** button. DataShare Elite saves a PDF file in the specified location.

5. On the *Print Preview* window, click the **Close** button.

## Setting Up Access Levels

When you enable DataGuard, it provides two access levels: *Global* and *Analyzer*. If you assign users the *Global* access level, they have access to data for all Analyzers and Sensors. If you assign users the *Analyzer* access level, they have access to data only for the Analyzers and Sensors that you assign to them. For example, you might assign one user access to data for all Sievers M9 Analyzers and another user access to data for all Sievers CheckPoint Sensors.

In addition, you have the option to set up three additional access levels:

- **Region** The highest level grouping, such as *Eastern U.S., Central U.S.,* and *Western U.S.* Each region consists one or more sites.
- Site The mid-level grouping, such as *New York, Atlanta, Chicago, St. Louis, Boulder,* and *Denver.* Each site consists of one or more locations.
- Location The lowest level grouping, such as *Manufacturing 1, Manufacturing 2, Building A,* and *Building B.*

After you create regions, sites, and locations, you assign locations to the Analyzers and Sensors. When you assign a location you specify a start date: the date on which the Analyzer was placed in service at that location. When you move an Analyzer from one location to another, you create another entry in the Analyzer table with the new location and the new start date (the date on which the Analyzer was placed in service at the new location). Now users with access to the Analyzer at the original location can see all data generated at the original location but no data generated at the new location.

After setting up access levels, you can assign a user any access level and specify which components of the access level the user can access. For example, you could assign one user the *Region* access level and give the user access to all Analyzers at locations within the *Western U.S.* region. You could assign another user the *Region* access level and give the user access to all Analyzers at locations within the user access to all Analyzers at locations within the user access to all Analyzers at locations within the *Central U.S.* and *Eastern U.S.* regions.

## DataGuard: Custom and Default Settings

When DataGuard is enabled, the three tabs on the *Settings* screen (*General, Displayed Data,* and *Reports / Exports*) have both *Custom Options* and *Default Options*. Figure 3-11 shows the top portion of the *General* tab on the *Settings* screen with the two options highlighted.



If DataGuard is not enabled, *Custom Options* and *Default Options* will not be available.



Figure 3-11: Settings Screen: Custom Options and Default Options

**Custom Options** are settings customized to the currently logged-in User ID. The current User Role must have "Customize" permissions activated to change the configuration settings on the *Custom Options* set of tabs (see <u>Table 1, "Permissions and Permission</u> <u>Abilities," on page 56</u>).

For example, to change the displayed application data, the User Role must include the *Customize Displayed Application Data* permission to make changes in the Application Display area (Figure 2-2 on page 25, at a) of the Displayed Data tab

**Default Options** are settings configured for users who do not have "Customize" permissions. These settings can be configured only by those with a User Role that has "Set Default" permissions. Those users that do not have "Customize" permissions will be configured to view, export, and print per the configuration established as the defaults for General, Displayed Data, and Reports/Exports.

#### **Example: Changing default Displayed Data options**

For example, suppose that a user has the Operator User Role, and the Default Options > Displayed Data > Application Display screen appears as follows (note that Rejected Repetitions and Flush Time are not selected):



According to those settings, the Sample Results will display the following types of data:

			Sar	nple Resul		ita Iy	/pes				
Sample Results - Replicate Date/Time	Test Protoc	col 1 Sample Name	Sample Type	Sample Mode	Step #	Rep #	тос	ю	тс	Acid Rate	Oxid Rate
14 Mar 2024 07:52:06		Sample 1	Sample	Autosampler	1	1 of 4	43.6 ppb	6.84 ppb	50.4 ppb	0.5 µL/min	0.5 µL/min
14 Mar 2024 07:52:16						2	44.7 ppb	5.99 ppb	50.7 ppb		

Two options are available to change the displayed application data:

- A user with the *Manage Roles* and *Change User Role* permissions can create a User Role specifically for a user that includes the desired displayed application data settings. See <u>"Managing User Roles" on page 52</u> for more information.
- A user with the Set Default Displayed Application Data permission can change the Default Displayed Data settings for the Operator User Role (which will change it for all users with that role). See <u>"Configuring Displayed Data Settings" on page 25</u> for more information.

When the *Default Displayed Application Data* has been changed to include the new data types, they will have check marks on the *Default Options > Displayed Data > Application Display* screen...



...and the Sample Results data for the User Role that was altered (note that the scroll bar has been moved to the right to show the additional columns):

								_		•	New D	ata Types				
۶	Sample Re	sults Sample Type	Sample Mode	Rej	Rejected	ж	ю	тс	rCond	Temp	tCond	Protocol Name	Analyzer Name	Analyzer Type	Analyzer S/N	Flush Time
A		Unknown	Online	44		41.4 ppb	0.00 ppb	41.4 ppb	24.26 µS/cm	24.7 °C	24.39 µS/cm	OL Test 2	CarolM9	M9	00006	
<u> </u>		Unknown	Online	4478		41.3 ppb	0.00 ppb	41.3 ppb	24.26 µS/cm	24.7 °C	24.40 µS/cm	OL Test 2	CarolM9	M9	00006	360 sec
## Additional information about Settings

Changing Default Options controls the configuration for **other** users who do not have *Custom Options*; they have no effect on what DataShare Elite displays for the user making the changes.

If a DataShare Elite User Role includes permissions to customize one or more (but not all) of the DataShare Elite configuration settings, use the *Custom Options* versions of the three tabs on the *Settings* screen to specify those settings that are permitted to change. Settings that are not permitted to change are visible but inactive. For a User Role that does not have *Customize Options* permission, the tab contains no information. That User Role can view all the configuration settings on the *Default Options* version of the tab, but cannot change them.



**NOTE:** The Default Options have no relationship to the default factory settings that DataShare Elite restores when you click one of the Defaults buttons and then click the **Save** button.

# Configuring DataGuard Security Settings

When DataGuard is enabled without Active Directory, use the *Security Settings* screen to define requirements for DataGuard User IDs and passwords, including preserving the user ID from the last signature, requiring signature comments, specifying the maximum number of signatures per user per protocol, and setting the length of time until passwords expire. Also use the *Security Settings* screen define the number of incorrect login attempts at which DataGuard will change the status of a User ID to Inactive, and the amount of time a user can be inactive before DataGuard times the user out. See Figure 3-12 on page 74.

When DataGuard is enabled with Active Directory, use the *Security Settings* screen to preserve the User ID from the last signature, and require signature comments. See <u>Figure 3-12</u> on <u>page 74</u>.

### To configure security settings

To configure DataGuard User ID, password, and signature requirements:

1. Click the *DataGuard* **a** icon and select *Security Settings* on the *DataGuard* menu. The *Security Settings* screen appears. When DataGuard is enabled without Active Directory, the screen has four areas:



Figure 3-12: Security Settings Screen (without Active Directory)

<b>a -</b> General	<b>b</b> - Signature Workflow			
<b>c -</b> User ID Rules	<b>d -</b> Password Rules			



**NOTE:** When DataGuard is enabled with Active Directory, Password settings are not available.



When DataGuard is enabled with Active Directory, the screen has two areas:



**a** - General **b** - Signature Workflow

#### General area

- **2.** Select (check mark) or de-select (no check mark) each of the following options, as needed. You can edit the value of each option that you select:
  - Auto Logout After (Idle Seconds) Enter the number of seconds (10 to 300) during which a user may remain inactive before DataGuard automatically logs the user out of the system. When the option is selected, the default value is 60.
  - **Expire Password after (Days)** Enter the number of days (1 to 365) during which a password is valid. After the specified number of days, a user must change the password. The default value is *90* days.
  - Lockout User After (Failed Attempts) Enter the number of incorrect password entries (2 to 10) at which DataShare Elite automatically sets the User ID status to *Inactive*. The default value is 3. When the value is set to 3, a user can enter two incorrect passwords and still have another opportunity to enter the correct password. If the user enters a third incorrect password, the User ID is locked out.

DataShare Elite does not remove the lockout after a specified amount of time elapses. If a user is locked out, the Administrator must unlock the user by resetting their Status to Active.

#### Signature Workflow area

- **3.** Select one or more of the following options, as needed:
  - **Preserve User ID From Last Signature** The first time that someone signs a protocol result record after a user starts DataShare Elite and logs in, DataShare Elite puts the User ID of the logged-in user in the *User ID* field on the *Signature Required* dialog box. The next time that someone signs a protocol result record, DataShare Elite puts the User ID of the person who signed the last protocol result record in the *User ID* field. Pre-populating the *User ID* field helps streamline the signing process.
  - **Require Signature Comments** Requires user to type a comment with each electronic signature activity.
- 4. Specify a value for the following options, as needed:
  - **Required Review / Approve Signatures** Enter the number of Review and Approve signatures (1 to 15) required for a protocol. The default value is 1 each.

If DataGuard is enabled with Active Directory, go to Step 8. If DataGuard is enabled without Active Directory, continue to the next step.

#### User ID Rules Area

- **5.** Specify values for the following options, as needed:
  - **Minimum Length** Enter a value for the minimum length (between 2 and 19 characters) of a User ID. The default value is *8*.
  - **Maximum Length** Enter a value for the maximum length (between 4 and 20 characters) of a User ID. The default value is *20*.



**NOTE:** None of the following password settings appear when DataGuard is enabled with Active Directory.

#### Password Rules Area

- 6. Specify values for the following options, as needed:
  - **Minimum Length** Enter a value for the minimum length (between 6 and 150 characters) of a password. The default value is 6. The maximum length of a password is set at 150 characters and cannot be changed.
  - **Prevent Reuse of Last (Passwords)** Specify the number of recent passwords (between 0 and 12) that cannot be reused. The default value is 5. If a user creates password A, and this value is set to 2, then the user cannot make password A their current password again until they have changed their password twice.

## **Required Characters Area**

- 7. Specify values for the following options, as needed:
  - **Upper Case** Enter the minimum number (from 0 to 10) of upper case characters required in a password. The default value is *1*.
  - **Lower Case** Enter the minimum number (from 0 to 10) of lower case characters required in a password. The default value is *0*.
  - **Numbers** Enter the minimum number (from 0 to 10) of numbers required in a password. The default value is *1*.
  - **Special** Enter the minimum number (from 0 to 10) of special characters required in a password. The default value is *0*.
- 8. When you finish specifying security settings, click the **Save** button.



**NOTE:** To restore the factory security settings, click the **Defaults** button. To go back to the previously saved settings, click the **Revert** button (note that the Revert function is available only if you haven't yet saved your changes).

## USING DATASHARE ELITE AFTER DATAGUARD IS ENABLED

This section includes the following instructions:

- <u>"Logging into DataShare Elite"</u>
- <u>"Working with Passwords" on page 79</u>
- <u>"Logging Out of DataShare Elite" on page 81</u>

# Logging into DataShare Elite

After DataGuard is enabled, all users will be required to log in.

## To log in to DataShare Elite

- 1. Open the DataShare Elite application. A message that DataShare Elite is connected appears followed by the *DataShare Elite Login* dialog box.
- 2. Type your User ID in the User ID field.
- 3. Type your password in the *Password* field.
- 4. Click the **OK** button. The screen that opens depends on the privileges associated with the active user shown in the lower left corner.



**NOTE:** If a user reaches the limit on unsuccessful login attempts (see <u>"Configuring DataGuard Security Settings" on page 73</u>), DataGuard will automatically deactivate the User ID until a user with the Change User Status privilege resets the Status of the User ID to Active. DataShare Elite does not ers that they are locked out

inform users that they are locked out.

The screens and options that appear in the DataShare Elite user interface are based on the permissions assigned to your User Role. For example:

- The **Graph** button requires the *View Trend Graph* permission.
- The **Export** button requires the *Export Data History* permission.
- The **Print** button requires the *Print Data History* permission.

For more information about permissions, see <u>"Managing User Roles" on page 52</u>.

Because screens and options that appear in DataShare Elite are based on the permissions assigned to your User Role, you do not need to sign in to perform specific tasks unless you have been assigned permissions to sign the results of calibrations, user protocols, validations, or verifications (see <u>"To sign reports</u> <u>electronically" on page 138</u>).

## Working with Passwords

This section contains information for changing your DataGuard password, or retrieving forgotten or deactivated password.

- <u>"To change your DataGuard password"</u>
- <u>"To obtain a new password" on page 80</u>

#### To change your DataGuard password

Use this procedure to change your current and active password. If DataGuard was enabled with Active Directory, you cannot change your password in DataShare Elite.

- 1. Click the *DataGuard* icon and select *Users* on the *DataGuard* menu. The *Users* screen appears.
- 2. Select the row in the user table for your account, and click the **Edit** button. The *Edit User* dialog box appears.

Edit User		10.22.10 - 7.2 1000 7 07 <del>7</del> 17.20.		×
User ID:	rajarshibose			
First Name:	Rajarshi	Middle Initial:		
Last Name:	Bose			
Role:	Operator 💌	Access Level:	Location	•
Status:	Active 🔻	Edit	Bio Lab	
Signature:		٩		
New Password:		Set Passw	ord to Expired	
Confirm Password:				
			ОК	Cancel

#### Figure 3-14: Edit User Dialog Box for Changing a Password

- 3. Type the new password in the New Password field.
- 4. Re-type the new password in the *Confirm Password* field.
- 5. Click the **OK** button. The *Signature Required* screen appears.

Signature Required			_		×
Signature					
Action:	Change User Passw	ord			
Permission:	Change User Passw	ord			
User ID					_
					0
Password					1
					0
					1
Comments					1
		ОК	Ca	ancel	

Figure 3-15: Edit User Dialog Box for Changing a Password

- 6. Type your old password (not your new password) in the *Password* field.
- **7.** (Optional) In the *Comments* field, type the reason why you are changing your password.
- 8. Click the **OK** button. DataShare Elite changes your password, and the *Users* screen appears again.

#### To obtain a new password

If you forget your password or if you are attempting to log in and your attempts exceed the limit (as set by the Administrator (<u>page 65</u>), contact Technical Support, or your local service provider.



**NOTE:** If DataGuard was enabled with Active Directory, contact your Active Directory administrator if you forget your password or your login attempts exceed the limit.

- 1. Click the **Help** button on the *DataShare Elite Login* dialog box. An information message appears with the *Key* number.
- **2.** Provide the *Key* number to Technical Support or your local service provider. They will supply a "Password of the Day."
- **3.** Sign into DataGuard using this temporary password. DataGuard will then require you to change your password. If needed, see <u>"To change your DataGuard password" on page 79</u>.

# Logging Out of DataShare Elite

Logging out of DataShare Elite after each session prevents a second user from accessing the application under the first user's account, helps preserve the integrity of the audit trail, and minimizes the risk of unauthorized access.

## To log out of DataShare Elite

On any screen (such as *Sample Results* or *Protocol Results*), click the *Exit* **U** icon in the Menu Bar.



The active user is logged out automatically whenever the DataShare Elite application times out.

# **CHAPTER 4: IMPORTING DATA**

This chapter provides information about importing data into DataShare Elite. There are two methods of importing data:

- Exporting data from compatible Analyzers into files, which are then imported into DataShare Elite
- Direct connection from compatible Analyzers and DataPro2 to DataShare Elite

## **Compatible Analyzers and Sensors**

Analyzer/Sensor (Minimum FW/SW)	Supported File Type
Sievers M500 and M500e TOC Analyzers (v1.03 or later)	Data history (.enc) Database backup (.bak)
Sievers M-Series TOC Analyzers (v1.13 or later)	Database archive (.enc)
Sievers CheckPoint and CheckPoint <sup>e</sup> Sensors (v1.05)	Database backup (.bak) Database archive (.enc)
Sievers 900 Series TOC Analyzers (v2.16 or later) (using the DP900RST Utility - see <u>Appendix A.</u> "DP900RST Utility" on page 189 for more information)	Results (.enc)
Sievers 500 RL TOC Analyzers (v2.16 or later)	
DataPro2 software (v1.09 or later)	Database backup (.bak) Database archive (.enc)

## The Data Import Process

DataShare Elite allows you to import a single file—or a batch of multiple files—containing data history, database backups, database archives, error history, and (if DataGuard is enabled) audit trail data from Sievers Analyzers and Sensors. When DataShare Elite is installed on an enterprise system, it provides filter options that eliminate the need to presort files before import. The options allow filtering by:

- Results type (such as *Calibrations* and *Verifications*)
- Product line (such as Sievers M-Series)
- Analyzer serial number

These options filter the files during the import process and ensure that only those files meeting the filter criteria that you define are imported into DataShare Elite.

When DataShare Elite imports data files, it checks for duplicate records by comparing the Analyzer type, serial number, and timestamp of each record with existing data (see <u>"How</u> <u>DataShare Elite Imports, Stores, and Displays Timestamp Values" on page 86</u> for timestamp information). When DataShare Elite finds duplicates, it ignores them. The *Import Results* dialog box indicates that records from the files have been added to the DataShare Elite database, updated in the database, and/or not added to the database because they are duplicates of records already in the database or for other reasons. DataShare Elite keeps track of source of records, so input from backup files overrides less comprehensive data.

Once you import data into DataShare Elite, it remains in DataShare Elite until you either archive the data or restore a backup file. You cannot remove individual records from DataShare Elite.

## To manually import data files into DataShare Elite

#### Step 1: Export files from Analyzers

Data files are first exported from an Analyzer in an encrypted (\*.enc) file format (or a \*.csv file format from the Sensor) and saved to a USB memory device. The file(s) can also be sent directly to a computer through an Ethernet connection (*Sievers M500 TOC Analyzers, Sievers M-Series TOC Analyzers,* and *Sievers CheckPoint* and *CheckPoint*<sup>e</sup> *Sensors*) or a serial connection (*Sievers 900 Series* and *Sievers 500 RL TOC Analyzers*). Refer to the Analyzer's or Sensor's Operation and Maintenance Manual for instructions that explain how to export data from the Analyzer or Sensor.



**NOTE:** USB devices should hold between 4GB and 2TB of data and be formatted with the FAT32 file system (NTFS devices should be reformatted to FAT32).

#### Step 2: Manually import data from files into DataShare Elite

1. Click the *Data History* محمه icon and select *Import...* on the *Data History* menu. The *Data Import* dialog box for files appears.

■ Data Import		×
File Type	Analyzer Type Analyzer S/N File	Import Data Types
		🖌 All
		✓ Results
		✓ Calibrations
		✓ Verifications
		✓ Validations
		✓ Errors
		🖌 Audit Trail
Select Files	Remove Files	
		Import Cancel

Figure 4-1: Data Import Dialog Box

2. In the *Import Data Types* area to the right, select (check mark) or de-select (no check mark) each option to include for importing into DataShare Elite. To set all the *Import Data Types* options simultaneously, select or de-select the *All* option.



**NOTE:** Any files selected on the computer that do not meet the defined import types will not be imported into DataShare Elite.

**3.** Click the **Select Files...** button. The Windows *Select Files to Import* window appears. Navigate to the folder containing the files to be imported, select the file or files (to select a group of files, press **Shift** + select or **Ctrl** + select) and click **Open**.

ect Files to Import → ✓ ↑ 📕 - M	9 v2.00 → HistData M9 v2-00 OnlineGrabAutosam	pler 🗸 🖑	Search HistData M9	× v2-00 Onli 🔎	port Data Type
organize - New fold	er			- 🔳 🕗	J All
OneDrive This PC 3 3D Objects Dosktop Documents Downloads Music Pictures Videos Local Disk (C:)	Name HistData_00006_27Aug2021_002.csv HistData_00006_27Aug2021_002.enc	Date modified 3/21/2022 9:03 AM 3/21/2022 9:03 AM	Type CSV File ENC File	Size 28 KB 29 KB	Results       Calibrations       Verifications       Validations       Errors       Audit Trail
File r	name: SP_Cond_Cal_1234_20210622_110002.enc	v	Import Open	Cancel	

 On the Data Import dialog, select the files to import (to select a group of files, press Shift + select or Ctrl + select). Only those data types selected on the *Import Data Types* section will import into DataShare Elite.

🔳 Data Import File Type Analyzer Type Analyzer S/N File Import Data Types 🖌 All M9 Data History HistData\_00006\_27Aug2021\_002.end M9 0006 M9 Audit M9 0006 Audit\_00006\_04Jun2021\_000.enc ✓ Results M500 Single File M500 1234 mple\_Cond\_Linearity\_1234\_20210622\_111119.enc ✓ Calibrations ✓ Verifications ✓ Validations ✓ Errors 🖌 Audit Trail Import

To remove a file, select the file and click Remove Files

**5.** Click the **Import** button. Status bars appear showing the progress of the file import process.

Import Results							>
Import Results							
Source	Added	Updated	Duplicates	Not Imported	Details		
HistData_00006_27Aug2021_002.enc	$\checkmark$						
Audit_00006_04Jun2021_000.enc	$\checkmark$						
Sample_Cond_Linearity_1234_20210622_111119.enc	$\checkmark$						
					1	OK	

6. When the import is completed, the *Import Results* dialog box appears.

When you import data files, DataShare Elite checks for duplicate records by looking at the Analyzer type, serial number, and timestamp of each record. When DataShare Elite finds duplicates, it ignores them. The *Import Results* dialog box indicates that records that have been added to the DataShare Elite database, updated in the database, and/or not imported into the database for various reasons. For example, the records might be duplicates of records already in the database. If your import includes only duplicate records, DataShare Elite will put check marks in the *Duplicates* and *Not Imported* columns and add *Contains only duplicate records* in the *Details* column.

7. Click the **OK** button to return to the screen displayed before import.

# How DataShare Elite Imports, Stores, and Displays Timestamp Values

DataShare Elite lets you change the time stamp of imported data at the time of import, enabling you to import data from Analyzers in different time zones and define the locations of those Analyzers.

When you import data into DataShare Elite, you can use your current default time zone selected during DataShare Elite setup. For more information, see <u>"To specify the default time zone for imported data" on page 24.</u> You also have the option of selecting the time zone associated with the Analyzer that generated the data (see this option in <u>"To manually import data files into DataShare Elite" on page 83</u>).



**NOTE:** If data is imported with an incorrect time zone, it can be removed only by archiving the database, beginning with the date that includes the newly imported data. Please note that for data integrity, archiving cannot focus on a specific set of data—this archive will include ALL data in the database.

Once data is imported into DataShare Elite, the import file is stored with a Coordinated Universal Time (UTC) time stamp. Users who view this data will see the time stamp in their local time, which may result in different hours or days being displayed for the same set of data (Figure 4-2).

For example, if an Analyzer in Denver (Mountain Standard Time) exported its data to a local computer at 12:16 a.m. on 10 December, a User in Pacific Standard Time would see the time of that event as 11:16 p.m. on 9 December (circled in red in Figure 4-2). The time of the reading is unchanged, but it displays differently depending on the viewer's location.

