Welch Allyn Service Dashboard

Administrator guide

Welch Allyn®

Advancing Frontline Care™

© 2016 Welch Allyn. All rights are reserved. To support the intended use of the product described in this publication, the purchaser of the product is permitted to copy this publication, for internal distribution only, from the media provided by Welch Allyn. No other use, reproduction, or distribution of this publication, or any part of it, is permitted without written permission from Welch Allyn. Welch Allyn assumes no responsibility for any injury to anyone, or for any illegal or improper use of the product, that may result from failure to use this product in accordance with the instructions, cautions, warnings, or statement of intended use published in this manual.

Welch Allyn and Connex are registered trademarks of Welch Allyn. ProBP, Vital Signs Monitor 6000 Series, and PartnerConnect are trademarks of Welch Allyn.

EarlySense is a registered trademark of Early Sense Ltd.

Software in this product is Copyright 2016 Welch Allyn or its vendors. All rights are reserved. The software is protected by United States of America copyright laws and international treaty provisions applicable worldwide. Under such laws, the licensee is entitled to use the licensed software as intended in its directions for use. The software may not be copied, decompiled, reverse-engineered, disassembled, or otherwise reduced to human-perceivable form. This is not a sale of the software or any copy of the software; all right, title, and ownership of the software remain with Welch Allyn or its vendors.

For information about any Welch Allyn product, contact Welch Allyn Technical Support: www.welchallyn.com/support.

DIR 80021241 Ver. A

Revision date: 2016-01

Welch Allyn Service Dashboard Administrator Guide

Welch Allyn, Inc.
4341 State Street Road
Skaneateles Falls, NY 13153-0220
USA

www.welchallyn.com

EC REP

Regulatory Affairs Representative
Welch Allyn Limited
Navan Business Park
Dublin Road
Navan, County Meath
Republic of Ireland

Welch Allyn®
Advancing Frontline Care™

Contents

About this guide 1
Browser and device compatibility 1
Service Dashboard IT setup 2

Introduction 3
Configuration overview 3

Navigating the service dashboard 5

Using the Service Dashboard client application 7
Sign in and sign out 7
Use the Service Dashboard links 8
Access the Device list 8
Access Device details 10
Access and print reports 12
Access and deploy CVSM configuration and custom data files 13
Access and deploy CSM configuration and custom data files 14
Upgrade firmware (Connex Spot Monitor only) 15

About this guide

This guide provides instructions for using the Welch Allyn Service Dashboard, which you can find at https://www.connexdashboard.com. The audience for this guide is biomeds or other service professionals involved in the maintenance and service of Welch Allyn devices.

For information on using the devices that connect to the system, consult the directions for use and service manuals that came with the devices or visit our product catalog at http://www.welchallyn.com.

Browser and device compatibility

The Welch Allyn Service Dashboard is compatible with the following browsers:

- Internet Explorer, versions 9, 10, and 11
- Google Chrome, version 47
- Apple Safari: iOS 8.3

The Welch Allyn Service Dashboard can be used to track maintenance and service activity on the following Welch Allyn devices:

- NCE (Network Connectivity Engine) - compatible middleware that can host the Service Monitor
- CVSM (Connex® Vital Signs Monitor)
- CIWS (Connex® Integrated Wall System)
- CSM (Connex® Spot Monitor)
- ESS (EarlySense® Sensor)
- ProBP™ 3400
- Connex® CS (Central Station)
    - Server
    - Client
    - Standalone

Service Dashboard IT setup

Installed Welch Allyn service component	Required outbound network Domain name IP address Port
Service Dashboard	https://connexdashboard.com IP: 209.202.186.109 HTTP port: 443 https://config.welchallyn.com/configurator/common/showVerification.action
File outbound types	.log, .xml, .zip, .txt
File inbound types	.tar.gz, .tar, .seq, .wsf, .pim, .xml, *.txt, *.pdf

