

Version 25



Trapeze

Enterprise Asset Management

Test Results

Reference Guide

Trade Secret | February 2025

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Technical Support

Trapeze provides several ways to connect with the Customer Care team. Please provide detailed information to the representative. If you are reporting an issue by e-mail, include any error messages, screen shots of your problem, and steps to replicate the issue.

Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Test Results – Reference Guide

Version 25.x

February 2025

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1. Overview

Use the test results features to track quantitative and qualitative value for assets. You can also track a simple pass or fail as well. Some examples of items test results can track include tire pressure, oil levels, tire tread depth, di-electric tests, smog test values, etc.

- ❗ Do not use the browser's **Back** button in the Web Modules as unanticipated results may occur.
- ❗ Do not open or use the same instance of the Web Modules in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

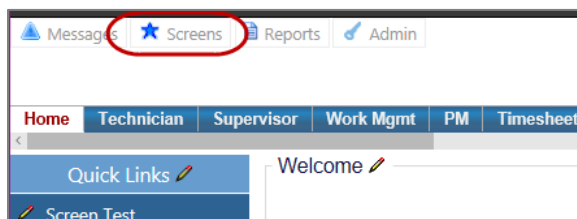
The following document describes how to set up and use test results.

Accessing Screens

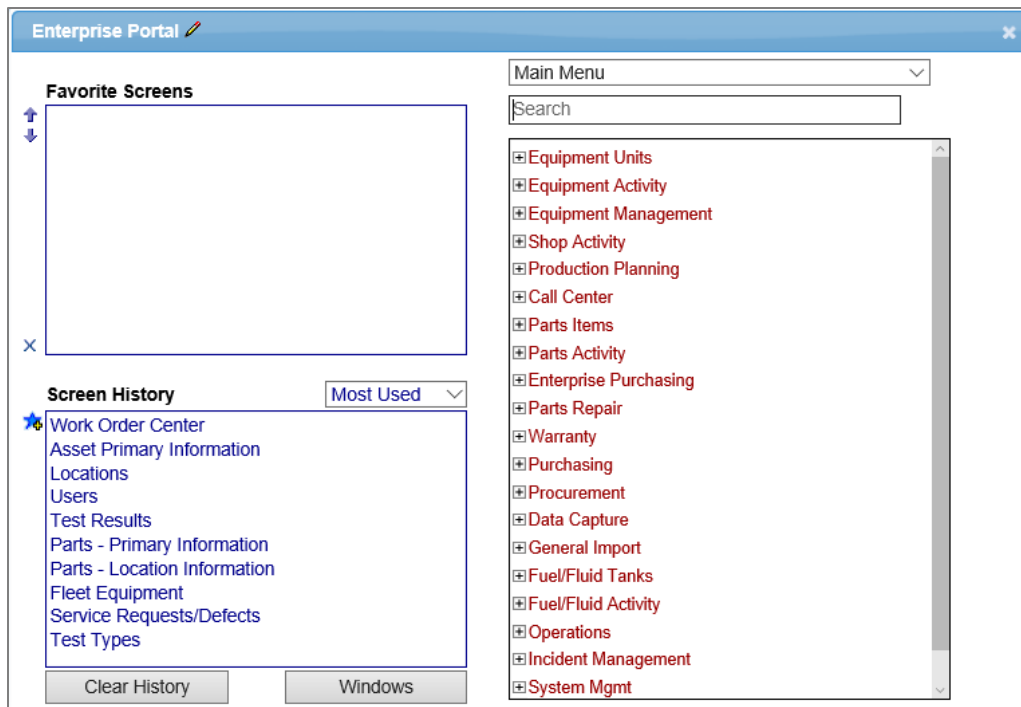
The Enterprise Portal screens allow users to set up key components for test results.

To access the Enterprise Portal screens:

1. From the web modules instance, click the **Screens** button.



2. This opens the Enterprise Portal menu.



3. Do one of the following to find the screen:

- Use the **Search** field to search for the correct screen
- Click through the list of red links to find the screen you need to open.

2. Setting-up Testing

To use test results, they must be set up with testing information first. Follow the below processes to get test results ready to go.

Test Elements Screen

The Test Elements screen allows you to define elements to include in specific types of tests, and to associate symptoms with test elements. For example, if you have a test type for tire testing, that test type could include an element for tire pressure and an element for tire tread. Test elements include things such as taking measurements and item checks (measuring oil level or checking for carbon monoxide). Test elements can be set as qualitative, quantitative, or a simple pass or fail.

The screenshot shows the 'Test Elements' screen. At the top, there is a header bar with 'Test Elements' on the left and 'ADMIN MODE', 'CHANGE REQUEST', and 'HELP' on the right. Below the header is a toolbar with buttons for 'Search', 'Reload', 'Sort', 'Select Filter', 'Select Sort', 'New', 'Copy', 'Delete', 'Edit', 'Save', and 'Cancel'. The main area is divided into two sections: 'Elements' and 'Symptoms'. The 'Elements' section is currently active and shows a form with a 'Test element ID' field, a 'Description' field, and a 'Procedures' field. The 'Symptoms' section is currently inactive.

To create test elements:

1. From the Enterprise Portal menu, open the Test Elements screen.
2. At the top of the screen, click **New**.
3. Enter all required values to create a test element on the Test Elements screen.
4. If needed, click the **Help** button at the top of the screen for more information about the fields and creating a test element.
5. When you are done entering the information, click **Save**.

Test Types Screen

The Equipment Activity Test Types screen allows you to define a test type and assign the elements that are part of the test. Test types could include a set of items to test for. For example, a test type for tires could include elements relating to test for tires such as air pressure, tread, etc. Use this screen to also set where to use the test type.

To create test types:

1. From the Enterprise Portal menu, open the Equipment Activity Test Types screen.
2. At the top of the screen, click **New**.
3. Enter all required values to create a test element on the Test Type screen.
4. If needed, click the **Help** button at the top of the screen for more information about the fields and creating a test type.

 Note: For instructions on how to add a file, refer to the [Adding an Associated File](#) section below.

5. When you are done filling out the information, click **Save**.

✓ If the Test Type for a test result has the following configuration, the system will automatically pass/fail the test element. If the Test Element fails to meet this range and it supports a single Symptom, the SymptomID will be defaulted.

- Allow Result = false

- Allowable Min/Max - one of them has to be non-0. This means that there is a range for the numeric value the user enters to be tested against.

Adding an Associated File

Use associated files to add more information to an item.



Note: The following procedure will differ slightly visually when adding a link through Enterprise Purchasing vs through a web module. The process itself is generally the same.

