



MeltView 2.0 Quick Start Guide

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Overview

MeltView 2 Software provides an integrated system that controls Stanford Research Systems (SRS) Optimelt instruments, manages data and data access as well as provides audit trail capability¹. The software is easy to use with built-in documentation via Help (open with **F1** key) that gives you guidelines on the features and how-tos.

This **Quick Start Guide** provides guidelines to get started with the software. The [System Overview](#) gives you a quick view of the system. Following questions will help you to get to the right documentation.

Which software edition should I use?

Do you need a system that manages users, data access, digital signatures and audit trail? (These features are required for FDA 21 CFR Part 11)

- Yes.

You need to install the **MeltView 2 Pro** edition. Use `MeltView-<version>-Pro-server-x64.exe` and `MeltView-<version>-Pro-client[-x64].exe` installer files. Refer to the [Installation Guide](#) for more information.

- No. I only need to control Optimelt instruments and save data to files.

You need to install the **MeltView 2** (free) edition. Use `MeltView-<version>[-x64].exe` installer file. Refer to the [Installation Guide](#) for more information.

I installed the software. Where do I go from here?

Did you install MeltView 2 or MeltView 2 Pro edition?

- I installed the MeltView 2 Pro.

Refer to [Getting Started with MeltView 2 Pro](#) section (Page 6).

- I installed the MeltView 2 (free edition).

Refer to [Getting Started with MeltView 2](#) section (Page 10).

I need to back up and restore the data. How do I do it?

- With MeltView 2 (free) edition, simply copy the data files (*.opm). The default data directory is `<Documents directory>\MeltViewTemp\`.
- With the MeltView 2 Pro edition, backup and restoring require credentials of a database superuser such as **postgres**. Refer to section [Backup and Restoring of Database](#) (Page 12) of the **Appendix A** for more information.

I forgot the admin password and now I can't login. How do I reset the admin password?

Refer to section [Unlocking Account and Resetting the Password](#) of **Appendix A** for steps to unlock the account.

¹ Data access management and audit trail are available in MeltView 2 Pro version only.

System Overview

The MeltView 2 Software comes with 2 editions: *MeltView 2* (free), and *MeltView 2 Pro*. The *MeltView 2* edition allows users simply acquire data from Optimelt instruments and save the data to files. The *MeltView 2 Pro* edition has more features and can support FDA 21 CFR Part 11. In addition to acquiring data from Optimelt instruments, it allows users to save data from different instruments collected on different computers to a centralized database. Other features include user management and access control, quick data search, sign-off on measurements, and audit trail. The following diagrams illustrate the overview of the 2 editions.

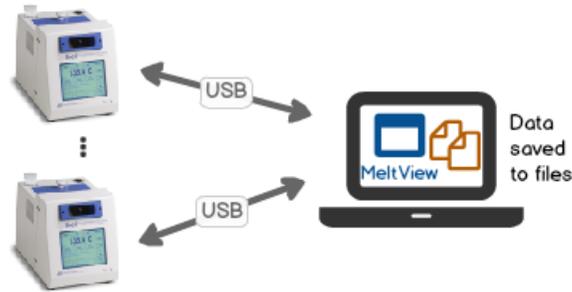
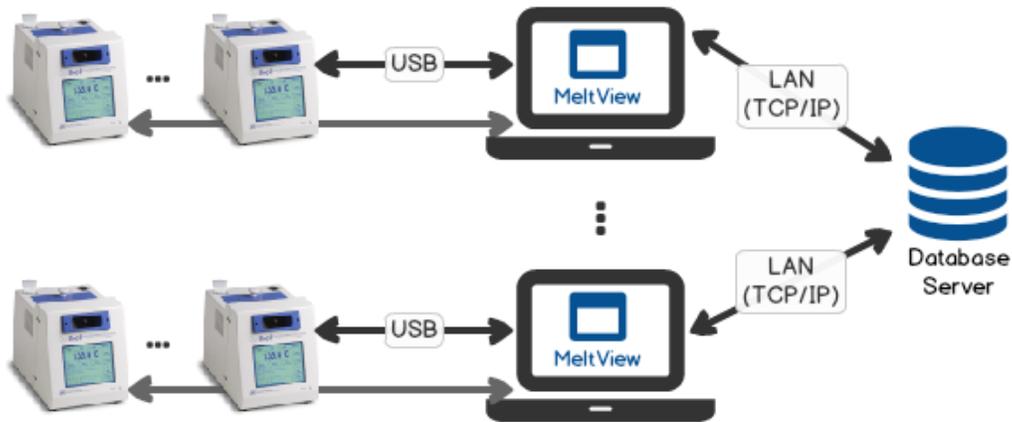