Introduction

The Welch Allyn Service Dashboard is a browser-based user interface that collects, organizes, and displays critical maintenance and service information for your Welch Allyn devices in a readable, user-friendly way. The Service Dashboard enables you to do the following:

- sign in and sign out
- access device status and configuration information
- receive notifications for upcoming and overdue preventive maintenance
- track or locate specific devices
- edit device details
- download log files
- access usage summary and firmware reports for devices
- deploy configuration files to selected devices
- upgrade firmware (Connex Spot Monitors only)
- follow a link to the Global Service Center home page
- follow a link to the Welch Allyn Technical Support page.

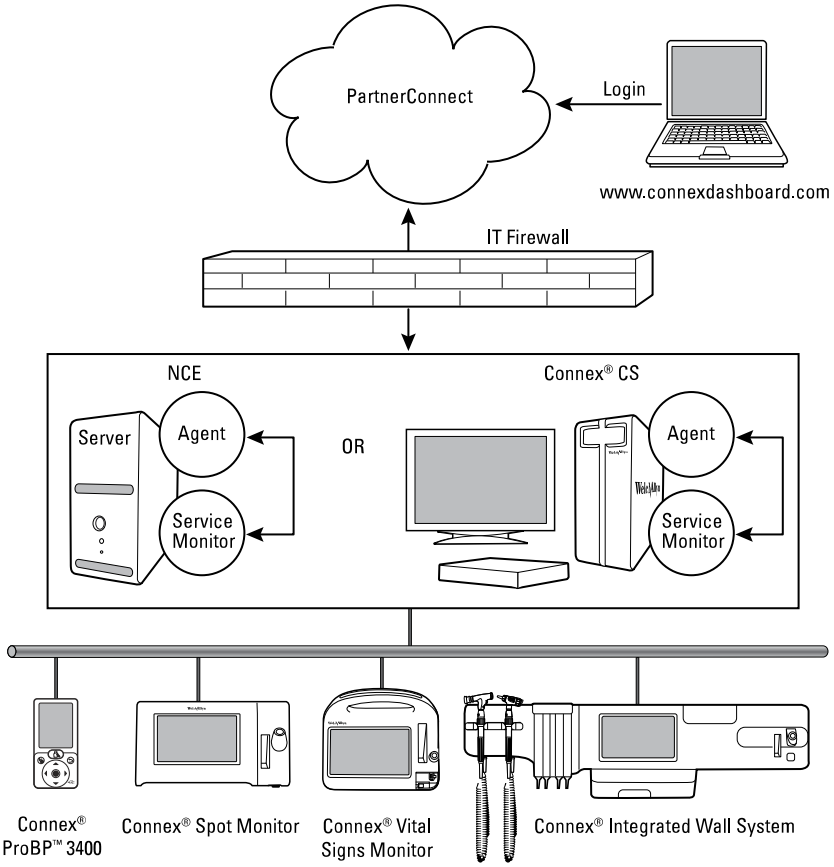
To use this Administrator Guide, you should have already installed PartnerConnect software and completed initial setup and registration on your system.

This guide provides an overview of how the Service Dashboard operates and covers key tasks you can complete using the Service Dashboard.

Configuration overview

After installing the PartnerConnect remote access software on your system and receiving the required credentials, you can open the Welch Allyn Connex Service Dashboard in a compatible browser and access the PartnerConnect server, a cloud-based data center. PartnerConnect uses the HTTPS secure internet protocol to communicate with the WelchAllyn service cloud.

