

MET/TEAM 2.2 AND MET/CAL 9.1 UPDATE

The MET/TEAM version 2.2 and MET/CAL version 9.1 release is a major update to the previous MET/TEAM and MET/CAL system. This update includes over 130 bug fixes for an improved MET/TEAM experience with greater efficiency, helping you accomplish more.

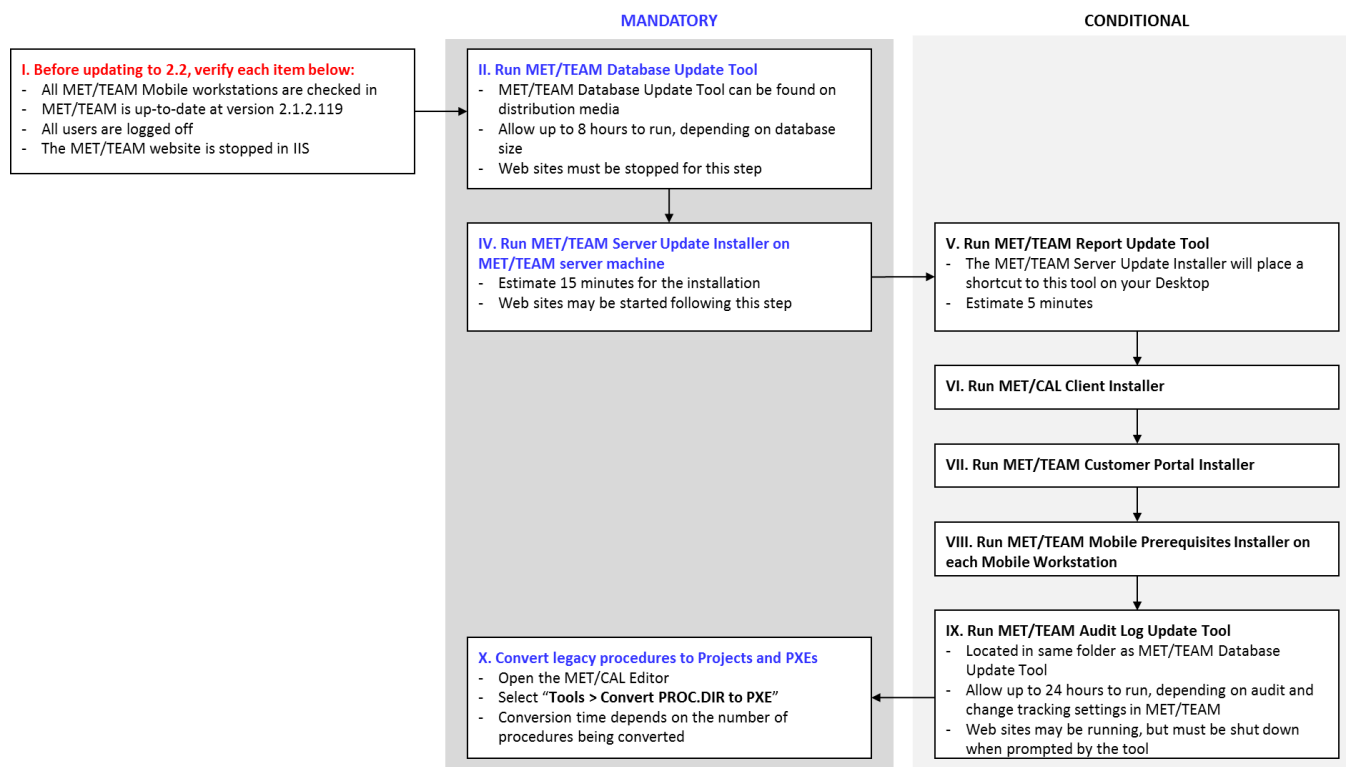
Some of the benefits that you will find in MET/TEAM version 2.2 and MET/CAL version 9.1 include: auto-generating PDFs of Calibration Certificates after completing Work Orders, Mobile and MET/CAL performance improvements, exporting Custom Reports as Excel files, and importing Manual Templates.

This document outlines very important topics that you must be aware of before starting the update process. Do not start the update process before reading this entire document, as well as any documents referenced within.

The update process requires multiple steps. This document will guide you through the planning and update process with a [roadmap](#), information to know [before updating](#), a [questionnaire](#), and finally [details on each step](#).

UPDATE ROADMAP

Follow the steps in this flowchart for a successful update from MET/TEAM version 2.1 to version 2.2. We have included time estimates collected during our testing process to assist you with planning for this update. Some steps will require stopping the MET/TEAM and Customer Portal websites and they will be inaccessible.



