QuanLab Forms Administrator Quick Reference Guide

This quick reference guide describes the configuration tasks assigned to the roles of IT Administrator and Manager.

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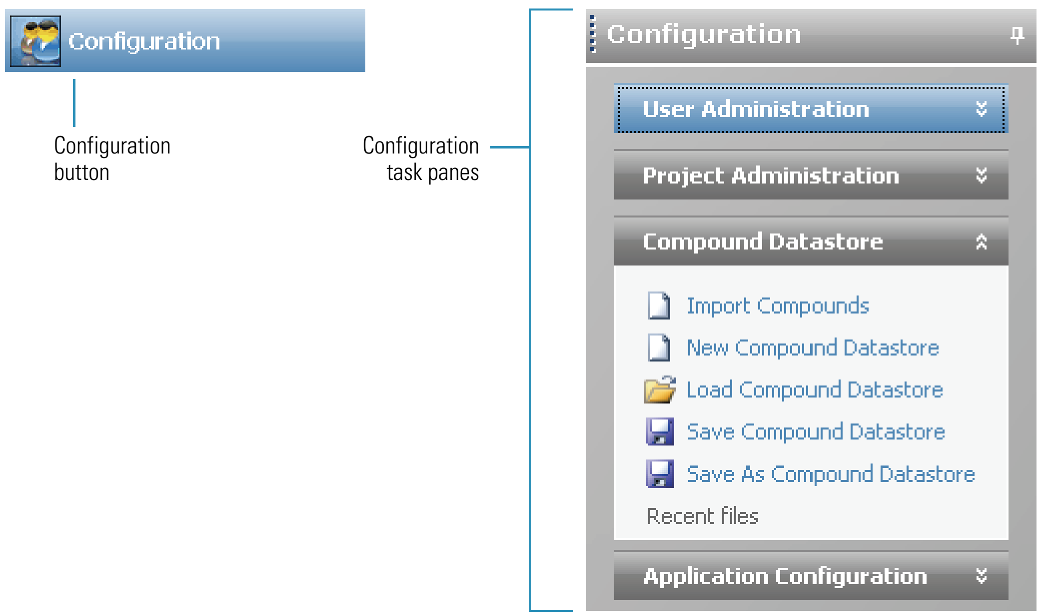
Configuration Mode

To open the Configuration mode, click the Configuration button on the dashboard or from any mode.



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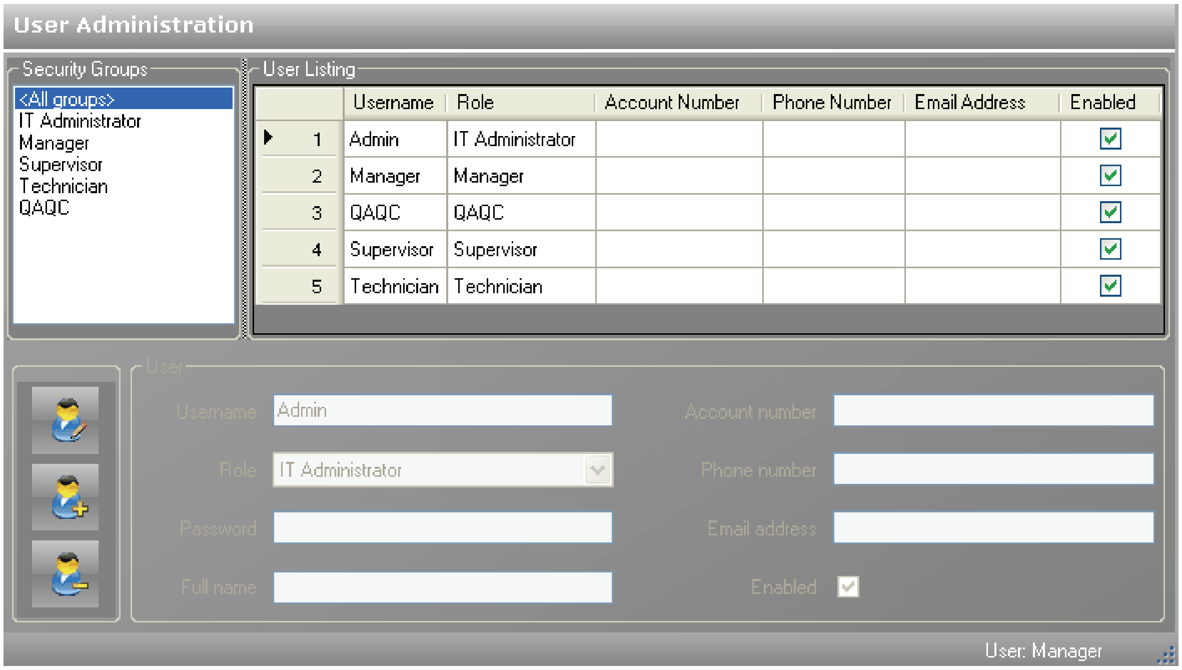
User Administration