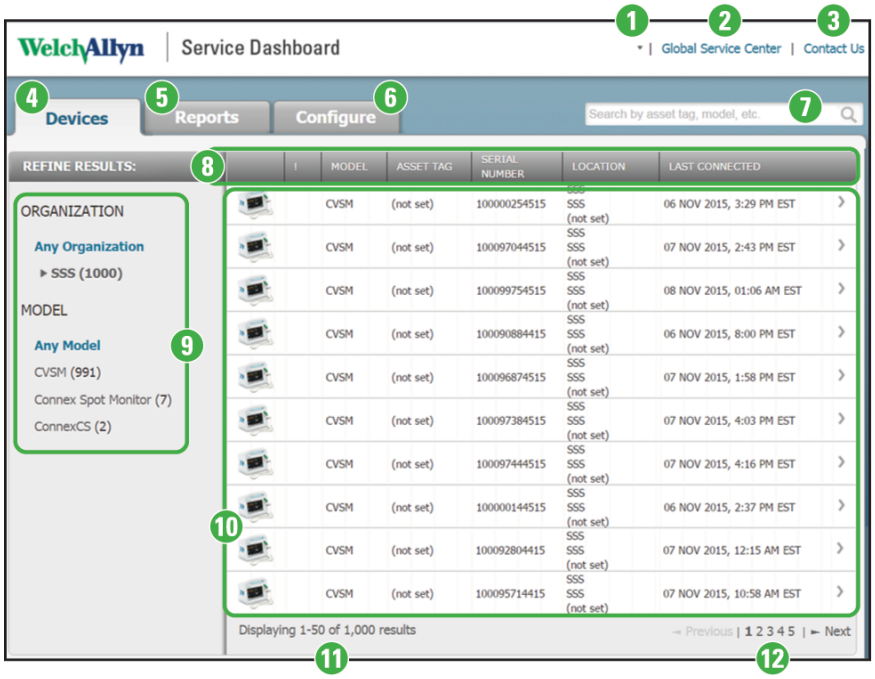
The Service Monitor software can be installed on either an NCE (Network Connectivity Engine) or Connex CS server. The Service Monitor relays technical and service messages and files both to and from the medical device and the Connex Dashboard Server (PartnerConnect). The PartnerConnect Agent, installed locally, only sends device-specific service data—never patient identifiable data—out of your network.



Welch Allyn devices that are compatible with the Service Dashboard appear in this illustration. Connections to your network, whether wired or wireless, vary by configuration and/or device type. For any of these Welch Allyn devices at your facility, the Service Dashboard provides quick access to device data stored in the PartnerConnect data center. In addition, the Service Dashboard facilitates deploying configuration files to the monitors in your system (Connex Vital Signs Monitor and Connex Spot Monitor). It also enables you to push firmware upgrades to the Connex Spot Monitor.

Navigating the service dashboard

The Service Dashboard's graphical user interface provides tabs, filters, a search box, and hyperlinks as navigational tools. A sample Service Dashboard screen with callouts identifying key features appears below.



No.	Feature	Description
1	Account/User link	Displays the user's name after logging in. Provides a Sign out link to exit the Service Dashboard.
2	Global Service Center link	Opens a new window and navigates to the Services & Support page on welchallyn.com.
3	Contact Us link	Opens a new window and navigates to the Contact Us page on welchallyn.com.
4	Devices tab (currently active)	If the Devices tab is not active, navigates to the Devices screen. Displays a list of devices filtered by organization, location, or model; or based on search criteria.
5	Reports tab	If the Reports tab is not active, navigates to the Reports screen.

No.	Feature	Description
6	Configure tab	If the Configure tab is not active, navigates to the Configure screen.
7	Device search box	Enables you to enter a query based on model, asset tag, serial number, or location. Search box queries override filters; you must delete any queries from the search box to enable filters.
8	Device list column headers	Enable sorting and presentation of device data by category in ascending or descending order by clicking on the header. Sorting within columns occurs as follows: • thumbnail image – not sortable • notification (!) – by priority level • model – alphanumerically by model name • asset tag – alphanumerically by asset tag • serial number – alphanumerically by serial number • location – alphanumerically first by facilty/organization name, then by location/unit, then by room and bed (if those details are available) • last connected – not sortable
9	Device list filters	Enable you to narrow the device list according to facility/ organization, location/unit, and/or model. By default, no filters are selected at the start of a new session. The most recently used set of filters persists throughout an active session unless you use the search box, which clears all filters.
10	Device list data	Provides at-a-glance information of each device based on filters or searches. Clicking anywhere in a specific device's row navigates to the Device Details screen.
11	Search/filter results	Indicate number of results displayed on the page of the total number of results. A maximum of 50 results can be displayed on a page.
12	Pagination controls	Enable navigation from one page of results to another.

