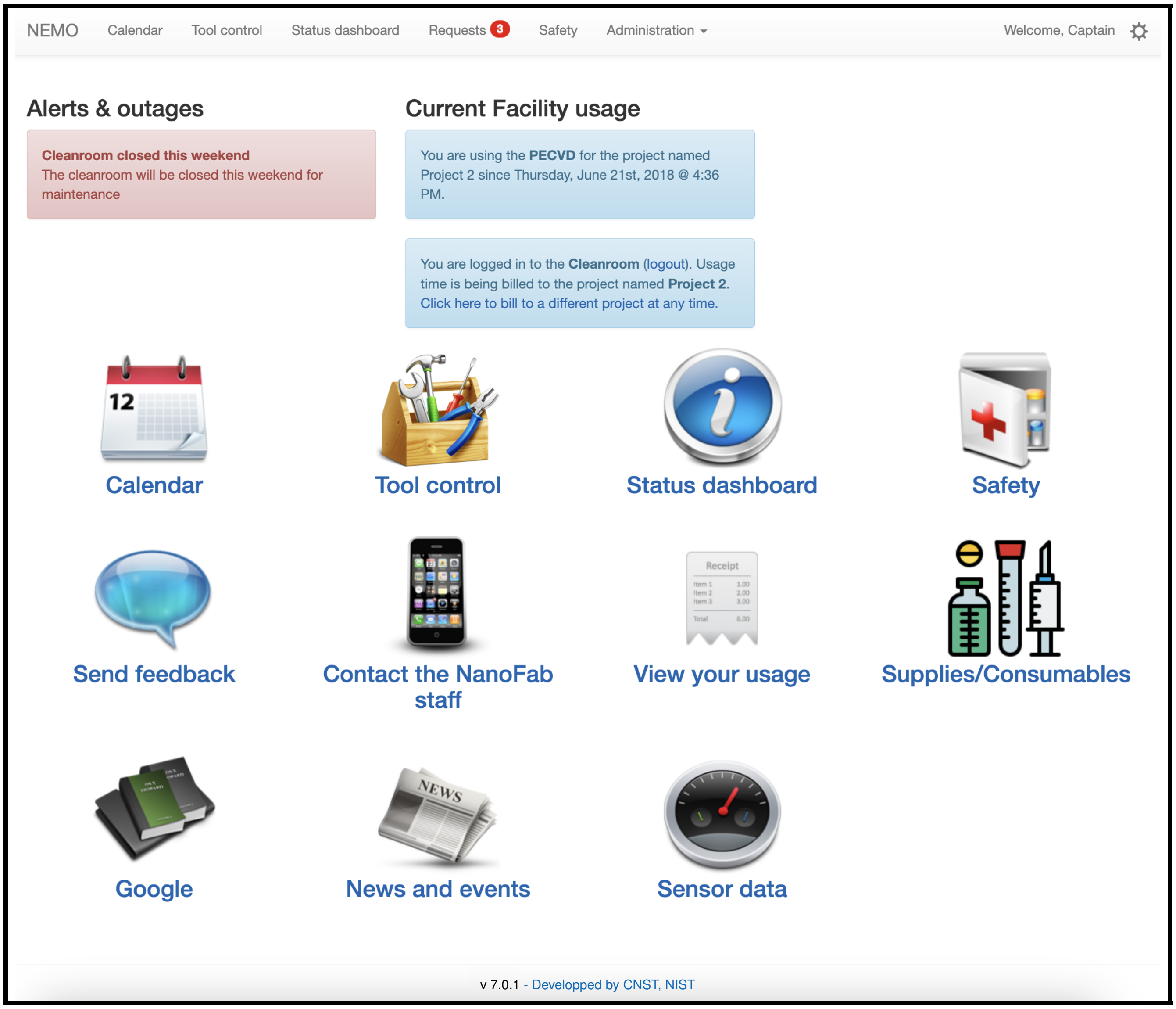


NEMO Feature Manual

VERSION: 7.0.1

GitHub: https://github.com/usnistgov/NEMO

Date: 2025-02-24

National Institute of Standards and Technology

Contents

CONTENTS

Foreword

The National Institute of Standards and Technology (NIST), Center for Nanoscale Science and Technology (CNST) NanoFab provides researchers with rapid access to state-of-the-art, commercial nanoscale measurement and fabrication tools and methods, along with associated technical expertise, at economical hourly rates. It is well equipped to process and characterize a wide range of nanoscale materials, structures, and devices.

In November 2013, CNST replaced its original lab management software with an in-house designed and developed web application. The NEMO web application is laboratory logistics software that strives to be intuitive and easy to use, making life easier in the lab. NEMO manages tool reservations, controls access to areas and tools, and streamlines logistics and communication. The program is being actively developed with new features, improvement, and bug releases approximately once a month.

NEMO is an open-source code released under the NIST Software License. NEMO is free to use and modify, so that other labs can benefit from its development. The NEMO code is hosted at https://github.com/usnistgov/NEMO. The web application is written in the Python programming language and uses the Django web framework. NEMO is system independent (can run on Linux, Windows, or Mac) and does not require special hardware to operate.

NEMO is a customizable laboratory logistics software that allows users to reserve tools, view the operating status of instruments, and seek assistance from laboratory staff. NEMO can be customized to meet the specific needs of any business or laboratory. The software package has hundreds of customizable features, including the ability to:

- create custom user roles and permissions
- define the types of areas and instruments that can be reserved
- set up alerts for when instruments are in need of maintenance
- integrate with other laboratory sensors and systems

NEMO is a web-based application, so it can be accessed from any device with an internet connection. This makes it easy for users to reserve tools, view the status of instruments, and get help from laboratory staff, regardless of their location.

The CNST is looking to create a community of developers to collaborate on new features and improvements to NEMO. The community will allow for more rapid development, create a more vibrant and engaged community around NEMO, and help to ensure that NEMO meets the needs of a wider range of users, from researchers and educators to industry professionals.

Source code contributions are welcome via GitHub pull requests. We will review and evaluate these suggestions, and make changes to NEMO as needed. We will give priority to contributions that are well-written, well-tested, and consistent with the NEMO coding style.

The CNST believes that a developer community is essential for the continued development of NEMO. By working together, developers can improve NEMO and make it a more diverse, powerful and useful software platform for the community. Furthermore, the CNST thanks all developers who contribute to NEMO. Your contributions make NEMO a better tool for everyone.

CHAPTER 1

Introduction

This manual provides an overview of NEMO and detailed information on each webpage and describes how to configure NEMO to add or remove content to suit the end user's needs. The manual is organized to progress through NEMOs web pages in the order presented to a user accessing the website through the navigation bar and landing page.

The manual starts with a description of how NEMO works, then progresses through logging into the website, the site navigation bar and landing page, then details each user accessible page, then each staff accessible page, and finally each site administrator page. Most of the pages are accessible through the navigation bar however, to keep NEMO highly customizable, some pages must be added through the landing page if desired.

Every page description provides details of the pages direct access web address, how the page is used, how to configure optional features, any differences between the desktop view and mobile device view, and any customizations. To minimize the need for direct code changes, many of NEMOs features automatically hide if they have not been configured.

1.1 Terms Of Use

1.2 Disclaimer

This manual identifies certain commercial equipment, instruments, and materials to specify the experimental procedure. Such identification does not imply recommendation or endorsement by the National Institute of Standards and Technology, nor does it imply that the equipment, instruments, and materials identified are necessarily the best available for the purpose.

CHAPTER 2

How NEMO works

To better understand the features presented in this manual, an overview of NEMO and the key relationships and terms used throughout the manual will be provided.

2.1 NEMO Infrastructure

NEMO is a scalable web application whose features can be run as a distributed application across multiple servers and devices or condensed to run on a single server without additional features. The NEMO components shown below detail the required and optional network connected parts of NEMO (Figure 2.1). A basic implementation of NEMO can be run with a web server, database, and user authentication as a single standalone server.

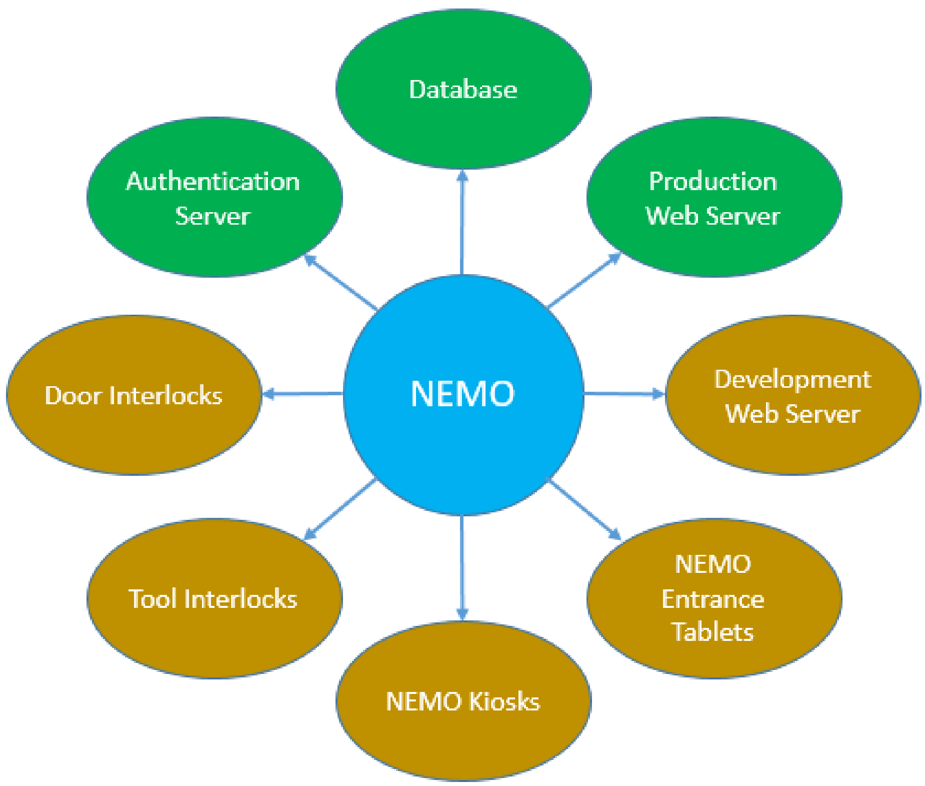


Figure 2.1: *NEMO topographical map*

- Production web server – (required) runs NEMO code.
- Database – (required) stores NEMO data.

- Authentication server – (required) authenticates users allowed to access NEMO.
- Development web server – (optional) write and test custom code changes without impacting the production environment.
- NEMO entrance tablets – (optional) use NEMO to control access to labs in conjunction with door interlocks.
- NEMO kiosks – (optional) allow users quick access to NEMO via badge reader to enable/disable tools and make reservations.
- Tool interlocks – (optional) physically disable tools to prevent unauthorized access. This is typically disabling a keyboard and mouse, monitor, or tool interlock via relay control.
- Door interlocks – (optional) use NEMO to trigger door strikes on access-controlled doors via relay control.

2.2 User model

The user model begins with an account. Accounts are the highest level grouping and can be thought of in terms of who the bill is sent to. An account could be a business using the lab, a school in a university, or some other operational unit. Accounts are discussed in the accounts and projects chapter 22.

Each account will have one or more projects. Projects allow the account to distinguish what department, group, or project leader is using the account. All activity in NEMO is charged to a project. Projects are discussed in the accounts and projects chapter 22.

Each project will have one or more users. Users can be associated with multiple projects and even projects from different accounts (Figure 2.2). Users are discussed in the users chapter 39.

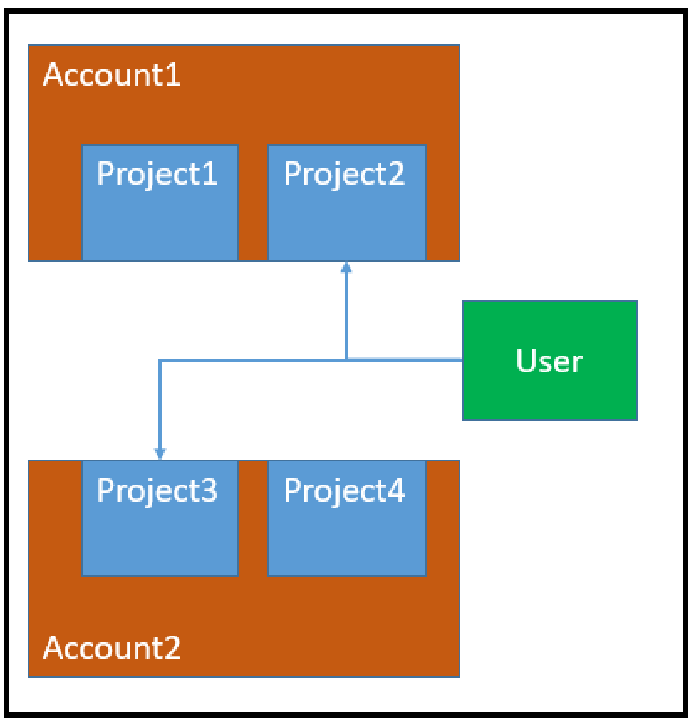


Figure 2.2: *User model*

2.3 User roles

NEMO has six types of distinct users to limit access to only the pages needed by the user. User roles can be set in the users table of the database, discussed in the Detailed administration $\rightarrow$ Users section 43.71.

- The first role is “user” which has basic access to a predefined set of features and functions that allow a user to do work in the facility. This is your regular facility user.
- The second role is “staff” which has all of the basic access of a “user” but can override certain rules that restrict a user as well as an additional set of features specific to staff working in the facility, including using a tool on behalf of a user, access to the maintenance and configuration agenda pages, withdraw consumables etc. . This is for facility/technical staff.
- The third role is “user office” which has all of the basic access of a “user” but can also manage user’s information, accounts, projects, and see billing, withdraw consumables etc. This is for staff managing user accounts and projects.
- The fourth role is “accounting officer” which has all of the basic access of a “user” but can also manage accounts, projects, and billing information.
- The fifth role is “facility manager” which has all of the basic access of a “user” but can also check abuse, manage staff status and absences in the status dashboard, users, and billing information. They also receive and approve/deny access and adjustment requests.
- The sixth level is “administrator” which has all of the access of every other role (with the exception of approving/denying requests), along with admin access to configuration and database administration. NEMO must have at least one user with “administrator” role that can setup customizations and configure the website.

The following is a (non-exhaustive) list of features and permissions for each user role (Table 2.1).

Feature\Role	User	Staff	User Office	Accounting	Manager	Admin
Make reservations	✓	✓	✓	✓	✓	✓
Control qualified tools	✓	✓	✓	✓	✓	✓
Request temporary access	✓	✓	✓	✓	✓	✓
Create buddy request	✓	✓	✓	✓	✓	✓
Check status dashboard	✓	✓	✓	✓	✓	✓
Check sensor data	✓	✓	✓	✓	✓	✓
Detailed admin (with specific model permission)	✓	✓	✓	✓	✓	✓
Email broadcast		✓	✓	✓	✓	✓
User information (view)		✓	✓	✓	✓	✓
Publish news		✓	✓	✓	✓	✓
Create alerts		✓	✓			✓
Manage area access		✓	✓			✓
Supplies		✓	✓			✓
Record training		✓				✓
Configuration agenda		✓				✓
Check/update maintenance		✓				✓
Qualifications		✓				✓
Start staff charges		✓				✓
Manage resources		✓				✓
Check user/project billing			✓	✓	✓	✓
Create accounts			✓	✓	✓	✓
Create projects			✓	✓	✓	✓
User information (edit)			✓		✓	✓
Recurring charges			✓		✓	✓
Abuse					✓	✓

Manage staff absences					✔	
Approve temporary access					✔	
Receive all task updates					✔	
Access API						✔
Access customization						✔
Impersonate other users						✔

Table 2.1: *User roles*

2.4 Tool model

Tools are the things a user will use, and that the lab is interested in keeping track of. There are many features associated with tools and most are optional (Figure 2.3). Tools are defined in the tool table of the database discussed in the Detailed administration → Tools section 43.64.

Figure 2.3: *Tool model*

- Training – users must be qualified to use a tool. Training and tool qualification is discussed in the training chapter 37.
- Reservations – qualified users can make reservations for tools with cus-

tomizable rules to limit reservation abuse. Reservations are discussed in the Calendar $\rightarrow$ Reservations section 5.4. Reservation rules are defined for each tool in the tool table of the database discussed in the Detailed administration $\rightarrow$ Tools section 43.64.

- Tasks – allow users to report problems with tools and documents repairs. Tasks are discussed in the tool control chapter 6.
- Resources – (optional) allows a tool to depend on common facilities which allows shutting down multiple tools by disabling a resource. Resources are discussed in the resource chapter 33.
- Configuration – (optional) allows users to select the required configuration of a tool at reservation time and communicates the configuration request to staff. Configurations are discussed in the Configuration Agenda chapter 26.
- Consumable – (optional) allows lab to charge users for consumables used during a process through questions after usage. Consumables are discussed in the supplies chapter 35.
- Area – (optional) allows limiting tool use unless user is currently logged into a specific area. Areas are configured in the areas table of the database discussed in the Detailed administration $\rightarrow$ Areas section 43.8.
- Interlock – (optional) allows physical disabling of tool when not logged into by a qualified user. Interlocks are configured in the interlocks table of the database discussed in the Detailed administration $\rightarrow$ Interlocks section 43.26.

2.5 Area model (optional)

Areas can optionally be defined in NEMO to group tools in common places. An area can optionally have doors associated with it and permission for the door can be given to users as physical access levels to control when they can access an area (Figure 2.4). Areas can optionally be configured to restrict access to doors and tools unless the user has a current area reservation. Areas are configured in the areas table of the database discussed in the Detailed administration → Areas section 43.8.

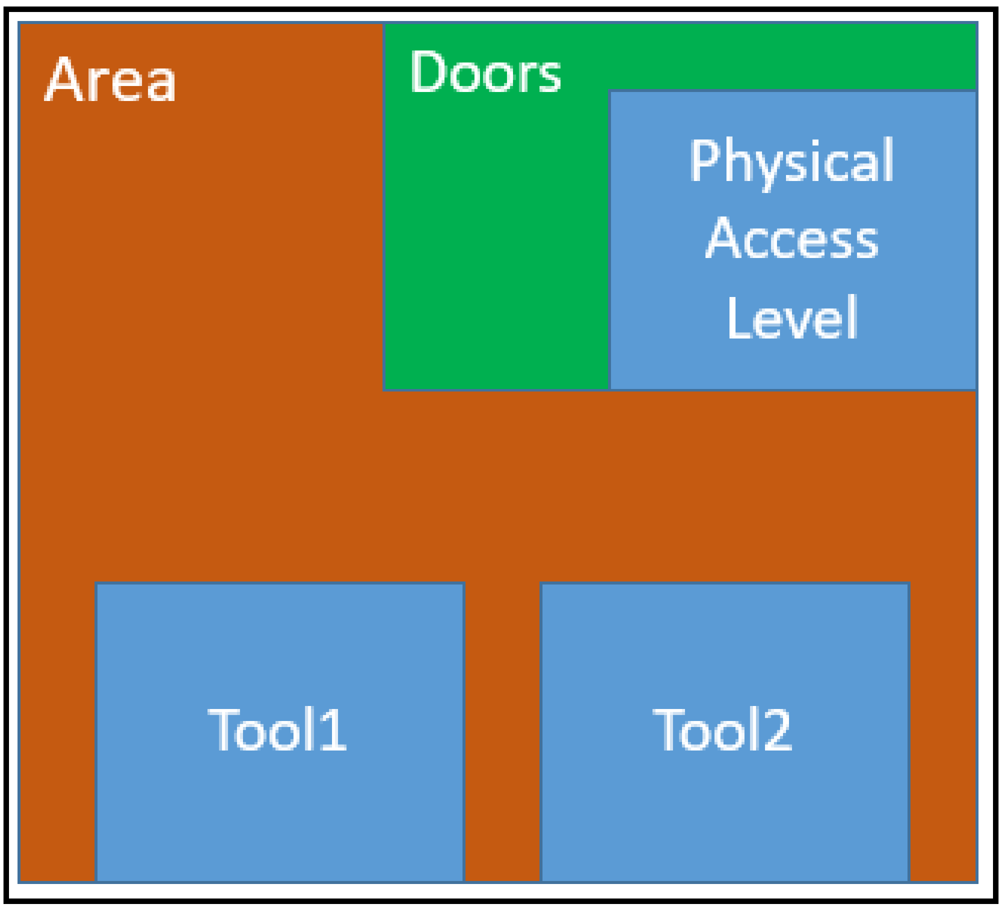


Figure 2.4: *Area model*

2.6 Supply model (optional)

NEMO has the ability to track supplies and their distribution to users. In addition, the supply model is used to track consumables used during tool runs (Figure 2.5). Consumables and supplies are discussed in the supplies chapter 35.

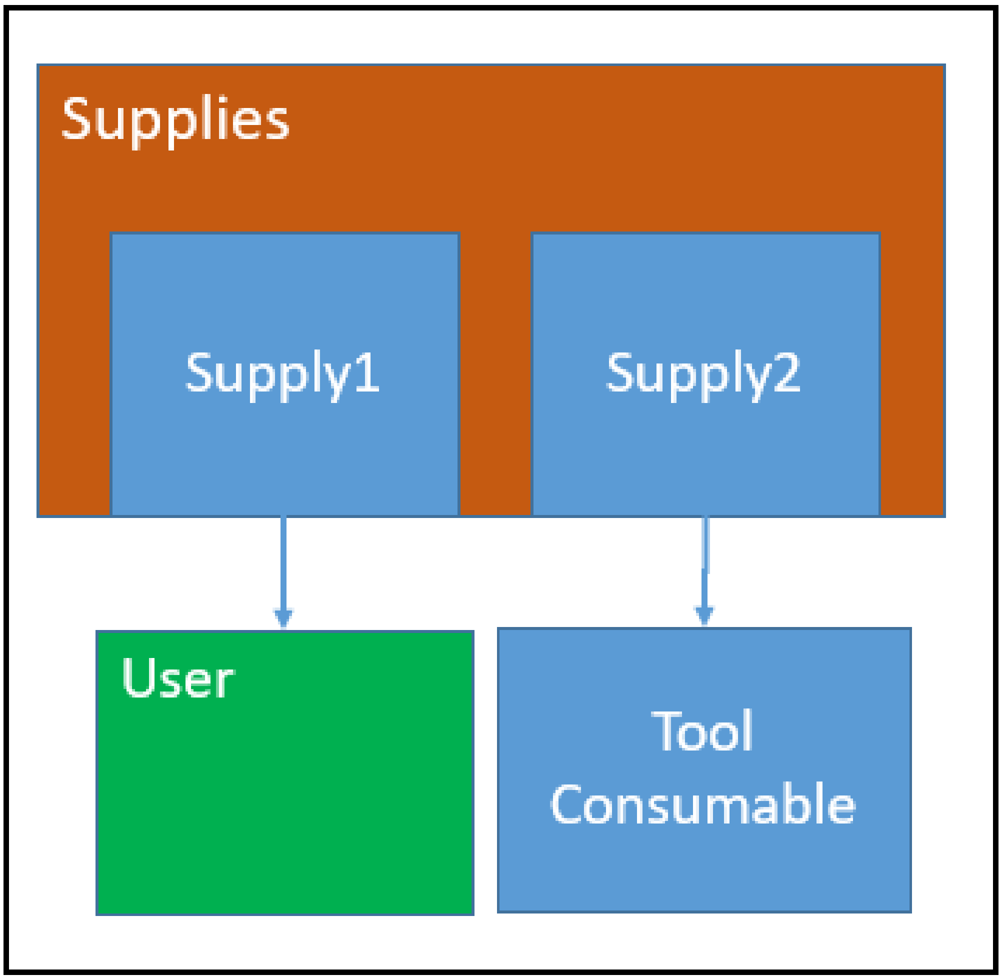


Figure 2.5: *Supply model*

2.7 Billing model

NEMO tracks 6 types of billing by default. The data is accessible directly from the database tables or through the API interface. The database tables are discussed in the Detailed administration chapter 43. The API is discussed in the API access chapter 51.

- Tool usage – Tool usage is tracked in the usage events table of the database.
- Area access – Area access is tracked in the area access records table of the database.
- Consumables – Consumables, both supplies sold to users and supplies consumed during tool runs are tracked in the consumable withdraws table of the database.
- Staff charges – Staff charges, where a staff member performs work on behalf of a user, are tracked in the staff charges table of the database.
- Missed reservations – Missed reservation, where a user fails to show up for a reservation before a grace period expires, are tracked in the reservations table of the database.
- Training sessions – Training sessions are tracked in the training sessions table of the database.

2.8 Controlling NEMO

NEMO is a web application is written in the Python programming language and uses the Django web framework. All NEMO functionality is available using any common web browser by logging into the website to perform any needed actions. In addition, NEMO provides two dedicated interfaces to access NEMO controlled doors (Entrance tablet) and to provide a quick interface to access and reserve tools (Kiosk). The entrance tablet feature is discussed in the entrance tablet chapter 53. The kiosk features are discussed in the kiosk chapter 52.

CHAPTER 3

NEMO user authentication

The first step to accessing the NEMO website is the authentication log in. A successful log in requires authentication against the institutions' account system and an active user name in NEMO. NEMO user creation and user status is discussed in the Users chapter 39.

3.1 Web address

The login page is accessible at site-address/login. The logout page is accessible at site-address/logout.

3.2 Usage

3.2.1 LDAP authentication

If LDAP is used for authentication, the log in page (Figure 3.1) is displayed. Enter a valid user name and password, then click ‘Log in’.

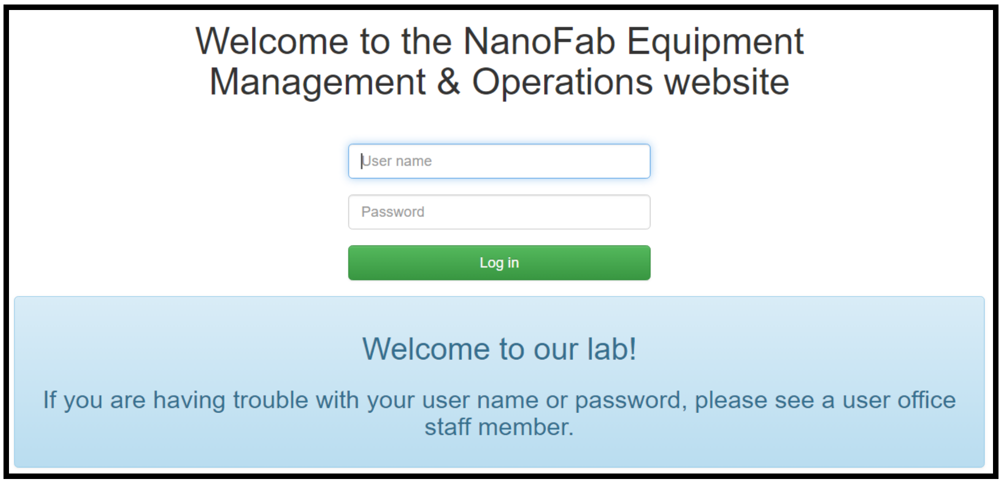


Figure 3.1: *NEMO LDAP Login Page*

Upon successful log in, the user will be redirected to the landing page in section 4.5.

If invalid user credentials are entered, the user will be prompted in red with, “The user name or password was not valid” (Figure 3.2). In this case, enter a valid user name and password to continue.

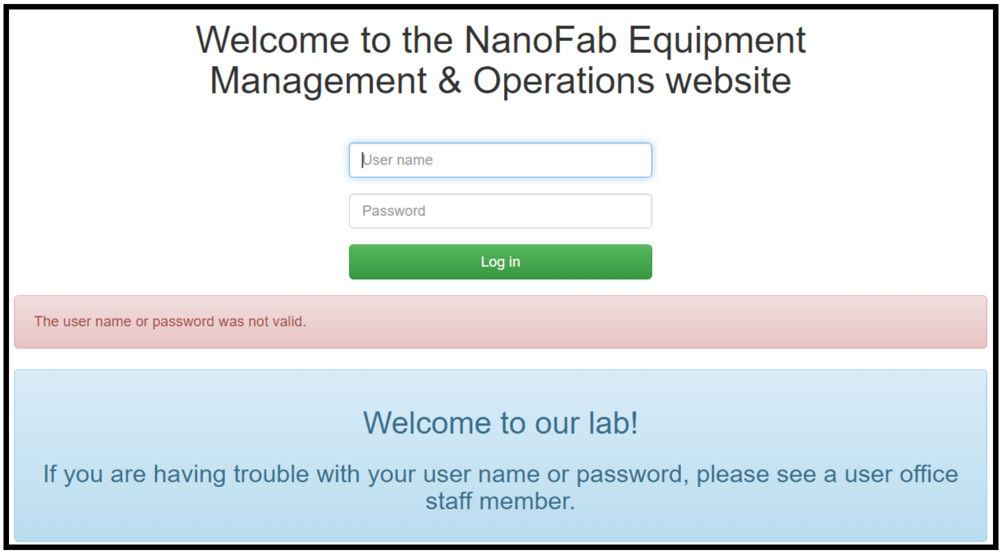


Figure 3.2: *NEMO LDAP Authentication Failed*

3.2.2 Remote user authentication

If a remote user authentication such as Kerberos is used, authentication is handled behind the scenes and users will not be prompted for a username and password.

Upon successful log in, the user will be redirected to the landing page in section 4.5.

If the user does not have an active NEMO account, they will be denied access to NEMO (Figure 3.3). This message is customizable and is described in the Customization → NanoFab failed login section 41.5.3.

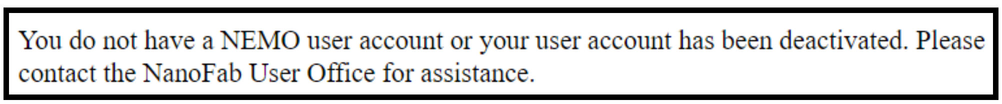

You do not have a NEMO user account or your user account has been deactivated. Please contact the NanoFab User Office for assistance.

Figure 3.3: *Remote User Authentication Failure Message*

3.3 Mobile device authentication

There are no special user authentication views for mobile devices. The authentication procedures above should be followed.

3.4 Authentication customizations

3.4.1 Authentication

Authentication is configured to set LDAP or Remote User log in via the settings.py file described in the Configuring NEMO settings → Authentication Backends section 54.1.1.

3.4.2 Customizable Login Banner

The log in page has a customizable html banner as shown above in blue. If a banner file has not been loaded, nothing will be shown. Customization of the login banner is described in the Customization → Login banner subsection 41.5.2.

3.4.3 Remote User Authorization Failure Message

If NEMO uses remote user authentication and a user is denied access to NEMO because they do not have an active user name, a failure message is displayed. This message is customizable and is described in the Customization → NanoFab failed login subsection 41.5.3.

CHAPTER 4

Navigation Bar

The navigation bar is available at the top of every NEMO user page. Users that are designated as staff have visibility to more features than non-staff users. The distinction between staff and non-staff is set in the Detailed administration → Users dialog section 43.26.

4.1 User Navigation Bar

The default navigation bar (Figure 4.1) provides users with useful information and quick links to the most common NEMO features.

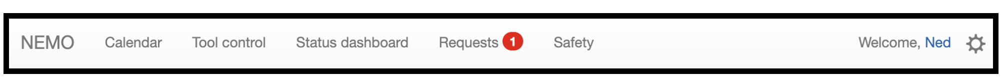


Figure 4.1: *Navigation bar with default features*

NEMO – Link to NEMO landing page section 4.5.

Calendar – Link to calendar page chapter 5.

Tool Control – Link to tool control page chapter 6.

Status dashboard – Link to status dashboard page 7.

Requests – This link is optional and is only visible if configured. Link to requests page chapter 8.

Safety – Link to safety page chapter 10.

Welcome – Identifies the user currently logged into NEMO. This can help reduce confusion in labs where users share computers to access NEMO. If the user profile view is enabled in Customization $\rightarrow$ Users section 41.16.1, by clicking on their name, user will be redirected to their profile (see chapter 18)

Preferences  – Link to user preference page chapter 19.

Logout – Clicking this link will log the current user out of NEMO and return to the login page. The logout link will only be displayed if LDAP authentication is used, and the button is enabled (see customizations below).

4.2 Staff Navigation Bar

The navigation bar for staff (Figure 4.2) includes the same information for users and adds the Administration menu and an indicator if a staff member is charging time to a user.

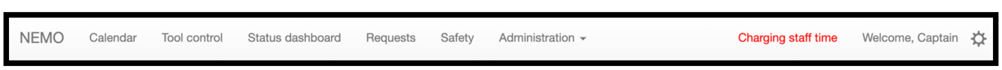


Figure 4.2: *Navigation bar with additional staff features*

Administration – Drop down link list to the NEMO administration features that require staff or super user rights to access (Figure 4.3).

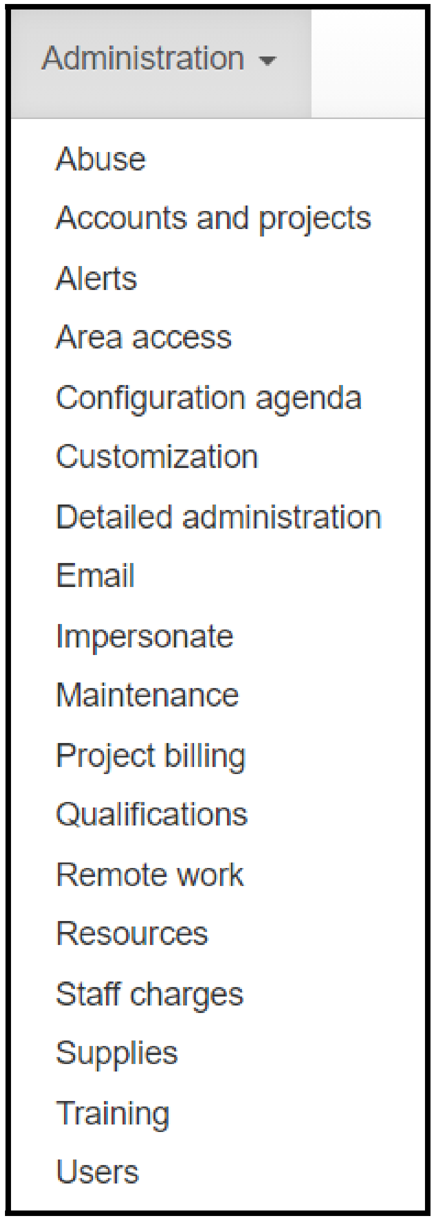


Figure 4.3: *Navigation bar administration menu*

Charging Staff Time – If a staff member is charging staff time to a user, it is noted in red on the navigation bar, so the staff member remains aware of accumulating charges. Hovering over ‘Charging staff time’ will show details of the staff charge including who, what project, and when the charges started (Figure 4.4). Clicking ‘Charging staff time’ will take you to the Staff charges page section 34.

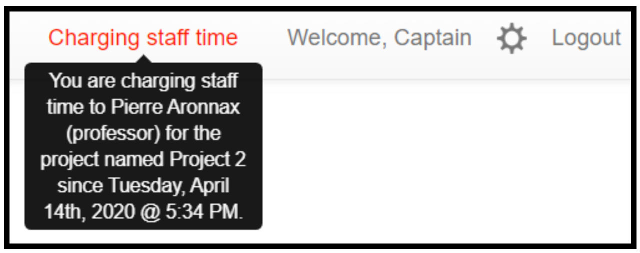


Figure 4.4: *Charging staff time details*

4.3 Mobile device navigation bar

The navigation bar will automatically change to a mobile-type menu icon drop down (Figure 4.5) if the window width is too small to display all information. The links provided for users and staff are maintained. However, there is no indication of charging staff time and the user name is not indicated. In addition, the preferences icon will change to a menu item.

Figure 4.5: *Navigation bar for small windows with menu icon*

Clicking on the menu icon will drop down the menu (Figure 4.6).

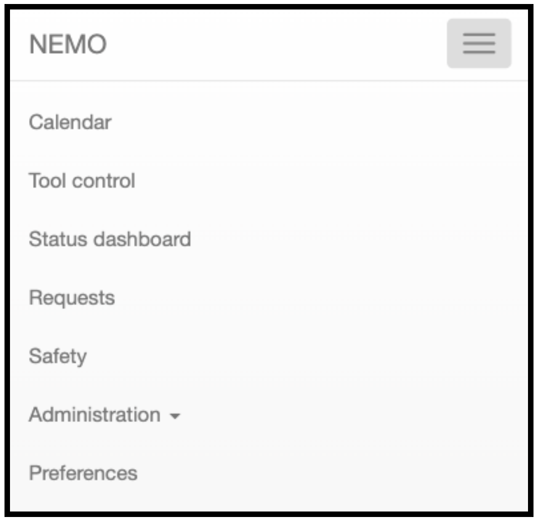


Figure 4.6: *Mobile device drop down menu*

4.4 Navigation bar customizations

4.4.1 Logout button

The logout button is configured to display or hide via the settings.py file described in the Configuring NEMO settings → Templates subsection 54.1.2.

4.5 Landing Page

The landing page (Figure 4.7) is the home page for NEMO. It provides users and staff with important information as well as quick links that are fully configurable by your organization. In addition, first time lab users are prompted to complete a lab rules tutorial to reinforce important policies.

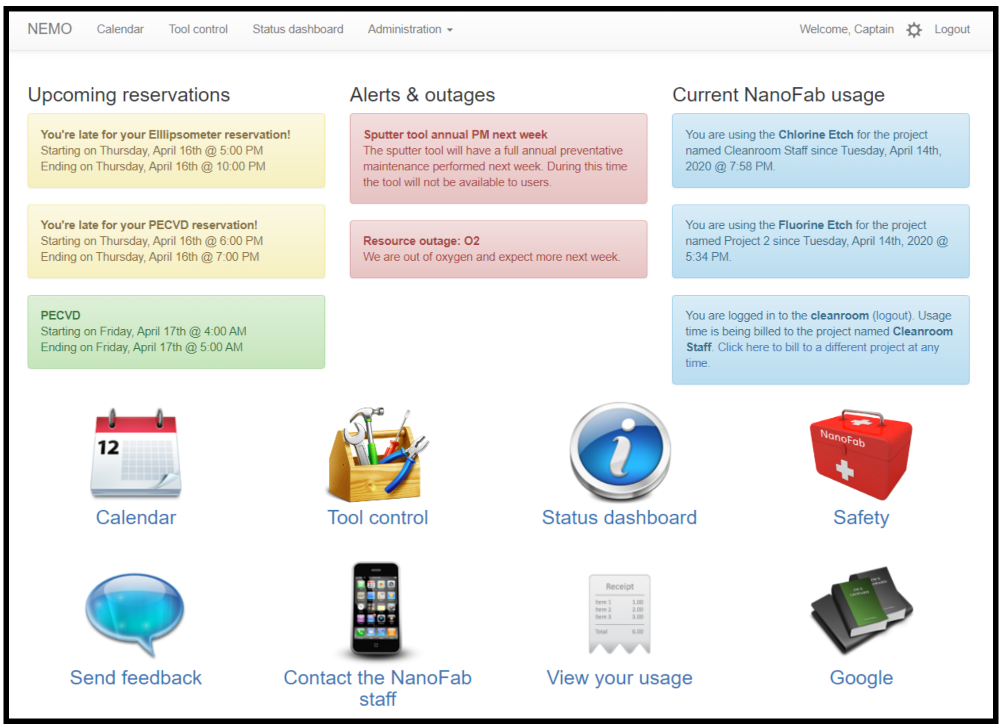


Figure 4.7: *NEMO landing page*

4.6 Web address

The landing page is accessible as the home page of NEMO. For example, www.nemo.com. The page can also be accessed from the navigation bar menu item "NEMO".

4.7 Upcoming reservations

The landing page will list the next three reservations in two background colors, yellow or green. Each reservation box details the tool, start date/time, and end date/time. Details about reservations and how to make them can be found in the Calendar page → Reservations section 5.4.

Clicking on an upcoming reservation will take you to the Tool control page section 6 for the reserved tool.

Yellow – indicates that you are late for your reservation (Figure 4.8). Once you log into a late reservation, it will no longer show up on the list. If you log out before your reserved end time, it may reappear.

Figure 4.8: *Late reservation dialog box*

Green – indicates a future reservation that has not started yet (Figure 4.9).

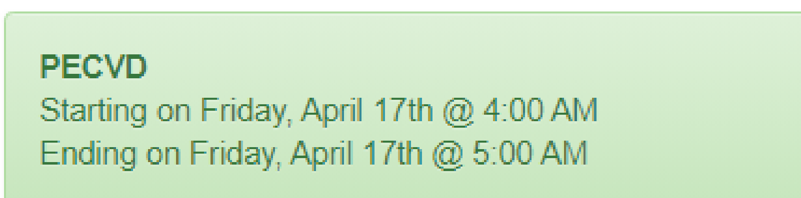


Figure 4.9: *Future reservation dialog box*

4.8 Alerts and outages

On occasion, the lab staff need to communicate important information to users. Alerts and outages (Figure 4.10) are shown in red to indicate their importance. Alerts and outages are configured through the Alerts page chapter 23.

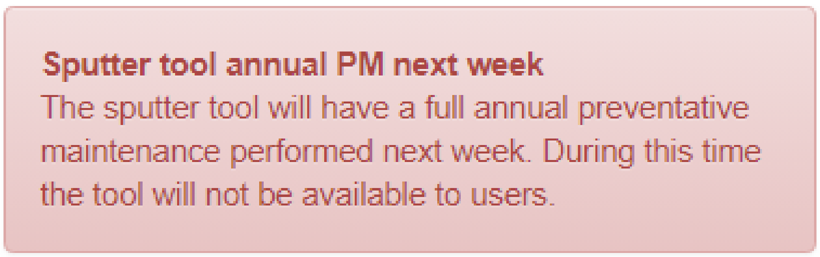


Figure 4.10: *Alert notification dialog box*

Lab resource outages are also indicated in red (Figure 4.11). Resources are fully definable by the organization and associated with tools. Details of the resource feature and how it is used can be found on the Resources page chapter 33.

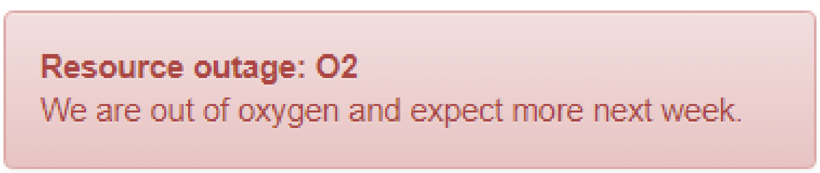


Figure 4.11: *Resource outage notification dialog box*

4.9 Current NanoFab usage

The landing page will list all current tool usage and lab area access in blue background boxes.

4.9.1 Tool Usage

Each tool usage dialog box (Figure 4.12) details the tool and start date/time. Clicking on a tool in use dialog box will take you to the Tool control page of the tool, see chapter 6.

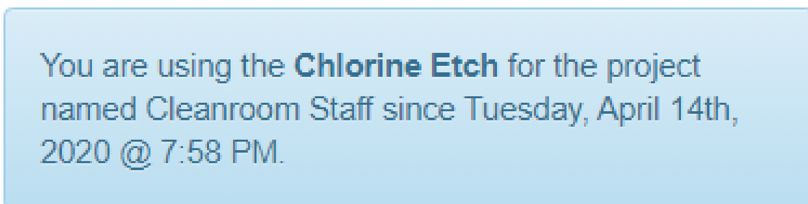


Figure 4.12: *Tool usage dialog box*

4.9.2 Staff Charges

If a staff member is actively charging staff time to a user the details are displayed including the user, project, and start time. Clicking on the staff time dialog box (Figure 4.13) will take you to the Staff charges page, see chapter 34.

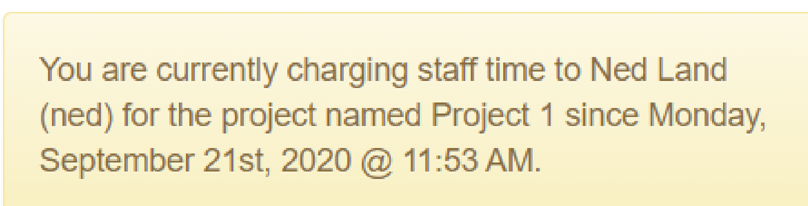


Figure 4.13: *Staff charge dialog box*

4.9.3 Lab area access

The lab area access dialog details which lab you are in and which project your lab time is billed to. Area access history is maintained in the database. Lab areas are configured through the Detailed administration → Areas page in section 43.8.

4.9.3.1 Manual area log in

NEMO can be configured to accommodate manual area log in through the landing page. If manual login is enabled, a green box under Current NanoFab usage provides the interface to log in to an area (Figure 4.14).

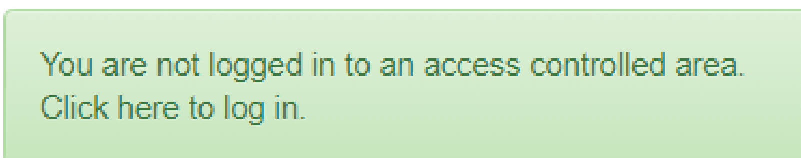


Figure 4.14: *Manual area login dialog box*

Clicking anywhere on the box will take you to the self-log-in dialog (Figure 4.15).

- If you have multiple projects, a radio button list will appear, select a project.
- If you only have one project, your active project will be selected automatically.
- If there are multiple areas, a radio button list will appear, select an area.
- Click Log in to log into the area.

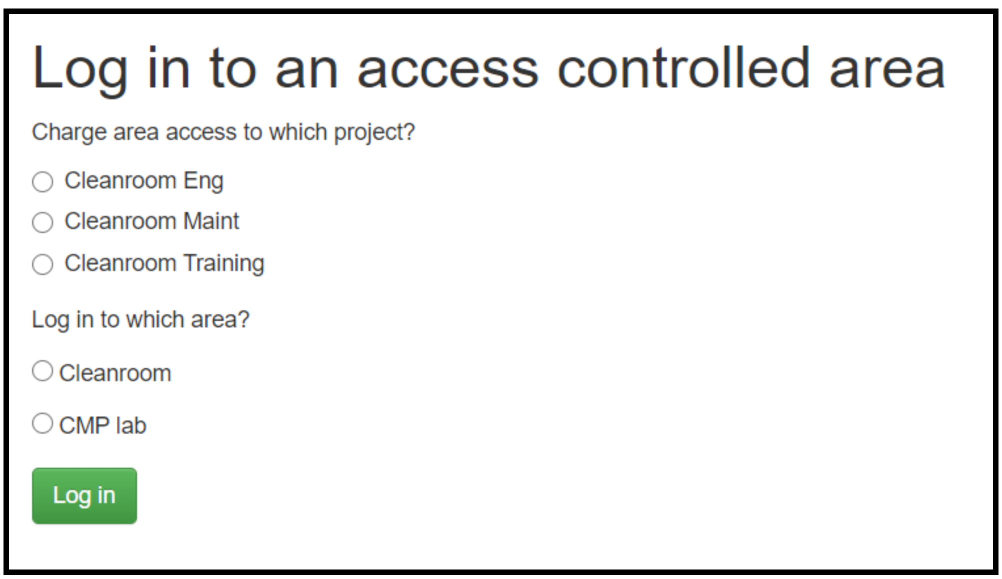


Figure 4.15: *Self log in dialog*

Upon success, the user will be logged in to the selected area using the selected project. There are several reasons a user may be denied log in including expired user accounts, no active projects, area closures, resource outages, and more. Additional details about log in errors can be found in the Entrance tablet $\rightarrow$ Log in errors chapter 53.

4.9.3.2 Changing projects

If you have multiple projects, there will be a link to bill your area access time to a different project (Figure 4.16) than the one you initially selected when logging in.

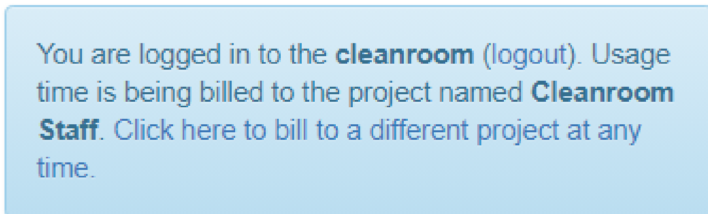


Figure 4.16: *Area usage dialog box*

Clicking the link 'Click here to bill to a different project at any time' will take you to the change project page (Figure 4.17). Click the project name button to change the project. Projects are configured on the Accounts and projects chapter 22.

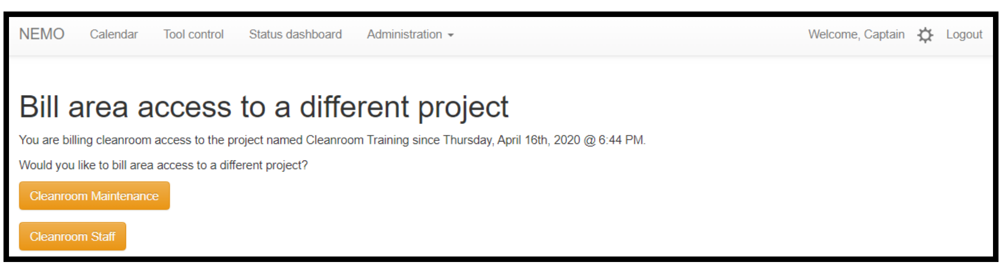


Figure 4.17: *Bill area access to a different project*

4.9.3.3 Manual area log out

NEMO can be configured to accommodate manual area log out through the landing page. If manual area log out is enabled, a logout link will appear next to the area name (Figure 4.18). Click the link to log out of the area (Figure 4.18).

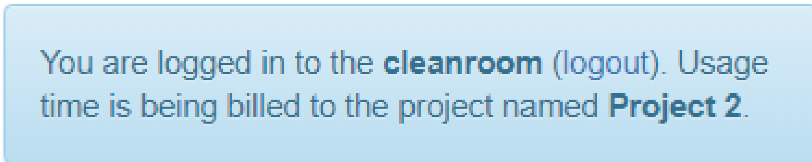


Figure 4.18: *Area manual log out dialog box*

4.10 Configurable Quick Links

The NEMO landing page can be configured with custom icon links (Figure 4.19) that point to commonly used features of NEMO, organizational internal web pages, and external internet pages. Links can be configured with a custom icon, description, how to open, staff only, and desktop or mobile device rendering. Landing page quick links can be configured with a custom icon, description, how to open, staff only, and desktop or mobile device rendering. Setup details can be found under Detailed administration → Landing page choices section 43.27.

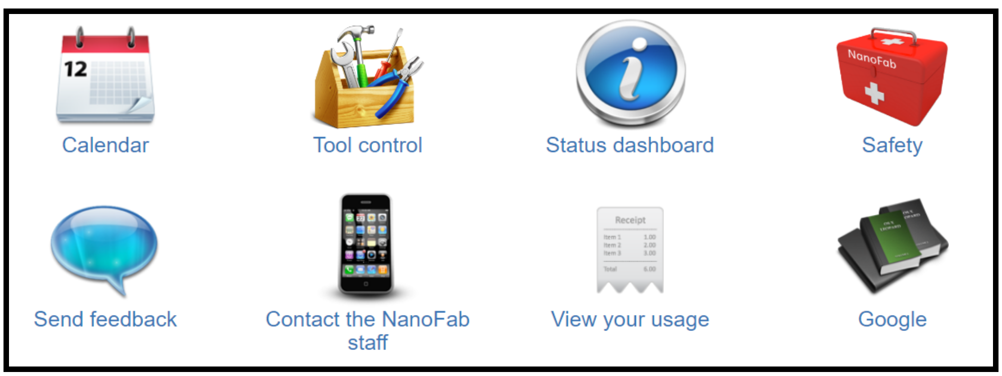


Figure 4.19: *Landing page quick links*

4.11 Facility Tutorial

The facility rules tutorial is an opportunity to provide new users with a tutorial about your lab operating procedures and rules. However, it is an optional and fully configurable tutorial that can be triggered in a user's profile. In addition, it is setup to be self-completing so after a user successfully completes it, the trigger will be unchecked. If triggered, it will not allow any reservations or tool log ins until complete. The trigger is set in the user's profile and by default is set upon user creation. NEMO user profiles are discussed in the Users chapter 19. Details for creating the tutorial, tutorial completion email template, and email address can be found in the customization chapter 41.

Each time a user with the tutorial trigger set logs into NEMO, they will receive a prompt to begin the tutorial (Figure 4.20). Clicking anywhere in the dialog box will start the tutorial. The tutorial page can also be reached at any time regardless of the training required setting. The tutorial page is accessible at site-address/facility_rules_tutorial/. For example, http://www.nemo.com/facility_rules_tutorial/.

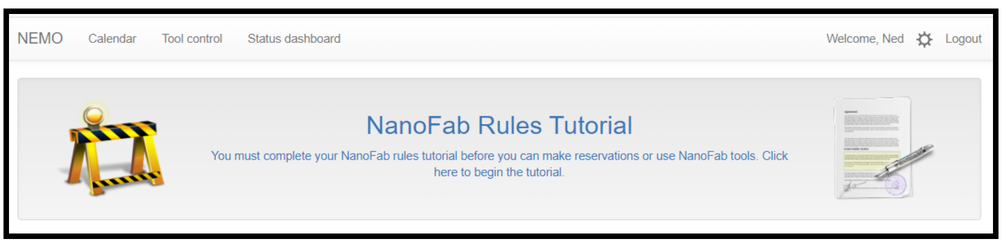


Figure 4.20: *NanoFab rules tutorial dialog box*

If the tutorial has not been configured but a user has been checked, an error message will be returned stating, "The NanoFab rules tutorial has not been customized for your organization yet."

Upon completion of the tutorial, the training required checkbox in the user profile will be cleared and an email will be sent if the abuse email address has been configured and the tutorial summary email template has been configured. The user will be prompted with a completion dialog (Figure 4.21). Click the continue button to return to the landing page.

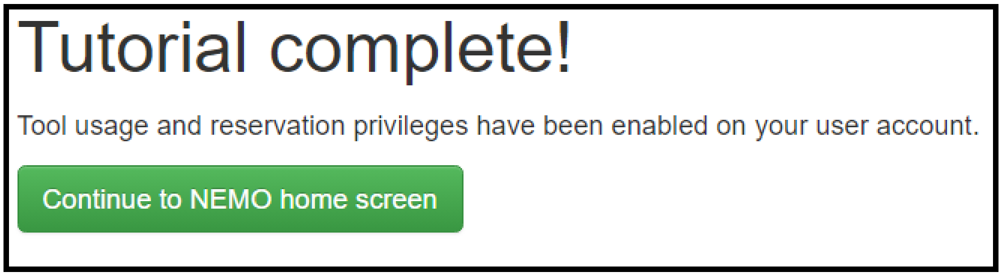


Figure 4.21: *Landing page tutorial complete dialog*

4.12 Mobile device landing page

The landing page will automatically change to a mobile display by stacking information into a single scrollable column (Figure 4.22). Information is prioritized in the order of upcoming reservations, alerts & outages, current NanoFab usage, then quick links. Functionality remains the same. The landing page quick links can be configured to only display on mobile devices or only on desktop computers.

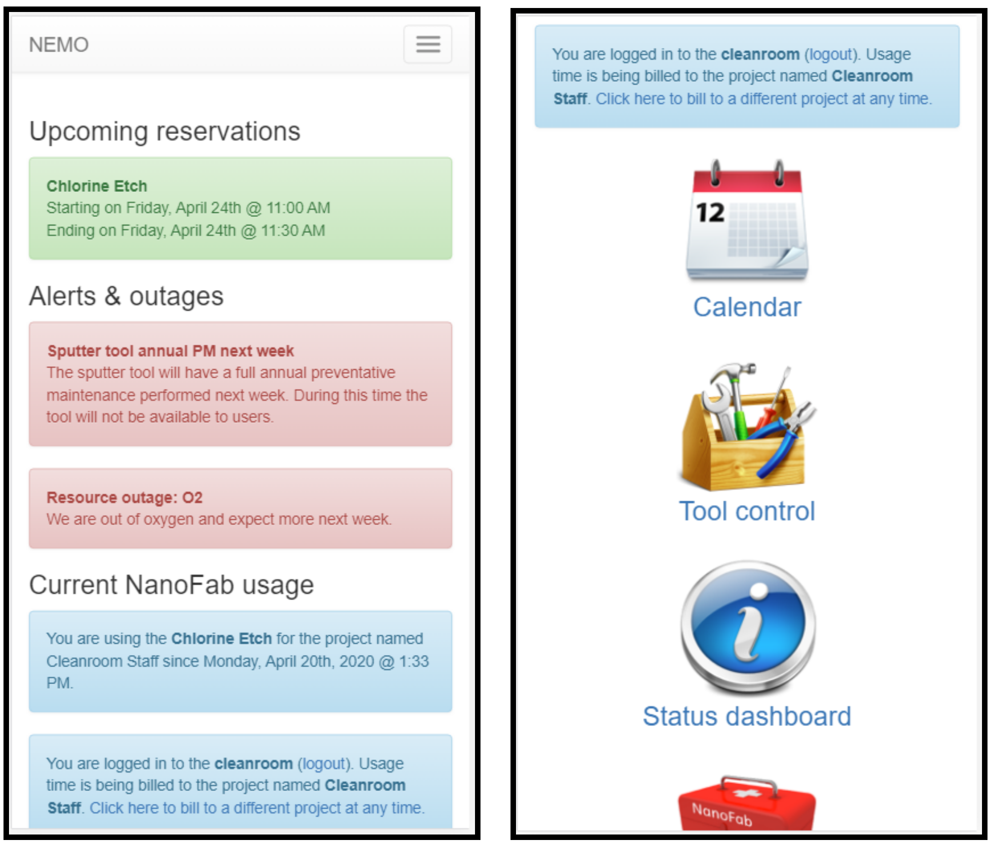


Figure 4.22: *Mobile device view of landing page*

4.13 Landing page customizations

4.13.1 Area manual log in and log out

The landing page can be configured to allow manual area log in and/or manual area log out. Setup details can be found under Customization → Application settings section 41.2.

4.13.2 Configurable quick links

Landing page quick links can be configured with a custom icon, description, how to open, staff only, and desktop or mobile device rendering. Setup details can be found under Detailed administration → Landing page choices section 43.27.

4.13.3 Lab tutorial setup

The lab tutorial is a custom JavaScript enabled html page. Details of how to setup and load the tutorial can be found under Customization → NanoFab rules tutorial section 41.5.5.

CHAPTER 5

Calendar

The calendar page is the main interface for making area and tool reservations, viewing reservation schedules, and reviewing usage. The page features a side bar to quickly navigate between areas and tools and shows each tools status as well as links to review your reservation schedule and actual usage; and the calendar which can be set for day, week, or month resolution to graphically show your reservation and usage information. Several reservation policies are implemented to limit abuse and ensure fair access to all users. The calendar page will automatically refresh every 30 seconds updating the current calendar view and all tool status icons.

5.1 Web address

The calendar page is accessible at site-address/calendar/. The page can also be accessed from the navigation bar menu item “Calendar”.

5.2 Calendar Side bar

The side bar allows the calendar mode and an area or tool to be selected and the personal schedule to be selected (Figure 5.1). If calendar overview options are enabled in the Customization → Calendar settings (see section 41.3), those links will be displayed in the sidebar as well.

Area Notes:

- The area section of the side bar is only visible if an area is configured to require a reservation for access.
- Area categories are optional.
- Area creation and configuration are discussed in the Detailed administration → Areas section 43.8.

Tool Notes:

- The tool section of the side bar is only visible if tool have been configured.
- Tool categories are required.
- Tool creation and configuration are discussed in the Detailed administration → Tools section 43.64.

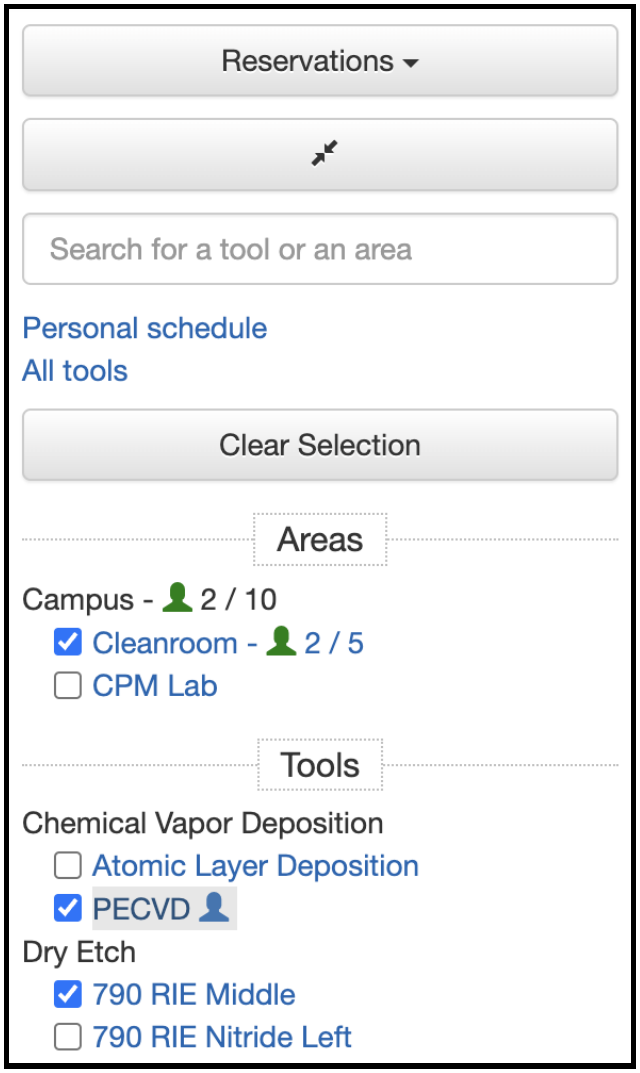


Figure 5.1: *Calendar side bar*

5.2.1 Calendar Mode

The top button on the side bar controls what information the calendar displays, and which calendar functions are available (Figure 5.2). Each mode is detailed in the following sections.

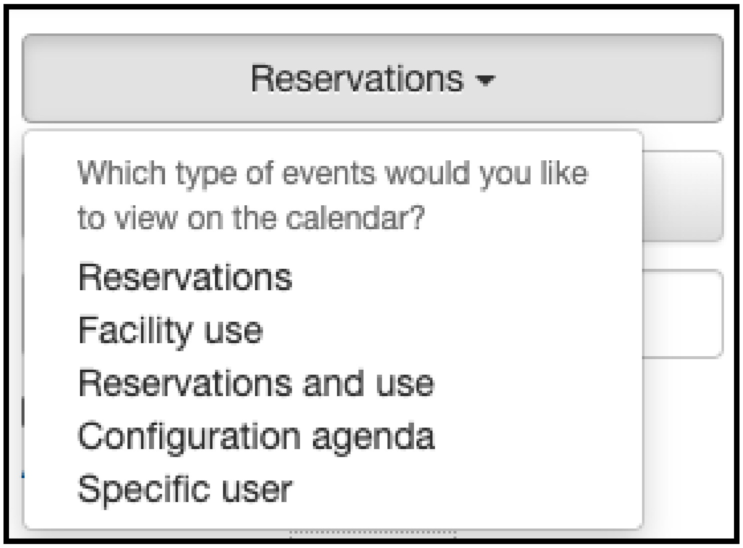


Figure 5.2: *Calendar mode selection*

5.2.2 Find the area or tool of interest

The expand and contract toggle button (Figure 5.3) provide a shortcut to open or close the area and tool list.

Figure 5.3: *Expand and contract toggle button*

Clicking the expand/contract button will fully expand the area and tool list so all categories, sub-categories, areas, and tools are listed (Figure 5.1).

Clicking contract will close the area and tool list so only top categories are listed (Figure 5.4).

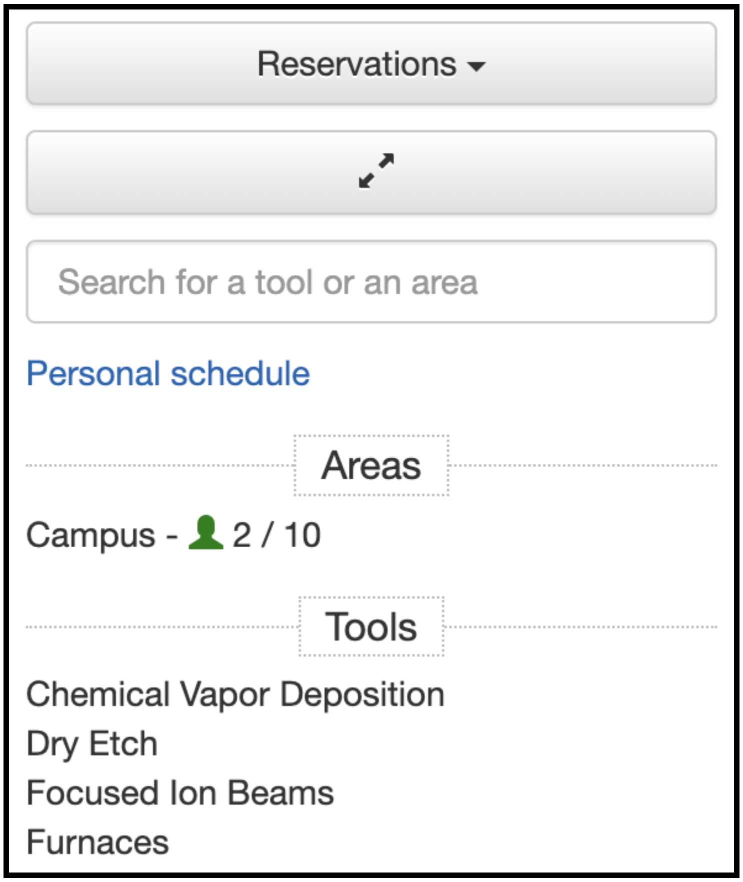


Figure 5.4: *Tool list contracted*

To find an area or tool directly, enter the name in the search dialog (Figure 5.5) then select the name of the list returned. The return list updates automatically as typed, and a tool can be clicked from the list at any time (Figure 5.6). Once clicked, the list is expanded to show the area or tool clicked and that area or tool is selected.

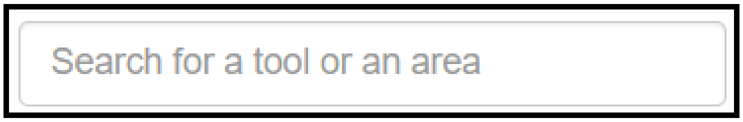


Figure 5.5: *Tool search dialog*

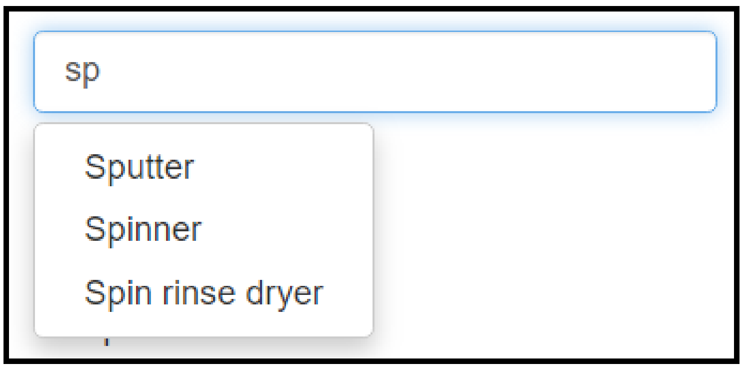


Figure 5.6: *Tool search return list*

5.2.3 Personal schedule

The personal schedule link appears as the first item in the tool list and provides a way to show reservations or usage across all tools for the current user. Note that since a specific tool is not selected while viewing a personal schedule, reservations cannot be made in this mode.

5.2.4 Overview options

Overview options can be enabled in the Customization → Calendar settings section 41.3. Once enabled, you will have the options to see “All tools”, “All areas” and “All tools and areas” and non staff users can have a “Only show qualified tools” extra button depending on the settings you decide to enable. As their name indicates, those options will allow the user to see all tools, areas or both in the calendar. Those links will also work with both the “Reservations” and “Facility usage” event feeds (Figure 5.7).

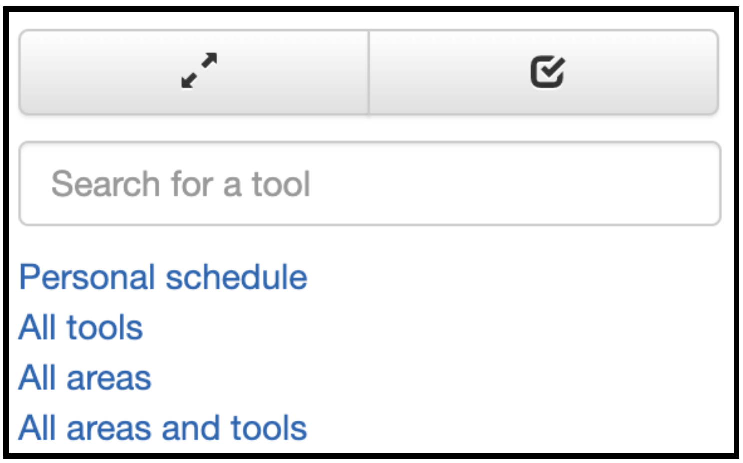


Figure 5.7: *Tool overview options*

5.2.5 Hierarchy of the area and tool list

The area and tool list are displayed in alphabetical order by top level category, then by second level category, etc. If both areas/tools and sub-categories exist at any level, areas/tools are listed first in alphabetical order, then sub-categories are listed in alphabetical order (Figure 5.8). All tools must have at least one top level category. Area categories are optional and set in the area table discussed in the Detailed administration → Areas section 43.8. Tool categories are set in the tool table and are discussed in the Detailed administration → Tools section 43.64.

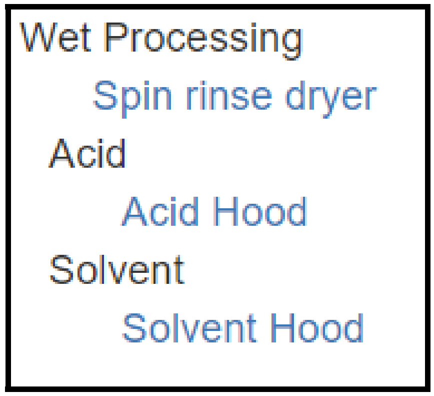


Figure 5.8: *Example of category and tool mixed listing*

5.2.6 Area list icons

Each area lists information to determine the status of the area. A person icon indicates the occupancy status according to color. A fraction follows indicating the number of occupants versus the total number allowed (Figure 5.9).

Figure 5.9: *Example Area with icons*

The occupancy of this area is low and additional users will be allowed into the area. Hovering over the icon shows a list of current users.
The occupancy is close to the limit. Hovering over the icon shows a list of current users.
The occupancy is at or above the limit and users will not be allowed to enter. Hovering over the icon shows a list of current users.

The list of current users is color coded by role. Users in white, staff in green, and service personnel in orange (Figure 5.10).

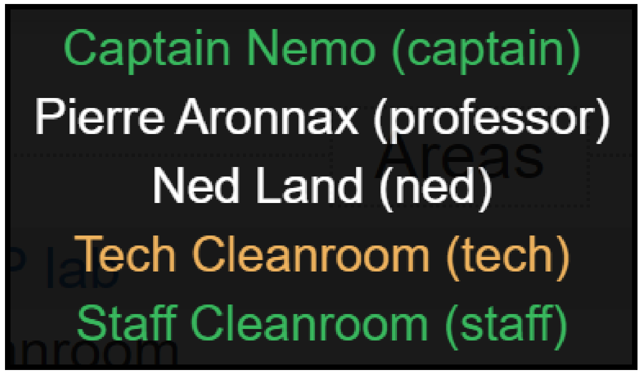


Figure 5.10: *Hover over occupant listing*

3 / 5 Fraction indicating the number of users currently logged in to the area versus the total number of users allowed. Hovering over will display the number of users, staff, and service personnel.

Note: The occupancy limits can be configured to include or exclude staff and service personnel in the total occupant count. In that case, they will be listed separately from the occupant count. The occupancy limit and counting staff and service personnel are set in the area table discussed in the Detailed administration → Areas section 43.8.

5.2.7 Tool list icons

Each tool can list icons to give a quick reference to visually note the operating status. Hovering over an icon will give a description of its purpose in case the icons meaning isn't known.

 The tool requires an area reservation. Before a user can make a reservation on the tool, they must first make an area reservation that will encompass the start time of the tool reservation.

 A user is currently logged into the tool. Hovering over the icon will show the logged in user's name.

 A delayed logoff is in effect. The tool is not available for users.

 A scheduled outage is in effect for this tool. The tool is not available to users.

 A scheduled outage of an option resource is in effect for this tool. The tool is available but may not be fully functional.

 A required resource is unavailable. The tool is not available to users.

 An optional resource is unavailable. The tool is available to users, but the tool may not be fully functional. The optional resource unavailable icon is only displayed if the required resource unavailable icon is not displayed.

 The tool is shut down because of a serious problem. The tool is not available to users.

 The tool has a problem that may impact usage or results. The tool is available to users, but the tool may not be fully functional. The tool problem icon is only displayed if the tool shut down icon is not displayed.

5.2.8 Area and tool qualification

By default, users can not see the areas they are not qualified to access. However, that is configurable in the Customization $\rightarrow$ Calendar settings section 41.3. If enabled, areas that users are not qualified to access will be greyed out in the same manner as tools.

Tools that users are qualified to access will appear dark on the list while tools that a user is not qualified to access will appear greyed out (Figure 5.11). User tool qualifications are detailed in Qualifications chapter 30. Regular users (non-staff) can also be given the option to hide tools they are not qualified on, see Customization $\rightarrow$ Calendar settings section 41.3.

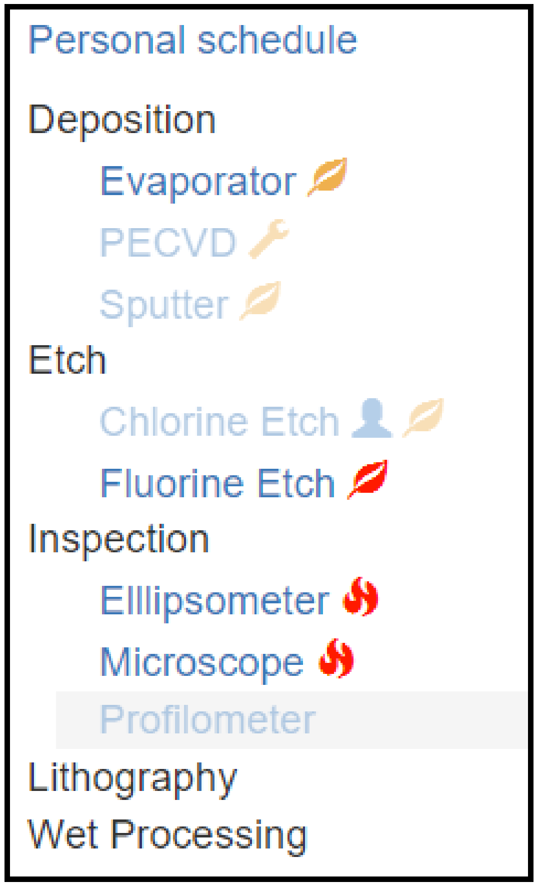


Figure 5.11: *Tool list showing user qualifications*

5.3 Calendar header bar

The default calendar header bar is displayed above the calendar and provides users an interface to navigate dates and switch views (Figure 5.12). By default, the calendar displays a one-week view which can be changed to a one-day view or one-month view. The default view is customizable and detailed in the Customization → Calendar settings page.

Figure 5.12: *Default calendar header*

5.3.1 Arrow buttons

Clicking the left or right arrows will increment or decrement the current view. For example, in the week view, the left arrow will move to the previous week and the right arrow will move to the following week.

5.3.2 Today button

Clicking the “Today” button will change the display to include the current day in the selected view. In any view, when the current day is in the view, the background is highlighted in beige (Figure 5.13).

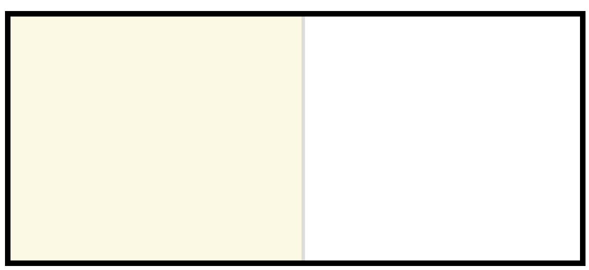


Figure 5.13: *Background for current day (left) and other day (right)*

5.3.3 Login to the area button

Clicking the login to the area button will log the user into the area selected if they have a current reservation. The login to the area button is only visible if area reservations are required, an area is selected, and the allow area login/logout in the calendar view option is set in the Customization $\rightarrow$ Application settings section 41.2.

The log in process follows the same steps outlined in the landing page section 43.27.

There are several reasons a user may be denied log in including expired user accounts, no active projects, area closures, resource outages, and more. Additional details about log in errors can be found in the Entrance tablet → Log in errors section 53.3.

5.3.4 Current day/time indicator

The current day is highlighted in each calendar view. On calendar views with the time displayed (day and week views), the current time can optionally be displayed with a red pointer (Figure 5.14). This option is set in the Customization → Calendar settings section 41.3.

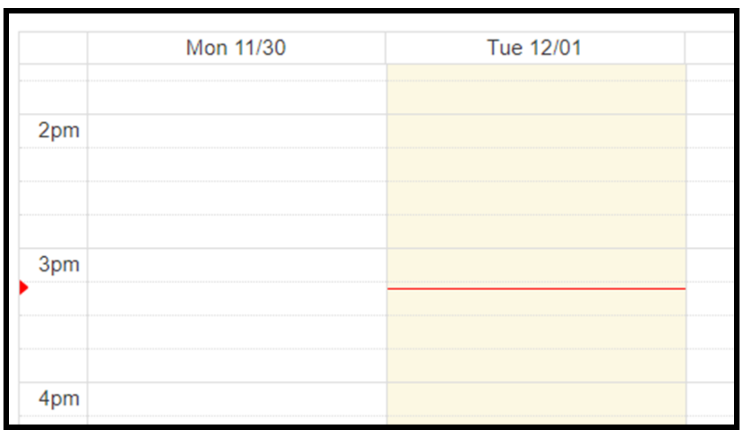


Figure 5.14: *Calendar day and time highlights*

5.3.5 Day view button

Clicking “Day” will show a single day view calendar. The top of the calendar will show the date in the form of ‘day of week mm/dd/yyyy’ (e.g. Monday 04/20/2020) (Figure 5.15). The default date format is customizable and detailed in the Customization → Calendar settings section 41.3.

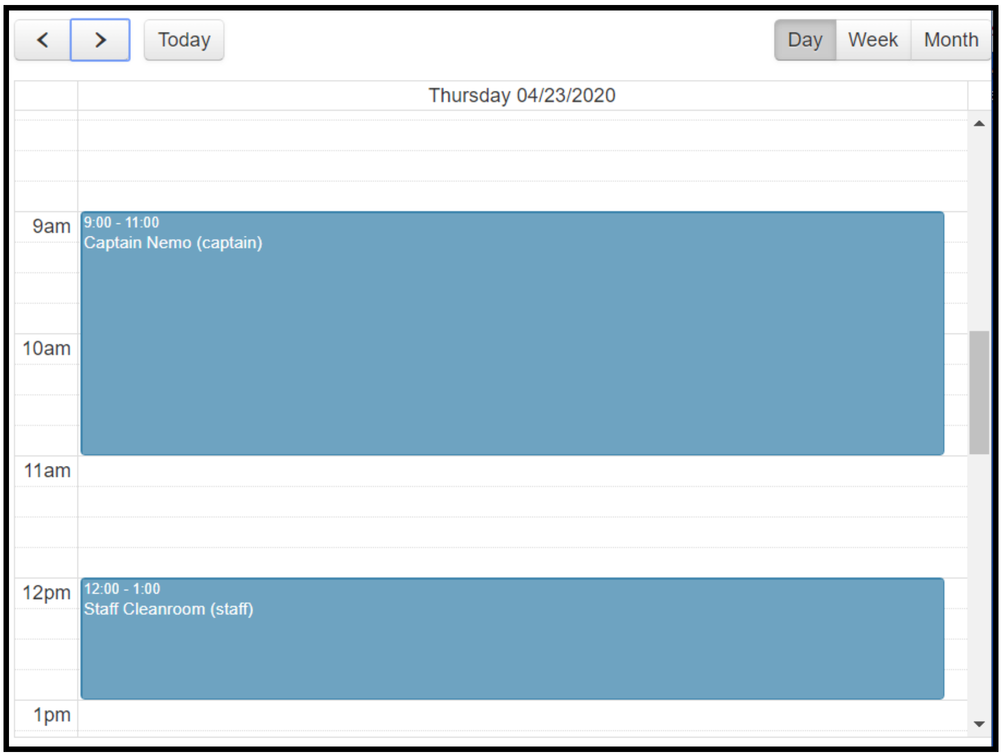


Figure 5.15: *Calendar day view*

5.3.6 Week view button

Clicking "Week" will show a single week view calendar. The date for each day will be displayed at the top of the calendar in the form of 'day of week mm/dd' (e.g. Mon 4/20) (Figure 5.16). The default date format is customizable and detailed in the Customization → Calendar settings section 41.3.

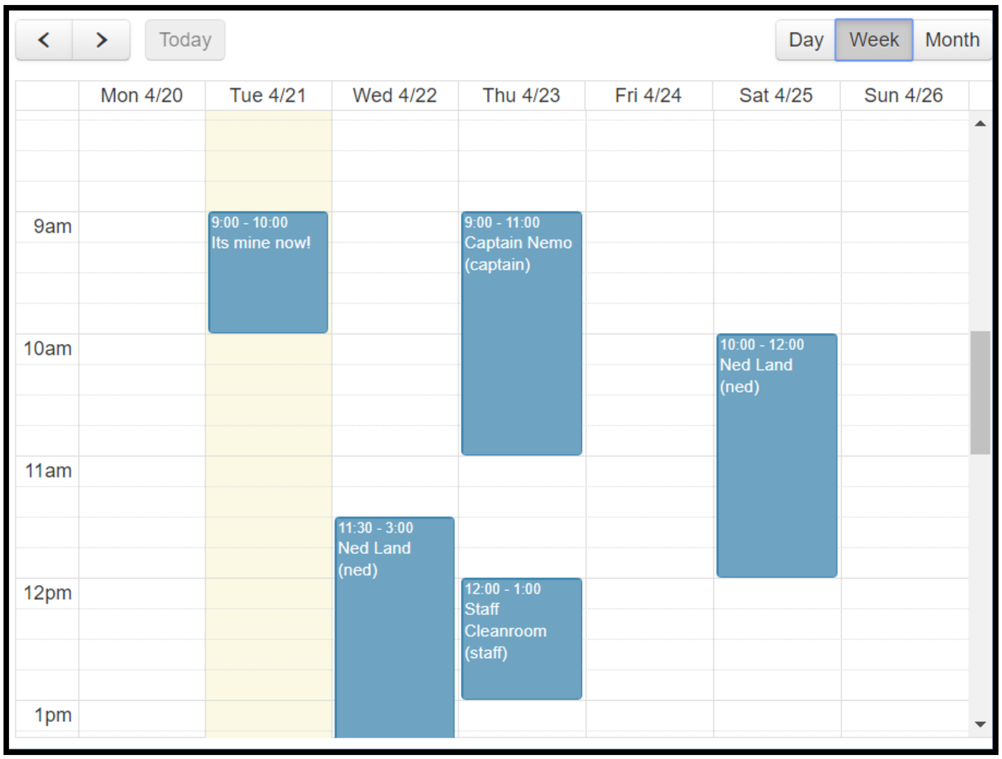


Figure 5.16: *Calendar week view*

5.3.7 Month view button

Clicking "Month" will show a single month view calendar with leading and trailing day from prior and future months. The calendar header will show the month and year, the top of the calendar will show the days of the week, and each day will show the day of the month (Figure 5.17). The default date format is customizable and detailed in the Customization → Calendar settings section 41.3.

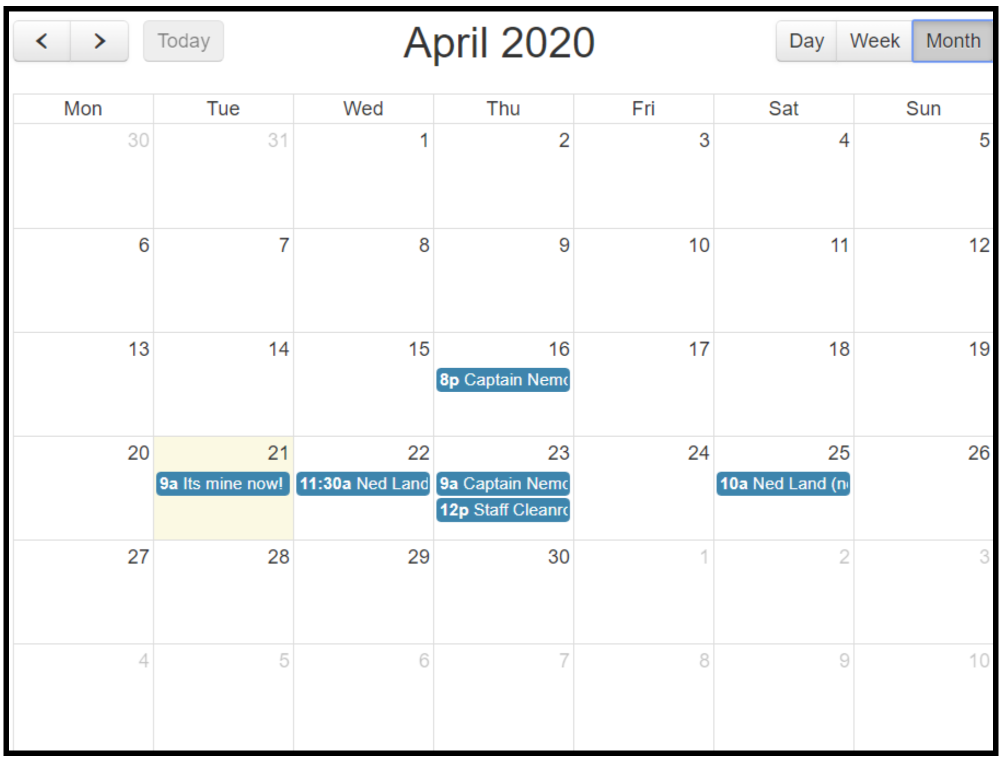


Figure 5.17: *Calendar month view*

5.4 Reservations

Selecting "Reservations" mode from the calendar sidebar will allow placement of area specific and tool specific reservations onto the calendar (Figure 5.18). All reservations are audited through system reservation policies as well as area specific and tool specific reservation policies. The calendar view is used to create a reservation, change a reservation, or view a personal schedule. All tools, all areas or all tools and areas can also be displayed if enabled in in the Customization → Calendar settings section 41.3. A reservation history is maintained in the database including active, canceled, missed, moved, and resized reservations. Reservation records are discussed in the Detailed Administration → Reservations section 43.39.

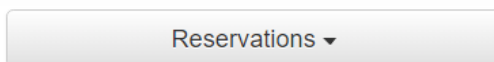


Figure 5.18: *Calendar side bar in Reservations mode*

5.4.1 Staff calendar header bar

In "Reservations" mode, the calendar header bar expands for staff (Figure 5.19) and adds reserving on behalf of someone else and scheduling an outage. The distinction between staff and non-staff is set in the Detailed administration → Users dialog (see section 43.71).

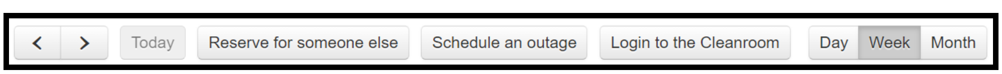


Figure 5.19: *Staff calendar header bar in reservations mode*

5.4.1.1 Reserve for someone else button

The ‘Reserve for someone else’ button starts a staff reservation on behalf of another user.

5.4.1.2 Schedule an outage button

The ‘Schedule an outage’ button starts the scheduling of a one time or recurring shutdown of an area or tool.

5.4.2 Calendar view

Reservations for all users and scheduled outages are viewable for the selected tool in the time window displayed (Figure 5.20). Reservations display in blue and show the start time, end time, and user that reserved the tool. Scheduled outages display in red and show the start time, end time, and outage title. NEMO automatically updates the reservations upon any navigation change for tool selection or time window. A scroll bar will appear on the right side of the calendar view to allow scrolling the time window. Clicking any reservation or scheduled outage will show additional details (Figure 5.21, Figure 5.22).

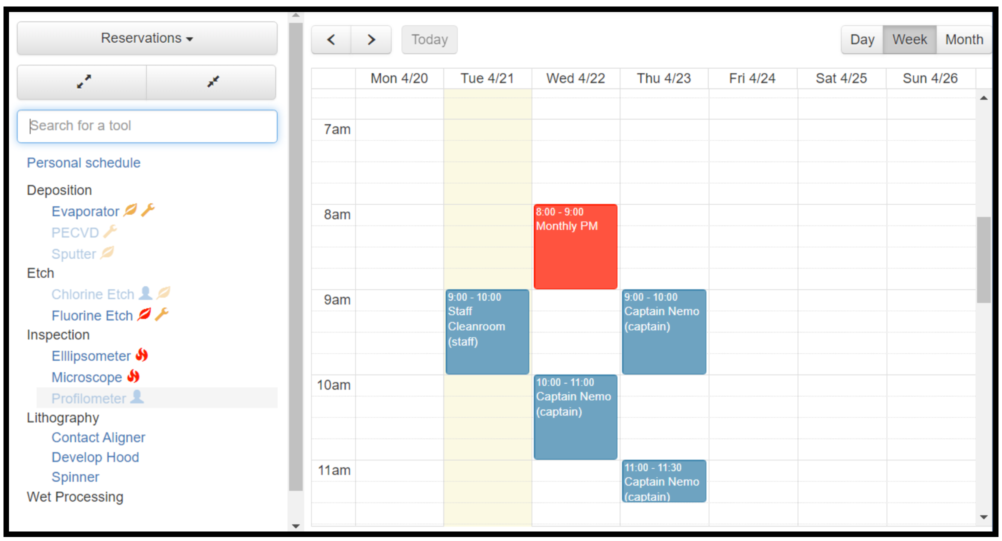


Figure 5.20: *Tool specific calendar view*

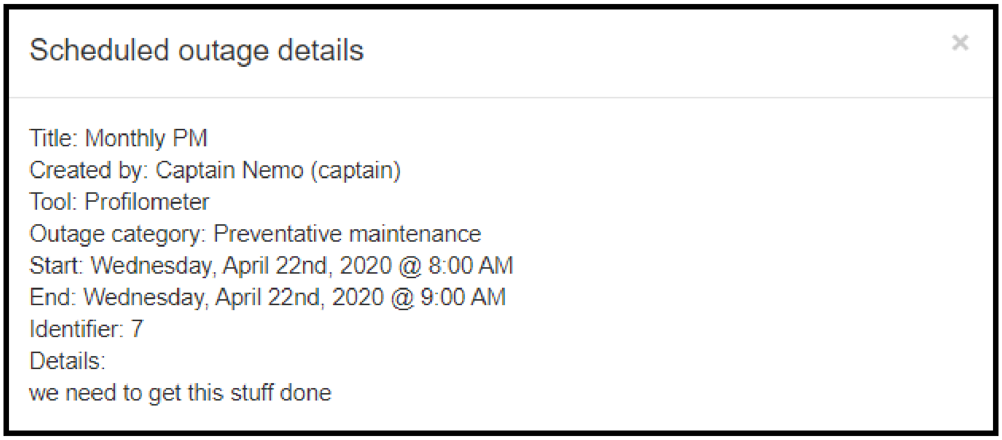


Figure 5.21: *Scheduled outage details dialog*

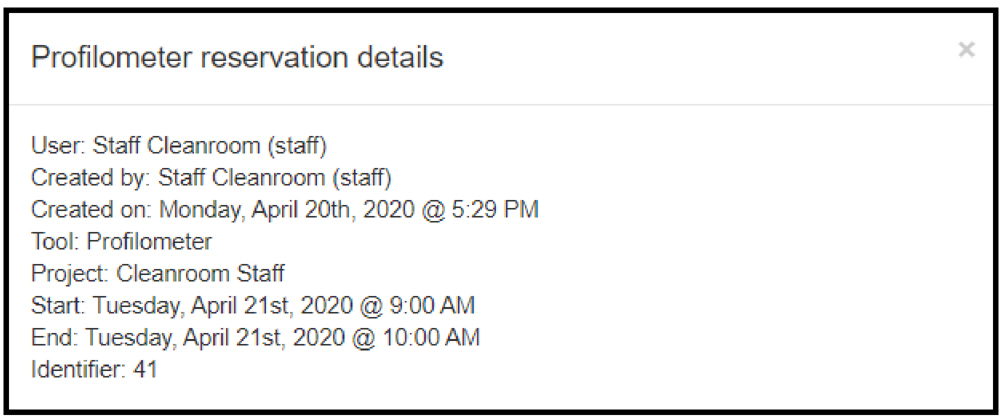


Figure 5.22: *Reservation details dialog*

5.4.3 Personal schedule view

The personal schedule view will display all reserved areas and tools for the user in the current time window. Personal schedule reservations display in green and show start time, end time, and the area or tool name (Figure 5.23). Reservations may be moved or deleted in this view. Clicking any reservation will show additional details (Figure 5.24).

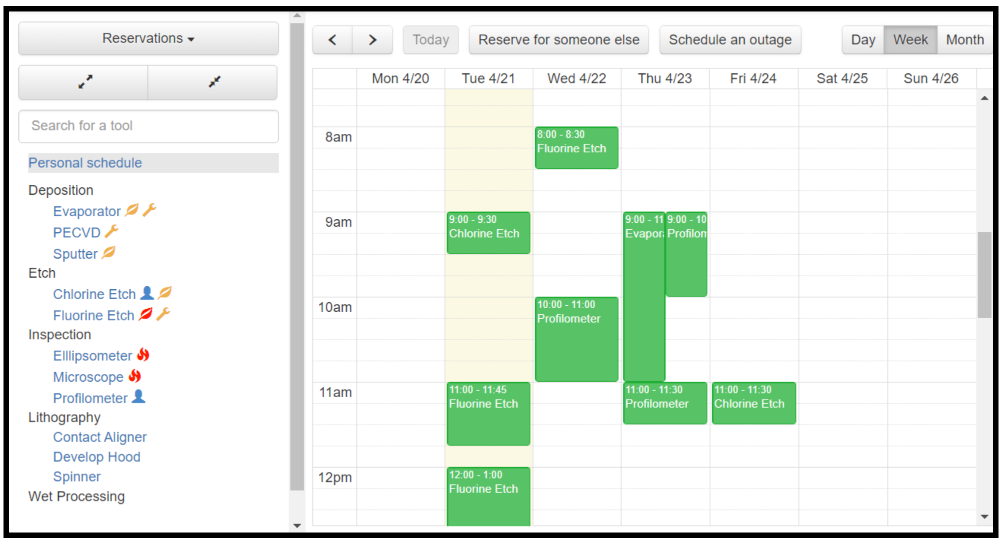


Figure 5.23: *Personal schedule calendar view*

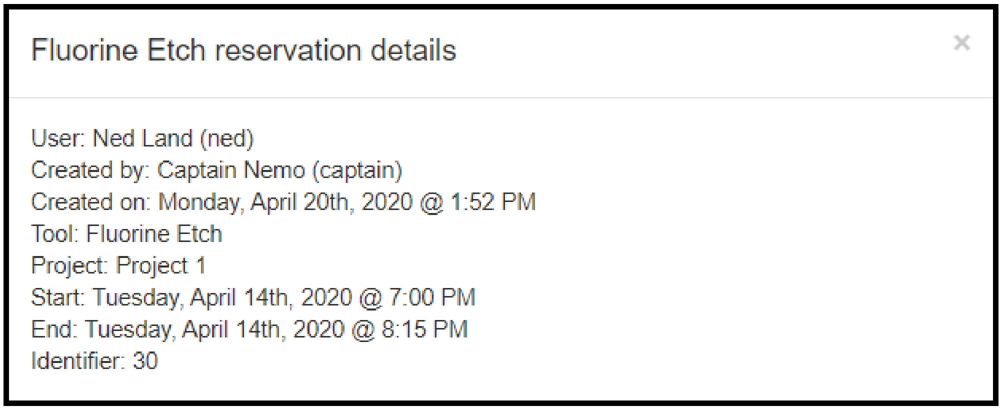


Figure 5.24: *Personal schedule reservation details dialog*

5.4.4 All tools, All areas and All tools and areas calendar views

Similar to the personal schedule, selecting “All tools” will allow the user to see all tool reservations (Figure 5.25). The same goes for “All areas” and “All areas and tools”.

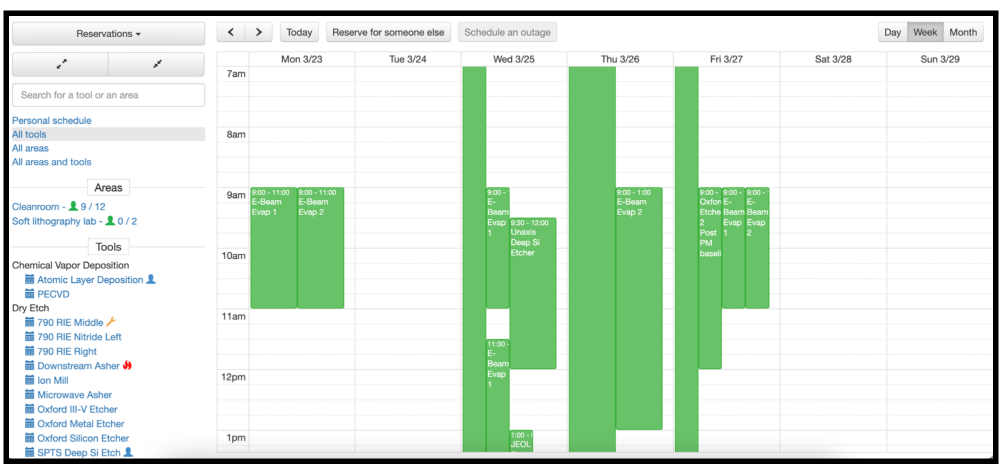


Figure 5.25: *All tools calendar view*

5.4.5 Reservation policy

Reservation policies fall into two categories. There are system reservation policies and area/tool specific reservation policies. The policies are intended to safeguard NEMO, ensure the integrity of the database, and provide a customizable profile to maximize tool availability to users. Staff are able to override many of the policies on behalf of a user to provide scheduling flexibility and promote staff awareness of special tool needs such as excessively long runs that might otherwise go undetected.

5.4.5.1 System reservation policies

The following system reservation policies must be met to allow a reservation to be created or modified. Staff **may not override** any of these policies.

- Reservations may not have a start time that is earlier than the end time.
- The user may not create, move, or resize a reservation to coincide with another reservation.
- The user may not create, move, or resize a reservation to coincide with a scheduled outage.
- Reservations that have been cancelled may not be changed.
- The user must belong to at least one active project to make a reservation. User project associations are discussed in Users section.
- The user must associate their reservation with a project they belong to. If a user has only one project, this is automatic.

The following system reservation policies must be met to allow a reservation to be created or modified. Staff **may override** any of these policies on behalf of a user. If a staff member is making the reservation for themselves, these policies will not be checked.

- The user must complete NEMO training to create reservations.
- The user may not create or move a reservation to have a start time that is earlier than the current time.
- The user may not move or resize a reservation to have an end time that is earlier than the current time.
- The user must be qualified on the tool in question in order to create, move, or resize a reservation.
- If an area requires a reservation a tool reservation in that area may not be made without a corresponding area reservation where the tool start time is within the area reservation.
- An area reservation may not be moved or resized out of range of any tool reservations it originally contained.

5.4.5.2 Area and tool specific reservation policies

Area specific reservation policy setup is discussed in the Detailed administration → Areas section 43.8.

Tool specific reservation policy setup is discussed in the Detailed administration → Tools section 43.64.

Area and tool specific reservation policies can be configured to automatically override for all users based on the time of day and for weekends. This can help promote off hour and weekend usage for high demand tools that have restrictive policies to limit regular weekday hours monopoly of tools.

The following area and tool specific reservation policies must be met to allow a reservation to be created or modified. Staff **may override** any of these policies on behalf of a user. If a staff member is making the reservation for themselves, these policies will not be checked.

- The reservation may not be made more than the area or tool's reservation horizon number of days in advance.
- The reservation must be at least as long as the minimum block time for the area or tool.
- The reservation may not exceed the maximum block time for the area or tool.
- The user may not exceed the maximum number of reservations per user per day for the area or tool.
- The user may not make reservations without the minimum amount of time between reservations for the same user and same area or tool.
- The user may not make reservations exceeding the maximum amount of time they may reserve in the future for the area or tool.

5.4.6 Create a reservation

To create a reservation in NEMO:

- Navigate to the Calendar page.
- Select the area or tool of interest from the tool list on the sidebar.
  - Note: when an area requires a reservation for access, tool reservations can only be made inside of an area reservation window, so make area reservations first.
- Navigate the calendar view to show the start day and time.

- Click the left mouse button and hold at the start day and time.
- While holding the left mouse button, drag to the end day and time.
- Release the left mouse button.
- If the confirmation dialog is enabled in Reservation Confirmation Customization (section 41.3.3) or in the user's preferences (subsection 19.1.2) the user will be presented with a popup to confirm his choice before proceeding (Figure 5.26).

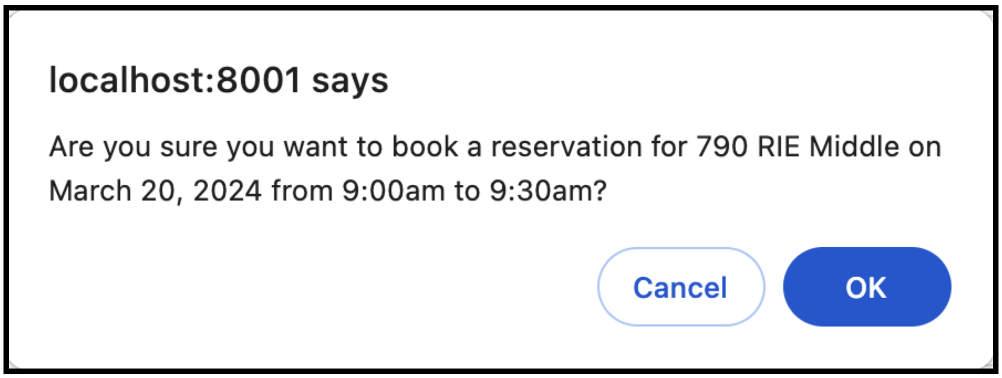


Figure 5.26: *Reservation confirmation dialog*

- The requested reservation will be tested against the reservations policies. If there is a policy conflict, the user will be prompted with a list of conflicts and the reservation will not be made (Figure 5.27). Click ‘Continue’ to close the dialog. Reservation policies are discussed in subsection 5.4.5.

Figure 5.27: *Reservation policy conflict dialog*

- If a user has only one project, it will automatically be selected.
- If a user has multiple projects, they will be prompted to select a project from their list of projects (Figure 5.28). Details about projects can be found on the Accounts and projects chapter 22.

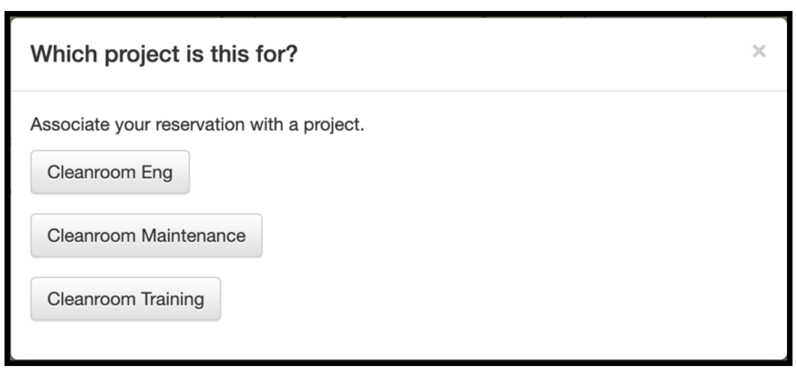


Figure 5.28: *Reservation project selection*

- If a tool/area has a “missed_reservation_threshold” set, a message will appear warning the user that a fee might be charged for missing the reservation (Figure 5.29):

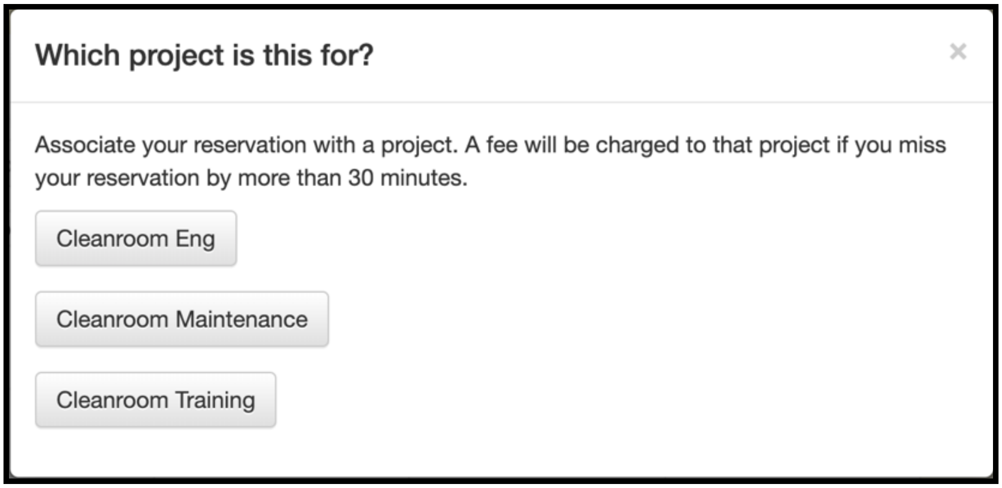


Figure 5.29: *Reservation project selection with missed reservation message*

- Project information is needed to implement missed reservation and tool configuration accounting. Staff are exempt and therefore will not be asked for a project when making reservations.

- If there are reservation questions, a form will appear asking the user to answer the questions. Reservation questions are discussed in the Reservation Questions section 43.38.

- If the tool is configurable, a configuration dialog will appear. Tool configurations collect information about how a tool will be run by the user and can be collected for informational purposes or to prompt staff to configure a tool for a user. Configuration history is saved in the database. Each tool configuration has a minimum advanced notice. If the reservation request is within the advance notice window, the user will be prompted in red at the top of the window that the staff may not be able to accommodate the request. Select the appropriate options and provide details as necessary (Figure 5.30). Configurations are discussed in the Configuration Agenda chapter 26.

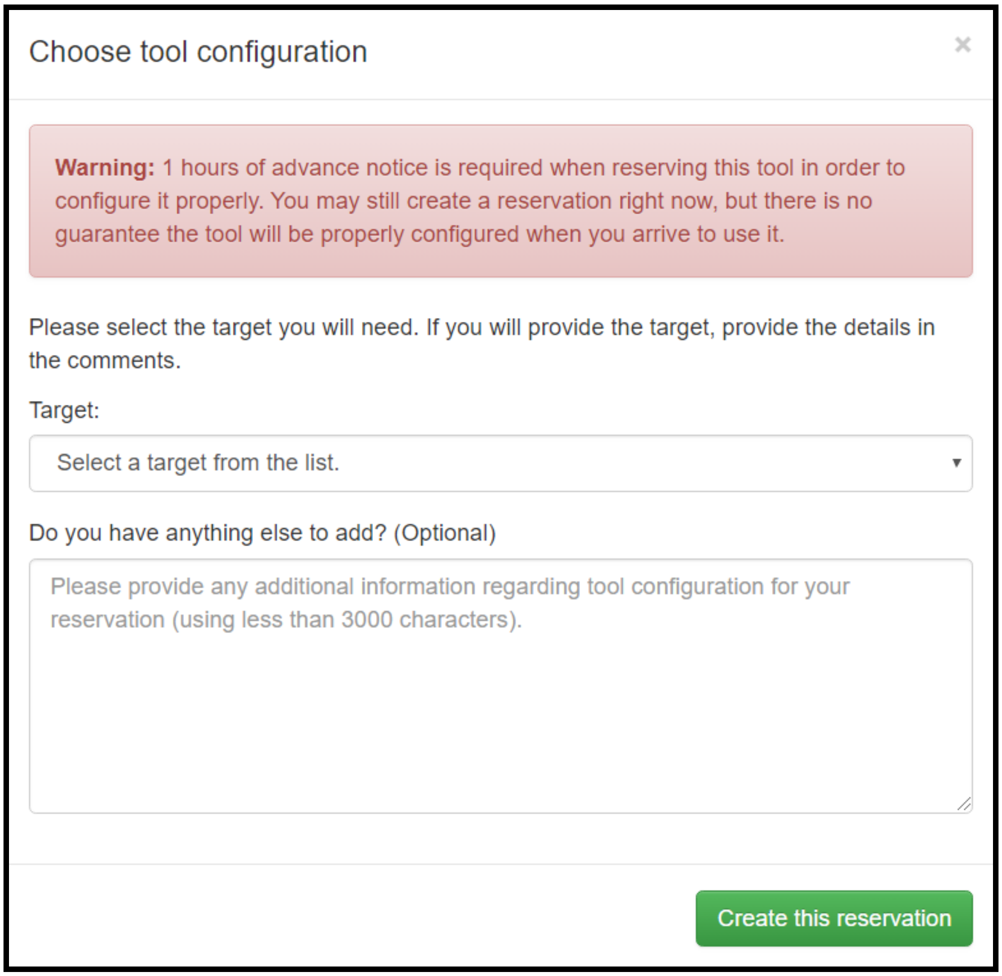


Figure 5.30: *Reservation tool configuration*

- For tool reservations, if the area has a reservation warning person limit configured, the user will be prompted with a message to inform them of the number of people expected in the area and to consider social distancing when making reservations (Figure 5.31). In addition, if multiple people are expected in the same location within an area that information is provided as well. Areas are defined in the area table of the database and discussed in the Detailed administration → Areas section 43.8. Locations are defined in the tool table of the data base and discussed in the Detailed administration → Tools section 43.64.

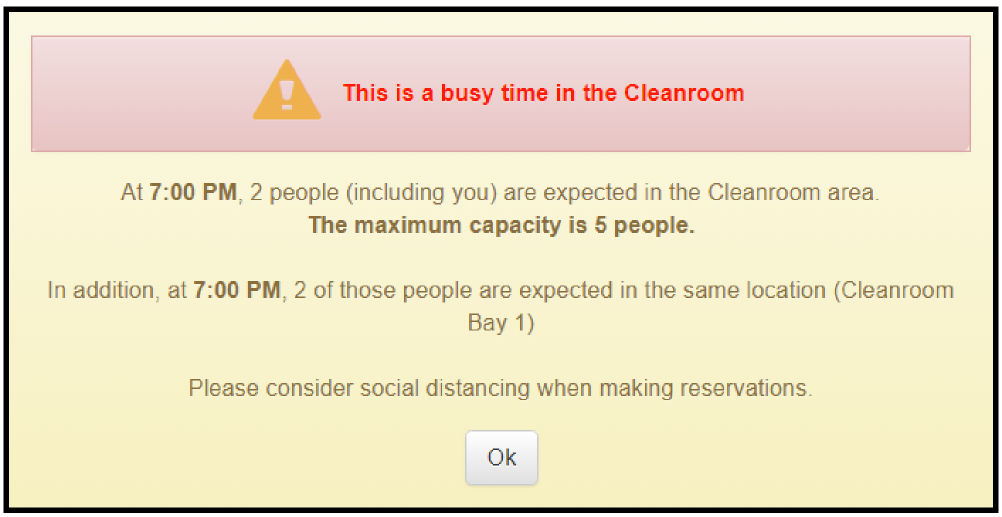


Figure 5.31: *Reservation occupancy warning*

- The reservation will be written to the Reservations table in the database which is discussed in the Detailed administration → Reservations section 43.39.

- The reservation will appear on the calendar.

5.4.7 Move a reservation

- Move the mouse pointer into the middle of the reservation to be moved. If you have permission to move the reservation, the mouse pointer will change from the arrow to a hand.
- Click the left mouse button and hold.
- While holding the left mouse button, drag the reservation to the new day and time.
- Release the left mouse button.
- If the confirmation dialog is enabled in Reservation Confirmation Customization (section 41.3.3) or in the user's preferences (subsection 19.1.2) the user will be presented with a popup to confirm his choice before proceeding (Figure 5.32).

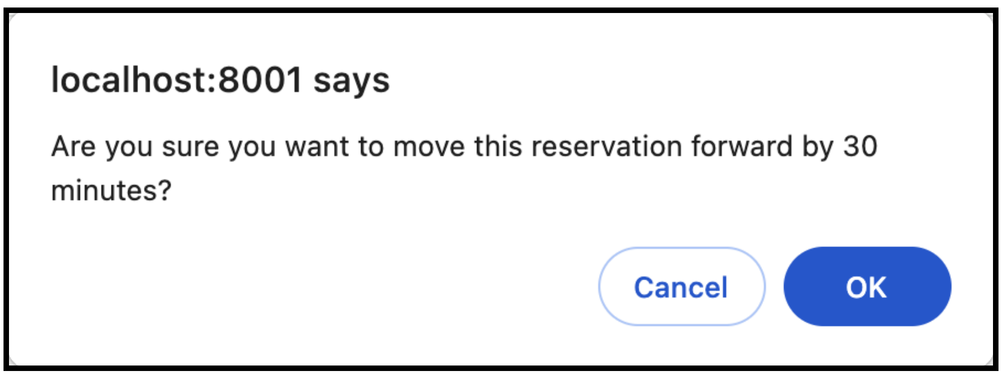


Figure 5.32: *Reservation confirmation dialog*

- The requested move will be tested against the reservations policies. If there is a policy conflict, the user will be prompted with a list of conflicts and the reservation move will not be made (Figure 5.33). Click '**x**' to close the dialog. Reservation policies are discussed in the reservation policies subsection 5.4.5.

- NOTE: An area reservation may not be moved out of range of any tool reservations it originally contained.
- Any time a reservation is moved, the old reservation is cancelled and a new reservation with updated information takes its place. The descendant field links the old reservation to the new one, so the history of reservation moves, and changes can be easily tracked.

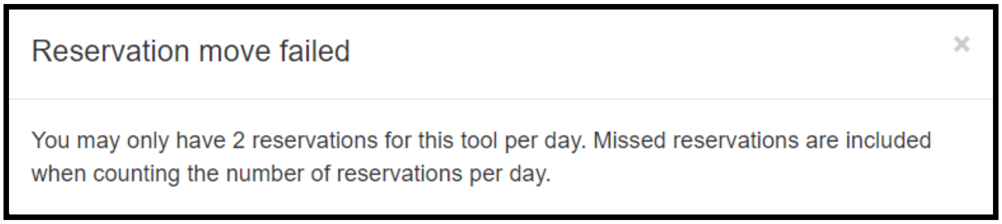


Figure 5.33: *Reservation move failed dialog*

5.4.8 Resize a reservation

- Reservations may only be resized to change the end time. If the reservation needs to start at an earlier time, move the reservation to the new start time, then resize it.
- Move the mouse pointer over the bottom of the reservation to be resized. If you have permission to resize the reservation, the mouse pointer will change from the arrow to a double arrow and two stacked lines will appear at the bottom middle of the reservation (Figure 5.35).
- Click the left mouse button and hold.
- While holding the left mouse button, drag the reservation end time to the new day and time.
- Release the left mouse button.

- If the confirmation dialog is enabled in Reservation Confirmation Customization (section 41.3.3) or in the user's preferences (subsection 19.1.2) the user will be presented with a popup to confirm his choice before proceeding (Figure 5.34).

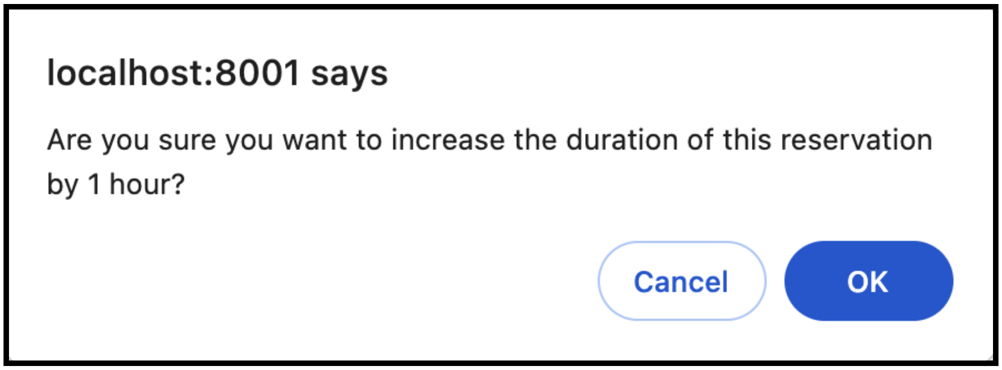


Figure 5.34: *Reservation confirmation dialog*

- The requested resize will be tested against the reservations policies. If there is a policy conflict, the user will be prompted with a list of conflicts and the reservation resize will not be made (Figure 5.36, Figure 5.27). Click '**x**' to close the dialog.
- NOTE: An area reservation may not be resized out of range of any tool reservations it originally contained.
- Any time a reservation is resized, the old reservation is cancelled and a new reservation with updated information takes its place. The descendant field links the old reservation to the new one, so the history of reservation changes can be easily tracked.

Figure 5.35: *Reservation resizing bottom change*

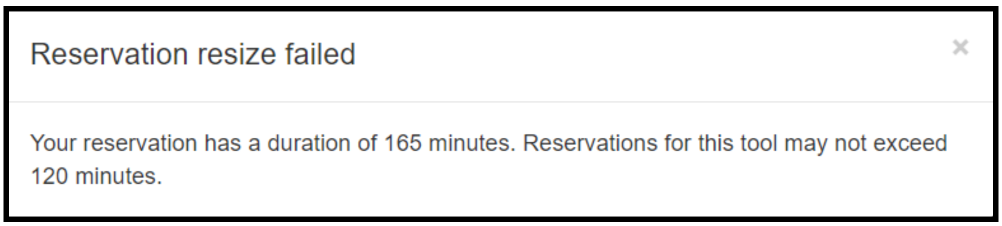


Figure 5.36: *Reservation resize failed dialog*

5.4.9 View details or delete a reservation

- Single click the center of the reservation.
- A reservation detail dialog will be displayed that provides additional information (Figure 5.37)

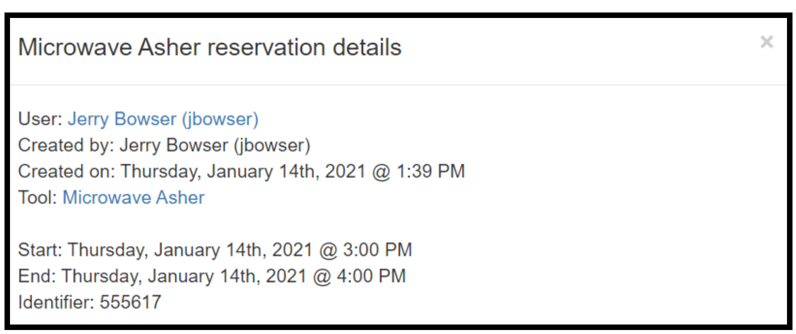


Figure 5.37: *User reservation details dialog*

- Who created the reservation, this is a link that once clicked will provide an email dialog through NEMO to contact the user.
- When the reservation was created.
- The area or tool reserved, for tool reservations, the name is a link to the tool page.
- The project.
  - If the user has multiple projects the selected project can be changed.
  - Click the edit icon on the right.
  - The project will change to the update dialog (Figure 5.38).

Figure 5.38: *Reservation project change dialog*

  - Select the new project from the dropdown list (Figure 5.39).

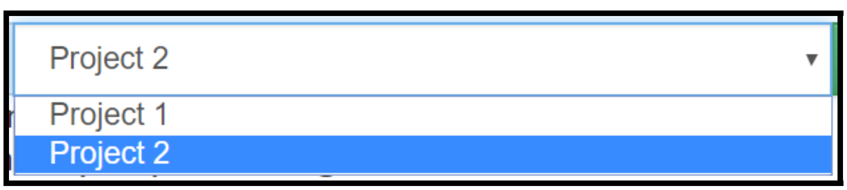


Figure 5.39: *Reservation project change dropdown*

  - Click the change project button to complete (Figure 5.40).

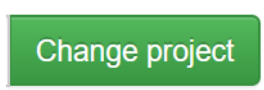


Figure 5.40: *Reservation project change button*

  - The start time and end time.
    - If the user looking at the details is a staff member or is the user whose reservation it is, the start and end times can be edited.
    - Click the edit icon on the right.
    - Change the date and click the change button to complete (Figure 5.41).

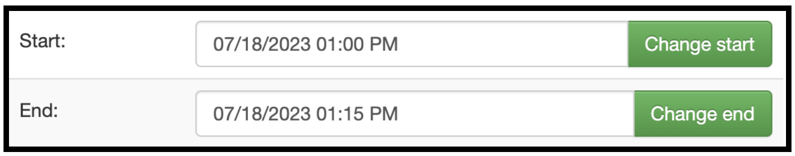


Figure 5.41: *Reservation dates change*

  - Staff Only – two additional fields are provided for staff (Figure 5.42).
    - A title for the reservation can be set to users see a more descriptive reason for a staff reservation. This can be useful to indicate process qualifications or baselines. Type a title into the dialog box then click 'Set title'.
    - A cancelation reason box will appear next to the cancel if a staff member clicks on another user's reservation including another staff member. Staff can delete any reservation however they must give a reason that will be emailed to the impacted user. Type a reason for canceling the reservation into the dialog box then click 'Cancel this reservation'.

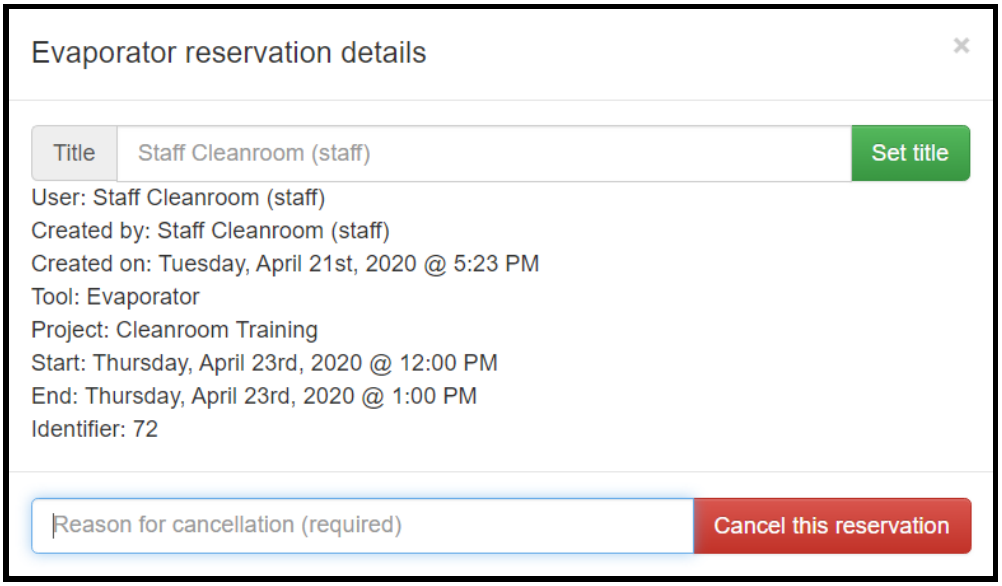


Figure 5.42: *Staff reservation details dialog*

- Click the '**x**' to close the details without deleting the reservation.
- Click the 'Cancel this reservation' button to cancel the reservation.
- Note: users may only cancel their own reservations that have not have not passed the end time.
- Any time a reservation is canceled, the canceled field in the reservation table is set.

5.4.10 Reservation email notifications

NEMO can send email notifications to staff and users

- There are user settable preferences to send reservation and cancelation emails with calendar invites. User preferences are discussed in the User preferences chapter 19.

- If staff cancels a user reservation, the user will receive an email notification regardless of user preference settings as described in the Customization → Cancellation email subsection 41.5.9.
- Users are sent a reminder email approximately two hours prior to the start of a reservation. The email serves to not only remind user of upcoming reservations but also to alert them to any potential problems with the reserved tool as described in Customization → Reservation reminder email and Customization → Reservation warning email sections 41.5.20 and 41.5.21, respectively.

5.4.11 Missed reservations

Each area and tool can be configured to automatically cancel a user's reservation if they are late logging in by more than the missed reservation threshold number of minutes. A missed reservation event requires three items to be setup.

1. A missed reservation threshold must be entered for any areas or tools that will trigger a missed reservation as discussed in the Detailed administration → Areas section 43.8 and in the Detailed administration → Tools section 43.64.
2. A missed reservation email can optionally be configured to notify the user and lab staff that a reservation was missed as described in the Customization → Missed reservation email subsection 41.5.14.
3. A timed service app must be properly configured and running which is described in the NEMO timed services section 54.3.

If configured, once the missed reservation threshold is exceeded, the reservation will be canceled, marked as missed in the reservation table, and email notifications sent.

If an area or tool is shutdown, a missed reservation will not be triggered.

All staff reservations are exempt from this rule.

5.4.12 Reserve for someone else (staff only)

The reserve for someone else feature gives staff the ability to override reservation policies on behalf of a user. For example, reserving a tool for a user before they complete qualification on a tool or reserving further in advance due to special travel. The button is only visible if the user logged in is designated as staff.

Clicking the ‘Reserve for someone else’ button will display the selection dialog (Figure 5.43). Type the user’s name in the search box. The return list updates automatically as typed, and a tool can be clicked from the list at any time (Figure 5.44). Once clicked, the button dialog changes to “Reserving as [user]”. Proceed to make reservations.

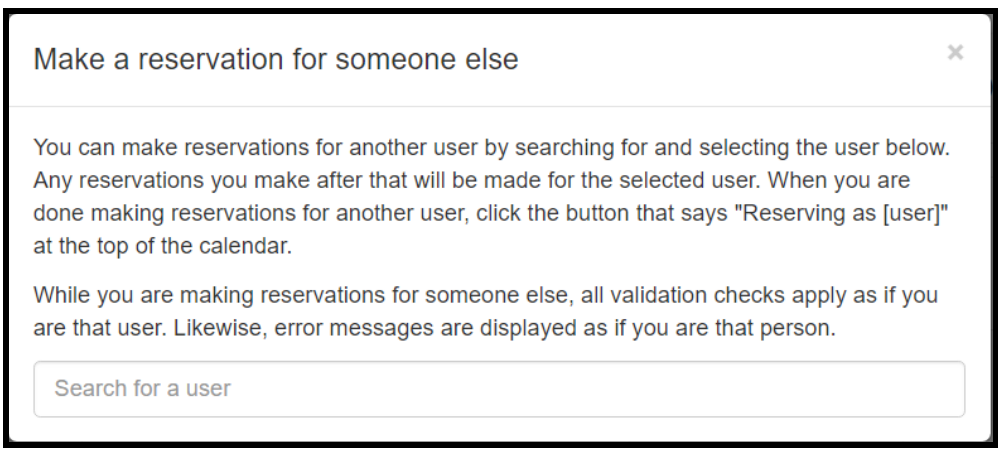


Figure 5.43: *Make a reservation for someone else dialog*

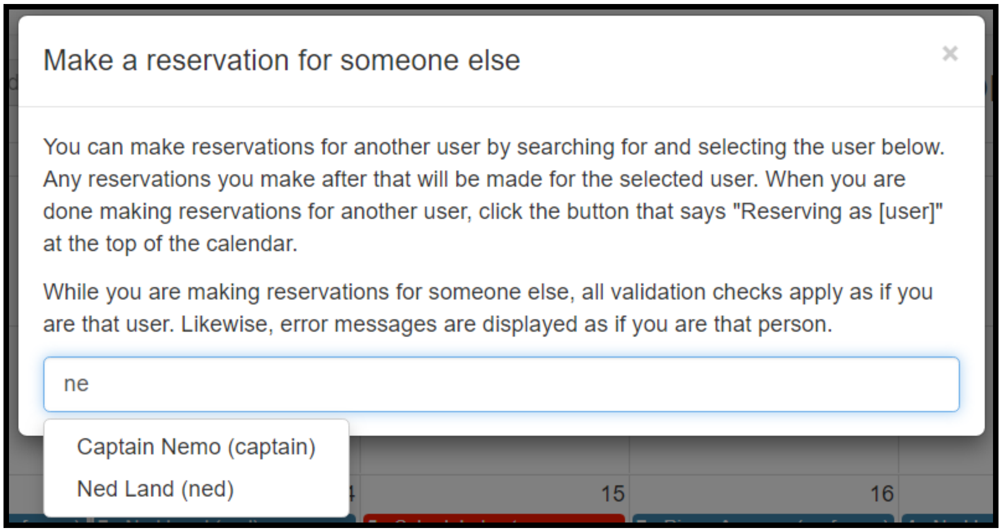


Figure 5.44: *User search return list*

If a reservation made on behalf of another user violates the user reservation policy a dialog will be shown to prompt the staff member with a list of policy conflicts and buttons to override the policy or not create the reservation (Figure 5.45). Clicking override will make the reservation for the user and override any policy violations. Reservation policies are discussed below.

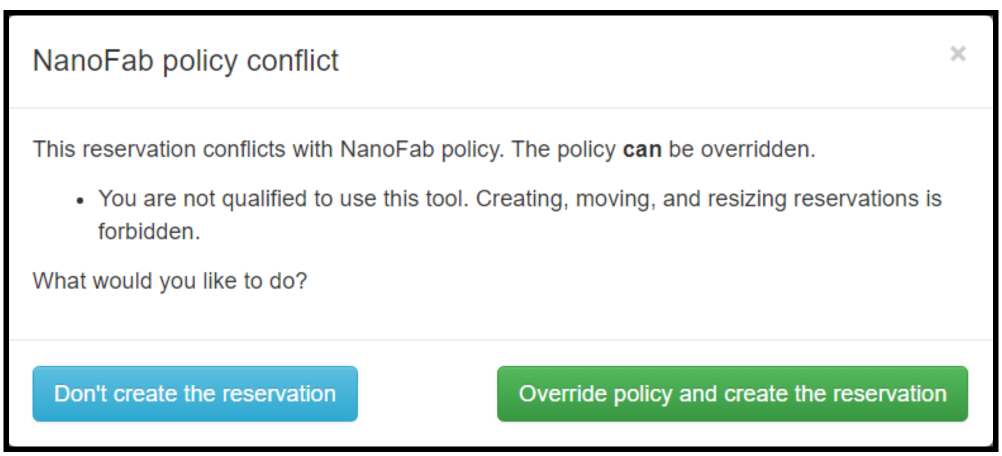


Figure 5.45: *Reservation policy conflict*

To end making reservations on behalf of the user, click the “Reserving as [user]” button on the calendar header. The button text will return to “Reserve for someone else”.

5.4.13 Schedule an outage (staff only)

The scheduled outage feature allows staff to make either single or recurring reservations that will automatically change an area or tools status to shut down. This prevents user login at automatic intervals which can be helpful for maintenance tasks such as changing tool configurations or executing pre-maintenance ‘behind the scenes’ tasks that could be impacted by users inadvertently operating a tool.

Clicking the ‘Schedule an outage’ button will remove the ‘Reserve for someone else’ button and change the ‘Schedule an outage’ button text to ‘I’ve finished creating scheduled outages’. After defining the start and end time, a dialog will appear (Figure 5.46).

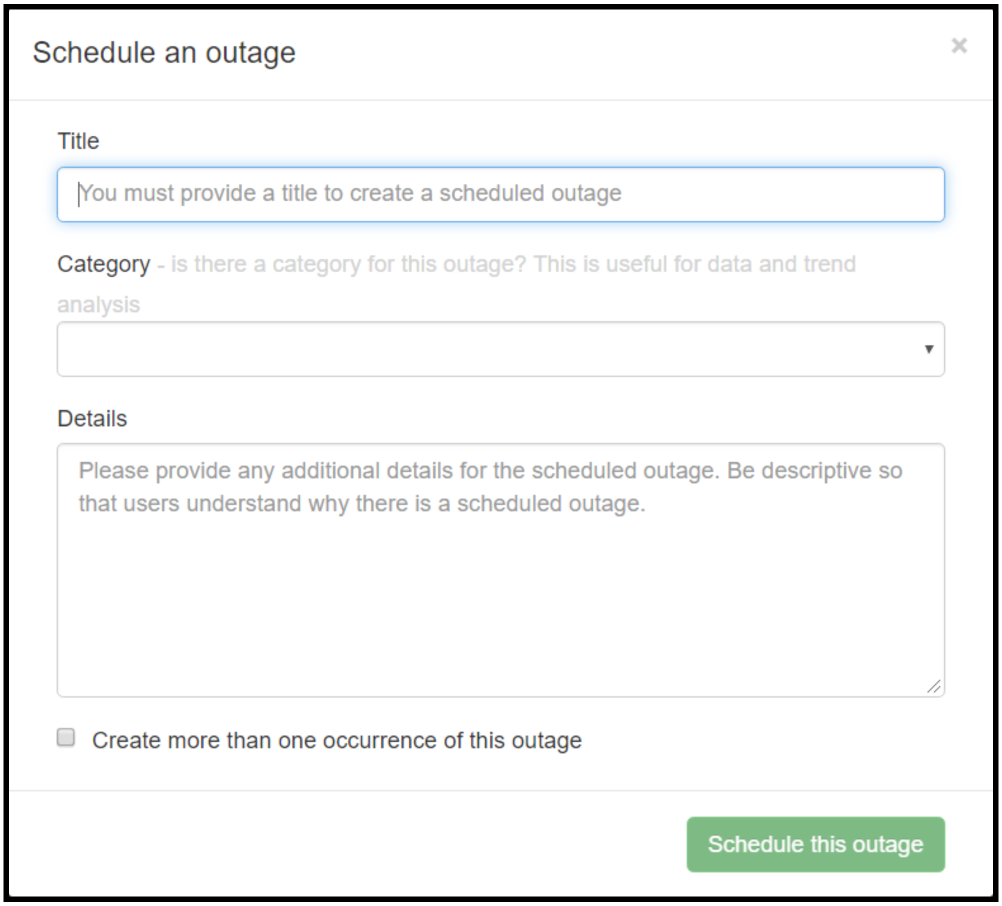


Figure 5.46: *Scheduled outage dialog*

A title is required and should provide a brief description of the why the area or tool is scheduled for an outage. An optional category will appear if any scheduled outage categories are defined. Categories can be useful for data analysis. An optional details box can be used to provide more in-depth information.

To create recurring outages, click the check box labeled 'Create more than one occurrence of this outage'. A new dialog will appear (Figure 5.47) under the check box to enter the frequency and end time. Recurring outages can only be scheduled up to 90 days in advance. It is important to note that recurring outages become standalone reservations once they are created and cannot be modified as a group. However, individual occurrences can be deleted in the calendar or bulk deleted in Detailed Administration.

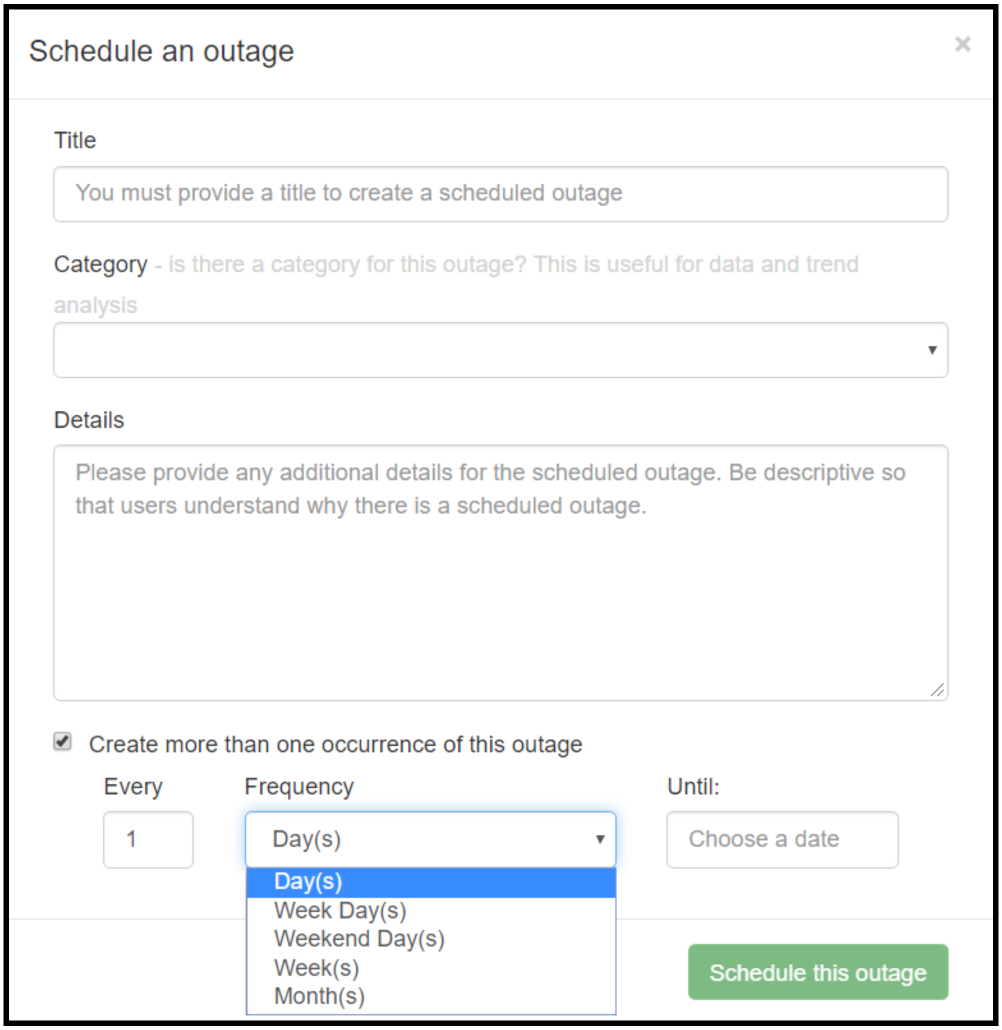


Figure 5.47: *Scheduled outage recurrence*

To complete the reservation, click the ‘Schedule this outage’ button. The scheduled outage will appear on the calendar in red listing the start and end time as well as the title provided. The example in (Figure 5.48) shows a scheduled shutdown that had a title of ‘Monthly PM’. The details can be seen by clicking the reservation on the calendar.

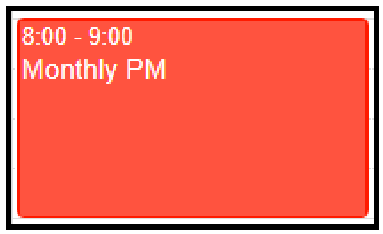


Figure 5.48: *Example scheduled outage*

5.5 Showing Configuration agenda

Selecting “Configuration agenda” mode from the calendar sidebar will display tool reservations containing configuration settings the user picked when making his reservation (Figure 5.49).
The color palette can be customized for each individual configuration setting in Detailed administration → Configuration section 43.16.

Figure 5.49: *Calendar side bar in Configuration agenda usage mode*

5.5.1 Calendar view

Reservations containing configuration settings are viewable for the selected tool in the time window displayed (Figure 5.50). Configuration displays in blue by default (but can be customized with a different color for each configuration setting) and shows the start time, end time, the reservation user and each of the configuration settings. NEMO automatically updates the view upon any navigation change for tool selection or time window. A scroll bar will appear on the right side of the calendar view to allow scrolling the time window. Clicking on any event box will show additional details (Figure 5.51).

Chapter 5 Calendar

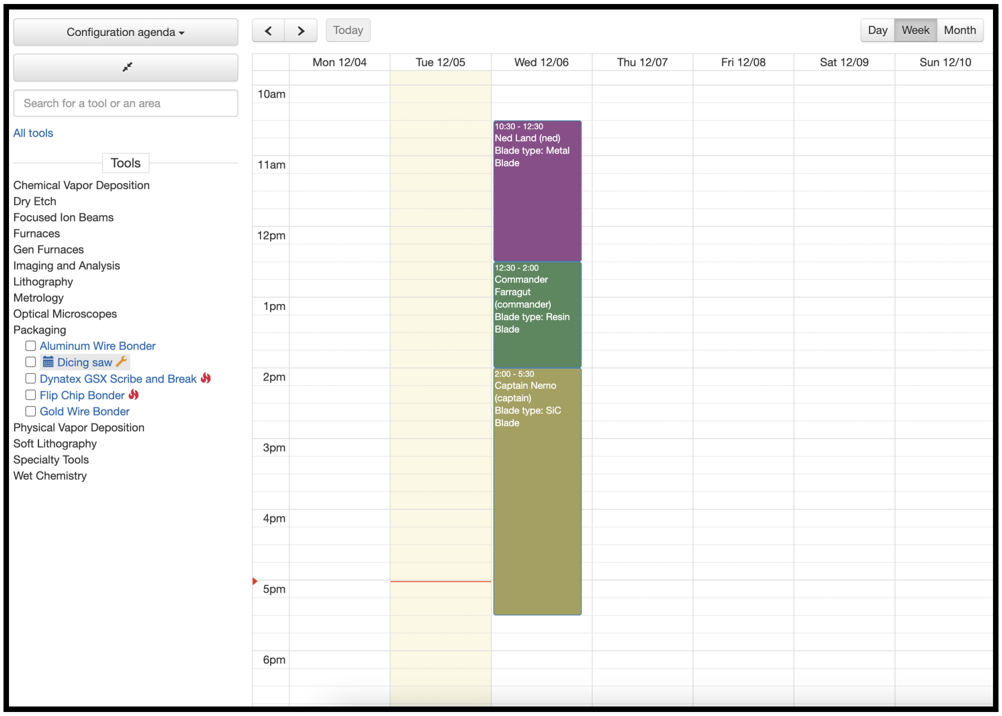


Figure 5.50: *Calendar view configuration agenda of a tool*

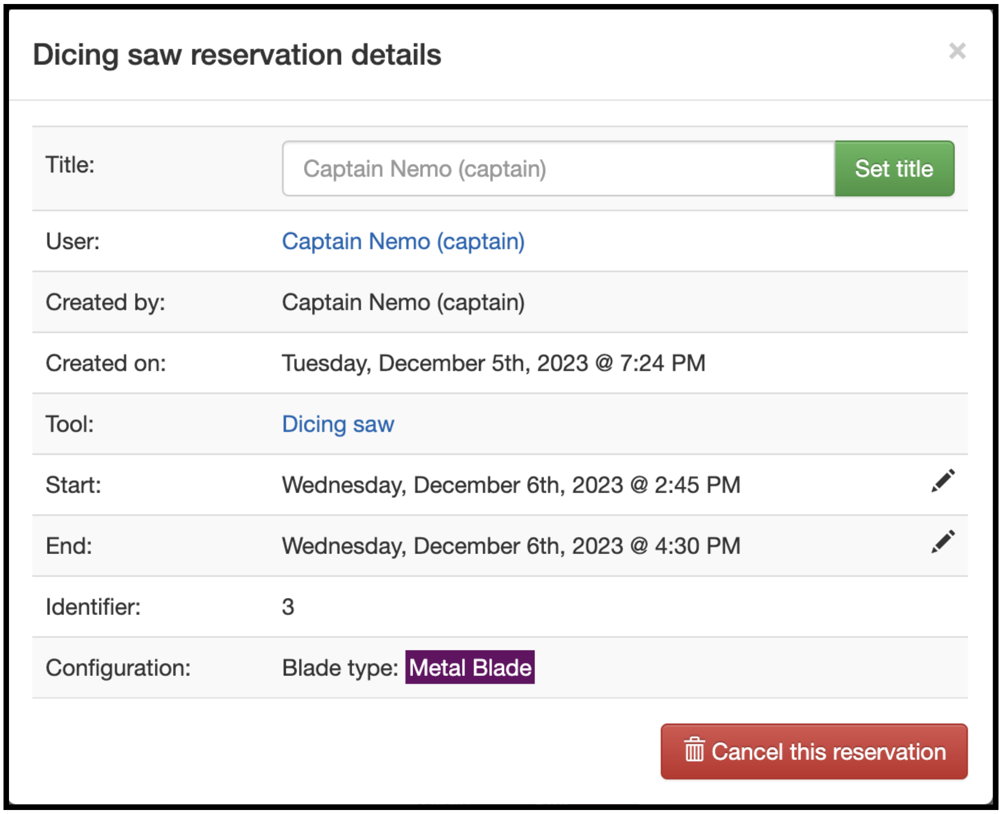


Figure 5.51: *Reservation details dialog*

5.5.2 All tools views

Selecting “All tools” will allow the user to see all tool configurations simultaneously (Figure 5.52).

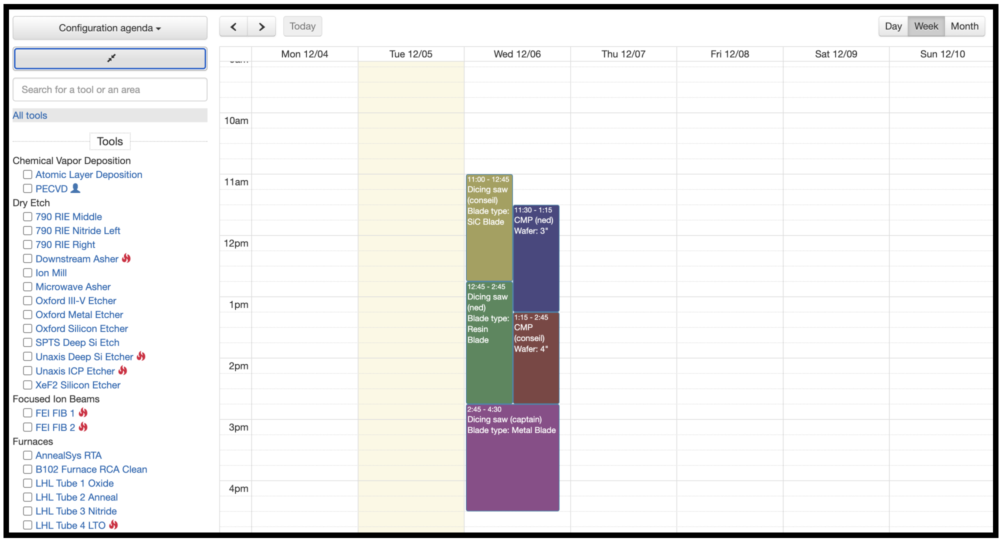


Figure 5.52: *All tools configuration agenda view*

5.6 Showing Facility use

Selecting “Facility use” mode from the calendar sidebar will display activity history on the calendar (Figure 5.53).

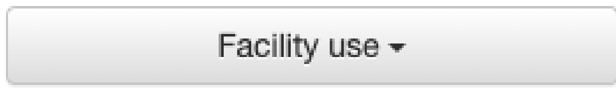


Figure 5.53: *Calendar side bar in Facility use mode*

5.6.1 Calendar view

Area or tool activity and missed reservations for all users are viewable for the selected area or tool in the time window displayed (Figure 5.54). Tool usage displays in blue and shows the start time, end time, and user that used the tool. Area access displays in orange. Missed reservations display in red and show the user, start time, end time. NEMO automatically updates the view upon any navigation change for tool selection or time window. A scroll bar will appear on the right side of the calendar view to allow scrolling the time window. Clicking on any activity box will show additional details (Figure 5.55, Figure 5.56).

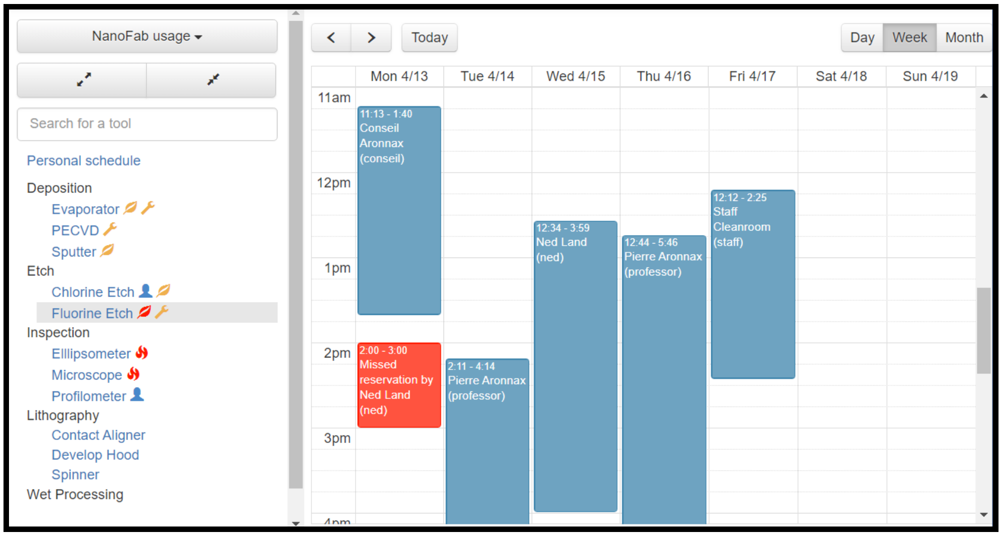


Figure 5.54: *Calendar view usage of a tool*

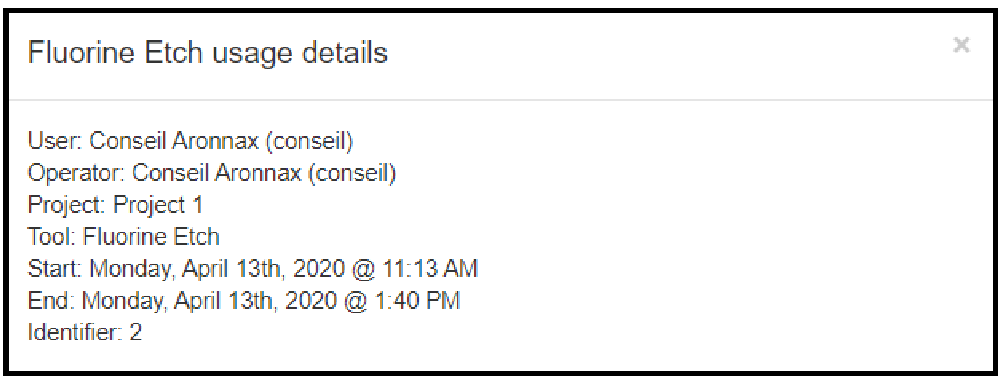


Figure 5.55: *Tool usage details dialog*

Figure 5.56: *Missed reservation details dialog*

5.6.2 Personal schedule view

The personal schedule view will display all activity for the user in the current time window (Figure 5.57). Tool usage displays in green and shows the start time, end time, and tool name. Missed reservations display in red and show start time, end time, and tool name. Area access displays in gold and shows start time, end time, and area name. Clicking on any activity box will show additional details (Figure 5.58, Figure 5.59, Figure 5.60).

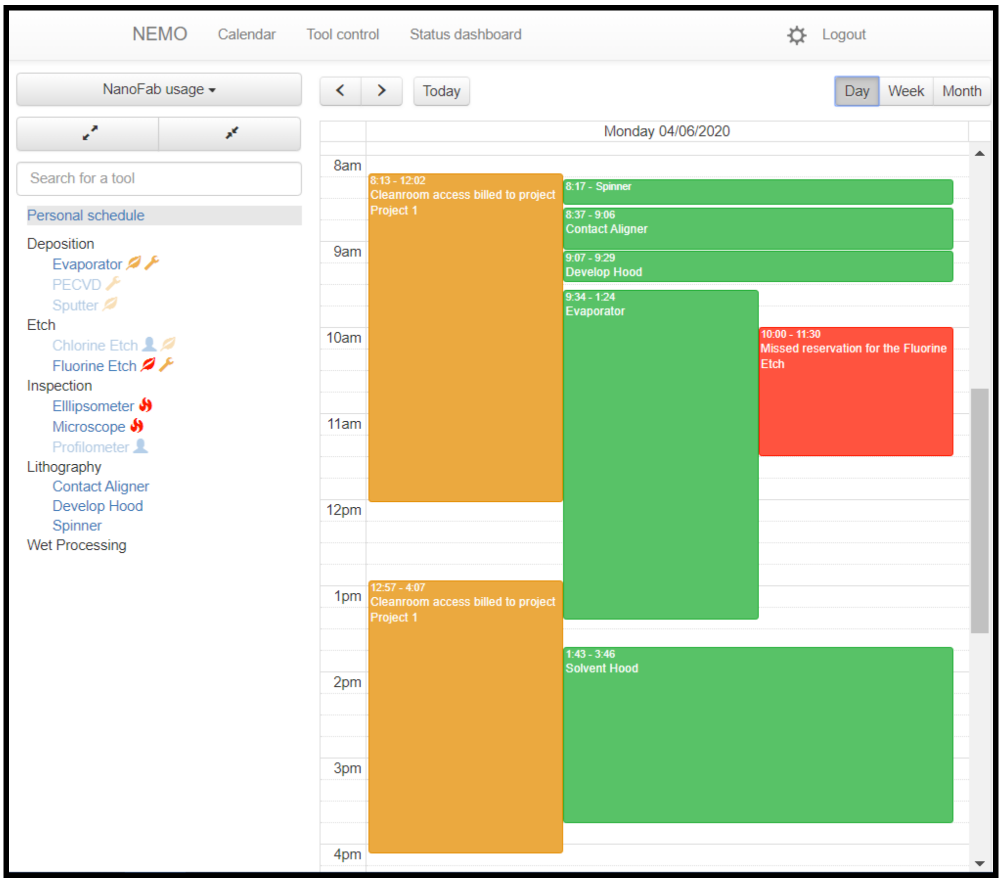


Figure 5.57: *Personal schedule usage view*

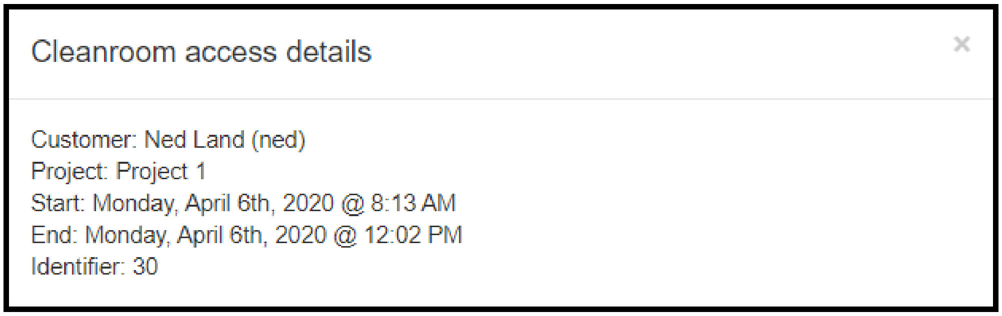


Figure 5.58: *Area access details dialog*

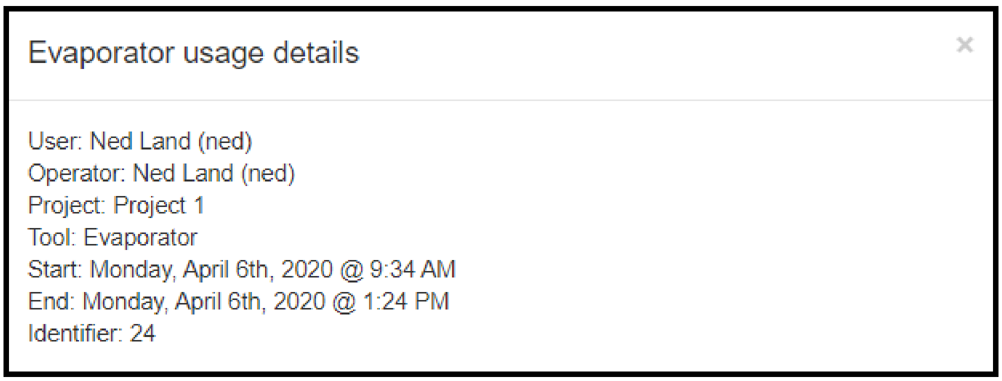


Figure 5.59: *Tool usage details dialog*

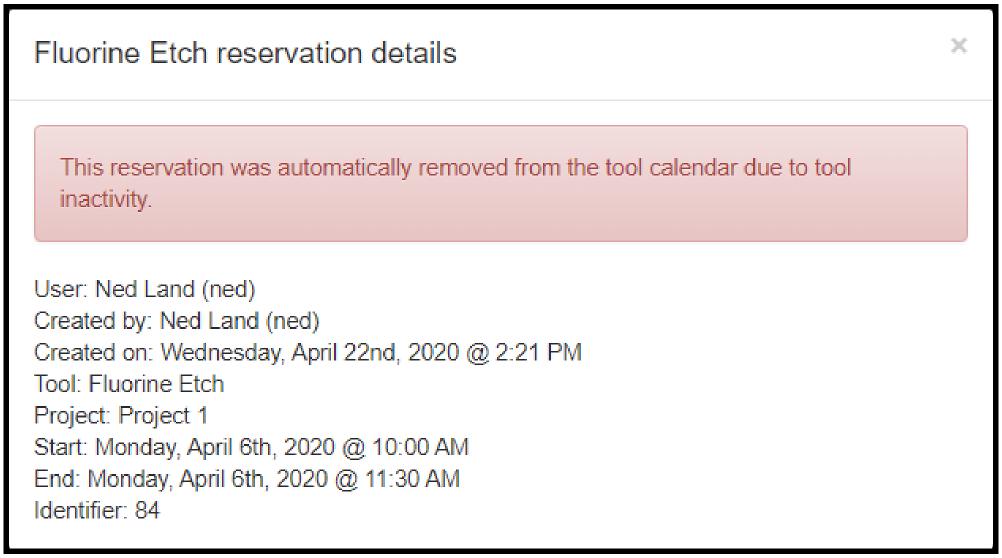


Figure 5.60: *Missed reservation details dialog*

5.6.3 All tools, All areas and All tools and areas views

Similar to the personal schedule, selecting “All tools” will allow the user to see all tool usages (Figure 5.61). The same goes for “All areas” and “All areas and tools”.

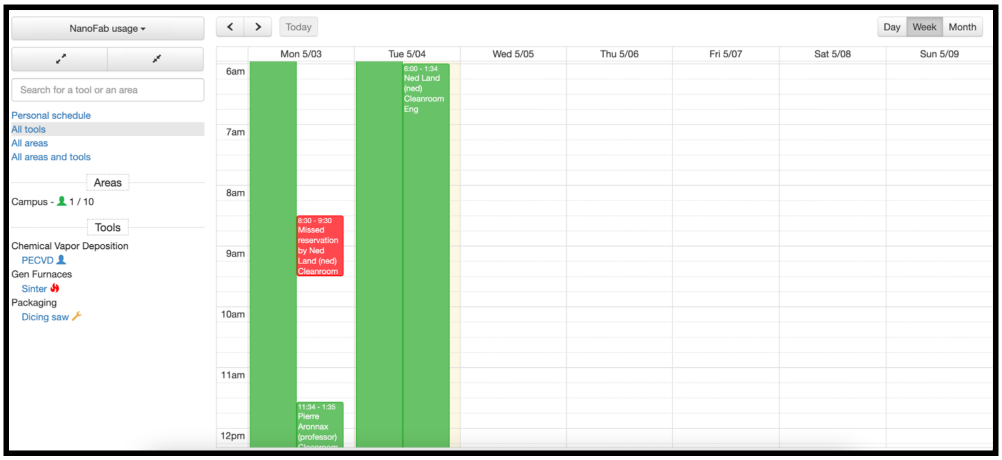


Figure 5.61: *All tools usage view*

5.7 Show reservation and facility use

Selecting “Reservation and use” mode from the calendar sidebar will display both activity and reservation history on the calendar (Figure 5.62).

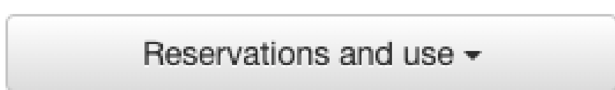


Figure 5.62: *Calendar side bar in Reservation and use mode*

5.8 Show specific user activity (staff only)

Selecting “Specific User” mode from the calendar sidebar will display activity and reservation history of the selected user on the calendar (Figure 5.63).

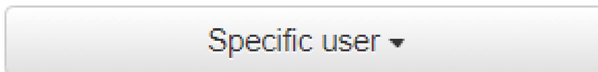


Figure 5.63: *Calendar side bar in Specific user mode*

To find a user, enter any character sequence of the username, first name, or last name in the search dialog on the side bar (Figure 5.64) then select the name of the list returned.

Figure 5.64: *Specific user activity search dialog*

The return list updates automatically as typed, and a user can be clicked from the list at any time (Figure 5.65).

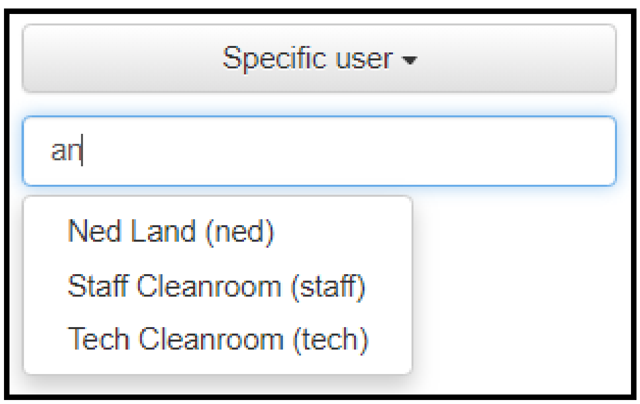


Figure 5.65: *User search return list*

Once clicked, the search box changes to a button with the selected users name (Figure 5.66) and the users information is displayed in the calendar view (Figure 5.67). To switch to another user, click the button showing the current users name and the dialog will switch back to the search box.

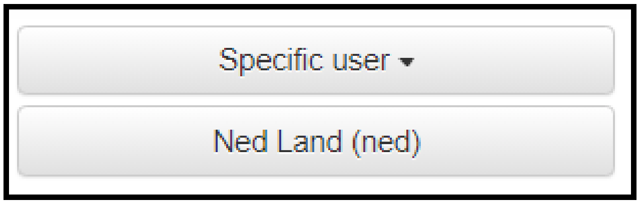


Figure 5.66: *Search dialog now shows user*

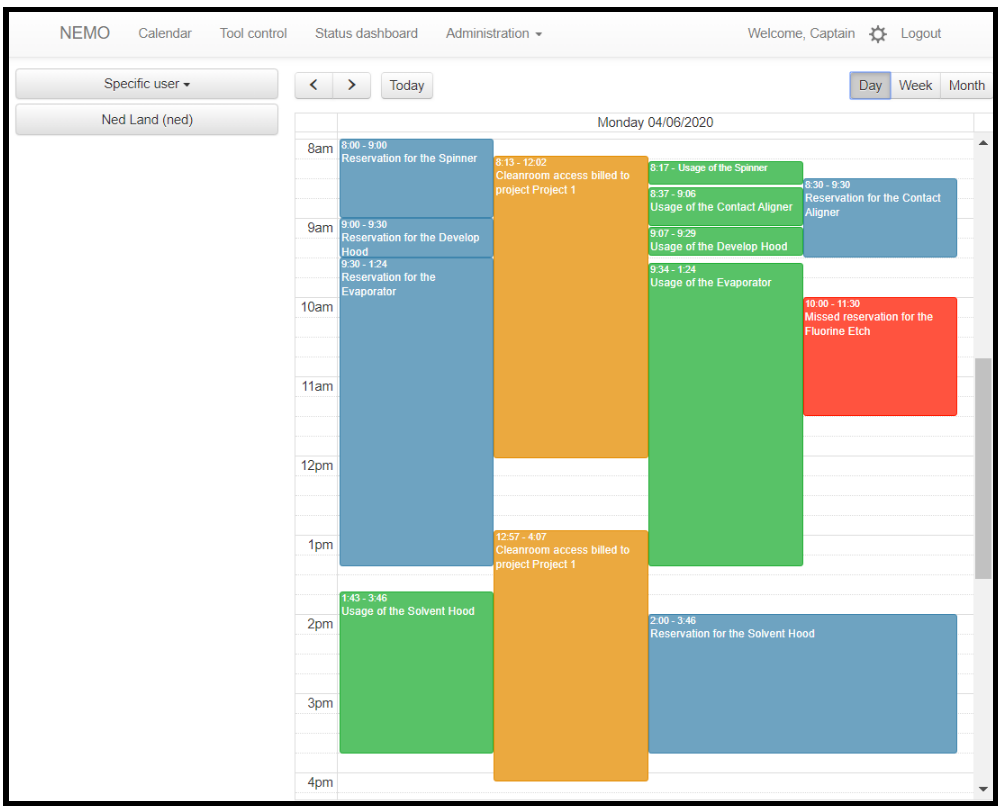


Figure 5.67: *Specific user activity and reservation view*

Tool usage displays in green and shows the start time, end time, and tool name. Missed reservations display in red and show start time, end time, and tool name. Area access displays in gold and shows start time, end time, and area name. Reservations displays in blue and shows start time, end time, and tool name. Clicking on any activity box will show additional details (Figure 5.68, Figure 5.69, Figure 5.70, Figure 5.71).

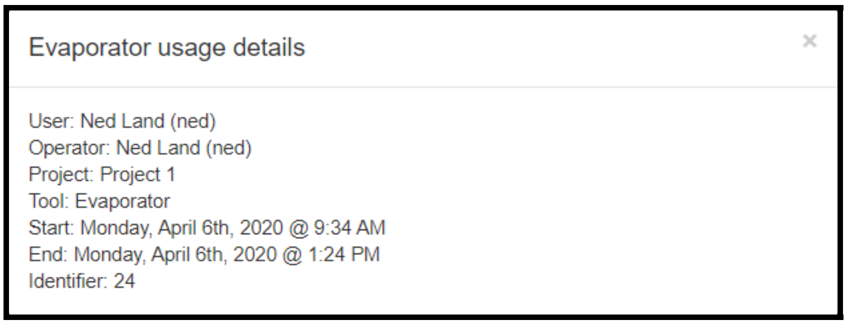


Figure 5.68: *Tool usage details dialog*

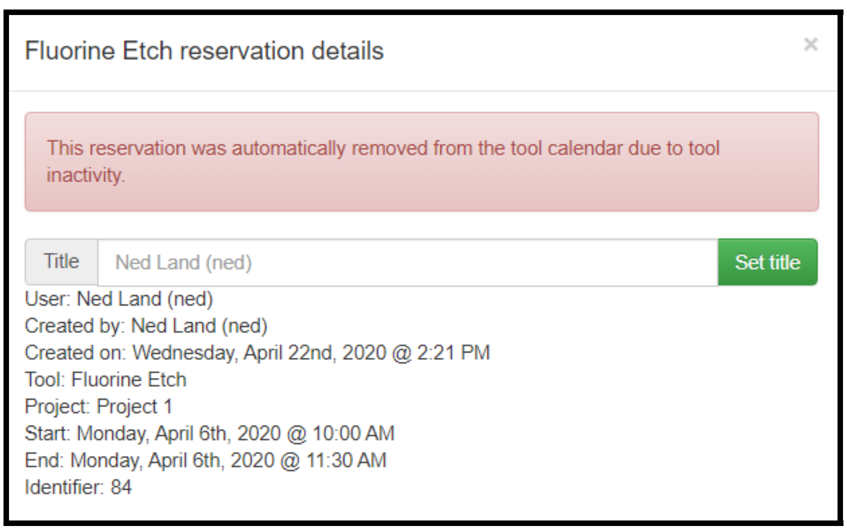


Figure 5.69: *Missed reservation details dialog*

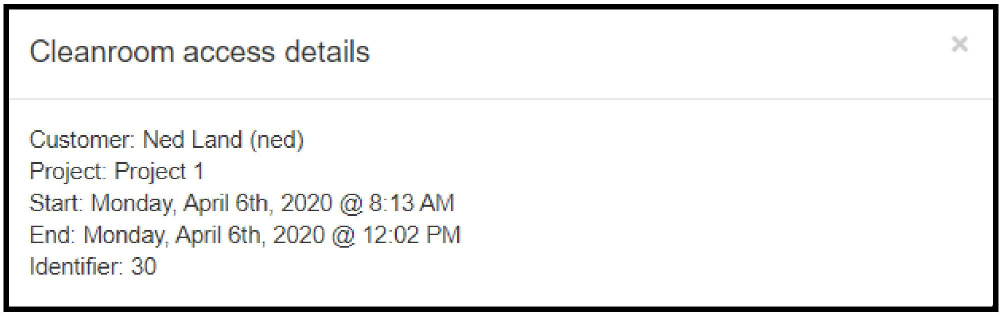


Figure 5.70: *Area access details dialog*

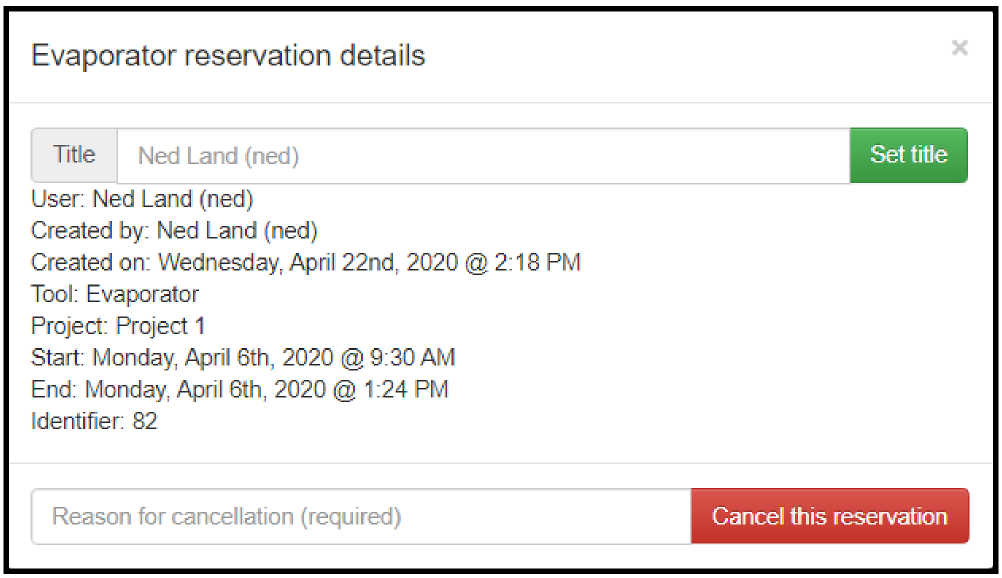


Figure 5.71: *Reservation details dialog*

5.9 Mobile device calendar

The calendar page will automatically change to a mobile display by stacking information into a single scrollable column (Figure 5.72). A subset of features is available while in mobile view. To start, directly enter the name of the area or tool in the search dialog or select a tool by category. All categories and sub-categories are listed.

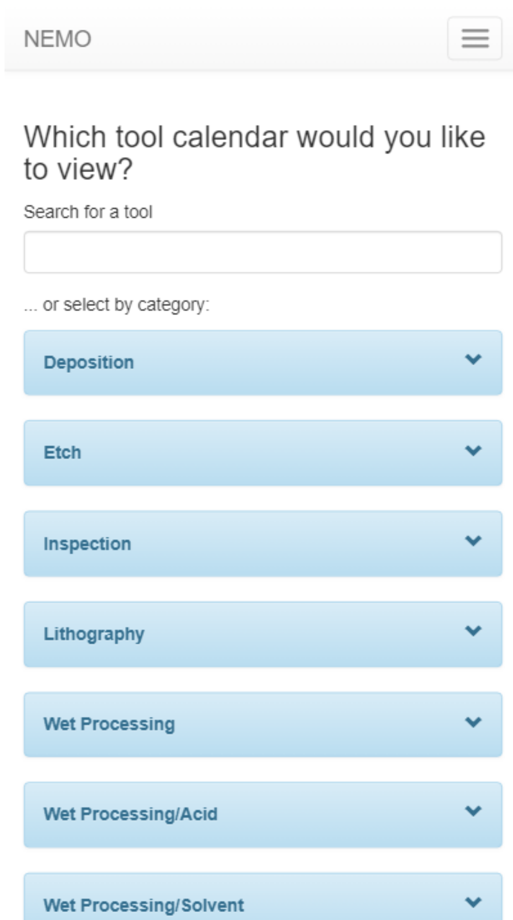


Figure 5.72: *Mobile calendar page*

5.9.1 Search for an area or tool

To search for an area or tool, start typing in the search dialog box. A button list will appear below the search dialog as characters are entered but at least two characters must be entered (Figure 5.73). Once the area or tool of interest appears, click the button of interest to go to the mobile reservation page.

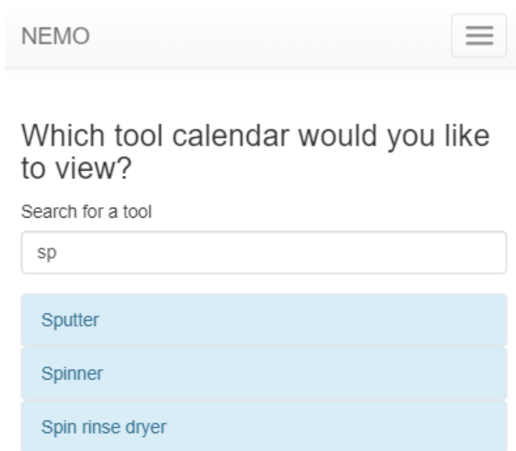


Figure 5.73: *Mobile calendar search box and results*

5.9.2 Select a tool by category

To select a tool by category, click the category button then click the tool link in the drop down. If the tool of interest is not on the list, click another category button (Figure 5.74). Note: it is possible to have more than one category at a time expanded. However, the page resets each time it is opened. Once the tool of interest appears, click the button of the tool of interest to go to the mobile tool reservation.

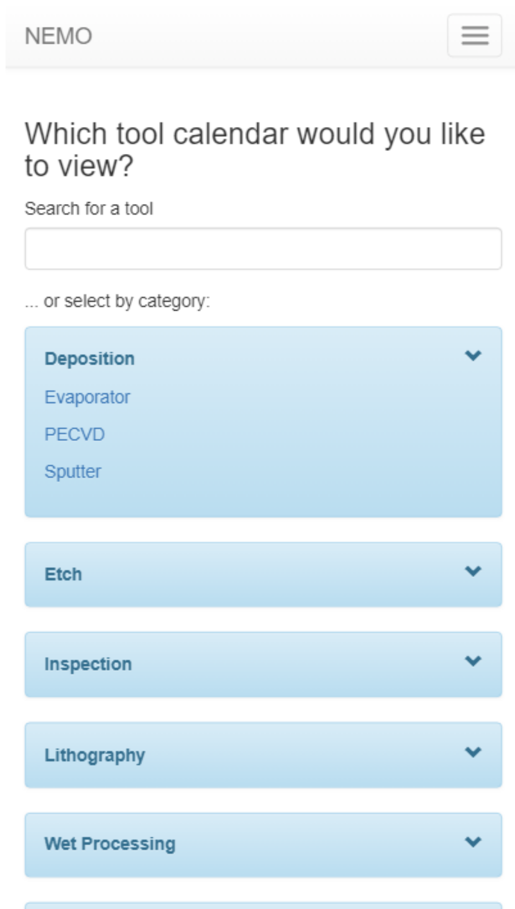


Figure 5.74: *Mobile calendar category drop down*

5.9.3 Mobile reservation page

The mobile reservation will show the current day reservations (Figure 5.75). Only a one-day view is available in mobile view. Left and right arrows at the top of the page increment or decrement the day. Any reservations for the currently listed day are shown. An add reservation icon is on the bottom right and a tool control icon Control is on the bottom left.

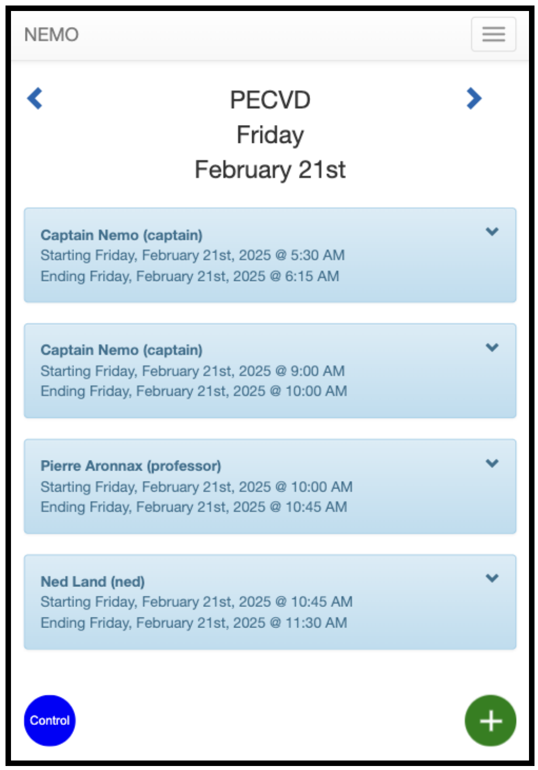


Figure 5.75: *Mobile tool reservation page*

5.9.4 View details or delete a reservation

Clicking the down arrow on a reservation shows details (Figure 5.76). A user may cancel their own reservation (Figure 5.77). Staff may cancel any reservation but must enter a reason for canceling another users reservation (Figure 5.78).

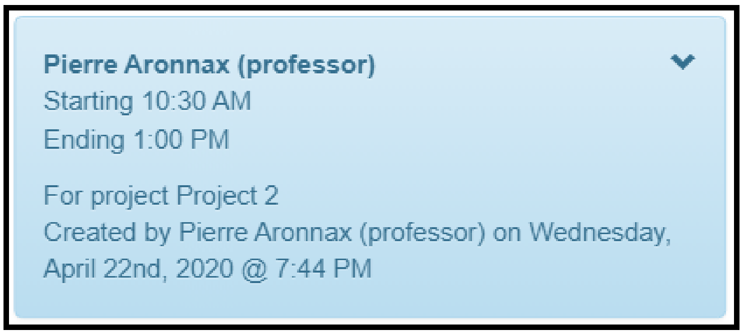


Figure 5.76: *Mobile view another user's reservation*

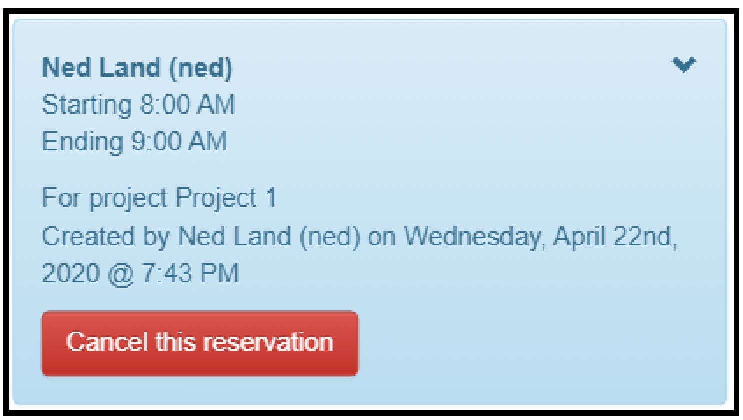


Figure 5.77: *Mobile view a reservation you own*

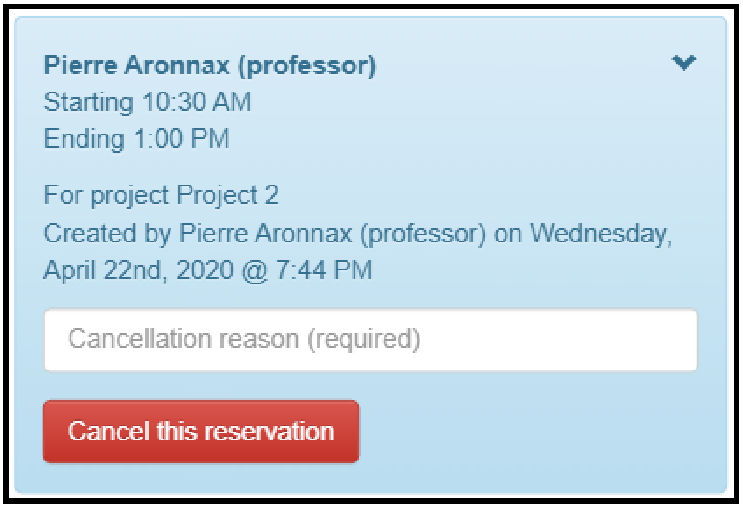


Figure 5.78: *Mobile view another user's reservation (staff)*

5.9.5 Creating a reservation

To create a reservation in NEMO through the mobile view:

- Navigate to the tool reservation page.
- Click the add reservation icon on the bottom right of the screen to navigate to the top of the create a new reservation page (Figure 5.79).

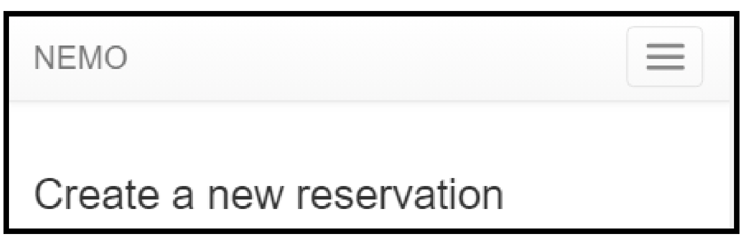


Figure 5.79: *Mobile create new reservation dialog*

- If the user has multiple projects, a project dialog will appear just below the title (Figure 5.80). However, if a staff member has multiple projects, they will not be prompted for a project because they are exempt from missed reservation and tool configuration accounting. Select the project to use for the reservation. Details about projects can be found in the Accounts and projects chapter 22.

Figure 5.80: *Mobile reservation multiple project dialog*

- If the tool selected has a configuration that can be selected by the user, a configuration dialog will appear next. Each tool configuration has a minimum advanced notice. If the reservation request is within the advance notice window, the user will be prompted in red at the top of the window and the staff may not be able to accommodate the request. Select the appropriate options and provide details as necessary (Figure 5.81).

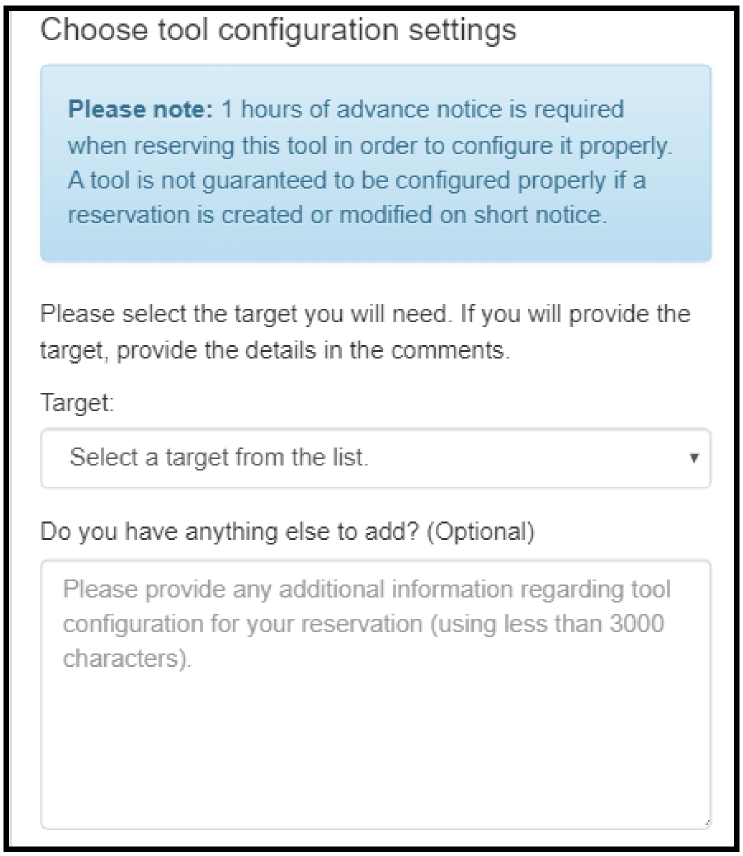


Figure 5.81: *Mobile reservation tool configuration dialog*

- Next, select the date and time for the reservation (Figure 5.82).

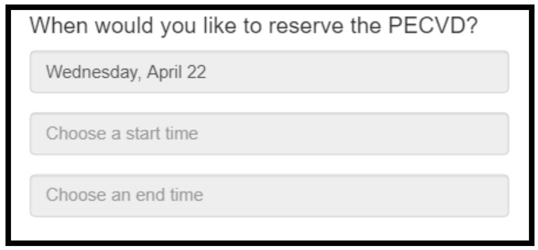


Figure 5.82: *Mobile reservation date and time dialog*

  – If the date needs to be changed, click inside of the date box and a calendar will pop up (Figure 5.83). Select the date of interest. Clicking on the date on the calendar will close the pop up and fill in the new date.

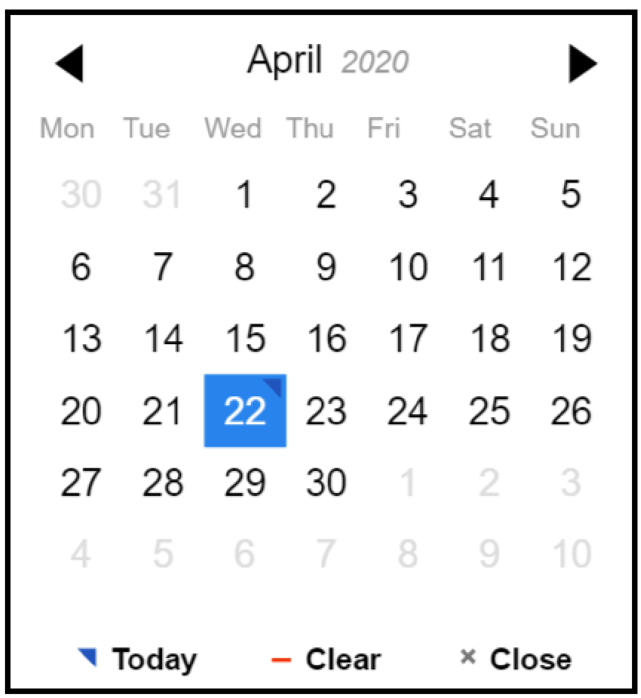


Figure 5.83: *Mobile reservation date dialog*

– Click the choose a start time box and a time wheel will pop up (Figure 5.84). Any times already reserved will be greyed out and noted with ‘already reserved’. Click on the available start time of your choice. The pop up will automatically close and fill in the start time. Repeat for the end time.

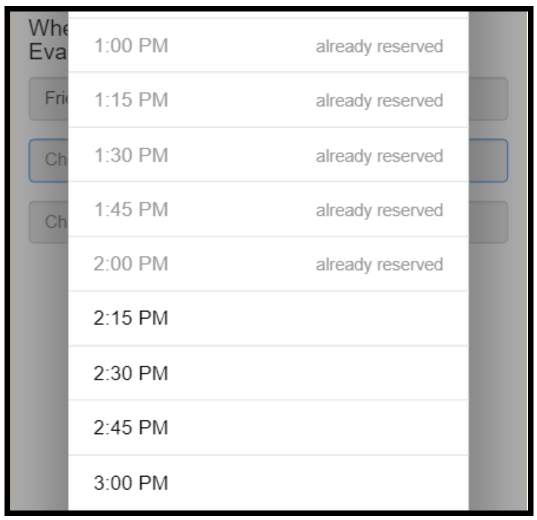


Figure 5.84: *Mobile reservation start time and end time dialog*

- Once all require information is entered, click the create this reservation button (Figure 5.85).

Figure 5.85: *Mobile reservation create button*

- The requested reservation will be tested against the reservations policies. If there is a policy conflict, the user will be prompted with a list of conflicts and the reservation will not be made (Figure 5.86). If an error is encountered click the back to previous page link or return to homepage link to continue.

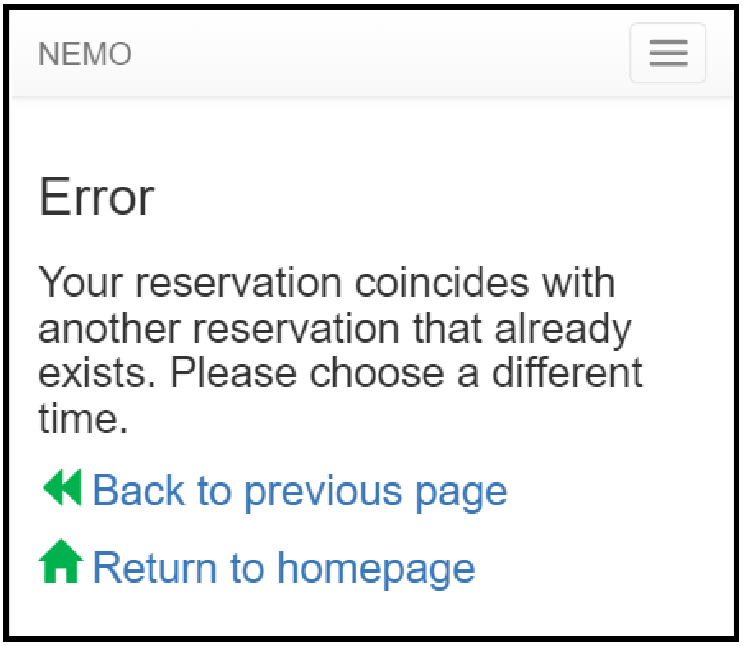


Figure 5.86: *Mobile reservation policy conflict dialog*

- Upon successful creation of the reservation, a confirmation dialog will appear (Figure 5.87). Click the return to homepage link or view the tool calendar link to continue.

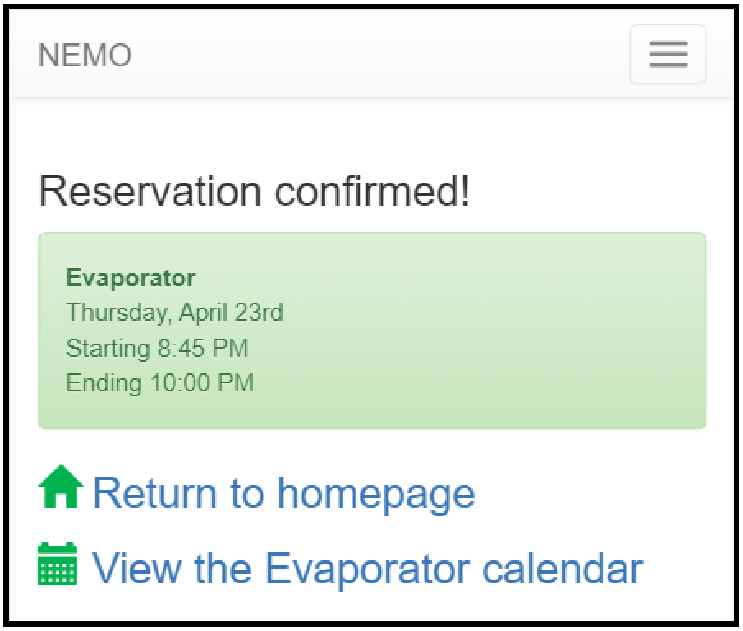


Figure 5.87: *Mobile reservation confirmation dialog*

- The reservation will appear on the calendar.

5.10 Calendar customizations

5.10.1 Notification emails

Several email notifications are possible associated with a reservation and must be configured to be functional.

- Missed reservations email template.

- Reservation reminder email template.
- Reservation warning email template.
- Reservation cancelation email template.
- User reservation creation email template.
- User reservation cancel email template.

All email templates are configured in the Customization page, described in chapter 41.

5.10.2 Calendar view settings

The date format, default view, first day of week, calendar view start time, recurring outages days in advance and overview options can be configured in the Customization → Calendar settings section 41.3.

5.10.3 Calendar view time grid resolution

The time grid resolution is 15 minutes. To change the value, edit the file calendar.html and change the constant in the slotDuration setting.

5.10.4 Reservation policies

The reservation policies are checked in the policy.py file. It is beyond the scope of this manual to discuss how to create a new policy however the policy.py file can be edited to turn off existing policies or change which policies can be bypassed by staff.

5.10.5 Calendar page refresh rate

The calendar page automatically refreshes every 30 seconds which updates the calendar and sidebar. To change the update interval, edit the calendar.html and change the setInterval constant (in milliseconds) in the on_load function.

CHAPTER 6

Tool control

The tool control page is the main interface for finding information about a tool, using a tool, and commenting on or reporting problems with tools. The page features a side bar to quickly navigate between tools and visually determine each tools status; a summary tab to provide tool information, status, and login interface; a details tab to provide information about a tool such as the tool owner, its location, required resources, and task history; and tabs to report problems and post comments.

6.1 Web address

The tool control page is accessible at site-address/tool_control/. For example, www.nemo.com/tool_control/. The page can also be accessed from the navigation bar menu item “Tool control”.

6.2 Side bar

The side bar has a variety of features to help users visually identify tool and training status, as well as convenient navigation (Figure 6.1).

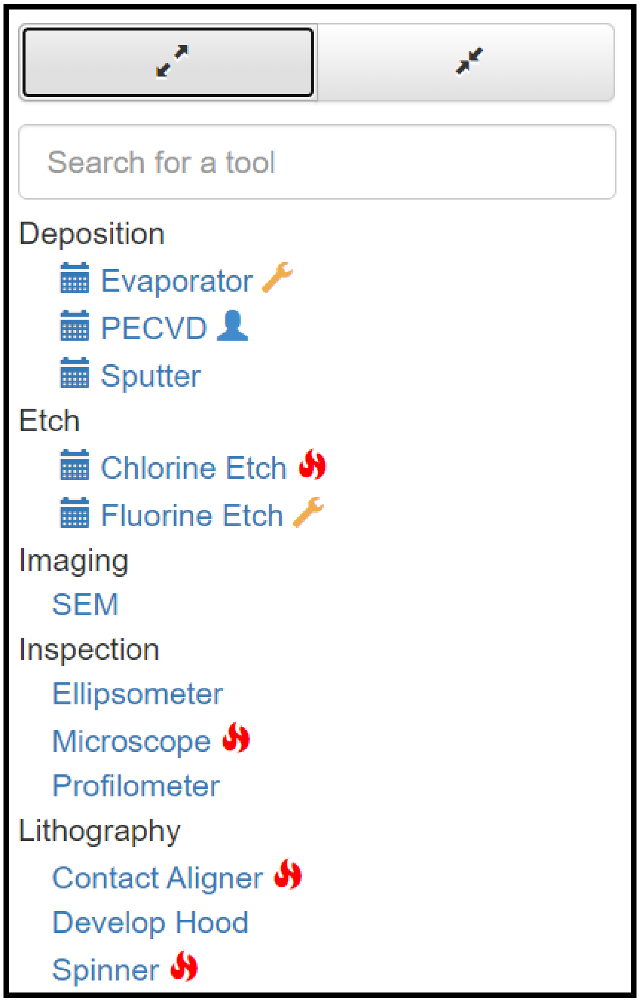


Figure 6.1: *Tool control page side bar*

6.2.1 Find the tool of interest

The expand/contract toggle button (Figure 6.2) provides a shortcut to open or close the tool list.

Figure 6.2: *Expand/contract toggle button*

Clicking the button will fully expand the tool list so all categories, sub-categories, and tools are listed (Figure 6.1).

Clicking the button again will close the tool list so only top categories are listed (Figure 6.3).

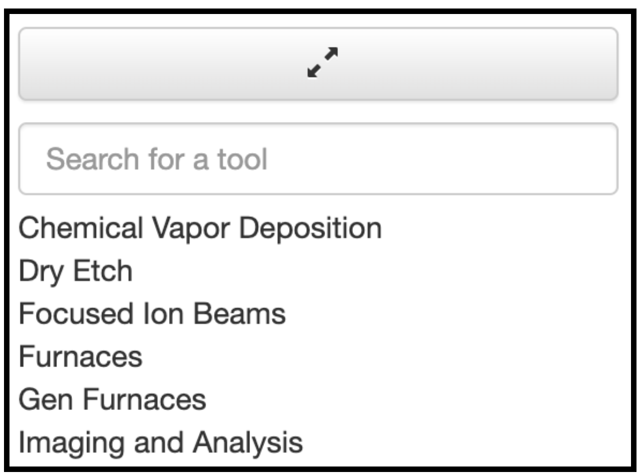


Figure 6.3: *Tool list contracted*

To find a tool directly, enter the name in the search dialog (Figure 6.4) then select the name of the list returned. The return list updates automatically as typed, and a tool can be clicked from the list at any time (Figure 6.5). Once clicked, the tool list is expanded to show the tool clicked and that tool is selected.

Figure 6.4: *Tool search dialog*

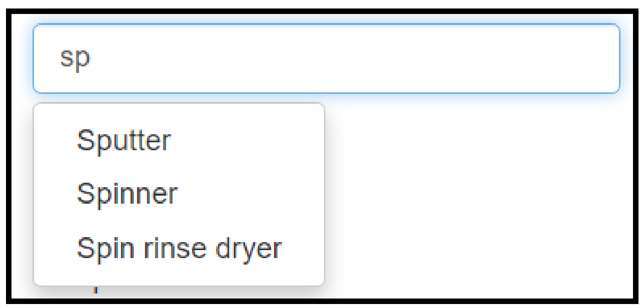


Figure 6.5: *Tool search return list*

6.2.2 Hierarchy of the tool list

The tool list is displayed in alphabetical order by top level category, then by second level category, etc. If both tools and sub-categories exist at any level, tools are listed first in alphabetical order, then sub-categories are listed in alphabetical order (Figure 6.6). All tools must have at least one top level category. Categories are set at the tool level and are discussed in the Detailed administration → Tools section 43.64.

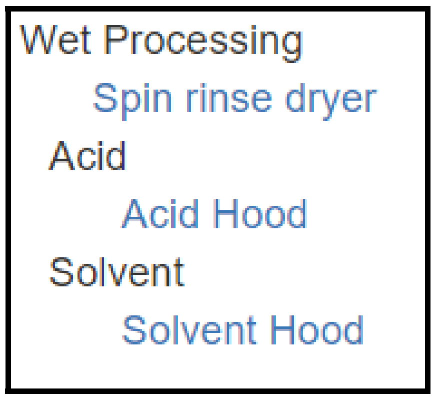


Figure 6.6: *Example of category and tool mixed listing*

6.2.3 Tool list icons

Each tool can list icons to give a quick reference to visually note the operating status. Hovering over an icon will give a description of its purpose in case the icons meaning isn't known.

 The tool requires an area reservation. Before a user can make a reservation on the tool, they must first make an area reservation that will encompass the start time of the tool reservation. Area reservations are optional and configured in the area table discussed in the Detailed administration → Areas section 43.8.

 A user is currently logged into the tool. Hovering over the icon will show the logged in user's name.

 A delayed logoff is in effect. The tool is not available for users.

 A scheduled outage is in effect for this tool. The tool is not available to users.

 A scheduled outage of an option resource is in effect for this tool. The tool is available but may not be fully functional.

 A required resource is unavailable. The tool is not available to users.

 An optional resource is unavailable. The tool is available to users, but the tool may not be fully functional. The optional resource unavailable icon is only displayed if the required resource unavailable icon is not displayed.

 The tool is shut down because of a serious problem. The tool is not available to users.

 The tool has a problem that may impact usage or results. The tool is available to users, but the tool may not be fully functional. The tool problem icon is only displayed if the tool shut down icon is not displayed.

6.2.4 Tool qualification

Tools that users are trained and qualified on will appear dark on the list while tools that a user is not qualified on will appear greyed out (Figure 6.7). If the "Show qualified tools button" setting is enabled from Calendar settings (section 41.3), the user can decide to filter out tools he is not qualified for. User tool qualifications are detailed in the Qualifications chapter 30.

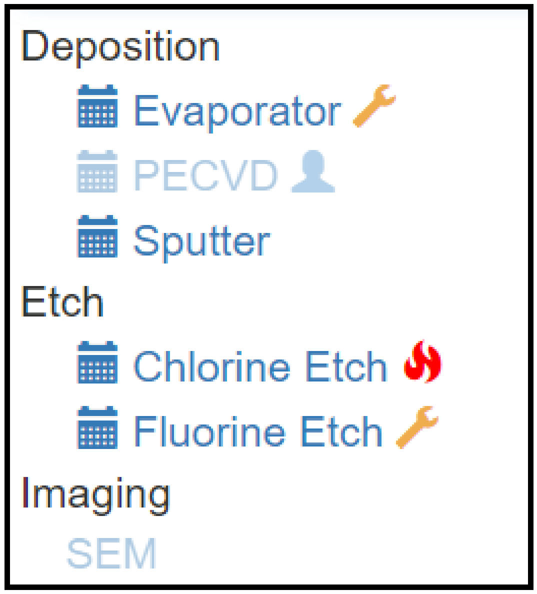


Figure 6.7: *Tool list showing user qualifications*

6.3 Tool page header bar

The tool page header bar shows the currently selected tool selectable tabs used to navigate the tool pages (Figure 6.8). The summary tab is selected by default each time the tool control page is loaded. The Config History tab is only visible on tools that are configurable.

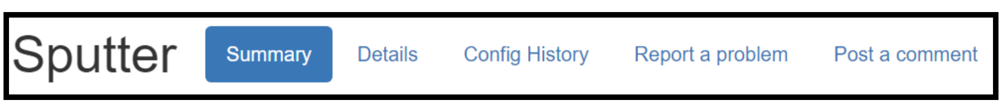


Figure 6.8: *Tool page header bar*

6.4 Summary Tab

The summary tab provides users and staff with operational information such as tool serial number, tool status, rates, tool status details, comments, configuration details, log in options for idle tools, log out options for in use tools, tool description, and tool image (Figure 6.9, Figure 6.10).

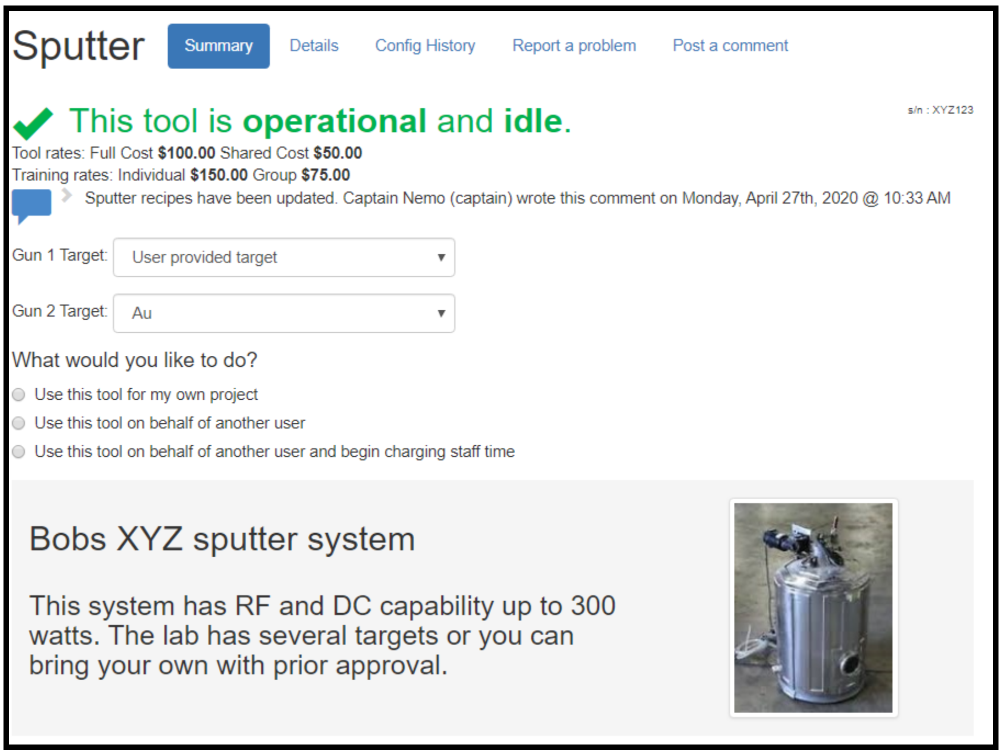


Figure 6.9: *Tool control summary page of idle tool*

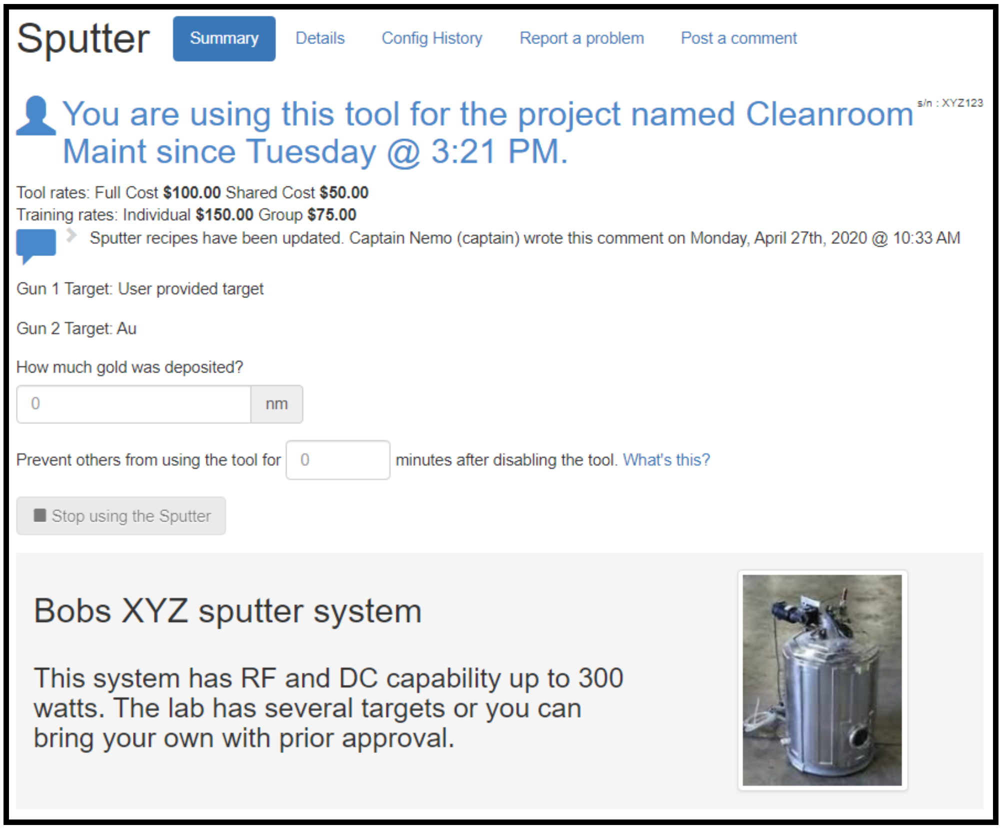


Figure 6.10: *Tool control summary page of tool in use*

6.4.1 Tool serial number

The tool serial number is optional and will only be displayed if a value exists in the tool table. It is displayed in the top right corner of the summary tab (Figure 6.11). Tool serial number configuration is discussed in the Detailed administration → Tools section 43.64.

Figure 6.11: *Tool serial number*

6.4.2 Tool status

The tool status is displayed at the top of the summary tab and informs users and staff of the current condition of the tool. There are several possible statuses, and they are displayed with precedence in the order listed below.

6.4.2.1 Tool in use

The highest priority status is that a tool is in use. The tool in use message will identify the user, project, and the time they started using the tool (Figure 6.12). The user name is a link that can be clicked to contact the user by email through NEMO.

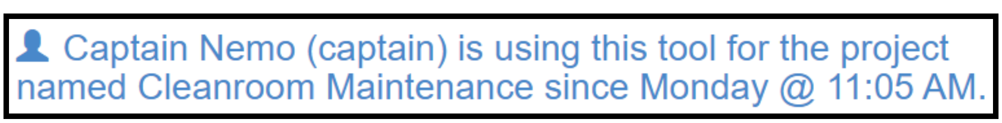


Figure 6.12: *Tool status in use by user message*

If the current user is also the user logged into the tool, the message will be more personalized (Figure 6.13).

Figure 6.13: *Tool status in use by current user message*

If a staff member is using a tool on behalf of another user, both the staff member and user will be listed (Figure 6.14).

Figure 6.14: *Tool status in use by staff on behalf of a user*

In addition, if the current user is using the tool with a reservation, the reservation end time will also be displayed (Figure 6.15).

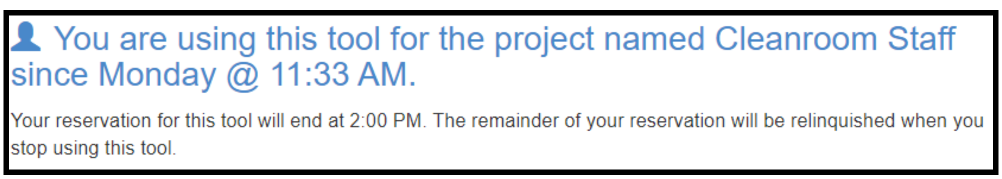


Figure 6.15: *Tool status in use by current user with reservation message*

6.4.2.2 Delayed logoff

The delayed logoff status indicates that the previous user initiated a delayed logoff to prevent usage for some amount of time (Figure 6.16). Users are not able to log in during this time however staff may override and log in. The feature is useful for tools that require post-process runs such as plasma cleans. It allows a user to run the post-process and leave without waiting for the completion. Tool usage time is accumulated during delayed logoff. Delayed logoff configuration is discussed in the Detailed administration → Tools section 43.64.

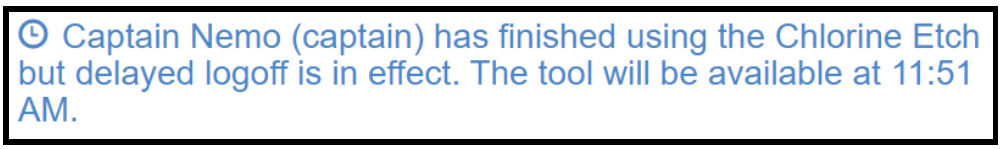


Figure 6.16: *Tool status scheduled tool outage*

6.4.2.3 Scheduled outage

There are two types of scheduled outage: a scheduled tool outage and a scheduled resource outage. If there are multiple scheduled outages, all outages will be displayed sequentially. Both outage types display the reason for the shutdown, details, who initiated the shutdown, the start day and time, and the end day and time. Scheduled outages are planned shutdowns that take a predictable amount of time.

A scheduled tool outage allows staff to automatically shut down a tool on a set date and time which can be useful for scheduling tool configurations or preventative maintenance (Figure 6.17). Users are not able to log in during a scheduled tool outage however staff are. Details about scheduled tool outages can be found in the Calendar page → Reservations → Schedule an outage subsection 5.4.13.

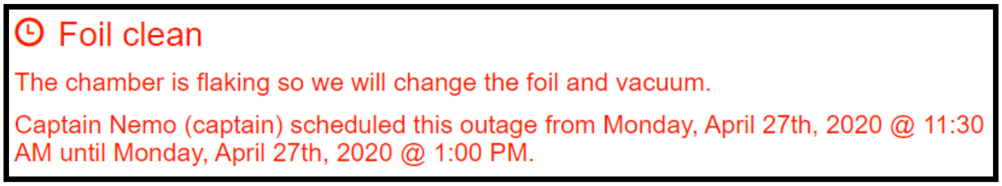


Figure 6.17: *Tool status scheduled tool outage*

A scheduled resource outage allows staff to automatically shut down a resource on a set date and time which can be useful for scheduling gas bottle changes or other facility related maintenance (Figure 6.18). Resource outages will automatically update tool status for each tool that relies on the resource. Users are not able to log in during a scheduled resource outage when the resource is required by the tool however staff are.

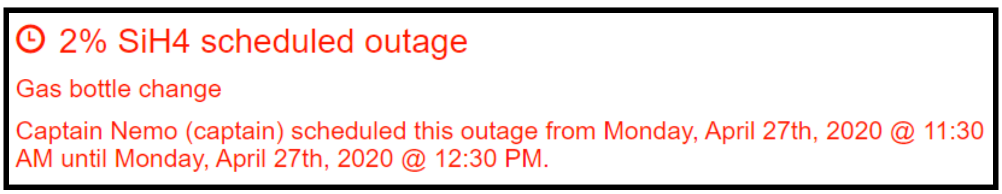


Figure 6.18: *Tool status scheduled required resource outage*

If a scheduled resource is optional on a tool, the scheduled outage will be indicated in yellow, and the tool will still be available to users (Figure 6.19).

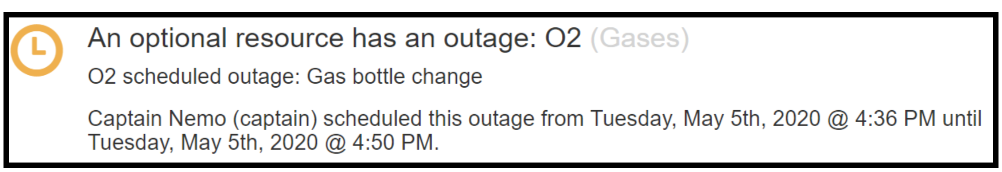


Figure 6.19: *Tool status scheduled optional resource outage*

Details about scheduled resource outages can be found in the Resources chapter 33.

6.4.2.4 Shutdown

The tool shutdown status is displayed if the tool has a problem that requires shut down or a required resource is not available (Figure 6.20). Users are not able to log in during this time however staff are. Details about tool shut downs can be found in the Tool control page → Report a problem tab section 6.8. Details about resources can be found in the Resources chapter 33.