Figure 1 – System overview available in MeltView 2 edition



3 user groups:

-  Superusers: reset, back up & restore database, reset admin password.
Default user: **postgres**.
-  Administrators: manage users, customize system; install licenses, view audit trail.
Default user: **admin**.
-  Regular users: with permissions can operate & calibrate Optimelt instruments, view data, sign-off on measurements, create report, and view audit trail.

Figure 2 – System overview available in Meltview 2 Pro edition

Getting Started with MeltView 2 Pro

The following steps can get you familiar with the system: (1) log in with the default `admin` user; (2) add a new user; (3) log in with the new user; (4) acquire data; and (5) view all acquired data.

① Log in with the default `admin` user

- Launch the *MeltView-Admin* application: Go to **Start** > **[All Programs²]** > **SRS MeltView 2³** > select  **Admin**.
- On the *Authentication* dialog, enter username `admin`, password `admin`. Provide the IP address⁴ and Port number for the database server. If the server resides on the same computer, use `127.0.0.1`. The default port number is `5432`. Click **OK** to log in.
- You will be prompted to change the password the first time you log in. Provide a new password for the `admin` user and proceed.

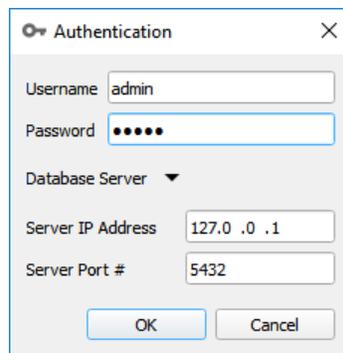


Figure 2 - The Authentication dialog box

② Add a new user

- Once you log in the MeltView-Admin application, click on the  **Users** icon on the sidebar to open the *User* panel.
- Click  **New User** icon to open the *New User* panel.
- Provide the username, first name, last name and optionally other user information.
- Give the user the permissions. Click  **Help** for description of each permission.

*NOTE: It's recommended to give the user at least **Operate**, **View Data**, and **Calibrate** permissions to get started. You can always make changes to the user later.*

² Applies to Windows 7. Skip if you're using other supported Windows operating systems.

³ If you change the start menu folder to a different name when installing, browse to that folder.

⁴ If the database server resides on a different computer, use that computer's IP address. If the firewall is enabled, make sure the firewall allows connections to the computer.

- Make sure the “Reset password” checkbox is checked. **Take note of the temporary password.** You will need this password to log in in the next step. Click **Add User** button to add the new user.

The screenshot shows the 'New User' panel in the MeltView Admin interface. The panel is divided into several sections:

- User Information:** Fields for Username (msmith), Employee ID, First Name (Mary), Email (msmith@company.com), Last Name (Smith), Job Title (Analyst), Middle Name, and Notes.
- Account:** A checkbox for 'Locked', 'Account valid until' (4/23/2020 5:01 PM), and a checked 'Valid always' checkbox.
- User Permissions:** Checkboxes for Operate, Sign, Calibrate, View Data, View Audit, and Manage Users.
- Permitted Signing:** Checkboxes for Authorship, Review, and Approval.
- Password:** 'Password expires after' (4/23/2019), 'Expire the Password' button, 'Reset password to' (TjzGwm31), and 'Generate Temp Password' button.

At the bottom of the panel are 'Add User' and 'Cancel' buttons. The left sidebar shows navigation options: Users, System, Audit Trail, Maintenance, and Help.

Figure 3 - The New User panel.

③ Log in with the new user

- Launch the *MeltView* application: Go to **Start** > **[All Programs⁵]** > **SRS MeltView 2⁶** > select  **MeltView**.
- On the *Authentication* dialog box, enter the username and password of the newly created user from step ②. Provide the same IP address and Port number as in the step ①. Click **OK** to log in.
- You will be prompted to change the password. Provide a new password and proceed.

