squeaks™

users guide

SQUEAKS V 3.0

DOCUMENT R3

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Contents

Overview

This documents provides an overview of the SQUEAKS product for a new end user of the product. The document covers the process of logging into the application for the first time, as well as showing the user around the application and explaining the features of SQUEAKS. For an overview of the configuration process as well as advanced configuration options see the **SQUEAKS Administrators Guide.**

Logging In

Open a web browser. In the URL bar, type the URL to the SQUEAKS server to reach the SQUEAKS log in page. Normally this is the name of the server that SQUEAKS is installed on. The SQUEAKS website URL uses the following format: http://{servername}:{port}. By default, the SQUEAKS website is hosted on port 80. If the default was kept during setup, the port does not need to be specified. Depending on the network setup, the server name may need to be replaced with the IP address of the server. Contact the SQUEAKS Administrator if the SQUEAKS server URL is unknown or inaccessible.

> NOTE | **SQUEAKS is compatible with all major web browsers as long as the version is one of the two latest releases.**

The initial username and password are provided in the User's invitation email.

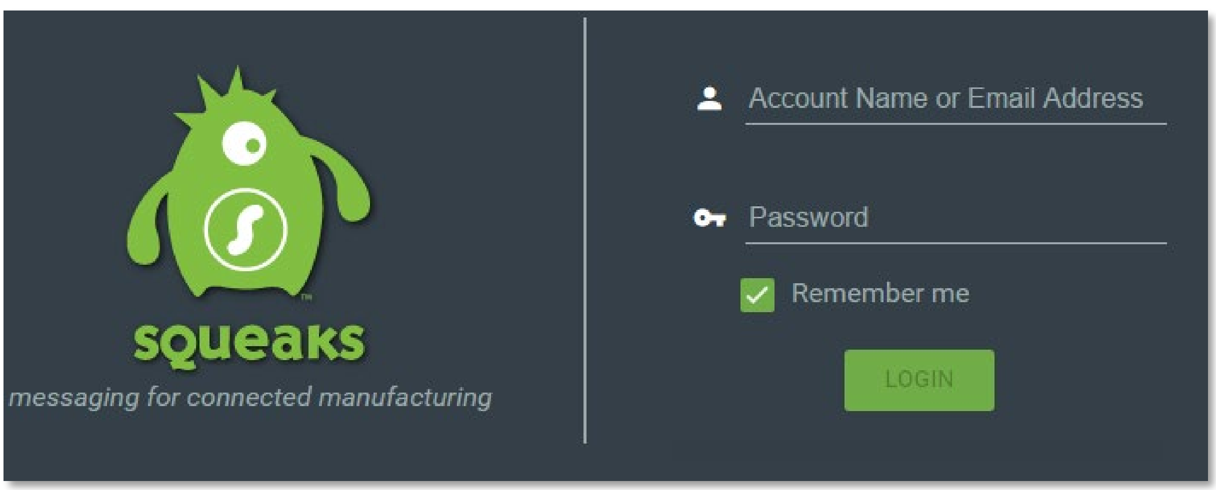


Figure 1: SQUEAKS start page

General Layout

After logging into SQUEAKS, the user is greeted with a page similar to **Figure 2**.

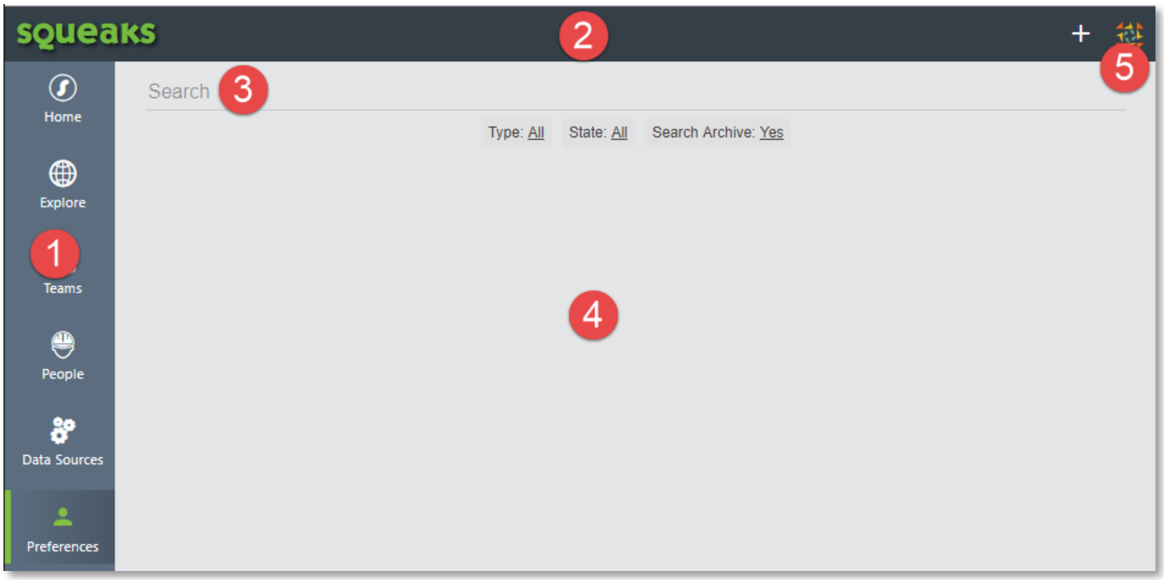


Figure 2 - SQUEAKS main page

The page is divided into the following main sections; the header bar (2), the navigation bar (1) and the main display area (4). Within each section are additional options, such as the search bar (3) and the user profile (5).

Depending on which navigation item is selected on the left side, a secondary navigation menu is displayed.

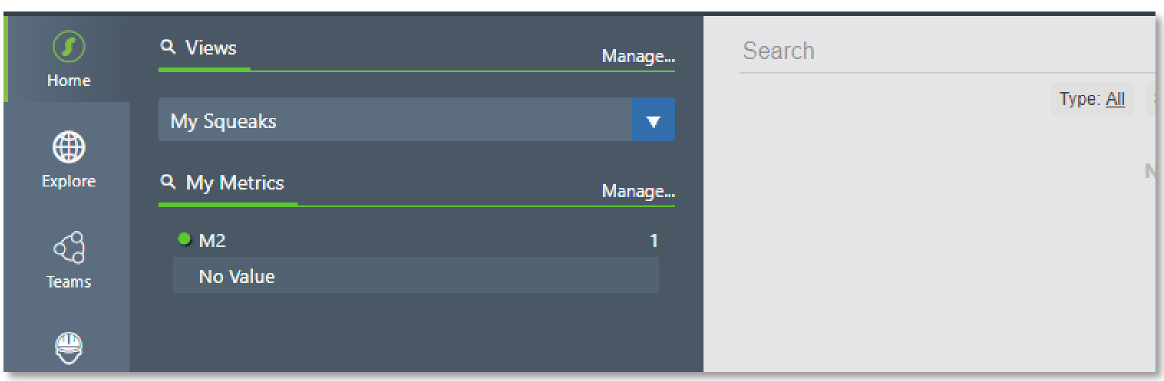


Figure 3 - Secondary navigation panel

Header Bar

The following items are available on the header bar.

Menu Item	Icon	Description

New Squeak		Opens the new Squeak window. If a Team is currently selected from the Teams display, the Squeak will target that Team.
Profile		The profile button opens the User's profile. For details on the User's profile, and making changes to the profile, see the section titled *Editing User Profiles* below (*note: the profile image will change based on the current User's profile image).*

Navigation Bar

The navigation bar is used to choose between the different Squeaks views. Depending on which option is chosen, a second navigation menu will be displayed to the right of the main Navigation bar. This second menu presents more detailed display options. Each navigation option has a detailed description below. If the logged in User is an Administrator, this bar also contains the Settings menu.

Name	Description
Home	The main display area for SQUEAKS. Home displays the Squeaks that are relevant to the logged in user, which includes Squeaks the user has tuned into, Squeaks the user has been included on, Squeaks that have escalated to the user and Squeaks created the user. In addition, a user can define views that can be selected from the views drop down in the secondary navigation panel. These views can be filters setup for the user or Dashboards. For additional information about Dashboards see the section titled **Dashboards.**
Explore	Opens a view of all Squeaks in the system. The secondary navigation panel displays a list of all metrics in the system as well as a "My Metrics" second below. For more information, see the section titled **Metrics.**
Teams	Allows Squeaks to be viewed by Team. Teams have filters that control the Squeaks that are displayed for the Team. Selecting a Team from the secondary navigation menu determines what Metrics and Squeaks are displayed. Users can also edit and create new teams from here. See the section titled **Teams** for more information.
People	Allows Squeaks to be viewed based on the user account that generated the Squeak. Selecting a person from the secondary navigation menu determines what Metrics and Squeaks are displayed. Administrators can also create new users from here.
Data Sources	Allows Squeaks to be viewed based on the Data Source that generated the Squeak. Selecting a Data Source from the secondary navigation menu determines what Metrics and Squeaks are displayed. Users can also create new Data Sources from here.
Preferences	The Preferences navigation menu item sets preferences for the view area. The following settings are available. • *Metric Order* – the order that Metrics are displayed in in the secondary navigation panel. This includes the My Metrics section. • *Metric Change Column* – specifies if, and how, the "Change" column will be displayed in the list of Metrics. • *Dashbaord Theme* – specifies the default theme that will be applied to all of the user's dashboards.

	• *Receive email notifications* – a checkbox that indicates if the current user should receive email notifications from SQUEAKS events. • *Receive push notifications* - a checkbox that indicates if the current user should receive push notifications from SQUEAKS events.
Settings	For administrator users, this menu item presents all of the system administration options. For help with this section, see the **SQUEAKS Administrator's Guide.**

Main Display Area

The main display area is where the list of currently displayed Squeaks are shown. Squeaks are shown in time order, except when a Squeak is pinned to the top of the view.

Search Bar

The Search Bar is contained within the Main Display Area and is used to search the contents of that panel. To search the contents of the panel, simply begin typing the desired search term into the search bar. There are three options when executing a search.

Name	Description
Type	Allows the User to specify what type of content should be searched. The options are Squeak, Metric and Called For. Each can be toggled on or off independently.
State	Allows the User to specify what states should be included in the search results. The state options are any state specified in either the default Workflow or custom Workflows. See the section Workflows for more details.
Search Archive	Allows the User to search the archived Squeaks as well as the current live Squeaks. Squeaks are archived slowly over time, so that old Squeaks are not given the same priority as new Squeaks. Once a Squeak is archived, it is still in the application, it is just stored in a lower priority database system that is only searched if this setting is toggled on.

Viewing Squeaks from Different Sources

The navigation bar and secondary navigation bar allow a user to specify which Squeaks are displayed in the main display area. This includes selecting a specific Person, Team or Data Source, viewing all Squeaks or creating a filter and viewing Squeaks only for that view. For example, using the navigation bar on the left to select "People" then selecting a specific Person will display only the Squeaks generated by the selected Person.

When "Teams", "People" or "Data Sources" are selected from the navigation bar, the secondary navigation bar is displayed (**figure 3**) and the user can choose a Team, Person, or Data Source from the drop box at the top. Only the Squeaks from the selected source are visible. See below for details on the selectable Data Sources.

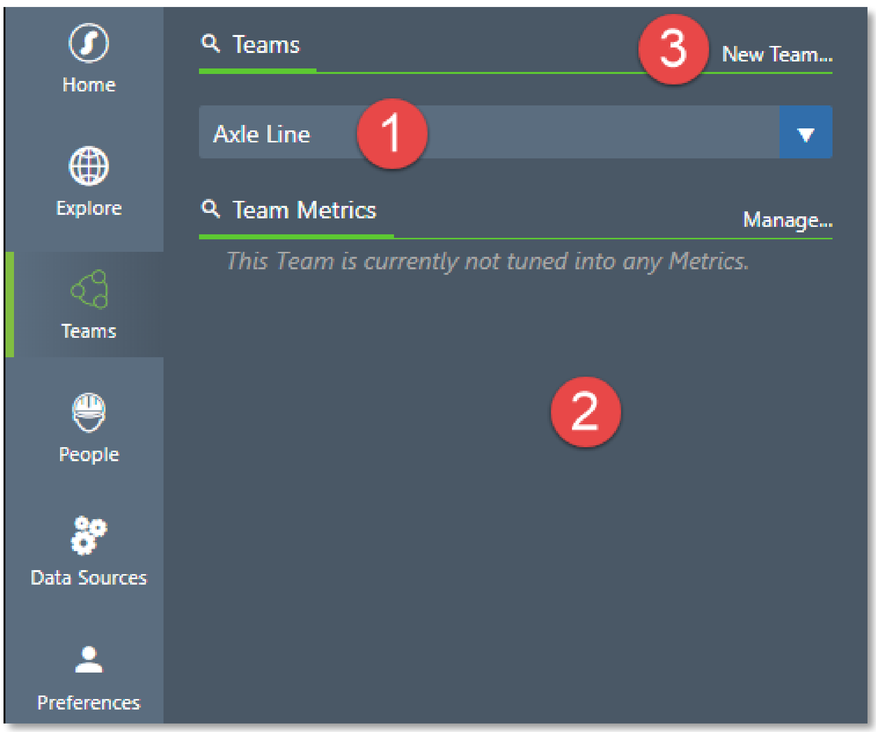


Figure 4 – The "Teams" secondary navigation panel for selecting a Team

The secondary navigation panel for Teams, People and Data Sources has three main areas: The currently selected Team, User or Data Source (1), the Metrics for the selected team, User or Data Source (2) and a button to create a new Team, User or Data Source (3).

