

MET/TEAM Software

Operation and Reference Guide

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System Requirements

For MET/TEAM® (MET/TEAM® is Fluke Corporation's registered trademark in the USA and/or other countries or regions) to operate properly, some required frameworks and other software packages must be installed on the server and some client computers. These prerequisite packages are detailed in the sections that follow. The Fluke Calibration Software download and media include all the necessary prerequisite software packages. Individual installation files that you download from the web may not contain the prerequisite software packages. To install correct prerequisite software packages, you must always use the full installer for new installations and major upgrades.

Note: Always run Windows Update after the installation process is complete. This action updates your system with the latest security patches.

The MET/TEAM Server, MET/TEAM Customer Portal, and MET/TEAM Mobile software are only supported on the following platforms:

- Windows 8.1 (64-bit)
- Windows 10 (64-bit)
- Windows Server 2012 R2 (64-bit)
- Windows Server 2016 (64-bit)
- Windows Server 2019 (64-bit)

Note: Attempts to install and run MET/TEAM Server on other operating systems including "Home" editions of Windows is not supported.

Security Warning

This software is not intended to be made accessible over the public internet or any publicly available network. The application should be hosted only within a secured, isolated internal network protected by appropriate firewalls and access controls. Failure to follow these guidelines may result in unauthorized access, data breaches, or system compromise.

The MET/TEAM Server database must be hosted by:

- SQL Server® 2012 (64-bit)
- SQL Server® 2014 (64-bit)
- SQL Server® 2016 (64-bit)
- SQL Server® 2017 (64-bit)
- SQL Server® 2019 (64-bit)

The Express edition of SQL Server® should be sufficient for stand-alone or small networked databases. For larger databases, it is recommended that you use a full version of SQL Server®. Installing the MET/TEAM Server database on a 32-bit version of SQL Server® is not supported. The MET/TEAM Server installation ensures Microsoft® Internet Information Services (IIS) is configured on the server for hosting the MET/TEAM and/or Customer Portal websites and/or MET/TEAM API.

When deployed as a client/server system, the MET/TEAM website can be accessed from any computer on the domain that is running a compatible web browser. MET/TEAM is compatible with all modern web browsers that support HTML5 such as Microsoft® Internet Explorer, Microsoft® Edge, and Google Chrome.

The MET/CAL Runtime and MET/CAL Editor client software run on a variety of platforms:

- Windows 8.1
- Windows 10
- Windows Server 2012 R2
- Windows Server 2016
- Windows Server 2019

Note: Prior versions of Microsoft® Windows are no longer supported.

The Fluke Calibration website contains any information on requirements that may have changed since the Help was updated. Refer to <http://us.flukecal.com/>.

Hardware Requirements

The minimum hardware requirements are as follows:

MET/TEAM Server

Database and Web Server (single machine)

- 2.0 GHz quad core processor or equivalent
- 16 GB of RAM
- 20 GB of available hard drive space (depending on database size)

Web Server (separate machine from Database server)

- 2.0 GHz quad core processor or equivalent
- 4 GB of RAM
- 3 GB of available hard drive space

Database Server (separate machine from Web server)

- 2.0 GHz quad core processor or equivalent
- 16 GB of RAM
- 20 GB of available hard drive space (depending on database size)

MET/TEAM Client

- 1.0 GHz Pentium 4 processor or equivalent
- 2 GB of RAM
- Minimum screen/display resolution listed is 1024x768

MET/CAL Client

- 2.0 GHz Pentium 4 processor or equivalent
- 4 GB of RAM
- 6 GB of available hard drive space

The optional General Purpose Interface Bus (GPIB) connects a PC to a programmable instrument. Before installation, make sure that the optional GPIB (IEEE 488) Interface is installed. Fluke Calibration Software only supports GPIB controllers from National Instruments.

You can download hardware drivers from the National Instruments website:

<http://www.ni.com/support/>.

If you plan to use or calibrate National Instruments PXI cards, the PXI chassis must be connected to the workstation computer before the computer is powered on. Also, any time you need to insert or remove cards from the PXI chassis, the workstation computer that the PXI chassis is connected to must be powered off first. For more information, visit the National Instruments website: <http://www.ni.com/pxi/>.

The Fluke Calibration website contains any information on requirements that may have changed since the Help was updated. Refer to <http://us.flukecal.com/>.

MET/TEAM Mobile Requirements

This document briefly outlines the recommended way to configure a MET/TEAM Server installation with the necessary settings for MET/TEAM Mobile to operate properly. This document does not provide detailed information on how to accomplish each step, but indicates what must be done.

Configuring Active Directory

- Create a security group for 'METTEAM Mobile Users'.
- Add user accounts for all MET/TEAM Mobile users to this security group.

This step is **optional** but recommended when there will be many MET/TEAM Mobile users and/or the list of MET/TEAM Mobile users will change over time. If there is only a small number of MET/TEAM Mobile users that will not change, you can use individual user accounts instead of a security group.

Configuring the MET/TEAM Server Machine

- Configure the 'metcal' share properties as follows:
 - Share Permissions – Make sure either 'Everyone' (default) or the 'METTEAM Mobile Users' security group (or individual users) is configured with Full Control.
 - NTFS Permissions – Add 'METTEAM Mobile Users' security group (or individual users) and give it Full Control.
- If the MET/TEAM website is using HTTPS, the Mobile Check Out process will attempt to automatically discover the thumbprint (hash) of the SSL certificate being used. In cases where the certificate cannot be automatically discovered, the following setting may be added to the web.config file's <appSettings> section:


```
<add key="SslCertHash" value="paste SSL certificate thumbprint value here" />
```

 - The thumbprint for an SSL certificate can be found using the Certificate Manager and opening the Properties dialog for the certificate.

Configuring the Main SQL Server® Machine

- Make sure SQL Server® is configured to allow remote connections as indicated in the MET/TEAM Installation Guide (TCP/IP protocol enabled, SQL Browser service running, Windows firewall configured, etc.)
- Use SQL Server® Management Studio to create a login for the 'METTEAM Mobile Users' security group (or individual user accounts).
- Either give this login the 'sysadmin' role, or create a user for the 'metteam' database using the 'METTEAM Mobile Users' security group (or individual user accounts) and assign this user the 'db_owner' role.

Note: The main SQL Server® machine may or may not be the same machine as the MET/TEAM™ Server machine.

Configuring MET/TEAM Mobile Machines

This process must be repeated on each machine that is intended to run MET/TEAM Mobile.

- Install SQL Server® on each MET/TEAM Mobile machine. They must use the same version of SQL Server® as the server. It does not matter what edition is installed on each machine (i.e. Standard, Enterprise, Express, etc.) unless the database is over 10 GB, in which case SQL Server® Express cannot not be used.
- Be sure to follow the instructions for installing SQL Server® on a MET/TEAM Mobile machine exactly as found in the MET/TEAM Installation Guide. Failure to follow the instructions exactly will prevent MET/TEAM Mobile from working properly.
- Run the MET/TEAM Mobile Prerequisites installer on each MET/TEAM Mobile machine. The installer is located on the 'metteam' share on the server (\\<server>\metteam\Installers\Mobile).
- Use SQL Server® Management Studio to create a login for the 'METTEAM Mobile Users' security group in the local SQL Server® instance and give it the 'sysadmin' role (if this was not done during installation of the MET/TEAM Mobile Prerequisites).
- Make sure the SQL Browser service is running. Use SQL Server Configuration Manager to check and/or start this service, if necessary.
- Make sure the Windows® user account is configured as an Administrator on the local machine.
- If MET/CAL is to be run on a MET/TEAM Mobile machine, install the MET/CAL Runtime and/or MET/CAL Editor by running the MET/CAL Client installer on the mobile machine. The installer is located on the 'metteam' share on the server (\\<server>\metteam\Installers\METCAL).

Configuring MET/TEAM Settings

- Make sure the settings on the Mobile Configuration dialog (Configure > Mobile Configuration menu item) are correct. The directory settings were set when MET/TEAM was deployed.

MET/TEAM using Windows Authentication or SAML2 Authentication

Using Windows Authentication or SAML2 Authentication causes MET/TEAM to bypass the MET/TEAM Log-In screen. The following requirements must be met to use the Windows Authentication or SAML2 Authentication with MET/TEAM.

1. You must configure IIS to support the correct type of authentication.
2. You must activate and configure the System Default [Login – Use Windows Authentication](#).
3. You must match the MET/TEAM user account's username to the person's Windows username or SAML2 username.

The exact steps for configuring MET/TEAM are different for each type of authentication.

Windows Authentication

MET/TEAM and Customer Portal can be configured to use Windows Authentication. The Windows Authentication configuration process fairly simple.

The sections below give detailed information on how to set up MET/TEAM. These things also apply to Customer Portal.

Configure IIS for Windows Authentication

Configuring IIS as described below will allow all major browsers to handle NTLM authentication and to automatically log you in.

- Open IIS
- Select the MET/TEAM website in the list
- Double click "Authentication"

- Disable *Anonymous Authentication*
- Disable *Forms Authentication*
- Disable *ASP.NET Impersonation*
- Disable *Basic Authentication*
- Enable *Windows Authentication*
 - Under “Advanced Settings” ...
 - Verify that “Enable Kernel-mode authentication” is selected
 - Make sure the “Extended Protection” setting is set to “Off” if using MET/CAL

With these settings, MET/TEAM will require browsers to do a windows NTLM negotiation before accessing the website.

Note: All client computers will have to be on the associated domain to access MET/TEAM.

Activating System Default Login – Use Windows Authentication

The System Defaults are found under the Configure menu System Defaults submenu. The Find System Defaults screen is opened. Locate the *Login – Use Windows Authentication* item. Activate by checking the Active checkbox.

- If you only want to enable Windows Authentication for MET/TEAM, enter **1** into the Value field.
- If you want to enable Windows Authentication for MET/TEAM and Customer Portal, enter **2** into the Value field.
- Click Save to save these changes.

When saving the changes, a check is done to ensure the server is a member of a domain. If it is not, the changes will not be saved. Following this check, another message is displayed indicating proper user accounts must be set up to avoid being locked out of MET/TEAM.

MET/TEAM Usernames with Windows Authentication Active

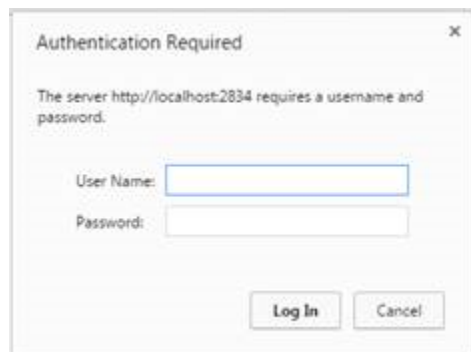
When Windows Authentication is active, MET/TEAM user accounts must be set up with their Active Directory (Windows) account username as the Username on the MET/TEAM User screen. Use the Setup menu Users submenu to enter the person’s Active Directory username for each account.

Approved By, Signatures, and Auditing with Windows Authentication Active

When Windows Authentication is active, Approved By, Technician Signature, and QC Signature require the user’s Active Directory password to be entered, not the user’s MET/TEAM password. The same applies to password prompts when Auditing is active with a Value of “0”.

Chrome Browser with Windows Authentication Active

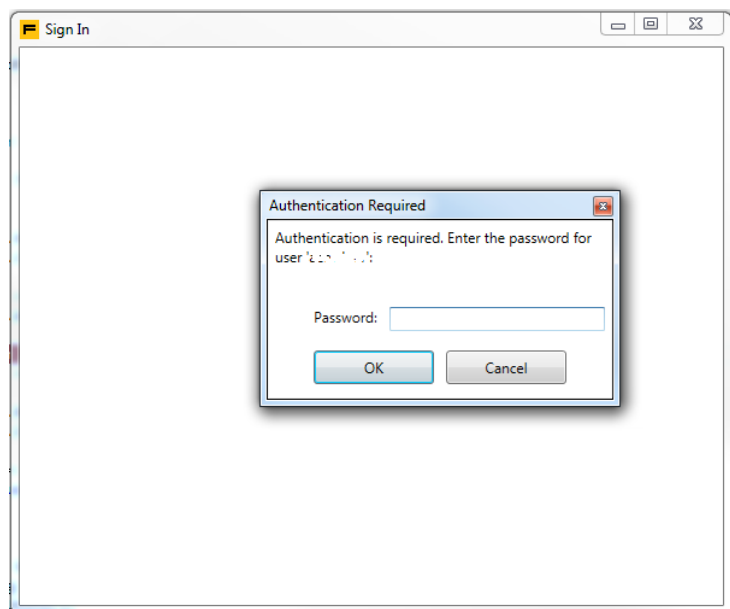
When using the Chrome browser and Windows Authentication, you are required to complete the **Authentication Required** dialog by entering your Active Directory credentials. This dialog is only displayed the first time.



MET/CAL with Windows Authentication Active

The metcal.ini file contains an entry for the MET/TEAM URL. This URL typically consists of the name of the server and the port, although it could be the fully qualified domain name (FQDN) and port or it could be the server's IP address and the port.

MET/CAL uses a Chrome based browser to access MET/TEAM web pages. For this reason, when the MET/TEAM URL includes a FQDN or IP address, you will be prompted to enter the Active Directory password for the current user.



Because MET/CAL does not attempt to cache this password, it must be entered every time MET/CAL is launched, including when being launched from a MET/TEAM Work Order.

To avoid this authentication prompt, change the MET/TEAM URL in the metcal.ini file to use only the server's name and port only (i.e. <http://myserver:35853>). Using this shortened URL should work, unless you are attempting to run MET/CAL over a VPN connection or in other specific situations.

Clicking Cancel on this authentication dialog will abort the login process and display an HTTP Error 401.2 message in the Sign In window. Simply close this window by clicking the red "X" in the upper right corner.

SAML2 Authentication

MET/TEAM and Customer Portal can be configured to use a SAML2 Identity Provider to enable Single Sign-On capabilities. The SAML2 Authentication configuration process requires more complex configuration.

The sections below give detailed information on how to set up MET/TEAM. These things also apply to Customer Portal.

Prerequisites

There are a few things that must be configured for SAML2 to work properly.

MET/TEAM must be configured to run as a secure (https) website. If MET/TEAM was installed as a non-secure website, there are some manual changes that need to be made. These include:

- Adding a https binding to the website using IIS and referencing a valid SSL certificate
- Removing the http binding
- Changing the website's SSL settings to Require SSL and ignore client certificates

- Replacing the web.config file with a copy of the “secure” web.config file (found in the installation media’s \Install\IISRootFolder\METTEAM\Secure folder). Be sure to copy the connection string, serial number and registration email settings from the old web.config file to the secure web.config file.

SAML2 Authentication will not work properly if the MET/TEAM website is configured for Windows Authentication.

Once these changes have been made, restart the MET/TEAM website and verify it is functioning properly.

Configure IIS for SAML2 Authentication

Configuring IIS as described below to ensure Windows Authentication is not enabled.

- Open IIS
- Select the MET/TEAM website in the list
- Double click “Authentication”
- Enable *Anonymous Authentication*
- Disable *Forms Authentication*
- Disable *ASP.NET Impersonation*
- Disable *Basic Authentication*
- Disable *Windows Authentication*

Configuring MET/TEAM for SAML2 Authentication

Now that MET/TEAM is running as a secure website, we can begin configuring the SAML2 settings.

In the web.config file, the following section needs to be added under the <configuration> node and after the <configSections> node:

```
<sustainsys.saml2 entityId="MET_TEAM_URL/Authentication/Metadata"
    returnUrl="MET_TEAM_URL" modulePath="/Authentication"
    authenticateRequestSigningBehavior="IfIdpWantAuthnRequestsSigned">
  <nameIdPolicy allowCreate="true" format="Persistent" />
  <requestedAuthnContext classRef="Password" comparison="Exact"/>
  <identityProviders>
    <!-- Uncomment this section after the placeholders have been updated
    <add entityId="IDENTITY_PROVIDER_URL"
        signOnUrl=" IDENTITY_PROVIDER_SIGNON_URL "
        allowUnsolicitedAuthnResponse="true" binding="HttpRedirect">
      <signingCertificate fileName="~/Saml2/CERTIFICATE_FILENAME.EXT"/>
    </add>
    -->
  </identityProviders>
</sustainsys.saml2>
<system.identityModel />
```

The following placeholders need to be replaced with the correct values for this website:

- Replace **MET_TEAM_URL** with the base URL for this website. For example, **https://myserver:443** or **https://metteam.company.com**
- Replace **IDENTITY_PROVIDER_URL** with the SAML2 Identity Provider’s identity URL. This will be given to you after the identity provider has been configured to support MET/TEAM.
- Replace **IDENTITY_PROVIDER_SIGNON_URL** with the SAML2 Identity Provider’s sign-on URL. This will be given to you after the identity provider has been configured to support MET/TEAM.

- Replace **CERTIFICATE_FILENAME.EXT** with the filename and extension of the certificate to use to sign SAML2 requests. This certificate file will be given to you after the identity provider has been configured to support MET/TEAM. The certificate file must be placed in the website's \Saml2 folder.
- The **classRef** and **comparison** attributes for the **requestedAuthnContext** setting may need to use different values, depending on your SAML2 Identity Provider.

Note that the settings under the <identityProvider> node are commented out initially, while setting up SAML2. These settings will need to be uncommented once the Identity Provider URLs and the certificate filename settings are in place.

Some SAML2 Identity Providers may require additional settings. Work with your company's IT department as the identity provider is being configured to determine if you need to configure additional settings, such as a Federation. Refer to the [Sustainsys documentation](#) for more details on available settings and how to use them.

Additionally, there is an optional setting that may need to be added to the <appSettings> section of the web.config file:

```
<add key="SamlClaimIdentityType" value="CLAIM_TYPE"/>
```

- Replace **CLAIM_TYPE** with the appropriate value specifying the claim to extract from the Single Sign-on process to use as the username when logging in to MET/TEAM. There must be an account set up in MET/TEAM with a matching username.

By default, MET/TEAM will use the claim identified with the type:

<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/nameidentifier>

but this may be changed so that the claim with the type specified by this setting is used. Another common setting that could be used is:

<http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress>.

Example:

```
<add key="SamlClaimIdentityType" value="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress" />
```

When logging in for the first time when using SAML2 Authentication, make sure the **ErrorLogVerbosity** setting has been set to **Detailed** in the web.config file. If the login is unsuccessful, the types and values for all of the claims are written to the MET/TEAM log file so that you can determine the correct type for the claim that should be used to extract the username from. Be sure to revert the **ErrorLogVerbosity** setting back to **Normal** once you have successfully configured SAML2 Authentication.

Configuring the SAML2 Identity Provider

Typically, you will need to work with your company's IT department to get the SAML2 Identity Provider configured to support MET/TEAM.

There are a few things that need to be known in order to get the SAML2 Identity Provider configured correctly:

- Application name
- Environment (dev, test, QA, production, etc.)
- Application Entity ID (or metadata file)
- Assertion Consumer Service (ACS) URL
- The users that need access to this application

The first two items need little explanation.

The Application Entity ID can usually be extracted from a metadata file. To get the metadata file from MET/TEAM, make sure the web.config file has been updated with the <sustainsys.saml2> information indicated above and the

MET_TEAM_URL placeholders have been updated. Open a browser and navigate to the following URL: **MET_TEAM_URL/Authentication/Metadata** (for example, **https://myserver:443/Authentication/Metadata** or **https://metteam.company.com/Authentication/Metadata**). This will download a small XML file to your computer. Rename this file as desired and send it to IT. It can be used to get the Application Entity ID.

The Assertion Consumer Service (ACS) URL for MET/TEAM is simply **MET_TEAM_URL/Authentication/Acs** (for example, **https://myserver:443/Authentication/Acs** or **https://metteam.company.com/Authentication/Acs**).

If access to MET/TEAM should be limited to specific users, request to have an Active Directory group created, and identify all the users that should be added to the group. This group can then be assigned to the SAML2 Identity Provider configuration. Otherwise, access can be allowed by any user, so long as a corresponding MET/TEAM User account has been created for that user.

Once the SAML2 Identity Provider has been configured, IT can provide you with the information needed to complete the <sustainsys.saml2> section in the web.config file as explained above.

- **IDENTITY_PROVIDER_URL** (for the *entityId* setting)
- **IDENTITY_PROVIDER_SIGNON_URL** (for the *signOnUrl* setting)
- **CERTIFICATE_FILE.EXT** (for the *signingCertificate* settings)

The signing certificate must be added to the website's \SAML2 directory and referenced in the web.config settings. The two URLs also need to be added to the web.config settings.

Once these placeholders have been updated, remove the comment markers from the <identityProviders> section so that the settings become active. Save the web.config file and restart the MET/TEAM web site.

For example:

```
<identityProviders>
  <add entityId="https://some.url.com/4013a491-a623-4ae6-a797-429efedb0572/Metadata"
    signOnUrl="https://some.url.com/4013a491-a623-4ae6-a797-429efedb0572/"
    allowUnsolicitedAuthnResponse="true" binding="HttpRedirect">
    <signingCertificate fileName="~/Saml2/saml2_certificate.cer"/>
  </add>
</identityProviders>
```

Configuring MET/TEAM and Activating SAML2 Authentication

After completing the sections above, launch MET/TEAM and log in using an administrator account.

Set up a user account for yourself, making sure to set the username to the correct value. If you are not sure what to use, it may be safest to use your email address and set the value of the <appSetting> **SamIClaimIdentityType** to **http://schemas.xmlsoap.org/ws/2005/05/identity/claims/emailaddress**. If you decide to change this later, you may do so before setting up user accounts for all other users. Set a password for this account. Although SAML2 does not use this password, it will be needed if you are using MET/TEAM Mobile.

If you are using Customer Portal, create a Contact and associate it with this user account.

Now you can configure the System Default setting that controls authentication - **Login - Use Windows Authentication**. The name of this System Default is slightly misleading, but it is used to control the type of login authentication used by MET/TEAM and Customer Portal.

To enable SAML2 Authentication:

- **Check the Active checkbox**

- Set the Value to either **3** (enable SAML2 for MET/TEAM only) or **4** (enable SAML2 for MET/TEAM and Customer Portal) as needed

Save the changes. A warning message is displayed to alert you that activating SAML2 Authentication without configuring the necessary settings may prevent you from being able to log in to MET/TEAM. Click OK. You can deactivate SAML2 Authentication by unchecking the Active checkbox and clicking Save.

With SAML2 Authentication active, log off and close the browser, then launch MET/TEAM again. You should be redirected to your SAML2 Identity Provider's login page to complete the login process.

MET/TEAM Usernames with SAML2 Authentication Active

When SAML2 Authentication is active, MET/TEAM users must be set up so that the Username matches the value of the claim from which the information is being extracted. Refer to the Configuring MET/TEAM for SAML2 section above for more details. Use the Setup menu Users submenu to enter the person's Username for each account.

Approved By, Signatures, and Auditing with SAML2 Authentication Active

When SAML2 Authentication is active, Approved By, Technician Signature, and QC Signature require the user's Single Sign-On password to be entered, not the user's MET/TEAM password. The same applies to password prompts when Auditing is active with a Value of "0".

MET/CAL with SAML2 Authentication Active

When SAML2 Authentication is active, when launching MET/CAL you should be redirected to your SAML2 Identity Provider's login page to complete the login process.

MET/TEAM Mobile with SAML2 Authentication Active

When SAML2 Authentication is active, the MET/TEAM Mobile Check Out process will configure the MET/TEAM Mobile website to use MET/TEAM Authentication on the mobile workstation, since there is no guarantee that the SAML2 Identity Provider will be accessible. During logon, the standard MET/TEAM Login page is displayed. Enter the username of the account that was created for the SAML2 login (this may use your email address as the username) and the MET/TEAM password that is associated with this account (not your Active Directory or Single Sign-On password).

While using the MET/TEAM Mobile website, the Technician Signature and QC Signature on the Work Order also require the selected user's MET/TEAM password to be entered. The same applies to password prompts when Auditing is active with a Value of "0".

MET/TEAM Security

For security questions related to product installation, refer to the Fluke Calibration Software Installation Guide. This guide explains the required security needed related to installation.

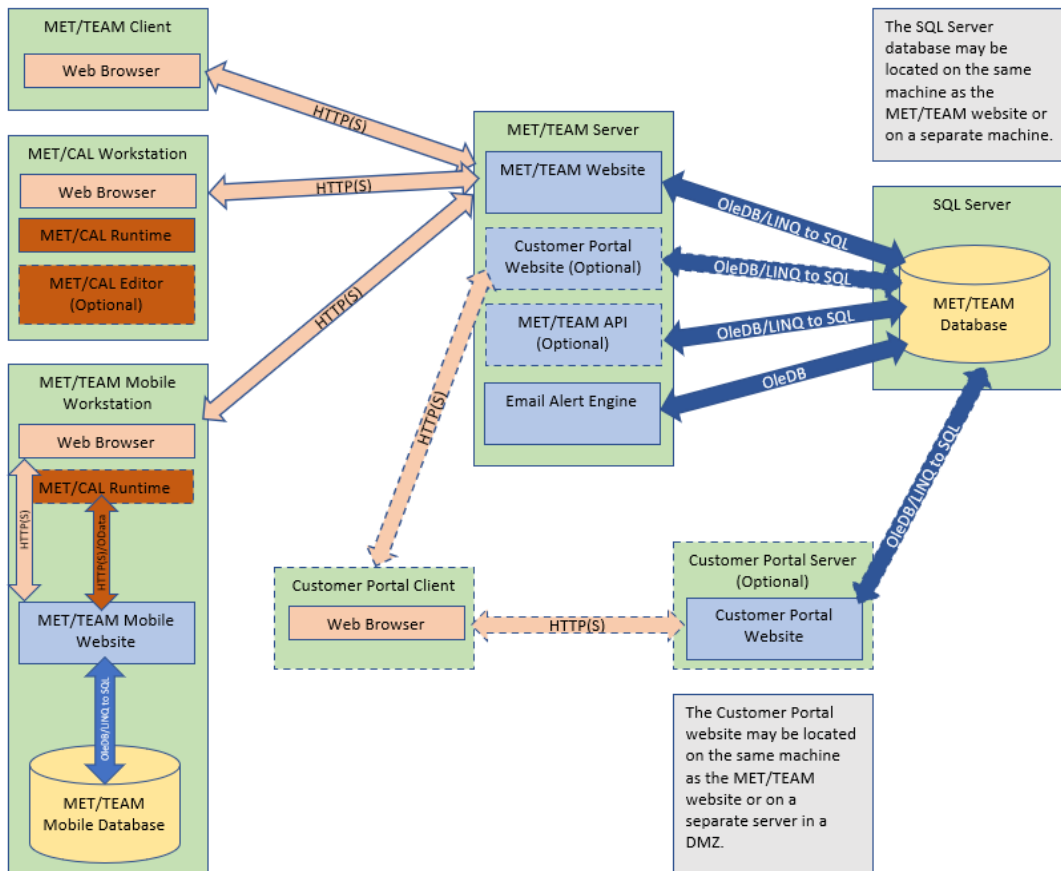
MET/TEAM requires each user to have a password. However, MET/TEAM does not employ password complexity or age policies.

MET/TEAM can be configured to use HTTPS. For more details, refer to the MET/TEAM Installation Guide.

MET/TEAM Architecture

The following diagram shows the software architecture.

MET/TEAM Architecture



Localization

The MET/TEAM Installation and MET/TEAM application support (via string translations and data input) the following languages: English, German, French, Chinese (Simplified), Japanese, Portuguese, Spanish, Russian, and Italian.

When a calibration via MET/CAL is performed from within MET/TEAM, the browser language setting is passed down, so that the MET/TEAM screens presented within MET/CAL use the same setting. The last browser language used in MET/CAL is memorized in MET/CAL's configuration settings, so that when MET/CAL is launched from the desktop, it is applied as well. To manually choose a browser language for running MET/CAL from the desktop, use the Display Language setting on the Runtime Configuration page in the MET/CAL configuration settings.

MET/TEAM supports using other Browser Language Date and Number formats as listed below.

Note: *The official locale files supported via string translations and data input are highlighted in bold red italicized font. These files have been tested.*

Although the non-official locale files have been tested by whoever created them, Fluke has not thoroughly tested all of them. See the column "Tested by Fluke". If you see a problem with one of the non-official language files, please contact softwaresupport@flukecal.com.

Code	Locale	Tested by Fluke
af	African	
am	Amheric (Ethiopia)	
bg	Bulgarian	
ca	Catalan	
cs	Czech	
da	Danish	
de	German	
el_Gr	Greek	
en	English	
en_AU	English (Australia)	
en_CA	English (Canada)	
en_GB	English (United Kingdom)	
en_IE	English (Ireland)	X
en_IN	English (India)	
en_NZ	English (New Zealand)	X
es	Spanish	
fa	Farsi	
fi	Finnish	
fr	French	
fr_CA	French (Canada)	
gr	Greek	
he	Hebrew	
hr	Croatian	
hu	Hungarian	
id	Indonesian	
it	Italian (Standard)	
ja	Japanese	
ko	Korean	
lt	Lithuanian	
lv	Latvian	
mk	FYRO Macedonian	
nl	Dutch	
no_NB	Norwegian, Bokmal (Norway)	
no_NN	Norwegian, Nynorsk (Norway)	
pl	Polish	
pt	Portuguese	
pt_BR	Portuguese (Brazil)	
pt_PT	Portuguese (Portugal)	
ro	Romanian	

ru	Russian	
sk	Slovak	
sl	Singhalese	
sr	Serbian	
sr_RS	Serbian (Serbia)	
sv_SE	Swedish (Sweden)	X
th	Thai	
tr	Turkish	
ukr	Ukrainian	
vn	Vietnamese	
zh_CN	Chinese (Simplified, PRC)	
zh_TW	Chinese (Taiwan)	

Installing MET/TEAM

Refer to the Installation Guide for installation information.

Backing Up a SQL Server® Database

For information on scheduling and automating the backup of your SQL Server® database, refer to the following link.

<http://support.microsoft.com/kb/2019698>

Update Due to Change in Database Schema to GUIDs

The MET/TEAM database schema was changed from using decimal identifiers to a globally unique identifier (GUID) in version 2.2. The new column type is [uniqueidentifier], which can be converted to a 36 character string value. As a result, records referenced by their UID in your data checks will need to be updated.

To assist with this conversion, the converted MET/TEAM 2.2 database contains a set of lookup tables, which are named Guid_<xyz>, where <xyz> is the name of the originating table. For example, to find the GUID for a given decimal reference for nUserID, look it up in the table called Guid_Users.

Data Checks

There may be other changes required to make your data checks work in the new database, but the three most common statements to evaluate are:

1. Checking if a UID value is a new record in Javascript
2. Updating hard-coded UID references in Javascript
3. Declaring a variable used for a UID value in SQL

Checking for new record

Previously, new records contained a NULL value (if nullable), or 0 or -1. So in the code, where a UID value is checked for recordID <= 0, it now needs to check if the field contains the default UID for new records, which is **4CA22A04-0079-4033-84A5-E5968C7F3F17**. In addition, you should also check for the default GUID value, to be safe, which is **00000000-0000-0000-0000-000000000000**.

For example:

```
if ( recordID === null || recordID <= 0 )
```


Changes to:

```
if ( recordID === null || (recordID).toUpperCase() == '4CA22A04-0079-4033-84A5-E5968C7F3F17' || recordID
== '00000000-0000-0000-0000-000000000000' )
```

Checking for specific record

For example:

```
if (Model.nCategoryUID == 1)
```

Changes to:

```
if (Model.nCategoryUID == '03D30256-B643-4735-A42A-E65601DCF9CF')
```

The mappings between the former decimal to new GUID values can be gleaned from the log files generated by the *Database Update Tool* used to convert a MET/TEAM database from 2.1.2 to 2.2.0.

Declaring Local SQL Variable for UID Field

If the data check declares a local SQL variable for a UID field, it must be of type [uniqueidentifier], instead of decimal (18, 0).

For example:

```
DECLARE @UID decimal (18, 0)
```

Changes to:

```
DECLARE @UID [uniqueidentifier]
```

Restoring a MET/TEAM Database

Outline

This section outlines the process of restoring a SQL Server® database backup file for MET/TEAM. This process should be followed for setting up a migrated MET/BASE database for MET/TEAM or when performing disaster recovery following a system failure.

When setting up a migrated MET/BASE database, a link will be provided to download the MET/TEAM database archive file. Download the file and save it to a local directory. Extract the .bak file from the downloaded archive file to a local directory on the machine where SQL Server® is installed before proceeding.

Always ensure the database is compatible with the version of MET/TEAM installed on PC. Otherwise, unexpected behavior may result.

Process

1. Make sure all users are logged out of the MET/TEAM, MET/TEAM Customer Portal, and MET/TEAM Email Alerts web sites.
2. Stop the MET/TEAM web sites.
 - a. Click the Start button and select Control Panel > Administrative Tools > Internet Information Services (IIS) Manager. If Administrative Tools does not appear in the Control Panel window, change the **View by setting** in the upper right corner to Large icons or Small icons.
 - b. Expand the nodes in the Connections pane on the left until you see the METTEAM items under Sites.
 - c. Select the METTEAM item.
 - d. On the far right pane, click the Stop link in the Manage Web Site section.
 - e. Repeat this for the METTEAM Customer Portal and MET/TEAM API sites (if applicable).
 - f. Leave the Internet Information Services (IIS) Manager window open as IIS will be needed later to start the web sites.

3. Open the Services applet in Windows and locate the Fluke Email Alerts Engine service. Right-click it and select Stop from the popup menu.
4. Delete the current MET/TEAM database.

WARNING: Deleting the existing *metteam* database permanently wipes out all data in the database! Do not proceed without first backing up the current database unless the current database does not contain critical data that is not found in the backup being restored!

- a. Launch **SQL Server® Management Studio** and connect to the server.
 - b. In the left pane, expand the **Databases** node.
 - c. Right-click the *metteam* database and select **Delete** from the popup menu.
 - d. On the Delete Object screen, check the Close existing connections checkbox at the bottom of the screen and click OK to delete the database.
5. Restore the backup of the migrated MET/TEAM database.
 - a. In **SQL Server® Management Studio**, right-click the **Databases** node and select **Restore Database**.
 - i. On the Restore Database screen, enter *metteam* in the To database box.
 - ii. Select the **From device** option and click the "... "button.
 1. On the Specify Backup screen, select the File option.
 2. Click the Add button.
 - a. On the Locate Backup File screen, navigate to the directory where the .bak file is located, select the file and click OK.
 3. Click OK on the Specify Backup screen.
 - iii. On the Restore Database screen, check the box in the **Restore** column in the grid and click OK.
6. Close **SQL Server® Management Studio**.
7. Start the MET/TEAM web sites.
 - a. In the **Internet Information Services (IIS) Manager** window, select the *METTEAM* item under the **Sites** node.
 - b. On the far right pane, click the **Start** link in the **Manage Web Site** section.
 - c. Repeat this for the METTEAM Customer Portal and METTEAM API sites (if applicable).
8. Close the **Internet Information Services (IIS) Manager** window
9. Open the Services applet in Windows and locate the Fluke Email Alerts Engine service. Right-click it and select Start from the popup menu.
10. Launch the MET/TEAM web site and log in using one of your user accounts.

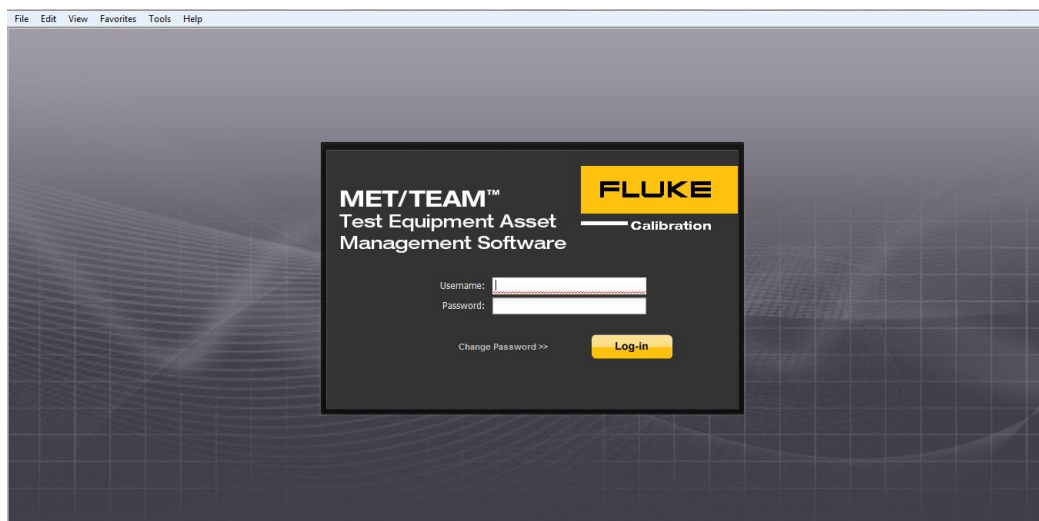
Log-In

MET/TEAM can be [configured to use Windows Authentication](#) or [SAML2 Authentication](#) when logging in. By default, this feature is inactive until a System Administrator activates the System Default *Login – Use Windows Authentication*.

To begin using MET/TEAM, you must know the URL for the MET/TEAM server that you will be connecting to. After you have entered the URL into a Web browser, either the main MET/TEAM screen (Windows/SAML2 Authentication active) or the MET/TEAM Log-In screen (Windows/SAML2 Authentication inactive) is displayed.

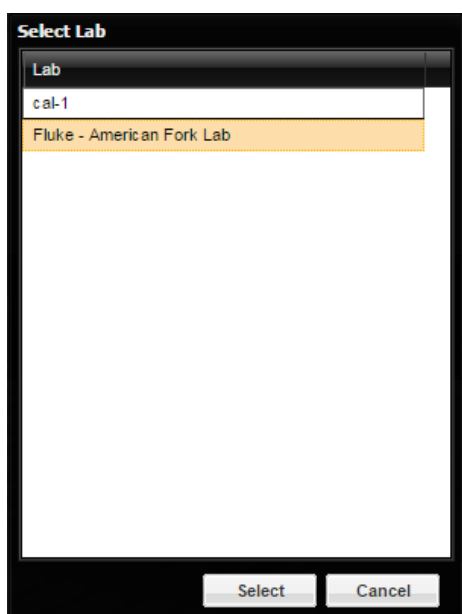
Windows/SAML2 Authentication Not Active

When Windows/SAML2 Authentication is not active, the MET/TEAM Log-In screen is displayed when the MET/TEAM icon is selected from the user's desktop or the URL is entered into a Web browser.



To login, enter your username and then enter your password. These should have been assigned to you by the Administrator of your MET/TEAM site. If you are the Administrator, you begin by entering in the Administrator username and password and then use the Setup menu Users submenu to add users. Refer to the MET/TEAM Installation Guide for the default Administrator username and password.

Select the Log-in button. If you are not assigned to multiple Labs, the main MET/TEAM screen is displayed. If you are assigned to multiple Labs, the Select Lab screen is displayed with your default Lab highlighted.



- Press the Select button to continue to the main MET/TEAM screen logging in to the default Lab.
- Highlight a different Lab and then press the Select button to continue to the main MET/TEAM screen logging into a Lab other than your default Lab.
- Press the Cancel button to return to the Log-In screen.

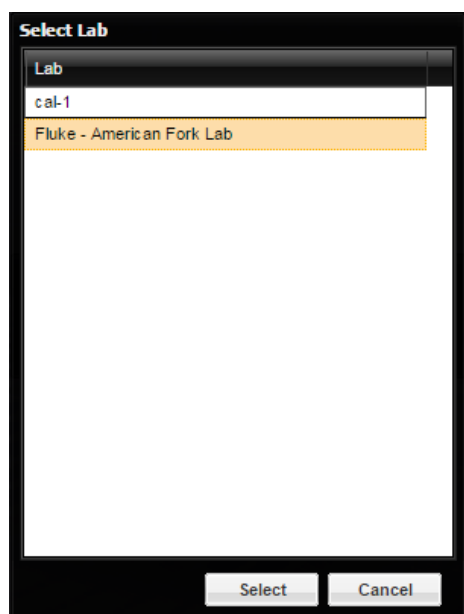
Windows/SAML2 Authentication Active

When Windows/SAML2 Authentication is active, the MET/TEAM Log-In screen is **not** displayed when the MET/TEAM icon is selected from the user's desktop or the URL is entered into a Web browser.

Note: When Windows/SAML2 Authentication is active, MET/TEAM users must be setup with their Windows or Single Sign-On username as the MET/TEAM Username on the MET/TEAM User screen (Setup menu Users submenu).

If you are not assigned to multiple Labs, the main MET/TEAM screen is displayed

If you are assigned to multiple Labs, the Select Lab screen is displayed with your default Lab highlighted.



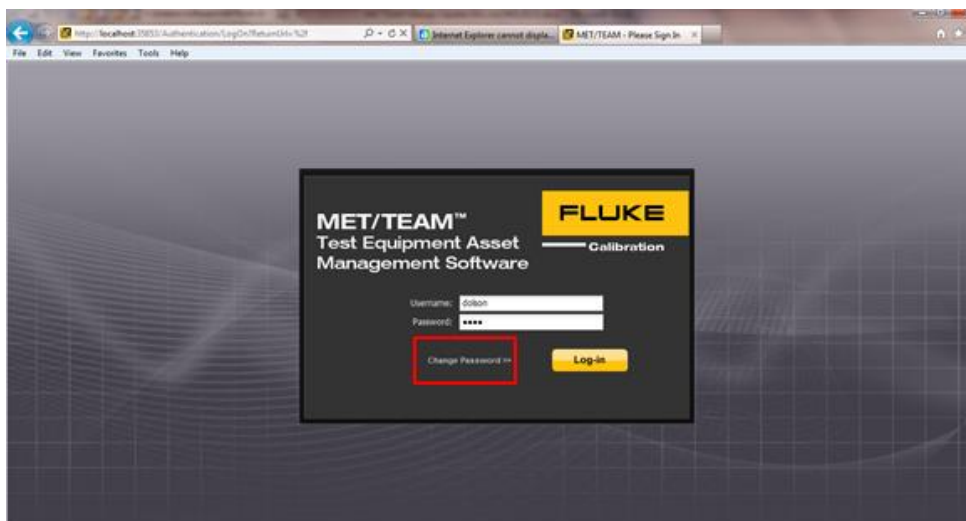
- Press the Select button to continue to the main MET/TEAM screen logging in to the default Lab.
- Highlight a different Lab and then press the Select button to continue to the main MET/TEAM screen logging into a Lab other than your default Lab.
- Press the Cancel button. You are prompted to close the browser. Selecting Yes causes the browser to try and close the browser tab. Based on your browser security settings, this will not always work. In the case that your browser prevents this action, the tab is left in a clean state and may be manually closed. Selecting No, leaves the browser in a clean state ready to be manually closed.

Logging Out when Windows/SAML2 Authentication is Active

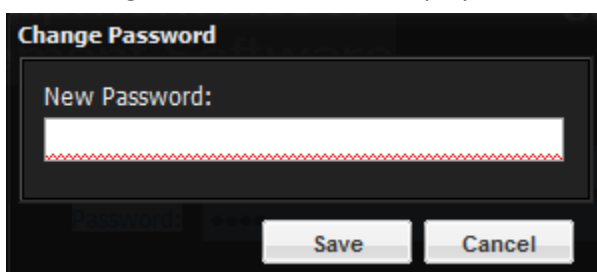
When you log out of MET/TEAM, your user license is released and all resources are cleaned up. You are prompted to close the browser. Selecting Yes causes the browser to try and close the browser tab. Based on your browser security settings, this may not always work. In the case that your browser prevents this action, the tab is left in a clean state and may be manually closed. Selecting No, leaves the browser in a clean state ready to be manually closed.

Change Password from Log-In

To change your password from the Log-In screen, enter your username and your current password. Hover over and select the words "Change Password >>".



The Change Password screen is displayed.



Type in the new password and select Save. A prompt is displayed stating that your password was successfully changed. There are no minimum or maximum length requirements for passwords.

You are returned to the Log-In screen. Type your new password in and select the Log-In button.

Licensing

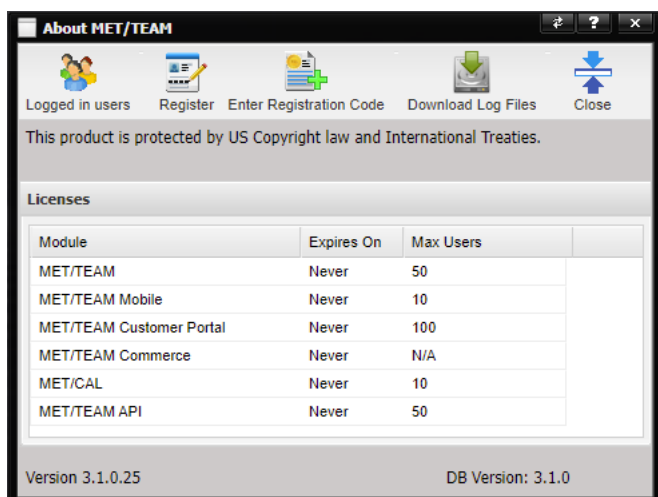
The MET/TEAM application defaults to a Trial license which consists of 3 user licenses for MET/TEAM, MET/TEAM Mobile, MET/TEAM API, and MET/CAL. The MET/TEAM Commerce module is enabled. The Trial license is valid for 60 days.

We may update the licensing information, out of sync with the Help. To view updated licensing information, refer to: <https://my.fluke.com/en-us/article/KA-03379>

To view, request, or apply licenses, use the Help -> About menu option.

About

The About MET/TEAM dialog allows the user to view Logged in Users, process a license registration request, apply a license registration request, or download log files for support.



- **Logged in users** – Displays a list of all users currently logged into applications licensed within MET/TEAM.
- **Register** – Used for entry of registration data and creates the license registration request.
- **Enter Registration Code** – Used to enter the license data returned from the license request via email.
- **Download Log Files** – Used to download a ZIP archive of the MET/TEAM log files from the server or on a MET/TEAM Mobile workstation. When troubleshooting an issue, Technical Support may request that you send a copy of all log files related to MET/TEAM. Use this button to create and download the ZIP archive which can be attached to an email.
- **Close** – Closes the About MET/TEAM window.

Logged in Users

The Logged in Users dialogs displays the users that are currently logged in, the module the user is logged into, the date and time of sign-in, the date and time of last access (when the user last performed an action), the assigned facility, the workstation name (MET/CAL licenses only – always blank for other licenses), and the use count for the license.

User	Module	Log in	Last Access	Assigned Facility	Workstation Name	Use Count
djones	MET/TEAM	08/12/2020 9:51	08/12/2020 9:51	My Lab		1
Admin	MET/TEAM	08/12/2020 9:47	08/12/2020 9:51	My Lab		1
jsmith	MET/CAL	08/12/2020 9:50	08/12/2020 9:51	My Lab	PC-AMF-507CL13	2

A MET/CAL license can be shared between the MET/CAL Runtime application and one or more MET/CAL Editor applications on the same machine as long as the same user logs in to each. The Use Count column indicates the number of MET/CAL applications on the indicated workstation that are logged in under the User's credentials. Logging in on the same workstation using different credentials will allocate a separate MET/CAL license.

The Workstation Name is always blank and the Use Count is always “1” for non-MET/CAL licenses.

A user can be forcibly logged off by an administrator by right-clicking on a row in the grid and selecting Log Off from the popup menu. When a user is forcibly logged off, the license is released. Use this feature with extreme caution as it will prevent the logged off user from saving their work! Forcibly logging off a MET/CAL license will cause all instances of MET/CAL Runtime and/or MET/CAL Editor that were sharing that license to lose their connection to MET/TEAM. However, be aware that the MET/CAL applications will automatically attempt to re-establish the connection when it needs to communicate with MET/TEAM using the credentials that were initially entered, therefore allocating the license to the workstation/user again.

Note: *This process can also be used to release a MET/TEAM Mobile license. Be aware that releasing a MET/TEAM Mobile license in this way prevents the MET/TEAM Mobile instance from being able to perform a Check-In. It is recommended that this feature only be used when absolutely necessary for MET/TEAM Mobile licenses.*

In addition to this information, MET/TEAM logs license usage to the LicenseUsageHistory table in the database, and custom reports may be created to analyze that data if desired. This information may be useful when trying to determine peak license usage on your system to help you know when additional licenses may be needed before users start to experience failed login attempts due to available license shortages.

Register

The Register dialog contains information related to the user that is necessary for submitting a license registration request. The user is prompted for Company Name, Mailing Address, Postal Code, Country, Contact Name, Phone, and Gold Number.

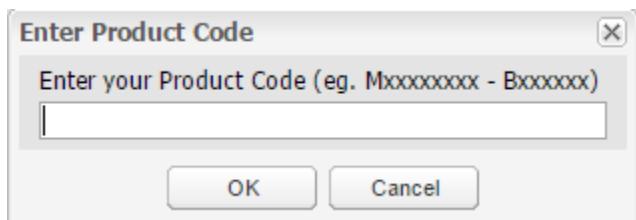
All fields on the Register screen are required except for the Gold Number.

- If your Company is a Gold Member, enter the Gold Number. To ensure the correct number of licenses are generated, make sure to enter a valid Gold membership number. The number is saved and then recalled each time the Register screen is displayed.

- If your Company is not a Gold Member, leave the Gold Number blank to prevent license request from being rejected due to an invalid membership ID.

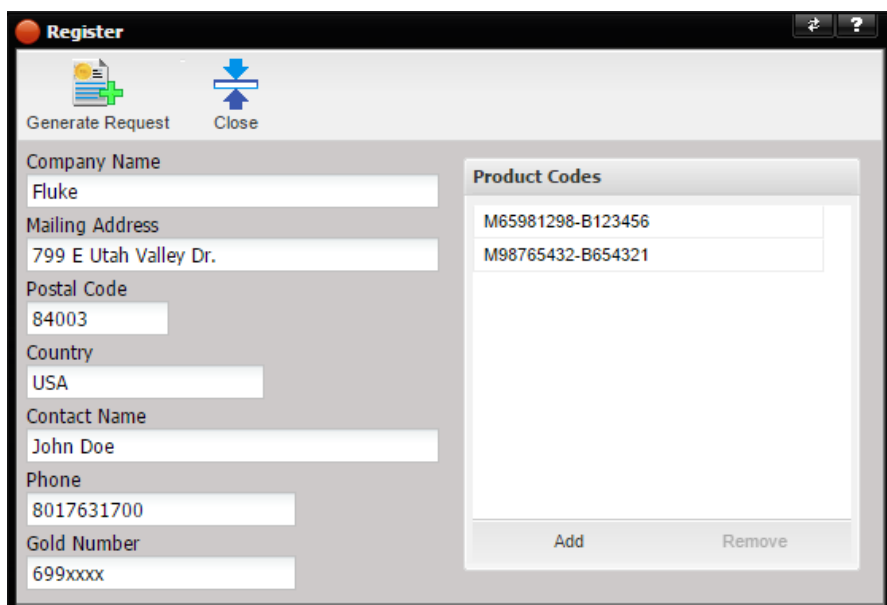
Once the fields are complete, select the Add button to enter one or multiple product codes. Each product code must be entered one at a time.

Note: *Product Codes are shipped to the address on the purchase order at the time of purchase. If you do not have product codes, please contact your purchasing agent.*



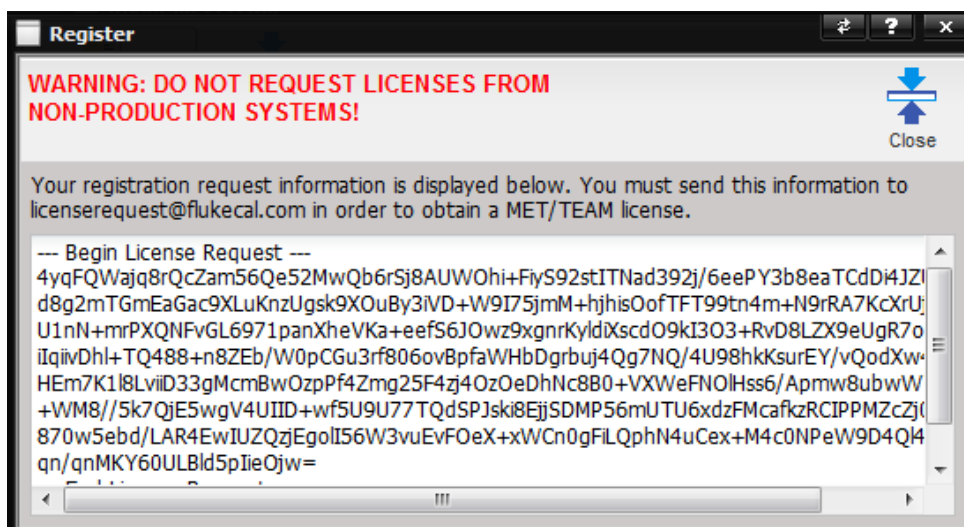
A small dialog box titled "Enter Product Code" with a close button (X) in the top right corner. Inside the dialog, there is a text prompt "Enter your Product Code (eg. Mxxxxxxx - Bxxxxxx)" above a single-line text input field. At the bottom of the dialog are two buttons: "OK" and "Cancel".

For first time registration, the Product Codes list on the Register screen will be blank. The Product Codes are saved once entered and recalled each time the Register screen is displayed. When additional licenses are purchased, add the new Product Code to the end of the list.



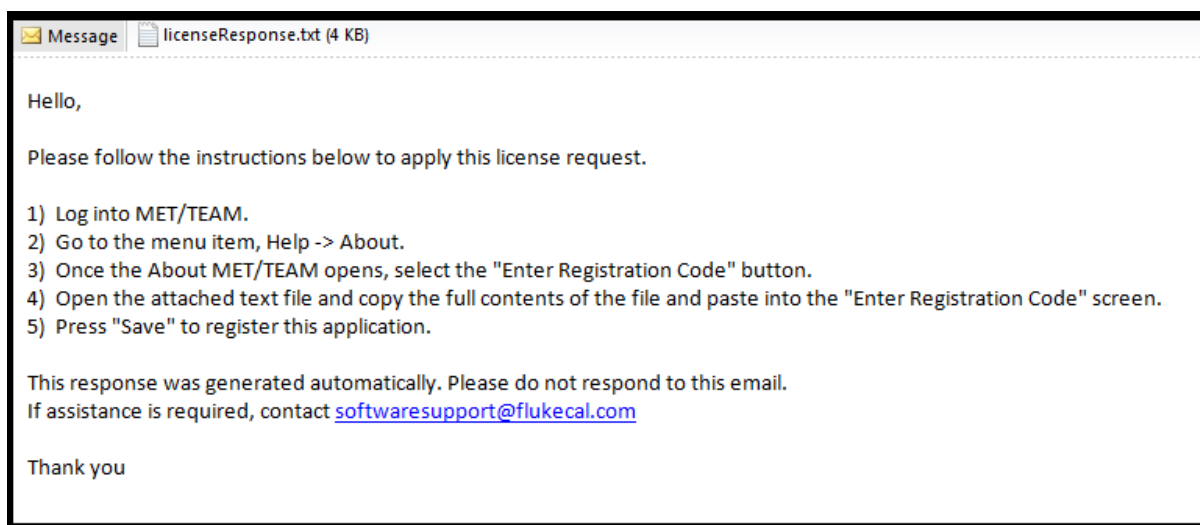
The "Register" screen is a software window with a title bar containing a red circle icon, the word "Register", and standard window controls. Below the title bar are two buttons: "Generate Request" (with a green plus icon) and "Close" (with a blue minus icon). The main area is divided into two sections. On the left, there are form fields for: "Company Name" (Fluke), "Mailing Address" (799 E Utah Valley Dr.), "Postal Code" (84003), "Country" (USA), "Contact Name" (John Doe), "Phone" (8017631700), and "Gold Number" (699xxxx). On the right, there is a "Product Codes" section with a list box containing two entries: "M65981298-B123456" and "M98765432-B654321". Below the list box are "Add" and "Remove" buttons.

When the Generate Request button is selected, the information provided by the user is translated into a License Request. The Register screen is displayed with the license request information displayed.



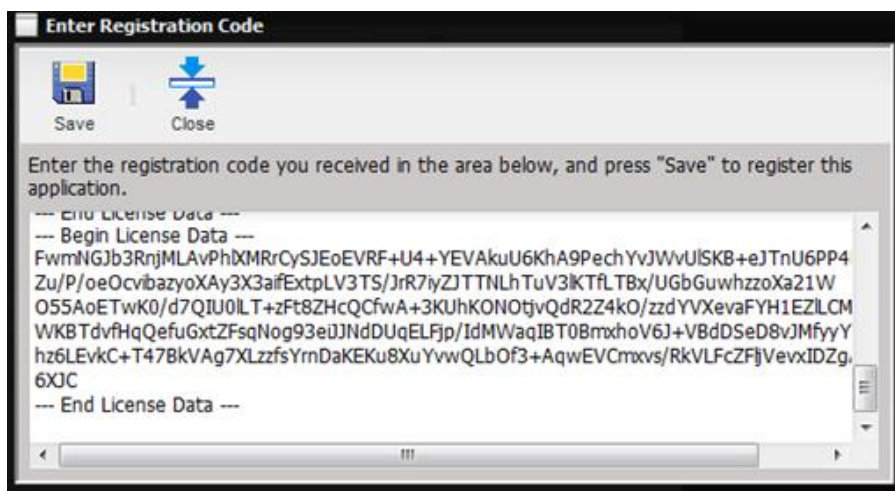
Copy the information exactly as is into the body of an email, including the ---Begin License Request --- and --- End License Request --- tags, addressed to licenserequest@flukeycal.com. Do not add additional information to the license registration request.

Once your license request is processed and assuming the license request information is valid, you will receive an email reply from licenserequest@flukeycal.com containing the license data in an attached text file.

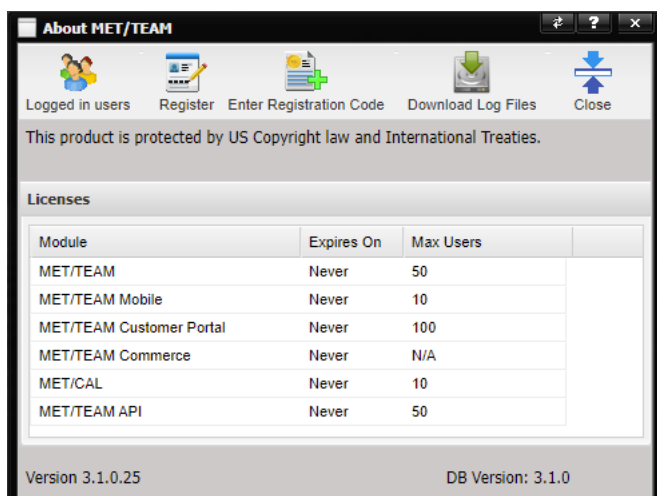


Enter Registration Code

To apply the license data, select the Enter Registration Code button on the About MET/TEAM screen. Paste the entire license response information from the email text file attachment that you received, into the box on the Enter Registration Code dialog and select the Save button. The licenses are applied and the About MET/TEAM dialog is updated.



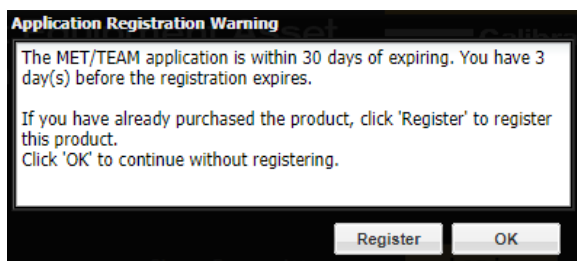
WARNING: Applying licenses immediately forces all users to disconnect from MET/TEAM, including the login being used to apply the licenses! This can potentially cause a loss of data! Before applying licenses to MET/TEAM, make sure all users are notified to save all changes and log off.



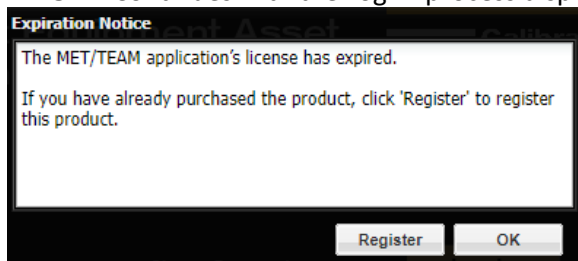
The About MET/TEAM dialog now reflects the licenses that were just applied to the system.

License Expiration

If you are using a TRIAL license, eventually you will receive the Expiration Notice dialog upon log in if MET/TEAM has not been licensed. At this time, MET/TEAM must be purchased to continue to use the application. Thirty days prior to the license Expiration Notice, you will receive the Application Registration Warning.



- **Register** – Displays the Register dialog for entering user information to register the product. This button is not visible if the user does not have the security rights to access the registration screen.
- **OK** – Continues with the Log-In process displaying the MET/TEAM main screen with the menu across the top.



- **OK** – Closes the message and returns to the Login screen.

Open Source Location

The root folder of the distribution media contains a PDF file that indicates copyright information for all of the open source libraries used by the software. In addition, there is a folder on the media called \OpenSource that contains a copy of the license agreements and source code (where applicable) for all of the open source libraries used by the software. Open source license agreements can also be found in the same folders as the binaries after the installation is complete.

MET/TEAM Software Overview

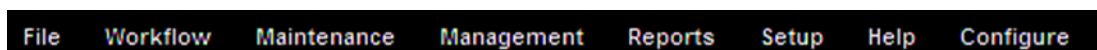
MET/TEAM is a browser-based calibration Asset management software solution. MET/TEAM Email Alerts and the combination of optional modules: MET/TEAM Commerce, MET/TEAM Mobile, MET/TEAM Customer Portal, work with MET/TEAM to form an enterprise data solution from the mobile user to the data warehouse. The MET/TEAM Commerce module provides capability to perform quoting, billing, and invoicing.

The MET/TEAM application blends knowledge, expertise, and technology to provide a solution suitable for large and small business needs. MET/TEAM also interfaces with industry-leading MET/CAL calibration runtime software, providing a complete software solution for calibration and Asset management needs. Processes exist for converting data into MET/TEAM.

MET/TEAM's flexible interface can be modified to use terms and labels that are already common to the user without the expense of customization. In addition, trained power users can use customer terms to define labels, grid contents, and drop down lists. MET/TEAM can track additional data elements, required by the customer, and respond to defined business practices through custom validations.

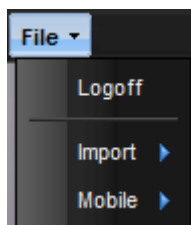
Main Menu

The MET/TEAM menu contains all the options for performing operations within the application. The majority of the menu options open to the Find screen for both searching and selecting a data element or adding data element.

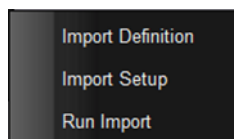


File Menu

The File menu is used for logging off, importing data, and initiating Mobile Check In or Check Out.



- **Logoff** – Allows the user to log off without exiting MET/TEAM.
- **Import** – Allows importing of data into MET/TEAM.

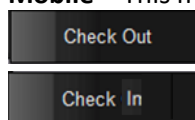


Import Definition – Creates an import definition data file.

Import Setup – Creates a new import setup file.

Run Import – Processes the data to be imported using the import definition file and import setup file.

- **Mobile** – This menu item is only available when valid licenses exist for MET/TEAM Mobile.



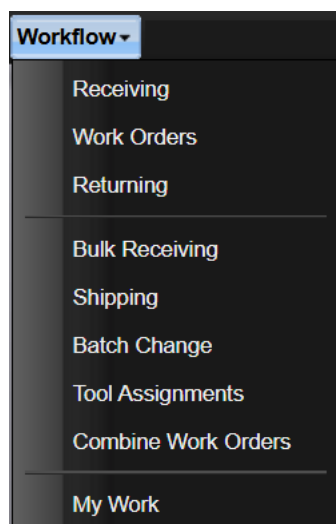
or

Check In – With MET/TEAM Mobile the user can check in data collected or modified while working on site (If not visible, data is currently checked in). This menu option only appears when running a Mobile instance of MET/TEAM.

Check Out – With MET/TEAM Mobile the user can check out data for the maintenance facility and go on site working as a standalone member of the maintenance facility (If not visible, data is currently checked out). This menu option only appears when running a Mobile instance of MET/TEAM.

Workflow Menu

The Workflow menu is used for initiating and processing Work Orders, batch changing Work Orders, tracking locations of Assets that have been loaned to others, and track technician time.

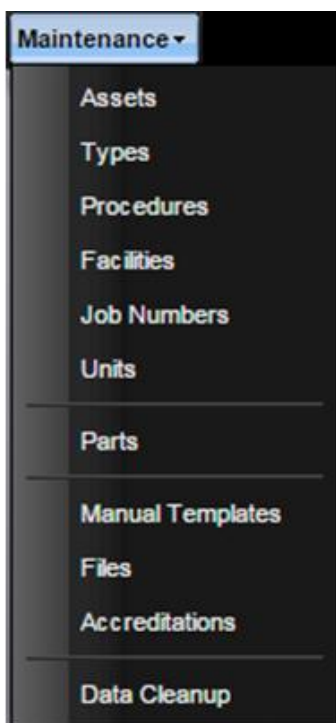


- **Receiving** – Used to receive Assets into the maintenance facility by creating work orders. The receiving process is a batch process allowing for quick and efficient induction of equipment into the maintenance facility.

- **Work Orders** – Used to collect and process maintenance data and actions against open Work Orders.
- **Returning** – Used to close open Work Orders for Assets that have had maintenance completed.
Note: This action will make the Work Order process a history event.
- **Bulk Receiving** – Used to select a set of Assets to receive using a delimited text file.
- **Shipping** – Used to ship Assets and other items to facilities.
- **Batch Change** – Used to change multiple Work Orders at one time. Log notes can be added, Work Orders can be subcontracted or QA approvals can be done.
- **Tool Assignments** – Used to track the process of loaning Assets to contacts. Provides a complete history for both Assets and contacts.
- **Combined Work Orders** – Used to combine Work Orders.
- **My Work** – Used by a technician to add or modify their time and view assigned Work Orders.

Maintenance Menu

The Maintenance menu is for creating, editing, and managing Assets, customers, job numbers, manual templates, files, accreditations, and data cleanup.

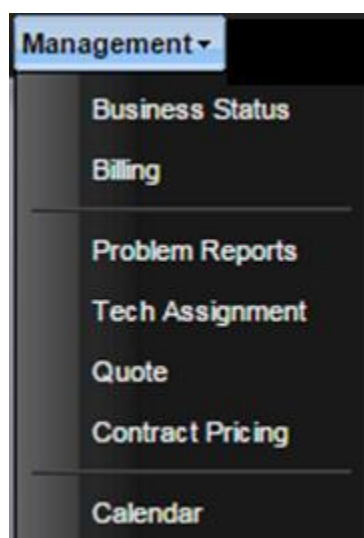


- **Assets** – Used to add, edit, delete and manage Assets. Assets are individual pieces of equipment that are derived from Types.
- **Types** – Used to add, edit, delete and manage types. Types are general characteristics of an object, like catalog items.
- **Procedures** – Used to add, edit, delete and manage procedures. Procedures are the instructions used for performing actions.
- **Facilities** – Used to add, edit, delete and manage facilities. Facilities are any entities such as customers, manufacturers, sub-contractors, and labs.
- **Job Numbers** – Used to add, edit, delete and manage job numbers. Job numbers (P.O. numbers) are funding lines of credit attached to one or more facilities.
- **Units** – Used to add, edit, delete, and manage prefix and base units.

- **Parts** – Used to add, edit, delete and manage parts.
- **Manual Templates** – Used to create and modify templates where manual data point collection will be entered.
- **Files** – Used to add external files to MET/TEAM. These files can be referenced or attached to maintenance events. These files are stored in the database removing any external management.
- **Accreditations** – Allows the user to enter Accreditations or Traceability information referenced by maintenance events.
- **Data Cleanup** – Used to consolidate records that are considered duplicates and to delete record that are marked for deletion but have not been removed from the database.

Management Menu

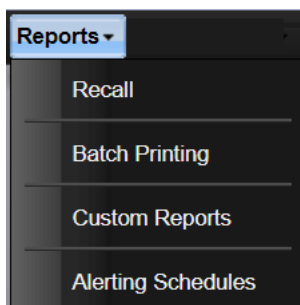
The Management menu is for managing the business and performing financial tasks.



- **Business Status** – Facility managers use this dialog to manage and review many aspects of the Facility and its workload. Use this function to identify opportunities within the Service Facility.
- **Billing** – Used to generate invoices for customers.
Note: Enabled when valid MET/TEAM Commerce module licenses exist.
- **Problem Reports** – Used to document and track issues in the Facility that may be incorrect or need improvement. Typically, a problem is reported by a technician for a procedure or a type and the follow-up is done by a manager or QA person.
- **Tech Assignment** – Used to assign, un-assign, and modify Work Orders to technicians. Combined with standard hours, this interface displays how much work each technician has been assigned ensuring a complete day's work.
- **Quote** –Used to create quotes for customers based on Types.
Note: Enabled when valid MET/TEAM Commerce module licenses exist.
- **Contract Pricing** –Used to manage contract pricing for customers.
Note: Enabled when valid MET/TEAM Commerce module licenses exist.
- **Calendar** – Used by the facility to track facility wide appointments and tasks.

Reports Menu

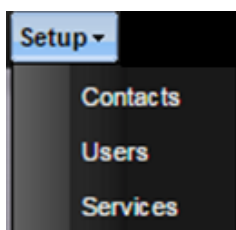
The Reports Menu is for performing recalls, batch certificate printing or exporting, and printing or exporting custom reports.



- **Recall** – Used to review and produce customer recall reports. The recall process allows selecting Assets by date range, customer, department and physical location.
- **Batch Printing** – Generate certificates, work sheet reports or stickers for multiple work orders at once. Output type is PDF or XLS.
- **Custom Reports** – Unlike system reports, these are not tied to a particular screen; parameters are prompted for at run time.
- **Alerting Schedules** – Used to create and manage email alerts sent to Contacts.

Setup Menu

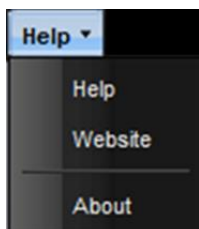
The Setup Menu is for adding and editing users, contacts, and services.



- **Contacts** – Used to add, edit, delete and manage contacts. Contacts are not users of MET/TEAM. Contacts are people needing to be referenced as a customer contact. Contacts are also used for the Tool Assignment screen and MET/TEAM Customer Portal. Contacts are typically related to a facility, but this is not required.
- **Users** – Used to add, edit, delete and manage users.
- **Services** – Used to add, edit, order and delete service types that are performed and tracked in MET/TEAM.

Help Menu

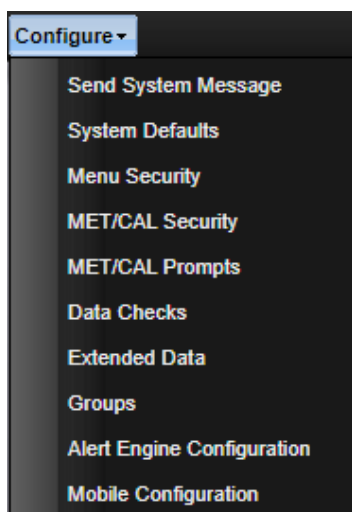
The Help Menu is for searching Help, going to the Website, and processing licenses.



- **Help** – Displays the MET/TEAM Help system. Topics can be searched on or looked up in the Table of Contents.
- **Website** – Links you directly to the website defined in the “HelpWebsite” system default.
- **About** – Displays version information, license information, allows users to update their licensing information, view logged in users, and download a ZIP archive of log files for Technical Support.

Configure Menu

The Configure Menu is only available for users that are in the Administrator or Configure group.



- **Send System Message** – Sends message to every logged in user in MET/TEAM.
- **System Defaults** – Used to add, edit, delete and manage system defaults.
- **Menu Security** – Used to configure security for MET/TEAM menu items.
- **MET/CAL Security** – Used to configure security for MET/CAL SETUP View, RUN View, and CONFIGURE View.
- **MET/CAL Prompts** – Used to design prompts for use with MET/CAL.
- **Data Checks** – Allows expert creation of customized data accuracy checks.
- **Extended Data** – Configure additional data collection points in several areas of MET/TEAM.
- **Groups** – Add, edit, delete, and manage security groups.
- **Alert Engine Configuration** – Used to configure the Alert Engine settings
- **Mobile Configuration** – Used to configure MET/TEAM Mobile settings

Reports

MET/TEAM uses Crystal Reports to design and integrate reporting into the program. Reports can be printed from various screens within MET/TEAM, indicated by the Print button. Crystal Reports Designer can be used to customize reports that ship with the system. The same applies to Customer Portal. Refer to Reports (Customer Portal).

When a report is printed, the report opens in a new browser tab or new window. Depending on which browser you use, the title may be different. In all instances, the browser attempts to assign a title based either on the report name or the MET/TEAM URL that was invoked to generate the report. Which report is used from a particular screen is configurable in system defaults (multiple entries for a System Default Setting indicate multiple reports to be printed):

System Default Setting	Report File	Order
Barcode - Report	barcode.rpt	0
Billing	Invoice_Detail.rpt	0
BusinessProcessed	CompletedWork.rpt	0
BusinessWIP	WIP.rpt	0
Calendar	calendar.rpt	0
Facility - Inventory	Inventory.rpt	0
Manual Template	ManualTemplateFields.rpt	0
Problem Report – Report	ProblemReportNew.rpt	0
Pricing report	Pricing.rpt	0
Quote	quote.rpt	0

Recall	MaintenanceRecall.rpt	0
Recall - Customer Portal	Recall Customer Portal.rpt	0
Recall - No group	RecallNoGroup.rpt	0
Receiving	ReceivedLog.rpt	0
Receiving	Worksheet_UID.rpt	1
Returning	PackingSlip.rpt	0
Returning	Worksheet_UID.rpt	1
Shipping Report	shipping.rpt	0
Technician Work	TechWork.rpt	0
TimeCard	Timekeeping.rpt	0
ToolRoomReport	ToolRoom.rpt	0
Work Order - Forward Trace Report	ttrace.rpt	0
Work Order - Reverse Trace Report	ttrace.rpt	0
Work Order Report	Worksheet_UID.rpt	0

For example, to print a different report from the Print button on the Recall screen, the system default entry for “Recall” must be changed from “maintenancerecall.rpt” to the new report name and the new report must be placed in the reports system directory (see below).

Alternate Reports Included for System Defaults:

System Default Setting	Report File	Description
Recall	MaintenanceRecall.rpt	Recall report grouped by customer with page breaks after each customer.
Recall	MaintenanceRecall_No_PageBreaks.rpt	Recall report grouped by customer without page breaks after each customer.
Recall - No group	RecallNoGroup.rpt	Recall report that is a continuous list sorted by Due Date.
Recall - No group	Recall.rpt	Recall report that is a continuous list sorted by Due Date, with rows separated by lines.
Work Order - Forward Trace Report	ttrace.rpt	Default trace report
Work Order - Forward Trace Report	Trace_v3.rpt	Enhanced trace report
Work Order - Forward Trace Report	ttrace_columns.rpt	Data is formatted in columns and rows for better exporting to spreadsheets
Work Order - Reverse Trace Report	ttrace.rpt	Default trace report
Work Order - Reverse Trace Report	Trace_v3.rpt	Enhanced trace report
Work Order - Reverse Trace Report	ttrace_columns.rpt	Data is formatted in columns and rows for better exporting to spreadsheets

MET/TEAM Reports Directory

Reports printed directly from a screen are referred to as System reports. These are located in the reports system directory set up in system defaults.

Note: These reports should never be moved to the Reporting\Reports directory.

System Default Setting	Reports Path
Reports - Default System directory	C:\inetpub\wwwroot\METTEAM\Reporting\System\

Reports accessible from the *Custom Reports* menu item are located in the reports directory set up in system defaults:

System Default Setting	Reports Path
Reports - Default Reports directory	C:\inetpub\wwwroot\METTEAM\Reporting\Reports\

Customer Portal Reports Directory

Reports printed directly from a screen in Customer Portal are referred to as System reports. These are located in the reports system directory set up in system defaults.

Note: These reports should never be moved to the Reporting\Customer Portal directory.

System Default Setting	Reports Path
Reports - Default System directory	C:\inetpub\wwwroot\CustomerPortal\Reporting\System\

Reports accessible from the Customer Portal *Reports* menu item are located in the reports directory set up in system defaults:

System Default Setting	Reports Path
Reports - Default Reports directory	C:\inetpub\wwwroot\CustomerPortal\Reporting\Customer Portal\

MET/TEAM Facility Addresses and Reports

MET/TEAM allows multiple addresses per facility, on some reports one may be prompted to select an address. The process for determining the appropriate address is as follows:

1. MET/TEAM filters for the desired type of address (Billing, Shipping, or Default).
2. If there is only one record for the type, it is used without prompting.
3. If there is more than 1 address for the type, the Find Facility screen is displayed for selecting the desired address.
4. If there are no addresses for the specific type, MET/TEAM filters for "Default" addresses.
5. If there are no default addresses, the filter is removed and all addresses are evaluated.
6. If there is only one address for the facility, it is used without prompting.
7. If there is more than 1 address, the Find Facility screen is presented, allowing picking from all addresses for the facility.

Report Parameter Combinations

Many of the reports require date parameters. If the report has parameters of data type *datetime*, the following combinations can be used in date fields on Report Parameter screens.

Today and Now and with adding or subtracting an <i>integer</i> (x) and with Days, Weeks, Months, Years	Last, Next, This, First with Month Name (where Month Name is <i>Month, January, February, March, April, May, June, July, August, September, October, November, December</i>) and with adding or subtracting an <i>integer</i> (x) and with Days, Weeks, Months, Years	Last, Next, This, First with Weekday (where Weekday is <i>Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday</i>) and with adding or subtracting an <i>integer</i> (x) and with Days, Weeks, Months, Years
Today + x Days	Last <i>Month Name</i> + x Days	Last <i>Weekday</i> + x Days
Today - x Days	Last <i>Month Name</i> - x Days	Last <i>Weekday</i> - x Days
Today + x Weeks	Last <i>Month Name</i> + x Weeks	Last <i>Weekday</i> + x Weeks
Today - x Weeks	Last <i>Month Name</i> - x Weeks	Last <i>Weekday</i> - x Weeks
Today + x Months	Last <i>Month Name</i> + x Months	Last <i>Weekday</i> + x Months
Today - x Months	Last <i>Month Name</i> - x Months	Last <i>Weekday</i> - x Months
Today + x Years	Last <i>Month Name</i> + x Years	Last <i>Weekday</i> + x Years
Today - x Years	Last <i>Month Name</i> - x Years	Last <i>Weekday</i> - x Years
Now + x Days	Next <i>Month Name</i> + x Days	Next <i>Weekday</i> + x Days
Now - x Days	Next <i>Month Name</i> - x Days	Next <i>Weekday</i> - x Days
Now + x Weeks	Next <i>Month Name</i> + x Weeks	Next <i>Weekday</i> + x Weeks
Now - x Weeks	Next <i>Month Name</i> - x Weeks	Next <i>Weekday</i> - x Weeks
Now + x Months	Next <i>Month Name</i> + x Months	Next <i>Weekday</i> + x Months
Now - x Months	Next <i>Month Name</i> - x Months	Next <i>Weekday</i> - x Months
Now + x Years	Next <i>Month Name</i> + x Years	Next <i>Weekday</i> + x Years
Now - x Years	Next <i>Month Name</i> - x Years	Next <i>Weekday</i> - x Years
	This <i>Month Name</i> + x Days	This <i>Weekday</i> + x Days
	This <i>Month Name</i> - x Days	This <i>Weekday</i> - x Days
	This <i>Month Name</i> + x Weeks	This <i>Weekday</i> + x Weeks
	This <i>Month Name</i> - x Weeks	This <i>Weekday</i> - x Weeks
	This <i>Month Name</i> + x Months	This <i>Weekday</i> + x Months
	This <i>Month Name</i> - x Months	This <i>Weekday</i> - x Months
	This <i>Month Name</i> + x Years	This <i>Weekday</i> + x Years
	This <i>Month Name</i> - x Years	This <i>Weekday</i> - x Years
	First <i>Month Name</i> + x Days	First <i>Weekday</i> + x Days
	First <i>Month Name</i> - x Days	First <i>Weekday</i> - x Days
	First <i>Month Name</i> + x Weeks	First <i>Weekday</i> + x Weeks
	First <i>Month Name</i> - x Weeks	First <i>Weekday</i> - x Weeks
	First <i>Month Name</i> + x Months	First <i>Weekday</i> + x Months
	First <i>Month Name</i> - x Months	First <i>Weekday</i> - x Months
	First <i>Month Name</i> + x Years	First <i>Weekday</i> + x Years
	First <i>Month Name</i> - x Years	First <i>Weekday</i> - x Years

Examples:

Please enter a Start Date:











Please enter an End Date:












Dialog Menu Action Buttons


MET/TEAM allows the user to open more than one part of the application at a time. The user can edit on one screen while leaving another screen open.

All of the MET/TEAM screens contain a menu bar. The menu bar drives the functionality of the screen and supplies security. Menu bar functions from screen to screen remain the same to provide the user with a consistent, easy to understand, interface.

The Dialog Menu buttons are the buttons found at the top of the interface dialogs









	Show Inactive – When pressed, the Find dialog displays both active and inactive records or in the case of Work Orders, shows history (closed) events.
	Find – Initiates the find process. MET/TEAM will take the entered search criteria and use it to find data within the MET/TEAM database.
	Save – Saves changes to data made by the user.
	Add – Adds a record.
	Delete – Deletes the selected record.
	Cancel – Cancels changes made by the user and returns to the previous state.
	Close – Closes the screen.
	Print – Prints the Crystal Report associated with the data.
	Export – Exports the information to a .CSV file. For optimal compatibility, a tab character is used as the delimiter in the .CSV file.
	Barcode – Places the Find screen in “Barcode” mode, prints Barcode in other screens.

	<p>Reset or Reset All –</p> <p>Reset – clears the Search Value(s) associated with the Search Fields.</p> <p>Reset All – prompts the user for action.</p> <ul style="list-style-type: none"> • If “Yes” is selected, the Search Value fields and Starts With, and Exact checkboxes are set back to the original defaults. • If No is selected, the Search Field column is blanked allowing the user to fill in the fields; customize the search criteria. • If “Cancel” is selected, no action is taken.
	<p>Process – Processes the selected items.</p>
	<p>Prints a Certificate – Hold [SHIFT] button to skip previewing and send report directly to printer.</p>
	<p>Unlock – Unlocks a history shipping record.</p>
	<p>Adjust – Recalculates numbers within the billing process.</p>
	<p>Refresh – Redraws the data on the screen using the parameters entered by the user.</p>
	<p>Copy – Copies the currently selected record, speeding up the entry of new data. This button is available on Assets, Types, Procedures, and Manual Templates (Calibrate screen).</p>
	<p>Returning – Displays the Returning dialog from the Work Order screen.</p>
	<p>Bulk Change – Allows updating of multiple fields on multiple Assets.</p>
	<p>Receive – This button is only available on the Asset screen. When selected, the Asset is received and a Work Order is created.</p>
	<p>Transducer – Used on the Manual Template screen, for entering output values.</p>

	<p>Get Ambient – Gets ambient condition data from the MET/CAL RHT.INI file and populates the Temperature and Humidity fields on a Work Order. This button is only enabled when the System Default “Work Orders – Temperature and Humidity Data” is active and the Work Order is not closed.</p>
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Control Buttons

The MET/TEAM control buttons are designed to give the user access to actions and information with a single button click. The control buttons are general within the screen or available on tabs within the screen.

	<p>Add – Allows the user to add data to a grid. Prompts the user with a selection or entry screen for entering data.</p>
	<p>Delete – Allows the user to delete data from a grid.</p>
	<p>Modify – “Quick Link” to the viewed data. This button is available to take the user directly to the selected data instead of having to use the menu and Find process. Assists in improving data entry and accuracy.</p>
	<p>Modify Link – “Quick Link” to view and possibly modify the reference link between data.</p>
	<p>Move Up – Moves the currently selected grid item up one position. The button is disabled if the item selected in the grid is already in the first position.</p>
	<p>Move Down – Moves the currently selected grid item down one position. The button is disabled if the item selected in the grid is already in the last position.</p>
	<p>Lookup (ellipsis) – Allows the user, through the Find screen, to select data elements that exist and are maintained elsewhere in MET/TEAM.</p>
	<p>Section Status - If the Work Order is assigned a procedure that contains Procedure Sections, the details of which portions were executed are displayed by selecting this button.</p>

Window Control Buttons

The MET/TEAM window control buttons appear in the upper right corner of most windows and are designed to give the user control of the window size and position and access other special features with a single button click.

	History Log – Clicking this button displays the History Log dialog which contains a list of changes that have been made to the current record. The Change Tracking System Default setting must be active and enabled to use this feature.
	Refresh – Clicking this button forces the dialog to be reloaded. Any unsaved changes will be lost!
	Help – Clicking this button displays the online help topic for the current dialog.
	Minimize – Clicking this button minimizes the dialog to a button along the bottom of the browser window. Clicking the button for a minimized dialog restores it to its normal state.
	Close – Clicking this button closes the dialog. If the dialog has a Close button on the toolbar, it is recommended to use that instead of clicking this button.

Shortcut Keys

Applies To	Key Sequence	Action
Multi-select Find dialog	CTRL+A	Selects all items in the top window and copies the items to the bottom window focus must be in the 1 st grid of the multi-select
Notes fields	ALT+Q	Opens the Select Note screen for adding, deleting, or modifying Quick Note text
Browser	CTRL++	Resizes the Website size (larger)
Browser	CTRL+-	Decreases the Website size (smaller)
Browser	F11	Toggles between full-screen and other views in the browser

Field Auto Lookups

MET/TEAM includes the ability to perform auto lookups on fields that have the “...” button by typing the beginning letters of the information you wish to use to fill in the field. As you type, matching suggestions are presented below or above the field. Use keyboard up and down arrows to navigate to highlight your selection. Use the Enter key or click the highlighted item to accept your selection and display it in the field. If no selection is made, the field reverts to what was in the field prior to typing.

The following screenshot shows an example. The more that is typed, the finer the selection suggestions. The scroll bar allows for scrolling the selection.

The screenshot shows the 'Asset' screen with fields for Description, Model Number, and Manufacturer. The 'Type' dropdown menu is open, displaying a list of digital test gauges. The first item, 'Digital Te', is highlighted. To the right of the list, there are icons for adding and removing items.

When using the auto lookup on a field that displays a User or a Contact, matches for either the first name or last name are displayed in the list. For example, if you type 'A' in the field, matches are shown where either the first name or the last name start with 'A'.

A few of the auto lookup fields contain additional information in parentheses in the list of matching items in order to better distinguish them. When an item is selected, the information in parentheses is removed.

The following table identifies these special auto lookup fields.

Screen Name	Field	Description
Assets	Description	<p>The Description field in the Type section on the Asset screen displays the Type description followed by the Manufacturer and/or Model Number in parentheses, if available.</p> <p>The screenshot shows the 'Type' dropdown menu with the search term 'D'. The results list includes 'DC REFERENCE STD (FLUKE 732)', 'Default Import Type (Default Import Type)', 'DIGITAL MULTIMETER (FLUKE 10)', 'DIGITAL MULTIMETER (FLUKE 11)', and 'DIGITAL MULTIMETER (FLUKE 87)'. The 'Management' tab is also visible on the right.</p>
Procedures	Data Sheet	<p>The Data Sheet field on the Procedure screen displays the File Name followed by the File Type in parentheses. This field is also limited to displaying only items with File Types of Procedure, Checklist, or Manual Template.</p>

Type Procedure Default	Data Sheet	The Data Sheet field on the Type Procedure Default screen behaves the same as the Data Sheet field on the Procedure screen.

Excluded Lookups Field

Some fields in MET/TEAM do not allow auto lookup due to additional functionality and business rules that occur when information is added to these fields. This additional functionality and business rules takes place when the "..." is used and the Find screen is displayed. Therefore, the following list of fields have been disabled from the Auto Lookup capability.

These excluded fields are designated on the screens with a grayish background color.

Note: The following fields on the specified screens do not allow auto lookup.

Screen Name	Field
Schedule Alert	Alert Parameter Sheet
Receiving	Department Job Number Category and Sub Category
Work Order	Job Number Procedure Used Data Sheet Category and Sub Category

	Job Number (on the Parts tab when using the “+” button, selecting an existing part and the Parts screen is displayed)
Add Labor (when accessed from either Work Order or My Work)	Job Number Category and Sub Category
Assets	Category and Sub Category Department
Edit Asset Service	Service Type
Types	Category and Sub Category
Procedures	Category
Facilities	Category and Sub Category
Parts	Category
Accreditation	Category and Sub Category
Business Status	Department
Billing/Invoicing	Job Number (on the Invoice screen) Job Number (when adding a Part to the invoice using the “+” button, selecting an existing part and the Parts screen is displayed)
Contract Pricing	Type Procedure Default
Problem Report	Work Order (when in Add mode) Procedure Customer (when in Add mode) Type (when in Add mode)
Quote	Work Order Procedure (on Create Quote Item-Type)
Recall	Department
Contact	User

Find Dialogs

For more intense finds and to export to a CSV queried date, use the MET/TEAM dynamic Find dialogs. MET/TEAM has two different Find processes, the single select and multi-select finds. Both of these finds have the same basic features and allow the user to find and select the desired data quickly and easily.

Search Field	Starts With	Exact	Between	Search Value
Barcode	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Customer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Serial Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Model Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Warranty Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Barcode	Customer	Serial Number	Model Number	Warranty Date	Description	Manufacturer
SAMPLE-11	My first customer	1100110001	11		DIGITAL MULTIMETER	FLUKE
SAMPLE-5500	METTRACK IMPORT	4820000	5500A		CALIBRATOR	FLUKE
SAMPLE-5700	METTRACK IMPORT	57000001	5700A		CALIBRATOR	FLUKE
SAMPLE-5725	METTRACK IMPORT	572500001	5725A		BOOST AMPLIFIER	FLUKE
SAMPLE-732	METTRACK IMPORT	732000001	732		DC REFERENCE STD	FLUKE
SAMPLE-742-1	METTRACK IMPORT	742010001	742-1		1 OHM RESISTANCE STD	FLUKE
SAMPLE-742-2	METTRACK IMPORT	742100001	742-10K		10,000 OHM RESISTANCE STD	FLUKE
SAMPLE-87	METTRACK IMPORT	87001001	87		DIGITAL MULTIMETER	FLUKE
SAMPLE-8842	My first customer	884200987	8842		DMM	FLUKE

FIND DIALOG SINGLE-SELECT

Each Find screen Search Criteria and Search Values are configurable by the user. Allowing each user in MET/TEAM to configure the Find dialogs to display only the data they need without affecting others users within MET/TEAM.

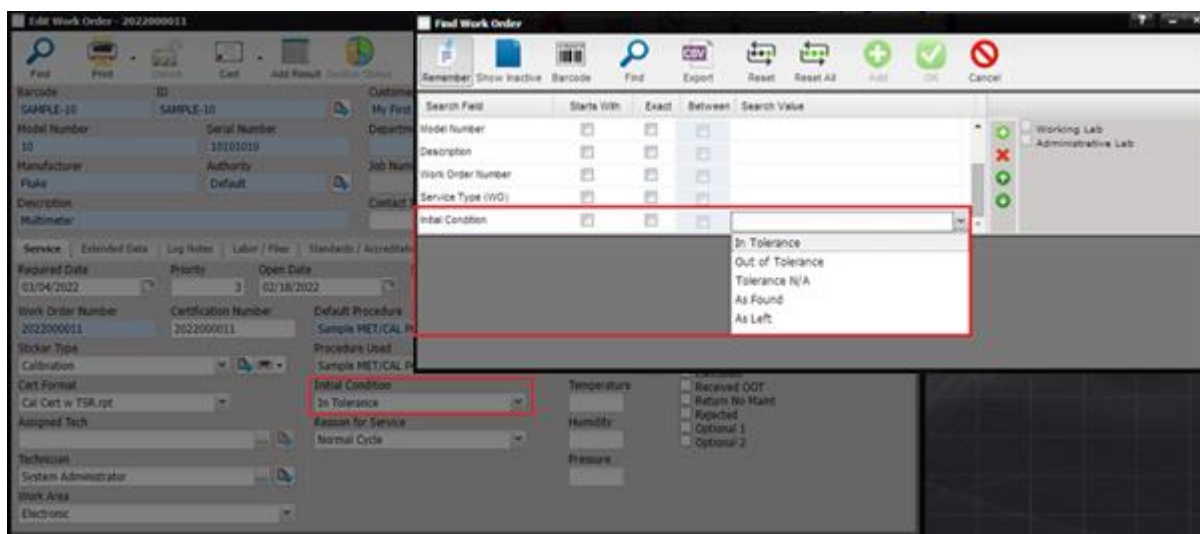
Search Field	Starts With	Exact	Between	Search Value
Barcode	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Serial Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Model Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Manufacturer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Barcode	Serial Number	Model Number	Description	Manufacturer	ID	Customer
SAMPLE-732	732000001	732	DC REFERENCE STD	FLUKE	SAMPLE-732	METTRACK IMPORT
SAMPLE-742-1	742010001	742-1	1 OHM RESISTANCE STD	FLUKE	SAMPLE-742-1	METTRACK IMPORT
SAMPLE-742-2	742100001	742-10K	10,000 OHM RESISTANCE STD	FLUKE	SAMPLE-742-2	METTRACK IMPORT
SAMPLE-87	87001001	87	DIGITAL MULTIMETER	FLUKE	SAMPLE-87	METTRACK IMPORT

FIND DIALOG MULTI-SELECT

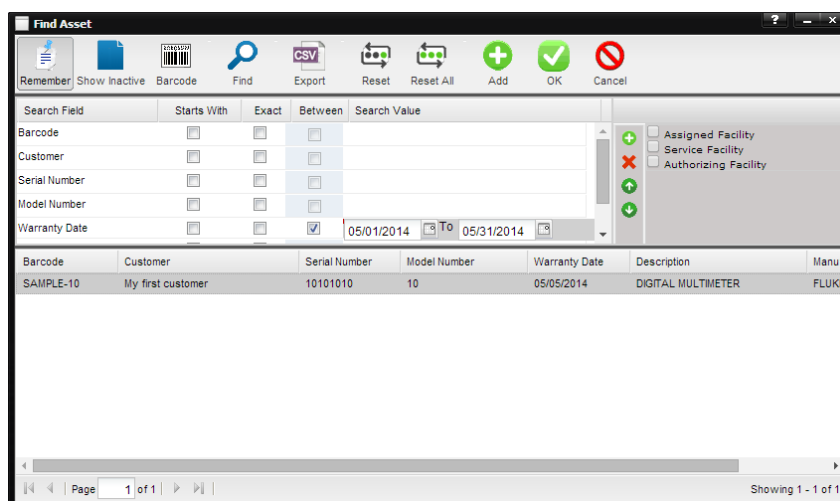
Find criteria are remembered by MET/TEAM when the Remember button is depressed. When the user returns to the Find dialog the last used data is still present expediting user input and making the search for data in MET/TEAM fast and user friendly.

If the Search Field is a dropdown on the associated screen, the Search Value appears as a dropdown on the Find screen. For example, on the Asset screen, the field 'Disposition' is a dropdown. When the cursor is positioned in the Search Value for the Search Field 'Disposition' on the Find Asset screen, the dropdown and values are presented to the user.

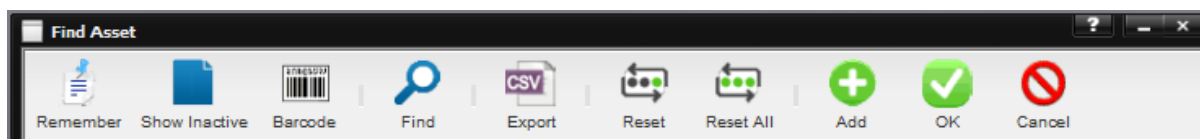


If the Search Field is a date field, the checkbox in the Between column is enabled. When checked, the Search Value appears as a set of date pickers and allows a date range to be selected. Leaving either one of the date pickers blank causes that date to be set to today's date.

Note: Dates selected from the date picker or entered prior to 1970 are not valid.



Find Dialog Toolbar



Remember – When depressed, the user's last search field criteria are remembered and the search fields are configurable.

Note: If the Remember button is not selected, vertical buttons on the right of the Search are not enabled. These buttons are: add, delete, move up, and move down for the Search Fields.

Show Inactive – By default, Find dialogs show only active records within MET/TEAM. If data has been referenced within MET/TEAM but is no longer used, it may be marked as inactive. In order for the user to view or select inactive data, the

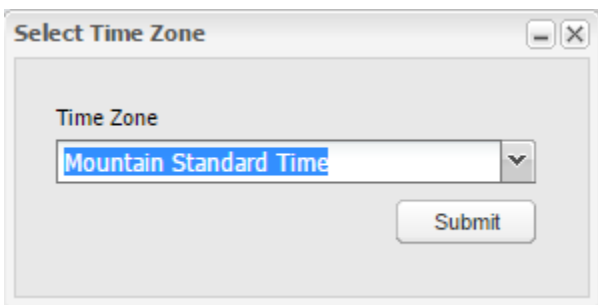
Show Inactive button must be depressed. Once the user has entered the search criteria and selected Find, the results are displayed for both active and inactive records. To hide the inactive records, toggle the Show Inactive button again and select the Find button to refresh the screen. One exception to this rule is in the Work Order screen. By depressing the inactive button, the Find dialog includes closed (history) Work Orders.

Barcode – Selecting this button places the Find dialog in Barcode mode. The user can then use a scanner or other reading device to enter data into the find process. If the Find dialog returns only one record meeting the Search Criteria, the find automatically processes the results and takes the user to the selected data.

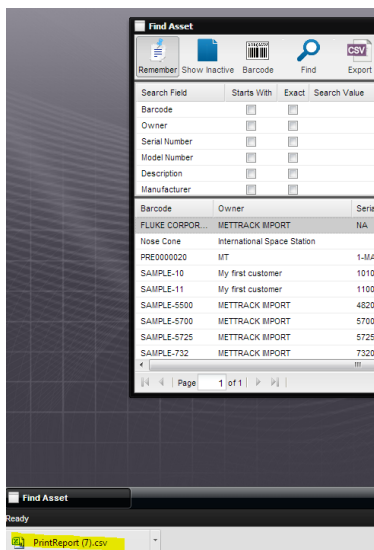
Find – Starts the find process. After the user enters the search criteria, the Find button is selected to start the search (pressing the “Enter” key also starts the search).

Export – Creates a .CSV file containing the search contents and presents it to the user to open. For optimal compatibility, a tab character is used as the delimiter in the .CSV file.

When exporting data to a .CSV file, the Select Time Zone prompt is displayed. The drop-down lists all time zones with the same UTC offset as your current time zone. This is used to facilitate converting any exported dates to local time, including adjusting for Daylight Saving time, as applicable. Select the appropriate time zone to use for the export and click Submit to initiate the export process.



The file download is shown at the bottom of the browser.



Reset – Clears the current search criteria, allowing the user to enter new search criteria.

Reset All – Resets the search criteria and search fields to the default configuration. The user is presented with a prompt.

- If “Yes” is selected, the Search Value fields and Starts With, and Exact checkboxes are set back to the original defaults.
- If No is selected, the Search Field column is blanked allowing the user to fill in the fields; customize the search criteria.
- If “Cancel” is selected, no action is taken.

Add – Opens the corresponding screen for creating a new entity. For example, if the Find Assets screen is open and the Add button is selected, the New Asset screen is displayed for adding a new asset. The Add button is disabled when adding a new entity is not available.

OK – Uses the selected record(s) and processes the data. When in single select mode, this can also be accomplished by double clicking the desired record.

Cancel – Cancels the find process and exits.

Search Conditions

Searches can be performed in many different ways.

Barcode	Customer	Serial Number	Model Number	Warranty Date	Description
SAMPLE-11	My first customer	1100110001	11		DIGITAL MULTIMETER
SAMPLE-5500	METTRACK IMPORT	4820000	5500A		CALIBRATOR
SAMPLE-5700	METTRACK IMPORT	57000001	5700A		CALIBRATOR
SAMPLE-5725	METTRACK IMPORT	572500001	5725A		BOOST AMPLIFIER
SAMPLE-732	METTRACK IMPORT	732000001	732		DC REFERENCE STD
SAMPLE-742-1	METTRACK IMPORT	742010001	742-1		1 OHM RESISTANCE STD
SAMPLE-742-2	METTRACK IMPORT	742100001	742-10K		10,000 OHM RESISTANCE STD
SAMPLE-87	METTRACK IMPORT	87001001	87		DIGITAL MULTIMETER
SAMPLE-8842	My first customer	884200987	8842		DMM

- Searching can use compound search criteria by entering values in more than one of the “Search Value” boxes.
- The use of certain special characters in the “Search Value” boxes is restricted, and replacements are made automatically using the “wildcard” character “%”.
- Search values are additive, meaning that all values entered are used to filter the data being returned in the search.
- Data can be further filtered by check boxes made available to the user. Checking one or more of these boxes adds additional filtering to the data selected. Like the fields available in the find dialog, these check boxes can change or disappear depending upon the context in which the Find dialog is called.
 - Find Asset – filtering by: Assigned Facility, Service Facility, Authorizing Facility – finds Assets associated **only** with the Facility that the user is associated with. For example, if on the Asset screen the Assigned Facility is “Cal Shop” and “Cal Shop” is not listed in the User screen (facility grid at the bottom) for the user that is logged in, this user will not see the Asset on the Find Asset screen if the “Assigned Facility” checkbox is selected.
 - Find Asset – All no filtering (this is the same as when none of the check boxes are selected).

Data Selection Methods

Search values can be found using one of three methods:

1. **Contains** – The default setting for MET/TEAM which returns any data that contains the search value(s) entered. If there is no data that contains the search value, nothing is returned. To use “Contains”, enter the search value, and leave “Starts With” and “Exact” unchecked.
2. **Starts With** – Searches for data that starts with the search value(s) entered. If there is no data that contains the start with value, nothing is returned. To use “Starts With”; check the “Starts With” box on the data element of choice.
3. **Exact** – Searches for data that is an exact match to the search value(s) entered. . If there is no data that exactly matches the value, nothing is returned. To use “Exact” check the “Exact” box on the data element of choice.

Starts With	Exact	Between	Search Value
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	fluke
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

4. **Between** – Searches for dates that fall between the date range selected using the date pickers in the search value field. Leaving any date picker blank causes that date to be set to today’s date. This method is only available for date fields.

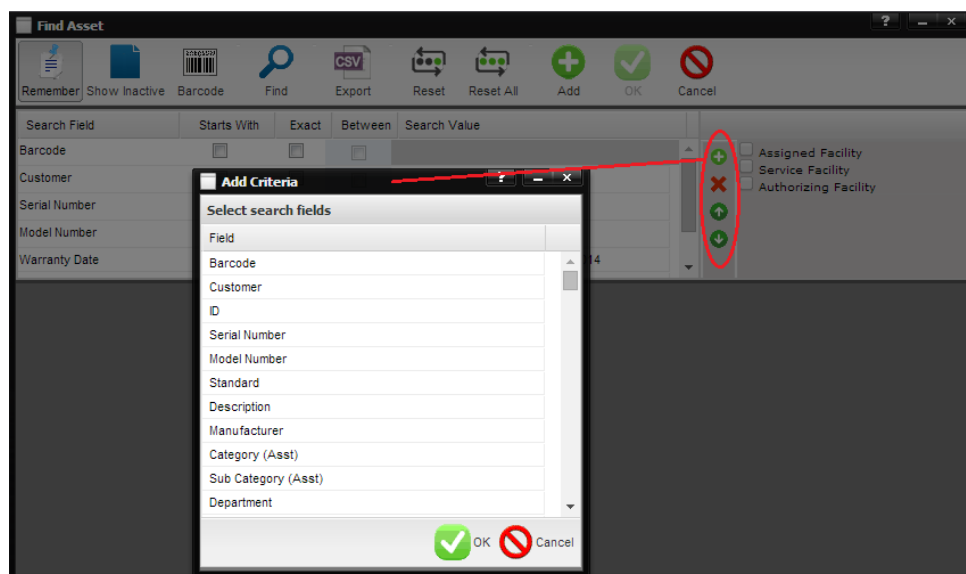
Starts With	Exact	Between	Search Value
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	05/01/2014 To 05/31/2014

Organizing your Search

Find dialogs in MET/TEAM can be modified by the user to fit specific needs.

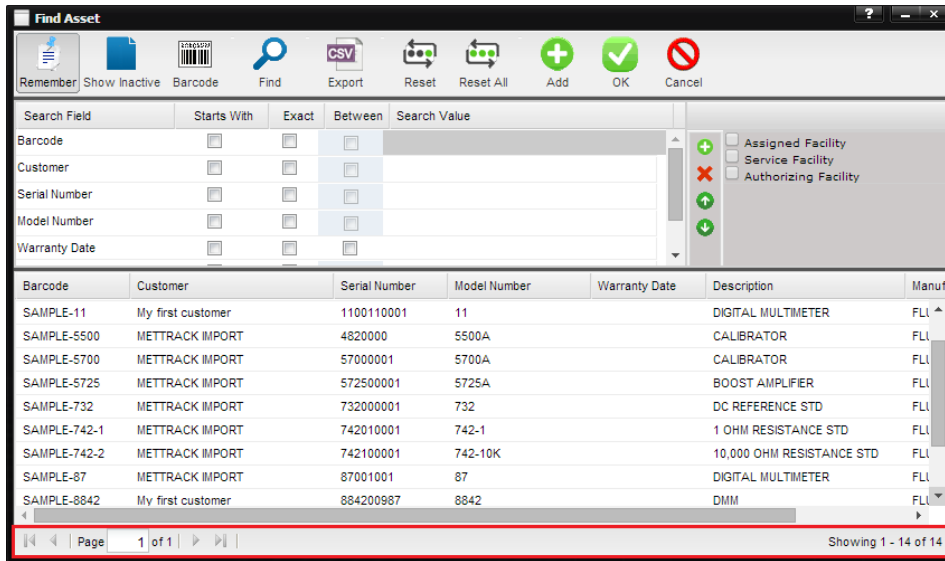
Once the Remember button is pressed, the Search Condition fields can be tailored for each user to contain only the data elements they wish to have returned.

To add fields to the Search Conditions, click the “+” button. An available list of fields is displayed to choose from.



To remove fields from the Search Conditions, highlight the field and click the delete “X” button.

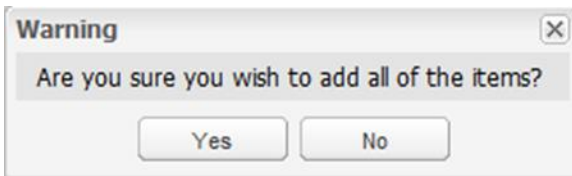
To modify the order of the Search Conditions, highlight a field and click the “↑” or “↓” buttons to move the selections. The order of the search field rows determines the column order in the results grid. Data within the results grid can be resorted by clicking the column header name - first click *ascending*, second click *descending*. If the results grid contains more data than fits on one screen, the status bar on the bottom displays how many items have been returned by your search and controls paging.



Expediting the Select Process in Multi-Select Finds

When using a multi-select Find dialog (two grids on the screen), all items in the top window can be selected and copied to the bottom window:

1. Press [CTRL] +[A] keys
2. Click Yes



Note:

A Find may appear to yield duplicate records. Upon closer examination, however, there should be at least one column that differs, in that case. For example, an asset with multiple recalled services yields one record per each.

Find Asset

Remember Show Inactive Barcode Find Export Reset Reset All Add OK Cancel

Search Field Starts With Exact Between Search Value

Barcode ☐ ☐ ☐ ☐

Customer ☐ ☐ ☐ ☐

Serial Number ☐ ☐ ☐ ☐

Model Number ☐ ☐ ☐ ☐

Description ☐ ☐ ☐ ☐

Assigned Facility ☐

Service Facility ☐

Authorizing Facility ☐

Barcode	Customer	Serial Number	Model Number	Description	Manufacturer
SAMPLE-10	My First Customer	10101010	10	Multimeter	Fluke
SAMPLE-11	My First Customer	1100110001	11	Multimeter	Fluke
SAMPLE-179	My First Customer	324321234	179	True RMS Multimeter	Fluke
SAMPLE-5500	My First Customer	4820000	5500A	Calibrator	Fluke
SAMPLE-5700	My First Customer	57000001	5700A	Multifunction Calibrator	Fluke
SAMPLE-5725	My First Customer	572500001	5725A	Amplifier	Fluke
SAMPLE-732	My First Customer	732000001	732A	DC Reference Standard	Fluke
SAMPLE-742-1	My First Customer	742010001	742A-1	Resistance Standard	Fluke
SAMPLE-742-2	My First Customer	742100001	742A-10K	Resistance Standard	Fluke
SAMPLE-87	My First Customer	87001001	87	True RMS Multimeter	Fluke
SAMPLE-8842	My First Customer	884200987	8842A	Multimeter	Fluke
sample-block	My First Customer	048323242	36	Gage Block Set	Hoke

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After adding *Service Date* to the search criteria:

Find Asset

Remember Show Inactive Barcode Find Export Reset Reset All Add OK Cancel

Search Field Starts With Exact Between Search Value

Barcode ☐ ☐ ☐ ☐

Customer ☐ ☐ ☐ ☐

Serial Number ☐ ☐ ☐ ☐

Model Number ☐ ☐ ☐ ☐

Description ☐ ☐ ☐ ☐

Assigned Facility ☐

Service Facility ☐

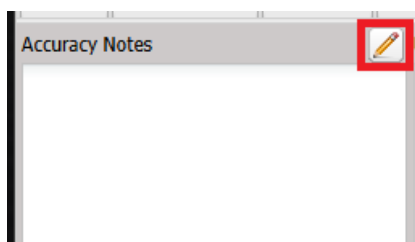
Authorizing Facility ☐

Barcode	Customer	Serial Number	Model Number	Description	Manufacturer	Service Date
SAMPLE-10	My First Customer	10101010	10	Multimeter	Fluke	06/30/2020
SAMPLE-11	My First Customer	1100110001	11	Multimeter	Fluke	05/06/2020
SAMPLE-179	My First Customer	324321234	179	True RMS Multimeter	Fluke	05/31/2020
SAMPLE-179	My First Customer	324321234	179	True RMS Multimeter	Fluke	07/31/2020
SAMPLE-5500	My First Customer	4820000	5500A	Calibrator	Fluke	09/21/2004
SAMPLE-5700	My First Customer	57000001	5700A	Multifunction Calibrator	Fluke	09/15/2004
SAMPLE-5725	My First Customer	572500001	5725A	Amplifier	Fluke	09/10/2004
SAMPLE-732	My First Customer	732000001	732A	DC Reference Standard	Fluke	09/21/2004
SAMPLE-742-1	My First Customer	742010001	742A-1	Resistance Standard	Fluke	09/21/2004
SAMPLE-742-2	My First Customer	742100001	742A-10K	Resistance Standard	Fluke	09/21/2004
SAMPLE-87	My First Customer	87001001	87	True RMS Multimeter	Fluke	09/21/2004
SAMPLE-8842	My First Customer	884200987	8842A	Multimeter	Fluke	09/21/2004
SAMPLE-8842	My First Customer	884200987	8842A	Multimeter	Fluke	07/24/2020
sample-block	My First Customer	048323242	36	Gage Block Set	Hoke	09/21/2004

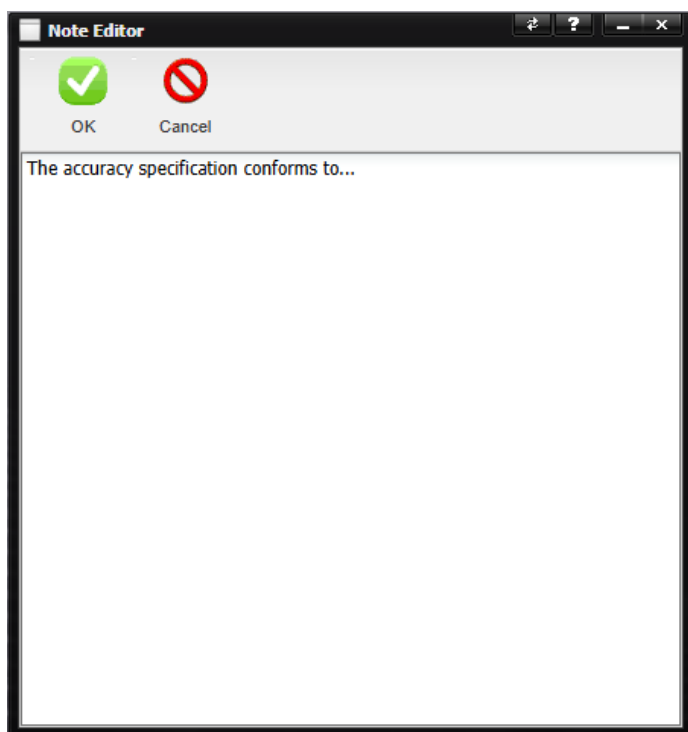
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Note Editor

Many note fields in MET/TEAM can be edited by clicking the edit button to the right of the note field label. This opens the Note Editor page.



The Note Editor page allows for a larger, more convenient text editor to facilitate updating note fields. The Note Editor page is initially displayed with the current text of the note field. Quick Notes can be accessed by either double-clicking the editable area or by pressing the [ALT]+[Q] keys.



The OK button becomes enabled when any change is made to the initial text.

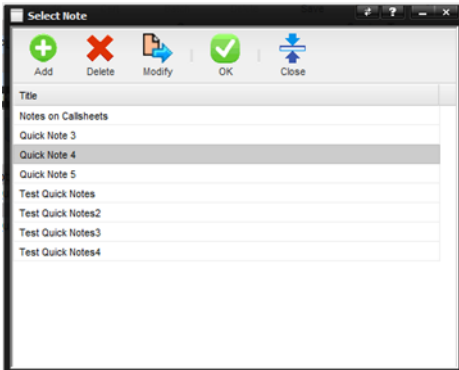
After editing the note text, click the OK button to save the changes and close the page. The updated text will appear in the original note field.

Clicking the Cancel button closes the page, discarding any changes made and does not alter the original note field text.

Quick Notes

In some areas of MET/TEAM, where note fields exist, click in the field and press [ALT]+[Q] keys. This opens the Select Note page which is designed to speed up the data entry process by allowing the user to select predefined blocks of text that are inserted into the Notes field.

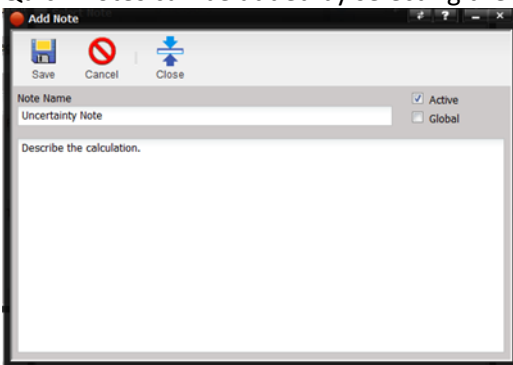
The text blocks within Quick Notes can contain one or many lines of text, supporting tabs, and spaces allow the pre-formatting of text. Quick Notes is a systemic feature, meaning that notes entered can be used by all MET/TEAM users.



The Select Note screen displays the *title* of each defined note. To add one of these to the Note field, double click the title.

Add Quick Notes

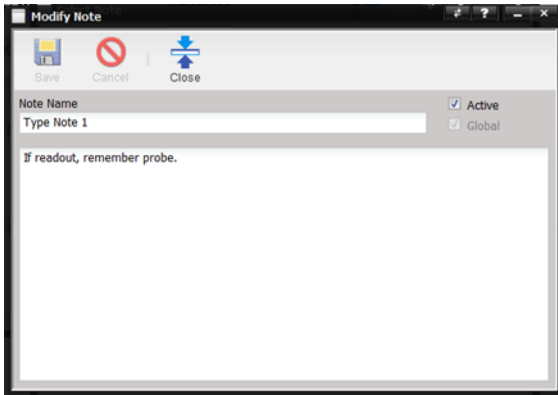
Quick Notes can be added by selecting the Add button. The Add Note dialog is displayed.



- **Note Name** – The title or name of the note.
- **Active** – If checked, the Quick Note is available for use throughout MET/TEAM. If unchecked, the Note is no available.
- **Global** – If checked when **creating** a Quick Note, the user can decide whether or not the Quick Note is accessible to all note controls or only to the note control that was selected when the Quick Note was added. If the “Global” check box is checked, the Quick Note is available for all note boxes. If the checkbox is unchecked, the Quick Note is only available for note area that the user was in when the Quick Note was created. The “Global” checkbox is disabled once the Quick Note is saved.
- **Text Box** – The area where the text that will be displayed for this note is typed.

Modify Quick Notes

To modify, or view a Quick Note, highlight the *title* of the Quick Note and select the Modify button. The Modify Note dialog is displayed.

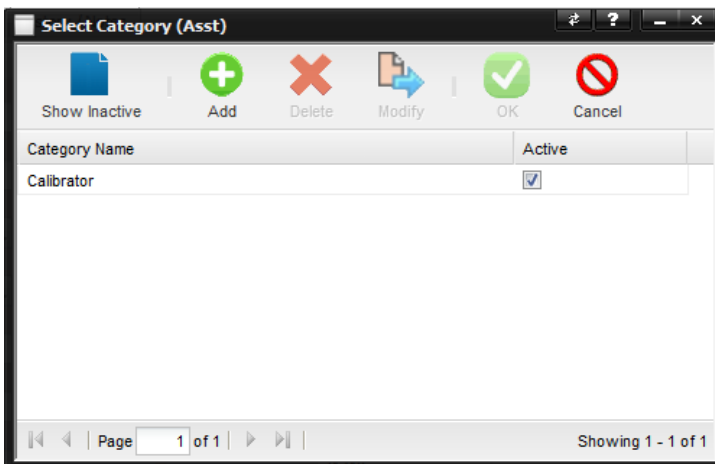


Modify the active status, note name or body of the Note as desired and select the Close button. The Global checkbox is only available when the note is created.

Categories and Sub Categories

Many different sections of MET/TEAM allow the use of *categories* and *sub categories* to classify information for later retrieval or analysis. Each category defined by the user has its own sub categories, giving the user an infinite number of ways to categorize information within MET/TEAM. (A similar screen is displayed for sub categories.) Categories are context-sensitive, meaning categories that are created for Asset characteristics, for example, do not appear in the list when selecting a category for a part, facility, procedure, etc. By the same token, when selecting or creating sub categories, they are always linked to the currently selected category.

The category and sub category is specific to the screen it is called from. The snapshot below is displaying the category for the Asset screen as designated by “(Asst)”.



Show Inactive – By default only active categories and sub categories are shown. Categories and sub categories that are no longer needed or desired can be marked as inactive, making them unavailable to be selected. Categories and sub categories referenced in MET/TEAM cannot be deleted without the reference first being removed.

Add – Adds a new category or sub category. By default, new categories and sub categories are always marked as active.

Delete – Deletes a category or sub category. If a category or sub category is referenced in MET/TEAM, a message is displayed stating that the item cannot be deleted and should be marked inactive instead.

Modify – Allows you to change the name and/or active state of the category or sub category.

OK – Selects the highlighted category or sub category.

Cancel – Cancels the choice and returns the user to previous condition.

A simple example of creating categories and sub categories for Asset characteristics may look something like this:

- Category: Electrical
 - Sub categories: DMM, Oscilloscope, Power Meter, Ammeter, etc.
- Category: Temperature
 - Sub categories: Readout, Bath, Furnace, Dry Block, Fixed-Point Cell, etc.
- Category: Pressure
 - Sub categories: Controller, Piston Gauge, Deadweight Tester, etc.

Read-Only Fields

Fields within MET/TEAM that are read-only are designated by blue fill.

Repurposing Fields

Some fields within MET/TEAM that should not be repurposed while others cannot be repurposed.

The following table lists fields that have right-click capability (customization) but should be repurposed with caution. The fields with a 'No' are used throughout the application.

Screen	Fields	Repurpose
Work Order	On Site	No
	Expedite	No
	Sub Contracted	No
	ISOCert	No
	Cancelled	No
	Received OOT	No
	Return No Maint	No
	Rejected	Yes

The following table lists fields that do not have right-click capability (customization).

Screen	Fields	Customize	Notes
Shipment	Shipped (checkbox)	No	Functionality associated with this field is tied to the Date Shipped. Therefore the field does not have the right-click customization menu.
Work Order - Labor	No Charge (checkbox)	No	Functionality associated with this field is tied to the Cost. Therefore the field does not have the right-click customization menu.
Facility	Customer (checkbox)	No	Functionality associated with this field is tied to No Tax. Therefore the field does not have the right-click customization menu.
Facility	Lab (checkbox)	No	Functionality associated with this field is tied to Inspect All. Therefore the field does not have the right-click customization menu.
Facility	No Tax (checkbox)	No	Functionality associated with this field is tied to Tax Rate. Therefore the field does not have the right-click customization menu.

Date/Time Fields

MET/TEAM writes all date/time information to the database as UTC (Coordinated Universal Time). Other date/time terms used in this document are: Server Time and SQL Server Time which are the same as long as the SQL database is on the same server as the MET/TEAM application or in the same time zone. Local time is the PC local time of the user that is logged in.

Dates on the User Interface

The MET/TEAM User Interface displays time in PC local time unless otherwise stated on the User Interface. The MET/TEAM User Interface states server local time where used.

Using Dates on Find Screens

When entering dates on Find screens, be aware that the date entered is assumed to be at midnight local time. This date/time is then converted to UTC when querying the database. Because all dates in MET/TEAM include a time component, the results to a Find query when using a date field will be specific to the user's time zone. Performing the same query from a different time zone may yield different results.

Dates Using the Import

When an import is performed using the File menu Import Run Import submenu, the time zone specified on the Import Setup is used for the offset to UTC time.

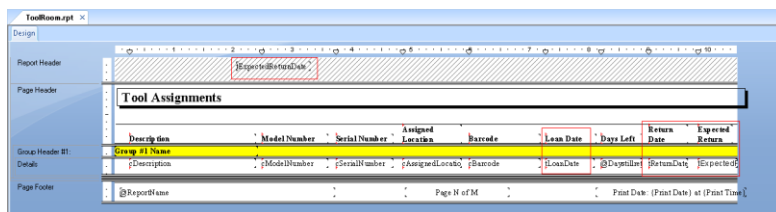
Dates on Reports

All the reports that ship with MET/TEAM include a Crystal Report function around date fields that make the date from the database appear on the reports in the user's local PC time.

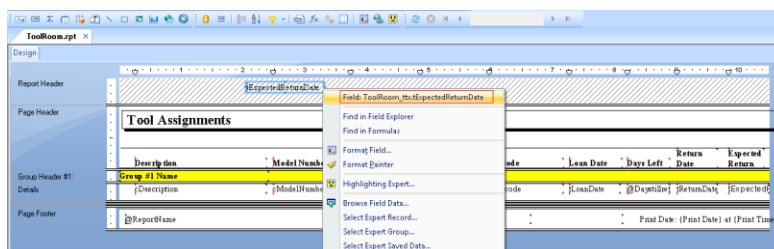
If you are creating your own reports, we recommend that you also use this Crystal Report function. Instructions using this function are detailed below.

Updating Crystal Reports to UTC

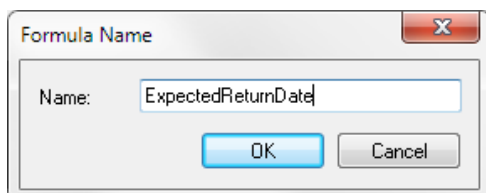
1. Identify the date/time fields on the report.



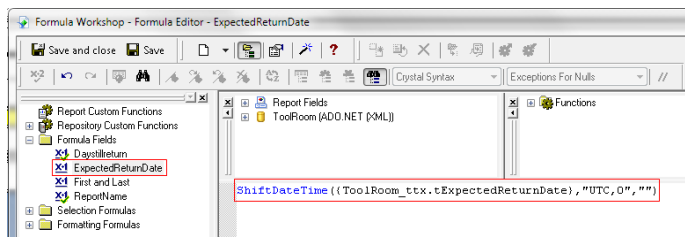
2. Make a formula field for each, using ShiftDateTime() and replace the existing field on the report.
 - a. Locate the date/time field.



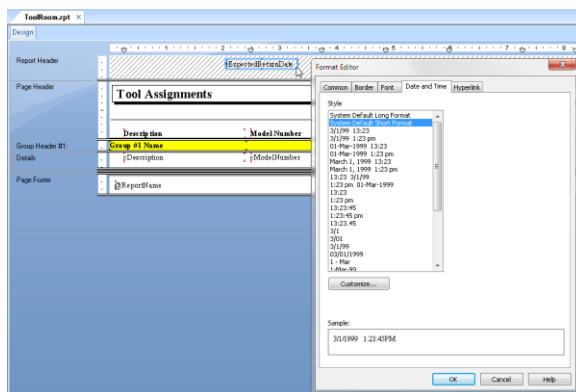
- b. Make a formula field.

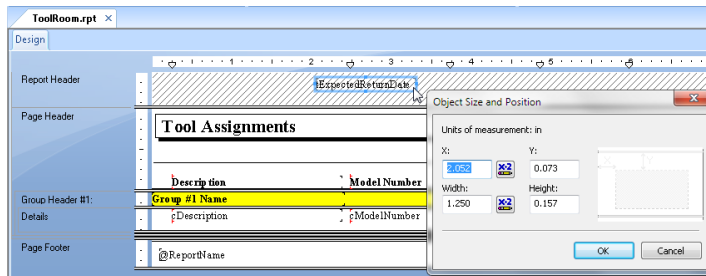
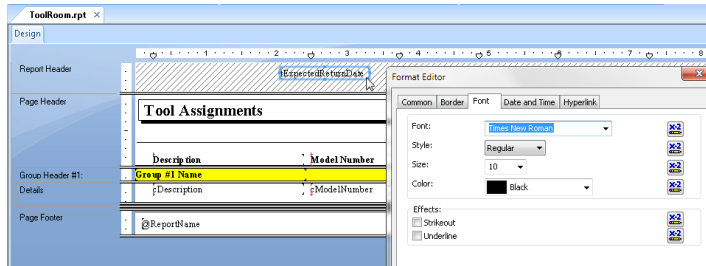


- c. ShiftDateTime(<date field value>, from timezone, to timezone) can be used to adjust date/time from server time (UTC) to PC local time.

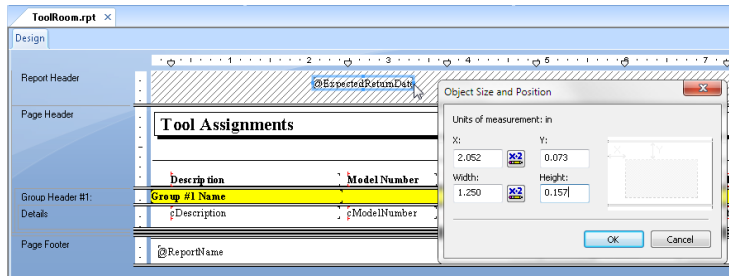
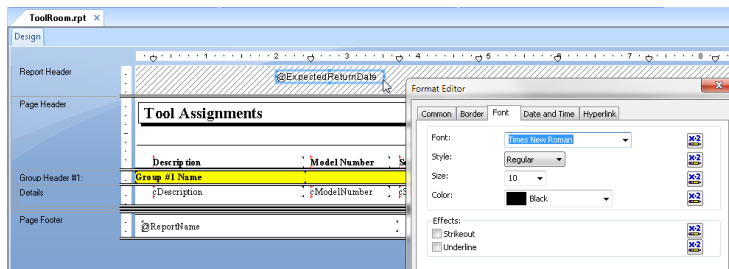


- d. Capture the formatting.





- e. Delete the field.
- f. Insert the formula field.
- g. Restore the formatting.



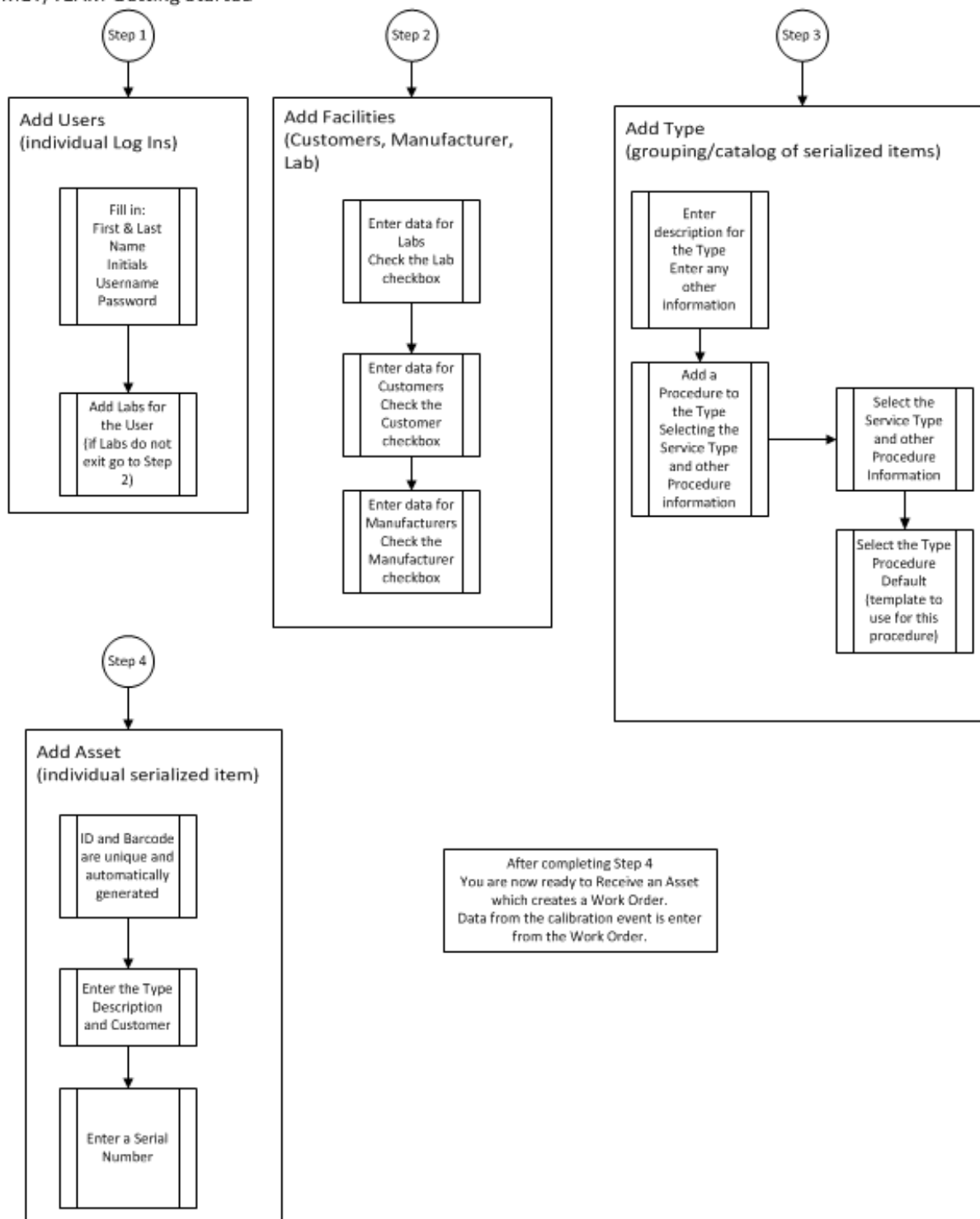
3. Test the report using SSMS, dates on report should reflect PC local time.

How to Get Started Using MET/TEAM

The following flowcharts provides a high level view of how to get started with MET/TEAM. Information in the [Minimum Information Required to Receive and Process Equipment](#) provides the details for each of the steps in this flowchart.



MET/TEAM Getting Started



Follow the steps below to start using and entering data into MET/TEAM. The step order below and content is intended to utilize as much functionality as possible without a data conversion.

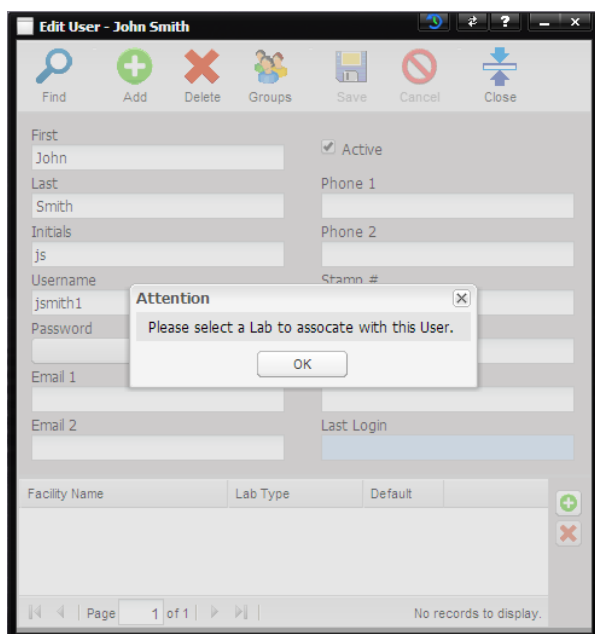
Note: Most screens open to a Find dialog, to add a new record select the Add button.

Minimum Information Required to Receive and Process Equipment

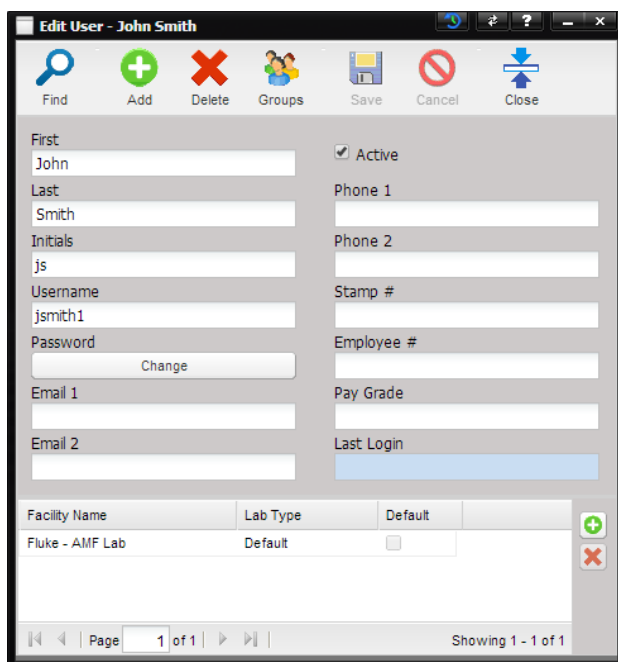
Adding Users (individual log in)

1. Select the Users submenu from the Setup Menu.
2. Select the Add button on the Find User screen to enter the Add User screen in add mode.