Using the Service Dashboard client application

This section addresses the following tasks:

- Sign in and sign out
- Use the Service Dashboard links
- Access the Device list
  - Filter the Device list
  - Use the search box
- Access Device details
- Access and print reports
- Access and deploy CVSM configuration and custom data files
- Access and deploy CSM configuration and custom data files
- Upgrade firmware (Connex Spot Monitor only)

Sign in and sign out

These instructions assume that you have already established a PartnerConnect account and have credentials to access the Service Dashboard. If this is not the case, contact Welch Allyn Technical Support (https://www.welchallyn.com/en/other/contact-us.html) to set up these credentials.

1. Open an internet browser and enter the Service Dashboard URL: www.connexdashboard.com.

   The Service Dashboard splash screen and login window appear.
2. Enter your email address and password for this site, then click **Sign in**.

   The dashboard opens to the Devices tab.

   Note By default, the Service Dashboard presents an unfiltered Device list at the start of a new session.

To exit the Service Dashboard...

1. Click the Account/User link at the top of the screen (look for your username).
2. Click **Sign out** in the popup window.

Use the Service Dashboard links

The Service Dashboard includes two useful links to assist you.

1. To access the Service & Support page on the Welch Allyn website, click **Global Service Center**.

   This link is available on every Service Dashboard screen, including the splash screen where you sign in. This link provides quick access to service information, documentation for your device, and other self-help tools. This page opens in a separate window.
2. To contact Welch Allyn with questions or concerns, click **Contact Us**.

   This link is available on every Service Dashboard screen *after you sign in*. This link provides quick access to customer service and technical support for your region, as well as helpful links for specific groups like physicians, veterinarians, hospitals, students, governments, and distributors. This page opens in a separate window.

Access the Device list

The Device list provides a complete listing of equipment associated with your Account/User ID in PartnerConnect. This list opens automatically when you sign in to the Dashboard.

To access the Device list from any other screens in the Dashboard, click the **Devices** tab.

Filter the Device list

Filtering enables you to refine the Device list by organization, which might be subdivided further into location and facility, as well as by model. If no devices match a specific filter category, that filter does not appear under "REFINE RESULTS:" in the left column.

By default, no filters are applied at the start of a Service Dashboard session, but you can apply filters at any time during your session. Once you apply filters, they persist throughout a session until you modify them or execute a search. Your filter selections appear under the heading "DISPLAYING RESULTS FOR:" in the left column, presented in order from the most general to the most specific.

The steps below are presented in a sequence moving from the most general to the most specific filter options, but you can filter by model alone and in some cases with a subset of the other available filters.

1. To filter the Device list by organization, click the first expandable link under ORGANIZATION. (Look for the triangle marker.)

   The organization filter appears under DISPLAYING RESULTS FOR: at the top of the column.
2. To filter the Device list by location, click the first expandable link under LOCATION. (Look for the triangle marker.)

   The location filter appears below the organization filter under DISPLAYING RESULTS FOR: at the top of the column.
3. To filter the Device list by facility, click a selection under FACILITY.

   The facility filter appears below the location filter under DISPLAYING RESULTS FOR: at the top of the column.

4. To filter the Device list by model, click a selection under MODEL.

   The model filter appears below the facility filter under DISPLAYING RESULTS FOR: at the top of the column.
5. To modify filter selections, click the **x** next to any filters you want to remove, and/or select other filters presented under "REFINE RESULTS:".