To add a link:



In the Enterprise Portal screens, click the paperclip button in the Associated file section, or in the Web Modules, click **Add Link**.

The 'Associated file' form contains two input fields: 'Path and file name' and 'Description'. A red circle highlights a paperclip icon located to the right of the 'Path and file name' field.

The 'Related File Links' dialog features a 'Manage links for' dropdown menu set to 'Test Result 351334'. A red oval highlights the 'Add Link' button. Below this, there is a list of existing links, each with a delete icon (X), an edit icon (pencil), a title, a description, and a search icon (magnifying glass). The existing links are:

delete	edit	title	description	search
X		DESCRIPTION OF THE PIC		
X		TEST IMAGE	TEST IMAGE DESCRIPTION	

The Add Link dialog displays. Choose to upload a file, scan in a file, add a URL link, add a report link, or cancel.

The 'Add Link' dialog presents five options, each with a red icon and text:

- Upload File
- Scan in File
- Add URL Link
- Add Report Link
- Cancel



Note: The Scan in File option may not display in the Add Link dialogue in the Enterprise Portal screen.

The subsequent dialog that displays will be one of the following (for more information, see the appropriate section directly below this list):

- **Upload File:** Enables you to upload a file with an optional title and description.
- **Scan in File:** Enables you to scan a file with a title and description.
- **Add URL Link:** Enables you to link to a network resource (e.g., a web site or a shared network file on your company's intranet).
- **Add Report Link:** Enables you to point to a Web Modules report (currently only Crystal Reports are supported).



Note: For report links, farpt:/// is automatically added to the file name when you save.

- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.

Upload File

Enter the file, title (optional), and description (optional), and click **Upload** to upload the file.



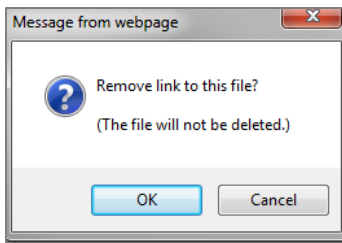
Note: As a precaution, do not upload .exe and .dll files, or extremely large files.

*The file displays in the **Related File Links** section.*

Once a file has been added, you may delete, update, or view the file as shown below:

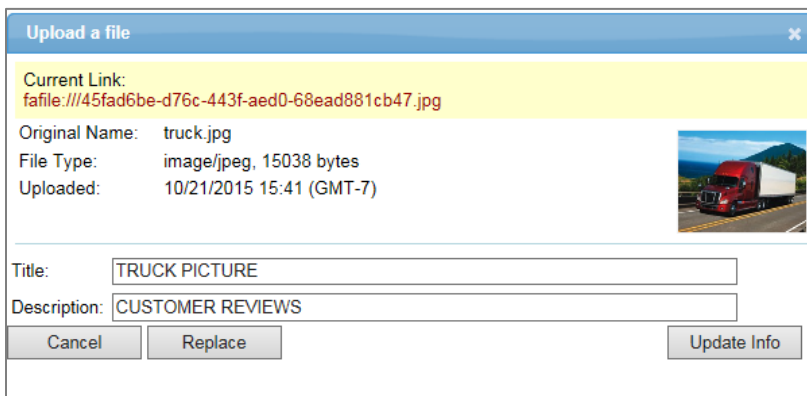
1. Click the  icon to delete the link to the file.

A dialog will confirm that you want to remove the link to the file.



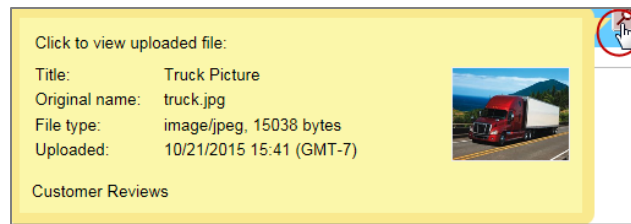
2. Click **OK** to remove the link.
3. Click the edit icon  to update the file.

The Upload a file Edit dialog displays with the following buttons:



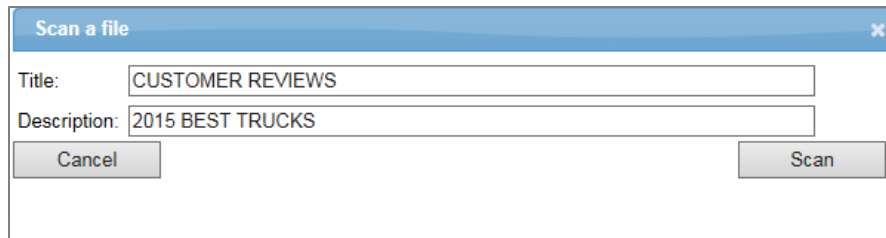
- i. **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top, right corner.
- ii. **Replace:** Allows you to replace the uploaded file with a different uploaded file, but keep the same basic information.
 - a. Click the **Replace** button and a validation message displays.
 - b. Click **Yes**.
 - c. In the new **Upload a file** dialog, enter the new information and click **Upload**.

The original file is not deleted from the server, but unless you preserve the original fafile:/// URL, you will not be able to access the old file any more.
- iii. **Update Info:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.
 - a. Hover over the zoom  icon to view the file information and click the zoom  icon to go to the file.



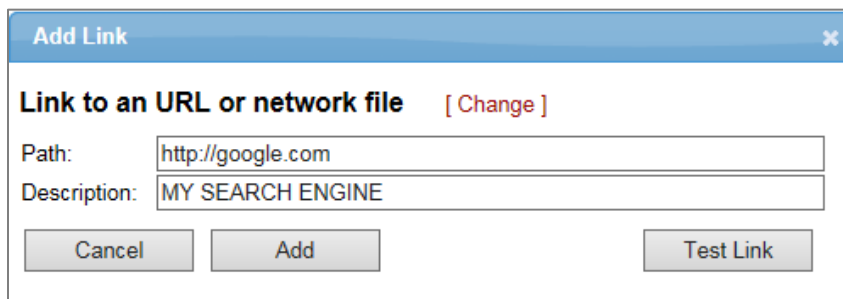
Scan in File

Upon clicking **Scan**, the ActiveX control uses a scanner to scan and upload an image. If the ActiveX control is not loaded, the **Scan** button is disabled.



