Version 25 | Trapeze Enterprise Asset Management

Test Results

Reference Guide

Trade Secret | February 2025

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

Contents

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.

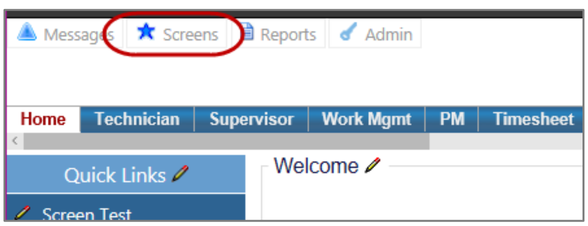
The following document describes how to set up and use test results.

Accessing Screens

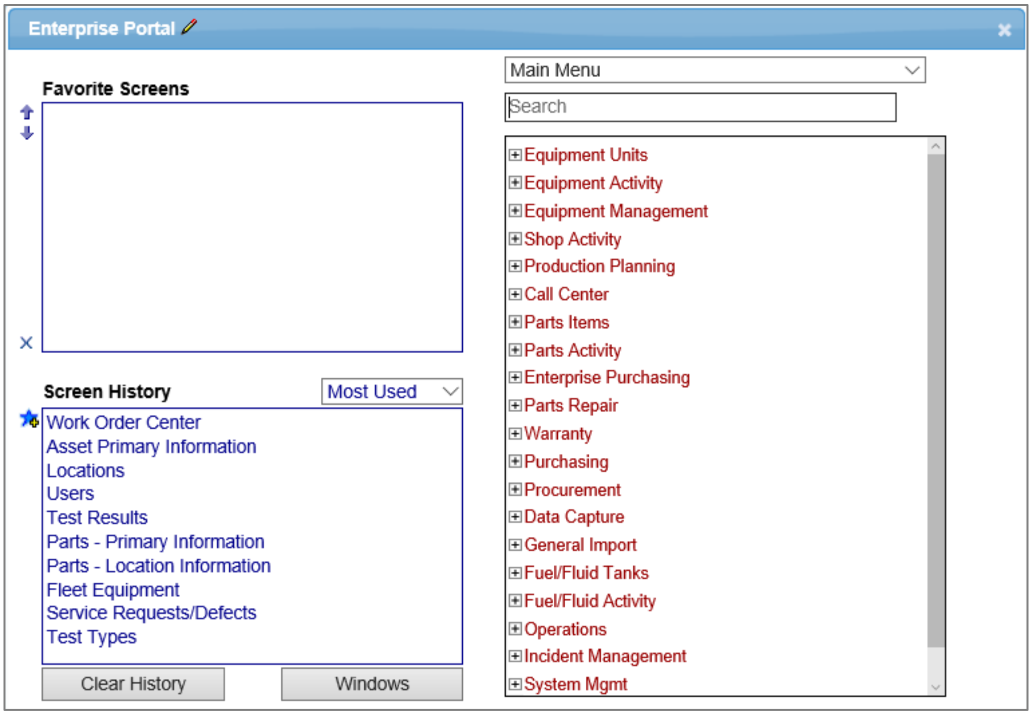
The Enterprise Portal screens allow users to set up key components for test results.

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:

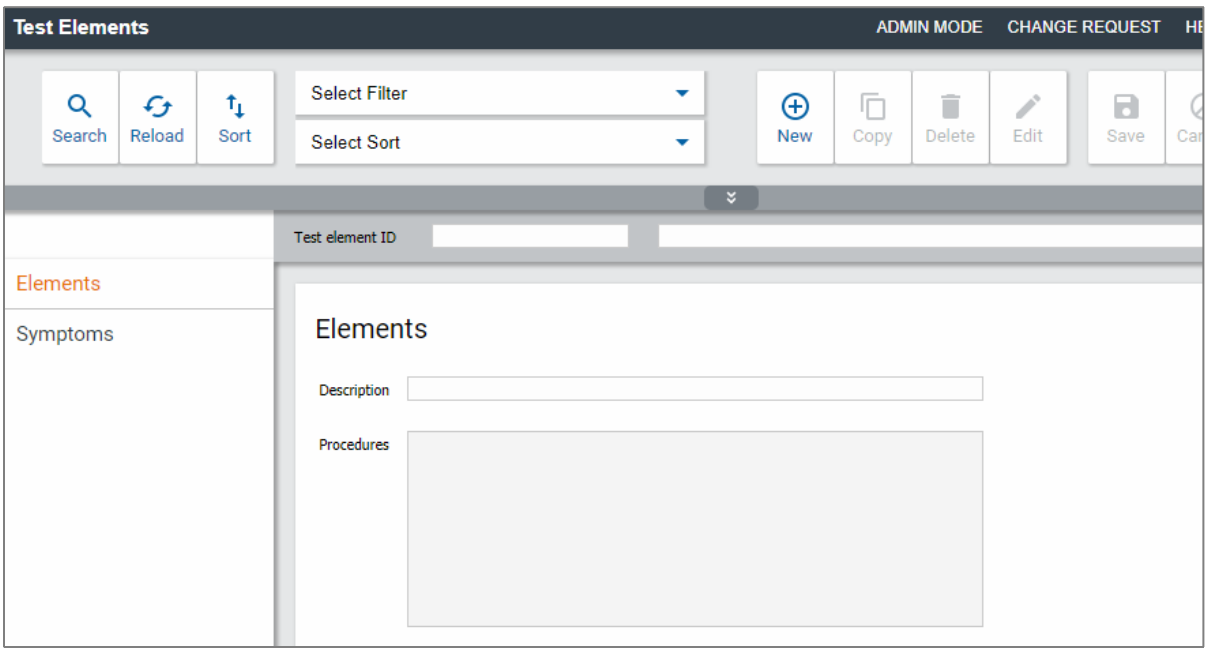
   - Use the **Search** field to search for the correct screen
   - Click through the list of red links to find the screen you need to open.

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.