3. Enter data for the user. The minimum data required is the user's first name, last name, initials, username, and password as indicated by the red squiggled text boxes. Select the Save button.
4. You are prompted to add a Lab for the user. Each user must be associated with a Lab.



5. When the OK button is selected on the prompt, the Find New Lab screen is displayed, select the Find button. The available Labs are displayed in the Find grid. **Note: a Facility is a Lab if the Lab checkbox on the Facility screen is checked.** If the Lab you are trying to assign to this user to is not displayed, the Lab checkbox on the Facility screen for the lab was not checked. No need to exit this screen just select the Facilities option under the Maintenance menu, find the Facility, check the Lab checkbox, and save the Facility. Return to the Find New Lab screen for the user and select the Find button. The screen is refreshed and the Lab is in the list. Double click the desired Lab and select the OK button. The Find screen is closed and the Lab is displayed at the bottom of the Edit User screen. Additional labs can be added by selecting the "+" to the right of the grid.



6. To add a user to a User Group, select the Groups button at the top of the screen. The Assign Groups dialog is displayed for assigning users to Groups.
7. Select the desired group(s) and select the Save button when done.

Adding Facilities (customer, manufacturer, lab)

1. Select the Facilities submenu from the Maintenance Menu.
2. Select the Add button on the Find Facility screen. The Add Facility screen is displayed.
3. Enter data for the Facility. The Facility Name field and at least one type of Facility (Customer, Manufacturer, Sub Contractor, and/or Lab) are required.
4. Select the Save button.
5. Add an Address for the Facility by selecting the Address tab and then the "+" button on right side. Enter the Facility address information on the screen and save.
6. Add a Contact for the Facility by selecting the Contacts tab and then the "+" button on the right side. Then, find a Contact by selecting the Find button on the Add Contact screen or enter the Contact information on the screen and save.
7. Continue entering Facilities using the steps above. The Add button can also be used on the Facility screen toolbar instead of going back to the main menu.
8. Select the Close button when done.

Adding Types (grouping/catalog of serialized items)

1. Select the Types submenu from the Maintenance Menu.
2. Select the Add button on the Find Type screen to enter the Add Type screen.
3. Enter data for the Type. The minimum data required is the description as indicated by the red squiggled text box.
4. Enter any other data such as Manufacturer, Model Number, Item Cost, etc. as desired.
5. Select the Save button.
6. Add a Procedure for this Type by selecting Procedures tab and then the "+" button on right side.
7. Select a Procedure by pressing the "..." button next to the Procedure Name on the Add Type Procedure Default screen.
8. From the Find Procedure screen select the appropriate Procedure. (If the desired Procedure does not exist, use the steps below to add the Procedure.)
9. Select the Service Type from the dropdown list.
10. Enter the Standard Hours (number of hours it normally takes to perform this service) and the Std. Price (price charged for this service).
11. Enter the interval for the service.
12. Select the "..." button next to the Data Sheet box.
13. From the Find screen that is displayed, select the file that contains the template to use.
14. Select Save on the Type Procedure Default screen.
15. Select Save on the Types screen.
16. Select the Close button when done.

You have now successfully created a user. The Username and Password can be used to log into MET/TEAM. You have successfully created a Facility) and Type which provide a grouping for individual serialized items. Now let's add a Procedure and create the individual serialized items.

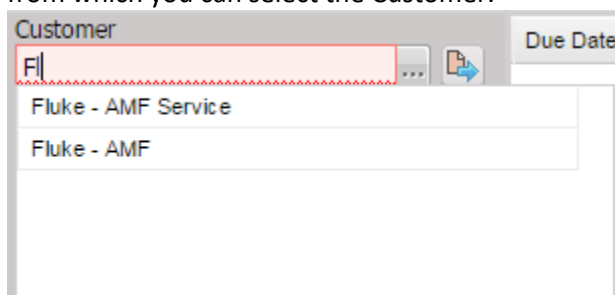
Adding Procedures

1. Select the Procedures submenu from the Maintenance Menu.
2. Select the Add button on the Find Procedure screen. The Add Procedure screen is displayed.
3. The minimum data required is the Procedure Name as indicated by the red squiggled text box.
4. Enter information about the procedure.

5. Select the Save button.
6. Select the Close button when done.

Adding Assets (individual serialized items)

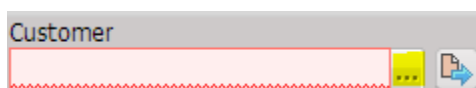
1. Select the Assets submenu from the Maintenance Menu.
2. Select the Add button on the Find Asset screen. The Add Asset screen is displayed.
3. The ID and Barcode are automatically generated.
4. The minimum information required is the Type Description and Customer as indicated by the red squiggled text boxes.
5. Select the Customer either by
 - a. Typing the first characters of the Customer name in the Customer box and a dropdown box appears from which you can select the Customer.



A screenshot of a software interface showing a 'Customer' text box with a red squiggled border. The text 'Fl' is entered in the box. To the right of the text box is a small icon with three dots and a blue arrow. Below the text box, a dropdown menu is open, displaying two options: 'Fluke - AMF Service' and 'Fluke - AMF'. To the right of the dropdown menu is a 'Due Date' label.

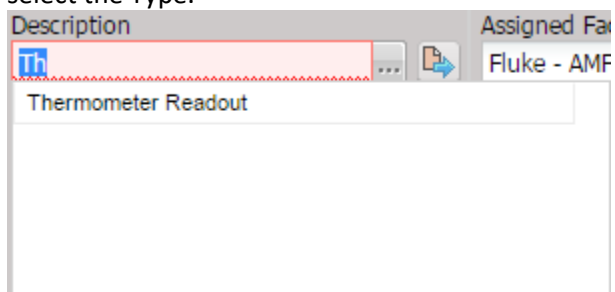
Or

- b. Selecting the "..." button next to the Customer text box. Select the Find button on the Find Facility screen and then select the Facility (Customer) for this asset.



A screenshot of a software interface showing a 'Customer' text box with a red squiggled border. To the right of the text box is a small icon with three dots and a blue arrow.

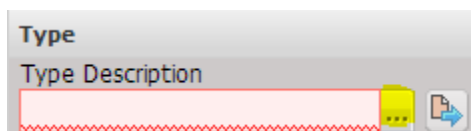
6. Select the Type Description by
 - a. Typing the first characters of the Type in the Type box and a dropdown box appears from which you can select the Type.



A screenshot of a software interface showing a 'Description' text box with a red squiggled border. The text 'Th' is entered in the box. To the right of the text box is a small icon with three dots and a blue arrow. Below the text box, a dropdown menu is open, displaying one option: 'Thermometer Readout'. To the right of the dropdown menu is an 'Assigned Fa' label and the text 'Fluke - AMF'.

Or

- b. Selecting the "..." button next to the Type Description text box. Select the Find button on the Find Type screen and then select the Type for this asset.



A screenshot of a software interface showing a 'Type' text box with a red squiggled border. The text 'Type Description' is entered in the box. To the right of the text box is a small icon with three dots and a blue arrow.

7. Enter in a Serial Number.
8. When asked to "Update all Asset data with current Type data?" select Yes.

- If the Manufacturer is empty, start typing the first characters of the Manufacturer in the Manufacturer box and a dropdown box appears from which you can select the Manufacturer or select the “...” button next to the Manufacturer box and select the appropriate manufacturer.

Note: Other data can be entered, however this is the minimum data that should be entered when creating an Asset.

- Select the Save button.
- Select the Close button when done.

You should now have the minimum information needed to receive and process a piece of equipment.

Please refer to the appropriate sections of the Help for further data explanations and information.

Additional Information – Manual Templates and External Files

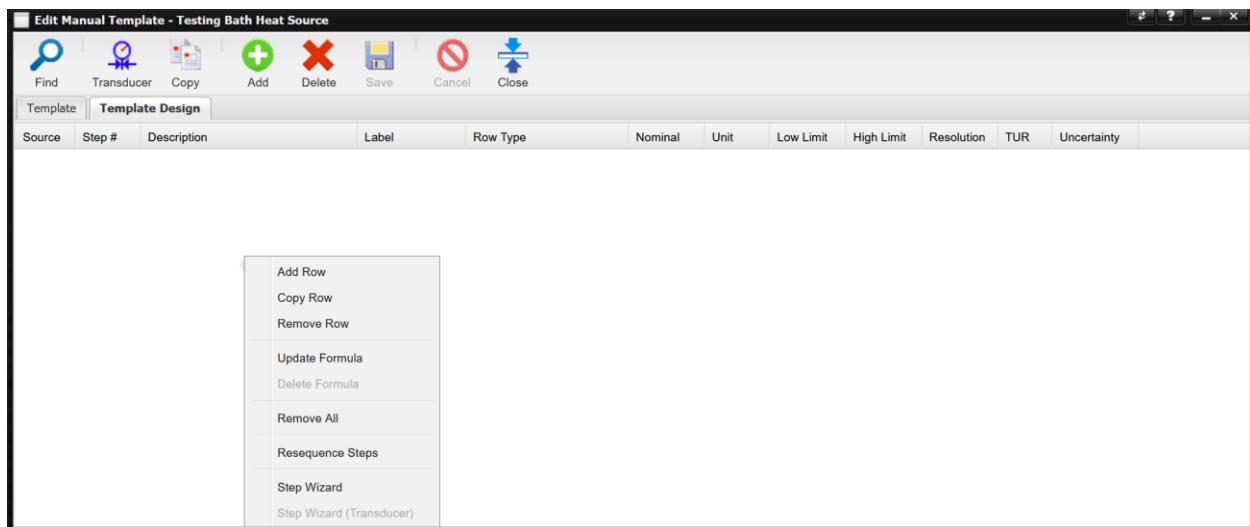
Manual Templates are used to define the necessary pieces of data to be collected during a manual calibration or maintenance process. A simple example would be 1VDC, 10 VDC and 100 VDC.

MET/TEAM also provides the ability to store files from your computer or network directly into the database via the external files functionality. Once these files are stored in MET/TEAM, they become available to all users, including “Mobile” users, without dependency on network mapping or user rights.

Adding Manual Templates

Note: Manual Templates are not required if you are using MET/CAL or Excel™ for your data collection

- Select the Manual Templates submenu from the Maintenance Menu.
- Select the Add button on the Find Manual Template screen to enter the Add Manual Template screen.
- Select the Template tab and enter a Template Name which is required as indicated by the red squiggled text box.
- Select the Template Design tab and begin entering test points by using the menu provided after right clicking in the grid.



- Once the template is complete, select the Save button.
- For more information on Manual Templates, refer to the Manual Template section of this On-Line Help.

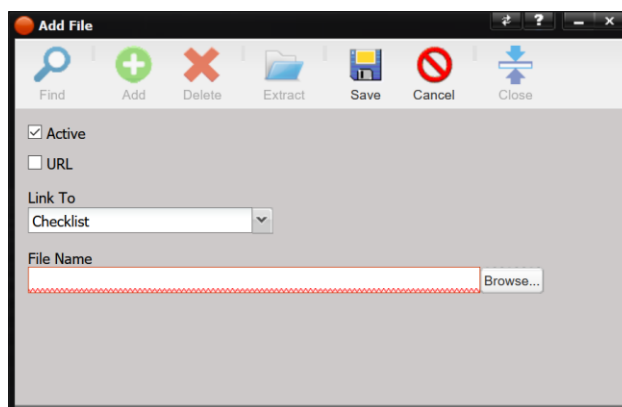
Adding an External File (Spreadsheet) to MET/TEAM

- Select the Files submenu from the Maintenance Menu.
- Select the Add button on the Find File screen to enter the Add File screen.
- In the File Type drop down list select “Checklist”.

4. Select the Browse... button next to the File Name box and select the desired file.
5. Select the Save button.

Note: To add additional files repeat steps 3-6 using the add button at the top of the screen.

6. Select the Close button.



Setting Up a Type to Use the Newly Added Template

1. Select the Types submenu from the Maintenance Menu.
 2. Select the Find button on the Find Type screen to view the list of available Types. Highlight the desired Type and select the OK button (or double click the desired Type).
 3. If there is Procedure listed in the Procedures tab, highlight the Procedure in the list on the Procedure tab. Select the Modify Procedure Link (4th button) on the right side of the Procedures tab. Go to step 9.
 4. Select the "+" on the right side of the Procedures tab. The Edit Type Procedure Default screen is displayed.
 5. Select the "..." button next to the Procedure box.
 6. Select the Find button on the Find Procedure screen to view the list of available Procedures. Highlight the desired Procedure and select the OK button (or double click the desired Procedure).
 7. Enter in the Std. Price for the service.
 8. Enter the interval for the calibration
 9. Select the "..." button next to the Data Sheet box.
 10. Select the Find button on the Attach File find screen to view the list of available Files. Highlight the desired File and select the OK button (or double click the desired File).
- HINT: If you are trying to select a spreadsheet enter XLS in the File Name search field then select the Find button. Only the File Types with an .XLS file extension will be displayed.*
11. Select the Save button on the Edit Type Procedure Default screen
 12. The Procedure has been added to the list in the Procedures tab.
 13. Select the Save button on the Types screen.
 14. Select the Close button.

Note: When an Asset using this type is received and the Data Sheet button is selected on the Work Orders screen, the Manual Template will be used for gathering the data points.

Funding

The processing of work related costs throughout MET/TEAM is calculated when the Work Order is returned. The table below explains the hierarchy used for the calculations, the formulas, and several examples.

Funding Calculation Hierarchy

1. Kind of Job Number
2. Customer Hourly Rate * Work Order Labor (if charged)
3. Service Facility Hourly Rate * Work Order Labor (if charged)

Job Number = Standard Hours Formula	<p>if(JN="Standard Hours", (SP*AQ), 0) + (if(OHR<>0, if(WLHC="Y", OHR*WLH, 0), if(WLHC="Y", SHR*WLH, 0))) + if(ISOB="Y", ISO, 0) + (WOPQ*WOPP)</p> <p>Note: Once labor is added to the Work Order, the cost does not change when the Customer hourly rate or Service Facility hourly rate changes. The labor must be removed if the calculation of the labor cost is incorrect and a new labor entry created. If an expedite fee is charged, it is per asset.</p>
Job Number = Level of Effort Formula	<p>if(JN="Level of Effort", 0, (SP*AQ)) + (if(OHR<>0, if(WLHC="Y", OHR*WLH, 0), if(WLHC="Y", SHR*WLH, 0))) + if(ISOB="Y", ISO, 0) + (WOPQ*WOPP)</p> <p>Note: Once labor is added to the Work Order, the cost does not change when the Customer hourly rate or Service Facility hourly rate changes. The labor must be removed if the calculation of the labor cost is incorrect and a new labor entry created. If an expedite fee is charged, it is per asset.</p>

Funding Attributes	Job Number = Standard Hours. Std. price exists, no associated std. price, hourly rates, or labor.	Job Number = Standard Hours. Std. price exists, no hourly rate or labor. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, no hourly rate or labor. ISO fee exists and used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exists but no labor added to Work Order. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exists but no labor added to Work Order. ISO fee exists and used.
Kind of Job Number (JN)	Standard Hours	Standard Hours	Standard Hours	Standard Hours	Standard Hours
Type Procedure Standard Hours (SH)	5	5	5	5	5
Type Procedure Standard Hours Type	Average	Average	Average	Average	Average
Type Procedure Std. Price (SP)	0	100	100	100	100
Asset Characteristics Quantity (AQ)	1	2	1	1	3
ISO Cert Fee (ISO)	0	225	225	225	225
Customer Hourly Rate (OHR)	0	0	0	50	50
Service Facility Hourly Rate (SHR)	0	0	0	0	0
Work Order ISO Cert Checked (ISOB)	N	N	Y	N	Y
Work Order Labor Hours (WLH)	0	0	0	0	0
Charge Work Order Labor (WLHC)	N/A	N/A	N/A	N/A	N/A
Work Order Parts Qty (WOPQ)	0	0	0	0	0
Work Order Parts Price (WOPP)	0	0	0	0	0
Returning Cost (RC)	\$ -	\$ 200	\$ 325	\$ 100	\$ 525

Comments	Job Number = Standard Hours. Std. price exists, Customer hourly rate exists, labor added to Work Order but not charged. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exist labor added to Work Order but not charged. ISO fee exists and used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exist labor added to Work Order and charged. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exist labor added to Work Order and charged. ISO fee exists and used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate exists, labor added to Work Order and charged. Parts added to Work Order. ISO fee exists not used.
Kind of Job Number (JN)	Standard Hours	Standard Hours	Standard Hours	Standard Hours	Standard Hours
Type Procedure Standard Hours (SH)	5	5	5	5	5
Type Procedure Standard Hours Type	Average	Average	Average	Average	Average
Type Procedure Std. Price (SP)	100	100	100	100	100
Asset Characteristics Quantity (AQ)	1	3	1	2	1
ISO Cert Fee (ISO)	225	225	225	225	225
Customer Hourly Rate (OHR)	50	50	50	50	50
Service Facility Hourly Rate (SHR)	0	0	0	0	0
Work Order ISOCert Checked (ISOB)	N	Y	N	Y	N
Work Order Labor Hours (WLH)	2.5	2.5	2.5	2.5	2.5
Charge Work Order Labor (WLHC)	N	N	Y	Y	Y
Work Order Parts Qty (WOPQ)	0	0	0	0	4
Work Order Parts Price (WOPP)	0	0	0	0	3.25
Returning Cost (RC)	\$ 100	\$ 525	\$ 225	\$ 550	\$ 238

Comments	Job Number = Standard Hours. Std. price exists, Customer hourly rate exist labor added to Work Order and charged. Service Facility hourly rate added but no labor entered at that rate. Parts removed from Work Order. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate removed. Previous labor on Work Order at Customer's previous hourly rate; charged. Service Facility hourly rate added but no labor entered at that rate. ISO fee exists Not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate removed. Previous labor on Work Order removed. Service Facility hourly rate exists but no labor entered at that rate. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate doesn't exist. Service Facility hourly rate exists and labor entered and charged at Service Facility rate. ISO fee exists not used.	Job Number = Standard Hours. Std. price exists, Customer hourly rate doesn't exist. Service Facility hourly rate exists and labor entered and charged at Service Facility rate. Part added to Work Order. ISO fee exists not used.
Kind of Job Number (JN)	Standard Hours	Standard Hours	Standard Hours	Standard Hours	Standard Hours
Type Procedure Standard Hours (SH)	5	5	5	5	5

Type Procedure Standard Hours Type	Average	Average	Average	Average	Average
Type Procedure Std. Price (SP)	100	100	100	100	100
Asset Characteristics Quantity (AQ)	2	1	3	1	1
ISO Cert Fee (ISO)	225	225	225	225	225
Customer Hourly Rate (OHR)	50	0	0	0	0
Service Facility Hourly Rate (SHR)	75	75	75	75	75
Work Order ISO Cert Checked (ISOB)	N	N	N	N	N
Work Order Labor Hours (WLH)	2.5	2.5	0	3	3
Charge Work Order Labor (WLHC)	Y	Y	N/A	Y	Y
Work Order Parts Qty (WOPQ)	0	0	0	0	8
Work Order Parts Price (WOPP)	0	0	0	0	3.25
Returning Cost (RC)	\$ 325	\$ 225	\$ 300	\$ 325	\$ 351

Comments	Job Number = Level of Effort. Standard Hours and Std. Price exists have no effect. ISO fee exists not used.	Job Number = Level of Effort. Standard Hours and Std. Price exists have no effect. Customer hourly rate exists, labor is added to the Work Order and charged. Service Facility hourly rate added but no labor entered at that rate. ISO fee exists not used.	Job Number = Level of Effort. Standard Hours and Std. Price exists have no effect. Customer hourly rate does not exist. Service Facility hourly rate exists and labor entered on Work Order at that rate. ISO fee exists not used.	Job Number = Level of Effort. Standard Hours and Std. Price exists have no effect. Customer hourly rate exists. Service Facility hourly rate exists. Labor entered on Work Order uses Customer hourly rate. Parts added to Work Order and charged. ISO fee exists not used.	Job Number = Level of Effort. Standard Hours and Std. Price exists have no effect. Customer hourly rate exists. Service Facility hourly rate exists. Labor entered on Work Order uses Customer hourly rate. Parts added to Work Order and charged. ISO fee exists and used.
Kind of Job Number (JN)	Level of Effort	Level of Effort	Level of Effort	Level of Effort	Level of Effort
Type Procedure Standard Hours (SH)	5	6	5	5	5
Type Procedure Standard Hours Type	Average	Average	Average	Average	Average
Type Procedure Std. Price (SP)	100	100	100	100	100
Asset Characteristics Quantity (AQ)	2	1	3	1	1
ISO Cert Fee (ISO)	225	225	225	225	225
Customer Hourly Rate (OHR)	0	50	0	50	50
Service Facility Hourly Rate (SHR)	0	75	75	75	75
Work Order ISO Cert Checked (ISOB)	N	N	N	N	Y

Work Order Labor Hours (WLH)	0	1	1	1	1
Charge Work Order Labor (WLHC)	N/A	Y	Y	Y	Y
Work Order Parts Qty (WOPQ)	0	0	0	8	8
Work Order Parts Price (WOPP)	0	0	0	3.25	3.25
Returning Cost (RC)	\$ -	\$ 50	\$ 75	\$ 76	\$ 301

Job Number – Standard Hours

The following provides an example of how costs are calculated using the Standard Hours algorithm.

1. Create a Facility and assign an hourly rate. In this example the Facility Name is “Cal Lab Inc” and the hourly rate is \$50.

2. The Facility owns two Assets with IDs of 5500A-101 and 5500A-202.

The Procedure associated with the Asset type (5500A) is called “FundingExample” and is displayed on the Type screen.

The “FundingExample” procedure states 5 standard hours, a standard price of \$125, and ISO cert Fee of \$75.

3. Create a Job Number for the Facility “Cal Lab Inc”. Specify that the costing will be based on “Standard Hours” by selecting the Standard Hours option and with an amount of \$10,000.

4. Receive Asset 5500A-101 into the Servicing Lab by selecting the Receiving menu option and then Processing the Asset. Notice the Job Number is brought into the Receiving screen.

The screenshot shows the 'Receiving Assets' window. On the left, there's a table of 'Received Assets' with columns: Barcode, Customer, Description. The first row shows '5500A-101', 'Cal Lab Inc', and 'Calibrator'. Below this is an 'Asset Details' section with fields for Key, Value, Description, Customer, Manufacturer, Disposition, and Area. On the right, there's a 'Receiving Details' section with various dropdowns and checkboxes. The 'Job Number' field is highlighted with a yellow circle and contains the value '2021-001CL'.

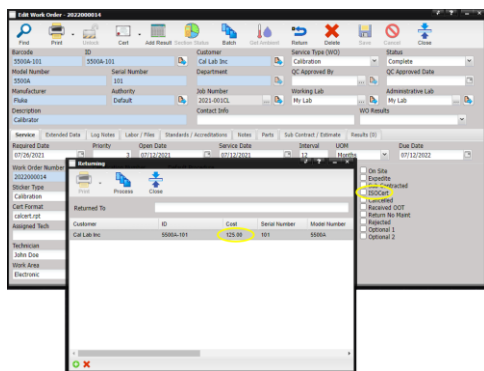
5. Open the Work Order that was created during the receiving process. In this example, the Work Order number is "2021000014". Enter a Service Date, Due Date, and Procedure Used ("FundingExample"). Select the Save button.

The screenshot shows the 'Edit Work Order - 2021000014' window. It has a top toolbar with icons for Find, Print, Undo, Cut, Add Result, Section Select, Batch, Get Amount, Delete, Save, and Close. Below the toolbar is a form with various fields. The 'Procedure Used' field is set to 'FundingExample'. Other fields include 'Work Order Number', 'Certification Number', 'Default Procedure', 'Initial Condition', 'Reason for Service', 'Normal Cycle', 'Temperature', 'Humidity', 'Pressure', 'On Site', 'Exposures', 'Sub Contracted', 'ISO Cert', 'Received OOT', 'Return No Mgmt', 'Rejected', 'Optional 1', and 'Optional 2'.

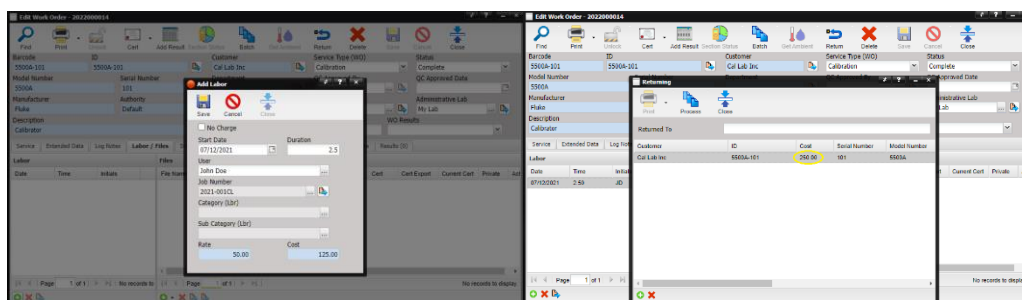
6. A Work Order can only be returned if the Status is "Complete". Create a Log Note, select "Complete" as the Status, and save the Work Order. Now select the Return button.
 - The Return screen displays a cost of \$200 which is derived from the Std. Price and in this case the ISO Cert Fee from the FundingExample procedure.
 - Calculation = \$125 (Std. Price) + \$75 (ISO Cert Fee) refer to step #2.

The screenshot shows the 'Edit Work Order - 2021000014' window. The 'Return' button is highlighted. A small window titled 'Returned To' is open, showing a table with columns: Customer, ID, Cost, Serial Number, Model Number. The first row shows 'Cal Lab Inc', '5500A-101', '\$200.00', '101', and '5500A'.

- Uncheck the ISO Cert check box on the Work Order and the Returning cost = \$125 (Std. Price).
 - Calculation = \$125 (Std. Price)



- With the ISO Cert check box unchecked, add 2.5 hours of Labor to the Work Order by going to the Labor/Files tab and selecting the green “+” button on the left side at the bottom of the screen. Select the Return button and the Returning cost = \$250.



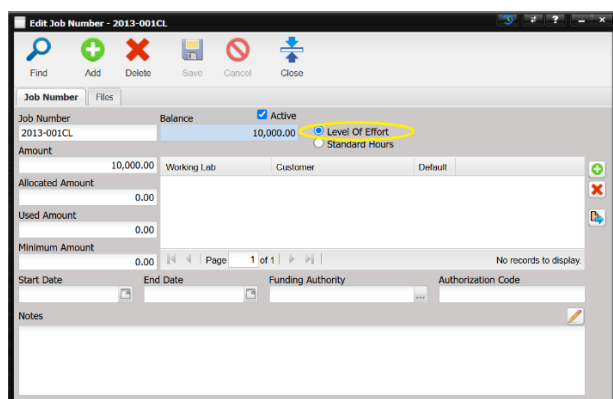
Note: The dollar amount on the labor record WILL NOT change once saved even if the labor rate changes. To adjust the dollar amount the labor record must be deleted and reentered.

- Change the Std. Price on the “FundingExample” procedure to \$0, keep the ISO Cert check box unchecked on the Work Order, the Return screen displays a cost of \$375.
 - Calculation = 5 (std hours)* \$50 (customer rate) + 2.5 (labor hours on Work Order) * (customer rate)
 - If the Customer hourly rate is removed from the Facility screen, this calculation remains the same because the labor was added prior to the Customer hourly rate being removed.

Job Number – Level of Effort

The following provides an example of how costs are calculated using the Level of Effort algorithm.

- Using the Job Number created previously; select the radio button “Level of Effort”.



2. Receive Asset 5500A-202 into the Servicing Lab by selecting the Receiving menu option and then Processing the Asset. Notice the Job Number is brought into the Receiving screen. Open the Work Order that was created.

Edit Work Order - 2021000052

Barcode: 5500A-202, ID: 5500A-202, Customer: Cal Lab Inc, Service Type (WO): Calibration, Status: Received

Model Number: 5500A, Serial Number: 202, Department: My Lab, QC Approved By: My Lab, QC Approved Date: My Lab

Manufacturer: Fluke, Authority: Default, Job Number: 2021-001CL, Working Lab: My Lab, Administrative Lab: My Lab

Description: Calibrator, Contact Info: My Lab, WO Results: My Lab

Service: Extended Data, Log Notes, Labor / Files, Standards / Accreditations, Notes, Parts, Sub Contract / Estimate, Results (22)

Required Date: 07/26/2021, Priority: 3, Open Date: 07/12/2021, Service Date: 07/12/2021, Interval: 12, UOM: Months, Due Date: 07/12/2022

Work Order Number: 2021000052, Certification Number: 2021000052, Default Procedure: FundingExample

Sticker Type: Calibration, Procedure Used: FundingExample

Cert Format: calcert.rpt, Initial Condition: In Tolerance, Temperature: 23

Assigned Tech: John Doe, Reason for Service: Normal Cycle, Humidity: 40

Technician: John Doe, Work Area: Electronic, Pressure:

On Site: ☒, Expedite: ☒, Sub Contracted: ☒, ISO Cert: ☒, Cancelled: ☐, Received OOT: ☐, Return No Maint: ☐, Rejected: ☐, Optional 1: ☐, Optional 2: ☐

3. Entering a Service Date, Due Date, and complete the Work Order by creating a Log Note. Then select the Return button at the top of the screen.
 - The Return screen displays a cost of \$75 which is derived from the ISO Cert Fee from the FundingExample procedure.
 - Calculation = \$75 (ISO Cert Fee)

Returning

Print, Process, Close

Returned To:

Customer	ID	Cost	Serial Number	Model Number
Cal Lab Inc	5500A-202	75.00	202	5500A

Return button at the bottom left.

- Enter Labor of 2.5 hours using the Labor/Files tab. When the Return button is selected the Return screen displays \$200 which is derived from the labor charge and the ISO Cert Fee.
 - Calculation = 2.5 (labor hours) * \$50 (customer Rate) + \$75 ISO Cert Fee.

Returning

Print, Process, Close

Returned To:

Customer	ID	Cost	Serial Number	Model Number
Cal Lab Inc	5500A-202	200.00	202	5500A

Return button at the bottom left.

Adding Labor

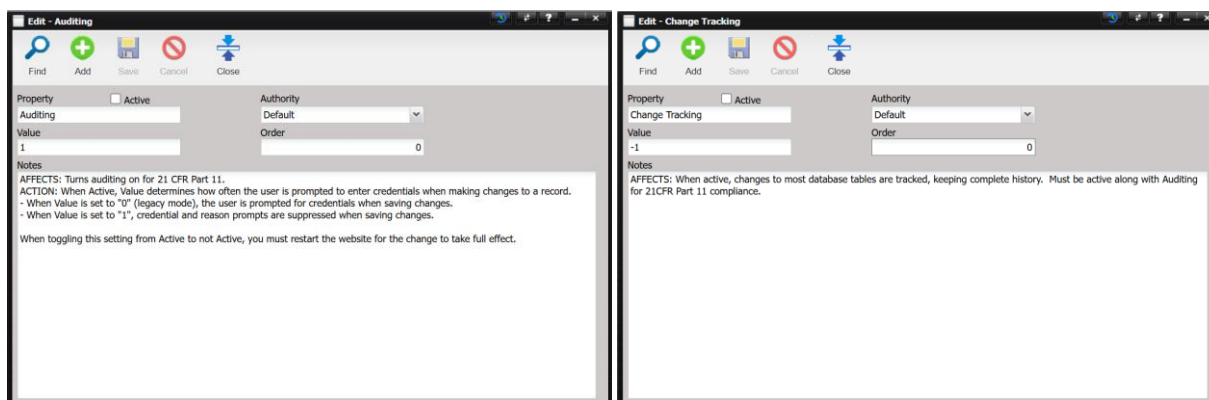
The Labor screen appears when adding labor from the Work Order Labor/Files tab and from the My Work screen.

- **No Charge** – Tells the system when calculating labor costs, this time entry should not be included in the labor charge. This check box cannot be customized because the functionality is associated with the calculated Cost field on this screen.
- **Start Date** – The date of the time record.
- **Duration** – The duration of the labor in hours and tenths. This is designed to be entered daily. The maximum value is 24 hours and the minimum is 0.
- **User** – Name of the person entering the labor record.
 - The user can be changed by selecting the “...” button.
- **Job Number** – The job number this labor is charged to (pre-filled with the Work Order job number)
 - The job number can be changed by selecting the “...” button.
- **Category (Lbr)** – The category of the labor (not required).
 - The category can be changed by selecting the “...” button.
- **Sub Category (Lbr)** – The subcategory of the labor. (not required)
 - The sub category can be changed by selecting the “...” button.

Labor can also be added from MET/CAL when a procedure is completed. See **Labor - MET/CAL** system default for configuration options.

Auditing and Change Tracking

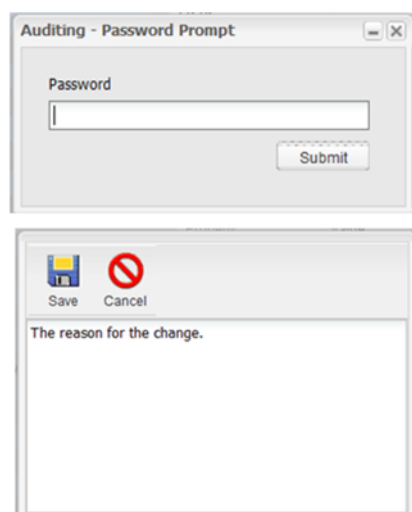
MET/TEAM provides the ability to track changes. There are two System Defaults used for tracking changes: Auditing and Change Tracking.



Auditing

When Auditing is active and the **Value** is set to a value of “0” (or any value other than “1”), the user is prompted for a password. If the password is correct, a dialog is displayed for entering a reason for the change. A change reason must be entered before selecting the Save button. When Auditing is active and the **Value** is set to a value of “1”, the user is not prompted for a password or reason for the change.

Note: Changing the active state of the Auditing System Default requires users to log off and close the browser for the change to take effect.



Note: To view the auditing history, the Change Tracking System Default must be active.

Change Tracking

When auditing is not required but tracking of changes is desired, activate the Change Tracking System Default. When active, changes to most of the database tables are tracked, keeping a history.

Note: Change tracking operates on the database level, which means that the tracking mechanism is not limited to screens that show the actual change tracking history icon/button. Unless a table/column is not included in tracking, any change to it, from MET/TEAM, MET/CAL, or running a query in SQL Server Management Studio is captured. For the latter case, the user that made the change, or the application the change came from, may be inaccurate because the information may not be available.

History Log

The history of changes made due to Auditing or Change Tracking being active can be viewed by selecting the History Log button in the upper right hand corner.

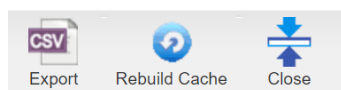
1. Enable the Change Tracking System Default.
 - When Change Tracking is **active** and Auditing is **inactive**, changes are logged to the database. The user making the change is not prompted to enter a reason for the change. In this case, the History Log indicates “N/A – Auditing inactive” in the Reason column because Auditing was inactive.
 - When Change Tracking is **active** and Auditing is **active** and the **Value** for Auditing is set to a value of “0” (or any value other than “1”), the user making the change is required to enter a reason for the change.
2. Go to the screen where the history changes were made or that you are interested in viewing.
3. Select the History Log button next to the Refresh button on the upper right hand corner of the screen.



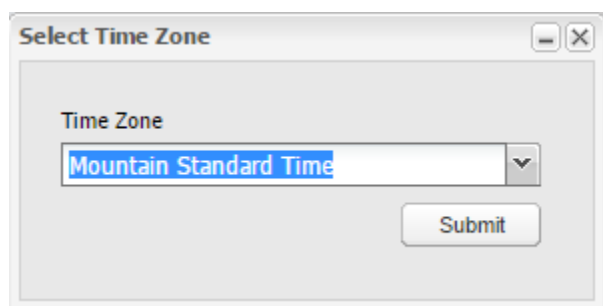
4. The History Log dialog is displayed. Select the “+” on the left side to expand that particular change and view the details.

Date	Changed by	User Name	Application	Table Name	Reason
06/23/2021 13:43	System Administrator	Admin	MET/CAL	Assets	N/A - Auditing inactive
06/23/2021 13:42	System Administrator	Admin	MET/CAL	Assets	N/A - Auditing inactive
06/07/2021 16:05	System Administrator	Admin	MET/TEAM	Assets	N/A - Auditing inactive
06/24/2020 15:23	System Administrator	Admin	MET/TEAM	AssetEx	N/A - Auditing inactive
06/24/2020 15:23	System Administrator	Admin	MET/TEAM	Assets	N/A - Auditing inactive
06/24/2020 14:17	System Administrator	Admin	MET/TEAM	AssetEx	N/A - Auditing inactive
06/24/2020 14:17	System Administrator	Admin	MET/TEAM	Assets	N/A - Auditing inactive
06/24/2020 14:16	System Administrator	Admin	MET/TEAM	AssetEx	N/A - Auditing inactive
06/24/2020 14:16	System Administrator	Admin	MET/TEAM	Assets	N/A - Auditing inactive

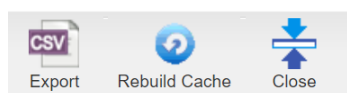
5. The information can be exported to a .CSV file format by selecting the Export button.



When exporting data to a CSV file, the Select Time Zone prompt is displayed. The drop-down lists all time zones with the same UTC offset as your current time zone. This is used to facilitate converting any exported dates to local time, including adjusting for Daylight Saving time, as applicable. Select the appropriate time zone to use for the export and click Submit to initiate the export process.



- History Logs for System Defaults can be viewed by editing the individual System Default and then selecting the “History Log” button from that individual System Default. The “History Log” button is not available on the System Defaults main screen.
 - History Logs for Calendar can be viewed by editing the individual Calendar task and then selecting the “History Log” button from that individual Calendar task. The “History Log” button is not available on the Calendar main screen.
 - History Logs for Data Checks can be viewed by editing the individual Data Check and then selecting the “History Log” button from that individual Data Check. The “History Log” button is not available on the Data Check main screen.
 - For tables that have an accompanying “Ex” table, e.g. Assets and Asset Ex, history is generated for the main record and/or the “Ex” record, in separate entries, depending on what was changed.
 -
6. The Rebuild Cache button launches a process that generates and stores the display values for foreign key references, i.e. records referenced in other tables, so that the History Log Viewer will display user readable information instead of the UID.



Rebuilding the cache should be done when:

- It has never been done before
- When Change Tracking has been turned off for a while and is turned on again

Report Writing with Crystal Reports 2013

Helpful Links

SAP Community Forum for Crystal Reports

<http://scn.sap.com/community/crystal-reports>

SAP Crystal Solutions: What's New in 2013 (PDF)

Whitepaper:

<http://www.sdn.sap.com/irj/scn/go/portal/prtroot/docs/library/uuid/809f9f8e-8f32-3110-f8bf-e34cd2298343>

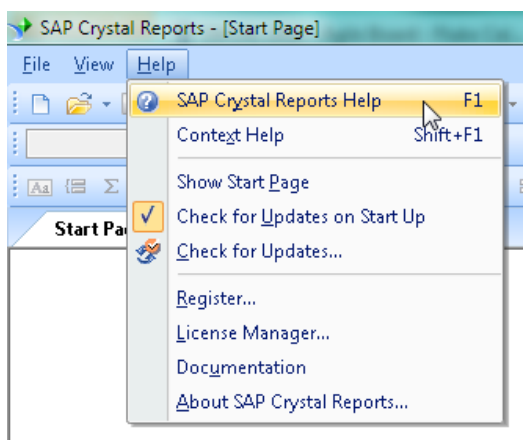
SAP - Comparison of Features by Version for the SAP Crystal Reports Family (PDF)

Whitepaper:

<https://www.sapstore.com/medias/Reports-Versions.pdf?context=bWFzdGVyfHJvb3R8Mjg2MzA0MXhchBsaWNhdGlvi9wZGZ8aGU2L2hkMy84Nzk3MTg0MTk2NjM4LnBkZnwyODczZWlwZGY2MTImZTlzMzkyYTVmYmE5NDFiNmZjNDM0ZjY3MTg3NzhIMTY0N2VjMjE3NDQ2YWVjYjg4Yzg1>

Online Help (CHM)

This is accessible from the Crystal Reports Designer, under Help, SAP Crystal Reports Help (F1)



Prerequisites

MET/TEAM has been installed on the web server or the current PC, running standalone. The database installed is called METTEAM and can be accessed using the MET/TEAM application. The report writer has to have db datareader access at a minimum to the database, via integrated security (domain account access) or an explicit user name and password, provided by the SQL Server® administrator.

The data used for demonstration purposes is what is available via the default database installation option.

Note: To successfully run the Turnaround Time Report on just the default data, it may be necessary to update *CallSheetResults.nTechnicianUID* with a valid *Users.nUserID*.

This can be done like this, for example:





```
UPDATE dbo.CallsheetResults SET nTechnicianUID = (SELECT nUserID FROM dbo.Users WHERE
cUsername = 'fluke') WHERE nTechnicianUID IS NULL;
```

Furthermore, CallSheets.tOpenDate may contain the same value as CallSheets.tMaintDate. In order to produce a more illustrative report, an update like this may be of help:

```
UPDATE dbo.CallSheets SET tOpenDate = DATEADD(DAY,-2,tOpenDate) WHERE tOpenDate =
tMaintDate
```

Do not run these updates on production data.

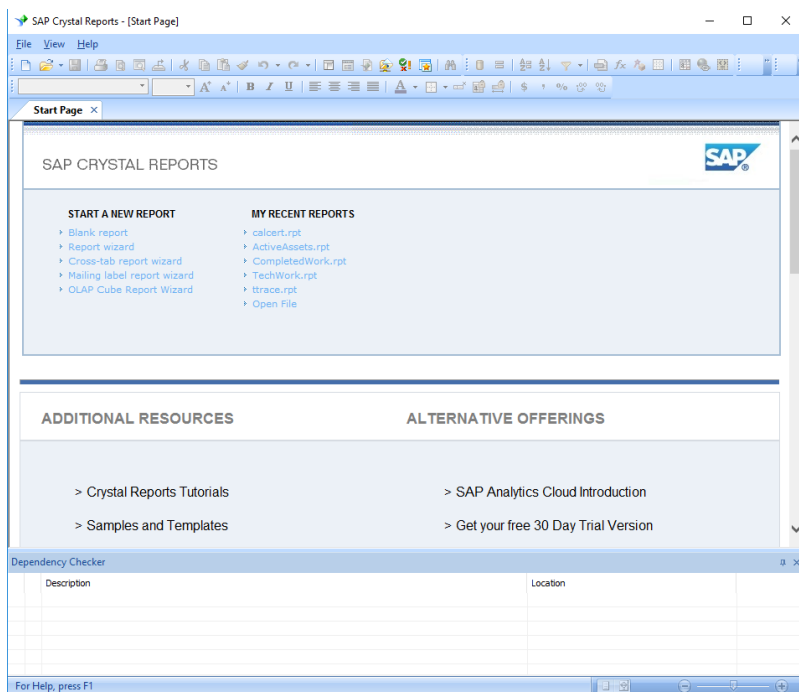
Crystal Report Icons

Button Icon	Use
	New Report
	Record Sort Expert
	Insert Line
	Insert Box



Creating a Simple Report

To open the Crystal Reports Designer, click Start > SAP Business Intelligence > Crystal Reports 2013.

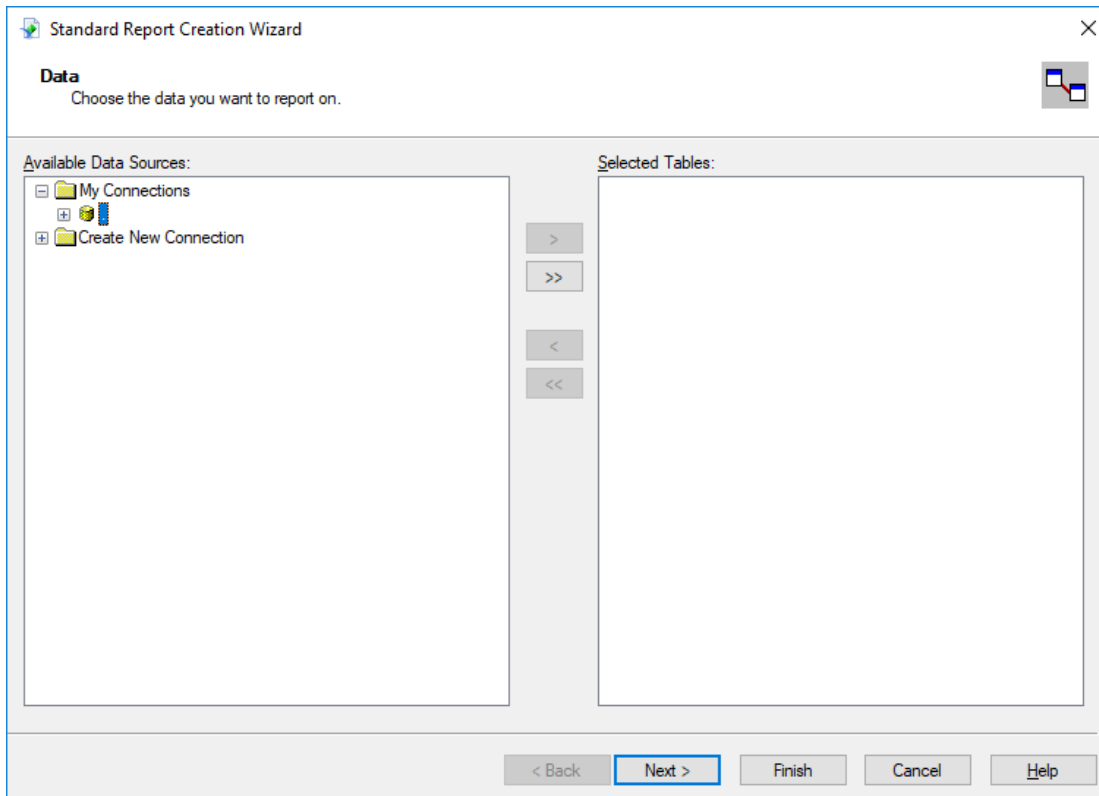


The shortcuts on the startup screen provide options to create a blank report, launch one of several report wizards, as well as opening an existing report, via recent report shortcuts or the Open File shortcut.

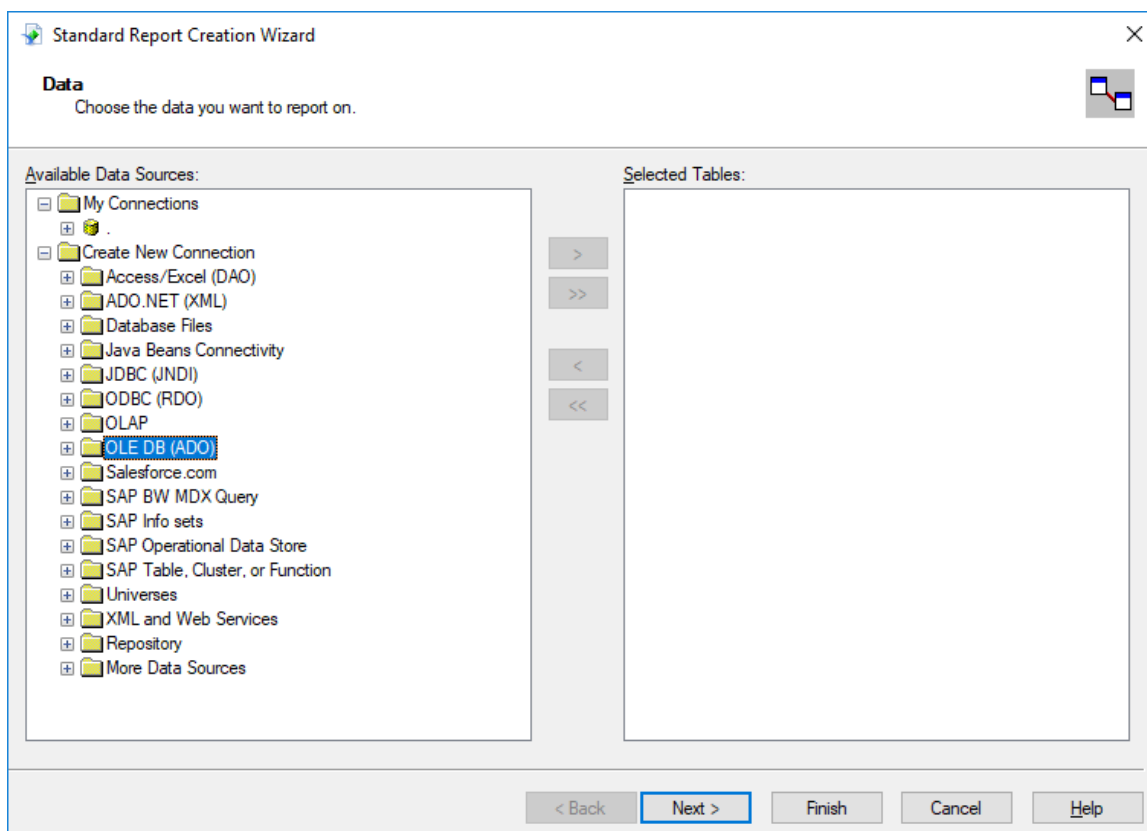
Start a new blank report via the Standard Report shortcut, pressing CTRL+N or clicking the New Report icon on the top toolbar.

Connecting to the database

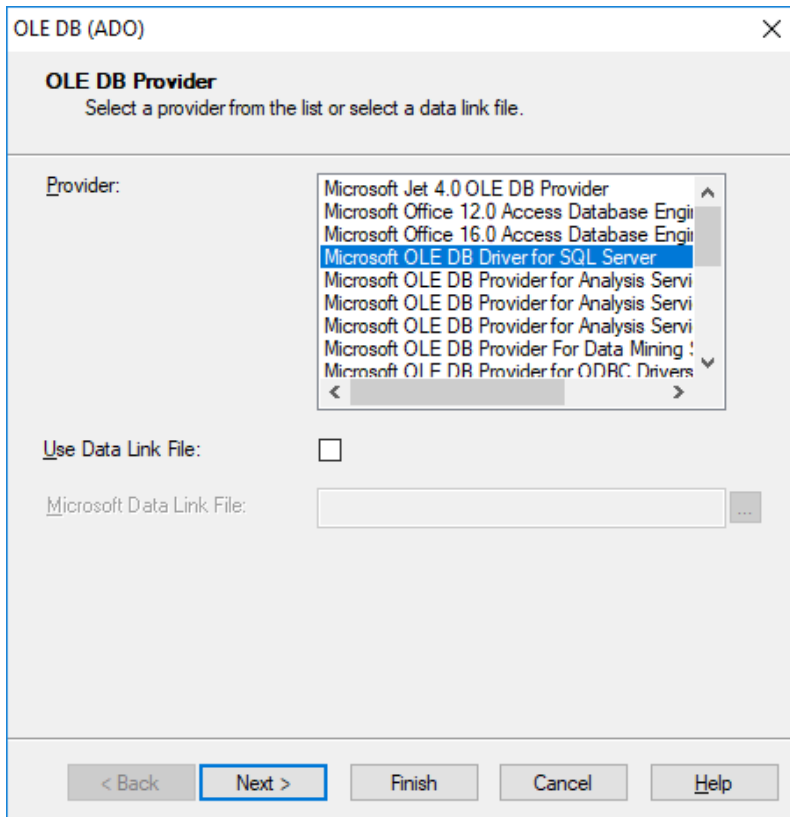
The Standard Report Creation Wizard window opens and from here we will add database items to the report.



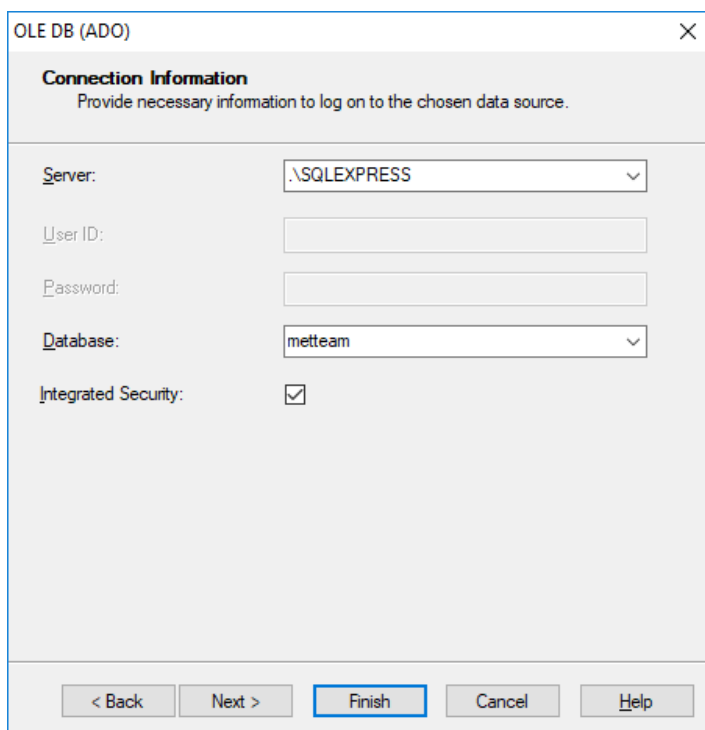
Expand the Create New Connection, and then expand OLE DB (ADO).



Select the **Microsoft OLE DB Driver for SQL Server** in the **Provider** list.



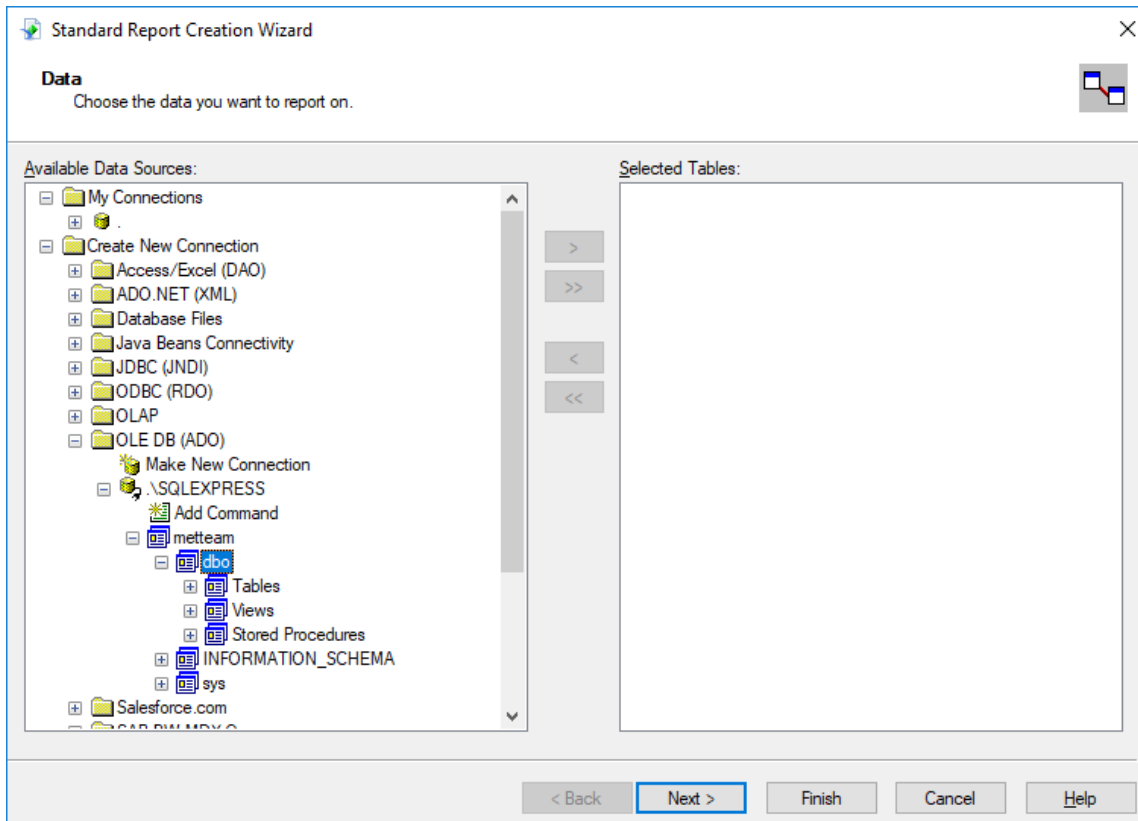
Press the Next button and on the OLE DB (ADO) Connection Information screen, set the server to connect to in the dropdown, enter user credentials and set the METTEAM database in the Database dropdown. Optionally, you can connect by selecting the Integrated Security checkbox. No user ID or password is required with this option, but it does require that Database Authentication is enabled on the server.



The image shows a Windows-style dialog box titled "OLE DB (ADO)" with a close button (X) in the top right corner. Below the title bar is a section labeled "Connection Information" with the instruction "Provide necessary information to log on to the chosen data source." The main area of the dialog contains five fields: "Server:" with a dropdown menu showing ".\SQLEXPRESS"; "User ID:" with an empty text box; "Password:" with an empty text box; "Database:" with a dropdown menu showing "metteam"; and "Integrated Security:" with a checked checkbox. At the bottom of the dialog are five buttons: "< Back", "Next >", "Finish" (which is highlighted with a blue border), "Cancel", and "Help".

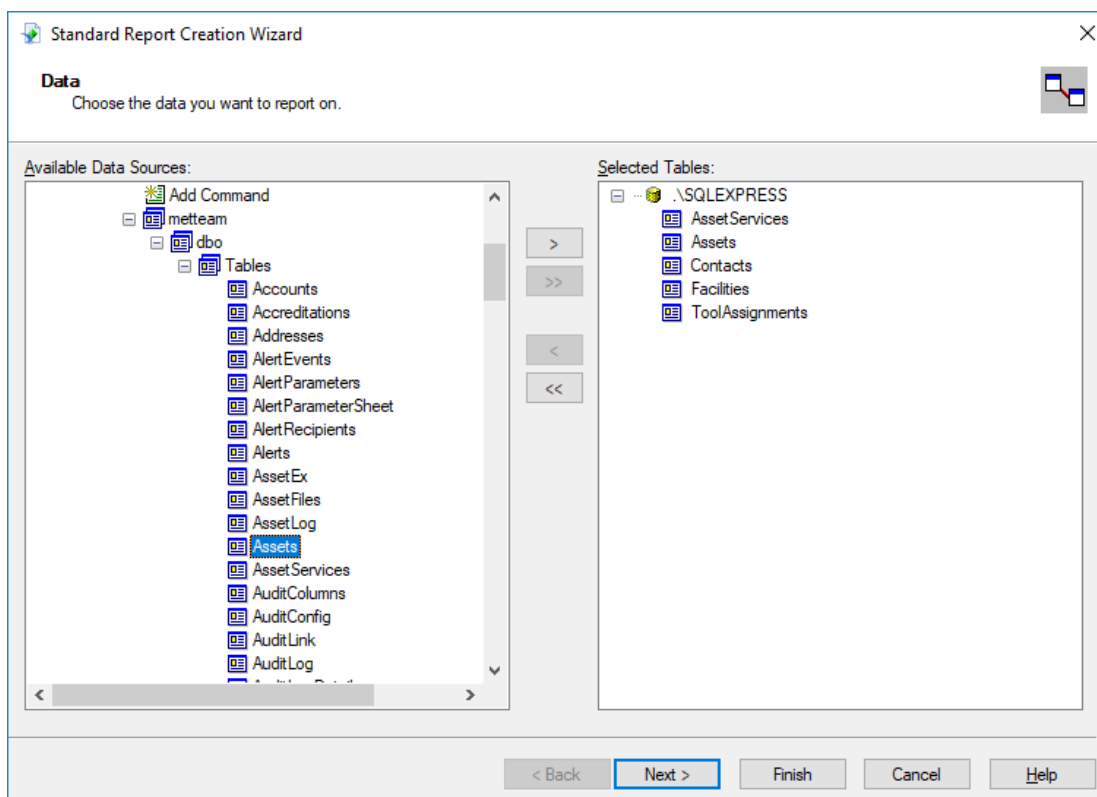
Adding tables to the report

Press Finish, which will close the OLE DB (ADO) dialog and get us back to the Standard Report Creation Wizard window, where METTEAM is now available under OLE DB (ADO). Expand the dbo (database owner) node to list the types of items we can add to the report, namely Tables, Views and Stored Procedures.

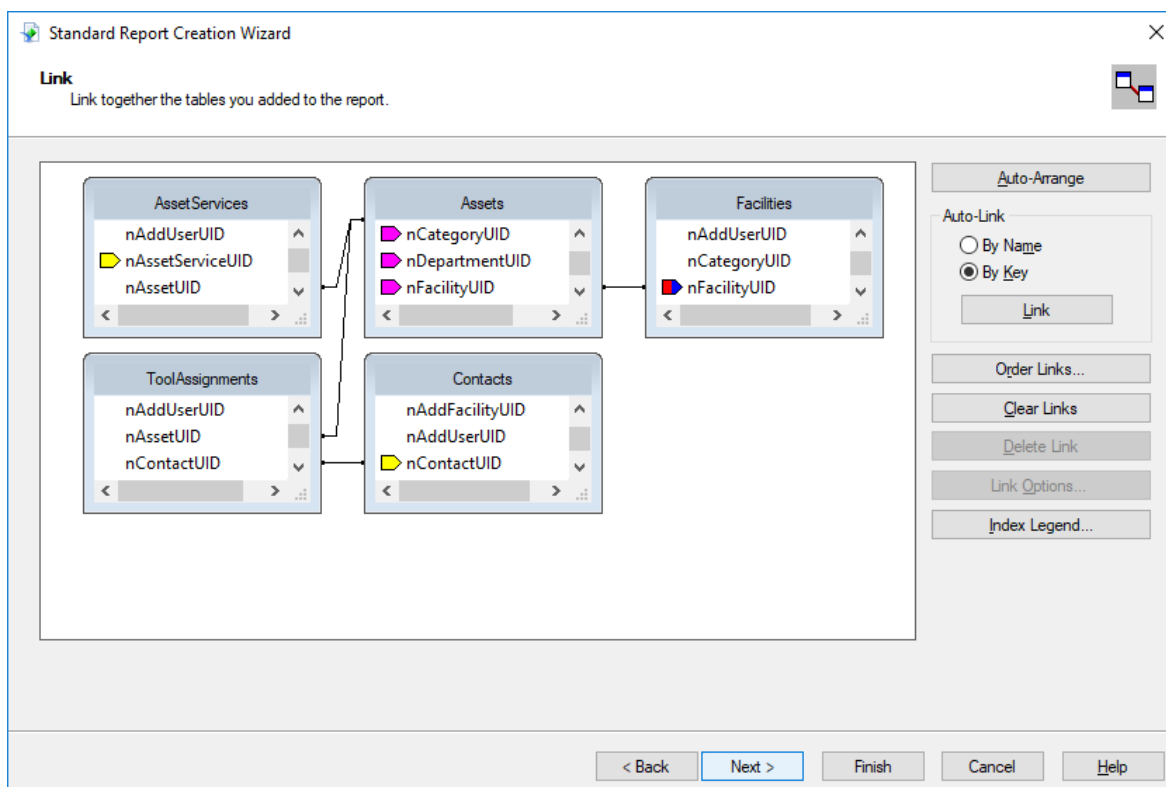


Select the following tables, copying each to the right box using the arrow > button:

- Assets
- AssetServices
- Contacts
- Facilities
- ToolAssignments



Press the Next button to show the linking between the tables.



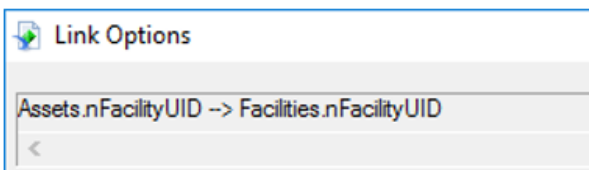
Our Report will be a simple **Assets Due for Calibration** Report. In order to select the data used in the report it is necessary to understand which MET/CAL tables we will be using and how they are linked.

For our report we will need fields:

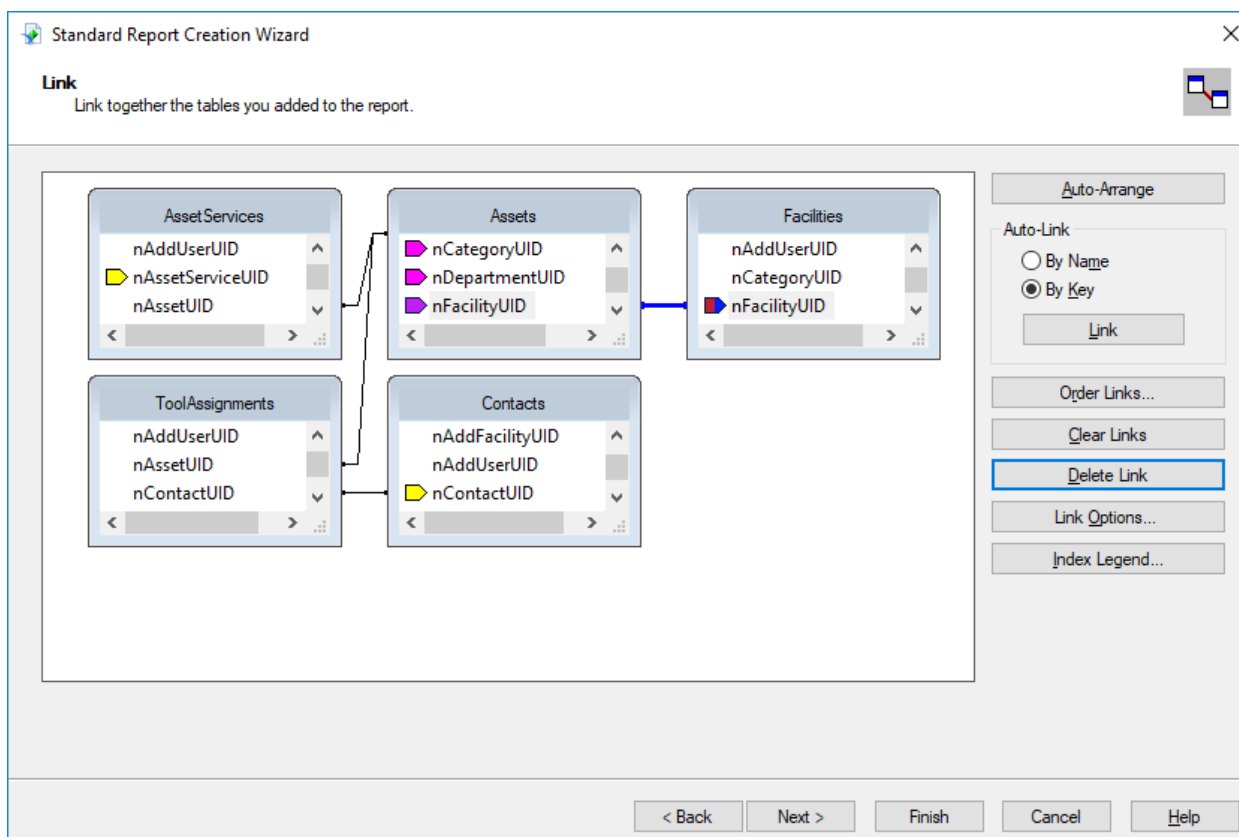
Assets.cID	Asset ID
Facilities.cFacilityName	Manufacturer
Assets.cModelNumber	Model
Assets.cDescription	Description
Contacts.cFirstName	User (First) Name
Contacts.cLastName	User (Last) Name
AssetServices.tNextMaintDate	Cal Due Date

The link between Assets and AssetServices as well as ToolAssignments is via the nAssetUID field in each of the tables. The Contacts to ToolAssignments link is via the nContactUID field in both tables. Each of these links is found automatically by the Databases Expert. For the link from Assets to Facilities, we need to make sure that we get the facility for the manufacturer, via the nManufacturerUID in Assets. The automatic smart link performed by the Database Expert defaults to the Asset's owner link, i.e. nFacilityUID in Assets is linked to nFacilityUID in Facilities.

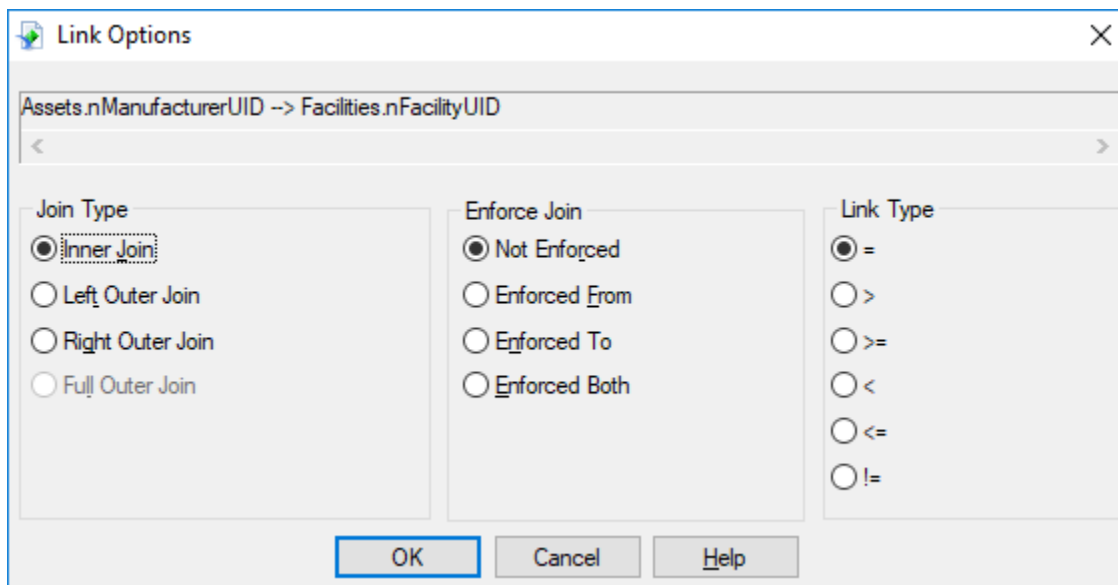
Right-click the link between Assets and Facilities, and select Link Options.



To relink Assets and Facilities correctly, let's delete the automatic link and insert a new one. Highlight the link between Assets and Facilities, so it turns blue, and press the Delete Link button.



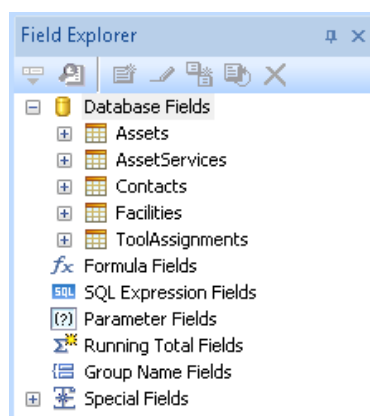
Now locate nManufacturerUID in the Assets field list and drag the pointer symbol to the nFacilityUID column in the Facilities field list. A new link is established, highlighted in blue. Double-check we have the correct link by right-clicking on it and selecting Link Options again.



Now, Assets and Facilities are joined correctly and Facilities.cFacilityName in our result set will reflect the Asset's manufacturer name. Press the Finish button to close the Standard Report Creation Wizard.

Inserting Data Fields

Now let's turn our attention to the Field Explorer on the right side of the main designer window. If it is not already visible, on the main menu bar, click View then Field Explorer.



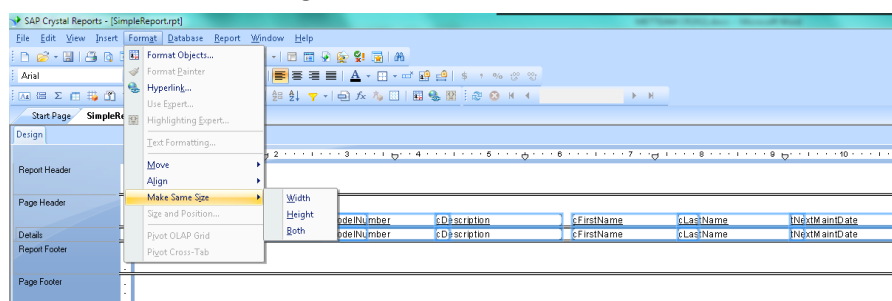
Expand Assets, then select and hold the cID field. A box will appear on your cursor when moved out of the Field Explorer box. Move your cursor to the Details Section of your report and place it where you want the data to show on your report and click the mouse button. If you placed the data box in the Details Section an automatic heading will appear with cID in the heading. We will adjust the headings once all the fields have been added to the report. Now proceed with the other data fields for the report.

Changing Field Formats

It may be necessary to change the size of the data fields. Left-click to highlight the field, then move the mouse cursor to the small resizing handle on one of the ends of the highlighted box. The mouse cursor will change into a double arrow. Hold down the left mouse button and change the size of the field. Do the same for the respective heading. Better yet, select both field and heading (left-click while holding the CTRL key), to resize both at the same time.

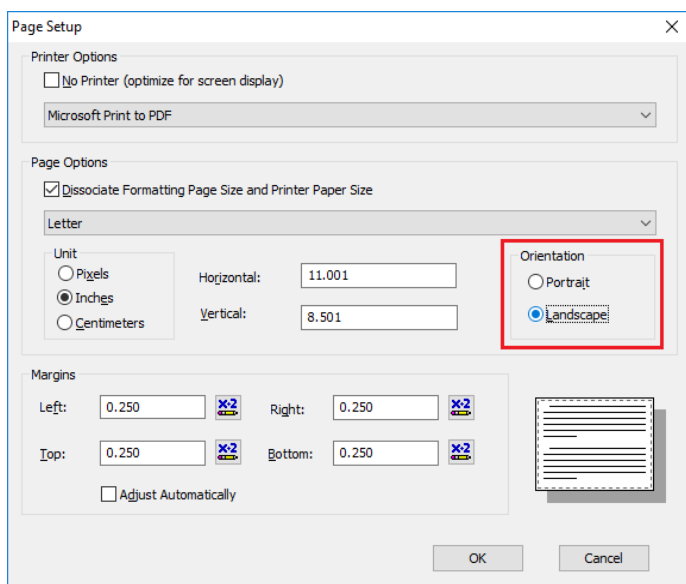
Formatting Assistance

On the main menu, under Format, there are several options to re-arrange the fields. Select the fields you want to re-arrange by holding the CTRL key and left-clicking with the mouse (select all by pressing CTRL+A) and explore the options on the Format menu, Align and Make Same Size.



Changing the Report Orientation

Since the selected fields are rather large, it may be best to change the report orientation to Landscape format. To do that, go to Page Setup on the File menu and change the Orientation to Landscape.



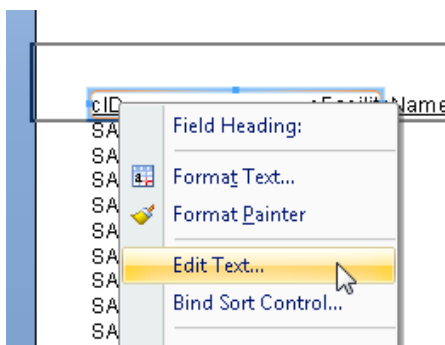
Keep in mind that these options may vary, depending on the printer selected.

Previewing the Report

Let's take a look at what the report will look like at this point. Do this by pressing the F5 key, to preview the report. The report will appear just the way it would be if printed at this point. In Preview mode, you may also move the data around by highlighting the data field and holding down the left mouse button, drag the data field to where you wish it and let go.

Adjusting the column headers

Changing the column headers from their default database field names to more user friendly descriptions is something we had planned to do but not yet done. The report preview is the perfect place to adjust the headings, since we will see right away how it will be printed later. Right-click each heading and select Edit Text. Alternately, left-click the heading and press F2.



Now type the new heading for each field, Asset ID, Manufacturer, Model, Description, First Name, Last Name and Cal Due Date. To change font, color, bold, etc. select the Format Text option from the right-click menu instead.

Inserting Text Fields

Now let's add a title to the report. We can add text in two ways:

- Type the text directly onto the report.
- Insert a text object.

For this example, we will insert a text object. To insert a text object, click Insert on the main Menu and choose Text Object. Move the cursor to position the text object in the Header section then click. Type in: Assets Due For Calibration. When finished, Click anywhere off the edit text object box. **Note:** It is easier to do this in design mode.

To show a field's label as it is displayed in the MET/TEAM UI, place the field name into the text field. For example, if you would like to use the label for the procedure used during a test, *{Procedures.cProcedureName}* is inserted into the text field. MET/TEAM knows to get the label for the field specified. By default, MET/TEAM uses "Procedure Name" as the label for this field. If the report is rendered in a supported language, the translation for the label is printed.

If the label has been customized, MET/TEAM prints the customization to the report. If the customized label is in the translations table, MET/TEAM prints the translation. Otherwise, the customized label is printed.

Formatting Fields

Now we have a basic Assets Due for Calibration report. Let's spend some time formatting the fields so that they are presentation quality. Let's begin by formatting the report title. We need to expand the title size to the width of the report.

1. Increase the font size of the title to 14 point by clicking on the font size down arrow.
2. Click the Report Title field to select it.
3. Position your cursor on the right edge of the field box until you get a double-arrow resizing cursor.
4. Drag the right edge of the field box until it is even with the right edge of the data in the right column in the Preview Window. You may need to release the field box, scroll the window to the right, and then continue expanding the field box until it is even with the right edge of the column.
5. Scroll to the left edge of the Preview Window when finished. What you have done now is created a large field that extends from the left edge to the right edge of your report. Now we're going to center align the title in that field so it will automatically be centered above your report date.
6. At the bottom of the window is the Format Bar. Click (the center alignment button) to center the report title inside the text field.

To format a field, right-click on the field and a pop-up menu will appear. Use Format Text... to change the font, font size, style, effects, border and/or color for selected elements on the report.

Our report should look something like this:

Assets Due For Calibration						
Asset ID	Manufacturer	Model	Description	First Name	Last Name	Cal Due Date
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	B.	COLEMAN	9/21/2006 10:49:29AM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	R.	FALKNER	9/21/2006 10:49:29AM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	J.	JARVIS	9/21/2006 10:49:29AM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	B.	EICHNER	9/21/2006 10:49:29AM
SAMPLE-8842	FLUKE	8842	DMM	D.	DEAVER	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	D.	COBB	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	D.	CRANE	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	N.	DUNN	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	P.	PEDERSON	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	P.	DAGG	9/21/2006 10:50:21AM
SAMPLE-8842	FLUKE	8842	DMM	D.	RAWLINS	9/21/2006 10:50:21AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	D.	DEAVER	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	F.	KEEL	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	J.	HECK	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	F.	DAVIS	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	K.	FARROW	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	J.	FAY	3/9/2007 10:40:09AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	A.	CASE	3/9/2007 10:40:09AM
SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	D.	DEAVER	2/27/2007 10:42:47AM
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	D.	DEAVER	3/2/2007 10:41:35AM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	D.	DEAVER	3/9/2007 10:43:24AM
SAMPLE-732	FLUKE	732	DC REFERENCE STD	D.	DEAVER	3/9/2007 10:43:24AM
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	L.	ECCLES	9/21/2005 10:54:13AM
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	L.	ECCLES	9/21/2005 10:54:13AM
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	R.	ISAC	9/21/2005 10:54:13AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	D.	DEAVER	9/21/2005 10:54:58AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	S.	POWERS	9/21/2005 10:54:58AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	D.	GALLOWAY	9/21/2005 10:54:58AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	K.	PHILLIPS	9/21/2005 10:54:58AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	J.	BENSON	9/21/2005 10:54:58AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	M.	Lee	9/21/2005 10:54:58AM

Selecting Records

The report we just created shows all of the data from the tables joined together in our query, which yields multiple records per Asset, due to inactive records that need to be excluded from the result set.

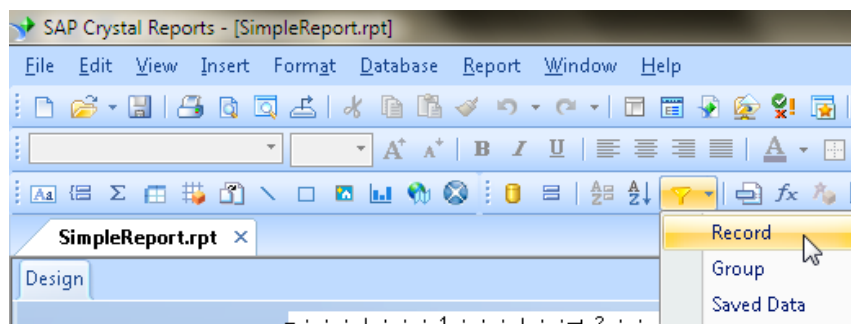
Crystal Reports provides two options for selecting records:

- Select Records Expert, which we are going to use here, and
- Edit Record Selection Formula, which is covered later.

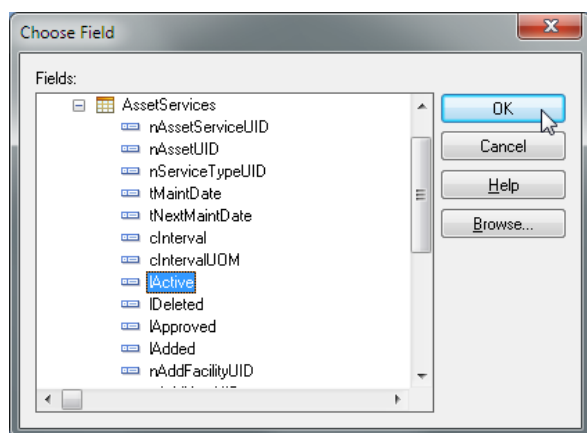
Record Selection using the Select Records Expert

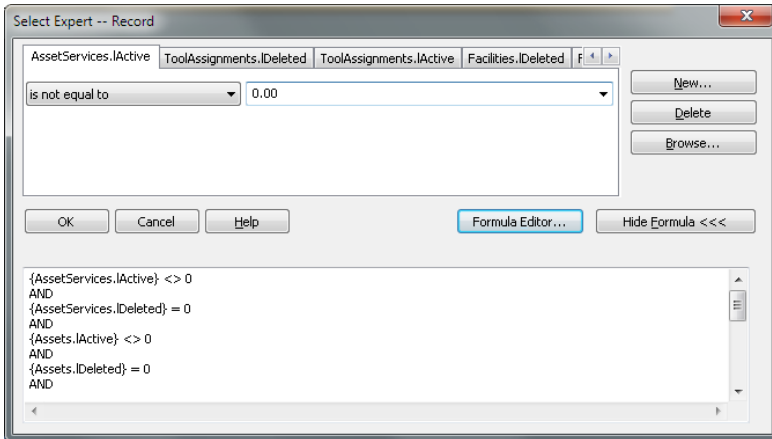
The Select Records Expert is a straightforward way to create a record selection expression. It will guide us through the creation process. There are three ways to access the Select Records option:

- Select a field and click the right mouse button to reveal a pop-up menu. Choose Select Expert Record... from the menu.
- Choose Selection Formulas, Record from the Report menu. The Formula Workshop Record Selection Formulas Editor dialog box will appear.
- Click the Select Expert dropdown on the button bar and select Record.

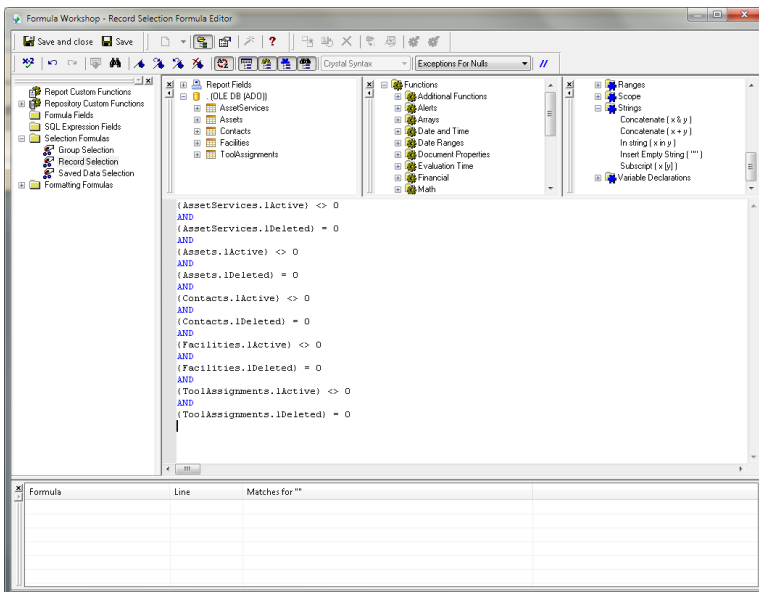


For each table in the report, first select the IActive field, select *is not equal to* and enter 0; then select the IDeleted field, select *is equal to* and enter 0. Press the New... button on the Select Expert to navigate to the next field.

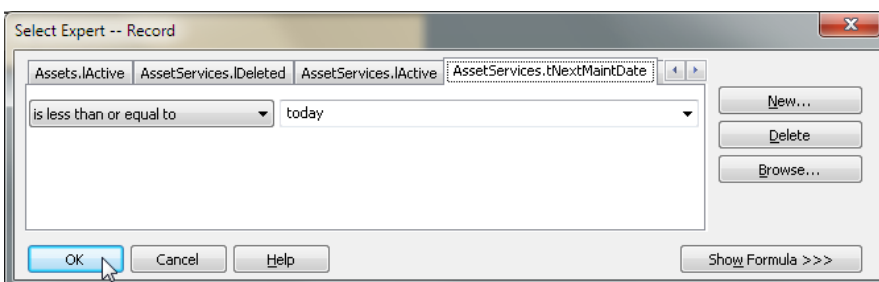




We can also enter all the filters in the Formula Workshop. To repeat, we want to exclude all records that are inactive or deleted. IActive on each record should not be 0 and IDeleted on each record should be 0:



Finally, let's make sure the cal due dates aren't in the future, by limiting AssetServices.tNextMaintDate to dates less or equal to today.



Now, the report is reduced to the relevant data set:

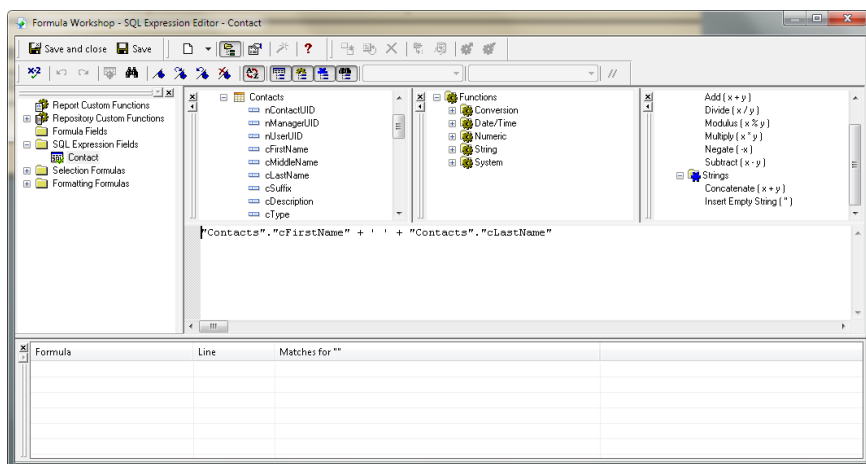
Assets Due For Calibration

Asset ID	Manufacturer	Model	Description	First Name	Last Name	Cal Due Date
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	B.	EICHNER	9/21/2006 10:49:29AM
SAMPLE-8842	FLUKE	8842	DMM	D.	RAWLINS	9/21/2006 10:50:21AM
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	A.	CASE	3/9/2007 10:40:09AM
SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	D.	DEAVER	
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	D.	DEAVER	2/27/2007 10:42:47AM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	D.	DEAVER	3/2/2007 10:41:35AM
SAMPLE-732	FLUKE	732	DC REFERENCE STD	D.	DEAVER	3/9/2007 10:43:24AM
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	R.	ISAAC	9/21/2005 10:54:13AM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	M r	Lee	9/21/2005 10:54:58AM

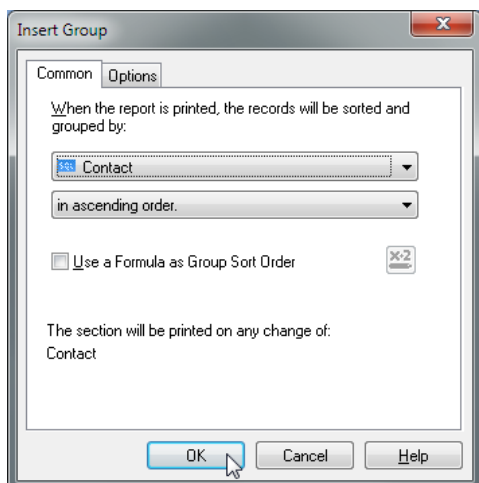
Inserting Groups

So far we have selected specific information for our report using record selection, but it is presented to us in the order which it is stored in the database. We can group information by report fields or even by fields that are not on the report. We would like to group information in this report by the contact and within that, sort the records by due date, then by model.

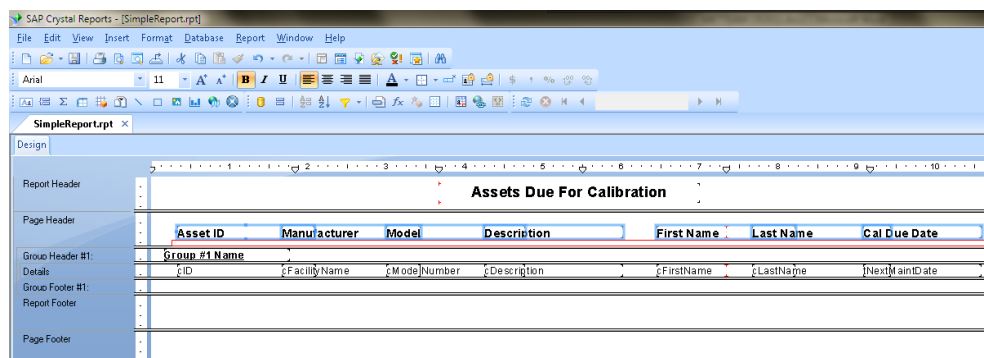
Since the contact consists of two fields, first and last name, we first make a SQL Expression, concatenating the two fields and call it "Contact".



Now select Group... from the Insert menu and select the newly created SQL Expression field, which has been added to the end of the report field list. Select *in ascending order* from the second dropdown.



Click OK. In the Design view we will see two new sections: the Group Header #1 and the Group Footer #1. Now we have the contact composite field above the group, but it is not pretty. So let's right-click on the Group #1 Name field and change the font to underline and bold, via Format Field.... We should also move the page headers up a notch, so that there is some space between the headings and the group headings. To do that, click the column headings one-by-one while holding the CTRL key. When all fields are selected, press the up arrow key, which will move the headings up a notch.

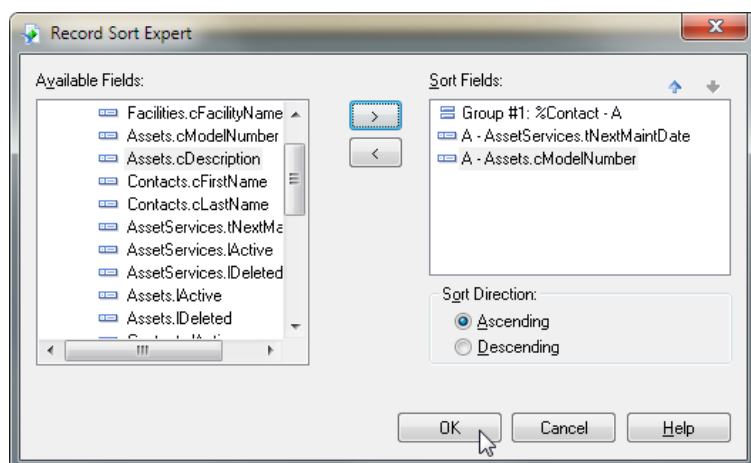


Record Sort Order

So far we have selected specific information for our report and grouped like information together. The records in each group are not sorted however; they appear in the same order as they appear in the database. Let's sort our report by due date and model. We can do this in two ways:

- Click Record Sort Expert button on the Button Bar, or
- Select Record Sort Expert from the Report menu

The Record Sort Expert dialog box appears.



The records are already sorted by the Contact composite field we created via the SQL Expression; now add AssetServices.tNextMaintDate and Assets.cModelNumber to the sort fields as well.

At this point, it makes sense to remove the first and last name columns from the report data since the information is already in the group headers. That way, we can save some real estate and change the page layout to portrait as well.

Now our report looks like this:

Assets Due For Calibration

Asset ID	Manufacturer	Model	Description	Cal Due Date
A. CASE SAMPLE-5500	FLUKE	5500A	CALIBRATOR	3/9/2007 10:40:09AM
B. EICHNER SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	9/21/2006 10:49:29AM
D. DEEVER SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	2/27/2007 10:42:47AM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	3/2/2007 10:41:35AM
SAMPLE-732	FLUKE	732	DC REFERENCE STD	3/9/2007 10:43:24AM
D. RAWLINS SAMPLE-8842	FLUKE	8842	DMM	9/21/2006 10:50:21AM
Mr Lee SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	9/21/2005 10:54:58AM
R. ISAAC SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	9/21/2005 10:54:13AM

Inserting Summaries

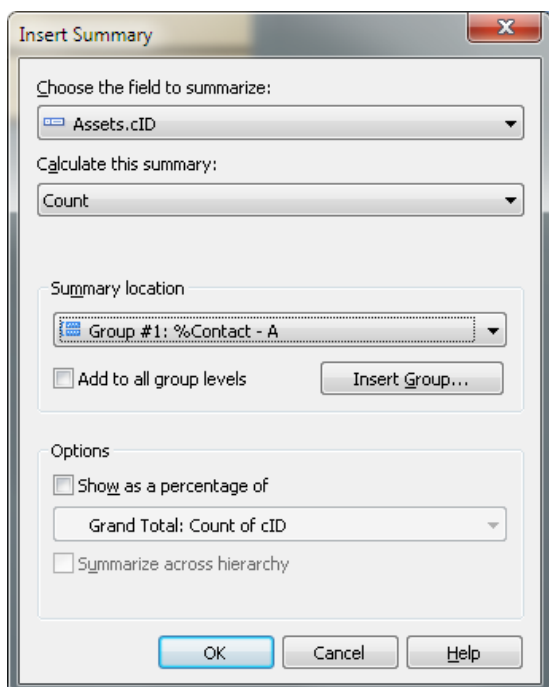
Now we have a report where we have selected specific information and grouped and ordered that information logically. Let's assume that we would like to add some summary information (for example a count of Assets Due for Calibration for a given user name). We add summary information into the Group Footer, where Summaries and Subtotals can be inserted.

Note: Crystal Reports allows you to group and summarize in a single step. We're using multiple steps to familiarize us with the fundamentals.

To Insert a Summary or Subtotal:

First we highlight the field we want to summarize. If the field is a string field, like Asset Number, then we are going to be inserting a summary such as a count of Asset Number for each user. If we had a numeric field, we would insert a subtotal. Right-click the cID field, select Insert, Summary. The Insert Summary dialog box appears. Select Count from the dropdown for calculating the summary. Select Group # 1 – %Contact - A from the Summary location dropdown. This will also add a grand total to the report footer.

The dialog box will look like this:



Insert Summary

Choose the field to summarize:
Assets.cID

Calculate this summary:
Count

Summary location
Group #1: %Contact - A

☐ Add to all group levels **Insert Group...**

Options

☐ Show as a percentage of
Grand Total: Count of cID

☐ Summarize across hierarchy

OK **Cancel** **Help**

Click OK and a number will appear below each user name group. Now put a text field on the report to tell what this number means by selecting Text Object from the Insert menu and typing “Subtotal for User:” into it. Position it in front of the number. Now our report will now look like this:

Assets Due For Calibration				
Asset ID	Manufacturer	Model	Description	Cal Due Date
A. CASE				
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	3/9/2007 10:40:09AM
Subtotal for user:				1
B. EICHNER				
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	9/21/2006 10:49:29AM
Subtotal for user:				1
D. DEEVER				
SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	2/27/2007 10:42:47AM
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	3/2/2007 10:41:35AM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	3/9/2007 10:43:24AM
SAMPLE-732	FLUKE	732	DC REFERENCE STD	3/9/2007 10:43:24AM
Subtotal for user:				4
D. RAWLINS				
SAMPLE-8842	FLUKE	8842	DMM	9/21/2006 10:50:21AM
Subtotal for user:				1
Mr Lee				
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	9/21/2005 10:54:58AM
Subtotal for user:				1
R. ISAAC				
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	9/21/2005 10:54:13AM
Subtotal for user:				1

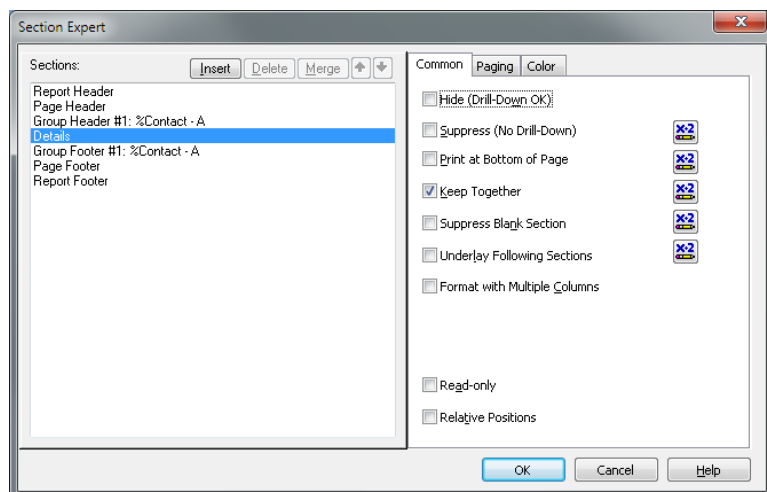
Formatting the Sections

We now have the information we want presented to us on the report. We have selected specific records, grouped records and sorted both records and groups. We have also placed some summary information on the report. We will now look at the formatting options available for entire sections. For example, we may want to insert a page break before each section or hide a section so it doesn't print.

To Format a Section

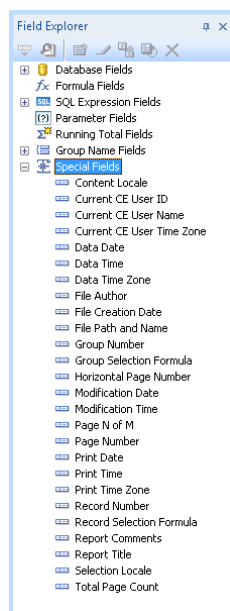
There are two methods for formatting a section:

- Right-click on one of the sections on the left of the Design Window. Select the Section Expert option.
- The Section Expert is also accessible from the Report menu



Inserting Special Fields

There is some information that is not in a database but is useful report information such as Report Date and Page Number. In the Field Explorer window on the right hand side of the screen, there is a node called Special Fields and underneath are the available options.



Select Page N of M and place it in the Page Footer.

Inserting Lines and Boxes

If we want to make some data stand out or just improve the presentation quality of our report we may wish to highlight it with lines and boxes.

To Draw a Line:

Use one of the following methods to draw a line:

- Click Insert Line button
- Select Line from the Insert menu

Once you have selected one of the above, you will see a pencil cursor on the screen. Click the left mouse button where you would like the line to be and holding down the mouse button, move to where the line should end and release the mouse button.

To Draw a Box:

- Click Insert Box button
- Select Box from the Insert menu

Once you have selected one of the above, you will see a pencil cursor on the screen. Click where you want the upper left corner of the box to be. Hold the mouse button and drag the pencil cursor to where the lower right corner should be placed on the report.

Using the above method, draw a line under the headers and a box around the report title.

Our report now looks like this:

Assets Due For Calibration				
Asset ID	Manufacturer	Model	Description	Cal Due Date
A. CASE				
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	3/9/2007 10:40:09AM
Subtotal for user: 1				
B. EICHNER				
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	9/21/2006 10:49:29AM
Subtotal for user: 1				
D. DEEVER				
SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	2/27/2007 10:42:47AM
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	3/2/2007 10:41:35AM
SAMPLE-732	FLUKE	732	DC REFERENCE STD	3/9/2007 10:43:24AM
Subtotal for user: 4				
D. RAWLINS				
SAMPLE-8842	FLUKE	8842	DMM	9/21/2006 10:50:21AM
Subtotal for user: 1				
Mr Lee				
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	9/21/2005 10:54:58AM
Subtotal for user: 1				
R. ISAAC				
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	9/21/2005 10:54:13AM
Subtotal for user: 1				

Page 1 of 1

Select Save As... from the File menu and give the report a name, for example Calibrations Due.rpt. We will build upon it in the following sections, so **make sure you have a copy of it in this stage**, to be able to go back to it later.

Advanced Report Writing

Using Formulas

Often we would like to present data slightly different than it is stored in the database. For example, we would like to see our report changed slightly to gather data on the average amount of time each instrument of a given type takes to go through the calibration process and how much time each technician spends working on a given instrument type. This will give valuable information about the efficiency of our calibration lab and the training of our techs. We can do this in MET/CAL by using Crystal Reports Formula fields.

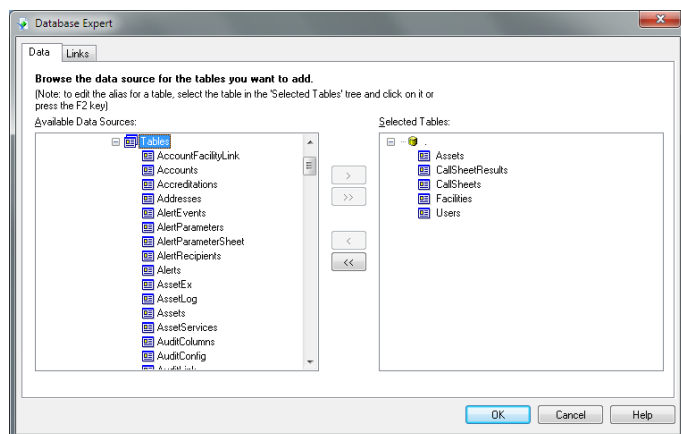
To do this report, we will use the report we just created, rename it by saving it as TURN.RPT. Our report will need the following information not on the report we just created:

- Work order open date
- Work order maintenance date
- Technician who did the calibration

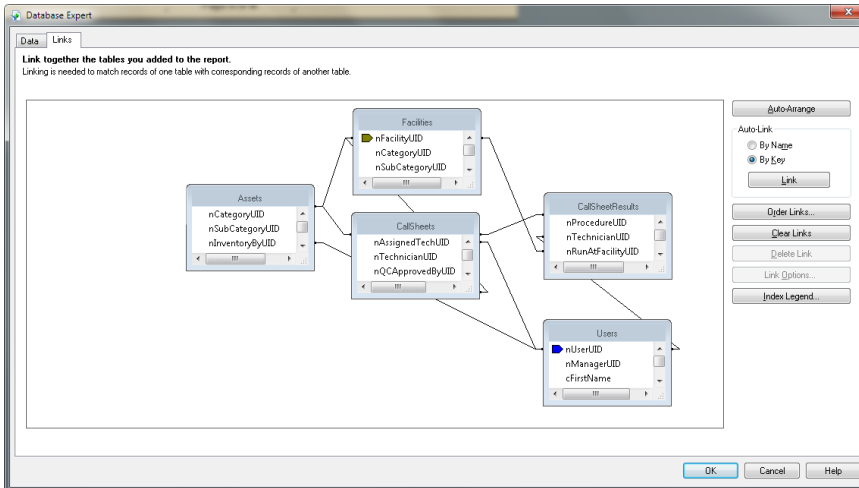
In order to do so, we need to add the work order table to the report, which is called **CallSheets**, as well as the **CallSheetResults** table, which contains the information about the technician. Since one CallSheets record can have more than one CallSheetResults record, we may get more than one technician returned, for who performed this calibration. The technician reference reflects the user that was logged into MET/CAL at the time of calibration. To get the user information, we will also need to add the **Users** table.

While we're adding these new tables we can get rid of tables we no longer need at the same time and remove **AssetServices**, **ToolAssignments** and **Contacts** from the tables on this report.

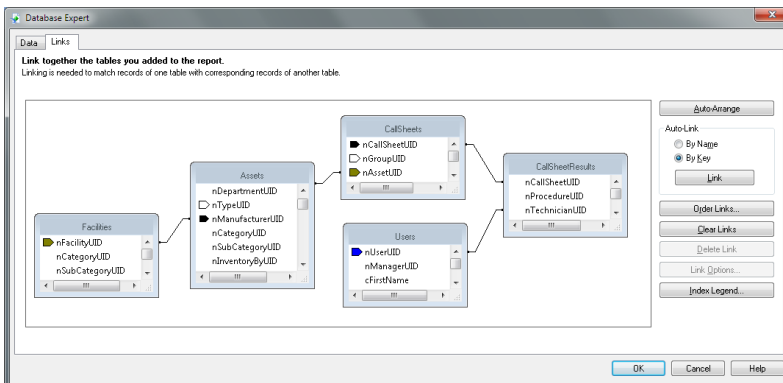
Let's go back to the Database Expert and swap out the tables:



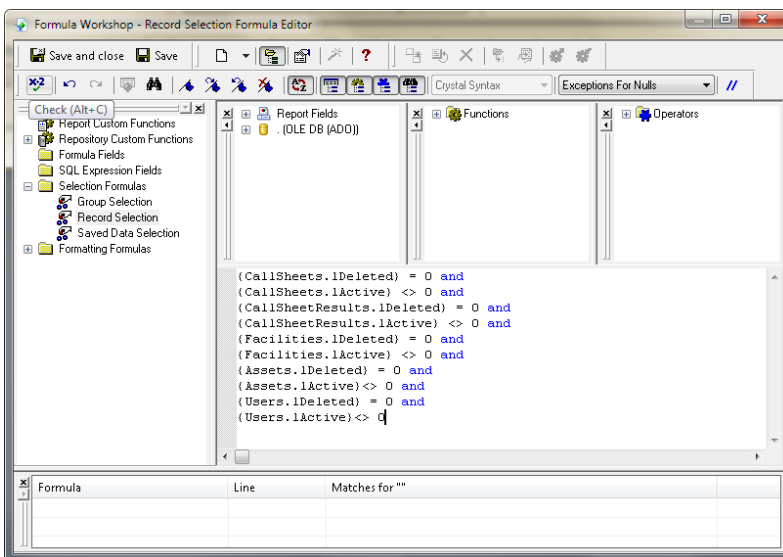
Now we need to do some cleanup of the automatic table linking performed by Smart Linking. Switch to the Links tab and delete all links to the Users table. Then add one link from CallSheetResults.nTechnicianUID to Users.nUserID. Likewise with Facilities, the only link we want is from Assets.nManufacturerUID to Facilities.nFacilityUID, as we had it set up prior to adding the new tables.



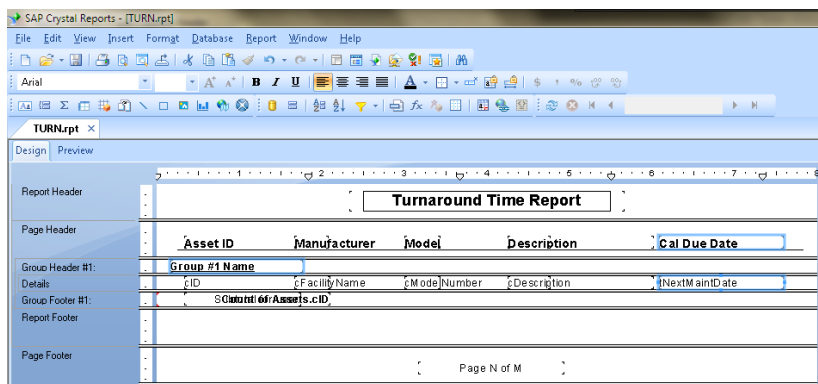
The final result should look like this:



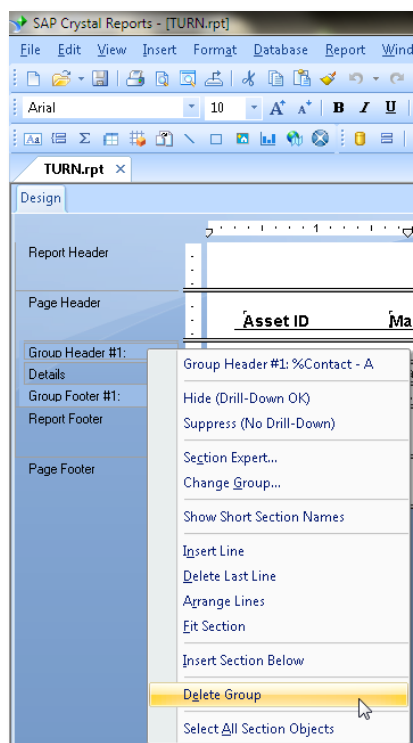
Now let's go back to the Formula Workshop, remove the fields of the tables that are no longer on the report and add the filters for IActive and IDeleted for the tables added. The final result should look like this:



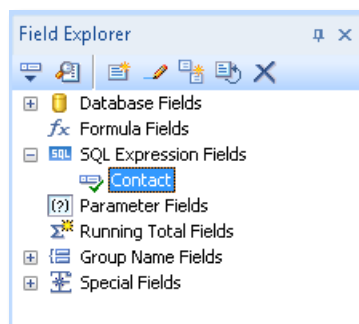
Now remove the fields for the due date and the composite field for the contact and change the report heading to "Turnaround Time Report".



Now right-click on Group Header #1 and select Delete Group.



On the Field Explorer on the right hand side of the report designer window, select the Contact SQL Expression Field and press the Delete key to remove it.



We will also need to develop a formula to calculate the amount of time spent in the lab. This assumes the open date is the date received into the lab and the maintenance date is the date it was shipped back to the user.

We now need to add these new data fields to the report:

- CallSheets.tMaintDate
- CallSheets.tOpenDate
- Users.cFirstName
- Users.cLastName

Since we removed one column and are now adding four, it will be best to change the report layout to landscape, in order to fit the data neatly.

Now add the new columns from the Field Explorer on the right hand side, Users.cFirstName, with a heading of “First”, Users.cLastName with a heading of “Last”, CallSheets.tOpenDate with a heading of “Arrive” and CallSheets.tMaintDate with a heading of “Ship”.

Like we did before, we need to change the headings from their default database column names and format them, so they are bold, 11 size and in the right place, aligning with the existing columns. Adjusting the columns is best done in preview mode, where changes are apparent immediately.

Our report should look like this:

Asset ID	Manufacturer	Model	Description	First	Last	Arrive	Ship
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	User	Fluke5	8/12/1994 4:57:34AM	8/14/1994 12:32:00PM
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	User	Fluke5	8/8/1995 5:27:33AM	8/10/1995 1:02:00PM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/12/1994 4:54:29AM	8/14/1994 12:28:00PM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/12/1995 5:24:28AM	8/14/1995 12:58:00PM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/8/1996 5:31:27AM	8/10/1996 1:05:00PM
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/9/1996 12:26:26AM	8/11/1996 5:00:00AM
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	9/29/1995 6:42:19AM	10/1/1995 2:16:00PM
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	9/29/1995 7:57:18AM	10/1/1995 3:31:00PM
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	8/12/1996 7:14:17AM	8/14/1996 2:48:00PM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	8/12/1995 5:10:57AM	8/14/1995 12:45:00PM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	11/7/1995 5:22:56AM	11/9/1995 12:57:00PM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	2/3/1996 2:36:55AM	2/5/1996 10:11:00AM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	4/29/1996 5:39:54AM	5/1/1996 1:14:00PM
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	7/26/1996 4:40:53AM	7/28/1996 12:15:00PM

We now have almost everything necessary to run this report except a way to do the necessary calculations. We will do this with a formula placed in the details section of our report.

Adding MET/TEAM labels to formulas

To show a field’s label as it is displayed in the MET/TEAM UI, place the field name in double quotes. For example, here is a formula to display the work order due date on the report.

```
"{CallSheets.tMaintDate}" & " : " & DateValue(ShiftDateTime({vw_CallSheetsWithAttCheck.tMaintDate},"UTC",0},""))
```

"{CallSheets.tMaintDate}" signals the MET/TEAM Report engine to get the label for the field specified. By default, MET/TEAM uses “Due Date” as the label. If the report is rendered in a supported language, the translation for the label is printed.

If the label has been customized, MET/TEAM prints the customization to the report. If the customized label is in the translations table, MET/TEAM prints the translation. Otherwise, the customized label is printed.

Getting a translation for a MET/TEAM dropdown field

When a dropdown item is selected in the MET/TEAM UI, the English word is saved to the database. MET/TEAM does a lookup from English to the browser language. For reports, we might want to print the translation for these fields. This can be done using formulas. The formula compares the field contents to a list of English words and then returns the translations. For example, the following formula is generating the translation for the cWorkOrderResults field.

```
select(trim({vw_CallSheetsWithAttCheck.cWorkOrderResults}))
case 'N/A': "N/A"
case 'Pass': "Pass"
case 'Pass Indeterminate': "Pass Indeterminate"
case 'Fail': "Fail"
case 'Fail Indeterminate': "Fail Indeterminate"
case 'Indeterminate': "Indeterminate"
Default: (trim({vw_CallSheetsWithAttCheck.cWorkOrderResults}));
```

The text to the left of the colon, is compared to the database field contents. The single quotes indicates the text shouldn't be translated. The text to the right of the colon can be the translated text or the English text used in the MET/TEAM UI. If the English text is used with double quotes, MET/TEAM will locate the translation based on the browser language and print it to the report.

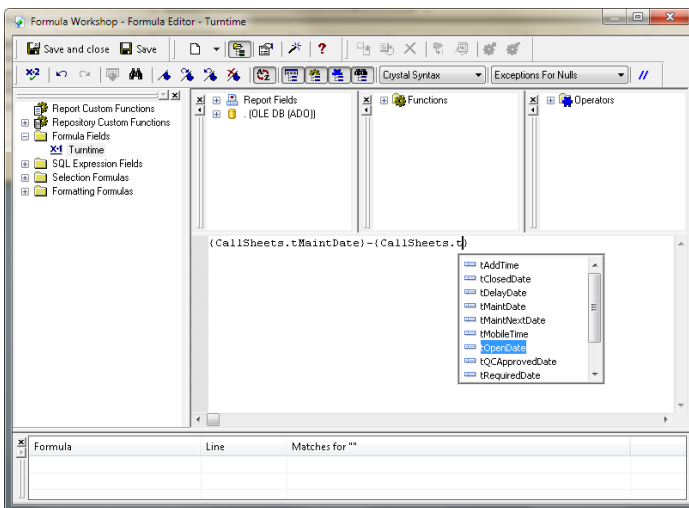
Inserting Formulas

To Insert a Formula Field:

- Click the Formula Workshop button
- Right-click Formula Fields in Field Explorer on the right hand side of the designer and select New...

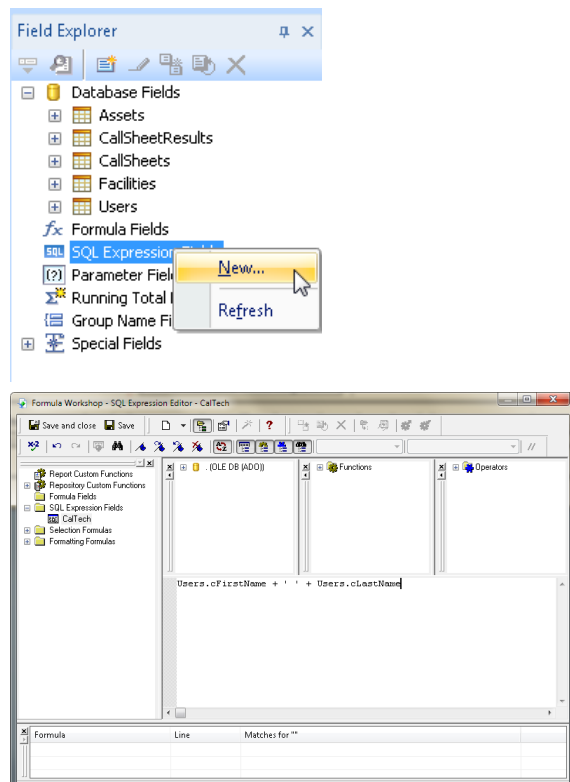
Name it "Turntime" and in the Formula Editor, type an opening curly brace which will start the guidance via popups, first offering a list of tables to select from. Select CallSheets and press enter. Now a new list will pop up with the fields for the selected table. Select tMaintDate and press enter. Then enter a minus sign and another opening curly brace. Repeat the process for CallSheets.tOpenDate and press enter.

What we have now entered is a formula to subtract the open date from the maintenance date. To check if the formula entered is valid, press the x-2 button on the toolbar.

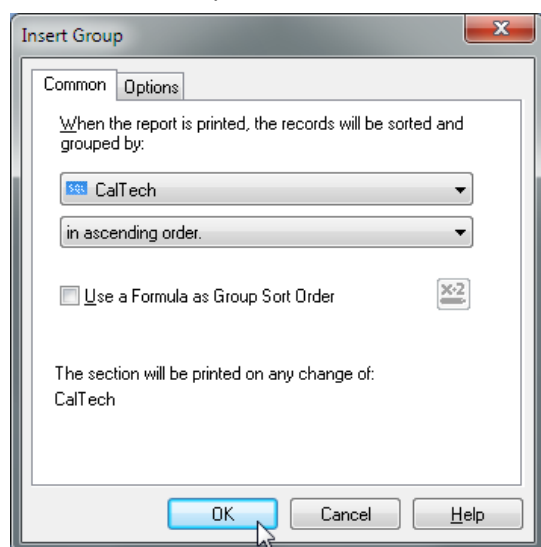


When the formula is valid, a message “No Errors Found” will pop up. At this time, press the Save and close button. Then add the newly created formula field Turntime to the report. Right-click the new field, select Format Field... and change the number format so that we won't get fractional days.

Now we can re-establish a record grouping, this time based on the cal tech. Again, first we'll create a composite column made up of Users.cFirstName + ' ' + Users.cLastName and name it CalTech.

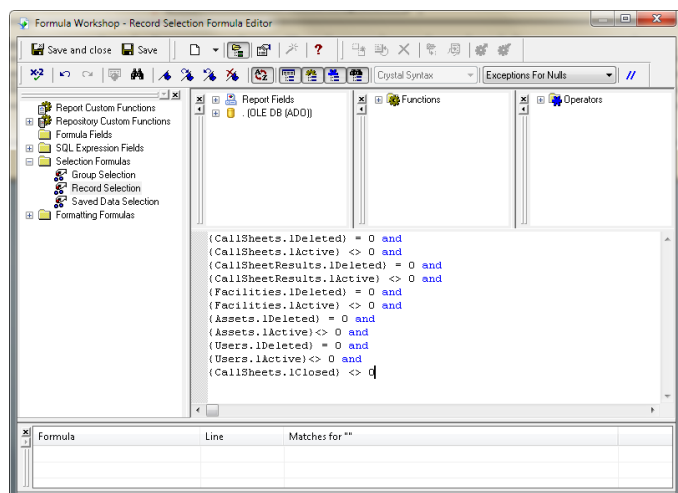


Then select Group... from the Insert menu and find the new CalTech column in the dropdown on the Insert Group dialog.



We want to make sure we're not looking at open work orders for this report, since they are still being worked on. For that, we'll only include records where CallSheets.IClosed <> 0 (i.e. true).

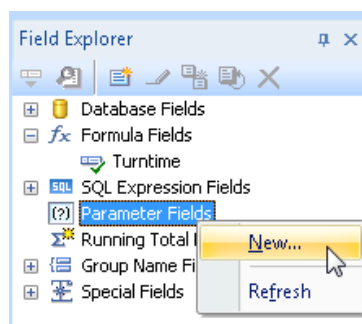
Go to the Record Selection Formula Editor by selecting Report, Selection Formulas, Records and add the condition.

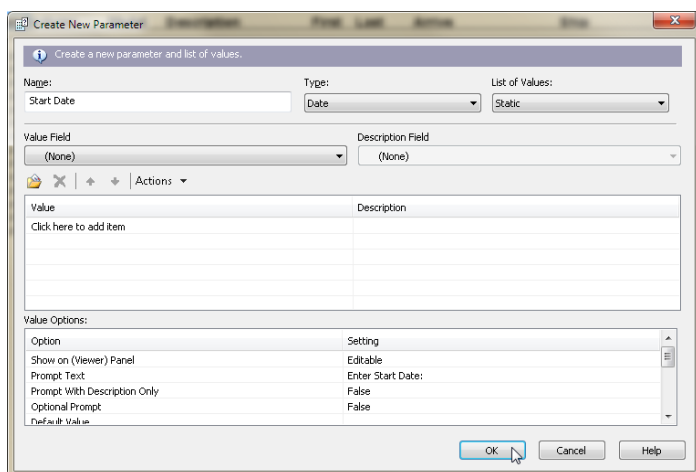


Now our report looks like this:

Turnaround Time Report								
Asset ID	Manufacturer	Model	Description	First	Last	Arrive	Ship	Turntime
User Fluke5								
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	User	Fluke5	8/12/1994 4:57:34AM	8/14/1994 12:32:00PM	2
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	User	Fluke5	8/8/1995 5:27:33AM	8/10/1995 1:02:00PM	2
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	8/12/1995 5:10:57AM	8/14/1995 12:45:00PM	2
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	11/7/1995 5:22:56AM	11/9/1995 12:57:00PM	2
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	2/3/1996 2:36:55AM	2/5/1996 10:11:00AM	2
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	4/23/1996 5:39:54AM	5/1/1996 1:14:00PM	2
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	7/26/1996 4:40:53AM	7/28/1996 12:15:00PM	2
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/12/1994 4:54:29AM	8/14/1994 12:28:00PM	2
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/12/1995 5:24:28AM	8/14/1995 12:58:00PM	2
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/8/1996 5:31:27AM	8/10/1996 1:05:00PM	2
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/9/1996 12:26:26AM	8/11/1996 8:00:00AM	2
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	9/23/1995 6:42:19AM	10/1/1995 2:16:00PM	2
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	9/29/1995 7:57:18AM	10/1/1995 3:31:00PM	2
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	8/12/1996 7:14:17AM	8/14/1996 2:48:00PM	2

To wrap up the turnaround time report, let's add some parameters, so that it will prompt for start and end dates of the time frame to be captured. In Field Explorer, right-click Parameter Fields and select New...





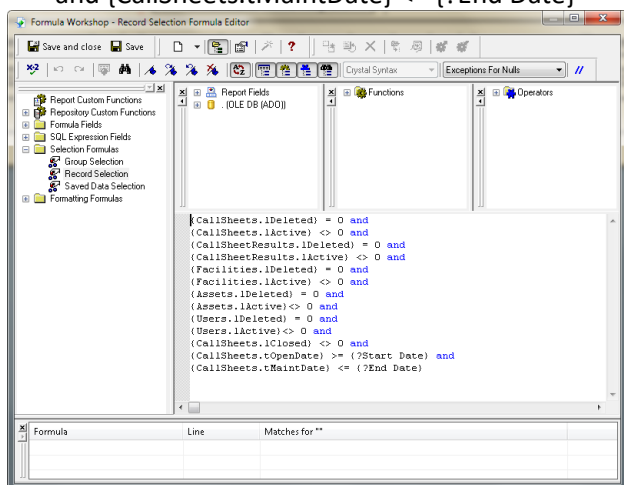
Name the new parameter Start Date, select a type of Date and Static for the list of values. Then repeat the process for the second parameter, called End Date.

Note: Although, the Crystal Report Designer allows for symbols (i.e. +, *, \$, #, etc) in parameter names, symbols should not be used in parameter names when writing reports for use in MET/TEAM.

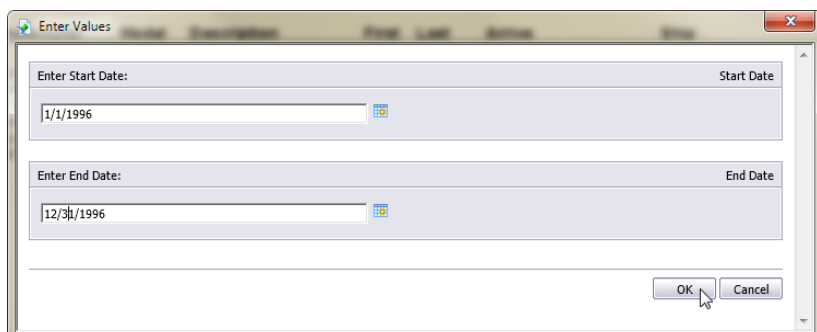
To tie into the new parameters, select Selection Formulas, Record from the Report menu and add these two lines:

and {CallSheets.tOpenDate} >= {?Start Date}

and {CallSheets.tMaintDate} <= {?End Date}



When refreshing the report via F5, we get a prompt for start and end date of the reporting period.



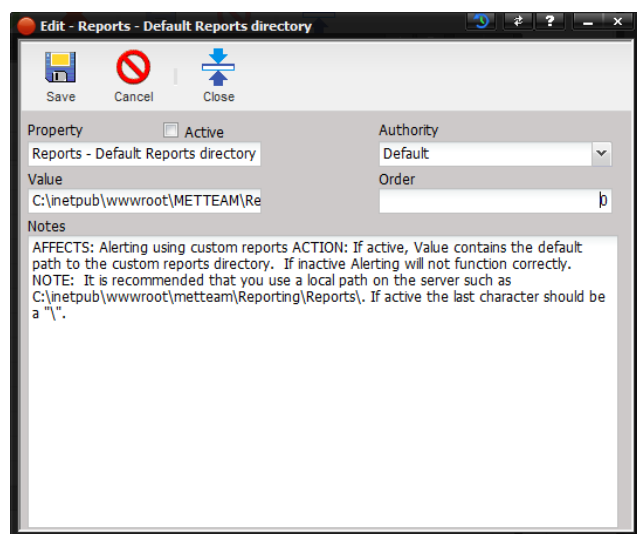
Now, the report data is limited to the one year time frame entered in the prompts.

Turnaround Time Report										
Asset ID	Manufacturer	Model	Description	First	Last	Arrive	Ship	Turntime		
User Fluke5										
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	2/3/1996 2:36:55AM	2/5/1996 10:11:00AM	2		
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	4/29/1996 5:39:54AM	5/1/1996 1:14:00PM	2		
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Fluke5	7/26/1996 4:40:53AM	7/28/1996 12:15:00PM	2		
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/8/1996 5:31:27AM	8/10/1996 1:05:00PM	2		
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Fluke5	8/9/1996 12:26:26AM	8/11/1996 8:00:00AM	2		
SAMPLE-8842	FLUKE	8842	DMM	User	Fluke5	8/12/1996 7:14:17AM	8/14/1996 2:48:00PM	2		

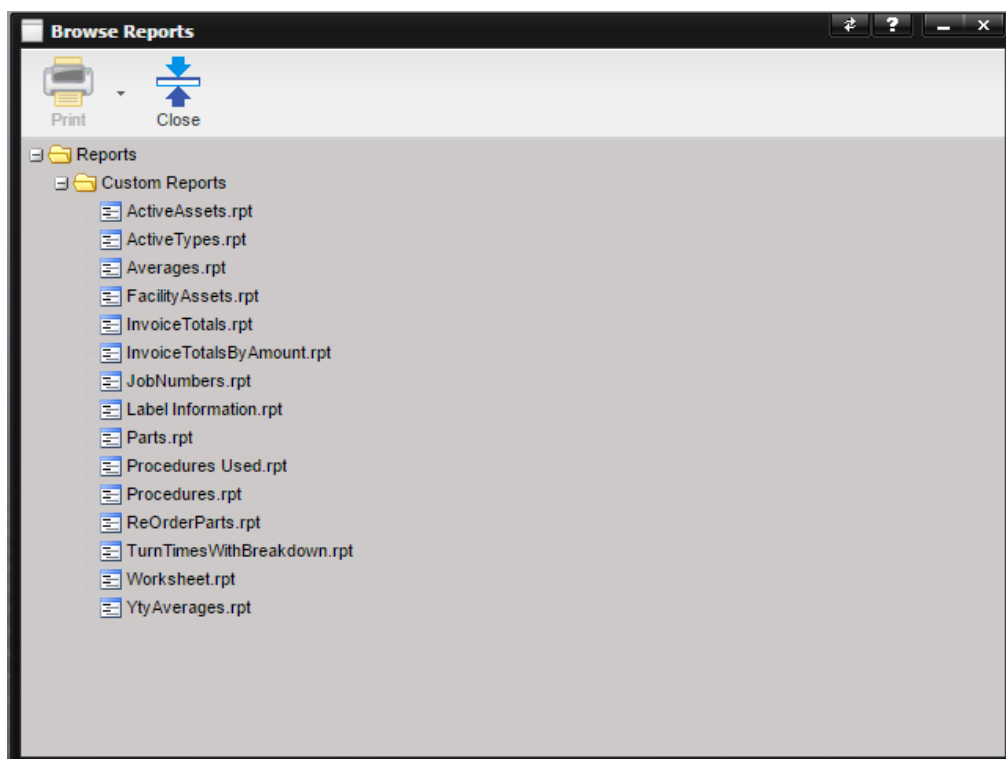
Adding a Report to MET/TEAM

Custom reports can be added to MET/TEAM by placing them in the directory identified in the Value field of the System Defaults “Reports – Default Reports directory”. Custom reports in MET/TEAM are listed by their report name.

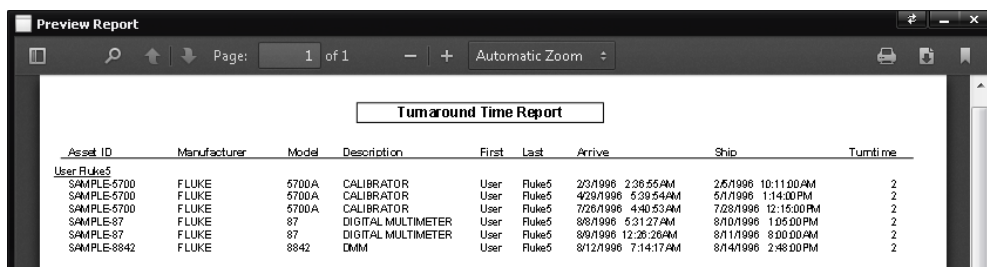
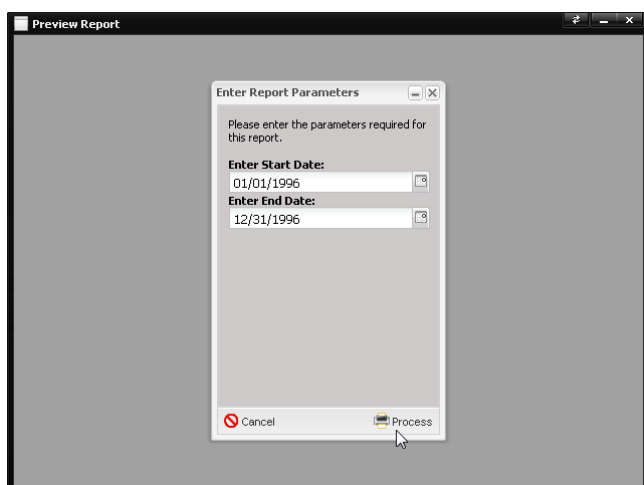
To see the directory where the custom reports are stored, select the System Defaults option from the Configure menu. Locate the System Default with the property of “Reports – Default Reports directory”.



The entry in the Value field must contain a valid location and the System Default must be active. Select the Active check box to make this System Default active. Copy the report to the directory shown in the Value field. Use the *Reports* menu and *Custom Reports* option to see the list of available customer reports.



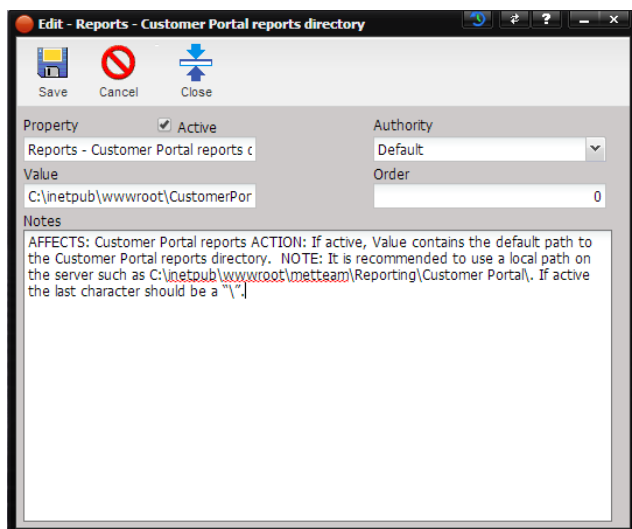
To run the report, either double-click the report in the list (which defaults to creating a .PDF) or highlight a report and then select Print (creates .PDF) or Export (creates .CSV) using the down arrow next to the Print button. If additional information is required to run the report, a parameter screen will be displayed. Enter the parameters and select the Process.



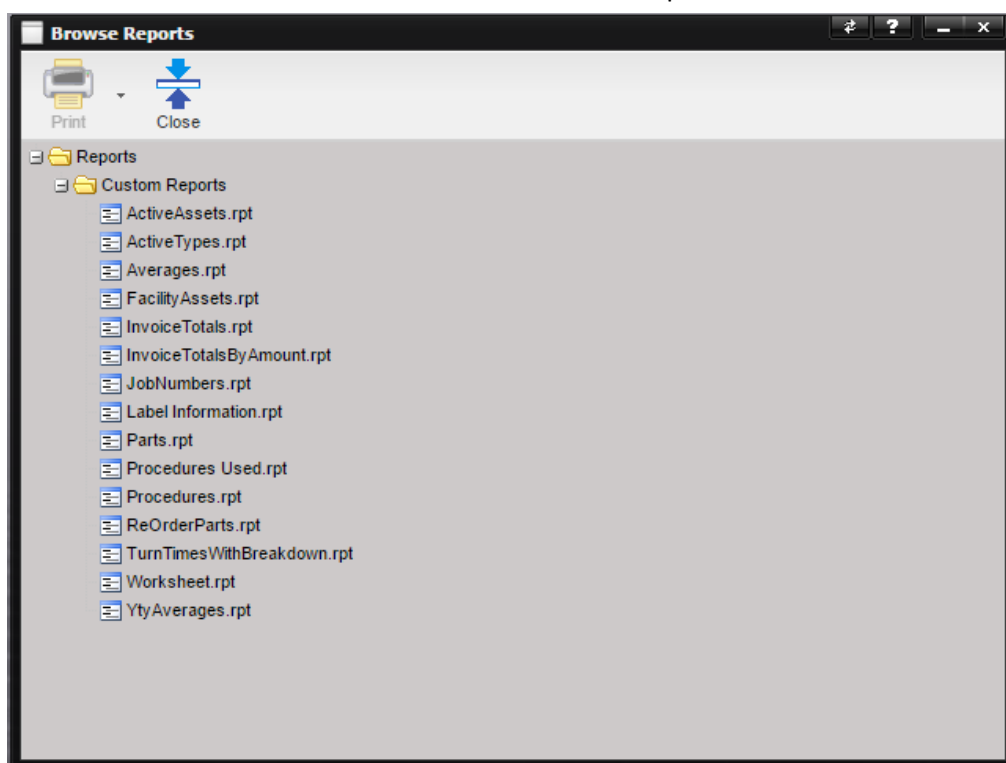
Adding a Report to Customer Portal

Custom reports can be added to Customer Portal by placing them in the directory identified in the Value field of the System Defaults “Reports – Customer Portal reports directory”. Custom reports in Customer Portal are listed by their report name.