Add URL Link

1. Enter Path and Description and click **Test Link** to test the link.
2. Then click **Add** to add the link.



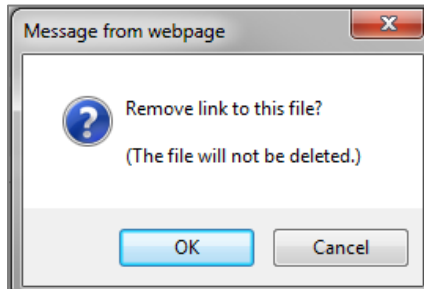
The URL link displays in the Related File Links section:



Once a URL link has been added, you may delete, update, or view the link:

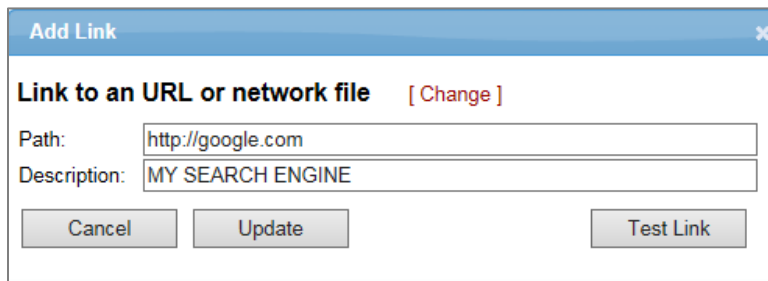
1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.

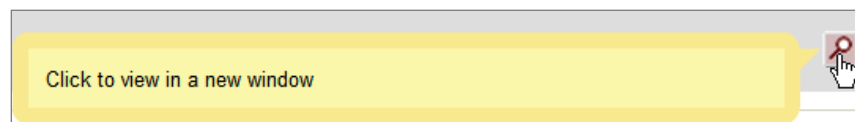


2. Click **OK** to remove the link.
3. Click the pencil  icon to update the link.

The Add Link Edit dialog displays where you may change, update, and test the link.



- **Change:** Allows you to select a different type of link.
- **Update:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.
- **Test Link:** Allows you to test the link.
- **Cancel:** Closes the dialog. You can also press **Esc** or click the **X** in the top right corner.
- Hover over the zoom  icon to see the message, or click the zoom icon in order to view the URL link in a new window.



Add Report Link

The Add Report link enables you to point to a web modules report (currently only Crystal Reports are supported).

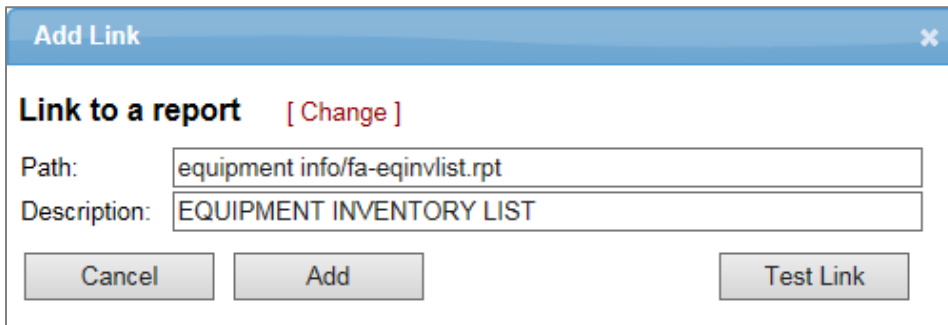
 Note: For report links, farpt:/// is automatically added to the file name when you save.

To add a link to a report:

1. From your web browser, copy the part of the report's URL that identifies the report. This link contains the folder name (seen below as Shop Activity) and the name of the report (Work Order Detail.rpt).

For example:

- `http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt`
becomes
 - `Shop Activity/Work Order Detail.rpt`
2. Paste the report identifier string (path) and description.
 3. Click **Test Link** to test the link.
 4. Click **Add** to add the report link.



The 'Add Link' dialog box has a title bar with a close button. It contains a section titled 'Link to a report' with a '[Change]' link. Below this are two text input fields: 'Path:' containing 'equipment info/fa-eqinvlist.rpt' and 'Description:' containing 'EQUIPMENT INVENTORY LIST'. At the bottom are three buttons: 'Cancel', 'Add', and 'Test Link'.

The report link displays in the **Related File Links** section:

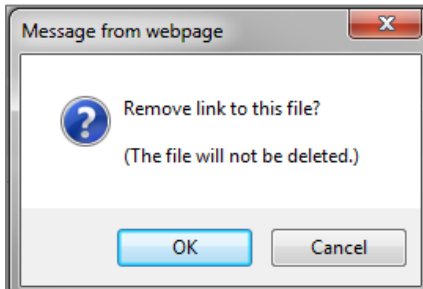


The 'Related File Links' section displays a list of three links. Each link row includes a red 'X' icon, a pencil icon, the link text, and a magnifying glass icon. The links are: 'Truck Picture CUSTOMER REVIEWS', 'http://google.com MY SEARCH ENGINE', and 'farpt:///equipment info/fa-eqinvlist.rpt EQUIPMENT INVENTORY LIST'.

Once a report link has been added, you may delete, update or view the link:

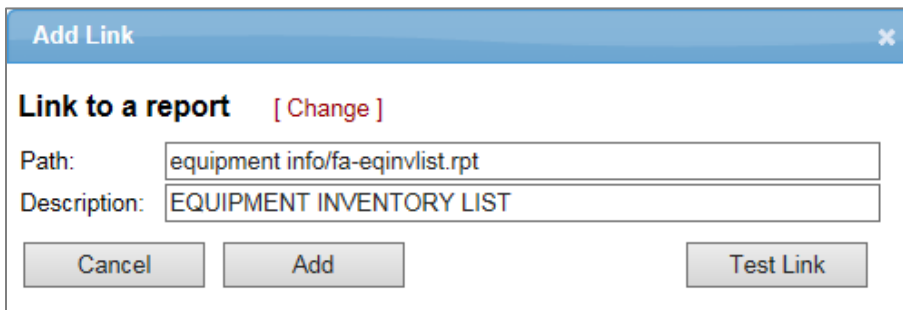
1. Click the  icon to delete the link.

A dialog will confirm that you want to remove the link.



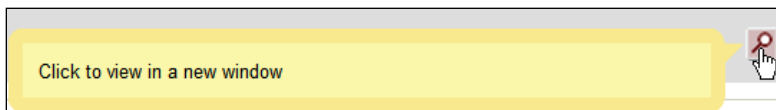
2. Click **OK** to remove the link.
3. Click the pencil  icon to update the link.

*The **Add Link** dialog displays where you may change, edit, update, and test the link.*



- Change – Allows you to select a different type of link.
- Add - Enter the correct information and click the Add button.
- Test Link – Allows you to test the link.
- Cancel - Closes the dialog. You can also press Esc or click the X in the top right corner.

