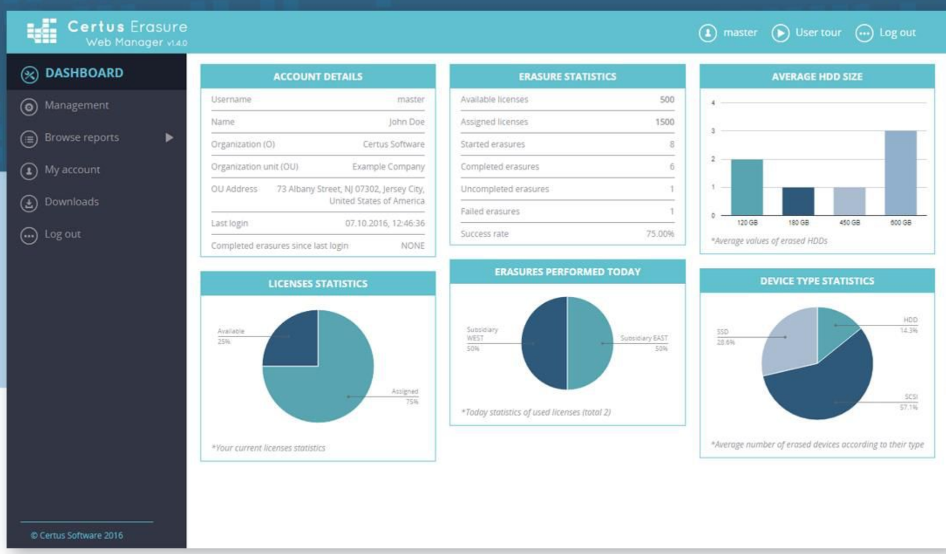
Certus Software

Certified Data Erasure Professionals



User Manual

Certus Erasure Web Manager

Version 1.0

www.certus.software

Certus Software GmbH

HRB 29785

Tattenbachstrasse 1
86179 Augsburg
Germany

Tel: +49 (0) 821 - 650 688 - 0
Fax: +49 (0) 821 - 650 688 - 20
Email: contact@certus.software
Website: www.certus.software

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CHAPTER 1. LOGIN SCREEN

Certus Erasure Web Manager can be operated through a web browser. When accessing its address, you will encounter the login screen, which will ask for your credentials. In order to continue, please insert your ***username***, ***password*** and ***customer code***. If the inserted credentials are correct, the main view of the Certus Erasure Web Manager will be displayed.

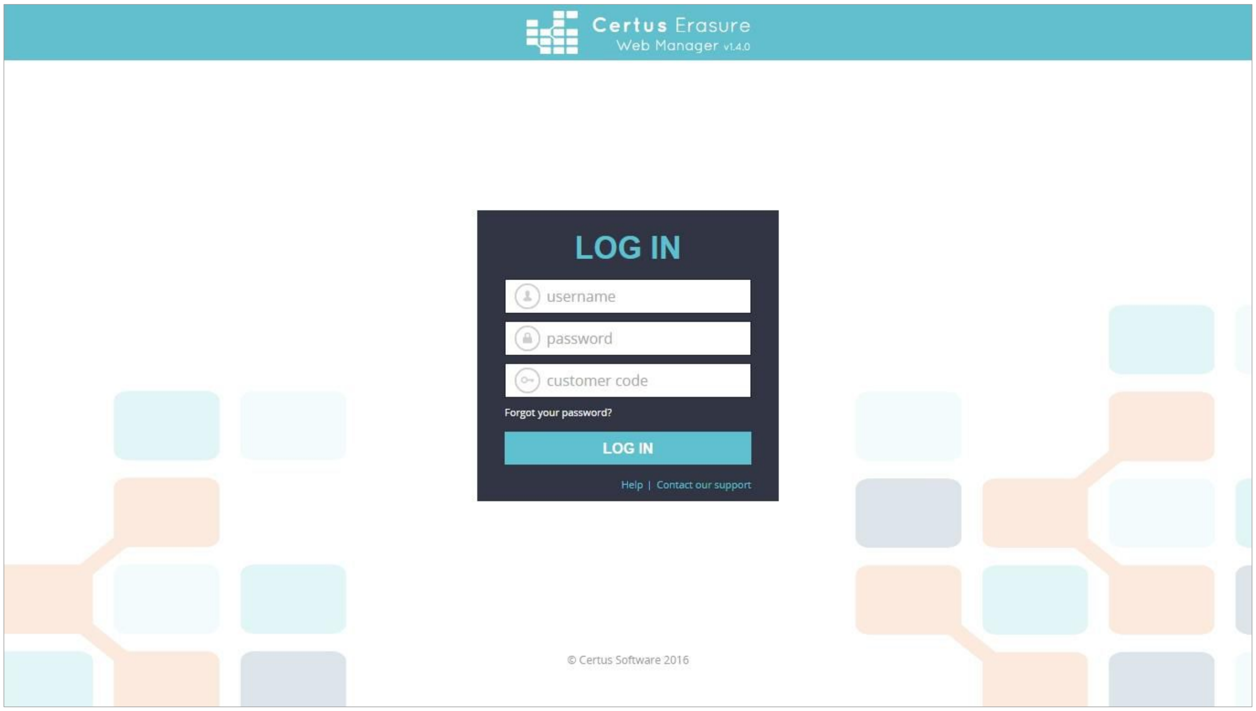

Fig. 1.1. Login screen

CHAPTER 2. CERTUS ERASURE WEB MANAGER USER INTERFACE

Certus Erasure Web Manager is divided in three main areas as follows: the header area, the navigation area and the work area.

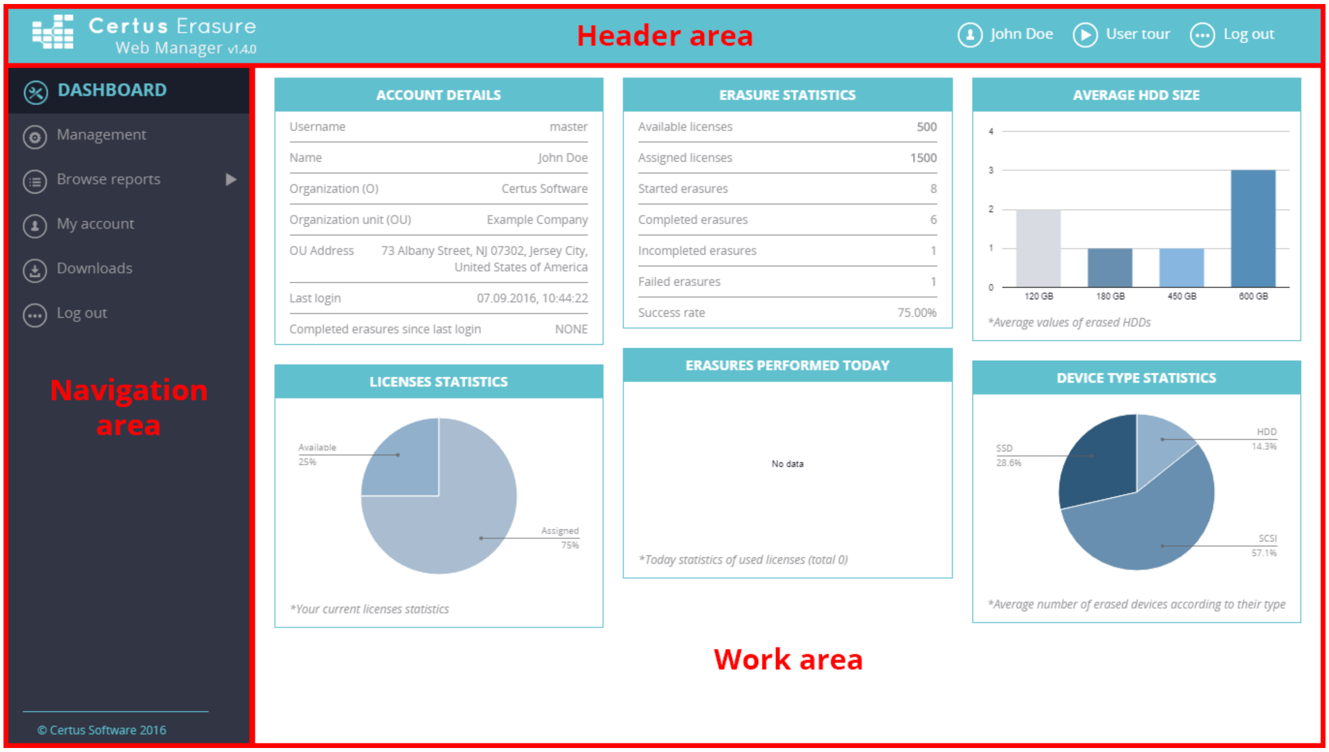

Fig. 2.1. Certus Erasure Web Manager UI

2.1. Header area

The header area contains information about the software in use, such as the software name and the current version. The username of the currently logged in person will be displayed on the right side of the header area along with the **"User Tour"** and **"Log out"** buttons.

2.1.1. Connected user

Click on the username to open a popup window which will allow the connected user to edit his account information. This operation is also available within the **"My account"** button, present in the process area menu.

2.1.2. User Tour

Click on the **"User Tour"** button to go through a set of steps which will present how the application works. The tour is meant to show the main functionalities of this tool and to quickly explain how they are working together. If it's the first time a user logs in or if the user has little knowledge about how to use the software, it is highly recommended to take this tour.

2.1.3. Log out

Click on the **"Log out"** button to close the working session and get back to the Login screen. This operation is also available within the same named button present in the process area menu.

2.2. Navigation area

The navigation area contains the main menu which allows the user to switch the application's modules and access certain functionality. The available modules and operations that can be performed may differ from one user to another depending on their account type.

2.3. Work area

Work area, as its name suggests, will contain all the specific information and functionalities according on what item from the left sub-menu is selected.

CHAPTER 3. DASHBOARD WIDGETS

The dashboard is the first tab to be displayed when the user logs in. It contains different widgets depending on the type of user account that is currently connected. A user account can be of three types which in this document are referred as ***master***, ***administrator*** and ***operator***. More information about this classification can be found at **User types** chapter. The dashboard tab can host maximum 6 widgets from a total number of 8.

3.1. Account Details

The Account Details widget contains basic information about the connected user account. This information includes the following:

- *Username* - used to login into the application;
- *Name* – the full name of the connected person;
- *Company* – the name of the company for which the erasures are performed;
- *Address* – the address of the company for which the erasures are performed;
- *Last login* – the last time when the user logged into the application.

The last field of the account details widget represents a count of the total erasures performed. The total number is calculated differently depending on the type of user connected. Therefore, two situations can occur, each corresponding to the mentioned above user account types:

- *Completed erasures since last login* (for **master** and **administrator**) – the total number of erasures performed since the last login, displayed for each group subordinated (subgroup) to the group to which the master or administrator belongs;
- *Completed erasures today* (for **operator**) – the total number of erasures performed in the current day by the connected operator.

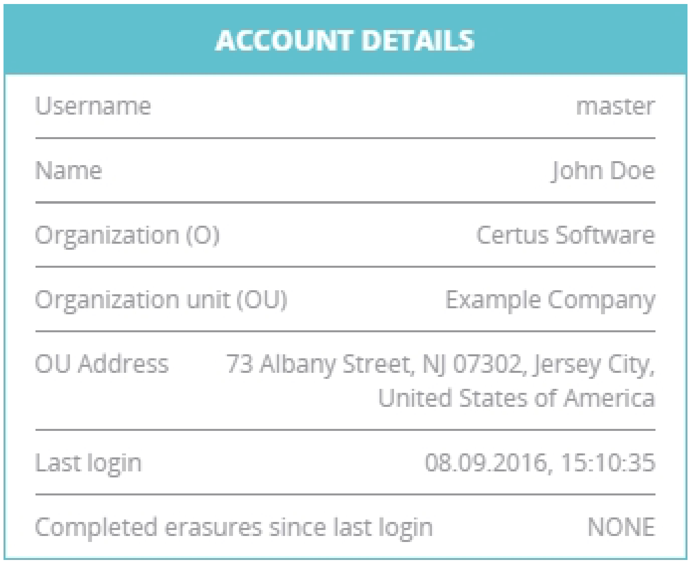

Fig. 3.1.1. Account details widget

3.2. Erasure Statistics

The Erasure Statistics widget keeps track of user licenses and how they were used. Most of statistic data regarding performed erasures are counted here:

- *Available licenses* – available user's licenses
- *Assigned licenses* – user's assigned licenses;
- *Used licenses* – the total number of used licenses;
- *Started erasures* – the total number of initiated erasures;
- *Completed erasures* – the total number of completed erasures;
- *Uncompleted erasures* – the total number of unfinished erasures;
- *Failed erasures* – the total number of failed erasures;
- *Success rate* – the success rate of the performed erasures.

