OSI Color Reference Manager

User Manual

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Sealant Browser

The primary scope of the software is to search for known sealant matches for colors that Cedar Siding determined a match for in the past. You have a few different ways to view color matches stored in the database. You may perform basic searches, advanced searches, or view all matches by manufacturer. After retrieving results from searches you can then export these results to an HTML or CSV file.

Basic Searches

A basic search will be the easiest to use when looking for a match quickly. From the Sealant Browser menu select "Search for Colors". By default this screen will show no results. Enter the name of a color or other keywords in the search box and click the Go button. If results were found they will be displayed on screen. In basic searches keywords are checked against the color name and color reference fields. Sealant matches are color coded to show who stocks the particular sealant. Black means it is stored locally at CSI, blue means it must be ordered from the vendor, and red means it must be ordered directly from the manufacturer.

Advanced Searches

Sometimes you may wish to specify more criteria beyond what will be done with a basic search. In this case an advanced search will be more suitable. Using the advanced search you can do more robust searches than what can be done with the basic search. For example: you can use the advanced search to find all colors with a match of OSI sealant 001 within a certain manufacturer. From the Sealant Browser menu select "Advanced Search". This will load the advanced search form. Each field is labeled and has a small description on how to use it. Once you have selected all of your criteria click the Search Colors button to view results matching your criteria. Like the basic searches the advanced searches show color coded sealant matches depending on where a sealant is stocked.

Browsing by Manufacturer

An occasion may come up where you are interested in simply browsing colors stored in the database instead of searching for them. You can do this by browsing available colors based on their manufacturer. From the Sealant Browser menu select "Browse Colors by Manufacturer". When the screen loads no manufacturer will be selected. Use the manufacturer drop down box to pick from the available manufacturers. Once you have a manufacturer selected all records for that manufacturer will load on screen.

Catalog Administration

In order to have sealant matches to search for records must actually exist. If your access permissions allow it you can utilize the catalog administration functions. This section allows you to add colors, edit colors, manage sealant options, and more.

Adding Colors

Adding a color is fairly straightforward. A color is ready to be added when you have a sealant match (or must coat) selected for a color. From the Catalog Administration menu select "Add New Color". Use the form that loads to add colors to the database. You are required to enter a color name and select the manufacturer it belongs to, otherwise you will be given an error message. Once you are finished click the Create Color Entry button to submit the color to the database. If the color already exists under the manufacturer you entered then that color will be updated with the new information provided.

Adding and Editing Manufacturers

Manufacturers must be created before assigning colors to them. From the Catalog Administration menu click "Manage Manufacturers". This will bring up a listing of all manufacturers currently in the database in alphabetical order. From this view you can edit a manufacturer's name, delete a manufacturer that isn't needed, and create a new manufacturer you wish to assign colors to. To create a manufacturer type in the manufacturer's name in the text box and then click the Create New Manufacturer button. The manufacturer will then be added to the list. Each existing manufacturer has an "Edit" and "Delete" link you can use to change a manufacturer's name or delete the manufacturer record. Note: you cannot delete a manufacturer that has colors assigned to it.

Managing Colors

Over time colors may need to be changed if a better sealant match is found, some may have erroneous information, other may need to be deleted. Therefore options are available to make changes to color records once they are placed in the database. From the Catalog Administration menu select "Manage Colors". By default this view shows no color records. Similar to the basic search, enter keywords to search and press the Go button. (Note: if you have already performed a basic or advanced search the results from that search will show up in this view automatically.) Once results are shown you can see that last time a record was modified and the user that modified it. There will also be links to edit or delete a color.

Upload Colors File

There will be times when several colors are ready to be sent to the database. A colors file can be created and uploaded to the server to facilitate the addition (or modification) of multiple records at once. Start by downloading a blank colors file from the home page. (Note: you will only have the option to download this file if you have permissions to add colors to the database.) Save this file on your computer and open it will a spreadsheet program (e.g. Excel). This file contains six columns and one row that specifies what piece of information goes in each column. Do not remove this first row prior to uploading the file. The server will use this row to help verify what kind of file it received.

The remainder of rows can be filled out with color information. Each records can have a color name, a manufacturer, a color reference, a sealant match, a sealant must coat, and an LRV. The manufacturer and color name fields are required, one or both of the match and must coat fields are also required. All other fields are optional. If any of the required fields are missing or invalid the entire row will be skipped. Any new manufacturers or colors are automatically added to the database. Any color that already exists under a manufacturer will be updated with the new information provided.