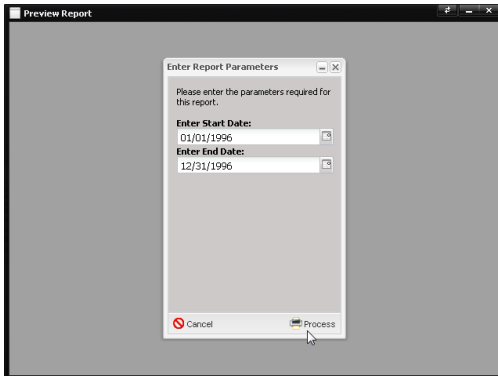
To see the directory where the custom reports are stored, select the System Defaults option from the Configure menu. Locate the System Default with the property of “Reports – Customer Portal reports directory”.



The entry in the Value field must contain a valid location and the System Default must be active. Select the Active check box to make this System Default active. Copy the report to the directory shown in the Value field. Use the Reports menu in Customer Portal to see the list of available custom reports.



To run the report, either double-click the report in the list (which defaults to creating a .PDF) or highlight a report and then select Print (creates .PDF) or Export (creates .CSV) using the down arrow next to the Print button. If additional information is required to run the report, a parameter screen will be displayed. Enter the parameters and select the Process.



Preview Report

Page: 1 of 1 Automatic Zoom

Turnaround Time Report									
Asset ID	Manufacturer	Model	Description	First	Last	Arrive	Ship	Turntime	
User Ruke5									
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Ruke5	2/3/1996 2:38:55 AM	2/5/1996 10:11:00 AM	2	
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Ruke5	4/29/1996 5:39:54 AM	5/1/1996 1:14:00 PM	2	
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	User	Ruke5	7/26/1996 4:40:53 AM	7/28/1996 12:15:00 PM	2	
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Ruke5	8/8/1996 5:31:27 AM	8/10/1996 1:05:00 PM	2	
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	User	Ruke5	8/9/1996 12:26:26 AM	8/11/1996 8:00:00 AM	2	
SAMPLE-8842	FLUKE	8842	DMM	User	Ruke5	8/12/1996 7:14:17 AM	8/14/1996 2:48:00 PM	2	

Advanced Formulas

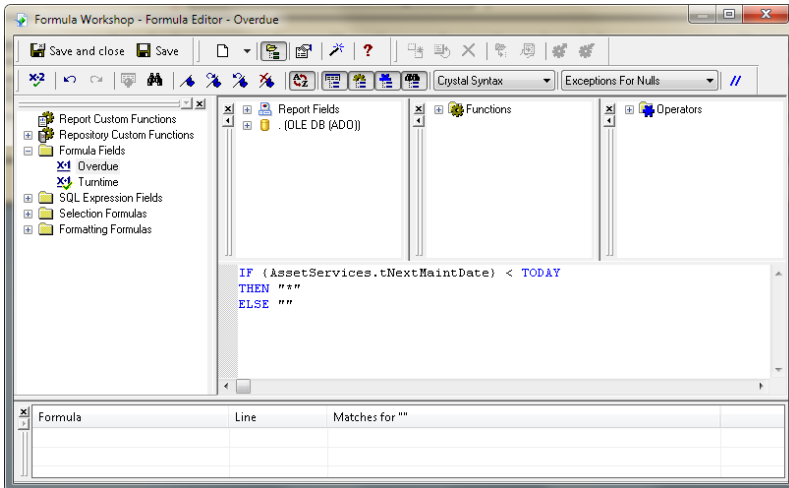
The Formula Editor

Formulas are used in Crystal Reports to provide selection criteria for the data and may be used as a named formula or as a record selection criterion. The Formula Editor is a dialog box that contains all the tools we need to create and validate formulas. We can:

- Assign a name to a formula
- Enter a formula
- Check it to make sure you have entered it correctly
- Accept it for use in the report

As one would expect, when the report is printed, Crystal Reports prints the results of the formula, not the formula itself.

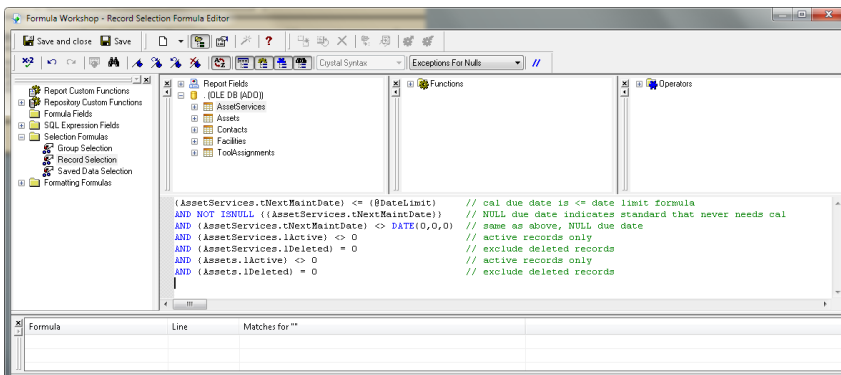
To open the formula editor, right-click on Formula Field in Field Explorer on the right hand side of the designer window and select New..., type a name for the formula (the example shows Overdue) and the formula editor opens.



The IF... THEN... ELSE... control structures are often found in formulas and allow for easy conditional evaluations. They can be typed in manually or entered from the Operators tree in the top-right window.

Formulas may also be used when creating selection criteria for obtaining the desired data. To do this, select Selection Formulas, Record on the Report menu.

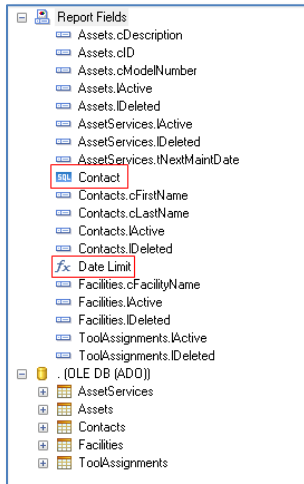
For Example:



Comments can be entered along with formulas. Enter a double forward slash before the commentary.

The Fields Box

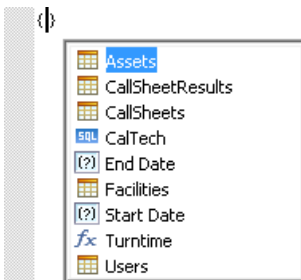
We can enter fields into formulas in two ways, by double-clicking an item in the list, or typing it in manually.



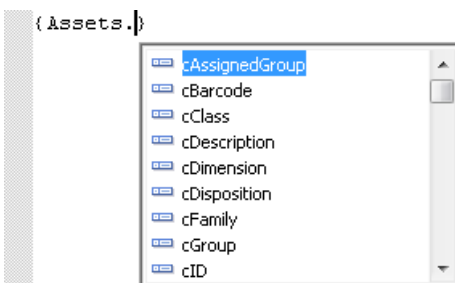
Under the Report Fields node, database fields, SQL Expression Fields and Formula Fields currently used in the report are listed in alphabetical order. SQL Expression Fields are symbolized by an “SQL” icon and Formula Fields by an “fx” icon.

Under the tree node named after the current report database connection, all tables currently on the report are listed. To add a field from one of the tables, expand the according table node and locate it.

When manually entering fields, start by typing an open curly brace which brings up a list of available tables as well as SQL Expression fields, parameters and formula fields. The closing curly brace will be inserted automatically as well.



Pressing the Enter key on one of the table items will automatically add a period to the end of the table name and produce a new pop-up, listing the fields in that table.



This guided process makes it easy to enter the desired field query correctly.

The syntax for entering different types of fields is as follows:

- {<table>.<field>}
- {?<parameter>}
- {%<SQL Expression field>}
- {@<formula field>}

```
{Assets.lActive}
{ ?End Date}
{%CalTech}
{@Turntime}
```

Operators and Functions Box

Likewise, operators and functions can be entered by double-clicking an item in the according list box, or by typing it in manually. Crystal Reports inserts the selected item into our formula, complete with any parentheses, brackets, or commas required.

Using dates in formulas

Crystal Reports includes many useful functions for including dates and date ranges in formulas.

The Formula Checker

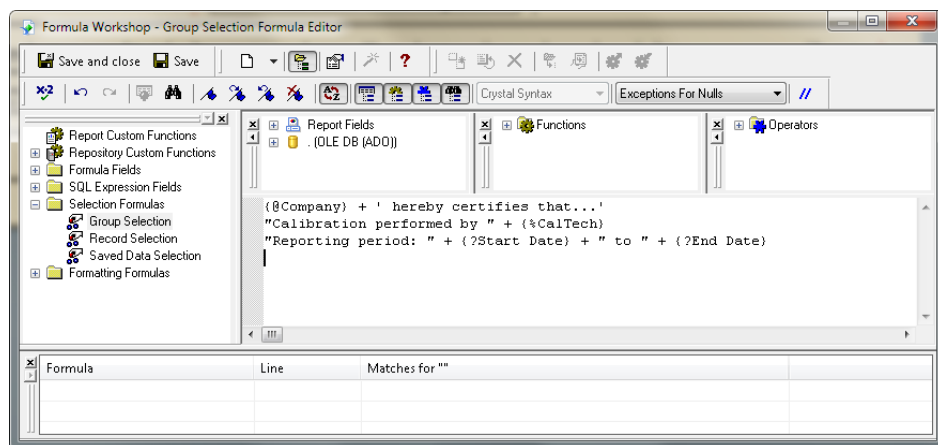
The Formula Editor also contains a formula checker which validates the syntax of the formula entered. To check the formula, click the X-2 button.

Inserting text and numbers into formulas

Text and numbers in formulas are entered manually.

- Text must be surrounded by 'single' or "double" quotation marks.
- Numbers must be entered without commas (1000000 not 1,000,000).

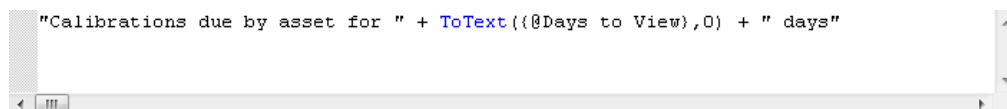
Examples:



Inserting functions and operators into formulas

Functions and operators can be inserted into formulas by double-clicking an item in the according list or by typing them in manually. Functions can be nested within other functions, i.e. the return value of the inner functions serves as the input to the outer function.

Example:



Stacking IF... ELSE... statements

The ELSE clause of an IF... ELSE... statement can contain yet another IF... ELSE... statement, allowing for elaborate decision trees. For example:

```
IF {CallSheets.tOpenDate} in Aged0T30Days
THEN "<30 Days" ELSE
IF {CallSheets.tOpenDate} in Aged31To60Days
THEN "31 to 60 Days" ELSE
IF {CallSheets.tOpenDate} in Aged61To90Days
THEN "61 to 90 Days"
```

Using Variables in formulas

You can assign a variable to a formula, by first defining the variable and then using it in a formula. For example, you may wish to assign a variable by the name of MonthEnd and assign it to the Calibration Due Date field. Note that the assignment <variable> := <value> must be terminated by a semi-colon.

```
DateVar MonthEnd:={AssetServices.tNextMaintDate};
IF MonthEnd < {@Upper Date Limit}
THEN "This Month"
ELSE ""
```

Variables may be used to keep a running total of summaries. For example:

```
WhilePrintingRecords;
NumberVar Cost := Cost + {Assets.nItemCost}
```

This will keep a running total of the cost information in the Asset item cost field. *WhilePrintingRecords* forces the report to evaluate the formula while printing the records.

Some MET/CAL Example Formulas

The following formulas are commonly used in record selection formulas.

Formula	Purpose
{Assets.lActive} <> 0	Only include active Assets
{AssetServices.tNextMaintDate} <= {@DateLimit}	Calibration due at or before limit defined in @DateLimit formula
IsNull({CallSheets.tMaintDate})	Test if cal date is null
{CallSheets.tMaintDate} = DATE(0,0,0)	Test if cal date is null
{Assets.cID} = {?Asset Number}	Filter Assets by Asset number entered via user prompt
LooksLike ({Assets.cModelNumber}, 'H?')	Include Assets whose model starts with H
{Assets.cDisposition} IN ['In Service', 'Out of Service', 'Lost', 'Scrapped'] OR ISNULL({Assets.cDisposition})	Filter Assets by disposition, based on an array of hard-coded values
{Assets.cModelNumber} in ['55?', '57?']	Filter Assets by model with wildcards
{AssetServices.tNextMaintDate} IN Next30Days	Will only print for due dates that fall within the next 30 days from today

Total Records Printed: +ToText (Count
({Assets.nAssetUID}),0)

Prints number of records

Print Date: +ToText (Today)+" at "+Now

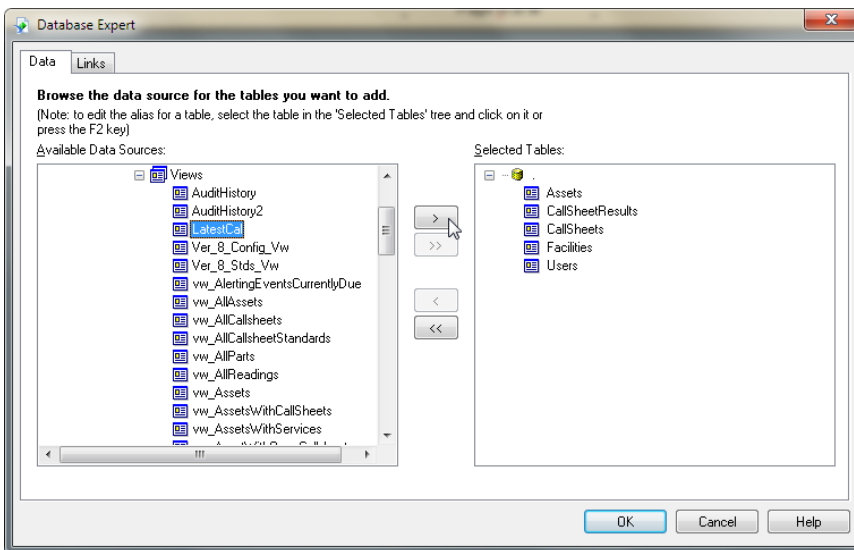
Prints the date and time on the report

Using database views

Some data is easier selected or filtered in SQL than by using elaborate formulas from within Crystal Reports. For example, to obtain the most recent calibration record for an Asset, the following SQL query can be employed. To use it from a report, it is best wrapped in a database view or stored procedure.

```
CREATE VIEW [dbo].[LatestCal]
AS
SELECT
    *
FROM
    CallSheets
WHERE
    tMaintDate =
    (
        SELECT
            MAX(tMaintDate)
        FROM
            CallSheets c
        WHERE
            c.lActive <> 0
        AND
            c.lDeleted = 0
        AND
            c.lClosed <> 0
        AND
            c.nAssetUID = CallSheets.nAssetUID
        GROUP BY
            c.nAssetUID
    )
GO
```

The view is then added to the report via the Database Expert, in the same fashion as adding tables to a report.



MET/TEAM ships with a number of canned database views, many of which will make report writing easier since the table JOINS are already embedded in them and fields like the customer or manufacturer for an Asset or its type information can be readily accessed as character fields.

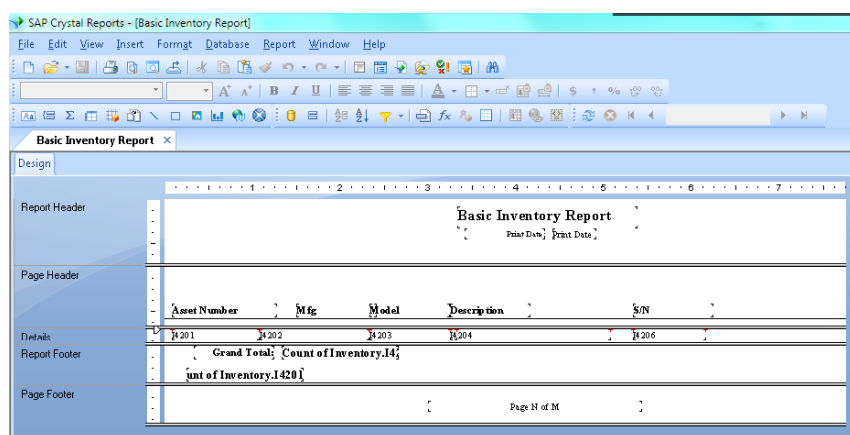
You are encouraged to explore the existing views as a starting point, in particular vw_CallSheets and vw_AssetsWithServices.

Converting a MET/BASE Report to MET/TEAM

Converting a MET/BASE report to MET/TEAM is accomplished by stepping through a series of steps as detailed below.

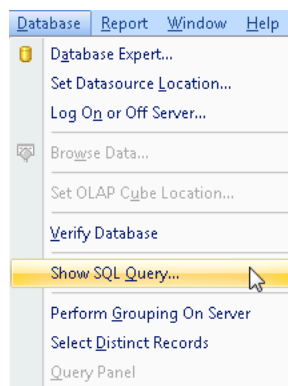
Open MET/BASE report

Begin by opening the report in SAP Crystal Reports.



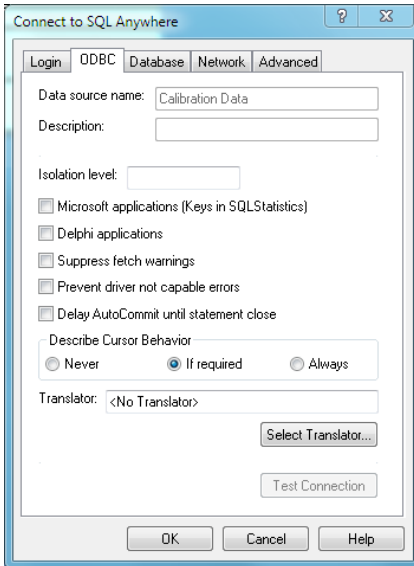
View Underlying SQL

The underlying SQL can be viewed from the Database menu.

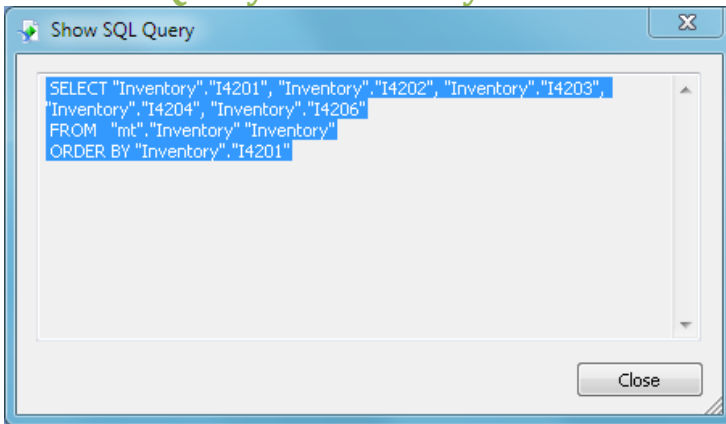


Connect to SQL Anywhere

Connect to SQL Anywhere using the ODBC tab.



View the Query and Identify the Needed Fields



List the Fields

"Inventory"."I4201"
 "Inventory"."I4202"
 "Inventory"."I4203"
 "Inventory"."I4204"
 "Inventory"."I4206"

Map the Fields to MET/TEAM

Get the titles of the metbase fields by running this query in iSQL:

```
SELECT * FROM ME2_Customiz WHERE fldnum IN ('4201','4202','4203','4204','4206')
```

Fldnum	title
4201	Asset Number
4202	Manuf.
4203	Model
4204	Description
4206	Serial Number

4201 - Asset Number

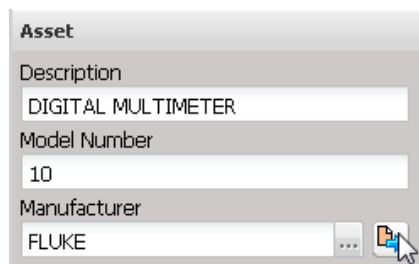
Locate the field on the Asset screen and determine the database column name.

The field in MET/TEAM is **Assets.cID**.

4202 – Manuf.

The field name for manufacturer is a reference to another database table, indicated by the name starting with n (numeric) and ending in UID (unique id).

Open the manufacturer screen using the Quick Link button.



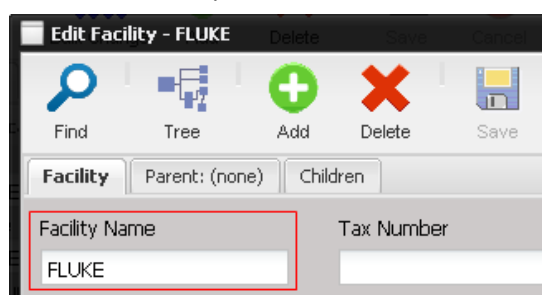
Asset

Description
DIGITAL MULTIMETER

Model Number
10

Manufacturer
FLUKE

It is a facility and what we really want to see on the report is the facility name of the manufacturer, not the *n...UID* reference that is part of the Asset table

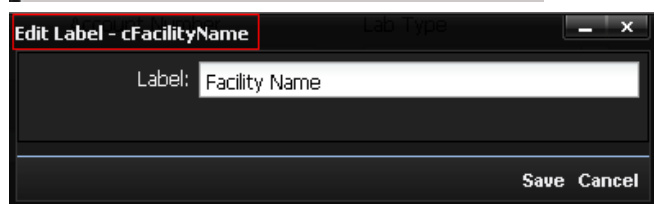


Edit Facility - FLUKE Delete Save Cancel

Find Tree Add Delete Save

Facility Parent: (none) Children

Facility Name Tax Number
FLUKE



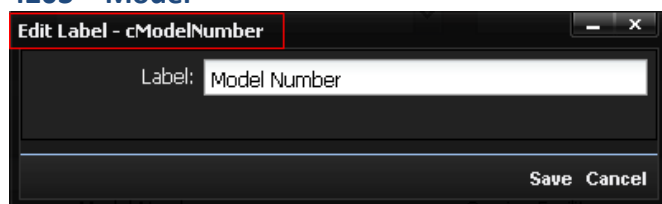
Edit Label - cFacilityName Lab Type

Label: Facility Name

Save Cancel

So, the field in MET/TEAM is **Facilities.cFacilityName** of the facility record referenced by nManufacturerUID on the Asset.

4203 – Model



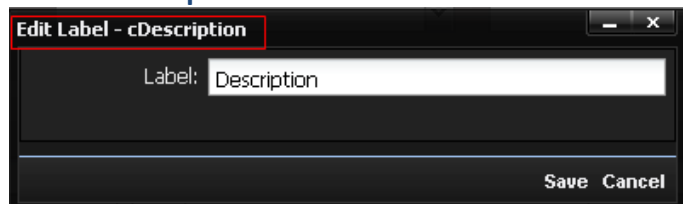
Edit Label - cModelNumber

Label: Model Number

Save Cancel

The field is called **Assets.cModelNumber**.

4204 – Description



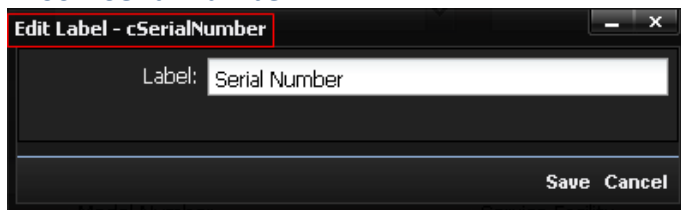
Edit Label - cDescription

Label: Description

Save Cancel

The field is called **Assets.cDescription**.

4206 – Serial Number



The field is called **Assets.cSerialNumber**.

Armed with this information, we can now build the MET/TEAM query, to get the equivalent information as was used in MET/BASE:

```
SELECT Assets.cID, Facilities.cFacilityName, Assets.cModelNumber,
       Assets.cDescription, Assets.cSerialNumber
FROM dbo.Assets Assets
JOIN dbo.Facilities Facilities
ON Facilities.nFacilityUID = Assets.nManufacturerUID
ORDER BY Assets.cID
```

Run New Query and Verify Results

Run the new query in SQL Server® Management Studio and verify the results show the expected data.

```
SELECT Assets.cID, Facilities.cFacilityName, Assets.cModelNumber,
       Assets.cDescription, Assets.cSerialNumber
FROM dbo.Assets Assets
JOIN dbo.Facilities Facilities
ON Facilities.nFacilityUID = Assets.nManufacturerUID
ORDER BY Assets.cID
```

	cID	cFacilityName	cModelNumber	cDescription	cSerialNumber
1	FLUKE CORPORATION	FLUKE	CALIBRATION	OUT SOURCED	NA
2	SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	10101010
3	SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	1100110001
4	SAMPLE-5500	FLUKE	5500A	CALIBRATOR	4820000
5	SAMPLE-5700	FLUKE	5700A	CALIBRATOR	57000001
6	SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	572500001
7	SAMPLE-732	FLUKE	732	DC REFERENCE STD	732000001
8	SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	742010001
9	SAMPLE-742-2	FLUKE	742-10K	10,000 OHM RESISTANCE STD	742100001
10	SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	87001001
11	SAMPLE-8842	FLUKE	8842	DMM	884200987
12	sample-block	HOKE	MIL026901	MECHANICAL STANDARD	048323242
13	sample-c2	vk	c2	mechanical standard	r4e90uys
14	SAMPLE-OPFLAT	HOKE	36	MECHANICAL STANDARD	8096098098

To make it easier to use in Crystal Reports, we can turn the query into a stored procedure, or a view. Furthermore, to make the information clearer, we can alias the column names to be more user friendly:

```
-- drop the view if it exists already
IF OBJECT_ID(N'[dbo].[view_basic_inventory_report]', 'V') IS NOT NULL
    DROP VIEW [dbo].[view_basic_inventory_report]
GO

-- create the view
CREATE VIEW
```

```

[dbo].[view_basic_inventory_report]
AS
SELECT
    Assets.cID AS [Asset Number],
    Facilities.cFacilityName AS [Manufacturer],
    Assets.cModelNumber AS [Model],
    Assets.cDescription AS [Description],
    Assets.cSerialNumber AS [Serial Number]
FROM
    dbo.Assets Assets
JOIN
    dbo.Facilities Facilities
ON
    Facilities.nFacilityUID = Assets.nManufacturerUID
GO

```

Run the script in SQL Server® Management Studio.

Test view in SQL Server® Management Studio

`SELECT * FROM dbo.view_basic_inventory_report ORDER BY 1`

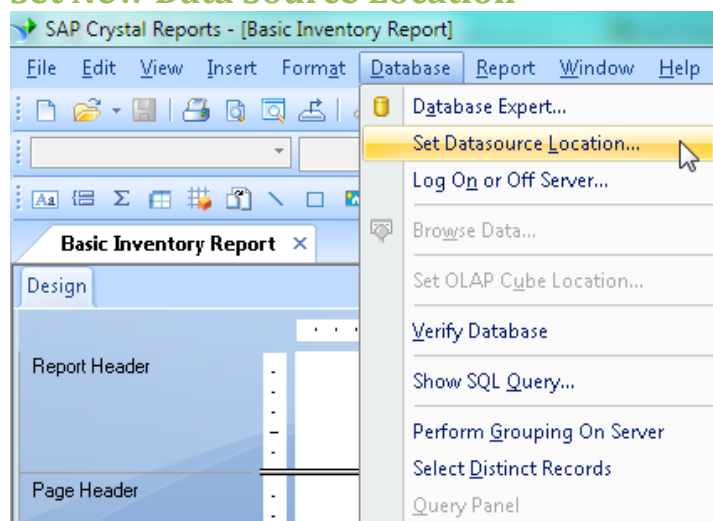
100 %

Results Messages

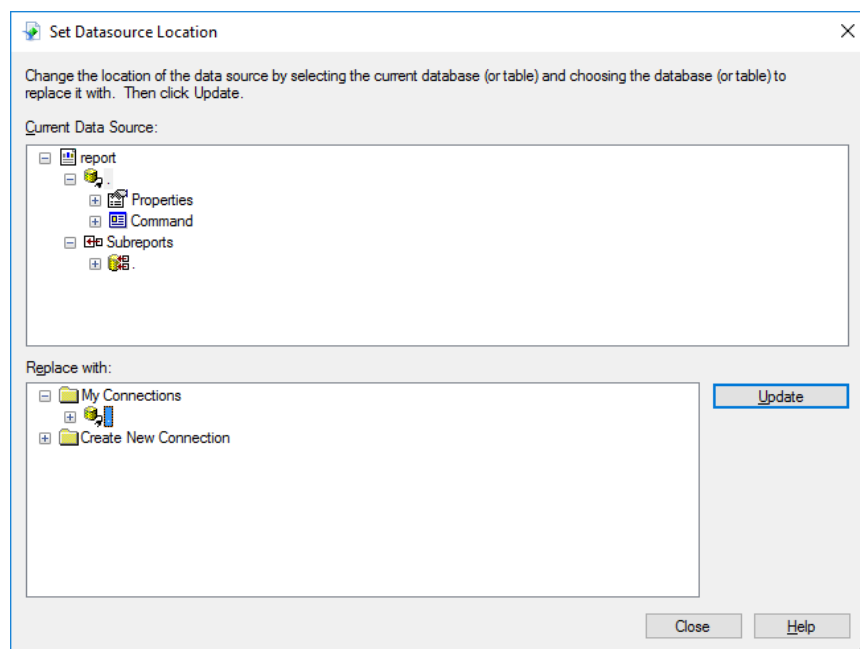
	Asset Number	Manufacturer	Model	Description	Serial Number
1	FLUKE CORPORATION	FLUKE	CALIBRATION	OUT SOURCED	NA
2	SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	10101010
3	SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	1100110001
4	SAMPLE-5500	FLUKE	5500A	CALIBRATOR	4820000
5	SAMPLE-5700	FLUKE	5700A	CALIBRATOR	570000001
6	SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	572500001
7	SAMPLE-732	FLUKE	732	DC REFERENCE STD	732000001
8	SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	742010001
9	SAMPLE-742-2	FLUKE	742-10K	10,000 OHM RESISTANCE STD	742100001
10	SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	87001001
11	SAMPLE-8842	FLUKE	8842	DMM	884200987
12	sample-block	HOKE	MIL026901	MECHANICAL STANDARD	048323242
13	sample-c2	vk	c2	mechanical standard	r4e90uys
14	SAMPLE-OPFLAT	HOKE	36	MECHANICAL STANDARD	8096098098

As is easy to see, the results are the same as the query results, but the column headers now reflect the aliased names for the database columns.

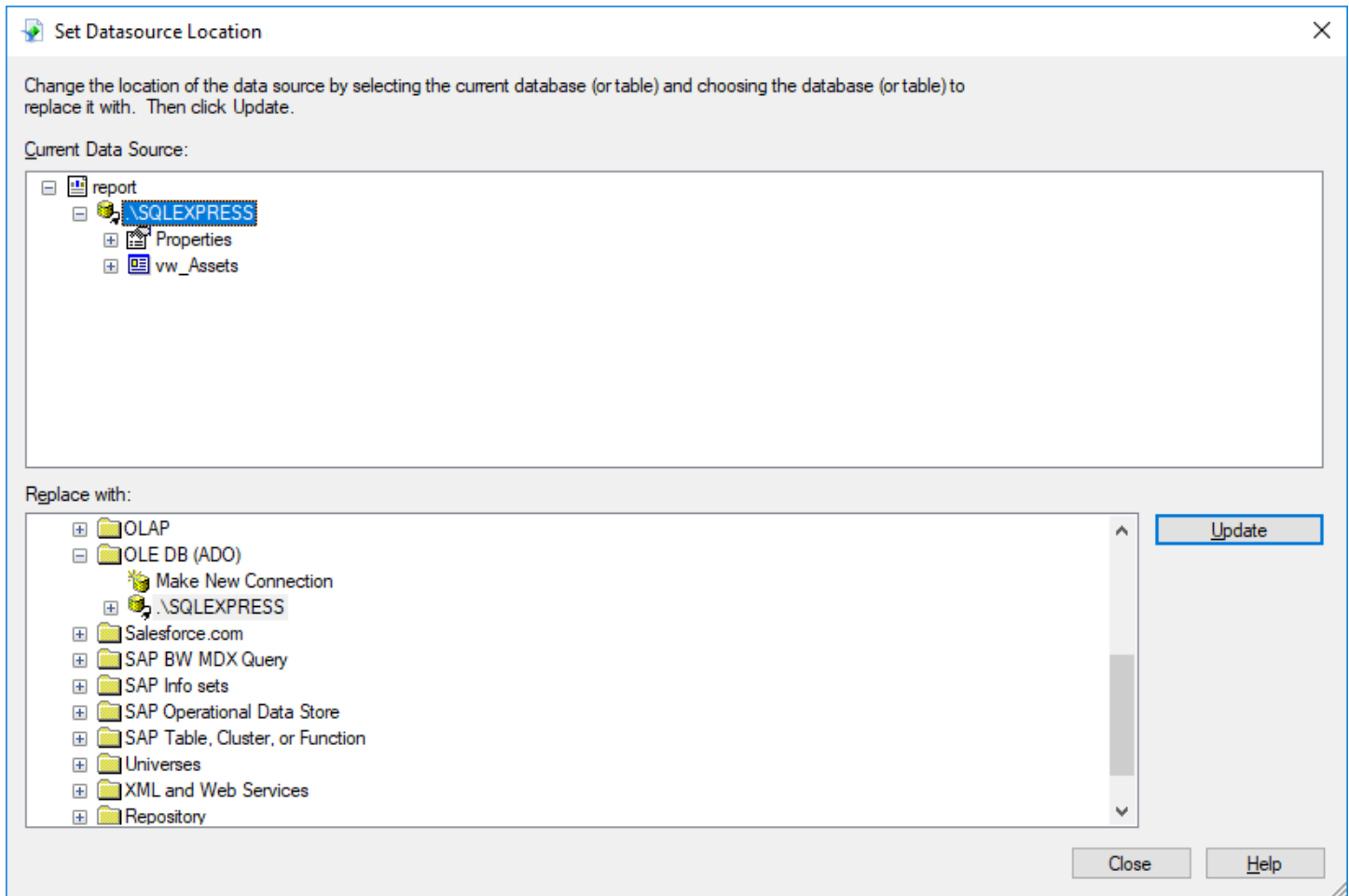
Set New Data Source Location



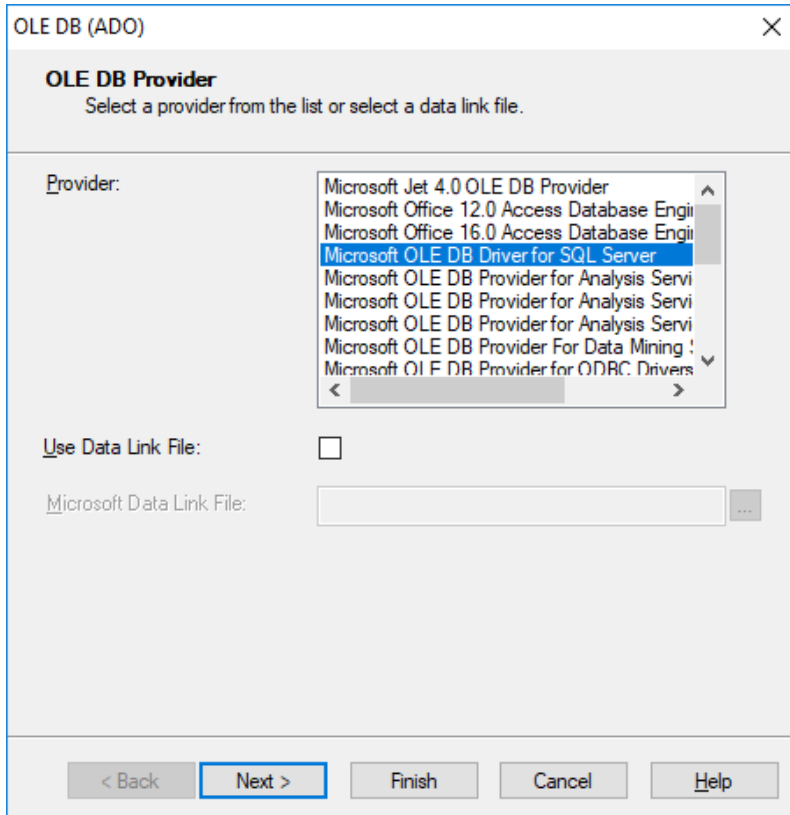
Expand the *Create New Connection* node



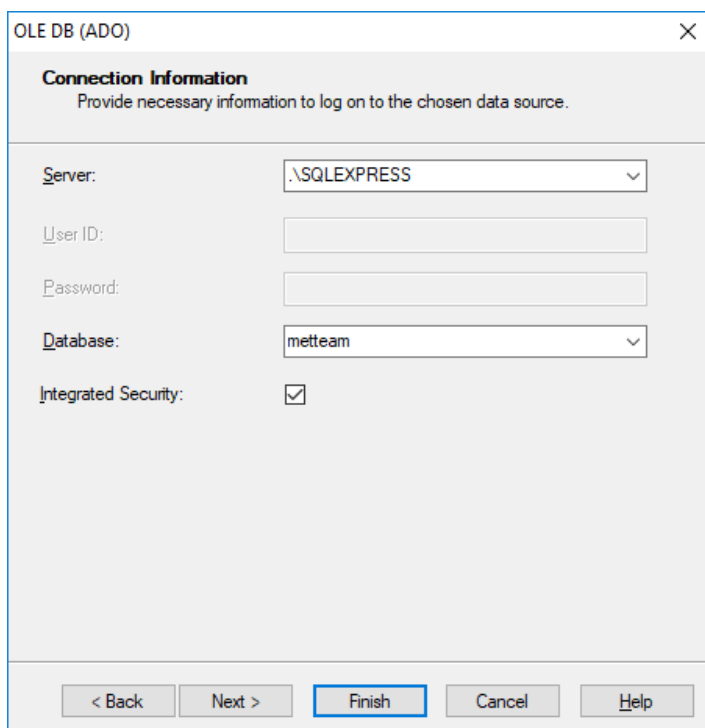
Locate OLE DB (ADO) and double-click *Make New Connection*.



Select the **Microsoft OLE DB Driver for SQL Server** in the **Provider** list and select *Next*.



Set your server in the server dropdown (a dot can be used to indicate the local server), Set METTEAM in the database dropdown and enter your credentials, then press Finish. Optionally, you can connect by selecting the Integrated Security checkbox. No user ID or password is required with this option, but it does require that Database Authentication is enabled on the server.



OLE DB (ADO)

Connection Information
Provide necessary information to log on to the chosen data source.

Server: .\SQLEXPRESS

User ID:

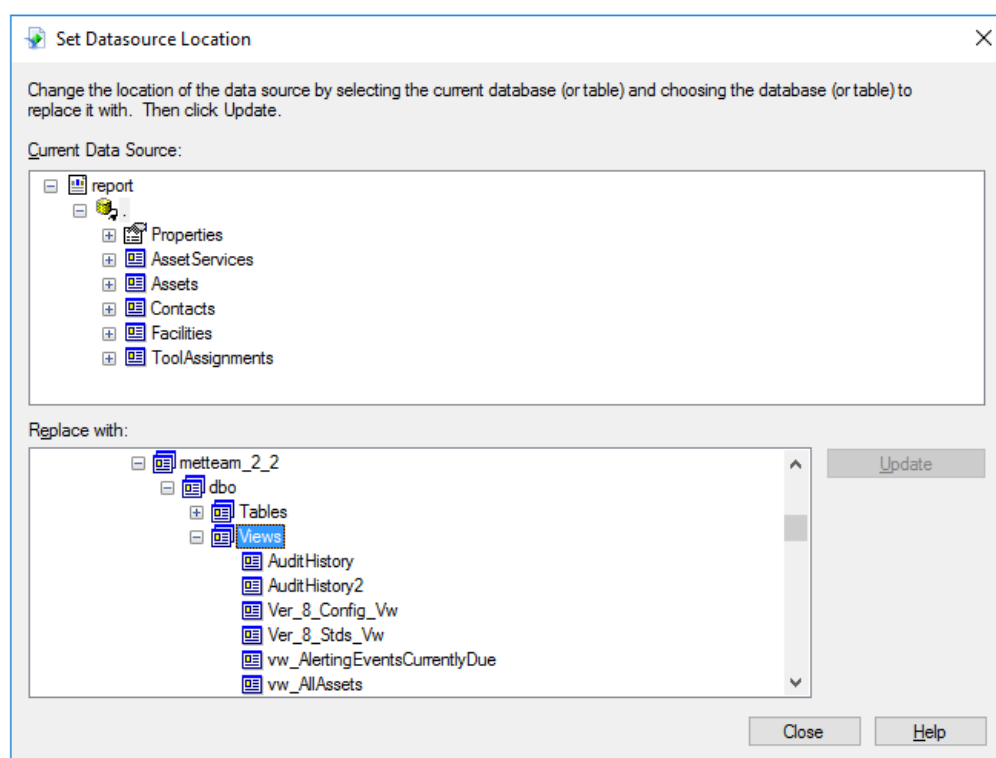
Password:

Database: metteam

Integrated Security: ☒

< Back Next > **Finish** Cancel Help

Now the newly added connection is available for use.



Set Datasource Location

Change the location of the data source by selecting the current database (or table) and choosing the database (or table) to replace it with. Then click Update.

Current Data Source:

- report
 - Properties
 - AssetServices
 - Assets
 - Contacts
 - Facilities
 - ToolAssignments

Replace with:

- metteam_2_2
 - dbo
 - Tables
 - Views
 - AuditHistory
 - AuditHistory2
 - Ver_8_Config_Vw
 - Ver_8_Std_Vw
 - vw_AlertingEventsCurrentlyDue
 - vw_AllAssets

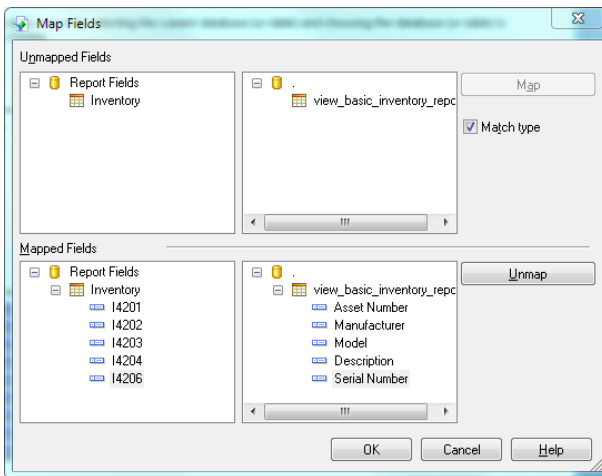
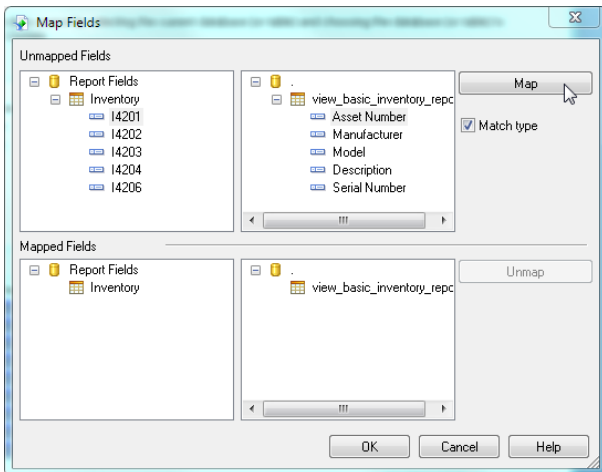
Update

Close Help

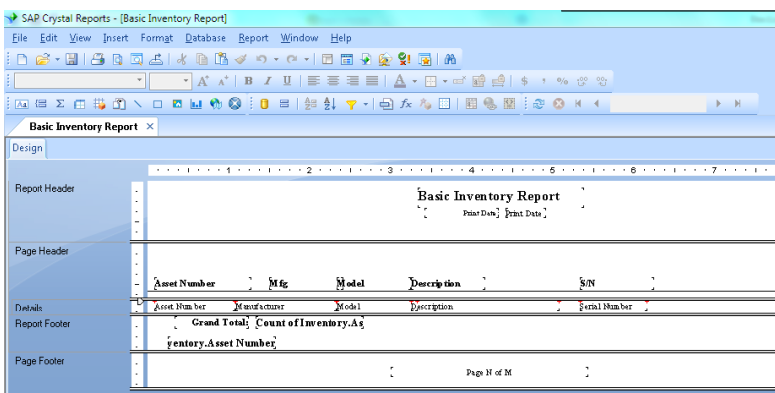
After pressing Update, the fields can be re-mapped.

Map Fields

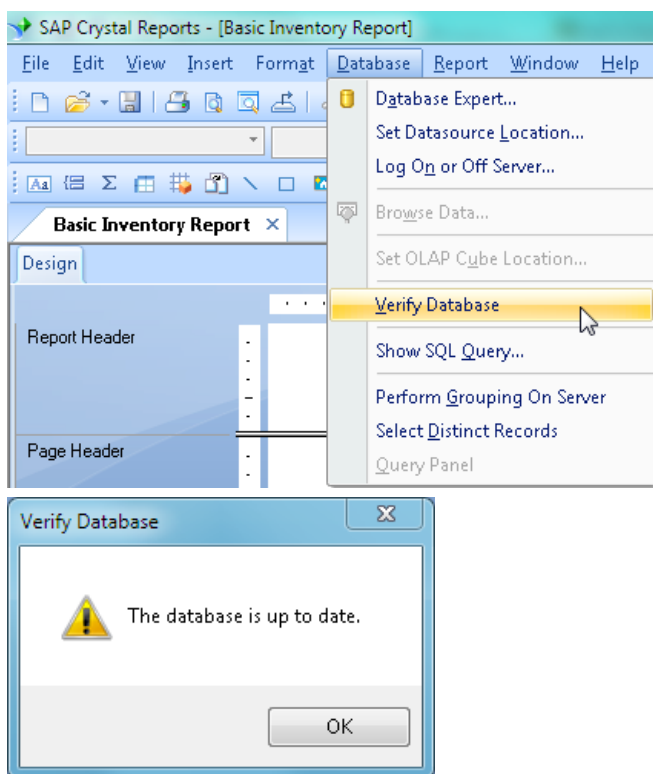
Map the fields one by one, until there are all fields are mapped.



The field names on the report reflect the aliased fields of the MET/TEAM view.

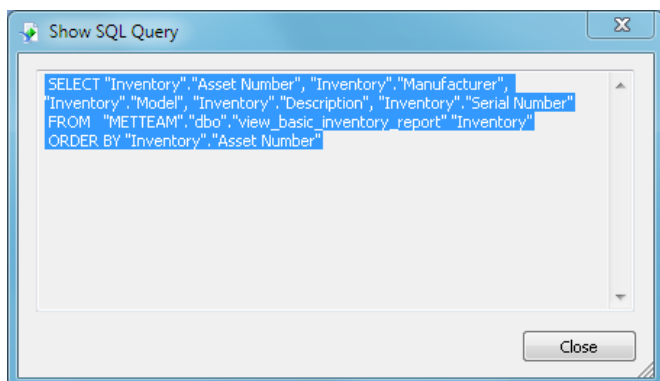


After switching data sources, we need to verify that the data can be queried successfully.



View New Query

Use the Show SQL Query option to view the new query.



Run New Report

When the new report is run, the basic inventory list in MET/TEAM is displayed.

Basic Inventory Report

Print Date : 4/19/2013

Asset Number	Mfg	Model	Description	S/N
FLUKE CORPORATION	FLUKE	CALIBRATION	OUT SOURCED	NA
SAMPLE-10	FLUKE	10	DIGITAL MULTIMETER	10101010
SAMPLE-11	FLUKE	11	DIGITAL MULTIMETER	1100110001
SAMPLE-5500	FLUKE	5500A	CALIBRATOR	4820000
SAMPLE-5700	FLUKE	5700A	CALIBRATOR	57000001
SAMPLE-5725	FLUKE	5725A	BOOST AMPLIFIER	572500001
SAMPLE-732	FLUKE	732	DC REFERENCE STD	732000001
SAMPLE-742-1	FLUKE	742-1	1 OHM RESISTANCE STD	742010001
SAMPLE-742-2	FLUKE	742-10K	10,000 OHM RESISTANCE STD	742100001
SAMPLE-87	FLUKE	87	DIGITAL MULTIMETER	87001001
SAMPLE-8842	FLUKE	8842	DMM	884200987
sample-block	HOKE	MIL026901	MECHANICAL STANDARD	048323242
sample-c2	vk	c2	mechanical standard	r4e90uys
SAMPLE-OPFLAT	HOKE	36	MECHANICAL STANDARD	8096098098

Grand Total: 14

14

File Menu

The File menu contains the options for logging out of the MET/TEAM application and for checking out or in for the purpose of going off site.

Import

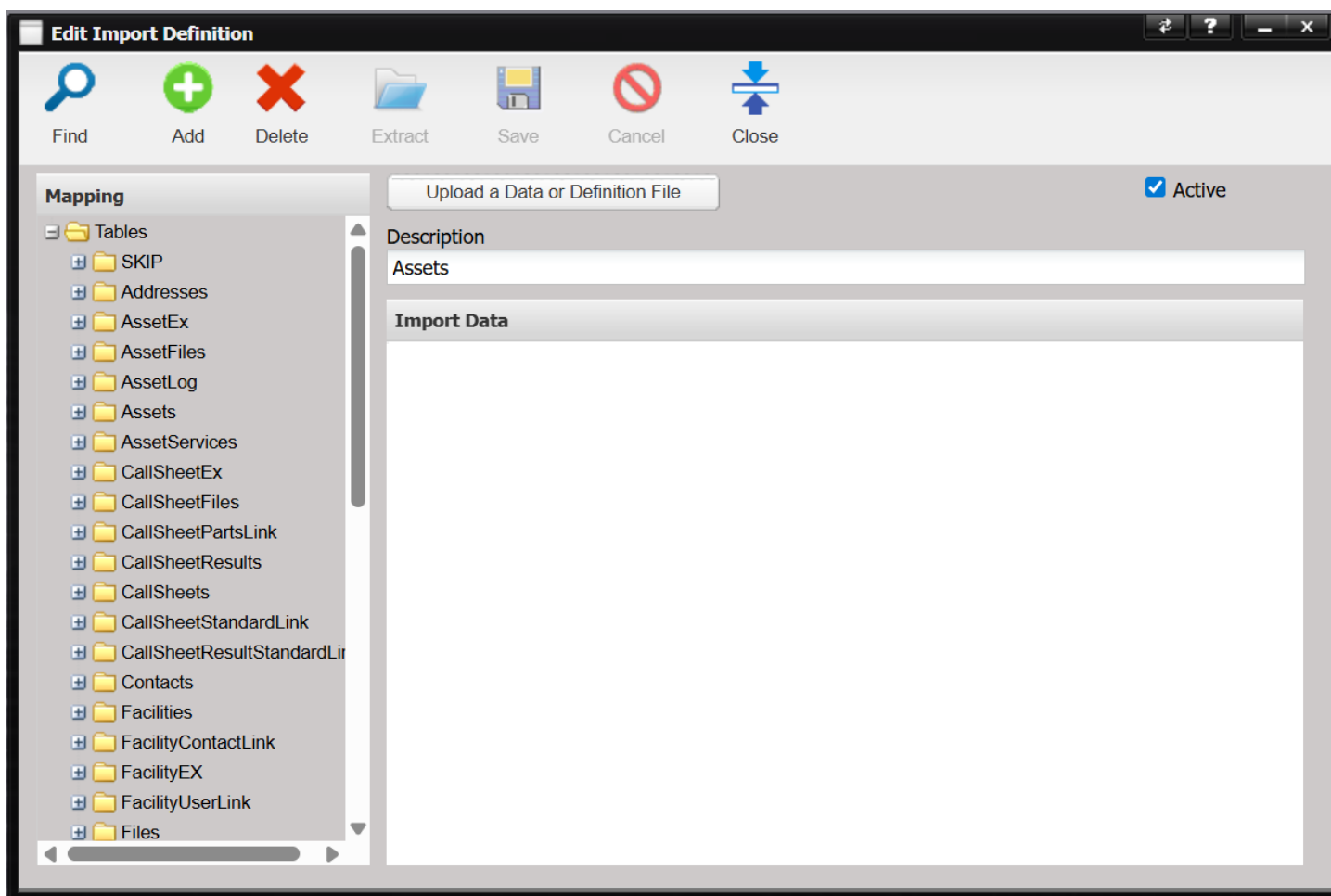
The Import menu allows for creating an import definition, creating an import setup, and processing the import. To begin the import process, create an import definition and then an import setup.

Note: The log file that tracks the processes and data imported is in English only, except for some error or warning messages.

Import Definition

The Import Definition allows for uploading a data or definition file to assist in assigning columns. The purpose of the definition is to assign columns to MET/TEAM table fields.

Note: MET/TRACK users can also upload a definition file used with imp2.exe or Data Importation. While the fields are recognized and translated, any import tied to assets requires manual augmentation since MET/TEAM requires the type's manufacturer, model, and description.



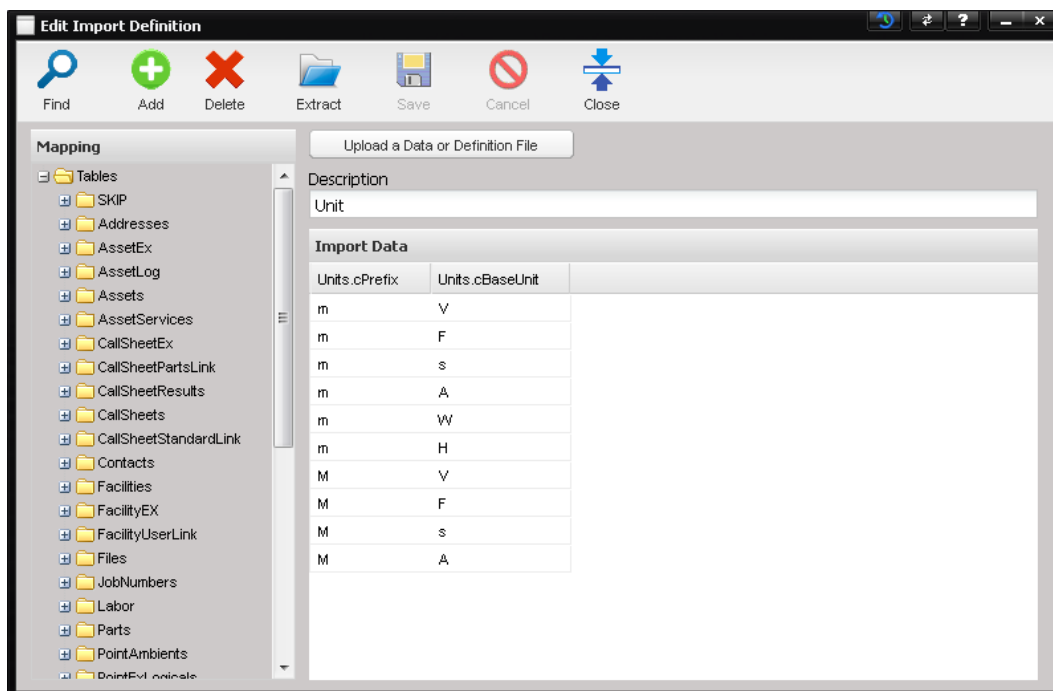
- **Mapping** – Lists the MET/TEAM tables that can be mapped to and the fields within the tables. Press the “+” to expand the list of tables and fields underneath each table.
- **Description** – The description for this import definition.
- **Import Data** – Displays the columns and assigned fields.

When the Upload a Data or Definition File button is selected, the Select a Data or Definition File... screen is displayed prompting the user to navigate to the file.

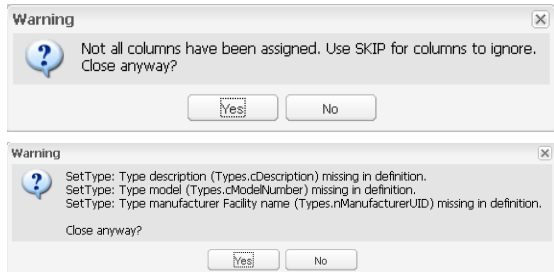


Assign fields to the columns by selecting the column in the grid and clicking a field in the tree.

Note: When assigning a field that is defined in the default MET/TEAM database configuration as a drop-down list, the values in the associated column of the source data file must contain either the English value or the corresponding value in the current locale/language. Drop-down list values are always stored in the database in English and are translated as needed for the user interface. For fields that are not defined as drop-down lists in the default MET/TEAM database configuration but have been customized to become drop-down lists, values will be imported and stored in the database as defined in the source data file – no translation to equivalent English values will be attempted.



Repeat the process until all columns are assigned. To ignore a column of data, select the SKIP item from the SKIP node in the tree (shown as SKIP.SKIP on the header). The definitions are validated upon exiting the form, with a warning if the definition isn't valid.



SKIP and fields in Addresses and CallSheetStandardLink tables can be selected more than once; other fields disappear from the selection tree once selected.

If the same data is needed for more than one MET/TEAM field, the data should be replicated (copy the column) so it can be assigned to additional fields. For example, an Asset's manufacturer, model, and Type description usually match that of its Type. While the Type fields are required, the Assets are not. To import the same information into both, copy the three data columns and assign one set to the Type fields and the other to the Asset fields.

Importing Digital Signatures

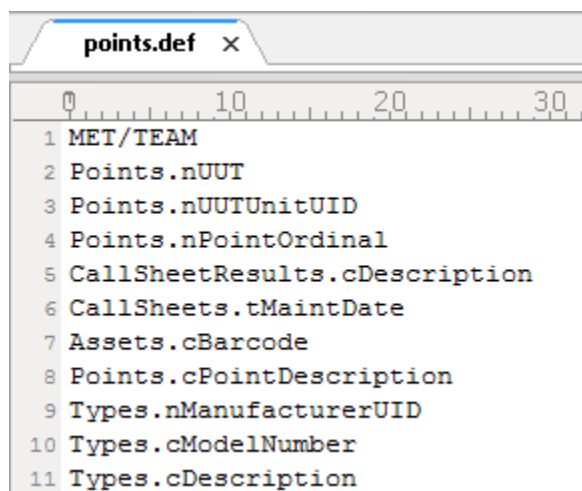
When creating a definition to import data for Work Orders (CallSheets), there are some special considerations and specific rules regarding the fields for digital signatures (nTechnicianApprovedByUID, nQCApprovedByUID, tTechnicianApprovedDate and tQCApprovedDate) that you need to be aware of.

- If the Import Definition and data contain only Technician signature information...
 - o Work Orders created during import will still need to have the QC signature applied after the import. This can be done one by one or using Batch Change.

- Existing Work Orders that are updated during import will have the Technician signature added or replaced as needed and the QC signature will be removed (the log file will indicate if a signature has been replaced or removed)
- If the Import Definition and data contain only QC signature information...
 - Work Orders created during import will not have any signatures because the Technician signature is required before a QC signature can be added (the log file will indicate the signature was not applied).
 - Existing Work Orders that do not have a Technician signature already will be handled the same as new Work Orders.
 - Existing Work Orders that have a Technician signature already will have the QC signature applied.
- If the Import Definition and data contain both Technician and QC signature information...
 - Work Orders created during import will have both the Technician and the QC signatures applied.
 - Existing Work Orders that have no signatures will have both the Technician and the QC signatures applied.
 - Existing Work Orders that have one or both signatures will have both the Technician and the QC signatures applied (the log file will indicate if a signature has been replaced).

Extracting an Import Definition

Extracting means saving the import definition to a file on the local hard drive. To extract the current definitions, press the blue Extract button on the toolbar. The file extracted can be uploaded into the same or another MET/TEAM system to make an import definition from it. The file format is similar to that of the definition files used in MET/TRACK.



```

1 MET/TEAM
2 Points.nUUT
3 Points.nUUTUnitUID
4 Points.nPointOrdinal
5 CallSheetResults.cDescription
6 CallSheets.tMaintDate
7 Assets.cBarcode
8 Points.cPointDescription
9 Types.nManufacturerUID
10 Types.cModelNumber
11 Types.cDescription
  
```

Note: When upgrading to a new version of MET/TEAM, prior import definitions will have to be re-validated, as changes to the business logic may invalidate the prior definition.

Referencing Items in Other Tables

Linking data between tables in MET/TEAM is often done via the UID of the other record. To establish a link between tables during the import, for example to specify the manufacturer for an Asset to be imported, the Assets.nManufacturerUID column should be added to the definition. The data for Assets.nManufacturerUID should be the actual facility name of the manufacturer, not the reference number normally stored in nManufacturerUID.

In order to establish the link, the referenced item has to be located or created. In order to do so, all fields that uniquely identify the referenced item have to be specified within that one column of data in the import data file. In case two fields are needed to uniquely identify the referenced record, the data elements are separated by a double-colon (::). This

method is currently employed when referencing Units and Service Types. If the data column does not contain a double-colon, the second part of the data is defaulted. The unit prefix defaults to *no prefix*, the service mode (ServiceTypes.cServiceType) defaults to *Calibration*.

Specific Table Fields

Addresses.nFacilityUID	Facilities.cFacilityName
AssetServices.nServiceTypeUID	ServiceTypes.cServiceName::ServiceTypes.cServiceType
Assets.nAssignedFacUID	Facilities.cFacilityName
Assets.nAuthorizedFacUID	Facilities.cFacilityName
Assets.nCategoryUID	Category.cDescription
Assets.nDepartmentUID	Facilities.cFacilityName
Assets.nFacilityUID	Facilities.cFacilityName
Assets.nInventoryByUID	Users.cUsername
Assets.nMaintenanceFacUID	Facilities.cFacilityName
Assets.nManufacturerUID	Facilities.cFacilityName
Assets.nParentUID	Assets.cBarcode
Assets.nSubCategoryUID	SubCategory.cDescription
CallSheetStandardLink.nAssetUID	Assets.cBarcode
CallSheetPartsLink.nJobNumberUID	JobNumbers.cJobOrderNumber
CallSheetResults.nProcedureUID	Procedures.cProcedureName
CallSheetResults.nRunAtFacilityUID	Facilities.cFacilityName
CallSheetResults.nTechnicianUID	Users.cUsername
CallSheets.nAssignedTechUID	Users.cUsername
CallSheets.nCategoryUID	Category.cDescription
CallSheets.nDepartmentUID	Facilities.cFacilityName
CallSheets.nInvoiceUID	Invoices.cInvoiceNo
CallSheets.nJobNumberUID	JobNumbers.cJobOrderNumber
CallSheets.nProcedureUID	Procedures.cProcedureName
CallSheets.nTechnicianApprovedByUID	Users.cUsername
CallSheets.nQCApprovedByUID	Users.cUsername
CallSheets.nReturnedByUID	Users.cUsername
CallSheets.nSubCategoryUID	SubCategory.cDescription
CallSheets.nSubContractorUID	Facilities.cFacilityName
CallSheets.nTechnicianUID	Users.cUsername
CallSheets.nWorkingFacilityUID	Facilities.cFacilityName
Contacts.nManagerUID	Contacts.cEmail2
Contacts.nUserUID	Users.cUsername
Facilities.nCategoryUID	Category.cDescription
Facilities.nParentFacilityUID	Facilities.cFacilityName
Facilities.nSubCategoryUID	SubCategory.cDescription
JobNumbers.nFundingAuthorityUID	Facilities.cFacilityName
Labor.nCategoryUID	Category.cDescription
Labor.nJobNumberUID	JobNumbers.cJobOrderNumber

Labor.nSubCategoryUID	SubCategory.cDescription
Labor.nUserUID	Users.cUsername
ManualTemplateRows.nNominalUnitUID	Units.cPrefix::Units.cBaseUnit
ManualTemplateRows.nRefUnitUID	Units.cPrefix::Units.cBaseUnit
Parts.nCategoryUID	Category.cDescription
Parts.nInventoryByUID	Users.cUsername
Parts.nManufacturerUID	Facilities.cFacilityName
PointAmbients.nAmbientHumidityUnitUID	Units.cPrefix::Units.cBaseUnit
PointAmbients.nAmbientPressureUnitUID	Units.cPrefix::Units.cBaseUnit
PointAmbients.nAmbientTemperatureUnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField001UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField002UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField003UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField004UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField005UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField006UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField007UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField008UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField009UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField010UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField011UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField012UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField013UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField014UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField015UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField016UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField017UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField018UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField019UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField020UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField021UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField022UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField023UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField024UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField025UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField026UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField027UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField028UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField029UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField030UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField031UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField032UnitUID	Units.cPrefix::Units.cBaseUnit

PointExNumerics.nField033UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField034UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField035UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField036UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField037UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField038UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField039UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField040UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField041UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField042UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField043UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField044UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField045UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField046UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField047UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField048UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField049UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField050UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField051UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField052UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField053UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField054UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField055UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField056UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField057UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField058UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField059UnitUID	Units.cPrefix::Units.cBaseUnit
PointExNumerics.nField060UnitUID	Units.cPrefix::Units.cBaseUnit
PointReadings.nAssetUID	Assets.cBarcode
PointReadings.nReadingUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nCardinalPointUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nCorrectionUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nReferenceUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nSystemAccuracyUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nUUTRangeUnitUID	Units.cPrefix::Units.cBaseUnit
Points.nUUTUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nMaximumReferenceUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nMaximumUUTUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nMinimumReferenceUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nMinimumUUTUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nReference2StandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit

PointStatistics.nReferenceRaw2StandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nReferenceRawStandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nReferenceStandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nSampleRateUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nUUTRawStandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit
PointStatistics.nUUTStandardDeviationUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nErrorUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nReferenceToleranceUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nToleranceErrorUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nToleranceNegativeUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nTolerancePositiveUnitUID	Units.cPrefix::Units.cBaseUnit
PointTolerances.nToleranceUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nGuardBandLowerUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nGuardBandUpperUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nLowerLimitUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nModifier1UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nModifier2UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nS1UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nS2UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyDominantUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyExpandedUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter10UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter1UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter2UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter3UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter4UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter5UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter6UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter7UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter8UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyParameter9UnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyStandardUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUncertaintyUnitUID	Units.cPrefix::Units.cBaseUnit
PointUncertainties.nUpperLimitUnitUID	Units.cPrefix::Units.cBaseUnit
Procedures.nApprovedByUID	Users.cUsername
Procedures.nAttTemplateUID	Files.cFileName
Procedures.nCategoryUID	Category.cDescription
Procedures.nProcedureFileUID	Files.cFileName
ToolAssignments.nContactUID	Contacts.cEmail2

TypeProcedureDefaults.nAttTemplateUID
Types.nCategoryUID
Types.nManufacturerUID
Types.nSubCategoryUID
Users.nManagerUID

Files.cFileName
Category.cDescription
Facilities.cFacilityName
SubCategory.cDescription

UIDs that Should not be Assigned

<any>.nAddFacilityUID
<any>.nAddUserUID
<any>.nUpdateFacilityUID
<any>.nUpdateUserUID
<any>.nImportUID
Addresses.nAddressUID
AssetEx.nAssetExUID
AssetEx.nAssetUID
AssetFiles.nAssetUID
AssetFiles.nAssetFileUID
AssetFiles.nFileUID
AssetLog.nAssetLogUID
AssetLog.nAssetUID
Assets.nAssetUID
Assets.nTypeUID
AssetServices.nAssetServiceUID
AssetServices.nAssetUID
CallSheetEx.nCallSheetExUID
CallSheetEx.nCallSheetUID
CallSheetFiles.nCallSheetUID
CallSheetFiles.nCallSheetFileUID
CallSheetFiles.nFileUID
CallSheetPartsLink.nCallSheetPartLinkUID
CallSheetPartsLink.nCallSheetUID
CallSheetPartsLink.nPartUID
CallSheetResults.nCallSheetResultUID
CallSheetResults.nCallSheetUID
CallSheets.nAssetUID
CallSheets.nCalendarUID
CallSheets.nCallSheetAttributeUID
CallSheets.nCallSheetUID
CallSheets.nGroupUID
CallSheets.nTypeProcedureDefaultUID
CallSheets.nTypeUID
CallSheetStandardLink.nCallSheetStandardLinkUID
CallSheetStandardLink.nCallSheetUID
CallSheetStandardLink.nLastStandardCallSheetUID
Contacts.nContactUID
Facilities.nFacilityUID
FacilityContactLink.nContactUID

FacilityContactLink.nFacilityContactLinkUID
 FacilityContactLink.nFacilityUID
 FacilityEX.nFacilityEXUID
 FacilityEX.nFacilityUID
 FacilityUserLink.nFacilityUID
 FacilityUserLink.nFacilityUserLinkUID
 FacilityUserLink.nUserUID
 Files.nFileUID
 Files.nManualTemplateUID
 Formats.nFormatUID
 JobNumbers.nJobnumberUID
 JobNumbers.nProjectUID
 Labor.nCallSheetUID
 Labor.nLaborUID
 ManualTemplateRows.nManualTemplateRowUID
 ManualTemplateRows.nManualTemplateUID
 ManualTemplates.nManualTemplateUID
 Parts.nPartUID
 PointAmbients.nAmbientHumidityFormatUID
 PointAmbients.nAmbientPressureFormatUID
 PointAmbients.nAmbientTemperatureFormatUID
 PointAmbients.nPointAmbientUID
 PointAmbients.nPointUID
 PointExLogicals.nPointExLogicalUID
 PointExLogicals.nPointUID
 PointExNumerics.nField001FormatUID
 PointExNumerics.nField002FormatUID
 PointExNumerics.nField003FormatUID
 PointExNumerics.nField004FormatUID
 PointExNumerics.nField005FormatUID
 PointExNumerics.nField006FormatUID
 PointExNumerics.nField007FormatUID
 PointExNumerics.nField008FormatUID
 PointExNumerics.nField009FormatUID
 PointExNumerics.nField010FormatUID
 PointExNumerics.nField011FormatUID
 PointExNumerics.nField012FormatUID
 PointExNumerics.nField013FormatUID
 PointExNumerics.nField014FormatUID
 PointExNumerics.nField015FormatUID
 PointExNumerics.nField016FormatUID
 PointExNumerics.nField017FormatUID
 PointExNumerics.nField018FormatUID
 PointExNumerics.nField019FormatUID
 PointExNumerics.nField020FormatUID
 PointExNumerics.nField021FormatUID
 PointExNumerics.nField022FormatUID

PointExNumerics.nField023FormatUID
 PointExNumerics.nField024FormatUID
 PointExNumerics.nField025FormatUID
 PointExNumerics.nField026FormatUID
 PointExNumerics.nField027FormatUID
 PointExNumerics.nField028FormatUID
 PointExNumerics.nField029FormatUID
 PointExNumerics.nField030FormatUID
 PointExNumerics.nField031FormatUID
 PointExNumerics.nField032FormatUID
 PointExNumerics.nField033FormatUID
 PointExNumerics.nField034FormatUID
 PointExNumerics.nField035FormatUID
 PointExNumerics.nField036FormatUID
 PointExNumerics.nField037FormatUID
 PointExNumerics.nField038FormatUID
 PointExNumerics.nField039FormatUID
 PointExNumerics.nField040FormatUID
 PointExNumerics.nField041FormatUID
 PointExNumerics.nField042FormatUID
 PointExNumerics.nField043FormatUID
 PointExNumerics.nField044FormatUID
 PointExNumerics.nField045FormatUID
 PointExNumerics.nField046FormatUID
 PointExNumerics.nField047FormatUID
 PointExNumerics.nField048FormatUID
 PointExNumerics.nField049FormatUID
 PointExNumerics.nField050FormatUID
 PointExNumerics.nField051FormatUID
 PointExNumerics.nField052FormatUID
 PointExNumerics.nField053FormatUID
 PointExNumerics.nField054FormatUID
 PointExNumerics.nField055FormatUID
 PointExNumerics.nField056FormatUID
 PointExNumerics.nField057FormatUID
 PointExNumerics.nField058FormatUID
 PointExNumerics.nField059FormatUID
 PointExNumerics.nField060FormatUID
 PointExNumerics.nPointExNumericUID
 PointExNumerics.nPointUID
 PointExStrings.nPointExStringUID
 PointExStrings.nPointUID
 PointReadings.nPointReadingUID
 PointReadings.nPointUID
 PointReadings.nReadingFormatUID
 Points.nCallSheetResultUID
 Points.nCardinalPointFormatUID

Points.nCorrectionFormatUID
 Points.nManualTemplateRowUID
 Points.nPointUID
 Points.nReferenceFormatUID
 Points.nSystemAccuracyFormatUID
 Points.nTemplateItemUID
 Points.nUUTFormatUID
 Points.nUUTRangeFormatUID
 PointStandardReadings.nReadingFormatUID
 PointStatistics.nMaximumReferenceFormatUID
 PointStatistics.nMaximumUUTFormatUID
 PointStatistics.nMinimumReferenceFormatUID
 PointStatistics.nMinimumUUTFormatUID
 PointStatistics.nPointStatisticUID
 PointStatistics.nPointUID
 PointStatistics.nReference2StandardDeviationFormatUID
 PointStatistics.nReferenceRaw2StandardDeviationFormatUID
 PointStatistics.nReferenceRawStandardDeviationFormatUID
 PointStatistics.nReferenceStandardDeviationFormatUID
 PointStatistics.nSampleRateFormatUID
 PointStatistics.nUUTRawStandardDeviationFormatUID
 PointStatistics.nUUTStandardDeviationFormatUID
 PointTolerances.nErrorFormatUID
 PointTolerances.nPointToleranceUID
 PointTolerances.nPointUID
 PointTolerances.nReferenceToleranceFormatUID
 PointTolerances.nToleranceErrorFormatUID
 PointTolerances.nToleranceFormatUID
 PointTolerances.nToleranceNegativeFormatUID
 PointTolerances.nTolerancePositiveFormatUID
 PointUncertainties.nGuardBandLowerFormatUID
 PointUncertainties.nGuardBandUpperFormatUID
 PointUncertainties.nLowerLimitFormatUID
 PointUncertainties.nModifier1FormatUID
 PointUncertainties.nModifier2FormatUID
 PointUncertainties.nPointUID
 PointUncertainties.nPointUncertaintyUID
 PointUncertainties.nS1FormatUID
 PointUncertainties.nS2FormatUID
 PointUncertainties.nUncertaintyDominantFormatUID
 PointUncertainties.nUncertaintyExpandedFormatUID
 PointUncertainties.nUncertaintyFormatUID
 PointUncertainties.nUncertaintyParameter10FormatUID
 PointUncertainties.nUncertaintyParameter1FormatUID
 PointUncertainties.nUncertaintyParameter2FormatUID
 PointUncertainties.nUncertaintyParameter3FormatUID
 PointUncertainties.nUncertaintyParameter4FormatUID

PointUncertainties.nUncertaintyParameter5FormatUID
PointUncertainties.nUncertaintyParameter6FormatUID
PointUncertainties.nUncertaintyParameter7FormatUID
PointUncertainties.nUncertaintyParameter8FormatUID
PointUncertainties.nUncertaintyParameter9FormatUID
PointUncertainties.nUncertaintyStandardFormatUID
PointUncertainties.nUpperLimitFormatUID
Procedures.nProcedureUID
ServiceTypes.nServiceTypeUID
ToolAssignmentEx.nToolAssignmentExUID
ToolAssignmentEx.nToolAssignmentUID
ToolAssignments.nAssetUID
ToolAssignments.nToolAssignmentUID
TypeProcedureDefaults.nProcedureUID
TypeProcedureDefaults.nTypeProcedureDefaultUID
TypeProcedureDefaults.nTypeUID
Types.nImageUID
Types.nTypeUID
TypesEx.nTypeExUID
TypesEx.nTypeUID
Units.nUnitUID
Users.nUserUID

Other columns that should not be assigned:

CallSheetResults.cDataOrigin
CallSheetResults.IRun
CallSheets.nRevision
Units.cUnitSymbol

Import Setup

The Import Setup allows for specifying date formats found in the data file and the data separator used, as well as options to reject calibrations performed with out-of-cal standards and enforcing all upper case character entries. Default user, type, and facility records must be selected as fallbacks for missing referential data in the data file. Determining the separator and date formats used in the data file can be automated by uploading the data file to be imported via the “Determine Separator and Date Formats from the Data File...” button. The New Import Setup screen is displayed.

- **Description** – The description for this import setup.
- **Import Definition** – The Import Definition to be used.
 - The Import Definition can be changed by selecting the “...” button.
 - The Import Definition can be viewed by selecting the Quick Link button.
- **Date Format 1, Date Format 2, Date Format 3, and Date Format 4** – Enter up to 4 different date formats.
 - Use M[M] for month, d[d] for day and yyyy for year.

For example, if the data file contains a date formatted as 2000-12-31, enter the following 4 formats:

yyyy-MM-dd
yyyy-MM-d
yyyy-M-dd
yyyy-M-d

which covers dates like the following:

2000-12-31
2000-12-1
2000-1-31
2000-1-1

- If there are variations in the date formats other than month/day variations , for example a mixture of 2000-12-31 and 12/31/2000 in the same file, data cleanup should be performed before attempting to import the file.
- **Separator** – The data separator used in the file, comma, semi-colon, pipe or tab.

- For a tab delimited file, check the Use Tab check box.
- Comma is not recommended as a separator, as the data itself may contain commas
- To automatically detect date formats and separator from the data file, press the “Determine Separator and Date Formats from Data File...” button. If successful, the four date format fields are populated as well as the separator dropdown. If it cannot determine the formats and/or separator from the data in the file, the according entry field will remain empty.
- **Skip Header Rows** – Rows to skip in data file.
 - If the data file to be imported contains one or more header rows, enter the number of leading rows to skip here.
- **Automated Order** – Order in which to run automated imports.
 - Import Setups flagged as automated are run in the order specified here.
 - Must be unique.
- **File Extension** – Data file extension associated with this automated Import Setup.
 - Each automated Import Setup is associated with a unique file extension.
 - All data files in the Import Data directory with this extension are processed (one import is run per file found), for this automated Import Setup.
- **Automated** – Indicates this setup runs automated.
 - The automated import process checks the Import Data Directory set up in SystemDefaults every 5 minutes for new data files associated with this automated Import Setup. If files with the File Extension specified are found, one import is run per file.
 - Automated Import Setups must have a unique File Extension and a unique Automated Order, so that the automated import process knows which files to look for and in which order to process multiple automated Import Setups.
 - Each file imported is moved to the \Processed sub directory in the Import Data Directory, with a unique name that reflects the date and time it was processed.
- **Convert to UPPER CASE** – Modifies strings imported by setting all characters to caps.
 - Check to convert all data to UPPER CASE. Note that this option is comprehensive and may lead to senseless and/or ambivalent unit prefixes (e.g. MV instead of mV).
- **Allow In Cal Standards Only** – Checks if standards are in cal.
 - To not allow importing calibrations where the standard used was out of cal, check the Use In Cal Standards Only check box.
- **Update Existing Data** – Determines whether this import will perform an update on or skip over existing records.
- **Data File Time Zone** – Select the time zone the data originated in, for date/time adjustment to UTC
- **Default User** – The user to be used for data elements requiring user information that is not explicitly provided in the data file.
 - The Default User can be changed by selecting the “...” button.
 - **Recommendation:** use a user specifically created for this purpose and name it appropriately, so imported records can be easily identified, e.g. Default Import User.
- **Default Type** – The type to be used for data elements requiring type information that is not explicitly provided in the data file.
 - The Default Type can be changed by selecting the “...” button.
 - **Recommendation:** use a type specifically created for this purpose and name it appropriately, so imported records can be easily identified, e.g. Default Import Type.

- **Default Facility** – The facility to be used for data elements requiring facility information that is not explicitly provided in the data file.
 - The Default Facility can be changed by selecting the “...” button.
 - **Recommendation:** use a facility specifically created for this purpose and name it appropriately, so imported records can be easily identified, e.g. Default Import Facility.

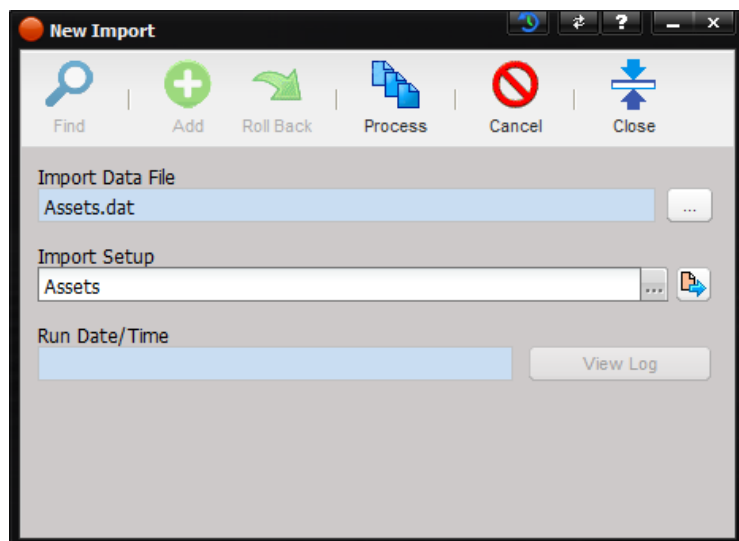
Run Import

The Run Import screen allows for processing the data to be imported. Once the Run Import menu item is selected, the system verifies that the required system defaults needed by the Import are configured correctly. If not, messages are displayed.



If Yes is selected, the System Defaults Edit screen is displayed, allowing for the settings to be changed. The directories are for temporary storage and refer to a local path on the server, e.g.: c:\import\data.

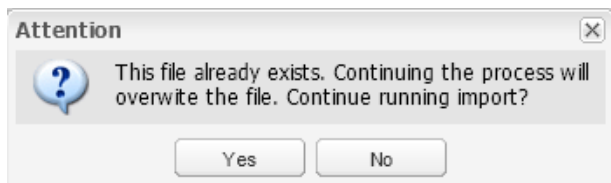
If the settings are set properly, the Find screen is displayed. Select the Cancel button create a new import. Before performing an import, open the data file in a text editor and note if there are column headings in the first row(s) of the file, to be skipped over when the data is processed.



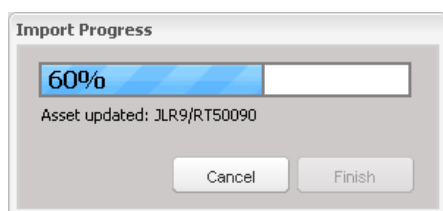
- **Import Data File** – The data file to import.
 - The Import Data File can be changed by selecting the “...” button.
- **Import Setup** – The import setup to be used.
 - The Import Setup can be changed by selecting the “...” button.

- The Import Setup can be viewed by selecting the Quick Link button.
- **Run Date/Time** – The date the import was processed. This field is automatically populated.
- **View Log** – This button is enabled when opening a processed Import for review and allows for downloading the log information as a text file.

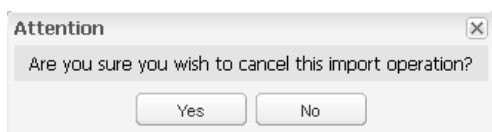
Select the Process button to initiate the import. If a file with the same name exists in the temporary location, a confirmation warning is displayed.



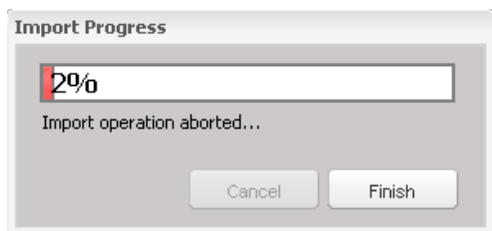
When the import is running, progress is displayed on the screen.



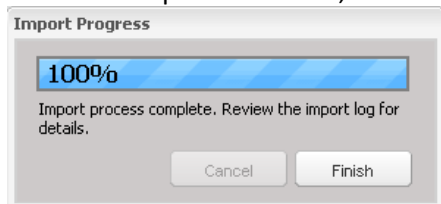
To abort the import, press the Cancel button on the Import Progress screen. A confirmation prompt is displayed.



The Import Progress displays the progress bar showing that the import operation was aborted.



When the import is finished, a confirmation message is displayed.



Upon selecting the Finish button, the Run Date/Time is filled in and the View Log button is enabled.

Rejected records are added to a redo file with the same name as the source, but an extension of ".redo000.txt". For example, a data file called "test.src" creates a redo file called "test.redo000.txt". Subsequent processing of the same Import Data File creates redo files with an increased number in the redo extension, up to 999 (i.e.; ".redo000.txt", ".redo001.txt" ... ".redo999.txt").

Select the View Log button to display the log that was created for the import. This log shows any problems that occurred during the import.

Reviewing a Completed Import

To review completed Imports, select the Run Import menu option. The Find screen is displayed. Enter search criteria and select the OK button to open the desired import.

Select the View Log button to review the log.

```
Process:
20121116 04:02:49 : Starting import Customers...
20121116 04:02:49 : Validating import definitions...
20121116 04:02:49 : Import complete, 0:00:00:00 elapsed.

Data:
20121116 04:02:49 : New facility created: CSA International
20121116 04:02:49 : New address created: 2805 Barranca Parkway
20121116 04:02:49 : New asset created: E015
```

The log is downloaded as a text file or opened inside your browser, depending on the type of browser and settings.

The top section “Process” displays the steps performed during the import. The bottom section “Data” displays a list of new items created and/or existing items updated.

Rolling Back an Import

To roll back an Import, select the Run Import menu option. The Find screen is displayed. Enter search criteria and select the OK button to open the desired import.

On the Import screen, select the Delete button and confirm to roll back the Import.

The rollback deletes items that were created when the import was performed, as long as there aren’t any dependencies on that data, created after the Import was run. For example, after creating a new work order for an Asset that came in on Import #1, rolling back Import #1 cannot remove the Asset because a work order is dependent on it.

Note: *Data updated during the course of running an import is not rolled back to their prior values. Rollbacks only apply to newly created records.*

Import Data Tables

The Import function allows for importing delimited files with data for the following tables.

Addresses	(addresses)
AssetEx	(extended Asset data)
AssetFiles	(files attached to Assets, file type: Asset)
AssetLog	(Asset change log)
AssetServices	(periodic and one time actions, like calibration or maintenance)
Assets	(inventory)
CallSheetEx	(extended work order data)
CallSheetFiles	(files attached to work orders, file type: Work Order)
CallSheetPartsLink	(parts needed for a work order)
CallSheetResults	(grouping of data points belonging to a work order)
CallSheetStandardLink	(standards used via a work order)
CallSheets	(work orders)
Contacts	(contact information)

FacilityContactLink	(contact for a facility, established automatically if both are found)
Facilities	(lab, manufacturer, customer, vendor, work shop, department)
FacilityEX	(extended facility information)
FacilityUserLink	(facilities a user has access to)
Files	(files)
JobNumbers	(job order numbers)
Labor	(work performed information)
ManualTemplateRows	(rows of a manual template)
ManualTemplates	(manual templates)
Parts	(parts)
PointAmbients	(ambient data points)
PointExLogicals	(extended data point information, logical values)
PointExNumerics	(extended data point information, numerical values)
PointExStrings	(extended data point information, character values)
PointReadings	(Individual readings that were averaged to form a data point)
PointStatistics	(statistical values about a data point)
PointTolerances	(tolerance information for a data point)
PointUncertainties	(uncertainty data calculated for a data point)
Points	(data points)
Procedures	(procedures)
Service Types	(service types)
ToolAssignmentEx	(extended tool assignment information)
ToolAssignments	(tool assignments)
TypePartsLink	(parts needed for repair or bill of materials)
TypeProcedureDefaults	(procedure defaults per type)
Types	(types)
TypesEx	(extended type information)
Units	(units)
Users	(users)

Importing Logical Values

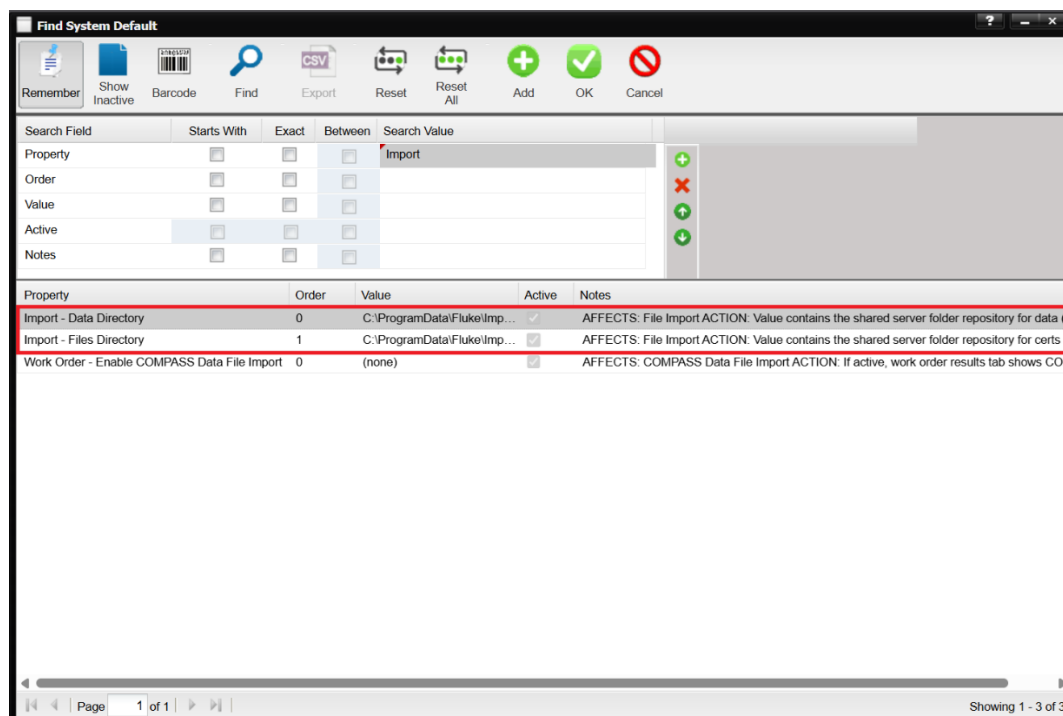
When importing values into logical (boolean) fields, use -1 to represent TRUE and 0 to represent FALSE.

Importing Units

To import units into the Units table, cBaseUnit is required. This field accommodates units without a prefix, like volts (V) or ampere (A). To import units that do have a prefix, like μA , the cPrefix field should be included in the Import Definition. To reference a unit when importing calibration data, prefix and base unit must be specified in one column, in that order, separated by a double-colon (::). For example, to import DUT (device under test) measurements into the Points table, the number of the measurement goes into the nUUT column, the unit into nUUTUnitUID using the format <base unit> or <prefix>::<base unit> (i.e. V for Volts or m::V for millivolts).

Example: Importing Files into MET/TEAM

In order to import files into MET/TEAM, the System Defaults for *Import – Data Directory* and *Import – Files Directory* needs to be set up. To get to the System Defaults, select the Configure menu (which is only available if you have Administrative or Configure rights), page down the alphabetized list until you see the two import defaults.



Import – Data Directory is used by MET/TEAM to store temporary data – **do not use for storing data**

Import – Files Directory is where the files are to be placed

In the data file to be imported, the files are then referenced simply by their file name, for example: *Report 110210133.PDF* and the import will look for a file of that name in the location specified in the system default: *Import – Files Directory*.

Example data file, using a pipe symbol as the separator:

Files.cFileName|Files.cFileType|Files.iFile
Report 110210133.PDF|Problem Report|Report 110210133.PDF
Report 110210134.PDF|Problem Report|Report 110210134.PDF
Report 110210135.PDF|Problem Report|Report 110210135.PDF

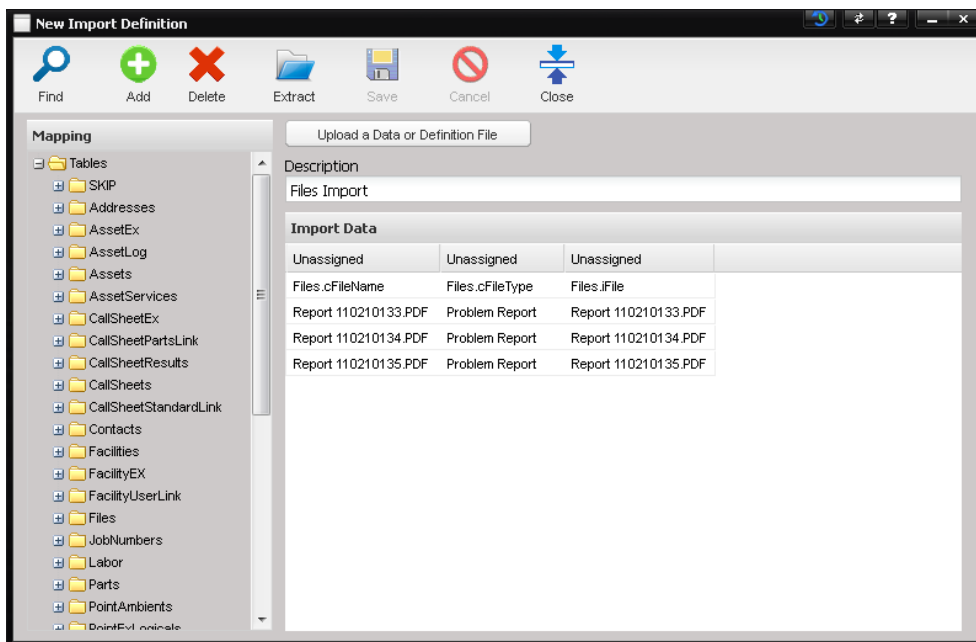
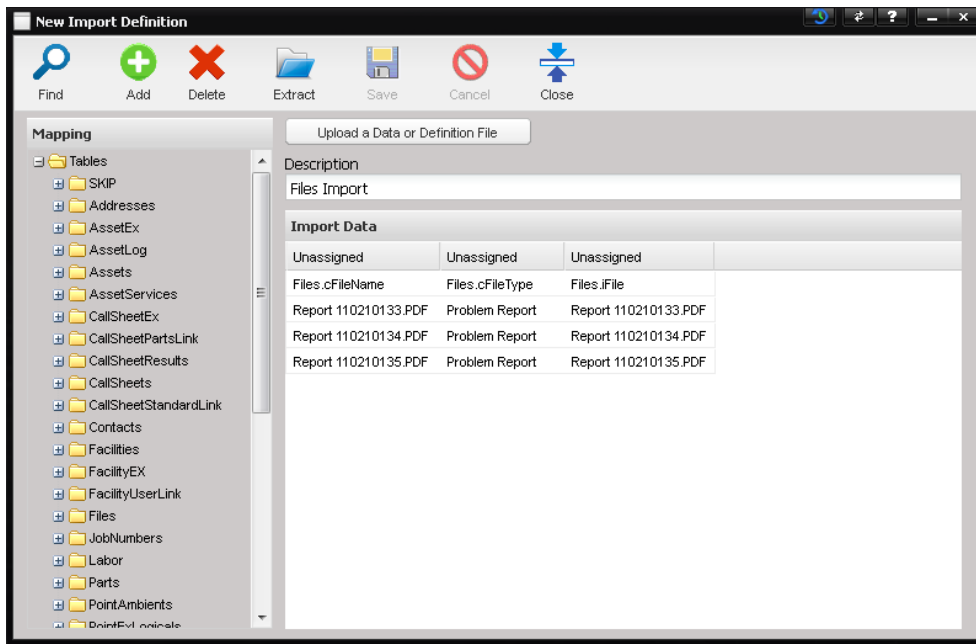
Files.cFileType can be one of the following:

- Accreditation
- Asset
- Checklist
- Facility
- Image
- Manual Template
- Part
- Problem Report
- Procedure
- Project

Tool Assignment
Type
Work Order

Import Definition

Load the data file into the *Import Definition* screen and assign the columns, to make the definition:



Example - Import Setup:

Since our data files contain headers as the first row, it is important to enter 1 into *Skip Header Rows*, so the import doesn't interpret the headers as data.

Edit Import Setup

Find | Add | Delete | Save | Cancel | Close

Determine Separator and Date Formats from Data File... ☒ Active

Description
Files Import

Import Definition
Files Import

Date Format 1: yyyy-M-d | Date Format 2: | Date Format 3: | Date Format 4: |

Separator: | | Skip Header Rows: 1 | Automated Order: 0 | File Extension: |

☐ Use Tab Separator | ☐ Automated

☐ Convert to UPPER CASE | Data File Time Zone: Central Standard Time

☐ Allow In Cal Standards Only

☐ Update Existing Data

Default User: Default Import User | Default Type: Default Import Type | Default Facility: Default Import Facility

Run the import:

New Import

Find | Add | Roll Back | Process | Cancel | Close

Import Data File
Import Files.dat

Import Setup
Files Import

Run Date/Time
View Log

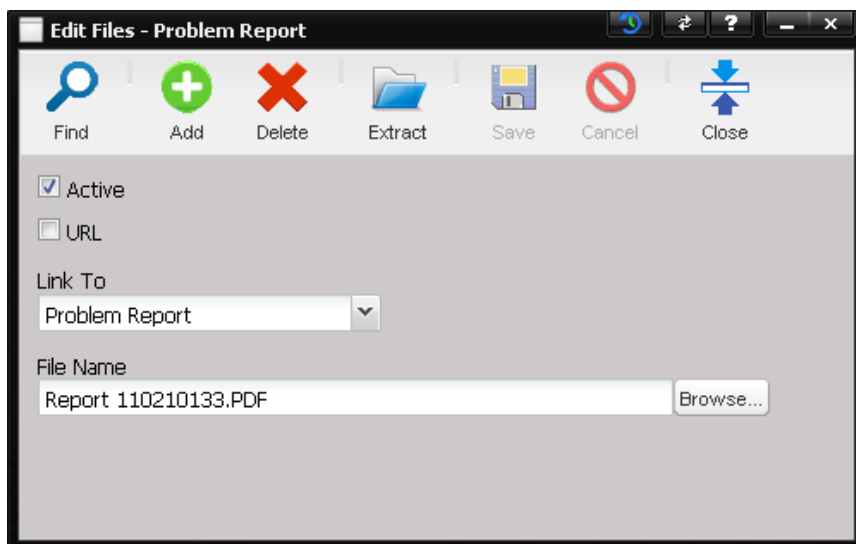
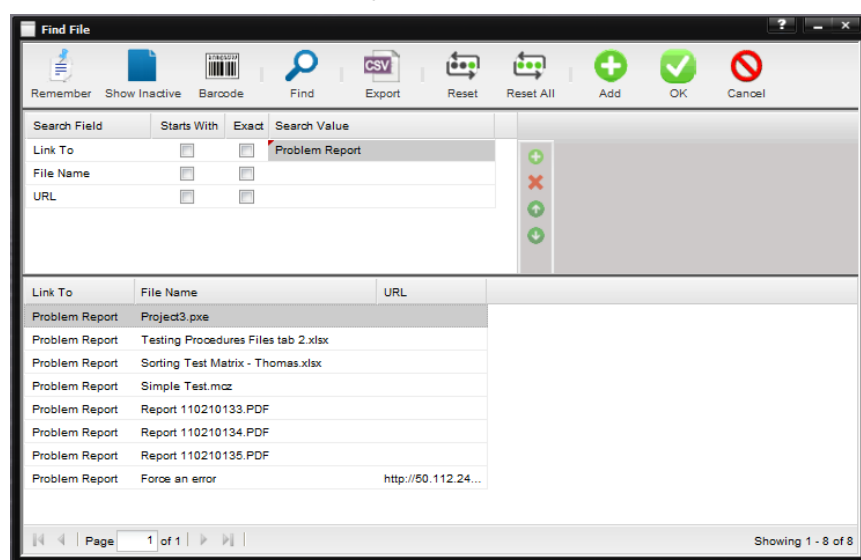
The log file should look similar to this:

```

0 10 20 30 40 50 60
1 Process:
2 20130315 12:17:42 : Starting import Files Import...
3 20130315 12:17:42 : Updates are disabled
4 20130315 12:17:42 : Validating import definitions...
5 20130315 12:17:42 : Validating import setup...
6 20130315 12:17:42 : Import complete, 0:00:00:00 elapsed.
7
8
9 Data:
10 20130315 12:17:42 : New file created for: Report 110210133.PDF
11 20130315 12:17:42 : New file created for: Report 110210134.PDF
12 20130315 12:17:42 : New file created for: Report 110210135.PDF

```

To access the new files in MET/TEAM:



Import - Required Fields per Table

Table	Required Field(s)	Notes
Addresses	Addresses.nFacilityUID	Use Facilities.cFacilityName as the value
	Addresses.cType Addresses.cAddress1	The three required fields comprise the unique key per address.
Assets	Assets.cBarcode	Auto-generated if not specified
AssetEx	N/A	
AssetFiles	<any one of the available fields>	Table must be in import definition to associate files of type <i>Asset</i> to assets; available fields: IPrivate and IActive
AssetLog	AssetLog.cBarcode	
AssetServices	AssetServices.nServiceTypeUID AssetServices.tMaintDate	An Asset Scheduled Service is unique by nServiceTypeUID for each asset. The Maintenance date is required, but not part of the unique key.
CallSheets	CallSheets.tMaintDate	
CallSheetEx	N/A	
CallSheetFiles	<any one of the available fields>	Table must be in import definition to associate files of type <i>Work Order</i> to work orders; available fields: IPrivate and IActive
CallSheetPartsLink	N/A	
CallSheetResults	CallSheetResults.cDescription	
CallSheetStandardLink	CallSheetStandardLink.nAssetUID	Use Assets.cBarcode as the value
Contacts	Contacts.cEmail2	
Facilities	Facilities.cFacilityName	
FacilityContactLink	Automatic, if both the facility and contact are specified in the record	
FacilityEx	N/A	
FacilityUserLink	N/A	
Files	Files.cFileName Files.cFileType	
JobNumbers	JobNumbers.cJobOrderNumber	
Labor	Labor.cLaborAccount	
ManualTemplateRows	ManualTemplateRows.nOrdinal	

ManualTemplates	ManualTemplates.cTemplateName	
Parts	Parts.cPartNumber	
Points	Points.cPointDescription	
PointAmbients	N/A	
PointExLogicals	N/A	
PointExNumerics	N/A	
PointExStrings	N/A	
PointReadings	PointReadings.nReadingOrdinal	
PointStatistics	N/A	
PointTolerances	N/A	
PointUncertainties	N/A	
Procedures	Procedures.cProcedureName	
Service Types	ServiceTypes.cServiceName (Service Type) ServiceTypes.cServiceType (Service Mode)	
ToolAssignments	ToolAssignments.tLoanDate	
ToolAssignmentEx	N/A	
TypePartsLink	TypePartsLink.nQuantity (it is the only field)	
Types	Types.cDescription	
	Types.cModelNumber	
	Types.nManufacturerUID	Use Facilities.cFacilityName as the value
TypesEx	N/A	
TypeProcedureDefaults	N/A	
Units	Units.cBaseUnit	
Users	Users.cUserName	

Dependent Tables to be Included per Table

Table	Dependent Table(s)
Addresses	Facilities
Assets	Types
AssetEx	Assets Types
AssetFiles	Assets Files Types
AssetServices	Assets Types
CallSheetEx	Assets CallSheets Types

CallSheetFiles	Assets CallSheets Files Types
CallSheetPartsLink	Assets CallSheets Parts Types
CallSheetResults	Assets CallSheets Types
CallSheetStandardLink	Assets CallSheets Types
CallSheets	Assets Types
FacilityContactLink	Contacts Facilities
FacilityEx	Facilities
FacilityUserLink	Facilities Users
Labor	Assets CallSheets Types Users
ManualTemplateRows	ManualTemplates Files
ManualTemplates	Files
Points	Assets CallSheetResults CallSheets Types
PointAmbients	Assets CallSheetResults CallSheets Points Types
PointExLogicals	Assets CallSheetResults CallSheets Points Types
PointExNumerics	Assets CallSheetResults CallSheets Points

	Types
PointExStrings	Assets CallSheetResults CallSheets Points Types
PointReadings	Assets CallSheetResults CallSheets Points Types
PointStatistics	Assets CallSheetResults CallSheets Points Types
PointTolerances	Assets CallSheetResults CallSheets Points Types
PointUncertainties	Assets CallSheetResults CallSheets Points Types
ToolAssignments	Assets Types
ToolAssignmentEx	Assets ToolAssignments Types
TypePartsLink	Types Parts
TypeProcedureDefaults	Procedures Types
TypesEx	Types
Users	Facilities

UTC Date/Time Adjustment During an Import

The Import Setup screen has a drop down with time zones available on the MET/TEAM server PC. Select the time zone most closely resembling the origin of the data to be imported. Dates in the data files will be adjusted to UTC time using the selected time zone's offset when imported.

Manual Template Row Types

Blank	0
Inside Limit	1

<=	2
>=	3
Y = Pass	4
Y = Fail	5
Checkbox	6
Report label	7
Bold label	8
Enter text	9
Inside Limit!	10
<=!	11
>=!	12

Sample Import Definitions

The following sample Import definitions can be saved to a file and imported into the Import Definition screen, or used as a starting point for making an Import Definition.

Assets

MET/TEAM

Types.cModelNumber

Types.nManufacturerUID

Types.cDescription

Assets.nFacilityUID

Assets.nManufacturerUID

Assets.nMaintenanceFacUID

Assets.nAssignedFacUID

Assets.nAuthorizedFacUID

Assets.cBarcode

Assets.cID

Assets.cSerialNumber

Assets.cModelNumber

Assets.cDisposition

Assets.cDescription

Assets.IStandard

Assets.IRecallMaintenanceType

Work Orders

MET/TEAM

Types.cModelNumber

Types.nManufacturerUID

Types.cDescription
 Assets.cBarcode
 AssetServices.nServiceTypeUID
 CallSheets.nFacilityUID
 CallSheets.nWorkingFacilityUID
 CallSheets.nOwningLabUID
 CallSheets.nProcedureUID
 CallSheets.nTechnicianUID
 CallSheets.nReturnedByUID
 CallSheets.cInitialCondition
 CallSheets.cServiceReason
 CallSheets.cCallSheetType
 CallSheets.cStickerType
 CallSheets.cCallSheetStatus
 CallSheets.cCallSheetNumber
 CallSheets.cCertificationNumber
 CallSheets.cInterval
 CallSheets.cIntervalUOM
 CallSheets.cLocation
 CallSheets.cCertFormat
 CallSheets.tOpenDate
 CallSheets.tRequiredDate
 CallSheets.tMaintDate
 CallSheets.tMaintNextDate
 CallSheets.tClosedDate
 CallSheets.tReturnedDate
 CallSheets.nPriority

Work Orders w/Results
 MET/TEAM

Types.cModelNumber
 Types.nManufacturerUID
 Types.cDescription
 Assets.cBarcode
 AssetServices.nServiceTypeUID
 CallSheets.nFacilityUID
 CallSheets.nWorkingFacilityUID

CallSheets.nOwningLabUID
 CallSheets.nProcedureUID
 CallSheets.nTechnicianUID
 CallSheets.nReturnedByUID
 CallSheets.cInitialCondition
 CallSheets.cServiceReason
 CallSheets.cCallSheetType
 CallSheets.cStickerType
 CallSheets.cCallSheetStatus
 CallSheets.cCallSheetNumber
 CallSheets.cCertificationNumber
 CallSheets.cInterval
 CallSheets.cIntervalUOM
 CallSheets.cLocation
 CallSheets.cCertFormat
 CallSheets.cWorkOrderResults
 CallSheets.tOpenDate
 CallSheets.tRequiredDate
 CallSheets.tMaintDate
 CallSheets.tMaintNextDate
 CallSheets.tClosedDate
 CallSheets.tReturnedDate
 CallSheets.nQuantity
 CallSheets.nPriority
 CallSheetResults.nProcedureUID
 CallSheetResults.nTechnicianUID
 CallSheetResults.nRunAtFacilityUID
 CallSheetResults.nCallSheetResultOrdinal
 CallSheetResults.cDescription
 CallSheetResults.cStatus
 CallSheetResults.cCallSheetResultType
 CallSheetResults.tStartTime
 CallSheetResults.tEndTime

Work Orders w/Results and Points
 MET/TEAM
 Types.cModelNumber

Types.nManufacturerUID
Types.cDescription
Assets.cBarcode
AssetServices.nServiceTypeUID
CallSheets.nFacilityUID
CallSheets.nWorkingFacilityUID
CallSheets.nOwningLabUID
CallSheets.nProcedureUID
CallSheets.nTechnicianUID
CallSheets.nReturnedByUID
CallSheets.cInitialCondition
CallSheets.cServiceReason
CallSheets.cCallSheetType
CallSheets.cStickerType
CallSheets.cCallSheetStatus
CallSheets.cCallSheetNumber
CallSheets.cCertificationNumber
CallSheets.cInterval
CallSheets.cIntervalUOM
CallSheets.cLocation
CallSheets.cCertFormat
CallSheets.cWorkOrderResults
CallSheets.tOpenDate
CallSheets.tRequiredDate
CallSheets.tMaintDate
CallSheets.tMaintNextDate
CallSheets.tClosedDate
CallSheets.tReturnedDate
CallSheets.nQuantity
CallSheets.nPriority
CallSheetResults.nProcedureUID
CallSheetResults.nTechnicianUID
CallSheetResults.nRunAtFacilityUID
CallSheetResults.nCallSheetResultOrdinal
CallSheetResults.cDescription
CallSheetResults.cStatus

CallSheetResults.cCallSheetResultType

CallSheetResults.tStartTime

CallSheetResults.tEndTime

Points.cPointDescription

Points.nUUT

Points.nUUTUnitUID

Facilities

MET/TEAM

Facilities.cFacilityName

Facilities.cFacilityType

Facilities.cFacilityNumber

Facilities.cDistrict

Facilities.lManufacturer

Facilities.lCustomer

Facilities.lSubContractor

Facilities.lLab

Facilities.lHandHeldUse

Facilities.lNoRecall

Facilities.lNoTax

Facilities.lInspectionRate

Tool Assignments

MET/TEAM

Types.cModelNumber

Types.nManufacturerUID

Types.cDescription

Assets.cBarcode

ToolAssignments.nContactUID

ToolAssignments.cAssignmentNumber

ToolAssignments.cAssignedLocation

ToolAssignments.tLoanDate

ToolAssignments.tExpectedReturnDate

ToolAssignments.tReturnDate

ToolAssignments.nUseCount

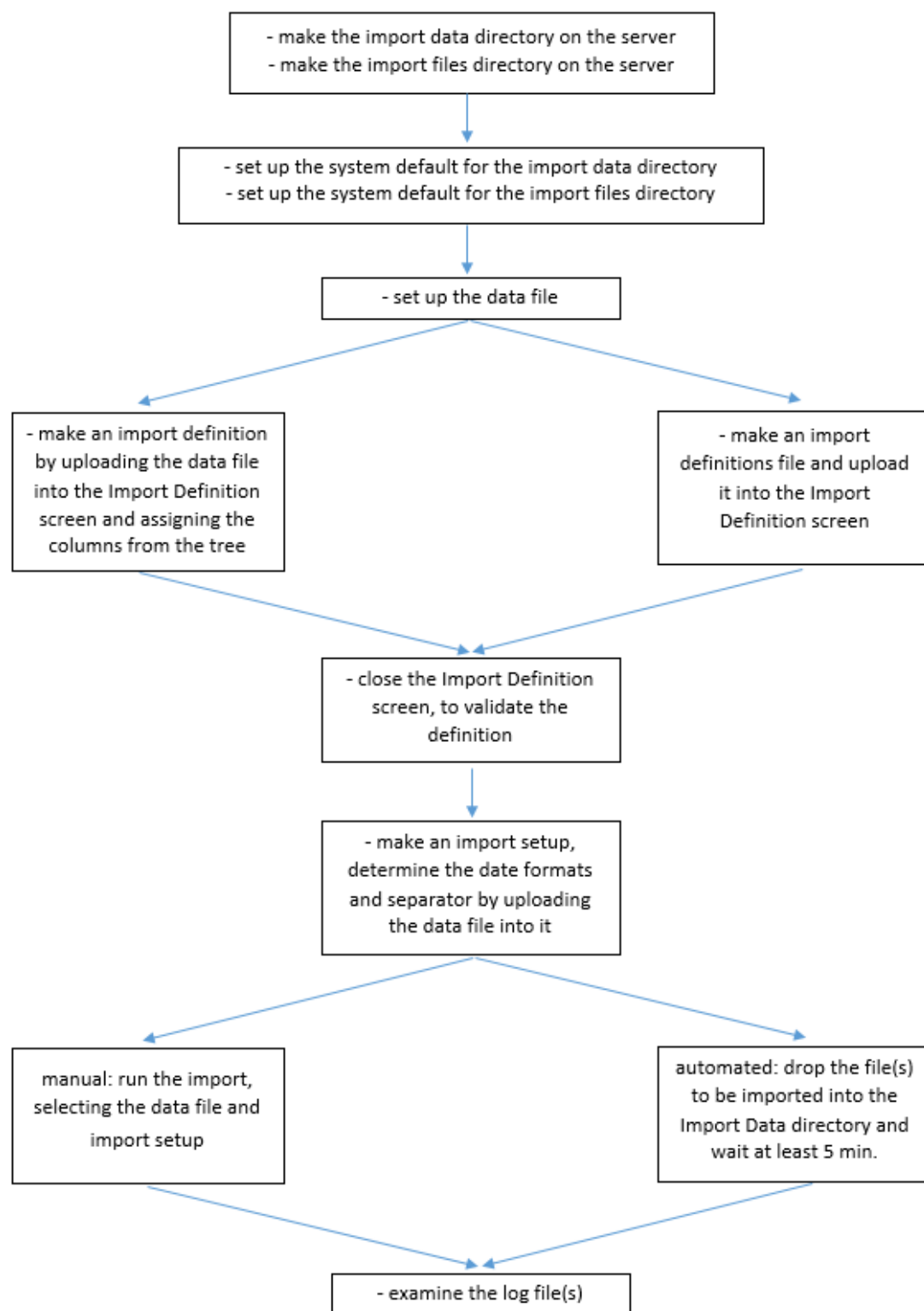
ToolAssignments.mNotes

Manual Templates

MET/TEAM

Files.cFileName
ManualTemplates.cTemplateName
ManualTemplates.mNotes
ManualTemplates.lAllowActual
ManualTemplates.lIsTransducer
ManualTemplateRows.nNominalUnitUID
ManualTemplateRows.nRefUnitUID
ManualTemplateRows.cDescription
ManualTemplateRows.cLabel
ManualTemplateRows.cNominal
ManualTemplateRows.cRefNominal
ManualTemplateRows.cStep
ManualTemplateRows.cUncertaintyNotes
ManualTemplateRows.nLowerLimit
ManualTemplateRows.nOrdinal
ManualTemplateRows.nResolution
ManualTemplateRows.nRowType
ManualTemplateRows.nTur
ManualTemplateRows.nUncertainty
ManualTemplateRows.nUpperLimit
ManualTemplateRows.lUUTIsSource

Import Process - Flow Chart



Mobile

The Mobile add-on for MET/TEAM allows for a subset of data from the master database to be checked out (copied) to go off site and perform calibrations, and to check in data to the master database that was collected while off site upon returning.

MET/TEAM Mobile includes most but not all features of MET/TEAM.

Excluded menu options:

- File -> Import
- Workflow -> Tool Assignments
- Reports -> Alerting Schedules
- Setup -> Services
- Configure -> Send System Message
- Configure -> Menu Security
- Configure -> Groups
- Configure -> Extended Data

Excluded functionality:

- Cannot Unlock Work Orders or edit/copy/delete Results on Work Orders that were created prior to Mobile check-out.

Before using the Mobile feature, make sure the Mobile Configuration settings are correct. See the Mobile Configuration option the Configure menu for more details.

Check-Out

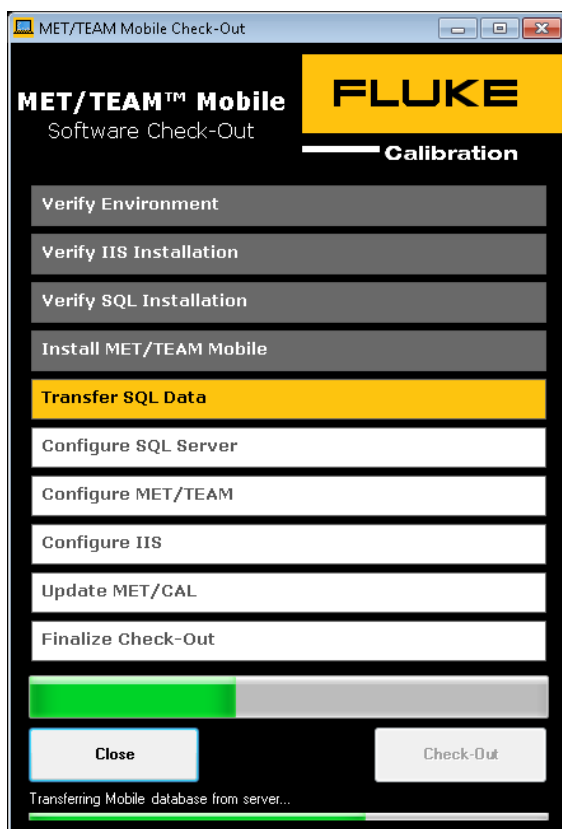
When the File menu Mobile submenu Check-Out option is selected, the Select Facilities screen is displayed (only facilities marked as customers are listed). Select the Facilities that own the Assets that you plan to work with while you are off site using the Mobile feature. After the facilities have been selected, the Check Out process creates and downloads the METMobile.exe application which is used to install and configure a snap shot of the MET/TEAM website onto the mobile workstation, reserve licenses on the server, and make a copy of the MET/TEAM database with access to only the records associated with the selected Facilities.

To complete the Mobile Check Out, run the downloaded METMobile.exe application.

Note: MET/TEAM digitally signs this application using a generic code signing certificate, however some security and/or anti-virus software may still attempt to block or flag this application as being potentially malicious. If you are unable to run the application successfully for this reason, you may need to configure MET/TEAM to use a custom/proprietary code signing certificate or configure your security software to not block it. Refer to the Mobile Configuration settings for more details.

The MET/TEAM Mobile Software Check-Out screen is displayed. To start the Check-Out process, select the Check-Out button.

If MET/CAL is installed on the mobile workstation, a prompt is displayed asking if a MET/CAL license should be reserved for this mobile workstation. If MET/CAL is used on the mobile workstation, you must select Yes. This copies the MET/CAL shared files from the server to the mobile workstation and configures MET/CAL to use the local copy of these files. If No is selected, MET/CAL is not allowed to be used on the mobile workstation while checked out.



This process may display a warning if the MET/TEAM database size is approaching or exceeds 10GB and the mobile workstation is using an Express edition of SQL Server®.

When the Check-Out process is complete, a shortcut is created on the desktop for launching the MET/TEAM Mobile website on the mobile workstation.

Note: You should avoid running MET/TEAM from the server on the mobile workstation once MET/TEAM Mobile is configured in order to reduce potential confusion.

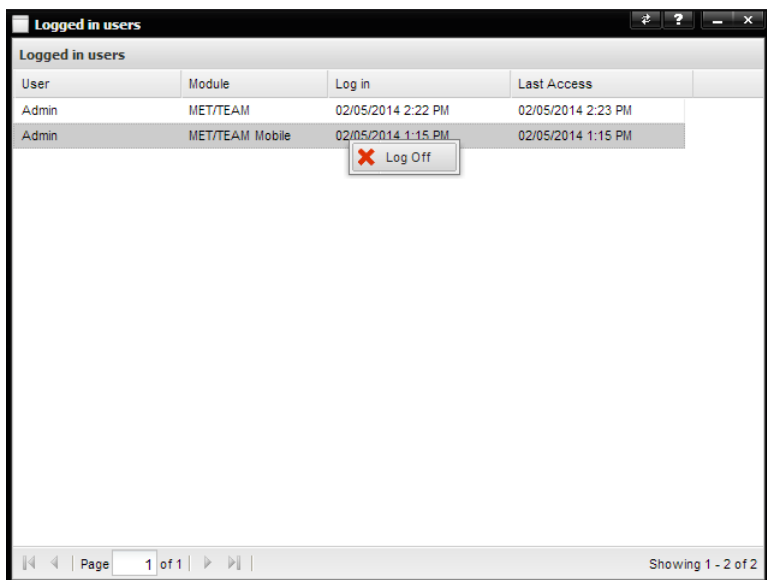
Licenses

The MET/TEAM Mobile Check-Out process reserves one MET/TEAM Mobile license on the server for this workstation and optionally reserves a MET/CAL license on the server.

The mobile instance of MET/TEAM uses MET/TEAM trial licenses and are given expiration dates of two months from the current date. The Check-In process must be performed within this period or the licenses will expire. A MET/CAL license is included only if the user chose to reserve a MET/CAL license.

In the case of an expired mobile workstation Check Out, reserved licenses can be released using the Help menu About submenu Logged In Users screen on the main MET/TEAM website. Right-click on a reserved MET/TEAM Mobile license and select Log Off from the popup menu.

Note: Releasing a MET/TEAM Mobile license prevents the mobile workstation from being able to do a Mobile Check In! Never release a MET/TEAM Mobile license unless you are absolutely sure that the data on the mobile workstation does not need to be checked in!



User	Module	Log in	Last Access
Admin	MET/TEAM	02/05/2014 2:22 PM	02/05/2014 2:23 PM
Admin	MET/TEAM Mobile	02/05/2014 1:15 PM	02/05/2014 1:15 PM

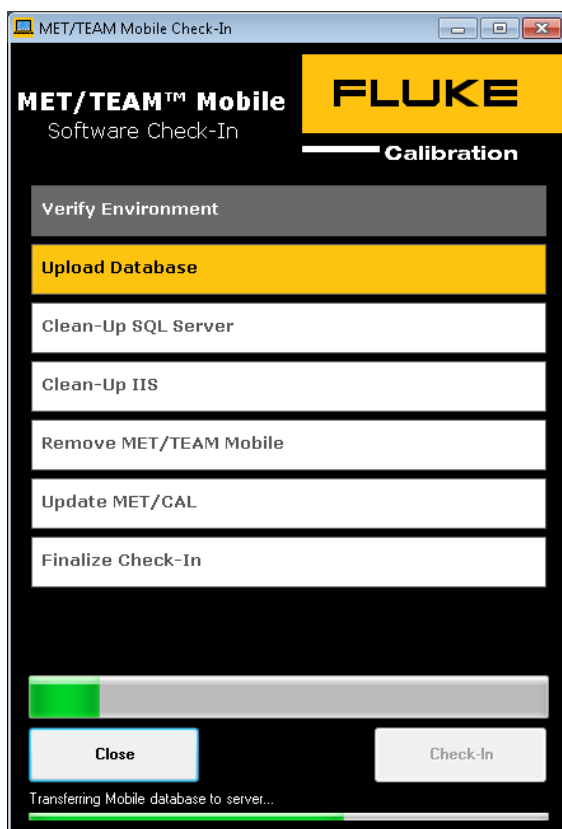
Page 1 of 1 | Showing 1 - 2 of 2

Check-In

Once you have completed using the mobile workstation, a mobile Check-In needs to be performed to update the MET/TEAM server database. The File menu Mobile submenu Check-In option is only available when running the MET/TEAM Mobile website on a mobile workstation. The Check- In operation can only be performed when the mobile workstation is connected to the network and has access to the MET/TEAM server. After the Check-In option is selected, a new METMobile.exe is generated and downloaded to the workstation.

Launch the METMobile.exe application.

The MET/TEAM Mobile Software Check-In screen is displayed. To start the Check- In process, select the Check-In button.



When the Check-In process is complete, the MET/TEAM Mobile website is completely removed from the mobile workstation, the shortcut is removed from the desktop and the reserved licenses on the server are released.

If a MET/CAL license was reserved on Check-Out, the MET/CAL configuration on the mobile workstation is restored to its original state.

Note: *If any of the MET/CAL shared files in the temporary location on the mobile workstation were altered, the user must manually copy the altered files back to the MET/CAL share on the server prior to performing the Check-In.*

Check-In Rules

The Mobile Check-In process attempts to update the MET/TEAM server's database with the changes that were made to existing records and any new records that were created in the database on the mobile workstation. This brings up the question of what will happen when changes are made to the same records, whether it is an Asset, Type, Work Order, Procedure, etc., on the server and on one or more mobile workstations, and then the mobile workstations perform a Check-In. The simple answer is that if changes were made to existing records on the mobile workstation, the Mobile Check-In process will overwrite any changes made to the same records in the master database, regardless of the timing of the change. If the same records are changed on multiple mobile workstations, the last mobile workstation to perform the Check-In process wins. It is also important to note that these updates are performed on an entire record in the database, not on individual fields within the record.

For example, if an Asset's Warranty Date setting gets changed on the server, and then that same Asset's Not Tracked setting is changed on a mobile workstation, when the mobile workstation performs a Check-In, the Asset's Warranty Date will revert back to its original value and the Not Tracked setting will reflect the change made on the mobile workstation (the mobile workstation's updates "win").

Another thing to consider is that changes to the System Default settings on the mobile workstation are never updated on the server after a Check-In.

Workflow Menu

The Workflow Menu contains is arranged in a work process order and contains all the elements for initiating and completing a work assignment. The menu items are: Receiving, Work Orders, Returning, Bulk Receiving, Shipping, Batch Change, Tool Assignments, and My Work.

Receiving

Receiving is the process of accepting equipment into a maintenance facility for work. Once the service facility receives and processes the equipment MET/TEAM creates open Work Orders for each piece of equipment received. *Equipment managed through MET/TEAM can be configured to have only one open Work Order at a time.*

Note: A Work Order is created for each Asset that is processed when the Process button is selected.

If a Cert Format exists on the Type Procedure Default, the Work Order Cert Format field is filled in.

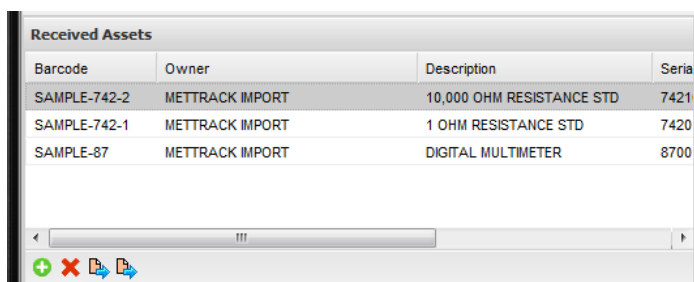
If a Cert Format does not exist on the Type Procedure Default, the Work Order Cert Format field defaults to Cert.rpt.

Equipment with an open Work Order do not show up in the Receiving Find dialog. If a receiving clerk has a piece of equipment to receive, and cannot find the Asset in the Receiving Find screen, but can find it as an Asset in MET/TEAM, this condition would indicate that an open Work Order exists in MET/TEAM.

If an Asset is selected that has special receiving instructions defined in the Receiving Notes field of the associated Type, the receiving clerk is prompted when the asset is selected, either initially or when the asset is added to the Received Assets list. It should be noted that if an asset is received by clicking the Receive button on the Edit Asset screen, and the "Asset - Use Receiving Screen" System Default is not active, any Receiving Note associated with the Type is not displayed to the receiving clerk.

Received Assets

The Received Assets portion of the Receiving screen displays a list of Assets to be received and for which open Work Orders will be created.



Barcode	Owner	Description	Serial
SAMPLE-742-2	METTRACK IMPORT	10,000 OHM RESISTANCE STD	7421
SAMPLE-742-1	METTRACK IMPORT	1 OHM RESISTANCE STD	7420
SAMPLE-87	METTRACK IMPORT	DIGITAL MULTIMETER	8700

The Asset highlighted in grey indicates the currently selected Asset. Information in the Asset Details grid and the Asset Extended Data grid reference the currently selected Asset.

To add an Asset, select the “+” button, select the Asset(s) from the Find dialog, then select OK button to add them to this group.

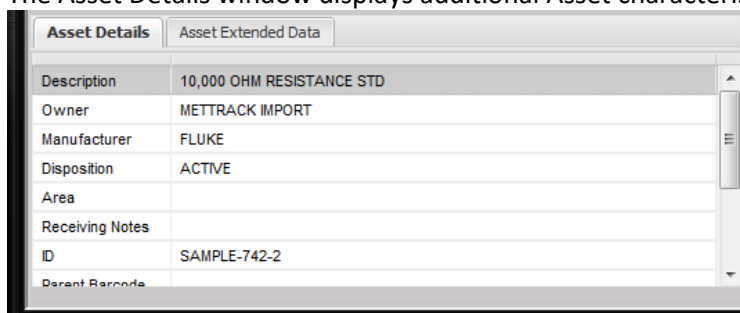
To remove an Asset, select the “X” delete button.

To edit/view the highlighted Asset, select the first Quick Link button.

After Processing the Assets, you can edit/view the associated Work Order by clicking the second Quick Link button.

Receiving – Asset Details

The Asset Details window displays additional Asset characteristics.



Asset Details	
Description	10,000 OHM RESISTANCE STD
Owner	METTRACK IMPORT
Manufacturer	FLUKE
Disposition	ACTIVE
Area	
Receiving Notes	
ID	SAMPLE-742-2
Parent Barcode	

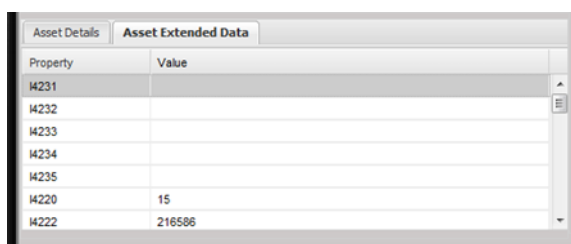
This information can be used to insure the correct Asset is being received. If there are additional instructions that need to be followed, such as receiving notes, they are displayed here. The displayed information is for the Asset highlighted in the Received Assets grid.

Many times there are more elements present for this Asset than can be displayed in the Asset Details window. To view the additional elements, scroll up and down using the scroll bar on the right side of the Asset Detail section. Asset Details can be sorted by ascending or descending order by clicking on the header of the column.

The information in this window is read only. If any of the displayed data needs to be modified, the user must do that on the Asset screen. To quickly get to this Asset, click the Modify button next to the Received Assets grid.

Receiving – Asset Extended Data

The Asset Extended Data window shows extended data elements for the Asset highlighted in the Received Assets grid.



Property	Value
I4231	
I4232	
I4233	
I4234	
I4235	
I4220	15
I4222	216586

Many times there are more elements present for this Asset that can be displayed in the Asset Extended Data window. To view the additional elements the user can scroll up and down using the scroll bar on the right side of the window. The information in this window is read only. If any of the displayed data needs to be modified, the user must do that on the Asset screen. To quickly get to this Asset, click the Modify button next to the Received Assets grid.

Receiving – Receiving Details

The Receiving Details tab is for entering information that will be used on the Work Order.

Note: *Information entered here applies to all of the Assets in the Received Assets Grid.*



Highlight different Assets in the Received Assets grid to change information pertaining to that Asset.

- **Department** – The department for the selected Asset.
- **Location** – The location where the Asset physically resides and is saved in the log notes once the Asset is received.
- **Work Area** – The area of the service facility into which these Assets are received.
- **Reason for Service** – The reasoning the item is in for service.
- **Initial Condition** – The condition of the Asset upon receipt.
- **Priority** – The priority of the item in service.
- **Quantity** – The quantity of Asset pieces, with only a few exceptions (gage blocks) this value is always 1.
- **Job Number** – The job number this service is being charged to.
 - The job number can be changed by selecting the “...” button.
- **Contact Info** – Additional information for the Work Order that may not be on the facility record or may be a one-time piece of information.
- **On Site** – Indicates service must be performed on site.
- **Expedite** – Indicates the customer needs these Assets expedited through the service process.
- **ISO Cert** – Indicates an Accredited Cert needs to be provided for these Assets.
- **Service Type (WO)** – The type of service that is to be performed against these Assets.

Note: *Service Type cannot be customized. The values in this dropdown are setup using the Setup menu Services submenu screen. The order of the Service Types in the dropdown is based on which Service Type was edited last using the Setup menu Services submenu.*
- **Status** – The status these Assets were received under. A log event is created with this status when the Work Order is created.

- **Open Date** – Date the Work Order is opened defaults to the date the receiving process occurred. This date carries forward to the Work Order.
- **Required Date** – The date the customer has requested to get the Assets back from service. By default this date is blank.
***Note:** When any of the three System Defaults Receiving Priority are active, this date is automatically populated based on the Priority on the Receiving Details and the value in the System Default with a pre-defined date.*
- **Category (WO)** – The category of the Work Order. This data is not required but can be used to classify service type or level (silver, gold, platinum, etc.).
- **Sub Category (WO)** – The sub category of the Work Order. This data is not required but can be used to break down categories of Work Orders.

The toggle button to the right of each data field works as a COPY button. When only one asset is being received, these buttons are not shown.

- If the toggle button is depressed () , the entered data is copied to each Asset in the Received Assets grid.
- If the toggle button is not depressed () , different data can be entered for each Asset in the grid.
- If the toggle button is not depressed and the field is left blank, data is not saved.

Use the “Toggle All” button to toggle the state of all the toggle buttons on the Receiving Details tab only. The toggle buttons on the Work Order Extended Data and Log Notes tabs are not affected.

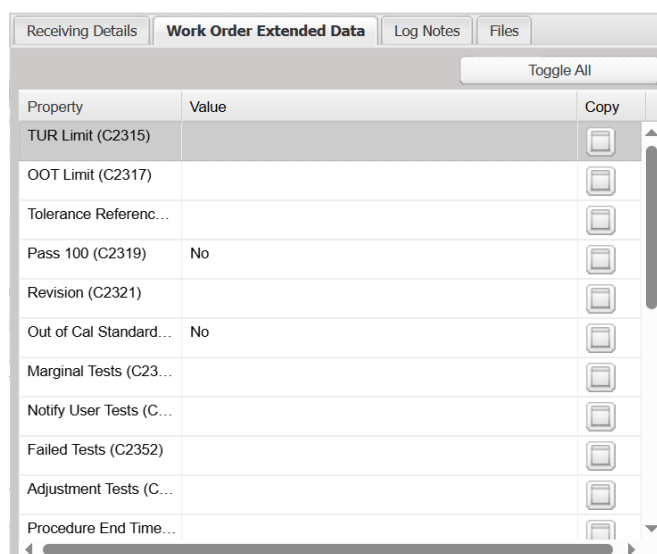
Once the information is entered for the Asset(s), the Process button can be pressed. MET/TEAM creates a Work Order for each Asset in the group.












Reporting from the print button is then available and the reports are driven by the information in the System Defaults table.