Figure 6.20: *Tool status shut down*

6.4.2.5 Optional resource not available

The optional resource outage status is displayed if there are resources unavailable that a tool partially depends on (Figure 6.21). Users and staff are able to log in. For example, a fluorine reactive ion etch system with multiple types of fluorine gases, and one is not available. Details about resources can be found in the Resources chapter 33. Dependent and optional resource configuration is discussed in the Detailed administration → Tools section 43.64.

Figure 6.21: *Tool status optional resource outage*

6.4.2.6 Operational and idle

The operational and idle status is displayed if there are no issues preventing usage of the tool (Figure 6.22). However, there may be a problem listed in the tool status details below. Users and staff are able to log in.

Figure 6.22: *Tool status operational and idle*

6.4.3 Tool rates

The tool rates are optional and will only be displayed if they have been defined (Figure 6.23). Tool rates are discussed in the Customizations → Tool rates section 41.9.

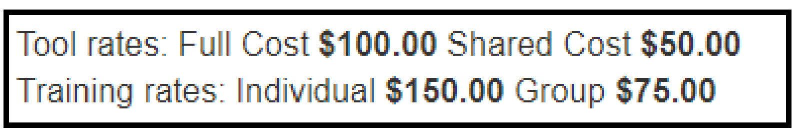


Figure 6.23: *Tool rates*

If a tool has child tools defined to allow multiple modes of operation with different charges, the parent and all child rates will be displayed (Figure 6.24). Parent and child tools are discussed in the Detailed administration → Tools section 43.64.

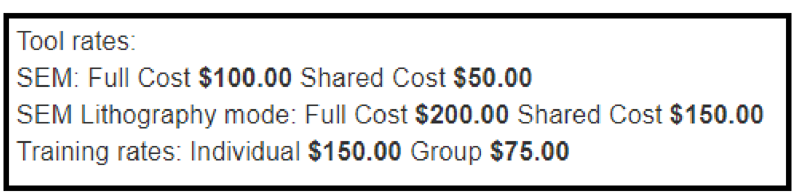


Figure 6.24: *Tool rates with parent and child tools*

6.4.4 Tool usage counters

Tool usage counters, if configured, are displayed below the rates (Figure 6.25). Tool usage counters are linked to numeric or float pre/post usage questions and accumulate value with each tool logout based on the answer to the question. This feature is useful for displaying how much a tool has been used, to track material usage, or to trigger preventative maintenance. Detailed information on how to setup tool usage counters is provided in the Detailed administration → Tool usage counters sections:DetailedAdministrationNemoToolUsageCounters.

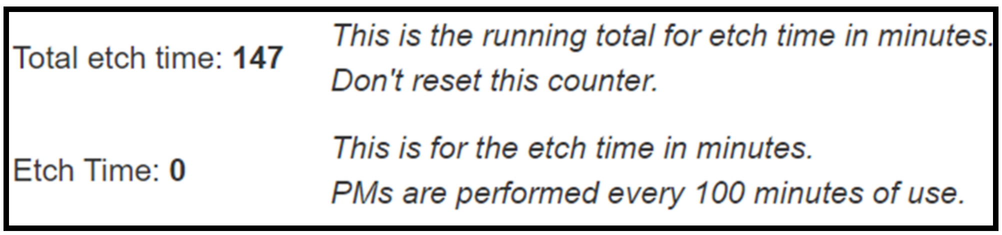


Figure 6.25: *Tool usage counter, user view*

Staff are able to reset the counter and will see a reset button next to the current value (Figure 6.26).

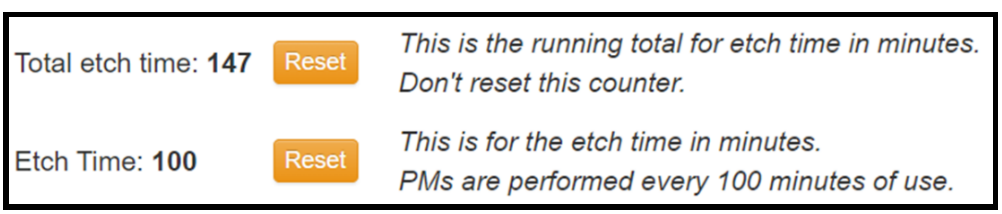


Figure 6.26: *Tool usage counter, staff view*

Clicking reset will open a confirmation dialog box, click ok to reset the counter or cancel to abort (Figure 6.27).

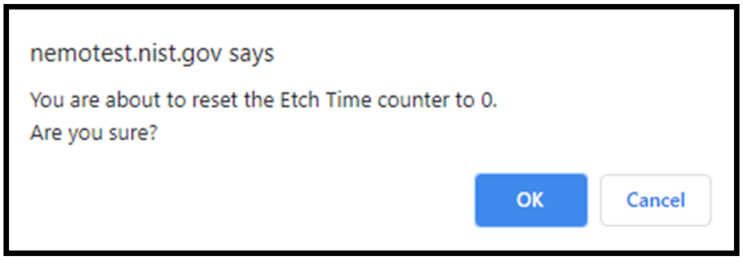


Figure 6.27: *Tool usage counter reset confirmation dialog*

Each time a counter is reset, a comment is posted for the tool that expires after seven days (Figure 6.28). In addition, if the Lab Manager role has been defined in settings.py, an email is sent. The comment and email will list the counter, its last value, who reset it, and when.

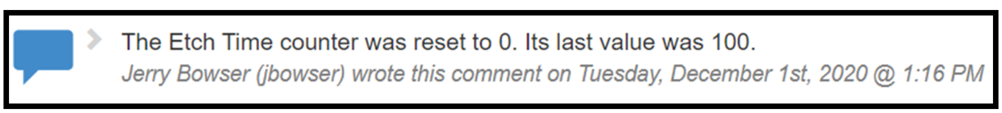


Figure 6.28: *Tool usage counter reset comment*

6.4.5 Tool status details

Tool status details provide additional information about a tool that may impact availability or results. If the information available for a particular dialog is lengthy, only the first two lines are displayed with an expansion icon ›. Click the icon to see more information.

6.4.5.1 Unavailable required resources

When a required resource is not available, the status details will show a red leaf and identify which required resource is not available along with the description that was entered when the resource was shut down (Figure 6.29).

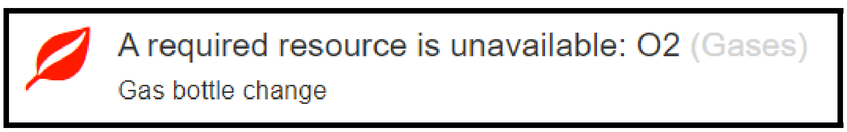


Figure 6.29: *Unavailable required resource*

6.4.5.2 Unavailable optional resources

When an optional resource is not available, the status details will show a yellow leaf and identify which required resource is not available along with the description that was entered when the resource was shut down (Figure 6.30).

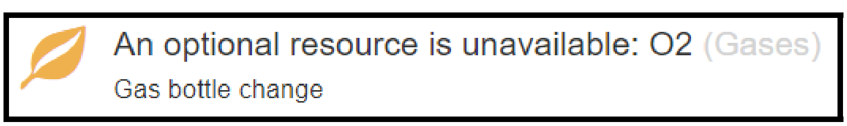


Figure 6.30: *Unavailable optional resource*

6.4.5.3 Shutdown and problem tasks

Shutdowns and problems are reported in the Tool control → Report a problem tab described. The status details functionality are identical for both except for the displayed icon. Shutdowns are displayed with a red fire icon (Figure 6.31) and problems are displayed with a yellow wrench icon (Figure 6.32). When a shutdown or problem is reported, the user can select a category that will be displayed as the heading (Figure 6.31). If no category is selected, the description is displayed as the heading (Figure 6.32).

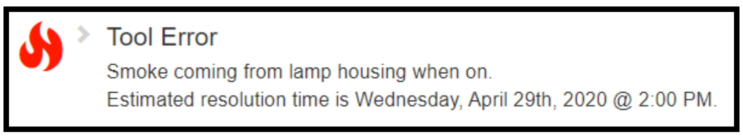


Figure 6.31: *Tool shutdown*

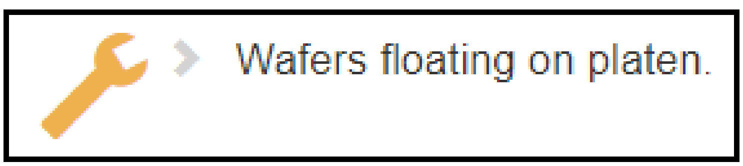


Figure 6.32: *Tool problem*

Clicking the will expand the shutdown and problem dialog (Figure 6.33, Figure 6.34).

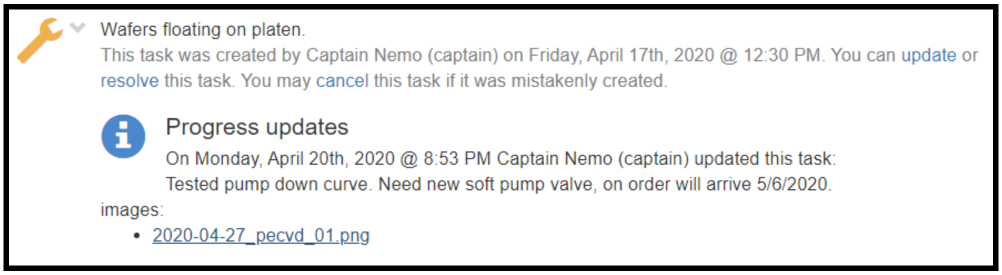


Figure 6.33: *Tool status problem dialog expanded*

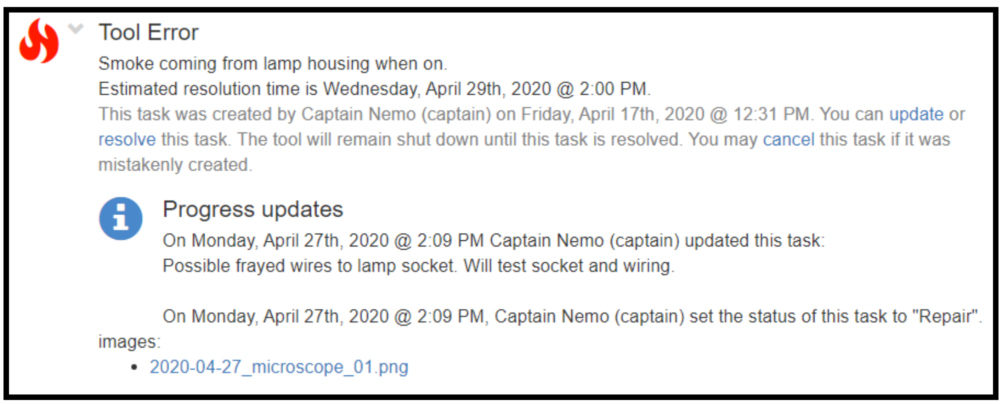


Figure 6.34: *Tool status shutdown dialog expanded*

Staff can update tasks and resolve tasks by following the update or resolve links provided (Figure 6.35).

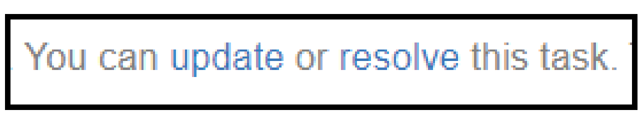


Figure 6.35: *Tool status update and resolve links*

The user that created the task can cancel it by following the link provided (Figure 6.36).

Figure 6.36: *Tool status cancel link*

All updates, new information, and expected resolution times are listed. Links are provided to any images that have been uploaded. Clicking an image link will open the image in a new tab (Figure 6.37).

Figure 6.37: *Tool status image link*

Clicking the will collapse the shutdown or problem dialog.

6.4.5.4 Comments

Comments are created in the Tool control → Post a comment tab section 6.9. They are used to convey important information about a tool to users and can have an automatic expiration or display indefinitely (Figure 6.38).

Figure 6.38: *Tool status comment*

Clicking the will expand the comment dialog (Figure 6.39).

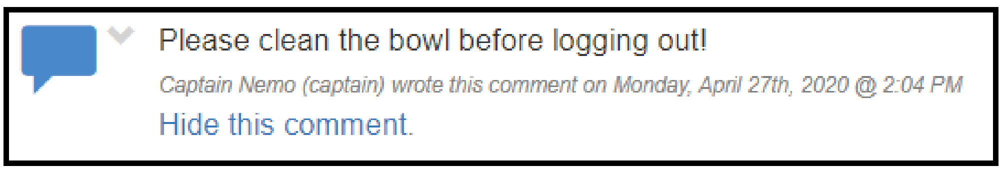


Figure 6.39: *Tool status comment dialog expanded*

Staff or the user that created the comment may hide comments by clicking the hide this comment link (Figure 6.40).

Figure 6.40: *Tool status hide comment link*

Clicking the will collapse the comment dialog.

6.4.5.5 Update task (staff only)

Staff may update a task by clicking the update link on a problem or shutdown listed in the tool status details. Clicking the link will open the task update dialog (Figure 6.41). Many of the fields associated with the original task report are available to be edited. In addition, a summary of activity to date is listed on the right side of the page. However, if the page is too narrow or in mobile view, all information is listed in a single column. All fields are optional for updates. Only fields with changes are updated.

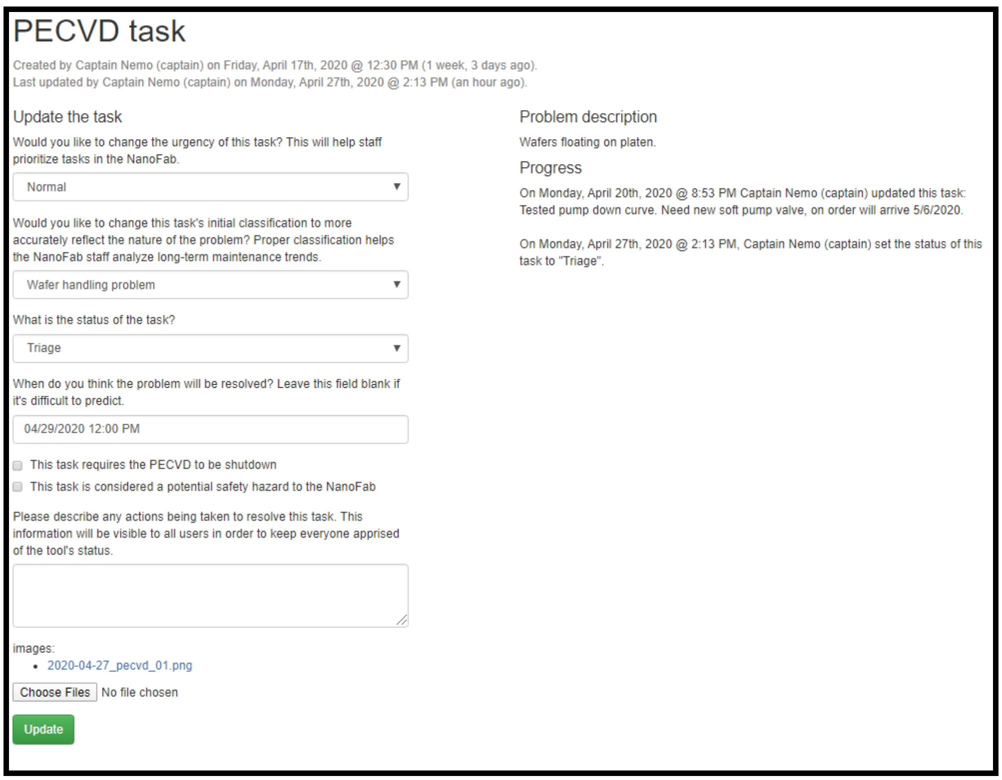


Figure 6.41: *Tool control task update dialog*

- The urgency of the task can be changed by selecting a new urgency from the drop down (Figure 6.42). The urgency is displayed on the maintenance screen detailed in the Maintenance chapter 29.

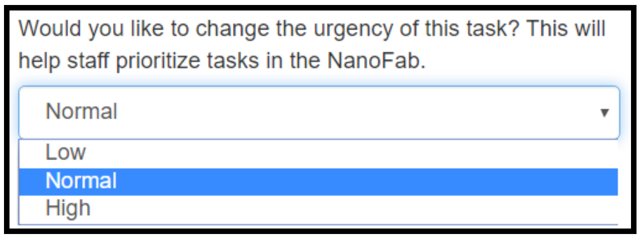


Figure 6.42: *Tool control task update urgency*

- If task categories have been defined, a dropdown and instruction will appear. Click the dropdown and select the problem category that best describes the problem (Figure 6.43). If no category describes the problem, leave this blank. Task categories can be used to bin problems making future problem analysis easier. Categories are configured in the Detailed administration → Task categories section 43.56.

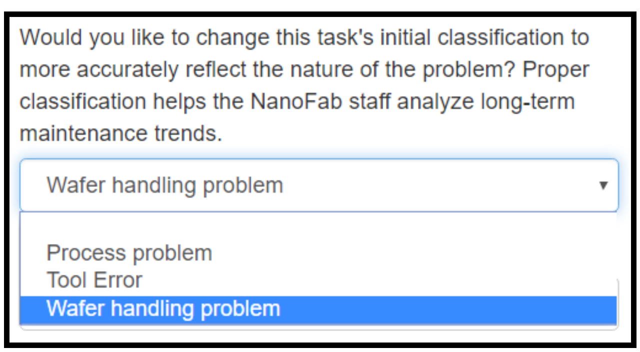


Figure 6.43: *Tool control task update category*

- If task statuses have been defined, a dropdown and instruction will appear (Figure 6.44). If the status is not known, the field can be left blank. Click the dropdown and select the new status for the problem. Task statuses are used to update various staff as a problem progresses to resolution. For example, once the maintenance team has finished a repair, they can change the status to qualification which notifies the process engineer that the tool is ready to requalify. Statuses are configured in the Detailed administration → Task statuses page section 43.57.

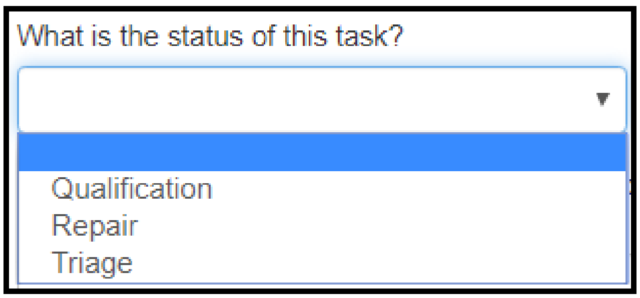


Figure 6.44: *Tool control task update status*

- Provide an estimate of when the problem will be resolved if known or leave blank. Clicking in the dialog will open a date and time dialog (Figure 6.45).

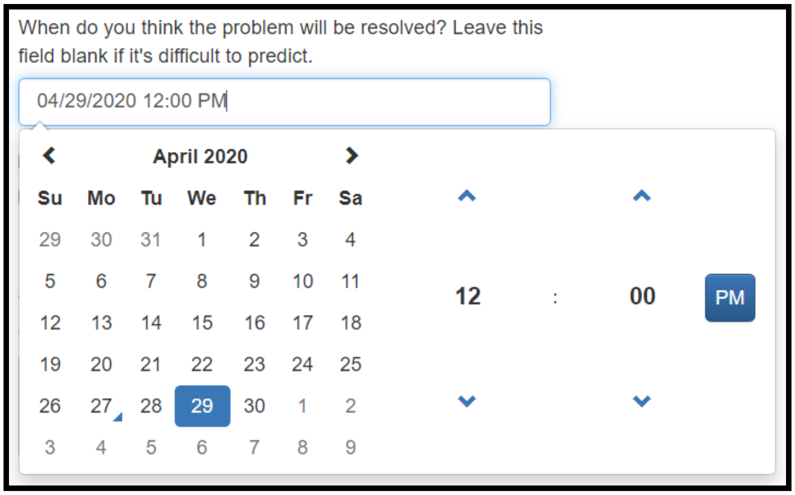


Figure 6.45: *Tool control task update completion date*

- Check if the shutdown check box if the tool is not able to be used by others and could potentially ruin samples (Figure 6.46).

Figure 6.46: *Tool control task update safety hazard*

- Check the safety hazard check box if the problem is a safety hazard to people or equipment (Figure 6.47).

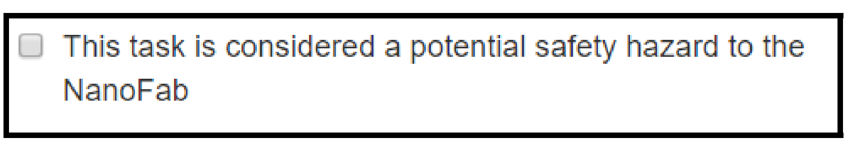


Figure 6.47: *Tool control task update shut down*

- Provide a detailed update in the dialog box (Figure 6.48).

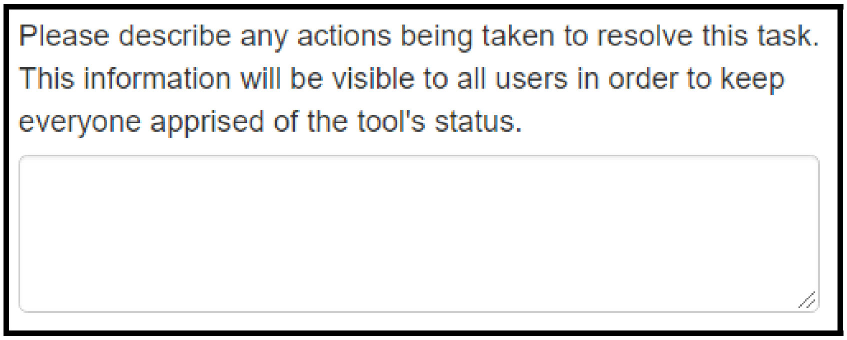


Figure 6.48: *Tool control task update detailed description*

- The choose files dialog may be used to upload any relevant pictures to show details that support the description (Figure 6.49). Clicking the button activates a standard file selection dialog. Multiple files can be uploaded. Note: it is good practice to make note of the files in the description to link the file to the text.

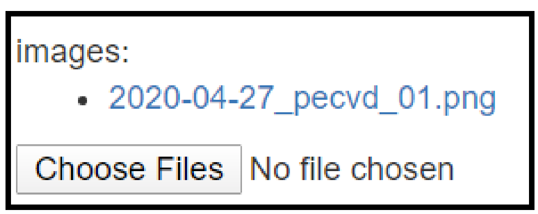


Figure 6.49: *Tool control task update upload files*

- Click the update button to finish (Figure 6.50). To cancel an update, navigate to another page prior to clicking the update button.

Figure 6.50: *Tool control task update button*

6.4.5.6 Resolve task (staff only)

Staff may resolve a task by clicking the resolve link on a problem or shutdown listed in the tool status details. Clicking the link will open the task resolution dialog (Figure 6.51). A resolution description and resolution category can be entered. In addition, a summary of activity to date is listed on the right side of the page. However, if the page is too narrow or in mobile view, all information is listed in a single column. All fields are optional.

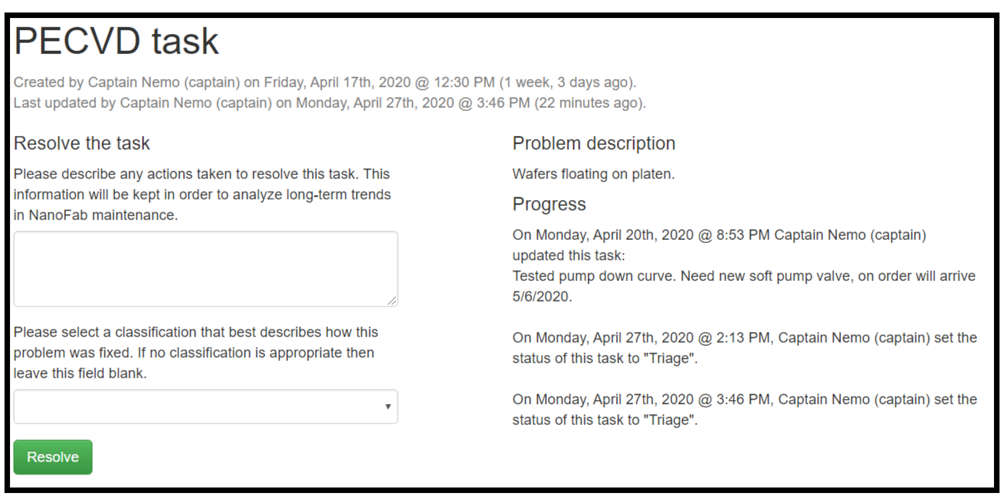


Figure 6.51: *Tool control task resolution dialog*

- Provide a detailed resolution description in the dialog box (Figure 6.52).

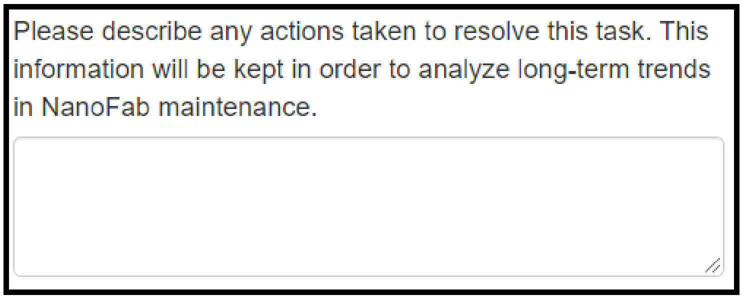


Figure 6.52: *Tool control task resolution description*

- If task categories have been defined, a dropdown and instruction will appear. Click the dropdown and select the problem category that best describes the problem (Figure 6.53). If no category describes the problem, leave this blank. Task categories can be used to bin problems making future problem analysis easier. Categories are configured in the Detailed administration → Task categories section 43.56.

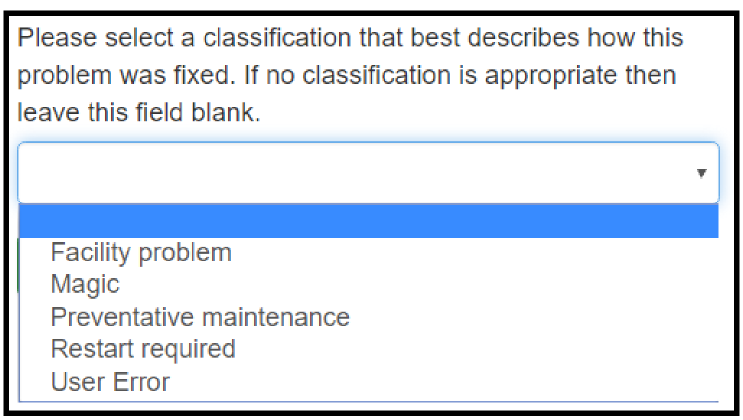


Figure 6.53: *Tool control task resolution category*

- Click the resolve button to finish (Figure 6.54). To cancel an update, navigate to another page prior to clicking the update button.

Figure 6.54: *Tool control task resolution button*

6.4.5.7 Cancel task

The user who created a problem or shutdown may cancel the task by clicking the cancel link in the tool status details (Figure 6.55).

Figure 6.55: *Tool control task cancel task link*

There are no additional prompts, clicking the link immediately cancels the task and returns the user to the tool control summary page.

6.4.5.8 Hide comments

Staff or the user who created a comment may hide the comment by clicking the 'hide this comment' link in the comment details (Figure 6.56).

Figure 6.56: *Tool control task hide comment link*

There are no additional prompts, clicking the link immediately hides the comment and returns the user to the tool control summary page.

6.4.6 Tool configuration

Tool configurations are created in the Configurations table of the database detailed in the Detailed administration → Configurations section. If a tool is configurable, its current configuration will be shown (Figure 6.57).

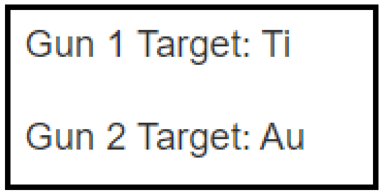


Figure 6.57: *Tool control tool configuration*

If the tool is not in use and the current user is a staff member or has permission to change a tool configuration, a drop down with all possible configurations will be shown (Figure 6.58). Select the desired configuration from the drop down.

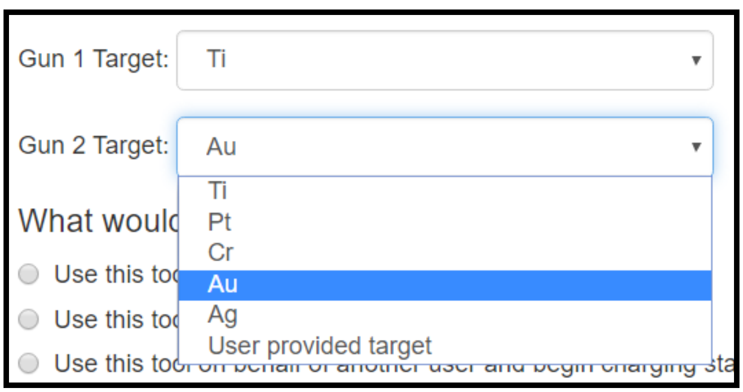


Figure 6.58: *Tool control tool configuration dialog*

Configuration history is saved in the database and is discussed in Detailed administration → Configuration histories section 43.15. Configurations are discussed in the Configuration Agenda chapter 26.

6.4.7 Pre/Post usage questions

If pre/post usage questions are configured and set as required, they must be answered before tool log in/out will be allowed (Figure 6.59). Questions can be multiple choice, text, or numeric input. They can be used to collect information about a run, create charges for consumables used, and record important tool parameters. Pre/Post usage questions can be configured so responses are either required or optional. In addition, questions can be grouped and repeated a configurable number of times to capture multiple processes in a single tool usage. Pre/Post usage questions are discussed in the Detailed administration → Tools section 43.64.

Figure 6.59: *Tool control pre/post usage questions*

All pre/post usage question responses are saved in the database usage events table described in the Detailed administration → Usage events section 43.66. Pre/Post usage question responses can also be reviewed on the usage data history tab of the tool control page. The ability to review the pre/post usage question responses provides an electronic logbook that can be viewed by users and staff.

6.4.8 Tool log in

The tool log in dialogs will vary depending on the user type (staff or not), the operation mode of the tool (regular/waitlist/hybrid) and number of projects the user has.

6.4.8.1 Tool operation mode

The tool operation mode can be set in the tool configuration page in the Detailed administration → Tools section 43.64.
Waitlist timeout and hybrid buffer time can be changed in Customization → Tool section 41.14.5.

There are 3 modes available: Regular, Waitlist and Hybrid:

- Regular: This is the default and normal mode of operation where users can make reservations, and separately engage tools when no one else is using them.
- Waitlist: In this mode, users cannot make reservations, but they can still engage a tool as long as no one else is using it. If someone else is using it, they can add their name to the waitlist and they will be notified when the tool is free to use when it's their turn (Figure 6.60).

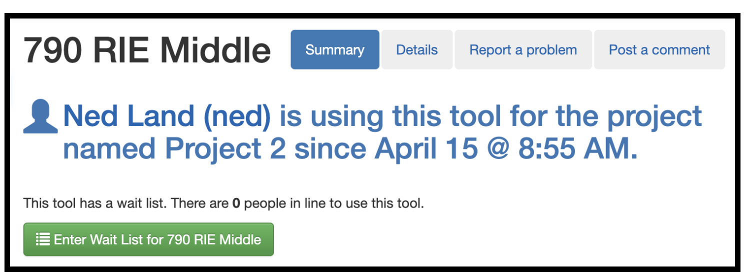


Figure 6.60: *Tool control login enter waitlist*

If it's a user's turn and they do not engage the tool within a certain (configurable) time, they lose their spot and it goes to the next person in the list. Just like in regular mode, users can at any point skip the waitlist to engage the tool if no one else is using it, even if it's not their turn (Figure 6.61).

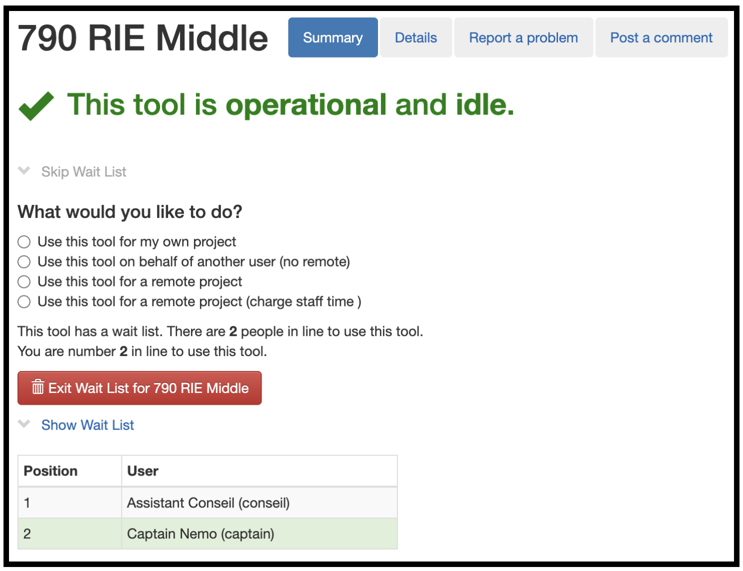


Figure 6.61: *Tool control login skip waitlist*

- Hybrid: This mode is similar to the waitlist mode, except that users can make reservations which will take precedence over the waitlist. Once the user is done using the tool, the waitlist process resumes. When a user is done using a tool, there is a (configurable) buffer time that if a reservation is upcoming during that time, then the next waitlist user will not be notified.

6.4.8.2 User tool login

Users must be explicitly qualified to use tools. In addition, the tool must be in a usable tool status. Users with multiple projects will be prompted to select a project from their list of active projects (Figure 6.62). User qualifications are detailed in the Qualifications chapter 30.

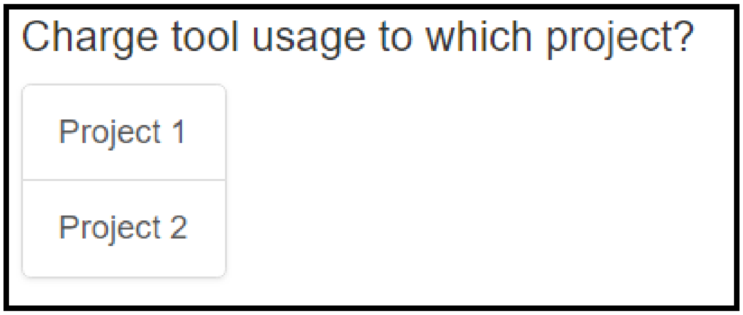


Figure 6.62: *Tool control login project selection*

Clicking the project will enable the start button (Figure 6.63).

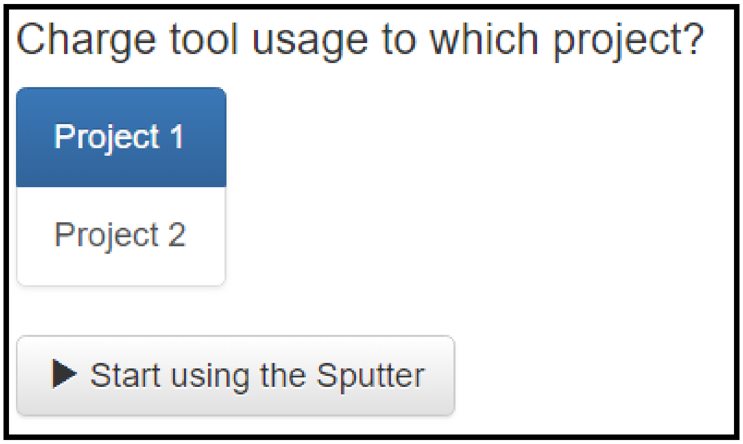


Figure 6.63: *Tool control login multiple project start button*

If a user only has one project, a message with the name of their project will appear and the start button will be displayed (Figure 6.64).

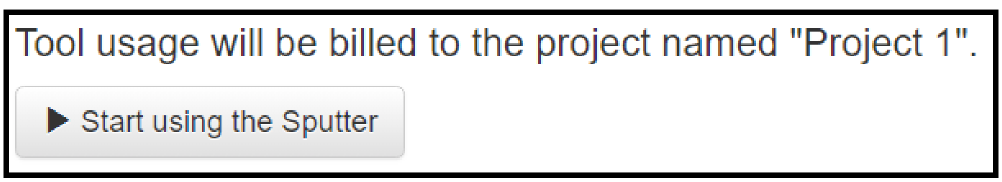


Figure 6.64: *Tool control login single project start button*

Click the ‘Start using the tool’ button to begin usage. NEMO will check user permissions before enabling the tool. If interlocks have been configured, NEMO will enable the interlock. Tool interlocks are discussed in the Detailed administration $\rightarrow$ Tools section 43.64. A start record will be recorded in the usage events table listing the users, project, tool, and start time. Usage events are found in the Detailed administration $\rightarrow$ Usage events section 43.66.

If a tool requires a user to be logged into an area and they are not, an error message will appear (Figure 6.65). Lab areas are configured through the Detailed administration → Areas page section 43.8. Tools can be configured to require a user to be logged into an area and are discussed in the Detailed administration → Tools section 43.64. If a tool requires a user to be logged into an area to use a tool and they attempt to enable the tool without being logged into the area, an unauthorized tool access email will be sent to the abuse email if configured. Both are configured in the Customization chapter 41.

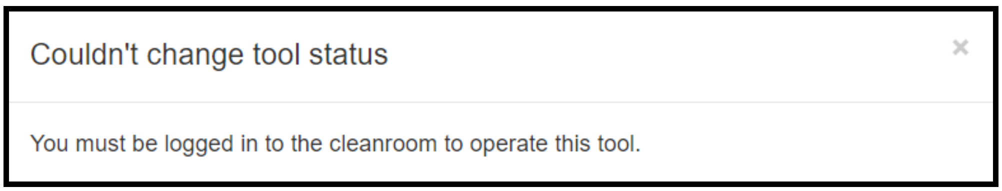


Figure 6.65: *Tool control log in area error message*

If the user isn't qualified to use the tool, an error message will appear (Figure 6.66).

Figure 6.66: *Tool control log in qualification error message*

If interlocks are enabled and the interlock command fails, an error message will appear (Figure 6.67). You can choose to Enable the tool anyway (if that option is checked), try again or cancel.

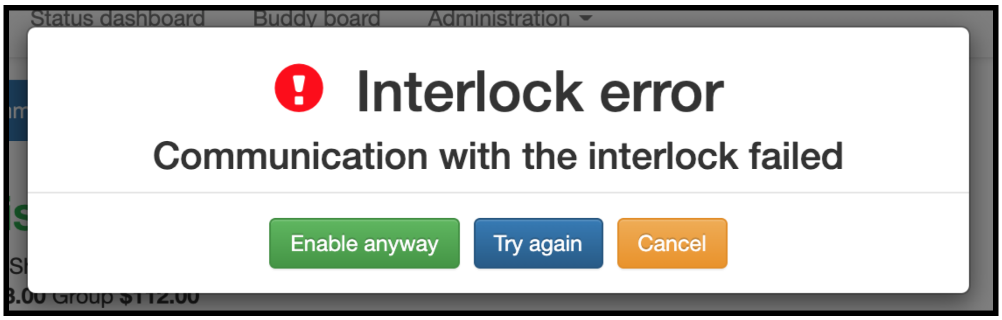


Figure 6.67: *Tool control interlock error*

6.4.8.3 Multiple use tool login

If a tool has been configured for multiple uses as a parent tool with child tools then multiple start buttons will be displayed (Figure 6.68). The parent/child tool configuration is useful in cases where a single tool can be used multiple ways and either the usage of each way needs to be tracked or needs to be charged different rates.

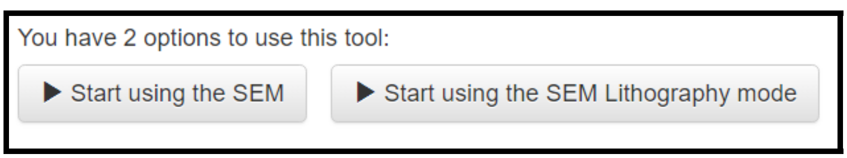


Figure 6.68: *Tool control multiple use tool log in buttons*

Parent and child tools are discussed in the Detailed administration → Tools section 43.64.

6.4.8.4 Staff tool login

Staff have the option to use tools for their own projects or to perform work for other users (Figure 6.69). Select the appropriate usage type to continue.

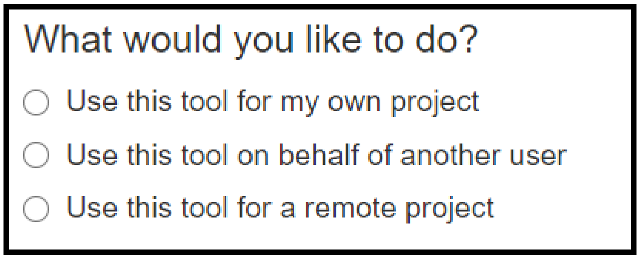


Figure 6.69: *Tool control login staff*

Selecting 'Use this tool for my own project' will proceed the same as a user tool login detailed above. Staff can enable any tool regardless of qualifications and therefore do not need to be explicitly qualified on a tool. If a staff member is already charging staff time to a user, that option will be greyed out.

6.4.8.5 Staff tool login on behalf of another user

If Staff select to use a tool on behalf of another user, a search dialog will appear (Figure 6.70). Enter the users name. As the name is typed, a list of possible users will appear under the dialog. Select the user from the list at any time.

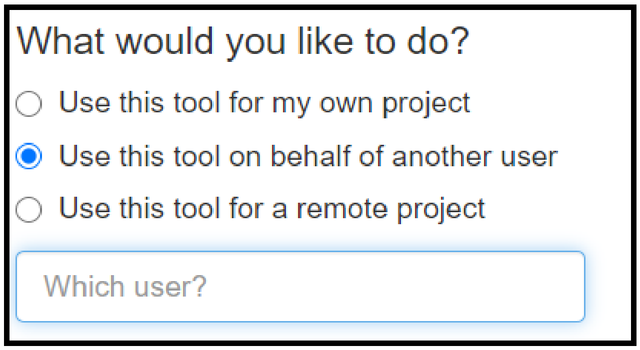


Figure 6.70: *Tool control login on behalf of user*

Once a user is selected, a list of the user's projects will appear if they have more than one (Figure 6.71).

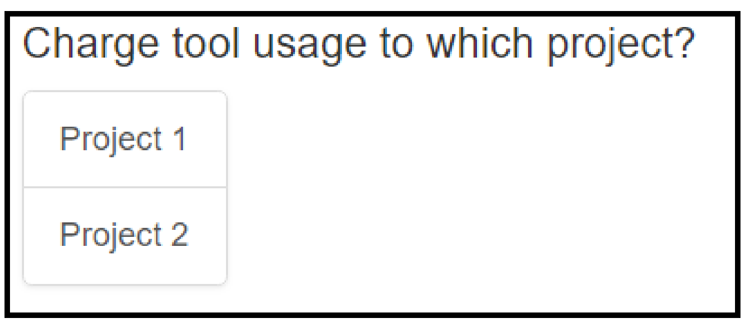


Figure 6.71: *Tool control staff login select project*

Clicking the project will enable the start button (Figure 6.72).

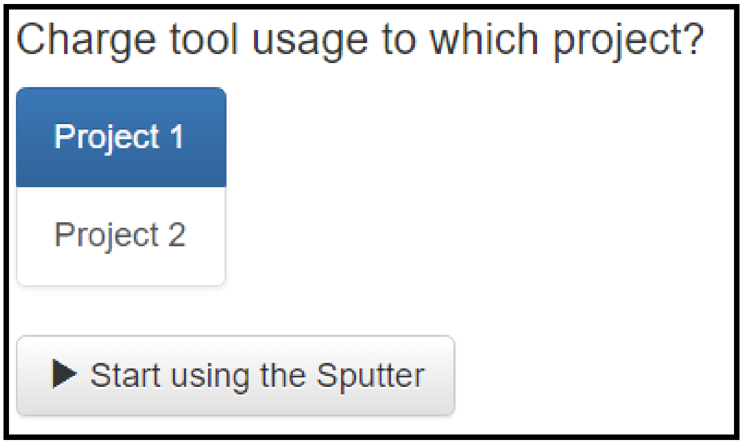


Figure 6.72: *Tool control staff login multiple project start button*

If a user only has one project, a message with the name of their project will appear and the start button will be displayed (Figure 6.73).

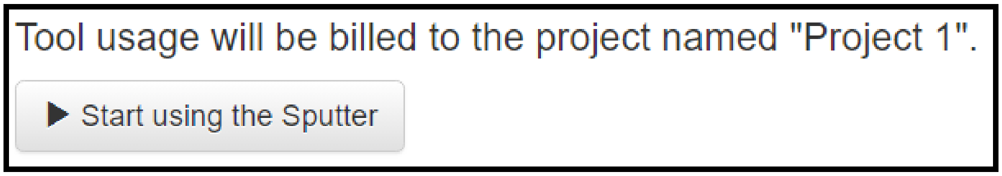


Figure 6.73: *Tool control staff login single project start button*

Click the ‘Start using the tool’ button to begin usage. NEMO will enable the tool and record usage for the selected user regardless of user qualifications on the tool. If interlocks have been configured, NEMO will enable the interlock. Tool interlocks are discussed in the Detailed administration → Tools section 43.64.

If using the tool for a remote project, the charging staff time indicator will appear on the navigation bar (Figure 6.74). If the tool in use is in an area, area access time will also be recorded. Staff charges are discussed in the Staff charges section.

Figure 6.74: *Tool control staff charging time*

6.4.9 Tool log out

The tool log out dialogs will vary depending on the options configured.

6.4.9.1 Delayed log out

If delayed log out has been enable for the tool, the user has the option to log out while preventing usage until the delayed log out time has elapsed (Figure 6.75). Enter the number of minutes to delay or leave blank to skip the delay. This feature is useful for tools that require timed conditioning runs such as etch systems. It allows the user to start the post conditioning run, log out, and leave the area while the run completes.

Figure 6.75: *Tool control log out delayed log out*

Delayed log out configuration is discussed in the Detailed administration → Tools section 43.64.

6.4.9.2 Stop using a tool

If a required post usage question has not been answered, the 'Stop using the tool' button will be disabled (Figure 6.76).

Figure 6.76: *Tool control log out button disabled*

Once all required post usage questions have been answered, the 'Stop using the tool' button will be enabled (Figure 6.77).

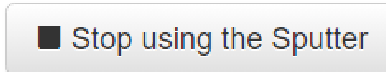


Figure 6.77: *Tool control log out button enabled*

Click the button to stop using the tool.

NEMO will disable the tool and stop recording usage. The usage record in the database will be updated with the end time. Usage events are found on the Detailed administration → Usage events page in section 43.66.

If interlocks have been configured, NEMO will disable the interlock immediately even if delayed log out have been selected. Tool interlocks are discussed in the Detailed administration → Tools section 43.64.

Staff only – If using the tool on behalf of another user and charging staff time, a dialog will pop up asking if staff time charges should continue (Figure 6.78). Click the appropriate button to continue or stop charging staff time. Staff charges are discussed in the Staff charges section.

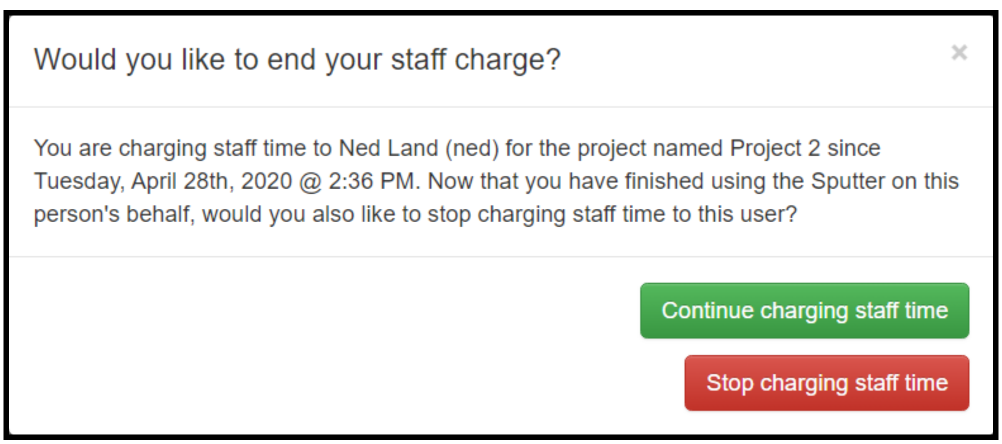


Figure 6.78: *Tool control log out staff charges*

6.4.10 Tool description

The bottom of the tool summary page can be configured to display a description (Figure 6.79).

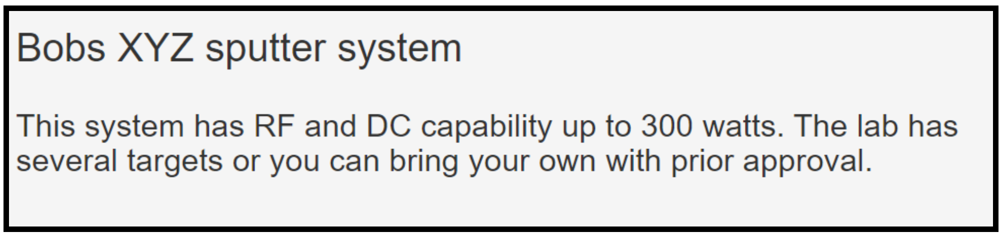


Figure 6.79: *Tool control example tool description*

The description is optional and html coding can be used to control appearance. Tool descriptions are discussed in the Detailed administration → Tools section 43.64.

6.4.11 Tool image

A tool image can be configured to display at the bottom of the tool summary page (Figure 6.80). If a tool description is configured, the image will be displayed next to the tool description.

Figure 6.80: *Tool control example tool image*

The image is optional. Tool images are discussed in the Detailed administration → Tools section 43.64.

6.4.12 Tool Documents

Tool documents can be added and displayed at the bottom of the summary page. They are displayed in reverse order of date uploaded (Figure 6.81).

Figure 6.81: *Tool control example tool documents*

The documents are optional. Tool documents are discussed in the Detailed administration → Tools section 43.64.

6.5 Details Tab

The details tab provides users and staff with information about the selected tool including the responsible staff, tool location, tool credentials, qualified users, required and optional resources, and task and comment history (Figure 6.82).

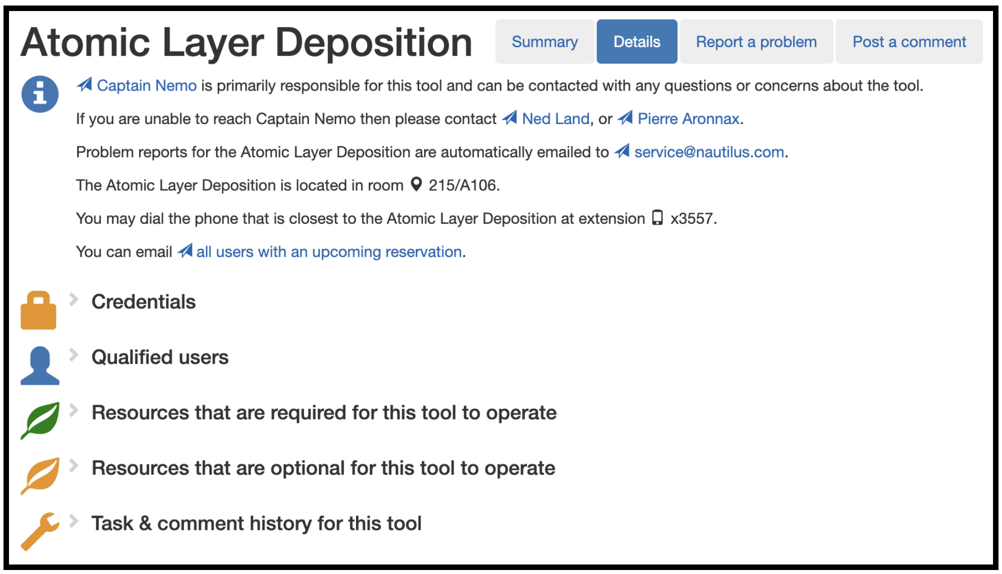


Figure 6.82: *Tool control details page*

6.5.1 Force user off of tool (staff only)

At the top of the page, staff are provided a quick link to for the currently logged in user off of the currently selected tool (Figure 6.83). Clicking the link will log the current user out of the tool and return the view to the summary tab. If there are required post usage questions, an email will be sent to the user, the staff member who forced him off, the tool owner and backup owners, as well as the lab managers. The email will contain the required questions and the tool usage data entry will be blank for usage.

Figure 6.83: *Tool details force user off of tool*

6.5.2 Tool information

The tool information section of the details tab provides primary and back up staff contacts, problem report email, tool location, and tool location phone number (Figure 6.84).

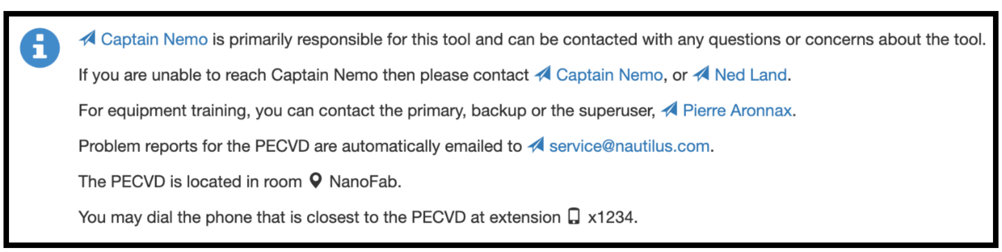


Figure 6.84: *Tool details tool information*

- Primary tool owners are required. If the primary tool owner is associated with a contact, clicking on the arrow next to the primary tool owners name will display additional contact information (Figure 6.85).

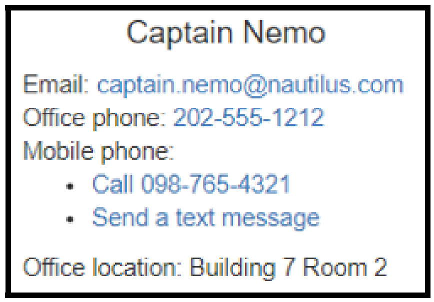


Figure 6.85: *Tool details additional information*

- Backup tool owners are optional and will only display if configured. If the backup tool owners are associated with a contact, clicking on the arrow next to the backup tool owners name will display additional contact information in the same manner for primary tool owners.

- Tool superusers are optional and will only display if configured. If the superusers are associated with a contact, clicking on the arrow next to the superuser name will display additional contact information in the same manner for primary tool owners.

- Associating primary, backup tool owners and superusers with contacts is discussed in the Detailed administration → Contact information section 43.20.

- Problem reporting emails are optional and will only display if configured.

- Tool location is required.

- Tool phone number is required.

All tool information fields are set at the tool level and are discussed in the Detailed administration → Tools section 43.64.

6.5.2.1 Emailing tool contacts through NEMO

Clicking on a tool contact link will open the email dialog (Figure 6.86).

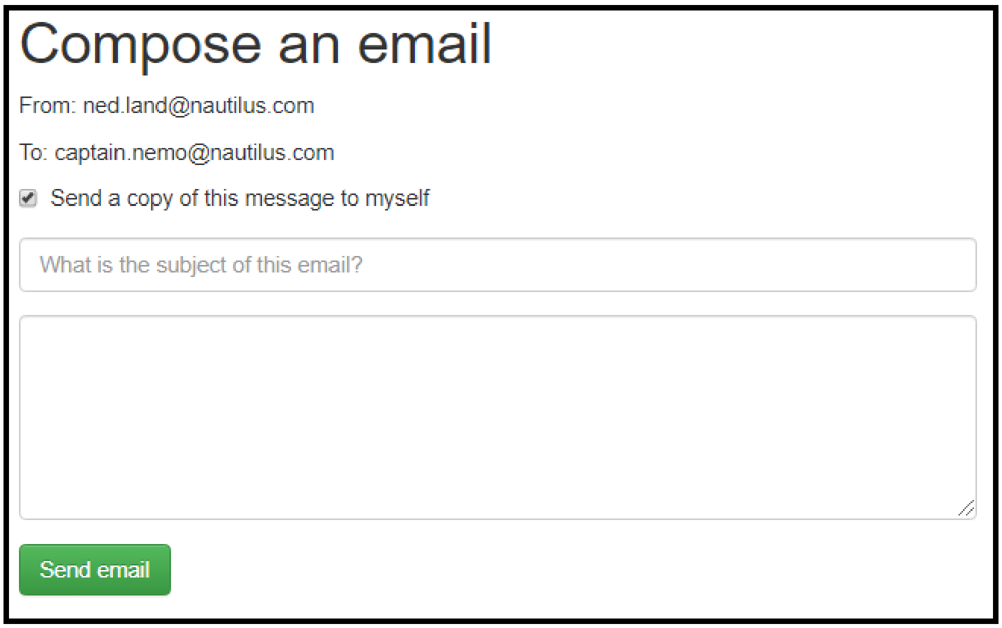


Figure 6.86: *Tool control detail email dialog*

To send an email:

- The from and to fields are automatically set and cannot be changed (Figure 6.87).

Figure 6.87: *Tool control detail email address*

- Set the send a copy checkbox (Figure 6.88). By default, the user will be copied however, the checkbox can be unchecked if desired.

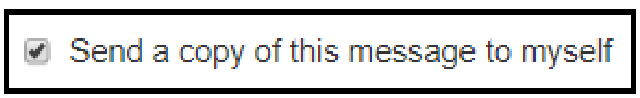


Figure 6.88: *Tool control detail email copy*

- Enter a subject line in the subject dialog box (Figure 6.89).

Figure 6.89: *Tool control email subject*

- Enter the message in the message dialog box (Figure 6.90).

Figure 6.90: *Tool control email message*

- Click ‘Send email’ button to send the message (Figure 6.91).

Figure 6.91: *Tool control email send button*

6.5.3 Credentials

Only staff are able to see credentials here, as long as the option is set in Tool Customization section 41.14.4 (Figure 6.92).

Figure 6.92: *Tool control details credentials*

Clicking the will expand the credentials dialog (Figure 6.93). All credentials the staff member is allowed to see for this tool will be displayed. Tool credentials are discussed in the Tool credentials chapter 36.

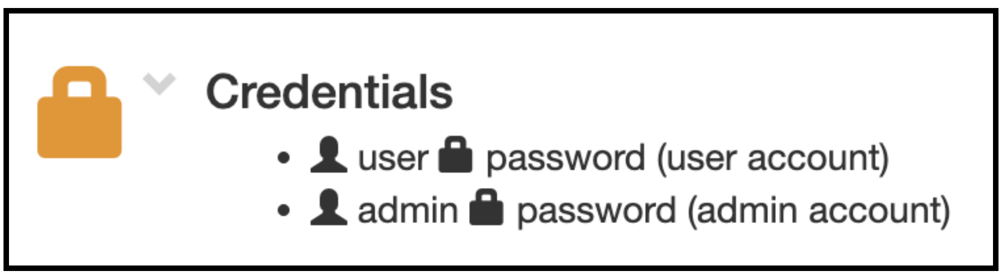


Figure 6.93: *Tool control details credentials expanded*

Clicking the will collapse the tool credentials dialog.

6.5.4 Qualified users

Only staff are able to qualify users, but tool superusers (and regular users if the option is set in Tool Customization section 41.14.4) can see the list of all qualified users on a tool (Figure 6.94).

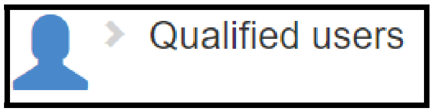


Figure 6.94: *Tool control details qualified users*

Clicking the › will expand the qualified users' dialog (Figure 6.95). All qualified users are listed and there are dialogs to add qualified users and email all qualified users. If qualifying a user will automatically grant them access to the lab, it will be indicated in red. Active users are displayed boldly, and inactive users are greyed out. NEMO user creation and user status is discussed in the Users chapter 39.

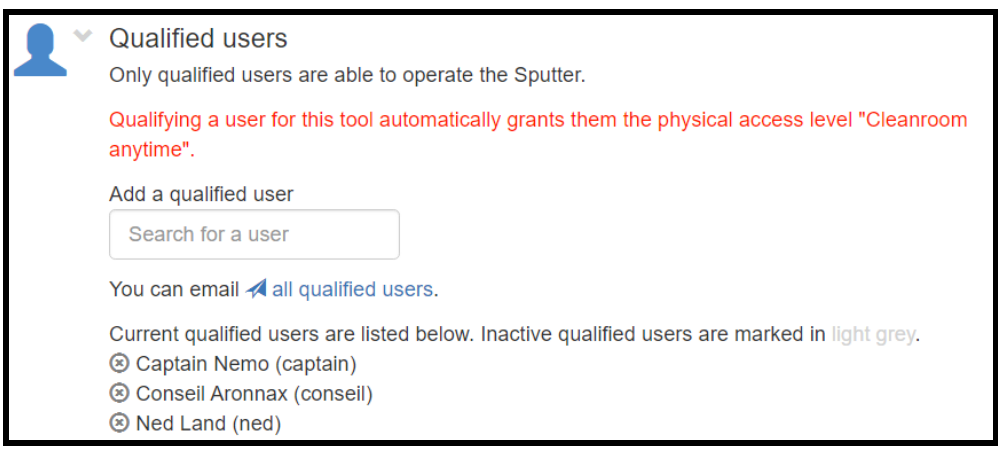


Figure 6.95: *Tool control details qualified users expanded*

Clicking the ⌄ will collapse the qualified user dialog.

6.5.4.1 Qualify a user

Users can be qualified directly using the Add a qualified user search dialog (Figure 6.96). User tool qualifications are detailed in the Qualifications section.

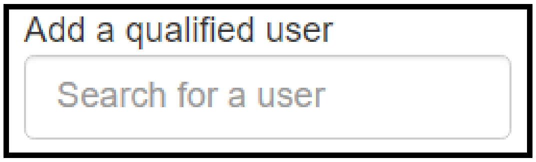


Figure 6.96: *Tool control details qualify a user*

Start typing the user's name in the search dialog then select the name of the list returned. The return list updates automatically as typed, and a user can be clicked from the list at any time (Figure 6.97). Once clicked, the user is added to the current qualified users list.

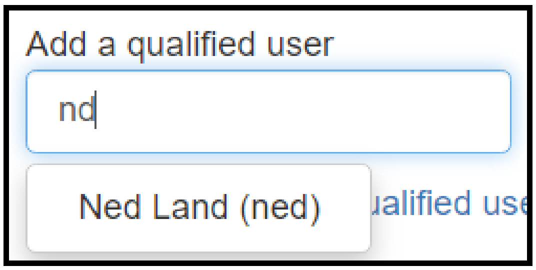


Figure 6.97: *Tool control details qualify a user search list*

6.5.4.2 Email all tool users

If there are any qualified users, an email link will appear below the add a qualified user dialog (Figure 6.98).

Figure 6.98: *Tool control details email all users*

Clicking the link will open the user email page which is described in the Email chapter 27.

6.5.5 Required resources

The required resources are optional and only display if configured (Figure 6.99). Resources are discussed in the Resources chapter 33. Associating resources with tools is discussed in the Detailed administration → Tools section 43.64.

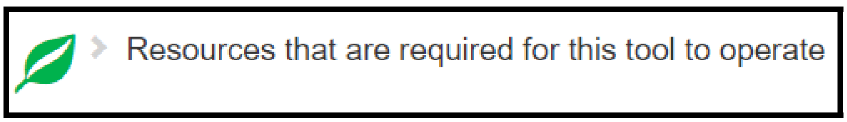


Figure 6.99: *Tool control details required resources*

Clicking the will expand the required resource list (Figure 6.100).

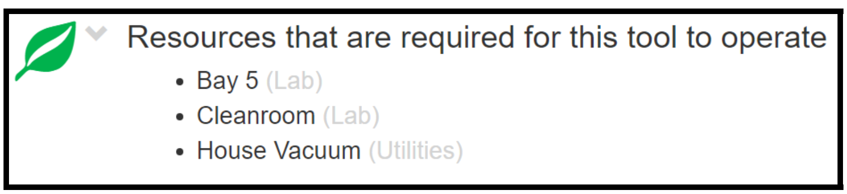


Figure 6.100: *Tool control details require resources expanded*

Clicking the will collapse the required resource list.

6.5.6 Optional resources

The optional resources are optional and only display if configured (Figure 6.101). Resources are discussed in the Resources chapter 33. Associating resources with tools is discussed in the Detailed administration → Tools section 43.64.

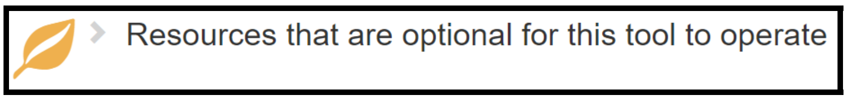


Figure 6.101: *Tool control details optional resources*

Clicking the will expand the optional resource list (Figure 6.102).

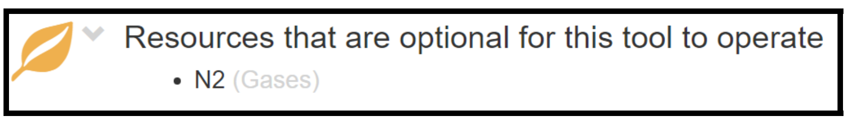


Figure 6.102: *Tool control details optional resources expanded*

Clicking the will collapse the required resource list.

6.5.7 Task and comment history

The task and comment history provides a way to look at problems, shutdowns, and comments that are currently open or have been previously closed (Figure 6.103).

Figure 6.103: *Tool control details task and comment history*

Clicking the will expand the optional resource list (Figure 6.104).

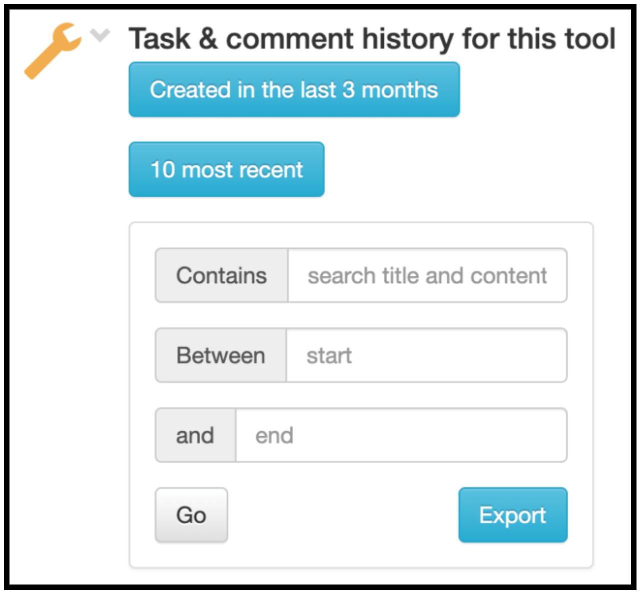


Figure 6.104: *Tool control details task and comment history expanded*

Clicking the will collapse the required resource list.

The expanded task and comment history provides quick buttons to display all items created in the last three months (Figure 6.105) or the ten most recent events (Figure 6.106). Clicking either will show a list of tasks and comments below the search dialog (Figure 6.107).

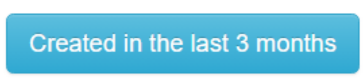


Figure 6.105: *Tool control details task 3-month button*

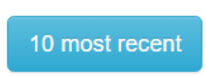


Figure 6.106: *Tool control details task 10 most recent button*

A search dialog is also provided to allow a keyword search or any date range to be displayed (Figure 6.107).

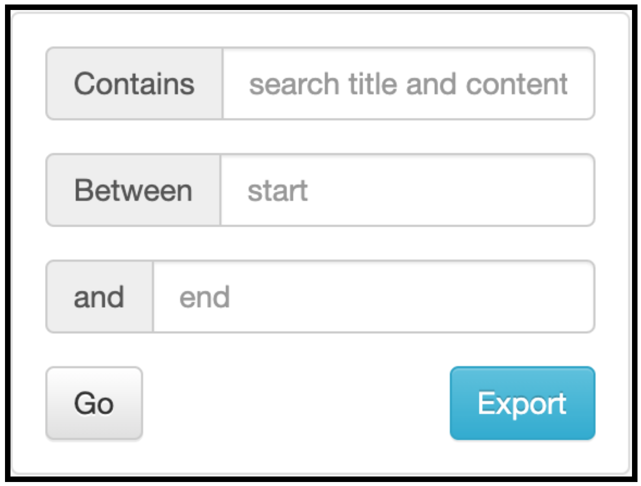


Figure 6.107: *Tool control details task search dialog*

For a key word search, enter the search text in the contains field (Figure 6.108).

Figure 6.108: *Tool control details task search text*

For a date range search, click the start and end dialogs to enter dates. A calendar dialog will appear that can be used to navigate to the date of interest (Figure 6.109). However, a date can be typed directly into each box.

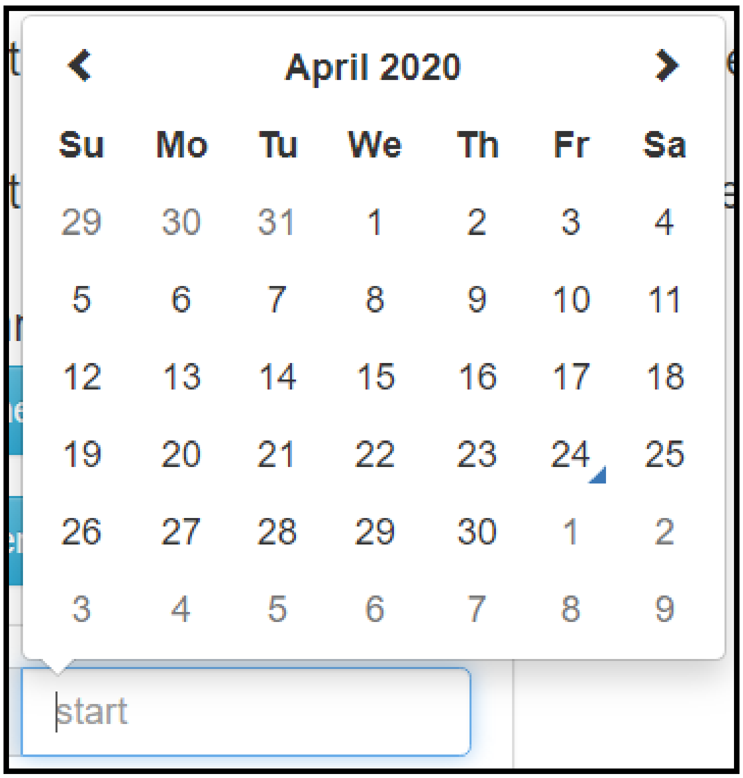


Figure 6.109: *Tool control details task calendar dialog*

The search can also combine text search and date ranges. To make open ended, leave fields blank. For example, to show all tasks, leave the contains field and start date blank and enter today's date into the end date, all task records will be returned.

Click the Go button to display results below the dialog (Figure 6.110).

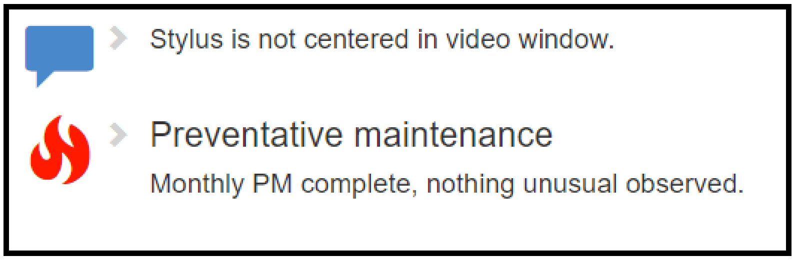


Figure 6.110: *Tool control details task display results*

Clicking the will expand task or comment details (Figure 6.111).

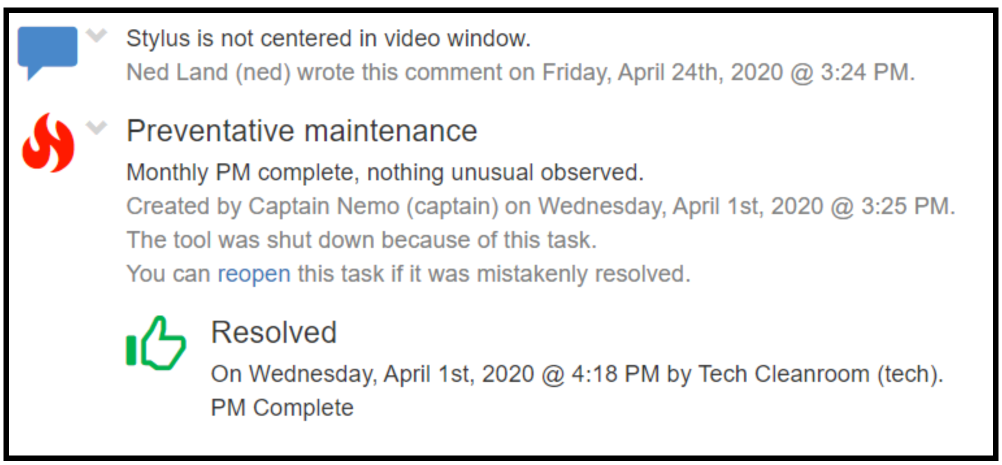


Figure 6.111: *Tool control details task results expanded*

Clicking the will collapse the details.

Clicking the Export button will export current shown tasks and comments into a text file.

6.5.7.1 Reopen closed task (staff only)

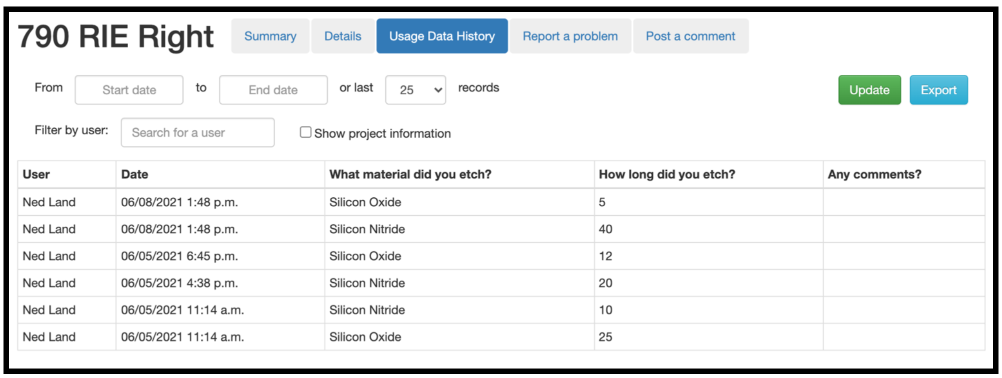
If a staff member is viewing task history, a line will be displayed giving the option to reopen the task (Figure 6.112).

Figure 6.112: *Tool control details task results reopen task link*

Clicking on the reopen link will open the task update page at sub-subsection 6.4.5.5. Click update to reopen the task.

6.6 Usage Data History

The usage data history tab provides users and staff with the ability to see how a tool was used based on answers to pre/post usage questions (Figure 6.113). This feature is useful to replace handwritten logbooks and gives easy access to pre/post usage question data. The tab will only be visible on tools that have pre/post usage questions configured. The usage data history is searchable by date, last records, and can be filtered by user. The selected data can be exported in a comma separated text file.



User	Date	What material did you etch?	How long did you etch?	Any comments?
Ned Land	06/08/2021 1:48 p.m.	Silicon Oxide	5	
Ned Land	06/08/2021 1:48 p.m.	Silicon Nitride	40	
Ned Land	06/05/2021 6:45 p.m.	Silicon Oxide	12	
Ned Land	06/05/2021 4:38 p.m.	Silicon Nitride	20	
Ned Land	06/05/2021 11:14 a.m.	Silicon Nitride	10	
Ned Land	06/05/2021 11:14 a.m.	Silicon Oxide	25	

Figure 6.113: *Tool control usage data history*

6.6.1 Feature setup

- The usage data history page is automatically displayed once pre or post usage questions have been setup for a tool.
- Pre/Post usage question setup is discussed in detail in the Detailed administration $\rightarrow$ Tools section 43.64.
- Pre/Post usage questions can be configured so responses are either required or optional. In addition, questions can be grouped and repeated a configurable number of times to capture multiple processes in a single

tool usage. If a combination of grouped and ungrouped questions are configured, the ungrouped question responses only appear with the first group response.

6.6.2 Review usage data history for a tool

- Navigate to the tool control page.
- Select the tool of interest from the tool list on the sidebar.
- Click the usage data history tab.
- The default view lists the last 25 records.

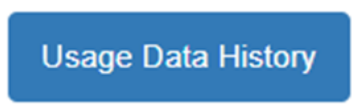


Figure 6.114: *Tool control usage data history tab*

- Select the date range or the last number of records:
  - Enter a start and end date if desired.
  - Or select the last number or records.
  - Click update to refresh the view.

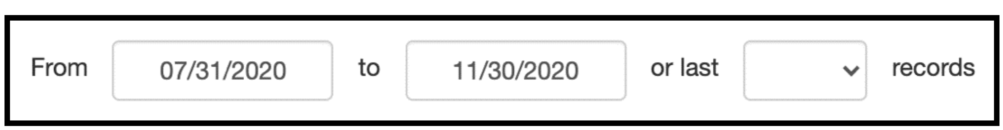


Figure 6.115: *Tool control usage data history date range or last records*

- Filter by user:
  - Enter a user name in the search box if desired.
  - Click on the user you want to filter by.
  - Click update to refresh the view.

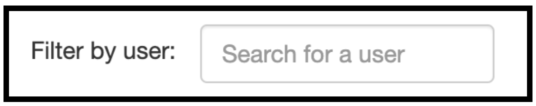


Figure 6.116: *Tool control usage data history filter by user*

- Show project information:
  - Check the box if you want to see project information in the table
  - Click update to refresh the view

Figure 6.117: *Tool control usage data history show project info*

  - The resulting data will include project information:

User	Project	Date	What material did you etch?	How long did you etch?	Any comments?
Ned Land	Project 3	06/08/2021 1:48 p.m.	Silicon Oxide	5	
Ned Land	Project 3	06/08/2021 1:48 p.m.	Silicon Nitride	40	
Ned Land	Project 3	06/05/2021 6:45 p.m.	Silicon Oxide	12	
Ned Land	Project 3	06/05/2021 4:38 p.m.	Silicon Nitride	20	
Ned Land	Project 3	06/05/2021 11:14 a.m.	Silicon Nitride	10	
Ned Land	Project 3	06/05/2021 11:14 a.m.	Silicon Oxide	25	

Figure 6.118: *Tool control usage data history with project information*

- Scroll through the returned data to review.
- To export the selected data, click the export button.

Figure 6.119: *Tool control usage data history export button*

6.7 Config History

The config history tab provides users and staff with the ability to see how a tool was configured previously (Figure 6.120). The tab will only be visible on tools that are configurable. Configuration history is saved in the database and is discussed in the Detailed administration → Configuration histories section 43.15.2. Configurations are discussed in the Configuration Agenda chapter 26.

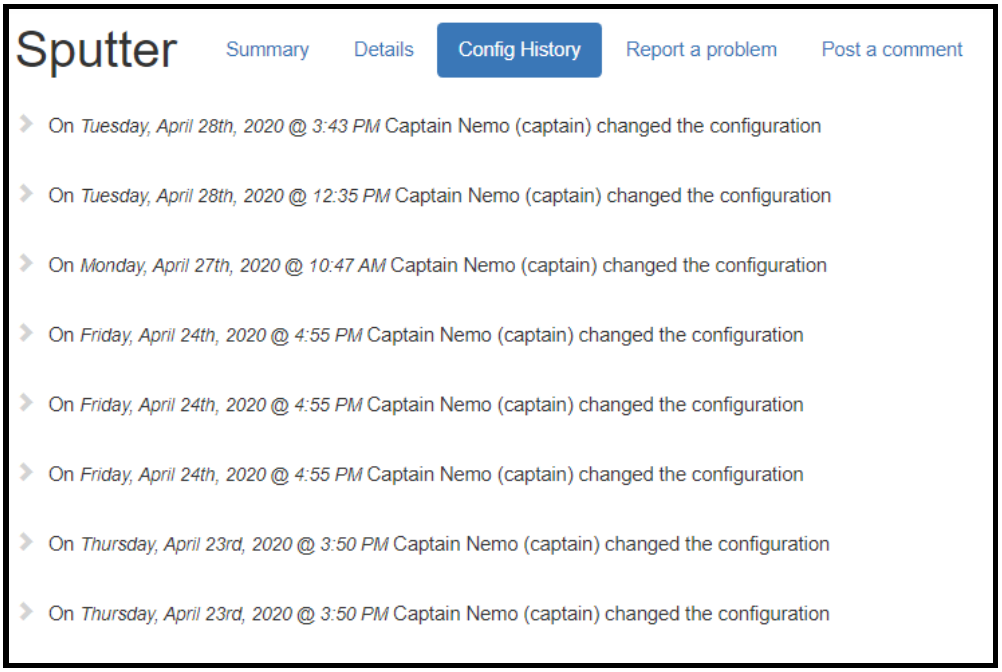


Figure 6.120: *Tool control config history page*

Click the › icon to expand the details of a particular configuration (Figure 6.121).

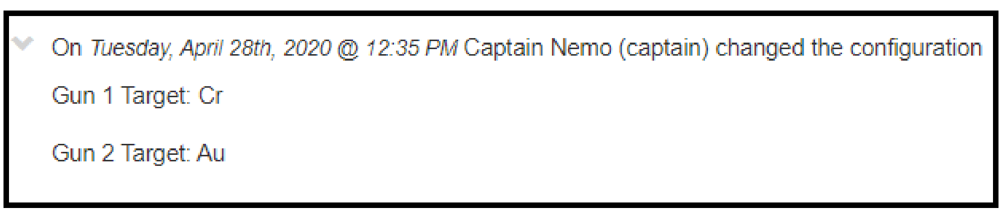


Figure 6.121: *Tool control configuration details*

Click the ⌄ icon to collapse the details.

6.8 Report a problem Tab

The report a problem tab provides users and staff with the ability to alert others to problems with a tool (Figure 6.122). If a tool is unusable, it can be shut down and the tool owner notified. If it poses a safety hazard, more staff can be alerted. Predefined problems can also be automatically reported using pre/post usage questions as described in section 50.2.

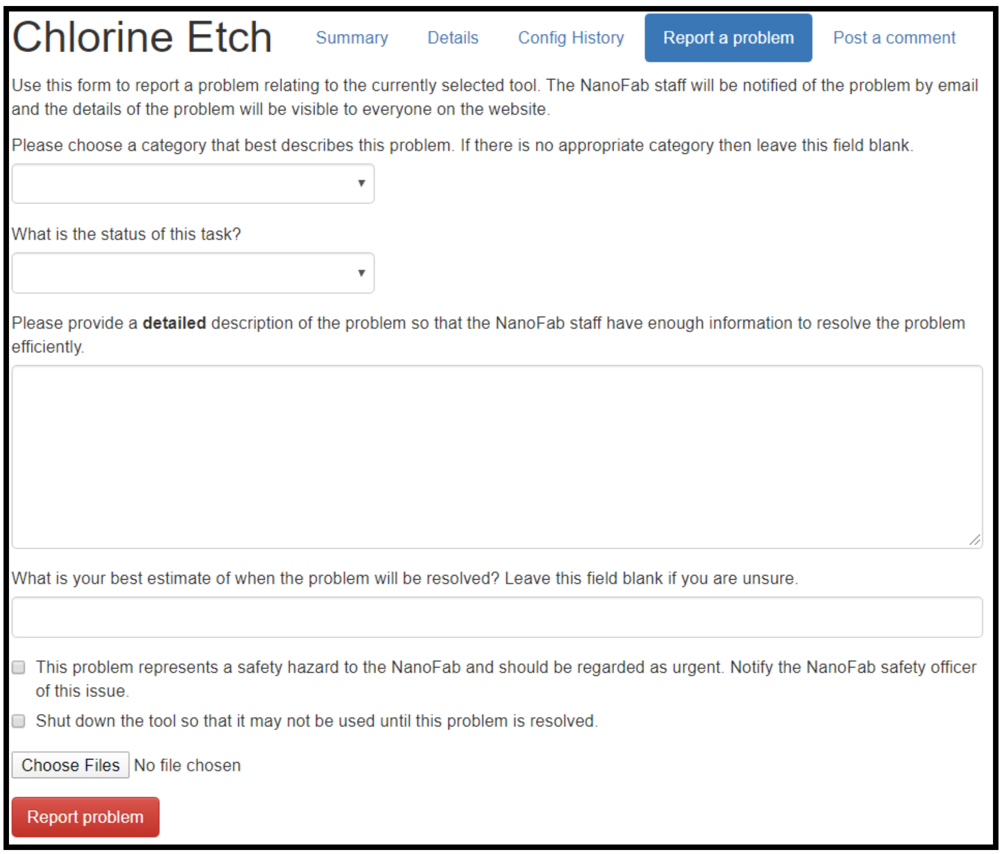


Figure 6.122: *Tool control report a problem page*

6.8.1 To report a problem

- Navigate to the tool control page.
- Select the tool of interest from the tool list on the sidebar.
- Click the report a problem tab.
- If task categories have been defined, a dropdown and instruction will appear. Click the dropdown and select the problem category that best describes the problem (Figure 6.123). If no category describes the problem, leave this blank. Task categories can be used to bin problems making future problem analysis easier. Categories are configured on the Detailed administration → Task categories page, see section 43.56.

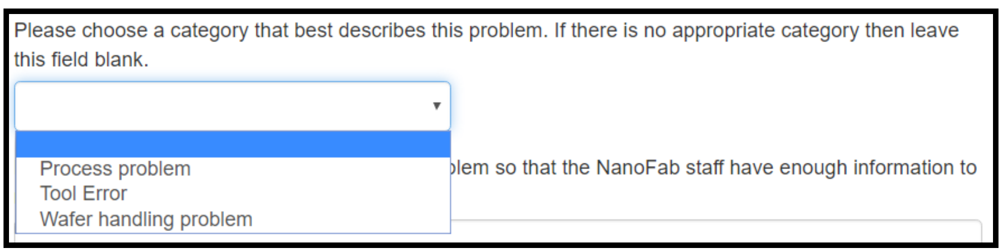


Figure 6.123: *Tool problem category selection*

- (Staff Only) If task statuses have been defined, a dropdown and instruction will appear (Figure 6.124). If the status is not known, the field can be left blank. Click the dropdown and select the initial status for the problem. Task statuses are used to update various staff as a problem progresses to resolution. For example, once the maintenance team has finished a repair, they can change the status to qualification which notifies the process engineer that the tool is ready to requalify. Statuses are configured on the Detailed administration → Task statuses page, see section 43.57.

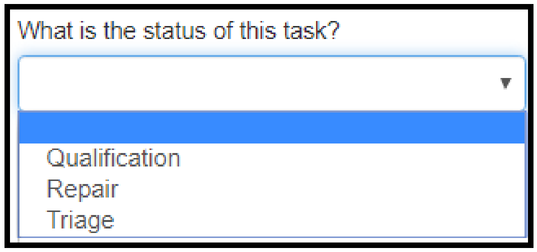


Figure 6.124: *Tool problem task status selection*

- Provide a detailed description of the problem in the dialog box (Figure 6.125).

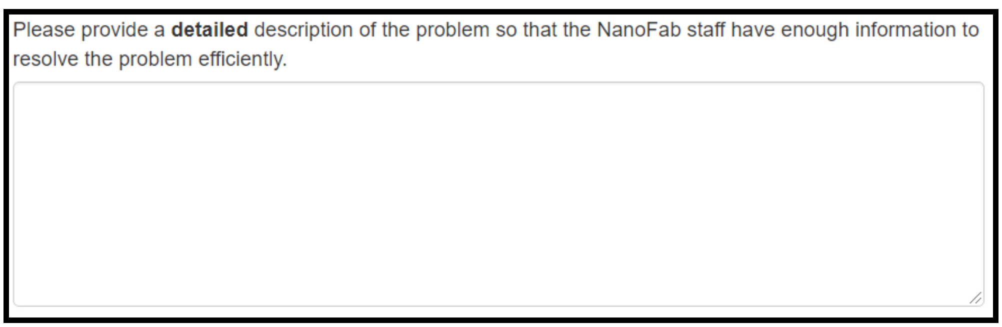


Figure 6.125: *Tool problem detailed description*

- (Staff only) Provide an estimate of when the problem will be resolved if known or leave blank (Figure 6.126). Clicking in the dialog will open a date and time dialog (Figure 6.127).

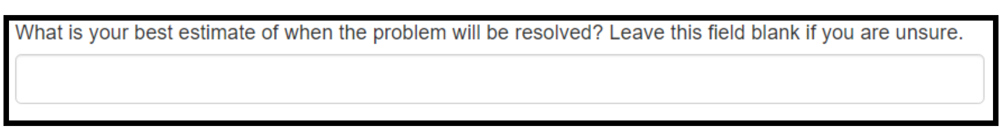


Figure 6.126: *Tool problem estimated repair time*

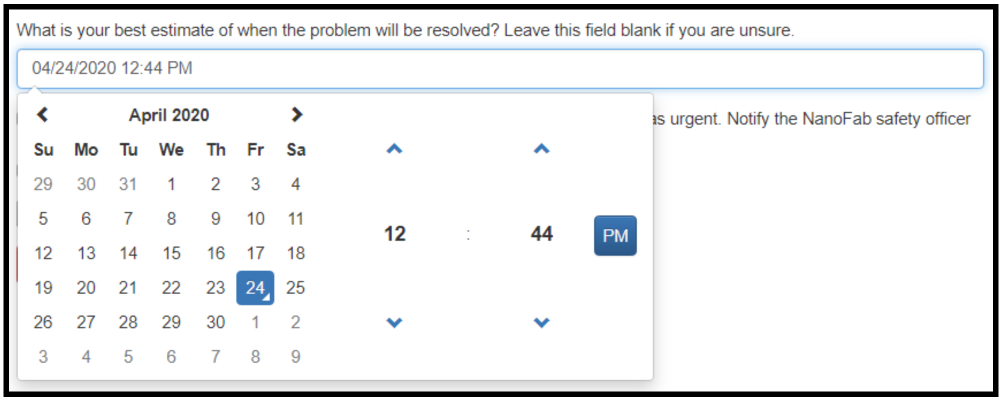


Figure 6.127: *Tool problem estimated repair date and time dialog*

- Check the safety hazard check box if the problem is a safety hazard to people or equipment (Figure 6.128).

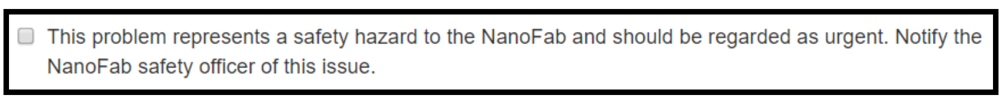


Figure 6.128: *Tool problem safety hazard*

- Check if the shutdown check box if the tool is not able to be used by others and could potentially ruin samples (Figure 6.129).

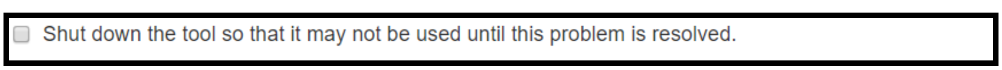


Figure 6.129: *Tool problem shut down*

- The choose files dialog may be used to upload any relevant pictures or data to show details that support the description (Figure 6.130). Clicking the button activate a standard file selection dialog. Multiple files can be uploaded. Note: it is good practice to make note of the files in the description to link the file to the text.

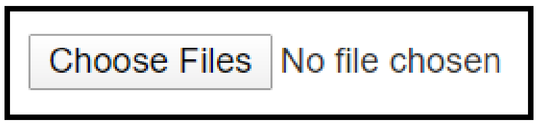


Figure 6.130: *Tool problem upload files*

- Click the report button to finish (Figure 6.131).

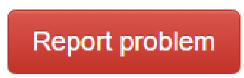


Figure 6.131: *Tool problem report button*

6.8.2 Problem posting

Once the Report problem button is clicked, a task is created and saved in the Tasks table of the database which is discussed in the Detailed administration → Tasks section 43.58.

Tasks are displayed as problems and shutdowns in the summary tab of the tool control page.

Email notifications are triggered.

- Email notifications are only sent if the New task email has been configured in the Customization chapter 41.
- Recipients set at the tool level as discussed in the Detailed administration → Tools section 43.64.
  - Primary tool owner.
  - Backup tool owners if any are defined.
  - Notification email if defined.
- Recipients set in settings.py LAB_MANAGERS as discussed in the Configuring NEMO settings → Lab Managers chapter 54.
- Recipients any non-staff user with a future reservation.

If the task is marked as a safety hazard

- In addition to the standard email notifications, a safety issue is automatically created, and a safety email is sent. Safety issues are discussed in the Safety page section.

6.9 Post a comment Tab

The post a comment tab provides users and staff with the ability to record information about a tool without changing the tool status (Figure 6.132). It is useful for highlighting tool usage information, process results, and general comments. Unlike reporting a problem, staff are not notified when a comment is posted therefore, comments should not be used to report problems or shutdowns.

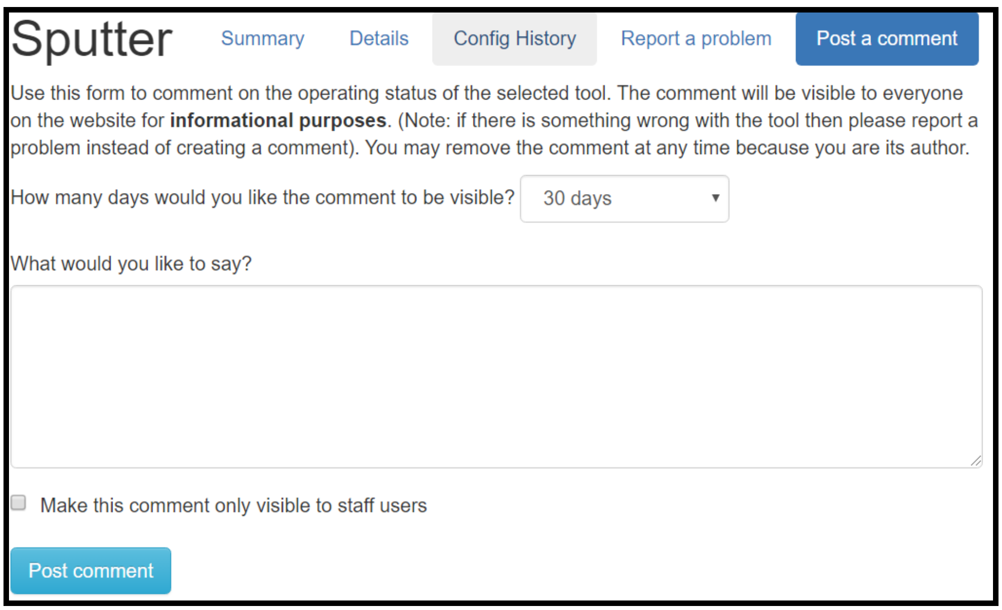


Figure 6.132: *Tool control post a comment page*

6.9.1 To post a comment

- Navigate to the tool control page.
- Select the tool of interest from the tool list on the sidebar.
- Click the Post a comment tab.
- Click the drop down and select the amount of time to keep the comment visible (Figure 6.133).

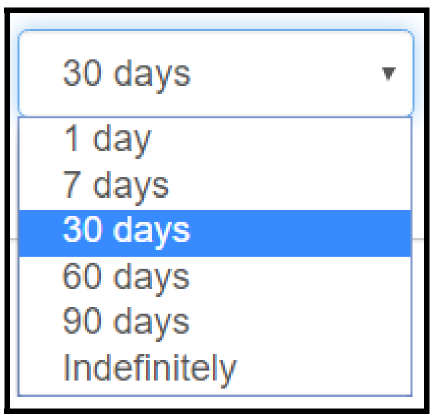


Figure 6.133: *Comment visible time dropdown*

- Enter any relevant information in the dialog box (Figure 6.134).

Figure 6.134: *Comment dialog box*

- Check to make comment visible only to staff (staff only) (Figure 6.135). This feature is useful to post special tool information.

Figure 6.135: *Comment dialog staff visible checkbox*

- Click the post comment button (Figure 6.136).

Figure 6.136: *Comment post button*

6.9.2 Comment posting

Once the Post comment button is clicked, the comment is saved in the Comments table of the database which is discussed in the Detailed administration → Comments section 43.14. Comments are displayed in the summary tab of the tool control page. No email notifications are triggered.

6.10 Mobile device tool control

The tool control page will automatically change to a mobile display by stacking information into a single scrollable column (Figure 6.137). All of the features are available while in mobile view. To start, directly enter the name of the tool in the search dialog or select a tool by category. All categories and sub-categories are listed.

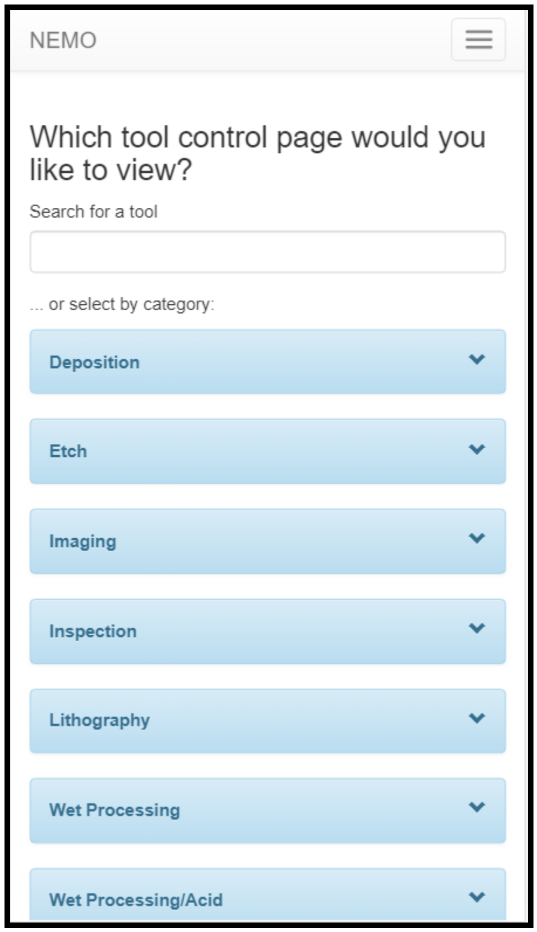


Figure 6.137: *Mobile tool control page*

6.10.1 Search for a tool

To search for a tool, start typing in the search dialog box. A tool button list will appear below the search dialog as characters are entered but at least two characters must be entered (Figure 6.138). Once the tool of interest appears, click the button of the tool of interest to go to the tool control page detailed below.

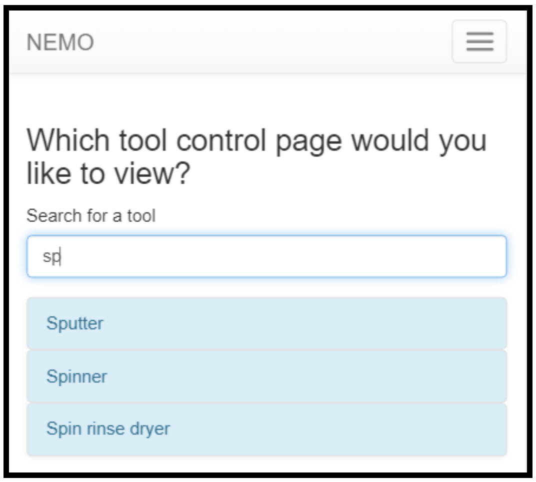


Figure 6.138: *Mobile tool control search box and results*

6.10.2 Select a tool by category

To select a tool by category, click the category button then click the tool link in the drop down. If the tool of interest is not on the list, click another category button (Figure 6.139). Note: it is possible to have more than one category at a time expanded. However, the page resets each time it is opened. Once the tool of interest appears, click the button of the tool of interest to go to the mobile tool reservation page detailed below.

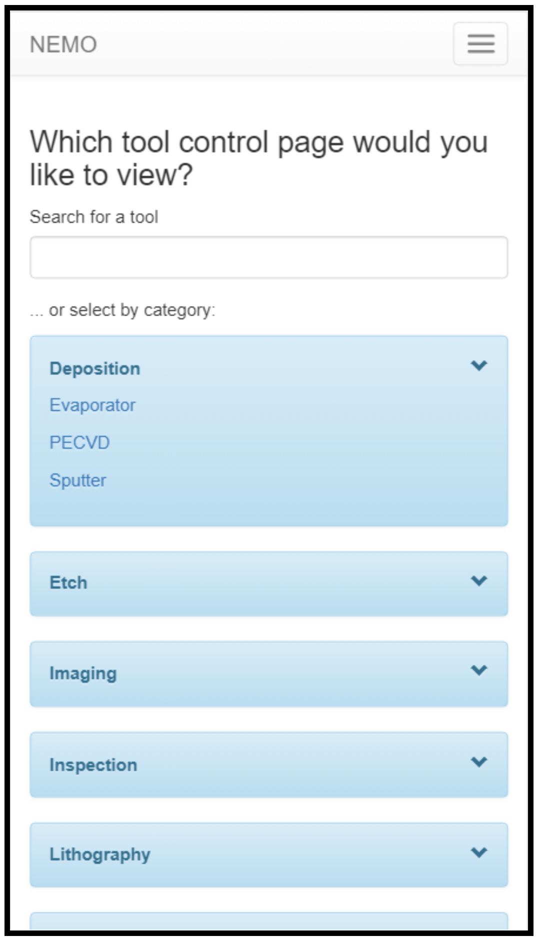


Figure 6.139: *Mobile tool control category drop down*

6.10.3 Mobile tool control page

The mobile tool control page lands on the summary tab (Figure 6.140). The summary tab, details tab, report a problem tab, and post a comment tab do not have any specializations to render on a mobile device. To select each tab, click or press near the tab title. Functionality is identical to the previously described tab features. If a tab renders larger than a screen, drag the screen to scroll.

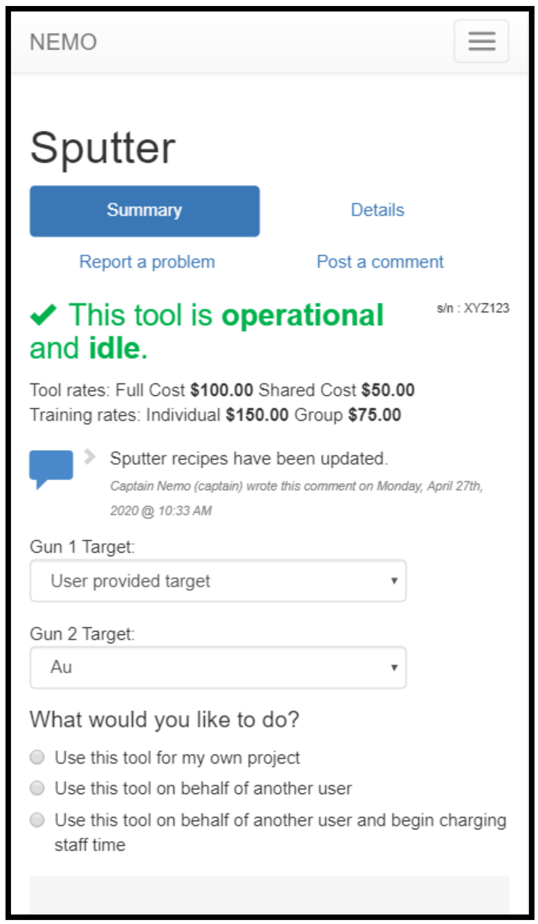


Figure 6.140: *Mobile tool control landing page*

6.11 Tool control customizations

6.11.1 Notification emails

Email notifications are possible when a task is created, updated, or resolved or a user tries to use a tool they are not qualified for and must be configured to be functional. Email templates are configured in the Customization page, see chapter 41.

6.11.2 Tool usage reminders

Tool usage reminder emails can be sent periodically. A timed service app must be properly configured and running which is described in the NEMO timed services section 54.3. The usage reminder email template must be configured and is described in the Customization pages, see chapter 41.

6.11.3 Tool rates

Tool rates can be customized and are discussed in the Customizations $\rightarrow$ Tool rates section 41.9.

6.11.4 Tool control page refresh rate

The tool control page automatically refreshes every 30 seconds which updates the current tool information and sidebar. To change the update interval, edit the tool_control.html and change the setInterval constant (in milliseconds) in the on_load function.

6.11.5 Tool control hide usage data history for users

Whether to display the usage data history for regular users can be customized in Customization $\rightarrow$ Tool settings, see section 41.14.

6.11.6 Optional tool features

The tool control pages were implemented such that if a feature was not used, its corresponding content would not be displayed. This helps eliminate the need for special setups to view features and easily enables many features to be optional. All of the optional features are detailed in the tool control pages.

CHAPTER 7

Status dashboard

The status dashboard page provides a convenient overview of all users and staff currently logged into any areas or tools. In addition, there are views for problematic tools, idle tools, and an all-tool view. The status dashboard lands on the area occupancy tab by default.

7.1 Web address

The status dashboard page is accessible at site-address/status_dashboard/. The page can also be accessed from the navigation bar menu item "Status dashboard".

7.2 Area occupancy tab

The status dashboard lands on the area occupancy tab by default and the area occupancy tab will be highlighted with a blue background (Figure 7.1). This view shows all users that are currently logged into all areas. Staff members are highlighted in green and service personnel are highlighted in orange, so they stand out. Each area will list the number of people in the area if it is greater than 1. Staff and service personnel are listed separately if the area is configured not to include them in the occupancy count. Lab areas are configured through the Detailed administration → Areas page, see section 43.8.

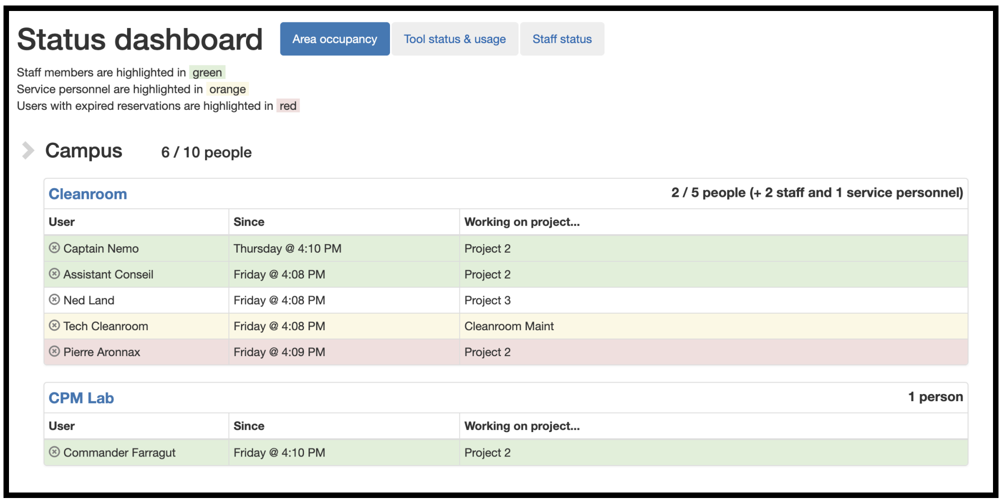


Figure 7.1: *Status dashboard area occupancy*

7.2.1 Maximum occupancy

If an area has a maximum occupancy set, the number of people will be listed as total of the maximum (Figure 7.2).

Figure 7.2: *Status dashboard below maximum occupancy*

If the occupancy is within one person, a yellow warning will be displayed with the occupancy (Figure 7.3).

Figure 7.3: *Status dashboard near maximum occupancy*

If the occupancy is at or above the limit, a red warning will be displayed with the occupancy (Figure 7.4).

Figure 7.4: *Status dashboard at or above maximum occupancy*

7.2.2 Force user out of area (staff only)

Staff will see a ⊗ icon next to each user's name. Clicking the icon will log the user out of the area. There is no prompt for confirmation, the logout is immediate.

7.3 Tool status & usage tab

Clicking the ‘Tool status & usage’ tab will switch the view and highlight the tab with a blue background. The default view is the ‘tools in use’ filter. To change the filter, click the dropdown and click the filter of interest (Figure 7.5). All filter views show the tool name, user name, and when they started using the tool. The tool names are followed by status icons which are identical to those describe in the Tool control → Side bar Tool list icons section 6.2.

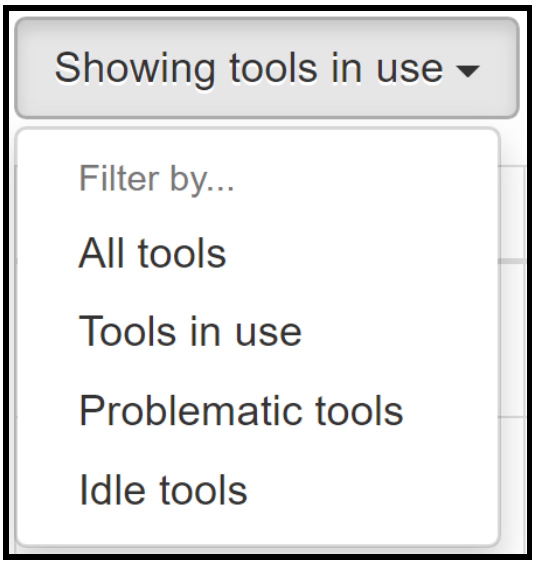


Figure 7.5: *Status dashboard tool filter*

7.3.1 Force user off of tool (staff only)

Staff will see a ⊗ icon next to each user’s name on all tool status views except for idle tools. Clicking the icon will log the user out of the tool. There is no prompt for confirmation, the logout is immediate. All normal logout procedures are skipped and if interlocks are defined, the interlock is turned off immediately. If there are required post usage questions, an email will be sent to the user, the staff member who forced him off, the tool owner and backup owners, as well as the lab managers. The email will contain the required questions and the tool usage data entry will be blank for usage. Tool logout procedures are discussed in the Tool control $\rightarrow$ Summary tab $\rightarrow$ Tool log out subsection 6.4.9.

7.3.2 Tools in use

The ‘tools in use’ filter will only show tools that currently have someone logged in (Figure 7.6).

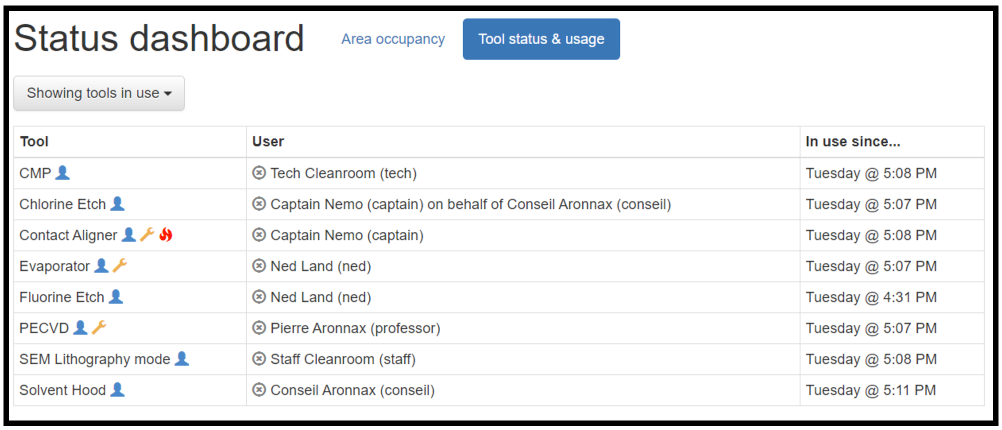
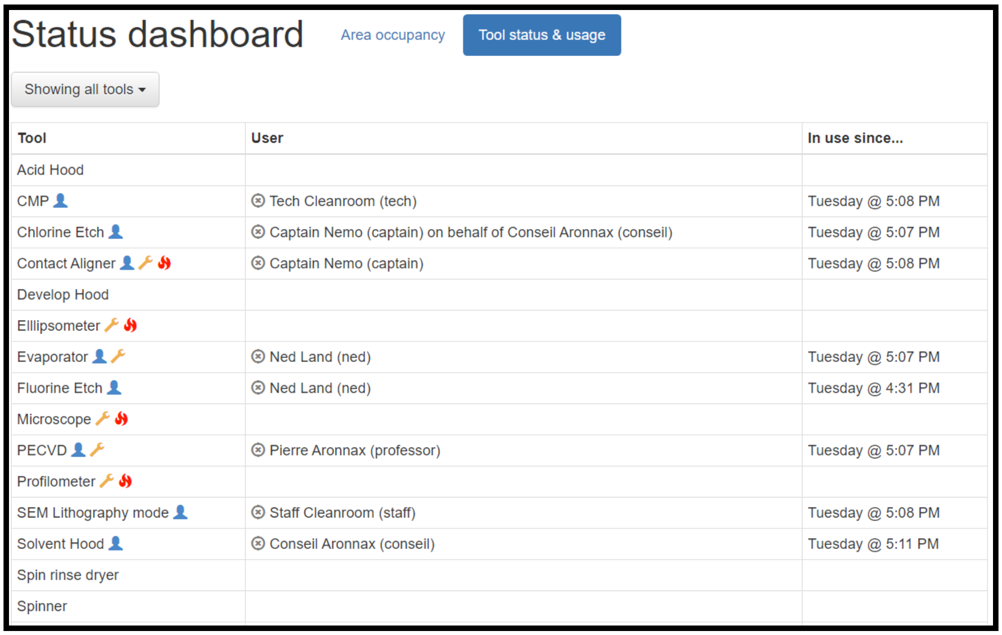


Figure 7.6: *Status dashboard tools in use*

7.3.3 All tools

The 'all tools' filter displays all tools regardless of log in or problem status (Figure 7.7).



Status dashboard Area occupancy Tool status & usage

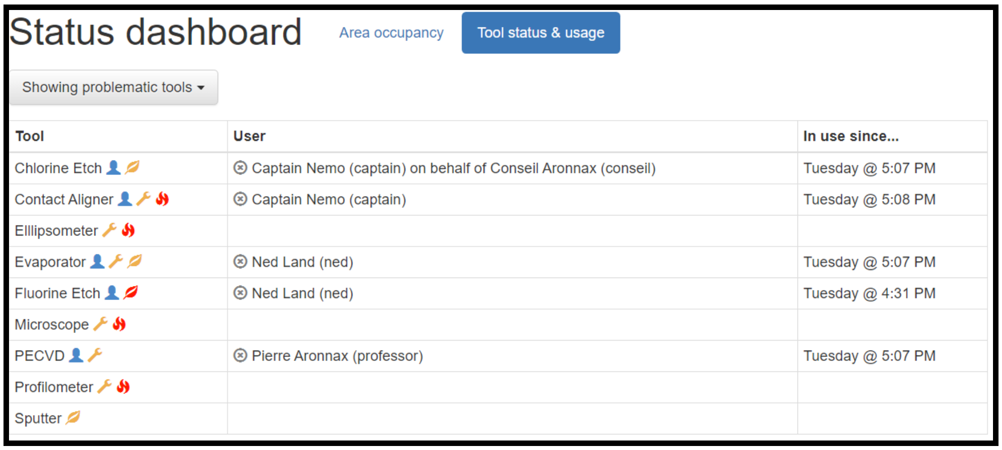
Showing all tools

Tool	User	In use since...
Acid Hood		
CMP	Tech Cleanroom (tech)	Tuesday @ 5:08 PM
Chlorine Etch	Captain Nemo (captain) on behalf of Conseil Aronnax (conseil)	Tuesday @ 5:07 PM
Contact Aligner	Captain Nemo (captain)	Tuesday @ 5:08 PM
Develop Hood		
Ellipsometer		
Evaporator	Ned Land (ned)	Tuesday @ 5:07 PM
Fluorine Etch	Ned Land (ned)	Tuesday @ 4:31 PM
Microscope		
PECVD	Pierre Aronnax (professor)	Tuesday @ 5:07 PM
Profilometer		
SEM Lithography mode	Staff Cleanroom (staff)	Tuesday @ 5:08 PM
Solvent Hood	Conseil Aronnax (conseil)	Tuesday @ 5:11 PM
Spin rinse dryer		
Spinner		

Figure 7.7: *Status dashboard all tools*

7.3.4 Problematic tools

The ‘problematic tools’ filter displays all tools with a shutdown, problem, required resource outage or optional resource outage (Figure 7.8).



Tool	User	In use since...
Chlorine Etch	Captain Nemo (captain) on behalf of Conseil Aronnax (conseil)	Tuesday @ 5:07 PM
Contact Aligner	Captain Nemo (captain)	Tuesday @ 5:08 PM
Ellipsometer		
Evaporator	Ned Land (ned)	Tuesday @ 5:07 PM
Fluorine Etch	Ned Land (ned)	Tuesday @ 4:31 PM
Microscope		
PECVD	Pierre Aronnax (professor)	Tuesday @ 5:07 PM
Profilometer		
Sputter		

Figure 7.8: *Status dashboard problematic tools*

7.3.5 Idle tools

The ‘idle tools’ filter displays all tools that are currently not in use regardless of problematic status (Figure 7.9).

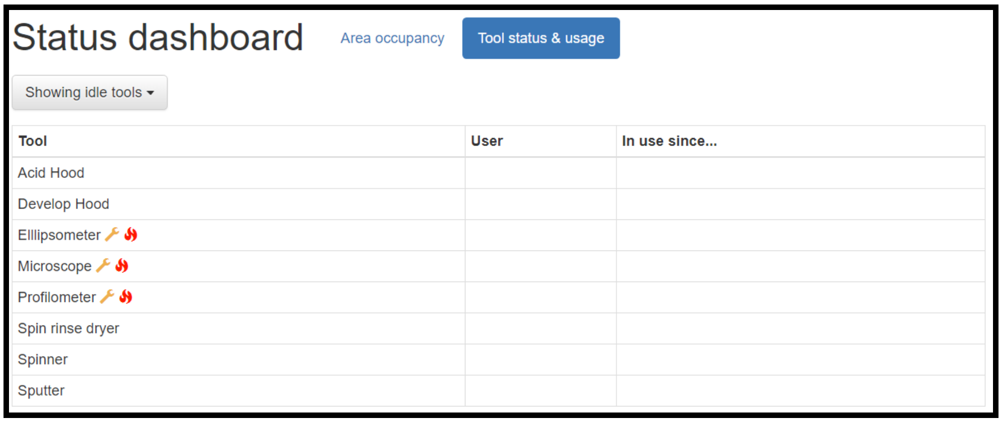


Figure 7.9: *Status dashboard idle tools*

7.4 Staff status tab

Clicking the “Staff status” tab will switch the view to the staff status page, showing staff availability (Figure 7.10). The Staff availability is configurable and explained in detail in the Detailed administration → Staff availability section 43.51.

The current day is highlighted in blue.

Customizations are available for this feature. See Status dashboard settings section 41.13.

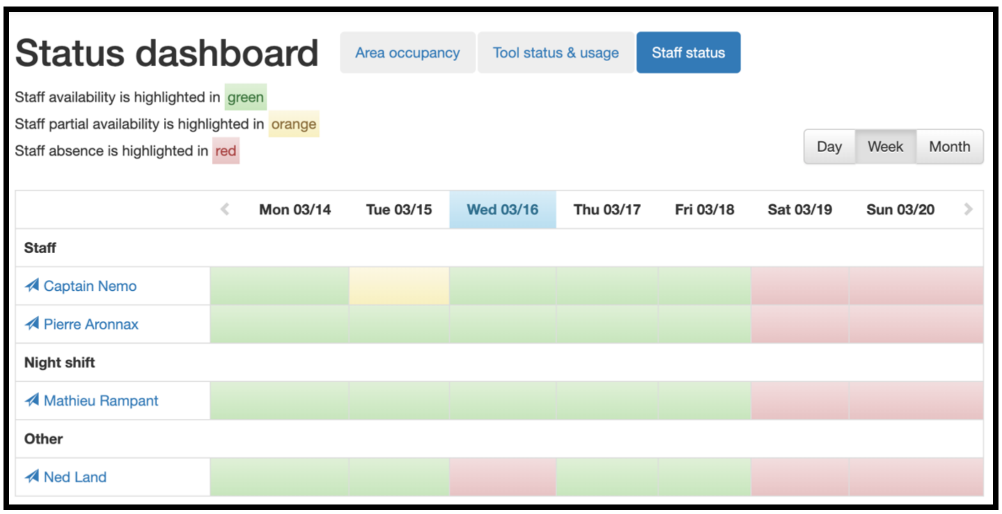


Figure 7.10: *Status dashboard staff status*

Clicking on a staff member's name will display a popup showing contact information. This contact information is pulled directly from Detailed administration → Contact information (Figure 7.11), see section 43.20.

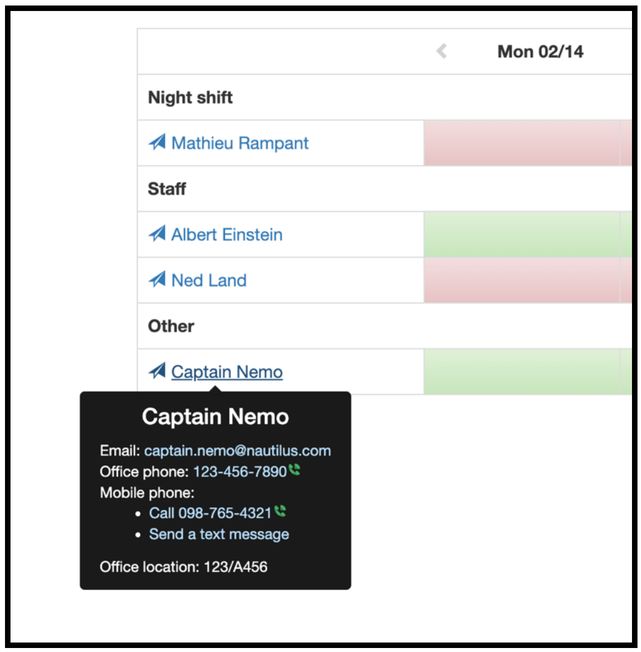


Figure 7.11: *Status dashboard staff contact information*

7.4.1 Changing the view mode

- Clicking on the "day/week/month" button will switch to the desired view (Figure 7.12).

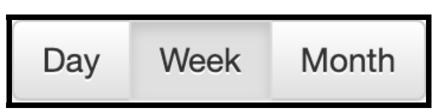


Figure 7.12: *Status dashboard staff switch view mode*

- The default view is the day view (Figure 7.13).

Figure 7.13: *Status dashboard staff day view*

- The week view shows the availability one week at a time (Figure 7.14).

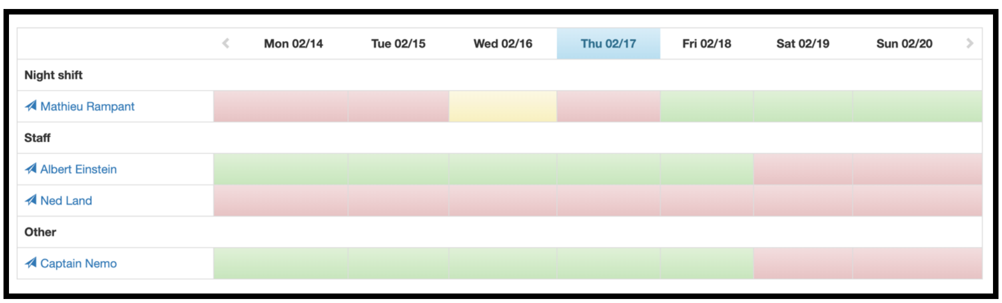


Figure 7.14: *Status dashboard staff week view*

- The month view is scrollable horizontally and will show a much larger timeframe (Figure 7.15).

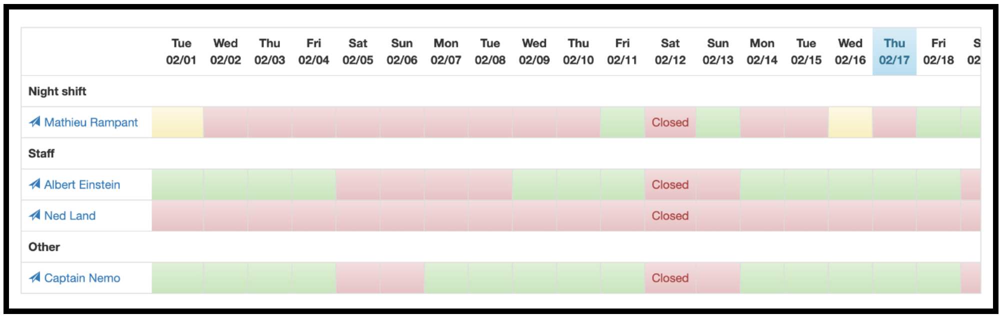


Figure 7.15: *Status dashboard staff month view*

- By default, the current day/week/month is displayed. Clicking on the left or right arrows will take you to the previous/next day, week, or month, respectively (Figure 7.16, Figure 7.17).

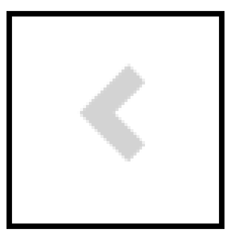


Figure 7.16: *Status dashboard staff previous day/week/month*

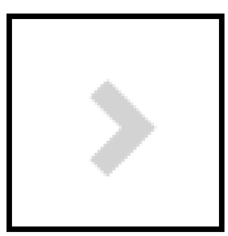


Figure 7.17: *Status dashboard staff next day/week/month*

7.4.2 User and staff view

Regular and staff users can only see staff names, their availability, and any potential facility closure that was set to make all staff absent. There are 3 colors: green if the staff member is available that day, orange is the staff member is available for part of the day only, and red if the staff member is unavailable.

- When a staff member is only available part of the day, a tooltip will show more information if available (Figure 7.18).

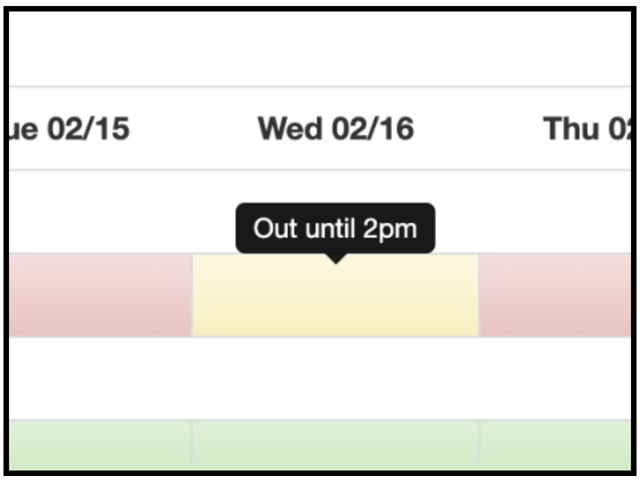


Figure 7.18: *Status dashboard staff partial availability details*

- If the staff member's working hours have been set, a tooltip will show them when hovering over a day when the staff is available (Figure 7.19).

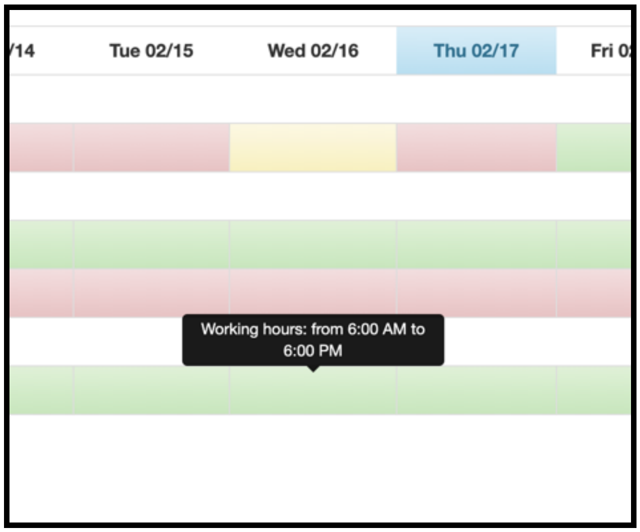


Figure 7.19: *Status dashboard staff availability details*

- If there is a facility closure and the closure was set to make all staff absent, it will say “Closed” and the tooltip will show the closure details (Figure 7.20).

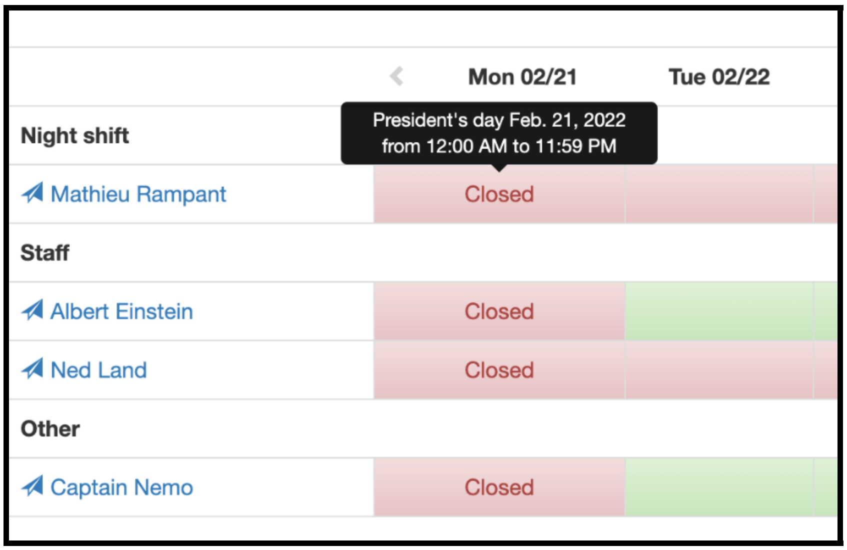


Figure 7.20: *Status dashboard staff closure details*

7.4.3 Facility manager view

- Facility managers' view of the staff status page is more detailed and provide more functionality (Figure 7.21).

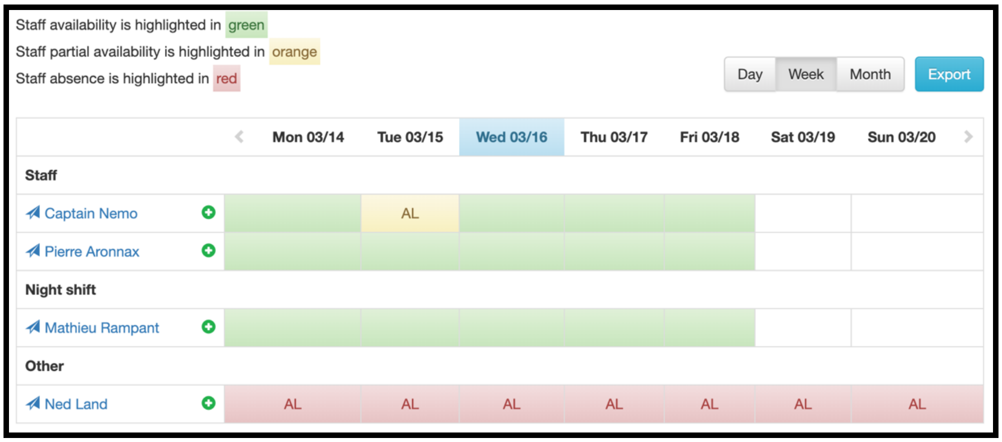


Figure 7.21: *Status dashboard staff status facility managers' view*

- In addition to the red, orange, and green colors for staff availability, facility managers see a white block when the staff member doesn't work on a specific day. In the following example, Captain Nemo doesn't work on Saturdays and Sundays (Figure 7.22).

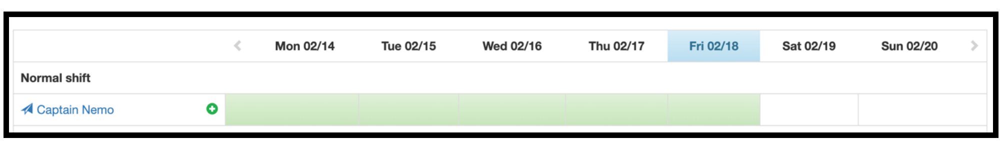


Figure 7.22: *Status dashboard staff non workdays*

- Facility managers can see the absence type and the details by hovering over the absence (Figure 7.23).

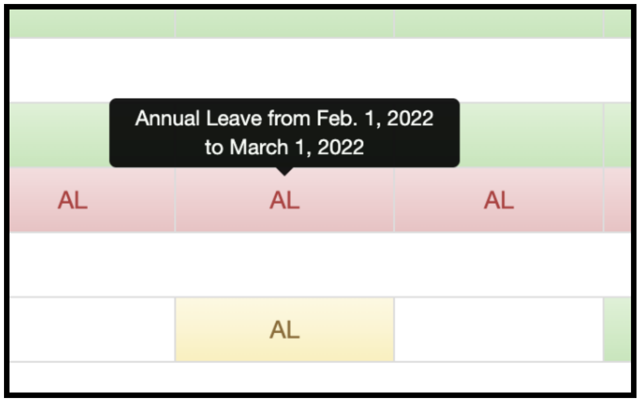


Figure 7.23: *Status dashboard staff absence details*

7.4.4 Create a new absence (facility managers only)

- Facility manager can add new staff absences by clicking on the green plus button next to a staff member's name. The staff absence popup will show up (Figure 7.24).

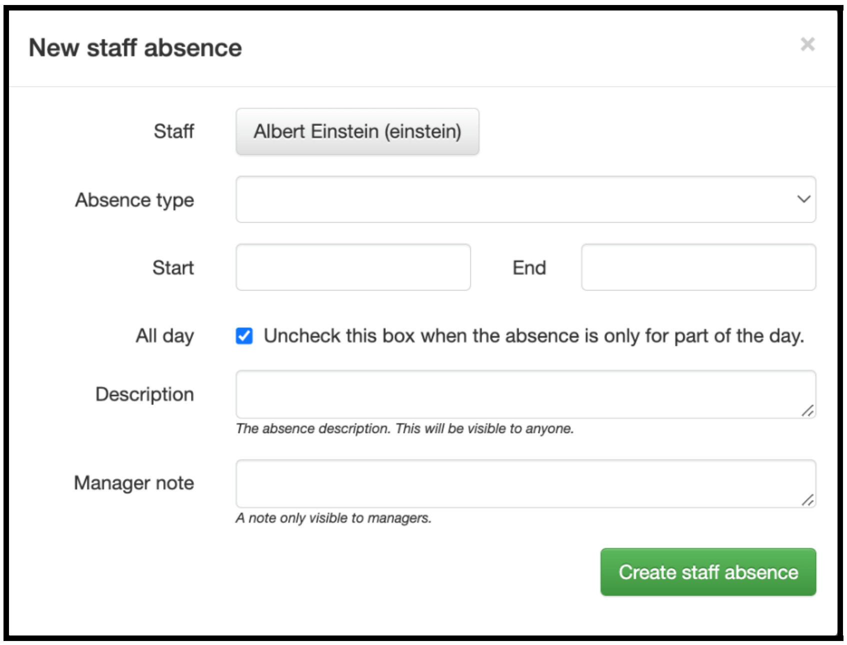


Figure 7.24: *Status dashboard staff create absence popup*

- The staff field is not a direct reference to a user, but to a Staff availability defined in Staff availability, see section 43.51.
- The description field will be shown to all users.
- The Manager note field will only be shown to facility managers.
- Absence type, start and end dates are required.

- After filling out the information, clicking on the “Create staff absence” button will create the absence and refresh the staff status page (Figure 7.25).

Figure 7.25: *Status dashboard create staff absence button*

7.4.5 Edit/Delete an absence (facility mangers only)

- Facility manager can click on the name of an absence in the view (Figure 7.26).

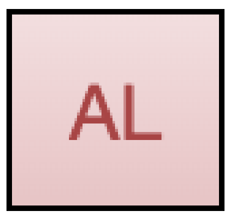


Figure 7.26: *Status dashboard staff absence name*

- This will bring up the edit popup (Figure 7.27).

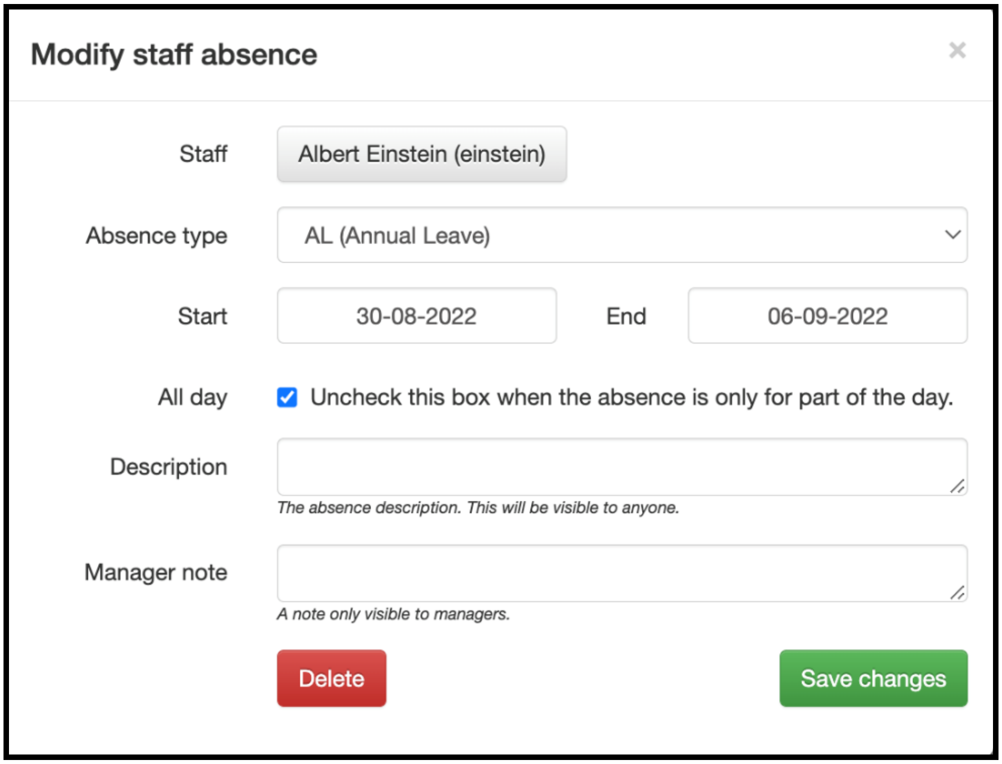


Figure 7.27: *Status dashboard edit absence popup*

- After changing the details, clicking on the "Save changes" button will update the absence and refresh the staff status page (Figure 7.28).

Figure 7.28: *Status dashboard staff save changes button*

- Clicking on the “Delete” button will delete the absence and refresh the staff status page (Figure 7.29).

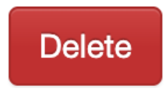


Figure 7.29: *Status dashboard staff delete changes button*

7.4.6 Export staff status (facility managers only)

- Facility managers can export the current view of the staff status by clicking on the “Export” button (Figure 7.30). This will produce a CSV file of the staff status.

Figure 7.30: *Status dashboard staff export button*

7.5 Mobile device status dashboard

The mobile device view organizes the data to fit the width of the screen without reduction of functionality (Figure 7.31, Figure 7.32).

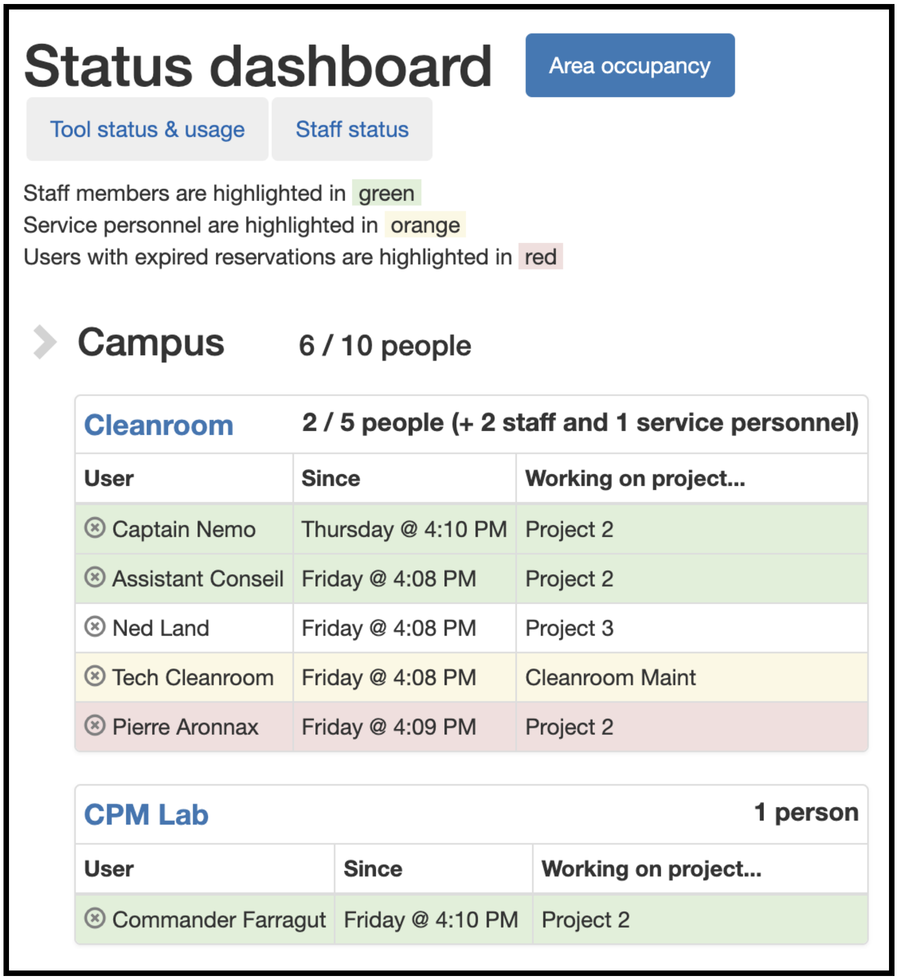


Figure 7.31: *Status dashboard mobile area occupancy view*

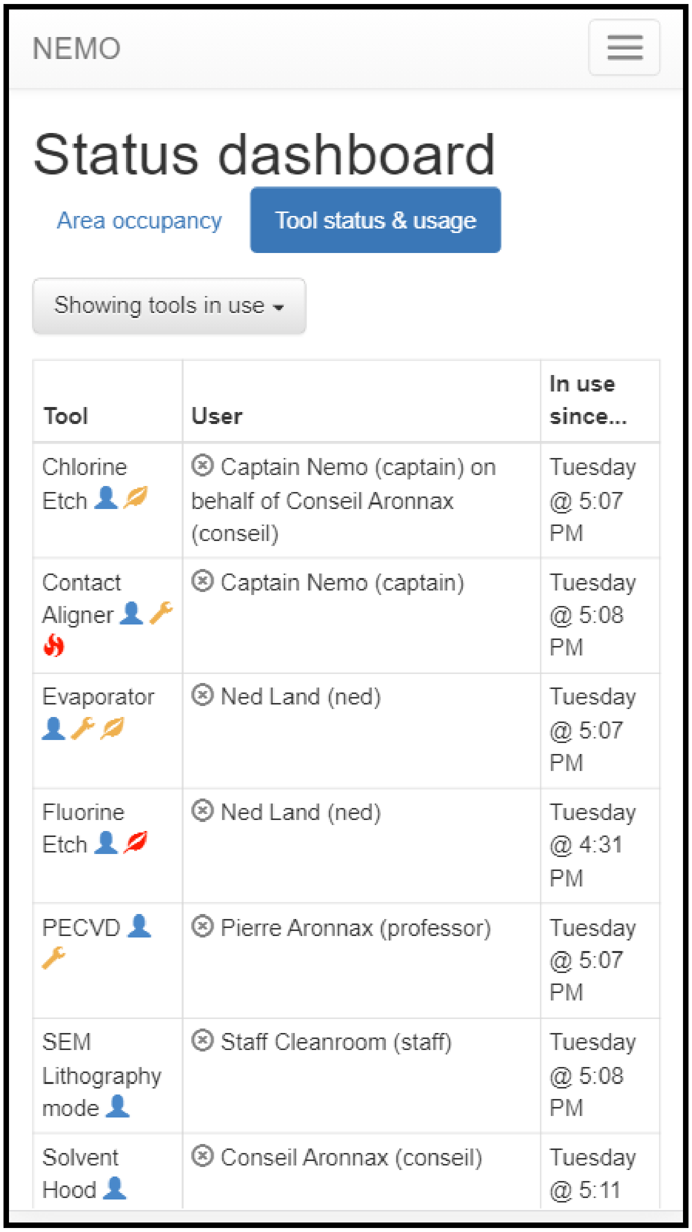


Figure 7.32: *Status dashboard tool status view*

7.6 Status dashboard customizations

7.6.1 Status dashboard refresh rate

The status dashboard page automatically refreshes every 10 seconds which updates the current area occupancy and tool usage information. To change the update interval, edit the status_dashboard.html and change the setInterval constant (in milliseconds) in the on_load function.

7.6.2 Other customizations

Other customizations and settings for the status dashboard are discussed in the Status dashboard settings page 41.13.

CHAPTER 8

Requests

The Requests page is meant to be a common place for user requests. It includes the buddy board, the access requests, the adjustment requests and the staff assistance requests. At least one of the features needs to be enabled for the Requests menu item to show up (Figure 8.1).

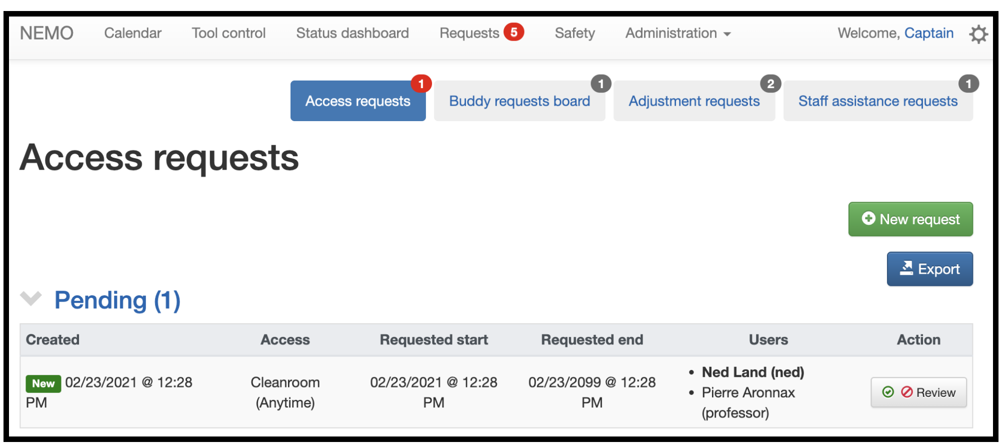


Figure 8.1: *Requests page*

8.1 Buddy board

The buddy board is a simple message system that enables facility users to pair up or form working groups required in many facilities for out of hours access.

To enable the buddy board, you must first enable it on an area. See Detailed administration $\rightarrow$ Areas section 43.8.

8.1.1 Web address

The buddy board page is accessible at site-address/user_requests/buddy/. The page can also be accessed from the navigation bar menu item “Requests”.

8.1.2 Usage

8.1.2.1 Open the buddy board

Click the Requests then on the Buddy board to access the buddy board. The page shows a new request button in the right upper corner, instructions, and the current list of buddy requests and replies (Figure 8.2).

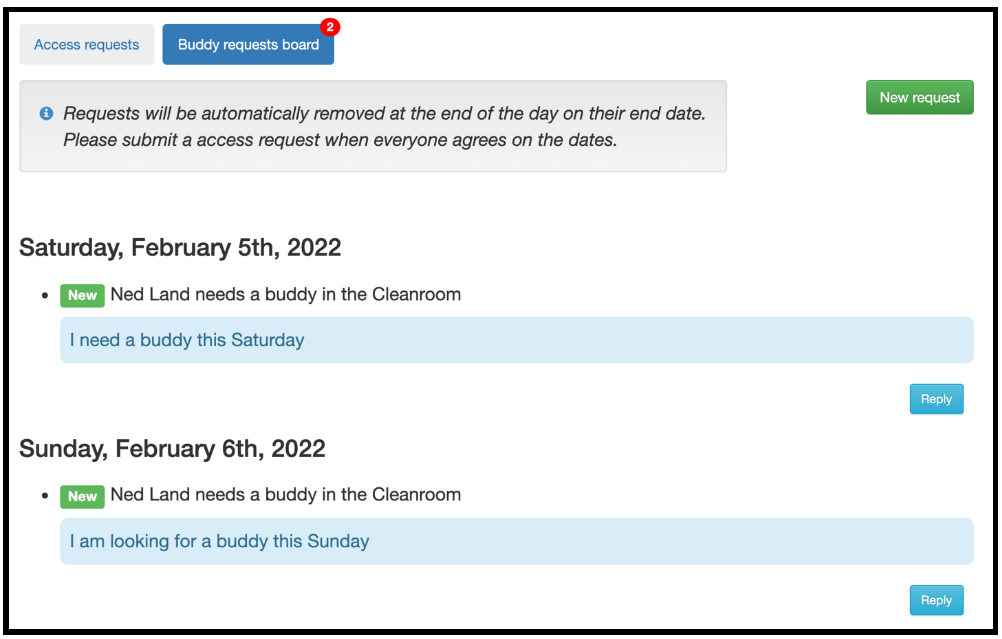


Figure 8.2: *Buddy board display*

8.1.2.2 Create a new request

To create a new buddy request:

- Click the New request button (Figure 8.3).

Figure 8.3: *Buddy board new request button*

- The new request page will open (Figure 8.4).

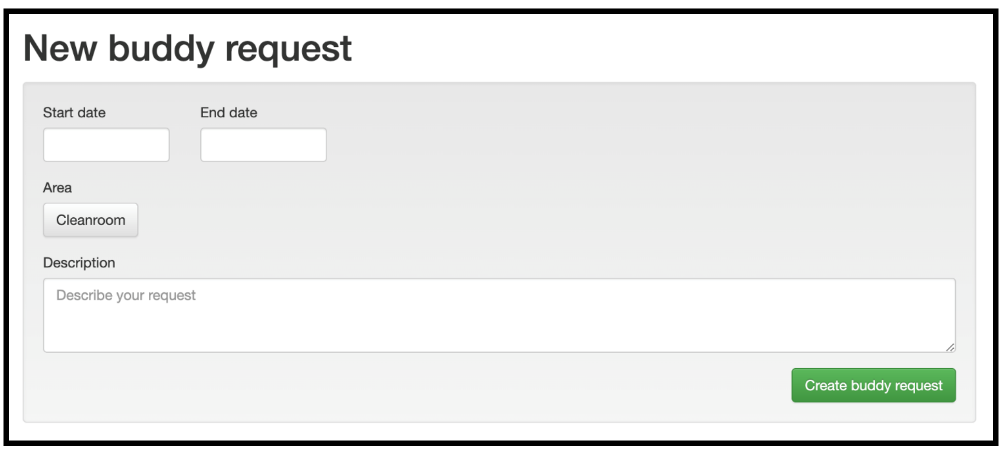


Figure 8.4: *Buddy board new request dialog*

- Click in the Start date dialog and click the start date on the calendar pop-up (Figure 8.5).

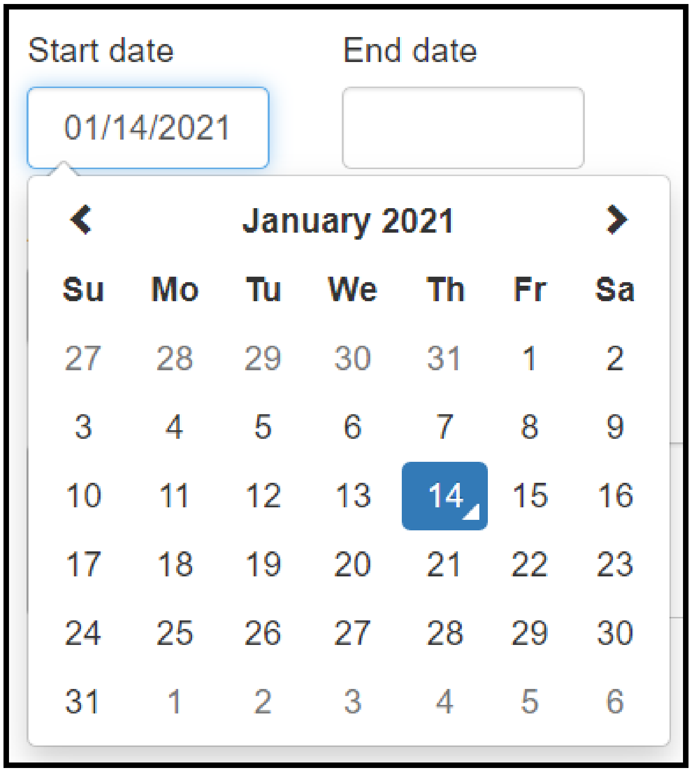


Figure 8.5: *Buddy board start date*

- Click in the End date dialog and click the end date on the calendar pop-up (Figure 8.6).

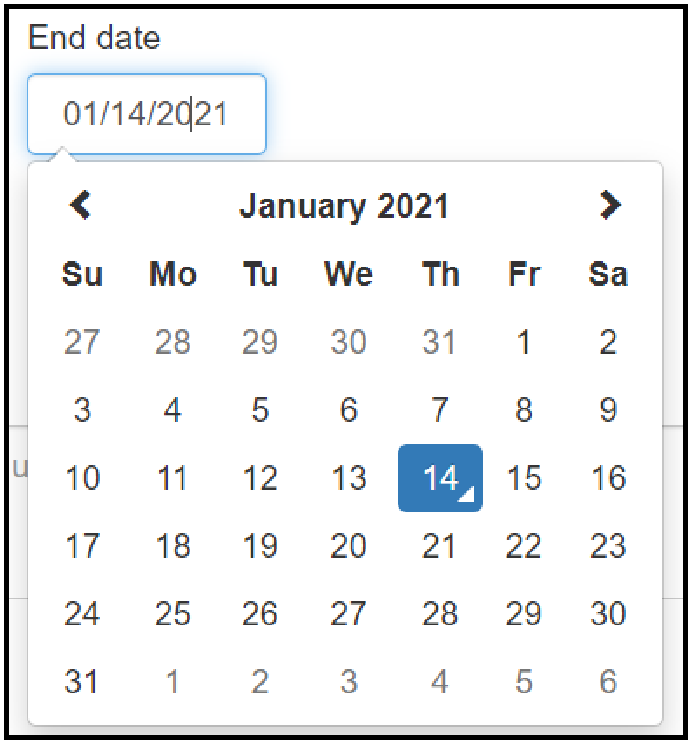


Figure 8.6: *Buddy board end date*

- If you have access to multiple areas that use the buddy system, click the area you are looking for a buddy. Otherwise, your area is automatically selected (Figure 8.7).

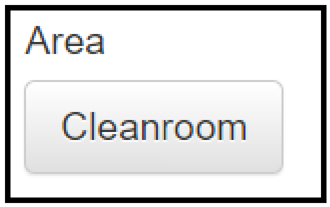


Figure 8.7: *Buddy board area button*

- Enter a description that includes details another user would need to determine if they want to join your buddy group (Figure 8.8).

Figure 8.8: *Buddy board description*

- Click create buddy request button (Figure 8.9).

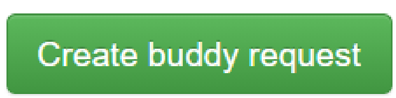


Figure 8.9: *Buddy board create request button*

- Your request will be created, and the page will return to the buddy board.

- All users with preferences set to see new buddy requests will see a notification icon next to requests menu on the navigation bar (Figure 8.10).

Figure 8.10: *Requests navigation bar notification*

8.1.2.3 Edit or delete your request

- Only the owner of a request can edit or delete the request.
- Once there is a reply, the request can't be edited or deleted.
- Click the edit button to edit the request (Figure 8.11).

Figure 8.11: *Buddy board edit request button*

  - All of the fields entered to create the request can be edited.
  - Click save changes when finished (Figure 8.12).

Figure 8.12: *Buddy board save changes button*

- Click the delete button to delete the request (Figure 8.13).

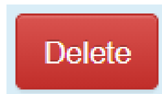


Figure 8.13: *Buddy board delete request button*

  - The request will be deleted without further input.

8.1.2.4 Reply to a request

- Find a request in the time frame of interest (Figure 8.14).

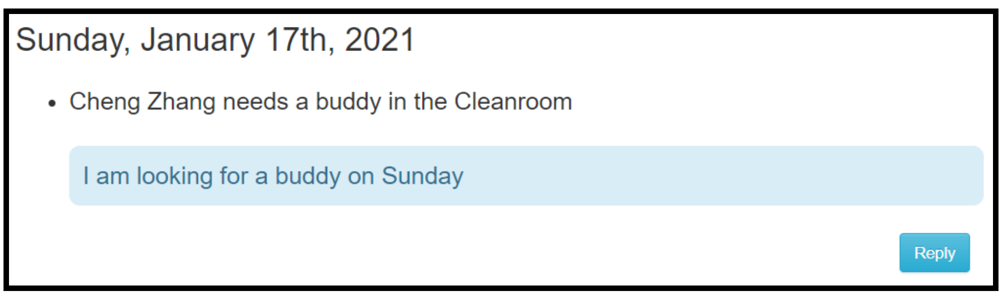


Figure 8.14: *Buddy board request*

- Click the reply button (Figure 8.15).

Figure 8.15: *Buddy board reply button*

- Enter a message in the dialog to respond to the initiator (Figure 8.16).

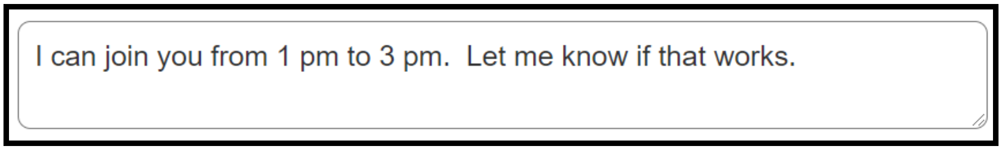


Figure 8.16: *Buddy board reply dialog*

- Click send to post your reply (Figure 8.17).

Figure 8.17: *Buddy board send reply button*

- All users with preferences set to see buddy request replies that they replied to will see a notification icon next to the buddy board menu on the navigation bar (Figure 8.18).

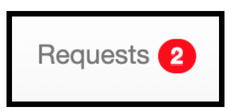


Figure 8.18: *Requests navigation bar notification*

- All users with preferences set to receive emails for buddy request replies that they replied to will receive an email notification

8.1.3 Mobile device buddy board page

There are no mobile device views for the buddy board page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

8.1.4 Buddy board page customizations

The tab title and description can be customized in Customization → Buddy requests settings, see subsection 41.17.2.

8.2 Access requests

The access requests feature is a system that enables facility users to temporarily request access to an area they don't typically have access to at certain times. Most often this would be used to request after-hours access to a lab/cleanroom.

To enable the access requests, you must first enable it on a physical access level. See Detailed administration → Physical access level section 43.32 and by setting at least one facility manager in the Detailed administration → Users section 43.71.

8.2.1 Web address

The access requests page is accessible at site-address/user_requests/access/. The page can also be accessed from the navigation bar menu item "Requests".

8.2.2 Usage

8.2.2.1 Open the access requests

Click the Requests then on the Access requests tab to access the access requests (by default when clicking on Requests it will display the access requests tab). The page shows a new request button in the right upper corner, instructions, and the current list of access requests grouped by status. Possible statuses are: Pending, Approved, Denied and Expired (Figure 8.19).

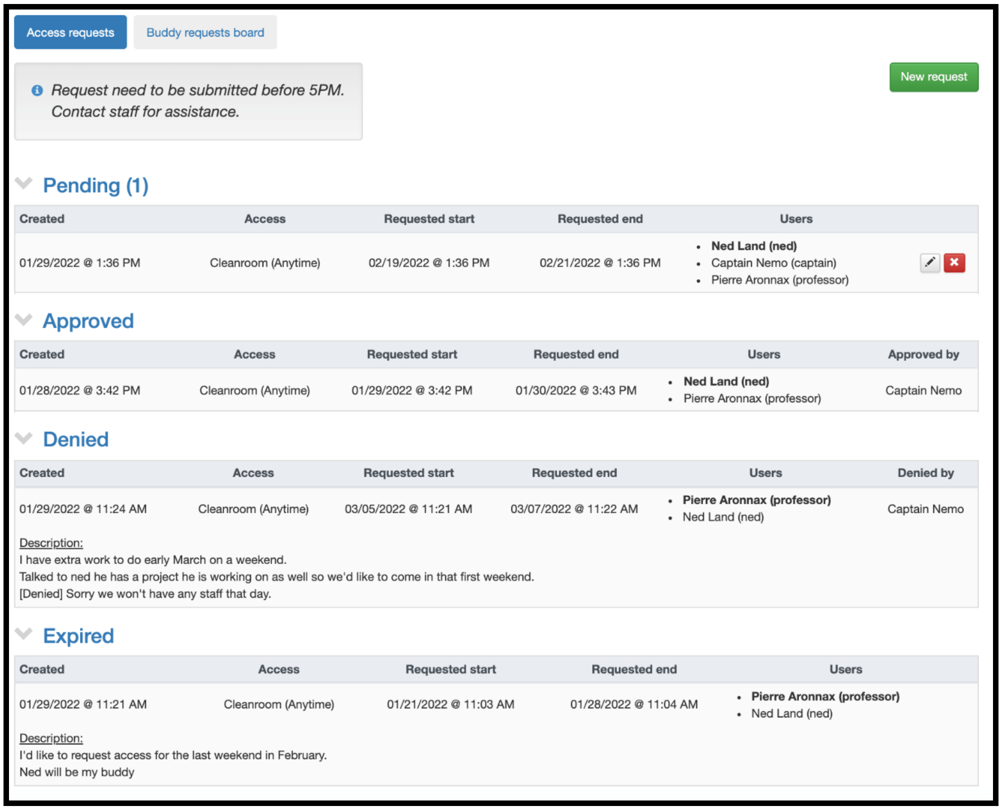


Figure 8.19: *Access requests display*

8.2.2.2 Create a new request

To create a new access request:

- Click the New request button (Figure 8.20).

Figure 8.20: *Access request new request button*

- The new request page will open (Figure 8.21).

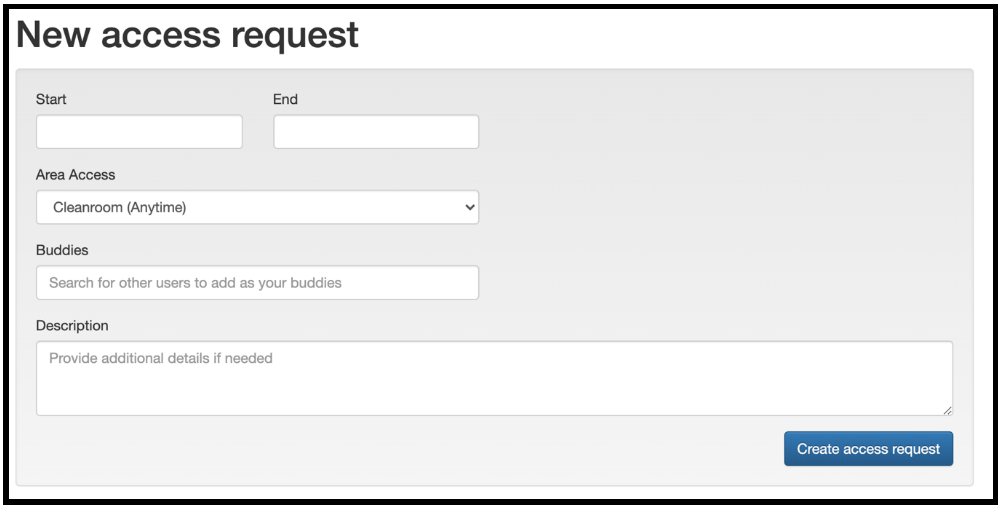


Figure 8.21: *Access request new request dialog*

- Click in the Start text field and pick the start date and time on the calendar pop-up (Figure 8.22).

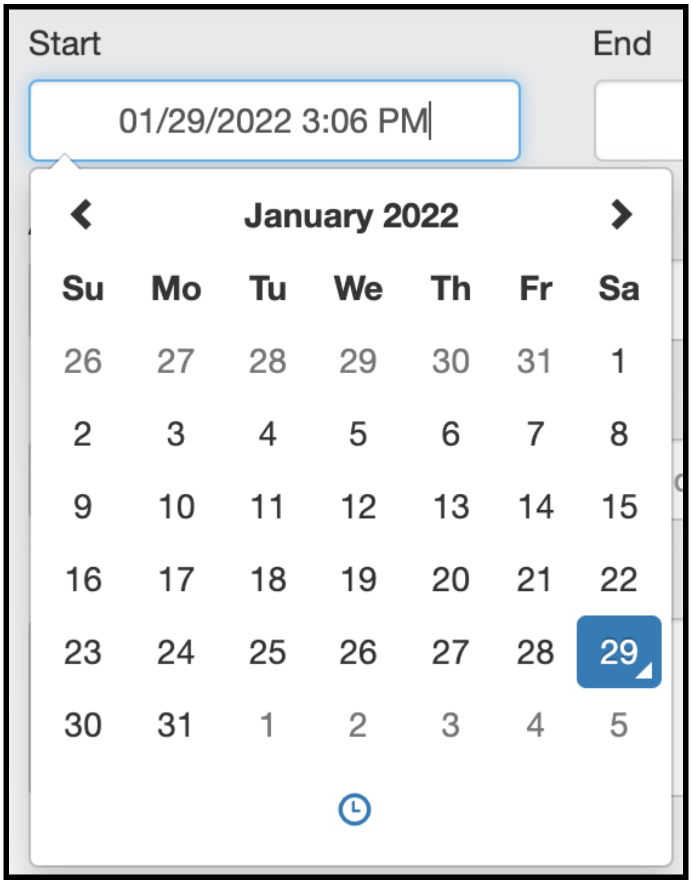


Figure 8.22: *Access request start date and time*

- Click in the End text field and pick the end date and time on the calendar pop-up (Figure 8.23).

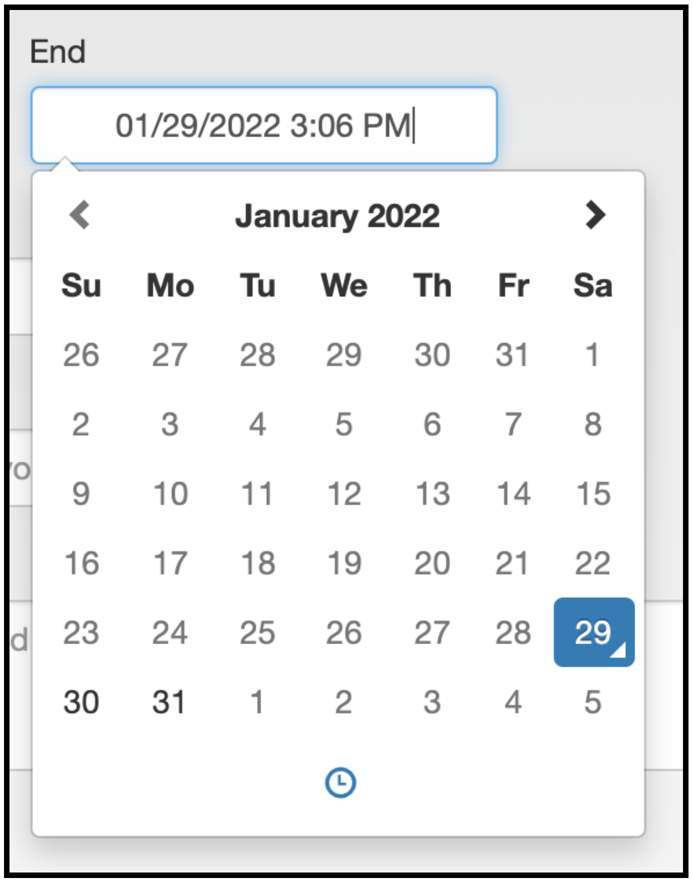


Figure 8.23: *Access request end date and time*

- If you have set multiple physical access levels that users can request, click the Area Access drop down you are looking to request access for. Otherwise, your area access is automatically selected (Figure 8.24).

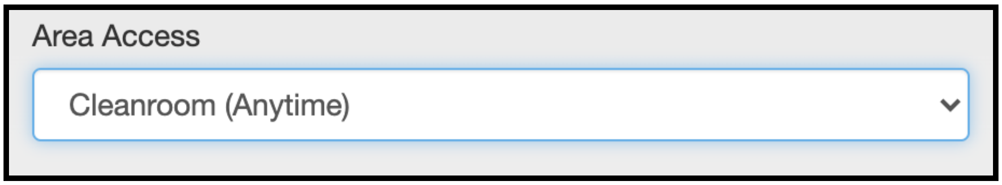


Figure 8.24: *Access request area access dropdown*

- Click on the Buddies text field and start typing the name of the buddy you would like to add to your request. Click on the name to add the buddy (Figure 8.25).

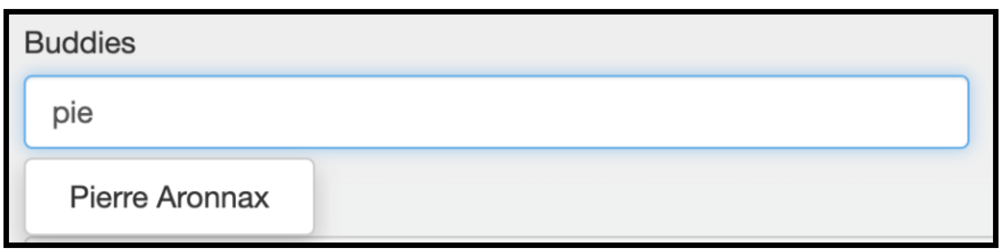


Figure 8.25: *Access request add buddies*

- The buddy's name will appear in the field next to the search field. Click on the cross next to the buddy's name to remove the buddy (Figure 8.26).

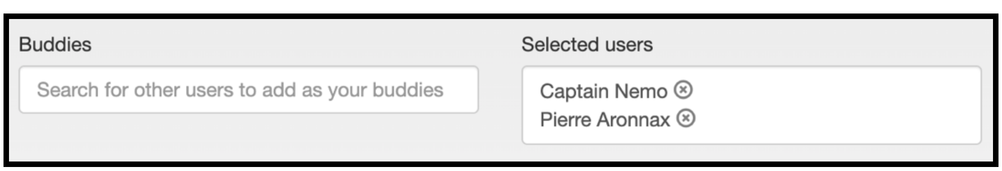


Figure 8.26: *Access request remove buddies*

- Optionally you can enter a description that includes details the facility manager would need to know about your request (Figure 8.27).

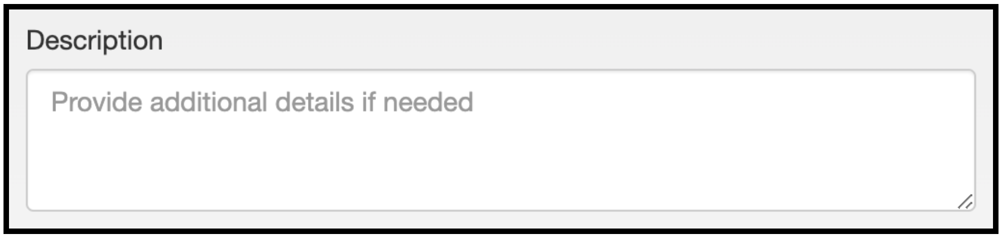


Figure 8.27: *Access request description*

- Click create access request button (Figure 8.28).

Figure 8.28: *Access request create request button*

- Your request will be created, and the page will return to the access requests page.
- All users included in the request and facility managers will receive an email confirmation that the request was received. Additionally, they will see a notification icon next to requests menu on the navigation bar (Figure 8.29).

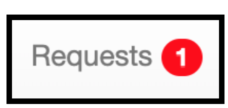


Figure 8.29: *Requests navigation bar notification*

8.2.2.3 Edit or delete your request

- Only the owner of a request can edit or delete the request.
- Once the status is approved, denied, or expired, the request can't be edited or deleted.
- Click the edit button to edit the request (Figure 8.30).

Figure 8.30: *Access request edit request button*

  - All the fields entered to create the request can be edited.
  - Click save changes when finished (Figure 8.31).

Figure 8.31: *Access request save changes button*

- All users and facility managers will receive an email notification that the request was updated as well as a notification icon.
- Click the delete button to delete the request (Figure 8.32).

Figure 8.32: *Access request delete request button*

- A confirmation message will popup asking you to confirm the action before the request is deleted.

8.2.2.4 Approve/deny requests (Facility managers only)

- Find a pending request (Figure 8.33).

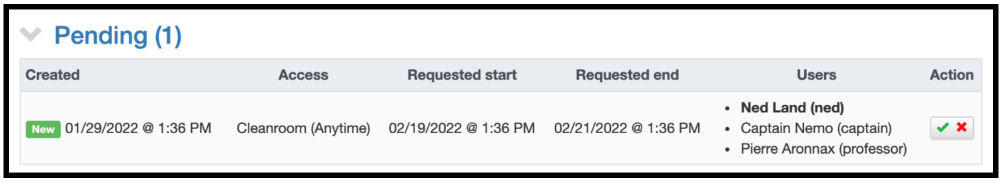


Figure 8.33: *Access requests pending*

- Click the review button (Figure 8.34).

Figure 8.34: *Access requests approve review button*

- Edit any field of the access request. It is recommended to add a message to the request description to explain the changes (Figure 8.35).

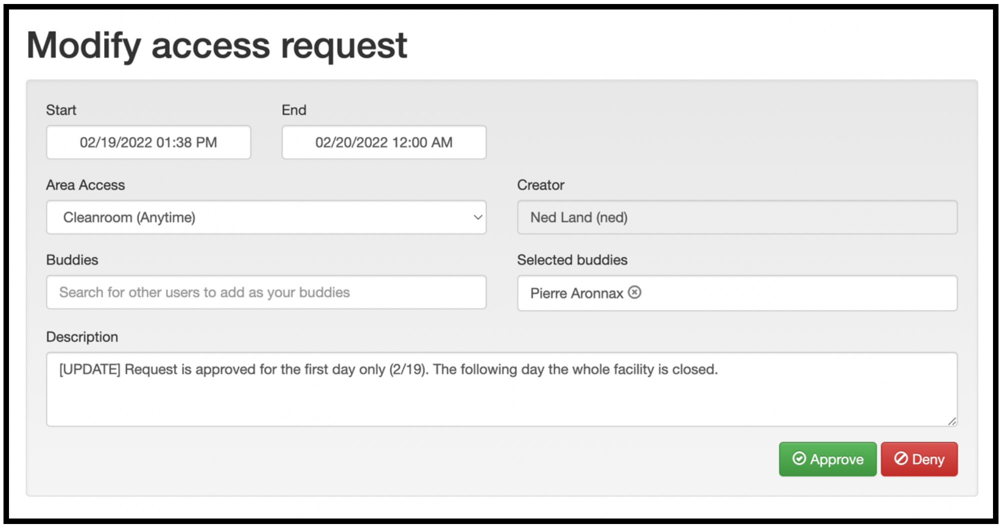


Figure 8.35: *Access request approve/deny dialog*

- Click approve or deny (Figure 8.36).

Figure 8.36: *Access request approve/deny buttons*

- A confirmation dialog will ask to confirm the choice. Upon confirmation, the user will be redirected to the access requests page.
- All users included in the request and facility managers will receive an email confirmation of the changes and new status of the request.

- Upon approval, a temporary physical access record giving access to the area to all the users included in the request, starting at the start time of the request, and ending at the end time of the request. Temporary physical accesses are discussed in the Detailed administration → Temporary physical access section 43.60.

8.2.2.5 Weekend access

The access requests feature comes with a weekend access optional feature. An email can be sent to a customizable list of emails when users are expected to be (or not be) in the facility during weekends. To enable the feature, the weekend access emails setting needs to be set in Customization → Access requests settings (subsection 41.17.1) as well as the user office email address and the weekend email access template in Customization → Weekend access notification email, see subsection 41.5.34. This feature also needs to be set through a timed service job as described in the NEMO Timed Services section 54.3.

There are 2 cases when the email will be sent:

1. When an approved request's time is overlapping the current weekend time, an email will be sent to inform the emails set in Customization → Access requests settings (see subsection 41.17.1) as well as facility managers that there will be users in the facility this coming weekend. For example, if the cutoff date and time is set to Friday 5 pm and a request is approved before that (or anytime if the cutoff date and time are not set), then the email will be sent with a weekend_access variable set to "true".

2. When no requests overlapping the current weekend time are approved before the cutoff day and time set in Customization – Access requests settings subsection 41.17.1, an email will be sent at the cutoff date and time to inform the emails set in Customization → Access requests settings (see subsection 41.17.1) as well as the facility managers that no users will be in the facility this coming weekend.

For example, if the cutoff date and time is set to Friday 5 pm and by that day and time there are no approved requests with time overlapping the current weekend, then the email will be sent with a weekend_access variable set to "false". If the cutoff day and time are not sent, the email will not be sent.

8.2.3 Mobile device access requests page

There are no mobile device views for the access requests page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

8.2.4 Access requests page customizations

The tab title, description, minimum number of users in a request, maximum requests to display and weekend access details can be set in Customization → Access requests settings, see subsection 41.17.1.

8.3 Adjustment requests

The adjustment requests feature is a system that enables users to contest certain charges. To enable adjustment requests, you must have at least one user with the facility manager role, and you must enable it in Customization – Adjustment requests settings, see subsection 41.1.

8.3.1 Web address

The adjustment requests page is accessible at site-address/user_requests/adjustment/. The page can also be accessed from the navigation bar menu item "Requests".

8.3.2 Usage

8.3.2.1 Open the adjustment requests

Click the Requests then on the Adjustment requests tab to access the adjustment requests. The page shows a new request button in the right upper corner, instructions, and the current list of adjustment requests grouped by status. Possible statuses are: Pending, Approved and Denied (Figure 8.37).

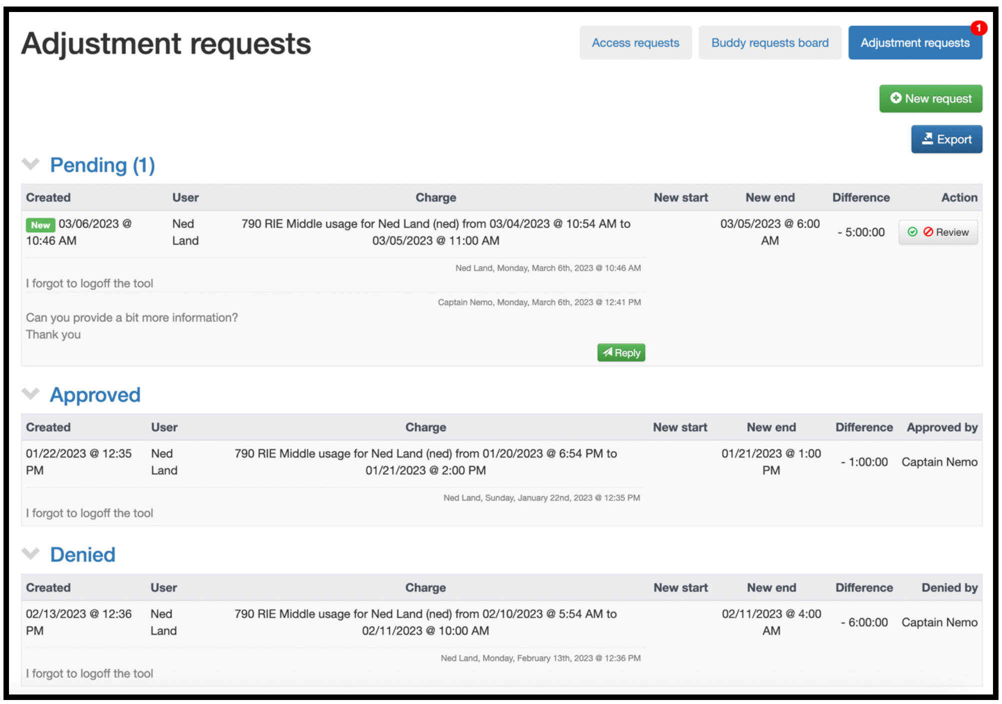


Figure 8.37: *Adjustment requests display*

8.3.2.2 Create a new request

There are two ways to create a new adjustment request, from the usage page and from the requests page.

From the Usage page:

- Click the Request an adjustment button (Figure 8.38).

Figure 8.38: *Adjustment requests request an adjustment button*

From the Requests main menu item:

- Click the New request button (Figure 8.39).

Figure 8.39: *Adjustment requests new request button*

- The new request page will open (Figure 8.40).

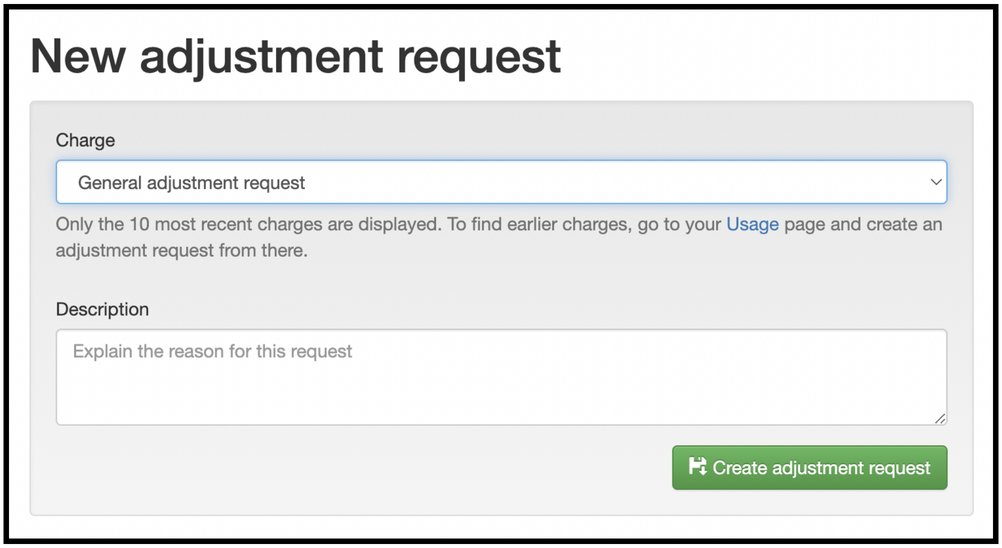


Figure 8.40: *Adjustment requests new request dialog*

- Click in the "Charge" dropdown menu and pick the charge you would like to request an adjustment for, or select "General adjustment request" (Figure 8.41).

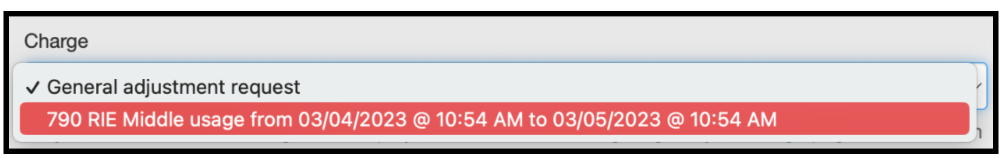


Figure 8.41: *Adjustment requests charge selection*

- If a charge is selected, the user will have the option to change the quantity - for consumable charges - (Figure 8.42), the start and end date and time - for tool usage, area access, staff time and missed reservation charges (Figure 8.43) or to ask for the charge to be waive entirely (Figure 8.44).

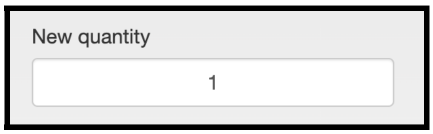


Figure 8.42: *Adjustment requests quantity*

Figure 8.43: *Adjustment requests start and end date and time*

Figure 8.44: *Adjustment requests waive charge*

- Click in the New start text field and pick the new start date and time on the calendar pop-up, or leave it as-is (Figure 8.45).

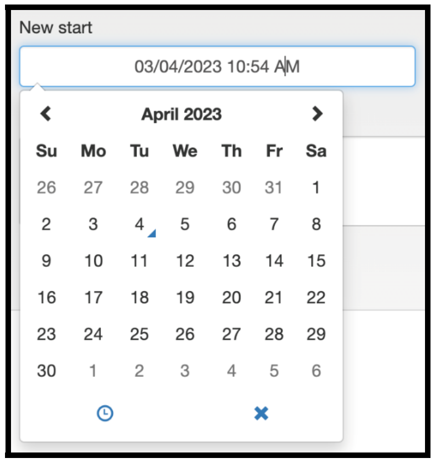


Figure 8.45: *Adjustment requests new start date and time*

- Click in the New end text field and pick the new end date and time on the calendar pop-up, or leave it as-is (Figure 8.46).

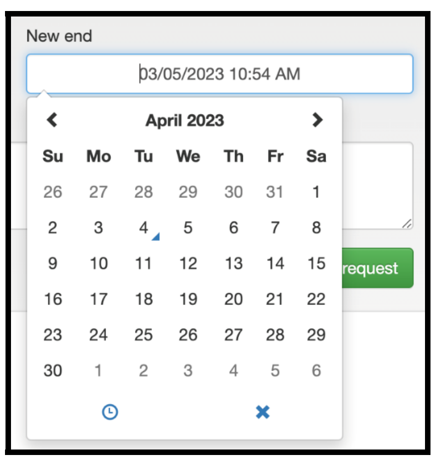


Figure 8.46: *Adjustment requests new end date and time*

- Enter a description that includes details the facility manager would need to know about your request (Figure 8.47).

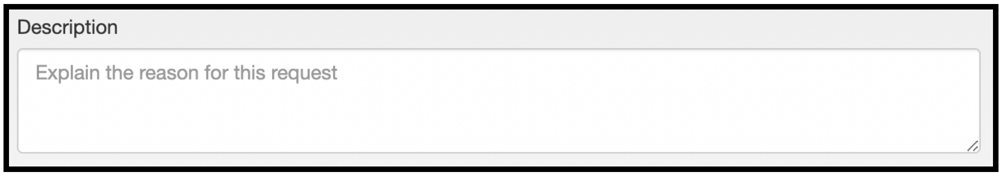


Figure 8.47: *Adjustment requests description*

- Click the Create adjustment request button (Figure 8.48).

Figure 8.48: *Adjustment requests create request button*

- Your request will be created, and the page will return to the adjustment requests page.
- The user and facility managers will receive an email confirmation that the request was received. Additionally, facility managers will see a notification icon next to requests menu on the navigation bar (Figure 8.49).

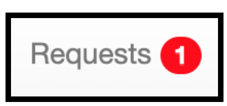


Figure 8.49: *Requests navigation bar notification*

8.3.2.3 Edit or delete your request

- Only the owner of a request can edit or delete the request.
- Once the status is approved, or denied, the request can't be edited or deleted.
- Click the edit button to edit the request (Figure 8.50).

Figure 8.50: *Adjustment requests edit request button*

  - All the fields entered to create the request can be edited.
  - Click save changes when finished (Figure 8.51).

Figure 8.51: *Adjustment requests save changes button*

- The user and facility managers will receive an email notification that the request was updated as well as a notification icon.
- Click the delete button to delete the request (Figure 8.52).

Figure 8.52: *Adjustment requests delete request button*

- A confirmation message will popup asking you to confirm the action before the request is deleted.

8.3.2.4 Reply/Approve/deny requests (Reviewers only)

- Find a pending request (Figure 8.53).

Figure 8.53: *Adjustment requests pending*

- [Optional] Click the reply button to start a conversation with the user prior to reviewing the request (Figure 8.54).

Figure 8.54: *Adjustment requests reply button*

- To approve/deny a request, click the review button (Figure 8.55).

Figure 8.55: *Adjustment requests approve deny button*

- Edit any field of the adjustment request. An addition field is provided for additional feedback/instructions (sent to the user if the request is denied, sent to the user office if the request is approved) (Figure 8.56).

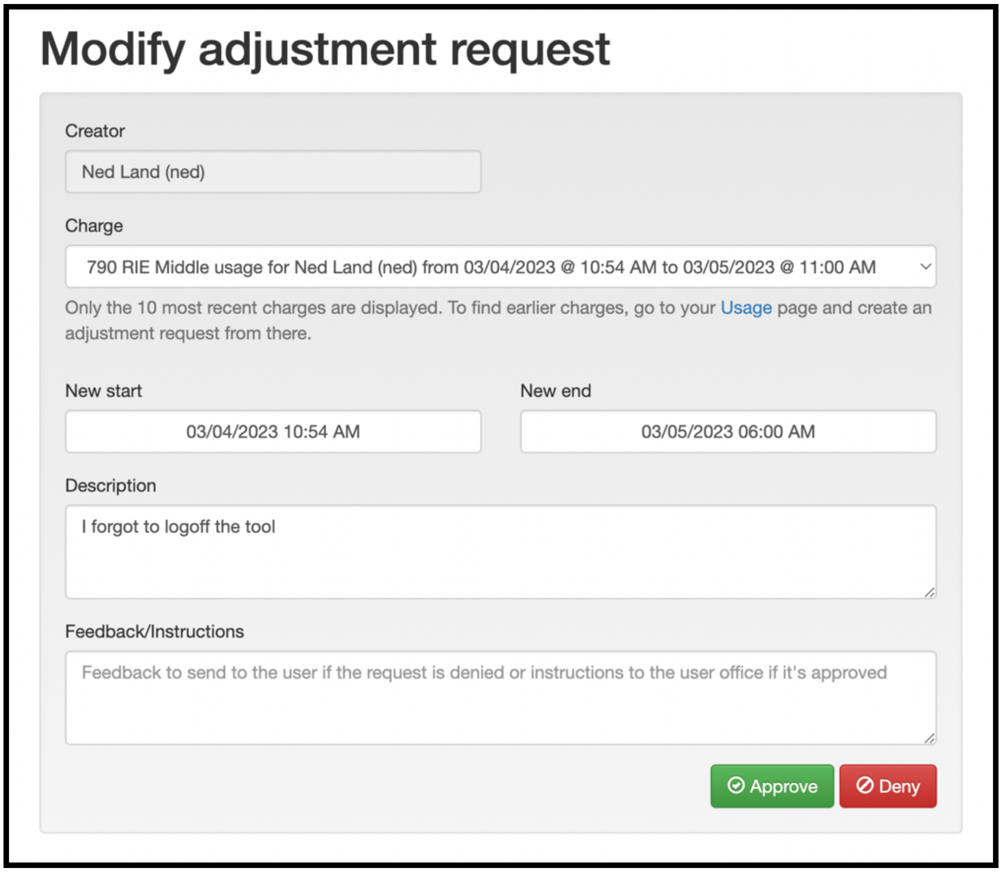


Figure 8.56: *Adjustment requests approve/deny dialog*

- Click approve or deny (Figure 8.57).

Figure 8.57: *Adjustment requests approve/deny buttons*

- A confirmation dialog will ask to confirm the choice. Upon confirmation, the user will be redirected to the adjustment requests page.
- The user and facility managers will receive an email confirmation of the changes and of the new status of the request.
- Upon approval, an additional email will be sent to the User Office containing the details of the request as well as the additional instructions if provided.

8.3.2.5 Adjust charge (Reviewers only)

- If enabled in Customization, charges can be adjusted directly in NEMO by the reviewers (i.e. the charge record itself will be changed). This can be done when reviewing the adjustment request by clicking the “Approve and adjust” button (Figure 8.58) or from the list of approved adjustment requests by clicking the “Adjust charge” button (Figure 8.59).

Figure 8.58: *Adjustment requests adjust charge review button*

Figure 8.59: *Adjustment requests adjust charge button*

8.3.2.6 Mark as applied (Reviewers and User office only)

- Find an approved request (Figure 8.60).

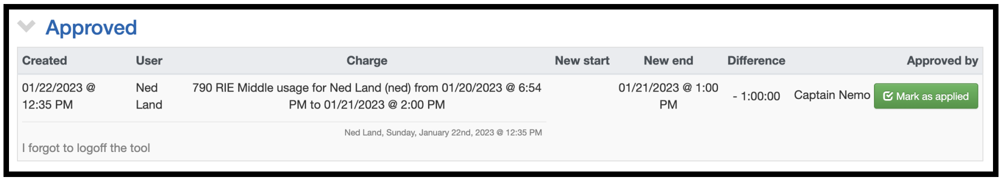


Figure 8.60: *Adjustment requests approved*

- Click the "Mark as applied" button to mark the adjustment as applied (Figure 8.61). This is particularly useful if the adjustment was made outside of NEMO, to keep track of it here.

Figure 8.61: *Adjustment requests mark as applied button*

8.3.3 Mobile device adjustment requests page

There are no mobile device views for the adjustment requests page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

8.3.4 Adjustment requests page customizations

The tab title, description, maximum requests to display and weekend access details can be set in Customization $\rightarrow$ Adjustment requests settings, see section 41.1.

Additionally, facility managers can limit tools for which they receive adjustment requests notifications, in User Preferences $\rightarrow$ Adjustment requests, see subsection 19.1.5.

8.4 Staff assistance requests

The staff assistance request feature is a simple task/ticket system that enables facility users to ask staff for help.

To enable staff assistance requests, you must first enable it in Customization, see section **??**.

8.4.1 Web address

The staff assistance requests page is accessible at site-address/user_requests/staff_assistance/. The page can also be accessed from the navigation bar menu item "Requests".

8.4.2 Usage

8.4.2.1 Open the staff assistance requests

Click the Requests then on the staff assistance tab to access the staff assistance requests. The page shows a new request button in the right upper corner for non-staff users, instructions, and the current list of staff assistance requests and replies (Figure 8.62).

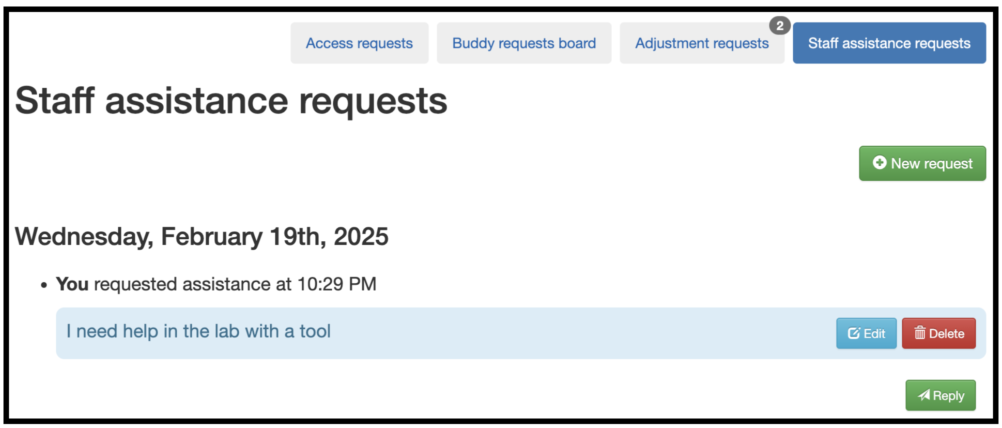


Figure 8.62: *Staff assistance request display*

8.4.2.2 Create a new request

To create a new staff assistance request:

- Click the New request button (Figure 8.63).

Figure 8.63: *Staff assistance request new request button*

- The new request popup will open (Figure 8.64).

Figure 8.64: *Staff assistance requests new request dialog*

- Enter a description that includes as much detail as possible.
- Click send button (Figure 8.65).

Figure 8.65: *Staff assistance request send button*

- Your request will be created, and the page will return to the staff assistance requests page.
- All staff users will see a notification icon next to requests menu on the navigation bar (Figure 8.66).

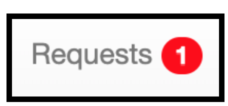


Figure 8.66: *Requests navigation bar notification*

8.4.2.3 Edit or delete your request

- Only the owner of a request can edit or delete the request.
- Once there is a reply, the request can't be edited or deleted.
- Click the edit button to edit the request (Figure 8.67).

Figure 8.67: *Staff assistance requests edit request button*

  - All of the fields entered to create the request can be edited.
  - Click send when finished.

- Click the delete button to delete the request (Figure 8.68).

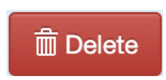


Figure 8.68: *Staff assistance request delete request button*

  - The request will be deleted without further input.

8.4.2.4 Reply to a request

- Find a request in the list.
- Click the reply button (Figure 8.69).

Figure 8.69: *Staff assistance request reply button*

- Enter a message in the dialog to respond to the initiator (Figure 8.70).

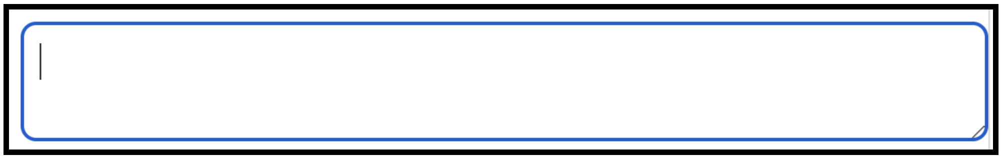


Figure 8.70: *Staff assistance request reply dialog*

- Click send to post your reply.
- All staff members will see a notification icon next to the staff assistance menu on the navigation bar.
- All users with preferences set to receive emails for staff assistance request replies that they replied to will receive an email notification

8.4.3 Mobile device staff assistance request page

There are no mobile device views for the staff assistance request page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

8.4.4 Staff assistance requests page customizations

The tab title and description can be customized in Customization → Staff assistance settings, see subsection 41.17.3.

CHAPTER 9

Jumbotron

The jumbotron is similar to the status dashboard but provides an integrated page to display user occupancy, tools in use, and any alerts or outages (Figure 9.1).

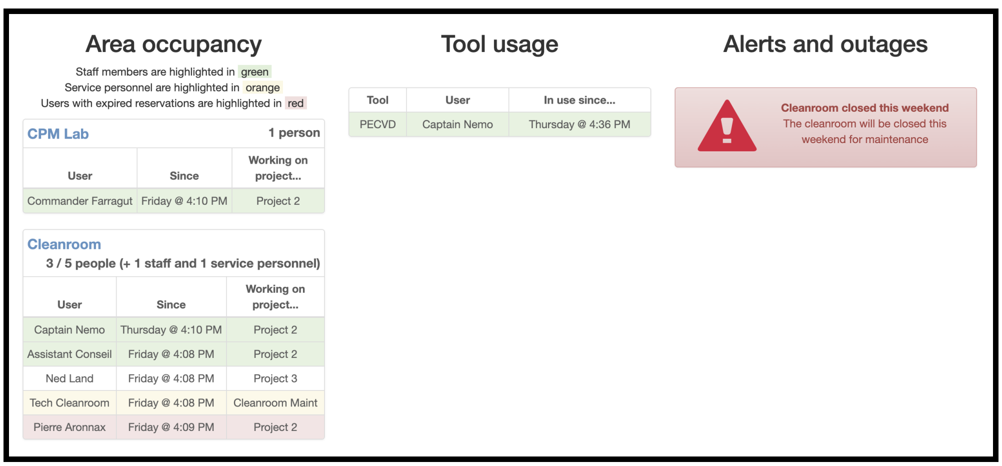


Figure 9.1: *Jumbotron display*

9.1 Usage

The intent of this page is to run continuously on a monitor.

- Area occupancy information will only be displayed if areas have been defined.
  - This section shows all users that are currently logged into all areas. Staff members are highlighted in green and service personnel are highlighted in orange, so they stand out. Each area will list the number of people in the area if it is greater than 1. Staff and service personnel are listed separately if the area is configured not to include them in the occupancy count.
  - When area reservations are in use, users with expired reservations are highlighted in red.
- Tool usage information will only be displayed if tools have been defined.
- Alerts and outages are only displayed if any are present (Figure 9.2).
- An optional watermark can be used on the page to highlight the lab.

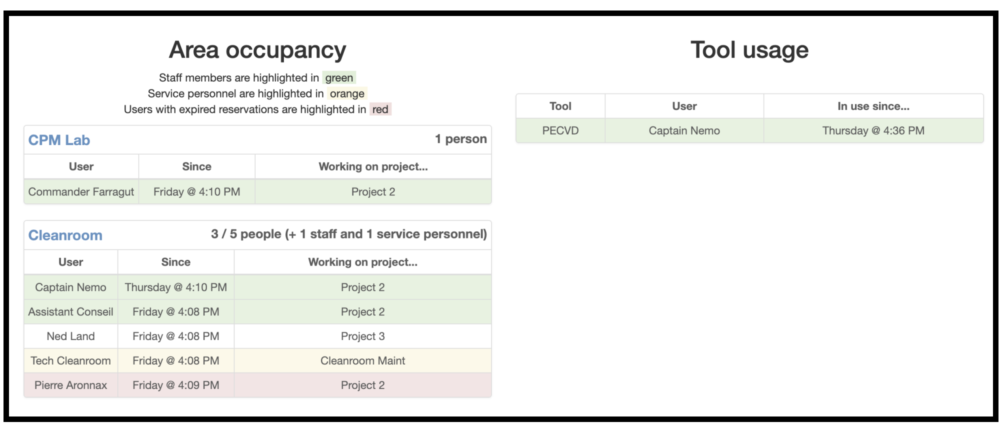


Figure 9.2: *Jumbotron with no alerts or outages*

If there is no area occupancy or tool usage, then not-in-use messages are displayed (Figure 9.3).

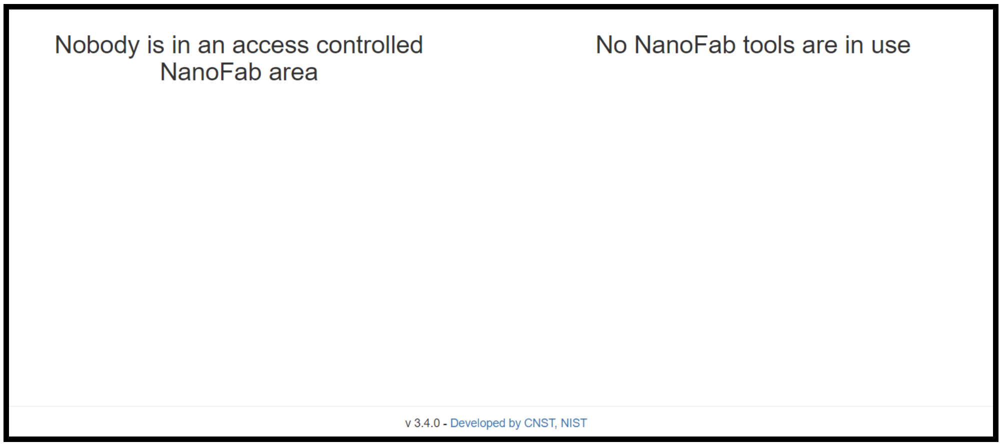


Figure 9.3: *Jumbotron not in use messages*

The page automatically refreshes periodically to keep the information current. If NEMO has gone offline and does not respond to a refresh request, the page will display “NEMO is offline” (Figure 9.4).

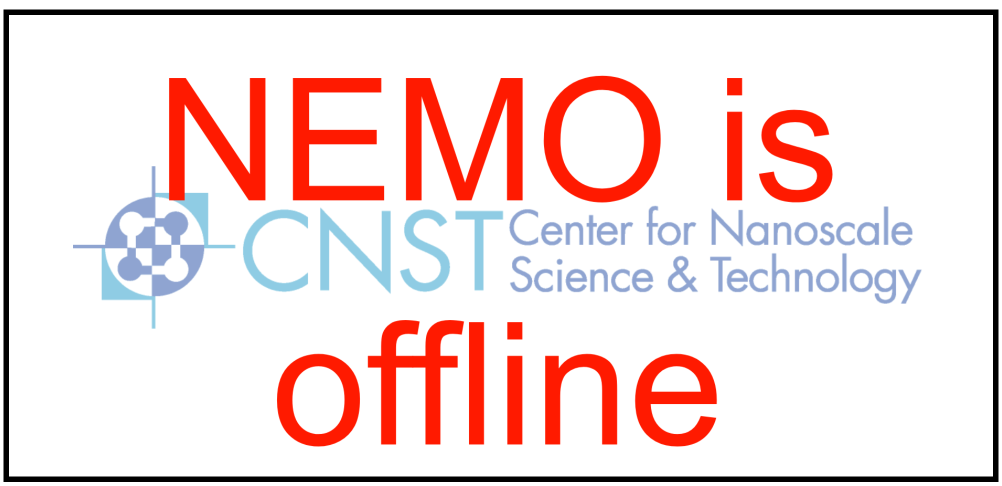


Figure 9.4: *Jumbotron NEMO offline*

9.2 Web address

The jumbotron page is accessible at site-address/jumbotron/. The page is not accessible from the navigation bar and must be either directly addressed or have a quick link created in the landing page.

9.3 Mobile device jumbotron

There are no mobile device views for the jumbotron page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

9.4 Jumbotron customizations

9.4.1 Background watermark

The jumbotron can display a background watermark image. The jumbotron watermark is configured through the Customizations $\rightarrow$ Jumbotron watermark, see subsection 41.5.6.

9.4.2 Jumbotron refresh rate

The jumbotron page automatically refreshes every 10 seconds which updates the current area occupancy, tool usage information, alerts, and outages. To change the update interval, edit the jumbotrol.html and change the setInterval constant (in milliseconds) in the on_load function.

CHAPTER 10

Safety items

The Safety items page provides safety information for users (Figure 10.1). Safety items and safety categories can be added in Detailed administration → Safety items (see section 43.44) and Detailed administration → Safety categories (see section 43.42), respectively.

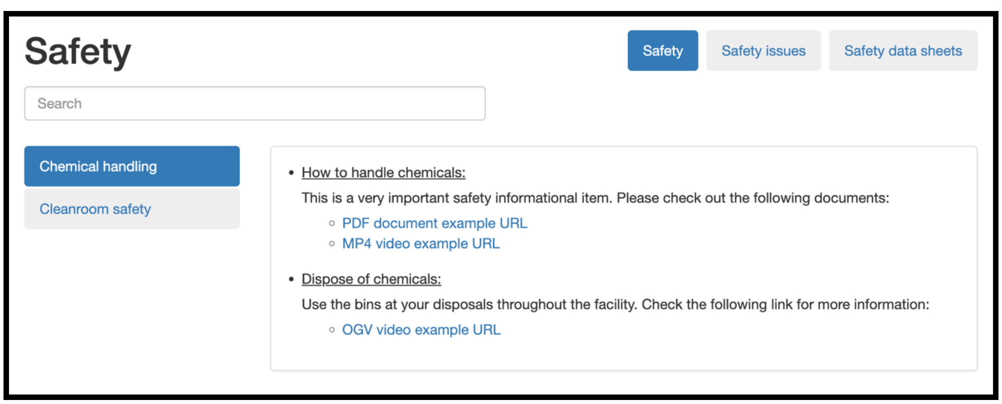


Figure 10.1: *Safety items page*

10.1 Usage

Click on categories on the left-hand side to see Safety items related to that category (Figure 10.2).

Figure 10.2: *Safety items categories menu*

When looking at safety items, click on the document links to open a popup (Figure 10.3).

Figure 10.3: *Safety items open link*

PDF and Video formats (.mp4, .ogv, .webm, .3gp) will be played directly in the popup (Figure 10.4, Figure 10.5).

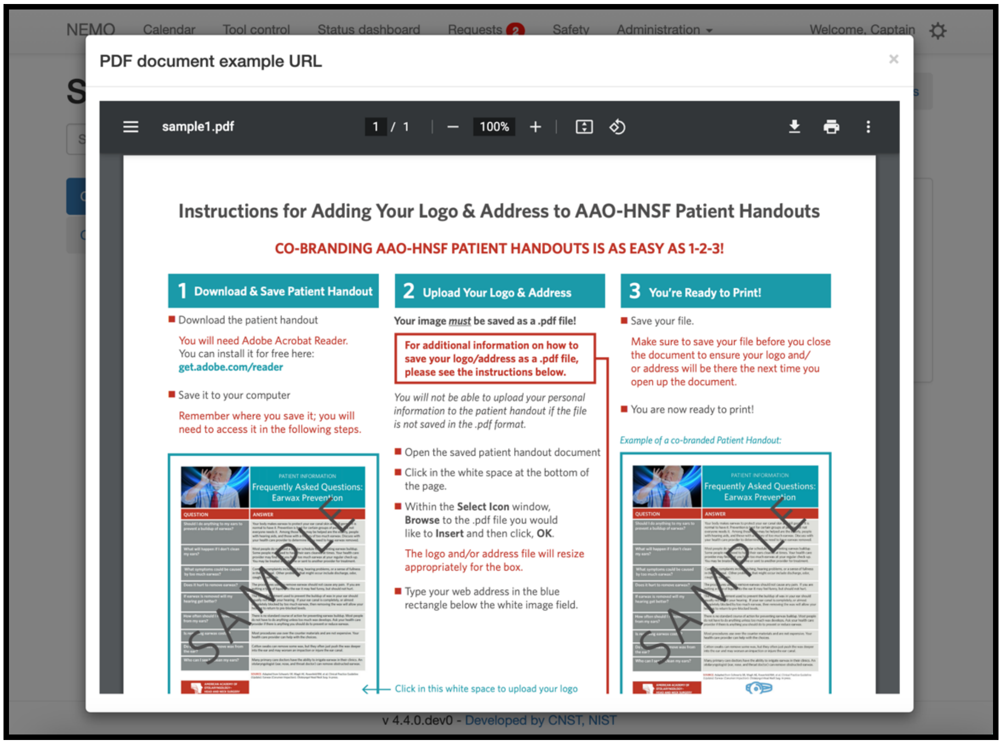


Figure 10.4: *Safety items PDF popup*

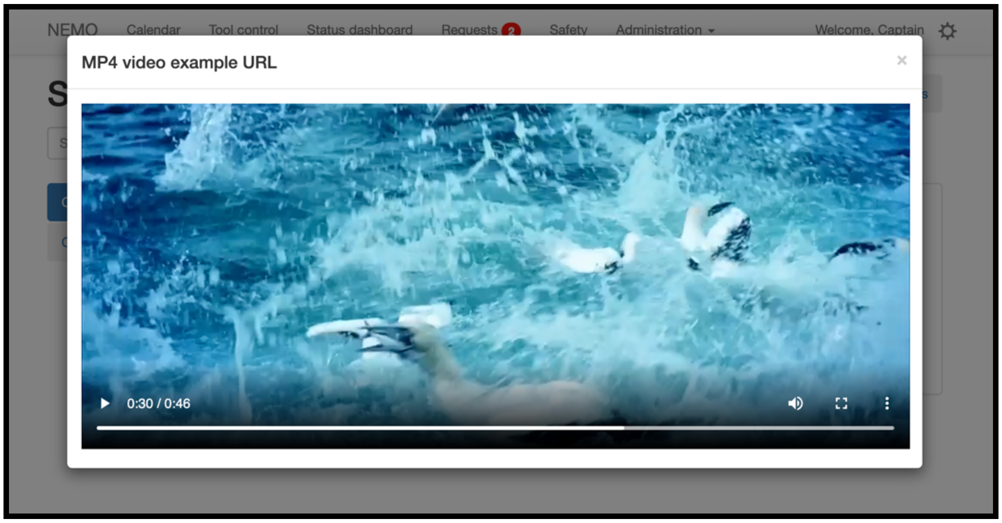


Figure 10.5: *Safety items Video popup*

Other links will initiate a download if the target is a file or redirect the user if the link is a URL (Figure 10.6).

Figure 10.6: *Safety items redirect link*

10.2 Web address

The safety items page is accessible at site-address/safety/. The page is accessible from the navigation bar by clicking the Safety menu item.

10.3 Mobile device safety items page

There are no mobile device views for the safety issues page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

10.4 Safety items customizations

By going to Customization $\rightarrow$ Safety (see section 41.12), you can customize:

- Whether the Safety menu is displayed.
- Whether the Safety items is displayed as a tab.
- Which Safety category view is used (all in one page, or separate on a side menu)

CHAPTER 11

Safety issues

The safety issues page provides users a method to report and view non-emergency issues in the lab and gives staff a method to document progress and resolutions (Figure 11.1). If a user reports a problem with a tool and checks that the problem is also a safety hazard, as described in the Tool control $\rightarrow$ Report a problem section 6.8, a new safety issue will automatically be created here. Users and staff can see current issues and look at closed issues.

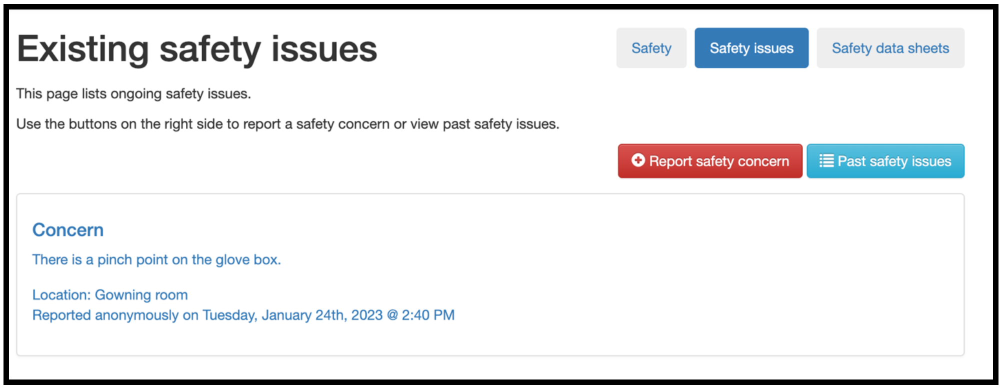


Figure 11.1: *Safety issues page*

11.1 Safety message

NEMO has a default safety message displayed at the top of the safety issues page. It can be customized to specific lab requirements (Figure 11.2). A customized html safety message can be loaded into NEMO through the Customizations → Safety introduction message.