In the User Administration view of the Configuration mode, you can add, remove, or edit user accounts and permissions.

IMPORTANT The User Administration view is available only when you have enabled user security in the Application Administration view. See “Application Configuration” on page 6.

For detailed descriptions of each user role and the permissions and responsibilities for each role, refer to the “Using the Configuration Mode” chapter of the *QuanLab Forms 3.1 User Guide*.

To open the User Administration view, click the **User Administration** task pane.



❖ To add a user

1. Click the **Add User** button, .
2. Enter a unique name in the Username box.
3. Select a role from the menu.

   All users must be assigned to one of these roles to determine which QuanLab Forms modes the user can access:

User role	Method Development	Production	Configuration
Manager	×	×	×
IT Administrator			×
Supervisor	×	×	
Technician		×	
QAQC		×	

4. Enter the user’s password.

   There is no confirmation for the password you enter, so you must carefully enter it and communicate it to the user.
5. Optionally, enter the user’s full name, account number, phone number, and e-mail address.
6. When all the user information is correct, click the **Save Changes** button, .

❖ To edit user information

1. In the User Listing, select a user.

   Note Clicking anywhere in the row selects the user.

   The application enters the user information in the parameters boxes in the User group.

2. Click the **Edit User** button, .

   The parameters in the User group are enabled.

3. Edit any of the parameter values.

   If you are editing your current username, the Enabled check box is unavailable. You cannot make your own login unavailable.

4. When all the user information is correct, click the **Save Changes** button, .

   The new parameter values are added to the User Listing and the parameters in the User group are unavailable.

5. To discard all changes and not save the edits, click the **Discard Changes** button, .

   All changes are discarded, and the parameters in the User group are unavailable.

❖ To remove a user

1. In the User Listing, select a user.

   The user information is entered in the parameters in the User group.

2. Click the **Remove User** button, .

   A dialog box asks you to confirm that you want to remove this user.

   If you select your current username, the Remove User button is unavailable. You cannot remove yourself.

   If the user is currently logged in to the QuanLab Forms application, the user's current session is not affected.

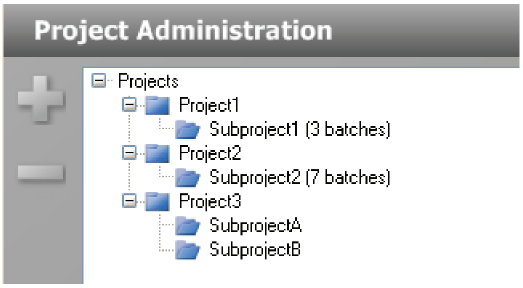
3. Click **OK**.

   Note Rather than completely removing the user, you can make the user login unavailable without removing all the user information from the system. See To edit user information.

Project Administration

In the Project Administration view of the Configuration mode, you can create and manage projects and subprojects.

To open the Project Administration view, click the **Project Administration** task pane.



❖ To add a project or subproject

1. Select the parent project.

   You can select the main Projects folder and create a new project under it, or you can select one of your existing projects and create a subproject under it.

2. Click the plus sign.

   A new, unnamed project is created under the selected project.