As indicated in the flowchart, many tools are provided for facilitating the update process. The location and proper usage of each of these tools are outlined in this document.

<u>MET/TEAM Database Update Tool</u>	Converts the MET/TEAM version 2.1 database to version 2.2
<u>MET/TEAM Server Update Installer</u>	Updates the MET/TEAM and Customer Portal web sites to version 2.2
<u>MET/TEAM Report Update Tool</u>	Updates any customized MET/TEAM reports to be compatible with version 2.2
<u>MET/CAL Client Installer</u>	Updates MET/CAL to version 9.1
<u>MET/TEAM Customer Portal Installer</u>	Updates Customer Portal on a stand-alone server to version 2.2
<u>MET/TEAM Mobile Prerequisites Installer</u>	Updates Mobile workstations to version 2.2
<u>MET/TEAM Audit Log Update Tool</u>	Converts all MET/TEAM version 2.1 database Audit Log records to version 2.2
<u>MET/CAL Convert PROC.DIR to PXE Tool</u>	Converts MET/CAL procedures from proc.dir to PXE (Procedure eXecutable) format and uploads them to existing procedure records in MET/TEAM

BEFORE UPDATING

Many of the major changes included in this release of MET/TEAM and MET/CAL are not visible to the user, but are structural in nature. In addition to these structural improvements, several beneficial features were added. Some of these changes may require some users to change how they use certain features of the software.

- **Database Records** – The paradigm MET/TEAM uses to uniquely identify each database record has changed. For this reason, all database records must be copied into a new database that has a schema to support the new paradigm.
- **Customized and Proprietary Reports** – Because of the database schema change, all reports must be updated. MET/TEAM's default reports will update automatically. However, if you have customized any of the default reports, or if you have created your own reports, they will need to be updated with the [MET/TEAM Report Update Tool](#).
- **MET/CAL Procedures** – This release of MET/CAL no longer supports running procedures from a compiled procedure directory (proc.dir). The only supported procedures are procedure executable (PXE) files. The MET/CAL Editor no longer supports publishing (saving) procedures to a proc.dir. Any procedures located in a proc.dir must be converted to PXE format. This is easily accomplished by using the [MET/CAL Convert PROC.DIR Conversion Tool](#), but can take significant time depending on proc.dir size.
- **Audit Log Update** – For MET/TEAM systems where Change Tracking and Audit logging are used, these logs must be updated as well. This is accomplished by using the [MET/TEAM Audit Log Update Tool](#).

QUESTIONNAIRE

Complete this questionnaire before starting the update process to assist with planning and informational purposes. Answers to these questions will determine the utilities required for a successful update. Additional details about utility usage is located in each utility's **ReadMe file**. The **Notes** column in the questionnaire provides additional information and direction regarding each of the questions. Become familiar with each of the required utilities prior to starting the update process by reviewing their **ReadMe files** or other accompanying documentation. Some utilities require the MET/TEAM and Customer Portal web sites to be shut down in IIS, while others can be run while MET/TEAM and Customer Portal are running.

Question	Answer	Notes
Is the MET/TEAM system being updated a Production (live) system?		Schedule the update for a time that will least impact users. The MET/TEAM web site will have to be shut down, potentially for a number of hours, during the update process.
Are MET/TEAM and MET/CAL up-to-date?		Your system should be running the latest MET/TEAM and MET/CAL versions before starting the update process. See Current Release of MET/TEAM and MET/CAL below.
Are you using MET/TEAM Mobile?		Make sure all Mobile workstations are checked in before starting the update process. Once the server is updated to version 2.2, you will not be able to check in any version 2.1 Mobile workstations. SQL Server version must match between Mobile workstations and MET/TEAM server.
Is SQL Server installed on the same machine as the MET/TEAM web site?		See SQL Server Express and MET/TEAM Licenses below.
If no, do you have access to the SQL Server machine to deploy and run a utility on it?		The MET/TEAM Database Update Tool and MET/TEAM Audit Log Update Tool are more efficient when run on the machine where SQL Server is installed, but this is not required. Sysadmin access to the server is required.
If no, do you have access to manually restore an empty database using SQL Server Management Studio?		If the MET/TEAM Database Update Tool cannot run on the SQL Server machine, you will need to manually restore an empty database for the tool to use. This may require the assistance of someone from your IT department.
Do you have a login with <i>sysadmin</i> rights in SQL Server?		The MET/TEAM Database Update Tool needs to perform many functions that require <i>sysadmin</i> rights in order to setup the new database.
What is the size of your MET/TEAM database?		MET/TEAM must be shut down to update the database. The duration of this down time depends largely on the size of your database. For databases under 1 GB, it may take less than an hour. For databases that exceed 20-30 GB, this may require many hours. Plan accordingly. Be sure to back up your MET/TEAM database before starting update process
Is MET/TEAM using SQL Server Express edition?		SQL Server Express supports a maximum database size of 10 GB (9.1 GB in practice)

