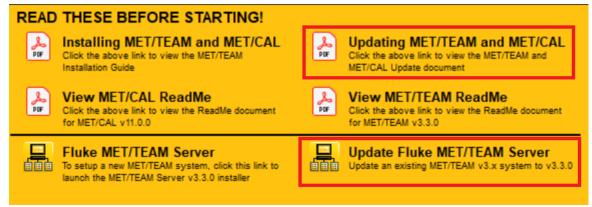


# MET/TEAM 3.3.0 README

This document includes information related to MET/TEAM 3.3.0 relative to version 3.2.0.

If you are updating an existing MET/TEAM installation, you must be running version 3.0.0 or later before updating to version 3.3.0. To update from any previous version 3.x.x, use the MET/TEAM Server Update installer. Be sure to read the *Updating MET/TEAM and MET/CAL* document before attempting to update an existing installation.

The MET/TEAM version 3.3.0 release includes a new version of MET/CAL (v11.0.0).



Use these links when updating from a previous version of MET/TEAM

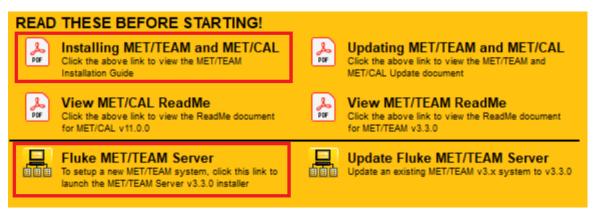
Refer to the table below for the upgrade path to follow when updating from previous versions of MET/TEAM:

If you are currently running	Do the following to update your system
MET/TEAM v3.x.x	- Run the current MET/TEAM Server Update installer to update to v3.3.0.
	Optional: Select to deploy MET/TEAM Customer Portal and/or MET/TEAM API
	if not already deployed on the server
	- Re-request licenses using your current product codes, master code, and/or
	Gold Number
MET/TEAM v2.3.0	- Update your system to v3.0.0 using the MET/TEAM v3.0.0 Server Update
	installer. This will require running the Report Update Tool for any custom
	reports being used
MET/TEAM v2.2.1	- Update your system to v2.3.0 using the MET/TEAM v2.3.0 Server Update
	installer
MET/TEAM v2.2.0	- Update your system to v2.2.1 using the MET/TEAM v2.2.1 Server Update
	installer
MET/TEAM v2.1.2	- Make sure you have applied Update 1 to your system (the Help > About
	screen should indicate v2.1.2.119 or later in the lower left corner
	- Run the Database Update Tool included on the installation media to update
	the database



	- Run the MET/TEAM v2.2.0 Server Update installer - Run the installed Report Update Tool if you have any customized reports
MET/TEAM v2.0.3 to v2.0.6	- Update your system to v2.1.2 and apply Update 1
MET/TEAM v2.0.2 or earlier	- Update your system to v2.0.5 and run the <b>Date Fixer Utility</b> (contact Technical
	Support for a link to download the v2.0.5 distribution media)
	- Then update your system to v2.1.2 and apply Update 1

MET/TEAM requires SQL Server to be installed first. If you have an existing instance of SQL Server 2012 or later (Express or otherwise), then you may use it instead, and skip this step. Make sure the existing SQL Server instance is configured for MET/TEAM according to the information provided in the MET/TEAM Installation Guide. If you are going to use MET/TEAM Mobile, the Mobile workstation must have the same version of SQL Server as the main MET/TEAM server.



Use these links when setting up a new MET/TEAM system

**IMPORTANT:** MET/TEAM is designed to support localized language, date, time and number formats based on the user's browser settings. However, all System Default settings that use an English word in the Value field must never be translated to other languages. Likewise, all System Default settings that expect numeric data in the Value field require the numeric data to be formatted using the English (US) format (using the period "." as the decimal separator). Failure to do this may cause calculation errors when the numeric value is used to perform calculations.

#### WHAT'S NEW IN VERSION 3.3.0?

- Added dedicated configuration screens for MET/TEAM Mobile, Alerting, and Service Types.
- Added the ability to track license usage over time and a default report to evaluate collected data.
- Improved Find Screen functionality, including more available criteria and better implementation of Starts With, Exact, and Between mechanisms.
- Reworked MET/TEAM API endpoints to better reflect the data they provide and be more efficient for integrations with other systems.
- New System Defaults to improve workflows related to MET/CAL labor and Manual Template default selections.
- For a complete list, see the table below



### **NEW INSTALLATIONS**

- Install SQL Server 2012 or later. If you have an existing instance of SQL Server 2012 or later, you may skip this step and use that instance instead. Be sure to follow the instructions in the MET/TEAM Installation Guide to configure SQL Server Logins for MET/TEAM.
- Use the link on the auto-start splash screen to install MET/TEAM Server.