4. Hover over the zoom  icon to see the message to click the zoom  icon in order to view the report in a new window.



Test Groups Screen

Use the Test Groups screen to create test groups. Test groups allow you to create a group of different test types that may be performed together. For example, a test group named Lights may contain tests for items like checking headlights, taillights, interior lights, and so on.

Test Groups ADMIN MODE CHANGE REQUEST

Search Reload Sort Select Filter Select Sort New Copy Delete Edit Save

Test group ID

Basic Info

Description

Test types associated to test group

Row #	Delete	Sequence	Test type ID	Description
-------	--------	----------	--------------	-------------

To create test groups:

1. From the Enterprise Portal menu, open the Test Groups screen.
2. At the top of the screen, click **New**.
3. Enter all required values to create a test element on the Test Groups screen.
4. If needed, click the **Help** button at the top of the screen for more information about the fields and creating a test element.
5. When you are done filling out the information, click **Save**.

Portal Test Results Settings

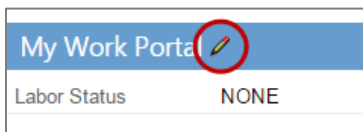
In the Setting page of each of the Shop Activity module portals, there are settings dealing with test results displaying in Web Modules. The following sections give information to set up these settings correctly to help display test results information as needed.



Note: Only users with administrative rights have access to the edit pencil.

To open this settings page:

1. Open the Shop Activity portal you have access to.
2. Click the edit pencil to the right of the portal name.



The Settings page displays.

Highlight Test Results button if result status is

This section is near the bottom of the portal settings page. Scroll down to find the **Highlight Test Results button if result status is** section. In this section, you can check the boxes to choose the statuses that determine when the **Test Results** button is highlighted.

Highlight Test Results button if result status is:

☒	PENDING
☒	IN PROGRESS
☐	PASS
☐	PASS CORRECTED
☐	FAIL
☐	PERFOMED
☐	NOT PERFORMED

PM Checklists

Test results can be set up to automatically be added to PM checklist items for use within Web Modules. Setting this enables a button on the PM checklist that lets you edit a test result or test group for that checklist.

To set up testing for PM checklists:

1. From the Enterprise Portal menu, open the Class/Task Information screen.

2. Search for the equipment class or PM service task (or both).
3. Click **Edit**.
4. Enter the required information on the Class/Task screen's PM Tasks tab:

Use this tab to define a checklist of PM tasks to be included in a specific task or standard ID. PM tasks may include items such as oil and filter changes or checking components.

- i. Enter the **Test type ID** or **Test group ID** for the PM task record that needs to perform the test. Test groups are intended for more than one test to be associated with a single task.

5. Enter the required information on the Class/Task screen's Procedures tab:

The Procedures tab enables you to enter task procedure text by class and specify test types on work orders.

Procedures

Test type ID

Test types on work orders

Row #	Delete	Test type ID	Required?	Class purpose	Test type description

Task procedure information for this class

- i. Add the **Test type ID** or **Test group ID** that needs to be on the PM checklist. This is required for the system to automatically generate test results when a PM checklist is added to a work order.
 - ii. Check the **Required** checkbox and set the **Class purpose** drop-down to **PM PROGRAM** to require this item on the PM checklist for this equipment class.
6. Complete the PM Tasks tab and Procedure information for each equipment class or PM service task.
7. Click **Save**.



Note: For test to work correctly, the location where the test is taking place must have the **Test** checkbox enabled. This is located on the Locations Primary Information screen, Functions tab.

Locations

ADMIN MODECHANGE REQUEST

Search

Reload

Sort

Select Filter

Select Sort

New

Copy

Delete

Edit

Save

Location ID

Basic Info

Functions

Work Orders - Options

Work Orders - Service Requests

Work Orders - More Info

Work Orders - Defaults

Inventory

Functions

☐ Shop (regular)

☐ Shop (mobile)

☐ Shop (external)

☐ Equipment site

☐ Fueling site

☐ Parts inventory

☐ Pool (dispatch)

☐ Station

☐ Test

☐ Shop scheduling active

☐ Operations

☐ Allocation and assignment (quartermaster)

Work management classification

3. Using the Work Order Test Results Pop-in

Following is an overview of how to use the Test Results pop-in to begin new tests, edit existing tests, and add files, URLs, and report links to tests and test elements.

To start a new test or view test results:

1. Click the **Test Results** button on the Work Order Main and Work Order Details pages or click the **Test Details** button on the Work Order Details page to go to the Test Results pop-in. Also, on the Technician portal, if you are jobbed-on to a task, the **Test Results** button displays on the right side of the Current Job tab.

Work Order Main					
Asset ID	CNCAR018: SNCAR018 2012 FORD F150 CAR 018			Tech ID	Tech Name
Life Meter 1	300 MILES	Station Location	CNLOC1 - REPAIR SHOP 1	No employees currently working	
Repair Location	CNLOC1 - REPAIR SHOP 1				
Work Order ID	CNLOC3-2013-1	Job Status	OPEN		
Job Type	REPAIR	Unit In	05/06/2013 16:33		
Due	05/07/2013 16:33	Meter 1	100 MILES		
Hours Completed	0.03 / 0.03 (100.00%)	Tasks Completed	0 / 1 (0.00%)		
Projected Completion Date	10/21/2015 13:01				
Tasks: 1			Actions		
	Task ID	WAC	Remaining Hours	Main Page	Start Delay
	GNMTASK1 - GNM REPAIR GROUP - GNM TASK1 DESC		-0.03	Finish Work Order	Part Actions
				Equipment History	Test Results
				Messages	View/Edit Detail
				Commercial Work	Notes
					Related Files
					Component Warranty
					Relationships

Work Order Main Page **Test Results** Button

Work Order Details					
Asset ID	CNCAR018: SNCAR018 2012 FORD F150 CAR 018				
Life Meter 1	300 MILES	Station Location	CNLOC1 - REPAIR SHOP 1		
Repair Location	CNLOC1 - REPAIR SHOP 1				
Work Order ID	CNLOC3-2013-1	Job Status	OPEN		
Job Type	REPAIR	Unit In	05/06/2013 16:33		
Due	05/07/2013 16:33	Meter 1	100 MILES		
Hours Completed	0.03 / 0.03 (100.00%)	Tasks Completed	0 / 1 (0.00%)		
Projected Completion Date	10/21/2015 13:01				
Repair Reason ID	J - OTHER	Work Class			
Account ID	CNACCT0001 - UNIT ACCOUNT 0001	Parking Stall			
Priority ID	3 - ROUTINE	Reference Order ID			
Contact Name		Phone			
Summary Cost Info					
Labor Hours	Labor Cost	Parts Cost	Commercial Cost	Equipment Cost	Total Cost
0.03	0.65	0.00	0.00	0.00	0.65
Messages Equipment History Print Work Order Start Delay Notes Edit Basic Info Relationships Files Test Results Equipment Usage Crew Time Entry Add / Manage SRs Work Order Tasks New Job					