A barcode can be printed after the Assets have been “processed” by highlighting the Asset in the Received Assets grid and selecting the Barcode button.

Receiving – Work Order Extended Data

The Work Order Extended Data displays the extended data elements for the Work Orders.





Property	Value	Copy
TUR Limit (C2315)		
OOT Limit (C2317)		
Tolerance Referenc...		
Pass 100 (C2319)	No	
Revision (C2321)		
Out of Cal Standard...	No	
Marginal Tests (C23...		
Notify User Tests (C...		
Failed Tests (C2352)		
Adjustment Tests (C...		
Procedure End Time...		

Values can be modified by double clicking that element in the grid. The user is then prompted with an input screen where the new value can be entered. Once the user has entered the new value, select the Save button to save the changes.



The length of character fields is indicated by a number in parenthesis in the title bar.

The toggle button to the right of each data field in the Copy column works as a COPY button. When only one asset is being received, these buttons are not shown.

- If the toggle button is depressed (), the entered data is copied to each Asset in the Received Assets grid.
- If the toggle button is not depressed (), different data can be entered for each Asset in the grid.
- If the toggle button is not depressed and the field is left blank, data is not saved.

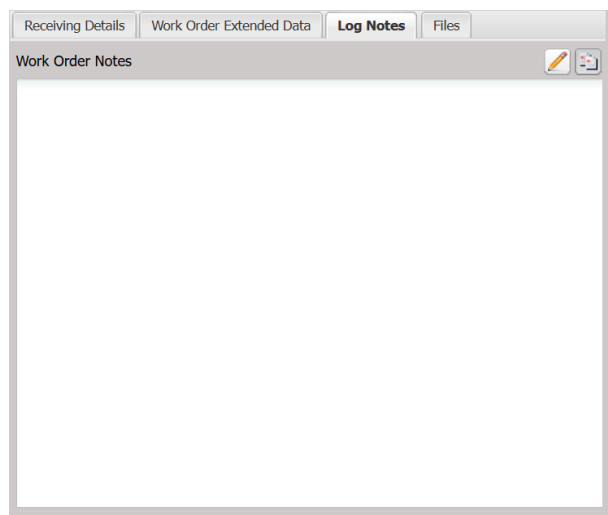
Use the “Toggle All” button above the grid to toggle the state of all the buttons in the Extended Data grid.

Receiving – Log Notes

The Log Notes is a notes block used by the receiving clerk to enter information about the Work Orders being created. This information is stored in the Work Order notes field.

Clicking the Edit button in the upper right opens the Note Editor dialog to facilitate entering lengthy notes.

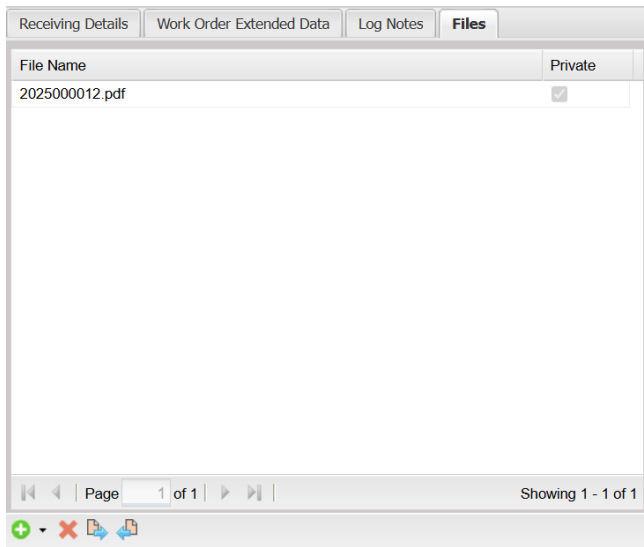
If the “copy” toggle button in the upper right hand corner is depressed, the value in the Work Order Notes field will be applied to all Work Orders. When only one asset is being received, this button is not shown.



Receiving – Files

The Files tab shows any files the receiving clerk wants to add to the work order after processing the assets. Using the bottom toolbar on the File tab, the clerk can add, remove view and edit files. From the pop-up add button the clerk can

also add a file (or attach a new file) to all assets at once. Double clicking or Right clicking a file in the grid will allow the clerk to adjust the private flag for the given file.



Work Orders

The Work Order screen is where all of the maintenance data is collected and recorded. Based upon the maintenance type, different data elements are required in order for the Work Order to be closed.

Note: Closed (History) Work Orders can be viewed by clicking the Inactive button on the Find dialog and entering the search criteria. They may also be found on the History tab on the Edit Asset screen.

At first glance, it appears there is a lot of data to be entered by the technician. However, much of the Work Order data is usually populated by the receiving process or the Asset type information. Some of the data is reference information that can be used by the technician for reference and verification purposes. The Labor/Files tab is where the technician is required to enter and record their work. This screen has been designed to provide quick data entry for the technician, while giving the technician all of the critical information needed to complete the maintenance process.

The functionality of the [Unlock](#), [Section Status](#), [Batch](#), and [Get Ambient](#) toolbar buttons and the [Export Results](#) feature is described below.

Work Order Validations

Work Orders have minimum data requirements in order for MET/TEAM to record an event. Based upon the service type, different data elements are required. Additional validations may be added by a facility, by requesting a MET/TEAM Software Administrator to add custom validations. MET/TEAM is designed to prompt the user if data elements are missing before saving the data.

Completing a Work Order

In order for MET/TEAM to return the Asset to the customer the Work Order service date and status must be **“Complete”**. Indicating to MET/TEAM that all work on the Asset for this service is complete and the can be returned to the customer. If the Asset is required to be returned prior to the service being completed, the Work Order status must still be marked **“Complete”** and the appropriate check boxes, Cancelled or Return No Maint, checked. The action of filling in the service date and tabbing out of the field causes the Due Date to be automatically calculated.

If the Work Order is assigned a *partial procedure*, all *required* components of the procedure must have been successfully executed prior to marking the Work Order as **“Complete”**. If there is a part of the procedure that has not been executed, the Work Order will not allow the status to be changed to complete.

If the “Work Order - Clear QC Approval” System Default is active, be sure to all fields and settings are correct prior to applying any signatures to the Work Order. With the exception of the Status field and Log Notes, changing any information including items such as Files, Parts, Labor, Standards, Accreditations, Results etc. after signatures have been applied will cause the removal of the signatures from the Work Order!

Work Order Asset Data

The Asset Data is all the information pertaining to the Asset itself.

Barcode	ID	Customer
SAMPLE-10	SAMPLE-10	My First Customer
Model Number	Serial Number	Department
10	10101010	
Manufacturer	Authority	Job Number
Fluke	Default	
Description		Contact Info
Multimeter		

Non-editable Asset Fields

- **Barcode** – The *unique* identifier for this Asset. No two Assets can have the same barcode. If the user attempts to enter a barcode already in the system, a warning message appears and requires the user to enter a new barcode. The barcode length is determined by the System Default “Barcode – Length”.
- **ID** – An identifier that can be used to find the Asset. This identifier is not required to be unique or the same as the barcode. We recommend that this number and the barcode be the same but it is not necessary.
 - The Asset can be viewed by selecting the Quick Link button.
- **Customer** – Indicates the owner of the Asset when the Work Order was processed.
 - The customer can be viewed by selecting the Quick Link button.
- **Model Number** – The manufacturer’s model designation of the Asset’s characteristics and capabilities.
- **Serial Number** – The manufacturer’s serial number for this Asset.
- **Department** – Indicates the department of the Asset when Work Order was processed.
 - The department can be viewed by selecting the Quick Link button.
- **Manufacturer** – The Company that created the Asset.
- **Authority** – Describes the source (ownership) of this type allowing for more than one data authority to exist.
- **Description** – The description of the Asset.

Note: The Work Order Description field is linked to the Asset Description. If the Work Order Description field is hidden, you must go to the Asset screen (the Asset Description field will not be visible), right click on any field and select the SHOW ALL. The dotted box will be displayed around the Asset Description field. Right click on the Asset Description field and select Visible. Now go to the Work Order screen and the Description field will be visible.

Editable Asset Fields

Customer My First Customer	Service Type (WO) Calibration	Status Received
Department Hoke	Administrative Lab My Lab	
Job Number	Working Lab My Lab	
Contact Info ContactInfo	WO Results Pass	

- **Service Type (WO)** – Shows the service performed which affects which validations run when saving and closing a Work Order. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
***Note:** Service Type cannot be customized. The values in this dropdown are setup using the Setup menu Services submenu screen. The order of the Service Types in the dropdown is based on which Service Type was edited last using the Setup menu Services submenu.*
- **Status** – Displays the current status of the Work Order. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
- **Job Number** – Brought forward from the receiving process, this is the job number that all expenses are charged to.
 - The job number can be changed by selecting the “...” button.
 - The job number can be viewed by selecting the Quick Link button.
- **Administrative Lab** – The lab administratively responsible for the Work Order.
 - The administrative lab can be changed by selecting the “...” button.
 - The administrative lab can be viewed by selecting the Quick Link button.
- **Working Lab** – The Lab that performed the work. This field is filled in at the time of Receiving when the Work Order is created. This field is the same as the Lab that the user who is performing the Receiving is logged into.
 - The working lab can be changed by selecting the “...” button.
 - The working lab can be viewed by selecting the Quick Link button.
- **Contact Info** - Additional information for the Work Order that may not be on the facility record or may be a one-time piece of information.
- **WO Results** – The overall status for the Work Order.
 - Determination of the overall work order result (pass/fail status)
 - If the Procedure Type (Proc) is not of type "Calibration" or "Cal/Repair", the pass/fail status on the work order is set to "Indeterminate".
 - If some or all of the work order results are "As Left" or "Found\Left" for the data condition, only these types of results are considered for the pass/fail determination.
 - If none of the results are "As Left" or "Found\Left", all work order results are evaluated to determine pass/fail.
 - If one or more work order results are "Fail", the work order is set to "Fail"
 - Else
 - If one or more work order results are "Fail Indeterminate", the work order is set to "Fail Indeterminate"
 - Else
 - If one or more work order results are "Indeterminate", the work order is set to "Indeterminate"
 - Else

- If one or more work order results are "Pass Indeterminate", the work order is set to "Pass Indeterminate"
 - Else
- If none of the previous conditions are met, the work order is set to "Pass".
- The Results are not saved as Files.

Work Order Tabs

The Work Order contains several tabs for capturing data for the service event. These tabs are: Service, Extended Data, Log Notes, Labor / Files, Standards / Accreditations, Notes, Parts, Sub Contract / Estimate, Results.

Work Order – Service Tab

The Service tab displays all the information related to the service that was performed and the procedure used.

Service		Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (71)
Required Date 04/06/2023	Priority 3	Open Date 03/25/2023	Service Date 01/06/2025	Interval 12	UOM Months	Due Date 01/06/2025			
Work Order Number 2022000022	Certification Number 2022000022	Default Procedure Test TOL_REF UUT_Indicated Rounding			<input type="checkbox"/> On Site <input checked="" type="checkbox"/> Expedite <input type="checkbox"/> Sub Contracted <input checked="" type="checkbox"/> ISO Cert <input checked="" type="checkbox"/> Cancelled <input checked="" type="checkbox"/> Received OOT <input checked="" type="checkbox"/> Return No Maint <input type="checkbox"/> Rejected <input type="checkbox"/> Optional 1 <input type="checkbox"/> Optional 2				
Sticker Type Calibration	Procedure Used Fluke 77 User Group Demonstration Procedure								
Cert Format Cal Cert w TSR.rpt	Initial Condition In Tolerance								
Assigned Tech Alan Cordner	Reason for Service Normal Cycle								
Technician System Administrator	Technician Signature			Temperature 24					
Work Area Electronic	QC Signature			Humidity Pressure 72					

- **Required Date** – Date the customer requests the Asset to be returned by. This date is brought forward from the receiving process.
- **Priority** - The priority of the Asset in service.
- **Open Date** – Date the Work Order was opened in MET/TEAM. This date is controlled by the system and cannot be changed by the user.
- **Service Date** – Date the maintenance was completed. If empty, the current date is entered when the date control button is selected.
 - The Service Date is always required except if the Cancelled, Return No Maint, or Rejected checkboxes are checked.
- **Interval** – Indicates the interval of when the next service should be performed. The interval is combined with the Asset owner's "Recall Rule" to calculate the due date.
This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **UOM** – The unit of measure for the interval.
This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Due Date** – Date the Asset is next due for this type of service.
 - If the Due Date is **empty**, this date is automatically filled in when tabbing out of the Service Date and into the Due Date **or** when a mouse click makes the cursor appear in the Due Date.

- The Due Date is only required when the Service Type Recalled checkbox is selected. This checkbox is displayed on the Service Type screen which is accessed from the Setup menu Services submenu.
- The Due Date is populated with today's date if the WO Results contains 'Fail'.
- The Due Date is populated with a calculated Due Date (Service Date plus the interval) if the WO Results contains 'Pass'.
 - If the calculated Due Date falls on a Calendar Non Workday, the Due Date is adjusted backwards to the next workday. For example, if the calculated Due Date was 8/1/2014 and 8/1/2014 has been marked in the Calendar as a Non Workday, the Due Date is recalculated to 7/31/2014.
 - The Due Date can be blank if the Cancelled, Return No Maint, or Rejected checkboxes are checked.
- **Work Order Number** – The system generated number for this Work Order. This number is unique throughout the data and is used to track all information about this Work Order.
- **Certification Number** – The certificate number for the calibration. If left blank, the Work Order number is used. To print or export a certificate of calibration, use the Cert button on the toolbar.
- **Sticker Type** – The type of sticker placed on the Asset after the service is complete. To add notes for stickers such as "Special Cal" setup a Quick Note.
 - The sticker can be edited/viewed by selecting the Quick Link button.
 - The sticker can be printed by selecting the Print button.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Cert Format** – Can contain the report file name for this calibration. This field must be set prior to closing the work order. Once the work order is closed this cannot be changed.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Assigned Tech** – The technician assigned to do the service.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Technician** – The technician of record for this service event.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Work Area** – The area of the lab where the service is being performed. Brought forward from the receiving process.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Default Procedure** – The name the procedure recommended for this type of service. The default procedure is pre-filled from the procedure associated with the Asset type.
 - The default procedure can be viewed by selecting the Quick Link button.
- **Procedure Used** - The name of the procedure the technician used for this Work Order. If the calibration was performed by MET/CAL® this is automatically populated.
 - The procedure can be changed by selecting the "..." button. The Find Procedure screen is displayed.

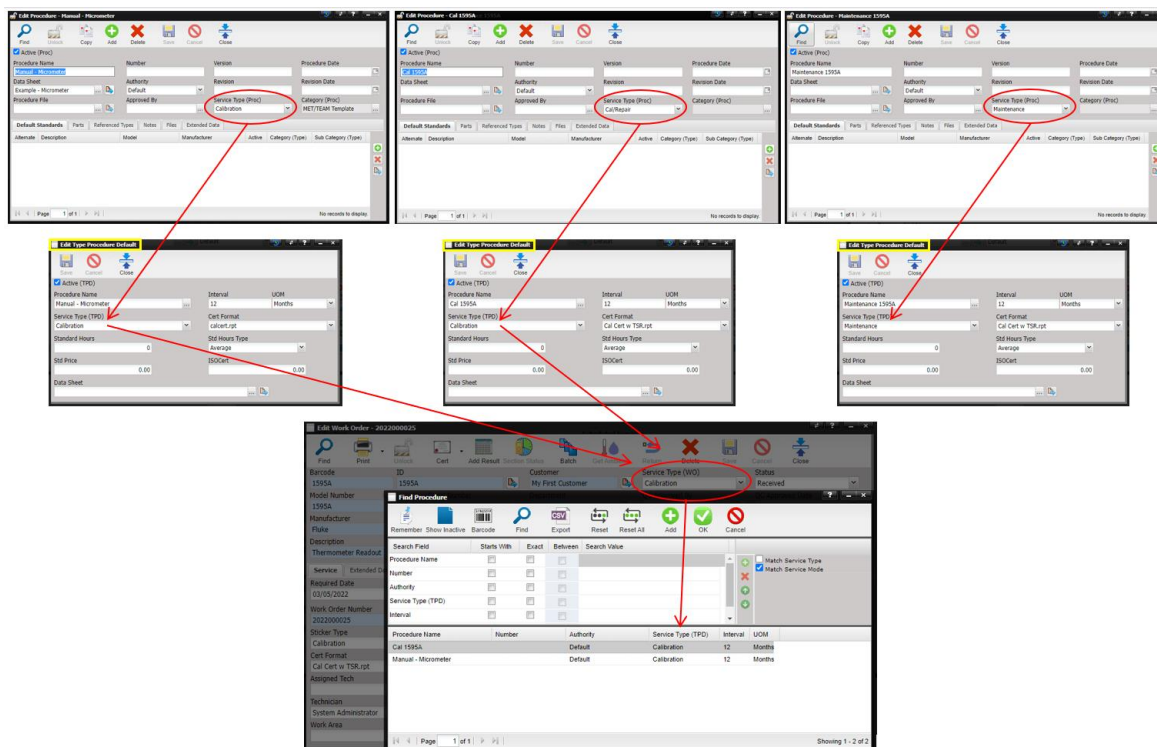
Search Field	Starts With	Exact	Between	Search Value
Procedure Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Authority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Service Type (TPD)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Interval	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Procedure Name	Number	Authority	Service Type (TPD)	Interval	UOM
1594 MET/CAL Proc		Default	Calibration		Months
1594A Manual		Default	Calibration		Months

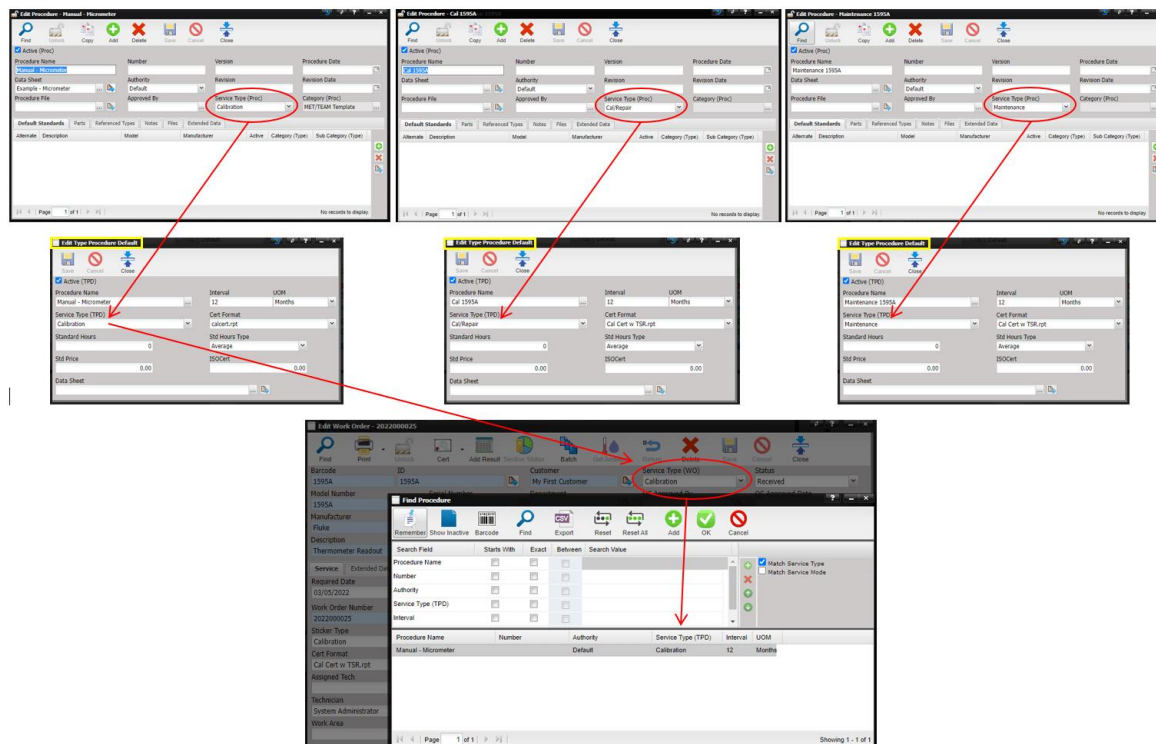
There are two check boxes on the right hand side of the search grid.

- Match Service Mode** – (default) – When checked, the find procedure results are filtered so that only procedures that have a Service Type (Proc) value's Service Mode matching the Work Orders Service Type (WO) value's Service Mode.

- **Match Service Type** – (default) – When checked, the find procedure results are filtered so that only procedures that have a Service Type (Proc) value exactly match the Work Orders Service Type (WO) value. (Service Mode values are not evaluated.)



If the Service Type (TPD) on the Cal1595A procedure is changed to Cal/Repair, it now longer shows up in the find with *Match Service Type* checked on the Find screen.



- The procedure can be viewed by selecting the Quick Link button.

- **Initial Condition**-The condition the Asset was in when received.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Reason for Service**-The reason the Asset is in for service.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **On Site** – Indicates the service was done or needs to be done on site.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Expedite** – Indicates the Asset needs to be expedited through the service process.

- **Sub Contracted** – Indicates this service should be subcontracted.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **ISOCert** – Indicates the Asset requires an ISO or Accredited certificate.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Cancelled** – The Service Facility cancelled this Work Order.

- When checked, the Due Date can be left blank.
- If MET/CAL successfully completes a procedure, the Cancelled box is unchecked.
- If a MET/CAL procedure is terminated but the user **does not** terminate the Post Prompt dialog, the Cancelled box is checked.
- If a MET/CAL procedure is terminated and the user **does** terminates the Post Prompt dialog the WO is not updated and the Cancelled box is not modified.

- If there is no Post Prompt dialog there is no ability to cancel completely before the WO is updated. In this case, the Cancelled box is always checked when a procedure terminates.
- During Returning, if checked, the Asset's Scheduled Service information **will not** be modified.

Example: The Service Facility does not have the capability to perform the service; therefore is cancelling the Work Order and retuning the Asset to the Customer as is, without action.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Received OOT** – Indicates that an Out of Tolerance condition exists with this Asset. If MET/TEAM data points are utilized, MET/TEAM automatically determines if an Out of Tolerance Condition Exists. Any Out of Tolerance condition causes MET/TEAM to automatically record the reading into the Out of Tolerance memo field and the Received OOT checkbox is selected. If other processes are used, the user can manually check this box.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Return No Maint** – Indicates the Asset owner has requested the Service Facility to close the Work Order and have the Asset returned with no maintenance being performed.
 - When checked, the Due Date can be left blank.
 - During Returning, if checked, the Asset's Scheduled Service information **will not** be modified.

Example: The Owner has accidentally or unintentionally sent the asset in for service and wishes it returned as is, without maintenance action being performed.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

- **Rejected** – Indicates that as a result of this Work Order, the Asset has been rejected.
 - When checked, the Due Date can be left blank.

Example: The Service Facility has performed or attempted to perform the service and has found the Asset is damaged and is beyond economical repair. The Service Facility marks the Rejected checkbox, indicating the Asset is being "Rejected" as a result of this Work Order.

This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.

Note: If further data processing for the rejected Asset is desired, using a data check in the returning page is recommended. (Data Checks are not applicable for MET/TEAM Express.)

- **Optional1 / Optional2** – Customizable indicator flags, adjust the heading via the context menu. No business logic in MET/TEAM.
- **Temperature** – The atmospheric temperature at the time the service was performed. For MET/CAL users, this field can be auto-populated using the Get Ambient button. This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Humidity** – The atmospheric humidity at the time the service was performed. For MET/CAL users, this field can be auto-populated using the Get Ambient button. This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Pressure** – The barometric pressure at the time the service was performed. This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.
- **Technician Signature** – This button can be used to apply or remove the Technician Approver's digital signature. The signee's name and date/time stamp will appear to the right of the button.

- **QC Signature** – This button can be used to apply or remove the QC Approver’s digital signature. The signee’s name and date/time stamp will appear to the right of the button.

Digitally Signing a Work Order

Using the Technician Signature and QC Signature buttons, a Work Order can have “digital signatures” applied, which is an indication that the settings and results associated with this Work Order have been reviewed and approved by the signing person. This is an optional process that meets the requirements for 21 CFR Part 11 compliance. When necessary or desired, this process can be made a mandatory by using Data Checks.

When applying digital signatures to a Work Order, a few rules apply:

- The Technician Signature must be applied first.
- The QC Signature can only be applied after the Technician Signature.
- Updating or removing the Technician Signature will clear the QC Signature.

When the System Default “Work Order - Clear QC Approval” is active:

- Changing any fields on the Work Order (with the exception of the Status field and Log Notes) or adding, editing or deleting items such as Parts, Labor, Files, Standards, Accreditations, or Results will cause signatures to be cleared. Make sure all of these items are complete and set properly before applying signatures.
- Unlocking a closed Work Order and changing any field will cause all signatures to be removed from the Work Order.

When the System Default “Auditing” is...

- ...active, the User Name field on the signature prompt must be entered manually.
- ...not active, the User Name field on the signature prompt is automatically populated.

Signatures can be applied to Work Orders using the Batch Change feature. All rules outlined above are enforced through the Batch Change process.

Work Order – Extended Data Tab

The Extended Data tab displays the extended data elements for Work Order. The data in the text fields on the right are brought forward from the receiving process.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (0)																								
Closed Date <input type="text"/>		Invoice Number <input type="text"/>		EX Data <table border="1"> <thead> <tr> <th>Property</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>TUR Limit (C2315)</td> <td>56.00</td> </tr> <tr> <td>OOT Limit (C2317)</td> <td>9.00</td> </tr> <tr> <td>Tolerance Referenc...</td> <td></td> </tr> <tr> <td>Pass 100 (C2319)</td> <td>No</td> </tr> <tr> <td>Revision (C2321)</td> <td></td> </tr> <tr> <td>Out of Cal Standard...</td> <td>No</td> </tr> <tr> <td>Marginal Tests (C23...</td> <td></td> </tr> <tr> <td>Notify User Tests (C...</td> <td></td> </tr> <tr> <td>Failed Tests (C2352)</td> <td></td> </tr> <tr> <td>Adjustment Tests (C...</td> <td></td> </tr> <tr> <td>Procedure End Time...</td> <td></td> </tr> </tbody> </table>					Property	Value	TUR Limit (C2315)	56.00	OOT Limit (C2317)	9.00	Tolerance Referenc...		Pass 100 (C2319)	No	Revision (C2321)		Out of Cal Standard...	No	Marginal Tests (C23...		Notify User Tests (C...		Failed Tests (C2352)		Adjustment Tests (C...		Procedure End Time...	
Property	Value																															
TUR Limit (C2315)	56.00																															
OOT Limit (C2317)	9.00																															
Tolerance Referenc...																																
Pass 100 (C2319)	No																															
Revision (C2321)																																
Out of Cal Standard...	No																															
Marginal Tests (C23...																																
Notify User Tests (C...																																
Failed Tests (C2352)																																
Adjustment Tests (C...																																
Procedure End Time...																																
Cost <input type="text"/> 0.00		Returned By <input type="text"/>																														
Category (WO) <input type="text"/> ...		Returned Date <input type="text"/>																														
Sub Category (WO) <input type="text"/> ...		Returned To <input type="text"/>																														
Quantity <input type="text"/> 1																																
Group <input type="text"/> 1ea8cbbe-4197-4b2e-8578-7a19f4efd05c																																

- **Closed Date** – The date the Work Order was closed. This date is controlled by the Workflow Returning process and cannot be edited by the user.

- **Invoice Number** –Displays the Invoice number this Work Order was billed on.
 - The invoice can be viewed by selecting the Quick Link button.
 - The invoice can be printed by selecting the Print button.

Note: *On the Work Order Extended Data tab, the Invoice Number field is linked to the Invoice Number field on the Invoice screen. If the Invoice Number field on the Work Order Extended Data tab is hidden, you must go to the Invoice screen, right click on any field and select SHOW ALL. The dotted box will be displayed around the Invoice Number field. Right click on the Invoice Number field and select Visible. Now go to the Work Order Extended Data tab and the Invoice Number field will be visible.*
- **Cost** – The cost of the service. This cost is calculated by the Workflow Returning process.
- **Returned By** – Displays the name of the person who performed the Workflow Returning process. This date is filled in automatically by the returning process. Selecting the printer icon re-prints the shipping manifest for this Asset.
- **Returned Date** - Displays the date the Asset was returned to the customer. This date is controlled by the Workflow Returning process and cannot be edited by the user.
- **Category (WO)** –The category of the labor (not required). *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
 - The category can be changed by selecting the “...” button.
 - The category can be viewed by selecting the Quick Link button.
- **Sub Category (WO)** – The subcategory of the labor (not required). *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
 - The sub category can be changed by selecting the “...” button.
 - The sub category can be viewed by selecting the Quick Link button.
- **Quantity** – The quantity of items being serviced in the Work Order. Defaults to 1. If you are servicing sets, this quantity could be greater than 1. This quantity is used as the multiplier for the cost if there are no labor hours on the Labor/Files tab. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
- **Group** – Displays a read-only value for the Group UID, which is the unique identifier assigned when the asset(s) were received.
- **EX Data** - The data in the grid can be modified by highlighting the element to be changed and double clicking that element. Once the new value has entered, select the Save button to save the changes.

Work Order – Log Notes Tab

The Log Notes tab displays all the activity logged against an Asset.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results
Date	Status	Location	Note	First	Last			
09/24/2015 15:47	Received	AMF-10	Inspecting instrument	Ed	Wadagnolo			

The log is read from top to bottom with the newest event being at the top. Most of the log events are entered in by the user. However, some events, such as “Out of Tolerance” are automatically entered in the log as well.

The Log Notes are updated on each Work Order when the Batch button is used. See the section Batch (Work Orders) for more information.

Adding / Deleting / Modifying a Log Note

To add a log note, select the “+” button at the bottom of the screen, select the status, complete the log event screen, then select the Save button.

- **Status** – The status of the Work Order.
- **Date** – Date the log event was created. This date is controlled by MET/TEAM and cannot be edited.
- **Location** – The physical location of Asset.
- **Log Note** – General notes for this log event.
- **User** – Name of the technician creating the log event. The system defaults it to the currently logged on user.
 - The user can be changed by selecting the “...” button.

To remove a log note, highlight the record to delete and select the “X” button at the bottom of the Log Notes tab.

To modify or view a log note, highlight or double click the log note and select the Quick Link button at the bottom of the Log Notes tab.

Work Order – Labor/Files Tab

The Labor / Files tab is for recording labor expended on the Work Order (left side of the tab) and for attaching files related to the Work Order.

Labor			Files					
Date	Time	Initials	File Name	Cert	Cert Export	Current Cert	Private	Active
			2017000029.pdf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			2017000029.xls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			IMG_4223.jpg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Adding / Deleting / Modifying a Labor Record

Labor and Files are entered by the user. Labor records are also created by MET/CAL when a calibration is performed. Labor records created by MET/CAL use the calibration start date as the labor record start date, and the duration is the amount of time it took for the MET/CAL procedure to run. If the running time is greater than 24 hours, multiple labor records are created to reflect this. Labor records created by MET/CAL do not have the “No Charge” checkbox selected.

The Labor is updated on each Work Order when the Batch button is used. See the section Batch (Work Orders) for more information.

To add a labor record, select the “+” button at the bottom of the screen, complete the information on the [Labor screen](#) and select the Close button.

To remove a labor record, highlight the record to delete and select the “X” delete button at the bottom of the Labor/Files tab.

To modify or view a labor record, highlight or double click the labor record and select the Quick Link button at the bottom of the Labor/Files tab.

Work Order Files

Any type of file may be linked to a Work Order using this feature. However, there are certain files that are treated with special handling.

Certificate “Merge” File

If you link a PDF file where the file name matches the Work Order number and ends with “_merge.pdf” (case-insensitive) and it is marked as Active, this file will be appended to the end of the certificate when the certificate PDF file is created upon closing a Work Order or when saving a previously closed Work Order that has been unlocked. This file will not be appended to the end of a certificate that is created by clicking the Cert button on an open Work Order.

For example, if the Work Order number is 202100123 and I link a file named “202100123_merge.pdf” to the Work Order, the contents of this file will be appended to the end of the certificate PDF file.

This process is also dependent on the states and values of the “Work Order – Revision Tracking” and “Work Order – Cert Creation” system defaults.

MET/TEAM only allows one merge file that matches the Work Order number to be linked to a Work Order. Attempting to add a second merge file with the same name will overwrite the previous file, if you choose to do so. Linking files that end in “_merge.pdf” but do not match the Work Order number, or merge files with the correct name that are not marked as Active, are ignored when the certificate PDF file is created.

Procedures

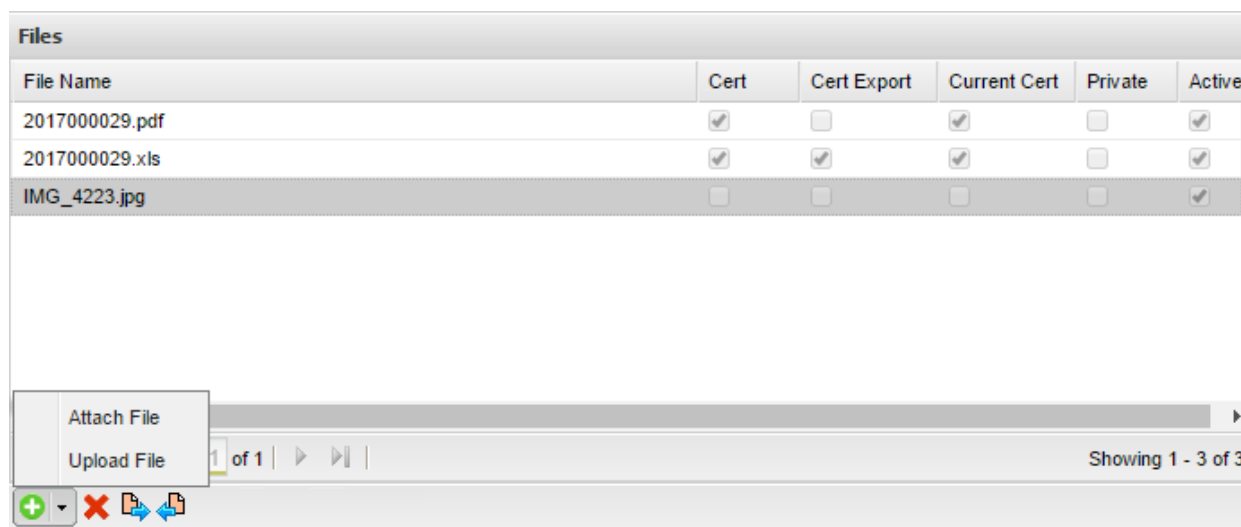
When adding results to the Work Order using a Procedure that consists of an Excel spreadsheet or similar file, uploading the file to the Work Order adds the file to the Files list as opposed to adding it to the Results list.

Adding a File

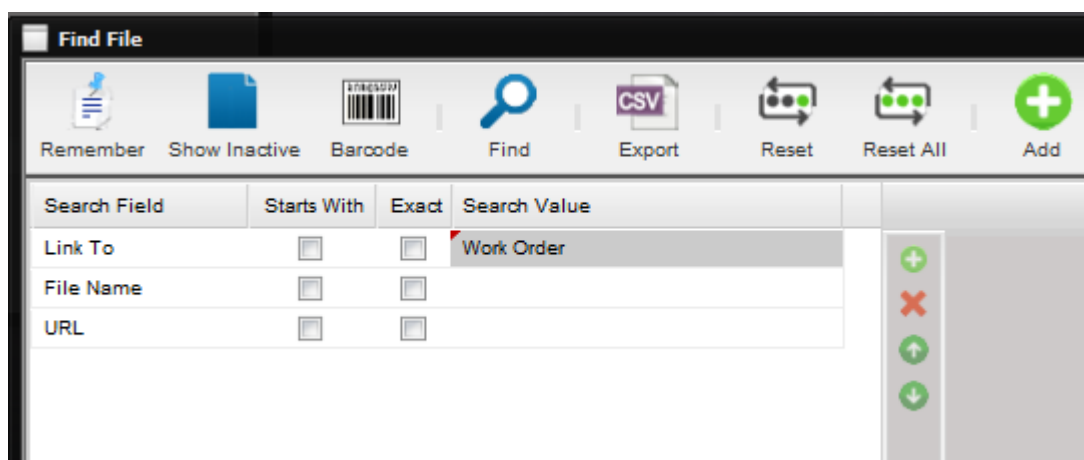
The Files half of the Labor / Files tab displays files related to the Work Order. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons below the grid can be used to add, delete, edit or view files.

Note: MET/TEAM can only upload files that are 50mb or smaller.

When the “+” button is selected, the user is presented with two options: Attach File or Upload File.

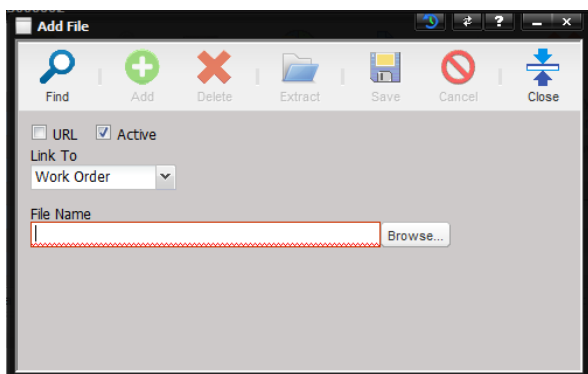


To attach an existing file to a Work Order, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the ‘Link To’ search field contains the search value of “Work Order”. Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a ‘Link To’ entry of “Work Order”. Select the file to attach from the results grid and press OK.



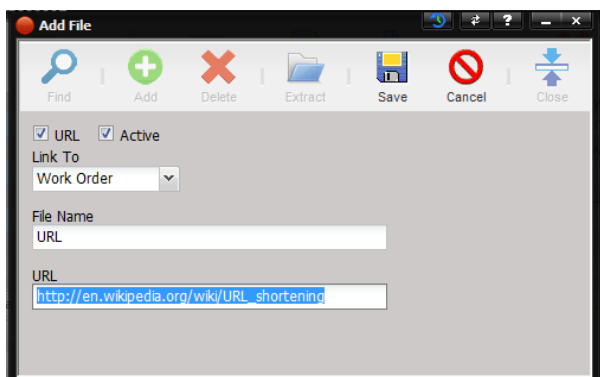
To attach a new file or URL to a Work Order, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Work Order. The Add File screen is displayed. Notice the ‘Link To’ field contains the value of “Work Order”.

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the “Browse...” button.



The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Work Orders Files tab.

- To enter a URL, check the URL checkbox check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.



Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Procedure Files tab.

Files					
File Name	Cert	Cert Export	Current Cert	Private	Active
2017000029.pdf	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2017000029.xls	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Fluke Website	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
IMG_4223.jpg	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select “X” button on the right of the Labor / Files tab.

Editing a File

To edit the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) that points to the right.

Viewing a File

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) that points to the left.

Changing Private Status of a File

The Private column in the Files grid indicates whether a file is private (cannot be seen or accessed in Customer Portal) or public (can be seen and accessed in Customer Portal). To change the Private status of a file, right-click the File Name in the grid (not the checkbox) and choose Make Private or Make Public from the popup menu accordingly. Also, double-clicking the File Name will display the same popup menu.

Cert, Cert Export, Current Cert

The Cert, Cert Export, and Current Cert column checkboxes are set by the application when the Work Order is Returned. Upon returning the Work Order, the Cert information is captured and saved as a .pdf or an .xls. See the [System Default Work Order – Cert Creation](#) for additional information on the available options.

- Cert column indicates that the file in this row is a Cert in .pdf format.
- Cert Export indicates that the file in this row is a Cert in .xls format.
- Current Cert indicates that the file in this row is the cert that is printed from the Cert button on the Work Order toolbar. A file can be changed to Current Cert status by right clicking or double-clicking on the File Name (not the checkbox) and choosing Set Current. A file can be changed from Current Cert status by right clicking or double-clicking on the File Name and choosing Clear Current. Only one file of each type can be set a Current Cert.

Work Order – Standards / Accreditations Tab

The Standards/ Accreditations tab is for recording standards and accreditations associated with the Work Order. *This Standards and Accreditations are updated on each Work Order when the Batch button is used. See the section Batch (Work Orders) for more information.*

Standards						Accreditations		
Barcode	ID	Serial Number	Model Number	Due Date	Service Date	Number	Name	Type

Page 1 of 1

No records to display.

Page 1 of 1

No records to display.

Standards Only | + - RT FT

+ -

Adding / Deleting / Modifying Accreditations

To add an accreditation, select the “+” button beneath the accreditations grid. The Select Accreditations screen is displayed to select one or more accreditations to add.

To remove an accreditation, highlight the record and select the “X” button beneath the Accreditations grid.

To modify or view an, highlight the accreditation and select the Quick Link button beneath the Accreditations grid.

Adding / Deleting / Modifying Standards

To add a standard, select the “+” button beneath the Standards grid. The Select Standards screen is displayed for selecting one or more standards.

- On Select Standards screen, if the Associated Lab is checked, only standards that have the same Assigned Facility as the current logged in facility are shown.
- If a standard is selected that is not currently in calibration, the user is warned that the selected standard is out of calibration. However, it does not stop the technician from selecting the standard.
- When adding a standard, MET/TEAM examines the Asset Services associated with the selected Asset and uses the underlying service and due date. If, however, there is not a suitable Asset Service, MET/TEAM examines all associated Work Orders with a Service Mode "Calibration". Once the most recent Work Order is found, the service and due date from that record get recorded in the Standards grid.

To remove a standard, highlight the standard and select the “X” button beneath the Standards grid.

To modify or view a standard, highlight the standard and select the Quick Link button beneath the Standards grid.

To swap a standard listed in the grid with another one, press the Swap Standard button.

The screenshot shows the 'Standards / Accreditations' tab in the software interface. The grid displays a list of standards with columns for Barcode, ID, Serial Number, Model Number, Due Date, and Service Date. The 'My 5700' standard is highlighted. Below the grid, there are buttons for 'Standards Only', '+', 'X', and a magnifying glass, along with 'RT' and 'FT' buttons. To the right, the 'Swap Standard' dialog box is open, showing options to 'Save', 'Cancel', or 'Close'. It includes a checkbox for 'Active', a 'Call Sheet' field with the value '2022000297', and an 'Asset' dropdown menu currently showing 'My 5700'.

Press the Ellipsis button, select a standard from the Find results grid and press the Save button.

The links between the work order results records and the swapped standard will be updated automatically.

Reverse Traceability / Forward Traceability

The “RT” button at the bottom of the screen displays a reverse traceability report for the current Work Order. All Assets calibrated using this standard are displayed in a Crystal Report.

The “FT” button at the bottom of the screen displays a forward traceability report for the current Work Order. All Assets used to calibrate this Asset are displayed in a Crystal Report.

Note: Assets requiring no calibration must have a record in the Asset ‘Scheduled Services’ grid with an Service Type and Service Mode of ‘Calibration’, interval of ‘0’ and an Interval UOM of ‘None’, for that Asset to show up on the Traceability reports.

Work Order – Notes Tab

The Notes tab allows selecting predefined blocks of text to be inserted for Accuracy, Uncertainty, Out of Tolerance, and General Notes. To enter information, double click in the area or press ALT+Q. For additional details on entering notes, refer to the [Quick Notes](#) section.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results
Accuracy Notes		Uncertainty Notes		Out of Tolerance Notes		Work Order Notes		
						These are test results		

Accuracy Notes – Provides the technician with the ability to record the accuracy statement for this service event. By default, this information is displayed on the certificate of calibration. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*

Uncertainty Notes – A place to enter uncertainty notes for the Work Order. If uncertainty notes were entered on the Asset screen, they are brought forward but can be overwritten if necessary. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*

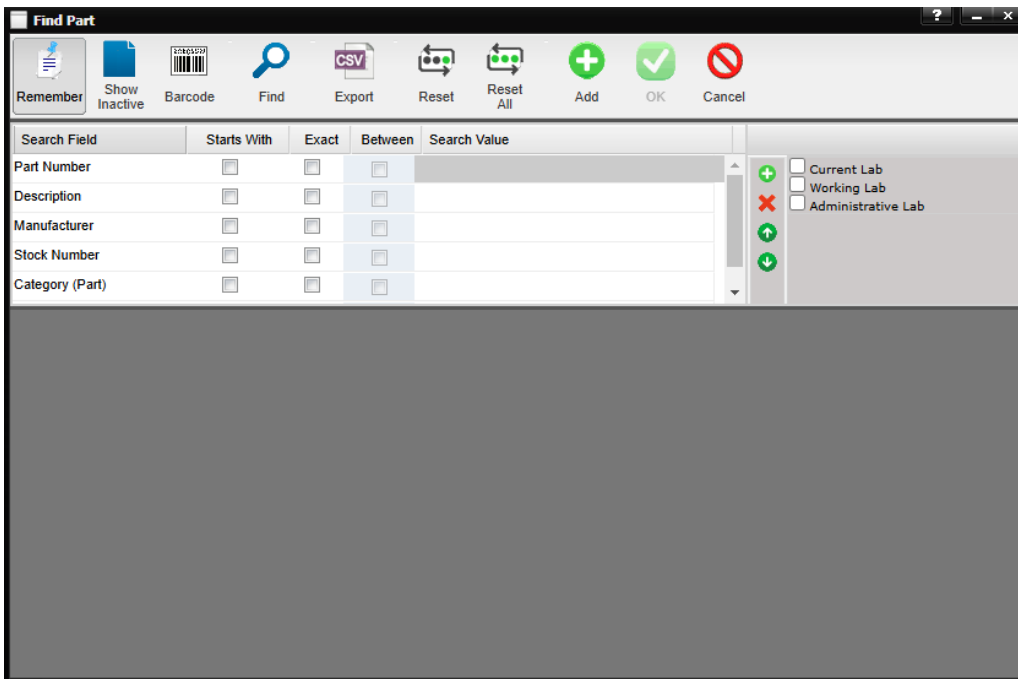
Out of Tolerance Notes – Provides the technician with the ability to record out of tolerance conditions that may have existed during this service event. If a Data Sheet is used, MET/TEAM automatically records the out of tolerance information and stores the text of the event in this area. This information is used to produce an out-of-tolerance report to the customer. If an out of tolerance condition exists, this data must exist before an out of tolerance report prints. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*

Work Order Notes – Provides the technician with an area to record notes for this service event. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*

Work Order – Parts Tab

The Parts tab is for tracking parts used during the service performed on this Work Order.

When the Find Part screen is displayed from the Parts tab, three checkboxes are available to assist filtering the search results.



- If Current Lab, Working Lab, and Administrative Lab are not checked, the Find screen grid is populated with all parts for the set criteria.
- If Current Lab is checked, the search results are filtered to parts with a Storage Lab that matches the logged in Facility.
- If Working Lab is checked, the search results are filtered to parts with a Storage Lab that matches the work orders Working Lab.
- If Administrative Lab is checked, the search results are filtered to parts with a Storage Lab that matches the work orders Administrative Lab.
- More than one checkbox can be checked to filter on multiple criteria.

Adding /Deleting / Modifying a Part

To add a part, select the “+” button at the bottom of the screen, complete the parts screen, and select Save button.

- **Used Date** – Date the part was used on this Asset.
- **Quantity** – Quantity of parts used.
- **Job Number** – The job number this labor is charged to (pre-filled with the Work Order job number)
 - The job number can be changed by selecting the “...” button.
- **Cost** – Cost of each part.
- **Part Information**
 - **Part Number** – Manufacturer’s part number.
 - **Description** – Manufacturer’s description of the part.
 - **Manufacturer** – Company who manufactured the part.
 - **Stock Number** – Supply system ordering number.
 - **Storage Lab** – Storage Lab for the part.

To remove a Part and delete the Part Link, highlight the record to be deleted and select the “X” button at the bottom of the Parts tab.

The Part Link is the record that links the Part to the Work Order. To modify or view the selected Part Link, highlight or double click the part and select the 1st Quick Link button at the bottom of the Parts tab.

To modify or view the information pertaining to the Part itself, highlight or double click the part and select the 2nd Quick Link button at the bottom of the Parts tab.

Work Order – Sub Contract / Estimate Tab

The Sub Contract / Estimate tab is for recording information related to sub contracting this Work Order. In the event a maintenance facility does not have the equipment, skill, or personnel to perform the needed service, the Work Order can be subcontracted to an authorized subcontracting facility.

- **Sub Contractor** – The Facility assigned to perform the sub contracted service, only authorized Sub Contractors are displayed to the technician. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
 - The sub contractor can be changed by selecting the “...” button.
 - The sub contractor can be viewed by selecting the Quick Link button.
- **Sub Cont Cost** – The cost the lab passes on to the customer. Included in the cost of the Work Order, when applied to the invoice. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
- **Sub Cont Lab Cost** – The cost to the lab. For example, the lab may have sent an item to sub contractor and paid \$50 for the service, however they bill the customer \$100 for processing etc. In this example \$50 in “Sub Cont Lab Cost”, \$100 in “Sub Cont Cost”. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
- **Sub Cont Hours** – The number of hours the sub contractor took to perform the service. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*
- **Delay Date** – The date the item shipped to the sub contractor.
- **Sub Contractor Notes** – Notes sent to the sub contractor concerning the service. *This field can be changed on multiple Work Orders when the Batch button is used. See the section Batch (Work Orders) for more information.*







It is a best business practice to always open a Work Order even if you know ahead of time the Asset will be sent to a subcontractor. This way, you will have a historical record of the event.

Work Order – Results Tab

The Results tab is used to display calibration data associated with the given Work Order. This data is saved in the database as results/points. This data is not saved as individual files. When a file (such as an Excel or .PDF file) is used as the Procedure, the results grid on the Results tab will be empty.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (1)	
Date ▼	Procedure Name	Description	Status	Data Origin	Data Condition	Run At Facility	User Name		
02/03/2023 01:08	Z540.3 Report	MET/CAL Results	Fail	MET/CAL	As Found	My Lab	Admin		

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The fields in the grid show information regarding a calibration event:

- **Date** – This is the date the calibration was first created.
- **Procedure Name** – Name of the MET/TEAM Procedure that was executed.
 - When a sectioned procedure is executed, each section of the same procedure is displayed in their own row of the Results grid.
- **Description** – Description of the data collected. The field varies with the procedure used to collect the data.
 - MET/CAL Procedure
 - Manual Template
 - When using a MET/CAL Sectioned Procedure, the Description field is the name of the procedure section.
- **Status** – The overall pass/fail status of the calibration event.
- **Data Origin** – The origin of the data.
 - MET/TEAM
 - MET/CAL
 - Other file types are not listed in the Results grid. These files are attached as the Data Sheet on the Service tab or as an independent file on the Files tab.
- **Data Condition** – The As Found, As Left, or Found Left data condition for a given calibration event.
- **Run At Facility** – The Facility where the data was collected.
- **User Name** – The user who collected the data.

Add or Delete Work Order Results, View Results, Edit Manual Calibration, Export Results, COMPASS Data File Import, MET/TEMP II Data File Import, and Cubyt Data File Import Buttons

To Add, Delete, View, Edit, Export Results, do a COMPASS, MET/TEMP II, or Cubyt Data File Import, use the buttons at the bottom left corner of the Results tab.



Add Work Order Results

The “+” button opens the Find Procedure screen for selecting a procedure associated with the Type of this Asset and then performs a calibration using the selected procedure. To perform a calibration using the procedure selected in the Procedure Used field, use the Add Result button on the main toolbar.



Note: The functionality of the “+” button is affected by the System Default “Work Order – Use Multiple Procedures”

The Find Procedure screen is displayed. The checkboxes [Match Service Mode](#) and [Match Service Type](#) on the Find Procedure screen behave as described in the Work Order Service tab.

The “+” button functions based on the following logic.

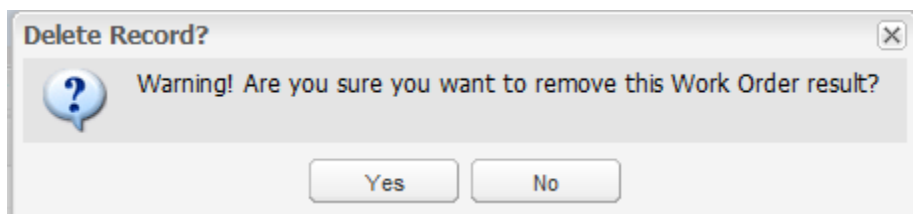
- Looks at the Type Procedure Default associated with the Asset Type.
- Checks if there is an associated Data Sheet.
- If there is no Data Sheet, looks at the actual Procedure associated with the Asset Type.
- Check if there is an associated Data sheet.
- If a Data sheet is found, MET/TEAM looks at the method of calibration.
 - If the Data sheet is a Manual Template, the Manual Template Calibration screen is opened.
 - If the Data sheet is a MET/CAL Procedure, MET/CAL is launched and proceeds through the actual MET/CAL procedure.
 - If the Data sheet is a spreadsheet or other type of file, the Select Data Sheet Option dialog is displayed. See the Add Result section below for more details.

Delete Work Order Results

To remove a selected row of calibration data, highlight the row and select the “X” button.



A prompt is displayed.



If Yes is selected, MET/TEAM removes the calibration data from the Work Order.

If a standard was added to the work order for this set of results and it is not referenced by any other set of results on the same work order, it will be removed as well.

Note: The automatic removal of standards only works for procedures that were run with a version of MET/CAL that supports this feature and is not backward compatible. Manual standards and user configured instruments are not supported.

To delete a point from the Work Order results, double click the work order result on the Results tab. On the data viewer screen that is presented, highlight the point to delete and press the Delete button the toolbar.

Note: The pass/fail determination for the work order result the point belonged to is not re-run at the time of deleting a point.

View Results

Data points collected during a calibration event (manual or MET/CAL) can be viewed by highlighting the row and selecting the Quick Link button with the blue arrow pointing to the right. If the highlighted row references a File, the user must use the Data Sheet field Quick Link button on the Service tab to view the collected data.



The View Results screen is displayed.

View Results 2021000075-MET/CAL Results

MET/CAL Results | MET/CAL Classic | Meas Uncertainty | Procedure Steps | Full Data | COMPASS Data | MET/TEMP II Data | Extended Data | Edit | Close

Description: MET/CAL Results | Date: 04/01/2021 | Procedure: Z540.3 Report | Technician: System Administrator | Status: Fail | Notes:

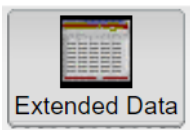
Failed: 8 | Ordinal: 1 | Data Origin: MET/CAL | Run At Facility: My Lab | Workstation Name: PC-AMF-11HL5M2 | Data Condition:

RESULT	No.	RANGE	DUT Indicated	System Actual	C	MODIFIER	Error	%TOL
	0001-007							
✗	0001-012		0.9501 A	1.00000 A			-0.04990 A	166 %
✗ ?	0002-005		0.9651 A	1.00000 A			-0.03490 A	116 %
✓	0003-005		0.9701 A	1.00000 A			-0.02990 A	100 %
✓	0004-005		0.9901 A	1.00000 A			-0.00990 A	33 %
✓	0005-005		1.0101 A	1.00000 A			0.01011 A	34 %
✓ ?	0006-009		1.0291 A	1.00000 A			0.02911 A	97 %
✗ ?	0007-005		1.0301 A	1.00000 A			0.03011 A	100 %
✗	0008-005		1.0401 A	1.00000 A			0.04011 A	134 %
	0009-005							
✗	0009-010		0.9501 A	1.00000 A			-0.04990 A	166 %
✗	0010-005		0.9651 A	1.00000 A			-0.03490 A	116 %
✓ ?	0011-005		0.9701 A	1.00000 A			-0.02990 A	100 %
✓	0012-005		0.9901 A	1.00000 A			-0.00990 A	33 %
✓	0013-005		1.0101 A	1.00000 A			0.01011 A	34 %
✓ ?	0014-009		1.0291 A	1.00000 A			0.02911 A	97 %
✗ ?	0015-005		1.0301 A	1.00000 A			0.03011 A	100 %
✗	0016-005		1.0401 A	1.00000 A			0.04011 A	134 %

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The data can be viewed in different ways by using the MET/CAL Results, MET/CAL Classic, Meas Uncertainty, Procedure Steps, Full Data, COMPASS Data and MET/TEMP II Data buttons in the tool bar.

You can Edit, Copy, or Delete individual records.



The Extended Data button shows the extended data of the work order result record (one record). This data is populated when performing COMPASS or MET/TEMP II imports.

Description: MET/CAL Results | Date: 03/07/2023 | Procedure: MET/TEMP II Import | Technician: System Administrator | Status: Fail | Notes:

Failed: 64 | Ordinal: 15 | Data Origin: MET/CAL | Run At Facility: My Lab | Workstation Name: | Data Condition:

nField001	nField002	nField003	nField004	nField005	nField006	nField007	nField008	nField009	nField010	nField011	nField012	nField013	nField014	nField015	nField016	nField017
100.235	0.00385675	1.4200														

You can Edit the record.

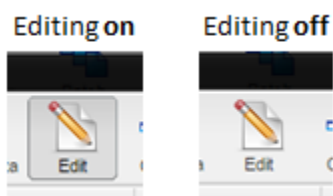
The number of failed tests in a results set is displayed in the header section. This includes both Failed and Failed Indeterminate results.

Description MET/CAL Results	Date 04/01/2021	Procedure Z540.3 Report	Technician System Administrator	Status Fail	Notes
Failed 8	Ordinal 1	Data Origin MET/CAL	Run At Facility My Lab	Workstation Name PC-AMF-11HL5M2	Data Condition

RESULT	No.	RANGE	DUT Indicated	System Actual	C	MODIFIER	Error	%TOL
	0001-007				<input type="checkbox"/>			
✗	0001-012		0.9501 A	1.00000 A	<input type="checkbox"/>		-0.04990 A	166 %
✗ ?	0002-005		0.9651 A	1.00000 A	<input type="checkbox"/>		-0.03490 A	116 %
✓ ?	0003-005		0.9701 A	1.00000 A	<input type="checkbox"/>		-0.02990 A	100 %
✓	0004-005		0.9901 A	1.00000 A	<input type="checkbox"/>		-0.00990 A	33 %
✓	0005-005		1.0101 A	1.00000 A	<input type="checkbox"/>		0.01011 A	34 %
✓ ?	0006-009		1.0291 A	1.00000 A	<input type="checkbox"/>		0.02911 A	97 %
✗ ?	0007-005		1.0301 A	1.00000 A	<input type="checkbox"/>		0.03011 A	100 %
✗	0008-005		1.0401 A	1.00000 A	<input type="checkbox"/>		0.04011 A	134 %
	0009-005				<input type="checkbox"/>			
✗	0009-010		0.9501 A	1.00000 A	<input type="checkbox"/>		-0.04990 A	166 %
✗	0010-005		0.9651 A	1.00000 A	<input type="checkbox"/>		-0.03490 A	116 %
✓ ?	0011-005		0.9701 A	1.00000 A	<input type="checkbox"/>		-0.02990 A	100 %
✓	0012-005		0.9901 A	1.00000 A	<input type="checkbox"/>		-0.00990 A	33 %
✓	0013-005		1.0101 A	1.00000 A	<input type="checkbox"/>		0.01011 A	34 %
✓ ?	0014-009		1.0291 A	1.00000 A	<input type="checkbox"/>		0.02911 A	97 %
✗ ?	0015-005		1.0301 A	1.00000 A	<input type="checkbox"/>		0.03011 A	100 %
✗	0016-005		1.0401 A	1.00000 A	<input type="checkbox"/>		0.04011 A	134 %

The Status, Data Condition, and Notes fields on the Work Order results record are editable. By default, only members of the Administrator, Configuration, and Edit Results security groups can edit these fields., however control security can be customized as needed. Selecting or entering a new value in any of these fields causes the new value to be saved immediately.

Select the Edit button from the toolbar to edit a point. This button is a toggle button and appears pressed when editing is on and not pressed when editing is off.



The changes are saved instantaneously when the field is navigated away from, just like when making changes to the data grid entries.

To edit individual readings for points shown in the View Results grid, double click the row. The View Point Readings screen is displayed.

***Note:** When viewing Manual Template data, the Enter Text data is presented in the Test Status column which allows this data to be presented on a report.*

***Note:** The Edit button is only displayed if the System Default – “Work Order – Edit Calibration Points” is active and the Work Order is not locked.*

When using MET/TEAM Mobile, the Edit button is disabled if the Work Order was created prior to Mobile Check-out.

When editing is on, you can click into a cell on the grid and update most values. Pressing enter updates the data in the database for that one field that was edited. Some columns contain values that are not editable or are not directly editable. One such column is the RESULT column of the MET/CAL Results view. This column indicates the combined values of two fields. In order to change the value of this column, you must edit the individual columns that the RESULT column is comprised of (cPointPassFailStatus and cCondition on the Full Data view or the corresponding columns on the MET/CAL Classic view).

The buttons in the lower left corner of the View Results screen provide for copying, deleting and viewing point readings related to the results.

***Note:** When using MET/TEAM Mobile, Work Orders that were created prior to Mobile Check-out cannot be deleted and Results cannot be copied, edited, or deleted.*



- **Copy button** - Selecting the Copy button at the bottom of the grid creates a duplicate of the selected row and inserts this duplicate right underneath the selected row.

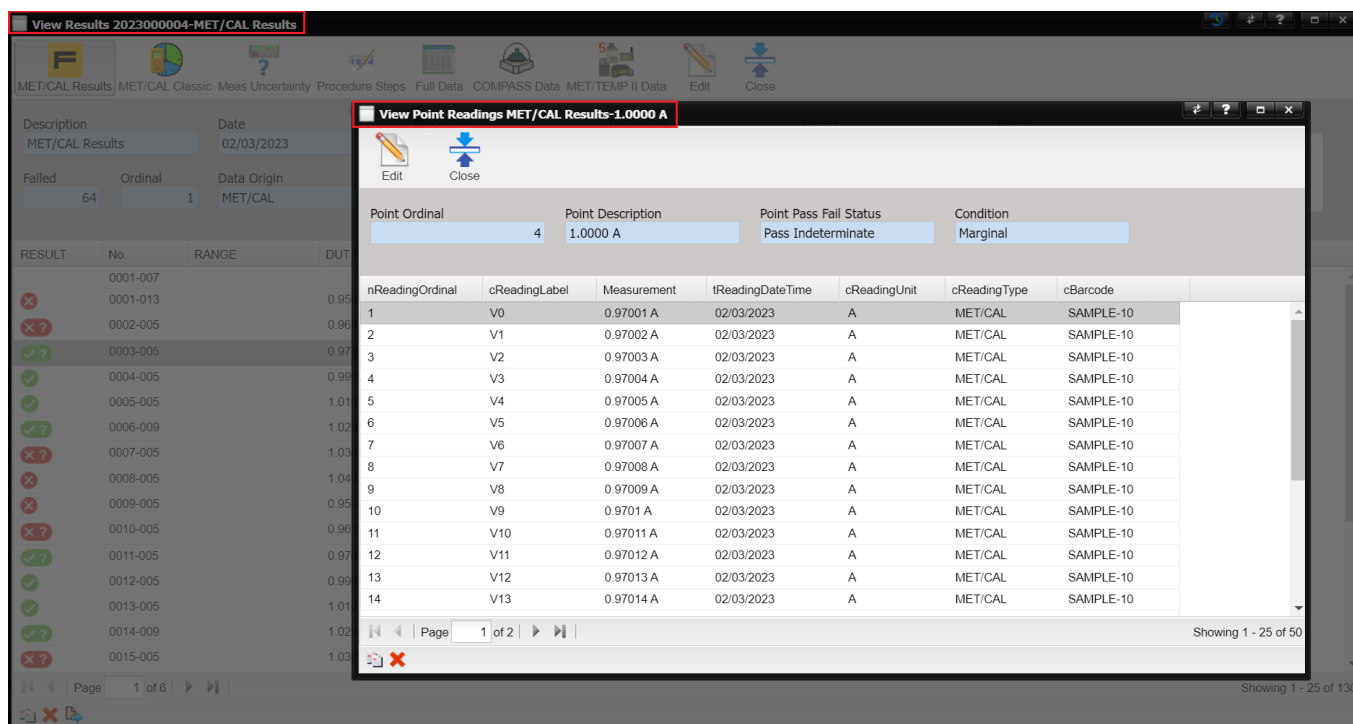


- **Delete button** - Selecting the Delete button at the bottom of the grid deletes the selected row, after a confirmation prompt is affirmed.



- **View Point Readings button** - Selecting the View Point Readings button at the bottom of the grid or clicking any row on the View Results screen opens the View Point Readings screen.





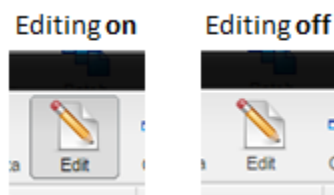
The View Point Readings screen displays the individual readings associated with the point highlighted on the View Results screen. You can Edit, Copy, or Delete individual readings. The **Measurement** and **cReadingUnit** columns are editable. All other fields are not editable. **Point Ordinal**, **Point Description**, **Point Pass Fail Status**, and **Condition** are displayed for ease of reference. The View Results screen is not accessible to prevent selection of another result while the View Points Readings screen is displayed.

To edit individual readings shown in the View Point Readings screen, select the Edit button in the toolbar.

Note: The Edit button is only displayed if the System Default – “Work Order – Edit Calibration Points” is active and the Work Order is not locked.

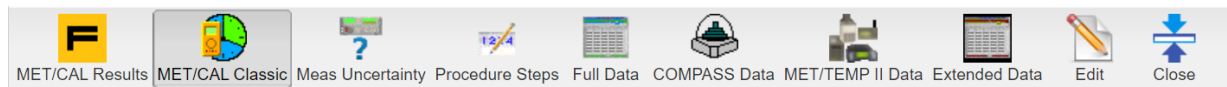
When using MET/TEAM Mobile, the Edit button is disabled if the Work Order was created prior to Mobile Check-out.

This button is a toggle button and appears pressed when editing is on and not pressed when editing is off.



When editing is on, you can click into a cell on the grid and update a value. Pressing Enter updates the data in the database for that one field that was edited.

While most characters are supported, some non-Unicode characters may not be interpreted correctly. To verify the change was saved as shown on screen, navigate off the current view and back to it to verify everything looks OK.



For example, manual update with two versions of the micro symbol, and after refreshing the view:

REMARK	REMARK
Root Difference Square guardban...	Root Difference Square guardban...
DISPLAY TEST	DISPLAY TEST
AC VOLTAGE TESTS	AC VOLTAGE TESTS
3.2 V Range	3.2 V Range
200 µA Range	200 µA Range
200 µA Range	200 µA Range
750 V Range	750 V Range

Correct the lower entry by using the Unicode version of the micro symbol, as used in the upper entry.

The buttons in the lower left corner of the View Point Readings screen provide for copying and deleting individual point readings related to the results.

Note: When using MET/TEAM Mobile, Work Orders that were created prior to Mobile Check-out cannot be deleted and Results cannot be copied, edited, or deleted.



- **Copy button** - Selecting the Copy button at the bottom of the grid creates a duplicate of the selected row and inserts this duplicate right underneath the selected row.



- **Delete button** - Selecting the Delete button at the bottom of the grid deletes the selected row, after a confirmation prompt is affirmed.



Edit Manual Calibration

Data points collected during a manual calibration can be edited by highlighting the row and then selecting the Quick Link button with the blue arrow pointing to the left. This button is only if a Manual Template was used to collect the data.



Note: This button is not enable if the data is from a MET/CAL procedure.

COMPASS Data File Import

Data from COMPASS can be imported via this button (Choose COMPASS Import option from dropdown). For complete details see the section [COMPASS Data File Import](#).



Note: The button is only visible when the System Default – “Work Order – Enable COMPASS Data File Import” is active.

MET/TEMP II Data File Import

Data from MET/TEMP II can be imported via this button (Choose MET/TEMP II Import option from dropdown). For complete details see the section [MET/TEMP II Data File Import](#).

Cubyt Data File Import

CAL-SHEET data from Cubyt can be imported via this button (Choose Cubyt Import (Json) option from dropdown). For complete details see the section [Cubyt Data File Import](#).



Export Results

The *Export Results* button is only enabled if the work order has results data (and security permits access).



The button exports the selected results or all results. If *Export selected results* is selected, the selected work order results and points are exported to a CSV file.

If *Export selected results* is selected, all work order results and points are exported to a CSV file.

Optionally, individual measurements (point readings) can be included as well.

The server data is adjusted from UTC to the time zone chosen on the Export Results dialog, for date/time values.

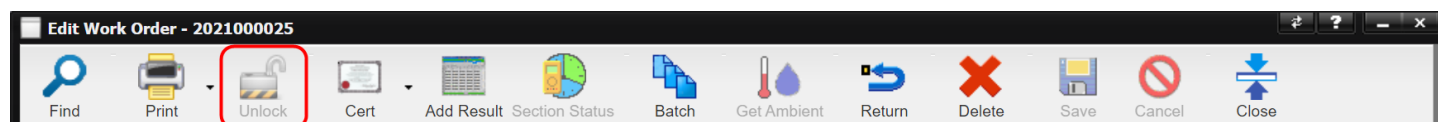
The included Points data reflects the *Full Data* option on the View Results screen.

	A	B	C	D	E	F	G
1	Date	Procedure Name	Description	Status	Data Origin	Data Condition	Run At Facility
2	4/26/2016 3:18	z540	MET/CAL Results	Fail	MET/CAL	As Found	Default Import Facility
3	Manual Template Row	nPointOrdinal	tPointDateTime	cPointLabel	cPointStatusFlags	cPointPassFailStatus	cFunctionSelectCode
4		1	12/31/1969 17:00	RSLT			RSLT
5		2	4/26/2016 3:18	Numeric		Fail	MEMCX
6	nReadingOrdinal	cReadingLabel	Measurement	tReadingDateTime	cReadingUnit	cReadingType	cBarcode
7	1	V0	0.95001 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
8	2	V1	0.95002 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
9	3	V2	0.95003 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
10	4	V3	0.95004 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
11	5	V4	0.95005 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
12	6	V5	0.95006 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
13	7	V6	0.95007 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
14	8	V7	0.95008 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
15	9	V8	0.95009 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
16	10	V9	0.9501 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
17	11	V10	0.95011 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
18	12	V11	0.95012 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
19	13	V12	0.95013 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
20	14	V13	0.95014 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
21	15	V14	0.95015 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
22	16	V15	0.95016 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
23	17	V16	0.95017 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
24	18	V17	0.95018 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
25	19	V18	0.95019 A	4/26/2016 3:18	A	MET/CAL	PRE0000007
26	20	V19	0.9502 A	4/26/2016 3:18	A	MET/CAL	PRE0000007

Work Order Unlock

The *Unlock* button at the top of the Work Order screen is used to unlock and edit Work Orders with a Status of “Closed”.

Note: When using MET/TEAM Mobile, Work Orders that were created prior to Mobile check-out cannot be unlocked.



This button is enabled only when the status of Work Order is “Closed” and the User is assigned to a Group that has access.

The System Default “Work Order – Revision Suffix” supplies the revision suffix that is appended to the Work Order Certificate Number and the .pdf file that is created when a closed Work Order is unlocked and then saved. The default suffix is “-Rev{0}” where the “{0}” represents the revision number that is incremented with each unlock. To maintain the uniqueness of the Work Order Certificate Number and .pdf file created, you must include “{0}” in the suffix.

Automatic Revision Tracking can be controlled by the System Default “Work Order - Revision Tracking”.

Note: This System Default applies, when a Work Order is unlocked and the Service Type is of Service Mode “Calibration”.

This System Default is used to control automatic revision tracking as follows:

Note: The file type created with revision tracking depends on the [System Default Work Order – Cert Creation](#). The file type saved is based on the value specified in the Work Order – Cert Creation System Default. When the Work Order-Cert Creation System Default is not active or is set to a value not used the the System Default, a .pdf file type is created by default.

- If inactive, automatic revision tracking is disabled.
- If active and the value is 0, no .pdf file of the current revision of the certificate is created.

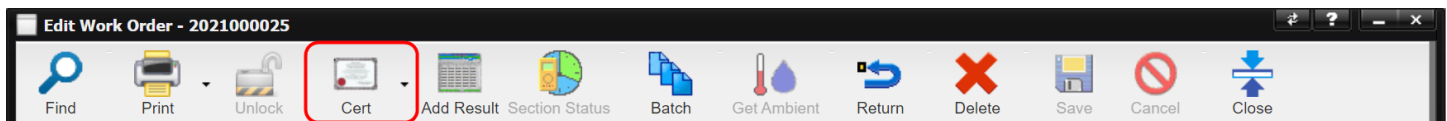
- If active and the value is **0a**, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. No .pdf file of the current revision of the certificate is created.
- If active and the value is **1**, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, and marked as Private.
- If active and the Value is **1a**, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. If Yes is selected on the message, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, and marked as Private. If No is selected on the message, no .pdf file of the current revision of the certificate is created.
- If active and the value is **2**, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, but is not marked as Private.
- If active and the Value is **2a**, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. If Yes is selected on the message, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, but is not marked as Private. If No is selected on the message, no .pdf file of the current revision of the certificate is created.

Note: When a Work Order is unlocked, if the Certification Number is blank and the Service Type is of Service Mode “Calibration”, the Certification Number is filled with the Work Order Number. This action is done to provide unique filenames for the .PDF created.

If a Work Order that has digital signatures is unlocked, changing any field value will cause the signatures to be cleared if the System Default “Work Order - Clear QC Approval” is active.

Work Order Cert

The Cert button at the top of the Work Order screen is used for printing a .pdf of the certificate or exporting a .xls of the certificate.



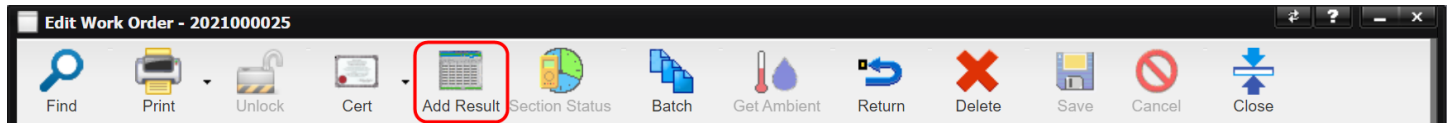
The .pdf or .xls that is printed or exported is based on the “Current Cert” column in the Work Order Files tab.

- If the Current Cert column is checked for a .pdf file, the .pdf is downloaded and can be opened by the user when the Cert button Print option is selected. When the Current Cert column is checked for a .pdf file and not for an .xls file, the Cert button Export option is disabled.
- If the Current Cert column is checked for an .xls file, the .xls is downloaded and can be opened by the user when the Cert button Export option is selected. When the Current Cert column is checked for a .xls file and not for a .pdf file, the Cert button Print option is disabled.
- If the Current Cert column is checked for both a .pdf and an .xls file, either the .pdf or the .xls is downloaded and can be opened by the user when the Cert button Print or Export option is selected.
- If there are no files marked as Current Cert, the Cert button either prints or exports the current certificate information stored for this Work Order. If there is a “merge” PDF file linked to the Work Order, that file is NOT appended to the end of the certificate PDF at this time. This only happens when the Work Order is being closed or when saving a previously closed Work Order that has been unlocked. Refer to [Work Order Files](#) for more information on “merge” files.

Note: The Cert button Export option is disabled when viewing Work Orders from MET/CAL.

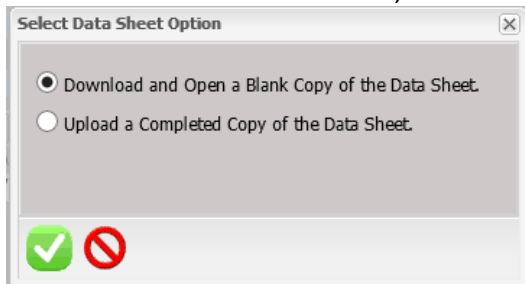
Add Result

Use the Add Result button to add results, via calibration or datasheet entry.



Note: The functionality of the “Add Result” button is affected by the System Default “Work Order – Use Multiple Procedures”

- The actions behind this button are based on the Data Sheet Type associated with the Procedure found in the ‘Procedure Used’ field if there are no results on the Work Order, or with the Procedure selected on the Find Procedure screen for subsequent results. If the “Procedure Used” field is blank, the Find Procedure screen is displayed. The Data Sheet Type is derived by first looking at the Procedure.
 - If the selected Procedure has a Category of “MET/CAL”, the system assumes this procedure is used to manage MET/CAL related data sheets.
 - If the *Type Procedure Default* has a Data Sheet associated, that file is used.
 - If the selected Procedure has a Data Sheet associated but the *Type Procedure Default* does not have a file associated, the *Procedure* file is used.
 - The types of files that can be associated with the data sheets are either:
 - MET/CAL Procedure
 - Manual Template
 - File (Excel, PDF, etc.)
- If the selected Procedure is a file, the Select Data Sheet Action dialog is displayed.



- **Download and Open a Blank Copy of the Data Sheet** – This refers to the ‘Data Sheet’ configured for the currently selected ‘Procedure Used’. If this option is selected and the OK button is pressed, a copy of the ‘Data Sheet’ is downloaded to your computer.
- **Upload a Completed Copy of the Data Sheet** – This option is used when you have made local changes to the ‘Data Sheet’ file and want to attach your completed document to the respective Work Order. Selecting this option displays an upload box which allows you to select a file from your hard drive. Select the OK button to complete the upload. A copy of the uploaded file is added as a file attachment to the Labor / Files tab.
- If the selected Procedure is a Procedure that has the Category of **MET/CAL**, MET/CAL is launched and the user proceeds through the process of performing a MET/CAL calibration.
- If the ‘Procedure Used’ is a **Manual Template**, the Manual Template ‘Calibrate’ page is displayed.

The screenshot shows the 'Calibrate' window with a toolbar at the top containing icons for Print, Instructions, Copy, Save, Cancel, and Close. Below the toolbar is a header section with fields for Barcode (PRE0000056), Serial Number (1-12100291r3), Data Condition (As Found), and Notes. The main area is a table with columns: Source, Step, Description, Label, Row Type, Nominal, Low Limit, High Limit, and PRE0000056 (1-12100291...). The table contains 13 rows of test steps, including 'General Tests' and 'Performance Tests'. The 'Performance Tests' section includes 'Frequency Measure' with a value of 13.21 highlighted in red.

Source	Step	Description	Label	Row Type	Nominal	Low Limit	High Limit	PRE0000056 (1-12100291...)
<input type="checkbox"/>	1	General Tests		Bold Label				
<input type="checkbox"/>	2	Connector - Check threads are OK		Checkbox				
<input type="checkbox"/>	3	Noise	Is fan noisy?	Y = Fail				
<input type="checkbox"/>	4	Open Input Test	Is Reading betw...	Y = Pass				
<input type="checkbox"/>	5			Blank				
<input type="checkbox"/>	6	Performance Tests		Bold Label				
<input type="checkbox"/>	7	Frequency Measure		Inside Limit	12.00 MHz	10.00 MHz	13.20 MHz	13.21
<input type="checkbox"/>	8	Residual Noise		<= Limit	6.50 µV		6.50 µV	6.30
<input type="checkbox"/>	9	Minimum Power		>= Limit	13.50 dBm	13.50 dBm		13.55
<input type="checkbox"/>	10			Blank				
<input type="checkbox"/>	11	Enter case color		Enter Text				
<input type="checkbox"/>	12	Sample Report Label		Report Label				
<input type="checkbox"/>	13	Enter text		Enter Text				

Note: When adding a manual template calibration to a Work Order that already has results, the Data Condition is automatically set to As Left.

By selecting the arrow on the Print/Export button, this button can be used to print a Crystal Report that is a replicate of the Manual Template or to create a .CSV file that is a replicate of the Manual Template.

Note: This feature is designed to print a blank copy of the original Manual Template for the purpose of recording results on paper. This feature will not print any changes made to the copy of the Manual Template associated with this Work Order (i.e. nominal values changed or test data entered on the Calibrate screen). This feature was not intended to be used as a reporting tool.

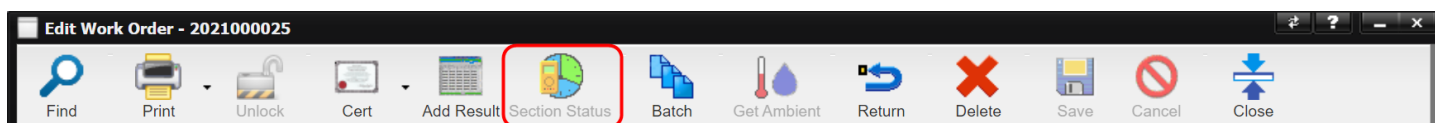
The screenshot shows the 'Calibrate' window with the 'Print' button dropdown menu open. The menu has two options: 'Print' and 'Export'. Below the menu is a table with columns: Source, Step, Description, and Label. The table contains one row with Step 1, Description 'Measure capacitance@100pF', and Label 'Test 1'.

Source	Step	Description	Label
<input type="checkbox"/>	1	Measure capacitance@100pF	Test 1

Results can be viewed in the Results Viewer, added to, deleted and exported on the *Results* tab.

Work Order Section Status

The *Section Status* button at the top of the Work Order screen is only used in conjunction with MET/CAL related procedures. More specifically the feature is linked to a MET/TEAM procedure defined with the category of "MET/CAL", that includes a Data Sheet that is a MET/CAL Procedure Executable generated using tagged sections. If the Work Order includes results collected with such a procedure, the menu option is enabled.



Procedure sections are defined by special comments embedded in the MET/CAL procedure. The comments describe sections of the procedure that can be individually executed or skipped when launched by the MET/CAL Runtime. This feature allows users to run a calibration at different times or in different physical locations and automatically link all of the results to a single Work Order. Review the MET/CAL Editor Help for more information on how to use Procedure Sections.

When the button is selected, the Procedure Section Status screen is displayed with columns of section information extracted from the procedure. Section details for all unique procedures are listed in this table. If the same procedure is executed multiple times there is only one instance of the section details for that procedure. The Execution flag for a section will be active if the section was run 1 or more times for any of the procedures.

The fields cannot be edited on this screen. The original MET/CAL procedure must be modified and executed again to generate a table with modified information.

Note: The Work Order cannot change to **“Complete”** unless all sections marked as **Required** have been executed at least **1 time**.

Procedure Section Status					
Close					
Procedure Section List					
Executed	Req	Tag Name	Procedure Name	Time (min)	Notes
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Tests using 57xxA and 5725A	Keithley 2110 DMM 1 yr Verification IEEE-488 using ...	22	Notes
<input checked="" type="checkbox"/>	<input type="checkbox"/>	...Tests using 55xx	Keithley 2110 DMM 1 yr Verification IEEE-488 using ...		
<input checked="" type="checkbox"/>	<input type="checkbox"/>Temperature Tests	Keithley 2110 DMM 1 yr Verification IEEE-488 using ...		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform Display Test	Fluke 77 Using Procedure Splitter	1	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform VAC Verification	Fluke 77 Using Procedure Splitter	4	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform DC Voltage Verification	Fluke 77 Using Procedure Splitter	15	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 3.2 VDC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 32 VDC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 320 VDC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 1000 VDC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform 320 mVDC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform Diode Test	Fluke 77 Using Procedure Splitter	1	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform Resistance Verification	Fluke 77 Using Procedure Splitter	10	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 320 Ohm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 3200 Ohm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 32 KOhm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 320 KOhm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 3.2 MOhm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	...Perform 32 MOhm Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform mA DC Verification	Fluke 77 Using Procedure Splitter	2	
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Perform A DC Verification	Fluke 77 Using Procedure Splitter	2	

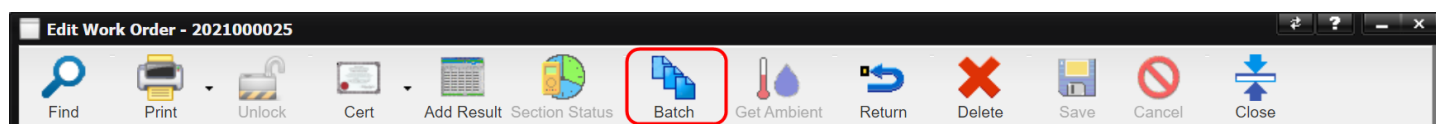
Procedure Section Grid Field Definitions

- **Executed** - True/False if the section was run one or more times. Review the Results tab on the Work Order to determine the total number of times that a section was run.

- **Req** - True/False if the specific section is tagged as being required. The tag of the section is defined in the original MET/CAL procedure. This section has to be run eventually.
- **Tag Name** – The name associated with the specific procedure section.
- **Procedure Name** - The name of the MET/TEAM procedure used for the specific section.
- **Time (min)** – The execution time in minutes estimated by the procedure writer (not actual run times).
- **Notes** - Notes associated with the specific MET/CAL Procedure Section.

Work Order Batch

The *Batch* button at the top of the Work Order screen is for changing information on multiple Work Orders at one time. The Work Order that is being displayed is the “master” Work Order. The information on this Work Order will be used to update other Work Orders.



Note: Only Work Orders with the matching “Procedure Used” and a Working Lab that matches the currently logged in Facility can be updated using the Batch button.

When the Batch button is selected, the Find screen is displayed.

Search Field	Starts With	Exact	Search Value
Open Date	<input type="checkbox"/>	<input type="checkbox"/>	
Asset Barcode	<input type="checkbox"/>	<input type="checkbox"/>	
Serial Number	<input type="checkbox"/>	<input type="checkbox"/>	
Model Number	<input type="checkbox"/>	<input type="checkbox"/>	
Asset Description	<input type="checkbox"/>	<input type="checkbox"/>	
WO Number	<input type="checkbox"/>	<input type="checkbox"/>	

Open Date	Asset Barcode	Serial Number	Model Number	Asset Description	WO Number
12/18/2013	Thomas 11-1		11	Thomas 11	2013000589
12/18/2013	Thomas 11-2		11	Thomas 11	2013000590

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When the Find button is selected on the Find screen, only the Work Orders with matching “Procedure Used” and the “Working Lab” are displayed. Double click the Work Orders that are to be changed and select the OK button.

The Batch Process Work Orders screen is displayed listing the Work Orders chosen to be updated to match the “master” Work Order.

Barcode	Status	Customer	Model Number	Serial Number	Description
Sample-10.5	Received	My First Customer	10.5	A12.33-B14	Multimeter
SAMPLE-10	Awaiting Inspect...	My First Customer	10	10101010	Multimeter

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Fields to update

Field	Copy
Accuracy Notes	<input checked="" type="checkbox"/>
Adjustment Tests (C2353)	<input checked="" type="checkbox"/>
Assigned Tech	<input checked="" type="checkbox"/>
Building	<input checked="" type="checkbox"/>
C2306	<input checked="" type="checkbox"/>
Cancelled	<input checked="" type="checkbox"/>
Category (WO)	<input checked="" type="checkbox"/>
Cert Format	<input checked="" type="checkbox"/>
Delay Date	<input checked="" type="checkbox"/>
Due Date	<input checked="" type="checkbox"/>

- ☒ Copy Log Notes
- ☒ Copy Labor
- ☒ Copy Standards
- ☒ Copy Accreditations
- ☒ Add Master Log Notes
- ☒ Add Child Log Notes

To add Work Orders, select the “+” button to add other Work Orders.

To delete Work Orders, highlight the Work Order by clicking the desired Work Order in the grid and selecting the “X” button.

Fields to update grid

The Fields to update is a list of fields that can be copied from the master to the dependents. The list includes the configured work order extended data fields. Select the label of the fields to uncheck or check the fields you want updated. Right click on the grid to Select All or Select None.

Note that Technician Signature and QC Signature fields cannot be applied to other Work Orders and are therefore not included in the list.

Work order Information check boxes

- **Copy Log Notes**

When **Copy Log Notes** is checked, the Work Order Log Notes are copied from the master to each of the dependents.

- **Copy Labor**

When **Copy Labor** is checked, each Labor entry is copied from the master to the dependents.

- **Copy Standards**

When **Copy Standards** is checked, each Standard entry is copied from the master to the dependents.

- **Copy Accreditations**

When **Copy Accreditations** is checked, each Accreditation entry is copied from the master to the dependents.

- **Add Master Log Notes**

When **Add Master Log Notes** is checked, a Log Note is added to the master record recording the Batch Process.

- **Add Child Log Notes**

When **Add Child Log Notes** is checked, a Work Order Log Note is added recording the Batch Process itself to the dependents.

Note: The batch process supports Data Checks. In the code, the checked status (0/1) can be retrieved or set using the `DataCheck.BatchProcessGetCopy()` and `DataCheck.BatchProcessSetCopy()` functions. To retrieve the UID of the master work order, call `DataCheck.BatchProcessGetMasterUID()`. To access the comma separated list of UIDs for all work orders, call `BatchProcessGetCallSheetUIDs()`.

For example:

```
var masterLog = DataCheck.BatchProcessGetCopy("IAddMasterLogNotes");
var tech = DataCheck.BatchProcessGetCopy("nTechnicianUID");
```

```
DataCheck.BatchProcessSetCopy("nQCApprovedByUID", 0); // unchecks the QC Approved By check box in the list
```

Supported Fields:

Work Order Fields
nCategoryUID
nSubCategoryUID
nAssignedTechUID
nTechnicianUID
nSubContractorUID
nCalendarUID
nSubContHours
nSubContCost
nSubContLabCost
tDelayDate
clInitialCondition
cServiceReason
cCallSheetType
cStickerType
cCallSheetStatus
clInterval
clIntervalUOM

cTemperature
cHumidity
cPressure
cArea
cCertFormat
tMaintDate
tMaintNextDate
nQuantity
nPriority
nTechnicianPriority
IISOCert
IOnSite
IReturnNoMaint
ISubContracted
IOOT
IDelayed
ICancelled
mCallSheetNotes
mAccuracyNotes
mUncertaintyNotes
mSubContractorNotes
mOOTNotes
mStickerNotes
On Screen Options
ICopyLogNotes
ICopyLabor
ICopyStandards
ICopyAccreditations
IAddMasterLogNotes
IAddChildLogNotes
Extended Data Fields (Depends on Setup)
CallSheetEx.tField7
CallSheetEx.tField8
CallSheetEx.tField9
CallSheetEx.tField10
CallSheetEx.nField30
CallSheetEx.nField31
CallSheetEx.nField32
CallSheetEx.nField33
CallSheetEx.nField34

CallSheetEx.nField2
CallSheetEx.nField35
CallSheetEx.lField5
CallSheetEx.lField10
CallSheetEx.mField2
CallSheetEx.mField3
CallSheetEx.nField3
CallSheetEx.nField29
CallSheetEx.cField4
CallSheetEx.lField3
CallSheetEx.cField5
CallSheetEx.lField6
CallSheetEx.nField11
CallSheetEx.nField12
CallSheetEx.nField13
CallSheetEx.nField14
CallSheetEx.tField6

Work Order Batch Process Calibrate Button

The Calibrate button is enabled if the procedure you have selected is configured to use a Manual Template Data Sheet. When selected, you can perform a batch of calibrations for all of the Assets that were selected from the Find screen.

To begin, select the Calibrate button. The Calibrate screen is displayed.

Barcode	Serial Number	Data Condition	Notes
179-III	2-41400871u8	As Found	
PRE0000022	8-12340291k1	As Found	
PRE0000056	1-12100291r3		
PRE0000086	1-13100491q7		
PRE0000111	3-121002912		

Source	Step	Description	Label	Row Type	Nominal	Low Limit	High Limit	179-III (2-41400871u8)	PRE0000022 (8-12340291...	PRE0000056 (1-12100291...	PRE0000086 (1-13100491...	PRE0000111 (3-12100291...
<input type="checkbox"/>	1	General Tests		Bold Label								
<input type="checkbox"/>	2	Connector - Check threads are OK		Checkbox								
<input type="checkbox"/>	3	Noise	Is fan noisy?	Y = Fail								
<input type="checkbox"/>	4	Open Input Test	Is Reading betw...	Y = Pass								
<input type="checkbox"/>	5			Blank								
<input type="checkbox"/>	6	Performance Tests		Bold Label								
<input type="checkbox"/>	7	Frequency Measure		Inside Limit	12.00 MHz	10.00 MHz	13.20 MHz					
<input type="checkbox"/>	8	Residual Noise		<= Limit	6.50 µV		6.50 µV					
<input type="checkbox"/>	9	Minimum Power		>= Limit	13.50 dBm	13.50 dBm						
<input type="checkbox"/>	10			Blank								
<input type="checkbox"/>	11	Enter case color		Enter Text								
<input type="checkbox"/>	12	Sample Report Label		Report Label								
<input type="checkbox"/>	13	Enter text		Enter Text								

The screen is based off of the Manual Template associated with the selected Procedure. The columns on the right are the Barcodes of the Assets. Enter a DUT (device under test) Reading for each of the rows for each of the selected Assets.

Note: Be sure to save as you enter data.

When the Save button is selected, this screen automatically associates the manually entered data with the Assets Work Order and creates a results point record on the Results tab of the Work Order.

Additionally, pick the Data Condition for the Asset results and enter Notes where appropriate. This information is saved with the Calibration data and is unique for each of the Assets.

Note: The order of the asset columns is determined by the order of the records on the Batch screen grid.

Note: The Print button is always disabled during batch calibrations

Note: DUTs that already have results collected for the current work order are defaulted to As Left for their Data Condition

Work Order Batch Process Process Button

The Process button performs the batch change process and displays a message box once it completes the operation.

Note: If the “Work Order – Clear QC Approval” System Default is active, and one or more of the selected Work Orders has been signed by the technician and/or QC approver, a prompt is displayed indicating all signatures will be removed from the Work Orders that are being updated. You must confirm this warning to continue.

The following fields are modified. These are arranged by Work Order sections.

- **Editable Asset Data fields** – Service Type(WO) , Status, QC Approved By, QC Approved Date.
- **Service Tab fields** – Interval, UOM, Sticker Type, Cert Format, Assigned Tech, Technician, Work Area, Initial Condition, Reason for Service, Temperature, Humidity, Pressure, On Site, Sub Contracted, ISOCert, Cancelled, Received OOT, Return No Maint, Rejected.
- **Extended Data Tab fields** – Category (WO), Sub Category (WO), Quantity.
- **Log Notes Tab fields** – A Log Note is added stating this Work Order was the “master” or which Work Order was used as the master to update this Work Order.

Date	Status	Location	Note	First	Last
07/11/2013	Batch Processed		Master Work Order was Barcode: SAMPLE-11 Ca...	System	Administrator
07/11/2013	Received			System	Administrator

- **Labor/Files Tab fields** – The labor is updated. The Files **are not** updated.
- **Standards/Accreditations Tab** – Both the Standards and Accreditations information are updated.

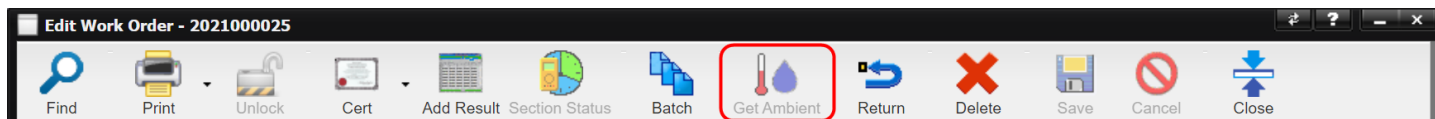
- **Notes Tab fields** – Accuracy, Uncertainty, Out of Tolerance, General.
- **Parts Tab fields** – The Parts **are not** updated.
- **Sub Contract / Estimate Tab fields** – Sub Contractor, Sub Cont Cost, Sub Cont Lab Cost, Sub Cont Hours, Sub Contractor Notes.

Work Order Batch Process Close Button

The Close button closes the Batch Process Work Orders screen.

Work Order Get Ambient

The Get Ambient button at the top of the Work Order screen is for retrieving ambient temperature and humidity data.



If you are using MET/CAL's RHT system or LogWare III to gather ambient data, the Get Ambient button can be configured to retrieve ambient condition data from your system's RHT.INI file and populate the Temperature and Humidity fields on Work Orders that have not yet been closed. The Get Ambient button is disabled if the Work Order has been previously closed or if the System Default setting "Work Order – Temperature and Humidity Data" is not active. When the Get Ambient button is clicked, the RHT.INI file specified in the Value field of the System Default setting is accessed.

- If there is data for only one sensor in this file, the temperature and/or humidity readings are read in and used to populate the Temperature and Humidity fields on the Work Order.
- If there is data for more than one sensor in this file, the Ambient Conditions screen is displayed. The Ambient Conditions screen lists all of the sensors with their current Temperature and Humidity readings (including units if any) and the date/time that the readings were taken (in local time). Locate and select the row for the sensor to use to populate the Temperature and/or Humidity fields on the Work Order and click the OK button. Clicking the Cancel button simply closes the Ambient Conditions screen.

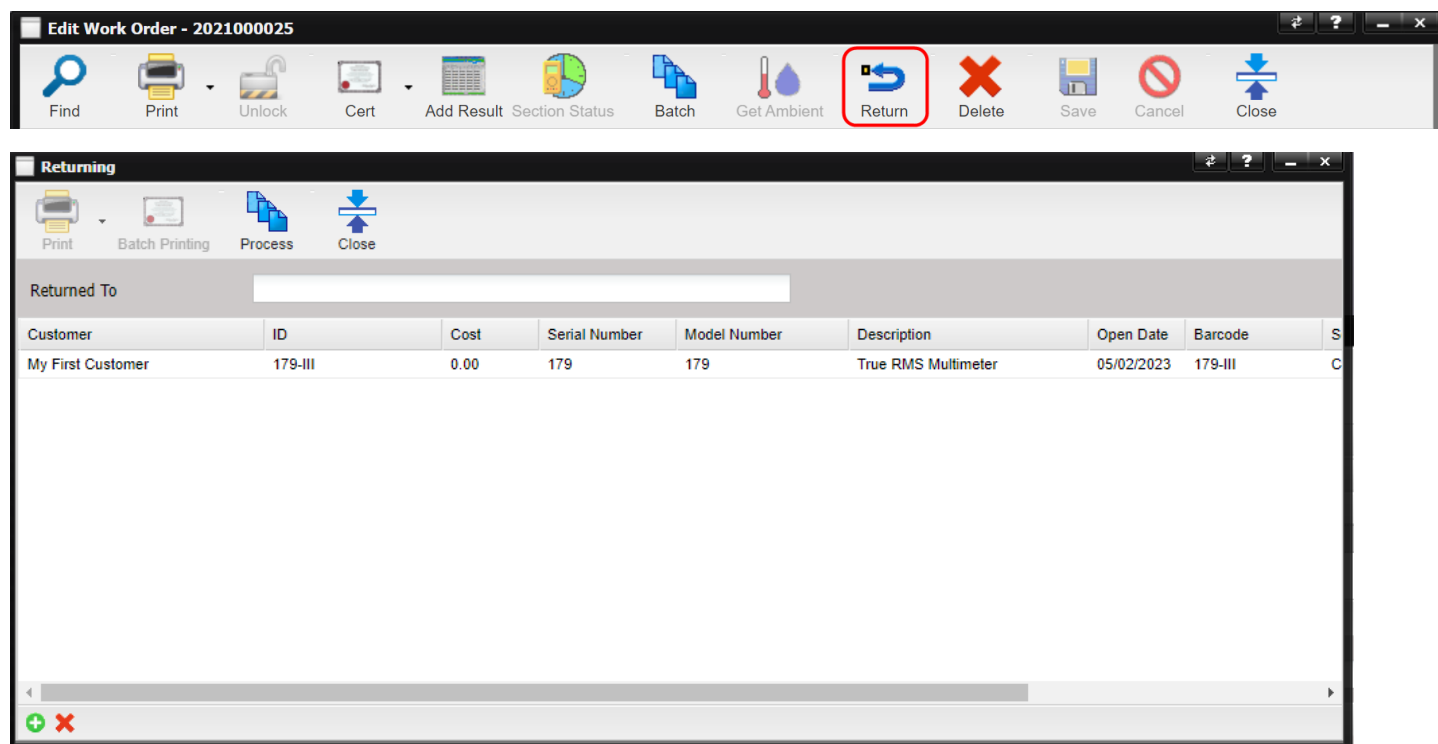
Ambient Conditions			
<div> <div>✓</div> <div>✗</div> <div>OK</div> <div>Cancel</div> </div>			
Sensor ▲	Temperature	Humidity	Date/Time
A97483	22.978 C	27.25 RH	12/01/2015 13:31:15
AF CL STAGING	22.850 C	29.60 RH	12/04/2015 15:20:08
AF CL1 ROOM 1	22.775 C	30.78 RH	12/04/2015 15:18:22
AF CL1 ROOM 2	23.477 C	26.49 RH	12/04/2015 15:18:23
AF CL1 ROOM 3	24.551 C	25.91 RH	12/04/2015 15:20:02
AF CL1 ROOM 4	23.782 C	27.78 RH	12/04/2015 15:20:02
AF CL2 ROOM 1	23.545 C	28.55 RH	12/04/2015 15:20:10
AF CL3 EAST	23.854 C	23.54 RH	12/04/2015 15:16:58
AF CL3 WEST	23.580 C	24.52 RH	12/04/2015 15:16:57
AF CUSTOMS CAL	23.074 C	24.12 RH	12/04/2015 15:16:54
AF FACT WEST	22.552 C	19.06 RH	12/04/2015 15:17:53
AF IR CAL	24.476 C	20.27 RH	12/04/2015 15:17:51
AF PY NORTH	25.096 C	18.03 RH	12/04/2015 15:20:04
AF PY SOUTH	20.758 C	21.84 RH	12/04/2015 15:20:04
AF PY WEST	23.149 C	30.33 RH	12/04/2015 15:17:53

The Temperature and/or Humidity fields on the Work Order are populated with only the numeric value for the readings. Any units are removed.

When selecting a sensor, make sure the date/time stamp is recent. If the date/time stamp is not recent, the readings in the RHT.INI file may not be getting updated as expected.

Returning

The Returning process tells MET/TEAM that the service facility has completed work and is ready to return the Asset to the owner. At this time, Work Orders become history records and can no longer be modified by the service facility.



Returning Process

The Returning process returns Work Orders. In the Find Closed Work Orders screen (displayed when the Returning menu option is selected), enter your search criteria and press Find. Select the Work Orders to return by double clicking in the list of Work Orders to add them to the bottom panel, or use CTRL+A to select all Work Orders from the search, then select the OK button in the tool bar.

In the Returned To field, enter the info of the person the asset(s) are being returned to. This information will be stored with the work orders.

After reviewing the Work Orders in the Returning Assets grid, select the Process button. The following actions occur when the Process button is selected.

- Any data checks associated with the Returning process are executed and processed.
- A certificate file is produced in either .pdf or .xls format. See the [System Default Work Order – Cert Creation](#) for application behavior using this System Default.

To add additional Work Orders to be returned, select the “+” button at the bottom of the screen and repeat the process using Find Closed Work Order screen.

To remove a Work Orders, select the record to delete, and then select the “X” button at the bottom of the screen.

Once the items have been processed, any reports configured by the “Returning” system defaults can be printed by selecting the Print button or open the Batch Printing screen by selecting the Batch Printing button.

Note: During this process the dollars are calculated and the funding engine updates the appropriate job numbers.

Bulk Receiving

Bulk Receiving is the process of using a delimited text file to facilitate selecting a list of Assets to receive.

- **File Name** – The name of the source file to import information about the Assets to receive. Click the ellipses button to select the file.
- **Skip Header Rows** – The number of header rows at the top of the source file that do not contain data.
- **Separator** – The separator/delimiter character used in the source file to separate fields. Supported separator characters include comma (,), semi-colon (;), pipe (|), and TAB (\t).

- **Column To Use** – When a source file is selected, this drop-down list is populated with values from the first line of the selected source file and indicates which column the values to use should be extracted from.
- **Database Field To Match** – The database field (Assets) that the values extracted from the source file's Column To Use should be compared to. Choices are limited to Barcode, ID, and Serial Number.

When the Bulk Receiving screen is displayed, click the ellipses button next to the File Name field to select the source file to use. The Select File popup dialog is displayed. Click the Select File button, navigate to and select the file to use and click Open. The name of the selected file is displayed in the File Name field. The content of the file is read in and parsed and the Column To Use drop-down list is automatically populated with proper values for the selected file, and the Separator field value should be set to the proper value. Column To Use values and the Separator are always derived from the top (first) line of the file.

Enter the number of header (non-data) rows there are at the top of the selected source file. The source file is not required to contain any header rows, but it is recommended (if only to facilitate the selection of the Column To Use drop-down list values). If there are no header rows in the source file, the Column To Use drop-down list will contain the values of the first item to import.

The Separator should be selected automatically when the selected source file is parsed.

Use the Column To Use drop-down list to select the column that contains the values to import from the source file. The values from the selected column must match 1 to 1 with the Assets to be received.

Use the Database Field To Match drop-down list to select the field on the Asset records that should match the values in the column identified by the Column To Use field.

Once all fields have been configured, the Process button will be enabled. Click the Process button to process the selected source file.

As the source file is processed, certain conditions may cause one or more Assets to fail to be included, such as:

- Asset is not Active
- Asset has already been received (Work Order already exists and multiple Work Orders are not allowed per System Default configuration)
- No Asset matching the criteria was found
- Multiple Assets matching the criteria were found (ambiguous)

In case any of these situations occur, a warning message is displayed which includes an indication for each affected Asset and the reason it could not be included.

If any Assets were able to be included, the Receiving Assets screen is displayed.

Shipping

The Shipping process allows shipments to be created or viewed and modified.

Edit Shipment

Find Print Unlock Add Delete Save Cancel Close

Shipping Info Shipping Items

Ship From: MT Shipment Name: Created Date: 08/29/2016

Ship To: Fluke AMF Location: Shipment Number: 2016000007

Date Shipped: 08/31/2016 ☐ Shipped

Shipper: UPS

Tracking Number:

Required Date:

Authority:

Notes:

Additional Info: Issued By:

Shipping Tabs

Two tabs are used to enter shipping information and items.

Shipping Info

The Shipping Info tab displays general shipping information.

Shipping Info Shipping Items

Ship From: Fluke - AMF_ Shipment Name: Created Date: 04/09/2014

Ship To: FLUKE Location: Shipment Number: 2014000029

Date Shipped: 04/09/2014 ☐ Shipped

Shipper: UPS

Tracking Number:

Required Date:

Authority:

Notes:

Additional Info: Issued By:

- **Ship From** – The Facility that the shipment is shipping from. This location is preloaded with data from the “Default” mailing address on the Facility Address tab.
 - The ship from location can be changed by selecting the “...” button.
- **Shipment Name** – The name of this particular shipment.
- **Ship To** – The Facility that the shipment is shipping to.
 - The ship to location can be changed by selecting the “...” button.
- **Location** – The location of the shipment in the facility that the shipment is shipping from.
- **From** – The company name and address of the Ship From Location
 - This Address is preloaded with data from the “Default” mailing address on the Facility Address tab.
 - The Address can be manually edited or changed by selecting the “From” button and selecting a mailing location.
- **To** – The company name and address of the Ship To Location who ultimate receive it
 - This Address is preloaded with data from the “Shipping” mailing address on the Facility Address tab.
 - The Address can be manually edited or changed by “To” button and selecting a mailing location.
- **Interim Ship To** – Address routed to between from and the to
 - The address can be manually edited or changed by “Interim Ship To” button and selecting a mailing location.
- **Created Date** – Defaults to today’s date (the day the shipment information was creating).
- **Shipment Number** – Number of particular shipment
- **Date Shipped** – The date the shipment left the Ship From Location.
- **Shipped** – Automatically checked once the shipment is shipped. This checkbox cannot be customized because the functionality is associated with the Date Shipped field on this screen.
- **Shipper** – The mode of transportation used to transport the shipment to the Ship To Location. Defaults to the top item in the dropdown list.
- **Tracking Number** – Tracking number for this particular shipment
- **Required Date** – The requested date.
- **Authority** – The source of the data. For example: manufacturer, NAVAIR, etc.
- **Notes** – Notes to the shipper concerning this shipment.
- **Issued By** – The person completing the shipment information.

Shipping Items

The Shipping Items tab displays the list of Assets being shipped in this shipment. Assets and non-Assets can be added or removed from the shipment.

- Select the top “+” button on the right side to **Add Asset** – The Find Select Shipment Items screen is displayed. Highlight each item to be added to the Shipment and double click. The item will be moved to the bottom part of the screen. Select OK when done.

Select Shipment Items

Remember

Show Inactive

Barcode

Find

Export

Reset

Reset All

Add

OK

Cancel

Search Field

Starts With

Exact

Search Value

Asset Barcode

Owner

Disposition

Serial Number

Model Number

Asset Description

+

+

+

+

Assigned Facility

Service Facility

Authorizing Facility

All Facilities

Asset Barcode	Owner	Disposition	Serial Number	Model Number	Asset Description	Manufacturer
3054A	cal-1	In Service	1112	5500A	CALIBRATOR	
3325B	cal-1	In Service		5500A	CALIBRATOR	FLUKA
8902A	cal-1	In Service		5500A	CALIBRATOR	FLUKA
8903B	cal-1	In Service		5500A	CALIBRATOR	FLUKA
ALAN-001	cal-1	In Service		1234	Alan's Type	Facility

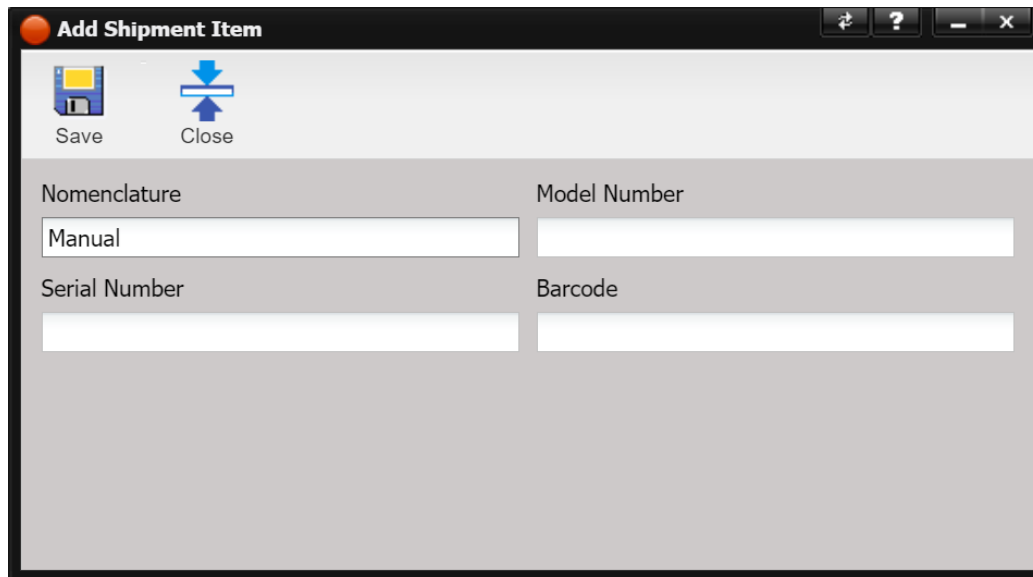
111

1 of 11

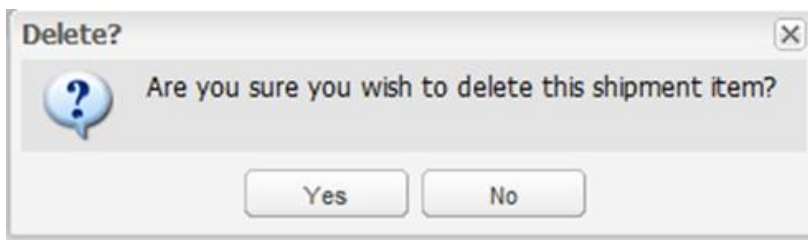
Showing 1 - 25 of 254

Asset Barcode	Owner	Disposition	Serial Number	Model Number	Asset Description	Manufacturer
---------------	-------	-------------	---------------	--------------	-------------------	--------------

- Select the 2nd "+" button on the right side to **Add Non-Asset** – The Add Shipment Item screen for adding an item that is not part of the MET/TEAM data. Fill in the information and the item will be added to the shipment item list.



- **Delete** – Prompts the user for confirmation to delete the highlighted shipment item and then deletes the shipment item from the list.



The shipment information can be previewed and printed by selecting the Print button.

Batch Change

Batch Change is used to change multiple Work Orders at one time. Log notes and Location can be added, Status can be changed, Work Orders can be subcontracted, Delay Date can be changed, digital signatures can be applied, and Work Status can be changed.

Customer	ID	Serial Number	Model Number	Description	Service Date
My first customer	SAMPLE-10	10101010	10	DIGITAL MULTIMETER	09/01/2015
My first customer	SAMPLE-11	1100110001	11	DIGITAL MULTIMETER	

Note: Each tab must be processed independently.

Examples:

If the need existed to sub contract a repair, the following steps would be required.

1. Enter the Sub Contractor information using the Sub Contractor tab.
2. Select the Process button.

If the need existed to add a Log Notes, the following steps would be required.

1. Enter a Log Note using the Work Order Log Notes tab.
2. Select the Process button.

Batch Change Assets Grid

This grid displays the list of the Work Orders that will be changed when the Process button is selected. Work Orders with a status of "Closed" cannot be selected.

Grid records can be:

- Sorted by ascending or descending order by clicking on the header of the column.
- Grouped by dragging and dropping the desired column header.
- Grid columns can be resized.

To add a Work Order select the "+" button at the bottom of the grid or the Add Work Orders button in the button bar at the top, select the Work Orders from the Find dialog, then select OK.

To remove a Work Order, highlight the Work Order in the grid and select the "X" delete button at the bottom of the grid.

The Work Order can be viewed or edited by selecting the Quick Link button at the bottom of the grid.

The Work Order can be viewed or edited by double-clicking on the selected grid item.

Grid paging is enabled when the Work Orders in the grid is more than 25.

Note: *If the “Work Order – Clear QC Approval” System Default is active and the Quality Control tab is not the active tab, if any of the selected Work Orders has been signed by the technician and/or QC approver, a prompt is displayed when the Process button is clicked indicating all signatures will be removed from the Work Orders that are being updated. You must confirm this warning to continue.*

Batch Change Data Checks

A data check can be created for the Batch Change process. See the Data Checks section for more information about creating data checks.

When the process button is selected, any data checks with the Affected Page set to Batch Change will run. Each data check will run against each asset in the grid.

The data check can access fields on the Batch Change screen including the tab control. Since data check might need to run based on the selected tab, the following java script returns the active tab index.

```
var container = Ext.getCmp('Tabs');  
var activeTab = container.activeTab;  
var activeTabIndex = container.items.findIndex('id', activeTab.id);
```

The index is zero based (0 to 4):

- [Index 0: Work Order Log](#)
- [Index 1: Sub Contractor](#)
- [Index 2: Quality Control](#)
- [Index 3: Work State](#)

Use “if” or “switch” statements to run code based on the active tab index.

```
switch (activeTabIndex) {  
    case 0:  
        // perform specific Work Order Log tasks  
        pass();  
        break;  
    case 1:  
        // perform specific Sub Contractor tasks  
        pass();  
        break;  
    case 2:  
        // perform specific Quality Control tasks  
        pass();  
        break;  
    case 3:  
        // perform specific Work State tasks  
        pass();  
        break;  
    default:  
        // Something went wrong  
        fail();  
        break;  
}
```

Batch Change – Work Order Log Tab

The Work Order Log tab is for specifying information that will be logged with the Work Order. The changes will be reflected on the Work Order Log Notes tab once the Process button is selected. This tab must be the active tab when the Process button is selected.

- **Status** – The status the Work Orders will be changed to and viewable on the Log Notes tab of the Work Order as a log entry.
- **Location** – The physical location for the Work Order log entry.
- **Log Note** – The notes which will be added to the Work Order log entry.

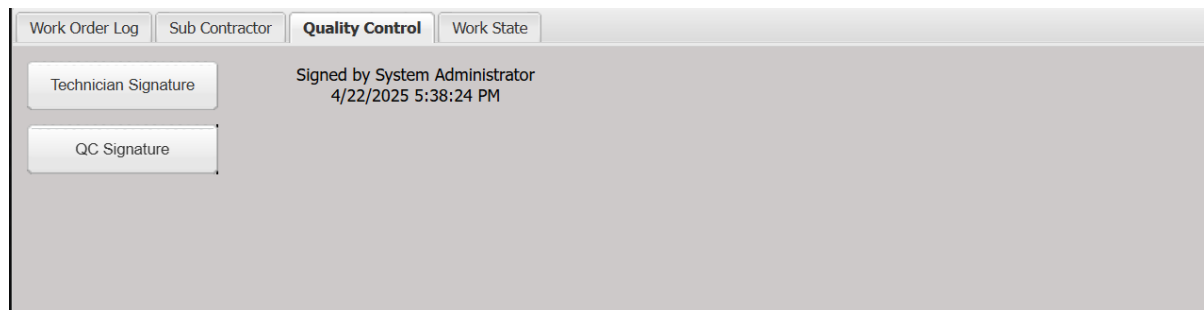
Batch Change – Sub Contractor Tab

The Sub Contractor tab is for capturing information about the sub contractor and any notes concerning the sub contractor. The changes will be reflected on the Work Order Sub Contractor tab once the Process button is selected. This tab must be the active tab when the Process button is selected.

- **Sub Contractor** – The facility that the Work Orders will be subcontracted to.
 - The Sub Contractor can be changed by selecting the “...” button.
 - The Sub Contractor can be viewed or edited by selecting the Quick Link button.
- **Delay Date** – The estimated return date for the Work Orders.
- **Sub Contracted** – If the Work Order Sub Contracted checkbox has changed, select a value from this dropdown.
 - No Change – The Work Order Sub Contracted check box remains in its current state. No change is made due to the Batch Change process.
 - Yes - The Work Order Sub Contracted check box is checked for all Work Orders being changed through this Batch Change process.
 - No - The Work Order Sub Contracted check box is not checked for all Work Orders being changed through this Batch Change process.
- **Sub Contractor Notes** – The notes for any Sub Contractor.

Batch Change – Quality Control Tab

The Quality Control tab is for applying digital signatures to the Work Orders. The changes will be reflected on the Work Order once the Process button is selected. This tab must be the active tab when the Process button is selected.



The screenshot shows a software interface with four tabs: 'Work Order Log', 'Sub Contractor', 'Quality Control' (which is the active tab), and 'Work State'. Below the tabs, there are two buttons: 'Technician Signature' and 'QC Signature'. To the right of the 'Technician Signature' button, the text 'Signed by System Administrator' and the timestamp '4/22/2025 5:38:24 PM' are displayed.

- **Technician Signature** – This button can be used to apply or remove the Technician Approver’s digital signature. The signee’s name and date/time stamp will appear to the right of the button.
- **QC Signature** – This button can be used to apply or remove the QC Approver’s digital signature. The signee’s name and date/time stamp will appear to the right of the button.

There are a few rules that are enforced when applying digital signatures to multiple Work Orders:

- You can set either the Technician Signature or the QC Signature, or both.
- When setting both signatures, the Technician Signature must be selected first.
- You must provide at least one signature. You cannot use this feature to remove all signatures from the Work Orders.

When processing the batch and attempting to apply digital signatures to the selected Work Orders, a few more rules apply:

- Work Orders that do not have a Technician Signature cannot have a QC Signature applied.
- Work Orders that already have a Technician Signature will have the QC signature removed if there is one when applying a new Technician Signature.
- Work Orders that already have a QC Signature will have the QC signature updated when applying a new QC Signature.

Warning messages will be displayed after processing is complete indicating if any of these rules affected the outcome.

When the System Default “Work Order - Clear QC Approval” is active, changing any fields on the Work Order using the Batch Change process will cause all signatures to be cleared.

Refer to the [Work Order – Service Tab](#) topic for more details about signatures.

Batch Change – Work State Tab

The Work State tab is for batch changing the Cancelled, Return No Maint, and Rejected checkboxes on Work Orders. The changes will be reflected on the Work Order once the Process button is selected. This tab must be the active tab when the Process button is selected.

Work Order Log	Sub Contractor	Quality Control	Work State
On Site No Change	Cancelled No Change	Required Date <input type="text"/>	
Expedite No Change	Return No Maint No Change	Priority 0	
ISOCert No Change	Rejected No Change		

- **On Site** – This dropdown allows batch changing the [On Site checkbox on the Work Order](#) indicating the service was done or needs to be done on site.
 - **No Change** – The Work Order *On Site* check box remains in its current state. No change is made due to the Batch Change process.
 - **Yes** - The Work Order *On Site* check box is checked for all Work Orders being changed through this Batch Change process.
 - **No** - The Work Order *On Site* check box is not checked for all Work Orders being changed through this Batch Change process.
- **Expedite** – This dropdown allows batch changing the [Expedite checkbox on the Work Order](#) indicating the Asset needs to be expedited through the service process.
 - **No Change** – The Work Order *Expedite* check box remains in its current state. No change is made due to the Batch Change process.
 - **Yes** - The Work Order *Expedite* check box is checked for all Work Orders being changed through this Batch Change process.
 - **No** - The Work Order *Expedite* check box is not checked for all Work Orders being changed through this Batch Change process.
- **ISOCert** – This dropdown allows batch changing the [ISOCert check box on the Work Order](#) indicating the Asset requires an ISO or Accredited certificate.
 - **No Change** – The Work Order *ISOCert* check box remains in its current state. No change is made due to the Batch Change process.
 - **Yes** - The Work Order *ISOCert* check box is checked for all Work Orders being changed through this Batch Change process.
 - **No** - The Work Order *ISOCert* check box is not checked for all Work Orders being changed through this Batch Change process.
- **Cancelled** – This dropdown allows batch changing the [Cancelled checkbox on the Work Order](#) indicating that the Service Facility cancelled the Work Order.
 - **No Change** – The Work Order *Cancelled* check box remains in its current state. No change is made due to the Batch Change process.
 - **Yes** - The Work Order *Cancelled* check box is checked for all Work Orders being changed through this Batch Change process.
 - **No** - The Work Order *Cancelled* check box is not checked for all Work Orders being changed through this Batch Change process.
- **Return No Maint** – This dropdown allows batch changing of the [Return No Maint checkbox on the Work Order](#) indicating the Asset owner has requested the Service facility to close the Work Order and have the Asset *returned with no maintenance* being performed.

- **No Change** – The Work Order *Return No Maint* check box remains in its current state. No change is made due to the Batch Change process.
- **Yes** - The Work Order *Return No Maint* check box is checked for all Work Orders being changed through this Batch Change process.
- **No** - The Work Order *Return No Maint* check box is not checked for all Work Orders being changed through this Batch Change process.
- **Rejected** – This dropdown allows batch changing of the [Rejected checkbox on the Work Order](#) indicating that as a result of the Work Order, the Asset has been rejected.
 - **No Change** – The Work Order *Rejected* check box remains in its current state. No change is made due to the Batch Change process.
 - **Yes** - The Work Order *Rejected* check box is checked for all Work Orders being changed through this Batch Change process.
 - **No** - The Work Order *Rejected* check box is not checked for all Work Orders being changed through this Batch Change process.
- **Required Date** – This date field allows batch changing of the [Required Date on the Work Order](#) indicating the date the customer requests the Asset to be returned by.
- **Priority** - This date field allows batch changing of the [Priority on the Work Order](#) indicating the service priority of the Asset.

All changes can be discarded by pressing the Cancel button at the top of the screen before the Process button is pressed.

Tool Assignments

Tool Assignments is used to track the process of loaning Assets to contacts and provides a complete history for both Assets and Contacts.

Menu Items

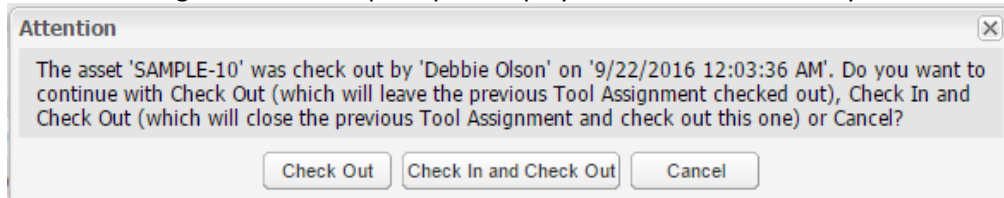
Find – Used to find existing assignment records.

Print – Used to print a report.

Check In – Used to return Tool Assignments.

Check Out – Used to create new Tool Assignments.

- When checking out an asset a prompt is displayed if the asset is already checked out.



- Select the Check Out button on this prompt, if you want to leave this asset assigned to the previous Tool Assignment.
- Select the Check In and Check Out button on this prompt, if you want to close this asset assigned to the previous Tool Assignment and check the asset out on this Tool Assignment.
- Select the Cancel button on this prompt, if you want to cancel the creation of this Tool Assignment.

Delete – Used to delete a selected assignment.

Save – Used to save recent changes.

Cancel – Used to cancel recent changes.

Close – Used to close assignment screen.

When **assigning** Assets, the grid displays a list of Assets that are assigned when save is selected.

To add an Asset select the "+" button, select the Assets from the find dialog, then click OK.

To remove an Asset, highlight the Asset and select the "X" delete button.

To view or edit information for an Asset, highlight the Asset and select the Quick Link button.

When **viewing** current assignments the grid contains existing assignment records.

To add an assignment select the "+" button, select the currently assigned Assets from the find dialog, then click OK.

To remove an assignment, highlight the Asset and select the "X" delete button.

To view or edit information for an assigned Asset, highlight the Asset and select the Quick Link button.

Tool Assignments – General Tab

The Standard tab contains information pertaining to whom and for how long the Asset is loaned.

The screenshot shows the "General" tab of a "Tool Assignments" window. It features several input fields and a "Notes" section. The fields are organized as follows:

- Contact:** A text input field with a red border.
- Contact's Past Due:** A label with a large "0" next to it.
- Loan Date:** A text input field with a red border.
- Expected Return:** A text input field with a red border.
- Return Date:** A text input field with a red border.
- Use Count:** A text input field with the value "0" and a red border.
- Assignment Number:** A text input field with a red border.
- Assigned Location:** A text input field with a red border.
- Notes:** A large text area at the bottom.

- **Contact** – The contact the tool is being assigned to.
- **Loan Date** – The date the Asset was loaned.
- **Expected Return** – The date the Assets are expected back.
- **Return Date** – The date the Assets were actually returned.
- **Contact's Past Due** – Indicates the number of overdue Assets for the selected contact. Tool assignments that have an expected return date that is past.
- **Use Count** – The number of times the instrument can be used as a standard.
- **Assignment Number** – The reference number created by MET/TEAM when tools are assigned.
- **Assigned Location** – The location the tool is being assigned to.
- **Notes** – Any notes concerning the loan.

Tool Assignments – Extended Data Tab


The Extended Data tab displays the extended data elements for an Asset. The data can be scrolled using the scroll bar on the right. The data can be edited by highlighting and double clicking the data element and filling in the value on the dialog that is displayed.


Property	Value
L2826	
L2827	
L2828	
L2829	
L2830	
L2831	
L2832	
L2833	
L2834	
L2835	

Tool Assignments – Files Tab

The Files tab displays files related the Tool Assignments. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, or view files.

General Extended Data Files	
File Name	








Page of 1

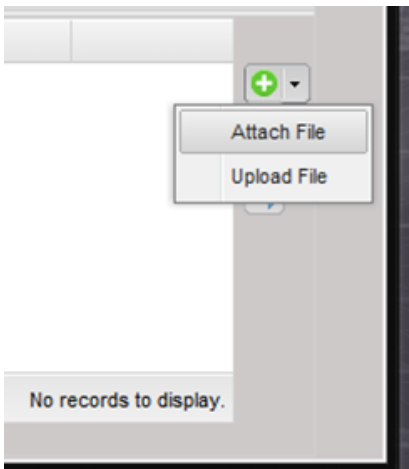


No records to display.

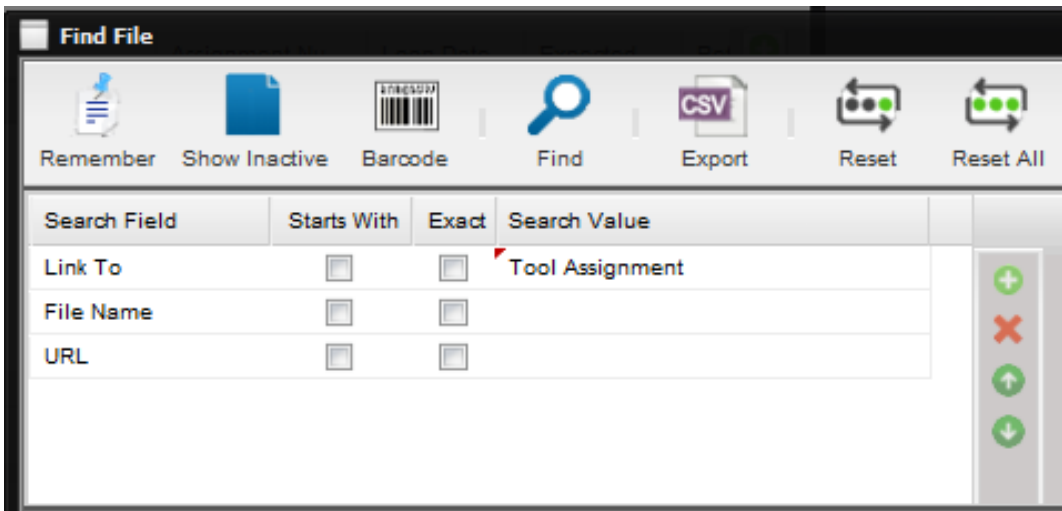
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.



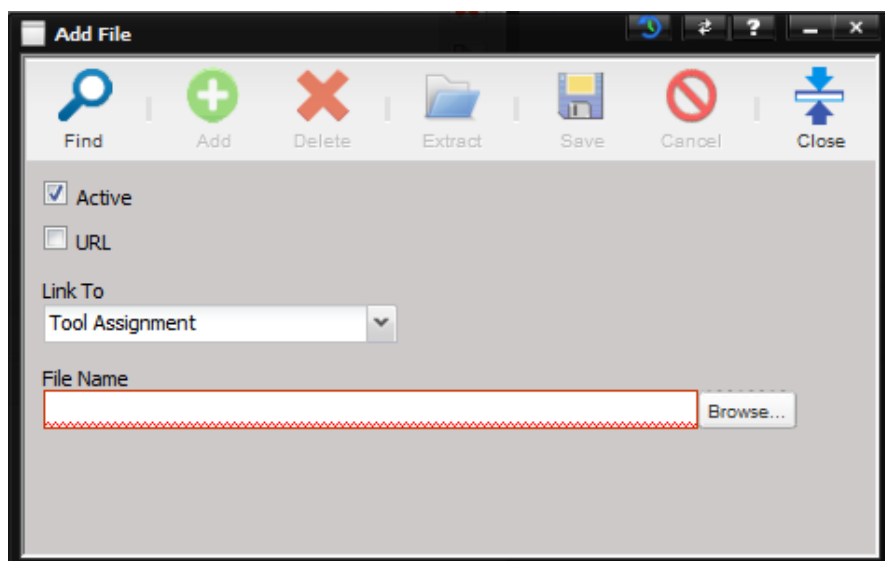
To attach an existing file to a Tool Assignments, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the 'Link To' search field contains the search value of "Tool Assignment". Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a 'Link To' entry of "Tool Assignment". Select the file to attach from the results grid and press OK.



To attach a new file or URL to a Tool Assignments, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Tool Assignments.

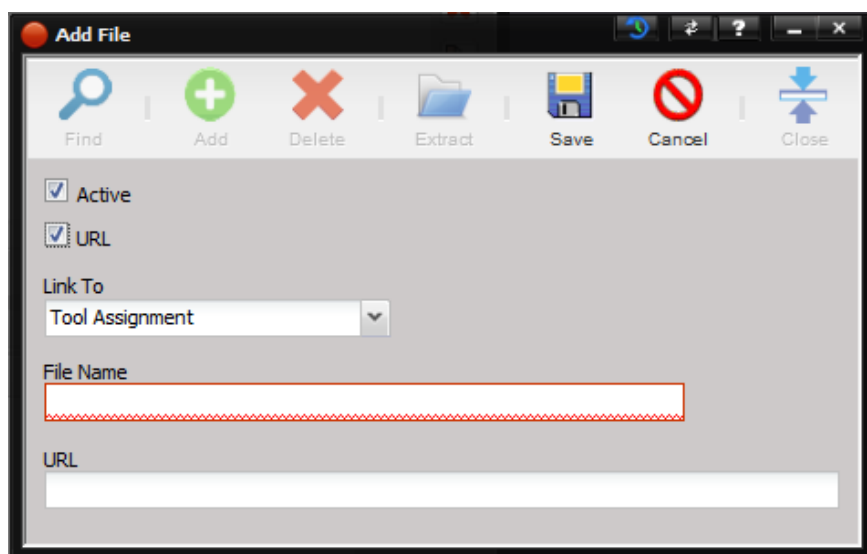
The Add File screen is displayed. Notice the 'Link To' field contains the value of "Tool Assignments".

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the "Browse..." button.



The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Tool Assignments Files tab.

- To enter a URL, check the URL checkbox, check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.



Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Tool Assignments Files tab.

Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select “X” button on the right of the Files tab.