The information present on this widget differ on how it is calculated depending on the type of user connected. Different type of user will have access to different statistics numbers:

- **master** account has access to complete information on the usage of licenses; the counts are being made considering erasures performed by every user of the company;
- **administrator** account has access to information regarding the usage of licenses only for its group;
- **operator** account has access to statistic numbers which relate only to its activity.

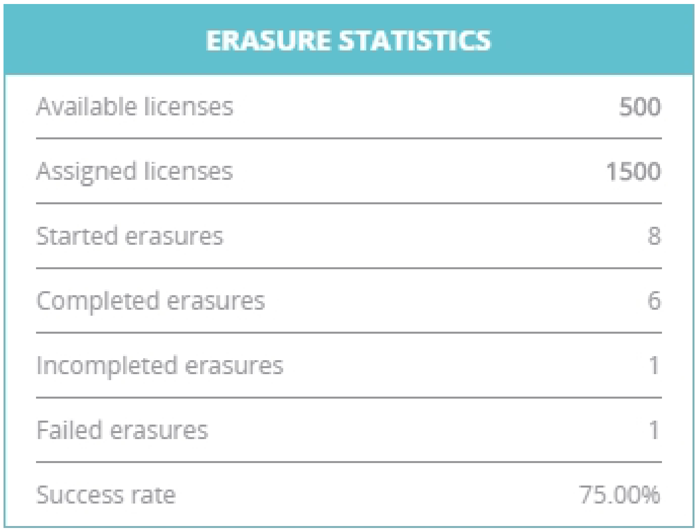

Fig. 3.2.1. Erasure statistics widget

3.3. Device Size Statistics

The Device Size Statistics widget consists in a clean and simple bar chart showing statistics about the erased storage devices. The chart intuitively displays how many storage devices of the same size were erased.

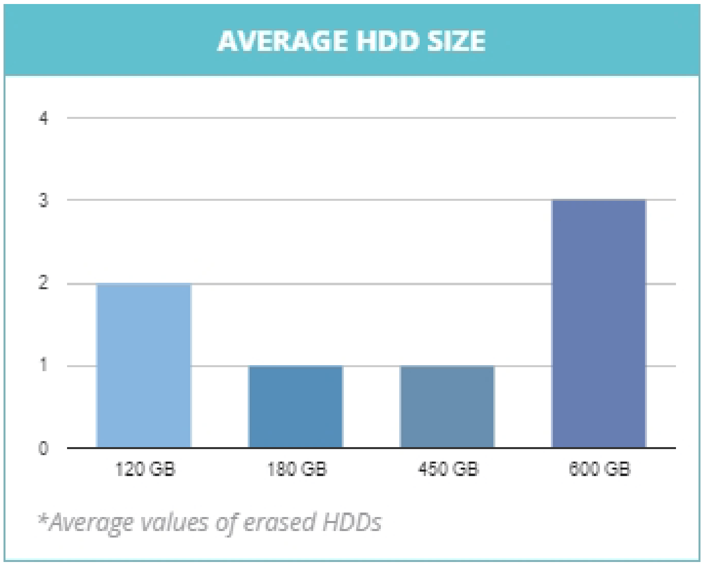

Fig. 3.3.1. Average HDD size widget

The information here will be different depending on the connected user account type:

- for **master** account every storage device erased within the company is considered;
- for **administrator** account are considered only storage drives erased within its group;
- for **operator** account are considered only storage drives erased by the connected user.

3.4. License Statistics

The License Statistics widget will display user's current situation regarding its licenses. A pie chart will contain the number and percentage of available licenses, assigned licenses and used licenses depending on the user account type (see **Licensing** chapter).

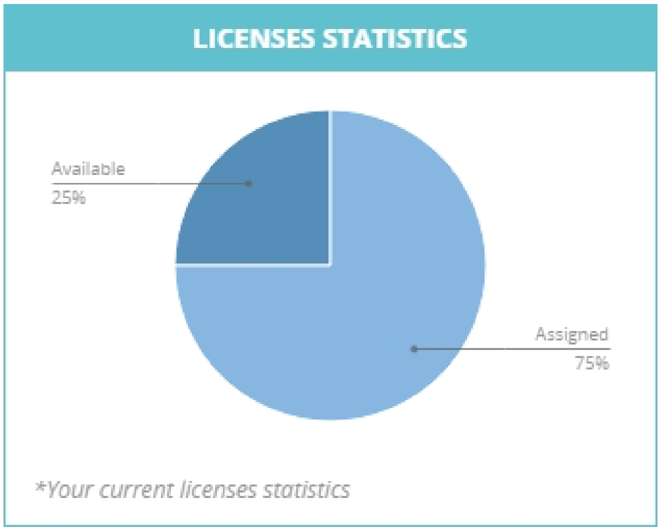

Fig. 3.4.1. Licenses statistics widget

3.5. Used Licenses Statistics

The Used Licenses Statistics widget is available only on administrator accounts. The widget consists in a pie chart with statistics regarding members who have used any licenses.

Fig. 3.5.1. Used licenses statistics widget

Each slice shows the username and the corresponding percentage of licenses used. The Used Licenses Statistics widget relates to the group to which the administrator belongs, thereby only members from his group will be displayed and the total number of licenses used represents the total number of used licenses in his group.

3.6. Erasures Performed Today

The Erasures Performed Today widget holds statistics about erasures performed in the current day and it is available only on master accounts.

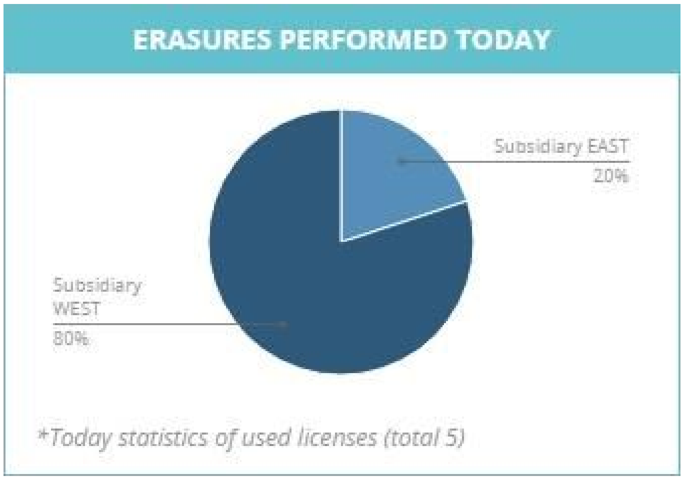

Fig. 3.6.1. Erasures performed today widget

Each slice of the pie chart represents only subgroups of the master group and the corresponding percentage of the erasures performed. The counted numbers for each subgroup includes all erasures performed by subgroup members and also by all members belonging to any structure beneath the subgroup (see **Group/Sub-group structure** chapter).

3.7. Device Type Statistics

The Device Type Statistics widget is showing data about the erased storage devices according to their type. The statistics are represented as a pie chart.

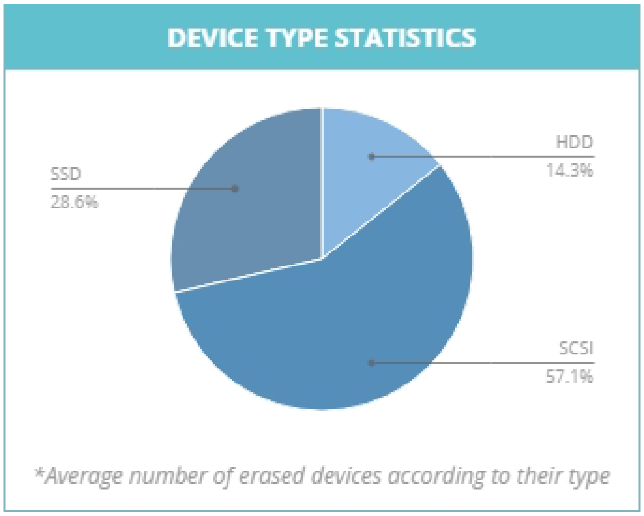

Fig. 3.7.1. Device type statistics widget

Like previous widgets, the information here will be different depending on the connected user account type:

- for **master** account every storage device erased within the company is considered;
- for **administrator** account are considered only storage drives erased within its group;
- for **operator** account are considered only storage drives erased by the connected user.

3.8. Import Reports

The Import Reports widget is intended to help the user to import reports faster through the Import button. This feature is not available for a master account due to the fact that only an administrator or operator can import reports.

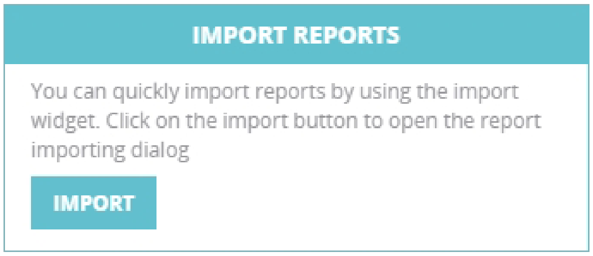

Fig. 3.8.1. Import reports widget

CHAPTER 4. MANAGEMENT TAB

The Management Tab contains information about groups and users. From this section, the connected user can take various actions on other subordinated persons or sub-groups.

Fig. 4.1. Management Tab with its components

The Management Tab includes two components: the **tree view** and the **summary**. The most significant one is the tree structure which presents a hierarchical view of information. The **root** item of the tree is the group to which the user belongs. The summary presents additional information about groups or members. More information can be found in the next chapters.

*Note that this tab is available only to a **master** or **administrator** account.*

4.1. User types & licensing

The Certus Erasure Web Manager classifies user accounts according to the permissions they have and to their access to certain information. The major user types are: **operator**, **administrator** and **master**.

4.1.1. User types

The application counts three different kinds of users which have specific attributions. The highest rank of user type is the master account while the lowest one is the operator. The classification below shows what each type of user can do:

Operator – *the information the operator sees within the application will always be related to his activity:*

- Check statistics regarding its activity;
- Consume licenses;
- Import & export reports;
- Edit reports;
- Delete reports;
- Check report properties;
- Create reporting templates;
- Can edit certain information of his account.

Administrator – *the information the admin sees within the application will always be related to his group and all sub-groups subordinated to it:*

- Check statistics regarding its group or sub-groups activity;
- Control over its group and its sub-groups:
  - Create, edit or delete users;
  - Suspend or activate user accounts;
  - Assign licenses to users;
  - Check user's history;
  - Create or edit its group or sub-groups;
  - Delete sub-groups.
- Consume licenses;
- Import & export reports;
- Edit reports;
- Delete reports;
- Check report properties;
- Create reporting templates;
- Can edit certain information of his account.

Master – *the information the master sees within the application is related to all existing groups and sub-groups:*

- Check statistics regarding groups activity;
- Control over all groups and users:
  - Create, edit or delete users;
  - Suspend or activate user accounts;
  - Assign licenses to users;
  - Check user's history;
  - Create or edit groups;
  - Delete groups.
- Export reports;
- Edit reports;
- Delete reports;
- Check report properties;

- Create reporting templates;
- Can edit certain information of his account.

Note that there can be only a single master account.

4.1.2. Licensing

The licenses are classified according to their state of use as: available, assigned and used. They are perceived different among the three kinds of users presented above.

	Available	Assigned	Used
Master	✓	✓	✗
Administrator	✓	✓	✓
Operator	✓	✗	✓

Fig. 4.1.2.1. The classification of licenses according to user type

The master account holds all the licenses first until it's starting to assign them to administrators and to operators alike. The master account cannot make use of licenses by erasing devices and creating reports, he can just assign them to other users. Therefore, the master account has available and assigned licenses only, however, he can always see how they were used.