If yes, is your database larger than 8 GB?		You are approaching the 10 GB size limit for Express databases. In addition, Express has some limitations that inhibit performance in larger databases. You may want to consider taking advantage of the down time during this update process to switch to a different edition of SQL Server. This will require re-requesting your licenses. Make sure MET/TEAM is fully functional on the new edition of SQL Server, including all licenses, before starting the update process. See SQL Server Express and MET/TEAM Licenses below.
In MET/TEAM, do you have the System Defaults “Auditing” or “Change Tracking” active?		In some cases, copying the Audit Log records to the new database can take the majority of the database update time. This process has been separated from the rest of the database update process and should be done after the rest of the update is complete. See MET/TEAM Audit Log Update Tool below.
Have you customized any of the default reports that originally came with MET/TEAM?		Any customized reports must be updated using the MET/TEAM Report Update Tool to be compatible with version 2.2.
Have you created any new reports for use with MET/TEAM?		Any proprietary reports must also be updated using the MET/TEAM Report Update Tool .
Are you using Customer Portal on a stand-alone server?		The Customer Portal stand-alone installer must run on the machine hosting the stand-alone Customer Portal web site to update it. See MET/TEAM Customer Portal Installer below.
Have you customized any of the default reports that originally came with Customer Portal?		Any customized reports for Customer Portal must be updated using the MET/TEAM Report Update Tool .
Have you created any new reports for use with Customer Portal?		Any proprietary reports for Customer Portal must also be updated using the MET/TEAM Report Update Tool .
Do any of your customized or proprietary reports use barcode fonts that depend on 32-bit libraries?		The MET/TEAM Report Update Tool will notify you of any reports that appear to include a barcode. If the barcode font does not include 64-bit libraries, you must manually update those reports using Crystal Reports Designer before they can be used with version 2.2.
Are you using MET/CAL?		The MET/CAL Client Installer will need to be run on all MET/CAL workstations once the MET/TEAM Server is updated.
Do you run any MET/CAL procedures from proc.dir?		MET/CAL version 9.1 no longer supports running procedures from proc.dir. All proc.dir procedures must be converted to PXEs using a new automated feature in MET/CAL Editor . This conversion process may take hours depending on the number of procedures to be converted. See MET/CAL Convert PROC.DIR To PXE Tool .
Do you run MET/CAL proc.dir procedures directly from Work Orders in MET/TEAM?		The new procedure conversion feature in MET/CAL Editor will also upload new PXE files to Procedures in the MET/TEAM database, replacing references to proc.dir procedures. See MET/CAL Convert PROC.DIR To PXE Tool below.

UPDATE DETAIL

Once you have completed the questionnaire, refer to the following sections for more details on the path you should take to complete the update process.

I. CURRENT RELEASE OF MET/TEAM AND MET/CAL

Make sure your MET/TEAM and MET/CAL systems are up to date with the latest release before starting the update process. The version information can be found on the **Help > About** screen in each application. The current versions are:

MET/TEAM – version 2.1.2.119

MET/CAL – version 9.0.0.787

If you are not currently using these versions, contact [Fluke Calibration Software Support](#) to obtain an update prior to starting the update process to this release.

II. MET/TEAM DATABASE UPDATE TOOL

The **MET/TEAM Database Update Tool** copies all MET/TEAM records to a new database for use with this release. This requires the MET/TEAM and Customer Portal web sites to be shut down so that no new records are being added to the database and existing records are not being altered during this process. This process may take many hours, depending on the size of your database. Plan to run this tool at a time when it will be least impactful for your organization.

It is recommended that you run the **MET/TEAM Database Update Tool** on the machine where SQL Server is installed, if possible. If this is not possible, you will be required to manually restore an empty database using **SQL Server Management Studio** prior to running the tool. Refer to the ReadMe file that accompanies the **MET/TEAM Database Update Tool** found in the \DBUpdate folder on the MET/TEAM distribution media.