Work Order Details **Test Results** Button

My Work Portal SARAH VICKERS (SRV) 1-0

Work Order: 1-2015-5 Task Time Code: REG - REGULAR [Change]

Task: 001 - ELECTRICAL SYSTEM [Modify]

Equipment: SRV-CAR1: 7897894569 2006 CHEVROLET BLAZER RED BLAZIN FIRE

00h 02m Indirect Time

Edit/Stop Task Today's Times

Clock Out

Current Job My Work Requests

Priority: Q0 - QA'S PRIORITY CODE Service Status: Due: 10/01/2015 09:48 AM

Asset No: SRV01 License No: JFK-509 Unit In: 09/29/2015 09:48 AM

SR Task: 001 - ELECTRICAL SYSTEM

Select Symptom: QA-SYMP-CRACK - QA SYMPTOM FOR CRACK Description: 3C TASK GENERATED

Start 001 - ELECTRICAL SYSTEM WAC:

Select Symptom: ANOTHER-OIL - ANOTHER OIL

Start CNTASK030 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 030 WAC:

Start CNTASK031 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 031 WAC:

Start CNTASK032 - CN REPAIR GROUP - SUPPORTS ALL ASSET CATEGORIES - TASK 032 WAC:

Select Symptom: A - A

Start A - PM SERVICE A WAC: 02

Actions Notes Comments

View/Edit Detail

Equipment History

Print Work Order

Commercial Work

Component Warranty

Start Delay

Part Actions

Test Results

Related Files

Messages

Finish Work Order

Test Results button in the Current Job tab in the Technician portal.

Test ID	Test Type ID	Test Type Description	Started	Result
350887	CN-TEST-TYPE-005	TEST 005	07/24/2014 15:36	PENDING

Work Order Details **Test Details** Button

The Test Results pop-in displays.

CNLOC3 2013-1 Test Results

Existing Test Results: 1

Test	Description	Group ID	Started	Status	Approved and Closed
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3 Start

Close

This pop-in lists existing tests for the work order (if any) and allows you to view or edit existing tests and start new tests.

- From this pop-in, perform one of the following:

- If existing tests are listed, click on a button in the **Test** column to open the Test Result Details Test Elements Summary page (as outlined in the [Review and Update Existing Test Results](#) section).
- Otherwise, to begin a new test, follow the instructions in the next section, [Start a New Test](#).

Start a New Test



Note: If no tests display in the **Start a New Test** drop-down menu, the record for this test type may need to be associated with the appropriate information. On the Test Types screen, make sure the Equipment Types, Equipment Classes, and Equipment IDs are correctly associated to the equipment types, classes, and IDs needing testing.

To begin a new test:

1. Select a test from the **Start a New Test** drop-down list and click the **Start** button as shown below.

CNLOC3-2013-1 Test Results

Existing Test Results: 1

Test	Description	Group ID	Started	Status	Approved and Closed
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3 ☒ **Start**

Close

The Test Result Details test elements entry pop-in displays.

 Note: The Test Elements Entry page will vary in appearance based on the Test and options you have chosen for the test types and test elements.

 Note: Depending on configuration, files may be allowed or required to pass the test. If set to allow or require files, the **Files**  icon will display on the Test Elements Entry page. Test elements are set to **Allow file** or **Require file** on the Test Types - Test Elements tab as shown in the screenshot below.

	Require condition score	Allow comment	Require comment	Allow file	Require file	Allow date and time	Require date and time
	☐	☒	☐	☒	☐	☐	☐
	☐	☒	☐	☒	☒	☐	☐

- In this example, the KV Rating Element requires a file while the KG TE Element allows a file to be uploaded if desired.

 Note: To add a file as required for the KV Rating Element, on the Test Result Details pop-in, click the **Files**  *** Required** icon.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: **IN PROGRESS**

Approved and Closed: ☐ [/ /]

Testing certificate number: []

Vendor ID: []

Meter 1: 300

Vendor invoice: []

Meter 1 Validation: []

Test Elements Entry

KV RATING

Comments: []

Result: []

Not Performed: ☐

Files: [] Required

KG TE

Comments: []

Result: []

Not Performed: ☐

Files: []

The Related File Links dialog displays.

Related File Links

Manage links for: **KV RATING**

Add Link

- The **Manage links for** drop-down selection is already grayed-out with the particular test element selected. Click **Add Link**.

Related File Links

Manage links for: **KV RATING**

Add Link

Test element to add the link is already selected (grayed-out)

- To upload a file, select **Upload File**.

Add Link

Upload File

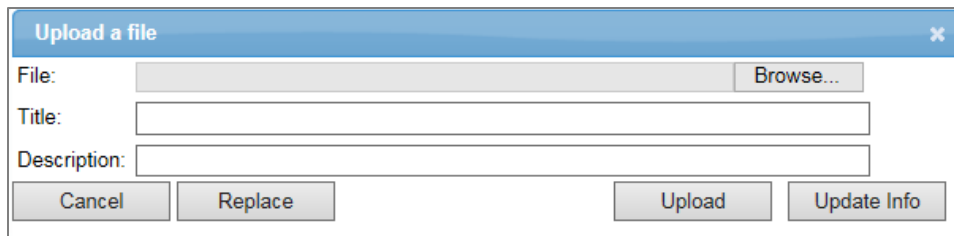
Scan in File

Add URL Link

Add Report Link

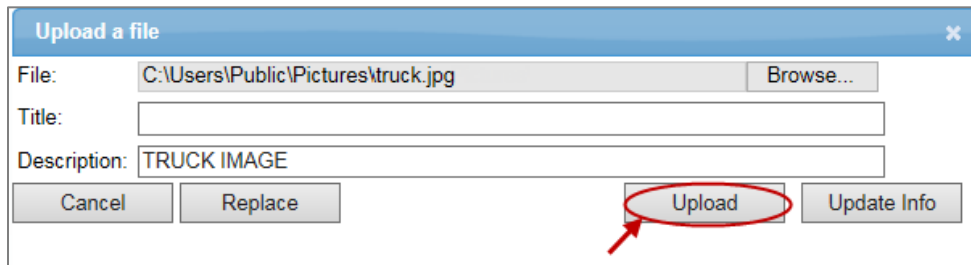
Cancel

The Upload a file dialog displays.