### UPDATING FROM PREVIOUS VERSIONS

Be sure to read the MET/TEAM and MET/CAL Update document for more details on the update process.

- Before starting the update process, you must make sure all MET/TEAM Mobile workstations are
  checked in prior to updating MET/TEAM Server! Any Mobile workstations that are checked out when
  the update is started will not be able to check in once the update is complete!
- Use the link on the auto-start splash screen to launch the MET/TEAM Server Update installer to update an existing system.
- If you have installed MET/CAL on any workstations:
  - Install/update National Instruments NI-488.2 and NI-VISA packages on each MET/CAL workstation using the NI Package Manager utility. Refer to the MET/TEAM Installation Guide or MET/CAL ReadMe file for more details.
  - Run the MET/CAL Client installer on all MET/CAL workstations to update them to the latest version. The MET/CAL Client installer is found in the Installers folder on the MET/TEAM share (typically \\servername>\metteam\Installers\METCAL).
- If you are using MET/TEAM Mobile, run the MET/TEAM Mobile Prerequisites installer on each mobile
  workstation to upgrade to the latest requirements for running MET/TEAM on the mobile workstation. The
  MET/TEAM Mobile Prerequisites installer is found in the Installers folder on the MET/TEAM share
  (typically \\\servername>\metteam\Installers\Mobile).

#### **RUNNING MET/TEAM**

**For new installations:** Once MET/TEAM has been successfully installed, you may access MET/TEAM on the server by double-clicking the shortcut created on the desktop and log in using the following built-in administrator account:

User name: adminPassword: admin

It is highly recommended that you change the password on this built-in administrator account immediately and create individual user accounts for all users of the system.

To access MET/TEAM from other computers on the network, open a web browser and enter the address and port of the web site on the server machine (i.e. http://<server\_name>:<port> or http://<ip\_address>:<port>).



## MET/TEAM 3.3.0 CHANGES

Кеу	Issue Type	Description
MTM-10010	ADDED	Added the ability to update Files during an import.
MTM-10203	ADDED	Changed how service types are added and edited. Replaced the find screen with a list of service types that can be reordered for displaying in drop downs.
MTM-10404	ADDED	Added an option to Data Cleanup for removing records from the LicenseUsageHistory table.
MTM-10444	ADDED	Added Update Date/Time to the Find Files search criteria.
MTM-10504	ADDED	Added a button to launch Batch Printing from the returning screen.
MTM-10554	ADDED	Added the Part Extended Data fields as options on the Find Part screen.
MTM-10574	ADDED	Added License Usage custom report.
MTM-10755	ADDED	Updates were made to allow customizing which columns appears in the My Work Work Orders list. Also, allow reordering the columns. These settings are stored per logged in user.
MTM-10895	ADDED	Added a vertical scroll bar on MET/CAL prompts when the number of fields exceeds the height of the dialog.
MTM-10925	ADDED	Added more validation checks to MET/CAL Prompt screens to prevent entry of invalid values in various fields.
MTM-11055	ADDED	Added IOptional, cOptional1, cAssignedContact and cTyManufacturer (Type manufacturer) to the asset/byfield endpoint



Key	Issue Type	Description
MTM-11125	ADDED	Find screen date fields that are looking for an exact date value now use a calendar control to choose the date.
MTM-11195	ADDED	The cID field is now available for use in MET/CAL Prompts.
MTM-11491	ADDED	All available Type fields are selectable for searching on the find screen.
MTM-11521	ADDED	Added a system default to select if the Manual Template calibration has the default data condition is "As Found" or "Found / Left".
MTM-11531	ADDED	Added the ability to manage whether MET/CAL Labor is added a Work Order and if it is chargeable via a System Default.
MTM-11541	ADDED	Work Order Log Notes now have an end date to use for reporting purposes.
MTM-11700	ADDED	Added all Asset fields to the Select Standards criteria.
MTM-7709	ADDED	New Data Check functions have been added to be able to tell what application is currently running, MET/TEAM, MET/TEAM Mobile, or Customer Portal.
MTM-8666	ADDED	Clearing of the QC Approved fields when a user other than the approver changes a Work Order can now be disabled in system defaults.
MTM-8756	ADDED	Added the Copy feature to the Prompt screen.
MTM-8974	ADDED	The settings for the Alerting Engine have been moved from system defaults to their own separate screen.
MTM-9282	ADDED	Added a System Default setting to determine whether the Receive button on the Edit Asset screen navigates to the Receiving screen so that all Receiving Data Checks will run when receiving the Asset.