Selecting a Team from the secondary navigation panel will display all Squeaks that Team is configured to receive. This means any Squeaks setup to be included by the Team's Tune Ins and Filters. For details on Teams and Filters, see the section below titled **Teams**.

Similarly, if "People" or "Data Sources" are selected, the same panel will be displayed for either People or Data Sources. Selecting a Person or Data Source will display all Squeaks generated by that Person or Data Source.

User Filters

Users can create filters that can be selected from the Views drop down list to control what is displayed in the main display area. These filters work the same as Team filters only for an individual User instead of being for a Team. Filters can also be shared among Users so that more than one User has access to the same Filter. These Filters affect the notifications a User receives. If a User has a filter setup to follow a specific Team or Data Source then the user will receive notifications on Squeaks generated by that Team or Data Source.

To create a new User Filter, click on the *Home* button in the main navigation panel. Then click on "Manage…" at the top of the secondary navigation panel. This opens the *Manage Views* window.

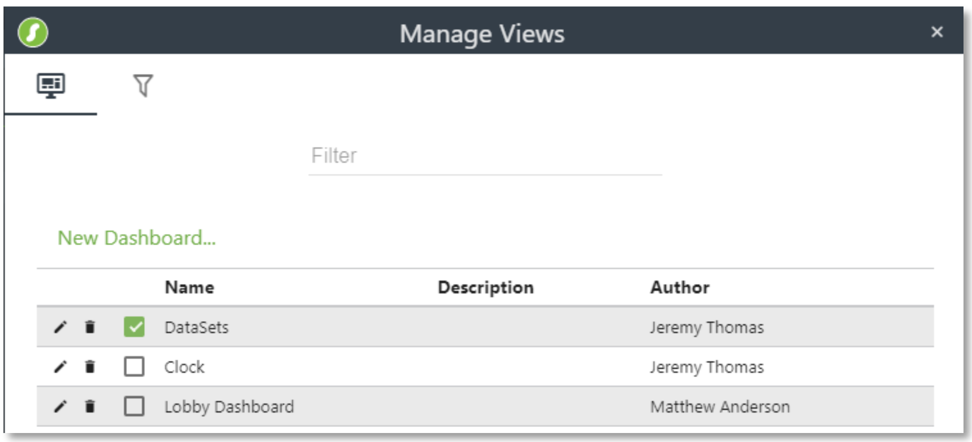


Figure 5 - Manage Views window

The *Manage Views* window initially opens to a list of Dashboards. Clicking on "New Dashboard…" will open the *New Dashboard* window. See the section titled **Dashboards** for more information. Clicking on the *Filters* tab will display a list of the Users Filters. Clicking "New filter.." will open the *New Filter* window.

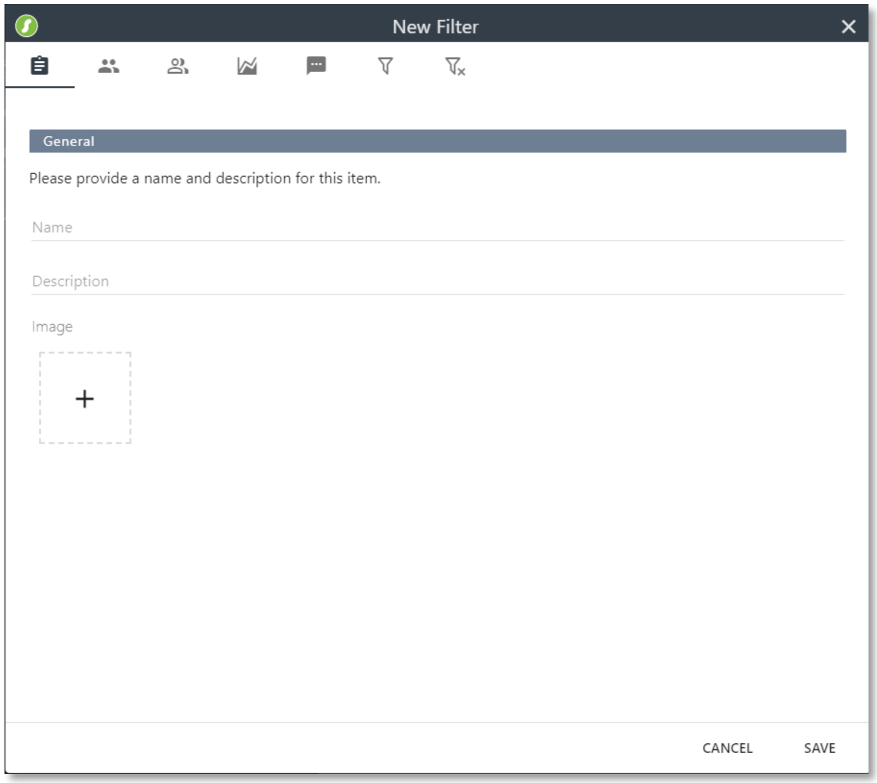


Figure 6 - New Filter Window

Managers

The Managers tab allows the User the option to select a Manager for this Filter. Managers are in charge of their Filters and can configure them using this window.

Members

The Members tab lists all current members of this Filter, and gives the user the option to add or remove members. Members are able to view the Filter, but not make changes to it. Any user can add or remove themselves from he members list by adding or removing the Filter from their *Manage Views* window. To find a specific Person in the list, type the Person's name in the "Filter" line.

- To add a new member, click the checkbox next to their username.
- To delete a member, uncheck the checkbox next to their username.

Metrics

To assign a Metric to a Filter, so that all Members are notified of new values of the Metric (if the Metric is configured to notify) and so the Metric will show-up on the Users Metrics list, click on the *Metrics* tab and click on the checkbox next to the desired Metric.

Tuned In List

The Tuned In Filter item is used to limit the incoming Squeaks to only the selected Users or Data Sources. If a Tuned In Filter is specified, by selecting a User or Data Source from the list of available Users and Data Sources, then only messages for those Users and Data Sources will be considered for

Matches and Exclude Filters. If no Matches or Exclude Filter is specified, all messages from the selected Users and Data Sources will be displayed for this User Filter.

Example: The welder Data Source is selected as a Tune In Filter for a new User Filter. When the Filter is selected from the Views drop down, only messages from the welder Data Source will be displayed.

Matches Filters

Matches Filters are used to specify requirements to include a Squeak in the User's Filter. Matches Filters are strings that are used to match values to the filter specified. Matches Filters will only be applied to messages coming from the Tuned In Filter, or if no Include Filter is selected, it will filter all messages. The possible Matches Filters are as follows.

Option	Description	Example 1	Example 2
Message	Matches the entered string to the body of the Squeak. If the entered string is found in the body of the Squeak, the Squeak is included in the Filter.	A User's message Matches Filter of "Team C" would match a Squeak that had the message "Team C is needed in the break room at noon."	A User's message Matches Filter of "Factory A, Factory B" would match any Squeak with "Factory A" or "Factory B" in its text.
Tags	Matches the string to the tags on the Squeak. Individual tag values should be comma separated. If one or more of the tags in the Filter match any tag on the Squeak, the Squeak is included in the Filter.	A User's tag Matches Filter of "Daily Production Totals" would match any Squeaks that are tagged with the tag value "Daily Production Totals."	A User's tag Matches Filter of "Team A, Team B, Team C" would match any Squeaks that are tagged with the tag value of "Team A", "Team B" or "Team C."
Labels	Matches the string to the labels on the Squeak. Individual label values should be comma separated. If one or more of the labels in the Filter matches a label on the Squeak, the Squeak is included in the Filter.	A User Filter is setup with a label Matches Filter of "Shift 1" with no Tune In Filters. Any Squeak created by any Data Source or User with a label of "Shift 1" would be included in the Filter.	A User Filter is setup with a label Matches Filter of "Shift 1, Shift 2" with Tune In Filter of "Assembly 1." If Assembly 1 produces a Squeak with a label of "Shift 1" or "Shift 2," the Squeak would be included in the Filter.

Exclude Filters

Exclude Filters are used to specify requirements for excluding messages that would otherwise be included in the Filter. If no Matches Filter is created, and no Data Sources or Users are selected for the Filter, then the Exclude Filter will not be applied since there are no included messages to filter.

Option	Description	Example 1	Example 2
Message	Matches the entered string to the body of the Squeak. If the entered string is	A User Filter has Tuned In to the IT User account. The Filter has a message Exclude Filter of "plant floor." The IT User account	A User Filter has Tuned In to the IT User account. The Filter has a message Exclude Filter of "Assembly Line 1, Factory

	found in the body of the Squeak, the Squeak is will be excluded from the Filter.	generates a squeak with the message “The plant floor network will be shut down at 10AM for one hour.” Because the Filter is setup to exclude all messages with “plant floor” in it, that message will not display in the Filter.	C”. Any Squeak containing the phrases “Assembly Line 1” or “Factory C” would be excluded from the Filter.
Tags	Matches the string to the tags on the Squeak. Individual tag values should be comma separated. If one or more of the tags in the Filter match any tag on the Squeak, the Squeak is excluded from the Filter.	A User Filter has Tuned In to the Maintenance Team User account. The Filter has a label Exclude Filter of “Line 1.” The Maintenance Team User account generates a Squeak with the tags “Line 1,” “Line 2” and “Assembly.” Because the Filter is set up to exclude messages with the tag “Line 1,” this message will be excluded.	A User Filter has Tuned In to the Maintenance Team User account. The Filter has a label Exclude Filter of “urgent.” The Maintenance Team User Account generates a Squeak with the tags “urgent” and “assembly.” Because the Filter is set up to exclude messages with the tag “urgent”, this message will be excluded.
Labels	Matches the string to the labels on the Squeak. Individual label values should be comma separated. If one or more of the labels in the Filter matches a label on the Squeak, the Squeak is excluded from the Filter.	A User Filter has Tuned In to the IT User account. The Filter has a message Exclude Filter of “plant floor.” The IT User account generates a Squeak with the message “The plant floor network will be shut down at 10AM for one hour.” Because the Filter is set up to exclude all messages with “plant floor” in it, that message will not be included in the Filter.	A User Filter has Tuned In to the IT User account. The Filter has a message Exclude Filter of “manufacturing”. The IT User account generates a Squeak with the message “Help needed with manufacturing process 4f of Line 5.” Because the Filter is set up to exclude all messages with “manufacturing” in it, that message will not be included in the Filter.

Viewing Dashboards and Filters

Once a Dashboard or Filter has been created, it can be viewed from the Home screen (left hand navigation panel). For help setting up a Dashboard, see the section titled **Dashboards.** To view a Dashboard or Filter from the Home screen, click on "Manage…" at the top of the left panel. This brings up the *Manage Views* window, which can be used to configure Filters and Dashboards for display on the Home screen.

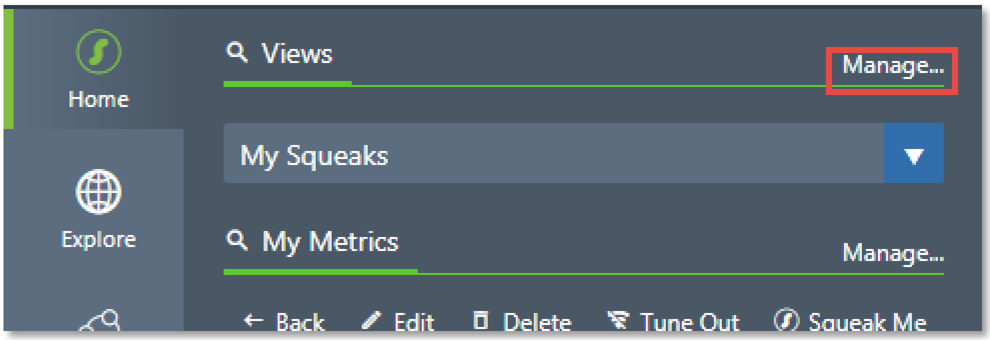


Figure 7 - View Management

From the *Manage Views* window, check the checkbox next to the desired Dashboard or Filter and click "OK." This will Tune In the Dashboard or Filter so that it is available to the signed in account. Then from the *Views* drop box at the top of the left panel, select the desired Dashboard or Filter.