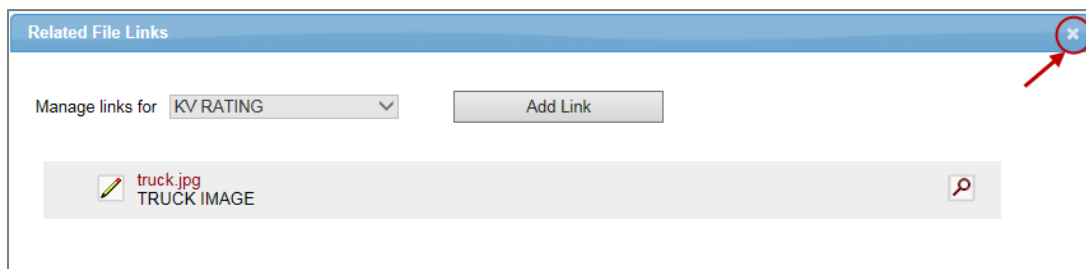
The 'Upload a file' dialog box has a blue header bar with a close button (X) on the right. Below the header, there are three input fields: 'File:', 'Title:', and 'Description:'. The 'File:' field has a 'Browse...' button to its right. At the bottom of the dialog, there are four buttons: 'Cancel', 'Replace', 'Upload', and 'Update Info'.

7. Complete the **File**, **Title**, and **Description** fields as desired and click **Upload**.



The 'Upload a file' dialog box is shown with the 'File:' field containing 'C:\Users\Public\Pictures\truck.jpg', the 'Title:' field empty, and the 'Description:' field containing 'TRUCK IMAGE'. The 'Upload' button is circled in red, and a red arrow points to it from below.

*The Related File Links dialog displays **Resolving URL, please wait....** There is no need to wait. Click the X to close the Related File Links dialog.*



The 'Related File Links' dialog box has a blue header bar with a close button (X) on the right. Below the header, there is a 'Manage links for' dropdown menu set to 'KV RATING' and an 'Add Link' button. Below this, there is a list of file links. The first entry is 'truck.jpg' with a red pencil icon and the description 'TRUCK IMAGE'. A red arrow points to the close button (X) in the top right corner.

You are returned to the Work Order Test Result Test Elements Entry page which displays a file folder that now contains a file.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: **IN PROGRESS** Approved and Closed: ☐

Testing certificate number:

Vendor ID: ... Vendor invoice:

Meter 1: 300 Meter 1 Validation:

Edit Elements
Comments
Notes
Files

Test Elements Entry

KV RATING

Comments:

Result: Not Performed: ☐

Files: **File folder contains a file**

KG TE

Comments:

Result: Not Performed: ☐

Files:

RG TEST ELEMENT

Not Performed: ☐

Cancel Save & Close

8. When you are finished entering test element information, click **Save & Close**.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: **IN PROGRESS** Approved and Closed: ☐

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001 ... Vendor invoice: 45147601

Meter 1: 300 Meter 1 Validation:

Edit Elements
Comments
Notes
Files

Test Elements Entry

KV RATING

Comments:

Result: Not Performed: ☐

Files:

KG TE

Comments:

Result: Not Performed: ☐

Files:

RG TEST ELEMENT

Not Performed: ☐

Cancel **Save & Close**

The Main Work Order Test Results page displays and the newly added test is listed in the Existing Test Results section.

Existing Test Results: 2

Test	Description	Group ID	Started	Status	Approved and Closed
RGTEST3	RG TEST3	N/A	10/21/2015 13:05	IN PROGRESS	N
CN-TEST-TYPE-005	TEST 005	N/A	07/24/2014 15:36	PENDING	N

New Test

Start a New Test: RGTEST3 Start

Close

9. You may now choose to do one of the following options:

- Click the **Close** button to return to the page from which you originated.
- Click the **Start** button to enter data for a new test (and repeat the steps outlined above).
- Click the **Test** button (e.g., **RGTEST3**) to review and edit elements and add more information to the test as outlined in the following [Review and Update Existing Test Results](#) section.

Review and Update Existing Test Results

1. To edit an existing test, click the button for the desired test on the Main Work Order Test Results page as shown in the screenshot below. From this pop-in, click **Delete** to delete a test result.

Test Results - 1-2017-38

Existing Test Results: 2

Test	Description	Group ID	Started	Status	Approved and Closed	Delete
TESTTYPE01	TEST TYPE 01 FOR TIRES	N/A	03/21/2017 11:04 AM	PENDING	N	Delete
TESTTYPE02	TEST TYPE 01 FOR OIL	N/A	03/21/2017 11:04 AM	PENDING	N	Delete

New Test

Start a New Test: TESTTYPE02 Start

Close

The Test Result Details pop-in displays.



The appearance of this page varies based on the test. This page also displays upon clicking the **Test Result** link on the Finish Work Order page.

10. Prior to the test being completed, update basic information, edit elements, add comments and notes as needed.

11. Save your changes.

This page includes several sections including: Basic Info Section, Test Elements Summary Section, and the Function Buttons as outlined below.

Basic Info Section

The Basic Info section shows the test ID, test type, and test due information along the top of the section. The test ID is a link to the Test Results screen. The Basic Info section allows you to enter various test information throughout the testing process.

1. Update the following basic information as desired:

- **Status:** As the test status changes, select the appropriate test status from the drop-down list (PENDING, IN PROGRESS, PASS, PASS CORRECTED, FAILED, PERFORMED, and NOT PERFORMED).
- **Approved and Closed:** Select a date and time from the Date Picker  and check the box to indicate test approval and closure.
- **Testing certificate number:** Enter the test certificate number.
- **Vendor ID and Vendor invoice:** Enter a Vendor ID or click the search button to select a vendor from the list and enter the Vendor invoice number.
- **Meter 1 and Meter 1 Validation:** Enter the meter reading and select the validation from the drop-down list.
- **Comments:** Click the **Comments** button to add comments to the test.