Viewing a File

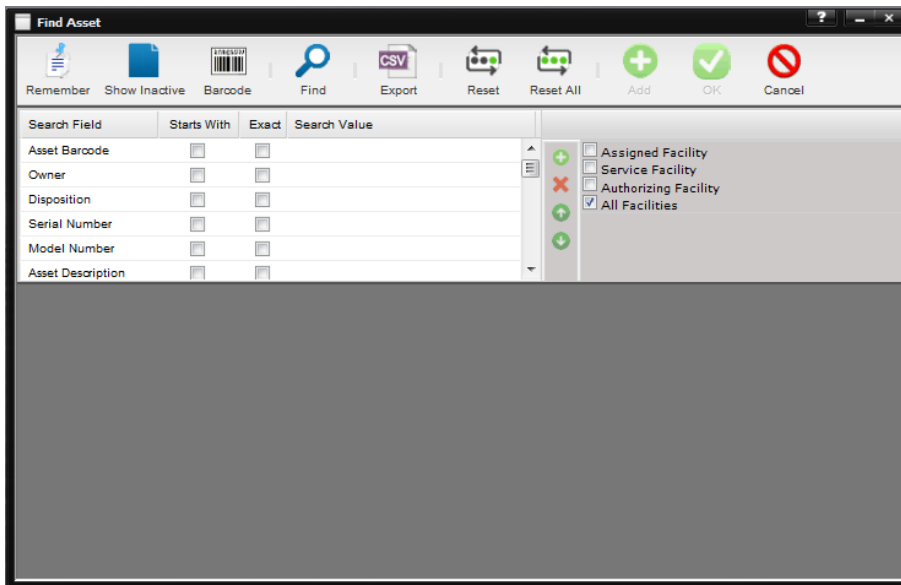
To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

Combine Work Orders

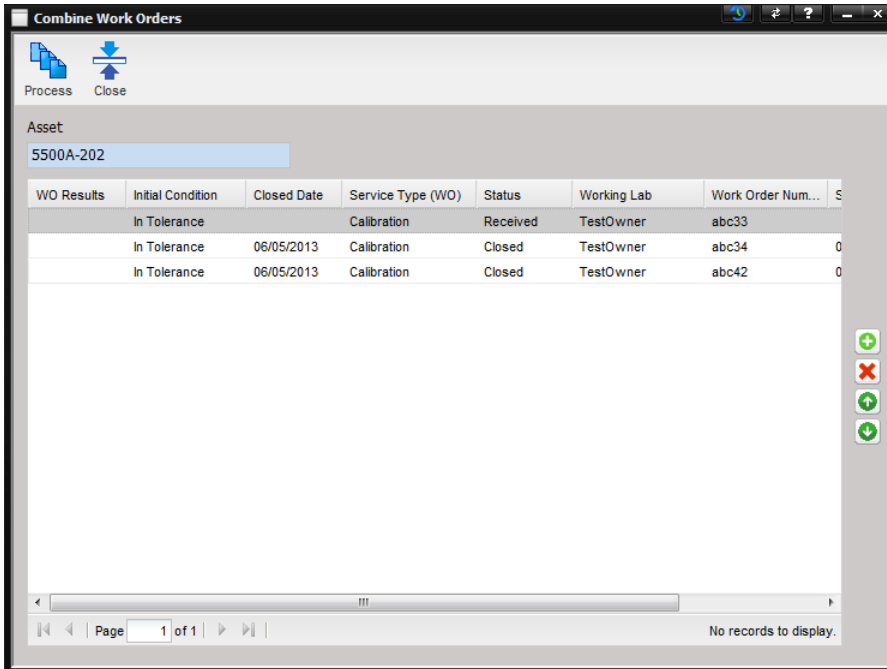
The Combine Work Orders option was used to combine Work Orders for one particular Asset. Although this capability can be used for any Work Order, it was only included for legacy purposes to be similar to the older MET/TRACK functionality. **This functionality is deprecated at this time and will be removed in future versions.**

MET/TEAM natively supports having multiple results sets against a single Work Order. Based on this fact, the method you should be using is to simply Add Results on the Work Order directly to the Open Work Order (see Work Order -->Add Results).

When the menu option is selected, the Find Asset screen is displayed for selecting the Asset whose calibrations will be combined.



The Combine Work Orders dialog is used to select and order the Work Orders that are to be combined.



- **Asset** – The Asset for which the Work Orders will be combined.
- **Asset Grid** – Contains the Work Orders that will be combined.
 - Use the “+” button to add this Asset’s Work Orders to the grid.
 - Use the “X” button to delete this Asset’s Work Orders from the grid.
 - Use the “↑” and “↓” buttons to move the Work Orders up and down in the grid.
 - Work Orders of any status can be added to the grid.

Note: The top Work Order is considered the MASTER Work Order.

The **Process** toolbar button creates the combined Work Order and opens that Work Order in edit mode.

- **Work Order Number** – The Work Order number of this newly generated Work Order. The number is appended with a “C” to designate this as a Combined Calibration.
- **Certification Number** – This number is the same as the Work Order number.
- Labor, Files, Accreditations and Parts are not added to the combined work order.
- The standards are a unique list based on all work orders that were combined. If standards were used on multiple Work Orders, each standard only appears once in the Standards grid on the Work Order Standards / Accreditations tab.

Standards					Accreditations		
Barcode	ID	Serial Number	Model Number	Next Maintenance	Number	Name	Type
SAMPLE-10	SAMPLE-10	10101010	10				
SAMPLE-5500	SAMPLE-5500	4820000	5500A	8/10/2012			
SAMPLE-5725	SAMPLE-5725	572500001	5725A				
FLUKE CORPOR...	FLUKE CORPORATION	NA	CALIBRATION				

- The data points are concatenated together from all the Work Orders.
- A Log Note is added to the Work Order from the MASTER Work Order. The new Log Note states the Master Work Order and all other Work Orders that were combined.

Save
Cancel
Close

Status: Combined
Date: 06/05/2013
Location: N/A
Log Note: This is a combined Work Order comprising:
Master Work Order Number: abc33
Work Order Number: abc34
Work Order Number: abc42
User: System Administrator

- All other data is copied from the MASTER Work Order.

My Work

My Work gives the technician a single place to go to manage non-maintenance labor time and assigned workload. My Work combines most of the common activities done by technicians, allowing them to review and get to work quickly.

Labor

Labor time entries are viewable on the left grid. The toolbar is used to add or delete non-maintenance labor time for the technician.

My Work – Add Labor

To add Labor, select the Add button on the toolbar and complete the information on the [Labor screen](#).

My Work – Modify Labor

To modify a time record, highlight the desired record in the grid and double click.

- **Start Date and End Date** – To view time records, the technician enters a starting and ending date. Once the dates have been selected, the appropriate time records are retrieved and ALL time records, maintenance and non-maintenance are displayed.
- **Technician** – MET/TEAM defaults to the currently logged in technician.
 - To view another technician’s work, select the “...” button.

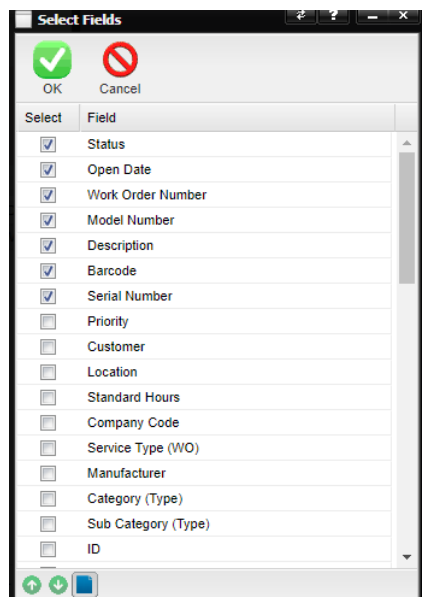
Note: In the event the manager does not want this functionality to be available this option can be secured.
- **My Time Grid (left grid)** – This grid shows all the time records for the selected technician based upon the dates selected.
 - If the time is from a Work Order, the “WO Time” box is checked. In order for time to be altered on a “WO Time” record, the technician must go to that Work Order.
 - To modify any of the time records, the technician double clicks the time record and the appropriate time record or Work Order is displayed.
 - If the Work Order has been closed, the technician cannot change the time record.
 - Grid records can be sorted by ascending or descending order by clicking on the header of the column.
- **My Work Orders Grid (right grid)** – Displays all of the Work Orders that have been assigned to the selected technician. To go to the Work Order, the technician double clicks the desired Work Order in the grid. Grid records can be sorted by ascending or descending order by clicking on the header of the column.

Customizing My Work Orders Grid


You can select which columns appear in the Work Order grid along with the order of the columns. Right click on the Work Order column header for a popup menu with the option **Manage Columns**.

Work Orders				
Status	Open Date	Work Order Number	Model Number	Descrip
In Work	07/12/2022	202200004	Manage Columns	Multime

By selecting **Manage Columns**, a list of fields available is displayed.




A check next to the field name will select the fields to display in the Work Order grid. You can use a right click on the list of fields to **Select All** or **Select none**.


The OK button  saves the selected fields for the logged in user. Each user can customize the columns for their login.


The Cancel button  closes the Select Fields screen without saving the any changes.

Moving Work Order columns

Moving the fields up and down in the list determines the order the columns appear in the Work Order grid.

The Move Up  button moves the highlighted field up in the list.

The Move Down  button moves the highlighted field down in the list.

The Show Inactive  button toggles showing and not showing checked fields.

While on the My Work screen, you can drag and drop the columns to customize the order of the columns. To move a column, left mouse click on the column header and drag it to the desired position.

Work Orders				
Status	Open Date	Work Order Number	Model Number	Descrip
In Work	07/12/2022	2022000041	11	Multime

Model Number

Printing My Work

Two types of reports can be printed from the My Work screen. A Labor report can be printed and a Work Order report can be printed.

The screenshot shows the 'My Work' interface. At the top, there are buttons for Add (+), Delete (X), Print (printer icon), and Close (blue arrow). The Print button has a dropdown menu open, showing 'Labor' and 'Work Orders'. Below the buttons, there are input fields for 'Start Date' (02/01/2022) and 'Assigned Tech' (John Doe). At the bottom, there are two tables: 'Labor' and 'Work Orders'.

Labor		
Date	Hours	WO Time
02/19/2022	2.50	<input checked="" type="checkbox"/>

Work Orders		
Status	Priority	Date Opened
In Work	3	07/12/2021

To print information from the Labor grid, select Labor after selecting the arrow by the Print button.

To print the information from the Work Orders grid, select Work Orders after selecting the arrow by the Print button.

Maintenance Menu

The Maintenance Menu contains options for creating and maintaining data elements. The menu items are: Assets, Types, Procedures, Facilities, Job Numbers, Parts, Data Sheet Templates, Files, and Accreditations.

Assets

Assets are individual serialized instruments associated with a Type. The Asset may or may not be subject to service while being tracked in MET/TEAM.

Edit Asset - 87-I, 87-I

Find Barcode Tree Bulk Change Receive Copy Add Delete Save Cancel Close

Asset Asset Characteristics History / Notes Files

Identification

ID: 87-I
Barcode: 87-I
Serial Number - A: 87001001
Customer: Fluke
Department: ...
Parent: 5500-I
Standard Type: ...
☒ Active
☒ Recalled Asset
☒ On Site
☐ Standard
☐ Not Tracked
☐ Optional

Scheduled Services

Due Date	Service Type	Service Date	Interval	Service Mode	Active
08/18/2021	Calibration	08/18/2020	12 Months	Calibration	<input checked="" type="checkbox"/>

Page 1 of 1 Showing 1 - 1 of 1

Physical Location

General

Disposition: In Service
Purchase Date: 10/06/2020
In Service Date: 07/15/2021
Warranty Date: 07/07/2021
Date Invented: ...
Invented By: ...

Asset
Description - A: DMM
Model Number - A: 87
Manufacturer - A: Fluke

Type
Description: DMM
Model Number: 87
Manufacturer - T: Fluke
Work Area: ...

Management
Assigned Facility: My Lab
Service Facility: My Lab
Authorizing Facility: My Lab
Group: 321111242
Assigned Contact: ...
Assigned Number: 202100000003
Assigned Date: 06/14/2021
Optional 1: ...

Update

The Barcode button allows for printing the Asset barcode for the selected Asset.

The Tree button opens a view into the asset hierarchy, showing parent and child assets and can be used to navigate up or down the hierarchy and load the selected asset.

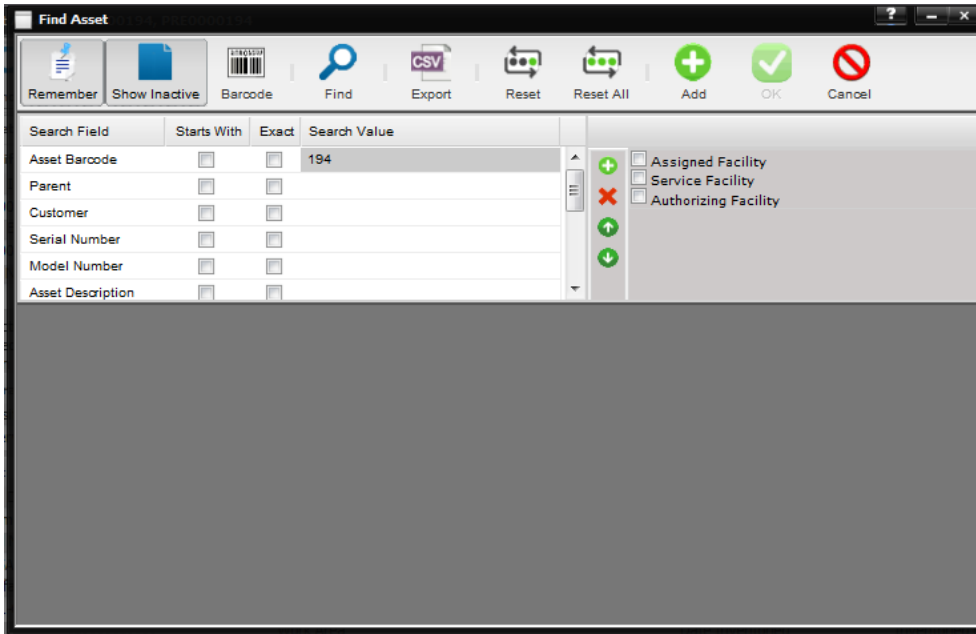
The Bulk Change button allows for updating of multiple Assets at one time.

The Receive button either performs the receiving functionality for the Asset including creating a Work Order or causes the Receiving screen to be launched with the source asset selected for receiving, depending on the state of the “Asset - Use Receiving Screen” System Default. This button is enabled only if the asset has no open Work Order, or if the System Default “Receiving – Allow Multiple Work Orders” is active. Note that if an asset is received by clicking this button and the “Asset - Use Receiving Screen” System Default is not active, the Work Order will be created without displaying any Receiving Note associated with the Type.

The Copy button allows for copying the current Asset. When this button is selected, the Add Asset* screen is opened. The border of the Add Asset* screen is yellow indicating that this screen is the copy. The border stays yellow until the screen is closed. The ID and Barcode are prefilled based on the System Default. The Serial Number, History and Tool Assignments **are not** copied. All other Asset information is copied. The Scheduled Services is viewable once the Save button is pressed.

Find Asset Dialog

When the Maintenance menu Assets submenu is selected, the Find Asset dialog is displayed. The functionality of the toolbar buttons is explained in the section Dialog Menu Action Buttons.



- If the Assigned Facility, Service Facility, and Authorizing Facility check boxes are unchecked, the Find screen grid is populated with all Assets. (Inactive Assets will be shown in the grid if the “Show Inactive” button is toggled on.)
- If the Assigned Facility check box is checked, only Assets with an Assigned Facility matching the Facility you are logged into are displayed in the Find screen grid.
- If the Service Facility check box is checked, only Assets with a Service Facility matching the Facility you are logged into are displayed in the Find screen grid.
- If the Authorizing Facility check box is checked, only Assets with an Authorizing Facility matching the Facility you are logged into are displayed in the Find screen grid.
- If the Assigned Facility, Service Facility, and Authorizing Facility check boxes are checked, Assets with an Assigned, Service, or Authorizing Facility matching the Facility you are logged into are displayed in the Find screen grid.

Assets – Asset Tab

The Asset tab displays Asset information and the next services that are scheduled to be performed.

Asset		Asset Characteristics		History / Notes		Files	
Identification				Scheduled Services			
ID	Customer	Due Date		Service Type	Service Date	Interval	Service Mode
5500A-202	Cal Lab Inc						Active
Barcode	Department						
5500A-202							
Serial Number - A	Parent						
202							
<input checked="" type="checkbox"/> Active	<input checked="" type="checkbox"/> Standard	Standard Type		Physical Location			
<input checked="" type="checkbox"/> Recalled Asset	<input type="checkbox"/> Not Tracked	Working					
<input type="checkbox"/> On Site	<input type="checkbox"/> Optional						
General							
Disposition	Purchase Date	In Service Date	Warranty Date	Date Inventoried	Inventoried By		
In Service	07/01/2020	07/01/2020	07/01/2025				
Asset		Type		Management			
Description - A		Description		Assigned Facility		Assigned Contact	
Calibrator		Calibrator		My Lab			
Model Number - A		Model Number		Service Facility		Assigned Number	
5500A		5500A		My Lab			
Manufacturer - A		Manufacturer - T		Authorizing Facility		Assigned Date	
Fluke		Fluke		My Lab			
		Work Area		Group		Optional 1	
		Electronic					
Update							

Identification Section

- **Asset ID** – The Customer’s identifier for the Asset. This identifier is not required to be unique or the same as the Barcode, however this is recommended whenever possible. This field is typically used on reports provided to customers.
- **Asset Barcode** – The Lab’s unique identifier for the Asset. No two Assets can have the same barcode. If the user attempts to enter an existing barcode, a warning message appears and requires the user to enter a new barcode. This field is typically used in reports for use inside the Lab.
 - The Barcode can be changed by selecting the Quick Link button.
 - The Barcode is created using a counter that is incremented each time a new barcode is generated. The Prefix (if Active) and the Suffix (if Active) is appended to the number to form the complete barcode. If the Barcode total length exceeds the System Defaults "Barcode - Length", the barcode is truncated from the left side of the barcode. To ensure that the barcode isn't truncated, set the System Defaults "Barcode - Length" to a number large enough to account for the barcode counter growing. The Prefix and Suffix settings are also controlled by System Defaults: *Barcode – Prefix* and *Barcode - Suffix*.
- **Serial Number** – The manufacturer’s serial number.
- **Customer** – The company or entity that owns the Asset. The default Customer is initialized to the default facility of the user logged in.
 - The company can be changed by selecting the “...” button.
 - The company can be viewed by selecting the Quick Link button.
- **Department** – Based upon a system default this information represents one of two elements.
 - If the system default “DepartmentBypass” is inactive, the department must be a child facility of the Customer.
 - If the system default is active, the Department does not have to be a child facility of the Customer. The inactive state most commonly used to assign Assets to facilities that belong to an Asset pool or tool crib. The department would then indicate the facility that currently has possession of the Asset so the recall notice would go to the correct facility.
 - The department can be changed by selecting the “...” button.
 - The department can be viewed by selecting the Quick Link button.

- **Parent** – If not empty would indicate this Asset is part of a system or a child of another Asset.
 - The parent can be changed by selecting the “...” button.
 - The parent can be viewed by selecting the Quick Link button.
 - The parent field shows the Barcode for the parent asset.
- **Standard Type** – Classifies the standard. Can only be selected if the Asset is marked as a Standard.
- **Physical Location** – The last known physical location of the Asset.
- **Active** – If checked, the Asset is in an Active state and will be included when performing a typical search or Find. Normally, an Asset is only set as NOT active once it has been retired or disposed of. Assets that are NOT active are not included on the standard MET/TEAM Recall reports.
- **Recalled Asset** – If checked the Asset is included on the Recall reports.
 - Note:** The standard Recall reports will exclude any assets that have open Work Order records, regardless of the Recalled Asset state. There is no need to change this or the Disposition when a Work Order is created.*
- **On Site** – if checked, the Asset needs to have maintenance performed on site. Used for any item that cannot be sent in to the servicing facility.
- **Standard** – If checked the Asset is a maintenance standard and can be classified by the Standard Type.
- **Not Tracked** – If checked, the Asset is not tracked as a part of MET/TEAM. This Asset would not show up on recall or inventory reports. The Asset would exist in the system but not be accounted for. This kind of Asset usually pertains to expendable items such as screws, nuts/bolts, rubber gloves or un-serialized Assets such as desks, chairs, file cabinets, etc.
- **Optional** – A check box that can be customized for a specific use, by changing its label.

Asset and Type Sections

The **Asset** area is the local or customer Description, Model Number, and Manufacturer.

The **Type** area is the system or fact data Description, Model Number, Manufacturer, Authority, and Area. This data usually comes from an Authority on the data such as the manufacturer.

The different references allow the Service facility to have a general process for an Asset type. The Service facility may not care who the manufacturer or model is, they just calibrate all of the same “type” the same way. However, the customer needs to know the specific model. By allowing MET/TEAM to track both data aspects, the Service facility does not have to create a different type of record for each kind of model reducing data maintenance, labor, and errors within the Service facility. Additional data elements with the same functionality exist on the Asset Characteristics tab.

- **Description** – The description of the Asset.
 - When the Type is selected via the Type Description field, a prompted is displayed “Update all Asset data with current Type data?”.
 - If Yes is selected, *all Asset fields that have a related Type field* are updated using the information from the Type which includes the Accuracy and Uncertainty Notes.
 - If No is selected, only the Description, Model Number, Manufacturer under the Type column on the Asset screen are updated.
- **Model Number** – The manufacturer’s model designation of the Asset’s characteristics and capabilities.
- **Manufacturer** – The company that created the Asset.
- **Work Area** – The Area of the Service facility that would normally do the work on the Asset. Area may be an area such as “Electronic” or an area may be defined as a room or location. This information is used as a default to assist the MET/TEAM user in doing work load planning.
- **Update button** – Used to update the Asset data with the current Type data.

General Section

- **Disposition** – The current state of the Asset. This value is intended to be static and not frequently changed based on smaller events such as coming into the Lab for service. Therefore, the **standard** Dispositions are rather broad, *In Service*, *Out of Service*, *Lost*, and *Scrapped*. While in the Lab, the Work Order has its own status such as *In Work*, *Needs Repair*, *Awaiting parts*, *Awaiting Approval*, etc.

Note: *The standard Recall reports will exclude any assets that have open Work Order records, regardless of the Disposition state. Therefore, there is no need to change the Disposition when a Work Order is created.*

- **Purchase Date** – The date the Asset was purchased.
- **In Service Date** – The date the Asset was made Active and placed into service.
- **Warranty Date** – The date the warranty for this Asset expires.
- **Date Inventoried** – The date the Asset was last inventoried.
- **Inventoried By** – The person who last inventoried this Asset.

Management Section

- **Assigned Facility** – The Facility that assigns the Assets work. This Facility schedules this Asset as a part of the work load for itself or another Facility.
- **Service Facility** – The Facility that performs the service.
- **Authorized Facility** – The Facility that authorized the funding for the work to be done on this Asset.

Note: *Facilities that are not listed in one of these three categories do not have the ability to do work on this Asset.*

- **Group** – Used for reporting purposes and allows this Asset to be grouped with other Assets.
- **Assigned Contact** – The name of the contact this Asset is assigned to.
- **Assigned Number** – The assignment number of this Asset.
- **Assigned Date** – The date the Asset was assigned to the group.
- **Optional 1** – A character entry field that can be customized for a specific use, by changing its label.

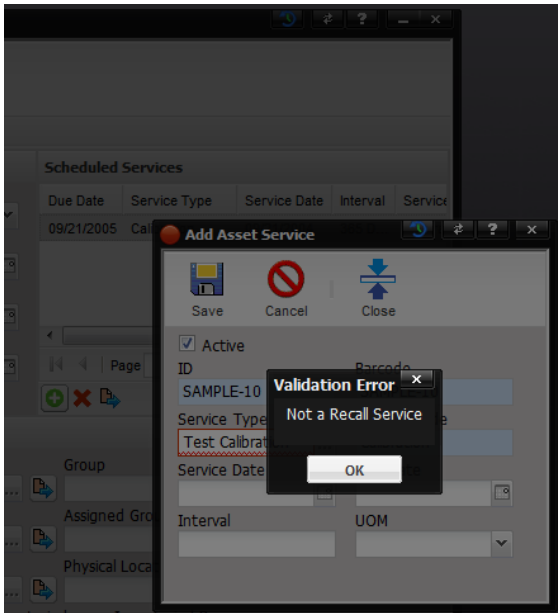
The **Assignment button** is used to view the Tool Assignment for this Asset. See Tool Assignment for a description of this functionality.

Scheduled Services

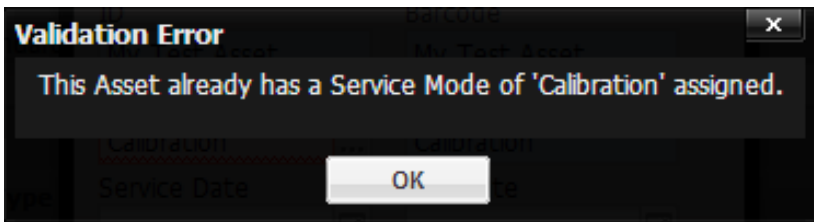
The Scheduled Services grid contains service information about the Asset. Use the horizontal scroll bar to view the other service information. For more information on Service Modes and Service Types, see the Setup menu Services submenu.).

The screenshot shows a software window titled "Scheduled Services". It contains a table with the following headers: "Due Date", "Service Type", "Service Date", "Interval", "Service Mode", and "Active". The table body is empty. To the right of the table are three icons: a green plus sign, a red X, and a blue arrow pointing right. At the bottom of the window, there is a pagination bar showing "Page 1 of 1" and a status message "No records to display."

When adding a Scheduled Service only Service Types designated as 'Recalled' can be used. If a Service Type that is not designated as 'Recalled' is used, an error message is displayed.



Only one record of Service Mode 'Calibration' can be displayed in this grid at a time. (A service of Service Mode 'Calibration' can be Service Type 'Calibration', 'Cal/Repair', or as setup by your System Administrator. If an attempt is made to add more than one record of Service Mode 'Calibration', a validation error is displayed.)



This validation error informs the user that only one record of Service Mode calibration can be in the Scheduled Services grid.

The service information about a calibration is displayed from the most recent service performed of Service Mode 'Calibration'.

For example, the Scheduled Service in the screen shot above is from the highlighted row on the History tab for this Asset as shown in the screen shot below. This service is displayed in the Scheduled Services grid as it is the most recently completed calibration for this Asset.

Asset Asset Characteristics History / Notes Files									
History									
Closed Date	WO Results	Initial Condition	Service Type (...)	Status	Service Date	Due Date	WO Number	Working Lab	
09/10/2004	Pass		Calibration	Closed	09/10/2004	02/27/2007	100037	MT	
07/02/2002	Pass		Calibration	Closed	07/02/2002	12/17/2004	100036	MT	
08/14/1999	Pass		Calibration	Closed	08/14/1999	08/14/2001	100035	MT	
08/14/1998	Pass		Calibration	Closed	08/14/1998	08/14/2000	100034	MT	
08/14/1997	Pass		Calibration	Closed	08/14/1997	08/13/1999	100033	MT	
08/13/1996	Pass	Found/Left	Calibration	Closed	08/13/1996	08/14/1998	100032	MT	
08/14/1995	Pass	As Left	Calibration	Closed	08/14/1995	08/14/1997	100031	MT	

Note: Only one service of Service Mode 'Calibration' can exist at one time. This service information is added to the Scheduled Services grid when the Work Order is completed and returned (closing the Work Order) for the Asset.

Service Mode of 'Calibration' cannot be added. Service Mode of 'Calibration' cannot be deleted from the Scheduled Services grid.

- **Due Date** – The date the Asset is due for maintenance.
 - If the calculated Due Date falls on a Calendar Non Workday, the Due Date is adjusted backwards to the next workday. For example, if the calculated Due Date was 8/1/2014 and 8/1/2014 has been marked in the Calendar as a Non Workday, the Due Date is recalculated to 7/31/2014.
 - When using MET/CAL, the date shown here is used to determine if the Asset used as a standard is in calibration.
- **Service Type** – The service type that was performed.
- **Service Date** – The next date the Asset is due for this type of service.
- **Interval** – Indicates the service interval.
- **Service Mode** – The mode of service performed.
- **Active** – Indicates if the Asset is active.

Note: Selecting an Interval UOM of 'None' requires the Interval to be set to 0. Standards with an interval of 0 and an Interval UOM of 'None' never need to be calibrated.

Assets – Asset Characteristics Tab

The Asset Characteristics tab displays additional information that can be collected for the Asset.

Asset				Asset Characteristics		History / Notes		Files	
Asset				Type		EX Data			
Stock Number				Stock Number		Property		Value	
Size				Size		First			
18 x 44 x 48 cm						Second			
Category (Asst)				Category (Type)		Date Moved			
Multifunction Calibrator						Storage			
Sub Category (Asst)				Sub Category (Type)		World			
						Material			
Family				Family		Shipper			
						Fax			
Class				Class		Extra		No	
						Gate			
Item Cost		Replace Cost		Item Cost		Replace Cost			
0.00		0.00		0.00		0.00			
Weight		Weight UOM		Weight		Weight UOM			
		lbs				lbs			
Dimensions		Quantity		Dimensions					
		1							
				Authority - T					
				Default - T					

Asset and Type

These are extended characteristics of the Asset. They model the same behavior as described above for the Asset tab.

- **Stock Number** - The stock number of the Asset.
- **Size** - The size of the Asset.

- **Category (Asst)** – The general category of the Asset. Could contain such data as Electronic, Dimensional, Mass, Laser, Flow, etc.
- **Sub Category (Asst)** – The sub category of the category for this Asset. Could contain such data as Power Meters, Handheld Meters, Scopes, etc.
- **Family** – Allows the user another field to specify like data for one or more Assets.
- **Class** - Allows the user another field to specify like data for one or more Assets.
- **Item Cost** – The purchase price of the Asset at the time of purchase.
- **Replace Cost** – The cost required to replace the Asset.
- **Weight** – The physical weight of the Asset, mainly used for shipping or determining how many people are needed to move the Asset.
- **Weight UOM** – Unit of measurement for the weight.
- **Quantity** – The quantity of items contained in this Asset. Allows for grouping Assets in a set. When billed by a standard price, the quantity is multiplied by the standard price.
- **Dimension** – The physical dimension of the Asset.
- **Authority** – The source of the data. Example would be Manufacturer, NAVAIR, NAVSEA, SYSCAL, etc.

EX Data

The EX Data grid tracks user defined Asset characteristics. In the event that MET/TEAM does not have a native data element required by the user, MET/TEAM has the capability to add and track additional Asset characteristics. These values can be modified by double clicking on the element in the grid. The user is then prompted to enter or edit the data. Value validations can be created for almost any data type.

Assets – History / Notes Tab

The History / Notes tab displays the service history and notes associated with the Asset.

Asset Asset Characteristics History / Notes Files								
History								
Closed Date	WO Results	Initial Condition	Service Type (...)	Status	Service Date	Due Date	WO Number	Working Lab
09/10/2004	Pass		Calibration	Closed	09/10/2004	02/27/2007	100037	MT
07/02/2002	Pass		Calibration	Closed	07/02/2002	12/17/2004	100036	MT
08/14/1999	Pass		Calibration	Closed	08/14/1999	08/14/2001	100035	MT
08/14/1998	Pass		Calibration	Closed	08/14/1998	08/14/2000	100034	MT
08/14/1997	Pass		Calibration	Closed	08/14/1997	08/13/1999	100033	MT
08/13/1996	Pass	Found/Left	Calibration	Closed	08/13/1996	08/14/1998	100032	MT
08/14/1995	Pass	As Left	Calibration	Closed	08/14/1995	08/14/1997	100031	MT

History

This grid shows all service events (Work Orders) recorded against this Asset. To view the event, double click the selected history event and MET/TEAM displays the Work Order. All history events are read only and cannot be changed by the user.

Notes

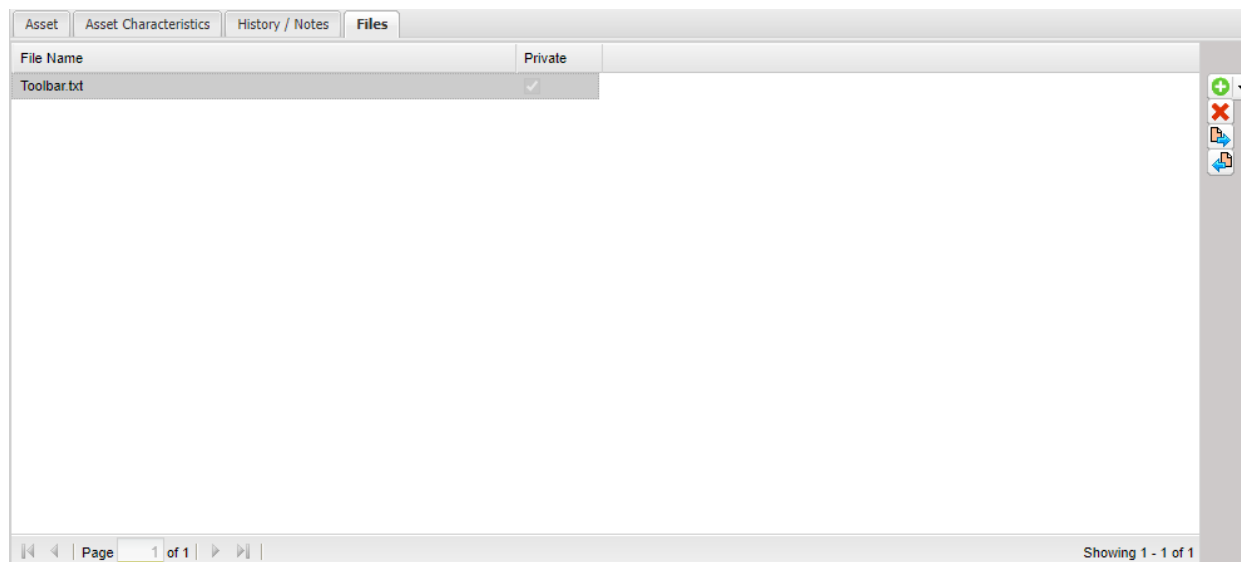
To add or modify any of the information in the Notes section, use the key combination ALT+Q. The quick note Select Note dialog is displayed. For a complete description of the quick note functionality refer to the section [Quick Notes](#).

- **Accuracy Notes** – Brought forward from the Asset Type file. The notes can be modified for this specific Asset if required here.
- **Uncertainty Notes** – Enter uncertainty notes. They will be brought forward from Types, but can be changed for individual Assets if needed.
- **Warranty Notes** – Specific notes about the warranty for this Asset can be entered here.
- **Notes** – These are general notes for this Asset.

These notes fields may be auto-filled with text that has been entered on Work Order. If changes are made on the Work Order, there are options to either update the Asset data, or leave as is. Refer to the System Default “Work Order – Update Notes” for more details.

Assets – Files Tab

The Files tab displays files related the Asset. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, or view files.



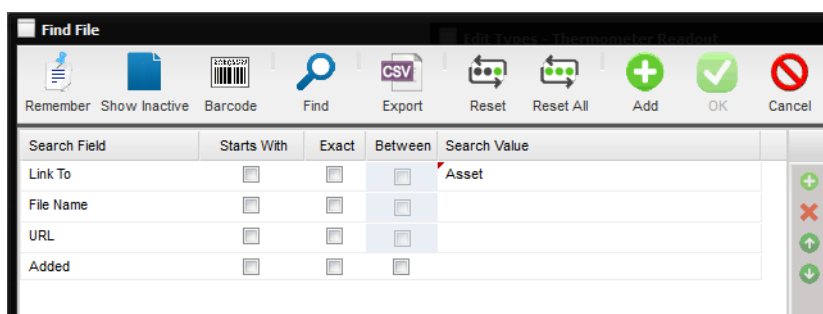
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.



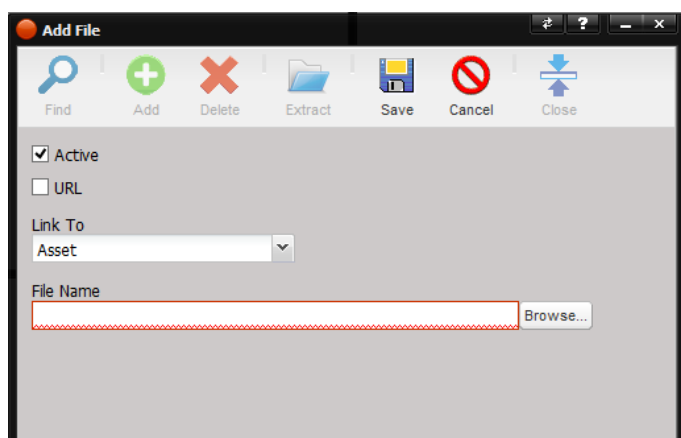
To attach an existing file to an Asset, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the 'Link To' search field contains the search value of "Asset". Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a 'Link To' entry of "Asset". Select the file to attach from the results grid and press OK.



To attach a new file or URL to an Asset, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Asset.

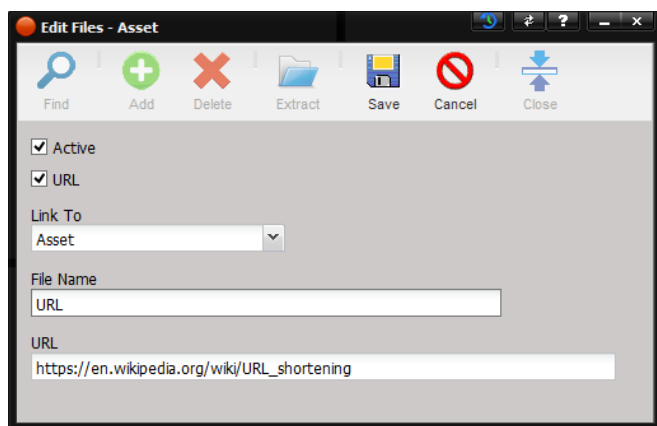
The Add File screen is displayed. Notice the 'Link To' field contains the value of "Asset".

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the "Browse..." button.

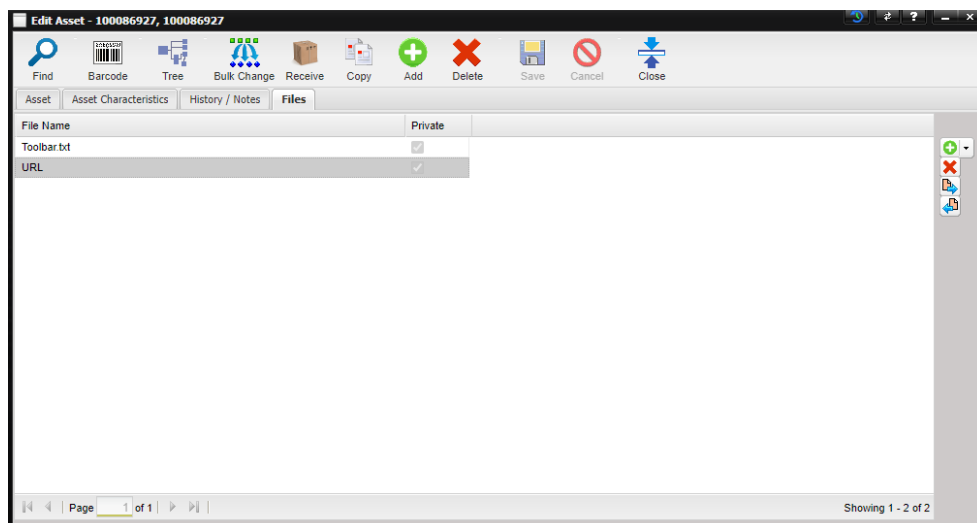


The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Asset Files tab.

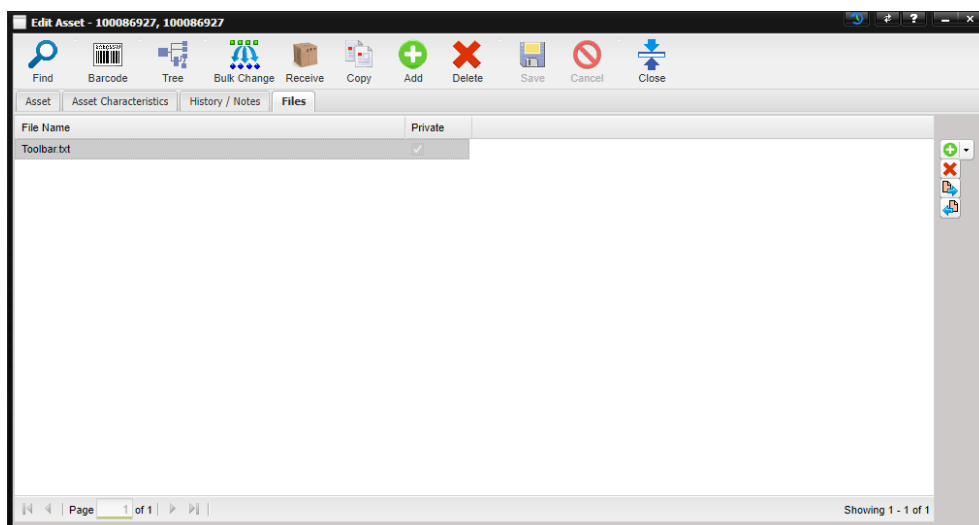
- To enter a URL, check the URL checkbox check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.



Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Asset Files tab.



When the Save button is selected, the new file is saved as a File, the Files screen is closed, the new file is attached to the current Asset and the Files grid refreshes on the Asset screen.



Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select “X” button on the right of the Files tab.

Viewing a File

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Changing Private Status of a File

The Private column in the Files grid indicates whether a file is private (cannot be seen or accessed in Customer Portal) or public (can be seen and accessed in Customer Portal). To change the Private status of a file, right-click the File Name in the grid (not the checkbox) and choose Make Private or Make Public from the popup menu accordingly. Also, double-clicking the File Name will display the same popup menu.

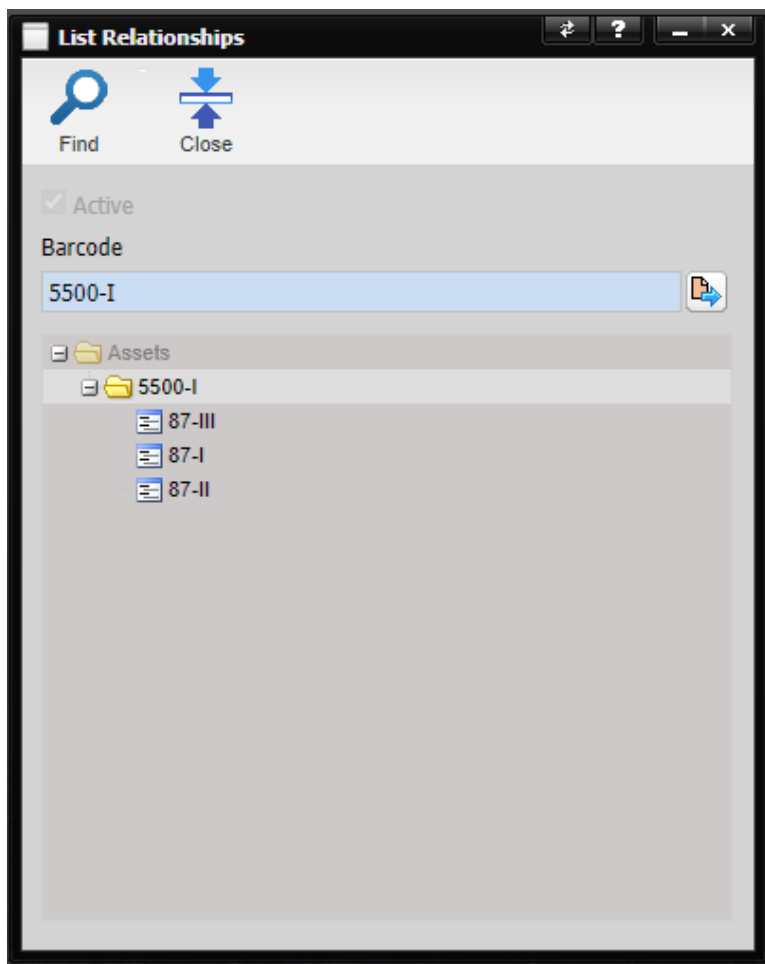
Asset Tree

The Asset Tree button displays the List Relationships screen which is a tree view of the relationship between a Parent and Child asset. The Active checkbox is checked if the highlighted Asset is active.

The **Barcode** field displays the Barcode of the highlighted Asset and whose relationships are being displayed (both Parent and Child). Clicking on any Asset in the tree updates the tree. Select the Quick Link button next to the Barcode field to display the Edit Asset screen for the selected Asset.

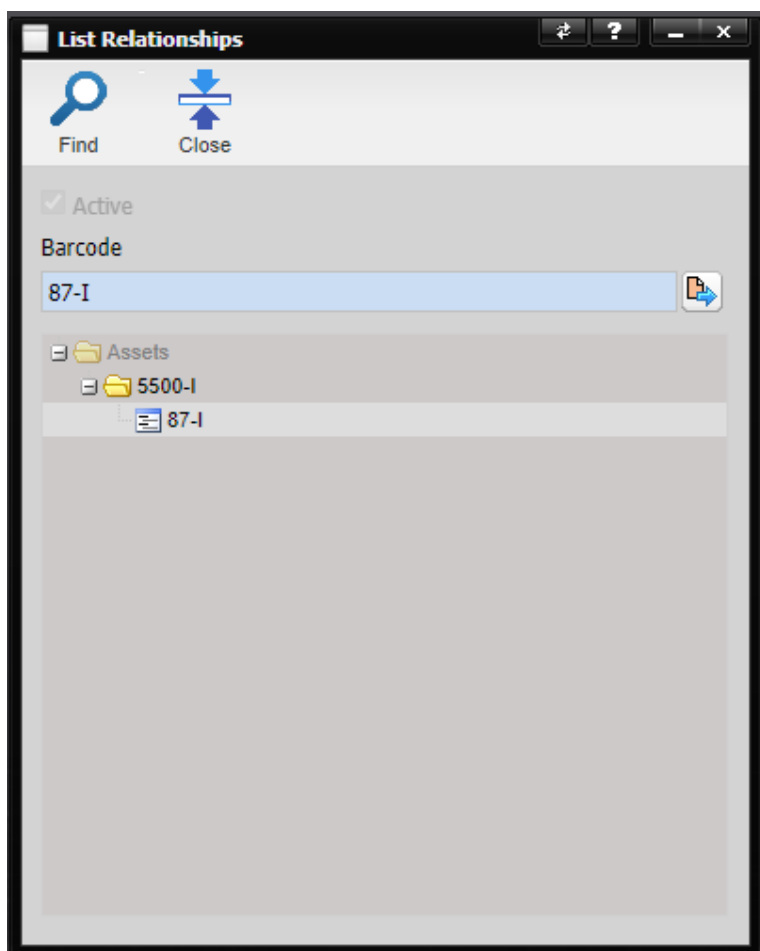
Example 1

In the Example 1 below, the 5500 calibrator is the Asset being displayed on the Asset screen when the Tree button was selected. The 5500 calibrator is the Parent for three 87 multimeters instruments.



Example 2

In the Example 2 below, one of the child calibrators (to the 5500 parent calibrator) is the Asset being displayed on the Asset screen when the Tree button was selected. The 87-I calibrator is one of the three child Assets associated with the 5500 calibrator.



Bulk Change

The Bulk Change button on the Asset screen allows updating multiple Assets at one time.

1. Find the Asset that will be the Master Asset using the Asset screen Find button. This is an Asset that has the desired data configured to update other Assets.
2. Select the Bulk Change button on the Asset screen
3. The Find screen is opened in “multi-select” mode. Select all Assets that you want to change to match the Master.
4. Select the Ok button.
5. The Bulk Change screen is displayed with the Assets from the Find screen listed in the grid. The Master Asset is identified above the grid of Assets.

Bulk Change

Process Close

Master Asset: 5500A-101

Customer	ID	Model Number	Manufacturer	Description	Due Date
Facility A	100086927	MSD6054A	Facility A	OSCILLOSCOPE 500 MHZ	08/24/2022
Facility A	100086928	MSD6054A	Facility A	OSCILLOSCOPE 500 MHZ	02/06/2022
Facility B	100100094	F00K102749	ETAS	ES650	

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Fields to update

Field	Copy
Accuracy Notes	<input checked="" type="checkbox"/>
Active	<input type="checkbox"/>
Asset	<input type="checkbox"/>
Assigned Facility	<input type="checkbox"/>
Assigned Group	<input type="checkbox"/>
Assigned Group Date	<input type="checkbox"/>
Authorizing Facility	<input type="checkbox"/>
Category (Asst)	<input type="checkbox"/>

☒ Standard Note
A message with the date, time, user and a list of the fields changed including 'from' and 'to' values will automatically be created for each record processed. If desired, use the box below to add any additional notes for each item processed.

Additional Note

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- a. Use the “+” button on the right side to add additional Assets to the list.
- b. Use the “X” button on the right side to remove Assets from the list.
- c. The Quick Link button on the right side can be used to view additional information for a highlighted Asset.
6. In the Fields to Update grid, on the bottom left of the screen, select the label of the fields you want updated. The Copy checkbox will be checked.
7. Repeat step 6 for all fields you want to copy from the Master Asset to the other Assets.
8. The Standard Note explains that a note is automatically added to the Assets that are being changed with the date, time, user, and a list of the fields changed including the “from” and “to” values when the Bulk Change is processed.
9. The Standard Note checkbox disables the automatically addition of the Standard Note information.
10. Add any additional information in the Additional Note field. This information is also added to the Notes field of the Asset. The Asset Notes can be viewed on the Asset History/Notes tab.
11. Select the Process button.

All items in the grid will be updated as designated on this screen.

Note: When updating the Customer or Department on an Asset, the change is propagated to its open Work Orders.

Types

Types are defined as a collection of basic characteristics for an item. These are most commonly referred to by a manufacturer’s model number. This model number references basic functionality, specifications, and features of an Asset. The Types screen contains various Data Fields and Tabs which are detailed below.

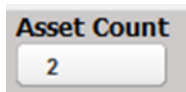
The Copy button allows for copying the current Type. When this button is selected, the Add Type* screen is opened. The border of the Add Type* screen is yellow indicating that this screen is the copy. The border stays yellow until the screen is closed. The Description is prefixed with the words “Copy of – “. All information related to the Type is copied **except** the associated Asset Count. The Procedures and Files are copied once the Save button is selected.

Data Fields

The Type screen contains Data Fields for entering information related to the Type.

Active (TPD)	Number	Procedure Name	Interval	UOM	Service Type (TPD)	Authority	Standar...	St
<input checked="" type="checkbox"/>	13	FLUKE 11: (1 YEAR) CAL VER /5700	12	Months	Calibration	Default	0.00	0.
<input checked="" type="checkbox"/>	5	VENDOR PROVIDED	12	Months	Calibration	Default	0.00	0.

- **Active** – Indicates whether or not this Type shows up on pick lists.
- **Description** – The text describing the Type.
- **Manufacturer** – the company that manufactured this instrument. Manufacturers cannot be added from this screen. They must be added using the Maintenance -> Facilities menu option.
 - The manufacturer can be changed by selecting the “...” button.
- **Model Number** – The number given to the Type by the manufacturer that references capabilities and specifications.
- **Size** – The physical size of the Type.
- **Stock Number** – The stock number of the Type.
- **Class** - Allows the user another field to specify like data for one or more Assets.
- **Family** – Allows the user another field to specify like data for one or more Assets.
- **Asset Count** – Indicates the number of Assets that are referenced to this Type.
 - To view the Assets, click the Asset Count button.






- The Find dialog is displayed.





Barcode	Owner	Serial Number	Model Number	Description	Manufacturer
PRE0000027	MT	B3A005	1529-R	Thermometer Readout	FLUKE

- Select the Find button and the Assets are displayed in the grid portion of the Find dialog.

-
- The screenshot shows the Microsoft Excel ribbon with the Font and Alignment tabs. The Font tab is active, displaying options for font face (Calibri), size (11), bold (B), italic (I), underline (U), text color, background color, and alignment (left, center, right, justified). The Alignment tab is also visible, showing options for horizontal and vertical alignment. Below the ribbon, a portion of the Excel spreadsheet is visible, showing columns A through G and rows 1 through 4. The data in the spreadsheet includes 'Barcode', 'Owner', 'Serial Nur Model No', 'Descriptic', and 'Manufacturer'.

- ### Types - Procedures Tab

Procedures		Notes	Extended Data	Files	Parts				
Active (TPD)	Number	Procedure Name	Interval	UOM	Service Type (TPD)	Authority	Standar...	St	
<input checked="" type="checkbox"/>	13	FLUKE 11: (1 YEAR) CAL VER /5700	12	Months	Calibration	Default	0.00	0.00	
<input checked="" type="checkbox"/>	5	VENDOR PROVIDED	12	Months	Calibration	Default	0.00	0.00	 



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active, the top-most active procedure in the list is used. Inactive procedures should be moved to the bottom of the list using the “↑” and “↓” arrows, but this is up to the discretion of the user.

Adding a Procedure

To add a procedure, select the “+” button on the right side.

- **Active (TPD)** – Marks this Procedure as active allowing users to select it during maintenance. (TPD) represents that the Active checkbox is from the Type Procedure Default screen.
- **Procedure Name** – The name of the Procedure. Procedures cannot be added from this screen. They must be added from the Maintenance -> Procedure menu option.
 - The Procedure can be selected or changed by selecting the “...”button.
- **Interval** – The duration used to calculate the date when the next service should be performed.
- **UOM** – The unit of measure for the interval.
- **Service Type (TPD)** – Defines the name of the service for this Procedure. (TPD) represents that the Service Type is from the Type Procedure Default screen.

Note: Service Type cannot be customized. The values in this dropdown are setup using the Setup menu Services submenu screen. The order of the Service Types in the dropdown is based on which Service Type was edited last using the Setup menu Services submenu.
- **Cert Format** – Contains the report file name for this Procedure.
- **Standard Hours** – The number of hours needed to perform this service.
- **Std Hours Type** – The type of standard hours: Average, Calculated, Manufacturer, and Default.
- **Std. Price** – The cost of performing the service.
- **ISOCert** – The cost for an ISO related service. This cost is added if the ISOCert check box is selected on the Work Order.
- **Data Sheet** – The name of the file used to record measurement points called out in the Procedure. The actual readings are stored on the Work Order for that maintenance event, not in the template.
 - The file can be changed by selecting the “...”button.
 - The file can be viewed by selecting the Quick Link button.

Types – Notes Tab

The Notes tab displays notes associated with the Type.

Procedures	Notes	Extended Data	Files	Parts
Accuracy Notes +1.0		Receiving Notes Always receive		
Uncertainty Notes		Type Notes		

- **Accuracy Notes** – The accuracy statement for this Type. It is carried forward to the Asset and can be used when opening new Work Orders.
- **Receiving Notes** – Special receiving instructions used to prompt the user when this type of Asset is received. Normally they would indicate special conditions such as specific leads, parts, or manuals needed in order to perform service on this Type. Note that if an asset is received by clicking the Receive button on the Edit Asset screen and the “Asset - Use Receiving Screen” System Default is not active, the Work Order will be created without displaying the Receiving Note to the user!
- **Uncertainty Notes** – Uncertainty notes which are carried forward to the Asset and used when opening new Work Orders.
- **Type Notes** – General notes about the Type. These are primarily used as reference for the technician.

Types – Extended Data Tab

The Extended Data grid tracks user defined Type characteristics.

Procedures	Notes	Extended Data	Files	Parts
Property		Value		
cField1				
cField2				

If MET/TEAM does not have a native data element required by the user, one can be added and tracked. (To manage Extended Data properties, see the section entitled Extended Data.) Extended Data property values can be modified by double clicking on the element in the grid. The user is prompted to enter or edit the value. Validations can be created for almost any data type.

Must be Sub Contracted

Boolean:
☐ Checked if YES, unchecked otherwise

Save Cancel

For numeric fields, the precision and scale are indicated in parenthesis on the title bar.

Types – Files Tab

The Files tab displays files related to the Type. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, or view files.

Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.

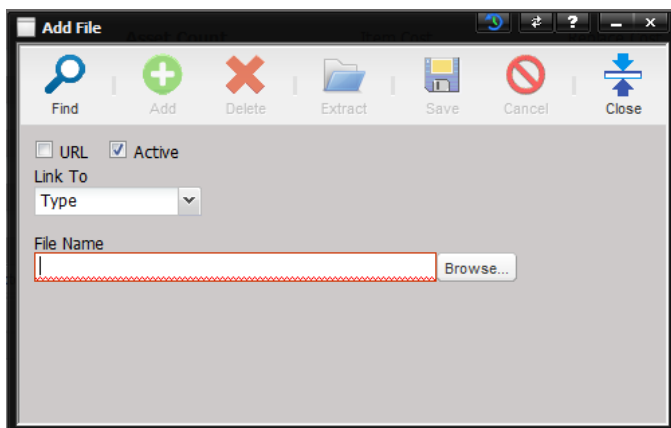
To attach an existing file to a Type, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the ‘Link To’ search field contains the search value of “Type”. Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a ‘Link To’ entry of “Type”. Select the file to attach from the results grid and press OK.

Search Field	Starts With	Exact	Search Value
Link To	<input type="checkbox"/>	<input type="checkbox"/>	Type
File Name	<input type="checkbox"/>	<input type="checkbox"/>	
URL	<input type="checkbox"/>	<input type="checkbox"/>	

To attach a new file or URL to a Type, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Type.

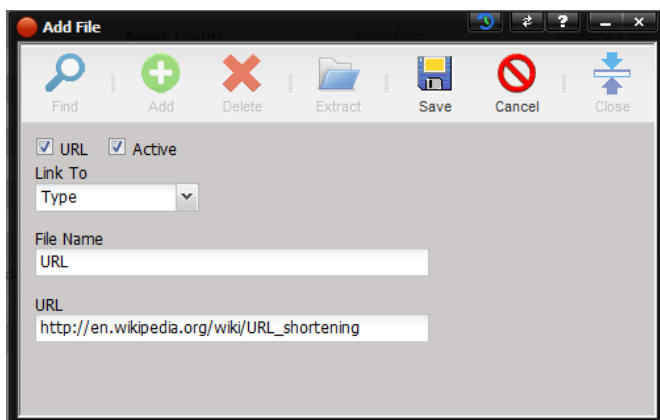
The Add File screen is displayed. Notice the 'Link To' field contains the value of "Type".

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the "Browse..." button.



The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Types Files tab.

- To enter a URL, check the URL checkbox, check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.



Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Type Files tab.

Edit Types - Boost Amplifier - III

Find Copy Add Delete Save Cancel Close

☒ Active

Description	Boost Amplifier - III	Asset Count	0	Item Cost	5,000.00	Replace Cost	5,200.00
Manufacturer	Fluke	Model Number	5725A	Category (Type)	42	Weight UOM	lbs
Size	5	Stock Number	82	Sub Category (Type)	Sub 1	Dimensions	14.25.82
Class	Air Force	Family	Absorkee	Image	CheckIn_1.PNG	Authority	Default
				Work Area	Mechanical		

Procedures Notes Extended Data **Files** Parts

File Name
Toolbar.txt
URL

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When the Save button is selected, the new file is saved as a File, the Files screen is closed, the new file is attached to the current Type and the Files grid refreshes on the Type screen.

Edit Types - Boost Amplifier

Find Copy Add Delete Save Cancel Close

☒ Active

Description	Boost Amplifier	Asset Count	1	Item Cost	0.00	Replace Cost	0.00
Manufacturer	Fluke	Model Number	5725A	Category (Type)	Amplifier	Weight UOM	lbs
Size		Stock Number		Sub Category (Type)		Dimensions	
Class		Family		Image		Authority	Default
				Work Area			

Procedures Notes Extended Data **Files** Parts

File Name
5725.PNG

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Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select "X" button on the right of the Files tab.

Editing a File

To edit the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

Viewing a File

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Types - Parts Tab

The Parts tab displays parts related to the Type. This can be used to estimate repair costs or establish a bill of materials (BOM). Parts added to a type are not removed from inventory, as these are used for reference only.

Procedures	Notes	Extended Data	Files	Parts
------------	-------	---------------	-------	--------------

Parts					
Item Cost	Part Number	Description	Manufacturer	Stock Number	Quantity
800.00	TR-01-01a	Transformer			1.00

<div> <div>⏪</div> <div>⏴</div> <div>Page</div> <div>1 of 1</div> <div>⏵</div> <div>⏩</div> </div>	Showing 1 - 1 of 1
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The part link can be updated to alter the quantity, via the *Modify selected Part Link* button.

The individual part record referenced can be viewed via the *Modify selected Part* button.

Procedures

The Procedures menu allows for adding or modifying instructions used to perform and record specific service actions against Assets within MET/TEAM.

Note: To view Manual Templates, select the Maintenance menu Manual Template option.

- **Active (Proc)** – Check if this is an active Procedure. If unchecked, this Procedure is considered inactive and is not displayed in pick lists.
- **Procedure Name** – Name of the Procedure as referenced by the technician.
 - For MET/CAL procedures...
 - If Procedure Sectioning is being used, the Procedure Name **MUST** reference the INSTRUMENT line of the main procedure.
 - If Procedure Sectioning is not being used, the Procedure Name **SHOULD** reference the INSTRUMENT line of the main procedure.
 - For Procedures that MET/CAL creates, the Procedure Name will always match the INSTRUMENT line of the main procedure.
- **Number** – Number assigned to the Procedure by the creator of the procedure.
- **Version** – The version of the Procedure
- **Procedure Date** – The date the Procedure was created.
- **Data Sheet** – The file that contains the data point collection mechanism.
 - The data sheet can be changed by selecting the “...” button.
 - The data sheet file can be viewed by selecting the Quick Link button.
 - If the procedure is not a MET/CAL procedure, this text box contains the Manual Template name, Excel spreadsheet file name, or any other file name that is the file generating the results.
 - If the procedure is a MET/CAL PXE procedure, the PXE file must be imported into the database as a File and then linked to the Data Sheet field using the “...” button. **Note: Importing PXE files using the URL option on the Files dialog is not supported at this time.**
- **Authority** – The entity that authorized the use of this Procedure.
- **Revision** – The revision of the Procedure.
 - For Procedures that MET/CAL creates, the Revision is set to the value of the Version property of the procedure’s project if it was defined, otherwise it is set to the REVISION line of the main procedure.
- **Revision Date** – The date of the revision.
 - For Procedures that MET/CAL creates, the Revision Date is set to the value of the Package Date property of the procedure’s project.
- **Procedure File*** – The name of the external file containing the actual verbiage (instructions) of the Procedure. Most commonly this data is kept in PDF or DOC formats.

- The procedure file can be changed by selecting the “...” button.
- The procedure file can be viewed by selecting the Quick Link button.
- **Approved by** – The person authorizing the use of this Procedure.

Note: *When an approver has been entered, the procedure will be locked upon save.*

When a procedure is locked, no changes are permitted until the procedure is unlocked via the Unlock button.

- **Service Type (Proc)** – The type of service the Procedure is used for.
Note: *Service Type cannot be customized. The values in this dropdown are setup using the Setup menu Services submenu screen. The order of Service Types in the dropdown is based on which Service Type was edited last using the Setup menu Services submenu.*
- **Category (Proc)** – The category of the Procedure.
 - The category can be changed by selecting the “...” button.
 - When the procedure is a MET/CAL procedure, the Category **MUST** be “MET/CAL”.
 - When using a compiled MET/CAL procedure, the Data Sheet and the Procedure File fields must be left blank. The Instrument Line of the compiled procedure must be entered into the Procedure Name field.
 - For compiled procedures, there are no other required selections. All other fields are user defined.
 - When using compiled procedures, each work station must be setup to point to the proper procedure directory by editing the procdir parameter of the metcal.ini file. If the work station cannot locate the desired procedure an error message is generated when the procedure is launched from MET/TEAM.

**All procedure templates and reference files are stored in the database. This allows the local administrator complete security and version control of the documents.*

When running MET/CAL from the desktop and selecting a PXE procedure file from the file system, MET/CAL will attempt to locate a matching procedure record based on the Procedure Name and Revision fields. These field values must match the selected INSTRUMENT line in the header of the main procedure file and the MET/CAL procedure project’s Version property value (or the value of the REVISION line in the header of the main procedure file if the Version property does not have a value) respectively. If an exact match is not found, a new Procedure record gets created.

In similar fashion, if an exact match of the selected PXE procedure file cannot be found based on the PXE filename and the checksum value of the file’s contents, a new File record gets created and linked to the new Procedure record.

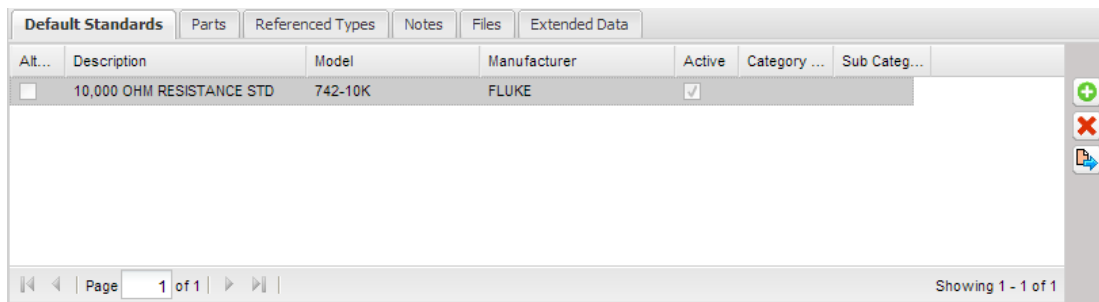
In addition, if the System Default setting “Create TPD Linkage From MET/CAL” is active, and the Procedure is not currently linked to the Type for the Asset being calibrated, this linkage is created.

Copying a Procedure

The Copy button allows for copying the current Procedure. When this button is selected, the Add Procedure* screen is opened. The border of the Add Procedure* screen is yellow indicating that this screen is the copy. The border stays yellow until the screen is closed. When a procedure is copied, all field values from the Procedure screen are applied to the new procedure, with the exception of the Data Sheet and Procedure File fields. Once the Save button is pressed, the data grids on the various tabs of the copied Procedure are populated as well, with the exception of the items on the Files tab, which are not copied. We recommend that you adjust the procedure name prior to saving, to reflect the purpose of the new procedure.

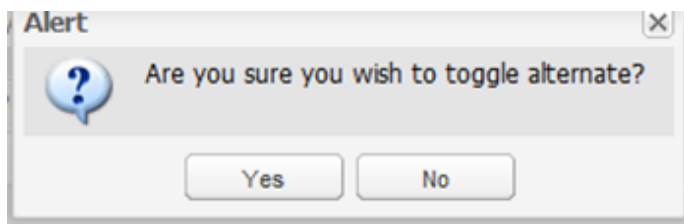
Procedures – Default Standards Tab

The Default Standards tab is for standard types used in the process of performing service on an Asset. These are not specific serialized Assets, just types.



This allows for a broad definition that can be used in any service facility without knowing what specific Assets are available to perform the Procedure. This drastically reduces the maintenance of equipment selection for this Procedure and helps the technician by reducing the amount of data entry. This process also ensures the same data is referenced through the lab and enterprise.

Standards can be set as an “Alternate” standard type by double clicking a standard type in the grid and answering “Yes” to the prompt. You can deselect the “Alternate” setting in the same manner.



The buttons to the right of the grid can be used to add, delete, or modify the default standard type.

Procedures – Parts Tab

The Parts tab displays a list of parts that may be used during the course of service and is intended to be used for forward planning.

The buttons to the right of the grid can be used to add, delete, or modify parts.

The Referenced Types tab provides a convenient way to view all the Types configured to use a specific procedure. A list of the Types that currently reference this Procedure is displayed. Using this tab is a quick way to see what Asset Types are affected by changes to this Procedure.

Type C...	Description	Model	Manufacturer	Active	Category ...	Sub Categ...
<input type="checkbox"/>	DIGITAL MULTIMETER	10	FLUKE	<input checked="" type="checkbox"/>		

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Procedures – Notes Tab

Default Standards

Parts

Referenced Types

Notes

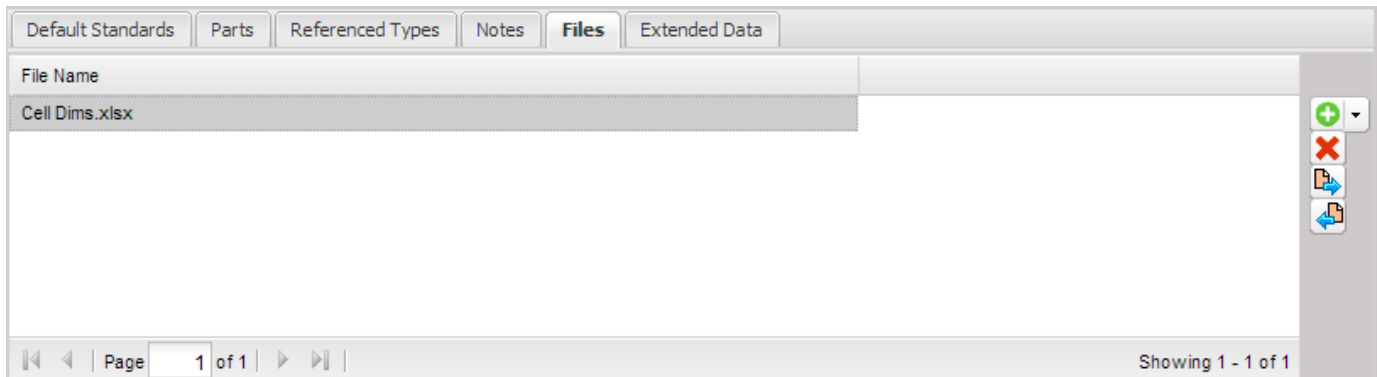
Files

Extended Data

Precise standard

Procedures – Files Tab

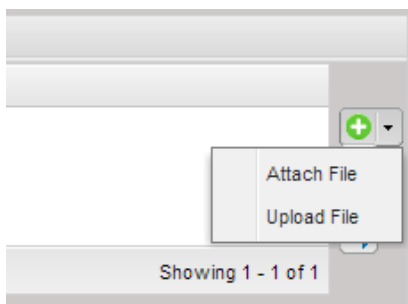
The Files tab displays files related the Procedure. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, or view files.



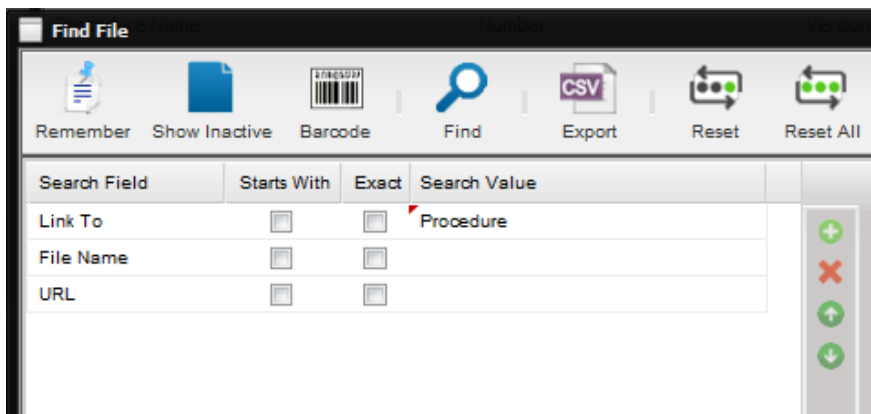
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.



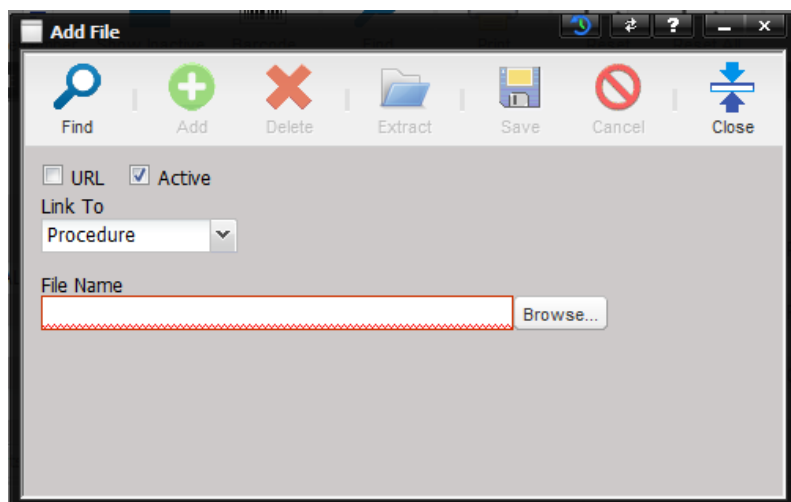
To attach an existing file to a Procedure, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the ‘Link To’ search field contains the search value of “Procedure”. Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a ‘Link To’ entry of “Procedure”. Select the file to attach from the results grid and press OK.



To attach a new file or URL to a Procedure, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Procedure.

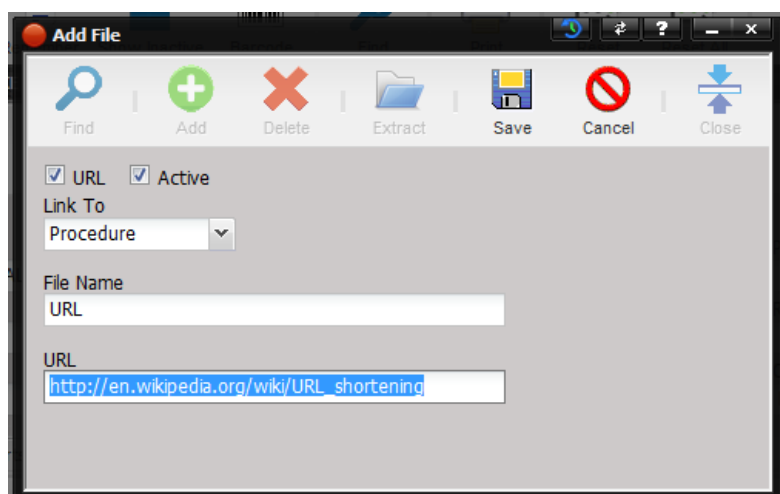
The Add File screen is displayed. Notice the 'Link To' field contains the value of "Procedure".

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the "Browse..." button.



The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Procedure Files tab. See screen shot below with the three files in the Files grid.

- To enter a URL, check the URL checkbox, check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.



Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Procedure Files tab.

Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select “X” button on the right of the Files tab.

Editing a File

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

Viewing a File

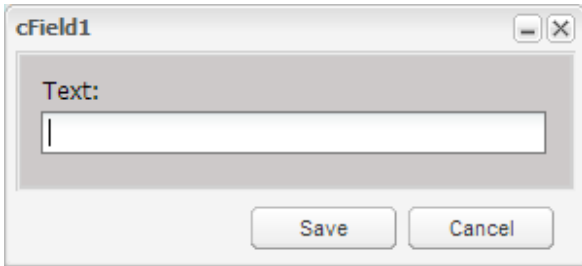
To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Procedures – Extended Data Tab

The Extended Data grid tracks user defined Procedure characteristics.

Default Standards		Parts	Referenced Types	Notes	Files	Extended Data
Property	Value					
cField1						
cField2						

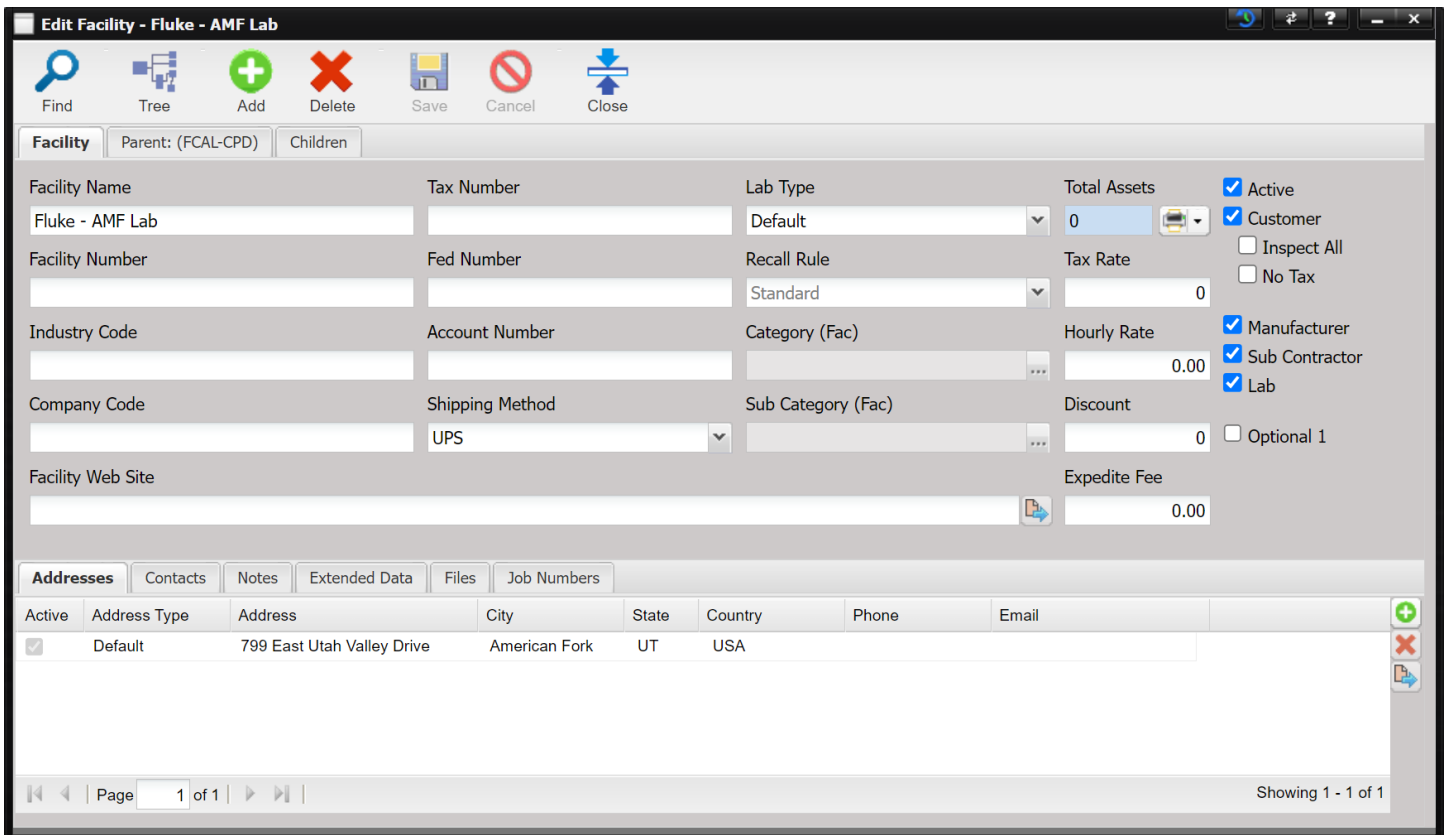
If MET/TEAM does not have a native data element required by the user, one can be added and tracked. (To manage Extended Data properties, see the section entitled Extended Data.) Extended Data property values can be modified by double clicking on the element in the grid. The user is prompted to enter or edit the value. Validations can be created for almost any data type.



A small dialog box titled "cField1" with a "Text:" label and a text input field. Below the input field are "Save" and "Cancel" buttons.

Facilities

Facilities are locations that exist, either physically or mythically. Facilities must be classified into one of the following categories: Customer, Manufacturer, Sub Contractor, or Lab. This screen contains both top and bottom tabs.



The "Edit Facility - Fluke - AMF Lab" screen displays various fields for facility information and a table for addresses.

Facility Tab:

- Facility Name: Fluke - AMF Lab
- Tax Number:
- Lab Type: Default
- Total Assets: 0
- Active: ☒
- Customer: ☒
- Inspect All: ☐
- No Tax: ☐
- Facility Number:
- Fed Number:
- Recall Rule: Standard
- Tax Rate: 0
- Industry Code:
- Account Number:
- Category (Fac):
- Hourly Rate: 0.00
- Manufacturer: ☒
- Sub Contractor: ☒
- Lab: ☒
- Company Code:
- Shipping Method: UPS
- Sub Category (Fac):
- Discount: 0
- Optional 1: ☐
- Facility Web Site:
- Expedite Fee: 0.00

Addresses Tab:

Active	Address Type	Address	City	State	Country	Phone	Email
<input checked="" type="checkbox"/>	Default	799 East Utah Valley Drive	American Fork	UT	USA		

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Facilities – Facility Tab

The Facility tab contains general information about the Facility that is being added, viewed, or modified.

Facility		Parent: (FCAL-CPD)		Children	
Facility Name	Tax Number	Lab Type	Total Assets	<input checked="" type="checkbox"/> Active <input checked="" type="checkbox"/> Customer <input type="checkbox"/> Inspect All <input type="checkbox"/> No Tax	
Fluke - AMF Lab		Default	0		
Facility Number	Fed Number	Recall Rule	Tax Rate		
		Standard	0		
Industry Code	Account Number	Category (Fac)	Hourly Rate	<input checked="" type="checkbox"/> Manufacturer <input checked="" type="checkbox"/> Sub Contractor <input checked="" type="checkbox"/> Lab	
			0.00		
Company Code	Shipping Method	Sub Category (Fac)	Discount	<input type="checkbox"/> Optional 1	
	UPS		0		
Facility Web Site			Expedite Fee		
			0.00		

- **Facility Name (required)** – The name of the Facility. We recommend the name be unique.
- **Tax Number** – The Facility's state or local tax number.
- **Facility Number** – The number issued to the Facility. This number could be a lab code, customer number, or other identifier.
- **Fed Number** – The Facility's federal tax id number.
- **Industry Code** – The code identifying this location within an industry, such as CAGE code.
- **Account Number** – The account number that can be linked to a bookkeeping system.
- **Company Code** – The code used to identify this Facility within a company.
- **Shipping Method** – The desired mode of shipment (user definable).
- **Facility Web Site** – The Facilities URL address on the internet.
- **Recall Rule** – The default recall rule used for this customer, standard choices include; Standard, End of Month, Beginning of Month, Previous Sunday. The recall rule will set the due date as described by the standard choices.
 - **Standard** – uses the interval only.
Example: If the Service Date is 10/11/2012 and the interval is 12 months, the Due Date should be 10/11/2013.
 - **Standard/No Print** – uses the interval only. Does not print the Due Date on the certificate report.
 - **End of Month** – extends the calibration due date to the end of the month.
Example: If the Service Date is 10/11/2012 and the interval is 12 months, the Due Date should be 10/31/2013.
 - **Beginning of month** – reduces the calibration cycle to the beginning of the month.
Example: if the Service Date is 10/11/2012 and the interval is 12 months, the Due Date should be 10/1/2013.
 - **Previous Sunday** – reduces the calibration cycle to the previous Sunday.
Example: if the Service Date is 10/11/2012 and the interval is 12 months, the Due Date should be 10/6/2013.
- **Customer** – Check if this Facility is a customer of the service facility. Enables the Tax Rate field. This checkbox cannot be customized because the functionality is associated with the Tax Rate field on this screen.
- **Manufacturer** – Check if this Facility is a manufacturer of equipment.
- **Sub Contractor** – Check if this Facility is a valid sub contractor.
- **Lab** – Check if this Facility is another calibration lab. This checkbox cannot be customized because the functionality is associated with the Inspect All field on this screen.

Note: A minimum of one Facility Type (Customer, Manufacturer, Sub Contractor, or Lab) must be selected prior to saving the Facility.

- **Active** – Check if this is an active Facility. If unchecked, this Facility is considered inactive and is not displayed in pick lists.
- **Optional 1** – Optional check box to be used for tracking Facility data.
- **Inspect All** – Check if this Facility requires inspection of all Assets.
- **No Tax** – Check if this Facility is exempt from tax application. This checkbox cannot be customized because the functionality is associated with the Tax Rate on this screen.
- **Lab Type** – System defined list of laboratory types (only used if the Facility is a lab).
- **Category (Fac)** – The general category of the Facility.
- **Sub Category (Fac)** – The sub category of the Facility.
- **Total Assets** – Displays the total number of Assets currently being tracked by MET/TEAM assigned to this Facility. This number includes active and inactive Assets. S
 - Selecting the View button displays a Crystal Report inventory list.
- **Tax Rate** – The rate of tax charged for services and goods sold. This field is enabled only when the facility is classified as a customer.
- **Hourly Rate** – Hourly Rate charged toward this Facility.
- **Discount** – Discount applied to this Facility.
- **Expedite Fee** – Fee charged per Asset to expedite for this Facility.

Note: Concerning Hourly Rate, Discount and Expedite Fee fields:

The Facility screen overrides the Lab Defaults. If any of the Hourly Rate, Discount and Expedite Fee fields are blank or set to “0” the Lab Defaults are used.

Facilities – Parent Tab

The Parent tab is located on the top row of tabs underneath the Tool Bar. The Parent tab title displays the name of the parent Facility name for quick reference. Information found on the Parent tab is read-only except for the Facility Name.

Facility			Parent: (FCAL-CPD)			Children		
Facility Name								
FCAL-CPD ...								
Facility Number								
Industry Code			Lab Type					
			Default					
Company Code		Shipping Method		Category (Fac)				
		UPS						
Facility Web Site		Recall Rule		Sub Category (Fac)				
		Standard						

- **Facility Name** – The name of the parent Facility. The name should be unique.
- The Facility Name can be changed by selecting the “...” button.
- **Facility Number** – The number issued to the parent Facility. Could be a lab code, customer number, or other identifier.
- **Industry Code** – The code identifying this location within an industry, such as CAGE code.
- **Company Code** – The code used to identify this Facility within a company.
- **Facility Web Site** – The parent Facility URL address on the internet.
- **Shipping Method** – The desired mode of shipment (user definable).

The Children tab is located next to the Parent tab on the top row of tabs underneath the Tool Bar. The Children tab displays a grid of Facilities that are children to this facility.

View the child facility information by highlighting the row in the grid and double clicking. If the Active check box is unselected, both active and inactive children are displayed.




The Addresses tab displays the physical addresses of the Facility. Many facilities have different billing and shipping addresses and MET/TEAM supports multiple addresses per facility. Grid records can be sorted by ascending or descending order by clicking on the header of the column.

The buttons to the right of the grid can be used to add, delete, or modify the address information. When adding an address, the Address dialog is displayed.

- **Type** – The type of address you are adding. Different contact types can be defined and then are used for specific reasons. Address types may include such choices as billing, shipping, or default.
- **Active** – Marks the address as active or inactive.
- **Address** – The physical address of the facility. Four lines are included to support government or military facilities.
- **City** – The city of the facility.
- **State** – The state of the facility.
- **Zip** – The Zip code of the facility (a postal code can be entered here as well).
- **Country** – The country of the facility.
- **Phone 1** – The primary phone number of the facility.
- **Phone 2** – The secondary phone number of the facility.
- **Fax** – The facsimile number of the facility.
- **Email** – The Email address of the facility (this field could also be used to store additional web site information such as technical support, or customer service).
- **Notes** – Notes for this facility address.

Facilities – Contacts Tab

The Contacts tab is for viewing contacts currently associated with the facility or for adding **new** contacts that will be associated with this facility. Contacts can be sorted by ascending or descending order by clicking on the header of the column.

Addresses Contacts Notes Extended Data Files Job Numbers							
A...	Type	First Name	Last Name	Description	Phone 1	Email 1	
<input checked="" type="checkbox"/>	Default	Brian	Coleman			brian.coleman@email.com	  

To add a **new** contact, select the “+” button. The contact will be associated with this Facility.
The Add Contact Screen is displayed for entering and then saving new Contact information.

Add Contact

Find Add Delete Save Cancel Close

☒ Active

Contact ID

First Name

Middle Name

Last Name

Suffix

Description

Notes

User

Fax

Phone 1

Phone 2

Email 1

Manager

Type

Extension

Cell Phone

Facility Name

Facility Number

Page 1 of 1

No records to display.

When a **new** Contact is added from this tab, the Contact is automatically associated with this Facility when the Save button on the Add Contact screen is selected.

If you view the Contact information using the Quick Link button, you will see the Facility in the grid at the bottom of the contact screen.

Edit Contact - Brian Coleman

Find Add Delete Save Cancel Close

☒ Active

Contact ID: 10032

First Name: Brian

Middle Name:

Last Name: Coleman

Suffix:

Description:

Notes:

User:

Fax:

Phone 1:

Phone 2:

Email 1: brian.coleman@email.com

Manager: Jack Benson

Type: Default

Extension:

Cell Phone:

Facility Name	Facility Number
Fluke - AMF Lab	
My First Customer	12345

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To de-associate a contact from this facility, select the "X" delete button from the right hand side of the Facility Contact tab.

To view information pertaining to a Facility, select the Quick Link button.

Facilities - Notes Tab

These are general notes about the Facility that are used for reference by the Service Facility.

Addresses Contacts **Notes** Extended Data Files Job Numbers

Lab is accredited.

To add a note, press the ALT+Q keys simultaneously. Refer to the section [Quick Notes](#) for additional details on notes.

Facilities – Extended Data Tab

The Extended Data tab tracks user defined Facility characteristics.

Addresses	Contacts	Notes	Extended Data	Files	Job Numbers
Property	Value				
cField18					
cField19					
cField20					
cField21					
cField22					

If a native data element required by a user does not exist, MET/TEAM has the capability to add and track additional Facility characteristics. These values can be modified by double clicking on the element in the grid. The user is then prompted to enter or edit the data. Value validations can be created for almost any data type.

Facilities – Files Tab

The Files tab displays files related the Facility. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, modify, or view files.

Addresses	Contacts	Notes	Extended Data	Files	Job Numbers
File Name					
Map of Building Location.pdf					<div>+</div> <div>×</div> <div>↻</div> <div>↺</div>
<div> <div>⏪</div> <div>⏩</div> <div>Page 1 of 1</div> <div>⏪</div> <div>⏩</div> </div>					Showing 1 - 1 of 1

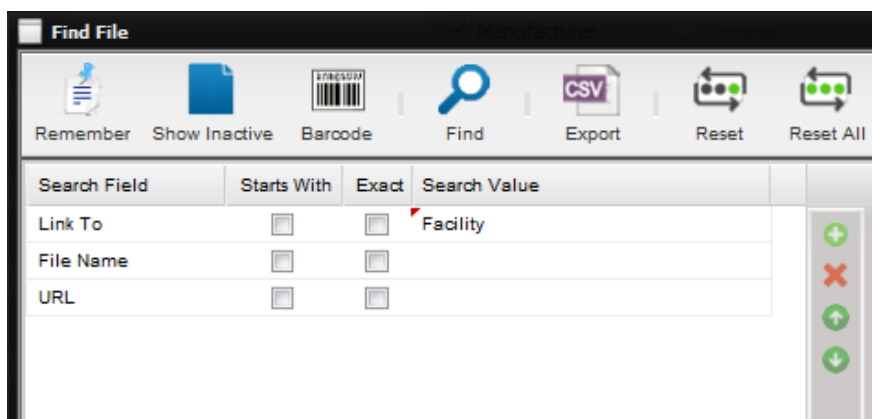
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.

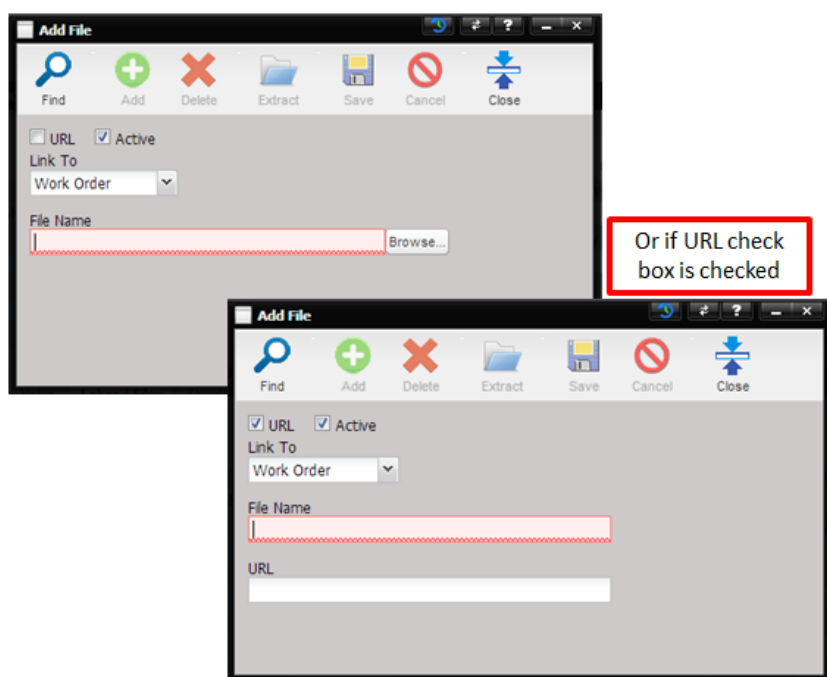


To attach an existing file to a Facility, select the Attach File option. The Find screen is displayed for finding the File to add. The Link To field is prefilled with “Facility”. Press the Find button. The displayed files are those files that were previously added using the Maintenance menu Files submenu and created with the Link To set to Facility. Select the file to attach from the results grid and press OK.

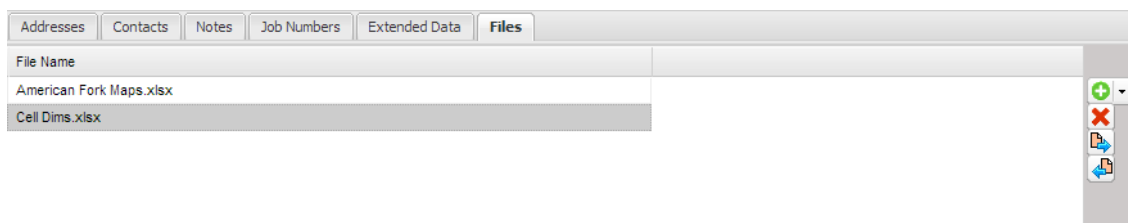


To attach a new file to a Facility, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Facility.

The Add File screen is displayed with the Link To “Facility” preselected from the dropdown. Select the Browse button to select the File to upload.



When the Save button is selected, the new File is saved as a File, the Files screen is closed, the new file is attached to the current Facility and the Files grid refreshes on the Facility screen.



Deleting a File, Modifying the File Link, Viewing the File


To remove a File, highlight the record in the grid on the Files tab and select the “X” button on the right of the Files tab.

To edit a File link, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Facilities – Job Numbers Tab

The Job Numbers tab lists all of the available Job Numbers for this Facility. Job Numbers can be sorted by ascending or descending order by clicking on the header of the column.

Addresses	Contacts	Notes	Extended Data	Files	Job Numbers		
Job Number	Default	Amount	Available	Start Date	End Date	Working Lab	
AMF-01	<input type="checkbox"/>	1,500.00	1,300.00			Fluke - American Fork Lab	

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To view information pertaining to a Job Numbers, highlight the row of the Job Number you want to view information about and then select Quick Link button on the right.

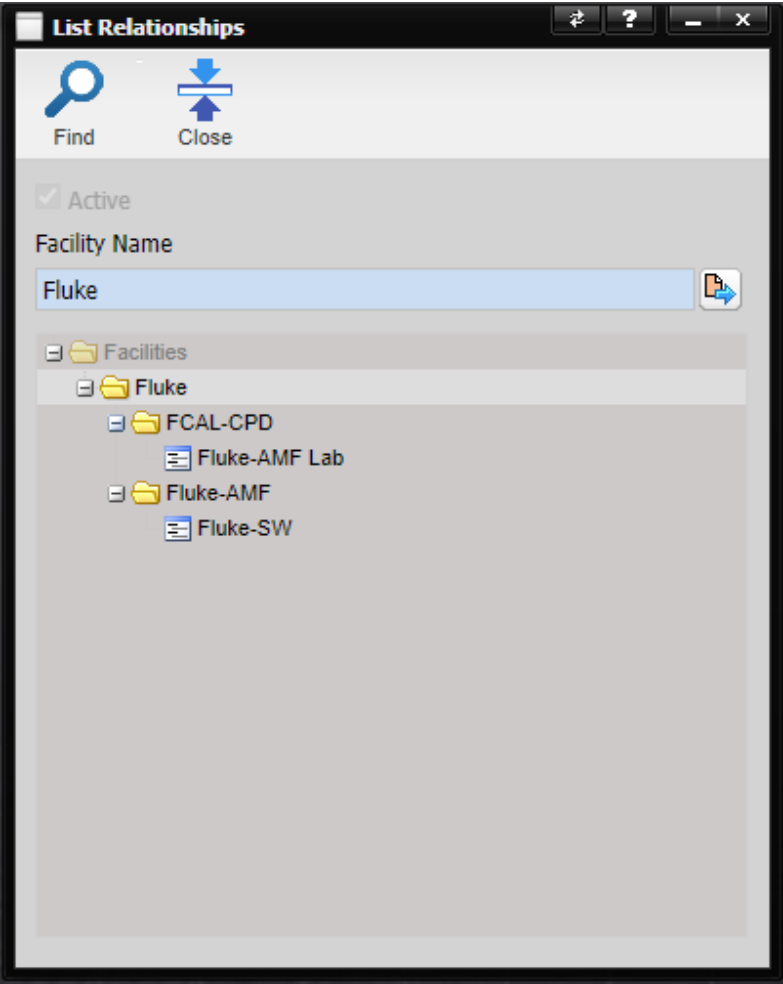
To add a Job Number use the Maintenance menu Job Numbers sub menu.

Facility Tree

The Facility Tree button displays the List Relationships screen which is a tree view of the relationship of the current facility to other facilities. The Active checkbox is checked if the highlighted Facility is active.

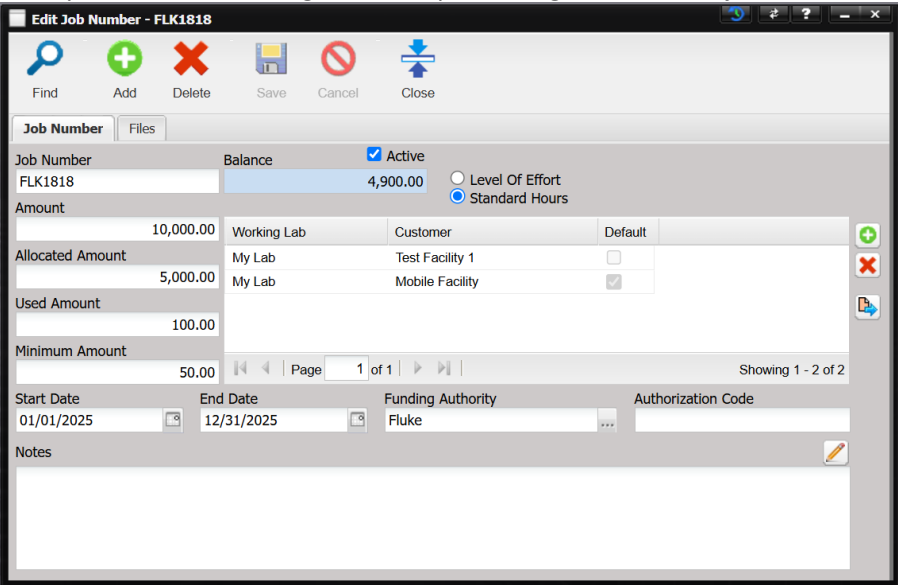
The **Facility Name** displays the name of the Facility that is highlighted and whose relationships are being displayed (both Parent and Children). Clicking on any Facility in the tree updates the tree.

Select the Quick Link button next to the Facility in the Facility Name text box to display the Edit Facility screen for the selected Facility.



Job Numbers

Job Numbers are funding lines used by the service facility for one or more customers. Job Numbers allow the service facility to track and manage funds expended against internal job numbers.



Job Numbers – Job Numbers Tab

The Job Numbers tab contains general information about the Job Number that is being added, viewed, or modified.

- **Active** – Checked if the job number is active. If inactive the users cannot select it to expend money against.
- **Job Number** – The number representing the job number issued by the funding source.
- **Balance** – The amount of funds left on the job number.
- **Level of Effort or Standard Hours** - Indicates the type of funding. (*see the Job Number Decrementing Methods flow chart for details*)
- **Amount** – The initial amount of the funding.
- **Allocated Amount** – The estimated amount of funds reserved for items currently under service.
- **Used Amount**– The amount of funds committed or expended against this Job Number.
- **Minimum Amount** – *Warning amount*. If the amount available falls below this limit, the user is prompted during receiving.
- **Start Date** – The date the job number is available for use.
- **End Date** – The date the job number expires.
- **Funding Authority** – The facility that opened the funding (the funding owner).
- **Authorization Code**– Authorizing code issued by the funding authority.
- **Notes** – Notes about the job number.
- **Facilities** – Grid of facilities that are allowed to use this job number.

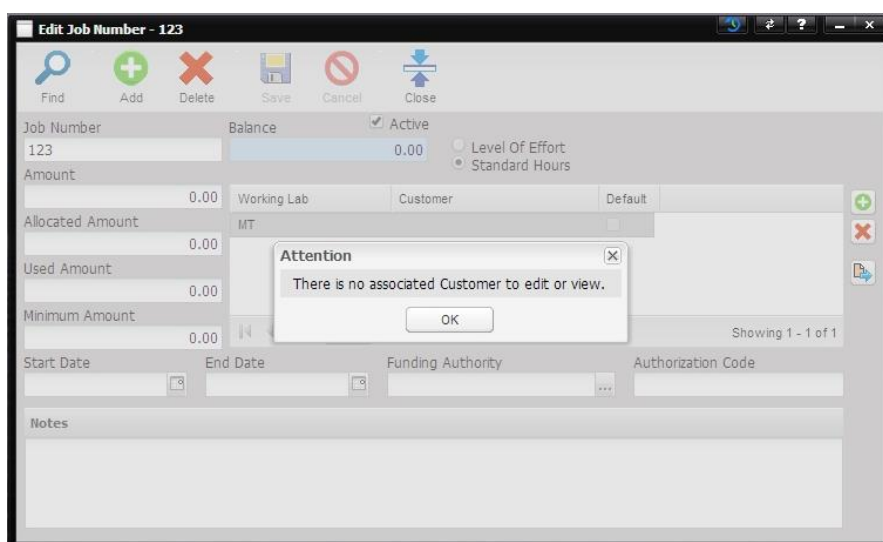
Adding Facilities to Job Numbers

To add a Facility to this job number, begin by selecting the “+” button. When the Facility Job Linking screen is displayed, select the “...” button next to the Customer text box. Select the desired Customer and then the Save button. The facility is added to the Facility Management grid.

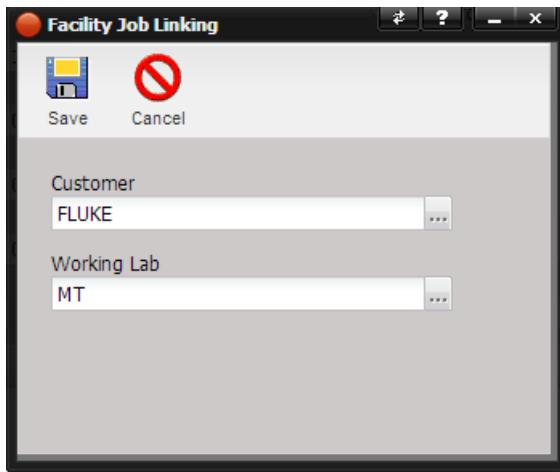
To remove a facility, select the “X” delete button.

To view information pertaining to a Facility, select the Quick Link button on the right of the Working Lab grid.

- If the Working Lab does not have an associated Customer name and the Quick Link button is selected, the following message is displayed.



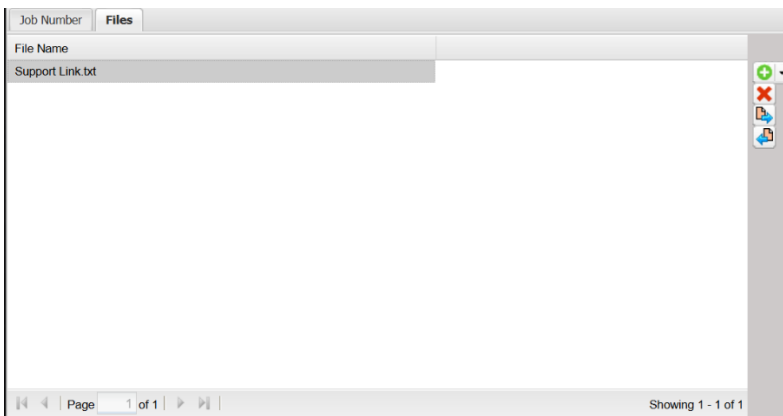
- To enter a customer, the Working Lab must be deleted. Highlight the Working Lab that does not have a customer. Select the “X” on the right hand side of the grid. Now use the “+” button to add a Working Lab making sure to select a Customer on the Facility Job Linking screen.



Facilities can be sorted by ascending or descending order by clicking on the header of the column.

Job Numbers – Files Tab

The Files tab displays files related the Job Numbers. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, modify, or view files.



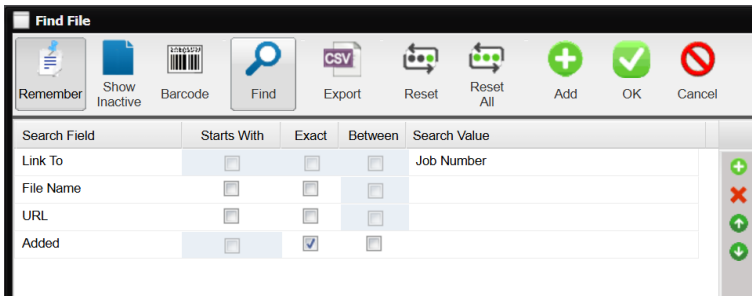
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.



To attach an existing file to a Job Number, select the Attach File option. The Find screen is displayed for finding the File to add. The Link To field is prefilled with “Job Number”. Press the Find button. The displayed files are those files that were previously added using the Maintenance menu Files submenu and created with the Link To set to Job Number. Select the file to attach from the results grid and press OK.



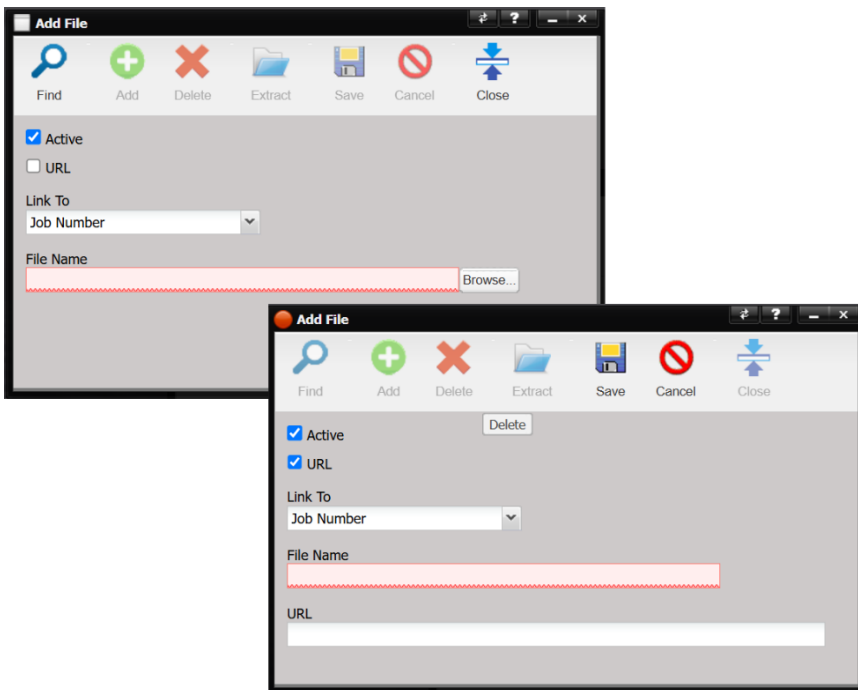
The 'Find File' dialog box features a toolbar with icons for Remember, Show Inactive, Barcode, Find, Export (CSV), Reset, Reset All, Add, OK, and Cancel. Below the toolbar is a search criteria table:

Search Field	Starts With	Exact	Between	Search Value
Link To	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Job Number
File Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
URL	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Added	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

On the right side of the table, there are three vertical buttons: a green plus icon, a red X icon, and a green down arrow icon.

To attach a new file to a Job Number, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Job Number.

The Add File screen is displayed with the Link To “Job Number” preselected from the dropdown. Select the Browse button to select the File to upload.



Two 'Add File' dialog boxes are shown. The top dialog box has a toolbar with Find, Add, Delete, Extract, Save, Cancel, and Close buttons. It includes checkboxes for 'Active' (checked) and 'URL' (unchecked), a 'Link To' dropdown menu set to 'Job Number', and a 'File Name' text field with a 'Browse...' button. The bottom dialog box is similar but includes a 'Delete' button above the 'Active' checkbox and an additional 'URL' text field below the 'File Name' field.

When the Save button is selected, the new File is saved as a File, the Files screen is closed, the new file is attached to the current Job Number and the Files grid refreshes on the Job Number screen.



The 'Files' tab is active, showing a grid with the following data:

Job Number	Files
	File Name
	Support Link.txt

On the right side of the grid, there are three vertical buttons: a green plus icon, a red X icon, and a green down arrow icon.

Deleting a File, Modifying the File Link, Viewing the File

To remove a File, highlight the record in the grid on the Files tab and select the “X” button on the right of the Files tab.

To edit a File link, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Units

The Units option is used to manage units associated with measurements. Units can be setup using this menu option. The MET/TEAM default database contains many commonly used Units. See below for a list of the default Units.

- **Active** – If checked, the Unit is available on the Units pick lists.
- **Prefix** – The prefix of the Unit of measurement.
- **Base Unit** – The Unit of measurement.
- **Unit Symbol** – The symbol used for the Unit of measurement which is automatically generated by concatenating the prefix and base unit.
 - **For example:** if μ is entered for the prefix and V for the base unit, the Unit Symbol will be μV .
- **At Temperature** – The temperature as which the Unit is applicable.
 - **For example:** when used in pressure units At Temperature would be inHg@60F
- **Reference Impedance** – Used to convert dBm to Watts or volts and visa-versa.

Default Database Units

Default Database Units
<blank>
°C
°F
°R
°Ré

°Ro
μA
μF
μs
μV
μW
A
bar
C
F
GHz
H
hPa
Hz
inHg
K
kHz
kPa
kV
kW
mA
mbar
mF
mH
mHz
MHz
mPa
MPa
mS
ms
mTorr
mV
MV
mW
MW
nF
ns
nV
nW
Ohms
Pa

pF
psi
pV
S
s
Torr
V
W

Note: The <blank> unit is used by MET/TEAM for unit less values. Because MET/TEAM functionality is dependent on this Unit value, the fields on the Edit Unit screen cannot be edited when it is selected.

Here is how it looks on the Find screen.

Unit Symbol	Base Unit	Prefix
μV	V	μ
A	A	
Hz	Hz	
kHz	Hz	k
V	V	

Parts

The Parts option is used to manage expendable items used in the process of service. Parts can be setup using this menu option and then added to Types, Procedures, Work Orders, Quotes, Invoices and Shipments.

Find Part Dialog

When the Find Part screen is displayed from the Maintenance menu Parts submenu or from the Part screen Find button, a Current Lab checkbox is available.

Search Field	Starts With	Exact	Between	Search Value
Part Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Manufacturer	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Stock Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Category (Part)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

☐ Current Lab

- If the Current Lab is not checked, the search displays all parts for the set criteria.
- If the Current Lab is checked, the search results are filtered to parts with a Storage Lab that matches the logged in Facility.

Part Main screen

Edit Part - Multimeter IC Board

Find Copy Add Delete Save Cancel Close

Description: Multimeter IC Board

Part Number: IC-MM

Manufacturer: Fluke

Stock Number:

Storage Lab:

Location:

Class:

Group:

Category (Part):

Inventoried By:

Supplier:

Active: ☒ Active
Not Tracked: ☐ Not Tracked

Discontinued: ☐ Discontinued
Taxable: ☐ Taxable

On Hand: 10

Re-Order: 5

Last QTY: 15

Purchase Units:

Price: 7.50

Date Inventoried:

Cost: 3.00

Last Ordered:

Last Cost: 2.75

Notes: The part cost increased 2024-1-24

- **Description** – The description of the part.
- **Part Number** – The manufacturer’s number used to order the part.
- **Manufacturer** – The company that makes the part.
- **Class** – Describes the style or type of part.
- **Stock Number** – National Stock Number (NSN) as issued by FedLog.
- **Group** – Allows the user to enter a value to group parts.
- **Location** – The physical location where the part can be found.
- **Active** – If checked, the part is available on the parts pick lists.
- **Not Tracked** – If checked, the part is an expendable item not tracked, such as cotton swabs, alcohol, etc.
- **Discontinued** – If checked, the manufacturer no longer produces this part.
- **Taxable** – If checked, tax is charged when billing is run.
- **On Hand** – The quantity that is available for use.
- **Re-order** – The part is reordered when the on hand quantity reaches this amount.
- **Last QTY** – The amount last ordered.
- **Category (Part)** – The category of the part.
 - The category can be changed by selecting the “...” button.
- **Purchase Units** – The way in which this part is purchased.
- **Price** – The amount the customer is charged for this part.
- **Inventoried By** – The name of the person who last inventoried this item.
 - The inventoried by can be changed by selecting the “...” button.
 - The list of names that are selectable comes from the list of users.
- **Date Inventoried** – The date this item was last inventoried.
- **Cost** – The price last paid to purchase this part.
- **Supplier** – The vendor that this part is purchased from.
- **Last Ordered** – The date this item was last ordered.

- **Last Cost** – The amount the service facility paid the last time the part was purchased.

Parts - Notes Tab

The Notes tab is used for generic notes on the part. May contain data such as where the part can be purchased from or a contact point.

Parts - Extended Data Tab

The Extended Data tab tracks user defined part characteristics.

If MET/TEAM does not display a native data element required by user, the data element can be added and tracked using the Extended Data tab. These data elements can be modified by double clicking on the element in the grid. The user is prompted for the value.

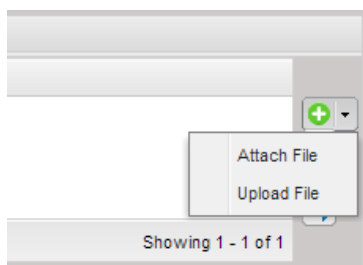
Parts - Files Tab

The Files tab displays files related the Parts. Files may be related either by Attach File (attaches an existing file) or by Upload File (uploading a new file). The buttons to the right of the grid can be used to add, delete, or view files.

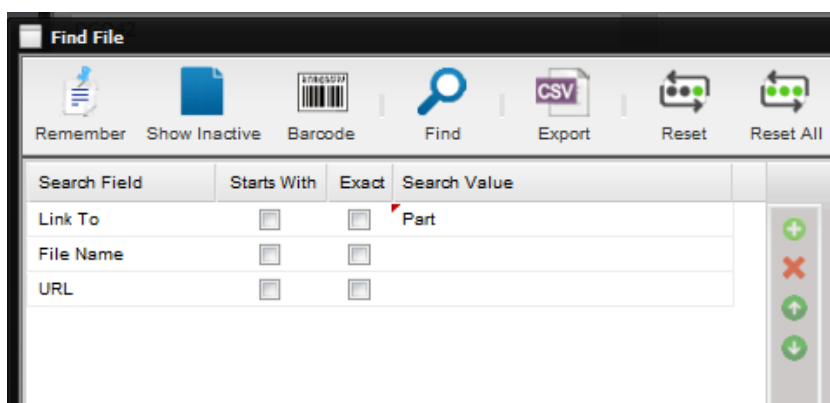
Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.



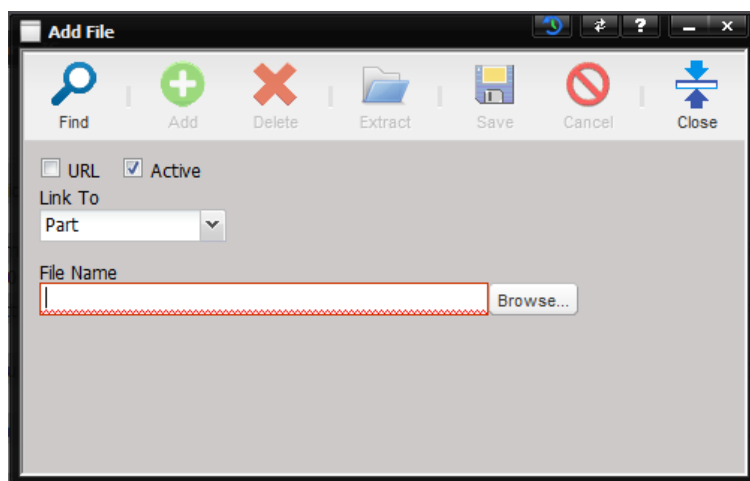
To attach an existing file to a Procedure, select the Attach File option. The Find screen is displayed for finding the File to add. Notice the 'Link To' search field contains the search value of "Part". Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and were categorized with a 'Link To' entry of "Part". Select the file to attach from the results grid and press OK.



To attach a new file or URL to a Part, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the current Part.

The Add File screen is displayed. Notice the 'Link To' field contains the value of "Procedure".

- To upload a file, leave the URL check box unchecked, check the Active check box, and press the "Browse..." button.



The Windows Choose File to Upload screen is displayed. Navigate to the file that is needed and select this file by double clicking. The File Name text box now contains the name of the file just selected. Select the Save button and the Add File screen closes. The file just uploaded is now displayed on the Parts Files tab.

- To enter a URL, check the URL checkbox check the Active check box, enter a filename in the File Name text box, and enter a URL in the URL text box.

Add File

Find Add Delete Extract Save Cancel Close

☒ URL ☒ Active

Link To
Part

File Name
URL

URL
http://en.wikipedia.org/wiki/URL_shortening

Select the Save button and the Add File screen closes. The URL File Name is now displayed on the Procedure Files tab.

Edit Part - IC

Find Copy Add Delete Save Cancel Close

Description
IC

Part Number
9028-1006-1862

Manufacturer Class
Category (Part)

Stock Number
Group
11:621612069

Storage Lab
Supplier

Location

Notes Extended Data **Files**

File Name	On Hand	Re-Order	Last QTY
URL	0	0	0
Toolbar.txt			

Price 0.00
Cost 18.85
Last Cost 0.00

Deleting a File

To remove a File, highlight the record in the grid on the Files tab and select "X" button on the right of the Files tab.

Editing a File

To edit the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 3rd button) on the right side of the Files tab.

Viewing a File

To view the selected File, highlight the record in the grid on the Files tab and select the Quick Link button (the 4th button) on the right side of the Files tab.

Copying a Part

The Copy button makes a copy of the current Part. When this button is selected, the Add Part* screen is opened. The border of the Add Part* screen is yellow indicating that this screen is the copy. The border stays yellow until the screen is closed. When a part is copied, all field values from the part screen are applied to the new part, except for the following:

- On Hand
- Re-Order
- Last Qty
- Inventoried By
- Date Inventoried
- Last Ordered
- Storage Lab
- Location

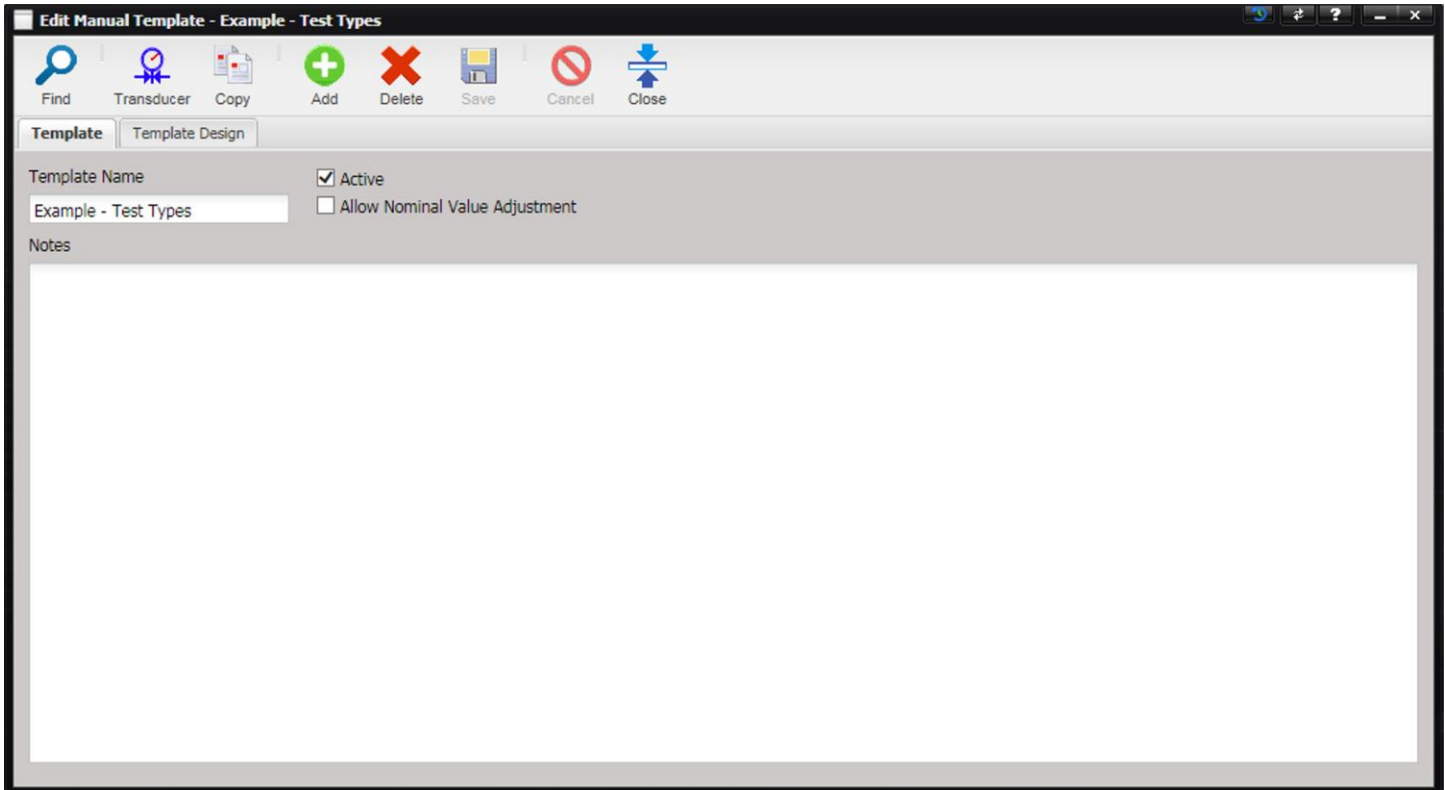
Once the Save button is pressed, the files data grid get populated as well. We recommend you adjust the part name to better describe the new Part prior to saving.

Manual Templates

The Manual Templates option is for managing manual data entry templates used for recording calibration data. These templates can be associated with a Type and accessed on the Work Order screen to collect and record calibration data.

Select the Add button on the Find Manual Template screen to create a new Manual Template. The Add Manual Template screen is displayed.

Or, select the Find button to find a template to modify. The Edit Manual Template screen is displayed.



Manual Template Toolbar

The Manual Template toolbar contains some buttons that are unique to the Manual Template screen. All the buttons are explained below.

Find – Allows you to find existing Manual Templates.

Transducer– Puts the template in *transducer mode* which allows reference information to be entered. The Ref Nominal and Ref Units columns are added on the Template Design tab.

Copy – Allows for copying the current Manual Template. The Copy button is only enabled after the current template has been saved. When this button is selected, the Add Manual Template* screen is opened. The border of the Add Manual Template* screen is yellow indicating that this screen is the copy. The border remains yellow until the screen is closed. The Template Name is prefixed with the words “Copy of”. All information related to the Manual Template is copied. After selecting the Save button, the new template is added to the database.

Add – Create a new blank Manual Template. The Add button is only enabled after the current template has been saved.

Delete – Deletes the current Manual Template. After deleting the template, the Manual Template screen is closed.

Note: *A Manual Template cannot be deleted if it is being used on a Work Order.*

Save – Saves the current Manual Template.

Cancel – Cancels any changes that have been made and updates the screen.

Close – Closes the Manual Template screen.

Manual Template – Template Tab

The Template tab is used to name the Manual Template, mark it as active, and enter any notes associated with the Manual Template.

Template

Template Design

☒ Active
☐ Allow Nominal Value Adjustment

Template Name
 Example - Test Types

Notes

- **Template Name (required)** – The name of the template displayed to the user during the selection process.
- **Active** – If checked, the template is active. By default only Active templates are displayed to the user.
- **Allow Nominal Value Adjustment** – Determines whether the Nominal column values are editable when using the template to perform a calibration. This option is not applicable to Transducer Manual Templates and is unchecked and disabled when the Transducer button is pressed.
- **Notes** – Comments or notes specific to this particular Manual Template.

Manual Template - Template Design Tab

The Template Design tab contains an editable grid allowing you to design the template.

Template		Template Design									
Source	Step #	Description	Label	Row Type	Nominal	Units	Low Limit	High Limit	Resolution	TUR	Uncertainty
No	1	General Tests		Bold Label							
No	2	Connector - Check threads are OK		Checkbox							
No	3	Noise	Is fan noisy?	Y = Fail							
No	4	Open Input Test	Is Reading betw...	Y = Pass							
No	5			Blank							
No	6	Performance Tests		Bold Label							
No	7	Frequency Measure		Inside Limit	12.00	MHz	10.00	13.20	2	4.86	
No	8	Residual Noise		<= Limit	6.50	µV		6.50	2	6.6	
No	9	Minimum Power		>= Limit	13.50	dBm	13.50		2	4.8	
No	10			Blank							
No	11	Enter case color		Enter Text							
No	12	Sample Report Label		Report Label							

<

>

To modify the Manual Template, right-click anywhere on the grid to display the popup menu.

Add Row
Copy Row
Remove Row
Update Formula
Delete Formula
Remove All
Resequence Steps
Step Wizard
Step Wizard (Transducer)

- **Source** – Select Yes or No from the drop-down list to indicate whether or not the data to be entered for this test is for a source instrument (Yes) or a unit under test (No). When this checkbox is checked, the error value calculation is reversed for that row, subtracting the DUT (device under test) value from the Nominal value.
- **Step #** – Enter a step number which will be referenced by the calibration technician when entering data for this test.
- **Description** – Enter a description for this test. If the Row Type is set to Report Label or Bold Label, the text in this column is printed on the report.
- **Label** – Additional descriptive information specific to this test row, optional.
- **Row Type** – Indicates the type of data to be entered for this test and allows for pass/fail limits to be specified.
 - **Blank** – Select this to make a blank row on the report.
 - **Inside Limit** – Creates a test that requires both high and low limits to determine pass or fail. The limits are based on the value in the *Nominal* column. Any calibration data entered for this test must be between the *High Limit* and *Low Limit* values specified to pass.
 - **<= Limit** – Creates a test that requires only a high limit to determine pass or fail. The limit is based on the value in the *Nominal* column. Any calibration data entered for this test must be below the *High Limit* value specified to pass.
 - **>= Limit** – Creates a test that requires only a low limit to determine pass or fail. The limit is based on the value in the *Nominal* column. Any calibration data entered for this test must be below the *Low Limit* value specified to pass.
 - **Y = Pass** – Creates a test that displays a dropdown list when entering data. If the technician selects “Yes”, the test was successful.
 - **Y = Fail** – Creates a test that displays a dropdown list when entering data. If the technician selects “Yes”, the test failed.
 - **Checkbox** – Creates a test that displays a dropdown list when entering data. This row type can be used like a checklist item – something that needs to be done or answered, but does not affect the pass/fail status of the results. If the technician selects “Yes”, the result of this row is saved as “Checked”. If the technician selects “No”, the result of this row is saved as “Unchecked”. The Description field for rows that use this row type should be worded as a question that requires a Yes/No answer.
 - **Report Label** – Uses the text entered in the Description field as a label on the report. No data is entered for this Row Type.
 - **Bold Label** – Uses the text entered in the Description field as a bold label on the report. This Row Type is good to use for section headers on the report. No data is entered for the Row Type.
 - **Enter Text** – Creates a text that allows the user to enter non-numeric data. This Row Type does not get evaluated for pass/fail. It can be used to simply record information.

Note: When viewed using the View Results screen, the data is presented in the Test Status column which allows this data to be presented on a report.

- **Inside Limit (!)** – Creates a test that requires both high and low limits to determine pass or fail. This Row Type is only applicable to Transducer templates. The limits are based on the value in the *Ref Nominal*

column. Any calibration data entered for this test must be between the *High Limit* and *Low Limit* values specified to pass.

- **<= Limit (!)** – Creates a test that requires only a high limit to determine pass or fail. This Row Type is only applicable to Transducer templates. The limit is based on the value in the *Ref Nominal* column. Any calibration data entered for this test must be below the *High Limit* value specified to pass.
- **>= Limit (!)** – Creates a test that requires only a low limit to determine pass or fail. This Row Type is only applicable to Transducer templates. The limit is based on the value in the *Ref Nominal* column. Any calibration data entered for this test must be below the *Low Limit* value specified to pass.
- **Ref Nominal** – The nominal value of the reference for this test. This column is only displayed on Transducer templates. For Row Types Inside Limit (!), <= Limit (!) and >= Limit (!), the Low Limit and High Limit values are with respect to the values in this column.
- **Ref Units** – The measurement unit of the Ref Nominal value. This column is only displayed on Transducer templates. For Row Types Inside Limit (!), <= Limit (!) and >= Limit (!), the Low Limit and/or High Limit values use these units.
- **Nominal** – The nominal value for this test. For Row Types Inside Limit, <= Limit and >= Limit, the Low Limit and High Limit values are with respect to the values in this column.
- **Units** – The measurement unit of the Nominal value for this test. For Row Types Inside Limit, <= Limit and >= Limit, the Low Limit and/or High Limit values use these units.
- **Low Limit** – The lower limit value used to determine pass/fail for this test. This column is only enable for Inside Limit, >= Limit, Inside Limit (!) and >= Limit (!) Row Types.
- **High Limit** – The upper limit value used to determine pass/fail for this test. This column is only enable for Inside Limit, <= Limit, Inside Limit (!) and <= Limit (!) Row Types.
- **Resolution** – The digits of precision used when displaying numbers on the screen for a test.
- **TUR** – The calculated Test Uncertainty Ratio for this test. If the value is <4, TUR shows on the report.
- **Uncertainty** – The determined uncertainty for the test row. The format of uncertainty values is dependent on the System Default setting Uncert Sign Digits. Refer to this setting in the System Defaults section for more information.

Example Manual Template

The default database that is installed with MET/TEAM contains sample Manual Templates. These sample templates can be used as a starting point when creating your own templates. Below is an example of a Manual Template.

Edit Manual Template - Example - Micrometer

Find Transducer Copy Add Delete Save Cancel Close

Template Template Design

Source	Step #	Description	Label	Row Type	Nominal	Units	Low Limit	High Limit	Res...	TUR	Uncertainty
No	1	Item is clean and undamaged		Checkbox							
No	2	Thimble moves freely		Checkbox							
No	3	Anvil face flatness		<= Limit	0.0	µInch		5.0	1		
No	4	Spindle face flatness		<= Limit	0.0	µInch		5.0	1		
No	5	Zero test		<= Limit	0.0	Inch		1.0	1		
No	6	Length tests		Inside Limit	0.1950	Inch	0.1949	0.1951	4		
No	7			Inside Limit	0.3900	Inch	0.3899	0.3901	4		
No	8			Inside Limit	0.5850	Inch	0.5849	0.5851	4		
No	9			Inside Limit	0.7800	Inch	0.7799	0.7801	4		
No	10			Inside Limit	1.0000	Inch	0.9999	1.0001	4		

Manual Template Row Add/Copy/Remove and Wizards

To manipulate the grid rows or display the Step Wizard, right click anywhere within the grid on the Template Design tab. A menu is displayed. Select the option you want to use.

Add Row
Copy Row
Remove Row
Update Formula
Delete Formula
Remove All
Resequence Steps
Step Wizard
Step Wizard (Transducer)

Add Row – Adds or inserts a new row below the currently selected row.

Copy Row – Copies the currently selected row and paste the new row below it.

Remove row – Removes the currently selected row.

Update Formula – Allows for changes to the specifications generated by the Step Wizard when editing a record. Records that have a formula associated are prevented from manual updates to the limits.

Update Formula

Save Cancel

Nominal: 50 Unit: kPa

Start: 10 End: 100

%Reading: 0.2 %FS: 0.025

☐ PPM ☐ PPM

Floor: Use the greater of %Reading and %FS errors

Resolution: 5

Update Formula (Transducer)

Save Cancel

Ref Nominal: 18 Unit: mA

Start: 4 End: 20

Output Start: 0 Output End: 100

%Reading: 2 %FS: 0.8

☐ PPM ☐ PPM

Output Units: °C

Floor: Use the greater of %Reading and %FS errors

Resolution: 3

Delete Formula – This menu option removes the formula for the limit calculation from the selected row. After the formula has been removed, the limits can be adjusted manually.

Row Type	Nominal	Unit	Low Limit	High Limit
Inside Limit	10.00000	kPa	9.97500	10.02500
Inside Limit	20.00000	kPa	19.96000	20.04000
Inside Limit	30.00000	kPa	29.94000	30.06000
Inside Limit	40.00000	kPa	39.92000	40.08000
Inside Limit	50.00000	kPa	49.90000	50.10000
Inside Limit	60.00000	kPa	59.88000	60.12000
Inside Limit	70.00000	kPa	69.86000	70.14000
Inside Limit	80.00000	kPa	79.84000	80.16000
Inside Limit	90.00000	kPa	89.82000	90.18000
Inside Limit	100.00000	kPa	99.80000	100.20000

Remove All – Removes all rows from the grid, leaving a blank template

Resequence Steps – After adding rows to an existing template, it may be desirable to regenerate the step numbers, so that they are in sequence and have neither gaps nor duplicates.

Step Wizard – Displays the Step Wizard screen which automatically generates rows based the criteria entered. All rows generated by the wizard are assigned the *Inside Limits* Row Type. Each field on the screen is described below. After populating the necessary fields, select the Save button to generate the tests. Select the Cancel button to abort using the Step Wizard.

The Step Wizard dialog box is shown with the following fields and values:

- Start:** 10
- End:** 50
- Step Size:** 10
- Unit:** mV (dropdown menu)
- %Reading:** 1.0
- %FS:** (empty)
- Floor:** 2.0
- Resolution:** 2
- PPM:** (unchecked checkbox)
- Use the greater of %Reading and %FS errors:** (unchecked checkbox)

- **Start (required)** – The nominal value for the first test step.
- **End (required)** – The maximum nominal value for the last test step. If the End value is not an exact multiple of the Step Size (offset by the Start value), the Nominal value of the last test will be the last multiple less the End value.
- **Step Size (required)** – The step size between each Nominal value.
 - Example 1: If the Start value is 10 and the End value is 50 with a Step Size of 10, the Nominal values will be 10, 20, 30, 40, and 50.

	Nominal	Units	Low Limit	High Limit	Resolution
t	10...		10.00	10.00	2
t	20...		20.00	20.00	2
t	30...		30.00	30.00	2
t	40...		40.00	40.00	2
t	50...		50.00	50.00	2

- Example2: If the Start value is 5 and the End value is 12 with a Step Size of 3, the Nominal values will be 5, 8, and 11.
- **Unit** – The measurement unit of the values for each test.
- **% Reading** – Indicates the percentage to use to calculate the specifications for each test as a percentage of each Nominal value.

- **%FS** – Indicates to use a percentage of full scale to calculate the test specification for each test. Note that the End value is used as the full scale value.
- **Floor** – Indicates the floor value for specifications. This value is added to the calculated specification for each test.
- **Resolution (required)** – Indicates the number of decimal places to use to format all values.
- **PPM** – If checked, the value entered is parts per million (PPM). If unchecked, the value entered is in percentage.
- **Use the greater of % Reading and %FS errors** – If checked, the greater of % Reading and %FS is applied to the calculated specification value for each test.

Step Wizard (Transducer) – Displays the Step Wizard (Transducer) screen which automatically generates rows for a transducer template based the criteria entered. All rows generated by the wizard are assigned the *Inside Limits* Row Type. Each field on the screen is described below. After populating the necessary fields, select the Save button to generate the tests. Select the Cancel button to abort using the Step Wizard (Transducer).