④ Acquire data

- Connect an Optimelt instrument (MPA100 unit) to the computer and power it on.
- Charge the capillary tubes with a sample, and place them in the Optimelt instrument.

⁵ Applies to Windows 7. Skip if you're using other supported Windows operating systems.

⁶ If you change the start menu folder to a different name when installing, browse to that folder.

- Once you log in the *MeltView* application, the connection dialog box pops up to show the available instruments to connect. Click **Refresh** if your Optimelt instrument is not displayed. Select the instrument and click **Connect**.
- On the *Control* tab of the main window, provide the information for the acquisition: *Chemical Name*, *Batch Number*, *Start Temperature*, *Stop Temperature*, *Heating Rate*, and optionally other parameters. Click **Start** to start acquiring the data.

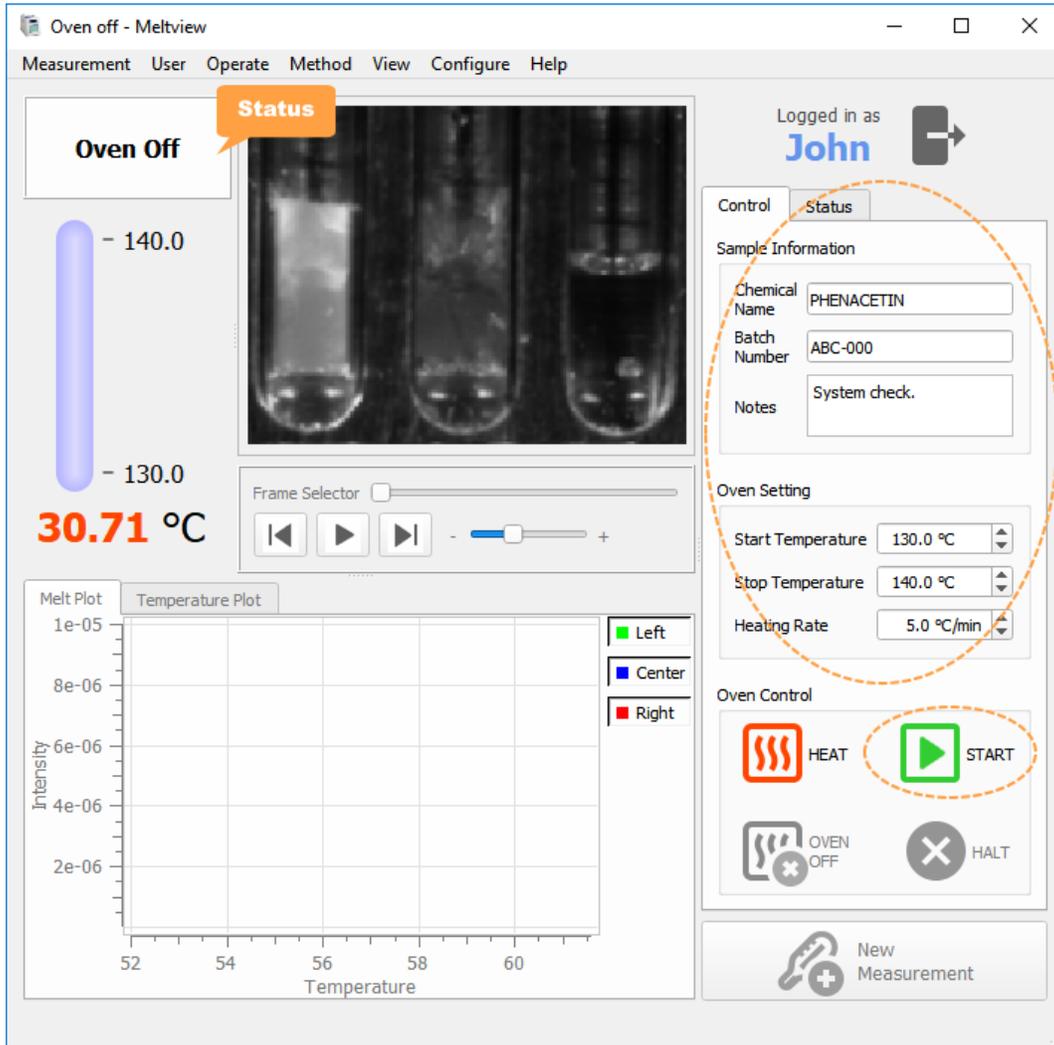


Figure 4 - The main window (MeltView 2 Pro edition).