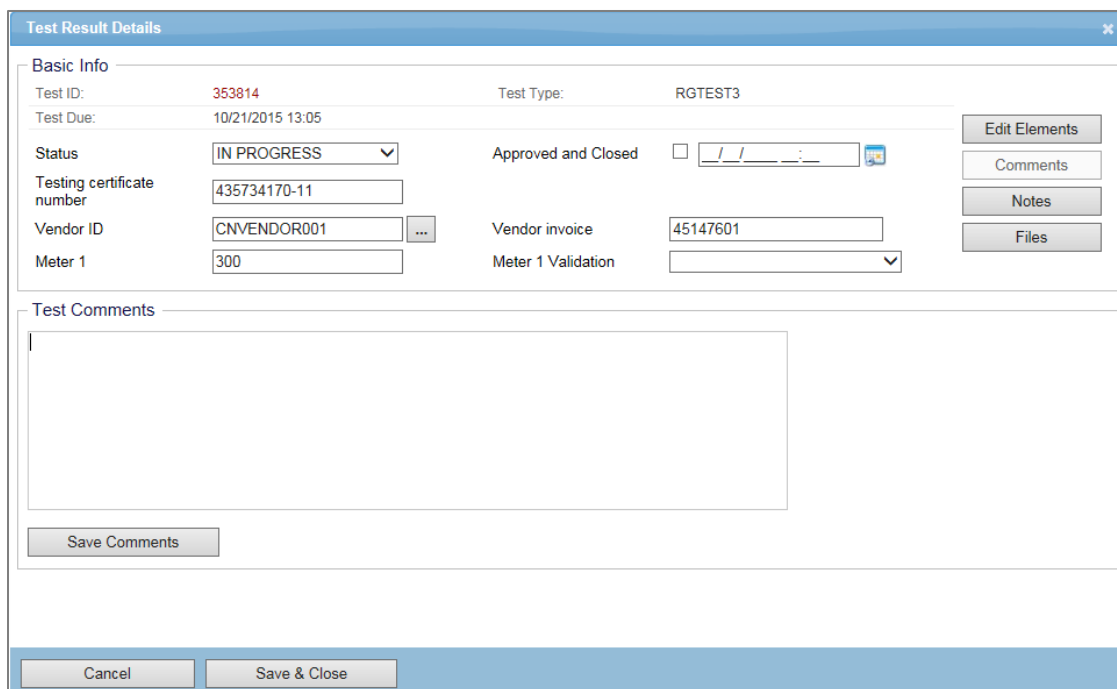


Note: The test result is officially closed when the user checks the **Approved and Closed** checkbox.



Note: The Comments button is highlighted if comments already exist for the test.

The Test Result Details Comments dialog displays:



Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTEST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001

Meter 1: 300

Approved and Closed: ☐ 

Vendor invoice: 45147601

Meter 1 Validation: 

Test Comments

Save Comments

Cancel Save & Close

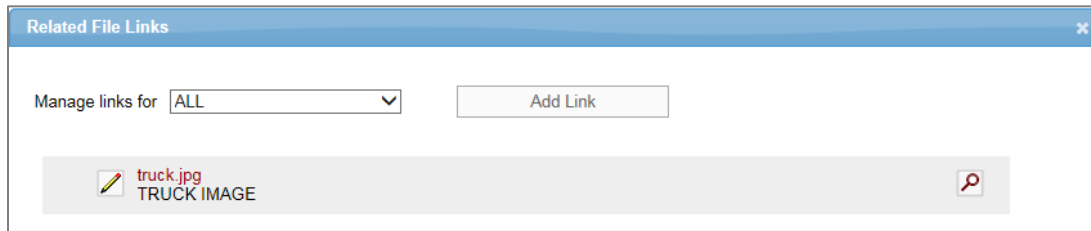
2. If you have test comments, type the comments in the Test Comments area and click one of the following buttons:

- i. Click **Save Comments** to save the comment and return to the Test Result Details page where the **Comments** button is now highlighted,
- ii. Click **Save & Close** to return to the Test Result Existing Test Results page
- iii. Click **Cancel** to return to the previous page without saving the comment.

The Test Result Details page displays Test Notes to allow review of existing notes and add new notes to the test:

3. If you have notes to add, click the **Notes** button to add notes to the test.
 -  Note: Once a note is added, it cannot be edited or deleted.
 -  Note: The **Notes** button is highlighted if notes already exist for the test.
4. Enter a note in the Add New Note area and click one of the following buttons:
 - i. Click **Save New Note** to save the note and return to the Work Order Test Result Test Elements Summary page where the Notes button will now be highlighted
 - ii. Click **Save & Close** to return to the Work Order Test Result Existing Test Results page
 - iii. Click **Back** to return to the previous page without saving the note.
5. Click the **Files** button to add files to the test, and to see files already associated with the test.

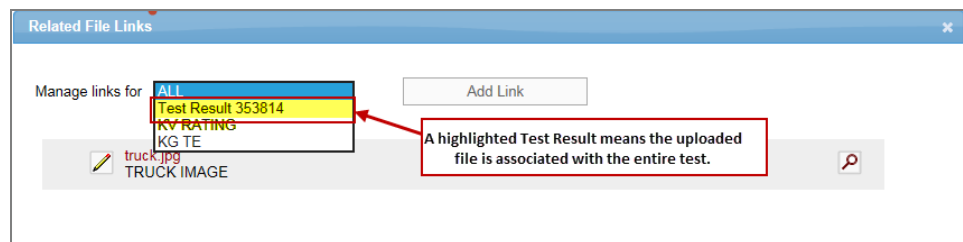
The *Related Files Links* dialog displays:



6. Click the **Manage links for** drop-down arrow to show the test and its elements and how the file is associated to the test.

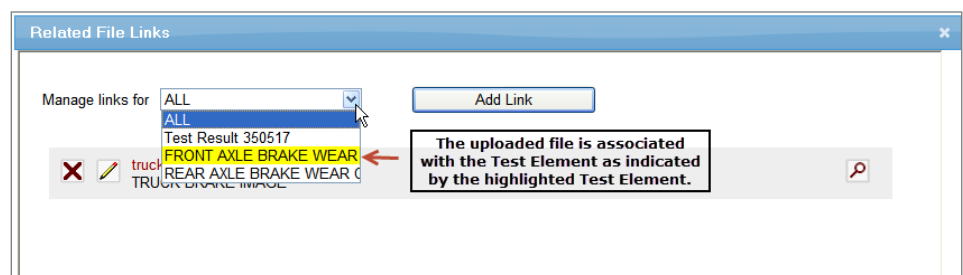
When **Test Result** is highlighted, it means the uploaded file is associated with the entire test as depicted in the following screenshot. A test element is highlighted when it is associated with the file.

- i. Click the **Add Link** button to upload the file as outlined in the [Adding an Associated File](#) section.
- ii. Click **ALL** to associate a file with the entire test. Then select a specific **Test Element** to associate a file with that particular element.
 - If no test element is listed here, the image applies to the entire test.



Files				
Row #	Delete	Test element ID	Path and file name	Des
1	☐		truck image	

- If a test element is listed in the Test element ID field, the file applies only to the specific element.