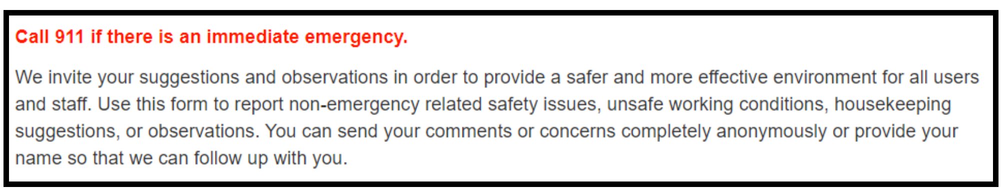


Figure 11.2: *Safety issues page default safety message*

11.2 View resolved safety issues

Safety issues that have been closed can be accessed by clicking the view past safety issues button (Figure 11.3).

Figure 11.3: *Safety issues past issues link*

Clicking the link will open the resolved safety issues page (Figure 11.4).

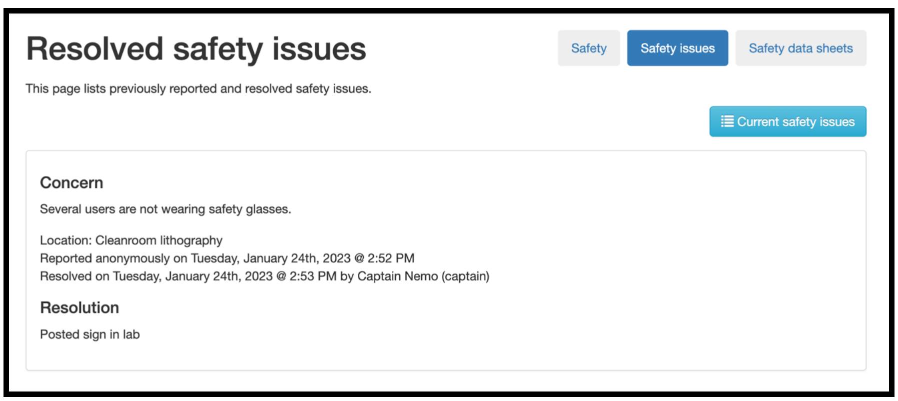


Figure 11.4: *Safety issues resolved issues page*

All resolved issues will be listed with the most recent resolution listed first. If there are not any resolved safety issues to list, the user will be notified with "There are no past issues."

Clicking the current safety issues button will return to the main safety page (Figure 11.5).

Figure 11.5: *Safety issues return to main page*

11.3 Report a new safety issue

New safety issues can be created by any user or staff member. To report a new safety issue, provide a location and a description of your concern (Figure 11.6).

Figure 11.6: *Safety issues report new issue*

Users can select to report issues anonymously if desired and their name will not be recorded with the report (Figure 11.7). However, the staff will not be able to follow up directly with the user about the problem or how it was resolved.

Figure 11.7: *Safety issues report new issue anonymously*

Once all information is correct, click the report button (Figure 11.8).

Figure 11.8: *Safety issues issue report button*

Upon clicking the report button NEMO will:

- Create a new safety issue in the safety issues table of the database as discussed in the Detailed administration $\rightarrow$ Safety Issues section 43.43.
- Send an email to the safety email address using the safety email template. If either are missing, no email will be sent. Safety email address and email template are detailed in the Customization section 41.12.
- Upon success, a confirmation message will appear to verify that the safety issue was received and recorded (Figure 11.9).

Figure 11.9: *Safety issues report confirmation*

11.4 View open safety issues

All open safety issues are listed at the bottom of the page (Figure 11.10).

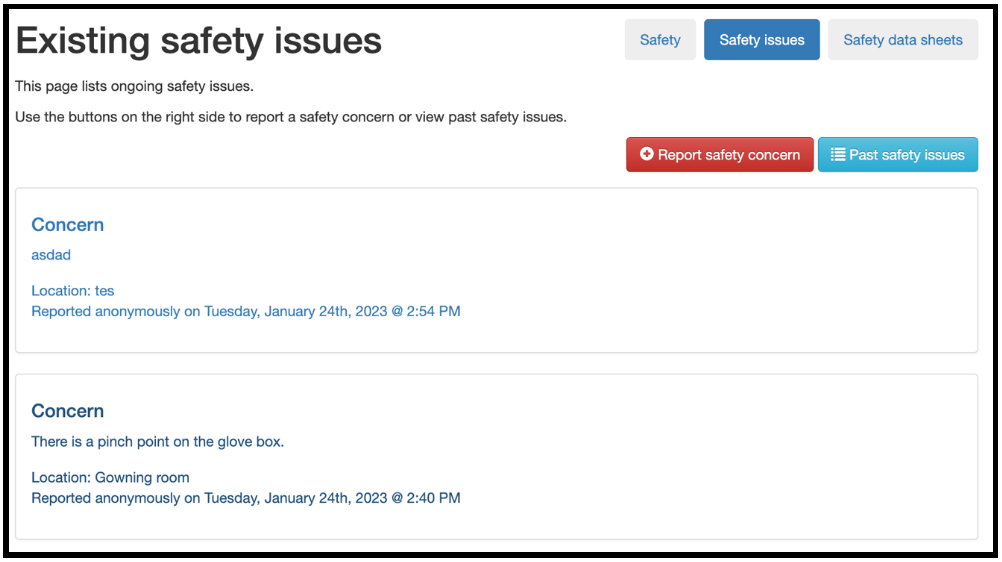


Figure 11.10: *Safety issues open issues*

11.4.1 User view

Each concern will list a description, location, the time and date (Figure 11.11).

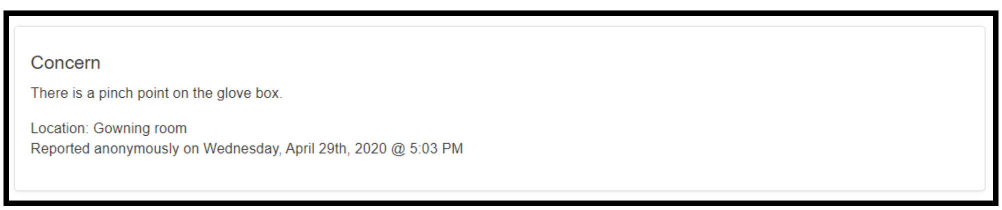


Figure 11.11: *Safety issues open issue user view*

11.4.2 Staff view

The staff view will list a description, location, the time and date, and the user who reported the concern (Figure 11.12). In addition, staff can update a concern by clicking anywhere in the listing box.

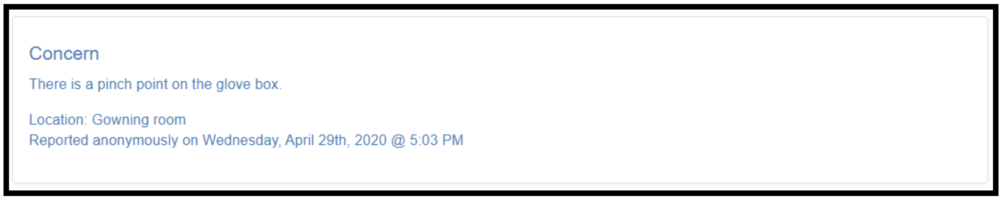


Figure 11.12: *Safety issues open issue staff view*

11.4.3 Hidden issues

Some issues may be hidden from users however staff will still be able to view them (Figure 11.13). Issues hidden from users are notated.

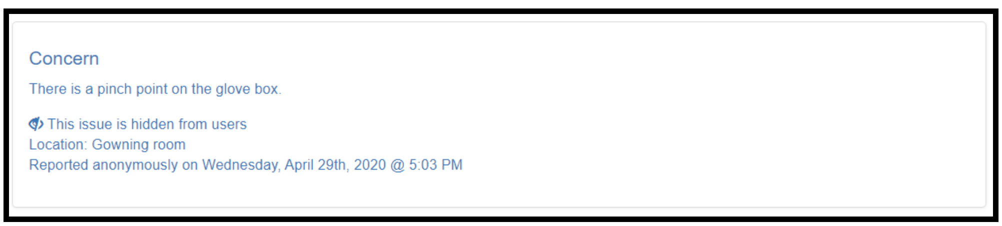


Figure 11.13: *Safety issues issue hidden from user view*

11.4.4 Automatic safety issues

If a safety issue was created automatically with a tool problem report, it will say so (Figure 11.14).

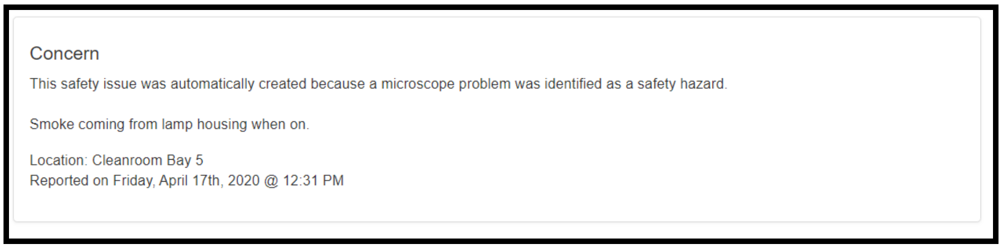


Figure 11.14: *Safety issues report created by tool problem report*

11.4.5 Progress

If a safety has an update but has not been resolved, it will have a progress section that lists the progress made so far (Figure 11.15).

Figure 11.15: *Safety issues issue showing progress*

11.5 Resolve or update a safety issue (staff only)

Staff can resolve an open issue or make progress updates. Clicking anywhere in a concern box will open the update page (Figure 11.16). The update page has check boxes to resolve an issue and hide an issue, a dialog box to enter information, save and abandon update buttons, and a listing of all information to date.

Figure 11.16: *Safety issues issue update page*

If this is the final update and the issue will be closed, check the issue resolved checkbox (Figure 11.17).

Figure 11.17: *Safety issues update issue resolved checkbox*

All issues are visible to users by default, if an issue needs to be hidden from users, uncheck the visible to users' checkbox (Figure 11.18).

Figure 11.18: *Safety issues update issue visible checkbox*

Enter a detailed narrative or the progress to date or the final resolution (Figure 11.19).

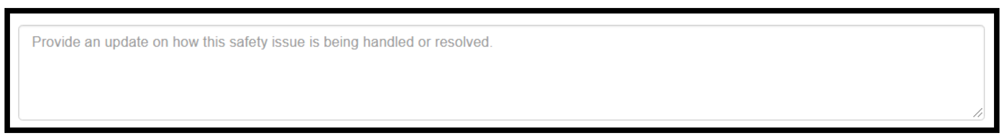


Figure 11.19: *Safety issues update narrative dialog box*

To save, click the save update button (Figure 11.20). After clicking save, the main safety issues page is opened.

Figure 11.20: *Safety issues update save button*

11.6 Notifications (staff only)

When safety alerts are created, the notification status is set for staff members. It automatically expires after one month. If a user accesses a page with a notification within that time, there will be a notification indicating new content since their last visit. The safety notifications are reset upon visiting the safety page. Notifications are detailed in the Detailed administration → Notifications section 43.30.

If the safety issues page has a link on the landing page, a red number that represents the number of new safety issues reported since the user last visited the safety page will appear to the right of the link name (Figure 11.21). Setup details can be found under the Detailed administration → Landing page choices section 43.27.

Figure 11.21: *Landing page safety issues notification*

The next time the safety issues page is visited, any new issues that have been created since the user last visited the safety issues page will have a special “new” icon to highlight the concern (Figure 11.22).

Figure 11.22: *Safety issues page new issues*

11.7 Web address

The safety issues page is accessible at site-address/safety/issues. For example, www.nemo.com/safety/issues. The page is accessible from the navigation bar under Safety.

11.8 Mobile device safety page

There are no mobile device views for the safety issues page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

11.9 Safety page customizations

Whether the Safety issues is displayed as a tab in the Safety page can be customized in Customization → Safety, see section 41.12.

Safety email address and email template are detailed in the Customization chapter 41.

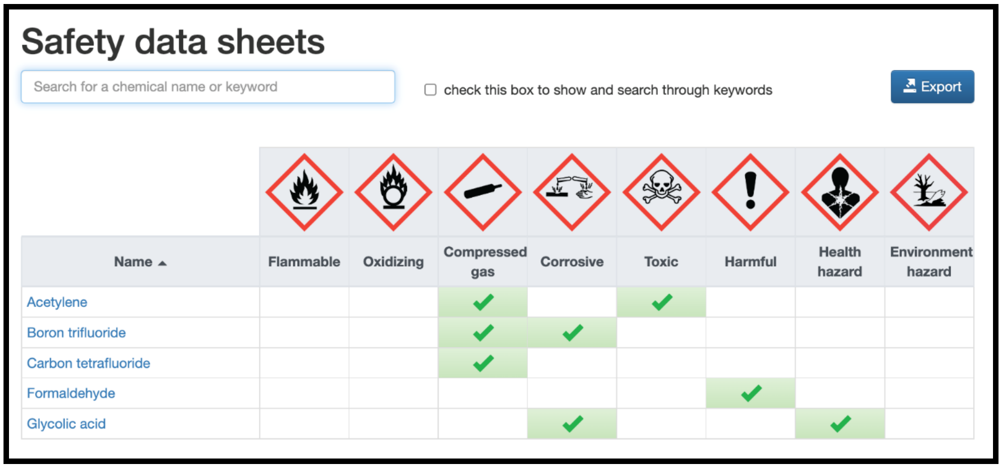
A customized html safety message can be loaded into NEMO through the Customizations → Safety introduction message.

CHAPTER 12

Safety data sheets

The safety data sheet page allows users to check the required safety documentation for chemical and to quickly check which hazard apply to chemicals (Figure 12.1). Chemical hazards are managed in the Detailed administration → Chemical hazards section 43.11. Chemicals are managed in the Detailed administration → Chemicals, see section 43.12.

Chapter 12 Safety data sheets

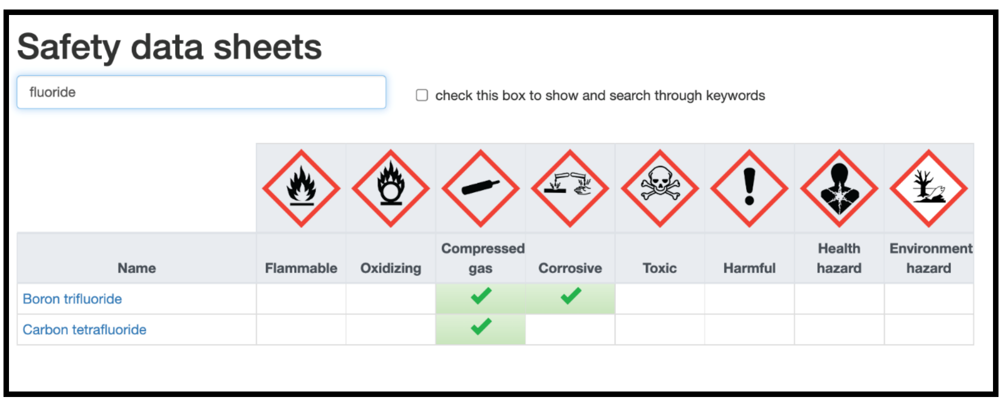


Name ▲	Flammable	Oxidizing	Compressed gas	Corrosive	Toxic	Harmful	Health hazard	Environment hazard
Acetylene			✓		✓			
Boron trifluoride			✓	✓				
Carbon tetrafluoride			✓					
Formaldehyde						✓		
Glycolic acid				✓			✓	

Figure 12.1: *Safety data sheets*

12.1 Search for a chemical

Use the search input field to type the name of a chemical. Only matching chemicals will appear in the table (Figure 12.2).



Name	Flammable	Oxidizing	Compressed gas	Corrosive	Toxic	Harmful	Health hazard	Environment hazard
Boron trifluoride			✓	✓				
Carbon tetrafluoride			✓					

Figure 12.2: *Safety data sheets search*

Chapter 12 Safety data sheets

Keywords can be shown and included in the search by checking the checkbox (Figure 12.3, Figure 12.4).

Figure 12.3: *Safety data sheets keywords checkbox*

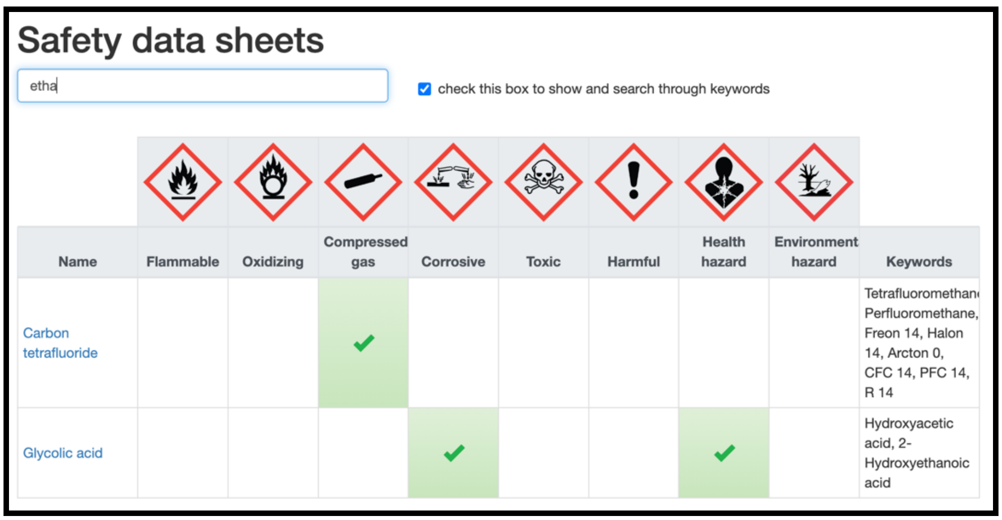


Figure 12.4: *Safety data sheets keywords search*

12.2 Document/URL

The specific chemical document/link can be view when available by click on the chemical name. A new tab will open in your web browser with the link or download the document (Figure 12.5).

Figure 12.5: *Safety data sheets chemical document link*

12.3 Export Safety data sheets

Safety data sheets can be exported into a CSV file for further processing, filtering, and sorting. Click the export button to download the file (Figure 12.6).

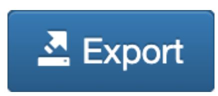


Figure 12.6: *Safety data sheets export*

12.4 Web address

The safety data sheets page is accessible at site-address/safety_data_sheets/. The page is accessible from the navigation bar under Safety.

12.5 Mobile device news and events page

There are no mobile device views for the safety data sheets page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

12.6 Safety data sheets customizations

Whether the Safety data sheet is displayed as a tab in the Safety page and whether the search through keywords is enabled by default can be customized in Customization $\rightarrow$ Safety, see section 41.12.

CHAPTER 13

KnowledgeBase

The Knowledge base page provides information for users and staff (Figure 13.1). Knowledge base items and categories can be added for users and staff in Detailed administration $\rightarrow$ User knowledge base items (see section 43.68), Detailed administration $\rightarrow$ User knowledge base categories (see section 43.67), Detailed administration $\rightarrow$ Staff knowledge base items (see section 43.55), Detailed administration $\rightarrow$ Staff knowledge base categories (see section 43.54).

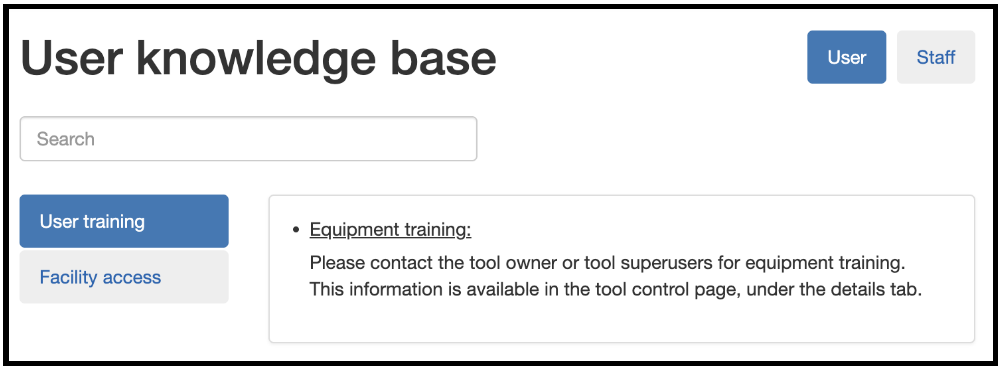


Figure 13.1: *Knowledge base page*

13.1 Usage

Click on categories on the left-hand side to see knowledge base items related to that category (Figure 13.2).

Figure 13.2: *Knowledge base categories menu*

When looking at knowledge base items, clicking on the document links will open a popup. PDF and Video formats (.mp4, .ogv, .webm, .3gp) will be shown or played directly in the popup.
Other links will initiate a download if the target is a file or redirect the user if the link is a URL.

13.2 Web address

The Knowledge base page is accessible at site-address/knowledge_base/. For staff member, the page is accessible from the Administration menu item.
For regular user, a Landing page choice needs to be added with the URL "/knowledge_base/user/".

13.3 Mobile device knowledge base page

There are no mobile device views for the knowledge base page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

13.4 Knowledge base customizations

By going to Customization → Knowledge base (see section 41.7), you can customize:

- Which category view is used for users knowledge base (all in one page, or separate on a side menu)
- Which category view is used for staff knowledge base (all in one page, or separate on a side menu)

CHAPTER 14

Send feedback

The send feedback provides users a dialog to send general comments and suggestions to staff that are not safety related (Figure 14.1).

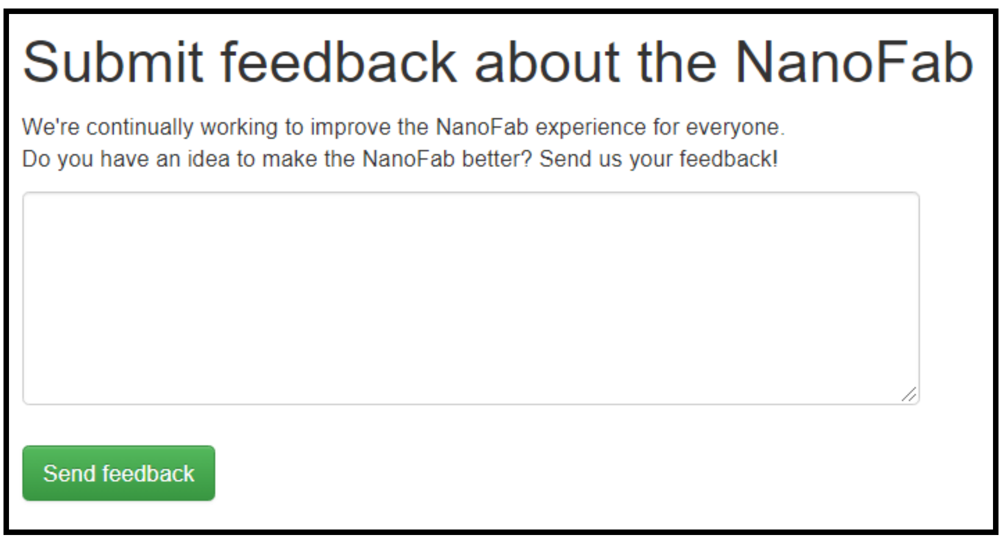


Figure 14.1: *Send feedback page*

If either the email address or email template have not been configured, a warning message the feature has not been customized will be displayed instead of the feedback page (Figure 14.2). Configuration is detailed in the Customization section.

Figure 14.2: *Send feedback not configured*

14.1 Usage

To send user feedback:

- Provide a detailed narrative in the dialog box (Figure 14.3).

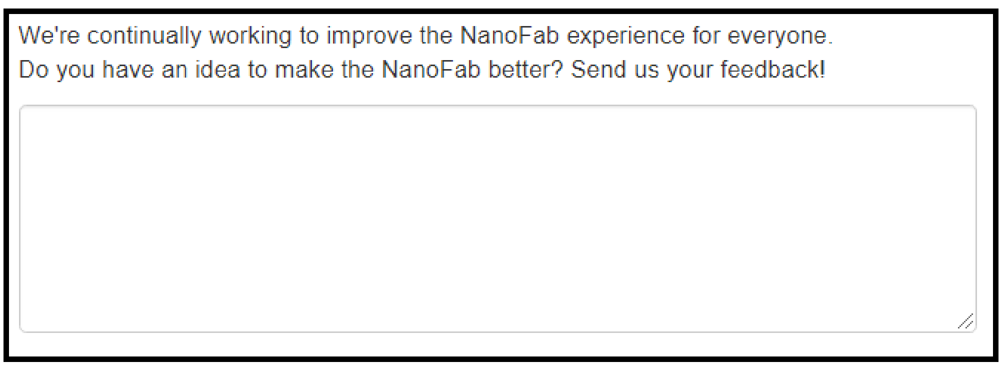


Figure 14.3: *Feedback dialog box*

- Click the send feedback button (Figure 14.4).

Figure 14.4: *Feedback send button*

- The dialog is checked for size. If the dialog is empty, the user is prompted to add information (Figure 14.5).

Figure 14.5: *Feedback empty dialog prompt*

- If the dialog is too long, it is truncated without warning.
- Feedback is sent to the configured feedback email address using the configured email template.

14.2 Web address

The send feedback page is accessible at site-address/feedback/. The page is not accessible from the navigation bar and must be either directly addressed or have a quick link created in the landing page.

14.3 Mobile device send feedback page

There are no mobile device views for the send feedback page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

14.4 Send feedback page customizations

14.4.1 Feedback email address and email template

Safety email address and email template are detailed in the Customization section.

14.5 Feedback message length

The maximum length of the feedback message is 5000 characters and can be changed in the constants.py file.

CHAPTER 15

Contact staff

The contact staff page can be used to provide information to help users get in touch with staff members (Figure 15.1). Contact information can be grouped into categories and the displayed in any order. Contacts are managed in the Detailed administration $\rightarrow$ Contact information, see section 43.20.

15.1 Fields

Each contact can have the following information. Any optional fields that are left blank will not be displayed.

- Picture (optional) – pictures are automatically resized to 266 pixels high by 200 pixels wide and can be any common picture format such as png, tiff, jpg, etc.
- Name (required) – contact first and last name.

- Email (optional) – any valid email address. The email address is displayed as a link to send email.
- Office phone (optional) – any valid phone number. The phone number is displayed as a link to make a call on a mobile device.
- Mobile phone (optional) – any valid phone number. The phone number is displayed as a link to make a call on a mobile device. In addition, a link to send a text message from a mobile device can be enabled.
- Office location (required) – description to find the contact, limited to 200 characters.

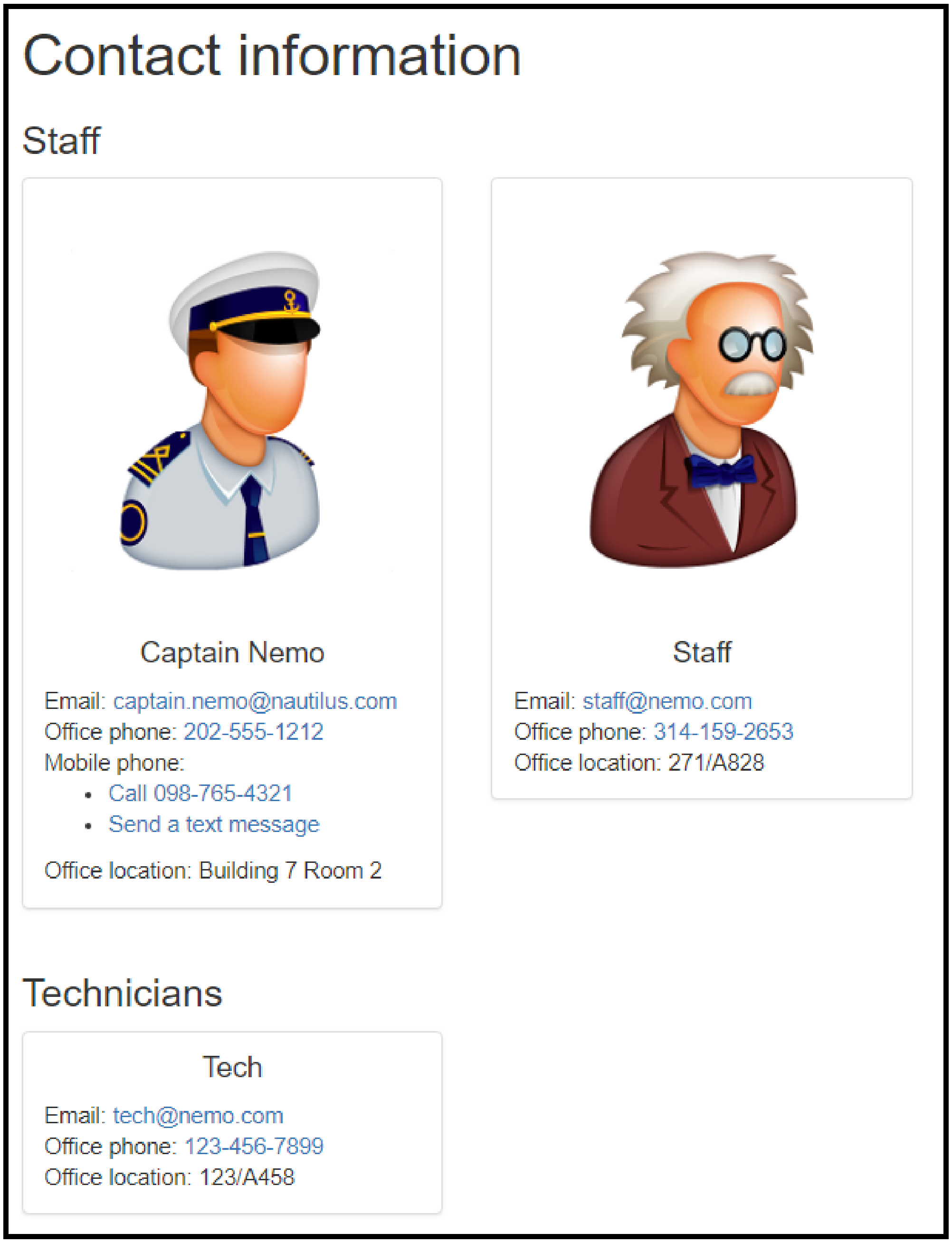


Figure 15.1: *Contact staff page*

15.2 Web address

The contact staff page is accessible at site-address/contact_staff/. The page is not accessible from the navigation bar and must be either directly addressed or have a quick link created in the landing page.

15.3 Mobile device contact staff page

There are no mobile device views for the contact staff page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

15.4 Contact staff page customizations

There are no contact staff page customizations

CHAPTER 16

View usage

The view usage page allows a user to review all records for a selectable period (Figure 16.1). When the page is first opened, it displays any records for the current month.

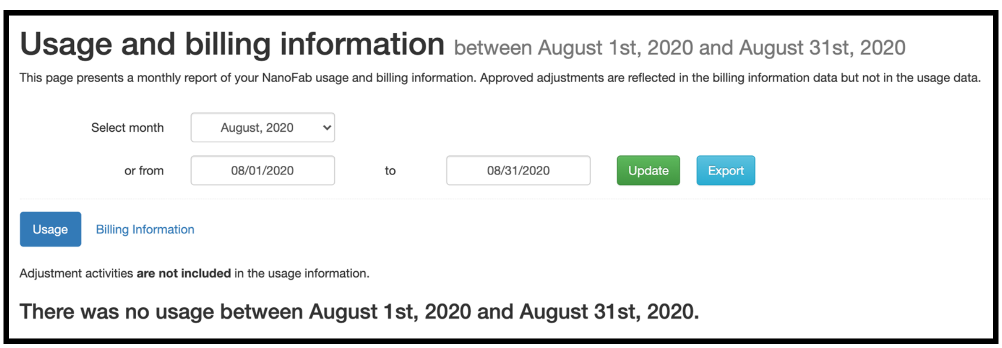


Figure 16.1: *View usage and billing*

16.1 Select date range

The date range may be selected from either the select month dropdown (Figure 16.2) or entered in the from and to dialogs. Clicking the from or to dialog will open a calendar view to select the dates (Figure 16.3).

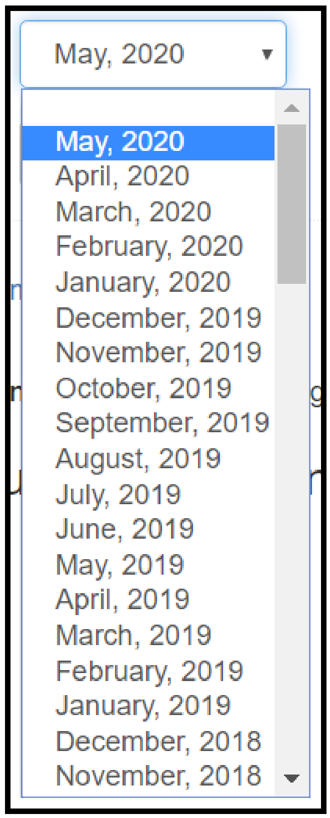


Figure 16.2: *Usage month dropdown*

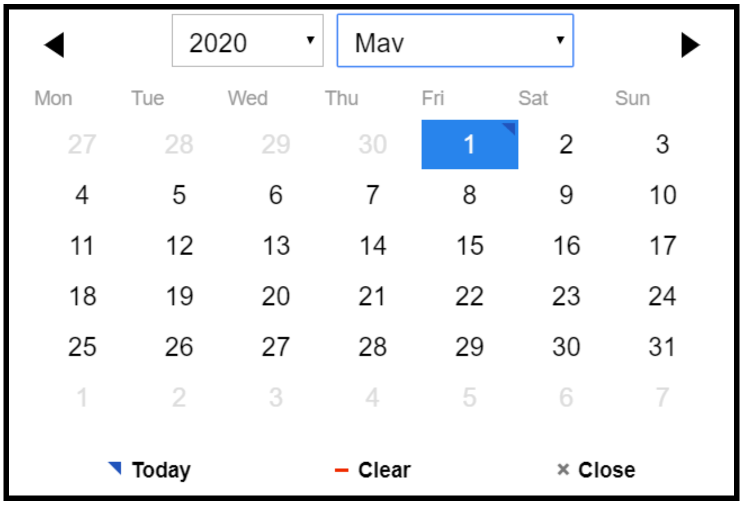


Figure 16.3: *Usage date selection*

Click update to search for records in the selected date range (Figure 16.4).

Figure 16.4: *Usage date update*

16.2 Select project

If users have more than one active projects, they can select one in the dropdown (Figure 16.5). Upon clicking update, all their activities on that project will be displayed.

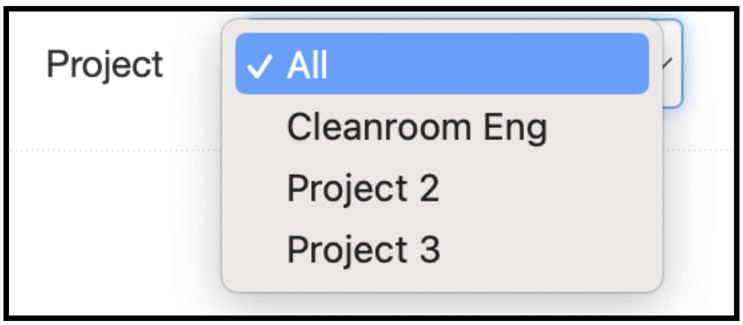


Figure 16.5: *View usage select project*

16.3 Select managed project (for Principal Investigators only)

Principal Investigators can uncheck the "Show only my usage" box to select a project they managed in the dropdown (Figure 16.6). Upon clicking update, all the activities for that project will be displayed, regardless of the user being billed. This allows PIs to check their project's users activities for example.

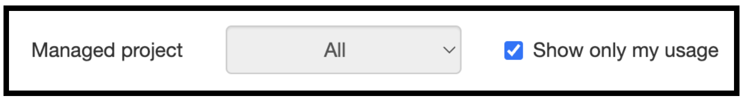


Figure 16.6: *View usage select managed project*

16.4 Usage

The usage tab will display usage data for the selected period (Figure 16.7). Clicking ‘Usage’ will highlight and activate the tab.

Figure 16.7: *View usage, usage tab*

If no usage records exist for a given period, it is indicated. If usage records exist, they are categorized in the following order:

- Missed reservations – the tool, date, time, and project information are provided (Figure 16.8).

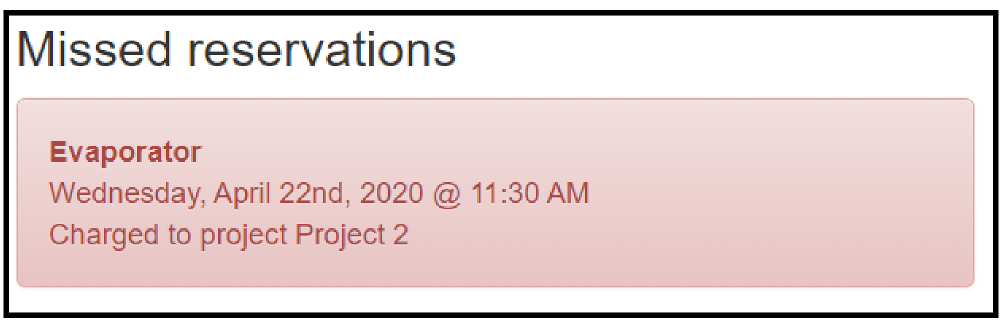


Figure 16.8: *View usage missed reservations*

- Supplies and consumables – the supply, quantity, seller, date, time, and project are provided (Figure 16.9). If the supply is related to a tool usage charge, the user will also be the seller.

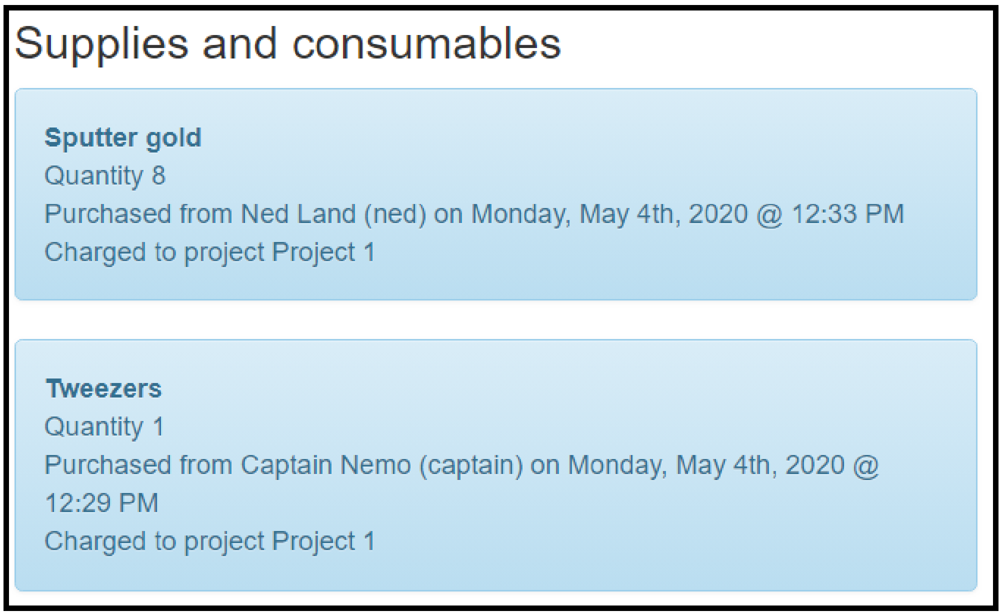


Figure 16.9: *View usage supplies and consumables*

- Staff charges – any work performed by a staff member for a user will be listed. The staff member, start date and time, end date and time, and project are listed (Figure 16.10).

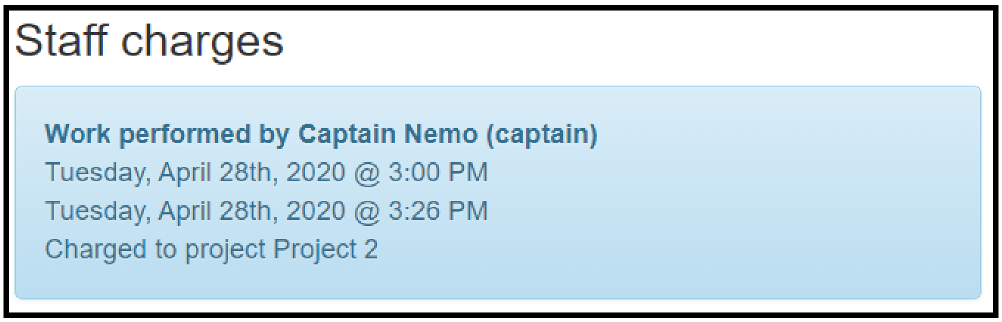


Figure 16.10: *View usage staff charges*

- Training sessions – the type of training, duration, staff member trainer, tool, project, date, and time are listed (Figure 16.11).

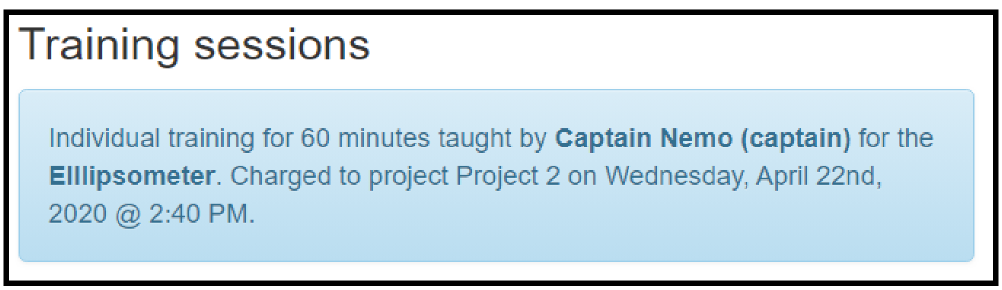


Figure 16.11: *View usage training sessions*

- Area access – the area accessed, start date and time, end date and time, and project are listed. If the area was accessed by a staff member on behalf of the user, it is highlighted in yellow, and the staff members name is also listed (Figure 16.12).

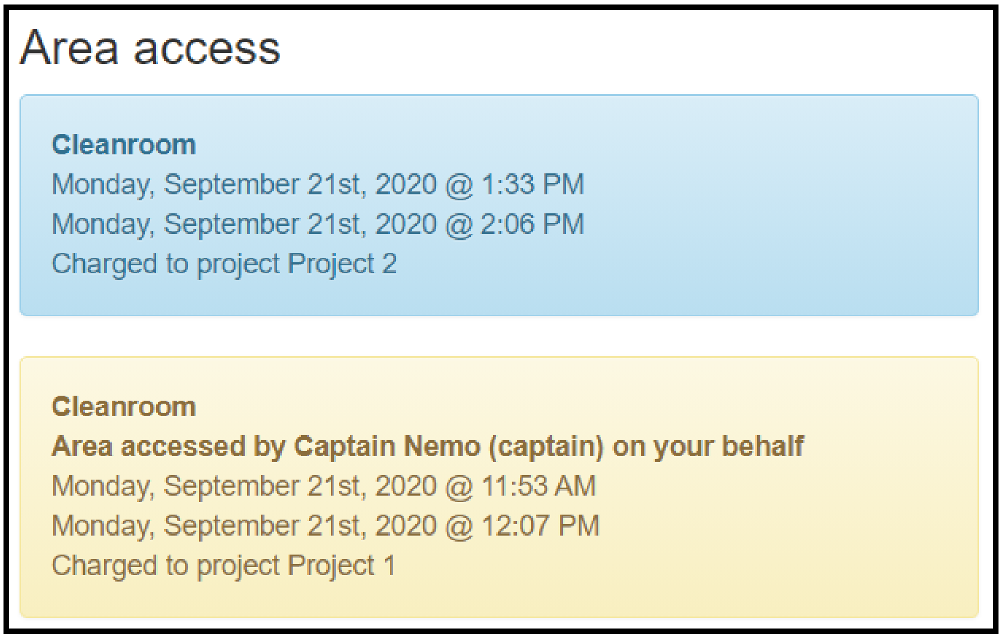


Figure 16.12: *View usage area access*

- Tool usage – tool name, start date and time, end date and time, and project are listed. If the tool was operated by a staff member on behalf of the user, it is highlighted in yellow, and the staff members name is also listed (Figure 16.13).

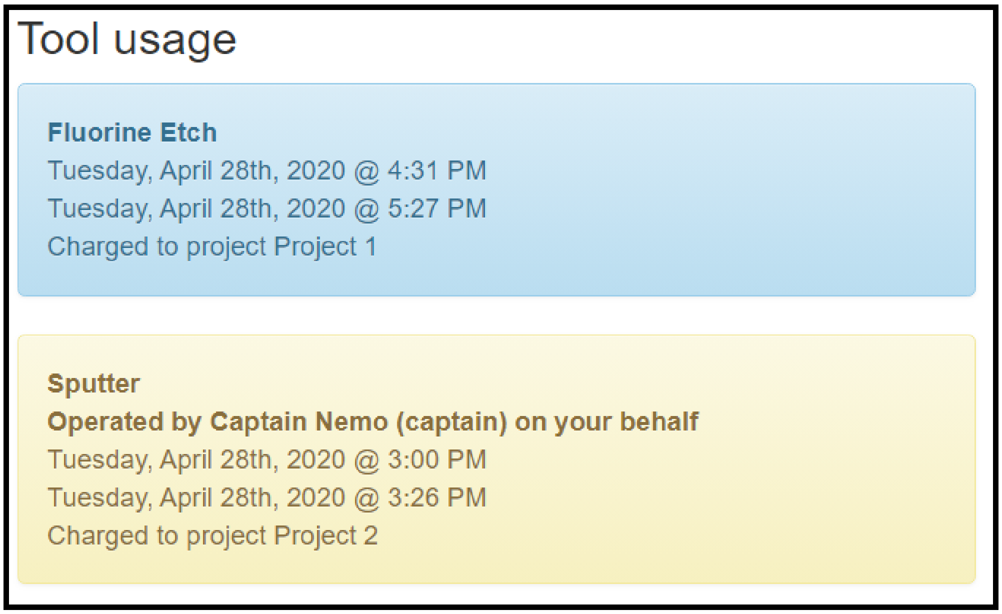


Figure 16.13: *View usage tool time*

Only categories with usage are displayed.

- Export: usage data can be exported in CSV format by clicking on the "Export" button (Figure 16.14).

Figure 16.14: *ViewUsageUsage data export*

16.5 Billing Information

The billing information tab will display charge data for the selected period (Figure 16.15). Clicking 'Billing information' will highlight and activate the tab.

Figure 16.15: *View usage, billing information tab*

The billing information tab can be used to display actual charges for a user through a customized interface to your institutions billing and project data. An example is shown in the views/usage.py file under the billing_dict function. It is beyond the scope of this manual to describe how to customize this feature for your institution. If the feature has not been configured a message will appear (Figure 16.16).

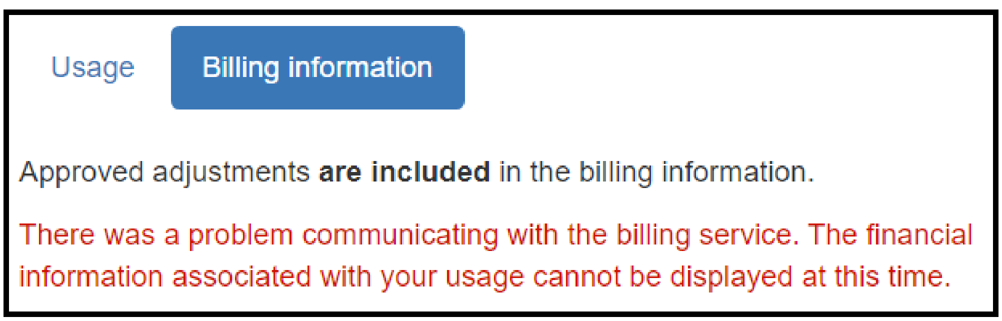


Figure 16.16: *View usage billing information error*

16.6 Web address

The view usage page is accessible at site-address/usage/ and the view billing at site-address/billing/. The page is not accessible from the navigation bar and must be either directly addressed or have a quick link created in the landing page.

16.7 Mobile device usage page

There are no mobile device views for the view usage page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

16.8 View usage page customizations

16.8.1 Billing information

Billing information data access must be customized for each institution. An example is shown in the views/usage.py file under the billing_dict function. It is beyond the scope of this manual to describe how to customize this feature for your institution.

CHAPTER 17

News and events

The news and events page provides a convenient way for the lab staff to communicate with users about non-emergency topics. For example, new equipment on order, tool installation progress, future plans, etc. Each time NEMO is updated, news articles are automatically generated and describe the new features, improvements, and bug fixes implemented in the new release.

17.1 Recent news

The news and events page shows recent news articles by default (Figure 17.1).

Figure 17.1: *News and events recent news*

Staff can create new news articles by clicking the Publish new news button (Figure 17.2). The button will not be visible to non-staff users.

Figure 17.2: *News and events publish new news button*

Users can view archived news articles by clicking the link (Figure 17.3).

Figure 17.3: *News and events archived news link*

If the article was recently created or updated, the new update icon will appear next to the article title (Figure 17.4).

Figure 17.4: *New and events new update icon*

Staff can update a news article by clicking the title (Figure 17.5). The title will not appear as a link for non-staff users.

Figure 17.5: *News and events update article title link*

If a story has more than 2 updates, only the first and last are shown (Figure 17.6).

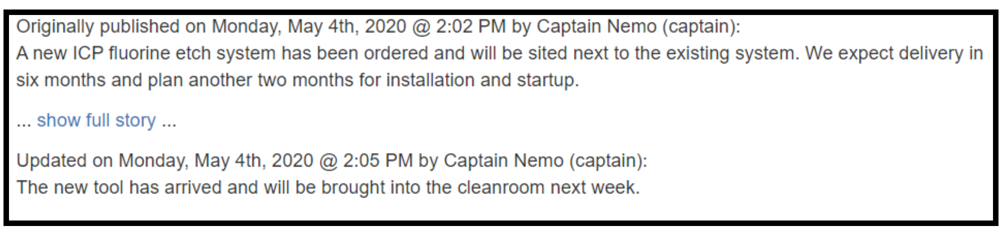


Figure 17.6: *News and events story collapsed*

Clicking the show full story link (Figure 17.7) will expand the article to include all updates (Figure 17.8).

Figure 17.7: *News and events show full story link*

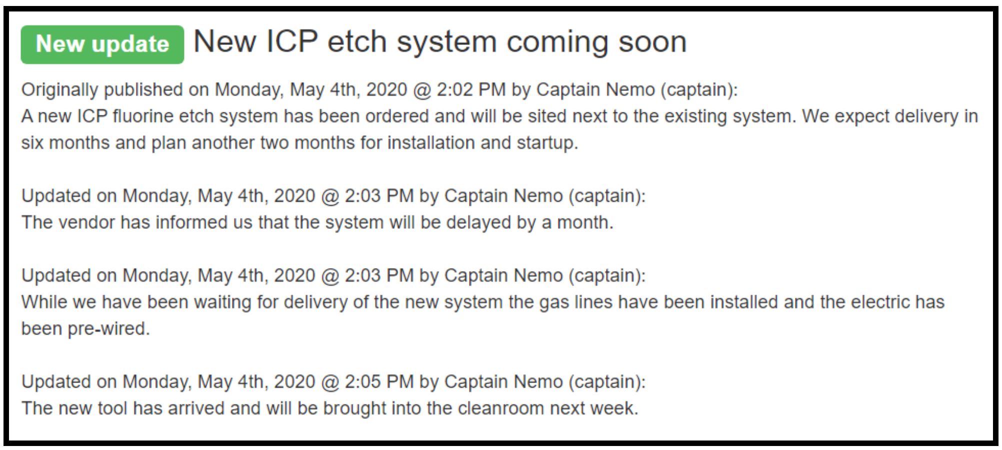


Figure 17.8: *News and events story expanded*

17.2 Archived news

The archived news page displays older articles in order of creation date from most recent to oldest (Figure 17.9).

Figure 17.9: *News and events archived articles*

Clicking the view recent news link will return to the recent news page (Figure 17.10).

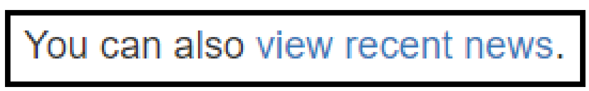
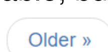


Figure 17.10: *News and events view recent news link*

Up to 20 articles are displayed per page fully expanded. If more than 20 archived articles are available, buttons will appear below the recent news link to go to the older articles 

or newer articles 

.

17.3 Publish new news (staff only)

Staff may publish new news articles by clicking the publish new news button from the recent news page (Figure 17.11).

Figure 17.11: *News and events recent news with publish new news button*

The publish new news page provides dialogs for the new story title and story body (Figure 17.12).

Figure 17.12: *News and events publish new news page*

To publish a new news article:

- Enter a story title in the top dialog box (Figure 17.13). This title will be displayed at the top of the article.

Figure 17.13: *New and events publish new news story title dialog*

- Enter the body of the story in the what's happening dialog (Figure 17.14).

Figure 17.14: *News and events publish new news story body dialog*

- Check the box if you'd like the story to stay atop the news feed (Figure 17.15).

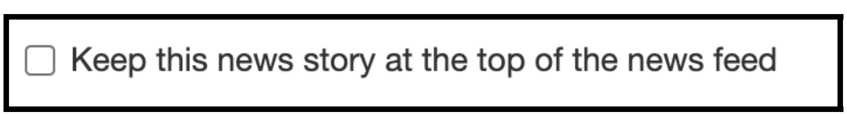


Figure 17.15: *News and events publish new news story pinned checkbox*

- Click the publish button (Figure 17.16).

Figure 17.16: *News and events publish new news story button*

- The news story is automatically created in the database with author and time and date stamp added as discussed in the Detailed administration → News section 43.29.
- Notifications for all active users are set which are detailed in the Detailed administration → Notifications section 43.30.

17.4 Update news article (staff only)

Staff may update news articles by clicking the article title link from the recent news page (Figure 17.17).

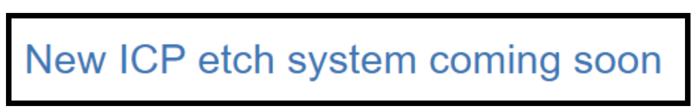


Figure 17.17: *News and events article title update link*

The update a news story page will show the original posting, all updates, an archive button, an update dialog, and publish button (Figure 17.18).

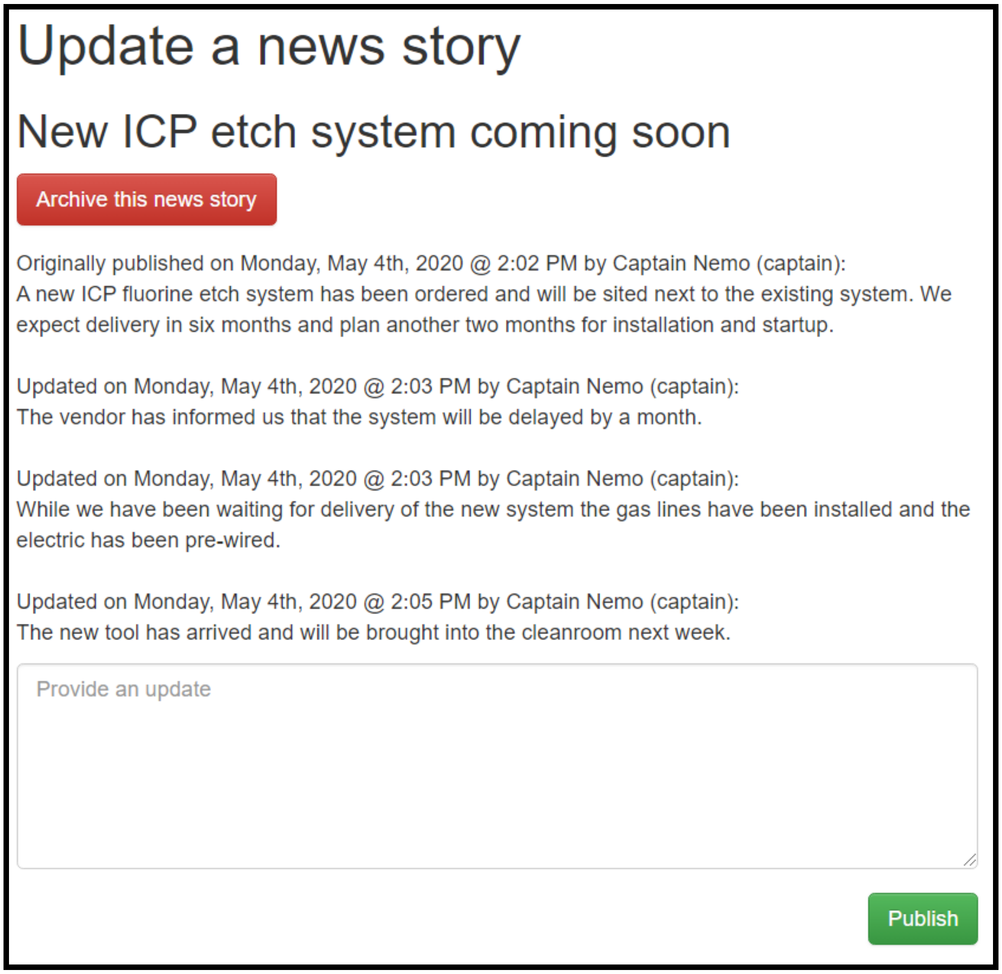


Figure 17.18: *News and events update page*

Clicking the 'Archive this news story' button will set the archive flag immediately without confirmation (Figure 17.19). Archived news stories are removed from the recent news page and displayed on the archived news page.

Figure 17.19: *News and events update page archive button*

To publish an update:

- Enter the update in the dialog box (Figure 17.20)

Figure 17.20: *News and events update dialog box*

- Check/uncheck the box if you'd like to change the pinned status of the story (Figure 17.21).

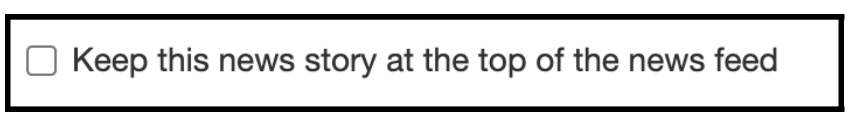


Figure 17.21: *News and events update pinned checkbox*

- Click the publish button (Figure 17.22).

Figure 17.22: *News and events update publish button*

- The news story is automatically updated in the database with author and time and date stamp added as discussed in the Detailed administration → News section 43.29.
- Notifications for all active users are set which are detailed in the Detailed administration → Notifications section 43.30.

17.5 Notifications

When news and events are created or updated, the notification status is set for all users. It automatically expires after one month. If a user accesses a page with a notification within that time, there will be a notification indicating new content since their last visit. The notifications are reset upon visiting the news and events page. Notifications are detailed in the Detailed administration → Notifications section 43.30.

If the news and events page has a link on the landing page, a red number that represents the number of articles created or updated since the user last visited the news and events page will appear to the right of the link name (Figure 17.23). Setup details can be found under the Detailed administration → Landing page choices section 43.27.

Figure 17.23: *Landing page news notification*

The next time the news and events page is visited, any new or updated articles will have a special "new update" icon to highlight the update (Figure 17.24).

Figure 17.24: *News and events News update icon*

17.6 Web address

The news and events page is accessible at site-address/news/. The page is not accessible from the navigation bar and must be either directly addressed or have a quick link created in the landing page.

17.7 Mobile device news and events page

There are no mobile device views for the news and events page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

17.8 News and events customizations

A news story is published when a new NEMO release is installed with links to the release notes and the feature manual. This feature can be disabled by setting NEW_VERSION_NEWS = False in settings.py.

CHAPTER 18

User Profile

The user profile page provides a page where users can check their personal information as well as their projects, area access levels and tool qualifications (Figure 18.1).

Chapter 18 User Profile

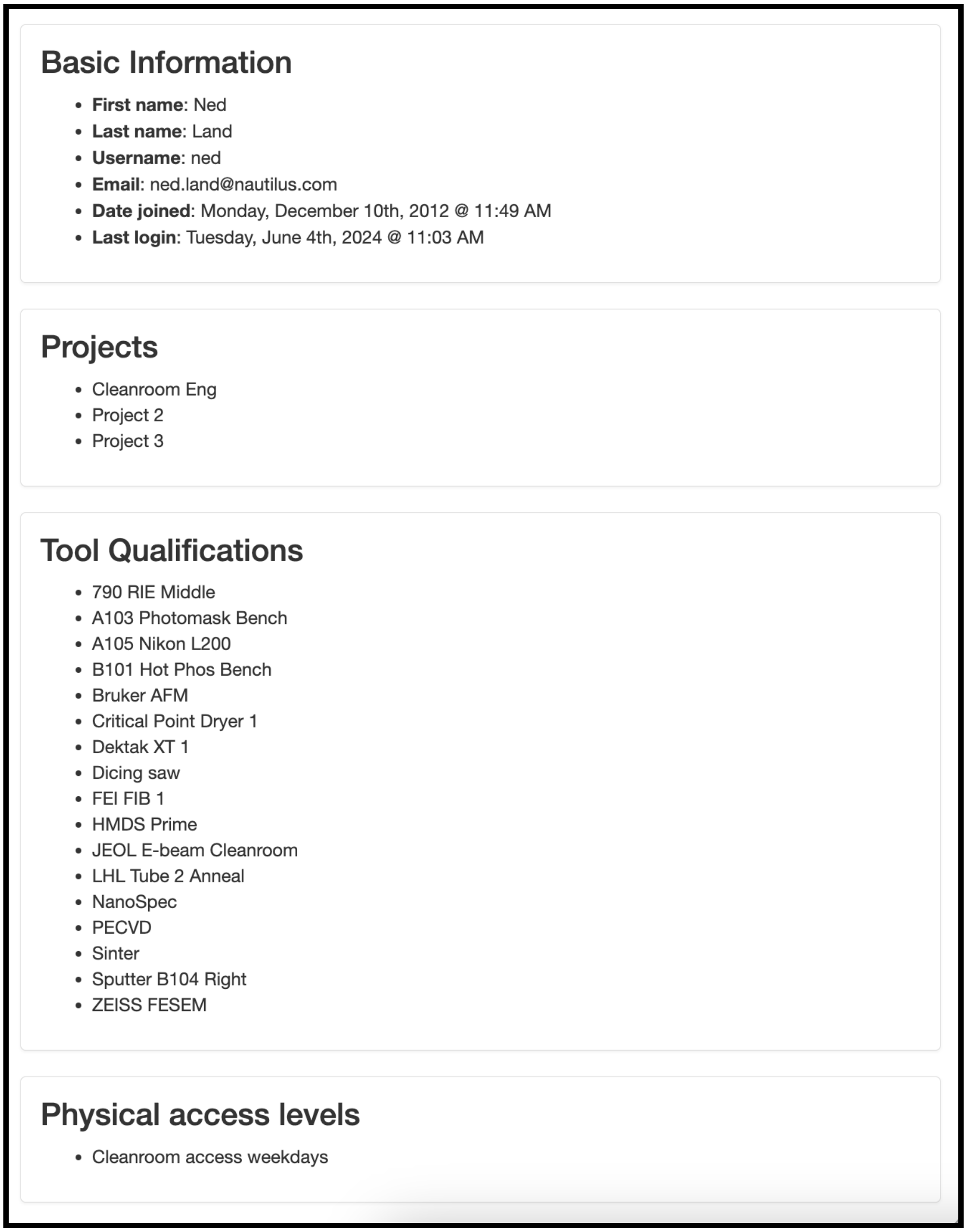


Figure 18.1: *User profile page*

18.1 Usage

This page is read-only and does not allow any user interactions.

18.2 Web address

The user profile page is accessible at site-address/view_user/<user_id>/. The page is accessible from the navigation bar by clicking the Ned link or in mobile view by selecting My profile.

18.3 Mobile device user profile page

There are no mobile device views for the user profile however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

18.4 User profile page customizations

The user profile page needs to be enabled in Customization → Users section 41.16.1.

CHAPTER 19

User Preferences

The user preferences page provides a dialog to enable user specific reservation notifications with meeting invites, tool freed time notifications, buddy system preferences, staff status view preferences and general email notification preferences (Figure 19.1, Figure 19.2).

Chapter 19 User Preferences

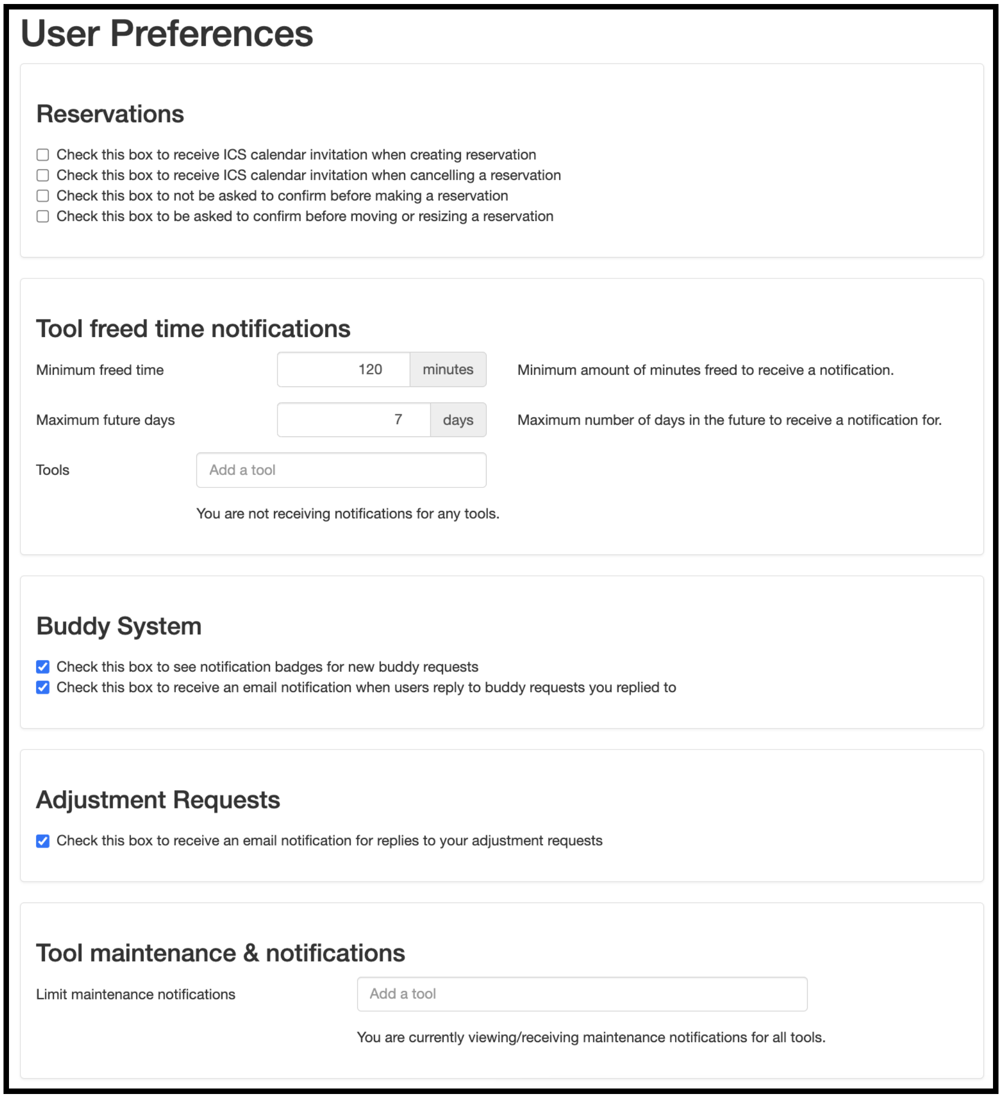


Figure 19.1: *User preferences page*

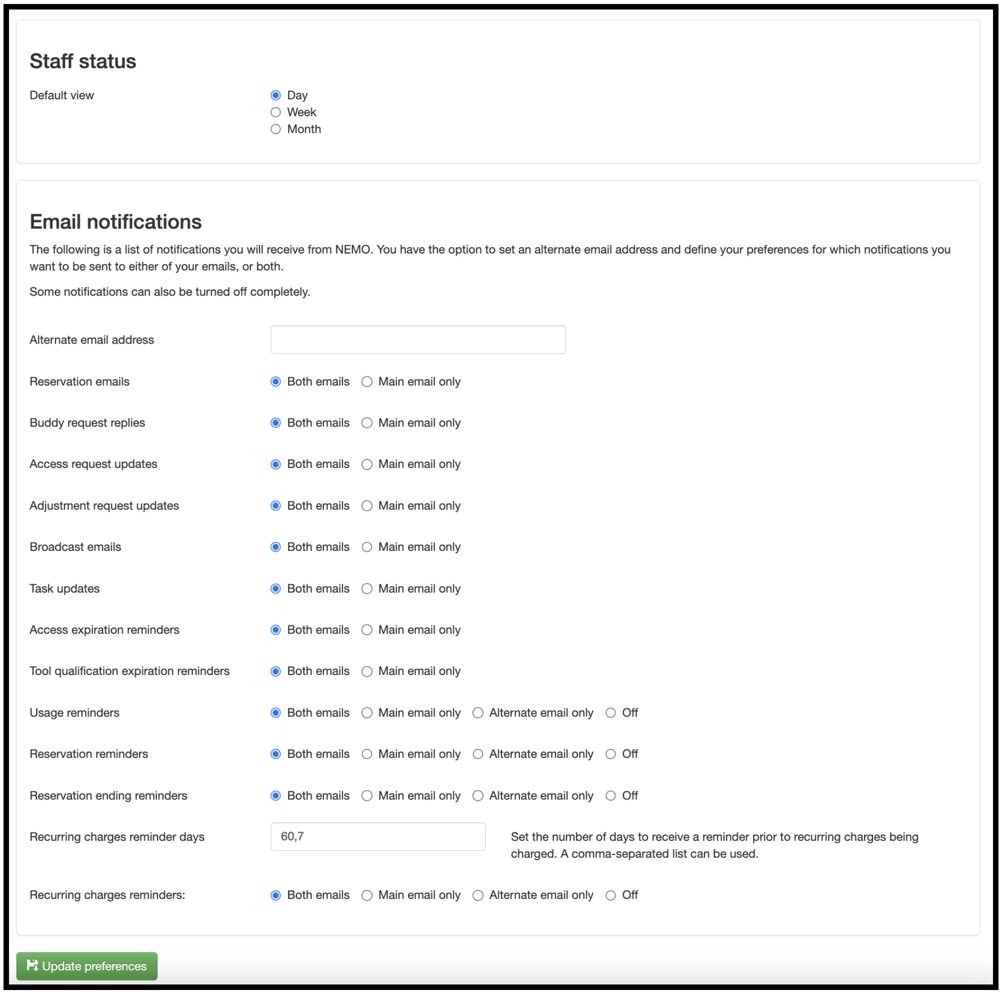


Figure 19.2: *User preferences page (continued)*

19.1 Usage

19.1.1 Reservation invites preferences

- Check the top box to receive a calendar invite when creating a reservation (Figure 19.3).

Figure 19.3: *User preferences creation email checkbox*

- Check the bottom box to receive a calendar cancellation when canceling a reservation (Figure 19.4).

Figure 19.4: *User preferences cancellation email checkbox*

19.1.2 Reservation confirmation preferences

- Check the box to be asked to confirm when creating a reservation (Figure 19.5).

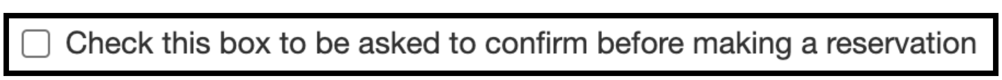


Figure 19.5: *User preferences creation confirmation checkbox*

- Check the box to be asked to confirm when moving/resizing a reservation (Figure 19.6).

Figure 19.6: *User preferences move/resize confirmation checkbox*

19.1.3 Tool freed time notifications

- Enter the minimum amount of time (in minutes) you'd like to be notified for. If the time freed is less than this amount, you will not get any notification. (Figure 19.7).

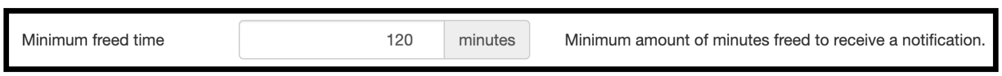


Figure 19.7: *User preferences tool time freed minimum time*

- Enter the maximum number of days in the future you'd like to be notified for. If the reservation time is later than this number of days in the future, you will not get any notification. (Figure 19.8).

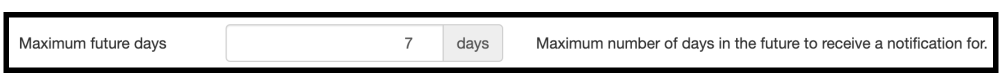


Figure 19.8: *User preferences tool time freed maximum days in future*

- Finally, search and select the tools you'd like to be notified for (Figure 19.9). An email will be sent to you when someone cancels, moves, missed or shortens a reservation that frees up time of a duration greater than your minimum, and that is not more than your maximum days in the future.

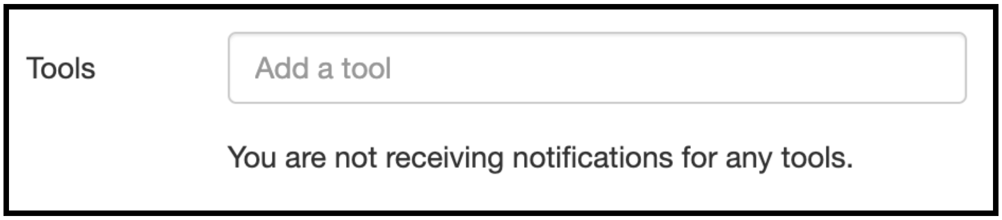


Figure 19.9: *User preferences tool time freed tool list selection*

19.1.4 Buddy board notifications

- Check the top box to see notifications for new buddy requests (Figure 19.10). They will appear as a number next to the buddy board heading on the navigation bar (Figure 19.11).

Figure 19.10: *User preferences new buddy request notification checkbox*

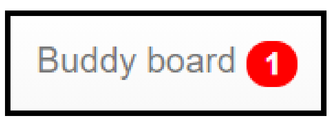


Figure 19.11: *User preferences buddy navigation bar notification*

- Check the middle box to see notifications when users reply to buddy requests you replied to (Figure 19.12).

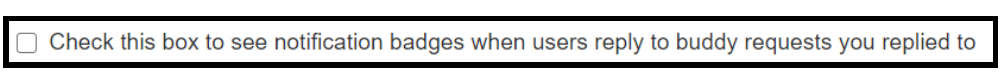


Figure 19.12: *User preferences buddy response notification checkbox*

- Check the bottom box to receive email notifications when users reply to buddy requests you replied to (Figure 19.13).

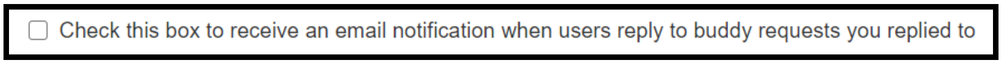


Figure 19.13: *User preferences buddy response email checkbox*

19.1.5 Adjustment requests notifications

- Check the box to receive email notifications when users reply to adjustment requests you replied to (you will always see badge notifications) (Figure 19.14).

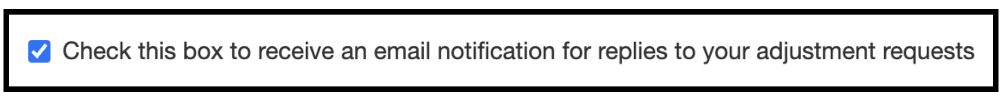


Figure 19.14: *User preferences adjustment request response email checkbox*

19.1.6 Tool maintenance & notifications

- (Facility managers, technical staff and service personnel only) Search and select tools you would like to receive maintenance notifications for. For technical staff and service personnel, this list of tools is in addition to automatically getting emails and viewing maintenance records for tools they are owners or backup owners of. For facility managers this list is a way of limiting the notification received to a subset of tools (instead of the default to receive all of them). (Figure 19.15).

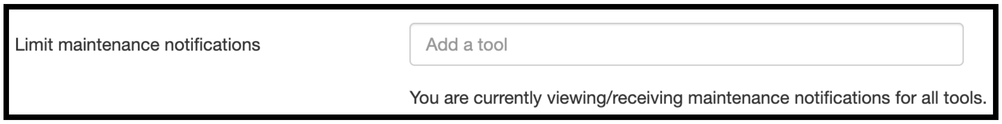


Figure 19.15: *User preferences maintenance and notification tools*

19.1.7 Staff status default view

- Check the radio button corresponding to the default view you would like to use when looking at the staff status (Figure 19.16). Note that the option won't be displayed if the user isn't authorized to see the staff status or if he can only use the day view.

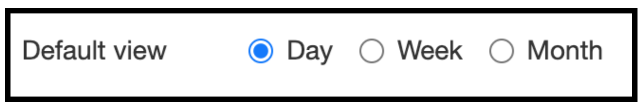


Figure 19.16: *User preferences staff status default view*

19.1.8 Email notifications

- Enter an optional alternate email address to receive notifications to.
- Check the radio button corresponding to one of the options. Some notifications can be turned off completely, while others must be sent to at least the main email address.

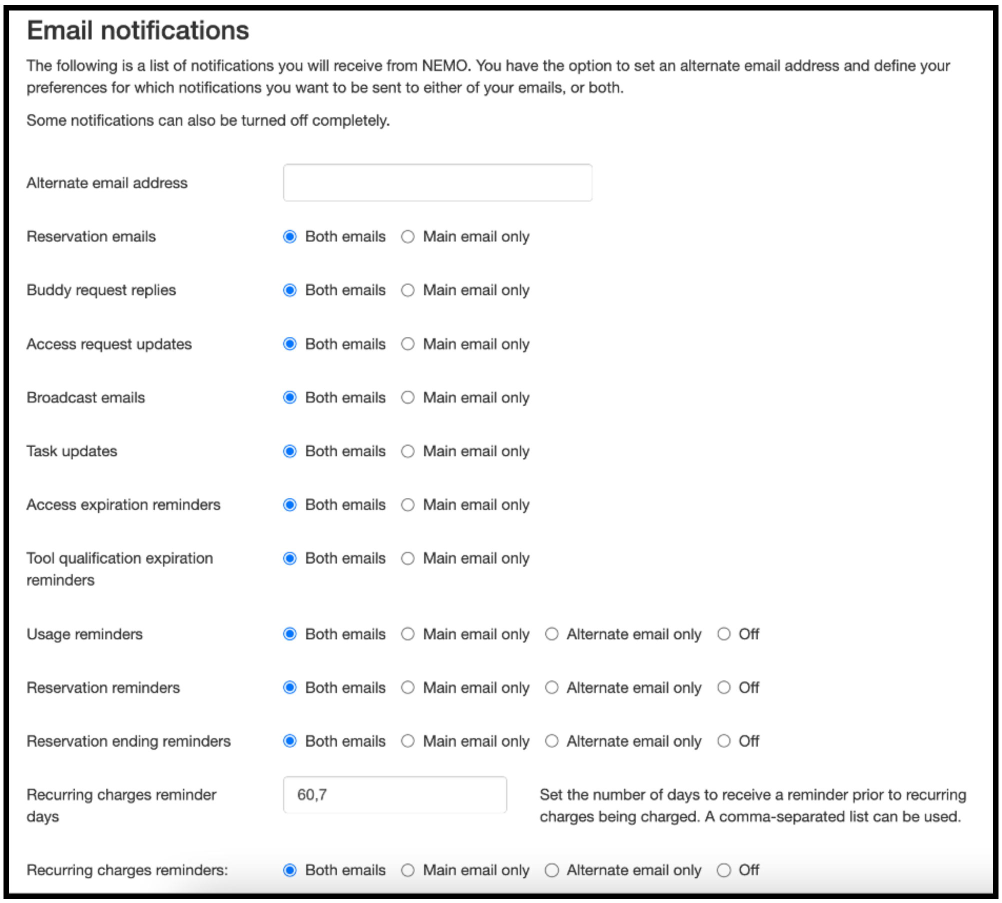


Figure 19.17: *User preferences email notifications*

19.1.9 Save user preferences

- Click the update preferences button (Figure 19.18).

Figure 19.18: *User preferences update button*

- Selections will be updated in the database as discussed in the Detailed administration → User preferences section 43.69.

19.2 Web address

The user preferences page is accessible at site-address/user_preferences/. The page is accessible from the navigation bar by clicking the link or in mobile view by selecting preferences.

19.3 Mobile device user preferences page

There are no mobile device views for user preferences however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

19.4 User preferences page customizations

There are no user preferences customizations.

CHAPTER 20

Administration menu (staff only)

The administration menu provides the interfaces to manage accounts, projects, users, tools, areas, training, and maintenance as well as customize NEMO setups and access the NEMO database (Figure 20.1). Only staff have access to the administration menu and pages. Some administration pages also require super-user privilege (API, Customization, Impersonate).

Chapter 20 Administration menu (staff only)

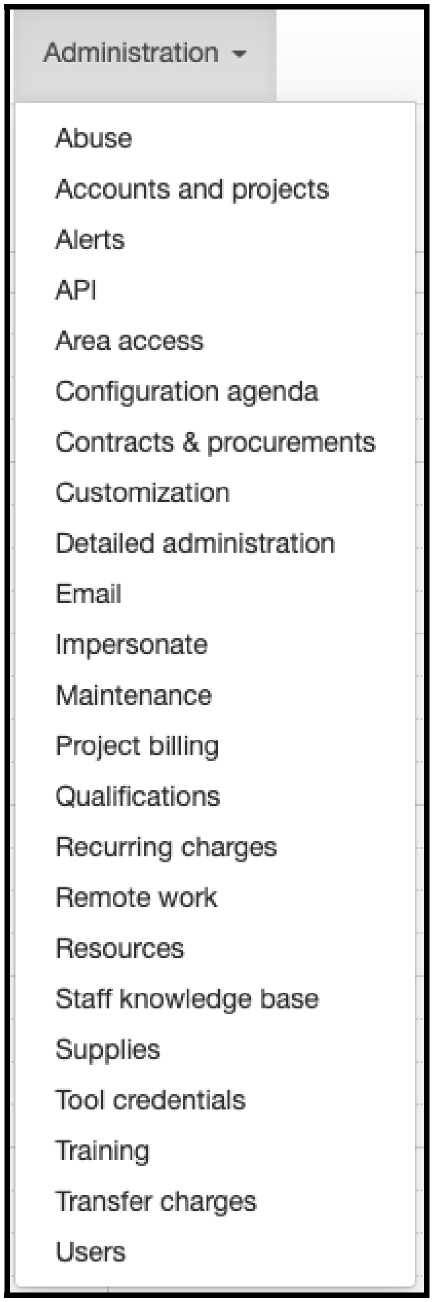


Figure 20.1: *Administration menu*

CHAPTER 21

Abuse (managers only)

The abuse page can take various inputs to score users on their missed reservations and last-minute cancelations (Figure 21.1).

Figure 21.1: *Abuse managers only Reservation abuse page*

21.1 Web address

The abuse page is accessible at site-address/abuse/. For example, www.nemo.com/abuse/. The page is also accessible from the navigation bar by clicking Administration then clicking Abuse.

21.2 Mobile device abuse page

There are no mobile device views for the abuse page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

21.3 Mobile device abuse page

There are no customizations for the abuse page.

CHAPTER 22

Accounts and projects (user office, accounting and managers only)

The accounts and projects page provides the interface to administer accounts, projects, and user permissions on projects.

An account is at the top of the hierarchy. This is where you send the bill. An account can have many projects.

Projects are used to identify different efforts by the same account. This is what department or group is charging the account. Each project can have many users.

A user can be active on any number of projects under any number of accounts.

Many accounts will have one project with one or more users, but NEMO has the flexibility to accommodate any mode of operation.

Chapter 22 Accounts and projects (user office, accounting and managers only)

Upon entering the page, there are buttons to add accounts, add projects, search for accounts or projects, and a list of all accounts and projects (Figure 22.1).

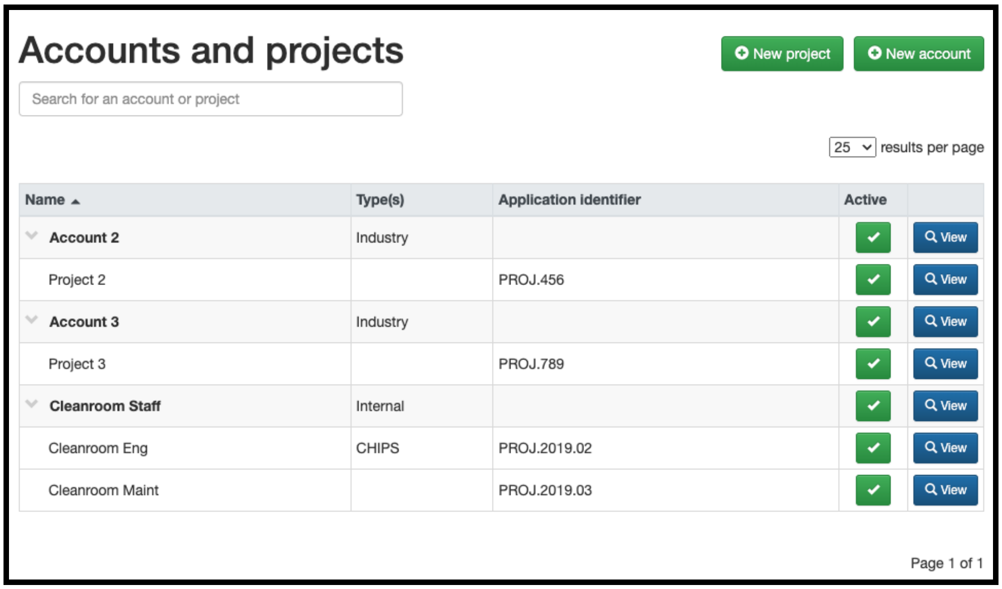


Figure 22.1: *Accounts and projects page*

22.1 Search for existing accounts or projects

To search for an existing account or project, start typing in the search dialog (Figure 22.2).

Figure 22.2: *Accounts and projects search dialog*

Results are returned as characters are typed and the account or project of interest can be selected at any time by clicking the name (Figure 22.3).

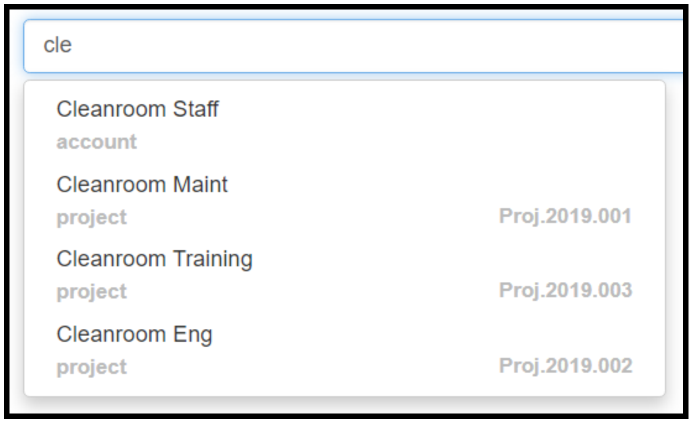


Figure 22.3: *Accounts and projects search return list*

Upon selecting an account, the base account and all associated projects are displayed (Figure 22.4).

Figure 22.4: *Accounts and projects list view*

The top of the list is the account name (Figure 22.5).

Figure 22.5: *Accounts and projects view account*

Each project title is listed (Figure 22.6).

Figure 22.6: *Accounts and projects view project*

The application identifier is listed below the project title (Figure 22.7).

Figure 22.7: *Accounts and projects project application identifier*

Upon selecting a project, the project name, account, project identifier and start date (if defined) are displayed (Figure 447). Clicking on the account name will link back to the account view (Figure 22.8)

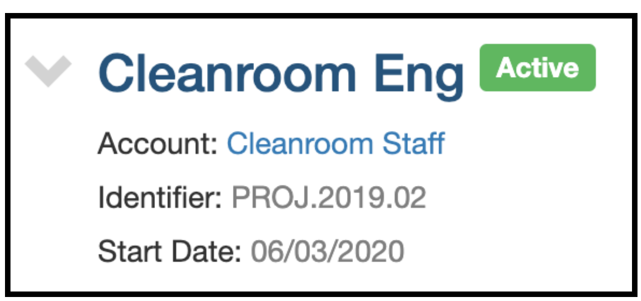


Figure 22.8: *Accounts and projects project view*

22.2 Account and project status

Accounts and projects can be either active or inactive and their status is indicated by an icon. Changing an account to inactive will cause all of its associated projects to inherit the inactive state regardless of individual project statuses. Although a project will inherit its account inactive status, the individual project statuses are not changed. Projects that are inactive, either directly or inherited from account, cannot be selected on any lab use activity.

Clicking the icon will toggle the status.

Account or project is active

Account or project is inactive

On the list view, account or project status can be toggled by clicking on the green icon  to deactivate, or the red icon  to reactivate an account/project.

Any change in account or project status is recorded in the activity histories table of the database detailed in the Detailed administration → Activity histories section 43.3.

22.3 Manage users on a project

Users can be added and removed to any project regardless of associated accounts through the Accounts and project page or the Users page.

To manage users on a project:

- Search for a project or select one from the list view using the details icon .
- Click the on a project listing to expand the project dialog and include qualified users (Figure 22.9).

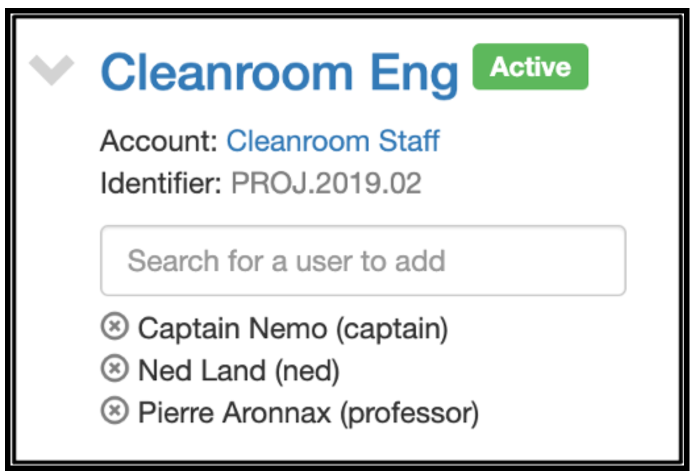


Figure 22.9: *Accounts and projects expanded dialog*

- To add a user, click in the search dialog box (Figure 22.10).

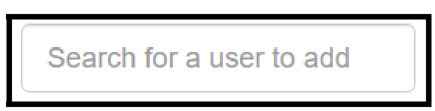


Figure 22.10: *Accounts and projects search for user*

- Results are returned as characters are typed and the name of interest can be selected at any time by clicking the name on the list (Figure 22.11).

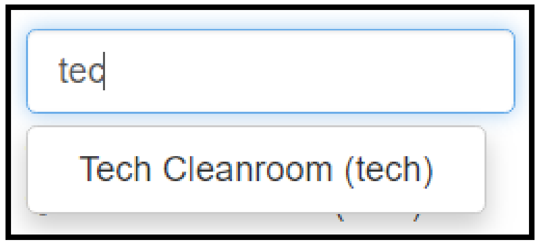


Figure 22.11: *Accounts and projects add user*

- The selected user is added immediately without confirmation and the list of users displayed is updated.
- Click the to remove a user from a project. The removal is immediate without confirmation and the list of users displayed is updated.
- Adding or removing a user on a project is recorded in the membership history table of the database detailed in the Detailed administration → Membership histories section 43.28.
- Clicking the will collapse the project dialog.

22.4 Create an account

To create an account:

- Click the new account button on the accounts and projects page (Figure 22.12).

Figure 22.12: *Accounts and projects new account button*

- The new account dialog will open (Figure 22.13).

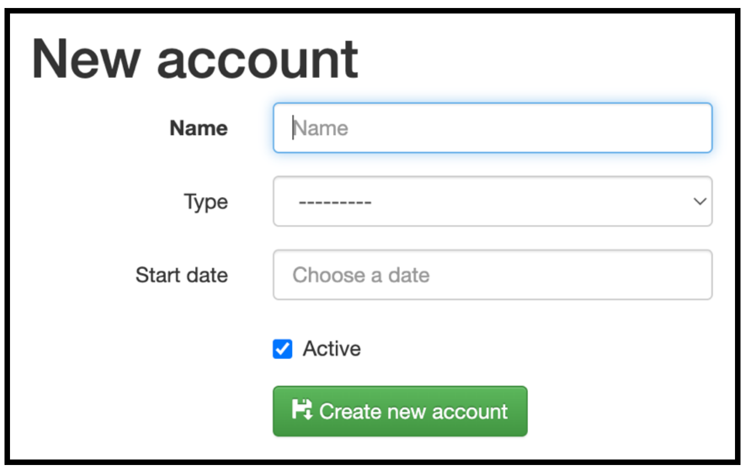


Figure 22.13: *Accounts and projects new account dialog*

- Enter the account name in the dialog box (Figure 22.14).

Figure 22.14: *Accounts and projects new account name dialog box*

- If account types are defined, you have the option to select the type (Figure 22.15).

Figure 22.15: *Accounts and projects new account type selector*

- Enter the start date of the account (optional) (Figure 22.16).

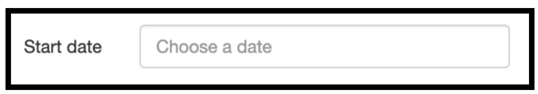


Figure 22.16: *Accounts and projects new account start date*

- The active checkbox is checked by default. It can be unchecked for inactive status (Figure 22.17).

Figure 22.17: *Accounts and projects new account active checkbox*

- Click the create new account button (Figure 22.18).

Figure 22.18: *Accounts and projects new account create button*

- The new account is recorded in the accounts table of the database detailed in the Detailed administration → Accounts section 43.2.
- The page will return to the accounts and projects page with the new account selected (Figure 22.19).

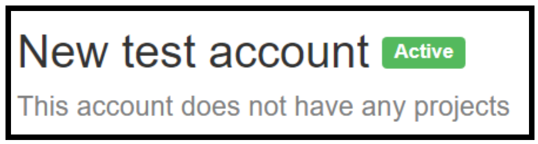


Figure 22.19: *Accounts and projects new account finished*

- If a duplicate account name is entered, an error will appear (Figure 22.20).

Figure 22.20: *Accounts and projects new account error*

22.5 Create a project

To create a project:

- Click the new project button on the accounts and projects page (Figure 22.21).

Figure 22.21: *Accounts and projects new project button*

- The new project dialog will open (Figure 22.22).

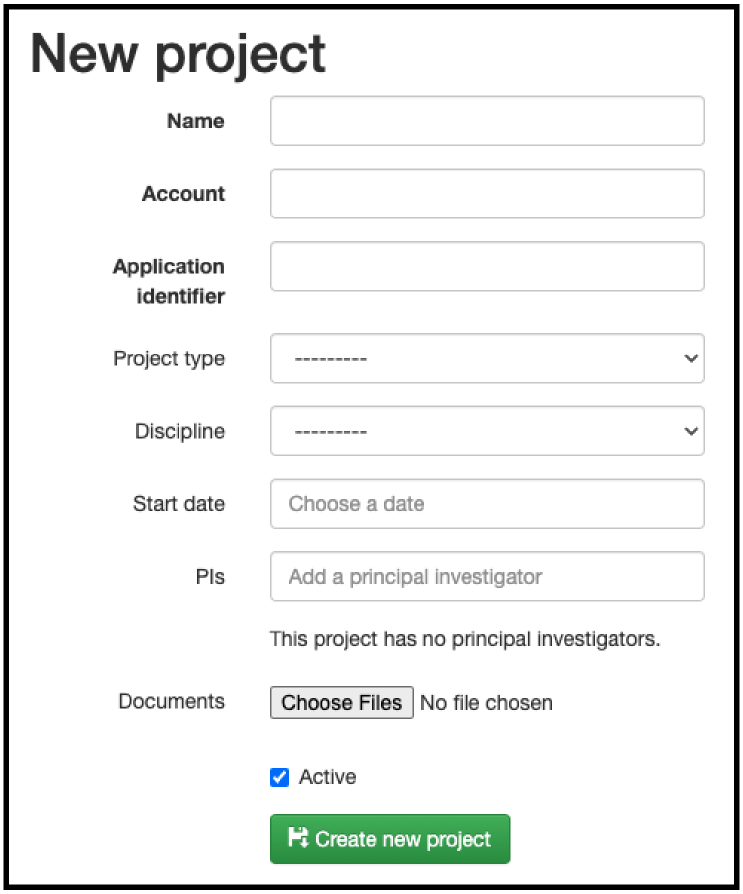


Figure 22.22: *Accounts and projects new project dialog*

- Enter the project name in the name dialog box (Figure 22.23).

Figure 22.23: *Accounts and projects new project name*

- Enter the account name in the account dialog box (Figure 22.24).

Figure 22.24: *Accounts and projects new project account search*

- Results are returned as characters are typed and the name of interest can be selected at any time by clicking the name on the list (Figure 22.25).

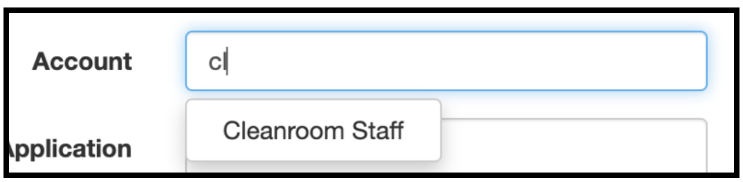


Figure 22.25: *Accounts and projects new project account list*

- Enter the application identifier in the application dialog box (Figure 22.26).

Figure 22.26: *Accounts and projects new project application identifier*

- If project types are configured in your instance, select the one for this project (optional) (Figure 22.27).

Figure 22.27: *Accounts and projects new project type*

- If project disciplines are configured in your instance, select the one for this project (optional) (Figure 22.28).

Figure 22.28: *Accounts and projects new project discipline*

- Enter the start date of the project (optional) (Figure 22.29).

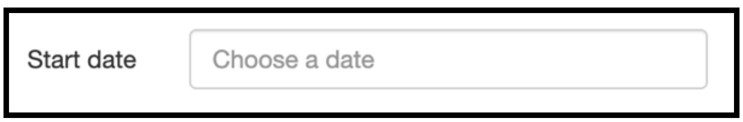


Figure 22.29: *Accounts and projects new project start date*

- Select the project PI(s) (optional) (Figure 22.30).

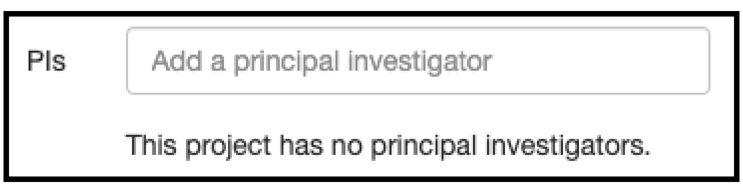


Figure 22.30: *Accounts and projects new project PI(s)*

- Select any number of documents to upload (optional) (Figure 22.31). This feature needs to be enabled in the Customization → Projects and accounts section 41.8.

Figure 22.31: *Accounts and projects new project documents*

- The active checkbox is checked by default. It can be unchecked for inactive status (Figure 22.32).

Figure 22.32: *Accounts and projects new project active checkbox*

- Click the create new project button (Figure 22.33) to confirm.

Figure 22.33: *Accounts and projects new project create button*

- The new project is recorded in the projects table of the database detailed in the Detailed administration → Projects section 43.36.
- The page will redirect to the project details page (Figure 22.34).

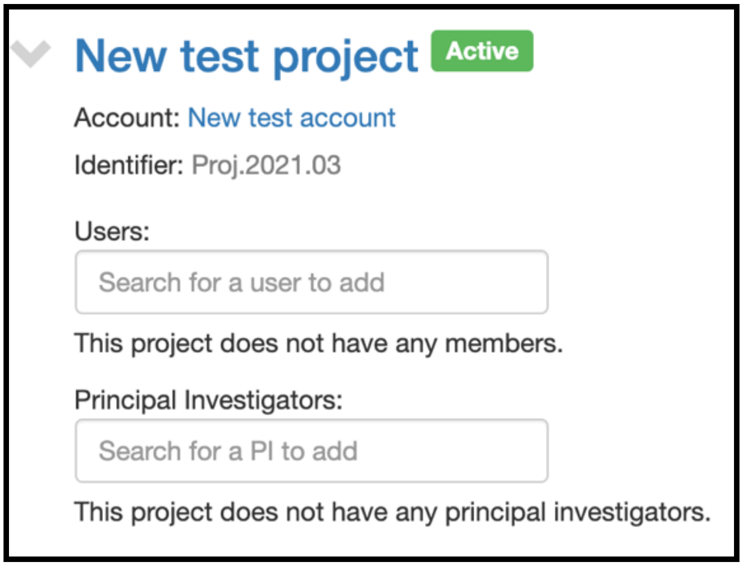


Figure 22.34: *Accounts and projects new project finished*

- If the project name already exists, an error will be created (Figure 22.35).

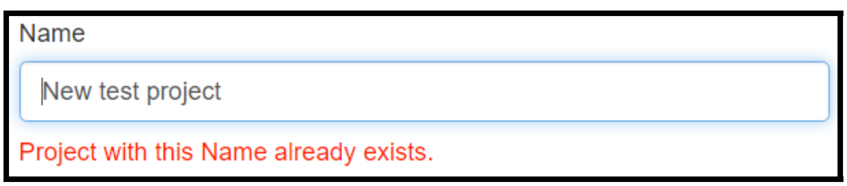


Figure 22.35: *Accounts and projects new project error*

22.6 Web address

The accounts and projects page is accessible at site-address/accounts_and_projects/. The page is also accessible from the navigation bar by clicking Administration then clicking Accounts and projects.

22.7 Mobile device accounts and projects page

There are no mobile device views for the accounts and projects page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

22.8 Accounts and projects page customizations

There are several customizations available for accounts and projects. They are discussed in the Customizations → Project and accounts section 41.8.

CHAPTER 23

Alerts (staff and user office only)

The alerts page creates notifications to all users and can have a scheduled start date and time as well as a scheduled end date and time. Any existing alerts are displayed at the bottom of the page and can be edited or deleted. (Figure 23.1). Existing alerts display the title, details, start date/time and end date/time.

Chapter 23 Alerts (staff and user office only)

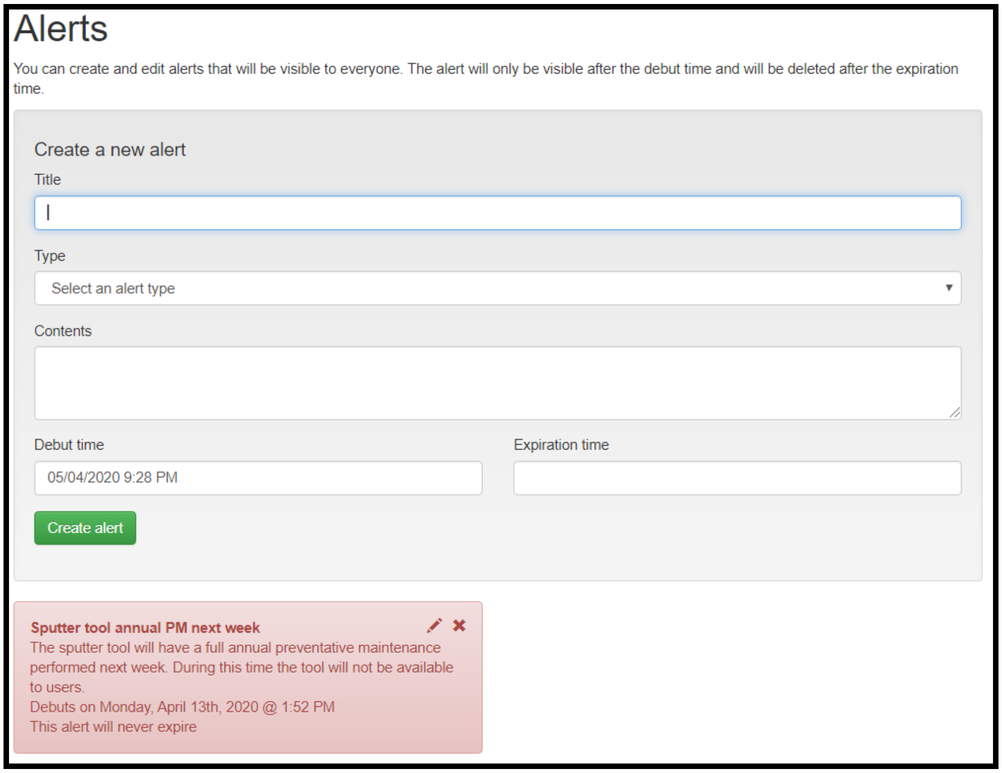


Figure 23.1: *Alerts page*

23.1 Create an alert

To create an alert:

- Enter an alert title (Figure 23.2). The title is displayed in bold at the top of the alert message.

Figure 23.2: *Alerts title dialog box*

- Select an alert type (Figure 23.3). The alert type will only display if alert types have been defined in the alert categories table of the database detailed in the Detailed administration → Alert categories section 43.5.1. Categorizing alerts can be useful for binning alerts aiding in future analysis and trending.

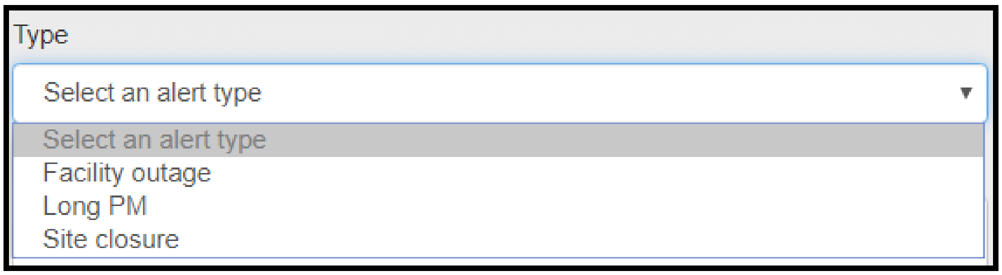


Figure 23.3: *Alerts type dropdown*

- Provide details to share with users (Figure 23.4).

Figure 23.4: *Alerts details dialog box*

- Select a start date and time (Figure 23.5). The default is now.

Figure 23.5: *Alerts start date and time*

- Select an end date and time (Figure 23.6). To prevent alert expiration, leave this blank.

Figure 23.6: *Alerts end date and time*

- Clicking in the start or end date/time area will bring up the calendar/clock selection dialog (Figure 23.7). Click to the appropriate date and time. The date/time dialog will update as you click.

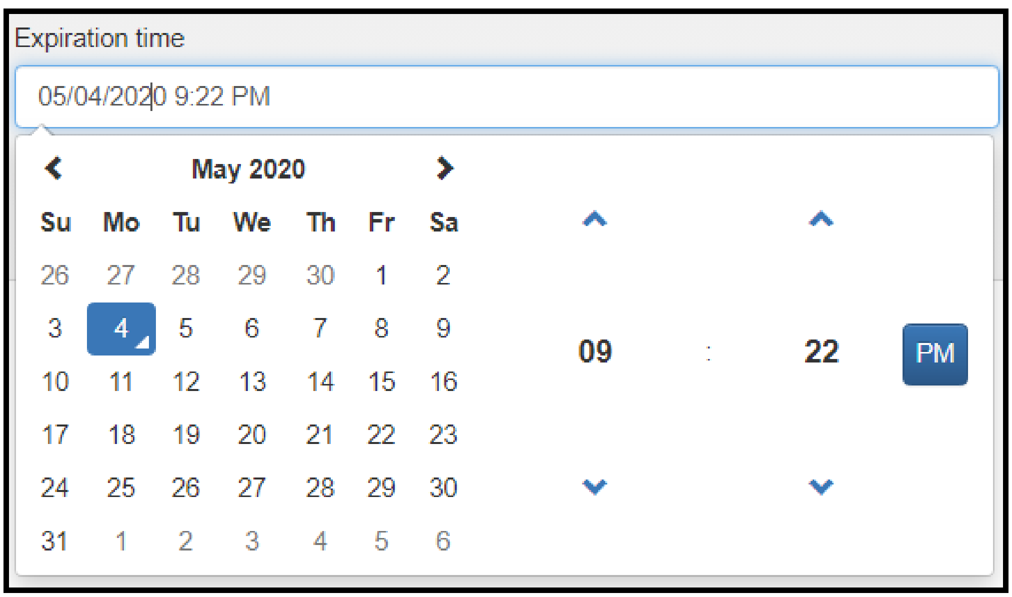


Figure 23.7: *Alerts calendar/clock dialog*

- Click the create alert button (Figure 23.8).

Figure 23.8: *Alerts create button*

- Upon creation, the alert will be saved in the database and is detailed in the Detailed administration → Alerts section 43.6.
- The new alert will be displayed at the bottom of the alerts page and on the landing page.

23.2 Delete an alert

An alert can be deleted by clicking the ✖ icon in the alert of interest at the bottom of the alerts page (Figure 23.9). The deletion is immediate without confirmation. The alert is still saved in the database but marked as deleted and will no longer be displayed.

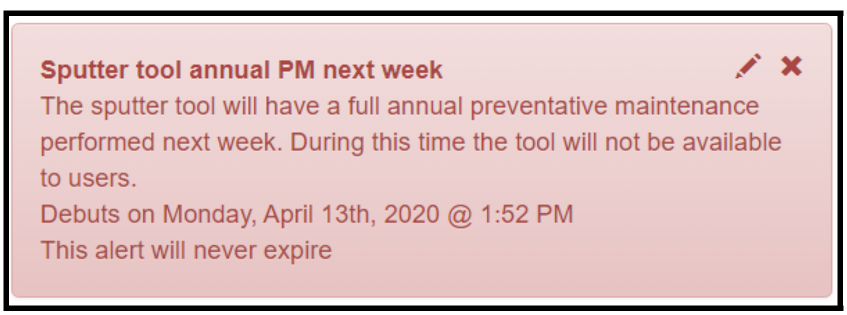


Figure 23.9: *Alerts existing alert dialog*

23.3 Edit an alert

To edit an alert:

- Click the icon in the alert dialog of interest.
- The alert edit page will open (Figure 23.10).

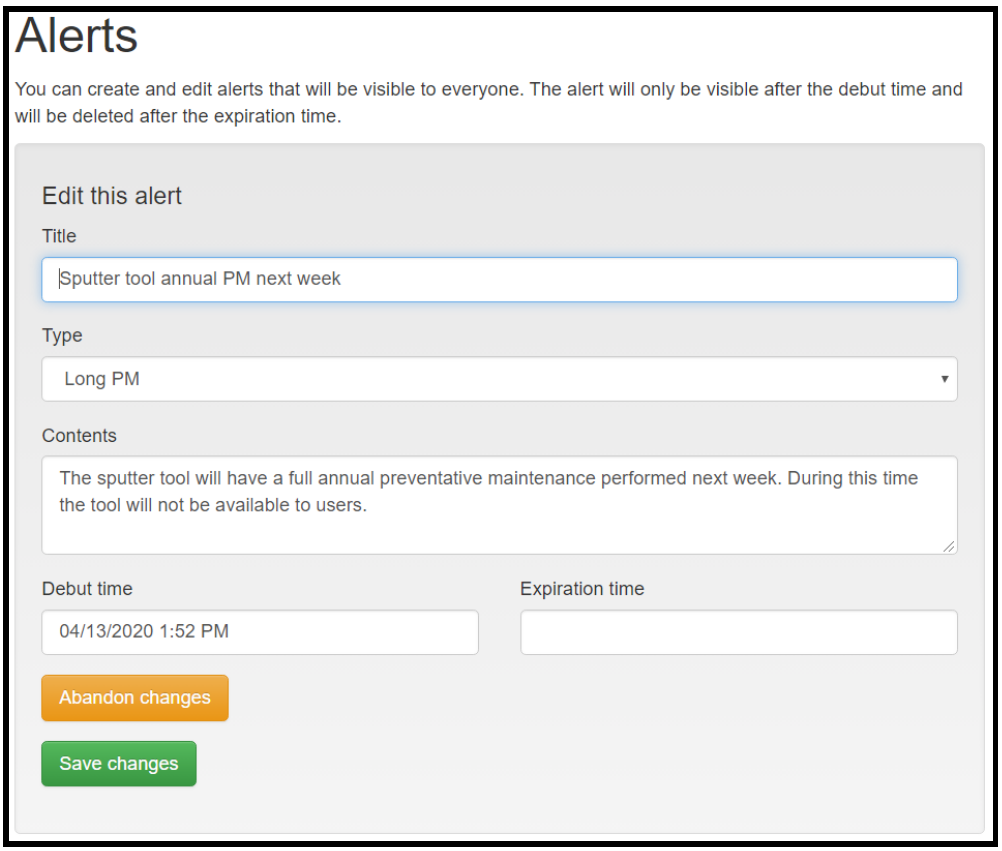


Figure 23.10: *Alerts edit existing alert page*

- Edit any fields that need updating. The process is identical to creating an alert above.

- To cancel click the abandon changes button (Figure 23.11).

Figure 23.11: *Alerts edit abandon changes button*

- To save the update click the save changes button (Figure 23.12).

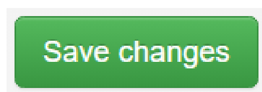


Figure 23.12: *Alerts edit save changes button*

23.4 Web address

The alerts page is accessible at site-address/alerts/. The page is also accessible from the navigation bar by clicking Administration then clicking Alerts.

23.5 Mobile device alerts page

There are no mobile device views for the alerts page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

23.6 Alerts page customizations

23.6.1 Alerts page customizations

The alert type will only display if alert types have been defined in the alert categories table of the database detailed in the Detailed administration → Alert categories section.

CHAPTER 24

API (admin only)

This topic is discussed in more details in the API access chapter 51.

CHAPTER 25

Area Access (staff and user office only)

The area access page can be used to manually create an area access record and view area access (Figure 25.1).

Figure 25.1: *Area access page*

25.1 Create an access record

An area access record can be manually created due to a door access hardware or network failure. However, the preferred method to bypass area access requirements is to enable users to log themselves in and out of areas from the landing page which is setup in Customizations → Application settings section 41.2.

To create an area access record:

- Click the manually create an access record link (Figure 25.2).

Figure 25.2: *Area access new record link*

- The new area access record page will open (Figure 25.3).

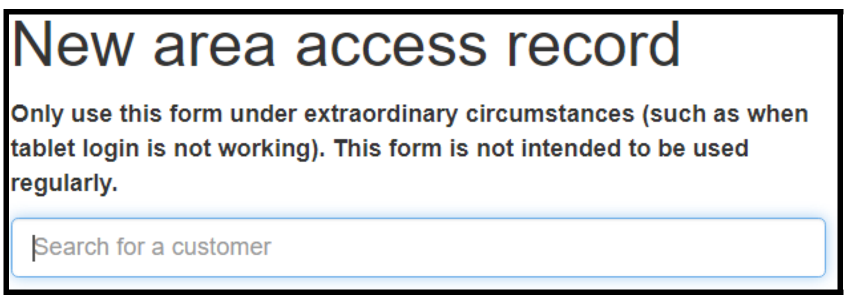


Figure 25.3: *Area access new record page*

- Enter the user name in the dialog box (Figure 25.4).

Figure 25.4: *Area access new record search dialog*

- Results are returned as characters are typed and the name of interest can be selected at any time by clicking the name on the list (Figure 25.5).

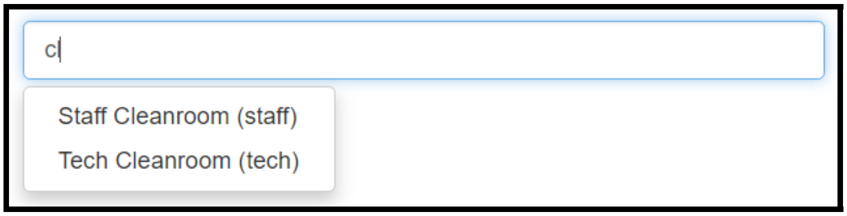


Figure 25.5: *Area access new record search list*

- If the user has multiple projects, select which project to bill time against (Figure 25.6).

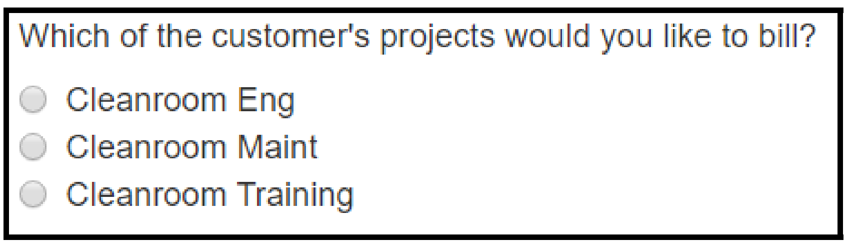


Figure 25.6: *Area access new record multiple projects*

- If the user has only one project, it will be selected automatically (Figure 25.7).

Figure 25.7: *Area access new record one project*

- If the user has access to multiple areas, select which area to log the user into (Figure 25.8).

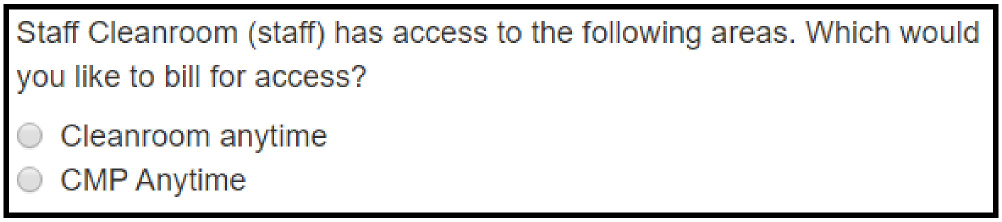


Figure 25.8: *Area access new record multiple areas*

- If the user has access to only one area, it will be selected by default (Figure 25.9).

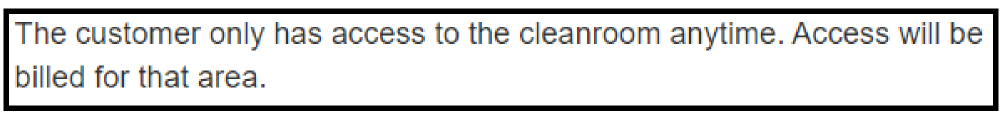


Figure 25.9: *Area access new record single area*

- Click the create area access record (Figure 25.10).

Figure 25.10: *Area access new record create button*

- The area access policy will be checked to determine if the user may access the selected area. If there is a failure, the user will be prompted with the problem (Figure 25.11).
  - The user must be active.
  - The user must be associated with an active project.
  - The user must have access to the area.
  - The user must have current unexpired physical access to the lab.
  - The user must not be currently logged into an area.
  - The user must have a physical access level that permits access at the login time.
  - The area must not be shut down as a resource.
  - The area must not be over its occupancy limit.
  - If the area requires a reservation, the user must have a reservation that encompasses the area access start time.

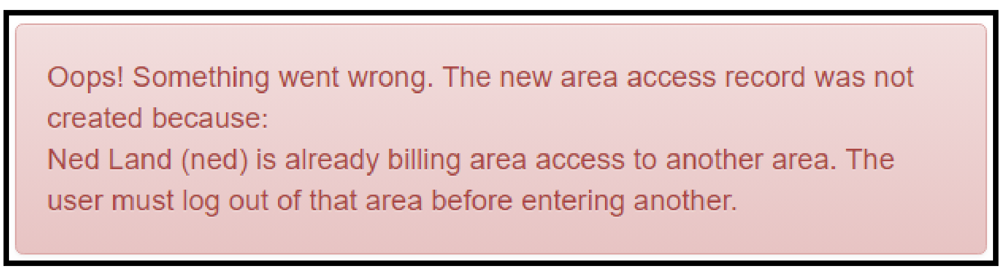


Figure 25.11: *Area access new record error dialog*

- Upon success, a new area access record will be created in the area access table of the database and a success message will be displayed (Figure 25.12).

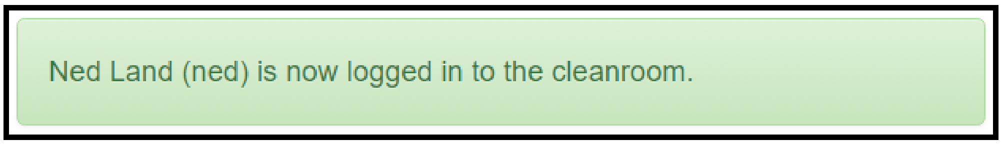


Figure 25.12: *Area access new record success message*

25.2 View access record

Area access records can be viewed for any custom date range however, two shortcuts for today and yesterday are provided (Figure 25.13).

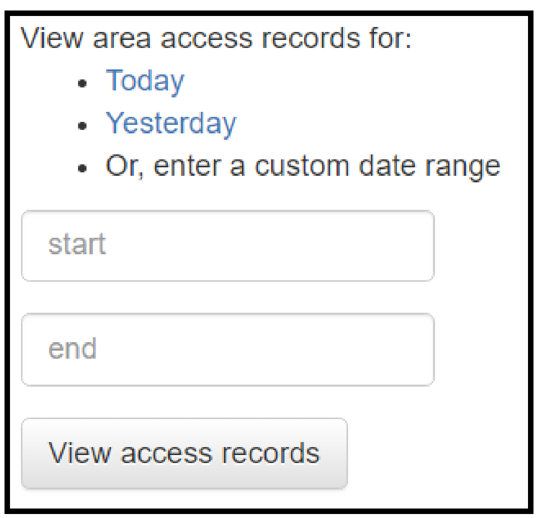


Figure 25.13: *Area access view access records*

To view area access records:

- Set a date range.
- Click the ‘Today’ quick link to populate the start and end date with the current date (Figure 25.14). The view will automatically update with any records.

Figure 25.14: *Area access view record today link*

Figure 497 Area access view record today link

  - Click the ‘Yesterday’ quick link to populate the start and end date with the previous days date (Figure 25.15). The view will automatically update with any records.

Figure 25.15: *Area access view record yesterday link*

  - Manually enter a start and end date (Figure 25.16).

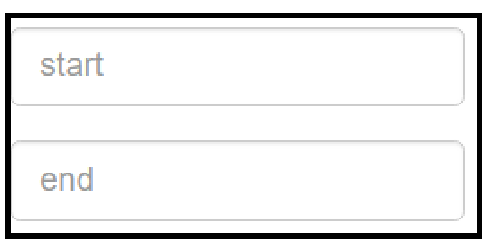


Figure 25.16: *Area access view record manual date range*

* Click in the start and end date dialog boxes directly to bring up the calendar dialog and navigate to the desired start and end date (Figure 25.17).

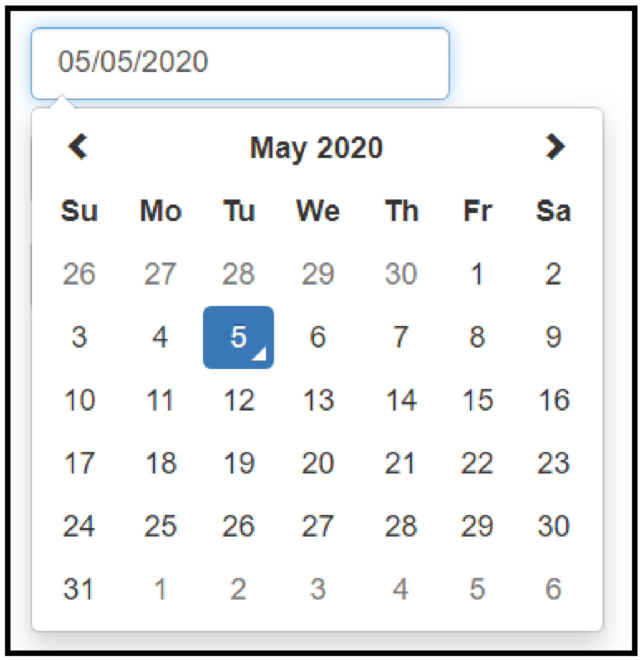


Figure 25.17: *Area access view record calendar dialog*

* Click view access records button (Figure 25.18).

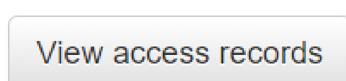
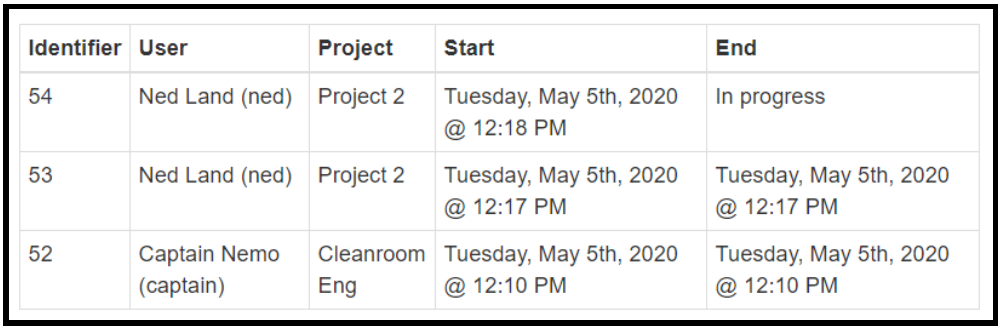


Figure 25.18: *Area access view record button*

- The page will update with access records from the selected date range (Figure 25.19). Fields returned are the record identifier, user name, project, start date/time and end date/time. If a user is currently logged into an area, the end will be indicated as “In progress”.



Identifier	User	Project	Start	End
54	Ned Land (ned)	Project 2	Tuesday, May 5th, 2020 @ 12:18 PM	In progress
53	Ned Land (ned)	Project 2	Tuesday, May 5th, 2020 @ 12:17 PM	Tuesday, May 5th, 2020 @ 12:17 PM
52	Captain Nemo (captain)	Cleanroom Eng	Tuesday, May 5th, 2020 @ 12:10 PM	Tuesday, May 5th, 2020 @ 12:10 PM

Figure 25.19: *Area access view record data*

25.3 Web address

The area access page is accessible at site-address/area_access/. The page is also accessible from the navigation bar by clicking Administration then clicking Area access.

25.4 Mobile device area access page

There are no mobile device views for the area access page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

25.5 Area access page customizations

There are no customizations for the area access page.

CHAPTER 26

Configuration agenda (staff only)

The configuration agenda is an organizational tool for staff to view all required configurations for each configurable tool on the same page and allows the configuration steps to be accomplished without navigating to other pages (Figure 26.1). Two views are available, the default current day and a near future that shows the next business day (configurable). Each tool requiring configuration is displayed and if the near future includes Saturday or Sunday, those days will be automatically included.

Tools that require staff to configure a tool for a user or when the type of usage needs to be tracked can have configurations created. Configurations are created in the configurations table of the database discussed in the Detailed administration $\rightarrow$ Configurations section 43.16. A history of configurations can be found in the configuration history table of the database discussed in the Detailed administration $\rightarrow$ Configuration histories section 43.15.

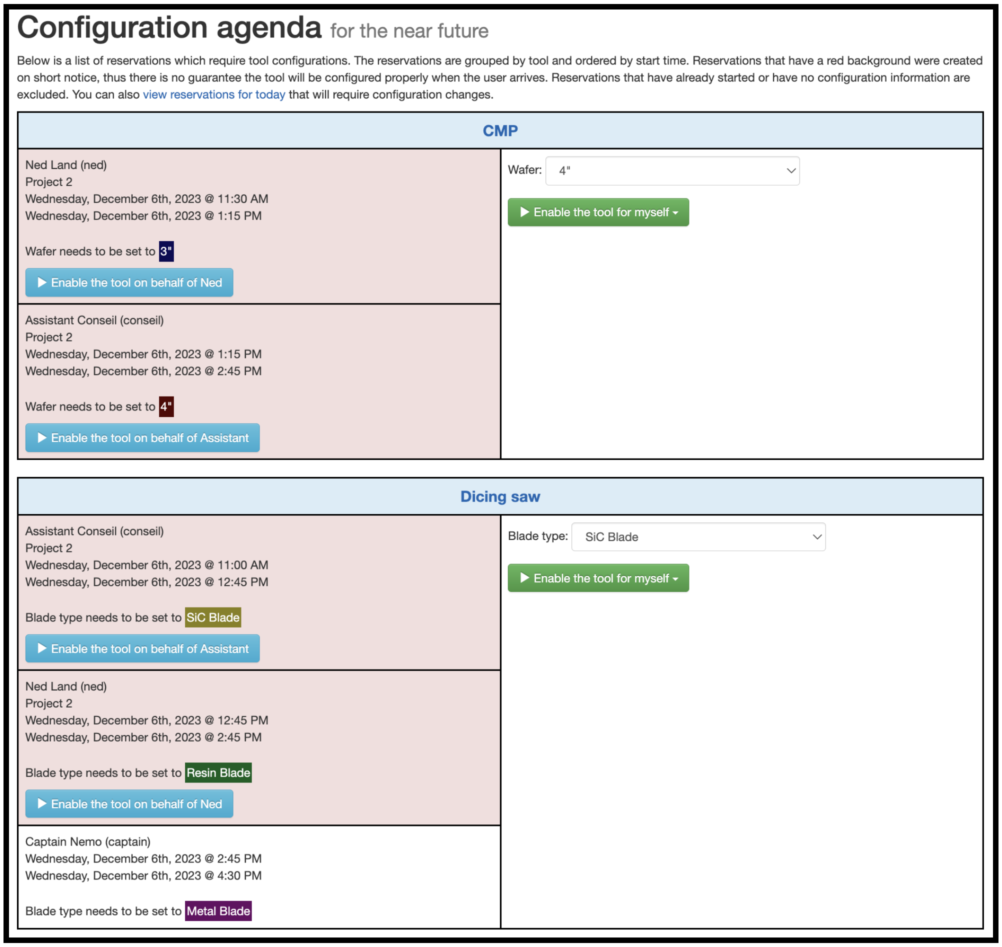


Figure 26.1: *Configuration agenda page with today view*

26.1 Usage

All configurations required in a day are displayed for each tool in order of nearest to latest. This allows planning without the need to closely monitor the reservation calendar of each tool that requires configuration. To switch to the near future view, click the link in the dialog at the top of the page (Figure 26.2).

Figure 26.2: *Configuration agenda future view link*

From the near future view, you can switch to the today view by clicking the link in the dialog at the top of the page (Figure 26.3 Configuration agenda today view link).

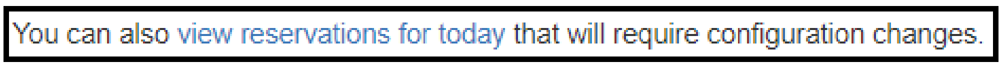


Figure 26.3: *Configuration agenda today view link*

Each tool displays the reservations on the left and the current tool configuration on the right. The tool name heading is a link to that tools calendar page.

Configurations can only be changed will the tool is idle. The configurations will be listed with a drop down and a tool enable button will be provided to facilitate quick access (Figure 26.4). Select the new configuration as needed from the drop downs. Updates are automatic and immediate.

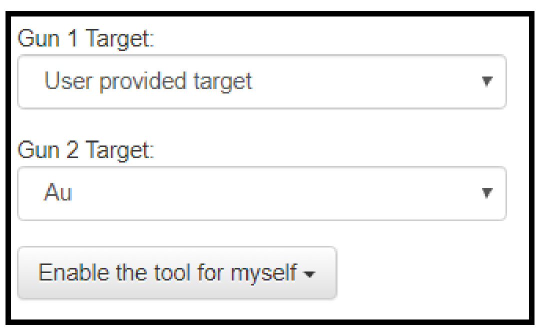


Figure 26.4: *Configuration agenda idle tool*

If a tool is enabled, the configuration will be locked, and a disable tool button will be displayed (Figure 26.5). The tool must be disabled to change the configuration however caution should be used to not impair a tool that may be currently running a process.

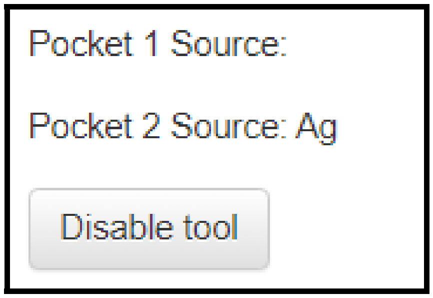


Figure 26.5: *Configuration agenda tool in use*

In some cases, it might be desirable to charge users for tool configuration changes. The user reservation dialog provides a short cut button to enable the tool on behalf of a user while the configuration is in progress (Figure 26.6).

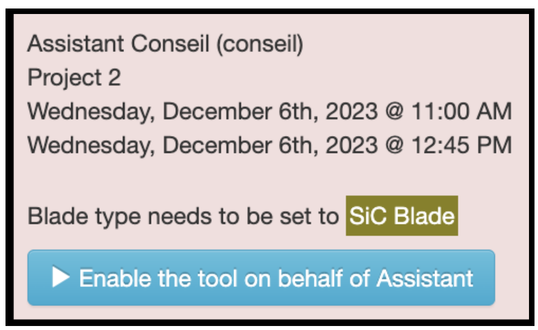


Figure 26.6: *Configuration agenda user reservation info*

26.2 Web address

The configuration agenda page is accessible at site-address/configuration_agenda/. The page is accessible from the navigation bar by clicking Administration then clicking Configuration agenda.

26.3 Mobile device configuration agenda page

There are no mobile device views for the configuration agenda page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

26.4 Configuration agenda page customizations

The number of days included in the near future window can be configured in Customization $\rightarrow$ Tool settings section 41.14.

CHAPTER 27

Email (any staff role)

The email page provides staff with an interface to send emails to users. The user groups available are users who have an account in NEMO, users qualified on certain tools, users who have an upcoming reservation on certain tools, users with access to certain areas, users working on a project, or all users working under an account (Figure 27.1).

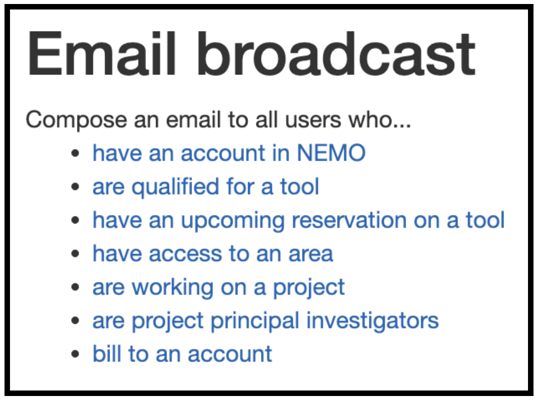


Figure 27.1: *Email page*

27.1 Usage

The email broadcast process starts with selecting the group of users to email, making some recipient selections, adding email content, then sending as detailed in the sections below.

27.1.1 Group selection

Click one of the user group links (Figure 27.2).

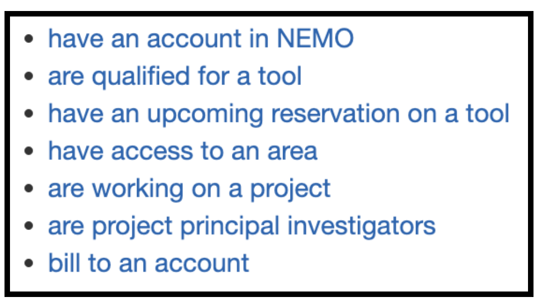


Figure 27.2: *Email groups*

A search dialog will open below the group list. Enter one or more tools, areas, projects, or accounts depending on the link selected (Figure 27.3).

Figure 27.3: *Email selection*

Results are returned as characters are typed and the item of interest can be selected at any time by clicking on the list (Figure 27.4).

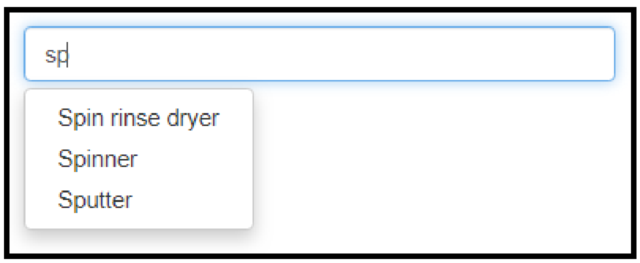


Figure 27.4: *Email selection list*

Upon clicking on the “Confirm” button, the compose email page will be opened (Figure 27.5).

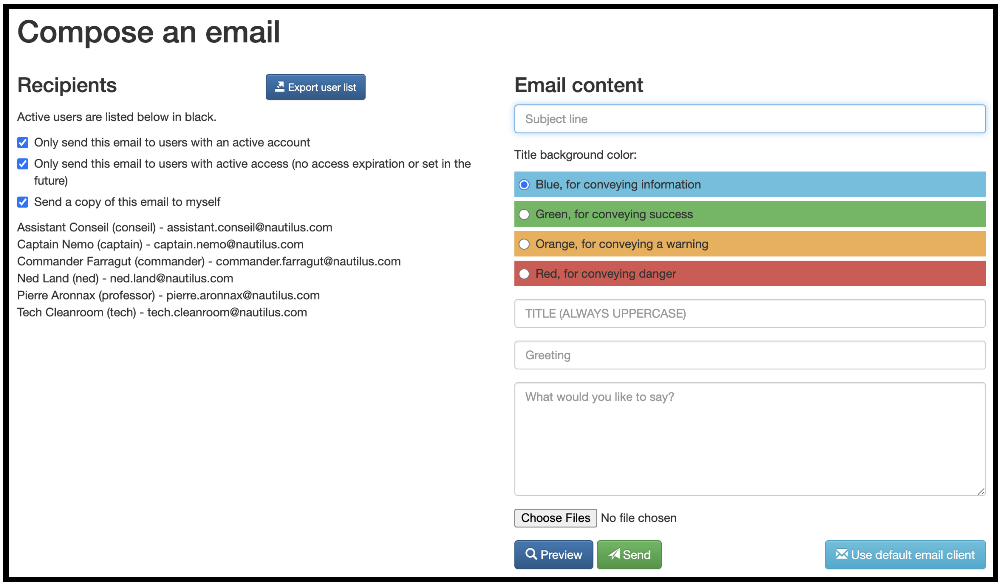


Figure 27.5: *Email compose email page*

If an email template has not been loaded yet, an error message will be displayed preventing the process from continuing (Figure 27.6).

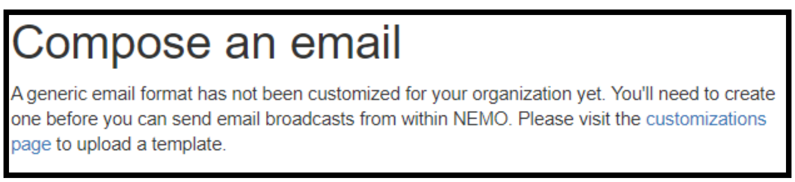


Figure 27.6: *Email compose error page*

27.1.2 Recipients

The recipients section shows all users in the group chosen and provides options to include active users/users with expired access, and to copy the sender (Figure 27.7).

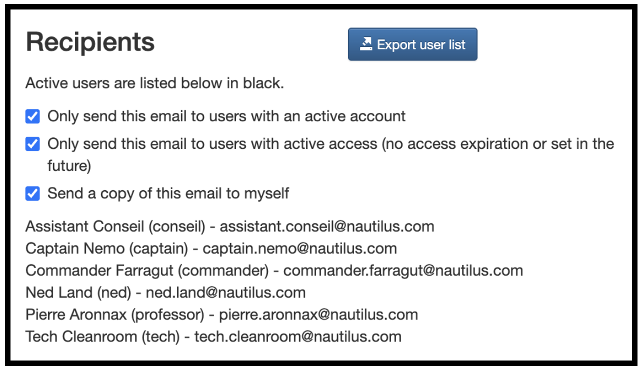


Figure 27.7: *Email recipients dialog*

By default, only active users will receive the email. Uncheck the checkbox to include all users (Figure 27.8).

Figure 27.8: *Email recipients active user checkbox*

By default, only users whose access hasn't expired will receive the email. Uncheck the checkbox to include all users (Figure 27.9).

Figure 27.9: *Email recipients active access user checkbox*

By default, the staff member sending the message will be copied. Uncheck the checkbox to not be copied (Figure 27.10).

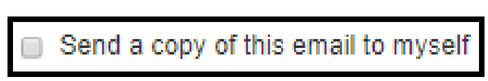


Figure 27.10: *Email recipients copy sender checkbox*

The list of recipients can be exported to use outside of NEMO, for example to load into your preferred email client. Click on the “export user list” button to get a CSV file with first name, last name, username, and email for each recipient (Figure 27.11).

Figure 27.11: *Email recipients export user list*

27.1.3 Email content

The mail content section provides options for subject, title, title color, greeting, and body (Figure 27.12).

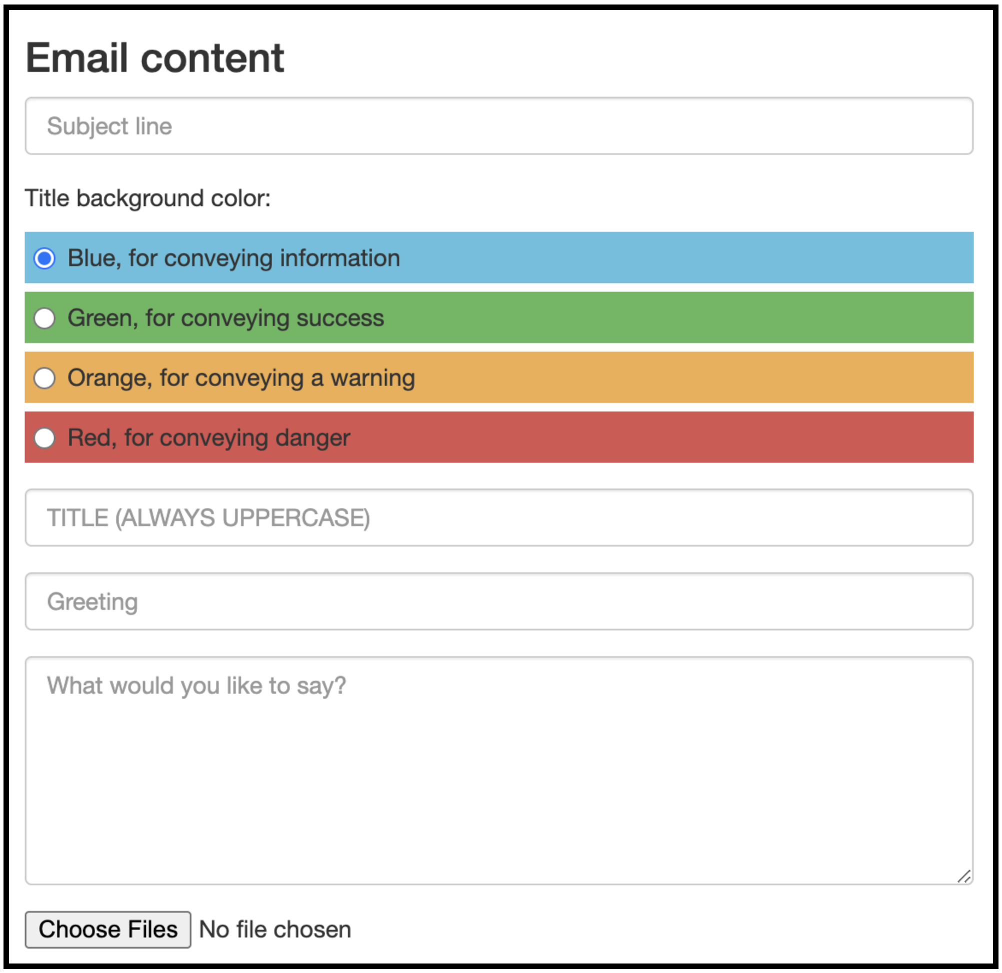


Figure 27.12: *Email content dialog*

The subject line will appear as the subject in the email (Figure 27.13). The topic will be included if only one item is selected (Figure 27.14).

Figure 27.13: *Email content subject dialog box*

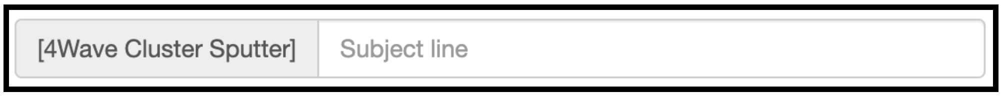


Figure 27.14: *Email content subject dialog box with topic*

The title background color can be selected to emphasize the importance of the email (Figure 27.15).

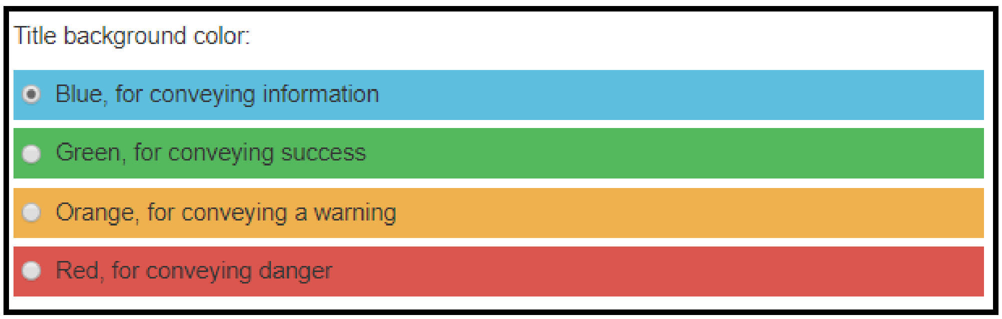


Figure 27.15: *Email content title background checklist*

The title text is entered in the title dialog box (Figure 27.16).

Figure 27.16: *Email content title dialog box*

The greeting is entered in the greeting dialog box (Figure 27.17).

Figure 27.17: *Email content greeting dialog box*

The email body is entered in the “what would you like to say?” dialog box (Figure 27.18).

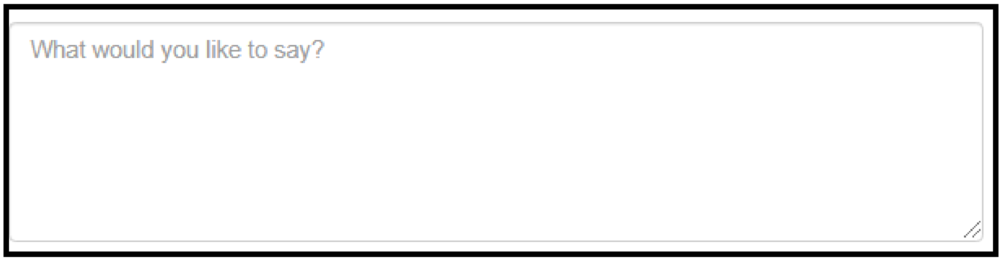


Figure 27.18: *Email content body dialog box*

Files can be attach using the “Choose files” button (Figure 27.19).

Figure 27.19: *Email attach files button*

27.1.4 Preview Email

Clicking the preview button will render the email (Figure 27.20). Changes can be made in the email form above and the preview will be updated each time the preview button is clicked.

Figure 27.20: *Email preview button*

The email preview will render below the preview button (Figure 27.21).

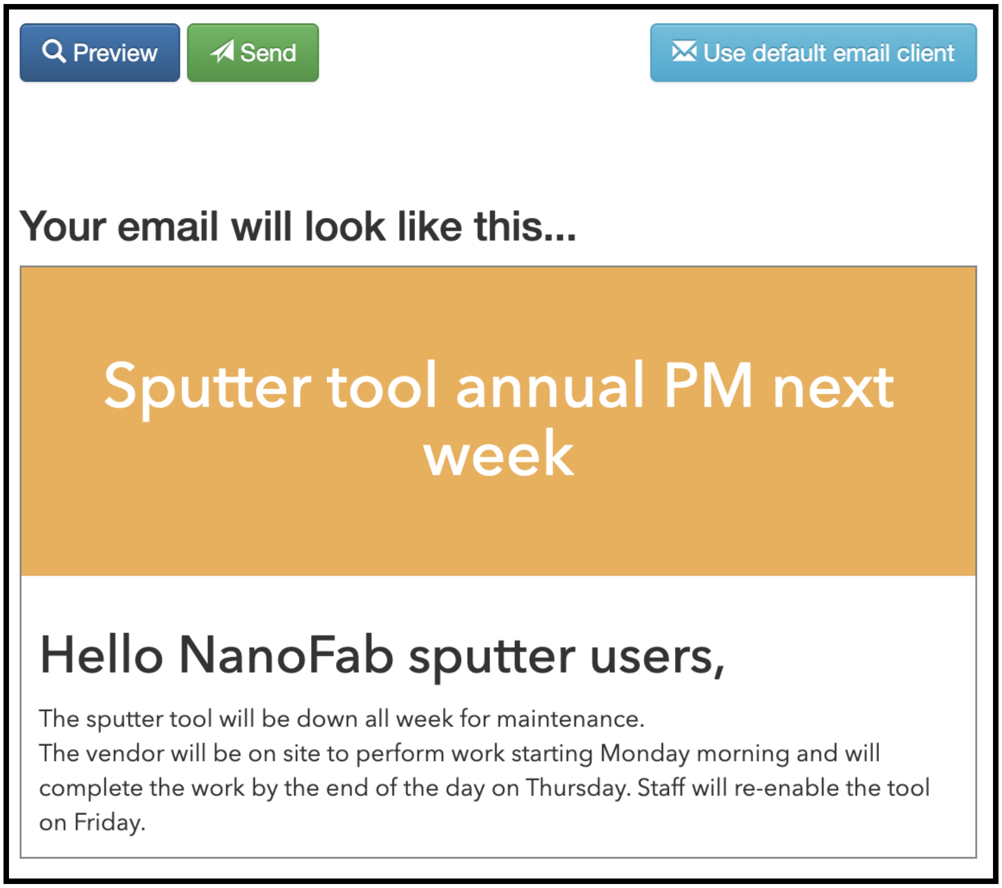


Figure 27.21: *Email rendered preview*

27.1.5 Send Email

Clicking the send button will send the message to all recipients selected (Figure 27.22).

Figure 27.22: *Email send button*

Upon successful completion, a message will be displayed (Figure 27.23).

Figure 27.23: *Email send success*

27.1.6 Send using default email client

Clicking the use default email client button will open the default email application set up on your computer and load up the recipients as bcc and the subject, title, greeting and message (Figure 27.24).

Figure 27.24: *Email use default email client button*

This feature only works if the total characters for all email addresses is less than 2000 characters. This is a limitation of the MAILTO browser functionality. The button will be disabled if that limit is reached (Figure 27.25).

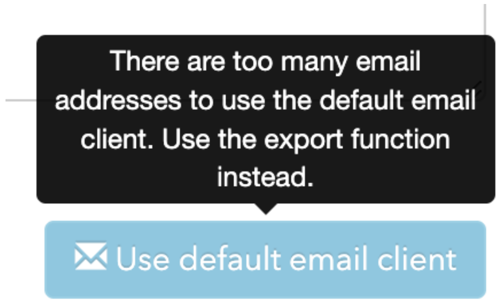


Figure 27.25: *Email use default email client button disabled*

27.2 Web address

The configuration agenda page is accessible at site-address/email_broadcast/. The page is accessible from the navigation bar by clicking Administration then clicking Email.

27.3 Mobile device email page

There are no mobile device views for the email page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

27.4 Email page customizations

Emails require a generic email template that is used to format messages. The email template is configured in the Customization $\rightarrow$ Generic email page, see subsection 41.5.13.

CHAPTER 28

Impersonate (admin/special permission only)

The impersonate feature allows an admin or user with the “can_impersonate_users” permission to impersonate any active user (Figure 28.1). This feature is useful to replicate problems a user may be having accessing different features of NEMO.

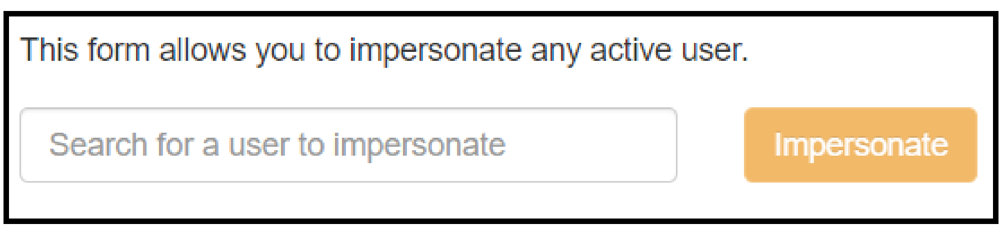


Figure 28.1: *Impersonate page*

28.1 Usage

To impersonate a user:

- Enter the users name in the search dialog box (Figure 28.2).

Figure 28.2: *Impersonate search dialog*

- A list of users is returned as characters are typed (Figure 28.3). The user can be selected from the return list at any time by clicking the users name.

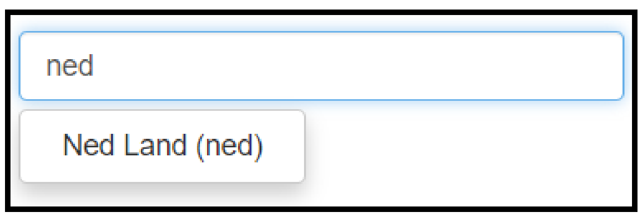


Figure 28.3: *Impersonate search dialog return list*

- If the incorrect user is selected, use the backspace to delete characters and names will be returned with each character deleted.
- Click the impersonate button to begin impersonating the selected user (Figure 28.4).

Figure 28.4: *Training record button*

- NEMO will return to the landing page and a header will appear at the top of each page indicating that you are currently impersonating another user (Figure 28.5). NEMO will act as if the selected user is currently logged in.

Figure 28.5: *Impersonate page header*

- Click the switch back button on the impersonate page header to return to normal operation (Figure 28.6).

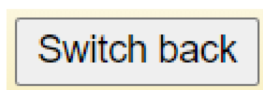


Figure 28.6: *Impersonate header switch back button*

28.2 Web address

The impersonate page is accessible at site-address/impersonate/. The page is accessible from the navigation bar by clicking Administration then clicking Impersonate.

28.3 Mobile device impersonate page

There are no mobile device views for the impersonate page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

28.4 Impersonate page customizations

There are no customizations for the impersonate page.

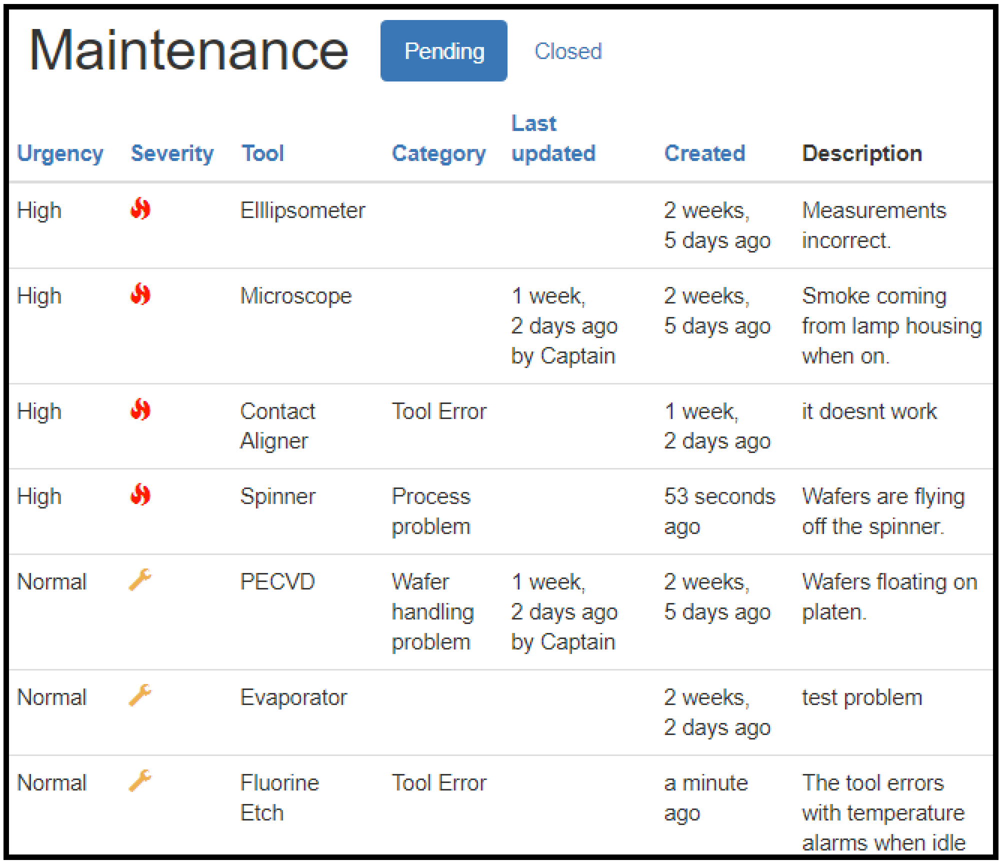
CHAPTER 29

Maintenance (staff only)

The maintenance page provides staff with a list of all pending and recently closed tasks on a single page which is useful for determining priorities across the lab. When first opening the page, it defaults to the pending tasks tab.

29.1 Pending tasks

The pending tasks tab displays urgency, severity, tool name, problem category, the last update, date created, and description for each pending task (Figure 29.1). The listing is ordered by urgency then by date created, oldest first. The list can be sorted by any heading except description by clicking the heading name.



Maintenance

Pending Closed

Urgency	Severity	Tool	Category	Last updated	Created	Description
High		Elllipsometer			2 weeks, 5 days ago	Measurements incorrect.
High		Microscope		1 week, 2 days ago by Captain	2 weeks, 5 days ago	Smoke coming from lamp housing when on.
High		Contact Aligner	Tool Error		1 week, 2 days ago	it doesnt work
High		Spinner	Process problem		53 seconds ago	Wafers are flying off the spinner.
Normal		PECVD	Wafer handling problem	1 week, 2 days ago by Captain	2 weeks, 5 days ago	Wafers floating on platen.
Normal		Evaporator			2 weeks, 2 days ago	test problem
Normal		Fluorine Etch	Tool Error		a minute ago	The tool errors with temperature alarms when idle

Figure 29.1: *Maintenance pending tasks*

Clicking on the row of any pending task will display the task details on the right side of the screen (Figure 29.2). The task details view provides important links and information about the current task to streamline access for updates.

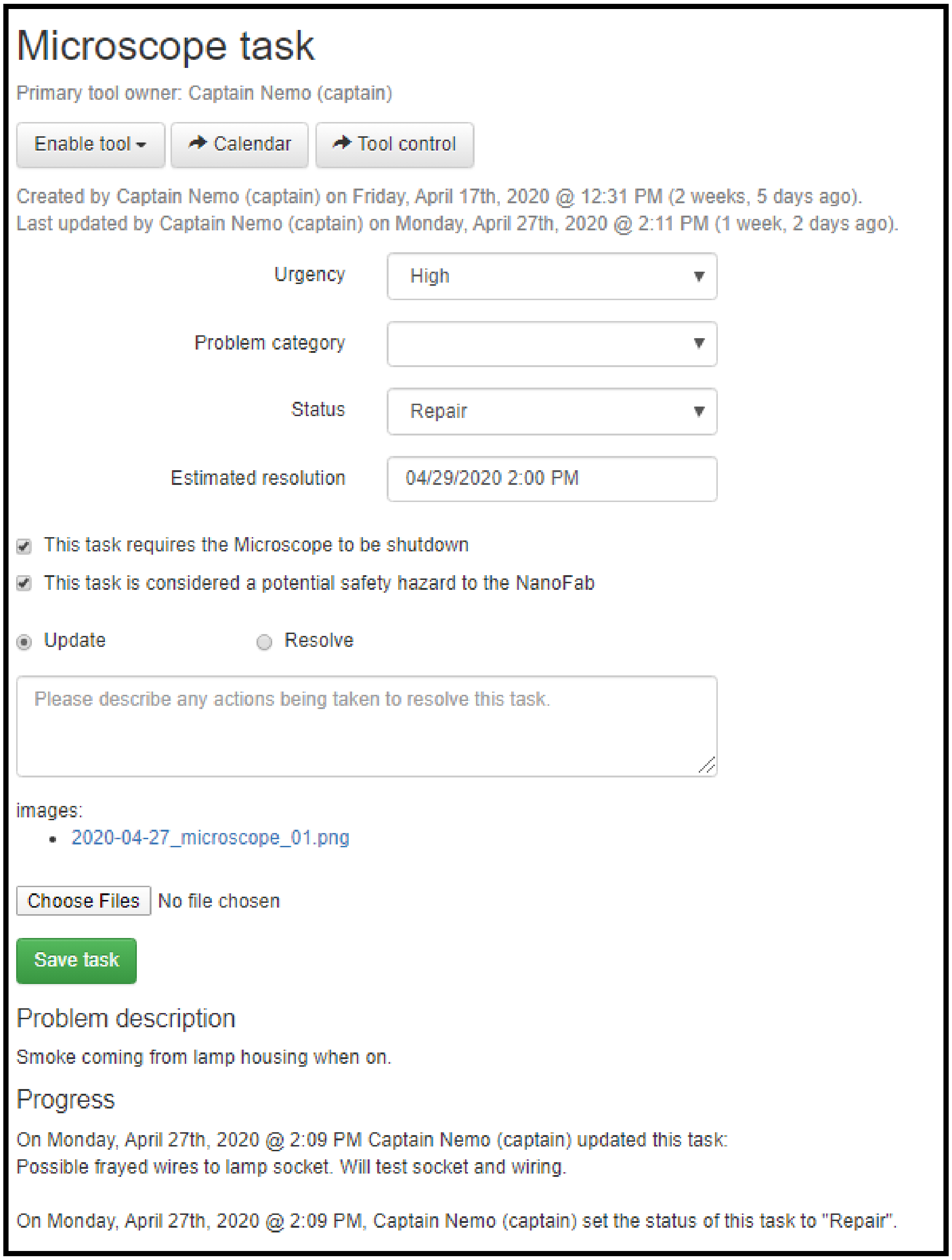


Figure 29.2: *Maintenance pending task details*

The pending task details contains the following information:

- Tool name (Figure 29.3)

Figure 29.3: *Maintenance pending task tool name*

- Primary tool owner (Figure 29.4)

Figure 29.4: *Maintenance pending task primary tool owner*

- Quick link buttons – quick link buttons are provided to streamline common operations while performing maintenance to resolve tasks.
  - Enable/disable the tool.
  - Enable tool, single project – click enable tool to start logging time (Figure 29.5).

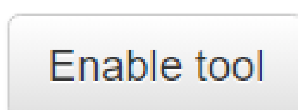


Figure 29.5: *Maintenance pending task enable tool button*

* Enable tool, multiple projects – click enable button to reveal dropdown list of projects (Figure 29.6). Select a project from the list to start logging time (Figure 29.7).

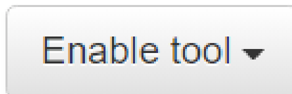


Figure 29.6: *Maintenance pending task enable tool button multiple projects*

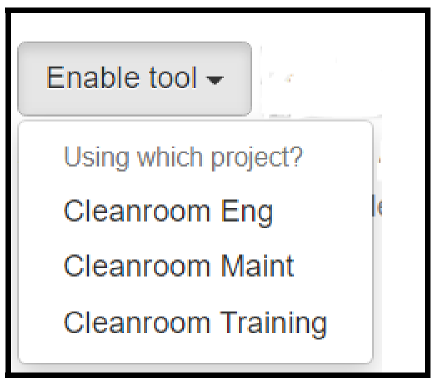


Figure 29.7: *Maintenance pending task multiple projects list*

* Disable tool – click to stop logging time on a tool (Figure 29.8). In the maintenance mode of operation, the disable tool is immediate, and the user is not prompted for logout questions.

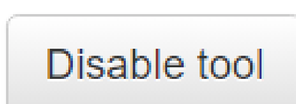


Figure 29.8: *Maintenance pending task disable tool button*

- Navigate to the calendar page for the tool – this link will open the calendar page in a new tab and select the task subject tool (Figure 29.9).

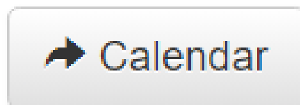


Figure 29.9: *Maintenance pending task calendar page link*

- Navigate to the tool control page for the tool – this link will open the tool control page in a new tab and select the task subject tool (Figure 29.10).

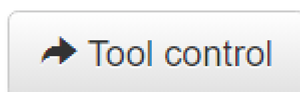


Figure 29.10: *Maintenance pending task tool control page link*

- Who created the task and when (Figure 29.11)

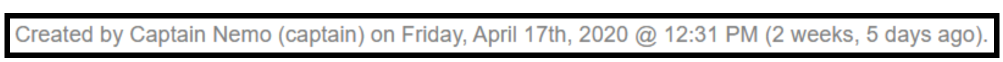


Figure 29.11: *Maintenance pending task creation info*

- Who last updated the task and when (Figure 29.12)

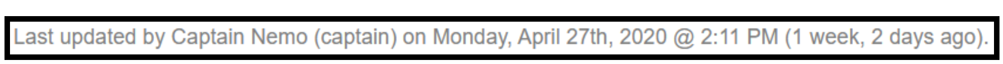


Figure 29.12: *Maintenance pending task update info*

- Update the task
  - The current urgency is displayed (Figure 29.13). Shutdowns and safety problems default to high urgency while problems default to normal urgency. To update, use the dropdown to change the task urgency to high, normal, or low (Figure 29.14).

Figure 29.13: *Maintenance pending task urgency*

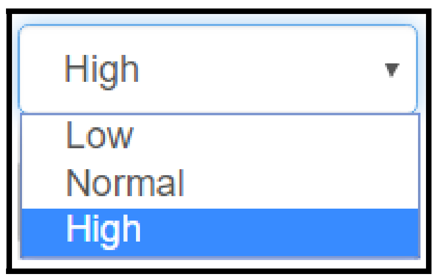


Figure 29.14: *Maintenance pending task urgency dropdown*

- The current problem category is displayed only if task categories have been defined in the task categories table of the database (Figure 29.15). Task categories are discussed in the Detailed administration $\rightarrow$ Task categories section 43.56. To update, use the dropdown to change the problem category (Figure 29.16).

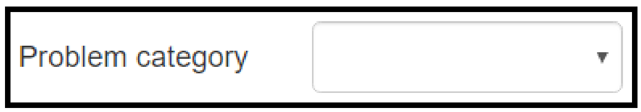


Figure 29.15: *Maintenance pending task problem category*

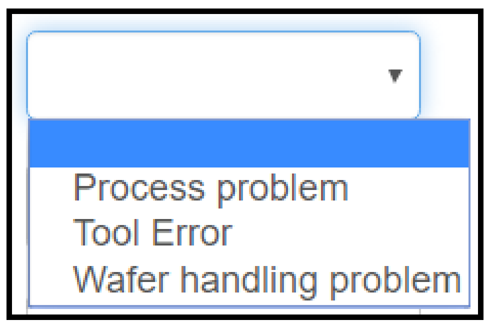


Figure 29.16: *Maintenance pending task problem category dropdown*

– The current status is displayed only if task statuses have been defined in the task statuses table of the database (Figure 29.17). Task statuses are discussed in the Detailed administration → Task statuses section 43.57. To update, use the dropdown to change the task status (Figure 29.18).

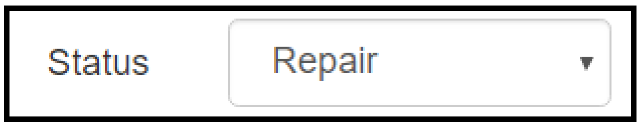


Figure 29.17: *Maintenance pending task status*

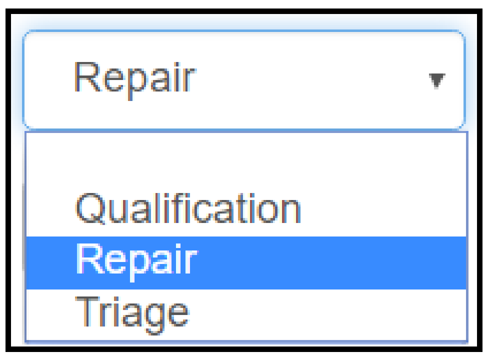


Figure 29.18: *Maintenance pending task status dropdown*

– The current estimated resolution time is displayed (Figure 29.19). To update, click the dialog box to open the clock-calendar dialog (Figure 29.20). Select the new date and time estimate. The dialog box is updated as the calendar and clock are clicked.

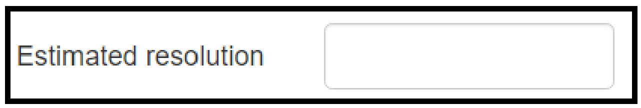


Figure 29.19: *Maintenance pending task estimated resolution*

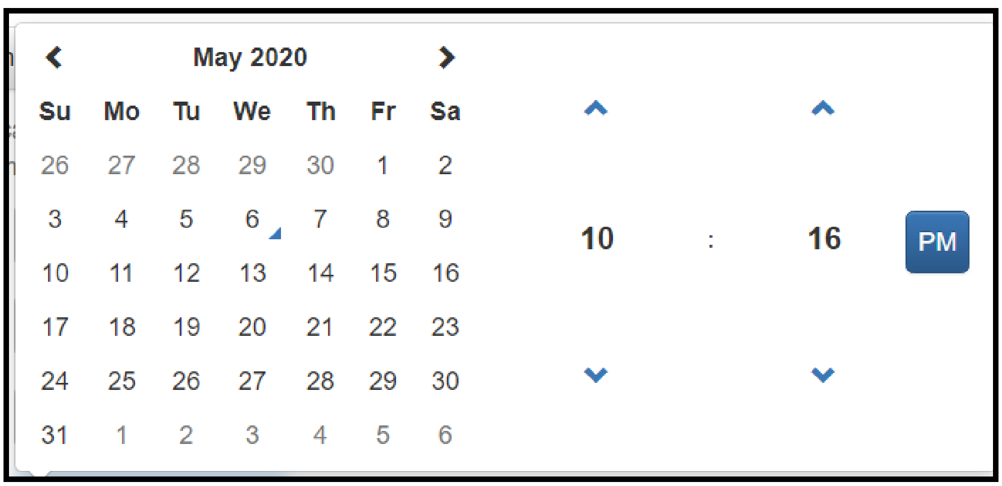


Figure 29.20: *Maintenance pending task estimated resolution clock/calendar*

- The current shutdown status is displayed (Figure 29.21). To update click the checkbox to select or deselect as needed.

Figure 29.21: *Maintenance pending task shutdown status*

- The current safety hazard status is displayed (Figure 29.22). To update click the checkbox to select or deselect as needed.

Figure 29.22: *Maintenance pending task safety hazard status*

- Use the radio button to select update or resolve for the task (Figure 29.23). Selecting resolve will show the resolution category below the details dialog if resolution categories have been defined.

Figure 29.23: *Maintenance pending task update or resolve radio*

- Provide update or resolution details that describe any actions taken (Figure 29.24).

Figure 29.24: *Maintenance pending task update details*

- The resolution category is displayed only if the resolve radio button is selected, and task categories have been defined in the task categories table of the database (Figure 29.25). Task categories are discussed in the Detailed administration → Task categories section 43.56. To update, use the dropdown to change the resolution category (Figure 29.26).

Figure 29.25: *Maintenance pending task resolution category*

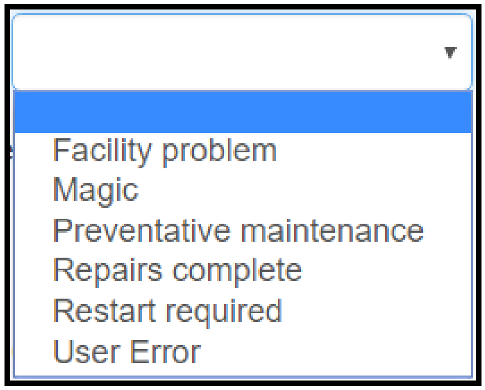


Figure 29.26: *Maintenance pending task resolution category dropdown*

- The image listing is only displayed if images have been uploaded previously (Figure 29.27). Clicking on an image will open it in a new tab.

Figure 29.27: *Maintenance pending task uploaded images*

- The choose files dialog may be used to upload any relevant pictures to show details that support the description (Figure 29.28). Clicking the button activates a standard file selection dialog. Multiple files can be uploaded. Note: it is good practice to make note of the files in the description to link the file to the text.

Figure 29.28: *Maintenance pending task upload new images*

- Click the save button to commit the update/resolution (Figure 29.29).

Figure 29.29: *Maintenance pending task save button*

- The problem description is displayed for information (Figure 29.30).

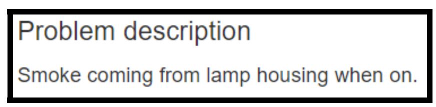


Figure 29.30: *Maintenance pending task problem description*

- The progress to date is displayed for information (Figure 29.31).

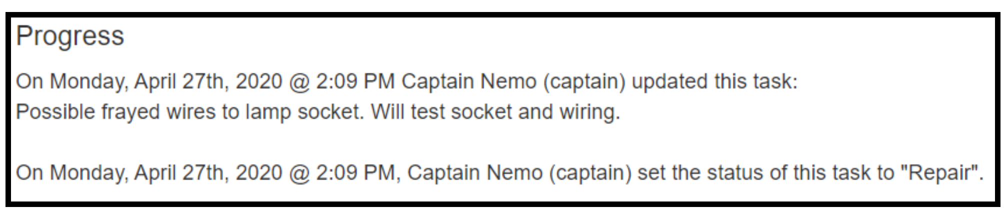


Figure 29.31: *Maintenance pending task progress*

- Tool configuration
  - Disabled tool — tool configurations are changeable (Figure 29.32). Use the dropdown to select a different configuration from the list. Changes take effect immediately on selection.

Figure 29.32: *Maintenance pending task configuration update*

  - Enabled tool – the current tool configuration is displayed for information (Figure 29.33).

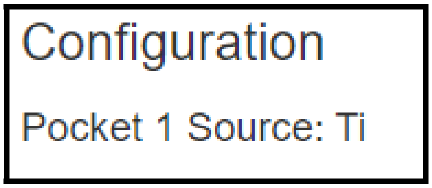
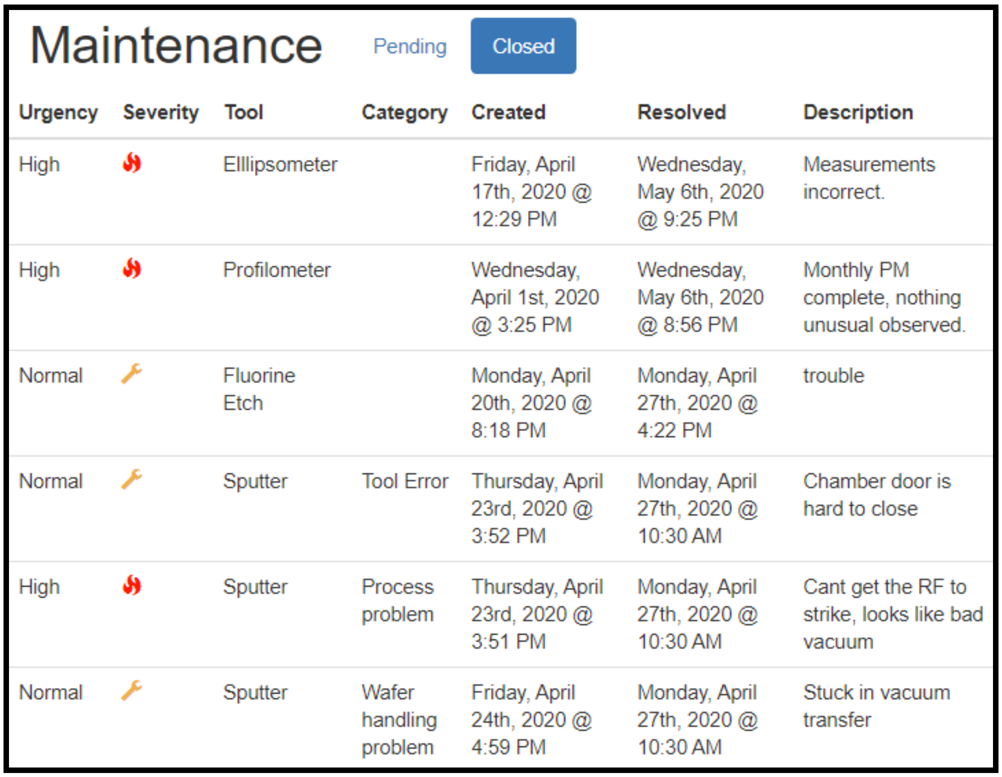


Figure 29.33: *Maintenance pending task configuration*

29.2 Closed tasks

The closed tasks tab displays urgency, severity, tool name, problem category, date created, date resolved, and description for up to 20 closed tasks (Figure 29.34). The listing is ordered by date closed, more recent closure first. The list can be sorted by any heading except description by clicking the heading name.



Maintenance Pending Closed

Urgency	Severity	Tool	Category	Created	Resolved	Description
High		Elllipsometer		Friday, April 17th, 2020 @ 12:29 PM	Wednesday, May 6th, 2020 @ 9:25 PM	Measurements incorrect.
High		Profilometer		Wednesday, April 1st, 2020 @ 3:25 PM	Wednesday, May 6th, 2020 @ 8:56 PM	Monthly PM complete, nothing unusual observed.
Normal		Fluorine Etch		Monday, April 20th, 2020 @ 8:18 PM	Monday, April 27th, 2020 @ 4:22 PM	trouble
Normal		Sputter	Tool Error	Thursday, April 23rd, 2020 @ 3:52 PM	Monday, April 27th, 2020 @ 10:30 AM	Chamber door is hard to close
High		Sputter	Process problem	Thursday, April 23rd, 2020 @ 3:51 PM	Monday, April 27th, 2020 @ 10:30 AM	Cant get the RF to strike, looks like bad vacuum
Normal		Sputter	Wafer handling problem	Friday, April 24th, 2020 @ 4:59 PM	Monday, April 27th, 2020 @ 10:30 AM	Stuck in vacuum transfer

Figure 29.34: *Maintenance closed tasks*

Clicking on the row of any closed task will display the task details on the right side of the screen (Figure 29.35).

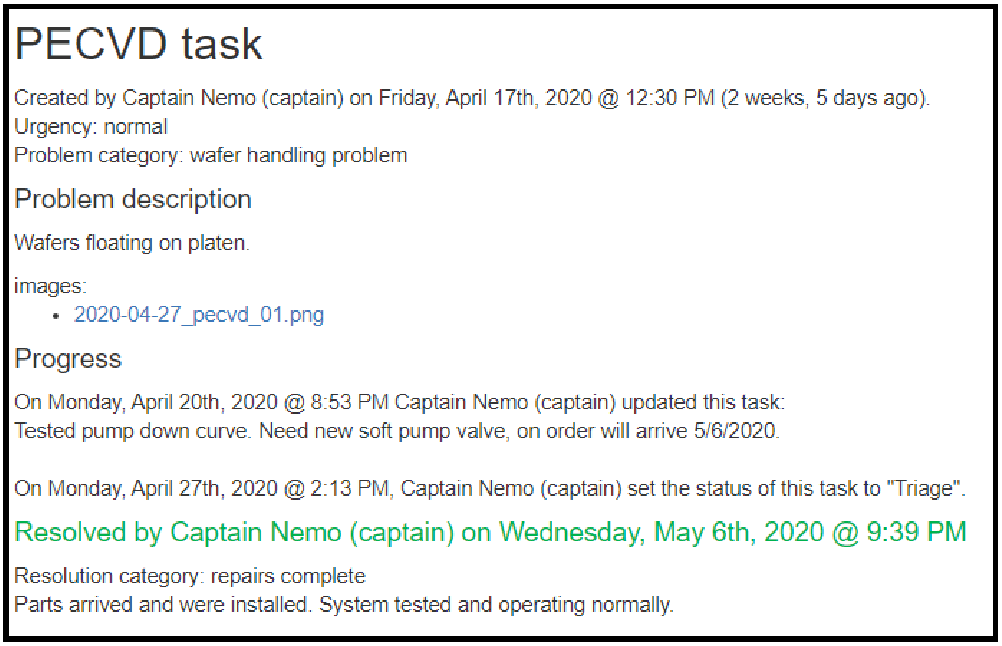


Figure 29.35: *Maintenance closed task details*

All details and updates are listed including the initial task information, problem description, progress updates, and resolution information. Any images associated with the task are linked and can be open by clicking the links.

29.3 Web address

Web address The maintenance page is accessible at site-address/maintenance/. For example, www.nemo.com/maintenance/. The page is accessible from the navigation bar by clicking Administration then clicking Maintenance.

29.4 Mobile device maintenance page

There are no mobile device views for the maintenance page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

29.5 Maintenance page customizations

- Tools for which to display maintenance tasks can be limited to a subset of tools in User preferences → Tool maintenance and notifications, see section 19.1.6
- The number of closed tasks returned is set in the maintenance.py file, maintenance function, closed_tasks = statement. Change [:20] to the number of closed tasks to return.

CHAPTER 30

Qualifications (staff only)

The qualifications page provides a convenient interface for performing batch qualification or disqualification for one or more users on one or more tools (Figure 30.1).

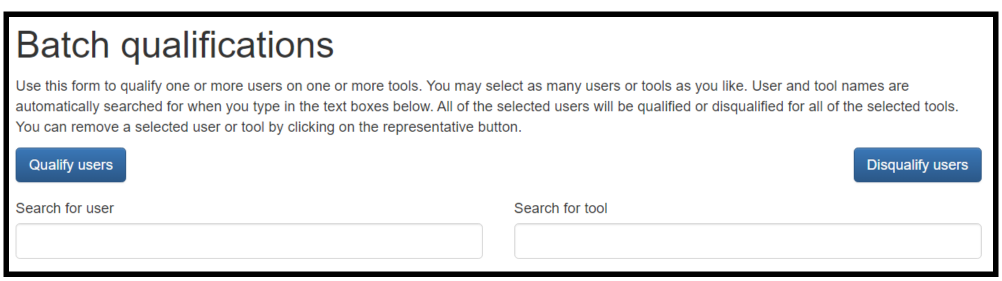


Figure 30.1: *Qualifications page*

30.1 Tool qualifications

Users can be qualified on tools through several interfaces within NEMO. Each has its particular value.

- Tool control page discussion 6 – users may be qualified or disqualified one at a time on the tool displayed. If the selected tool is configured to grant a physical access level to the user upon qualification, the users access level will be updated.
- Qualifications page discussion 30 – many users may be qualified or disqualified on many tools at the same time. If a selected tool is configured to grant a physical access level to the user upon qualification, the users access level will be updated.
- Training page discussion 37 – many users may be qualified on many tools at the same time. In addition, training type and time will be recorded. If a selected tool is configured to grant a physical access level to the user upon qualification, the users access level will be updated.
- Users page discussion 39 – the selected user may be qualified or disqualified on one tool at a time. The users physical access level is not updated.
- Tool table in the database discussion 43.64 – many users may be qualified or disqualified on a single tool. The users physical access level is not updated.

30.2 Usage

30.2.1 Select users

- Select one or more users by typing the first users name in the search for user dialog (Figure 30.2).

Figure 30.2: *Qualifications user search dialog*

- Results are returned as characters are typed and the name of interest can be selected at any time by clicking on the list (Figure 30.3).

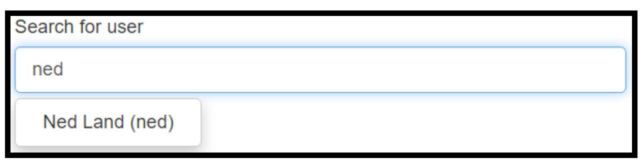


Figure 30.3: *Qualifications user search dialog return list*

- After clicking the user will be listed below the search dialog (Figure 30.4).

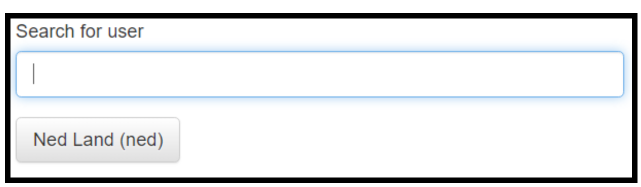


Figure 30.4: *Qualifications user search name added*

- If a user is selected by mistake, click the users name below the search dialog to remove them from the list (Figure 30.5).

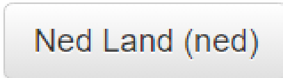


Figure 30.5: *Qualifications user search name button*

- Repeat for each user to be qualified or disqualified.

30.2.2 Select tools

- Select one or more tools or tool groups by typing the tool name in the search for tool dialog (Figure 30.6).

Figure 30.6: *Qualifications tool search dialog*

- Results are returned as characters are typed and the tool or tool group of interest can be selected at any time by clicking on the list (Figure 30.7).

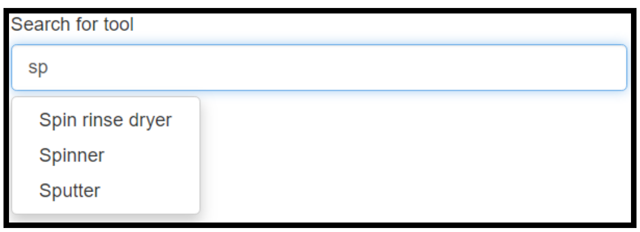


Figure 30.7: *Qualifications tool search return list*

- After clicking the tool or tool group will be listed below the search dialog (Figure 30.8).

Figure 30.8: *Qualifications tool search tool added*

- If a tool or tool group is selected by mistake, click the tool name below the search dialog to remove it from the list (Figure 30.9).

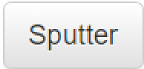


Figure 30.9: *Qualifications tool search name button*

- Repeat for each tool or tool group to be qualified or disqualified.

30.2.3 Qualify or disqualify users

- Qualify users – click the qualify users button to qualify the selected users on the selected tools (Figure 30.10). If a tool is configured to grant a physical access level to the user upon qualification, the users access level will be updated. Granting access levels for tools is discussed in the Detailed administration → Tools section 43.64.

Figure 30.10: *Qualifications qualify button*

- Disqualify users – click the disqualify users button to disqualify the selected users on the selected tools (Figure 30.11).

Figure 30.11: *Qualifications disqualify button*

- Change status – upon selection of either qualify or disqualify, the selected updates will be made. A success message will be shown (Figure 30.12). Click the continue button to return to the NEMO home page. Note: to be successful, at least one user and one tool must be selected. If not, the user will be prompted to correct the problem.

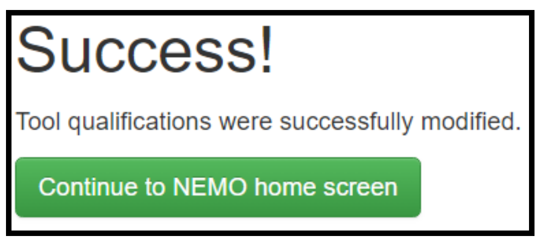


Figure 30.12: *Qualifications success message*

30.3 Web address

The qualifications page is accessible at site-address/qualifications/. The page is accessible from the navigation bar by clicking Administration then clicking Qualifications.

30.4 Mobile device qualifications page

There are no mobile device views for the qualifications page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

30.5 Qualifications page customizations

There are a few customizations available for automatically expiring tool qualifications for users. They are discussed in the Customizations → User section 41.16.

CHAPTER 31

Recurring charges (user office and managers only)

The recurring charges page allows to charge for supplies/consumables at regular intervals (Figure 31.1). For example, it can be used to record storage bin rentals or cleanroom gown rentals. Supplies are setup in the consumables table of the database detailed in the Detailed administration $\rightarrow$ Consumables section 43.19.

Chapter 31 Recurring charges (user office and managers only)

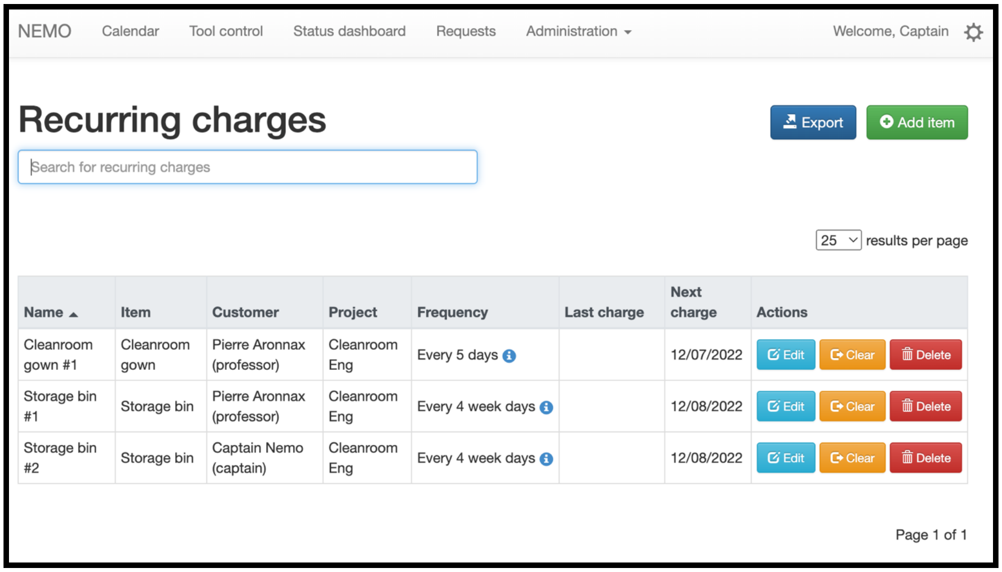


Figure 31.1: *Recurring charges page*

31.1 Usage

31.1.1 Create recurring charge

To create a new recurring charge:

- Click the new item button on the recurring charges page (Figure 31.2).

Figure 31.2: *Recurring charges new item button*

- The new item dialog will open (Figure 31.3).

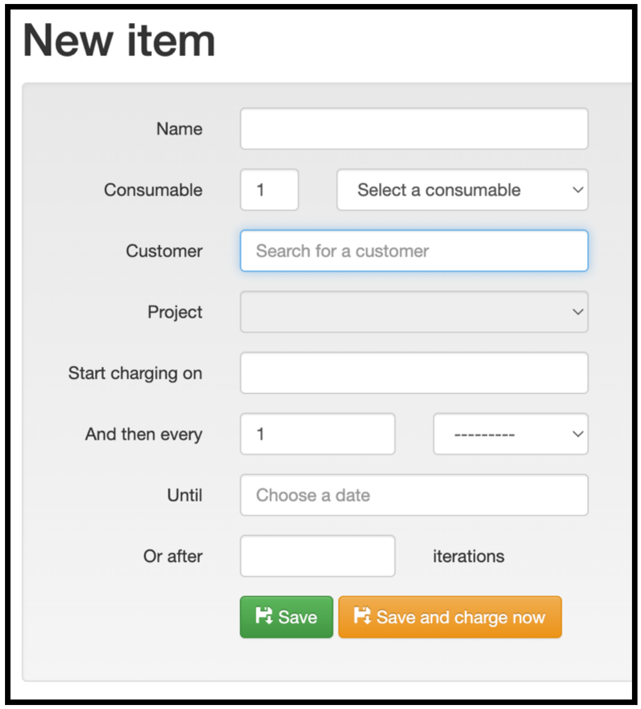


Figure 31.3: *Recurring charges new item dialog*

- Enter the item name in the name dialog box (Figure 31.4).

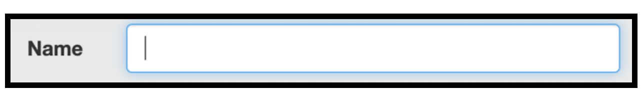


Figure 31.4: *Recurring charges new item name*

- Select the consumable and its quantity in dialog box and selector (Figure 31.5).

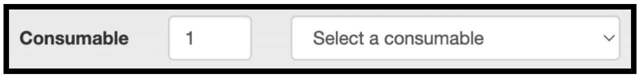


Figure 31.5: *Recurring charges new item consumable*

- All other fields are optional unless you are also trying to charge for the recurring charge right away, in which case all fields except the end date will be required.
- Enter the customer's name in dialog box (Figure 31.6).

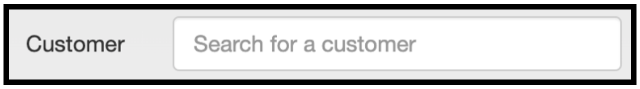


Figure 31.6: *Recurring charges new item customer*

- Results are returned as characters are typed and the name of interest can be selected at any time by clicking the name on the list (Figure 31.7).

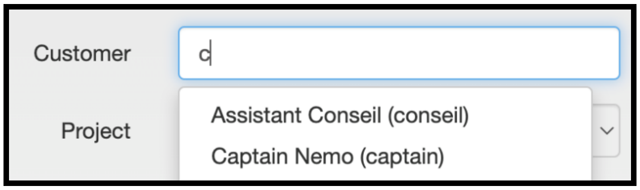


Figure 31.7: *Recurring charges new item customer list*

- After selecting the customer, select the project to bill in the selector (Figure 31.8).

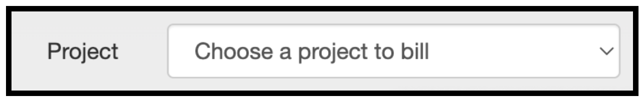


Figure 31.8: *Recurring charges new item project*

- Enter the date to start charging on (Figure 31.9).

Figure 31.9: *Recurring charges new item charge date*

- Select the charge frequency (Figure 31.10).

Figure 31.10: *Recurring charges new item charge frequency*

- Select an optional end for the recurring charge. This is optional. If not filled, the charges will continue indefinitely (Figure 31.11).

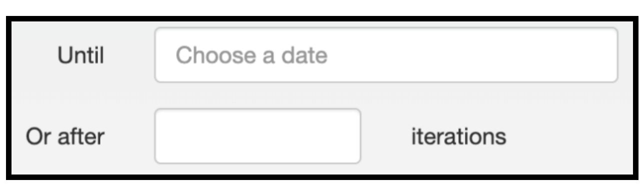


Figure 31.11: *Recurring charges new item end options*

- Click the save button (Figure 31.12) to confirm.

Figure 31.12: *Recurring charges new item save button*

- Alternatively, you can click the save and charge now button (Figure 31.13) to confirm and charge the first occurrence right away.

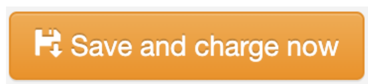


Figure 31.13: *Recurring charges new item save and charge now button*

- The new recurring charge is recorded in the recurring charges table of the database detailed in the Detailed administration → Recurring charges section 43.37.
- The page will redirect back to the recurring charges page.

31.1.2 Editing recurring charge item

From the recurring charge list page, click on the Edit button (Figure 31.14). The same fields as shown in the previous section will be shown and editable (unless the recurring charges are locked, see below).

Figure 31.14: *Recurring charges edit button*

31.1.3 Clearing recurring charge item

From the recurring charge list page, click on the Clear button (Figure 31.15). This will remove the customer from this recurring charge and reset the last charge date, allowing a new customer to be assigned to it.

Figure 31.15: *Recurring charges clear button*

31.1.4 Deleting recurring charge item

From the recurring charge list page, click on the Delete button (Figure 31.16). A confirmation dialog will appear. Upon confirmation, the recurring charge item will be removed.

Figure 31.16: *Recurring charges delete button*

31.1.5 Locking recurring charges

In the Detailed administration → Recurring charges section 43.37, select the option to lock recurring charges. Locking recurring charges is useful to keep the current name, consumable and charge frequency locked except for facility managers. User office staff can only assign the items and charge them but cannot edit anything else (Figure 31.17).

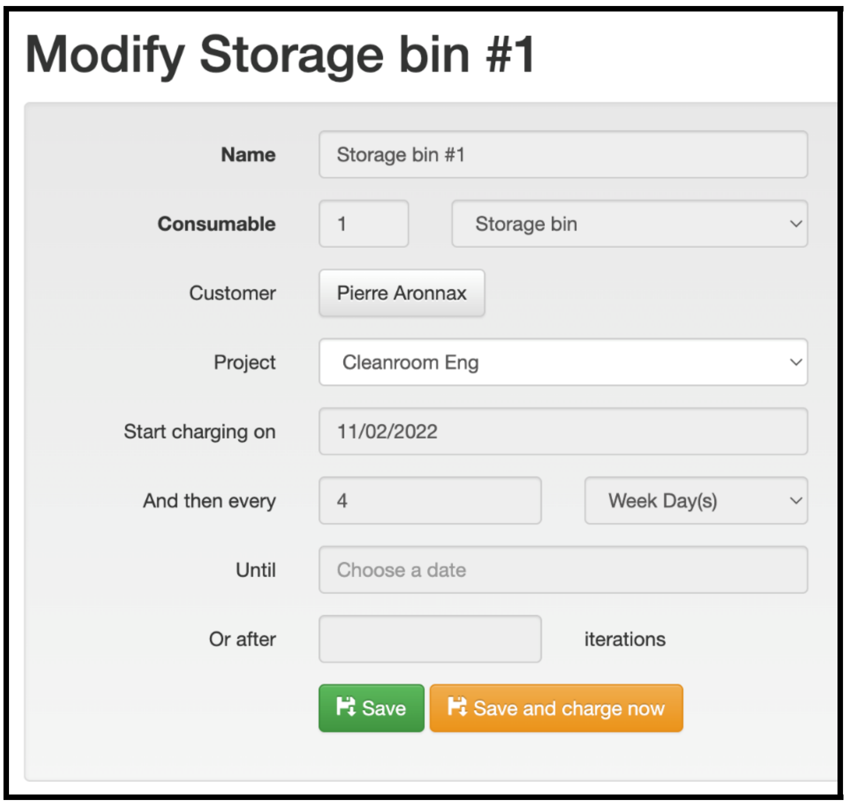


Figure 31.17: *Recurring charges locked form*

31.1.6 Recurring charges validation

If there are any potential issues with charging for an item, the entire row will be highlighted in red (Figure 31.18). Hovering over the row will provide more information about the issue. Potential errors are item expired (end date or occurrences reached), customer error (inactive or access expired) or project error (project or account inactive, consumable withdraw not allowed).

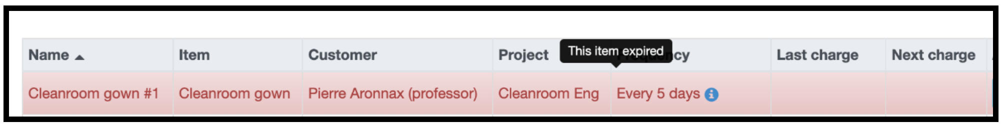


Figure 31.18: *Recurring charges item expired*

31.1.7 Customer upcoming charges reminder

For customers to receive reminders of their upcoming charges, the Recurring charges reminder email template must be set in Customization → File and email templates → Reorder supplies reminder email, see subsection 41.5.18. By default, users will receive reminders 2 months prior to a recurring charge and another reminder one week prior. These parameters can be changed for each user individually in their user preferences (Figure 31.19). User preferences are discussed in depth in the User Preferences section.

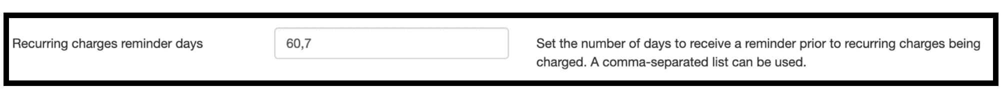


Figure 31.19: *Recurring charges reminder days*

31.2 Web address

The recurring charges page is accessible at site-address/recurring_charges/. The page is accessible from the navigation bar by clicking Administration then clicking Recurring charges.

31.3 Mobile device recurring charges page

There are no mobile device views for the recurring charges page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

31.4 Recurring charges page customizations

Recurring charges page customizations There are several customizations available for recurring charges. They are discussed in the Customizations → Recurring charges section 43.37.

CHAPTER 32

Remote Work (staff only)

32.1 Staff charges

The staff charges page provides an interface to manage work performed by staff on behalf of users. The page can take several forms depending on what a staff member is currently doing on behalf of a user.

32.1.1 Usage

- If a staff member is not performing any work on behalf of a user, a dialog will be displayed to select a user (Figure 32.1).

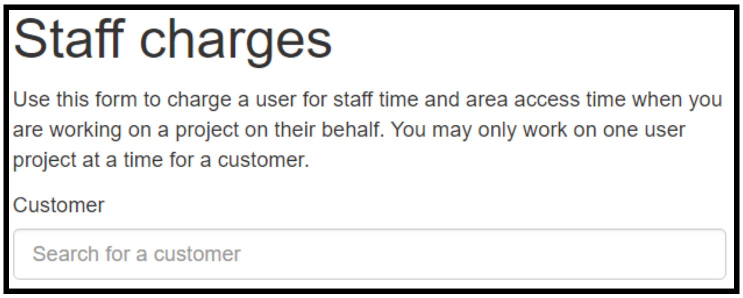


Figure 32.1: *Staff charge page, staff not currently working on behalf of user*

- Enter a user name in the search dialog (Figure 32.2).

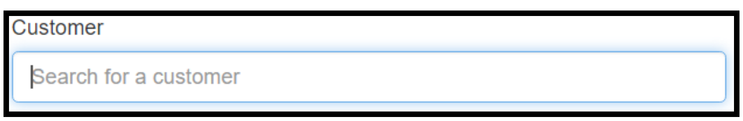


Figure 32.2: *Staff charge user search dialog*

- A list of users is returned as characters are typed (Figure 32.3). The user can be selected from the return list at any time by clicking the name.

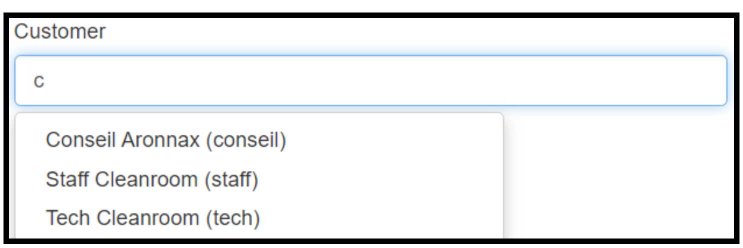


Figure 32.3: *Staff charge user search return list*

- If the user has only one project, it will be listed and automatically selected (Figure 32.4).

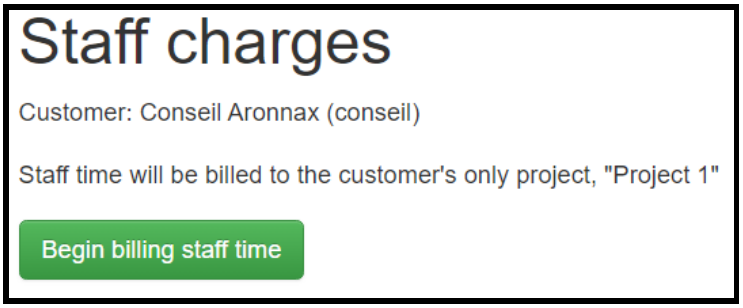


Figure 32.4: *Staff charge user with one project*

- If the user has multiple projects, a list of projects will be returned to select from (Figure 32.5). Click one of the available projects to select it (Figure 32.6).

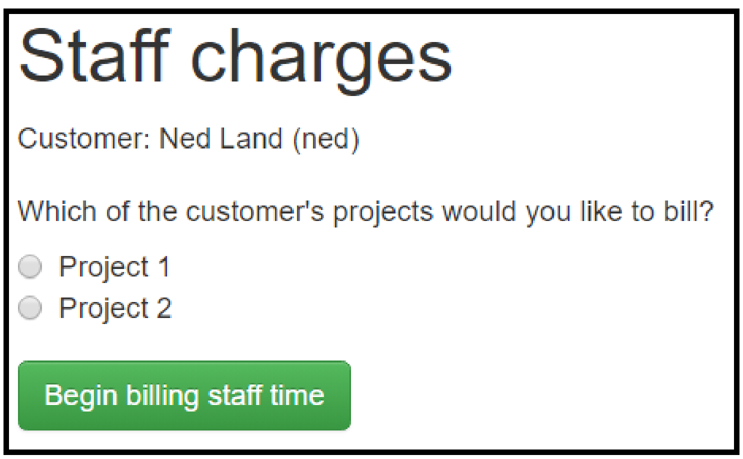


Figure 32.5: *Staff charge user with multiple projects*

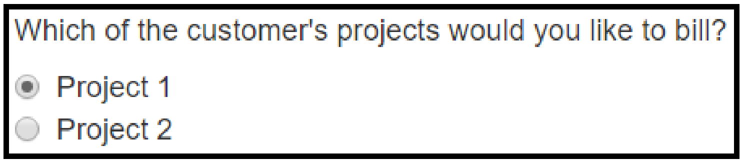


Figure 32.6: *Staff charge user project selection*

- Click the begin billing button to start charging staff time (Figure 32.7). The user, project, and start time will be recorded in the staff charges table of the database which is discussed in the Detailed administration → Staff charges section 43.53.

Figure 32.7: *Staff charge begin billing button*

- The navigation bar will display the charging staff time indicator in red (Figure 32.8).

Figure 32.8: *Staff charge navigation bar indicator*

- Hovering over the charging staff time indicator will provide user and project details (Figure 32.9).

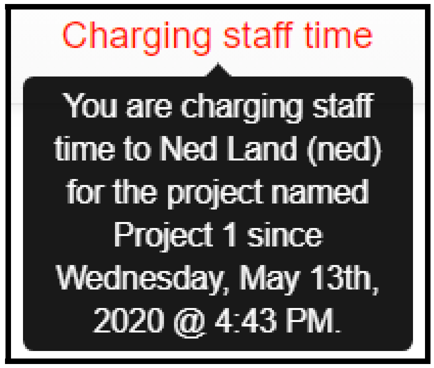


Figure 32.9: *Staff charge navigation bar indicator details*

- The staff member is now working on a project on behalf of a user. The staff charges page will provide dialog to stop working on the project and, if areas have been defined, provide a dialog to also begin charges for area access. In addition, if the staff member is logged into a tool on behalf of a user, it will be listed as well (Figure 32.10).

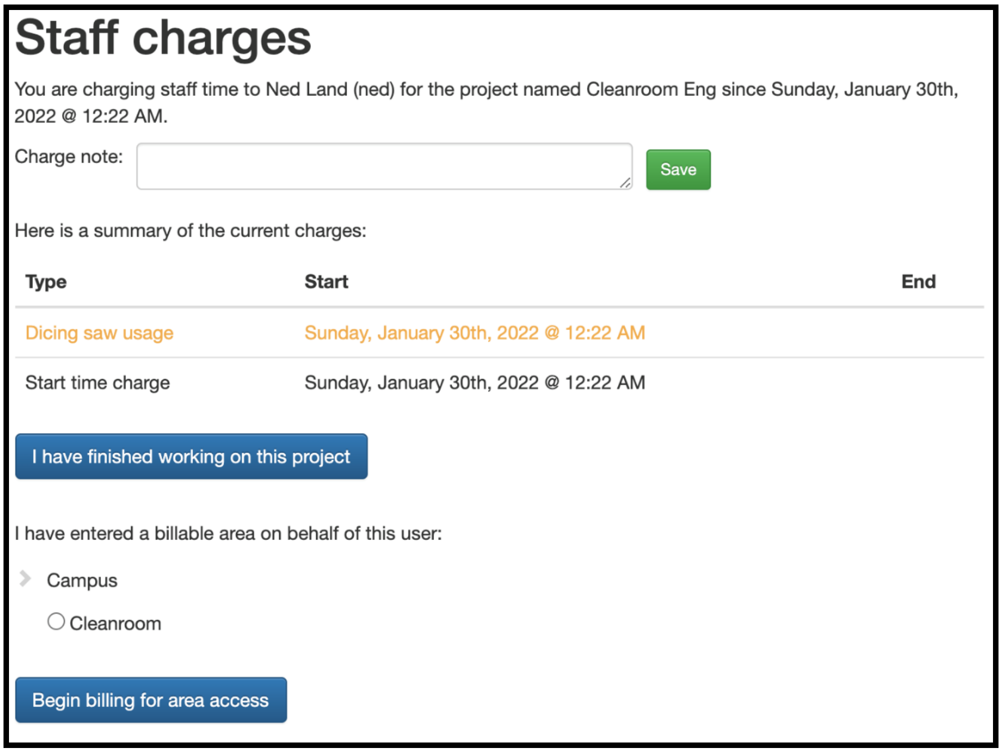


Figure 32.10: *Staff charge page, staff working on project, not billing area access*

- To add a charge note, simply click on the text area and enter the note (Figure 32.11), then click on the save button (Figure 32.12).

Figure 32.11: *Staff charge note text area*

Figure 32.12: *Staff charge text area save button*

- To stop working on a project, click the finished working button (Figure 32.13). This will write the end time to the staff charges table of the database, turn off the charging staff time indicator, and return to the initial customer search dialog.

Figure 32.13: *Staff charge finished working button*

- To begin billing for area access, click the area to work in (Figure 32.14) then click the area access button (Figure 32.15). The area, user, project, and start time will be recorded in the area access records table of the database which is discussed in the Detailed administration → Area access records section 43.7.

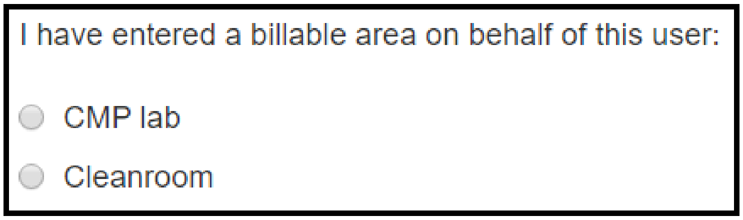


Figure 32.14: *Staff charge area selection*

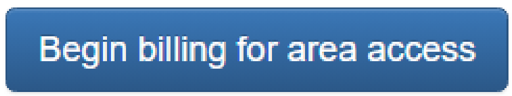


Figure 32.15: *Staff charge area access button*

- The staff member is now working on a project on behalf of a user and charging area access time. The staff charges page will provide a dialog to stop working in the area (Figure 32.16).

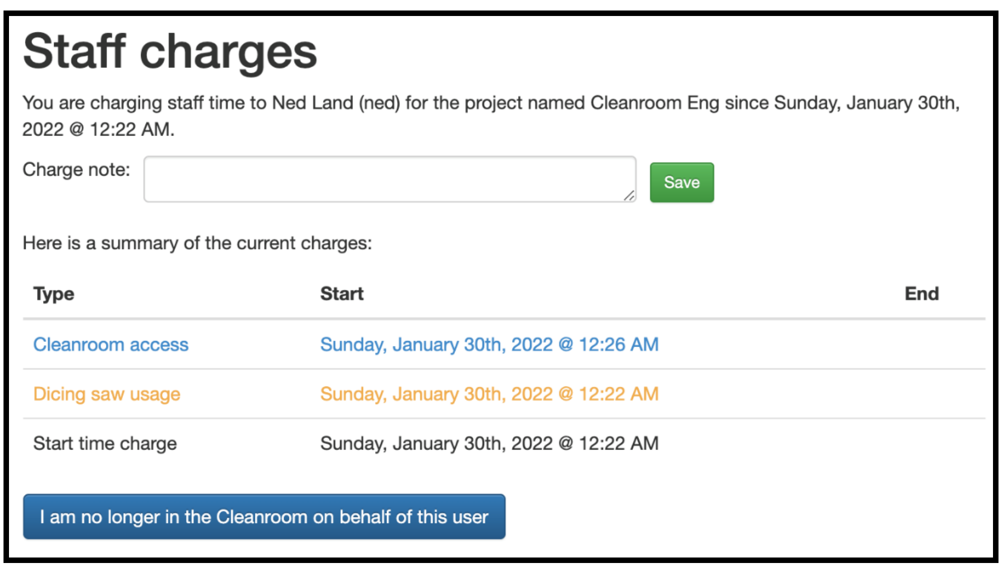


Figure 32.16: *Staff charge page, staff working on project and billing area access*

- To stop charging area access, click the no longer in area button (Figure 32.17). This will write the end time to the area access records table of the database and return to the staff member is now working on a project on behalf of a user dialog.

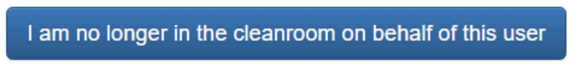


Figure 32.17: *Staff charge no longer in area button*

- The dialog will return to the staff charge dialog however will include the area access billed (Figure 32.18). At this time another area can be entered, or staff charges can be ended.

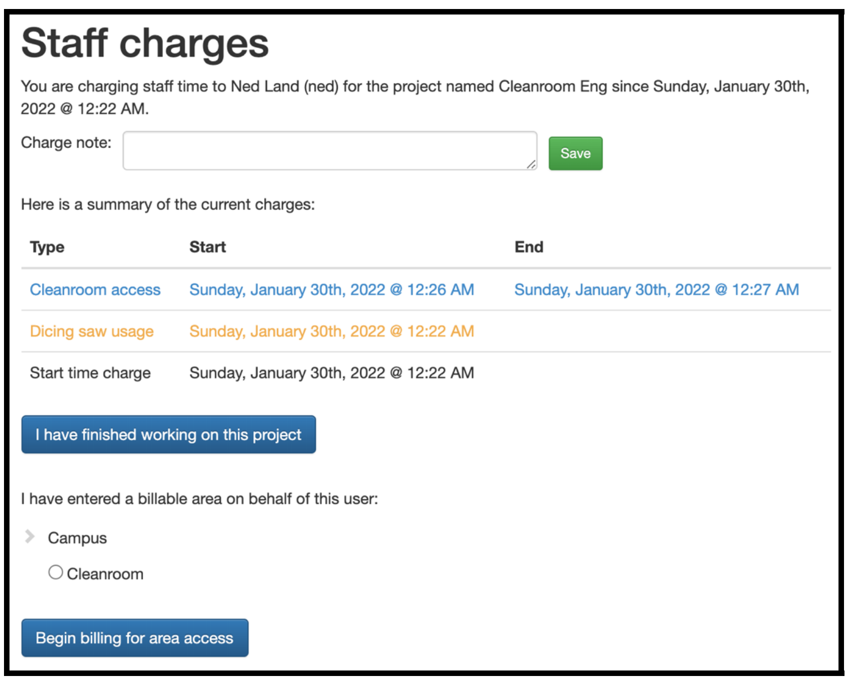


Figure 32.18: *Staff charge with area usage summary*

32.1.2 Web address

The staff charge page is accessible at site-address/staff_charges/. The page is accessible from the navigation bar by clicking Administration then clicking Staff charges.