The Device list data presented changes based on filters applied and includes the following details:

- thumbnail image
- notification (!)
- model
- asset tag
- serial number
- location
- last connected

Device list data can be sorted by clicking in selected columns. Unsortable columns are the thumbnail image column and LAST CONNECTED. In addition, if more than 50 results appear in your list, pagination controls at the bottom of the screen provide navigation to additional Device list data.

Use the search box

Another way to refine the Device list is to use the search box and enter a query that will look for a match in a device's model name, asset tag, serial number, assigned location, or connection information. Entries in the search box immediately clear any applied filters.

1. Place your cursor in the search box and enter the alphanumeric characters for your query.

   With each character you enter, the results displayed change to present all devices with data that exactly match your query. Note that partial serial numbers, dates, and words might be sufficient to narrow your results.
2. Modify the search by editing your query. To clear the query, click the **x** in the search box.

If no devices match the search query, the screen displays the message, "No matching records found."

Notification symbols overview

The following icons appear in the Notifications column of the Device list if the device meets the criteria presented in the description. Hovering over these icons opens a Preventive Maintenance tooltip providing quick access to replacement information and status.

	Replacement Information. This icon is displayed for devices that have known expiration data.
	Replacement Due. This icon is displayed for devices that are due for replacement within the next 30 days.
	Replacement Overdue. This icon is displayed for devices that are past due for replacement.

Access Device details

You can access detailed information about a specific device on the Device tab as follows.

1. Use filters or a search query as desired to refine the Device list data presented onscreen.
2. Click anywhere in a specific device's row to open its Device Details screen.
3. Scroll through the Device Details screen to find the specific information you need. (See the table later in this topic.)
4. To open the Edit Details window, click **Edit details**.

   Note If devices have a fixed location, you can modify and save room and bed details in this window. This information is saved only on the dashboard server for tracking purposes and is not pushed to the device.

5. To open the Download logs window, click **Download logs**, select the type of log you want to download and the date(s), if applicable, and click **Download**.

   Note For CSM devices, a .zip file containing the requested logs appears in your downloads tray. For CVSM and CIWS devices, a window opens displaying the requested log messages. No logs are available for ProBP 3400 devices.

The Device Details screen varies by device type, as shown in this table.

Device	Device details
CVSM (Connex Vital Signs Monitor) CIWS (Connex Integrated Wall System)	Device Details Summary[1] PREVENTIVE MAINTENANCE SCHEDULE[2] DEVICE INFORMATION[3]

Device	Device details
CSM (Connex Spot Monitor)	Device Details Summary[4] PREVENTIVE MAINTENANCE SCHEDULE[2] DEVICE INFORMATION[3]
ProBP 3400	Device Details Summary[5] DEVICE INFORMATION[3]
ESS (EarlySense Sensor)	Device Details Summary[6] PREVENTIVE MAINTENANCE SCHEDULE[2] DEVICE INFORMATION[3]
Connex CS Server Connex CS Standalone	Device Details Summary[7] ABOUT[8] • System • Licenses • Services • Software AUDIT LOG[9]
Connex CS Client	Device Details Summary[7] ABOUT[8] • System • Services • Software AUDIT LOG[9]

[1] This block presents details from the Device list as well as REF, Location ID, IP and Ethernet MAC addresses, Radio IP address, Last Customization Deployed, Last Configuration Deployed, and Connection Status. It also includes two buttons: Edit details and Download logs.

[2] This table presents calibration and replacement schedules and status.

[3] This table presents expandable fields that display more specific component details.

[4] This block presents details from the Device list as well as REF, Location ID, IP and Ethernet MAC addresses, Room/bed, Last Configuration Deployed, and Connection Status. It also includes two buttons: Edit details and Download logs.

[5] This block presents details from the Device list as well as REF, IP and Ethernet MAC addresses, Radio IP address, and Connection Status. It also includes one button: Edit details.