Files				
Row #	Delete	Test element ID	Path and file name	Desc
1	☐	0 BRAKE - FRONT AXLE	truck image	

7. Click the **X** in the upper-right corner of the Related File Links dialog to return to the Test Elements Summary page.

Related File Links

Manage links for: ALL Add Link

new flyer.bmp

You are returned to the Test Elements Summary page.

Test Result Details

Basic Info

Test ID: 353814 Test Type: RGTST3

Test Due: 10/21/2015 13:05

Status: IN PROGRESS Approved and Closed: ☐

Testing certificate number: 435734170-11

Vendor ID: CNVENDOR001 Vendor invoice: 45147601

Meter 1: 300 Meter 1 Validation:

Edit Elements Comments Notes Files

Test Elements Entry

KV RATING

Comments:

Result: Not Performed: ☐ Files:

KG TE

Comments:

Result: Not Performed: ☐ Files:

RG TEST ELEMENT

Not Performed: ☐

Cancel Save & Close

8. Remember to click **Save & Close** to save your entries.

Test Elements Entry

The Test Elements Entry section lists the Test Element IDs. For each Test Element, you can provide Comments, select a Result (PASS, FAIL, CORR), check if the element was Not Performed, and add Files.

The screenshot shows a form titled "Test Elements Entry" with three sections:

- KV RATING**: Includes a "Comments:" text field, a "Result:" dropdown menu (highlighted in yellow), a "Not Performed:" checkbox, and a "Files:" button with a folder icon.
- KG TE**: Includes a "Comments:" text field, a "Result:" dropdown menu (highlighted in yellow), a "Not Performed:" checkbox, and a "Files:" button with a folder icon.
- RG TEST ELEMENT**: Includes a "Not Performed:" checkbox.

Function Buttons

The screenshot shows two buttons side-by-side: "Cancel" and "Save & Close".

The remaining buttons allow you to perform the following functions:

- **Cancel:** Return to the Main Work Order Test Results page.
- **Save & Close:** Save your entries and return to the Main Work Order Test Results page.

4. Using the Test Results Screen

Test results can be created with the Work Order Test Results pop-in as discussed above, or in the Enterprise Portal screens. After you have created test results and need to review them, or you need to create new test results, use the Test Results screen. With test results that have associated work orders, the work order status must be PENDING, OPEN, or WORK FINISHED.

The screenshot displays the 'Test Results' application interface. At the top, a dark header bar contains the title 'Test Results' and navigation links: 'ADMIN MODE', 'CHANGE REQUEST', 'HELP', and 'PREFERE'. Below the header is a toolbar with icons for 'Search', 'Reload', 'Sort', and a 'Select Filter' dropdown. To the right of these are buttons for 'New', 'Copy', 'Delete', 'Edit', 'Save', 'Cancel', and 'Export'. A 'Select Sort' dropdown is also present. The main content area is divided into a left sidebar and a central panel. The sidebar lists navigation options: 'Basic Info' (highlighted), 'More Info', 'Test Results', 'Test Equipment', 'Comments', 'Notes', and 'Files'. The central panel, titled 'Basic Info', contains a form with various input fields and a status dropdown. The form fields include: 'Equipment ID', 'Test type ID', 'Meter 1', 'Meter 1 validation', 'Meter 2', 'Meter 2 validation', 'Date and time of test', 'Date and time due', 'Test location ID', 'Employee ID', 'Work order ID', and 'Task ID'. The 'Status' dropdown is set to 'PENDING'. There are also checkboxes for 'Closed' and 'Approved', and a 'By user' field.

Test ID	
Test ID	

Basic Info

More Info

Test Results

Test Equipment

Comments

Notes

Files

Equipment ID

Test type ID

Meter 1

Meter 1 validation

Meter 2

Meter 2 validation

Date and time of test

Date and time due

Test location ID

Employee ID

Work order ID

Task ID

Status

Closed

Approved

By user

Test Results Information

- Test results are required only if the test type has an equipment class setup that matches the equipment unit's equipment class, and that equipment class is required to have a test result. If the test type does not require a test result, test results do not need to be completed before the work order is finished or closed.
- Whether a test must be closed as a condition of completing the work order is specified on the Procedures tab of the Class/Task Information screen. Test results do not need to be closed when closing a work order if the test type is classified as FEEDBACK or ATTRIBUTE.
- If mobile software is installed, you can use hand-held devices to transfer test result information between the application and the hand-held devices to work with the data from remote locations. Refer to the related mobile device documentation for these products.

To create test results:

1. From the Enterprise Portal menu, open the Test Results screen.
2. At the top of the screen, click **New**.
3. Complete the Test Results screen with all necessary information.
4. If needed, click the **Help** button at the top of the screen for more information about filling out the page.
5. When you are done filling out the information, click **Save**.

To review test results:

1. From the Enterprise Portal menu, open the Test Results screen.
2. Click the **Search** button to filter for test results by test ID, equipment ID, or several other filter options, then click Apply Filter.

The Filter dialog box is divided into two main sections: 'Current filter choices' and 'Named Filters'.

Current filter choices:

- Test ID: [Text Input]
- Equipment ID: [Text Input] SRV%
- Test type ID: [Text Input]
- Work order location ID: [Text Input]
- Work order year: [Text Input]
- Work order number: [Text Input]
- Status: [Dropdown Menu] (Options: PENDING, IN PROGRESS, PASS, PASS CORRECTED, FAIL, PERFORMED)
- Closed: [Text Input]
- Date and time closed: [Text Input]
- Approved: [Text Input]
- Date and time approved: [Text Input]
- Task ID: [Text Input]
- Part ID: [Text Input]
- Part suffix: [Text Input]
- From hand-held device: [Text Input]
- Line ID: [Text Input]

Named Filters:

- [Empty List Box]
- [Delete Selected Filter] button
- ☐ Is Default Filter
- [Save As] button

Buttons: Cancel, Clear Filter, Close, Apply Filter (highlighted with a red circle).

3. Select the test result you want to view from the grid.

The Test Results screen displays a table of test results. The table has the following columns: Row #, Test ID, Equipment ID, Test type ID, Date and time of test, and Date and time due.

Row #	Test ID	Equipment ID	Test type ID	Date and time of test	Date and time due
1	3	SRV%	PENDING	10/02/2006 16:54	10/02/2006 16:54
2	4	SRV%	PENDING	10/03/2006 03:55	10/03/2006 03:55
3	6	SRV%	PENDING	10/03/2006 08:06	10/03/2006 08:06
4					

Row 2 is highlighted with a red circle.

4. View or edit the information needed.
5. When you are done, exit the screen or click **Save** if any information was edited.