32.1.3 Mobile device staff charges page

There are no mobile device views for the staff charges page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

32.1.4 Staff charges page customizations

Email reminders that staff charges are underway can be sent periodically and require an email template that is used to format messages. The email template is configured in the Customization $\rightarrow$ Staff charge reminder email page detailed in subsection 41.5.24. In addition, a timed service app must be properly configured and running which is described in NEMO timed services section 54.3.

32.2 Previous work

The previous work page allows staff to review and validate any work performed by staff on behalf of a user (Figure 32.19). Work can be reviewed for any staff member or all staff members and the month/year is selectable. Staff can validate work performed to confirm charges before billing.

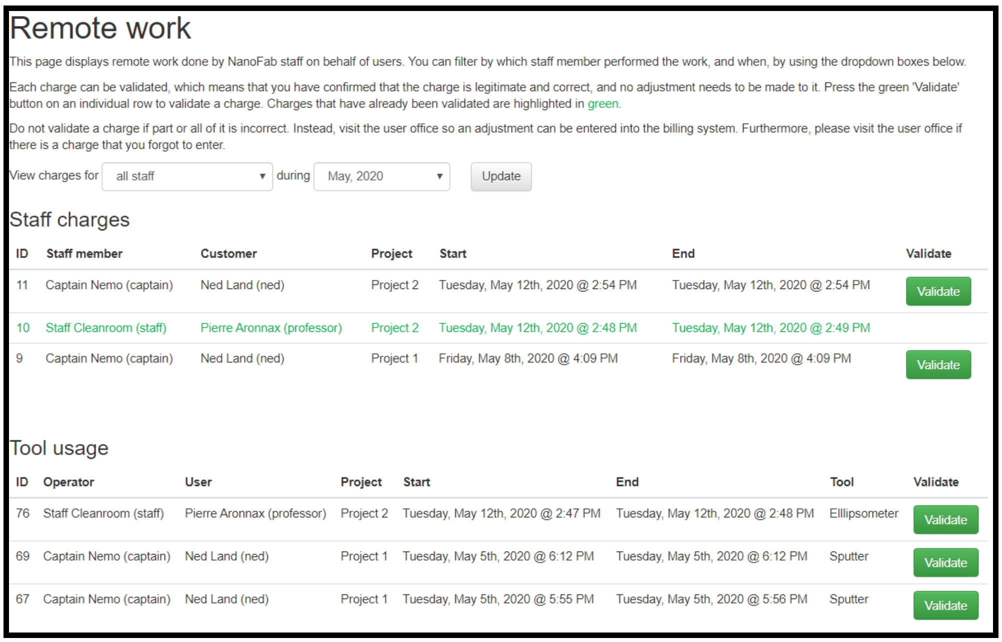


Figure 32.19: *Remote work page*

32.2.1 Usage

32.2.1.1 Staff and date

By default, records for the current staff member and the current month are displayed (Figure 32.20).

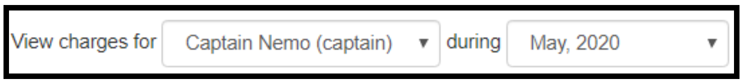


Figure 32.20: *Remote work staff and date dialog*

To change the user, click the dropdown and select from the list (Figure 32.21). An option for all staff is listed first and will display remote work by any staff member for the selected time period. This can be useful for user office staff to confirm remote work validation before creating bills.

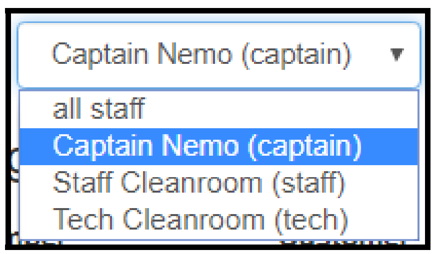


Figure 32.21: *Remote work staff dropdown*

To change the month, click the dropdown and select from the list (Figure 32.22).

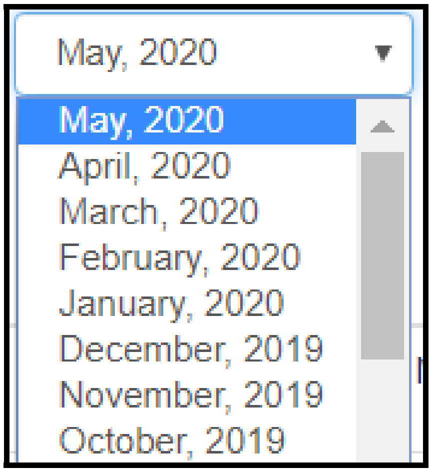


Figure 32.22: *Remote work date dropdown*

After changing the user and/or month, click the update button to refresh the records displayed (Figure 32.23).

Figure 32.23: *Remote work update button*

32.2.1.2 Staff charges

Staff charges display the staff member, user, project, start date/time, and end date/time (Figure 32.24). If the staff member entered a billable area that access will be displayed as well. If the user is an administrator or has access to change staff charges, change usage events or change area access records, the id of the charge (staff time, tool usage, or area access record, respectively) will be a link to the relevant part of the detailed administration.

18	Captain Nemo (captain)	Ned Land (ned)	Project 1	Wednesday, May 13th, 2020 @ 5:09 PM	Wednesday, May 13th, 2020 @ 5:29 PM	Validate
	Cleanroom access			Wednesday, May 13th, 2020 @ 5:23 PM	Wednesday, May 13th, 2020 @ 5:29 PM	
	CMP lab access			Wednesday, May 13th, 2020 @ 5:14 PM	Wednesday, May 13th, 2020 @ 5:22 PM	

Figure 32.24: *Remote work staff charges*

At the end of each record is a validate button that staff can use to confirm the work performed (Figure 32.25).

Figure 32.25: *Remote work staff charge validate button*

Validated records are displayed in green and do not show the validate button (Figure 32.26).

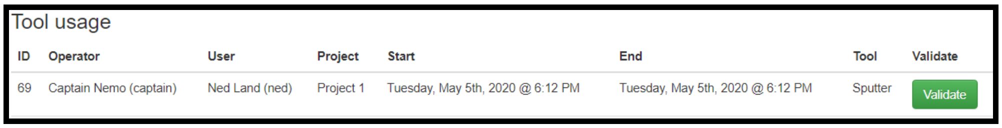
Staff charges

ID	Staff member	Customer	Project	Start	End	Validate
11	Captain Nemo (captain)	Ned Land (ned)	Project 2	Tuesday, May 12th, 2020 @ 2:54 PM	Tuesday, May 12th, 2020 @ 2:54 PM	

Figure 32.26: *Remote work staff charge validated*

32.2.1.3 Tool usage

Tool usage displays the staff member, user, project, start date/time, and end date/time (Figure 32.27).



Tool usage

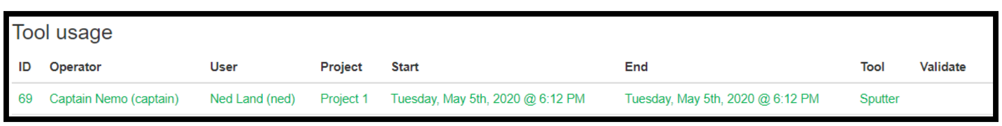
ID	Operator	User	Project	Start	End	Tool	Validate
69	Captain Nemo (captain)	Ned Land (ned)	Project 1	Tuesday, May 5th, 2020 @ 6:12 PM	Tuesday, May 5th, 2020 @ 6:12 PM	Sputter	Validate

Figure 32.27: *Remote work tool usage*

At the end of each record is a validate button that staff can use to confirm the work performed (Figure 32.28).

Figure 32.28: *Remote work tool usage validate button*

Validated records are displayed in green and do not show the validate button (Figure 32.29).



Tool usage

ID	Operator	User	Project	Start	End	Tool	Validate
69	Captain Nemo (captain)	Ned Land (ned)	Project 1	Tuesday, May 5th, 2020 @ 6:12 PM	Tuesday, May 5th, 2020 @ 6:12 PM	Sputter	

Figure 32.29: *Remote work tool usage validated*

32.2.2 Web address

The remote work page is accessible at site-address/remote_work/. The page is accessible from the navigation bar by clicking Administration then clicking Remote work.

32.2.3 Mobile device remote work page

There are no mobile device views for the remote work page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

32.2.4 Remote work page customizations

A few options are available for remote work in Customization $\rightarrow$ Remote work, see section 41.11.

CHAPTER 33

Resources (staff only)

The resources page lists all resources, grouped by category. Resources in green are currently available while resources in red are unavailable (Figure 33.1).

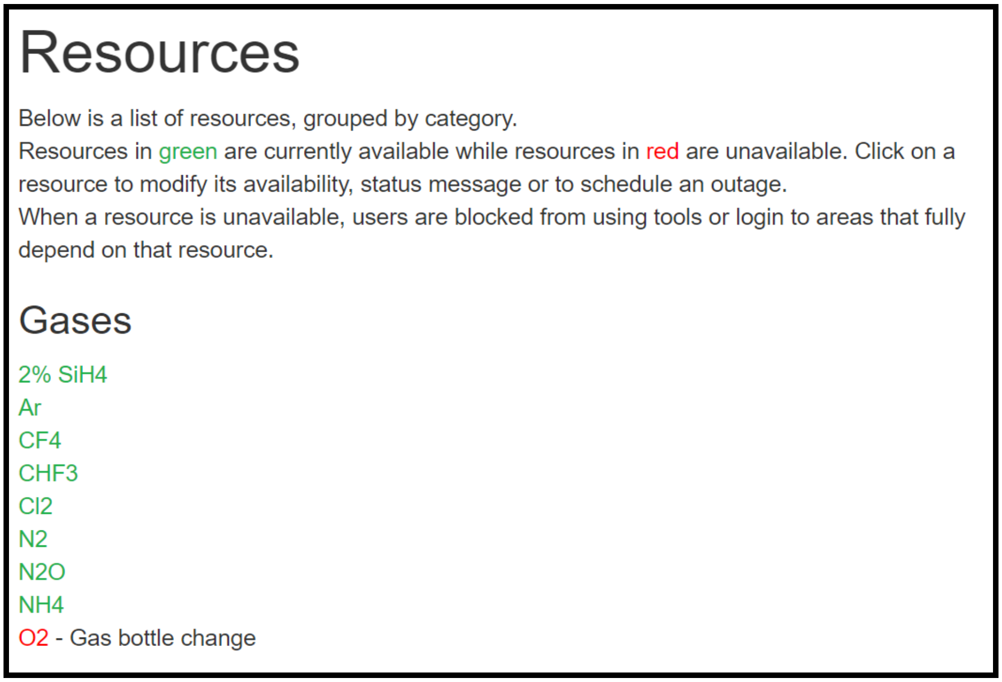


Figure 33.1: *Resources page*

33.1 Resource discussion

Resources provide a method to define tool dependencies such as gases, facility spaces, and utilities that can be associated with tools are either required or non-required resources. When a resource is unavailable, users are blocked from using tools or areas that require the resource and notified on tools that with a non-required association.

Example 1, if ‘oxygen’ is defined as a resource and shutdown, all tools that have ‘oxygen’ as a required dependency will also be shutdown. All tools that have ‘oxygen’ as a non-required dependency will be noted. This can be useful for gas bottle changes.

Example 2, if ‘cleanroom’ is defined as a resource and all tools require ‘cleanroom’ then shutting down the ‘cleanroom’ resource will shut down every tool. This can be useful for weather closures or lab wide closures.

Example 3, if ‘cleanroom’ is defined as a resource and the area ‘lab’ requires the ‘cleanroom’ resource, then shutting down the ‘cleanroom’ resource will prevent users logging in to the area ‘lab’. If the area also has physical access defined, the doors for the area will not open for non-staff.

Resources can optionally be grouped by category to visually organize common resources. Resource categories are defined in the Detailed administration → Resource categories section 43.40.

Resources are defined in the Detailed administration → Resources section 43.41. Areas are associated with resources here.

Tools may optionally have required resources and/or non-required resources assigned. Tools are defined in the Detailed administration → Tools section 43.64.

33.2 Resource Detail

To access the details of a resource, click the resource name (Figure 33.2).

Figure 33.2: *Resources example of resource name*

The resource details page will open and list tools and areas that fully or partially depend on the resource (Figure 33.3). In addition, there are buttons to modify resource availability and to schedule resource outages.

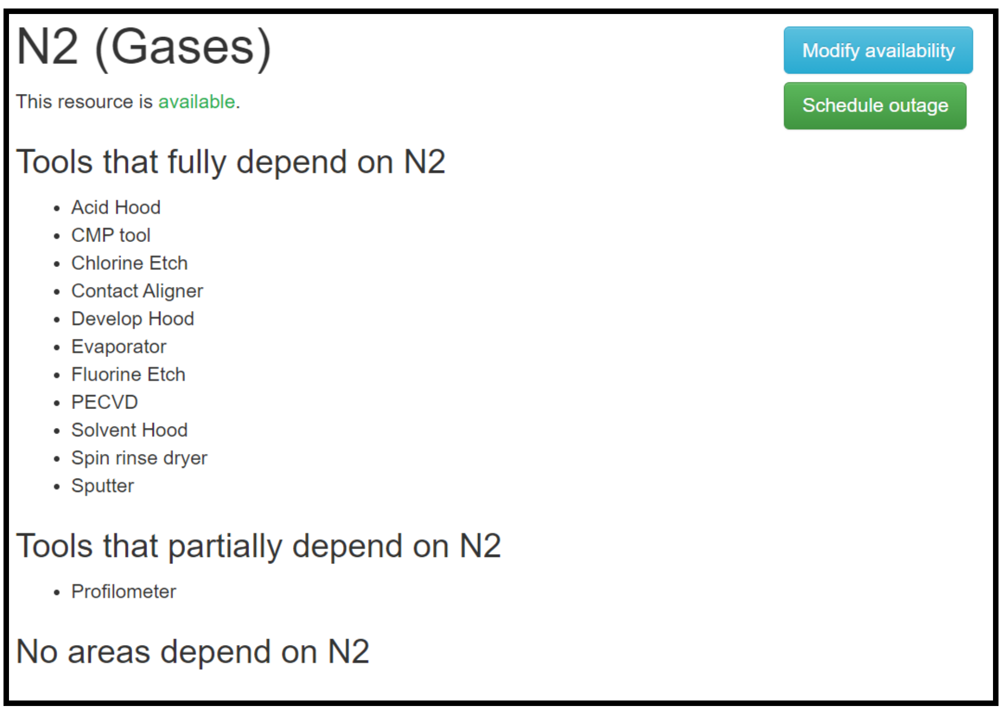


Figure 33.3: *Resources detail page*

Information provided includes all fully dependent tools, all partially dependent tools, and all dependent areas. Any tools currently in use indicates the user information. If no dependency exists, it will be noted.

- Tools that fully depend on a resource (Figure 33.4).

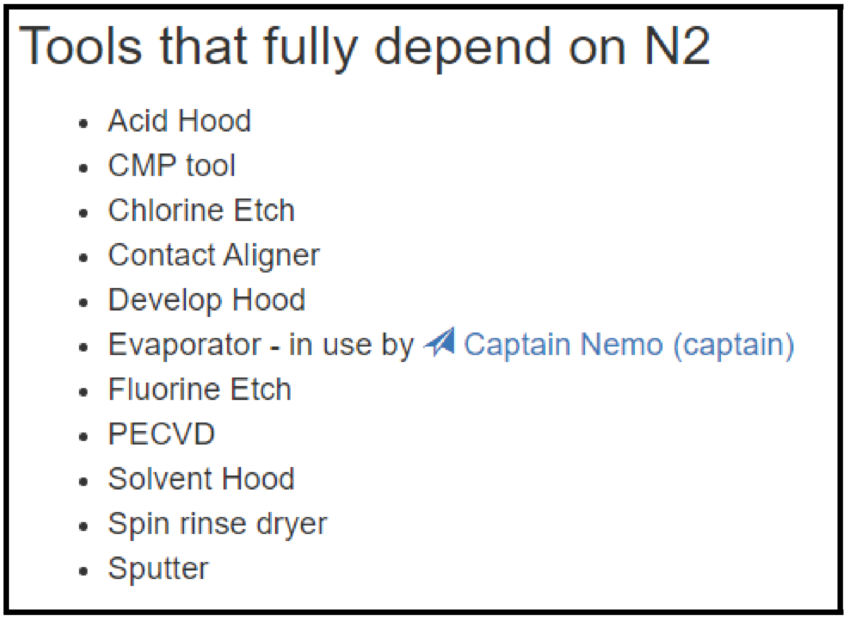


Figure 33.4: *Resource fully dependent tool list*

- Tools that partially depend on a resource (Figure 33.5).

Figure 33.5: *Resource partially dependent tool list*

- Areas that depend on a resource (Figure 33.6).

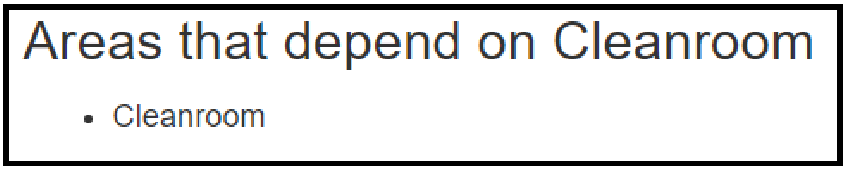


Figure 33.6: *Resource dependent area list*

33.2.1 Modify a resource

Resource status and status messages can be managed through the modify resource dialogs. A resource can be shut down and details provided to users, and a resource can be brought back to available. Information about impacted tools and areas is also provided.

33.2.1.1 Shut down an available resource

From the resource page, click the resource name (Figure 33.7).

Figure 33.7: *Resources item name*

- Click the modify availability button (Figure 33.8).

Figure 33.8: *Resources modify availability button*

- The modify a resource dialog will open (Figure 33.9).

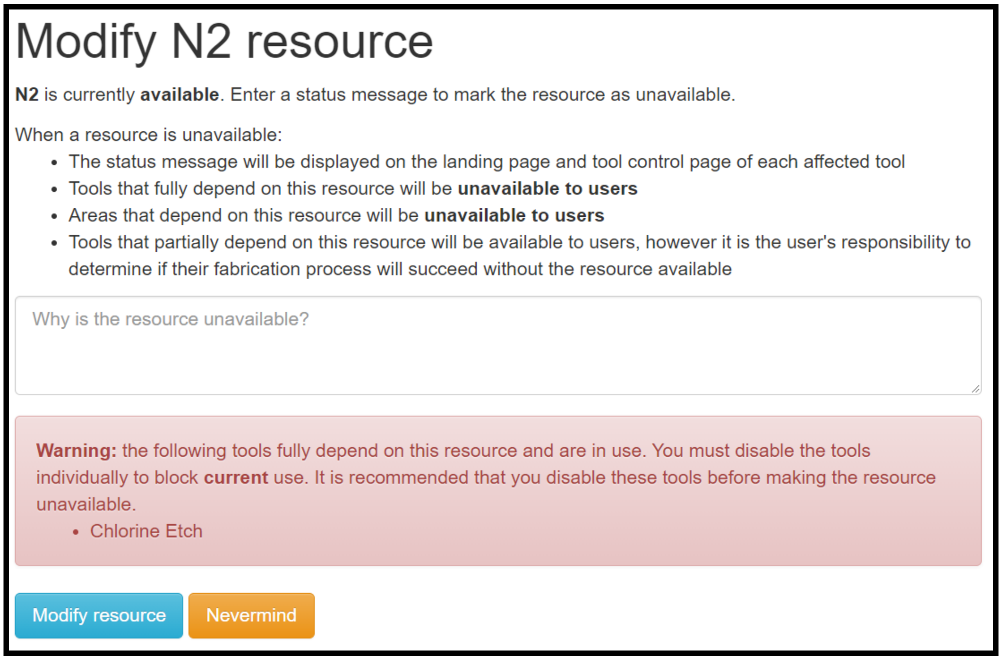


Figure 33.9: *Resources modify resource dialog shutdown*

- Provide a reason the resource will be unavailable (Figure 33.10).

Figure 33.10: *Resources shutdown reason*

- If any tools that require the resource are currently in use, a warning will be displayed (Figure 33.11).

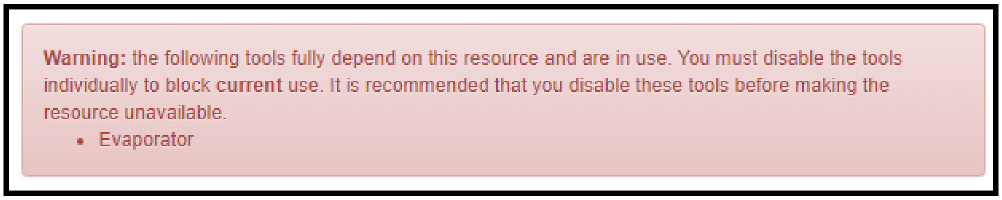


Figure 33.11: *Resources shutdown tool in use warning*

- Click the modify button to shut down the resource or, click the never mind button to return to the resource page (Figure 33.12).

Figure 33.12: *Resource shutdown buttons*

- Return to the resources page, if the resource was shutdown, it will now be red with the outage reason listed (Figure 33.13).

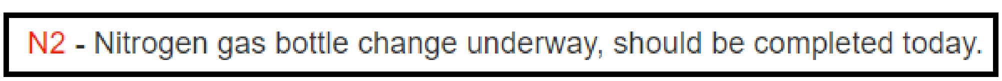


Figure 33.13: *Resource shutdown listing*

- The outage will be listed in the alerts and outages section of the landing page (Figure 33.14).

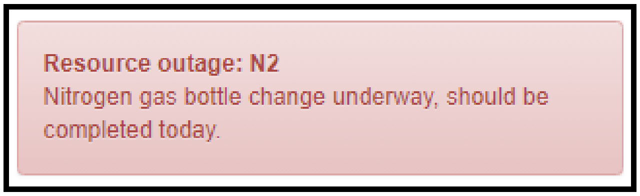


Figure 33.14: *Resource shutdown landing page message*

- The outage will be listed in the tool control summary tab of each impacted tool.
  - Required resource outage will cause the tool to be shut down (Figure 33.15).

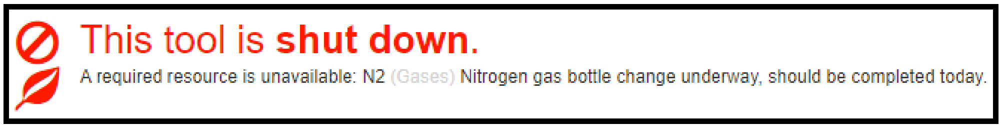


Figure 33.15: *Resource shutdown tool shutdown message*

- Non-required resource outage will list a warning (Figure 33.16).

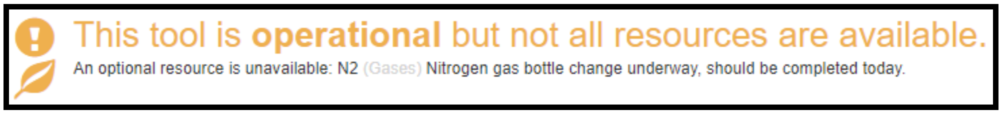


Figure 33.16: *Resource outage tool problem message*

33.2.1.2 Enable a previously shutdown resource

- Click the red resource name (Figure 33.17). Note: only the red text is a link.

Figure 33.17: *Resource example of red shutdown resource listing*

- Click the modify availability button (Figure 33.18).

Figure 33.18: *Resources modify availability button*

- The modify a resource dialog will open (Figure 33.19).

Figure 33.19: *Resources modify resource dialog enable*

- Select make available or change message radio button (Figure 33.20). The make resource available button is checked by default.

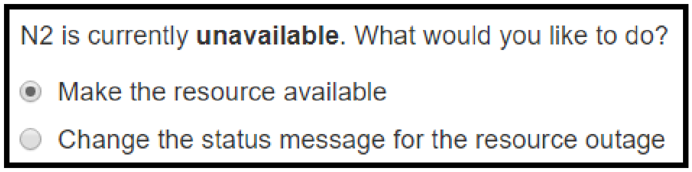


Figure 33.20: *Resources enable selection*

- If change message selected, update dialog box (Figure 33.21).

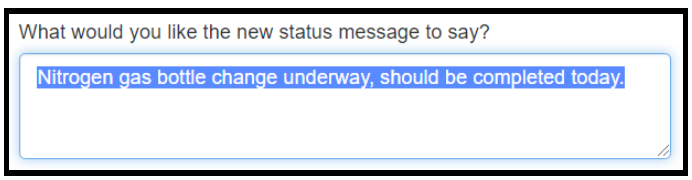


Figure 33.21: *Resources update status message dialog box*

- Click modify button to finish or click never mind to return to the resource page (Figure 33.22).

Figure 33.22: *Resource enable buttons*

- Return to the resources page, if the resource was enabled, it will now be green (Figure 33.23).

Figure 33.23: *Resource enabled listing*

- All alerts and tool restrictions are removed.

33.2.2 Scheduled resource outages

Resource outages can be scheduled when the start and end time is known. Examples include gas bottle changes or facility maintenance that will happen in a predictable manner. Outages automatically start and end. Once the end time is past, the outage will be hidden. A history of scheduled outages is maintained in the scheduled outages table of the database as discussed.

33.2.2.1 Create a scheduled resource outage

- From the resource page, select the resource of interest (Figure 33.24).

Figure 33.24: *Resource item name link*

- Click the Schedule outage button on the resource detail page (Figure 33.25).

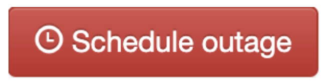


Figure 33.25: *Resource scheduled outage button*

- The scheduled resource outage dialog page will open (Figure 33.26).

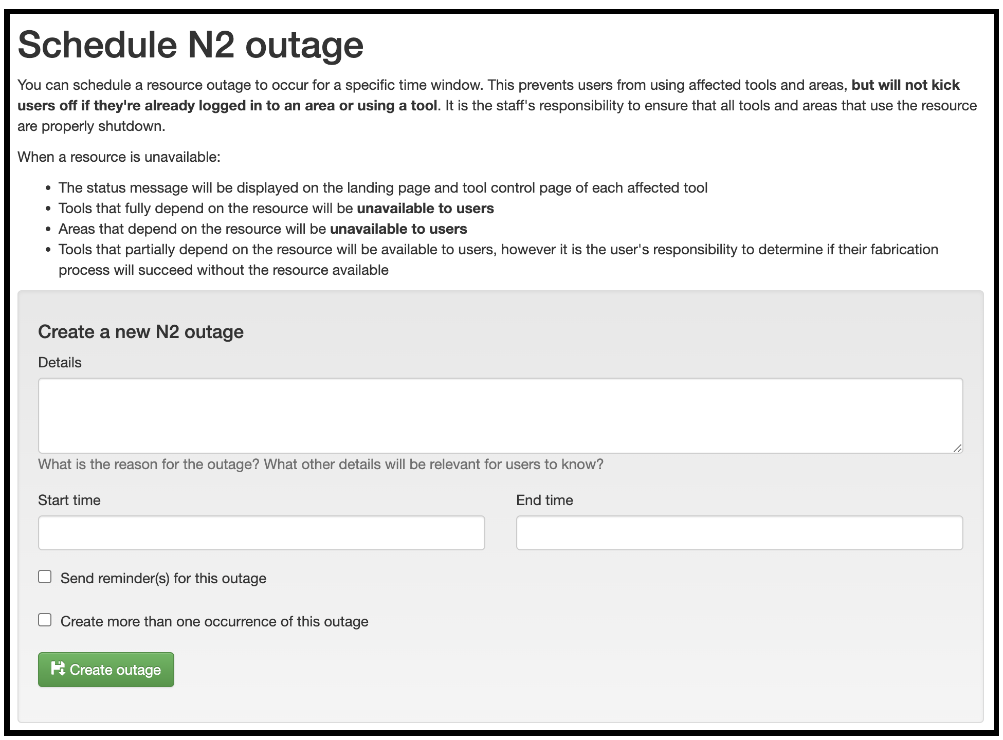


Figure 33.26: *Resource scheduled outage page*

- Select the optional outage category if scheduled outage categories have been defined (Figure 33.27). If scheduled outage categories have not been defined, this dialog will not appear. Scheduled outage categories are defined in the Detailed administration → Scheduled outage categories section 43.46.

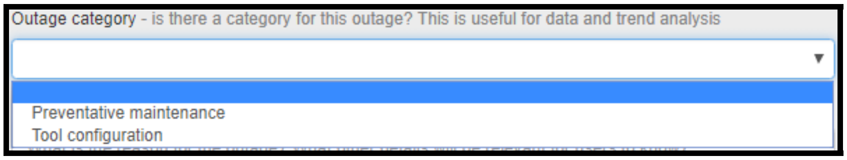


Figure 33.27: *Resource scheduled outage category dropdown*

- Provide details about the outage (Figure 33.28).

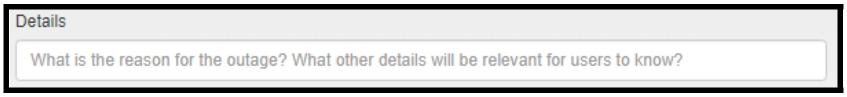


Figure 33.28: *Resource scheduled outage details*

- Select a start time and end time (Figure 33.29). Clicking in the start time or end time dialog will open the clock/calendar dialog (Figure 33.30). The date and time will update automatically as the clock/calendar is clicked.

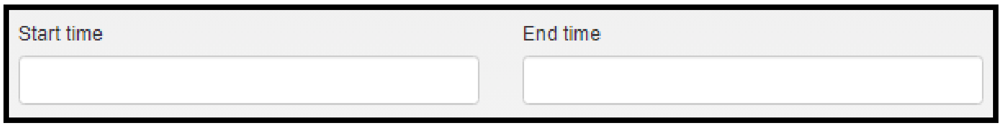


Figure 33.29: *Resource start and end dialog*

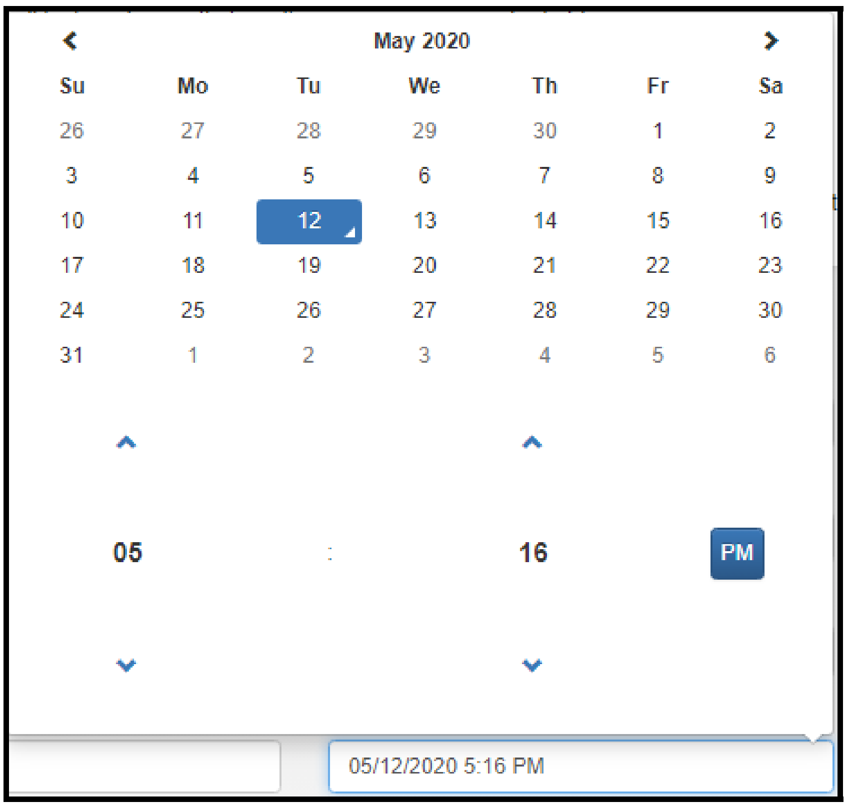


Figure 33.30: *Resource clock/calendar dialog*

- Click on the “Send reminder(s) for this outage” box to display the reminder portion of the form. This allows to set multiple email reminders for before this outage starts (Figure 33.31).

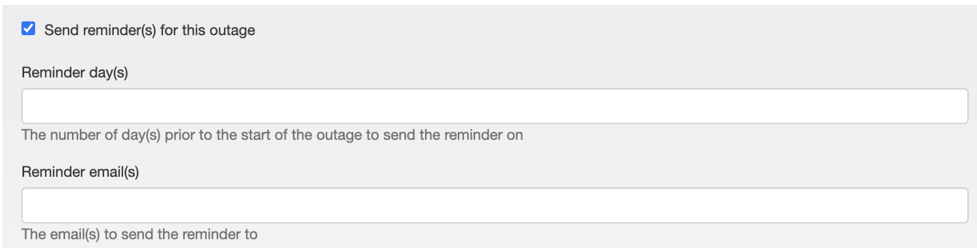


Figure 33.31: *Resource scheduled outage reminders*

- Click on the “Create more than one occurrence of this outage” box to display the outage recurrence portion of the form. This allows to create multiple outages at the same time (Figure 33.32).

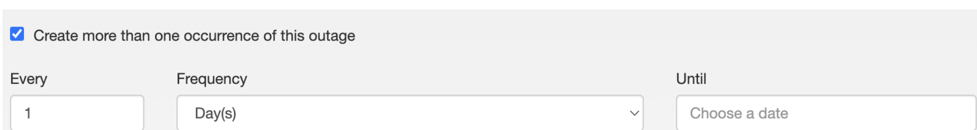


Figure 33.32: *Resource scheduled outage recurring*

- Click the create outage button (Figure 33.33).

Figure 33.33: *Resource scheduled outage button*

- Scheduled outages are saved in the scheduled outage table of the database which is described in the Detailed administration → Scheduled outages section 43.46. The details of the scheduled outage will be displayed at the top of the resource detail page (Figure 33.34).

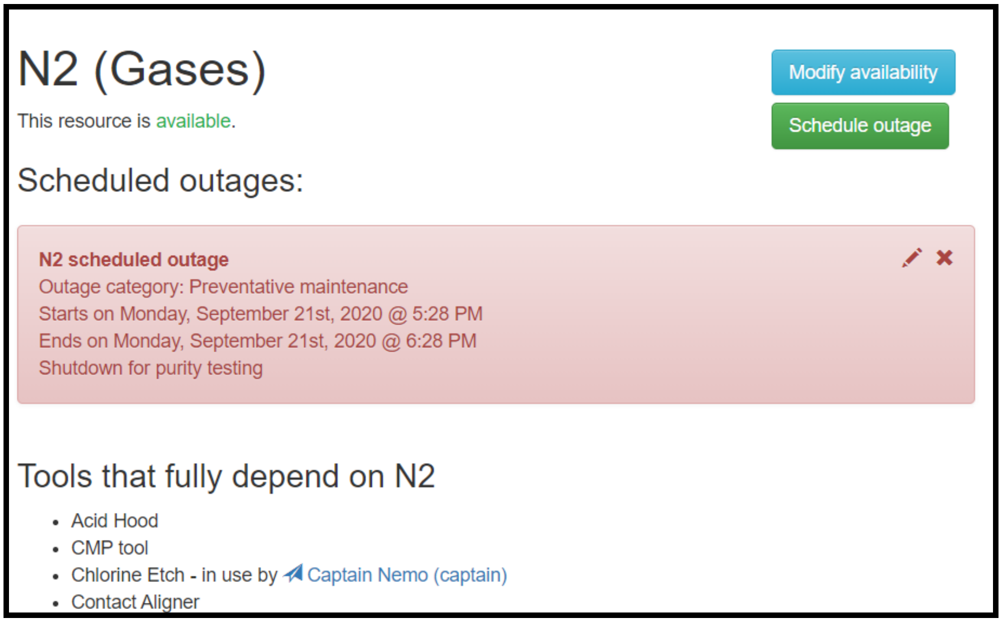


Figure 33.34: *Resource detail page scheduled outage details*

33.2.2.2 Delete a scheduled resource outage

A scheduled resource outage can be deleted by clicking the icon in the outage of interest at the top of the resource detail page (Figure 33.35). The deletion is immediate without confirmation. The outage is still saved in the database but marked as deleted and will no longer be displayed.

Figure 33.35: *Resource existing scheduled outage dialog*

33.2.2.3 Edit a scheduled resource outage

To edit a scheduled outage:

- Click the icon in the alert dialog of interest at the top of the resource detail page.
- The scheduled outage page will populate the details of the selected outage (Figure 33.36).

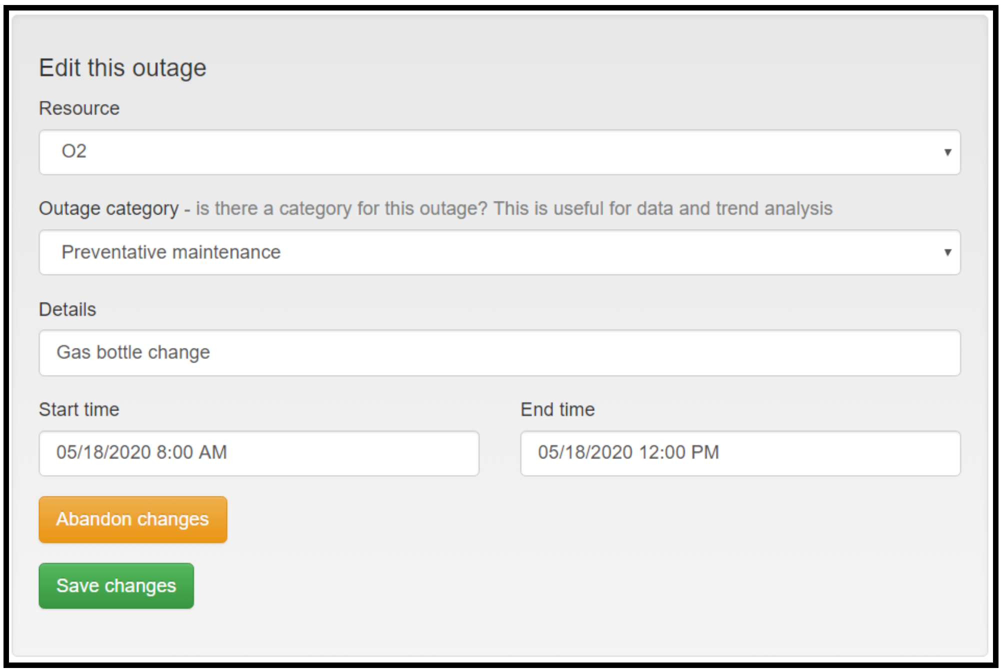


Figure 33.36: *Resource edit existing scheduled outage*

- Edit any fields that need updating. The process is identical to creating a scheduled outage above.
- To cancel click the abandon changes button (Figure 33.37).

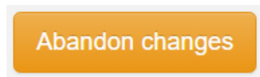


Figure 33.37: *Resource scheduled outage edit abandon changes button*

- To save the update click the save changes button (Figure 33.38).

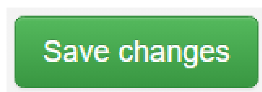


Figure 33.38: *Resource scheduled outage edit save changes button*

33.3 Web address

The resources page is accessible at site-address/resources/. The page is accessible from the navigation bar by clicking Administration then clicking Resources.

33.4 Mobile device resources page

There are no mobile device views for the resources page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

33.5 Resources page customizations

There are no customizations for the resources page.

CHAPTER 34

Project billing (user office and accounting only)

The project billing page provides staff with an interface to search for usage by account, application, or project (Figure 34.1). If the billing service is not set or unavailable, this page will redirect to the project usage page.

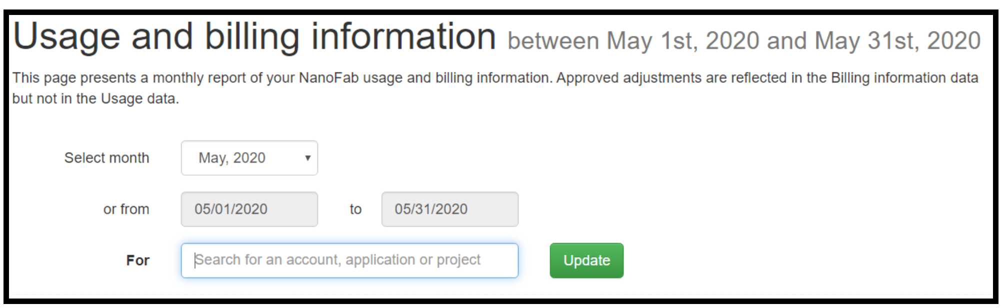


Figure 34.1: *Project billing page*

34.1 Usage

The project billing page offers an additional search dialog to display all records for an account, application, or project (Figure 34.2).

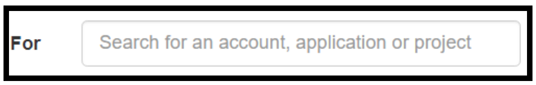


Figure 34.2: *Project billing search dialog*

A list of items is returned as characters are typed (Figure 34.3). The item of interest can be selected from the return list at any time by clicking the name.

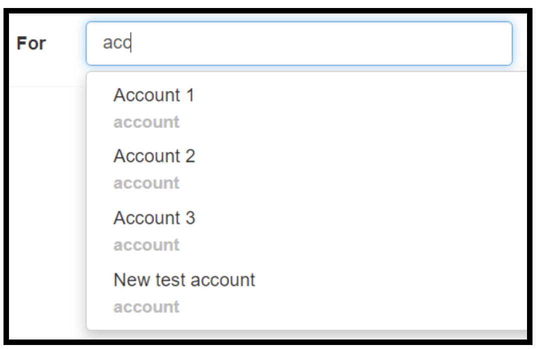


Figure 34.3: *Project billing search dialog return list*

The rest of the project billing page usage and return information is identical to the view usage page detailed.

34.2 Web address

The project billing page is accessible at site-address/project_billing/. The page is accessible from the navigation bar by clicking Administration then clicking Project billing.

34.3 Mobile device project billing page

There are no mobile device views for the project billing page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

34.4 Project billing page customizations

There are no customizations for the project billing page.

CHAPTER 35

Supplies (staff and user office, or all users)

The supplies page provides staff (and users if self checkout is enabled) with an interface to record distribution of consumable items and supplies to users (Figure 35.1). Supplies are setup in the consumables table of the database detailed in the Detailed administration → Consumables section 43.19. The consumables table facilitates tracking of quantities in stock and can trigger a notification if the stock is low.

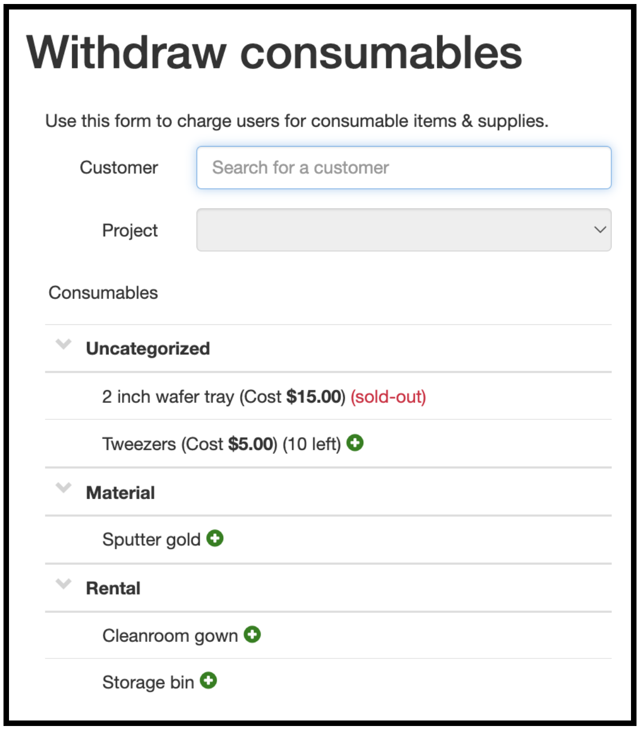


Figure 35.1: *Supply page*

35.1 Usage

To withdraw a consumable item or supply:

- Enter a user name in the customer dialog (Figure 35.2). This option defaults to the logged in user if this is a self-checkout action.

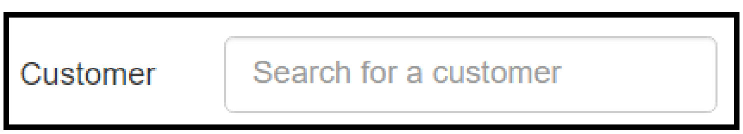


Figure 35.2: *Supply customer dialog*

- A list of users is returned as characters are typed (Figure 35.3). The user can be selected from the return list at any time by clicking the name.

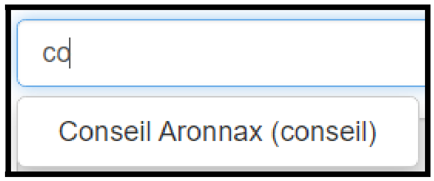


Figure 35.3: *Supply customer dialog return list*

- If the wrong name is selected, clicking the selected users name will reset the form.
- If the selected user does not have an active project, an error is displayed and the withdraw will not be allowed (Figure 35.4).

Figure 35.4: *Supply no active project*

- If the selected user has one project, it is automatically selected (Figure 35.5).

Figure 35.5: *Supply single project*

- If the selected user has multiple projects, click the dropdown and choose a project to bill (Figure 35.6).

Figure 35.6: *Supply multiple projects*

- Click on the consumable item or the + icon in the list to bring up the quantity popup (Figure 35.7).

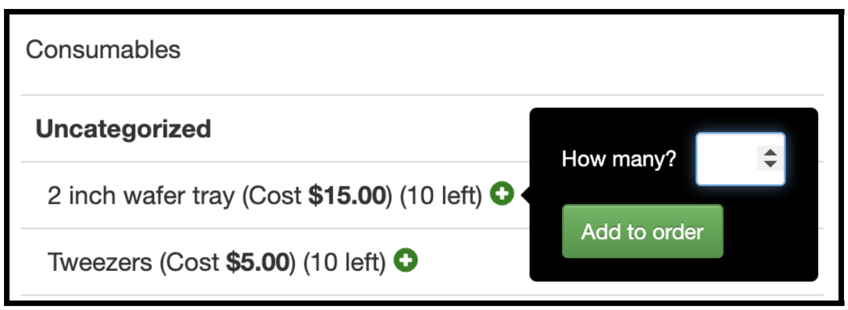


Figure 35.7: *Supply select consumable*

  - The consumable item list can be organized by categories which are described in the Detailed administration → Consumable categories section 43.17.
  - The cost of each consumable can be optionally listed by uploading rate information as discussed in the Customizations → Tool rates section 41.9.

- Enter an integer quantity in the quantity dialog (Figure 35.8).

Figure 35.8: *Supply quantity*

- Click the “Add to order” button or simply press <Enter> (Figure 35.9).

Figure 35.9: *Supply add to order*

- The item is added to the “current order” on the right side of the screen (Figure 35.10).

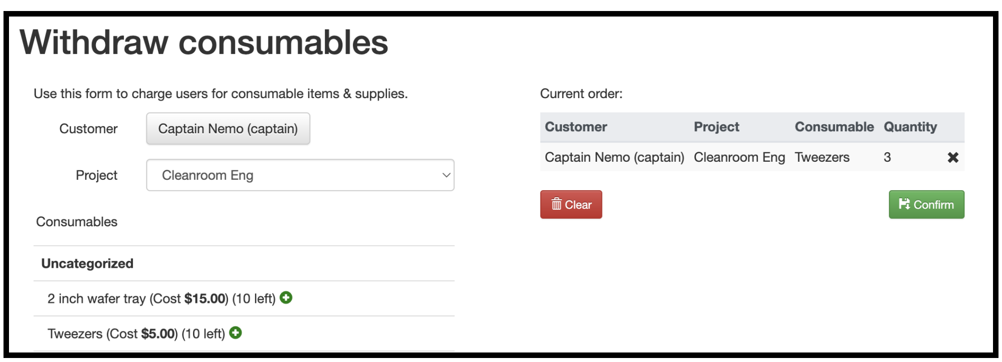


Figure 35.10: *Supply current order*

- You can keep adding more items to the current order, for the same or for a different customer (Figure 35.11).

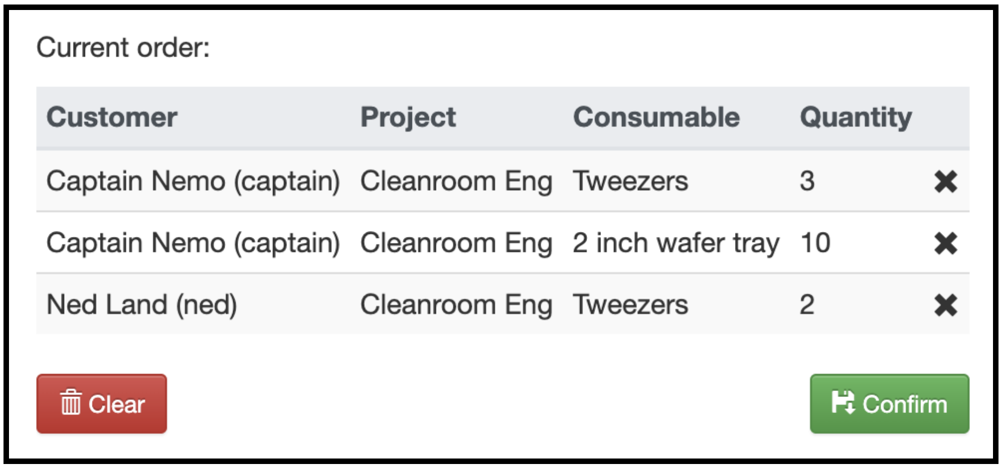


Figure 35.11: *Supply multiple items order*

- You can click the clear button (Figure 35.12) to clear the current order.

Figure 35.12: *Supply clear button*

- Click the confirm button (Figure 35.13).

Figure 35.13: *Supply confirm button*

- If the withdraw was successful.

- The transaction is recorded in the consumable withdraws table of the database described in the Detailed administration → Consumable withdraws section 43.18.
- The total quantity in stock is updated in the consumables table of the database unless the item's reusable property is set to True.
- A success message is displayed at the top of the page (Figure 35.14).

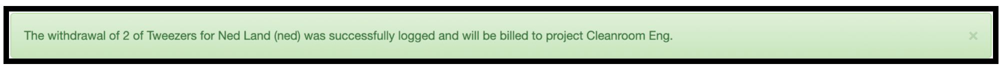


Figure 35.14: *Supply success message*

- If the withdraw was not successful:
  - A failure reason is provided at the top of the page (Figure 35.15).

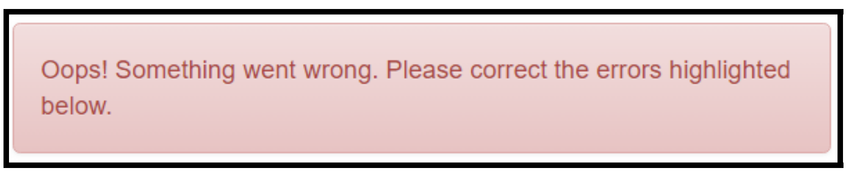


Figure 35.15: *Supply fail message*

  - Any missing information is highlighted next to the dialog box (Figure 35.16).

Figure 35.16: *Supply missing information*

  - If a non-integer is entered for the quantity, it is noted at the quantity dialog (Figure 35.17).

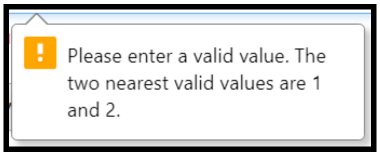


Figure 35.17: *Supply integer error*

- Correct any errors and try again.

35.2 Web address

The supplies page is accessible at site-address/consumables/. The page is accessible from the navigation bar by clicking Administration then clicking Supplies.

35.3 Mobile device supplies page

There are no mobile device views for the supplies page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

35.4 Supplies page customizations

- Users can be allowed to self checkout consumables if the option is enabled in the Customizations → Application section 41.2.
- Consumable categories can be collapsed by default if the option is checked in the Customizations → Application section 41.2.
- Supply rates can be displayed next to each supply in the consumable list and are discussed in the Customizations → Tool rates section 41.9.

CHAPTER 36

Tool credentials (staff only)

The tool credentials page provides staff with an interface to search for specific tool credentials. Administrators and staff with specific permissions can use the add and edit button to be taken to detailed administration and change them. Other staff members are only allowed to view and search them. (Figure 36.1).

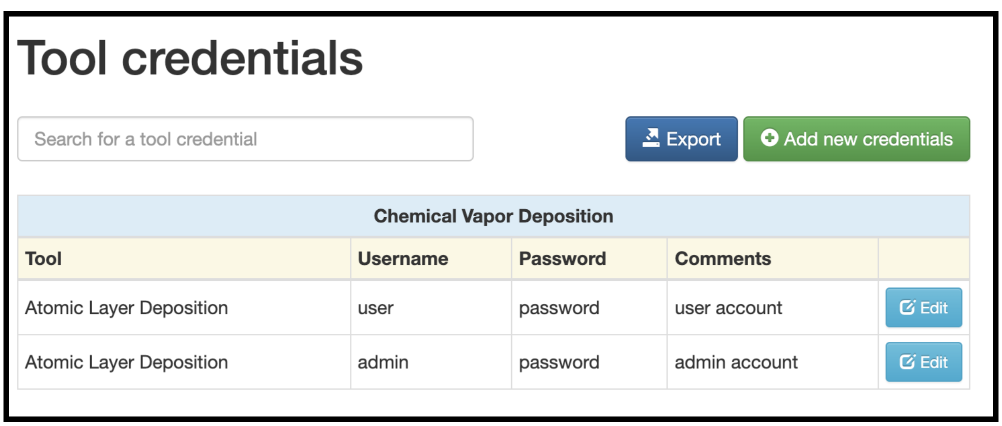


Figure 36.1: *Tool credentials page*

36.1 Web address

The tool credentials page is accessible at site-address/tool_credentials/. The page is accessible from the navigation bar by clicking Administration then clicking Tool credentials.

36.2 Mobile device tool credentials page

There are no mobile device views for the tool credentials page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

36.3 Tool credentials page customizations

By going to Customization $\rightarrow$ Tools (see subsection 41.14.4), you can decide whether or not to show tool credentials on the tool control details tab.

CHAPTER 37

Training (staff and tool superusers only)

The training page provides staff and tool superusers with an interface to record user training and qualify users (Figure 37.1).

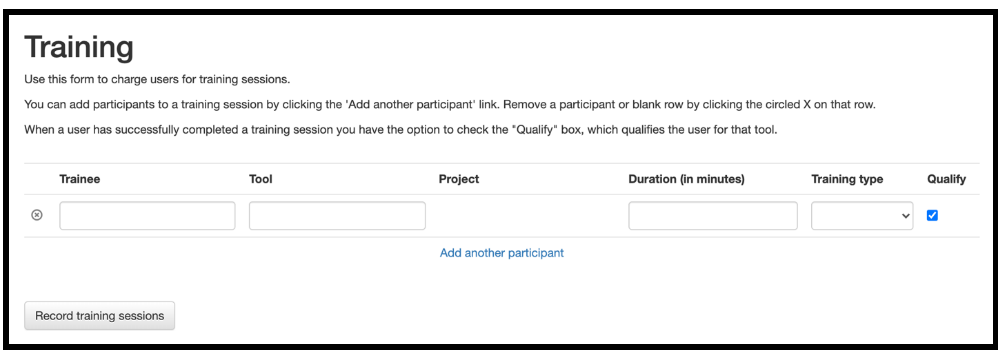


Figure 37.1: *Training page*

37.1 Usage

To record user training:

- Enter the user name in the trainee dialog box (Figure 37.2).

Figure 37.2: *Training trainee dialog*

- A list of users is returned as characters are typed (Figure 37.3). The user can be selected from the return list at any time by clicking the user name.

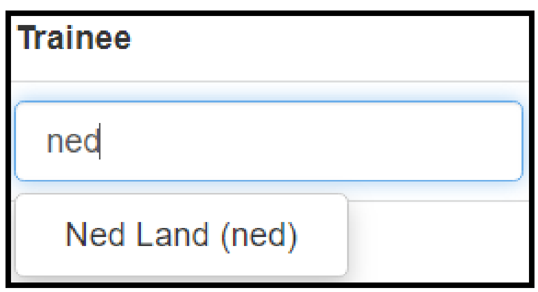


Figure 37.3: *Training trainee dialog return list*

- If the incorrect user is selected, click the users name in the trainee dialog box to clear the entry and retry.
- Enter the tool or tool group in the tool dialog box (Figure 37.4).

Figure 37.4: *Training tool dialog*

- A list of tools and tool groups is returned as characters are typed (Figure 37.5). The tool or tool group can be selected from the return list at any time by clicking the tool/group name. Staff can select any tool, superusers can only select the tools they are superusers for.

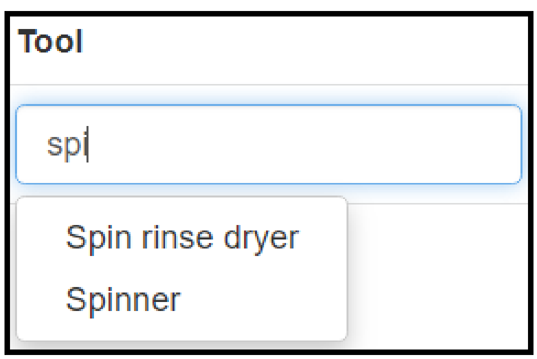


Figure 37.5: *Training tool dialog return list*

- If the incorrect tool or group is selected, click the tool/group name in the tool dialog box to clear the entry and retry.
- If the user has only one project, it will be selected automatically (Figure 37.6).

Figure 37.6: *Training single project*

- If the user has multiple projects, click the dropdown and choose a project to bill (Figure 37.7).

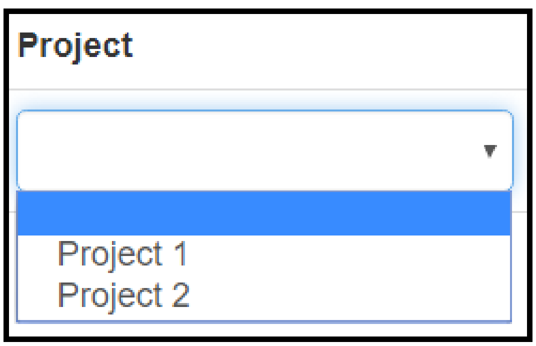


Figure 37.7: *Training multiple projects*

- Enter the training time in the duration dialog box in minutes (Figure 37.8).

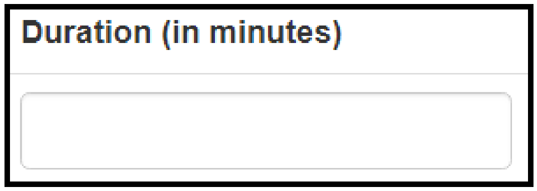


Figure 37.8: *Training duration*

- Select the training type from the dropdown (Figure 37.9).

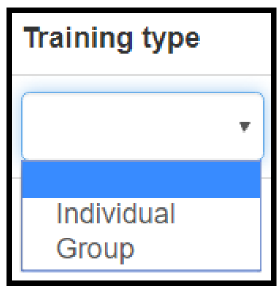


Figure 37.9: *Training type*

- If the user should not be qualified on the tool at this time, uncheck the qualify checkbox (Figure 37.10).

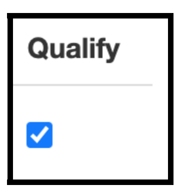


Figure 37.10: *Training qualify*

- More training sessions can be added by clicking the add participant link (Figure 37.11). Each training row is independent so multiple training sessions do not need to be related in any way.

Figure 37.11: *Training add participant*

- If a training session row needs to be removed, click the ⊗ next to the trainee name.
- Click the record button to complete the training (Figure 37.12).

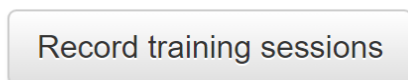


Figure 37.12: *Training record button*

- If the training was recorded successfully.
- A training record will be written in the training sessions table of the database described on the Detailed administration → Training sessions page in section 43.65.
- If the qualify box was checked, the membership histories table in the database is updated. The membership history table is described on the Detailed administration → Membership histories page in section 43.28. If the selected tool is configured to grant a physical access level to the user upon qualification, the users access level will be updated.
- A success dialog will be displayed (Figure 37.13). Click continue to return to the NEMO landing page.

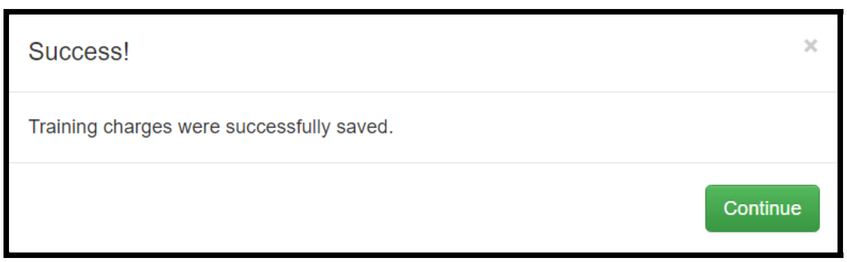


Figure 37.13: *Training success message*

- If the training was not recorded successfully, an error message is displayed (Figure 37.14). Correct any missing information and retry.

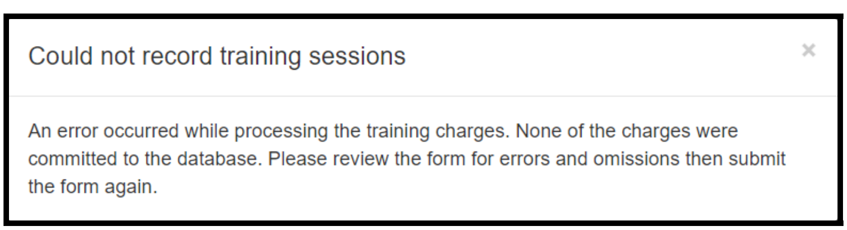


Figure 37.14: *Training error message*

37.2 Web address

The training page is accessible at site-address/training/. The page is accessible from the navigation bar by clicking Administration then clicking Training.

37.3 Mobile device training page

There are no mobile device views for the training page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

37.4 Training page customizations

By going to Customization $\rightarrow$ Training (see section 41.15), you can customize:

- The types of training offered (Group and/or Individual)
- Whether staff and superusers can specify the training date

CHAPTER 38

Transfer charges (accounting officers and facility managers)

The transfer charges page provides accounting officers and facility managers with an interface to move charges from one project to another (Figure 38.1). To be available, this feature needs to be enabled in Customization $\rightarrow$ Projects and accounts section 41.8.

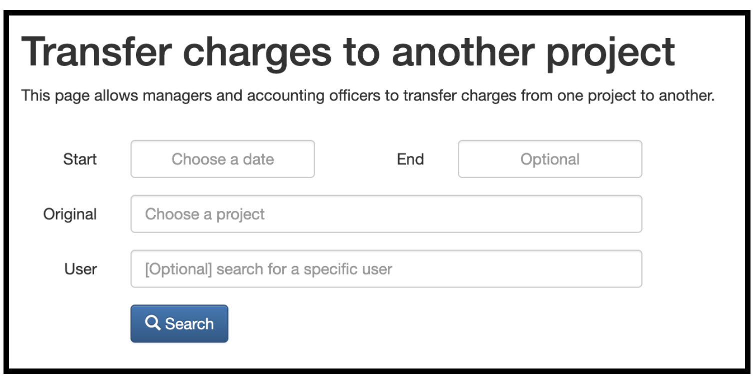


Figure 38.1: *Transfer charges page*

38.1 Usage

To transfer charges, you must first search for them:

- Pick the start date and the end date (optional) (Figure 38.2).

Figure 38.2: *Transfer charges dates selection*

- Enter the name of the project and select it from the list (Figure 38.3).

Figure 38.3: *Transfer charges project selection*

- Optionally, enter the name of the specific user to transfer charges for and select it from the list (Figure 38.4).

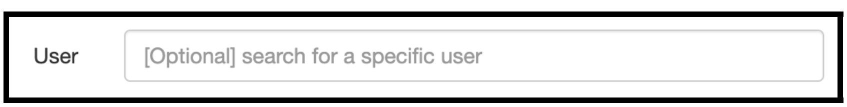


Figure 38.4: *Transfer charges user selection*

- Click the search button to look for the charges (Figure 38.5).

Figure 38.5: *Transfer charges search button*

If there are any charges matching the project for the date range, they will be displayed below the form (Figure 38.6).

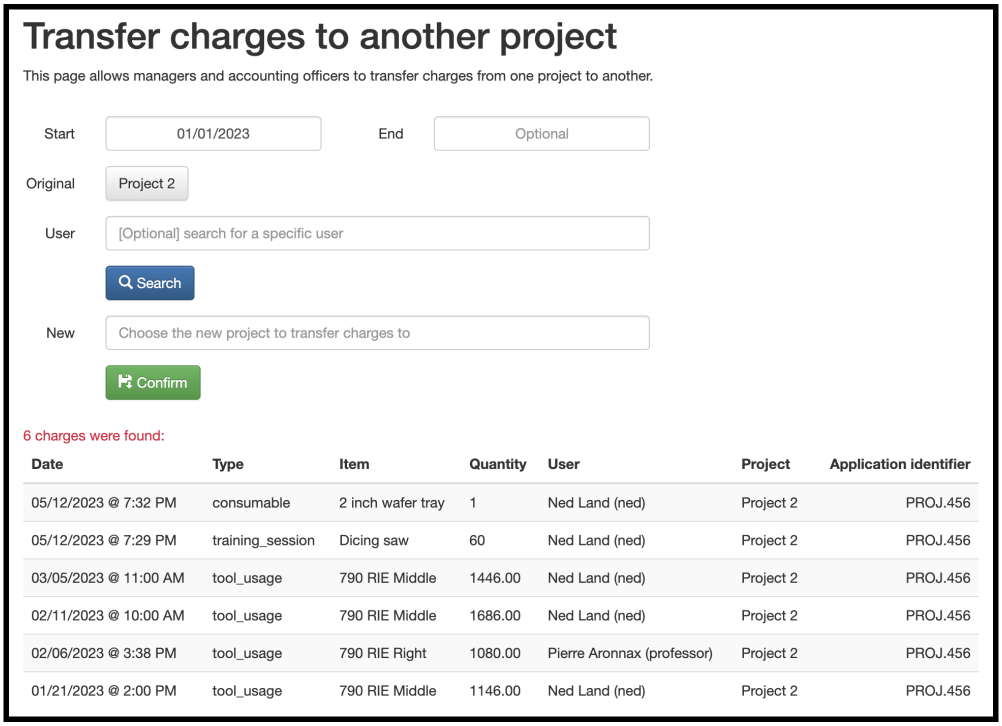


Figure 38.6: *Transfer charges search results*

- Enter the name of the new project and select it from the list (Figure 38.7).

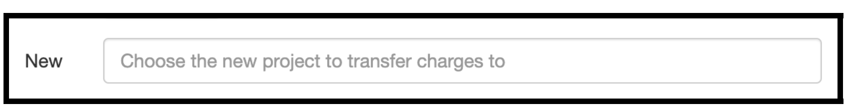


Figure 38.7: *Transfer charges new project selection*

- Finally, click the confirm button to transfer the charges (Figure 38.8).

Figure 38.8: *Transfer charges confirm button*

If the charges were transferred successfully:

- The new project will be set on all previous charges
- A success message will be displayed (Figure 38.9).

Figure 38.9: *Transfer charges success message*

38.2 Web address

The transfer charges page is accessible at site-address/projects/transfer_charges/. The page is accessible from the navigation bar by clicking Administration then clicking Transfer charges.

38.3 Mobile device transfer charges page

There are no mobile device views for the transfer charges page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

38.4 Transfer charges page customizations

This feature needs to be enabled in Customization $\rightarrow$ Projects and accounts section 41.8.

CHAPTER 39

Users (any staff role – read-only for staff and accounting)

The users page provides an interface to add new users and update existing users (Figure 39.1). Users can be associated with projects, tools, and physical access areas from this dialog. However, this feature exposes a limited number of parameters of the user table that are necessary to create users. A role beyond user must be defined in the users table of the database discussed in the Detailed administration → Users section 43.71.

User office and managers have full access to this feature however, other staff member only have read-only access.

Chapter 39 Users (any staff role – read-only for staff and accounting)

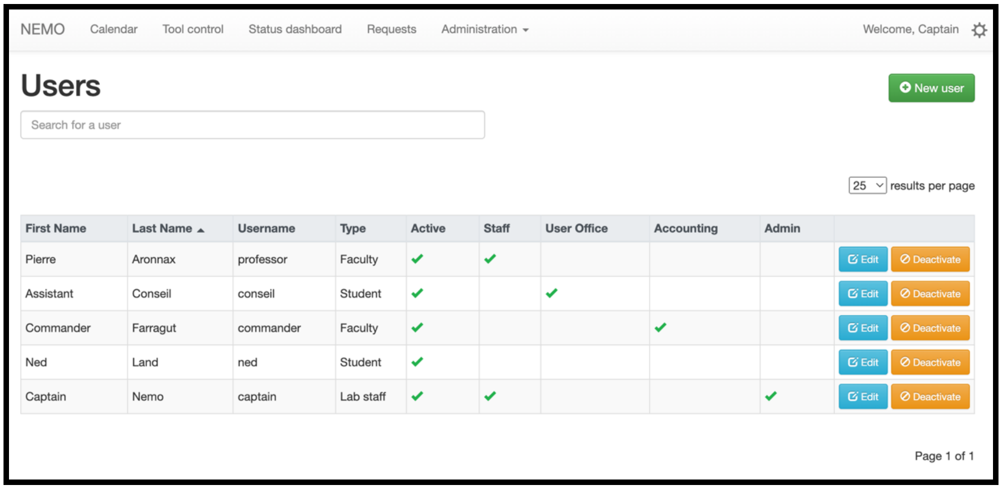


Figure 39.1: *Users page*

39.1 Create new user

To create a new user:

- Click the new user button (Figure 39.2).

Figure 39.2: *Users new user button*

- The new user form will open (Figure 39.3, Figure 39.4). The items displayed on the form depend on the functionality that has been defined in NEMO.

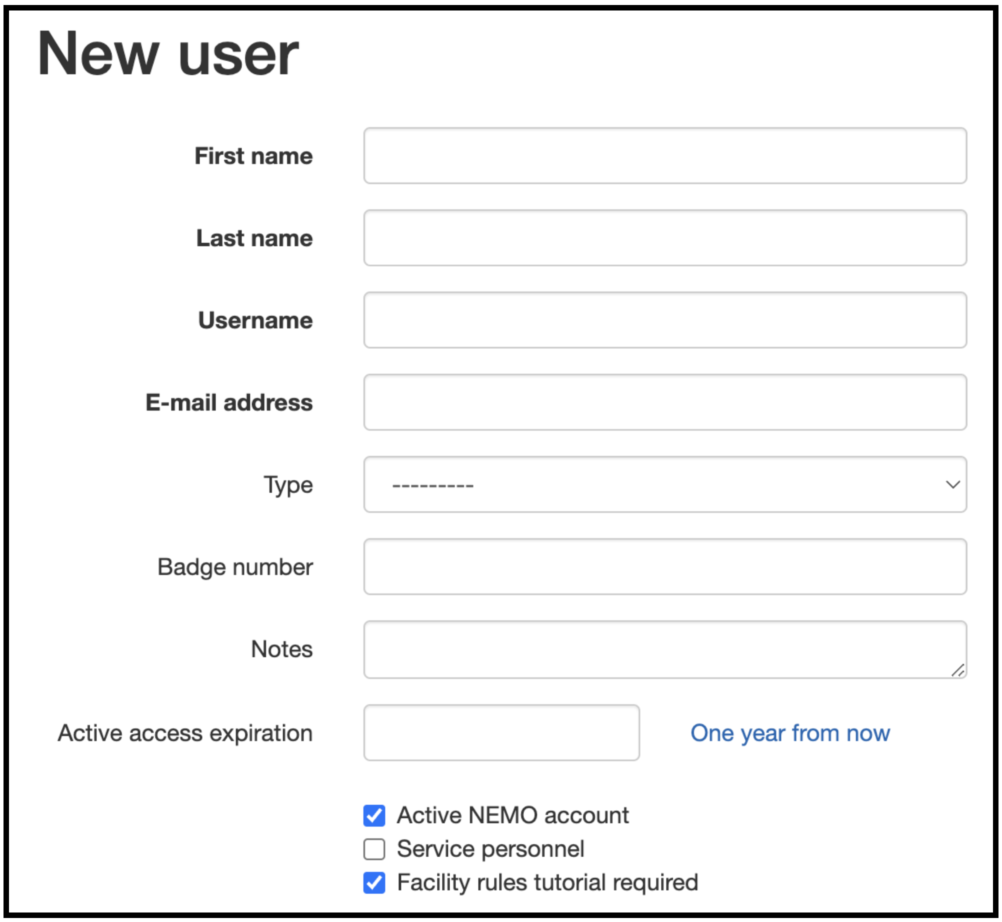


Figure 39.3: *Users new user form*

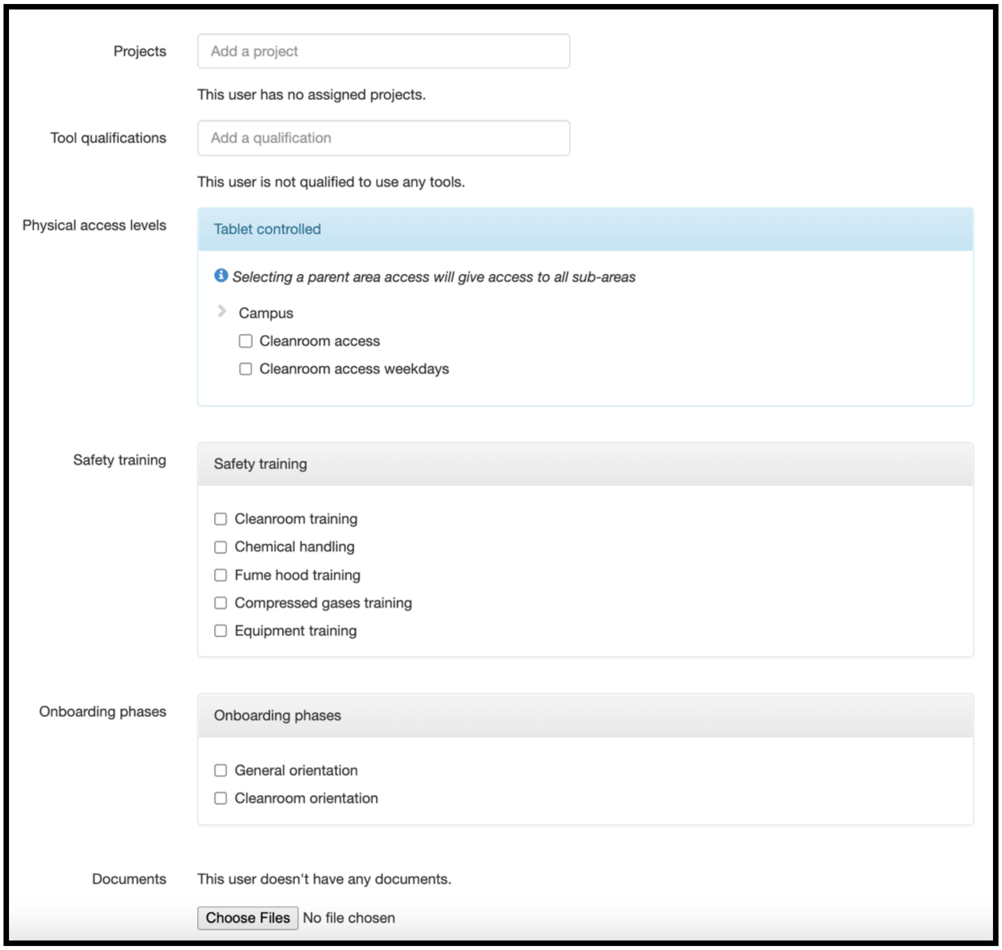


Figure 39.4: *Users new user form continued*

- Required: enter first name in dialog box (Figure 39.5).

Figure 39.5: *New user first name dialog box*

Required: enter last name in dialog box (Figure 39.6).

Figure 39.6: *New user last name dialog box*

- Required: enter username in dialog box (Figure 39.7). Some extra validation on the username format can be added by setting USERNAME_REGEX in settings.py.

Figure 39.7: *New user username dialog box*

- Required: enter email address in dialog box (Figure 39.8).

Figure 39.8: *New user email address dialog box*

- Select user type from dropdown (Figure 39.9). User types are defined in the user types table of the database on the Detailed administration → User types page in section 43.70.

Figure 39.9: *New user type dialog box*

- Enter a badge number that is associated with the user for accessing doors and kiosks (Figure 39.10). This is easily accomplished by having a badge reader on a computer where user profiles are created. Click inside of the dialog box then scan the badge.

Figure 39.10: *New user badge number dialog box*

- Enter notes for the user (Figure 39.11).

Figure 39.11: *New user notes dialog box*

- Enter an access expiration date (Figure 39.12). This can be useful to track safety training end dates or project expiration dates and will automatically turn off the users access on the designated date. Leave blank for no expiration.

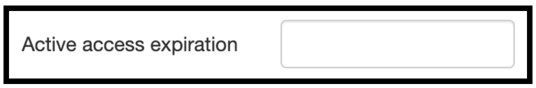


Figure 39.12: *New user access expiration dialog box*

  - Clicking the one year from now will automatically set the date (Figure 39.13).

Figure 39.13: *New user access expiration one-year quick link*

- Clicking in the date dialog box will display the calendar dialog (Figure 39.14).

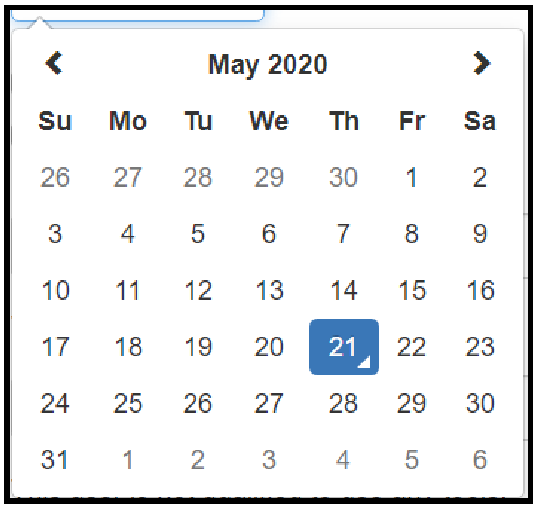


Figure 39.14: *New user access expiration calendar dialog*

- Navigate the calendar and click the date to update the dialog box.

• Make user active or not active by checking the checkbox (Figure 39.15). By default, a new user is active. A user that is not active cannot access NEMO or have reservations or tool usage performed on their behalf. Any change in a user status is recorded in the activity histories table of the database detailed in the Detailed administration → Activity histories section 43.3.

Figure 39.15: *New user active checkbox*

• Give users the service personnel role by checking the checkbox. Service personnel can operate qualified tools without a reservation even when they are shutdown or during an outage and can access authorized areas without a reservation (Figure 39.16).

Figure 39.16: *New user service personnel checkbox*

- Select facility rules tutorial required or not required by checking the checkbox (Figure 39.17). By default, it is required for new users. The default can be changed in the Customization → User settings section. This will display the Facility tutorial and block user tool reservations and tool login.

Figure 39.17: *New user training required checkbox*

- If the identity service is in use, select the domain the user belongs to (Figure 39.18). If only one domain has been defined, it will be selected automatically (Figure 39.19). The identity service is discussed in the Configuring NEMO settings → Identity service section.

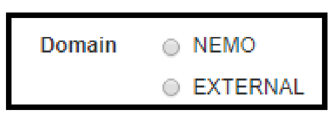


Figure 39.18: *New user domain selection*

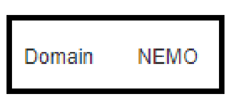


Figure 39.19: *New user single domain*

- Enter projects to associate the user with (Figure 39.20).

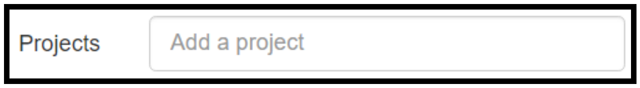


Figure 39.20: *New user project dialog box*

- A list of projects is returned as characters are typed (Figure 39.21). The project can be selected from the return list at any time by clicking the project name. Repeat for all projects.

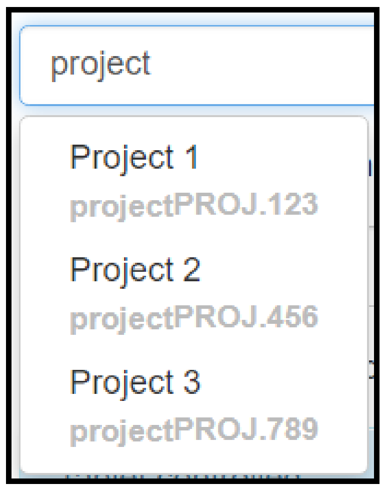


Figure 39.21: *New user projects return list*

- The selected project will appear under the dialog (Figure 39.22). Click the ⊗ to remove the user from the project.

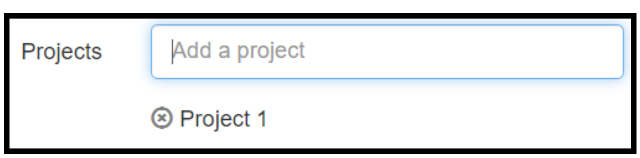


Figure 39.22: *New user project added*

- Enter tools the user is qualified on (Figure 39.23).

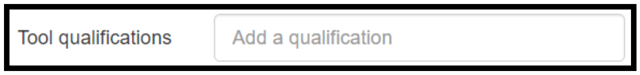


Figure 39.23: *New user tool qualification dialog box*

- A list of tools is returned as characters are typed (Figure 39.24). The tool can be selected from the return list at any time by clicking the tool name. Repeat for all tools.

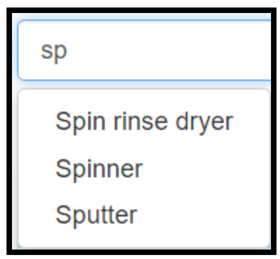


Figure 39.24: *New user tool qualification return list*

- The selected tool will appear under the dialog (Figure 39.25). Click the ⊗ to remove a tool qualification.

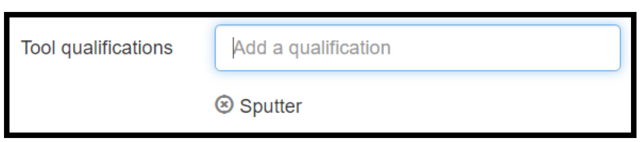


Figure 39.25: *New user tool qualification added*

- If NEMO will control area access permissions, a dialog for physical access levels will be displayed (Figure 39.26).

Figure 39.26: *New user physical access levels*

– Check the box for the access levels for the user (Figure 39.27). The physical access levels are a combination of physical areas and access schedules which are defined in the Detailed administration → Physical access levels table, see section 43.32. Areas may also have doors associated with them that are accessed through entrance tablets (see chapter 53).

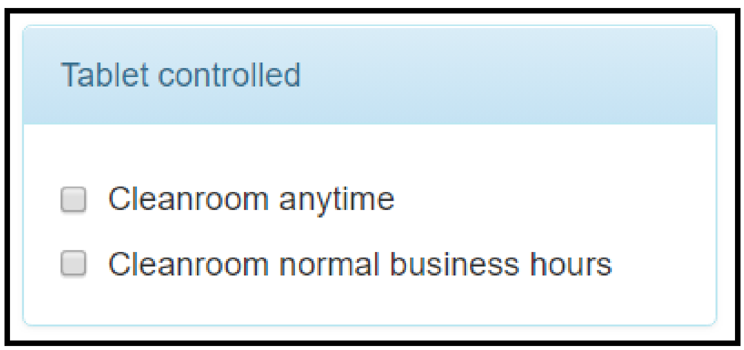


Figure 39.27: *New user NEMO controlled doors*

– Doors and access periods that are controlled by an external access control system can be setup to communicate permissions through the identity service. Any physical access levels available for NEMO to set user permissions on will be listed as badge-reader controlled (Figure 39.28).

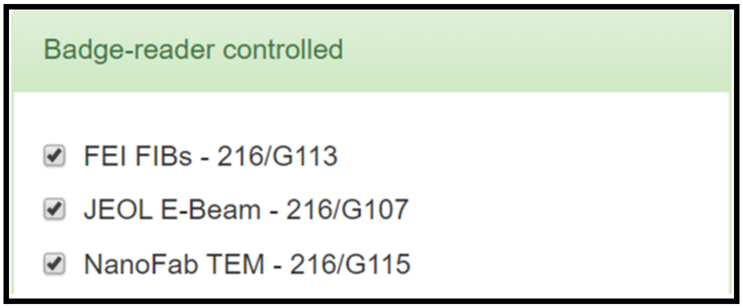


Figure 39.28: *New user external access control*

– Select physical access levels to assign to the user by checking the checkboxes.

- If onboarding phases exist, select the ones that apply to this user by checking the checkboxes (Figure 39.29). Onboarding phases are defined in Detailed administration → Onboarding phases section 43.31.

Figure 39.29: *New user onboarding phases*

- If safety trainings exist, select the ones that apply to this user by checking the checkboxes (Figure 39.30). Safety trainings are defined in Detailed administration → Safety trainings section 43.45.

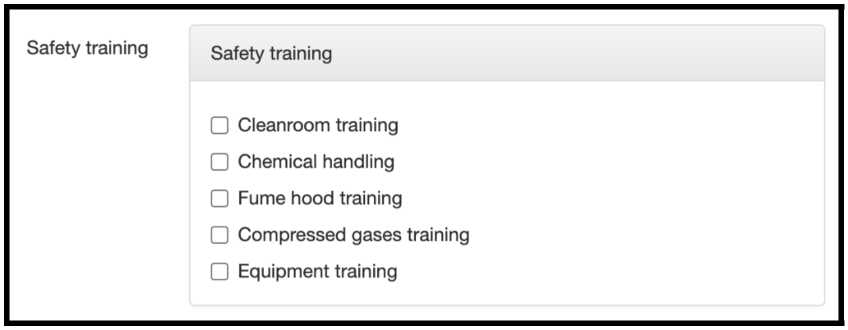


Figure 39.30: *New user safety trainings*

- If user documents are enabled in Customization → User, you can select and upload multiple files by clicking the choose files button (Figure 39.31).

Figure 39.31: *New user choose files button*

- Click the create user button to save the user information (Figure 39.32).

Figure 39.32: *New user create user button*

- If the user was recorded successfully:
  - Any externally controlled door accesses are updated through the identity service.
  - A record is written in the users table of the database creating the user.
  - Any tool qualifications selected are written to the membership table.
  - Any physical access levels granted are written to the membership table.
  - Any projects selected are written to the membership table.

- If the user was not recorded successfully:
  - If required fields are left blank, a notice message will be displayed at the field (Figure 39.33).

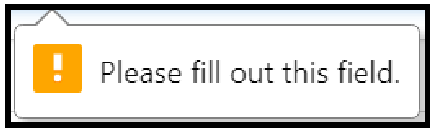


Figure 39.33: *New user blank field error*

  - If an invalid email address is entered, a warning message will appear at the top of the page (Figure 39.34) and an error message will be displayed at the email address dialog box (Figure 39.35).

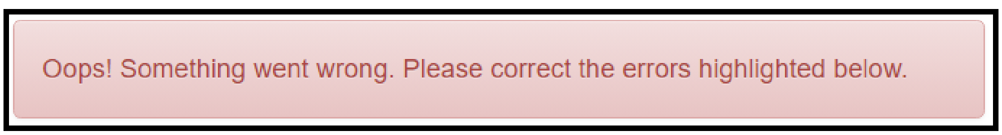


Figure 39.34: *New user error message*

Figure 39.35: *New user bad email address message*

39.2 Modify existing user

To modify an existing user:

- From the users page, enter a user name in the search dialog (Figure 39.36).

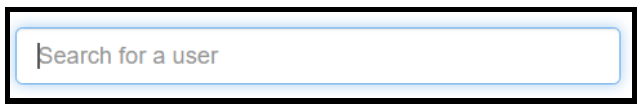
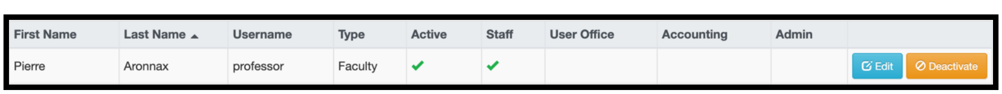


Figure 39.36: *User page search dialog*

- A list of users is returned as characters are typed (Figure 39.37). The user can be selected from the return list at any time by clicking the user's name.

Figure 39.37: *User page search return list*

- You can also click on the edit button of the users list (Figure 39.38).



First Name	Last Name ▲	Username	Type	Active	Staff	User Office	Accounting	Admin	
Pierre	Aronnax	professor	Faculty	✔	✔				Edit Deactivate

Figure 39.38: *User list edit*

- Upon selecting the user, the modify user page will be displayed (Figure 39.39).

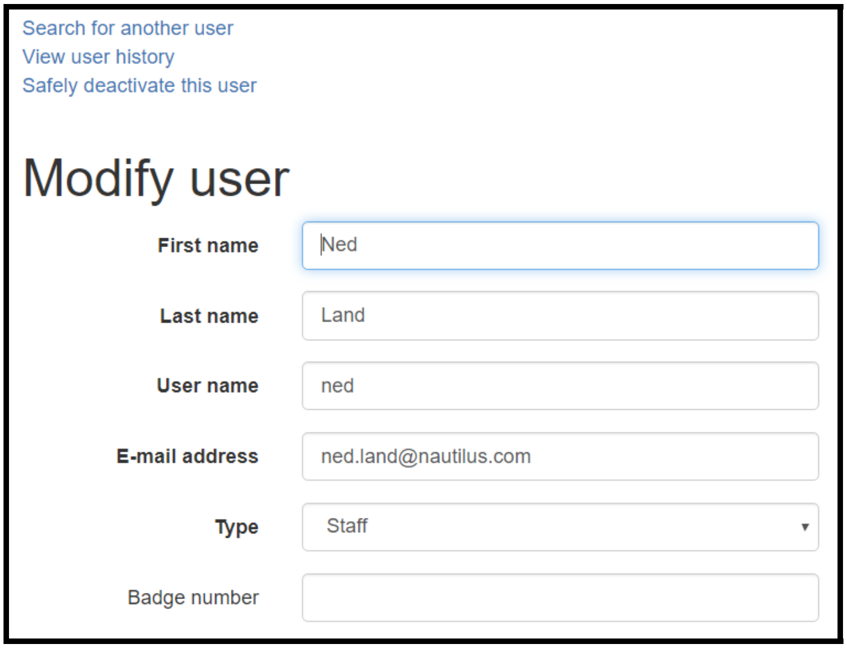


Figure 39.39: *Modify user page*

- The modify user dialog reads the information currently saved user profile including project associations, tool qualifications, and physical access levels. They can be changed under the same process detailed in the create user section above. Once changes are complete, click the save changes button at the bottom of the page (Figure 39.40).

Figure 39.40: *Modify user save button*

39.3 View user history

From the modify user page, click on the view user history button (Figure 39.41).

Figure 39.41: *Modify user view history link*

- Clicking the link opens the membership history page for this user (Figure 39.42).
- The membership history tracks several user actions, who took them, and when. Records are stored in the membership histories table of the database detailed in the Detailed administration → Membership histories section.
  - Activated or deactivated user.
  - Joined or removed from a project.
  - Joined or removed from a tool qualification.
  - Joined or removed from a physical access level.
  - Any tracked changes from the auditlog library.

History for Ned Land (ned)

Date & time	User	Action
Thursday, April 9th, 2020 @ 2:38 PM	Captain Nemo (captain)	This user now belongs to physical access level "Cleanroom anytime".
Monday, April 13th, 2020 @ 2:43 PM	Captain Nemo (captain)	This user no longer belongs to project "Project 2".
Monday, April 13th, 2020 @ 2:43 PM	Captain Nemo (captain)	This user no longer belongs to project "Project 3".
Tuesday, April 14th, 2020 @ 3:49 PM	Captain Nemo (captain)	User deactivated.
Tuesday, April 14th, 2020 @ 3:49 PM	Captain Nemo (captain)	This user no longer belongs to tool "PECVD".
Tuesday, April 14th, 2020 @ 3:49 PM	Captain Nemo (captain)	This user no longer belongs to physical access level "Cleanroom anytime".
Tuesday, April 14th, 2020 @ 3:49 PM	Captain Nemo (captain)	This user no longer belongs to project "Project 1".
Tuesday, April 14th, 2020 @ 3:49 PM	Captain Nemo (captain)	User activated.
Tuesday, April 14th, 2020 @ 11:01 PM	Captain Nemo (captain)	This user now belongs to physical access level "Cleanroom anytime".
Tuesday, April 14th, 2020 @ 11:03 PM	Captain Nemo (captain)	This user now belongs to project "Project 1".
Thursday, April 16th, 2020 @ 5:34 PM	Captain Nemo (captain)	This user now belongs to tool "PECVD".
Thursday, April 16th, 2020 @ 5:34 PM	Captain Nemo (captain)	This user now belongs to tool "Sputter".

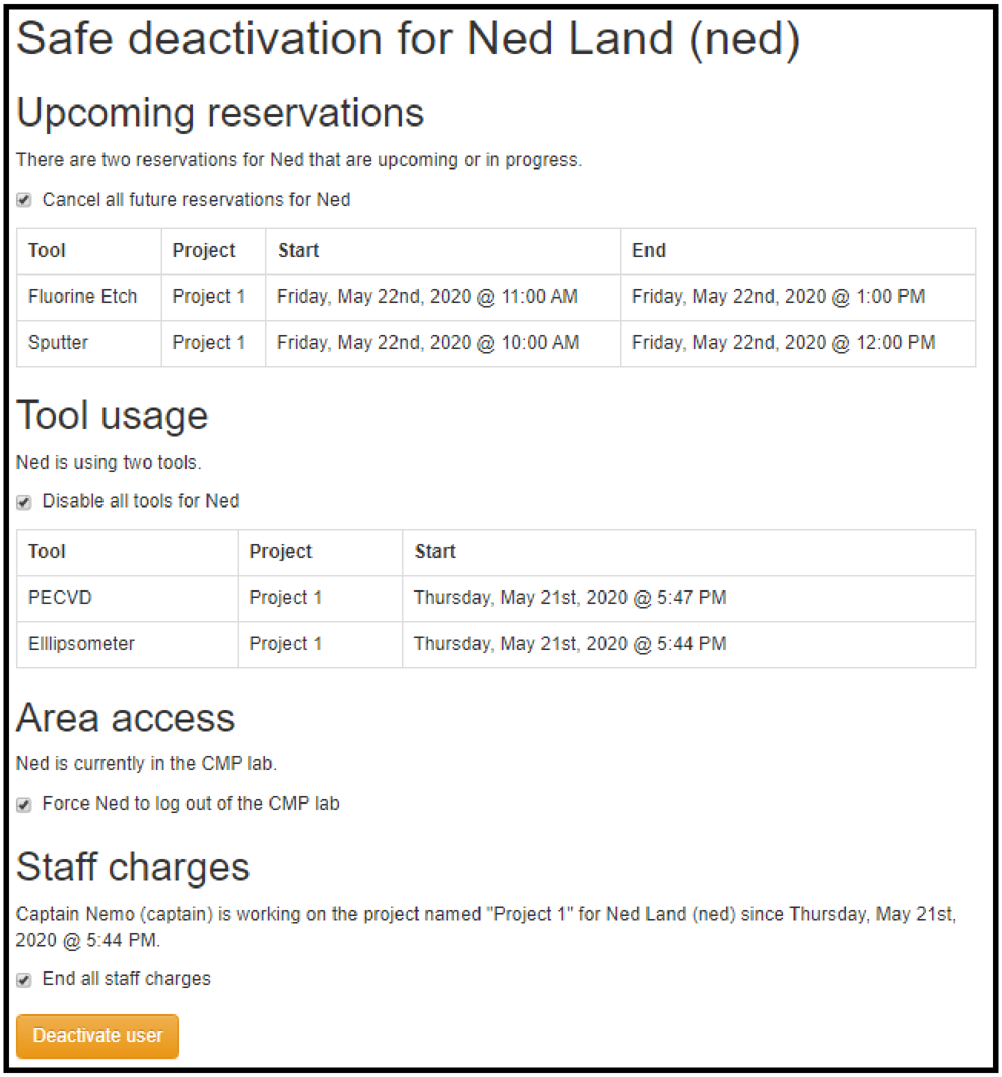
Figure 39.42: *Modify user history detail*

39.4 Safely deactivate this user

From the user list, click the deactivate button (Figure 39.43). This is only displayed if an active user was selected. Safely deactivating a user will ensure no additional billable activity can be accumulated once the user is deactivated.

Figure 39.43: *User safe deactivation link*

- Clicking the link checks to be sure it is safe to deactivate a user by checking for current billable tasks such as:
  - Future reservations.
  - Tools currently in use.
  - Currently in an access-controlled area.
  - Staff charges currently in progress.
- Any current activity is displayed by category (Figure 39.44).
- Checkboxes are selected by default to remove any current billable tasks. Uncheck them to skip removing a category of tasks.
- Clicking the deactivate user button will cancel any reservations and end any current charges for checked usage categories.



Safe deactivation for Ned Land (ned)

Upcoming reservations

There are two reservations for Ned that are upcoming or in progress.

☑ Cancel all future reservations for Ned

Tool	Project	Start	End
Fluorine Etch	Project 1	Friday, May 22nd, 2020 @ 11:00 AM	Friday, May 22nd, 2020 @ 1:00 PM
Sputter	Project 1	Friday, May 22nd, 2020 @ 10:00 AM	Friday, May 22nd, 2020 @ 12:00 PM

Tool usage

Ned is using two tools.

☑ Disable all tools for Ned

Tool	Project	Start
PECVD	Project 1	Thursday, May 21st, 2020 @ 5:47 PM
Ellipsometer	Project 1	Thursday, May 21st, 2020 @ 5:44 PM

Area access

Ned is currently in the CMP lab.

☑ Force Ned to log out of the CMP lab

Staff charges

Captain Nemo (captain) is working on the project named "Project 1" for Ned Land (ned) since Thursday, May 21st, 2020 @ 5:44 PM.

☑ End all staff charges

Deactivate user

Figure 39.44: *User safe deactivate page*

39.5 Web address

The users page is accessible at site-address/users/. The page is accessible from the navigation bar by clicking Administration then clicking Users.

39.6 Mobile device configuration agenda page

37.6 Mobile device configuration agenda page There are no mobile device views for the users page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

39.7 Users page customizations

39.7.1 User settings

There are several customizations available for user pages. They are discussed in the Customizations → User section 41.16.

39.7.2 Identity service

The identity service requires custom programming to provide a bridge between NEMO and outside systems such as multiple LDAP servers for different types of users, and external access control systems to authorize users to access doors. It is beyond the scope of this manual to provide programming examples for bridge software, but details of the NEMO settings can be found in the Configuring NEMO settings → Identity service section 54.2.

CHAPTER 40

Projects (PIs only)

40.1 Usage

This page simply displays the projects the user is a Principal Investigator on. Project Investigators can be set in the Projects administration page, see section 43.36. It will display basic information about the project as well as users on the project (Figure 40.1).

Chapter 40 Projects (PIs only)

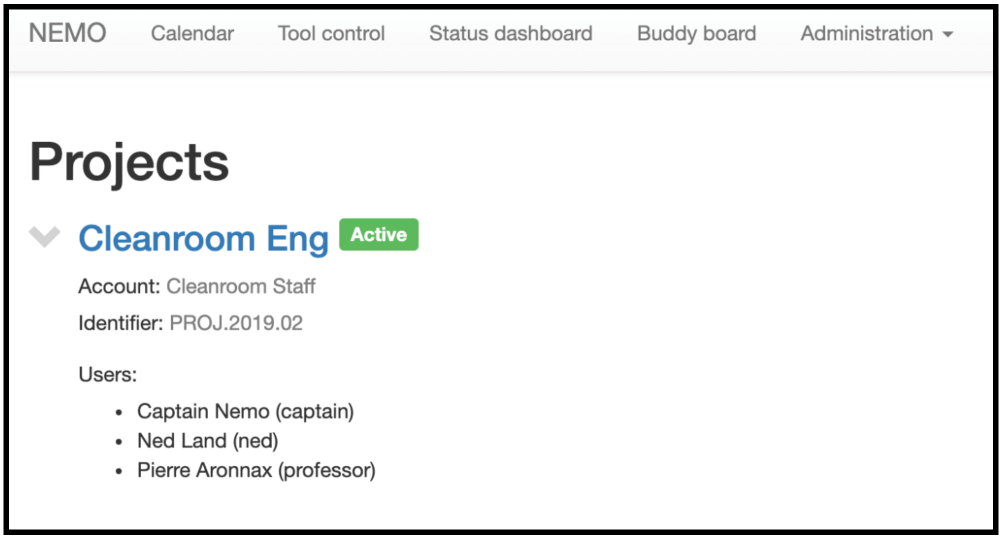


Figure 40.1: *Projects view*

40.2 Web address

The projects page is accessible at site-address/projects/. The page is accessible from the navigation bar by clicking Administration then clicking Projects (Figure 40.2).

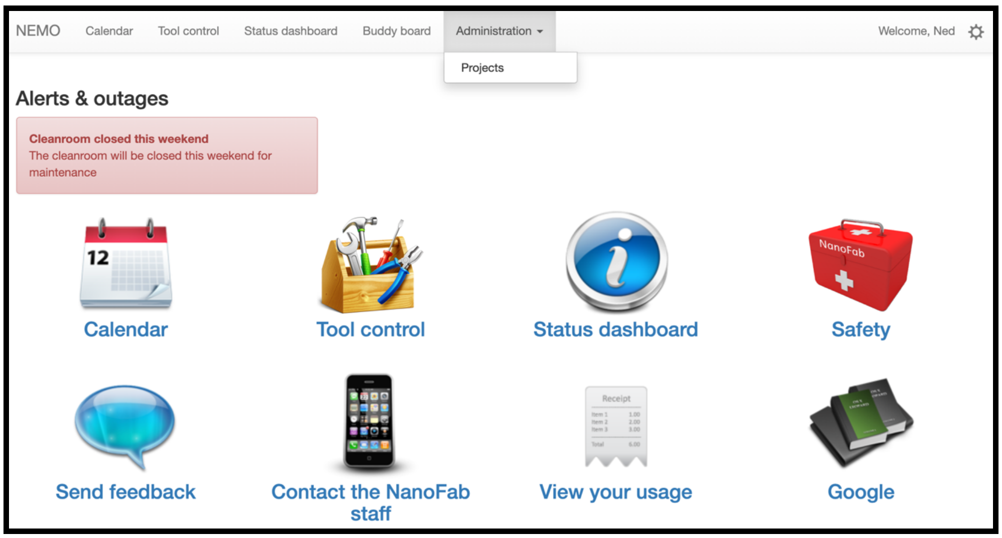


Figure 40.2: *Projects view address*

40.3 Mobile device

There are no mobile device views for the projects page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

40.4 Projects page customizations

There are no customizations for the projects page.

CHAPTER 41

Customization (admin only)

The customization section can be used to tailor NEMO to the needs of a particular lab. Customizations include where NEMO will send emails, what the emails should look like, page customizations, and functional settings. HTML content creation and formatting are beyond the scope of this manual. Many resources can be found online. However, sample email templates can be found on the NEMO repository on GitHub at
https://github.com/usnistgov/NEMO/tree/master/resources/emails

Chapter 41 Customization (admin only)

41.1 Adjustment requests settings

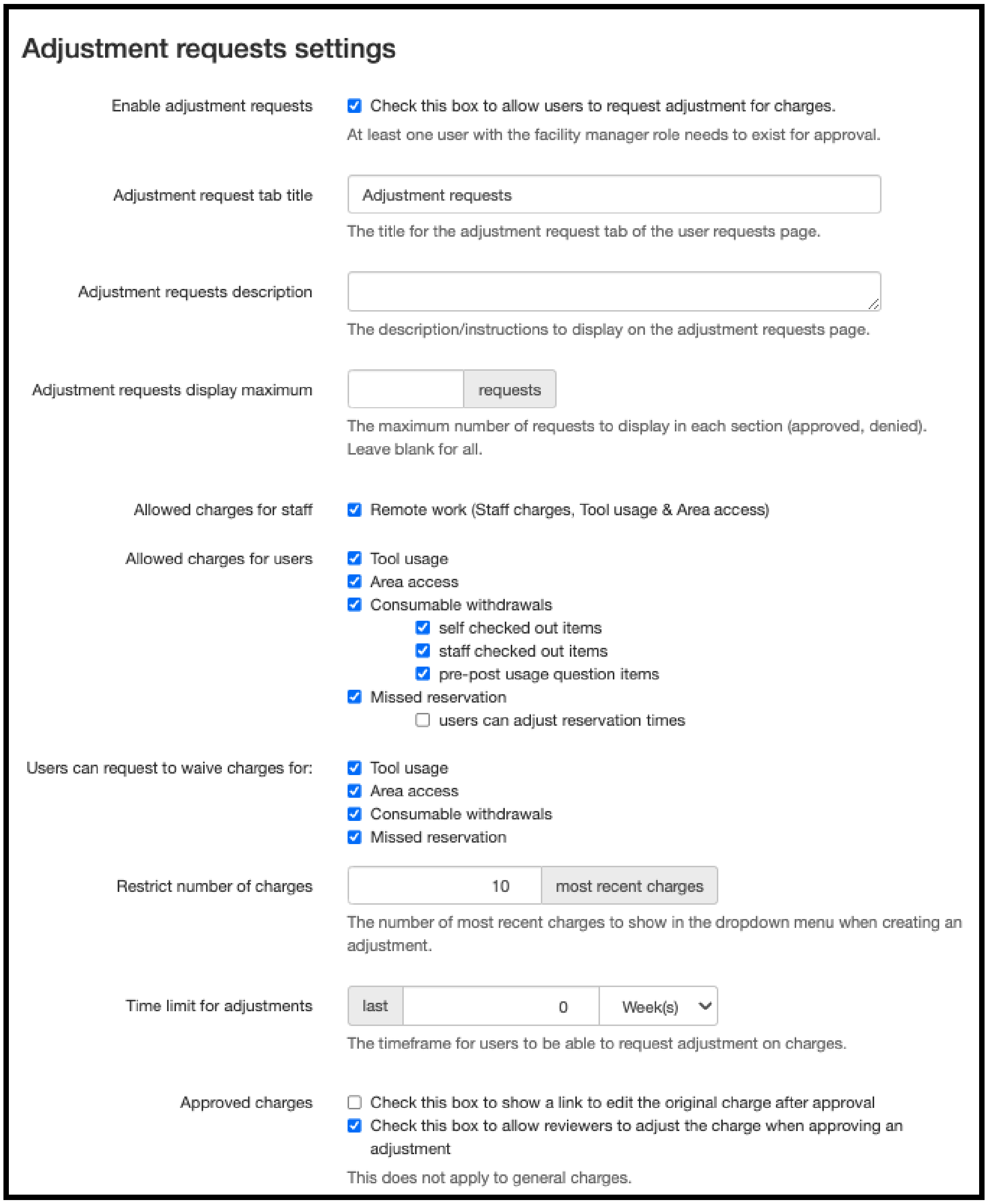


Figure 41.1: *Customization adjustment requests settings*

- Check the Enable adjustment requests checkbox to enable the feature (Figure 41.2).

Figure 41.2: *Customization adjustment requests enable*

- The default adjustment request tab title is “Adjustment requests” and is displayed in the Request page, on the tab for the adjustment requests (Figure 41.3).
  To edit, click on the text field and enter the desired title (Figure 41.4).

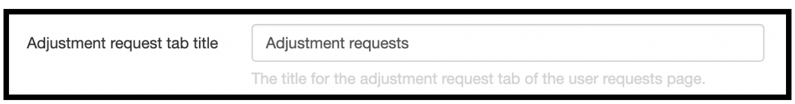


Figure 41.3: *Customization adjustment request tab title*

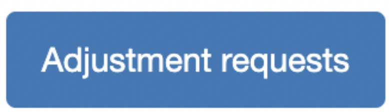


Figure 41.4: *Customization adjustment request tab*

- The default message for Adjustment requests description is blank. To edit, click in the dialog box and enter the desired message (Figure 41.5). Note that carriage returns will be displayed to ease visual organization of information.

Figure 41.5: *Customization adjustment requests description*

- The default number of adjustment requests to display is blank, which means all the requests will be displayed for users in Approved, Denied and Expired sections. The optional limit does not apply to pending requests. To edit, click in the dialog box and enter the desired number (Figure 41.6).

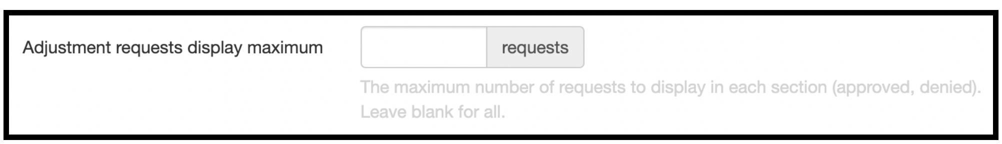


Figure 41.6: *Customization adjustment requests display maximum*

- Check the remote work checkbox to allow staff members to request adjustments on the remote work they do (Figure 41.7).

Figure 41.7: *Customization adjustment requests allowed staff charges*

- Check the allowed charges checkboxes to allow users to request adjustments on for tools usage, area access, consumable withdrawals and/or missed reservations. Check the "user can adjust reservation times" checkbox to allow users to submit new times for the missed reservation they are requesting an adjustment for (Figure 41.8).

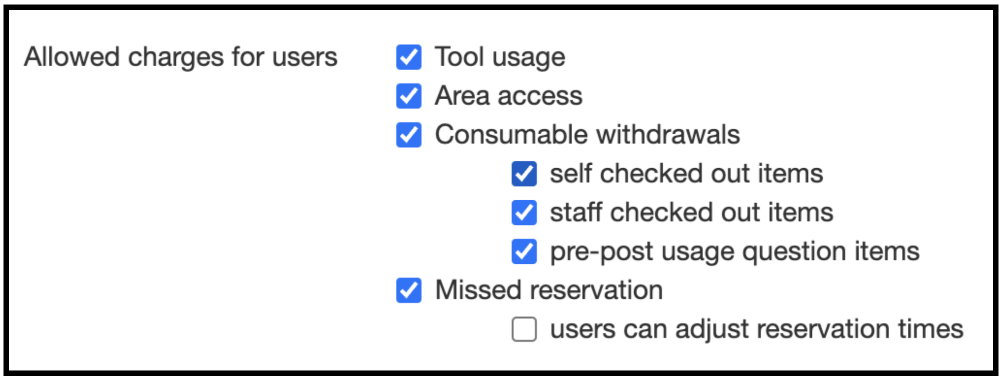


Figure 41.8: *Customization adjustment requests allowed user charges*

- Check the "Users can request to waive charges for" checkboxes to allow users to request charges be waived completely for tools usage, area access, consumable withdrawals or missed reservations (Figure 41.9).

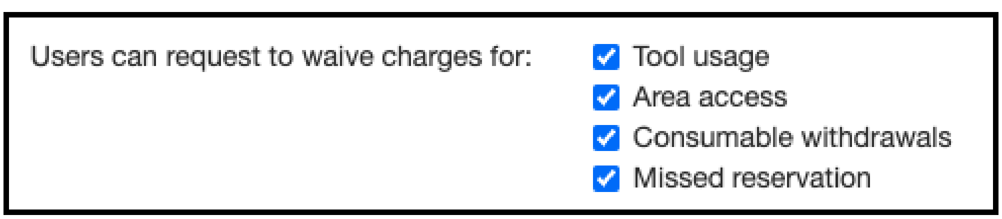


Figure 41.9: *Customization adjustment requests waive charges*

- Click the “Restrict number of charges” text box and enter a number to limit the charges to show in the dropdown box when creating a request from the request menu. (Figure 41.10).

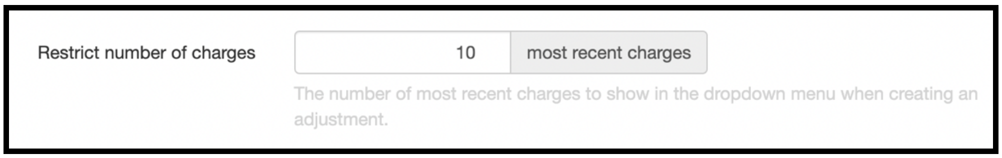


Figure 41.10: *Customization adjustment requests most recent charges allowed*

- Click the “Time limit for adjustments” text box and enter a number to limit the timeframe after which charges cannot be contested anymore. Click the dropdown menu to select the frequency (Days, Weeks, or Months) (Figure 41.11).

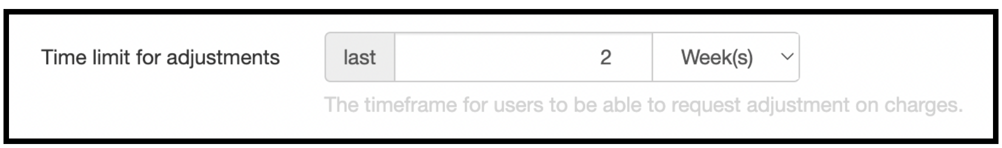


Figure 41.11: *Customization adjustment requests timeframe allowed for charges*

- The “show a link to edit the original charge after approval” checkbox is used to show a link to edit the charge directly in Detailed administration, after the adjustment has been approved and as long as the current user has the proper permission (for each charge type). (Figure 41.12).

Figure 41.12: *Customization adjustment requests edit approved charges*

- The "allow reviewers to apply the change when approving an adjustment" checkbox is used to show a button to apply the changes to the charge itself (the usage event or area access record will be changed), when applicable. If it's a general charge there is nothing to apply. (Figure 41.13).

Figure 41.13: *Customization adjustment requests apply change*

41.2 Application

The application settings can be used to allow users to manually log into and out of areas and to set the facility name, site title, and whether to enable remote work validation (Figure 41.14 & Figure 41.15).

The log in and log out features are useful for labs that use NEMO for door control in the event of an outage and for labs that do not use door control but want to track lab access. Tools can be configured to require a user to be logged into an area before they will be allowed to activate the tool.

Customizing the facility name and site title can be used to tailor the application to your institution.

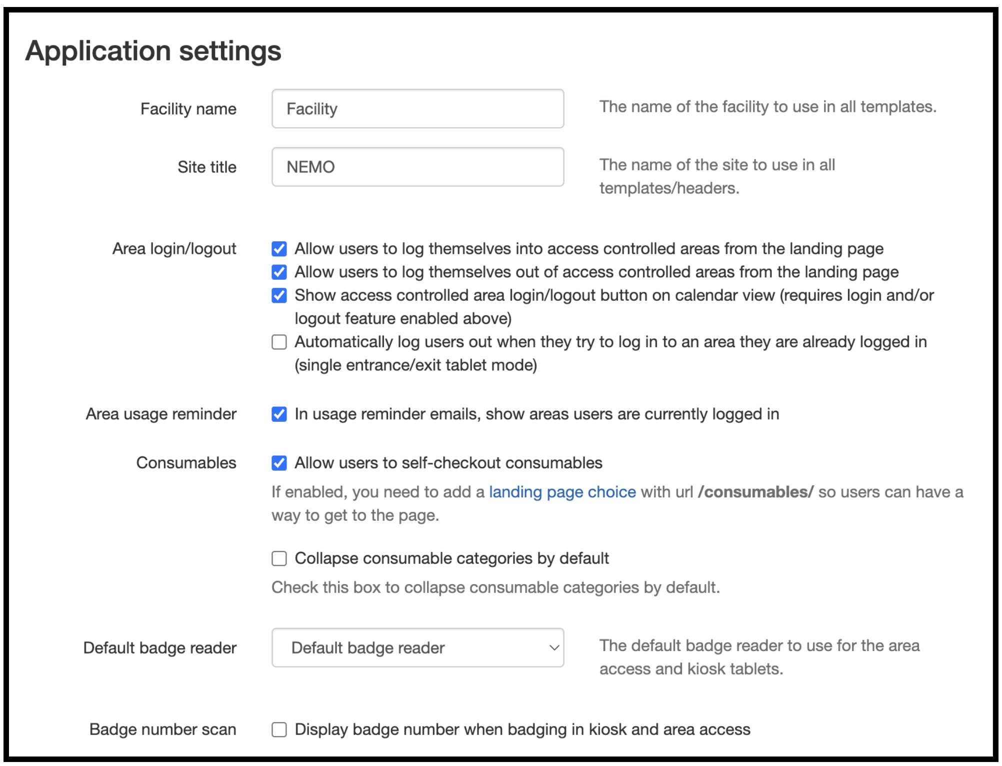


Figure 41.14: *Customization application settings*

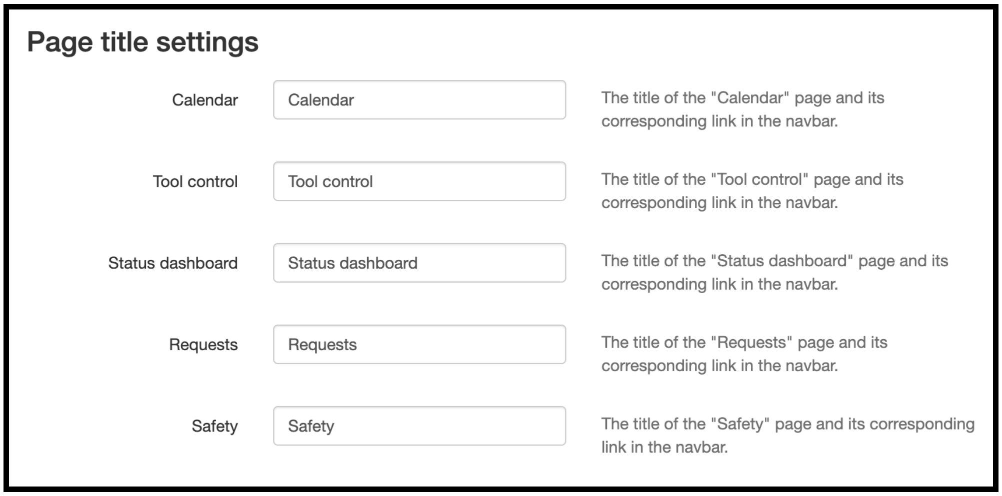


Figure 41.15: *Customization page title settings*

The default facility name is “Facility” and will be displayed in all templates (Figure 41.16). To edit, click in the dialog box and enter the desired facility name.

Figure 41.16: *Customization application setting facility name*

The default site title is “NEMO” and will be displayed in all templates and headers (Figure 41.17). To edit, click in the dialog box and enter the desired site name.

Figure 41.17: *Customization application setting site title*

If the “allow users to log themselves into access controlled areas” checkbox is checked, the log in dialog is displayed (Figure 41.18) on the NEMO landing page as described.

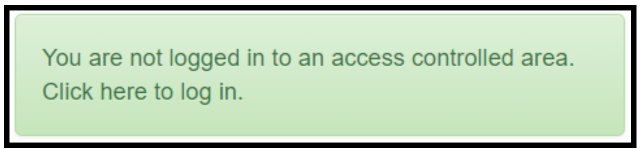


Figure 41.18: *Landing page log in dialog box*

If the “allow users to log themselves out of access controlled areas” checkbox is checked, the log out dialog is displayed (Figure 41.19) on the NEMO landing page as described.

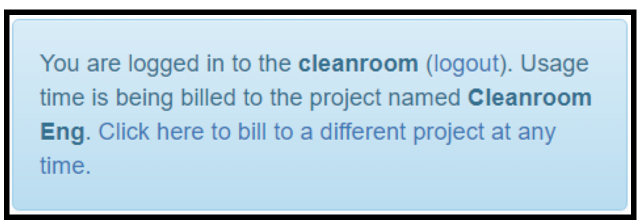


Figure 41.19: *Landing page log out dialog box*

If the “allow login/logout in the calendar view” checkbox is checked, the area login/logout button is displayed (Figure 41.20) on the NEMO calendar page header when an area is selected. This feature requires that the allow area login and/or allow area logout features above are enabled.

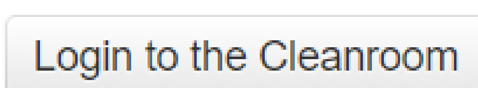


Figure 41.20: *Calendar page login button*

If the “Automatically log users out when they try to log in to an area they are already logged in (single entrance/exit tablet mode)” checkbox is checked, users who try to log into an area they are already logged in to will be logged out. This allows to use a single tablet for entrance/exit.

If the “In usage reminder emails, show areas users are currently logged in” checkbox is unchecked, the usage reminder emails will not include areas the user is logged in.

If the “Allow users to self-checkout consumables” checkbox is checked, users will be able to checkout/withdraw consumables/supplies themselves. However, since the “Supplies” menu item is in the Administration menu, for regular users to be able to access the page, a dashboard item needs to be added in Detailed administration → Landing page choices section 43.27 with the url “/consumables/”.

If the “Collapse consumable categories by default” checkbox is checked, the list of consumable categories will be collapsed by default in the supplies page discussed in section 35.

If there are badge reader configuration set in Detailed administration → Badge readers section 43.9, the default badge reader can be set here so the area access and kiosk tablet pages use the same default configuration. The “Default badge reader” option refers to the F2 (record) and F2 (send) configuration.

If the “Display badge number when badging in Kiosk and area access” checkbox is checked, the badge number will be displayed on the screen when it is read by the badge reader. By default, it will be hidden for security reasons.

- Page title settings:

The default Calendar name is “Calendar” and will be displayed in the main menu (Figure 41.21). To edit, click in the dialog box and enter the desired facility name.

Figure 41.21: *Customization page title setting calendar name*

The default Tool control name is “Tool control” and will be displayed in the main menu (Figure 41.22). To edit, click in the dialog box and enter the desired facility name.

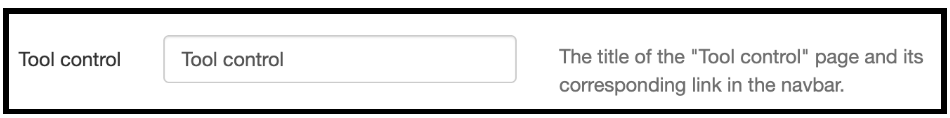


Figure 41.22: *Customization page title setting tool control name*

The default Status dashboard name is “Status dashboard” and will be displayed in the main menu (Figure 41.23). To edit, click in the dialog box and enter the desired facility name.

Figure 41.23: *Customization page title setting status dashboard name*

The default Requests name is “Requests” and will be displayed in the main menu (Figure 41.24). To edit, click in the dialog box and enter the desired facility name.

Figure 41.24: *Customization page title setting requests name*

The default Safety name is "Safety" and will be displayed in the main menu (Figure 41.25). To edit, click in the dialog box and enter the desired facility name.

Figure 41.25: *Customization page title setting safety name*

41.3 Calendar

The calendar settings can be used to set the default calendar view, first day of the week, default calendar start time, to customize how dates are displayed for international support, and to set the behavior for reservation confirmations.

41.3.1 Calendar Settings

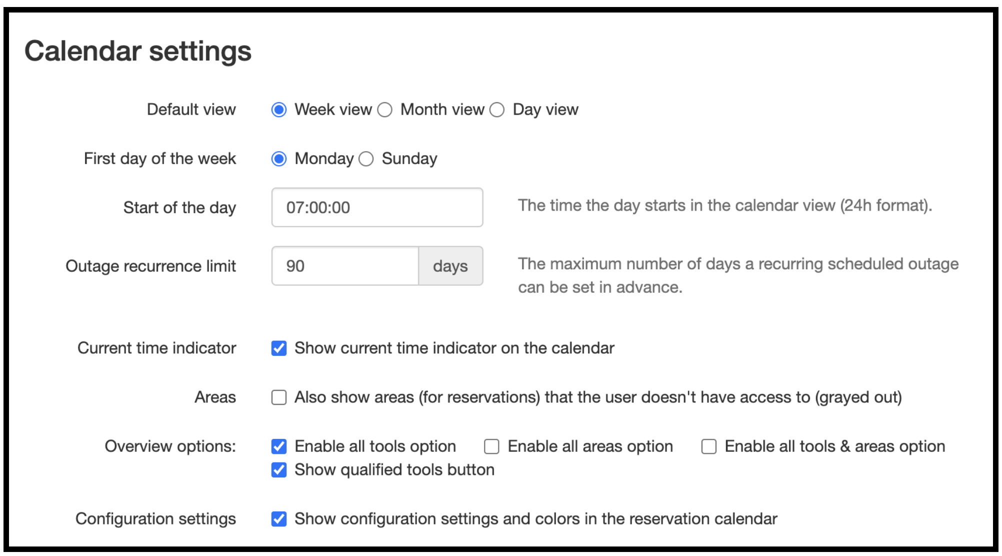


Figure 41.26: *Customization calendar settings*

The default view can be changed between week view, month view, or day view by checking the desired radio button (Figure 41.27).

Figure 41.27: *Customization calendar default view*

The first day of the week displayed on the week view and month view can be changed between Monday and Sunday by checking the desired radio button (Figure 41.28).

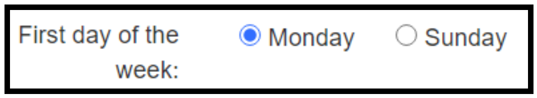


Figure 41.28: *Customization calendar first day of week*

The start time in the week view and day view can be set by entering a time in 24-hour format (Figure 41.29).

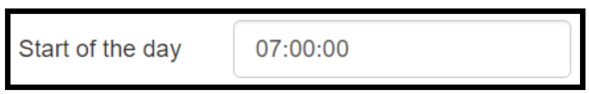


Figure 41.29: *Customization calendar start time*

The number of days in advance to create recurring outages can be set by entering an integer number (Figure 41.30).

Figure 41.30: *Customization calendar recurring outage days in advance*

The calendar will highlight the current day and can optionally display a red pointer to indicate the current time on day and week calendar views. Display the red pointer to indicate the time by checking the show current time indicator checkbox (Figure 41.31).

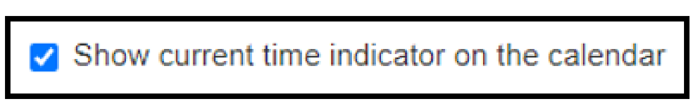


Figure 41.31: *Customization calendar time indicator*

The calendar will show a user the areas they specifically have permission to enter. However, a user can be given access to see the reservations for all areas by checking the Also show areas checkbox (Figure 41.32).

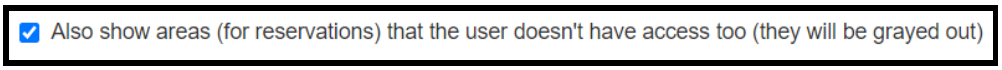


Figure 41.32: *Customization calendar show all areas checkbox*

The calendar can show options to display reservation/usage for all tools, all areas or all tools and areas as well as showing a button to show only qualified tools for non-staff users (Figure 41.33).

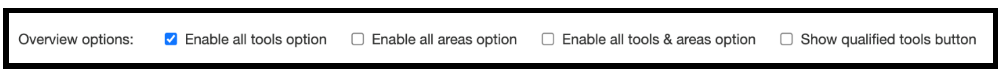


Figure 41.33: *Customization calendar overview options*

The calendar can show tool configuration settings picked by users when making a reservation directly in the main reservation feed (instead of having to go to the separate Configuration agenda feed) (Figure 41.34).

Figure 41.34: *Customization calendar configuration settings*

41.3.2 Calendar format

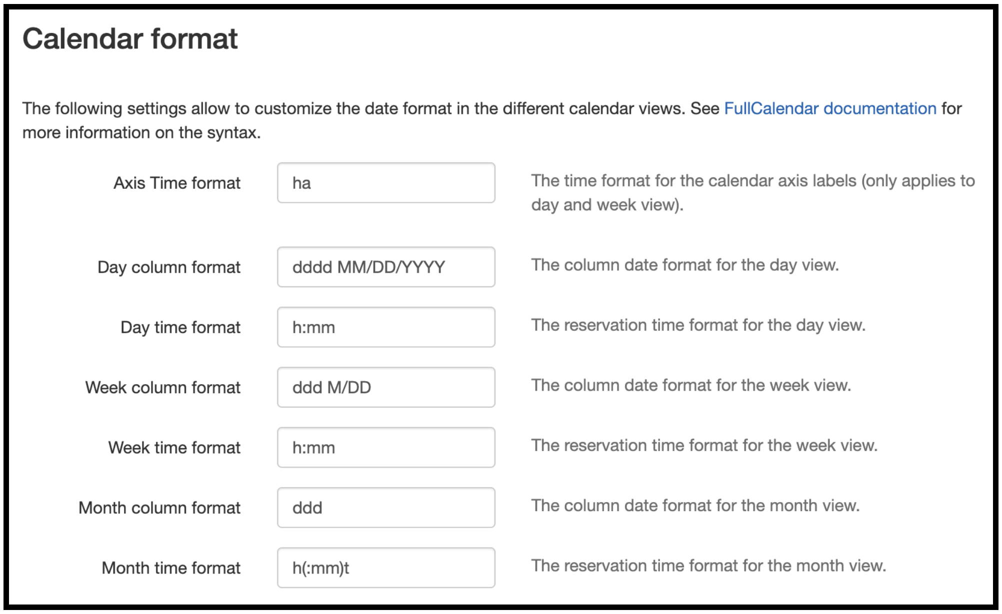


Figure 41.35: *Customization calendar format settings*

The Axis time format for the calendar can be customized by entering the format string in the dialog box (Figure 41.36). See the Calendar documentation in chapter 5 for more information on the syntax.

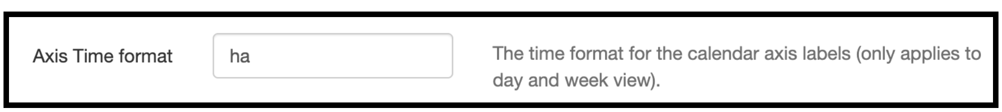


Figure 41.36: *Customization calendar axis time format*

The format used in the day column header can be customized by entering the format string in the dialog box (Figure 41.37). See the Calendar documentation in chapter 5 for more information on the syntax.

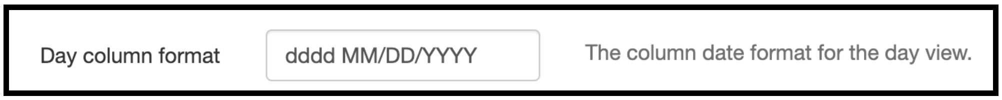


Figure 41.37: *Customization calendar day column format*

The event time format used in the day view can be customized by entering the format string in the dialog box (Figure 41.38). See the Calendar documentation in chapter 5 for more information on the syntax.

Figure 41.38: *Customization calendar day time format*

The format used in the week column header can be customized by entering the format string in the dialog box (Figure 41.39). See the Calendar documentation in chapter 5 for more information on the syntax.

Figure 41.39: *Customization calendar week column format*

The event time format used in the week view can be customized by entering the format string in the dialog box (Figure 41.40). See the Calendar documentation in chapter 5 for more information on the syntax.

Figure 41.40: *Customization calendar week time format*

The format used in the month column header can be customized by entering the format string in the dialog box (Figure 41.41). See the Calendar documentation in chapter 5 for more information on the syntax.

Figure 41.41: *Customization calendar month column format*

The event time format used in the month view can be customized by entering the format string in the dialog box (Figure 41.42). See the Calendar documentation in chapter 5 for more information on the syntax.

Figure 41.42: *Customization calendar month time format*

41.3.3 Reservation Confirmations

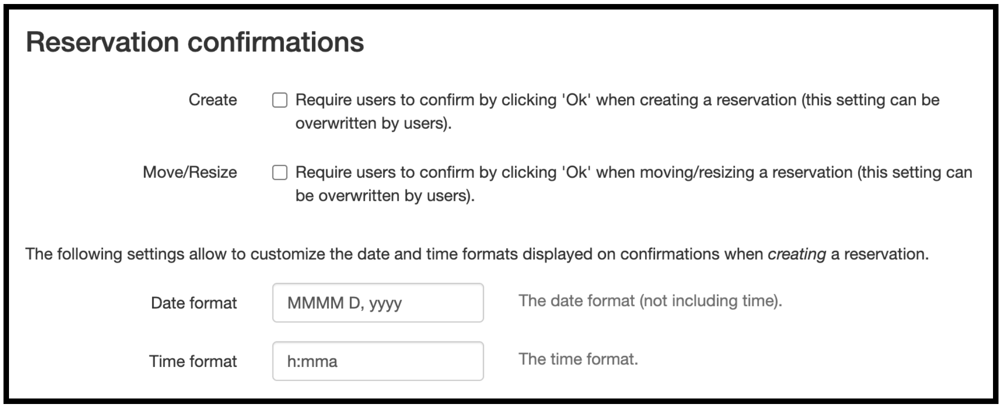


Figure 41.43: *Customization reservation settings*

When creating reservations, users can be shown a confirmation dialog to verify the information before confirming. The checkbox can be checked to enable it (Figure 41.44). Users can overwrite this setting in their preferences.

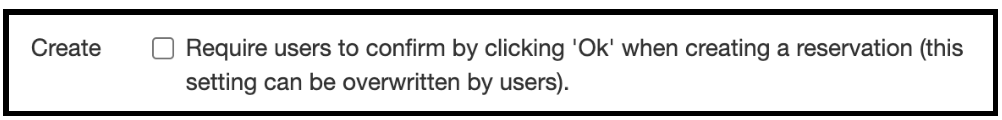


Figure 41.44: *Customization reservation confirmation create*

When moving and resizing reservations, users can be shown a confirmation dialog to verify the information before confirming. The checkbox can be checked to enable it (Figure 41.45). Users can overwrite this setting in their preferences.

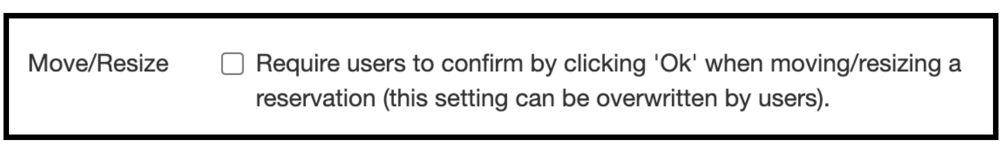


Figure 41.45: *Customization reservation confirmation move/resize*

The date format (Figure 41.46) and time format (Figure 41.47) used in the confirmation dialog can be customized as well.

Figure 41.46: *Customization reservation date format*

Figure 41.47: *Customization reservation time format*

41.4 Email Addresses

NEMO can send email messages in support of a variety of features (Figure 41.48). The email address customization provides the capability to send different types of email messages to different people or departments in the organization.

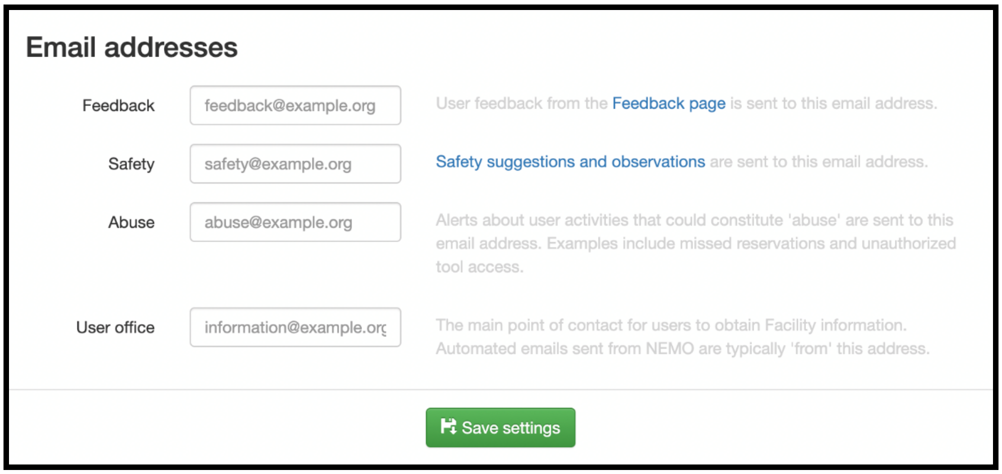


Figure 41.48: *Customization email addresses*

Feedback — emails generated by the send feedback page are sent to this email address. The send feedback feature is described in the send feedback section. The send feedback feature requires both the email address and email template to be configured in the customizations. The feedback email customization is described in the feedback email section below.

Safety — emails generated by the safety page are sent to this email address. The safety page is described in the safety section. Safety email notifications require both the email address and email template to be configured in the customizations. The safety email customization is described in the safety issue email section below.

Abuse — emails generated by either a missed reservation, unauthorized tool login attempt, or tutorial completion are sent to this email address. The missed reservation feature is described in the reservation section. The tool login and rules tutorial features are defined in the tool login rules tutorial sections, respectively. Both the email address and email template must be configured in the customizations. The missed reservation email customization is described in the missed reservation email section below. The unauthorized tool login email customization is described below. The tutorial completion email customization is described below.

User office — all emails initiated by NEMO will be from this email address. For example, reservation reminders, missed reservations, and tool in use reminders. Emails initiated by a user will be from the user that initiated the email. For example, feedback emails, staff canceling a user's reservation, and safety.

41.5 File and email templates

41.5.1 General instructions

Examples of email templates for most features can be found on GitHub in the resources/emails folder.

To upload a file or email template:

- Click the choose file button to open the file selection dialog (Figure 41.49).

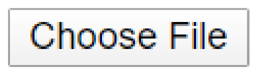


Figure 41.49: *Customization instructions choose file button*

- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload button to load the file.
- The selected file will be renamed and saved in the media folder of the NEMO website.
- Once a file has been uploaded, an option to view or download the file will be shown (Figure 41.50).

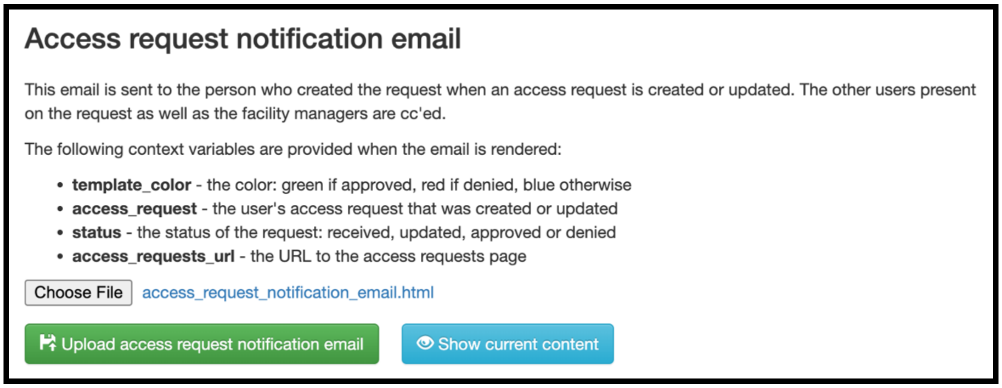


Figure 41.50: *Customization instructions file loaded*

To delete the currently loaded file:

- Click the upload button without selecting a file to remove the current file from the website media folder.
- A warning dialog will appear (Figure 41.51).

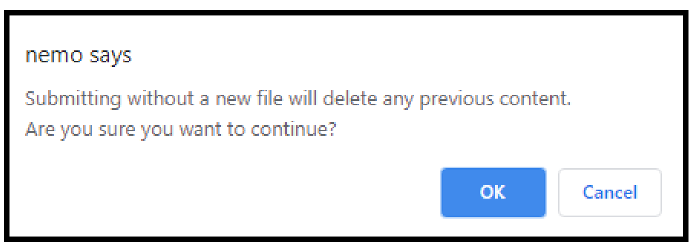


Figure 41.51: *Customization instructions file deletion confirmation*

- Click OK to delete the file or Cancel to leave the file.
- If OK is selected, the filename next to the choose file button will disappear.

To display the contents of the currently loaded file:

- Click the show current content button (Figure 41.52).

Figure 41.52: *Customization instructions show content button*

- The current file content will be displayed in a separate window.

To download the contents of the currently loaded file:

- Click the blue anchor link with the full filename (Figure 41.53).

Figure 41.53: *Customization instructions download link*

- The current file will be downloaded by your web browser

41.5.2 Login banner

The customization for the login banner can be configured using html to display information to users on the login page and is uploaded and viewed through this dialog (Figure 41.54). The login banner is optional, and no default value is displayed if not configured.

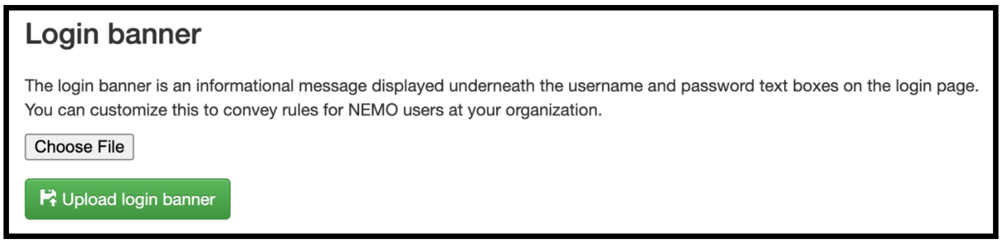


Figure 41.54: *Customization login banner*

To create a custom login banner:

- Use any html editor to create the desired content.
- Example:
  - The html code in Figure 41.55.

```
<H2><center>
Welcome to our lab!
</center></H2>
<H3><center>
If you are having trouble with your user name or password, please see a user office staff member.
</center></H3>
```

Figure 41.55: *Customization login banner html*

  - Will produce the banner in Figure 41.56 on the login page.

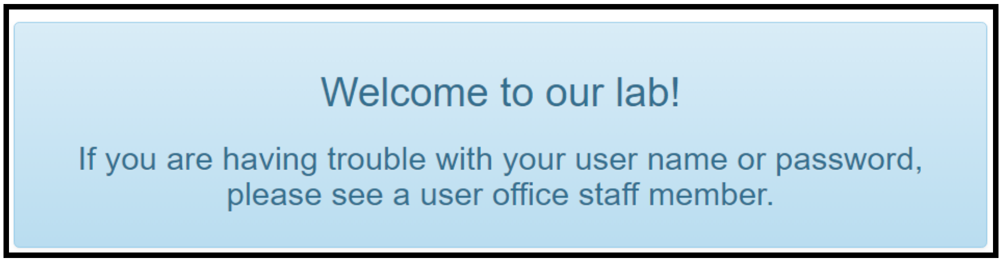


Figure 41.56: *Customization login banner html rendered*

To upload a login banner:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload login banner button to load the file.
- The selected file will be renamed 'login_banner.html' and saved in the media folder of the NEMO website.

41.5.3 Facility failed login page

The customization for the failed login page can be configured using html to display login trouble information to users and is uploaded and viewed through this dialog (Figure 41.57). The failed login configuration is optional, and a default value is displayed if not configured.

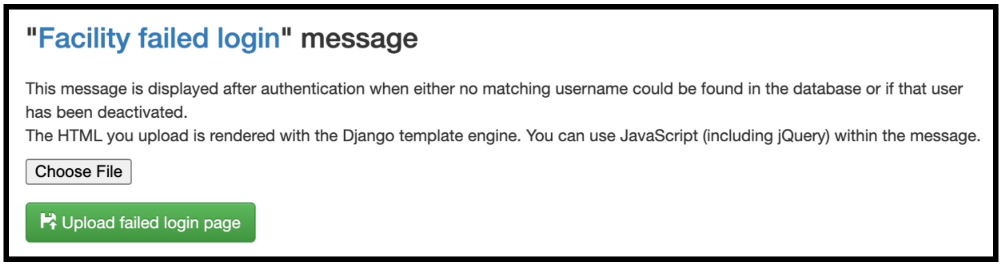


Figure 41.57: *Customization failed login*

To create a custom failed login page:

- Use any html editor to create the desired content.
- Example:
  - The html code in Figure 41.58.

```
<H2><center>
There was a problem logging you in!
</center></H2>
<H3><center>
We cant find you on our list of active users.  If you have used the lab before, your username may
be deactivated for some reason.  Please see a user office staff member.
</center></H3>
```

Figure 41.58: *Customization failed login html*

  - Will produce the failed login page in Figure 41.59.

There was a problem logging you in!

We cant find you on our list of active users. If you have used the lab before, your username may be deactivated for some reason. Please see a user office staff member.

Figure 41.59: *Customization failed login html rendered*

To upload a login banner:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload failed login page button to load the file.
- The selected file will be renamed ‘authorization_failed.html’ and saved in the media folder of the NEMO website.

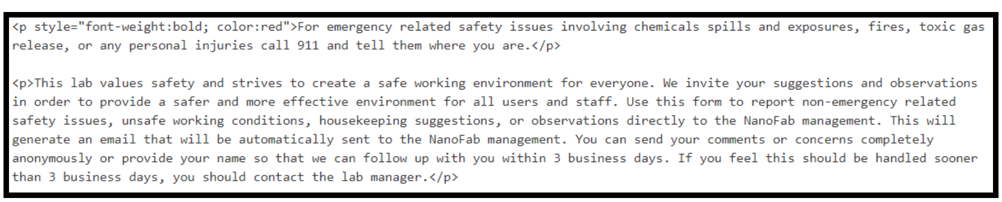
41.5.4 Introduction for Safety suggestions and observations page

39.4.4 Introduction for Safety suggestions and observations page The customization for the introduction for safety suggestions and observations page can be configured using html to display lab specific safety information to users on the safety page and is uploaded and viewed through this dialog (Figure 41.60). The safety introduction is optional, and a default value will be displayed if not configured. More information about the safety page can be found in the safety section.

Figure 41.60: *Customization safety introduction*

To create a custom safety introduction:

- Use any html editor to create the desired content:
- Example:
  - The html in Figure 41.61.



```
<p style="font-weight:bold; color:red">For emergency related safety issues involving chemicals spills and exposures, fires, toxic gas
release, or any personal injuries call 911 and tell them where you are.</p>

<p>This lab values safety and strives to create a safe working environment for everyone. We invite your suggestions and observations
in order to provide a safer and more effective environment for all users and staff. Use this form to report non-emergency related
safety issues, unsafe working conditions, housekeeping suggestions, or observations directly to the NanoFab management. This will
generate an email that will be automatically sent to the NanoFab management. You can send your comments or concerns completely
anonymously or provide your name so that we can follow up with you within 3 business days. If you feel this should be handled sooner
than 3 business days, you should contact the lab manager.</p>
```

Figure 41.61: *Customization safety introduction html*

- Will produce the introduction in Figure 41.62 on the safety page:

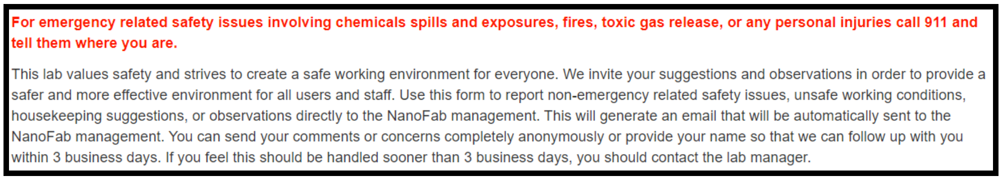


Figure 41.62: *Customization safety introduction html rendered*

To upload a login banner:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload login banner button to load the file.
- The selected file will be renamed 'safety_introduction.html' and saved in the media folder of the NEMO website.
- To view the uploaded content, navigate to the safety page by clicking the link provided (Figure 41.63).

Figure 41.63: *Customization safety introduction page link*

41.5.5 Facility rules tutorial page

The customization for the facility rules tutorial page can be configured using html to display lab specific tutorial information to users and is uploaded and viewed through this dialog (Figure 41.64). The rules tutorial is optional however there is no default content therefore users with training required while no rules tutorial has been configured will require staff to uncheck the users training required status. More information about the rules tutorial can be found in the landing page section 43.27.

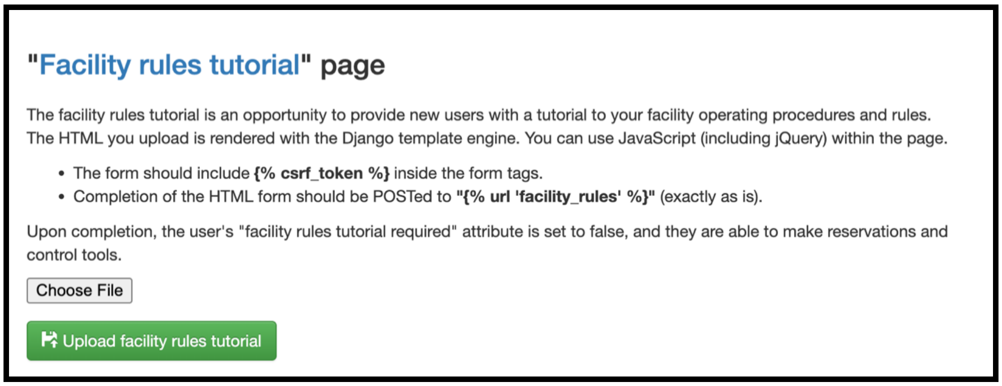


Figure 41.64: *Customization rules tutorial*

The tutorial is triggered by a flag in a user's profile and by default is set to require training upon user creation. NEMO user profiles are discussed in the Users section. A notification is displayed on the landing page and is the user access point for completing the tutorial which is described in the landing page section.

To create a custom rules tutorial.

- Use any html editor to create the desired content.
- The HTML uploaded is rendered with the Django template engine.
- JavaScript (including jQuery) can be used within the page.
- To mark the training as complete, the form must be POSTed to the 'facility_rules' URL to enable the user to make reservations and control tools.
- Example:
  - The html in Figure 41.65.

```
<h1>NanoFab Rules</h1>

<form action="{% url 'facility_rules' %}" method="post">
        {% csrf_token %}

        <div id="introduction">
                <h4>Introduction</h4>
                <p>The NanoFab operates as a shared resource for both internal and exteral users. Please work with other
users to ensure everyone is as productive as possible.</p>
                <p>Don't over reserve tools and if you no longer need a reservation, cancel it as soon as possible.
Please be sure that you log in as soon as you begin using each tool and log out only after the tool is available for the
next user.</p>
                <p><strong>Most important, clean up after yourself</strong></p>
                <button type="button" class="btn btn-success" onclick="$('#introduction').hide();
$('#conclusion').show();window.scrollTo(0,0);">I understand and agree</button>
        </div>

        <div id="conclusion" style="display:none">
                <p>Ultimately, the staff want to make your NanoFab experience as productive and fun as possible. We hope
these rules will make everyone's life better.<br></p>
                <button type="submit" style="white-space: normal" class="btn btn-success">Click here to officially
complete your training</button>
        </div>
</form>
```

Figure 41.65: *Customization rules tutorial html*

– Will produce the tutorial pages shown in Figure 41.66 and Figure 41.67.

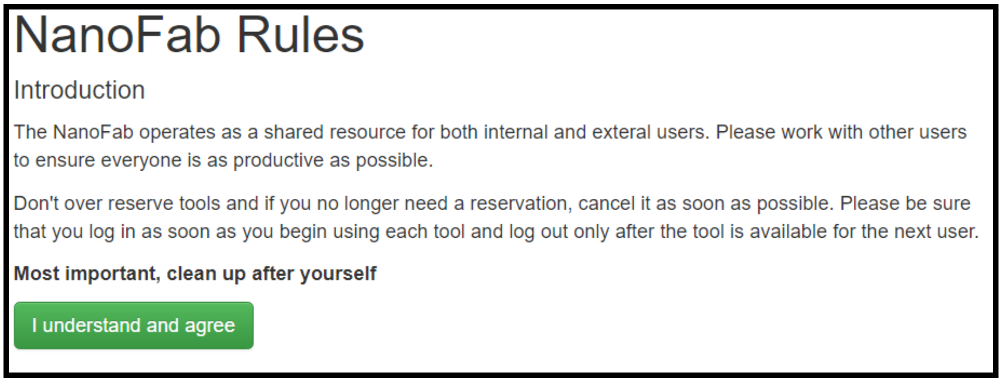


Figure 41.66: *Customization rules tutorial html rendered page 1*

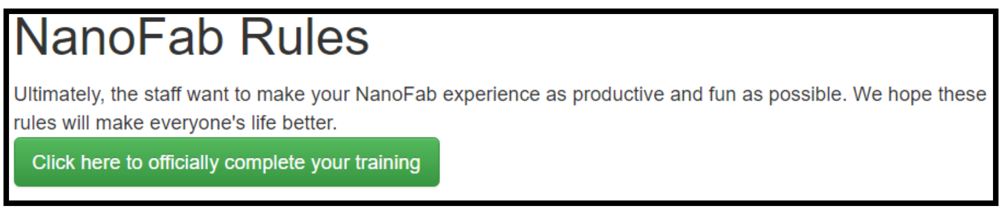


Figure 41.67: *Customization rules tutorial html rendered page 2*

To upload a rules tutorial:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload rules tutorial button to load the file.
- The selected file will be renamed 'facility_rules_tutorial.html' and saved in the media folder of the NEMO website.
- To view the uploaded content, navigate to the safety page by clicking the link provided (Figure 41.68).

Figure 41.68: *Customization rules tutorial page link*

41.5.6 Jumbotron watermark

The customization for the jumbotron watermark can be configured to display a background on the jumbotron page view (Figure 41.69). The jumbotron watermark configuration is optional and a white background is displayed if not configured. More information about the jumbotron page can be found in the jumbotron chapter 9.

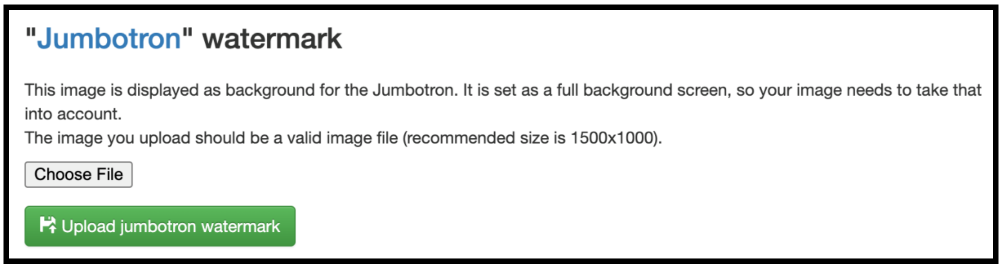


Figure 41.69: *Configuration jumbotron watermark*

To upload a jumbotron watermark:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload button to load the file.
- The selected file will be renamed 'jumbotron_watermark' and saved in the media folder of the NEMO website.
- An example of the jumbotron with watermark background is displayed in Figure 41.70.

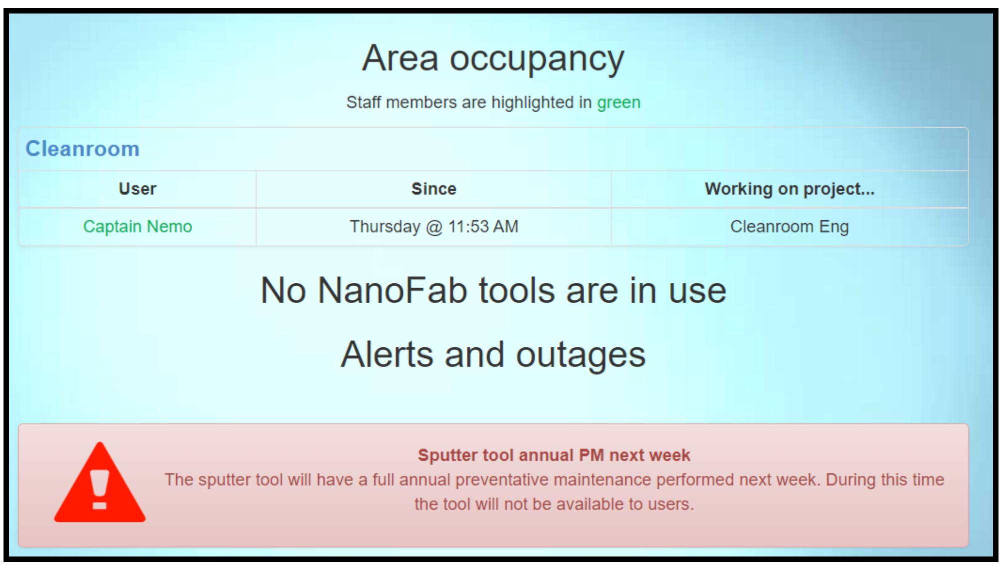


Figure 41.70: *Customization watermark behind jumbotron*

41.5.7 Access request notification email

The customization for the access request notification email template can be configured using html to render a specific message when a user creates or updates an access request, and when a facility manager approves or denies a request (Figure 41.71). Basically, any creation or updates of an access request will trigger this email to be sent. The access requests feature is described in the access requests section 8.2. The access request notification template is optional and if not defined email notifications will not be sent.

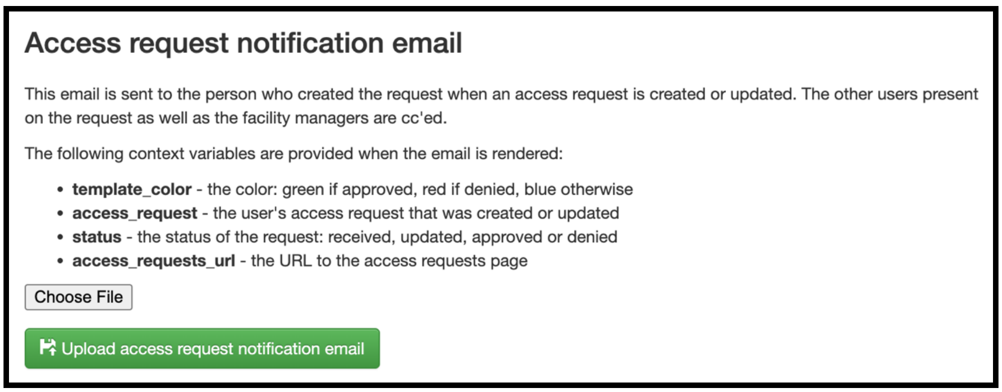


Figure 41.71: *Customization access request notification email*

To create a custom access request email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - template_color – the color to be used in the template, green for an approved request, red for a denied request, and blue otherwise.
  - access_request – the access request that was created or updated
  - status - the request status: received, updated, approved, or denied.

- access_requests_url – the access requests URL.

- The email subject is “Your access request for the <area> has been <re-ceived,updated,approved,denied>”. For example, “Your access request for the Cleanroom has been received”.
- The email will be sent from the user office email.

41.5.8 Adjustment request notification email

The customization for the adjustment request notification email template can be configured using html to render a specific message when a user creates or updates an adjustment request, and when a facility manager approves or denies a request (Figure 41.72). Basically, any creation or updates of an adjustment request will trigger this email to be sent. The adjustment requests feature is described in the adjustment requests section 8.3. The adjustment request notification template is optional and if not defined email notifications will not be sent.

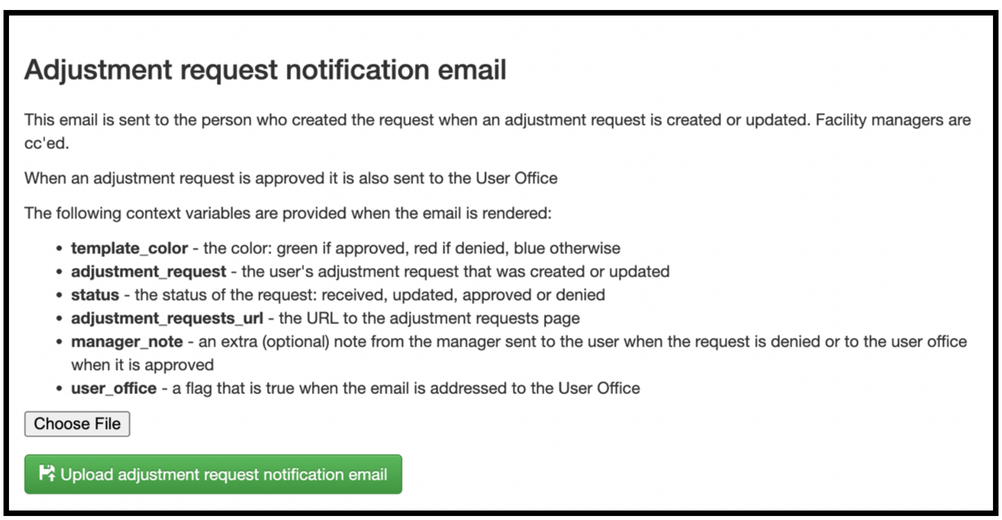


Figure 41.72: *Customization adjustment request notification email*

To create a custom adjustment request email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - template_color – the color to be used in the template, green for an approved request, red for a denied request, and blue otherwise.
  - adjustment_request – the adjustment request that was created or updated.
  - status - the request status: received, updated, approved, or denied.
  - adjustment_requests_url – the adjustment requests URL.
  - manager_note – the optional note from the facility manager, sent to the user if the request is denied, and to the User office if the request is approved.
  - user_office - a flag set to true if the email is the extra email sent to the user office, or false if it's the regular email.
- The email subject is "Your adjustment request for has been <received,updated,approved,denied>". For example, "Your adjustment request has been received".
- The email will be sent from the DEFAULT_FROM_EMAIL set in settings.py or SERVER_EMAIL if the default is not set.

41.5.9 Cancellation email

The customization for the cancellation email template can be configured using html to render a specific message when a staff member cancels a user's reservation (Figure 41.73). The cancel user reservation feature is described in the reservations section 5.4. The cancellation email template is optional and if not defined cancellation emails will not be sent.

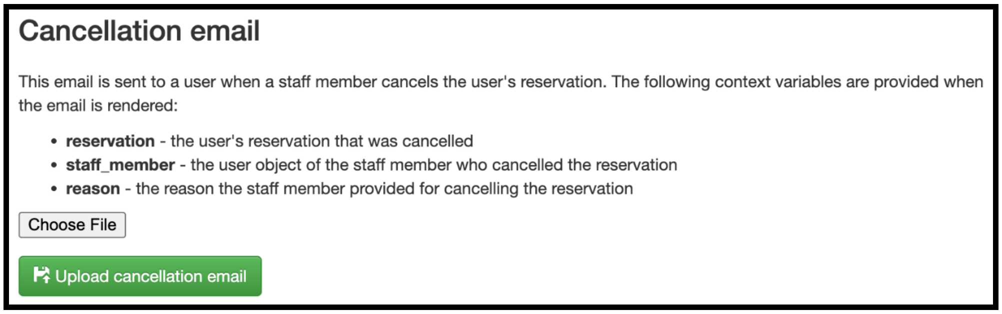


Figure 41.73: *Customization cancellation email*

To create a custom cancellation email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the reservation object of the canceled reservation.
  - staff_member – the user object of the staff member who canceled the reservation.
  - reason – the reason the staff member provided for canceling the reservation.
- The email subject is always, "Your reservation was canceled".
- The email will be from the staff member that canceled the reservation.

41.5.10 Counter threshold reached email

The customization for the counter threshold reached template can be configured using html to render a specific message when the warning threshold value for a tool usage counter is reached (Figure 41.74). The counter threshold reached email template is optional and if not defined the emails will not be sent.

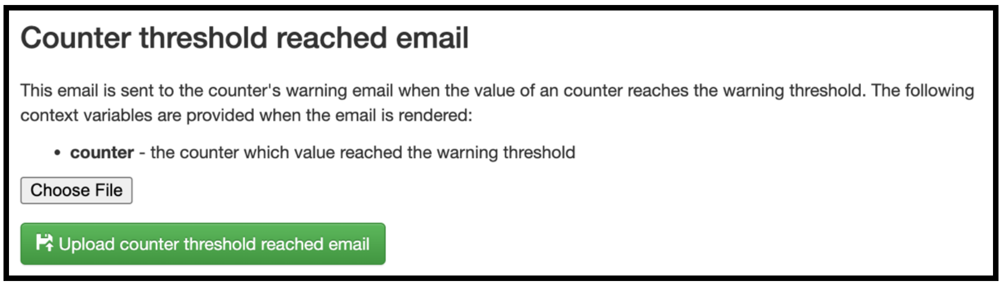


Figure 41.74: *Customization counter threshold reached email*

To create a custom counter threshold reached email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - counter – the tool usage counter which value reached the warning threshold
  - The email subject is always, "Warning threshold reached for tool.name counter.name counter".
- The email will be sent from the user office.

41.5.11 Facility rules tutorial email

The customization for the Facility rules tutorial email template can be configured using html to render a specific message to staff when a user completes the tutorial (Figure 41.75). The rules tutorial feature is described in the landing page section 43.27. The rules tutorial email is optional and will only be sent if the email template is configured. The rules tutorial email requires the email template and the abuse email address, or the email will not be sent.

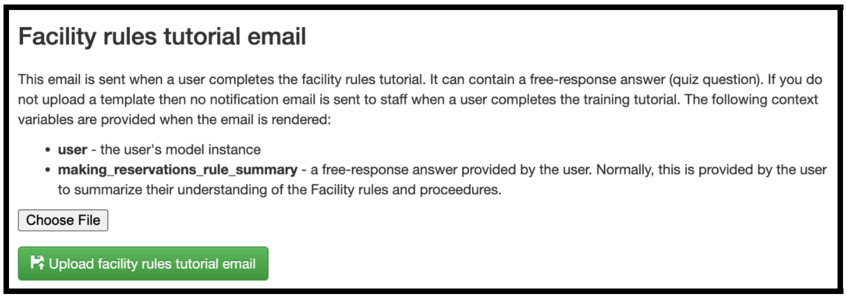


Figure 41.75: *Customization rules tutorial email*

To create a custom rules tutorial email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user object of the user who completed the tutorial.
  - making_reservations_rule_summary – a free response answer that can be passed from the rules tutorial to the email.
- The email subject is always “<Facility Name> rules tutorial”.
- The email will be from the abuse email defined in the email addresses section above.
- The email will be addressed to the abuse email address.

41.5.12 Feedback email

The customization for the feedback email template can be configured using html to render a specific message when a user fills out the feedback form (Figure 41.76). The send feedback feature is described in the send feedback chapter 14. The feedback feature requires both the feedback email template and feedback email address customizations or emails will not be sent. The feedback email address customization is described in the email addresses section 41.4 above.

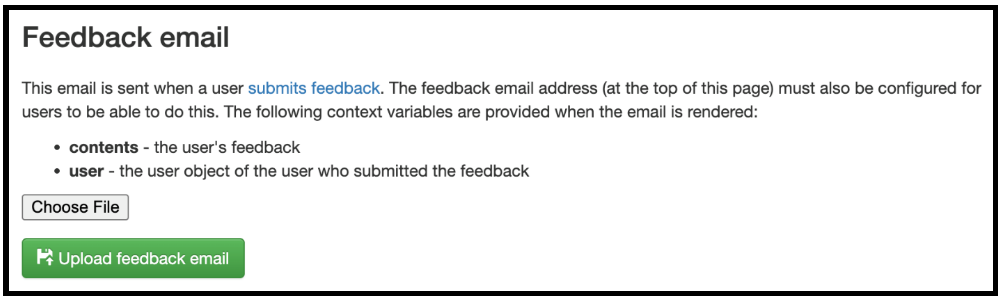


Figure 41.76: *Customization feedback email*

To create a custom feedback email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - contents – the user's feedback.
  - user – the user object of the user who submitted feedback
- The email subject is always, "feedback from username".
- The email will be from the user leaving feedback.

41.5.13 Generic email

The customization for the generic email template can be configured using html to render a specific message when a staff member fills out the email form (Figure 41.77). The email feature is described in the email addresses section 41.4. The email feature requires the generic email template or emails will not be sent.

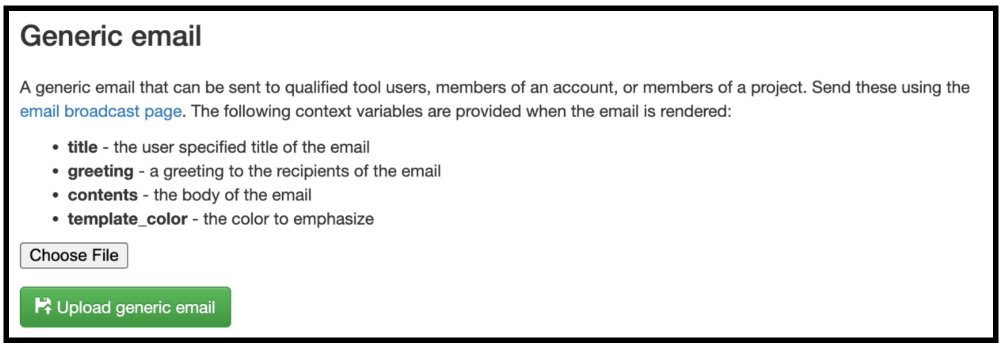


Figure 41.77: *Customization generic email*

To create a custom generic email template

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - title – the user specified title of the email.
  - greeting – a greeting to the recipients of the email.
  - contents – the body of the email.
  - template_color – the title color to emphasize.
- The email subject is the subject entered on the email feature page.
- The email will be from the user creating the email.

41.5.14 Missed reservation email

The customization for the missed reservation email template can be configured using html to render a specific message when a user misses a reservation (Figure 41.78). The missed reservation feature is described in the reservation section 5.4. The missed reservation feature requires the missed reservation email template and the abuse email address, or the email will not be sent.

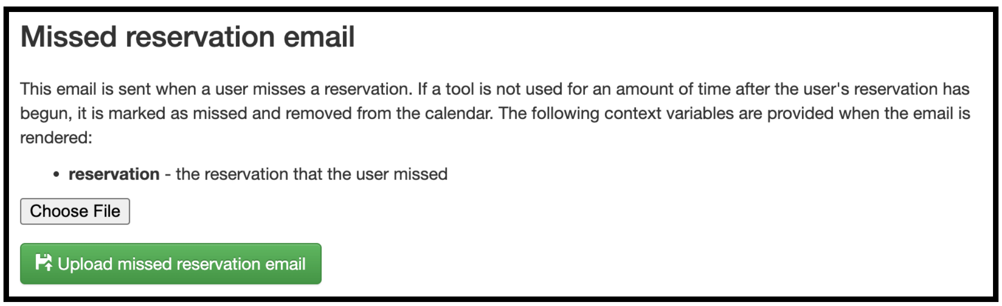


Figure 41.78: *Customization missed reservation email*

To create a custom missed reservation email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the reservation object of the missed reservation.
- The email subject is always “Missed reservation for the reservation.tool.
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the user that missed the reservation, the abuse email address, and the user office email address.

41.5.15 New task email

The customization for the new task email template can be configured using html to render a specific message to users and staff when a task is created (Figure 41.79). The task feature is described in the tool control section. The new task email is optional and will only be sent if the email template is configured.

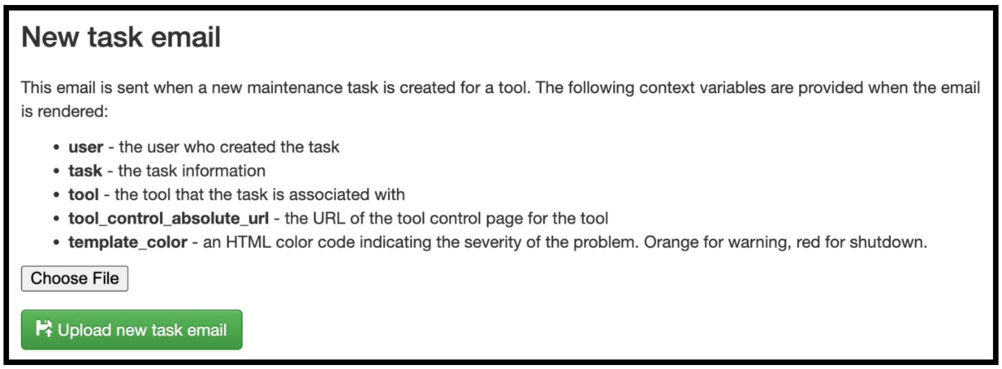


Figure 41.79: *Customization new task email*

To create a custom rules tutorial email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user object of the user who created the task.
  - task – the task object information.
  - tool – the tool object that the task is associated with.
  - tool_control_absolute_url – the URL of the tool control page for the tool.
  - template_color – an HTML color code indicating the severity of the problem. Orange for warning, red for shutdown.

- The email subject will identify the tool name, if the task is a safety hazard, and if the task is defined as a problem or shutdown.
- The email will be from the user reporting or updating the task.
- The email will be addressed to the tool primary owner, backup owners, notification email defined in the tool table, and lab managers if defined in the settings.py file.

41.5.16 Out of time reservation email

The customization for the out of time reservation email template can be configured using html to render a specific message to users when a user is still logged in an area that requires reservations to access, but their reservation has expired (Figure 41.80). A grace period can be set when configuring the area that will delay the email.

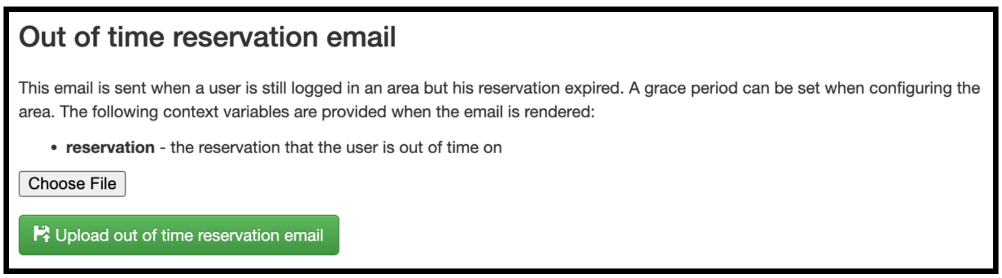


Figure 41.80: *Customization out of time reservation email*

- To create a custom out of time reservation email template.
- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the user's upcoming reservation object.
- The email subject will always be "Out of time in the area".
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the user with the reservation and any users defined in the abuse email of the area table.

41.5.17 Recurring charges reminder email

The customization for the recurring charges reminder email template can be configured using html to render a specific message to users a certain number of days before they are to be charged for recurring consumable charges (Figure 41.81).

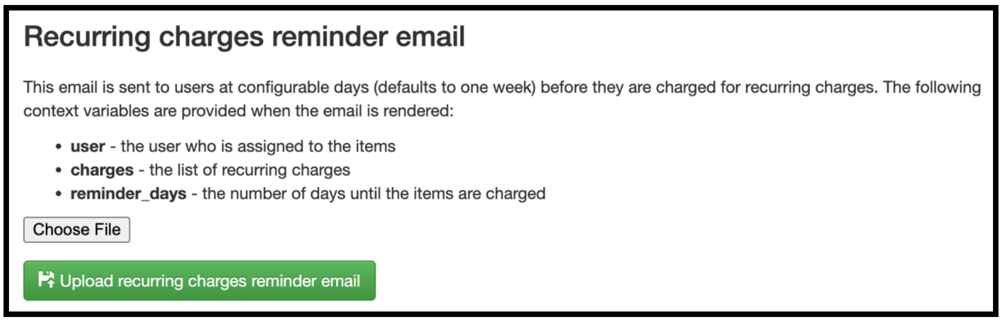


Figure 41.81: *Customization recurring charges reminder email*

To create a recurring charges reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user who is about to be charged.
  - charges – a list of recurring charges due on the same date.
  - reminder_days – the number of days until the charges will be billed.
- The email subject will always be “Recurring charges will be charged in reminder_days day(s)”.
- The email will be from the user office email defined in the email addresses section.
- The email will be addressed to the user.

41.5.18 Reorder supplies reminder email

Reorder supplies reminder The customization for the reorder supplies reminder email template can be configured using html to render a specific message to the supply owner when the supply stock drops below the minimum (Figure 41.82).

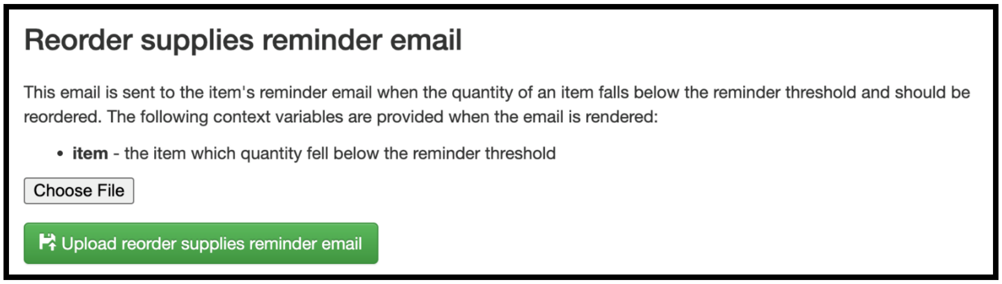


Figure 41.82: *Customization reorder supplies reminder email*

To create a custom reorder supplies reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - item – the item (consumable) object which quantity fell below the reminder threshold.
- The email subject will always be "Time to order more consumable.name".
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the email set on the Consumable table.

41.5.19 Reservation ending reminder email

The customization for the reservation ending reminder email template can be configured using html to render a specific message to users when a user is logged in an area and their reservation in that area is about to end (Figure 41.83). The reservation ending reminder email is optional and will only be sent if the reservation ending reminder email template is configured.

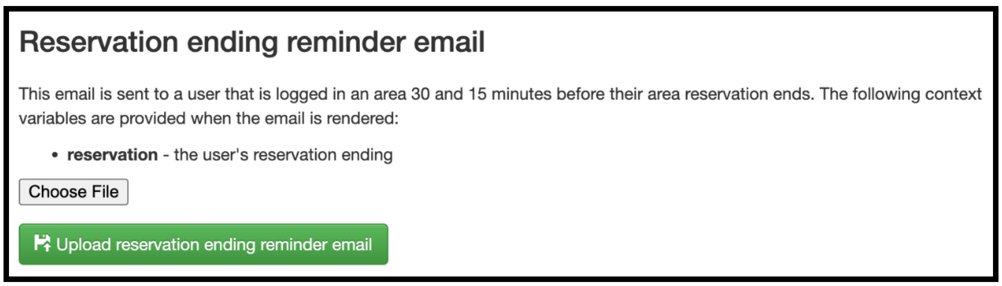


Figure 41.83: *Customization reservation ending reminder email*

To create a custom reservation ending reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the user's ending reservation object.
- The email subject will always be "area name reservation ending soon".
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the user with the reservation.

41.5.20 Reservation reminder email

The customization for the reservation reminder email template can be configured using html to render a specific message to users when a reservation is approaching (Figure 41.84). The reservation reminder feature is described in the reservation section 5.4. The reservation reminder email is optional and will only be sent if both the reservation reminder email template and the reservation warning email template are configured. The reservation warning email template is described below.

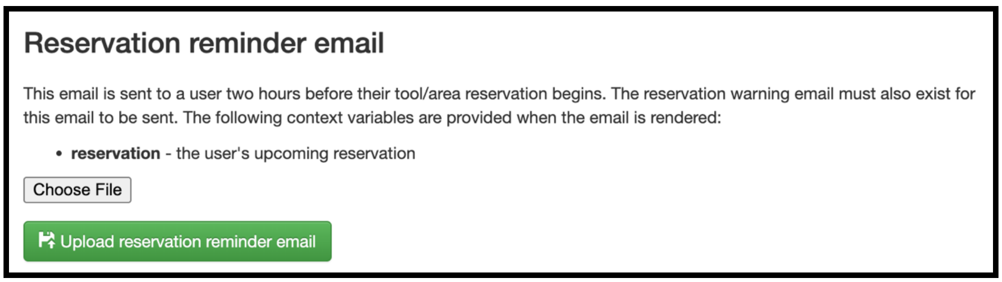


Figure 41.84: *Customization reservation reminder email*

To create a custom reservation reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the user's upcoming reservation object.
- The email subject will always be "tool name reservation reminder".
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the user with the reservation.

41.5.21 Reservation warning email

The customization for the reservation warning email template can be configured using html to render a specific message to users when a reservation is approaching and there is a problem with the tool they reserved (Figure 41.85). The reservation warning feature is described in the reservation section 5.4. The reservation warning email is optional and will only be sent if both the reservation reminder email template and the reservation warning email template are configured. The reservation reminder email template is described above.

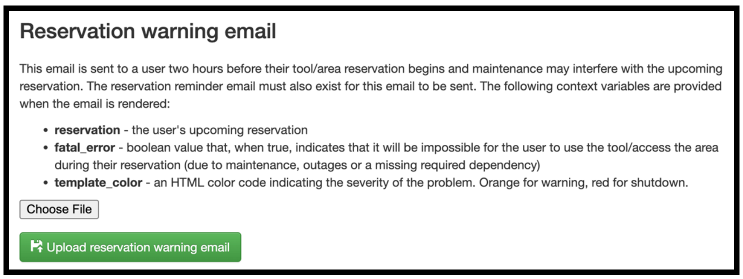


Figure 41.85: *Customization reservation warning email*

To create a custom reservation warning email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the user's upcoming reservation object.
  - fatal_error – when true, indicates that the tool is shutdown.
- The email subject will always be "tool name reservation problem".
- The email will be from the user office email defined in the email addresses section above.
- The email will be addressed to the user with the reservation.

41.5.22 Safety issue email

The customization for the safety email template can be configured using html to render a specific message to users when a safety issue has been created (Figure 41.86). The safety issue feature is described in chapter 11. The safety email is optional and will only be sent if both the safety email template and the safety email address are configured. The safety email address is defined in the email addresses section above.

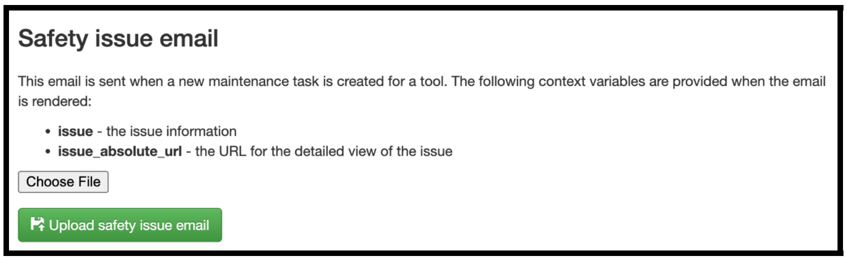


Figure 41.86: *Customization safety email*

To create a custom safety email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - issue – the issue object.
  - issue_absolute_url – the URL to the detailed view of the issue.
- The email subject will always be “Safety issue”.
- The email will be from the user reporting the safety issue unless the report is anonymous then the email will be from the safety email address defined in the email addresses section above.
- The email will be addressed to the safety email address defined in the email addresses section above.

41.5.23 Scheduled outage reminder email

The customization for the scheduled outage reminder email template can be configured using html to render a specific message to a set of email addresses before a scheduled outage is set to start. (Figure 41.87).

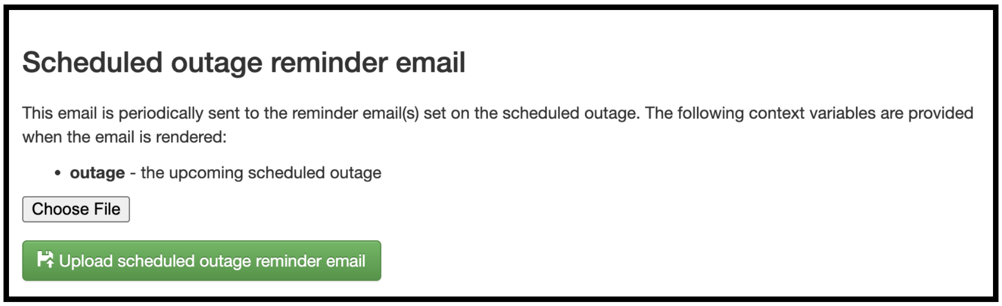


Figure 41.87: *Customization scheduled outage reminder email*

To create a custom scheduled outage reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - outage – the upcoming scheduled outage.
- The email subject will always be "outage.title reminder".
- The email will be from the DEFAULT_FROM_EMAIL address set in settings.py.
- The email will be addressed to the list of email addresses set on the outage itself.

41.5.24 Staff charge reminder email

The customization for the staff charge email template can be configured using html to render a specific message to staff as a reminder they are currently charging a user (Figure 41.88). The staff charge feature is described in the staff charge section 32.1. The staff charge email is optional and will only be sent if the email template is configured.

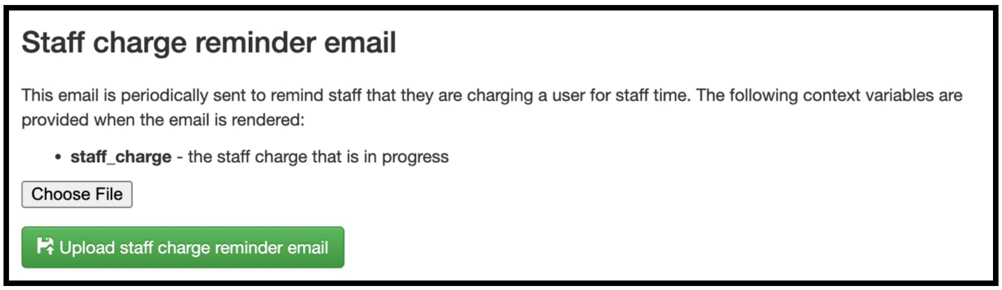


Figure 41.88: *Customization staff charge email*

To create a custom staff charge email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - staff_charge – the staff charge object.
- The email subject will always be “Active staff charge since staff_charge.start”.
- The email will be from the user office email address defined in the email addresses section above.
- The email will be addressed to the staff member currently charging.

41.5.25 Task status notification email

The customization for the task status notification email template can be configured using html to render a specific message to staff when the status of a task is changed (Figure 41.79). The task status feature is described in the tool control chapter 6. The task status email is optional and will only be sent if the email template is configured.

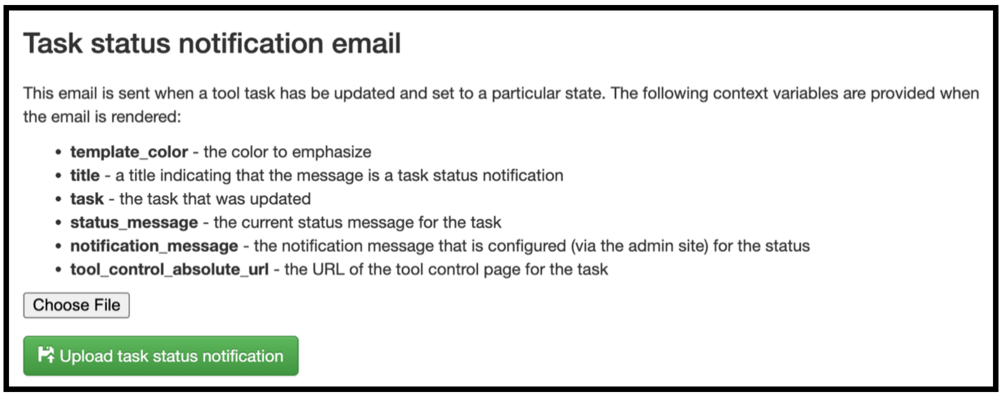


Figure 41.89: *Customization new task email*

To create a custom task status email template

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - template_color – an HTML color code indicating the title background color.
  - title – a title indicating the message is a task status notification.
  - task – the task object that was updated.
  - status_message – the current status message for the task.

- notification_message – the notification message that is configured (via the admin site) for the status.
- tool_control_absolute_url – the URL of the tool control page for the task.

- The email subject will always be "tool.name task notification".
- The email will be from the user updating the task status.
- The email will be addressed to the tool primary owner, backup owners, and/or notification emails defined in the tool table, if selected in the task status table.

41.5.26 Tool qualification expiration email

The customization for the tool qualification expiration email template can be configured using html to render a specific message to users when they are about to lose access to a tool (Figure 41.90).

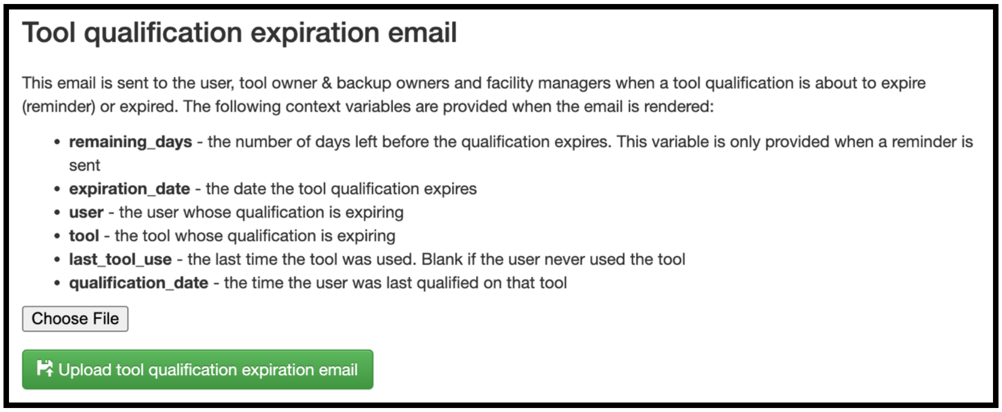


Figure 41.90: *Customization tool qualification expiration email*

To create a tool qualification expiration email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - remaining_days – the number of days until the tool access expires. Only present if the email is a reminder.
  - expiration_date – the date the tool qualification expires.
  - user – the user whose tool access is expiring.
  - tool – the tool the user is about to lose access to.
  - last_tool_use – the last time the tool was used, or blank if the user never used it.

   - qualification_date – the date the user was last qualified on the tool.

- The email subject will either be “Your tool.name qualification expires in remaining_days days” or “You tool.name qualification has expired”.
- The email will be from the user office email address.
- The email will be addressed to the user and cc’d to any email address set in Customization → Tool qualification.

41.5.27 Tool required unanswered questions email

The customization for the tool required unanswered questions email template can be configured using html to send a specific message to users when they are logged out of a tool without having answered required post usage questions (Figure 41.91).

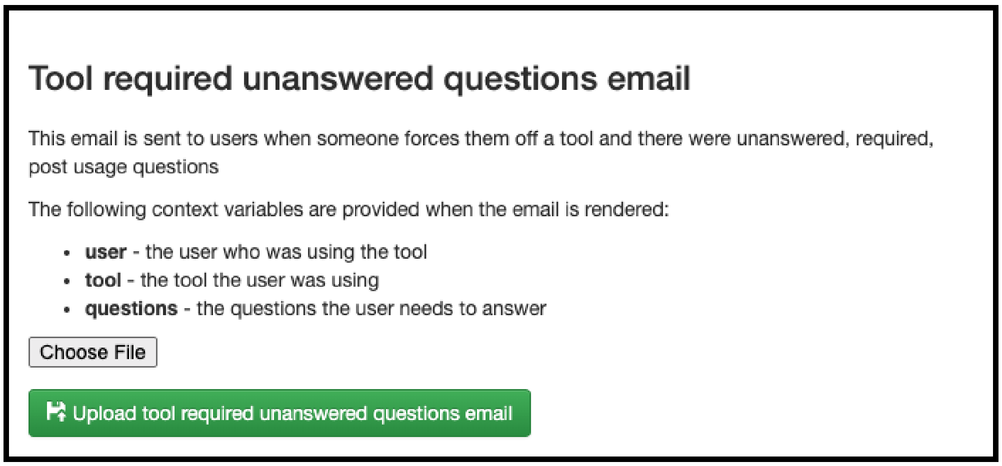


Figure 41.91: *Customization tool required unanswered questions email*

To create a tool required unanswered questions email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user who was using the tool.
  - tool – the tool the user was using.
  - questions – the questions the user needs to answer.
- The email subject will be "Unanswered post-usage questions after logoff from the tool.name".

- The email will be from the user office email address.
- The email will be addressed to the user and cc'd to the staff member who forced the user off the tool, the primary owner of the tool, facility managers as well as the abuse email address.

41.5.28 Tool wait list notification email

The customization for the tool wait list notification email template can be configured using html to render a specific message to users when it's their turn to use a tool they have been on the waitlist for (Figure 41.92).

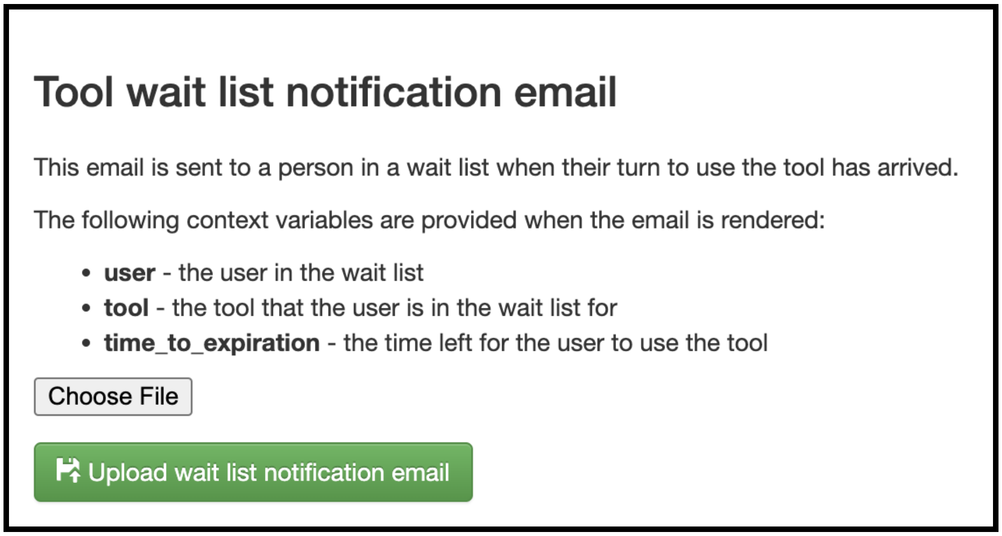


Figure 41.92: *Customization tool waitlist notification email*

To create a tool waitlist notification email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user in the wait list.
  - tool – the tool that the user is in the wait list for.
  - time_to_expiration – the time left for the user to use the tool.
- The email subject will either be "Your turn for the tool.name".

- The email will be from the DEFAULT_FROM_EMAIL address set in settings.py.
- The email will be addressed to the user whose turn it is to use the tool.

41.5.29 Unauthorized tool access email

The customization for the unauthorized tool access email template can be configured using html to render a specific message to staff when a user tries to log into a tool that is in an area the user is not currently logged into (Figure 41.93). The unauthorized tool access feature is described in the tool control chapter 6. The unauthorized tool access email is optional and will only be sent if the email template and the abuse email address described is configured.

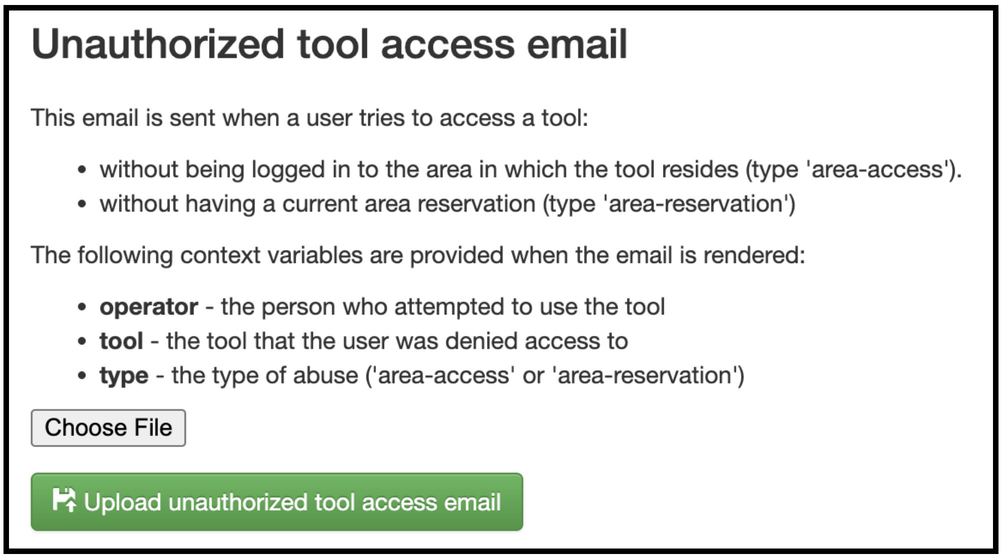


Figure 41.93: *Customization unauthorized tool access email*

To create a custom unauthorized tool access email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - operator – the person who attempted to enable the tool.
  - tool – the tool object of the tool the user was denied access to.

  - type – the type of abuse (“area-access” or “area-reservation”).

- The email subject will always be “Area access requirement”.
- The email will be from the abuse email address.
- The email will be addressed to the abuse email address.

41.5.30 Usage reminder email

The customization for the usage reminder email template can be configured using html to render a specific message to users periodically when they are logged into areas or tools (Figure 41.94). The usage reminder feature is described in the tool control section. The usage reminder email is optional and will only be sent if the email template and the abuse email address is configured.

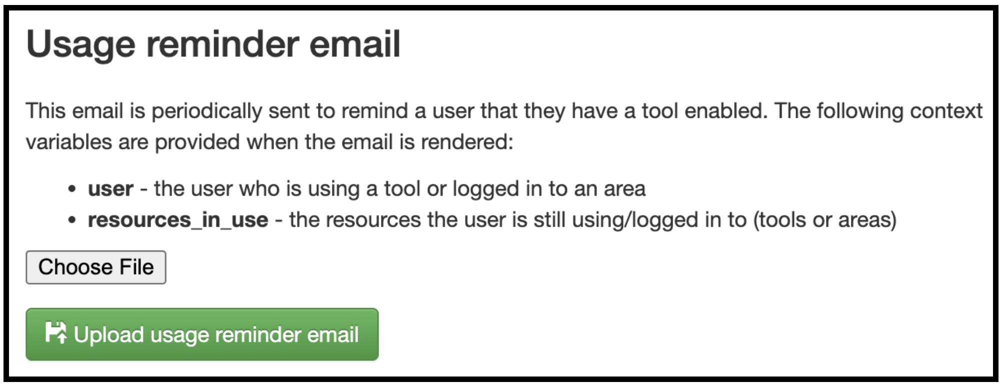


Figure 41.94: *Customization usage reminder email*

To create a custom usage reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user object who is using a tool or logged in to an area.
  - resources_in_use – a list of resources the user is currently using.
- The email subject will always be “facility name usage”.
- The email will be from the user office email address.
- The email will be addressed to the user.

41.5.31 User access expiration reminder email

The customization for the user access expiration reminder email template can be configured using html to render a specific message to users a certain number of days before their access expires (Figure 41.95). The user access expiration feature is described in the Customization → User → Access expiration reminder subsection 41.16.2. The user access expiration reminder email is optional and will only be sent if the email template, the number of days and the user office email address are all configured.

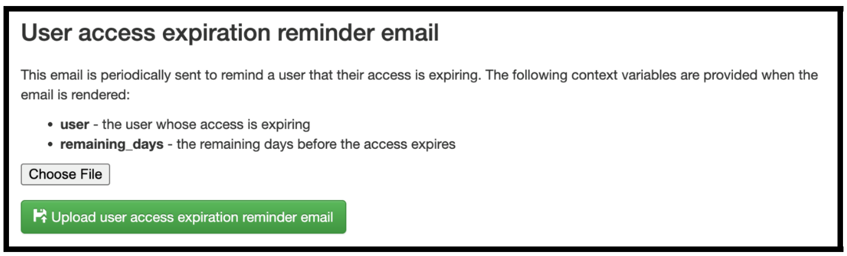


Figure 41.95: *Customization user access expiration reminder email*

To create a custom user access expiration reminder email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - user – the user object whose access is expiring.
  - remaining_days – the remaining days before the user's access expires.
- The email subject will always be "Your facility_name access expires in remaining_days days (format_datetime(user.access_expiration))".
- The email will be from the user office email address.
- The email will be addressed to the user.

41.5.32 User reservation cancelled email

The customization for the user reservation canceled email template can be configured using html to render a specific message to users when they cancel a reservation that provides a calendar invite for common mail interfaces such as Outlook or Gmail as an attachment (Figure 41.96). The feature is described in the user preference section. The user reservation canceled email is optional and will only be sent if the email template and the user office email address described are configured and the user has enabled the feature in their user preferences.

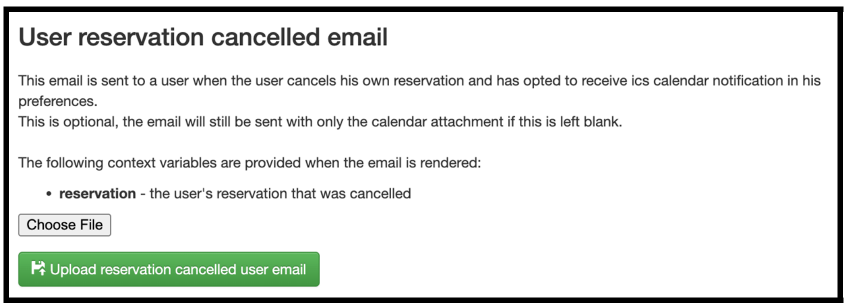


Figure 41.96: *Customization user reservation canceled email*

To create a custom user reservation cancelled email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the reservation object of the user's reservation.
- The email subject will always be "facility_name Reservation for the tool_name".
- The email will be from the user office email address.
- The email will be addressed to the user.

41.5.33 User reservation created email

The customization for the user reservation created email template can be configured using html to render a specific message to users when they create a reservation that provides a calendar invite for common mail interfaces such as Outlook or Gmail as an attachment (Figure 41.97). The feature is described in the user preference chapter 19. The user reservation created email is optional and will only be sent if the email template and the user office email address are configured and the user has enabled the feature in their user preferences.

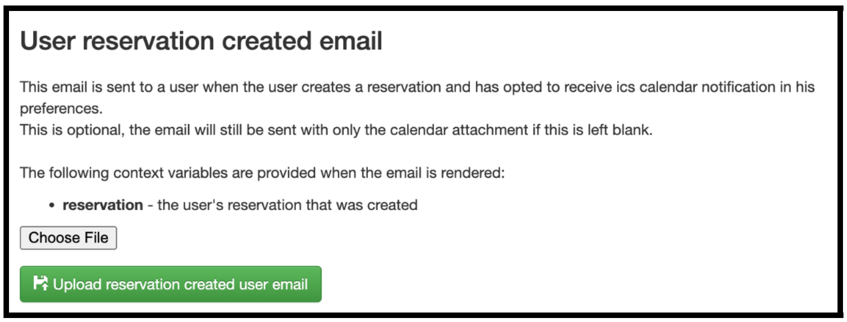


Figure 41.97: *Customization user reservation created email*

To create a custom user reservation created email template:

- Use any html editor to create the desired content.
- Context variables available. The fields of an object can be found in the objects model in the models.py file.
  - reservation – the reservation object of the users reservation.
- The email subject will always be “facility_name Reservation for the tool_name”.
- The email will be from the user office email address.
- The email will be addressed to the user.

41.5.34 Weekend access notification email

The customization for the weekend access notification email template can be configured using html to render a specific message to be sent to the weekend access emails provided in User request settings. The weekend access notification email is optional and will only be sent if the email template and the user office email address are configured (Figure 41.98).

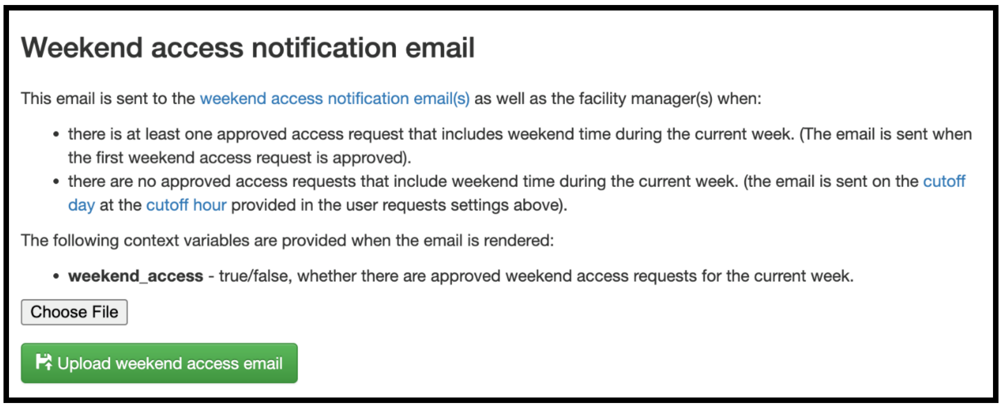


Figure 41.98: *Customization weekend access notification email*

To create a custom weekend access email template: Use any html editor to create the desired content Context variables available. The fields of an object can be found in the objects model in the models.py file. weekend_access – a Boolean (true/false) value representing whether there will be weekend access. The email subject will always be either “Weekend access for the facility_name saturday_date – sunday_date” The email will be from the user office email address The email will be addressed to the email(s) set in User request settings as well and all facility managers.

41.6 Interlock

The Interlock settings can be used to display a custom message when an interlock command fails. Interlocks can be used for both doors and tools, and you can customize the message for each (Figure 41.99).

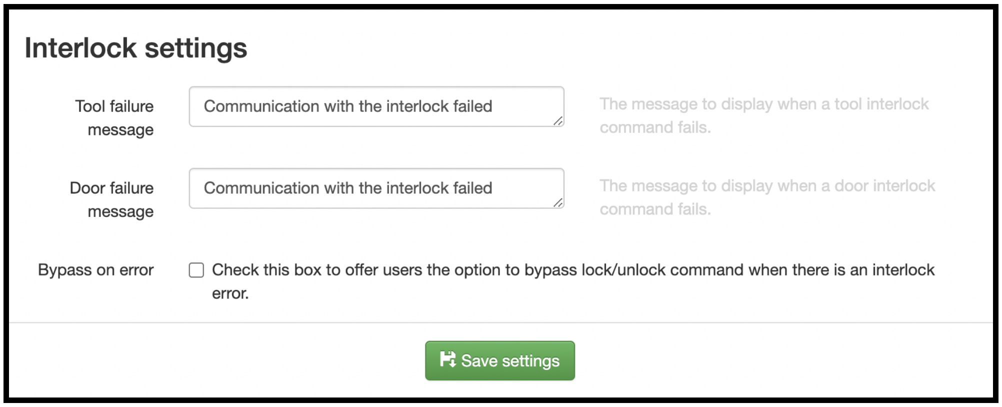


Figure 41.99: *Interlock settings*

- The default message for tool interlock failure is "Communication with the interlock failed". To edit, click in the dialog box and enter the desired message (Figure 41.100). Note that carriage returns will be displayed to ease visual organization of information.

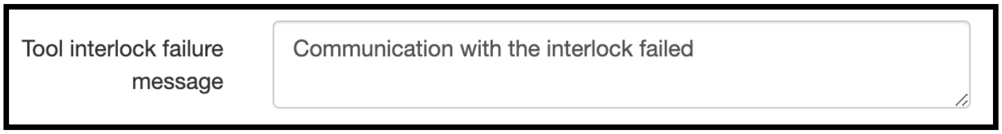


Figure 41.100: *Interlock settings tool failure message*

- The default message for door interlock failure is “Communication with the interlock failed”. To edit, click in the dialog box and enter the desired message (Figure 41.101). Note that carriage returns will be displayed to ease visual organization of information.

Figure 41.101: *Interlock settings door failure message*

- Additionally, you can enable an option for users to bypass the interlock error by clicking the checkbox (Figure 41.102), meaning they can still enable/disable a tool or enter a billable area in NEMO.
  In reality this means that if interlock commands fail but tools or doors can be manually enabled by staff, the user can select that option to have NEMO keep track of time as it otherwise would.

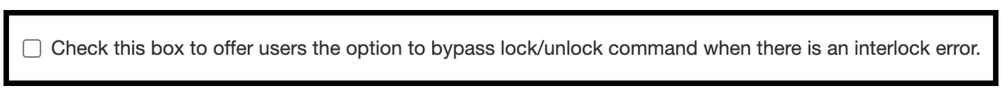


Figure 41.102: *Interlock settings bypass*

41.7 Knowledge base

The Knowledge base settings can be used to control the display of the user and staff knowledge base. (Figure 41.103).

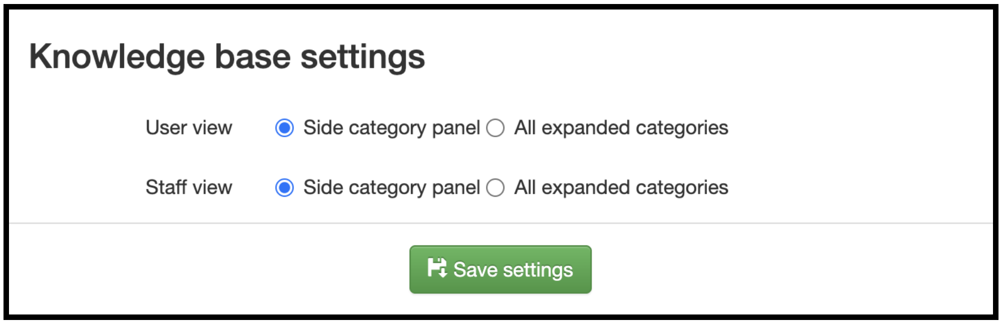


Figure 41.103: *Customization knowledge base settings*

- The user knowledge base item view can be customized between the side category panel (default) and an all-expanded version (Figure 41.104).

Figure 41.104: *Knowledge base settings user items view*

- The staff knowledge base item view can be customized between the side category panel (default) and an all-expanded version (Figure 41.105).

Figure 41.105: *Knowledge base settings staff items view*

41.8 Projects and accounts

The Projects and accounts settings can be used to control the display of the account list and project selection, and to enable project document upload (Figure 41.106).

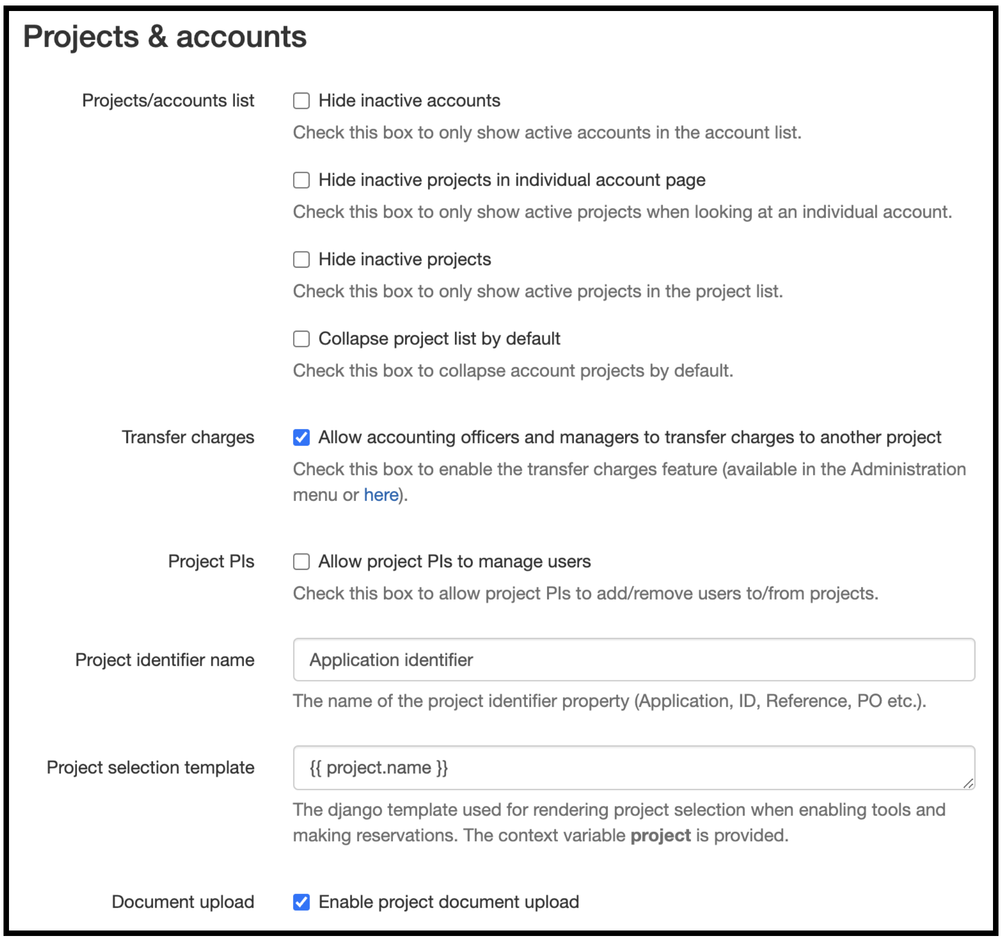


Figure 41.106: *Customization projects and accounts settings*

- By default, inactive accounts are shown in the accounts and projects list. To hide them, check the “Hide inactive accounts” box (Figure 41.107).

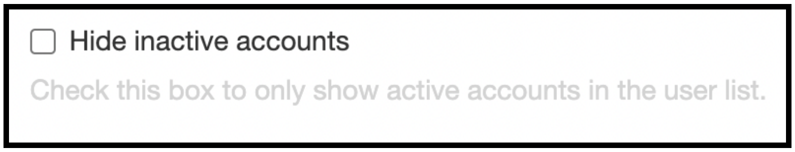


Figure 41.107: *Projects and accounts settings hide inactive accounts*

- By default, inactive projects are shown when looking at a specific account’s page. To hide them, check the “Hide inactive projects in individual account page” box (Figure 41.108).