The administrator account is the only account type who uses the entire classification. He has available licenses (previously received from a master or other administrator account), assigned licenses (to other administrators or operators) and used licenses (an administrator account can make use of licenses).

The main purpose of an operator account is to erase devices and create reports, therefore it has only available licenses and used licenses.

4.2. Group/Sub-group structure

The top element of the tree is representing the company and it is the highest element of the hierarchy (the root element). The only member of this group is the master account, the rest of the structure being located under the Subgroups tag. *Note that for any user which is not the master account, the root group will be the group to which the user belongs since he doesn't have control above the hierarchy.*

Each group element is divided in two sections: **Members** and **Subgroups**. The Members section is the place where all group members are listed. It is divided in other two sub-items named **Administrators** and **Operators** which distinguish the two types of user present within a group. The two mentioned above sections can be expanded by clicking on the arrow located to their left side, causing the listing of every member belonging to the group and allowing access on taking different actions.

The user account elements in the tree are represented differently according to their state, like in the following example:

erich.hagman - active user account
jordon.clyne - suspended user account
ignacio.jhonson - expired user account

The Subgroups section lists all child groups belonging to the current group. Each of these child groups follows the same structure mentioned above, thus resulting a hierarchy where a group has full control not only over its subgroups but to any structure present way below.

4.3. Managing groups

To manage a certain group, click on the tree element corresponding to the group name. A menu will pop up at the top of the tree:

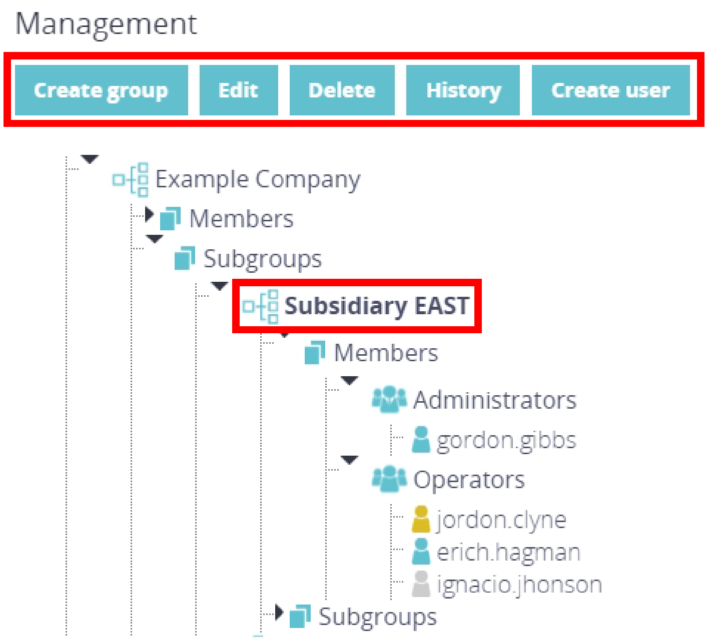

Fig. 4.3.1. Managing groups

Use this menu to manage groups properties, sub-groups or create users.

4.3.1. Create group

To create a new group, click on the **"Create group"** button. A window will appear, asking the user to complete certain inputs.

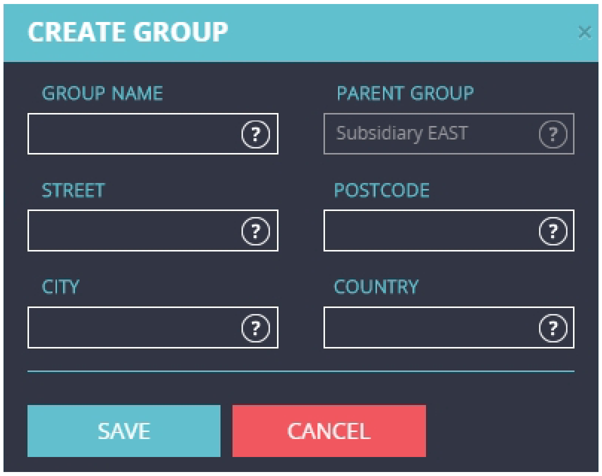

Fig. 4.3.1.1. Create group

All form fields are required and need to be valid:

- *Group name* – name of the group;
- *Street* – street where the group is located;
- *Postcode* – postcode where the group is located;
- *City* – city where the group is located;
- *Country* – country where the group is located.

The *Parent group* field is not editable, its only purpose being to emphasize the parent group in which the new group will be created. This means that the new created group will be a subgroup of the displayed parent group.

Click on **“Save”** button to save the changes or **“Cancel”** to abort the action and close the window. If no errors are triggered when saving, a success message is displayed notifying that the group was successfully created.

4.3.2. Edit group

To edit a group, click on the **“Edit”** button. The window displayed is identical with the **“Create group”** one, except that the fields are already completed with the groups information which can be edited.

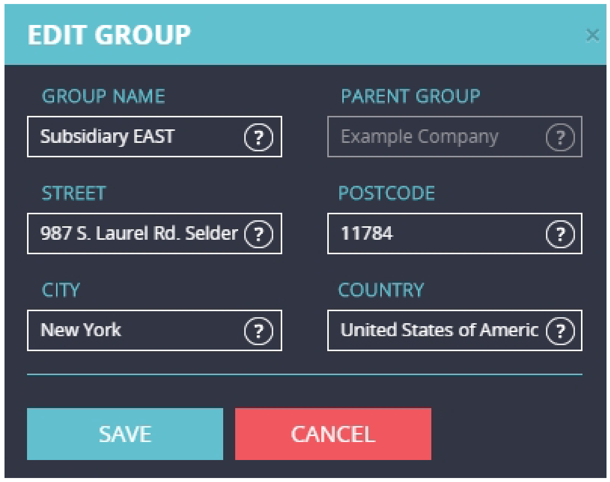

Fig. 4.3.2.1. Edit group

After editing, click on **"Save"** button to save the changes or **"Cancel"** to abort the action and close the window. If the newly introduced information is correct, a success message is displayed notifying that the group was successfully edited.

4.3.3. Create user

To create a new user, click on the **"Create user"** button and complete the form fields. The *Group* field is emphasizing the group in which the new user is created and it can't be edited.

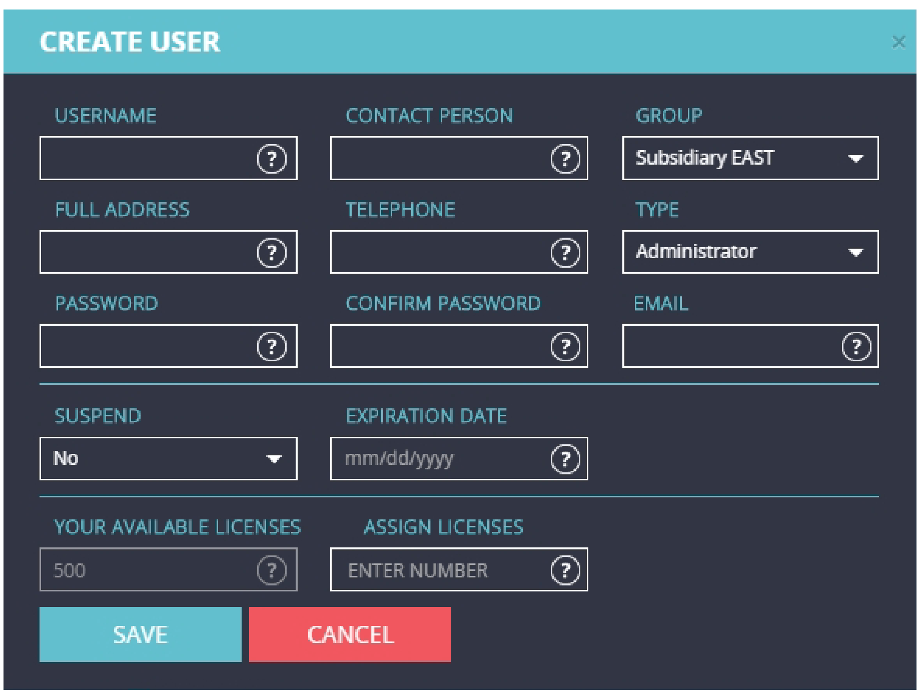

Fig. 4.3.3.1. Create user

The following form fields are required and need to be correctly completed:

- *Username* – account name, which must be unique;
- *Contact person* – name of the user;
- *Full address* – address of the user;
- *Telephone* – user’s phone number;
- *Type* – account type;
- *Password* – account password;
- *Confirm password* – retype the account password;
- *Email* – user’s email address;
- *Suspend* – choose if account is suspended for an indefinite period of time or not;
- *Expiration date* – choose a date when the account will expire.

The last section of the form offers the option to assign a number of licenses when creating the account. The *Available licenses* field inform the user about the number of available licenses he has left. Note that the *Assign licenses* field is optional, licenses can also be assigned later.

After completing the requested fields, click on **“Save”** button to save the changes or **“Cancel”** to abort the action and close the window. If the introduced information is correct, a success message is displayed notifying that the user account was successfully created.

4.3.4. Delete group

A group can be removed by clicking the **“Delete”** button. The window displayed contains information like group name, the number of subgroups belonging to the group and the total number of its users.

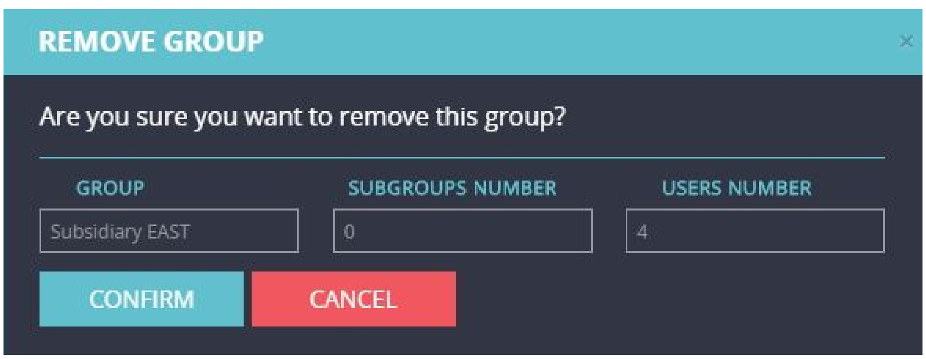

Fig. 4.3.4.1. Remove group

Click on **“Confirm”** button to delete the group or **“Cancel”** to abort the action and close the window. If the group has no data, the operation will be successful.

4.3.4.1. Transfer group data

A group cannot be deleted if it has subgroups or users. In this case all its data needs to be transferred to another group. Click on **"Transfer"** button to proceed.

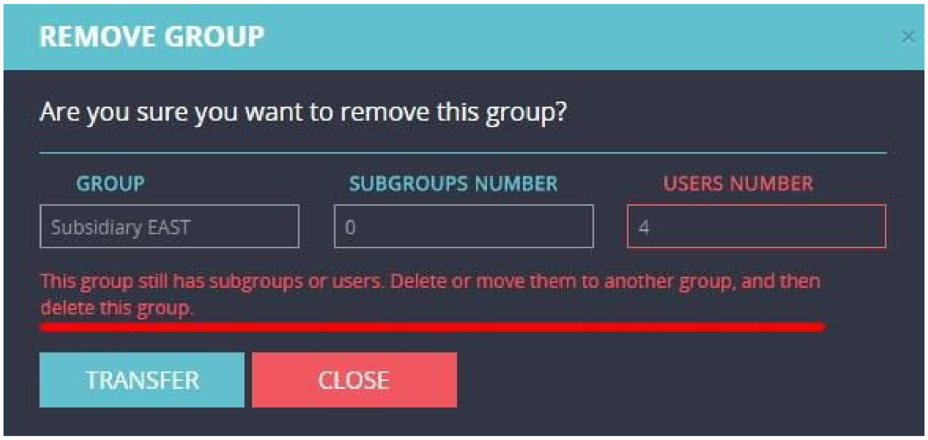

Fig. 4.3.4.1.1. Transfer group data

Data transfer requires the selection of another group from a dropdown list. The groups listed are the only ones towards which the transfer can be made. The listed options are either groups of the same level as the one who's being deleted (subgroups of the same parent group) or the parent group itself (if there are not any other subgroups). The parent group cannot be the master's group.