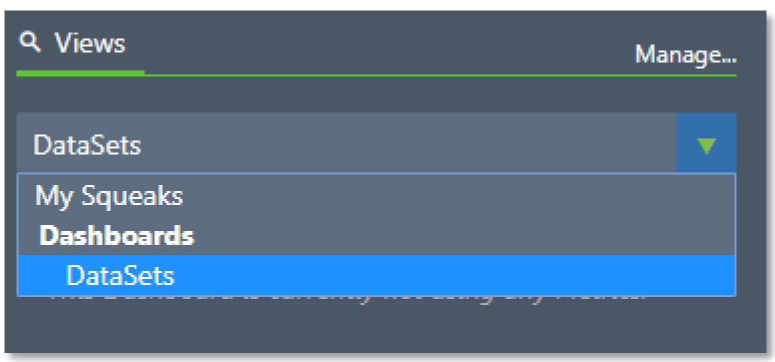


Figure 8 - View Drop Box

Squeaks

The Squeaks panel displays all of the Squeaks for the currently selected source. The Squeaks are formatted for optimal display within the available space, as dictated by the resolution of the client browser. The section bellow outlines the layout of a Squeak Message (other Squeak types are outlined in the section "Creating a new Squeak"), the available options and information presented.

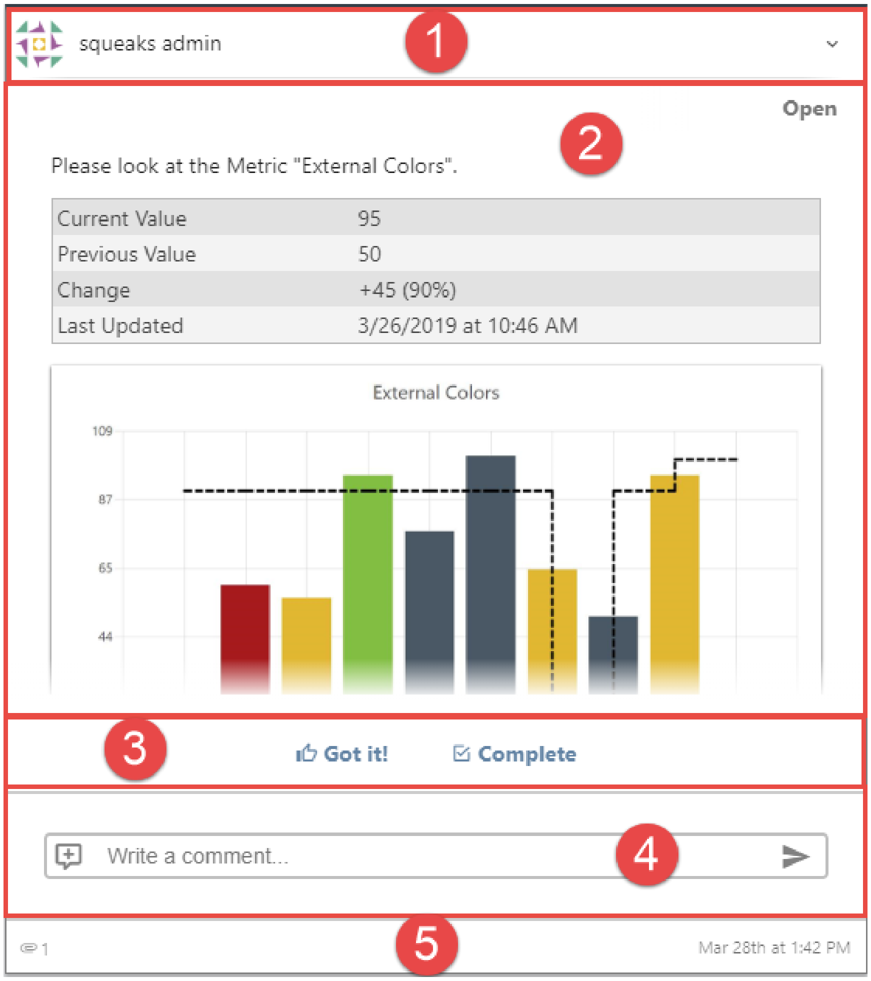
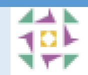
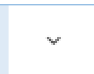


Figure 9: Structure of a Squeak.

The following sections of a Squeak are outlined below: the header bar (1), the body of the Squeak (2), the action bar (3), the comment bar (4) and the footer (5).

Header of a Squeak

The following items are available in the header (1) of the Squeak.

Name	Icon	Description
Profile Image		The profile image of the source of the Squeak. This can be the profile image of the Data Source or User that created the Squeak. Clicking on the profile image opens the Source Profile menu. See the section below titled *Source Profile Menu* for more information.
User or Data Source information	squeaks admin	The name of the User or Data Source that generated the Squeak, with a text description of when the Squeak was posted.
Additional options		The additional options menu has the following choices: • Pin • History • Tune In / Tune Out • Mute • Attachments • **Edit*** • **Delete*** • Got It!*** • Complete*** For details on the "Pin" see the section titled *Pinning a Squeak.* "Tune In" allows the current User to Tune In to the Squeak. The "History" option shows the history of actions taken on the Squeak. *Only shown if the current User is an administrator or owner of the Squeak. ***The Actions change depending on the selected Workflow. See the section titled **Workflows** for details.

Source Profile Menu

Clicking on the profile image of a Squeak opens the Source Profile menu. This provides additional information about the source of the Squeak, including an option to view all Squeaks from that source.

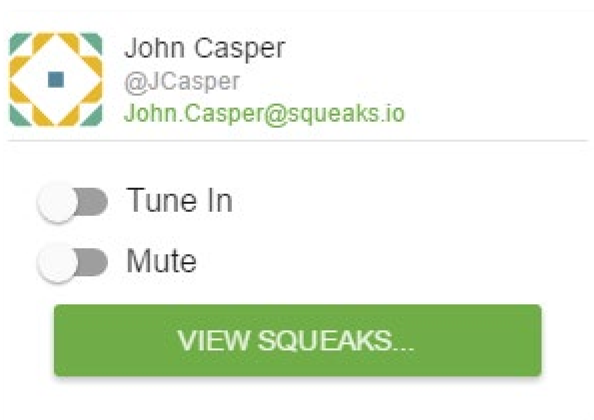


Figure 10 - Source Profile Menu

Clicking "View Squeaks" will change the selected item in the left hand navigation bar to be the selected source and display only Squeaks from that User or Data Source. To tune in to the source of the Squeak itself and receive all Squeaks from this User or Data Source, toggle the "Tune In" slide switch.

Body of a Squeak

Below the header is the body (2), containing the text of the Squeak itself, including any images or videos attached to the Squeak. Other attachments are included in the footer of the Squeak. The body will include a scroll bar if one is necessary to show the full contents of the Squeak. Tags appear inside of the body of the Squeak. Labels are displayed just above the body of the Squeak. If a Metric is included in the Squeak, the Metric data will be shown in the body. For more details about including a Metric in the body of a Squeak, see the section titled **Squeaking out a Metric Value.**

Action Bar

The Action Bar (3) contains all of the actions available on the Squeak. These actions are also available from the "Additional Options" menu item on the header. The actual list of Actions available on the Squeak depends on the selected Workflow. See the section titled **Workflows** for more details about Workflows on Squeaks. The following Actions are the Actions from the default Workflow.

Got it!		If the default Workflow is used, the "Got it" button marks the Squeak as having been claimed by the current User. A Squeak that is claimed by a user will be associated with that Person until it is either completed, or released. See the section on Workflows for a more detailed explanation.
Completed		A Squeak is marked completed to indicate that whatever issue the Squeak was describing is resolved. When it is marked as "Completed" it can no longer be claimed or released. The "Completed" state can have different icons, depending on the selected Workflow. See the section on Workflows for a more detailed explanation.
Release		If the default Workflow is selected, the Release button replaces the Claim button for the User that has claimed a Squeak. This allows the User to release the claimed Squeak. See the section on Workflows for a more detailed explanation.

Squeak Status Icons

A Squeak can contain different status icons across the header and footer of the Squeak. The following is are the possible status icons.

Name	Icon	Description
Notified		Indicates that the current User is receiving notifications for this Squeak. The tooltip on the icon will explain why the User is receiving these notifications.
Escalated		Indicates that the Squeak was escalated according to the Workflow and Escalation rules on the Squeak. See the sections on Workflows and Escalation Rules for more details.
Comments	0	Shows the number of comments on the Squeak. The number to the right of the icon is the total number of comments.
Attachments	1	Shows the number of attachments on the Squeak. The number to the right of the icon is the total number of attachments.

Comment Bar

Comments can be added to the Squeak by clicking the *Comment* box (4) at the bottom of the Squeak (where the text "Write a comment.." is located). Type in the desired comment and click the *Send* button ( ). This will post the comment to the Squeak and notify anyone tuned-in to the Squeak.

To open the advanced comment window, where files can be attached and a larger comment box is included, click the *Add Comment* button ( ).

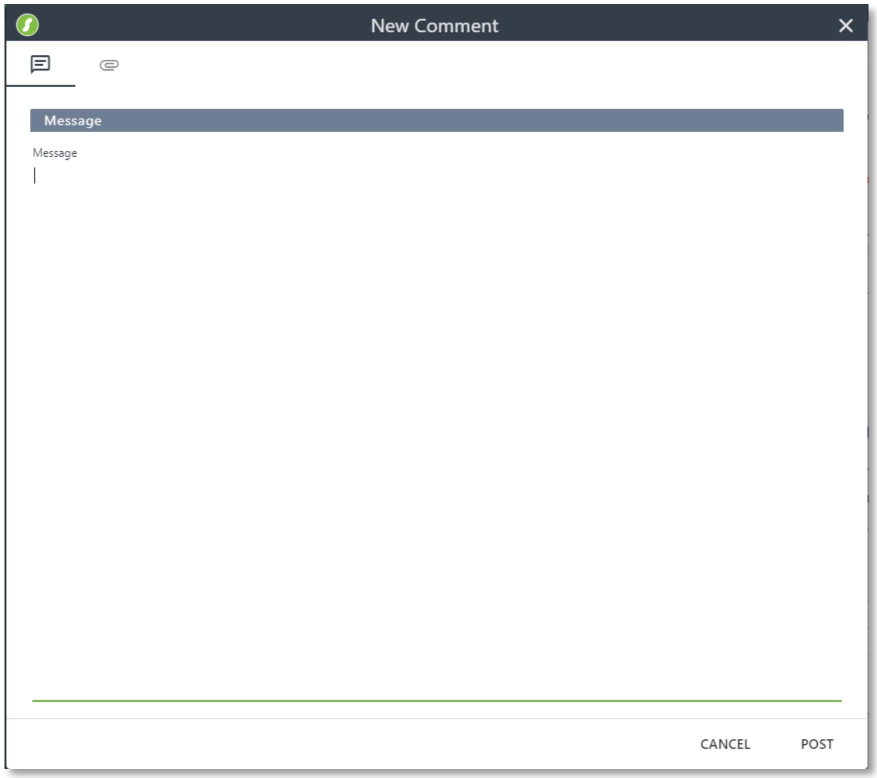


Figure 11 - A Squeak reply window.

Clicking "Post" will add the Comment to the Squeak. Attachments can be added to the Comment by clicking the attachment icon ( ) and choosing the file. Attached images and videos are displayed in the body of the Comment. Other file types are included as links for download.

Footer of a Squeak

The Squeak footer (5) contains icons that indicate the number of Comments, Attachments and Likes on the Squeak. The star icon can also be clicked to Like the Squeak.

Pinning a Squeak

A User can "Pin" a Squeak to the top of the Squeaks display area by clicking on the additional options button ( ) in the top right-hand corner of the Squeak and clicking the *Pin* button. Once a Squeak is pinned, the thumbtack icon appears in the top-center of the Squeak (**Figure 8)**.

Figure 12 - Pinned Squeak

The pinned Squeak will remain on the top of the page until it is unpinned, which can be done either by clicking on the thumbtack icon at the top of the Squeak, or by clicking on the additional options button and clicking *Unpin*.

History

The history of a Squeak displays all activities performed on the Squeak since it was created. This includes Comments made, times the Squeak was claimed ("Got It!") or released, Tune In and Tune Out actions, Mute and Unmute actions and, if applicable, when it was Completed. To view the history of a Squeak, click the additional options menu and choose "History."

Workflows

A Squeak's workflow defines a set of states and rules for progressing a Squeak through those states. This allows a Squeak to have a natural flow from one state to another, and each state can be managed by the users of SQUEAKS.

The Default Workflow

Every SQUEAKS install comes with a preconfigured default Workflow that cannot be deleted or edited. The default Workflow has the following three states:

Name	Description
Claimed	Claimed by a Person, generally indicating that the Person is working on the issue or task described in the Squeak.
Completed	Completed by a Person, generally indicating that the task or issue described in the Squeak has been resolved.
Open	The default state of the Squeak, indicating either that the Squeak has never been claimed, or that if it was claimed, it was later released.