[6] This block presents details from the Device list as well as REF, Last Connected To (monitor to which device was last connected), and Connection Status.

[7] This block presents details from the Device list as well as Location ID, Version, IP and Ethernet MAC addresses, System Up Time, and Connection Status. It also includes two buttons: Edit details and Download logs.

[8] Each of the menu options in this section (see bullets) presents more specific details in the content area of the table.

[9] This table presents all audit log entries generated in the last 7 days. Up to 10 audit logs can be displayed on a page. If more than 10 audit logs have been generated, pagination controls appear to provide access to those logs. If no audit logs have been generated, the table presents the message "No data available in table."

Access and print reports

You can access and print detailed usage and firmware information on the Reports tab as follows.

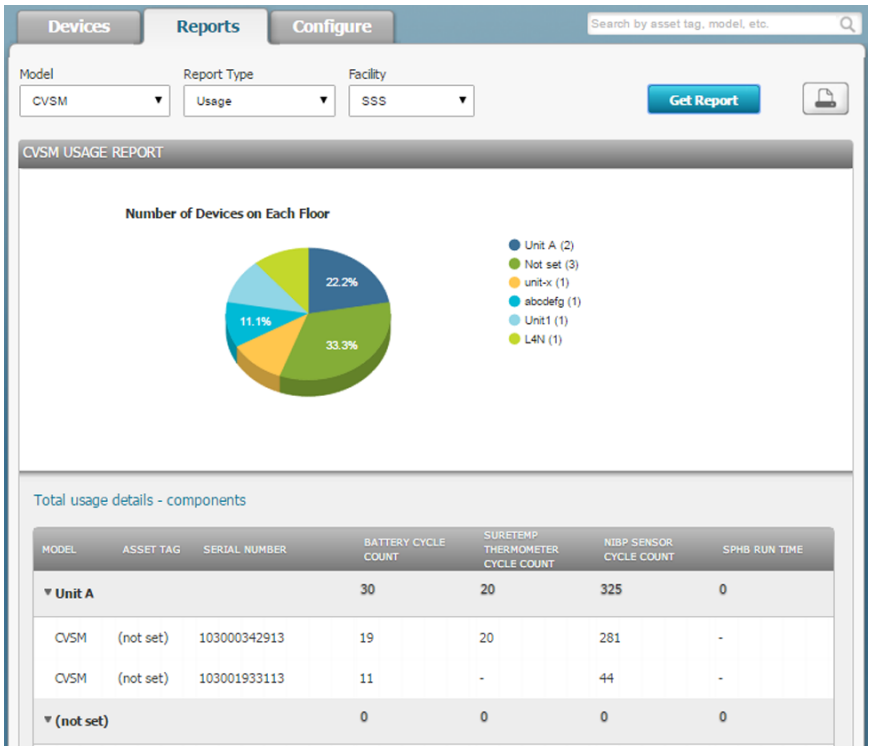
1. Click the **Reports** tab.
2. At the top of the Reports tab, select the desired Model, Report Type, and Facility[1] to filter your results.

   Options:

   - Model: device types linked to the dashboard
   - Report Type: usage and firmware
   - Facility[1]: varies by location
3. Click **Get Report**.