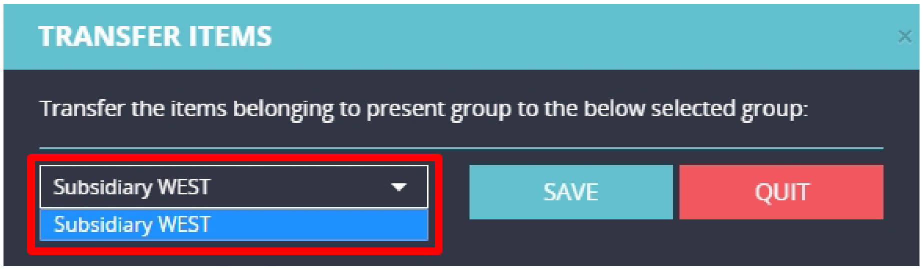

Fig. 4.3.4.1.2. Select a group from the list to transfer the data

Click the **"Save"** button to finish the transfer and delete the group.

4.3.5. Group history

Certain actions on the group are registered and can be accessed by clicking the **"History"** button.

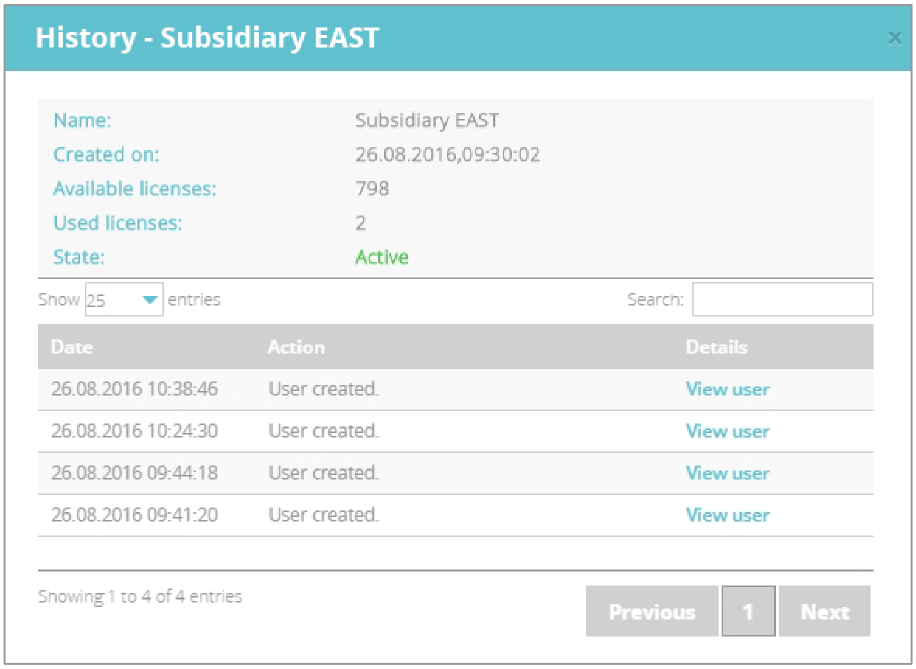

Fig. 4.3.5.1. Group history

The window contains basic information like the group name, the date when it was created, the total number of available and used licenses in the group and group state. The group state can be of two types:

- **Active** – the group can have users and subgroups and can be used for the purpose for which it was created;
- **Deactivated** – the group is deleted and no longer exist.

The table rows represent different actions which took place inside the group. Operations that can be recorded include:

- Creation of a subgroup;
- Creation of a user account;
- Editing the group;
- Removing a group or user.

The first column displays the date and time, the Action column shortly describes the operation and the Details column offers the option to see more information. Clicking the View buttons opens similar windows with detailed data.

4.4. Managing users

To manage a certain user, click on the tree element corresponding to its username. A menu will pop up at the top of the tree:

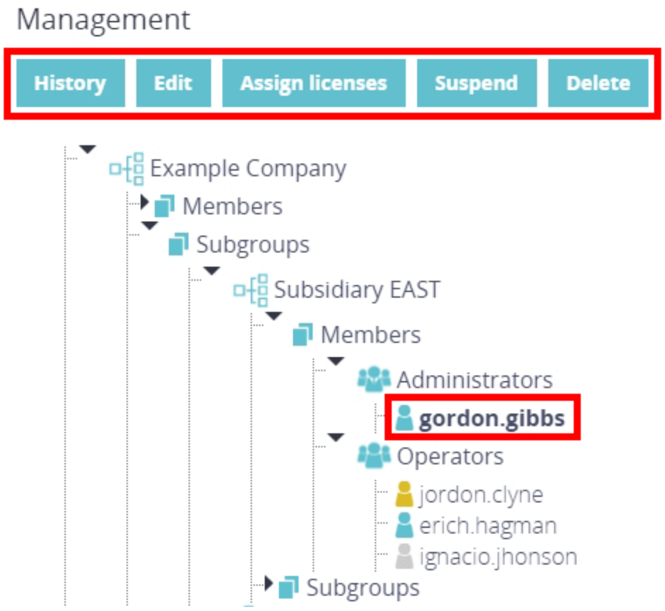

Fig. 4.2.1. Managing users

Use this menu to take various actions on a selected user account.

4.4.1. Edit user

To edit a user, click on the **"Edit"** button. The window displayed is identical with the **"Create user"** window, except that the fields are already completed with user information which can be edited.

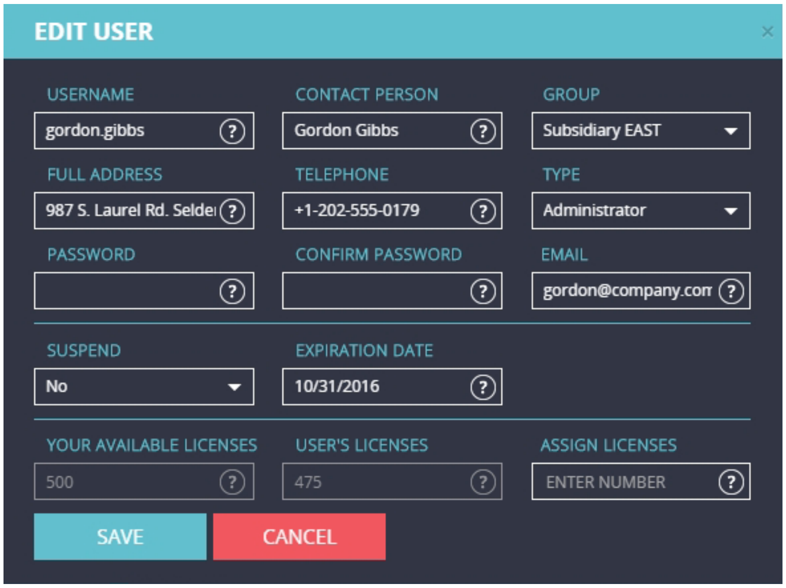

Fig. 4.4.1.1. Edit user

Notice that the two password fields are empty due to security reasons. In this case they are not required. A password is already set for the account when it was created, so if the user account needs to be edited without changing the password this action can take place without those two fields being completed. Otherwise, proceed by typing a new password.

Similar when creating a new user account, the bottom section offers the option to assign licenses to the edited account. The other two fields display the amount of licenses currently available to the edited account (*User's licenses* field), as well as how many the connected user is able to assign (*Your available licenses* field). Note that the *Assign licenses* field is optional, licenses can also be transferred using the *Assign licenses* button.

After editing, click on **"Save"** button to save the changes or **"Cancel"** to abort the action and close the window. If the new introduced information is correct, a success message is displayed notifying that the user account was successfully edited.

4.4.2. My account

Any connected user is able to edit his own account information. To access the editing form, click on the **"My account"** button present within the left menu or on the account username at the top right of the page.

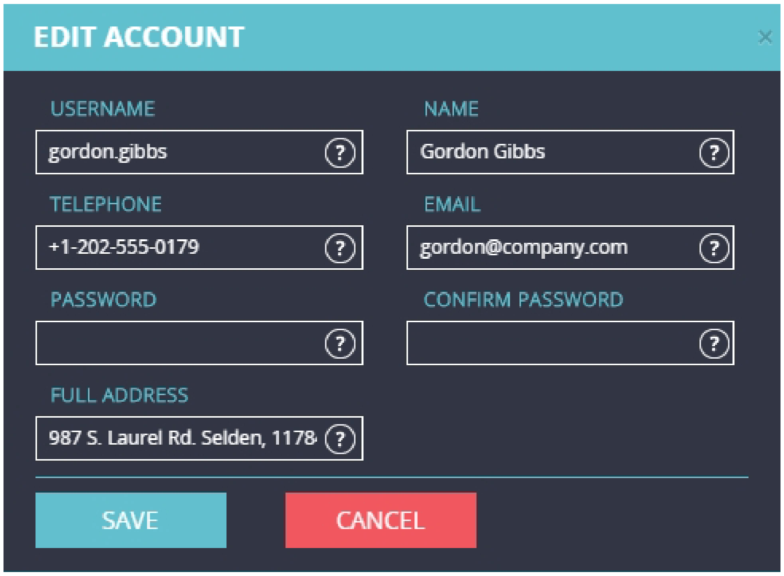

Fig. 4.4.2.1. Edit my account

The user can edit only certain information of his account:

- *Username* – account name, which must be unique;
- *Name* – name of the user;
- *Telephone* – user's phone number;
- *Email* – user's email address;
- *Full address* – address of the user;
- *Password* – account password;
- *Confirm password* – retype the account password.

The fields are already filled with editable data. The user is unable to delete or suspend his own account, change the account type or extend its active period.

Note that password fields are not required for editing the account. Complete the password fields only if a password change is needed.

After editing is done, click on **"Save"** button to save the changes or **"Cancel"** to abort the action and close the window.

4.4.3. Delete user

A user can be removed by clicking the **"Delete"** button. The window displayed contains information like the username, the group to which it belongs and the total number of user's available licenses. Click on **"Confirm"** button to delete the user or **"Cancel"** to abort the action and close the window. If the user has no data, the operation will be successful.

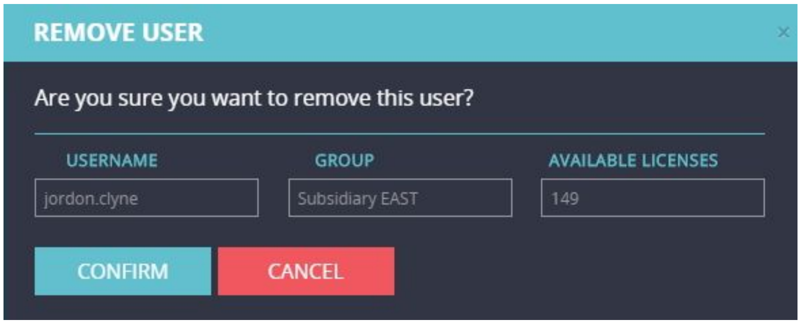

Fig. 4.4.3.1. Remove user

4.4.3.1. Transfer user data

A user cannot be deleted if is holding licenses or if is having any work history. In this case all its data needs to be transferred to another person. Click on **"Transfer"** button to proceed.

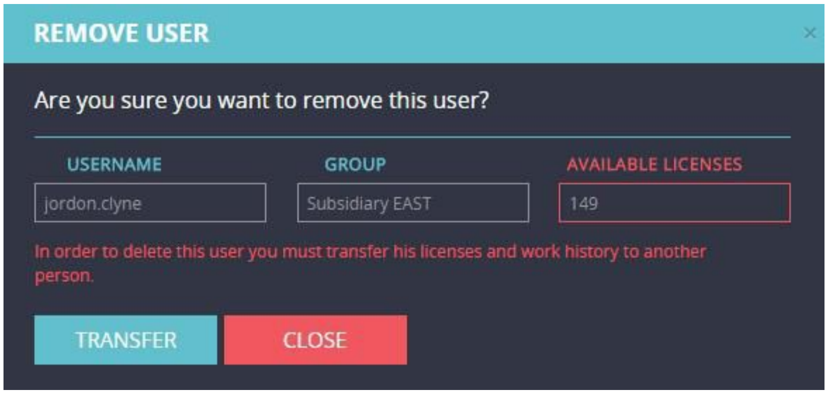

Fig. 4.4.3.1.1. Transfer user data

Data transfer requires the selection of another user from a dropdown list. The listed users are the only ones towards which the transfer can be made. There is always the option to transfer the data to the account that is doing the operation. Other available options depend on the type of user account that will be deleted:

1. **Administrator** – the application is looking first to see if there are other administrators in the same group. If there aren't any, it will start to search for an available administrator in the parent group. If the parent group doesn't have any administrators, the application will go higher in the hierarchy until it reaches the root group of the connected user;
2. **Operator** – the application is looking first to see if there are other both administrators and operators in the same group. If there aren't any, it will start to search for available administrators or operators in the parent group. If the parent group doesn't have any available person, the application will go higher in the hierarchy until it reaches the root group of the connected user.