Creating a Custom Workflows

Workflows are defined in the Administrators menu. Only Users with administrative permissions can create new workflows. Standard Users can assign an existing workflow when creating a new Squeak. For details on creating workflows in the administrators menu, see the **SQUEAKS Administrators Guide**.

In addition to the default Workflow, custom Workflows can be created in the Workflows menu. Workflows have the following properties.

Name	Description
Name	The name of the Workflow. This must be unique since this is how a workflow is identified in the Squeaks.
Description	A description for the Workflow, often used to specify the goal of the Workflow.
States	A list of states that a Squeak can have in this Workflow. The states in the default workflow are listed above, but custom states can be anything that makes sense for your environment. One state must be specified as a "start" and another as an "end" so that Squeaks can have an initial state and a terminal state.
Actions	A list of actions that can be performed on a Squeak. The actions are displayed as buttons (chosen in the Action configuration) on the Squeak that can be clicked on. Clicking the button moves a Squeak from one state to another. Each action specifies its starting state, the text or name of the action, and the destination state. The starting state is the state a Squeak must be in for the action to be taken. The destination state is the state the Squeak will be moved to when the action is initiated.

NOTE | **Actions can move a Squeak to ANY defined state. They do not have to be linear movements. So a Squeak can be moved back to an initial state, or**

moved straight to an end state, if desired. A single state can also have multiple actions on it.

Example

A facility has an application where changes made to recipes must be published for review and then trialed before they are pushed into production. When a recipe change is made, the MES system automatically generates a Squeak containing those changes. This situation could use the following states.

State	Description
Announced	The recipe change has been made on the floor and updated in the MES system. This is the starting state (Is Start).
Reviewed	The recipe change has been reviewed by the team member that marked the Squeak as reviewed. The recipe change is now ready for trailing.
Trialed	The recipe change has been trialed, everything checked out
In Production	The recipe has been trialed, it passed and it has been pushed to production. This is a terminal state (Is End).
Trial failed	The recipe change has been trialed and failed, this is a terminal state. The recipe needs to be changed again (Is End).

These would be the actions for the above scenario.

Action	Starting State	Destination State
Review It	Announced	Reviewed
Trialed It	Reviewed	Trialed
Moved to Production	Trialed	In Production
Reject	Trialed	Trial Failed

Icons could be selected for each action to improve visibility. The “Trial failed” and “In Production” states could also be given icons to show the Squeaks end state.

Escalation Rules

A Squeak’s Workflow can also include a set of escalation rules that are attached to the Squeak. These rules allow SQUEAKS to notify specific users if a set of requirements for the Squeak are not met. Escalation Rules must be associated with Workflows. A single Workflow can have multiple Escalation Rules available to it, but only one of them can be active on a Squeak at a time. Squeaks workflows include three escalation options.

- Escalate the Squeak if it does not enter a specific State within a period of time
- Escalate the Squeak if it enters a specific State, but does not reach an end State, within a period of time after entering the specified State.
- Escalate the Squeak if it does not enter an end State within a period of time after being created

Creating a new Escalation Rule

Escalation Rules are defined in the Administrators menu.   Only Users with administrative permissions can create new Escalation Rules. Standard Users can assign an existing workflow when creating a new Squeak, and then choose a corresponding Escalation Rule for the Workflow. For details on creating workflows in the administrators menu, see the **SQUEAKS Administrators Guide**.

Assigning a Workflow and Escalation Rule to a Squeak

When creating a new Squeak, one of the screens allows an existing Workflow to be assigned to the Squeak. Once a Workflow is selected, optionally an Escalation Rule associated with the Workflow can also be selected. See the section titled **Creating a new Squeak** for details. Workflows and Escalation Rules cannot be added, or edited, on an existing Squeak.

Labels and Tags

Labels and Tags are used to categorize and organize Squeaks to make them easier to find, and to highlight specific topics or important notes about the Squeak. Labels and Tags are used as a filter criteria when creating Teams.

Figure 13 - Squeak with Labels and Tags

Labels

Labels are assigned to the Squeak and appear above the Squeak body, but below the header. Labels can be customized to have a specific background color and text. Labels can be used as a filter criteria for Teams, or typed into the search bar to return only Squeaks containing that Label.

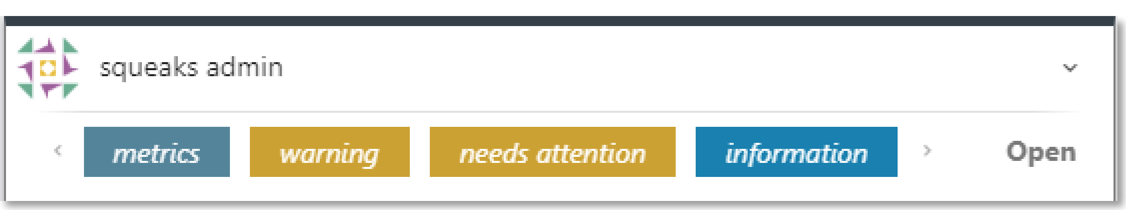


Figure 14 - Labels on a Squeak

Tags

Tags are typed into the body of the Squeak using a "#" symbol to denote the beginning of the Tag. Tags cannot contain spaces. Tags can be used as a filter criteria for teams, or typed into the search bar to return only Squeaks containing that Tag. Tags can also be used as control characters when configured in the SQUEAKS Multiview. See the **<u>SQUEAKS – Administrators Guide</u>** for details.

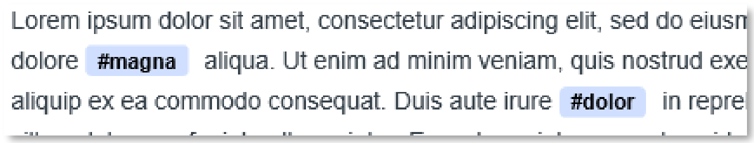


Figure 15 - Tags on a Squeak

Metrics

Metrics are used to display dynamic numeric or text data within SQUEAKS. Data is fed into a Metric, either automatically through the SQUEAKS API or by manually adding values in Metric configuration window. The data can be displayed as a bar chart, a line chart or an area chart (a line chart with the area beneath filled in) or as a simple "current view" of the data displaying a bar and the current value. Up to 60 historical values can be kept in a single Metric.

Metrics are displayed in the secondary left hand navigation panel. Non-Administrators can create new Metrics by clicking on "New Metric…" at the top of the panel when "Explore" is selected from the left-hand navigation menu. For details on creating a new Metric, see the section titled **Creating a New Metric.**

Figure 16 - Metrics

Viewing Metrics

Current metric values can be viewed in the "All Metrics" or "My Metrics" panels in the left-hand secondary navigation panel, but clicking on the Metric will display a more detailed view of the Metric. In this view the previous 15 Metric values are visible for historical Metrics.

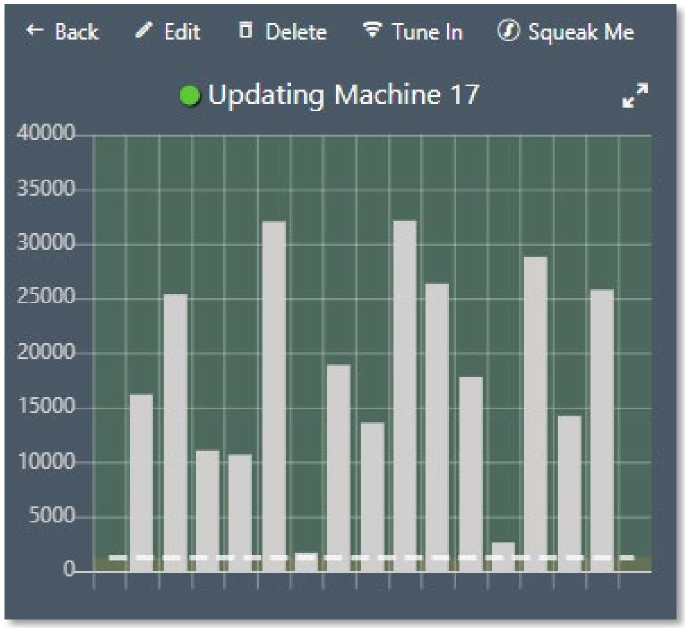


Figure 17 - Metric View

To view the full detailed view of the Metric, click the *Expand* ( ) button in the top right corner of the Metric. This view will display the full value history of the Metric.

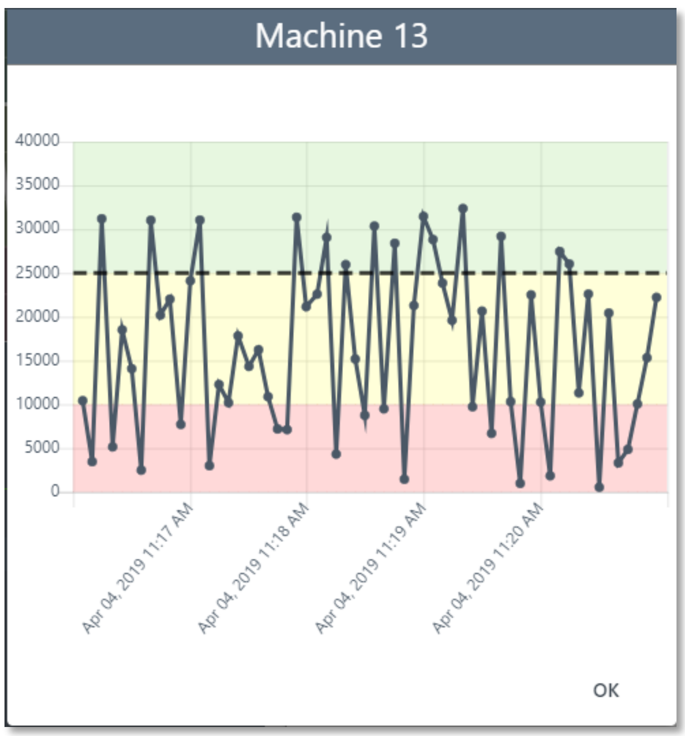


Figure 18 - Detailed Metric View

Clicking the *OK* button in the detailed view will close the window. Clicking the *Back* button on the Metric display will return the panel to displaying a list of Metrics instead of the selected Metric.

Metrics in MultiView

In addition to viewing Metrics in the web site as described above, Metrics can also be included in MultiView. MultiView is a SQUEAKS feature that allows SQUEAKS data to be displayed, unattended, on a large form factor display, such as a TV or large monitor. See the **SQUEAKS Administrators Guide** for details on MultiView.

Metrics in Dashboards

Metrics can also be displayed on Dashboards. Dashboards are visible both in the MultiView Dashboards Panel and in the SQUEAKS application. Dashboards can be selected from the *Views* list when the *Home* navigation item is selected from the main left-hand navigation panel. For details on selecting a Dashboard from the *Views* list, see the section titled **Viewing Squeaks from Different Sources.** For details on creating Dashboards, see the section titled **Dashboards.**

Metric Attributes

In addition to values, Metrics can also have Attributes. Attributes are logged along with values to provide additional metadata about the value. Attributes can then be used to display information in a Dashboard about the Metric. For example, an Attribute on a cycle-time value might be “Part Number” so that the current part number is displayed along with the cycle-time value in the Metric. When a new value is added to a Metric, a list of Attributes can also be added. See the section titled **Creating a new Squeak** for details on creating Metrics, adding values to Metrics and adding Attributes to the values.

Metric Notifications

If a user tunes in a Metric and the Metric is configured to send email notifications, then the user will receive notifications every time a new value is added to the metric. Push notifications are not generated for Metric changes.

Squeaking out a Metric Value

Metric values can also be included in a Squeak and a Squeak can be generated directly from the Metric. There are two ways to generate a Squeak from a Metric. The first is by clicking on the Metric in the list of Metrics in the secondary left-hand navigation panel to view the Metric, then clicking on the *Squeak Me* button at the top of the Metric.