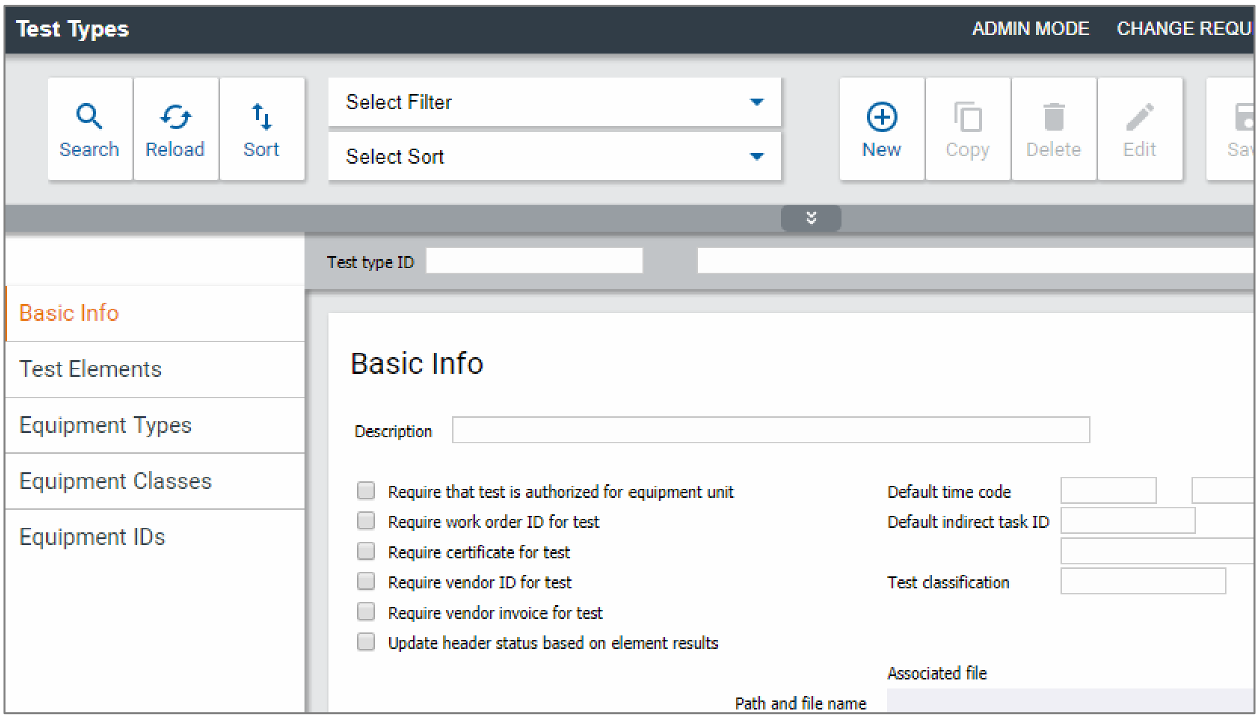


To create test elements:

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.

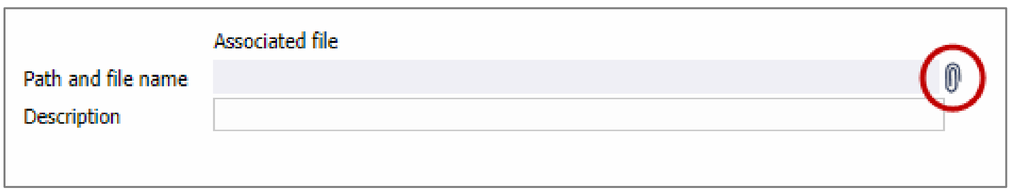
Adding an Associated File

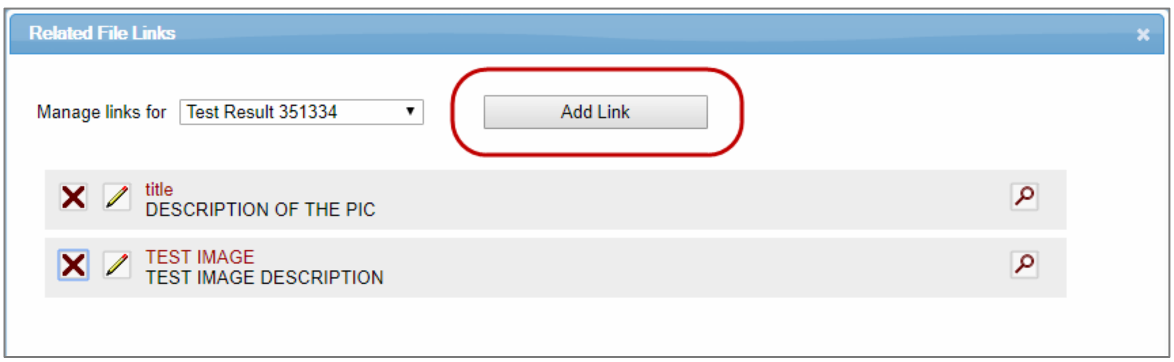
Use associated files to add more information to an item.

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.

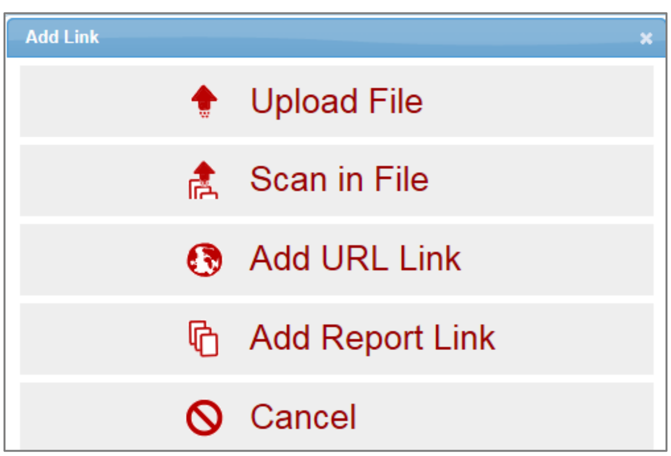
To add a link:

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





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

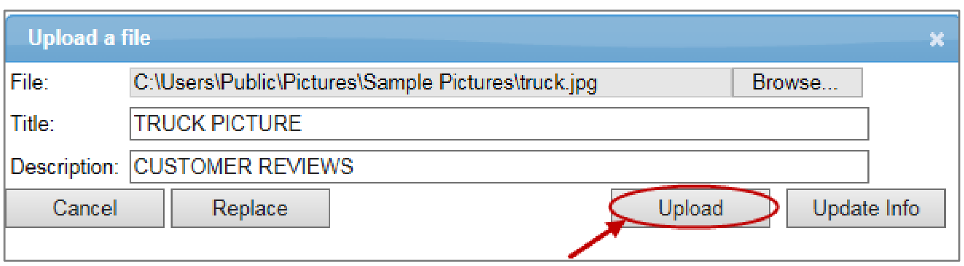
  Note: For report links, farpt:/// is automatically added to the file name when you save.

- **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.

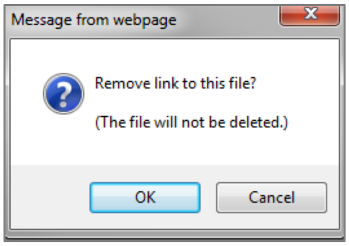


*The file displays in the **Related File Links** section.*

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.

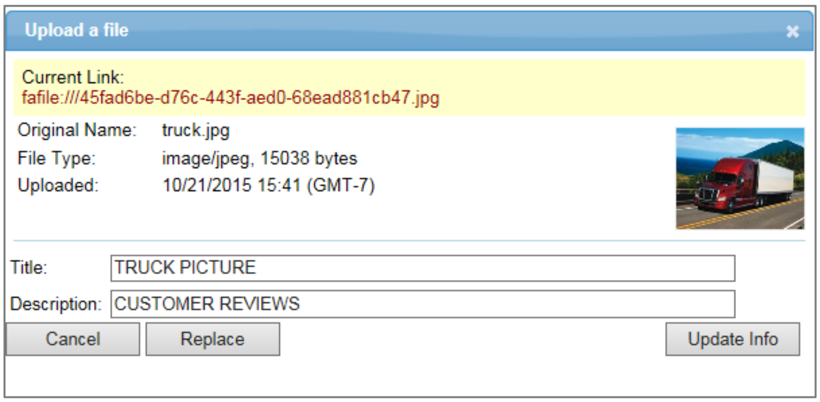
   A dialog will confirm that you want to remove the link to the file.



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.

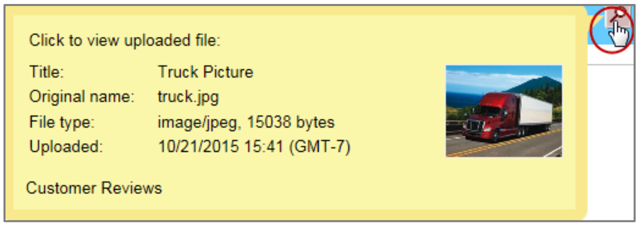
      b. Click **Yes.**

      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.