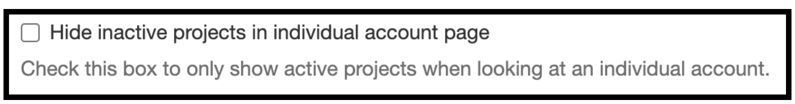


Figure 41.108: *Projects and accounts settings hide inactive projects in account*

- By default, inactive projects are shown in the accounts and projects list. To hide them, check the “Hide inactive accounts” box (Figure 41.109).

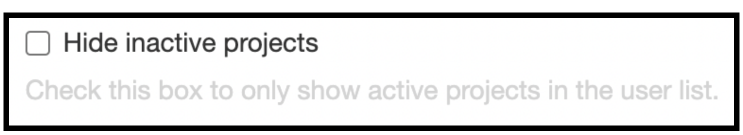


Figure 41.109: *Projects and accounts settings hide inactive projects*

- By default, the project list is expanded. To have it collapsed instead, check the “Collapse project list by default” box (Figure 41.110).

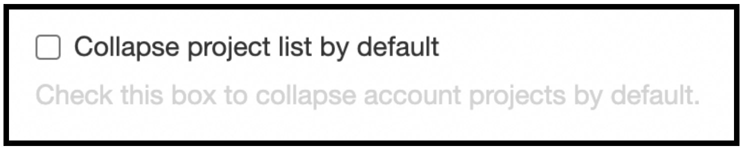


Figure 41.110: *Projects and accounts settings collapse project list*

- To allow accounting officers and facility managers to transfer charges from one project to another, check the “Allow accounting officers and managers to transfer charges to another project” box (Figure 41.111). Transfer charges are discussed in chapter refch:TransferChargesAccountingManagersOnly.

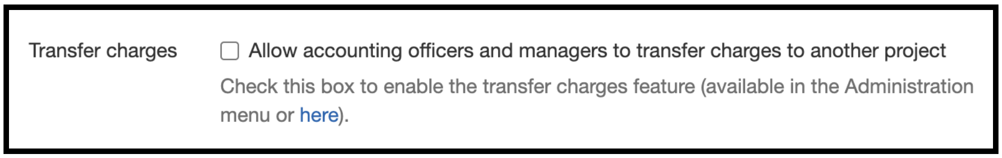


Figure 41.111: *Projects and accounts settings enable charges transfer*

- To allow project PIs to manage their users (add/remove), check the “Allow project PIs to manager users” box (Figure 41.112).

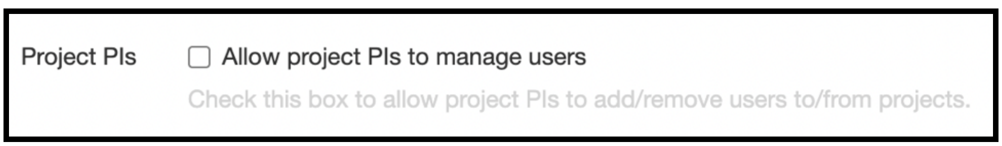


Figure 41.112: *Projects and accounts settings PIs manage users*

- The name of the project identifier field can be customized. This can be useful to keep consistent with your facility’s convention (Project ID, PO, Reference # etc.) (Figure 41.113).

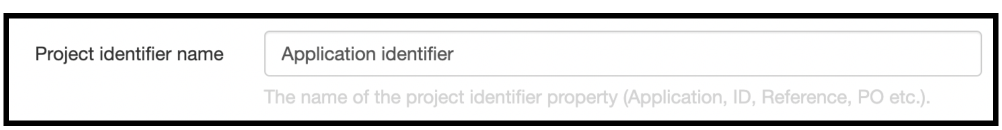


Figure 41.113: *Projects and accounts settings application number*

- Customizing the project selection template allows for custom project information to be displayed when users are selecting a project to associate a reservation/usage with.
  The default project selection template is “ project.name ”. To edit, click in the dialog box and enter the desired message (Figure 41.114). The syntax follows Django templating engine. Conditions and other tags can be used.
  For example, entering “ project.account.name – project.name ” will result in the account name followed by the project name to be displayed when users need to select a project to associate with a reservation, usage etc. Note that carriage returns will be displayed to ease visual organization of information.

Figure 41.114: *Projects and accounts settings project selection template*

- By default, uploading documents to projects is disabled. To enable it, check the “Enable project document upload” box (Figure 41.115).

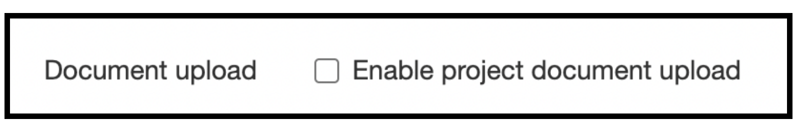


Figure 41.115: *Projects and accounts settings enable project document upload*

41.9 Rates

The customization for the tool rates can be configured to display rates for tools and supplies (Figure 41.116). The tool rate configuration is optional, and no rate information will be displayed if not configured. More information about how the tool rates are displayed can be found in the tool control chapter. More information about how supply rates are displayed can be found in the supply chapter 35. NEMO comes with a default rate class defined which can be edited to suit your institution by modifying the rates.py file to create a custom rate class. NOTE: It is beyond the scope of this manual to provide details of programming changes.

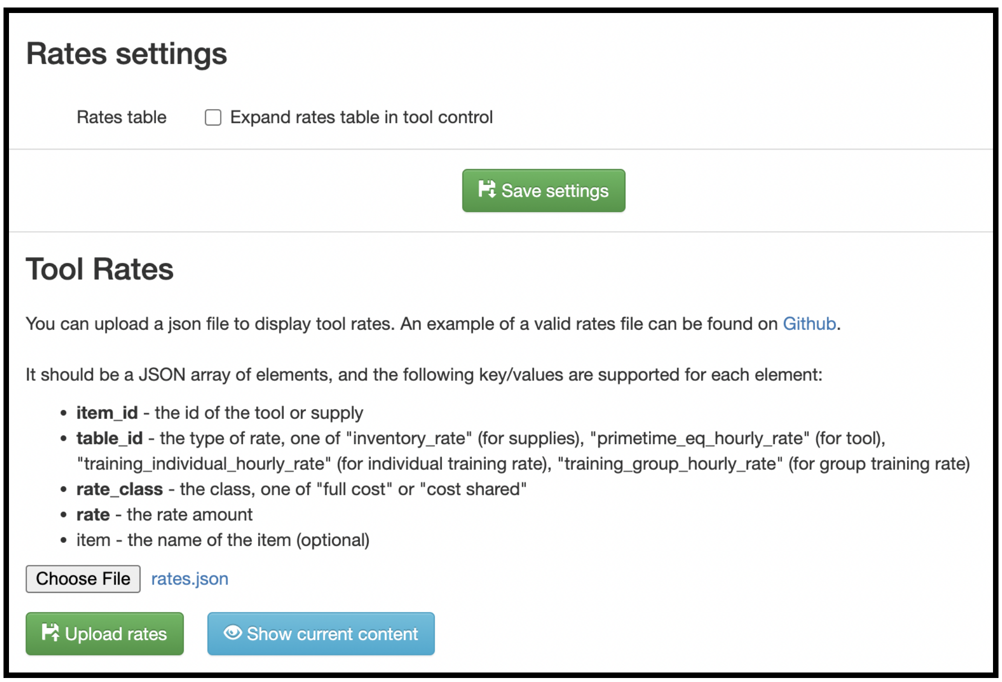


Figure 41.116: *Configuration tool rates*

To create a custom tool rate file for the default rate class:

- Use any editor to create the desired json array of elements.
- The following key/values are supported for each element:
  - item_id – the id of the tool or supply that corresponds to the id value in the tool table or consumables table.
  - item – the name of the item which is optional but useful to make the json file human readable.
  - table_id – the type of rate:
    - “inventory_rate” (for consumables/supplies),.
    - “primetime_eq_hourly_rate” (for tool),.
    - “training_individual_hourly_rate” (for individual training rate),.
    - “training_group_hourly_rate” (for group training rate)
  - rate_class – the class,
    - “full cost” (for tool, consumable/supply, individual and group training)
    - “cost shared” (for tool)
  - rate – the rate amount.
- NOTE: only the rates defined will be displayed so every tool or supply does not need to be defined and every rate type and class do not need to be defined.
- Examples:
  - Tool and training rates, full cost, cost shared tool rate and individual and group training.
    - The json code in Figure 41.117.

```
[
  {
    "item_id": 4,
    "item": "Sputter",
    "table_id": "primetime_eq_hourly_rate",
    "rate_class": "cost shared",
    "rate": 50.0
  },
  {
    "item_id": 4,
    "item": "Sputter",
    "table_id": "primetime_eq_hourly_rate",
    "rate_class": "full cost",
    "rate": 100.0
  },
  {
    "item_id": 4,
    "item": "Sputter",
    "table_id": "training_individual_hourly_rate",
    "rate_class": "full cost",
    "rate": 150.0
  },
  {
    "item_id": 4,
    "item": "Sputter",
    "table_id": "training_group_hourly_rate",
    "rate_class": "full cost",
    "rate": 75.0
  }
]
```


Figure 41.117: *Configuration tool rates example 1 json*

* Will provide the rate view on the tool control page in Figure 41.118.

Tool rates: Full Cost **$100.00** Shared Cost **$50.00**
Training rates: Individual **$150.00** Group **$75.00**

Figure 41.118: *Configuration tool rates example 1 view*

– Tool and training rates; only full cost tool rate and individual training defined.

  * The json code in Figure 41.119.

```
[
  {
    "item_id": 2,
    "item": "PECVD",
    "table_id": "primetime_eq_hourly_rate",
    "rate_class": "full cost",
    "rate": 100.0
  },
  {
    "item_id": 2,
    "item": "PECVD",
    "table_id": "training_individual_hourly_rate",
    "rate_class": "full cost",
    "rate": 150.0
  }
]
```

Figure 41.119: *Configuration tool rates example 2 json*

  * Will provide the rate view on the tool control page in Figure 41.120.

Tool rates: Full Cost **$100.00**
Training rates: Individual **$150.00**

Figure 41.120: *Configuration tool rates example 2 view*

- Supply rates:
  * The json code in Figure 41.121.

```
[
  {
    "item_id": 1,
    "item": "Tweezers",
    "table_id": "inventory_rate",
    "rate_class": "full cost",
    "rate": 10.0
  },
  {
    "item_id": 2,
    "item": "2 inch wafer tray",
    "table_id": "inventory_rate",
    "rate_class": "full cost",
    "rate": 42.0
  }
]
```

Figure 41.121: *Configuration tool rates example 3 json*

  * Will provide the rate view on the supply page in Figure 41.122.

Sample handling
Tweezers (Cost $10.00)

Sample storage
2 inch wafer tray (Cost $42.00)

Figure 41.122: *Configuration tool rates example 3 view*

To upload a custom rate json file:

- Click the choose file button to open the file selection dialog.
- Select the desired file and click the open button. The selected file name will be displayed next to the choose file button.
- Click the upload button to load the file.
- The selected file will be renamed 'rates.json' and saved in the media folder of the NEMO website.
- Once a file has been uploaded, an option to view the file will be added (Figure 41.123).

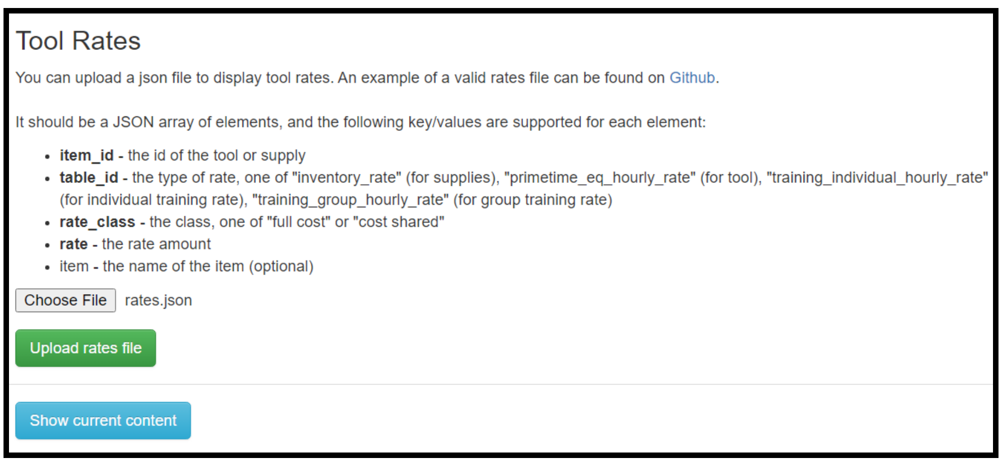


Figure 41.123: *Customization tool rates file loaded*

To delete the currently loaded file:

- Click the upload watermark button without selecting a file to remove the current file from the website media folder.
- A warning dialog will appear.
- Click OK to delete the file or Cancel to leave the file.
- If OK is selected, the filename next to the choose file button will disappear.

To display the contents of the currently loaded file:

- Click the show current content button.
- The current file content will be displayed in a separate window.

41.10 Recurring charges

The Recurring charges settings can be configured to control the name of the feature itself, and a few parameters for the functionality (Figure 41.124).

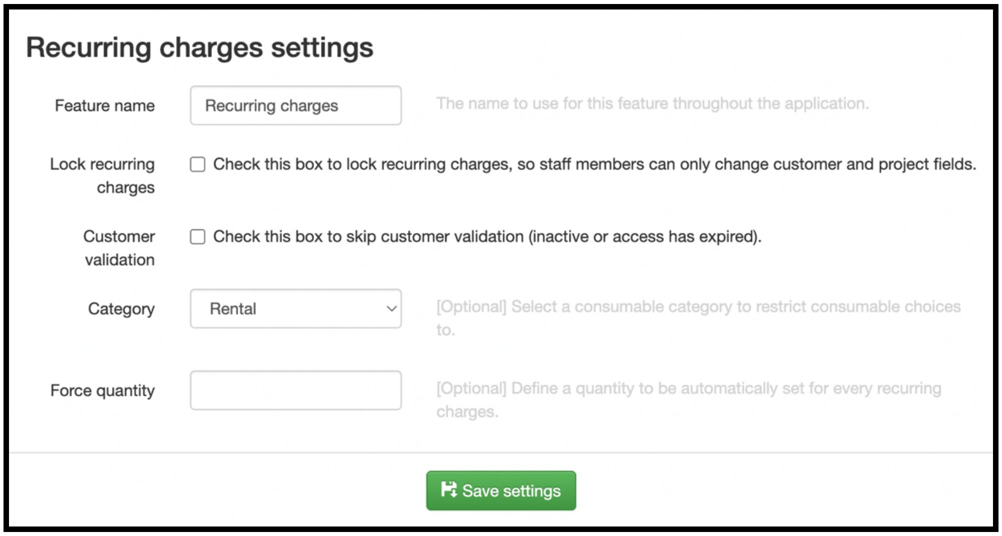


Figure 41.124: *Customization recurring charges settings*

- By default, the recurring charges feature is called "Recurring charges". Click on the text dialog box to change it (Figure 41.125). The name is used in the Administration menu as well as the Detailed administration part of the application. This can be useful for example if only one type of items is reoccurring, i.e., the feature could be named "User bins" or "Gown rentals".

Figure 41.125: *Recurring charges settings feature name*

- Recurring charges can be locked to prevent other staff members from changing any parts of it except for the customer it is assigned to and the project. To lock recurring charges, check the corresponding box (Figure 41.126).

Figure 41.126: *Recurring charges settings lock recurring charge items*

- By default, before an item can be charged, the customer is validated to make sure the user is active, and his access hasn't expired. To skip that validation and charge anyway, check the corresponding box (Figure 41.127).

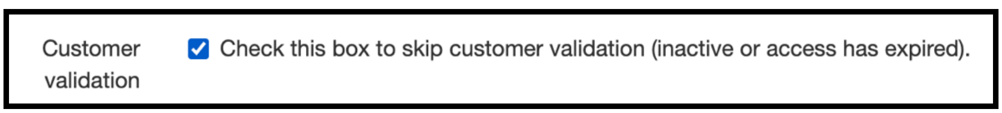


Figure 41.127: *Recurring charges settings skip customer validation*

- By default, all consumable items are available for recurring charges. Here you can select a specific category to limit the choices available for recurring charges (Figure 41.128).

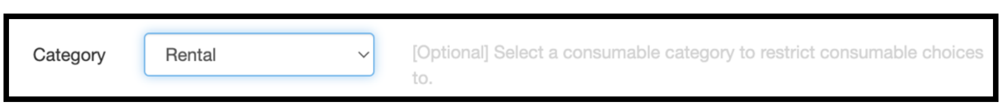


Figure 41.128: *Recurring charges settings consumable category*

- By default, any quantity of consumable can be selected in recurring charges. This allows staff to charge for more than one item at a time, like 5 storage bins at one time for example. To force the quantity to always be set and not offer the choice, enter the number in the dialog box (Figure 41.129). This can be useful if the quantity is always 1 for example.

Figure 41.129: *Recurring charges settings force item quantity*

41.11 Remote work

The remote work settings are used to control whether to allow staff to validate previous work, charge area access time automatically when starting a remote project, and how to determine remote work (Figure 41.130).

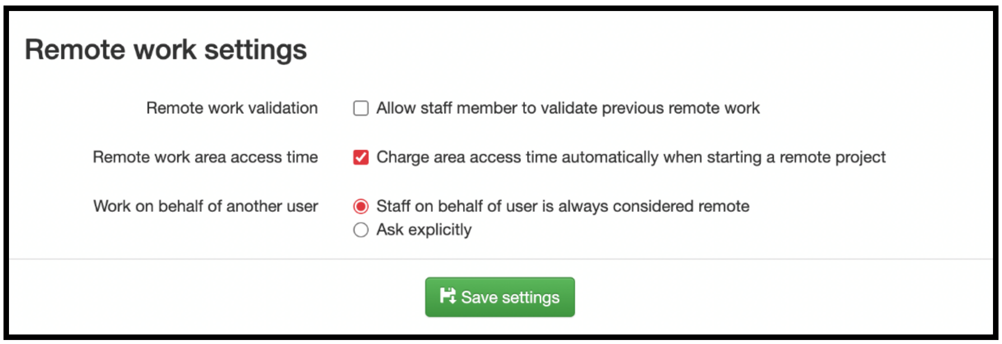


Figure 41.130: *Customization remote work settings*

- If the "Allow staff member to validate previous remote work" checkbox is checked, staff member will have the ability to validate their remote work in the remote work page. This is a simple check for staff and does not have any link to anything in NEMO (Figure 41.131).

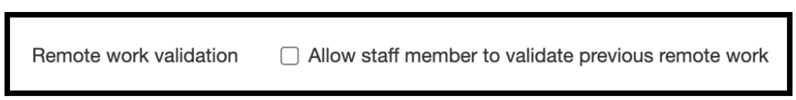


Figure 41.131: *Remote work settings previous work validation*

- By default, when a staff member starts using a tool for a remote project and that tool requires area access, that area access time will start at the same time. Uncheck the box to force staff to manually start area access time (Figure 41.132).

Figure 41.132: *Remote work settings automatic area access charge*

- By default, when a staff member starts using a tool on behalf of a user, it is considered remote work. Select “Ask explicitly” to have separate options for remote work or strictly using a tool on behalf of a user without counting as remote (for billing and reporting purposes) (Figure 41.133).

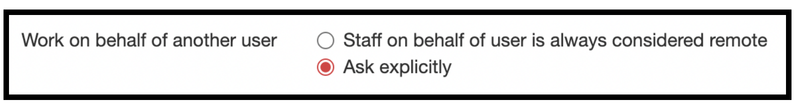


Figure 41.133: *Remote work settings staff on behalf options*

41.12 Safety

The Safety settings can be configured to display the main menu item and the sub-menu items (Figure 41.134).

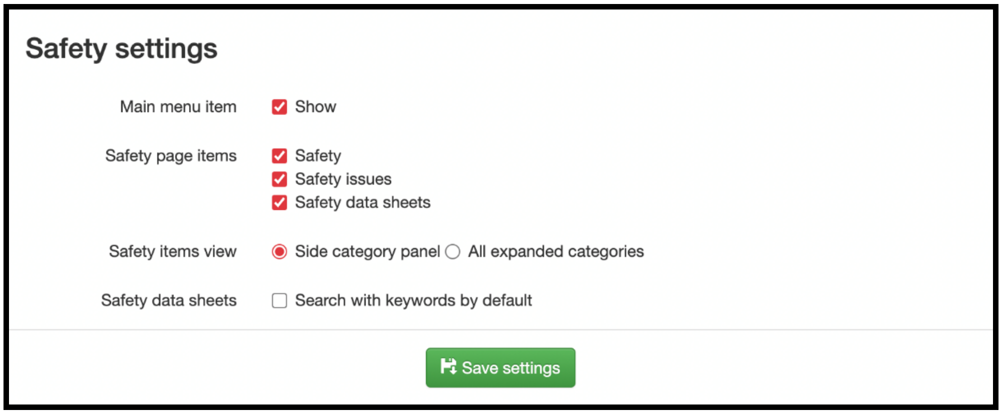


Figure 41.134: *Customization safety settings*

- The main menu item can be hidden by unchecking the corresponding checkbox (Figure 41.135).

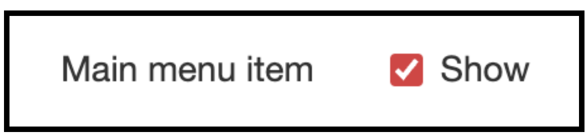


Figure 41.135: *Safety settings show/hide main menu item*

- The safety items tab can be hidden by unchecking the corresponding checkbox (Figure 41.136).

Figure 41.136: *Safety settings show/hide safety item tab*

- The safety issues tab can be hidden by unchecking the corresponding checkbox (Figure 41.137).

Figure 41.137: *Safety settings show/hide safety issues*

- The safety data sheets tab can be hidden by unchecking the corresponding checkbox (Figure 41.138).

Figure 41.138: *Safety settings show/hide safety data sheets*

- The safety item view can be customized between the side category panel (default) and an all-expanded version (Figure 41.139).

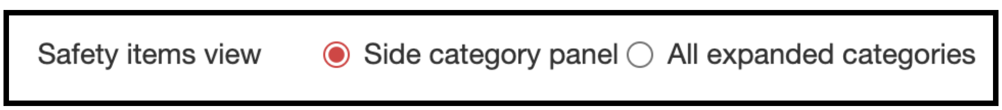


Figure 41.139: *Safety settings safety items view*

- The safety data sheets search can be set to allow keywords search by default (Figure 41.140).

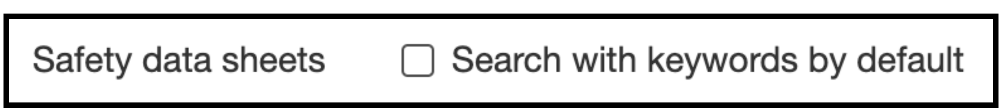


Figure 41.140: *Safety settings safety data sheets keywords search*

41.13 Status dashboard

The dashboard can be configured with different parameters for the occupancy, tool ordering and the staff status page (Figure 41.141).

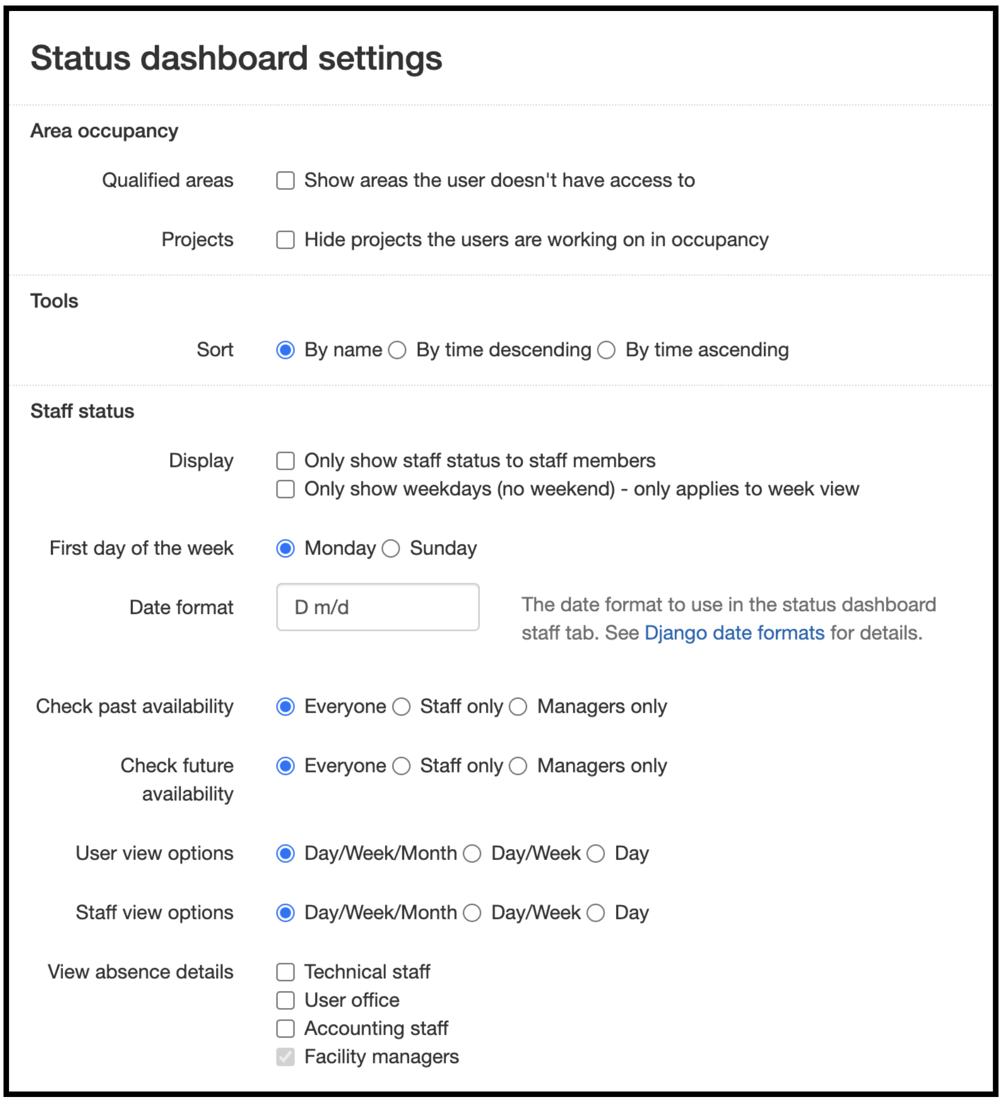


Figure 41.141: *Customization status dashboard settings*

- If the "Show areas the user doesn't have access to" box is checked, the status dashboard will display occupancy of all areas, even the ones the current user doesn't have access to (Figure 41.142).

Figure 41.142: *Customization status dashboard show areas user doesn't have access to checkbox*

- If the "Hide projects the users are working on in occupancy" box is checked, the status dashboard, Jumbotron and other occupancy screens will not display the project column (Figure 41.143).

Figure 41.143: *Customization status dashboard hide projects checkbox*

- In the status dashboard, the tools can be sorted by name, time descending or time ascending (Figure 41.144).

Figure 41.144: *Customization status dashboard tool sort*

- If the "Only show staff status to staff members" box is checked, only staff member will see the staff status page (Figure 41.145).

Figure 41.145: *Customization status dashboard show staff status only to staff checkbox*

- If the “Only show weekdays (no weekend)” box is checked, only weekdays will be shown in the staff status page (Figure 41.146).

Figure 41.146: *Customization status dashboard staff status only show weekdays checkbox*

- The first day of the week displayed on the staff status view can be changed between Monday and Sunday by checking the desired radio button (Figure 41.147).

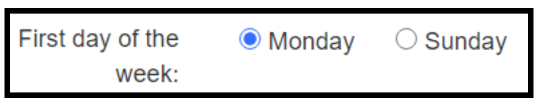


Figure 41.147: *Customization status dashboard staff status first day of week*

- The date format used to display days in the staff status page can be customized (Figure 41.148).

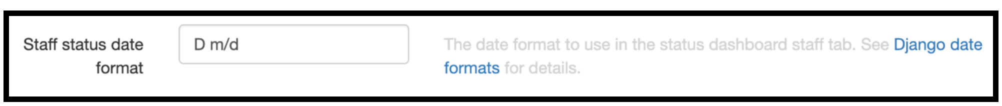


Figure 41.148: *Customization status dashboard staff status date format*

- Whether users or staff member are allowing to check past staff availability can be customized (Figure 41.149).

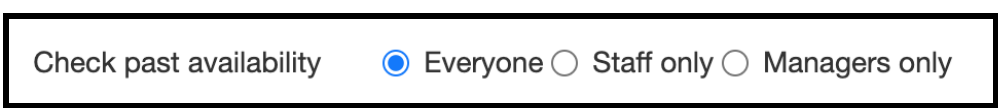


Figure 41.149: *Customization status dashboard staff status check past availability*

- Whether users or staff member are allowing to check future staff availability can be customized (Figure 41.150).

Figure 41.150: *Customization status dashboard staff status check future availability*

- Whether users are allowed to see the week, month view or only day view can be customized (Figure 41.151).

Figure 41.151: *Customization status dashboard staff status user view options*

- Whether staff members are allowed to see the week, month view or only day view can be customized (Figure 41.152).

Figure 41.152: *Customization status dashboard staff status staff view options*

- By default only facility managers are allowed to see staff absence details. Technical staff, user office and accounting staff can be given that permission by checking the relevant box (Figure 41.153).

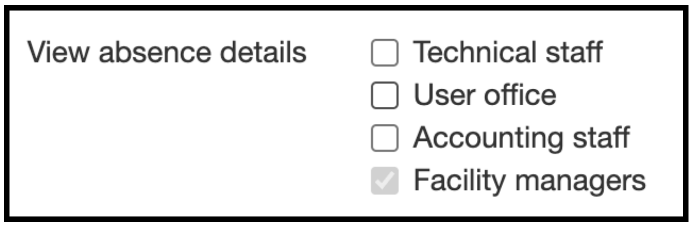


Figure 41.153: *Customization status dashboard staff status see absence details*

41.14 Tools

Tool customizations are separated in five sub-sections, general tool settings, tool configuration, tool problems (Figure 41.154), tool control (Figure 41.166), tool waitlist (Figure 41.175) and tool qualification expiration (Figure 41.178).

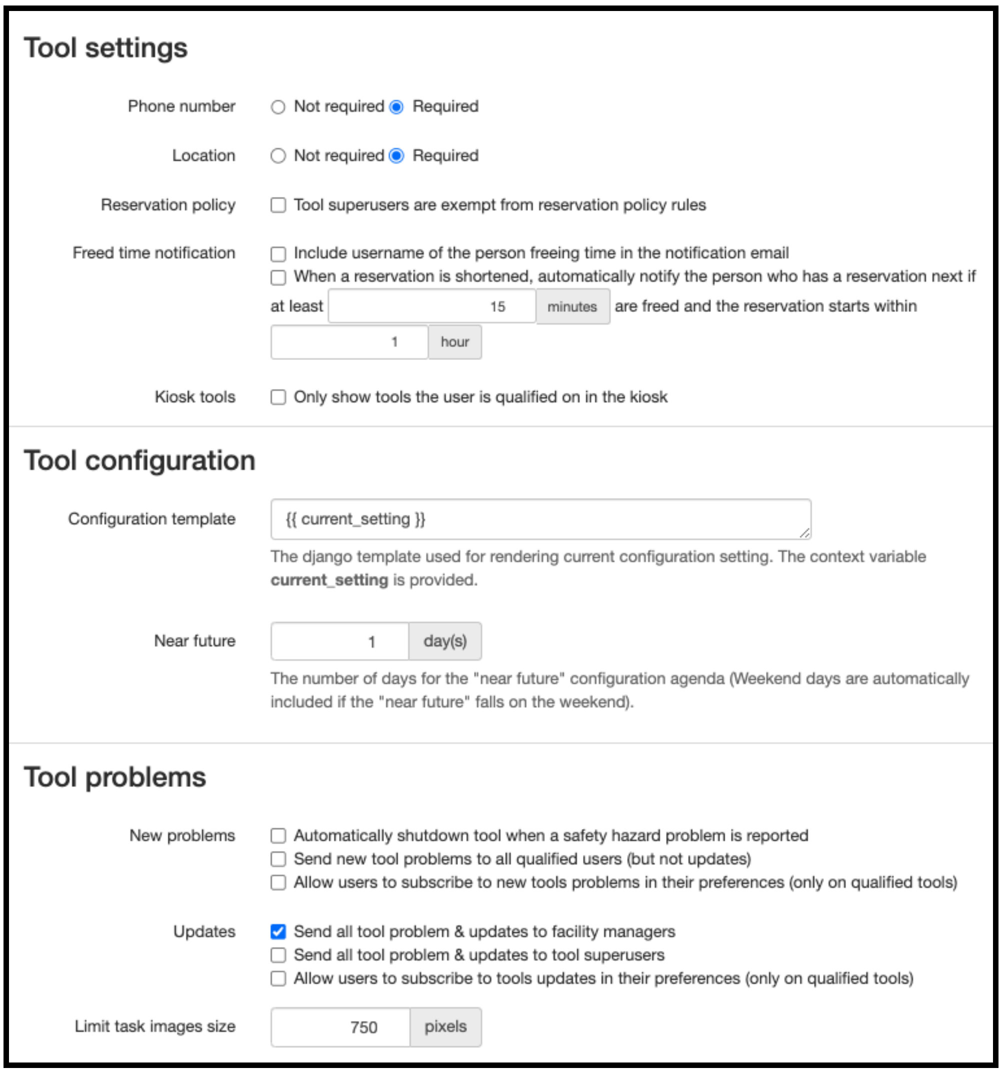


Figure 41.154: *Customization tool settings*

41.14.1 Tool settings

The phone number radio button is used to require the phone number field be filled when creating a tool (Figure 41.155).

Figure 41.155: *Tool settings phone number required*

- The location radio button is used to require the location field be filled when creating a tool (Figure 41.156).

Figure 41.156: *Tool settings location required*

- The "tool superusers are exempt from reservation policy rules" box can be checked so reservation rules don't apply to tool superusers (Figure 41.157).

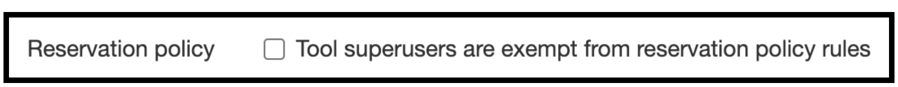


Figure 41.157: *Tool settings superusers exempt from reservation policy rules*

- The “Include username of the person freeing time in the notification email” box can be checked to include the username of the person freeing time in the notification email (Figure 41.158).

Figure 41.158: *Tool settings superusers exempt from reservation policy rules*

- The following checkbox can be checked to automatically send a tool freed time notification to the next person who has a reservation on that tool. The minimum time freed and reservation time horizon can also be configured (Figure 41.159).

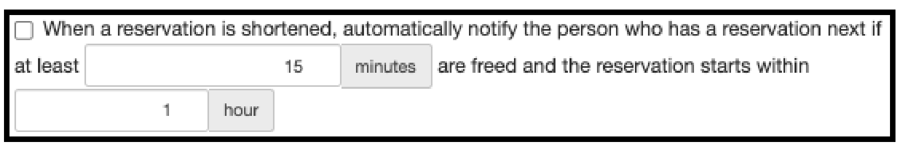


Figure 41.159: *Tool settings freed time automatic notification options*

- The “Only show tools the user is qualified on in the kiosk” checkbox can be checked to only show tools on the Kiosk pages that the user is qualified to use (Figure 41.160).

Figure 41.160: *Tool settings kiosk only show qualified tools*

41.14.2 Tool configuration settings

- The configuration template textarea is used to customize the display of the current configuration setting (Figure 41.161).

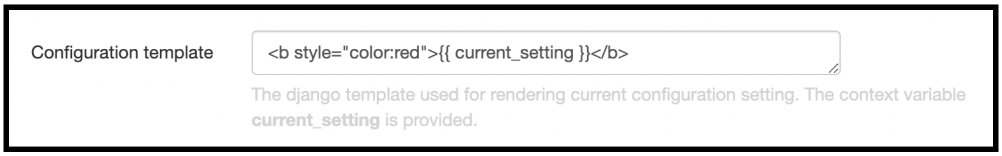


Figure 41.161: *Tool configuration settings configuration template*

- The near future days is used to customize the number of days to display as the “near future” in the configuration agenda. Weekend days (Saturdays & Sundays) are always included. (Figure 41.162).

Figure 41.162: *Tool configuration settings near future days*

41.14.3 Tool problems settings

- The new problems checkboxes are used to decide whether or not a tool should always be shutdown when a safety hazard problem is reported and to control who should receive an email when a new tool problem is reported (Figure 41.163).

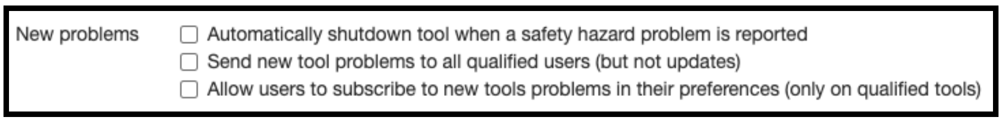


Figure 41.163: *Tool problem new problems*

- The updates checkboxes are used to control who should receive all tool problem updates (Figure 41.164).

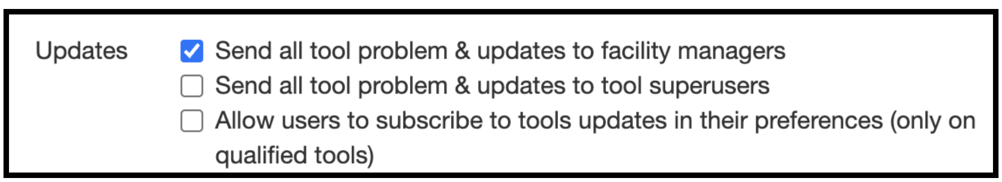


Figure 41.164: *Tool problem updates*

- The limit task image size field is used to control the maximum size for attached images when reporting tool problems. If the image size is greater than the number of pixels set, the image will be resized (Figure 41.165).

Figure 41.165: *Tool settings tool problem updates*

41.14.4 Tool control

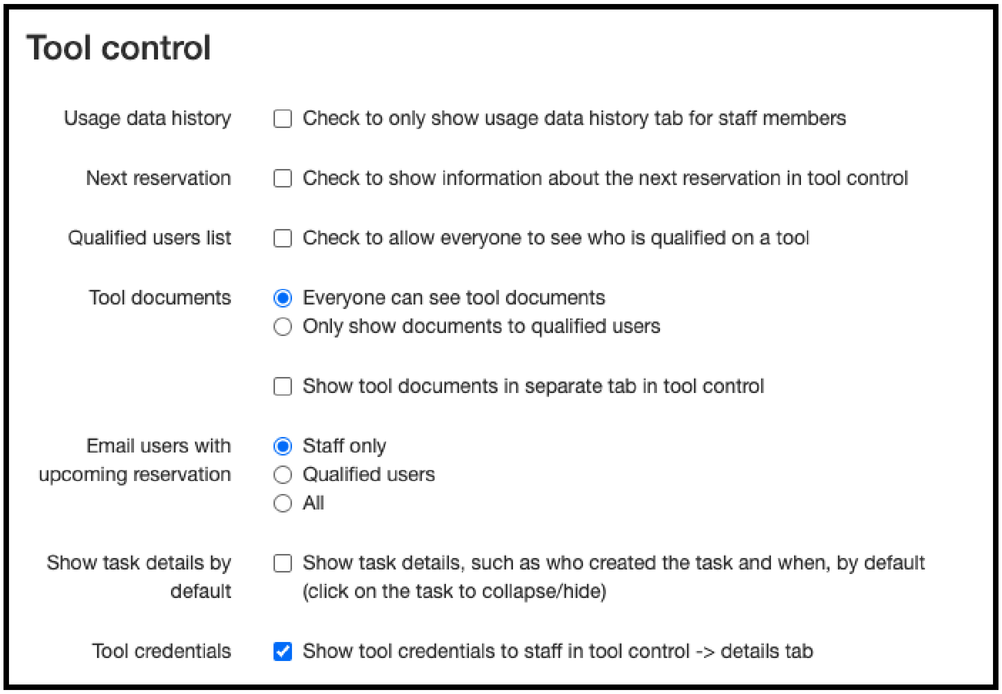


Figure 41.166: *Customization tool control settings*

- The "Usage data history" checkbox can be checked to only show tool usage data history to staff members (Figure 41.167).

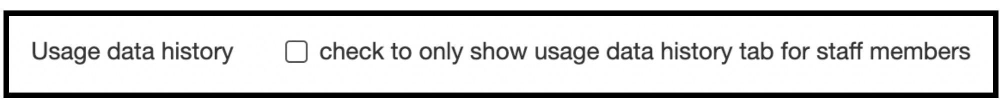


Figure 41.167: *Tool control settings usage data history*

- The “Check to show information about the next reservation in tool control” checkbox can be checked to show the next reservation information in tool control (Figure 41.168).

Figure 41.168: *Tool control settings show next reservation*

- The “Qualified users list” checkbox can be checked to allow everyone to see the qualified users list (Figure 41.169).

Figure 41.169: *Tool control settings qualified users list*

- The “Tool documents” radio buttons can be used to control who can see tool documents (Figure 41.170).

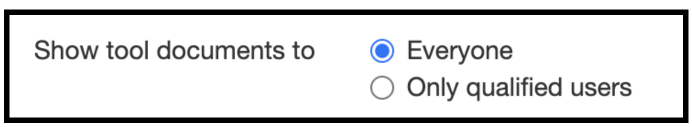


Figure 41.170: *Tool control settings show tool documents*

- The “Show tool documents in separate tab in tool control” checkbox can be checked to display tool documents in a separate tab (Figure 41.171).

Figure 41.171: *Tool control settings tool documents tab*

- The “Email users with upcoming reservation” radio buttons can be used to decide who is allowed to send a broadcast email to other users with an upcoming reservation (Figure 41.172).

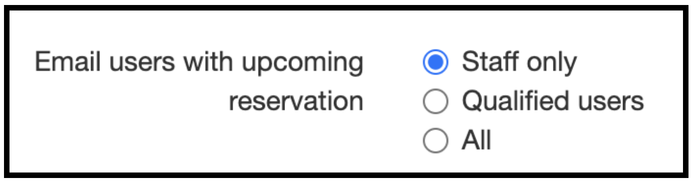


Figure 41.172: *Tool control settings email users with upcoming reservation*

- The “Show task details by default” checkbox can be checked to show information about who reported the issue and when (the task info will be expanded by default) (Figure 41.173).

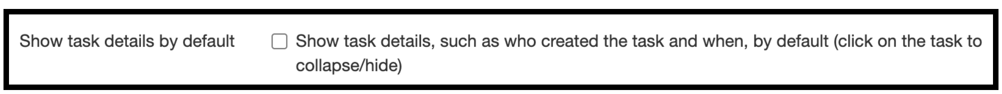


Figure 41.173: *Tool control settings show task details by default*

- The “Show tool credentials to staff in tool control -> details tab” checkbox can be checked to show tool credentials in the tool control section (if applicable) (Figure 41.174).

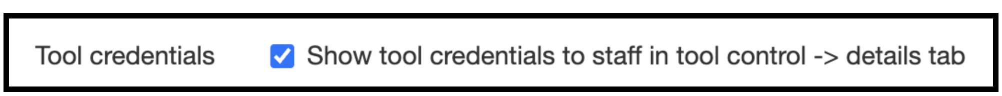


Figure 41.174: *Tool control settings show credentials in tool control*

41.14.5 Tool waitlist

The following settings can be used to set the expiration time for waitlist slots and the time before a reservation when users from the waitlist won't be notified in hybrid mode. This is discussed in more details in the Tool operation modes section 6.4.8.1

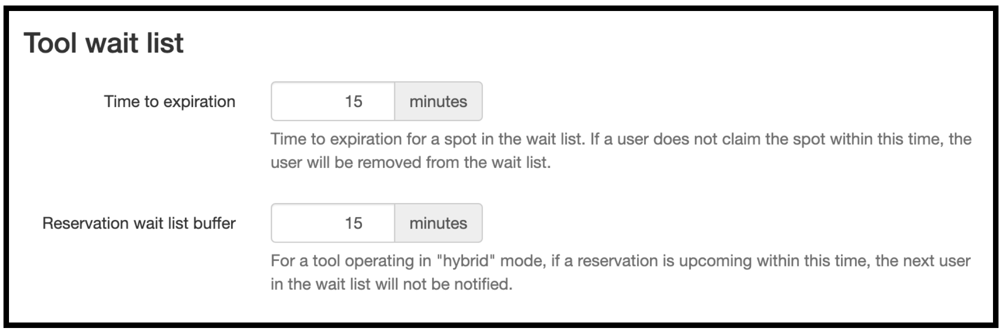


Figure 41.175: *Customization tool waitlist settings*

- Enter the number of minutes for a spot to expire. If the notified user doesn't engage the tool within this time limit, the user will be removed from the waitlist (Figure 41.176).

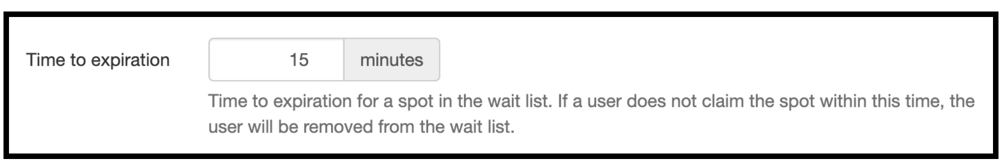


Figure 41.176: *Tool waitlist expiration time*

- Enter the number of minutes for an upcoming reservation that won't notify the next user on the waitlist. This only applies to hybrid mode. (Figure 41.177).

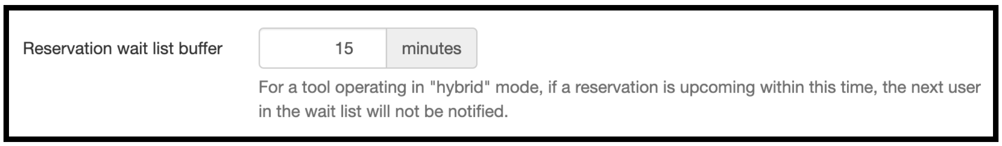


Figure 41.177: *Tool waitlist reservation buffer*

41.14.6 Tool qualification expiration

The tool qualification expiration feature will notify and remove tool qualification from users if they haven't used that tool after a certain time. To enable the feature the Tool qualification expiration email must be uploaded, see subsection 41.5.26. These settings can be used to control the number of days used to determine when users lose their tool qualification and when reminders are sent.

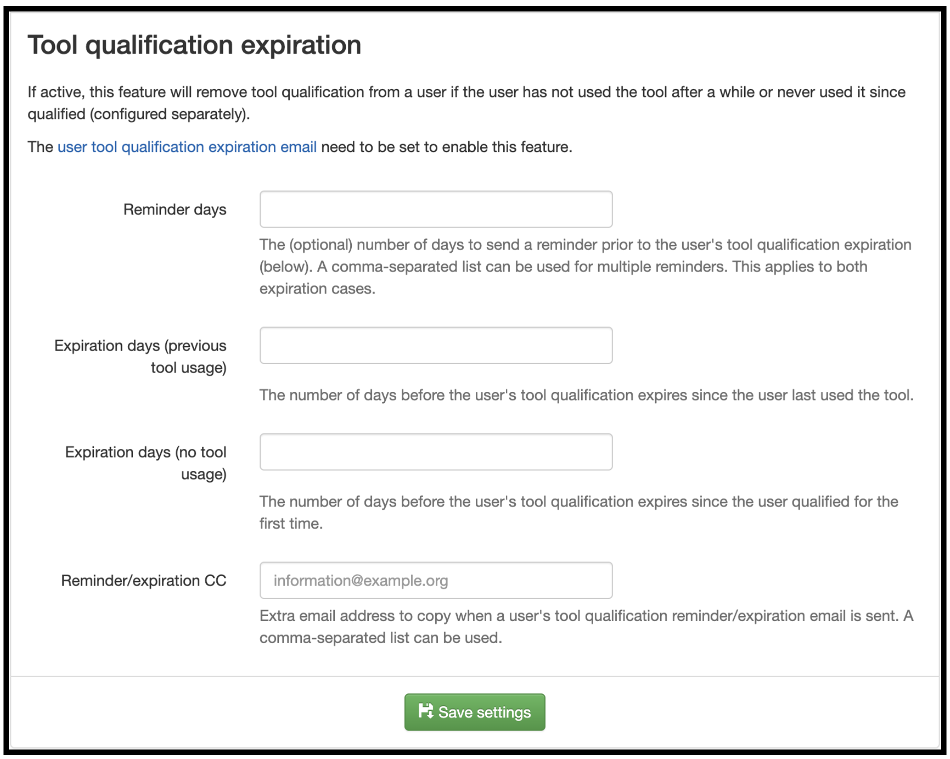


Figure 41.178: *Customization tool expiration settings*

- Enter the number of days to remind users prior to their tool qualification expiring. A comma-separated list can be used. For example, to remind users 2 months, one month and one week before they will lose tool access, enter “60,30,7” (Figure 41.179).

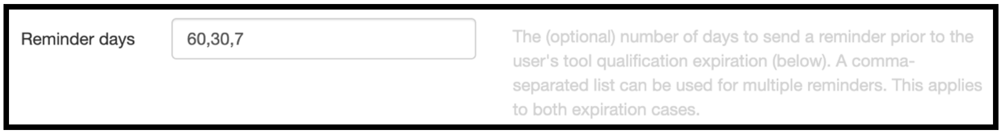


Figure 41.179: *Tool qualification expiration reminder days*

- Enter the number of days after a user last used a tool which will trigger them to lose access in the dialog box. This will only get triggered if they have used the tool in the past. For example, if you wish users to lose access to a tool if they haven’t used it for a year, enter “365” (Figure 41.180).

Figure 41.180: *Tool qualification expiration days previous usage*

- Enter the number of days a user must use a tool after being trained on it before they lose access in the dialog box. This will only get triggered if they have never used the tool in the past. For example, if you wish users to lose access to a tool if they haven’t used it for 2 weeks after being trained on it, enter “14” (Figure 41.181).

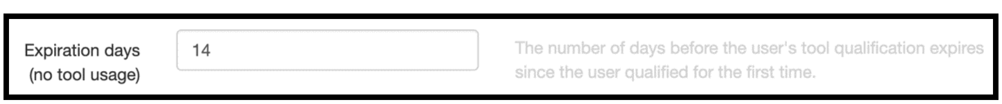


Figure 41.181: *Tool qualification expiration days no usage*

- To cc one or more email addresses on the reminder and expiration email, enter them in the dialog box. A comma-separated list can be used (Figure 41.182).

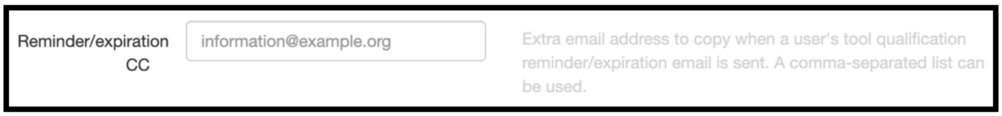


Figure 41.182: *Tool qualification expiration cc*

41.15 Training

The Training settings are used to control which types of training are allowed and whether or not the training date can be picked by the trainer (Figure 41.183).

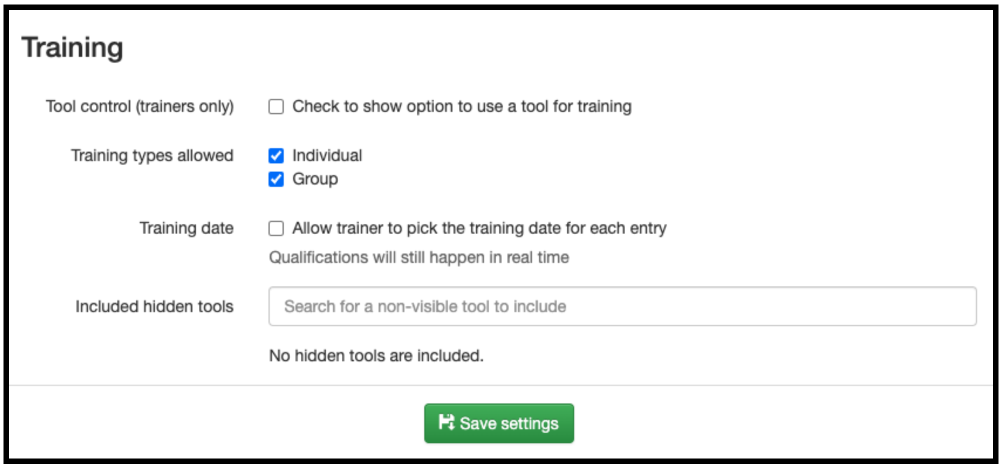


Figure 41.183: *Customization training settings*

- Check the "Check to show option to use a tool for training" checkbox to allow trainers (staff and superusers) to use a tool for training in tool control. It can either be used by the trainer for one of his project or on behalf of another user if the trainer is a staff member (by checking the secondary checkboxes). When a trainer uses a tool for training, he will be automatically redirected to the training record page when disengaging the tool (Figure 41.184).

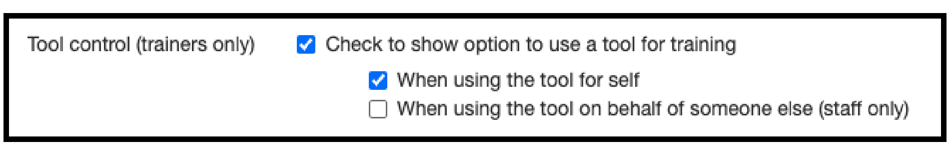


Figure 41.184: *Training settings use tool for training in tool control*

- By default, both individual and group training types are allowed. It can be changed by unchecking the corresponding box. At least one type needs to be checked (Figure 41.185).

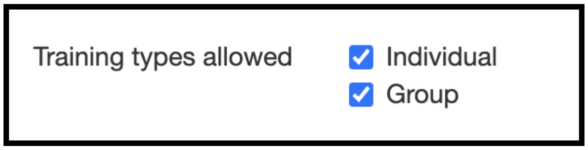


Figure 41.185: *Training settings allowed types*

- By default, the date for training is automatically set to the date the trainer recorded the training. By checking this box, trainers can specify the training date for each record. Only the training date will be set, the qualifications will still happen in real time. (Figure 41.186).

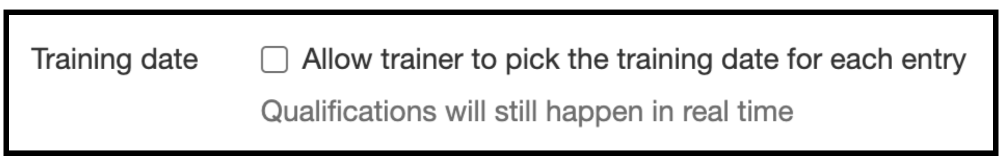


Figure 41.186: *Training settings date*

- By default, training is not allowed for hidden tools, but exceptions can be made here by selecting hidden tools to allow training for (Figure 41.187).

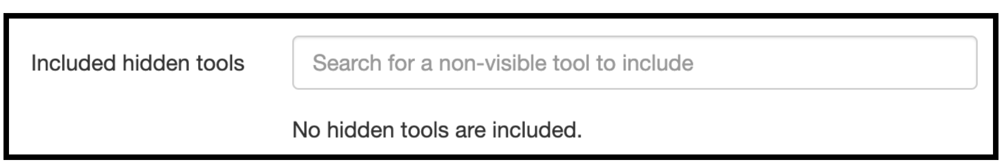


Figure 41.187: *Training settings for hidden tools*

41.16 User

The User settings are used to control general display settings for users and access expiration details (Figure 41.188).

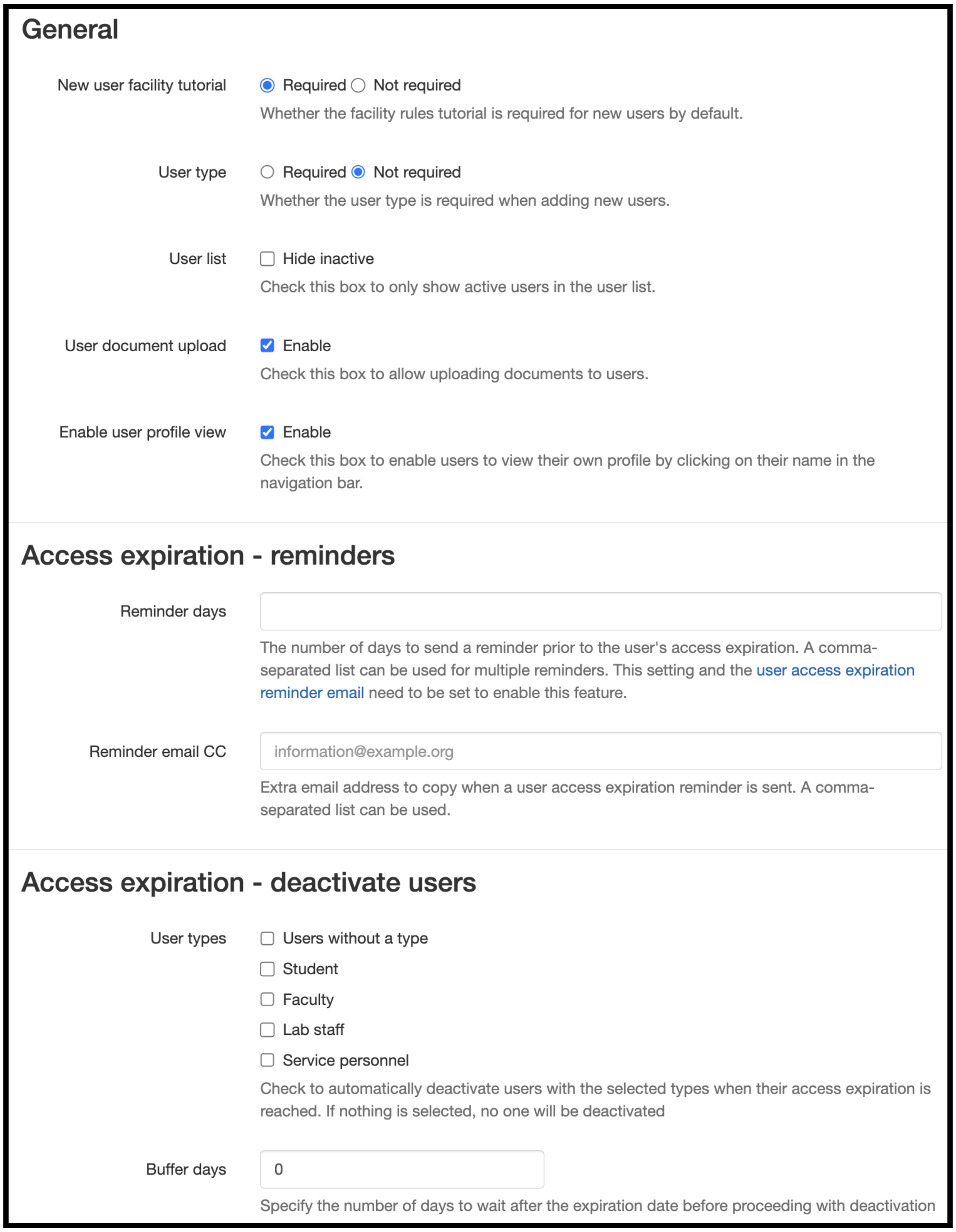


Figure 41.188: *Customization user settings*

41.16.1 General

- By default, the user facility tutorial is required for all new users. To change it, select the "Not required" option (Figure 41.189).

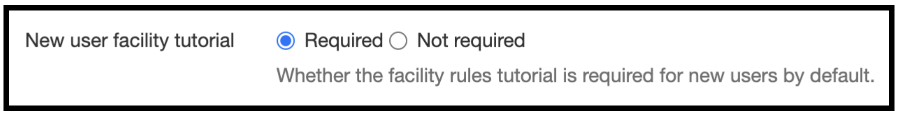


Figure 41.189: *User settings new user facility tutorial*

- By default, a user type is not required for all new users. To change it, select the "Required" option (Figure 41.190).

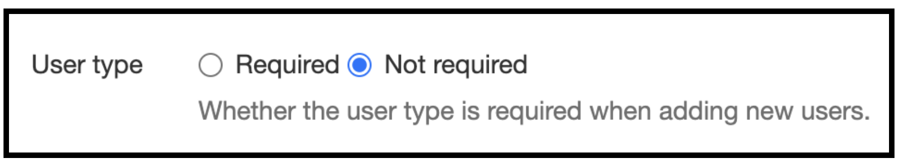


Figure 41.190: *User settings new user require type*

- By default, inactive users are shown in the user list. To hide them, check the "Hide inactive" box (Figure 41.191).

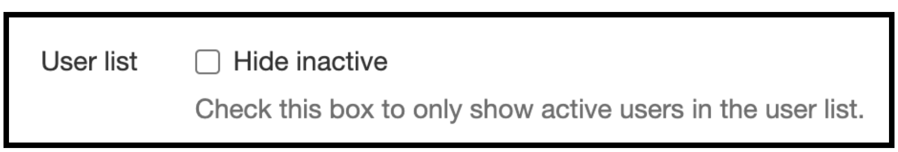


Figure 41.191: *User settings hide inactive users*

- By default, uploading documents to users is disabled. To enable it, check the "Enable" box (Figure 41.192).

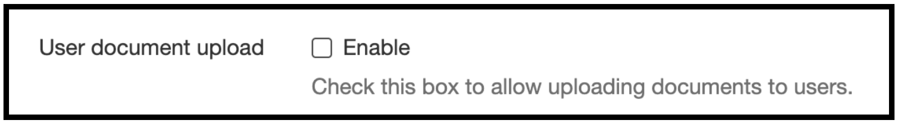


Figure 41.192: *User settings enable document upload*

- To allow user to see their own user profile (including general information, qualifications, projects etc.) check the "Enable" box (Figure 41.193).

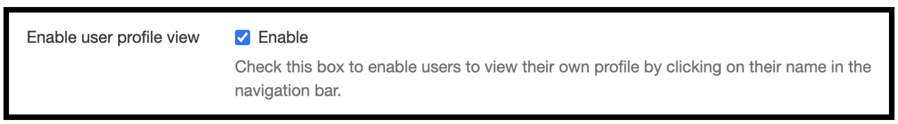


Figure 41.193: *User settings enable user profile view*

41.16.2 Access expiration - reminders

The access expiration reminder is an email that is sent to users at certain number of days before their access is expiring. To enable the feature the User access expiration reminder email must be uploaded, see subsection 41.5.31.

- Enter the number of days to remind users prior to their access expiring. A comma-separated list can be used. For example, to remind users 2 months, one month and one week before their access expires, enter “60,30,7” (Figure 41.194).

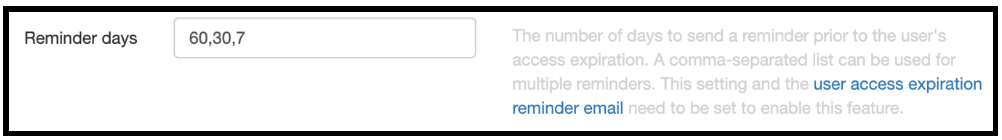


Figure 41.194: *User settings access expiration reminder days*

- To cc one or more email addresses on the reminder email, enter them in the dialog box. A comma-separated list can be used (Figure 41.195).

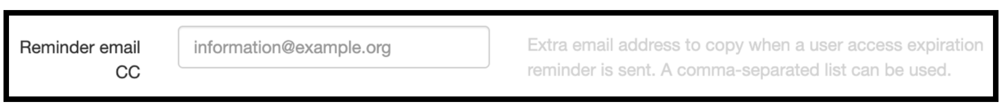


Figure 41.195: *User settings access expiration cc*

41.16.3 Access expiration - deactivate users

When a user reaches their access expiration date, this section can be used to automatically deactivate their user account under certain conditions.

- Select the user types to automatically deactivate. This allow to only deactivate certain users (e.g. external users) while keeping other users (e.g. internal user) active (Figure 41.196).

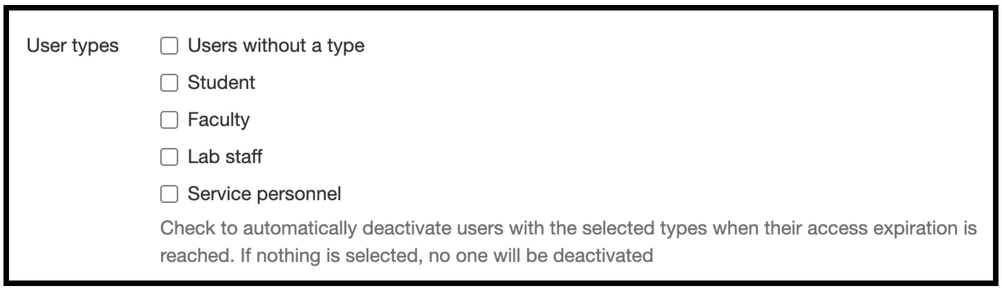


Figure 41.196: *User settings access expiration deactivate user types*

- Enter the number of days to wait after the access expiration has passed for a user("buffer days") before deactivating the users. (Figure 41.197).

Figure 41.197: *User settings access expiration deactivate buffer days*

41.17 User requests

The User requests settings include settings for access requests, buddy requests and staff assistance requests features. The title of each tab can be set, as well as a description message for each of the features, to provide users with instructions specific to your facility. The access requests, buddy board and staff assistance requests are respectively detailed in sections 8.2, 8.1 and 8.4.

41.17.1 Access requests settings

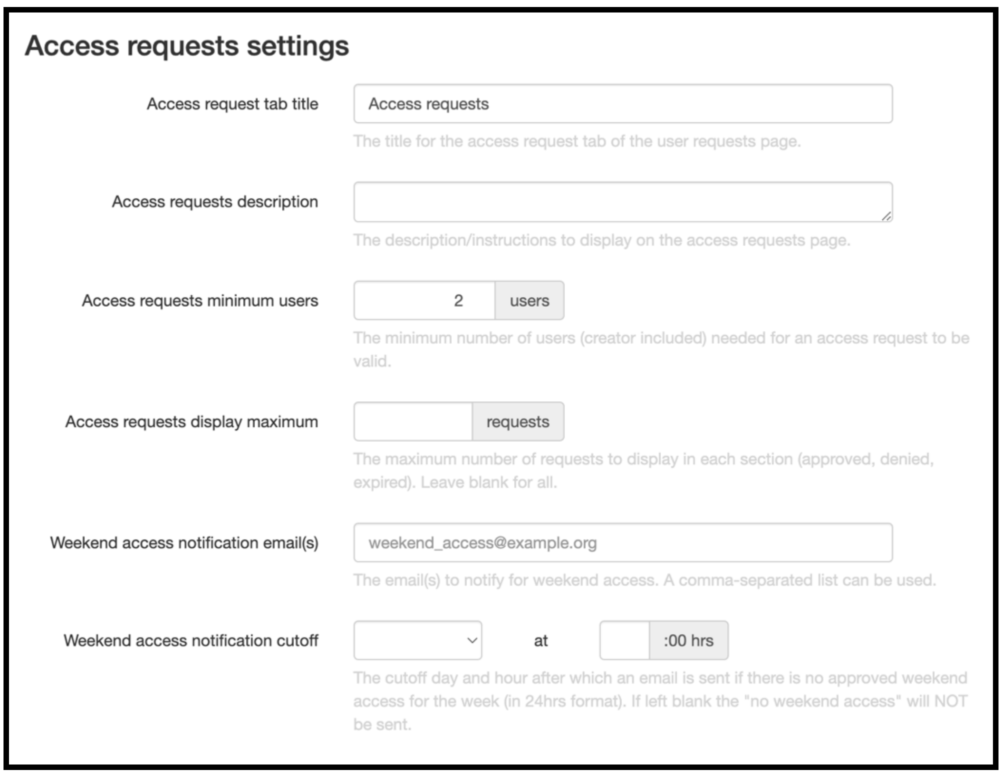


Figure 41.198: *Customization access requests settings*

- The default access request tab title is “Access requests” and is displayed in the Request page, on the tab for the access requests (Figure 41.199). To edit, click on the text field and enter the desired title (Figure 41.200).

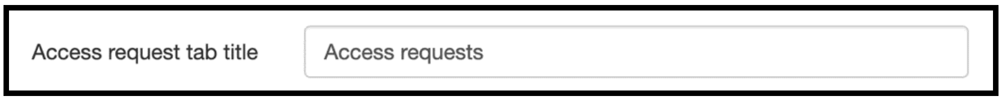


Figure 41.199: *User request settings access request tab title*

Figure 41.200: *Requests access request tab*

- The default message for Access requests description is blank. To edit, click in the dialog box and enter the desired message (Figure 41.201). Note that carriage returns will be displayed to ease visual organization of information.

Figure 41.201: *User requests settings access requests description*

- The default number of required users for an access request is 2 which means anyone submitting an access request needs to select at least 1 user/buddy. To edit, click in the dialog box and enter the desired number (Figure 41.202).

Figure 41.202: *User requests settings access requests minimum users*

- The default number of access requests to display is blank, which means all the requests will be displayed for users in Approved, Denied and Expired sections. The optional limit does not apply to pending requests. To edit, click in the dialog box and enter the desired number (Figure 41.203).

Figure 41.203: *User requests settings access requests display maximum*

- The default emails to send weekend access emails to is blank. A comma separated list can be used. To edit, click in the dialog box and enter the desired email address(es) (Figure 41.204).

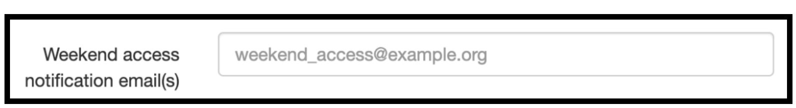


Figure 41.204: *User requests settings access requests weekend access emails*

- The default cutoff day and time to send weekend access emails to is blank. To edit, click in the dropdown and select the day, then click in the dialog box and enter the desired number (Figure 41.205). Note that the time needs to be in 24hrs format.

Figure 41.205: *User requests settings access requests weekend access notification cutoff*

41.17.2 Buddy requests settings

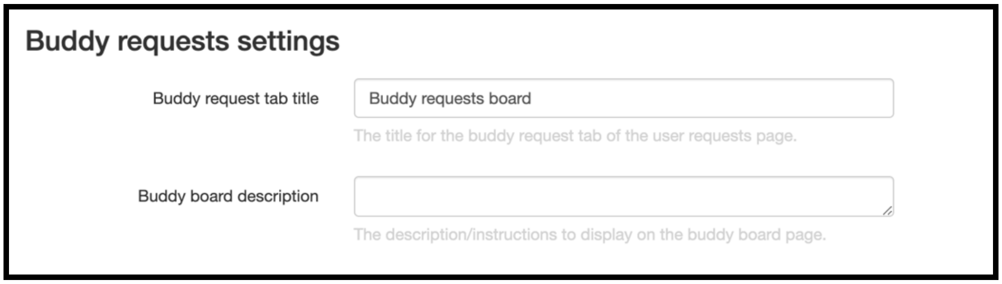


Figure 41.206: *Customization buddy requests settings*

- The default buddy request tab title is "Buddy requests board" and is displayed in the Request page, on the tab for the buddy board (Figure 41.208). To edit, click on the text field and enter the desired title (Figure 41.207).

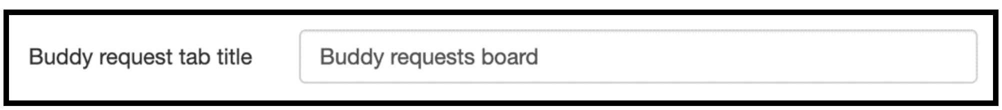


Figure 41.207: *User request settings buddy request tab title*

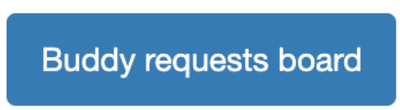


Figure 41.208: *User requests buddy board tab*

- The default message for Buddy board description is blank. To edit, click in the dialog box and enter the desired message (Figure 41.209). Note that carriage returns will be displayed to ease visual organization of information.

Figure 41.209: *User requests settings buddy board description*

41.17.3 Staff assistance requests settings

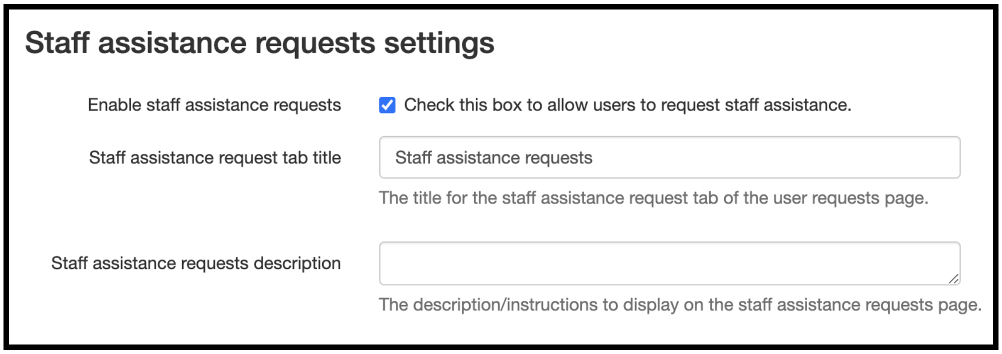


Figure 41.210: *Customization staff assistance requests settings*

- The staff assistance request feature needs to be activated before use (Figure 41.211).

Figure 41.211: *User request settings staff assistance request enable*

- The default staff assistance request tab title is “Staff assistance requests” and is displayed in the Request page, on the tab for the staff assistance requests (Figure 41.212).
  To edit, click on the text field and enter the desired title.

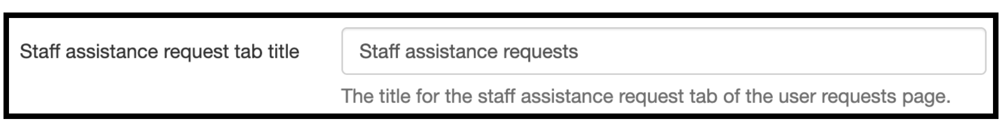


Figure 41.212: *User request settings staff assistance request tab title*

- The default message for Staff assistance requests description is blank. To edit, click in the dialog box and enter the desired message (Figure 41.213). Note that carriage returns will be displayed to ease visual organization of information.

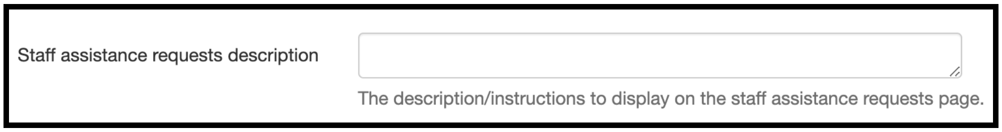


Figure 41.213: *User requests settings staff assistance request description*

CHAPTER 42

Detailed administration

The detailed administration page provides database table access to NEMO data where features can be configured, and usage data can be viewed (Figure 42.1).

Chapter 42 Detailed administration

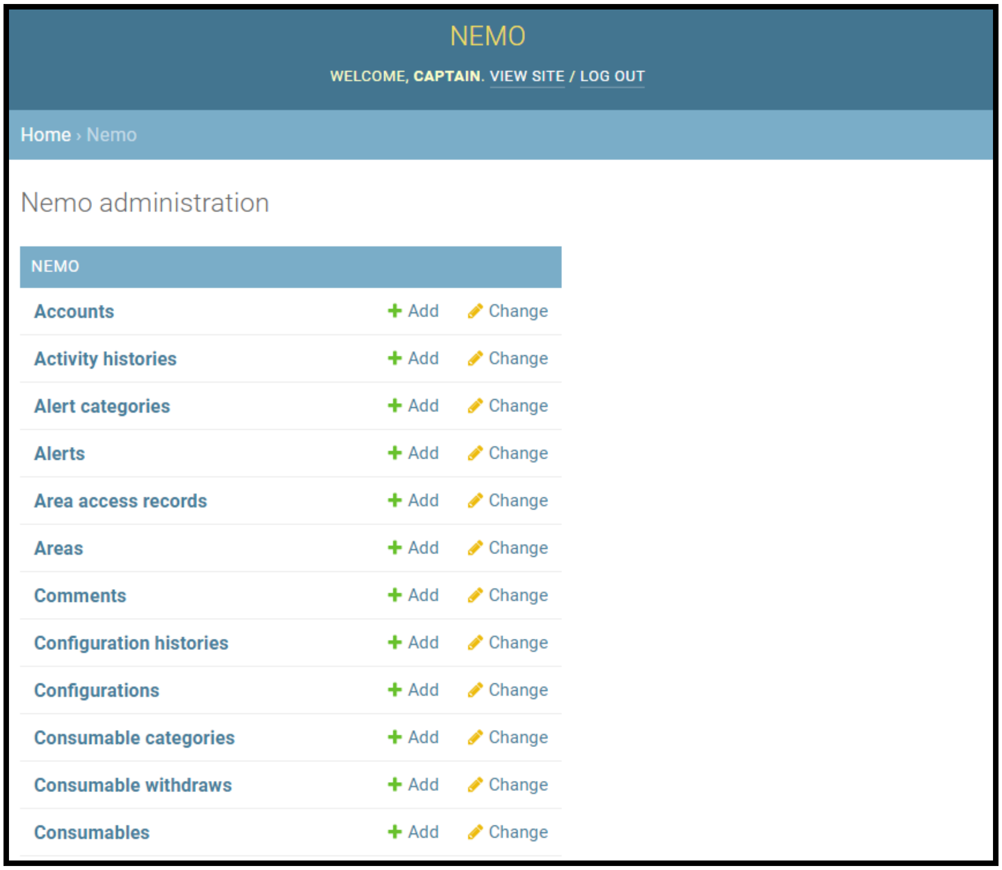


Figure 42.1: *Detailed administration start of table list*

Access to the detailed administration pages requires admin status or individual special permissions. A super user can give access to any user on a table-by-table basis from the users table of the database. The users table of the database discussed in the Detailed administration → Users section 43.71.

Users can return to the NEMO home page by clicking the “view site” link at the top of the page (Figure 42.2).

Figure 42.2: *Detailed administration view site link*

Users can log out of NEMO by clicking the “log out” link at the top of the page (Figure 42.3).

Figure 42.3: *Detailed administration log out link*

Each table can be accessed through the detailed administration page. There are several features that are common across all tables for adding and editing data. Features and details that are unique to a particular table will be discussed in the section specific to the table.

42.1 Adding data

Clicking the Add icon (Figure 42.4) on any table will open a dialog to input data that can be saved into the database.

Figure 42.4: *Detailed administration add data icon*

- The specific fields, their function, and usage will be detailed in each specific table section below. If the fields origin is data from another table in the database, the table name will be listed in italics. For example, Accounts table.
- Required fields are displayed in bold (Figure 42.5)

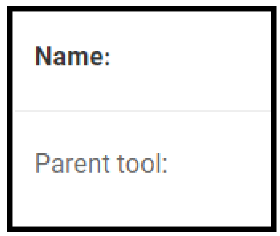


Figure 42.5: *Detailed administration bold and non-bold fields*

- Saving records can be accomplished in three ways (Figure 42.6)
  - Click “save and add another” to save the current record and create another blank record.
  - Click “save and continue editing” to save the current record and stay on the current record for additional changes.
  - Click “save” to save the current record and return to the summary page for the table.

Figure 42.6: *Detailed administration save buttons*

42.2 Changing data

Clicking the Change icon (Figure 42.7) on any table will open a summary of the table rows that can be selected for editing (Figure 42.8). Clicking the table name will also open a summary.

Figure 42.7: *Detailed administration change data icon*

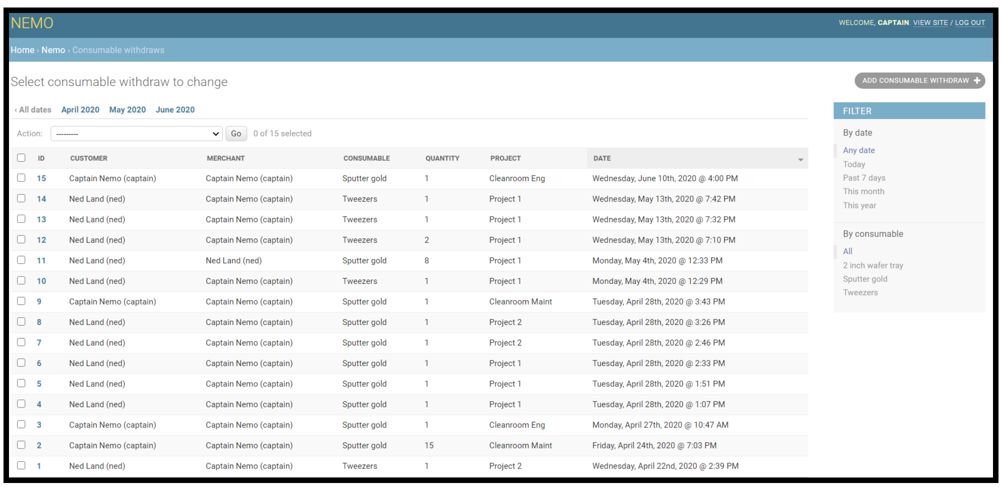


Figure 42.8: *Detailed administration example table summary*

- Edit a record – to access a record for editing, the first column of the summary is a link to the data view (Figure 42.9). The ID field is often displayed in the summary page but is automatically assigned at record creation and is never editable.

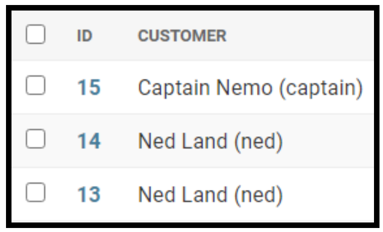


Figure 42.9: *Detailed administration first column link to change data*

  - Click the link to open the change record view (Figure 42.10). The specific view will be discussed in the section for each table.

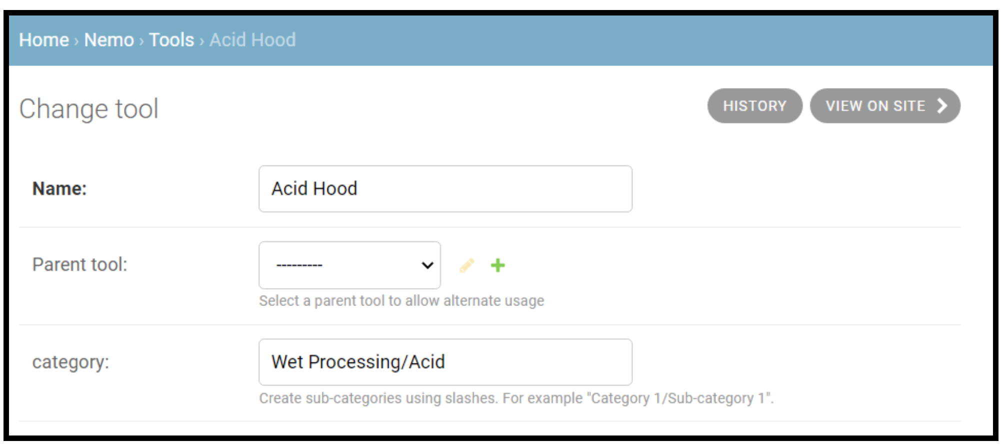
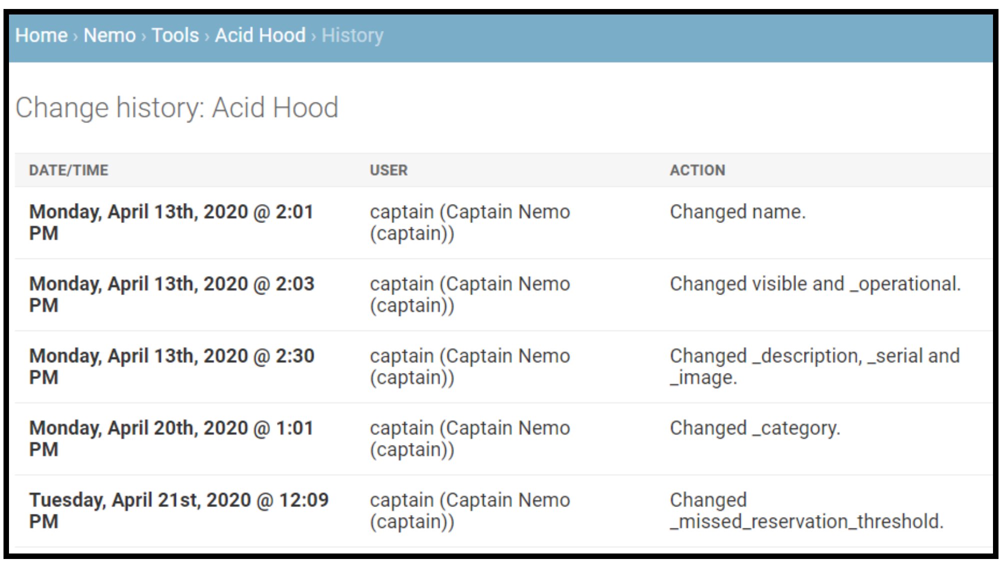


Figure 42.10: *Detailed administration change record example*

– The common features for editing a record are the same as those for adding a new record detailed above with the following exceptions:

  * A history button may be displayed at the top right of the page (Figure 42.11). Clicking the history button will show a summary of the changes that have been made to the record (Figure 42.12).

Figure 42.11: *Detailed administration record history button*



Home › Nemo › Tools › Acid Hood › History

Change history: Acid Hood

DATE/TIME	USER	ACTION
Monday, April 13th, 2020 @ 2:01 PM	captain (Captain Nemo (captain))	Changed name.
Monday, April 13th, 2020 @ 2:03 PM	captain (Captain Nemo (captain))	Changed visible and _operational.
Monday, April 13th, 2020 @ 2:30 PM	captain (Captain Nemo (captain))	Changed _description, _serial and _image.
Monday, April 20th, 2020 @ 1:01 PM	captain (Captain Nemo (captain))	Changed _category.
Tuesday, April 21st, 2020 @ 12:09 PM	captain (Captain Nemo (captain))	Changed _missed_reservation_threshold.

Figure 42.12: *Detailed administration record history*

* A view on site button may be displayed at the top right of the page (Figure 42.13). Clicking the view on page button will redirect to the feature page defined for that table.

Figure 42.13: *Detailed administration view on site button*

* A delete button will be displayed at the bottom of the page (Figure 42.14).

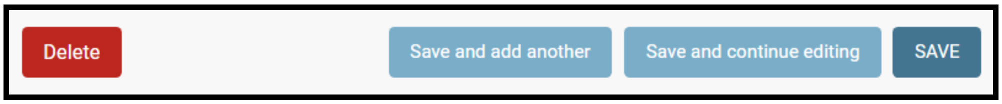


Figure 42.14: *Detailed administration delete button*

- Add record button – the top right side of the summary page will have a button to add new records (Figure 42.15).

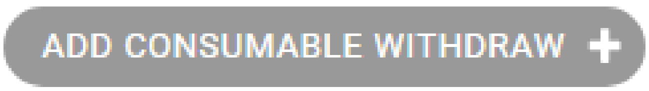


Figure 42.15: *Detailed administration add record button*

- Search – some summary pages have a search dialog at the top of the page that can be used to quickly narrow results to records of interest (Figure 42.16). Enter a search term in the dialog box and click the search button. Partial names and wildcards can be used. Any matching results will be returned.

Figure 42.16: *Detailed administration search dialog*

- Filters can be used to narrow down the record list.
  - Filters may include a date range above the record list that can be clicked to filter results. A date range filter will start at a coarse range and continue to a narrower range. Anytime the date has been filtered, the first filter selection will be to unfilter to the previous filter level.
    - If there is multi-year data, the years with data will be displayed in the filter selection (Figure 42.17).

Figure 42.17: *Detailed administration year filter*

    - Clicking a year filter will show data from that year and change the filter selection to the months with data (Figure 42.18).

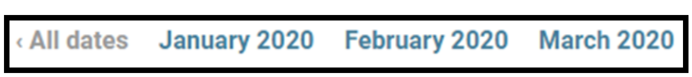


Figure 42.18: *Detailed administration month filter*

* Clicking a month filter will show data from that month and change the filter selection to the days of the month with data (Figure 42.19).

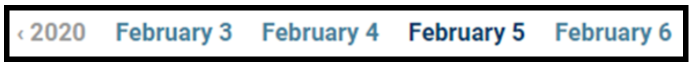


Figure 42.19: *Detailed administration day filter*

* Clicking a day filter will show data from the date selected (Figure 42.20).

Figure 42.20: *Detailed administration date filter*

– Other filters may be included on the right sidebar of the page and can change from page to page (Figure 42.21). However, their function is the same. Click on the filter level desired to narrow down the number of records displayed in the summary page until the records of interest are displayed.

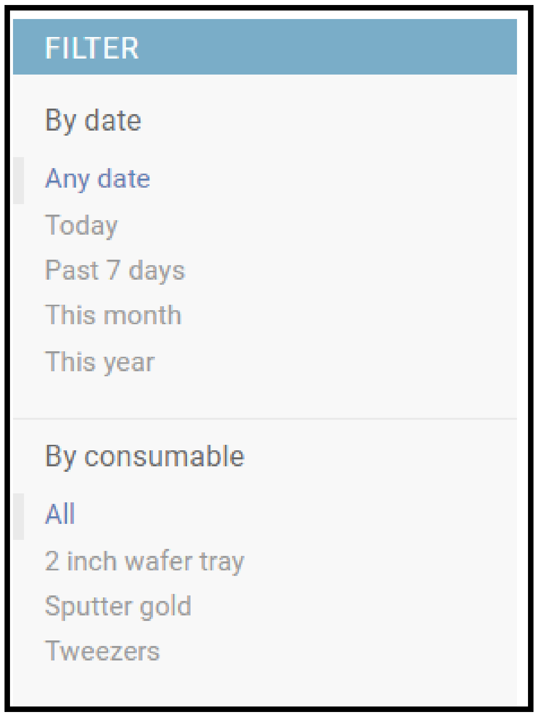


Figure 42.21: *Detailed administration side bar filters*

- Actions can be used to execute a function on one or more records (Figure 42.22).

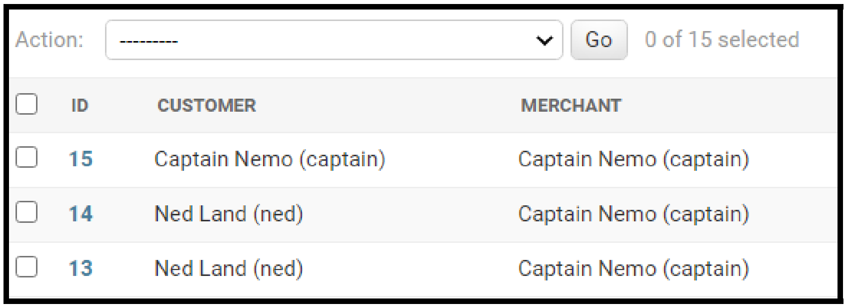


Figure 42.22: *Detailed administration action menu*

  - Every table has a delete record action.
  - To execute a function on one or more records:
    - Select the records of interest by checking the checkbox on the left of the record. Checking the checkbox in the title bar will select all records (Figure 42.23).

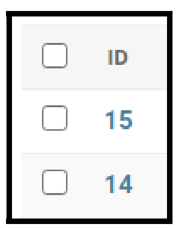


Figure 42.23: *Detailed administration select records*

* Select the action to execute from the drop-down list (Figure 42.24).

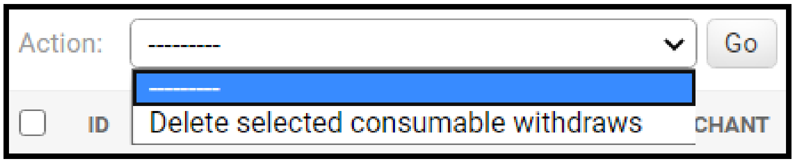


Figure 42.24: *Detailed administration select action*

* Click “go” (Figure 42.25).

Figure 42.25: *Detailed administration action go button*

- When deleting records, a list of impacts and related items will be displayed with a prompt to confirm or cancel the action (Figure 42.26).

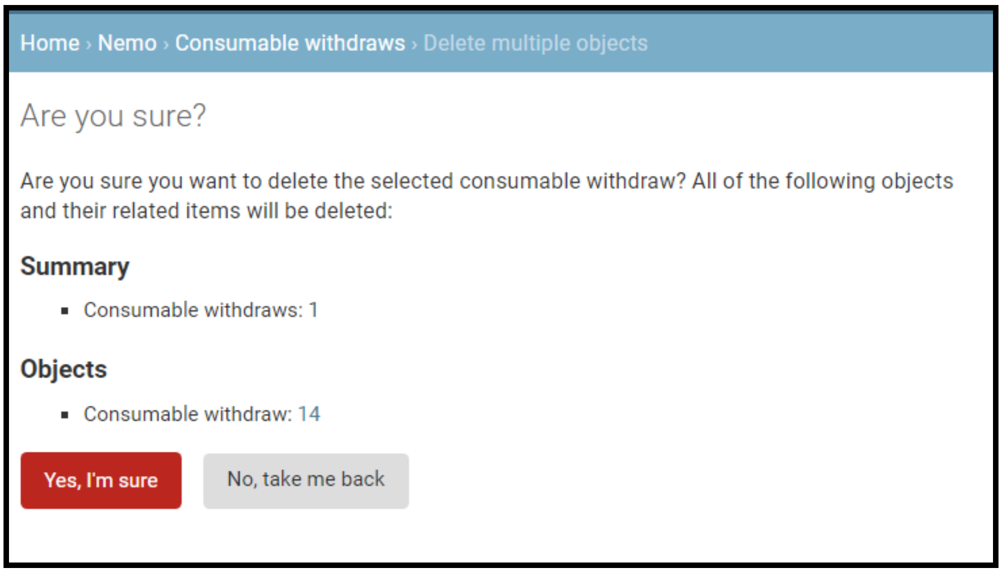


Figure 42.26: *Detailed administration delete confirmation dialog*

- Click the yes button to continue or the no button to cancel (Figure 42.27).

Figure 42.27: *Detailed administration delete confirmation buttons*

- Sort – the summary list of records can be sorted by clicking on the column title (Figure 42.28).

Figure 42.28: *Detailed administration sort indicators*

  - An arrow next to the column title indicates sort direction. Down arrow indicates descending and up arrow indicates ascending.
  - If multiple columns are clicked, then records are sorted in order of precedence with the last clicked column having the highest precedence. Lower numbers have higher precedence. Hovering over a sorted field heading will show an icon ( ) to remove sorting from that column (Figure 42.29). Click the icon to remove sorting.

Figure 42.29: *Detailed administration remove sorting*

CHAPTER 43

Detailed administration – NEMO (admin or authorized users)

43.1 Account types

43.1.1 Usage

Account types are optional but can be useful for binning accounts aiding in future analysis and trending. Account types, if used, must be created in this table view and can be any text name. Any number can be defined. If no account types are defined, they are not displayed on the account page. Account types are discussed in the account page chapter 22.

43.1.2 Summary Page

The summary page provides a listing of account types (Figure 43.1). Click the name field in the row of interest to edit.

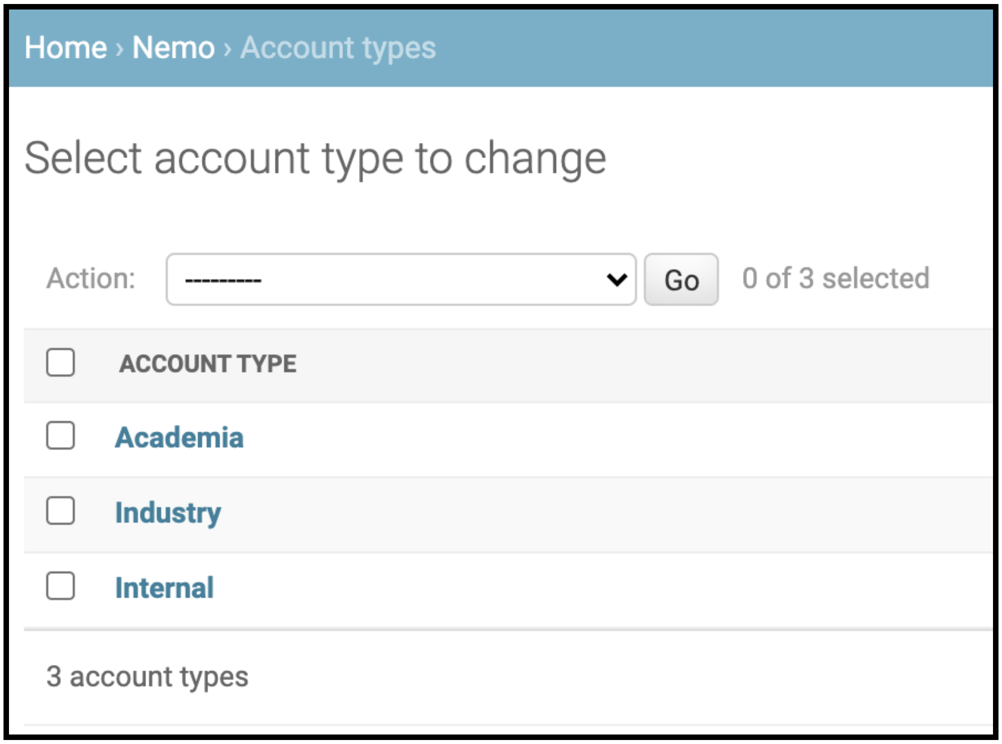


Figure 43.1: *Account types summary page*

43.1.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.2).

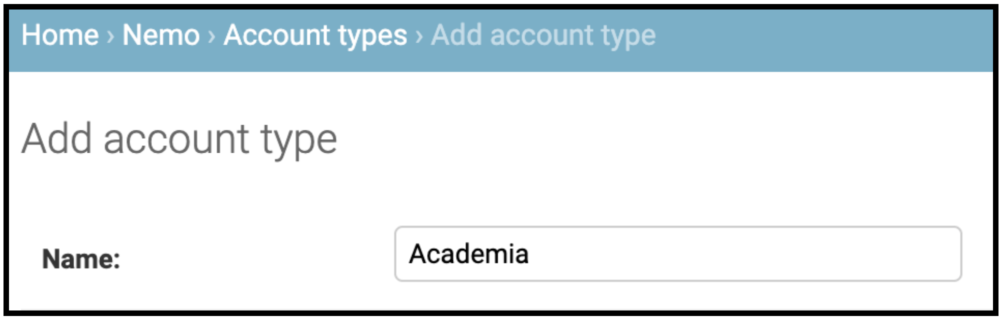


Figure 43.2: *Account types add/edit page*

- Name – the name can be up to 200 characters (required).

43.1.4 User access page

There is no user access page to create account types however, account types are discussed in the account page chapter 22.

43.2 Accounts

43.2.1 Usage

An account is at the top of the billing hierarchy. This is where you send the bill. An account can have many projects. Users make charges to projects which are carried to accounts. A detailed discussion of accounts can be found in the Accounts and projects chapter 22.

43.2.2 Summary Page

The summary page provides a search dialog and filtering of the active field (Figure 43.3). Click the name field in the row of interest to edit.

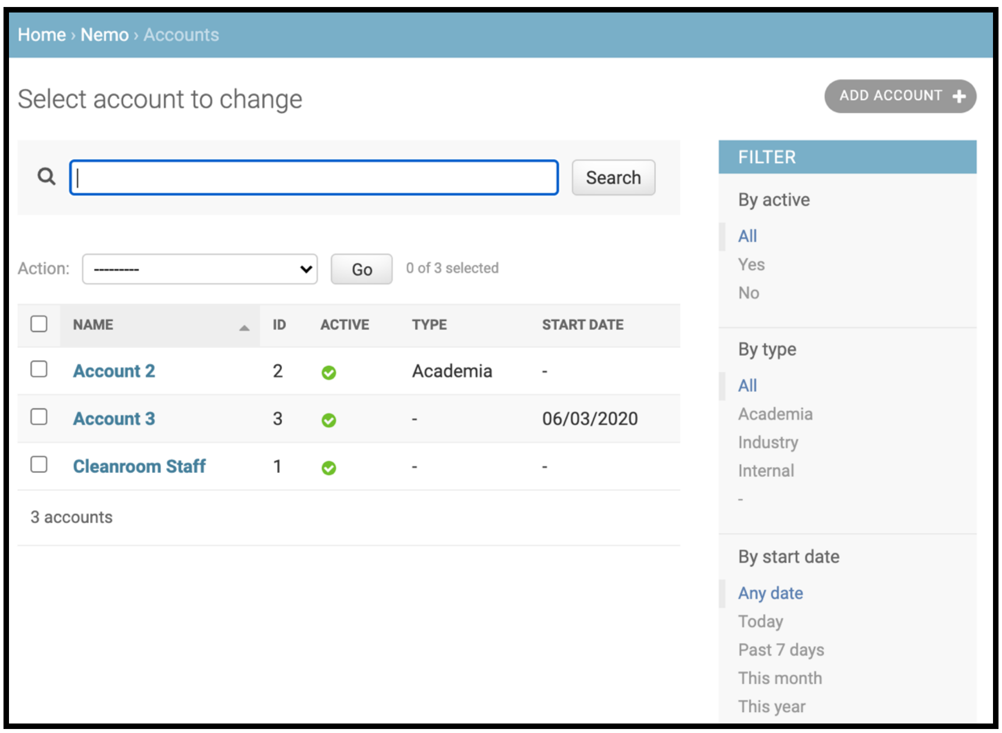


Figure 43.3: *Accounts summary page*

43.2.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.4).

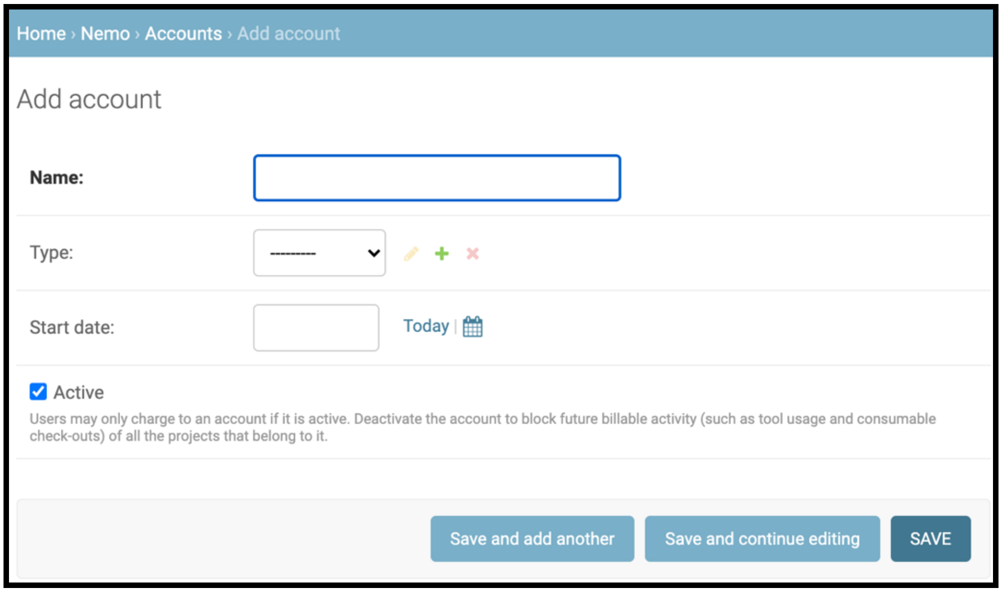


Figure 43.4: *Accounts add/edit page*

- Name – this is the name referred to for the account. It can be a maximum of 100 characters and must be unique (required).
- Type – this is the type for the account. Account types are discussed in Account types section 43.1.
- Start date – the account start date.
- Active – this indicates if the account is available to be used. Users may only charge to an account if it is active. Deactivate the account to block future billable activity (such as tool usage, etc.) of all the projects that belong to it.

43.2.4 User access page

Accounts are created and managed on the accounts and projects page detailed in the Accounts and projects chapter 22.

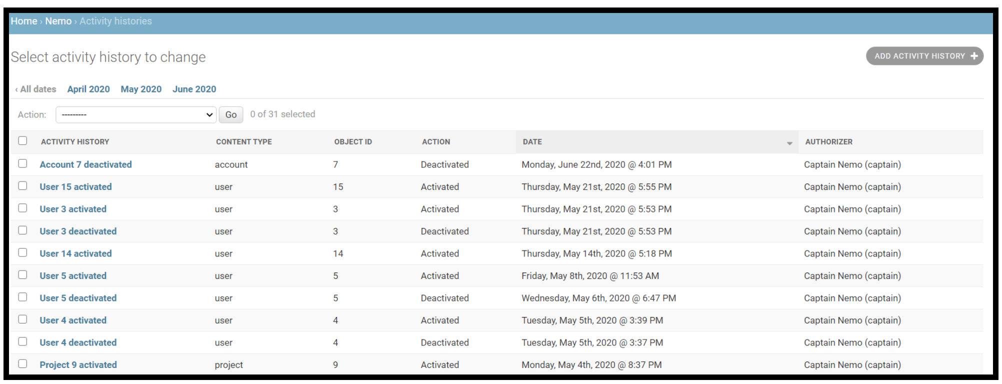
43.3 Activity histories

43.3.1 Usage

The activity histories table maintains a record of changes made to the active status of users, projects, and accounts. Records are written automatically, and manual entry or editing should not be necessary.

43.3.2 Summary Page

The summary page provides date filtering (Figure 43.5). Click the activity history field in the row of interest to edit.


Home › Nemo › Activity histories

Select activity history to change

ADD ACTIVITY HISTORY

‹ All dates April 2020 May 2020 June 2020

Action: --------- Go 0 of 31 selected

ACTIVITY HISTORY	CONTENT TYPE	OBJECT ID	ACTION	DATE	AUTHORIZER
Account 7 deactivated	account	7	Deactivated	Monday, June 22nd, 2020 @ 4:01 PM	Captain Nemo (captain)
User 15 activated	user	15	Activated	Thursday, May 21st, 2020 @ 5:55 PM	Captain Nemo (captain)
User 3 activated	user	3	Activated	Thursday, May 21st, 2020 @ 5:53 PM	Captain Nemo (captain)
User 3 deactivated	user	3	Deactivated	Thursday, May 21st, 2020 @ 5:53 PM	Captain Nemo (captain)
User 14 activated	user	14	Activated	Thursday, May 14th, 2020 @ 5:18 PM	Captain Nemo (captain)
User 5 activated	user	5	Activated	Friday, May 8th, 2020 @ 11:53 AM	Captain Nemo (captain)
User 5 deactivated	user	5	Deactivated	Wednesday, May 6th, 2020 @ 6:47 PM	Captain Nemo (captain)
User 4 activated	user	4	Activated	Tuesday, May 5th, 2020 @ 3:39 PM	Captain Nemo (captain)
User 4 deactivated	user	4	Deactivated	Tuesday, May 5th, 2020 @ 3:37 PM	Captain Nemo (captain)
Project 9 activated	project	9	Activated	Monday, May 4th, 2020 @ 8:37 PM	Captain Nemo (captain)

Figure 43.5: *Activity histories summary page*

43.3.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.6). In addition, the history button will show any manual changes that were made to the record.

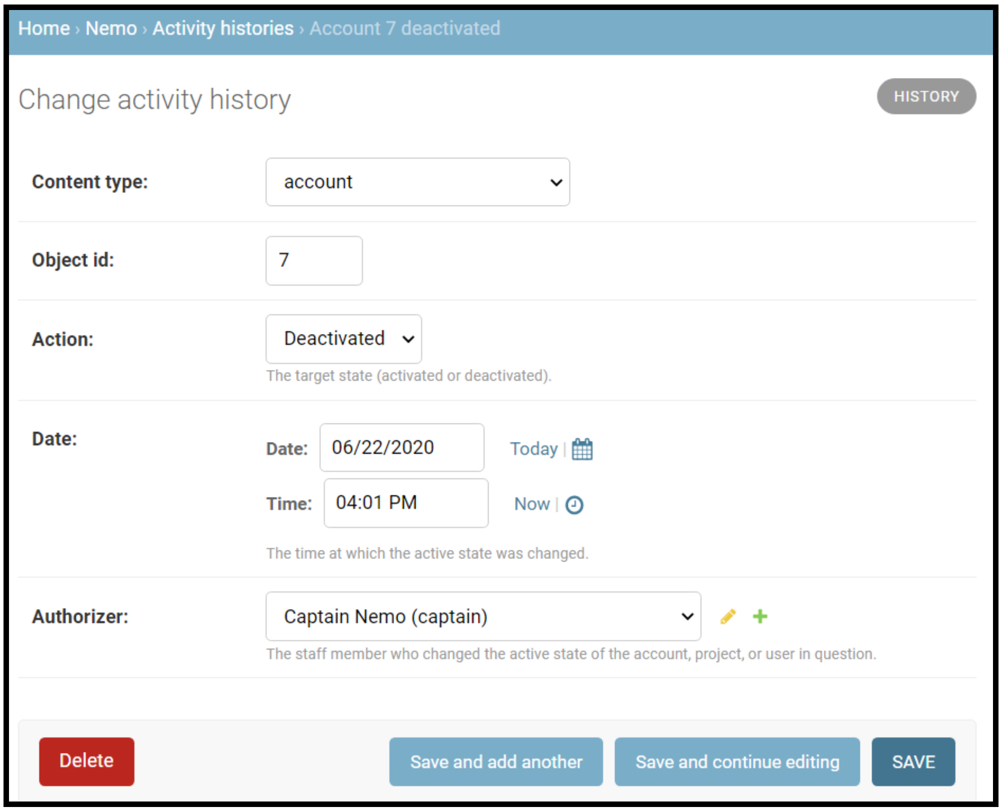


Figure 43.6: *Activity histories add/edit page*

- Content type – a large selection is available under the dropdown however, NEMO only uses accounts, projects, and users (required).
- Object id – this field is the id number of the account, project, or user (required).
- Action – this field is either activated or deactivated (required).

- Date – date and time the action was taken (required).
- Authorizer – user that initiated the action (required). User table

43.3.4 User access page

Activity histories are automatically recorded through actions initiated on accounts, projects, and users. Accounts and projects are detailed in the Accounts and projects chapter 22. Users are detailed in the users section 43.71.

43.4 Adjustment requests

43.4.1 Usage

The adjustment requests table stores the requests entered on the Adjustment requests feature, see section 8.3.

43.4.2 Summary Page

The summary page provides a listing of adjustment requests (Figure 43.7). Click the creator field in the row of interest to edit.

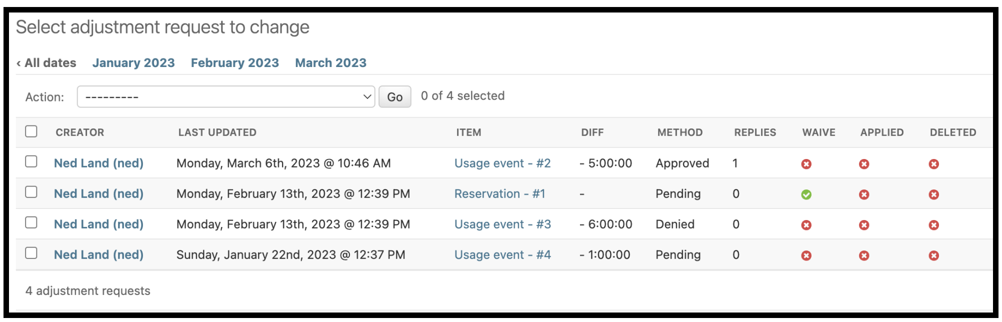


Figure 43.7: *Adjustment request summary page*

43.4.3 Fields

The add/change page for this table lists the fields that can be edited (Figures 43.8 and 43.9).

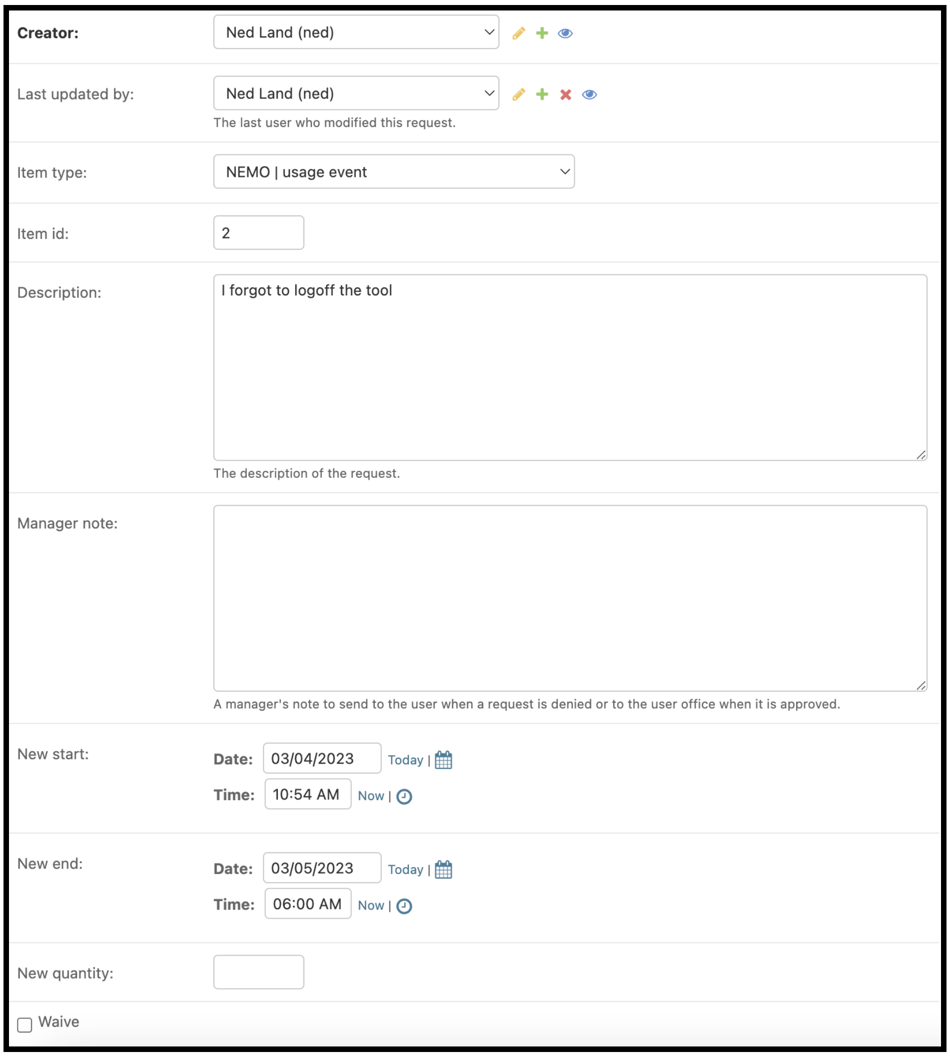


Figure 43.8: *Adjustment request add/edit page*

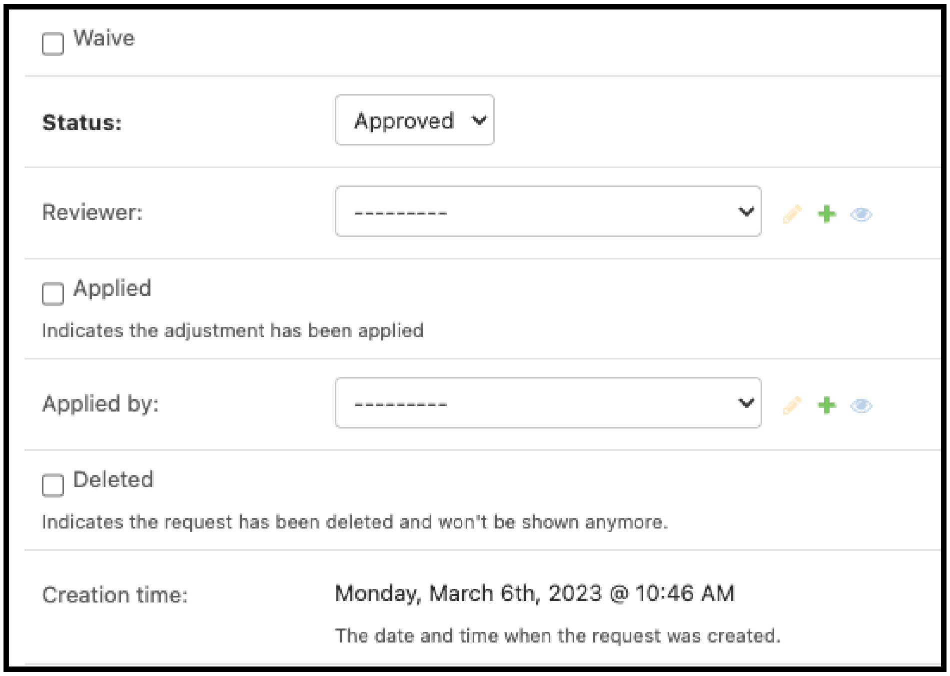


Figure 43.9: *Adjustment request add/edit page (continued)*

- **Creator** – the user submitting the request from the drop-down (required).
- Last updated by – the user who last updated the request.
- Item type – the content type of the charge.
- Item id – the id of the charge.
- **Description** – the description of the adjustment request (required).
- Manager note – the manager note sent to either the user if the request is denied or to the User Office if the request is approved.
- New start – the new start date for the charge (if applicable).
- New end – the new end date for the charge (if applicable).

- New quantity – the new quantity for the charge (for consumable adjustment only).
- Waive – check the box to indicate the user requested the charge to be waived.
- **Status** – the status of this request (required)
- Reviewer – the user who approved or denied this request.
- Applied – checkbox indicates if the request was applied by a reviewer (for example applied. outside of NEMO).
- Applied by – the user who applied this adjustment.
- Deleted – checkbox indicates if request was deleted by user and won't be displayed any longer.

43.4.4 Adjustment request message fields

The adjustment request messages can be edited directly at the bottom of the adjustment request form (Figure 43.10).

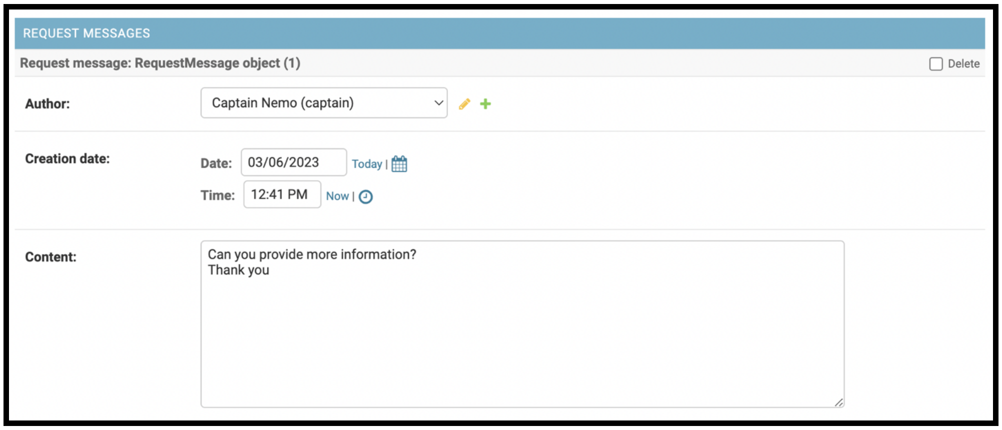


Figure 43.10: *Adjustment request messages add/edit page*

- **Author** – the user reply author (required) (Users Table).
- **Creation date** – the reply creation date/time (required).
- **Content** – the reply message (required).

43.4.5 User access page

Records are typically not edited or created directly in this view. There is an Adjustment requests page for managing adjustment requests, discussed in section 8.3.

43.5 Alert categories

43.5.1 Usage

Alert categories are optional but can be useful for binning alerts aiding in future analysis and trending. Alert categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no alert categories are defined, they are not displayed on the alerts page. Alert categories are discussed in the Alerts section 43.6.

43.5.2 Summary Page

The summary page provides a listing of alert categories (Figure 43.11). Click the name field in the row of interest to edit.

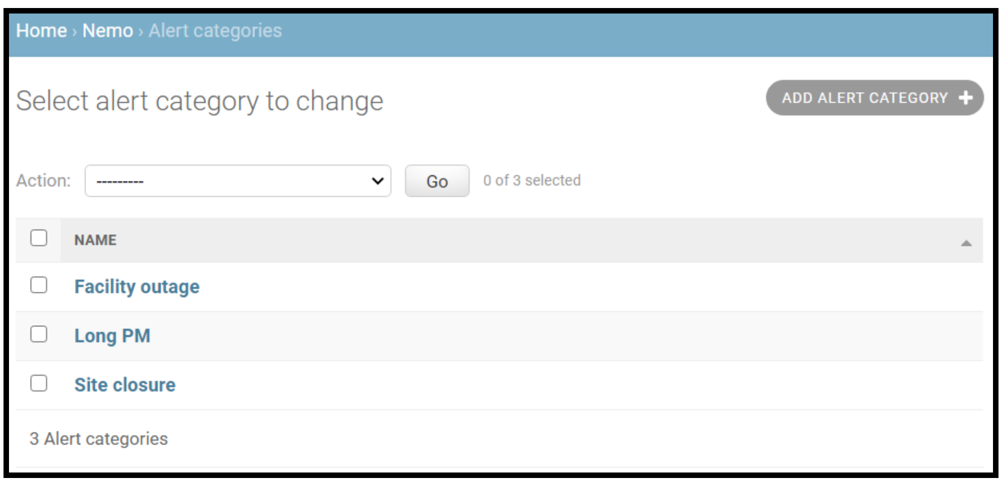


Figure 43.11: *Alert category summary page*

43.5.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.12).

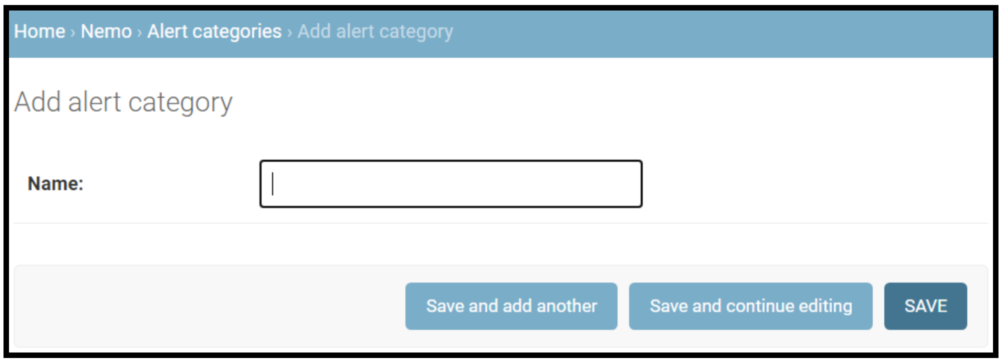


Figure 43.12: *Alert category add/edit page*

- Name – the name can be up to 200 characters (required).

43.5.4 User access page

Alert categories are discussed in the Alerts section 43.6.

43.6 Alerts

43.6.1 Usage

Alerts are used to notify users of upcoming events that can impact lab or equipment availability. Alerts are discussed in the Alerts section 43.6. Alerts are created and edited through a NEMO page and manual editing of this table should not be necessary.

43.6.2 Summary Page

The summary page provides a listing of alerts (Figure 43.13). Click the title field in the row of interest to edit.

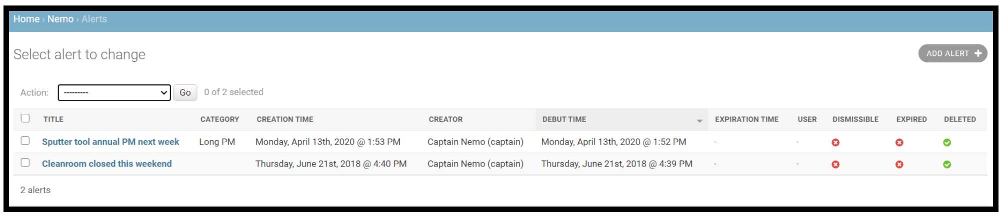


Figure 43.13: *Alerts summary page*

43.6.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.14).

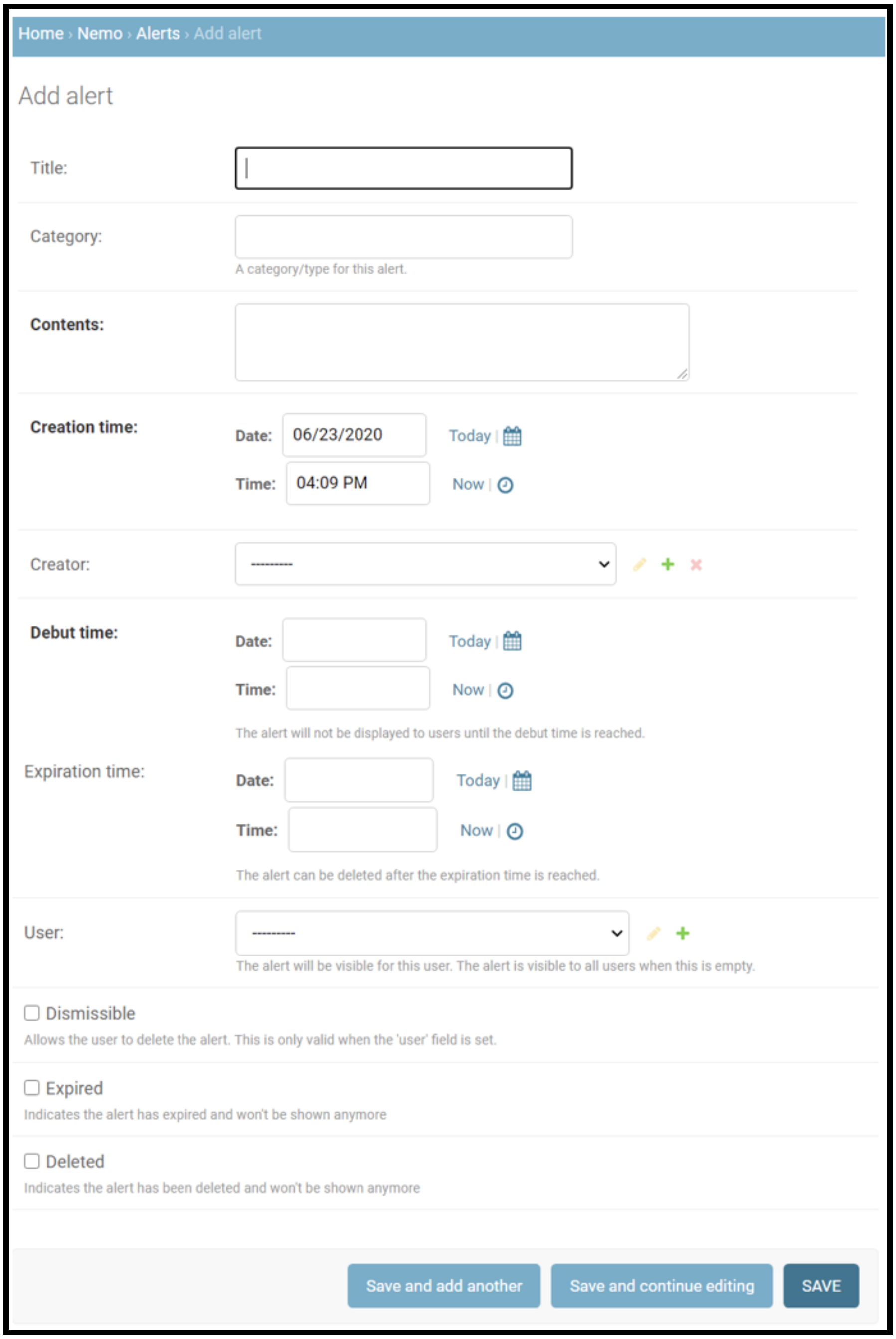


Figure 43.14: *Alerts add/edit page*

- Title – title to be displayed for the alert, maximum of 100 characters.
- Category – category of the alert selected from alert categories. Alert categories table
- Contents – message to describe the alert, maximum of 500 characters (required).
- Creation Time – the date/time the alert was created (required).
- Creator – the user that created the alert. Users table
- Debut time – the time the alert will start displaying on the landing page (required).
- Expiration time – the time the alert will expire and stop being displayed on the landing page.
- User – the user targeted for the alert, this will be blank for all users. Users table
- Dismissible – only valid when a user is selected, allows user to delete the alert.
- Expired – indicates the alert has expired and will not be displayed any longer.
- Deleted – indicates the alert was deleted and will not be displayed any longer.

43.6.4 User access page

Alerts are discussed in the Alerts section 43.6.

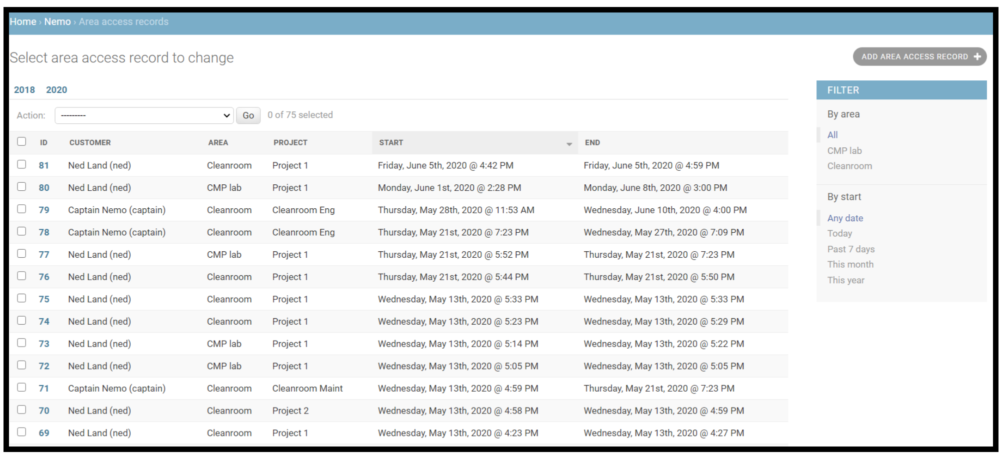
43.7 Area access records

43.7.1 Usage

The area access records table maintains the list of users that have accessed an area. Records are written automatically when a user enters/exits an area. Manual editing may be necessary to correct an access record if for example a user forgets to log out of an area.

43.7.2 Summary Page

The summary page provides date filtering, filtering by area, and by start date (Figure 43.15). Click the id field in the row of interest to edit.



ID	CUSTOMER	AREA	PROJECT	START	END
81	Ned Land (ned)	Cleanroom	Project 1	Friday, June 5th, 2020 @ 4:42 PM	Friday, June 5th, 2020 @ 4:59 PM
80	Ned Land (ned)	CMP lab	Project 1	Monday, June 1st, 2020 @ 2:28 PM	Monday, June 8th, 2020 @ 3:00 PM
79	Captain Nemo (captain)	Cleanroom	Cleanroom Eng	Thursday, May 28th, 2020 @ 11:53 AM	Wednesday, June 10th, 2020 @ 4:00 PM
78	Captain Nemo (captain)	Cleanroom	Cleanroom Eng	Thursday, May 21st, 2020 @ 7:23 PM	Wednesday, May 27th, 2020 @ 7:09 PM
77	Ned Land (ned)	CMP lab	Project 1	Thursday, May 21st, 2020 @ 5:52 PM	Thursday, May 21st, 2020 @ 7:23 PM
76	Ned Land (ned)	Cleanroom	Project 1	Thursday, May 21st, 2020 @ 5:44 PM	Thursday, May 21st, 2020 @ 5:50 PM
75	Ned Land (ned)	Cleanroom	Project 1	Wednesday, May 13th, 2020 @ 5:33 PM	Wednesday, May 13th, 2020 @ 5:33 PM
74	Ned Land (ned)	Cleanroom	Project 1	Wednesday, May 13th, 2020 @ 5:23 PM	Wednesday, May 13th, 2020 @ 5:29 PM
73	Ned Land (ned)	CMP lab	Project 1	Wednesday, May 13th, 2020 @ 5:14 PM	Wednesday, May 13th, 2020 @ 5:22 PM
72	Ned Land (ned)	CMP lab	Project 1	Wednesday, May 13th, 2020 @ 5:05 PM	Wednesday, May 13th, 2020 @ 5:05 PM
71	Captain Nemo (captain)	Cleanroom	Cleanroom Maint	Wednesday, May 13th, 2020 @ 4:59 PM	Thursday, May 21st, 2020 @ 7:23 PM
70	Ned Land (ned)	Cleanroom	Project 2	Wednesday, May 13th, 2020 @ 4:58 PM	Wednesday, May 13th, 2020 @ 4:59 PM
69	Ned Land (ned)	Cleanroom	Project 1	Wednesday, May 13th, 2020 @ 4:23 PM	Wednesday, May 13th, 2020 @ 4:27 PM

Figure 43.15: *Area access records summary page*

43.7.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.16). In addition, the history button will show any manual changes that were made to the record.

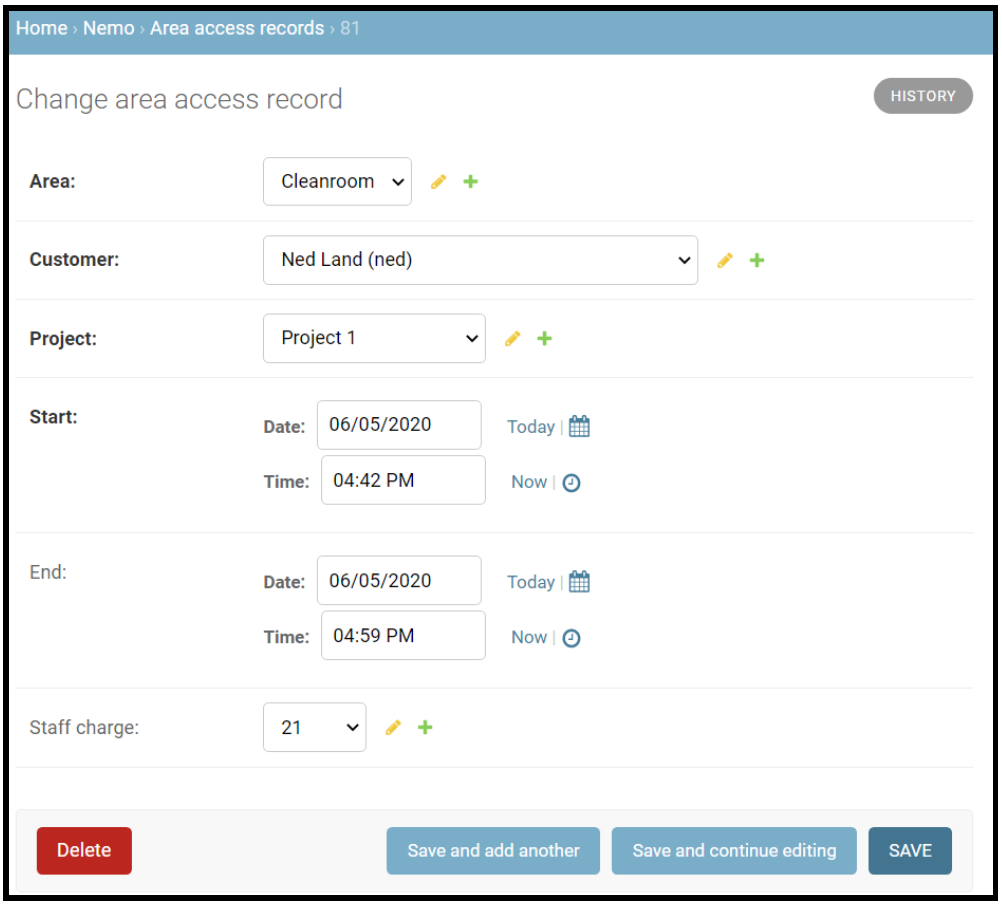


Figure 43.16: *Area access records add/edit page*

- Area – drop down list of all areas (required). Areas table
- Customer – drop down list of all users (required). Users table
- Project – drop down list of all projects (required). Projects table

- Start – the start date and time (required).
- End – the end date and time.
- Staff charge – the staff charge record id the area access record is associated with.

43.7.4 User access page

Area access records are automatically recorded when a user accesses a controlled area. Access is provided via the landing page by a user, the area access page by staff, or through a controlled door tablet. Areas are discussed in the next section.

43.8 Areas

43.8.1 Usage

The areas table contains the list of areas defined for a facility. Areas are optional and can be used to define spaces and group tools in common places. In addition, areas can optionally have occupancy limits set as well as require a reservation for access.

The times a user has access to an area are defined as physical access levels. Physical access levels are used to associate areas with time schedules and are discussed in the Detailed administration $\rightarrow$ Physical access level section 43.32.

An area can optionally have doors associated with it that NEMO controls through interlocks. Doors are discussed in the section 43.22.

User area access permissions are permissions to physical access levels and are discussed in the Users chapter 39.

Areas must be created and edited through accessing this table directly.

43.8.2 Summary Page

The summary page provides a list of areas (Figure 43.17). Click the area field in the row of interest to edit. If parent/child areas are used, clicking the expand tree button will list all children under a parent and clicking collapse tree will hide all children under a parent.

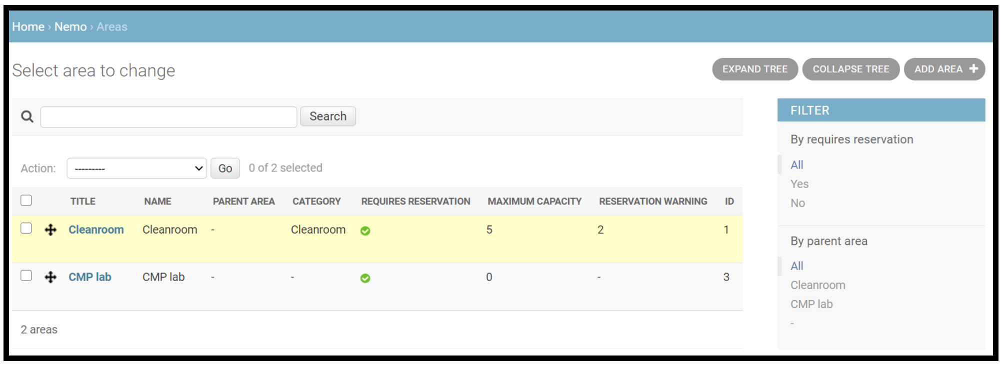


Figure 43.17: *Areas summary page*

43.8.3 Fields

The add/change page for this table lists the fields that can be edited. In addition, the history button will show any manual changes that were made to the record. The area table is listed in five sections that will be detailed below.

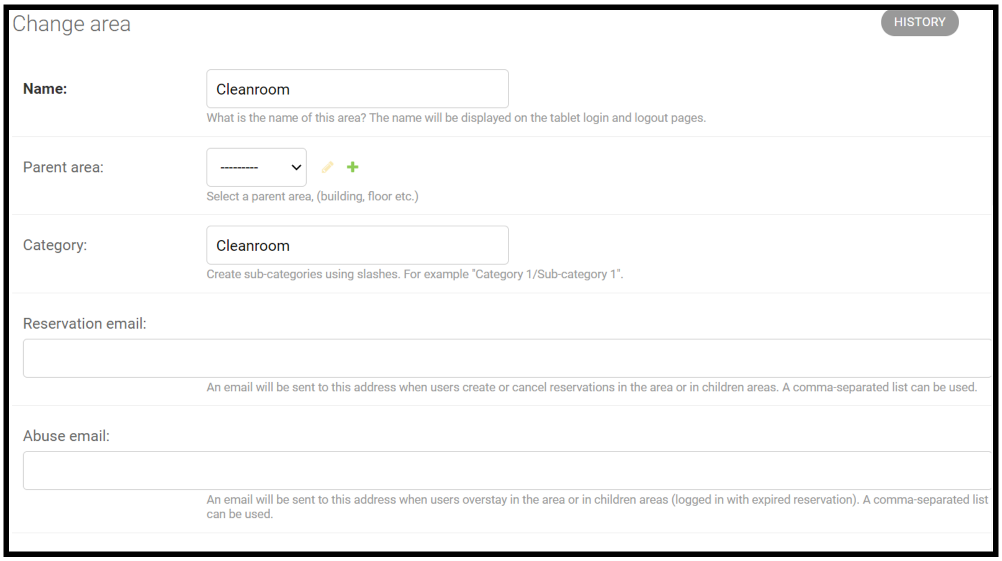


Figure 43.18: *Area general information*

- General Information (Figure 43.18)
  - Name – the name of the area, maximum 200 characters (required)
  - Parent area – if parent/child relationships are desired, select the parent area from the drop-down list.
  - Category – to organize areas on the calendar sidebar, categories can be created to group by. Optional
  - Reservation email – An email will be sent to this address when users create or cancel reservations in the area or in children areas. A comma-separated list can be used. Optional

- Abuse email – An email will be sent to this address when users overstay their reservation in the area or in children areas (logged in with expired reservation). A comma-separated list can be used. Optional

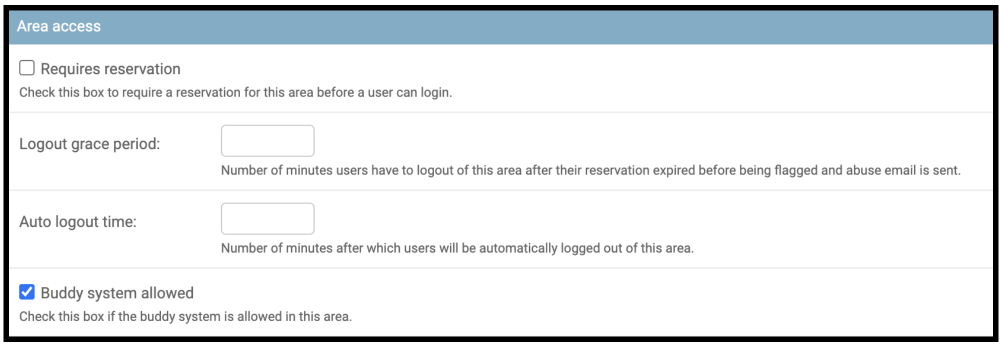


Figure 43.19: *Area access*

- Area access (Figure 43.19)
  - Requires reservation – check this box to require a reservation for this area before a user can login. Checking this box will cause this area to display on the calendar sidebar so it is accessible for reservations.
  - Logout grace period – number of minutes users have to logout of this area after their reservation expired before being flagged and abuse email is sent.
  - Auto logout time – number of minutes after which users will be automatically logged out of this area. This requires the timed service “Auto logout users” the be setup (see Section 54.3).
  - Buddy system allowed – this checkbox enables the buddy board for this area. The buddy board appears on the navigation bar and is described in the buddy board section.

Figure 43.20: *Area occupancy*

- Occupancy (Figure 43.20)
  - Maximum capacity – The maximum number of people allowed in this area at any given time. Set to 0 for unlimited. (required)
  - Count staff in occupancy ¬– Indicates that staff users will count towards maximum capacity. If not checked, staff occupancy will be listed separately on the status dashboard and jumbotron pages.
  - Count service personnel in occupancy – Indicates that service personnel will count towards maximum capacity. If not checked, service personnel occupancy will be listed separately on the status dashboard and jumbotron pages.
  - Reservation warning – The number of simultaneous users (with at least one reservation in this area) allowed before a warning is displayed when creating a reservation.

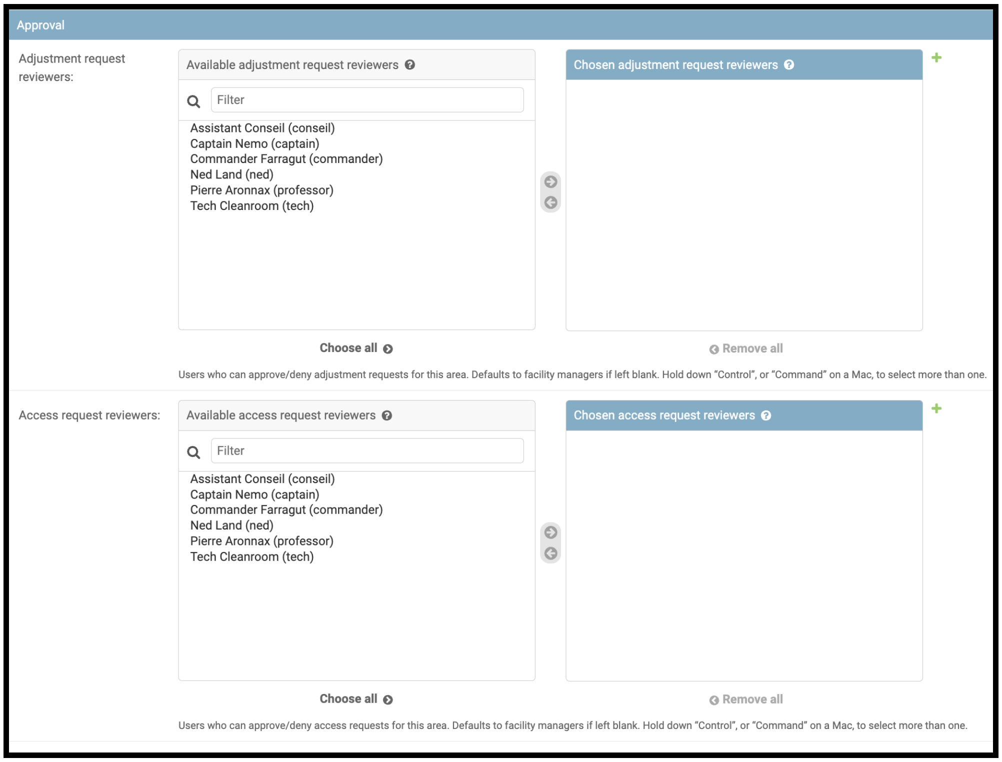


Figure 43.21: *Area requests approval*

- Approval (Figure 43.21):
  - Adjustment request reviewers – Select the list of users who can approve/deny adjustment requests for this area. If left blank, all users with the facility manager role can review adjustment requests for this area.
  - Access request reviewers – Select the list of users who can approve/deny access requests for this area. If left blank, all users with the facility manager role can review access requests for this area.

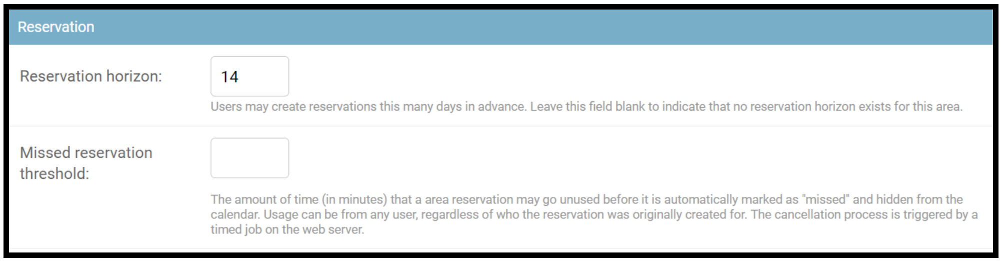


Figure 43.22: *Area reservation*

- Reservation (Figure 43.22) – these parameters are only applicable if the ‘requires reservation’ check box is checked
  - Reservation horizon – Users may create reservations this many days in advance. Leave this field blank to indicate that no reservation horizon exists for this area.
  - Missed reservation threshold – The amount of time (in minutes) that an area reservation may go unused before it is automatically marked as “missed” and hidden from the calendar. The cancellation process is triggered by a timed job on the web server.

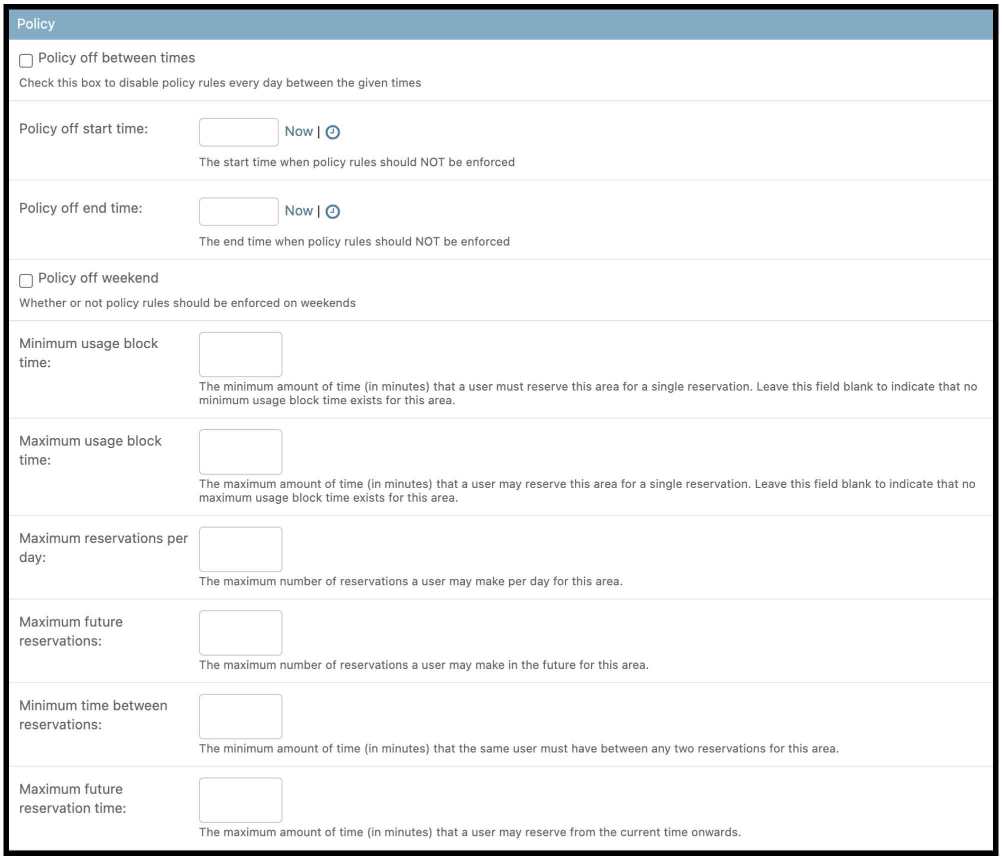


Figure 43.23: *Area policy*

- Policy (Figure 43.23) – these parameters are only applicable if the 'requires reservation' check box is checked.
  - Policy off between times – Check this box to disable policy rules every day between the given times
  - Policy off start time – The start time when policy rules should NOT be enforced
  - Policy off end time – The end time when policy rules should NOT be enforced

- Policy off weekend – Whether or not policy rules should be enforced on weekends
- Minimum usage block time – The minimum amount of time (in minutes) that a user must reserve this area for a single reservation. Leave this field blank to indicate that no minimum usage block time exists for this area.
- Maximum usage block time – The maximum amount of time (in minutes) that a user may reserve this area for a single reservation. Leave this field blank to indicate that no maximum usage block time exists for this area.
- Maximum reservations per day – The maximum number of reservations a user may make per day for this area.
- Maximum future reservations – The maximum number of reservations a user may have from the current time onwards.
- Minimum time between reservations – The minimum amount of time (in minutes) that the same user must have between any two reservations for this area.
- Maximum future reservation time – The maximum amount of time (in minutes) that a user may reserve from the current time onwards.

43.8.4 User access page

There are no user pages for creating areas. Accessing areas can be performed from the landing page if enabled, the area access page by staff, and the entrance tablets if used.

43.9 Badge readers

43.9.1 Usage

The badge reader table can be used to create custom badge reader behavior. The default behavior of NEMO is to expect the F2 character as the send key and the record key. It does not need to be explicitly defined but has been here to provide an example of how to record a new badge reader. When using the Kiosk or Area Access, add ?reader_id=<reader_id> to the URL to select a badge reader configuration.

43.9.2 Summary Page

The summary page provides a listing of badge readers (Figure 43.24). Click the id field in the row of interest to edit.

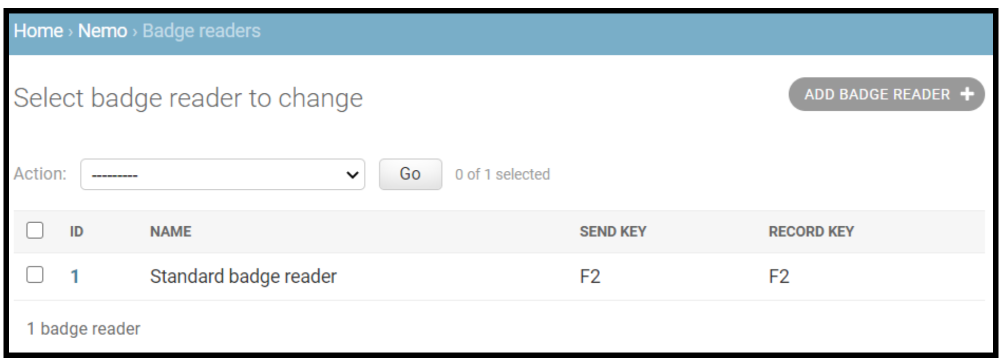


Figure 43.24: *Badge reader summary page*

43.9.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.25).

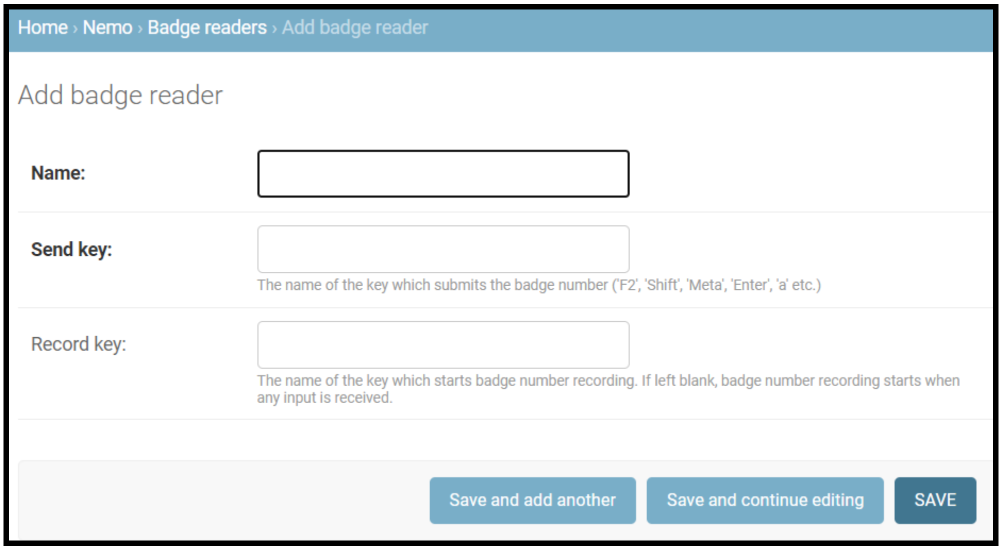


Figure 43.25: *Badge reader add/edit page*

- Name – the name can be up to 200 characters (required).
- Send key – The name of the key which submits the badge number (‘F2’, ‘Shift’, ‘Meta’, ‘Enter’, ‘a’ etc.) (required)
- Record key – The name of the key which starts badge number recording. If left blank, badge number recording starts when any input is received.

43.9.4 User access page

There are no user access pages associated with badge readers. When using the Kiosk or Area Access, add ?reader_id=<reader_id> to the URL to select a badge reader configuration.

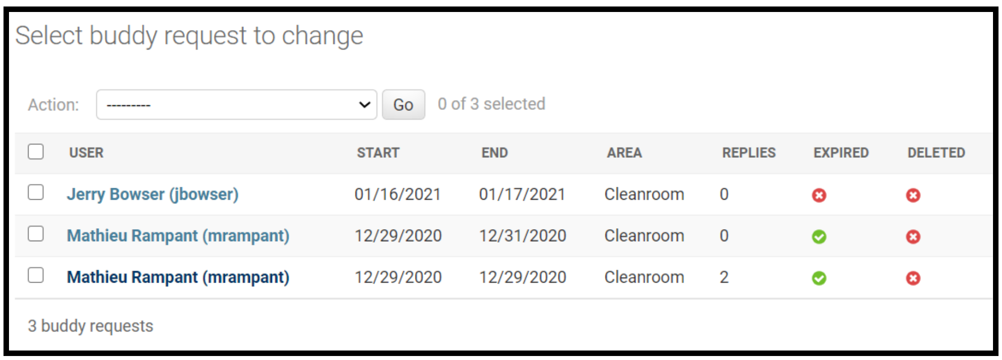
43.10 Buddy requests

43.10.1 Usage

The buddy requests table stores the requests entered on the buddy board feature, see section 8.1.

43.10.2 Summary Page

The summary page provides a listing of buddy requests (Figure 43.26). Click the user field in the row of interest to edit.



Select buddy request to change

Action: --------- Go 0 of 3 selected

USER	START	END	AREA	REPLIES	EXPIRED	DELETED
Jerry Bowser (jbowser)	01/16/2021	01/17/2021	Cleanroom	0		
Mathieu Rampant (mrampant)	12/29/2020	12/31/2020	Cleanroom	0		
Mathieu Rampant (mrampant)	12/29/2020	12/29/2020	Cleanroom	2		

3 buddy requests

Figure 43.26: *Buddy request summary page*

43.10.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.27).

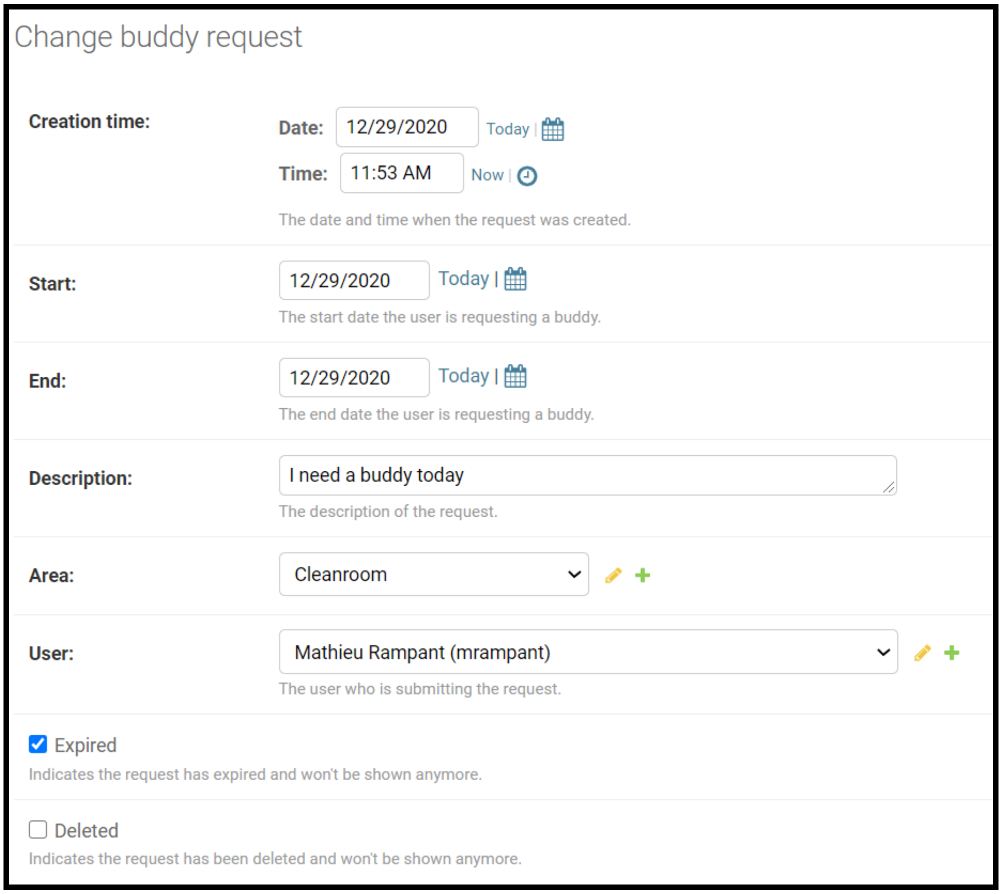


Figure 43.27: *Buddy request add/edit page*

- Creation time – use the dialog box or calendar/clock to select the creation date/time (required).
- Start – use the dialog box or calendar to select the start date (required).
- End – use the dialog box or calendar to select the end date (required).

- Description – dialog box to enter description of the buddy request (required).
- Area – select area from the drop down (required) (Areas Table).
- User – select user submitting request from the drop-down box (required) (Users Table).
- Expired – check box indicates if request has past end date and won't be displayed any longer.
- Deleted – check box indicates if request was deleted by user and won't be displayed any longer.

43.10.4 Buddy request message fields

The buddy request messages can be edited directly at the bottom of the buddy request form (Figure 43.28).

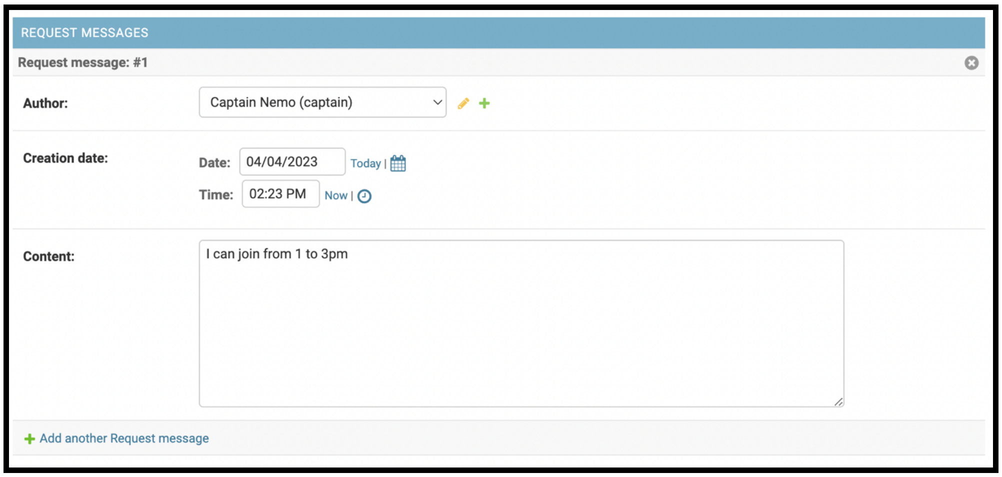


Figure 43.28: *Buddy request messages add/edit page*

- Author – select user submitting request from the drop-down box (required) (Users Table).
- Creation date – use the dialog box or calendar/clock to select the creation date/time (required).
- Content – dialog box to enter description of the buddy request (required).

43.10.5 User access page

Records are typically not edited or created directly in this view. There is a buddy board page for managing buddy requests, see section 8.1.

43.11 Chemical hazards

43.11.1 Usage

The chemical hazards table stores the chemical hazards used for the safety data sheets feature, see chapter 12.

43.11.2 Summary Page

The summary page provides a listing of chemical hazards (Figure 43.29). Click the name field in the row of interest to edit.

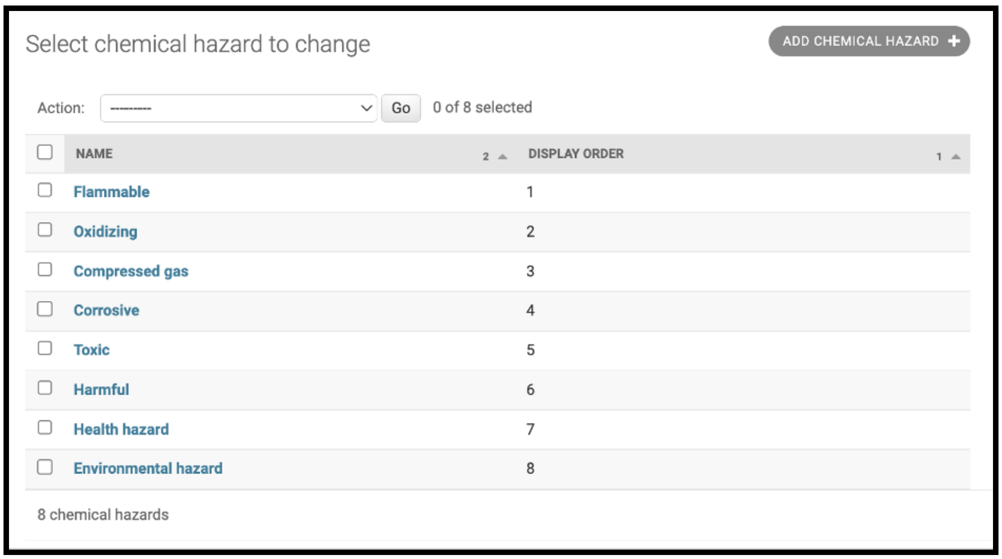


Figure 43.29: *Chemical hazard summary page*

43.11.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.30).

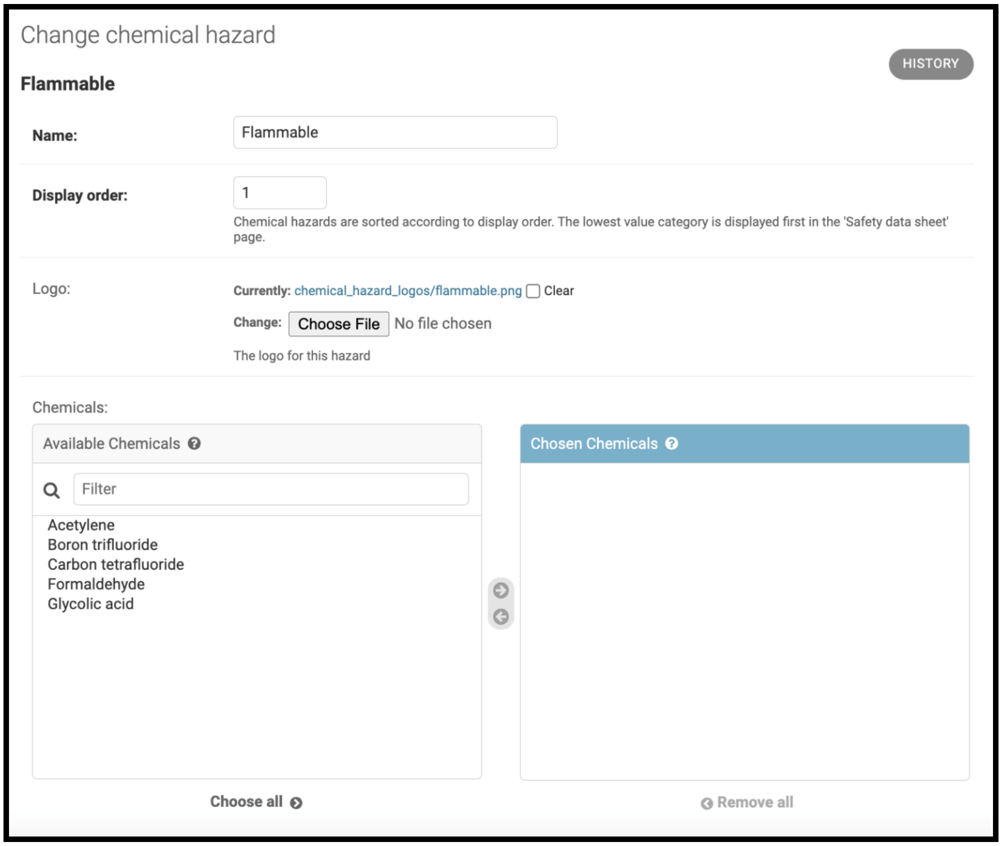


Figure 43.30: *Chemical hazard add/edit page*

- Name – use the input field to enter the name of the chemical hazard (required).
- Display order – use the dialog box or calendar to select the start date (required).
- Logo – use the “Choose File” button to upload a logo for this hazard.

Standard hazards logos can be found on the NEMO GitHub repository.

- Chemicals – use the multi selector to select chemicals that this hazard applies to. This can also be done from the Chemicals admin page, see section 43.12.

43.11.4 User access page

Chemical hazards are displayed in the Safety data sheets chapter 12.

43.12 Chemicals

43.12.1 Usage

The chemicals table stores the chemical used in the safety data sheets feature, see chapter 12.

43.12.2 Summary Page

The summary page provides a listing of chemicals (Figure 43.31). Click the name field in the row of interest to edit.

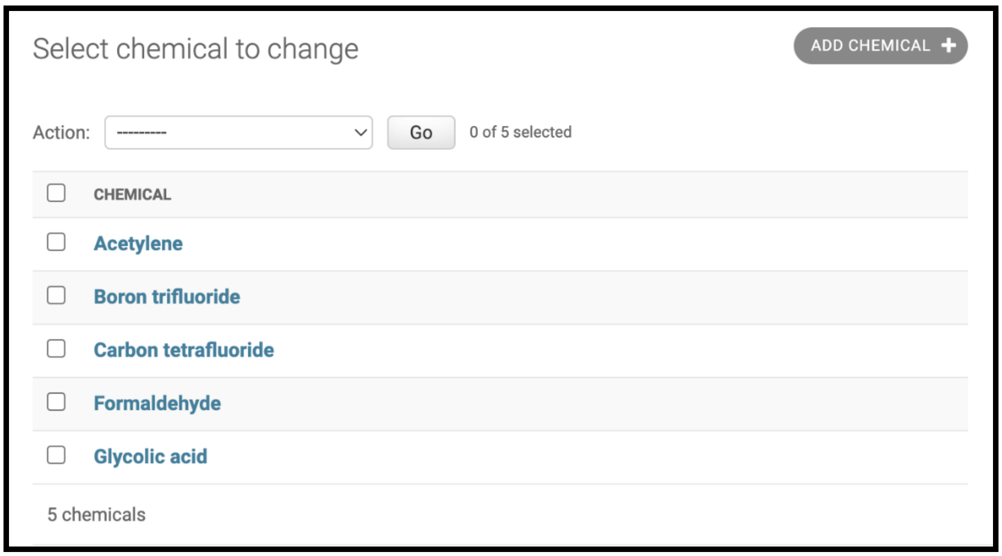


Figure 43.31: *Chemical summary page*

43.12.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.32).

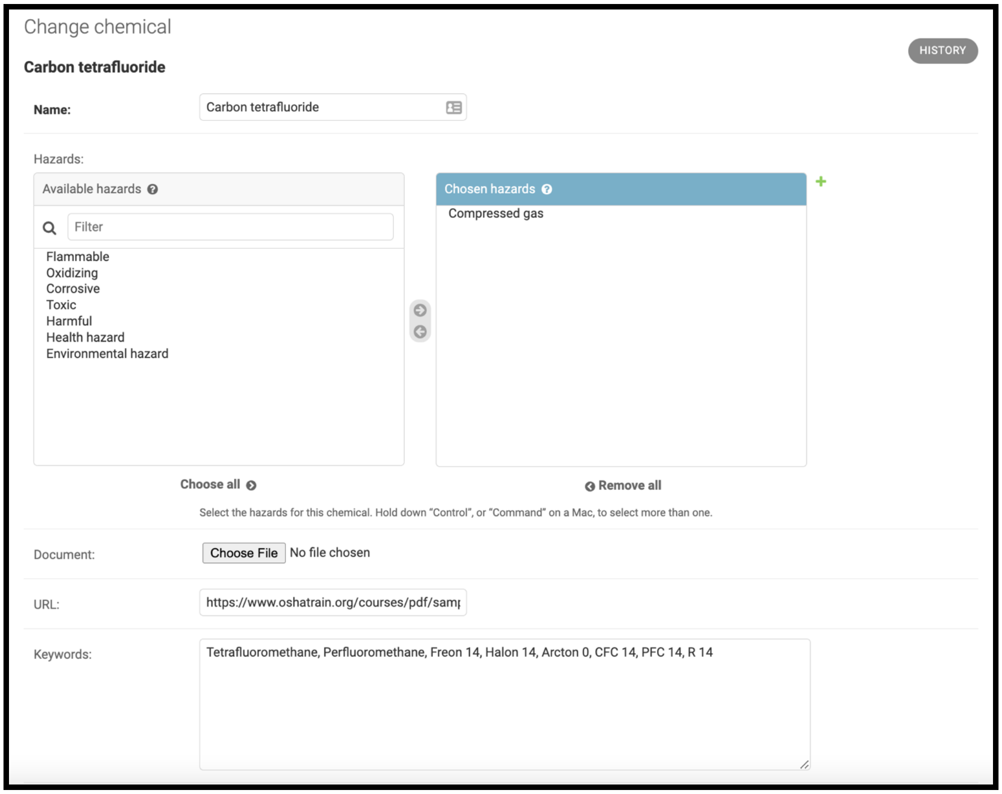


Figure 43.32: *Chemical add/edit page*

- Name – use the input field to enter the name of the chemical (required).
- Hazards – use the multi selector to select hazards for this chemical.
- Document – use the “Choose file” button to upload a document for this chemical.
- URL – alternatively, a URL link can be entered for the document.

- Keywords – use the dialog box to enter a list of keywords that can be used in the search feature of the Safety data sheets page.

43.12.4 User access page

Chemicals are displayed in the Safety data sheets chapter 12.

43.13 Closures

43.13.1 Usage

The closures table is used to records facility closures and override physical access level schedules to prevent access during the times defined. This feature is useful for creating holiday schedules and planned closures. During a physical access exception period, the selected physical access levels are not accessible to users.

43.13.2 Summary Page

The summary page provides a listing of closures (Figure 43.33). Click the name field in the row of interest to edit.

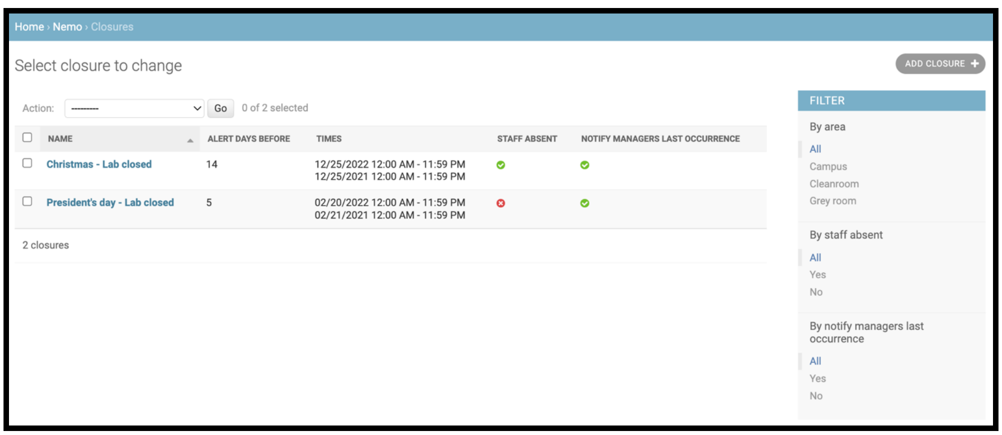


Figure 43.33: *Closures summary page*

43.13.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.34, Figure 43.36).

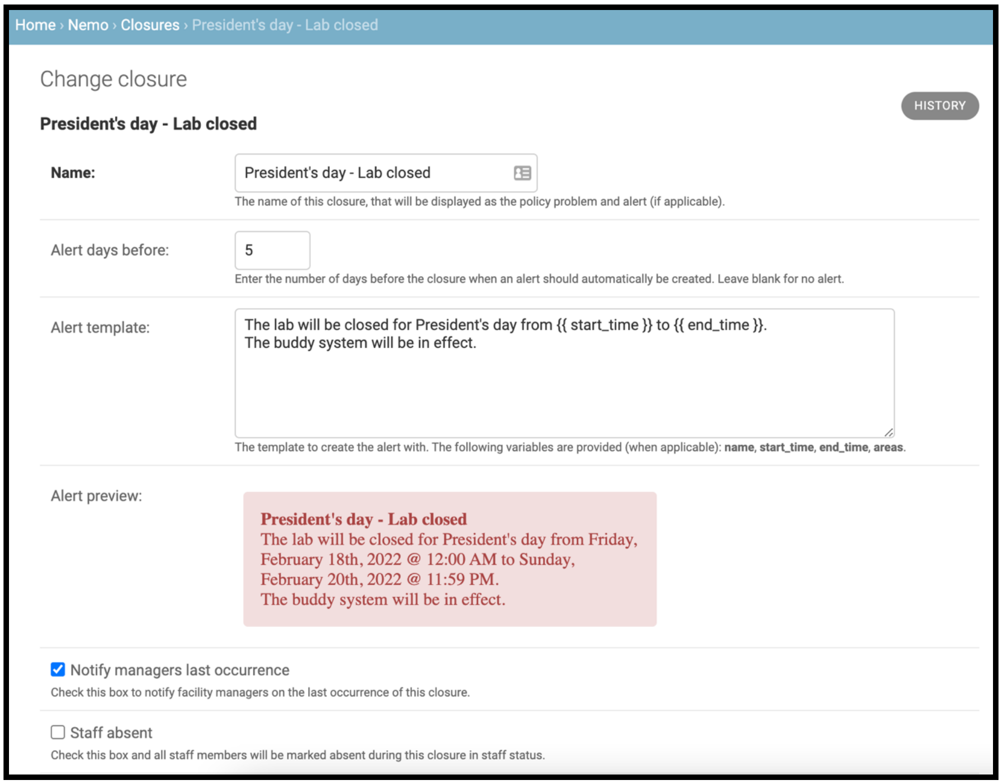


Figure 43.34: *Closures add/edit page 1*

- Name – descriptive name of the closure. This field is displayed in the message to users if someone tries to enter the area during the selected time (Figure 43.35) (required)

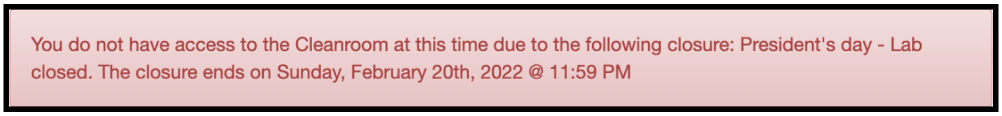


Figure 43.35: *Closures message*

- Alert days before – number of days before the closure that the automatic alert should be shown. Setting this field to any value other than blank will trigger the automatic alert creation, if the “Create closure alerts” timed service is set. See NEMO Timed Services section 54.3 for more information.
- Alert template – template message used for the alert. 4 variables can be used in the template: name, start_time, end_time and areas (unique areas from physical access levels). This field is required if “Alert days before” is set.
- Alert preview – preview of the alert if an alert template is provided. To display the preview, after providing an alert template click on “Save and continue editing”.
- Notify managers last occurrence – check this box to make sure facility managers get a reminder email on the last occurrence of this closure. This feature is particularly useful when setting multiple dates in advance, for example Christmas dates for the next 5 years, managers will be notified on the last one 5 years from now, so they can remember to go add more dates. The “Create closure alerts” timed service need to be set for this to work. See NEMO Timed Services section 54.3 for more information.

- Staff absent – check this box and all staff will be marked absent on the staff status page and the status will show "Closed". See Staff status section 7.4.

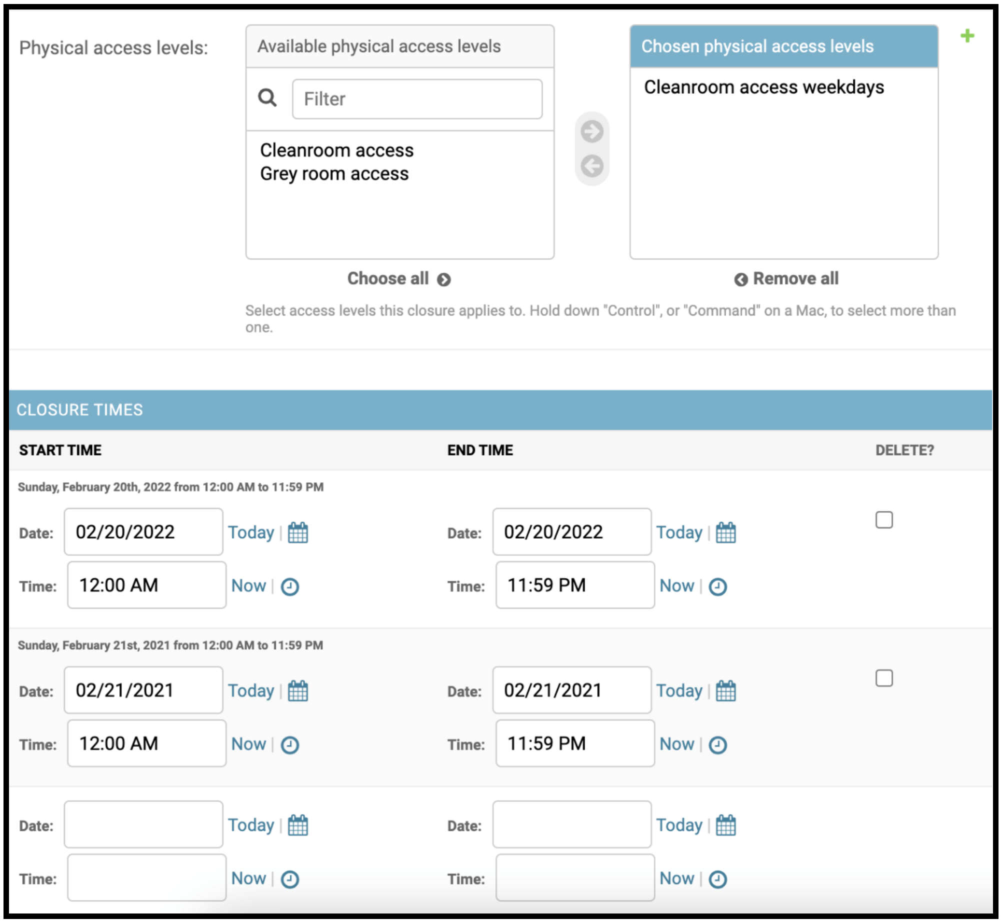


Figure 43.36: *Closures page 2*

- Physical access levels – select available physical access levels that the exception will apply to and use the right arrow to add to the chosen users list. Multiple physical access levels can be selected using the control or shift keys.

- Closure times (at least 1 required):
  - Start time – enter a start time for the closure.
  - End time – enter an end time for the closure.

43.13.4 User access page

There is no user page available to create facility closures. Once created, users with the selected physical access level will not be able to access the associated area during the closure window.

43.14 Comments

43.14.1 Usage

The comments table is used to store comments entered on the tool pages and should not normally need to be directly edited. Comments are entered on the post a comment tab of the tool control page, see section 6.9. The comment history for a tool can be viewed on the details tab of the tool control page, see subsection 6.5.7.

43.14.2 Summary Page

The summary page provides a listing of comments (Figure 43.37). Click the id field in the row of interest to edit.

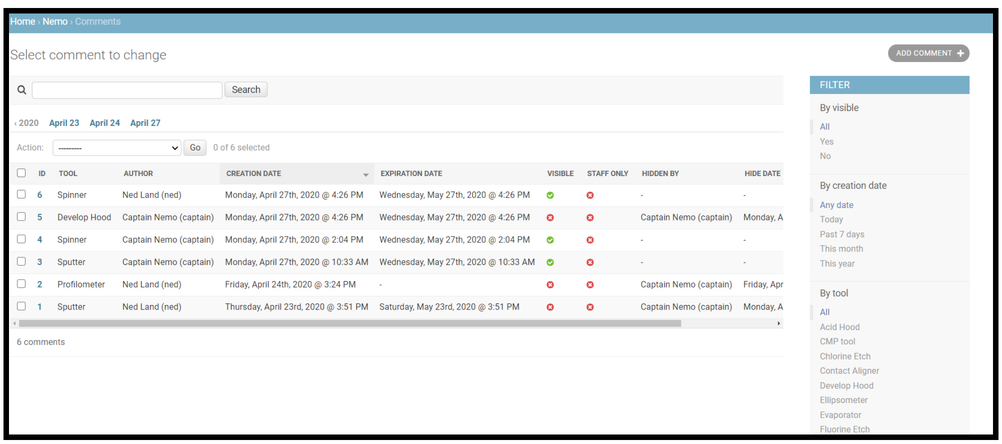


Figure 43.37: *Comments summary page*

43.14.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.38).

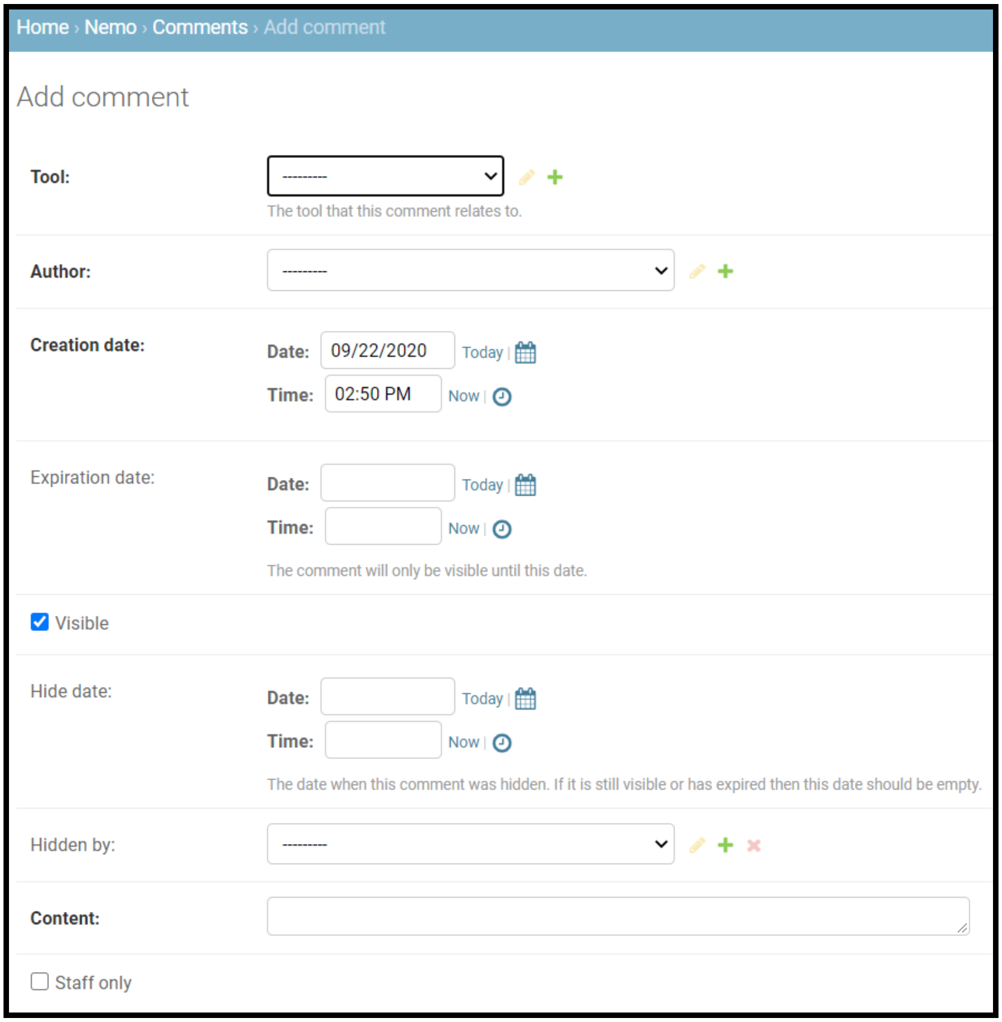


Figure 43.38: *Comments add/edit page*

- Tool – select the tool this comment relates to from the drop-down list (required). Tools table.

- Author – select the user name from the drop-down list (required). Users table.
- Creation date – use the dialog box or calendar/clock to select the creation date/time (required).
- Expiration date – use the dialog box or calendar/clock to select the expiration date/time for the comment. After the expiration date/time, the comment will no longer be visible.
- Visible – check box to indicate if the comment is visible on the tool summary page it pertains to.
- Hide date – use the dialog box or calendar/clock to select the expiration date/time for the comment. After the hide date/time, the comment will no longer be visible.
- Hidden by – select the user name from the drop-down list. Users table.
- Staff only – check box to indicate that comment will only be visible to staff. This is useful for listing restart procedures or other information that users should not have access to.

43.14.4 User access page

Comments are entered on the post a comment tab of the tool control page, see section 6.9. The comment history for a tool can be viewed on the details tab of the tool control page, see section 6.7.

43.15 Configuration histories

43.15.1 Usage

The configurations histories table is used to store tool configurations for each configurable tool. The configuration can be selected when a reservation is made, staff update the configuration when the tool is setup for the user, and the history can be viewed from the config history tab of the tool control page, see subsection 6.5.7.

43.15.2 Summary Page

The summary page provides a listing of configuration histories (Figure 43.39). Click the id field in the row of interest to edit.

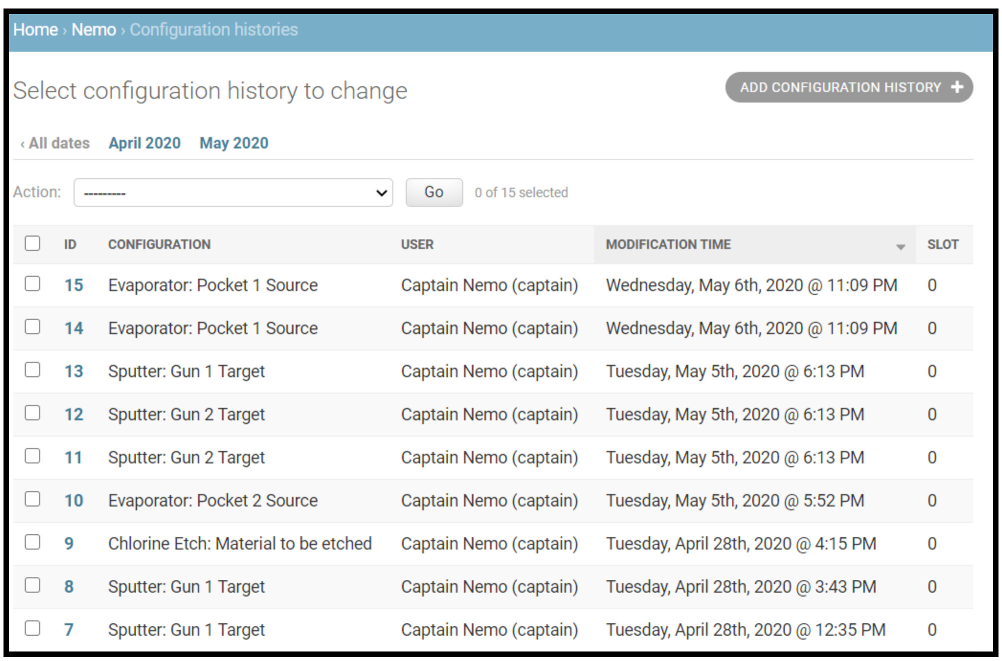


Figure 43.39: *Configuration histories summary page*

43.15.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.40).

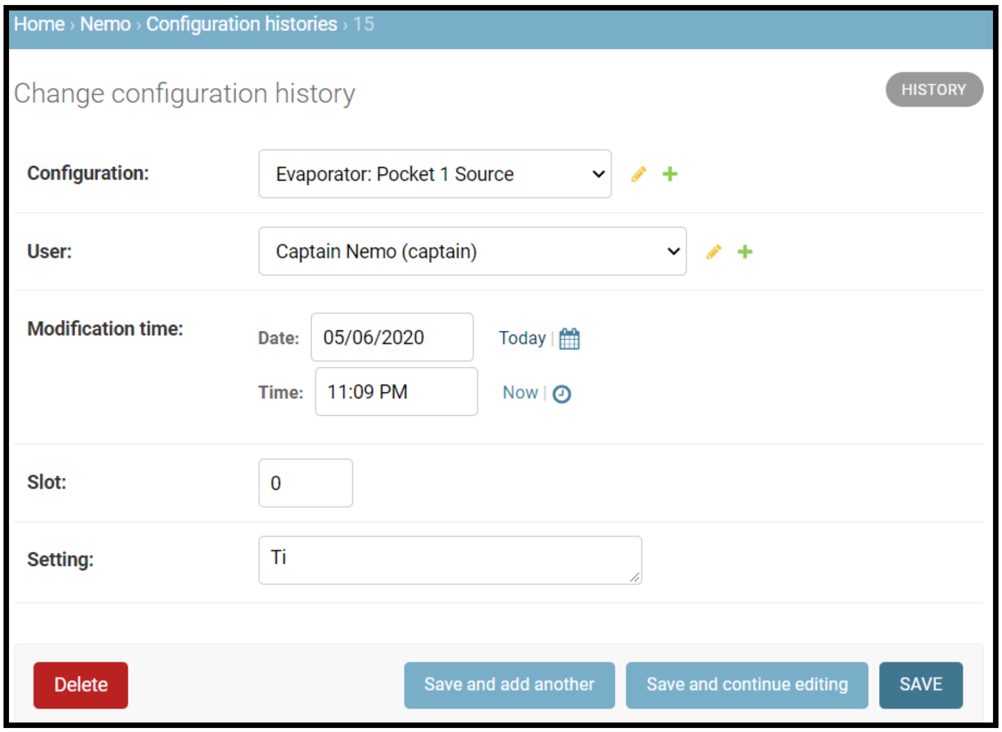


Figure 43.40: *Configuration histories add/edit page*

- Configuration – select the configuration from the drop-down list. (required) Configurations table.
- User – select the user name from the drop-down list (required). Users table.
- Modification time – use the dialog box or calendar/clock to select the creation date/time (required).
- Slot – indicates where the configuration will go.

- Setting – the specific item to be used for the configuration.

43.15.4 User access page

Configurations are created in the configurations table section 43.16. The configuration of a tool can be changed, updated, and viewed on several pages of NEMO. The configuration can be selected when a reservation is made, staff update the configuration when the tool is setup for the user, and the history can be viewed from the config history tab of the tool control page, see subsection 6.5.7.

43.16 Configurations

43.16.1 Usage

The configurations histories table is used to store tool configurations for each configurable tool. The configuration can be selected when a reservation is made, staff update the configuration when the tool is setup for the user, and the history can be viewed from the config history tab of the tool control page, see subsection 6.5.7.

43.16.2 Summary Page

The summary page provides a listing of configurations (Figure 43.41). Click the id field in the row of interest to edit.

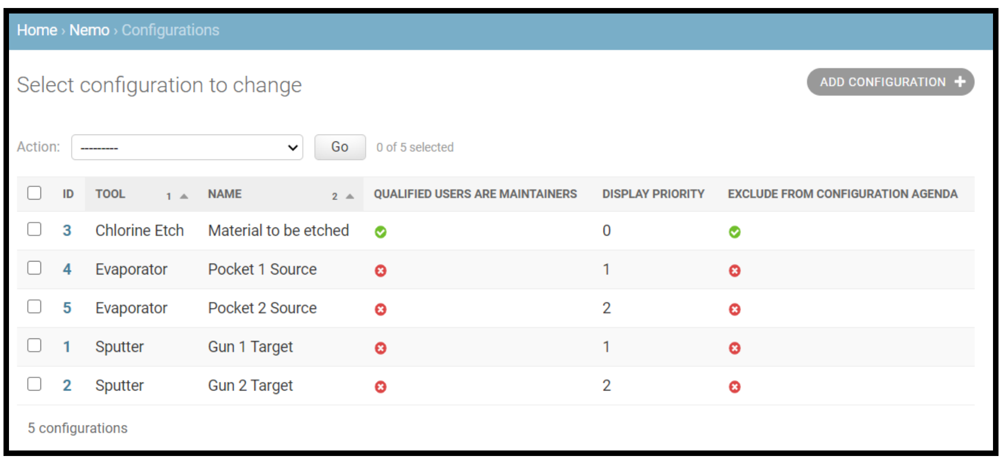


Figure 43.41: *Configurations summary page*

43.16.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.42, Figure 43.43).

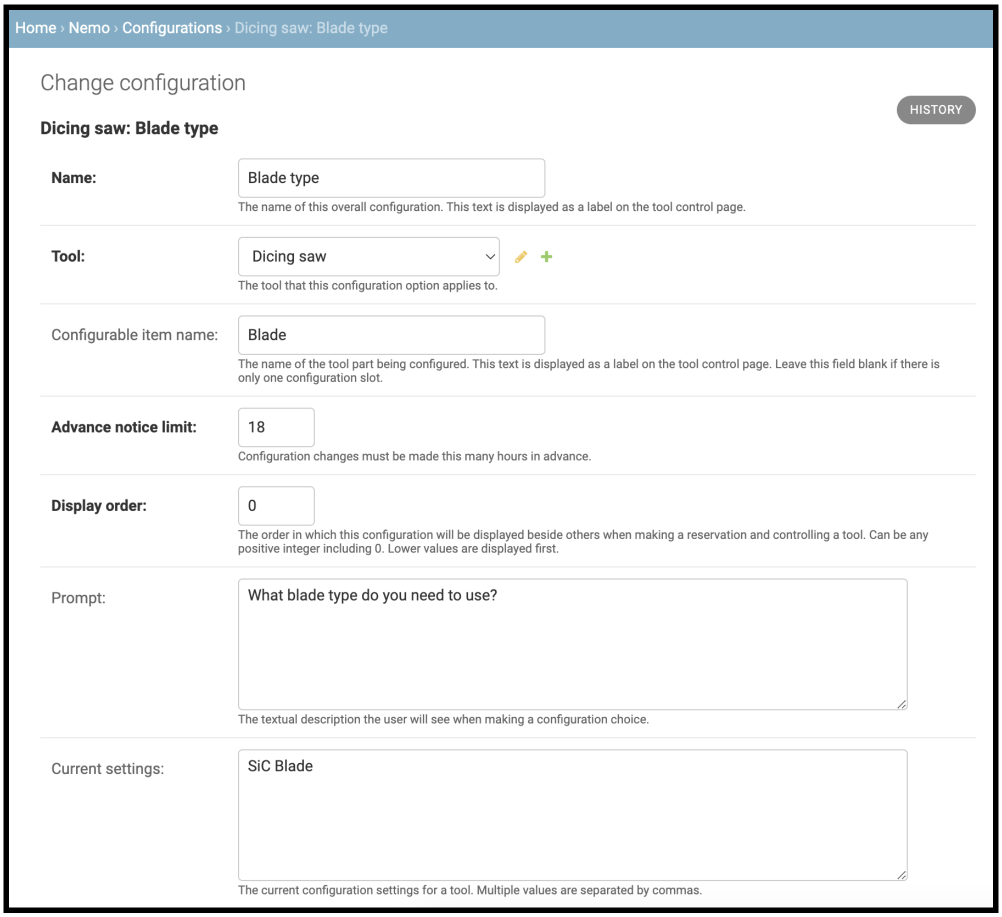


Figure 43.42: *Configurations add/edit page part 1*

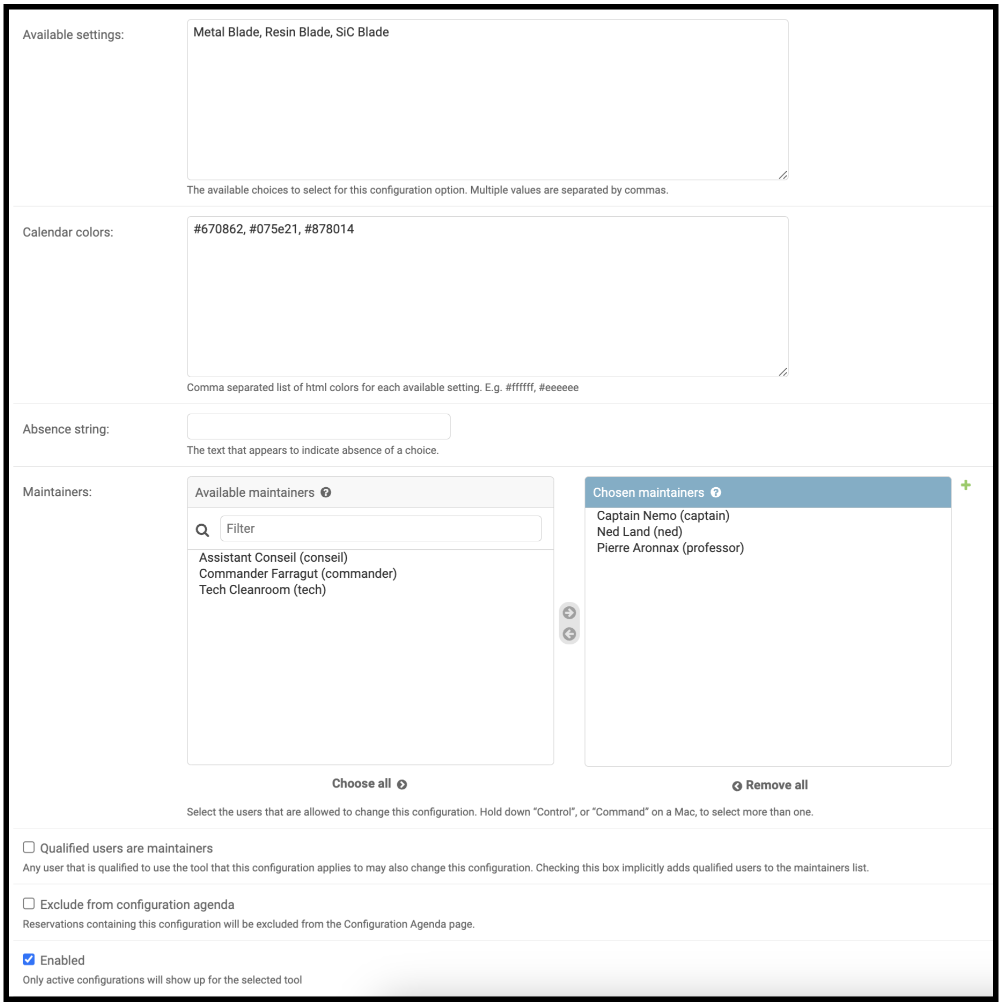


Figure 43.43: *Configurations add/edit page part 2*

- Name – The name of this overall configuration. This text is displayed as a label on the tool control page. (required).
- Tool – The tool that this configuration option applies to selected from the drop-down list. (required) Tools table.
- Configurable item name – The name of the tool part being configured. This text is displayed as a label on the tool control page. Leave this field

blank if there is only one configuration slot.

- Advance notice limit – Configuration changes must be made this many hours in advance or the user will be prompted that the configuration may not be done in time. (required).
- Display order – The order in which this configuration will be displayed beside others when making a reservation and controlling a tool. Can be any positive integer including 0. Lower values are displayed first. (required).
- Prompt – The textual description the user will see when making a configuration choice.
- Current settings – The current configuration settings for a tool. Multiple values are separated by commas.
- Available settings – The available choices to select for this configuration option. Multiple values are separated by commas.
- Calendar colors – Comma separated list of HTML colors for each available setting. E.g. #ffffff, #eeeeee.
- Absence string – The text that appears to indicate absence of a choice.
- Maintainers – Select the users that are allowed to change this configuration. Hold down "Control", or "Command" on a Mac, to select more than one. Users table.
- Qualified users are maintainers – Any user that is qualified to use the tool that this configuration applies to may also change this configuration. Checking this box implicitly adds qualified users to the maintainers list.
- Exclude from configuration agenda – Reservations containing this configuration will be excluded from the Configuration Agenda page.

- Enabled – Enable/disable the configuration. If disabled, it will not show up in the tool control or in the Configuration Agenda page.

43.16.4 User access page

The configuration of a tool can be changed, updated, and viewed on several pages of NEMO. The configuration can be selected when a reservation is made, staff update the configuration when the tool is setup for the user, and the history can be viewed from the config history tab of the tool control page, see subsection 6.5.7.

43.17 Consumable categories

43.17.1 Usage

Consumable categories are optional but can be useful for binning consumables so they can be displayed in logical groups. Consumable categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no consumable categories are defined, all consumables will be listed in alphabetical order. Consumable categories are discussed in the Supplies chapter 35.

43.17.2 Summary Page

The summary page provides a listing of consumable supply categories (Figure 43.44). Click the name field in the row of interest to edit.

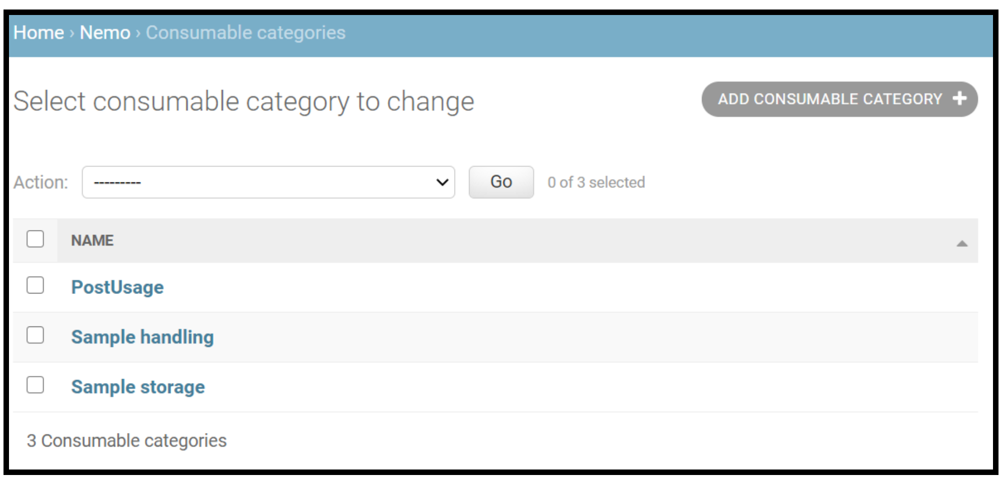


Figure 43.44: *Consumable category summary page*

43.17.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.45).

Figure 43.45: *Consumable category add/edit page*

- Name – the name can be up to 200 characters (required).

43.17.4 User access page

Consumable categories are discussed in the Supplies chapter 35.

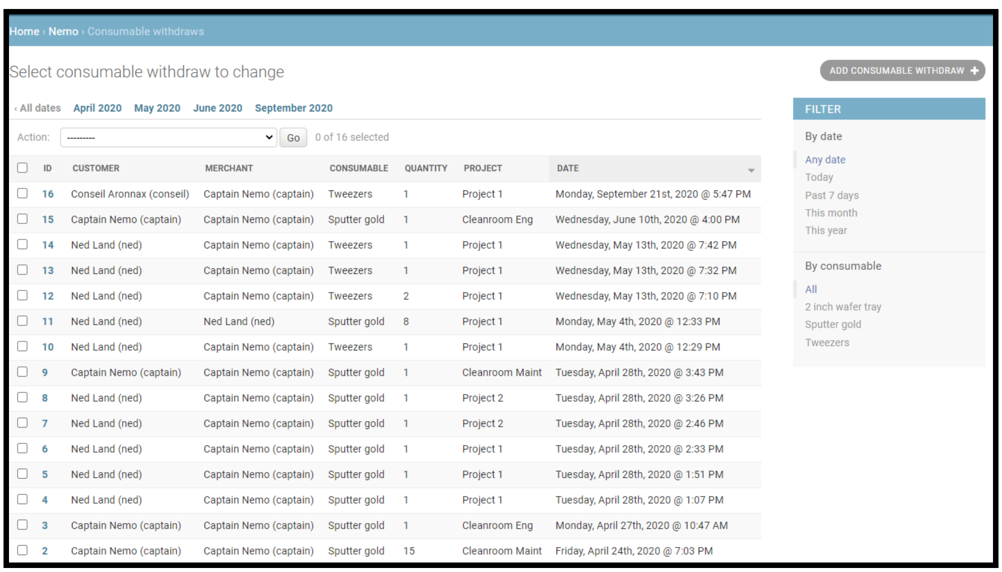
43.18 Consumable withdraws

43.18.1 Usage

The consumable withdraws records table maintains the list of consumable or supply items that have been distributed to users either manually by staff or automatically by tool usage. Records are written automatically when a staff member checks out a supply, or a consumable withdraw is initiated by a tool pre/post usage question. Normally, this table will not require manual editing unless an incorrect quantity is entered.

43.18.2 Summary Page

The summary page provides date filtering, filtering by consumable, and by start date (Figure 43.46). Click the id field in the row of interest to edit.



ID	CUSTOMER	MERCHANT	CONSUMABLE	QUANTITY	PROJECT	DATE
16	Conseil Aronnax (conseil)	Captain Nemo (captain)	Tweezers	1	Project 1	Monday, September 21st, 2020 @ 5:47 PM
15	Captain Nemo (captain)	Captain Nemo (captain)	Sputter gold	1	Cleanroom Eng	Wednesday, June 10th, 2020 @ 4:00 PM
14	Ned Land (ned)	Captain Nemo (captain)	Tweezers	1	Project 1	Wednesday, May 13th, 2020 @ 7:42 PM
13	Ned Land (ned)	Captain Nemo (captain)	Tweezers	1	Project 1	Wednesday, May 13th, 2020 @ 7:32 PM
12	Ned Land (ned)	Captain Nemo (captain)	Tweezers	2	Project 1	Wednesday, May 13th, 2020 @ 7:10 PM
11	Ned Land (ned)	Ned Land (ned)	Sputter gold	8	Project 1	Monday, May 4th, 2020 @ 12:33 PM
10	Ned Land (ned)	Captain Nemo (captain)	Tweezers	1	Project 1	Monday, May 4th, 2020 @ 12:29 PM
9	Captain Nemo (captain)	Captain Nemo (captain)	Sputter gold	1	Cleanroom Maint	Tuesday, April 28th, 2020 @ 3:43 PM
8	Ned Land (ned)	Captain Nemo (captain)	Sputter gold	1	Project 2	Tuesday, April 28th, 2020 @ 3:26 PM
7	Ned Land (ned)	Captain Nemo (captain)	Sputter gold	1	Project 2	Tuesday, April 28th, 2020 @ 2:46 PM
6	Ned Land (ned)	Captain Nemo (captain)	Sputter gold	1	Project 1	Tuesday, April 28th, 2020 @ 2:33 PM
5	Ned Land (ned)	Captain Nemo (captain)	Sputter gold	1	Project 1	Tuesday, April 28th, 2020 @ 1:51 PM
4	Ned Land (ned)	Captain Nemo (captain)	Sputter gold	1	Project 1	Tuesday, April 28th, 2020 @ 1:07 PM
3	Captain Nemo (captain)	Captain Nemo (captain)	Sputter gold	1	Cleanroom Eng	Monday, April 27th, 2020 @ 10:47 AM
2	Captain Nemo (captain)	Captain Nemo (captain)	Sputter gold	15	Cleanroom Maint	Friday, April 24th, 2020 @ 7:03 PM

Figure 43.46: *Consumable withdraws summary page*

43.18.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.47). In addition, the history button will show any manual changes that were made to the record.

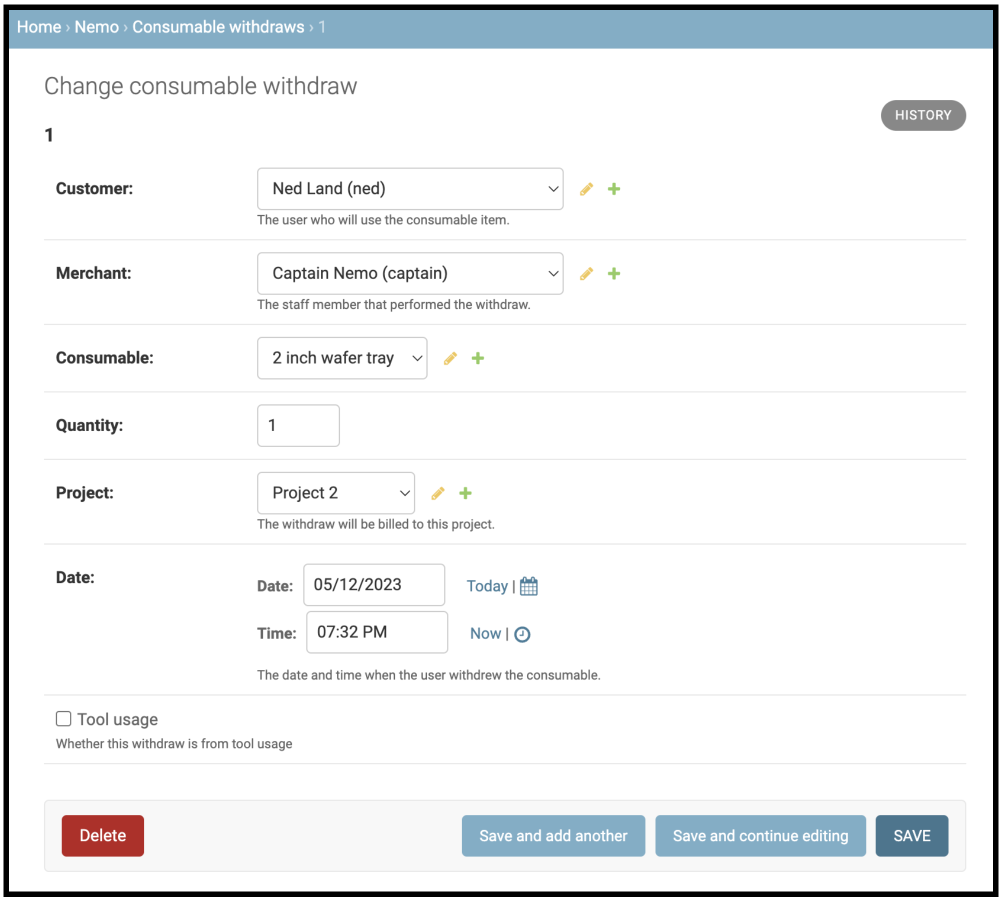


Figure 43.47: *Consumable withdraws add/edit page*

- Customer – The user who will use the consumable item. (required) Users table.
- Merchant – The staff member that performed the withdraw. (required) Users table.