- The system will start collecting the data once the temperature on the Optimelt instrument reaches the Start Temperature. After the acquisition finishes, the data will be saved to the database, and the **Status** box will show **Viewing New Data**. From this point, you can review the data with the *Melt Plot*, image playback, or other information on the *Status* tab.

⑤ View all acquired data

- To view a list of all acquired data, select menu item **Measurement > Browse Data**. The *Data* dialog box will open to show all the acquired data.
- Select a row to view the detailed information. Use the **Columns** and **Filter** options to customize the view.
- You can also perform other tasks such as signing a measurement, generating a PDF report, opening any previously acquired data.

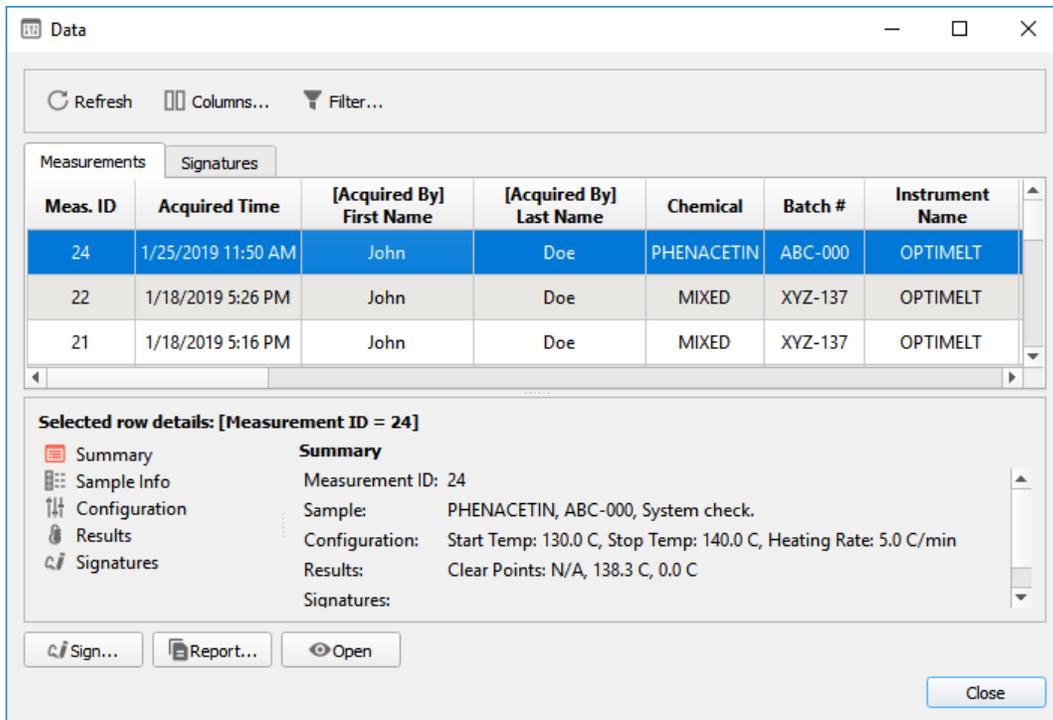


Figure 5 - The Data dialog box.

For further help, press **F1** from the application to bring up the Help browser; or open the documentation link from the start menu folder.

Getting Started with MeltView 2

If you install *MeltView 2 Pro* edition, refer to the section *Getting Started with MeltView 2 Pro* instead.

The following steps can get you familiar with the system: (1) connect an instrument; (2) acquire data; and (3) open saved data.

① Connect an instrument

- Connect an Optimelt instrument (MPA100 unit) to the computer and power it on.
- Charge the capillary tubes with a sample, and place them in the Optimelt instrument.
- Launch the *MeltView* application: Go to **Start** > [**All Programs**⁷] > **SRS MeltView 2**⁸ > select **MeltView**.
- When the *MeltView* application opens, the connection dialog box pops up to show the available instruments to connect. Click **Refresh** if your Optimelt instrument is not displayed. Select the instrument and click **Connect**.