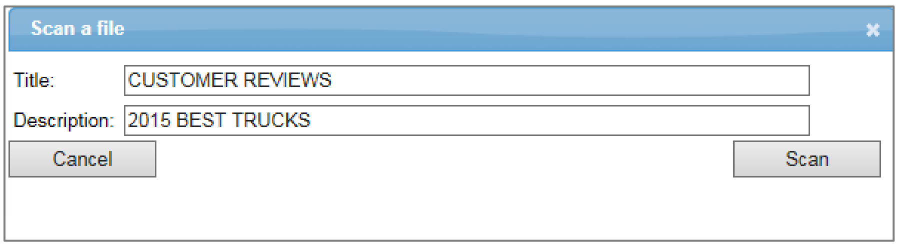
   iii. **Update Info:** Allows you to update the title and/or description. Enter the correct information and click the **Update Info** button.

      a. Hover over the zoom icon to view the file information and click the zoom icon to go to the file.



Scan in File

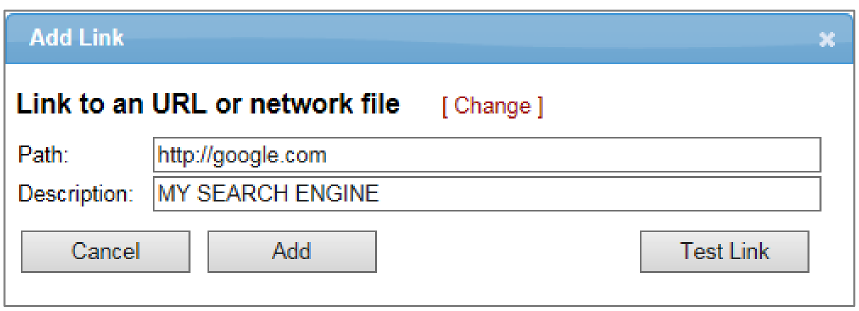
Upon clicking **Scan**, the ActiveX control uses a scanner to scan and upload an image. If the ActiveX control is not loaded, the **Scan** button is disabled.



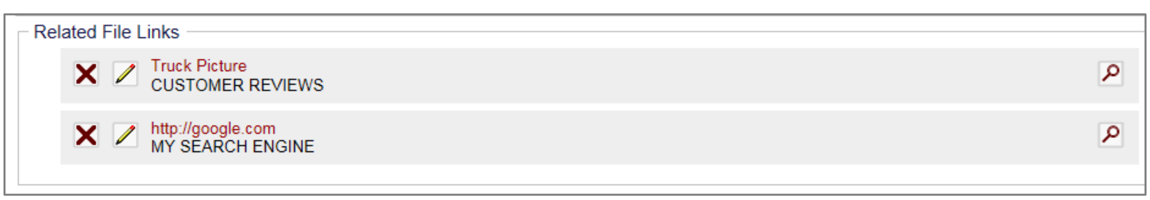
Add URL Link

1. Enter Path and Description and click **Test Link** to test the link.

2. Then click **Add** to add the link.



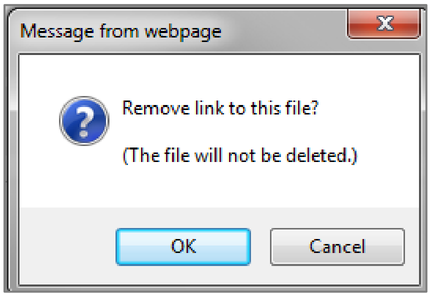
The URL link displays in the Related File Links section:



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

1. Click the icon to delete the link.

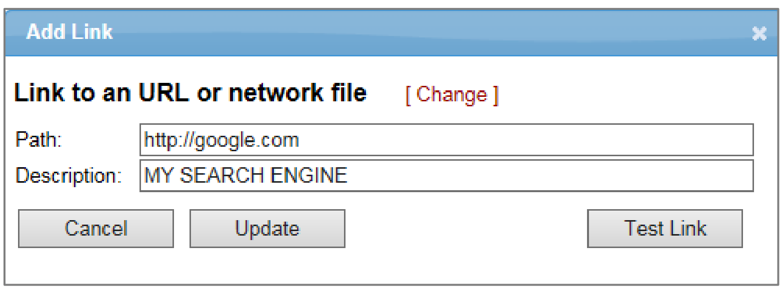
   A dialog will confirm that you want to remove the link.



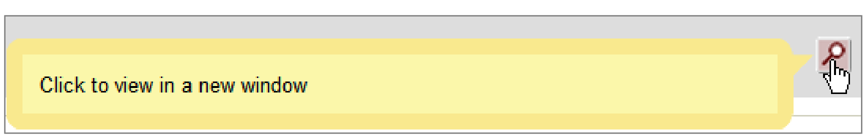
2. Click **OK** to remove the link.

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).

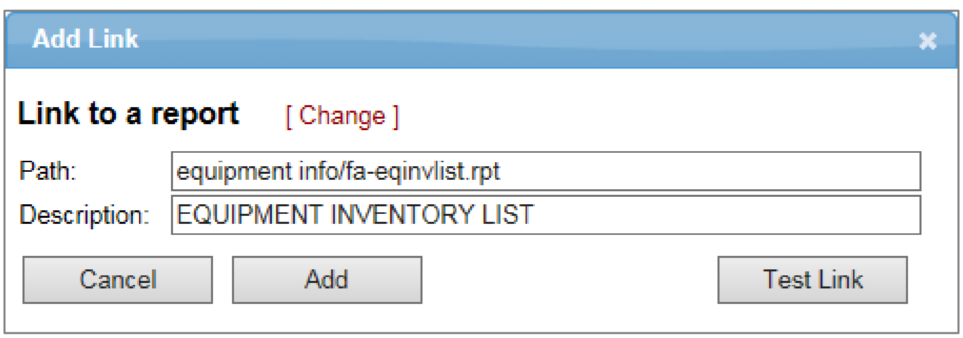
   For example:

   - http://host/icapp/reporting/Shop Activity/Work Order Detail.rpt

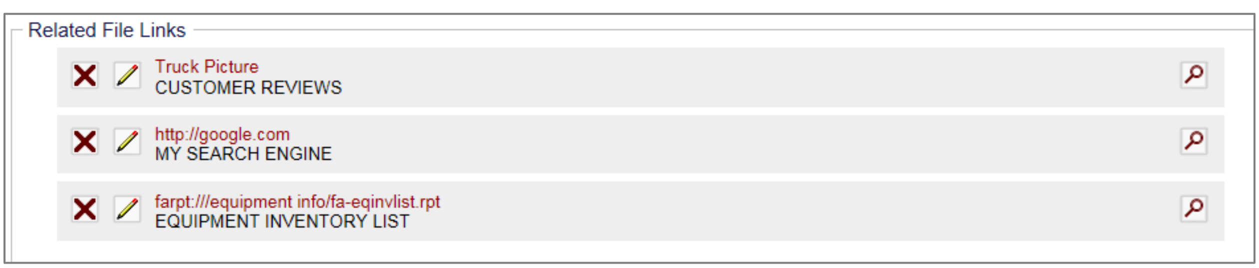
     becomes

   - 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.