- **Start (required)** – The nominal input value for the first test.
- **End (required)** – The maximum nominal value of the last test. If the End value is not an exact multiple of the Step Size (offset by the Start value), the Nominal value of the last test will be the last multiple less the End value.
- **Step Size (required)** – The step size between each Nominal input value.
 - Example 1: If the Start value is 10 and the End value is 50 with a Step Size of 10, the Nominal values will be 10, 20, 30, 40, and 50.

	Nominal	Units	Low Limit	High Limit	Resolution
t	10...		10.00	10.00	2
t	20...		20.00	20.00	2
t	30...		30.00	30.00	2
t	40...		40.00	40.00	2
t	50...		50.00	50.00	2

- **Example2:** If the Start value is 5 and the End value is 12 with a Step Size of 3, the Nominal values will be 5, 8, and 11.
 - **Unit** – The measurement unit of the nominal values for each test.
 - **Output Start (required)** – The output value for the transducer that corresponds to the Start value.
 - **Output End (required)** – The output value for the transducer that corresponds to the End value.
 - **Output Units** – The measurement unit for the Output values.
- Note:** The Output values are the linear relationship between the input and output. For example, the Start could be 0 PSI, the End could be 100 PSI, the Output Start could be 0 Volts and the Output End could be 5 Volts.
- **% Reading** – Indicates the percentage to use to calculate the specifications for each test as a percentage of each Nominal value.
 - **%FS** – Indicates to use a percentage of full scale to calculate the test specification for each test. Note that the End value is used as the full scale value.
 - **Floor** – Indicates the floor value for specifications. This value is added to the calculated specification for each test.
 - **Resolution (required)** – Indicates the number of decimal places to use to format all values.
 - **PPM** – If checked, the value entered is parts per million (PPM). If unchecked, the value entered is in percentage.
 - **Use the greater of % Reading and %FS errors** – If checked, the greater of % Reading and %FS is applied to the calculated specification value for each test.

Generating Sequences Using the Step Wizards

The Step Wizard and Step Wizard Transducer are used to generate sequences of measurement points for manual calibration.

- **Generating Ascending Points** – To generate a set of ascending points, the Start value should be smaller than the End value.
- **Generating Descending Points** – To generate a set of descending points, the End value should be smaller than the Start value.
- **Step Size** – The step size is always a positive value, indicating the span between the measurement points, regardless of the direction of the sequence defined.
- **Generating Points with one or more Changes of Direction** – To generate a set of points with one or more changes of direction, e.g. a ramp-up, ramp-down sequence, use the step wizard to generate the ramp-up sequence, then use it again to generate the ramp-down sequence, repeating as necessary.
- **Rollback Changes** – The Cancel button allows for rolling back changes. In order to be able to roll back only the latest points generated by the wizard, make sure to save the template before generating the next sequence.
- **Sequences containing Negative Values** – The step wizards support sequences that contain negative values, e.g. Start -100, End 0 will generate an ascending sequence from -100 to 0. Start 100, End -100 will generate a descending sequence from 100 to -100.

Determination of Low Limit and High Limit (using %Reading and/or %FS)

The Low Limit and High Limit values are calculated based on the error determined for each point. The options for defining allowable error values include reading and/or full-scale (FS) error, expressed as a percentage or parts per million (PPM), if the respective PPM check box is checked.

- A Floor value can be specified, which is added to the calculated error.
- Reading and Full-Scale error values are added at each point, unless the Use greater of %Reading and %FS errors option is checked, in which case either reading or FS error is applied, depending on which is greater.

Error value at nominal value 0

The error at a nominal value of 0 is undefined. The following conventions apply for 0 nominal values:

- For a Full-Scale value of 0, the span error is used instead of Full-Scale error. For example, for a sequence from -100 to 0, a 1% FS error is determined to be 1, based on 1% of the span between -100 and 0.
- The Reading Error for a measurement point at 0 defaults to 0.
- The author of the template is expected to adjust Low Limit and High Limit values for 0 nominal values, depending on the specific requirements.

Using Manual Templates

To use a Manual Template, the template must be associated with a Procedure and the Procedure must be associated with a Type.

To associate a Manual Template with a Procedure, use the Maintenance menu Procedures option. An existing Procedure can be opened by selecting the Procedure from the Find Procedure screen or a new Procedure can be created by selecting the Cancel button on the Find Procedure screen that is displayed after selecting the Procedures menu option from the Maintenance menu.

1. Enter a Procedure Name (when creating a new Procedure) and Save the Procedure.
2. To select a Manual Template (that was created using the Manual Template option under the Maintenance menu), use the “...” button next to the Data Sheet field. The Attach Data Sheet screen is displayed. Select the Find screen to see all Manual Templates.

3. Highlight the desired Manual Template and select the OK button.
4. On the Edit Procedure screen, select the Service Type of “Calibration” or “Cal/Repair”.

5. This Procedure must be associated with the Asset Type. If the Type does not have this Procedure associated with it (on the Procedures tab of the Type), you will not be able to ‘run’ the Manual Template. To associate the Manual Template, use the “+” button on the right side of the Procedures tab on the Type screen.

Edit Types - Multifunction Calibrator

Find Copy Add Delete Save Cancel Close

☒ Active

Description: Multifunction Calibrator

Asset Count: 1

Item Cost: 0.00

Replace Cost: 0.00

Manufacturer: Fluke

Model Number: S700A

Category (Type):

Weight:

Weight UOM: lbs

Size:

Stock Number:

Sub Category (Type):

Dimensions:

Class:

Family:

Image:

Authority: Default

Work Area: Electronic

Procedures

Active (TPD)	Number	Procedure Name	Interval	UOM	Service Type (TPD)	Authority	Standar...
<input checked="" type="checkbox"/>		FLUKE 5700: (90 DAY) CAL VER / 7...			Calibration		0.00 0.
<input checked="" type="checkbox"/>		Fluke Vendor Provided			Calibration		0.00 0.
<input checked="" type="checkbox"/>		Manual Template - 5700 Cal	12	Months	Calibration	Default	0.00 0.

Page 1 of 1 Showing 1 - 3 of 3

Once the procedure is associated with the Type, any Asset of this Type will now be able to run the Procedure containing the Manual Template specified in the Procedures tab of the Type screen.

6. Receive the Asset and open the Work Order created from the receiving process.
7. From the Work Order Service tab select the Procedure to use by pressing the “...” button next to Procedure Used text field. Select the Procedure that contains the Manual Template to use.

Edit Work Order - 2021000025

Find Print Unlock Cert Add Result Section Status Batch Get Ambient Return Delete Save Cancel Close

Barcode: 179-III

ID: 179-III

Customer: Customer A

Service Type (WO): Calibration

Status: Complete

Model Number: 8846A

Serial Number: 2-41400871u8

Department: Cal Lab Inc

QC Approved By:

QC Approved Date:

Manufacturer: Fluke

Authority - T: Default

Job Number:

Working Lab: My Lab

Administrative Lab: My Lab

Description: 6-1/2 Digit Precision Multimeter

Contact Info:

WO Results: Pass

Service

Required Date	Priority	Open Date	Service Date	Interval	UOM	Due Date
03/05/2021	3	02/19/2021	09/28/2021	12	Months	09/28/2022

Work Order Number: 2021000025

Certification Number: 2021000025

Default Procedure: Test Types MT

Procedure Used: Test Types MT

Initial Condition:

Temperature: 23

Humidity: 40

Pressure:

Assigned Tech:

Technician: System Administrator

Work Area: Electronic

8. To run the Procedure, either select the “...” button next to the Data Sheet field on the Work Order Service tab or navigate to the Results tab and select the “+” button below the results grid.

Edit Work Order - 2021000025

Find Print Unlock Cert Add Result Section Status Batch Get Ambient Return Delete Save Cancel Close

Barcode 179-III ID 179-III Customer Customer A Service Type (WO) Calibration Status Complete

Model Number 8846A Serial Number 2-41400871u8 Department Cal Lab Inc QC Approved By QC Approved Date

Manufacturer Fluke Authority - T Job Number Working Lab My Lab Administrative Lab My Lab

Description 6-1/2 Digit Precision Multimeter Contact Info WO Results Pass

Service Extended Data Log Notes Labor / Files Standards / Accreditations Notes Parts Sub Contract / Estimate **Results (4)**

Date	Procedure Name	Description	Status	Data Origin	Data Condition	Run At Facility	User Name
01/07/2022 14:49	Test Types MT	Manual Template	Pass	MET/TEAM	As Found	My Lab	Admin
01/07/2022 15:05	Test Types MT	Manual Template	Pass	MET/TEAM	As Left	My Lab	Admin
01/21/2022 17:08	Test Types MT	Manual Template	Pass	MET/TEAM	As Found	My Lab	Admin
01/21/2022 17:38	Test Types MT	Manual Template	Pass	MET/TEAM	As Found	My Lab	Admin

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When the “+” button is selected from the bottom left corner of the Results tab or the “...” button next to the Data Sheet field is selected from the Service tab, the [Manual Template associated with the selected Procedure](#) is displayed waiting for manual calibration data entry.

Note: The behavior of the “+” button on the Results tab can be controlled by the “Work Order – Use Multiple Procedures” System Default.

Work Order – Use Multiple Procedures System Default

This System Default controls the behavior of the “+” button at the bottom of the Work Order Results tab.

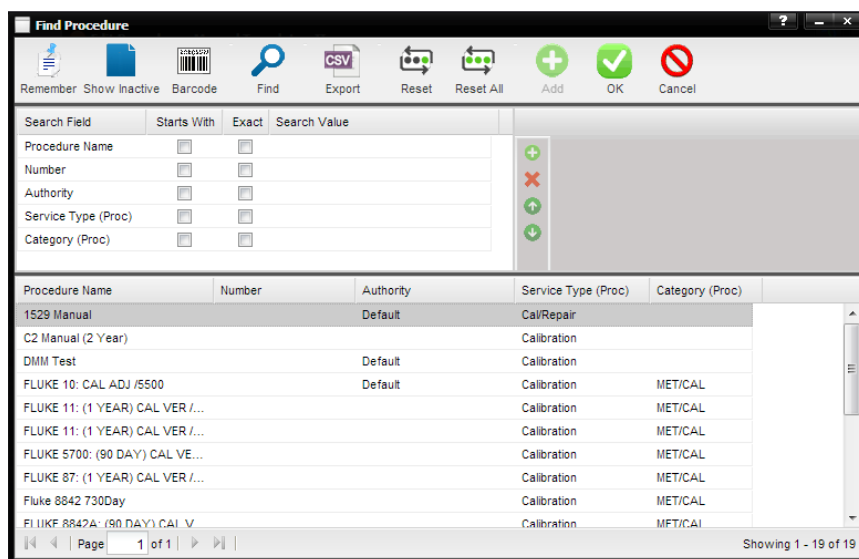
System Defaults

Add Modify Close

Ac...	Property	Value	Order	Authority	Comment
<input type="checkbox"/>	Work Order - Suffix	(none)	0.00	Default	AFFECTS:
<input type="checkbox"/>	Work Order - Use Multiple Procedures	(none)	0.00	Default	AFFECTS:
<input checked="" type="checkbox"/>	Work Order Report	Worksheet_UID.rpt	0.00	Default	AFFECTS:

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- If active, different procedures can be selected and used in the calibration process other than the Procedure specified by the Procedure Used field on the Service Tab of the Work Order. The Find Procedure screen is displayed, for selecting a different Procedure as defined on the Procedure tab of the Type.

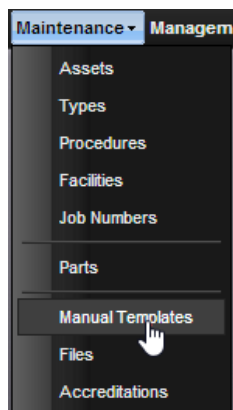


- If inactive, only the Procedure specified by the Procedure Used field on the Service tab can be used in the calibration process. The Value field of this System Default is ignored. The Order field of this System Default is ignored.

Example – Creating a Manual Template

The following example provides step-by-step instructions for creating a Manual Template.



1. Go to Maintenance -> Manual Templates.



2. Select the Add button to add a new Manual Template.
3. Give the Manual Template a new name. For example: **Pressure Gauge**.
4. Add any necessary notes.
5. Select the Template Design tab.
6. Right click anywhere inside the grid and select the Step Wizard option.

Add Row
Copy Row
Remove Row
Update Formula
Delete Formula
Remove All
Resequence Steps
Step Wizard
Step Wizard (Transducer)

7. Fill out the form with the relevant information.

 Save
  Cancel

Start	End	Step Size	Unit
0	500	100	psi
%Reading	%FS	Floor	Resolution
1			1
<input type="checkbox"/> PPM	<input type="checkbox"/> PPM	<input type="checkbox"/> Use the greater of %Reading and %FS errors	

- Enter 0 for the Start value.
- Enter 500 for the End value.
- Enter 100 for the Step Size (each row will increment by 100 units).
- Enter PSI for the Unit of measure.
- Enter 1% for the % Reading.
- Enter 1 digit of resolution.

9. Select the Save button.

10. The Manual Template grid is automatically populated with the relevant rows of data.

Add Manual Template

Find Transducer Copy Add Delete Save Cancel Close

Template **Template Design**

Source	Step #	Description	Label	Row Type	Nominal	Unit	Low Limit	High Limit	Resolution	TUR	Uncertainty
No	1	0.0psi <= x <= 0.0psi	Test 1	Inside Limit	0.0	psi	0.0	0.0	1	4	0.05
No	2	99.0psi <= x <= 101.0psi	Test 2	Inside Limit	100.0	psi	99.0	101.0	1	4	0.05
No	3	198.0psi <= x <= 202.0psi	Test 3	Inside Limit	200.0	psi	198.0	202.0	1	4	0.05
No	4	297.0psi <= x <= 303.0psi	Test 4	Inside Limit	300.0	psi	297.0	303.0	1	4	0.06
No	5	396.0psi <= x <= 404.0psi	Test 5	Inside Limit	400.0	psi	396.0	404.0	1	4	0.07
No	6	495.0psi <= x <= 505.0psi	Test 6	Inside Limit	500.0	psi	495.0	505.0	1	4	0.08

- Fill in the description, label and/or uncertainty for each of the rows by placing the cursor in the appropriate cell.
- Select the Save button at the top of the screen.
- The screen will refresh, and your template is complete!

Manual Template – Calibrate Screen

To enter data on the Manual Template, position your cursor in the DUT (device under test) column on the far right and enter the calibration data for each test. If the data entered exceeds the specifications for that test defined by the template, the cell will turn red.

Calibrate

Instructions Copy Save Cancel Close

Barcode: PRE0000056 Serial Number: 1-12100291r3 Data Condition: As Found Notes:

Source	Step	Description	Label	Row Type	Nominal	Low Limit	High Limit	PRE0000056 (1-12100291...
<input type="checkbox"/>	1	General Tests		Bold Label				
<input type="checkbox"/>	2	Connector - Check threads are OK		Checkbox				
<input type="checkbox"/>	3	Noise	Is fan noisy?	Y = Fail				
<input type="checkbox"/>	4	Open Input Test	Is Reading betw...	Y = Pass				
<input type="checkbox"/>	5			Blank				
<input type="checkbox"/>	6	Performance Tests		Bold Label				
<input type="checkbox"/>	7	Frequency Measure		Inside Limit	12.00 MHz	10.00 MHz	13.20 MHz	13.21
<input type="checkbox"/>	8	Residual Noise		<= Limit	6.50 µV		6.50 µV	6.30
<input type="checkbox"/>	9	Minimum Power		>= Limit	13.50 dBm	13.50 dBm		13.55
<input type="checkbox"/>	10			Blank				
<input type="checkbox"/>	11	Enter case color		Enter Text				
<input type="checkbox"/>	12	Sample Report Label		Report Label				
<input type="checkbox"/>	13	Enter text		Enter Text				

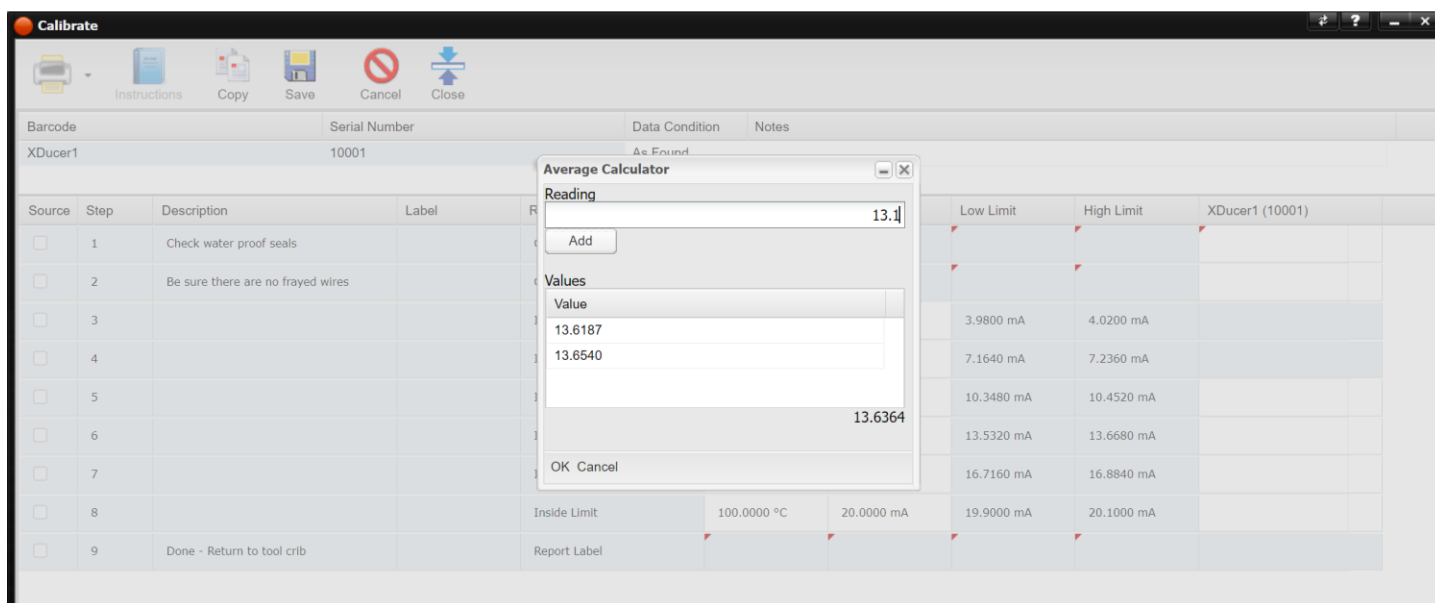
If the Allow Nominal Value Adjustment checkbox was checked for non-transducer templates, the values in the Nominal column are editable. Changing a value in the Nominal column causes the Low Limit and/or High Limit values to be recalculated.

For transducer templates, the values in the Ref Nominal column are always editable. Changing a value in the Ref Nominal column for Row Types Inside Limits (!), <= Limit (!) and >= Limit (!) causes the Low Limit and/or High Limit values to be recalculated. When the Nominal is altered on a Transducer Template Calibration row that has an underlying formula, the Ref Nominal is also recalculated. Likewise for the Nominal, in case the Ref Nominal is altered.

Source	Step	Description	Label	Row Type	Ref Nominal	Nominal	Low Limit	High Limit	XDucer1 (10001)
<input type="checkbox"/>	1	Check water proof seals		Checkbox					
<input type="checkbox"/>	2	Be sure there are no frayed wires		Checkbox					
<input type="checkbox"/>	3			Inside Limit	-25.0000 °C	4.0000 mA	3.9800 mA	4.0200 mA	
<input type="checkbox"/>	4			Inside Limit	0.0000 °C	7.2000 mA	7.1640 mA	7.2360 mA	
<input type="checkbox"/>	5			Inside Limit	25.0000 °C	10.4000 mA	10.3480 mA	10.4520 mA	
<input type="checkbox"/>	6			Inside Limit	50.0000 °C	13.6000 mA	13.5320 mA	13.6680 mA	
<input type="checkbox"/>	7			Inside Limit	75.0000 °C	16.8000 mA	16.7160 mA	16.8840 mA	
<input type="checkbox"/>	8			Inside Limit	100.0000 °C	20.0000 mA	19.9000 mA	20.1000 mA	
<input type="checkbox"/>	9	Done - Return to tool crib		Report Label					

Values in the Nominal column are editable only for Row Types Inside Limits, <= Limit and >= Limit. Changing a value in the Nominal column for these Row Types causes the Low Limit and/or High Limit values to be recalculated.

If you need to enter the average value of multiple DUT readings, right-click in the appropriate cell in the DUT column and select Manage Readings from the popup menu. The Average Calculator window is displayed. Enter readings one at a time in the Value box and click Add to add each reading to the Values grid. The calculated average of the readings entered appears below the Values grid. When all readings have been entered, click the Save button. The average value is written to the DUT Reading cell.



Note: When entering data, avoid using the thousands separator as this may result in an improperly formatted number.

When using the Average Calculator, the measurements entered are stored in the PointReadings table. These entries cannot be edited, only replaced. To replace the values with a new set of values, use the Average Calculator anew. When a single value is entered into the cell instead, the PointReadings values are deleted from the database if the single value entered differs from the calculated average it replaces. When a cell is set to ignore, any PointReadings values are deleted from the database as well.

For the Row Types Checkbox, Y = Pass and Y = Fail, the default value when starting a new calibration is no selection (empty). The overall pass/fail result of the calibration is not affected until a response is selected for the Y = Pass and Y = Fail rows. The response to a Checkbox row never affects the overall pass/fail result.

The Print button provides the option to print a Crystal Report or to create a .CSV file. The Crystal Report prints one DUT Reading column. The .CSV file contains multiple DUT Readings as determined by the template.

The Copy button provides the ability to duplicate your data, but only if the 'Data Condition' is marked 'As Found'. This duplicated data will be copied exactly as-is, with the exception of the 'Data Condition' which will be changed to 'As Left' for the new record only. A yellow bordered window is displayed awaiting any changes that need to be made for 'As Left'. Once saved, the resulting record can be seen on the Results tab of the Work Order.

Use the "Manual Template - Default Data Condition" system default to customize the default Data condition.

Note: The Copy button is only enabled if the 'Data Condition' is set to 'As Found', and the record has been saved at least once.

Note: When adding a manual template calibration to a Work Order that already has results, the Data Condition is automatically set to *As Left*.

Skipping a Test

If a specific test cannot be performed, the technician has the option to set the entry to "Ignore", using the right-click context menu.

Calibrate

Instructions Copy Save Cancel Close

Barcode	Serial Number	Data Condition	Notes
XDucer1	10001	As Found	

Source	Step	Description	Label	Row Type	Ref Nominal	Nominal	Low Limit	High Limit	XDucer1 (10001)
<input type="checkbox"/>	1	Check water proof seals		Checkbox					
<input type="checkbox"/>	2	Be sure there are no frayed wires		Checkbox					
<input type="checkbox"/>	3			Inside Limit	-25.0000 °C	4.0000 mA	3.9800 mA	4.0200 mA	
<input type="checkbox"/>	4			Inside Limit	0.0000 °C	7.2000 mA	7.1640 mA	7.2360 mA	
<input type="checkbox"/>	5			Inside Limit	25.0000 °C	10.4000 mA	10.3480 mA	10.4520 mA	
<input type="checkbox"/>	6			Inside Limit	50.0000 °C	13.6000 mA	13.5320 mA	13.6680 mA	
<input type="checkbox"/>	7			Inside Limit	75.0000 °C	16.8000 mA	16.7160 mA	16.8840 mA	
<input type="checkbox"/>	8			Inside Limit	100.0000 °C	20.0000 mA	19.9000 mA	20.1000 mA	
<input type="checkbox"/>	9	Done - Return to tool crib		Report Label					

Row Error: +0.0000
Average Calculator
Ignore

The field becomes disabled and displays in the same color/shading as the other fields that are not editable. To reverse the change, the same right-click menu offers a “Do Not Ignore” option.

10.4520 mA
13.6680 mA
16.8840 mA
20.1000 mA

Row Error: -10012.6000
Average Calculator
Do Not Ignore

Test points set to be ignored are recorded with a Pass/Fail status of “N/A” on the point and do not affect the overall Pass/Fail determination of the work order result.

If the Manual Template Procedure has a Procedure File attached,

Edit Procedure - Test Types MT

Find Unlock Copy Add Delete Save Cancel Close

☒ Active (Proc)

Procedure Name: Test Types MT
Data Sheet: Example - Test Types
Procedure File: Fluke 2020 Cal.pdf

Number:
Version:
Procedure Date:
Authority: Default
Revision:
Revision Date:
Approved By:
Service Type (Proc): Calibration
Category (Proc): MET/TEAM Template

Default Standards | Parts | Referenced Types | Notes | Files | Extended Data

Alternate	Description	Model	Manufacturer	Active	Category (Type)	Sub Category (Type)
-----------	-------------	-------	--------------	--------	-----------------	---------------------

Page 1 of 1
No records to display.

it can be viewed from the Instructions button on the Manual Calibration page.

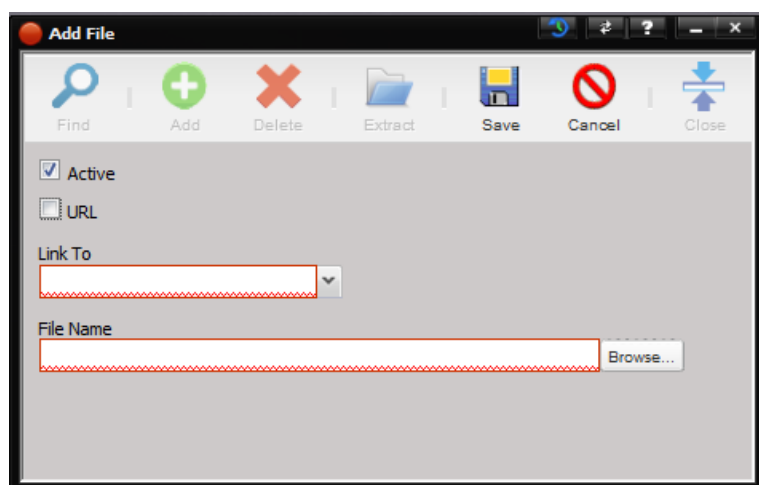
Instructions Copy Save Cancel Close

If the web browser used for MET/TEAM has been set up to automatically download certain file types, like e.g. PDFs, the instruction file may be downloaded to the local hard drive, rather than opened in the web browser. Check your browser's download folder if the file contents are not displayed.

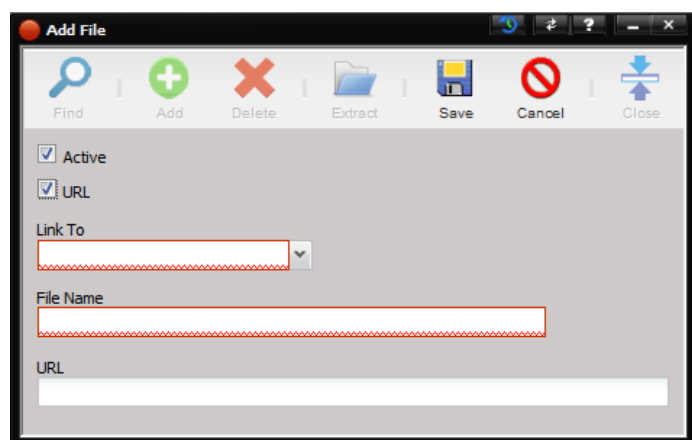
Files

The Files option stores external files in the MET/TEAM database allowing for document management. **By default the maximum size allowed is a 50MB file.** Once stored the user can reference the document within MET/TEAM components (such as Work Orders). These files are stored in the database, removing the need for external file management and security.

MET/TEAM also supports files on network shares as well as on the internet. These files are not stored in the database. They are linked to by the URL field.



- **URL** – If checked, the screen refreshes displaying a text box for entering a URL. Files are now supported that exist on a network share as well as on the internet. **Note: When adding a PXE file for use with MET/CAL, the URL option is not supported! PXE files that are located in a Microsoft SharePoint or other similar system cannot be used by MET/TEAM and MET/CAL at this time.**



- **Active** – Marks the file as active or inactive. If unchecked, the file is inactive and is not displayed in pick lists within MET/TEAM.
- **Link to (required)** – A dropdown list for selecting where the File is linked.

- Indicates where the File is linked (Facilities, Procedure, Types, etc.) and affects where the File appears in MET/TEAM.
- For example if Procedure is selected from the Link To dropdown, when adding Files to a Procedure (on the Procedure screen) screen, the Find File screen displays Procedure in the Link To Search Field.

Search Field	Starts With	Exact	Search Value
Link To	<input type="checkbox"/>	<input type="checkbox"/>	Procedure
File Name	<input type="checkbox"/>	<input type="checkbox"/>	
URL	<input type="checkbox"/>	<input type="checkbox"/>	

Link To	File Name	URL
MET/CAL Proc...	BillUncZero.pxe	
MET/CAL Proc...	tek_tps2000_4c...	
MET/CAL Proc...	MTM-4064.pxe	
Procedure	Address1.txt	
Procedure	Testing Proced...	
Procedure	2014 Calendar....	
Procedure	744n.mens.inn	

- **File Name (required)** – The name of the File.
 - IF the URL checkbox **is not** checked, select the Browse button which opens the Windows Open dialog for selecting the file. The File Name is the actual name of the File selected by the user.
 - If the URL checkbox **is** checked, the File Name is the user facing identifier. This File Name does not have to be the name of the file but can be.
- **URL** – The URL for this File.
 - Paths starting with the server name "\\servername" or file protocol "file://servername" are supported.
 - Due to security in Firefox and Chrome, links to these types of paths are blocked. In order to support this, it must be handled on the server side. This means the MET/TEAM server must have access to the network share, as well as the appropriate permissions to access files on the network share.
 - Also supported are files on the internet, paths starting with "http://" and "https://" which are accessed directly by the client.
 - The URL field must contain the full path to the file including the name of the file.

The **Extract** button opens the file in its native application (Word, Excel, etc.).

Accreditations

Traceability information, such as NIST numbers are entered here and then referenced by service events, reducing the amount of data entry required. Accreditation information such as A2LA certifications can also be added here and referenced by maintenance events.

- **Active** – Marks the item active or in-active. Inactive items are not selectable by the technician.
- **Number** – The reference number of the accreditation or traceable document.
- **Name** – The name of the accreditation or traceable document.
- **Start Date** – Date the accreditation begins.
 - For a date picker, select the calendar button.
- **End Date** – Date the accreditation expires.
 - For a date picker, select the calendar button.
- **Type** – Type of accreditation or traceability.
- **Category (Accr)** – Category of the accreditation or traceable document.
 - The category can be changed by selecting the “...” button.
- **Sub Category (Accr)** – Sub Category of the accreditation or traceable document.
 - The sub category can be changed by selecting the “...” button.
- **File** – Name of the physical document. This document can be stored in the database and reproduced with other certifications on service events.
 - The file can be changed by selecting the “...” button.
 - The File can be viewed by selecting the Quick Link button.
- **Notes** – Allows the user to enter notes or actual information from the accreditation or traceable document.

Data Cleanup

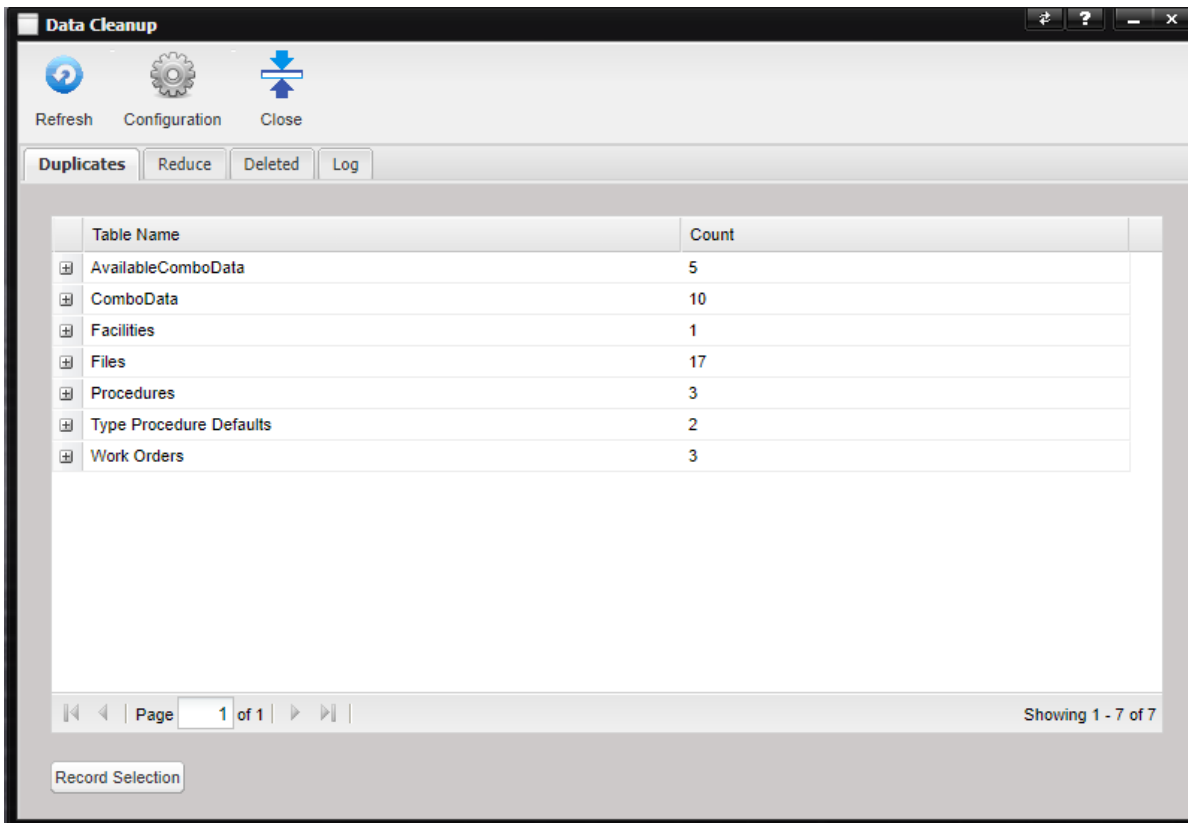
The Data Cleanup Tool serves two purposes, to consolidate records that are considered duplicate and to delete records that have been marked for deletion but have not yet been removed from the database.

Consolidating duplicates involves selecting one record that will be kept and marking the others for deletion once the Process button is selected. The references on the records marked for deletion are updated to the record to keep.

Records marked for deletion contain a non-zero value in the record's IDeleted flag and upon processing, the records are removed from the database. This frees up space in the database.

Note: Access to this tool is restricted to members of the Administrator security group by default. Only one user should access the tool at any given time. Running multiple concurrent sessions in the enterprise will result in unpredictable database changes!

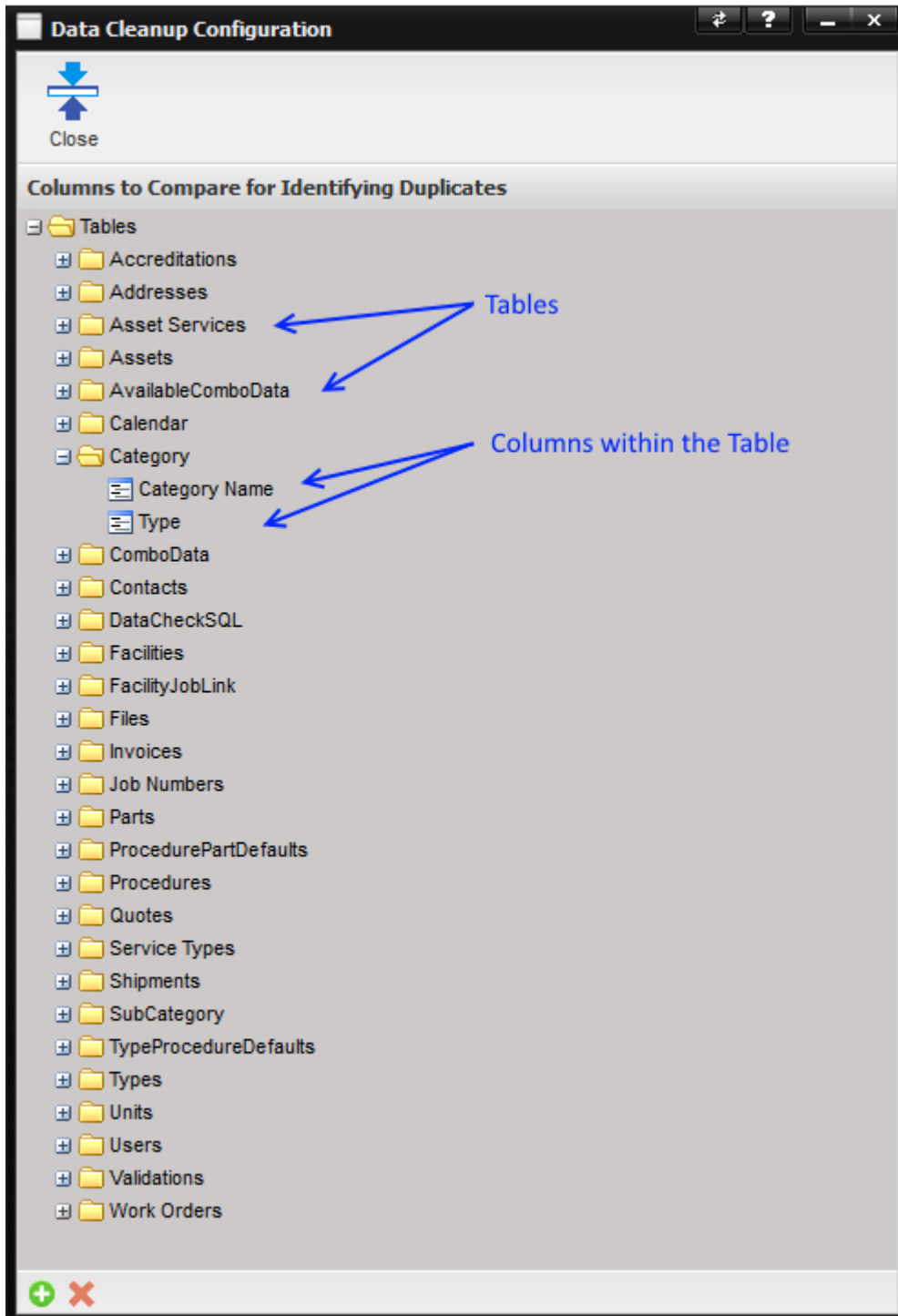
The Data Cleanup Tool toolbar contains a Refresh button which populates the grid on the selected tab and a Configuration button which displays the Data Cleanup Configuration screen.



Configuration Button

The Configuration button opens the Data Cleanup Configuration screen which allows for selecting columns from every configurable table. Use this screen to define how a unique record is identified for a specific table.

Configurations set up here are set up initially and are rarely changed. These configurations reflect the business logic of the enterprise. The order in which the columns are added has no impact on the identification of a duplicate.

**Example:**

If the columns *Category Name* and *Type* are selected for the *Category* table, any records in the *Category* table that have identical values for *cDescription* and *cType* are considered duplicates.

Default Configuration

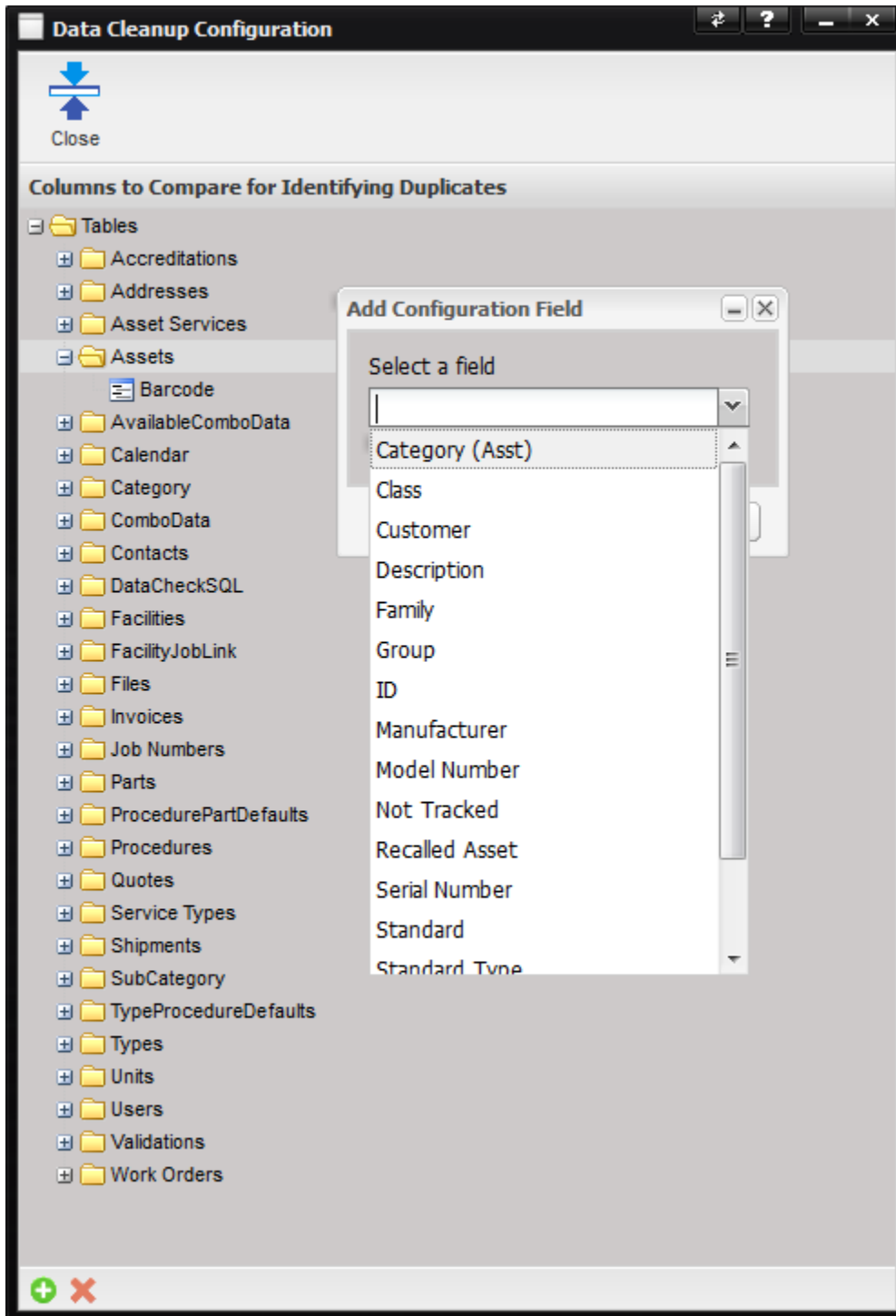
The following table shows the default configuration for a new MET/TEAM installation. Each table is listed with the configured columns and order of the columns.

Table	Column	Order
Accreditations	Name	1
Addresses	Facility Name	1
Addresses	Type	2
Addresses	Address 1	3
Addresses	City	4
Addresses	Country	5
Asset Services	Barcode	1
Asset Services	Service Type	2
Asset Services	Service Mode	3
Assets	Barcode	1
AvailableComboData	Text	1
Calendar	Task Subject	1
Calendar	Task Due Date	2
Category	Category Name	1
Category	Type	2
ComboData	Text	1
ComboData	Model	2
ComboData	Field	3
Contacts	Contact Id	1
DataCheckSQL	Affected Page	1
DataCheckSQL	Data Check Name	2
DataCheckSQL	Function Name	3
Facilities	Facility Name	1
FacilityJobLink	Facility Name	1
FacilityJobLink	Job Number	2
Files	File Name	1
Files	Link To	2
Invoices	Invoice Number	1
JobNumbers	Job Number	1
Parts	Part Number	1
ProcedurePartDefaults	Procedure Name	1
ProcedurePartDefaults	Part Number	2
Procedures	Procedure Name	1
Quotes	Quote Number	1
ServiceTypes	Service Type	1
ServiceTypes	Service Mode	2

Table	Column	Order
Shipments	Shipment Name	1
SubCategory	Sub Category Name	1
SubCategory	Category Name	2
SubCategory	Type	3
TypeProcedureDefaults	Description	1
TypeProcedureDefaults	Model Number	2
TypeProcedureDefaults	Manufacturer	3
TypeProcedureDefaults	Procedure Name	4
Types	Description	1
Types	Model Number	2
Types	Manufacturer	3
Units	Unit Symbol	1
Units	Code	2
Units	Conversion Factor Exponent	3
Users	User Name	1
Validations	Affected Page	1
Validations	Data Check Name	2
Work Orders	Barcode	1

The default configuration supplied with a new installation of MET/TEAM may be sufficient for most use cases.

To add another column to table, highlight the table in the tree and select the “+” button at the bottom of the screen. The Add Configuration Field dialog is displayed. Select a field from the drop down list and push Save.



To remove a column from a table, highlight the table in the tree and select the “x” button at the bottom of the screen.

Note: The same configuration entered here applies to the MET/TEAM Import Tool. Therefore, the same logic applies when determining if a record imported already exists in the database as when cleaning up duplicates. The Import covers tables that cannot be cleaned up by themselves, e.g. Points and related tables, so there is a separate configuration screen for the Import Tool, which includes the data presented here, as well as tables specific to Import only. When a

change is made to the configuration, the data shown on the grid of the Duplicates tab will be outdated and must be refreshed.

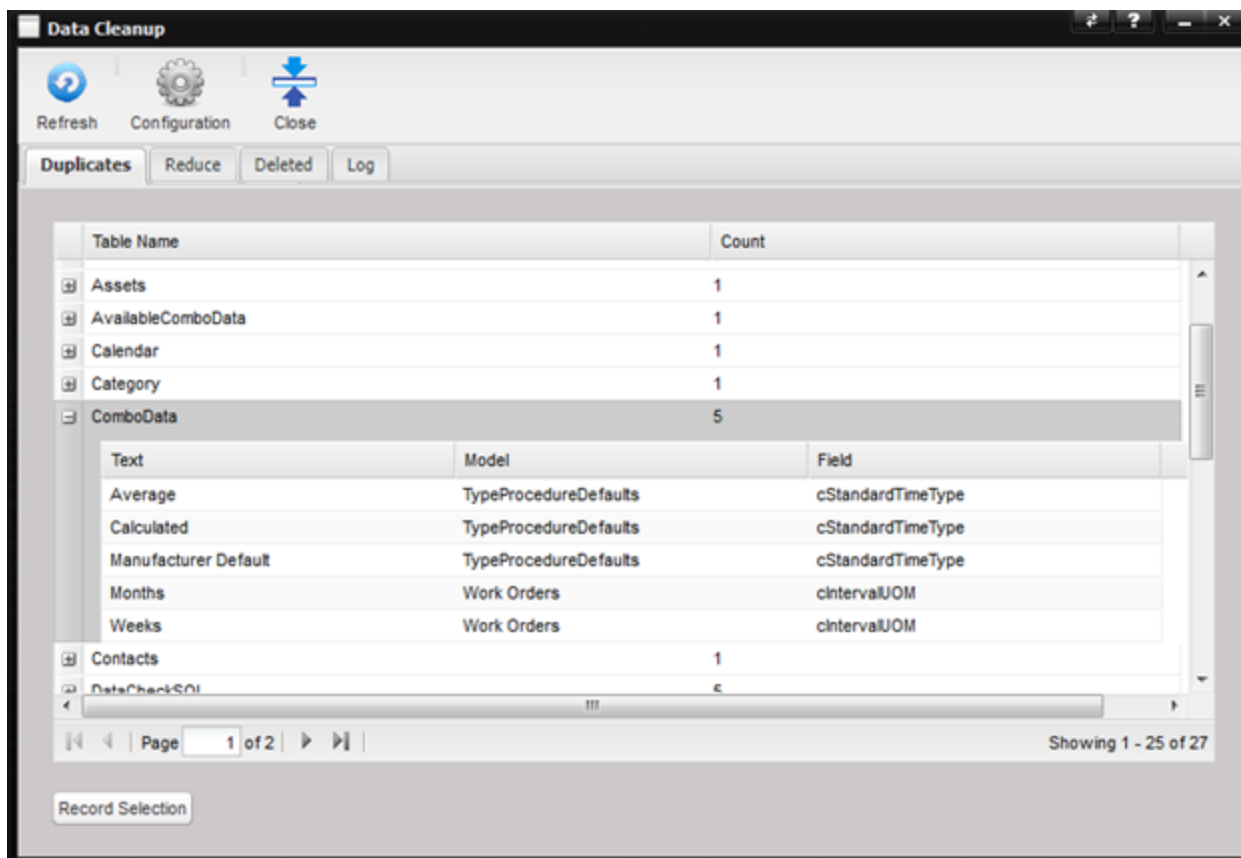
Data Cleanup Tool Tabs

The Data Cleanup Tool is used for cleaning up data that may be duplicated or marked for deletion. The Data Cleanup Tool consists of three tabs:

- Tab for processing duplicate records
- Tab for deleting LicenseUsageHistory records
- Tab for removing records flagged for deletion
- Tab for accessing the logs of past cleanups.

Data Clean up - Duplicates Tab

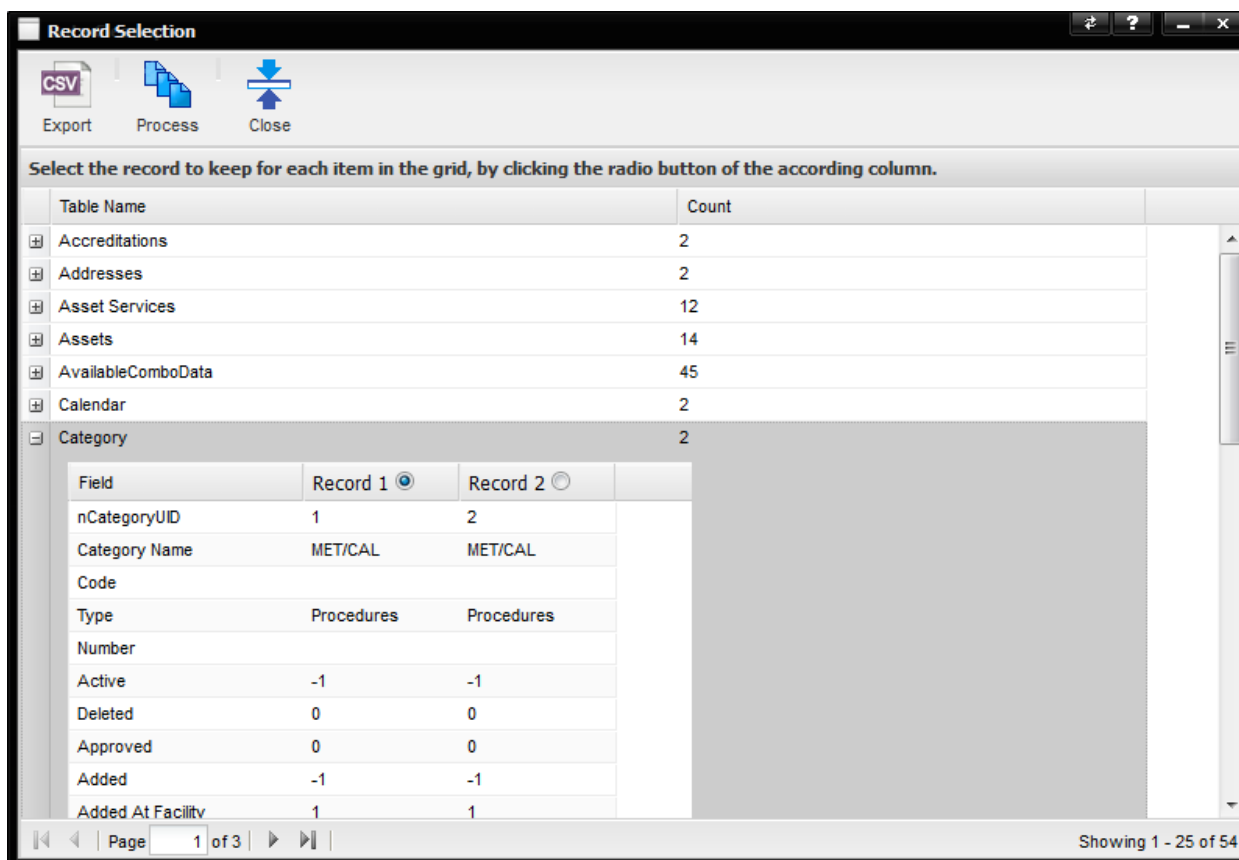
The Duplicates tab is for processing duplicate records. Press the Refresh button to view a list of all records considered to be duplicates in the database.



The grid contains the Table Name and a Count of the conflicts. By pressing the “+” button next to the Table Name record, the record expands and the individual conflicts are displayed.

Record Selection

The Record Selection button on the Duplicates tab displays the Record Selection screen. This screen lists the duplicates found in all tables in the database. These duplicates are based on the configuration defined.



To process one or more duplicates, expand a Table Name and select the record to keep. The records are presented in a pivot view, i.e. each column represents one record in the database. In order to determine which record is the valid one, compare the data between the records (columns) and click the radio button of the record to keep. When a duplicate is marked for deletion, other records in the database that reference that record are updated to reference the record to keep instead.

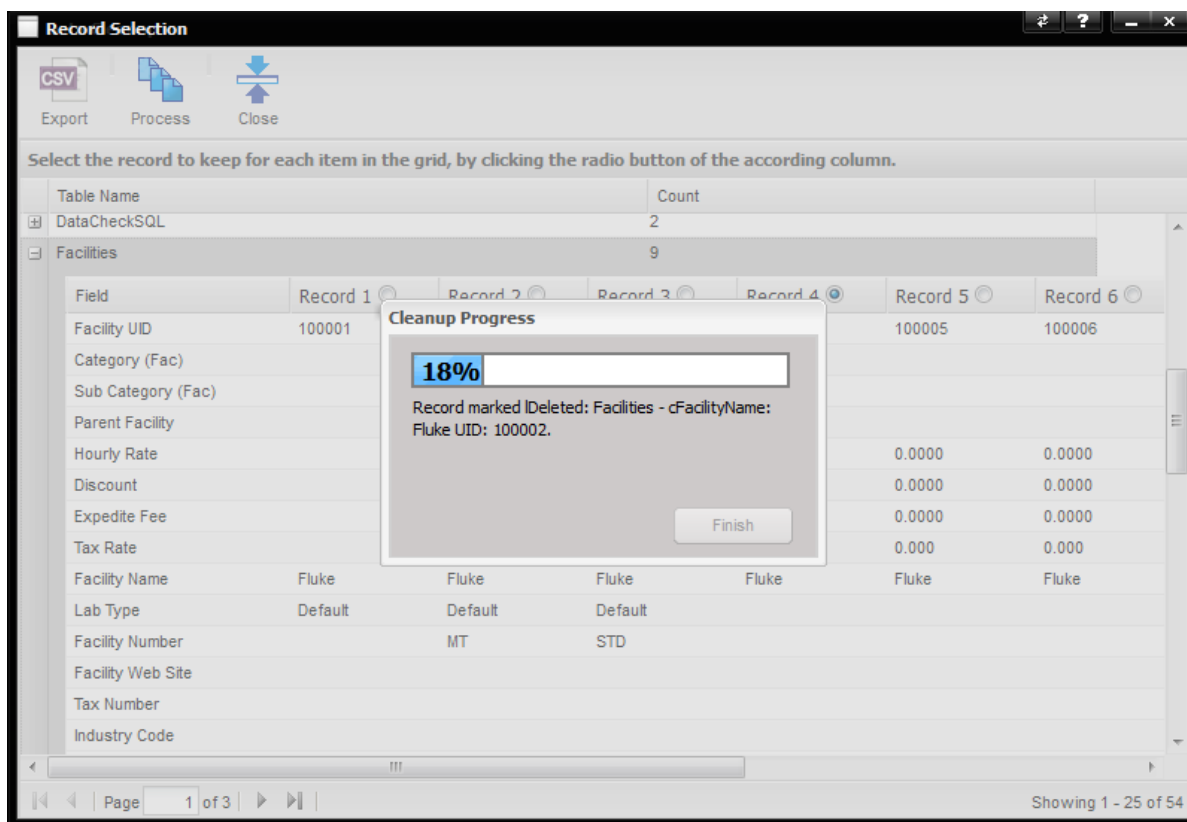
Example:

When a Facility designated as a manufacturer is processed as a duplicate, Types and Assets that reference that Facility will be updated to instead reference the Facility that was selected to be kept. Therefore, removing a duplicate does not interfere with the referential integrity of the data as the Type and Asset will now reference the selected one that is not removed.

However, the FacilityEX record of the Facility removed is also removed, because moving it to the Facility that is kept would result in more than one EX record for the same Facility, which is not supported.

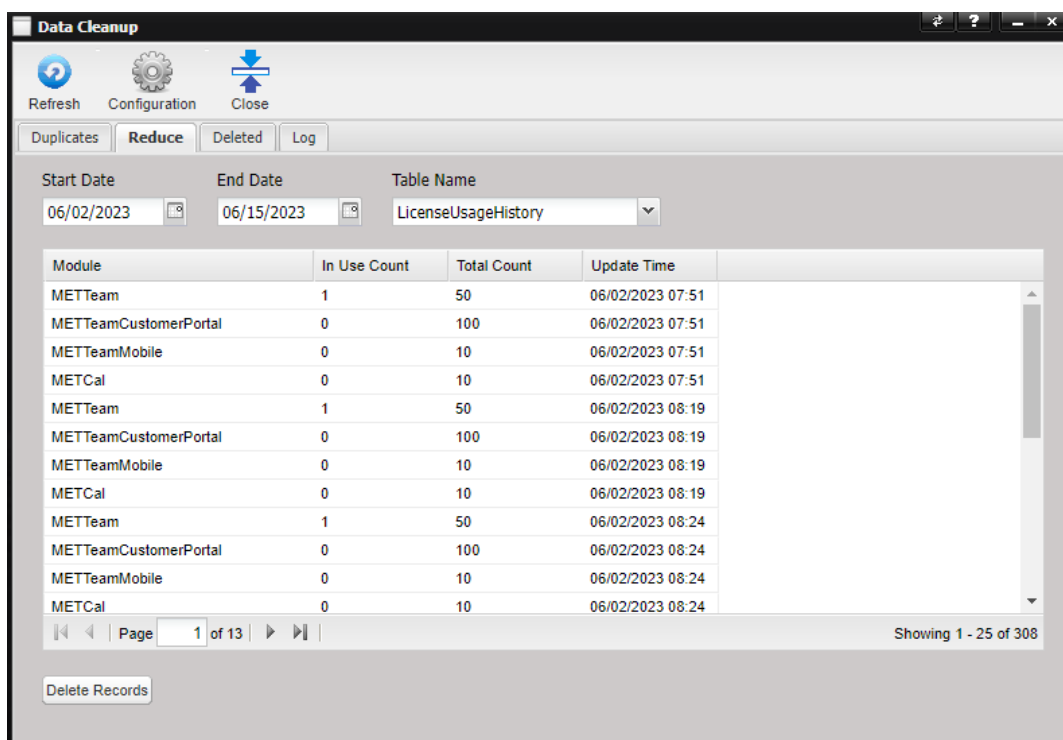
Once one or more records are selected, the Process button is enabled. Selecting the Process button, will process all table entries for which a selection has been made, the others are ignored and can be processed later. When the Process button is selected, a progress indicator is shown. Once the process is complete, the Record Selection screen closes and the grid is refreshed, to show the remaining items.

Note: The progress indicator may appear to be stuck at 0% when it is actually working. Allow it to continue to finish.



Data Cleanup - Reduce Tab

The Reduce tab is for deleting records stored in a specific table. Press the Refresh button to view the records from the table between the Start Date and End Date entered.



Start Date & End Date – All records where the update time is from the start date through the end date. The Start Date defaults to January 1, 1900 and the End Date defaults to today's date.

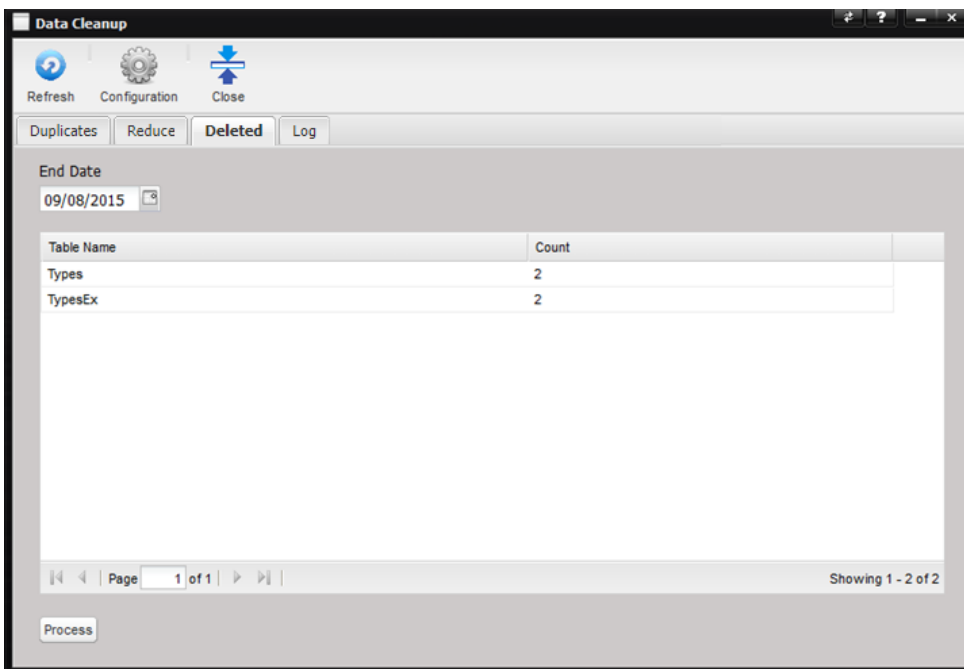
Table Name – Name of the table to read records from.

Grid – The grid contains the Module name, In Use Count, Total Count and Update time for each license usage record saved in the database.

Deleted Records – The Delete Records button will attempt to delete all records shown in the grid from the database.

Data Cleanup - Deleted Tab

The Deleted tab is for removing records flagged for deletion. Press the Refresh button to see the records that have not been updated after the End Date entered.



- **End Date** – Records will be displayed that have been marked for deletion and have been updated prior to and including the end date entered. Defaults to today's date.

Table Name	Count
Facilities	1
Facilities	2

Note: Two rows may be shown for Assets and Facilities. The first entry reflects those that do have a parent record, the second those that do not. For the total Assets or Facilities marked for deletion add the counts of both rows together.

The grid contains Table Name and a count of the number of records marked for deletion in each table.

Processing of Data – Deleted

To filter the removal to records older than a specific date, enter that specific date in the End Date field. The data is a filter based on the tUpdateTime of the records marked for deletion.

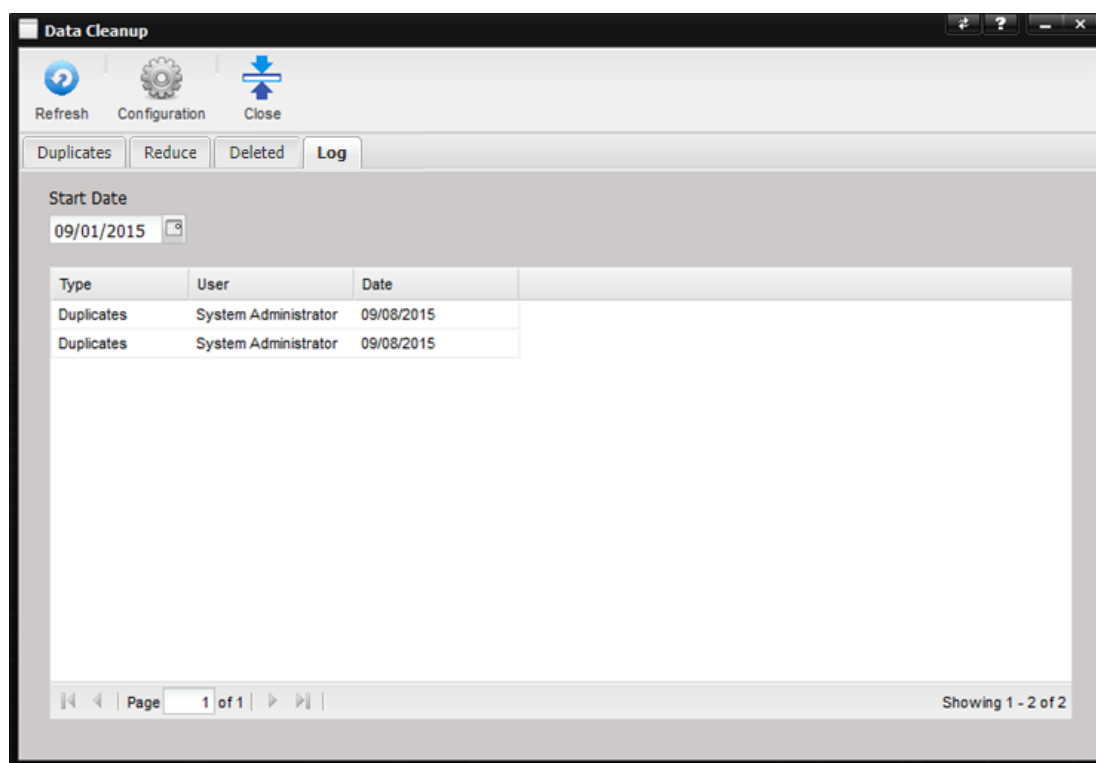
To process records marked for deletion, press the Process button at the bottom left of the screen. The progress is shown similar to the processing of duplicates. When processing is complete, the screen closes. Some records may not be removed, due to dependencies on other records that are newer, and therefore past the End Date entered.

Example:

If an Asset marked for deletion hasn't been updated since the End Date entered, but newer Work Orders exist for this Asset, the Asset cannot be removed. At a later time, once the Work Orders fall within the End Date, they will appear in the grid as well and now the Asset (and Work Orders) can be deleted.

Data Cleanup - Log Tab

The Log tab contains a list of logs from previous cleanups performed since the Start Date entered.



- **Start Date** – The date from which to list the log entries. Defaults to 1 week from today (to show the most recent week of cleanups).

The grid contains the Type (Duplicate or Deleted), User (who performed the action), and the Date the action was performed.

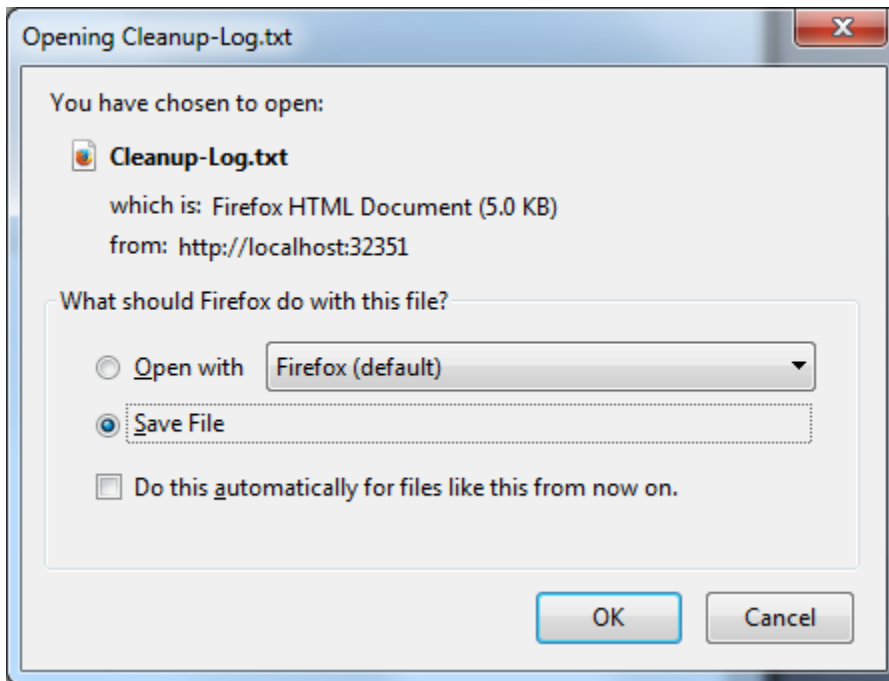
More data can be retrieved, by setting the Start Date back further and pressing Refresh.

Reviewing the Logs of Past Cleanups

To view the log of a past cleanup, double-click the desired record; the log will be downloaded as a file in the web browser and stored in the download location set up in the web browser's settings. From there it can be viewed with the text viewer set up in Windows – usually by double-clicking the file in the download history.

The log shows a detailed list of the items updated. The fields listed for each type of record are those defined in the Configuration screen for the according table, e.g. for a Category record, it shows Category Name (Category.cDescription) and Type (Category.cType) by default. For tables updated that are not configurable, a hard-coded list of fields is

retrieved. E.g. for a record from the Asset Ex table, the fields configured for Assets are displayed, plus the first character field in the ex table, i.e. cField1.



Management Menu

The Management Menu is used for managing the servicing facility. The menu items are: Business Status, Billing, Problem Reports, Tech Assignment, Quote, Contract Pricing, and Calendar.

Business Status

Business Status allows managers to view work in progress, and look at past work. Business Status is designed to give the manager enough information to quickly identify areas of concern, to plan budgets and workload, as well as show process bottlenecks.

Business Status

Print

Refresh

Close

Customer

...

...

Department

...

...

Area

...

...

Include Children

...

...

Description

...

...

Working Facility

Fluke - AMF_

...

Open Work Orders

Closed Work

Total Open

21

Work Order Types

Service Type (WO)	Open
Calibration	21

Showing 1 - 1 of 1

Work In Progress

Status	Items
Complete	1
In Work	1
Received	19

Showing 1 - 3 of 3

The business status screen can be filtered by Asset Customer, Department, Area, Description Type, and Working Facility (in multiple facility data stores, by one or all facilities). When filtered for one Customer, the “Include Children” check box provides the option of including data for the Customer’s related children facilities.

Note: These filters are additive in function and are applied in addition to the date filters.

To update the data on the screen, click the Refresh button.

Business Status - Open Work Orders Tab

The Open Work Orders tab displays the work in progress in the service facility.

Open Work Orders | Closed Work

Total Open: 21

Work Order Types

Service Type (WO)	Open
Calibration	21

Page 1 of 1 | Showing 1 - 1 of 1

Work In Progress

Status	Items
Complete	1
In Work	1
Received	19

Page 1 of 1 | Showing 1 - 3 of 3

Total Open – Total number of open Work Orders in the Service Facility.

Work Order Types (grid) - Displays the types of service currently being performed and the number of each type open in the Service Facility.

Work in Progress (grid) - Displays the open Work Orders by status and the number of Work Orders in each status.

- To view a list of the Work Orders, select the “+” by the Status type.

Work In Progress

Status	Items
Complete	1
In Work	1
Received	19

WO Open...	Date Requested	Customer	Asset ID	Model Number	Asset Description
12/04/2013	12/18/2013	Deb's Customer12	Deb31	1594A	Thermometer Readout
12/11/2013	12/25/2013	Fluke - AMF_	Kenny01	1529	Kenny's Type (Asset)
12/11/2013	12/25/2013	MT	Josh - Space Sh...	STN-1701A	Starship Navigation

Page 1 of 1 | Showing 1 - 3 of 3

- To view a specific Work Order, highlight the Work Order in the grid and double click.

Business Status - Closed Work Tab

The Closed Work tab displays the number and cost of Work Orders closed for each customer for a date range.

Business Status

Print Refresh Close

Owning Lab: Fluke - American Fork Cal Lab
☒ Include Children

Department:
 Type:
 Area:
 Working Facility: MT

Open Work Orders Closed Work

Total Open: 1

Work Order Types

Service Type (WO)	Open
Calibration	1

Page 1 of 1 Showing 1 - 1 of 1

Work In Progress

Status	Items
Received	1

Open Date	Date Requested	Customer	ID	Model Number	Description
09/20/2016	10/04/2016	Fluke - American Fork Cal Lab	PRE0000015	6109A	Bath, Tri-Clamp

Page 1 of 1 Showing 1 - 1 of 1

Select the “+” next to the customer to display the Work Orders closed for that customer.

Closed Work Orders

Start Date: 01/01/2014 End Date: 05/07/2014

Customer	Work Orders	Cost
cal-1	1	150
Deb's Customer12	1	250
Fluke - AMF Lab	2	562.5
WO Open...	Closed Date	Asset ID
01/03/2014	01/03/2014	PRE0000284
01/08/2014	01/08/2014	PRE0000289
Fluke - AMF_	2	11.84
Kenny Facility	4	2113.68

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Double clicking a Work Order in the grid displays the Work Order. To view the invoice for a closed Work Order, select the Extended Data tab on the Work Order and then the Quick Link button to view the invoice or the print button to print the invoice.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (0)
Closed Date 01/03/2014	Invoice Number 2014003END							
Cost 312.50	Returned By John Doe							
Category (WO)	Returned Date 01/03/2014							
Sub Category (WO)	Returned To							
Quantity 1								

Property	Value
TUR Limit (C2315)	
OOT Limit (C2317)	
Tolerance Referenc...	
Pass 100 (C2319)	No
Revision (C2321)	
Out of Cal Standard...	No
Marginal Tests (C23...	
Notify User Tests (C...	
Failed Tests (C2352)	
Adjustment Tests (C...	
Procedure End Time...	

Billing

Billing is the process of creating Invoices and Invoice line items for selected Work Orders, Parts, and Labor.

Find

Adjust

Refresh

Print

Add

Delete

Save

Cancel

Close

Line Items

Line Item Details

Item Description	ID	Amount	Qty	Ext Price	Taxable
W.O. Number: 201401test Thermometer Readout	PRE0000284	312.50	1.00	312.50	<input checked="" type="checkbox"/>

Work Orders

Parts

Labor

Page 1 of 1

Showing 1 - 1 of 1

Invoice Info

Ship To

Invoice Number
2014003END

Discount
0.00

Total
312.50

Notes

Bill To
Fluke - AMF Lab

Invoice Date
01/03/2014

Sub Total
312.50

Amount Paid
0.00

Status

Shipping/Handling
0.00

Tax
0.00

Balance
312.50

Account Type
Net 10

Other Charges
0.00

VATAmount
0.00

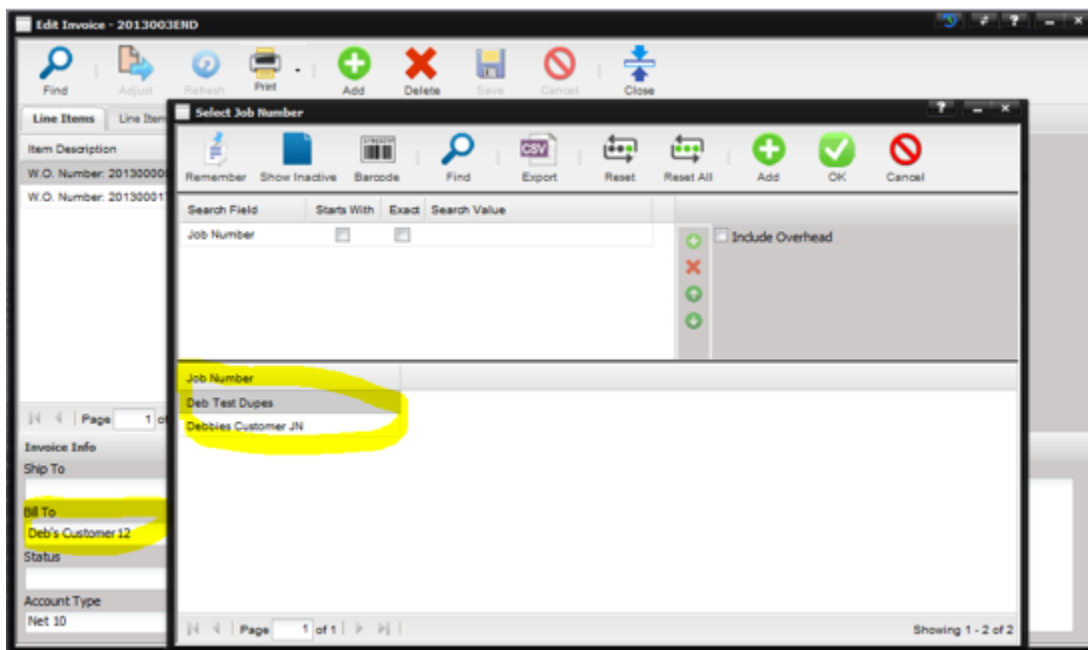
Job Number
Fluke - AMF - 0011

Note: Additional details about each item can be displayed by activating the System Default “Billing - Create Detail” When this System Default is active, the Line Item Details tab is enabled.

Invoice Info

- **Ship To** – The Facility the items are shipped to.
 - The Ship To Facility can be changed by selecting the “...” button.
 - The Ship To Facility can be viewed by selecting the Quick Link button.
- **Bill To (required)** – When a Work Order is added, Bill To is auto filled with the current Asset Customer.
 - If another customer needs to be billed for the work, select the “...” button to change the Bill To customer.
 - To view the Bill To customer information, select the Quick Link button.
 - The Bill To information **does not** change if a different Job Number is selected. The user must manually change the Bill To information by using the “...” button.
- **Status** – The status of the Invoice.

- The Status is automatically updated to “Closed” when the Amount Paid and the Total are the same (balance is 0).
- The Status can be changed until the “Closed” is selected.
- **Account Type** – Allows the user to define the kind of account (Net 10, Net 30, COD etc.).
- **Invoice Number** – The unique invoice number as generated by the system based on the System Default values; Invoice – Length, Invoice – Prefix, Invoice – Suffix.
- **Invoice Date** – The date the invoice was generated.
- **Shipping/Handling** – The amount of shipping and handling charges (no tax is applied to this value).
- **Other Charges** – Other charges incurred by the Service Facility which are passed on to the customer.
- **Discount** – A cash amount of discount.
- **Sub Total** – Sub Total of all the items in the invoice.
- **Tax** – The amount of the tax charged.
- **VAT Amount** – Value Added Tax, charged if the system default is active. The system default also controls the amount of the VAT.
- **Total** – The total of the invoice.
- **Amount Paid** – The amount paid on this invoice.
- **Balance** – The amount still owed on this invoice.
- **Job Number** - When a Work Order is added, Job Number is auto filled with the Job Number associated to the current Asset owner.
 - To change the Job Number, select the “...” button. The Select Job Number screen is displayed. When the Find button is selected, the Job Numbers available to select from are filtered to the Job Number owner that matches the customer in the Bill To text box.



- The Job Number **does not** change if a different Bill To is selected. The user must manually change the Job Number by selecting the “...” button.
- **Notes** – Allows the service facility to enter notes that can be printed on the invoice.

Add Work Orders, Part, or Labor to the Invoice

- To add additional Work Orders, Parts, or Labor select the “+” button in the row of buttons labeled Work Orders, Parts, or Labor. Select the entity from the Find dialog.
- To remove a Work Orders, Part, or Labor from the invoice, select the “X” delete button in the row of buttons labeled Work Orders, Parts, or Labor.
- To view a Work Order, Part, or Labor, select the Quick Link button in the row of buttons labeled Work Orders, Parts, or Labor.

Note: Modification of information in the Parts selection screen result in a change to the parts inventory.

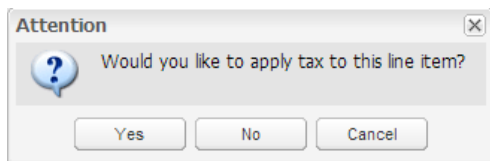
Note: Only non- service labor (from My Work) is added through this process. Labor associated with a service event must be added to the Work Order.

Billing – Line Items Tab

The Line Items tab displays a list of the Work Orders, Parts, and non-service Labor.

Line Items		Line Item Details				
Item Description	ID	Amount	Qty	Ext Price	Taxable	
Labor on - 11/12/2013.		43.87	5.00	219.35	<input checked="" type="checkbox"/>	Work Orders + X Quick Link
Part - PCB 9		25.00	2.00	50.00	<input checked="" type="checkbox"/>	Parts + X Quick Link
W.O. Number: 201401test Thermometer Readout	PRE0000284	312.50	1.00	312.50	<input checked="" type="checkbox"/>	Labor + X Quick Link

- **Item Description** – The description of the Work Order, Part, or Labor.
- **ID** – The Work Order number.
- **Amount** – The unit cost to the customer for this item.
- **Qty** – The quantity being invoiced for this item.
- **Ext Price** – The calculation of Amount * Qty which is the total cost to the customer for this item.
- **Taxable** – Whether or not the line item is taxable.
 - To apply tax to a line item, double click the line item.
 - A prompt is displayed asking the user whether or not to apply tax. The taxable check box displays checked when ‘Yes’ is selected from this prompt.



Billing – Line Item Details Tab

If the System Default ‘Billing - Create Detail’ is active, the Line Item Details tab is enabled for Work Orders. A list of costs associated with the highlighted Work Orders is displayed.

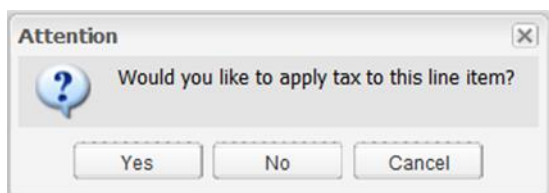
Line Items		Line Item Details		
Description	Cost	Quantity	Extended Amount	
Standard price	250.00	1.00	250.00	
Labor	12.50	5.00	62.50	

- **Description** – The description of the Work Order detail.
- **Cost** – The unit cost to the customer of this detail item.
- **Quantity** – The quantity of this detail item.
- **Extended Amount** – The calculation of Cost * Quantity which is the total cost.

Note: The Invoice Line Item Details tab is only enabled when the System Default 'Billing - Create Detail' is active.

Charging Tax

Inventory items and services have default properties that cause tax to be charged. If tax for the individual line needs to be modified, double click the item in the Invoice Items grid. A prompt is displayed asking if tax is to be applied to this line item.



Select "Yes" to mark this line as taxable. Select "No" to uncheck the taxable check box on this line item. Select "Cancel" to dismiss this prompt.

Adjusting the Invoice

Once the user has selected the desired Work Orders, parts, and labor, select the Adjust button to update the shipping / handling, other charges, discount, and total information on the Invoice.

To view any of the items selected, highlight the item and select the appropriate Modify button. Items on the bottom of the screen in white are modifiable by the user until the invoice is closed.

Problem Reports

The Problem Reports option is used to document and track issues in the Facility that may be incorrect or need improvement. Typically, a problem is reported by a technician for a procedure or a type and the follow-up is done by a manager or QA person.

Edit Problem Report

Find Print Unlock Add Delete Save Cancel Close

Problem Number: 201300000003 Problem Type: Procedure Problem Status: Open Status Date: 11/21/2013 ☒ Active

Information Problem Response Resolution

Work Order: 2013000153

Procedure: Simple Test of 5500A Operation ...

Customer: Facility01

Type: PRT Probe

Manufacturer: FCAL-CPD

Model Number: 5627

Working Facility: MT

Area: Mass

Authority: System

Extended Data

Property	Value

Files

File Name
METTEAM_Matrix.xlsx
Testing Procedures Files tab 2.xlsx

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Problem Number – The tracking number is automatically generated by MET/TEAM using, System Default settings.

- **Problem Type** – The type of problem selectable from the dropdown list: Procedure, Type, Work Order, etc.
- **Problem Status** – The state of the problem report; open or closed.
- **Status Date** – The date the status was updated.
- **Active** – If checked, the problem report is active.

Problem Report – Information Tab

The Information tab contains information pertaining to the Type.

- **Work Order** – Indicates the Work Order the problem report is referencing.
 - When creating a Problem Report, selecting the Work Order will cause the other information to be populated from the Work Order information.
 - The Work Order can be selected by selecting the “...” button.
 - When the Problem Report is being created, the Work Order can be viewed by selecting the Quick Link button.
- **Procedure** – Indicates the procedure the problem report is referencing.
 - The procedure can be selected or changed by selecting the “...” button.
 - The procedure can be viewed by selecting the Quick Link button.
- **Customer** – The customer who owns the type that the problem report is referencing.
 - The customer can be selected by selecting the “...” button.
 - The customer can be viewed by selecting the Quick Link button.
- **Type** – Indicates the Type the problem report is referencing.
 - The type can be selected by selecting the “...” button.
 - The type can be viewed by or modified by selecting the Quick Link button.
- **Manufacturer** – Indicates the Manufacturer from the type the report is referencing.
- **Model Number** – Indicates the Model Number from the type the report is referencing.
- **Working Facility** – Indicates the facility reporting the problem.
 - The working facility can be selected by selecting the “...” button.
 - The working facility can be viewed by selecting the Quick Link button.
- **Area** – Indicates the area of the facility reporting the problem.
- **Authority** – Indicates the authority of the facility reporting the problem.

Problem Report – Problem Tab

The Problem tab is for inserting the problem description in detail.

The screenshot shows the 'Problem' tab of a software interface. On the left, there is a sidebar with the following fields: 'Submitted By' (John Smith), 'Issue Date' (11/20/2013), and 'Category (PR)' (Procedure). The main area on the right contains the text 'The probe will not calibrate.'.

- **Submitted By** – The name of the person completing the problem report.
 - The submitted by can be selected or changed by selecting the “...” button.
 - The submitted by to facility can be viewed by selecting the Quick Link button.
- **Issue Date** – The date the problem report was issued.
- **Category (PR)** – The category of the problem report. To manage the values in the drop-down list, right-click the label above the field and select Edit Combo Data from the popup menu.
- **Notes** – Text identifying the details of the Problem.

Problem Report – Response Tab

The Response tab is for recording results for the problem typically made by the quality personnel or management.

The screenshot shows the 'Response' tab of the software interface. On the left, there is a sidebar with the following fields: 'Response Date' (11/21/2013), 'Reference Number' (R12345), and 'Assigned Engineer'. The main area on the right is empty.

- **Response Date** – The date the response was completed.
- **Reference Number** – The reference identification for the problem.
- **Assigned Engineer** – The person responding to the problem.
- **Notes** – Text identifying the details of the Response.

Problem Report – Resolution Tab

The Resolution tab is for recording the resolution to the problem.

- **Approved By** – The user that approved the resolution for the problem.
 - **Note:** When an approver has been entered, the problem report will be locked upon save.
 - When a problem report is locked, no changes are permitted until it is unlocked via the Unlock button.
- **Approved Date** – The date the result was approved.
 - **Note:** When a problem report is unlocked, the approved date is cleared.
- **Closed Date** – The date the problem report is considered closed or implemented.
- **Submitted** – Indicates the problem report has been submitted. When checked, the only person that can edit the data is the “Approved by” user. Typically, checked when the report investigation begins.
- **Notes** – Text identifying the details of the resolution.

Adding Files

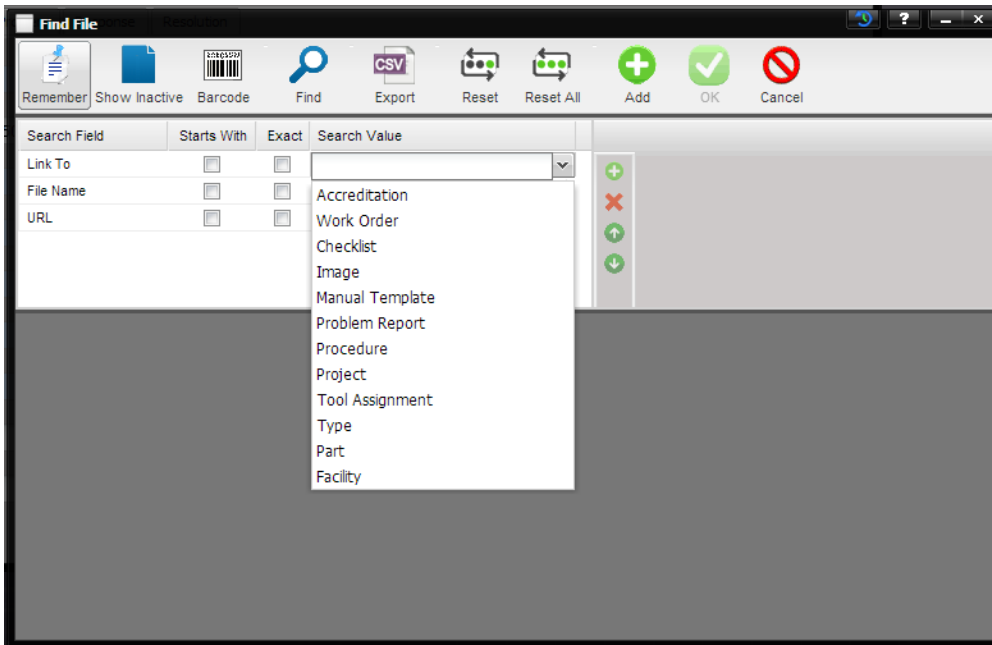
The Files section displays files related the Problem Report. Files may be related either by “Attach File” (attaches an existing file) or by “Upload File” (uploading a new file). The buttons at the bottom of the grid can be used to add, delete, modify, or view files.

Adding a File (Attach or Upload)

When the “+” button on the right is selected, the user is presented with two options: Attach File or Upload File.

Note: MET/TEAM can only upload files that are 50mb or smaller.

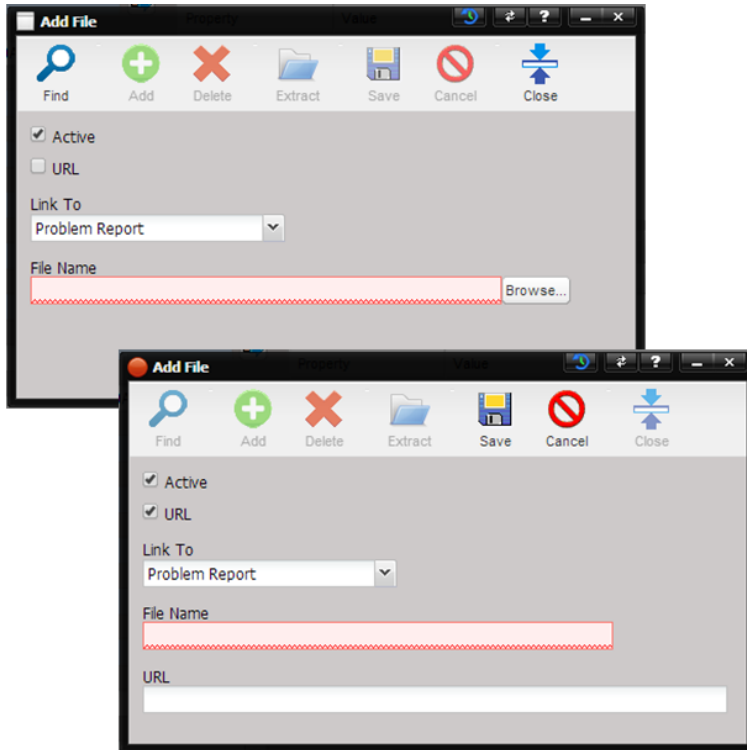
To attach an existing file to a Problem Report, select the Attach File option. The Find screen is displayed for finding the File to add. The Search Value shows the available values for “Link To”. Select Problem Report. Press the Find button. The Files displayed are those files that were previously added using the Maintenance menu Files submenu and created with the Link To set to Problem Report. Select the file to attach from the results grid and press OK.



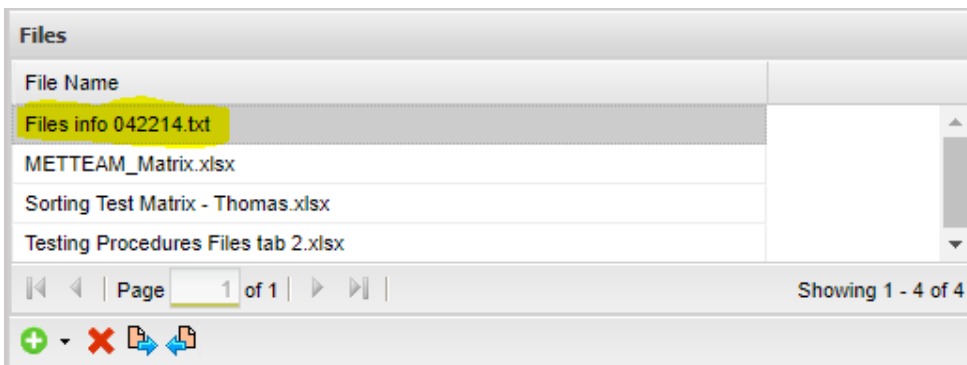
The File you selected is displayed in the Files grid.

To attach a new file to a Problem Report, select the Upload File option. This option adds the File (as if the user had used the Maintenance menu Files submenu) and at the same time attaches the new File to the Problem Report.

The Add File screen is displayed with the Link To prefilled with “Problem Report”. Select the Browse button to select the File to upload.



When the Save button is selected, the new File is saved as a File, the Files screen is closed, the new file is attached to the current Problem Report and the Files grid refreshes on the Problem Report screen.



Deleting a File, Modifying the File Link, Viewing the File

To remove a File, highlight the record in the Files grid and select the “X” button at the bottom of the Files grid.

To modify a File link, highlight the record in the Files grid and select the Quick Link button (the 3rd button) at the bottom of the Files grid.

To view the selected File, highlight the record in the Files grid and select the Quick Link button (the 4th button) at the bottom of the Files grid.

Tech Assignment

Tech Assignment allows managers to assign open Work Orders to technicians. Managers can monitor and manage workloads for their technicians.

Tech Assignment

Close

Assigned Tech

Gracie Olson

Assigned Technician	No.	Hours
Gracie Olson	3.00	10.00
User Fluke5	2.00	0.00

Unassigned Work Orders

Status	Date Opened	Priority	Customer	Work Order Number	Model Number	Description	Barcode
Received	05/19/2015	3	AMF-SW	2015000067	732	DC REFERENCE STD	PRE0000C
Received	05/19/2015	3	AMF-SW	2015000068	732	DC REFERENCE STD	PRE0000C
Received	05/19/2015	3	AMF-SW	2015000069	732	DC REFERENCE STD	PRE0035
Received	07/17/2015	3	My first customer	2015000124	ABC123	Pat's Test Type	PRE0079

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Assigned Work Orders

Status	Date Opened	Priority	Customer	Work Order Number	Model Number	Description	Barcode
Received	05/20/2015	3	My first customer	2015000073	1594A	Thermometer Readout	PRE0063
Received	04/28/2015	3	AMF-SW	2015000032	1594A	Thermometer Readout	PRE30
Complete	06/09/2015	3	My first customer	2015000079	10	DIGITAL MULTIMETER	PRE0066

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Only Work Orders that are assigned to the logged in user's current facility are displayed on the Tech Assign screen. Work Orders are assigned to a facility from the Working Lab field on the Work Order screen. The user's current facility is indicated in the upper right corner of the MET/TEAM™ screen.

Note: Any changes made between the Unassigned Work Orders and Assigned Work Orders are saved immediately.

- **Assigned Tech** – Allows the user to select a technician. When the technician is selected the Assigned Work Orders grid displays the current Work Orders assigned to the selected technician.
 - The Assigned Tech can be selected or changed by selecting the "...” button.
 - The Assigned Tech can be viewed by selecting the Quick Link button.
- **Assigned Technician Grid** – Displays all technicians that have Work Orders assigned to them and the number of Work Orders assigned to them.
 - To view the Work Orders assigned to a technician, highlight the technician in the grid.
 - To assign Work Orders to a technician that does not appear in the grid, select the technician in the "Assigned Tech" box and assign at least one Work Order to that technician.
- **Unassigned Work Orders** – Displays a list of all open Work Orders that have not been assigned.
 - To assign a Work Order, highlight the correct technician and double click the desired Work Order in the grid. The Work Order is moved to the "Assigned Work Orders" grid, showing it has been assigned to the highlighted technician.
 - To save the assignments, select the Save button.
- **Assigned Work Orders** – Displays the Work Orders assigned to the highlighted technician.
 - To un-assign a Work Order, double click the desired Work Order in the grid. The Work Order is moved to the Unassigned Work Orders grid.
 - To save the changes, select the Save button.

Quote

The Quote menu allows a quote to be created for work requested by a customer. The Quote contains a start date, end date, name of person who created the quote (estimator), and allows for tracking who accepted the quote and the date.

Con	Description	Mode...	Amount	Qty	Total
<input type="checkbox"/>	PCB, Board for a 5700		10.05	2.00	20.10

Sub Total	Discount	Total
20.1	0	20.1

Quote Fields

- **Facility** – The Facility the quote is being prepared for.
 - The Facility can be selected or changed by selecting the “...” button.
- **Accepted Date** – The date the customer contact accepted the quote.
- **Accepted** – If checked, the customer has approved this quote.
- **Accepted By** – The customer contact that approved the quote.
- **Account Type** – The customer account type.
- **Work Order** – The Work Order that the quote pertains to.
 - The Work Order can be selected or changed by selecting the “...” button.
- **Est Delivery Days** – The number of days estimated to complete the work quoted.
- **Customer Notes** – Notes pertaining to the customer.
- **Quote Status** – Indicates the progress of the quote.
- **Quote Number** – The number used to identify the quote.
- **Date Created** – The date the estimate was created.
- **Start Date** – The date that the work could begin assuming the quote is accepted before the Expiration Date expires.
- **End Date** – The date the work could be completed assuming the quote is accepted before the Expiration Date expires.
- **Created By** – The User who created the quote.
 - The User can be selected or changed by selecting the “...” button.
- **Expiration Date** – The date the quote expires (must be accepted by the customer).
- **Lab Accepted By** – The User that approved this quote.

- The User can be selected or changed by selecting the “...” button.
- **Lab Accepted Date** – The date the quote was approved by the lab.
- **Lab Notes** – Notes about this quote for the lab.
- **Approved** – If checked, the quote is locked and indicates approval by the lab.
- **Active** – If checked, the quote active or inactive.
- **Sub Total** – The cost before discount.
- **Discount** – The discount for this quote (as a percentage).
- **Total** – The net total for this quote. Calculation = Sub Total – (Sub Total * (Discount/100))
 - **For example:** If the Sub Total = 9 and the Discount = 10, the Total equals 8.10 which is $9 - (9 * (10/100))$.

Adding / Deleting / Modifying Quote Parts or Types

To add Parts or Types, the Quote must first be saved. After saving, the Add Part and Add Type “+” button become enabled. Select either “+” button and the appropriate Find dialog is displayed for selecting the Part or Type.

If a Part is being added to the quote, the Create Quote Item – Part screen is displayed. When the quantity and price are entered, the Total is calculated.

- **Quantity** – The number of Parts used for this quote.
- **Price** – The price the customer is being charged for the Part.
- **Total** – The calculated value of Quantity times the Price.
- **Reference** – The reference for this Part.
- **Notes** – Any notes pertaining to this Part.
- **Description** – The Part description pulled from the information about this Part. See Maintenance Parts menu option.
- **Part Number** – The Part number pulled from the information about this Part. See Maintenance Parts menu option.

- **Manufacturer** - The manufacturer of this Part number pulled from the information about this part. See Maintenance Parts menu option.
- **Stock Number** - The Part stock number pulled from the information about this Part. See Maintenance Parts menu option.

Once the information is complete, select the Save button. The Part is added to the Quote grid.

If a Type is being added to the Quote, the Create Quote Item – Type screen is displayed.

- **Procedure** – The Procedure associated with the selected type.
 - The Procedure can be selected or changed by selecting the “...” button.
 - The Procedure can be viewed by selecting the Quick Link button.
- **Quantity** – The number of Types being quoted.
- **ISOCert** – If checked the ISO Cert cost is included in the Total.
- **In Contract** – If checked, the Type is included in the Contract with this customer.
- **Price** – The price being charged to the customer to perform the Procedure specified for this Type. See the Procedure tab on the Types screen (navigate there by using the Maintenance Types menu option).
- **Total** – The calculated value of Quantity times the Price.
- **Reference** – The reference for this Type.
- **Notes** – Any notes pertaining to this Type.
- **Description** – The Type description pulled from the information about this Type. See Maintenance Types menu option.
- **Model Number** – The Model Number pulled from the information about this Type. See Maintenance Types menu option.
- **Manufacturer** - The Manufacturer of this Type number pulled from the information about this Type. See Maintenance Types menu option.

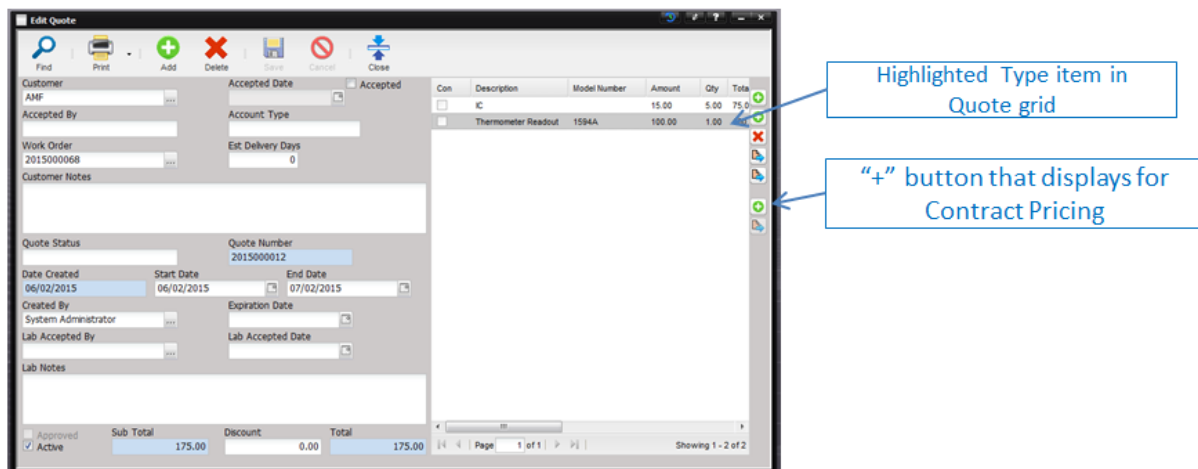
Once the information is complete, select the Save button. The Type is added to the Quote grid.

To delete a Part or Type, select the “X” button after highlighting the item to be deleted in the Quote grid.

To modify a Part or Type, highlight the item in the Quote grid and select the Quick Link button that displays the appropriate tool tip.

Adding / Deleting / Modifying Contract Pricing

To add Contract Pricing to the Quote, highlight the Type item in the Quote grid that the Contract Pricing will apply to and select the “+” button that displays the Contract Pricing tool tip. The Find dialog is displayed for selecting the Contract Pricing.



To modify the Contract Pricing, select the Quick Link button.

Contract Pricing

Contract pricing is used to create custom pricing for facilities that are owners. Select a Customer, a Type/Procedure combination and optionally a Working Facility; enter Effective and Expire dates, contracted price and any notes. Any Work Orders matching the customer and Type/Procedure that are opened between the dates set are charged the contract price instead of the standard price. Expedite or ISO cert fees and any parts on the Work Order can be added to the contract price when calculating the Work Order cost.

Edit Contract Pricing

Find Print Add Delete Save Cancel Close

Customer ☒ Active Working Facility
 Fluke - American Fork Primary L cal-1

Type Procedure Default Manufacturer
 Cal 1595A FLUKE

Description Model Number
 Thermometer Readout 1595A

Effective Date Expire Date Price Std Price
 09/01/2015 03/25/2016 1,500.00 0.00

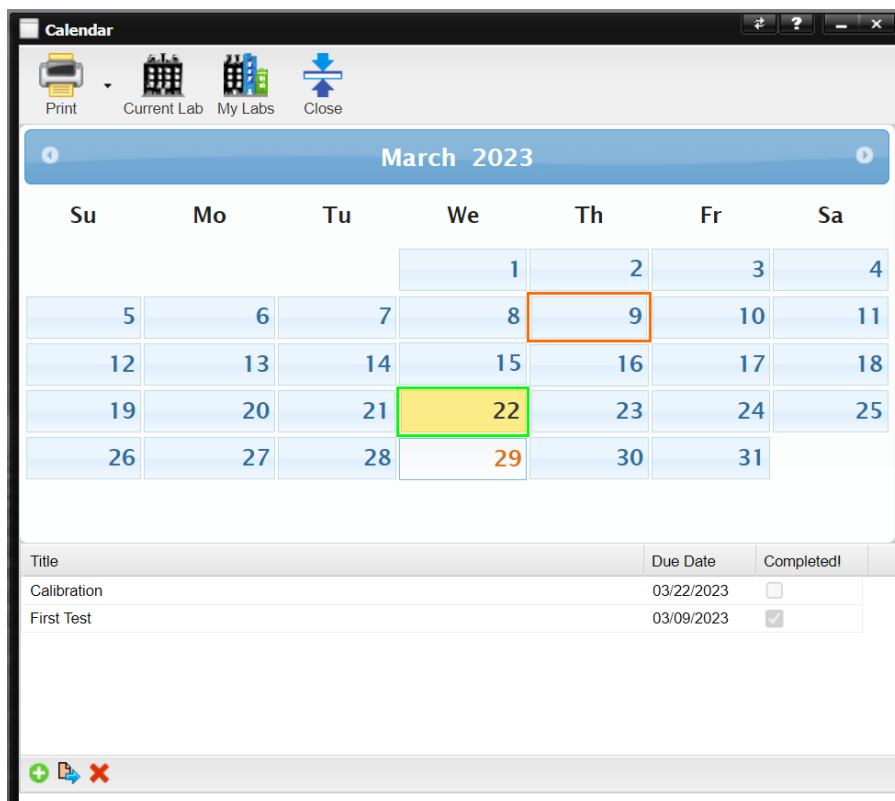
Notes

- **Customer** – The customer that the contract pricing applies to.
- **Active** – Marks the item active or in-active. In-active prices are not used.
- **Working Facility** – Only required if the contract price applies to a specific servicing facility. If blank, the Servicing Facility is not evaluated.
- **Type Procedure Default** – The procedure that the contract pricing applies to.
- **Manufacturer** – The Manufacturer for the type the contract pricing applies to.
- **Description** – The description for the type the contract pricing applies to.
- **Model Number** – The model number for the type the contract pricing applies to.
- **Effective Date** – The date that the contract price becomes effective.
- **Expire Date** – The date that the contract price is no longer in effect.
- **Price** – The new price that applies to the customer and type procedure combination selected.
- **Std Price** – The standard price for the type procedure being adjusted.
- **Notes** - Notes about the contract price.

Calendar

The Calendar provides a place to enter facility wide tasks and appointments. Each day is color coded to describe the type of tasks/appointments associated with the particular day.

- If all tasks for a given day are marked as “Completed”, the block for the given day is highlight in **orange**.
- If there are tasks which are not marked as “Completed”, the block for the given day is highlight in **green**.



To add a task or appointment double click the desired day from the calendar or select the “+” button on the bottom toolbar. The Add Calendar Task dialog is displayed.

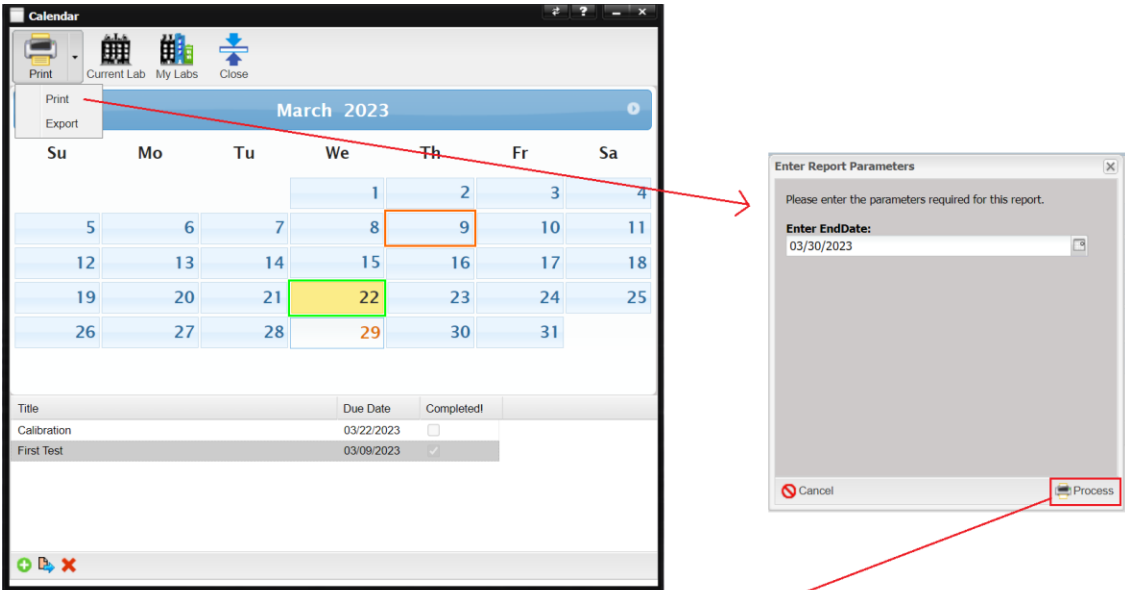
To edit a task or appointment, double click the item in the list or highlight the item in the grid and select the Quick Link button.

To remove a task or appointment, highlight the item in the grid and select the “X” button.

To print the calendar, select the Print button, then in the drop down menu that appears click Print. When the Enter Report Parameter screen is displayed, enter the date through which you want tasks listed. ALL tasks up to this date that are NOT completed are printed (completed tasks are not printed).

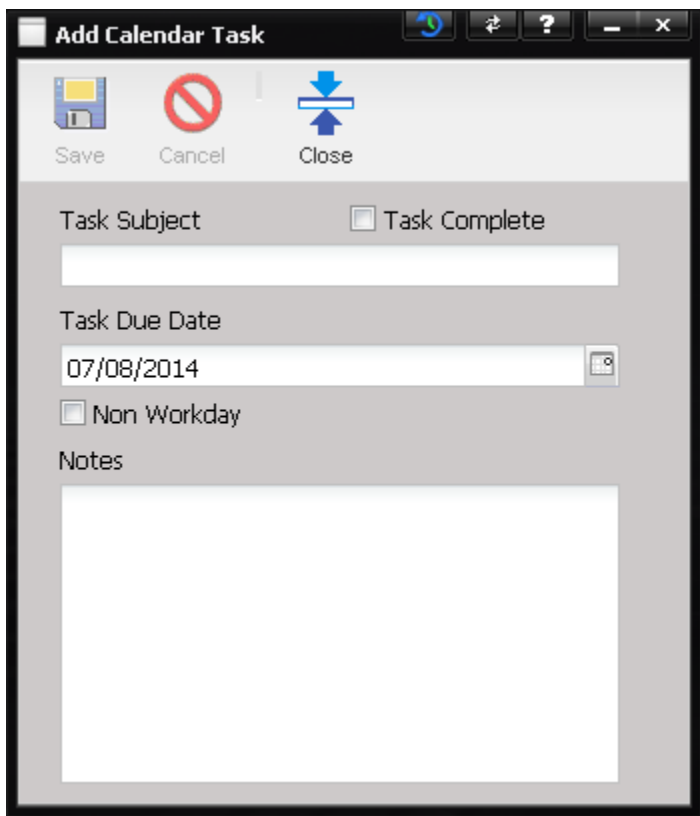
To export the calendar, select the Print button, then in the drop-down menu that appears click Export. When the Enter Report Parameter screen is displayed, enter the date through which you want tasks listed. ALL tasks up to this date that are NOT completed are exported (completed tasks are not exported).

To show tasks that are only related to the currently logged in Lab, click the “Current Lab” button (this button will become depressed). To show tasks that are only related to labs that the current user is associated with, click the “My Labs” button. (Note: the “Current Lab” and “My Labs” buttons are mutually exclusive.) To show tasks related to all Labs, make sure neither “Current Lab” nor “My Labs” is pressed. The choice of which tasks to show related to these two buttons will be remembered on a per user basis.



Calendar			
Tasks Due on or before 3/31/2023	Task Due Date	Task Complete	Notes
Calibration	3/22/2023	No	
Total Tasks: 1			

Adding a New Task
The Add calendar task dialog pops up whenever the “+” button (located below the task grid) is selected. Tasks created are automatically added to the task list for the associated month.



- **Task Subject** – The description of the task.
- **Task Complete** – To mark the task as complete, select this checkbox.
- **Task Due Date** – The date the task is due. If the day the task is due is highlighted in the calendar, it displays the task in the Tasks grid. If the task is past due and is not completed, it continues to display in the Tasks grid.
- **Non Workday** – Select this checkbox to mark the Task Due Date as a day where work will not occur. Non workdays are taken into account when calibration due dates are calculated.
- **Notes** – Any additional information regarding the task.

Reports Menu

The Reports Menu is used for performing reporting tasks. The menu items are: Recall, Batch Cert Printing, and Custom Reports.

All reports are generated in Portable Document Format (PDF), which allows for viewing, printing, emailing or web publishing.

Recall

Recall is used to review and produce customer recall reports, based on a date range which can be narrowed down by customer (owner), physical location and department. An additional filter can be applied to exclude Assets on site or in house.

The screenshot shows the 'Recall' window with the following elements:

- Buttons:** Refresh, Print, Receive, Close.
- Filters:**
 - Start Date: 01/01/1900
 - End Date: 08/11/2016
 - Customer: (empty)
 - Physical Location: (empty)
 - Exclude: No Filter
 - Include Children: ☐ (disabled)
 - All: ☒ (disabled)
 - Do Not Group by Customer: ☐ (disabled)
 - Assigned Facility: ☒ (disabled)
 - Service Facility: ☐ (disabled)
 - Authorizing Facility: ☐ (disabled)
- Print Sort Order:** Due Date, ID
- Grid:**

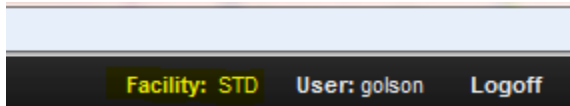
Customer	No....
METTRACK IMPORT	5
My first customer	2
- Page Info:** Page 1 of 1, Showing 1 - 2 of 2

The grid displays the Assets due for maintenance during the specified date range and are grouped by customer in a tree structure. The tree can be expanded by pressing the “+” button and collapsed by pressing the “-” button. To view the Assets in a straight list, check the “Do Not Group By Customer” check box and select the Refresh button. To view an Asset in the list, highlight the Asset in the grid and double click.

- **Start Date** – The starting date of the recall report.
 - For a date picker, select the calendar button.
- **End Date** – The ending date of the recall report.
 - For a date picker, select the calendar button.
- **Sort Order** – Used to determine the order of the data in the grid and on the report.
- **Customer** – Limits the scope to one customer (owner).
 - The Customer can be changed by selecting the “...” button.
- **Include Children**–When checked, all Assets belonging to the selected facility and all children of the selected facility are included. **This is only available when “All” is not selected.**

Example: Let’s say there is a Facility called “Fluke” with children facilities called “Fluke – Service” and “Fluke – Cal Lab”. If this check box is selected and the Customer is “Fluke”, all Assets with the owning Facility of “Fluke”, “Fluke – Service”, and “Fluke – Cal Lab” will be displayed. If this check box is not selected, only the Assets owned by “Fluke” will be displayed. (See the section about the Facility sub menu under the Maintenance menu for details on adding Facilities and children facilities.)
- **All** – If checked, the recall reports include all customers for the designated date range. The Customer selection is disabled. If the System Default, “DepartmentBypass”, is inactive, the Department selection is disabled.
- **Department** – Allows the user to select a department. Based upon a System Default, “DepartmentBypass”, this information represents one of two elements.
 - If the System Default is inactive, the department must be a child facility of the Customer.
 - If the System Default is active, the Department does not have to be a child facility of the Customer.

- The inactive state is most commonly used to assign Assets to facilities that belong to an Asset pool or tool crib. The department would then indicate the facility that currently has possession of the Asset so the recall notice would go to the correct facility.
- The department can be changed by selecting the “...” button.
- **Physical Location** – Used to filter for a specific location or leave blank for all.
- **Do Not Group by Customer** – If checked, the data is displayed without grouping by Customer. If checked, the System Default “Recall – No Group” determines the report used.
- **Assigned Facility** – If checked (default state), only Assets with an Assigned Facility that matches the user’s logged in facility will be included in the Recall list. The user’s logged in facility is displayed in the top right of the MET/TEAM page.



- **Service Facility** – If checked, only Assets with a Service Facility that matches the user’s logged in facility will be included in the Recall list. The user’s logged in facility is displayed in the top right of the MET/TEAM page.
- **Authorizing Facility** – If checked, only Assets with an Authorizing Facility that matches the user’s logged in facility will be included in the Recall list. The user’s logged in facility is displayed in the top right of the MET/TEAM page.
- **Exclude** – Used to filter as desired for “On Site” or “In House” items. Leave blank and all items are included.

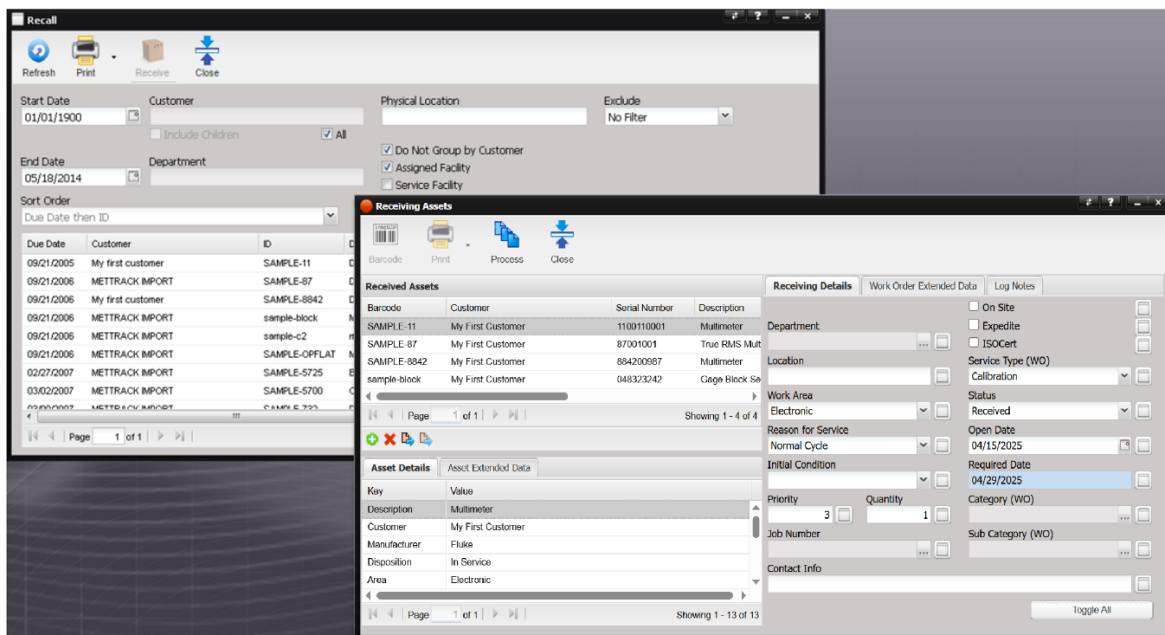
Note: The Assets returned when the Assigned Facility, Service Facility, and Authorizing Facility are checked must match one or more of the check box options. The results are **not** exclusive.

Note: The labels of these check boxes match the headings for the according facilities on the Asset page.

Note: The facility check boxes can be customized via the context menu.

Receiving Assets – Recall Screen

To receive the Assets identified as due for recall, refresh the grid with the “Do Not Group by Customer” check box checked and press the Receive button. The Receiving screen opens with the assets listed here.

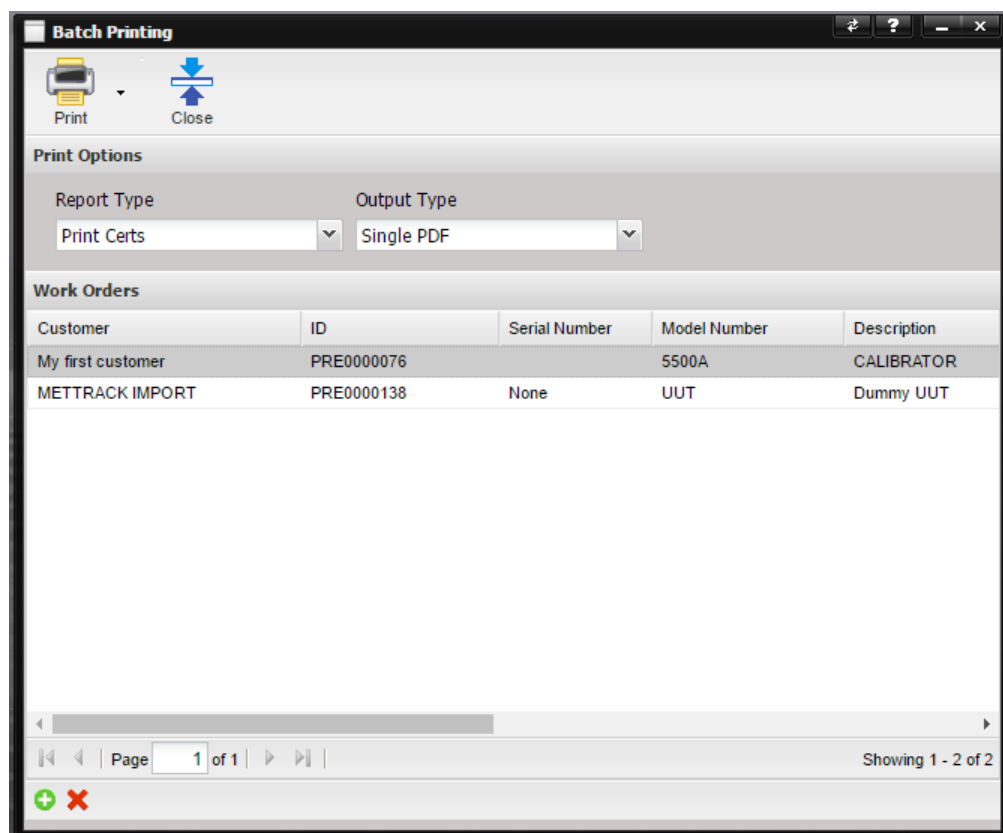


Continue receiving the Assets using the Receiving screen.

Batch Printing

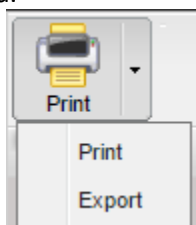
The Batch Printing option is for generating certificates, Work Order reports, or stickers for multiple work orders at once. The certificates and stickers are defined on each Work Order. The filenames are controlled on the Work Order for the certificates and the stickers. The Work Order is the standard Work Order report.

The output is a combined PDF or compressed archive (ZIP) of individual PDFs.



Report Type – The type of report to print (selection: Certs, Stickers, or Work Orders).

Output Type – The output file type is dependent on the selection made when the down arrow next to the Print button is selected.



- **Print** - a single PDF (all reports combined into one PDF) or to a ZIP file (each report is a separate PDF).
- **Export** – a ZIP file (each report is a separate XLS).

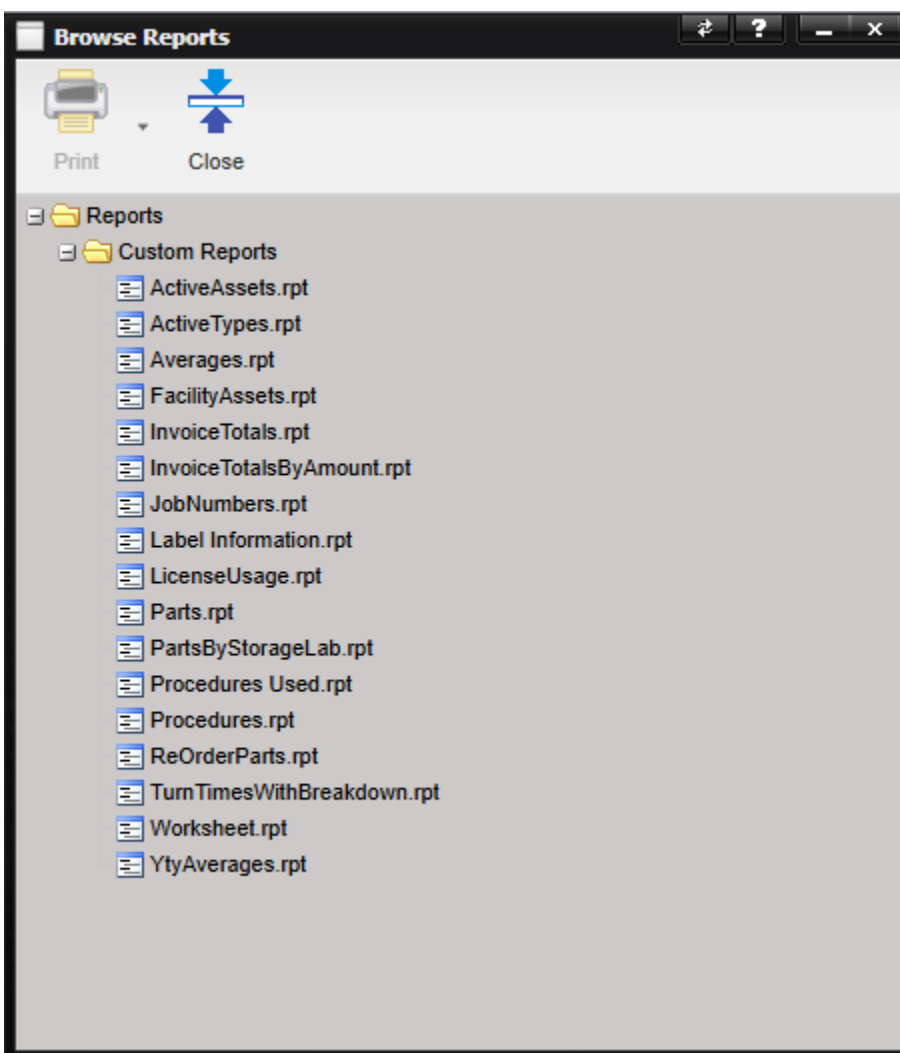
The Work Order information is displayed in the grid. To add Work Orders, use the “+” button at the bottom of the grid. Use the “X” button to remove a Work Order from the list.

As with the Cert button for single printing from the Work Order, if it is closed and a historic Current Cert exists, it will be pulled from the Files tab, rather than generating a new one.

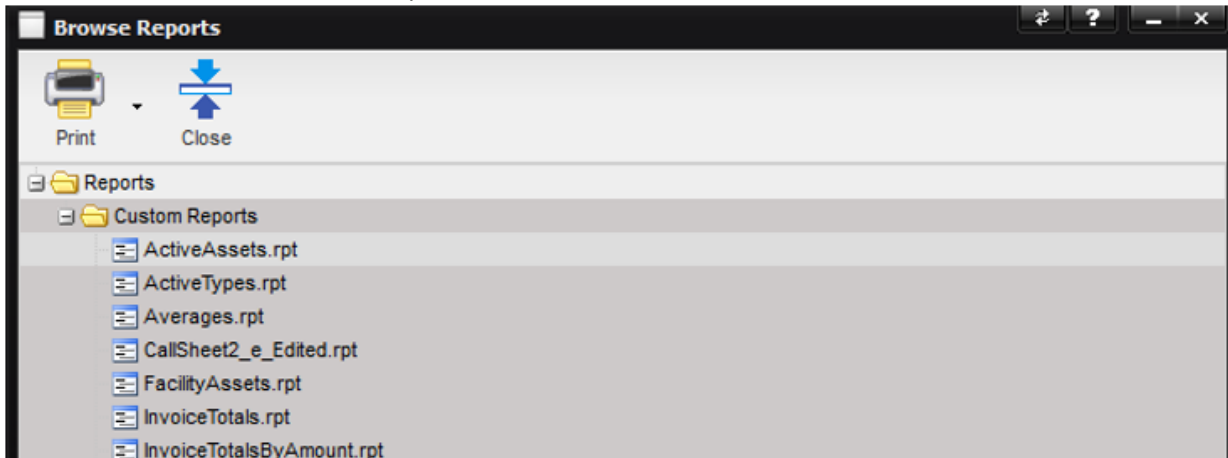
Custom Reports

Unlike system reports, which are tied to a particular screen and receive their run time parameter values automatically from the calling screen, Custom Reports are run standalone and present prompts to be filled in, if needed, for their run time parameters. Some examples of reports that require additional information and for which a prompt screen is displayed are: *InvoiceTotals.rpt* (requires Start Date and End Date), *InvoiceTotalsByAmount.rpt* (requires Start Date and End Date), and *Worksheet.rpt* (requires WO Number).

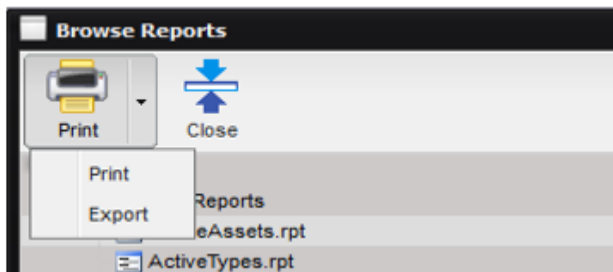
The *PartsByStorageLab.rpt* has an optional parameter which filters parts report by the Storage Lab. If the parameter is left blank, a report with all parts is generated and grouped by the Storage Lab. The Storage Lab parameter can be the full lab name or a portion of the lab name. The parameter is used to search for any part containing the entered text.



To run a report, either double-click the report in the list (which defaults to creating a .PDF) or highlight a report and then select the Print button. When a report is selected from the list, the Print button is enabled.

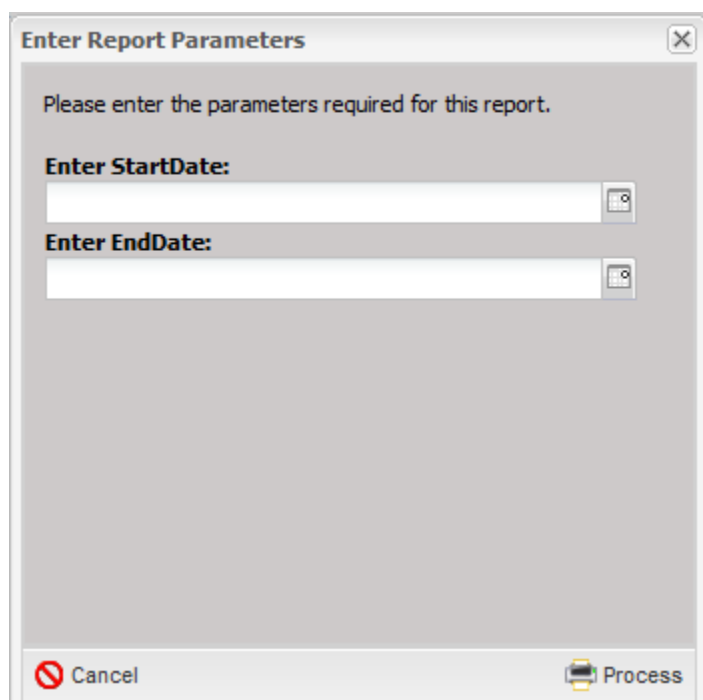


The Print button provides the options to Print or Export.



- Selecting the Print option displays the report as a .PDF in a separate browser tab.
- Selecting the Export option, exports the report to a .CSV file.

If parameters are to be supplied, a prompt screen is displayed for entering information needed for the report.

Example: Parameters

Type in or use the controls to select values for each parameter on the prompt.

Certain parameters may be populated automatically based on known information, such as:

- **nUserID** - Current logged in user's unique ID (from Users table)
- **nFacilityUID** - Current logged in user's active facility's unique ID (from Facilities table)
- **nVersionUID** - Current MET/TEAM version's unique ID (from Version table)

These values are all shown in the form of a specially formatted identifier known as a GUID (Globally Unique Identifier) and can optionally be replaced with another valid GUID which represents an existing database record from the indicated database tables. If the provided values do not match existing database records, the report may not generate as expected or may not reflect accurate information.

Note: Although the Crystal Report Designer allows for symbols (i.e. +, *, \$, #, etc.) in parameter names, symbols should not be used in parameter names when writing reports for use with MET/TEAM.

Complete the required parameters. Press the Process button to generate the report.

Example: .PDF View

Active Assets					
Gowtham's Facility 01					
ID	Description	Manufacturer	Model Number	Serial Number	Disposition
PRE0000123	Test	Gowtham's Facility C	12-45-78		In Service
PRE0000050	10,000 OHM RESISTANCE STD	FLUKE	742-10K		In Service
PRE0000456	Test	Gowtham's Facility C	12-45-78		In Service
3 Asset for 'Gowtham's Facility 01'					
MET/TEAM Report: ActiveAssets.rpt					
Page 1/4					
Print Date: 7/15/2016 12:35:45 PM					

Example: .CSV File

Gowtham's Facility 01						
ID	Description	Manufacturer	Model Number	Serial Number	Disposition	
PRE0000123	Test	Gowtham's Facili	12-45-78		In Service	
PRE0000456	Test	Gowtham's Facili	12-45-78		In Service	
2 Asset for 'Gowtham's Facility 01'						
Gowtham's Test 02						
ID	Description	Manufacturer	Model Number	Serial Number	Disposition	
PRE00045612	Gowtham's Type 02	Gowtham's Facili	1236-898-123		In Service	
1 Asset for 'Gowtham's Test 02'						
METTRACK IMPORT						
ID	Description	Manufacturer	Model Number	Serial Number	Disposition	
PRE0000010	METTRACK IMPORT	METTRACK IMP	N/A		In Service	
PRE0000011	METTRACK IMPORT	METTRACK IMP	1235464654-456465-12356489-45684		In Service	
PRE0000037	METTRACK IMPORT	METTRACK IMP	1235464654-456465-		In Service	
3 Asset for 'METTRACK IMPORT'						
Shivaraju's Facility 01						
ID	Description	Manufacturer	Model Number	Serial Number	Disposition	
PRE0000004	Shivaraju's Asset 01	Shivaraju's Facilit	1234655	12341	In Service	
PRE0000007	Shivaraju's Type 01	Shivaraju's Facilit			In Service	
PRE0000008	d	Shivaraju's Facilit			In Service	
3 Asset for 'Shivaraju's Facility 01'						
9 Total Assets						

Alerting Schedules

The Alerting Schedules option allows adding and editing scheduled alerts and emails. The New or Edit Scheduled Alert screen is displayed.

- **Alert Name** – The name of the Alert used to identify each Alert.
- **Active** – Whether this Alert is Active or not.
- **Report Name** – Displays a list of available reports.
- **Data Check** – You may select a data check to run whenever this alert is triggered. Such functionality enables database cleanup (since a Data Check may run SQL) as well as conditional logic.

***Note:** Only Data Checks of type “runnable” should be scheduled.*

- **Alert Parameter Sheet** – Displays the Report Parameters screen for entering parameters related to the report. The parameters are specific to the report being used. The labels for each parameter describe the data required.

If the report parameter name is **exactly** equal to 'nFacilityUID' an option will be available for selecting a record using a lookup picker as displayed in the following Report Parameters screen.

In addition to the lookup picker, a checkbox is available on the right side of the control. Checking this checkbox, automates MET/TEAM to derive the relationship between the contact receiving the email and the value for the report.