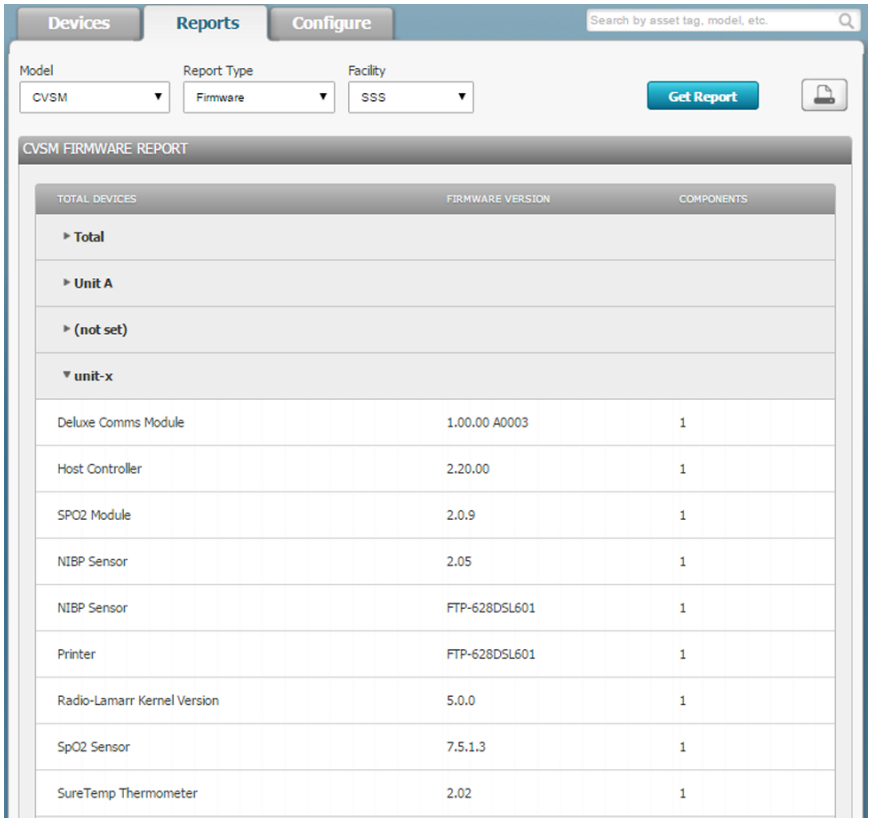
   The screen refreshes and displays the selected report. (The examples below are cropped to support presentation on the page.)

   - Usage (pie chart of devices by floor/location, followed by cycle count and run time information for each device as well as total for all devices by floor/location)



[1] only available if already specified in PartnerConnect

- Firmware (firmware report with a complete list of components and firmware versions presented in expandable fields under "Total," followed by list of components and firmware versions presented in expandable fields by floor/ location)



4. Scroll through the tables and expand fields to find the specific information you need.
5. To print a report, click , then click **Print** in the Windows Print window.

Note The printed report displays only the details that appear on screen. Expand fields to reveal hidden data you want to include in printed reports.

Access and deploy CVSM configuration and custom data files

The Service Dashboard enables you to deploy or "push" saved configuration files to one or more monitors in your facility. To complete a deployment to Connex Vital Signs Monitors (CVSMs), a Biomed or other authorized user must first save or push the desired configuration file to PartnerConnect from a specific CVSM device.

Note If the configuration includes custom data, a separate custom data file is transmitted at the same time you push the configuration file to PartnerConnect.

1. Click the **Configure** tab.
2. Click the **CVSM** filter in the REFINE RESULTS: column.

A list of saved configuration and custom data files populate the table. Tags on these files reveal their types:

- Configuration filenames end with the tag "_CONFIG.PMP.settings"
- Custom data filenames end with the tag "_CustomData.xml.settings"

3. Click on the desired filename and click **Deploy**.

   The Configure tab refreshes and presents the selected file at the top of the screen and a list of CVSM devices in your facility eligible to receive the configuration file.

4. Select one or more devices in the list and click **Deploy**.

   The list of saved CVSM configuration files reappears. A confirmation message also appears: "The Configuration file has been pushed to # devices."

5. Click the **x** in the confirmation window to dismiss the message.

6. To confirm that the configuration file has been pushed to the device(s), click the **Devices** tab and select each device to which you pushed the configuration.

   In the Device Details summary at the top of the page, "Last Configuration Deployed" or "Last Customization Deployed" displays the most recently deployed filename and should match the configuration or custom data file you selected.