Because you specify one time zone per set of imported files, you should group the sets of files that you import so that all the files in the group are from Analyzers located within the same time zone.



**NOTE:** DataShare Elite automatically adjusts all timestamps for Daylight Savings Time, where applicable.

Mountain Standard Time		Pacific Standard Time				
08 Nov 2021 15:27:02	1003	Edit Auto Import Settings	08 Nov 2021 14:27:02	1003	Edit Auto Import Settings	
08 Nov 2021 15:20:04	608	Auto Import Device Not Found	08 Nov 2021 14:20:04	603	Auto Import Device Not Found	
08 Nov 2021 15:10:49	1003	Edit Auto Import Settings	08 Nov 2021 14:10:49	1003	Edit Auto Import Settings	
08 Nov 2021 14:31:13	502	Export Calibration Results	08 Nov 2021 13:31:13	502	Export Calibration Results	
08 Nov 2021 14:27:52	600	Import Data Files	08 Nov 2021 13:27:52	600	Import Data Files	
alibrations			Calibrations			
Timestamp	Prote	ocol Name	Timestamp	Prot	ocol Name	
10 Dec 2019 17:26:41	Mult	tipoint Calibration	10 Dec 2019 16:26:4	16:26:41 Multipoint Calibration		
10 Dec 2019 15:09:57	Mult	tipoint Calibration	10 Dec 2019 14:09:5	7 Mul	tipoint Calibration	
10 Dec 2019 13:12:02	Mult	tipoint Calibration	10 Dec 2019 12:12:0	2 Mul	Multipoint Calibration	
10 Dec 2019 13:11:46	Mult	tipoint Calibration	10 Dec 2019 12:11:4	5 Mul	tipoint Calibration	
10 Dec 2019 13:11:34	Mult	tipoint Calibration	10 Dec 2019 12:11:3	4 Mul	tipoint Calibration	
10 Dec 2019 01:11:46	50 p	opm Single Point Calibration	10 Dec 2019 00:11:4	10 Dec 2019 00:11:46 50 ppm Single Poir		
10 Dec 2019 00:16:54	50 p	opm Single Point Calibration	09 Dec 2019 23:16:5	4 50 p	opm Single Point Calibration	
09 Dec 2019 23:58:10	50 p	opm Single Point Calibration	09 Dec 2019 22:58:10	) 50 p	opm Single Point Calibration	
09 Dec 2019 23:57:53	50 p	pm Single Point Calibration	09 Dec 2019 22:57:53 50 ppm Single f		opm Single Point Calibration	
09 Dec 2019 23:57:42 50 ppm Single Point Calibration		09 Dec 2019 22:57:42 50 ppm Single Poir		opm Single Point Calibration		

Figure 4-2: Import time stamps in different time zones

When the data is exported, DataShare Elite will export the data as it displays on the screen/time zone of the user doing the exporting. As such, the time stamp of the data might vary (Figure 4-3).

2	A	В		В	С	D
9	Protocol Name	Multipoint Calibration	9	Multipoint Calibration		
10	Start Date	10 Dec 2019 17:26:41	10	10 Dec 2019 16:26:41		
11	End Date	10 Dec 2019 19:44:08	11	10 Dec 2019 18:44:08		
12	Protocol Type	Calibration	12	Calibration		
13	Operator Name		13			
14	Comments		14			
15	Performed By Certified FSE		15			
16			16			
17	Sample Name	Lot #	s 17	Lot #	Sample Type	Sample Mode
18	Rw Blank		E 18		Blank	
19	Rep #	Timestamp	1 19	Timestamp	TOC (ppb)	IC (ppb)
20	3	10 Dec 2019 17:36:41	< 20	10 Dec 2019 16:36:41	< 4.00	14.
21	4	10 Dec 2019 17:38:41	21	10 Dec 2019 16:38:41	9	14.
22	5	10 Dec 2019 17:40:41	22	10 Dec 2019 16:40:41	6	14.
-						

Figure 4-3: Export time stamps in different time zones

M500 Analyzers automatically store imported data in UTC, regardless of what time zone the user importing the data is in. The UTC time stamp is then adjusted to the local time zone of any user viewing the data.

Once data is imported, the user has the option of selecting a location for the analyzer on the Management > Analyzers tab. For more information, see <u>"To assign Analyzers to locations" on page 40.</u>

#### To import data from connected Analyzers and DataPro2

To import data into DataShare Elite directly from Analyzers and other remote sources, you must first establish connections between the data sources and DataShare Elite. The compatible source types are:

Analyzer/Sensor (Minimum FW/SW)	Minimum FW/SW
Sievers M500 and M500e TOC Analyzers	v1.03 or later
Sievers M-Series TOC Analyzers	v2.02 or later
DataPro2 software (see <u>"Handling DataPro2 data" on page 92</u> for more information on this data source)	v2.02 or later

Once suitable connections are established, you can either manually or automatically import data.

#### **Step 1: Select Remote Data Sources**

1. Click the *Management* icon and select *Remote Data Sources* on the *Management* menu. The *Remote Data Sources* screen appears:

listory ~~~	Remote Data Sources	Remote Data Sources	Remote Data Sources	Remote Data Sources
	Add	Add Remove Test Cor	Add Remove Test Connection	Add Remove Test Connection
jement 🥜	Source Name Source	Source Name Source Type Serial Number	Source Name Source Type Serial Number IP Address	Source Name Source Type Serial Number IP Address
5	Software Lab 1	Software Lab 1 M9 10218	Software Lab 1 M9 10218 192.168.10.60	Software Lab 1 M9 10218 192.168.10.60
ports 2				
Data Sources e)				
ns				
uard A				
i				
ப				

Figure 4-4: Remote Data Sources Screen



2. Click the Add button. The Remote Data Source dialog box appears:

≣	Anagement Remote Data Sour	ces					008
~	Remote Data Sources						
\$	Add	68	R	emove Test	Connection Import Data		
1	Source Name	Source Type	Serial Number	IP Address	Connection Verified Last Import Date	Time Zone	
ê	Software Lab 1	M9	10218	E Temote Data Source		×	
i				Course Manage			
ወ				Source Name:			
				source rype:	M9		
				Serial Number:	MSPe MS310C	•	
				Source IP Address:	M500e DP2 50L19	0	
					092 50.22		
					Αφρ	y Cancel	
							Save Revert

- 3. Enter the source's identifying information in the appropriate fields in the dialog box:
  - A. Type a source name in the Source Name field
  - B. Select the source type from the Source Type drop-down list.
  - C. Type the serial number of the Analyzer in the *Serial Number* field. The serial number is a four- or five-digit number derived from the last four or five digits of the serial number label. For example, if the serial number label reads *23118862* the serial number to enter in the field is *8862*.



**NOTE:** If DP2 SQL 19 or DP2 SQL 22 were selected as the Source Type, a dummy serial number will auto-populate this field, and no action is required

D. Type the IP address of the source in the Source IP Address field.



**NOTE:** If the source is DataPro2 on the same computer as DataShare Elite, type Localhost. Alternatively, enter 127.0.0.1 as the IP address.

E. If the source Analyzer is an M9, M9e, or M5310C, you will be asked to select a time zone.

Remote Data Source		
Source Name:	Software Lab 1	
Source Type:	М9	•
Serial Number:	10218	
Source IP Address:	192.168.10.60	
Timezone:		-
Timezone:	(UTC-12:00) International Date Line West	•
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11	•
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands	•
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-10:00) Hawaii	•
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-10:00) Hawaii (UTC-0:00) Marquesas Islands	-
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-10:00) Hawaii (UTC-09:30) Marguesas Islands (UTC-09:00) Alaska	-
Timezone:	UTC-12:00 International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-00:930) Marquesas Islands (UTC-09:30) Marquesas Islands (UTC-09:00) Alaska (UTC-09:00) Coordinated Universal Time-09	
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-0:00) Hawaii (UTC-09:00) Marquesas Islands (UTC-09:00) Alaska (UTC-09:00) Coordinated Universal Time-09 (UTC-08:00) Baja California	
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Havaii (UTC-09:30) Marquesas Islands (UTC-09:30) Makaka (UTC-09:00) Jakaka (UTC-09:00) Coordinated Universal Time-09 (UTC-09:00) Coordinated Universal Time-08	•
Timezone:	(UTC-12:00) International Date Line West           (UTC-11:00) Coordinated Universal Time-11           (UTC-10:00) Aleutian Islands           (UTC-10:00) Havaii           (UTC-0:93:0) Marquesas Islands           (UTC-0:93:00) Coordinated Universal Time-09           (UTC-0:80:0) Coordinated Universal Time-09           (UTC-0:80:0) Coordinated Universal Time-08           (UTC-0:80:0) Pacific Time (US & Canada)	•
Timezone:	(UTC-12:00) International Date Line West (UTC-11:00) Coordinated Universal Time-11 (UTC-10:00) Aleutian Islands (UTC-09:00) Hawaii (UTC-09:00) Alaska (UTC-09:00) Coordinated Universal Time-09 (UTC-08:00) Coordinated Universal Time-08 (UTC-08:00) Coordinated Universal Time-08 (UTC-08:00) Coordinated Universal Time-08 (UTC-08:00) Pacific Time (US & Canada) (UTC-07:00) Arizona	-

F. When you have completed all fields, click the **Apply** button. The new remote source appears on the Remote Data Sources list, with the Connection Verified column reading "False":

≣	۶	Management Remote Data Sour	rces							8
ممم		Remote Data Sources								_
s.		Add	Edit	Rem	nove Test Connec	ction Imp	ort Data			
·		Source Name	Source Type	Serial Number	IP Address	Connection Verified	Last Import Date	Time Zone		
8		Software Lab 1	M9	10218	192.168.10.60	False				
i										
Ċ										
									Save Revert	

Figure 4-5: Unverified Remote Source

- 4. Click the Test Connection button to verify connectivity between DataShare Elite and the remote source. A Connection Test dialog box will display the result of the test. If successful, click the OK button to continue. If unsuccessful, review the IP address you entered or contact your IT department for assistance.
- 5. Click the **Save** button to save the connection data and change the Connection Verified status of the new remote source to *True*.

6. Click the **Import Data** button to import existing data from the remote source into DataShare Elite. The *Import Results* dialog box appears, showing the data (if any) that was imported. Click the **OK** button to continue.

≣	8	Management Remote Data Sour	rces									
ممهم		Remote Data Sources										
<u>s</u> e		Add	Edit	Rer	nove Test	Connection	ı İmp	ort Data				
		Source Name	Source Type	Serial Number	IP Address	Co	nnection Verified	Last Import Date		Time Zone		
8		Software Lab 1	M9	10218	192.168.10.60		True					
				Import Res	ults					×		
ĺ				Import I	Results	Added	Undeted Due	inter Net Imported	Details			
(I)				M9 [10218]	1	Audeu	opuated Dup	√	Contained no n	new records		
$\sim$												
										ок		
											Save	Revert

7. Repeat steps 2–6 for additional Analyzers or other remote data sources.

#### Handling DataPro2 data

DataShare Elite is compatible with DataPro2 using:

- SQL Server 2019 (select **DP2 SQL 19** as the Source Type)
- SQL Server 2022 (select **DP2 SQL 22** as the Source Type)

When selecting one of the two DataPro2 Source Types:

- The Serial Number field is automatically populated with a systemgenerated number.
- If DataPro2 resides on the same computer as DataShare Elite, enter localhost into the *IP Address* field.

#### Step 2: Manually import the first data set

After setting up the remote data sources, it is recommended that you manually import the first data set from each source. The first importation of data from an Analyzer (depending on the size of the file) could take up to two hours. Manually importing the data allows you to schedule this task at a time that it does not conflict with normal operations. Additionally, it reduces the time of the first automatic import (described in Step 3), which will only need to retrieve new data generated since the manual import.

- 1. Click the *Management* icon and select *Remote Data Sources*.
- 2. Select the Analyzer from which to import the data.
- Click the Import Data button.

#### Step 3: Schedule automatic imports

To set up a schedule for the automatic import of data:

1. Click the *Management icon* and select *Auto Imports* on the *Management* menu. The Auto Imports screen appears (Figure 4-6). This screen has two sections: Import Scheduling (at a), and Remote Data Sources (at b).



Figure 4-6: The Auto Imports Screen

a - Import Scheduling **b** - Remote Data Sources

- 2. In the Import Scheduling area, click the check box next to Auto Import Enabled.
- **3.** Enter a value into the *Import Every (Minutes)* field to set the time between auto imports, from 2–60 minutes.
- 4. In the *Start On* field, specify a date to begin performing automatic imports.

To specify a date, you can:

- Type the date in the Start Date field.
- Select the date by clicking the *Calendar* 15 icon next to the date field.

If the calendar displays the month and year you want, click the day you want.

Use the **Previous and Next buttons to navigate to the month and year, then click the day you want.** 

- 5. Specify the start time for auto imports by typing it in the *Run At* field.
- 6. In the *Remote Data Sources* area, click the **Add** button. The Remote Data Source window appears, listing the Analyzers and other data sources currently available to DataShare Elite (Figure 4-7):