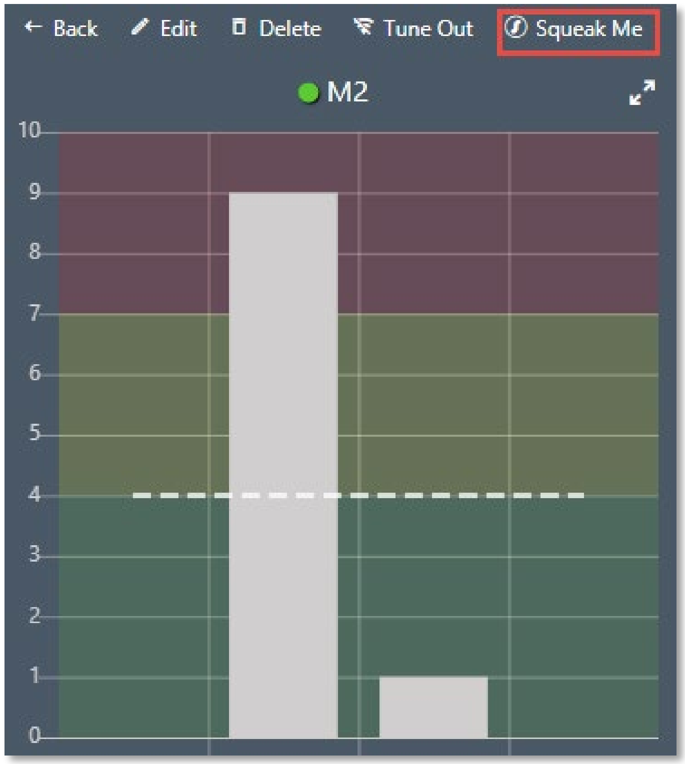


Figure 19 - Squeak Me Button

This will open the *New Squeak* window already populated with all of the information to generate the new Squeak. The Squeak can be edited before posting the Squeak. For details on the Squeak settings, see the section titled **Creating a new Squeak.** When the Squeak is setup as needed, click "Post" to send the Squeak.

> NOTE | **A new Squeak containing a Metric can also be created by dragging and dropping the Metric from the left-hand Navigation panel into the Main Display Area. This will open the *New Squeak* window already populated with all of the information to generate the new Squeak.**

My Metrics

The *My Metrics* panel is used to display Metrics that the user is has tuned-in and wants to monitor on a regular basis. These Metrics are displayed in the *Home, Explore, Teams, People* and *Data Sources* navigation items in the left-hand navigation bar. This makes it easy for a User to monitor the Metrics that are important to them without having to search for the desired Metric.

NOTE | **Anytime Metrics are displayed in the secondary left-hand navigation bar, they can also be searched. Click the search icon to the left of the "My Metrics" or "Metrics" header item and type the desired Metric name.**

Adding Metrics to the *My Metrics* panel

There are three ways to add Metrics to the *My Metrics* panel: by tuning in the Metric from the Metric Details view, by dragging and dropping the Metric to the *My Metrics* panel or by clicking *Manage…* at the top of the *My Metrics* panel and selecting the desired Metrics.

NOTE | **Metrics can be added to the *My Metrics* list by clicking on the Metric in the *All Metrics* panel (with *Explore* selected from the left-hand navigation menu) and dragging the desired Metric to the *My Metrics* panel.**

Managing the *My Metrics* display list

By default, the *My Metrics* display list is ordered to show the Metrics ordered by color. Red Metrics are shown first, then yellow, green and finally Metrics with no color. This ordering can be replaced in favor of custom ordering of the Metrics by clicking on the *Manage…* button at the top of the *My Metrics* panel. This will open the *Manage Metrics* window.

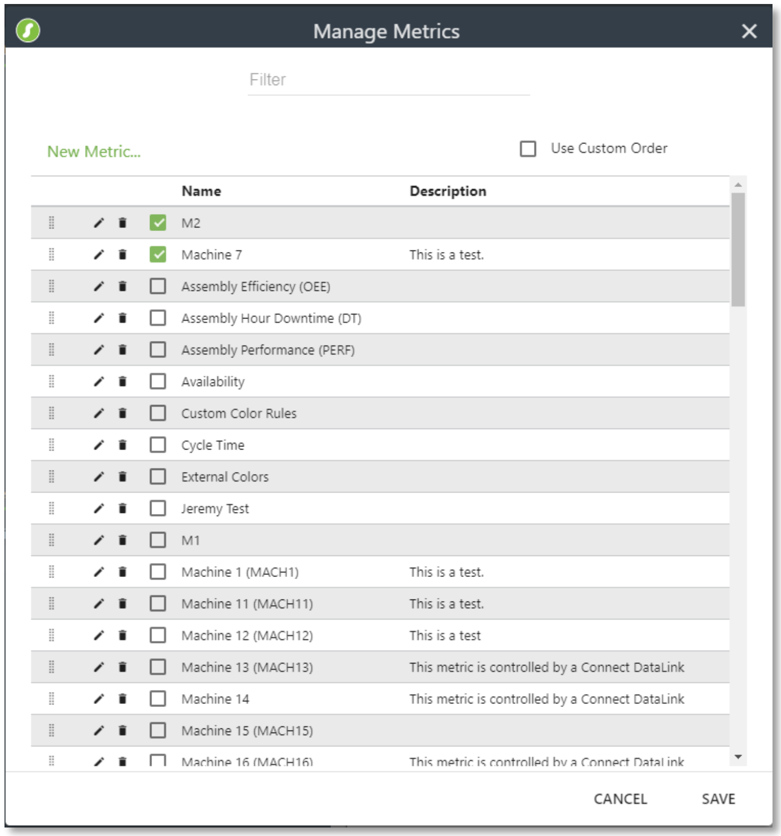


Figure 20 - Manage Metrics Window

Checking the *Use Custom Order* checkbox will cause the *My Metrics* panel to use the order specified in this window when displaying the Metrics. To change the order, click on the desired Metric and drag it to a different location in the list. The order the Metrics are displayed in this window will be the order they are displayed in the *My Metrics* panel. Click the *SAVE* button to save the order. **Only the metrics with a checkbox are displayed in the *My Metrics* panel.** Metrics can also be edited or deleted from this list by clicking on the *Edit* ( ) or *Delete* ( ) button (if the currently logged in user is an Administrator or Manager of the Metric). **Clicking the *Delete* button will delete the Metric from the system, not just from this list.**

Teams and Metrics

Teams can be setup to tune-in specific Metrics. If a Team is tuned into a Metric, then all members of the Team will have the Metric added to their *My Metrics* list. Individual Uses can still choose to tune-out the Metric while remaining part of the Team. Every time the Metric is updated, if configured, the Metric generate an email notification. Metrics can also be part of a team to organize a MultiView Metrics module or Dashboard List. See the **SQUEAKS – Administrator's Guide** for details on the Metrics module and see the section titled **Dashboards** for details on Dashboards.

Metric Colors

Metrics can be configured with color settings that dictate the color status of the Metric. Colors can be set using a "Color Scale", "Custom Rule" or "External" setting. The "Color Scale" setting uses a set of numeric values to specify the current color. The "Custom Rule" setting allows the user to define complex rules for the colors. "External" sets the color manually with each Metric value. See the **Creating a New Metric** section below for details on setting up these color rules.

Creating a New Metric

Metrics can be created by clicking "New Metric…" in the secondary left-hand navigation panel with the *Explore* navigation item selected.

Figure 21 - New Metric Button

This opens the *New Metric* window.

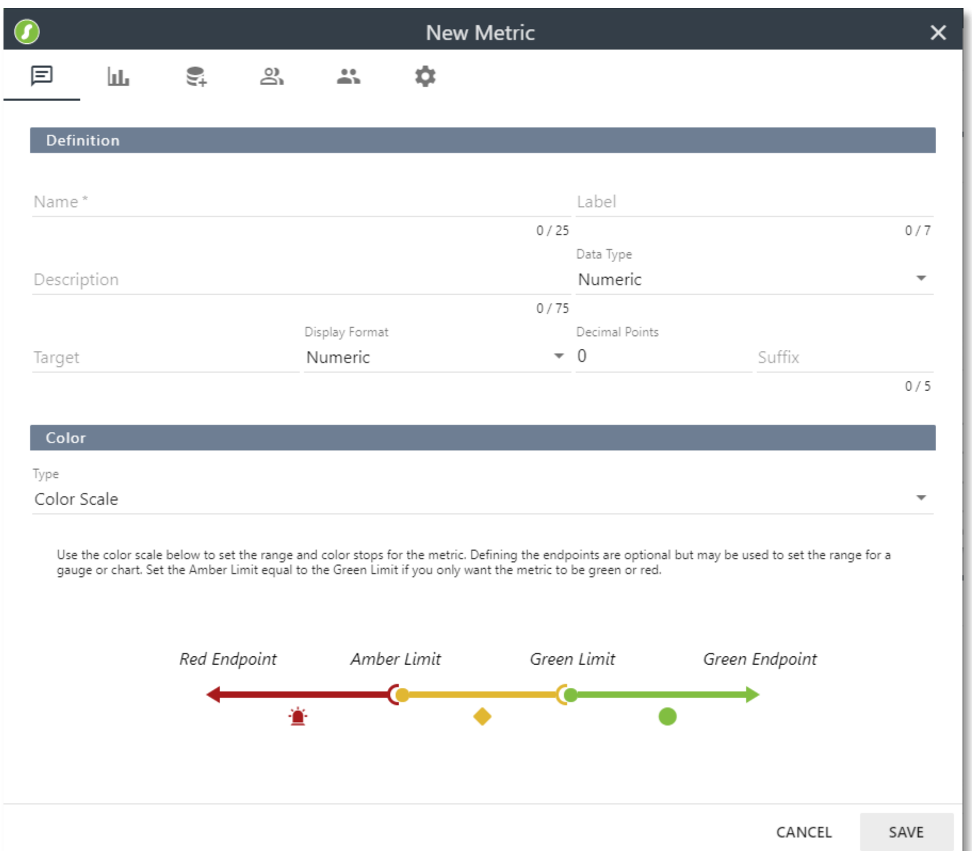


Figure 22 - New Metric Window

A new metric has the following configuration tabs.

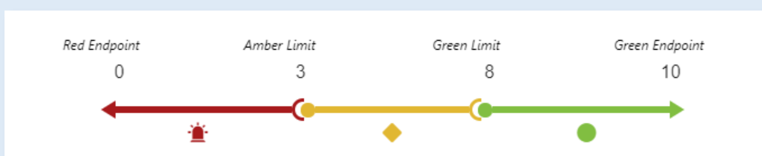
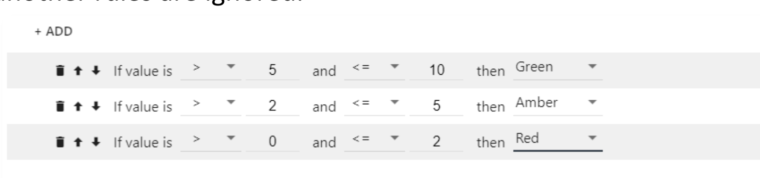
Name	Icon	Description

Definition		The main definition of the Metric. This includes the name, description, label and type of data being displayed in the Squeak. The Color settings are used to specify a range for changing the color of the Squeak to generally represent the status of the metric. For example, if the last value of the Metric was above the Amber Limit, the Metric in Amber (yellow). See the section titled **Setting Metric Colors** for details. The Target value is used to set a goal for Metric performance. It is not used to determine the Metric color, but can be displayed in Gauges and Charts. The Metric **Name** property is limited to 25 characters can cannot contain the following special characters: ~ ! @ # $ % ^ & * ( ) { } [ ]
Type		The two types are as follows: • Historical – a display of the Metric value over time, usually a short time period. • Simple – only the current value of the Metric. In addition to the two main types of Metrics, a chart type can be chosen. The available chart types are line, bar and area.
Data Entry		Used to enter Metric data. Click “Add Value” to create a new Metric value. Target values can be specified for each Metric value, or the value setup at the definition level can be used if the field is left blank. See the section below titled **Adding Metric Values** for details. Metrics can also be populated through the SQUEAKS DataLink. See the SQUEAKS DataLink documentation in the CONNECT product for details.
Target Teams		The Target Teams tab works the same as the Targeted Teams for a Message. See the section above called “Targeting a Team” for details.
Managers		A list of Users that can make changes to the Metric, including adding additional values to the Metric. By default the User who creates the Metric is a Manager, but additional Managers can be selected here. **For a Data Source or User to add values to a Metric, the User or Data Source MUST be a Manager of the Metric.**
Options		Metrics have the following options. • *Items to keep in history* – The number of events to keep in the history of the Metric • *Send email when updated* – A toggle to turn email notifications on or off for the Metric. • *External Link* - When the Metric is clicked on, the User is taken to the destination of the link.

IMPORTANT! | **In SQUEAKS 3.0 some rules about Metrics changed that may require a change to any 2.5 Metrics before they can be used in 3.0. In SQUEAKS 3.0 the name requirements for Metrics changed. The *Baseline* and *Goal* values were removed and replaced with the color scale and Metric values can now only be added by Managers of the Metric. If your SQUEAKS 2.5 Metric is generating errors, check these settings then save the Metric.**

Setting Metric Colors

Metric colors are set by the rules in the Metrics configuration settings. The *Definition* tab has a section titled "Color" that contains all of the color options for the Metric. The following options are available.