Manage Sealant Options

In order for sealants to be assigned to colors they must first exist in the database. The manage sealants forms is used to create listings of sealants that specify which sealants are stocked by Cedar Siding, which sealants are stocked by our regular vendor, and the total listing of sealants offered by the manufacturer. These lists will dictate the color coding seen in the color searches. Enter each sealant into it's list, one per line, and click the Update Inventory Option button. (Note: any sealants that are put into the CSI Stock and Vendor Stock fields are automatically added to the Manufacturer Stock listing.)

Like the colors, sealant records are plentiful and may need to have several changes made to them. Therefore instead of editing single records you may upload a sealant file with each listing of sealants in the file. Start by downloading a blank sealants file from the home page. (Note: you will only have the option to download this file if you have permissions to manage inventory options.) Save this file on your computer and open it will a spreadsheet program (e.g. Excel). The file contains three columns and one row that specifies the various stocking options. Do not remove this first row prior to uploading the files. The server will use this row to help verify what kind of file it received.

Enter each sealant option in the correct column. The first column is sealants stocked by Cedar Siding, the second column is sealants stocked by our regular vendor, and the third column is sealants stocked by the manufacturer. When this file is uploaded it is processed and changes are made. A master file with the currently listing of all sealant options is generated.

Account Administration

In order to be able to access the system users must first have credentials to login to the system with. In order for users to have any access to program features they must also be associated to a permissions mask. You must have permissions to change user accounts to access these features.

Managing Users

Edit and create user accounts you will need to user the user account manager. From the Account Administration menu click on the “Manage User Accounts” option. A listing of all current users will be shown. From this view you can edit and delete existing accounts or reset a user's password. Click the Create New User button to create a new account. When creating a new user you must specify the user name, a password, a permission mask to use, and the user's account status.

Managing Permission Masks

Each user is required to have a permission mask. By default when the software is installed a built-in mask with all permissions granted is created. However custom permission masks with specific permissions granted or denied can be created. From the Account Administration menu click on the “Manage Permissions Masks” option. This will bring up a list of all existing permission masks in the system. You may edit or delete existing masks. To create a new permission mask click on the Create Permission Mask button. When creating a permission mask you simply need to specify the name of the mask and which permissions are allowed.

Database Administration

The database contains all records used by the program. Being that the database isn't immune from fault methods must be put into place that allow the database records to be backed up and restored. These features are only available if you have permissions to edit the database.

Database Backup

Backing up the database is a quick and easy process. From the Database Management menu click on "Database Backup Utility" option. A form will load and you will need to specify a label to give the backup. Optionally you can scramble your backup information by clicking the "Yes" option next to encryption. If you decide to use encryption you can also create your own "encryption key". The encryption key allows you to specify a small phrase of text to help scramble the data and acts like a password of sorts. However, make sure that you do not lose or forget the key otherwise the data will not be able to be decrypted when attempting to restore from the archive. When you are finished filling out the information click the Create Backup File button. A backup file will be generated and you will be provided with a download link. You may download the file to store on your computer and a copy will be kept on the server incase it is needed in the future.

Importing a Backup

In the case of a database fault of some kind you may choose to restore the database from a previous backup. From the Database Management menu click on the "Import/Restore Database" option. Importing only requires the database archive and the decryption key, if applicable. Once you have entered the information click the Import Database button. You will be prompted to confirm the changes you are about to make. If you accept and the backup archive is valid the import process will begin and you will be notified if it is successful. It is worth mentioning that the import process may take a short period of time or a couple minutes depending on the size of the backup archive being imported.

Database Connection Reset

The software comes equipped with a method to restore the database connection file if the reason to do so ever happens. From the Database Management menu click on the "Restore Database Connection" option. A form will appear where you can enter in all of the relevant information needed for the database. You will need the name of your database, the database server hostname, the login credentials, and the current database recovery password. You will also need to provide a new recovery password to help secure the file that will be generated. When you have filled out the form click the Configure Database button. Your settings will be tested to make sure they work and the recovery password will be challenged to ensure that you can change the database file. If everything checks out a new database.ini file will be created.