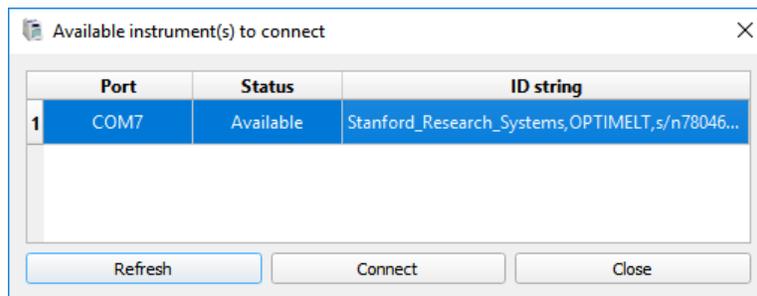


Figure 6 - The connection dialog box.

② Acquire data

- On the *Control* tab of the main window, provide the information for the acquisition: *Chemical Name*, *Batch Number*, *Start Temperature*, *Stop Temperature*, *Heating Rate*, and optionally other parameters. Click **Start** to start acquiring the data.
- The system will start collecting the data once the temperature on the Optimelt instrument reaches the Start Temperature. After the acquisition finishes, the **Status** box will show **Viewing Saved Data**; and by default, the data will be automatically saved to file `<Documents directory>\MeltViewTemp\<Chemical>-<Batch>-<Date>-<Time>.opm`. You can change the *Data Save Directory* on the **Options** menu.
- You can review the data with the *Melt Plot*, image playback, or other information on the *Status* tab.
- Click **New Measurement** for a new acquisition.

⁷ Applies to Windows 7. Skip if you're using other supported Windows operating systems.

⁸ If you change the start menu folder to a different name when installing, browse to that folder.