Кеу	Issue Type	Description
MTM-9431	ADDED	Added Change Tracking to the Control Security setups.
MTM-9462	ADDED	The ability to filter calendar tasks based on Facilities has been added to the Calendar feature.
MTM-9521	ADDED	Added the ability to use the Control Security options to manage who can create or edit users, allowing groups other than Administrator to do so.
MTM-9549	ADDED	Added the Tool Assignment extended data fields as options on the Select Tool Assignment screen.
MTM-9590	ADDED	Toolbar buttons now show translated text for all supported languages.
MTM-9731	ADDED	Added the ability to import MET/TEMP II data into the Work Order results.
MTM-9762	ADDED	Extended Data for Work Order Results has been added to the Work Order Results Viewer on the Work Order.
MTM-9842	ADDED	The Facility number has been added to the Facilities grid on the contacts screen.
MTM-9912	ADDED	The Work Order results view is automatically selected based on the data selected.
MTM-9990	ADDED	Added a new feature to track license usage over time. Each log in, log off, Mobile Check Out/In, or session timeout causes a set of records to be written to the new LicenseUsageHistory table indicating the current number of licenses of each type in use and total count of licenses.
MTM-10284	CHANGED	When adding fields to a find screen, only "visible" extended data fields are included in the available list.
MTM-10314	CHANGED	In the Calendar, you can now double-click a calendar day to add a task.



Кеу	Issue Type	Description
MTM-10534	CHANGED	All fields from the CallSheetResults table on any MET/CAL Prompt has the Read Only property set to No and the Make Blank property set to Yes and these properties cannot be changed. Existing MET/CAL Prompts that include any such fields are automatically updated to meet this criteria.
MTM-10645	CHANGED	Resolved an issue where the MET/CAL prompt options could get set to invalid states. Now when the Read Only option is set to Yes, the Required and Make Blank settings are set to No and disabled.
MTM-10815	CHANGED	The Add Criteria screen for Find screens is now sorted alphanumerically instead of ASCII sort.
MTM-10935	CHANGED	MET/CAL Prompts display and handle currency fields the same way as the MET/TEAM UI.
MTM-10945	CHANGED	In MET/CAL Prompts, we now have the ability to move rows up/down and the order of the prompt fields are preserved per the display order.
MTM-10985	CHANGED	Find screen search criteria were updated to better reflect the intended purpose of Starts With, Exact, and Between.
MTM-10995	CHANGED	Drastically reduced the time to delete Work Orders.
MTM-11065	CHANGED	The Service Type field on the Add/Edit Scheduled Service screen is now a drop-down list defined in the Setup>Services screen rather than a lookup mechanism.
MTM-11318	CHANGED	Updated Data Cleanup help topic to match current usage.
MTM-11603	CHANGED	Removed the CallSheets.nAllocated from the available Prompt fields.
MTM-11736	CHANGED	Updates for MET/TEAM Mobile using a secure website.



Кеу	Issue Type	Description
MTM-11746	CHANGED	Updated the Ver_8_Cert_Sp stored procedure to include PointExNumerics.cField050 as RunGroupID. This allows report results to be grouped by each run of section procedures.
MTM-11812	CHANGED	Added a Part link to Invoices when included as an item of a Work Order.
MTM-11966	CHANGED	Updated the "Cal Cert w Uncert.rpt" standards Service Date and Due Date to be formatted for the selected locale.
MTM-2364	CHANGED	Added double click support to the Schedule and Contact grids on the Schedule Alert screen.
MTM-5317	CHANGED	Updated all permissions related to MET/CAL Runtime and Editor to be based on a permission granted rather than a specific security group.
MTM-5929	CHANGED	Removed the Recall Escalation feature and related settings and documentation.
MTM-6631	CHANGED	Fixed inconsistencies with tooltip text, some dialog titles, and some icons in the MET/TEAM application.
MTM-6683	CHANGED	Removed deprecated jQuery functions from official data checks.
MTM-7018	CHANGED	Ability to add a new Service Type from the Service Type screen has been added.
MTM-7219	CHANGED	When adding results to a Work Order, the Data Condition is initially set to "As Left" if the Work Order has results already saved. Otherwise, Data Condition is initially set to "As Found".
MTM-7619	CHANGED	Entering a decimal separator on the interval field of the Asset service is now prevented, to avoid issues with invalid (fractional) interval settings.