Note: *If there are more than values found, multiple reports are generated and sent to the contact.*

- Enter the required data and select the Save button. Date fields require a range as shown below.
- The offset is relative to the day in which the report runs.
- The options are: “+” quantity [days, months, year] or “-” quantity [days, months, year].
- **Email Subject** – The content of the subject of the email that is sent to each contact.
- **Email Body** – The content of the body of the email that is sent to each contact.
- **Schedule Grid** – Displays each time this Alert is scheduled to run.
 - **Period** – The occurrence of the Alert: Daily, Weekly, Monthly.

- **Next Run** – The time in PC local time that the alert will next run.
- Select the “+” Add button to add a new schedule. The New Schedule screen is displayed.

- **Period** – The occurrence of the Alert: Daily, Weekly, Monthly. If Weekly is selected, the day of the week can be selected.
- **Hour** – The hour of the day the Alert will occur.
- **Minute** – The minute of the hour of the day the Alert will occur.
- **Contacts Grid** -Displays the contacts that will receive the Alert. You may only add a contact to the grid once. Duplicates are not allowed.

The Save button at the top of the Alert screen must be selected before adding Schedules or Contacts to the Alert.

Copying an Alert

The Copy button allows for copying the current Alert. When this button is selected, the Add Alert* screen is opened. The border of the Add Alert* screen is yellow indicating that this screen is the copy. The border stays yellow until the screen is closed.

When an alert is copied, all information from the Alert screen is applied to the new Alert. The name is changed from “Name” to “Copy of – Name”. Changes should be made to the new Alert immediately after selecting the Save button on copy, to avoid sending out the same notifications twice. Once the Save button is pressed, the grids are populated.

Alerting Contacts

MET/TEAM supports dynamic alerting if configured properly. For example: assume you have two contacts associated with an Alert and each contact is assigned a distinct facility. Furthermore, let’s assume your report has the parameter **nFacilityUID**. In this case, MET/TEAM will automatically populate the parameter for each contact when it generates the report. This allows dynamic reporting.

Note: *If a report generates no data, it will not be emailed to the respective contact.*

Alerting Contact Tokens

The Alerting supports adding “tokens” to the email body. These tokens are replaced with the information about the Contact receiving the email.

[name]	This token will be replaced with the “first” + “last” name of the contact receiving the email.
[full name]	This token will be replaced with the “first” + “last” name of the contact receiving the email.
[first]	This token will be replaced with the “first” name of the contact receiving the email.
[first name]	This token will be replaced with the “first” name of the contact receiving the email.
[last]	This token will be replaced with the “last” name of the contact receiving the email.
[last name]	This token will be replaced with the “last” name of the contact receiving the email.

For example:

If the email Subject and Body were as follows:

Subject: Monthly Recall Report

Body: [name], see all items currently due.

The token [name] would be replaced with the full name of the contact who is receiving the respective email.

Alerting Settings

Alert Engine settings are configured on the Alert Engine Configuration screen found by selecting the Alert Engine Configuration option in the Configure menu.

Note: These settings are required to be configured prior to the Alerting Engine being run.

The following is a list of System Defaults that are also used in the Alerting Module.

- Reports - Default Reports directory (make sure this path ends with a backslash “\”)
- Reports - Default System directory (make sure this path ends with a backslash “\”)

Incorporating Tool Assignment with a Recall Alert

A scheduled Recall report can be setup based on Tool Assignment criteria. The report “Recall-Alerting-ToolAssignment.rpt” was designed to meet this need.

Setting up the Asset

This functionality can be applied to any Asset. However, the Asset must meet specific criteria to function properly with the report “Recall-Alerting-ToolAssignment.rpt”. These criteria are set on the Asset screen.

- ☒ Active ☐ Standard
☒ Recalled Asset ☒ Not Tracked
☐ On Site ☐ Optional

- | Due Date | Service Type | Service Date | Interval | Service |
|------------|--------------|--------------|----------|-------------|
| 11/23/2013 | Calibration | 10/29/2013 | 25 Days | Calibration |
- 1 of 1
- Showing 1 - 1 of 1

- 358

- The Contact must be assigned to the Tool Assignment.
- The Tool Assignment Return Date must be blank. The Tool Assignment has not been returned.

Alerting Schedule

The scheduled Alert must be setup.

- The Tool Assignment Contact must be in the Scheduled Alert Contacts list.
- If a Contact is in the list and the Contact does not have an overdue Assets assigned to them with Tool Assignments, the Contact will not receive an email. Only Contacts with overdue Assets assigned to them through Tool Assignment will receive an email.
- The Report Name must be "Recall-Alerting-ToolAssignment.rpt".
- The Alert Name must be ***Recall Alert.***

Note: This Alert Name is referenced in a later section.

Edit Schedule Alert

Find Copy Add Delete Save Cancel Close

Alert Name: Test Recall

Data Check: [...]

Report Name: Recall-Alerting-ToolAssignment

Alert Parameter Sheet: User-Defined Value

Email Subject: Test Recall

Email Body: Test Recall Message, these Parts are overdue

Schedule

Period	Next Run
Daily	05/08/2014 14:00

Contacts

Full Name
A. CASE
B. COLEMAN
B. EICHNER

- The report parameter is setup by selecting the ellipsis next to the Alert Parameter Sheet field.
- This report was designed to have a single parameter “nContactUID”. MET/TEAM is programmed to automatically replace that specific token with the respective contact who will be receiving the report which allows for customization per Contact.
- Next close the parameter screen and press ‘Save’ on the Edit Scheduled Alert screen.

Using a Data Check to Manage the Tool Assignment Recall Alert Recipients

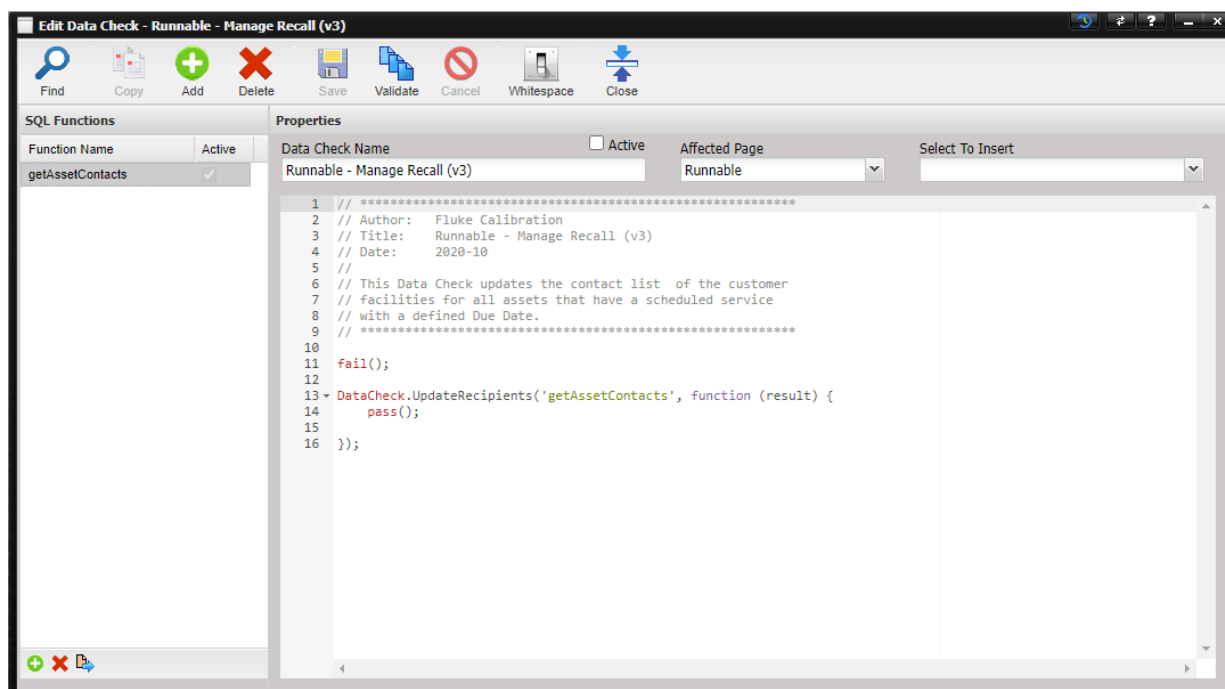
An understanding of Data Checks and SQL script is recommended when using this functionality. An advanced Data Check is used to manage the Scheduled Alert setup for the “Recall-Alerting-ToolAssignment.rpt”.

Note: The SQL script creates a Data Check called “Runnable - Manage Recall”.

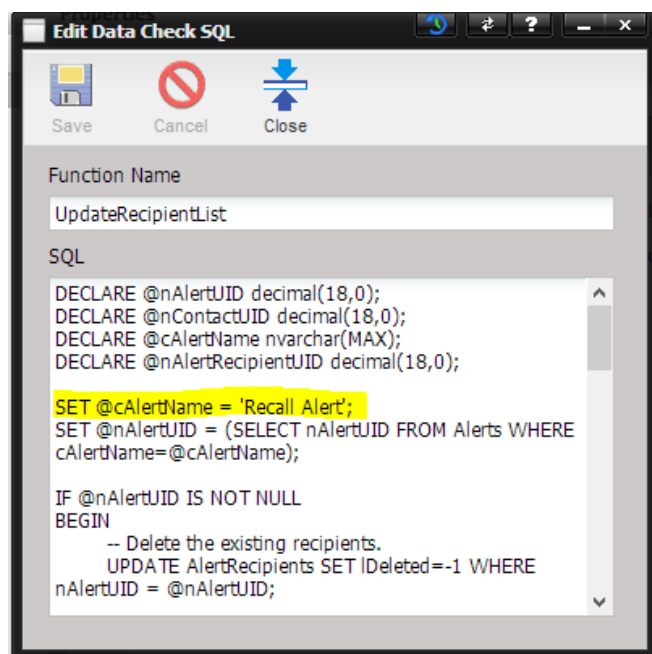
Customizing the Data Check

The Data Check must be configured for a single Recall report. If there is a need to use this Data Check on more than one Recall report, a separate Data Check must be created. The SQL script can be customized by following these instructions.

- Log in to MET/TEAM as an Administrator.
- Go to Configure menu Data Checks submenu.
- Select the Data Check “Runnable – Manage Recall”.
- Select the Quick Link button underneath the “SQL Functions” list (at the bottom of the page). This will allow us to configure the SQL script.



- The Edit Data Check SQL screen is displayed. Look for the line highlighted in the following screenshot and change the value to exactly match your Recall Alert name. (If you followed the earlier portion, this value should be 'Recall Alert').



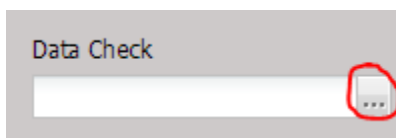
Once the necessary changes have been made, select the Save button. Close the Data Check.

Associating the Data Check to the Scheduled Alert

Once the Data Check has been configured, it must be associated with the Scheduled Alert.

- Go to Reports menu Alerting Schedules submenu.
- Find the Scheduled Alert.

- Select the ellipsis button next to the Data Check field on the Scheduled Alert screen.



- The Manage Data Check Scripts screen is displayed. Select the item titled “Runnable – Manage Recall”.
- Double-click the Data Check “Runnable – Manage Recall”. The Data Check is now displayed on the Scheduled Alert screen.
- Save the Scheduled Alert.

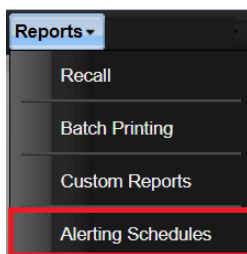
Everything is now configured and Scheduled Alert will fill in the Contacts when run.

Using a Data Check to Manage Recall Escalation Recipients with an Alert

An understanding of Data Checks and SQL script is recommended when using this functionality.

Setting up a recall escalation report is possible using a default Data Check that is pre-configured to work with our standard “Recall-Alerting-FCL-w-Level.rpt” report.

1. To begin, create a new Alert Schedule by navigating to Reports -> Alerting Schedules.

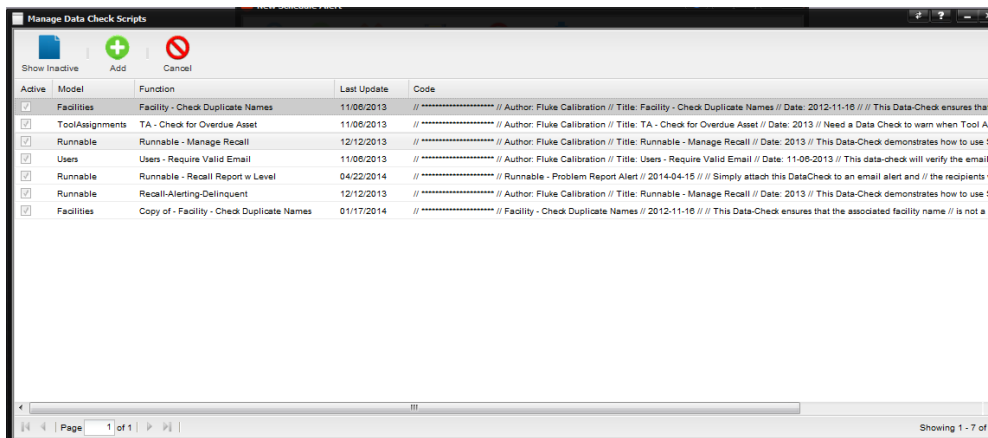


2. The Find Alert screen is displayed. Select the “+” Add button and the New Schedule Alert screen is displayed.

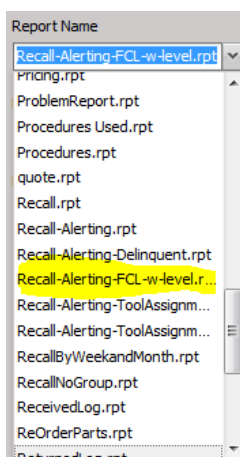
 A screenshot of a software window titled 'New Schedule Alert'. The window has a toolbar at the top with icons for Find, Copy, Add, Delete, Save, Cancel, and Close. Below the toolbar are several input fields: 'Alert Name' (a text box), 'Data Check' (a dropdown menu with an ellipsis button), 'Report Name' (a dropdown menu), 'Alert Parameter Sheet' (a dropdown menu with an ellipsis button), 'Email Subject' (a text box), and 'Email Body' (a large text area). On the right side of the window is a 'Contacts' section with a table header 'Full Name'. At the bottom of the window is a 'Schedule' section with a table that has columns for 'Period' and 'Next Run'. There are also small icons for adding, deleting, and saving at the bottom left and right of the main content area.

3. Enter a name for this Alert in the Alert Name field. Any title will suffice.

- Next, select the data check. A default Data Check has been provided with MET/TEAM titled “Runnable – Recall Report w Level”. The purpose of this data check is to automatically populate the recipient list prior to the report being executed. The Data Check is pre-configured to detect which contacts should receive the report and react accordingly.

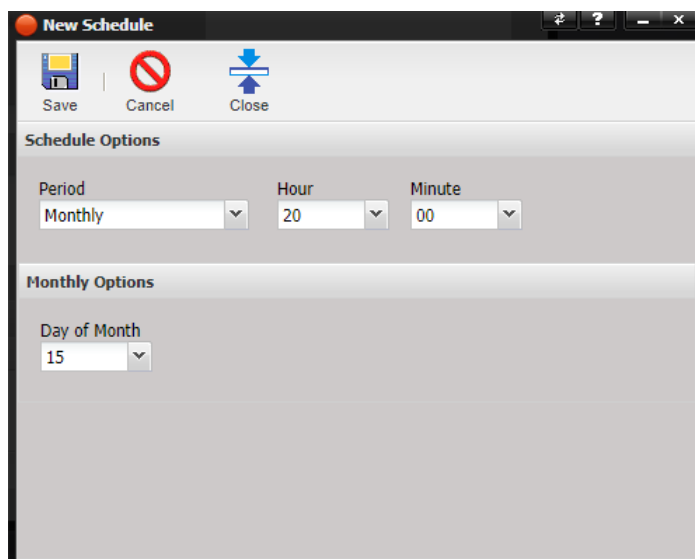


- Now select the actual report. By default, MET/TEAM ships with a report titled “Recall-Alerting-FCL-w-level.rpt”.

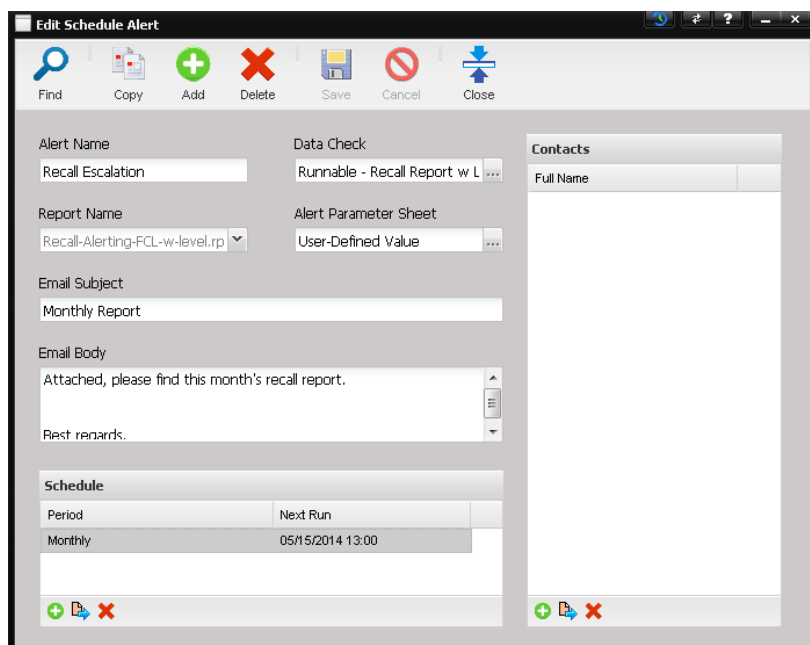


- Select the “...” next to the Alert Parameter Sheet field and the Report Parameters screen is displayed for entering specific details regarding this instance of this report.

- **nContactUID** – This parameter is automatically populated by the Alerting Engine and requires no further interaction.
 - **tStartDate** – This parameter is used to specify the starting date for the recall escalation process. Any asset with a “Next Maintenance Date” between the two parameters tStartDate and tEndDate is eligible for recall escalation.
 - **tEndDate** – This parameter is used to specify the ending date for the recall escalation process.
 - **nManagerLevel** – This parameter is used to specify how far up the hierarchy escalation should go. The value must be 0 (contact level), 1 (contact manager’s level), 2 (contact manager’s level manager’s level), or 3 (contact manager’s level manager’s level, manager’s level). Providing three levels of manager escalation.
 - For example: suppose there is a contact named Sam Smith who is associated with Facility by the name of One Lab and whose manager is Bill Jones. Within One Lab, an asset is currently overdue for maintenance. If the nManagerLevel parameter is set to 1, Bill Jones will receive an email which lists the overdue asset.
7. Fill in the tStartDate, tEndDate, and nManager level fields. Select the Save button and then the Close button to save the parameter settings and close this screen.
 8. Enter an Email Subject and Email Body with the message to be included in the email.
 9. Set up a schedule by selecting “+” button underneath the Schedule grid. The New Schedule screen is displayed. Fill out the information on this screen to specify the frequency that the report will be sent. Select the Save button and then the Close button to save and close the Alert schedule.



10. After completing all the steps, the Schedule Alert screen should look similar to the screenshot below.



11. Save this Schedule Alert and that's it! You are now setup for recall escalation.

Setup Menu

The Setup menu is for setting up: Contacts, Users, and Services.

Contacts

The Add Contact screen allows the user to enter information related to a Contact for a Facility.

Note: Only Administrators or Configurators can add Contacts.

Edit Contact - Sam Swenson

Find Add Delete Save Cancel Close

☒ Active

Contact ID: sswenson@123.com User: ...

First Name: Sam Fax: 253.142.1010 Type: Default

Middle Name: Phone 1: 253.142.1111 Extension: 456

Last Name: Swenson Phone 2: Cell Phone:

Suffix: Email 1:

Description: Technician Manager: Mr Lee

Notes:

Facility Name: Fluke Facility Number:

Page 1 of 1 Showing 1 - 1 of 1

- **Active** – Marks the Contact as active.
- **Contact ID (required)** – Unique identification for the Contact.
- **First Name** – First name of the Contact.
- **Middle Name** – Middle name of the Contact.
- **Last Name** – Last name of the Contact.
- **Suffix** – Suffix associated with the last name.
- **Description** – A description of the Contact type.
- **User** – The User associated with this Contact. A User is someone who can login to the MET/TEAM application.
 - The User can be changed by selecting the “...” button.
 - When the User is selected, the First Name, Last Name, Phone 1, Phone 2, and Email 1 are filled in from the User information. This information does not overwrite what currently exists on the Contact screen. The Facility grid will be populated once the Save button is selected.
- **Fax** – Facsimile number of the Contact.
- **Type** – Pick list defining the type of Contact.
- **Phone 1** – Primary phone number of the Contact.
- **Extension** – Extension number of the Contact.
- **Phone 2** – Secondary phone number of the Contact.
- **Cell Phone** – Mobile phone number of the Contact.
- **Manager** – Supervisor for this Contact. The supervisor must be saved as a Contact.
 - The Manager can be changed by selecting the “...” button.

- **Email 1** – Primary email address of the Contact.
- **Notes** – Notes about the Contact.

Facility Grid

The Facility Grid contains the Facilities that this Contact is associated with.

Facility Name	Facility Number
Fluke	

Page 1 of 1 | Showing 1 - 1 of 1

Contacts are added to Facilities by selecting the “+” (add) button.

Contacts are removed from a Facility by selecting the “X” (delete) button.

To edit the Facility for this contact, highlight the Facility in the Facility Grid and select the Quick Link button. The Edit Facility dialog is displayed.

Users

The Users menu is used to add, remove, modify, and manage user information, security access, and lab access.

Edit User - Samuel Jones

Find Add Delete Groups Save Cancel Close

First: Samuel [Active] Last: Jones Phone 1: Phone 2: Initials: sj Stamp #: Username: sjones Employee #: Password: [Change] Pay Grade: Email 1: Email 2: Last Login: 02/22/2022

Facility Name	Lab Type	Default
cal-1	Default	<input type="checkbox"/>
MT	Default	<input checked="" type="checkbox"/>

Page 1 of 1 | Showing 1 - 2 of 2

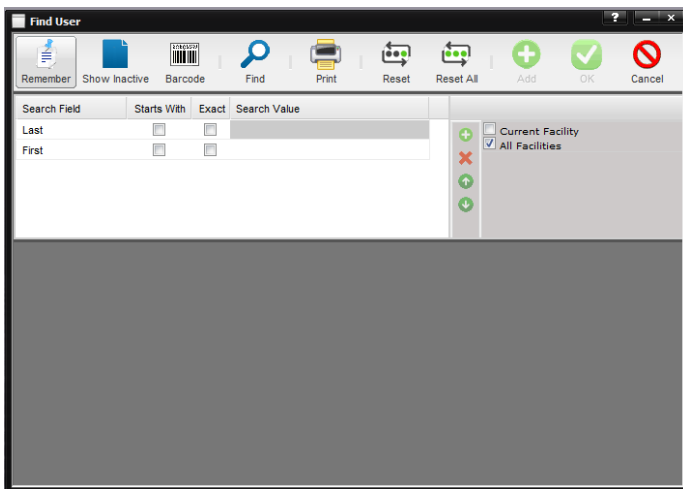
- **First** – First name of the User.
- **Last** – Last Name of the User.

- **Initials** – The User’s initials. Initials are used for the calibration sticker.
- **Username** – Name given to the User to log on to MET/TEAM.
- **Password** – The User’s password. This value cannot be seen by anyone, including the administrator. There are no minimum or maximum length requirements for passwords.
 - If the User has forgotten his/her password, the User can change his/her password when logging in. See the Help section “Change Password from Log-In”.
 - An Administrator can also reset the User’s password from the edit User screen by pressing the Change button.
- **Email 1** – The User’s primary email address.
- **Email 2** – The User’s alternate email address.
- **Active** – If checked, the User name appears in the drop down lists.
- **Phone 1** – The User’s primary phone number.
- **Phone 2** – The User’s alternate phone number.
- **Stamp #** – Stamp number issued to the User.
- **Pay Grade** – Pay grade of the User.
- **Employee #** – The number the employee is given by the employer.
- **Last Login** – The date and time that the User last logged in to MET/TEAM.

Adding Users

Users can be added either by selecting the Setup menu Users option or from within the Users screen selecting the Add button.

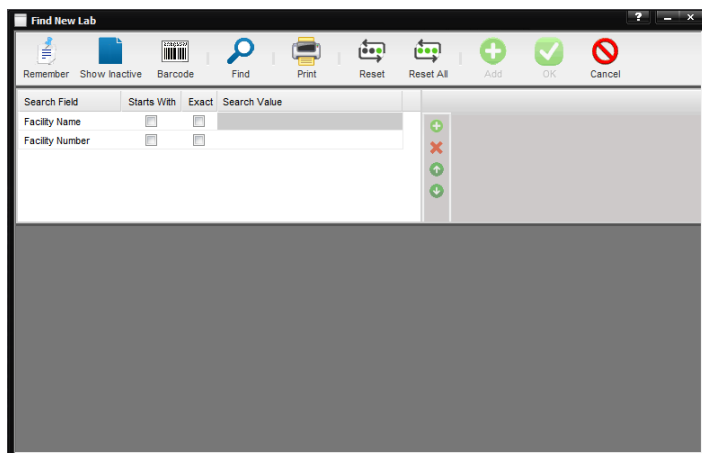
The Find screen is displayed.



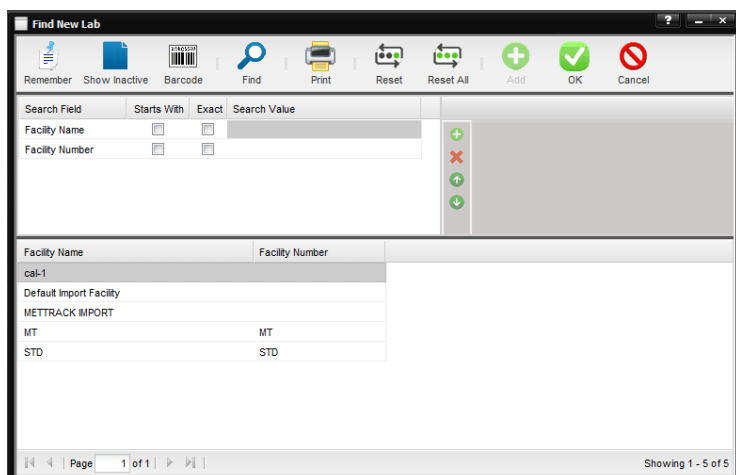
Select the Cancel button and the Add User screen is displayed. Required fields are outlined in red. When the mouse hovers over a required field, a tooltip is displayed stating that the field is required.

Fill in the attributes for the user and select the Save button when all desired attributes are complete.

A message is displayed stating that the User must be associated with a Lab. Select OK on the prompt. The Find New Lab screen is displayed.



Select the Find button and the list of Facilities to select as the Lab for this User is displayed.



Select the Lab and the Edit User screen is displayed. The Facility Grid displays the Lab you selected for this User.

Facility Grid

The Facility Grid contains the labs in which this user can work.

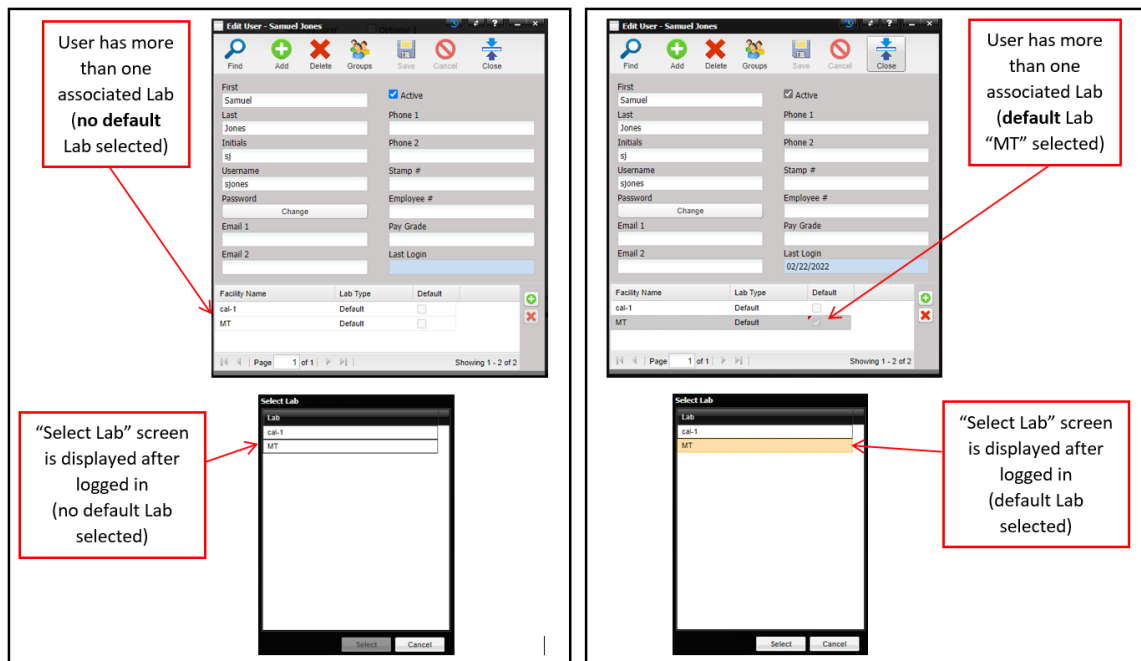
Facility Name	Lab Type	Default	
MT	Default	<input checked="" type="checkbox"/>	<div>+</div> <div>-</div>
<div> <div>Page 1 of 1</div> <div>Showing 1 - 1 of 1</div> </div>			

The “+” button below the grid can be used to add a lab or the “X” button can be used to delete a Lab.

Note: When creating or editing a Facility from the Maintenance menu Facility submenu, a Facility must be setup as a Lab to be added to this grid.

If more than one lab is added and listed in this grid, the user is prompted at log in with the Select Lab dialog to select which lab they wish to log in to.

- If a lab is marked as default, it appears highlighted in the Select Lab dialog, allowing the user to log on quickly.
- The user is not required to have a default lab; it is simply a convenience. To set a lab as a default, double click the lab and select “Yes” when the prompt appears.



Assigning Groups (User Rights)

When a User is set up, the Administrator decides what Security Group(s) a User is assigned to.

A User is not required to be assigned to any Security Groups. If a User is not assigned to any Security Group, the User has rights to those functions that have been enabled or made visible for 'Everyone' through the Edit Control Security screen, which is only available to Users in the Administrator and Configuration Groups. See your MET/TEAM Administrator for further details.

Security Groups are used to determine what the User is allowed to do.

- When creating a new User, you must save the User account settings before you can assign the User to Security Groups.
- The Groups button can also be used to assign a User to one or more Security Groups.
- When attempting to close the Edit User screen, a prompt is displayed asking if you want to assign the User to a Security Group.

Edit User - Samuel Jones

Find Add Delete Groups Save Cancel Close

First: Samuel ☒ Active

Last: Jones Phone 1:

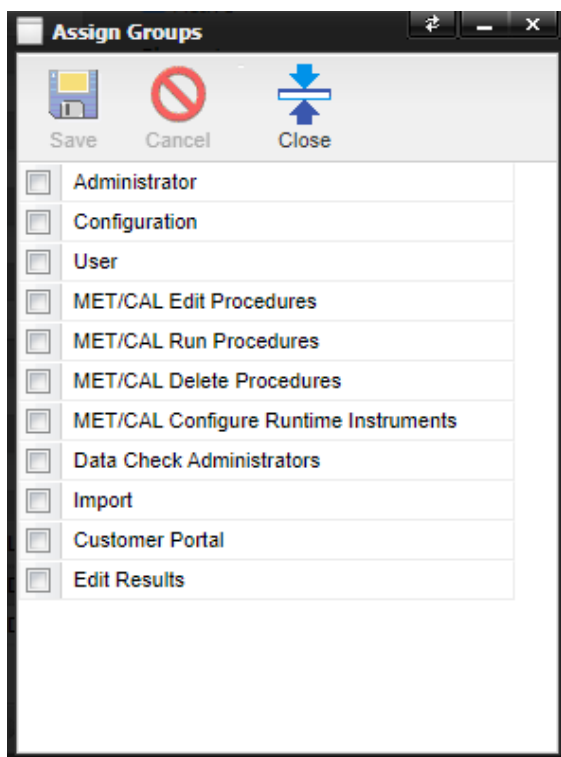
Initials: sj Phone 2:

Email 2: Last Login:

Facility Name	Lab Type	Default
cal-1	Default	<input type="checkbox"/>
MT	Default	<input checked="" type="checkbox"/>

Page 1 of 1 Showing 1 - 2 of 2

Select Yes to open the Assign Groups screen or select No to continue to close the Edit User screen without assigning the User to a Security Group.



The MET/TEAM application includes a default set of Security Groups. Additional Security Groups can be added by a trained Administrator. For more information, see the section

Display Type	Function	Field Type
Numeric	Number Input	nField
Text	Text Input	cField
Combo	Drop Down	cField/mField
Date	Date Input	tField
Currency	Currency Input	nField
Memo	Long Text Input	mField
Boolean	Check box Input (Logical)	lField

Groups.

Note: *Never change the name of a default Security Group as this could cause permissions to not be properly recognized or honored.*

Being a member of the Administrator and Configuration groups provides a User with the ability to disable and enable buttons, menus, and the Setup menu.

Being a member of the User group provides a User with the ability to “use” the application as configured by the Administrator.

Being a member of the “MET/CAL ...” groups, Data Check Administrators group, or Import group allows a User perform the indicated functionality. If a User needs to perform any of these functions and does not have access, a message is displayed, or the related menu is disabled.

- **Administrator** – Highest level of access for MET/TEAM, no restrictions within MET/TEAM. A User in this group...

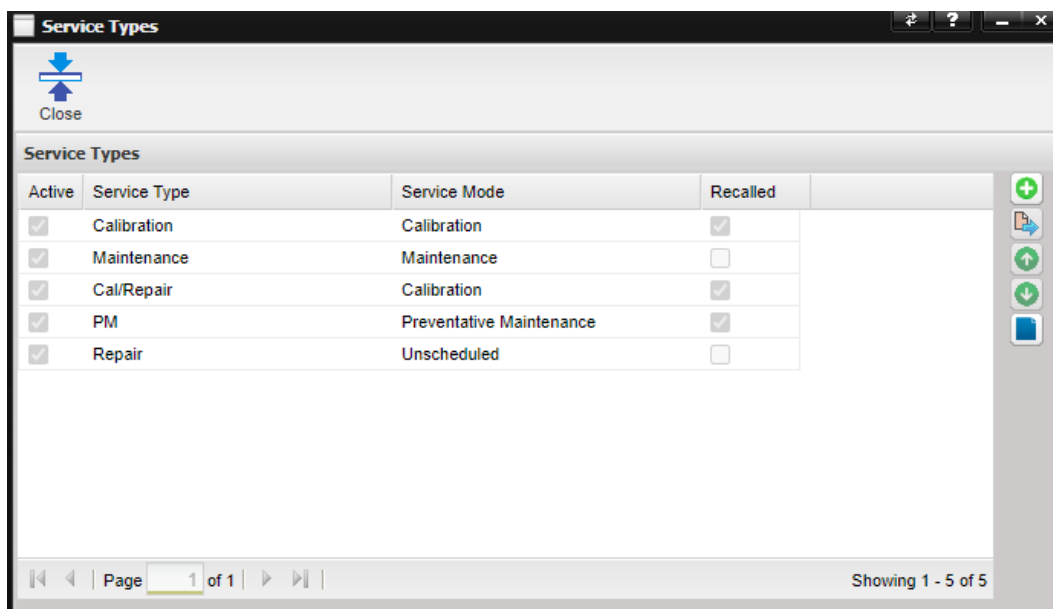
- Has access to the Configure menu and all functionality contained within that menu.
- Can configure individual screens using the right-click functionality.
- Can create Data Checks.
- Can Import data into MET/TEAM.
- Can assign Users to Groups.
- Can reset an individual User's password.
- **Configuration** – One level of access below Administrator. A User in this group...
 - Has access to the Configure menu and all functionality contained within that menu.
 - Can configure individual screens using the right-click functionality.
 - Can create Data Checks.
 - Can Import data into MET/TEAM.
- **Import** – Required to Import data into MET/TEAM.
- **MET/CAL Configure Runtime Instruments** – Required to alter instrument and workstation specific configuration details using the MET/CAL Runtime application's CONFIGURE tab. The User must also be assigned to the MET/CAL Run Procedures group to log in to the MET/CAL Runtime application.
- **MET/CAL Delete Procedures** – Required to delete a procedure from proc.dir using the MET/CAL Editor application. The User must also be assigned to the MET/CAL Edit Procedures group to log in to the MET/CAL Editor application.
- **MET/CAL Edit Procedures** – Required to edit MET/CAL procedures using the MET/CAL Editor application. Allows the User to log in to the MET/CAL Editor application.
- **MET/CAL Run Procedures** – Required to run a MET/CAL procedure in the MET/CAL Runtime application. Provides read-only access to the MET/CAL Runtime application's CONFIGURE tab and full access to the MET/CAL Runtime application's SETUP and RUN tabs.
- **Edit Results** – Required to edit calibration results on the MET/TEAM Work Order Results tab. Provides access to all tabs under the MET/CAL Runtime application's CONFIGURE tab.
- **User** – Basic level of access needed to use MET/TEAM. A User that only belongs to this group ...
 - Cannot perform any Administrative tasks.
 - Cannot perform any Configuration tasks.
 - Cannot perform any Data Check tasks.
 - Cannot perform any Import tasks.
 - Cannot perform any MET/CAL tasks.
 - Cannot create a new user.
- **No Group Assigned** – Lowest level of access needed to use MET/TEAM.
 - If a User is not assigned to any Group, the User has rights to those functions that have been enabled or made visible for 'Everyone' through the Edit Control Security screen. Functionality is customizable by the Administrator and may have been changed from the initial MET/TEAM deployment.






Restricting access to or visibility of a given menu option or screen is done using the Menu Security option in the Configure menu.

Restricting access to or visibility of a specific field or button on a screen is done using the Edit Control Security option when right-clicking the field label or button.

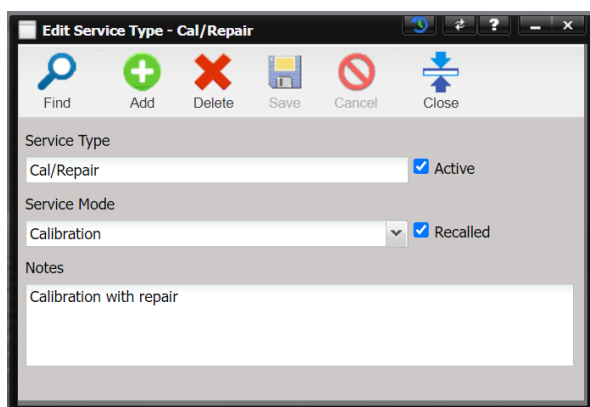
Services

The Services option is for adding, editing and ordering Service Types. The screen displays a list of available Service Types.



-  Add Service Type – Opens the Add Service type screen to create a new service type
-  Edit Service Type – Opens the Edit Service type screen to edit the selected service type
-  Move Up – Moves the selected service type up in the list
-  Move Down – Moves the selected service type down in the list
-  Show Inactive – Toggle button switches between including or not including inactive service types in the list.

The order of the list determines the order in which items appear in dropdowns on the Work Order, Receiving, Procedures, and Type Procedures screens.



When adding Service Types, the Save is **case-insensitive**.

- **Service Type** – The name of the service type such as 'Cal/Repair', 'Calibration', 'PM', 'Repair'.
- **Active** – If checked, the Service Type is visible in other parts of MET/TEAM. Service Type is selectable from a non-editable dropdown on the Work Order, Receiving, Procedures, and Type Procedures screen.
Note: Service Type can only be customized by using the Setup menu Services submenu screen.
- **Service Mode** – The mode of service being created ('Calibration', 'Unscheduled', and 'Preventative Maintenance').

- **Recalled** – If checked, this service type is used when determining recall notices. A Service Mode must be checked as Recalled to be used in the Assets Scheduled Services grid.
- **Notes** – Notes pertaining to the service type.
- Highest level of access, no restrictions.

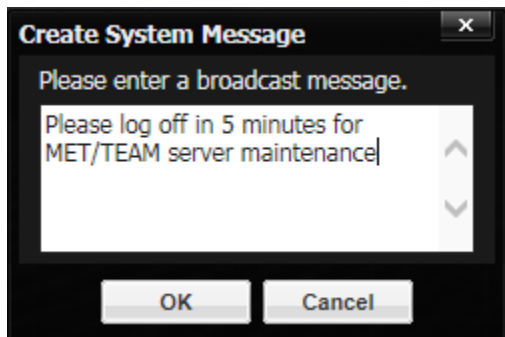
Note: When saving a Service Type, the Save is **case-insensitive**. For example: “Calibration” and “calibration” are the same and only one Service Type of Service Mode “Calibration” can be exist.

Configure Menu

The Configure Menu is used for configuring the application specifically to your installation. This menu is only available for users with administrative or configuration privileges.

Send System Message

The Send System Message menu allows for entry of a message to be broadcast to all MET/TEAM users on the server.



System Defaults

The System Defaults menu contains defaults used throughout MET/TEAM. These system defaults are systemic, the changes made affect all users within MET/TEAM.

The Find System Default screen is displayed when from the Configure menu System Defaults submenu.

1. For **Receiving**, **Receiving – Priority**, and **Returning** System Defaults, additional records can be added. Customers can add any number of reports to be printed from the Returning and Receiving Print by adding another System Default.
2. All reports specified in the System Default(s) “Returning” or “Receiving” are printed from the Print button on the Returning and Receiving screen, respectively.
3. The order these reports print is based on the System Default Order. If there are more than one Returning (or Receiving) System Defaults with Order =1, it still prints the reports.
4. The Returned By field on the Work Order only prints the report that is in the System Default Returning where the Order=0.

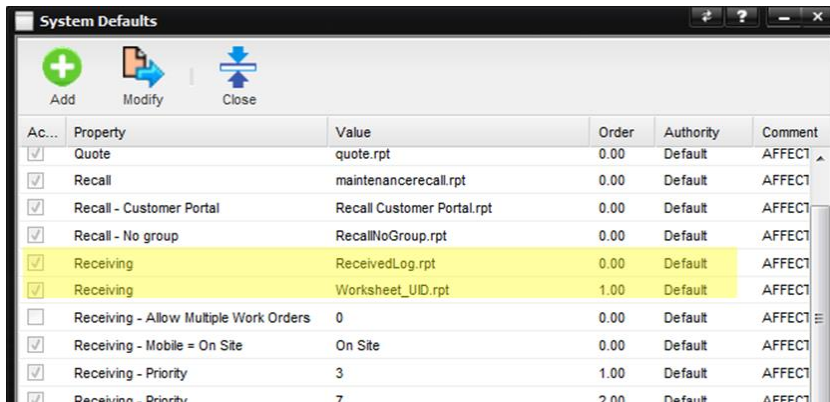
1. Making the property of Returning and Receiving System Defaults unique is not going to work. We have existing customers with multiple Returning and Receiving System Defaults so they can print multiple reports from these Print buttons.
2. The Returning and Receiving Print buttons must print the multiple reports specified in the System Defaults. Now that we've added Export to the Print button, the Export must export the multiple reports also.
3. If I have setup 4 Returning reports in the System Default and have the Order= value set to 0, 1, 2, 3 the reports must print in that order.

Adding a System Default

A System Default can be added by selecting the “Add” button on the screen toolbar. Generally, these additional System Defaults are added for printing multiple reports.

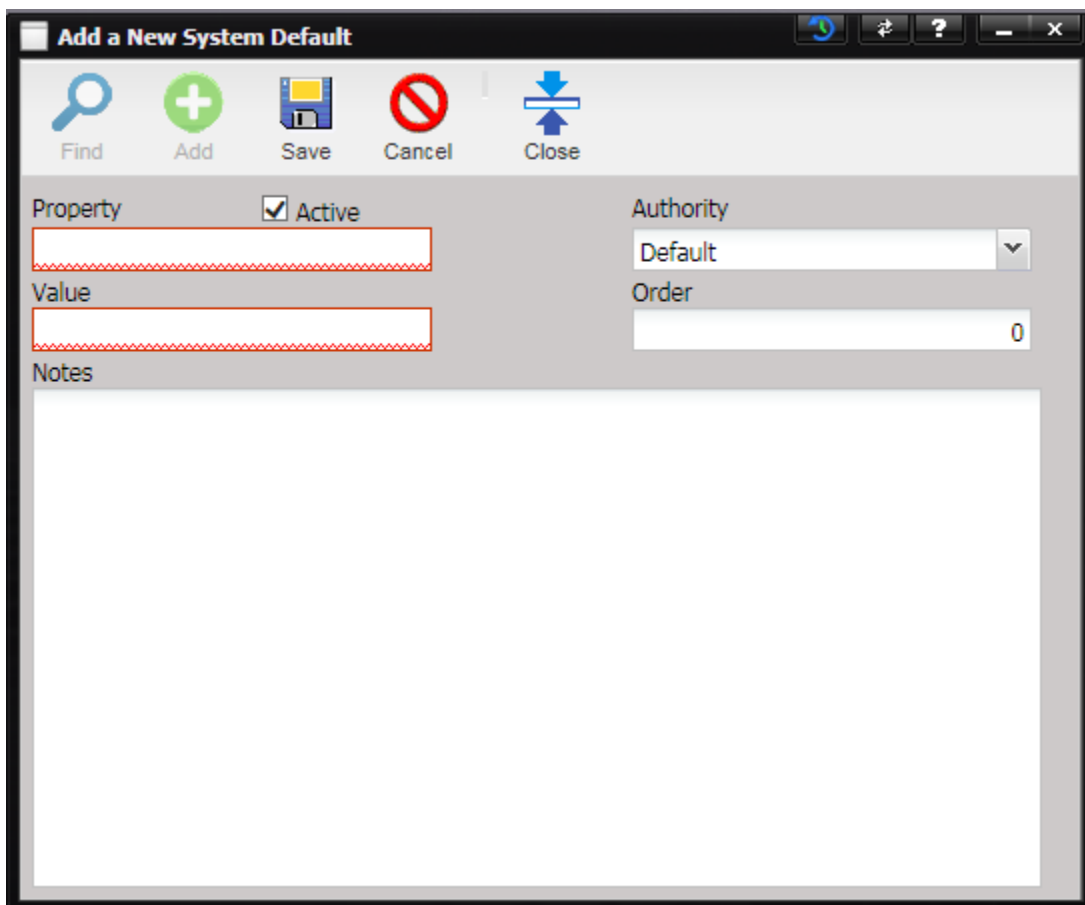
For example:

Currently, MET/TEAM uses two System Defaults to print two different reports from the Receiving Screen.



Ac...	Property	Value	Order	Authority	Comment
<input checked="" type="checkbox"/>	Quote	quote.rpt	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Recall	maintenancerecall.rpt	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Recall - Customer Portal	Recall Customer Portal.rpt	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Recall - No group	RecallNoGroup.rpt	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Receiving	ReceivedLog.rpt	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Receiving	Worksheet_UID.rpt	1.00	Default	AFFECT
<input type="checkbox"/>	Receiving - Allow Multiple Work Orders	0	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Receiving - Mobile = On Site	On Site	0.00	Default	AFFECT
<input checked="" type="checkbox"/>	Receiving - Priority	3	1.00	Default	AFFECT
<input checked="" type="checkbox"/>	Receiving - Priority	7	2.00	Default	AFFECT

If a third report was needed, select the “Add” button on the toolbar.
The Add a System Default screen is displayed.



Add a New System Default

Find Add Save Cancel Close

Property ☒ Active

Value

Authority Default

Order 0

Notes

- **Property** – The screen that the System Default applies to.
- **Active** – If checked, the System Default is active and being used by MET/TEAM.
- **Authority** – The authority indicator for this System Default.
- **Value** – The entry specified in the notes for this System Default.
Note: The Value field must be in English and if the Value is a number, the numbers must be formatted EN-US.
- **Order** – If “0” (zero), the parameter passed to the report is the parameter that is common to all work order that we just created in the receiving process. If order is greater than “0” (zero), nCallSheetUID is sent to the report. The report will show only data related to one work order record.
- **Notes** – Explains what the System Default does. In the System Default for Receiving when the Order is set to 1, the notes states: “AFFECTS: Receiving ACTION: If ‘Order’ <>0 then “Value” contains the name of any additional reports to be run during receiving.”

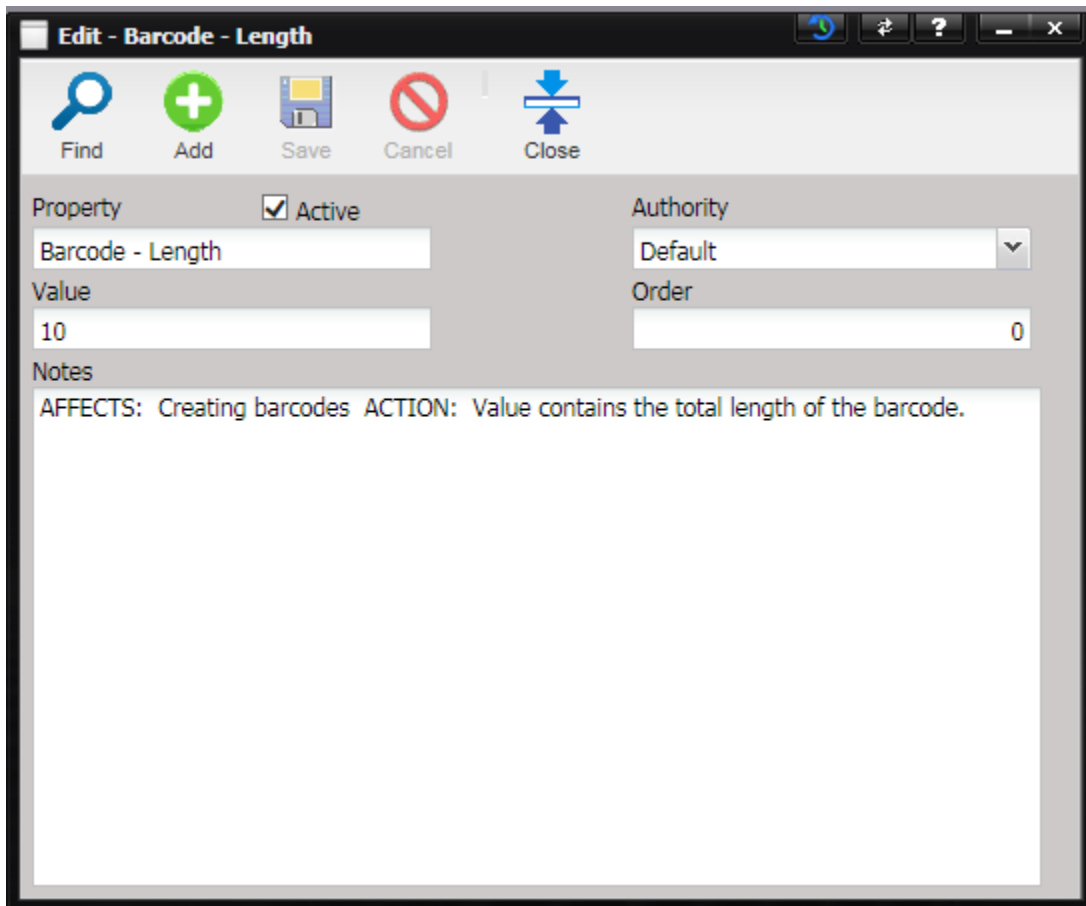
Modifying a System Default

To modify a System Default, select the System Default to be modified in the Find System Default screen and select OK.

Search Field	Starts With	Exact	Between	Search Value
Active	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Property	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Order	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Value	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Notes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Active	Property	Order	Value	Notes
<input checked="" type="checkbox"/>	Alerts.Email.FromAddress	0	metteam.beta@gmail.com	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Email.FromName	0	BETA Test Server Alertin...	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Language	0	EN	AFFECTS: Alerting ACTION: When active, Value contains the
<input checked="" type="checkbox"/>	Alerts.Smtp.Host	0	smtp.gmail.com	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Smtp.Password	0	MetTeamBeta123	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Smtp.Port	0	587	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Smtp.User	0	metteam.beta@gmail.com	AFFECTS: Alerting ACTION: When active Value contains the
<input checked="" type="checkbox"/>	Alerts.Smtp.UseSSL	0	true	AFFECTS: Alerting ACTION: When active Value contains eite
<input checked="" type="checkbox"/>	Barcode - Length	0	10	AFFECTS: Creating barcodes ACTION: Value contains the to

In this case, the Barcode –Length System Default is being edited. The Edit – Barcode – Length screen is displayed. (The edit screen is the same regardless of the System Default being edited.)



- **Property** – Name of the property.
Note: The Property Name should never be changed for the System Defaults that are part of the MET/TEAM software when purchased.
- **Active** – Turns on or off the functionality of the System Default. If checked, the System Default is enabled.
- **Authority** – The authority this default applies to. If an authority for the logged in Facility does not exist, the “System” authority is used.
- **Value** – Value of the property that determines the outcome of the selected System Default. Refer to the Notes for the System Default to determine valid Values.
- **Order** – If there is more than one System Default that reacts at the same time, the Order controls the sequence.
- **Notes** – A description of the system default and what part of the program it has an effect on.

Note: Modifications to system defaults may cause parts of the program to function incorrectly. Please refer to the [Systems Default Table](#) before modifying System Defaults.

Select the Save button to save any changes. Another System Default can be found by selecting the Find button. To close this screen, select the Close button.

System Defaults Table

Note: This is a listing of system defaults as of the publishing of this Help. System defaults and values are constantly being updated and changed.

Property	Value	Order	Notes
Administrative Cost Adjustment	0	0	AFFECTS: Returning ACTION: Value contains the multiplier used to adjust the cost for all work orders. If value = .1 and work order cost was 100, the new cost will be 110 (100*.1 = 10 added to the original 100). If value is negative then the total in the above example would be 90.
Asset - Use Receiving Screen	(none)	0	AFFECTS: Asset and Receiving - Specifies whether or not the Receiving screen is launched when using the Receive button on the Asset screen ACTION: If Active, clicking the Receive button on the Asset screen will cause the Receiving screen to be launched, with the source asset selected for receiving. If Inactive, clicking the Receive button on the Asset screen will receive the asset and open the created Work Order (legacy behavior). No data checks configured for the Receiving screen will be run.
Auditing	0	0	AFFECTS: Turns auditing on for 21 CFR Part 11. ACTION: When Active, Value determines how often the user is prompted to enter credentials when making changes to a record. - When Value is set to "0" - or any value other than "1" - (legacy mode), the user is prompted for credentials when saving changes. - When Value is set to "1", credential and reason prompts are suppressed when saving changes. When toggling this setting from Active to not Active, you must restart the website for the change to take full effect. Also, when this setting is Active, the User Name field defaults to blank/empty on the prompt for credentials when the Technician Signature or QC Signature button is clicked on a Work Order. When this setting is not Active, the current user's User Name is automatically populated.
Barcode - Length	10	0	AFFECTS: Creating barcodes ACTION: Value contains the total length of the barcode.
Barcode - Prefix	PRE	0	AFFECTS: Creating barcodes ACTION: When active, value contains the text value used at the beginning of all barcodes that will be created.
Barcode - Report	barcode.rpt	0	AFFECTS: Printing barcodes ACTION: Value contains the name of the report used to print a barcode sticker.
Barcode - Suffix	(none)	0	AFFECTS: Creating barcodes ACTION: When active, value contains the text value used at the end of all barcodes that will be created.
Billing	Invoice_Detail.rpt	0	AFFECTS: Printing invoices ACTION: Value contains the name of the report used to print an Invoice.

Billing - Create Detail	(none)	0	AFFECTS: Billing ACTION: If Active, Billing details from all associated charges are stored in the InvoiceItemDetails table. If Inactive, Billing details are not stored in the InvoiceItemDetails table.
Billing - Do not discount labor	0	0	AFFECTS: Billing, Returning ACTION: When active customer discounts do not apply to labor entered in MET/TEAM.
BusinessProcessed	CompletedWork.rpt	0	AFFECTS: Report run from the business status screen / completed work tab ACTION: Value contains the name of the report.
BusinessWIP	WIP.rpt	0	AFFECTS: Report run from the first tab (Open work orders) in Business Status ACTION: Value contains the name of the report.
Calendar	calendar.rpt	0	AFFECTS: Report run from the Calendar screen. ACTION: Value contains the name of the report.
Cert - Detailed Fee	10%	0	AFFECTS: Returning ACTION: When active, Value determines the fee added to the cost of a work order when the ISO check box is checked. If % is included in the value, then the fee is added as a percent of the labor costs. Otherwise the value is added directly to the work order cost.
Cert - Detailed Fee Minimum	20	0	AFFECTS: Returning ACTION: When active, Value determines the minimum fee added to the cost of a work order when the ISO check box is checked.
Cert - Logo Visible	N/A	0	AFFECTS: Certificate printing.
Change Tracking	-1	0	AFFECTS: When active, changes to most database tables are tracked, keeping complete history. Must be active along with Auditing for 21CFR Part 11 compliance.
Company Name	[Your Company Name Goes Here]	1	AFFECTS: Reports ACTION: Can be used in a report to display the company name, by including the view ver_8_config_vw.
Create TPD linkage from MET/CAL	(none)	0	AFFECTS: Creating TypeProcedureDefault records from MET/CAL ACTION: When Active, MET/CAL is allowed to link a .PXE procedure that was selected from the file system to the Type record of the DUT that is being calibrated. MET/CAL always uploads the selected .PXE procedure file to the database if it does not already exist and creates a Procedure record for it, but linking the Procedure record to the Type is controlled by this setting.
DepartmentBypass	Bypass	0	AFFECTS: Assets and Parent Asset ACTION: When this is marked active, Departments don't have to be children facilities of the Customer facility. Any 'Customer' facility can be selected as a department. When inactive, Departments, on the asset, can only be selected when they are configured as children facilities of the Asset's customer facility. The department facility record must also have customer check box selected.

Download config files from database on startup	(none)	0	AFFECTS: MET/CAL workstation configuration files ACTION: When Active, the workstation configuration files metcal.ini and config.dat will be downloaded from the database to the workstation on startup, overwriting the local copies of these files.
Facility - Inventory	Inventory.rpt	0	AFFECTS: Printing inventory report. ACTION: Value contains the name of the report used to print an inventory report from the facilities screen
HelpWebsite	https://support.flukecal.com	0	AFFECTS: Website on Help menu ACTION: Opens the default web browser to the address in Value.
Ignore time on In Calibration check	(none)	0	AFFECTS: Checking if an asset is in cal from MET/CAL ACTION: When Active, MET/CAL will ignore the time component of the calibration due date, when determining if an asset is in cal.
Import - Data Directory	[set during installation]	0	AFFECTS: File Import ACTION: Value contains the shared server folder repository for data (files) to be imported.
Import - Files Directory	[set during installation]	1	AFFECTS: File Import ACTION: Value contains the shared server folder repository for certs and other files to be imported. NOTE: It is recommended to use a UNC path that is accessible to users that need to import files.
Invoice - Length	10	0	AFFECTS: Creating Invoice numbers ACTION: Value contains the total length of the Invoice number.
Invoice - Prefix	Annual	0	AFFECTS: Creating Invoice numbers ACTION: When active, value contains the text value used at the beginning of all Invoice numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Invoice - Suffix	(none)	0	AFFECTS: Creating Invoice numbers ACTION: When active, value contains the text value used at the end of all Invoice numbers that will be created.
Labor - MET/CAL	1	0	AFFECTS: Work Order Labor, determines if labor is automatically added to a work order from MET/CAL Procedure runs. ACTION: When Active and the value = 1, the labor is added to the work order automatically with "No Charge" checked and the Category set to MET/CAL. When Active and the value = 2, the labor is added to the work order automatically with "No Charge" unchecked and the Category set to MET/CAL. When Inactive, the labor is not added.
Licenses - Track Usage	(none)	0	AFFECTS: License usage logging. ACTION: When Active, any action that reserves or releases a license (Login, Logoff, Mobile Check Out, Mobile Check In, etc.) triggers a set of records, one for each license type (i.e. MET/TEAM, Customer Portal, MET/CAL, etc.), to be written to the LicenseUsageHistory table indicating the in-use count and the total count for each license type.

			When Inactive (the default state), no records are written to the LicenseUsageHistory table. NOTE: After activating this setting, use the Custom Report LicenseUsage.rpt to view license usage information. This setting should remain active only when analyzing license usage. After deactivating this setting, you may use the Data Cleanup tool to purge records from this table.
Login - Use Windows Authentication	(none)	0	AFFECTS: Login ACTION: When Active is not checked, users log in to MET/TEAM and Customer Portal using their MET/TEAM username and password. For Windows Authentication, check Active and: Set Value = 1 - MET/TEAM uses Windows Authentication and Customer Portal uses MET/TEAM Login Set Value = 2 - Both MET/TEAM and Customer Portal use Windows Authentication For SAML2 Authentication, check Active and: Set Value = 3 - MET/TEAM uses SAML2 Authentication and Customer Portal uses MET/TEAM Login Set Value = 4 - Both MET/TEAM and Customer Portal use SAML2 Authentication When Active and any other Value is entered, both MET/TEAM and Customer Portal use MET/TEAM Login. ATTENTION: If you have activated this System Default, you must set up a user account that matches your domain username (Value = 1 or 2) or SAML2 credentials (Value = 3 or 4) and verify it has administrative rights. Failure to do so may result in being locked out of MET/TEAM! NOTE: Refer to MET/TEAM help for more information on configuring IIS and MET/TEAM and Customer Portal to support Windows Authentication or SAML2 Authentication.
Manual Template	ManualTemplateFields.rpt	0	AFFECTS: Manual Template ACTION: If 'Order' = 0 then 'Value' contains the name of the report to be run from the Print button on the Manual Template screen.
Manual Template - Default Data Condition	1	0	AFFECTS: Manual Templates, determines the default data condition when adding a manual template calibration to a Work Order. ACTION: When Active and the value = 1, the default "first result" data condition is set to "As Found". When Active and the value = 2, the default "first result" data condition is set to "Found / Left". When Inactive, the default "first result" data condition is set to "As Found".
Parts Negative Inventory	Yes	0	AFFECTS: Using parts on a work order when new on hand level will be negative. ACTION: If Value contains 'Ask' then the user is asked to update the value to a negative number. If 'Yes' the negative number is used. If 'No' 0 is saved as the on hand value. If Value = 'Yes' or 'No' then the user is not asked but the functionality described above occurs.

Pricing report	Pricing.rpt	0	AFFECTS: Contract Pricing ACTION: Value contains name of the report printed from the screen.
Problem Report - Length	12	0	AFFECTS: Creating Problem Report numbers ACTION: Value contains the total length of the Problem Report number.
Problem Report - Prefix	Annual	0	AFFECTS: Creating Problem Report numbers ACTION: When active, value contains the text value used at the beginning of all Problem Report numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Problem Report - Report	ProblemReportNew.rpt	0	AFFECTS: Problem Report ACTION: When active, the report name in the Value field is used to produce the report printed from the Problem Report screen. The default values is ProblemReportNew.rpt.
Problem Report - Suffix	(none)	0	AFFECTS: Creating Problem Report numbers ACTION: When active value contains the text value used at the end of all Problem Reports that will be created.
Quote	quote.rpt	0	AFFECTS: Printing Quotes ACTION: Value contains the name of the report used to print quotes.
Quote - Length	10	0	AFFECTS: Quoting ACTION: Value contains the total length of the Quote number.
Quote - Prefix	Annual	0	AFFECTS: Quoting ACTION: When active, value contains the text value used at the beginning of all Quote numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Quote - Suffix	(none)	0	AFFECTS: Quoting ACTION: When active, value contains the text value used at the end of all Quote numbers that will be created.
Recall	maintenancerecall.rpt	0	AFFECTS: Recall printing ACTION: Value contains the name of the report used to print when 'Do not Group by Customer' is unchecked.
Recall - Customer Portal	Recall Customer Portal.rpt	0	AFFECTS: Recall printing in customer portal ACTION: Value contains the name of the report used to print Recall or Delinquent reports via customer portal.
Recall - No group	RecallNoGroup.rpt	0	AFFECTS: Recall printing ACTION: Value contains the name of the report used to print when 'Do not Group by Customer' is checked.
Receiving	ReceivedLog.rpt	0	AFFECTS: Receiving ACTION: If 'Order' = 0 then 'Value' contains the name of the summary report run during receiving. If 'Order' <> 0 then 'Value' contains the name of any additional reports to be run during receiving.
Receiving	Worksheet_UID.rpt	1	AFFECTS: Receiving ACTION: If 'Order' = 0 then 'Value' contains the name of the summary report run during receiving. If 'Order' <> 0 then 'Value' contains the name of any additional reports to be run during receiving.

Receiving - Allow Multiple Work Orders	0	0	AFFECTS: Receiving ACTION: Allows multiple work orders to be opened at the same time against the same asset in the same lab. VALUE: Does NOT affect functionality.
Receiving - Priority	3	1	AFFECTS: Receiving ACTION: Sets the RDD. When the ORDER value matches the Priority in the receiving screen then the VALUE is added to the received date to calculate the RDD.
Receiving - Priority	7	2	AFFECTS: Receiving ACTION: Sets the RDD. When the ORDER value matches the Priority in the receiving screen then the VALUE is added to the received date to calculate the RDD.
Receiving - Priority	14	3	AFFECTS: Receiving ACTION: Sets the RDD. When the ORDER value matches the Priority in the receiving screen then the VALUE is added to the received date to calculate the RDD.
Receiving - Priority Default	3	0	AFFECTS: Receiving ACTION: When active, value contains the default priority used when receiving assets in MET/TEAM. If no corresponding Priority record is created then no RDD calculations will be done.
Receiving - Set Interval	Asset	0	AFFECTS: Receiving, work orders ACTION: If active, and value = 'Asset' when creating a new work order, MET/TEAM will use the interval from the asset's scheduled services with a matching service type. If active, and value = 'Type', MET/TEAM will use the interval data from the default or top procedure configured for the asset's type with a matching service. If Inactive, MET/TEAM will leave the Interval blank.
Receiving - Set Notes	Type	0	AFFECTS: Receiving, work orders ACTION: If active, when creating a new 'calibration' type of work order, MET/TEAM will set the Accuracy and Uncertainty notes based on the system default's 'Value'. 'Asset' will use the data from the asset, 'Type' will use the Accuracy and Uncertainty notes from asset's type. If inactive, MET/TEAM will leave the Accuracy and Uncertainty notes blank on the Work Order.
Receiving - Show Receiving Notes	0	0	AFFECTS: Receiving ACTION: When active the receiving process will display to the user, any receiving notes for the related type in the Receiving Notes field.
Report String 1	[report substitution mt_user1]	2	AFFECTS: Reports ACTION: Can be used in a report to display a generic string, by including the view ver_8_config_vw.
Report String 2	[report substitution mt_user2]	3	AFFECTS: Reports ACTION: Can be used in a report to display a generic string, by including the view ver_8_config_vw.
Report String 3	[report substitution mt_user3]	4	AFFECTS: Reports ACTION: Can be used in a report to display a generic string, by including the view ver_8_config_vw.

Report String 4	[report substitution mt_user4]	5	AFFECTS: Reports ACTION: Can be used in a report to display a generic string, by including the view ver_8_config_vw.
Report String 5	[report substitution mt_user5]	6	AFFECTS: Reports ACTION: Can be used in a report to display a generic string, by including the view ver_8_config_vw.
Reports - Customer Portal reports directory	[set during installation]	0	AFFECTS: Customer Portal reports ACTION: If active, Value contains the default path to the Customer Portal reports directory. NOTE: It is recommended to use a local path on the server such as C:\inetpub\wwwroot\CustomerPortal\Reporting\Customer Portal\. If active the last character should be a \.
Reports - Customer Portal system directory	[set during installation]	0	AFFECTS: Customer Portal system reports ACTION: If active, Value contains the default path to the Customer Portal system reports directory. NOTE: It is recommended to use a local path on the server such as C:\inetpub\wwwroot\Customer Portal\Reporting\System\. If active the last character should be a \.
Reports - Default Reports directory	[set during installation]	0	AFFECTS: Alerting using custom reports ACTION: If active, Value contains the default path to the custom reports directory. If inactive Alerting will not function correctly. NOTE: It is recommended to use a local path on the server such as C:\inetpub\wwwroot\metteam\Reporting\Reports\. If active the last character should be a \.
Reports - Default System directory	[set during installation]	0	AFFECTS: Alerting using system reports ACTION: If active, Value contains the default path to the system reports directory. If inactive Alerting will not function correctly. NOTE: It is recommended to use a local path on the server such as C:\inetpub\wwwroot\metteam\Reporting\System\. If active the last character should be a \.
Returning	PackingSlip.rpt	0	AFFECTS: Returning ACTION: If 'Order' = 0 then 'Value' contains the name of the summary report run during returning. If 'Order' <> 0 then 'Value' contains the name of any additional reports to be run during returning.
Returning	Worksheet_UID.rpt	1	AFFECTS: Returning ACTION: If 'Order' = 0 then 'Value' contains the name of the summary report run during returning. If 'Order' <> 0 then 'Value' contains the name of any additional reports to be run during returning.
Returning - Update notes	N	0	AFFECTS: work orders ACTION: When active, Value contains the key to indicate which asset notes are automatically updated when the work order is complete. Valid values are: A - Accuracy notes are copied from the work order to the asset U - Uncertainty notes are copied from the work order to the asset B - Both Accuracy and Uncertainty notes are copied to the asset N - Neither of the notes is copied

			to the asset NOTE : Marking this default inactive causes the 'N' value to be in effect.
Shipping - Length	10	0	AFFECTS: Creating Shipment Numbers ACTION: Value contains the total length of the Shipment Number.
Shipping - Prefix	Annual	0	AFFECTS: Creating Shipment Numbers ACTION: When active, value contains the text value used at the beginning of all Shipment Numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Shipping - Suffix	(none)	0	AFFECTS: Creating Shipment Numbers ACTION: When active, value contains the text value used at the end of all Shipment Numbers that will be created.
Shipping Report	shipping.rpt	0	AFFECTS: Shipping ACTION: When active value contains the report printed from the shipping screen. The default value is 'dd1149.rpt'.
Technician Work	TechWork.rpt	0	AFFECTS: My Work ACTION: When active, value contains name of the report printed when the Tech Work button is pressed.
TimeCard	Timekeeping.rpt	0	AFFECTS: My Work ACTION: When active, value contains name of the report printed when the Print button is pressed.
Tool Assignment - Length	12	0	AFFECTS: Creating Tool Assignment numbers ACTION: Value contains the total length of the Tool Assignment number.
Tool Assignment - Prefix	Annual	0	AFFECTS: Creating Tool Assignment numbers ACTION: When active, value contains the text value used at the beginning of all Tool Assignment numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Tool Assignment - Suffix	(none)	0	AFFECTS: Creating Tool Assignment numbers ACTION: When active, value contains the text value used at the end of all Tool Assignment numbers that will be created.
ToolRoomReport	ToolRoom.rpt	0	AFFECTS: Report run from the Tool Assignment screen. ACTION: Value contains the name of the report.
Uncert Coverage Factor	2.00000000	7	AFFECTS: MET/CAL Uncertainty ACTION: The coverage factor K is used to calculate the Expanded Uncertainty from the Standard Uncertainty, via multiplication: $exp = K * std$. The coverage factor (cov_fac) can be set directly from a procedure, via MET/CAL Configuration, or via this system default (in this order). If the Welch-Satterthwaite flag is set through a procedure, the coverage factor is calculated rather than read from this system default. When the system default is inactive, the default coverage factor of 2.0 is used. This system default does not apply to Manual Templates (the expanded uncertainty is entered directly).

Uncert Num Meas	0	8	AFFECTS: MET/CAL Uncertainty ACTION: The number of readings per point (nmeas) can be set directly in a procedure, via MET/CAL Configuration, or via this system default (in this order). When the system default is not active, no readings are taken. This system default does not apply to Manual Templates.
Uncert Sign Digits	2	9	AFFECTS: Manual Templates and MET/CAL results ACTION: If active, Value indicates the number of significant digits to use when formatting uncertainty values on Manual Template results and MET/CAL results. If inactive, uncertainty values are displayed without any formatting.
Use Student T	N	10	AFFECTS: MET/CAL Uncertainty ACTION: The Student's t Distribution can be considered a special case of the normal distribution for small sets, typically having less than 100 members. If the system default is active and the value is Y, the Student's t Distribution is used to determine the F parameter used in the uncertainty calculation in MET/CAL. The use of the Student's t Distribution (use_st) can be set directly in a procedure, via MET/CAL Configuration or via this system default (in this order). When the system default is not active or the value is N, the F parameter used is 1.0 (i.e. disabled). This system default does not apply to Manual Templates.
VAT	1.5	0	AFFECTS: Billing ACTION: Percentage of Value Added Tax that will be charged on all transactions.
Work Order - Cert Creation	3	0	AFFECTS: Returning - Specifies whether or not a .pdf or .xls file of the cert is created when a Work Order is returned. ACTION: If Active and the value is empty or (none), neither a .pdf nor .xls file are created. If Active and the value = 1, a .pdf of the current information is created, this .pdf is added to the Files tab on the Work Order, and marked as "Current Cert". If Active and the value = 2, a .xls of the current information is created, this .xls is added to the Files tab on the Work Order, and marked as "Current Cert". If Active and the value = 3, both a .pdf and a .xls of the current information are created, these files are added to the Files tab on the Work Order, and marked as "Current Cert".
Work Order - Clear QC Approval	(none)	0	AFFECTS: Work Orders, clearing QC Approved By and QC Approved Date fields whenever a work order is edited by a user that is not currently the QC Approved By user. ACTION: When Active (the default state), if the Work Order has QC Approved By and/or QC Approved Date fields filled in and the work order is edited by a different user, then the QC Approved By and QC Approved Date fields will be cleared. When Inactive, the QC Approved By and QC Approved Date fields are not changed.

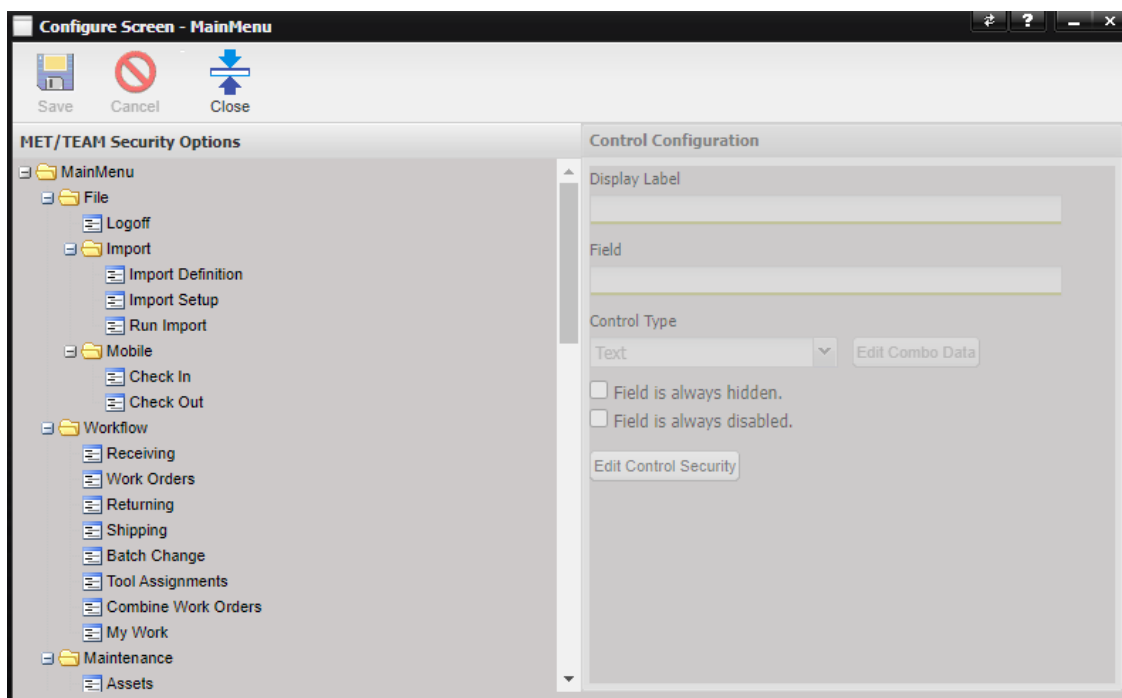
Work Order - Edit Calibration Points	(none)	0	AFFECTS: Work Order ACTION: If Active, the Work Order calibration points are editable from the Work Order View Results screen. Value is not applicable. Order is not applicable.
Work Order - Edit Status	0	0	AFFECTS: Work Orders ACTION: If active, the Status is editable and is a dropdown. If inactive, the Status is read only and is filled with the Blue read only color. When inactive and the Work Order has not been returned and 'closed', the Status is changed by adding a Log Note.
Work Order - Enable COMPASS Data File Import	(none)	0	AFFECTS: COMPASS Data File Import ACTION: If active, work order results tab shows COMPASS button which allows for importing COMPASS data files into the current work order. Value is not applicable. Order is not applicable. NOTE: The temporary directory used is the same as used for imports, defined in the Import - Data Directory system default.
Work Order - Forward Trace Report	ttrace.rpt	0	AFFECTS: Work Orders ACTION: When active value contains the report printed from the forward trace button on the work order screen. The default value is 'ttrace.rpt'.
Work Order - Length	10	0	AFFECTS: Creating Work Order Numbers ACTION: Value contains the total length of the Work Order Number.
Work Order - MET/CAL Work Order Creation	0	0	AFFECTS: Work Orders and MET/CAL Interaction ACTION: When Active: If there is not a Work Order open for the Asset, create a new Work Order. If there is only one Work Order open for the Asset and the System Default Receiving – Allow Multiple Works Orders is active, the user is prompted asking if a new Work Order should be created or the existing Work Order should be used. - Yes - the calibration results are appended to the existing Work Order. - No - a new Work Order is created. - Cancel - the calibration process is aborted. If there is only one Work Order open for the Asset and the System Default Receiving – Allow Multiple Works Orders is not active, use the existing Work Order. If there is more than one Work Order open for the Asset and the System Default Receiving – Allow Multiple Works Orders is active, create a new Work Order. If there is more than one Work Order open for the Asset and the System Default Receiving – Allow Multiple Works Orders is not active, exit. When Not Active: If there is not a Work Order open for the Asset, prompt the user to receive the Asset prior to performing a calibration and exit. If there is only one Work Order open for the Asset, use the existing Work Order appending the data. If there is more than one Work Order open for the Asset, the user is prompted to select the Work Order to use.
Work Order - Prefix	Annual	0	AFFECTS: Creating Work Order Numbers ACTION: When active, value contains the text value used at the

			beginning of all Work Order Numbers that will be created. If value contains 'Annual' the prefix will be the four digit year and the count value will reset to 1 at the beginning of each year.
Work Order - Reverse Trace Report	ttrace.rpt	0	AFFECTS: Work Orders ACTION: When active value contains the report printed from the reverse trace button on the work order screen. The default value is 'ttrace.rpt'.
Work Order - Revision Suffix	-Rev{0}	0	AFFECTS: Unlocked Work Orders ACTION: If active, the Value entered is the revision suffix that is appended to the Work Order Certificate Number when a closed Work Order is unlocked, modified, and then saved. The default suffix is -Rev{0} where the {0} represents the revision number that is incremented with each unlock. To maintain the uniqueness of the Work Order Certificate Number and .pdf file created, you must include {0} in the suffix.
Work Order - Revision Tracking	1	0	AFFECTS: Unlocked Work Orders ACTION: If active, the value from the Work Order - Revision Suffix System Default is appended to the certificate number. If active and the Value is 0, no .pdf file of the current revision of the certificate is created. If active and the Value is 0a, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. No .pdf file of the current revision of the certificate is created. If active and the Value is 1, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, and marked as Private. If active and the Value is 1a, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. If Yes is selected on the message, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, and marked as Private. If No is selected on the message, no .pdf file of the current revision of the certificate is created. If active and the Value is 2, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, but is not marked as Private. If active and the Value is 2a, the user is asked whether or not to append the Work Order - Revision Suffix to the certificate number. If Yes is selected on the message, a .pdf file of the current revision of the certificate is created and added to the Files section on the Labor/Files tab of the Work Order, but is not marked as Private. If No is selected on the message, no .pdf file of the current revision of the certificate is created. If inactive, automatic revision tracking is disabled.

Work Order - Suffix	(none)	0	AFFECTS: Creating Work Order Numbers ACTION: When active, value contains the text value used at the end of all Work Order Numbers that will be created.
Work Order – Temperature and Humidity Data	\\server\share\folder\RH T.INI	0	AFFECTS: Work Orders and MET/CAL Interaction ACTION: When Active: The Value field must be a valid path and file name to the MET/CAL RHT.INI file which contains ambient condition data. Value can be a local path or a UNC path. This file is queried when the ambient conditions button on the Work Order screen is clicked. When Inactive: The Value field is ignored. The ambient conditions button on the Work Order screen is disabled.
Work Order - Use Multiple Procedures	(none)	0	AFFECTS: Work Orders ACTION: If active, different procedures can be selected and used in the calibration process other than the Procedure Used on the Service Tab of the Work Order. If inactive, only the Procedure Used on the Service tab can be used in the calibration process. Value is not applicable. Order is not applicable.
Work Order Report	Worksheet_UID.rpt	0	AFFECTS: work orders ACTION: When active value contains the report printed from the print button on the work order screen. The default value is 'Worksheet_UID.rpt'.

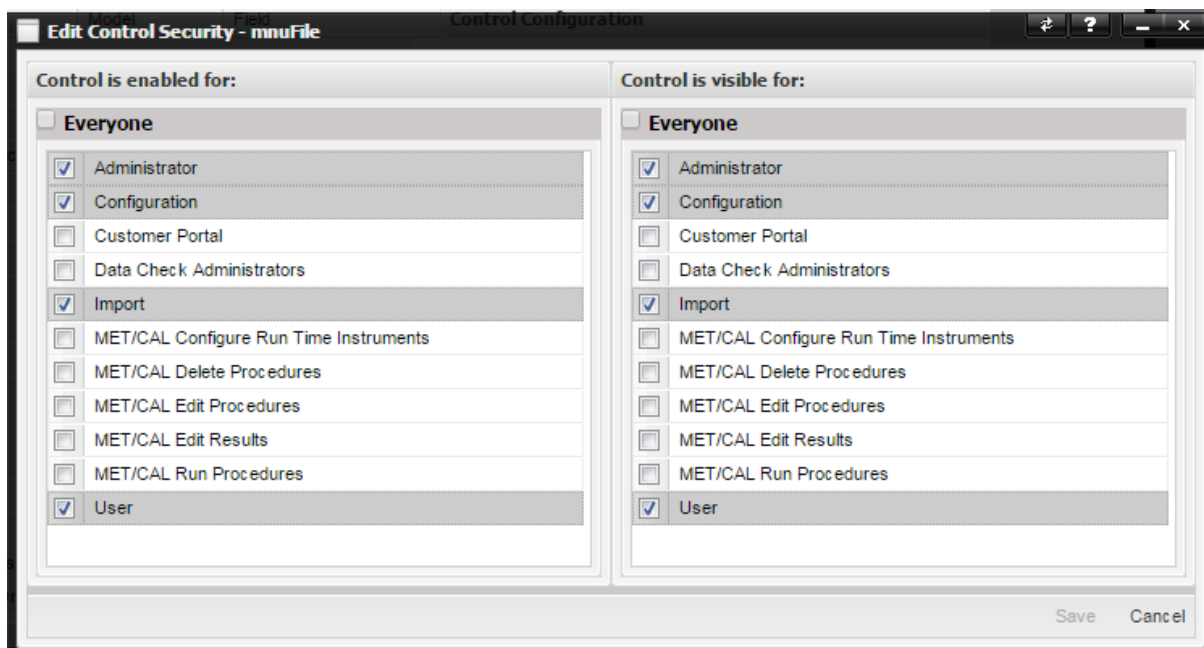
Menu Security

The Menu Security option is for customizing which features are available for members of each Security Group.



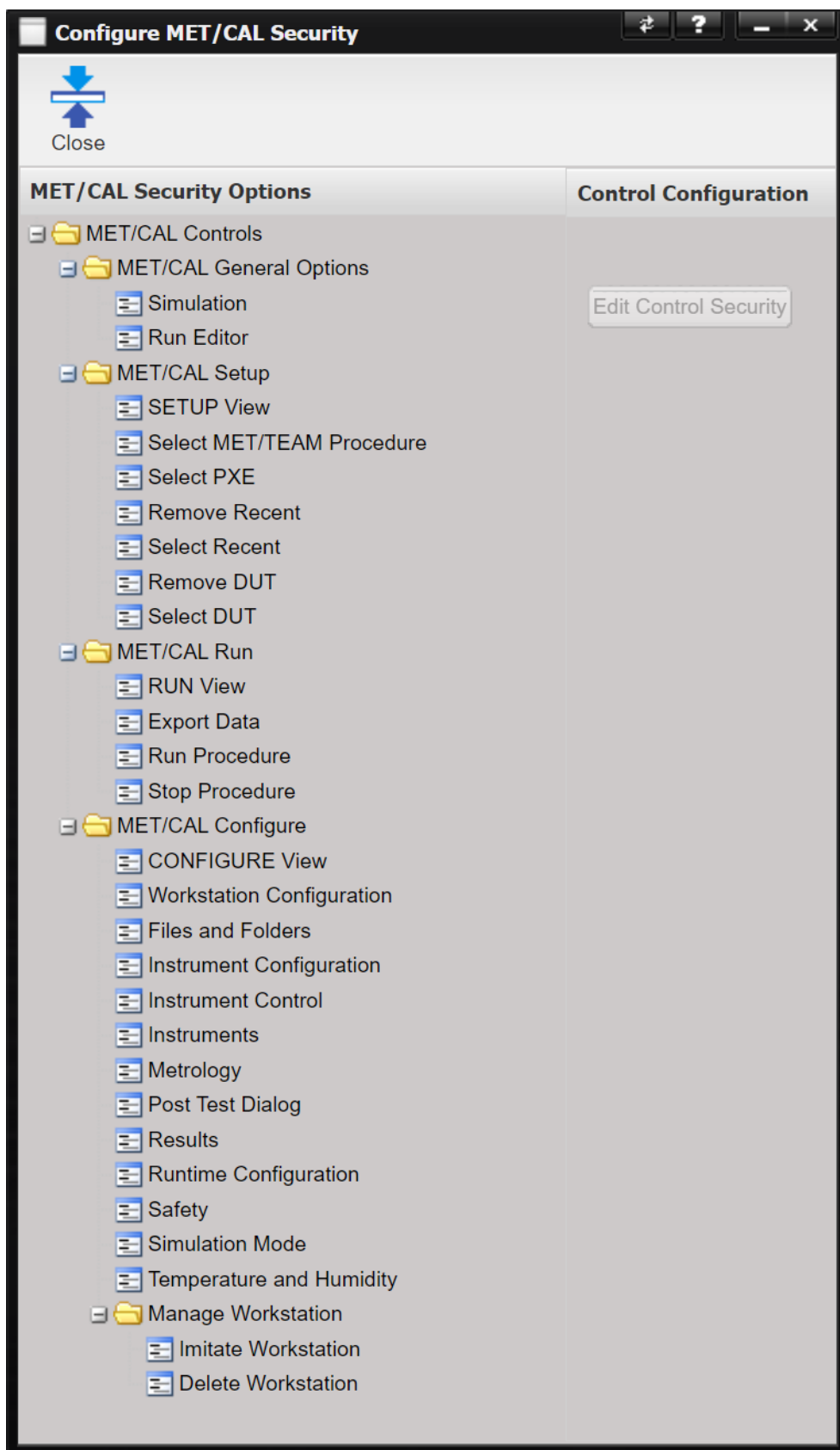
- **Field is always Hidden** – If checked, the menu item is not visible.
- **Field is always disabled** – If checked, the menu item is visible but is disabled and cannot be used.

To change access to a specific menu item, select the item and click the Edit Control Security button to display the Edit Control Security dialog, and select which groups the control is enabled and/or visible for.



MET/CAL Security

The MET/CAL Security option is for customizing the availability of MET/CAL features for members of each Security Group.



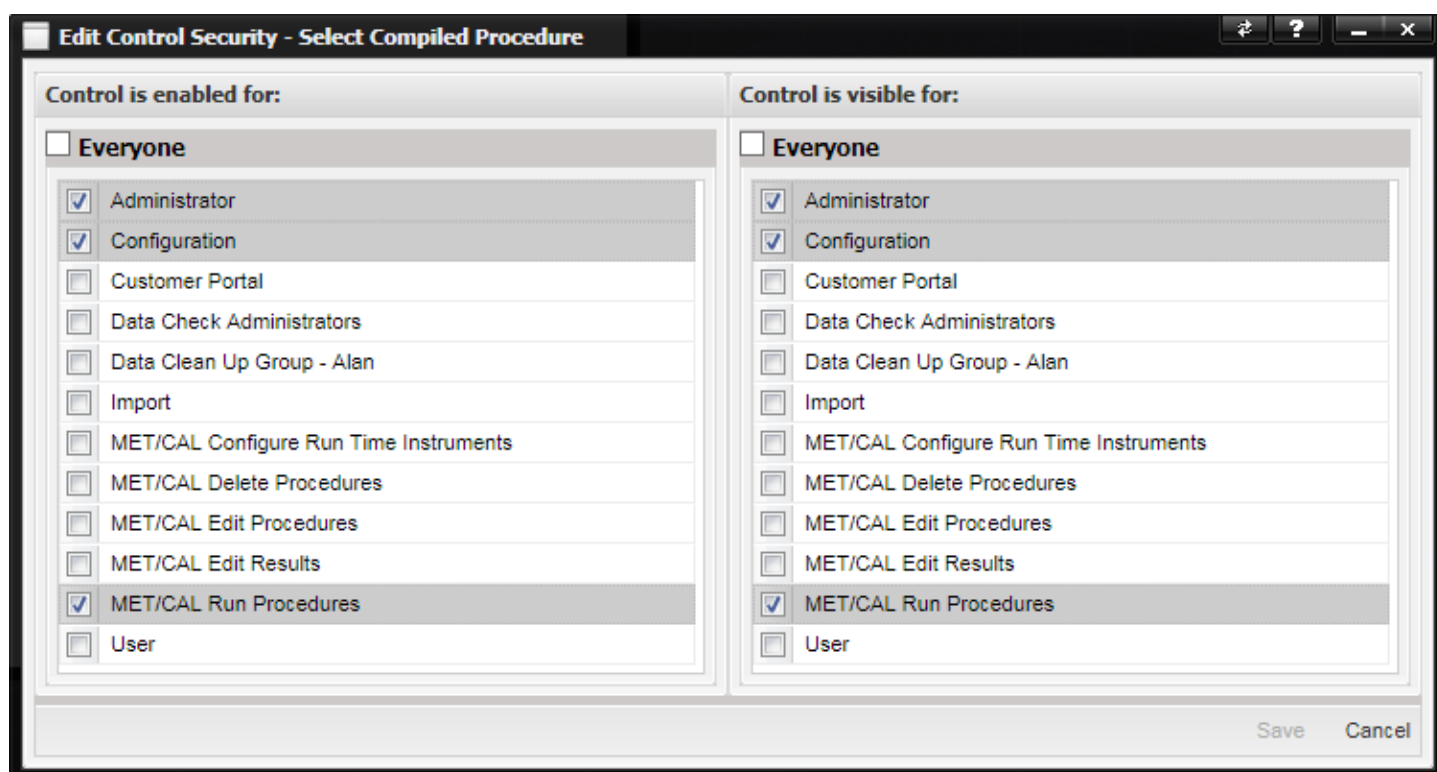
To change the Security Groups that have access to MET/CAL features, select the feature from the list on the left and then click the Edit Control Security button. The Edit Control Security dialog is displayed for selecting which [Security Groups](#) the feature is enabled and/or visible for when running MET/CAL applications.

To set visibility and enabled/disabled state of the entire SETUP view in the MET/CAL Runtime application, select the SETUP View item under the MET/CAL Setup node. The features listed under the MET/CAL Setup node represent the controls on the SETUP view.

To set visibility and enabled/disabled state of the entire RUN view in the MET/CAL Runtime application, select the RUN View item under the MET/CAL Run node. The features listed under the MET/CAL Run node represent the controls on the RUN view.

To set visibility and enabled/disabled state of the entire CONFIGURE view in the MET/CAL Runtime application, select the CONFIGURE View item under the MET/CAL Configure node. The features listed under the MET/CAL Configure node represent the pages available on the CONFIGURE view in the MET/CAL Runtime application and the Tools > MET/CAL Configuration settings in the MET/CAL Editor application (as applicable).

Note: Security settings only apply to features that are represented by the blue and white icon. If a folder node is selected, the Edit Control Security button is disabled.



MET/CAL Prompts

Use this option to configure prompts for the MET/CAL Runtime. Prompts allow the technician to update fields on the Asset, Work Order, and/or Work Order Results page during a procedure run. There are three types of prompts:

- Pre Prompt – Shown at the beginning of procedure execution
- Pass Prompt – Shown at the end of procedure execution if all results passed
- Fail Prompt – Shown at the end of procedure execution if any result failed

Prompts without any fields defined indicate that MET/CAL should show the full Work Order page. Prompts are selected in the MET/CAL Runtime's Configuration settings.

Edit Prompt - Default

Find Copy Add Delete Save Cancel Close

Prompt Name: Default

Prompt Type: Pre Prompt

☒ Active

Notes: Default Pre Prompt

Database Field	Variable	Required	Read Only	Make Blank	
CallSheets.cTemperature	TEMP\$	No	No	Yes	
CallSheets.cHumidity	RH\$	No	No	Yes	
CallSheetEx.lField4	SEAL\$	No	No	Yes	
CallSheetEx.cField2	WO\$	No	No	No	

CallSheetEx.cField2
CallSheets.lOptional1
CallSheets.lOptional2
CallSheets.mCallSheetNotes
CallSheets.mAccuracyNotes
CallSheets.mUncertaintyNotes
CallSheets.mSubContractorNotes
CallSheets.mOOTNotes
CallSheets.mStickerNotes
CallSheetEx.cField1
CallSheetEx.cField2
CallSheetEx.cField3
CallSheetEx.cField4
CallSheetEx.cField5
CallSheetEx.cField6
CallSheetEx.cField7

- **Prompt Name** – Name of the prompt. This is the name by which MET/CAL will refer to this prompt.
- **Prompt Type** – Type of prompt. This indicates when the prompt is intended to be displayed.
- **Notes** – Enter any additional information about this prompt in the Notes field.
- **Active** – Determines whether this prompt can be selected and used by MET/CAL Runtime. If unchecked, this prompt cannot be seen or used.

To add, delete, and arrange rows in the grid, right-click anywhere in the grid area and select the desired menu item.

Add Row
Remove Row
Remove All
Move item up
Move item down

When adding a row, a blank row is added to the grid. Populate each the cell for each row:

- **Database Field** – Use the drop-down list in this cell to select the database field to include on the prompt. See the table below for a list of available fields.
- **Variable** – (Optional) Enter the name of the MET/CAL variable that should be linked to this field. Variable names must be in all caps and end with \$ (i.e. TEMP\$ or ONSITE\$).
- **Required** – Checking this cell indicates the field will be required to have a value before the prompt can be saved. This option may be disabled for certain fields and Prompt Types.
- **Read Only** – Checking this cell indicates the field will not be editable on the prompt. This option may be disabled for certain fields and Prompt Types.
- **Make Blank** – Checking this cell indicates the field will initially be blank/unchecked on the prompt. This option is disabled and set to No for logical and numeric fields.

***Note:** When the selected Database Field is from the CallSheetResults table, the Read Only option will be forced to unchecked and the Make Blank option will be forced to checked and the value entered on the prompt will apply to all results on the Work Order.*

When configuring a prompt, the information in the tables below indicate where the initial value for a field will come from when the prompt is displayed, based on some of the settings for that field:

For Pre Prompts:

Has Variable	Read Only	Make Blank	Initial Field Value
No	Unchecked	Unchecked	From Database
Yes	Unchecked	Unchecked	From Variable
No	Checked	Unchecked	From Database
No	Unchecked	Checked	<blank>
Yes	Checked	Unchecked	From Database
Yes	Unchecked	Checked	<blank>

For Pass/Fail Prompts:

Has Variable	Read Only	Make Blank	Initial Field Value
No	Unchecked	Unchecked	From Database
Yes	Unchecked	Unchecked	From Variable
No	Checked	Unchecked	From Database
No	Unchecked	Checked	<blank>
Yes	Checked	Unchecked	From Variable
Yes	Unchecked	Checked	<blank>

The following Database Fields can be selected:

CallSheets Table

CallSheets.nDepartmentUID	CallSheets.cCertFormat
CallSheets.nWorkingFacilityUID	CallSheets.cWorkOrderResults
CallSheets.nOwningLabUID	CallSheets.tOpenDate
CallSheets.nCategoryUID	CallSheets.tRequiredDate
CallSheets.nSubCategoryUID	CallSheets.tDelayDate
CallSheets.nAssignedTechUID	CallSheets.tMaintDate
CallSheets.nTechnicianUID	CallSheets.tMaintNextDate
CallSheets.nSubContractorUID	CallSheets.tReturnedDate
CallSheets.nJobNumberUID	CallSheets.nQuantity
CallSheets.nSubContHours	CallSheets.nPriority
CallSheets.nSubContCost	CallSheets.lExpedite
CallSheets.nSubContLabCost	CallSheets.lISOCert
CallSheets.nAllocated	CallSheets.lOnSite
CallSheets.cContactInfo	CallSheets.lReturnNoMaint
CallSheets.cInitialCondition	CallSheets.lSubContracted
CallSheets.cServiceReason	CallSheets.lOOT
CallSheets.cArea	CallSheets.lDelayed
CallSheets.cStickerType	CallSheets.lCancelled
CallSheets.cCallSheetStatus	CallSheets.lOptional1
CallSheets.cCertificationNumber	CallSheets.lOptional2
CallSheets.cInterval	CallSheets.mCallSheetNotes
CallSheets.cIntervalUOM	CallSheets.mAccuracyNotes
CallSheets.cTemperature	CallSheets.mUncertaintyNotes
CallSheets.cHumidity	CallSheets.mSubContractorNotes
CallSheets.cPressure	CallSheets.mOOTNotes
CallSheets.cLocation	CallSheets.mStickerNotes

CallSheetEx Table

CallSheetEx.cField1	CallSheetEx.nField7
CallSheetEx.cField2	CallSheetEx.nField8
CallSheetEx.cField3	CallSheetEx.nField9
CallSheetEx.cField4	CallSheetEx.nField10
CallSheetEx.cField5	CallSheetEx.nField11
CallSheetEx.cField6	CallSheetEx.nField12
CallSheetEx.cField7	CallSheetEx.nField13
CallSheetEx.cField8	CallSheetEx.nField14
CallSheetEx.cField9	CallSheetEx.nField15
CallSheetEx.cField10	CallSheetEx.nField16
CallSheetEx.cField11	CallSheetEx.nField17

CallSheetEx.cField12	CallSheetEx.nField18
CallSheetEx.cField13	CallSheetEx.nField19
CallSheetEx.cField14	CallSheetEx.nField20
CallSheetEx.cField15	CallSheetEx.nField21
CallSheetEx.cField16	CallSheetEx.nField22
CallSheetEx.cField17	CallSheetEx.nField23
CallSheetEx.cField18	CallSheetEx.nField24
CallSheetEx.cField19	CallSheetEx.nField25
CallSheetEx.cField20	CallSheetEx.nField26
CallSheetEx.cField21	CallSheetEx.nField27
CallSheetEx.cField22	CallSheetEx.nField28
CallSheetEx.cField23	CallSheetEx.nField29
CallSheetEx.cField24	CallSheetEx.nField30
CallSheetEx.cField25	CallSheetEx.nField31
CallSheetEx.cField26	CallSheetEx.nField32
CallSheetEx.tField1	CallSheetEx.nField33
CallSheetEx.tField2	CallSheetEx.nField34
CallSheetEx.tField3	CallSheetEx.nField35
CallSheetEx.tField4	CallSheetEx.lField1
CallSheetEx.tField5	CallSheetEx.lField2
CallSheetEx.tField6	CallSheetEx.lField3
CallSheetEx.tField7	CallSheetEx.lField4
CallSheetEx.tField8	CallSheetEx.lField5
CallSheetEx.tField9	CallSheetEx.lField6
CallSheetEx.tField10	CallSheetEx.lField7
CallSheetEx.nField1	CallSheetEx.lField8
CallSheetEx.nField2	CallSheetEx.lField9
CallSheetEx.nField3	CallSheetEx.lField10
CallSheetEx.nField4	CallSheetEx.mField1
CallSheetEx.nField5	CallSheetEx.mField2
CallSheetEx.nField6	CallSheetEx.mField3

CallSheetResults Table (Applied to all results/sections of the Work Order from this procedure run)

CallSheetResults.cStatus	CallSheetResults.mNotes
CallSheetResults.cCallSheetResultType	

Assets Table

Assets.cSerialNumber	Assets.nItemCost
Assets.cModelNumber	Assets.tInventoryDate
Assets.cPartNumber	Assets.tInServiceDate
Assets.cStockNumber	Assets.tStatusDate
Assets.cStatus	Assets.tPurchaseDate

Assets.cDisposition	Assets.tAssignedGroupDate
Assets.cAssignedGroup	Assets.tWarrantyDate
Assets.cClass	Assets.mWarrantyInfo
Assets.cGroup	Assets.mAccuracy
Assets.cFamily	Assets.mUncertaintyNotes
Assets.cStandardType	Assets.mNotes
Assets.cDescription	Assets.lStandard
Assets.cPhysicalLocation	Assets.lRecallMaintenanceType
Assets.cWeightUOM	Assets.nUseCount
Assets.cWeight	Assets.nQuantity
Assets.cDimension	Assets.lOnSite
Assets.cAssignedContact	Assets.lNonTracked
Assets.cOptional1	Assets.lOptional
Assets.nReplacementCost	Assets.clD

AssetEx Table

AssetEx.cField1	AssetEx.tField1
AssetEx.cField2	AssetEx.tField2
AssetEx.cField3	AssetEx.tField3
AssetEx.cField4	AssetEx.tField4
AssetEx.cField5	AssetEx.tField5
AssetEx.cField6	AssetEx.tField6
AssetEx.cField7	AssetEx.tField7
AssetEx.cField8	AssetEx.tField8
AssetEx.cField9	AssetEx.tField9
AssetEx.cField10	AssetEx.tField10
AssetEx.cField11	AssetEx.nField1
AssetEx.cField12	AssetEx.nField2
AssetEx.cField13	AssetEx.nField3
AssetEx.cField14	AssetEx.nField4
AssetEx.cField15	AssetEx.nField5
AssetEx.cField16	AssetEx.nField6
AssetEx.cField17	AssetEx.nField7
AssetEx.cField18	AssetEx.nField8
AssetEx.cField19	AssetEx.nField9
AssetEx.cField20	AssetEx.nField10
AssetEx.cField21	AssetEx.lField1
AssetEx.cField22	AssetEx.lField2
AssetEx.cField23	AssetEx.lField3
AssetEx.cField24	AssetEx.lField4
AssetEx.cField25	AssetEx.lField5
AssetEx.cField26	AssetEx.lField6
AssetEx.cField27	AssetEx.lField7

AssetEx.cField28	AssetEx.lField8
AssetEx.cField29	AssetEx.lField9
AssetEx.cField30	AssetEx.lField10
AssetEx.cField31	AssetEx.mField1
AssetEx.cField32	AssetEx.mField2
AssetEx.cField33	
AssetEx.cField34	
AssetEx.cField35	

Service and Due Date fields: If the database fields *CallSheets.tMaintDate* (Service Date) and *CallSheets.tMaintNextDate* (Due Date) are selected when configuring a Pre Prompt, the Required, Read Only and Make Blank fields are disabled with the following values:

Required = No
Read Only = Yes
Make Blank = No

When the Pre Prompt is displayed in MET/CAL, these fields are populated from the database and cannot be changed.

CallSheetResults fields: If the database fields from the CallSheetResults table are selected, the Read Only and Make Blank columns are disabled with the following values:

Read Only = No
Make Blank = Yes

Read Only column: When the Read Only option is set to Yes, the Required and Make Blank columns are set to No and disabled.

Data Checks

The Data Checks menu is used to create snippets of code which customize the behavior of MET/TEAM. Data Checks are blocks of JavaScript and/or SQL code which can be executed on a specific page when data is saved to the database. This functionality is for experienced users with JavaScript knowledge.

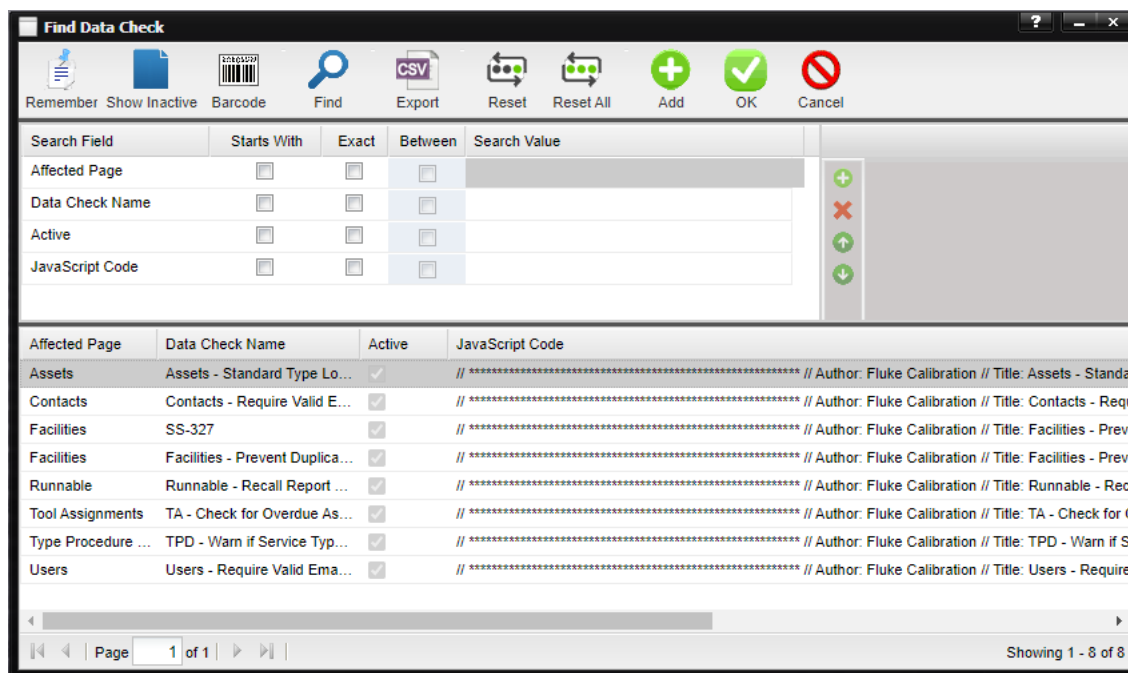
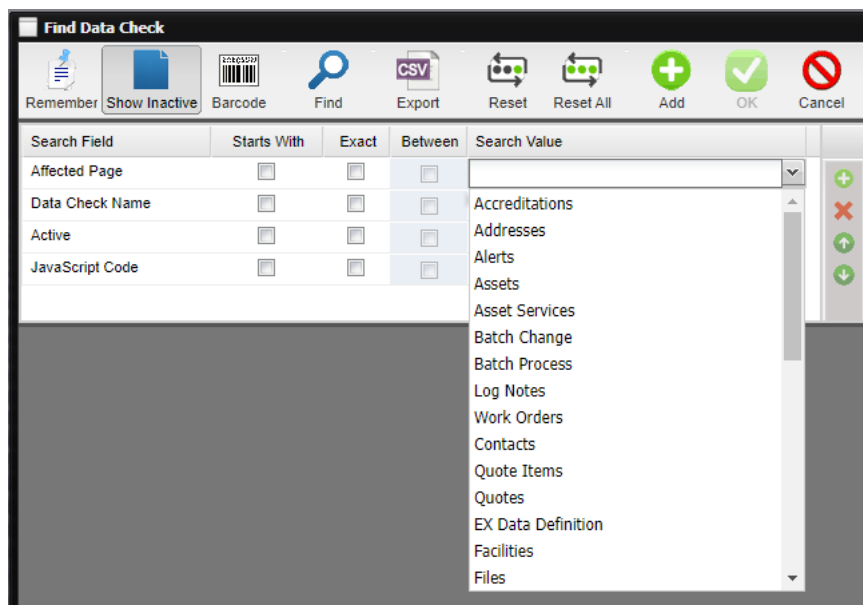
Data Checks are processed in a “first come first served” basis. There is no post-ordering other than natural record order, meaning that whichever Data Check was created first is executed first for that page. If you are using multiple Data Checks on a page, consider combining the individual Data Checks into a single Data Check, allowing for control of order.

MET/TEAM comes with a standard set of Data Checks that may be used. It is recommended that you use one of these Data Checks as a starting point for creating your own Data Checks. The following is a brief description of each example.

- **Assets - Standard Type Logic (v3)** – This Data Check applies to the Assets page. When active, it forces the user to select the Standard Type when an Asset is marked as a Standard.
- **Contacts - Require Valid Email (v3)** – This Data Check applies to the Contacts page. When active, it performs basic validation for the email address.
- **Facilities - Prevent Duplicate Names (v3)** – This Data Check applies to the Facilities page. When active and a Facility is being added, it checks to ensure that the Facility name is not a duplicate of an existing Facility name.

- **Facilities - Require Extended Data Field1 (v3)** – This Data Check applies to the Facilities page. When active and a Facility is being edited, it ensures that the Extended Data field cField1 has been populated before saving the record.
- **Procedures - Prevent Modification (v3)** – This Data Check applies to the Procedures page. When active, it prevents the user from saving changes to the Procedure Name and Procedure Number fields.
- **Receiving - Require Same Contact (v3)** – This Data Check applies to the Receiving page. When active, it ensures that the Contact Info matches for all assets being received.
- **Runnable - Manage Recall (v3)** – This Data Check applies to Scheduled Alerts. When active and selected for a scheduled alert, it generates a list of contacts for the selected Recall report for the alert.
- **Runnable - Problem Report Alert (v3)** – This Data Check applies to Scheduled Alerts. When active and selected for a scheduled alert, it generates a list of contacts for the selected Problem Report report for the alert.
- **Runnable - Recall Escalation Tool Assignment (v3)** – This Data Check applies to Scheduled Alerts. When active and selected for a scheduled alert, it generates a list of contacts for the selected Tool Assignment Recall report for the alert.
- **Runnable - Recall Report w Level (v3)** – This Data Check applies to Scheduled Alerts. When active and selected for a scheduled alert, it generates a list of contacts for the selected Recall report for the alert.
- **TA - Check for Overdue Asset (v3)** – This Data Check applies to the Tool Assignments page. When active, it prompts the user when the expected Return Date of a Tool Assignment is after the calibration due date.
- **TPD - Warn if Service Type Mismatch (v3)** – This Data Check applies to the Type Procedure Default page. When active, it warns the user if the procedure's Service Type does not match Type Procedure Default's Service Type.
- **Users - Require cEmail1 (v3)** – This Data Check applies to the Users page. When active, it requires the EMail 1 field to have a value.
- **Users - Require Valid Email (v3)** – This Data Check applies to the Users page. When active, it performs basic validation for the email address.
- **Work Orders - Warn if Partial Cal not Done (v3)** – This Data Check applies to the Work Orders page. When active, it prompts the user if the MET/CAL procedure has not executed fully.
- **Work Orders - WO Cert Format (v3)** – This Data Check applies to the Work Orders page. When active, it matches the certificate to the associated Type Procedure Default upon changing the procedure.

The Find Data Check screen displays the data checks that currently exist in MET/TEAM. Highlight a row and double click to open the Data Check and view the details.



If the active checkbox is checked, the Data Check is currently active and being used within MET/TEAM.

If the active checkbox is unchecked, the Data Check is not being used in MET/TEAM. To view the inactive data checks, select the Show Inactive button in the toolbar.

The form which a given Data Check affects can be noted by the “Affected Page” column. Additionally, you can see more information about each respective data check such as the last time it was updated and a brief snippet of the code that is being used.

Show Inactive – Used to toggle between showing all Data Checks (regardless of the Active state) and only showing the currently applied (being used) Data Checks.

Add – Used to add a new Data Check. This opens the Add Data Check dialog.

Cancel – Used to exit the screen.

To modify a Data Check, double click any item in the grid to automatically navigate to the Edit page.

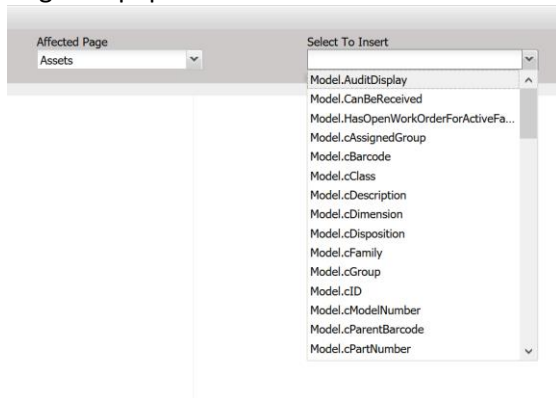
To add a Data Check, select the Add button at the top of the Find Data Check screen. The Add Data Check screen is displayed.

Add Data Check

The Add Data Check screen toolbar allows for copying, adding, deleting, saving and validating a Data Check, as well as navigating to the Find Data Check screen.

- **SQL Functions** – This grid displays any associated SQL scripts that you wish to access from the Data Check.
- **Data Check Name** – The name given to this particular Data Check. Required when adding a new Data Check.
- **Active** – If checked, the Javascript code is executed each time the selected Affected Page is saved.
- **Affected Page** – The page (screen) that this Data Check is being applied to. Required when adding a new Data Check.
- **Select To Insert** – This drop-down lists the properties of the model underlying the selected Affected Page. Selecting an item will insert it at the current cursor position. Changing the Affected Page setting causes this list

to get re-populated.



- **Text Area** – The area where the Javascript is written. *Required when adding a new Data Check.*

The buttons at top of the screen perform multiple functions.

Find – Used to return to the Find Data Check screen.

Copy – Used to copy an existing Data Check.

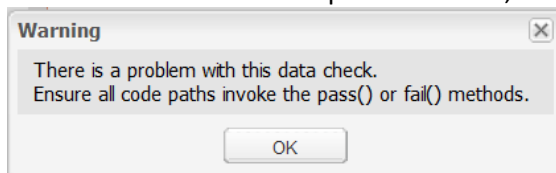
Add – Used to add a new Data Check.

Delete – Used to delete a Data Check.

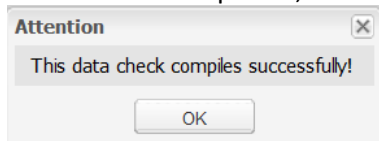
Save – Used to save a Data Check.

Validate – Used to validate the Data Check.

- If the Data Check does not pass validation, a message box is displayed.



- If the Data Check passes, a success message is displayed.



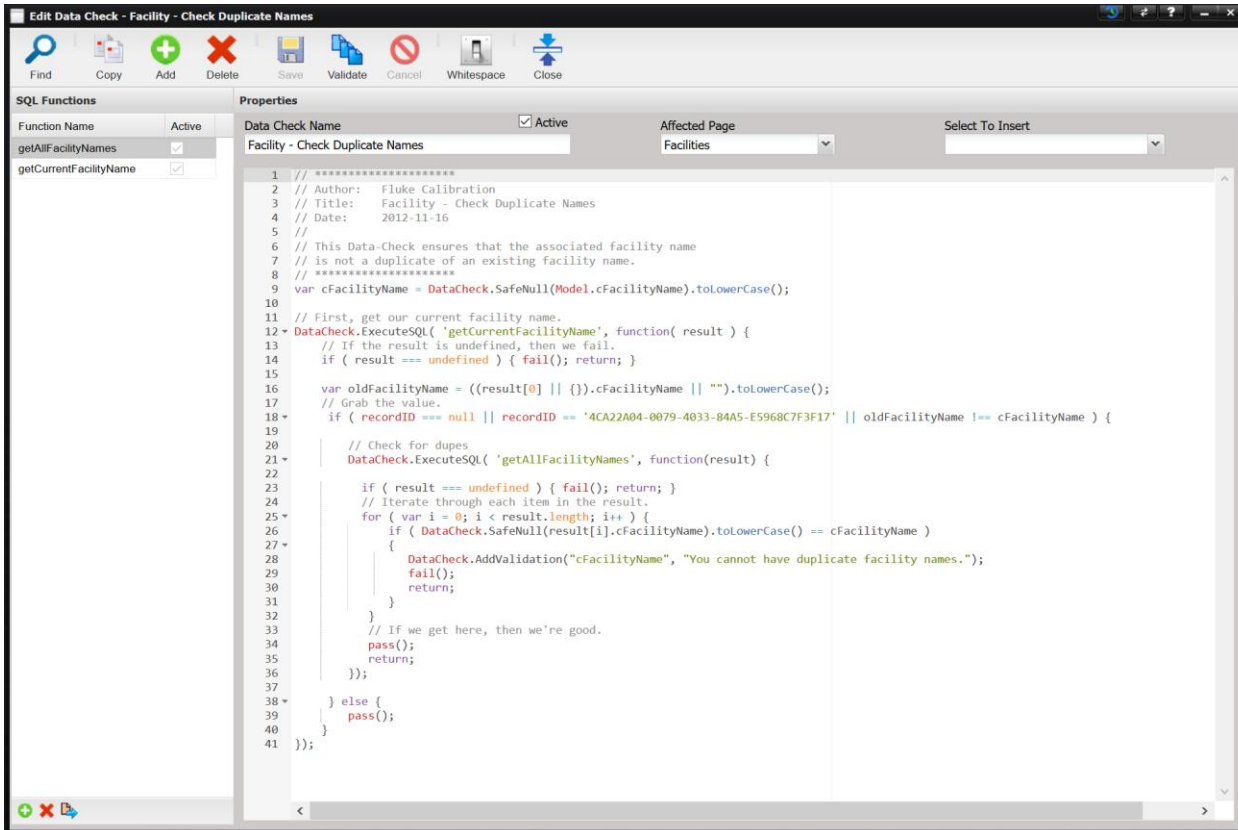
Cancel – Used to cancel the adding activity.

Whitespace – Toggles the display of whitespace characters in the Javascript code.

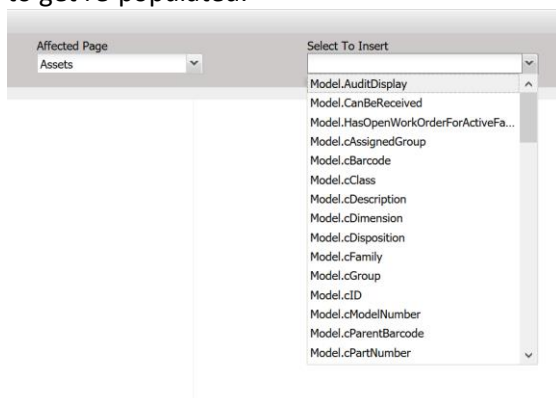
Close – Used to close the screen.

Edit Data Check

The Edit Data Check screen is used for editing existing Data Check validation scripts. Syntax highlighting is included for making writing data checks easier.



- **SQL Functions** – This grid displays any associated SQL scripts that you wish to access from the Data Check.
- **Data Check Name** – The name given to this particular Data Check.
- **Active** – If checked, the Javascript is executed each time the Affected Page is saved.
- **Affected Page** – The page (screen) that this Data Check is being applied to.
- **Select To Insert** – The drop-down lists the properties of the model underlying the selected Affected Page. Selecting an item will insert it at the current cursor position. Changing the Affected Page setting causes this list to get re-populated.



- **Text Area** – The area where the Javascript is written.

The buttons at top of the screen perform multiple functions.

Find – Used to return to the Find Data Check screen.

Add – Used to add a new Data Check.

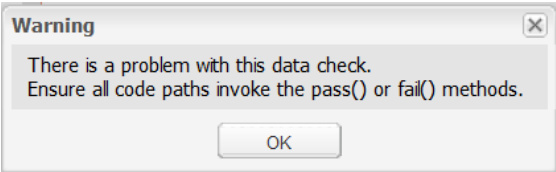
Copy – Used to copy an existing Data Check.

Delete – Used to delete a Data Check.

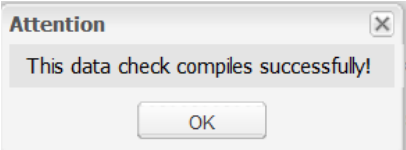
Save – Used to save a Data Check.

Validate – Used to validate the Data Check.

- If the Data Check does not pass validation, a message box is displayed.



- If the Data Check passes, a success message is displayed.



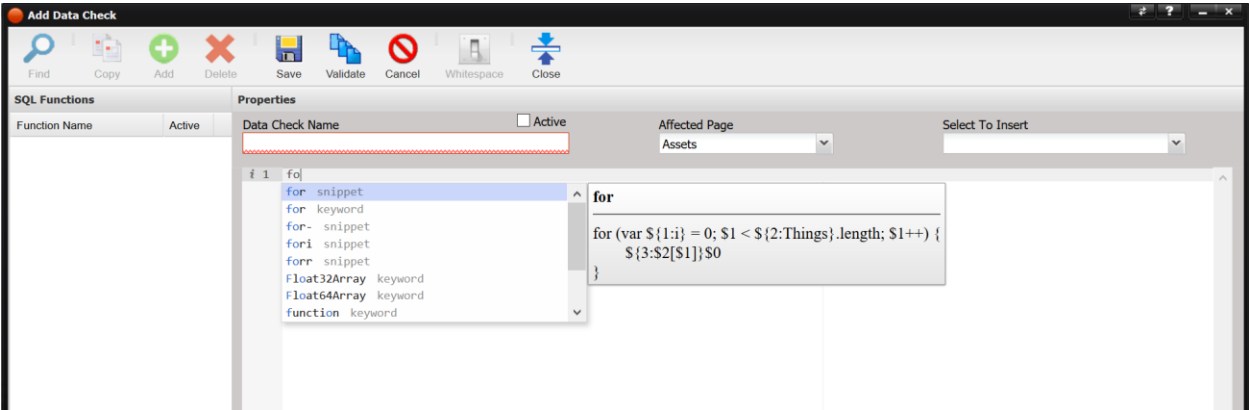
Cancel – Used to cancel the adding activity.

Whitespace – Toggles the display of whitespace characters in the Javascript code.

Close – Used to close the screen.

Data Check Keywords

When writing or modifying an existing Data Check, there are many built-in methods available to you which expose information that you can validate against. All methods reside within a Javascript namespace titled *DataCheck*.



A suggestion popup is displayed as you write the Javascript code that lists keywords, including database table names, and provides other syntax information where applicable.

The following tables explain the currently supported methods and global variables.

Global Variables		
appVersion		<p>This variable indicates the current version of MET/TEAM. It is formatted as a comma-delimited list of numbers as follows:</p> <p><major>,<minor>,<build>,<revision></p> <p>where:</p> <p><major> = Major version number</p> <p><minor> = Minor version number</p> <p><build> = Build number</p> <p><revision> = Revision number</p>

Context		This is a variable you can use to store information shared between records, specifically in multiple record-set pages such as Receiving and Returning.
Model		<p>This variable can be accessed anywhere within the Data Check and relates to the Model-Data of the current page the user is submitting.</p> <p>For a list of properties associated with the current model, use the Select to Insert drop-down list.</p> <p>Note: <i>The value of this model is the data currently being submitted, not the value it used to be.</i></p>
Global Methods		
<i>DataCheck.AddValidation</i>	Parameters Control Name Message	When this method is invoked, attention is drawn to the control specified by highlighting the input box with red and attaching a tool-tip message describing why validation failed.
<i>DataCheck.Alert</i>		This method is used to send an alert message to the user, providing them with information. It is typically useful when describing why a validation failed.
<i>DataCheck.Confirm</i>	Parameters Title Message Callback	This method is used when asking a YES/NO question to the user. The callback supplied is passed a string object. If the user selects “Yes” (regardless of localization), the object contains the value “Yes”.
<i>DataCheck.Debug</i>	Parameters Message Object	<p>This method can be used to write a debug message and optionally object contents to the Data Check debugging log file to facilitate troubleshooting a Data Check as it is being developed. All <code>DataCheck.Debug()</code> statements should be commented out or removed once the Data Check is working as expected to not hinder performance. Object content will be written to the log file in JSON format, enclosed in square brackets and double-quotes.</p> <p>The Data Check debugging log file is found in the web site’s \Logs folder on the server and is named “DataCheckDebug_<yyyymmdd>.log”.</p> <p>Note: Due to the asynchronous nature of Javascript, you cannot rely on this method to produce a chronological series of log entries. It should be used only to reveal things such as object/variable values, branching and decisions, etc.</p> <p>Examples:</p> <pre>DataCheck.Debug('Your log file message here...'); DataCheck.Debug('Model:', Model);</pre>
<i>DataCheck.ExecuteSQL</i>	Parameters Function Name Callback	This method invokes the associated SQL script. The first parameter refers to the named SQL script which must be associated with the Data Check in the grid located on the left side of the screen. The callback

		parameter is passed a record-set object containing the results of the SQL script.
<i>DataCheck.ExecuteSQLParams</i>	Parameters Function Name Parameters Callback	<p>This method invokes the associated SQL script. The first parameter refers to the named SQL script which must be associated with the Data Check in the grid located on the left side of the screen. The second parameter is a string of delimited parameter values enclosed in double-quotes. It can hold up to 10 values, separated by the pipe symbol . Within this string, values enclosed in single quotes are treated as literals. Numbers and names must not be enclosed in single quotes. The callback parameter is passed a record-set object containing the results of the SQL statement.</p> <pre>// pass 7 parameter values into ExecuteSQLParams DataCheck.ExecuteSQLParams('MySqlFunction', "cFacilityName 'Test' 100 1Active 'E' 9 10.5", function (result) { if (result === undefined result[0] === undefined) return; DataCheck.Alert("Attention", result[0].col1); pass(); }); pass();</pre>
<i>DataCheck.GetExName</i>	Parameters Property	<p>This method will search the page for an Extended Data grid. If it finds one, it will retrieve the <i>user configured name</i> for the supplied <i>property</i>. The parameter, <i>property</i>, refers to the field name that has been configured. For example: cValue1 would represent the first string field that you can configure.</p> <p>Using our sample data set, invoking this function while supplying cValue1 against the <i>Facilities</i> page would return the string 'K4612'</p> <p>Note: This method will return an empty string if no grid can be found.</p>
<i>DataCheck.GetExValue</i>	Parameters Property	<p>This method will search the page for an Extended Data grid. If it finds one, it will retrieve the value for the supplied <i>property</i> <u>at the time the Data Check began execution</u>. If no grid can be found, it will return a blank string. The parameter, <i>property</i>, refers to the field name that has been configured. For example: cValue1 would represent the first string field that you can configure.</p> <p>Note: This method will return an empty string if no grid can be found.</p> <p>Note: If an extended data value is changed using <i>DataCheck.SetExValue</i> during Data Check execution, the new value is NOT reflected in subsequent calls to this function.</p>
<i>DataCheck.GetName</i>	Parameters Property	<p>This method will search the page for a field. If it finds it, it will retrieve the name (label text) for that field. The parameter, <i>property</i>, refers to the field name. For example: cBarcode would represent the Barcode field for the Assets page.</p> <p>Invoking this function while supplying cBarcode against the Assets page would return the string 'Barcode' if using English, or the</p>

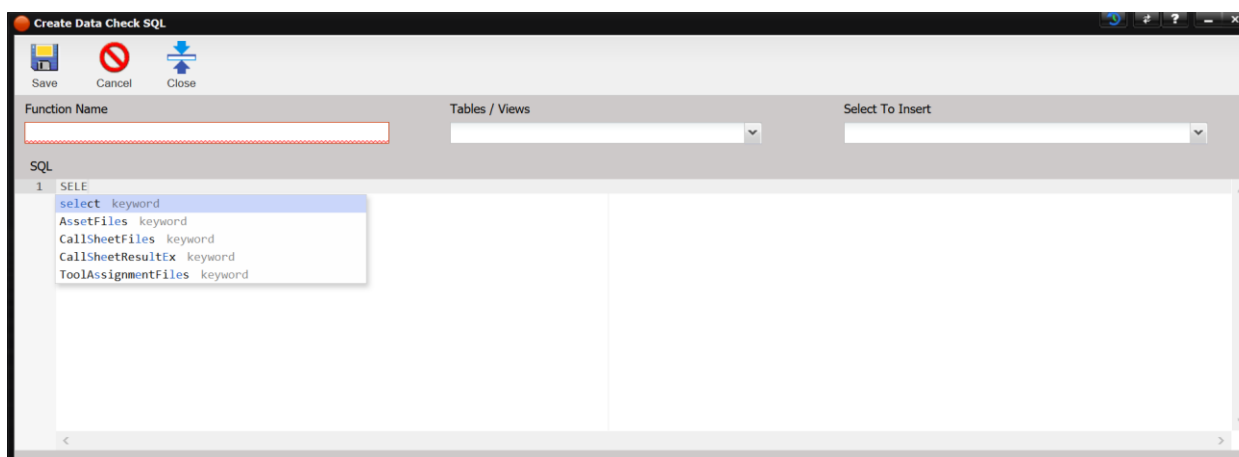
		<p>corresponding name in the current language. If the name of the field has been customized, the customized name is returned.</p> <p>Note: This method will return an empty string if the 'property' parameter is empty or not specified and returns the field name that was passed in if the corresponding field could not be found (i.e. no field by that name exists on the page).</p>
<code>DataCheck.GetValue</code>	Parameters Control Name	This method is used to get the value of a control field on the page.
<code>DataCheck.IsExEnabled</code>	Parameters None	<p>This method will search the page for an Extended Data grid. If it finds one, it will return whether or not the grid is <i>enabled</i> or <i>disabled</i>.</p> <p>Note: This method will return 'false' if no grid can be found.</p>
<code>DataCheck.IsCustomerPortal</code>	Parameters None	This method will return true if the current running application is Customer Portal, false otherwise.
<code>DataCheck.IsMetteam</code>	Parameters None	This method will return true if the current running application is MET/TEAM, false otherwise.
<code>DataCheck.IsMetteamMobile</code>	Parameters None	This method will return true if the current running application is MET/TEAM Mobile, false otherwise.
<code>DataCheck.Prompt</code>	Parameters Title Message Callback	This method is used to accept text from the user in a pop-up message box. The callback is supplied a string object containing the text that the user supplied.
<code>DataCheck.RemoveUTCOffset</code>	Parameters Date	<p>This method is for adjusting hard-coded date values in such a way that the resulting date value on screen after saving matches the hard-coded value. Without calling this function, the value displayed will be off by the difference between the local time zone and UTC.</p> <pre> if (DataCheck.IsExEnabled()) { DataCheck.SetExValue('tField1', DataCheck.RemoveUTCOffset('02/02/2022')); pass(); } else { pass(); } </pre> <p>In this example, tField1 on the extended data grid on Assets will show 02/02/2022.</p>
<code>DataCheck.SafeNull</code>	Parameters Value	This method checks for <i>null</i> or <i>undefined</i> in the input value and, if detected, replaces it with an empty string. It is used primarily as a helper function when traversing Models and SQL results.
<code>DataCheck.SetExValue</code>	Parameters Field Value	<p>This method is used to update a field on the Extended Data grid for a page. Field refers to the name of the extended data column, e.g. tField1. The update performed by the Data Check supersedes any changes done by the user manually, prior to saving the record.</p> <pre> if (DataCheck.IsExEnabled()) { </pre>

		<pre> DataCheck.SetExValue('tField1', '02/02/2022'); pass(); } </pre> <p>Note: This method does not work on the Tool Assignments page. To update an extended data value on the Tool Assignments page when performing an edit or a Check In, you must use a SQL command in the Data Check referencing <code>Model.ToolAssignment.nToolAssignmentUID</code> to identify the record to change. When performing a Check Out, the <code>Model.ToolAssignment.nToolAssignmentUID</code> value has not been determined yet and will always have a fixed value which does not match any existing <code>ToolAssignmentEx</code> record, since it has not been created yet.</p> <pre> // For Edit or Check In mode only if (DataCheck.ToolAssignmentMode() == 1 DataCheck.ToolAssignmentMode() == 2) { DataCheck.ExecuteSQLParams('Update_ToolAssignmentEx', Model.ToolAssignment.nToolAssignmentUID, function(result) { ... }); } </pre> <p>Where <code>Update_ToolAssignmentEx</code> SQL command is like:</p> <pre> UPDATE ToolAssignmentEx SET tUpdateTime = GETUTCDATE(), nUpdateUserUID = strUserUID, nUpdateFacilityUID = strActiveFacilityUID WHERE nToolAssignmentUID = 'strParam01' </pre>
<i>DataCheck.SetValue</i>	Parameters Control Name Message	This method is used to set the value of a control field on the page. Use it to change user input (for example, specifying a default date inside a date field).
<i>DataCheck.ToolAssignmentMode</i>	Parameters None	This method indicates the mode in which a Tool Assignment Data Check is running. Possible values are: 0 – Check Out mode 1 – Edit mode 2 – Check In mode -1 – Not applicable (the method was invoked from a non-Tool Assignment Data Check)
<i>DataCheck.UpdateRecipients</i>	Parameters Function Name Callback	This method works similar to <i>DataCheck.ExecuteSQL</i> . It accepts a <i>function name</i> which should refer to the named SQL script associated with the Data Check in the grid on the left side of the screen. The SQL must return a list of <code>nContactUID</code> values which will be used to update the recipient list of any alert that is associated with this Data Check. A

		dynamic Email Alert recipients lists can be created using only a Data Check. The <i>Callback</i> parameter is not passed any value, but will be invoked after the update code has executed.
System Methods		
\$.trim	Parameters Value	This method accepts a string 'Value' and returns a trimmed version of the string. Trimming a string means removing any surrounding spaces from the start and end. Note: <i>This method will return an empty string if the supplied parameter is null or undefined.</i>
fail	Parameters None	This method tells the data check that it has failed validation. Note: <i>Be sure to invoke "return" after calling this method to ensure no more processing happening.</i>
pass	Parameters None	This method tells the data check that it has successfully passed validation. Note: <i>Be sure to invoke "return" after calling this method to ensure no more processing happening.</i>

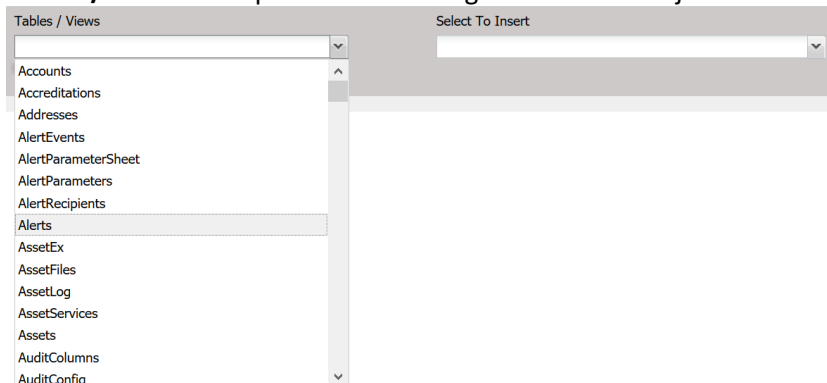
Data Check SQL

To execute SQL statements from within a Data Check, define the SQL script using the Data Check SQL page.