III. SQL SERVER EXPRESS AND MET/TEAM LICENSES

The [MET/TEAM Database Update Tool](#) is designed to transfer all of your MET/TEAM licenses to the new database. If you are currently using SQL Server Express, and choose to switch to another edition of SQL Server due to the size of your database, you must move the database, then re-request and apply your licenses prior to running the [MET/TEAM Database Update Tool](#). Make sure your MET/TEAM web site is fully functional before running the [MET/TEAM Database Update Tool](#).

If you are using MET/TEAM Mobile and you are moving your database to a different edition of SQL Server, be sure to use the same version (i.e. SQL Server 2008 R2) of SQL Server. Otherwise, all Mobile workstations will also need to be updated to use the same version of SQL Server.

IV. MET/TEAM SERVER UPDATE INSTALLER

Once the [MET/TEAM Database Update Tool](#) has successfully copied the database records, run the **MET/TEAM Server Update Installer** from the MET/TEAM distribution media to update the MET/TEAM and Customer Portal web sites. Once this installer has finished, the MET/TEAM web site should be accessible again and can be used.

Refer to the **MET/TEAM Installation Guide** for more details on using the installers.

V. MET/TEAM REPORT UPDATE TOOL

This step is **CONDITIONAL**, as your deployment of MET/TEAM may not have custom reports that require updating.

The [MET/TEAM Server Update Installer](#) creates a backup of all MET/TEAM and Customer Portal reports before deploying the default reports designed to work with the new version 2.2 database schema. If you customized any of the default MET/TEAM or Customer Portal reports, or if you have created any custom reports, run the **MET/TEAM Report Update Tool** to update your customized reports for use with version 2.2.

The [MET/TEAM Server Update Installer](#) creates a shortcut on the desktop for this tool. You can locate the backup of the report files using the log file that the [MET/TEAM Server Update Installer](#) generates and displays at the end of the installation.

If the Report Update Tool did not find any reports to update, the screen will remain blank. If there are reports to update not found by the tool, please see the documentation included with the tool to manually convert those reports.

VI. MET/CAL CLIENT INSTALLER

If you are using MET/CAL, on each MET/CAL workstation, connect to the **\metteam** share and run the **MET/CAL Client Installer** from the **\Installers\METCAL** folder to update MET/CAL to the latest release.

VII. MET/TEAM CUSTOMER PORTAL INSTALLER

If you are using Customer Portal and the Customer Portal web site has been installed on a different server, run the **Customer Portal stand-alone installer** on the Customer Portal server from the shared **\metteam** folder to update it. The installer will deploy the Report Update Tool on the Customer Portal server, which must be run to update any customized or proprietary Customer Portal reports for use with version 2.2.

Refer to the **MET/TEAM Installation Guide** for more details on using the installers.

VIII. MET/TEAM MOBILE PREREQUISITES INSTALLER

If you are using MET/TEAM Mobile, on each Mobile workstation, connect to the **\metteam** share and run the **MET/TEAM Mobile Prerequisites installer** from the **\Installers\Mobile** folder to update the workstation for the latest release of MET/TEAM Mobile. Refer to the **MET/TEAM Installation Guide** for more details on using the installers.

IX. MET/TEAM AUDIT LOG UPDATE TOOL

This step is **CONDITIONAL**, as your deployment of MET/TEAM may not be configured to save Audit and Change Tracking data.

A separate utility is used to copy Audit Log records from the previous MET/TEAM database. For systems where Auditing and/or Change Tracking features are enabled, this process may take a significant amount of time. The majority of this process can happen while MET/TEAM version 2.2 is running, however MET/TEAM will need to be shut down for a short time to complete the process. This tool will prompt you when MET/TEAM needs to be shut down.

Run the **MET/TEAM Audit Log Update Tool** after the [MET/TEAM Server Update Installer](#) has finished. It is recommended that you run the **MET/TEAM Audit Log Update Tool** on the machine where SQL Server is installed, if possible. The **MET/TEAM Audit Log Update Tool** is included in the same folder as the [MET/TEAM Database Update Tool](#).

X. MET/CAL EDITOR CONVERT PROC.DIR TO PXE TOOL

This release of MET/CAL no longer supports running procedures from, or publishing procedures to, a compiled procedure directory (proc.dir). If you are still required to run procedures from a proc.dir, you must update your procedures to a **Procedure eXecutable (PXE)** format after MET/CAL version 9.1 is installed.

The version 9.1 **MET/CAL Editor** includes a new, fully automated tool to convert one or more procedure directories to PXEs. This process will also upload the resulting PXEs to existing Procedures in the MET/TEAM database. Procedures in the database that were configured to use proc.dir procedures will be archived and then revised to use the converted PXE.

Refer to the **MET/CAL Editor** help system for details on using the proc.dir to PXE conversion feature.