Additional rules considered in the removal process:

- The application won't look higher beyond the root group of the user performing the operation, meaning that it won't search an option in the parent group of his group;
- If an administrator is alone in its group and the group has subgroups, its account cannot be deleted;
- The master account cannot transfer the data to himself;
- An account cannot be deleted if there aren't any available options for transfer.

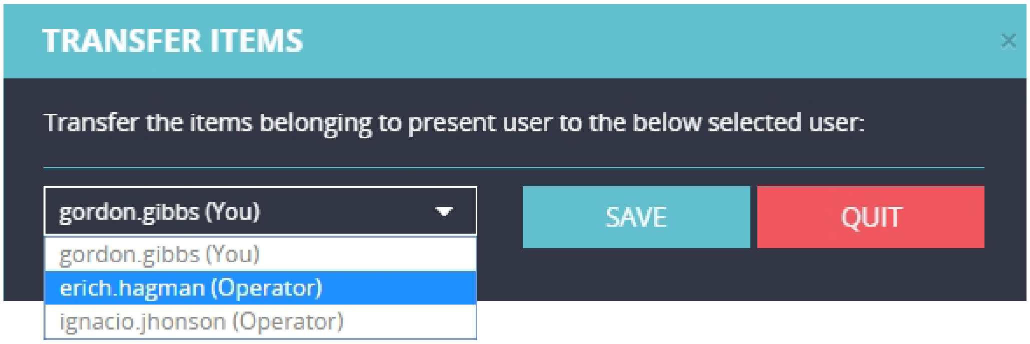

Fig. 4.4.3.1.2. Select a user from the list to transfer the data

Select an option and click the **"Save"** button to finish the transfer and to delete the user or cancel the operation by hitting the **"Quit"** button.

4.4.4. Suspend user

To suspend a user account, click on the **"Suspend"** button. The window displayed contains information like the username, the group to which the user belongs and the total number of user's available licenses. Click on **"Confirm"** button to suspend the user or **"Cancel"** to abort the action and close the window.

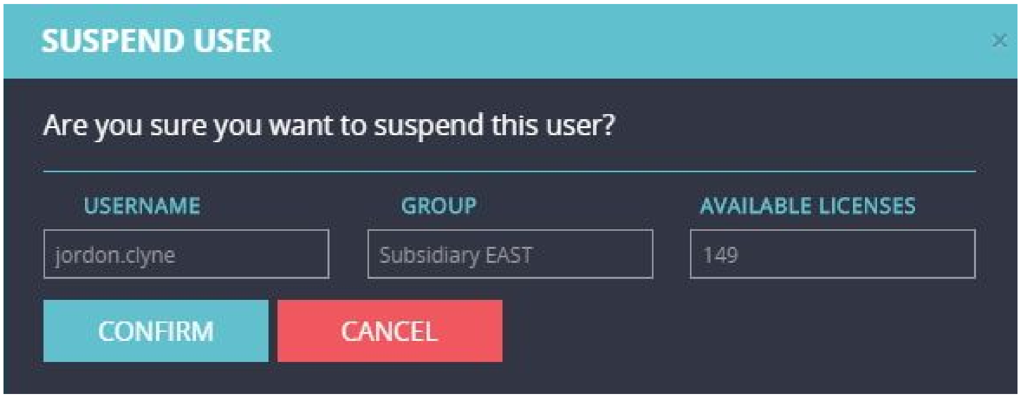

Fig. 4.4.4.1. Suspend user

The suspended user will no longer be able to access his account for an indefinite period of time until it's reactivated again.

4.4.5. Activate user

A user account can always be reactivated if it was suspended or if its active time period has passed.

4.4.5.1. Activate suspended account

To activate a suspended user account, click on the **"Activate"** button. A pop up window will ask for the operation to be confirmed.

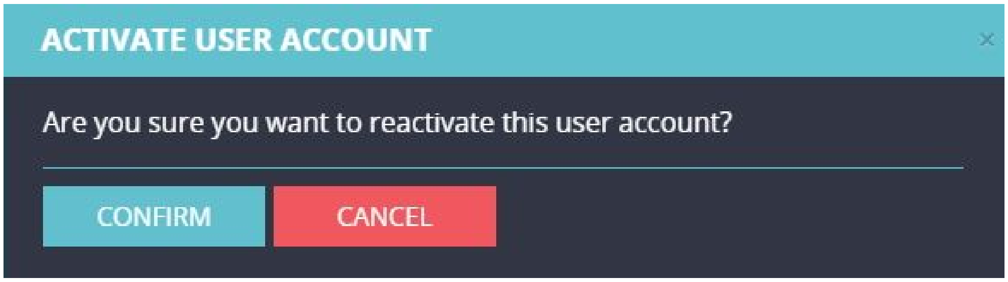

Fig. 4.4.5.1.1. Activate suspended user account

Click on **"Confirm"** button to activate the account or **"Cancel"** to abort the action and close the window. After activation, the user will have immediate access to his account.

4.4.5.2. Activate expired account

To activate an expired user account, click on the **"Activate"** button. A pop up window will ask for the selection of a new expiration date. Click on *Expiration date* field to open a calendar tool and select a convenient date.

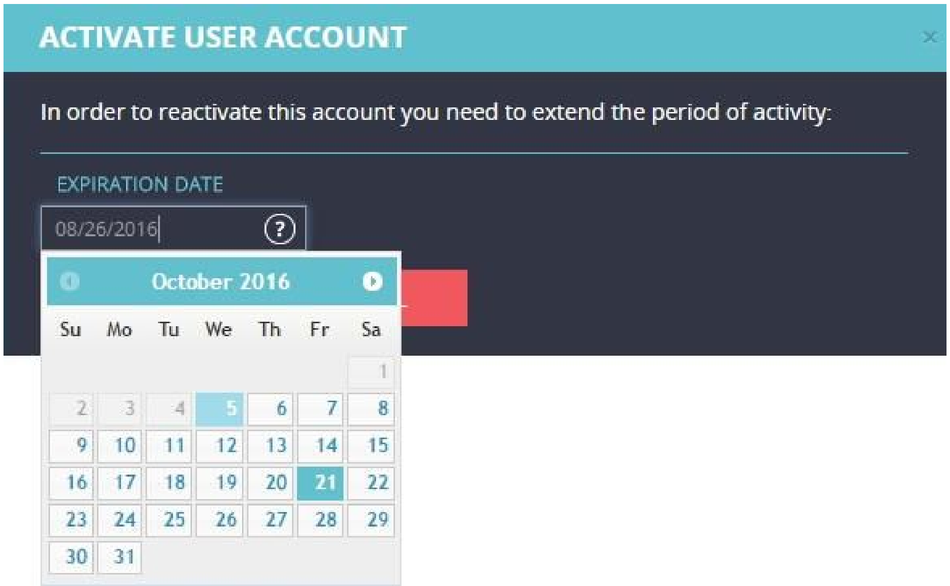

Fig. 4.4.5.2.1. Activate expired user account

Click on **"Confirm"** button to activate the account or **"Cancel"** to abort the action and close the window. After activation, the user will have immediate access to his account.

Note that a suspended account will still expire, meaning that it can be expired and suspended in the same time. In this case a double activation is needed, first to set a new expiration date and second to remove the suspended state.

4.4.6. Assign licenses

As it was mentioned in the previous chapters, besides the possibility to assign licenses when an account is created or edited, there's the option to specifically do this single operation by clicking the **"Assign licenses"** button. The action will open a window where the user can insert the desired amount.

The window is displaying the available licenses of the user which assigns (*Your licenses* field) and the current available licenses of the user who will receive the licenses (*User's licenses* field).

Fig. 4.4.6.1. Assign licenses

Insert a number and click on **"Confirm"** button. An invalid input will trigger errors, otherwise a notifying message will state that the licenses were assigned. The receiving user will be able to consume the licenses immediately.

4.4.7. User history

Certain actions of the user are registered and can be accessed by clicking the **"History"** button. The window mainly consists in a table with detailed information regarding user's actions.

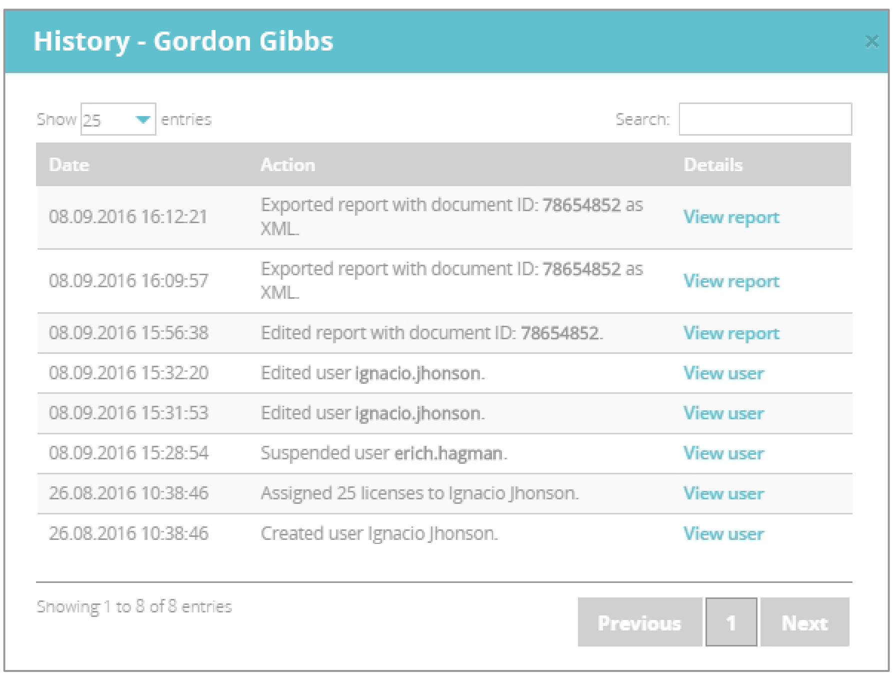

Fig. 4.4.7.1. User history

The table rows represent different actions which the user has made. The first column displays the date and time, the Action column describes the operation and the Details column offers the option to see more information. Clicking the View buttons opens similar windows with detailed data.

Operations that can be recorded include:

- Create, edit or remove a group;
- Create, edit or remove a user account;
- Transfer details when removing a group or user;
- Edit details when changing a user account type;
- Suspension of a user;
- Activation of a user;
- Assignation of licenses;
- Import and export reports;
- Editing or deleting reports.

A user can check his actions history anytime.

4.5. The Summary

The Summary is the second component of the Management Tab. Located on the right side of the page, its purpose is to present additional information related to groups and users. Similar to the menu located above the tree view, the summary content changes when the user interacts with tree elements. There could be up to four different Summary types within Management Tab, depending on which tree item is selected. The difference is made depending on the information shown.

4.5.1. Group Summary

To see the Group Summary, click on the tree element corresponding to a group name. By default, when entering Management Tab, the Group Summary of the connected user group shows up.