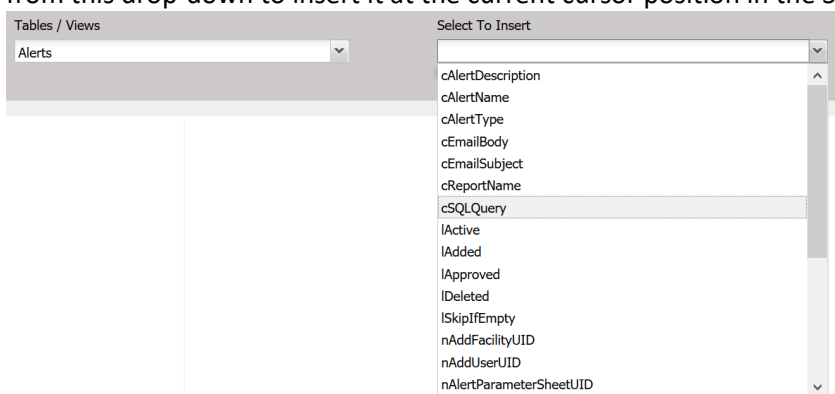


- **Function Name** – The user-friendly name which invokes the SQL script from within Javascript.

- **Tables / Views** – Drop-down containing all user table objects and views in the database.



- **Select To Insert** – Drop-down containing all columns of the selected table or view. Select an item (column name) from this drop-down to insert it at the current cursor position in the SQL script.



- **SQL** – The actual SQL script to be executed.

The buttons on top of the screen perform multiple functions.

Save – Saves the Data Check SQL record.

Cancel – Discards any changes you may have made.

Close – Closes the Data Check SQL page.

A suggestion popup is displayed as you write the SQL script that lists keywords, including database table names.

The following list contains special string-replace keys for use within SQL scripts. This token system provides enhanced security while enabling the ability to access needed information.

strUID – This token is replaced with the UID (Unique Identification) number of the current record the Data Check is being run against.

strAlertUID – This token is replaced with the UID of the currently running Email Alert. This token is only applicable for SQL run through the Email Alert Engine, otherwise it returns a -1.

strUserUID – This token is replaced with the UID of the currently logged in user.

strActiveFacilityUID – This token is replaced with the UID of the facility the current user is logged into.

strAuditLogInfo – This token is replaced with appropriate field references and values to set the update time and user information with the current time and the current user that is logged in. This should be added to any UPDATE SQL

statement so that the audit history is correct (example: UPDATE Assets SET cGroup = N'strParam01', strAuditLogInfo WHERE nAssetUID=...) Using this placeholder in an INSERT SQL statement is not supported.

strParam01 – This token contains the parameter passed into *ExecuteSQLParams*, at position 1

strParam02 – This token contains the parameter passed into *ExecuteSQLParams*, at position 2

strParam03 – This token contains the parameter passed into *ExecuteSQLParams*, at position 3

strParam04 – This token contains the parameter passed into *ExecuteSQLParams*, at position 4

strParam05 – This token contains the parameter passed into *ExecuteSQLParams*, at position 5

strParam06 – This token contains the parameter passed into *ExecuteSQLParams*, at position 6

strParam07 – This token contains the parameter passed into *ExecuteSQLParams*, at position 7

strParam08 – This token contains the parameter passed into *ExecuteSQLParams*, at position 8

strParam09 – This token contains the parameter passed into *ExecuteSQLParams*, at position 9

strParam10 – This token contains the parameter passed into *ExecuteSQLParams*, at position 10

Extended Data

The Extended Data option allows adding data fields that are not already present to specific screens.

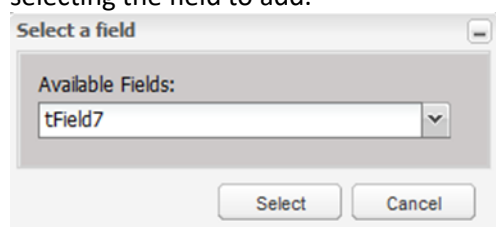
- **Affected Page** – The screen that will be affected by this change. For example, if Asset is selected, the extended data field that is selected from the Defined Fields list will be displayed on Assets Characteristics tab EX Data grid on the Asset screen.

- **Visible** – If checked, the data field is visible on the screen designated by the Affected Page field.
- **Defined Fields** – The list of fields that can be added.
- **Display Name** – The label for the extended data field on the Affected Page screen.
- **Display Type** – The type of field: Numeric, Text, Combo, Date, Currency, Memo, or Boolean.

Note: The Display Type and Defined Field type must match. See the [Display Type and Defined Type table](#).

- **Lab Type** – The lab affected by the change. System changes all labs.

To add fields to the Defined Fields list, select the “+” button next to this list. The Select a field dialog is displayed for selecting the field to add.



To delete fields from the Defined Fields list, select the “X” Delete button next to this list.

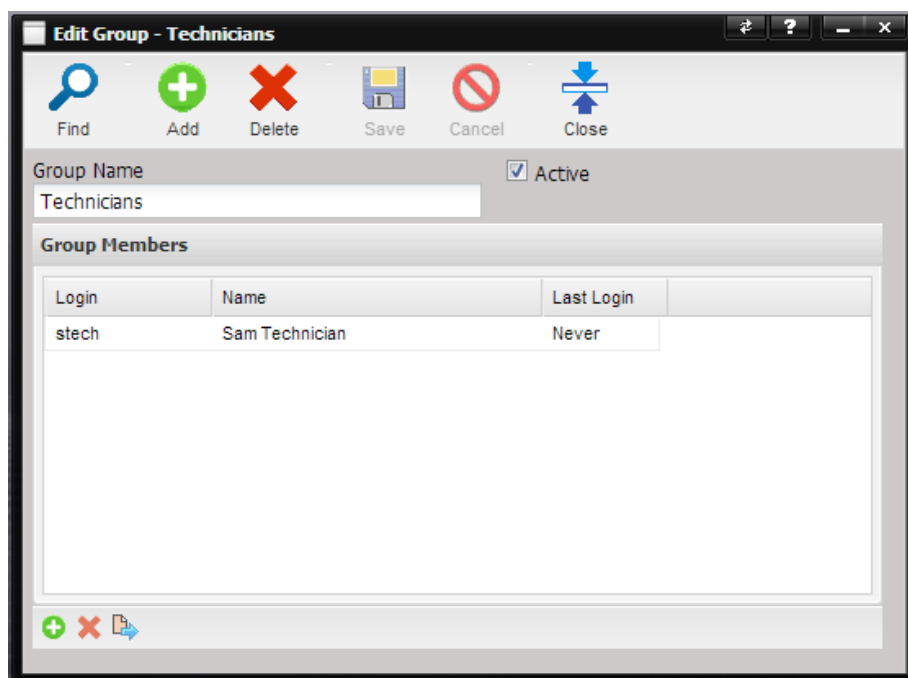
To arrange the list of fields within the Defined Fields list, use the “↑” and “↓” arrows.

DISPLAY TYPE AND DEFINED TYPE

Display Type	Function	Field Type
Numeric	Number Input	nField
Text	Text Input	cField
Combo	Drop Down	cField/mField
Date	Date Input	tField
Currency	Currency Input	nField
Memo	Long Text Input	mField
Boolean	Check box Input (Logical)	lField

Groups

The Groups option is for creating Security Groups and assigning members to groups.



- **Group Name** – The name of the Group being displayed.
Note: Never change the name of a default (built-in) group as this could cause permissions to not be properly recognized or honored.
- **Active** – If checked, the Group is visible in the MET/TEAM application.
- **Group Members** – Displays the Users that are assigned to this Group.

Group Members

The Group Members grid contains a list of users that belong to this group.

- **Login** – The User's user name that is used to log in to the MET/TEAM application.
- **Name** – The User's full name.
- **Last Login** – The date the User last logged in to the MET/TEAM application.

To add a member to the Group, select the "+" button.

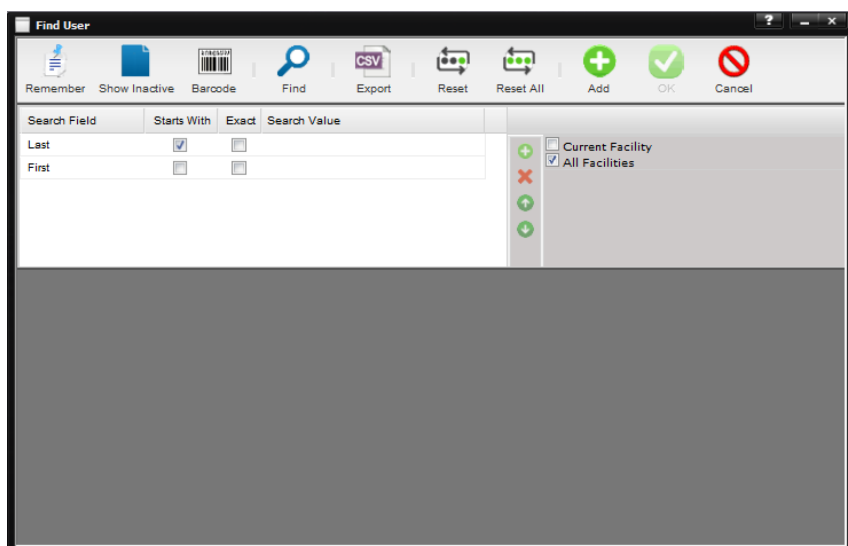
To remove a member, highlight the row containing the User's name and select the "X" button.

To view or edit the member's User record, highlight the row containing the User's name and select the Quick Link button.

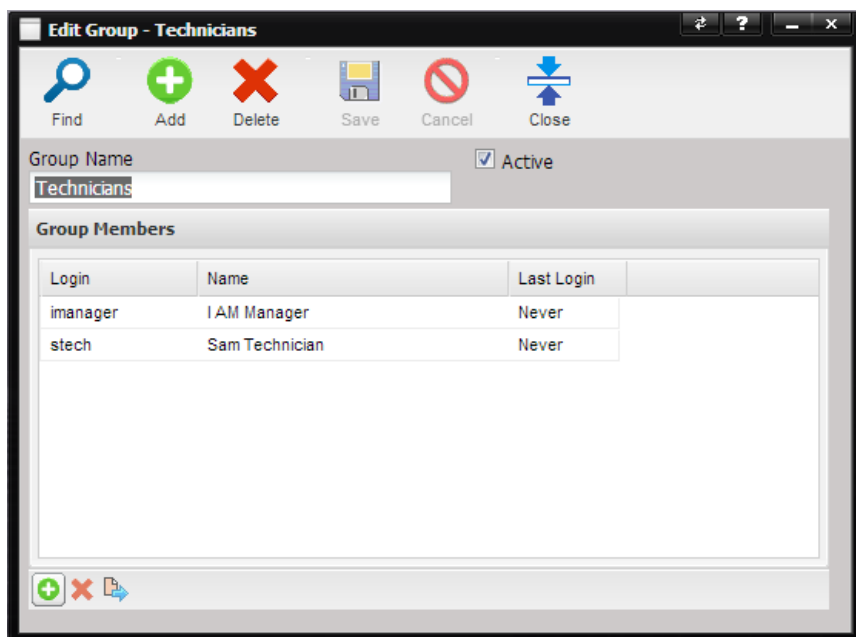
Adding Users to a Group

Users can be added to a Group from the Setup Users menu option or by selecting the "+" button at the bottom of the Edit Group screen.

The Find User screen is displayed. Select the Find button to display a list of Users or narrow down the search criteria using the Starts With and Exact check boxes along with data in the Search Value.



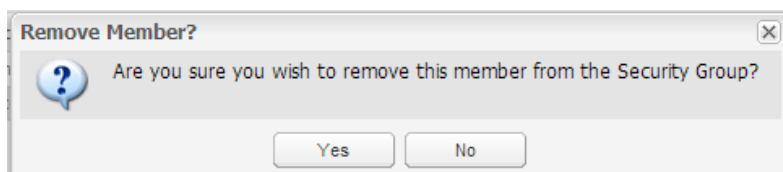
Select the User to add and press the OK button. The User is added to the Group Members grid.



Deleting Users from a Group

To delete a User from a Group, highlight the row containing the User's name and select the "X" button at the bottom of the Group Members grid.

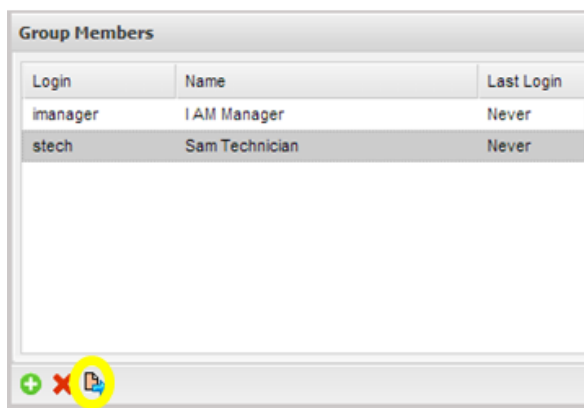
A prompt is displayed asking you to confirm the deletion.



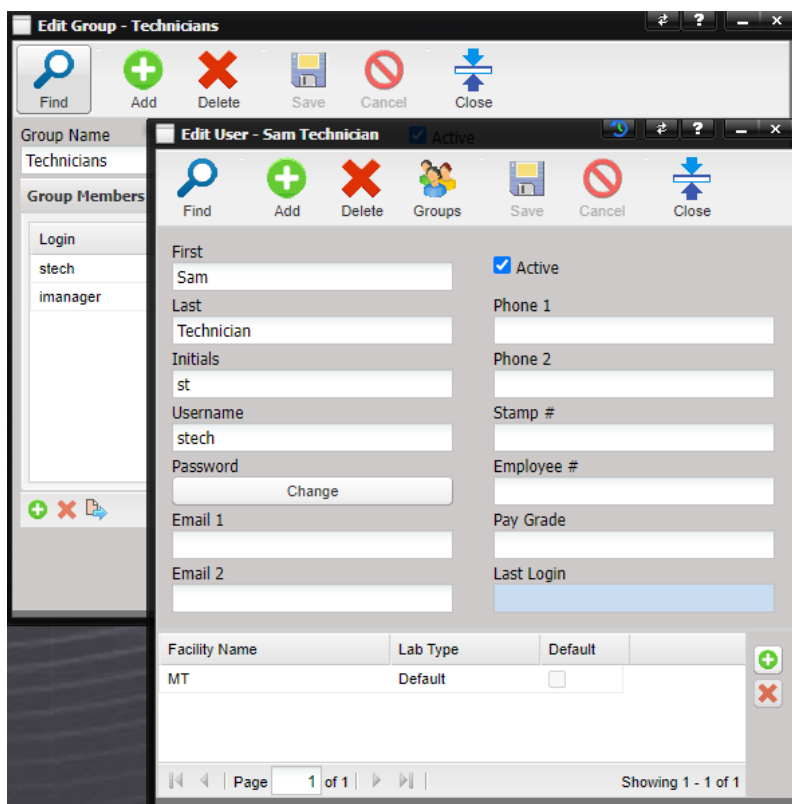
Select 'Yes' to remove this User or No to leave the User in the grid.

Viewing User Information

To view the User information, highlight the row containing the User's name and select the Quick Link button at the bottom of the Group Members grid.

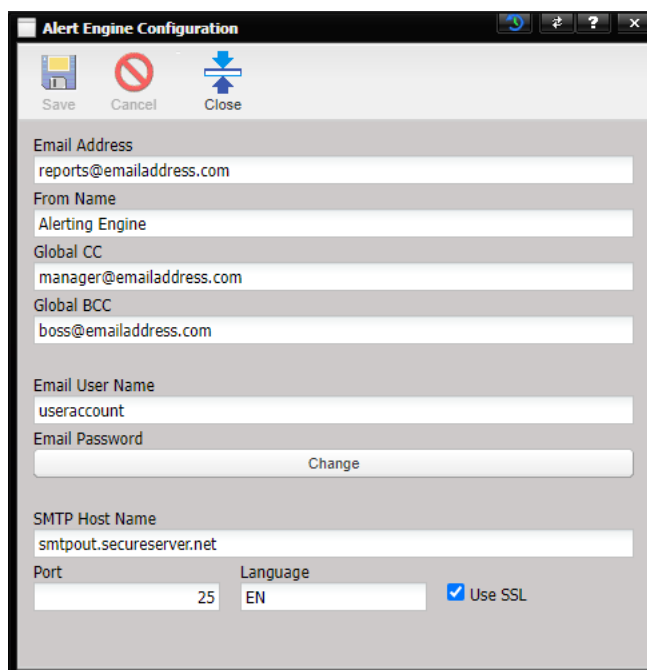


The Edit User screen is displayed with the User's information.



Alert Engine Configuration

This screen allows for configuring the parameters used by the Alerting Engine.

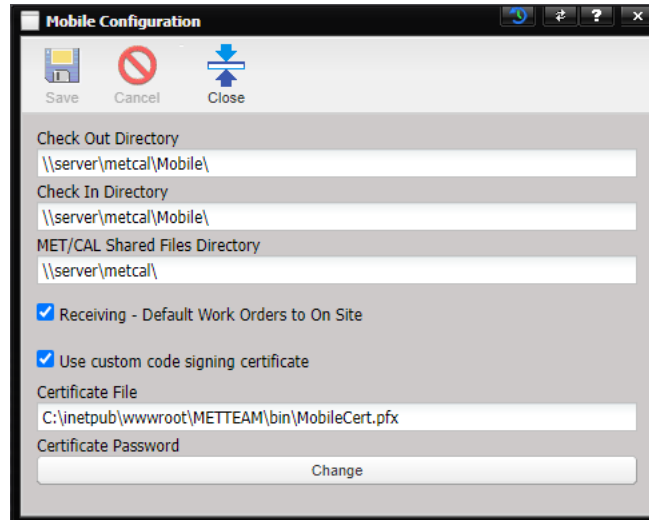
A screenshot of the 'Alert Engine Configuration' dialog box. At the top, there are three buttons: 'Save' (floppy disk icon), 'Cancel' (red circle with slash icon), and 'Close' (blue double arrow icon). Below these are several text input fields: 'Email Address' (reports@emailaddress.com), 'From Name' (Alerting Engine), 'Global CC' (manager@emailaddress.com), 'Global BCC' (boss@emailaddress.com), 'Email User Name' (useraccount), and 'Email Password' (with a 'Change' button). At the bottom, there are fields for 'SMTP Host Name' (smtpout.secureserver.net), 'Port' (25), 'Language' (EN), and a checked 'Use SSL' checkbox.

- **Email Address** – The email address to use in the “From” field for emails generated by the Alert Engine.
- **From Name** – The “friendly” name associated with the email address used in the “From” field.
- **Global CC** – (Optional) The email address to use in the “CC” field for emails generated by the Alert Engine.
- **Global BCC** – (Optional) The email address to use in the “BCC” field for emails generated by the Alert Engine.
- **Email User Name** – The user name for the account to use when connecting to the SMTP server.
- **Email Password** – The password for the account to use when connecting to the SMTP server. Click the Change button to enter the password to use.
- **SMTP Host Name** – The URL of the SMTP server that the Alert Engine should use to generate emails.
- **Port** – The port number for the SMTP server.
- **Language** – The two-letter language code that indicates what language the Alert Engine should use when generating reports.
- **Use SSL** – Indicates whether the SMTP server requires using SSL.

These settings must be configured before enabling the Alert Engine.

Mobile Configuration

This screen allows for configuring the parameters used by MET/TEAM Mobile.



- **Check Out Directory** – The directory where MET/TEAM will place files to be transferred from the server to the Mobile Workstation when performing a Check Out.
- **Check In Directory** – The directory where MET/TEAM will place files to be transferred from the Mobile Workstation to the server when performing a Check In.
- **MET/CAL Shared Files Directory** – The root directory for the MET/CAL shared files. When using MET/CAL, the content of this directory and most subdirectories will get copied to the Mobile Workstation for offline use.
- **Receiving – Default Work Orders to On Site** – Determines whether Work Orders created on the Mobile Workstation while checked out have the On Site option checked during the Receiving process.
- **Use custom code signing certificate** – Determines if a custom code signing certificate will be used to digitally sign the Mobile Check Out/In application instead of a generic certificate.
- **Certificate File** – If the above option is checked, this references the fully-qualified path and filename of the custom code signing certificate to use. This field is disabled if the above option is unchecked.
- **Certificate Password** – The password associated with the custom code signing certificate. This field is disabled if the above option is unchecked.

The **Check Out Directory**, **Check In Directory** and **MET/CAL Shared Files Directory** are typically set by the installer when MET/TEAM was deployed to the server. These directories must be UNC paths (i.e. \\server\share\...) that are accessible by both the server and the Mobile Workstation with full read/write permissions. Typically, the **Check Out Directory** and **Check In Directory** reference the same location. These paths should end with a backslash “\”.

MET/TEAM includes a generic code signing certificate that it uses to digitally sign the Mobile Check Out/In application that it generates on-the-fly and downloads to the Mobile Workstation when performing a Mobile Check Out or Mobile Check In. This application is sometimes flagged by anti-virus software as suspicious if it is not digitally signed. The generic certificate is used by default when the **Use custom code signing certificate** option is unchecked.

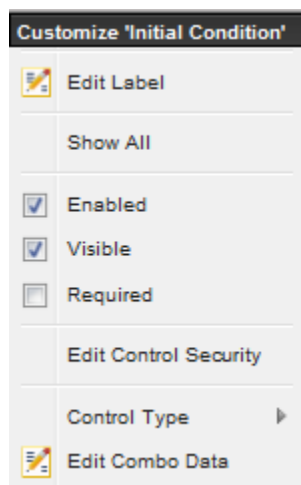
If anti-virus software flags the application signed by the generic code signing certificate as suspicious, obtain a code signing certificate (.pfx file) for your organization and place it in a MET/TEAM web site directory on the server that will be included in the Mobile Check Out process (C:\inetpub\wwwroot\METTEAM\bin is recommended), check the **Use custom code signing certificate** option and set the **Certificate File** field to the local path on the server to this file (typically C:\inetpub\wwwroot\METTEAM\bin\certificatename.pfx). Click the Change button on the **Certificate Password** field and enter the password associated with the certificate.

Customizing the User Interface

Note: This functionality is only available to administrative users and should be used with caution. Any changes made will affect every user. Refreshing the screen is required to see changes.

Customizing Labels and Fields

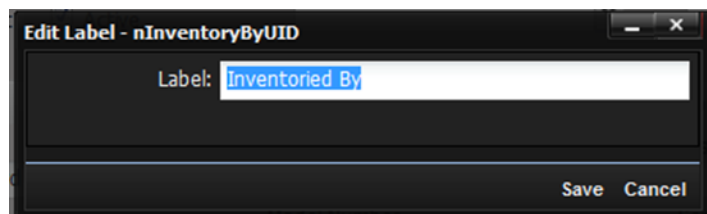
The MET/TEAM user interface can be customized by right clicking on a field's label. The Customize menu can be used to configure various properties for the field.



Note: The Enabled, Visible, Required, and Edit Control Security options are not enabled for MET/TEAM System required fields. If by chance these are available, they do not have any effect on read-only blue fields.

Edit Label – Used to change the field's label on the screen. Fill in the Label field on the Edit Label dialog. Press Save and the change is displayed.

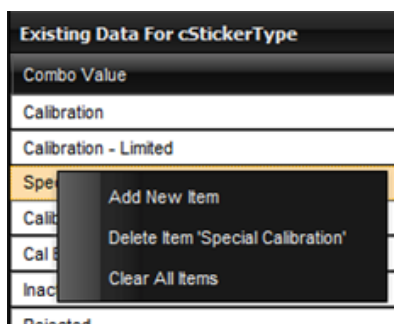
Hint: The title of the Edit Label screen indicates the name of the field (*nInventoryByUID* in this example) associated with the label. This information can be used when creating Data Checks.



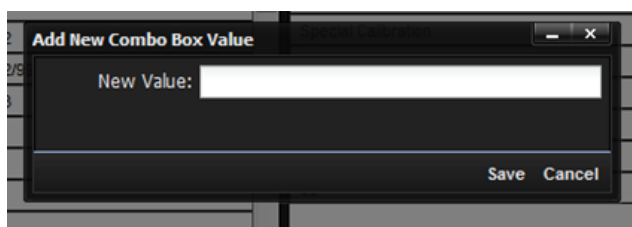
Edit Combo Data – For fields which are defined as ComboBoxes (drop-down lists), displays a dialog used for configuring the combo data (values) associated with the field. New values can be added or removed. ComboBoxes can be linked so that multiple screens share the same set of data.

- **Customization Option** – This setting indicates whether the Facility that you are currently logged in to has a customized list (Customize For This Facility) or uses a list that is shared with other Facilities (Customize For All Facilities).
 - To create a customized list for the current Facility, change this setting from Customize For All Facilities to Customize For This Facility and click Yes on the confirmation prompt. This change will not take effect until you click Save.
 - To discard a list that has been customized for the current Facility and revert to using the list that is shared with other Facilities, change this setting from Customize For This Facility to Customize For All Facilities and click Yes on the confirmation prompt. **Warning: This change will take effect immediately and the customized list cannot be restored!**
- **Link Values** – This setting indicates whether the selected field is linked to a field on another screen and shares the list of values with that field. You may change this setting to associate the selected field with another Combo Box if needed.
- **Available** – Lists the existing values that have been previously used for any Combo Box. You may drag a value from this list to the Existing Data For <Field Name> list to add it to the selected Combo Box. To search for a specific value, enter text into the Search box.
- **Existing Data For <Field Name>** – Lists the currently assigned Combo Box values.

To delete a value from either list, right-click the item and select Delete Item <Item Name> from the popup menu. In order to successfully delete a value from the Available list, the value must first be removed from the Existing Data For <Field Name> lists for all Combo Boxes.



To add a new value, right-click in either list and select Add New Item from the popup menu. Enter the new value in the dialog and click Save. The new value will be added to both the Available list and the Existing Data For <Field Name> list.



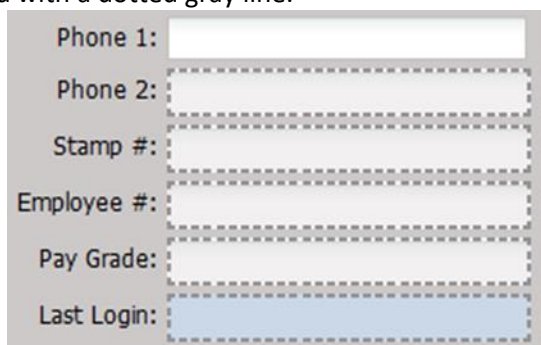
To add an existing value to the Existing Data For <Field Name> list, you may drag and drop values from the Available list to the Existing Data For <Field Name> list.

To delete all values from the Existing Data For <Field Name> list, right-click any list item and select Clear All Items. When using this feature to delete all values from a list that has been customized for a specific Facility, clicking Save when the list is empty will have the same effect as changing the Customization Option to Customize For All Facilities.

When all changes have been made, click Save to save the changes, then close the dialog. To discard any changes made, click Cancel.

To see which facilities have a customized list for the current field, click the page with arrow button next to the save button.

Show All – When selected, any hidden fields are revealed to allow further editing. Any field that is set as hidden is outlined with a dotted gray line.



Enabled – If checked, the control is enabled. If unchecked, the control is disabled and cannot be used. An error message is displayed when trying to make the control disabled if the control has already been marked as “Required”.

Note: Quick Link buttons are enabled or disabled independently from the control.

Visible – If checked, the control is visible. If unchecked, the control is not visible. An error message is displayed when trying to make the control invisible if the control has already been marked as “Required”.

***Note:** The Work Order Description field is linked to the Asset Description. If the Work Order Description field is hidden, you must go to the Asset screen (the Asset Description field will not be visible), right click on any field and select SHOW ALL. The dotted box will be displayed around the Asset Description field. Right click on the Asset Description field and select Visible. Now go to the Work Order screen and the Description field will be visible.*

***Note:** On the Work Order Extended Data tab, the Invoice Number field is linked to the Invoice Number field on the Invoice screen. If the Invoice Number field on the Work Order Extended Data tab is hidden, you must go to the Invoice screen, right click on any field and select SHOW ALL. The dotted box will be displayed around the Invoice Number field. Right click on the Invoice Number field and select Visible. Now go to the Work Order Extended Data tab and the Invoice Number field will be visible.*

Required – If checked, the control is required to have a non-empty value every time the screen is saved. If unchecked, the standard behavior will apply. An error message is displayed when trying to make the control required if the control has already been marked as disabled or not visible.

***Note:** Required is not enabled for checkboxes.*

Edit Control Security – Allows for managing the Security Groups that the field is enabled for and visible for. Select the appropriate groups and push the Save button.

Control Type – Allows for changing the type of the control: Text box or Drop-down list.

Securing Menus or Screens

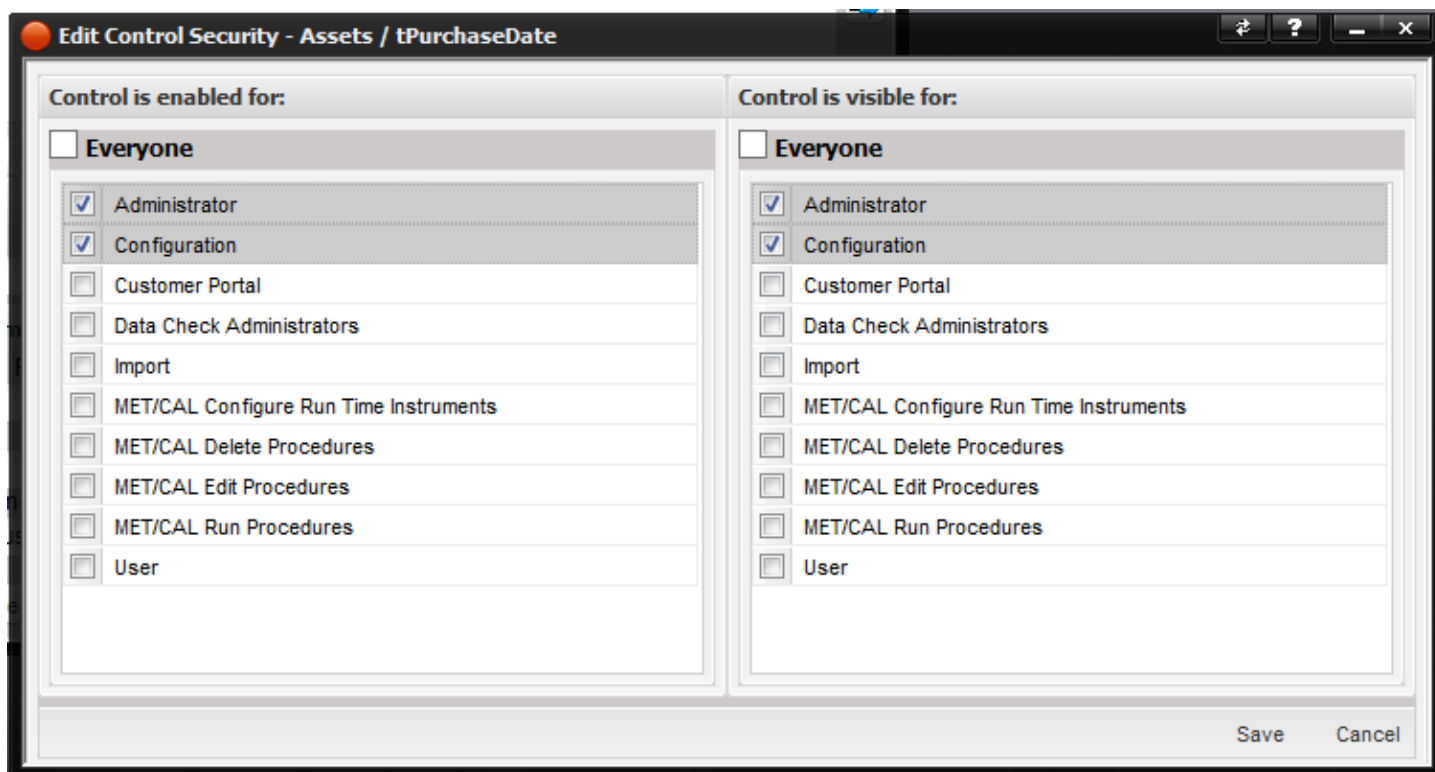
Securing access to menu options or screens can be accomplished using the Menu Security menu option in the Configure menu.

Securing MET/CAL Features

Securing access to features in MET/CAL applications can be accomplished using the MET/CAL Security menu option in the Configure menu.

Securing Fields

Securing individual fields can restrict which Users can see and/or change the value of that field. To secure a field, right-click on the label above the field and select Edit Control Security. The Edit Control Security screen is displayed.



This screen consists of two sections:

- **Control is enabled for** – This section allows the selected field to be enabled or disabled based on Security Group membership.
- **Control is visible for** – This section allows the selected field to be displayed or hidden based on Security Group membership.

If all MET/TEAM Users should be able to see/change a field, check the *Everyone* checkbox at the top of the corresponding section.

To restrict which Users can change the field value, uncheck the *Everyone* checkbox in the *Control is enabled for* section and check the Security Group(s) whose members should be allowed to change the value. Any User that does not belong to one of the checked Security Groups will not be allowed to change the field value.

To restrict which Users can see the field, uncheck the *Everyone* checkbox in the *Control is visible for* section and check the Security Group(s) whose members should be allowed to see the field. Any User that does not belong to one of the checked Security Groups will not be allowed to see the field.

Note: *The Configuration group and the Administrators group cannot be saved as unchecked for fields.*

Securing Buttons

The buttons used on the MET/TEAM user interface can be secured by right-clicking on the specific button. This customization requires users to log off to see the effect of any changes. Administrators or Configurators should make sure users are logged off prior to making changes.

Note: *Buttons cannot be made invisible. They can only be disabled.*

The Edit Control Security screen is displayed.

Edit Control Security – Allows for managing the user groups that the control is enabled for. Visibility settings are disabled for buttons. Select the appropriate groups and push the Save button.

See the Securing Fields section above for more details on how to restrict Users from accessing buttons.

Note: For buttons, the Configuration group and the Administrators group cannot be saved as unchecked in most cases. One exception to this is on the Edit User screen, where the Configuration group is allowed to be saved as unchecked.

Edit Control Security - /Asset/Edit/ / tbReceive

Control is enabled for:

- ☐ Everyone
- ☒ Administrator
- ☒ Configuration
- ☐ Customer Portal
- ☐ Data Check Administrators
- ☐ Edit Notes Fields
- ☐ Edit Results
- ☐ Import
- ☐ MET/CAL Configure Runtime Instruments
- ☐ MET/CAL Edit Procedures
- ☐ MET/CAL Run Procedures
- ☐ QC People
- ☐ User

Control is visible for:

- ☒ Everyone
- ☐ Administrator
- ☐ Configuration
- ☐ Customer Portal
- ☐ Data Check Administrators
- ☐ Edit Notes Fields
- ☐ Edit Results
- ☐ Import
- ☐ MET/CAL Configure Runtime Instruments
- ☐ MET/CAL Edit Procedures
- ☐ MET/CAL Run Procedures
- ☐ QC People
- ☐ User

Save Cancel

To see how the current setup was arrived at, review the change history. This requires Change Tracking to be enabled.

History Log

CSV

Export

Close

	Date	Changed by	Application	Table Name	Reason
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
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+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
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+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
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+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
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+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
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+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	N/A - Auditing inactive
+	01/09/2023 15:07	System Administrator	MET/TEAM	SecurityGroupFieldLinks	

Checkboxes that Cannot be Customized

The following list of check boxes cannot be customized because each is associated with field functionality on a screen.

Screen	Fields	Customize	Notes
Shipment	Shipped (checkbox)	No	Functionality associated with this field is tied to the Date Shipped.
Work Order - Labor	No Charge (checkbox)	No	Functionality associated with this field is tied to the Cost.
Facility	Customer (checkbox)	No	Functionality associated with this field is tied to No Tax.

Facility	Lab (checkbox)	No	Functionality associated with this field is tied to Inspect All.
Facility	No Tax (checkbox)	No	Functionality associated with this field is tied to Tax Rate.

Data Information

MET/TEAM Field Descriptions

Up to date MET/TEAM database field descriptions can be found by running the customer report “Label Information.rpt”.

MET/TRACK to MET/TEAM Field Map

A field mapping of MET/TRACK to MET/TEAM fields can be found here.

[METTRACK to METTEAM Field Map.xlsx](#)

Data Diagram

The MET/TEAM Database Diagram can be generated using SQL Server Management Studio.

Under the “metteam” database, right-click the Database Diagrams node and select New Database Diagram from the popup menu.

Sub Contracting Best Practices

This section explains our recommended process for doing Sub Contracting using the MET/TEAM application.

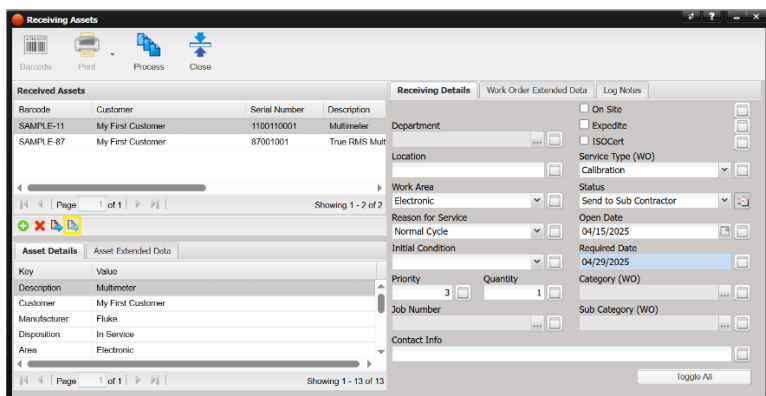
Note: The process described below assumes these Work Order statuses have been added by the System Administrator:

“Send to Sub Contractor”

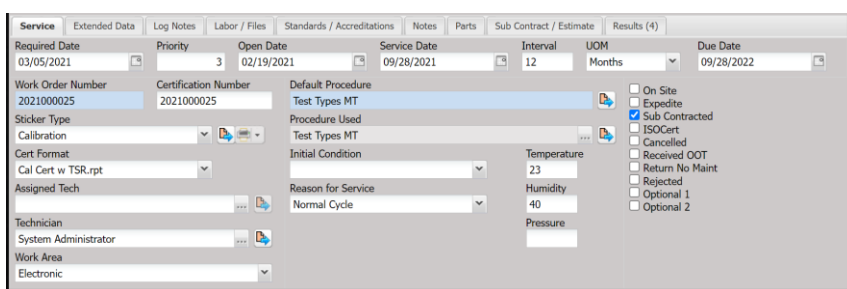
“Sent to Sub Contractor”

“Returned from Sub Contractor”

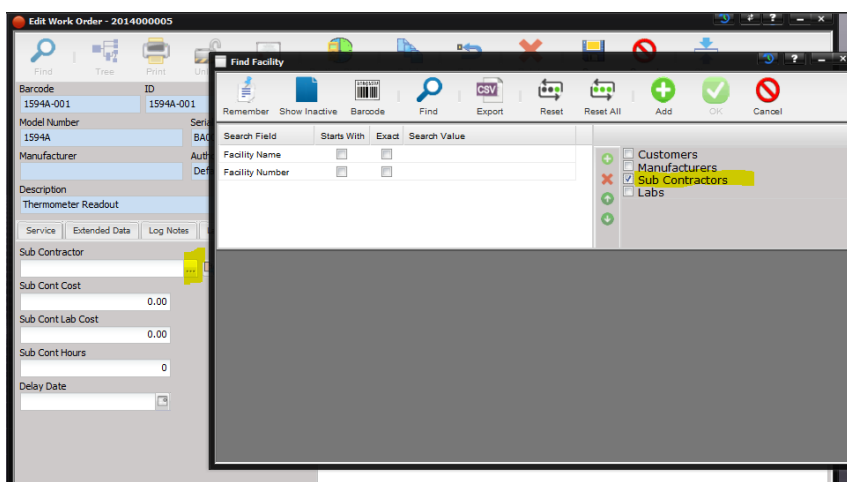
1. On the Type that is associated with the Asset that is being sub contracted, create a Procedure (for example: “Sub Contractor – Fluke”, “Sub Contractor – Agilent”).
2. Create a Work Order by selecting the Workflow menu Receiving sub menu.
3. From the Receiving screen complete the receiving details and all information pertaining to this asset. Select “Send to Sub Contractor” in the Status field and click the “copy” toggle button, and then the Process button and the asset will be processed.



4. After the Process button is selected, the *Edit Work Order* button is enabled. (Notice the yellow highlighted button in the screen shot above.) Select the Edit Work Order button and the Work Order is opened.
5. The Work Order is opened.
6. Check the Sub Contracted check box.



7. Select the Sub Contractor /Estimate tab and the Facility that is the Sub Contractor. The Sub Contractor is selected by pressing the “...” button next to the Sub Contractor field. This Facility must be setup ahead of time. The Find Facility screen is displayed. If the Sub Contractor check box is not selected, select this check box so you are choosing only from the Facilities that have been designated as approved Sub Contractors.



8. Enter any notes in the Notes field. Notes may include; who the asset was sent to, how the asset was sent (UPS, FedEx), the shipment number or tracking number, any notes related to the process, type of accreditation, possibly expected return date, quote back or fixed price.

Sub Contractor Notes

This was sent to Jason Overbridge.
 Accreditation required is 17025.
 Be sure to check the high and low resistances.

9. Enter the date you expect to receive the instrument back or enter the date the instrument was sent to the Sub Contracting Facility in the Delay Date field
10. If known, enter the price that you are charging the customer in the Sub Cont Cost field.
11. Using the Log Notes tab, add a Log Note and change the status to "Sent to Sub Contractor".
12. Save the Work Order.
13. Wait for the return of the asset from the Sub Contractor and update the Notes field on the Sub Contractor / Estimate tab as necessary.
14. When Asset is returned from the Sub Contractor, open the Work Order and add a Log Note changing the Status to "Returned from Sub Contractor".
15. Select the Sub Contractor tab and complete the information:
 - a. Sub Cont Cost – the amount the lab is charging the customer
 - b. Sub Cont Lab Cost – the amount the lab paid Sub Contractor
 - c. Sub Cont Hours – if you will be tracking internally the hours related to this Sub Contracting event enter them here
16. Select the Service tab.
 - a. Select the Procedure Used if necessary.
 - b. The Data Sheet will typically be blank.
 - c. Attach the Report returned from Sub Contractor using the Labor/Files tab. This file should be not marked "Private". Therefore, in Customer Portal, the Customer will be able to view and print the certificate.
 - d. If the customer has been invoiced, use the Labor/Files tab and attach the Invoice marking this file as private. This invoice is from the Sub Contractor stating the amount due for the work they performed.
 - e. Continue filling in the all information on the Service tab making sure to complete the Service Date and Due Date.
 - f. If you are outsourcing your own equipment, the Sub Cont Lab Cost may not be applicable.
17. Follow your standard metrology practices filling in the data on the remaining tabs. The Notes field on the Notes tab can be utilized for ISO accredited or anything specific to this Asset.
18. Save the Work Order.
19. When you are ready to Return the asset, enter a Log Note changing the Status to Complete.
20. Use the Return button to return the Asset which is now ready for Shipping.
21. If not already invoiced, follow normal business process to Invoice the customer.

Customer Portal

The Customer Portal add-on is for the Servicing Facility to allow their customers to track Assets, status of work, recalls and to view and print certificates. The Customer Portal has the same look and feel as MET/TEAM except the information is mostly view only and limited for customers.

To login to the Customer Portal, a user must be associated with a contact. Refer to the [Setup Menu Contacts submenu](#).

Customer Portal and Windows Authentication

The use of Windows Authentication with Customer Portal is driven by the System Default [Login – Use Windows Authentication](#). Refer to the section [MET/TEAM and Windows Authentication](#) to understand how your system must be setup to work with Windows Authentication.

- If the System Default *Login – Use Windows Authentication* is active and the System Default Value is set to 2, Customer Portal uses Windows Authentication. The user logging in must be associated with a Contact and the user's MET/TEAM username must match their Windows username.
- When Windows Authentication is **not active**, the MET/TEAM Customer Portal Log-In screen is displayed when the MET/TEAM Customer Portal icon is selected from the user's desktop or the URL is entered into a Web browser.
- When Windows Authentication is **active**, the MET/TEAM Customer Portal Log-In screen is **not** displayed when the MET/TEAM Customer Portal icon is selected from the user's desktop or the URL is entered into a Web browser. The Customer Portal main screen is displayed.

Replacing the Fluke Calibration logo on the Customer Portal Login screen

Out of the box, the Customer Portal web site includes the Fluke Calibration logo on the login screen. This logo may be changed to your company's logo following the instructions below.

1. Create a file with your own company's logo. This file must be a GIF file 205 pixels wide by 85 pixels high.
2. Name the file **customer_portal_logo_205w_x_85h.gif**.
3. Copy this file into the Customer Portal web site's folder. **%IIS_ROOT%\CustomerPortal\Content\images**, replacing the existing file. By default, the **%IIS_ROOT%** folder is typically **C:\inetpub\wwwroot**. If the installation of Customer Portal was customized the folder may be different.

Using Group Security in Customer Portal

The MET/TEAM Customer Portal application can be customized such that fields and check boxes are visible in MET/TEAM but not in MET/TEAM Customer Portal.

Each field contains a property called **Visible** which is set by right clicking on the label of the field. The **Visible** property causes the field to be visible or invisible in both views.

The security of each field and checkbox can be assigned based on Groups. A field and checkbox can be hidden by selecting whether or not it is visible through **Control Security**. **Control Security** is set by right clicking on the label of the field or checkbox. To hide fields and checkboxes only in Customer Portal, assign each Customer Portal user to a specific group and then use **Control Security** to block the use of certain fields.

The MET/TEAM application ships with a group that can be used for Customer Portal. The name of the group is "Customer Portal".

Steps for Customizing Customer Portal

To customize Customer Portal, perform the following steps.

1. Log into the MET/TEAM application as a user that belongs to the Administrator Group.
2. You can either use the group "Customer Portal" that exists in MET/TEAM or create your own Customer Portal group.
 - a. To create a group:
 - i. Select the Groups menu option from the Configure menu.
 - ii. On the Find screen, select the "+" button to display the New Security Group screen.
 - iii. Type in a Group Name (i.e. My Portal Group)

- iv. Select the Save button.
- v. Select the Close button to exit the Edit Group screen.

NOTE: To prevent unauthorized access to MET/TEAM, the default “Customer Portal” group, by itself, does not have access to login to MET/TEAM, only Customer Portal.

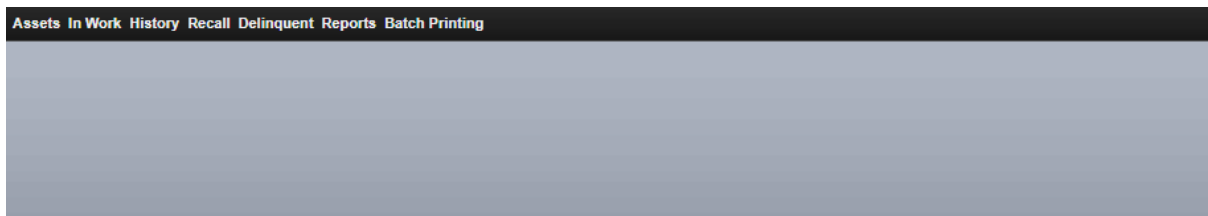
3. Create or edit a User for Customer Portal.
4. Associate the new Group or the standard “Customer Portal” Group to the User.
5. Create a Contact and associate it to the corresponding User.
6. For all fields or checkboxes that need to be secured, right click on a field label or checkbox text and select the Edit Control Security option.
7. On the Edit Control Security screen check all Groups except for the Customer Portal group that you assigned to the User.
8. Select the Save button.

You are now ready to login to Customer Portal. Login into the MET/TEAM Customer Portal as this User. Go to the screen with the secured fields and notice the field is not visible.

For complete details on Customizing the MET/TEAM User Interface, refer to the section “Customizing the User Interface”.

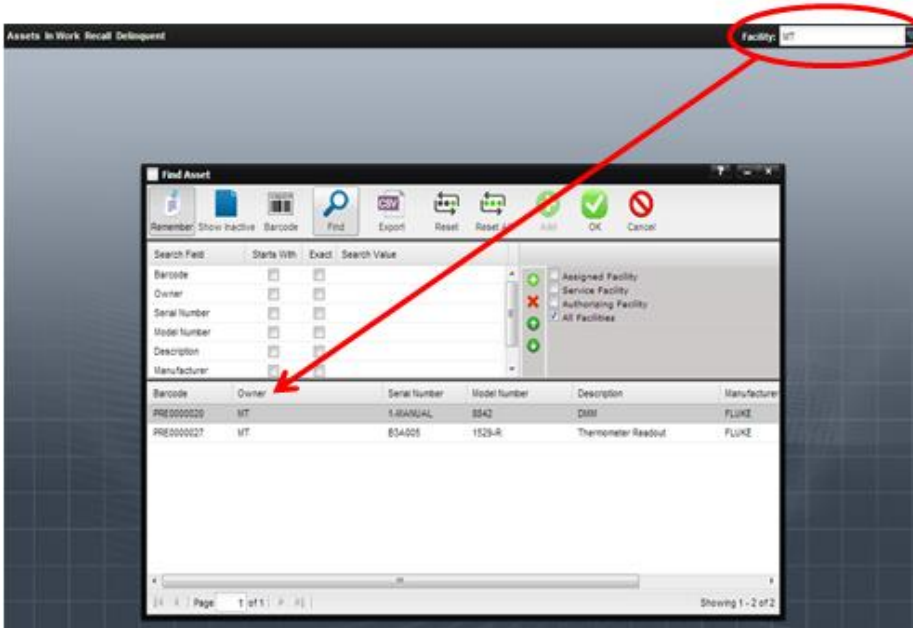
Customer Portal Menu

The Customer Portal menu contains options for viewing Assets, viewing Work Orders that are “in work”, viewing the recall and delinquent list, and viewing Reports.



Customer Portal Assets

The Assets menu option begins by displaying the Find Asset screen for selecting the Asset that the user wants to view. The Assets displayed are only those that are *owned by the Facility displayed in the Facility dropdown in the top right corner of the application.*



To “export” a list of your Assets, select the Print button. A file in .CSV format is created and can be opened. For optimal compatibility, a tab character is used as the delimiter in the .CSV file.

	Barcode	Owner	Serial Number	Model Number	Description	Manufacturer
1	Barcode	Owner	Serial Number	Model Number	Description	Manufacturer
2	1529-001	Fluke - American Fork	B816001	1529	1529 Thermometer Readout	Fluke - American Fork
3	1RX0000007	Fluke - American Fork		1529	1529 Thermometer Readout	Fluke - American Fork
4	TestSD	Fluke - American Fork	2	1529	1529 Thermometer Readout	Fluke - American Fork
5	1529-Parent	Fluke - American Fork		1529	1529 Thermometer Readout	Fluke - American Fork
6	1529-001B	Fluke - American Fork	2	1529	1529 Thermometer Readout	Fluke - American Fork
7	1RX0000009	Fluke - American Fork	2	1529	1529 Thermometer Readout	Fluke - American Fork

Select the Find button, highlight the Asset you are interested in and select the OK button to view information about the Asset.

The View Asset screen is displayed.

Asset Tab

The Asset tab contains general information about the Asset.

View Asset - PRE0000078, PRE0000078

Find Save Cancel Close

Asset Asset Characteristics History / Notes Files

Identification

ID: PRE0000078 Customer: My Lab
Barcode: PRE0000078 Department: My Department
Serial Number: Parent

☒ Active
☐ Recalled Asset
☐ On Site
☐ Not Tracked
☐ Optional

Next Services

Due Date	Service Type	Service Date	Interval	Service Mode	Active
No records to display.					

Physical Location

General

Disposition	Purchase Date	In Service Date	Warranty Date	Date Inventoried	Inventoried By
In Service					

Asset

Description: Wireless K-Type Temperature Module
Model Number: CNX t3000
Manufacturer: Fluke

Management

Assigned Facility	Assigned Contact
Service Facility	Assigned Number
Cal Lab Inc	
Authorizing Facility	Assigned Date
Group	Optional 1

Assignment

There are two editable fields on the Asset tab: Disposition and Asset Physical Location. By default, Customer Portal users can change the values of these fields for their own assets. After changing a value, select the Save button to save the change, or select the Cancel button to cancel the change.

Identification Section

- **ID** – An identifier that can be used to find the Asset.
- **Barcode** – The unique identifier for the Asset. No two Assets can have the same barcode.
- **Serial Number** – The manufacturer's serial number.
- **Customer** – The company or entity that owns the Asset.
- **Department** – The department where this Asset belongs.
- **Parent** – If not empty, indicates this Asset is part of a system or a child of another Asset.
- **Physical Location** – The last known physical location of the Asset. This field is editable and can be updated by Customer Portal users.
- **Active** – If checked, the Asset is actively being used. Some Assets may be recalled but are not currently in the actively used Asset list.
- **Recalled Asset** – If checked, the Asset is included on the recall reports.
- **On Site** – If checked, the Asset maintenance is performed on site.
- **Not Tracked** – If checked, the Asset is not tracked as a part of MET/TEAM. This Asset would not show up on recall reports. The Asset would just exist in the system but not be accounted for. This usually pertains to expendable items such as screws, nuts/bolts, rubber gloves or un-serialized Assets such as desks, chairs, file cabinets, etc.
- **Optional** – A check box that can be customized for a specific use, by changing its label.

General Section

- **Disposition** – The current status of the Asset. This field is editable and can be updated by Customer Portal users.
- **Purchase Date** – The date the Asset was purchased.

-
- **In Service Date** – The date the Asset was made active and placed into service.
 - **Warranty Date** – The date the warranty for this Asset expires.
 - **Date Inventoried** – The date the Asset was last inventoried.
 - **Inventoried By** – The person who last inventoried this Asset.

Next Services Section

- **Due Date** – The date the Asset is due for maintenance.
- **Service Type** – The service that is expected to be performed on or before the Due Date.
- **Service Date** – The date the service was last performed.
- **Interval** – Indicates the service interval.
- **Service Mode** – The service type to be performed.
- **Active** – Indicates if service is active.

Asset Section

- **Asset Description** – The description of the Asset.
- **Model Number** – The manufacturer's model designation of the Asset's characteristics and capabilities.
- **Manufacturer** – The company that created the Asset.

Management

- **Assigned Facility** – The Facility that assigns the Assets work. This Facility schedules this Asset as a part of the work load for itself or another Facility.
- **Service Facility** – The Facility that performs the service.
- **Authorized Facility** – The Facility that authorized the funding for the work to be done on this Asset.
- **Group** – Used for reporting purposes and allows this Asset to be grouped with other Assets.
- **Assigned Contact** – The name of the contact this Asset is assigned to.
- **Assigned Number** – The assignment number of this Asset.
- **Assigned Date** – The date the Asset was assigned to the group.
- **Optional 1** – A character entry field that can be customized for a specific use, by changing its label.

The **Assignment button** is used to view the Tool Assignment for this Asset. See Tool Assignment for a description of this functionality.

Asset Characteristics Tab

The Asset Characteristics tab displays additional information that can be collected for the Asset.

View Asset - PRE0000078, PRE0000078

Find Save Cancel Close

Asset **Asset Characteristics** History / Notes Files

Asset

Stock Number
534

Size
15x25x32

Category (Asst)

Precision RO

Sub Category (Asst)

Family

Readouts

Class
N/A

Item Cost
22,570.00

Replace Cost
22,570.00

Weight
42

Weight UOM
lbs

Dimensions
15.25.32

Quantity
1

EX Data

Property	Value
ExlField4	No
IField5	No
cField2	
cField3	
cField4	
cField14	
cField17	
cField1	

Asset Characteristics and Extended Data is viewable from this tab.

- **Stock Number** - The stock number of the Asset.
- **Size** - The size of the Asset.
- **Category (Asst)** – The general category of the Asset.
- **Sub Category (Asst)** – The sub category of the category for this Asset.
- **Family** – Specifies like data for one or more Assets.
- **Class** - Another field to specify like data for one or more Assets.
- **Item Cost** – The purchase price of the Asset at the time of purchase.
- **Replace Cost** – The cost required to replace the Asset.
- **Weight** – The physical weight of the Asset.
- **Weight UOM** – Unit of measurement for the weight.
- **Quantity** – The quantity of items contained in this Asset. Allows for grouping Assets in a set.
- **Dimension** – The physical dimension of the Asset.
- **EX Data** – Extended data associated with the Asset.

History / Notes Tab

The History / Notes tab displays the service history and notes associated with the Asset.

View Asset - PRE0000078, PRE0000078

Find Save Cancel Close

Asset Asset Characteristics **History / Notes** Files

History

Closed Date	WO Results	Initial Condition	Service Type (W...	Status	Service Date	Due Date	Work Order Number	Working Lab
08/06/2021	Pass		Calibration	Closed	08/06/2021	08/06/2022	2021000041	My Lab
08/06/2021	Pass		Calibration	Closed	08/06/2021	08/06/2022	2021000038	My Lab
08/05/2021			Calibration	Closed	08/05/2021	08/05/2022	2021000032	My Lab
08/05/2021	Pass		Calibration	Closed	08/05/2021	08/05/2022	2021000031	My Lab
08/05/2021			Calibration	Closed	08/05/2021	08/05/2022	2021000030	My Lab
08/05/2021			Calibration	Closed	08/05/2021	08/05/2022	2021000029	My Lab
08/05/2021			Calibration	Closed	08/05/2021	08/05/2022	2021000028	My Lab
08/04/2021	Pass		Calibration	Closed	08/04/2021	08/04/2022	2021000025	My Lab

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No records to display.

Notes

Accuracy Notes

Uncertainty Notes
Keeps its Cal

Warranty Info
Out of Warranty

Notes

History Section

This grid shows all service events (Work Orders) recorded against this Asset. To view the event, double click the selected history event and the associated Work Order is opened. All history events are read only and cannot be changed by the user. See the "In Work (Customer Portal)" section of this manual for details regarding information on the page that opens, because they are the same.

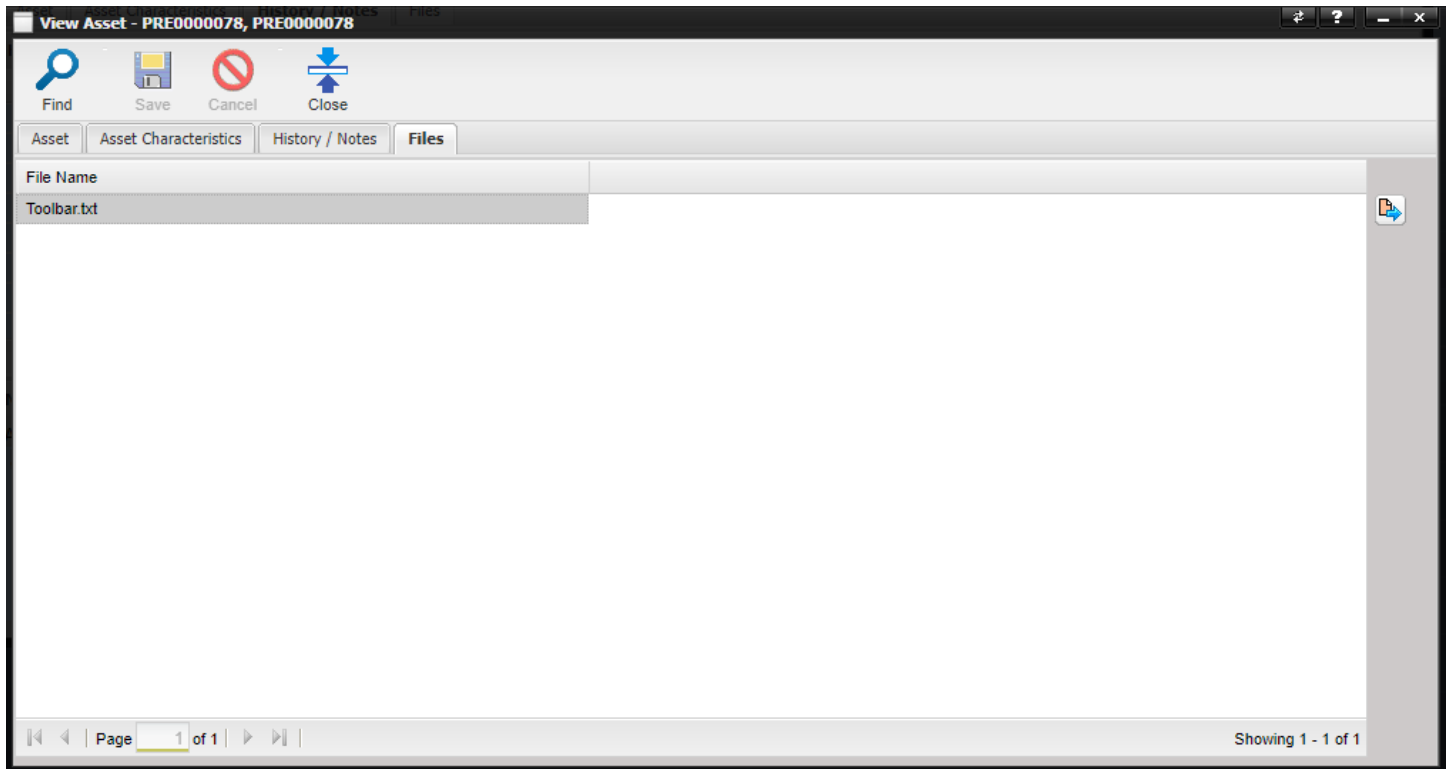
Notes

The Notes section contains information related to accuracy, uncertainty, warranty, and general notes.

- **Accuracy Notes** – Notes specific to instrument accuracy.
- **Uncertainty Notes** – Notes specific to instrument uncertainty.
- **Warranty Info** – Warranty information for this Asset.
- **Notes** – These are general notes for this Asset.

Files

To open the file in its native application, highlight the File and select the Quick Link button at the right of the screen.



Customer Portal In Work

The In Work menu option begins by displaying the Find Open Work Order dialog for selecting the Work Order that the user wants to view. The Work Orders displayed are based on the Customer and are only work orders in process.

Find Open Work Order

Remember

Barcode

Find

Export

Reset

Reset All

OK

Cancel

Search Field	Starts With	Exact	Between	Search Value
Open Date	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Barcode	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Serial Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Asset Model Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Asset Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Open Date	Barcode	Serial Number	Asset Model Number	Asset Description	Work Order Number	Service Type (WO)
09/14/2015	PRE0000015	BC022015	1594A	Thermometer Readout	2015000012	Calibration

<

>

Page

1 of 1

Showing 1 - 1 of 1

Select the Find button, highlight the Asset you are interested in and select the OK button.
The View Work Order dialog is displayed.

View Work Order

Find Cert Close

Barcode 5500A-101	ID 5500A-101	Customer Cal Lab Inc	Service Type (WO) Calibration	Status In Work
Model Number 5500A	Serial Number 101	Department	QC Approved By	QC Approved Date
Manufacturer Fluke	Authority Default	Job Number 2021-001CL	Working Lab My Lab	Administrative Lab My Lab
Description Calibrator	Contact Info			

Service Extended Data Log Notes Labor / Files Standards / Accreditations Notes Parts

Required Date 07/26/2021	Priority 3	Open Date 07/12/2021	Service Date 07/12/2021	Interval 12	UOM Months	Due Date 07/12/2022
-----------------------------	---------------	-------------------------	----------------------------	----------------	---------------	------------------------

Work Order Number 2022000014	Certification Number 2022000014	Default Procedure FundingExample	<input type="checkbox"/> On Site <input type="checkbox"/> Expedite <input type="checkbox"/> Sub Contracted <input type="checkbox"/> ISO Cert <input type="checkbox"/> Cancelled <input type="checkbox"/> Received OOT <input type="checkbox"/> Return No Maint <input type="checkbox"/> Rejected <input type="checkbox"/> Optional 1 <input type="checkbox"/> Optional 2
Sticker Type Calibration	Procedure Used FundingExample	Initial Condition In Tolerance	
Cert Format calcert.rpt	Reason for Service Normal Cycle	Temperature 24	
Assigned Tech John Doe		Humidity 21	
Technician John Doe		Pressure	
Work Area Electronic			


Asset Data

The Asset Data is all the information pertaining to the Asset itself.

- **Barcode** – The *unique* identifier for this Asset. No two Assets have the same barcode.
- **ID** – An identifier that can be used to find the Asset.
 - The Asset can be viewed by selecting the Quick Link button.
- **Model Number** – The manufacturer's model designation of the Asset's characteristics and capabilities.
- **Serial Number** – The manufacturer's serial number for this Asset.
- **Manufacturer** – The Company that created the Asset.
- **Authority** – Describes the source (ownership) of this type allowing for more than one data authority to exist.
- **Description** – The description of the Asset.
- **Customer** – Indicates the owner of the Asset when the Work Order was processed.
- **Service Type (WO)** – Shows the service performed which affects which validations run when saving and closing a Work Order.
- **Status** – Displays the current status of the Work Order.
- **Department** – Indicates the department of the Asset when Work Order was processed.
- **QC Approved By** – The QA person who reviewed and approved this service event.
- **QC Approved Date** – The date the QA person reviewed this service event.
- **Job Number** – The job number that all expenses are charged to.
- **Working Lab** – The lab that performed the work.
- **Administrative Lab** – The lab administratively responsible for the Work Order.
- **Contact Info** – Additional information for the Work Order that may not be on the facility record or may be a one-time piece of information.

Service Tab

The Service Tab displays all the information related to the service that was performed and the procedure used.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts
Required Date 07/26/2021	Priority 3	Open Date 07/12/2021	Service Date 07/12/2021	Interval 12	UOM Months	Due Date 07/12/2022
Work Order Number 2022000014	Certification Number 2022000014	Default Procedure FundingExample		<input type="checkbox"/> On Site <input type="checkbox"/> Expedite <input type="checkbox"/> Sub Contracted <input type="checkbox"/> ISOCert <input type="checkbox"/> Cancelled <input type="checkbox"/> Received OOT <input type="checkbox"/> Return No Maint <input type="checkbox"/> Rejected <input type="checkbox"/> Optional 1 <input type="checkbox"/> Optional 2		
Sticker Type Calibration		Procedure Used FundingExample				
Cert Format calcert.rpt	Initial Condition In Tolerance	Temperature 24				
Assigned Tech John Doe	Reason for Service Normal Cycle	Humidity 21				
Technician John Doe		Pressure				
Work Area Electronic						

- **Required Date** – Date the customer requested the Asset to be back.
- **Priority** - The priority of the Asset in service.
- **Open Date** – Date the Work Order was opened.
- **Service Date** – Date the maintenance was completed.
- **Due Date** – Date the Asset is next due for this type of service.
- **Work Order Number** – The system generated number for this Work Order. This number is unique throughout the data and is used to track all information about this Work Order.
- **Certification Number** – The certificate number for the calibration.
 - To print a certificate of calibration, use the “Cert” button on the toolbar.
- **Sticker Type** – The type of sticker placed on the Asset after the service is complete.
 - To view the sticker text, select the Quick Link button.
- **Cert Format** – Can contain the report file name for this calibration.
- **Assigned Tech** – The technician assigned to do the service.
- **Technician** –The technician of record for this service event.
- **Work Area** – The area of the lab where the service is being performed.
- **Default Procedure** – The name the procedure recommended for this type of service.
- **Procedure Used** - The name of the procedure the technician used for this Work Order.
- **Initial Condition**-The condition the Asset was in when received.
- **Reason for Service**-The reason the Asset is in for service.
- **Temperature** – The atmospheric temperature at the time the service was performed.
- **Humidity** – The atmospheric humidity at the time the service was performed.
- **Pressure** – The barometric pressure at the time the service was performed.
- **Interval** – The interval of when the next service should be performed.
- **UOM** – The unit of measure for the interval.
- **On Site** – Indicates the service was done or needs to be done on site.
- **Expedite** – Indicates the Asset needs to be expedited through the service process.
- **Sub Contracted** – Indicates this service should be subcontracted.
- **ISOCert** – Indicates the Asset requires an ISO or Accredited certificate.
- **Cancelled** – The Service Facility cancelled this Work Order.
- **Received OOT** – Indicates that an Out of Tolerance condition exists with this Asset.

- **Return No Maint** – Indicates the Asset owner requested the Service facility to close the Work Order and have the Asset *returned with no maintenance* being performed.
- **Rejected** – Indicates that as a result of this Work Order, the Asset was rejected.

Extended Data Tab

The Extended Data tab displays the extended data elements for Work Order.

Property	Value
TUR Limit (C2315)	
OOT Limit (C2317)	
Tolerance Referenc...	
Pass 100 (C2319)	No
Revision (C2321)	
Out of Cal Standard...	No
Marginal Tests (C23...	
Notify User Tests (C...	
Failed Tests (C2352)	
Adjustment Tests (C...	
Procedure End Time...	

- **Closed Date** – Date the Work Order was closed.
- **Invoice Number** – Displays the Invoice number this Work Order was billed on.
 - Use the print button to print the invoice.
- **Cost** – Cost of the service.
- **Returned By** – Displays the name of the person who performed the return process.
- **Returned Date** - Displays the date the Asset was returned to the customer.
- **Category (WO)** – The category of the labor.
- **Sub Category (WO)** – The subcategory of the labor.
- **Quantity** – The quantity of items being serviced in the Work Order.
- **EX Data** - The data elements that are added by the user.

Log Notes Tab

The Log Notes tab displays all the activity logged against an Asset. The log is read from top to bottom with the newest event being at the top.

Note: Labor records are not displayed in Customer Portal. Only File records are displayed.

To open the file in its native application, highlight or double click the File and select the Quick Link button at the bottom of the screen.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts
---------	---------------	-----------	----------------------	----------------------------	-------	-------

Labor			Files
Date	Time	Initials	File Name

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No records to display.

No records to display.

The Standards/ Accreditations tab is for recording standards and accreditations associated with the Work Order.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts			
Standards						Accreditations			
Barcode	ID	Serial Number	Model Number	Due Date	Service Date	Number	Name	Type	

The History menu option begins by displaying the Find Closed Work Orders dialog for selecting the closed Work Order that the user wants to view. The Work Orders displayed are based on the Customer. The History option is like the In Work option except the find screen only shows closed work orders.

Recall is used to review and produce customer recall reports. Recall reports can be printed, emailed, or published on the web based on a date range.

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Customer Portal Delinquent

Delinquent is used to review and produce customer delinquent reports. Delinquent reports can be printed, emailed, or published on the web based on a date range.

The screenshot shows a web application window titled "Delinquent". It has a toolbar with "Refresh", "Print", and "Close" buttons. Below the toolbar are two date input fields: "Start Date" (01/01/1950) and "End Date" (08/23/2012). The main area contains a table with the following data:

Due Date	Owner	ID	Description	Model Number	Serial Number	Manufacturer	Location	On Site	Service Type	Barcode
09/21/2005	My first customer	SAMPLE-11	DIGITAL MULTIMETER	11	1100110001	FLUKE	Quality room	<input type="checkbox"/>	Calibration	SAMPLE-11
03/02/2007	METTRACK IMPORT	SAMPLE-5700	CALIBRATOR	5700A	57000001	FLUKE		<input checked="" type="checkbox"/>	Calibration	SAMPLE-5700
03/09/2007	METTRACK IMPORT	SAMPLE-5500	CALIBRATOR	5500A	4820000	FLUKE		<input checked="" type="checkbox"/>	Calibration	SAMPLE-5500

At the bottom, there is a pagination bar showing "Page 1 of 1" and "Showing 1 - 3 of 3".

Customer Portal Reports

The *Reports* menu provides access to a number of printable reports with information of interest to customers using the Customer Portal application. The available reports are displayed on the screen. When a report is printed, the report opens in a new browser tab or new window. Depending on which browser you use, the title may be different. In all instances, the browser attempts to assign a title based either on the report name or the MET/TEAM URL that was invoked to generate the report.

Customer Portal Reports Directory

Reports printed directly from a screen in Customer Portal are referred to as system reports. These are located in the reports system directory set up in system defaults.

Note: *These reports should never be moved to the Reporting\Customer Portal directory.*

System Default Setting

Reports - Default System directory

Reports Path

C:\inetpub\wwwroot\CustomerPortal\Reporting\System\

Reports accessible from the Customer Portal *Reports* menu item are located in the reports directory set up in system defaults:

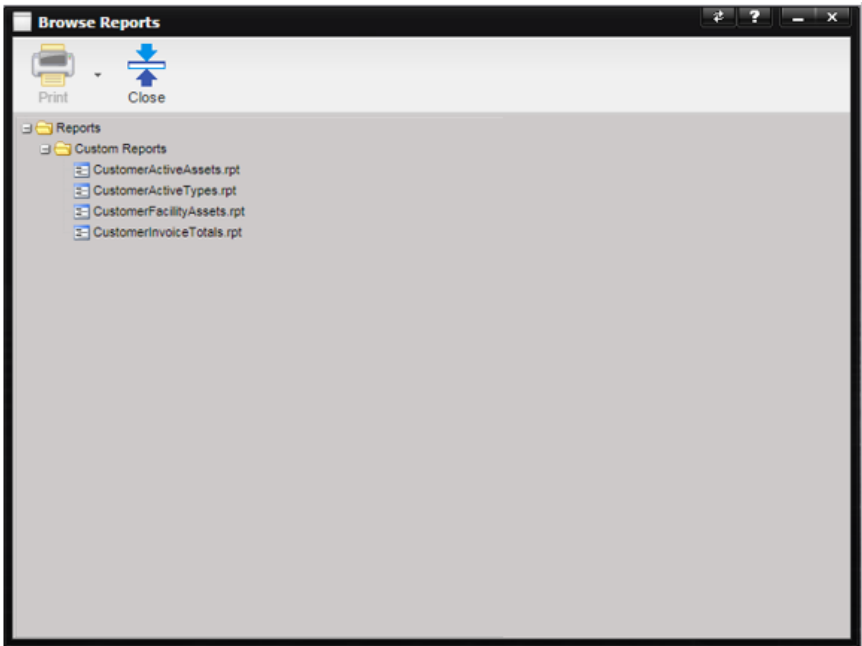
System Default Setting

Reports - Default Reports directory

Reports Path

C:\inetpub\wwwroot\CustomerPortal\Reporting\Customer Portal\

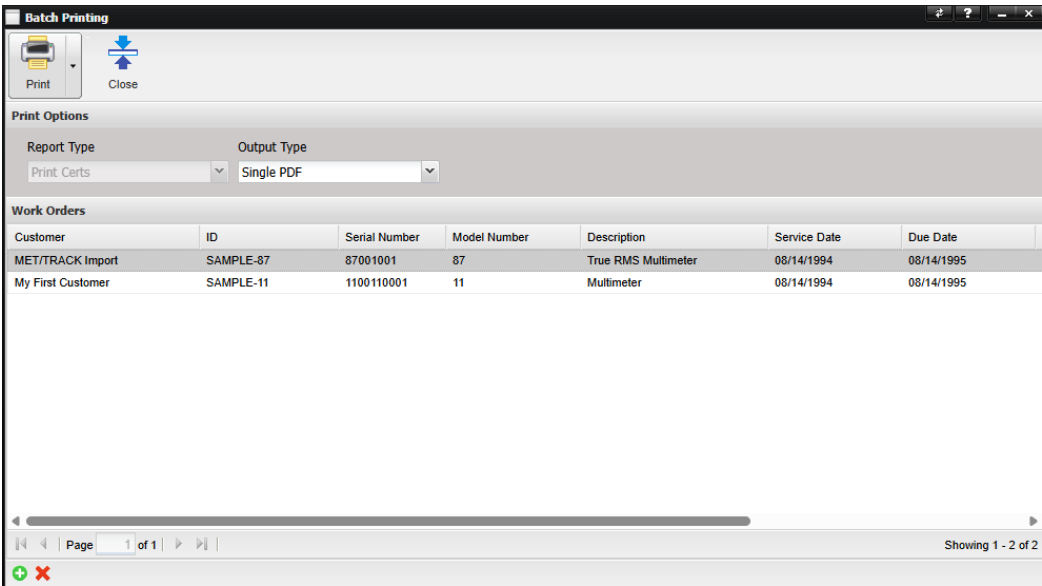
If you want Customer Portal users to be able to print additional reports, simply copy the Crystal Report file to the directory indicated by the "Reports – Customer Portal reports directory" system default setting on the server that is hosting the Customer Portal web site.



Customer Portal Batch Printing

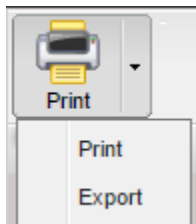
The Batch Printing option allows Customer Portal users to generate certificates for multiple closed work orders at once. Customer Portal users cannot batch print certificates for open work orders. The certificates and the filenames are managed by each of the Work Orders.

The output is a combined PDF or compressed archive (ZIP) of individual PDFs.



Report Type – The type of report is read-only with Print Certs as the selection.

Output Type – The output file type is dependent on the selection made when the down arrow next to the Print button is selected.



- **Print** - a single PDF (all reports combined into one PDF) or to a ZIP file (each report is a separate PDF).
- **Export** – a ZIP file (each report is a separate XLS).

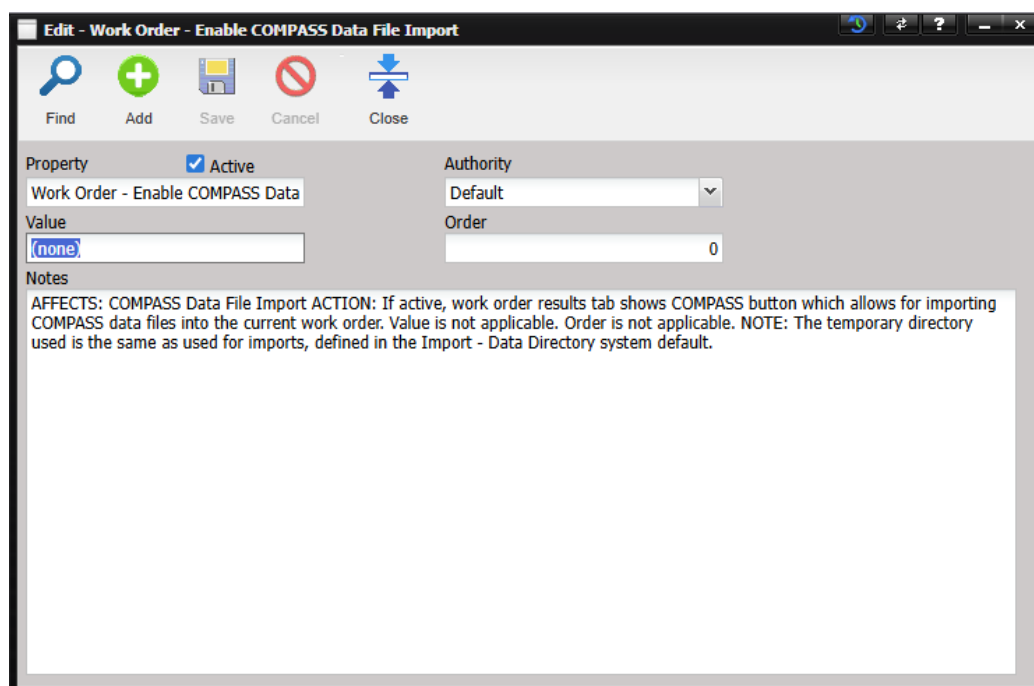
The Work Order information is displayed in the grid. To add Work Orders, use the “+” button at the bottom of the grid. Use the “X” button to remove a Work Order from the list.

COMPASS Data File Import

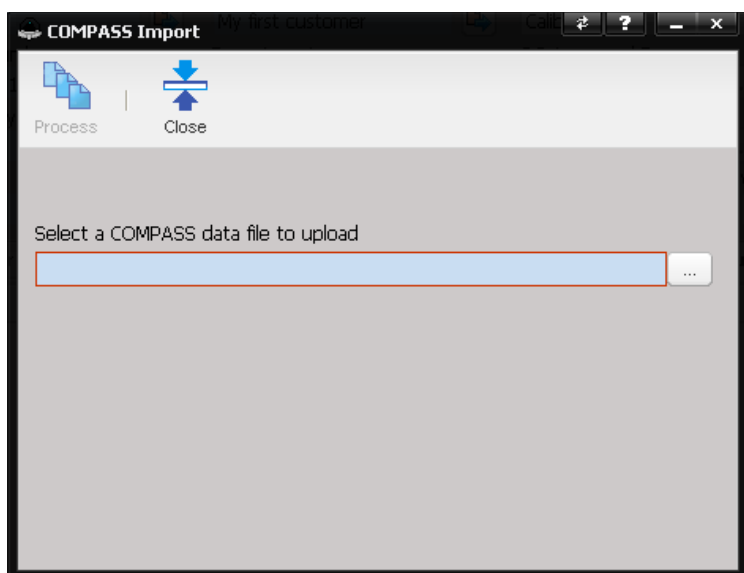
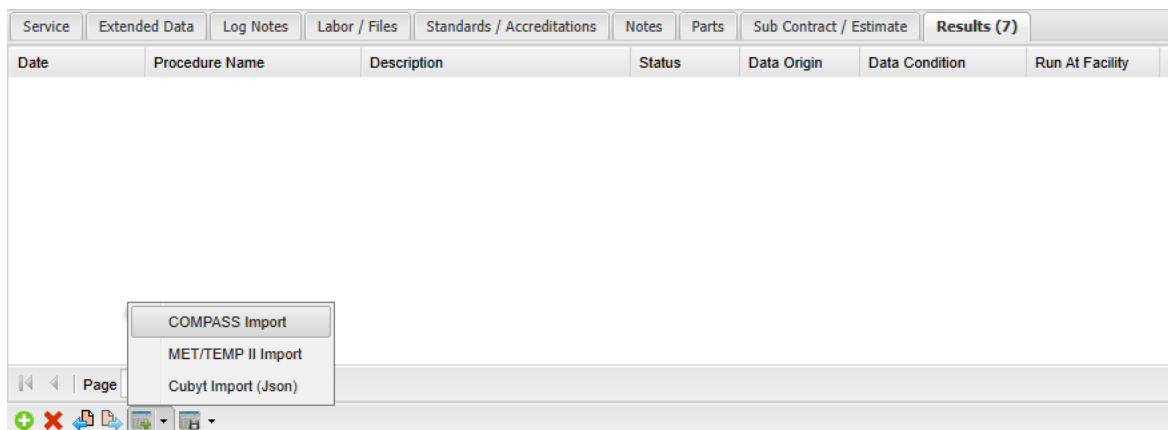
The COMPASS Data File import option is provided to allow MET/TEAM users to import data collected by COMPASS for Pressure or COMPASS for Flow directly into a MET/TEAM Work Order. COMPASS does not interact with MET/TEAM at any point in the process. Only the resultant data is imported. To properly link COMPASS devices with MET/TEAM assets, the COMPASS user should ensure that the DUT (device under test) and Reference Identification fields in COMPASS correspond to the barcode field of active MET/TEAM assets. When the fields differ, a warning is displayed during the import process. Other than ensuring that this common identifying field is the same, there are no other special operations required of the COMPASS operator.

The imported data file generates a new set of Work Order Results that can be viewed using the MET/TEAM Results viewer. Any references or support devices in the COMPASS data file that have valid MET/TEAM barcodes are automatically added as standards associated with the Work Order.

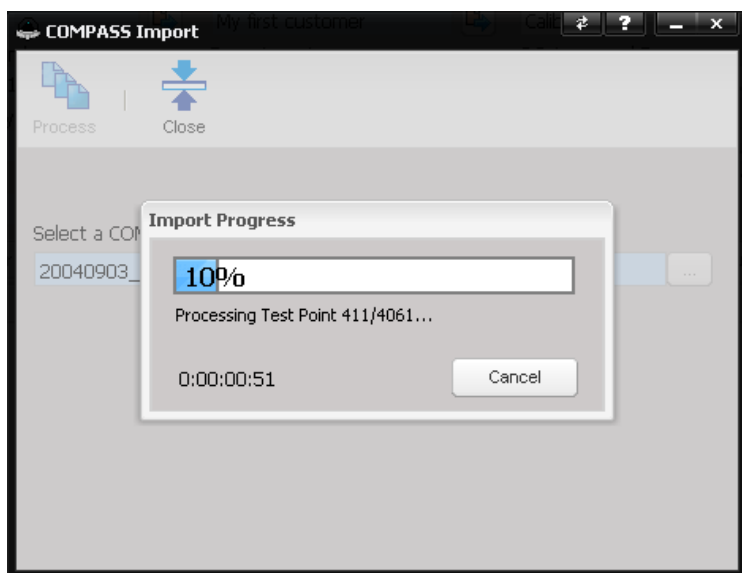
The COMPASS Import option is available on the Results tab of MET/TEAM Work Orders. As a result an asset must be received and a Work Order must exist before the import can be used. The System Default, Work Order - Enable COMPASS Data File Import must also be active to enable the option. The value field associated with the System Default does not apply.



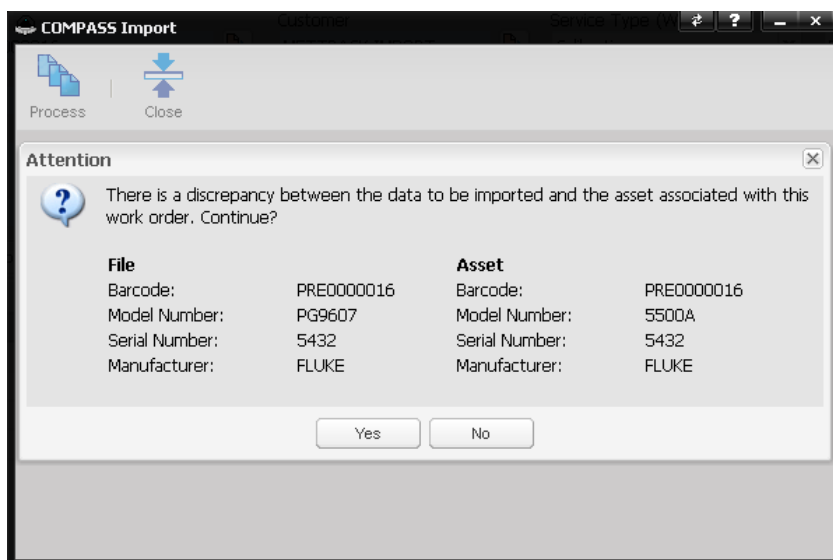
To import data press the COMPASS Import button on the bottom of the Results tab. A prompt is displayed to allow the data file to be selected. Press the ellipsis button and navigate to the desired COMPASS data file.



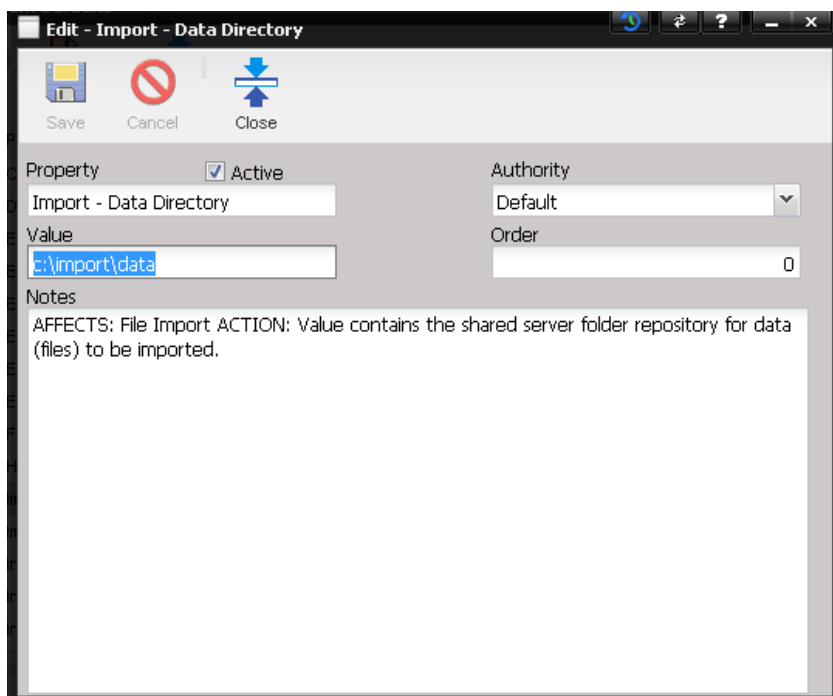
Press the Process button to import the selected file. A progress bar is displayed to show the current state of the import. Data files that have hundreds to test points may take a couple of minutes to process.



If there is a discrepancy between the data in the file and the asset associated with the current work order, a confirmation message is displayed. Review the discrepancy and press No to abort and choose a separate data file or press Yes to continue ignoring the discrepancy.



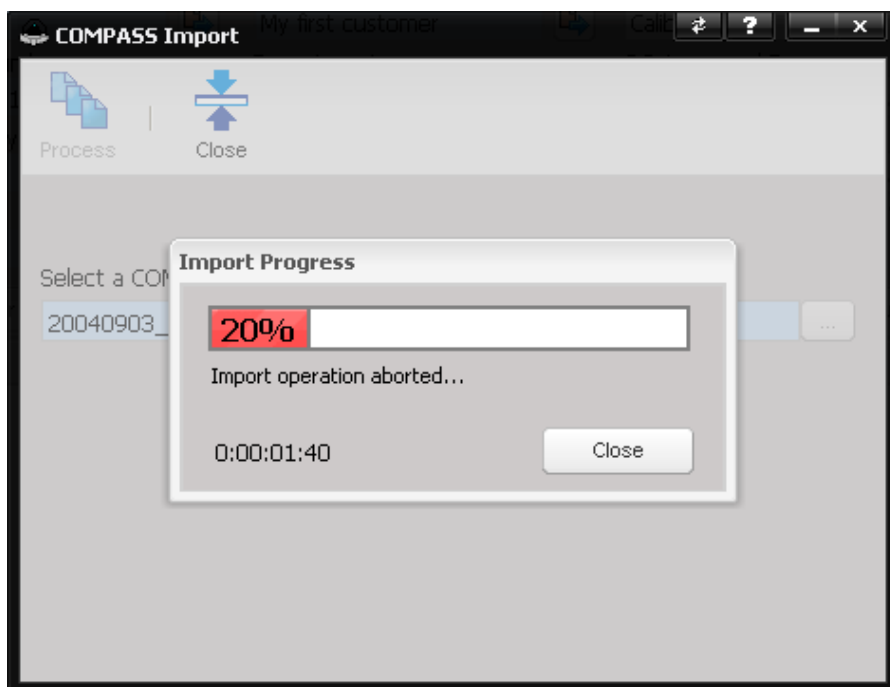
The file to be processed is uploaded to the server, into the same directory used for MET/TEAM imports, which is defined in system defaults.



If the directory is not valid, a prompt to open system defaults is displayed.



If the import is canceled, the points processed up to that point are present in the database. They can be removed by deleting the work order result that was created for this import.



Viewing COMPASS Results

The COMPASS results are best viewed using the COMPASS Data results view on the MET/TEAM Results Viewer.

View Results 2024000016-Service AMH-38, Gauge, QRPT Premium VOC

Navigation icons: MET/CAL Results, MET/CAL Classic, Meas Uncertainty, Procedure Steps, Full Data, COMPASS Data, MET/TEMP II Data, Cubyt Data, Extended Data, Edit, Close.

Metadata fields:

- Description: Service AMH-38, Gauge, QRPT Premium VOC
- Date: 12/16/2024
- Procedure: COMPASS Import
- Technician: [Empty]
- Status: Fail
- Notes: [Empty]
- Failed: 2
- Ordinal: 8
- Data Origin: Import
- Run At Facility: [Empty]
- Workstation Name: OEMComputer
- Data Condition: As Found

Point	Elapsed Time	Status	Set Pt Temp	Fnl Pt Temp ...	Set Pt Line P...	Fnl Pt Line P...	Set Point	Ambient Pres...	Ambient Temperat...	Ambient Humi...	Set Time	Averaging Ti...	Op
1		Fail					0.000000 kPa	97.2605 kPa	23.870 C	17.0 %RH			
2		Pass					7.500000 kPa	97.2648 kPa	23.970 C	17.0 %RH			
3		Pass					15.000000 ...	97.2676 kPa	23.905 C	17.0 %RH			
4		Pass					22.500000 ...	97.2712 kPa	23.890 C	17.0 %RH			
5		Pass					30.000000 ...	97.2743 kPa	23.870 C	17.0 %RH			
6		Pass					15.000000 ...	97.2741 kPa	23.930 C	17.0 %RH			
7		Fail					0.000000 kPa	97.2736 kPa	25.570 C	17.0 %RH			

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COMPASS Data File to MET/TEAM Mappings

The following table describes the mappings from the COMPASS data files into the MET/TEAM database. The MET/TEAM Table / Field column represents the MET/TEAM database table and field. The Origin / Value column represents the COMPASS data file element or a fixed value that is written to the indicated field. The Remarks column identifies any special rules associated with the particular data element.

MET/TEAM Table / Field	Origin / Value	Remarks
CallSheetResults		
IRun	-1	
cDescription	TestHeader.Label	
cWorkstationName	GeneralHeader.StationID	
cDataOrigin	Import	
cStatus	<calculated>	pass/fail
cCallSheetResultType	As Found	
nRunAtFacilityUID	Null	
nProcedureUID	COMPASS Import	
nTechnicianUID	GeneralHeader.UserID	
nCallSheetResultOrdinal	<calculated>	row count
CallSheetResultEx		
cField001	DUT.Identification	
cField002	DUTRaw1.Identification	
cField003	DUTRaw2.Identification	
cField004	DUTRaw3.Identification	
cField005	Ref.Identification	
cField006	RefRaw1.Identification	
cField007	RefRaw2.Identification	
cField008	RefRaw3.Identification	
cField009	AmbPres.Identification	
cField010	AmbTemp.Identification	
cField011	AmbRH.Identification	
cField012	GeneralHeader.UserID	technician
cField013	ID000501	test label
cField014	ID001003	customer id
cField015	DUT.CalibrationCoefficient1	
cField016	DUT.CalibrationCoefficient2	
cField017	DUT.CalibrationCoefficient3	

cField018	DUT.CalibrationCoefficient4	
cField019	DUT.CalibrationCoefficient5	
cField020	DUT.CalibrationCoefficient6	
mField003	100001=Point 100002=Date 100003 =...	headers
CallSheetStandardLink		
nAssetUID	DUTRaw1.Identification	
nAssetUID	DUTRaw2.Identification	
nAssetUID	DUTRaw3.Identification	
nAssetUID	Ref.Identification	
nAssetUID	RefRaw1.Identification	
nAssetUID	RefRaw2.Identification	
nAssetUID	RefRaw3.Identification	
nAssetUID	AmbPres.Identification	
nAssetUID	AmbTemp.Identification	
nAssetUID	AmbRH.Identification	
Points		
nPointOrdinal	<calculated>	row count
cPointDescription	ID100010	cardinal point
tPointDateTime	ID100002 + ' ' + ID100003	point date/time
nCardinalPoint	ID100010	cardinal point
nReference	ID200002	reference
nUUT	ID300002	dut
cPointPassFailStatus	<calculated>	from ID100005
nUUTRange	ID300004-ID300003	max-min
cPointLabel	Numeric	
PointAmbients		
nAmbientPressure	ID100011	ambient pressure
nAmbientTemperature	ID100012	ambient temperature
nAmbientHumidity	ID100013	ambient humidity
PointExStrings		
cField009	ID100001	test point

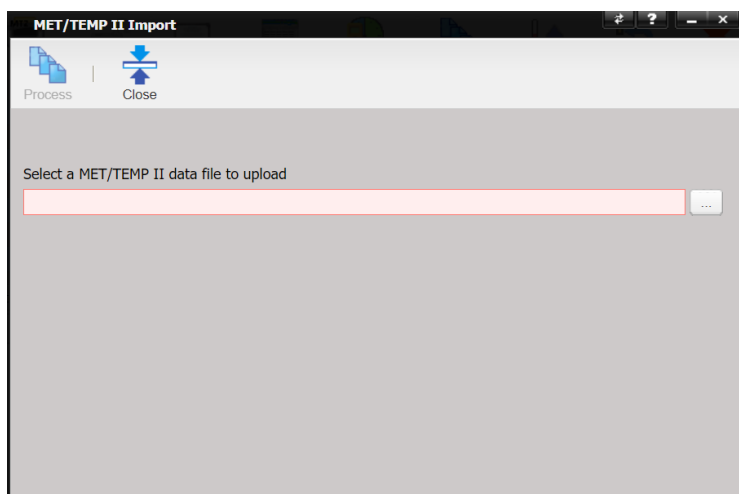
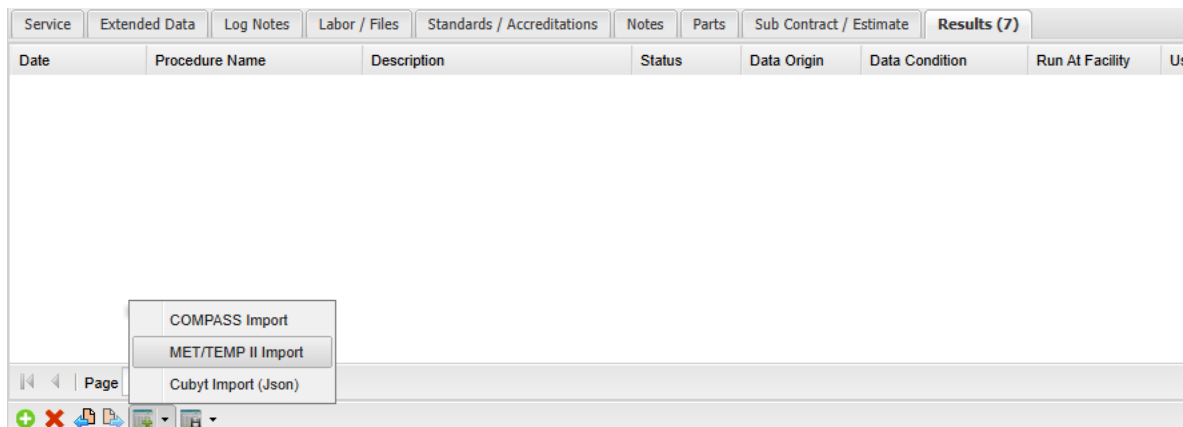
cField021	ID100006	SetPointTemperature
cField022	ID100007	Final Temp Out
cField023	ID100008	SetPointLinePressure
cField024	ID100009	Final Line Pressure
cField025	ID410501	String Data 1
cField026	ID410502	String Data 2
cField027	ID410503	String Data 3
cField028	ID410504	String Data 4
cField029	ID410505	String Data 5
cField030	ID410506	String Data 6
cField031	ID410507	String Data 7
cField032	ID410508	String Data 8
cField033	ID410509	String Data 9
cField034	ID410510	String Data 10
PointExNumerics		
nField006	ID300002-ID200002	deviation (dut-ref)
nField010	ID200002	reference
nField027	ID300007	DUT Raw Output 1
nField029	ID300002	dut
nField031	ID400001	Aux Raw1
nField032	ID400002	Aux Raw Fn1
nField033	ID400003	Aux Raw2
nField034	ID400004	Aux Raw Fn2
nField035	ID400005	Aux Raw3
nField036	ID400006	Aux Raw Fn3
nField037	ID400007	Aux Raw4
nField038	ID400008	Aux Raw Fn4
nField039	ID400009	Aux Raw5
nField040	ID400010	Aux Raw Fn5
nField041	ID400011	Aux Raw6
nField042	ID400012	Aux Raw Fn6
nField043	ID400013	Aux Raw7
nField044	ID400014	Aux Raw Fn7
nField045	ID400015	Aux Raw8

nField046	ID400016	Aux Raw Fnl8
nField047	ID400017	Aux Raw9
nField048	ID400018	Aux Raw Fnl9
nField049	ID400019	Aux Raw10
nField050	ID400020	Aux Raw Fnl10
nField051	ID410001	User Defined1
nField052	ID410002	User Defined2
nField053	ID410003	User Defined3
nField054	ID410004	User Defined4
nField055	ID410005	User Defined5
nField056	ID410006	User Defined6
nField057	ID410007	User Defined7
nField058	ID410008	User Defined8
nField059	ID410009	User Defined9
nField060	ID410010	User Defined10
PointTolerances		
cToleranceReference	ID200015	ref tol
nError	ID301002	error
nReadingErrorPercent	ID301003	rel err
nTolerance	ID301004	tolerance
nToleranceNegative	ID300002-ID301004	dut-tol
nTolerancePositive	ID300002+ID301004	dut+tol
PointStatistics		
nNumberOfSamplesUUT	ID300005	number of measurements
nUUTStandardDeviation	ID300006	standard deviation
INoisy	<calculated>	from ID100005
IReliable	<calculated>	from ID100005
PointExLogicals		
IField001	0	corr flag
IField002	-1	measurement flag
PointUncertainties		
nLowerLimit	ID200002-ID301004	ref-tol

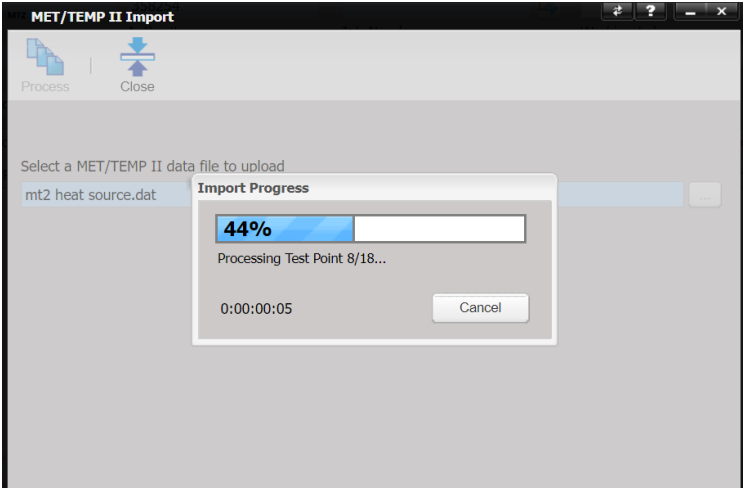
nUpperLimit	ID200002+ID301004	ref+tol
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MET/TEMP II Data File Import

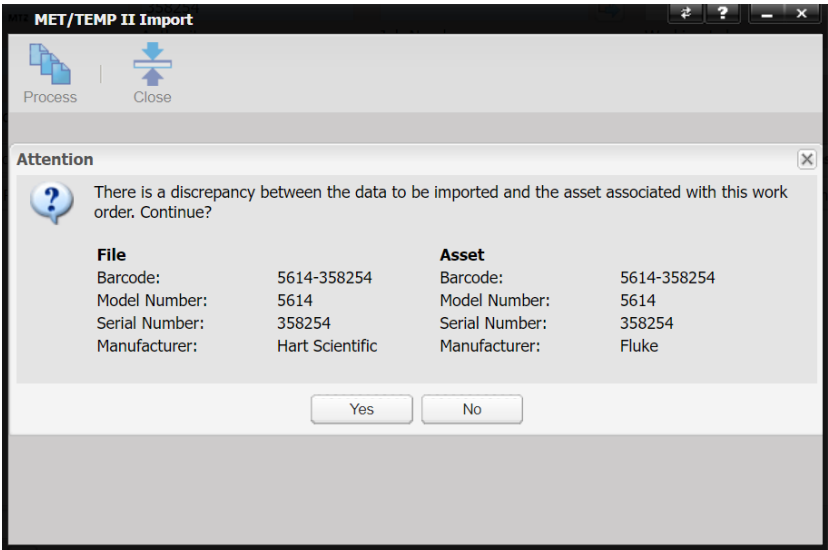
The MET/TEMP II Import option is available on the Results tab of MET/TEAM Work Orders. As a result, an asset must be received and a Work Order must exist before the import can be used. To import data, press the MET/TEMP II Import button at the bottom of the Work Order Results tab. A MET/TEMP II Import prompt is displayed to select a data file. Press the ellipsis button and navigate to the desired MET/TEMP II data file.



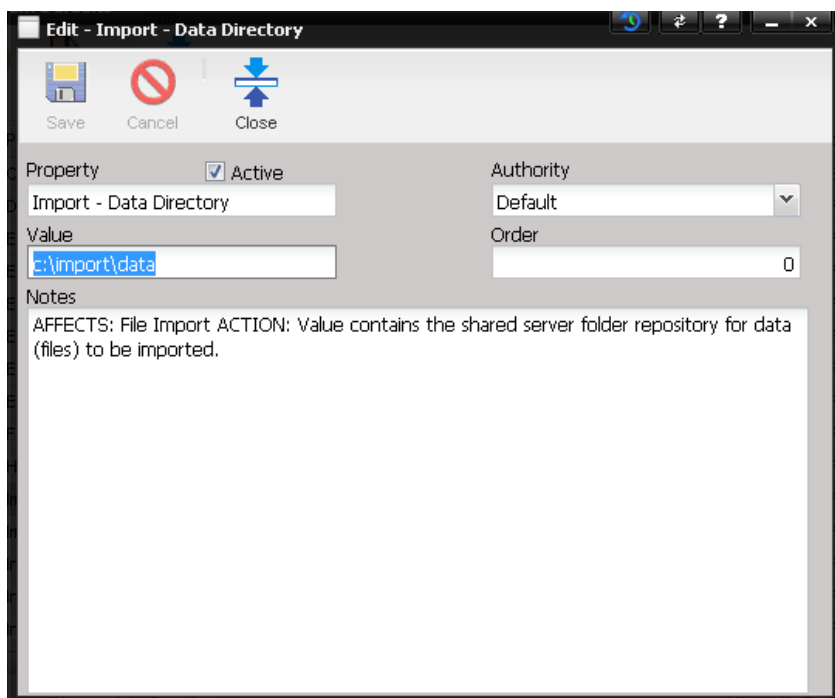
Press the Process button to import the selected file. A progress bar is displayed to show the current state of the import.



If there is a discrepancy between the data in the file and the asset associated with the current work order, a confirmation message is displayed. Review the discrepancy and press No to abort import process or press Yes to continue, ignoring the discrepancy.



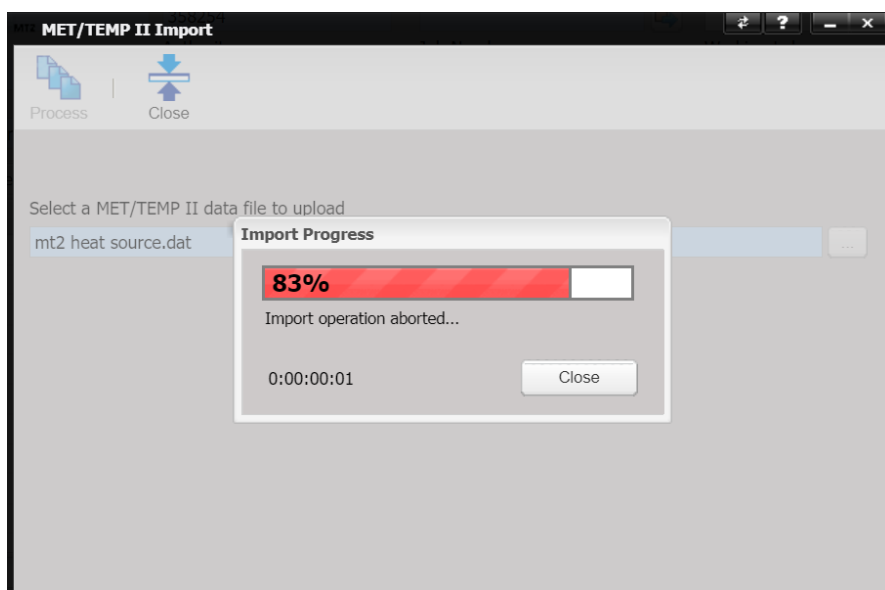
The file to be processed is uploaded to the server, into the same directory used for MET/TEAM imports, which is defined in system defaults.



If the directory is not valid, a prompt to open system defaults is displayed.



If the import is canceled, the points processed up to that point are present in the database. They can be removed by deleting the work order result that was created for this import.



After a successful import, imported probe data generates a new set of Work Order Results and for heat source calibration data, an As Found and an As Left set of results get created. Up to 15 References from the MET/TEMP II data file, that have a valid MET/TEAM barcode and an acceptable service date, are automatically added as standards associated with the Work Order. MET/TEMP II imported results can be viewed using the MET/TEAM Results viewer.

Exporting MET/TEMP II Calibration Data

A feature was added to MET/TEMP II V5.2, which allows data to be exported to a file. The contents of the file is formatted so that MET/TEAM can import directly into a Work Order's results. There is not any direct interaction between MET/TEMP II and MET/TEAM at any point in the process.

MET/TEMP II Test Equipment

To properly link MET/TEMP II equipment with MET/TEAM assets, ensure that the DUT (device under test) and test equipment **MT Asset** fields in MET/TEMP II correspond to the barcode field of active MET/TEAM assets. To set the barcode in MET/TEMP II, select the **Utilities | Edit Test Information** menu option. With **Edit Test information**, use the **Select Database Table** dropdown to select the appropriate table. For reference equipment, use the TestEquipment table. For DUT equipment, use the TestProbeEquipment table. For either option, locate the correct record and scroll right to the **MT Asset** field. Enter the appropriate MET/TEAM barcode into this field.

MET/TEMP II Technicians

To properly link MET/TEMP II technicians to the MET/TEAM work order results, ensure a user exists in MET/TEAM with the username that matches the MET/TEMP II technician name. If the technician already exists in MET/TEAM but the name does not match the username, select the **Utilities | Edit Test Information** menu option. With Edit Test information, set **Select Database Table** dropdown as TestStart. Locate the correct record and update the technician name to match the existing MET/TEAM username.

To export test results for use in MET/TEAM, select the **Export Calibration Data for MET/TEAM** option from the **Utilities** menu. With **Export for MET/TEAM**, highlight the results to be exported. Select the Export button to display a Save As dialog. Navigate to the appropriate folder and enter the filename.

Viewing MET/TEMP II Results

The MET/TEMP II results are best viewed using the MET/TEMP II Data results view on the MET/TEAM Results Viewer.

View Results 2024000016-TEST_PROC

MET/CAL Results MET/CAL Classic Meas Uncertainty Procedure Steps Full Data COMPASS Data **MET/TEMP II Data** Cubyt Data Extended Data Edit Close

Description: TEST_PROC Date: 12/17/2024 Procedure: MET/TEMP II Import Technician: Status: Pass Notes:

Failed: 0 Ordinal: 0 Data Origin: Import Run At Facility: Workstation Name: Data Condition: As Found

Point	Status	Setpoint	Reference	DUT	DUT Std Dev	Ref Std Dev	Error	Uncertainty	Tolerance	Tolerance Neg	Tolerance Pos	Lower Limit	Upper Limit
1		-38.83 C	-38.72545 C	21.51032 Ohms	0.0387	0.0342		0.0500 C					

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MET/TEMP II Data File to MET/TEAM Mappings

The following table describes the mappings from the MET/TEMP II data files into the MET/TEAM database. The MET/TEAM Table / Field column indicates the MET/TEAM database table and field. The Origin / Value column represents the MET/TEMP II data file column header name or value. The Remarks column identifies any special rules associated with the particular data element.

MET/TEAM Table / Field	Origin / Value	Remarks
CallSheetResults		
IRun	-1	
cDescription	[TEST INFORMATION] Procedure	
cWorkstationName	<blank>	
cDataOrigin	Import	
cStatus	<calculated>	pass/fail
cCallSheetResultType	As Found / As Left	As Found for Probe data; As Found and As Left for Heat Source calibration data
nRunAtFacilityUID	Null	
nProcedureUID	MET/TEMP II Import	
nTechnicianUID	[TEST INFORMATION] Technician	

nCallSheetResultOrdinal	<calculated>	row count
mNotes	[TEST NOTES]	
CallSheetResultEx		
cField001	[COEFFICIENT INFO] ConversionType	
cField002	[COEFFICIENT INFO] Range1	
cField003	[COEFFICIENT INFO] Range2	
cField005	[COEFFICIENTS] Name	Place holder
cField006	[COEFFICIENTS] Name	Place holder
cField007	[COEFFICIENTS] Name	Place holder
cField008	[COEFFICIENTS] Name	Place holder
cField009	[COEFFICIENTS] Name	Place holder
cField010	[COEFFICIENTS] Name	Place holder
cField011	[COEFFICIENTS] Name	Place holder
cField012	[COEFFICIENTS] Name	Place holder
cField013	[COEFFICIENTS] Name	Place holder
cField014	[COEFFICIENTS] Name	Place holder
cField015	[COEFFICIENTS] Name	Place holder
cField016	[COEFFICIENTS] Name	Place holder
cField017	[COEFFICIENTS] Name	Place holder
cField018	[COEFFICIENTS] Name	Place holder
cField019	[COEFFICIENTS] Name	Place holder
cField020	[COEFFICIENTS] Name	Place holder
cField021	[COEFFICIENTS] Name	Place holder
cField022	[COEFFICIENTS] Name	Place holder
cField023	[COEFFICIENTS] Name	Place holder
cField024	[COEFFICIENTS] Name	Place holder
cField025	[REFERENCE] Identification	Place holder
cField026	[REFERENCE] Identification	Place holder
cField027	[REFERENCE] Identification	Place holder
cField028	[REFERENCE] Identification	Place holder
cField029	[REFERENCE] Identification	Place holder
cField030	[REFERENCE] Identification	Place holder
cField031	[REFERENCE] Identification	Place holder
cField032	[REFERENCE] Identification	Place holder

cField033	[REFERENCE] Identification	Place holder
cField034	[REFERENCE] Identification	Place holder
cField035	[REFERENCE] Identification	Place holder
cField036	[REFERENCE] Identification	Place holder
cField037	[REFERENCE] Identification	Place holder
cField038	[REFERENCE] Identification	Place holder
cField039	[REFERENCE] Identification	Place holder
cField040	[TEST INFORMATION] Technician	
cField041	[TEST INFORMATION] TestNumber	
cField042	[TEST INFORMATION] ReportNumber	
cField043	[TEST INFORMATION] StartDateTime	
cField044	[TEST INFORMATION] ElapsedTime	
cField045	[TEST INFORMATION] CalRange	
cField046	[TEST INFORMATION] RcvdCondition	
nField005	[COEFFICIENTS] Value	Place holder
nField006	[COEFFICIENTS] Value	Place holder
nField007	[COEFFICIENTS] Value	Place holder
nField008	[COEFFICIENTS] Value	Place holder
nField009	[COEFFICIENTS] Value	Place holder
nField010	[COEFFICIENTS] Value	Place holder
nField011	[COEFFICIENTS] Value	Place holder
nField012	[COEFFICIENTS] Value	Place holder
nField013	[COEFFICIENTS] Value	Place holder
nField014	[COEFFICIENTS] Value	Place holder
nField015	[COEFFICIENTS] Value	Place holder
nField016	[COEFFICIENTS] Value	Place holder
nField017	[COEFFICIENTS] Value	Place holder
nField018	[COEFFICIENTS] Value	Place holder
nField019	[COEFFICIENTS] Value	Place holder
nField020	[COEFFICIENTS] Value	Place holder
nField021	[COEFFICIENTS] Value	Place holder
nField022	[COEFFICIENTS] Value	Place holder
nField023	[COEFFICIENTS] Value	Place holder
nField024	[COEFFICIENTS] Value	Place holder
tField001	[TEST INFORMATION] StartDateTime	

CallSheetStandardLink		
nAssetUID	[REFERENCE] Identification	
Points		
nPointOrdinal	<calculated>	row count
cPointDescription	[TEST DATA] SetPoint	
tPointDateTime	NULL	
nCardinalPoint	[TEST DATA] SetPoint	
nReference	[TEST DATA] Reference	
nUUT	[TEST DATA] DUT	
cPointPassFailStatus	<calculated>	
cPointLabel	Numeric	
cOverrideRemarks	[TEST DATA] StabOverride	“Stability Override” if PointExLogicals.IField004 is True
PointAmbients		
nAmbientTemperature	[TEST INFORMATION] AmbientTemperature	
nAmbientHumidity	[TEST INFORMATION] AmbientHumidity	
PointExStrings		
cField009	<calculated>	Row number
cField015	[TEST DATA] Realization	
PointExNumerics		
nField001	[TEST DATA] RefRaw	
nField010	[TEST DATA] Reference	
nField029	[TEST DATA] DUT	
nField031	[TEST DATA] CJC	
PointTolerances		
nError	[TEST DATA] Error	
nTolerance	[TEST DATA] Tolerance	tolerance
nToleranceNegative	<calculated>	dut-tol
nTolerancePositive	<calculated>	dut+tol

PointStatistics		
nNumberOfSamplesUUT	[TEST INFORMATION] Samples	number of measurements
nUUTStandardDeviation	[TEST DATA] DUTStdDev	
nReferenceRawStandardDeviation	[TEST DATA] RefRawStdDev	
nReferenceStandardDeviation	[TEST DATA] DUTStdDev	
PointExLogicals		
IField001	0	corr flag
IField004	[TEST DATA] StabOverride	Indicate if stability was skipped before taking measurements.
PointUncertainties		
nLowerLimit	<calculated>	ref-tol
nUpperLimit	<calculated>	ref+tol
nUncertainty	[TEST DATA] Uncertainty	ref+tol

Cubyt Data File Import

The Cubyt Import (Json) option is available on the Results tab of MET/TEAM Work Orders. As a result, an asset must be received and a Work Order must exist before the import can be used. To import data, press the Cubyt Import (Json) button at the bottom of the Work Order Results tab. The Cubyt Import prompt is displayed to select a data file. Press the ellipsis button and navigate to the desired Cubyt data file. The file must be exported to a Json file from a Cubyt CAL-SHEET. Other file formats are not supported.

Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (7)
Date	Procedure Name	Description	Status	Data Origin	Data Condition	Run At Facility	User Name	
08/13/2025 12:25	Cubyt Import	AUTO-GENERATED 19D46290-B5D...	Fail	Import	As Left	My Lab	acordner	
08/13/2025 12:26	Cubyt Import	AUTO-GENERATED DCA4B230-1A...	Pass	Import	As Found	My Lab	acordner	
08/13/2025 14:20	Cubyt Import	AUTO-GENERATED D19F4EB0-179...	Fail	Import	Found / Left	My Lab	acordner	
08/13/2025 12:26	Cubyt Import	AUTO-GENERATED DCA4B230-1A...	Pass	Import	As Found	My Lab	acordner	
08/13/2025 12:25	Cubyt Import	AUTO-GENERATED D19F4EB0-179...	Fail	Import	Found / Left	My Lab	acordner	
08/12/2025 17:32	Cubyt Import	AUTO-GENERATED E81C4420-B5...	Fail	Import	As Found	My Lab	acordner	
08/13/2025 14:21	Cubyt Import	AUTO-GENERATED D19F4EB0-179...	Fail	Import	Found / Left	My Lab	acordner	

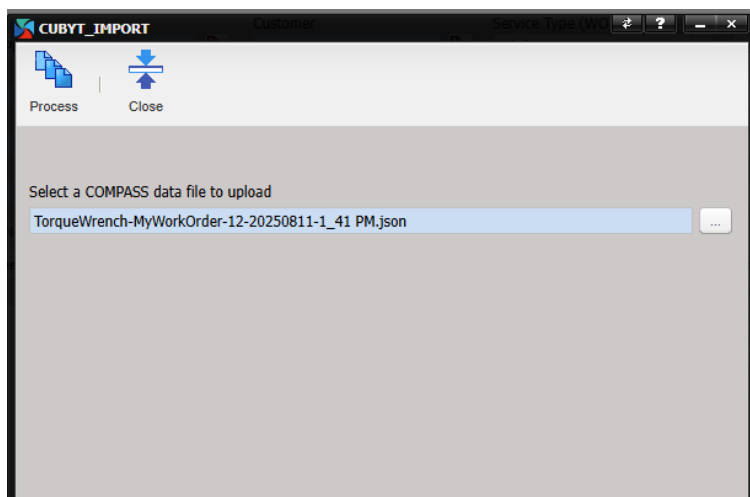
COMPASS Import

MET/TEMP II Import

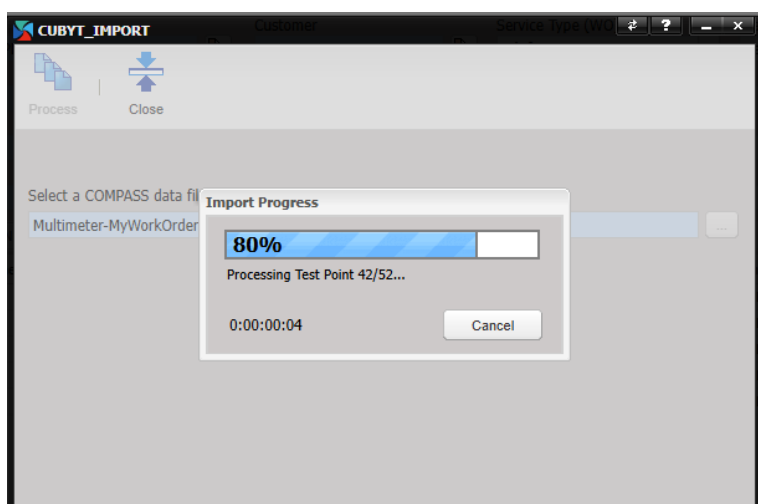
Cubyt Import (Json)

Page

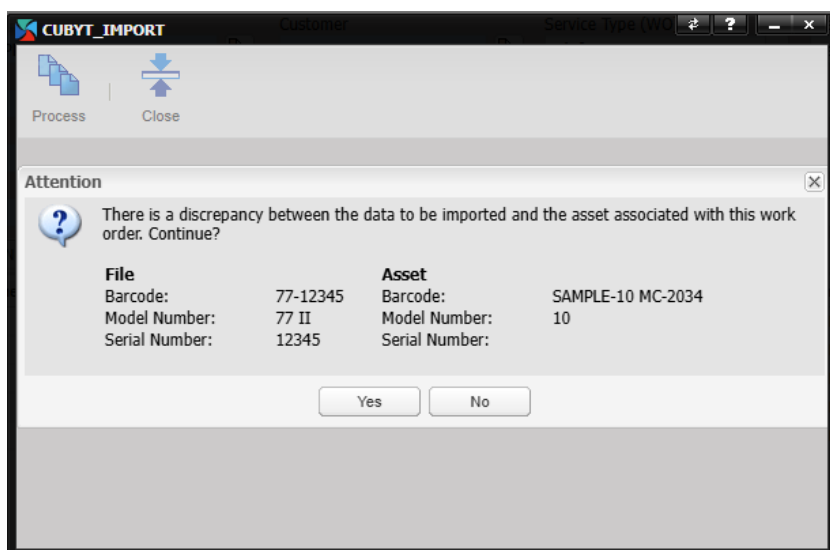
Showing 1 - 7 of 7



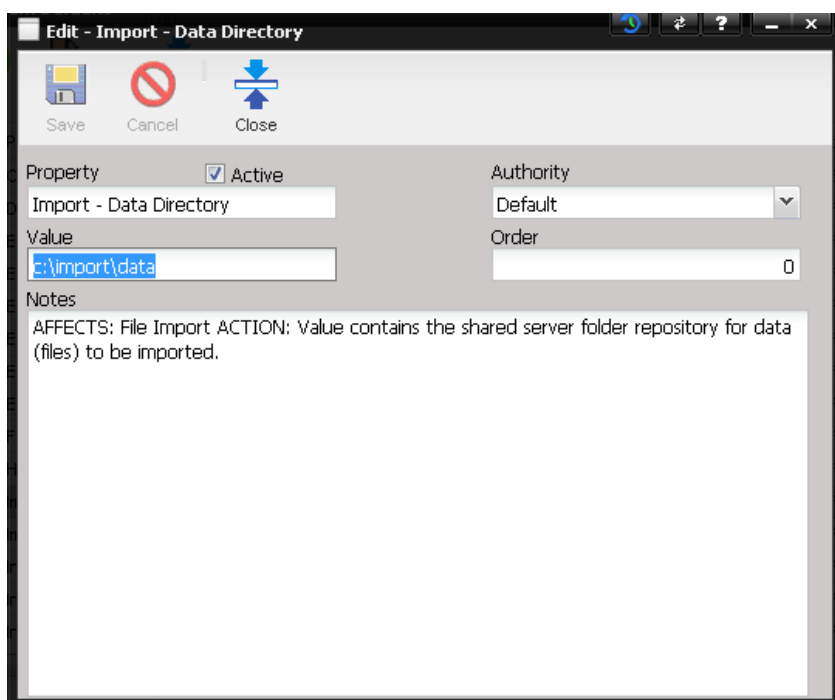
Press the Process button to import the selected file. A progress bar is displayed to show the current state of the import.



If there is a discrepancy between the data in the file and the asset associated with the current work order, a confirmation message is displayed. Review the discrepancy and press No to abort import process or press Yes to continue, ignoring the discrepancy.



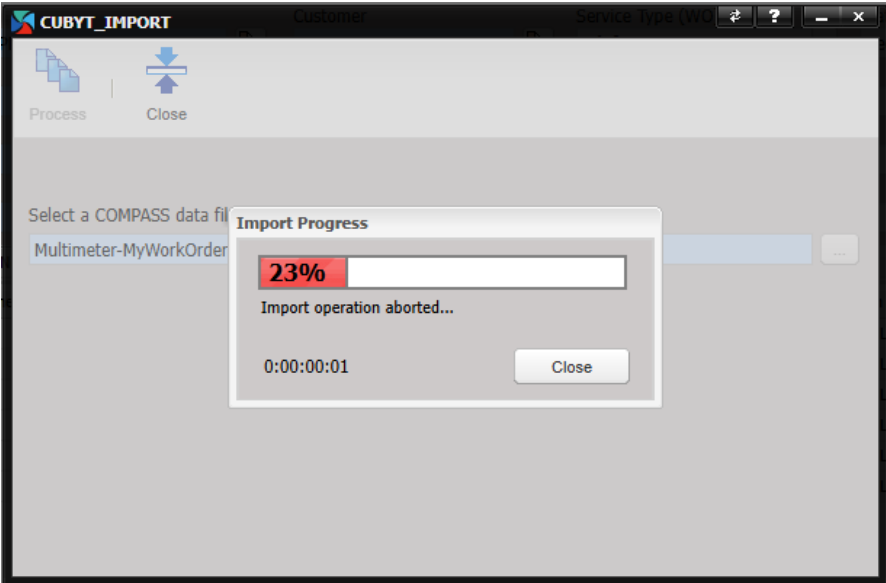
The file to be processed is uploaded to the server, into the same directory used for MET/TEAM imports, which is defined in system defaults.



If the directory is not valid, a prompt to open system defaults is displayed.



If the import is canceled, the points processed up to that point are present in the database. They can be removed by deleting the work order result that was created for this import.



Service	Extended Data	Log Notes	Labor / Files	Standards / Accreditations	Notes	Parts	Sub Contract / Estimate	Results (7)
Date	Procedure Name	Description	Status	Data Origin	Data Condition	Run At Facility		
08/13/2025 12:25	Cubyt Import	AUTO-GENERATED 19D46290-B5D...	Fail	Import	As Left	My Lab		
08/13/2025 12:26	Cubyt Import	AUTO-GENERATED DCA4B230-1A...	Pass	Import	As Found	My Lab		
08/13/2025 14:20	Cubyt Import	AUTO-GENERATED D19F4EB0-179...	Fail	Import	Found / Left	My Lab		
08/13/2025 12:26	Cubyt Import	AUTO-GENERATED DCA4B230-1A...	Pass	Import	As Found	My Lab		

After a successful import, imported data generates a new set of Work Order Results. Cubyt imported results can be viewed using the MET/TEAM Results viewer.

Viewing Cubyt Results

The Cubyt results are best viewed using the Cubyt Data results view on the MET/TEAM Results Viewer.

View Results 2025000101-AUTO-GENERATED D19F4EB0-1791-11EF-8D51-AB2D0A6A0C4F

Description: **AUTO-GENERATED D19F4EB**
 Date: **08/13/2025**
 Procedure: **Cubyt Import**
 Technician: **Alan Cordner (WinAuth)**
 Status: **Fail**
 Notes: **My remarks**

Failed: **4** Ordinal: **0**
 Data Origin: **Import**
 Run At Facility: **My Lab**
 Workstation Name: **Cubyt**
 Data Condition: **Found / Left**

Point	Status	Description	Nominal	Reference	DUT	Tolerance Neg	Tolerance Pos	Lower Limit	Upper Limit	Amb Tempe...	Amb Humidity	Amb Pr...	Samp...
0		Voltage - Direct Curr...											
1		-1000 to 1000 V											
2	Pass	-950 V	-950 V	-950 V	-949 V	-3 V	-3 V	-955 V	-945 V	23 °C	44 %RH	21 kPa	1
3	Pass	0 V	0 V	0 V	1 V	1 V	1 V	-1 V	1 V	23 °C	44 %RH	21 kPa	1
4	Pass	950 V	950 V	950 V	949 V	5 V	5 V	945 V	955 V	23 °C	44 %RH	21 kPa	1
5		-320 to 320 mV											
6	Pass	-300 mV	-300.0 MV	-300.0 MV	-299.9 MV	-0.8 MV	-0.8 MV	-301.0 MV	-299.0 MV	23 °C	44 %RH	21 kPa	1
7	Pass	0 mV	0.0 MV	0.0 MV	0.0 MV	0.1 MV	0.1 MV	-0.1 MV	0.1 MV	23 °C	44 %RH	21 kPa	1
8	Pass	300 mV	300.0 MV	300.0 MV	300.0 MV	1.0 MV	1.0 MV	299.0 MV	301.0 MV	23 °C	44 %RH	21 kPa	1
9		-320 to 320 V											
10	Pass	-300 V	-300.0 V	-300.0 V	-300.0 V	-0.8 V	-0.8 V	-301.0 V	-299.0 V	23 °C	44 %RH	21 kPa	1
11	Pass	0 V	0.0 V	0.0 V	0.0 V	0.1 V	0.1 V	-0.1 V	0.1 V	23 °C	44 %RH	21 kPa	1
12	Pass	300 V	300.0 V	300.0 V	300.0 V	1.0 V	1.0 V	299.0 V	301.0 V	23 °C	44 %RH	21 kPa	1
13		-3.2 to 3.2 V											
14	Fail	-3 V	-3.000 V	-3.000 V	-3.020 V	-0.008 V	-0.008 V	-3.010 V	-2.990 V	23 °C	44 %RH	21 kPa	1

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Double-clicking any row in the grid will display the View Point Readings screen.

View Point Readings AUTO-GENERATED DCA4B230-1A11-11EC-B1B1-4D6678D737CA-90 lbf · ft

Point Ordinal: **2**
 Point Description: **90 lbf · ft**
 Point Pass Fail Status: **Pass**
 Condition:

nReadingOrdinal	cReadingLabel	Measurement	tReadingDateTime	cReadingUnit	cReadingType	cBarcode
0	1	90.0 lbf · ft	08/13/2025	lbf · ft	Cubyt	SAMPLE-10 MC-2034
1	2	90.0 lbf · ft	08/13/2025	lbf · ft	Cubyt	SAMPLE-10 MC-2034
2	3	90.0 lbf · ft	08/13/2025	lbf · ft	Cubyt	SAMPLE-10 MC-2034

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Cubyt Json Data File to MET/TEAM Mappings

The following table describes the mappings from the Cubyt Json data files into the MET/TEAM database. The MET/TEAM Table / Field column indicates the MET/TEAM database table and field. The Origin / Value column represents the Cubyt Json file item. The Remarks column identifies any special rules associated with the particular data element.

MET/TEAM Table / Field	Origin / Value	Remarks
CallSheetResults		
IRun	-1	
cDescription	deviceSpecAndMethodId → calSheetId	
cWorkstationName	Cubyt	
cDataOrigin	Import	
cStatus	calculated based on each testPoints → testFailed	
cCallSheetResultType	summary → productState	
nRunAtFacilityUID	summary → labDetails	Only if matching Facility is found
nProcedureUID	Cubyt Import	
nTechnicianUID	summary → technicianName	Only if matching User is found
mNotes	summary → calNotes	
tStartTime	summary → calibrationDate	
tEndTime	summary → calibrationDate	
Points		
nPointOrdinal	<automatic>	
cPointDescription	parameters → title & functions → title or range → title or testPoints → nominalValue	
nCardinalPoint	testPoints → nominalValue	
nReference	testPoints → appliedValue	If testPoints → na is false
nUUT	testPoints → average	If testPoints → na is false
cPointPassFailStatus	testPoints → testFailed	If testPoints → na is false
cPointLabel	Numeric	
IUUTIsFixed	0	
PointExStrings		

cField009	<automatic>	
PointStatistics		
nNumberOfSamplesUUT	testPoints → numSamples	If testPoints → na is false
PointExLogicals		
lField001	0	corr flag
lField004	0	

The following table indicates records that are created ONLY if **testPoints → na** is false in the Json file:

MET/TEAM Table / Field	Origin / Value	Remarks
PointTolerances		
nToleranceNegative	calculated from: testPoints → nominalValue/toleranceMultiplierNegative / toleranceAddendNegative or testPoints → nominalValue/toleranceMultiplier/ toleranceAddend	
nTolerancePositive	calculated from: testPoints → nominalValue/toleranceMultiplierPositive/ toleranceAddendPositive or testPoints → nominalValue/toleranceMultiplier/ toleranceAddend	
PointUncertainties		
nLowerLimit	testPoints → lowerLimit	
nUpperLimit	testPoints → upperLimit	
PointExNumerics		
nField010	testPoints → appliedValue	
nField029	testPoints → average	

PointAmbients		
nAmbientTemperature	summary → temperature	
nAmbientHumidity	summary → humidity	
nAmbientPressure	summary → pressure	
PointReadings		
nAssetUID	<automatic>	
nReadingOrdinal	<automatic>	
cReadingUnit	testPoints → units	
cReadingLabel	<automatic>	
cReadingType	Cubyt	
tReadingDateTime	summary → calibrationDate	
nReading	testPoints → readings	