≣	Management Auto Imports							
~~~ *	Import Scheduling Last Auto Import 05/08/2024 17:07:59	Remote Data Sor	Remo	ove Te	st Connection			
8 i	Auto Import Enabled Import Every (Minutes) 2	Remote Data Source	build type		>	×		
<u>ل</u>	Start On (current PC location date) S/8/2024 Run At (current PC location time) 16:10	Source Name Software Lab 1 Local DP2	Source Type M9 DP2 SQL19	Serial Number 10218 715209447	IP Address 192.168.10.60 Localhost			
	[				Add Cancel			
							Save	Revert

Figure 4-7: Remote Data Sources available for auto import

- 7. Select a source from the list and click the **Add** button.
- 8. Click **Test Connection** to verify that the source is connected.

- **9.** Repeat steps 6–8 for additional sources to be included in the auto import. To remove unwanted sources, highlight the appropriate row and click the **Remove** button.
- **10.** Click the **Save** button to complete auto import setup. Click the **Revert** button to undo your progress and return to the start.



**NOTE:** During automatic import, DataShare Elite checks existing data for duplicate records, and is configured to look only for incremental results collected since the last import.

### To refresh DataShare Elite with updated data from the database

This option allows you to query the DataShare Elite database and update the DataShare Elite application with any data added to the database after you started the application or made a previous query.

1. Click the *Help* **1** icon and select *Refresh All Data* on the *Help* menu. The *Refresh Compete* dialog box appears.



2. Click the **OK** button to return to the screen displayed before the data refresh.

## **Displaying Imported Data in DataShare Elite**

After importing the data history files, database back-up files, and/or database archive files that have been exported from Analyzers, DataShare Elite displays sample results on the *Sample Results* screen and results from user-defined protocols and system protocols (Calibrations, Verifications, and Validations) on the four tabs of the *Protocol Results* screen. For more information, see <u>"Working with Results Data" on page 96</u>

When error history data is included in the imported files, DataShare Elite displays the data on the two tabs of the *Errors* screen. Click the *Management* icon and select *Errors* on the *Management* menu. For more information, see <u>"Working with Data about Errors" on page 177</u>

3. When DataGuard is enabled in DataShare Elite, audit trail history data appears on the two tabs of the *Audit Trail* screen. Click the *DataGuard* icon and select *Audit Trail* on the *DataGuard* menu. For more information, see <u>"Working with the Audit Trail</u> (DataGuard Only)" on page 152.

# CHAPTER 5: WORKING WITH RESULTS DATA

This chapter contains information about working with the results of sampling procedures and the results of both user-defined protocols and system protocols. For example, you can view results data in tabular or graphical format, and you can export or print the data. You can also create, review, and approve reports based on the results or protocol data.

Before you work with results data in the DataShare Elite application, you must import it from DataShare Elite-compatible Sievers TOC Analyzers. For more information, refer to <u>Chapter 4:</u> <u>Importing Data on page 82</u>.

# Overview

After you import data into DataShare Elite, the application displays the results of your sampling procedures on the *Sample Results* screen and the results of running protocols on the four tabs of the *Protocol Results* screen:

- User Protocols
- Calibrations
- Verifications
- Validations

You can view the data in the default table format or an optional graphical format.

To search for specific results data in large databases, you can filter the data to smaller groups of records sorted by a category or categories. DataShare Elite also provides a view for comparing the results between two or more specified Analyzers or Sensors. (For more information, see <u>"To compare sample results between Analyzers / Sensors" on page 118.</u>)

You can print data and export data files from the *Sample Results* screen, the four tabs on the *Protocol Results* screen, and the option graph window.

If DataGuard has been enabled, you can review and sign protocol results.

This chapter includes information and instructions for the following:

- <u>"Viewing Results Data" on page 97</u>
- <u>"Filtering Results Data" on page 104</u>
- <u>"Graphing Results Data" on page 110</u>
- <u>"Printing and Exporting Results Data" on page 125</u>
- <u>"Creating a Custom Report" on page 135</u>
- <u>"Working with Electronic Signatures" on page 137</u>

# VIEWING RESULTS DATA

On the *Sample Results* screen and on the four tabs of the *Protocol Results* screen, you can view results data in the active DataShare Elite database. You can also review results data from archive files that you load into the DataShare Elite application for viewing purposes only. Refer to these topics:

- <u>"The Sample Results Screen"</u>
- <u>"The Protocol Results Screen" on page 100</u>
- <u>"Viewing Archived Data" on page 102</u>

# The Sample Results Screen

To display the *Sample Results* screen, click the *Data History* icon and select *Sample Results* menu option. This screen has two tabs: *Samples* and *Reports*. Figure 5-1 shows the *Sample Results* screen with the *Samples* tab active.

Replicate Date/Time	Sample Name	Sample Type	Sample Mode	Rep #	тос	ю	тс	rCond	Temp	tCond	Protocol Name	Analyzer Name	Analyzer Type A
02 Mar 2022 13:48:55	Sample 01	Sample	Grab	4	120 ppb	75.7 ppb	196 ppb	1.301 uS/cm	25.0 °C	1.354 uS/cm	Grab 01		M500
02 Mar 2022 13:45:55	Sample 01	Sample	Grab	3	126 ppb	75.6 ppb	202 ppb	1.299 µS/cm	25.0 °C	1.352 µS/cm	Grab 01		M500
02 Mar 2022 13:42:55	Sample 01	Sample	Grab	2	125 ppb	73.8 ppb	199 ppb	1.300 µS/cm	25.0 °C	1.353 µS/cm	Grab 01		M500
02 Mar 2022 13:11:00	Sample 1	Sample	Averaged	1	397 ppb	113 ppb	510 ppb	54.61 µS/cm	25.0 °C	54.61 µS/cm			M500
02 Mar 2022 12:39:05	Sample 1	Sample	Averaged	1	411 ppb	123 ppb	534 ppb	53.44 µS/cm	25.0 °C	53.44 µS/cm			M500
02 Mar 2022 12:36:05	Sample 1	Sample	Averaged	1	418 ppb	126 ppb	544 ppb	54.35 µS/cm	25.0 °C	54.35 µS/cm			M500
02 Mar 2022 12:33:05	Sample 1	Sample	Averaged	1	427 ppb	126 ppb	553 ppb	52.55 µS/cm	25.0 °C	52.55 µS/cm			M500
02 Mar 2022 12:30:05	Sample 1	Sample	Averaged	1	455 ppb	129 ppb	584 ppb	52.75 µS/cm	25.0 °C	52.75 µS/cm			M500
02 Mar 2022 12:27:06	Sample 1	Sample	Averaged	1	499 ppb	129 ppb	628 ppb	58.88 µS/cm	25.0 °C	58.88 µS/cm			M500
02 Mar 2022 12:24:05	Sample 1	Sample	Averaged	1	534 ppb	138 ppb	672 ppb	56.66 µS/cm	25.0 °C	56.66 µS/cm			M500
02 Mar 2022 12:21:05	Sample 1	Sample	Averaged	1	604 ppb	144 ppb	748 ppb	54.01 µS/cm	25.0 °C	54.01 µS/cm			M500
02 Mar 2022 12:18:05	Sample 1	Sample	Averaged	1	602 ppb	141 ppb	743 ppb	52.69 µS/cm	25.0 °C	52.69 µS/cm			M500
02 Mar 2022 12:15:05	Sample 1	Sample	Averaged	1	578 ppb	132 ppb	710 ppb	58.79 µS/cm	25.0 °C	58.79 µS/cm			M500
02 Mar 2022 12:12:06	Sample 1	Sample	Averaged	1	527 ppb	128 ppb	655 ppb	58.39 µS/cm	25.0 °C	58.39 µS/cm			M500
02 Mar 2022 12:11:00	Sample 1	Sample	Averaged	1	413 ppb	118 ppb	531 ppb	53.93 µS/cm	25.0 °C	53.93 µS/cm			M500
02 Mar 2022 11:41:00	Sample 1	Sample	Averaged	1	387 ppb	106 ppb	493 ppb	54.27 µS/cm	25.0 °C	54.27 µS/cm			M500
02 Mar 2022 11:04:00	Sample 1	Sample	Timed	1	383 ppb	109 ppb	492 ppb	51.81 µS/cm	25.0 °C	51.81 µS/cm			M500
02 Mar 2022 10:34:00	Sample 1	Sample	Timed	1	370 ppb	109 ppb	479 ppb	54.50 µS/cm	25.0 °C	54.50 µS/cm			M500
02 Mar 2022 10:04:00	Sample 1	Sample	Timed	1	371 ppb	122 ppb	493 ppb	53.31 µS/cm	25.0 °C	53.31 µS/cm			M500
02 Mar 2022 09:27:07	Sample 1	Sample	Online	1	1.51 ppb	0.34 ppb	1.85 ppb	0.576 µS/cm	26.3 °C	0.586 µS/cm			M500

# Column headings—click applicable columns to sort ascending/descending

Figure 5-1: Sample Results Screen - Samples

The *Samples* tab displays a table of records. Three of the column headings always appear: *Timestamp, Sample Name,* and *Rep #.* The other column headings (for example:

Sample Type, TOC, IC, and TC) are set by selecting options in the Application Display area of the Displayed Data tab on the Settings screen. For more information, see <u>"To configure the data displayed in the DataShare Elite application" on page 26</u>

DataShare Elite loads sample results into the display area 100 records at a time. Each set of 100 records is a page. Use the vertical scroll bar to navigate through the records on a page, and drag the horizontal scroll bar to see additional columns.

To navigate through the pages, do one of the following:

- Click the Next **>** button or the Previous **<** button.
- Type a number in the page number field and press Enter.

You can sort the data in ascending or descending order by clicking a column heading, such as *Timestamp, Sample Name, Sample Type, Protocol Name, Analyzer Type,* and *Analyzer S/N*. You cannot sort the data by *Rep* # or results data type (*TOC, IC, TC, rCond, Temp, tCond*).

To limit the number of records displayed on the *Sample Results* screen, click the *Filter* icon to filter the data by specific categories. Refer to <u>Filtering Results Data on page 104</u> for instructions.

The *Reports* tab of the Sample Results screen is split into two sections: *Reports* and *Sample Results* (Figure 5-2). The reports are listed in the top section, and the corresponding sample results for the selected report are displayed in the bottom section.

	ممم <b>Data Hist</b> e Sample Res	ory ults															
~~	Samples Repo	orts															¥
×	Reports Timestamp	Report Name	Samples	Create	ed By		Reviewed App	proved Signa	itures				٦				
8	05/17/2024 13:01:42	Sample_Results_Report_2024-05-	17 73	One T	fest												
」 し	İ																
	l												J				
				_							_		J				_
	Graph	Export_	Print									Review.	J	Signature	5	< <u>1</u> /1	•
	Graph Sample Results - Replicate Date/Time	Export_ Sample_Results_Report_2024-05-13 Sample Name	Print Sample Type	Rep #	Rejected	тос	к	тс	rCond	Res	Temp	Review	tRes	Signature Sample Mode	5 Protocol Name		► • An
	Graph Sample Results - Replicate Date/Time 04/30/2019 07:00:39	Export Sample, Results, Report, 2024-05-11 Sample Name Sample	Print Sample Type Sample	<b>Rep #</b> 37	Rejected	<b>ТОС</b> 31.4 ppb	IC 62.8 ppb	<b>ТС</b> 94.2 ppb	<b>rCond</b> 0.618 µS/cm	Res	<b>Temp</b> 25.6 °C	Review tCond 0.610 µ5/cm	tRes	Signature Sample Mode	S Protocol Name	< <u>1</u> /1	An
	Graph Sample Results - Replicate Date/Time 04/30/2019 07:00:39 04/30/2019 06:58:39	Export Sample, Results, Report, 2024-05-17 Sample Sample Sample	Print Sample Type Sample Sample	Rep # 37 36	Rejected	<b>TOC</b> 31.4 ppb 32.3 ppb	IC 62.8 ppb 62.5 ppb	<b>TC</b> 94.2 ppb 94.8 ppb	rCond 0.618 μS/cm 0.614 μS/cm	Res	Temp 25.6 °C 25.6 °C	<u>Review</u> tCond 0.610 μS/cm 0.604 μS/cm	tRes	Signature Sample Mode	S Protocol Name	< <u>1</u> /1	An
	Graph	Export_ Sample, Results, Report, 2024-03-17 Sample Sample Sample Sample	Print_ Sample Type Sample Sample Sample	Rep # 37 36 35	Rejected	<b>TOC</b> 31.4 ppb 32.3 ppb 32.8 ppb	E 62.8 ppb 62.5 ppb 61.9 ppb	<b>TC</b> 94.2 ppb 94.8 ppb 94.7 ppb	rCond 0.618 μS/cm 0.614 μS/cm 0.612 μS/cm	Res	Temp 25.6 °C 25.6 °C 25.6 °C	<b>Review</b> <b>tCond</b> 0.610 μS/cm 0.604 μS/cm 0.603 μS/cm	tRes	Signature Sample Mode	S Protocol Name	< <u>1</u> /1	An
	Graph           Sample Results - Replicate Date/Time           04/30/2019 07:00:19           04/30/2019 06:58:39           04/30/2019 06:58:39           04/30/2019 06:58:39	Export_ Sample, Peort, 2024-03-17 Sample Sample Sample Sample Sample	Print Sample Type Sample Sample Sample	Rep # 37 36 35 34	Rejected	TOC 31.4 ppb 32.3 ppb 32.8 ppb 33.3 ppb	IC 62.8 ppb 62.5 ppb 61.9 ppb 61.0 ppb	TC 94.2 ppb 94.8 ppb 94.7 ppb 94.3 ppb	rCond 0.618 µS/cm 0.614 µS/cm 0.612 µS/cm 0.608 µS/cm	Res	<b>Temp</b> 25.6 °C 25.6 °C 25.6 °C 25.7 °C	<b>Review.</b> <b>tCond</b> 0.610 μS/cm 0.604 μS/cm 0.603 μS/cm 0.599 μS/cm	tRes	Signature Sample Mode	S Protocol Name	< 1/1	An
	Graph           Sample Results -           Replaces Dat/Time           04/30/2019 0658.39           04/30/2019 0658.39           04/30/2019 0658.39           04/30/2019 0658.39           04/30/2019 0658.39	Export. Sample Results, Report, 2024 05-13 Sample Sample Sample Sample Sample Sample	Print Sample Type Sample Sample Sample Sample	Rep // 37 36 35 34 33	Rejected	TOC 31.4 ppb 32.3 ppb 32.8 ppb 33.3 ppb 30.6 ppb	IC 62.8 ppb 62.5 ppb 61.9 ppb 61.0 ppb 60.5 ppb	TC 94.2 ppb 94.8 ppb 94.7 ppb 94.3 ppb 91.1 ppb	rCond 0.618 µS/cm 0.614 µS/cm 0.612 µS/cm 0.608 µS/cm 0.608 µS/cm	Res	Temp 25.6 °C 25.6 °C 25.6 °C 25.7 °C 25.7 °C 25.6 °C	Review           tCond         0.610 μ5/cm         0.604 μ5/cm         0.603 μ5/cm         0.603 μ5/cm         0.599 μ5/cm         0.599 μ5/cm         0.599 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm         0.596 μ5/cm	tRes	Signature Sample Mode	Protocol Name are are are are are	< <u>1</u> /1	An
	Graph           Sample Results - Replace Data/Time           04/30/2019 076389           04/30/2019 065439           04/30/2019 065439           04/30/2019 065439           04/30/2019 065439           04/30/2019 065439           04/30/2019 065439	Export Sample Results, Report, 2024-05-17 Sample Name Sample Sample Sample Sample Sample Sample Sample	Print Sample Type Sample Sample Sample Sample Sample	Rep #           37           36           35           34           33           32	Rejected	TOC 31.4 ppb 32.3 ppb 32.8 ppb 33.3 ppb 30.6 ppb 30.7 ppb	IC 628 ppb 625 ppb 61.9 ppb 60.5 ppb 60.5 ppb 60.5 ppb 60.5 ppb 60.1 ppb	TC 94.2 ppb 94.8 ppb 94.7 ppb 94.3 ppb 91.1 ppb 90.8 ppb	rCond 0.618 µS/cm 0.614 µS/cm 0.612 µS/cm 0.608 µS/cm 0.605 µS/cm 0.604 µS/cm	Res	Temp 25.6 °C 25.6 °C 25.6 °C 25.7 °C 25.6 °C 25.6 °C 25.6 °C	Review.           tCond           0.610 μ5/cm           0.603 μ5/cm           0.639 μ5/cm           0.599 μ5/cm           0.596 μ5/cm           0.596 μ5/cm	tRes 	Signature Sample Mode	S Protocol Name		An

Figure 5-2: Sample Results screen - Reports tab

<b>c -</b> Sample Results table	<b>d -</b> Expand bottom table
	<b>c -</b> Sample Results table

#### To select a sample report and view the data

- 1. On the *Sample Results* screen, *Reports* tab (<u>Figure 5-2</u>), Use the vertical scroll bar to navigate through the records in the table.
- 2. Click the *Filter* icon to filter the data by specific categories. See <u>Filtering Results</u> <u>Data on page 104</u> for instructions.
- **3.** To expand the records table on the upper portion of the screen, click the *Expand* ⊗ button (b). Any other table on the screen closes and the *Expand* ⊗ button changes to the *Show Split View* **≥** button.
- **4.** To sort the data in the records table in ascending or descending order by column heading, click the column heading (for example, *Timestamp*).
- 5. To return to the view of multiple tables, click the Show Split View Selit View statement.
- 6. Select a report to view its analysis details *Sample Results* table on the lower portion of the screen. Use the vertical scroll bar to navigate through the records in the table. Use the horizontal scroll bar to view additional columns.
- 7. To expand the Sample Results table on the lower portion of the screen, click the Expand Results ▲ button (see Figure 5-2, at d, on page 98). The records table closes and the Expand Results ▲ button changes to the Show Split View Subtron.

≣	ممہ Data Histo Sample Res	ory sults														
مہم	Samples Repo	orts														
	Sample Results - Replicate Date/Time	Sample_Results_Report_2024-05-17 Sample Name	7 Sample Type	Rep #	Rejected	тос	ю	тс	rCond	Res	Temp	tCond	tRes	Sample Mode	Protocol Name	An
×	04/30/2019 07:00:39	Sample	Sample	37		31.4 ppb	62.8 ppb	94.2 ppb	0.618 µS/cm		25.6 °C	0.610 µS/cm				
	04/30/2019 06:58:39	Sample	Sample	36		32.3 ppb	62.5 ppb	94.8 ppb	0.614 µS/cm		25.6 °C	0.604 µS/cm				
A	04/30/2019 06:56:39	Sample	Sample	35		32.8 ppb	61.9 ppb	94.7 ppb	0.612 µS/cm		25.6 °C	0.603 µS/cm				
	04/30/2019 06:54:39	Sample	Sample	34		33.3 ppb	61.0 ppb	94.3 ppb	0.608 µS/cm		25.7 °C	0.599 µS/cm				
	04/30/2019 06:52:38	Sample	Sample	33		30.6 ppb	60.5 ppb	91.1 ppb	0.605 µS/cm		25.6 °C	0.596 µS/cm				
1	04/30/2019 06:50:38	Sample	Sample	32		30.7 ppb	60.1 ppb	90.8 ppb	0.604 µS/cm		25.6 °C	0.596 µS/cm				

Figure 5-3: Sample Reports Screen with Expanded Sample Results Table

- 8. To return to the view of multiple tables, click the Show Split View Selit View.
- 9. To view a graph, export or print the report, click the associated Graph..., Export..., or Print... button. If DataGuard is enabled, you can review and sign the report from this screen as well. See <u>"Graphing Results Data" on page 110</u> and <u>"Printing and Exporting Results Data" on page 125</u> for more information.



**NOTE:** Reports larger than 5,000 records cannot be printed or exported to PDF. They can only be exported as .txt, .xlsx, and .csv.

## The Protocol Results Screen

To display the *Protocol Results* screen, click the *Data History* icon and select the *Protocol Results* menu option. Figure 5-4 shows the *Protocol Results* screen, which has four tabs. Each tab displays a separate screen: *User Protocols, Calibrations, Verifications,* or *Validations*.



Figure 5-4: Protocol Results Screen with Protocols and Results Tables

<b>a</b> - User Protocol table <b>b</b> - Expand top table	<b>c -</b> Sample Results table	<b>d -</b> Expand bottom table
------------------------------------------------------------	------------------------------------	--------------------------------



**NOTE:** The Signatures, Reviewed, and Approved columns, and the **Review...** and **Signatures** buttons appear on the four tabs of the Protocol Results screen only when DataGuard is enabled.

#### To select a type of protocol results and view the data

- 1. On the *Protocol Results* screen (<u>Figure 5-4</u>), click the tab for the protocol results that you want to display.
- 2. Records matching the selected type appear in a table in the upper portion of the screen (Figure 5-4, at *a*). For example, if you selected the *User Protocols* tab, user protocol records appear in the table.

Use the vertical scroll bar to navigate through the records in the table.

- **3.** To expand the records table on the upper portion of the screen, click the *Expand* button (Figure 5-4, at **b**). Any other table on the screen closes and the *Expand* button changes to the *Show Split View* **≥** button.
- **4.** To sort the data in the records table in ascending or descending order by column heading, click the column heading (for example, *Timestamp* or *Analyzer Name*).
- 5. To return to the view of multiple tables, click the Show Split View **S** button.
- **6.** To view a summary of results (for *Calibrations*, *Verifications*, and *Validations* **only**), select a protocol and click the **Summary** button. The *Results Summary* dialog box appears.

Sample Conductivity Lin	earity
Correlation Coefficient (R)	1.0000
Square of Correlation Coefficient (R <sup>2</sup> )	1.0000
Regression Slope	1.000
Regression y-intercept	0.013 µS/cm
Residual Sum of Squares	0.000 µS/cm
Square of Correlation Coefficient $\geq$ 0.999	Passec
Completed	
Completed	
	Close

7. Select a record to view its analysis details *Sample Results* table on the lower portion of the screen. Use the vertical scroll bar down and up to navigate through the records in the table. Use the horizontal scroll bar to view additional columns.



**NOTE:** Four of the column headings in the Sample Results table always appear: Timestamp, Sample Name, Step #, and Rep #. The other column headings (for example: Lot #, Sample Type, TOC, IC, and TC) are set by selecting options in the Application Display area of the Displayed Data tab on the Settings screen. For more information, see "To configure the data displayed in the DataShare Elite application" on page 26

- 8. To expand the Sample Results table on the lower portion of the screen, click the Expand Results & button. The records table closes and the Expand Results & button changes to the Show Split View Substitution (similar to the example in Figure 5-2).
- **9.** To return to the view of multiple tables, click the *Show Split View* button.

## Viewing Archived Data

DataShare Elite allows you to view data from one archive file at a time on the Sample Results and Protocol Results screens. The data from the archive file is separate from the data in the active DataShare Elite database. You cannot view both sets of data at the same time. If you back up, archive, or restore data while you are viewing data from an archive file, DataShare Elite backs up, archives, or restores data in the active DataShare Elite database, not the archived data that you are viewing.



**NOTE:** You can view error history data in the archive file on the Errors screen and DataGuard audit trail data in the archive file on the Audit Trail screen.

## To view an archive file

- 1. Click the Data History we icon and select the View Archive... menu option. The Select DataShare Elite Archive File dialog box appears as a File Explorer window.
- 2. Navigate to the archive file, select it, and click Open. A progress bar appears while DataShare Elite loads the data from the archive file in place of the data in the active DataShare Elite database. The archived data then appears on the Sample Results screen, the four tabs of the Protocol Results screen, the two tabs of the Errors screen, and — if DataGuard is enabled — the three tabs of the Audit Trail screen. A red Archived Data **f** icon appears in the upper left corner of each of those screens to indicate that you are viewing archived data (not the active DataShare Elite database).

≣	ممہو Data Histo	<b>ry</b> llts			
0.0	Samples Report	rts			
~~~	Sample Results - s Replicate Date/Time	Sample_Results_Report_2024-05-17 Sample Name	Sample Type	Rep #	Rejected
×	04/30/2019 07:00:39	Sample	Sample	37	
	04/30/2019 06:58:39	Sample	Sample	36	
A	04/30/2019 06:56:39	Sample	Sample	35	
	04/30/2019 06:54:39	Sample	Sample	34	
-	04/30/2019 06:52:38	Sample	Sample	33	
1	04/30/2019 06:50:38	Sample	Sample	32	

Figure 5-5: Sample Results Screen with Archived Data

- **3.** To see the directory path and name of the archive file being viewed, hover the cursor over the *Archived Data* **•** icon.
- **4.** You can view the data from the archive file in the same ways that you can view the data in the active database. The *Archived Data* **⊡** icon appears on all the screens with archived data.
- 5. To once again view the data in the active DataShare Elite database or to load data from another archive file, click the *Data History* مهمه icon and select the *Close Archive...* menu option. DataShare Elite displays the data in the active database in the *Sample Results* window.

# FILTERING RESULTS DATA

On the *Sample Results* screen and on the four tabs of the *Protocol Results* screen, you can filter results data in the active DataShare Elite database. You can filter results data by:

#### Sample Results:

- Timestamp
- Analyzer S/N (serial number)
- Analyzer Type
- Analyzer Name
- Protocol Type
- Sample Name
- Sample Type
- Sample Mode
- Rejected
- Results data types (TC, TC, IC, rCond, Temp, tCond)
- (DataGuard only) Geography (Location, Site, Region)

#### **Protocol Results:**

- Timestamp
- Protocol Name
- Analyzer S/N (serial number)
- Analyzer Type
- Analyzer Name
- (DataGuard only) Signature
- (DataGuard only) Signature Workflow
- (DataGuard only) Geography (Location, Site, Region)
- Sample Name

The options that appear on the menu for filtering data vary based on the options that have been selected in the *Application Display* area of the *Displayed Data* tab on the *Settings* screen. For more information, see <u>"To configure the data displayed in the DataShare Elite application" on page 26</u>

### To filter results data

Use this procedure to narrow down the displayed data from all results to a subset of the results.

1. On the *Sample Results* screen or any of the four tabs on the *Protocol Results* screen, click the *Filter* icon. A menu for selecting a filter appears. Figure 5-6 shows the types of filters for sample results when DataGuard has been enabled.

≣	~~	<b>Dat</b> a Sam	a Hi ple R	sto lesu	<b>Dry</b> Ilts
مہمہ		Samples	R	epor	ts
		<b>V</b> Filter		Tir	nestamp
S.		Sample Re		An	alyzer S/N
•		Replicate Da		An	alyzer Type
•		27 Aug 2021		An	alyzer Name
		27 Aug 2021		Pro	otocol Name
		27 Aug 2021		Pro	otocol Type
i		27 Aug 2021		Sa	mple Name
		27 Aug 2021		Sa	mple Type
1.		2.7.692021		Sa	mple Mode
	TOC	2		Re	sults 🔸
	TC		17:44:	19	Sample 8
	IC	IC rCond		05	Sample 7
	rCo			53	Sample 6
	Tem	ιp	17:19:	41	Sample 5
	tCo	tCond		29	Sample 4

Figure 5-6: Filter Options for Data on Sample Results Screen



**NOTE:** Timestamp and Sample Name always appear as options on the filter menu. Other data must be selected in the Application Display area of the Displayed Data tab on the Settings screen in order to appear as options on the filter menu. For example, Rejected appears on the filter menu only when it

*is selected in the Application Display area of the Displayed Data tab. For more information, see* <u>"To configure the data displayed in the DataShare Elite application" on page 26</u>

**2.** To specify a date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears. If you do not want to specify a date or date range, go to Step 6.



**NOTE:** You can filter data in any order. You can specify other filters before you specify the Timestamp filter, or you can specify other filters without specifying the Timestamp filter.

<b>II</b> Timestamp		×
Filter		
=		•
Value		
4/22/2024		
	ОК	Cancel

- **3.** Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.
- **4.** Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value (1 or 2) field.
- Select the date by clicking the *Calendar* 15 icon next to the date field.

Timestamp					_					
Filter										
Betw	een									•
Value	1									
	3/1/2	2024								
Value 2										
	4/22	/2024								
			•		Ма	rch 2	024		►	_
			Su	Мо	ти	We	Th	Fr	Sa	
·		_	25	26	27	28	29	1	2	-
	1	308	3	4	5	6	7	8	9	24.8
	1	323	10	11	12	13	14	15	16	:4.8
	1	348	17	18	19	20	21	22	23	:4.8
	1	407	24	25	26	27	28	29	30	14.9
			51		2	5	-+	5	0	_

Click the day you want, or use the **Previous**  $\triangleleft$  and **Next**  $\blacktriangleright$  buttons to navigate to the month and year, then click the day you want.

5. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.

Samples	Reports			
<b>V</b> Filter	Timestamp X			
Sample Results				
Replicate Date/Time Sample Name				

6. To filter the data by Analyzer serial numbers (S/N) or the names of protocols, select the *Analyzer S/N* or *Protocol Name* filter. The *Analyzer S/N* or *Protocol Name* dialog box appears. If you do not want to filter the data by Analyzer serial numbers or the names of protocols, go to Step 11.

Protocol Name		×
Filter		
Contains		•
Value		
Sample Conductivity	Linearity	
	ОК	Cancel

- 7. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- **8.** Specify the *Value* for filtering. (When typing more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.) Examples:
  - To display data for an Analyzer with serial number 1065, select *Is* for the *Filter* and specify *1065* for the *Value*.
  - To display data for all previously run multipoint protocols, select *Contains* for the *Filter* and specify *multipoint* for the *Value*.
- **9.** When you finish, click the **OK** button. An indicator that the *Analyzer S/N* or *Protocol Name* filter is active appears next to the *Filter* icon.
- **10.** Specify values for the other filter (*Analyzer S/N* or *Protocol Name*) or continue to the next step.
- **11.** To filter the data by the type of Analyzer, select the *Analyzer Type* filter. The *Analyzer Type* dialog box appears. If you do not want to filter the data by Analyzer serial number, go to Step 15.
- **12.** Select an option from the *Filter* list: = (equal to) or  $\neq$  (not equal to).
- 13. On the Value list, select a type of Analyzer (such as M500, M9, or CheckPoint).
- **14.** When you finish, click the **OK** button. An indicator that the *Analyzer Type* filter is active appears next to the *Filter* icon.

**15.** If DataGuard is enabled, you can set filters for *Location*, *Site*, and/or *Region*.

- To filter data by **Location** Select the *Geography* filter and then select the *Location* subfilter. Select an option form the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a location.
- To filter data by **Site** Select the *Geography* filter and then select the *Site* subfilter. Select an option from the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a site.
- To filter data by **Region** Select the *Geography* filter and then select the *Region* subfilter. Select an option from the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a region.
- **16.** When you finish specifying values for a filter, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.
- **17.** If you are filtering sample results, you can set six more filters:
  - To filter data by Protocol Type Select the Protocol Type filter. Select a Filter option: = (equal to) or ≠ (not equal to). On the Value list, select either None or Custom. Sample results with Protocol Type None do not have a name in the Protocol Name column. Sample results with Protocol Type Custom do have a name in the Protocol Name column.
  - To filter results data by Sample Name Select the Sample Name filter. Select an option from the Filter list: Contains, Does Not Contain, Is, Is Not, Starts With, or Ends With. In the Value field, type one or more words found in the name of a previously-run protocol (or protocols), such as Sample 1. (When typing more than one word, all words must be in the exact sequential order. The field is not case sensitive.)
  - To filter data by **Sample Type** Select the *Sample Type* filter. Select a *Filter* option: = (equal to) or ≠ (not equal to). In the *Value* field, select a value from the list of Sample Types (such as **Blank**, **Linearity**, or **Rs**).
  - To filter results data by **Sample Mode** Select the *Sample Mode* filter. Select an option from the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select *Autosampler, Averaged, Grab, Multi-Grab, Online, Timed,* or *Unknown*.
- To filter data by Rejected Select the Rejected filter. Select a Filter option: = (equal to) or ≠ (not equal to). On the Value list, select either Not Rejected or Rejected.
- To filter results data by data type (TOC, TC, IC, rCond, Temp, and/or tCond) Select the *Results* filter and then select a subfilter: TOC, TC, IC, rCond, Temp, or tCond.