- Consumable – Select the consumable from the drop-down list. (required) Consumables table.
- Quantity – The integer number quantity provided (required).
- Project – The withdraw will be billed to this project. (required) Projects table.
- Date – Use the dialog box or calendar/clock to select the creation date/-time (required).
- Tool usage – This box will be automatically checked when this withdrawal is from tool usage questions

43.18.4 User access page

Records are written automatically when a staff member checks out a supply to a user, or a consumable withdraw is initiated by a tool pre/post usage question. See Supplies in chapter 35.

43.19 Consumables

43.19.1 Usage

The consumables can be defined as items manually distributable by staff to users or items automatically distributed to users triggered by tool usage. The total quantity in stock can be tracked and messages automatically sent to the responsible person at a set threshold.

43.19.2 Summary Page

The summary page provides date filtering, filtering by visibility and consumable (Figure 43.48). Click the name field in the row of interest to edit.

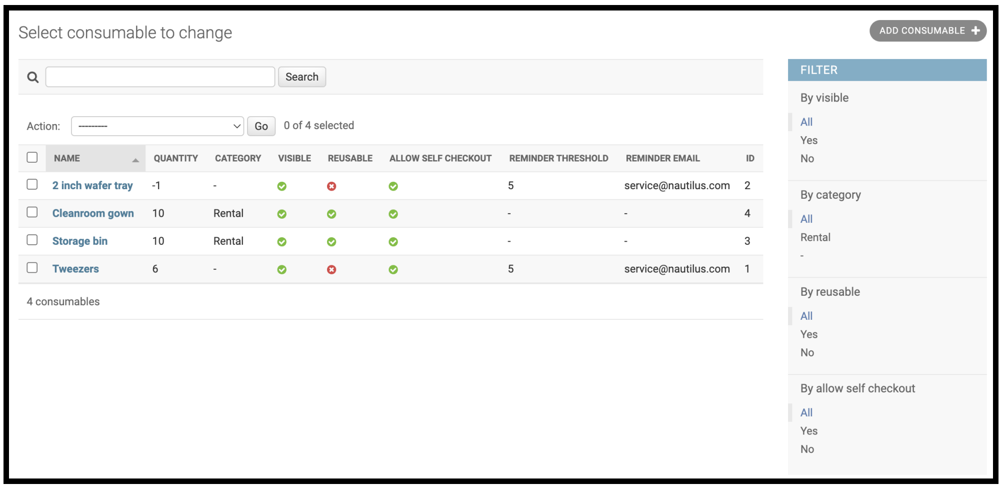


Figure 43.48: *Consumables summary page*

43.19.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.49). In addition, the history button will show any manual changes that were made to the record.

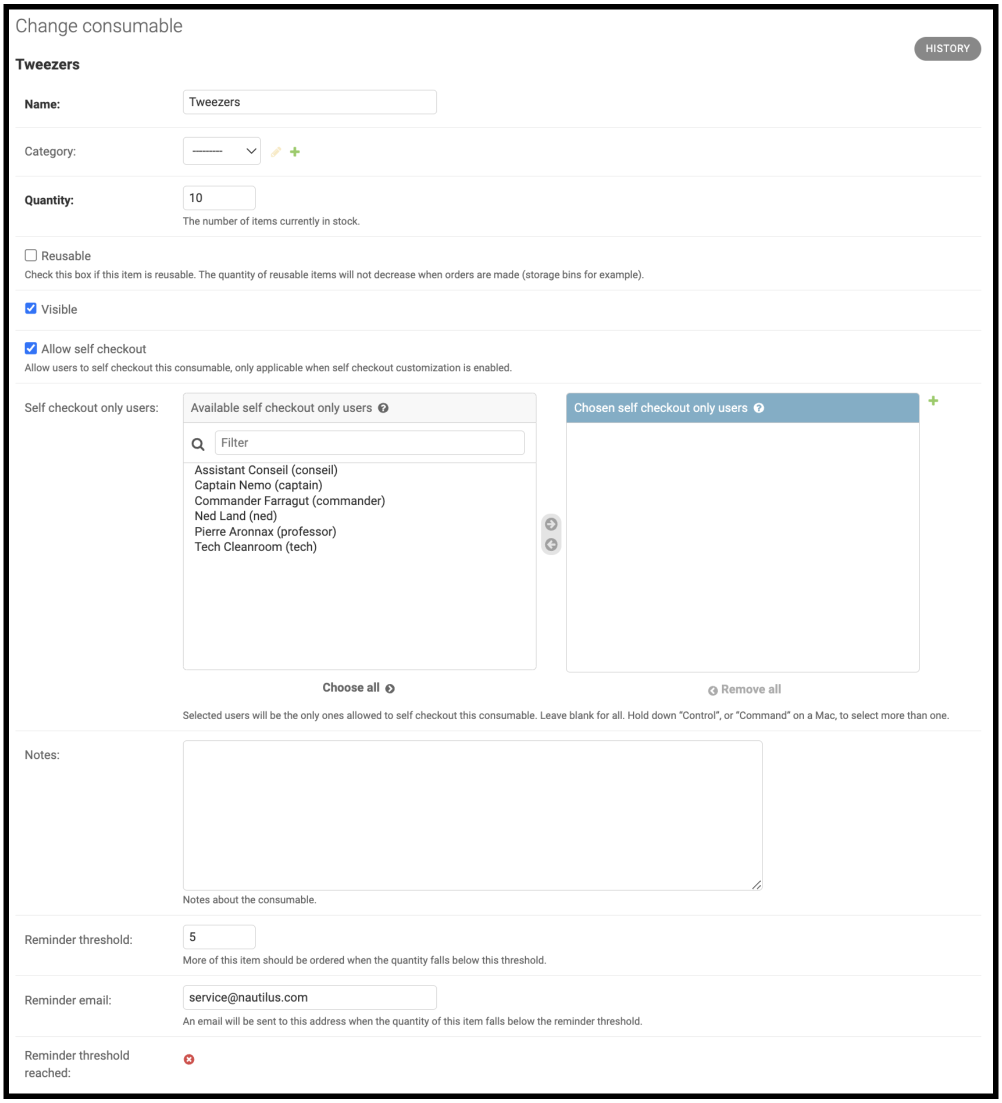


Figure 43.49: *Consumables add/edit page*

- Name – Name of the consumable (required).
- Category – Select a category from the drop-down list.
- Quantity – The integer number of items currently in stock (required).
- Reusable – Checkbox to indicate if then item is reusable. Reusable items quantity never decreases.
- Visible – Checkbox to indicate if the item is on the supply list. This is usually unchecked for items automatically distributed based on tool usage.
- Allow self checkout – Checkbox to indicate if regular users can self-checkout this item. Only applies when the self-checkout feature is enabled.
- Self checkout only users - Limit which users are allowed to self checkout this consumable.
- Notes – Additional notes to display about this consumable.
- Reminder threshold – The quantity at which a restock reminder email should be sent.
- Reminder email – The email address of the person responsible for ordering additional stock.
- Reminder threshold reached – Indicator if stock is below reminder threshold (not user settable).

43.19.4 User access page

There is no page for creating or maintaining consumables, it must be done on this page. However, quantity records are updated automatically when a staff member checks out a supply to a user, or a consumable withdraw is initiated by a tool pre/post usage question.

43.20 Contact information

43.20.1 Usage

Contact information can provide users information about how to find a staff member when needed. Contact information, if used, must be created in this table view. Any number can be defined. In addition, contacts can be associated with NEMO users to provide additional contact information on the tool detail pages. Contact information is discussed in the contact staff section 15.

43.20.2 Summary Page

The summary page provides a listing of contacts (Figure 43.50). Click the name field in the row of interest to edit.

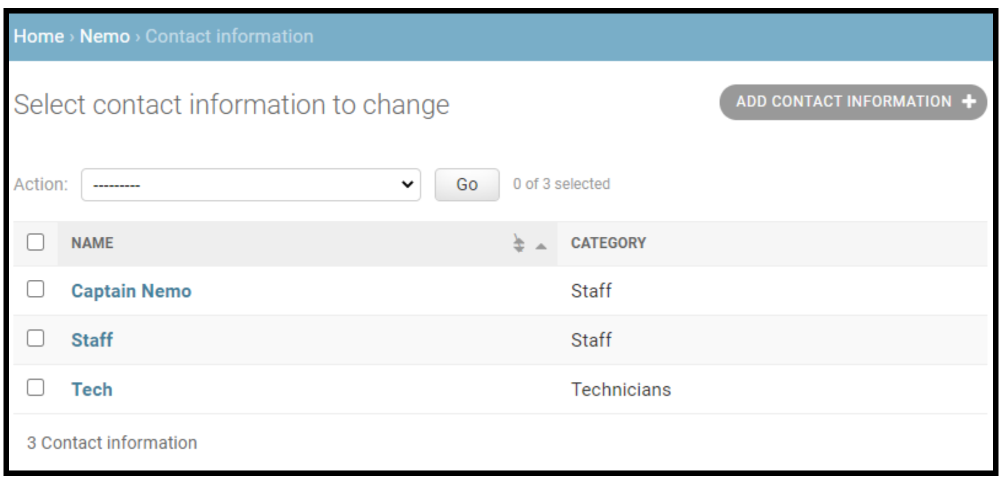


Figure 43.50: *Contact information summary page*

43.20.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.51).

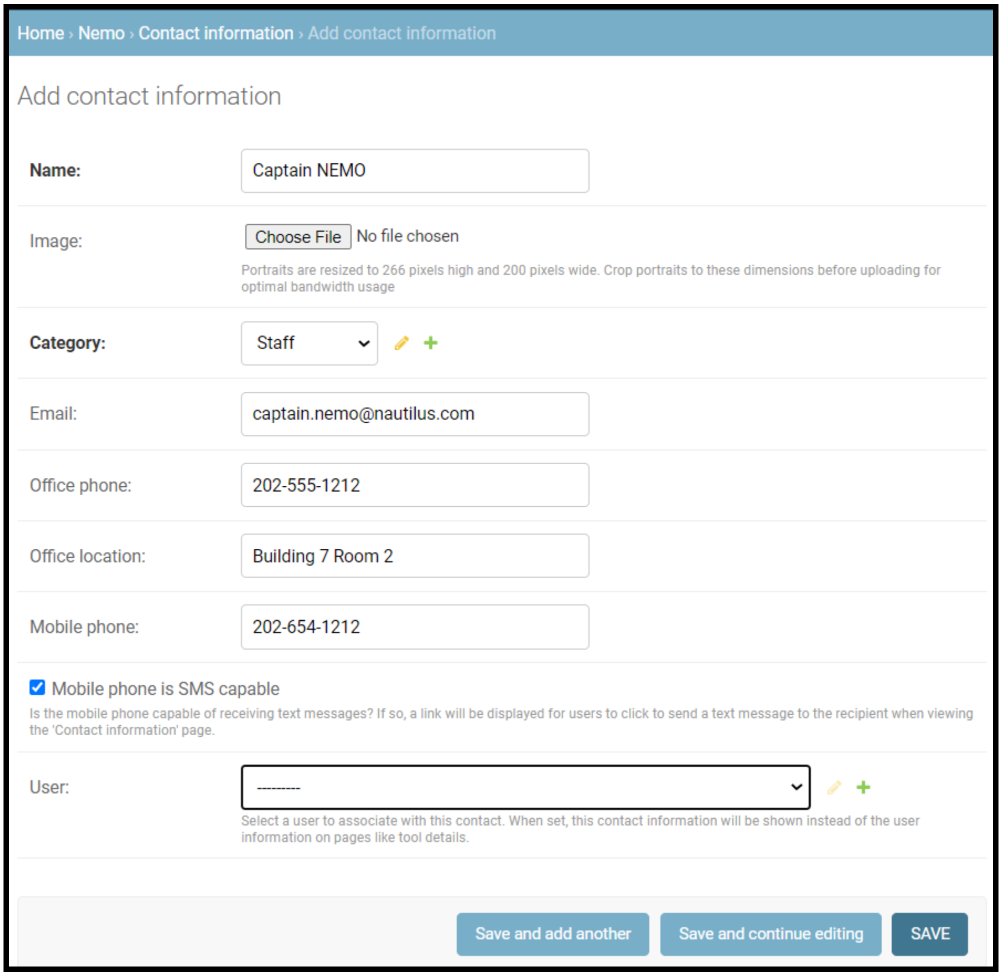


Figure 43.51: *Contact information add/edit page*

- Name – the name can be up to 200 characters and is not linked to a user in the user table (required).
- Image – an image of the contact can be uploaded to display on the

contact page.

- Category – The group the contact should be in. (required if categories are defined).
- Email – email address of the contact.
- Office phone – land line phone number of contact.
- Office location – text box for office location, can provide directions, etc.
- Mobile phone – mobile number of contact.
- SMS capable – If the mobile phone capable of receiving text messages a link will be displayed for users to click to send a text message to the recipient when viewing the 'Contact information' page.
- User – Select the NEMO user to associate with this contact. When a user and contact are associated, more contact information will be provided for the contact on the tool details page.

43.20.4 User access page

Contact information, if used, must be created in this table view and can be any text name. Contact information is discussed in the contact staff section 43.20.

43.21 Contact information categories

43.21.1 Usage

Contact information categories are optional but can be useful for grouping types of staff on the contact information page. Contact information categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no contact information categories are defined, all contacts will be listed in alphabetical order. Contact information categories are discussed in the contact staff section 43.20.

43.21.2 Summary Page

The summary page provides a listing of contact information categories (Figure 43.52). Click the name field in the row of interest to edit.

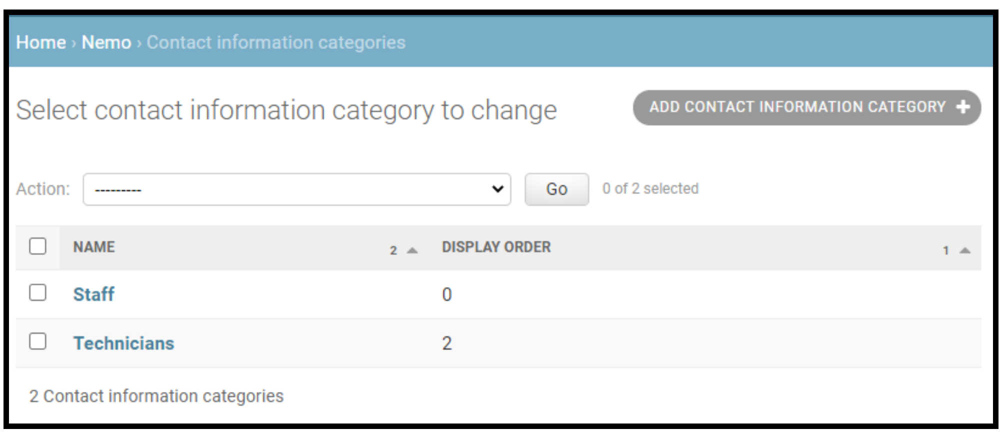


Figure 43.52: *Contact information categories summary page*

43.21.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.53).

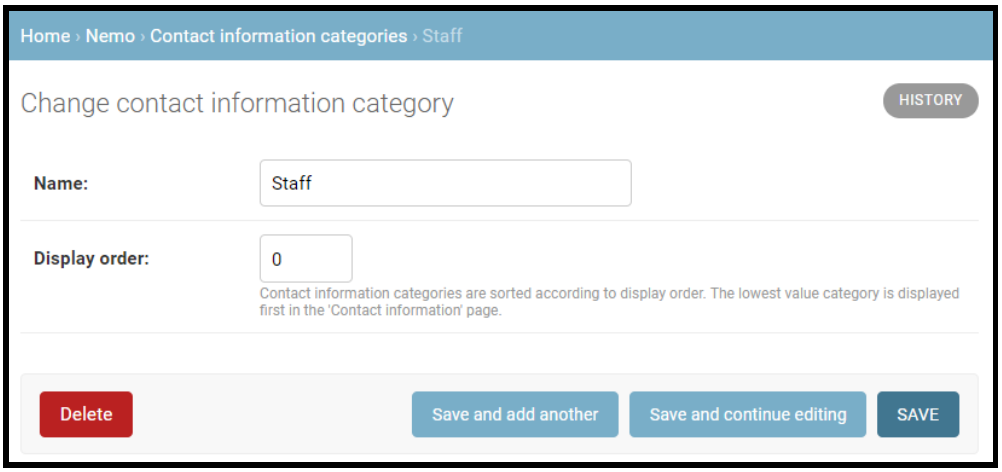


Figure 43.53: *Contact information categories add/edit page*

- Name – the name can be up to 200 characters (required).
- Display order – Contact information categories are sorted according to display order. The lowest value category is displayed first in the 'Contact information' page. (required).

43.21.4 User access page

Contact information categories, if used, must be created in this table view and can be any text name. Contact information categories are discussed in the contact staff section 43.20.

43.22 Doors

43.22.1 Usage

NEMO has the capability to control access to lab doors using a display with card reader and relay to actuate a door lock solenoid. Doors are optional but can be useful for ensuring lab occupancy is tracked. Doors are discussed in more detail in the entrance tablet chapter 53.

43.22.2 Summary Page

The summary page provides a listing of doors (Figure 43.54). Click the name field in the row of interest to edit. Once doors are defined, a URL is automatically available to access the door based on the row id number. In the doors summary page figure below, accessing <site_address>/welcome_screen/1/ will display the door access screen for the lab entrance door, while accessing <site_address>/farewell_screen/1/ will display the door exit screen.

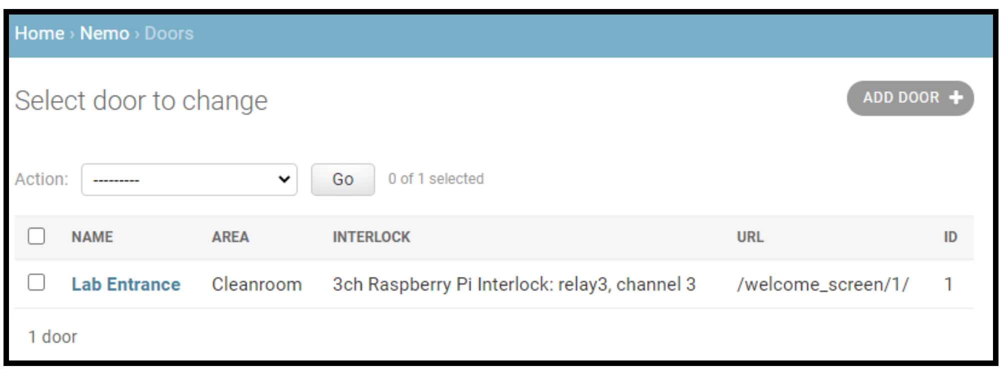


Figure 43.54: *Doors summary page*

43.22.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.55).

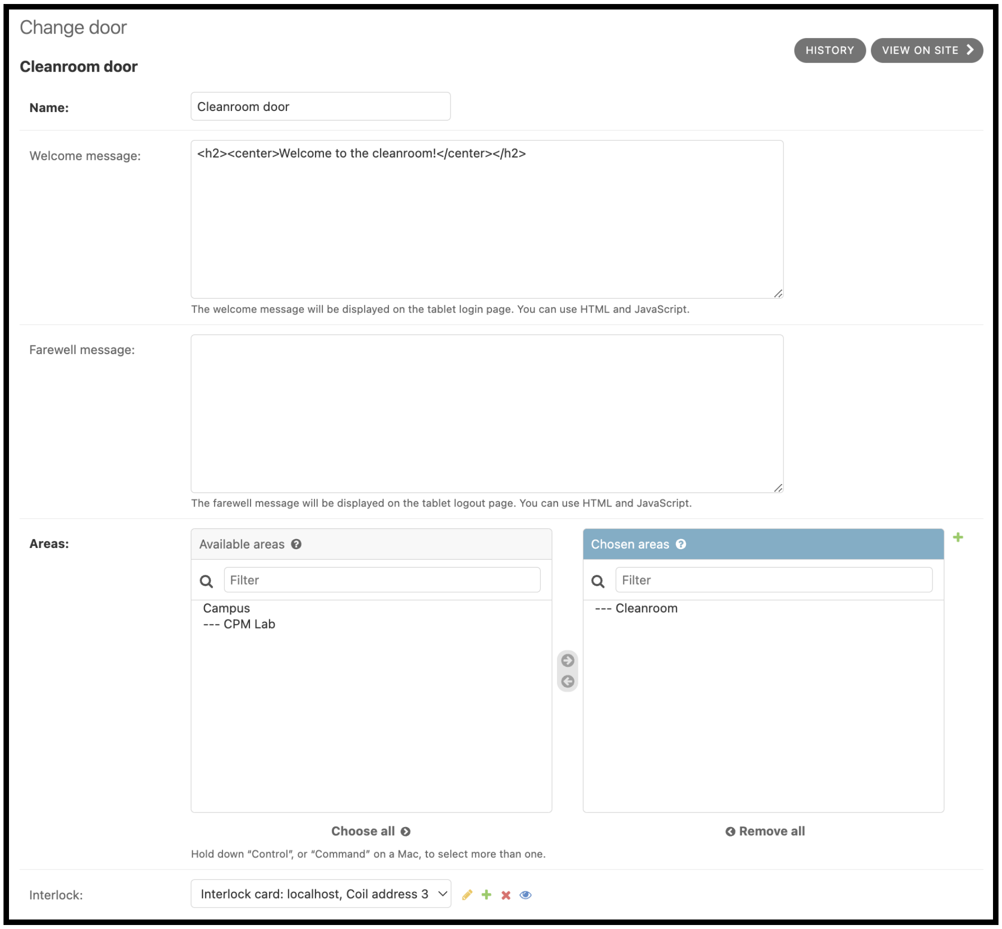


Figure 43.55: *Doors add/edit page*

- Name – the name can be up to 200 characters (required).
- Welcome message – the welcome message will be displayed on the tablet login page. You can use HTML and JavaScript. Only required for tablet door access control.

- Farewell message – the farewell message will be displayed on the tablet logout page. You can use HTML and JavaScript. Only required for tablet door access control.
- Areas – select the area(s) from the list. A user accessing this door will automatically be logged into this area if there is only one, and if there are more than one the user will be offered a choice. (required).
- Interlock – select the interlock from the dropdown list. This interlock relay will be actuated to unlock the door.

43.22.4 User access page

There is no user access page available for doors, outside of the area access pages who use the door id.

43.23 Email logs

43.23.1 Usage

All emails sent by NEMO are logged for audit purposes and accessible in the detailed administration. Use the send_email function available in utilities.py to automatically log emails.

43.23.2 Summary Page

The summary page provides a listing of emails sent by NEMO (Figure 43.56). Click the ID field in the row of interest to view. Email log records cannot be edited or deleted.

Figure 43.56: *Email logs summary page*

43.23.3 Fields

The add/change page for this table lists the email log fields. All the fields are read-only (Figure 43.57).

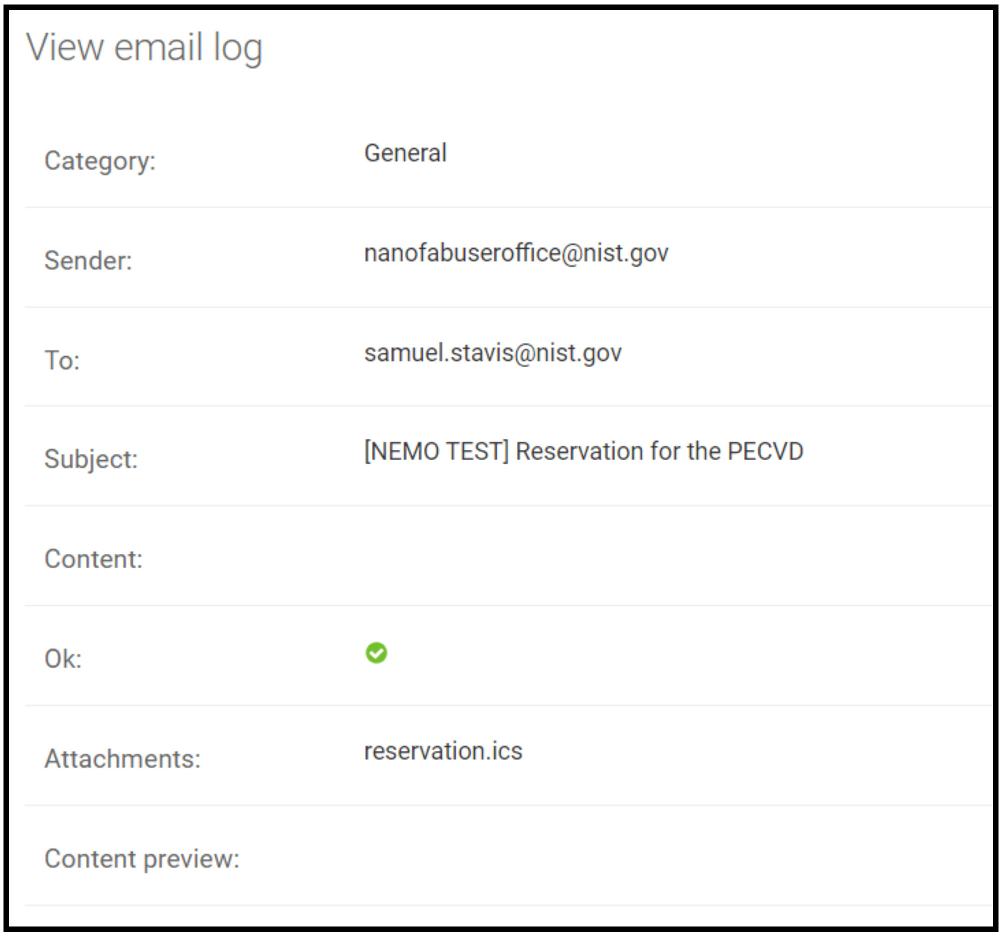


Figure 43.57: *Email logs view page*

- Category – the type of email NEMO sent.
- Sender – the name of the sender, typically the User office email defined in the customization page.

- To – the user the email was sent to.
- Subject – the subject of the email.
- Content – the body of the email.
- Ok – indicated if the message was sent without error.
- Attachments – list of files attached.
- Content preview – a preview of the email if available.

43.23.4 User access page

There is no user access page available for email logs. They are generated internally and cannot be modified or deleted.

43.24 Interlock card categories

43.24.1 Usage

Interlock card categories are used to link an interlock class in interlocks.py to interlock cards so NEMO knows how to talk to the interlock. An interlock card category should be created for each interlock class in interlocks.py that will be used to control tool access or door access.

43.24.2 Summary Page

The summary page provides a listing of interlock card categories (Figure 43.58). Click the name field in the row of interest to edit.

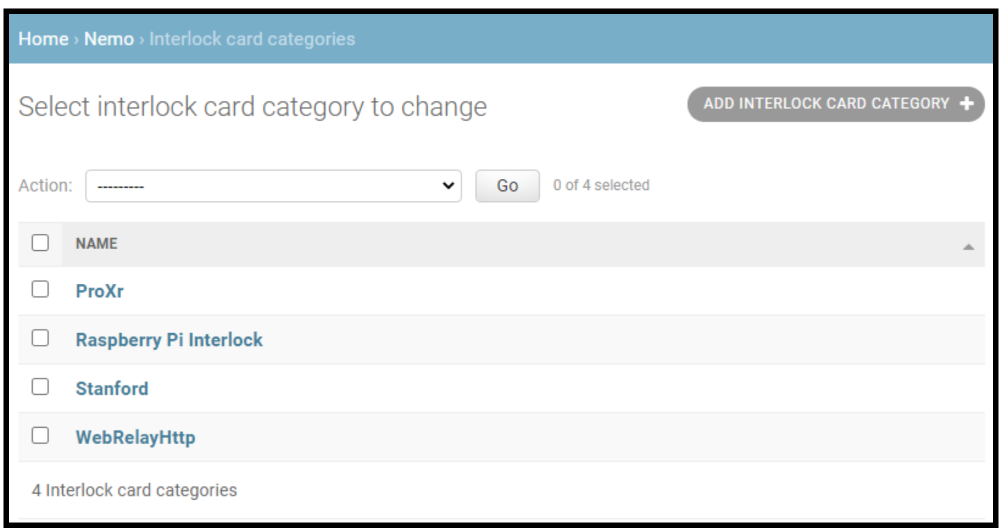


Figure 43.58: *Interlock card categories summary page*

43.24.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.59).

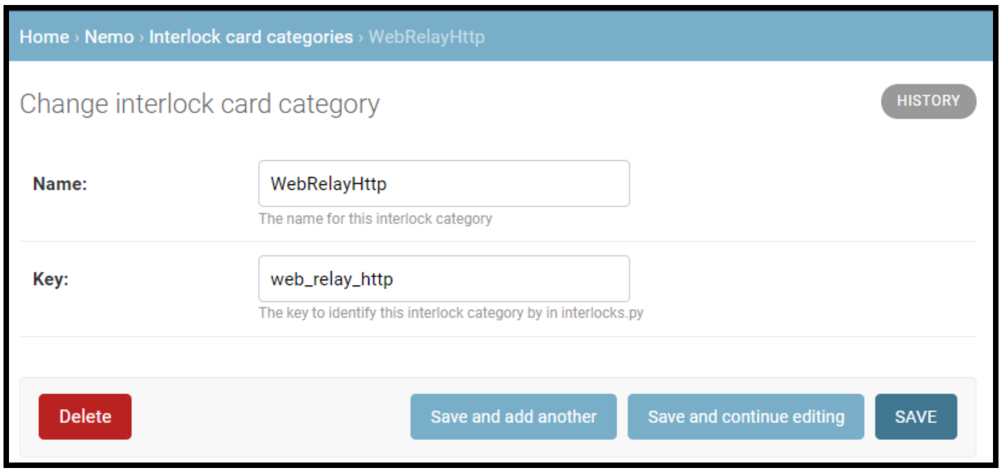


Figure 43.59: *Interlock card categories add/edit page*

- Name – name can be up to 200 characters (required).
- Key – The key to identify this interlock category in interlocks.py (required).

The interlocks.py file has a dictionary that links this key name to each interlock class in interlocks.py. Users can create their own interlock class and access it in NEMO by updating the dictionary to include their custom class (Figure 43.60).

```
interlocks: Dict[str, Interlock] = {
        'stanford': StanfordInterlock(),
        'web_relay_http': WebRelayHttpInterlock(),
        'proxr': ProXrInterlock(),
        'rpi_interlock': RPiInterlock(),
}
```

Figure 43.60: *Interlock card categories example dictionary in interlocks.py*

43.24.4 User access page

Interlock card categories, if used, must be created in this table view and can be any text name. Interlock card categories are used in the interlock cards table to define how NEMO should communicate with the interlock.

43.25 Interlock cards

43.25.1 Usage

Interlock cards define the communication parameters with an interlock device. Regardless if single relay interlock devices are used or multi-relay interlock devices are used, each device will require definition as an interlock card. Information such as IP address, port number and interlock category define how NEMO will communicate with the device.

43.25.2 Summary Page

The summary page provides a listing of interlock cards (Figure 43.61). Click the name field in the row of interest to edit.

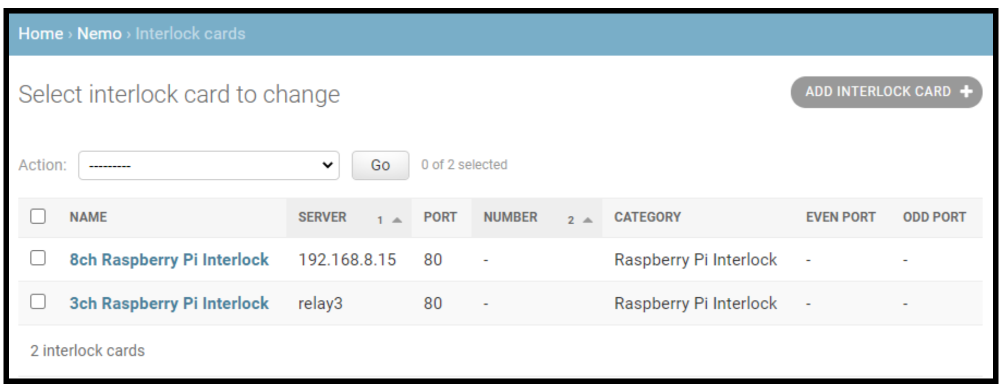


Figure 43.61: *Interlock cards summary page*

43.25.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.62).

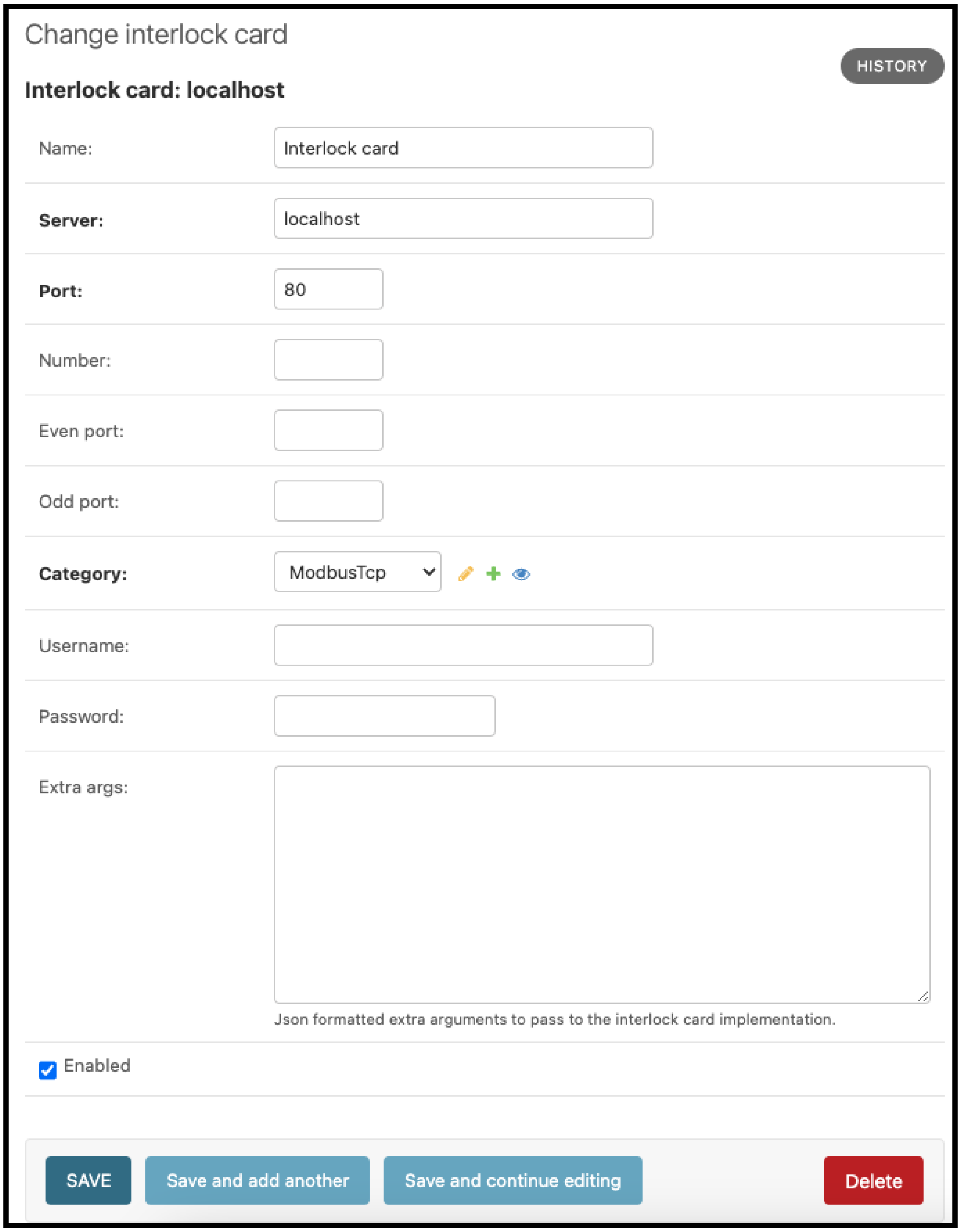


Figure 43.62: *Interlock cards add/edit page*

- Name – name can be up to 200 characters (required).

- Server – IP address or FQDN of interlock device (required).
- Port – port number to access device through (required).
- Number – Card number (required for Stanford interlocks).
- Even port – even port number (required for Stanford interlocks).
- Odd port – odd port number (required for Stanford interlocks).
- Category – interlock card category selectable from drop down list (required). See Interlock card categories.
- Username – if a username and password is required to access the interlock device, enter the username.
- Password – if a username and password is required to access the interlock device, enter the password.
- Extra args - JSON field that can be used by interlock card implementations for different purposes. For interlock card categories included in NEMO the attribute “timeout” can be used to specify the connection timeout.
- Enabled – check box to set the status of the device, normally checked.

43.25.4 User access page

Interlock cards, if used, must be created in this table view and can be any text name. Interlock cards are used in the interlocks table to define which interlock device to talk to.

43.26 Interlocks

43.26.1 Usage

The interlocks table defines each relay on an interlock card. An entry is required for each relay on the card that will be used. NEMO areas and tools access the interlocks to control lab door and tool access.

43.26.2 Summary Page

The summary page provides a listing of interlocks (Figure 43.63). Click the id field in the row of interest to edit.

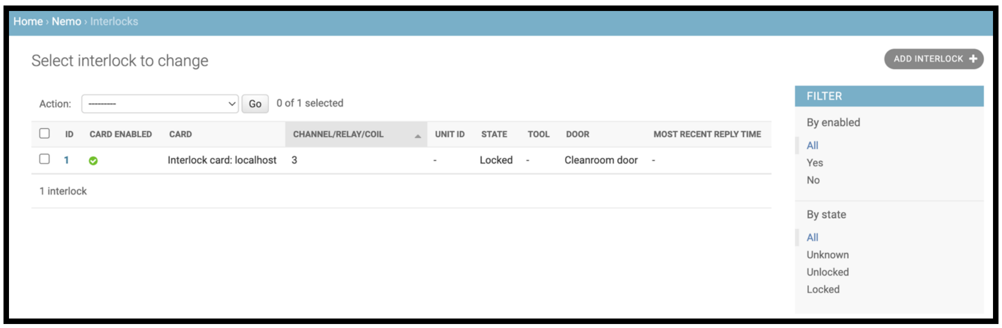


Figure 43.63: *Interlocks summary page*

43.26.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.64).

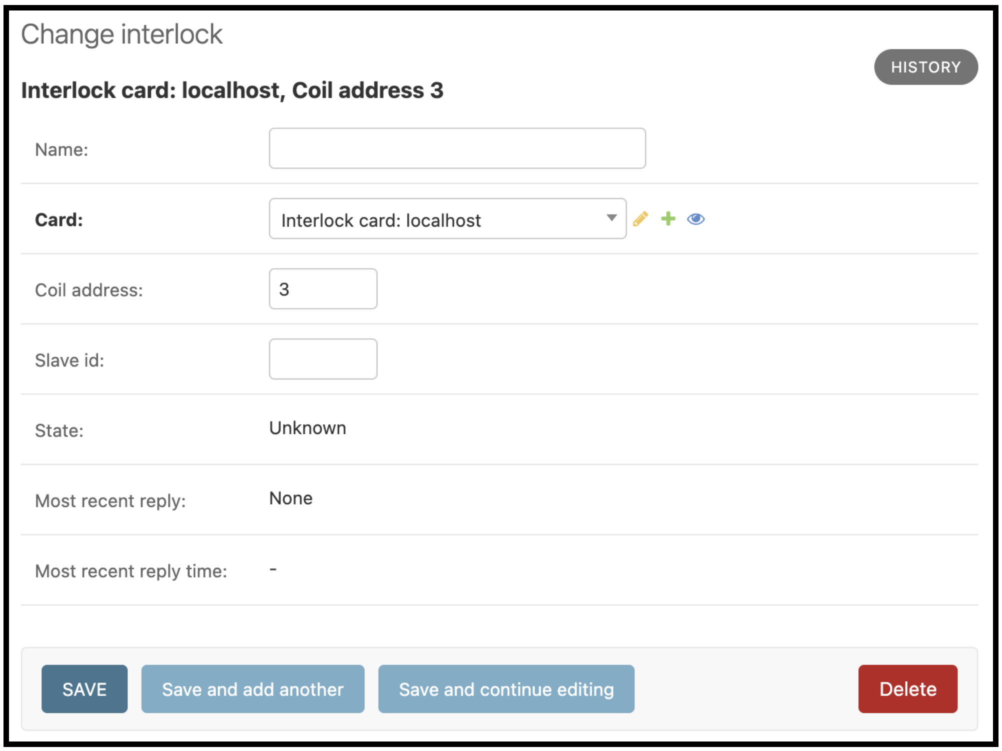


Figure 43.64: *Interlocks add/edit page*

- Name – enter an optional name for this interlock (required).
- Card – select the card from the drop-down list (required).
- Channel/Relay/Coil – the channel, relay or coil number of the interlock (required).
- Multiplier/Unit id/Bank – the multiplier, unit id or bank number for the interlock.

- State – Informational only, can be locked, unlocked, or unknown if not initialized.
- Most recent reply – Informational only, useful for testing.
- Most recent reply time – Time the latest reply was received.

43.26.4 User access page

Interlocks, if used, must be created in this table view. Interlocks are used in the tools and doors table to define which relay is used on an interlock card.

43.27 Landing page choices

43.27.1 Usage

The landing page choices table stores configurable quick links that are displayed at the bottom of the landing page. The links can be tailored for desktop or laptop rendering and provide shortcuts to NEMO pages that are or are not accessible from the navigation bar, organizational pages, or outside resources. The landing page is fully described in the landing page section 43.27.

43.27.2 Summary Page

The summary page provides a listing of landing page choices (Figure 43.65). Click the name field in the row of interest to edit.

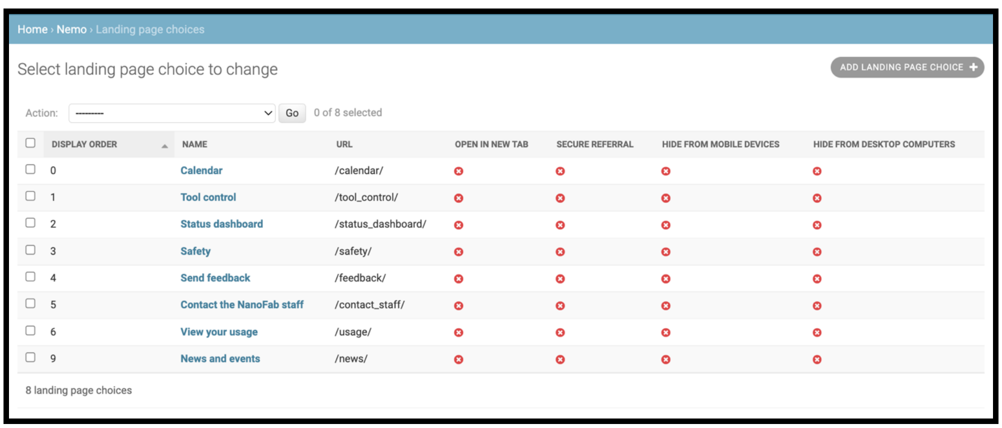


Figure 43.65: *Landing page choices summary page*

43.27.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.66).

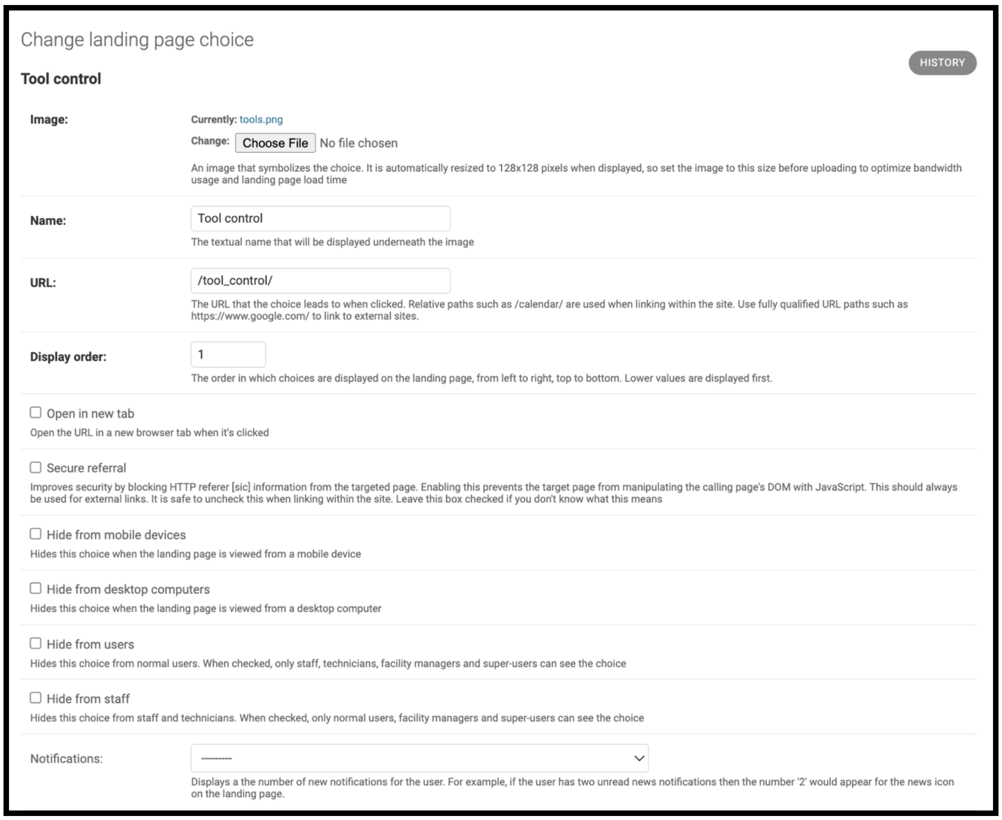


Figure 43.66: *Landing page choices add/edit page*

- Image – click the choose file button to select the icon image of interest. It is automatically resized to 128 x 128 pixels when displayed, so set the image to this size before uploading to optimize bandwidth usage and landing page load time. (required).
- Name – the textural name that will be displayed below the image. (required).

- URL – The URL that the choice leads to when clicked. Relative paths such as /calendar/ are used when linking within the site. Use fully qualified URL paths such as https://www.google.com/ to link to external sites. (required).
- Display order – The order in which choices are displayed on the landing page, from left to right, top to bottom. Lower values are displayed first. (required).
- Open in new tab – check the checkbox to open the URL in a new browser tab when it's clicked.
- Secure referral – Improves security by blocking HTTP referrer [sic] information from the targeted page. Enabling this prevents the target page from manipulating the calling page's DOM with JavaScript. This should always be used for external links. It is safe to uncheck this when linking within the site. Leave this box checked if you don't know what this means.
- Hide from mobile devices – Hides this choice when the landing page is viewed from a mobile device.
- Hide from desktop computers – Hides this choice when the landing page is viewed from a desktop computer.
- Hide from users – Hides this choice from normal users. When checked, only staff, technicians, and admins can see the choice.
- Hide from staff – Hides this choice from staff and technicians. When checked, only normal users, facility managers and admins can see the choice.
- Notifications – Displays the number of new notifications for the user. For example, if the user has two unread news notifications then the number '2' would appear for the news icon on the landing page. Notifications table.

43.27.4 User access page

Landing page choices, if used, must be created in this table view. Once created, they appear on the landing page displaying the uploaded icon and description. The landing page is fully described in the landing page section 43.27.

43.28 Membership histories

43.28.1 Usage

The membership histories table automatically tracks several user actions, who took them, and when.

Actions tracked:

- Project joined or removed from an account.
- User joined or removed from a project.
- User joined or removed from a tool qualification.
- User joined or removed from a physical access level.

Normally, this table does not require direct editing. User permissions and permission history can be accessed on the users page. Account and project changes are in the account and project page.

43.28.2 Summary Page

The summary page provides a listing of membership histories (Figure 43.67). Click the membership history field in the row of interest to edit.

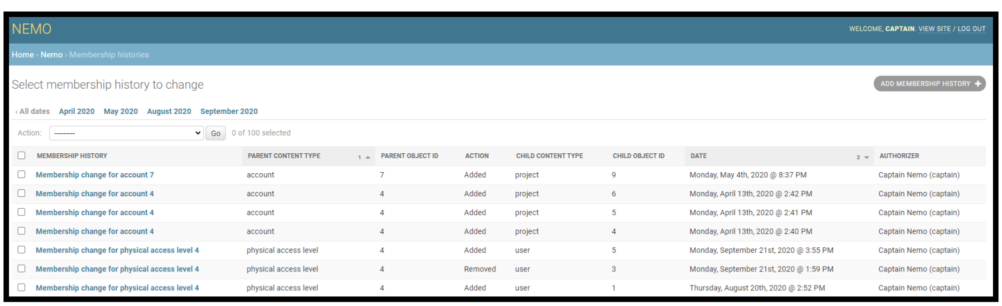


Figure 43.67: *Membership histories summary page*

43.28.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.68).

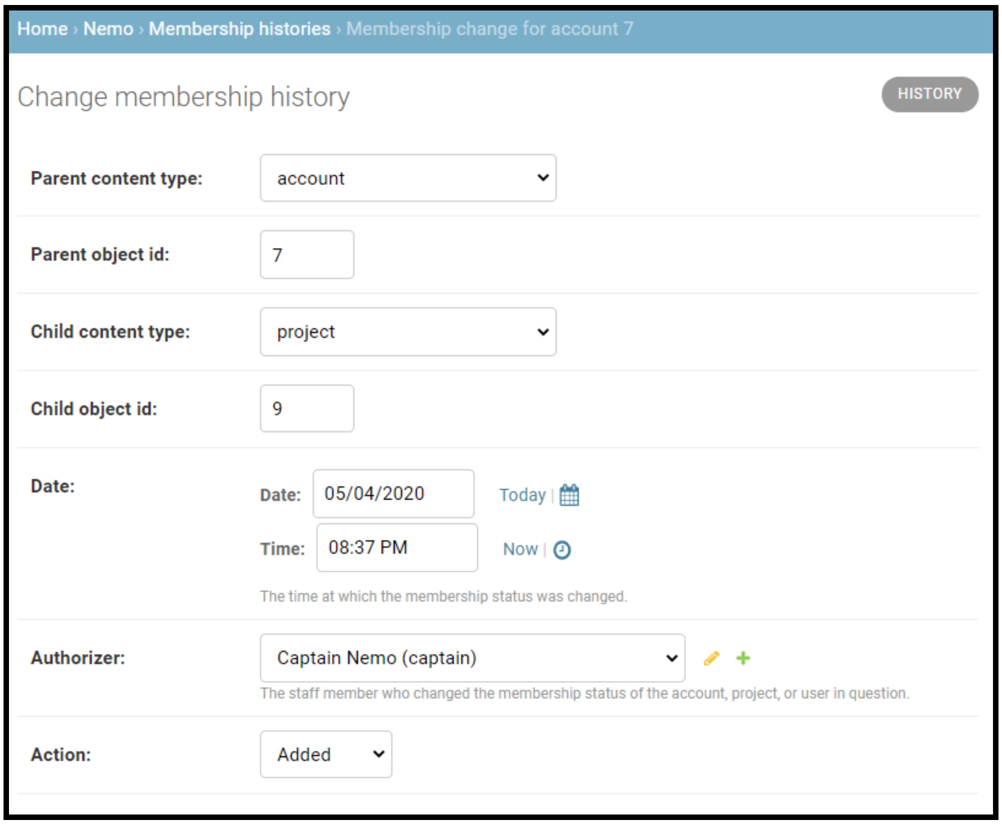


Figure 43.68: *Membership histories add/edit page*

- Parent content type – select from drop down list either account, physical access level, project or tool. Selection corresponds to a record in Accounts table, Physical access levels table, Projects table, or Tools table.
- Parent object id – the table row id number of the content type. For example, it the content type is account, an id of 10 would correspond to the account table where id=10.

- Child object type – select from the drop-down list either user or project. Selection corresponds to a record in Users table or Projects table.
- Child object id – the table row id number of the object type.
- Date – date and time action was taken.
- Authorizer – the user that made the change (required) Users table.
- Action – select from drop down list either added or removed.

43.28.4 User access page

Normally, this table does not require direct editing. User permissions and permission history can be accessed on the users page, see chapter 39. Account and project changes are detailed in the account and project chapter 22.

43.29 News

43.29.1 Usage

The news table stores the story information for the news and events page. This table normally does not require direct editing however story content mistakes can be corrected here. The news and events page is detailed in the news and events page, see chapter 17.

Normally, this table does not require direct editing. User permissions and permission history can be accessed on the users page, see chapter 39. Account and project changes are detailed in the account and project chapter 22.

43.29.2 Summary Page

The summary page provides a listing of news stories (Figure 43.69). Click the id field in the row of interest to edit.

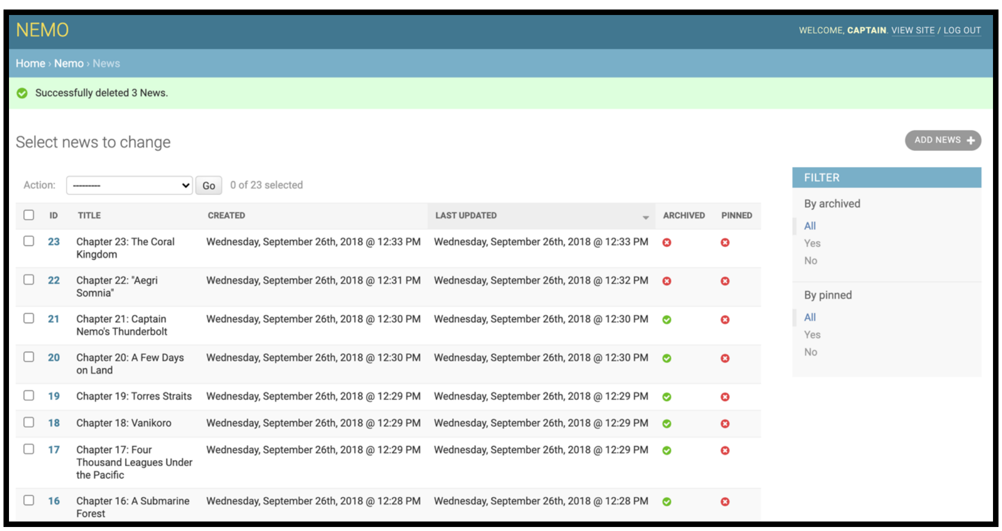


Figure 43.69: *News summary page*

43.29.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.70).

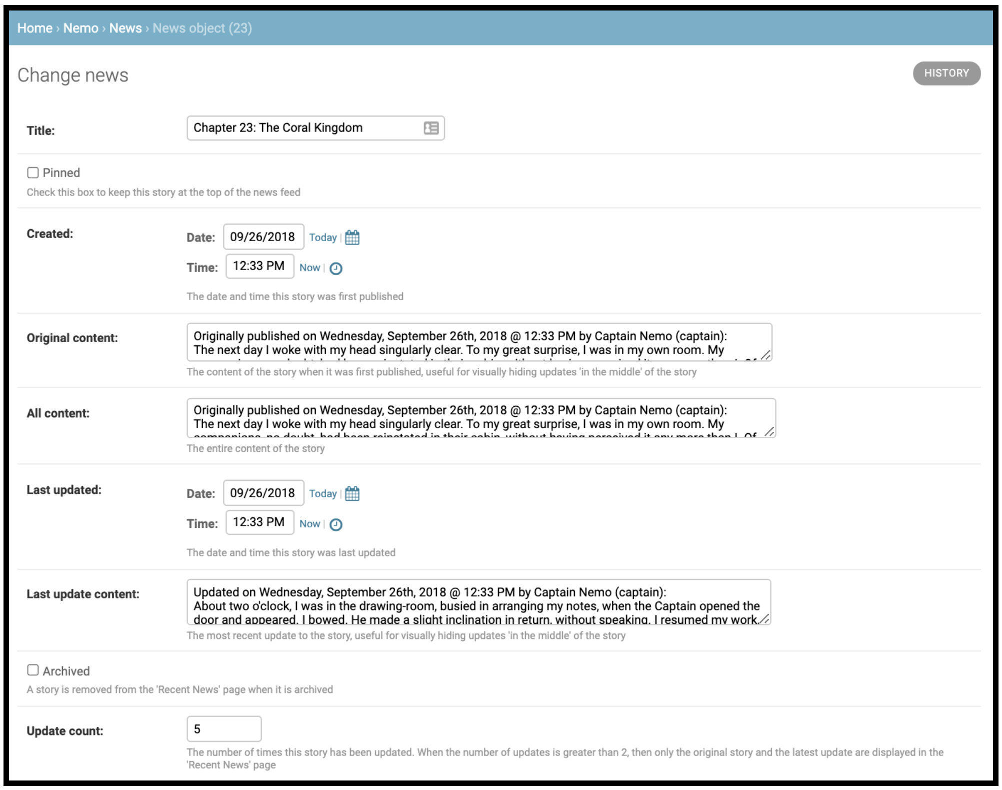


Figure 43.70: *News add/edit page*

- Title – this is the top-level title given to the news story.
- Pinned – checkbox to indicate whether or not this news story should stay at the top.
- Created – date and time story was initially posted.
- Original content - the content of the story when it was first published, useful for visually hiding updates 'in the middle' of the story.

- All content – the entire content of the story including all updates.
- Last updated – date and time the story was last updated.
- Last update content – the most recent update to the story useful for visually hiding updates 'in the middle' of the story.
- Archived – checkbox to indicate that the story has been removed from the Recent News page.
- Update count – integer number to indicate the number of times the story has been updated. When the number of updates is great than 2, only the original story and the latest update are displayed in the recent news page to save space. A reader would need to expand the story to see all of the content.

43.29.4 User access page

Normally, this table does not require direct editing. Adding and updating news stories is done on the news and events page, see chapter 17.

43.30 Notifications

43.30.1 Usage

The notifications table stores updates to news and safety events so notification alerts can be provided on a user-by-user basis on the landing page icons if used. If a new safety event or new news event is updated or published, the notifications will be triggered and stored in this table. Once a user visits the safety or news page, the notification is deleted from the table. Notifications are displayed as a number at the bottom right of the safety or new icon on the landing page. Safety notifications are discussed in the safety section 11.6. News notifications are discussed in the news and events chapter 17.

43.30.2 Summary Page

The summary page provides a listing of notifications (Figure 43.71). Click the id field in the row of interest to edit.

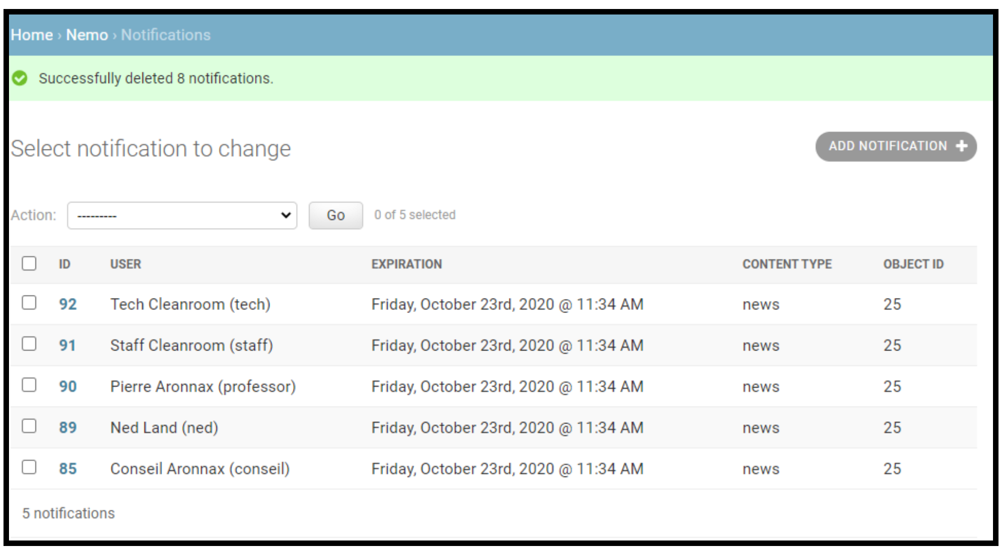


Figure 43.71: *Notifications summary page*

43.30.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.72).

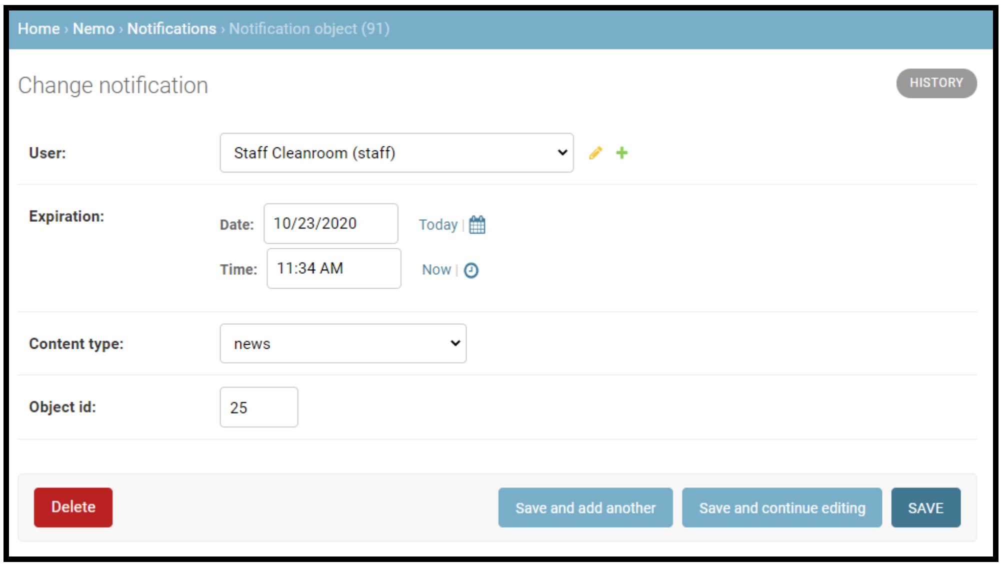


Figure 43.72: *Notifications add/edit page*

- User – the person the notification is for. (required).
- Expiration – date and time notification will expire. Currently all notifications post for 30 days. (required).
- Content type – select from drop down list. Only news and safety issue have been implemented. (required).
- Object id – the ID of the news or safety issue record in their respective tables. (required).

43.30.4 User access page

Normally, this table does not require direct editing. Safety notifications are discussed in the safety section 11.6. News notifications are discussed in the news and events chapter 17.

43.31 Onboarding phases

43.31.1 Usage

Onboarding phases are optional and provide a way to keep track of user onboarding for staff users. They are meant to be used as a checklist.

43.31.2 Summary Page

The summary page provides a listing of onboarding phases (Figure 43.73). Click the name field in the row of interest to edit.

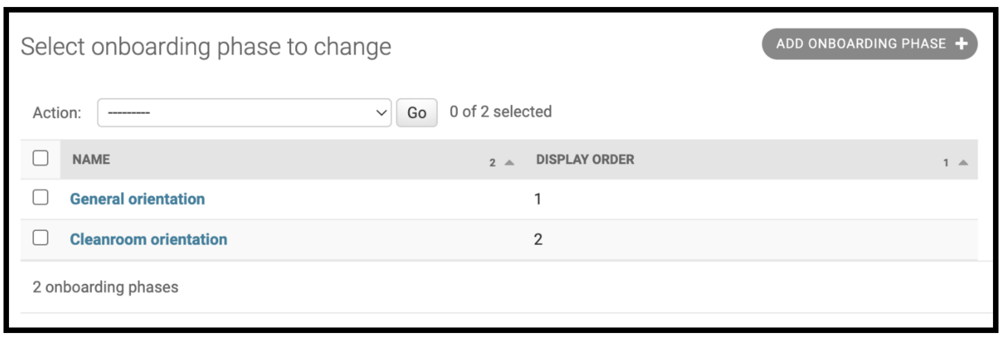


Figure 43.73: *Onboarding phases summary page*

43.31.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.74).

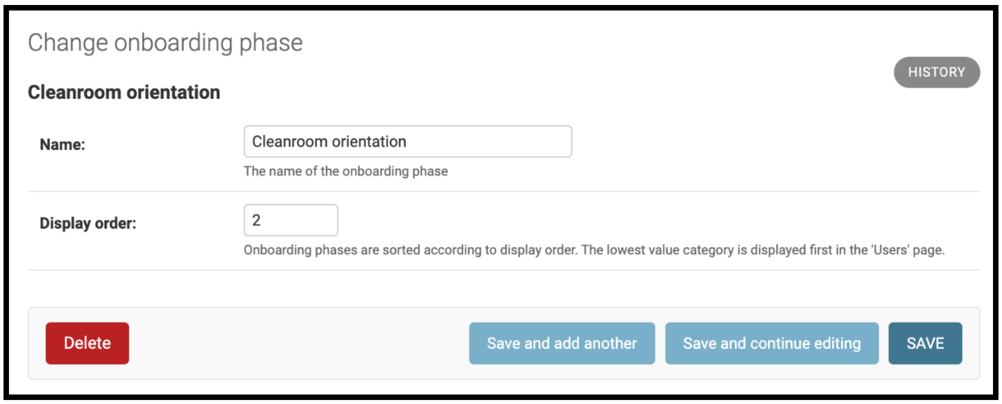


Figure 43.74: *Onboarding phases add/edit page*

- Name – the name of the onboarding phase. (required).
- Display order – the order to display this onboarding phase in. (required).

43.31.4 User access page

There is no user access page available for onboarding phases. However, they are displayed as a checklist when creating/editing Users, see chapter 39.

43.32 Physical access levels

43.32.1 Usage

The physical access levels table associates areas with schedules. Schedules can be set for always, weekends, or weekdays between a set start and end time. User permissions to access areas are given as physical access levels to have the ability to limit the days and times users have access. Exceptions to a physical access level can be made using the physical access exception table detailed above. Exceptions could be a holiday schedule or other expected closures. User permissions are discussed on the users page, see chapter 39.

43.32.2 Summary Page

The summary page provides a listing of physical access levels (Figure 43.75). Click the name field in the row of interest to edit.

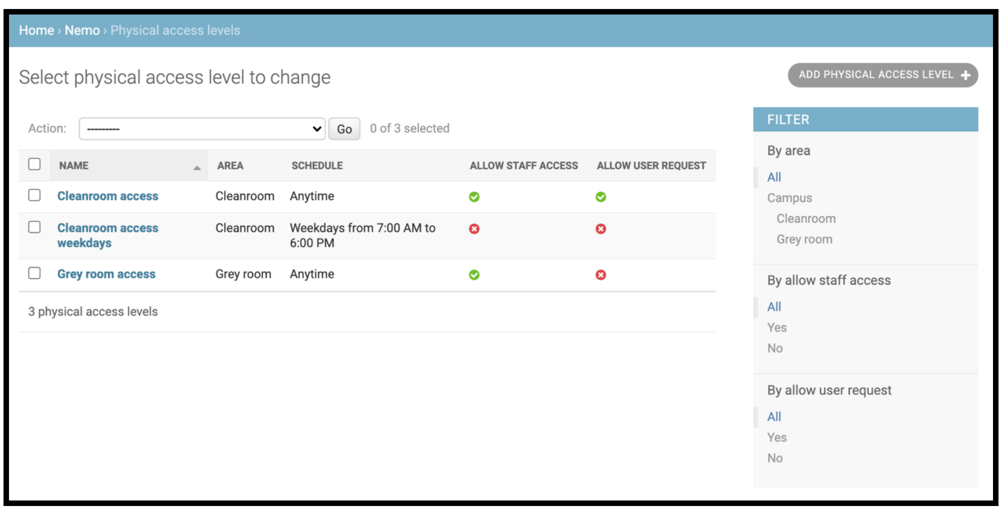


Figure 43.75: *Physical access levels summary page*

43.32.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.76, Figure 43.77).

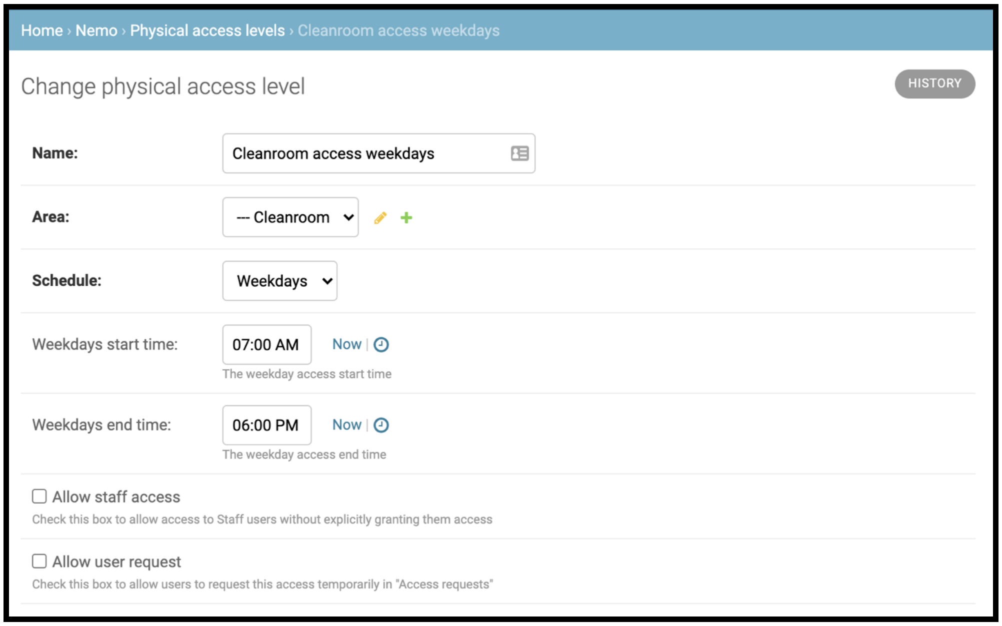


Figure 43.76: *Physical access levels add/edit page 1*

- Name – descriptive name of physical access level (required).
- Area – select from drop down list the area this access level is associated with. (required) Areas table.
- Schedule – select from drop down list. Available options are Always, Weekdays, or Weekends. (required).
- Weekdays start time – the time weekday access will start. (required if weekdays schedule is selected).
- Weekdays end time – the time weekday access will end. (required if weekdays schedule is selected).

- Allow staff access – checking this box will give staff users access even if not explicitly granted in the user dialog.
- Allow user request – checking this box will allow users to request this access in Access requests, see section 8.2.

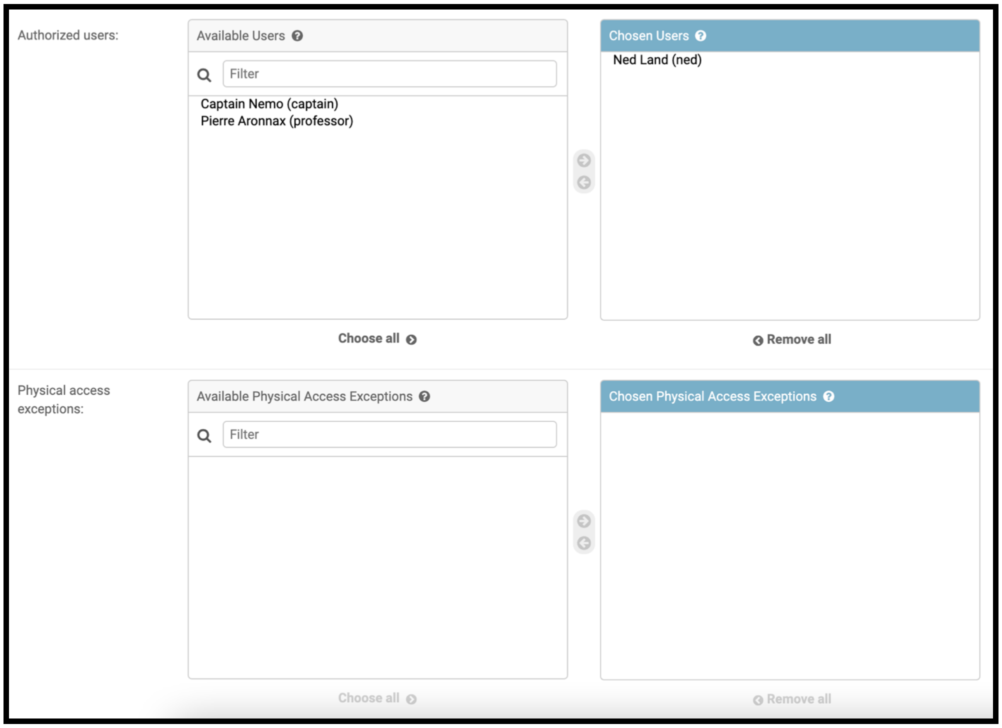


Figure 43.77: *Physical access levels add/edit page 2*

- Authorized users – select available users and use the right arrow to add to the chosen users list. Multiple users can be selected using the control or shift keys.
- Physical access exceptions – select available exceptions and use the right arrow to add to the chosen list. Multiple exceptions can be selected using the control or shift keys. More details about exceptions can be found in Detailed administration - Physical access exceptions, see section 43.32.

43.32.4 User access page

There is no user page available to create physical access levels. Once created, permissions to access physical levels are given to users on the users page, see chapter 39.

43.33 Physical access logs

43.33.1 Usage

The physical access logs automatically record each time a door is accessed by a user at an entrance tablet and the access result. Doors are discussed in more detail in the entrance tablet chapter 53.

43.33.2 Summary Page

The summary page provides a listing of physical access logs (Figure 43.78). Click the user field in the row of interest to edit.

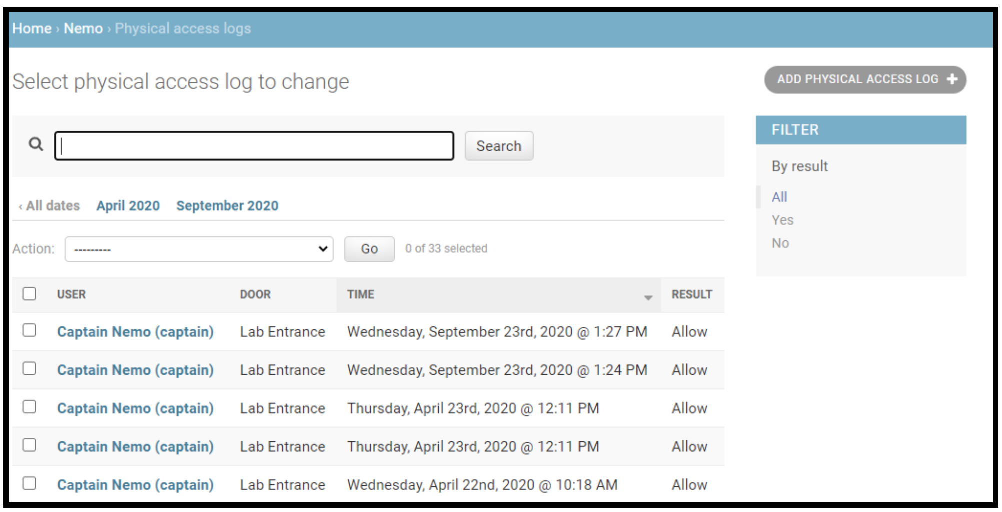


Figure 43.78: *Physical access logs summary page*

43.33.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.79).

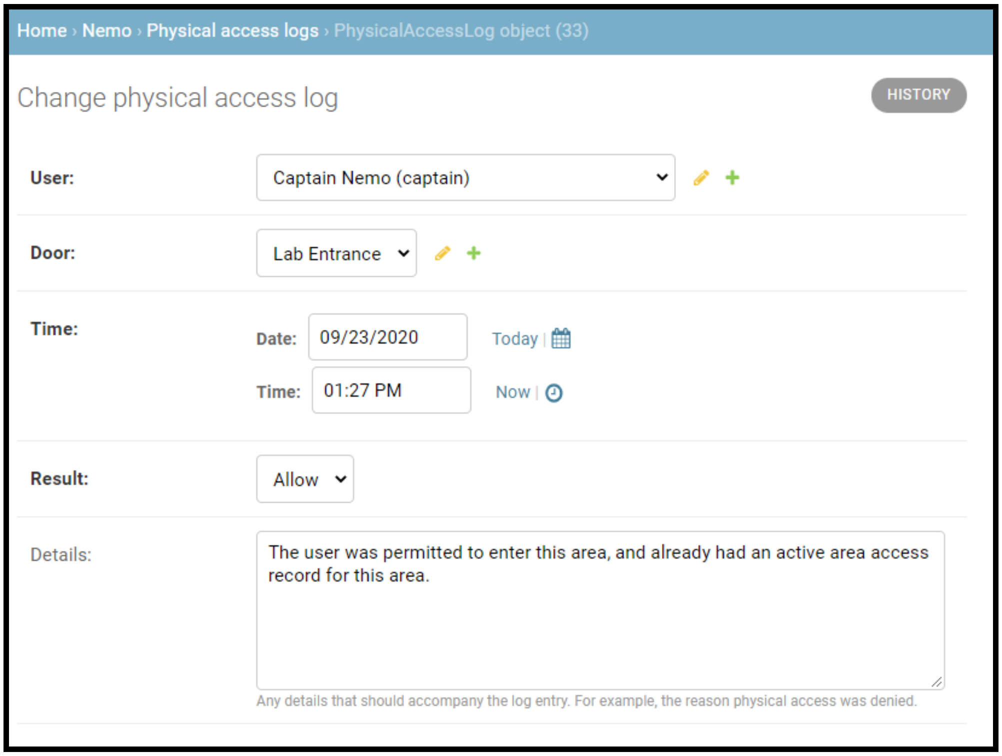


Figure 43.79: *Physical access logs add/edit page*

- User – drop down list of name of user accessing door. (required) Users table.
- Door – drop down list of doors. (required) Doors table.
- Time – date/time door was accessed. (required).
- Result – drop down list allow or deny. (required).
- Details – narrative of access event.

43.33.4 User access page

There is no user page available to create or edit physical access logs. Events are created automatically when a door is accessed at an entrance tablet. Doors are discussed in more detail in the entrance tablet chapter 53.

43.34 Project types

43.34.1 Usage

The project types table lists the types of project that can be set in NEMO.

43.34.2 Summary Page

The summary page provides a listing of project types (Figure 43.80). Click the name field in the row of interest to edit.

Figure 43.80: *Project types summary page*

43.35 Project disciplines

43.35.1 Usage

Project disciplines are optional but are useful to group projects based on their main discipline, for example Chemistry, Physics etc. Disciplines won't appear as an option for projects unless at least one discipline has been added.

43.35.2 Summary Page

The summary page provides a listing of disciplines (Figure 43.81). Click the name field in the row of interest to edit.

Figure 43.81: *Disciplines summary page*

43.35.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.82).

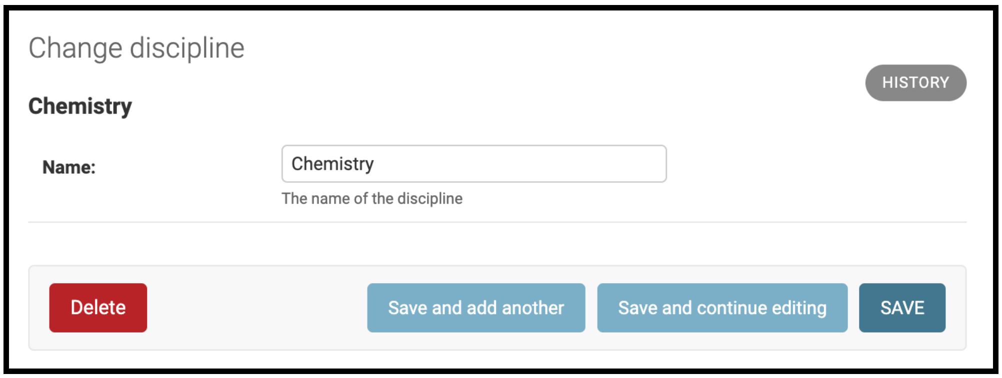


Figure 43.82: *Disciplines add/edit page*

43.35.4 User access page

There is no user access page available for disciplines. However, they are displayed as an optional field when creating/editing Projects, see chapter 40.

43.35.5 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.83).

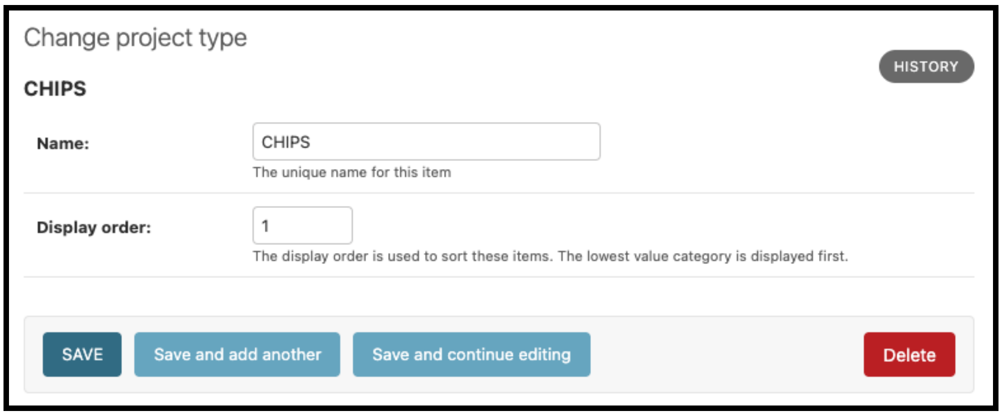


Figure 43.83: *Project types add/edit page*

- Name – descriptive name of the project type (required).
- Display order – the order in which to display the type. The lowest value is displayed first (required).

43.35.6 User access page

Project types are set when creating new projects in chapter 22.

43.36 Projects

43.36.1 Usage

The projects table maintains the association of projects with a parent account and child users. For a user to access NEMO resources the user must be active on a project which is active on an account. A detailed discussion of projects can be found in the Accounts and projects chapter 22.

43.36.2 Summary Page

The summary page provides a listing of projects (Figure 43.84). Click the name field in the row of interest to edit.

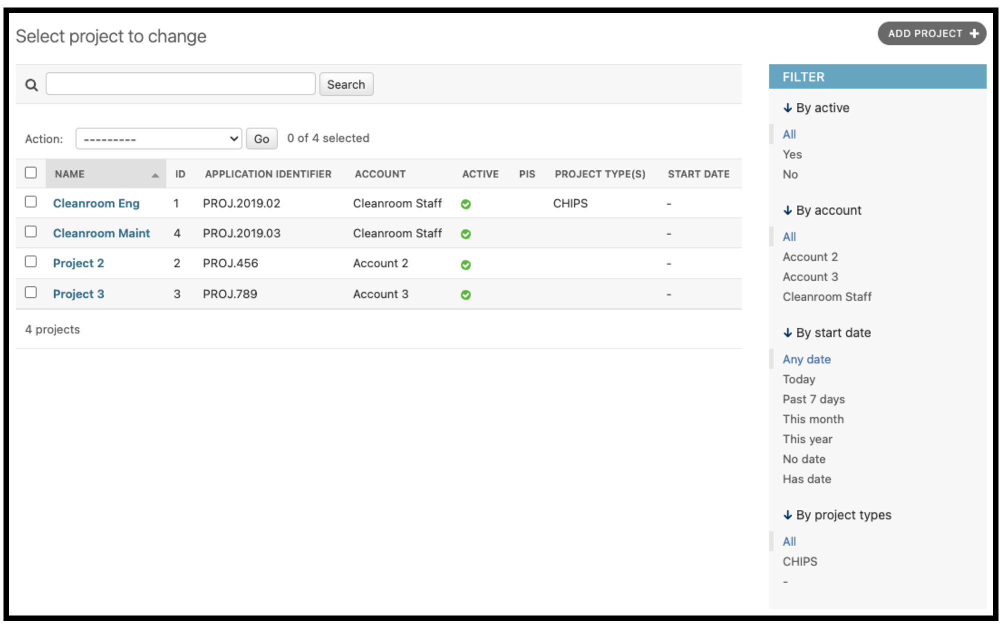


Figure 43.84: *Projects summary page*

43.36.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.85 and Figure 43.86).

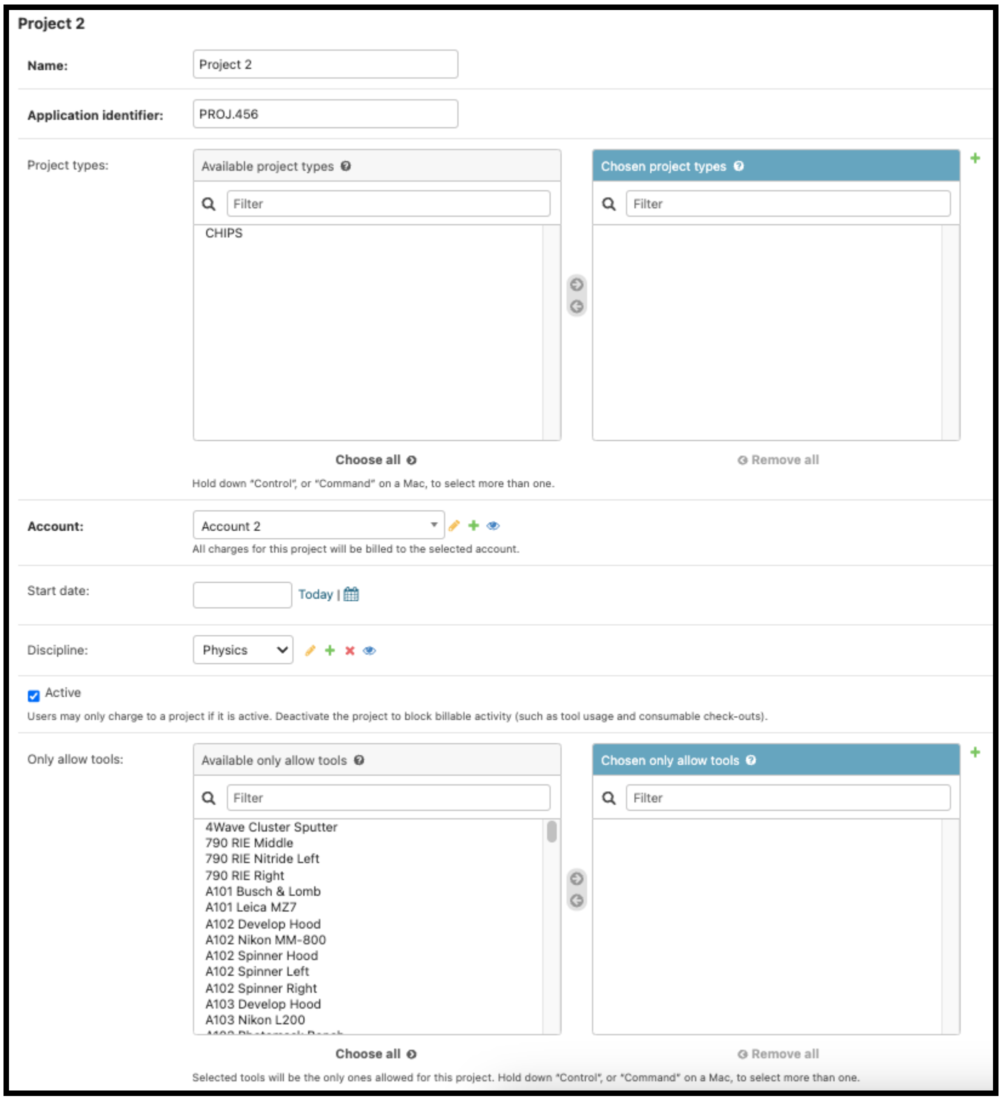


Figure 43.85: *Projects add/edit page*

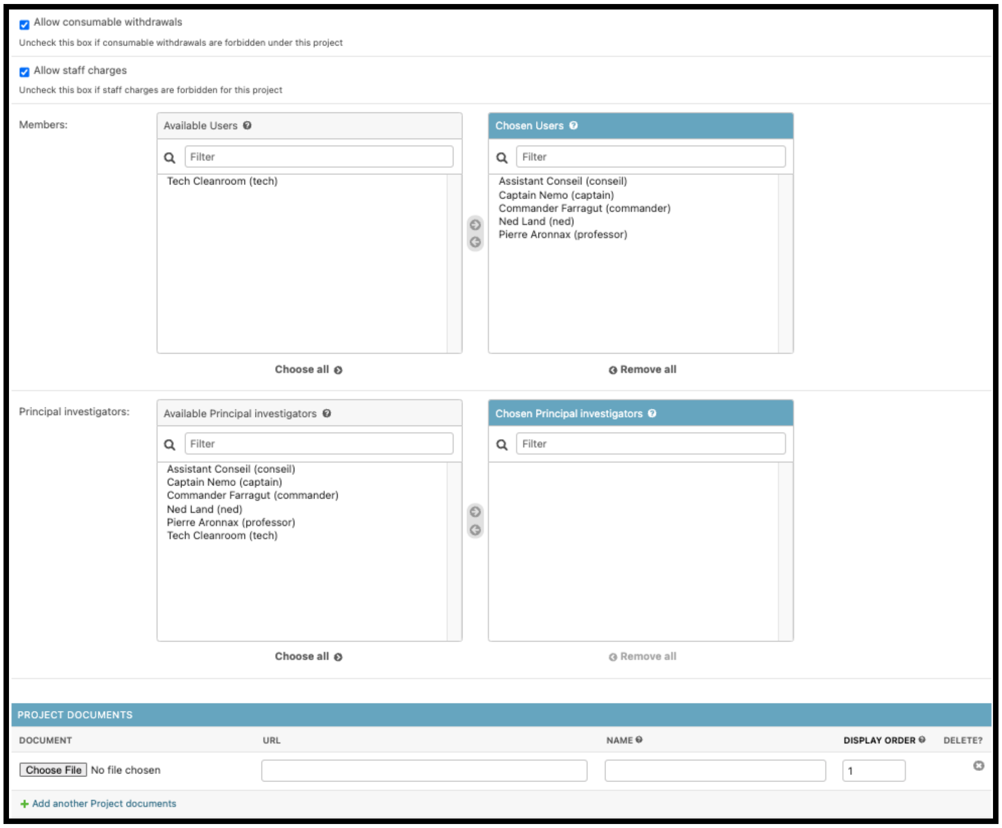


Figure 43.86: *Projects add/edit page (continued)*

- Name – descriptive name of project (required).
- Application identifier – the application identifier is not used by NEMO but is a convenient way to associate the project with external project tracking systems. (required).
- Project types – select available project types and use the right arrow to add to the chosen project type list. Multiple types can be selected using the control or shift keys.
- Account – select from drop down list. All charges for this project will be billed to the selected account. (required).

- Start date – the start date for this project.
- Discipline – the discipline for this project.
- Active – users may only charge to a project if it is active. Deactivate the project to block billable activity (such as tool usage and consumable check-outs).
- Only allow tools – select available tools to limit billing options for this project. Users belonging to this project will only be able to reserve and enable those specific tools, and areas that this tool requires access to. Staff charges will only be available for those tools and areas they require. Training will also be limited to the tools as well.
- Allow consumable withdrawals – unselect to prevent consumable/supplies withdrawals for this project. Default is enabled.
- Allow staff charges – unselect to prevent staff charges for this project. Default is enabled.
- Members – select available users and use the right arrow to add to the chosen users list. Multiple users can be selected using the control or shift keys.
- Principal Investigators – select available users and use the right arrow to add to the chosen users list. Multiple users can be selected using the control or shift keys.
- Project documents – the list of documents for this project. Documents can be links or files to be uploaded in NEMO. Optionally, a name can also be entered. If a name is not provided, it will default to the file name.

43.36.4 User access page

Projects are administered in the Accounts and projects chapter 22.

43.37 Recurring charges

43.37.1 Usage

Recurring charges are used to charge customers for consumables at regular intervals. For example, a yearly or monthly fee for renting storage bins or cleanroom gowns.

43.37.2 Summary Page

The summary page provides a listing of recurring charges (Figure 43.87). Click the name field in the row of interest to edit.

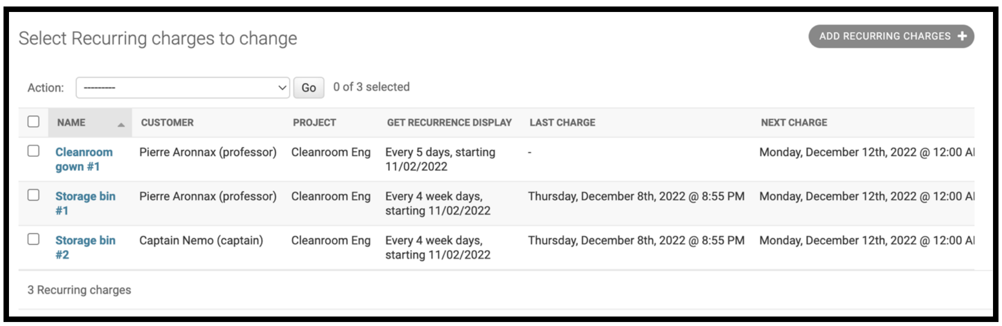


Figure 43.87: *Recurring charges summary page*

43.37.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.88).

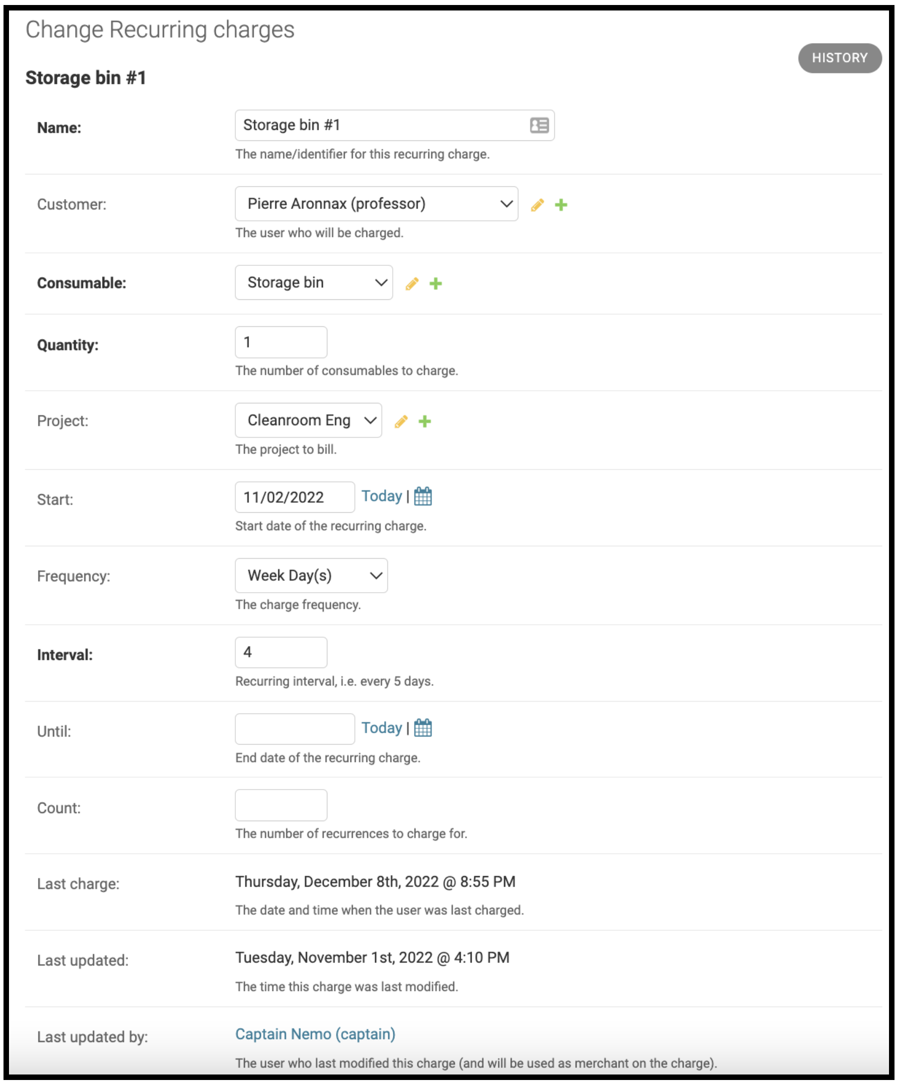


Figure 43.88: *Recurring charges add/edit page*

- Name – descriptive name of the recurring charge (required).

- Customer – select from drop down list. The user to charge.
- Consumable – select from drop down list. The consumable to charge (required).
- Quantity – the quantity of consumable to start (required).
- Project – select from drop down list. The project to charge.
- Start – the date to start charging. This is used as the starting point for the frequency.
- Frequency – select from drop down list. The frequency at which to charge.
- Interval – the interval of the frequency. For example, every 2 days.
- Until – the date to stop charging. If left blank the consumable will be charged at the frequency indefinitely.
- Count – the number of times to charge before stopping. For example, charge every 2 days 5 times. If left blank the consumable will be charged at the frequency indefinitely.
- Last charge – read-only field showing the last time this item was charged.
- Last updated – read-only field showing when this item was updated last.
- Last updated by – read-only field showing the user who last updated this item.

43.37.4 User access page

Recurring charges are made and managed on the **recurring charges** page, see section 43.37.

43.38 Reservation Questions

43.38.1 Usage

The reservation questions table provides a way to ask users questions when they are making a reservation.

43.38.2 Summary Page

The summary page provides a listing of reservation questions (Figure 43.89). Click the id field in the row of interest to edit.

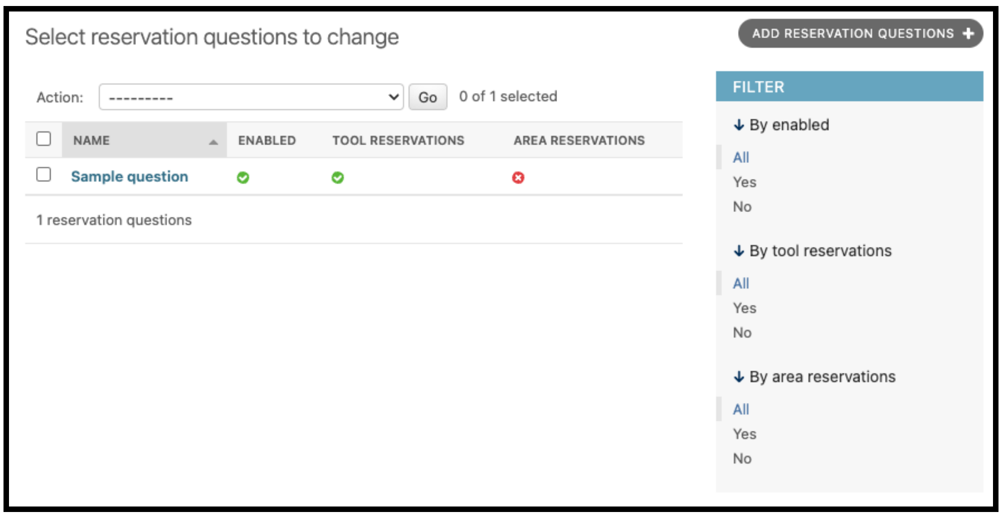


Figure 43.89: *Reservation questions summary page*

43.38.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.90 and Figure 43.91).

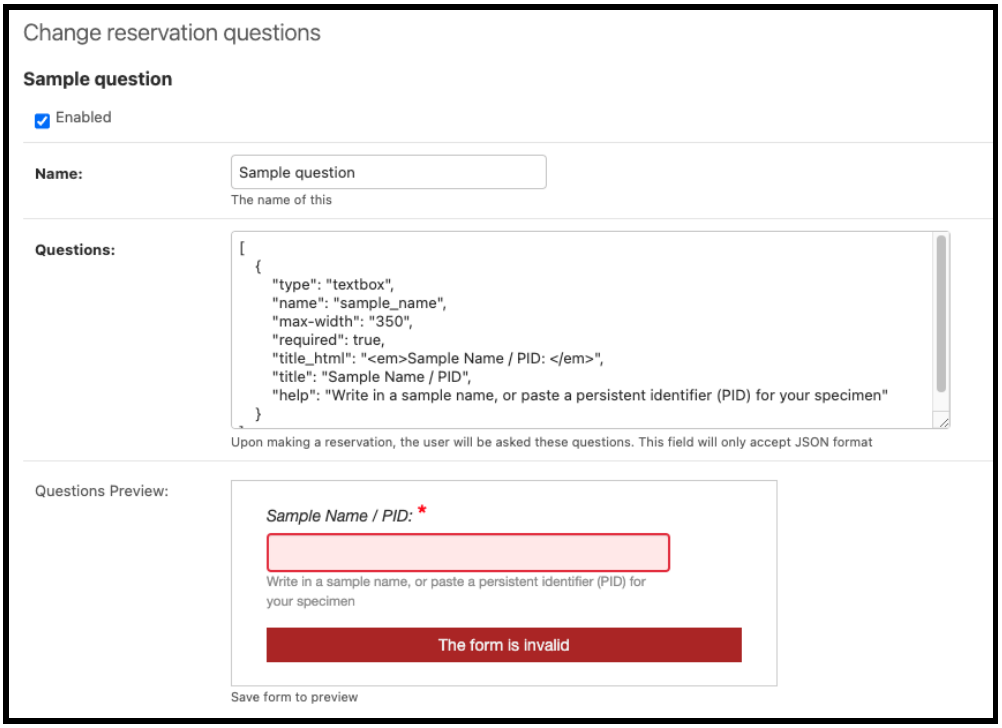


Figure 43.90: *Reservation questions add/edit page part 1*

- Enabled – check this box to enable these reservation questions.
- Name – descriptive name of reservation questions (required).
- Questions – json formatted list of questions to ask users for input when making reservations. The specific format of those questions is discussed in chapter 50.
- Questions preview – displays the preview of what the questions would look like.

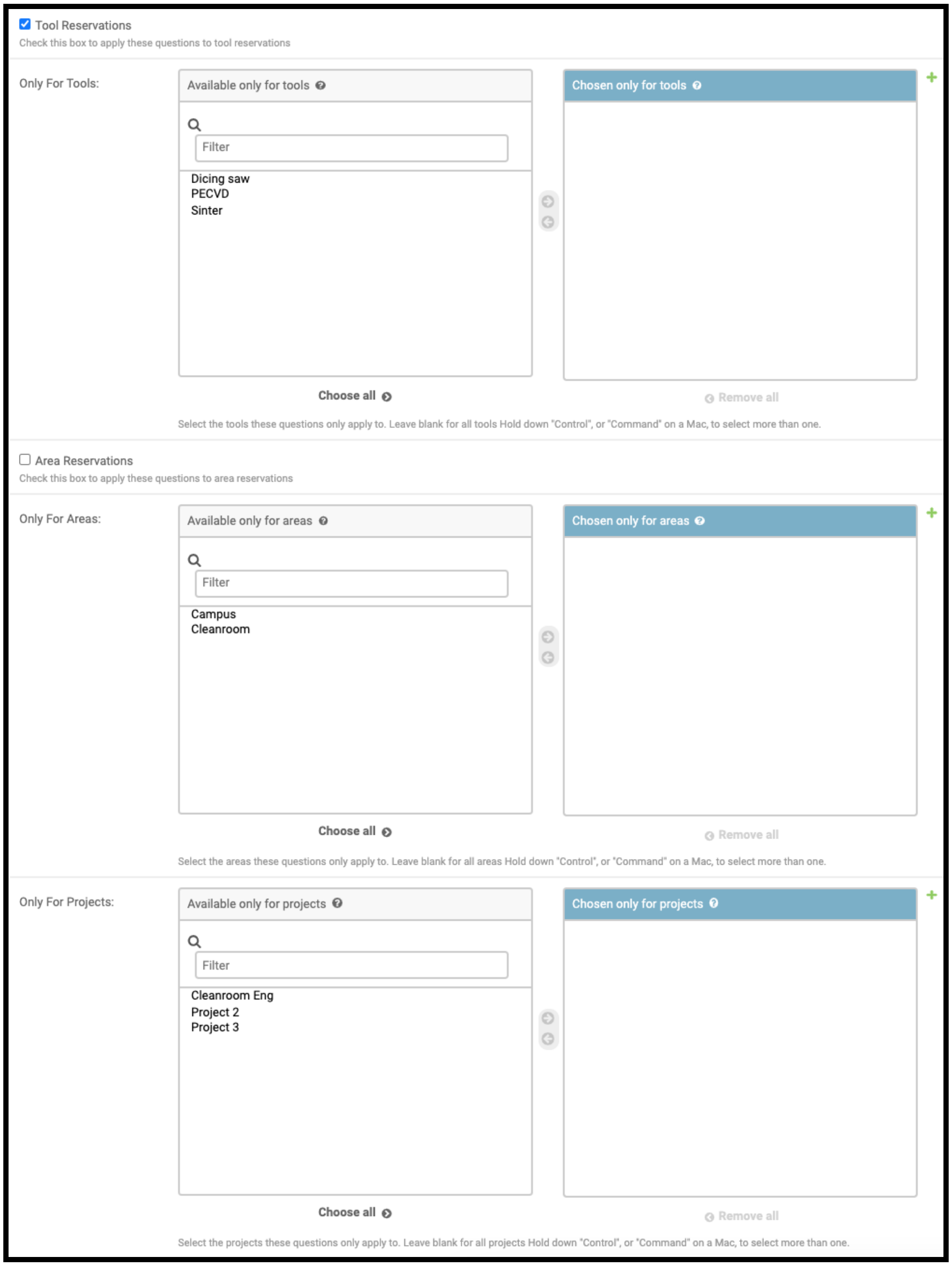


Figure 43.91: *Reservation questions add/edit page part 2*

- Tool reservations – select to apply questions to tool reservations.
- Only For Tools – restrict the tools the questions apply to by selecting them. Leaving blank will apply to all tools.
- Area reservations – select to apply questions to area reservations.
- Only For Areas – restrict the areas the questions apply to by selecting them. Leaving blank will apply to all areas.
- Only For Projects – restrict the reservations the questions apply to by selecting projects. Leaving blank will apply to all projects.

43.38.4 User access page

There is no user access page to create reservation questions.

43.39 Reservations

43.39.1 Usage

The reservations table maintains the association of projects with a parent account and child users. For a user to access NEMO resources the user must be active on a project which is active on an account. A detailed discussion of projects can be found in the Accounts and projects chapter 22.

43.39.2 Summary Page

The summary page provides a listing of reservations (Figure 43.92). Click the id field in the row of interest to edit.

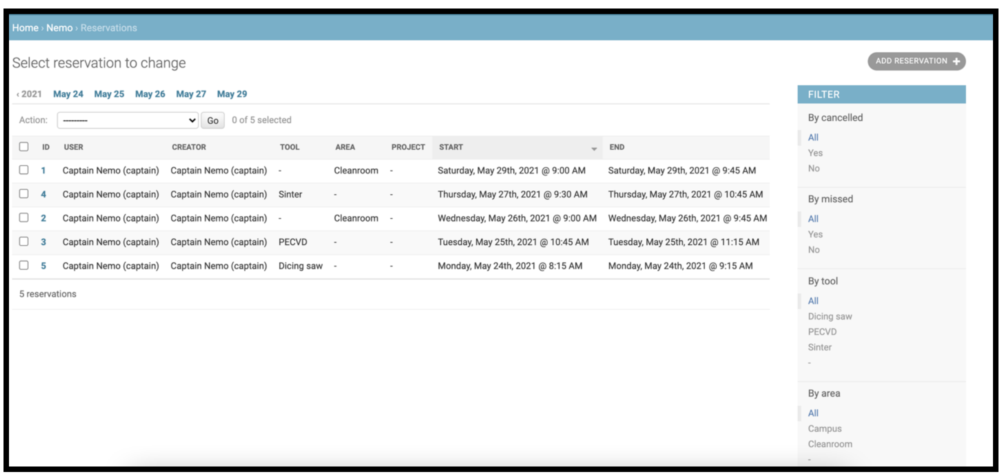


Figure 43.92: *Reservations summary page*

43.39.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.93, Figure 43.94).

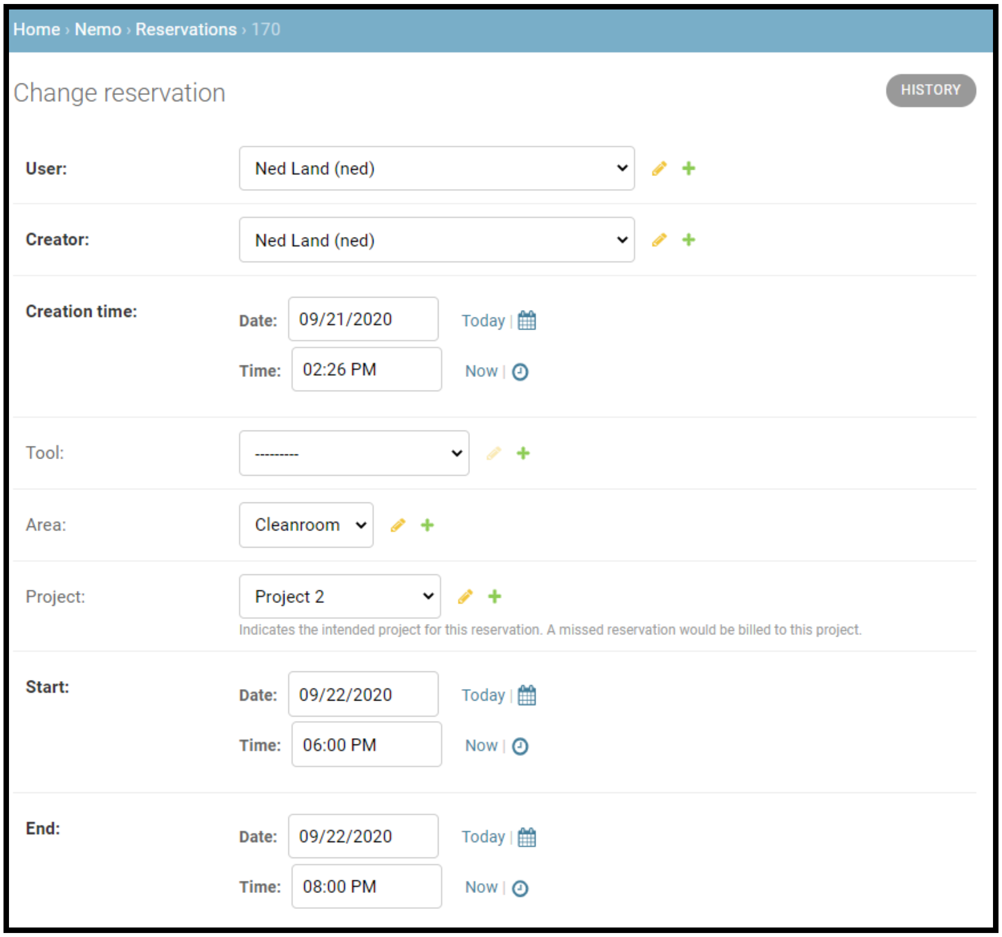


Figure 43.93: *Reservations add/edit page part 1*

- User – select from drop down name of user the reservation is for (required) Users table.
- Creator – select from drop down name of user that created the reservation. (required) Users table.

- Creation time – date/time the reservation was created. (required).
- Tool – select from drop down name of tool reserved. (either a tool or an area must be selected) Tools table.
- Area – select from drop down name of area reserved. (either a tool or an area must be selected) Area table.
- Project – select from drop down name of project to bill reservation to. A missed reservation would be billed to this project.
- Start – date/time the reservation starts. (required).
- End – date/time the reservation ends. (required).

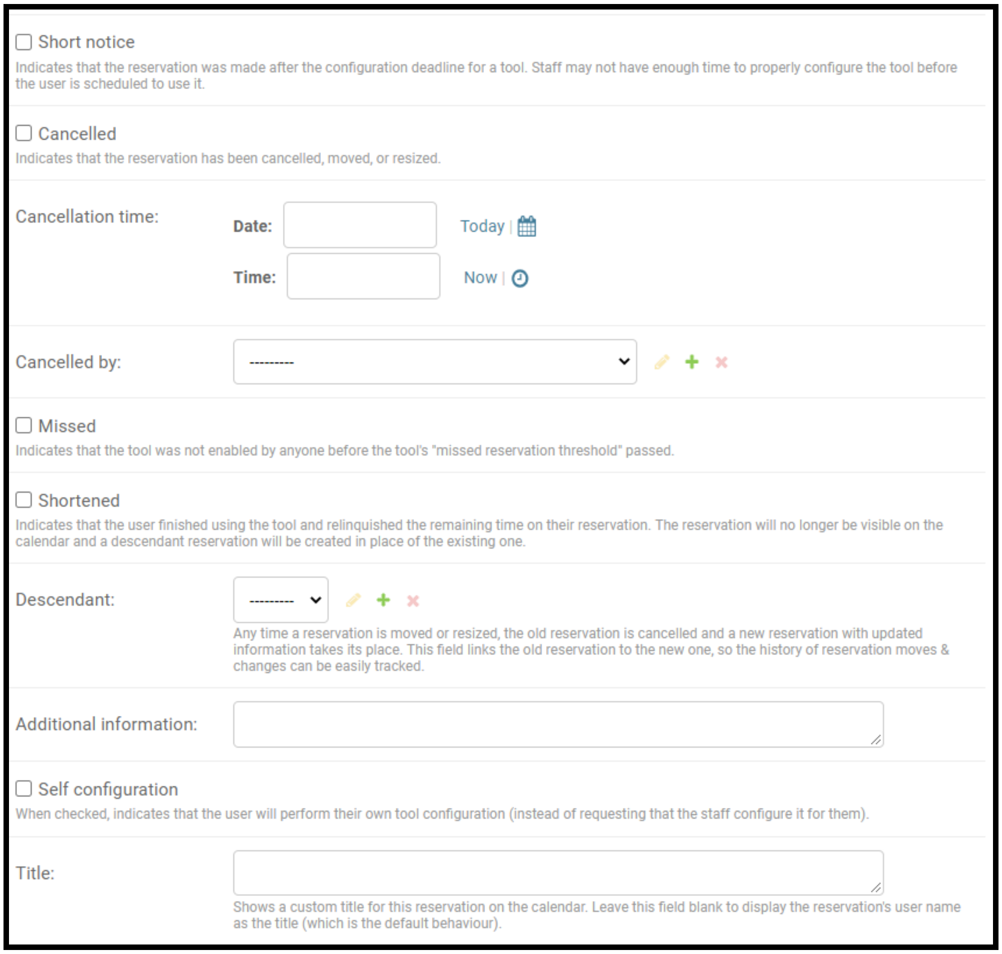


Figure 43.94: *Reservations add/edit page part 2*

- Short notice – indicates that the reservation was made after the configuration deadline for a tool. Staff may not have enough time to properly configure the tool before the user is scheduled to use it.
- Cancelled – indicates that the reservation has been cancelled, moved, or resized.
- Cancellation time – date/time the reservation was changed.

- Cancelled by – select from drop down name of user that changed the reservation Users table.
- Missed – indicates that the tool was not enabled by anyone before the tool's "missed reservation threshold" passed. Missed reservations require a threshold set in the tool table and a timed job to check for missed reservations periodically. Missed reservations are discussed in the reservations section 43.39.
- Shortened – indicates that the user finished using the tool and relinquished the remaining time on their reservation. The reservation will no longer be visible on the calendar and a descendant reservation will be created in place of the existing one.
- Descendant – any time a reservation is moved or resized, the old reservation is cancelled and a new reservation with updated information takes its place. This field links the old reservation to the new one, so the history of reservation moves & changes can be easily tracked.
- Additional information – text that can be provided by a user when making a reservation on a configurable tool.
- Self-configuration – when checked, indicates that the user will perform their own tool configuration (instead of requesting that the staff configure it for them).
- Title – Shows a custom title for this reservation on the calendar. Leave this field blank to display the reservation's username as the title (which is the default behavior).

43.39.4 User access page

Reservations are made and maintained on the **calendar** page, see chapter 5.

43.40 Resource categories

43.40.1 Usage

Resource categories are optional but can be useful for grouping similar resources to make visualization easier. Resource categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no resource categories are defined, they are not displayed on the resources page. Resource categories are discussed in the Resources chapter 33.

43.40.2 Summary Page

The summary page provides a listing of resource categories (Figure 43.95). Click the name field in the row of interest to edit.

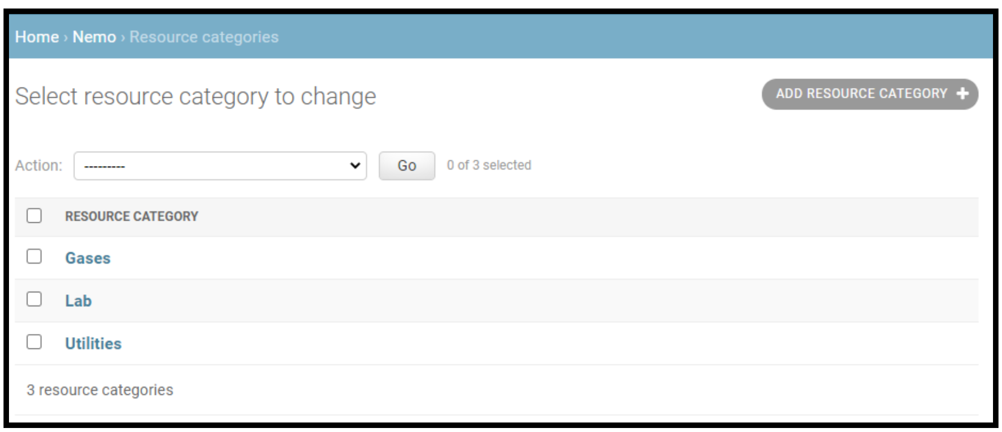


Figure 43.95: *Resource category summary page*

43.40.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.96).

Figure 43.96: *Resource category add/edit page*

- Name – the name can be up to 200 characters (required).

43.40.4 User access page

Resource categories must be setup in this table view but are discussed in the Resources chapter 33.

43.41 Resources

43.41.1 Usage

Resources provide a method to define tool dependencies such as gases, facility spaces, and utilities that can be associated with tools are either required or non-required resources. When a resource is unavailable, users are blocked from using tools or areas that require the resource and notified on tools that with a non-required association. Resources are discussed in the Resources chapter 33.

43.41.2 Summary Page

The summary page provides a listing of resources (Figure 43.97). Click the name field in the row of interest to edit.

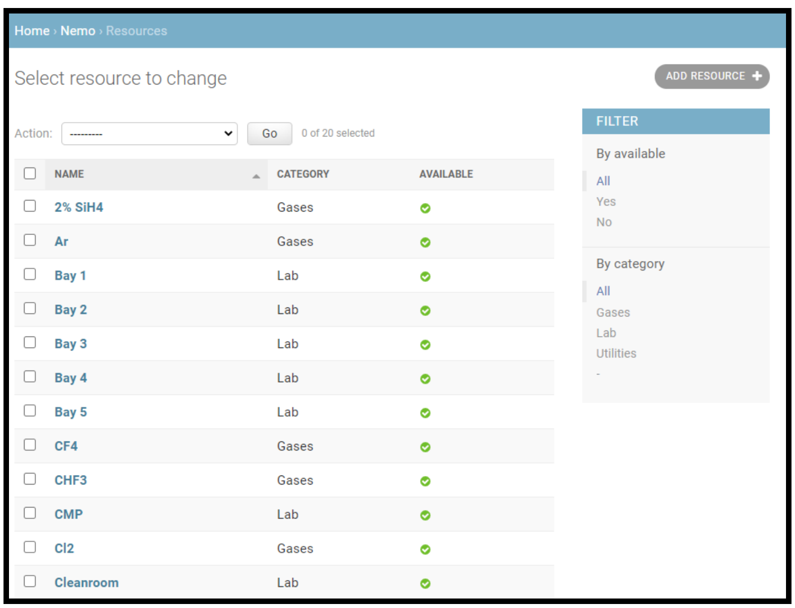


Figure 43.97: *Resources summary page*

43.41.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.98, Figure 43.99).

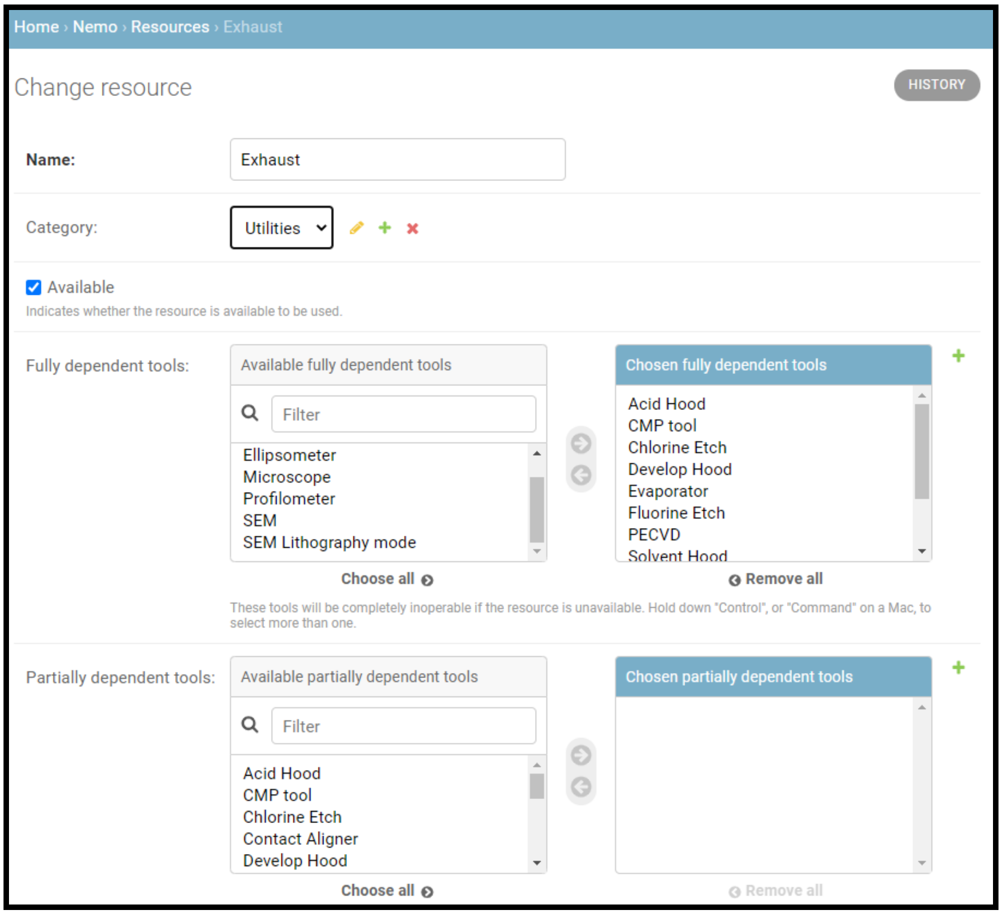


Figure 43.98: *Resources add/edit page part 1*

- Name – the name of the resource can be up to 200 characters (required).
- Category – drop down list used to group resources by similarity. Resource categories table.

- Available – checkbox indicates whether the resource is available to be used.
- Fully dependent tools – These tools will be completely inoperable if the resource is unavailable. Hold down "Control", or "Command" on a Mac, to select more than one. Tools table.
- Partially dependent tools – These tools depend on this resource but can operated at a reduced capacity if the resource is unavailable. Hold down "Control", or "Command" on a Mac, to select more than one. Tools table.

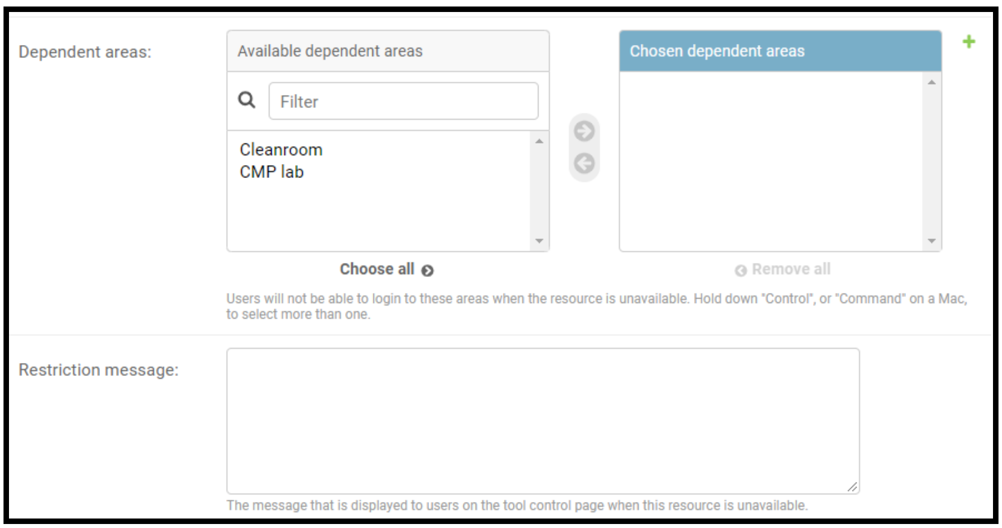


Figure 43.99: *Resources add/edit page part 2*

- Dependent Areas – Users will not be able to login to these areas when the resource is unavailable. Hold down "Control", or "Command" on a Mac, to select more than one. Areas table.
- Restriction message – The message that is displayed to users on the tool control page when this resource is unavailable.

43.41.4 User access page

Resources must be setup in this table view but are managed in the Resources chapter 33.

43.42 Safety categories

43.42.1 Usage

Safety categories are used to organize Safety items. Safety items are discussed in the Safety items chapter 10.

43.42.2 Summary Page

The summary page provides a listing of safety categories (Figure 43.100). Click the name field in the row of interest to edit.

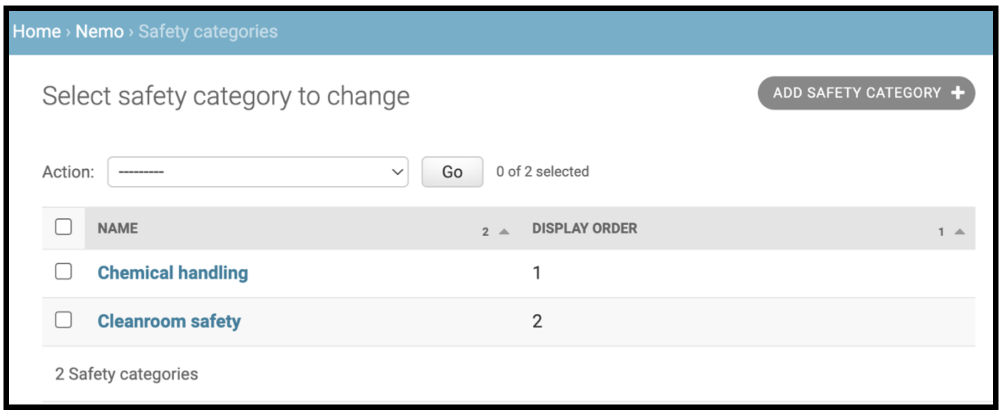


Figure 43.100: *Safety categories summary page*

43.42.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.101).

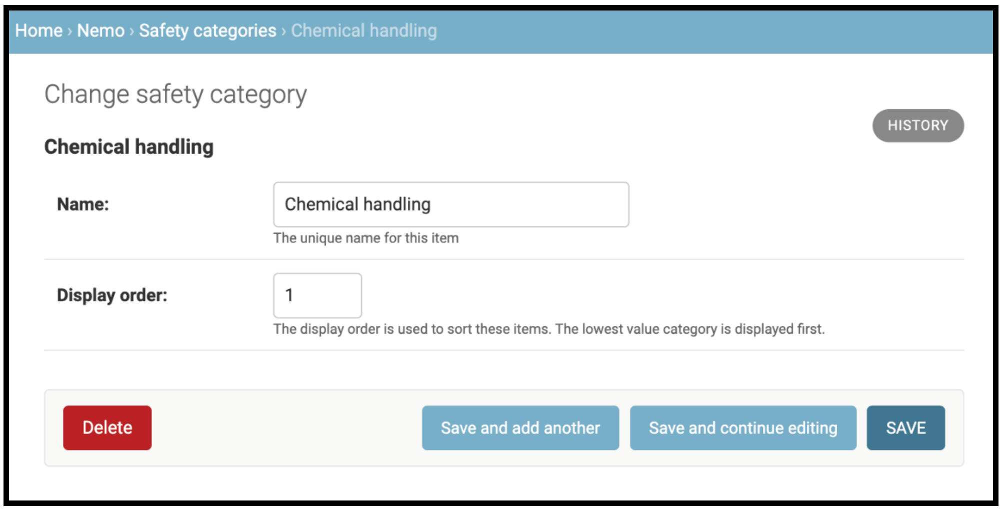


Figure 43.101: *Safety categories add/edit page*

- Name – the name of the safety category. (required).
- Display order – the order in which to display the category. The lowest value is displayed first.

43.42.4 User access page

Safety categories are discussed in Safety items chapter 10.

43.43 Safety issues

43.43.1 Usage

The safety issues table maintains a list and status of all safety issues reported through the safety page. Normally this table will not need to be edited directly.

43.43.2 Summary Page

The summary page provides a listing of safety issues (Figure 43.102). Click the ID field in the row of interest to edit.

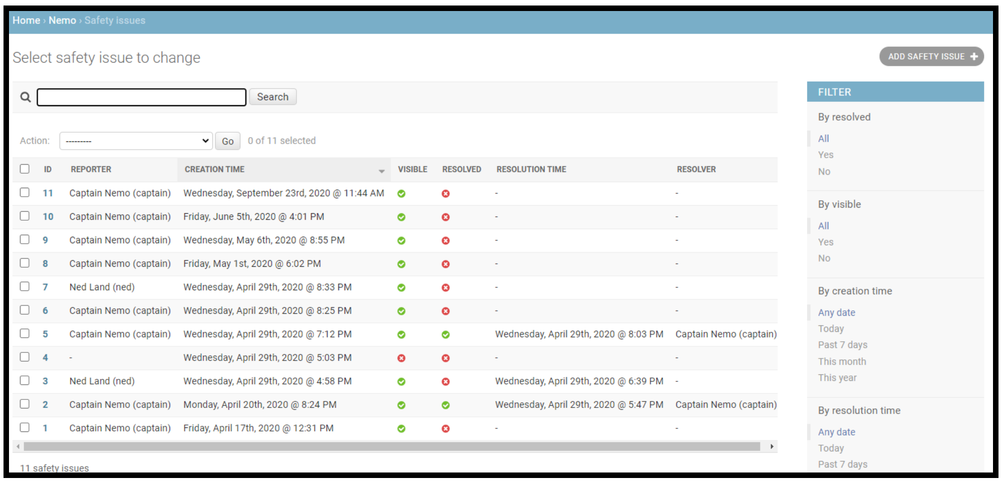


Figure 43.102: *Safety issues summary page*

43.43.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.103).

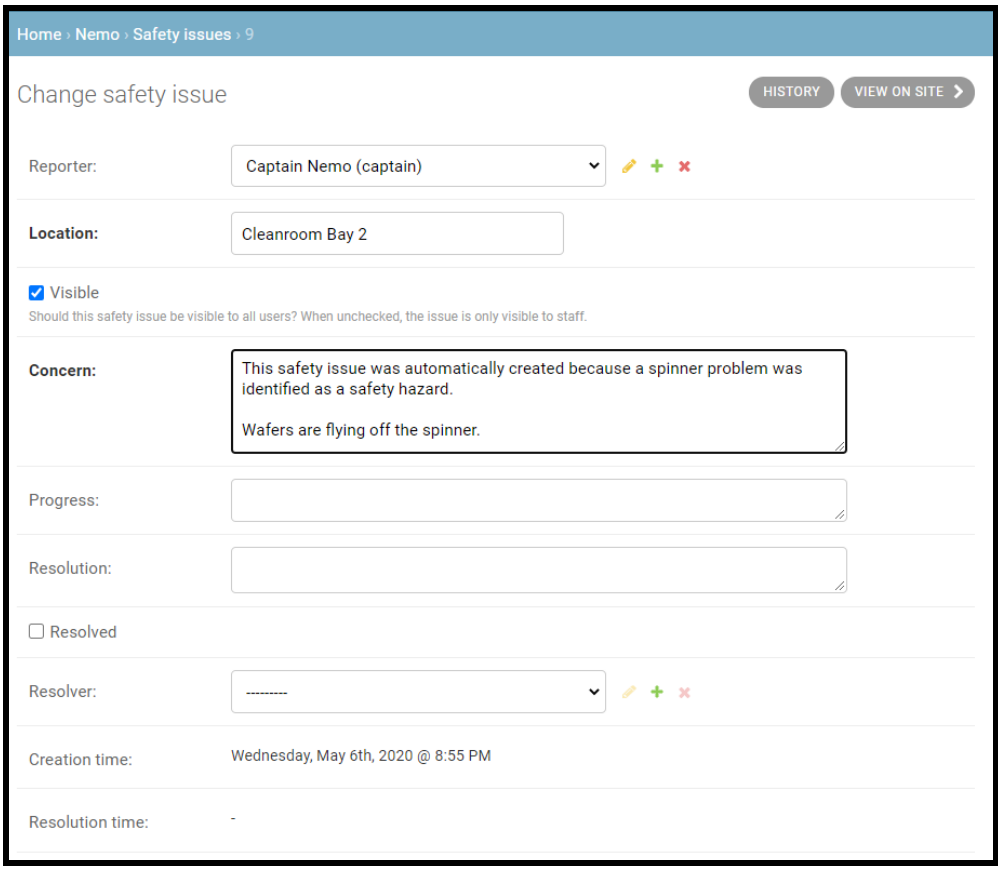


Figure 43.103: *Safety issues add/edit page*

- Reporter – drop down list select user who reported problem. (this is optional for anonymous reporting) Users table.
- Location – text to report where the problem was observed. (required).
- Visible – checkbox, when unchecked, the issue is only visible to staff.

- Concern – narrative of safety issue found.
- Progress – narrative of actions in progress to address issue.
- Resolution – narrative of final action to address issue.
- Resolved – checkbox to indicate if the safety issue has been resolved.
- Resolver – drop down list select user who resolved the problem. Users table.
- Creation time – information only, date/time issue was created.
- Resolution time – information only, date/time issue was resolved.

43.43.4 User access page

All safety functions are detailed in the safety chapter 10.

43.44 Safety items

43.44.1 Usage

Safety items are used to provide Safety information to users, organized in categories. Safety items are discussed in Safety items chapter 10.

43.44.2 Summary Page

The summary page provides a listing of safety items (Figure 43.104). Click the name field in the row of interest to edit.

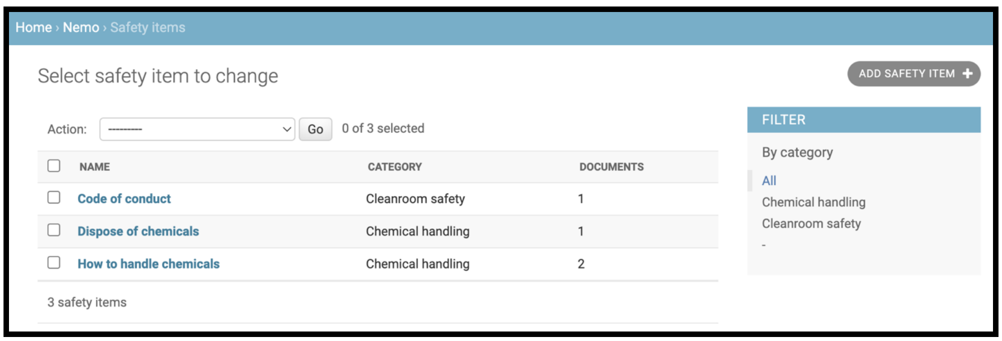


Figure 43.104: *Safety items summary page*

43.44.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.105).

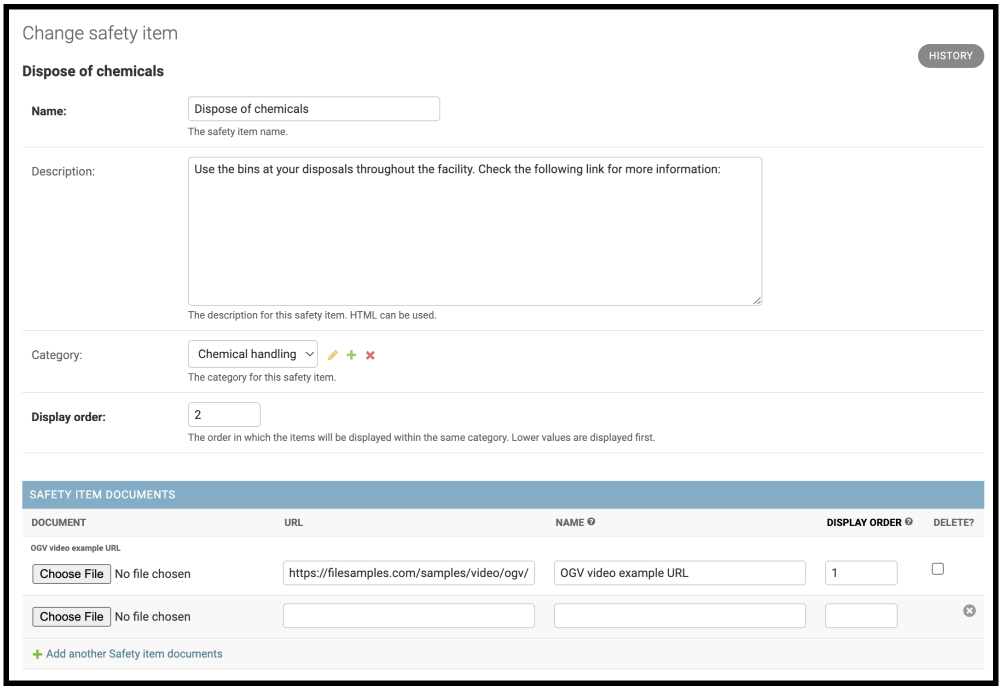


Figure 43.105: *Safety items add/edit page*

- Name – the name of the safety item. (required).
- Description – the description for this safety item. HTML syntax can be used.
- Category – the category to display this safety item in.
- Display order – the order in which to display this item within the category. The lowest value is displayed first.

- Safety item documents – the list of documents for this safety item. Documents can be links or files to be uploaded in NEMO. Optionally, a name can also be entered. If not provided, it will default to the file name.

43.44.4 User access page

Safety items are discussed in Safety items chapter 10.

43.45 Safety trainings

43.45.1 Usage

Safety trainings are optional and provide a way to keep track of user safety trainings the user has taken. They are meant to be used as a checklist.

43.45.2 Summary Page

The summary page provides a listing of safety trainings (Figure 43.106). Click the name field in the row of interest to edit.

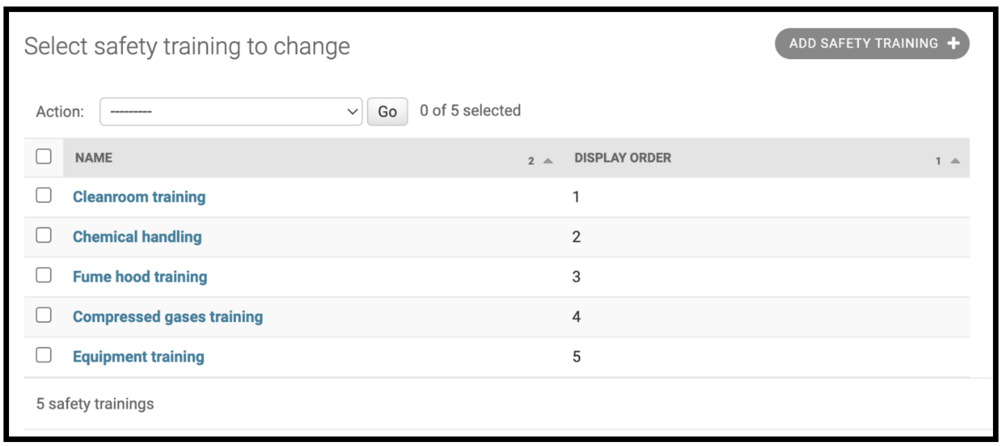


Figure 43.106: *Safety trainings summary page*

43.45.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.107).

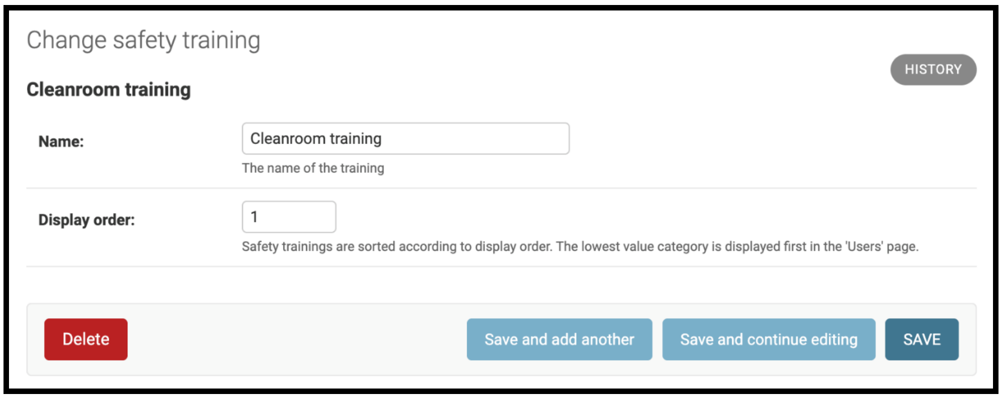


Figure 43.107: *Safety trainings add/edit page*

- Name – the name of the safety training. (required)
- Display order – the order to display this safety training in. (required)

43.45.4 User access page

There is no user access page available for onboarding phases. However, they are displayed as a checklist when creating/editing Users, see chapter 39.

43.46 Scheduled outage categories

43.46.1 Usage

Scheduled outage categories are optional but can be useful for binning outages aiding in future analysis and trending. Scheduled outage categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no scheduled outage categories are defined, they are not displayed on the scheduled outages page. Scheduled outage categories are discussed in the scheduled outages table, see subsection 5.4.13.

43.46.2 Summary Page

The summary page provides a listing of scheduled outage categories (Figure 43.108). Click the name field in the row of interest to edit.

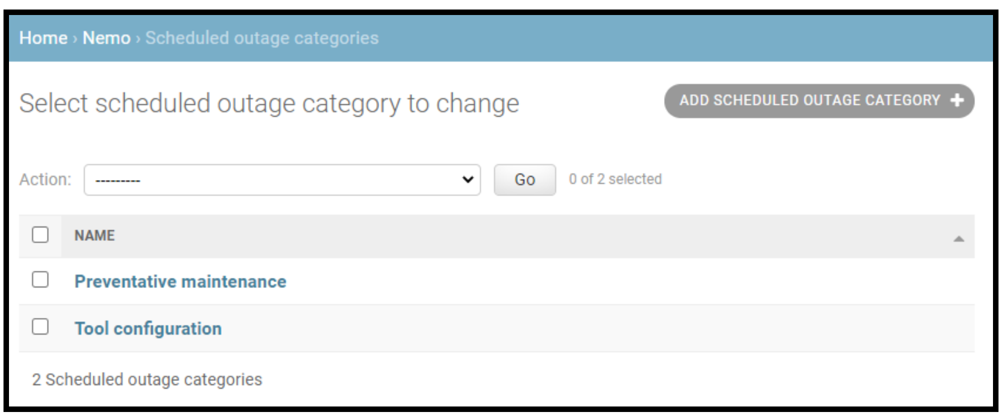


Figure 43.108: *Scheduled outage categories summary page*

43.46.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.109).

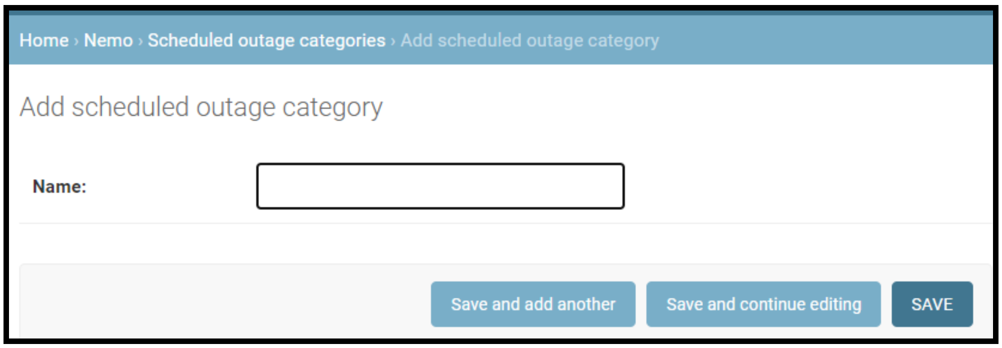


Figure 43.109: *Scheduled outage categories add/edit page*

- Name – the name can be up to 200 characters (required).

43.46.4 User access page

There is no user access page for scheduled outage categories however, scheduled outage categories usage are discussed in the scheduled outages table section.

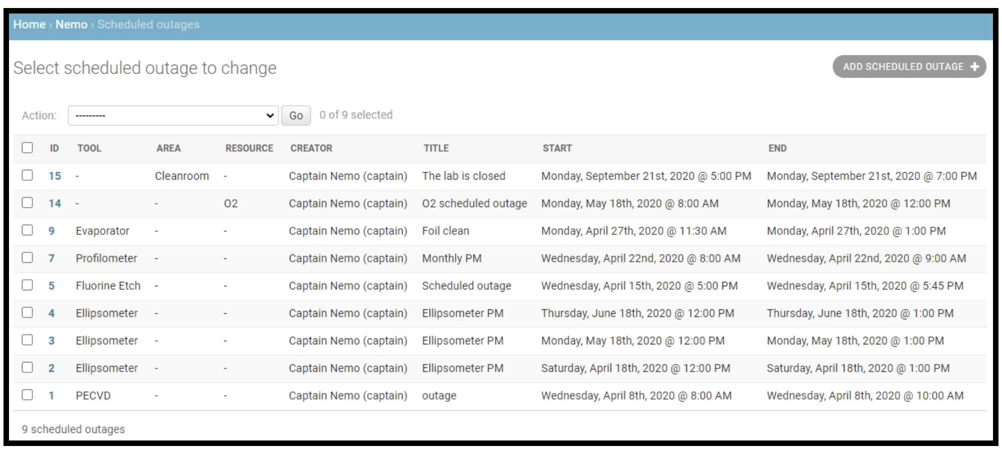
43.47 Scheduled outages

43.47.1 Usage

Scheduled outages table records outages for tools, areas, and resources. A scheduled outage is a planned shutdown that triggers automatically at the designated time and will clear automatically at the designated end time. Scheduled outages are useful for planned activities such as gas bottle changes or tool maintenance that happens in a predictable way. Scheduled outages are created and maintained on the calendar and the resource pages.

43.47.2 Summary Page

The summary page provides a listing of scheduled outages (Figure 43.110). Click the id field in the row of interest to edit.


Home › Nemo › Scheduled outages

Select scheduled outage to change

ADD SCHEDULED OUTAGE

Action: --------- Go 0 of 9 selected

ID	TOOL	AREA	RESOURCE	CREATOR	TITLE	START	END
15	-	Cleanroom	-	Captain Nemo (captain)	The lab is closed	Monday, September 21st, 2020 @ 5:00 PM	Monday, September 21st, 2020 @ 7:00 PM
14	-	-	O2	Captain Nemo (captain)	O2 scheduled outage	Monday, May 18th, 2020 @ 8:00 AM	Monday, May 18th, 2020 @ 12:00 PM
9	Evaporator	-	-	Captain Nemo (captain)	Foil clean	Monday, April 27th, 2020 @ 11:30 AM	Monday, April 27th, 2020 @ 1:00 PM
7	Profilometer	-	-	Captain Nemo (captain)	Monthly PM	Wednesday, April 22nd, 2020 @ 8:00 AM	Wednesday, April 22nd, 2020 @ 9:00 AM
5	Fluorine Etch	-	-	Captain Nemo (captain)	Scheduled outage	Wednesday, April 15th, 2020 @ 5:00 PM	Wednesday, April 15th, 2020 @ 5:45 PM
4	Ellipsometer	-	-	Captain Nemo (captain)	Ellipsometer PM	Thursday, June 18th, 2020 @ 12:00 PM	Thursday, June 18th, 2020 @ 1:00 PM
3	Ellipsometer	-	-	Captain Nemo (captain)	Ellipsometer PM	Monday, May 18th, 2020 @ 12:00 PM	Monday, May 18th, 2020 @ 1:00 PM
2	Ellipsometer	-	-	Captain Nemo (captain)	Ellipsometer PM	Saturday, April 18th, 2020 @ 12:00 PM	Saturday, April 18th, 2020 @ 1:00 PM
1	PECVD	-	-	Captain Nemo (captain)	outage	Wednesday, April 8th, 2020 @ 8:00 AM	Wednesday, April 8th, 2020 @ 10:00 AM

9 scheduled outages

Figure 43.110: *Scheduled outages summary page*

43.47.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.111).

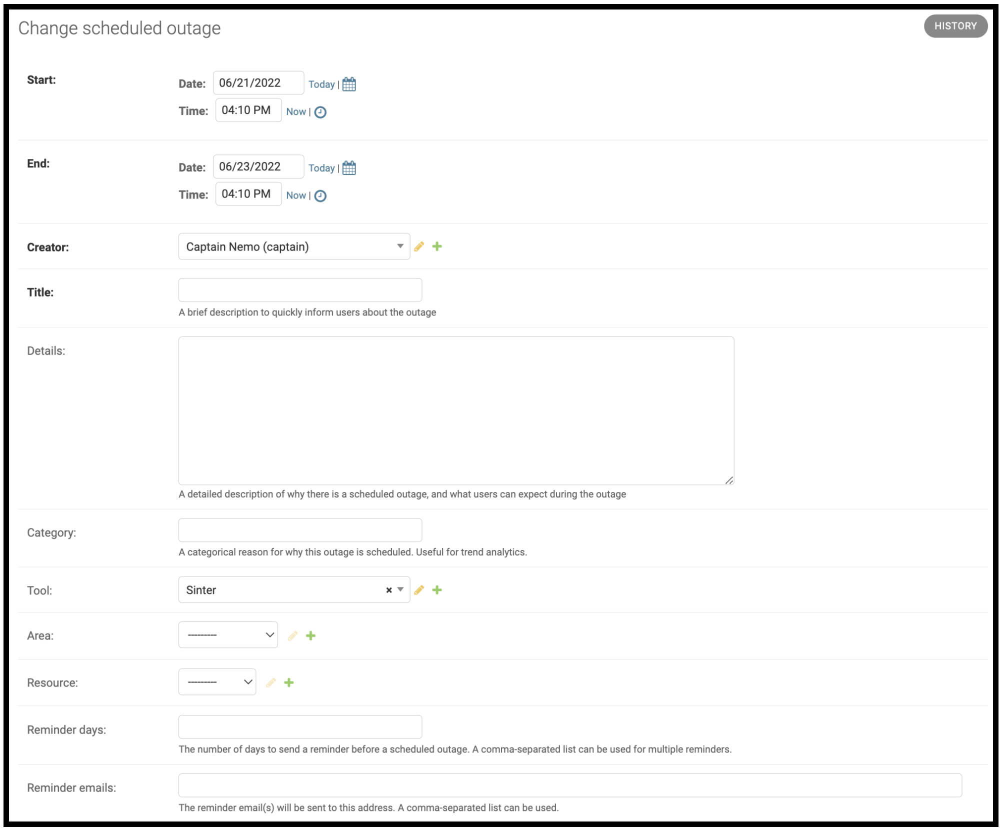


Figure 43.111: *Scheduled outages add/edit page*

- Start – date/time scheduled outage will start. (required).
- End – date/time scheduled outage will end. (required).
- Creator – drop down list select user that created the scheduled outage. (required) Users table.

- Title – a brief description to quickly inform users about the outage. (required).
- Details – a detailed description of why there is a scheduled outage, and what users can expect during the outage.
- Category – grouping similar outages for future analysis. Scheduled outage categories table.
- Tool – drop down list select tool. (required to have one tool, area, or resource selected) Tools table.
- Area – drop down list select tool. (required to have one tool, area, or resource selected) Areas table.
- Resource – drop down list select tool. (required to have one tool, area, or resource selected) Resources table.
- Reminder days – comma separated list of days prior to the start of the outage to send reminders.
- Reminder emails – comma separated list of email addresses to sent the reminders to.

43.47.4 User access page

Scheduled outages are created and maintained on the calendar and the resource pages.

43.48 Staff absence types

43.48.1 Usage

Staff absence types are used to represent the different types of absences for staff members. Examples would be Annual leave, Sick leave etc. Absence types are used to create absences in Detailed administration → Staff absences section 43.49 and in the Staff status section 7.4.

43.48.2 Summary Page

The summary page provides a listing of staff absence types (Figure 43.112). Click the name field in the row of interest to edit.

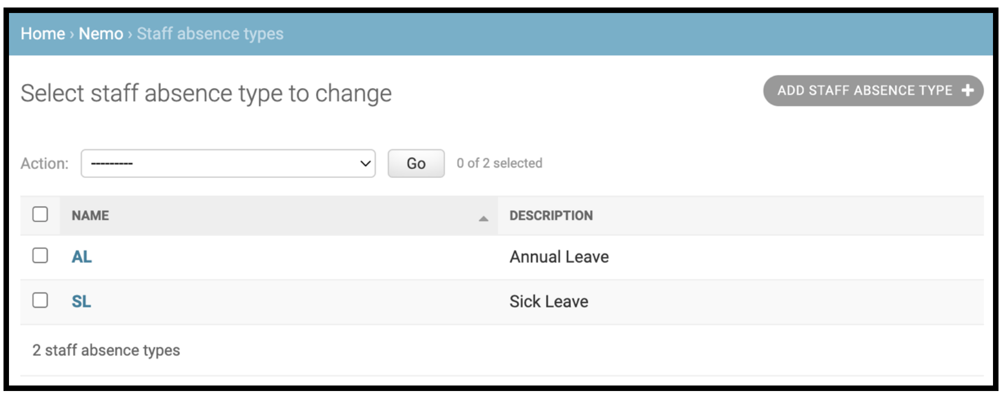


Figure 43.112: *Staff absence types summary page*

43.48.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.113).

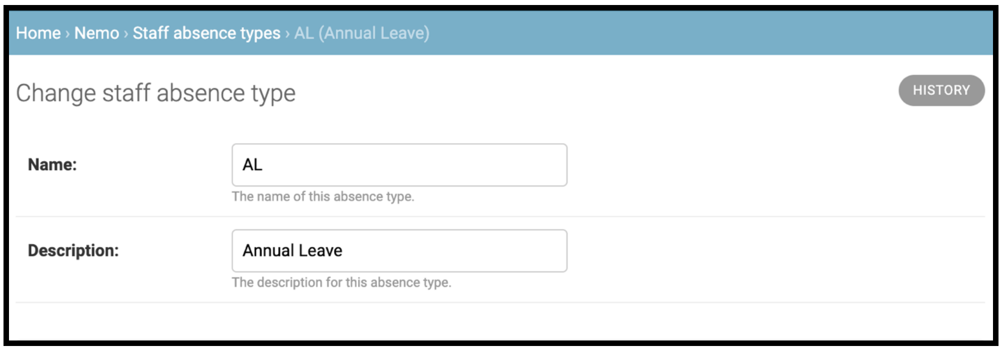


Figure 43.113: *Staff absence types add/edit page*

- Name – name of the absence type
- Description – longer description of the absence type

43.48.4 User access page

There is no user access page to create staff absence types. However, staff absence types are used on the absence type dropdown of the Create a new absence page.

43.49 Staff absences

43.49.1 Usage

Staff absences record when staff members are absent or on leave. Absences are discussed in detail on the Staff status page, see section 7.4.

43.49.2 Summary Page

The summary page provides a listing of staff absences (Figure 43.114). Click the creation time field in the row of interest to edit.

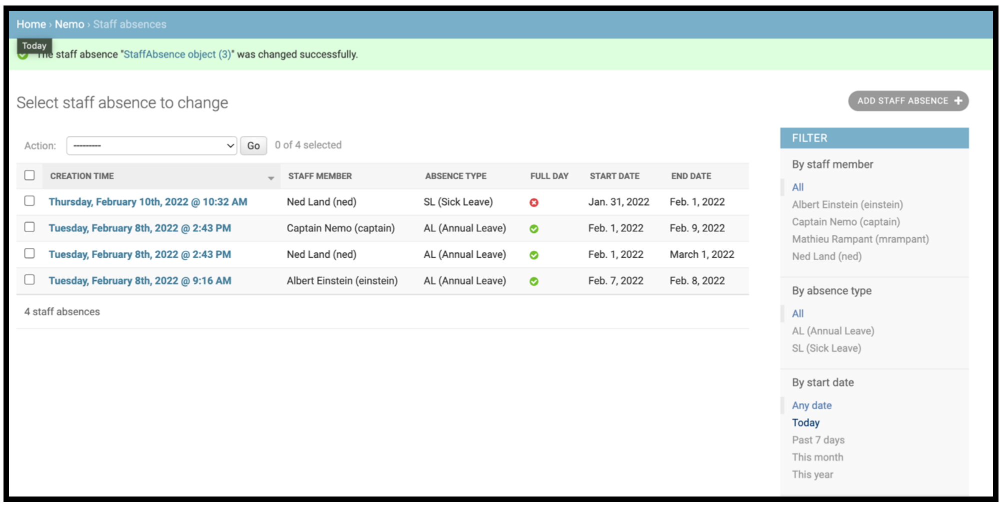


Figure 43.114: *Staff absences summary page*

43.49.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.115).

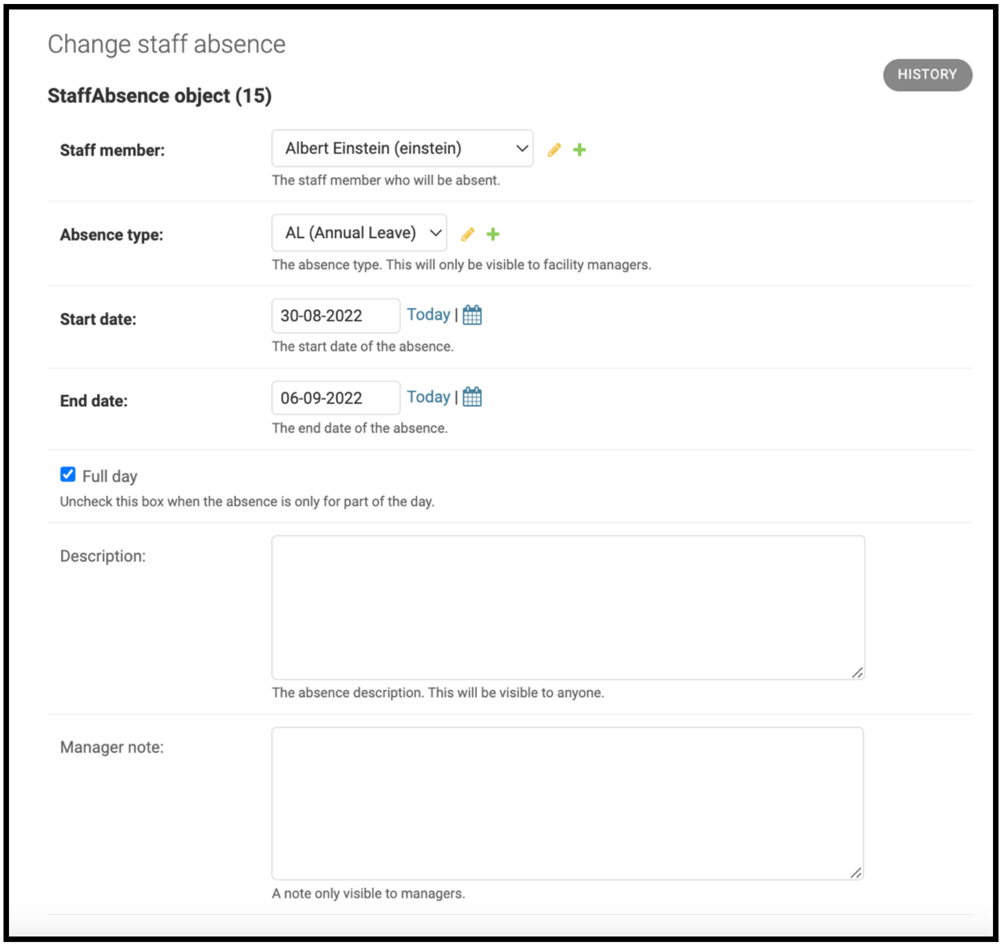


Figure 43.115: *Staff absence add/edit page*

- Staff member – the staff member that will be absent. This is not a reference to a user but rather a reference to Staff availability, see section 43.51.
- Absence type – the absence type as defined in Staff absence types, see

section 43.48.

- Start date – the start date of the staff absence.
- End date – the end date of the staff absence.
- Full day – whether the absence is for the whole day or partial.
- Description – the absence description, which will be shown to all users. Use this field to specify absence details, for example “Out until 2pm”.
- Manager note – a note only visible to facility managers.

43.49.4 User access page

Staff absences can be created by facility managers in the staff status page of the status dashboard.

43.50 Staff assistance requests

43.50.1 Usage

Staff assistance requests can be made by anyone not staff to request help. Staff assistance requests are discussed in detail on the Staff assistance request page, see section 8.4.

43.50.2 Summary Page

The summary page provides a listing of staff assistance requests (Figure 43.116). Click the user field in the row of interest to edit.

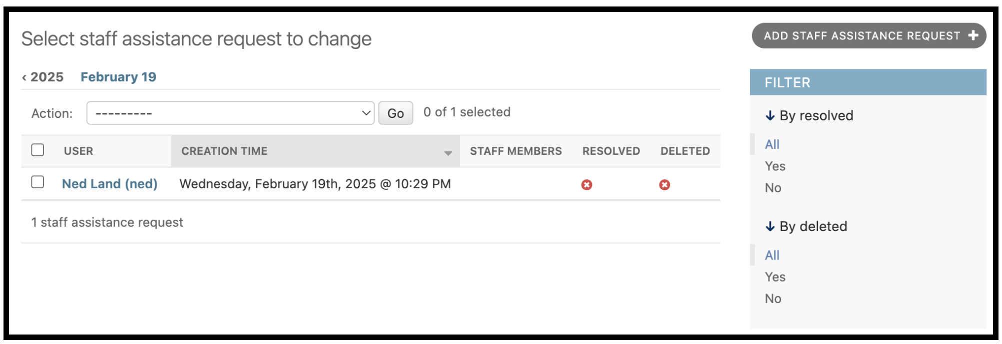


Figure 43.116: *Staff assistance request summary page*

43.50.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.117).

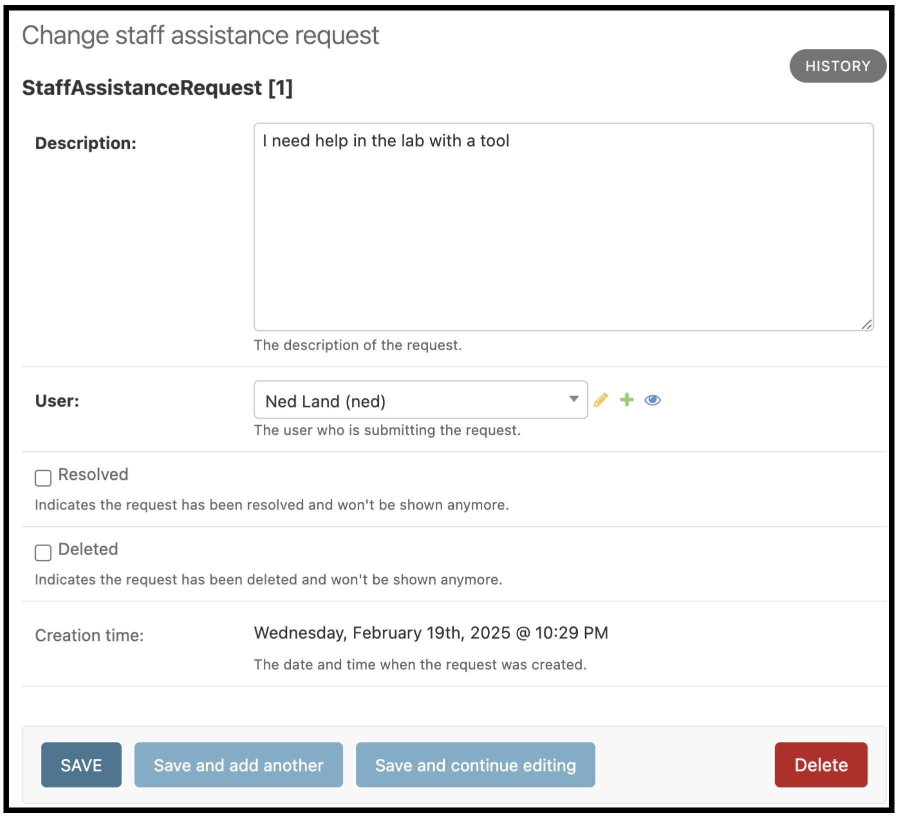


Figure 43.117: *Staff assistance request add/edit page*

- Description – the description of the user's request.
- User – the user who created this staff assistance request.
- Resolved – whether this request has been resolved yet.
- Deleted – whether this request has been deleted.

43.50.4 User access page

Staff assistance requests are discussed in section 8.4

43.51 Staff availability

43.51.1 Usage

The staff availability provides a place to set staff working categories (shifts for examples), working days, and working hours. It is used when creating staff absences.

43.51.2 Summary Page

The summary page provides a listing of staff availabilities (Figure 43.118). Click the staff member field in the row of interest to edit.

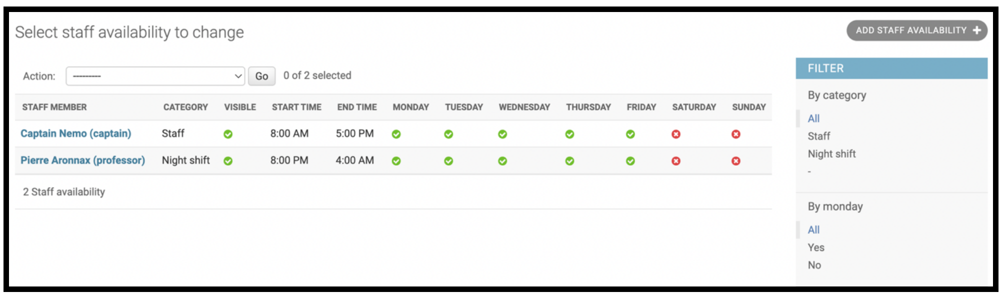


Figure 43.118: *Staff availability summary page*

43.51.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.119).

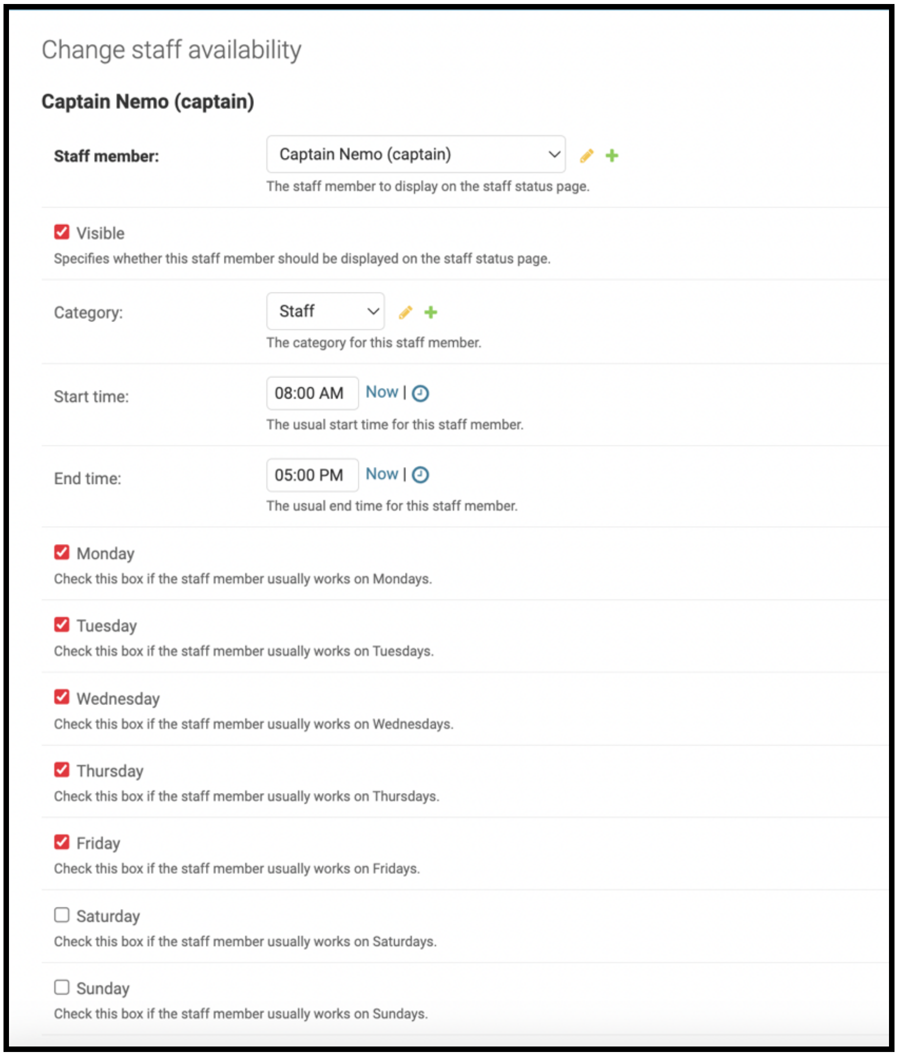


Figure 43.119: *Staff availability add/edit page*

- Staff member – the staff member to appear in the staff status list.

- Visible – uncheck this box to hide the availability of this staff from the staff status page.
- Category – the staff category that will be displayed on the staff status.
- Start time – the typical daily start time of the staff member (optional).
- End time – the typical daily end time of the staff member (optional.
- Monday – whether the staff member typically works on Mondays.
- Tuesday – whether the staff member typically works on Tuesdays.
- Wednesday – whether the staff member typically works on Wednesdays.
- Thursday – whether the staff member typically works on Thursdays.
- Friday – whether the staff member typically works on Fridays.
- Saturday – whether the staff member typically works on Saturdays.
- Sunday – whether the staff member typically works on Sundays.

43.51.4 User access page

There is no user access page to create staff availabilities. However, staff availabilities are used on the staff member dropdown of the Create a new absence page.

43.52 Staff availability categories

43.52.1 Usage

Staff availability categories are optional but can be useful for grouping types of staff on the Staff Status page, see section 7.4. Staff availability categories, if used, must be created in this table view and can be any text name. Any number can be defined. If no categories are defined, all staff will be listed in alphabetical order.

43.52.2 Summary Page

The summary page provides a listing of staff availability categories (Figure 43.120). Click the name field in the row of interest to edit.

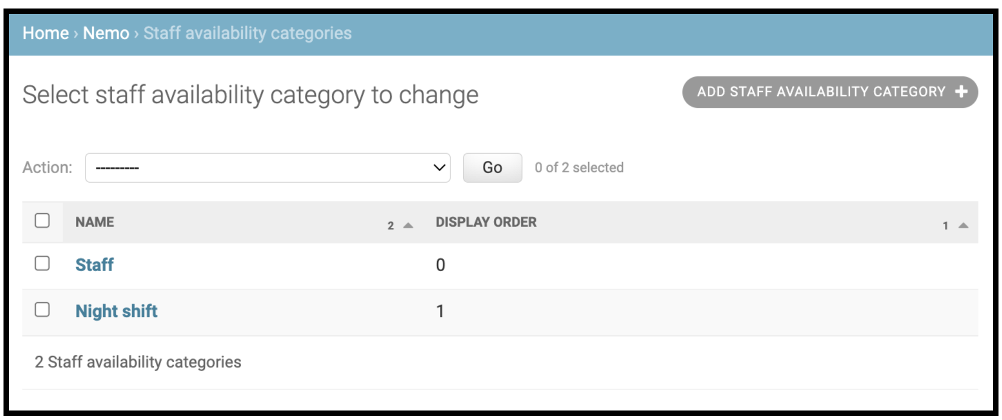


Figure 43.120: *Staff availability categories summary page*

43.52.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.121).

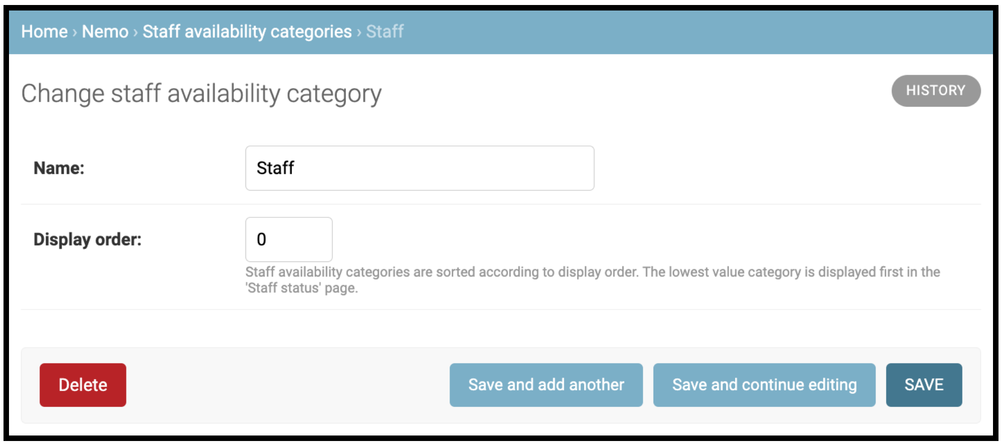


Figure 43.121: *Staff availability categories add/edit page*

- Name – the name can be up to 200 characters (required).
- Name – Display order – Staff availability categories are sorted according to display order. The lowest value category is displayed first in the 'Staff status' page. (required)

43.52.4 User access page

There is no user access page to create staff availability categories. However, the categories are displayed on the Staff Status page, see section 7.4.

43.53 Staff charges

43.53.1 Usage

The staff charges table records the time that a staff member has performed work on behalf of another user. Staff charges are detailed in the staff charges section 32.1.

43.53.2 Summary Page

The summary page provides a listing of staff charges (Figure 43.122). Click the id field in the row of interest to edit.

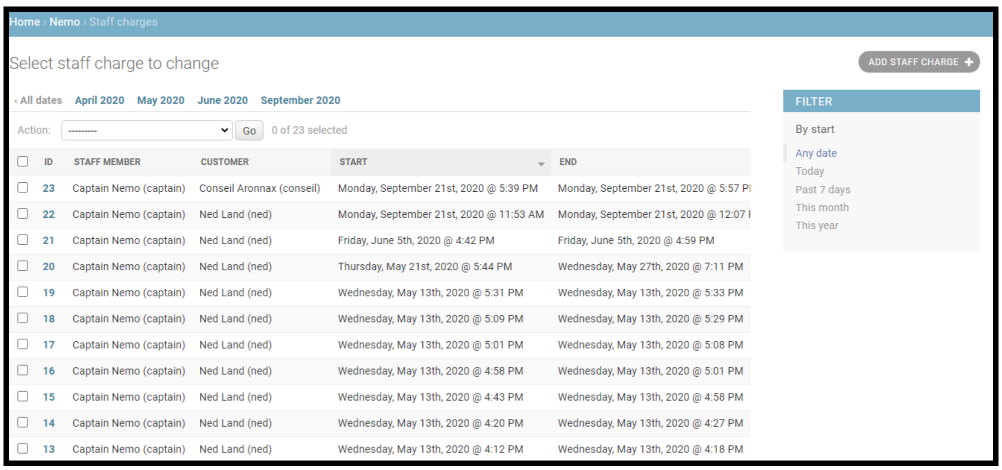


Figure 43.122: *Staff charges summary page*

43.53.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.123).

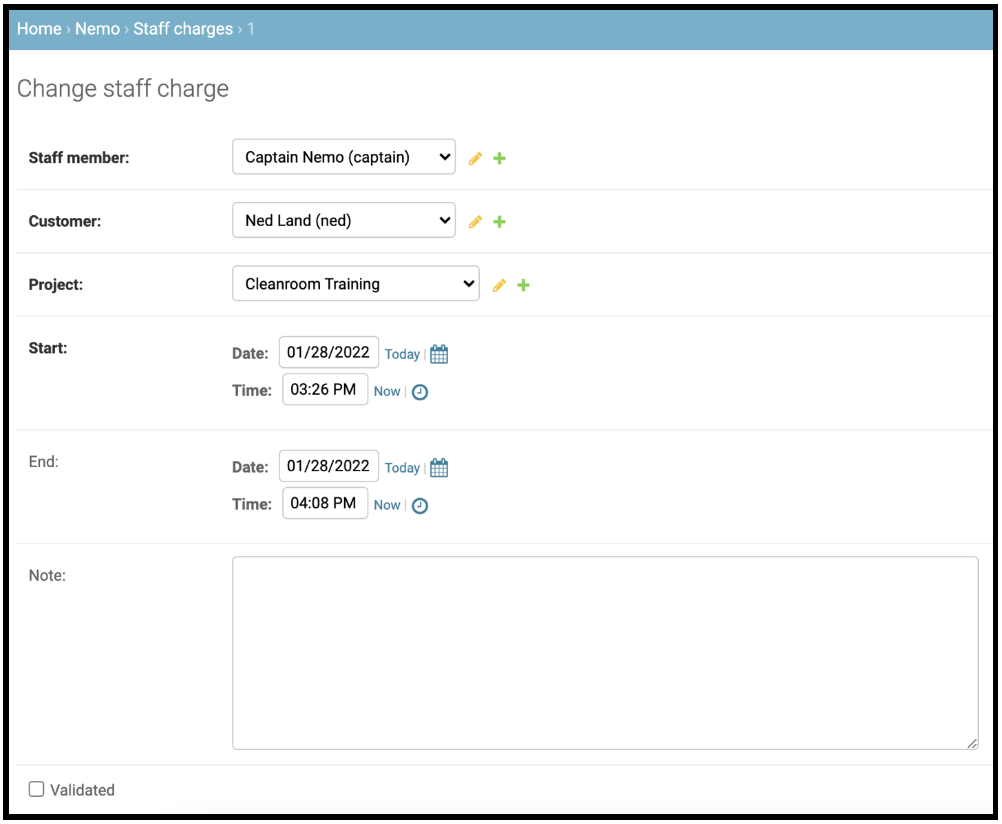


Figure 43.123: *Staff charges add/edit page*

- Staff member – drop down list select staff user that will perform the work. (required) Users table.
- Customer – drop down list select user that work will be billed to. (required) Users table.
- Project – drop down list select project to charge against. (required) Projects table.

- Start – date/time scheduled outage will start. (required).
- End – date/time scheduled outage will end.
- Note – text description of the charge.
- Validated – checkbox to indicate if a staff member has confirmed the charge is valid and correct.

43.53.4 User access page

Staff charges are created and managed on the staff charges page, see section 32.1.

43.54 Staff knowledge base categories

43.54.1 Usage

Staff knowledge base categories are used to organize knowledge base items. Knowledge base items are discussed in the Knowledge base chapter 13.

43.54.2 Summary Page

The summary page provides a listing of staff knowledge base categories (Figure 43.124). Click the name field in the row of interest to edit.

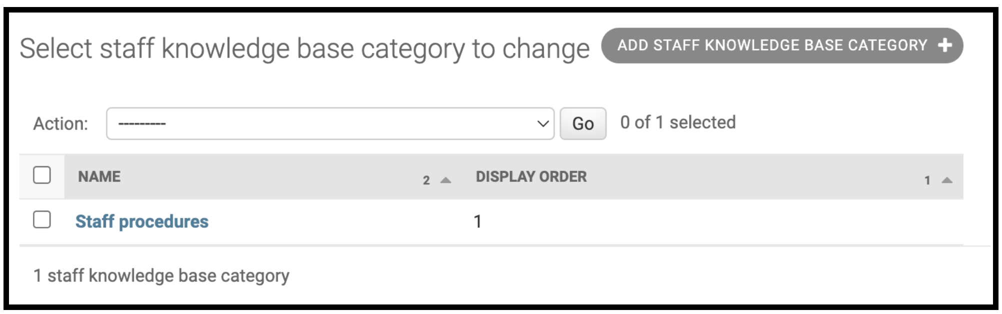


Figure 43.124: *Staff knowledge base categories summary page*

43.54.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.125).

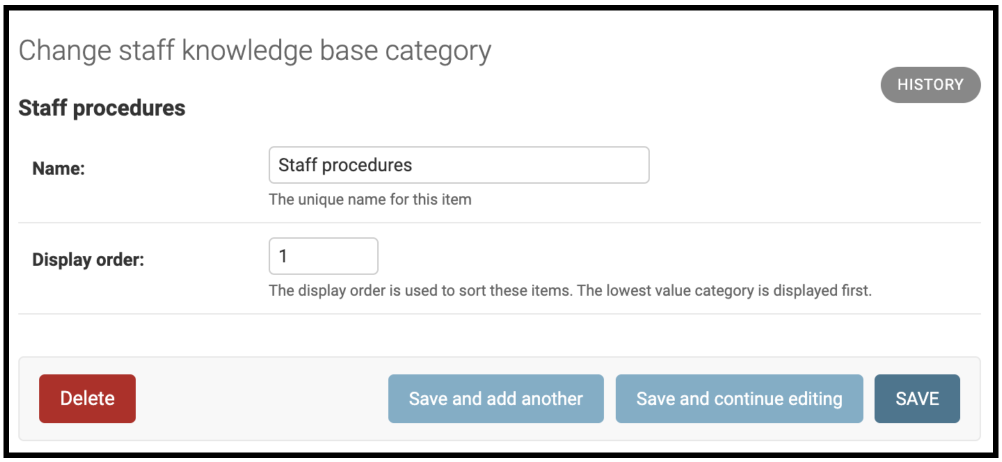


Figure 43.125: *Staff knowledge base categories add/edit page*

- Name – the name of the knowledge base category. (required).
- Display order – the order in which to display the category. The lowest value is displayed first.

43.54.4 User access page

Staff knowledge base categories are discussed in the Knowledge base chapter 13.

43.55 Staff knowledge base items

43.55.1 Usage

Staff knowledge base items are used to provide information to staff, organized in categories. Knowledge base items are discussed in the Knowledge base chapter 13.

43.55.2 Summary Page

The summary page provides a listing of staff knowledge base items (Figure 43.126). Click the name field in the row of interest to edit.

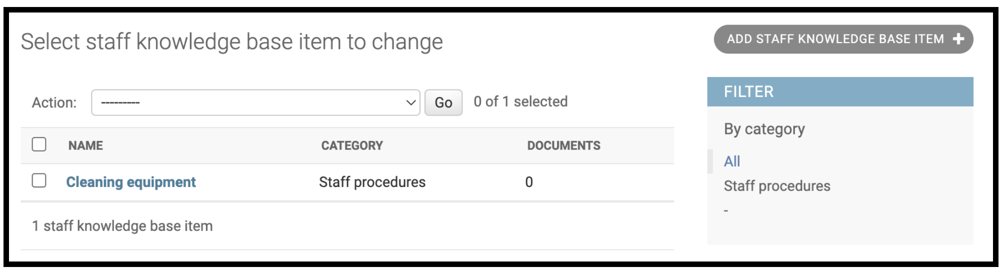


Figure 43.126: *Staff knowledge base items summary page*

43.55.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.127).

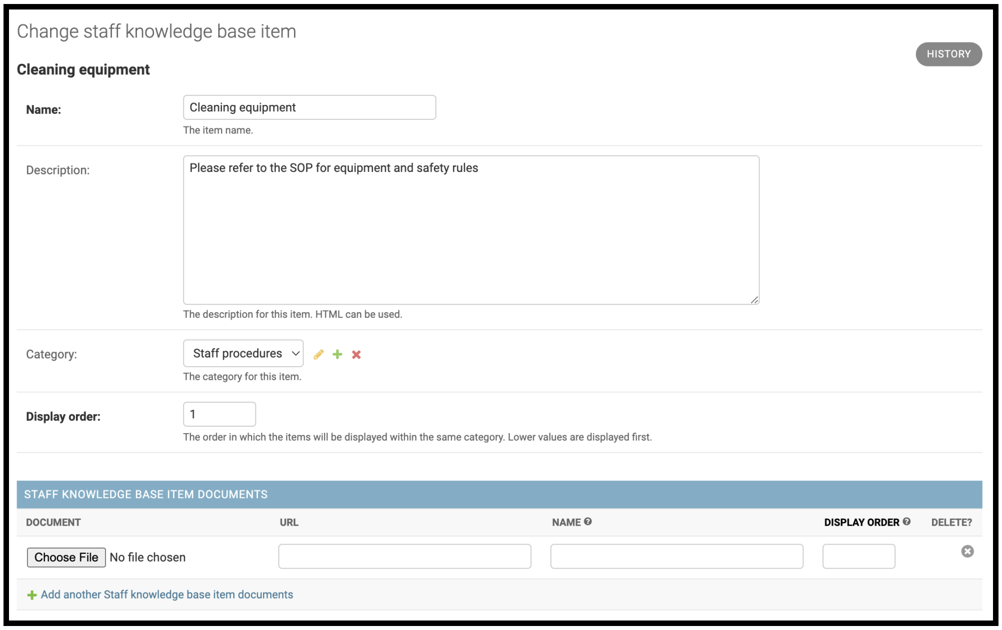


Figure 43.127: *Staff knowledge base items add/edit page*

- Name – the name of the staff knowledge base item. (required).
- Description – the description for this item. HTML syntax can be used.
- Category – the category to display this item in.
- Display order – the order in which to display this item within the category. The lowest value is displayed first.
- Item documents – the list of documents for this item. Documents can be links or files to be uploaded in NEMO. Optionally, a name can also be entered. If not provided, it will default to the file name.

43.55.4 User access page

Staff knowledge base items are discussed in the Knowledge base chapter 13.

43.56 Task categories

43.56.1 Usage

Task categories are optional but can be useful for binning tasks aiding in future analysis and trending. Task categories, if used, must be created in this table view and can be any text name. Any number can be defined. Also, they can be defined for use as initial problem categories or final problem categories. If no task categories are defined, they are not displayed on the tasks page. Task categories are discussed in the Report a problem tab of the Tool control page, see section 6.8.

43.56.2 Summary Page

The summary page provides a listing of task categories (Figure 43.128). Click the name field in the row of interest to edit.

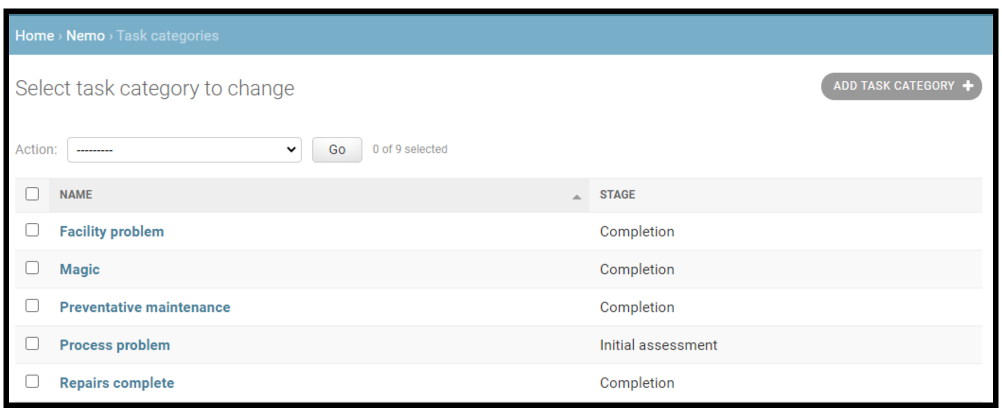


Figure 43.128: *Task categories summary page*

43.56.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.129).

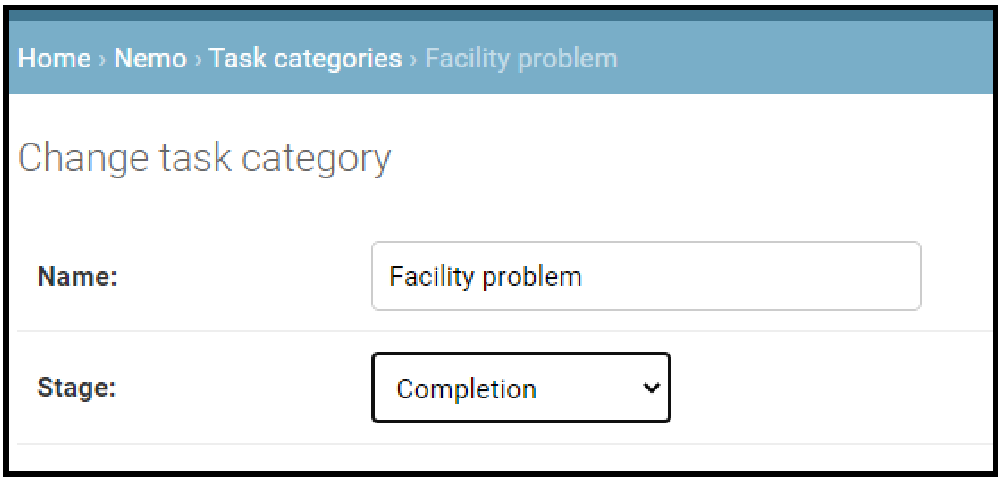


Figure 43.129: *Task categories add/edit page*

- Name – the name can be up to 200 characters (required).
- Stage – drop down list select either initial or completion (required).

43.56.4 User access page

There is no user access page to create task categories. However, task categories are discussed in the Report a problem tab of the Tool control page, see section 6.8.

43.57 Task statuses

43.57.1 Usage

Task statuses are optional but can be used to update various staff as a problem progresses to resolution. For example, once the maintenance team has finished a repair, they can change the status to qualification which notifies the process engineer that the tool is ready to requalify. Task statuses, if used, must be created in this table view and number can be defined. If no task statuses are defined, they are not displayed on the tasks page. Task statuses are discussed in the Report a problem tab of the Tool control page, see section 6.8.

43.57.2 Summary Page

The summary page provides a listing of task statuses (Figure 43.130). Click the name field in the row of interest to edit.

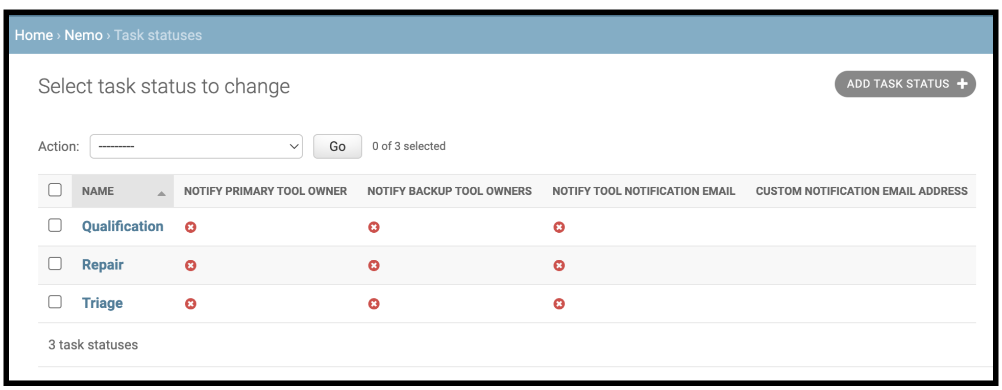


Figure 43.130: *Task statuses summary page*

43.57.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.131).

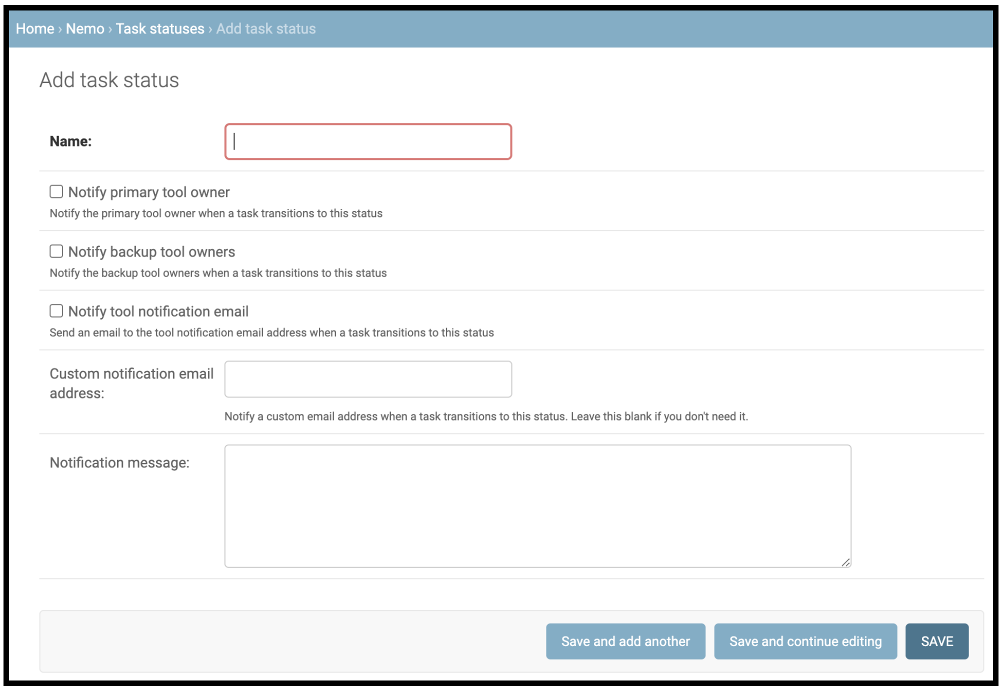


Figure 43.131: *Task statuses add/edit page*

- Name – the name can be up to 200 characters (required).

43.57.4 User access page

There is no user access page to create task statuses however, task statuses are discussed in the Report a problem tab of the Tool control page, see section 6.8.

43.58 Tasks

43.58.1 Usage

Tasks are used to track problems with tools statuses are optional but can be used to update various staff as a problem progresses to resolution. For example, once the maintenance team has finished a repair, they can change the status to qualification which notifies the process engineer that the tool is ready to requalify. Task statuses, if used, must be created in this table view and number can be defined. If no task statuses are defined, they are not displayed on the tasks page. Task statuses are discussed in the Report a problem tab of the Tool control page, see section 6.8.

43.58.2 Summary Page

The summary page provides a listing of tasks (Figure 43.132). Click the id field in the row of interest to edit.

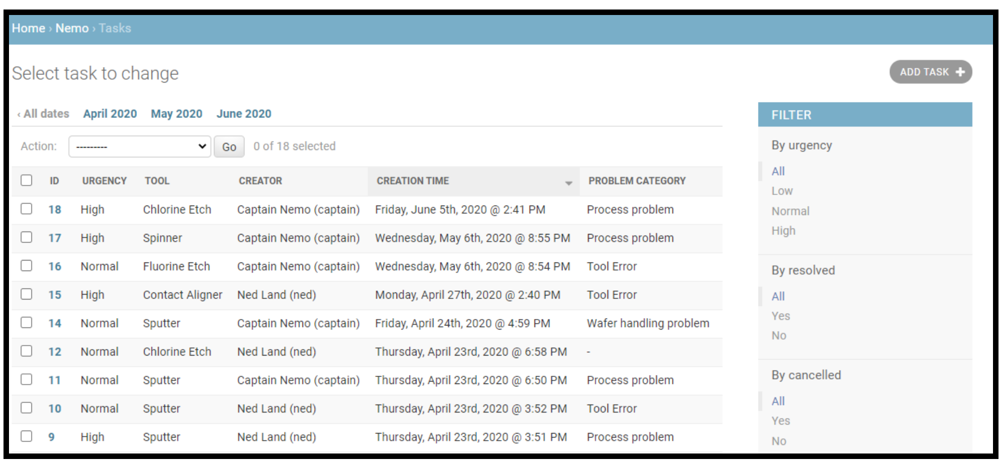


Figure 43.132: *Task statuses summary page*

43.58.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.133, Figure 43.134).

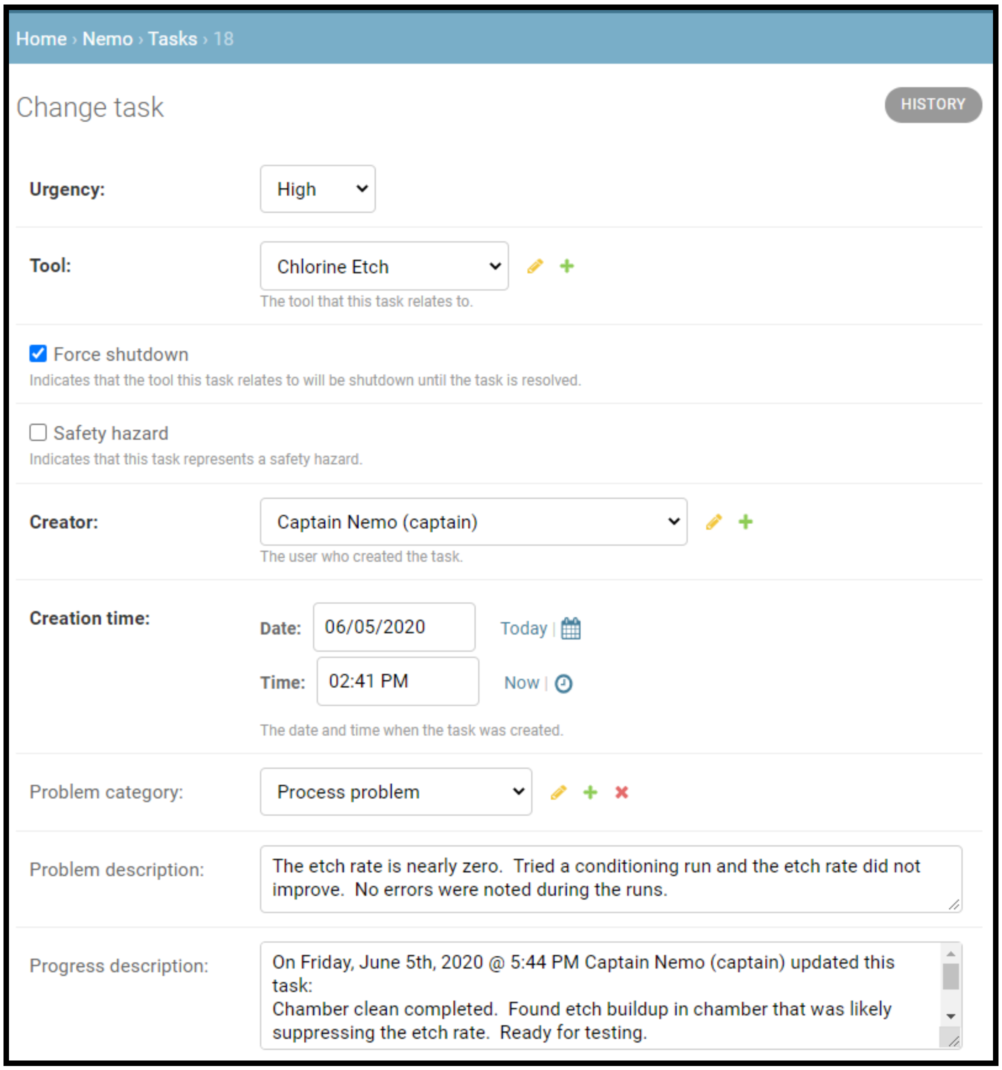


Figure 43.133: *Tasks add/edit page part 1*

- Urgency – drop down list select high, medium, or low (required).

- Tool – drop down list select tool that the task relates to (required). Tools table.
- Force shutdown – checkbox indicates that the tool this task relates to will be shut down until the task is resolved.
- Safety hazard – checkbox indicates that this task represents a safety hazard.
- Creator – drop down list select user that created the task. (required) Users table.
- Creation time – date/time the task was created. (required).
- Problem category – drop down list select category if used. Task categories table.
- Problem description – text description of initial problem.
- Progress description – text description of progress posted through updates.

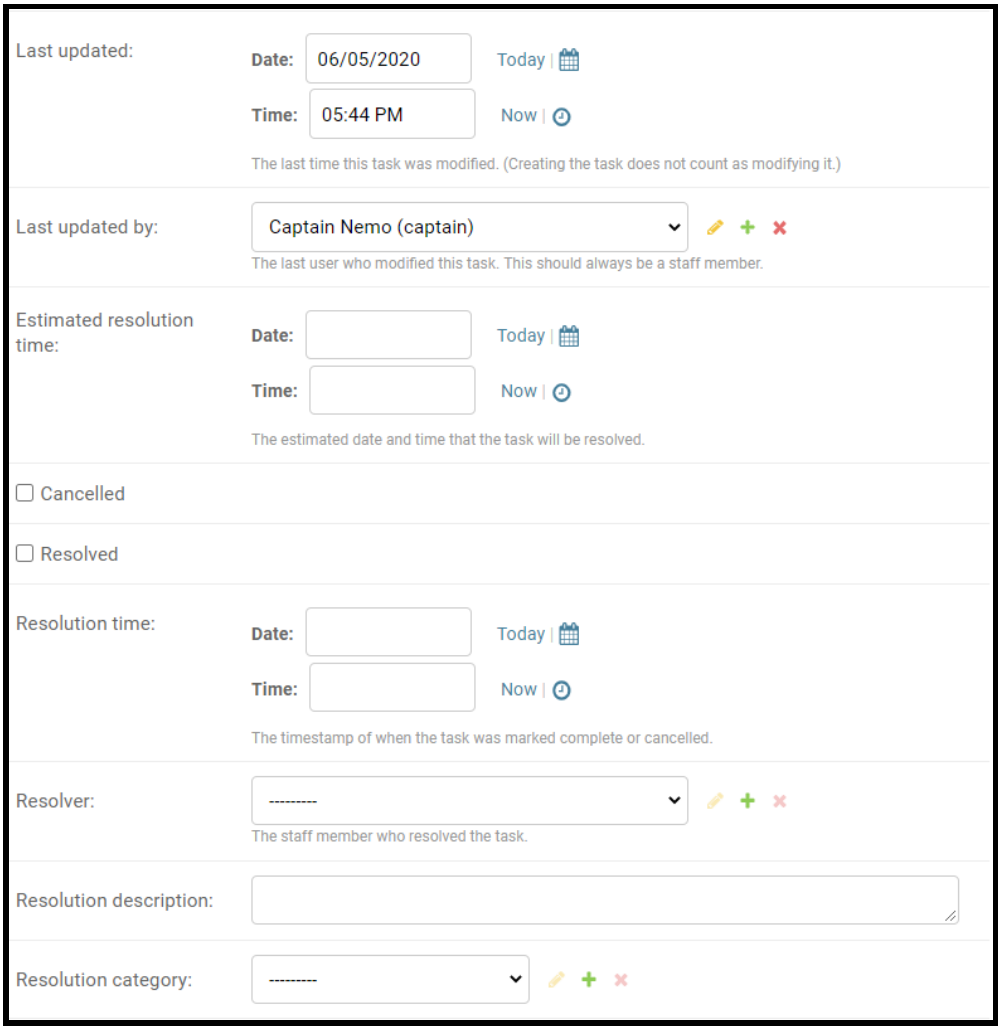


Figure 43.134: *Tasks add/edit page part 2*

- Last updated – date/time the task was last updated.
- Last updated by – drop down list select user that provided the last update. Users table.
- Estimated resolution – date/time the problem is expected to be fixed.
- Cancelled – checkbox indicates that this task was cancelled.

- Resolved – checkbox indicates that this task was resolved.
- Resolution time – date/time the task was resolved.
- Resolver – drop down list select user that marked the problem resolved. Users table.
- Resolution description – text description of steps taken to resolve the problem.
- Resolution category – drop down list select category if used. Task categories table.

43.58.4 User access page

Tasks are created and maintained in the Report a problem tab of the Tool control page, see section 6.8.

43.59 Temporary physical access requests

43.59.1 Usage

Temporary physical access requests are used so users can submit a request to obtain a physical access temporarily. For example, a user could request temporary access to the Cleanroom on a weekend when they don't otherwise have access. Access requests are discussed in the access requests page, see section 8.2.

43.59.2 Summary Page

The summary page provides a listing of temporary physical access requests (Figure 43.135). Click the creator field in the row of interest to edit.

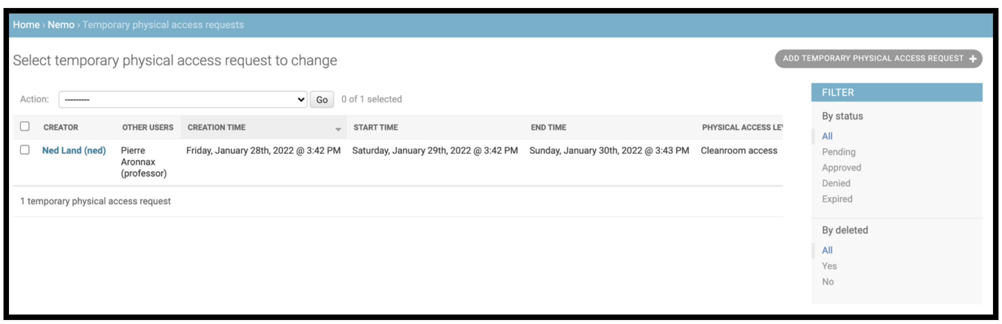


Figure 43.135: *Temporary physical access requests summary page*

43.59.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.136, Figure 43.137).

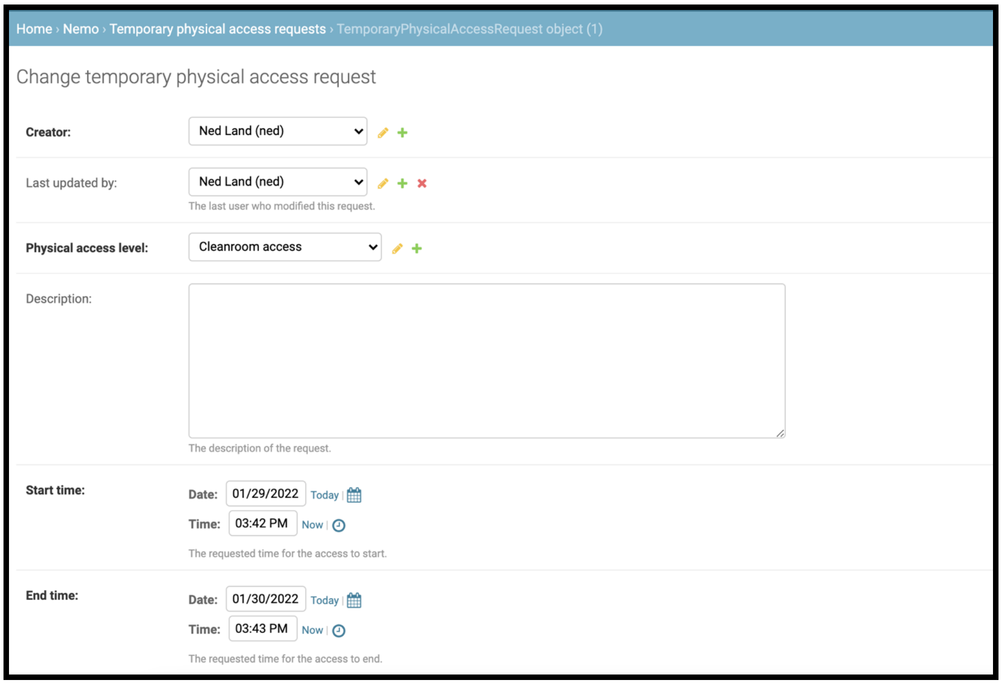


Figure 43.136: *Temporary physical access requests add/edit page part 1*

- Creator – drop down list select user who created the request (required).
- Last updated by – drop down list select the user who last updated the record.
- Physical access level – drop down list select the physical access level that the user is requesting (required).
- Description – text description of the request.
- Start time – date/time the requested access should start (required).

- End time – date/time the requested access should end (required).

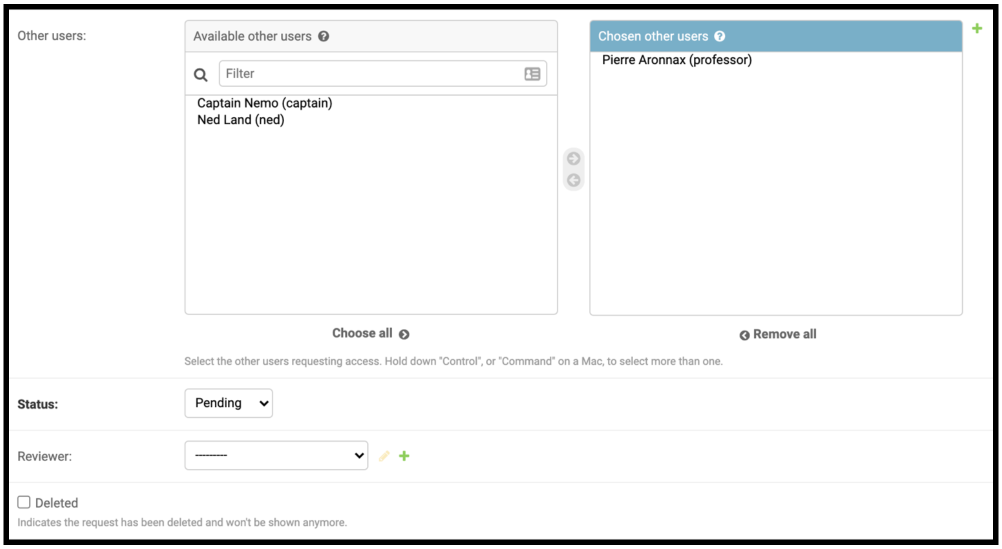


Figure 43.137: *Temporary physical access requests add/edit page part 2*

- Other users – select from available users and click the right arrow to add to chosen users. Multiple users can be selected at the same time using shift or control keys.
- Status – drop down list select the status of the request (required).
- Reviewer – drop down list select user who reviewed the request.
- Deleted – checkbox indicates that this request was deleted.

43.59.4 User access page

Access requests are created and maintained in the access requests page, see section 8.2.

43.60 Temporary physical access

43.60.1 Usage

Temporary physical access are used to temporarily give users access to an area.

43.60.2 Summary Page

The summary page provides a listing of temporary physical access (Figure 43.138). Click the id field in the row of interest to edit.

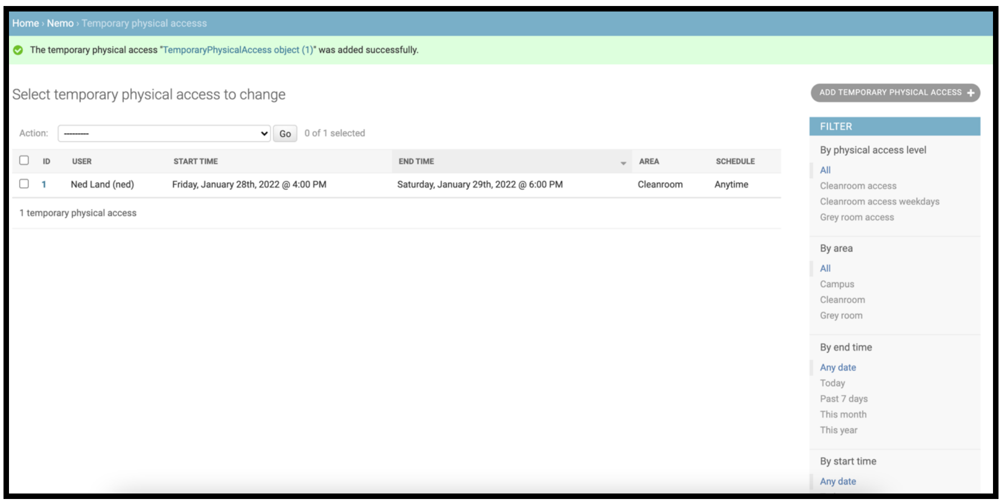


Figure 43.138: *Temporary physical access summary page*

43.60.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.139).

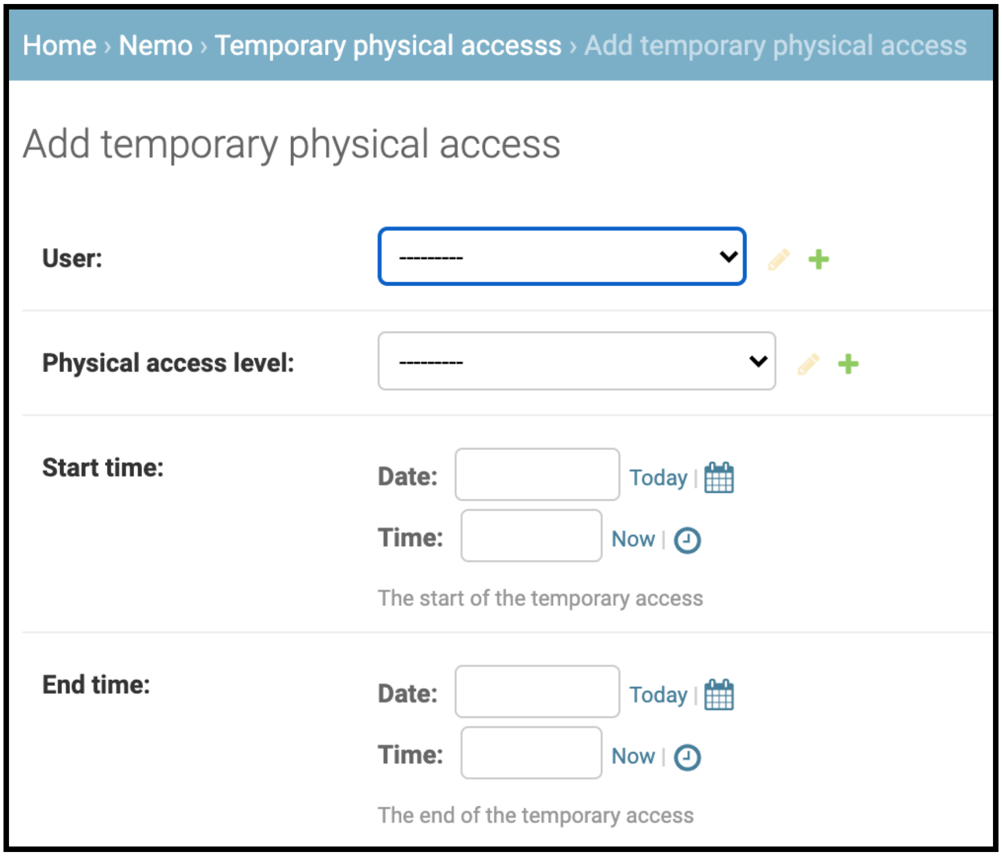


Figure 43.139: *Temporary physical access add/edit page*

- User – drop down list select user who will have the access (required).
- Physical access level – drop down list select the physical access level to give the user (required).
- Start time – date/time the start time of the temporary access (required).
- End time – date/time the end time of the temporary access (required).