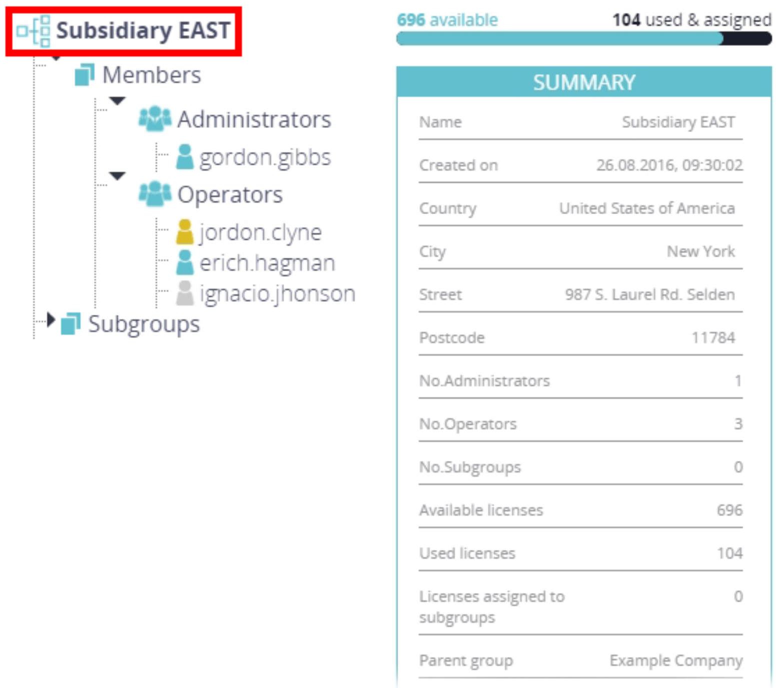

Fig. 4.5.1.1. Group summary

The widget displays multiple data regarding the selected group:

- Its name, the date when it was created, its parent group and all its other details;
- Statistics regarding its members and subgroups (the total number of administrators, operators and subgroups);
- Statistics regarding the licenses managed by its members (the total number of available and used licenses and the amount assigned to its subgroups).

4.5.2. User Summary

To see the User Summary, click on the tree element corresponding to a username.

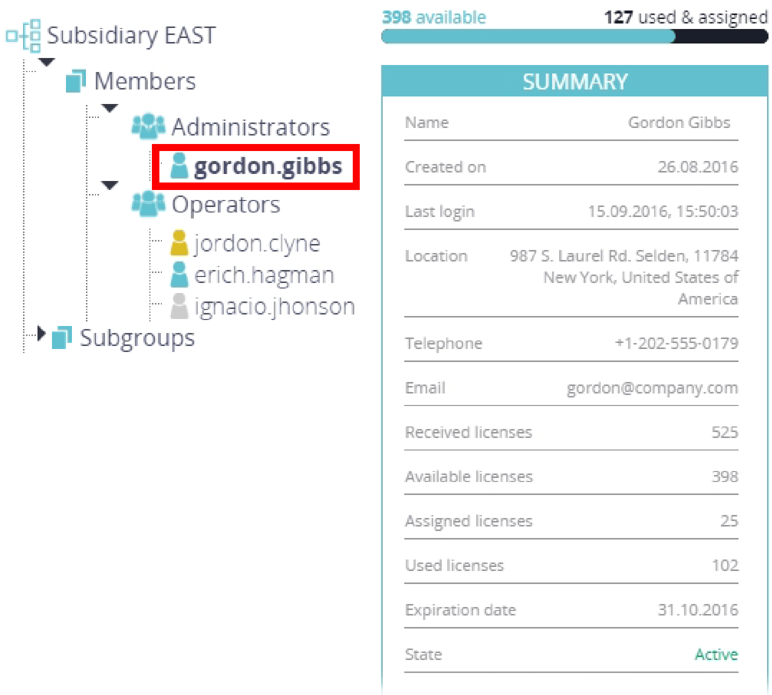

Fig. 4.5.2.1. User summary

The widget displays multiple data regarding the selected user:

- Its name, the date when the account was created and all other contact details;
- The last time when the user logged into the application;
- Statistics regarding its licenses (the total number of available, used or assigned licenses);

The expiration date and the current state of the account.

4.5.3. Subgroups & Members Summary

A group element is divided in two sections: members and subgroups. Clicking on these elements will list either all group members, either all its subgroups.

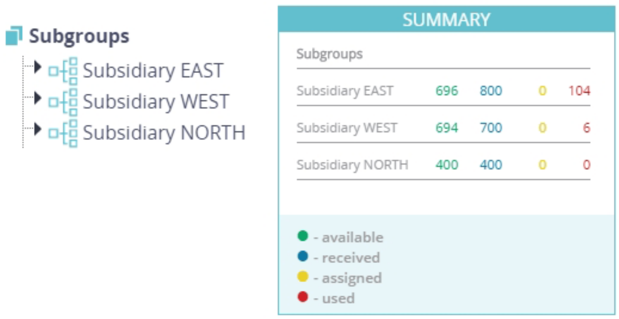

Fig. 4.5.3.1. Subgroups summary

Fig. 4.5.3.2. Members summary

Notice that on the right side of each user or group name are shown a set of numbers. These numbers represent statistics regarding licenses. The counts are made differently, they are referring either to the user, either to all group members:

- Available licenses – available licenses of the user or available licenses within the group;
- Received licenses – licenses the user received or, if it’s the case of a group, licenses the group users received from outside the group;
- Assigned licenses – licenses assigned by the user or licenses that were assigned by group users to other group’s users;
- Used licenses – licenses consumed by the user or by all group members.

The legend at the bottom of the list shows the corresponding colors for each type.

CHAPTER 5. BROWSE REPORTS TAB

The Browse Reports Tab is one of the most important module of the application. In this section are displayed all the Certus reports from the database. The connected user can check the reports **which are accessible** to him (depending on its user account type) and make various operations.

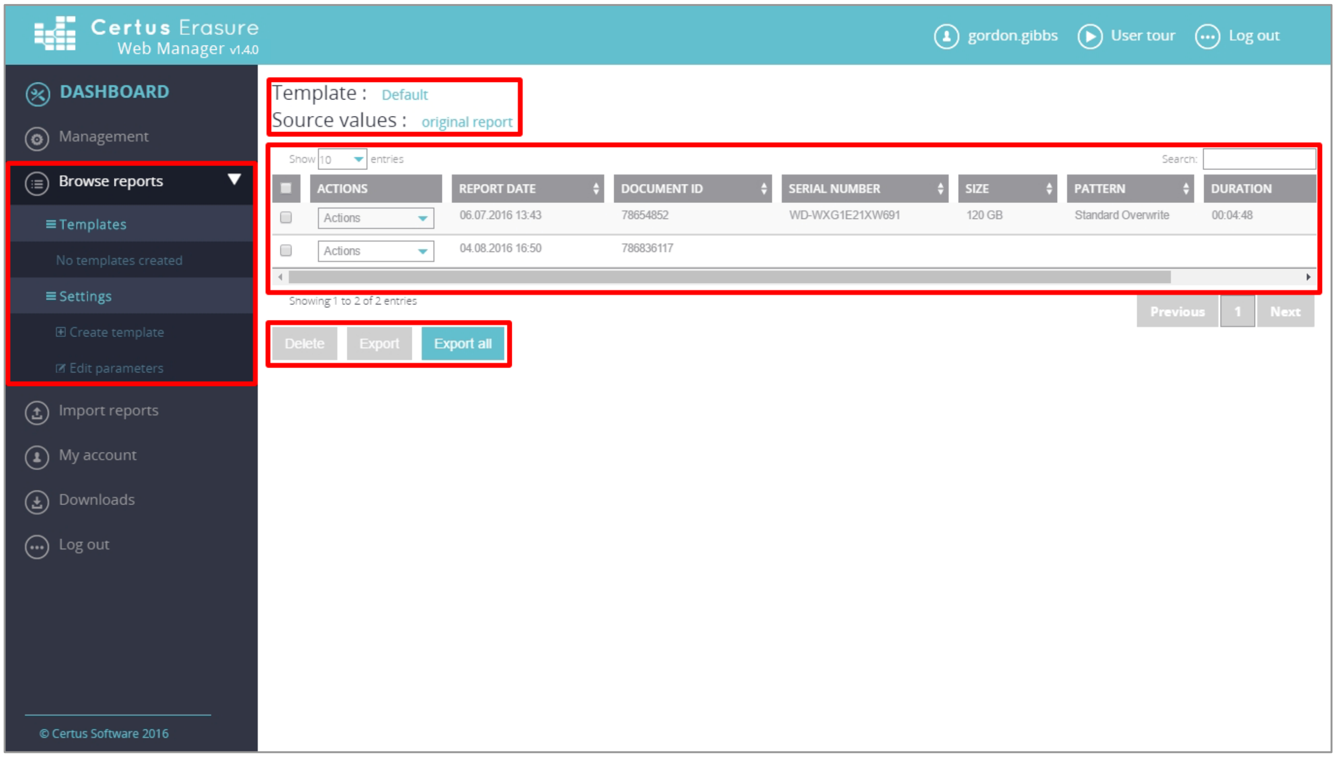

Fig. 5.1. Browse Reports Tab with its components

The Browse Reports page mainly consists in a table which is filled with erasure reports information. Each table row represents a different erased storage device. By default, the table shows a number of 10 erased storage devices per page. This number can be changed using the *Show entries* control located at the top left of the table. It is possible to search through the reports using the *Search* box located on the opposite side, the results will show up as you type. Note that the search process may be slower if there is a significantly larger number of reports.

Fig. 5.2. Show entries, search box

Under the table are placed the pagination buttons used to browse the reports stored in the database. Use the **"Previous"** and **"Next"** buttons to access the previous or next page or select a certain page number to go to.

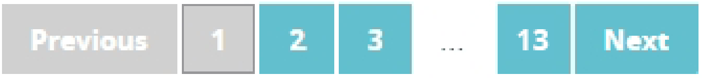

Fig. 5.3. Pagination

The top side of the page displays the name of the current template and the type of report values shown in the table, while at the bottom of page, the user has access to a few functionalities which can be performed on multiple reports. More information can be found in the next chapters.

Another important detail of the Browse Reports Tab is the left side submenu. This is divided in two sections: Templates and Settings. When the user has created templates, those are accessible under the Templates submenu. The Settings section offers additional functionalities like creating a new template and editing the report parameters (see **Create template** chapter).

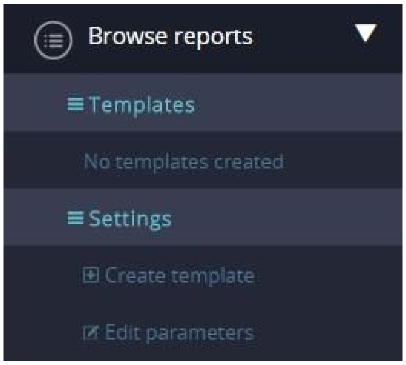

Fig. 5.4. Browse reports submenu

5.1. The Certus Data Erasure report

To better understand the information displayed in the Browse Reports Tab, is very important to know what constitutes a report. A report is divided in three main sections, each displaying various data related to the performed erasure, those sections are: Document Info, System Hardware Information and the erased storage devices.

The first section contains document related info like the identification number or the date when the report was created. The second part of the document, as its name states, holds hardware related information of the system on which the erasure was performed. The last section contains information about the erased storage devices. **A report can have one or more erased storage devices.**

For example, a user erases five storage devices using a certain system. To complete this task, he uses five licenses, then generates the report and sends it to the Certus Web Manager. The generated report file contains information about the document, the hardware of the system on which the erasures were performed and all five erased storage devices. Therefore, when accessing the Browse Reports module, the user is able to see not one, but five different blocks of information corresponding to each storage device erased. However, all five devices belong to the same report. This separation helps the user to export the report with information related only to one storage device and not all five (see **Export reports** chapter).

5.2. Manage reporting templates

The template represents the way in which the report's related information is displayed on the screen. In other words, the report fields in which the user is particularly interested can be selected and saved in what is known as a template. After that, the template can be accessed anytime from the Templates section on the left submenu.

By default, the application comes with a default template which is always available when accessing the browse reports module. The default template has only a few parameters and displays the original values of the reports. It cannot be edited or removed.

5.2.1. Create template

To create a new template, click on the **"Create template"** button. This is available under the Settings section of the Browse reports submenu, as it was shown at the beginning of this chapter.