Name	Description
Color Scale	A color scale is set with values demarcating the lines between the different colors. The available lines are *Red Endpoint*, *Amber Limit*, *Green Limit* and *Green Endpoint*. The ***Red Endpoint*** marks the beginning of the range of the Metric. This should be used to specify the red endpoint for the gauge or chart. If this value is not specified, the chart or gauge will calculate a value automatically. The **Amber Limit** marks the point where the Metric will turn amber (yellow). The **Green Limit** marks the point where the Metric will turn green. The **Green Endpoint** is used to specify the end of the range of the Metric. If this value is not specified, the chart or gauge will calculate a value automatically. 
Custom Rule	The "Custom Rule" setting is used to manually set rules for color changes in the Metric. While the "Color Scale" option provides a linear color change, the "Custom Rule" setting allows the Metric to set multiple ranges for each color. For example, if a process should be green with deviation to either direction of a center point, then a "Custom Rule" would be more appropriate than the "Color Scale" setting. **Custom Rules are processed from top to bottom.** As soon as a matching rule is found, the color is set and another rules are ignored. 

External	This setting means that no rule will be used to set the color of the Metric. Instead the color will be set by each value manually. If no color is provided for a value then the Metric will not have a color.

Adding Metric Values

Metric values in SQUEAKS have a number of properties and options associated with them. To add a new Metric value, edit a Metric or create a new Metric to open the *New Metric* or *Edit Metric* window. Click on the *Data Entry* tab and click “ADD VALUE” to open the *Metric Value* window.

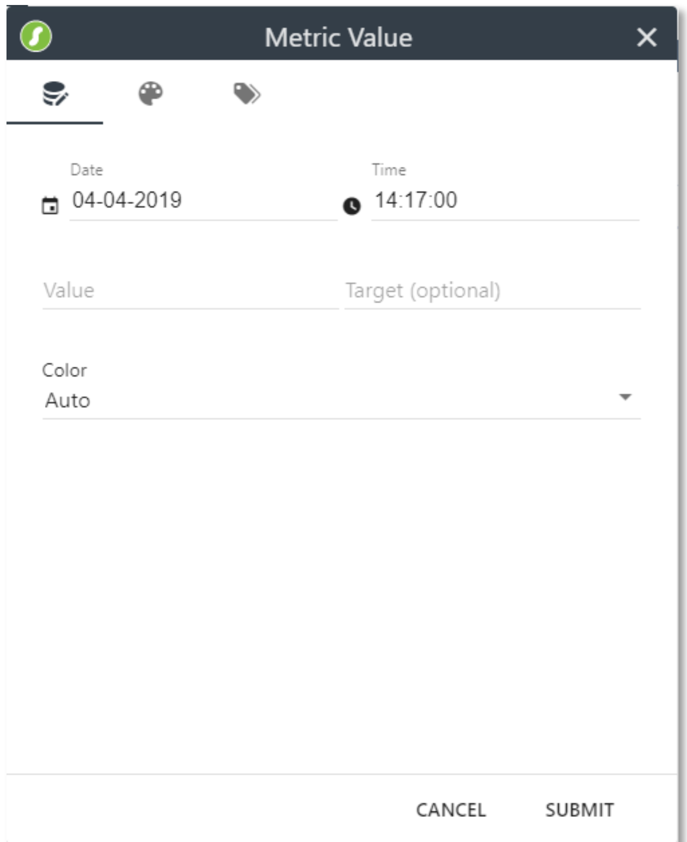


Figure 23 - Metric Values Windows

The *Definition* tab of the *Metric Value* window has fields for the date, time, value and target of the Metric value. There is also a drop box to select a color, or leave it at “Auto” to use the rules setup on the Metric for the color. If “External” was selected for the Metric color rule, then the value should be set here. See the section titled **Setting Metric Colors** for details.

Adding Metric Values using CONNECT[dtu]

To automatically add values to a Metric as values change in a machine or process, CONNECT[dtu] offers the SQUEAKS DataLink. The SQUEAKS DataLink and CONNECT[dtu] are both included with SQUEAKS. To use the CONNECT[dtu] to send values to a Metric, the DataSource or User that is logged into the DataLink must be an owner of the Metric.

Setting Attributes

To set Attributes on the Metric, click on the *Attributes* tab in the *Metric Value* window.

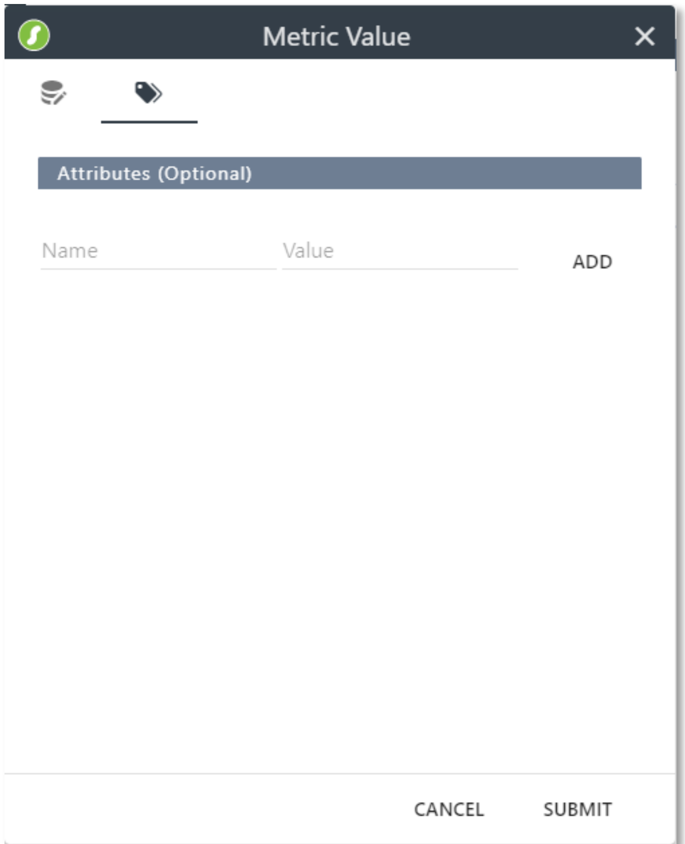


Figure 24 - Attributes Tab

Type in a *Name* and *Value* and click "ADD" to add it to the Metric Value. Then click "SUBMIT" to add the new value to the Metric. Attribute Names and Values are strings.

Teams

Teams are used to separate Users into groups so that Squeaks can be viewed per Team, rather than seeing all Squeaks at once without organization. Teams also allow new Squeaks to target an entire Team, notifying all members of that Team of the new Squeak. Each Team has one or more Managers, who can configure the settings and members of that group. A Team can have any number of members in it and can be Tuned In to by Users who aren't members.

Creating a New Team

To create a new Team, click on the *Teams* navigation menu item on the left hand side of the SQUEAKS main page. This will open the Teams panel. Click on the *New Team…* button at the top of the panel.

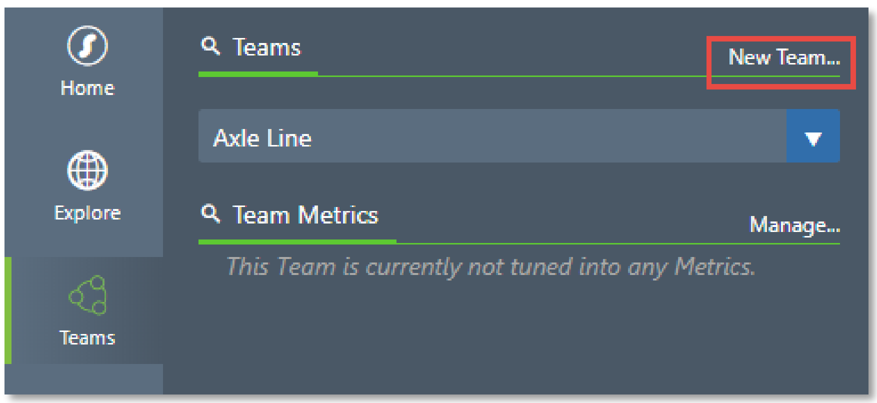


Figure 25: New Team Button

This will bring up the New Team panel, containing the properties and configuration items for the new Team.

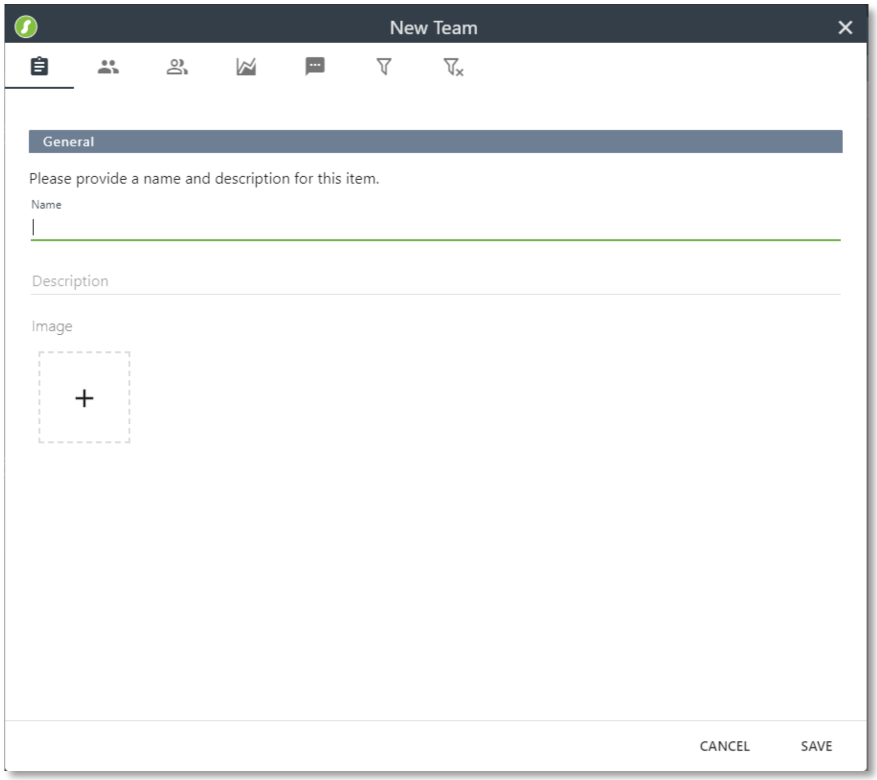


Figure 26 - New Team Window

This displays the New Team window. The first tab shown allows the User the option to name the Team, give it a description, and select a profile picture if desired. If no profile picture is selected, one is auto-generated.

Team Managers

The Managers tab allows the User the option to select a Manager for this Team. Team Managers are in charge of their Teams and can configure them using this window, as well as have access to the Team Management Window.

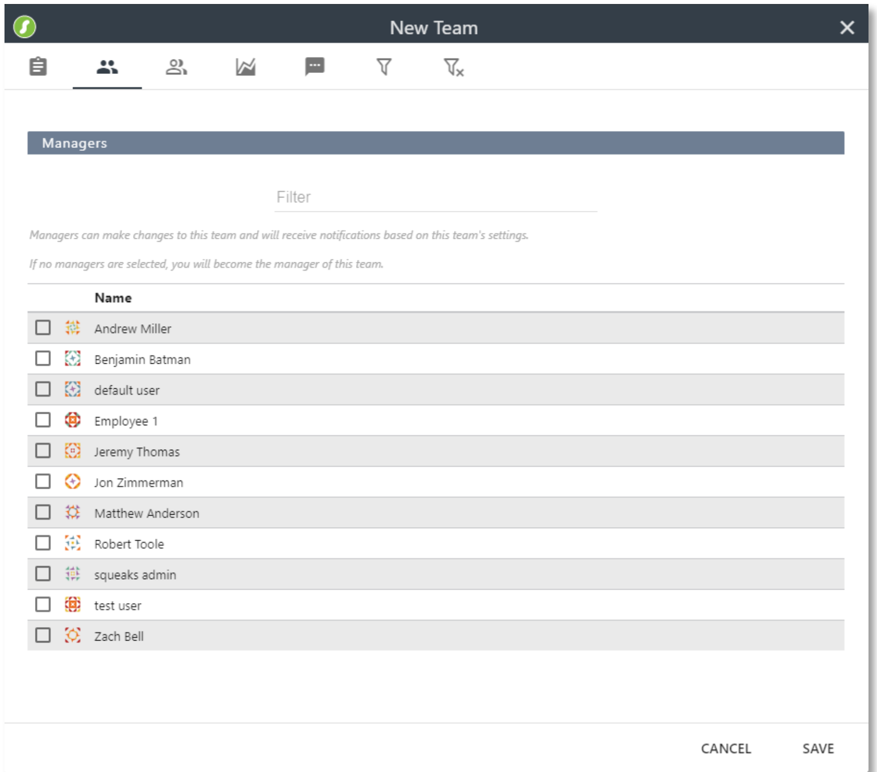


Figure 27 - New Team Window, Members Tab

Team Members

The Members tab lists all current members of this Team, and gives the user the option to add or remove members to this Team. To find a specific Person in the list, type the Person's name in the "Filter" line.

- To add a new member, click the Person you would like to add and check the box next to their name.
- To delete a member, click the member and uncheck the box next to their name.