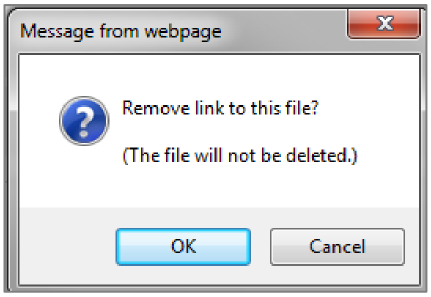
   The report link displays in the **Related File Links** section:



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

1. Click the  icon to delete the link.

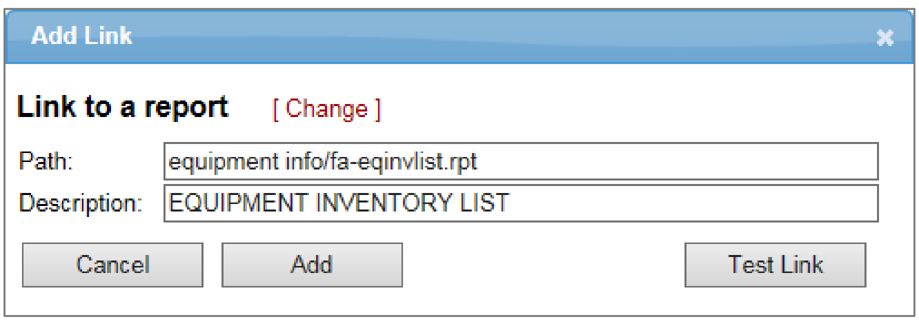
   A dialog will confirm that you want to remove the link.



2. Click **OK** to remove the link.

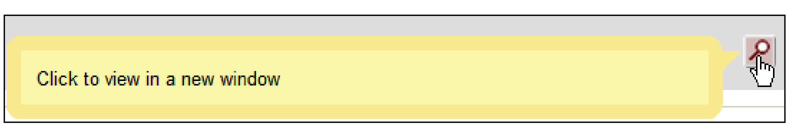
3. Click the pencil  icon to update the link.

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



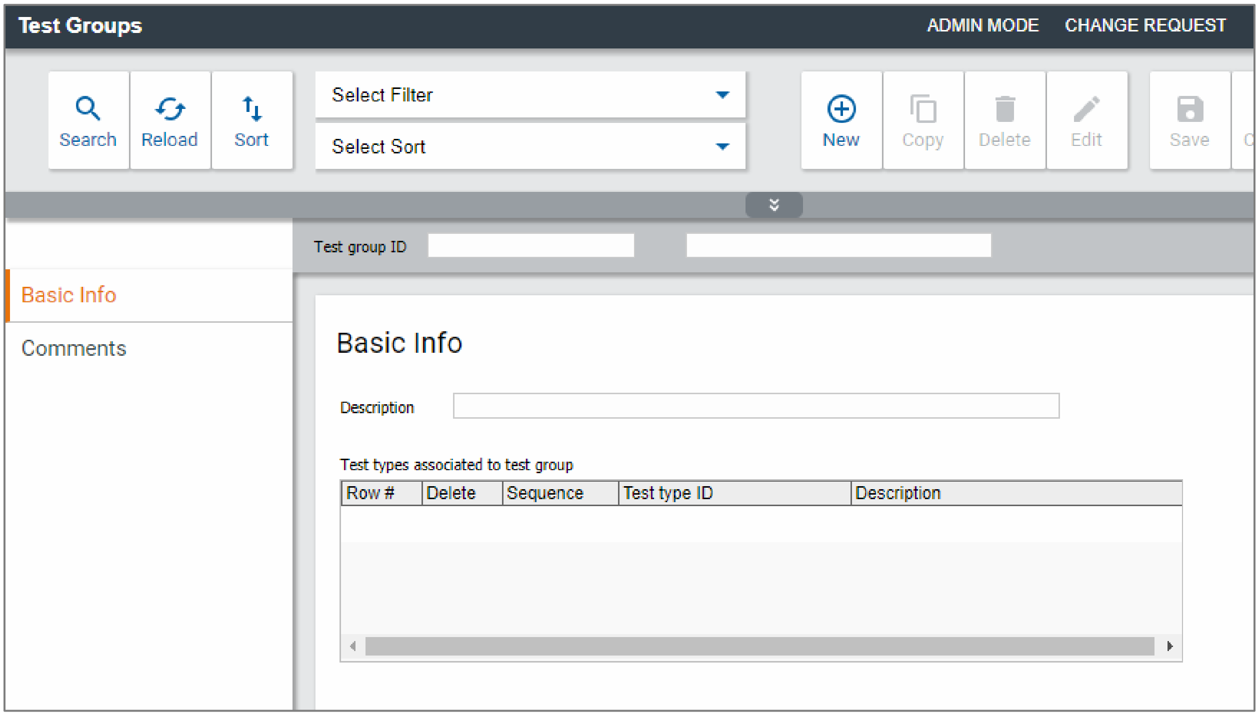
   - Change – Allows you to select a different type of link.
   - Add - Enter the correct information and click the Add button.
   - Test Link – Allows you to test the link.
   - Cancel - Closes the dialog. You can also press Esc or click the X in the top right corner.

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.



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**.

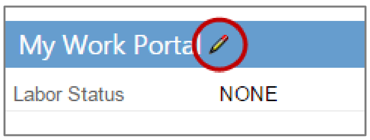
Portal Test Results Settings

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:

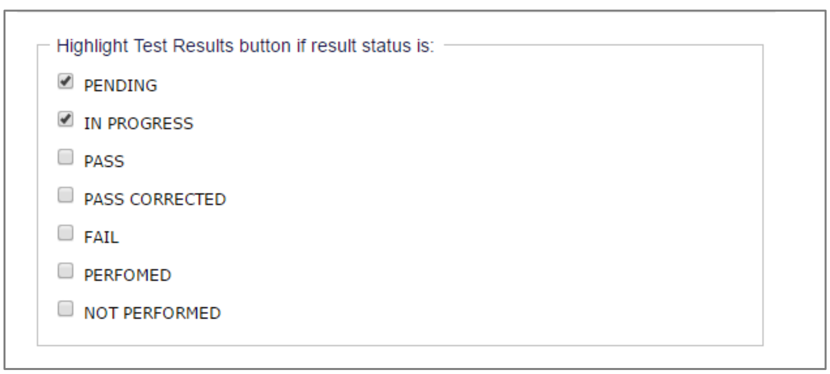
1. Open the Shop Activity portal you have access to.
2. Click the edit pencil to the right of the portal name.



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.

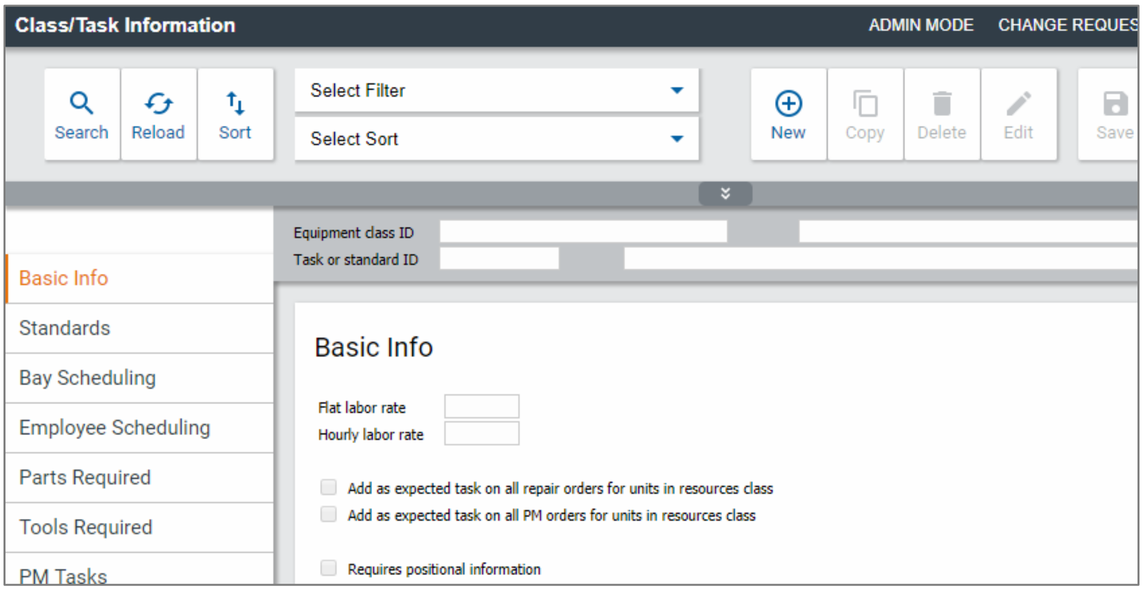


PM Checklists

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.