43.60.4 User access page

There is no user access page for Temporary physical access. However, they are created behind the scenes from the data in Temporary physical access request discussed in the access requests page, see section 8.2.

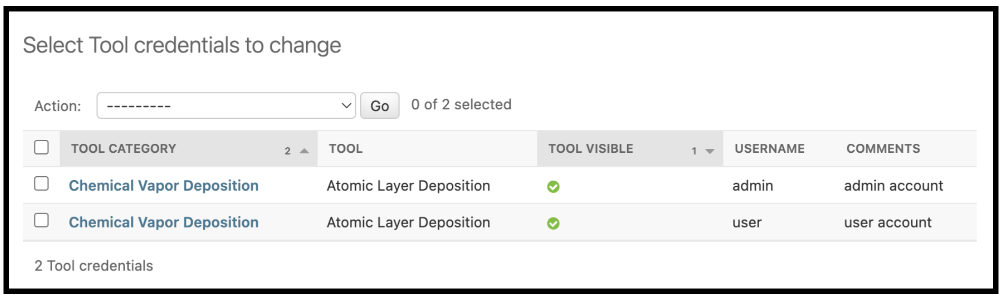
43.61 Tool credentials

43.61.1 Usage

Tool credentials are used to store username and passwords for specific tools.

43.61.2 Summary Page

The summary page provides a listing of tool credentials (Figure 43.140). Click the tool category field in the row of interest to edit.



Select Tool credentials to change

Action: --------- Go 0 of 2 selected

	TOOL CATEGORY	TOOL	TOOL VISIBLE	USERNAME	COMMENTS
	Chemical Vapor Deposition	Atomic Layer Deposition	✔	admin	admin account
	Chemical Vapor Deposition	Atomic Layer Deposition	✔	user	user account

2 Tool credentials

Figure 43.140: *Tool credentials summary page*

43.61.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.141).

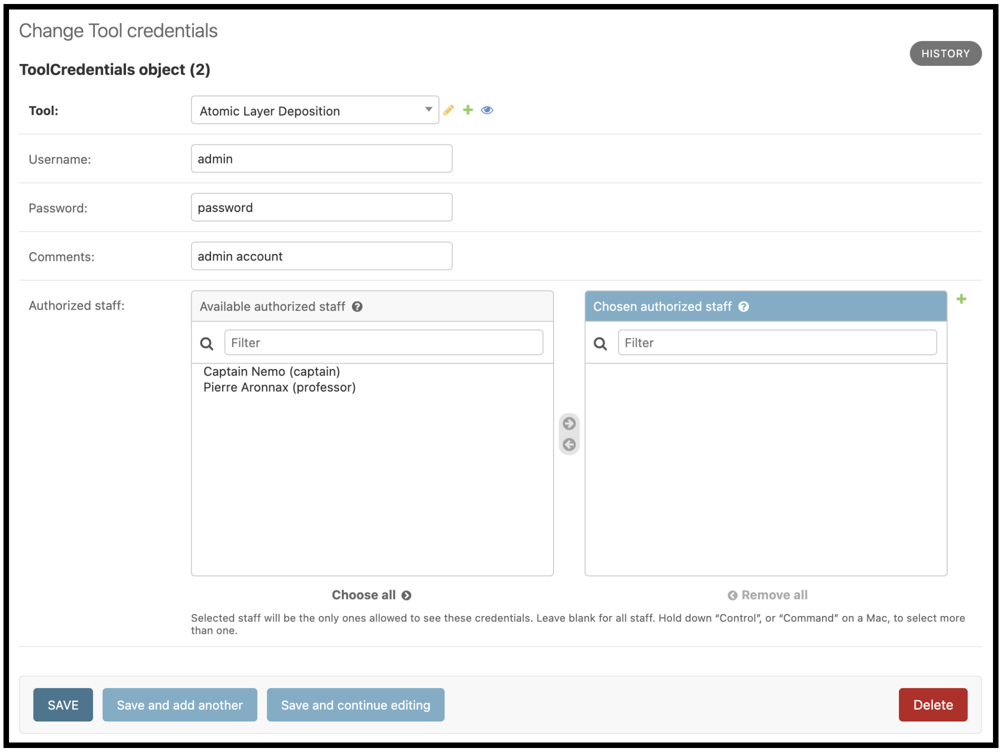


Figure 43.141: *Tool credentials add/edit page*

- Tool – select the tool this credential is for (required).
- Username – enter the username for this credential.
- Password – enter the password for this credential.
- Comments – enter any comments for this credential.
- Authorized staff – select the optional list of staff members who are allowed to see this credential. Leave blank for all staff.

43.61.4 User access page

Tool credentials can be found under Administration $\rightarrow$ Tool credentials and are discussed in chapter 36.

43.62 Tool qualification groups

43.62.1 Usage

Tool qualification groups are used when wanting to qualify users to a group of tools at once (via qualification page or training page).

43.62.2 Summary Page

The summary page provides a listing of tool qualification groups (Figure 43.142). Click the name field in the row of interest to edit.

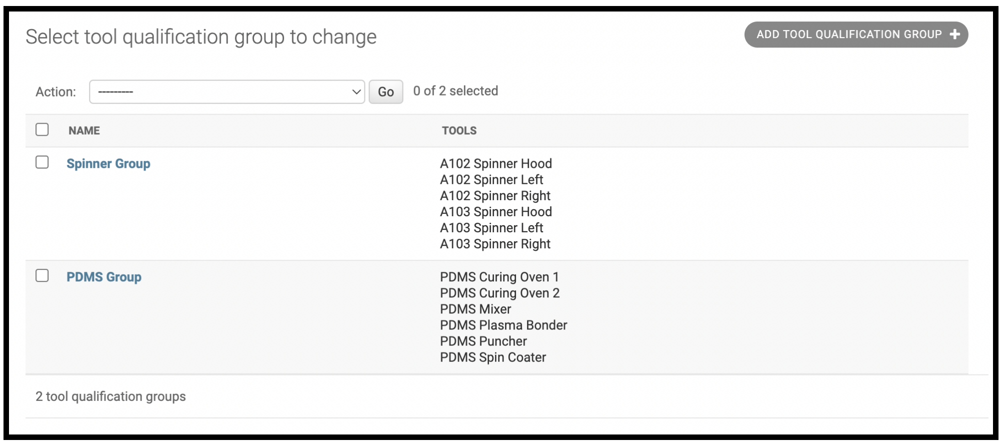


Figure 43.142: *Tool qualification group summary page*

43.62.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.143).

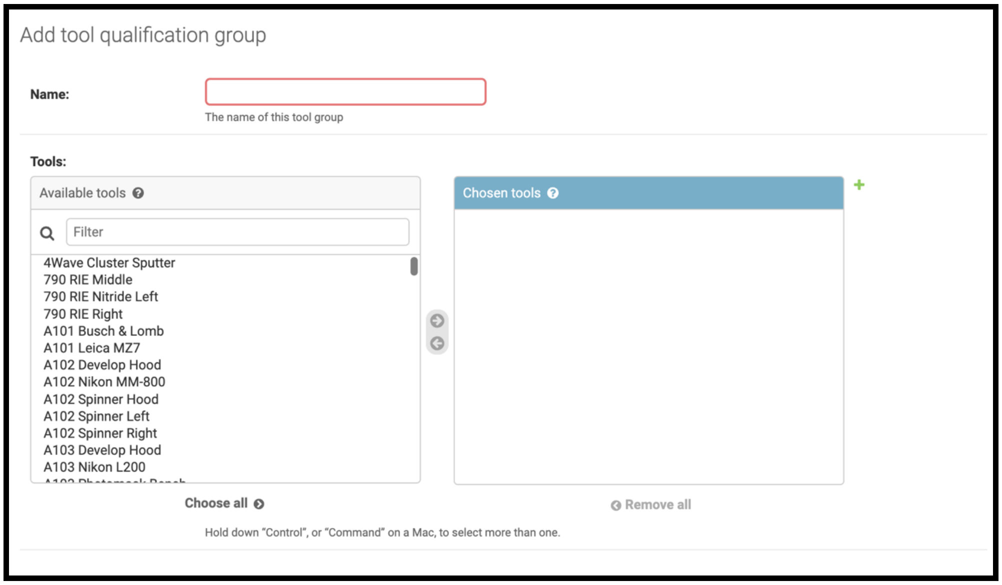


Figure 43.143: *Tool qualification group add/edit page*

- Name – the name for this group (required).
- Tools – list of tools to include in the group (required).

43.62.4 User access page

There is no user access page for Tool qualification groups. However, they are used in the Qualifications and Training feature.

43.63 Tool usage counters

Tool usage counters are linked to numeric or float pre/post usage questions and accumulate value with each tool logout based on the answer to the pre/post usage question. This feature is useful for displaying how much a tool has been used, to track material usage, or to trigger preventative maintenance. Tool usage counters are displayed on the tool control summary page.

43.63.1 Usage

The tool usage counters table lists each counter, the associated tool, the post usage question field, the current value, and last reset information. The tool usage counter must be created from this view.

- Tool usage counter setup
  - Prerequisites: the tool and a pre/post usage question for that tool must exist.
  - Create tools and pre/post usage questions for tools of interest in the Detailed administration → Tools table, see section 43.64.
    - For example, if we used the following post usage question on the “790 RIE Right” tool (Figure 43.144).
  - Add a tool usage counter in the Detailed administration → Tool usage counter table in this section and save.
    - For example, if we create a tool usage counter based on the post usage question above:
      - **Name**: “Etch Time”
      - **Description**: “This is for the etch time in minutes. PMs are performed every 100 minutes of use.”
        NOTE: line breaks will be displayed on the tool summary

page so limited formatting can be used to keep the page readable.

- **Tool**: 790 RIE Right
  NOTE: selected from dropdown box.
- **Tool usage question: “etch_time”**
  NOTE: “etch_time” is the name we gave the post usage question in the previous step. When saving, the post usage question name must be present, or an error will occur.

```
[
    {
        "type": "number",
        "title": "How long did you etch?",
        "max-width": 250,
        "suffix": "minutes",
        "required": true,
        "default_choice": null,
        "placeholder": 0,
        "name": "etch_time"
    }
]
```

Figure 43.144: *Tool usage counter example post usage question*

– When we log out of the 790 RIE Right tool, the following post usage question is displayed on the tool summary page before logout (Figure 43.145). The tool control summary page is fully described in chapter 6.

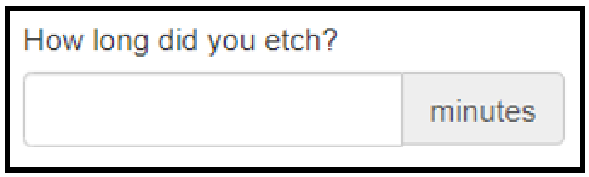


Figure 43.145: *Tool usage counter post usage input*

– The counter is updated and displayed (Figure 43.146) on the Tool control → Summary page.
If a warning threshold is set, the value will be green when it is let than the threshold, orange when it is equal to the threshold and red when the value is greater than the threshold.

  * NOTE: the reset button is only visible to staff.

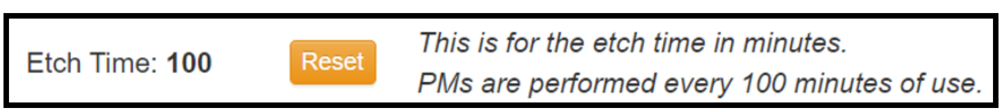


Figure 43.146: *Tool usage counter display*

43.63.2 Summary Page

The summary page provides a listing of tool usage counters (Figure 43.147). Click the name field in the row of interest to edit.

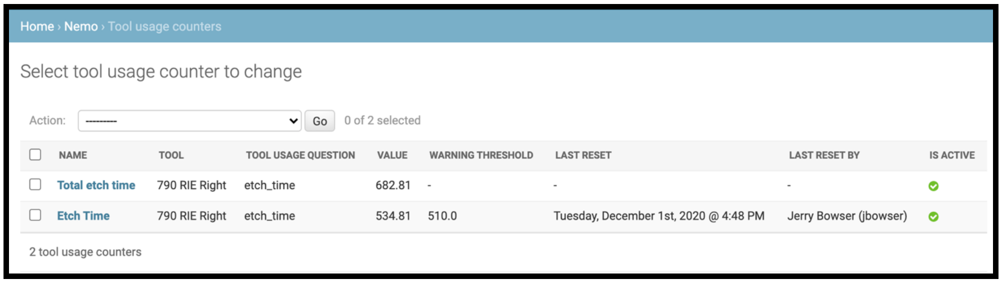


Figure 43.147: *Tool usage counters summary page*

43.63.3 Fields

The add/change page for this table lists the fields that can be edited (Figures 43.148 and 43.149).

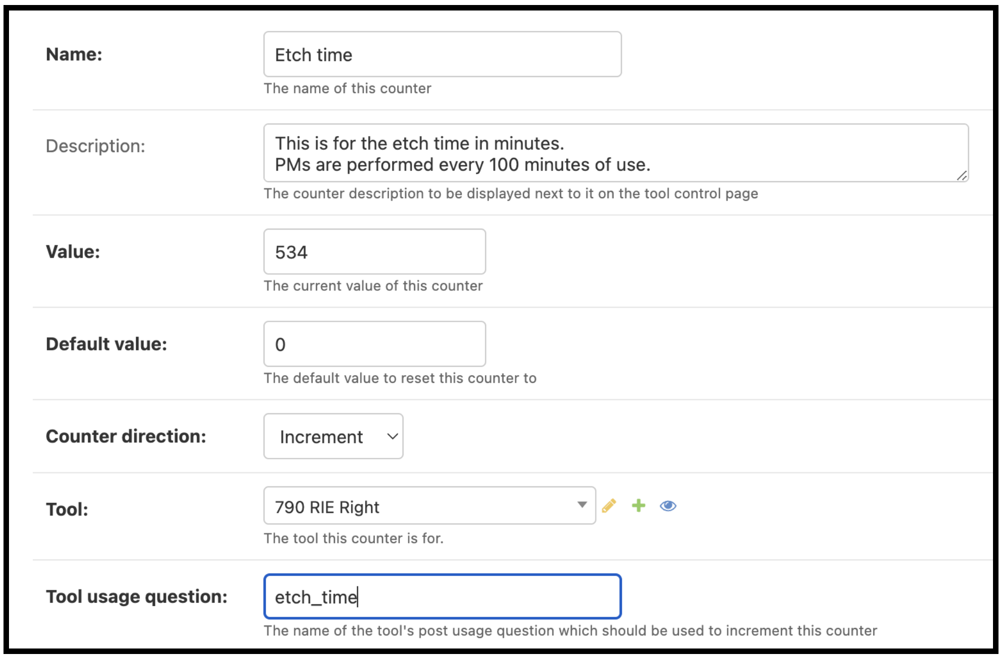


Figure 43.148: *Tool usage counters add/edit page*

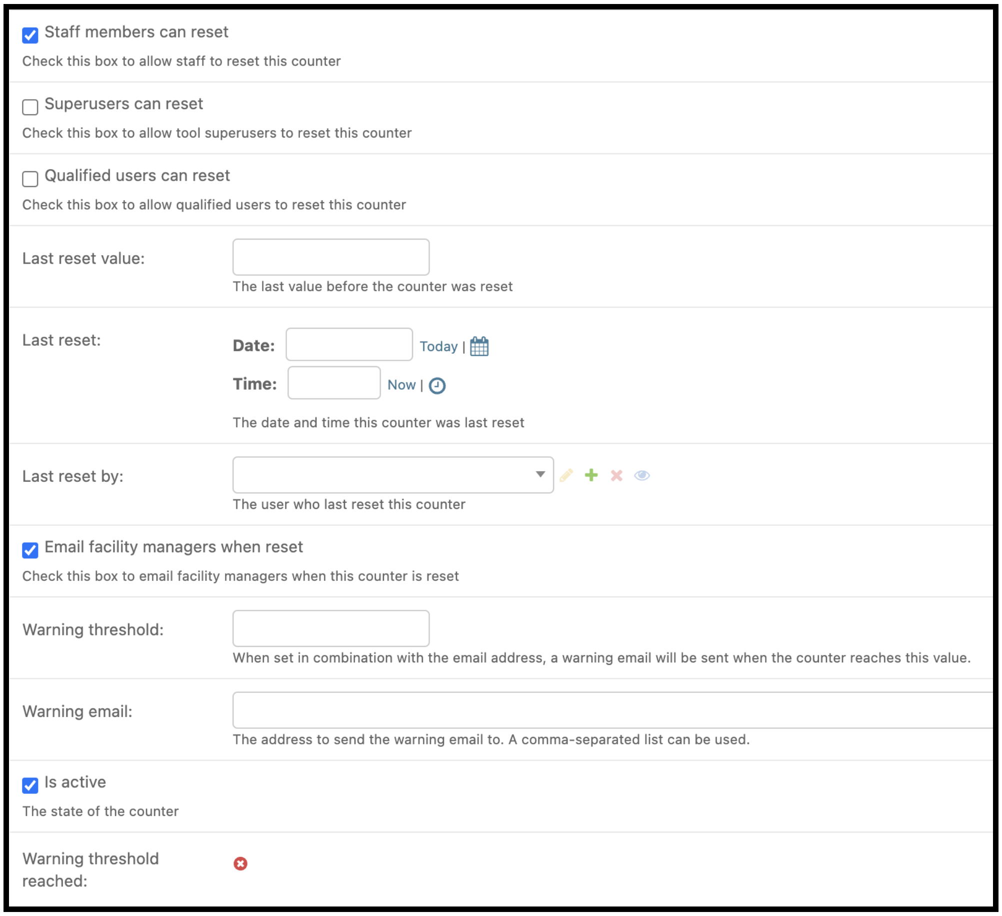


Figure 43.149: *Tool usage counters add/edit page (continued)*

- **Name** – the name of the counter. This name will be displayed on the tool summary page.
- **Description** – the counter description to be displayed next to the counter on the tool summary page.
- **Value** – the current value of the counter.
- **Default value** – when someone resets the counter, the value will be set to this value.

- **Counter direction** – whether to increment or decrement the counter when a new value is submitted.
- **Tool** – the tool the counter is for. Tools table.
- **Tool usage question** – the name of the pre/post usage question used to increment the counter.
- Staff members can reset – whether staff members can reset the counter.
- Superusers can reset – whether tool superusers can reset the counter.
- Qualified users can reset – whether qualified users can reset the counter.
- Last reset value – the last value before the counter was last reset. When a counter is reset, a comment is also written for the associated tool that captures the last reset value, date, and who reset.
- Last reset – the date/time the counter was last reset.
- Last reset by – the user who last reset the counter.
- Email facility managers on reset – whether to email facility managers when the counter is reset.
- Warning threshold – the value which once reached will trigger an email to be sent to the warning email.
- Warning email – email address to send the tool usage counter threshold reached email to. For this feature to work, the counter_threshold_reached_email needs to be set in Customization → Counter threshold reached email, see subsection 41.5.10.
- Is active – checked indicates the counter is active and will be displayed on the tool summary page. Unchecked hides the counter.

43.64 Tools

43.64.1 Usage

The tools table lists each tool, its status, qualified users, usage rules, interlock information, reservation rules, and dependencies. While the attributes can be modified on various pages of NEMO, the tool must first be created from this view.

43.64.2 Summary Page

The summary page provides a listing of tools (Figure 43.150). Click the name field in the row of interest to edit.

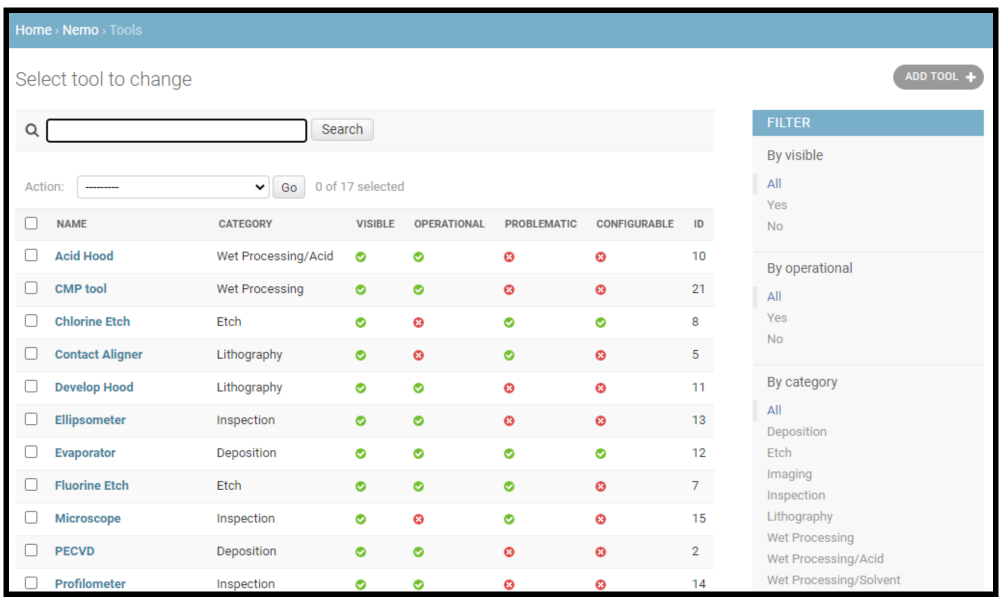


Figure 43.150: *Tools summary page*

43.64.3 Fields

The add/change page for this table lists the fields that can be edited.

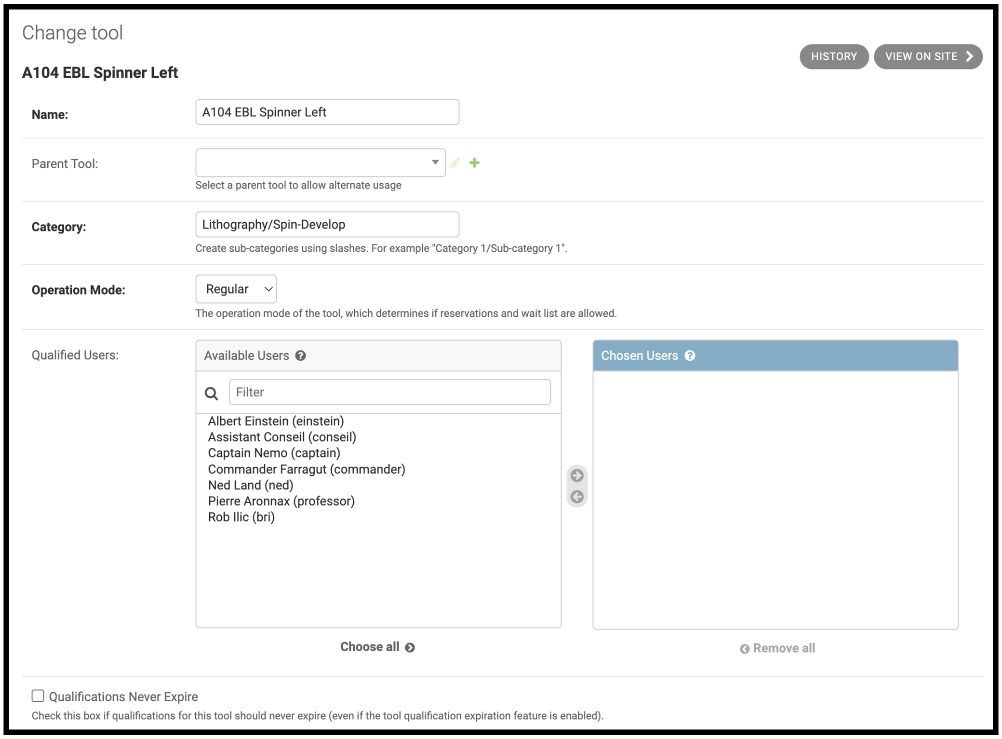


Figure 43.151: *Tools general information*

General Information (Figure 43.151):

- Name – text field of what the tool will be called throughout NEMO. (required).
- Parent tool – Select the parent tool from the dropdown list. If parent/child tools will be used, the child tools must identify which tool is the parent tool. If a parent tool is selected, the child tool will use all of the attributes of the parent tool except for the name. The parent/child tool relationship is useful when a single tool is used for multiple purposes that may be

billed at different rates. For example, a dual beam focused ion beam tool may have one rate to use in SEM mode and another rate when used in FIB mode. Tools table.

- Category – tools can be grouped together by location, type, or other grouping. These categories will be used to group tool in the calendar and tool control sidebars. Create sub-categories using slashes. For example, “Category 1/Sub-category 1”. (required).
- Operation mode – select this tool’s mode of operation: Regular, Waitlist or Hybrid (required). The different modes of operation are explained in the Tool control → Tool operation modes section 6.4.8.1
- Qualified users – select from available users and click the right arrow to add to chosen users. Multiple users can be selected at the same time using shift or control keys. Qualified users are managed on the users page, training page, or qualifications page. Users table.
- Qualifications Never Expire – check this box to prevent qualifications for this tool from expiring.
- Pre/Post usage questions – json formatted list can ask users for input at the beginning or end of their processes. Dynimic form options are discussed in section 50

Additional Information (Figure 43.152):

- Description – html description that will be displayed near the bottom of the tool summary page.
- Serial – alphanumeric field that will display at the top right of the tool summary page.
- Image – 500 pixel × 500 pixel maximum image that will display on the tool summary page next to the description.
- Tool calendar color – color used to display the tool in the calendar.

Figure 43.152: *Tools additional information*

Current state (Figure 43.153):

- Visible – checkbox to indicate whether the tool is visible to users. If not checked, the tool will not be displayed on the calendar or tool control sidebars.
- Operational – checkbox to indicate whether the tool is available to users. The operational status is managed by the report a problem tab on the tool control page.

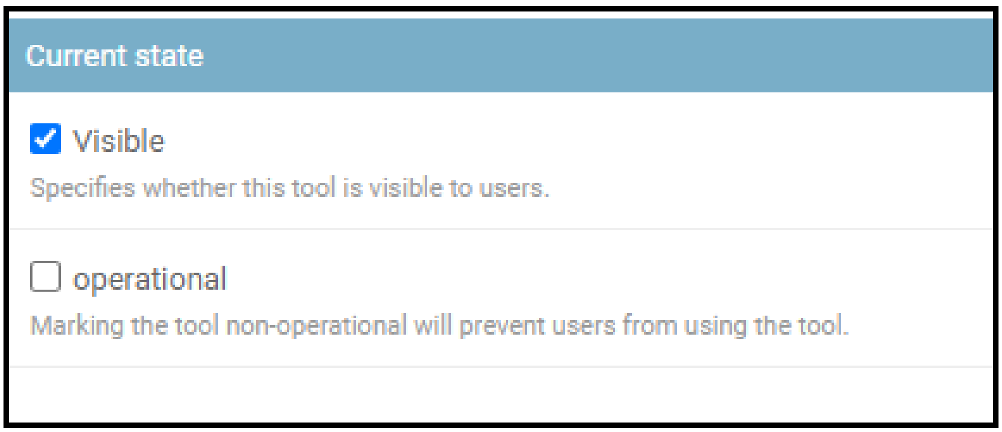


Figure 43.153: *Tools current state*

Contact Information (Figure 43.154):

- Primary owner – select from the drop down list the staff member who is responsible for the administration of the tool. The primary owner is listed on the details tab of the tool control page. (required).
- Backup owners - select from available users and click the right arrow to add to chosen users. Multiple users can be selected at the same time using shift or control keys. The backup owners are listed on the details tab of the tool control page.
- Superusers – select from available users and click the right arrow to add to chosen superusers. Multiple users can be selected at the same time using shift or control keys. The superusers are listed on the details tab of the tool control page and have the ability to train users on tools they are listed as superusers for.
- Notification email address – in addition to the primary and backup tool owners, comments, problems, and shutdown notices will be forwarded to this email address.
- Location – a text descriptor to identify the tools location. The location is displayed on the details tab of the tool control page. In addition, the kiosk uses the location to group nearby tools. Since this is a free form text input, make sure locations across tools are consistently listed. (required if set in Customization - Tool settings).
- Phone number – a text listing of the phone number. No phone number formatting is performed so extensions can be used as well as full phone numbers. The phone number is displayed on the details tab of the tool control page. (required if set in Customization - Tool settings).

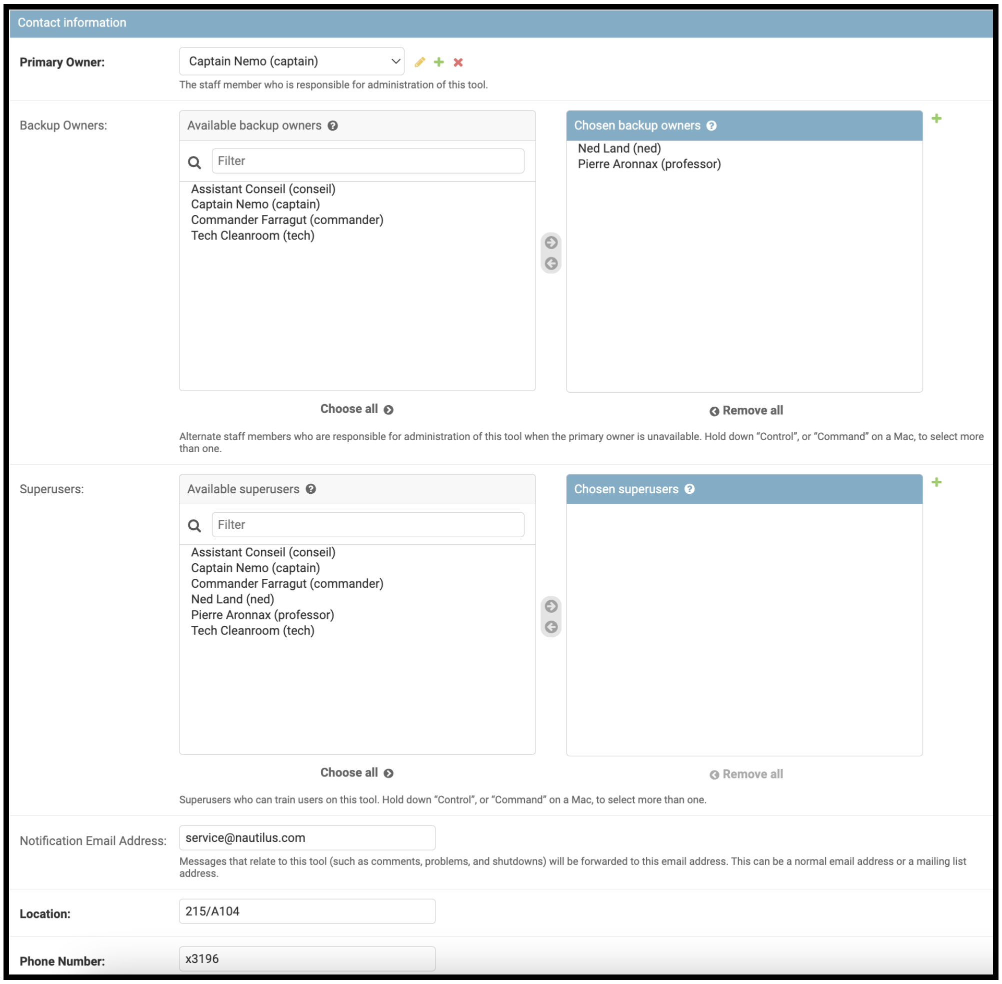


Figure 43.154: *Tools contact information*

Approval (Figure 43.155):

- Adjustment request reviewers – Select the list of users who can approve/-deny adjustment requests for this tool. If left blank, all users with the facility manager role can review adjustment requests for this tool.

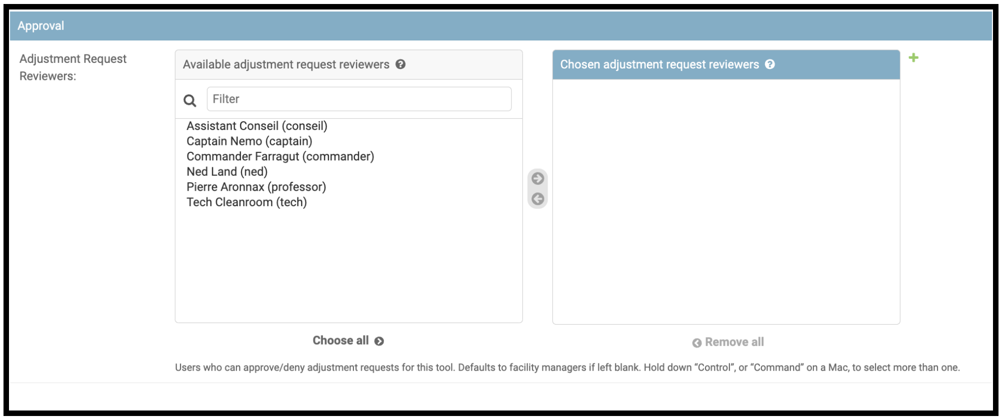


Figure 43.155: *Tools adjustment requests approval*

Reservation (Figure 43.156):

- Reservation horizon – Users may create reservations this many days in advance. Leave this field blank to indicate that no reservation horizon exists for this area.
- Missed reservation threshold – The amount of time (in minutes) that an area reservation may go unused before it is automatically marked as “missed” and hidden from the calendar. The cancellation process is triggered by a timed job on the web server.

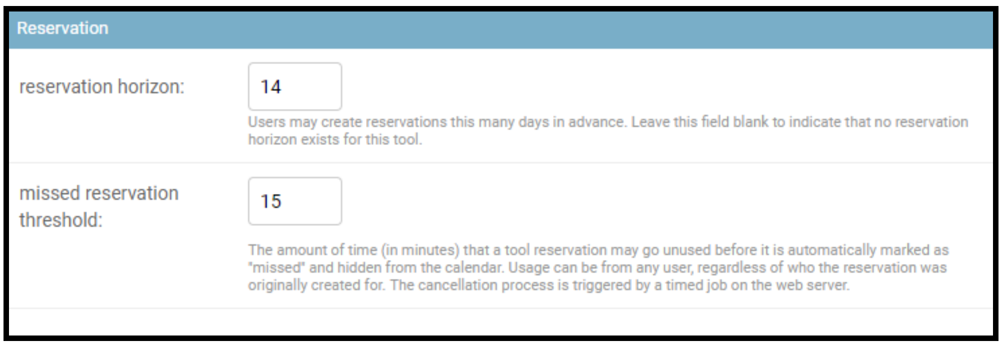


Figure 43.156: *Tools reservation*

Usage policy (Figure 43.157)

- Policy off between times – Check this box to disable policy rules every day between the given times.
- Policy off start time – The start time when policy rules should NOT be enforced.
- Policy off end time – The end time when policy rules should NOT be enforced.
- Policy off weekend – Whether or not policy rules should be enforced on weekends.
- Minimum usage block time – The minimum amount of time (in minutes) that a user must reserve this tool for a single reservation. Leave this field blank to indicate that no minimum usage block time exists for this tool.
- Maximum usage block time – The maximum amount of time (in minutes) that a user may reserve this tool for a single reservation. Leave this field blank to indicate that no maximum usage block time exists for this tool.
- Maximum reservations per day – The maximum number of reservations a user may make per day for this tool.
- Maximum Future Reservations – The maximum number of reservations a user may have from the current time onwards.
- Minimum time between reservations – The minimum amount of time (in minutes) that the same user must have between any two reservations for this tool.
- Maximum future reservation time – The maximum amount of time (in minutes) that a user may reserve from the current time onwards.

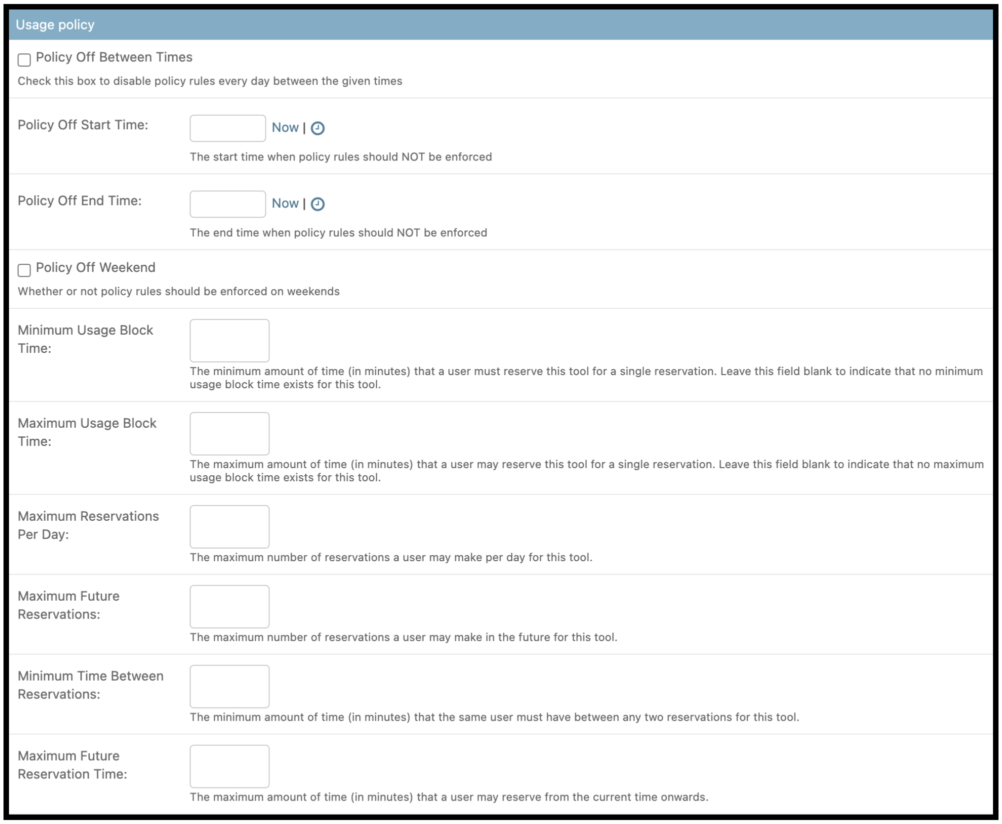


Figure 43.157: *Tools usage policy*

Area access (Figure 43.158)

- Requires area access – drop down list select area. Indicates that this tool is physically located in a billable area and requires an active area access record in order to be operated. Areas table.
- Grant physical access level upon qualification – drop down list select physical access level. The designated physical access level is granted to the user upon qualification for this tool. Physical access levels table.
- Grant badge reader access upon qualification – text that corresponds to a door name setup through the external identity service. Badge reader access is granted to the user upon qualification for this tool.
- Interlock – drop down list select interlock channel to associate with this tool. Interlocks table.
- Max delayed logoff - Upon logging off users may enter a delay before another user may use the tool. Some tools require “spin-down” or cleaning time after use. Leave blank to disable delayed logoff.
- Ask to leave area when done using - Check this box to ask the user if they also want to log out of an area when they disengage this tool.

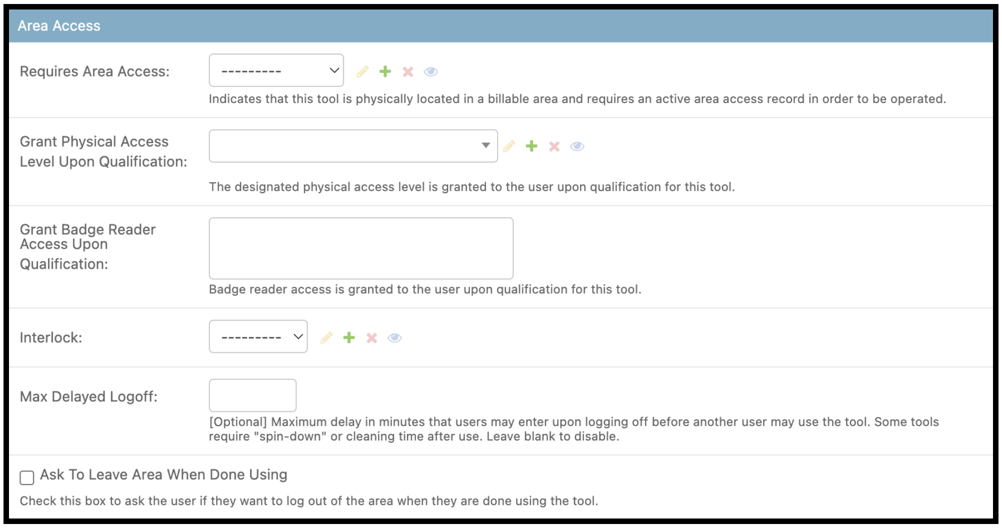


Figure 43.158: *Tools area access*

Dependencies (Figure 43.159)

- Required resources – select from available resources and click the right arrow to add to chosen required resources. Multiple resources can be selected at the same time using shift or control keys. If a required resource is shutdown, this tool will not be available to users. Resource status is displayed on the tool control page. Resources are managed through the resources page. Resources table.
- Nonrequired resources – select from available resources and click the right arrow to add to chosen nonrequired resources. Multiple resources can be selected at the same time using shift or control keys. If a nonrequired resource is shutdown, this tool will be available to users but will notify them of a potential problem. Resource status is displayed on the tool control page. Resources are managed through the resources page. Resources table.

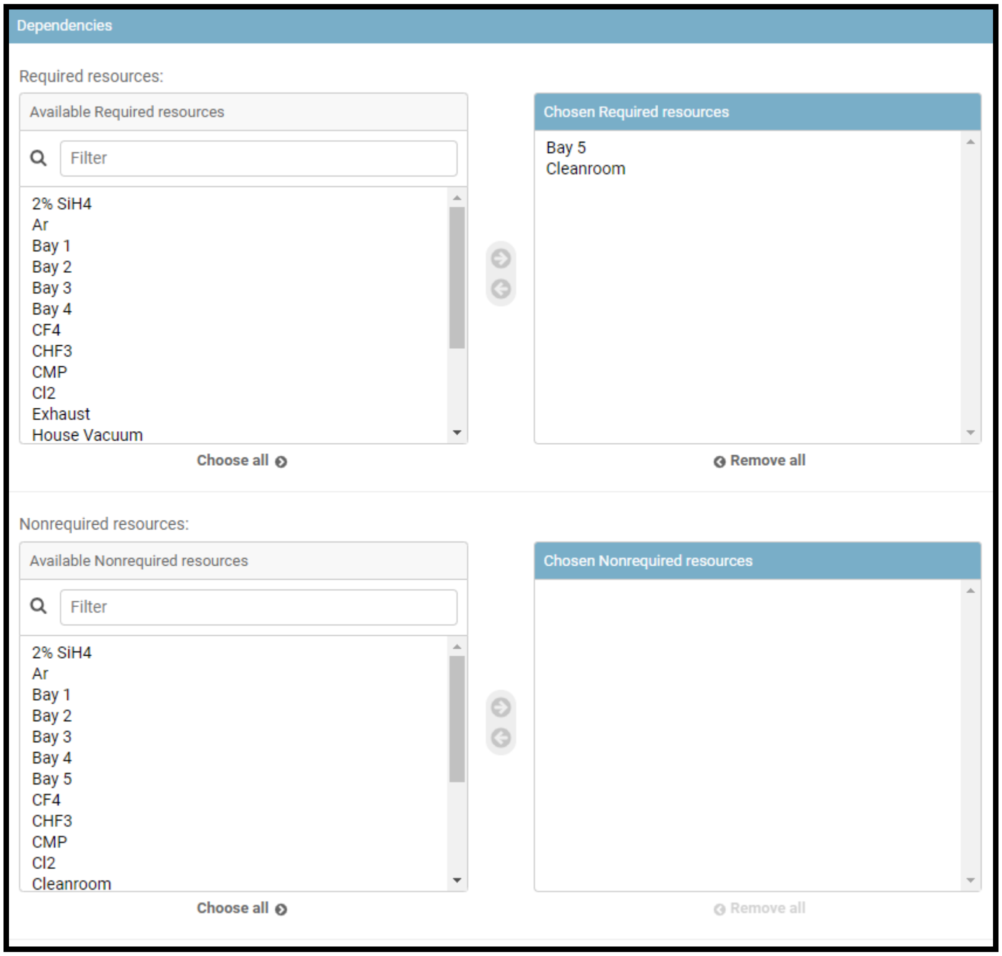


Figure 43.159: *Tools dependencies*

Tool Documents (Figure 43.160)

- Tool documents can be uploaded and will be displayed on the tool control page near the bottom of the tool summary page.
- You can either click "Choose File" to upload a file or enter a URL to a file.
- Optionally a name can be set for the document. If not provided, the document filename will be used.
- To delete a file, either replace it or click the "DELETE?" checkbox for that file, then save.
- Tool documents are sorted in reverse order of date uploaded.

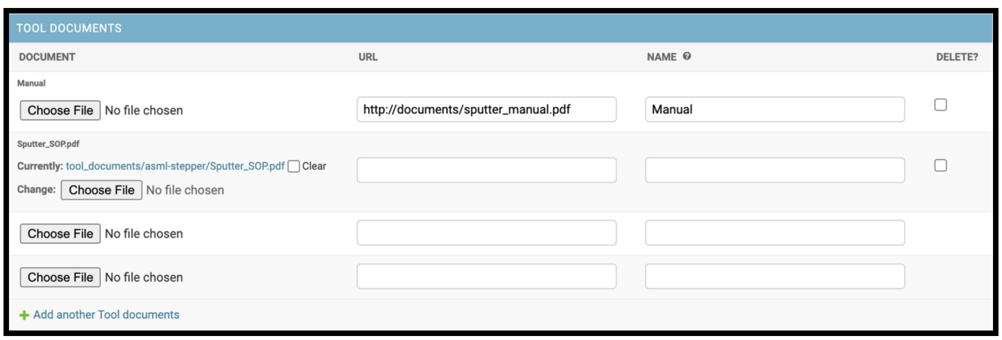


Figure 43.160: *Tools documents*

43.64.4 User access page

There is no user access page to create tools. However, once created, several parameters can be updated in NEMO pages.

- Qualified users are managed on the users page, the training page, or the qualifications page.
- Most tool attributes are displayed on the tool control pages.

- Reservation and usage policy are discussed in the reservations section.
- Dependency status is updated on the resources page.

43.65 Training sessions

43.65.1 Usage

The training sessions table records the time and type of training provided. It is updated directly from the training page and under normal situations this table should not need to be directly modified. If a facility charges for training, this table contains the training to be billed and duration.

43.65.2 Summary Page

The summary page provides a listing of training sessions (Figure 43.161). Click the id field in the row of interest to edit.

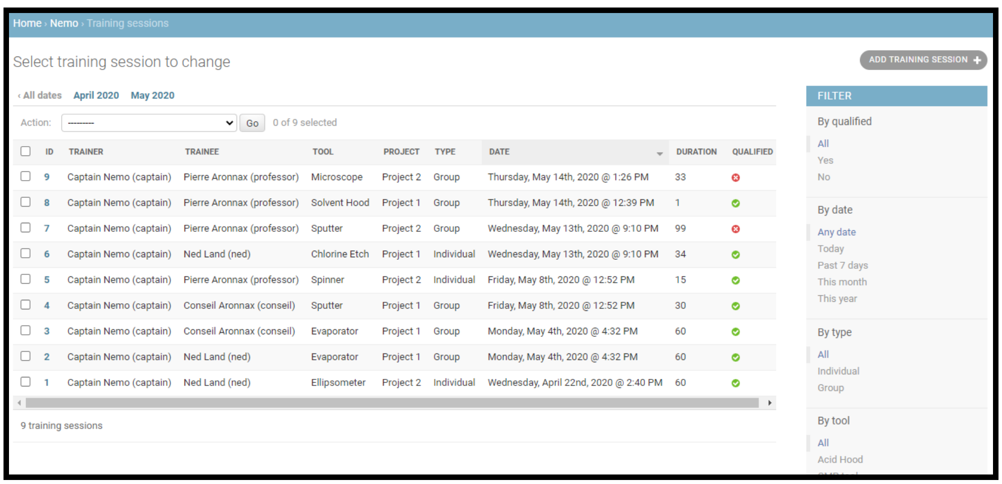


Figure 43.161: *Training sessions summary page*

43.65.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.162).

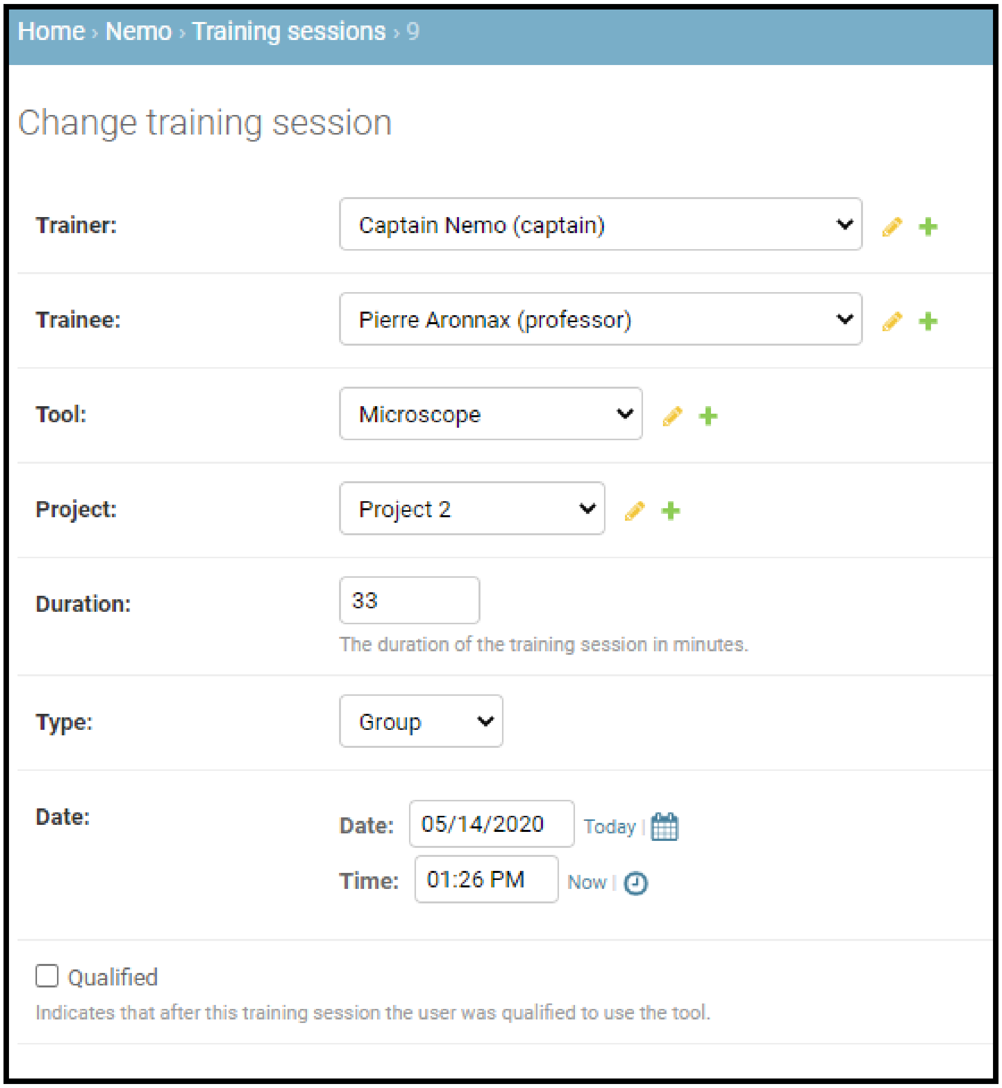


Figure 43.162: *Training sessions add/edit page*

- Trainer – drop down list select the staff user that performed the training.

(required) Users table.

- Trainee – drop down list select the user that received training. (required) Users table.
- Tool – drop down list select the tool that training was performed on. (required) Tools table.
- Project – drop down list select the project to charge training to. (required) Projects table.
- Duration – the training duration in whole minutes. (required).
- Type – drop down list select group or individual. (required).
- Date – data/time the training activity was recorded. (required).
- Qualified – checkbox indicates if the user was qualified to use the tool after the training session.

43.65.4 User access page

Training sessions are maintained on the training page.

43.66 Usage events

43.66.1 Usage

The usage events table records all tool usage based on log in and log out events on the tool control page. Under normal situations this table should not need to be directly modified. If a facility charges for tool usage, this table contains the usage events to be billed and duration.

43.66.2 Summary Page

The summary page provides a listing of usage events (Figure 43.163). Click the id field in the row of interest to edit.

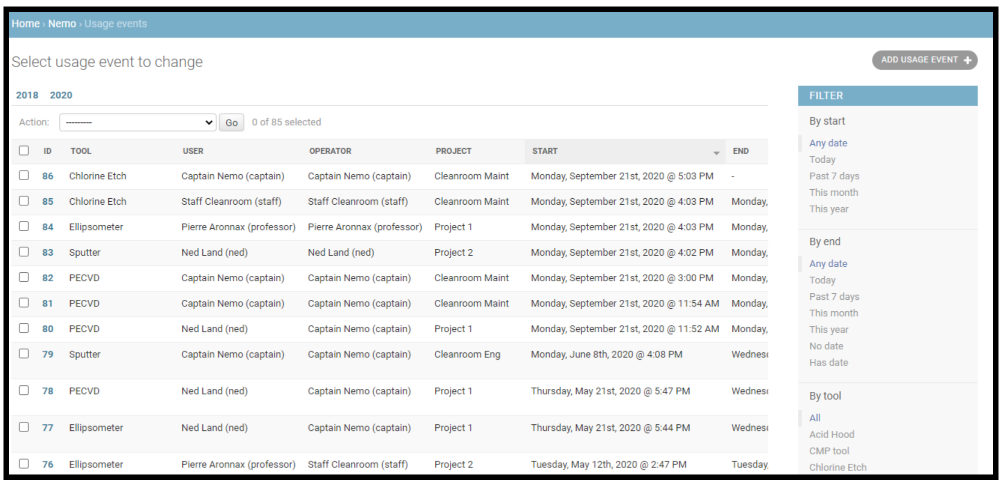


Figure 43.163: *Usage events summary page*

43.66.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.164).

Figure 43.164: *Usage events add/edit page*

- User – drop down list select the user using the tool. This is the person being billed. (required) Users table.
- Operator – drop down list select the user using the tool. This is the person using the tool so it could be the user or a staff member on behalf of the user. (required) Users table.
- Project – drop down list select the project to charge usage to. (required) Projects table.
- Tool – drop down list select the tool in use. (required) Tools table.
- Start – data/time the usage event started. (required).
- End – data/time the usage event ended. Active usage has a blank end date/time.
- Validated – checkbox indicates if the staff member confirmed the usage was correct. Only applies to tool run on behalf of another user.
- Validated by – drop down list select the user who validated this charge.
- Remote work – checkbox indicates whether this usage was for remote work.
- Pre run data – contains the answers to any pre usage questions in json format.
- Run data – contains the answers to any post usage questions in json format.

43.66.4 User access page

Training sessions are maintained on the training page.

43.67 User knowledge base categories

43.67.1 Usage

User knowledge base categories are used to organize knowledge base items. Knowledge base items are discussed in the Knowledge base chapter 13.

43.67.2 Summary Page

The summary page provides a listing of user knowledge base categories (Figure 43.165). Click the name field in the row of interest to edit.

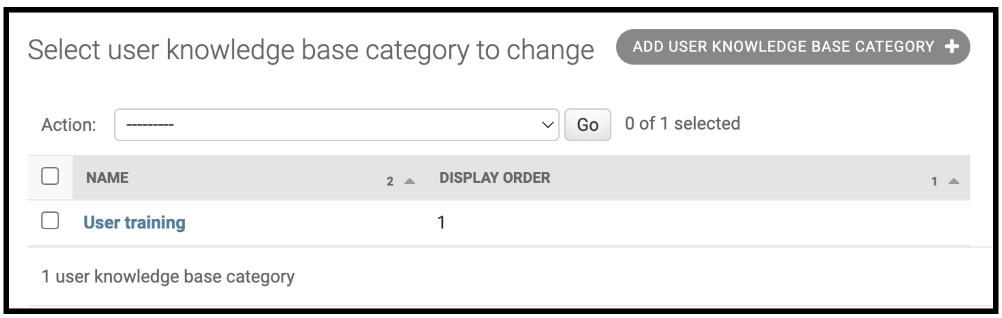


Figure 43.165: *User knowledge base categories summary page*

43.67.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.166).

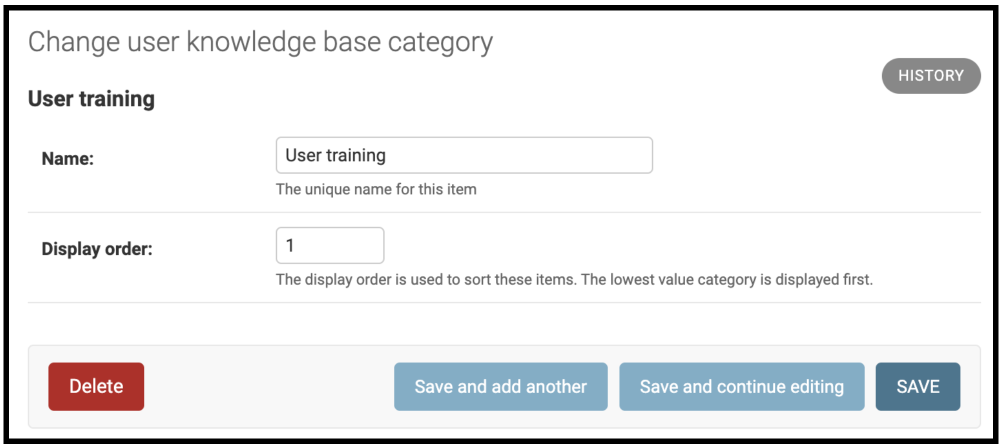


Figure 43.166: *User knowledge base categories add/edit page*

- Name – the name of the knowledge base category. (required).
- Display order – the order in which to display the category. The lowest value is displayed first.

43.67.4 User access page

User knowledge base categories are discussed in the Knowledge base chapter 13.

43.68 User knowledge base items

43.68.1 Usage

User knowledge base items are used to provide information to users, organized in categories. Knowledge base items are discussed in the Knowledge base chapter 13.

43.68.2 Summary Page

The summary page provides a listing of user knowledge base items (Figure 43.167). Click the name field in the row of interest to edit.

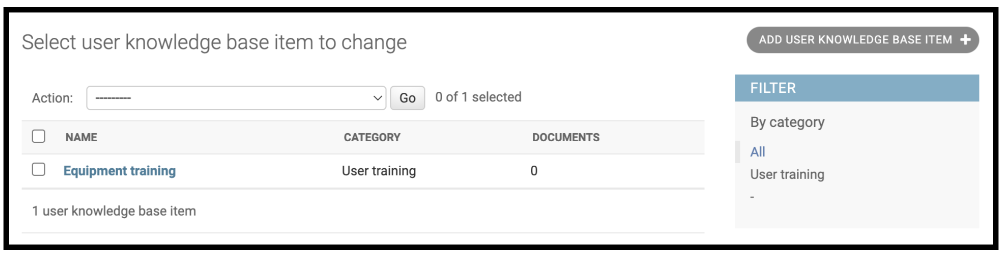


Figure 43.167: *User knowledge base items summary page*

43.68.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.168).

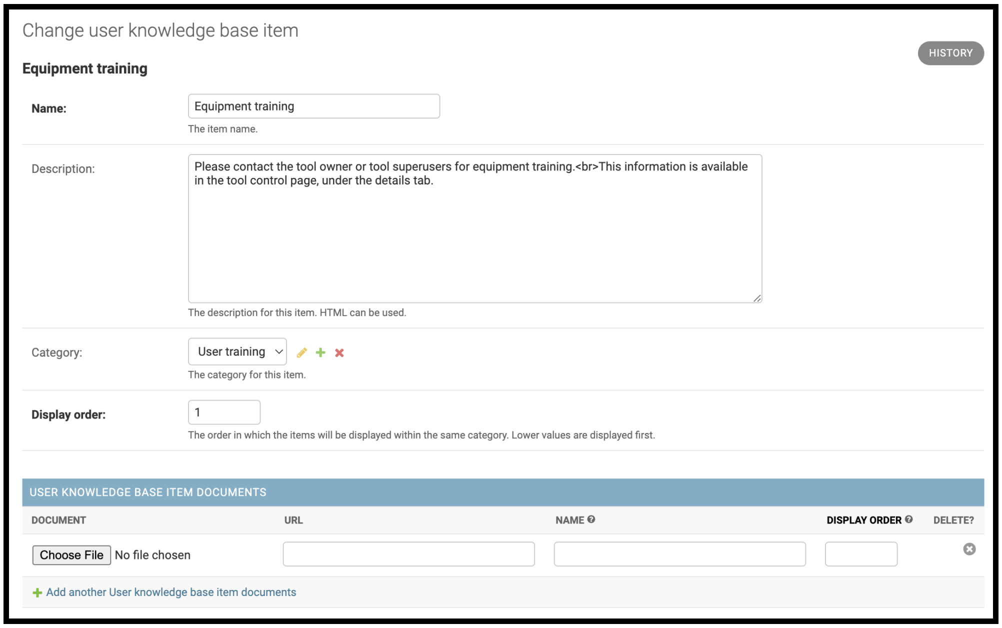


Figure 43.168: *User knowledge base items add/edit page*

- Name – the name of the user knowledge base item. (required).
- Description – the description for this item. HTML syntax can be used.
- Category – the category to display this item in.
- Display order – the order in which to display this item within the category. The lowest value is displayed first.
- Item documents – the list of documents for this item. Documents can be links or files to be uploaded in NEMO. Optionally, a name can also be entered. If not provided, it will default to the file name.

43.68.4 User access page

User knowledge base items are discussed in the Knowledge base chapter 13.

43.69 User preferences

43.69.1 Usage

The user preferences table records the preferences for each user that are settable in NEMO. User preferences are automatically created and updated from the user preference page.

43.69.2 Summary Page

The summary page provides a listing of user preferences (Figure 43.169). Click the user field in the row of interest to edit.

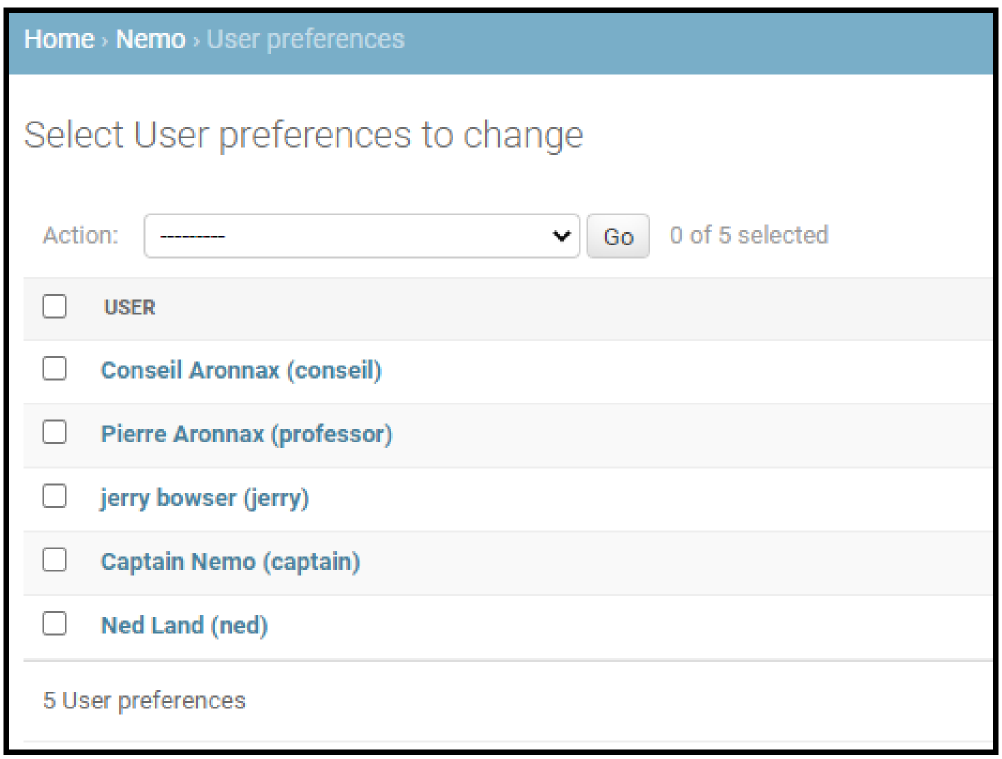


Figure 43.169: *User preference summary page*

43.69.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.170).

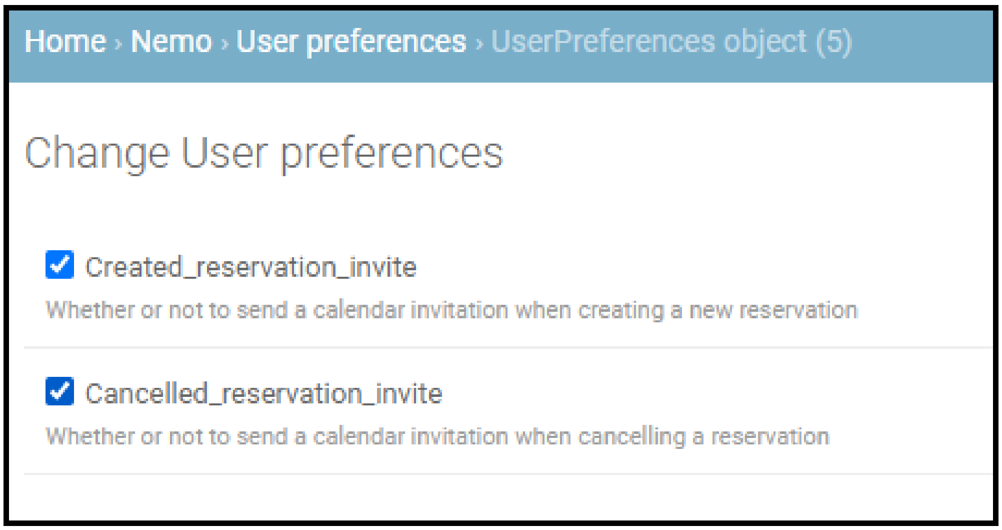


Figure 43.170: *User preference add/edit page*

- Created_reservation_invite – checkbox indicates whether or not to send a calendar invitation when creating a new reservation.
- Cancelled_reservation_invite – checkbox indicated whether or not to send a calendar invitation when cancelling a reservation.

43.69.4 User access page

User preferences are automatically created and updated from the user preference page, see chapter 19.

43.70 User types

43.70.1 Usage

User types are optional but can be useful for binning users aiding in future analysis and trending. User types, if used, must be created in this table view and can be any text name. Any number can be defined. If no user types are defined, they are not displayed on the user page. User types are discussed in the users page, see chapter 39.

43.70.2 Summary Page

The summary page provides a listing of user types (Figure 43.171). Click the name field in the row of interest to edit.

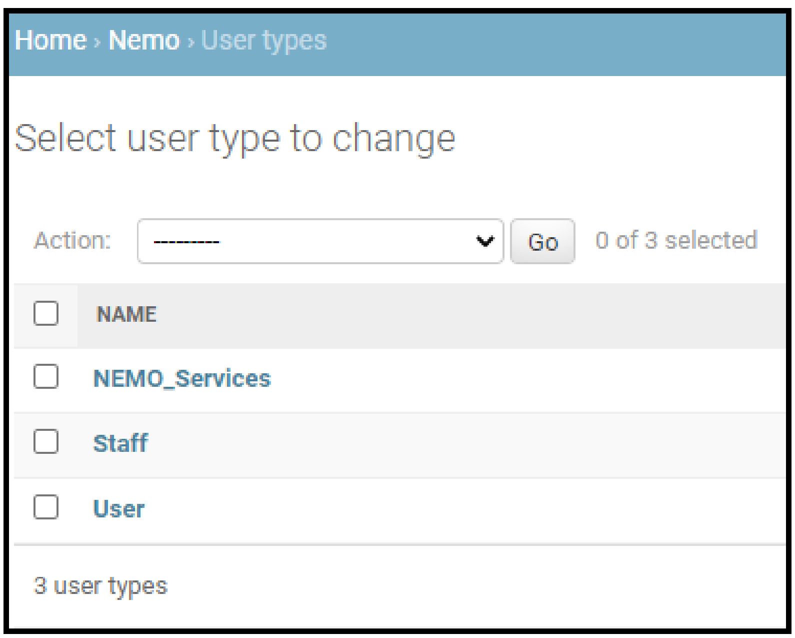


Figure 43.171: *User types summary page*

43.70.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 43.172).

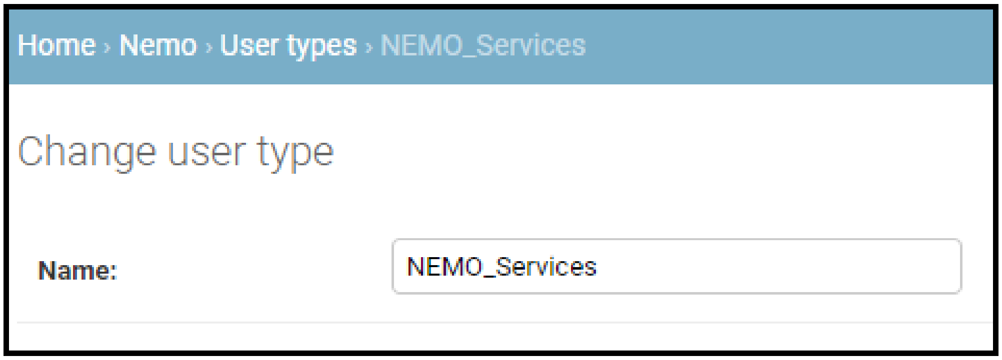


Figure 43.172: *User types add/edit page*

- Name – the name can be up to 200 characters (required).

43.70.4 User access page

There is no user access page to create user types however, user types are discussed in the users page, see chapter 39.

43.71 Users

43.71.1 Usage

The users table lists each user, their permissions, important dates, and qualifications. Users are created and maintained from the users page, see chapter 39. However, some attributes may be updated from other pages and some attributes may only be set directly from this page. If an attribute can be set from a page other than the users page, it will be noted in the field details below.

43.71.2 Summary Page

The summary page provides a listing of tools (Figure 43.173). Click the name field in the row of interest to edit.

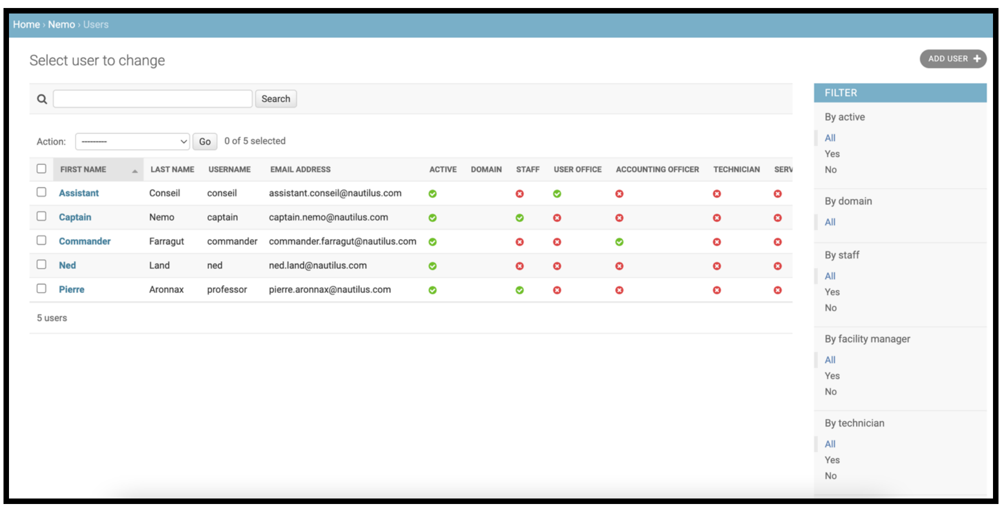


Figure 43.173: *Users summary page*

43.71.3 Fields

The add/change page for this table lists the fields that can be edited.

Personal Information (Figure 43.174):

- First name – text field of the user's first name. (required)
- Last name – text field of the user's last name. (required)
- Username – text field of the user's username. This is the name the user authenticates with. (required)
- Email address – text field of the users email address. NEMO uses emails to provide useful updates and information to users. (required)
- Badge number – the badge number associated with this user. This field must correctly correspond to a user in order for the entrance tablet and kiosk systems to work properly.
- Type – drop down list select user type from list. This is an informational user type for grouping users for future data analysis.
- Domain – If the identity service is being used to validate users against multiple domains, enter the active directory domain that the account resides on. Not needed for single domain implementations.
- Notes – free text area to enter any type of notes for this user.

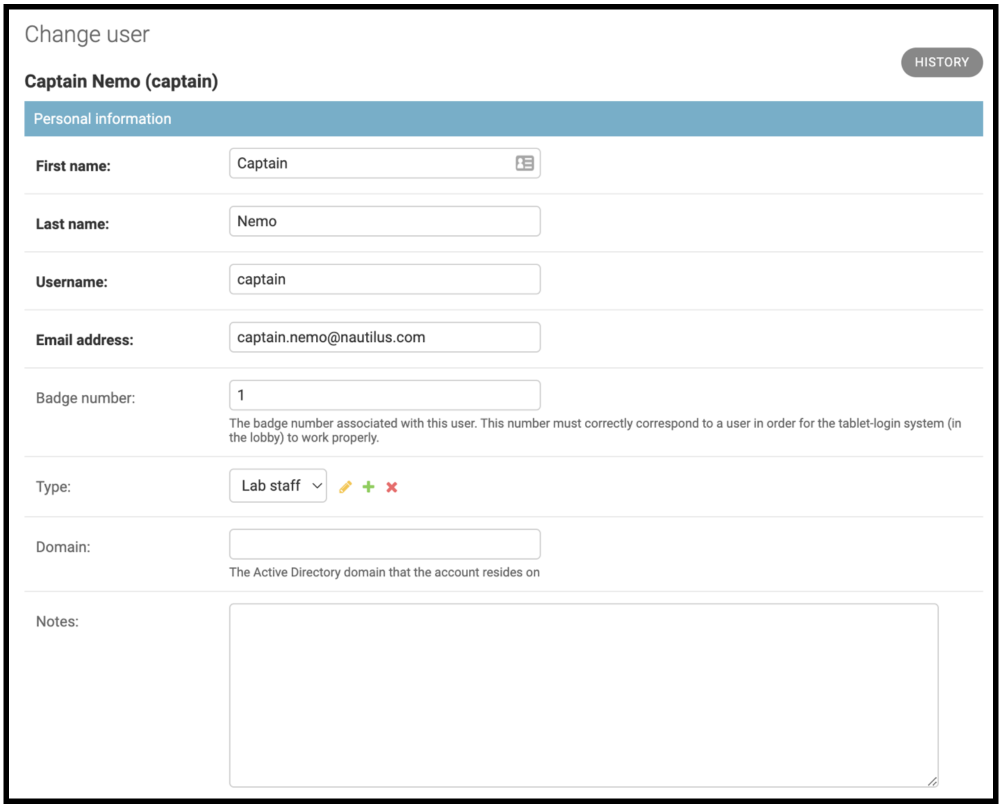


Figure 43.174: *Users personal information*

Permissions (Figure 43.175):

- Active account – checkbox designates whether this user can log in. Unselect this instead of deleting accounts.
- Staff – checkbox designates technical staff users. Can only be changed from this page.
- User office – checkbox designates User office staff members. Can only be changed from this page.
- Accounting officer – checkbox designates Accounting officers. Can only be changed from this page.
- Service personnel – checkbox designates this user as service personnel. Service personnel can operate qualified tools without a reservation even when they are shutdown or during an outage and can access authorized areas without a reservation. Can also be changed from the regular user page.
- Technician – checkbox specifies how to bill staff time for this user. When checked, customers are billed at technician rates. Can only be changed from this page.
- Facility manager – checkbox designates the facility manager(s). When checked, users will receive task status updates and will be able to approve/deny access requests. Can only be changed from this page.
- Administrator – checkbox designates that this user has all permissions without explicitly assigning them. Can only be changed from this page.
- Facility rules tutorial required – checkbox when selected, the user is blocked from all reservation and tool usage capabilities.

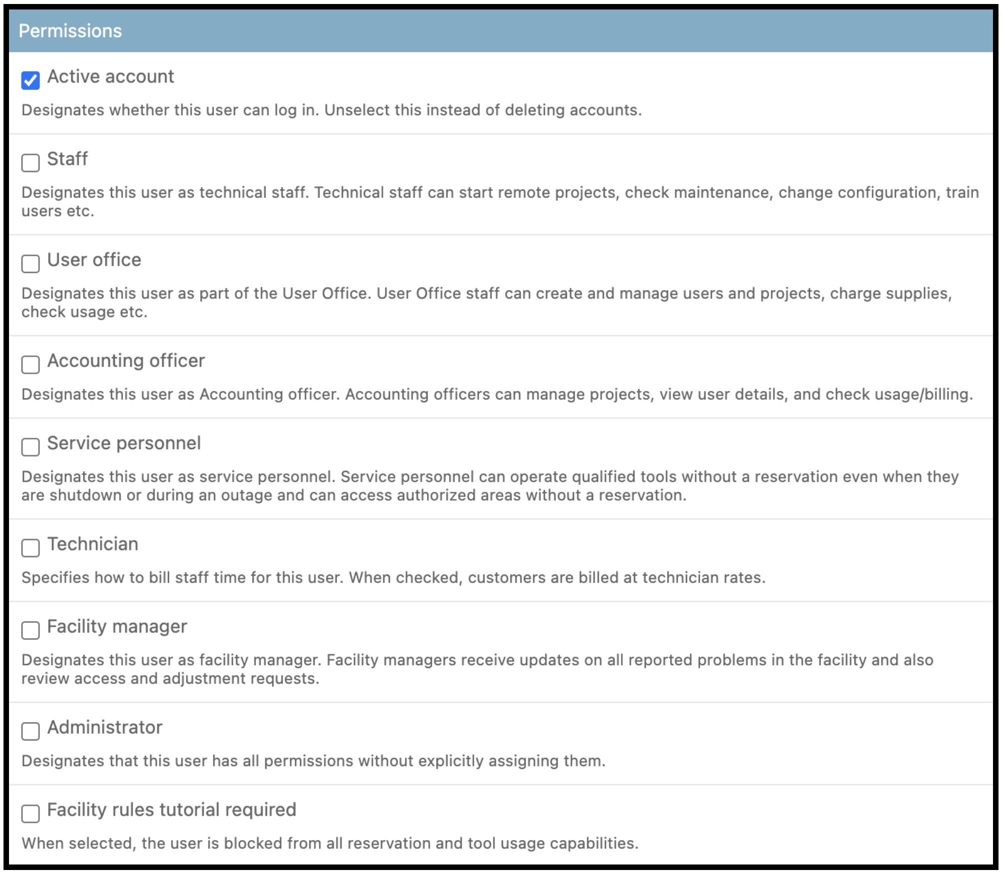


Figure 43.175: *Users permissions*

Additional Permissions (Figure 43.176):

- Groups – groups can be used to list common user permissions into a single item to make assignment easier. Select from available groups and click the right arrow to add to chosen groups. Multiple groups can be selected at the same time using shift or control keys. Groups can be created from the detailed administration groups page. Normally, groups do not need to be assigned to users. Can only be changed from this page.
- User permissions – user permissions pertain to either detailed administration access or behind the scenes activity such as doors and kiosks. Select from available user permissions and click the right arrow to add to chosen user permissions. Multiple user permissions can be selected at the same time using shift or control keys. Normally, user permissions do not need to be assigned to users. Can only be changed from this page.
- Physical access levels – physical access levels determine what area access a user has and when. Select from available physical access levels and click the right arrow to add to chosen physical access levels. Multiple physical access levels can be selected at the same time using shift or control keys.

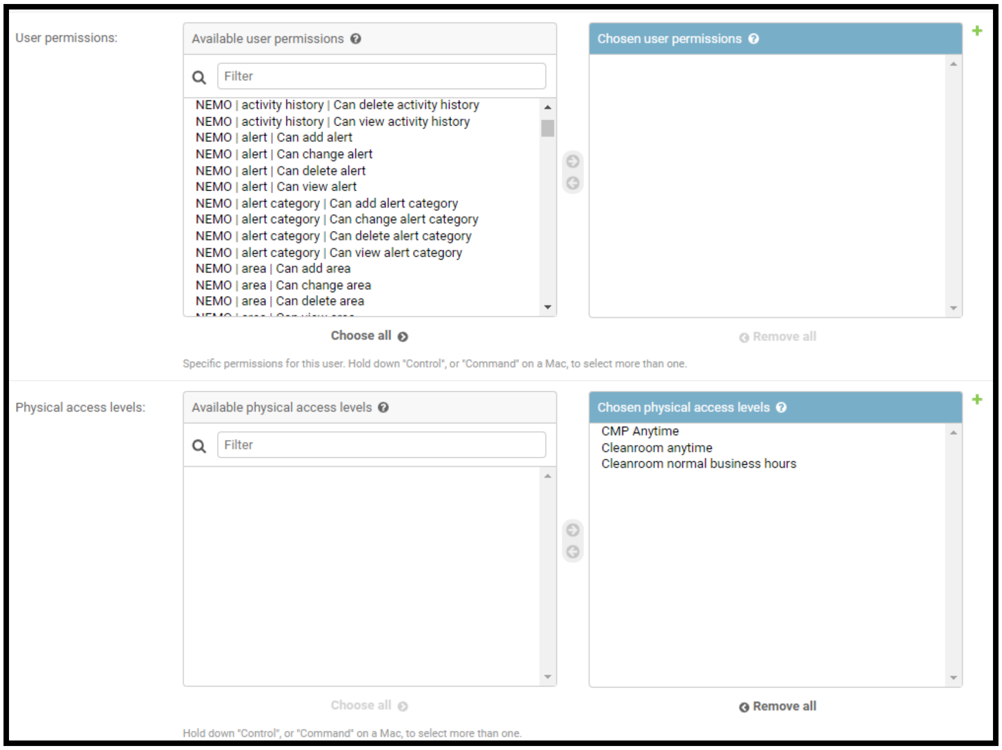


Figure 43.176: *Users additional permissions*

Important Dates (Figure 43.177):

- Date joined – date/time the user record was created. This field is automatically set and should not be changed.
- Last login – date/time the user last authenticated into NEMO. This field is automatically set and should not be changed.
- Active access expiration – date/time the user will lose all access rights. Typically, this is used to ensure that safety training has been completed by the user every year and that users don't have perpetual access.

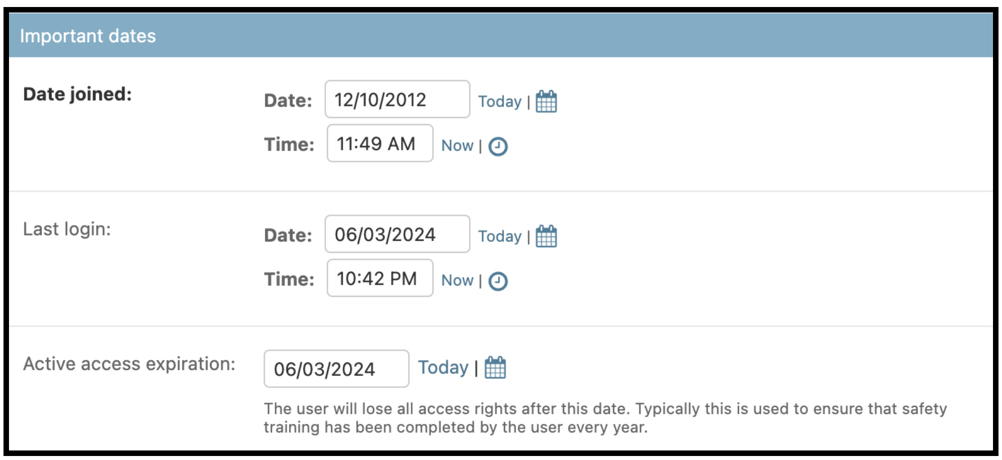


Figure 43.177: *Users important dates*

Facility Information (Figure 43.178 and Figure 43.179):

- Qualifications – select from available tool qualifications and click the right arrow to add to chosen tool qualifications. Multiple tool qualifications can be selected at the same time using shift or control keys.
- Backup owner on tools – select from available tools and click the right arrow to add the chosen tool. Multiple tools can be selected at the same time using shift or control keys.
- Superuser on tools – select from available tools and click the right arrow to add the chosen tool. Multiple tools can be selected at the same time using shift or control keys.
- Projects - select from available projects and click the right arrow to add to chosen projects. Multiple projects can be selected at the same time using shift or control keys.
- Managed projects - select from available projects and click the right arrow to add to chosen projects. Multiple projects can be selected at the same time using shift or control keys.

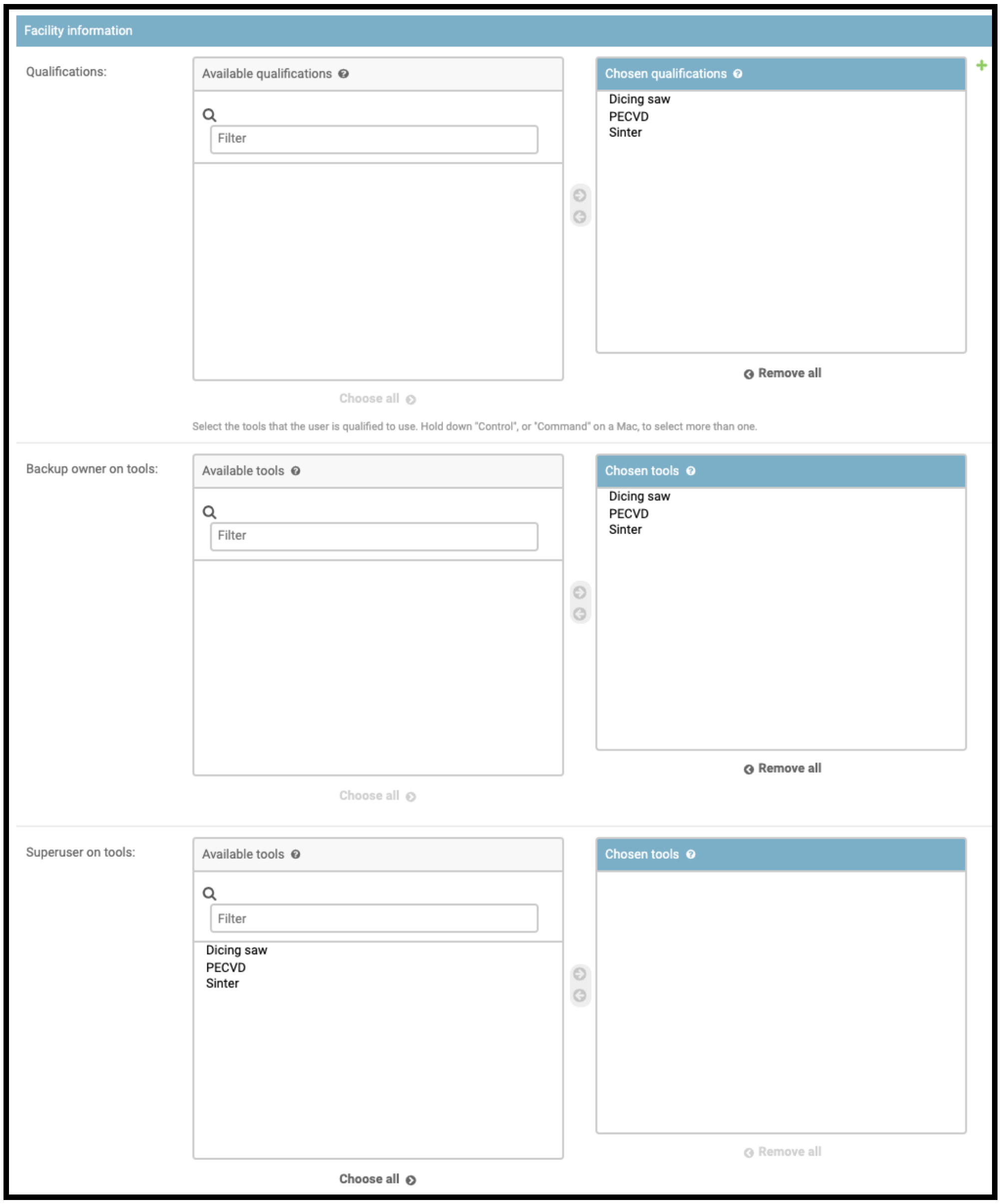


Figure 43.178: *Users facility information*

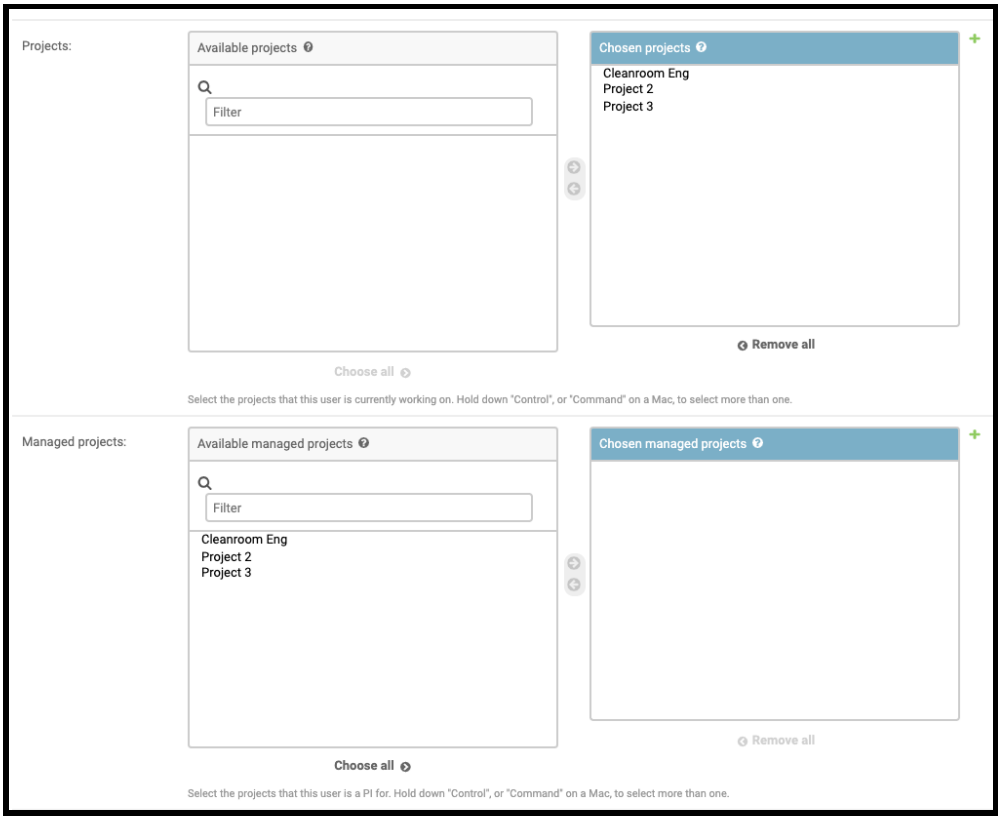


Figure 43.179: *Users facility information (continued)*

Other information (Figure 43.180):

- Onboarding phases – list of completed onboarding phases for the user.
- Safety trainings – list of safety trainings completed by the user.

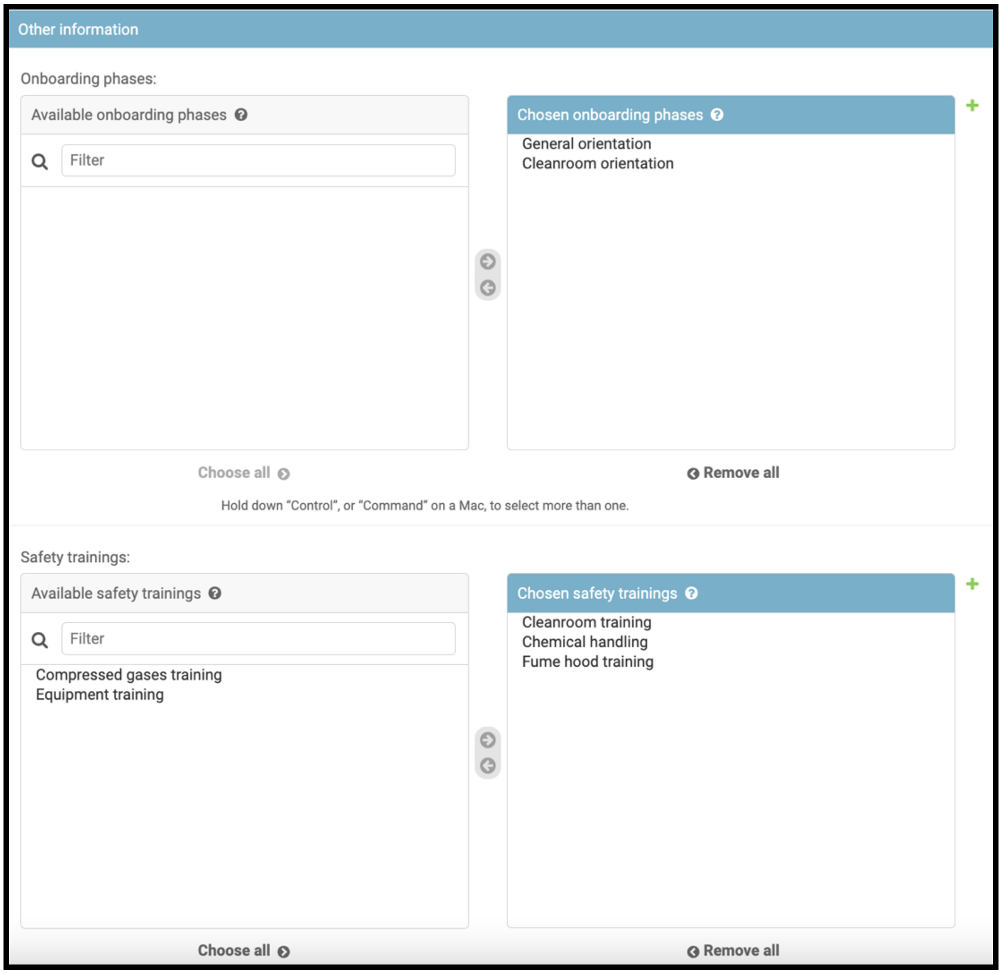


Figure 43.180: *Users other information*

43.71.4 User access page

Users are created and maintained from the users page (see chapter 39) or directly in this table view. The permissions that give elevated user status are only settable or updateable in this table view.

Once created, some parameters can be updated in NEMO pages other than the users page.

- Qualified users can also be managed on the training page, or the qualifications page.
- Projects can also be managed in the Accounts and projects section.

CHAPTER 44

Contracts and procurements

The contracts & procurements page provides a way to manage service contracts, procurements and contractor agreements.

44.1 Setup

To enable this feature, you need to install it using "python -m pip install nemo-sensors", then you need to add 'NEMO.apps.contracts' in INSTALLED_APPS in your settings.py. In addition, for email reminders to be sent, a timed service job must be properly configured and running which is described in the NEMO timed services section 54.3.

44.2 Usage

Select one of the available tabs (service contracts, procurements or contractors) to go to the corresponding list. (Figure 44.1).

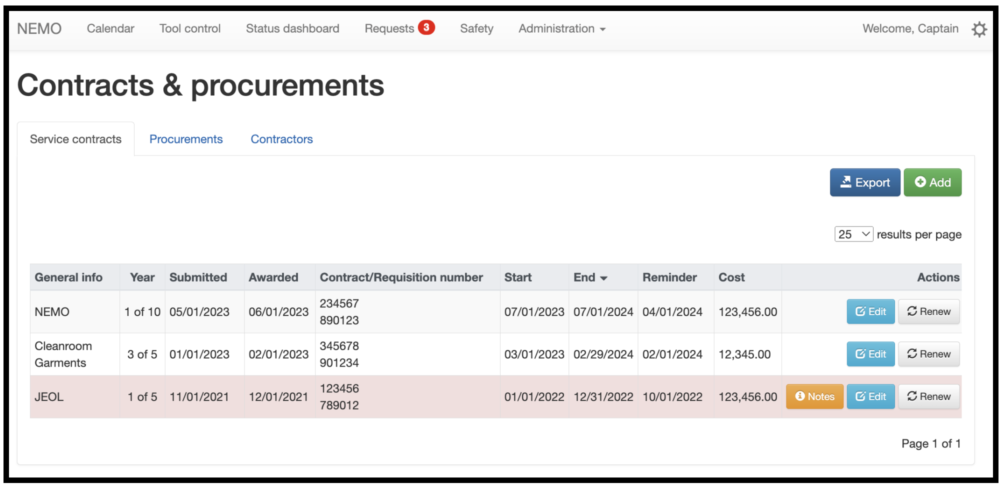


Figure 44.1: *Contracts and procurements*

44.2.1 Permissions

Permissions for service contracts, procurements and contractor agreements are controlled the following way:

- read/view permissions: you can customize which staff type (User office, Accounting officer, Technical staff) can view contracts by going to Customization → Contracts & procurements settings, see section 45.
- add/edit/renew permissions: those permissions are controlled by Django's internal permission system (can add procurements, can change service contracts etc.). Admins automatically have all permissions, other users will need to be given those permissions in Detailed administration → Users, see section 43.71.3 (Figure 43.176)

44.2.2 Service contracts tab

The service contracts tab allows users to see, add, edit and renew service contracts (Figure 44.2).

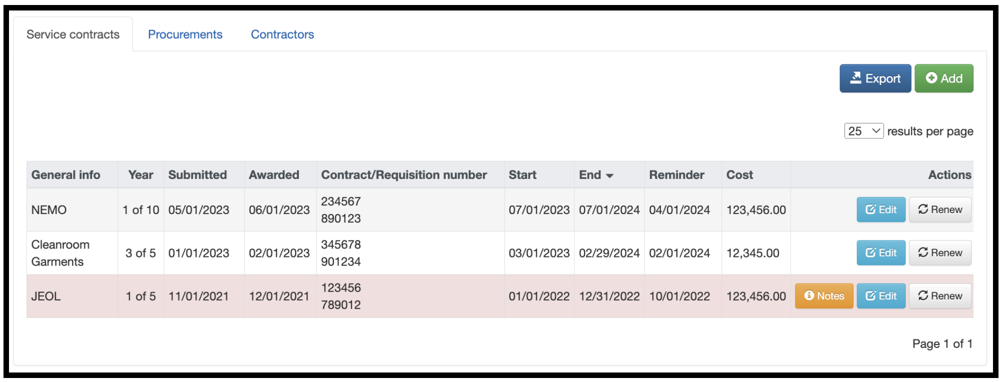


Figure 44.2: *Service contracts*

- To add a service contract, click on the Add button (Figure 44.3) and you will be redirected to the corresponding section in Detailed administration → Service contracts, section 46.1.2

Figure 44.3: *Add service contract*

- To edit a service contract, click on the Edit button (Figure 44.4) and you will be redirected to the corresponding section in Detailed administration → Service contracts, section 46.1.2

Figure 44.4: *Edit service contract*

- To renew a service contract, click on the Renew button (Figure 44.5) which will automatically create a new service contract with the same name, adding 1 to the current year. If the service contract is in its last year (5 out of 5 for example), a new service contract will be created starting back at year 1.

Figure 44.5: *Renew service contract*

- Expired service contracts, defined as service contracts with an end date in the past, will be displayed with a red background.
- Contracts in their renewal phase (between their reminder date and the end date) will be displayed with an orange background.

44.2.3 Procurements tab

The Procurements tab allows users to see, add and edit procurements (Figure 44.6).

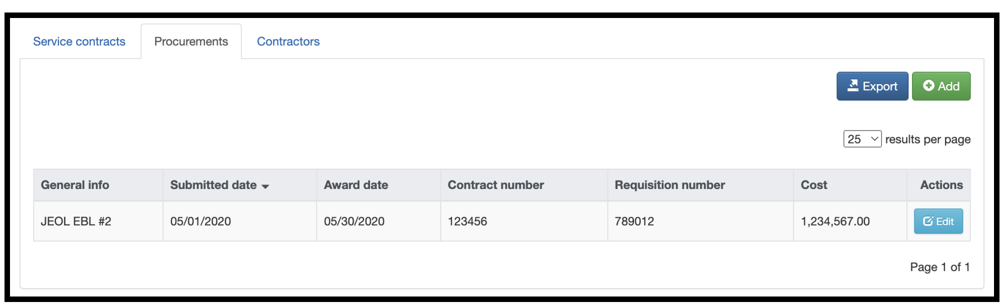


Figure 44.6: *Procurements*

- To add a procurement, click on the Add button (Figure 44.7) and you will be redirected to the corresponding section in Detailed administration $\rightarrow$ Procurements, section 46.2.2

Figure 44.7: *Add procurement*

44.2.4 Contractors tab

The contractors tab allows users to see, add, edit and renew contractor agreements (Figure 44.8).

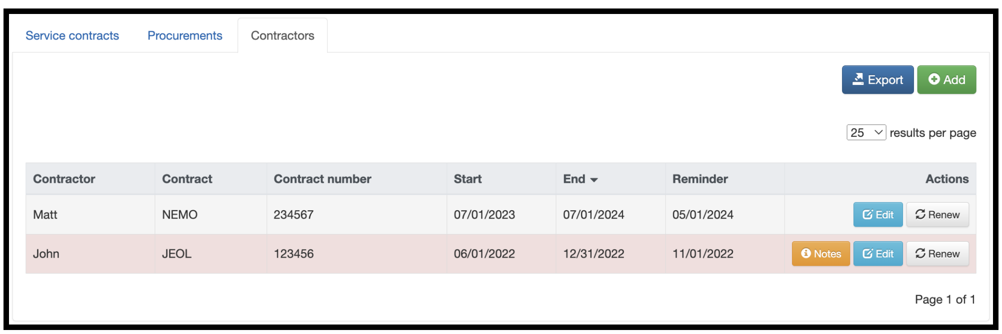


Figure 44.8: *Contractor agreements*

- To add a contractor agreement, click on the Add button (Figure 44.9) and you will be redirected to the corresponding section in Detailed administration $\rightarrow$ Contractor agreements, section 46.3.2.

Figure 44.9: *Add contractor agreement*

- To edit a contractor agreement, click on the Edit button (Figure 44.10) and you will be redirected to the corresponding section in Detailed administration → Contractor agreements, section 46.3.2

Figure 44.10: *Edit contractor agreement*

- To renew a contractor agreement, click on the Renew button (Figure 44.11) which will automatically create a new contractor agreement with the same name, starting on the end date of the previous agreement.

Figure 44.11: *Renew contractor agreement*

- Expired contractor agreements, defined as agreements with an end date in the past, will be displayed with a red background.
- Contractor agreements in their renewal phase (in between their reminder date and the end date) will be displayed with an orange background.

44.3 Export

Service contracts, procurements and contractor agreements can be exported by clicking the “Export” button on each respective tab (Figure 44.12). The data is exported in CSV format.

Figure 44.12: *Export button*

44.4 Web address

The contracts and procurements page is accessible at site-address/service_contracts/. The page is accessible from the navigation bar by clicking Administration then clicking Contracts & procurements.

44.5 Mobile device contracts and procurement page

There are no mobile device views for the contracts and procurements page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling.

44.6 Contract and procurements page customizations

Some contracts & procurements parameters (which staff roles have view access and the default label for contractors without a contract associated with them), can be customized in Customization $\rightarrow$ Contracts & procurements settings, see section 45. Add and change permissions for contracts are controlled directly in Detailed administration $\rightarrow$ Users section 43.71

CHAPTER 45

Contracts & Procurements Customization (admin only)

The contracts & Procurements settings can be used to control which roles (technical staff, user office, accounting staff) have access to the menu item in Administration, and to set the default option name when no contracts are assigned to contractors (Figure 45.1).

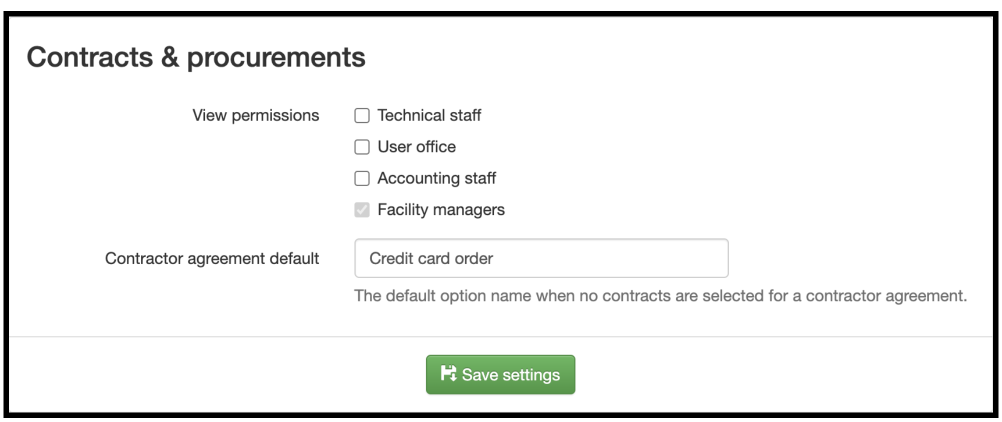


Figure 45.1: *Customization contracts & procurements settings*

By default, only facility managers have access to the "Contracts & Procurement" menu item in Administration. Using the options in this section, view permissions can also be given to Technical staff, User office or Accounting staff (Figure 45.2). (Adding and editing is limited to Administrators and users having being given the permission directly in Detailed Administration $\rightarrow$ Users section 43.71.

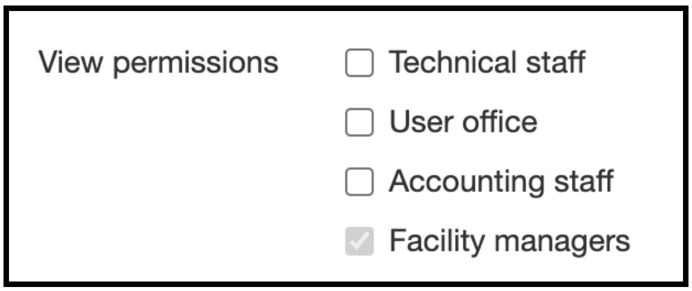


Figure 45.2: *Customization contracts & procurements view permissions*

When assigning contracts (Service contracts or Procurements) to Contractor agreements, the empty option label (usually blank) can be customized here to reflect another option, by default set to "Credit card order" (Figure 45.3).

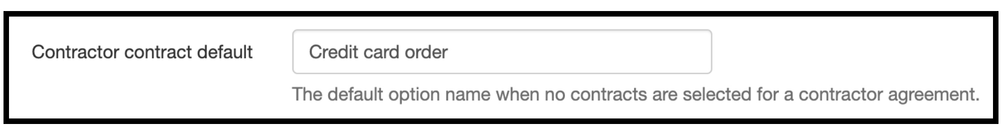


Figure 45.3: *Customization contracts & procurements contractor default contract*

CHAPTER 46

Detailed administration – Contracts (admin only)

This is the section regarding admin pages for Service contracts, Procurements and Contractor agreements.

It is available by going to Administration $\rightarrow$ Detailed administration $\rightarrow$ Contracts, or directly at <site_address>/admin/contracts.

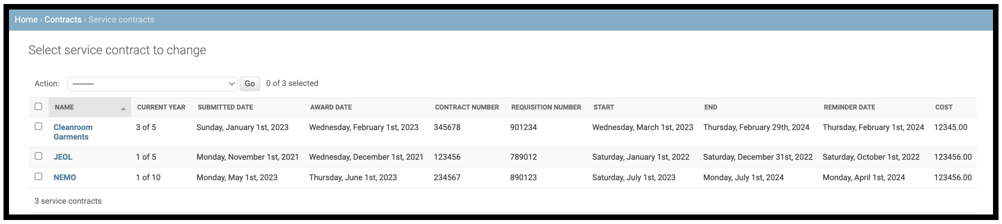
To enable contracts in your application, see the Contracts and procurements $\rightarrow$ Setup page in section 44.1.

46.1 Service contracts

46.1.1 Summary page

The summary page provides a listing of service contracts (Figure 46.1). Click the name field in the row of interest to edit.

Chapter 46 Detailed administration – Contracts (admin only)



NAME	CURRENT YEAR	SUBMITTED DATE	AWARD DATE	CONTRACT NUMBER	REQUISITION NUMBER	START	END	REMINDER DATE	COST
Cleanroom Garments	3 of 5	Sunday, January 1st, 2023	Wednesday, February 1st, 2023	345678	901234	Wednesday, March 1st, 2023	Thursday, February 29th, 2024	Thursday, February 1st, 2024	12345.00
JEOL	1 of 5	Monday, November 1st, 2021	Wednesday, December 1st, 2021	123456	789012	Saturday, January 1st, 2022	Saturday, December 31st, 2022	Saturday, October 1st, 2022	123456.00
NEMO	1 of 10	Monday, May 1st, 2023	Thursday, June 1st, 2023	234567	890123	Saturday, July 1st, 2023	Monday, July 1st, 2024	Monday, April 1st, 2024	123456.00

Figure 46.1: *Service contracts summary page*

46.1.2 Fields

The add/change page for this table lists the fields that can be edited (Figure 46.2 & Figure 46.3).

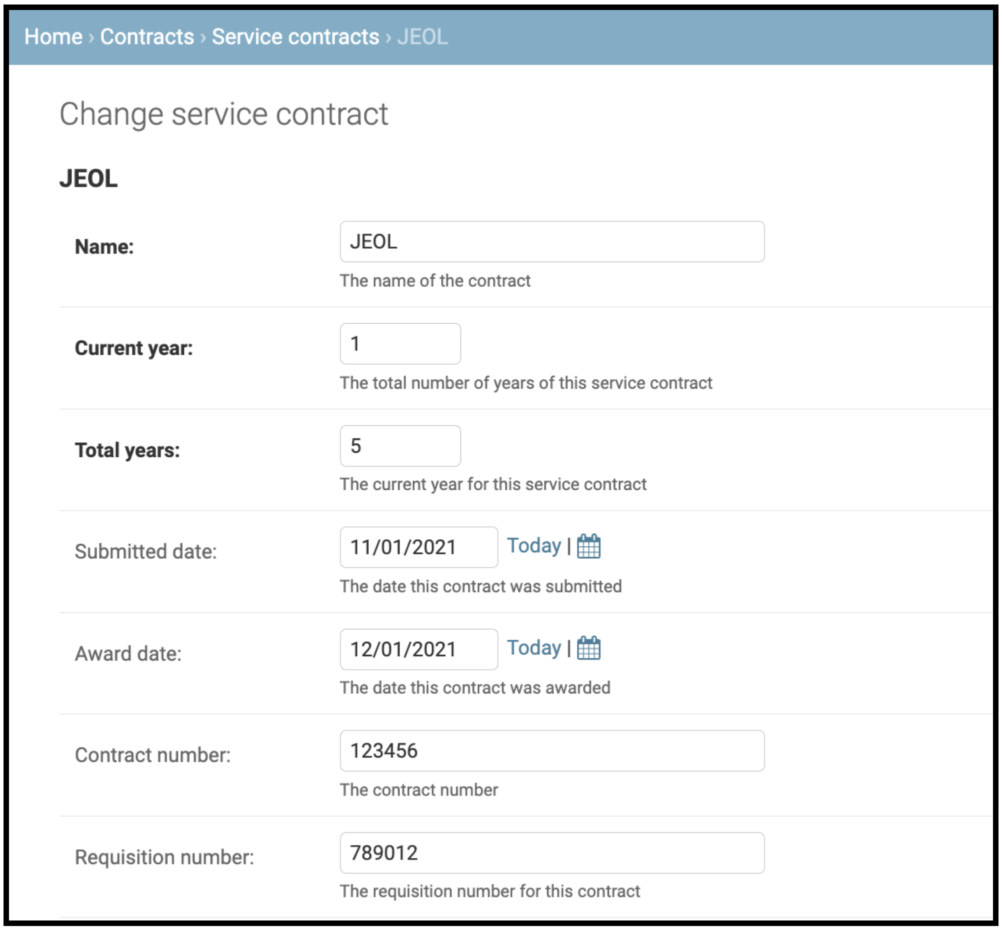


Figure 46.2: *Service contract fields*

Figure 46.3: *Service contract fields continued*

- **Name** – the name of this service contract (required).
- **Current year** – the current year of this service contract (required).
- **Total years** – the total number of years of this service contract (required).
- Submitted date – the date this service contract was submitted.
- Award date – the date this service contract was awarded.
- Contract number – the contract number for this service contract.
- Requisition number – the requisition number for this service contract.
- Start – the start date of this service contract.
- End – the end date of this service contract.

- Reminder date – the date to remind facility managers that this contract's renewal process needs to be started.
- Cost – the cost of this service contract.
- Notes – the notes for this service contract.
- Documents – the documents to add to this service contract.

46.1.3 User access page

The user access page for Service contracts is the Contracts & Procurements page. When adding or editing service contracts, the user page redirects the user to this admin page. Service contracts are discussed in the Contracts & procurements → Service contracts section 44.2.2.

46.2 Procurements

46.2.1 Summary page

The summary page provides a listing of procurements (Figure 46.4). Click the name field in the row of interest to edit.

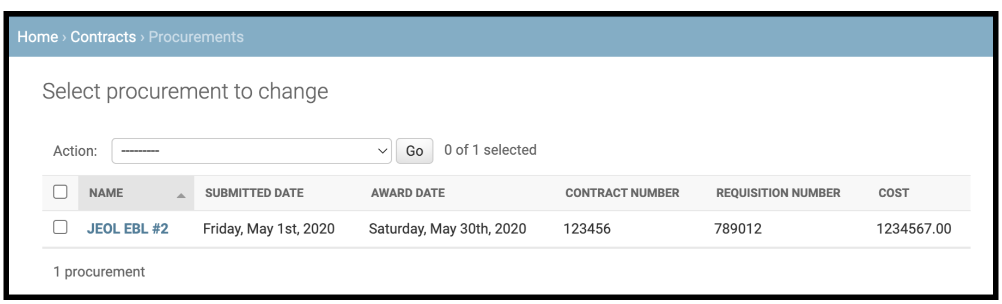


Figure 46.4: *Procurements summary page*

46.2.2 Fields

The add/change page for this table lists the fields that can be edited (Figure 46.5).

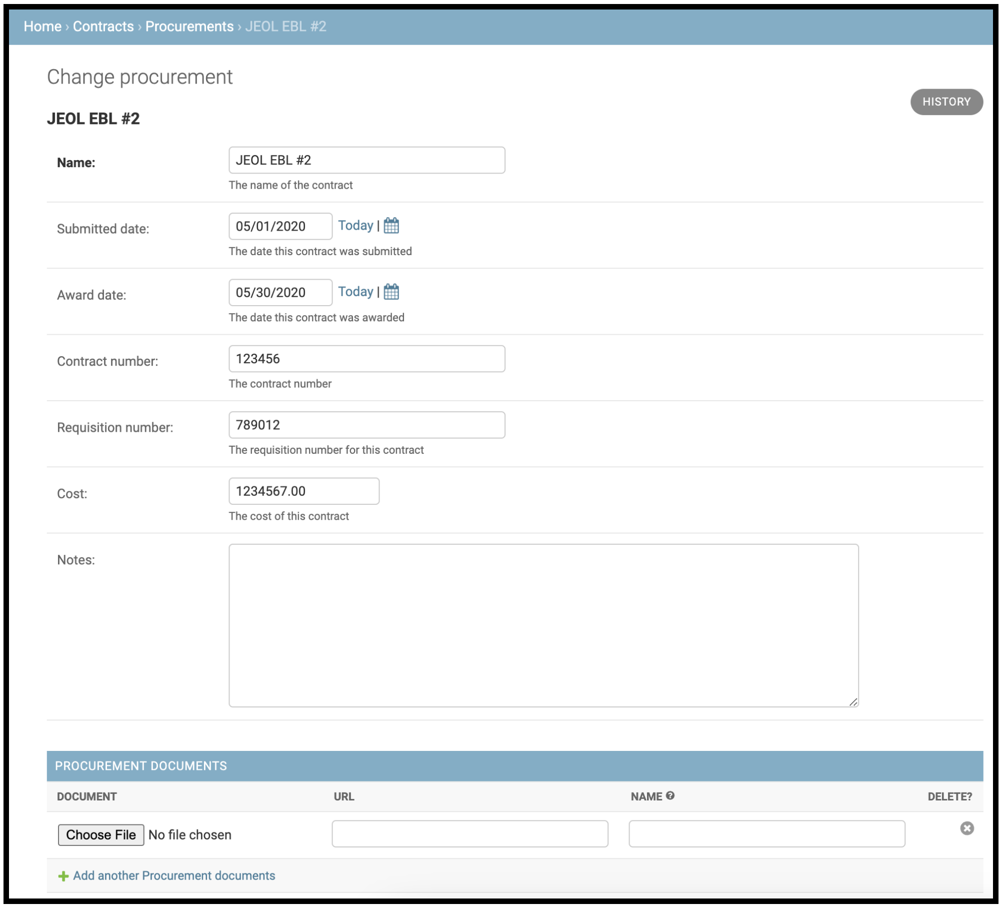


Figure 46.5: *Procurement fields*

- **Name** – the name of this procurement (required).
- Submitted date – the date this procurement was submitted.
- Award date – the date this procurement was awarded.

- Contract number – the contract number for this procurement.
- Requisition number – the requisition number for this procurement.
- Cost – the cost of this procurement.
- Notes – the notes for this procurement.
- Documents – the documents to add to this procurement.

46.2.3 User access page

The user access page for Procurements is the Contracts & Procurements page. When adding or editing procurements, the user page redirects the user to this admin page. Procurements are discussed in the Contracts & procurements → Procurements section 44.2.3.

46.3 Contractor agreements

46.3.1 Summary page

The summary page provides a listing of contractor agreements (Figure 46.6). Click the name field in the row of interest to edit.

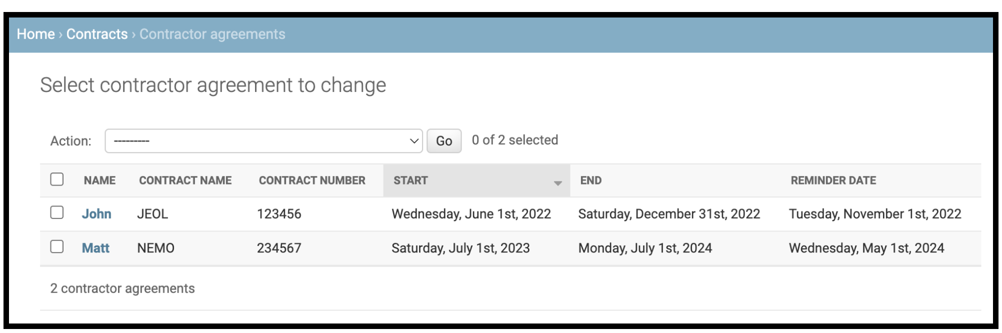


Figure 46.6: *Contractor agreements summary page*

46.3.2 Fields

The add/change page for this table lists the fields that can be edited (Figure 46.7).

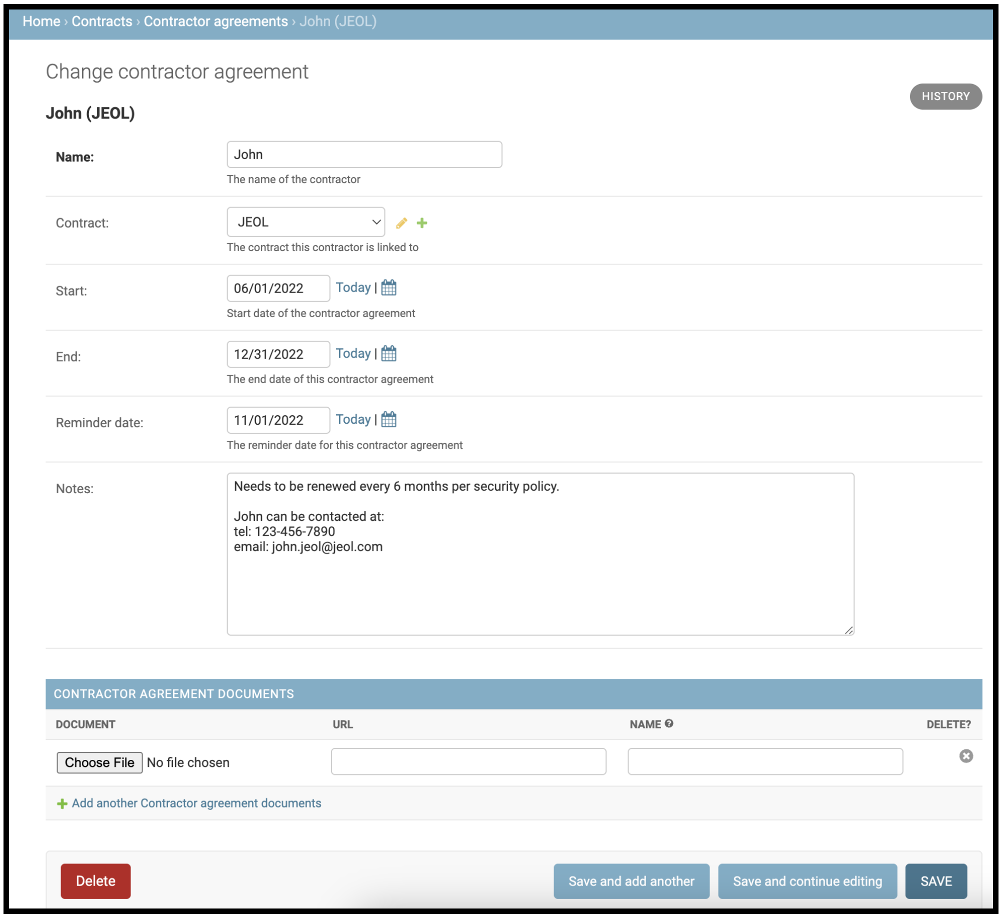


Figure 46.7: *Contractor agreement fields*

- **Name** – the name of this contractor (required).
- Contract – the contract (procurement or service contract or default) for this contractor agreement.
- Start – the start date of this contractor agreement.

- End – the end date of this contractor agreement.
- Reminder date – the date to remind facility managers that this contractor's renewal process needs to be started.
- Notes – the notes for this contractor agreement.
- Documents – the documents to add to this contractor agreement.

46.3.3 User access page

The user access page for Contractor agreements is the Contracts & Procurements page. When adding or editing contractor agreements, the user page redirects the user to this admin page. Contractor agreements are discussed in the Contracts & procurements $\rightarrow$ Contractor agreements section 44.2.4.

CHAPTER 47

Sensors

The sensors plugin provides a dashboard to navigate through sensors and sensor categories, display or export sensor data and alert logs.

47.1 Setup

To enable this plugin, you need to install it using “python -m pip install nemo-sensors”, then you need to add ‘NEMO.apps.sensors’ in INSTALLED_APPS in your settings.py. In addition, a timed service app must be properly configured and running which is described in the NEMO timed services section 54.3. Setting up sensor categories is discussed in Detailed administration $\rightarrow$ Sensor categories section 49.5. Setting up sensors is discussed in Detailed administration $\rightarrow$ Sensors chapter 49. Setting up email alerts is discussed in Detailed administration $\rightarrow$ Sensor alert emails subsection 49.1.

47.2 Usage

- Select a category or sensor from the dashboard (Figure 47.1) until reaching the desired sensor data.

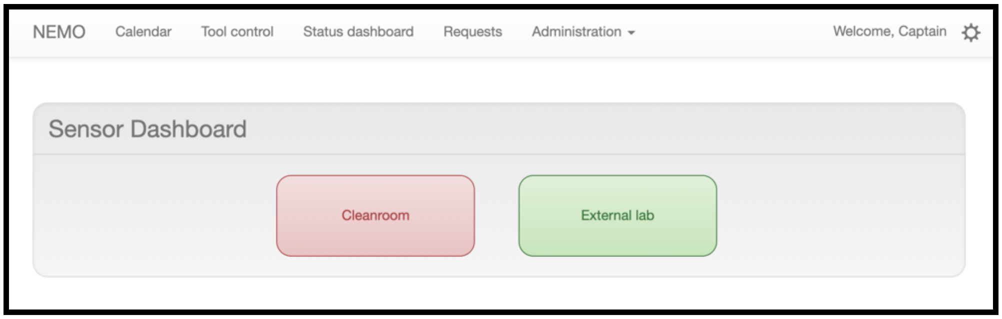


Figure 47.1: *Sensor data dashboard*

- The sensors square will display the latest value and time read (Figure 47.2).

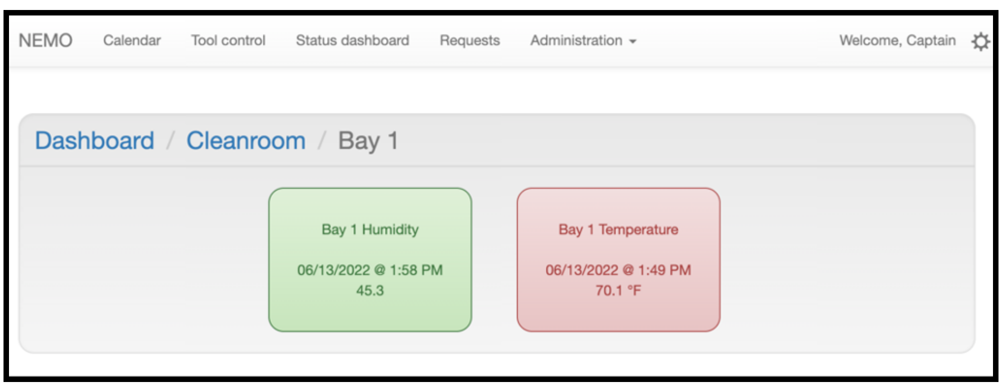


Figure 47.2: *Sensor data dashboard sensors*

- The date range can be changed by clicking on the calendar icon next to either the start or the end date (Figure 47.3). You can select a preset range or a custom date range.

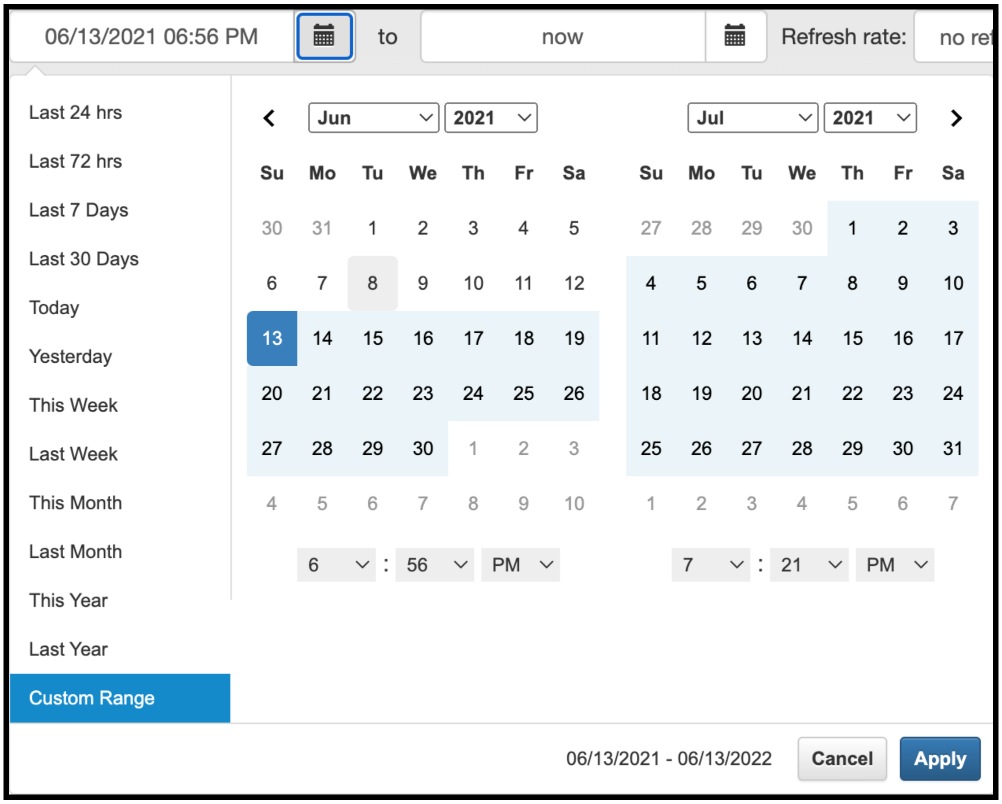


Figure 47.3: *Sensor data date range*

- To change the refresh rate, click on the drop down (Figure 47.4).

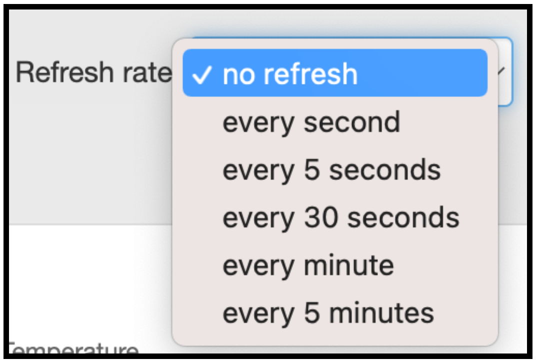


Figure 47.4: *Sensor data refresh rate dropdown*

47.3 Graph data

- A graph will show the data based on the default date range (Figure 47.5).

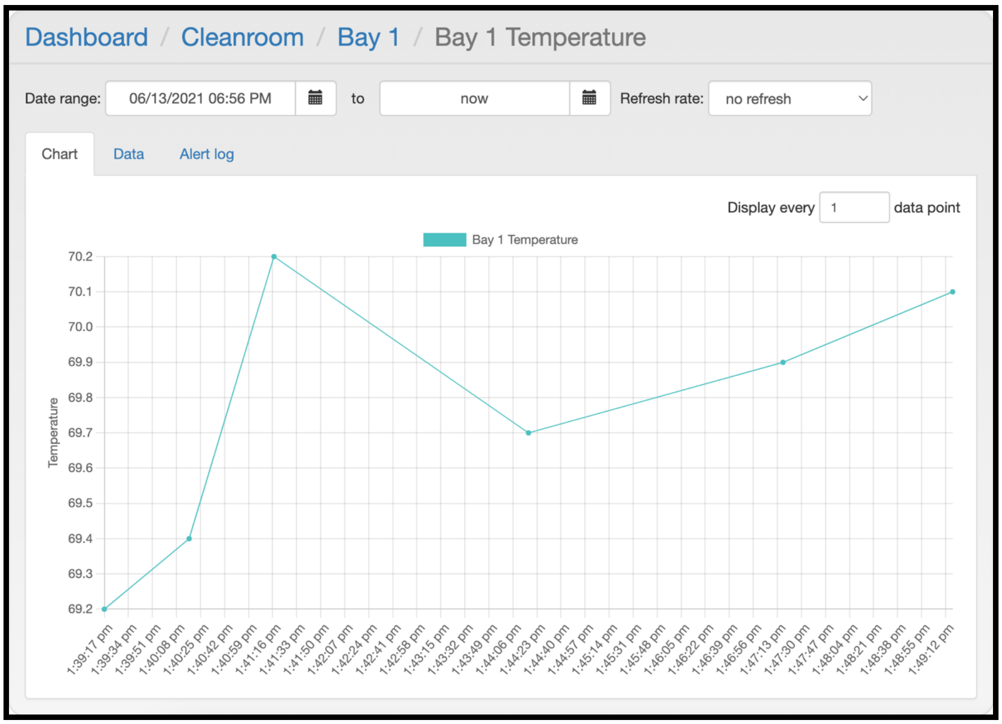


Figure 47.5: *Sensor data graph*

- Hovering over a single data point will display its detailed information (Figure 47.6).

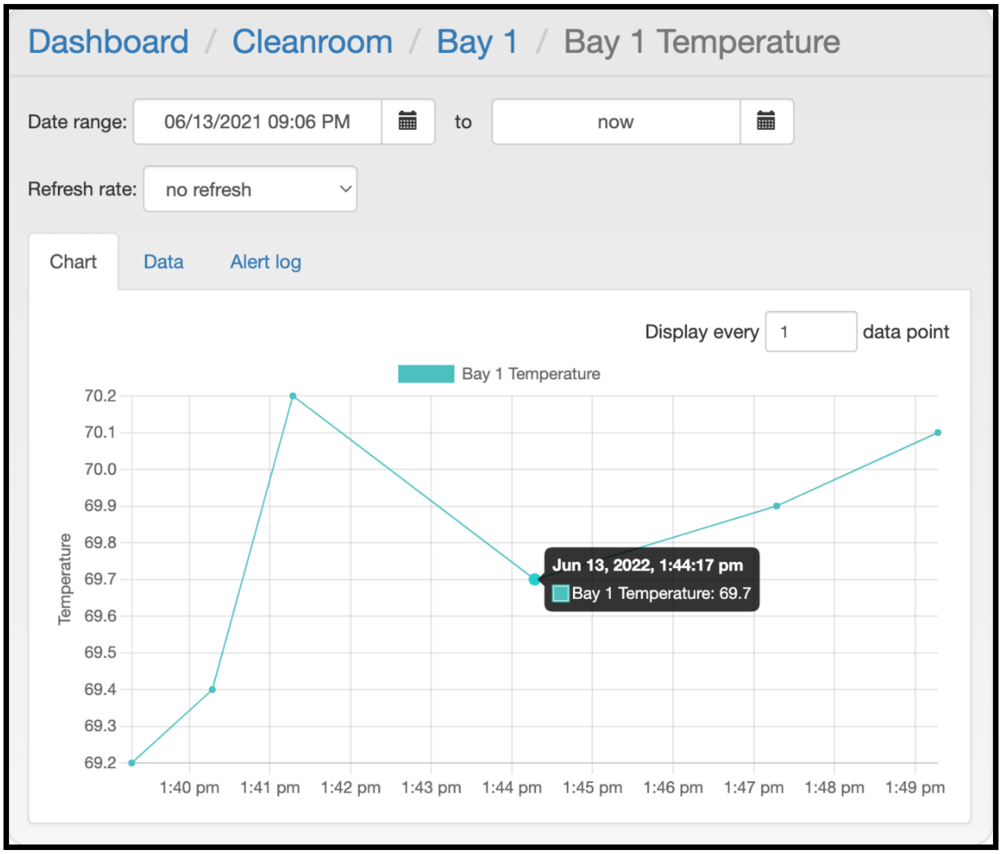


Figure 47.6: *Sensor data graph data point details*

- Less data points can be displayed by changing the input for every x data point (Figure 47.7).

Figure 47.7: *Sensor data graph change data points*

47.4 Data

- The data tab will show the time and raw values (Figure 47.8).

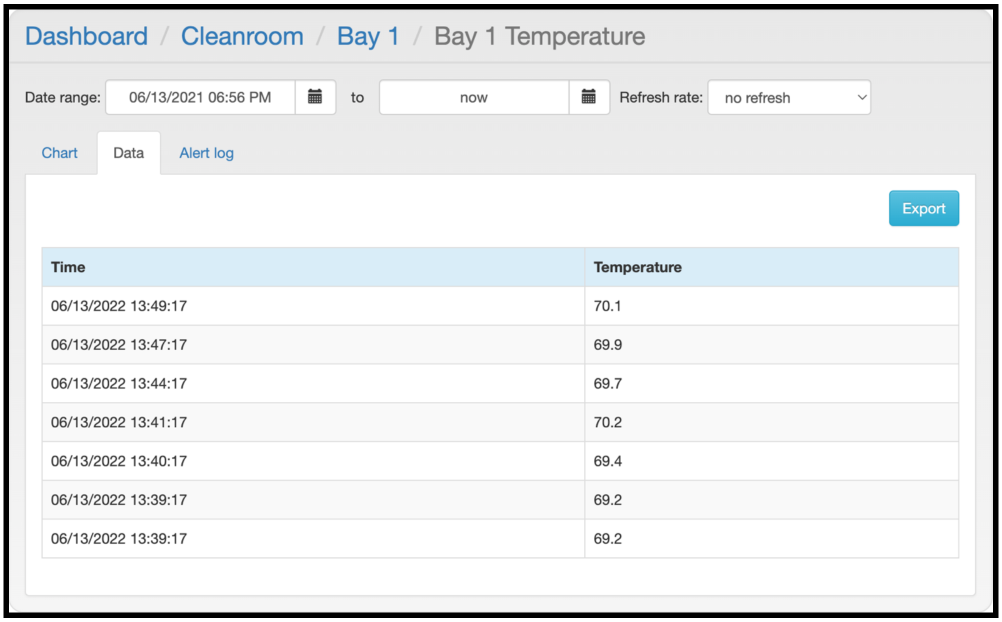


Figure 47.8: *Sensor data tab*

- You can click on the export button to get a CSV file (Figure 47.9).

Figure 47.9: *Sensor data export*

47.5 Alerts

- When an alert is triggered, the sensor and all its parent categories will be displayed in red color (Figure 47.10, Figure 47.11, Figure 47.12).

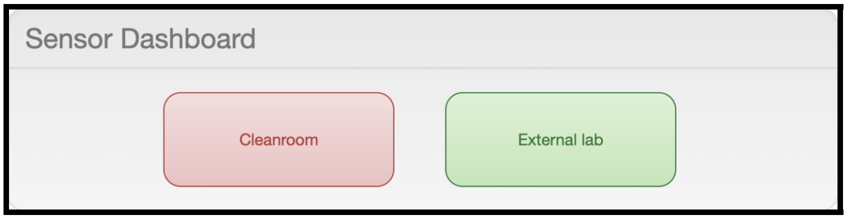


Figure 47.10: *Sensor data alert dashboard*

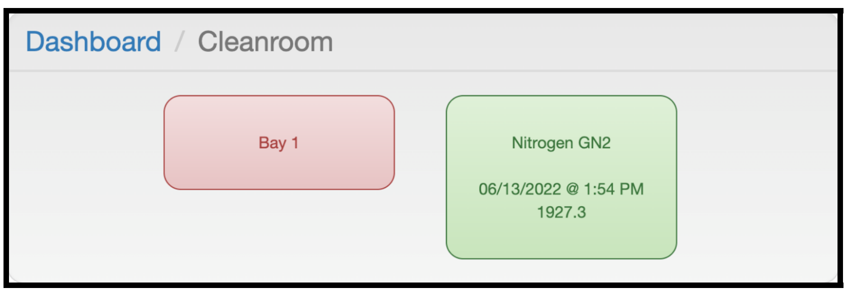


Figure 47.11: *Sensor data alert dashboard category*

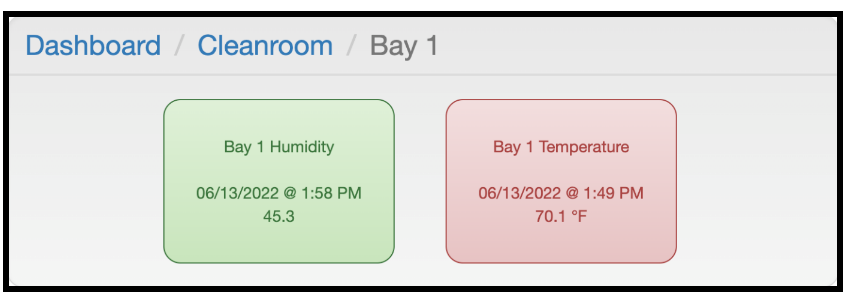


Figure 47.12: *Sensor data alert dashboard sensor*

- On a sensor page, the alert log tab will show when alerts were triggered and/or reset (Figure 47.13).

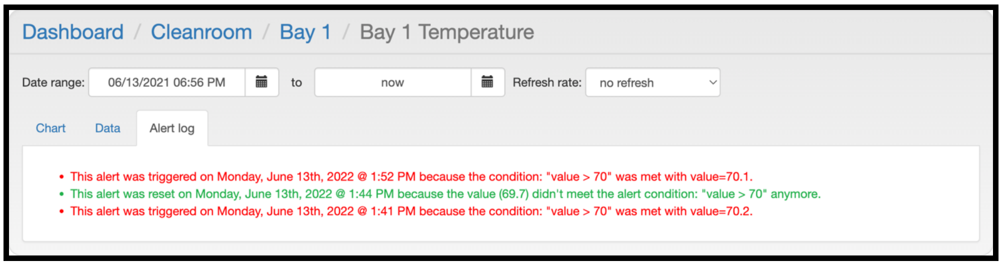


Figure 47.13: *Sensor data alert log*

47.6 Web address

The sensor data page is accessible at site-address/sensors/. The page is accessible from the navigation bar by clicking Administration then clicking Sensor data.

47.7 Mobile device sensor data page

There are no mobile device views for the sensor data page however, as the page size is reduced, the headings are stacked, and all information is viewable by scrolling. To visualize and interact with the graph data, it is recommended to use a tablet or desktop computer.

47.8 Sensor page customizations

Some sensor parameters can be customized in Customization $\rightarrow$ Sensor settings, see section 48.

CHAPTER 48

Sensors Customization (admin only)

The sensor data feature is detailed in the sensor data chapter 47 and can be configured to allow a certain number of retries, set a global alert email address, set the default date range, default refresh rate and customize the chart time format.

48.1 Sensor data settings

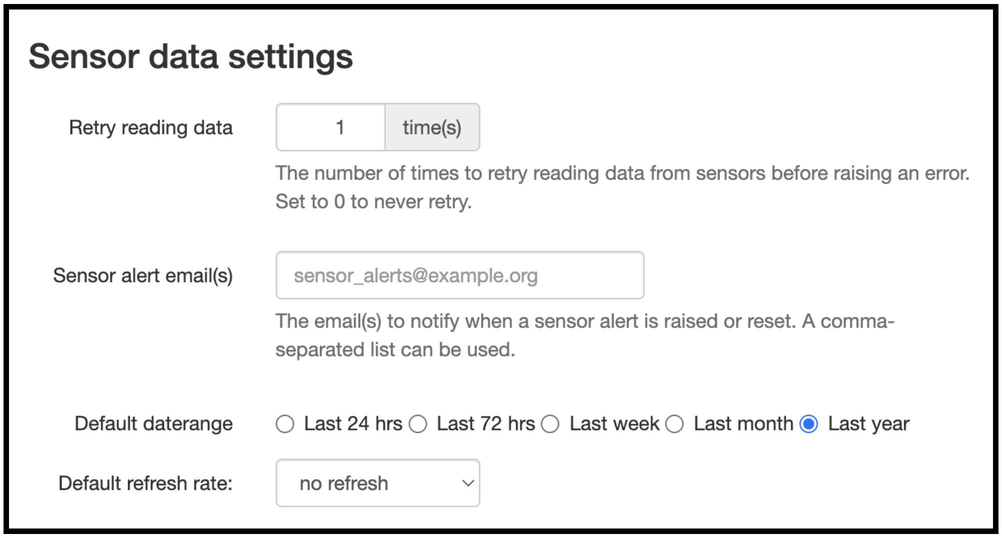


Figure 48.1: *Customization sensor data settings*

- When reading data from sensors, a number of retries can be specified to allow for one off connection/network interference without having it trigger an alert (Figure 48.2).

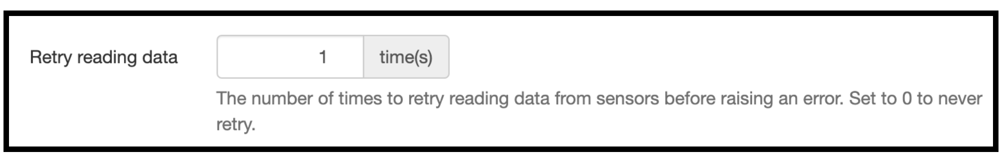


Figure 48.2: *Sensor data settings sensor reading retries*

- The sensor alert global email(s) will be notified every time any sensor alert is triggered or reset. A comma separated list can be used (Figure 48.3).

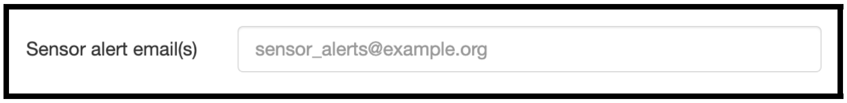


Figure 48.3: *Sensor data settings sensor alert emails*

- The default date range can be selected here and will apply to all sensor data (Figure 48.4).

Figure 48.4: *Sensor data settings default date range*

- The default refresh rate for all tabs in the sensor data pages can be set here (Figure 48.5).

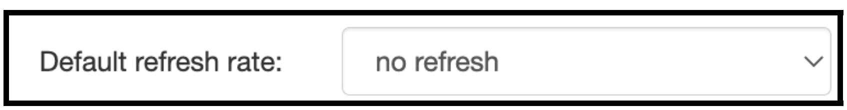


Figure 48.5: *Sensor data settings default refresh rate*

48.2 Sensor chart date formats

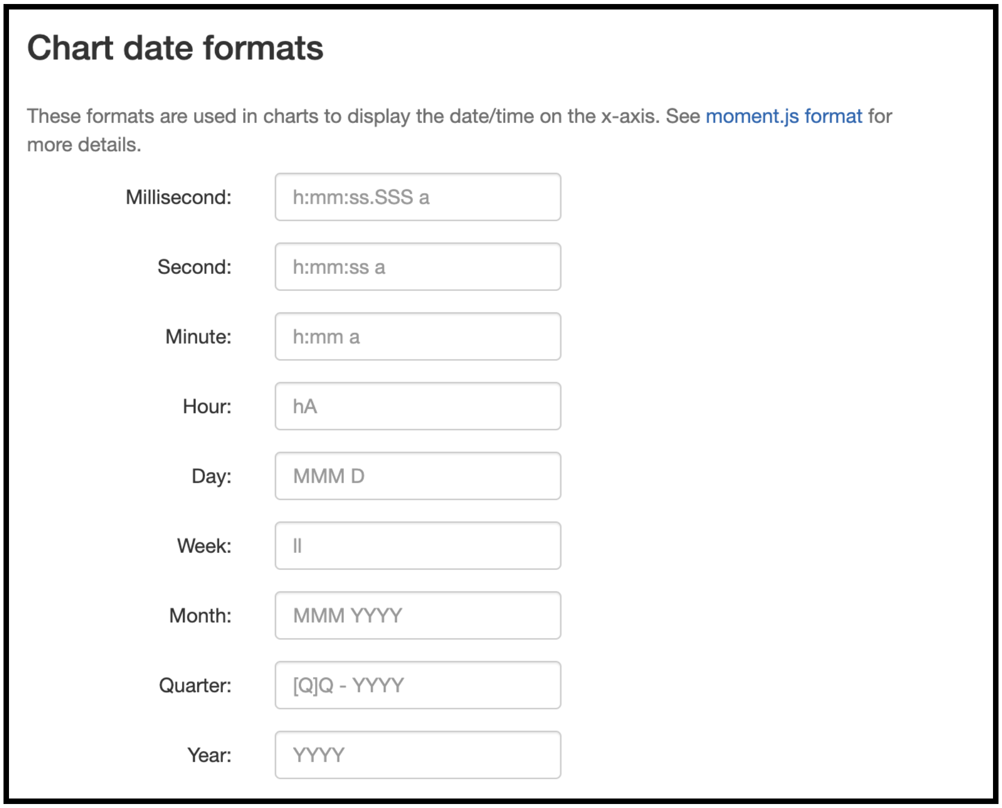


Figure 48.6: *Customization sensor chart date format settings*

The formats are used in the charts and depend on the window of time being displayed. It follows the syntax from moment js which can be found here.

CHAPTER 49

Sensors – Detailed administration (admin only)

This is the section regarding admin pages for Sensors.

It is available by going to Administration → Detailed administration → Sensors, or directly at <site_address>/admin/sensors.

To enable sensors in your application, see the Sensor data → Setup page in section 47.1.

49.1 Sensor alert emails

49.1.1 Usage

The sensor alert emails page lists alerts for sensors. Those alerts trigger an email as well as an alert log when the trigger condition is met, or when no data could be read if that option is selected.

49.1.2 Summary page

The summary page provides a listing of sensor alert emails (Figure 49.1). Click the sensor field in the row of interest to edit.

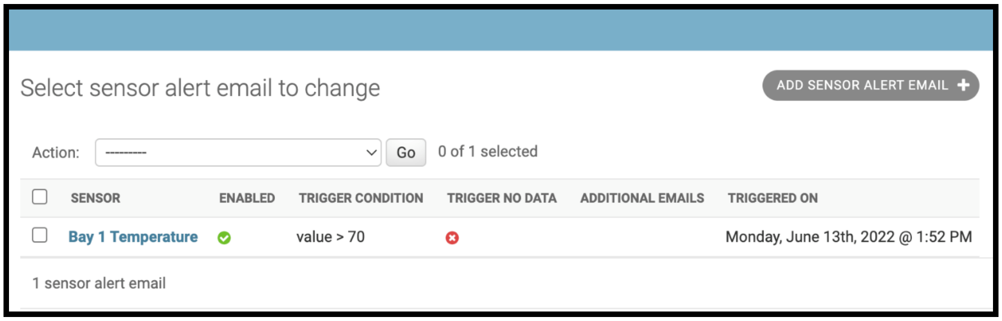


Figure 49.1: *Sensor alert emails summary page*

49.1.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.2).

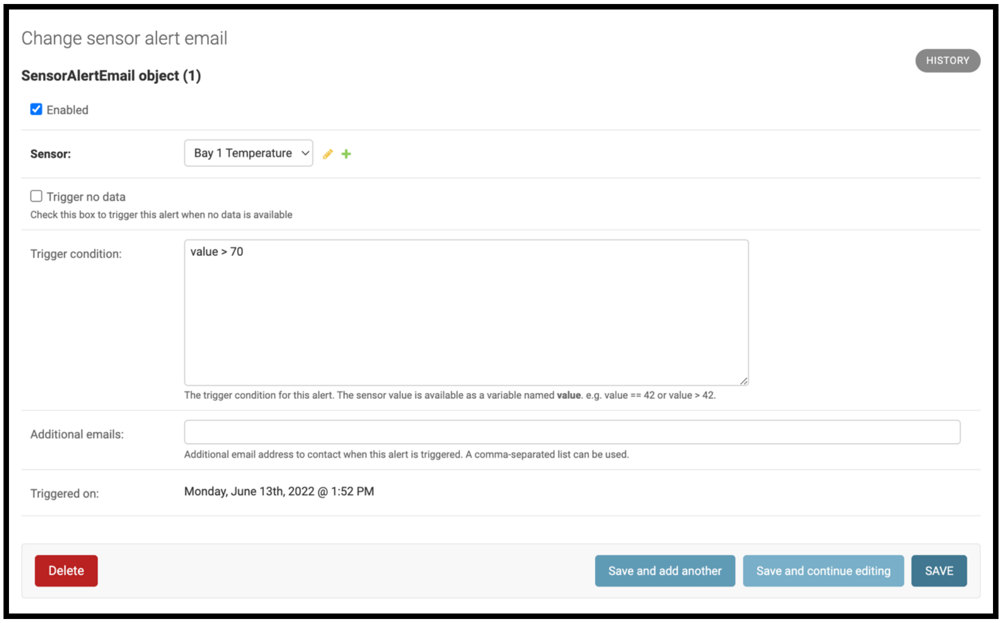


Figure 49.2: *Sensor alert email fields*

- Enabled – uncheck to disable the alert.
- Sensor – the sensor this alert should apply to (required).
- Trigger no data – check the box to have this alert triggered when no data is read.
- Trigger condition – the condition that will trigger this alert. Mathematical functions and operators can be used. The sensor value is available as the variable “value”. For example: “abs(value) > 42”. The result will be evaluated as a python Boolean. See

https://docs.python.org/3/library/stdtypes.html#truth-value-testing for details on what is considered true/false in python.

- Additional emails – text field of additional email addresses to send the alert email to. A comma separated list can be used.
- Triggered on – read only field showing the last time the alert was triggered.

49.1.4 User access page

There is no user access page to create sensor alert emails. However, sensor alerts are discussed in the Sensor data → Alerts section 47.5.

49.2 Sensor alert logs

49.2.1 Usage

The sensor alert logs page is a read-only page displaying the history of all alert logs. It will display the alert details from the time the alert was triggered, even if the information has changed since.

49.2.2 Summary page

The summary page provides a listing of sensor alert logs (Figure 49.3). Click the id field in the row of interest to edit.

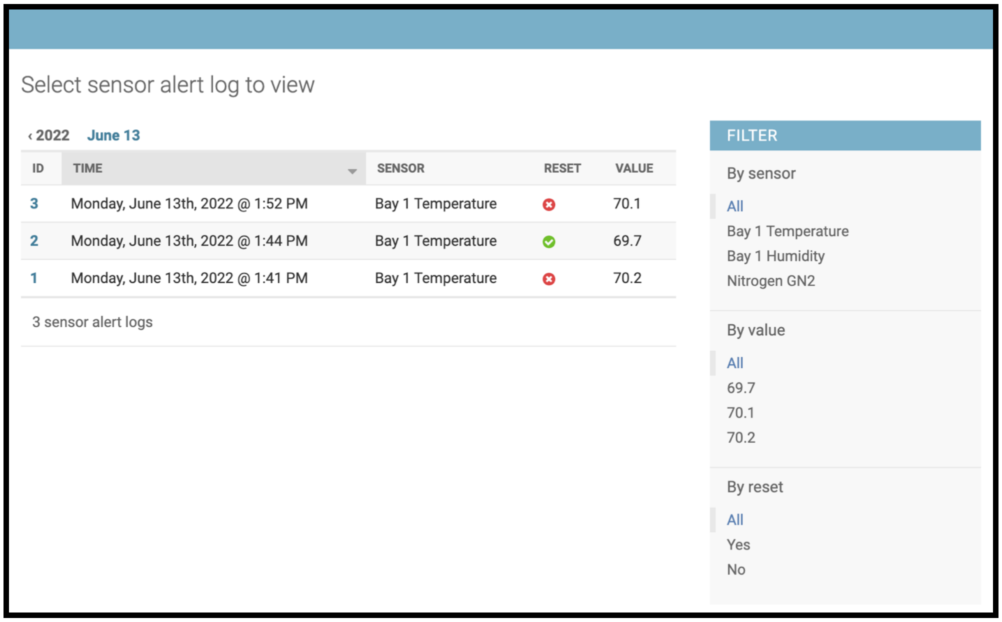


Figure 49.3: *Sensor alert logs summary page*

49.2.3 Fields

The view page for this table lists the read-only fields (Figure 49.4).

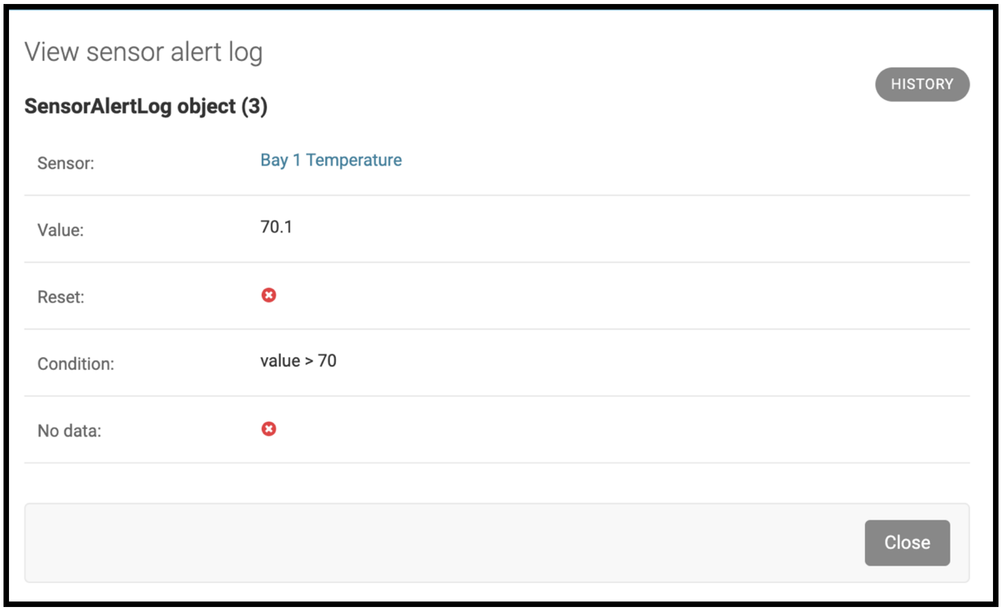


Figure 49.4: *Sensor alert log fields*

- Sensor – read-only sensor
- Value – read-only sensor value at the time of the alert
- Reset – read-only flag, whether the alert was set or reset
- Condition – read-only text of the trigger condition at the time of the alert
- No data – read-only flag, whether the alert trigger condition included triggering when no data is read

49.2.4 User access page

There is no user access page to create sensor alert logs. However, sensor alerts logs are discussed in the Sensor data → Alerts section 47.5.

49.3 Sensor card categories

49.3.1 Usage

Sensor card categories are used to link a sensor class in sensor.py to sensor cards so NEMO knows how to talk to the sensor. A sensor card category should be created for each sensor class in sensors.py that will be used to control sensors.

49.3.1.1 Summary page

The summary page provides a listing of sensor card categories (Figure 49.5). Click the name field in the row of interest to edit.

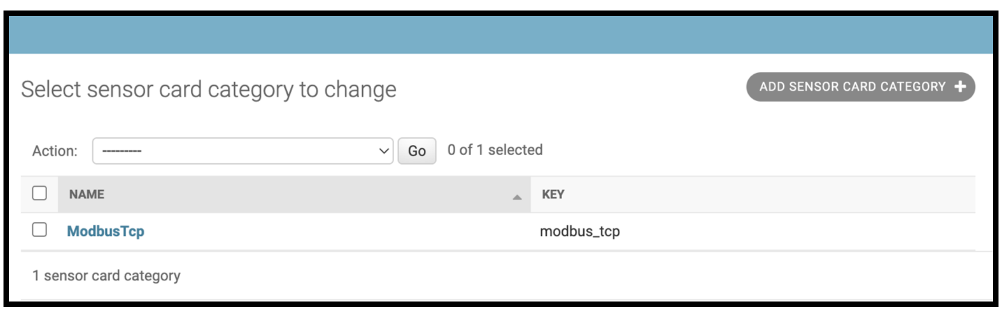


Figure 49.5: *Sensor card categories summary page*

49.3.2 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.6).

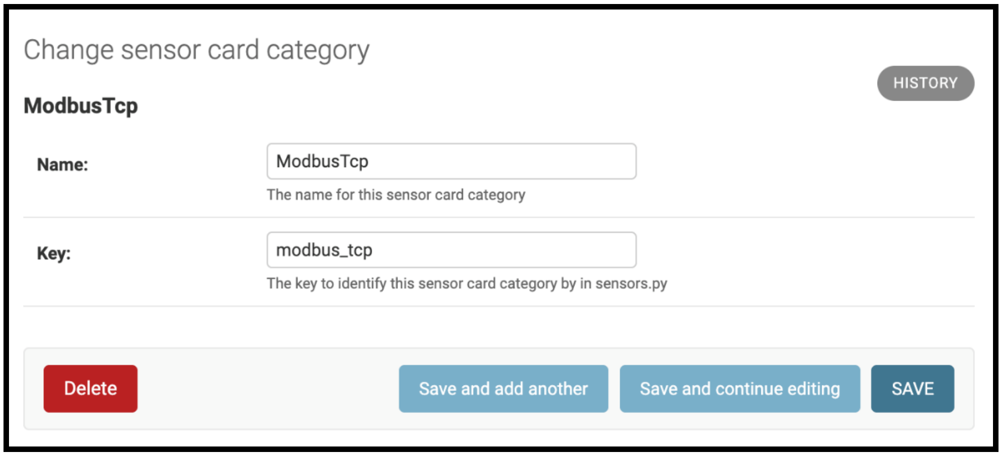


Figure 49.6: *Sensor card category fields*

- Name – name can be up to 200 characters (required).
- Key – The key to identify this sensor card category in sensors.py (required).

The sensors.py file has a dictionary that links this key name to each sensor class in sensors.py. Users can create their own sensor class and access it in NEMO by updating the dictionary to include their custom class (Figure 49.7).

```
sensors: Dict[str, Sensor] = {"modbus_tcp": ModbusTcpSensor()}
```

Figure 49.7: *Sensor card categories example dictionary in sensors.py*

49.3.3 User access page

There is no user access page to create sensor card categories. Sensor card categories, if used, must be created in this table view and can be any text name. Sensor card categories are used in the sensor cards table to define how NEMO should communicate with the sensors.

49.4 Sensor cards

49.4.1 Usage

Sensor cards define the communication parameters with a sensor device. Regardless of whether single sensors or multi-sensor devices are used, each device will require definition as sensor card. Information such as IP address, port number and sensor category define how NEMO will communicate with the device.

49.4.2 Summary page

The summary page provides a listing of sensor cards (Figure 49.8). Click the name field in the row of interest to edit.

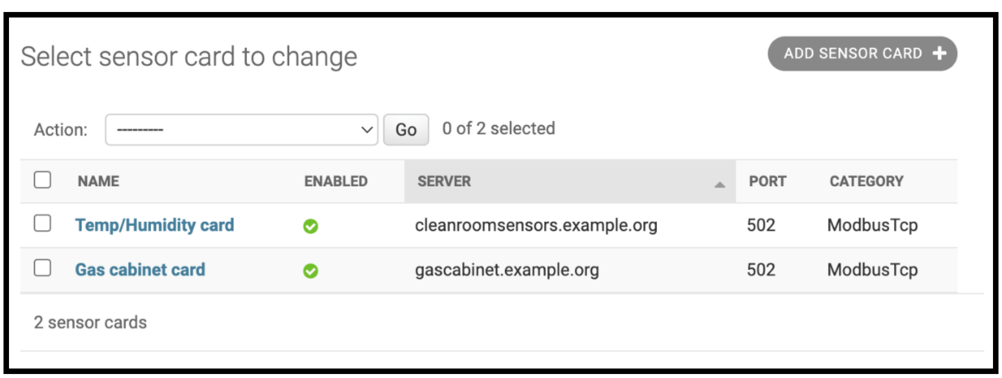


Figure 49.8: *Sensor cards summary page*

49.4.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.9).

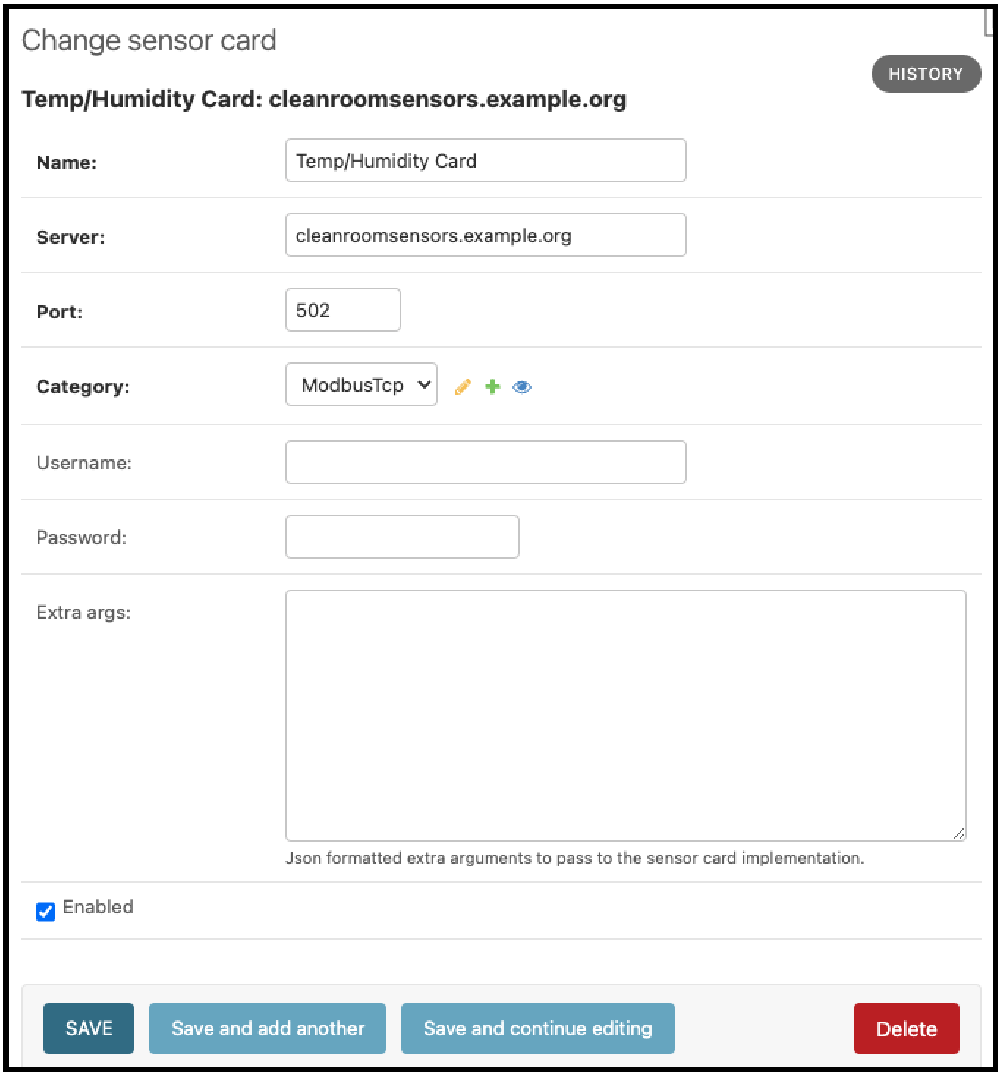


Figure 49.9: *Sensor card fields*

- Name – name can be up to 200 characters (required).

- Server – IP address or FQDN of interlock device (required).
- Port – port number to access device through (required). ModbusTcp default port is 502.
- Category – sensor card category selectable from drop down list (required). See Sensor card categories in section 49.3.
- Username – if a username and password is required to access the sensor device, enter the username.
- Password – if a username and password is required to access the sensor device, enter the password.
- Extra args – JSON field that can be used by sensor card implementations for different purposes. For ModbuTCP sensor cards the attribute "timeout" can be used to specify the connection timeout.
- Enabled – check box to set the status of the device, normally checked.

49.4.4 User access page

There is no user access page to create sensor cards. Sensor cards must be created in this table view. Sensor cards are used in the sensors table to define which sensor device to talk to.

49.5 Sensor categories

49.5.1 Usage

The sensor categories page lists categories for sensors. It provides a way to organize sensors with multiple level hierarchies.

49.5.2 Summary page

The summary page provides a listing of sensor categories (Figure 49.10). Click the name field in the row of interest to edit.

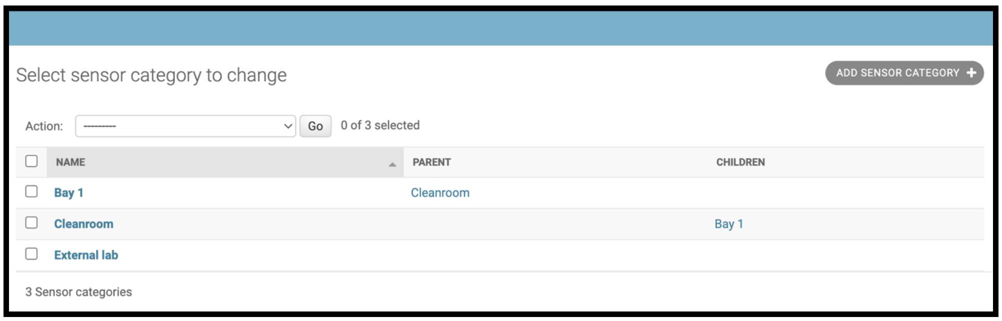


Figure 49.10: *Sensor categories summary page*

49.5.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.11).

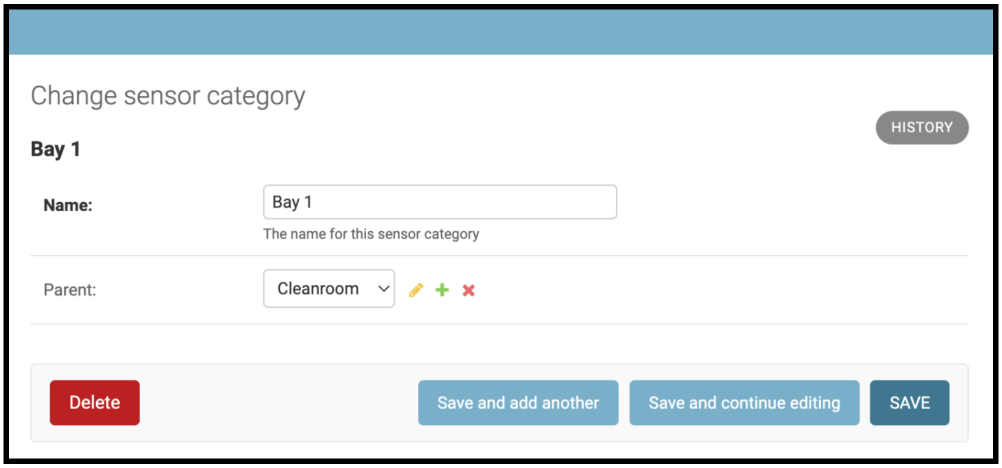


Figure 49.11: *Sensor category fields*

- Name – text field of the sensor category name (required).
- Parent – drop down list of sensor categories to select as a parent category.

49.5.4 User access page

There is no user access page to create sensor categories. However, sensor categories are discussed in the Sensor data chapter 47.

49.6 Sensor data

49.6.1 Usage

The sensor data page lists data points for sensors.

49.6.2 Summary page

The summary page provides a listing of sensor data (Figure 49.12). Click the created date field in the row of interest to edit.

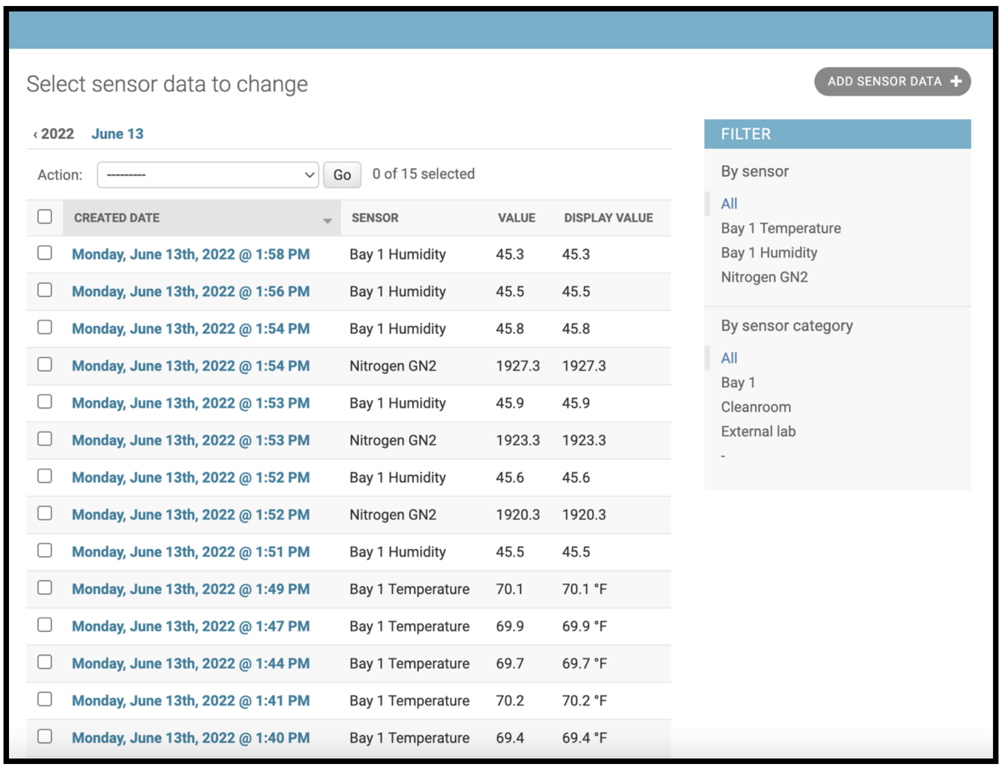


Figure 49.12: *Sensor data summary page*

49.6.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.13). Sensor data point created date cannot be changed. It is automatically added as the current date when a new sensor data object is created.

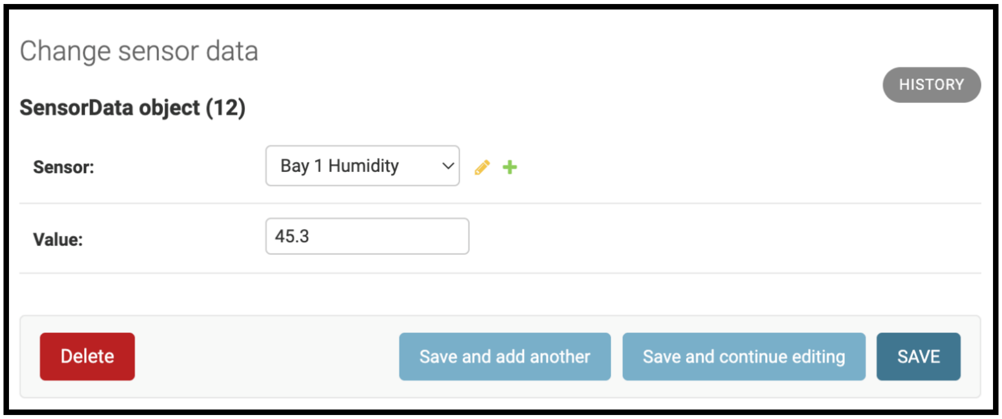


Figure 49.13: *Sensor data fields*

49.6.4 User access page

There is no user access page to create sensor data. However, sensor data is discussed in the Sensor data chapter 47.

49.7 Sensors

49.7.1 Usage

The sensor table defines each sensor on a sensor card. An entry is required for each sensor on the card that will be used.

49.7.2 Summary page

The summary page provides a listing of sensors (Figure 49.14). Click the name field in the row of interest to edit.

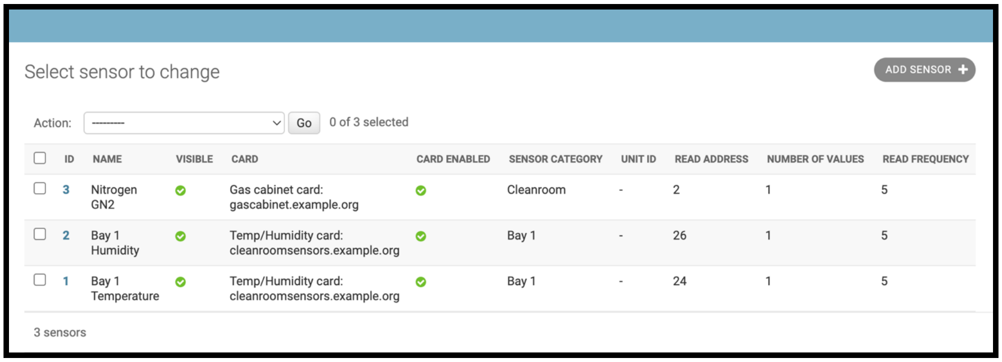


Figure 49.14: *Sensors summary page*

49.7.3 Fields

The add/change page for this table lists the fields that can be edited (Figure 49.15, Figure 49.16).

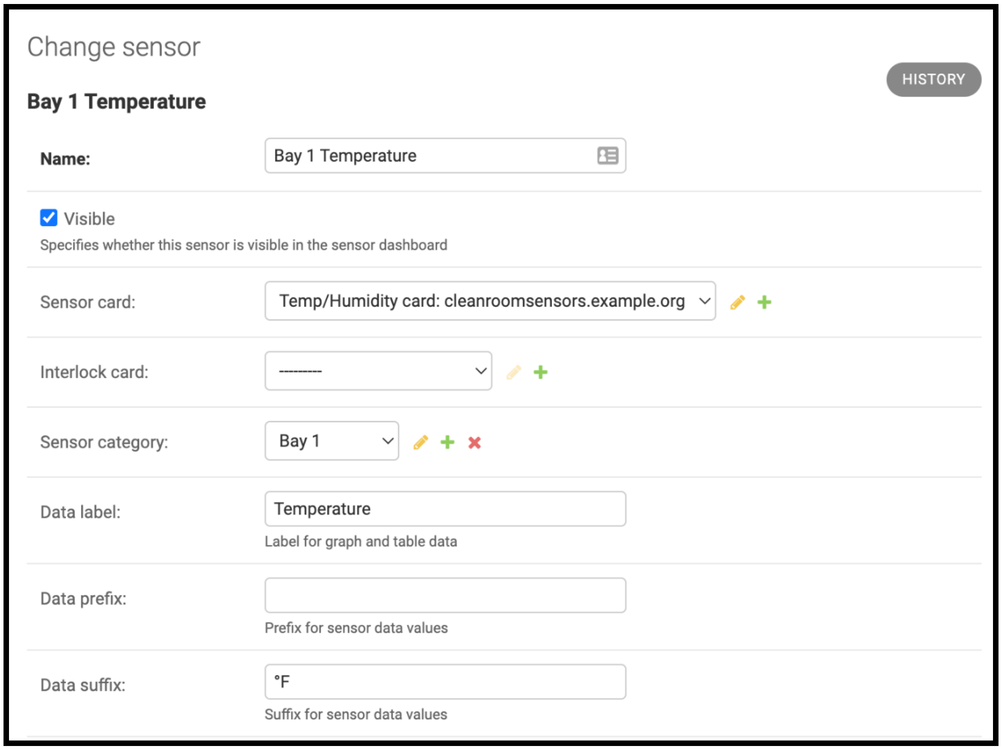


Figure 49.15: *Sensor fields*

- Name – text field of the sensor name (required).
- Visible – checkbox of whether this sensor should be visible in the sensor dashboard page.
- Sensor card – sensor card this sensor is connected too.
- Interlock card – interlock card this sensor is connected too. This allows for certain sensors to be connected to an interlock card, provided the

interlock card category key is the same as the one corresponding to the sensor class. For example, a ModbusTCP interlock card is compatible with the ModbusTCP sensor implementation. Certain manufacturers provide interlock boxes allowing for relays and sensor connection on the same device.

- Sensor category – the sensor category for this sensor.
- Data label – text field for the label to show on the Y axis of the chart data for this sensor.
- Data prefix – text field for the prefix to add to the value read. Only used when displaying the data.
- Data suffix – text field for the suffix to add to the value read. Only used when displaying the data.

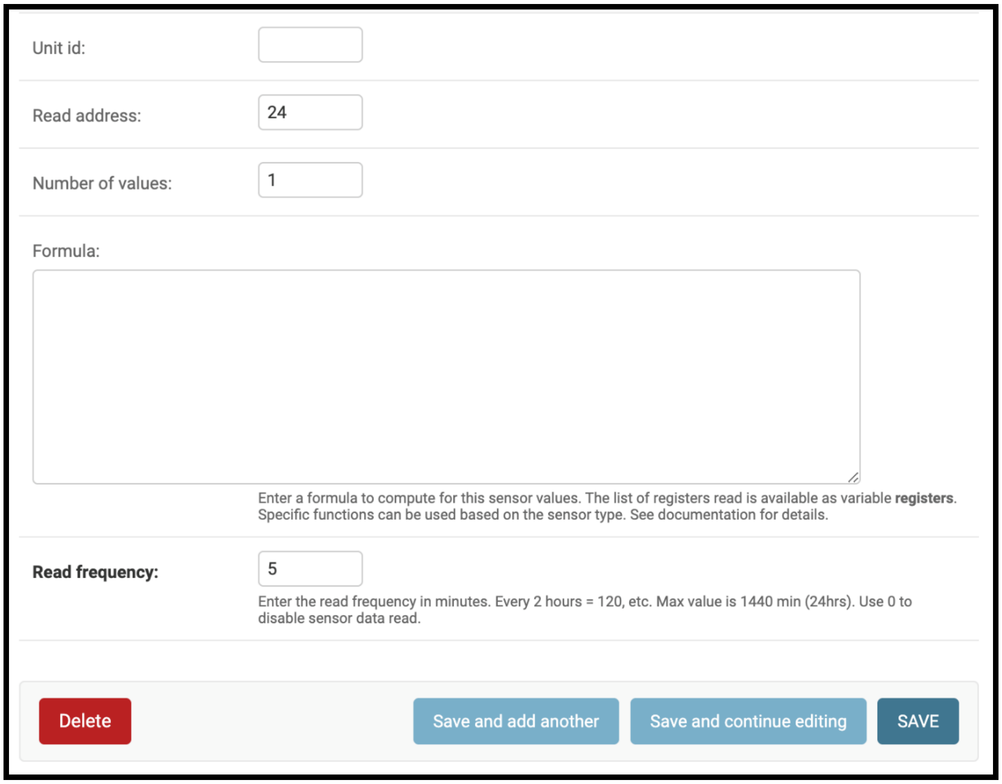


Figure 49.16: *Sensor fields continued*

- Unit id – number field for the unit id of the sensor. Usually left empty.
- Read address – number field for the address to start reading data from (required for ModbusTCP sensors). Refer to your sensor manual to find this value.
- Number of values – number of values to read (required for ModbusTCP sensors). Refer to your sensor manual to find this value. If greater than 1, the formula field will be required.
- Formula – the formula to apply when reading the values. The values are available as a list “registers”. For example, “round(registers[0], 2)” to round the value to the nearest 2 decimal value. Some sensor ModbusTCP

devices split data into multiple registers, and they need to be decoded together. The following modbus-specific functions are available:

- decode_8bit_uint
- decode_16bit_uint
- decode_32bit_uint
- decode_64bit_uint
- decode_8bit_int
- decode_16bit_int
- decode_32bit_int
- decode_64bit_int
- decode_16bit_float
- decode_32bit_float
- decode_64bit_float
- decode_bits
- decode_string
- read_coils

For example, “decode_32bit_float(registers)” would decode a 32 bit float from a register list containing 2 values, while “read_coils(1)” will read the value for coil #1. Refer to your sensor manual for details.

49.7.4 User access page

There is no user access page to create sensors. However, sensors are discussed in the Sensor data chapter 47.

CHAPTER 50

Dynamic Form fields

Dynamic forms in NEMO are used for pre/post tool usage questions, Reservation questions and Custom form templates. This chapter describes the options available for dynamic form fields.

Dynamic form fields are defined with a json formatted list in detailed administration. Some fields like number fields can trigger consumable purchases when used in tool pre/post usage questions. The json script is validated when saving the record and error messages indicating format or missing required fields will be displayed. Responses to dynamic field questions are stored in a data field of the usage events/reservation table as json formatted data. Questions can be configured so responses are either required or optional. In addition, questions can be grouped and repeated a configurable number of times to capture multiple responses to the same questions (Figure 50.1).

Chapter 50 Dynamic Form fields

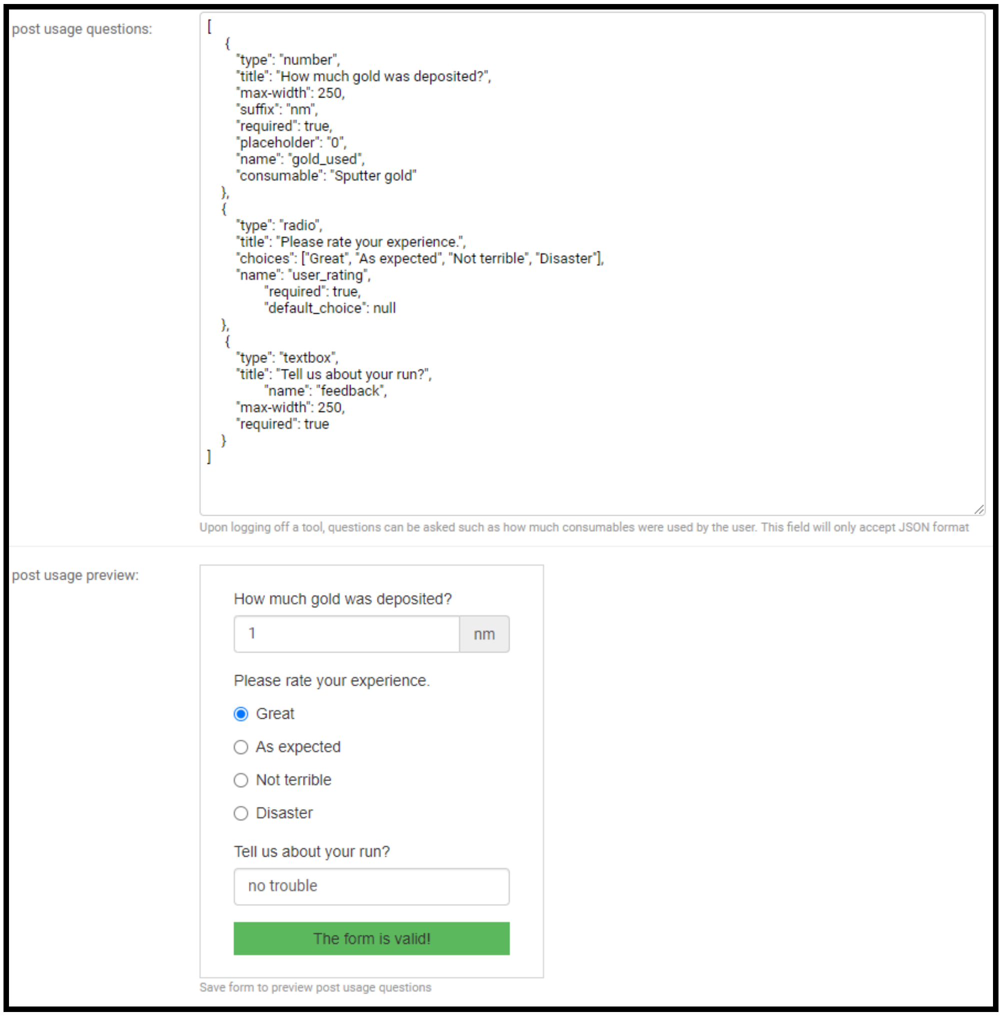


Figure 50.1: *Dynamic form fields*

50.1 Radio button

Radio button fields are used to ask the user to pick between multiple options (Figure 50.2).

```
[
    {
        "type": "radio",
        "title": "Please rate your experience.",
        "choices": ["Great", "As expected", "not
            terrible", "Disastrous"],
        "max-width": 250,
        "required": true,
        "name": "user_rating"
    }
]
```

Figure 50.2: *Dynamic form field radio button example*

- **“type”**: “radio”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“choices”**: list of choices [‘choice1’, ‘choice2’].
- “labels”: list of labels matching choices [‘choiceLabel1’, ‘choiceLabel2’].
- **“required”**: whether the question is required, true or false.
- “default_value”: the question default choice if any.
- “title_html”: html code to display instead of title.
- “inline”: whether the options should be displayed vertically (default) or inline.
- “help”: the question help text.

50.2 Radio button report problem

Radio button report problem field are used to automatically report a tool problem when the user answers yes (Figure 50.3).

```
[
    {
        "type": "radio_report_problem",
        "title": "Does the drain system display a
            'drain tank full' alert?",
        "max-width": 250,
        "required": true,
        "name": "drain_tank_full",
        "options": {
            "problem_description": "Drain tank full"
        }
    }
]
```

Figure 50.3: *Dynamic form field radio button report problem example*

- **“type”**: “radio_report_problem”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“required”**: whether the question is required, true or false.
- **"options"**: dictionary of task properties:
  - **"problem_description"**: the description to be set in the problem report
  - "force_shutdown": true/false, whether the tool needs to be shutdown
  - "safety_hazard": true/false, whether the problem represents a safety hazard
- “labels”: list of labels matching choices. Defaults to [‘Yes’, ‘No’].
- “default_value”: the question default choice if any.

- “title_html”: html code to display instead of title.
- “inline”: whether the options should be displayed vertically (default) or inline.
- “help”: the question help text.

50.3 Checkbox

Checkbox fields are used to ask user for one or more choices (Figure 50.4).

```
[
    {
        "type": "checkbox",
        "title_html": "Which type of slurry did you
            use?<br>(select all that apply)",
          "title": "Which slurry did you use?",
        "max-width": 250,
        "required": true,
        "choices": ["SS25E", "6103", "220A", "A7100"],
        "name": "slurry_used"
    }
]
```

Figure 50.4: *Dynamic form field checkbox example*

- **“type”**: “checkbox”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“choices”**: list of choices [‘choice1’, ‘choice2’].
- “labels”: list of labels matching choices [‘choiceLabel1’, ‘choiceLabel2’].
- **“required”**: whether the question is required, true or false.
- “default_value”: the question default choice if any.
- “title_html”: html code to display instead of title.
- “inline”: whether the options should be displayed vertically (default) or inline.
- “help”: the question help text.

50.4 Text box

Textbox fields are used to ask the user for a any kind of text (Figure 50.5).

```
[
    {
        "type": "textbox",
        "title": "How did your run go?",
        "max-width": 250,
        "required": true,
        "name": "feedback"
    }
]
```

Figure 50.5: *Dynamic form field textbox example*

- **“type”**: ”textbox”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“max-width”**: max width of the input in px.
- **“required”**: whether the question is required, true or false.
- “default_value”: the question default value if any.
- “title_html”: html code to display instead of title.
- “help”: the question help text.
- “maxlength”: the maximum allowed characters in the input.
- “pattern”: input field pattern validation. The pattern is a regular HTML attribute that accepts regular expressions. More info and examples can be found here: https://www.w3schools.com/tags/att_input_pattern.asp.
- “placeholder”: input field placeholder.

- “prefix”: prefix inside input field.
- “suffix”: suffix inside input field.

50.5 Text area

Textarea fields are used to ask the user for a potentially long text (Figure 50.6).

```
[
    {
        "type": "textarea",
        "title": "Comments",
        "placeholder": "Enter a comment",
        "max-width": 250,
        "required": true,
        "rows": 5,
        "name": "comments"
    }
]
```

Figure 50.6: *Dynamic form field textarea example*

- **“type”**: ”textarea”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“max-width”**: max width of the input in px.
- **“required”**: whether the question is required, true or false.
- “default_value”: the question default value if any.
- “title_html”: html code to display instead of title.
- “help”: the question help text.
- “rows”: number of rows to display. Default is 2.
- “pattern”: input field pattern validation. The pattern is a regular HTML attribute that accepts regular expressions. More info and examples can be found here: https://www.w3schools.com/tags/att_input_pattern.asp.

- “placeholder”: input field placeholder.
- “prefix”: prefix inside input field.
- “suffix”: suffix inside input field.

50.6 Integer number

Numeric fields are used to ask the user for an integer number (Figure 50.7).

```
[
    {
        "type": "number",
        "title": "How much gold was deposited?",
        "placeholder": "0",
        "suffix": "nm",
        "max-width": 250,
        "required": true,
        "min": 0,
        "max": 1000,
        "name": "gold_used",
        "consumable": "Sputter gold"
    }
]
```

Figure 50.7: *Dynamic form field number example*

- **“type”**: “number”.
- **“title”**: title of the question (label).
- **“name”**: name of the question for submit (unique).
- **“max-width”**: max width of the input in px.
- **“required”**: whether the question is required. True or false.
- “default_value”: the question default value if any.
- “title_html”: html code to display instead of title.
- “help”: the question help text.
- “placeholder”: input field placeholder.
- “prefix”: prefix inside input field.
- “suffix”: suffix inside input field.

- “min”: minimum number.
- “max”: maximum number.
- “step”: step number.
- “consumable_id”: id of the supply. This id must correspond to a valid entry in the consumables table, or an error will be triggered on saving. A consumable charge record will be created in the consumable withdraws table for the supply listed for the quantity entered. Consumables are detailed in the Detailed administration → Consumables table, see section 43.19.
- “consumable” (deprecated): supply name. use consumable_id instead.

50.7 Float number

Float fields are used to ask the user for a floating point number (Figure 50.8).

```
[
    {
        "type": "float",
        "title": "How long did you you etch?",
        "placeholder": "0",
        "suffix": "minutes",
        "max-width": 250,
        "required": true,
        "name": "etch_time"
    }
]
```

Figure 50.8: *Dynamic form field float example*

- **"type"**: "float".
- **"title"**: title of the question (label).
- **"name"**: name of the question for submit (unique).
- **"max-width"**: max width of the input in px.
- **"required"**: whether the question is required. True or false.
- "default_value": the question default value if any.
- "title_html": html code to display instead of title.
- "help": the question help text.
- "precision": precision of the float number (default is 2).
- "placeholder": input field placeholder.
- "prefix": prefix inside input field.
- "suffix": suffix inside input field.

50.8 Dropdown

Dropdown fields are used to offer the user a list of options (Figure 50.9).

```
[
    {
        "type": "dropdown",
        "title": "What material did you you etch?",
        "placeholder": "Pick one",
        "choices": ["Silicon oxide", "Silicon
           nitride"],
        "max-width": 250,
        "required": true,
        "name": "etch_material"
    }
]
```

Figure 50.9: *Dynamic form field dropdown example*

- **"type"**: "dropdown".
- **"title"**: title of the question (label).
- **"name"**: name of the question for submit (unique).
- **"max-width"**: max width of the input in px.
- **"required"**: whether the question is required. true or false.
- **"choices"**: list of choices (For example ["choice 1", "choice 2"]).
- "labels": list of labels matching choices ['choiceLabel1', 'choiceLabel2']. Categories can be enabled using a dictionary { 'Oxide': ['Silicon oxide'], 'Silicon': ['Silicon nitride'] }.
- **"placeholder"**: input field placeholder, e.g. "Pick one".
- "default_value": the question default choice if any.
- "title_html": html code to display instead of title.
- "help": the question help text.

50.9 Group

Group fields allow the creation of a group of questions that can be repeated. For example, when a user uses multiple processes on a tool, and we want to collect information about each one (Figure 50.10).

```
[
    {
        "type": "group",
        "title": "Tell us about the work you performed
            today.\nClick add to enter up to 3 processes",
        "name": "group1",
        "max_number": 3,
        "group_add_button_name": "Add another process",
        "questions": [
            {
                "type": "dropdown",
                "title": "What material did you you etch?\n:",
                "placeholder": "Pick one",
                "choices": ["Silicon oxide", "Silicon nitride"],
                "max-width": 250,
                "required": true,
                "name": "etch_material"
            },
            {
                "type": "number",
                "precision": 3,
                "title": "How long did you etch?",
                "max-width": 250,
                "suffix": "minutes",
                "required": true,
                "placeholder": "0",
                "name": "etch_time"
            },
            {
                "type": "textbox",
                "title": "Additional Notes",
                "max-width": 500,
                "required": false,
                "name": "etch_notes"
            }
        ]
    }
]
```

Figure 50.10: *Dynamic form preview groups example json*

- **"type"**: "group".
- **"title"**: title of the group (label), use "\n" to force line breaks.
- **"name"**: name of the group for submit (unique).
- **"max-number"**: maximum number of times the group of inputs can be repeated.
- **"questions"**: list of questions, enclosed in brackets, to group together.
- "title_html": html code to display instead of title.
- "group_add_button_name": name of "Add" button to display.

50.10 Formula

Formula fields allow to do basic math and data manipulation with the results of other questions. For example, one could ask the user for how much they used a consumable in different units and convert them, or use it on a group to sum the total use of a consumable for each of the processes the user ran. (Figure 50.11).

```
[
    {
        "type": "group",
        "title": "Tell us about the work you performed today.\n",
        "name": "group1",
        "max_number": 3,
        "group_add_button_name": "Add another process",
        "questions": [
            {
                "type": "number",
                "precision": 5,
                "title": "How much gold was deposited (nl)?",
                "max-width": 250,
                "suffix": "nl",
                "required": true,
                "placeholder": "0",
                "name": "gold_used_nl"
            },
            {
                "type": "number",
                "precision": 5,
                "title": "How much gold was deposited (ul)?",
                "max-width": 250,
                "suffix": "ul",
                "required": true,
                "placeholder": "0",
                "name": "gold_used_ul"
            }
        ]
    },
    {
        "type": "formula",
        "title": "Total gold used",
        "max-width": 250,
        "formula": "sum(gold_used_nl) + sum(gold_used_ul)*1000",
        "name": "gold_used",
        "consumable": "Sputter gold"
    }
]
```

Figure 50.11: *Dynamic form field formula example*

- **“type”**: “formula”.
- **“title”**: title of the formula (label), use “\n” to force line breaks.
- **“name”**: name of the formula for submit (unique).
- **“formula”**: actual formula to execute. The other question names are used to identify them. If using a question_name that is within a group and the formula is located within the same group, the question_name will refer to the value of the question within the same group item. If the formula is located outside of the group, the question_name variable will refer to the list of values the user entered for all group items. Other formula results can also be used within a formula.
- “consumable_id”: id of the supply. This id must correspond to a valid entry in the consumables table, or an error will be triggered on saving. A consumable charge record will be created in the consumable withdraws table for the supply listed for the quantity entered. Consumables are detailed in the Detailed administration → Consumables table, see section 43.19.
- “consumable” (deprecated): supply name. use consumable_id instead.

50.11 Dynamic form grid

Each dynamic form field can be organized into a grid by using the “form_row” and “row_cell” properties. All the fields with the same “form_row” number will be grouped in the same row and all the rows will be displayed by ascending “form_row” number. If no “form_row” property is present, all the fields will be displayed vertically in the order they were declared.

Within the same row number, fields will be displayed by ascending “row_cell” number if present. If no “row_cell” property is present, fields will be displayed in the order they were declared.

The “max-width” will be respected but if it’s not present, the field will take the full width divided by the number of field in the row. For example, if there are 3 fields on row 1, each field will take 33.33% of the width.

The following is a json example with 3 rows of 2 fields each (Figure 50.12) and the rendered form (Figure 50.13).

```json
[
    {
        "form_row": 1,
        "type": "number",
        "title": "How much NX88 slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "NX88",
        "consumable": "NX88 (ml)"
    },
    {
        "form_row": 1,
        "type": "number",
        "title": "How much SS25E slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "SS25E",
        "consumable": "SS25E (mL)"
    },
    {
        "form_row": 2,
        "type": "number",
        "title": "How much 6103 slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "6103",
        "consumable": "6103 (mL)"
    },
    {
        "form_row": 2,
        "type": "number",
        "title": "How much 556 slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "556",
        "consumable": "556 (mL)"
    },
    {
        "form_row": 3,
        "type": "number",
        "title": "How much 220A slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "220A",
        "consumable": "220A (mL)"
    },
    {
        "form_row": 3,
        "type": "number",
        "title": "How much A7100 slurry was used?",
        "max-width": 275,
        "suffix": "mL",
        "required": true,
        "default_choice": null,
        "placeholder": "0",
        "name": "A7100",
        "consumable": "A7100 (mL)"
    }
]
```


Figure 50.12: *Dynamic form grid json*

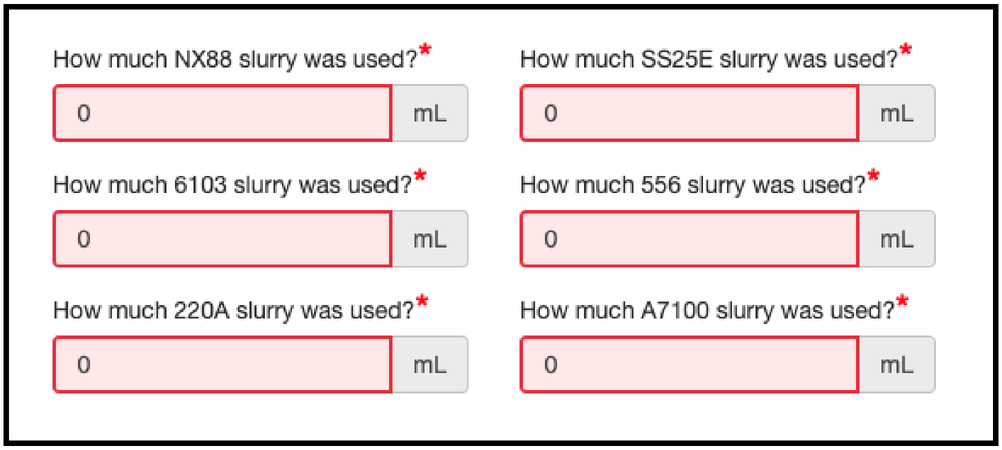


Figure 50.13: *Dynamic form grid rendered*

50.12 Dynamic form preview

After saving the dynamic form record with json information, the dynamic form preview will display what users will see (Figure 50.14). This feature is useful for verifying the json input is correct and previewing the output. If there are errors in the json script, they will be indicated and suggestions to fix the issue will be given. The preview will show not valid if the required fields are not entered or in the specified range.

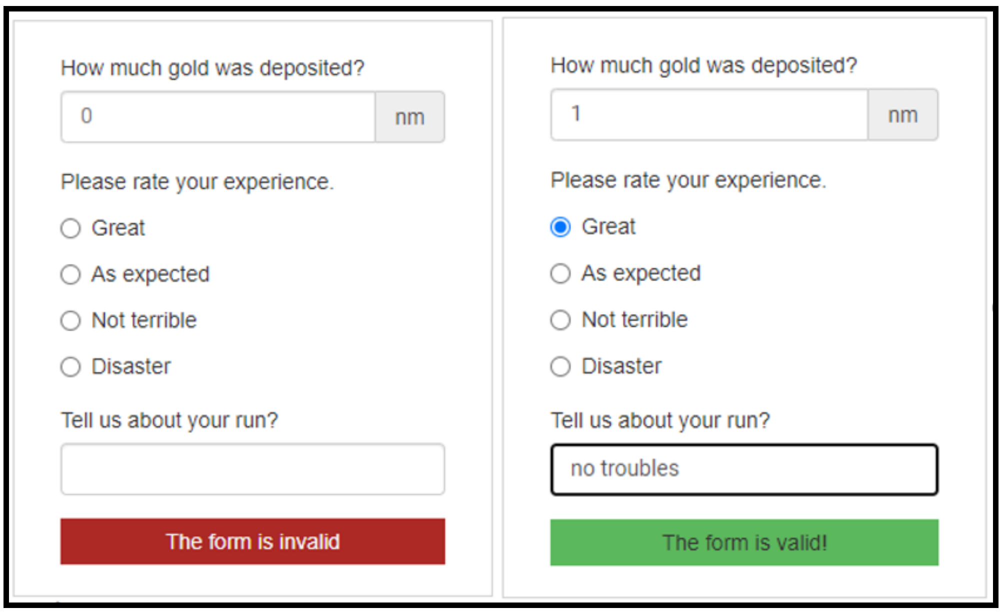


Figure 50.14: *Dynamic form preview*

Dynamic form preview – example of groups

- Using this json code example (Figure 50.15)

```
[
    {
        "type": "group",
        "title": "Tell us about the work you performed\nClick add to
            enter up to 3 processes",
        "name": "group1",
        "max_number": 3,
        "questions": [
            {
                "type": "dropdown",
                "title": "What material did you you etch?",
                "placeholder": "Pick one",
                "choices": ["Silicon oxide", "Silicon nitride"],
                "max-width": 250,
                "required": true,
                "name": "etch_material"
            },
            {
                "type": "number",
                "precision": 3,
                "title": "How long did you etch?",
                "max-width": 250,
                "suffix": "minutes",
                "required": true,
                "placeholder": "0",
                "name": "etch_time"
            }
        ]
    }
]
```

Figure 50.15: *Dynamic form preview groups example json*

- Results in the initial display (Figure 50.16)

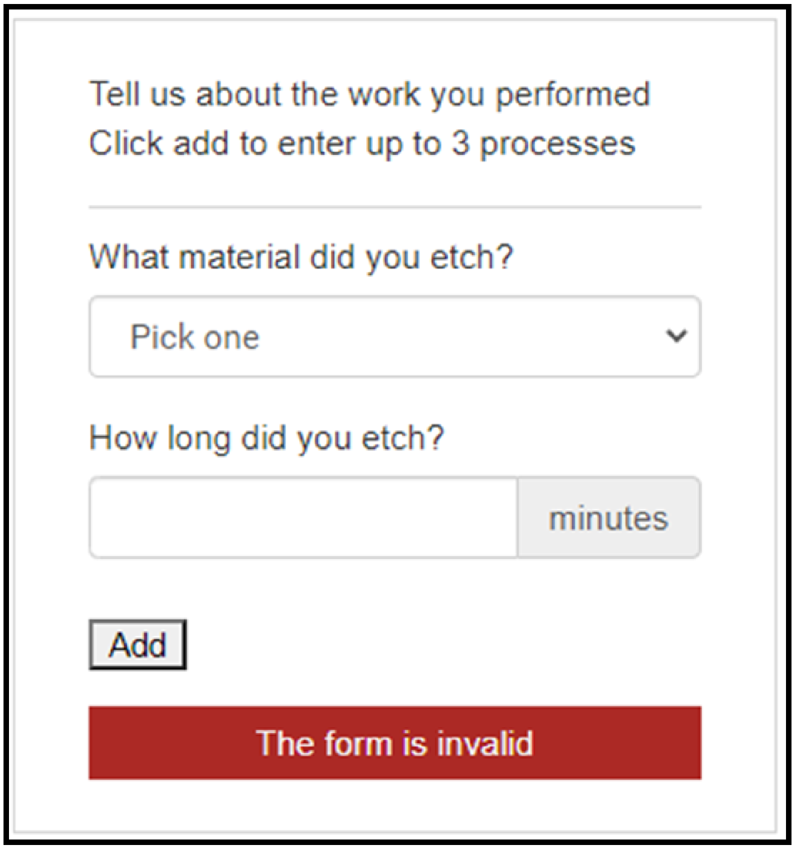


Figure 50.16: *Dynamic form fields groups initial*

- Entering required information makes the form valid (Figure 50.17)

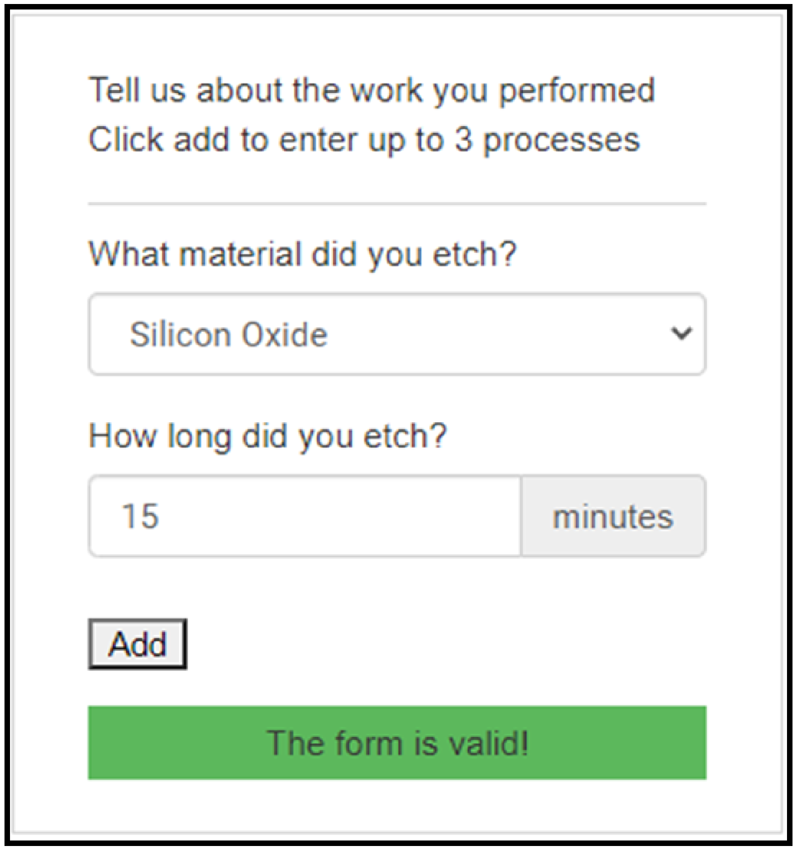


Figure 50.17: *Dynamic form fields groups validated*

- Clicking add will create another group of questions and make the form invalid again until required information is entered (Figure 50.18). Click remove to remove added groups if needed.

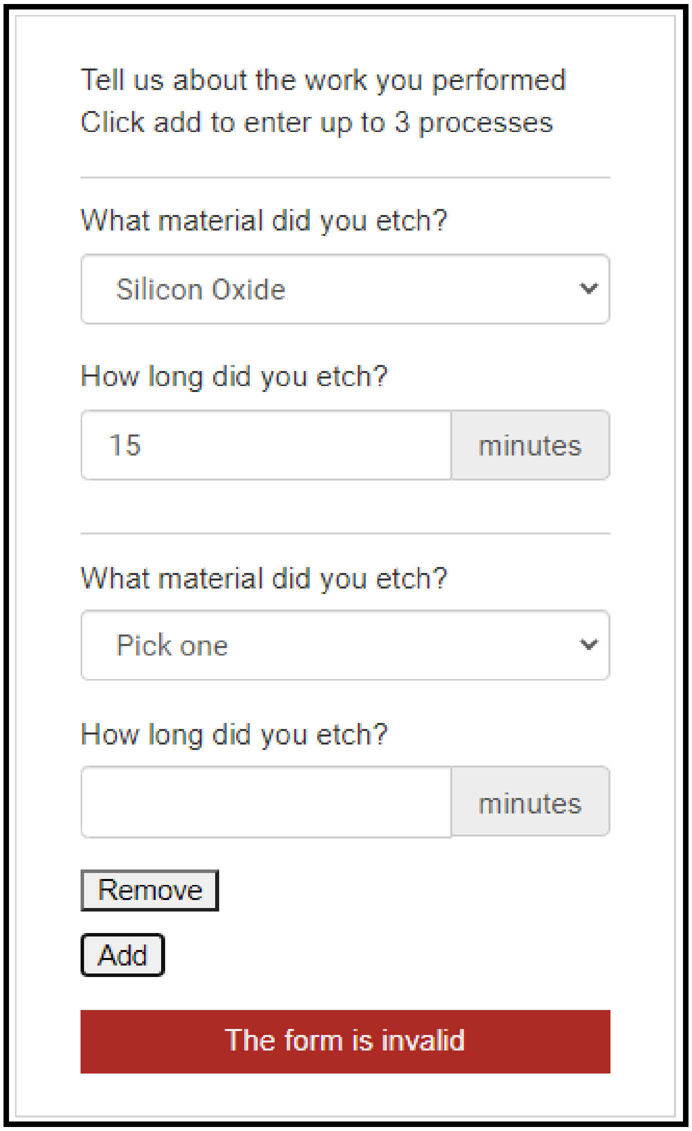


Figure 50.18: *Dynamic form fields groups add/remove*

- Once the maximum number of groups is added, the add button will disappear (Figure 50.19). Unneeded groups can be removed by clicking the remove button. Removals do not need to be done in sequence.