Team Metrics

To assign a Metric to a team, so that all Team Members are notified of new values of the Metric (if the Metric is configured to notify) and so the Metric will show-up on the Team's Metrics list, click on the *Metrics* tab and click on the checkbox to the left of the desired Metric. A green check will appear if the Metric is selected. To unselect a Metric, click the checkbox again.

The remaining options for a Team are for configuring the Team Filters, and are covered below in the *Filters* section.

Filters

Filters are used to determine what information gets to a Team or individual User. Filters can be used to include Squeaks that match specific requirements and then to exclude ones from that set that match a different set of requirements. This document explains how Squeaks Filters work, and how Matches and Excludes can be used to decide which Squeaks are included in a Team's feed.

Tuned In Filter

The Tuned In Filter is used to limit the incoming messages to only the selected Users or Data Sources. If a Tuned In Filter is specified, by selecting a User or Data Source from the list of available Users and Data Sources, then only messages for those Users and Data Sources will be considered for Matches and Exclude Filters. If no Matches or Exclude Filter is specified, all messages from the selected Users and Data Sources will be displayed for this Team.

Example: The welder Data Source is selected as a Tune In Filter for the maintenance team. When displaying Squeaks for the maintenance team, only messages from the welder Data Source are displayed.

Matches Filters

Matches Filters are used to specify requirements to include a Squeak in a Team's feed. Matches Filters are strings that are used to match values to the filter specified. Matches Filters will only be applied to messages coming from the Tuned In Filter, or if no Include Filter is selected, it will filter all messages. The possible Matches Filters are as follows.

Option	Description	Example 1	Example 2
Message	Matches the entered string to the body of the Squeak. If the entered string is found in the body of the Squeak, the Squeak is included in the Team's feed.	A Team's message Matches Filter of "Team C" would match a Squeak that had the message "Team C is needed in the break room at noon."	A Team's message Matches Filter of "Factory A, Factory B" would match any Squeak with "Factory A" or "Factory B" in its text.
Tags	Matches the string to the tags on the Squeak. Individual tag values should be comma separated. If one or more of the tags in the Filter match any tag on the Squeak, the Squeak is included in the Team's feed.	A Team's tag Matches Filter of "Daily Production Totals" would match any Squeaks that are tagged with the tag value "Daily Production Totals."	A Team's tag Matches Filter of "Team A, Team B, Team C" would match any Squeaks that are tagged with the tag value of "Team A", "Team B" or "Team C."
Labels	Matches the string to the labels on the Squeak. Individual label values should be comma separated. If one or more of the labels in the Filter matches a label on the Squeak, the Squeak is included in the Team's feed.	A Group is setup with a label Matches Filter of "Shift 1" with no Tune In Filters. Any Squeak created by any Data Source or User with a label of "Shift 1" would be included in the Group's feed.	A Team is setup with a label Matches Filter of "Shift 1, Shift 2" with Tune In Filter of "Assembly 1." If Assembly 1 produces a Squeak with a label of "Shift 1" or "Shift 2," the Squeak would be included in the Team's feed.

Mentions and Targets

An exception to the requirements for Matches Filters is any message where the User or Team is directly mentioned or targeted by a Squeak. A mention or target will bypass Filters and be automatically included in the Team's or User's feed.

Exclude Filters

Exclude Filters are used to specify requirements for excluding messages that would otherwise be included in the message stream. If no Matches Filter is created, and no Data Sources or Users are selected for the Team, then the Exclude Filter will not be applied since there are no included messages to filter.

Option	Description	Example 1	Example 2
Message	Matches the entered string to the body of the Squeak. If the entered string is found in the body of the Squeak, the Squeak is will be excluded from the Team's feed.	A Team has Tuned In to the IT User account. The Team has a message Exclude Filter of "plant floor." The IT User account generates a squeak with the message "The plant floor network will be shut down at 10AM for one hour." Because the Team is setup to exclude all messages with "plant floor" in it, that message will not display on the Team's feed.	A Team has Tuned In to the IT User account. The Team has a message Exclude Filter of "Assembly Line 1, Factory C". Any Squeak containing the phrases "Assembly Line 1" or "Factory C" would be excluded from the Team's feed.
Tags	Matches the string to the tags on the Squeak. Individual tag values should be comma separated. If one or more of the tags in the Filter match any tag on the Squeak, the Squeak is excluded from the Team's feed.	A Team has Tuned In to the Maintenance Team User account. The Team has a label Exclude Filter of "Line 1." The Maintenance Team User account generates a Squeak with the tags "Line 1," "Line 2" and "Assembly." Because the Team is set up to exclude messages with the tag "Line 1," this message will be excluded.	A Team has Tuned In to the Maintenance Team User account. The Team has a label Exclude Filter of "urgent." The Maintenance Team User Account generates a Squeak with the tags "urgent" and "assembly." Because the Team is set up to exclude messages with the tag "urgent", this message will be excluded.
Labels	Matches the string to the labels on the Squeak. Individual label values should be comma separated. If one or more of the labels in the Filter matches a label on the Squeak, the Squeak is excluded from the Team's feed.	A Team has Tuned In to the IT User account. The Team has a message Exclude Filter of "plant floor." The IT User account generates a Squeak with the message "The plant floor network will be shut down at 10AM for one hour." Because the Team is set up to exclude all messages with "plant floor" in it, that message will not display on the Team's feed.	A Team has Tuned In to the IT User account. The Team has a message Exclude Filter of "manufacturing". The IT User account generates a Squeak with the message "Help needed with manufacturing process 4f of Line 5." Because the Team is set up to exclude all messages with "manufacturing" in it, that message will not display on the Team's feed.

Notifications

Users receive notifications if they are enabled on both the Squeak and the user's Account. There are two different types of notifications.

Type	Description
Email Notifications*	These are notifications emailed to the email address associated with the user's account. Email notifications can be disabled in "User Preferences."
Push Notifications*	These are notifications sent directly to a mobile device running the Squeaks application. Push notifications can be disabled in "User Preferences."

*Email and Push notifications must be enabled by the SQUEAKS Administrator.

Notifications are generated for a user based on the following rules.

Name	Description
Subscription	If the user is a subscriber to the message source, either through membership with a Team that includes Tune Ins and Filters that capture the message, or through directly Tuning In a User or Data Source. Any new Squeaks, edits or activity on the Squeak will generate a notification for the user. A user can also subscribe directly to a Squeak by clicking "Tune In" in the additional options menu on the Squeak.
Interaction	If a user has interacted with the Squeak. This includes clicking the star icon on the Squeak, claiming the Squeak, pinning the Squeak or commenting on the Squeak. A user can also simply choose to subscribe to the Squeaks notifications by clicking on the options menu on the Squeak and clicking "Tune In."
Ownership	If the user generated the Squeak. The user will receive notifications of all activity on the Squeak.
Inclusion	If the User is mentioned in the Squeak, or the User is the target of escalation through a Squeak Workflow. Mentions are covered in more detail below.

Mentions

Mentions can be used to draw the attention of a specific User to a Squeak. By typing a User name into the body of the Squeak or Comment, proceeded by the "@" sign, the User will then be mentioned in the Squeak, generating a notification to that User by whichever notification channels the User has enabled.

When SQUEAKS detects that the user is attempting to add a Mention to a Squeak (typing the @ symbol, for example) SQUEAKS will populate a list of available User accounts. Selecting a User account form the list will auto-complete the Mention.

Tuning In/Out a Squeak

SQUEAKS allows a user to explicitly Tune In or Tune Out a Squeak. When a user has Tuned In a Squeak, the user will receive notifications for Comments or status changes on the Squeak and the Squeak will show up in the users "My Squeaks" feed. If a user no longer wishes to receive these notifications or see the Squeak in the users feed, the Squeak can be Tuned Out. This does not affect other users receiving notifications from the Squeak, even if they are members of the same Team.

To Tune In or Tune Out a Squeak, click on the additional options menu and choose the desired option.

Tuning In the Source of a Squeak

If a User wants to Tune In to all Squeaks generated by the source of a particular Squeak, the User can do this by clicking the additional options menu on the Squeak, and clicking “Tune In [Source]” where the [Source] is the name of the User or Data Source that generated the Squeak.

Muting / Unmuting a Squeak

If a user no longer wishes to receive notifications on a Squeak, but still wants the Squeak to remain visible in the “My Squeaks” feed, the user can Mute the Squeak. This stops all notifications for the user, but does not change any other behavior on the Squeak. A Squeak can be muted or unmuted by clicking on the additional options and choosing “Mute” or “Unmute.”

Shifts

Shifts can be used to specify times when specific people are working, so that users are only notified of events during their assigned Shift times. Shifts are defined in the Administrators menu, then users can choose the appropriate shift for their account. A single Squeaks instance can have multiple shift schedules (for example, there may be more than one department and each may have its own schedule). As a result, first the desired Shift Profile has to be chosen, and then the specific Shift. For details about creating a Shift Profile, see the Administrator's Guide.

IMPORTANT! | **Once a Person is added to a Shift, he or she will no longer receive any push notifications or email notifications outside of the specified Shift. This includes mentions, tuned-in Squeaks and escalation rules. Only join a Shift to limit notifications exclusively to that Shift.**

Joining a Shift

To join a Shift, open your Profile menu (see the section titled "Editing User Profiles" for details on the Profile menu) and find the General section.

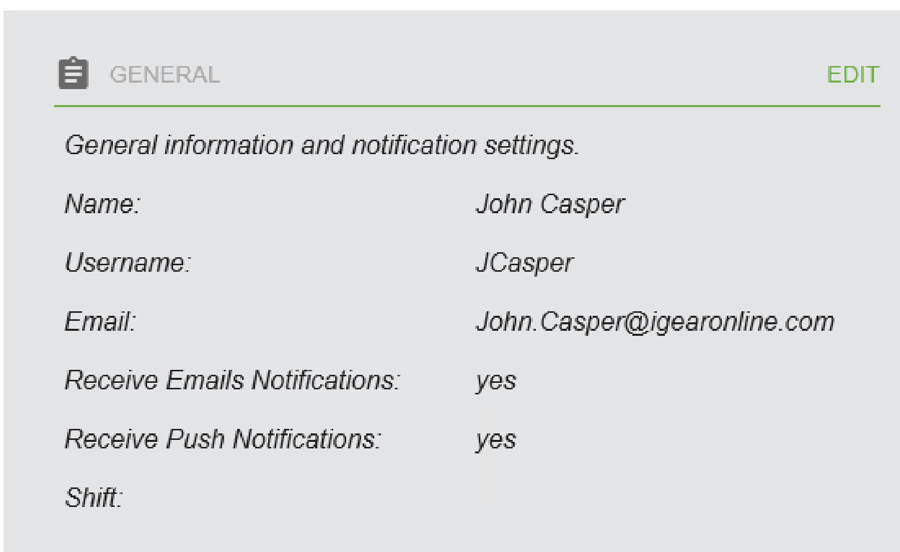


Figure 28 - User Profile General Settings

Click "Edit" to edit the general settings. First choose the desired Shift Profile, and then the desired Shift.

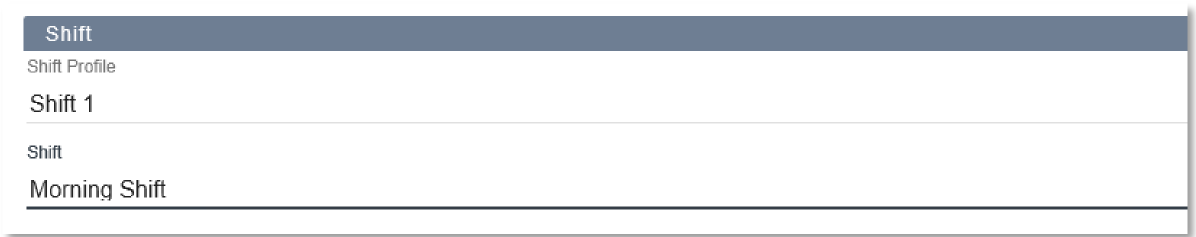


Figure 29 - Shift Profile and Schedule Selection

Click “Save” to close the Profile panel and join the Shift.

Creating a new Squeak

Squeaks are created by clicking the new Squeak icon () in the header bar of the SQUEAKS application. This will open a drop down that allows the user to choose the type of Squeak that will be created. There are three types of Squeaks.

Type		Description
Message		A standard SQUEAKS message. Messages can have Workflows, Escalation Rules, attachments, comments and all of the standard features of a Squeak. The content displayed in the body of the message and any image or video attachments.
Call For…		The Call For Squeak Type generates a new Message type Squeak from a template created in advance. Call For templates are created in the Administrators Menu and are intended to make the process of creating a common Squeak repeatedly simpler by providing a template for the Squeak. This feature is most commonly used in situations where a Squeak would "call" a specific person or team to alert them of a recurring problem.

If a specific Team is selected when creating a new Squeak Message, the Squeak will target that Team by default, but a different targeted Team can still be selected from the *New Squeak* window.