Select an option on the *Filter* list: > (greater than),  $\ge$  (greater than or equal to),  $\le$  (less than or equal to), < (less than), or *Between*.

Based on the *Filter* option you selected, specify a *Value* or a range of values (*Value 1*, the lowest value in the range, and *Value 2*, the highest value in the range). Each value can have up to three decimal places. The units for **TOC**, **TC**, and **IC** are *ppb*. The units for **rCond** and **tCond** are  $\mu S/cm$ . The unit for **Temp** is °C.



**NOTE:** You can set filters for multiple results data types. For example, you can set filters for TOC and IC or for rCond, Temp, and tCond.

- **18.** When you finish specifying values for a filter, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.
- **19.** If you are filtering protocol results with DataGuard enabled, you can filter the data by signatures (user names). Select the *Signature* filter. The *Signature* dialog box appears. If you do not want to filter the data by signatures, go to Step 23.
- **20.** Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- 21. Specify the Value for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive. For example, to display data signed by Alice Carmichael, select *Contains* for the *Filter* and specify *carmichael* for the Value. To enter Alice Carmichael's full user name, select *Is* for the *Filter* and specify *alice carmichael* for the Value.
- **22.** When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.
- 23. To review the values for a filter, hover over the filter.
- **24.** To change the values for a filter, click its indicator. The dialog box in which you specified the values appears. Change the values and click the **OK** button.
- **25.** To remove one or more filters, click the  $\boxed{x}$  on the right side of the filter indicator.

# **GRAPHING RESULTS DATA**

This section includes instructions for viewing sample results and protocol results in a graphical format using the configurable *Trend Data* format. Use the *Analyzer Comparison* format to compare the data from two or more instruments in a graphical format.

Refer to these topics:

- <u>"To view sample results data in a graph"</u>
- <u>"To compare sample results between Analyzers / Sensors" on page 118</u>
- <u>"To view protocol results data in a graph" on page 124</u>

### To view sample results data in a graph

1. When you are ready to graph the data displayed on the *Sample Results* screen or on one of the four tabs of the *Protocol Results* screen, click the **Graph...** button. The *Graph Options* dialog box appears. If graphing Sample Results, the pop-up shown below will appear; for Protocol Results, the pop-up will not offer Analyzer Comparison.

<b>I</b> Graph Options	×
Graph Type	
Trend Data	Analyzer Comparison
Select Data Types	5
🖌 тос	✓ rCond
🖌 тс	✓ Temp
IC	✓ tCond
	OK Consol
	Cancel

- 2. Select *Trend Data*. To compare Sample Result data between Analyzers, see <u>"To</u> compare sample results between Analyzers / Sensors" on page 118
- **3.** Select one or more of the following results data types to include: *TOC, TC, IC, rCond, Temp,* or *tCond*.



**NOTE:** The data to be graphed determines which Data Types appear on the Graph Options dialog box. For example, you are displaying 654 result records. The result records have TOC, TC, and IC data but no rCond, Temp, or tCond data. Only the TOC, TC, and IC data types will appear on the Graph

Options dialog box. The configuration of the Default Graph Data settings determines whether a check mark appears in the selection boxes for the data types. For more information, see <u>"To configure default graph data" on page 23</u>

4. Click the **OK** button. The graph appears.

If you are graphing one or more of TOC, IC, and TC **or** one or more of rCond, Temp, and tCond, the single graph shown in Figure 5-7 appears.

If you are graphing both one or more of TOC, IC, and TC **and** one or more of rCond, Temp, and tCond, the graph with multiple tabs shown in <u>Figure 5-8</u> appears.



Figure 5-7: Graph for TOC



**NOTE:** When both TOC/IC/TC and rCond/temp/tCond result data types are selected, DataShare Elite produces separate graphs for TOC (including IC and TC) and Conductivity, and a combined graph for both.



a - Data types b - Graph Options c - Graph paging period

- **5.** When both TOC/IC/TC and rCond/temp/tCond result data types are selected, DataShare Elite produces separate graphs for TOC (including IC and TC) and Conductivity, and a combined graph for both (Figure 5-8, at *a*). Click a tab to view its corresponding graph.
- 6. To specify options for the data displayed on the graphs, click the Graph Options button or the the *Open* ◀ icon above *Graph Options* (Figure 5-8, at *b*). The *Graph Options* pop-out dialog box appears.



**NOTE:** The Graph Paging Period function (Figure 5-8, at c), is described on page <u>115</u>.



Figure 5-9: Graph Options Dialog Box

7. Put a check mark in the *Auto* check boxes for *Y-Axis Customization,* in which DataShare Elite supplies the values on the Y-axis based on the lowest and highest data points. For example, if a TOC/TC/IC graph has data points between 100 ppb and 1000 ppb, put a check mark in the *Auto* check box for the *TOC (ppb)* Y-axis to have DataShare Elite supply a range of Y-axis values from 100 ppb to 1000 ppb.

In Figure 5-9 DataShare Elite is supplying the range of values on all three Y-axes:

- The *TOC (ppb)* Y-axis, which appears on both the TOC/TC/IC graph and a combined graph for TOC/TC/IC and conductivity (rCond and tCond)
- The Conductivity (μS / cm) Y-axis, which appears on both the conductivity (rCond, Temp, and tCond) graph and a combined graph for TOC/TC/IC and conductivity (rCond and tCond)
- The *Temperature* (°*C*) Y-axis, which appears on the conductivity (rCond, Temp, and tCond) graph

**8.** To specify a range of values for one of the Y-axes, remove the check mark from the *Auto* check box. Figure 5-10 shows the *Graph Options* dialog box with the check mark removed from the *TOC (ppb)* Y-axis.



Figure 5-10: Graph Options Dialog Box Showing Min/Max Y-Axis Values

- **9.** Specify minimum and maximum values for the Y-axis. In Figure 5-10 the minimum value is *100* and the maximum value is *300*. Specify whole numbers. If you specify a decimal number, DataShare Elite will replace it with the nearest whole number.
- **10.** If the graph has multiple tabs, repeat Step 8 and Step 9 for each Y-axis whose minimum and maximum values you want to specify.

- **11.** Select a shape for the data points on the graph: *None, Circle* (default), *Square, Triangle, Cross,* or *Star.*
- **12.** Select a size for the data points: *0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5,* or *5*. Figure 5-11 shows a graph with *Circle* data points displayed at *Size 5*.



Figure 5-11: Graph with Size 5 Circle Data Points

### Using the Graph Paging Period to display data

The Graph Paging Period is valuable for displaying the data in a more useful way. It does not change the data itself, but lets you "zoom in" on the data points that are most relevant. The next steps in this procedure explain how to change the amount of data displayed in the graph that you are viewing.



**NOTE:** Do **NOT** click the **Close** button while you are specifying graph options. DataShare Elite will close the Graph window and returns to the Sample Results screen.

You can adjust the Graph Paging Period in three ways:

If you select the Graph Paging Period from File Options, your choices are Full Selection, 1 Hour, 4 Hours, 8 Hours, 12 Hours, 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, or 1 Year. For example, you are viewing three graphs (TOC, Conductivity, and Combined) with data that spans a 12-hour period. To print or save one set of three graphs, with each graph containing all 12 hours of data, select Full Selection. To print or save the sets of three graphs, with each graph containing four hours of data, select 4 Hours. Click the Close icon to close the Graph Options pop-out dialog box.



• The Quick View dialog box: To change the amount of data displayed in the graph, click **Quick View** and select an option: *All, 1 Hour, 4 Hours, 8 Hours, 12 Hours, 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, or 1 Year.* 



• The sliding Graph Paging Bar:



- **13.** To print a graph or export it to a file, see <u>"Printing and Exporting Results Data" on page 125</u>
- **14.** When you finish working with the graph, click the **Close** button to return to the *Sample Results* or *Protocol Results* screen.

### To compare sample results between Analyzers / Sensors

This procedure provides instructions for comparing sampling results data from two or more instruments in a graphical format.

1. On the *Sample Results* screen, click the **Graph**... button. The *Graph Options* dialog box appears.

Graph Options ×	Select this option
Graph Type	
Trend Data     Analyzer Comparison	
Select Data Types	
✓ TOC ✓ rCond	
🖌 TC 🖌 Temp	
✓ IC ✓ tCond	
OK Cancel	

2. Select the *Analyzer Comparison* option. The *Select Data Type* field and a list of available Analyzers by Analyzer type and serial number appear.



**NOTE:** The Error Message **()** icon indicates that you must select at least one Analyzer. Hover the mouse pointer over the icon to see the error message.

G	Graph Options						×
Gra	aph Type						
С	) Trend Data	Analyzer C	omparison				
Se	elect Data Type						
	тос		•				
Se	elect Analyzers to	o Compare					
4	Available				Selected		
4	Analyzer Type	Serial Number			Analyzer Type	Serial Number	0
	500RL	5292					
	M500	0259					
	M500	1234		Ľ			
	M5310C	06918					
	M9	00006					
					OK	Cancel	

- **3.** Select a results data type (**TOC**, **IC**, **TC**, **rCond**, **Temp**, or **tCond**) from the *Data Type* list.

Graph Options				:
iraph Type				
🔵 Trend Data	Analyzer Com	parison		
Select Data Type				
тос	•			
Select Analyzers to	Compare	_		
Available			Selected	
Analyzer Type	Serial Number		Analyzer Type	Serial Number
M5310C	06918		500RL	5292
M9	00006		M500	0259
M9	00060		M500	1234
M9e	0006			
			ОК	Cancel

**5.** Click the **OK** button. A graph appears with color-coordinated data points for each Analyzer or Sensor that you selected.



#### Figure 5-12: Graph Comparing Analyzers

6. To specify options for the data displayed on the graph, click the *Open* ≤ icon above *Graph Options*. The *Graph Options* pop-out dialog box appears.



#### Figure 5-13: Graph Options Dialog Box

- 7. Put a check mark in the *Auto* check box for a *Y-Axis Customization* option to have DataShare Elite supply the values on the Y-axis based on the lowest and highest data points. For example, if a TOC/TC/IC graph has data points between 100 ppb and 200 ppb, put a check mark in the *Auto* check box for the *TOC (ppb)* Y-axis to have DataShare Elite supply a range of Y-axis values from 100 ppb to 200 ppb. See Figure 5-13.
- **8.** To specify a range of values for the Y-axis, remove the check mark from the *Auto* check box. Figure 5-14 on page 122 shows the *Graph Options* dialog box with the check mark removed from the *TOC (ppb)* Y-axis.

Gamples Toc Results D2/11/2021 D5:07:00 to 06/09/2022 10:28:18	Graph Options Y-Axis Customization Auto TOC (ppb) Min 118 Max 125 Line Markers Shape Circle  Size
125       124         124       123         123       124         124       123         122       124         123       124         124       124         123       124         124       124         125       124         121       124         120       124         121       124         120       124         121       124         120       124         121       124         120       124         121       124         120       124         121       124         122       124         124       124         125       124         126       124         127       124         128       124         129       124         120       124         121       124         122       124         123       124         124       124         125       124         126       124         127       1	Y-Axis Customization Auto TOC (ppb) Min 118 Max 125 Line Markers Shape Circle  Size
SURC (3292)       MSUU (0259)       MSUU (1234)         Quick View       Start       02/11/2021 05:07:00       End       06/09/2022 10:28:18       Graph	1.5 Show lines File Options Graph Paging Period Full Selection

Figure 5-14: Graph Options Dialog Box Showing Min/Max Y-Axis Values

- **9.** Specify minimum and maximum values for the Y-axis. In Figure 5-14 the minimum value is *118* and the maximum value is *125*. Specify whole numbers. If you specify a decimal number, DataShare Elite will replace it with the nearest whole number.
- **10.** Select a shape for the data points on the graph: *None, Circle* (default), *Square, Triangle, Cross,* or *Star.*
- **11.** Select a size for the data points: 0, 0.5, 1, 1.5, 2, 2.5, 3, 3.5, 4, 4.5, or 5.
- 12. If you are going to print or save the graph, select the Graph Paging Period. Your choices are Full Selection, 1 Hour, 4 Hours, 8 Hours, 12 Hours, 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, or 1 Year. For example, you are viewing a graph with data that spans a 12-hour period. To print or save one graph with all 12 hours of data, select Full Selection. To print or save three graphs, with each graph containing four hours of data, select 4 Hours.



**NOTE:** The Graph Paging Period has no effect on the data that you are viewing. The next steps in this procedure explain how to change the amount of data displayed in the graph that you are viewing.

**13.** Click the *Close* icon to close the *Graph Options* pop-out dialog box.



**NOTE:** Do **NOT** click the **Close** button while you are specifying graph options. When you click that button, DataShare Elite closes the Graph window and returns to the Sample Results or Protocol Results screen.

**14.** To change the amount of data displayed in the graph (Figure 5-15):

- Click **Quick View** and select an option: *All, 1 Hour, 4 Hours, 8 Hours, 12 Hours, 1 Day, 1 Week, 1 Month, 3 Months, 6 Months, or 1 Year.*
- Adjust the size of the sliding bar by clicking and dragging the arrows on either side of the bar.



Start date and time (hh:mm:ss) and end date and time for the displayed data. When you move the sliding bar, the values in these display fields change.

#### Figure 5-15: Selecting Data to be Graphed

- **15.** To view different portions of the graph data, move the sliding bar. To print a graph or export it to a file, see <u>"Printing and Exporting Results Data" on page 125</u>
- **16.** When you finish working with the graph, click the **Close** button to return to the *Sample Results* screen.

### To view protocol results data in a graph

- 1. When you are ready to graph the data for a selected protocol result displayed on one of the four tabs of the *Protocol Results* screen, click the **Graph**... button. The *Graph Options* dialog box appears.
- 2. Select one or more of the following results data types to include: *TOC, TC, IC, rCond, Temp,* or *tCond.*



**NOTE:** Default results data types that appear on the Graph Options dialog box are configured on the General tab of the Settings screen. For instructions, see <u>"To configure default graph data" on page 23</u> Also, if the data to be graphed does not include one or more of the results data types, those data

types do not appear on the Graph Options dialog box.

- 3. Click the **OK** button to view the graph.
- **4.** To print a graph or export it to a file, see <u>"Printing and Exporting Results Data" on page 125</u>
- 5. When you finish working with the graph, click the **Close** button to return to the *Protocol Results* screen.

# PRINTING AND EXPORTING RESULTS DATA

DataShare Elite allows you to print results data in tabular format and graphical format. Additionally, you can export results data in one or more of the following file formats: text (\*.txt), comma separated values (\*.csv), Microsoft Excel (\*.xlsx), and PDF (\*.pdf).



Reports larger than 5,000 records cannot be printed or exported to PDF. They can only be exported as .txt, .xlsx, and .csv.

You can password protect exported Microsoft Excel and PDF files.

See <u>"Exporting Results Data" on page 133</u>

### **Printing Results Data**

This section includes:

- <u>"To print sample results data or save it to a file" on page 126</u>
- <u>"To print protocol results data or save it to a file" on page 128</u>
- <u>"To print a graph or save it to a file" on page 130</u>

### To print sample results data or save it to a file

1. While you are viewing data on the *Sample Results* screen, click the **Print...** button. The *Print Preview* window appears.



**NOTE:** Remember to filter your sample results data before you print.

DataShare E	Elite Report											
Sample Results												
11 Aug 2021 18:03:09 to 1	2 Aug 2021 17:44:19											- 1
Applied Filters												
Analyzer Type = M9 TOC Between: 200 and 3	800											
Replicate Date/Time	Sample	Lot #	Rep #	тос	IC	тс	rCond	Temp	tCond	Analyzer	Sample Mode	
12 Aug 2021 17:44:19	Sample 8 (Sample)		1	249 ppb	464 ppb	713 ppb	2000 µS/cm	24.5 °C	2000 µS/cm	M9   0006		
Analyzer Name: M9 - L	ab 1 Protocol Name:	-										
12 Aug 2021 17:36:05	Sample 7 (Sample)		1	259 ppb	455 ppb	714 ppb	2000 µS/cm	24.5 °C	2000 µS/cm	M9   0006		
12 Aug 2021 17:27:53	Sample 6 (Sample)	-	1	260 ppb	456 ppb	716 ppb	2000 uS/cm	24.5 °C	2000 uS/cm	M9 I 0006		- H
Analyzer Name: M9 - L	ab 1 Protocol Name:			200 ppb	400 ppb	rio ppo	2000 μο/οπ	24.0 0	2000 μο/οπ	10000		
12 Aug 2021 17:19:41	Sample 5 (Sample)		1	261 ppb	451 ppb	712 ppb	2000 µS/cm	24.6 °C	2000 µS/cm	M9   0006		- H
Analyzer Name: M9 - L	ab 1 Protocol Name:	-										
12 Aug 2021 17:11:29	Sample 4 (Sample)		1	264 ppb	451 ppb	715 ppb	2000 µS/cm	24.5 °C	2000 µS/cm	M9   0006		. II
Analyzer Name: M9 - L	ab 1 Protocol Name:	-										
12 Aug 2021 17:03:17	Sample 3 (Sample)		1	267 ppb	450 ppb	717 ppb	2000 µS/cm	24.5 °C	2000 µS/cm	M9   0006		
Analyzer Name: M9 - L	ab 1 Protocol Name:	-										
12 Aug 2021 16:55:05	Sample 2 (Sample)		1	270 ppb	454 ppb	724 ppb	2000 µS/cm	24.6 °C	2000 µS/cm	M9   0006		
Analyzer Name: M9 - L	ab 1 Protocol Name:	-		000 h	474	704	00000/	04.0.80	00000/	M0 1 0000		- II
Analyzer Name: M9 - L	ab 1 Protocol Name:	-		200 ppb	47 T pp0	731 ppu	2000 µ3/011	24.0 C	2000 µ3/011	M9   0000		
				Prii DS	nted on 07 M Printed by Tr E Software V	ay 2024 13:4 est Superuse /ersion 01.02	17:25 r 2.008					
file:///C:/Program%20Files/S	ievers/DataShare%20Elite/	Reporting/	Web/hvds-re	eport.html								1/6

Figure 5-16: Print Preview for Sample Results

The print preview includes a graph (three graphs when the sample results include both TOC/TC/IC and conductivity/temperature data). Figure 5-17 on page 127 shows the last page of the print preview in Figure 5-16.



**NOTE:** The header that appears on the report is pre-defined on the General tab of the Settings screen. To set up or revise a header, see <u>"To configure the report header" on page 20</u>

§Print Preview	-		×
DataShare Elite Report Sample Results 11 Aug 2021 18:03:09 to 12 Aug 2021 17:44:19			Í
Printed on 07 May 2021 13:49:07 Printed by Test Superuser DSE Software Version 01:02:008 file:///C:/Program%20Files/Sievers/DataShare%20Elite/Reporting/Web/hvds-report.html	6/6		
Print	C	lose	

Figure 5-17: Graphs Included in Print Preview for Sample Results

**2.** Review the print preview to make sure that it contains the data that you want to print. Click the **Print** button to either print a hard copy or save a PDF of the file.



**NOTE:** If an Adobe PDF print program is installed on the computer, it will show as one of the available printers.

3. On the *Print Preview* window, click the **Close** button.

### To print protocol results data or save it to a file

1. While you are viewing a specific protocol on the *Protocol Results* screen, click the **Print...** button. The *Print Preview* window appears.

								-	
DataSh Grab 02 02 Mar 2022 08:	are Elite F	Protocol	Results						
Protocol			Grab 02	Firmware V	ersion		01.05.018		
Tested On		02 Mar	2022 08:30:34	Software v Sample Mo	de		Grab		
Analyzer Typ	e		M500						
Analyzer S/N			1234						
Analyzer Na	ne								
Step #	1	Nu	mber of Repeats		3 <b>TOC</b>		On		
Vial Position	0	Nu	mber of Rejects		2 Conduction	vity	On		
Sample Name	Blank 01	Ac	id Rate (µL/min)						
Lot #	Blank	Ux	id Rate (µL/min)						
Start Date	02 Mar 2022 (	08:30:34							
End Date	02 Mar 2022 (	08:46:34							
Rep # Reject	Timestamp	тос	IC	тс	rCond	Temp	tCond		
3 No	08:46:34	134 ppb	75.6 ppb	210 ppb	1.399 µS/cm	30.0 °C	1.302 µS/cm		
	Average	134 ppb	75.6 ppb	210 ppb	1.399 µS/cm	30.0 °C	1.302 µS/cm		
	Std Dev	0.00 ppb	0.00 ppb	0.00 ppb	0.000 µS/cm	0.00 °C	0.000 µS/cm		
	RSD	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %	0.00 %		
			Printed on 24	Jun 2024 05:40:	20				
			Printed L	y Super User					
fl	00511101	0h	DSE Software	Version 02.00.0	01		10		
file:///C:/Program?	szunites/Sievers/Data	ionare%20Elite/Rep	iorung/web/hvds-re	port.html			1/3		

Figure 5-18: Print Preview for Protocol Results

As with Sample results, the Protocol results print preview includes a graph. It also includes an optional signature block on the last page of the print preview (Figure 5-19).



**NOTE:** The signature block is optional. On the General tab of the Settings screen, you can specify whether to include the signature block. See <u>"To</u> configure print options" on page 22

Print Preview	<del></del>	O	×
DataShare Elite Protocol Results SDBS Suitability 08 Aug 2021 12:27:01 Signatures Workflow Status: Not Started			<b>^</b> 9
NOTE: A hand-written signature is required.       Name:     Date:       Reason:     Workflow:       Comments:			
			ľ
Printed on 27 Jun 2024 14 03 25 Printed by Super User DSE Software Version 02 00.001 file:///C./Program%20Files/Slevers/DataShare%20Elina/Reporting/Web/hvds-report.html 4/4			•

Figure 5-19: Signature Block Included in Print Preview for Protocol Results

**2.** Review the print preview to make sure that it contains the data that you want to print. Click the **Print** button to either print a hard copy or save a PDF of the file.



**NOTE:** If an Adobe PDF print program is installed on the computer, it will show as one of the available printers.

3. On the *Print Preview* window, click the **Close** button.

### To print a graph or save it to a file

1. While you are displaying the graph you configured in <u>"Graphing Results Data" on page 110</u>, click the **Print...** button. The *Print Preview* window appears.



- 2. Click the **Print** button. The Windows *Print* dialog box appears.
- **3.** Review the print preview to make sure that it contains the data that you want to print. Click the **Print** button to either print a hard copy or save a PDF of the file.



**NOTE:** If an Adobe PDF print program is installed on the computer, it will show as one of the available printers. You can select it to print the graph to a PDF file.