Кеу	Issue Type	Description
MTM-7669	CHANGED	The Data Condition drop down on the Manual Template Calibration screen now contains the same selection values as are found on the Work Order Result Data Condition drop downs.
MTM-8766	CHANGED	The Prompt Type field on the MET/CAL Prompt find screen is now a drop down.
MTM-8898	CHANGED	Updated the MET/TEAM API structure to better match the structure of data and make it more efficient to use.
MTM-8964	CHANGED	Added security options to the Facility fields on the Recall screen.
MTM-8984	CHANGED	The Data Cleanup Tool is now available in the MET/TEAM Express Edition.
MTM-9015	CHANGED	Updated the Crystal Reports Runtime to Version 13.0.32
MTM-9110	CHANGED	Swapping a standard on a Work Order now also updates the service and due dates associated with it, if applicable.
MTM-9292	CHANGED	Enhanced the functionality of the Add Result toolbar button on the Work Order screen to allow different types of procedures to be used in various orders.
MTM-9381	CHANGED	The Status, Data Condition, and Notes fields on the View Results window no longer require the Edit button to be clicked. Control security can be used to limit access to these fields. By default, members of the Administrator, Configuration, and Edit Results security groups are able to edit these fields.
MTM-9421	CHANGED	A Work Order with a service interval of 0 and None no longer requires a Due Date.



Кеу	Issue Type	Description
MTM-9463	CHANGED	The Manual Template - Template Name field was increased to fully show the name of the manual template.
MTM-9465	CHANGED	Added the Type extended data fields as options on the Find Type screen.
MTM-9569	CHANGED	To resolve security concerns, the messages that allow access to license registration screens and logged in users screen, do not get displayed until valid credentials get entered.
MTM-9812	CHANGED	Resolved an issue for adding standards during a Compass and MET/TEMP II test result import
MTM-9852	CHANGED	The Facilities screen has been reorganized and additional fields have been added to the Addresses and Contacts grids.
MTM-9862	CHANGED	Added the Assigned Contact, Optional, and Optional 1 fields to the Bulk Change process.
MTM-12661	FIXED	Resolved assorted security findings.
MTM-10000	FIXED	Resolved an issue regarding the use of special characters with MET/CAL Prompts.
MTM-10112	FIXED	Resolved an issue with the MET/TEAM Server installer that caused the Alerting Engine service to not start properly under certain circumstances.
MTM-10122	FIXED	Resolved an issue with the MET/TEAM Server installer that caused the database version check to fail under certain circumstances.
MTM-10142	FIXED	Resolved an issue that could potentially allow SQL injection on Find screens



Кеу	Issue Type	Description
MTM-10213	FIXED	Resolved an issue where the Asset and Facility List Relationships toolbar wouldn't render correctly
MTM-10223	FIXED	Resolved a few issues related to Date fields on MET/CAL Prompts, including passing selected values back to MET/CAL to write to variable.dat file.
MTM-10264	FIXED	Resolved an issue where days on the calendar were being marked complete when not all tasks for that day were completed.
MTM-10294	FIXED	Resolved a display issue on the Add Calendar Task screen.
MTM-10304	FIXED	Resolved an issue with rendering on the Calendar screen.
MTM-10324	FIXED	Resolved an issue with Mobile Check Out that would generate an error during rollback if the Check Out process timed out while transferring the database to the Mobile Workstation.
MTM-10334	FIXED	Resolved an issue that would cause the Mobile Check Out process to time out if the account MET/TEAM uses to access SQL Server did not have appropriate permissions.
MTM-10344	FIXED	Resolve an issue when Revision tracking didn't include a hyphen in the suffix.
MTM-10384	FIXED	Resolved an issue with adding the Authorization Code field to the Find Job Number screen.
MTM-10424	FIXED	Resolved some issues with MET/CAL Prompts regarding the source of initial field values.