   Note Deployed configuration or custom data files may not be active immediately on your device(s). These files remain in a queue to be loaded on the selected devices until they "call home." Connecting to PartnerConnect is required to load these files on the device(s).

Access and deploy CSM configuration and custom data files

The Service Dashboard enables you to deploy or "push" saved configuration files to one or more monitors in your facility. To complete a deployment to Connex Spots Monitors (CSMs), you can either push an already saved configuration file the same as you would a CVSM configuration file, or you can create a new one using a link to the Welch Allyn Product Configuration Tool.

1. Click the **Configure** tab.
2. Click the **CSM** filter in the REFINE RESULTS: column.

   A list of saved configuration files populate the table. Unlike CVSM files, CSM files don't follow any special naming conventions. In addition, custom data is part of the configuration file.

3. **If you see the configuration file you want to deploy**, complete these steps:
   a. Click on the desired filename and click **Deploy**.

      The Configure tab refreshes and presents the selected file at the top of the screen and a list of CSM devices in your facility eligible to receive the configuration file.

   b. Select one or more devices in the list and click **Deploy**.

      The list of saved CSM configuration files reappears. A confirmation message also appears: "The Configuration file has been pushed to # devices."

   c. Click the **x** in the confirmation window to dismiss the message.

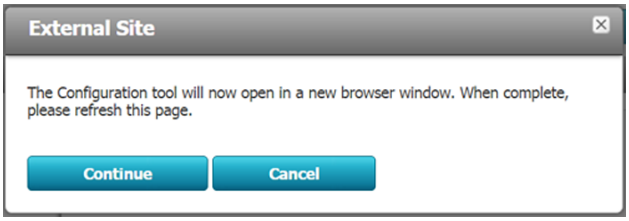
d. To confirm that the configuration file has been pushed to the device(s), click the **Devices** tab and select each device to which you pushed the configuration.

In the Device Details summary at the top of the page, "Last Configuration Deployed" displays the most recently deployed filename and should match the configuration or custom data file you selected.

Note Deployed configuration or custom data files may not be active immediately on your device(s). These files remain in a queue to be loaded on the selected devices until they "call home." Connecting to PartnerConnect is required to load these files on the device(s).

4. **If you want to create a new configuration file**, click **Create**.

The following popup window appears.



5. Click **Continue**.

The Welch Allyn Product Configuration Tool opens in a new window.

Note See the *Welch Allyn Connex Spot Monitor Service Manual* for instructions to use the Configuration Tool.

6. Return to **Configure** tab in the Service Dashboard and refresh the page.

The configuration file appears in the results table.

Note The newly created configuration file will appear on the Service Dashboard only if you have completed Customer Verification and associated your configuration with ordered products. If you don't see the configuration file in the results table, you should complete Customer Verification manually in the Product Configuration Tool. Contact Customer Service if you need assistance.

7. Complete step 3 to push the selected configuration.

Upgrade firmware (Connex Spot Monitor only)

The Service Dashboard enables you to upgrade firmware on one or more Connex Spot Monitors (CSMs) when Welch Allyn pushes new firmware to PartnerConnect.

Note Firmware upgrades using the Service Dashboard are only possible with Connex Spot Monitors.

1. Click the **Configure** tab.
2. Click the **CSM** and **Upgrade** filters in the REFINE RESULTS: column.

If any firmware upgrades are available, they will appear in the results table.

3. Click on the desired filename and click **Deploy**.

The Configure tab refreshes and presents the selected file at the top of the screen and a list of CSM devices in your facility eligible to receive the upgrade.

4. Select one or more devices in the list and click **Deploy**.

   A confirmation message appears: "The Upgrade file has been pushed to # devices."

5. Click the **x** in the confirmation window to dismiss the message.

Note Deployed firmware upgrades may not be active immediately on your device(s). These files remain in a queue to be loaded on the selected devices until they "call home." Connecting to PartnerConnect is required to load these files on the device(s).