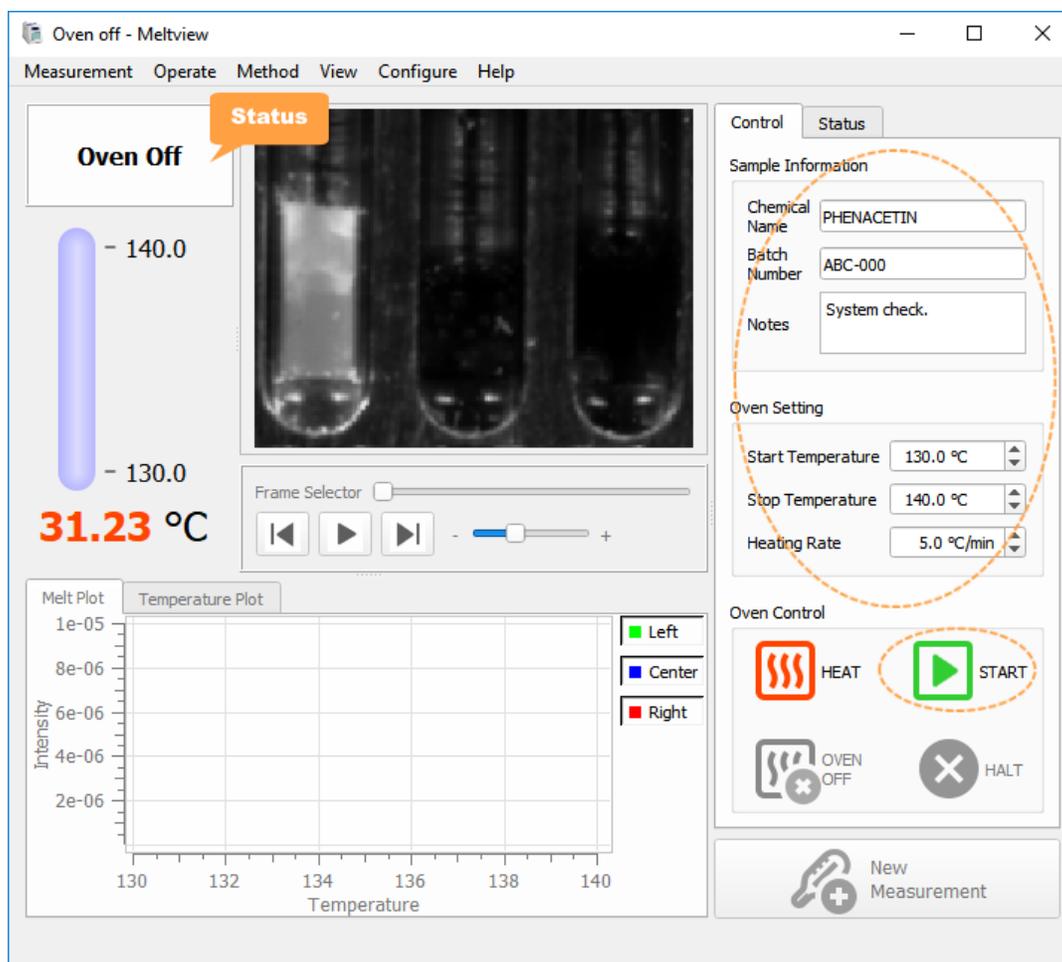


Figure 7 - The main window (MeltView 2 edition).

③ Open saved data

- Go to **Measurement** menu, select **Open**. Browse to select an ".opm" file and click **Open**.
- The data file will be opened. You can review the data with the *Melt Plot*, image playback, or other information on the *Status* tab.
- A camera image, a PDF report, or a text report can be obtained from **Measurement > Export** menu.

For further help, press **F1** from the application to bring up the Help browser; or open the documentation link from the start menu folder.

Appendix A

Backup and Restoring of Database

Database backup and restoring must be done on the local machine where the database server is installed. The operations require credentials of database superusers such as **postgres**. Follow steps below to get to the *Maintenance* panel on the *Admin* app.

- Launch the *MeltView-Admin* application: Go to **Start** > [All Programs⁹] > **SRS MeltView 2¹⁰** > select  **Admin**.
- Log in using an administrator account such as **admin**.
- Press  **Maintenance** button on the side bar to activate the *Maintenance* panel. Select either **Database Backup** or **Database Restore** on the *Maintenance* panel to carry out the operation. For further help, press **F1** to bring up the Help browser.

Unlocking Account and Resetting the Password

If your login is unsuccessful and you reach the allowable failed login attempts, your account will be locked. When your account is locked, subsequent logins will be denied, even with a correct password. The lock applies to all users, including the default `admin` user.

If you have multiple administrator users in the system, you can log in with one administrator account and unlock the other. If you have just the default `admin` user, you would need a superuser such as the default superuser `postgres` to unlock the account and reset the password of the `admin` user.

Locating the Unlock Script

When you install MeltView 2 Pro by running a `MeltView-<version>-Pro-client[-x64].exe` installer file, an unlock script is created under the installation directory such as `"C:\Program Files[(x86)]\Stanford Research Systems\MeltView2\scripts"`¹¹. The script can unlock the account and set a temporary password for the user. You must run the script on a system that has PostgreSQL 10 installed. The PostgreSQL 10 is installed when you install the database server so you can run the script on the server computer.

NOTE: Due to security precaution, the unlock script does not reset the expiration date of the account. Therefore, if the account is expired, you cannot log in even if the account is unlocked.

Executing the Unlock Script

To run the unlock script, first open a **Command Prompt (Start > Run > type `cmd`)**, then run the script as follows:

⁹ Applies to Windows 7. Skip if you're using other supported Windows operating systems.

¹⁰ If you change the start menu folder to a different name when installing, browse to that folder.

¹¹ The path can be different if you chose to install the program under a custom directory.

```
> cd <installDirectory>\scripts  
> unlock.bat <username> <tempPwd> [<host> [<port> [<superuser>]]]
```

For example, to unlock user `admin` using the superuser `postgres` on the database server located on the local host, run:

```
> cd "C:\Program Files\Stanford Research Systems\MeltView2\scripts"  
> unlock.bat admin adminTempPassword
```

To unlock the user `admin` on the database server located at `192.168.1.120`, port `5500` using superuser `postgres`, run:

```
> cd "C:\Program Files\Stanford Research Systems\MeltView2\scripts"  
> unlock.bat admin adminTempPassword 192.168.1.120 5500
```

NOTE: If the user account is locked because of multiple failed logins, the user will have exactly ONE chance to log in with the new temporary password. The failed login attempt counter is reset only if the user successfully logs in. Another failed login will trigger the account lock.