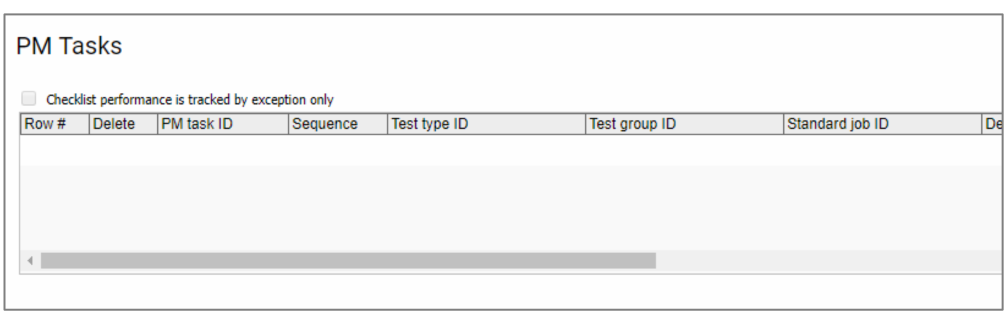


2. Search for the equipment class or PM service task (or both).

3. Click **Edit**.

4. Enter the required information on the Class/Task screen's PM Tasks tab:

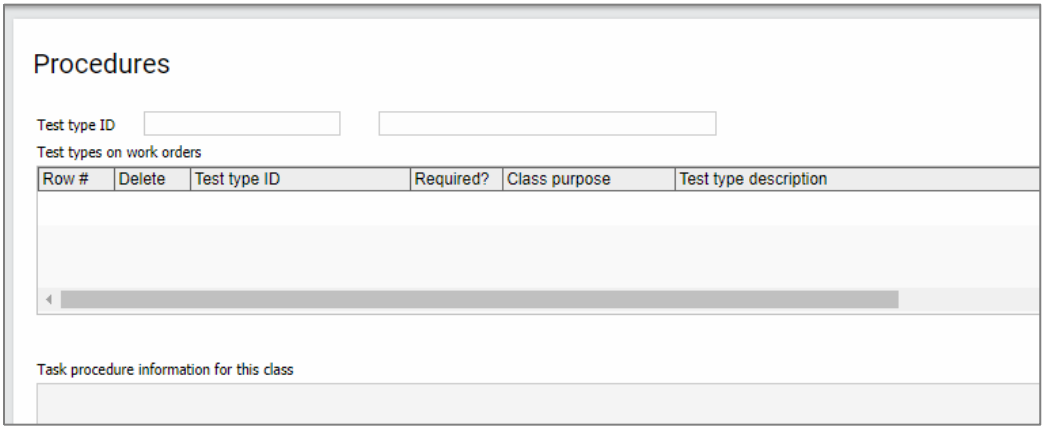
   Use this tab to define a checklist of PM tasks to be included in a specific task or standard ID. PM tasks may include items such as oil and filter changes or checking components.



   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.



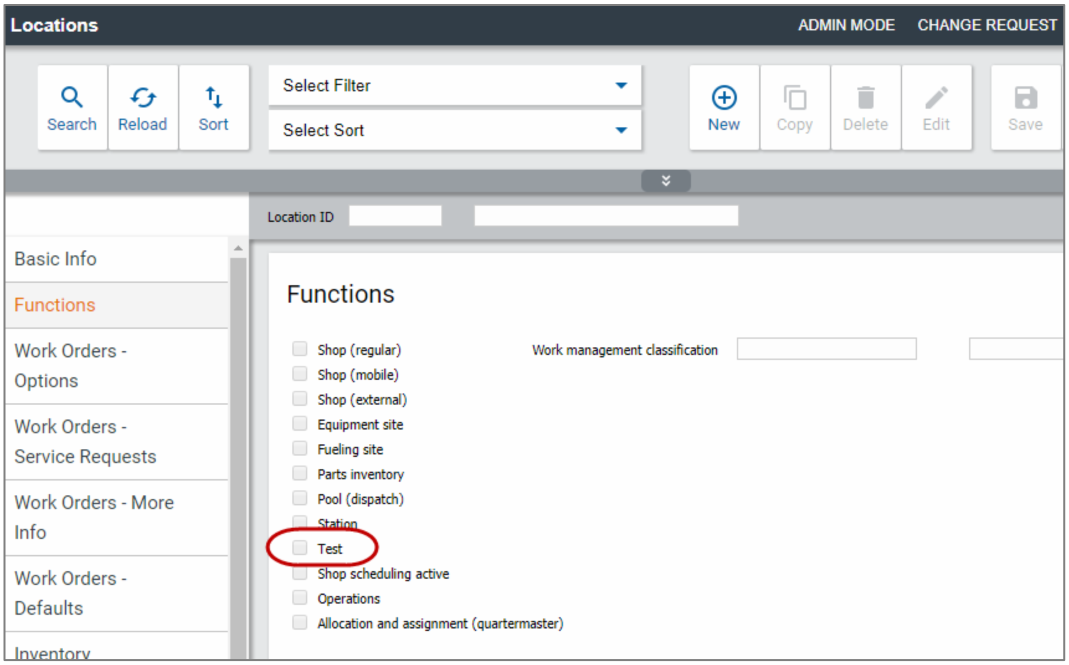
   i. Add the **Test type ID** or **Test group ID** that needs to be on the PM checklist. This is required for the system to automatically generate test results when a PM checklist is added to a work order.

   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.