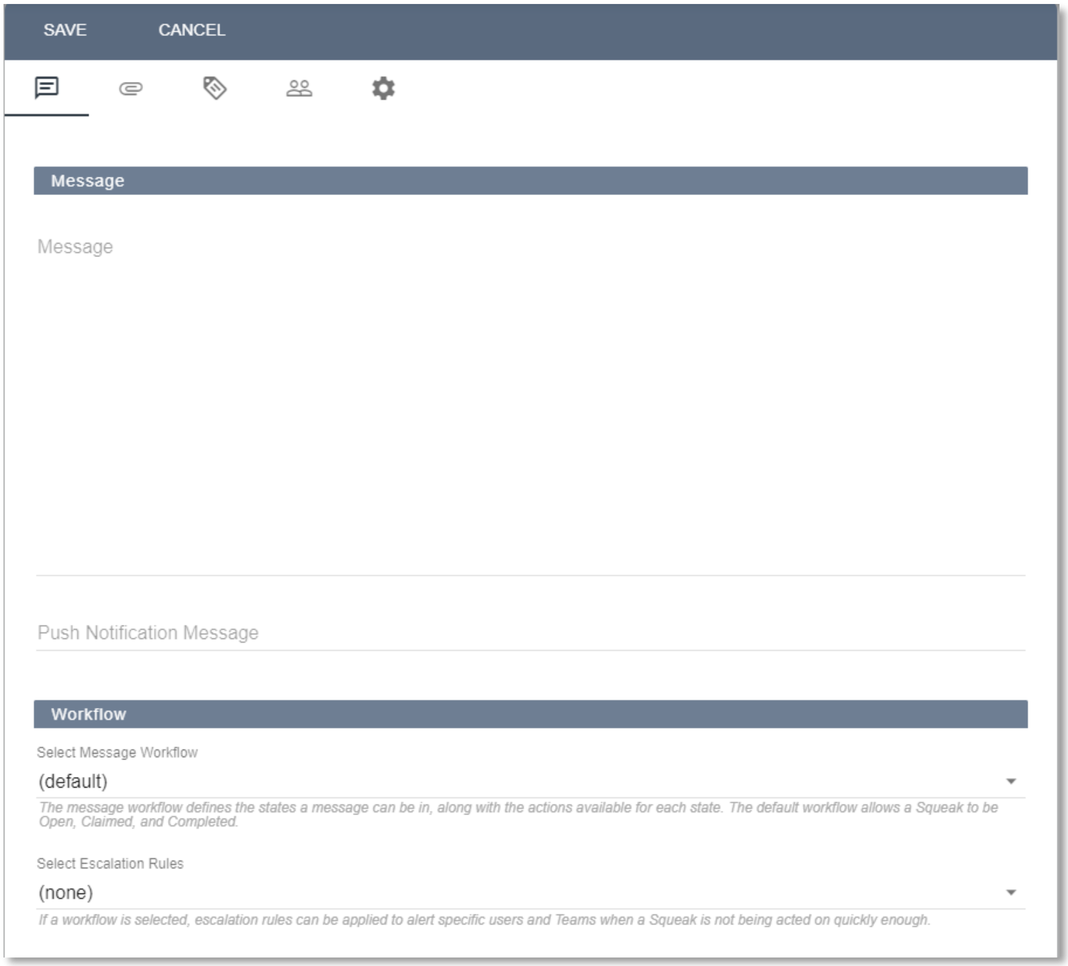
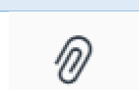


Figure 30 - New Squeak Window

Name	Icon	Description
Message		The body of the Squeak. Tags and Mentions can be entered into the body of the Squeak using the "#" or "@" prefixes, respectively. This is also where the Workflow is specified (if desired) and an Escalation Rule for the Workflow can be chosen. See the section on Workflows for details.
Attachments		The attachments window is used to add file attachments to the Squeak. Video and image files are included in the body of the Squeak, and other file types are included as downloadable files in the footer.
Labels		Labels can be configured and added to the Squeak in the labels window. Pre-defined templates are available on the right hand side and can be selected, or a new Label can be defined by clicking "+ ADD LABEL." Labels can be customized by text, color and background color.

Targeted Teams		Allows you to select one or more teams to target with the Squeak. Targeted Teams will be notified of the Squeak and the Squeak will show up in the Team's Squeaks panel. The Team will now be tuned-in to the Squeak.
Options		The options screen allows for toggling the following options on the Squeak: • Show footer details (number of comments, number of attachments, etc) • Allow users to post Comments. • Notify users via emails. • Notify users via push. All of them are enabled by default.

NOTE | **SQUEAKS Multiview supports 4K resolution videos, however, if a video is uploaded as a 4K video it must first be processed and encoded by SQUEAKS. This may take up to 10 minutes on some servers, and videos are processed in the order they are uploaded.**

Targeting a Specific Team

When a Squeak is created from the website or the mobile application, it automatically targets the Team that was selected at the time the Squeak was created. In addition, one or more Team's can be chosen as the "Target" of the Squeak in the "Targeted Teams" tab of the New Squeak window. When a Team is targeted by a Squeak, the application will notify all members of that Team that a new Squeak was created. If push notifications and email notifications are enabled for the Team and Users in the Team, then the Users will receive push and email notifications. These targeted Squeaks will act the same as a Squeak that is included in the Team's feed based on Filters and Tune Ins, this includes receiving notifications on Comments, edits, claims and releases.

Metric Tokens

Metric Tokens make it possible to include Metrics in the body of the Squeak without having to type out the Metric values manually. This is done by including the tokens in the body of the Squeak. The available tokens are as follows.

Type	Token	Description
Value	$Metric, {$Metric}	Puts the current value of the Metric into the Squeak in place of the token. The value will be displayed in the format "Name:Value" where the "Name" is the label of the metric and the "Value" is the metric's current value. If the Metric does not have a label specified, then the full Metric name is used instead.
Table	[$Metric]	Puts a table of values for the Metric into the Squeak. The table includes the following columns.

		• Current Value • Previous Value • Value Change • Last update time
Chart	($Metric)	Generates an image of the Metrics currently defined chart and ads it to the Squeak as an attachment. The chart will use the settings of the Metric to generate the chart.

Call For Templates

When creating a new Squeak, one of the options allows the user to choose a Call For template. Cal For Templates represent a pre-defined Squeak Message that is created automatically when the corresponding template is chosen. To use a Call For template, click the “New Squeak” + button and choose the “Call For…” menu item. Then select the desired template from the drop down and click “Ok” to create the Squeak.

In order to create a new instance of a Call For Squeak, the User must be a member of the Template. If the User is not a member of the Template, the Template will not show up in the list of Templates available for the user. This is setup in the properties of the Call For Template. See the **Squeaks – Administrator’s Guide** for details on creating a Call For Template.

Dashboards

Dashboards are managed and created from the *Home* navigation item by clicking the *Manage…* button at the top of the Panel. This will open the *Manage Views* window. From there, clicking on "New Dashboard…" will open the *New Dashboard* window.

Full details on creating and editing Dashboards is located in the **SQUEAKS Dashboards Guide.**

User Preferences

The *Preferences* panel is used to set common User preferences. The User Preferences panel is accessed by clicking on the *Preferences* menu item in the left-hand navigation panel. The following User Preferences are available.

Type	Description
Metric Order	Sets the default Metric ordering for this User in the Metrics list. This impacts the order that Metrics are displayed in all of the Metrics display panels except for the *My Metrics* display panel.
Metric Change Column	Specifies if a "Change" column should be displayed in the Metrics panels for this User. The drop box has three options. • *Don't Show Change* – No change column is displayed. • *Delta* – A change column is displayed and it shows the raw value change since the last value. • *Percent Change* – the change in the metric value expressed as a percent of the previous value.
Dashboard Theme	Specifies the default display theme for all Dashboards for this User. The available themes are as follows. • Light • Medium • Dark
Receive email notifications.	When this is UNCHECKED, the User will not receive notifications via email.
Receive push notifications.	When this preference is UNCHECKED, the User will not receive push notifications for the mobile phone application.

Editing User Profiles

SQUEAKS allows users to edit their own User Profile as well as certain other settings from the User Profile panel on the right hand side. This section outlines these features and how they are used.

Accessing the User Profile

The User Profile preferences can be accessed by clicking the profile picture in the top right corner of the screen (**Figure 33**).

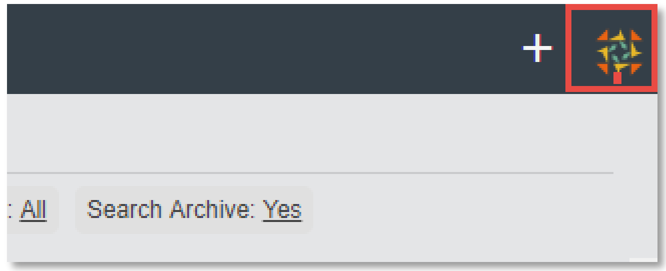


Figure 31: SQUEAKS profile button

Profile

The profile can be accessed by clicking the “Profile” button on the User Preferences panel. The password for the User can be changed in this window by clicking the “Change Password” button. The following sections are available in the User Profile panel.

Name	Icon	Description
General		Used to edit the first name, last name, email, and username associated with the User. This is also where the *Profile Image* can be set.
Change Password		Opens the *Change Password* window where a new password can be set for the User.
Notifications		Used to change the User preferences for notifications. These can also be changed from the profile panel. See the section titled *User Preferences* for more details on these settings.
Call For Templates		The list of Call For Templates this user has available when creating a new Call For message. This screen allows the User to enable or disable all of the available Templates in the system.
Listeners		Displays a list of all the accounts that are Tuned In to the logged in User. This is only informational and no changes can be made from this screen.
Keys		Keys are used to integrate CONNECT[dtu] with SQUEAKS. For more information on how to do this, view the document “Generating a Squeak from CONNECT.” The User can request a new key by pressing the “Request New Key” button.
Tune In / Out		Displays all of the Users, Data Sources and Teams in the system. Ones that the User is tuned into will show up at the top of the list with a checked checkbox next to them. Checking or unchecking the checkbox will tune in or tune out the source.
Advanced (admin only)		If the User is an administrator, the User has access to the advanced tab. This allows the User to change whether or not the account is an administrator of SQUEAKS, if the User is active and can login, or if the User is locked and cannot login. For details on these options, see the *Advanced Profile Options* section below.

Advanced Profile Options

The advanced profile options are available to administrative Users accessing a User profile window. This can be the Administrator’s own User account or when editing another User’s account. The following is a detailed explanation of the advanced profile options.

Status	Description
This user is locked and cannot login	A locked account cannot login until the locked status expires on its own after 2 hours, or until it is manually unlocked by an Administrator. A User account is locked if it attempts to login too many times with an incorrect password.
Administrator	Indicates if the User account is an Administrator of the SQUEAKS application. Administrators have access to additional configuration menus and options that a standard User does not.
View Only	Indicates that the User is only allowed to view and may not publish Squeaks.

SQUEAKS Query String Options

This is the full list of SQUEAKS query string options.

Name	Description	Format
Data Source	Specifies the active data source. The value passed in is the name of the data source, exactly as it appears in the navigation bar. "All", "Everything" and "Explore" can be passed in as a valid data source to show the Explore panel. Teams, Users and Data Sources can be looked up by name using the following format. • Teams([team name]) • Users([user name]) • DataSources([data source name]) To load the *Home* panel with a specific Dashboard displayed, pass in the following value: Home([Dashboard name]).	http://{servername}:{port}?Source={datasourcename} **Example:** http://localhost?Source=All **Example 2:** http://localhost?Source=Teams(Safety) **Example 3:** http://localhost?Source=Home(MyDashboard)
Key	Specifies the user authentication information so that no one has to manually login to SQUEAKS form the browser window. The find the authentication key, view the users profile and select the "keys" tab.	http://{servername}:{port}?Key={key} **Example:** http://localhost?key=dzMNfUkvNS5R667FByHDow0grqrbXjhwzSOBaYTrzmZHbwOZaMm80Q==
Kiosk Mode	In Kiosk mode the header bar, including the navigation bar, is hidden and the main display area expands to occupy the entire browser window. To launch SQUEAKS in kiosk mode, include the query string variable "kiosk" in the server url after "main."	http://{servername}:{port}?kiosk **Example:** http://localhost?kiosk
Show Source Header	This key specifies that the source header should be displayed even if the application is in kiosk mode. This key is typically only provided if the site is in kiosk mode.	http://{servername}:{port}?kiosk&showheadermode

		Example: http://localhost?kiosk&showheadermode

NOTE | **Multiple query string options can be passed in at the same time by separating them with an "&." For example, to load the site in kiosk mode, with a data source selected and a user authentication key passed in, use the following format.**

http://{servername}:{port}?Key={key}&kiosk&source={datasourcename}&key={key}