3. While the new project is still highlighted, type a new name.

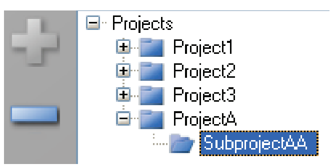
   Project names can contain spaces and some special characters.
   You cannot use the following special characters: \ / : * ? “ < > |

4. To save the new name, press **Enter** or click anywhere in the view.

❖ To delete projects or subprojects

1. Select the project or subproject you want to delete.

   You can delete any project that contains no subprojects. You can delete any subproject that contains no batches. When the selected project or subproject is available to be deleted, the minus sign is enabled.

2. Click the minus sign.

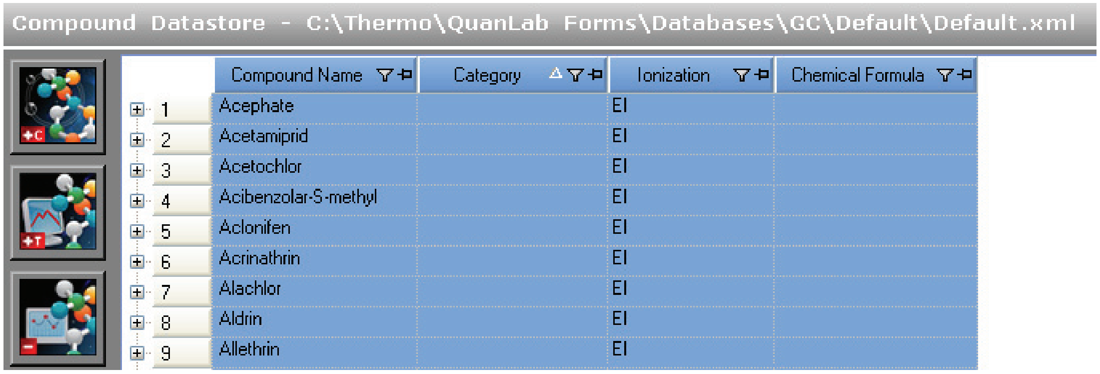
   An Are you sure? message confirms that you want to delete the project or subproject.

3. Click **Yes** to remove the selected project or subproject.

Compound Datastore

In the Compound Datastore view of the Configuration mode, you can manage the definition of compounds in the current datastore.

To open the Compound Datastore view, click the **Compound Datastore** task pane.



❖ To create a new compound datastore

Click **New Compound Datastore** in the task pane.

A new, empty datastore opens in the Compound Datastore view. You can import a file of compounds into the new datastore or you can manually add compounds one at a time.

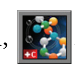
❖ To import compounds

1. Click **Import Compounds** in the task pane.
2. Browse to a .csv or .xml compounds file and click **Open**.

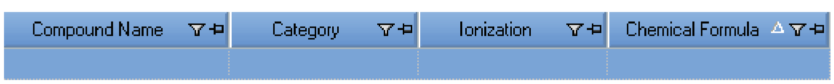
   The QuanLab Forms application imports the compounds in the imported file, adds them to any compounds already in the datastore, and alphabetically sorts them.

❖ To add a single compound

You can manually add a single compound to the existing compounds in a datastore, or you can manually add one compound at a time to populate the datastore.

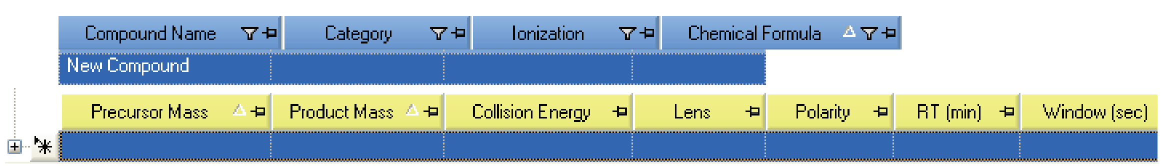
1. To add a single compound to the datastore, click the **Add Compound** button, .

   A new empty compound row is added at the bottom of the compounds list.