- 4. On the *Print Preview* window, click the **Close** button.
- 5. To save the graph as a file, on the open *Graph* window, click the **Save...** button. The *Save Graph* dialog box appears.

Save Graph			×
Save Options			
Export File Name Begins With	Graph		
Select the export file type(s) and	l destination folder(s)		
JPG	C:\Users\sievers\Documents		
V PNG	C:\Users\sievers\Documents		
PDF	C:\Users\sievers\Documents		
		Save	Cancel

- 6. In the *Export File Name Begins With* field, type an identifier to precede each file name for files saved or leave the default text, *Graph*.
- 7. Select (check mark) or de-select (no check mark) one or more of the following file types:
  - JPG
  - PNG
  - PDF
  - PDF (Protected)



**NOTE:** The list includes all possible file types; however, only those files types that have been pre-defined as default values appear in the dialog box. For more information about setting default values, see <u>"To configure which output file types are enabled" on page 29</u>

- 8. (Optional) If you selected the *PDF Protected* file type and have suitable privileges, you can change the password by typing a new password, and you can change the mode (*Encrypted* or *Read-Only*). A user must enter the password to open a fully encrypted file. A user can open a read-only file without the password, but the user must enter the password to change the contents of the file.
- **9.** For each file type selected, click the *Folder* icon. The corresponding Windows *Select Folder* window appears for users with appropriate privileges.
- **10.** Navigate to a folder for storing the file, highlight it, and click **Select Folder**.
- **11.** Repeat steps 9 and 10 for each file type you have selected.
- **12.** After selecting and completing file type options, click the **Save** button. In each specified location, DataShare Elite creates and saves a file for the selected file type.



**NOTE:** If your print preview is a set of three graphs (TOC, Conductivity, and Combined), each graph is saved in a separate JPG or PNG file. All three graphs are saved in one PDF file.

- **13.** Click the **OK** button when DataShare Elite prompts you that the export is complete.
- 14. On the *Graph* window, click the **Close** button.

## Exporting Results Data

You can export sample results data and protocol results data in one or more of the following file formats: text (\*.txt), comma separated values (\*.csv), Microsoft Excel (\*.xlsx), and PDF (\*.pdf). Users with the *Customize Allowed Export Types* permission have options to protect exported Microsoft Excel and PDF files with passwords.

### To export results data

1. While you are viewing data on the *Sample Results* screen or one of the tabs on the *Protocol Results* screen, click the **Export...** button. The *Export Options* window appears.

Export Sample History	,	<
Export Options		
Export File Name Begins With	Sample_Results	
Select the export file type(s) and	d destination folder(s)	
✓ Text	C:\Users\sievers\Documents	
CSV	C:\Users\sievers\Documents	
✓ Excel	C:\Users\sievers\Documents	
PDF	C:\Users\sievers\Documents	
	Export Cancel	

Figure 5-20: Export Options for Sample Results

2. In the Export File Name Begins With field, type an identifier to include in the name of the exported files or leave the default text. This default text varies based on the results data (for example, Sample\_Results or Verification\_Results) and is customizable on the Reports / Exports tab of the Settings screen. For more information, see <u>"Configuring Reports / Exports Settings" on page 29</u>)

- **3.** Select (check mark) or de-select (no check mark) one or more of the following file types for exporting options:
  - Text
  - CSV
  - Microsoft Excel
  - Microsoft Excel (Protected)
  - PDF
  - PDF (Protected)



**NOTE:** The list includes all possible file types; however, only those files types that have been pre-defined as default values appear in the dialog box. For more information about setting default values, see <u>"Configuring Reports /</u> <u>Exports Settings" on page 29</u>

- 4. (Optional) If you selected the *Microsoft Excel Protected* or *PDF Protected* file type and you have suitable privileges, you must either use the default password (if one is present, the *Password* field will be populated with a series of dots), or type a new password. You can also change the mode (*Encrypted* or *Read-Only*)—a user must enter the password to open a fully encrypted file. A user can open a read-only file without the password, but the user must enter the password to change the contents of the file.
- **5.** For each file-type option selected, click the *Windows Folder* icon. The corresponding Windows *Select Folder* window appears for users with appropriate privileges.
- 6. Navigate to and select a folder for storing the file and click the **Select Folder** button. The defined file path appears in the *Folder:* field on the *Export Options* window.
- 7. Repeat Step 5 and Step 6 for each file type to export.
- **8.** After selecting and completing file type options, click the **Export** button. DataShare Elite exports a file for each defined file type in the specified location, and an *Export Complete* message appears.
- 9. Click the OK button.

### Creating a Custom Report

You can create a report from existing Sample Results and Protocol Results in the Data History screen that is saved in the Reports tabs of each Results screen. On the Reports tab, the reports you create can then be filtered, printed, and exported.

#### To create a custom report

1. Click the Data History 🖧 icon and select either Sample Results or Protocol Results on the Data History menu. The Sample Results or Protocol Results screen appears.

Sample Results are used for illustrating this procedure—the method for Protocol Results is the same.

Samples Repo	rts													
<b>V</b> Filter														
Sample Results Replicate Date/Time	Sample Name	Sample Type	Sample Mode	Rep #	тос	ю	тс	rCond	Temp	tCond	Protocol Name	Analyzer Name	Analyzer Type	Ana
02 Mar 2022 13:48:55	Sample 01	Sample	Grab	4	120 ppb	75.7 ppb	196 ppb	1.301 µS/cm	25.0 °C	1.354 µS/cm	Grab 01		M500	
02 Mar 2022 13:45:55	Sample 01	Sample	Grab	3	126 ppb	75.6 ppb	202 ppb	1.299 µS/cm	25.0 °C	1.352 µS/cm	Grab 01		M500	
02 Mar 2022 13:42:55	Sample 01	Sample	Grab	2	125 ppb	73.8 ppb	199 ppb	1.300 µS/cm	25.0 °C	1.353 µS/cm	Grab 01		M500	
02 Mar 2022 13:11:00	Sample 1	Sample	Averaged	1	397 ppb	113 ppb	510 ppb	54.61 µS/cm	25.0 °C	54.61 µS/cm			M500	
02 Mar 2022 12:39:05	Sample 1	Sample	Averaged	1	411 ppb	123 ppb	534 ppb	53.44 µS/cm	25.0 °C	53.44 µS/cm			M500	
02 Mar 2022 12:36:05	Sample 1	Sample	Averaged	1	418 ppb	126 ppb	544 ppb	54.35 µS/cm	25.0 °C	54.35 µS/cm			M500	
02 Mar 2022 12:33:05	Sample 1	Sample	Averaged	1	427 ppb	126 ppb	553 ppb	52.55 µS/cm	25.0 °C	52.55 µS/cm			M500	
02 Mar 2022 12:30:05	Sample 1	Sample	Averaged	1	455 ppb	129 ppb	584 ppb	52.75 µS/cm	25.0 °C	52.75 µS/cm			M500	
02 Mar 2022 12:27:06	Sample 1	Sample	Averaged	1	499 ppb	129 ppb	628 ppb	58.88 µS/cm	25.0 °C	58.88 µS/cm			M500	
02 Mar 2022 12:24:05	Sample 1	Sample	Averaged	1	534 ppb	138 ppb	672 ppb	56.66 µS/cm	25.0 °C	56.66 µS/cm			M500	
02 Mar 2022 12:21:05	Sample 1	Sample	Averaged	1	604 ppb	144 ppb	748 ppb	54.01 µS/cm	25.0 °C	54.01 µS/cm			M500	
02 Mar 2022 12:18:05	Sample 1	Sample	Averaged	1	602 ppb	141 ppb	743 ppb	52.69 µS/cm	25.0 °C	52.69 µS/cm			M500	
02 Mar 2022 12:15:05	Sample 1	Sample	Averaged	1	578 ppb	132 ppb	710 ppb	58.79 µS/cm	25.0 °C	58.79 µS/cm			M500	
02 Mar 2022 12:12:06	Sample 1	Sample	Averaged	1	527 ppb	128 ppb	655 ppb	58.39 µS/cm	25.0 °C	58.39 µS/cm			M500	
02 Mar 2022 12:11:00	Sample 1	Sample	Averaged	1	413 ppb	118 ppb	531 ppb	53.93 µS/cm	25.0 °C	53.93 µS/cm			M500	
02 Mar 2022 11:41:00	Sample 1	Sample	Averaged	1	387 ppb	106 ppb	493 ppb	54.27 µS/cm	25.0 °C	54.27 µS/cm			M500	
02 Mar 2022 11:04:00	Sample 1	Sample	Timed	1	383 ppb	109 ppb	492 ppb	51.81 µS/cm	25.0 °C	51.81 µS/cm			M500	
02 Mar 2022 10:34:00	Sample 1	Sample	Timed	1	370 ppb	109 ppb	479 ppb	54.50 µS/cm	25.0 °C	54.50 µS/cm			M500	
02 Mar 2022 10:04:00	Sample 1	Sample	Timed	1	371 ppb	122 ppb	493 ppb	53.31 µS/cm	25.0 °C	53.31 µS/cm			M500	
02 Mar 2022 09:27:07	Sample 1	Sample	Online	1	1.51 ppb	0.34 ppb	1.85 ppb	0.576 µS/cm	26.3 °C	0.586 uS/cm			M500	

**2.** Click the *Filter*  $\nabla$  icon to narrow the scope of the results data to be reported. See <u>"Filtering Results Data" on page 104</u> for guidance.



Reports larger than 5,000 records cannot be printed or exported to PDF. They can only be exported as .txt, .xlsx, and .csv.

**3.** Click the **Create Report** button. The *Create Sample* (or Protocol) *Report* dialog box appears:

Create Sample Resu	lts Report		,,,,,,	×
New Sample Res	sults Report			
Report Name	Sample_Resu	ults_Report_2024-06-21		
ltems	208			
Filters				
		Create Report	Cancel	

4. Review the *Report Name* (this field is editable), *Items* (the number of records in the report), and *Filters*, then click **Create Report**. The *Sample (or Protocol) Results* screen displays the *Reports* tab.

<b>Data Hi</b> مہم Sample R	story esults													90
Samples	eports													
Filter														
Reports Timestamp	Report Name	Sample	s Create	ed By	R	eviewed Ap	proved Signate	ures						
21 Jun 2024 09:47:5	7 Sample_Results_Report_2024-06-2	21 208	Super	r User										
21 Jun 2024 09:38:5	6 Sample_Results_Report_2024-06-2	208	Super	r User										
Graph	Export	Print									Review	Signatures	٩ _ 1.	/1
Graph Sample Results Replicate Date/Tin	- Sample, Result, Report_2024-06-21 - Sample Name	Print	Rep #	тос	IC	тс	rCond	Temp	tCond	Sample Mode	Review	Signatures Analyzer Name	Analyzer Type	/ 1
Graph Sample Results Replicate Date/Tim 02 Mar 2022 13:48:	Sample, Results, Report     Sample Name     Sample 01	Print Sample Type Sample	Rep #	<b>ТОС</b> 120 ррb	<b>IC</b> 75.7 ррb	<b>тс</b> 196 ррb	rCond 1.301 µS/cm	<b>Temp</b> 25.0 *C	tCond 1.354 μS/cm	Sample Mode Grab	Review Protocol Name Grab 01	Signatures Analyzer Name 	Analyzer Type MS00	/ 1 I Anal
Graph Sample Results Replicate Date/Tin 02 Mar 2022 13:45: 02 Mar 2022 13:45:	Export     Sample, Besuits Report, 2024-06-21     Sample Name     Sample 01     Sample 01	Print Sample Type Sample Sample	Rep # 4 3	<b>TOC</b> 120 ppb 126 ppb	IС 75.7 ррб 75.6 ррб	тс 196 ррb 202 ррb	r <b>Cond</b> 1.301 µS/cm 1.299 µS/cm	Temp 25.0 °C 25.0 °C	t <b>Cond</b> 1.354 µS/cm 1.352 µS/cm	Sample Mode Grab Grab	Protocol Name Grab 01 Grab 01	Signatures Analyzer Name	Analyzer Type M500 M500	/ 1 Ana
Graph Sample Results Replicate Date/Tin 02 Mar 2022 1345 02 Mar 2022 1345	Export           - Sample, Result, Report, 2024-06-21           Sample Name           5 Sample 01           5 Sample 01	Print_ Sample Type Sample Sample Sample	Rep #           4           3           2	<b>TOC</b> 120 ppb 126 ppb 125 ppb	IC 75.7 ppb 75.6 ppb 73.8 ppb	<b>TC</b> 196 ppb 202 ppb 199 ppb	rCond 1.301 µS/cm 1.299 µS/cm 1.300 µS/cm	Temp 25.0 °C 25.0 °C 25.0 °C	t <b>Cond</b> 1.354 µ.S/cm 1.352 µ.S/cm 1.353 µ.S/cm	Sample Mode Grab Grab Grab	Protocol Name Grab 01 Grab 01 Grab 01	Signatures Analyzer Name  	Analyzer Type MS00 MS00 MS00	/ 1
Craph Sample Results Replicate Date/Tin 02 Mar 2022 1348: 02 Mar 2022 1348: 02 Mar 2022 1347:	Export     Sample, Results, Report, 2024-06-21     Sample 01     Sample 01     Sample 01     Sample 1     Sample 1	Print Sample Type Sample Sample Sample Sample	Rep #           4           3           2           1	<b>TOC</b> 120 ppb 126 ppb 125 ppb 397 ppb	IC 75.7 ppb 75.6 ppb 73.8 ppb 113 ppb	<b>TC</b> 196 ppb 202 ppb 199 ppb 510 ppb	rCond 1.301 µS/cm 1.299 µS/cm 1.300 µS/cm 5461 µS/cm	Temp 25.0 °C 25.0 °C 25.0 °C 25.0 °C 25.0 °C	t <b>Cond</b> 1.354 µS/cm 1.352 µS/cm 1.353 µS/cm 54.61 µS/cm	Sample Mode Grab Grab Grab	Protocol Name Grab 01 Grab 01 Grab 01 Grab 01 Grab 01	Signatures Analyzer Name	Analyzer Type           M500           M500           M500	/ 1

**5.** From here, you can select the report from the list and follow the signature workflow detailed in <u>"Working with Electronic Signatures" on page 137</u>.

You can also graph, print, and export the data as detailed in <u>"Graphing Results Data"</u> on page 110 and <u>"Printing and Exporting Results Data" on page 125</u>.

# **WORKING WITH ELECTRONIC SIGNATURES**

#### (DataGuard-Enabled Systems Only)

DataShare Elite allows users with the appropriate permission to electronically sign a protocol results record.

When you sign the record, DataShare Elite requires a reason and allows you to add an optional comment. DataShare Elite can be configured to require a comment. For more information, see the *Require Signature Comments* option in <u>"To configure security settings" on page 74</u>

Electronic signatures that have been added to protocol results are available for review on the four tabs of the *Protocol Results* screen. To filter protocol results by electronic signatures, see <u>"To filter results data" on page 105</u>

Electronic signatures are included with exported and printed protocol results. One of the DataShare Elite settings places the following text on *Signature* lines: *[Electronically Signed by Name]* where *Name* is the name of the user who signed the protocol result. Another DataShare Elite setting places the following text on blank *Comments* lines: *[No comment entered]*. The settings have no effect on signatures displayed by clicking the **Signatures** button. For more information, see <u>"To configure print options" on page 22</u>

This section contains the following procedures:

- <u>"To sign reports electronically" on page 138</u>
- <u>"To review electronic signatures" on page 140</u>

### To sign reports electronically

Use this procedure to add an electronic signature and the reason for the signature to a selected protocol, sample, or audit trail report. Adding a comment is optional unless DataGuard is configured to require comments.



The following procedure uses Protocol Results as an example. The same actions can be performed on Sample Results and Audit Trail Reports as well.

 Navigate to the protocol result and select it. For example if you want to sign the result of a validation protocol, click the *Data History* نومه icon and select the *Protocol Results* menu option. Click the *Validations* tab. In the *Validations* table, find the protocol that you want to sign, and select it.

≣	محمه Data Histo Protocol Re	ory sults													
-0.0	User Protocols	Calibrations	Verifications	Validation	IS										
0-0-	<b>Filter</b>														*
Se .	Validations														
<u> </u>	Timestamp	Protocol Na	ime		Analyzer Name	Analyzer	Туре	Analyzer S/N	Review	ed Approv	ed Signatures				
A	04 Oct 2018 19:16:00	Robustness				500	RL	5292							
•	05 Oct 2018 14:17:00	Robustness				500	RL	5292							
	22 Jun 2021 09:29:56	Sample Con	ductivity Linearity		M500 - Lab 2	M5	00	1234	√	√	Test Superu	ser, Rosario Lopez			
1	26 Aug 2021 08:56:00	SDBS Suitab	oility			500	RL	5292							
215	07 Sep 2021 16:49:00	Robustness				500	RL	5292							
U	08 Sep 2021 13:00:00	Specificity				500	RL	5292							
	Graph		Export		Print								Review	Signatures	Summary
	Replicate Date/Time	SDBS Suitabili	sample Name	Sample Type	Sample Mod	e Step	# Rep	"	тос	ю	тс				*
	26 Aug 2021 09:41:02		Rw	Blank		1	6 of	8	120 ppb	256 ppb	376 ppb				
	26 Aug 2021 09:47:02						7		120 ppb	256 ppb	376 ppb				
	26 Aug 2021 09:53:02						8		121 ppb	256 ppb	377 ppb				
								Average:	120 ppb						
								Std Dev:							
								RSD:							
	26 Aug 2021 10:38:24		500 ppb SDBS	TOC Validati	on	2	4 of	6	121 ppb	258 ppb	379 ppb				

Figure 5-21: Validation protocol results to be signed

Click the Review... button or Approve... button, depending on the status of the selected protocol (Figure 5-21 shows an SDBS Suitability validation protocol that needs to be reviewed). The Review Protocol Result dialog box (Figure 5-22 on page 139) appears (if the result was previously reviewed but needed approval, this would be the Approve Protocol Result dialog box).

SDBS Suitability	
Workflow	
Reviews (0 / 1)	
Approvals (0 / 1)	
Action: Review Protocol Result	
Remission: Sign Validation Posult	
Password	
Reason	
Reviewed Result	•
Comments	

Figure 5-22: Review Protocol Result dialog box

The dialog box displays the Workflow status (whether it has been reviewed and approved), the current Action needed (*Review Protocol Result*), and the permission required for signing (*Sign Validation Result*). Users must have that permission as part of their assigned role in order to sign the results file. For more information, refer to <u>"Managing User Roles" on page 52</u>

- **3.** Complete the following:
  - User ID—The Preserve User ID From Last Signature DataGuard configuration setting pre-populates the User ID field while you are logged in to DataShare Elite. For more information, see <u>"Configuring DataGuard Security Settings" on page 73</u>.
  - Password
  - Reason (optional)—DataShare Elite will accept any reason with 25 or fewer characters. The reasons supplied by DataGuard when it is enabled on the DataShare Elite software are: *Reviewed Result, Approved Result, Rejected Result,* and Other (other custom reasons can be added by users with appropriate permissions).
  - Comments (optional)—Comments are optional unless DataGuard has been configured to require them. For more information, see <u>"Configuring DataGuard</u> <u>Security Settings" on page 73</u>.
- 4. Click the OK button. Your signature appears in the Signatures column for the protocol result. If the requisite Review and Approve signatures have been completed, the box will be checked in the Reviewed and/or Approved columns.

≣	ممرمه Data History Protocol Results											
مہ	User Protocols	Calibrations Verifications	Validations									
	<b>Filter</b>											
×.	Validations											
Ľ.	Timestamp	Protocol Name	Analyzer Name	Analyzer Type	Analyzer S/N	Reviewed	Approved	1 Signatures				
۵	04 Oct 2018 19:16:00	Robustness		500RL	5292							
1	05 Oct 2018 14:17:00	Robustness		500RL	5292							
	22 Jun 2021 09:29:56	Sample Conductivity Linearity	M500 - Lab 2	M500	1234	√	√	Test Superuser, Rosario Lopez				
1	26 Aug 2021 08:56:00	SDBS Suitability		500RL	5292	$\checkmark$		Rosario Lopez				
215	07 Sep 2021 16:49:00	Robustness		500RL	5292							
U	08 Sep 2021 13:00:00	Specificity		500RL	5292							

Signatures (users' names, signature dates, reasons, and comments) appear in exported and printed reports and are recorded in the DataShare Elite audit trail. For more information, see <u>"Working with the Audit Trail (DataGuard Only)" on page 152</u>.

**5.** To review all the signatures that have been applied to a report, continue to <u>"To review</u> <u>electronic signatures"</u>

### To review electronic signatures

Use this procedure to review the electronic signatures added to a selected report.



The following procedure uses Protocol Results as an example. The same actions can be performed on Sample Results and Audit Trail Reports as well.

 Navigate to the protocol result and select it. For example if you want to review the signatures added to the result of a calibration protocol, click the *Data History* icon and select the *Protocol Results* menu option. Click the *Validations* tab. In the *Validations* table, find the protocol that you want to review, and select it.

	~	<b>Data Hist</b> Protocol Re	ory sults								
-0.0	_	User Protocols	Calibrations	Verifications	Validation	s					
•••		<b>V</b> Filter									
×	,	/alidations									
		Timestamp	Protocol Name			Analyzer Name	Analyzer Type	Analyzer S/N	Reviewed	Approved	l Signatures
A		04 Oct 2018 19:16:00	Robustness				500RL	5292			
•		05 Oct 2018 14:17:00	Robustness				500RL	5292			
•		22 Jun 2021 09:29:56	Sample Conduc	ctivity Linearity		M500 - Lab 2	M500	1234	$\checkmark$	1	Test Superuser, Rosario Lopez
1		26 Aug 2021 08:56:00	SDBS Suitability	/			500RL	5292	$\checkmark$		Rosario Lopez
		07 Sep 2021 16:49:00	Robustness				500RL	5292			
U		08 Sep 2021 13:00:00	Specificity				500RL	5292			

2. Click the **Signatures** button. The *Signatures* dialog box appears.

**NOTE:** The **Signatures** button is active only when the results contain one or more electronic signatures.

Signatures				×
SDBS Suit	ability			
Name	Rosario Lopez	Date	07 May 2024 14:43:59	-
Reason	Reviewed Result	Workflow	Review	-
Comment	<u>N/A</u>			
			ОК	

The dialog box displays the name of the protocol results, the user name of the signer, the date and time on which the protocol result was signed, the reason for the signature, and any comment added to the signature. If two or more users have signed the protocol result, all signatures are displayed in the dialog box.