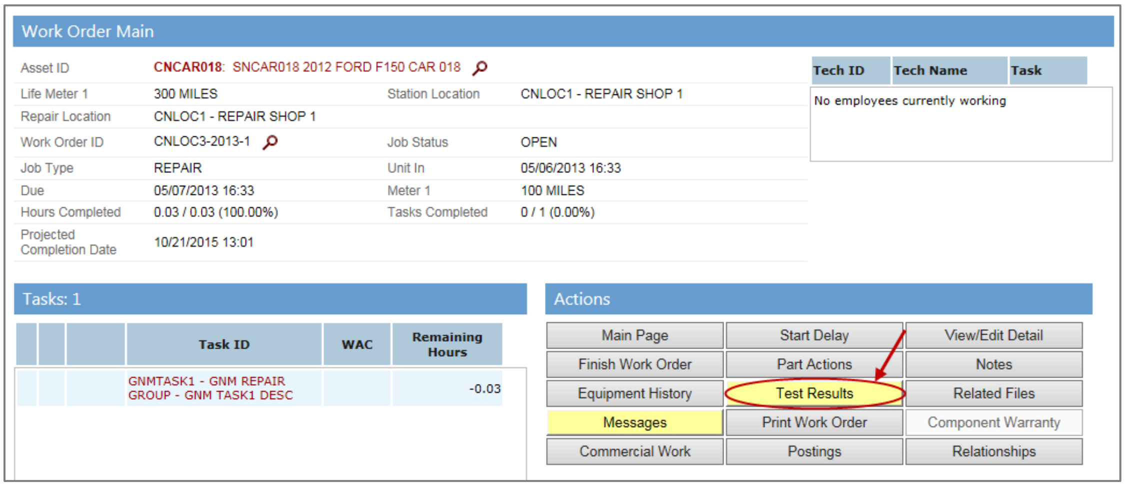

Locations
ADMIN MODE
CHANGE REQUEST
Search
Reload
Sort
Select Filter
Select Sort
New
Copy
Delete
Edit
Save
Location ID
Basic Info
Functions
Work Orders - Options
Work Orders - Service Requests
Work Orders - More Info
Work Orders - Defaults
Inventory
Functions
Shop (regular)
Shop (mobile)
Shop (external)
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

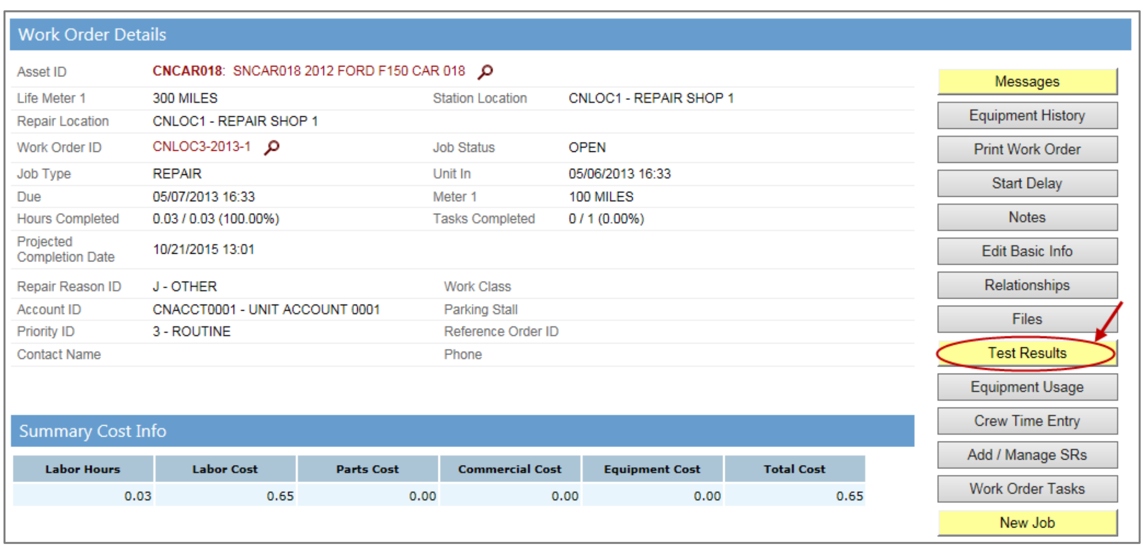
Following is an overview of how to use the Test Results pop-in to begin new tests, edit existing tests, and add files, URLs, and report links to tests and test elements.

To start a new test or view test results:

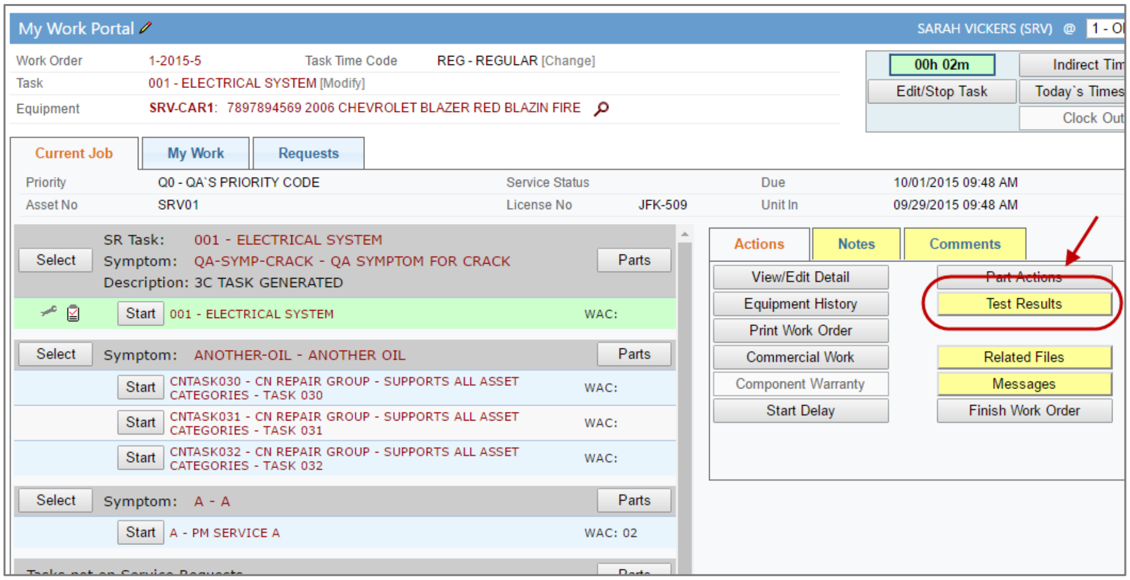
1. Click the **Test Results** button on the Work Order Main and Work Order Details pages or click the **Test Details** button on the Work Order Details page to go to the Test Results pop-in. Also, on the Technician portal, if you are jobbed-on to a task, the **Test Results** button displays on the right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



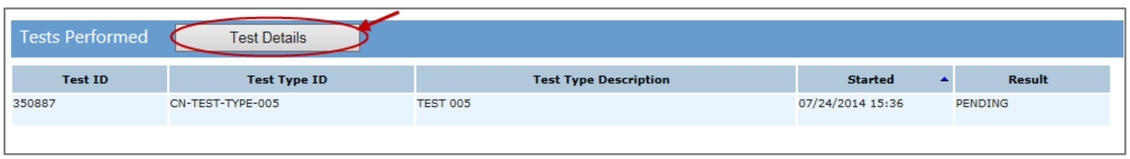
*Work Order Main Page **Test Results** Button*