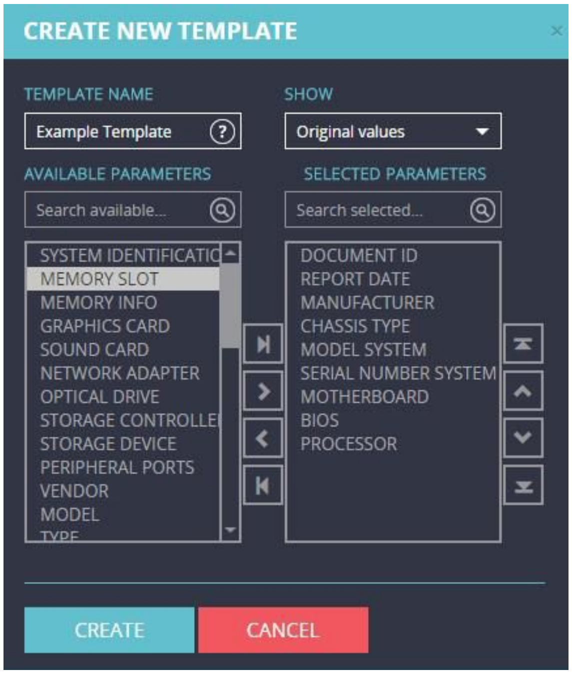

Fig. 5.2.1.1. Create new template

The required fields are the *Template name* and *Selected parameters*. The user must fill in a name for the template and select the desired parameters from the *Available parameters* list. The *Show* field sets the type of values displayed by the template, those can be original values or edited values.

Click on **"Create"** button to proceed or **"Cancel"** to abort the action and close the window. If no error is triggered, the template will be created and be available under the Templates section.

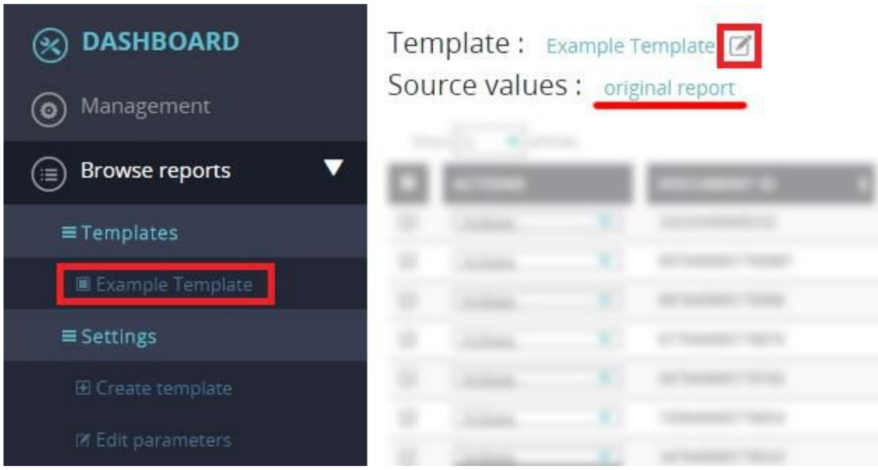

Fig. 5.2.1.2. New template created

5.2.1.1. Template parameters

The main component of a template are its parameters. The parameter is a **name – value** pair which holds information related to the erasure process. Considering the Browse Reports table and a certain template, the **name** of template parameters represents the column headers of the table while the **values** are the column data wherewith the table is filled (i.e.: Document ID = *786836117*, Pattern = *Standard Overwrite*).

When creating a template, use the arrow controls to select any desired parameters from the *Available parameters* list:

- Add all parameters to the template;

- Add the selected parameters to the template;

- Remove the selected parameters from the template;

- Remove all parameters from the template;

- Move selected parameter to the top of the list (fist column in the table);

- Move selected parameter up in the list (moving left in the table);

- Move selected parameter down in the list (moving right in the table);

- Move selected parameter to the bottom of the list (last column in the table).

To easily find a certain element, use the search boxes located above each list. The search operation is performed as the user types.

5.2.1.1.1. Edit the parameters name

It is possible to edit the name of the parameters after user's preferences. To do that, click on the **"Edit parameters"** button available under the Settings section of the Browse reports submenu.

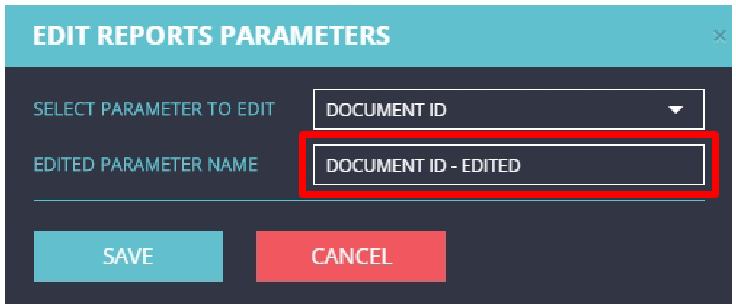

Fig. 5.2.1.1.1.1. Edit parameters name

Choose the parameter to edit from the available list and in the input box type the new name. Click on the **"Save"** button so that the changes to take place.

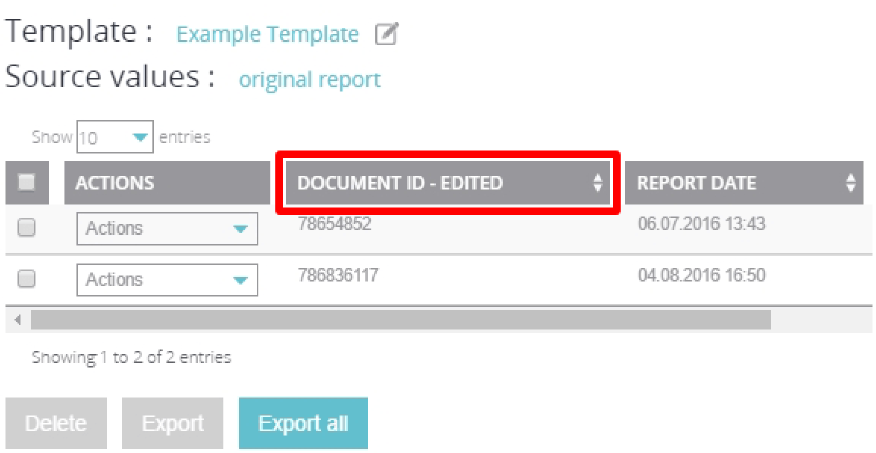

Fig. 5.2.1.1.1.2. Document ID parameter edited

The new version of the parameter's name is updated immediately and will appear in the table. When a parameter name has been edited, the user is able to export reports in CSV and XLS file formats keeping the new name of the parameter.

Note that the new name applies to all templates and to all reports exported as CSV or XLS.

5.2.1.2. Template source values

The report parameters value can always be edited as the user wishes. When a value is edited, the application creates a copy of the current report, containing the new introduced information. However, the original report remains intact while the one with edited values is stored separately.

When creating a template there's the option to choose its source values which are being displayed; those can be the **Original values** or **Edited values**. Selecting Original values will cause the template to display only the original reports from the database. Selecting Edited values will cause the template to display only the reports which were edited. The user can always switch between the source values by editing the template.

5.2.2. Edit template

To edit a template, click on the pencil icon located on the right side of the template name (see fig 5.2.1.1 from **Create template** chapter). The window displayed is identical with the **"Create template"** one, except that this time the user has the option to delete the template.

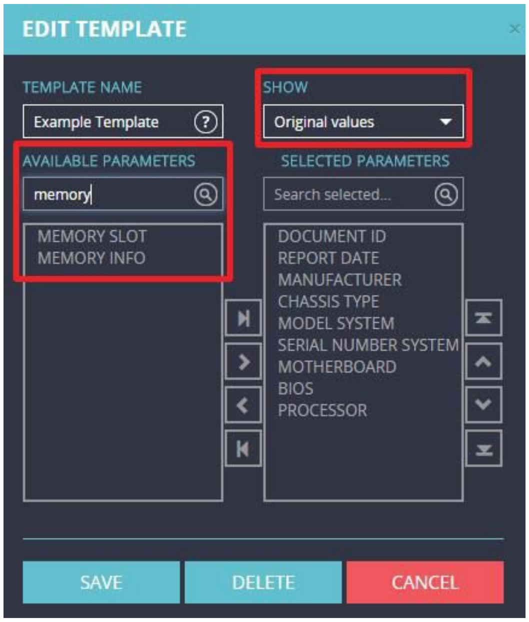

Fig. 5.2.2.1. Edit template

The fields are already completed with template's current configuration. From this window the user can change the current source values displayed. The above example also shows how the search boxes can be used to search for a specific parameter.

After editing the template, save the changes by clicking on **"Save"** button or **"Cancel"** to abort the action and close the window. If no error is triggered, the new template configuration will be saved.

5.2.3. Delete template

A template can be removed by clicking the **"Delete"** button. The operation is available when editing the template.

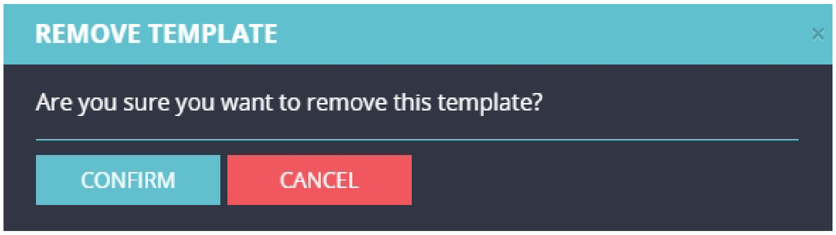

Fig. 5.2.3.1. Remove template

The pop up window will ask for the operation to be reinforced. Click on **“Confirm”** button to completely remove the template or **“Cancel”** to abort the action and close the window.

5.3. Manage reports

The main purpose of the Browse Reports module is to offer to the user the possibility to manage its reports in a professional fashion. The reports the user has access to depends on its account type:

- **Master** – has access to all the reports from its company’s database;
- **Administrator** – has access to every report resulted from erasure processes performed within his group;
- **Operator** – has access only to reports created using its account.

Operations which can be done on a report are available under the **“Actions”** button. This can be found under the Actions column from the table (the Actions column is not a parameter), for each report individually.

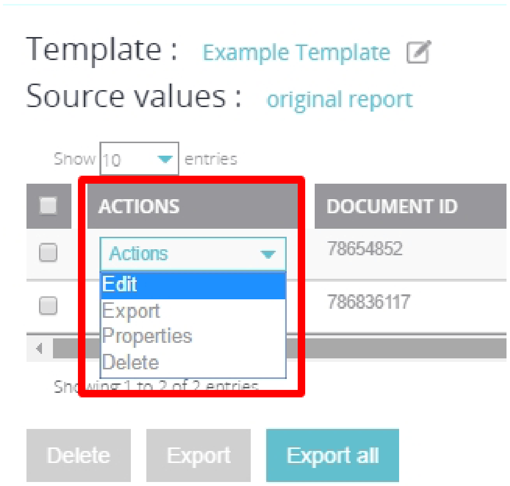

Fig. 5.3.1. Select actions

In addition to the actions presented above, the user can edit the parameters name of its reports. More information can be found in the following chapters.

5.3.1. Edit report values

Select the **"Edit"** option to start editing the template parameters values. The window contains basic information like the document identification number, the username of the person who created the report and the date and time when the report was made.

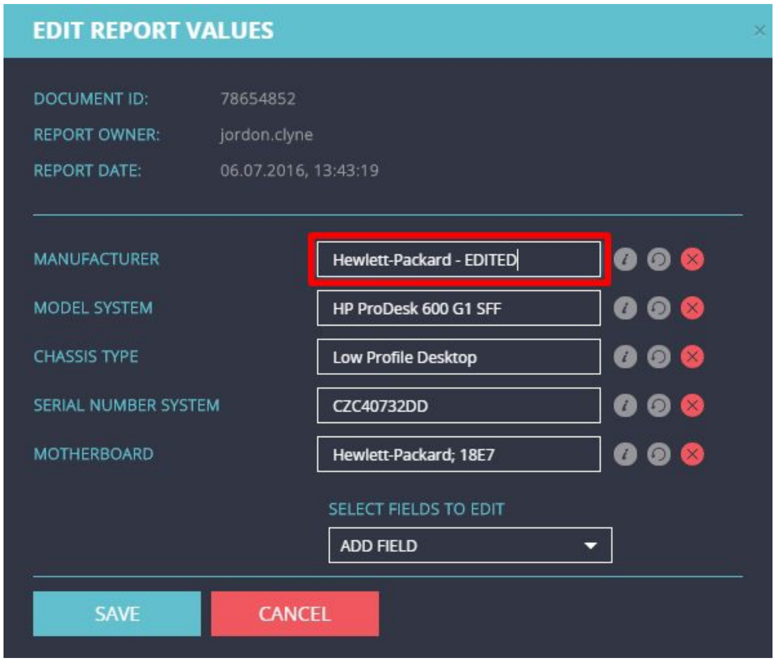

Fig. 5.3.1.1. Edit report values

To edit a certain parameter, click on the **"ADD FIELD"** button and select it from the dropdown list. This action will cause the adding of a new line to the form, containing the parameter's name and value along with several buttons. *Note that not all the parameters can be edited.* The buttons can be used to manage the selected parameters:

– gives information about the selected field
– returns the field's initial value
– removes the field from the edit report window without saving changes

In the above example, the "Manufacturer" field has been changed by adding the "EDITED" word at the end of it. After saving the changes, the edited report can be found among the other edited reports in the Browse Reports Tab.