3. Click the **OK** button to close the window.

### Manual Signature Block Option

DataShare Elite has a configuration option that automatically adds a manual signature block to the end of any printed and/or saved protocol results report, as Figure 5-19 on page 129 shows. DataGuard does not need to be enabled to use the manual signature block option. For more information about adding a manual signature block, see <u>"To configure print options" on page 22</u>

# CHAPTER 6: MANAGING DATA

Managing DataShare Elite data involves backing up and restoring the active DataShare Elite database as well as archiving older data to keep the database from becoming too large. For information about archiving data, see <u>"To archive data in the database" on page 145</u>.



**NOTE:** If you are using SQL Server Express, the DataShare Elite database cannot exceed 10 GB.

After data is archived, it no longer can be restored to the active DataShare Elite database. Archived data can be viewed separately on *Data History* screens (*Sample Results* and the four tabs of *Protocol Results*), *Errors* screens (*Analyzers* and *DataShare Elite*), and — if DataGuard is enabled — *Audit Trail* screens (*Analyzers, DataPro2,* and *DataShare Elite*). For more information, see <u>"To view an archive file" on page 102</u>.

You can always back up the database or archive data manually. In addition, you can configure DataShare Elite to back up the database and archive data automatically.

Users perform all the DataShare Elite database management functions on the Database screen.

This chapter discusses:

- <u>"Database Screen" on page 143</u>
- <u>"Manual Data Management" on page 144</u>
- <u>"Automatic Data Management" on page 148</u>
- "Working with the Audit Trail (DataGuard Only)" on page 152
- <u>"Working with Data about Errors" on page 177</u>

# DATABASE SCREEN

On the *Database* screen (click the *Management icon* and select *Database* on the *Management* menu), a user with appropriate privileges can:

- Back up and restore the active DataShare Elite database
- Remove older data from the active DataShare Elite database by archiving it to a computer or network
- Configure DataShare Elite to back up the database and archive data automatically

Figure 6-1 shows the *Database* screen before the first backup. The current size of the database appears near the top of the screen.

≣	Management Database						
~~	Archive			Backup			
×	Last Archive	Oldest Record In Database 02 Jun 2021 17:01:00	Database Size 80.0 MB	Last Backup			
A	Archive Folder			Backup Folder:			
i	Backup Folder			Auto Backup Enabled			
- (1)	Auto Archive Enabled			Backup Every (Days)	30		
	Archive Every (Days)	60		Start on 5/6/2024			
	Start on 5/6/2024			Run at 00:00			
	Run at 00:00						
	Data Older Than (Days)						
			_				
	Backup	Restore Archive			1	Save	Revert

#### Current size of database

Backup, Restore, and Archive

#### Figure 6-1: Database Screen

# **MANUAL DATA MANAGEMENT**

This section contains the following procedures:

- <u>"To back up the database"</u>
- <u>"To archive data in the database" on page 145</u>
- <u>"To restore the database" on page 147</u>

### To back up the database

This procedure allows the user to manually back up the current active DataShare Elite database as a regular safety measure as well as before a firmware upgrade or an expected system shutdown. Backing up also can be done automatically. To configure settings for automatic backups, see <u>"To automatically back up the database and archive data" on page 148</u>

- 2. Click the **Backup...** button. The Select Backup Folder dialog box appears.
- **3.** Navigate to the folder for DataShare Elite backups, highlight it, and click the **Select Folder** button.

DataShare Elite places a copy of the database in the selected folder. A progress bar appears while DataShare Elite processes the backup. When the backup is complete, a *Database backup successful* message appears.

4. Click the **OK** button.
### To archive data in the database

This procedure allows the user to manually remove older data from the active DataShare Elite database according to the date selected on the *Configure Archive* dialog box. After the data is archived to a folder on a computer or network, the data can no longer be restored, but the data in the archive file can be viewed on *Data History* or screens (*Sample Results* and the four tabs of *Protocol Results*), *Errors* screens (*Analyzers* and *DataShare Elite*), and — if DataGuard is enabled — *Audit Trail* screens (*Analyzers, DataPro2,* and *DataShare Elite*). Before DataShare Elite runs the archive, it backs up the database.

When you archive data, DataShare Elite archives all data: sample results, protocol results, error history, and — if DataGuard is enabled — audit trail data. You cannot remove specific kinds of data (for example, error history or audit trail data) before you archive data.

Archiving can be done automatically. To configure settings for automatic archives, see <u>"To</u> automatically back up the database and archive data" on page 148

- 2. Click the Archive... button. The Configure Archive dialog box appears.

Configure Archive		×
Archive Options		
Archive Folder:	C:\Users\sievers\Documents	
Backup Folder:	C:\Users\sievers\Documents	
Archive Data Prior To:	3/7/2024	
	Archive	

- 3. Click the Folder icon next to the Archive Folder: dialog box. The Select Folders for Backup and Archive dialog box appears.
- **4.** Navigate to the folder for DataShare Elite archives, highlight it, and click the **Select Folder** button. The *Configure Archive* dialog box reappears.
- 5. Click the Folder icon next to the Backup Folder: dialog box. The Select Folders for Backup and Archive dialog box reappears.
- 6. Navigate to the folder for DataShare Elite backups, highlight it, and click the **Select Folder** button. The *Configure Archive* dialog box reappears.

7. In the Archive Data Prior To: field, specify the earliest date for which you want to keep data in the DataShare Elite database. For example, specify 8/16/2020 if you want to archive data for 8/15/2020 and all previous dates. Data for 8/16/2020 and all following dates will remain in the database.

To specify the date, you can:

- Type the date in the Archive Data Prior To: field.
- Select the date by clicking the *Calendar* 15 icon next to the date field.



Click the day you want, or use the **Previous**  $\blacksquare$  and **Next**  $\triangleright$  buttons to navigate to the month and year, then click the day before which to backup and archive the data.

- 8. Click **Archive**. DataShare Elite backs up the entire database to the selected backup folder. DataShare Elite then writes all data older than the date specified to the archive file and removes that data from the database. A progress bar appears while DataShare Elite backs up the database and processes the archive. When the archive is complete, an *Archive successful* message appears.
- 9. Click the OK button.

### To restore the database

This procedure overwrites the active DataShare Elite database with a previous database backed up on the computer or network. When a restore is performed, it automatically creates a backup of the active database to prevent any data from being destroyed.

- 2. Click Restore.... The Configure Restore dialog box appears.

Configure Restore	×	
<b>Restore Options</b>		
Restore File:	Q ta\TestDataFiles\M500_v1.00\M500_1234_2021_06_11_15_53_29.bak	
Backup Folder:	C:\Users\sievers\Documents\DSE Data\Backup files	
	Restore Cancel	

- **3.** Click the *Search* icon next to the *Restore File:* dialog box. The *Select Backup File to Restore* dialog box appears.
- **4.** Navigate to the backup file that you want to restore, highlight it, and click **Open**. The *Configure Restore* dialog box reappears.
- 5. Click the *Folder* icon next to the *Backup Folder:* dialog box. The *Select Backup Folder* dialog box appears.
- 6. Navigate to the folder for DataShare Elite backups, highlight it, and click **Select Folder**. The *Configure Restore* dialog box appears again.
- 7. Click Restore. DataShare Elite backs up the entire database to the selected backup folder. DataShare Elite then writes the data in the selected backup file over the data in the current active DataShare Elite database. A progress bar appears while DataShare Elite backs up the database and processes the restore. When the restore is complete, a *Restore successful* message appears.
- 8. Click the **OK** button.

# **AUTOMATIC DATA MANAGEMENT**

This section contains the following procedures:

- <u>"To automatically back up the database and archive data" on page 148</u>
- <u>"To automatically back up the database" on page 151</u>



**NOTE:** The options to automatically back up the database and to automatically archive data are available only on local installations of DataShare Elite.

# To automatically back up the database and archive data

This procedure allows the user to automatically remove data older than a specified number of days from the active DataShare Elite database. After the data is archived to a folder on a computer or network, the data can no longer be restored, but the data in the archive file can be viewed on *Data History* or screens (*Sample Results* and the four tabs of *Protocol Results*), *Errors* screens (*Analyzers* and *DataShare Elite*), and — if DataGuard is enabled — *Audit Trail* screens (*Analyzers, DataPro2*, and *DataShare Elite*). Before DataShare Elite runs the archive, it backs up the database.

When you archive data, DataShare Elite archives all data: sample results, protocol results, error history, and — if DataGuard is enabled — audit trail data. You cannot remove specific kinds of data (for example, error history or audit trail data) before you archive data.

Archive	Backup
Last Archive Oldest Record in Database Database Size	Last Backup 01/30/2024 16:25:55
Archive Folder	Backup Folder:
C\DSE\Issues	C:\DSE\Issues
Backup Folder	Auto Backup Enabled
	Backup Every (Days)
Auto Archive Enabled	30
60	3/4/2024
Start on	Run at
3/4/2024	00.00
Run at	
Data Older Than (Davs)	
60	
•	Archive Last Archive Cldest Record In Database Size 3360 MB Archive Fodder CCSSEVssues Backup Folder CCSSEVssues C Auto Archive Enabled Archive Every (Days) 60 Start on 34/2024 Run at 6000 Data Older Than (Days) 60

Figure 6-2: Database Screen with Auto Archive and Auto Backup Enabled

a - Oldest record in	b - Date of most	c - Auto-archive	d - Auto-backup
database	recent backup	options	options

- 2. In the Archive area of the Database screen, click the Folder icon next to the Archive Folder field to select the folder in which DataShare Elite will place the automatic archive files that it creates. The Select Folders for Backup and Archive dialog box appears.
- **3.** Navigate to the folder for automatic archives, highlight it, and click the **Select Folder** button. DataShare Elite puts the directory path to the folder in the *Archive Folder* field on the *Database* screen.
- 4. Click the *Folder* icon next to the *Backup Folder* field to select the folder in which DataShare Elite will place the automatic backup files that it creates during the archive process. The *Select Folders for Backup and Archive* dialog box reappears.
- 5. Navigate to the folder for automatic backups during the archive process, highlight it, and click the **Select Folder** button. DataShare Elite puts the directory path to the folder in the *Backup Folder* field in the *Archive* area of the *Database* screen.
- 6. Select (check mark) the Auto Archive Enabled option.
- 7. In the *Archive Every* field, type the number of days in the interval between automatic archives.

8. In the *Start on* field, specify the date on which DataShare Elite will run the first automatic archive. If you specify a date in the past, DataShare Elite will wait for the number of days specified in the *Archive Every* field before running the first automatic archive.

To specify the date, you can:

- Type the date in the *Start on* field.
- Select the date by clicking the *Calendar* 15 icon next to the date field.

Start On (current PC location date)									
	5/23	/202	4						
Run	•	<ul> <li>May 2024</li> </ul>							
00:	Su	Мо	Tu	We	Th	Fr	Sa		
	28	29	30	1	2	3	4		
	5	6	7	8	9	10	11		
	12	13	14	15	16	17	18		
	19	20	21	22	23	24	25		
	26	27	28	29	30	31	1		
	2	3	4	5	6	7	8		

Click the day you want, or use the **Previous** A and **Next** buttons to navigate to the month and year, then click the day you want.

- **9.** Type the time of the automatic archive in the *Run at* field. Use 24-hour time. For example, to run the automatic archive at 11:00 pm, type *23:00*.
- **10.** In the *Data Older Than* field, type the age in days of the data to be removed from the active DataShare Elite database and archived. For example, to archive data older than 60 days, type *60*. The minimum age of data to be removed is 15 days.
- **11.** Click the **Save** button. If you do not want to save your changes to automatic archive options, click the **Revert** button to restore the values prior to your changes.



**NOTE:** After you enable the automatic Archive function, the manual Archive function will default to the Archive folder and Backup folder that you specified for the automatic Archive. The Archive Data Prior To date will default to a date determined by the value that you specified in the Data Older Than field for the

automatic Archive. For example, if today's date is 10/15/2020, and you specified 60 days in the Data Older Than field, the default date in the Archive Data Prior To field will be 8/16/2020. To perform a manual data archive, see <u>"To archive data in the database"</u> on page 145

### To automatically back up the database

A back up stores the data in a file on your computer or network but does not remove the data from DataShare Elite.

- In the Backup area of the Database screen, click the Folder icon next to the Backup Folder field to select the folder in which DataShare Elite will place the automatic backup files that it creates. The Select Backup Folder dialog box appears.
- **3.** Navigate to the folder for automatic backups, highlight it, and click **Select Folder**. DataShare Elite puts the directory path to the folder in the *Backup Folder* field in the *Backup* area of the *Database* screen.
- 4. Select (check mark) the Auto Backup Enabled option. See Figure 6-2 on page 149.
- 5. In the *Backup Every* field, type the number of days in the interval between automatic backups.
- 6. In the *Start on* field, specify the date on which DataShare Elite will run the first automatic backup. If you specify a date in the past, DataShare Elite will wait for the number of days specified in the *Backup Every* field before running the first automatic backup.

To specify the date, you can:

- Type the date in the Start on field.
- Select the date by clicking the *Calendar* 15 icon next to the date field.



Click the day you want, or use the **Previous**  $\blacksquare$  and **Next**  $\blacktriangleright$  buttons to navigate to the month and year, then click the day you want.

7. Type the time of the automatic backup in the *Run at* field. Use 24-hour time. For example, to run the automatic backup at 11:00 pm, type *23:00*.



**NOTE:** To avoid potential errors in backing up the database, ensure that the time of the first automatic backup is at least 15 minutes in the future.

8. Click the **Save** button. If you do not want to save your changes to automatic backup options, click the **Revert** button to restore the values prior to your changes.

# WORKING WITH THE AUDIT TRAIL (DATAGUARD ONLY)

An audit trail is a chronology of events that describes when each user creates, modifies, or deletes data. Each audit trail entry details what event was performed, when the event was performed, and the User ID (DataGuard Signature) of the person who performed the operation. The audit trail also details failed attempts to create users.

When DataGuard is enabled, DataShare Elite contains either three or four types of audit trail data, depending on whether data has been imported for DataPro2:

- Audit trail data imported into DataShare Elite for specific Analyzers (that have DataGuard enabled)
- Audit trail data for the activities of DataShare Elite users
- Audit trail data that has been imported into DataShare Elite for DataPro2
- Audit trail reports that have been created to allow for electronic review and signature

In addition to working with audit trail data in the active DataShare Elite database, you can work with archived audit trail data. For more information, see <u>"Viewing Archived Audit Trail Data" on page 177</u>.

This section contains the following procedures:

- <u>"To display audit trail data for Analyzers" on page 153</u>
- <u>"To display audit trail data for DataPro2" on page 154</u>
- <u>"To display audit trail data for DataShare Elite" on page 156</u>
- <u>"To filter audit trail data" on page 157</u>
- <u>"To print audit trail data or save it to a file" on page 173</u>
- <u>"To export audit trail data" on page 174</u>
- <u>"To create an audit trail report that can be signed electronically" on page 176</u>

# To display audit trail data for Analyzers

- 1. Click the *DataGuard* icon and select *Audit Trail* on the *DataGuard* menu. The *Audit Trail* screen appears.
- 2. Click the Analyzers tab. Figure 6-3 shows the Analyzers tab on the Audit Trail screen.

0	Audit Trail								
Ana	lyzers DataShare Elite	Reports							
	ilter								
Review	ved Timestamp	Analyzer Name	Analyzer Type	Analyzer S/N	Event Code	Event	Old Value	New Value	Signature
	04 Jun 2021 17:03:41	M9 - Lab 1	M9	0006	198	Export Audit Trail			TEST, NINE
	04 Jun 2021 17:03:01	M9 - Lab 1	M9	0006	223	Export Validation History			TEST, NINE
	04 Jun 2021 17:01:50	M9 - Lab 1	M9	0006	222	Export Verification History			TEST, NINE
	04 Jun 2021 16:59:47	M9 - Lab 1	M9	0006	221	Export Calibration History			TEST, NINE
	04 Jun 2021 16:59:38	M9 - Lab 1	M9	0006	226	Export Diagnostics			TEST, NINE
	04 Jun 2021 16:58:08	M9 - Lab 1	M9	0006	153	Backup System Settings			TEST, NINE
	04 Jun 2021 16:58:00	M9 - Lab 1	M9	0006	148	Backup Database			TEST, NINE
	04 Jun 2021 16:57:50	M9 - Lab 1	M9	0006	340	Start Database Backup			TEST, NINE
	04 Jun 2021 12:29:10	M9 - Lab 1	M9	0006	39	Turbo Single Point Verification Complete			TEST, NINE
	04 Jun 2021 12:28:28	M9 - Lab 1	M9	0006	222	Export Verification History			TEST, NINE
	04 Jun 2021 12:28:07	M9 - Lab 1	M9	0006	211	Vial Completed			TEST, NINE
	04 Jun 2021 12:16:55	M9 - Lab 1	M9	0006	211	Vial Completed			TEST, NINE
	04 Jun 2021 12:05:44	M9 - Lab 1	M9	0006	211	Vial Completed			TEST, NINE
	04 Jun 2021 11:54:41	M9 - Lab 1	M9	0006	38	Start Turbo Single Point Verification			TEST, NINE
	04 Jun 2021 11:54:33	M9 - Lab 1	M9	0006	40	Cancel Turbo Single Point Verification			TEST, NINE
	04 Jun 2021 11:54:19	M9 - Lab 1	M9	0006	211	Vial Completed			TEST, NINE
	04 Jun 2021 11:43:08	M9 - Lab 1	M9	0006	211	Vial Completed			TEST, NINE
	04 Jun 2021 11:31:00	M9 - Lab 1	M9	0006	38	Start Turbo Single Point Verification			TEST, NINE
	04 Jun 2021 11:30:52	M9 - Lab 1	M9	0006	40	Cancel Turbo Single Point Verification			TEST, NINE
						ALC: 1. ALC: 1			

Figure 6-3: Analyzers Tab on Audit Trail Screen

The Analyzers tab on the Audit Trail screen contains a table of imported audit trail records for specific Analyzers. Six of the column headings always appear: *Timestamp, Event Code, Event, Old Value, New Value,* and *Signature.* The other column headings (for example: *Analyzer Type, Analyzer S/N,* and *Location*) are set by selecting options in the *Application Display* area of the *Displayed Data* screen. For more information, see <u>"To configure the data displayed in the DataShare Elite application" on page 26</u>.

DataShare Elite loads audit trail data into the display area 100 records at a time. Each set of 100 records is a "page." If the active DataShare Elite database has 773 records for audit trail data and the display shows the first 100 records, the page control in the lower right corner of the screen shows 1/8.

**3.** Drag the vertical scroll bar (located on the right of the table) down and up to navigate through the records on a page.

A horizontal scroll bar may also appear (depending upon the width of the *Analyzers* tab on the *Audit Trail* screen and the number of columns displayed.

- 4. To navigate through the pages, do one of the following:
  - Click the Next **>** button or the Previous **<** button.
  - Type a number in the page number field and press Enter.

A horizontal scroll bar may also appear (depending upon the width of the *Audit Trail* screen and the number of columns displayed.

- **5.** You can sort the data in ascending or descending order by clicking a column heading, such as *Timestamp, Analyzer Type, Analyzer S/N, Analyzer Type,* and *Event Code.* You cannot sort the data by *Event, Old Value, New Value, Signature,* or *Location.*
- 6. To limit the number of records displayed on the *Audit Trail* screen, filter the data by specific categories. Refer to <u>"Filtering Audit Trail Data" on page 157</u> for instructions.

# To display audit trail data for DataPro2

The DataPro2 tab appears on the *Audit Trail* screen only when audit trail data from DataPro2 has been imported into DataShare Elite.

- 1. Click the *DataGuard* ficon and select *Audit Trail* on the *DataGuard* menu. The *Audit Trail* screen appears.
- 2. Click the DataPro2 tab. Figure 6-4 shows the DataPro2 tab on the Audit Trail screen.

III	A Da	<b>taGuard</b> dit Trail						
-0.0	Analyze	rs DataPro2	DataShare Elite	Reports				
• •	<b>Filter</b>							
×	Reviewed	Timestamp	Event Code	Event	Details	Old Value	New Value	Signature
		02/29/2024 13:51:38	175	Run System Protocol	System Suitability			
A		02/27/2024 16:02:41	221	Reject System Protocol	1 ppm Single Point Calibration			
		02/27/2024 15:58:15	175	Run System Protocol	1 ppm Single Point Calibration			
i		02/27/2024 14:22:10	251	Modify Stack Protocol	Stacked protocol			
-		02/27/2024 14:19:09	251	Modify Stack Protocol	Stacked protocol			
da		02/27/2024 14:18:28	250	Create Stack Protocol			Stacked protocol	
	Ē	port_	Print.,					Create Report_

Figure 6-4: DataPro2 Tab on Audit Trail Screen

The *DataPro2* tab on the *Audit Trail* screen contains a table of audit trail records for DataPro2. You cannot set options to display different headings on *DataShare Elite* tab.

DataShare Elite loads audit trail data into the display area 100 records at a time. Each set of 100 records is a "page." If the active DataShare Elite database has 216 records for DataPro2 audit trail data and the display shows the first 100 records, the page control in the lower right corner of the screen shows 1/3.

**3.** Drag the vertical scroll bar (located on the right of the table) down and up to navigate through the records on a page.

A horizontal scroll bar may also appear (depending upon the width of the *DataPro2* tab on the *Audit Trail* screen and the number of columns displayed.

- **4.** To navigate through the pages, do one of the following:
  - Click the Next **>** button or the Previous **<** button.
  - Type a number in the page number field and press **Enter**.
- 5. You can sort the data in ascending or descending order by clicking the *Event, Details, Old Value, New Value, and Comments* column headings. You cannot sort the data by the other column headings.
- 6. To limit the number of records displayed on the *Audit Trail* screen, filter the data by specific categories. Refer to <u>"Filtering Audit Trail Data" on page 157</u> for instructions.

# To display audit trail data for DataShare Elite

- 1. Click the *DataGuard* icon and select *Audit Trail* on the *DataGuard* menu. The *Audit Trail* screen appears.
- 2. Click the *DataShare Elite* tab. Figure 6-5 shows the *DataShare Elite tab* on the *Audit Trail* screen.