*Work Order Details **Test Results** Button*

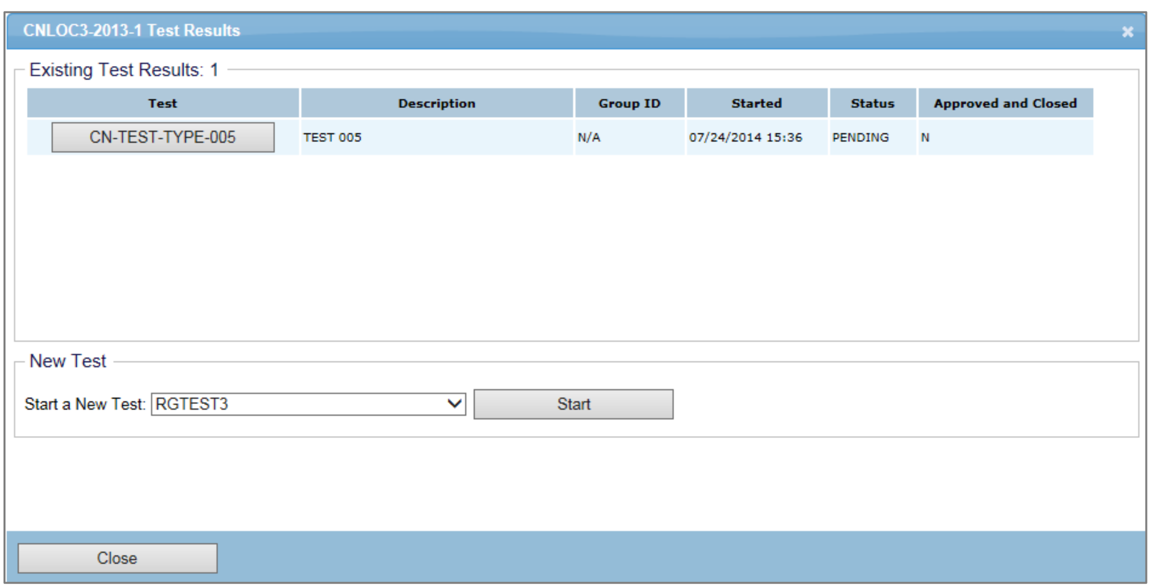


Test Results *button in the Current Job tab in the Technician portal.*



Work Order Details ***Test Details*** *Button*

The Test Results pop-in displays.



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.

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

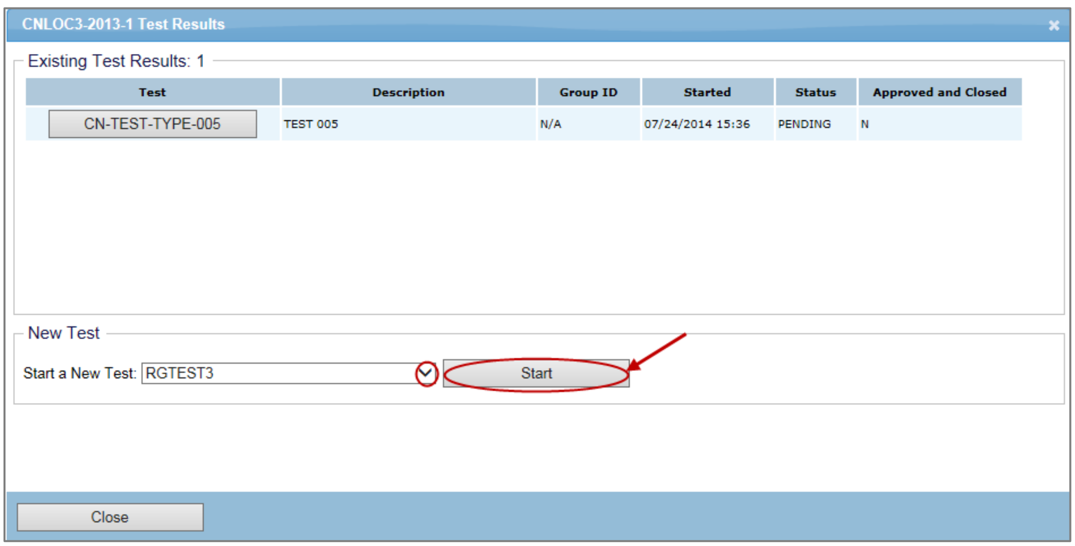
- If existing tests are listed, click on a button in the **Test** column to open the Test Result Details Test Elements Summary page (as outlined in the Review and Update Existing Test Results section).
- Otherwise, to begin a new test, follow the instructions in the next section, Start a New Test.

Start a New Test

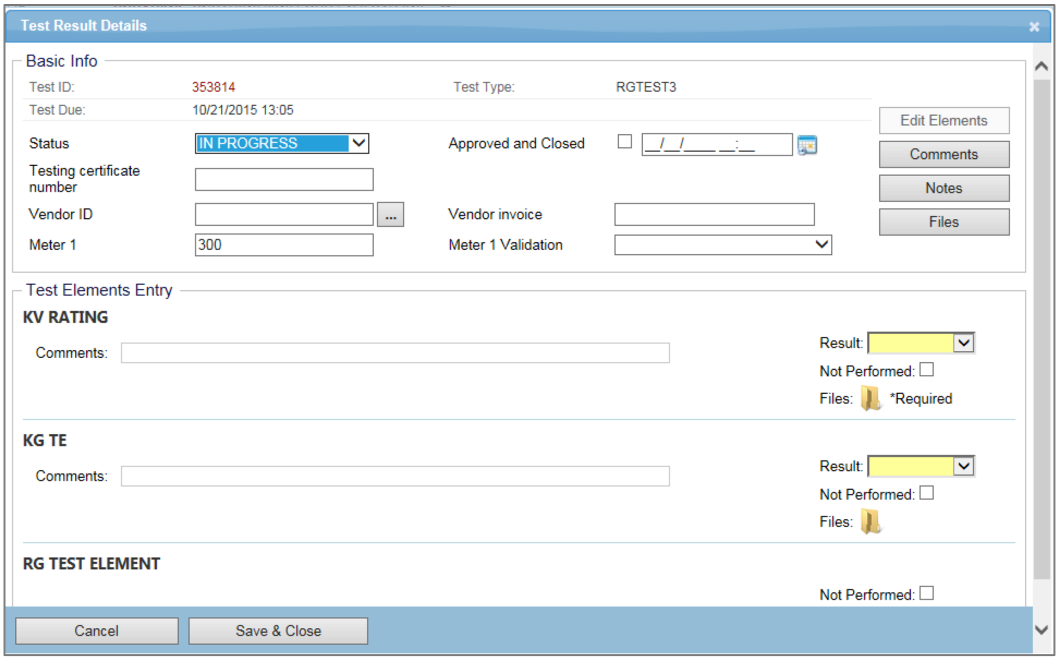
Note: If no tests display in the **Start a New Test** drop-down menu, the record for this test type may need to be associated with the appropriate information. On the Test Types screen, make sure the Equipment Types, Equipment Classes, and Equipment IDs are correctly associated to the equipment types,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

To being a new test:

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

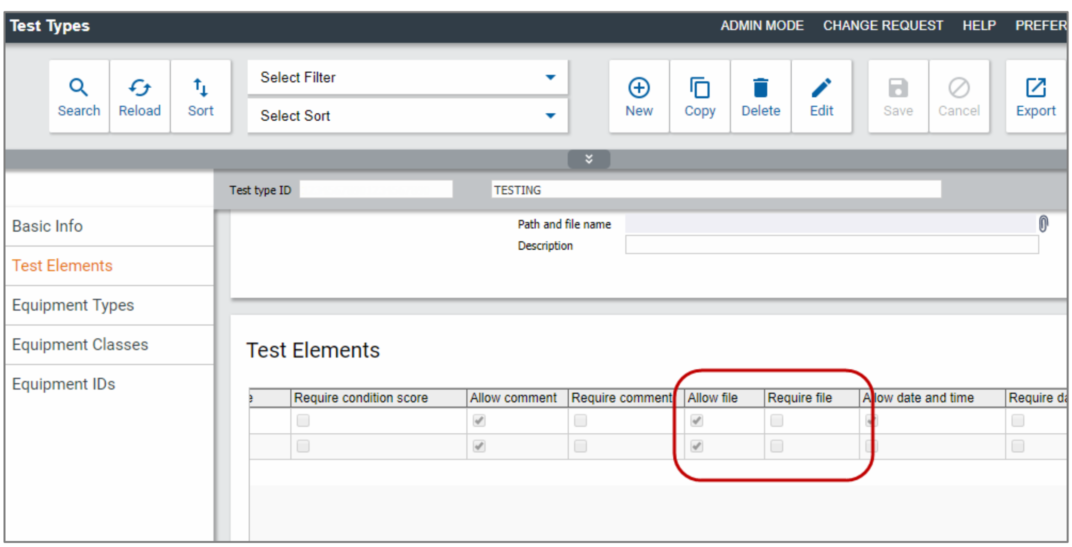


The Test Result Details test elements entry pop-in displays.