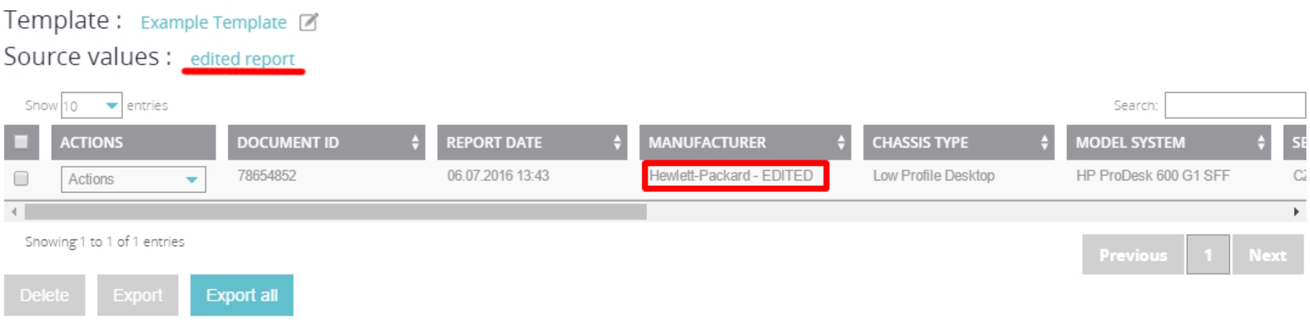

Fig. 5.3.1.2. Report value edited

Note that in order to see the edited reports, the Source values property of the used template must be set to show the edited values. The edited reports can have two custom fields added to the document, which the user is free to use as he wants.

5.3.2. Export reports

Select the **"Export"** option to get the Certus erasure reports on your local drive. The displayed window will ask to set the desired file format and the type of values needed.

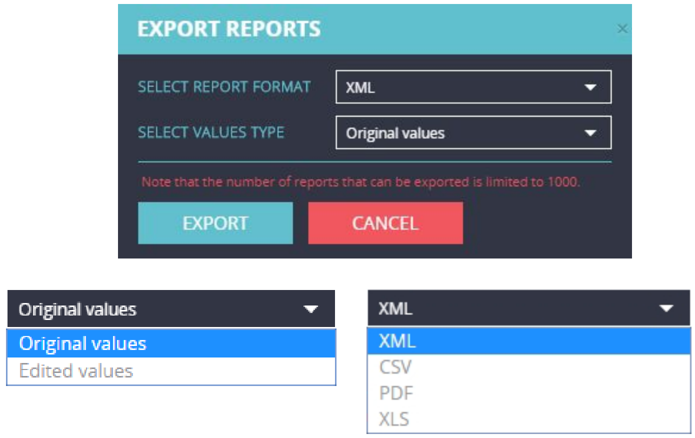

Fig. 5.3.2.1. Export reports

The report can be saved in four different file formats: XML, PDF, CSV and XLS. The user has the possibility to choose between exporting the original version or the edited version of the report.

It is important to notice that the exported files differ in terms of the information contained depending on their format type:

PDF and XML

- report will contain information about all its storage devices, even if the user is interested of a certain device;
- report will contain all existing parameters, regardless of template;

- the name of the parameters cannot be edited;
- parameter order in the document cannot be changed.

CSV and XLS

- report will contain information only about the storage device in which the user is interested to export;
- report will contain only the parameters selected in the current template;
- the name of the parameters can be edited;
- parameter order in the document can be changed according to the template.

5.3.2.1. Export multiple reports

It is possible to export multiple reports at the same time using the controls located beneath the table. The checkboxes located at the beginning of each row helps to easily select the desired reports. Click on the **"Export"** button to proceed with the exporting process. The selected documents will be merged, resulting a single file.

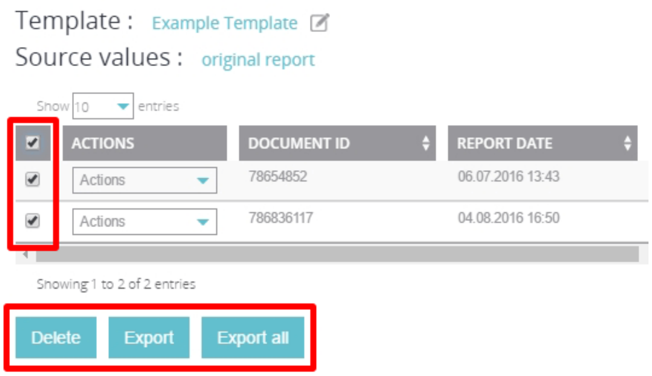

Fig. 5.3.2.1.1. Export multiple reports

Additionally, it is possible to export all the reports from database at once using the **"Export all"** button. *Note that the number of reports that can be exported at once it is limited to 1000.* The export process may take longer if there's a significant number of reports.

5.3.3. Delete reports

Reports can be removed by selecting the **"Delete"** option from the Actions button. The operation needs to be confirmed by hitting **"Confirm"**.

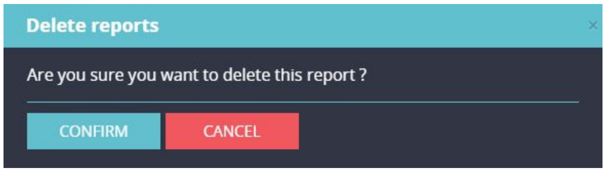

Fig. 5.3.3.1. Delete reports

Additionally, it is possible to remove multiple reports at once by using the button below the table (see fig. 5.3.2.1.1 from **Export multiple reports** chapter).

Note that if an original report is deleted, all its edited versions are also removed, while if an edited report is deleted, only that version will be removed

5.3.4. Report properties

The report properties are available by clicking the **"Properties"** button. The window displayed contains basic information like the document identification number, the name of the person who created the report, the date and time when the document was made and the type of values contained (original or edited).

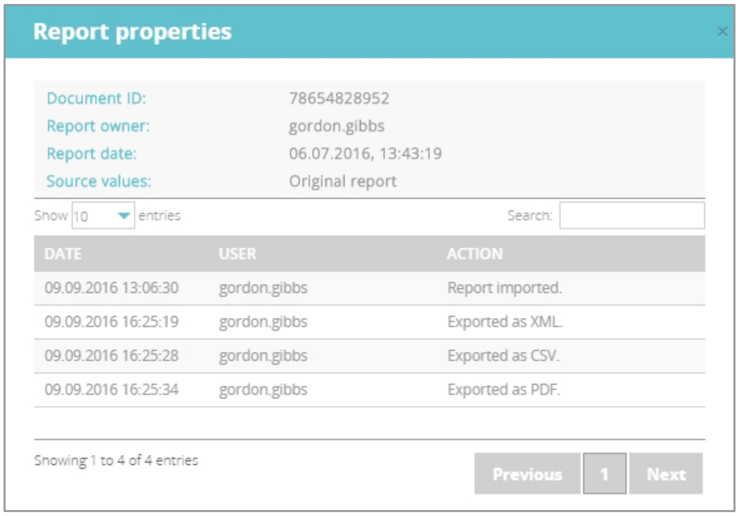

Fig. 5.3.4.1. Report properties

Certain actions on the report are registered in a history which can be seen here. The information is displayed in a table where each row represents a different action which took place. Operations that can be recorded include:

- importation of a report
- editing of a report
- exporting a report (including the file format selected)

The first column displays the date and time when the action took place, the second column shows the name of the user who performed the operation while the last one shortly describes the action.

CHAPTER 6. DOWNLOADS TAB

The Downloads Tab holds different files which we offer for download. The page is divided in two main sections, each containing its related files.

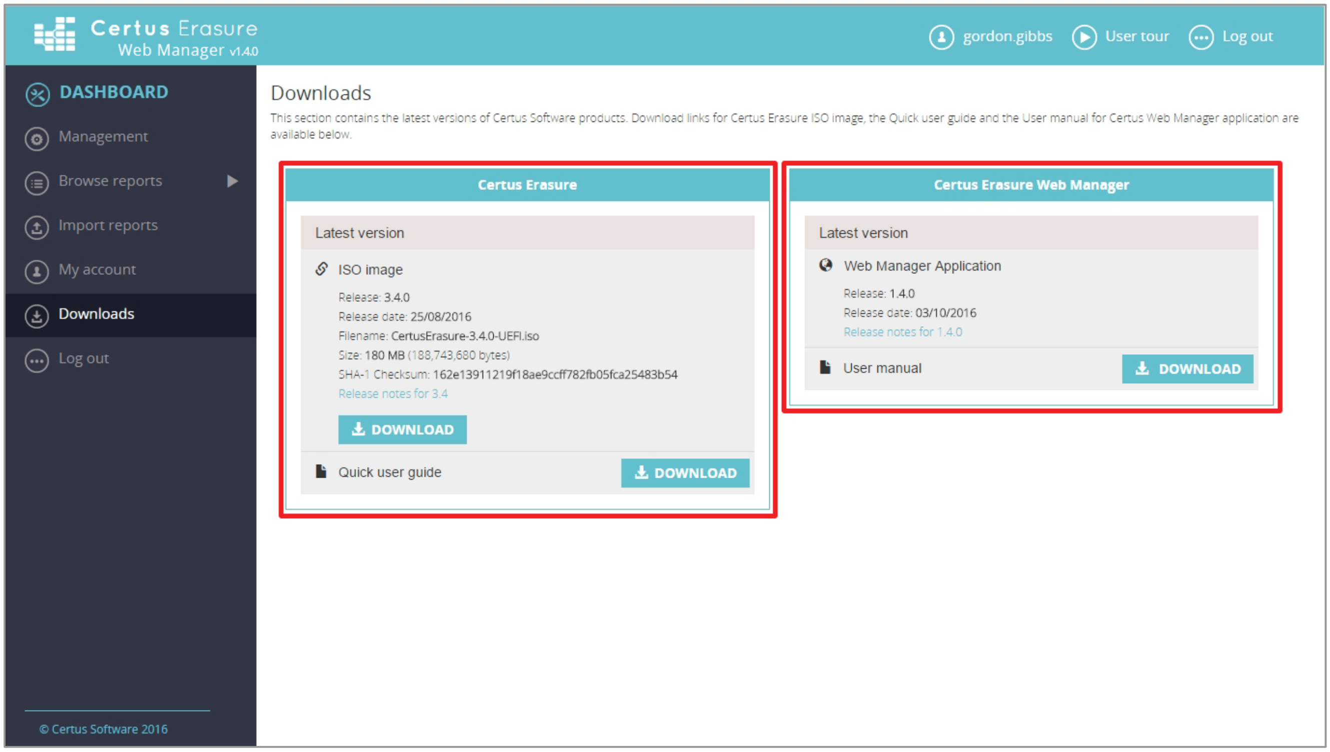

Fig. 6.1. Downloads Tab

The **Certus Erasure** section contains the last ISO image file of our erasure tool and the Quick user guide for it. The **Certus Erasure Web Manager** section refers to the web manager application and contains a link to its User manual.

The latest versions of the software are indicated here. Please check the *Release notes* to find out what changes come up from one version to another.

CHAPTER 7. CONTACT

If you have any questions or if you need our help don't hesitate to submit a technical support ticket using the following button:

SUPPORT

For more information about the latest data erasure products and for contact details, visit the Certus website using the following button:

WEBSITE

We are always looking for ways to improve our products and services. If you have any suggestions, please provide us with your feedback!