Analyz	ers DataPro2	DataShare Elite	Reports				
Filte Reviewed	r Timestamp	Event Code	Event	Details	Old Value	New Value	Signature
	05/17/2024 13:01:42	620	Create Sample Results Report	Count: 73 Filters: TOC < 50,Analyzer S/N Contains: 0006,Sample Type = Sample		Sample_Results_Report_2024-05-17	One T
	05/17/2024 01:34:27	200	Authentication Success	Test01			One T
	05/17/2024 01:34:01	0	Application Started	DESKTOP-337RQNI			
	05/16/2024 08:48:15	200	Authentication Success	Test01			One T
	05/16/2024 08:48:10	201	Authentication Failed	Test01			One T
	05/16/2024 08:48:05	201	Authentication Failed	Test01			One 1
	05/16/2024 08:47:39	0	Application Started	DESKTOP-337RQNI			
	05/15/2024 15:30:02	1302	Change User Password	One Test			One 1
	05/15/2024 15:30:01	1302	Change User Password	One Test			One 1
	05/15/2024 15:29:39	205	Authenticated With Expired Password	Test01			One 1
	05/15/2024 15:29:09	701	Database Full Restore	C:\Users\sievers\Documents\DSE Data\Backup files \hvdsdb_backup_2024_05_15_094154.bak			Super
	05/15/2024 09:40:44	2301	Duplicate data removed	Removed 58019 duplicate Sample Results from 2023-11-25 00:50:59 -07:00 to 2024-02-21 14:52:50 -07:00			
	05/15/2024 09:40:33	2300	Duplicate data found	Found 58019 duplicate Sample Results from 2023-11-25 00:50:59 -07:00 to 2024-02-21 14:52:50 -07:00			
	05/15/2024 09:40:32	200	Authentication Success	TEST01			One 1
	05/15/2024 09:40:28	0	Application Started	W0360000CSTJ3M3			
	05/15/2024 09:40:00	604	Auto Import Device Mismatch	Device mismatch during auto import. Found analyzer M9e [65432] at IP address '205.169.165.190'. Expected analyzer M9 [00060].			
	05/15/2024 09:38:00	604	Auto Import Device Mismatch	Device mismatch during auto import. Found analyzer M9e (65432) at IP address '205 169 165 190' Expected			

Figure 6-5: DataShare Elite Tab on Audit Trail Screen

The *DataShare Elite* tab on the *Audit Trail* screen contains a table of audit trail records for DataShare Elite. DataShare Elite loads audit trail data into the display area 100 records at a time. Each set of 100 records is a page. Drag the vertical scroll bar (located on the right of the table) down and up to navigate through the records on a page, and drag the horizontal scroll bar to see additional columns.

- 3. To navigate through the pages, do one of the following:
  - Click the *Next* button or the *Previous* dutton.
  - Type a number in the page number field and press Enter.

You can sort the data in ascending or descending order by clicking the *Event, Details, Old Value, New Value, and Comments* column headings. You cannot sort the data by the other column headings.

To limit the number of records displayed on the *Audit Trail* screen, filter the data by specific categories. Refer to <u>"Filtering Audit Trail Data" on page 157</u> for instructions.

# Filtering Audit Trail Data

On the four tabs of the *Audit Trail* screen, you can filter audit trail data in the DataShare Elite database. This section includes instructions for filtering audit trail data under each of the four tabs. Click a link to view the options under a tab:

- <u>"Analyzers tab"</u>
- <u>"DataPro2 tab" on page 162</u>
- <u>"DataShare Elite tab" on page 166</u>
- <u>"Reports tab" on page 170</u>

### To filter audit trail data

Use this procedure to narrow down the displayed data from all audit trail records to a subset of the records.



The options that appear on the menu for filtering data vary based on the tab selected, and the options that have been selected in the Application Display area of the Displayed Data tab on the Settings screen.

## Analyzers tab

- 1. Click the Filter icon.
- 2. Select a filter type.
  - Timestamp
    - A. To specify a Timestamp date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears.

Timestamp			×
Filter			
Between		•	
Value 1			
5/16/2024			
Value 2			
5/17/2024			
	OK	Cancel	

B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.

C. Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value, Value 1, or Value 2 field.
- Select the date by clicking the *Calendar* 15 icon next to the *Value*, *Value* 1, or *Value* 2 field. A calendar appears.

Use the **Previous (** and **Next )** buttons to navigate to the month and year, then click the day you want.

D. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.

#### Analyzer Name

- A. To filter the data by Analyzer name, select the *Analyzer Name* filter. The *Analyzer Name* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Analyzer Name* filter is active appears next to the *Filter* icon.

#### • Analyzer S/N

- A. To filter the data by Analyzer serial number, select the *Analyzer S/N* filter. The *Analyzer S/N* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Analyzer S/N* filter is active appears next to the *Filter* icon.

### • Analyzer Type

- A. To filter the data by Analyzer type, select the *Analyzer Type* filter. The *Analyzer Type* dialog box appears.
- B. Select a *Filter* option: = (equal to) or  $\neq$  (not equal to).
- C. Select a *Value* from the list of Analyzers.
- D. When you finish, click the **OK** button. An indicator that the *Analyzer Type* filter is active appears next to the *Filter* icon.

### • Event Code

- A. To specify an event code or a range of event codes for the filtered data, select the *Event Code* filter. The *Event Code* dialog box appears.
- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a event code in the *Value* field or a range of event codes (*Value 1*, the lowest event code in the range, and *Value 2*, the highest event code in the range).
- D. When you finish, click the **OK** button. An indicator that the *Event Code* filter is active appears next to the *Filter* icon.

### • Event

- A. To filter the data by Events (named), select the *Event* filter. The *Event* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Events* filter is active appears next to the *Filter* icon.

### • Old Value

- A. To filter the data by Old Value, select the *Old Value* filter. The *Old Value* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Old Value* filter is active appears next to the *Filter* icon.

### • New Value

- A. To filter the data by New Value, select the *New Value* filter. The *New Value* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *New Value* filter is active appears next to the *Filter* icon.

### Signature

- A. To filter the data by signatures (user names), select the *Signature* filter. The *Signature* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Signature* filter is active appears next to the *Filter* icon.

### Geography

- A. To filter the data by the physical location of a data source, select the *Geography* filter and choose Location, Site, or Region from the dropdown list. The *Location, Site, or Region* dialog box appears, based on your choice.
- B. Select an option from the *Filter* list: = (equal to) or  $\neq$  (not equal to).
- C. On the Value list, select an option.
- D. When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.

### Reviewed

A. To filter the data by whether or not it has been reviewed, select the *Reviewed* filter. The *Reviewed* dialog box appears.

Reviewed		×
Filter		
=		•
Value Review Completed	1	
	ОК	Cancel

- B. The *Filter* list has a set selection: = (equal to).
- C. Select the check box for *Review Completed* if you want to see only results with completed reviews.
- D. When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.

### DataPro2 tab

- 1. Click the *Filter* icon.
- 2. Select a filter type.
  - Timestamp
    - A. To specify a Timestamp date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears.

I Timestamp			×
Filter			
Between		•	
Value 1			
5/16/2024			
Value 2			
5/17/2024			
	OK	Cancel	

- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value, Value 1, or Value 2 field.
- Select the date by clicking the *Calendar* 15 icon next to the *Value*, *Value* 1, or *Value* 2 field. A calendar appears.

Use the **Previous •** and **Next •** buttons to navigate to the month and year, then click the day you want.

D. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.

### Event Code

- A. To specify an event code or a range of event codes for the filtered data, select the *Event Code* filter. The *Event Code* dialog box appears.
- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a event code in the *Value* field or a range of event codes (*Value 1*, the lowest event code in the range, and *Value 2*, the highest event code in the range).
- D. When you finish, click the **OK** button. An indicator that the *Event Code* filter is active appears next to the *Filter* icon.
- Event
  - A. To filter the data by Events (named), select the *Event* filter. The *Event* dialog box appears.
  - B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
  - C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
  - D. When you finish, click the **OK** button. An indicator that the *Events* filter is active appears next to the *Filter* icon.
- Details
  - A. To filter the data by Details, select the *Details* filter. The *Details* dialog box appears.
  - B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
  - C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
  - D. When you finish, click the **OK** button. An indicator that the *Details* filter is active appears next to the *Filter* icon.

### • Old Value

- A. To filter the data by Old Value, select the *Old Value* filter. The *Old Value* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Old Value* filter is active appears next to the *Filter* icon.

### • New Value

- A. To filter the data by New Value, select the *New Value* filter. The *New Value* dialog box appears. If you do not want to filter the data by old value, go to the next filter type.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *New Value* filter is active appears next to the *Filter* icon.

### Signature

- A. To filter the data by signatures (user names), select the *Signature* filter. The *Signature* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Signature* filter is active appears next to the *Filter* icon.

### Comments

- A. To filter the data by comments, select the *Comments* filter. The *Comments* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Comments* filter is active appears next to the *Filter* icon.

#### Reviewed

A. To filter the data by whether or not it has been reviewed, select the *Reviewed* filter. The *Reviewed* dialog box appears. If you do not want to filter the data by its review status, go to the next filter type.

Reviewed		×
Filter		
=		•
Value     Value     Value		
	ОК	Cancel

- B. The *Filter* list has a set selection: = (equal to).
- C. Select the check box for *Review Completed* if you want to see only results with completed reviews.
- D. When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.

# DataShare Elite tab

- **1.** Click the *Filter* icon.
- 2. Select a filter type.
  - Timestamp
    - A. To specify a Timestamp date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears.

Timestamp			×
Filter			
Between		•	
Value 1			
5/16/2024			
Value 2			
5/17/2024			
	OK	Cancel	
	OK	Cancel	

- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value, Value 1, or Value 2 field.
- Select the date by clicking the *Calendar* 15 icon next to the *Value*, *Value* 1, or *Value* 2 field. A calendar appears.

Use the **Previous •** and **Next •** buttons to navigate to the month and year, then click the day you want.

D. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.

### • Event Code

- A. To specify an event code or a range of event codes for the filtered data, select the *Event Code* filter. The *Event Code* dialog box appears.
- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a event code in the *Value* field or a range of event codes (*Value 1*, the lowest event code in the range, and *Value 2*, the highest event code in the range).
- D. When you finish, click the **OK** button. An indicator that the *Event Code* filter is active appears next to the *Filter* icon.
- Event
  - A. To filter the data by Events (named), select the *Event* filter. The *Event* dialog box appears.
  - B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
  - C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
  - D. When you finish, click the **OK** button. An indicator that the *Events* filter is active appears next to the *Filter* icon.

#### Details

- A. To filter the data by Details (for example, the user who initiated the event or on which computer it occurred), select the *Details* filter. The *Details* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Details* filter is active appears next to the *Filter* icon.

### • Old Value

- A. To filter the data by Old Value, select the *Old Value* filter. The *Old Value* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Old Value* filter is active appears next to the *Filter* icon.

### • New Value

- A. To filter the data by New Value, select the *New Value* filter. The *New Value* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *New Value* filter is active appears next to the *Filter* icon.

### Signature

- A. To filter the data by signatures (user names), select the *Signature* filter. The *Signature* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Signature* filter is active appears next to the *Filter* icon.

### Comments

- A. To filter the data by comments, select the *Comments* filter. The *Comments* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Comments* filter is active appears next to the *Filter* icon.

#### Reviewed

A. To filter the data by whether or not it has been reviewed, select the *Reviewed* filter. The *Reviewed* dialog box appears. If you do not want to filter the data by its review status, go to the next filter type.

Reviewed		X
Filter		
=		•
Value Value Review Completed		
	OK	Cancel

- B. The *Filter* list has a set selection: = (equal to).
- C. Select the check box for *Review Completed* if you want to see only results with completed reviews.
- D. When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.

### **Reports tab**

- 1. Click the *Filter* icon.
- 2. Select a filter type.
  - Timestamp
    - A. To specify a Timestamp date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears.

Filter				
Betw	reen		•	
Value	1			
	5/16/2024			
Value 2				
	5/17/2024			
		ОК	Cancel	

- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value, Value 1, or Value 2 field.
- Select the date by clicking the *Calendar* 15 icon next to the *Value*, *Value* 1, or *Value* 2 field. A calendar appears.

Use the **Previous •** and **Next •** buttons to navigate to the month and year, then click the day you want.

D. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.

### Report Name

- A. To filter the data by report name, select the *Report Name* filter. The *Report Name* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Report Name* filter is active appears next to the *Filter* icon.

### • Count (Reports)

- A. To filter report data by count, select the *Count* filter. The *Count* dialog box appears.
- B. Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (after or greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (falling before or less than), *Between*, or *Not Between*.
- C. Based on the *Filter* option you selected, specify a *Value* or a range between *Value 1* and *Value 2*.
- D. When you finish, click the **OK** button. An indicator that the *Count* filter is active appears next to the *Filter* icon.

### • Created By (Reports)

- A. To filter the data by who created the report (User names), select the *Created By* filter. The *Created By* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Created By* filter is active appears next to the *Filter* icon.

### Signature

- A. To filter the data by signatures (user names), select the *Signature* filter. The *Signature* dialog box appears.
- B. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.*
- C. Specify the *Value* for filtering. When you type more than one word, all words must be in the exact sequential order. The field is **not** case sensitive.
- D. When you finish, click the **OK** button. An indicator that the *Signature* filter is active appears next to the *Filter* icon.

### • Signature Workflow (Reports)

A. To filter the data by whether or not the workflow is complete, select the *Signature Workflow* filter. The *Signature Workflow* dialog box appears.

Signature Workflow		×
Filter		
=		•
Value Value Vorkflow Comple	ete	
	ОК	Cancel

- B. The *Filter* list has a set selection: = (equal to).
- C. Select the check box for *Workflow Complete* if you want to see only results with completed workflow.
- D. When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.
- **3.** When you finish specifying values for a filter, click the **OK** button. An indicator that the filter is active appears next to the button.
- **4.** To review the values for a filter, hover over the filter. The values appear in a small text box next to the filter.
- **5.** To change the values for a filter, click its indicator. The dialog box in which you specified the values appears. Change the values and click the **OK** button.
- 6. To remove one or more filters, click the x on the right side of the filter indicator. To remove all filters, click the x on every filter indicator.

# Printing and Exporting Audit Trail Data

DataShare Elite allows you to print audit trail data. See <u>"To print audit trail data or save it</u> to a file" on page 173.

Additionally, you can export audit trail data in one or more of the following file formats: text (\*.txt), comma separated values (\*.csv), Microsoft Excel (\*.xlsx), and PDF (\*.pdf).

You can password protect exported Microsoft Excel and PDF files.

See "To export audit trail data" on page 174.

### To print audit trail data or save it to a file

1. While you are viewing data on the *Audit Trail* screen, click the **Print...** button. The *Print Preview* window appears, displaying the applied filters (Figure 6-6).



**NOTE:** Remember to filter your audit trail data before you print.

		-	-						-	
DataShare E	lite Report									
Analyzer Audit Tra	ii .									
02/16/2024 08:47:14 to 02/	05/2024 11:26:46									
Applied Filters										
Analyzer Name Contains:	CarolM9									
Timestamp	Analyzer Name	Туре	S/N	Event	Signature	Old Value	New Value	Location	Site	Region
02/16/2024 08:47:14	CarolM9	M9	00006	User Logout	TEST, ONE					
02/15/2024 08:12:41	CarolM9	M9	00006	Start Analysis	TEST, ONE		OL Test 2			
02/15/2024 08:07:40	CarolM9	M9	00006	Stop Analysis	TEST, ONE		OL Test 2			
02/13/2024 11:44:13	CarolM9	M9	00006	Start Analysis	TEST, ONE		OL Test 2			
02/13/2024 11:44:10	CarolM9	M9	00006	User Login	TEST, ONE					
02/13/2024 11:39:59	CarolM9	M9	00006	Analyzer Started						
02/13/2024 11:34:55	CarolM9	M9	00006	Start Analysis	TEST, ONE		OL Test 2			
02/13/2024 11:34:54	CarolM9	M9	00006	User Login	TEST, ONE					
02/13/2024 11:21:06	CarolM9	M9	00006	Analyzer Started						
02/05/2024 11:29:18	CarolM9	M9	00006	Start Analysis	TEST, ONE		OL Test 2			
02/05/2024 11:26:46	CarolM9	M9	00006	Archive Database	TEST, ONE					
				Printed on 05/17	/2024 15:05:33					
				Printed by	One Test					
				DSE Software Ve	ersion 02.00.001					

Figure 6-6: Print Preview for Audit Trail Data

- 2. Review the print preview to make sure that it contains the data that you want to print. To print the preview, go to the next step. To save the preview as a PDF file, go to Step 5.
- 3. Click the **Print** button. The Windows *Print* dialog box appears.
- 4. Select a printer and click the **Print** button. The file prints to the specified printer.



**NOTE:** If an Adobe PDF print program is installed on the computer, it will show as one of the available printers.

- **5.** To save the print preview as a PDF file, click the **Save As** button on the *Print Preview* window. The Windows *Save PDF* window appears.
- 6. In the *File name:* field, type a file name and click the **Save** button. DataShare Elite saves a PDF file in the specified location.
- 7. On the *Print Preview* window, click the **Close** button.

## To export audit trail data

1. While you are viewing data on the *Audit Trail* screen, click the **Export...** button. The *Export Options* window appears.

Export Analyzer Audit Trail		×
Export Options		
Export File Name Begins With	Analyzer_Audits	
Select the export file type(s) an	d destination folder(s)	
✓ Text	C:\Users\sievers\Documents	
✓ csv	C:\Users\sievers\Documents	
✓ Excel	C:\Users\sievers\Documents	
PDF	C:\Users\sievers\Documents	
	Export	

Figure 6-7: Export Options for Sample Results

 In the *File Prefix:* field, type an identifier to include in the name of the exported files or leave the default text (*Analyzer\_Audits* or *DataGuard\_Audits*). This default text is customizable on the *Reports / Exports* tab of the *Settings* screen. For more information, see <u>"To configure the default names of export files" on page 31</u>).

- **3.** Select (check mark) or de-select (no check mark) one or more of the following file types for exporting options:
  - Text
  - CSV
  - Microsoft Excel
  - Microsoft Excel (Protected)
  - PDF
  - PDF (Protected)



**NOTE:** The list includes all possible file types; however, only those files types that have been pre-defined as default values appear in the dialog box. For more information about setting default values, see <u>"To configure the default output folders" on page 32</u>

4. (Optional) If you selected the *Microsoft Excel Protected* or *PDF Protected* file type, you can change the password by typing a new password, and you can change the mode (*Encrypted* or *Read-Only*). A user must enter the password to open a fully encrypted file. A user can open a read-only file without the password, but the user must enter the password to change the contents of the file.



**NOTE:** When you select the Microsoft Excel (Protected) and/or PDF (Protected) file types as default values, you can specify the password and mode that appear in the dialog box. For more information about setting default values, see <u>"To configure the default output folders" on page 32</u>.

- **5.** For each file-type option selected, click the *Search* icon. The corresponding Windows *Select Folder* window appears.
- 6. Navigate to and select a folder for storing the file and click the **Select Folder** button. The defined file path appears in the *Folder:* field on the *Export Options* window.
- 7. Repeat steps Step 5 and Step 6 for each file type to export.
- **8.** After selecting and completing file type options, click the **Export** button. DataShare Elite exports a file for each defined file type in the specified location, and an *Export Complete* message appears.
- 9. Click the OK button.

### To create an audit trail report that can be signed electronically

1. Click the *DataGuard* icon and select *Audit Trail* on the *DataGuard* menu. The *Audit Trail* screen appears.

Analyzer	S DataShare Elite	Reports							
<b>Filter</b>									
Reviewed	Timestamp	Analyzer Name	Analyzer Type	Analyzer S/N	Event Code	Event	Old Value	New Value	Signature
	02 Mar 2022 14:09:28		M500	1234	329	Start backup datastore	Manual	/mnt/usb	TEST ONE
	02 Mar 2022 14:09:21		M500	1234	258	Select Top Level Tab		Settings Tab	TEST ONE
	02 Mar 2022 14:09:20		M500	1234	258	Select Top Level Tab		Favorites Tab	TEST ONE
	02 Mar 2022 14:09:17		M500	1234	258	Select Top Level Tab		Help Tab	TEST ONE
	02 Mar 2022 14:09:16		M500	1234	13	User login		TEST01	TEST ONE
	02 Mar 2022 14:08:28		M500	1234	106	Analyzer powered on			No user
	02 Mar 2022 14:05:25		M500	1234	261	User Pressed Power Off			TEST ONE
	02 Mar 2022 14:05:22		M500	1234	258	Select Top Level Tab		Home Tab	TEST ONE
	02 Mar 2022 14:05:19		M500	1234	377	Set result preference	View Rejects: false	true	TEST ONE
	02 Mar 2022 14:05:19		M500	1234	377	Set result preference	Export Rejects: false	true	TEST ONE
	02 Mar 2022 14:05:05		M500	1234	258	Select Top Level Tab		Settings Tab	TEST ONE
	02 Mar 2022 14:05:02		M500	1234	322	Change Selected Sample Data Record		Grab 03/02/2022 08:29:14	TEST ONE
	02 Mar 2022 14:05:00		M500	1234	322	Change Selected Sample Data Record		Grab 03/02/2022 08:29:14	TEST ONE
	02 Mar 2022 14:04:56		M500	1234	312	Change Data Type For Sample Data Refresh	Grab false	Grab true	TEST ONE
	02 Mar 2022 14:04:56		M500	1234	310	Apply Filter For Sample Data Refresh	03/02/2022 00:00:00	03/03/2022 00:00:00	TEST ONE
	02 Mar 2022 14:04:55		M500	1234	312	Change Data Type For Sample Data Refresh	Calibration true	Calibration false	TEST ONE
	02 Mar 2022 14:04:49		M500	1234	311	Reset Filter For Sample Data Refresh			TEST ONE
	02 Mar 2022 14:04:49		M500	1234	312	Change Data Type For Sample Data Refresh	Calibration false	Calibration true	TEST ONE
	02 14 2022 14-04-40		M500	1234	312	Change Data Type For Sample Data Refresh	Grab true	Grah fake	TEST ONE

**2.** Click the *Filter*  $\nabla$  icon to narrow the scope of the audit trail data to be reported. See <u>"To filter audit trail data" on page 157</u> for guidance.



Reports larger than 5,000 records cannot be printed or exported to PDF. They can only be exported as .txt, .xlsx, and .csv.

3. Click the Create Report button. The Create Audit Trail Report dialog box appears:

Create Audit Trail Re	port	×
New Audit Trail	Report	
Report Name	Audit_Trail_Report_2024-06-21	
Items	1659	
Filters	Timestamp Between: 01 Jan 2022 and 31 Mar 2022	
	Create Report Cancel	

- **4.** Review the *Report Name* (this field is editable), *Items* (the number of records in the report), and *Filters*, then click **Create Report**. The *Audit Trail* screen displays the *Reports* tab.
- **5.** From here, you can select the Audit Trail Report from the list and follow the signature workflow detailed in <u>"To sign reports electronically" on page 138</u>.