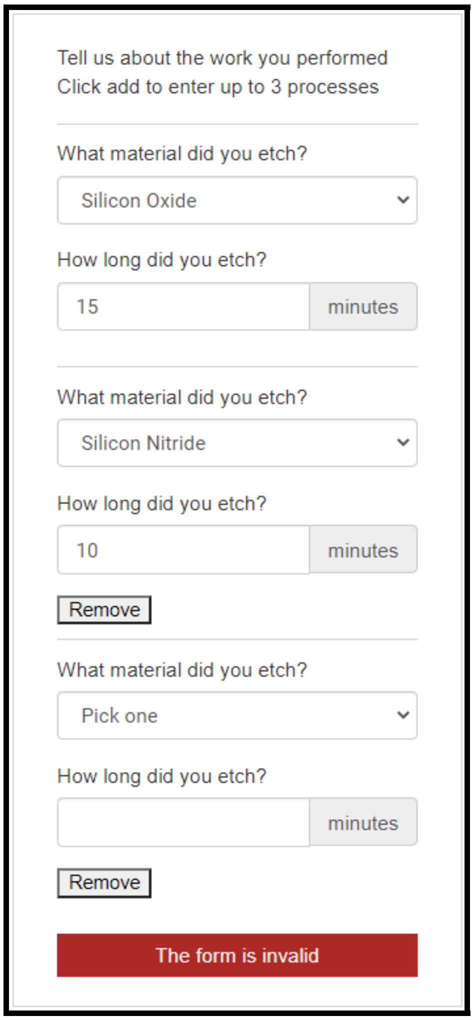


Figure 50.19: *Dynamic form fields groups maximum*

CHAPTER 51

API access

51.1 Usage

- The API base access page is accessible in the Administration menu under API. A list of available data tables will be displayed (Figure 51.1).
- Several tables are available through the API
  - metadata: “site-address/api/metadata/”,
  - account_types: “site-address/api/account_types/”,
  - accounts: “site-address/api/accounts/”,
  - adjustment_requests: “site-address/api/adjustment_requests/”,
  - alert_categories: “site-address/api/alert_categories/”,
  - alerts: “site-address/api/alerts/”,
  - area_access_records: “site-address/api/area_access_records/”,

- areas: “site-address/api/areas/”,
- auth_groups: “site-address/api/auth_groups/”,
- auth_permissions: “site-address/api/auth_permissions/”,
- billing: “site-address/api/billing/”,
  * The billing information is discussed in a separate part later in this section.
- buddy_requests: “site-address/api/buddy_requests/”,
- configurations: “site-address/api/configurations/”,
- consumable_categories: “site-address/api/consumable_categories/”,
- consumable_withdrawals: “site-address/api/consumable_withdrawals/”,
- consumables: “site-address/api/consumables/”,
- content_types: “site-address/api/content_types/”,
- interlock_card_categories: “site-address/api/interlock_card_categories/”,
- interlock_cards: “site-address/api/interlock_cards/”,
- interlocks: “site-address/api/interlocks/”,
- physical_access_levels: “site-address/api/physical_access_levels/”,
- project_disciplines: “site-address/api/project_disciplines/”,
- project_types: “site-address/api/project_types/”,
- projects: “site-address/api/projects/”,
- qualifications: “site-address/api/qualifications/”,
- recurring_consumable_charges: “site-address/api/recurring_consumable_charges/”,
- reservation_configuration_options: “site-address/api/reservation_configuration_options/”,
- reservations: “site-address/api/reservations/”,
- resources: “site-address/api/resources/”,
- scheduled_outages: “site-address/api/scheduled_outages/”,

- staff_charges: “site-address/api/staff_charges/”,
- tasks: “site-address/api/tasks/”,
- temporary_physical_access_requests: “site-address/api/temporary_physical_access_reque
- tool_credentials: “site-address/api/tool_credentials/”,
- tool_status: “site-address/api/tool_status/”,
- tools: “site-address/api/tools/”,
- training_sessions: “site-address/api/training_sessions/”,
- usage_events: “site-address/api/usage_events/”,
- user_documents: “site-address/api/user_documents/”,
- users: “site-address/api/users/”

Chapter 51 API access

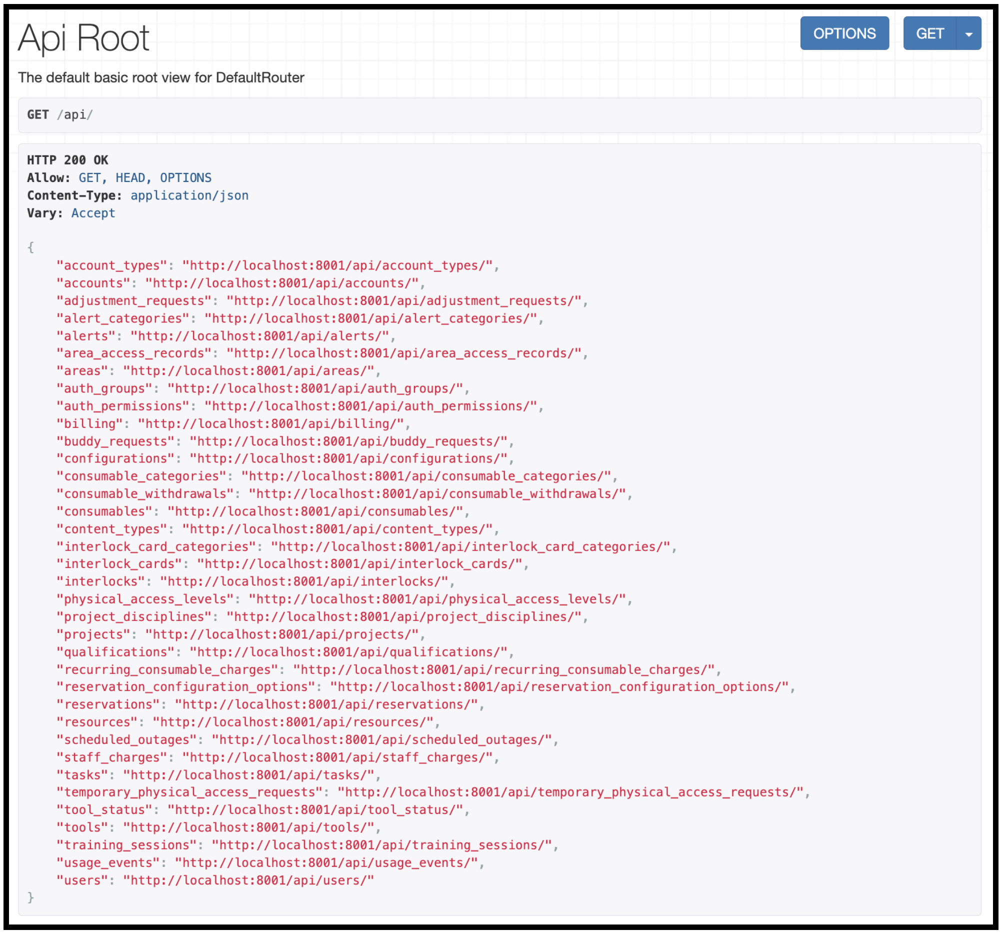


Figure 51.1: *API access root*

- Directly enter the web address or click on the address link of any table to access the data (Figure 51.2). The example below was reached with the address “site-address/api/users/”

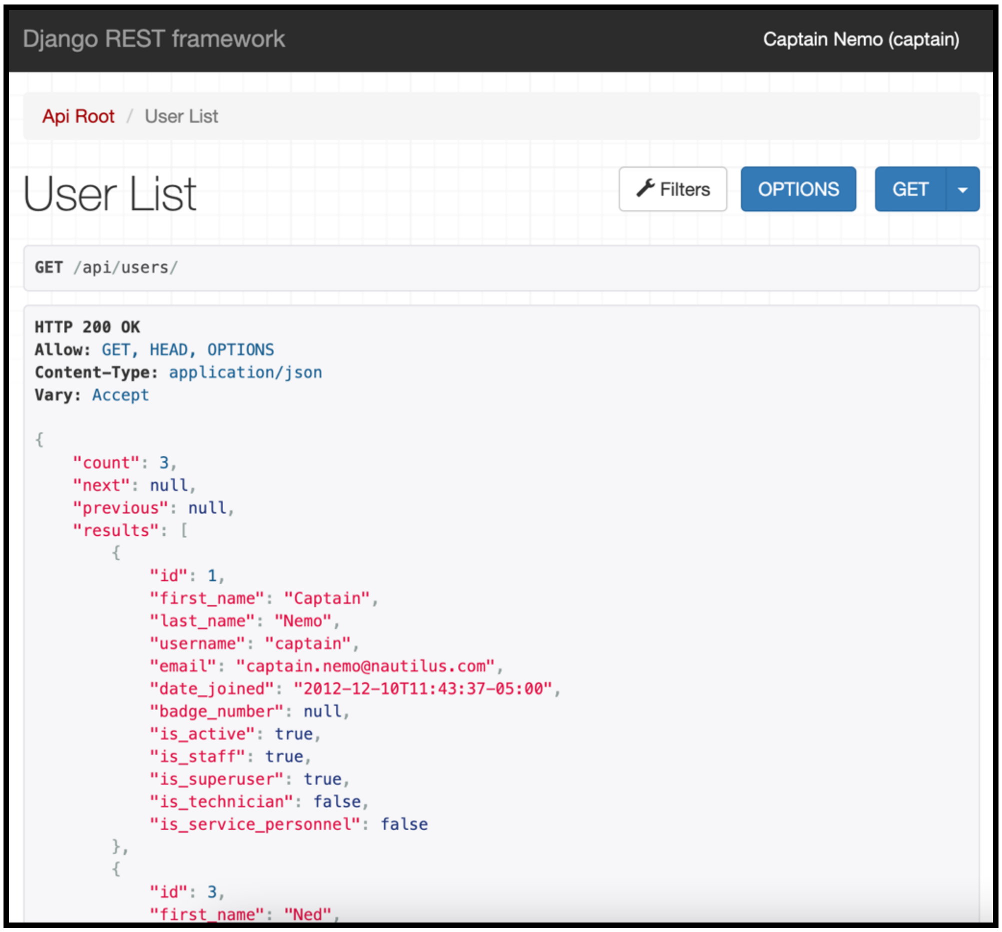


Figure 51.2: *API access example data list view*

- To remove all formatting and convert the data to a json output stream, add the parameter "format=json" or select the drop down in the top right corner then select json from the list (Figure 51.3).

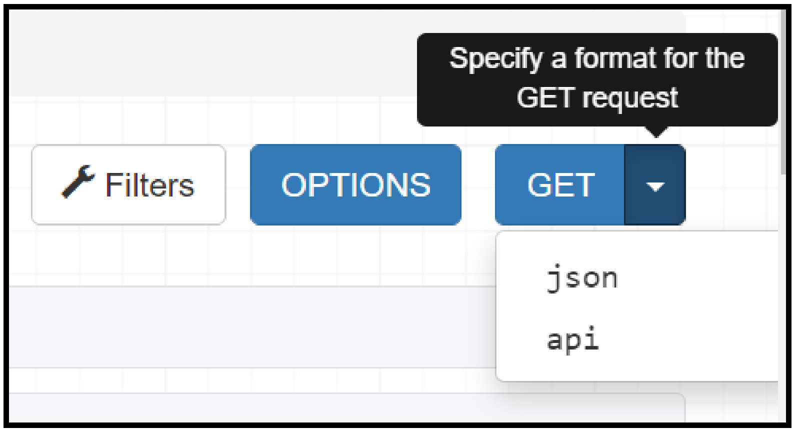


Figure 51.3: *API access change to json view*

- The page output will now be in json format which can be parsed in many external software packages for analysis or billing (Figure 51.4). The example below was reached with the address "site-address/api/users/?format=json"


```
{"count":3,"next":null,"previous":null,"results":
[{"id":1,"first_name":"Captain","last_name":"Nemo","username":"captain","email":"captain.nemo@nautilus.com"
,"date_joined":"2012-12-10T11:43:37-
05:00","badge_number":null,"is_active":true,"is_staff":true,"is_superuser":true,"is_technician":false,"is_s
ervice_personnel":false},
{"id":3,"first_name":"Ned","last_name":"Land","username":"ned","email":"ned.land@nautilus.com","date_joined
":"2012-12-10T11:49:38-
05:00","badge_number":null,"is_active":true,"is_staff":false,"is_superuser":false,"is_technician":false,"is
_service_personnel":false},
{"id":2,"first_name":"Pierre","last_name":"Aronnax","username":"professor","email":"pierre.aronnax@nautilus
.com","date_joined":"2012-12-10T11:48:43-
05:00","badge_number":null,"is_active":true,"is_staff":false,"is_superuser":false,"is_technician":false,"is
_service_personnel":false}]}
```


Figure 51.4: *API access example data json view*

51.2 Special parameters

The “expand” parameter can be used to request fully nested objects in the response. It can be used with an attribute, a comma separated attribute list or the wild card *.

For example, this is the view without expand. “site-address/api/projects/” (Figure 51.5)

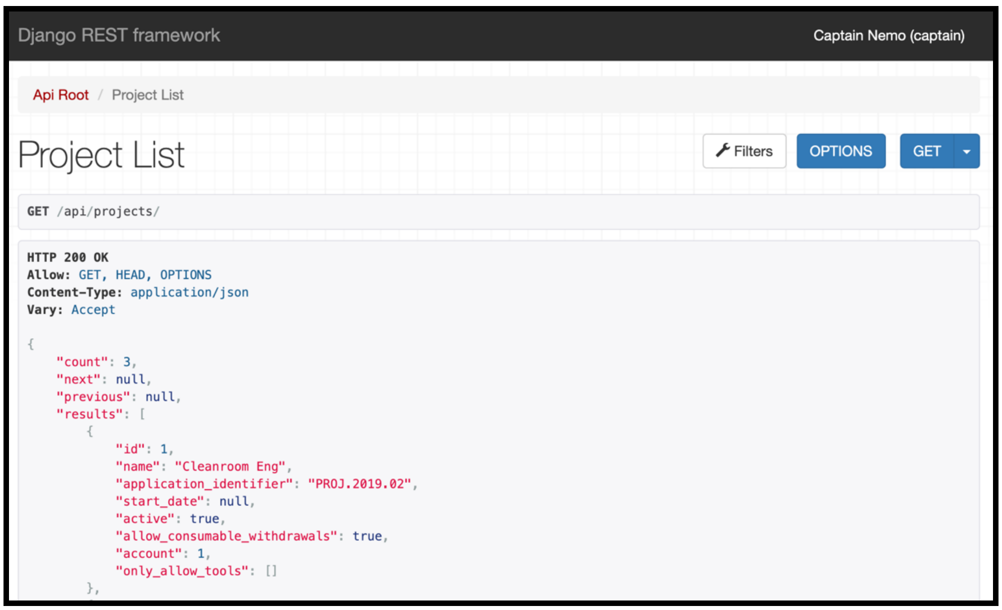


Figure 51.5: *API access example projects*

And this is an example with expand.
“http://localhost:8005/api/projects/?expand=account” (Figure 51.6)

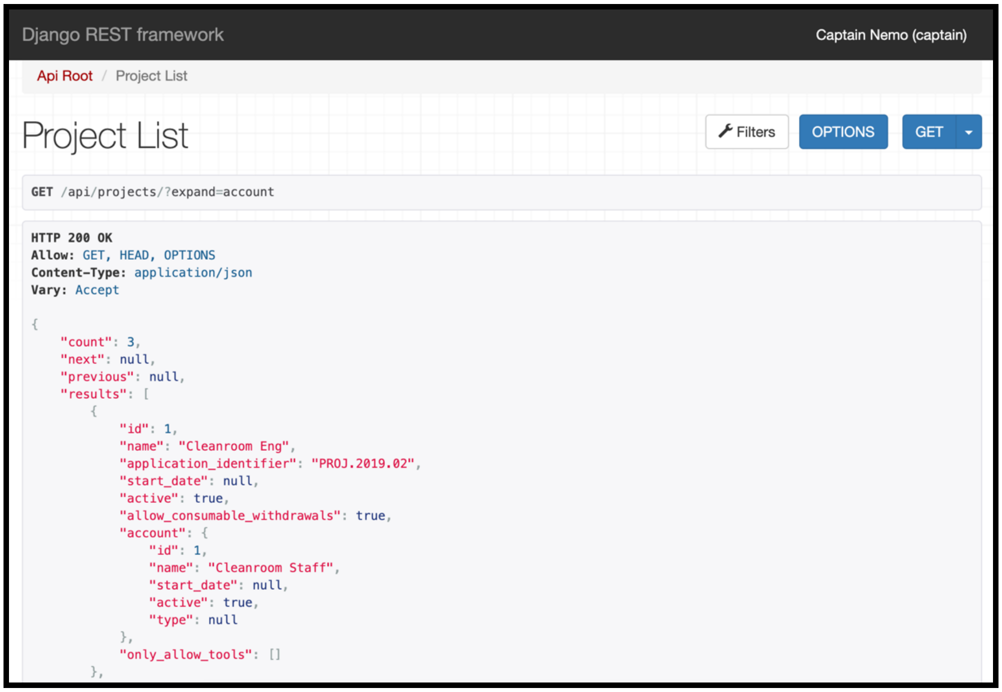


Figure 51.6: *API access example projects with expand*

The parameter “fields” can be used to select specific fields to be retrieved. For example “site-address/api/projects/?fields=name” will only retrieve the name of the projects (Figure 51.7)

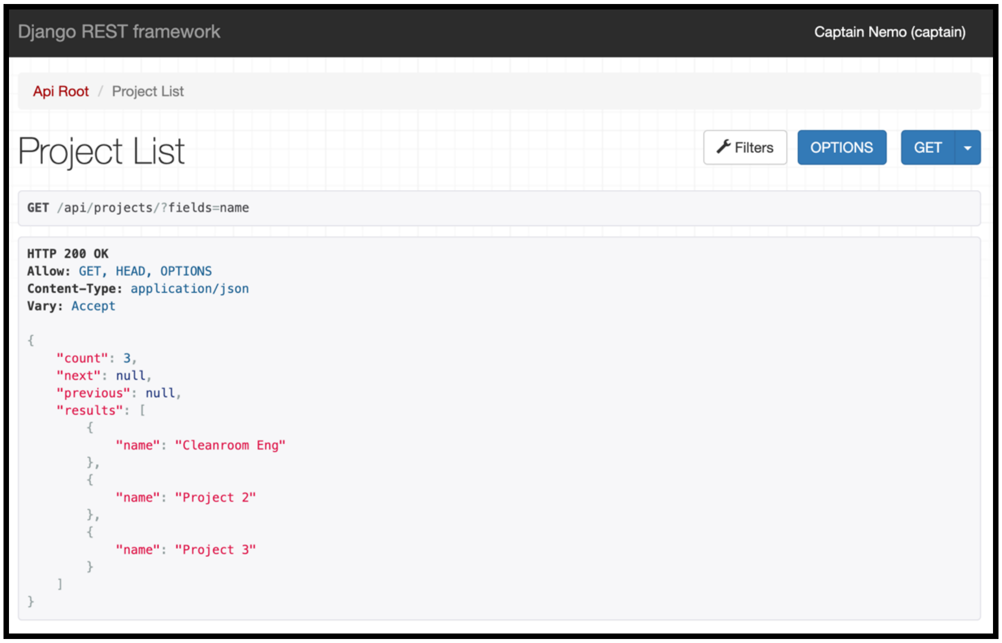


Figure 51.7: *API access example projects with fields*

Using the same syntax, "?omit=name" can be used to retrieve all fields except "name" (Figure 51.8)

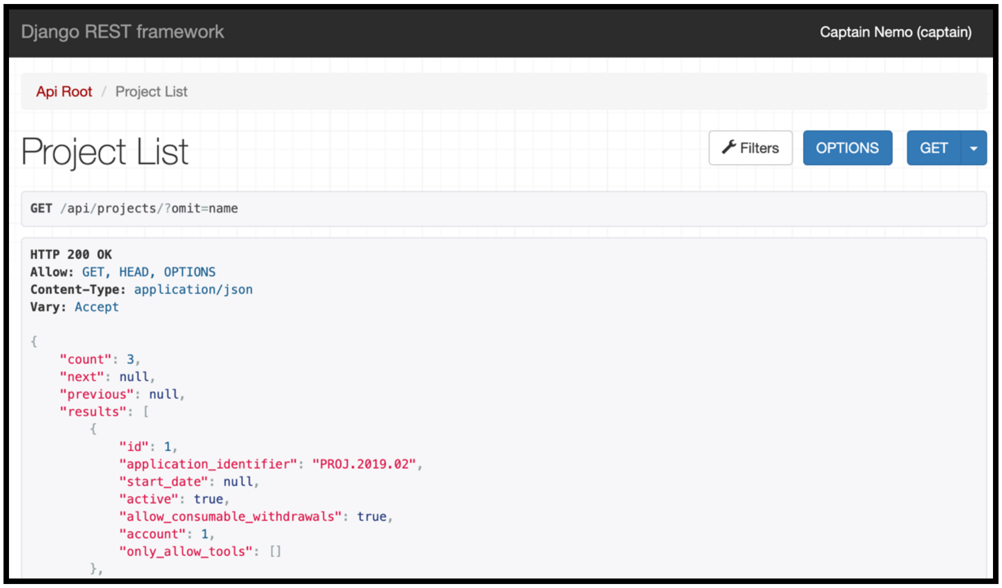


Figure 51.8: *API access example projects with omit*

51.3 Export formats

The API data can be exported in 2 different formats: JSON and XLSX. JSON export format is enabled out of the box, however the XLSX format is not. To enable XLSX format, the following setting must be used in the REST_FRAMEWORK section of the setting.py file: 'DEFAULT_RENDERER_CLASSES':
['rest_framework.renderers.JSONRenderer',
'rest_framework.renderers.BrowsableAPIRenderer',
'drf_renderer_xlsx.renderers.XLSXRenderer'],

51.4 Date/Time formats

The default date/time formats which are used to format date and times in the API can be set in the REST_FRAMEWORK section of the settings.py file, for example:
'DATETIME_FORMAT': '%m-%d-%Y %H:%M:%S',
'DATE_FORMAT': '%m-%d-%Y',
'TIME_FORMAT': '%H:%M:%S',

51.5 Access Errors

If an error is received, the user may not have permission to access the API interface (Figure 51.9). Users accessing the API must have either administrator status or have the "Can use billing API" permission.

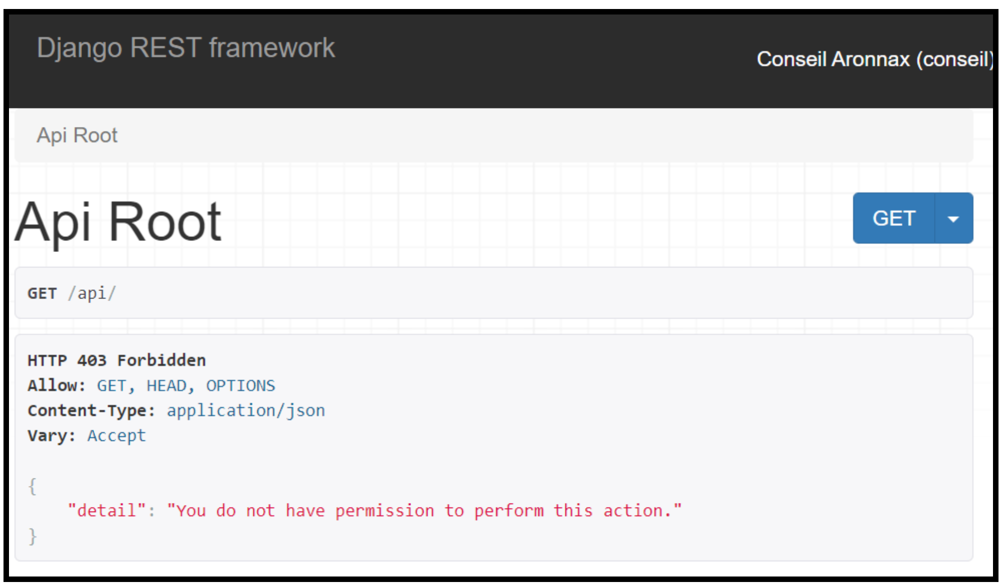


Figure 51.9: *API access permission error*

The authentication class must be set for the method you plan to access the API, or you will receive an error (Figure 51.10). To use token authentication which is the easiest way for a program to retrieve data, the following setting must be used in the REST_FRAMEWORK section of the setting.py: 'DEFAULT_AUTHENTICATION_CLASSES': ('rest_framework.authentication.TokenAuthentication',). Then, a token must be created for the user that will access the API. When token authentication is enabled, tokens can be created in the detailed administration tokens table.

To allow web address access, add ('rest_framework.authentication.SessionAuthentication') to the authentication class tuple.

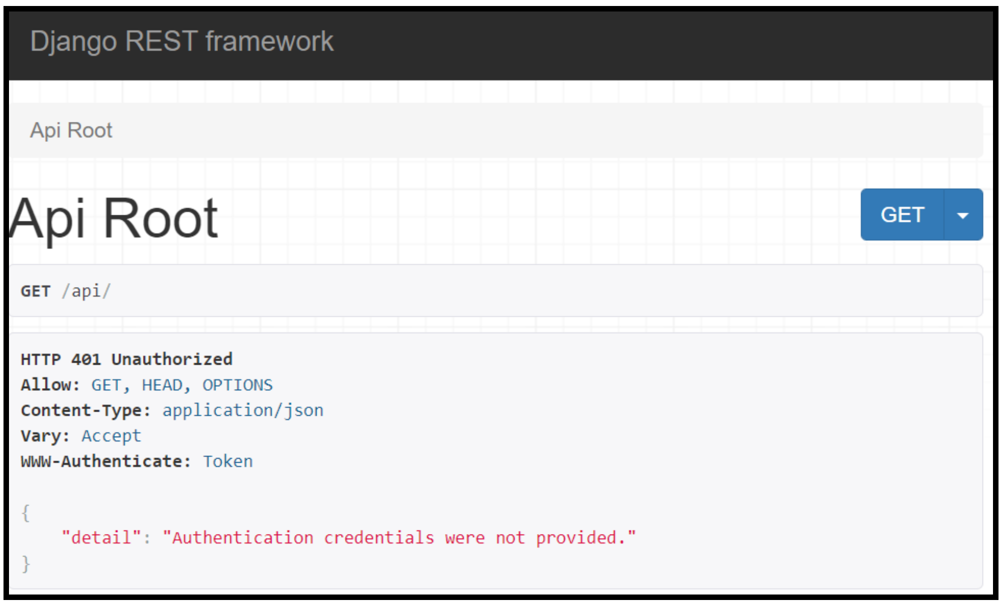


Figure 51.10: *API access authentication error*

51.6 Billing information

Billing information can be directly accessed in a date range through the billing API. The billing API requires a start date (start) and end date (end) to be passed as arguments.

Valid parameters are:

- **start** (required): date in format MM/DD/YYYY.
- **end** (required): date in format MM/DD/YYYY.
- **username**: username of a user to get billing for.
- **account_name**: name of the account to get billing for.
- **account_id**: id of the account to get billing for.
- **project_name**: name of the project to get billing for.
- **project_id**: id of the project to get billing for.
- NOTE: If valid start and end dates are not given, an error will be returned (Figure51.11).

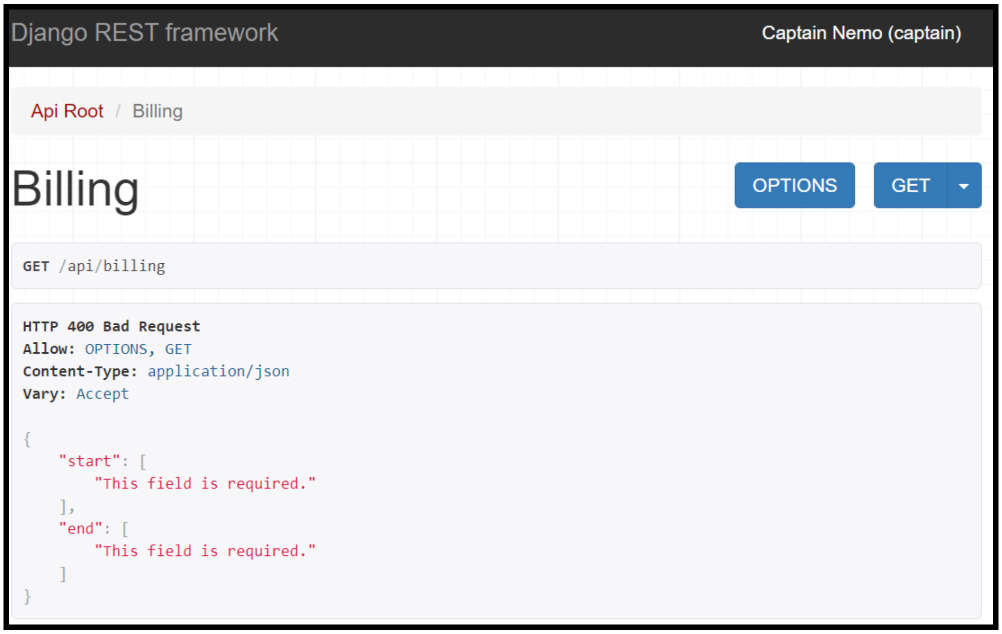


Figure 51.11: *API access billing date range error*

- The format for requesting billing information through the API is site-address/api/billing?start=1/1/2020&end=12/31/2020. This request will produce the output in Figure 51.12.

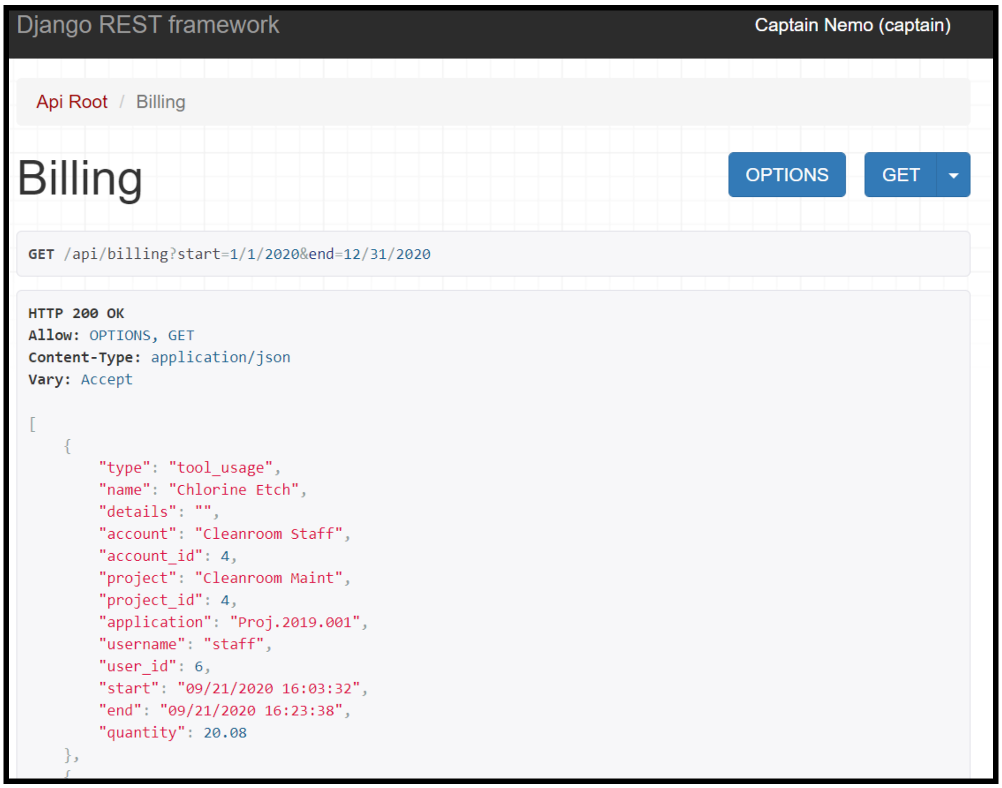


Figure 51.12: *API access example billing data list view*

- The format for requesting billing information as a json stream is the same as the other tables; site-address/api/billing?start=1/1/2020&end=12/31/2020&format=json. This request will produce the output in Figure 51.13.


```
[{"type":"tool_usage","name":"Chlorine Etch","details":"","account":"Cleanroom
Staff","account_id":4,"project":"Cleanroom
Maint","project_id":4,"application":"Proj.2019.001","username":"staff","user_id":6,"start":"09/21/2020
16:03:32","end":"09/21/2020 16:23:38","quantity":20.08},
{"type":"tool_usage","name":"Ellipsometer","details":"","account":"Account
1","account_id":1,"project":"Project
1","project_id":1,"application":"PROJ.123","username":"professor","user_id":2,"start":"09/21/2020
16:03:02","end":"09/21/2020 16:23:40","quantity":20.62},
{"type":"tool_usage","name":"Sputter","details":"","account":"Account 2","account_id":2,"project":"Project
2","project_id":2,"application":"PROJ.456","username":"ned","user_id":3,"start":"09/21/2020
16:02:39","end":"09/21/2020 16:23:43","quantity":21.07},
{"type":"tool_usage","name":"PECVD","details":"","account":"Cleanroom
Staff","account_id":4,"project":"Cleanroom
Maint","project_id":4,"application":"Proj.2019.001","username":"captain","user_id":1,"start":"09/21/2020
15:00:39","end":"09/21/2020 16:23:41","quantity":83.02},
{"type":"tool_usage","name":"PECVD","details":"","account":"Cleanroom
Staff","account_id":4,"project":"Cleanroom
Maint","project_id":4,"application":"Proj.2019.001","username":"captain","user_id":1,"start":"09/21/2020
11:54:07","end":"09/21/2020 15:00:33","quantity":186.42},{"type":"tool_usage","name":"PECVD","details":"Work
performed by Captain Nemo (captain) on your behalf","account":"Account 1","account_id":1,"project":"Project
1","project_id":1,"application":"PROJ.123","username":"ned","user_id":3,"start":"09/21/2020
11:52:45","end":"09/21/2020 11:53:03","quantity":0.28},
{"type":"tool_usage","name":"Sputter","details":"","account":"Cleanroom
Staff","account_id":4,"project":"Cleanroom
Eng","project_id":6,"application":"Proj.2019.002","username":"captain","user_id":1,"start":"06/08/2020
```


Figure 51.13: *API access example billing data json view*

CHAPTER 52

Kiosk

Kiosks provide a quick and convenient way for users to access tools and reservations. The kiosk can run on any device with web access but requires a card reader and NEMO user with permission to act as a kiosk.

52.1 Setup

To enable this feature, you need to have 'NEMO.apps.kiosk' in
INSTALLED_APPS in your settings.py.
The use of a kiosk tablet requires a tablet or computer configured to interface with NEMO and send the appropriate messages.

52.1.1 Kiosk user

A dedicated NEMO user should be setup for kiosk tablets. That user must have the following permissions which are set in the users table of the database:

- NEMO|user|Kiosk services

52.1.2 Card reader

The kiosk tablet uses a badge reader to identify the user. Usually, an identity card that users of the facility already have can be utilized, but there are also tokens that can be used. NEMO defaults to expecting the F2 character to start recording the badge number and another F2 character to end and submit the badge number similar to what is provided by a pcProx Plus card reader (Figure 52.1). NIST does not endorse this product but the information is provided as an example of the type of reader that can be used.

Figure 52.1: *Kiosk card reader example*

If your card reader uses different characters, a custom badge reader configuration can be setup in the badge reader table.

Once the card reader is setup, it can be tested by opening notepad or other computer text editor software then scan a badge. A serial number should be seen (Figure 52.2).

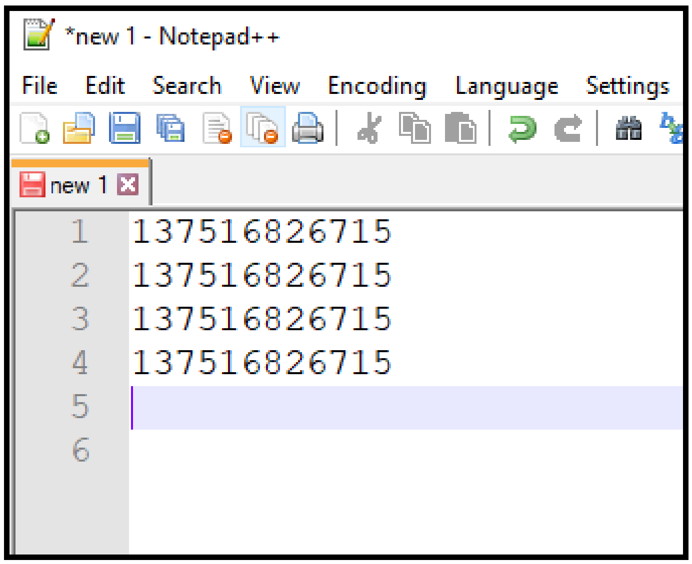


Figure 52.2: *Kiosk card reader test example*

52.1.3 User setup

Now that the card reader is setup, each user needs to have their badge number entered into their user profile. This is easily accomplished by setting up a card reader on a computer that has access to NEMO by a staff member. Then follow these steps:

- Navigate to the Administration → Users page (Figure 52.3)

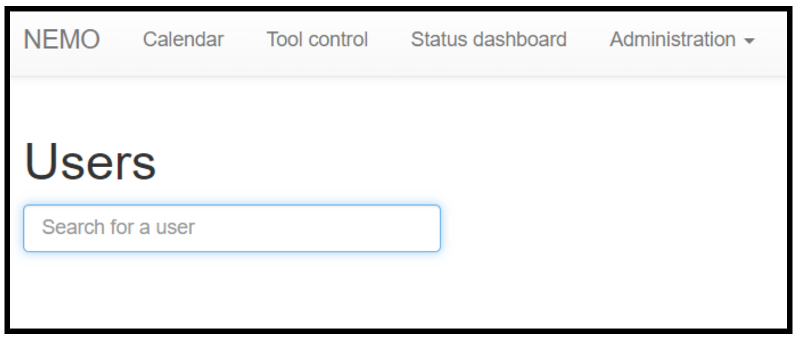


Figure 52.3: *Kiosk card reader users page*

- Enter the user name of interest and click their name when it appears or create a new user if needed (Figure 52.4).

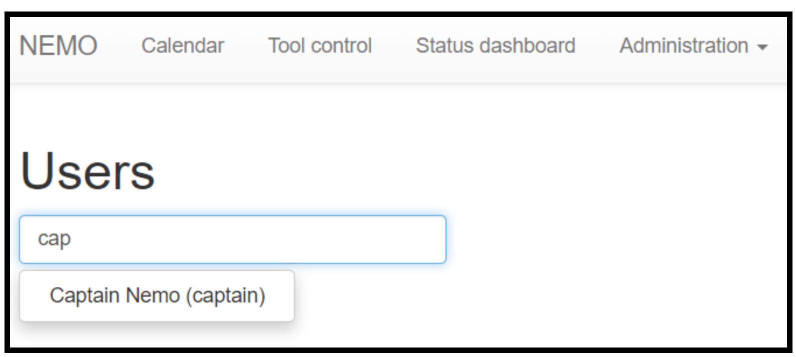


Figure 52.4: *Kiosk username*

- Click in the badge number dialog box and ensure there are no characters already entered (Figure 52.5).

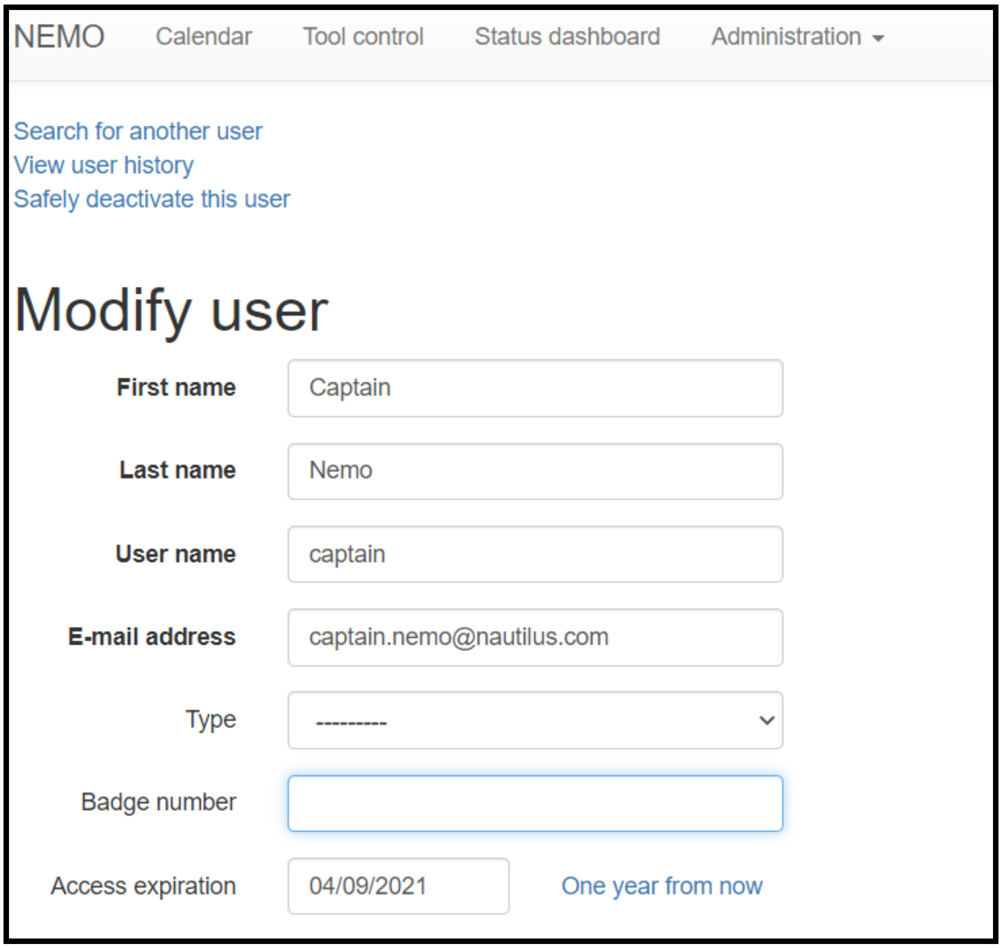


Figure 52.5: *Kiosk update user*

- Then, scan the users badge. The badge number will fill in and the user dialog will close (Figure 52.6).

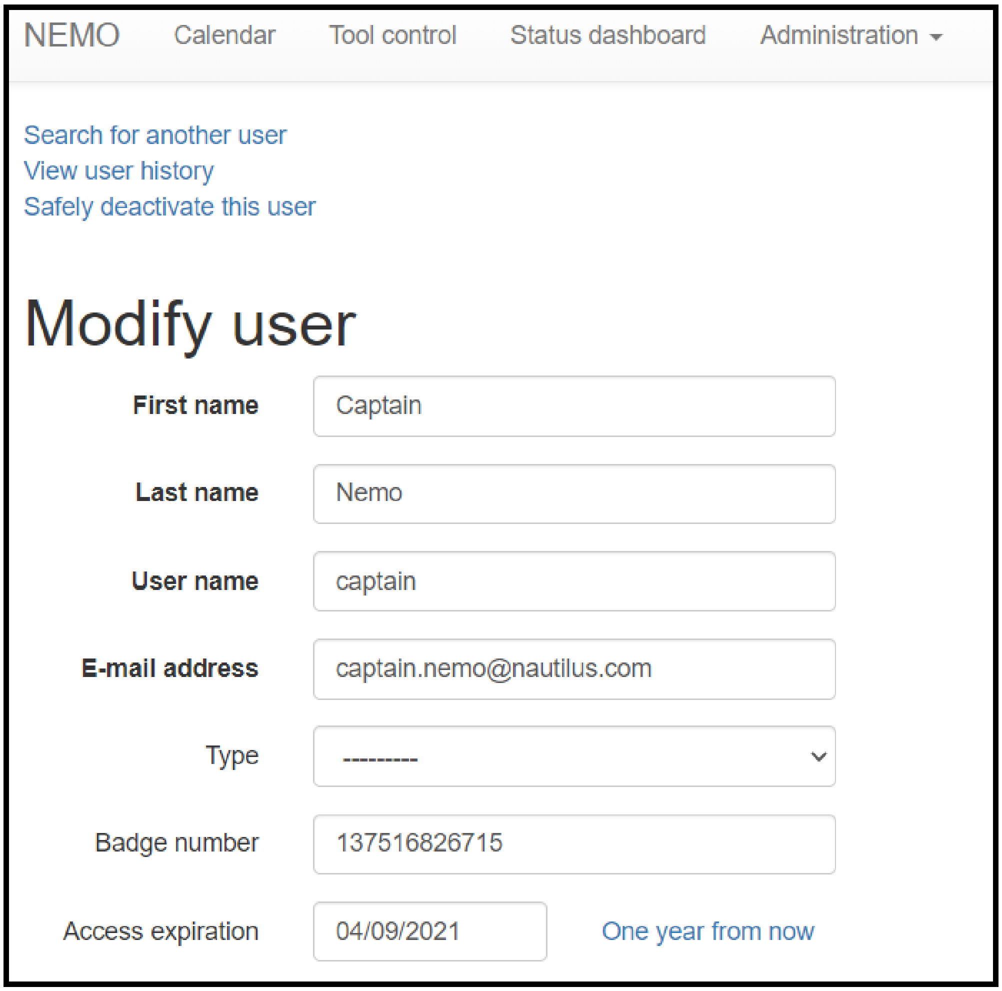


Figure 52.6: *Kiosk scan badge*

- An update successful message will appear at the top of the users page (Figure 52.7).

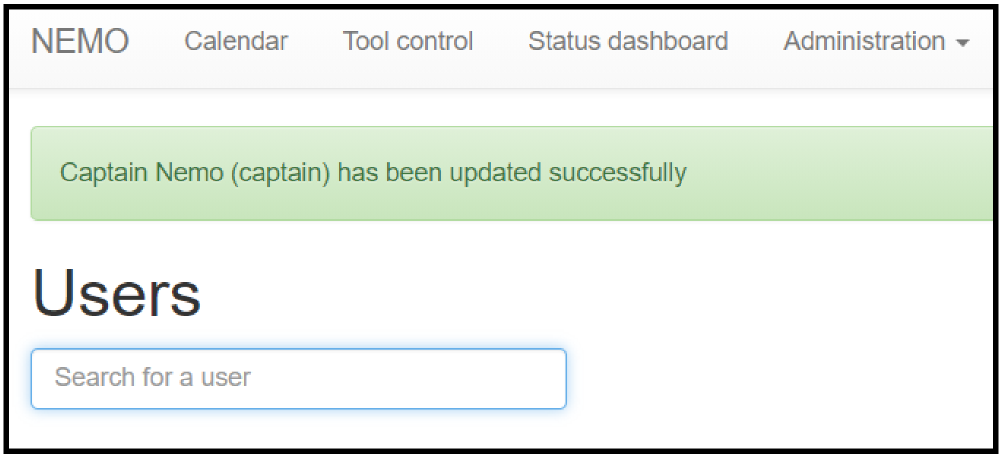


Figure 52.7: *Kiosk update success*

Once the kiosk tablet is confirmed to be operational, repeat the badge update for all users.

52.1.4 Web page

- Kiosk URL format – `site-address/kiosk/`

52.2 Usage

52.2.1 Access and main page

- When idle, the kiosk tablet will display the idle message (Figure 52.8). The idle message can be edited in the kiosk.html page in the kiosk/templates directory.

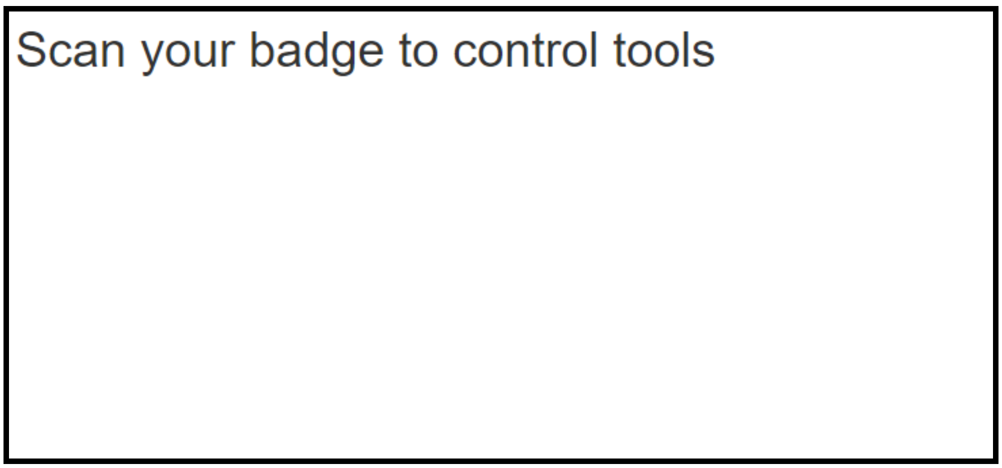


Figure 52.8: *Kiosk idle screen*

- If the category parameter is present, e.g. `site-address/kiosk/?category=Lithography` then the Kiosk will only display tools in that category after badging is successful.

- If the usage parameter is present, e.g. `site-address/kiosk/?usage`, tool usage will be displayed (Figure 52.9).

Chapter 52 Kiosk

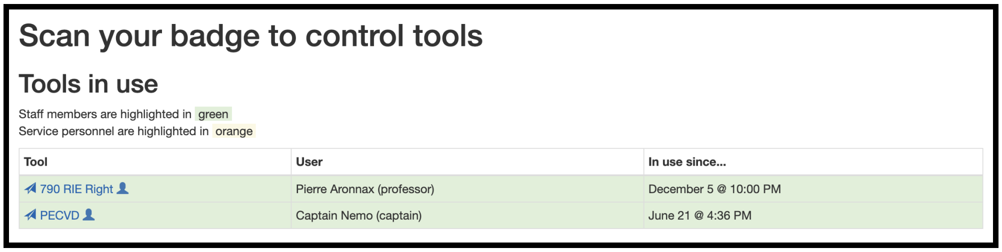


Figure 52.9: *Kiosk idle screen with tool usage*

- If the occupancy parameter is set for the area, e.g. `site-address/kiosk/?occupancy=Cleanroom`, occupancy will be displayed (Figure 52.10).

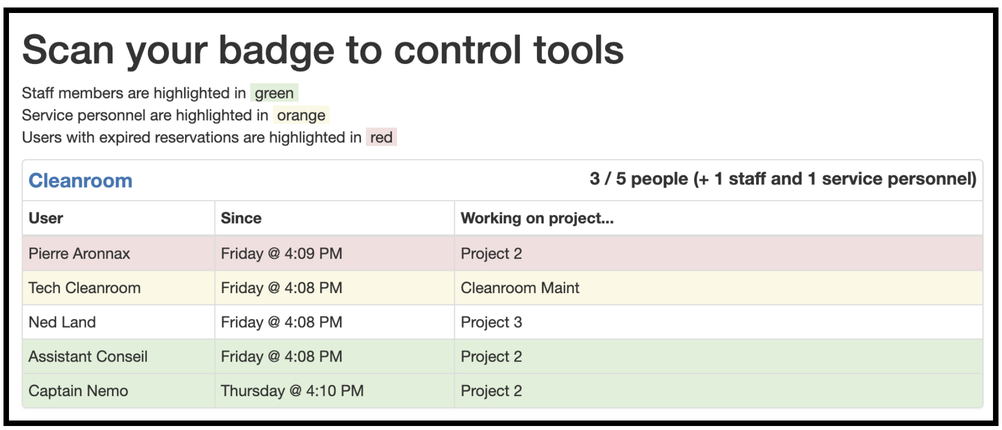


Figure 52.10: *Kiosk idle screen with area occupancy*

- If the alerts parameter is present, e.g. `site-address/kiosk/?alerts`, alerts will be displayed (Figure 52.11).

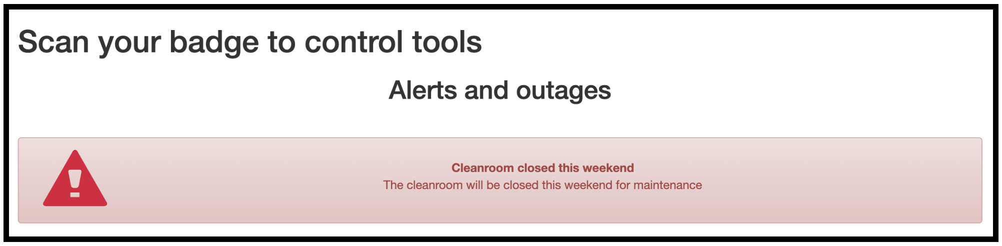


Figure 52.11: *Kiosk idle screen with alerts*

- The parameters can be combined, e.g. `site-address/kiosk/?occupancy=Cleanroom\&alerts\&usage`, each view will be displayed (Figure 52.12).

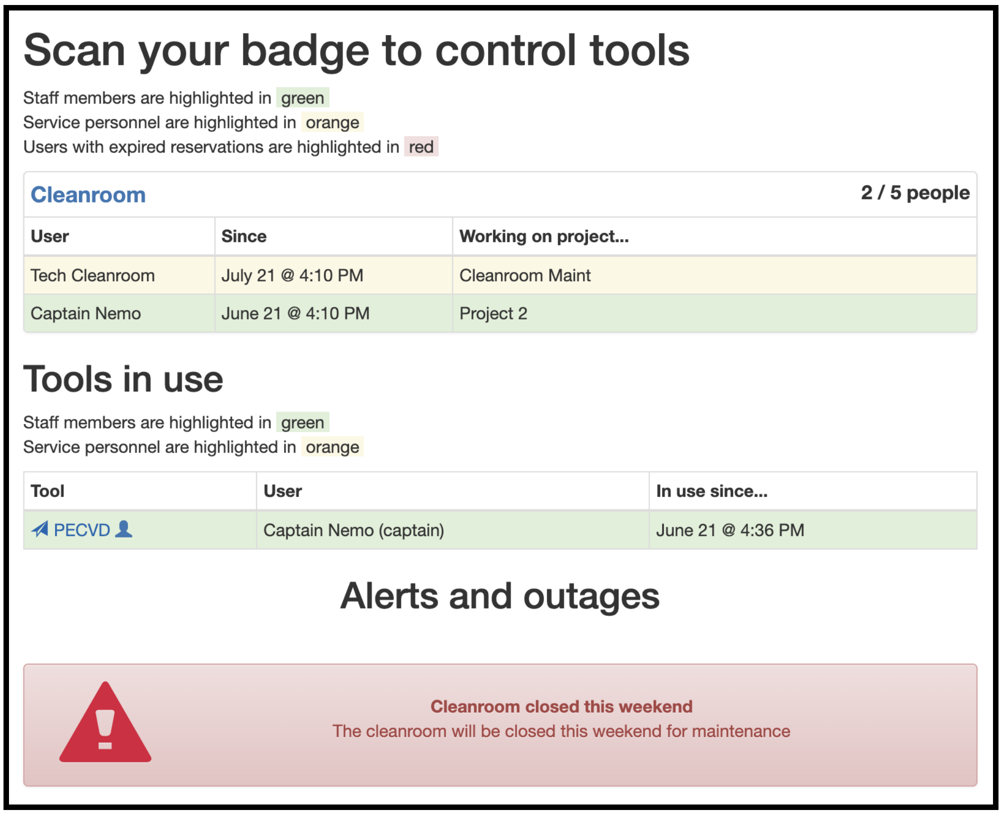


Figure 52.12: *Kiosk idle screen with combined views*

- Scan your badge at the card reader to begin. NOTE: after a badge scan if the user is prompted for additional information and does not respond the page will automatically return to the welcome screen. Wait times vary and are detailed with each prompt below.
  - Each time a badge is scanned, if the option is enabled in Customization $\rightarrow$ Application (section 41.2) the badge number is displayed on the screen greyed out (Figure 52.13). This is useful when determining why a user's badge isn't opening a door.

Figure 52.13: *Kiosk badge scan*

- If the badge isn't recognized, a message will be displayed, and the view will revert to the idle screen after 15 seconds (Figure 52.14).

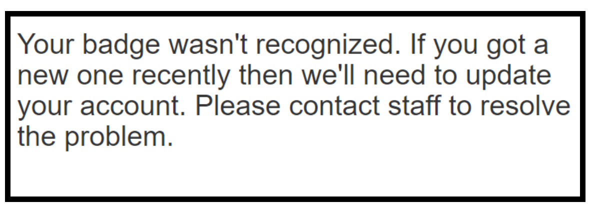


Figure 52.14: *Kiosk badge error*

- If there is a problem with user permissions, a message will be displayed, and the view will revert to the idle screen after 15 seconds (Figure 52.15).

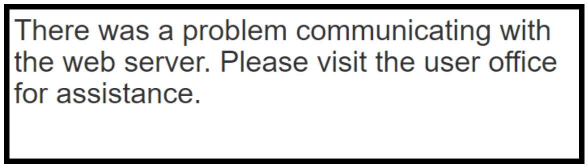


Figure 52.15: *Kiosk permission error*

- Upon success, the kiosk main page will appear (Figure 52.16). The page will revert to the idle screen after 75 seconds. The time remaining appears in the bottom right side of the screen. Anytime user input occurs, the timer is reset to 75 seconds.

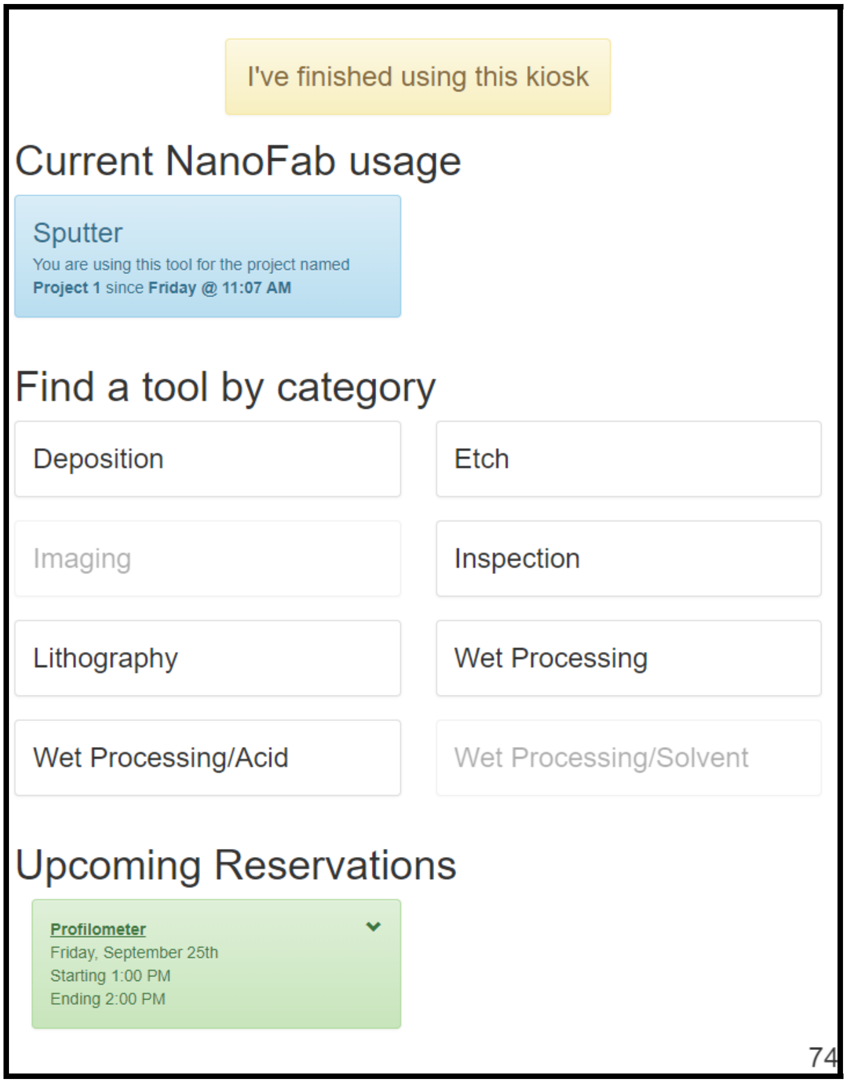


Figure 52.16: *Kiosk main page*

- Click the I've finished using the kiosk button to end the kiosk session (Figure 52.17). If no activity is detected in 75 seconds, the view will revert to the idle screen.

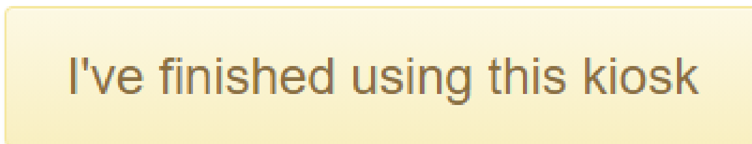


Figure 52.17: *Kiosk finished button*

- Current usage is displayed at the top of the screen (Figure 52.18). Click the tool usage of interest to open that tools detail page.

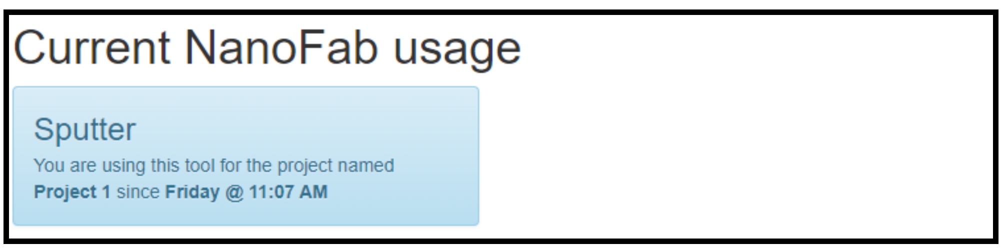


Figure 52.18: *Kiosk current usage*

- Tool can be accessed by clicking the category (Figure 52.19). Categories that are in grey mean the user does not have any qualifications on tools in that category. Clicking a category will open the tool selection page for the tool category.

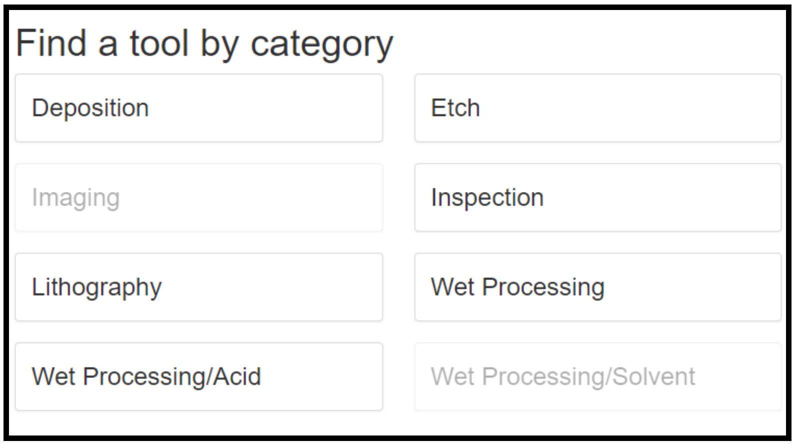


Figure 52.19: *Kiosk find tool*

- Upcoming reservations are displayed at the bottom of the screen (Figure 52.20). Click the reservation of interest to open that tools detail page.

Figure 52.20: *Kiosk reservations*

52.3 Tool selection

- Clicking a tool category on the main page will open the tool selection page for the selected category (Figure 52.21).
  - Icons are displayed next to each tool to provide status information and are described in the tool status icons section.
  - Click the tool button to open the tool detail page for the selected tool.
  - Click the ‘Go back’ button to return to the main page.
  - The page will revert to the idle screen after 60 seconds of no activity.

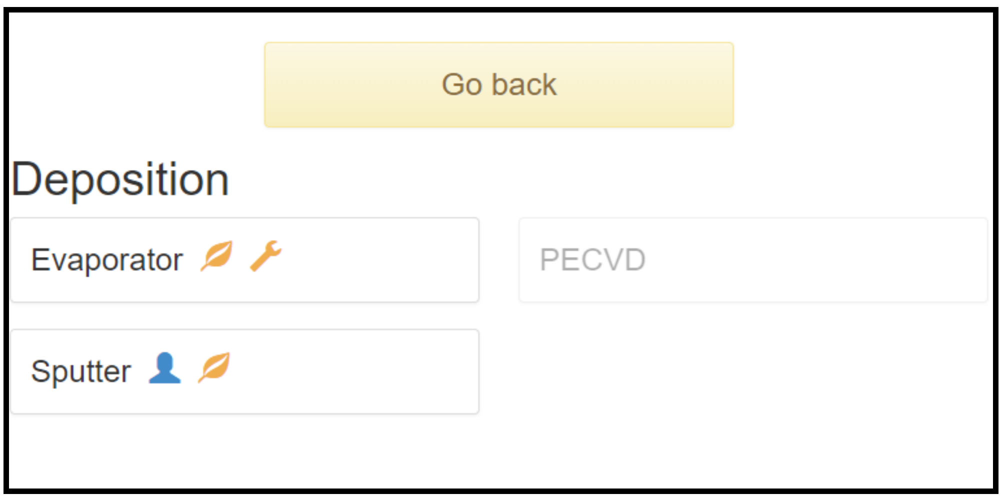


Figure 52.21: *Kiosk tool selection*

52.4 Tool detail

- Tool usage features are the same as the mobile view tool control features and are detailed in the tool control section.
- Tool reservation features are the same as the mobile view reservation features and are detailed in the reservations section.
- The tool detail page provides the tool status and buttons to use the tool and to reserve the tool (Figure 1154).

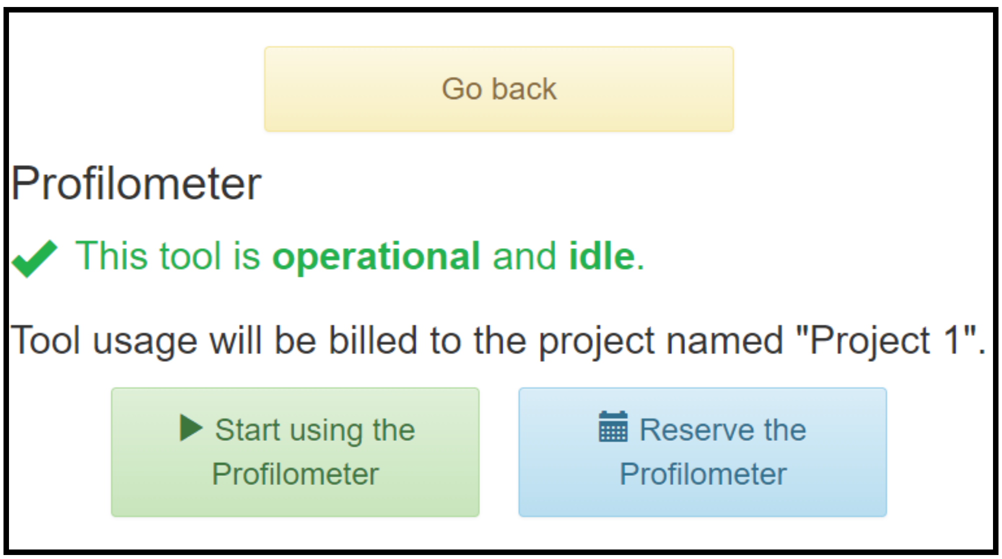


Figure 52.22: *Kiosk tool detail idle tool*

- If a tool is currently in use, usage information, a stop usage button, and a make reservation button are provided (Figure 1155).

Figure 52.23: *Kiosk tool detail tool in use*

– If the tool has numeric input pre/post usage questions configured (Figure 52.24), clicking in the dialog box will open a keypad for the user to enter the response (Figure 52.25).

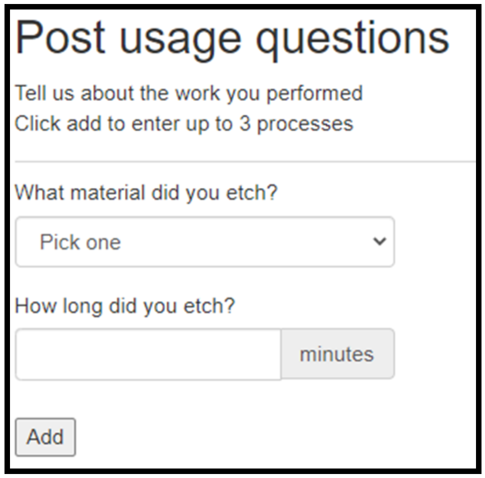


Figure 52.24: *Kiosk pre/post usage questions*

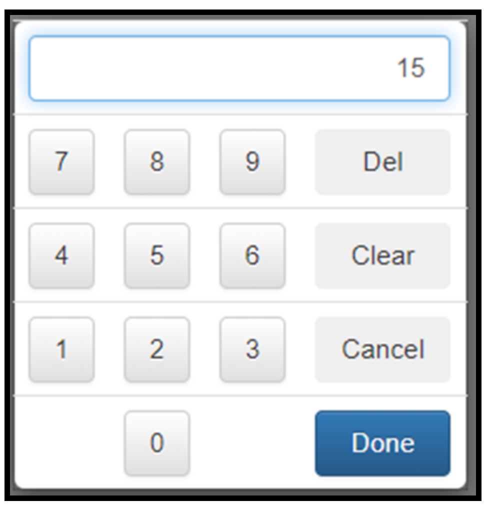


Figure 52.25: *Kiosk pre/post usage question and delayed logout numeric input keypad*

- If the tool has delayed logout configured, clicking in the dialog box will open a keypad for the user to enter the delay time to prevent other users login (Figure 52.26).

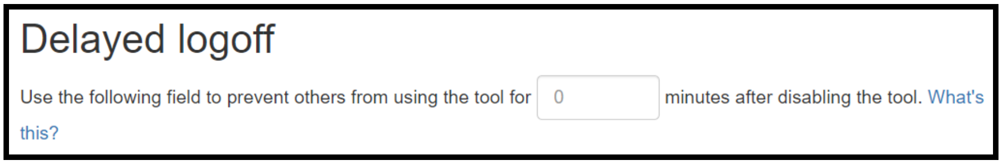


Figure 52.26: *Kiosk delayed logout dialog*

- If a user clicks on a tool they are not qualified to use, information about how to get trained is provided (Figure 52.27).

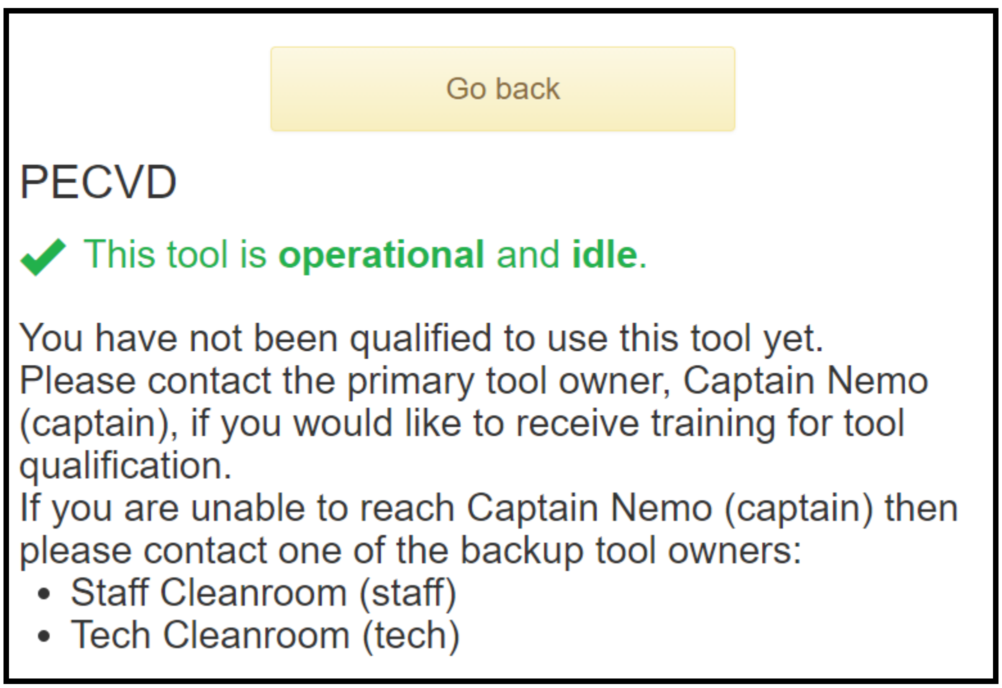


Figure 52.27: *Kiosk tool detail not qualified for tool*

CHAPTER 53

Entrance tablet

The entrance tablets are used to provide an interface for users to access labs and choose the appropriate project to bill lab time against. Entrance tablets are associated with door that have been defined in the doors table of the database. This method allows multiple entrance and exit tablets to be associated with one area but multiple doors and locks. Tablets or computers can be configured to allow users to sign into an area and open the door (entrance tablet) as well as sign them out when they leave (exit tablet).

53.1 Setup

To enable this feature, you need to have NEMO.apps.area_access in INSTALLED_APPS in your settings.py. The use of an entrance or exit tablet requires a door that is tied to an interlock that will unlock a door and an entrance tablet configured to interface with NEMO and send the appropriate messages.

53.1.1 Door setup

Doors are setup in the doors table of the database. The doors table associates areas with interlocks.

Physical access levels must be established to provide users with a time schedule that they can access a door, see section 43.32. Users are given physical access level permission on the users page.

Areas are created in the areas table of the database and are used to group tools into common spaces, see section 43.8. When a tool is located in an area, the requires area access field in the tools table for the tool of interest should be updated to require the active area access. This will prevent users enabling or disabling the tool unless they are currently logged into the area.

Interlocks are created in the interlocks table, see section 43.26. An interlock must be associated with an interlock card which are created in the interlocks card table.

53.1.2 Entrance tablet user

A dedicated user should be setup for entrance tablets. That user must have the following permissions which are set in the users table of the database:

- NEMO|area access record|Can add area access record
- NEMO|area access record|Can change area access record

53.1.3 Card reader

The entrance tablet uses a badge reader to identify the user. Usually, an identity card that users of the facility already have can be utilized, but there are also tokens that can be used. NEMO defaults to expecting the F2 character to start recording the badge number and another F2 character to end and submit the badge number similar to what is provided by a pcProx Plus card reader (Figure 53.1). NIST does not endorse this product, but the information is provided as an example of the type of reader that can be used.

Figure 53.1: *Entrance tablet card reader example*

If your card reader uses different characters, a custom badge reader configuration can be setup in the badge reader table.

Once the card reader is setup, it can be tested by opening notepad or other computer text editor software then scan a badge. A serial number should be seen (Figure 53.2).

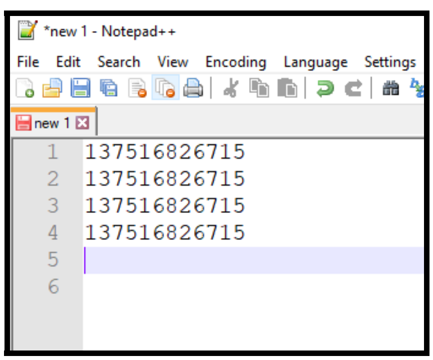


Figure 53.2: *Entrance tablet card reader test example*

53.1.4 User setup

Now that the door and card reader are setup, each user needs to have their badge number entered into their user profile and be given permission to access the door. This is easily accomplished by setting up a card reader on a computer that has access to NEMO by a staff member. Then follow these steps:

- Navigate to the Administration → Users page (Figure 53.3).

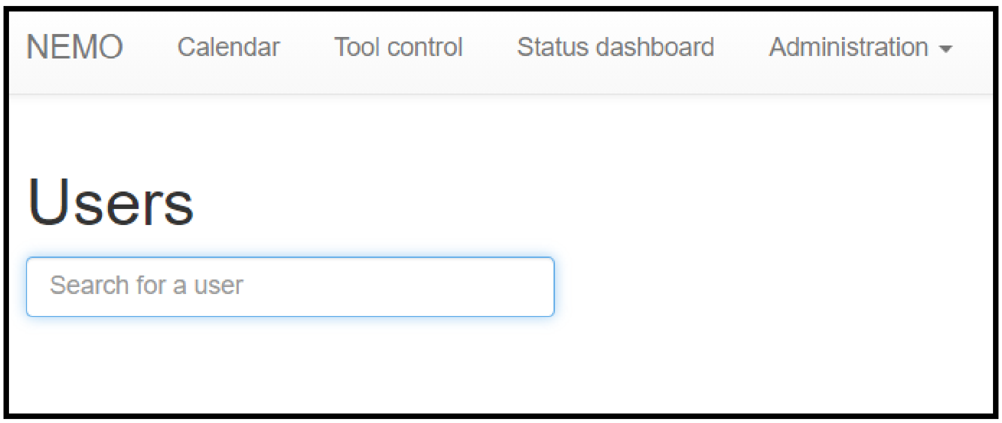


Figure 53.3: *Entrance tablet card reader users page*

- Enter the user name of interest and click their name when it appears or create a new user if needed (Figure 53.4).

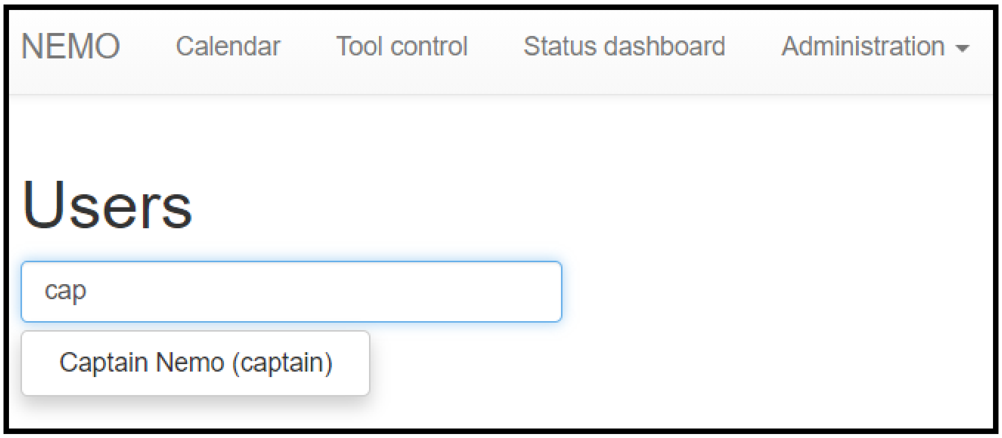


Figure 53.4: *Entrance tablet user name*

- Scroll down and update the physical access level for the user (Figure 53.5). Note: staff and super users may already have access by default if the physical access level was set up to allow staff access. In that case, the checkboxes will be checked but greyed out.

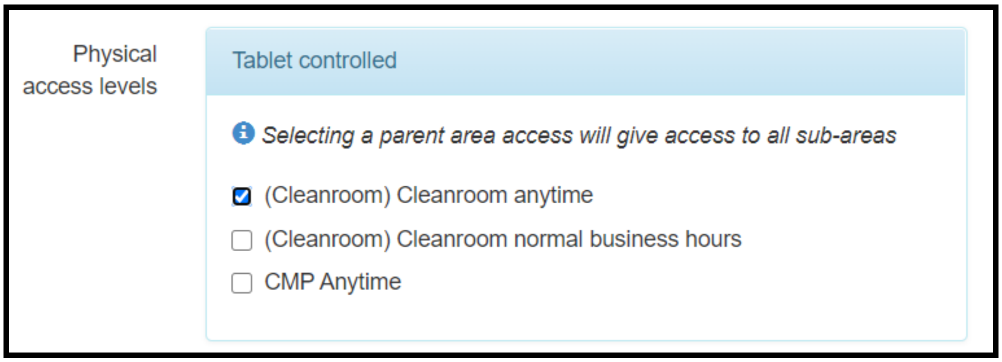


Figure 53.5: *Entrance tablet physical access*

- Click in the badge number dialog box and ensure there are no characters already entered (Figure 53.6).

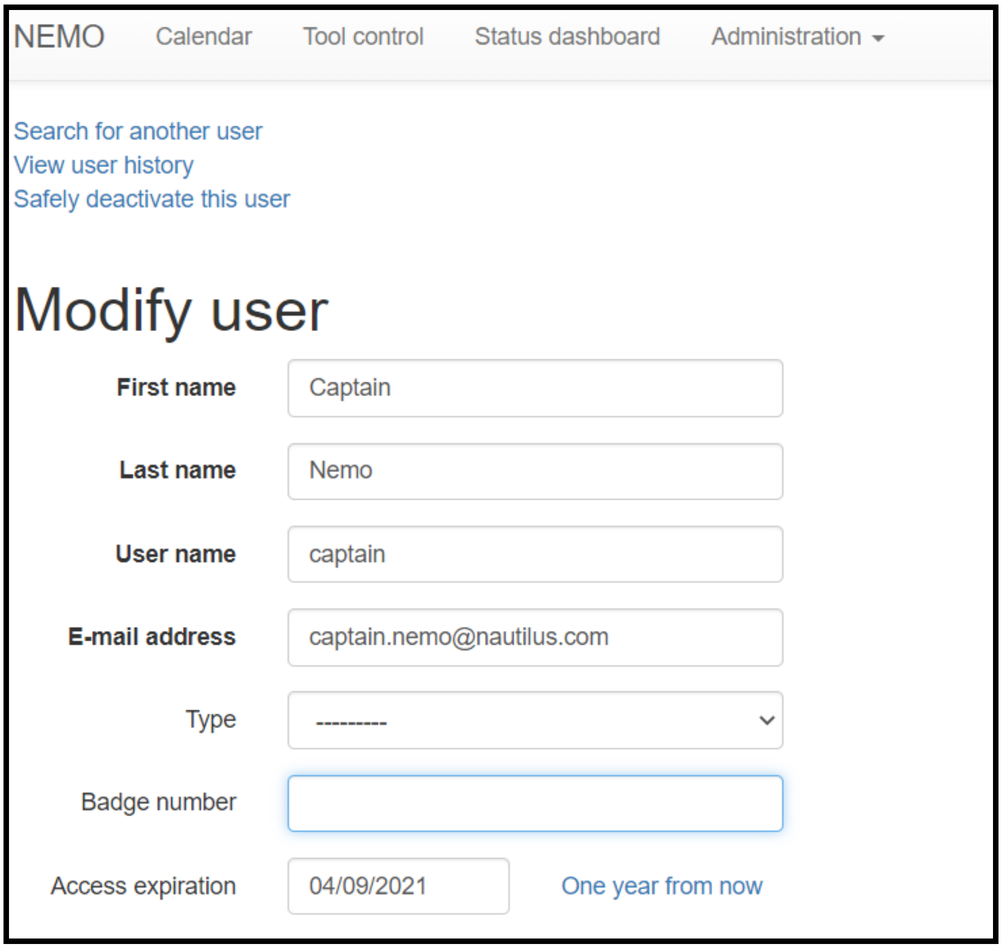


Figure 53.6: *Entrance tablet update user*

- Then, scan the users badge. The badge number will fill in and the user dialog will close (Figure 53.7).

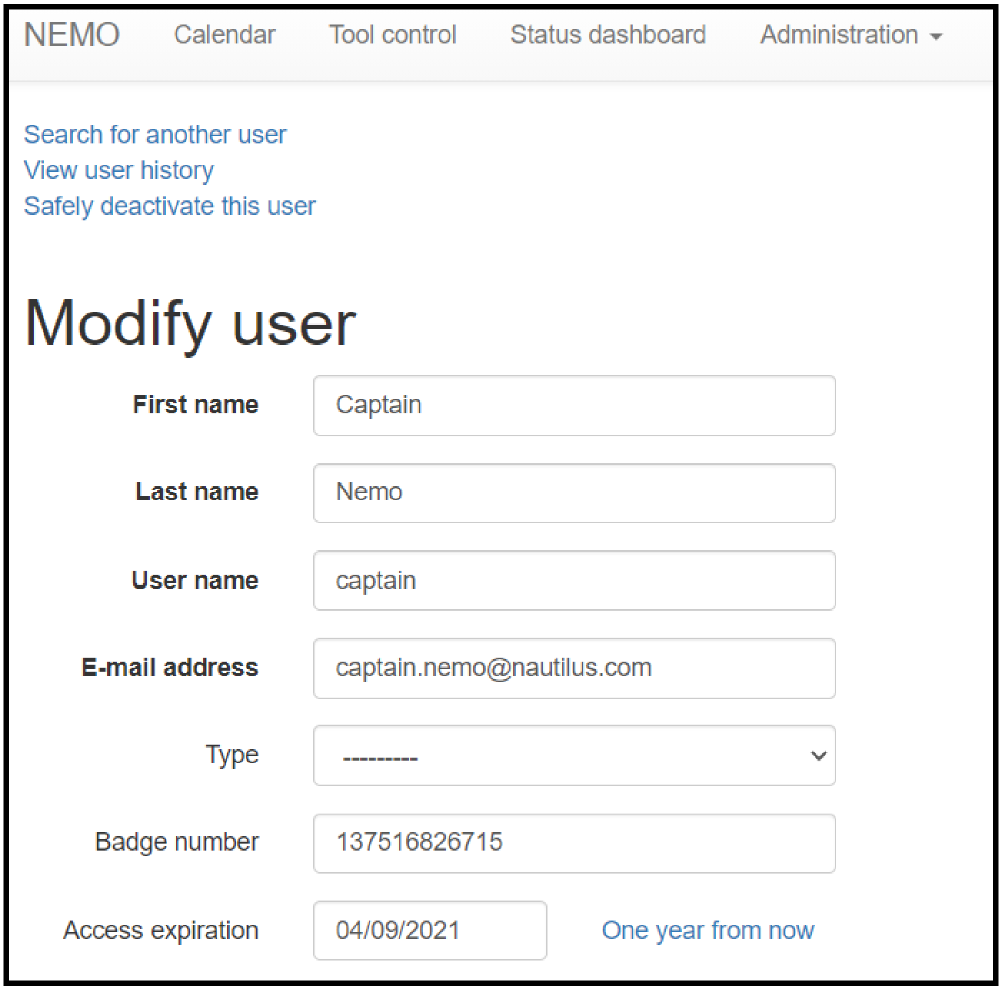


Figure 53.7: *Entrance tablet scan badge*

- An update successful message will appear at the top of the users page (Figure 53.8).

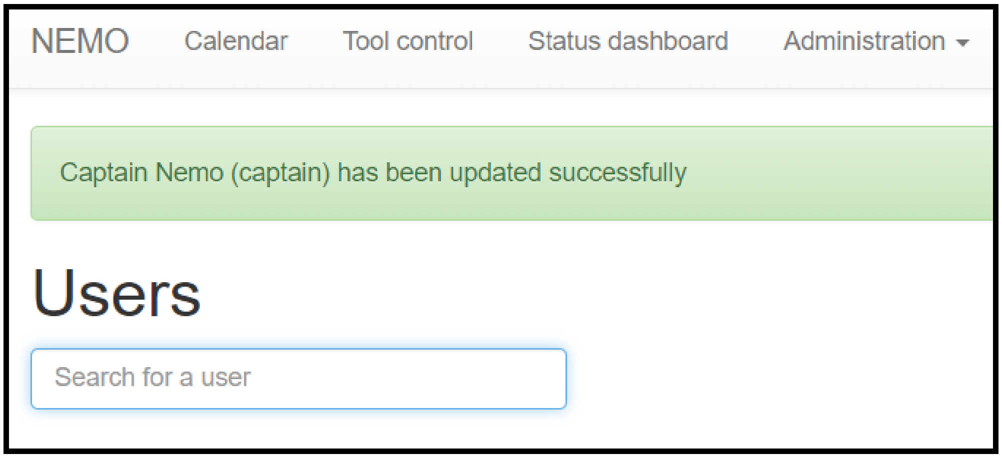


Figure 53.8: *Entrance tablet update success*

- Once the entrance tablet is confirmed to be operational, repeat the badge update for all users.

53.1.5 Web page

The webpage URL for each door is listed on the doors summary page (Figure 53.9).

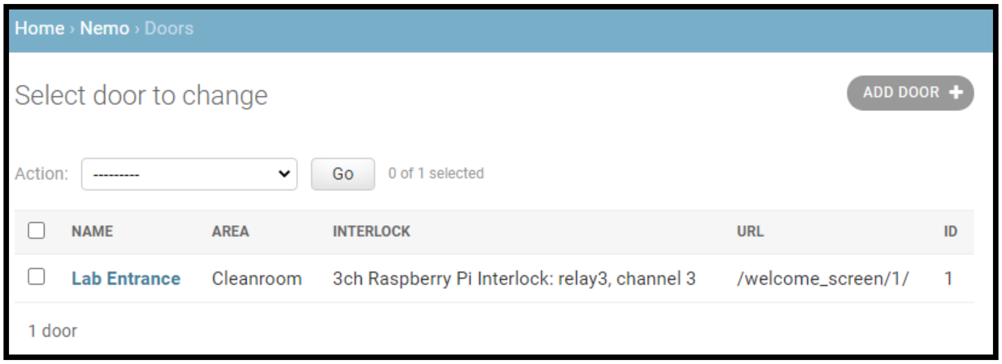


Figure 53.9: *Doors summary page*

- Entrance URL – site-address/welcome_screen/{door_ID}/
- Exit URL – site-address/farewell_screen/{door_ID}/

In addition, the current occupants of the area can be displayed on the idle tablet by including the occupancy parameter and providing the case sensitive area name.

- Entrance URL with occupancy:
  site-address/welcome_screen/{door_ID}/?occupancy=Cleanroom.
- Exit URL:
  site-address/farewell_screen/{door_ID}/?occupancy=Cleanroom.

53.2 Usage

53.2.1 Entrance Tablet

- When idle, the entrance tablet will display the welcome message that was set in the door table (Figure 53.10).

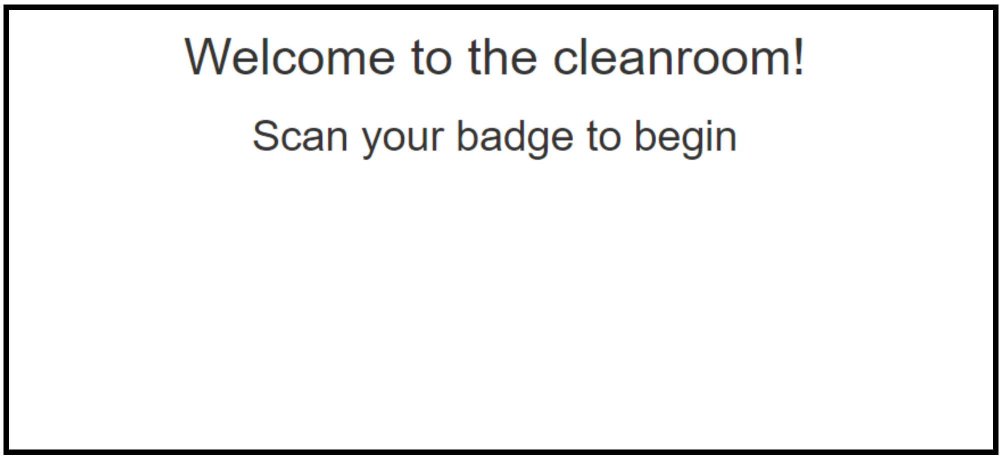


Figure 53.10: *Entrance tablet welcome screen*

- If the occupancy parameter is set for the area, e.g. site-address/welcome_screen/1/?occupancy=Cleanroom, occupancy will be displayed as well (Figure 53.11).

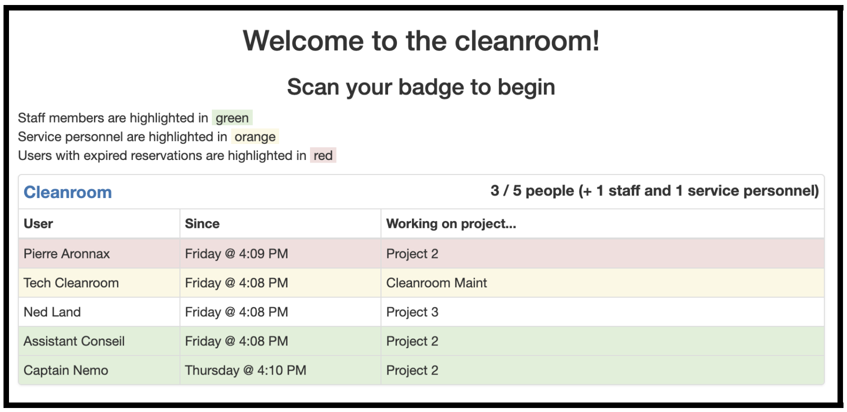


Figure 53.11: *Entrance tablet welcome screen with area occupancy*

- Scan your badge at the card reader to begin the login process. NOTE: after a badge scan if the user is prompted for additional information and does not respond the page will automatically return to the welcome screen. Wait times vary and are detailed with each prompt below.
  - Each time a badge is scanned, if the option is enabled in Customization → Application (section 41.2) the badge number is displayed on the screen greyed out (Figure 53.12). This is useful when determining why a user's badge isn't opening a door.

Figure 53.12: *Entrance tablet badge scan*

– If there are more than one area linked to the door, a dialog to select an area will appear (Figure 53.13). Select the area to log into or select 'Nevermind, don't log in' to return to the welcome screen. If no input is provided within 30 seconds, the page will return to the welcome screen.

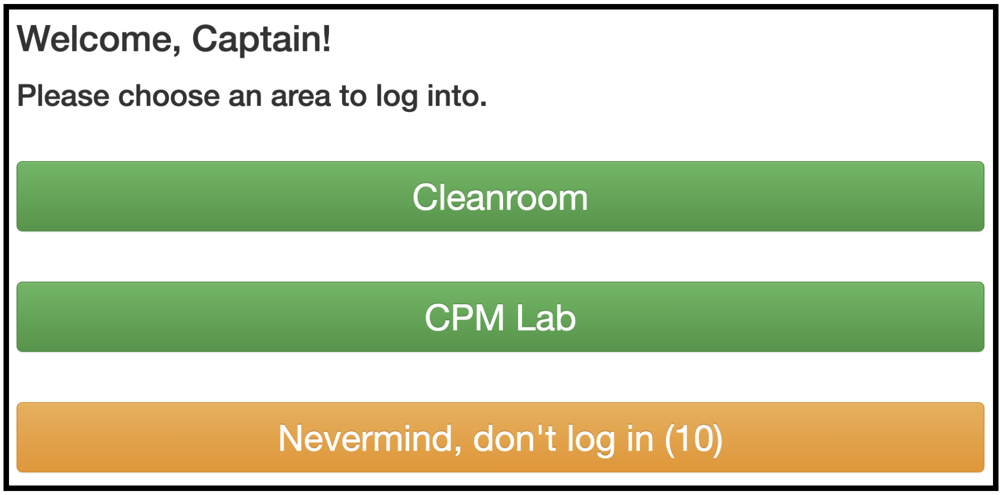


Figure 53.13: *Entrance tablet multiple areas*

– If you have multiple projects, a dialog to select your project will appear (Figure 53.14). Select the project to be billed or select 'Nevermind, don't log in' to return to the welcome screen. If no input is provided within 30 seconds, the page will return to the welcome screen.

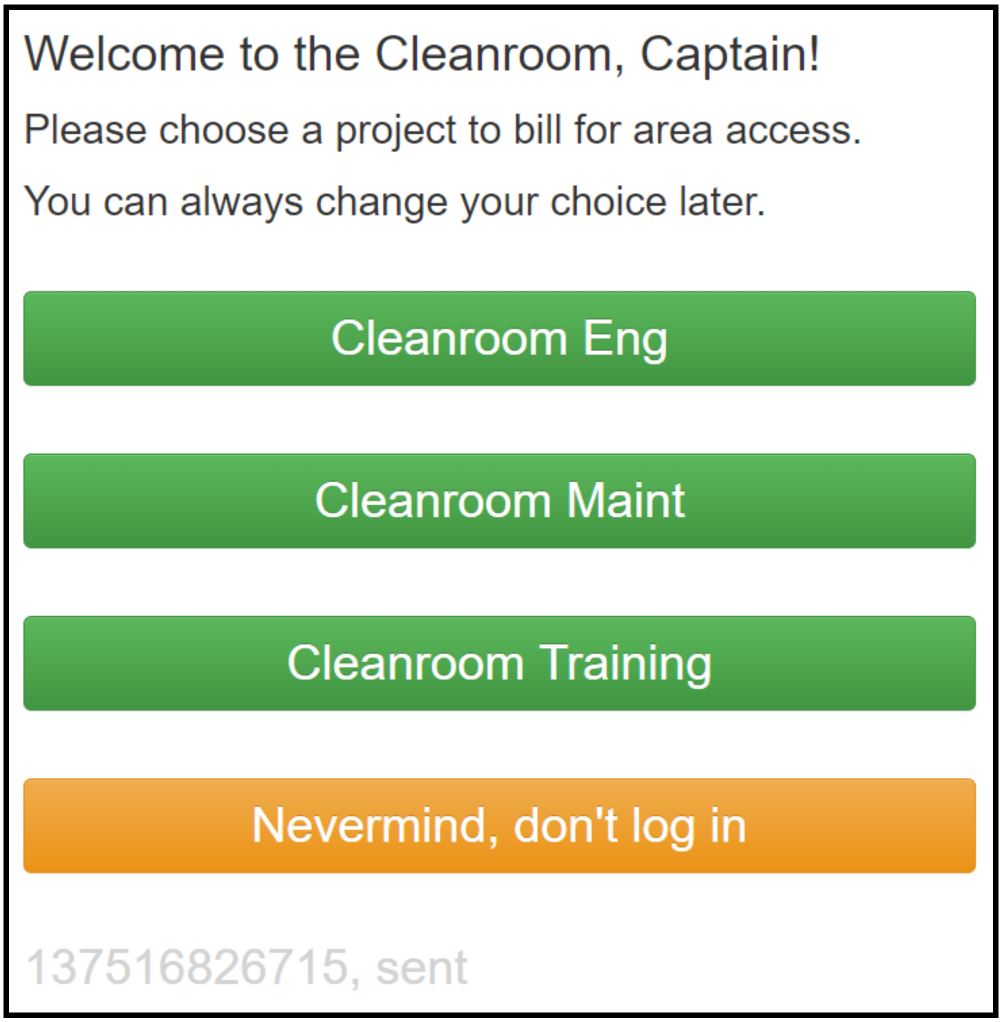


Figure 53.14: *Entrance tablet multiple projects*

– If you are already logged in to the area, a dialog with a list of possible actions is displayed (Figure 53.15). Select the action to take. If no input is provided within 15 seconds, the page will return to the welcome screen.

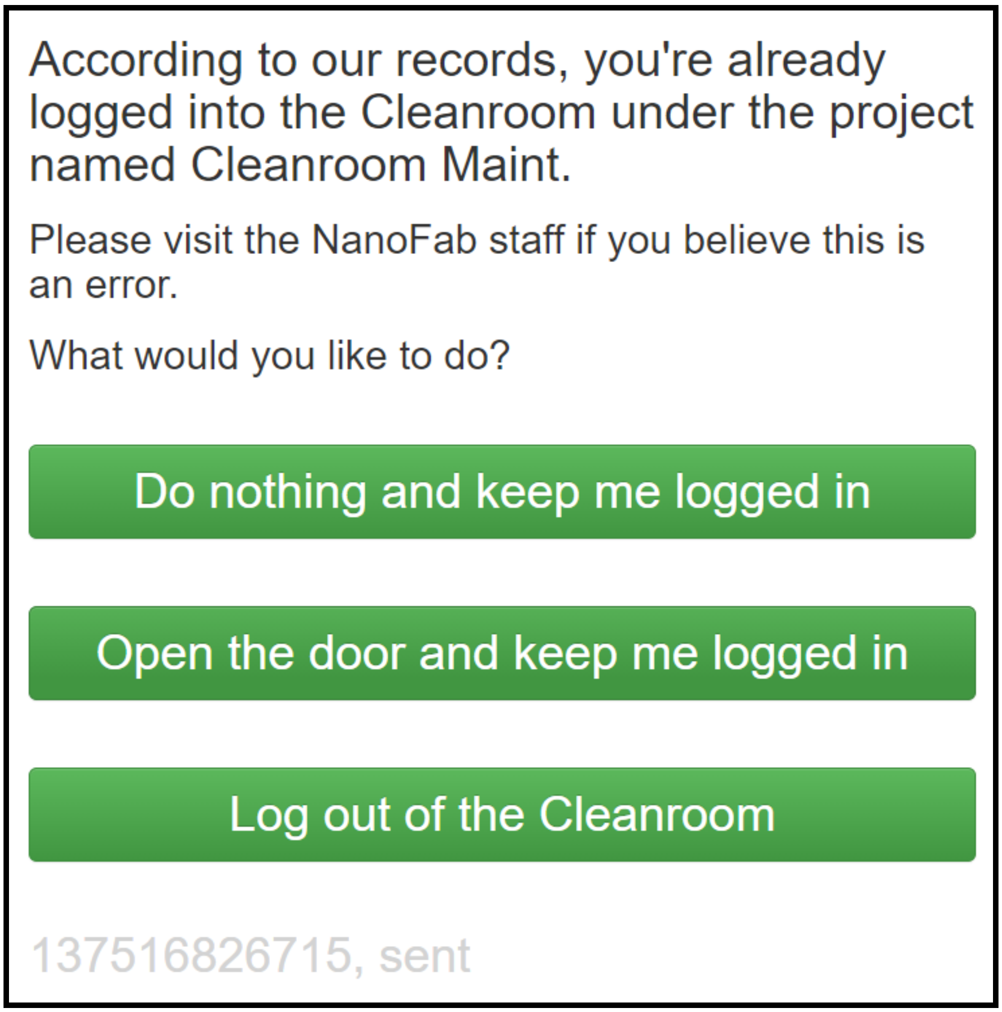


Figure 53.15: *Entrance tablet already logged in*

- Selecting ‘Do nothing and keep me logged in’ will return to the welcome screen.
- Selecting ‘Open the door and keep me logged in’ will display a door unlocked dialog (Figure 53.16) and unlock the door for 8 seconds then return to the welcome screen.
- Selecting ‘Log out of the Cleanroom’ will end your area access. Note: additional screens displayed are detailed in the Exit tablet section below.

Figure 53.16: *Entrance tablet door open*

- If an error occurs a dialog will appear informing the user of the issue. Log in errors are described in section 53.3 below.
- Upon success, the user will be logged into the area, a record will be recorded in the area access records table, a record will be recorded in the physical access logs table, and the door will open for 8 seconds. A success message will be displayed while the door is unlocked then revert to the welcome screen (Figure 53.17).

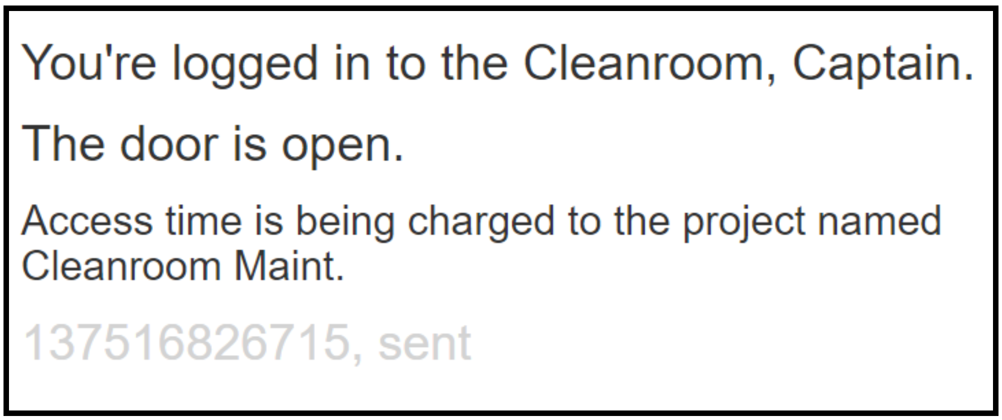


Figure 53.17: *Entrance tablet success message*

- If the user was already logged into a different area, they will be prompted with a dialog notifying them that they were logged out of the other area and logged into the new area (Figure 53.18).

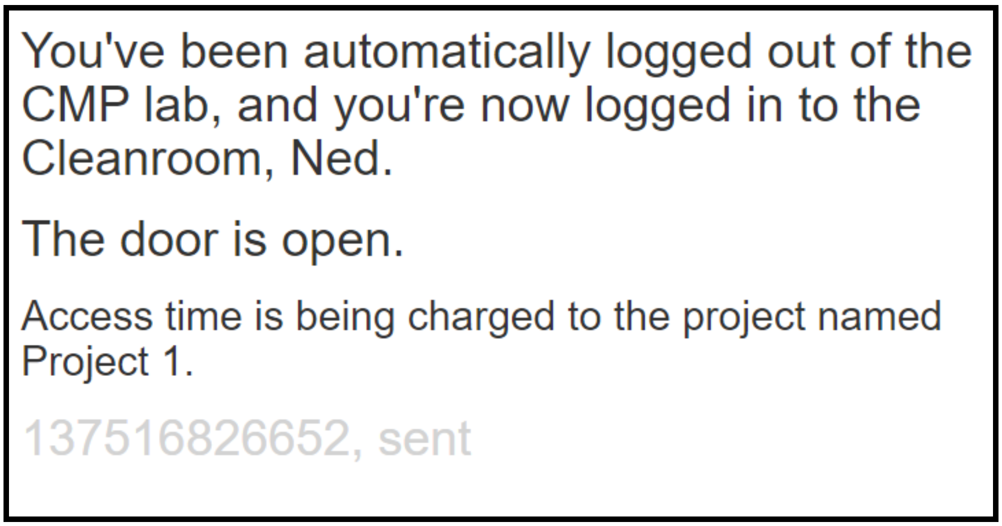


Figure 53.18: *Entrance tablet success message area change*

53.3 Login errors

If an error occurs a dialog will appear informing the user of the issue. Errors will be displayed for 15 seconds then the page will revert to the welcome screen.

- Physical access denied.
  - The area requires a reservation, and the user does not have one (Figure 53.19). Requiring reservations to access an area are set in the areas table, see section 43.8.

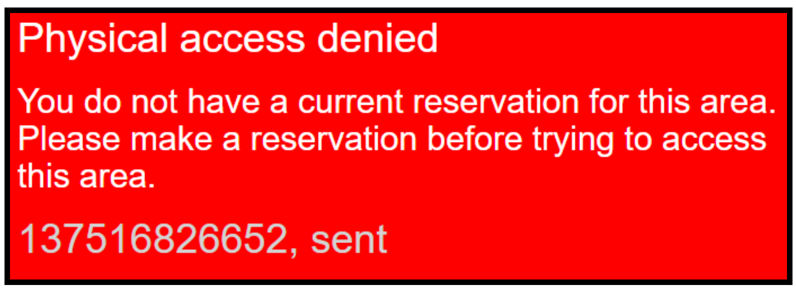


Figure 53.19: *Entrance tablet reservation error*

  - The area occupancy limit has been reached (Figure 53.20). Occupancy limits are set in the areas table, see section 43.8.

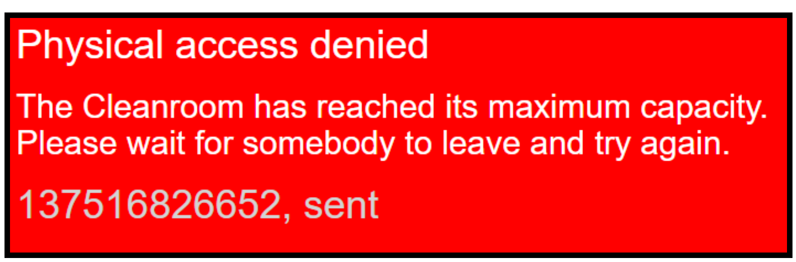


Figure 53.20: *Entrance tablet occupancy error*

– No physical access levels have been granted to the user (Figure 53.21). Physical access level permissions are set in the users page or the users table.

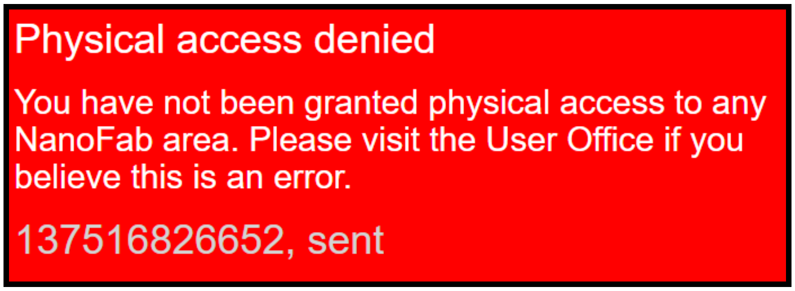


Figure 53.21: *Entrance tablet access level error*

– Access has expired (Figure 53.22). Access expiration dates are set in the users page or the users table.

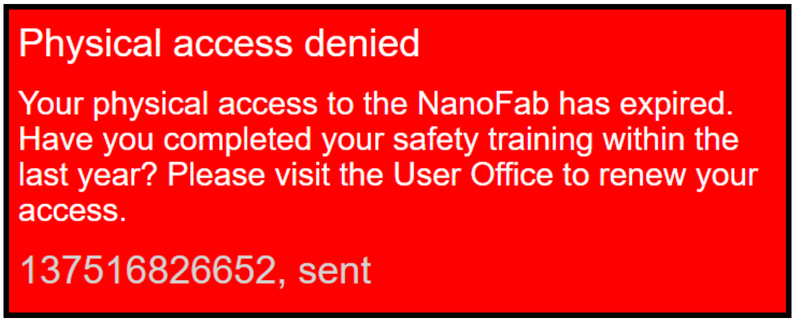


Figure 53.22: *Entrance tablet access expired error*

– The area has a scheduled outage in progress (Figure 53.23). Scheduled outages are created on the resources page or the scheduled outages table.

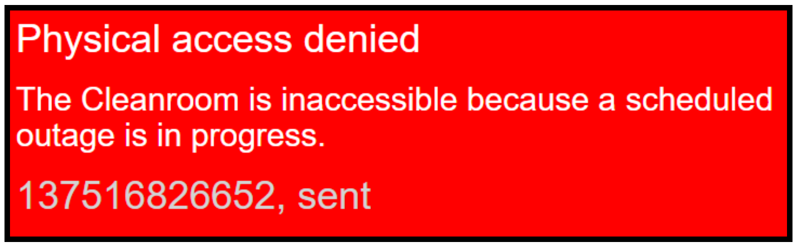


Figure 53.23: *Entrance tablet outage error*

– The area has a physical access exception in progress (Figure53.24). Physical access exceptions are used to block access that would normally be granted to a physical access level. This feature is used for holiday schedules, emergency closures, or other reasons to prevent access at an otherwise accessible time. More information about physical access exceptions can be found in the Detailed administration $\rightarrow$ Physical access exceptions.

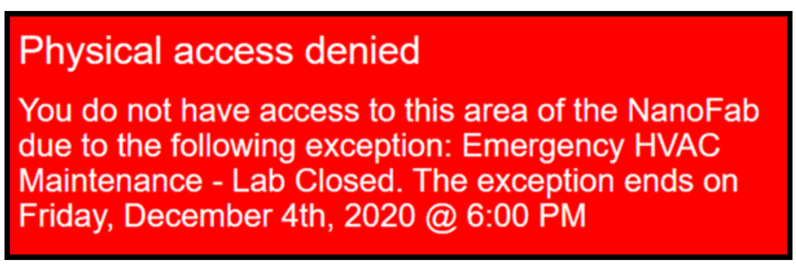


Figure 53.24: *Entrance tablet physical access exception error*

- Account deactivated (Figure 53.25). User accounts are activated/deactivated in the users page or the users table.

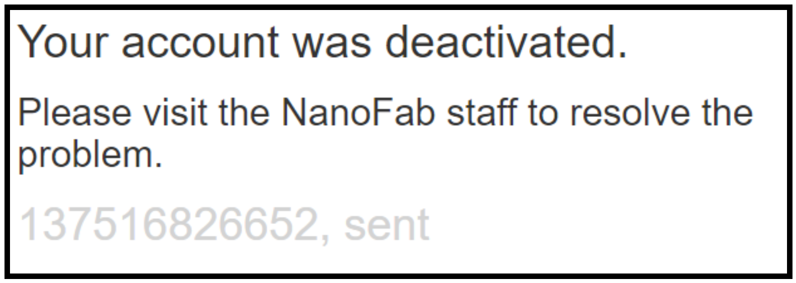


Figure 53.25: *Entrance tablet deactivated error*

- No active project (Figure 53.26). Projects are associated with users on the accounts and projects page, the users page or the users table.

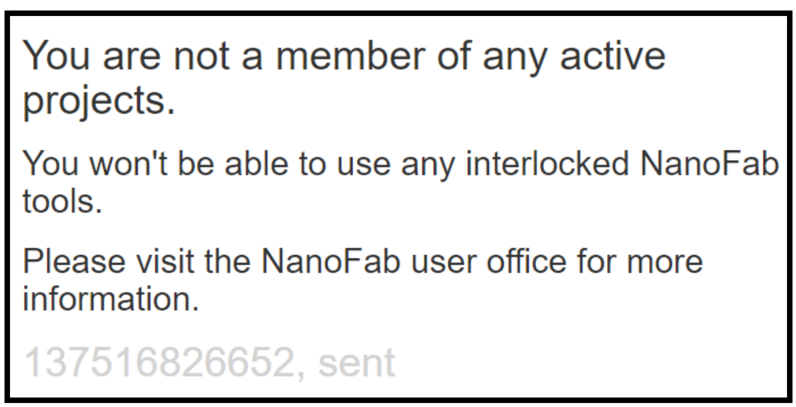


Figure 53.26: *Entrance tablet project error*

- Badge not found (Figure 53.27). Badge numbers are recorded for users in the users page or the users table.

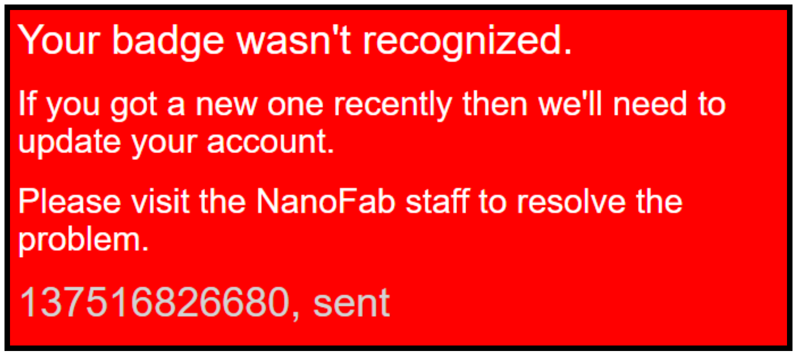


Figure 53.27: *Entrance tablet badge error*

- A required resource is not available (Figure 53.28). Resources are maintained on the resources page, see chapter 33.

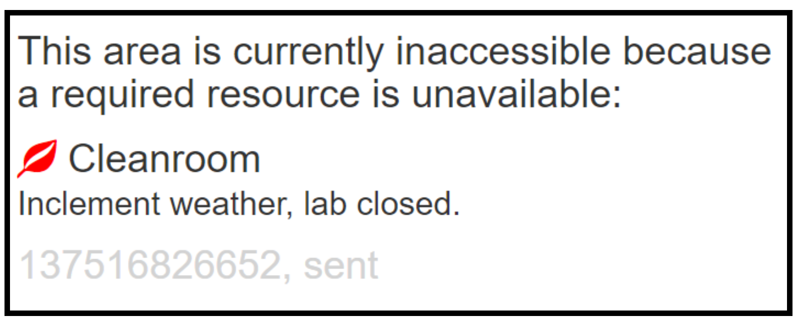


Figure 53.28: *Entrance tablet resource error*

- Interlock command failed (Figure 53.29). The interlock command failed, you can choose to login anyway (if that option is checked), try again or cancel.

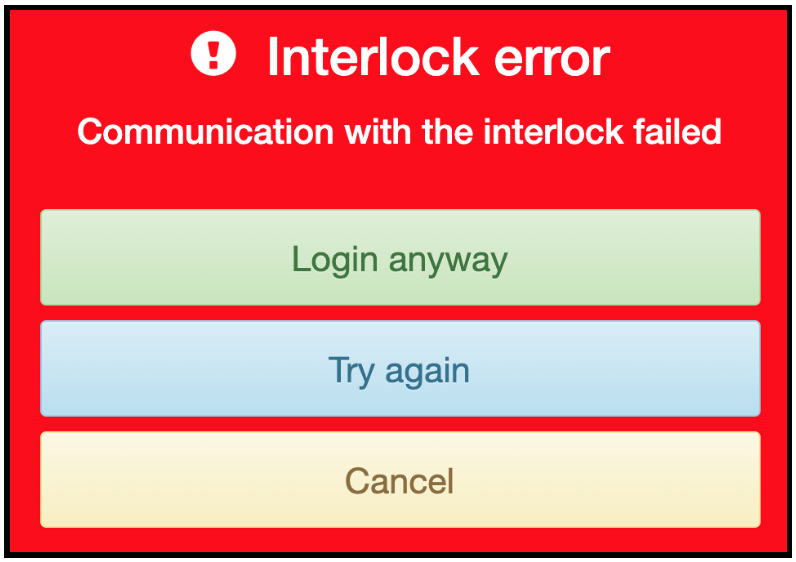


Figure 53.29: *Entrance tablet interlock error*

53.3.1 Exit Tablet

- When idle, the exit tablet will display the farewell message (Figure 53.30).

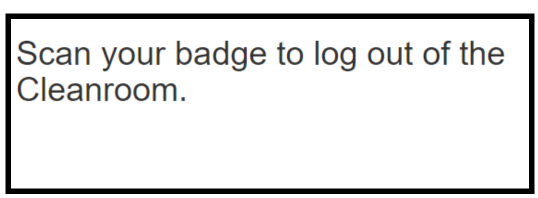


Figure 53.30: *Exit tablet farewell screen*

- If the occupancy parameter is set for the area, site-address/farewell_screen/1/?occupancy=Cleanroom, occupancy will be displayed as well (Figure 53.32).

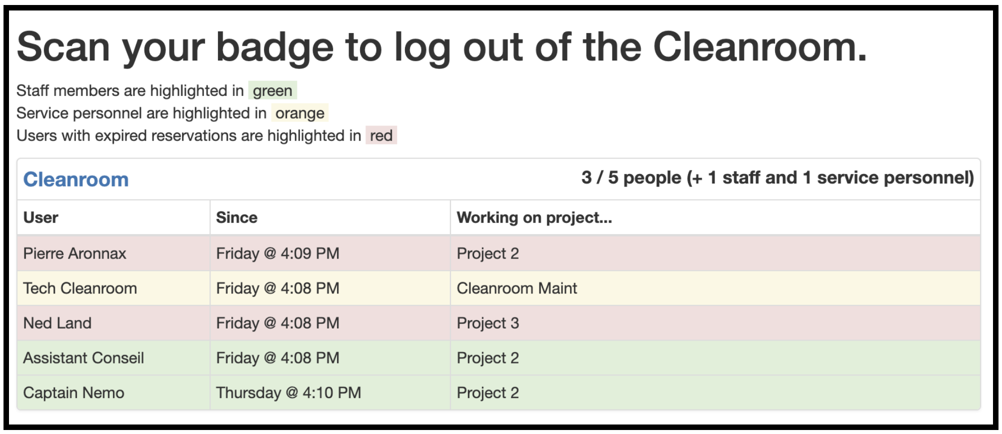


Figure 53.31: *Exit tablet farewell screen with area occupancy*

- Scan your badge at the card reader to begin the log out process.
  - Each time a badge is scanned, the badge number is displayed on the screen greyed out (Figure 53.32). This is useful when determining why a user's badge isn't working properly.

Figure 53.32: *Exit tablet badge scan*

- If the user is a staff member and was logged in on behalf of another user, they will be automatically logged out as well.
- If the user is still logged into a tool in the area, a warning is displayed on an orange background along with a list of tools the user is currently logged into. and the user is logged out of the area (Figure 53.33).

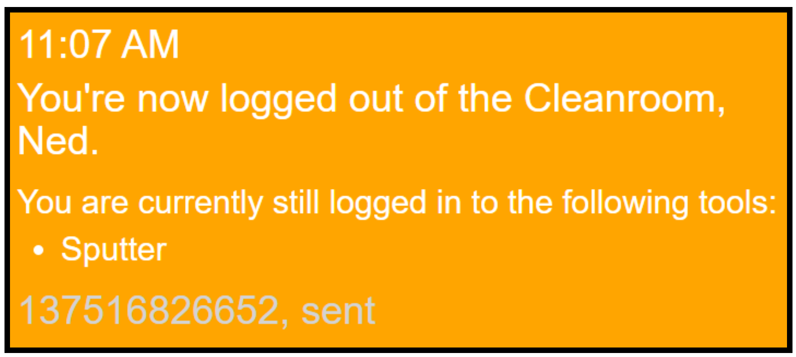


Figure 53.33: *Exit tablet logout warning*

- If the user is not logged into any tools in the area, a green background is displayed along with a success message and the user is logged out (Figure 53.34).

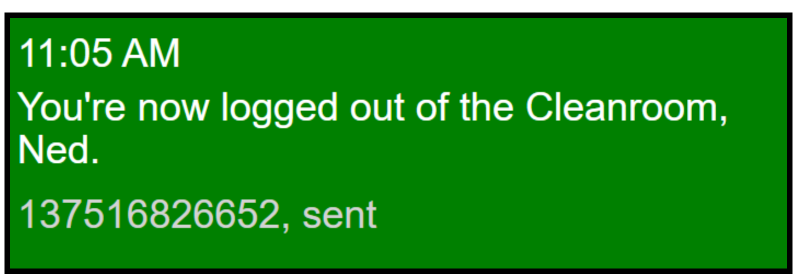


Figure 53.34: *Exit tablet logout*

– If the door is linked to more than one area, upon logging out the user will be presented with the choice to log into another one of the linked areas (Figure 53.35).

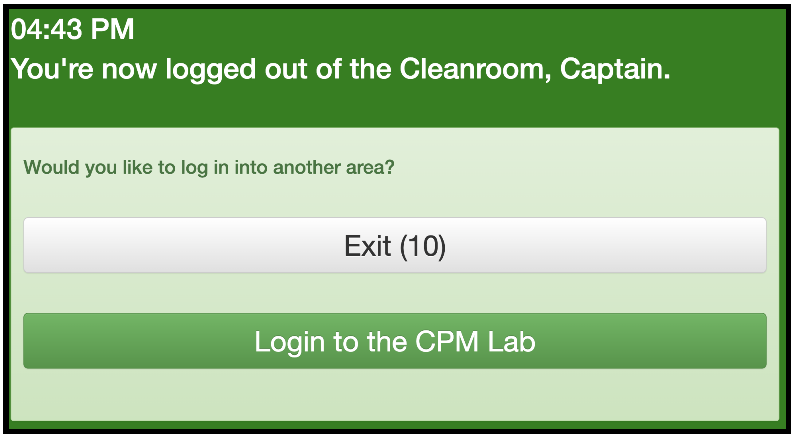


Figure 53.35: *Exit tablet logout multiple areas*

– If an error occurs a dialog will appear informing the user of the issue. Errors will be displayed for 15 seconds then the page will revert to the farewell screen.

  * Badge not found (Figure 53.36). Badge numbers are recorded for users in the users page or the users table.

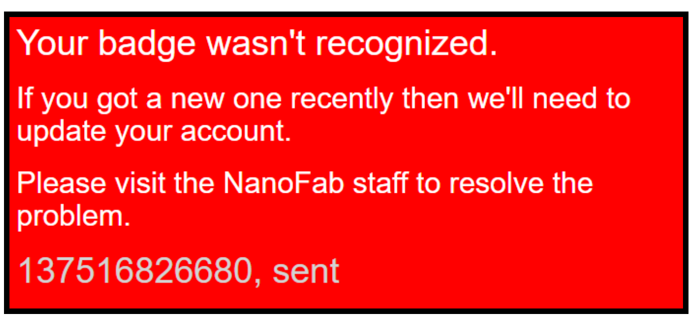


Figure 53.36: *Entrance tablet badge error*

CHAPTER 54

Configuring NEMO

54.1 Configuring NEMO Settings

NEMO settings are maintained in the settings.py file. Additional information about the settings is available on the NEMO GitHub wiki page at https://github.com/usnistgov/NEMO/wiki/Settings.

54.1.1 Authentication Backends

The AUTHENTICATION_BACKENDS key is used to select the between a decoupled “REMOTE_USER” method such as Kerberos from a reverse proxy and LDAP authentication from NEMO itself.

54.1.2 Templates

The context processors in the templates section of settings.py determines if the logout button is displayed or not. Uncomment the desired processor.

- 'NEMO.context_processors.hide_logout_button', will hide the logout button on the navigation bar.
- 'NEMO.context_processors.show_logout_button', will show the logout button on the navigation bar.

54.2 Identity service

The identity service can be used to connect to external resources such as billing systems or access control systems. The identity service requires the user to create an intermediary service to act as a go between for NEMO and the service.

54.3 NEMO Timed Services

A few features require periodically polling NEMO to trigger events which can be done in two ways, by web request or management command.

54.3.1 Web request

The user that connects must have the 'NEMO|user|Can trigger timed services' permission or the connection will be refused. Make a GET request to trigger the service.

- Email usage reminders – typically runs every hour,
  `<site-address>/email_usage_reminders/`

- Reservation reminders – typically runs every 15 minutes, `<site-address>/email_reservation_reminders/`
- Reservation ending reminders – typically runs every 15 minutes, `<site-address>/email_reservation_ending_reminders`
- Scheduled outage reminders – runs every minute, `<site-address>/email_scheduled_outage_reminders`
- Missed reservations – runs every minute, `<site-address>/cancel_unused_reservations/`
- Out of time – runs every minute, `<site-address>/email_out_of_time_reservation_notification/`
- Weekend access – runs every hour, `<site-address>/email_weekend_access_notification/`
- Automatic alert creation for closures – typically runs every day, `<site-address>/create_closure_alerts/`
- Tool qualification management – runs every day, `<site-address>/manage_tool_qualifications/`
- Access expiration reminders – runs every day, `<site-address>/email_user_access_expiration_reminders/`
- Recurring charges management – runs every day, `<site-address>/ manage_recurring_charges/`
- Sensor data management – runs every minute, `<site-address>/manage_sensor_data/`
- Email contract reminders – runs every day, `<site-address>/email_contract_reminders`

- Area auto logout users – runs every minute,
  `<site-address>/auto_logout_users`

- Check and update waitlist – runs every minute,
  `<site-address>/check_and_update_wait_list`

- Deactivate users with access expired – runs every day,
  `<site-address>/deactivate_access_expired_users`

- Email interlock usage report – runs every day,
  `<site-address>/email_interlock_status_report`

54.3.2 Management command

Management commands can be run directly on the NEMO server and eliminate the authentication and HTTP overhead. Run the required service using “python manage.py <service-name>” or “django-admin <service-name>”.

- Email usage reminders – typically runs every hour,
  `send_email_usage_reminders`

- Reservation reminders – typically runs every 15 minutes,
  `send_email_reservation_reminders`

- Reservation ending reminders – typically runs every 15 minutes,
  `send_email_reservation_ending_reminders`

- Scheduled outage reminders – runs every minute,
  `send_email_scheduled_outage_reminders`

- Missed reservations – runs every minute,
  `cancel_unused_reservations`

- Out of time – runs every minute,
  `send_email_out_of_time_reservation_notification`

- Weekend access – runs every hour, `send_email_weekend_access_notification`
- Automatic alert creation for closures – typically runs every day, `create_closure_alerts`
- Tool qualification management – runs every day, `manage_tool_qualifications`
- Access expiration reminders – runs every day, `send_email_user_access_expiration_reminders`
- Recurring charges management – runs every day, `manage_recurring_charges`
- Email contract reminders – runs every day, `send_email_contract_reminders`
- Sensor data management – runs every minute, `manage_sensor_data`
- Area auto logout users – runs every minute, `area_auto_logout_users`
- Check and update waitlist – runs every minute, `check_and_update_wait_list`
- Deactivate users with access expired – runs every day, `deactivate_access_expired_users`
- Email interlock usage report – runs every day, `send_email_interlock_status_report`

For example, to process missed reservations, run: “python manage.py cancel_unused_reservations” or “django-admin cancel_unused_reservations”

54.3.3 Systemd tasks

Examples of systemd tasks for each of the timed services is available in the resources/systemd folder. The scripts make use of the docker command and assume the container running nemo is named “nemo”. Feel free to adapt those to your specific needs.

54.4 Email logging

All emails sent by NEMO are logged for audit purposes and accessible in Detailed administration → Email logs. If you are a developer, make sure to use the send_email function available in utilities.py to benefit from this feature.

CHAPTER 55

NEMO Release notes

55.1 Release 7.0.1

Improvements

- Added Training email category
- Updated tool credential detailed admin list to include password
- Restricted list of staff that can be allowed to view tool credentials to only "active" staff

Bug fixes

- Fixed username display in tool freed time notification
- Fixed a few html/js/css display issues
- Fixed old reference to NEMO 6.1.0 (instead of 7.0.0)
- Fixed help text on document display order

55.2 Release 7.0.0

Breaking changes

- Dropped support for python 3.8 (end-of-life was reached in October 2024).
- Added support for Python 3.13.
- Removed dependency on `pytz` which is deprecated. Plugins will have to manually add that requirement it if they need it.

Upgrade notes

- This is a major release. It is recommended to wait until new compatible plugin versions are released before updating.
- The code for sensors has been moved to its own plugin, if you were using it you need to remove `NEMO.apps.sensors` from the list of `INSTALLED_APPS` in `settings.py` and follow the instructions to install NEMO-Sensors.
- The code for contracts and procurements has been moved to its own plugin, if you were using it you need to remove `NEMO.apps.contracts` from the list of `INSTALLED_APPS` in `settings.py` and follow the instructions to install NEMO-Contracts.
- A new email template needs to be added for the tool required unanswered questions email, which can be found here.
- The `out_of_time_reservation_email` template needs to be updated to the new version which can be found here.
- The `adjustment_request_notification_email` template needs to be updated to the new version which can be found here.
- To use the new periodic interlock status report feature, add the `nemo_email_interlock_status_report` systemd service and timer available in the systemd folder.

Chapter 55 NEMO Release notes

New features

- Added new Staff assistance requests:
  - staff assistance requests have to be enabled in Customization -> User requests.
  - users can create assistance requests, which are sent to all technical staff members. Staff members cannot create assistance requests.
  - emails are sent and notifications are added in requests menu.
  - any staff can reply and mark the request as resolved.
- Tool usage counter updates (Thanks UPenn Singh Center for the contribution!):
  - added way to increase or decrease counters
  - added multiple checkboxes to decide who can reset the counter (staff/superusers/qualified users)
  - added flag to not send reset notification to facility members
- Adjustment request updates:
  - added a way to mark charges as waived and request it in adjustment requests. Thanks Cornell NanoScale Facility and MIT.nano for the contribution!
  - customizations are now in a separate section
  - requests can be linked to a charge without requiring changing one of the fields
  - users can now request adjustments for non-remote charges done on their behalf. The staff member operating the tool can also request adjustments for that same charge.

- Dynamic form updates (used in pre/post usage and reservations questions):
  - added new dynamic form question of type `radio_report_problem` to automatically report tool issues from pre/post usage questions. Thanks UPenn Singh Center for the contribution!
  - added a way to specify initial data. This is the first step toward allowing editing of questions #153.
  - added `form_row` and `row_cell` to allow customization of the form display into a grid.
  - added `inline` property to radio buttons and checkboxes to display the options inline instead of vertically.
  - added support for option groups in dropdown questions by enabling the use of a dictionary in the `labels` property:

    ```
    labels = {
      "Category 1": ["Choice1", "Choice2"],
      "Category 2": "Choice3"
    }
    ```

- Added staff activity in “My usage” page for staff to view the activities they have performed on behalf of users.
- Added readonly Detailed administration audit log to keep track of what users are doing in detailed admin. Thanks UPenn Singh Center for the contribution!
- Added interlock ping function and systemd service to get periodic reports of interlocks responding to pings. Thanks Stanford SNF for the contribution!

- Projects can now have one or multiple configurable Project types. Thanks Cornell NanoScale Facility for the contribution!

Improvements

- Updated the out of time reservation email to notify users when they are over staying. Thanks @r-xyz for the contribution!
- Added hybrid reservation + usage calendar feed option.
- Made the tool required unanswered questions email customizable in file & email templates.
- Projects are now shown in the user's page following the project selection template for consistency.
- In tool control data usage history tab, the `date` field for pre and post run data will now be called `Start date` for pre run data and `End date` for post run data.
- Added ability to customize the farewell screen page display the same way as the welcome screen.
- When there are no tools or areas, the Calendar main menu item will now be hidden.
- Added end date field when creating a reservation in the kiosk (only time was available previously). Thanks @r-xyz for the contribution!. Fixes #253.
- Now sending email with required questions when someone else forces someone off (even if they are not staff or user office).
- Updated char field length using predefined length: SMALL (100), MEDIUM (255), LARGE (1024) for consistency across NEMO.

- Now using reservation title when sending ICS calendar invites. Thanks UPenn Singh Center for the contribution!
- Added an option in customization to show the username in the tool freed time email notification. Thanks UPenn Singh Center for the contribution!
- Now showing pre/post usage data in calendar usage details.
- In Usage data history, added operator information. Thanks MIT.nano for the contribution!
- Added customization option to show tool documents in a separate tab in tool control (instead of at the bottom). Thanks MIT.nano for the contribution!
- Added option to only show qualified tools in the Kiosk (instead of all the tools the user cannot reserve/engage). Thanks MIT.nano for the contribution!
- Added `?category=` query parameter to Kiosk URL to go show only tool of a specific category. Thanks MIT.nano for the contribution!
- Added an option (in Customization -> Tool) to show who has a reservation next in tool control.
- Added new environment variables to Dockerfile to customize the container's configuration. This allows more flexibility for workers and threads:
  - `NEMO_EXTRA_PIP_PACKAGES` (to add plugins or other packages to be installed on start)
  - `GUNICORN_WORKER_CLASS` (default is `gthread`)
  - `GUNICORN_WORKER_COUNT` (default is `cpu_count() * 2 + 1` with a max of 9)
  - `GUNICORN_THREAD_COUNT` (default is `8`)

  - `GUNICORN_KEEPALIVE_SECONDS` (default is `300`)
  - `GUNICORN_CAPTURE_OUTPUT` (default is `True`)

- In Detailed administration -> Email logs, added the date when email was sent in the detailed view.
- Now displaying project PIs in Detailed administration -> Projects
- Added new type of AdminEmailHandler for django to limit the number of error emails sent within a certain timeframe. This option can be configured in `settings.py` using `LOGGING_ERROR_EMAIL_PERIOD_SECONDS` and `LOGGING_ERROR_EMAIL_MAX_EMAILS`.
- Added a new option for using tools, for “training”. This new mode will automatically take the trainer to the “record training” page in NEMO and link the usage event back to the training after it is successfully recorded. The usage event will also have a `training` field set to True when it was used for training. Thanks MIT.nano for the contribution!
- Added `critical` flag in app config so NEMO doesn’t start if there is a plugin is set as critical and has an error on startup.
- Added an option to automatically shut down a tool when a safety hazard is reported, even if the shutdown flag on the report is not True. Thanks Cornell NanoScale Facility for the contribution!
- Added json dictionary of extra arguments for interlock cards. For modbusTCP implementations, the “timeout” key/value can be specified as the timeout for the connection. Thanks MIT.nano for the contribution!
- Improved highlighting for required questions in Dynamic forms. Thanks @r-xyz for the contribution! Fixes #256.
- Added new autocomplete widget for admin fields.

- Added new `NEMO.plugins.utils` python file with utility functions for plugins. Added a function to dynamically add new notification types.
- Added an `enable` flag on reservation questions.
- If an SMTP connection error is detected (AuthenticationError, ConnectError or ServerDisconnected) when sending an email, NEMO will automatically retry it once.
- Added utility function to rename files in storage when their name depends on the tool name (for example tool image) and that tool name is updated in NEMO. Previously those files would keep the old name forever.
- Added links to projects from User's page and links to users from Project's page. Thanks Stanford SNF for the contribution!
- Added new maximum future reservations policy for tools and areas. Thanks MIT.nano for the contribution!
- Added options to always notify the person who has a reservation next when the current reservation is shortened. Thanks MIT.nano for the contribution!
- Added a "Control" button in mobile calendar view to easily switch to the tool control page for that tool. Thanks Cornell NanoScale Facility for the contribution!
- Added tool status icon in mobile calendar view. Thanks Cornell NanoScale Facility for the contribution!

API

- Removed pagination on readonly API endpoints (Permission, Content-Type,) to be consistent with other API endpoints.

- Added serializer field for MultiEmailField, so it can be handled properly in the API.
- All charge types (UsageEvent, AreaAccessRecord, ConsumableWithdrawal, StaffCharge, TrainingSession, Reservation) now have `waived` and `waived_by`fields.
- Added user documents to API. Thanks @r-xyz for the contribution!
- Added a `/metadata` endpoint to provide information about NEMO's version, plugins and packages installed, os version etc.
- Added a `/api/media/<path>` endpoint to serve media files directly from storage.
- Fixed wrong api filters for `weekdays_start_time` and `weekdays_end_time`, datetime filters were used instead of time only filters.
- Added project types endpoint.

Bug fixes

- Fixed tool configuration options not being ordered properly (now ordered by configuration display order).
- Fixed adjustment request link not showing in email template sent to users.
- Fixed impersonate permission not working for anyone else than admins. The feature will now work for anyone given that permission but they can only impersonate someone with a lower role: Admins can impersonate everyone, Facility managers can impersonate everyone except admins, and staff members can only impersonate regular users.
- Removed links on footer for Kiosk and Area access pages which would allow users to access NEMO as the kiosk user.

- Allow relative path to work for landing page choices when NEMO is deployed on a subpath. Thanks @r-xyz for the contribution!. Fixes #249.
- Removed dependency on `distutils` which is not a part of standard python library anymore.
- Added timeout on tool information tooltip in Kiosk pages to prevent it from staying open after the user's session times out. Thanks @r-xyz for the contribution!. Fixes #246.
- Fixed a bug when NEMO would throw error 500 instead of returning a bad request (400) when an exception happens when looking up comments and tasks.
- Now emailing tool problems to qualified users as BCC instead of exposing their emails to everyone.
- Fixed reservation policy issues when policy is off during weekdays and weekend:
  - reservation time during off hours is not taken into account anymore when checking reservation rules (if reservation time overlaps with off time).
  - reservations scheduled during off hours are also not taken into account when calculating total reservation time in the future and reservation count per day.
- Fixed validation issues not being displayed in Broadcast email form.
- Fixed bug preventing tool notifications from being sent correctly to all qualified users.
- Fixed a bug allowing duplicate usage events, area access records or reservations to be created at the same time by adding locks that are

thread safe and worker safe, as well as adding the `preload_app = True` setting in Gunicorn.

- Fixed the inefficiency of the method used to set alerts as expired. It used to mark all previous alerts as expired even if they already had the expired flag on.
- In Calendar when more information is needed to create a reservation/outage, fixed the logic that is sending the additional parameters so it overrides previous ones instead of appending to them. This was only really an issue when sending lists of parameter values.
- Fixed incorrect redirect parameters when using mobile calendar view.
- The Jumbotron will no longer throw a 404 when it has no watermark.

Libraries

- cryptography -> 44.0.1
- Django -> 4.2.19
- django-filter -> 25.1
- drf-excel -> 2.5.2
- Pillow -> 11.1.0
- packaging -> 24.2
- pymodbus -> 3.8.6

55.3 Release 6.0.3

Bug fixes

- fixed issue with task notification being sent from the last qualified user instead of the reporter

Libraries

- django 4.2.11 -> 4.2.15 (vulnerability)

55.4 Release 6.0.2

Bug fixes

- fixed error with first day of the week format for moment.js which created issues with daterangepicker in sensor data pages

55.5 Release 6.0.1

Bug fixes

- fixed a bug from Django 4.2 upgrade preventing rates from being loaded correctly on start
- fixed a validation bug in dynamic form with formula type questions

55.6 Release 6.0.0

Upgrade notes NEMO 6.0.0 includes a major update to NEMO's underlying framework (Django 3.2 -> 4.2), and the following changes need to be made:

- add to settings.py:

```
CSRF_TRUSTED_ORIGINS = ["https://{}".format(ALLOWED_HOSTS[0])]
# or directly CSRF_TRUSTED_ORIGINS = ["https://nemo.example.com"]
```

- the unauthorized_tool_access_email template needs to be updated to the new version which can be found here

New features

- Added a new Tool credentials page for staff, allowing administrators and staff with permissions to add/edit and search tool credentials (username/-passwords). Tool credentials are shown to staff by default in the Tool control -> Details tab but require the user to expand the section to see the actual information (for privacy).
- Added a user profile view which, if enabled in Customization -> Users, will allow users to see their profile by clicking on their name in the navigation bar. The user profile contains user's general information, projects, area access levels and tool qualifications (Thanks @Valilian of UC Irvine for the contribution!).
- Added support for consumable withdrawal adjustment requests

Improvements

- Project usage and project billing will now allow to search for inactive users
- Added an option to hide inactive projects when looking at a specific account page in Customization -> Projects & accounts.
- Added confirmation dialog when marking an adjustment request as applied.
- Automatically adding tool owners, backup owners and superusers when sending a email to all qualified users (in case they are not explicitly qualified).
- Added option to require selecting a user type when creating a new user.

- Training can now be enabled for some specific hidden tools in Customization -> Training (Thanks @r-xyz for the contribution). #221
- Added settings to allow tool problems and updates to be sent to users if they add them in preferences. only qualified tools are allowed (Thanks UPenn Singh Center for the contribution!).
- In user's page, added the last access date for each area access levels. None will be displayed in red color if the user has an area access that they never used.
- Personal schedule can now be selected in the calendar to be displayed in the same view as tool reservations (Thanks UPenn Singh Center for the contribution!).
- Added an option to sort tools in status dashboard by time of use instead of name (Thanks Stanford SNF for the contribution!).
- Added an option in email broadcast to send the message to users with expired access (false by default)
- Max delayed logoff time can now be customized per tool. It replaces the previous checkbox. Any tool that previously allowed delayed logoff will be automatically set to 120 minutes which was the hardcoded value until now.
- Added title for contact information people. #195

API

- Added recurring consumables, physical access levels, buddy requests, temporary physical access requests and adjustment requests endpoint.
- Missed reservation adjustment can now be applied (if times are changed, new times will be applied, and if no times are changed, the reservation will be changed to not missed).

- Simplified API filters in the code for easier maintainability and consistency.

Bug fixes

- Reservation ending email reminders will not be sent anymore when the user has back to back reservations (Thanks @r-xyz for the contribution!).
- Fixed the first day of the week not being consistent when using datetime pickers (Thanks @r-xyz for the contribution!). #231
- Fixed invalid dates when selecting blank option as a month in my usage/project billing pages. #235

Libraries

- Django 3.2.25 -> 4.2.11
- cryptography 42.0.5 -> 42.0.8
- requests 2.31.0 -> 2.32.3

55.7 Release 5.6.1

Bug fixes

- fixed an issue when reporting an problem or comment in the kiosk would not use the correct user

55.8 Release 5.6.0

Upgrade notes

- To use the new automatic deactivation when a user's access expires, a new timed services need to be added, nemo_deactivate_access_expired_users Systemd services are available in the systemd folder

55.9 Release 5.5.3

Bug fixes

- fixed a bug with model instance copies that interfered with the new version of auditlog

55.10 Release 5.5.2

Improvements

- added name field to interlock to provide more flexibility for naming them
- changed default date range for project usage to the current day instead of the current month (which could take a long time to load)

55.11 Release 5.5.1

Bug fixes

- fixed a bug when trying to upload project and user documents (display_order field needed a default value)

55.12 Release 5.5.0

Upgrade notes

- IMPORTANT ORACLE users only: due to a bug in the third party library auditlog, you need to follow instructions for 2 step migration highlighted here: https://django-auditlog.readthedocs.io/en/latest/upgrade.html

- 2 timed services need to be added, nemo_check_update_wait_list and nemo_email_usage_reminders for the new tool waitlist operation mode and the scheduled outages email reminders, respectively. Systemd services are available in the systemd folder
- 2 email templates need to be added for those features as well, in Customization -> File & email templates: wait_list_notification_email.html and scheduled_outage_reminder_email.html, available in the emails folder

New features

- Tools can now operate in 3 modes: regular/waitlist/hybrid (thanks JPL Microdevices Laboratory for the contribution!):
  - Regular mode is the normal/previous mode of operation and the default for all tools
  - Waitlist mode allows users to sign up on a list when someone is already using the tool, and to be notified when it's their turn. Tool reservations are not allowed in waitlist mode.
  - Hybrid mode is similar to waitlist mode except that reservations are still allowed and take precedence over the waitlist.
  - There are customization options to specify buffer times after which a spot is lost and to determine if the tool should be available if it's close to a reservation time.

Improvements

- Added settings in Customization -> Calendar to specify the time format used for the events (thanks @r-xyz for the contribution!)
- Reporting a problem and adding a comment for a tool is now available in the Kiosk (Thanks Stanford SNF for the contribution!)
- HTML is now allowed in alert contents

- In Detailed administration -> Configuration, added new column to show whether the linked tool is visible and added filter
- Added display order to documents throughout NEMO (Tool documents, User documents, Project documents, Contract documents, Safety item documents, Knowledge base documents).
- Added display order for Safety items in the same category and Knowledge base items
- Project usage will now show all usage by default when nothing is selected (selecting a user, project or application is not required anymore)
- Added scheduled outage reminders to be set on tool/area/resource outages (Thanks Polytechnique Montreal for the contribution!).
- Updated resource outage page to allow recurring outages.
- Added a “Mark as applied” button on adjustment requests to signal that the adjustment has been dealt with (Thanks Cornell NanoScale Facility for the contribution!).
- Added an “Adjust charge” button on adjustment requests to change the charge itself based on the approved dates (Thanks Cornell NanoScale Facility for the contribution!).

Bug fixes

- Fixed sensors not accepting 0 value
- Fixed dismissible alerts for users not showing the option to actually dismiss it
- Fixed validation error in transfer charges showing the exception page instead of in the form itself

Libraries

- django-auditlog 2.3.0 -> 3.0.0
- djangorestframework 3.14.0 -> 3.15.1
- Pillow 10.2.0 -> 10.3.0

55.13 Release 5.4.1

Bug fixes

- fixed icons not showing in sidebar

55.14 Release 5.4.0

This new version of NEMO does not contain any new functionality, but the codebase has been entirely reformatted using djlint. This means that from now, all code and contributions should be formatted using djlint. To make this automatic, configuration files and pre-commit hooks have been added (see below).

For developers

1. Run pip install ./[“dev-tools”] to install pre-commit, black and djlint
2. Install pre-commit hooks by running pre-commit install
3. Pull the latest version and run pre-commit run –all-files to double check (everything should pass)

Upgrade notes (Forks only)

1. Merge all changes up to NEMO 5.3.1
2. Run pip install ./[“dev-tools”] to install pre-commit, black and djlint

3. Install pre-commit hooks by running pre-commit install
4. Create a new branch in your fork git checkout -b <branch_name>
5. Run pre-commit hooks on the entire codebase pre-commit run –all-files
6. Merge NEMO 5.4.0
7. Resolve any potential conflicts by accepting your version over NEMO

55.15 Release 5.3.1

Bug fixes

- fixed calendar/tool control bug when using the search bar and it takes 2 searches to show the correct feed
- fixed capitalization in tool customization page
- fixed order of after tool logoff popups

55.16 Release 5.3.0

New features

- Added support for pre-usage questions (thanks Stanford SNF for the contribution!).
- Added support for multiple areas in area access tablet screen, i.e. a door can provide entry to more than one area (thanks UPenn Singh Center for the contribution!).
- Added new Formula type of Post usage question, allowing more flexibility when charging for consumables or for converting units based on other

fields. Formula type questions are hidden from the user and evaluated after the user answers post usage questions. They can be nested and call another formula results, and they can also be used on a group question in which case the variable becomes a list of all the values (allowing to use sum(gold_used) for example, if the user is asked how much gold they used for each of their processes).

- Added User and Staff knowledge base pages, where facilities can list documents, links, and other information for users and staff to browse (for example procedures for staff, training for users etc.).

Improvements

- Made the email preview button in the broadcast email feature scroll to the preview section.
- Now showing access expiration date in users' page.
- Tool superusers can now see the list of qualified users in tool control and there is a new customization option to display that list to everyone. #201
- Added an option (Customization -> Tools) to allow everyone to see the list of qualified users in tool control
- Added options (Customization -> Calendar) to get a confirmation dialog before creating a reservation. It can be set globally and overridden individually by users in their preferences (thanks @abuckles-uci, @crprice and Alyssa Sheffler from UC Irvine for the contribution!).
- Improved menu layout with smaller sizes. The menu will collapse into the hamburger menu when the menu items break the layout (for long names for example).
- Added staff charge info on collapsed menu bar.

- Updated most related fields in detailed admin (user, project, etc.) to use data lists instead of basic drop-downs.
- Now displaying the user's main email address in their preferences page.
- Checking for duplicate emails in email broadcast feature so it's not sent twice to the same address.
- Added support for consumable_id in post usage questions to identify consumable uniquely (since consumable name is not unique).
- Create a new impersonate permission so it can be given to specific users without the need for them to be super admins.
- Added a label on the calendar (top left corner) to show which tool/area/selection the user is looking at. #204
- Added option to only show tool documents to qualified users (thanks Polytechnique Montreal for the contribution!).
- Added option to allow everyone to email users with an upcoming reservation (thanks Stanford SNF for the contribution!).
- 0 min training records are now allowed.
- Sensor chart time x-axis formats can now be customized in Customization -> Sensor data.
- Added support for read_coils in sensors' formula (thanks UPenn Singh Center for the contribution!).
- Adjustment notifications are now automatically deleted if an adjustment is deleted.
- Added date filtering by creation time for alerts in detailed admin.

- Added training customizations to limit training to just one type, and to allow trainers to set the training date.
- Projects not allowing consumable withdrawals will not be shown in the checkout page anymore.
- Self checkout of consumables can now be limited to only certain users (thanks Stanford SNF for the contribution!).
- Badge number will not be shown anymore when badging in and out of area and kiosk. Previous behavior can be restored in Customization -> Application
- Added an option to offer the user to logout of the area they are logged in when disengaging a tool (thanks UPenn Singh Center for the contribution!).
- Projects have a new option to not allow staff charges.
- Optimized performance and load time on all pages by refactoring the queries for notifications and customizations.
- Tests will now be published to PyPi as part of the NEMO package. This will allow other plugin developers to easily run NEMO's tests.
- Now limiting the number of workers for gunicorn to a maximum of 9 to avoid issues with resources, database connections and overall performance.

API

- Fixed error with Configuration & Resource API endpoints when it would break if filtering due to many to many relationship not being supported in filters
- Tool status endpoint now requires the can view tool permission

- Updated extra fields in API (mostly related fields like users in projects, permissions etc) to not be required and allow null

Bug fixes

- Fixed a bug when reloading the qualified user list in tool control on mobile devices
- Fixed issues with some models when users are given read only permissions in detailed admin
- Fixed a major bug removing the user office role when updating their profile information in Administration -> Users
- Fixed a Kiosk issue with links in tooltip that would display NEMO's main page within the kiosk page (thanks @r-xyz for the contribution!). #202
- Fixed unique constraint on interlock Card/Channel preventing users from creating interlocks for different unit_id/bank.
- Fixed potential CSRF vulnerability when deleting a buddy request.
- Fixed multi email field issue when using the API and failing validation with empty string as value.
- Fixed inactive users not being able to be used in the usage data history filter.

Libraries

- cryptography 41.0.7 -> 42.0.5
- Django 3.2.23 -> 3.2.25
- python-dateutil 2.8.2 -> 2.9.0
- pytz 2023.3 -> 2024.1

55.17 Release 5.2.0

New features

- Users logged in outside their allowed area access (for example users staying after hours in an area when they only have business hours access) will now be shown in red in the status dashboard and other pages showing occupancy like the Jumbotron (thanks Princeton Micro/NanoFabrication Center for the contribution!).
- Added customization setting in Customization -> Calendar to show configuration settings the user picked directly in the reservation feed, similar to the Configuration agenda feed (thanks UPenn Singh Center for the contribution!).
- Added customization setting in Customization -> Status dashboard to hide projects the user is working on in the area occupancy tab (thanks Cornell NanoScale Facility for the contribution!).
- Added new broadcast email option to send an email to all Principal investigators. It can be filtered to only be sent to PIs of active projects, and can also be filtered down to a subset of selected projects (thanks Cornell NanoScale Facility for the contribution!).

Improvements

- Updated jumbotron, kiosk and area access templates to use minified versions of js and css files
- Added customization setting in Customization -> Tools -> Tool control for showing task details by default in tool control (thanks @abuckles-uci for the contribution!). #185
- Updated configuration history to include slot number in item name when using multiple settings in the same configuration

- Added users to Permission and Group in Detailed administration
- Updated reservation flow on mobile and kiosk to have the user pick a date and time before showing configuration and reservation questions, to be consistent with the desktop calendar flow (thanks Stanford SNF for the contribution!).
- Added direct link to the tool control page on the tool information tooltip displayed in the status dashboard. #191
- Optimized access request queries to improve load time on the access requests page
- Added favicon link in all base templates
- In accounts and projects page, the search results will now have [INACTIVE] before the project or account name and inactive ones will be at the bottom of the list.

API

- Added project application iexact filter to allow case insensitive search for a project by its application identifier.
- Added users to authentication permissions and groups endpoints. This allows viewing and setting the list of users through the API.
- Added users and principal_investigators to projects endpoint. This allows viewing and setting them through the API.
- Reservation's question_data field can now be null (thanks @NickiShaw for the contribution!). #194
- Added InterlockCardCategories, InterlockCards and Interlocks endpoints.
- Added /tool_status/ endpoint to return useful current tool information (thanks Cornell NanoScale Facility for the contribution!):

- id (integer)
- name (string)
- category (string)
- in use (boolean)
- visible (boolean)
- operational (boolean)
- problematic (boolean)
- problem descriptions (string: list of problems)
- customer id (integer)
- customer name (string: first name last name)
- customer username (string)
- operator id (integer)
- operator name (string: first name last name)
- operator username (string)
- current usage id (integer)
- current usage start (datetime)
- outages (string: list of current outages)
- partial outages (string: list of current partial outages)
- required resources unavailable (string: list of unavailable resources the tool fully depends on)
- optional resources unavailable (string: list of unavailable resources the tool partially depends on)

Bug fixes

- Fixed bug when searching user preferences in Detailed administration

- Fixed empty string being recorded as a valid answer for required post usage questions
- Fixed tool documents order not being respected in tool control page (reverse order of date uploaded)
- Fixed error in training when entering a wrong tool name or group name would throw an exception

Libraries

- Django 3.2.22 -> 3.2.23
- django-filter 23.4 -> 23.5
- Pillow 10.1.0 -> 10.2.0

55.18 Release 5.1.0

Upgrade notes

- Be aware that due to the reservation/configuration model changes, depending on the number of reservations and configurations in your instance, the update to NEMO 5.1.0 can take up to 10-15 minutes.

New features

- Added long awaited color-coded configuration agenda feed in Calendar! Colors are set in Detailed administration -> Configuration -> Calendar colors (thanks UPenn Singh Center and Stanford SNF for the contribution!) #165
- Added transfer of charges from one project to another. The option needs to be enabled in Customization -> Projects and accounts (thanks Stanford SNF for the contribution!)

- Added new parameters to display tool usage and/or alerts in Kiosk main page (thanks @r-xyz for the contribution!) #178
- Added Customization options to rename main menu items: Calendar, Tool Control, Safety, Requests (Thanks @abuckles-uci for the contribution!) #181

Improvements

- Allowing to change outage dates when looking at outage details in the calendar. #171
- Consumable categories are now collapsible in supplies page. They can be set to either expanded or collapsed in Customization and are expanded by default (thanks Stanford SNF for the contribution!)
- Added customization to send tool problems and updates to superusers. #173
- Now allowing 0 as a valid integer in customization integer lists

API

- Added related object names as valid filters (i.e. tool and tool_id are both valid for filtering, not only tool_id)

Libraries

- cryptography 41.0.4 -> 41.0.7
- django-filter 23.3 -> 23.4
- Pillow 10.0.1 -> 10.1.0

55.19 Release 5.0.0

- This new version of NEMO does not contain any new functionality, but the codebase has been entirely reformatted using black. This means that from now on NEMO's code will be using spaces instead of tabs, and all code and contributions should be formatted using black with the option –line-length=120
- Both NEMO and Splash Pad containers are now running Python 3.11

Upgrade notes (Forks only)

If you have a fork of NEMO, the easiest way to update is the following:

1. Merge all changes up to NEMO 4.7.1
2. Create a new branch in your fork
3. In PyCharm, change tabs to spaces in Settings -> Editor -> Code Style -> Python -> uncheck "use tab character" and install and set up black in Settings -> Tools -> Black with the –line-length=120 parameter
4. Run black on the entire *.py project files
5. Merge NEMO 5.0.0
6. Resolve any potential conflicts by accepting your version over NEMO

55.20 Release 4.7.1

Bug fixes

- Fixed calendar issue when looking at qualified tools only

55.21 Release 4.7.0

Upgrade notes

- For the area auto logout feature, a timed service action/systemd service needs to be enabled on the server. See nemo_auto_logout.service and nemo_auto_logout.timer files in the systemd resource folder
- If your are using Django Rest Framework's pagination, change the DEFAULT_PAGINATION_CLASS to "NEMO.rest_pagination.NEMOPageNumberPagination" to be able to override page size on the fly using the page_size request parameter

New features

- Added the ability to set an auto-logout time for each area. A timed service task needs to be enabled for this feature to work (thanks Cornell NanoScale Facility for the contribution!).
- Added checkboxes in calendar view to allow viewing more than one tool/area at a time (thanks Stanford SNF for the contribution!)
- Configuration agenda's near future days can now be configured in Customization -> Tools (thanks Polytechnique Montreal for the contribution!)
- Added an option in Customization -> Tools to allow tool superusers to be exempt from reservation policy rules (thanks UPenn Singh Center for the contribution!)
- A topic has been added to the email subject in the broadcast email feature. This topic will be the tool, project or account selected to send an email about. The topic is not added when more than one tool/project/account is selected (thanks UPenn Singh Center for the contribution!)

- Consumables can be set to be checked out by regular users (True by default). This only affect instances where consumable self checkout is enabled (thanks Stanford SNF for the contribution!)
- Added support for banks for NCD/ProXR interlocks and support for relay 0 to turn on/off all relays (thanks Stanford SNF for the contribution!)
- Reviewers for adjustment requests and access requests can now be set on the relevant tool/area and defaults to all facility managers if left blank. This replaces the manager's preference fields to limit adjustment requests (thanks Stanford SNF for the contribution!)

Improvements

- In status dashboard, jumbotron and tool status, now displaying the date using Django's MONTH_DAY_FORMAT setting (default to "October 9th"). See #159
- Added the ability to attach pictures when using the broadcast email feature (thanks UPenn Singh Center for the contribution!)
- Added a resizing limit for attached images when reporting a tool problem (thanks UPenn Singh Center for the contribution!)
- Added a setting to send new tool problems to all qualified users (thanks USC Nanofab for the contribution!)
- For PIs in usage page, now showing user's own usage by default, instead of all managed projects (thanks Cornell NanoScale Facility for the contribution!)
- Showing project PIs in edit user page when available
- For temporary access requests, the user office will not be cc'd anymore

- Freed time notifications will now be sent when a reservation is missed or shortened
- Added service personnel checkbox on edit user page to give users the service personnel role
- Added notes for consumables, updated user interface to show both notes and quantity left (thanks Stanford SNF for the contribution!)
- Added label support for dynamic form (post usage questions, reservation questions) for radio buttons, checkboxes and dropdown types. This allows to show different values than the one being submitted
- Added actions to enable/disabled multiple interlock and sensor cards at the same time

API

- Added exact filters wherever iexact was used
- Added filters for validated and validated_by for all charge types
- Added readonly PIs field in Projects endpoint
- When using pagination and the new NEMOPageNumberPagination class, the page size can be changed on the fly by using the page_size request parameter
- Pagination is now automatically bypassed for any requests not rendered using the Browsable API (except if the page_size parameter is used explicitly in the request). Consequently, exporting in json, excel, etc. will return all results and be less confusing.

Bug fixes

- Fixed a bug in staff status not showing closures when the closure is on the last day of the period the user is looking at

- Fixed conditional expression in tool status wrongly showing usage data history tab to staff even when no post usage questions are set (#164)
- Fixed API issue when data would not be rolled back when bulk saving users with integrity errors (non unique username for example)
- Fixed tab issue in requests not showing the correct default tab in some cases

Libraries

- cryptography 41.0.2 -> 41.0.4
- Pillow 10.0.0 -> 10.0.1 (vulnerability)
- Django 3.2.21 -> 3.2.22 (vulnerability)
- django-filter 23.2 -> 23.3

55.22 Release 4.6.3

Bug fixes

- Fixed non visible staff in staff status throwing error
- Fixed consumable withdrawal not being validated before saving them
- Fixed a bug when forcing another user out and the wrong user's reservation is shortened
- Fixed bug when managers would get notifications for adjustment requests but not see them in the list

Improvements

- Added user preferences setting for facility managers to limit areas to receive adjustment request for

55.23 Release 4.6.2

Improvements

- updated colors for status dashboard, jumbotron and occupancy

55.24 Release 4.6.1

Bug fixes

- Fixed staff status previous button not working
- Fixed customization name not allowing more than 50 characters
- Fixed case when no one could receive adjustment notifications if all managers have a restricted list of tools for adjustments (sending to all if that's the case)
- Fixed deprecated ANTIALIAS property from Pillow

Improvements

- Added Customization to not show areas in use in usage reminder notification email

55.25 Release 4.6.0

Upgrade notes

- If using the consumables/supplies self-checkout feature, a dashboard icon (landing page choice with url "/consumables/" in detailed administration) needs to be added for regular users to have a link to it (one is available in the icons folder)

- To enable the new contracts sub-plugin:
  - "NEMO.apps.contracts" needs to be added to "INSTALLED_APPS" in settings.py.
  - A timed service job needs to be created for contract reminders to be sent (an example is available in the systemd folder).

New features

- Added new contracts sub-plugin, where Service contracts, Procurements and Contractor agreements can be tracked:
  - Service contracts and contractor agreements have a reminder date and facility managers receive emails when they are due for renewal
  - Contractor agreements are linked to either Service contracts or Procurements
  - Service contracts and contractor agreements can be renewed (a new item is created with year +1)
  - Each list can be exported in CSV format
- Added an option to let user self-checkout consumables and supplies in Customization -> Application (thanks Cornell NanoScale Facility for the contribution!)
- In Area access plugin, added an option to automatically log users out when they are trying to login to the same area again, so tablets can be used for both entrance and exit (thanks UPenn Singh Center for the contribution!)
- Added tool freed time notifications, allowing users to set a list of tools they want to be notified for, when time is freed up either from a cancellation or moving a reservation. Users can set the tool list in preferences, and set the minimum time and days in the future to trigger the notifications (thanks Princeton Micro/NanoFabrication Center for the contribution!)

- Added new setting in setting.py called "NEMO_EMAIL_SUBJECT_PREFIX" to add a prefix to all NEMO related emails (thanks UPenn Singh Center for the contribution!).

Improvements

- Updated colors and contrasts, added label and better support for screen readers and accessibility in NEMO (thanks to Cornell NanoScale Facility detailed report on accessibility).
- Added task resolution time to task update emails
- Added item id in billing api
- Added option to set default badge reader configuration and fixed a bunch of issues when only using send key and not using any recording key (thanks UPenn Singh Center for the contribution!)
- Added option to retry sensor data reading before triggering a no data alert
- Added alert logs in sensor categories, limited to the last 30 alerts
- Added flag on tools to prevent qualification from ever expiring (thanks Polytechnique Montreal for the contribution)
- Optimized status dashboard loading time and made first page load asynchronous.
- Added an option in preferences for facility managers to limit tools they are receiving/viewing adjustment requests for.
- Added an option in preferences for facility managers, technical staff and service personnel to either limit or add tools they want to view maintenance records for and view task notifications for. This is particularly useful with facilities with multiple managers handling separate sets of tools (thanks UPenn Singh Center for the contribution!)

- When technical staff have a reservation and are done working on a tool, they will now be offered the option to free up the remaining time on their reservation.
- Added customization setting to allow Technical staff, User office or Accounting staff to see the details of a staff absence (type of leave, notes) in the staff status tab of the status dashboard.
- Updated NEMO references in email templates to automatically use the site title customization (thanks @r-xyz for the contribution!).
- Reservation start and end date can now be changed manually in the reservation details page (only by the reservation user or staff). Thanks @jat255 for the suggestion.

Bug fixes

- Fixed badge number issue when importing users from API (wrongly rejecting duplicates)
- Fixed bug when trying to validate an ongoing staff charge
- Fixed API file import issues when redirecting (for example when redirecting http -> https)
- Fixed sensor reading not allowing to read at address 0
- Fixed trying to open the door when no interlocks are set
- Fixed unanswered post usage question email when forced off by staff to be sent by user office email (instead of site email). Thanks @r-xyz for the contribution!
- Fixed delayed splash_pad container removal (thanks @r-xyz for the contribution!).

Libraries

- Django 3.2.19 -> 3.2.20 (vulnerability)
- cryptography 40.0.1 -> 41.0.2
- django-auditlog 2.2.2 -> 2.3.0
- django-filter 23.1 -> 23.2
- drf-excel 2.3.0 -> 2.4.0
- Pillow 9.5.0 -> 10.0.0
- pymodbus 3.2.2 -> 3.3.2
- requests 2.28.2 -> 2.31.0 (vulnerability)

55.26 Release 4.5.5

Bug fixes

- Fixed trying to increment tool counter when forcing someone off a tool
- Fixed issue when trying to disable a tool and a interlock error happens (“disable anyway” was not working)
- Fixed issue when user office staff members are not able to force a user off a tool
- Fixed issue with post usage questions not showing as empty when they should be
- Fixed issue when using mocked request (in emails) and the full url method was not working

- Fixed issue with related fields not being read correctly when using CSV api import
- Fixed adjustment request breaking when the user is staff and has an ongoing staff charge
- Fixed already adjustment charge still showing in my usage and in drop-down when creating new adjustment request
- Fixed issue when deleting sensors in detailed admin and there is too much data and the system times out

Improvements

- Added customization to show an "edit charge" button in approved adjustment requests

Libraries

- Django 3.2.18 -> 3.2.19 (vulnerability)

55.27 Release 4.5.4

Bug fixes

- fixed Server Error due to display of reservation questions.

55.28 Release 4.5.3

Bug fixes

- fixed adjustment tab issue when access requests are not enabled simultaneously

55.29 Release 4.5.2

Bug fixes

- fixed interlock being lost on tool or door save
- added setting to disable Stanford interlock reply validation

55.30 Release 4.5.1

Bug fixes

- fixed a bug with PostgreSQL when migrating and creating the news about the new version of NEMO

55.31 Release 4.5.0

Upgrade Notes

- The new adjustment request feature needs to be enabled in Customization → User request and at least one user with the facility manager role needs to exist (for approval).
- A email template for the new adjustment request feature can be found in the emails folder.

New features

- Added Tool qualification groups allowing to qualify a user on a group of tools at the same time. The feature is currently available in the Qualification and Training pages.
- Merged staff charges and remote work menu items. Both can now be found under Administration → Remote work.

- Big expansion of the REST API now allows creating new users, accounts, projects etc. Actions available in the REST API are Creation, Update, Partial Update and Deletion. Thanks MIT.nano for the contribution!
- Added adjustment requests:
  - If enabled in Customization, users can request adjustments from their usage page or from the global requests link.
  - The type of charges allowed is customizable, currently tool usage, area access and missed reservations are available.
  - Time limit for requesting adjustments is configurable and defaults to 2 weeks.
  - PIs can request adjustments for any eligible charges on their projects.
  - Adjustment requests can be exported in detailed administration and request page.
  - Adjustments can only be reviewed by facility managers.
  - If an adjustment is accepted, the user will receive confirmation, and a separate email will be sent to the User Office including optional instructions.
  - If an adjustment is rejected, the user will receive notification including optional feedback.
  - NOTE: Adjustment requests do not actually change charges. They are simply meant to allow users to create requests directly in NEMO, and adjustments should be handled outside of NEMO in the facility's own billing system.

Chapter 55 NEMO Release notes

Improvements

- Now displaying the creator of an access request when editing/reviewing it.
- Added stack trace for errors thrown during plugin loading.
- Discipline is now only used for projects and was renamed “Project discipline”.
- Including utility packages (vim, less) in the docker container.
- Major update of the Stanford interlock implementation with error checks for returned values. Many thanks to Dave Botsch from Cornell NanoScale Facility for the suggestion and all the help debugging!
- Navigation bar will now collapse to the “hamburger” menu (similar to mobile experience) on medium sized screens.
- Improved the notification model to allow for multiple notifications of the same type.
- Now allowing html in request description field (buddy requests, access requests etc.).
- Added default value for post usage questions.
- Added customization to hide tool usage data history for regular users.
- Staff availability can now be hidden from staff status.
- The Application identifier display name for projects can now be customized (to PO#, Project Id, etc.).
- Natural keys have been added for easier import/export of projects (by name), users (by username), accounts (by name) and any category type model (by name).

- Added Customization to make location and phone number not required when creating tools. Tool usage data history tab can also be hidden from regular users.
- Moved all policy rules into its own class.
- Regular users can now be given detailed admin permissions and the will have access to the administration if applicable.
- In detailed administration, locking/unlocking interlocks will now display errors.
- Added access requests export button (both in detailed admin and regular page).
- Added new “checkbox” type post usage question.
- Added a way to customize how the current setting for configuration is displayed.
- Added remote work customizations, with options to automatically charge area access when working on remote project, to explicitly ask if work on behalf of a user should be considered remote, and to enable/disable remote charges validation.
- Added a customization option to allow PIs to add/remove existing users to their projects.
- Added a CSV parser for REST API as well as a file import option.

Bug fixes

- Fixed project discipline not showing in project detail admin form.
- Fixed #135 and more (broken links telling the admin to add model instances in detailed admin but django admin app is not installed).

- Fixed #134. Thanks r-xyz for the fix!
- Fixed User office staff not being able to see access requests.
- Fixed infinite loop in authentication middleware when user doesn't have an account in NEMO.
- Fixed recurring outage across midnight not being created correctly.
- Fixed issue when reading multiple sensors at once (connection not properly closed).

Libraries

- Django 3.2.16 → 3.2.18 (vulnerability)
- cryptography 39.0.0 → 40.0.1
- drf-excel 2.2.0 → 2.3.0
- drf-flex-fields 1.0.0 → 1.0.2
- pytz 2022.7.1 → 2023.3
- django-filter 22.1 → 23.1
- Pillow 9.4.0 → 9.5.0
- pymodbus 3.1.1 → 3.2.2

55.32 Release 4.4.1

Bug fixes

- fixed modbus issue with new version of pymodbus.

55.33 Release 4.4.0

Upgrade notes

Support for Python 3.7 has been dropped. Python 3.8 or newer is now required:

- If you are using the docker image, it will be automatically taken care of.
- If you are installing NEMO using pip, you will need to update your version of python, as well as your start/stop services to point to gunicorn from python 3.8.

New features

- Added Safety as a new main menu item. Safety issues and Safety data sheets have been moved under this new section to provide a main Safety "hub" in NEMO.
- Added Safety items:
- It is a customizable list of Safety bullet points, consisting of a name, a description and (optionally) a list of documents.
- Safety items can be grouped in Safety categories.
- PDF and Video documents (.mp4, .ogv, .webm, .3gp) can be opened directly in NEMO (popup).
- All other types of documents will take the users to the link/download the file.
- Users can search through Safety items name and descriptions.
- In Customization $\rightarrow$ Safety, the Safety menu item can be hidden, as well as the Safety suggestions and SDS. Safety categories can be organized as flat/collapsible items all in one page, or as separate side sub-menu items.

Improvements

- Added update of os packages when building NEMO docker images, to guarantee the latest security patches and updates are installed.
- Allowing user office members to force a user out of a tool.

Bug fixes

- Fixed an issue on Chrome (Windows only) and Safari when clicking the back button after a spinner was shown would keep that spinner on indefinitely.

Libraries

- gunicorn 19.9.0 $\rightarrow$ 20.1.0
- cryptography 38.0.4 $\rightarrow$ 39.0.0
- Pillow 9.3.0 $\rightarrow$ 9.4.0
- pymodbus 2.5.3 $\rightarrow$ 3.1.1
- pytz 2022.6 $\rightarrow$ 2022.7.1
- requests 2.28.1 $\rightarrow$ 2.28.2

55.34 Release 4.3.2

Bug fixes

- fixed training not being recorded when click the confirm button
- fixed non technical staff not having access to staff status view options and past/future calendar
- fixed user office needing access to areas when "allow_staff_access" is set on physical access levels
- fixed user office not recognized as staff in occupancy screens

55.35 Release 4.3.1

Bug fixes

- fixed csrf token issue on tool qualification customization.

55.36 Release 4.3.0

Upgrade notes

- New User Office and Accounting Officer roles have been added. They allow a greater level of granularity in NEMO. Consequently, Staff users won't be able to edit user information or see the billing information for other users by default. To give a user any of the new roles, go to Detailed Administration → Users select the user and check the User office or Accounting officer checkbox and uncheck the Staff box. More information can be found in the feature manual.

- A cron job for access expiration email reminders needs to be enabled for the feature to work. A systemd version for docker is available in the systemd folder.

- A cron job for managing tool qualifications needs to be enabled for the feature to work. A systemd version for docker is available in the systemd folder.

- A cron job for managing recurring charges needs to be enabled for the feature to work. A systemd version for docker is available in the systemd folder.

New features

- Added recurring consumable charges, which allows charging users for the same consumable at a given frequency. For example, charging user for renting user bins every year.

- Recurring charges can be exported (including potential errors)
- The quantity can be forced to a certain number in customization (for example when it should only and always be just one)
- The recurring charges can be locked so non facility managers can only assign them to user and not change the frequency or linked consumable.
- A consumable category can be set in customization to limit recurring charges to only consumables belonging to that category.
- Validating customers (inactive, access expired, etc.) can be deactivated for recurring charges in customizations.
- Users can set email reminders for their recurring charges in User preferences.

• Added Tool qualification expiration to remove tool qualification from users after a certain number of days. It needs to be enabled in Customization → User. An example of the email template can be found here. There are 2 separate cases that can be customized:

- Number of days since the user last used a tool. For example, remove tools from the user qualifications if they have not used it for 6 months.
- Number of days without using a tool since the user was trained on that tool. For example, remove tools from the user qualifications if they haven't used it in the 2 weeks after being trained on it.

• Added Access expiration reminder email to remind users a certain number of days before their access expires. It needs to be enabled in Customization → User. An example of the email template can be found here.

• Added an optional EMAIL_USE_DEFAULT_AND_REPLY_TO option in settings.py to use the default server email for all communication and setting the reply-to of the email to the actual sender. This option is helpful when using an email server that doesn't allow spoofing (for example a unique Gmail address).

- Added an optional USERNAME_REGEX option in settings.py to validate usernames.
- Added an optional MAIN_URL option in settings.py. This is useful when running multiple instances of NEMO, so all email links are sent to the same URL.
- Added audit log library that can be customized to track any changes in NEMO. See setup instructions on the wiki.
- Added a few contributions from Cornell NanoScale Facility:
  - Added Discipline, a new configurable category that can be set on projects and users (Chemistry, Electronics etc.).
  - Added Safety trainings, a new configurable list of trainings that can be checked/unchecked for each user.
  - Added Onboarding phases, a new configurable list of items that can be checked/unchecked for each user.
  - Added user and project document upload, which can be enabled in Customization → Application and Customization → Projects & accounts.

Improvements

- Added unit_id for interlocks using Modbus and added last reply time.
- Added tooltips with tool information in the status dashboard page.
- All email templates can now use global variables like site_title, facility_name etc.

- Updated autocomplete to be either synchronous or asynchronous, the ladder considerably speeding load time of pages like “Users”.
- The user search bar is now available when viewing/modifying users to facilitate switching between them.
- Consumables can now be reusable which will prevent the quantity from ever decreasing when withdrawals are made.
- Added customization in Customization → User to hide inactive user in the users page and made the modify user page go back to previous pagination page upon success. Thanks USC Nanofab for the contributions!
- Added customization in Customization → Project & accounts to hide inactive accounts, inactive projects, and to collapse the project list by default. Thanks Polytechnique Montréal - LMF for the contributions!
- Added a way to change the calendar time format in Customization → Calendar.
- Updated buttons in the entire application to have a consistent color and icon for same functionality.
- Optimized Safety Data Sheets page and added sorting by Hazard.
- Users now have the option to opt out from some of the email notifications in User preferences.
- Added Safety Data Sheets CSV export.
- Made pagination number of results per page sticky when navigating away and back. Also added an “all” option.
- Broadcast email feature now allows selecting multiple tools/areas/projects/accounts.

Bug fixes

- Fixed delayed docker container removal when stopping NEMO. Thanks r-xyz for the contribution!

Libraries

- added django-audit-log 2.2.1
- added pytz 2022.6
- cryptography 37.0.4 → 38.0.4
- django 3.2.15 → 3.2.16 (vulnerability)
- django-auditlog 2.2.0 → 2.2.1
- django-mptt 0.13.4 → 0.14.0
- djangorestframework 3.13.1 → 3.14.0
- drf-excel 2.1.0 → 2.2.0
- Pillow 9.2.0 → 9.3.0

55.37 Release 4.2.1

Bug fixes

- allowed for longer file names in chemical documents (in case the chemical name is pretty long)
- fixed issue with rates table not being expanded/collapsed correctly
- fixed CSS for rates table title
- fixed fullcalendar flickering when events are reloaded

55.38 Release 4.2.0

New features

- Added Safety data sheets:
  - ChemicalHazard (flammable, toxic, etc.) and Chemical objects should be added in the Detailed administration.
  - Chemical document can be either uploaded to NEMO or set with a URL.
  - Common hazard icons are available in the resources folder.
  - Keywords/synonyms can be set for a Chemical and search through in the Safety data sheet page.
  - There is no direct link in the navigation bar. A Landing page choice option needs to be added for this with url safety_data_sheets. An SDS icon is available for download in the resources folder.
- Added a button in the calendar to only display qualified tools for non-staff users. This feature is disabled by default and needs to be activated in the Customization page. Thx pdessauw and NIST MML for the contribution!

Improvements

- Updated style of Rate table in Tool control. The table is collapsed by default and can be expanded by default by checking the box in Customization → Rates.
- Added LDAP "username_format" property to allow for custom formatting of the username.
- Checks during login are now case insensitive for username.
- Added Staff absence note which will only be visible to facility managers.

- Non-working days will not be shown as absence on the facility manager view of staff status.
- Updated display of comments in Tool control to keep new lines.

Bug fixes

- Fixed a bug preventing rates from being loaded at startup.
- Fixed a bug when running migrate of makemigrations before database is initialized.
- Fixed a bug when authentication fails and is not sending to the correct page due to not allowing POST.
- Fixed interlock configuration not accepting 0 as coil number.
- Fixed an issue where all tools would disappear when expanding/collapsing categories and switching from Calendar to Tool control.
- Fixed a ClosureTime warning on the staff status page.
- Fixed validation for reservation questions not being updated when adding/removing a group question.

Libraries

- Django 3.2.13 → 3.2.15 (vulnerability)
- drf-flex-fields 0.9.8 → 1.0.0
- cryptography 37.0.2 → 37.0.4
- django-filter 21.1 → 22.1
- requests 2.27.1 → 2.28.1
- Pillow 9.1.1 → 9.2.0

55.39 Release 4.1.2

- Updated Django 3.2.13 -> 3.2.14 (vulnerability fix).

55.40 Release 4.1.1

Bug fixes

- fixed an issue when accessing admin area access page that would try to load all access records ever created.

55.41 Release 4.1.0

Upgrade notes To enable the new sensor data plugin:

- Add ‘NEMO.apps.sensors’ to INSTALLED_APPS in your settings.py.
- Add a cron job to run every minute, either calling docker exec -it nemo django-admin manage_sensor_data or sending an http request to /manage_sensor_data.

Live demo! A live splash pad demo is now available at https://nemo.nist.gov/demo. You can find the instructions on how to use it at https://github.com/usnistgov/NEMO#online-demo

New features

- Added Sensor data plugin for temperature, humidity, gases etc.:
  - Sensor cards can be created in a similar way to the interlock cards. Currently only Modbus TCP connection is available for sensors.
  - Sensors can be added to a sensor card as well as Sensor categories to organize all the sensors.

  - Sensor data can be displayed as a graph with different date ranges and data can be exported in csv file for further processing.
  - Sensor email alerts can be set with a trigger condition or when no data is read for a sensor.

- The sensor dashboard will display sensor or categories as red when an alert has been triggered.
- Split customization settings into tabs for better readability and refactored it in a way that plugins can now add their own.
- Added option to make training required flag for new users optional (in customizations page).
- Added alternate email in user preferences (gear icon on top right corner in NEMO) as well as flags to decide which NEMO emails should be sent to the alternate email address.

Improvements

- Added landing page option flag to hide item from staff (visible to facility managers and admin only).
- Added minified version of most Javascript libraries to improve page load time.
- Date pickers will now follow the format set for DATETIME_INPUT_FORMAT, DATE_INPUT_FORMAT and TIME_INPUT_FORMAT for better consistency throughout the application. Remove Bootstrap datepicker in favor of more versatile datetimepicker.
- Added red border on required reservation and post usage questions, and on failed validation to better spot where the error is. Updated validation checks to happen on any input rather than only on required ones.

- Added new REST_FRAMEWORK API permission: 'NEMO.permissions.DjangoModelPermissions' that allows for more granular permissions. With this permission class, users need view permission on individual models (UsageEvent, Project, Account etc.) to be able to access the data in the REST API. The only exception is for accessing billing data, which requires the special use_billing_api permission to access since no models are directly associated with billing.

Bug fixes

- Fixed issue where staff status calendar was not respecting the closure staff_absent flag (always showing closure rather than only when flag is set).
- Fixed "Cancel outage" button not showing anymore.
- Users should be logged in to access any media files. Thanks r-xyz for reporting and fixing this!.
- Fixed a chicken-and-egg situation when migrating or creating migrations.

Libraries

- Django 3.2.12 → 3.2.13 (vulnerability)
- Moment 2.10.2 → 2.29.3
- cryptography 36.0.2 → 37.0.2
- Pillow 9.1.0 → 9.1.1 (vulnerability)

55.42 Release 4.0.0

Upgrade notes

- In settings.py:
  - Set DEFAULT_AUTO_FIELD = 'django.db.models.AutoField'
  - In REST_FRAMEWORK → DEFAULT_RENDERER_CLASSES replace renderer 'drf_renderer_xlsx.renderers.XLSXRenderer' by 'drf_excel.renderers.XLSXRenderer'
  - If using postgres database, replace database engine django.db.backends.postgresql_psycopg2 by django.db.backends.postgresql
- Some web browsers will cache old CSS/Javascript from detailed administration. If you are having issues (blank screens) in the admin section, try Ctrl + Shift + R or Ctrl + F5 to force a refresh or clear your browser's cache

Improvements

- Closure alert preview and validation were added to catch potential issues before the automatic alert is created.
- Closure on staff status calendar will now display the alert content if one is set.
- Added interlock card enabled field on interlock view in detailed administration.

Interlock Modbus support

- Support for Modbus over TCP was added to provide greater flexibility and support more interlock types.

Libraries

- Django 2.2 → 3.2.17

- drf_renderer_xlsx 0.4.5 $\rightarrow$ drf_excel 2.1.0
- cryptography 36.0.1 $\rightarrow$ 36.0.2
- Pillow 9.0.1 $\rightarrow$ 9.1.0
- drf-flex-fields 0.9.7 $\rightarrow$ 0.9.8
- Added pymodbus 2.5.3 as new dependency

55.43 Release 3.16.0

New features

- Added export of email addresses on broadcast email page. For use outside of NEMO.
- Added option to send broadcast email using the users default email client. This only works when the list of emails is less than 2000 characters total due to limitations of the MAILTO feature. Use the export function to get around it.

Improvements

- Tool configurations can now be enabled/disabled for more flexibility.
- Added day view option for staff status page which is also the new default view.
- Added settings in customizations to control whether users and or staff members can look at past/future staff availability and what view choices users can have (day/week/month) for more privacy control.
- Added separate Staff availability categories to allow more flexibility in ordering staff in the staff status page.

- Added user preference so users can choose their default staff status view.

Bug fixes

- Fixed a bug with tool usage counter throwing an error when being updated from post usage questions. Thanks @cnf-clark for reporting it!

Libraries

- Pillow 9.0.0 → Pillow 9.0.1

55.44 Release 3.15.0

Upgrade Notes

- For the new automatic alert creation for Closures and reminder emails on last occurrence to work, a daily cron job must be added, calling either docker exec -it nemo django-admin create_closure_alerts or by sending an http request to /create_closure_alerts.

New features

- Added Staff status, a new feature on the status dashboard displaying whether staff are in/out:
  - Leave type can be customized (sick leave, annual leave, parental leave etc.).
  - Staff working days and typical hours can be set, as well as staff categories (second shift, user office etc.).
  - Only facility managers can add/edit staff absences and see the details (sick leave, annual leave etc.).
  - Regular user and staff users only see in/out status.
  - Facility managers can also export the calendar.

  - Customizations available: show/hide weekends, display staff status only to other staff members, start week on Sunday/Monday.
  - Week/Month view.

- Renamed PhysicalAccessException to Closure and massively updated the feature:
  - A closure can now have multiple dates (to set Labor day for multiple years in advance for example).
  - A closure can triggered an automatic alert a certain number of days prior to the closure. (5 days before Labor day for example, informing users that buddy system will be in place etc.).
  - Staff can be marked as absent in the Staff status page during a closure (optional).
  - A reminder email can be sent on the last occurrence of a closure reminding facility managers to add more if needed. (In case you set Labor day 5 years in advance and then forget to add more dates).

Bug fixes

- Fixed a bug preventing XLSX export in API.
- Fixed a bug requiring the identity service to be set in settings for qualifications to work. Thanks rmwhite85 for reporting this!
- Fixed reservation details on Mobile and Kiosk only displaying times which would make it very confusing when reservations span over multiple days. Thanks nsieb for bringing this up!
- Fixed reservations losing their reservation questions when moving/resizing them. Fixes #104. Thanks jat255 for reporting it!

4 Libraries

- Django 2.2.26 → 2.2.27 (vulnerability)
- drf-renderer-xlsx 0.4.4 → 0.4.5 (fixes broken XLSX with manytomany fields)

55.45 Release 3.14.1

Bug fixes

- Fixed a wrong template name used in usage event details in calendar.
- Fixed another bug in custom task status. Thanks rmwhite85 once more!
- Fixed date format issues in user creation and abuse pages.

55.46 Release 3.14.0

Upgrade Notes

- NEMO now requires Python 3.7 since security support for 3.6 ended last month.
- The LAB_MANAGERS list in settings.py has been replaced by a permission on users called is_facility_manager. If you were using the LAB_MANAGERS setting, go to Detailed Administration → Users and set the facility managers there after updating NEMO. Also please note that you need at least one facility manager to enable the new Access request feature.
- The qualified checkbox is now enabled by default when recording training sessions. Make sure to double check before confirming.

- The access request weekend access feature (more on this below) requires a cron job to be set hourly, calling docker exec -it nemo django-admin send_email_weekend_access_notification or sending a request to /email_weekend_access_notification.

New Features

- Added temporary access. This allows admins to give users access for a limited time. For example, giving someone weekend cleanroom access for one weekend. It is available through in Detailed Administration only.
- Added user access requests:
  - Grouping Access Requests and Buddy Requests under one common “Requests” menu item.
  - Access requests (after-hours requests) need to be enabled by checking the “allow user request” box on a “Physical Access Level” in Detailed administration and by setting at least one Facility manager.
  - Added customizations for tab title, description message, minimum number of buddies, maximum number of requests to display, and weekend access emails and cutoff day and time (more on this below).
  - Once enabled, users can submit access requests by selecting a start and end time, an access level (if multiple are enabled) and a list of buddies. Facility managers (see below) are then notified and can approve/deny the request in NEMO. Upon approval, a corresponding temporary access will be created for all users in the request.
  - The request creator and buddies will receive a confirmation email, and buddies/facility managers will have a notification badge in NEMO on the requests tab indicating there is something new.
  - Facility managers can approve/deny a request and have the opportunity to update it before approving. This allows them to change the

dates, update the description etc. before approving. This is useful if for example the request can only be approved for one day due to lack of staff on the second day, etc.

– A "weekend access" customizable email can be sent to a list of emails set in customization on the cutoff day and time set. If the email template is set, the email will be sent the within an hour of the first approved request that includes weekend time with a weekend_access value of True. If no access requests that include weekend time are approved by the cutoff day and time, the same email will be sent with a weekend_access value of false. The latter will not be sent if the cutoff day and time is not set.

- Added the facility manager role in Detailed administration → Users to replace the LAB_MANAGERS settings. Facility managers receive all tasks related updates and approve/deny access requests.

- Added "Charge note". This is a text area field that can be set and updated after creating a Staff Charge. It will be displayed in "My usage", "Project billing" and "Remote work" pages as well as in the API.

- The project selection name can now be customized in the "Customization" page. It will use the Django templating engine, allowing the use of things like " project.account.name - project.name " which would display the account name followed by the project name. This is limited to project selection lists (in reservations, logging in an area, kiosk etc.).

- A standalone reservation view was added for linking from outside of NEMO, available at /event_details/reservation/<reservation_id>/. Thanks jat255 for the contribution!

- Email templates to be used in customizations were added in the resources folder. Feel free to adapt them to your needs.

Improvements

- Date and time formats have been made more consistent across NEMO and follow django's format from settings.py instead of being hardcoded in certain places. Make sure DATETIME_FORMAT, SHORT_DATETIME_FORMAT, DATE_FORMAT, SHORT_DATE_FORMAT and TIME_FORMAT are set to your liking in settings.py otherwise Django's default will be used.
- Added an EXPORT_DATE_FORMAT and EXPORT_TIME_FORMAT to settings.py to allow a custom format to be used in filenames when exporting (in API, My Usage, Tool Usage Data etc.). If not set, they will default to "m_d_Y" and "h_i_s" respectively.
- Supplies/consumables withdrawals are now allowed in group post usage questions.
- Project information can now be shown and exported in "Tool Usage Data History" through a checkbox (unchecked by default).
- The qualified checkbox when recording a training session is now checked by default.
- Fixed styling issues in the Email logs feature in the detailed administration, and also updated Customization to open the content preview in a separate tab.

Bug fixes

- Fixed a bug dating back to 2018 in custom task status using primary_tool_owner instead of primary_owner. Thanks rmwhite85 for noticing!.
- Fixed a bug when exporting usage where it would use UTC dates in the CSV file.

- Fixed a bug when user having back-to-back reservations would have one of them marked as missed when they were in fact already logged in to the area (from the prior reservation).
- Updated the misleading message when selecting projects for reservation. It will now only mention missed reservation fees if the missed_reservation_threshold field is set on the tool/area and the message will mention what the threshold actually is.
- Fixed issue when billable items would not show up in API when crossing over the period. i.e. if a charge started before the end of the month and finished the next month, it would not show up. Changed the logic to show billables by end date only.

Libraries

- Updated Django to 2.2.26
- Updated django-filter to 21.1
- Updated djangorestframework to 3.13.1
- Updated django-mptt to 0.13.4
- Updated cryptography to 36.0.1
- Updated drf-flex-fields to 0.9.7
- Updated drf-renderer-xlsx to 0.4.4
- Updated python-dateutil to 2.8.2
- Updated ldap3 to 2.9.1
- Updated requests to 2.27.1
- Updated Pillow to 9.0.0

55.47 Release 3.13.2

Bug fix

- Fixed email broadcast error when sending to users having access to an area or when sending to all users.

55.48 Release 3.13.1

Bug fix

- Fixed issue with mobile reservations breaking when the user has only one project.

55.49 Release 3.13.0

New Features

- Added support for group questions in Reservation questions.
- Added option to send an email to all registered users.
- Rest API updates:
  - Added Excel export.
    To enable it, it must be added to the DEFAULT_RENDERER_CLASSES of the REST_FRAMEWORK dictionary in settings.py, like the following:
    'DEFAULT_RENDERER_CLASSES':
    ['rest_framework.renderers.JSONRenderer',
    'rest_framework.renderers.BrowsableAPIRenderer',
    'drf_renderer_xlsx.renderers.XLSXRenderer'],
  - Added billing to the browsable API page.

  – Added link to the API in the Administration menu. Only visible for admins.

Bug fix

- Fixed an issue where sorting tools by name in the detailed admin section would break.
- Fixed multi email field validation issue where rendering would break when there was a validation issue.
- Fixed multiple issues with reservation calendar invite in Outlook where the organizer cannot be the attendee. The organizer can now be set in settings.py using RESERVATION_ORGANIZER_EMAIL and RESERVATION_ORGANIZER for the email and the name of the organizer, respectively. see the settings page for details.
- Made Customizations page only accessible to admins.

Library updates

- Updated drf-flex-fields to 0.9.3
- Updated Pillow to 8.3.2

55.50 Release 3.12.2

Bug fix

- Fixed issue with badge number not working on area access pages (already logged in and choose project pages) and kiosk "Go back" button.

55.51 Release 3.12.1

Bug fix

- Fixed issue with badge number not working in area access if they start with 0 or have letter in it.

55.52 Release 3.12.0

New Features

- Added export of tool tasks and comments history to a text file.
  Located in Tool Control -> Details -> Task and comment history.
- When creating recurring scheduled outages, the number of days in advance can now be customized in the Customization page.

Improvements

- In post usage group questions, the “Add” button text can be customized using property group_add_button_name
- Changed display of upcoming reservation on Kiosk so they don’t need to be expanded to cancel. Clicking on a reservation will go to the corresponding tool.

Bug fix

- Fixed a bug in new version of Chrome where extra scrollbars would appear and flicker on the calendar page.
- Fixed an issue with recording training sessions, where a staff member who is also a tool superuser would not be able to record training on tools he is not superuser for.

- Fixed issue when double clicking on task/comment creation/update would create multiple instances.

Vulnerabilities

- Updated drf-flex-fields to version 0.9.1

55.53 Release 3.11.0

New Features

- Added reservation questions that are asked when a user makes a reservation. They can be added in the detailed admin section. Reservation questions can be set for tools and/or areas and can also be limited to specific tools, specific areas and/or specific projects.
- Added Areas, Resources, Staff Charges and Training Sessions to Rest API.
- Added conditional nesting of related objects in Rest API as well as cherry picking of fields returned using drf-flex-fields (see link for details).
- Added a projects page for projects Principal Investigators who are not staff members. This allows them to see project information and users.

Improvements

- Added filtering by display and filtering by areas in Reservation admin page.
- Added filters to Rest API (for a complete list, see NEMO/views/api.py).
- Added a “pinned” field to news to have certain news stay at the top of the feed.

- Added optional start date for both projects and accounts. Added optional account type for accounts.
- Improved dynamic form (JSON formatted questions):
  - Added red asterisk when a field is required.
  - Added “title_html” attribute to display html in title.
  - Added “help” attribute (displaying help text for inputs).
  - Added “maxlength” attribute to textbox questions (max characters allowed in input).

Bug fix

- Fixed issues with reservation dates in ical invites not using UTC times.

55.54 Release 3.10.0

New Features

- Added “All tools”, “All areas” and “All tools & Areas” overview options in the calendar. Thanks bpedersen2 for the contribution.
- Added tool superusers who are allowed to train users on tools. They can be added in the detailed admin section, either in the user section or the tool section.
- Added a way to restrict projects to only certain tools, regardless of the users qualifications. This can be done in Detailed Administration/Project. A project restricted to certain tools will:
  - allow reservations and usage of those tools only.
  - allow reservations and login on area that this tool requires.
  - allow staff charges on those tools and areas they require.

  - allow training on those tools only.

- Added a checkbox on projects to allow consumable withdrawals or not. Consumable withdrawals set through post usage questions are always allowed.

- Added warning threshold and warning email addresses for Tool usage counter. Added corresponding email template in customizations.

- Added an area reservation ending reminder email 30 and 15 minutes before reservation ends and user is still logged in.

Improvements

- Changed user's badge number field to string (rather than integer) to get around integer max number but also to provide better flexibility with card readers.

- Added option to clear the list of consumable withdrawals.

- Added tools the user is a backup owner on, in detailed administration user page.

- Improved calendar support for making and cancellation reservations. Thanks bpedersen2 for the suggestion.

- Moved the set PI on project feature to Detailed Administration only.

- Now sending task updated email when a task is cancelled.

Bug fix

- Fixed issue where writing in a post usage question of type textarea would not update the "stop using tool" button.

- Fixed layout issues on pagination pages on mobile devices.

- Fixed an issue when multiple coincident reservations could be created at the same time.
- Fixed NEMO install_systemd_service command.

55.55 Release 3.9.2

Bug fix

- Fixed badge number max digits issue by making it a char field instead of integer. It should also provide more flexibility with badge readers.

Security vulnerability

- Fixed badge number max digits issue by making it a char field instead of integer. It should also provide more flexibility with badge readers.

55.56 Release 3.9.1

Bug fix

- Fixed a bug after updating LDAP library. TLS is not needed anymore since the LDAP connection security is set on the server connection through use_ssl (and it actually raises an error if set on an already secure server connection).

55.57 Release 3.9.0

New Features

- Added the ability to set Principal Investigators on projects. PIs are able to see all activities for the projects they manage in the “My usage” page,

- Added exporting of data in CSV format from “My usage” page,
- When forcing a user out of a tool, if there are any required unanswered post usage questions, the required questions will be sent in an email to the user, lab managers, tool owner and backup owner, and to the staff member who forced the user off. Blank answers are set in the usage history record until edited in detailed admin,
- Added float post usage question (with optional precision property) and textarea (with optional rows property).
- Added tool documents. (thanks to 4D Labs for the contribution).

Improvements

- Added options for last 10, 25, 50 and 100 records and filtering by users in tool usage data history.
- Added filtering by tool in Tool usage counter admin page.
- Improved the import of plugin URLs to be more consistent.

Bug fixes

- Fixed an issue where areas that don’t require a reservation would not show up when using staff charges.
- Updated to latest versions for all dependencies.

55.58 Release 3.8.0

New Features

- Added list views for Accounts and Projects and Users pages (thanks to 4D Labs for the contribution).

- Supplies/Consumables withdrawal can now be done in bulk. A flat list is displayed, and users can add supplies to their cart, and checkout all the items at once,
- Added a way to bypass interlock errors on both desktop and kiosk. If there is an error with an interlock command, the user will now be able to:.
  - enable anyway (so that time tracking can still take place - when staff can override interlocks manually)
  - try again
  - cancel

The “enable anyway” option can be turned on or off in customizations, and the error messages for both tool and door interlock failures can be customized as well.

Improvements

- Billing pages (billing and project billing) will now redirect to usage/project usage if billing service is not defined or not available.
- Added notification message when post usage questions are linked to consumables/supplies withdrawals so that the user is aware that they are being billed for those,
- Added 11:59pm time option for access level exception (end of the day).
- Updated resources page so resizing would not mess with the layout.
- Made required tool fields bold and capitalized in detailed admin for consistency.

Bug Fix

- Fixed issue with upcoming reservation showing when delayed logoff is in effect (#60).

- Fixed an error when creating a user would fail if identity service was not defined.
- Fixed an error when adding access level exception with blank start or end time would break (added validation).
- Added locking mechanism to enable/disable tools and area login to prevent race condition (enabling the same tool at the same time - through js or "double click").

Security

- Updated dependency version of cryptography library (due to vulnerability in previous version).

55.59 Release 3.7.0

New Features

- When a tool requires an area access, area access time will be charged when staff use tool for a remote project (so staff time, tool time and area time are all started at the same time).
- Staff charge for area access will stop when staff users log out of any area.
- Added virtual keyboard for Kiosk text post usage questions.
- Added keypad for delayed logoff on Kiosk.
- Kiosk timeout will now reset on user input.
- Added a way to contact other users from reservation details and to contact the current user of a tool on tool control page.

- Added the Buddy Board, a simple message board for buddy requests:
  - At least one area need to be set to “allow buddy system” in detailed administration for this feature to be active.
  - Users will be notified of new buddy requests with notification badge number on menu item (can be turned off in user preferences).
  - Users will be notified by notification badge number and via email when somebody also replies on a request they replied to (can be turned off in user preferences).
  - A disclaimer can be set in customizations. Use it to specify special instructions or rules for buddy system.
  - Buddy requests expire at the end of the day on their end date.
  - Only users who have completed training, have an active project and have access to the area can reply.
  - A news story will now be published when a new NEMO release is installed (with links to the release notes and the feature manual). This feature can be disabled by setting NEW_VERSION_NEWS = False in settings.py
  - All emails sent by NEMO will now be logged for audit purposes and accessible in the detailed administration. If you are a developer, make sure to use the send_email function available in utilities.py to benefit from this feature.

Improvements

- News stories can now include HTML tags (link etc.).
- Added validation for physical access exceptions in detailed admin (end date must be later than start date).

Bug Fix

- Fixed a bug where project usage page was only showing results for the current logged in user.
- Fixed a bug on Kiosk when the keypad would stay open on Kiosk timeout.

55.60 Release 3.6.0

New Features

- Added “dropdown” type for tool post usage questions.
- Added “group” type post usage question. This allows to create groups of questions that can be repeated. For example, when a user uses multiple processes on a tool, and we want to collect information about each one. More details can be found on the feature manual.
- Added “Usage Data History” tab in tool control, which displays the history of answers to post usage questions. The data can also be exported to CSV.
- Added Tool usage counters:
- They are counters linked to a “number” type post usage question and keep a running total of some user inputs.
- They can be added in the detailed administration and NEMO will check that the post usage question exists in the corresponding tool (with the correct type).
- Counters are displayed in the tool summary page.
- Counters can be reset by staff members. A comment will be added to the tool and an email will be sent to LAB_MANAGERS if that setting is enabled.

- For example, you can use it to keep track of total etch time for maintenance purposes etc.
- Added a new setting in customization to display current time indicator in the calendar.
- Added Physical Access Exceptions which allows to set specific exceptions when access levels will be denied. This can be used for holiday closures, understaffed times etc.

Improvements

- Area reservations can now be extended even while user is logged in the area (but not moved or cancelled).
- Updated calendar area login/logout buttons to be shown only when relevant (instead of being grayed out if a tool is selected for instance).
- Updated billing/usage search to use Bootstrap date picker instead of pickadate.
- Updated validation on post usage questions to check that consumable exists with the correct name, and that required attributes are provided.
- Added management commands to run timed services. (you can now use manage.py or django-admin to run timed services actions).
- Added keypad for answering post usage questions of type number (only on Kiosk).

Bug Fixes

- Fixed an error when using the search feature in physical access log (in Detailed Administration).
- Fixed excessive load time when selecting a reservation in Detailed Administration.

- Fixed #43 unique constraint violation in Postgres, thanks to bpedersen2.

Security

- Updated dependency version of cryptography library (due to vulnerability in previous version).

55.61 Release 3.5.0

New Features

- Added a way to link contact information to an actual user (through Detailed Administration\Contact Information). When both are linked, in Tool Control details page, the contact information will be displayed (instead of simply the email) of the tool owner or backup owner.

Improvements

- Area reservation policies: user cannot cancel area reservation while logged in that area during that reservation. Also, users won't be able to cancel or move an area reservation when they have tools reservations that require that area reservation.
- Added post usage question validation and better error message for required attributes.
- Consumables can now only be withdrawn if the post usage question is of type "number".

Bug Fixes

- Fixed a bug preventing tool synchronization feature to work.
- Fixed a bug in tool admin page, when missing required attributes of post usage questions would completely break the page.

- Fixed a bug where selecting Facility Usage in calendar view would display ALL tool usage even when selecting a particular area.
- Fixed a bug when a tool needed to be shutdown and the wrong email was sent to users.

55.62 Release 3.4.0

New Features

- Added the ability to create more badge reader configuration in detailed administration. When using the Kiosk or Area Access, add ?reader_id=<reader_id> to the URL to select a badge reader configuration.

Improvements

- Added ability to search by user in project billing.
- Added user information on Usage Events in usage page.
- Hiding project billing if billing service isn't defined.

Bug Fix

- Fixed an error when not all areas would show up on the email broadcast page.
- Fixed out of time email being sent when customer has back to back reservations.

55.63 Release 3.3.0

New Features

- Added service personnel to NEMO: service personnel can access **authorized** areas without having a reservation and use **qualified** tools even when shutdown or during outages.
- Added checkbox to count service personnel in area capacity or not.
- Added supply reminder email: a reorder email will be sent when supplies fall below the defined threshold.

Improvements

- Improved the staff charges page to show more details: customer being charged staff time, area access and tool usage on behalf of that user.
- Improved resources page to be easier to navigate. Added a resource details page where the user can schedule an outage and modify the resource availability.

Security

- Updated Pillow library to latest stable version.

Bug fix

- Reservations were not marked as missed if the email template wasn't defined. Fix it so that reservations would be marked as missed regardless.

55.64 Release 3.2.7

Bug Fix

- Fixed a broken link when selecting tool on mobile.

55.65 Release 3.2.6

Bug Fix

- Fixed an issue in the kiosk where upcoming reservations would include area reservations and trying to display tool_id would fail.

55.66 Release 3.2.5

Bug Fix

- Fixed an issue with platform specific formatting (was causing issues on Windows).
- Fixed an issue when enabling a tool would not work if the user id contained a specific number.

55.67 Release 3.2.4

Bug Fix

- Fixed an issue with overlapping reservations not being counted correctly towards capacity.

55.68 Release 3.2.3

Bug Fix

- Fixed a small UI issue where calendar/tool control would not show up correctly when impersonating.
- Fixed an issue where Jumbotron would try to show tool usage info when no tools are set up.

55.69 Release 3.2.2

Bug Fix

- Fixed an issue with impersonating (couldn't go back in some conditions).

55.70 Release 3.2.1

Bug Fix

- Fixed an issue when rest_framework isn't installed.

55.71 Release 3.2.0

New Features

- (**Administrators only**) Added the ability to impersonate other users. Located in the administration dropdown menu. You'll need to add 'NEMO.middleware.ImpersonateMiddleware', to settings.py for this to work.
- Default user reservation preferences can be overridden in settings.py with USER_RESERVATION_PREFERENCES_DEFAULT = True.

Bug Fix

- Fixed a bug where access usage was not showing when clicking on areas in sidebar.

Improvements

- Removed hard coded URLs which cause issues when deploying using subpath.

- Added success message when saving user preferences.
- Fixed authentication issues when using multiple authentication backends (especially when mixing pre-auth backends and backends using login page).

55.72 Release 3.1.2

Bug Fix

- Fixed an issue when staff cancels another user's reservation and the email is not sent to the additional reservation emails set on the area.

55.73 Release 3.1.1

Re-releasing 3.1.0 as 3.1.1 to fix docker tag issue.

55.74 Release 3.1.0

New Features

- A reservation email (or a list) can now be set on areas. Any reservation created or cancelled will be sent to that email with an .ics calendar invite attached (in addition to the user).
- An abuse email (or a list) can now be set on areas. When a non-staff user overstays (reservation expired but still logged in the area) an email will be sent to that email (in addition to the user).

Improvements

- Now using foldable trees in views where areas can be selected (self login, area access login, and physical access in user form)..

- Added email previews and link to download current content in customizations.

Note For the abuse and reservation emails, NEMO will send the emails “all the way up the tree”. So if you have a setup where Campus contains Buildings which contains Offices, then when a reservation is created in an office, the email will be sent to the email for the Office, and the email for the Building (if set) and the email for the Campus (again, if set) etc. same goes for overstays.

55.75 Release 3.0.1

Bug Fix

- Fixed a bug when counting occupancy.

55.76 Release 3.0.0

NEMO 3.0.0 is here with area reservations!

Before Updating

- Add mptt to INSTALLED_APPS in settings.py.
- Add timed services call to url /email_out_of_time_reservation_notification every minute.
- If you plan on using area reservations, update reservation email templates to check whether the reservation item is a tool or an area. reservation.tool, reservation.area or reservation.reservation_item and reservation.reservation_item_type can be used for that. (emails to update area: reservation_reminder_email, reservation_warning_email, missed_reservation_email, cancellation_email, reservation_created_user_email, reservation_cancelled_user_email).

- If you plan on using area reservations, update unauthorized_tool_access_email to use the new type variable. It can be either 'reservation' when a user tries to use a tool without a reservation or 'access' when a user tries to use a tool without being logged in to the required area.

New Area Features

- Added the ability to make reservations for Areas that have requires_reservation set to True.
- Added icon on tools in the sidebar when they require access to an area that requires a reservation.
- Tools cannot be reserved until a reservation is made on the required area (area reservation needs to exist at the start time of the tool reservation).
- Added Area capacity and policy rules for area reservations. Area capacity is checked when making reservation and logging in, parent area capacity is also checked. (Capacity can be set on buildings or campuses that have other areas in them as well).
- Warning will be shown to user when making a reservation if reservation_warning is set on an area.
- Added categories to area.
- Added count_staff_in_occupancy flag on areas. If unchecked, staff users will not count.
- Added customization setting to display all areas or only areas the user has access to.
- Access levels can now be set directly when creating the access level.
- Access level can be given on parent areas (i.e. Buildings).

- Outages can be scheduled on Areas as well. Can also be set on parent area through the detailed administration.
- Added tooltip showing all users logged in an area.
- Added ability to log in and out of areas directly from the calendar view (enable with setting in customization).
- Logged in users without a reservation will be shown in red on status dashboard.
- Area reservation are shortened when user logs out.
- Added ability to email users authorized to access an area or parent area (building).
- Displaying scheduled outages and unavailable resources for areas in sidebar.
- Added mobile calendar area reservations.
- Added email to be sent when users are out of time (logged in area but reservation expired). A grace period can be set in area.

55.77 Release 2.3.4

Bug fix

- Fixed a bug preventing disabling tools from kiosk.

55.78 Release 2.3.3

Security vulnerability

- Updated django version.

55.79 Release 2.3.2

Bug Fix

- Fixed a bug with reservation warning.

55.80 Release 2.3.1

Bug Fix

- Fixed a bug with facility usage events not showing in calendar.

55.81 Release 2.3.0

Before Updating

- Replace 'NEMO.context_processors.device' with 'NEMO.context_processors.base_context' in context_processors in settings.py.
- Rename media file nanofab_rules_tutorial.html to facility_rules_tutorial.html and update form in file to post to facility_rules URL.
- Rename media file nanofab_rules_tutorial_email.html to facility_rules_tutorial_email.html.

New Features

- Added a reservation warning (number) field to Area. A "Busy time" warning will be displayed when reserving a tool in that Area when there already are a greater number of users with reservations for that same area. (This can be used separately from the area capacity).
- Added a Boolean field in area to decide if staff should count towards max capacity. Updated pages to show a separate staff count if unchecked.

- Post usage questions now support number type and min, max and pattern attribute.
- Post usage questions preview has been added as well.
- Consumable withdrawal now subtracts from quantity.
- In email page, subject and content are now required and the preview can now be updated before sending.
- Added area access record in remote work for staff charges.
- Self login button will now be shown all the time when enabled from customization. Errors will be displayed when user cannot login (rather than hiding the button).
- User type isn't required anymore. Confirmation of user creation/update has been added and another safely deactivate user link was added next to the active checkbox.
- The facility name can now be configured from the customization page. Thanks dsbarth for the original code!
- The site name can also be configured from the customization page.
- The calendar view can now be configured from the customization page (default view, first day of the week, start of the day, column date format for day, week, and month views). Thanks sbonaime for the suggestions and help!

Improvements

- Added a spinner in tool control page when waiting after clicking on tools.
- Past outages aren't shown on scheduled outage page anymore.
- Added staff charges to billing api. Added detailed information for items.

- Made identity service optional in settings.py.
- Made no_header feature sticky (per session): use parameter no_header=True in page URL to use NEMO without header bar, use no_header=False to turn it off.

Bug fixes

- Added consumable withdrawal on Kiosk after answering post usage questions.

55.82 Release 2.2.3

Bug Fix

- Fixes #32 (mix up between access levels and areas in area access record page).

55.83 Release 2.2.2

Bug Fix

- Fixes #33.

55.84 Release 2.2.1

Bug Fix

- Fixes #32

55.85 Release 2.2.0

Improvements

- Improved LDAP settings to allow users to specify port, bind credentials, dn search and more.
- Improved interlock implementation interface, allowing to validate both interlock card and interlock objects.
- Updated tool autocomplete results to have better spacing.
- Updated Jumbotron to not display areas when none are defined.

New Features

- Users can now change the project on an upcoming reservation.
- Added comments that only staff can see (and create).
- Added ProXR interlock implementation (contribution by 4Lowe at the Minnesota Nano Center).
- Added rates to customizations. Labs can now upload a json file containing rates for tools.
- Added authorization failed to customizations. Labs can personalize the error message shown when login failed.
- Added jumbotron watermark to customizations.
- Made tasks and comments searchable.
- Added notification icon and statement when scheduled non required resource is not available.
- Added tool config history tab (in tool control).

- Added max capacity for areas.

Bug fixes

- Fixed an issue where staff needed to select a project when making reservations on desktop site (didn't need to in mobile). Now it doesn't ask for project either way (staff are not charged for missed reservations, so no projects needed).
- Fixed a few typos here and there.

55.86 Release 2.1.1

Bug Fix#24

- Fixed error when image was being resized and removed then saved again (when no changes were made on the file).

55.87 Release 2.1.0

New Features

- Added Tool image, serial and description. Thanks sbonaime for the contribution.
- In Kiosk, categories and tools that a user is not qualified to use will be grayed out.
- Added checkbox in Physical Access Level to grant access to staff without have to do it explicitly.
- Added categories to alerts, and updated alerts to keep them after they are deleted or expired.

- Only showing visible tools on resource pages.

Improvements

- Updated Ldap authentication to provide better logging and not require certificate.
- Updated NEMO's configuration to work without django admin installed.
- Added version number to Jumbotron, Kiosk and Area Access pages.
- LAB_MANAGERS will now receive an email when a task is created (not just updated).
- Added training sessions to billing API.
- Updated plugin feature so that URLs are automatically added when plugin name starts with 'NEMO'.
- Added name to interlock cards.

Bug Fix

- Fixed user history when history item had been deleted.

55.88 Release 2.0.1

Bug Fix

- Fixed wrong migration filename.

55.89 Release 2.0.0

NEMO 2.0 is here!

Chapter 55 NEMO Release notes

This major release is focused solely on internal improvements and library updates. no changes have been to features or user interface.

Plugin Development

- A big effort has been made to facilitate plugin development in NEMO. See the Plugin Development wiki page for detailed instructions and examples.

Improvements

- Updated to Django 2.2 (LTS version with extended support until April 2022), requests 2.22, django rest framework 3.11, and to latest version of all the other libraries (cryptography, django-filter, ldap, pillow and dateutil).
- Added JSON validation for post usage questions. Thanks sbonaime for the contribution!

Before Updating The Kiosk and Area Access features of NEMO have been moved into internal plugins. If you were using them, you'll need to add them to INSTALLED_APPS of your settings.py file:

- 'NEMO.apps.kiosk',
- 'NEMO.apps.area_access',