Кеу	Issue Type	Description
MTM-10564	FIXED	Resolved an issue regarding read-only lookup fields not rendering properly on MET/CAL Prompts. Also remove support for the CallSheets.nGroupUID field and removed this field from any prompts that referenced it.
MTM-10594	FIXED	Resolved an issue with lookup fields not displaying the validation error message when using DataCheck.AddValidation() statements in a Data Check.
MTM-10604	FIXED	Several DataCheck Function names were fixed to validate correctly.  GetExName() Function was also fixed to work properly when the  DataCheck is executed.
MTM-10665	FIXED	Resolved an issue where the CallSheets.nJobNumberUID show the selected job number on the MET/CAL prompt.
MTM-10785	FIXED	Resolved Find Screen Add Criteria dialog rendering problems.
MTM-10805	FIXED	Resolved Type Procedure Default render problems.
MTM-10825	FIXED	Resolve an issue where MET/CAL prompt memo fields didn't accept messages from the quick notes.
MTM-10835	FIXED	Resolved an issue while using a Manual Template, where a customized description would get overwritten after modifying the nominal value.
MTM-10845	FIXED	Resolved Schedule Alert   Edit Schedule dialog render problems
MTM-10865	FIXED	Resolved Add Shipment Item dialog rendering problems
MTM-10875	FIXED	Resolved Category dialog rendering problems
MTM-10905	FIXED	Resolved an issue with the MET/TEAM Server installer that was not properly installing font files.



Кеу	Issue Type	Description
MTM-10955	FIXED	Fixed two Calendar issues: Not being able to see more than 25 tasks in a given month, and when sorting the data, more data would be shown in the grid instead of just the given month.
MTM-11155	FIXED	Resolved rendering issues with the 'Configure Screen - MainMenu' dialog.
MTM-11165	FIXED	Resolved an issue for trace reports when the maximum level is exceeded.
MTM-11205	FIXED	Resolved New Import Definition screen render problems.
MTM-11215	FIXED	Resolved New Import Setup screen render problems.
MTM-11225	FIXED	Resolved problems rendering the New Import screen.
MTM-11257	FIXED	Resolved Labor screen render issues.
MTM-11267	FIXED	Resolved Log Notes screen render issues.
MTM-11277	FIXED	Resolved Recall screen render issues.
MTM-11287	FIXED	Resolved Job Number render issues.
MTM-11328	FIXED	Resolved Registration screen rendering issues.
MTM-11338	FIXED	Resolved Work Order parts screen rendering issues.
MTM-11348	FIXED	Resolved Accreditation screen rendering issues.
MTM-11360	FIXED	Resolved Work Order Sticker Notes screen rendering issues.
MTM-11370	FIXED	Resolved issues for Data Checks not populating model fields.



Кеу	Issue Type	Description
MTM-11400	FIXED	The Service Type (TPD) on the Work Wrder find screen is now a dropdown field.
MTM-11471	FIXED	Updated reports to use the correct English date and number format in non-US locales.
MTM-11710	FIXED	Resolved an issue where the Session ID Cookie for MET/TEAM was not secure.
MTM-11823	FIXED	Resolved an issue where adding a Work Order to an existing Invoice would not show the billing details.
MTM-11847	FIXED	Resolved an issue with the MET/TEAM Server and Customer Portal installers that caused the web.config file settings to not get updated properly under certain circumstances.
MTM-11996	FIXED	MET/TEAM now prevents login for a user that only belongs to the Customer Portal security group.
MTM-12135	FIXED	Resolved an issue where the PXE used from MET/CAL was always linking to the latest procedure version in MET/TEAM instead of the matching PXE version.
MTM-4920	FIXED	Resolved an issue that required report file names to end with lowercase ".rpt" in order for the Batch Printing feature to work properly.
MTM-5077	FIXED	Resolved an issue on the Recall screen that prevented selecting a Department when the Customer's All checkbox is selected and the DepartmentBypass System Default setting is active.
MTM-5735	FIXED	Resolved an issue regarding complete removal of the MET/TEAM Mobile web site from a Mobile Workstation after performing a Mobile Check In.