2. Click in the first table cell, and enter the required Compound Name parameter.
3. (Optional) Enter values for the Category, Ionization, or Chemical Formula columns.
4. To add a transition, select the compound and click the **Add Transition Information** button, .

   A new empty transition row is added to the compound. A transition includes quantitative values for the compound. Each compound requires at least one transition.



5. Enter all required parameters.

   For list of required and optional parameters, refer to the “Using the Configuration Mode” chapter of the *QuanLab Forms 3.1 User Guide*.

   Tip You cannot add another new compound or save the compound datastore until you enter all required transition parameters or remove the transition from the compound.

6. To save the new datastore, click **Save Compound Datastore** in the Compound Datastore task pane.

❖ To remove a compound or a compound's transition information

1. In the Compound Datastore view, select the row you want to delete.

   You can remove any of the following:

   - An entire compound, including all associated transition information.
   - A row of transition information.

2. Click the **Remove Transition** button, .

   A confirmation message asks if you are sure you want to delete the selected row.

3. Click **Yes** in the confirmation message.

   The selected row and all items within it are deleted.

> **Tip** If you add a row of compound or transition information and do not complete all the required values, you can right-click and choose **Cancel** to remove the entire row. Only incomplete compound or transition rows can be canceled.

Application Configuration

In the Application Configuration view of the Configuration mode, you can choose a default compound datastore or configure the reports that will be available when users generate reports from the Method Development or Production modes.

To open the Application Configuration view, click the **Application Configuration** task pane.

❖ To enable user security

In the User Security area, select the **Enable User Security** check box.

When checked, all users are required to log on to the QuanLab Forms application and have access to only those modes assigned to their user role.

When cleared, users are not required to log on to the QuanLab Forms application. When they start the application, the dashboard is the first screen the users see and all modes are available to them. However, the User Administration view in Configuration mode is hidden and cannot be edited.

> **Note** By default, user security is not enabled.

> **IMPORTANT** If you are the administrator logging on with user security enabled, use **Administrator/Password** as the username/password. Immediately create an account with Manager or IT Administrator permissions for yourself.

❖ To specify a default datastore

1. In the Application Configuration view, click the **General** tab.
2. In the Compound Datastore selection area, click **Select**.
3. In the Select Compound Datastore dialog box, select a datastore to use as the default for all methods created for this technology and click **Select**.
4. In the Application Configuration view, click **Apply**.

❖ To specify available standard reports

1. In the Application Configuration view, click the **Reports** tab.
2. Click the **Standard Reports** tab.
3. Use the directional arrows to move reports from the Installed Reports pane to the Displayed Reports pane.

   > **Tip** Use the CTRL or SHIFT keys to select multiple reports.

   All reports in the Displayed Reports pane are available to users in the Method Development and Production modes.

4. To return the report selections to their original state (when you first opened this page), click **Undo Changes**.

5. To apply the current selections, click **Apply**.

   A message reminds you that you must restart the QuanLab Forms application before your report selections will be reflected in the reports available to users.

❖ To import new standard report types

1. In the Application Configuration view, click the **Reports** tab.
2. Click **Import**.
3. Browse to a Crystal Reports .dll file and click **Open**.

   The application writes the imported report to the QuanLab Forms installation directory, and the Installed Reports pane displays the new report.

❖ To specify available custom reports

1. In the Application Configuration view, click the **Reports** tab.
2. Click the **Custom Reports** tab.
3. Use the directional arrows to move reports from the Installed Reports pane to the Displayed Reports pane.

   All reports in the Displayed Reports pane are available to users in the Method Development and Production modes.
4. To create a single report for an entire batch (rather than separate reports for each sample), check the Batch level report check box for the report type.

   A message reminds you that you must restart the QuanLab Forms application before your report selections will be reflected in the reports available to users.

❖ To import new custom report types

1. In the Application Configuration view, click the **Reports** tab.
2. Click **Import**.
3. Browse to a Custom Reports .xltm file and click **Open**.

   The application writes the imported report to the following folder:

   ..\Thermo\QuanLab Forms\Templates\Reports

   The Installed Reports pane displays the new report.