# Viewing Archived Audit Trail Data

DataShare Elite allows you to view data from one archive file at a time on the two tabs of the *Audit Trail* screen. The data from the archive file is separate from the data in the active DataShare Elite database. You cannot view both sets of data at the same time. If you back up, archive, or restore data while you are viewing data from an archive file, DataShare Elite backs up, archives, or restores data in the active DataShare Elite database, not the archived data that you are viewing.

For instructions on loading archived data into DataShare Elite, see <u>"To view an archive file" on page 102</u>.

# WORKING WITH DATA ABOUT ERRORS

DataShare Elite allows users to review two kinds of errors:

- Errors in data imported from Analyzers and Sensors. See <u>"To display errors in data imported from Analyzers" on page 178</u>.
- Errors that occur during operation of the DataShare Elite application. See <u>"To display</u> DataShare Elite errors" on page 179.



**NOTE:** DataShare Elite does not have a two-way connection with Analyzers. After you import error history data for an Analyzer, you can work with data in DataShare Elite (view the data, filter it, print it, and export it), but you cannot acknowledge errors by sending acknowledgment information back to the

Analyzer.

In addition, you can work with archived data about errors. For more information, see <u>"Viewing</u> <u>Archived Data about Errors" on page 185</u>.

### To display errors in data imported from Analyzers

- 1. Click the *Management icon* and select *Errors* on the *Management* menu. The *Errors* screen appears.
- 2. Click the Analyzers tab. Figure 6-8 shows the Analyzers tab on the Errors screen.

Manager Errors	nent								
Analyzers Dat	aShare Elite								
<b>V</b> Filter									
Timestamp	Analyzer Name	Analyzer Type	Analyzer S/N	Error Code	Ack Date	Ack By	Details	Debug	
02/21/2024 14:22:51	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/16/2024 08:28:31	Heather5310C	M5310C	06918	10094			Severity: Description: IOS Flow Sensor	Module: Task: File: Line:	
02/15/2024 21:48:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:47:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:46:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:45:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:44:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:43:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:42:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:41:55	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:40:44	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:39:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:38:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:37:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:36:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:36:35	HeatherM9Lab	M9	00029	7000			Severity: Description: TC sample pump	Module: Task: File: Line:	
02/15/2024 21:35:54	HeatherM9Lab	M9	00029	10060			Severity: Description: System Error	Module: Task: File: Line:	
02/15/2024 21:34:45	HeatherM9Lab	M9	00029	800			Severity: Description: Sample Cell	Module: Task: File: Line:	
02/15/2024 21:33:55	HeatherM9Lab	M9	00029	3102			Severity: Description: DI flow - IC	Module: Task: File: Line:	
02/15/2024 21:33:55	HeatherM9Lab	M9	00029	3104			Severity: Description: DI flow - TC	Module: Task: File: Line:	
03/15/2024 21-22-54	Heather 101 ab	MO	00020	10060			Essenter Desceletion Curtom Error	Madalar Tasks Eller Lines	

Figure 6-8: Analyzers Tab on Errors Screen

The *Analyzers* tab on the *Errors* screen contains a table of error records for all Analyzers whose imported data contains error history information. Four of the column headings always appear: *Timestamp, Error Code, Details,* and *Debug.* The other column headings (for example: *Analyzer Type* and *Analyzer S/N*) are set by selecting options in the *Application Display* area of the *Displayed Data* screen. For more information, see <u>"To configure the data displayed in the DataShare Elite application" on page 26</u>

Vertical and horizontal scroll bars may appear (depending on the amount of error data, the number of columns displayed, and the height and width of the *Analyzers* tab on the *Errors* screen).

- **3.** You can sort the data in ascending or descending order by clicking a column heading, such as *Timestamp, Analyzer Type, Analyzer S/N, Error Code, Ack Date* (Acknowledged Date), and *Ack By* (Acknowledged By). You cannot sort the data by *Details* or *Debug.*
- To limit the number of records displayed on the *Analyzers* tab of the *Errors* screen, filter the data by specific categories. Refer to <u>"Filtering Data about Errors" on</u> <u>page 180</u> for instructions.

## To display DataShare Elite errors

- 1. Click the *Management i* icon and select *Errors* on the *Management* menu. The *Errors* screen appears.
- 2. Click the *DataShare Elite* tab. Figure 6-9 shows the *DataShare Elite tab* on the *Errors* screen.

Errors	nent					9
Analyzers Da	taShare Elite					
Filter						
Timestamp	Computer Name	Operator Name	Error Code	Message	Ack Date	Ack By
02/29/2024 14:48:21	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:46:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:44:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:42:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:40:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:38:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:36:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:34:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:32:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:30:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:28:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:26:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:24:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:22:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:20:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:18:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:16:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:14:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/29/2024 14:12:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 (00060).		
02/29/2024 14:10:20	DESKTOP-LURLNN8		167	No device found at IP address '205.169.165.190' during auto import. Expected analyzer M9 [00060].		
02/20/2024 14:09:20	DECUTOD ITIDI NINIO		167	No desire found at ID address '20E 160 16E 100' during auto impact Eurosted analyzer M0 (00060)		

Figure 6-9: DataShare Elite Tab on Errors Screen

The *DataShare Elite* tab on the *Errors* screen contains a table of error records for the DataShare Elite application.

A vertical scroll bar may appear (depending on the amount of error data).

- **3.** You can sort the data in ascending or descending order by clicking a column heading: *Timestamp, Analyzer Name* (if enabled for view), *Computer Name, Operator Name, Error Code, Ack Date* (Acknowledged Date), and *Ack By* (Acknowledged By). You cannot sort the data by *Message*.
- 4. To limit the number of records displayed on the *DataShare Elite* tab of the *Errors* screen, filter the data by specific categories. Refer to <u>"Filtering Data about Errors" on page 180</u> for instructions.

# Filtering Data about Errors

On the two tabs of the *Errors* screen, you can filter data about errors in the DataShare Elite database. This section includes instructions for filtering data about errors by:

- Timestamp •
- Error Code •

In addition, you can filter data about errors for Analyzers by:

- Analyzer S/N (serial number)
- Analyzer Type •
- Geography (location, site, and region) •
- **Computer Name**
- **Operator Name**



**NOTE:** This section lists all the available filtering options. The options that appear on the menu for filtering data vary based on the options that have been selected in the Application Display area of the Displayed Data tab on the Settings screen. For example, if you want Analyzer Type to appear on the menu for filtering data, you must display Analyzer Type on the Audit Trail screen by selecting Analyzer Type in the Application Display area of the Displayed Data tab on the Settings screen. Two of the filtering options always appear on the menu: Timestamp and Error Code. For more information, see "To configure the data displayed in the DataShare Elite application" on page 26

# To filter data about errors

Use this procedure to narrow down the displayed data from all error records to a subset of the records.

- 1. On either of the two tabs on the *Errors* screen, click the *Filter* icon.
- 2. To specify a date or date range for the filtered data, select the *Timestamp* filter. The *Timestamp* dialog box appears. If you do not want to specify a date or date range, go to Step 6.



NOTE: You can filter data in any order. You can specify other filters before you specify the Timestamp filter, or you can specify other filters without specifying the Timestamp filter.

**3.** Select an option on the *Filter* list: = (equal to),  $\neq$  (not equal to), > (after or greater than),  $\geq$  (greater than or equal to),  $\leq$  (less than or equal to), < (falling before or less than), Between, or Not Between.
**4.** Based on the *Filter* option you selected, specify a date *Value* or a range of dates between *Value 1* and *Value 2*.

To specify a date, you can:

- Type the date in the Value, Value 1, or Value 2 field using the format mm/dd/yyyy.
- Select the date by clicking the *Calendar* icon next to the *Value, Value 1*, or *Value 2* field. A calendar appears.

Use the **Previous** and **Next b** buttons to navigate to the month and year, then click the day you want. Repeat the process for other fields as necessary.

- 5. When you finish, click the **OK** button. An indicator that the *Timestamp* filter is active appears next to the *Filter* icon.
- 6. To specify an error code or a range of error codes for the filtered data, select the *Error Code* filter. The *Error Code* dialog box appears. If you do not want to specify an error code or a range of event codes, go to Step 10.
- Select an option on the *Filter* list: = (equal to), ≠ (not equal to), > (greater than), ≥ (greater than or equal to), ≤ (less than or equal to), < (less than), *Between*, or *Not Between*.
- 8. Based on the *Filter* option you selected, specify a error code in the *Value* field or a range of error codes (*Value 1*, the lowest error code in the range, and *Value 2*, the highest error code in the range).
- **9.** When you finish, When you finish, click the **OK** button. An indicator that the *Error Code* filter is active appears next to the *Filter* icon.
- **10.** If you are filtering error records for Analyzers, you can set five more filters:
  - To filter data by Analyzer Type Select the Analyzer Type filter. Select a Filter option: = (equal to) or ≠ (not equal to). Select a Value from the list of Analyzers (such as M500, M9, or CheckPoint).
  - To filter data by **Analyzer S/N** Select the *Analyzer S/N* filter. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.* In the *Value* field, type the serial number or a portion of the serial number.
  - To filter data by **Location** Select the *Geography* filter and then select the *Location* subfilter. Select an option form the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a location.
  - To filter data by **Site** Select the *Geography* filter and then select the *Site* subfilter. Select an option from the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a site.
  - To filter data by **Region** Select the *Geography* filter and then select the *Region* subfilter. Select an option from the *Filter* list: = (equal to) or ≠ (not equal to). On the *Value* list, select a region.
- **11.** When you finish specifying values for a filter, When you finish, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.

**12.** If you are filtering error records for DataShare Elite, you can set two more filters:

- To filter data by **Computer Name** Select the *Computer Name* filter. Select an option from the *Filter* list: *Contains, Does Not Contain, Is, Is Not, Starts With,* or *Ends With.* In the *Value* field, type all or a portion of the computer name.
- To filter data by Operator Name Select the Operator Name filter. Select an option from the Filter list: Contains, Does Not Contain, Is, Is Not, Starts With, or Ends With. In the Value field, type all or a portion of the operator name. When you type more than one word, all words must be in the exact sequential order. The field is not case sensitive. For example, to display errors for Alice Carmichael, select Contains for the Filter and specify carmichael for the Value. To enter Alice Carmichael's full user name, select Is for the Filter and specify alice carmichael for the Value.
- **13.** When you finish specifying values for a filter, click the **OK** button. An indicator that the filter is active appears next to the *Filter* icon.
- **14.** To review the values for a filter, hover over the filter. The values appear in a small text box next to the filter.
- **15.** To change the values for a filter, click its indicator. The dialog box in which you specified the values appears. Change the values and click the **OK** button.
- **16.** To remove one or more filters, click the x on the right side of the filter indicator. To remove all filters, click the x on every filter indicator.

## **Printing and Exporting Data about Errors**

DataShare Elite allows you to print data about errors. See <u>"To print data about errors or save the data to a file" on page 183</u>

Additionally, you can export data about errors in one or more of the following file formats: text (\*.txt), comma separated values (\*.csv), Microsoft Excel (\*.xlsx), and PDF (\*.pdf).

You can password protect exported Microsoft Excel and PDF files.

See <u>"To export data about errors" on page 184</u>

#### To print data about errors or save the data to a file

1. While you are viewing data on the *Errors* screen, click the **Print...** button. The *Print Preview* window appears.



NOTE: Remember to filter the data about errors before you print.

- 2. Review the print preview to make sure that it contains the data that you want to print. To print the preview, go to the next step. To save the preview as a PDF file, go to Step 5.
- 3. Click the **Print** button. The Windows *Print* dialog box appears.
- 4. Select a printer and click the **Print** button. The file prints to the specified printer.



**NOTE:** If an Adobe PDF print program is installed on the computer, it will show as one of the available printers. Separate instructions for **saving** the report as a PDF file are included in Step 5.

- 5. To save the print preview as a PDF file, click the **Save As...** button on the *Print Preview* window. The Windows *Save PDF* window appears.
- 6. In the *File name:* field, type a file name and click the **Save** button. DataShare Elite saves a PDF file in the specified location.
- 7. On the *Print Preview* window, click the **Close** button.

#### To export data about errors

- 1. While you are viewing data on the *Errors* screen, click the **Export...** button. The *Export Errors* window appears.
- 2. In the *File Prefix:* field, type an identifier to include in the name of the exported files or leave the default text (*Analyzer\_Errors* or *DataGuard\_Errors*). This default text is customizable on the *Reports / Exports* tab of the *Settings* screen. For more information, see <u>"To configure the default names of export files" on page 31</u>
- **3.** Select (check mark) or de-select (no check mark) one or more of the following file types for exporting options:
  - Text
  - CSV
  - Microsoft Excel
  - Microsoft Excel (Protected)
  - PDF
  - PDF (Protected)



**NOTE:** The list includes all possible file types; however, only those files types that have been pre-defined as default values appear in the dialog box. For more information about setting default values, see <u>"To configure the default output folders" on page 32</u>

4. (Optional) If you selected the *Microsoft Excel Protected* or *PDF Protected* file type, you can change the password by typing a new password, and you can change the mode (*Encrypted* or *Read-Only*). A user must enter the password to open a fully encrypted file. A user can open a read-only file without the password, but the user must enter the password to change the contents of the file.



**NOTE:** When you select the Microsoft Excel (Protected) and/or PDF (Protected) file types as default values, you can specify the password and mode that appear in the dialog box. For more information about setting default values, see <u>"To configure the default output folders" on page 32</u>.

- **5.** For each file-type option selected, click the *Search* icon. The corresponding Windows *Select Folder* window appears.
- 6. Navigate to and select a folder for storing the file and click the **Select Folder** button. The defined file path appears in the *Folder:* field on the *Export Options* window.
- 7. Repeat Step 5 and Step 6 for each file type to export.
- **8.** After selecting and completing file type options, click the **Export** button. DataShare Elite exports a file for each defined file type in the specified location, and an *Export Complete* message appears.
- 9. Click the OK button.

## Viewing Archived Data about Errors

DataShare Elite allows you to view data from one archive file at a time on the two tabs of the *Errors* screen. The data from the archive file is separate from the data in the active DataShare Elite database. You cannot view both sets of data at the same time. If you back up, archive, or restore data while you are viewing data from an archive file, DataShare Elite backs up, archives, or restores data in the active DataShare Elite database, not the archived data that you are viewing.

For instructions on loading archived data into DataShare Elite, see <u>"To view an archive file" on page 102</u>.

# **CHAPTER 7: TROUBLESHOOTING**

Use this chapter for troubleshooting any common DataShare Elite installation and operational issues. This chapter includes a descriptions list of DataShare Elite errors that appear on the *DataShare Elite* tab of the *Errors* screen.

This chapter discusses:

- "The About Screen"
- <u>"Common Troubleshooting Issues" on page 187</u>

## THE ABOUT SCREEN

The *About* screen includes the software version and support contact information, as well as a key number to provide to Technical Support for a password of the day in the case of a forgotten password.

To display the screen, click the *Help* **i** icon and select *About* on the *Help* menu.



#### Figure 7-1: About Screen

## **COMMON TROUBLESHOOTING ISSUES**

**Installation Errors** — If you experience difficulty installing DataShare Elite, be sure to carefully follow the instructions contained in the Installation Guide (DIN 59000-XX) contained in the DataShare Elite installation ZIP file. This document discusses the system prerequisites for successful installation, as well as troubleshooting tips.

Due to the complex nature of this install, we recommend that an IT professional be present during the entire installation to ensure correct system configuration for DataShare Elite.

**DataShare Elite Software Access Errors** — DataShare Elite requires read/write/delete permissions to the *C:\ProgramData\Sievers\Temp* folder, which is created by the application.

#### To configure DataShare Elite access permissions

- 1. In Windows Explorer, select View > Options > Change folder and search options.
- 2. Select the View tab.
- 3. In Advanced Settings, select Show Hidden files, folders, and drives.
- 4. Click the OK button.
- 5. Go to the C:\ProgramData\Sievers\ folder in Windows Explorer.
- 6. Right-click the Temp folder and select Properties.
- 7. Click the Security tab, then the Edit button.
- **8.** If the user or user group to run DataShare Elite is already in the top pane, go to Step 10.
- **9.** To add a new user or user group:
  - Click the **Add** button.
  - Enter the name of the user or user group that will be running DataShare Elite. Click Check Names to make sure the entry is correct.
  - Click the **OK** button.
- 10. In the *Permissions for Temp* dialog box, select the user or user group.
- **11.** Select the *Full Control* option to add all read/write permissions for this folder.
- **12.** Click the **Apply** button.
- 13. Click the OK button.

#### **DataShare Elite Connection Problems**

**Database Errors Appearing in DataShare Elite** — The source of the issue might be due to a lost connection between the computer running DataShare Elite and the SQL Server database.

**Software Unresponsive** — The software might temporarily become unresponsive when performing a database backup or archive. In this case, wait a few minutes and the software will automatically resume responsiveness.

# Appendix A: DP900RST Utility

This appendix provides installation and usage instructions for the DP900RST file converter utility, which converts imported DataPro900 files for use with DataShare Elite.

### To install DP900RST

- **1.** Download DP900RSTSetup.exe from the link provided by your Veolia representative and save it to your PC.
- **2.** Double-click the DP900RSTSetup.exe icon to launch the installation. Accept the terms of the license agreement and click Next.



**NOTE:** If Java 1.8 JRE is not installed, the Java Setup wizard appears. Follow the instructions in the wizard to install Java, and DP900RST installation will resume automatically.

**3.** If Java 1.8 JRE is already installed, DP900RST installation will complete, and the following dialog box appears:



**4.** Click the **Finish** button to close the wizard. The DP900RST Utility is now installed at C:\GEAI\DP900RST. The folder contents should be something like the following:

## USING DP900RST TO CONVERT SIEVERS 900 SERIES DATA FILES

Name ^	Date modified	Туре	Size
📙 Archive	6/30/2021 2:58 PM	File folder	
📒 DataPro900 Files	6/30/2021 2:51 PM	File folder	
📒 DataShare Elite Import	6/30/2021 2:58 PM	File folder	
lib	6/30/2021 2:51 PM	File folder	
📜 logs	6/30/2021 2:58 PM	File folder	
📙 RST Files	6/29/2021 12:01 PM	File folder	
📕 Third-Party Licenses	6/30/2021 2:51 PM	File folder	
실 DP900RST	6/30/2021 11:27 AM	Executable Jar File	190 KB
unins000.dat	6/30/2021 2:51 PM	DAT File	5 KB
🕼 unins000	6/30/2021 2:50 PM	Application	714 KB

# Using DP900RST to convert Sievers 900 Series data files

**1.** Before launching the utility, first manually place the input files to be converted (\*.rst) into the DataPro900 Files folder (C:\GEAI\DP900RST\DataPro900 Files).

GEAI > DP900RST > DataPro900 Files				
•	Name ^	Date modified	Туре	
	2021MAY07_0071_02.rst	5/7/2021 3:58 PM	RST File	
	2021MAY12_0071_02.rst	5/12/2021 2:54 PM	RST File	
	Example 6.rst	5/13/2021 3:37 PM	RST File	

**2.** After moving the files, navigate back to the DP900RST directory. Double-click the DP900RST Executable Jar File. You might briefly see a blue spinning circle as the utility works in the background.

Name ^	Date modified	Туре	Size
📜 Archive	6/30/2021 2:58 PM	File folder	
📒 DataPro900 Files	6/30/2021 2:51 PM	File folder	
📒 DataShare Elite Import	6/30/2021 2:58 PM	File folder	
📕 lib	6/30/2021 2:51 PM	File folder	
📜 logs	6/30/2021 2:58 PM	File folder	
📒 RST Files	6/29/2021 12:01 PM	File folder	
Third-Party Licenses	6/30/2021 2:51 PM	File folder	
DP900RST	6/30/2021 11:27 AM	Executable Jar File	190 KB
unins000.dat	6/30/2021 2:51 PM	DAT File	5 KB
🐙 unins000	6/30/2021 2:50 PM	Application	714 KB

When the conversion is finished, the encrypted .rst files are output in the DataShare Elite Import folder (C:\GEAI\DP900RST\DataShare Elite Import). Human-readable .csv files are output in the csv folder.

GEAI > DP900RST > DataShare Elite Import			
	Name ^	Date modified	Туре
	🖂 📜 csv	6/30/2021 3:29 PM	File folder
	2021MAY07_0071_02.enc	6/30/2021 3:29 PM	ENC File
	2021MAY12_0071_02.enc	6/30/2021 3:29 PM	ENC File
	Example 6.enc	6/30/2021 3:29 PM	ENC File

The input files that you copied into the DataPro900 Files folder in step 1 are deleted from that folder and placed into the Archive folder (C:\GEAI\DP900RST\Archive).

G	GEAI > DP900RST > DataShare Elite Import > csv			
•	Name ^	Date modified	Туре	
	2021MAY07_0071_02	6/30/2021 3:29 PM	Microsoft Exc	
	🕺 2021MAY12_0071_02	6/30/2021 3:29 PM	Microsoft Exc	
	💌 Example 6	6/30/2021 3:29 PM	Microsoft Exc	

The output after each execution of DP900RST is recorded in text files in the logs folder (C:\GEAI\DP900RST\logs). Only two of each log file type is kept—each time DP900RST runs, it writes over the oldest file of the two. In the example below, Error1 and SystemOut1 are the oldest, so they will be the files overwritten on the next run of DP900RST.

GEAI > DP900RST > logs			
Name	Date modified	Туре	
Error1	6/30/2021 2:58 PM	Text Document	
Error2	6/30/2021 3:29 PM	Text Document	
SystemOut1	6/30/2021 2:58 PM	Text Document	
SystemOut2	6/30/2021 3:29 PM	Text Document	

"System.out" is captured in the SystemOutx.log files and "System.err" is captured in the Errorx.log files. So any System.out.println() goes to the SystemOutx.log and exception.printStackTrace() goes to Errorx.log.

To verify the success of the DP900RST conversion, open the log file of the most recent execution—in the example, SystemOut2.

USING DP900RST TO CONVERT SIEVERS 900 SERIES DATA FILES

Three files were converted in the example: 2021MAY07\_0071\_02.rst, 2021MAY12\_0071\_02.rst, and Example 6.rst. These are labeled "read file." The converted, or "created" files have an .enc extension.

```
SystemOut2 - Notepad
File Edit Format View Help
DP900RST
2021-06-30 15:29:58 MDT
read file: .\DataPro900 Files\2021MAY07_0071_02.rst
created file: .\DataShare Elite Import\2021MAY07_0071_02.enc
read file: .\DataPro900 Files\2021MAY12_0071_02.rst
created file: .\DataShare Elite Import\2021MAY12_0071_02.enc
read file: .\DataShare Elite Import\Example 6.rst
created file: .\DataShare Elite Import\Example 6.enc
```

If the conversion is successful, every "read file" will have a corresponding "created file."