Кеу	Issue Type	Description
MTM-5957	FIXED	Resolved an issue where an error message during MET/TEAM mobile checkout did not match the actual behavior of the process.
MTM-6672	FIXED	Resolved unhandled javascript errors when opening Data Check and Data Check SQL screens.
MTM-6948	FIXED	Added the Optional 1 and Optional 2 fields to the Work Order Batch Process.
MTM-7058	FIXED	Batch printing certs now matches individual cert printing for closed Work Orders, pulling the current cert from the files tab, rather than generating a new one.
MTM-7118	FIXED	Resolved an issue with Find screens that prevented the first row from being deleted from the search criteria section.
MTM-7199	FIXED	Changed the Address screen address field to all be disabled or not visible when configured to do so.
MTM-7249	FIXED	Updated the audit history for scheduled alerts to include the changes for recipients, schedules and report parameters.
MTM-7259	FIXED	Updated the MET/TEAM Help description of the Combine Work Order feature to match actual behavior.
MTM-7289	FIXED	Resolved an issue that prevented some menu options from being disabled via menu security.
MTM-7376	FIXED	Erroneous search criteria on Find screens for deleted items have been removed.
MTM-8489	FIXED	Fixed a message during MET/TEAM Mobile Check-In that referred to Check-Out.



Кеу	Issue Type	Description
MTM-8656	FIXED	Fixed the graphs on the Recallbyweekandmonth.rpt
MTM-8686	FIXED	Addressed an issue where the Data Cleanup Tool may fail to process all deleted records due to one or more dependent records in other tables not having been deleted.
MTM-8706	FIXED	Resolved issues regarding blank date fields on the MET/CAL Prompts.  Set the Make Blank option to No and disable cell for numeric and logical fields while editing MET/CAL prompts.
MTM-8726	FIXED	Resolved an issue in Customer Portal to be sure all Facilities are displayed from any contact linked to a user record.
MTM-8776	FIXED	Resolved an issue with the extended data grid, where numeric values may not be formatted according to the current locale.
MTM-8878	FIXED	Resolved an issue with the Data Cleanup Tool where CallSheetResults records may fail to get deleted, due to a dependency on CallSheetResultEx.
MTM-8888	FIXED	Resolved an issue where attempting to delete a manual template may result in a message that it couldn't be deleted because records are referenced by another record.
MTM-8910	FIXED	Resolved an issue with MET/CAL running with MET/TEAM, where result data viewed on the MET/CAL Runtime tab may indicate Pass Marginal even though guard banding was utilized.
MTM-8923	FIXED	Resolved an issue where an erroneous message was displayed with changing Facilities in Customer Portal.
MTM-8994	FIXED	Resolved an issue with combo data, where adding an item containing an ampersand (&) may not appear correctly on the list of items for the combo field edited.



Кеу	Issue Type	Description
MTM-9052	FIXED	Resolved an issue where the MET/CAL Prompts menu item may appear in the wrong language on the menu.
MTM-9371	FIXED	Resolved an issue that caused Find screens to not retain their previous size.
MTM-9391	FIXED	Resolved an issue that potentially caused the MET/TEAM Mobile Check Out process to not copy some MET/CAL shared directories to the mobile workstation and potentially not update some settings in the metcal.ini file.
MTM-9411	FIXED	Resolved an issue with the Remember feature on Find screens, settings will be remembered upon adding criteria, Reset All and record selection via OK, double-click or the Barcode feature.
MTM-9415	FIXED	Resolved issues with multiple fileds that are displayed as drop-down lists on Find screens
MTM-9441	FIXED	Resolved an issue appending a custom Revision Suffix after saving a locked Work Order.
MTM-9610	FIXED	Resolved an issue that, after activating the "Billing - Create Details" system default setting, would generate new line item details on an invoice that was originally created when this system default setting was inactive.
MTM-9679	FIXED	Resolved an issue using the Type Active field in the search criteria grid on the Find Assets to Receive screen.
MTM-9689	FIXED	Resolved an issue using the Recall Rule field in the search criteria grid on the Find Facility screen.



Кеу	Issue Type	Description
MTM-9699	FIXED	Resolved an issue that caused Find screen serarch criteria fields to not reflect the proper control type for fields that have been customized from a drop-down list to a textbox and vice versa.
MTM-9792	FIXED	Resolved issues in reports where the Work Order result wasn't being translated.
MTM-9802	FIXED	Addressed a label issue on the Notes tab of the Work Order when running in German.
MTM-9872	FIXED	Resolved issues related to customizing the Data Check Name field on the Edit Data Check screen and related Find screens and the Function Name field on the Edit Data Check SQL screen and related screens.
MTM-9922	FIXED	Resolved some rendering issues with the List Relationships screens for Assets and Facilities.
MTM-9980	FIXED	Resolved an issue related to incorrect due dates being generated with the recall rule set to end of month.