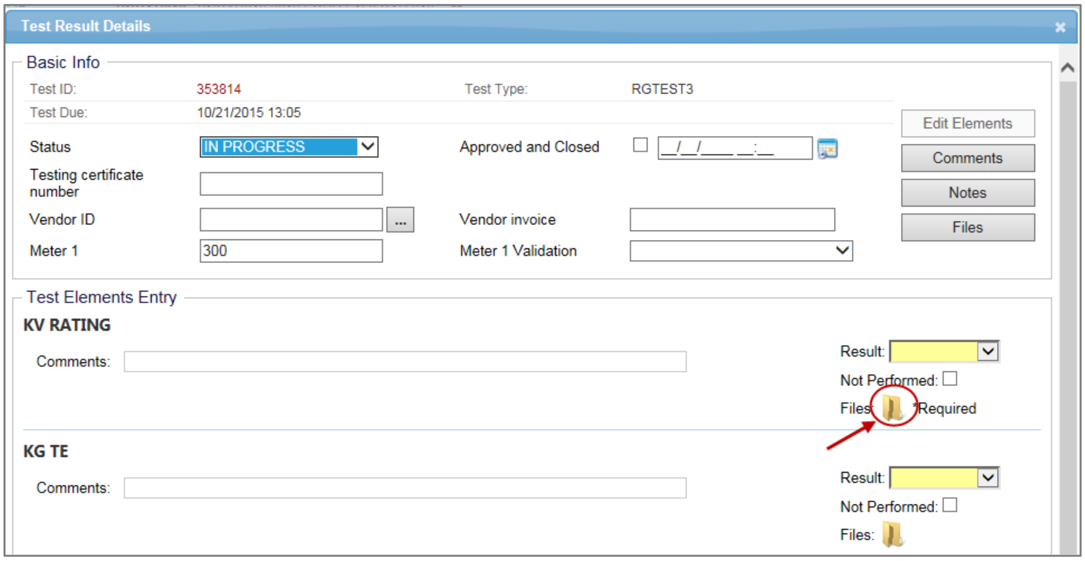
Note: The Test Elements Entry page will vary in appearance based on the Test and options you have chosen for the test types and test elements.

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.

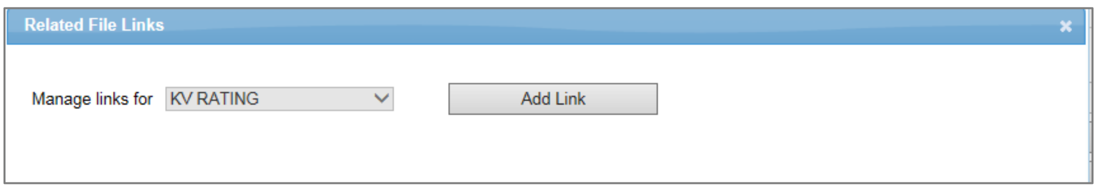


4. In this example, the KV Rating Element requires a file while the KG TE Element allows a file to be uploaded if desired.

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

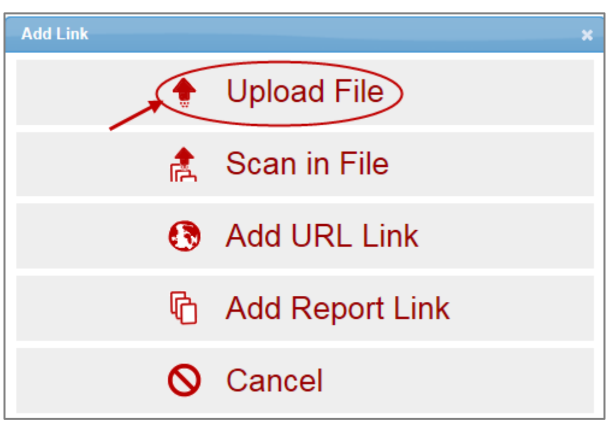


The Related File Links dialog displays.

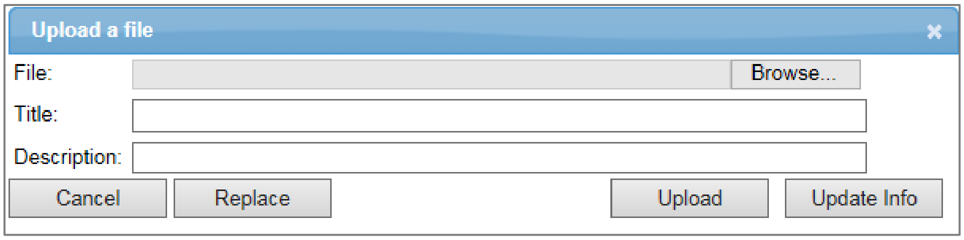


5. The **Manage links for** drop-down selection is already grayed-out with the particular test element selected. Click **Add Link**.

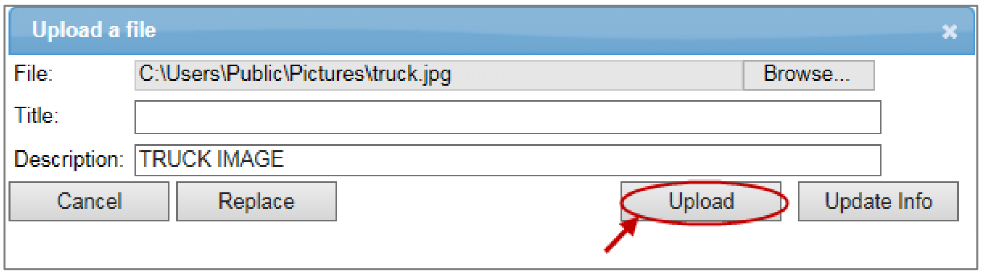
6. To upload a file, select **Upload File**.



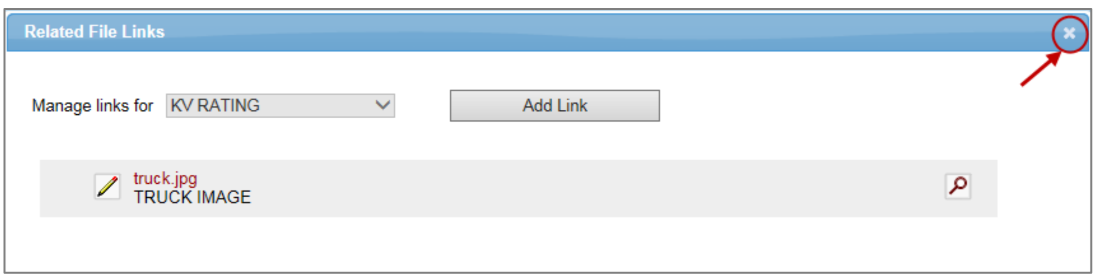
The Upload a file dialog displays.



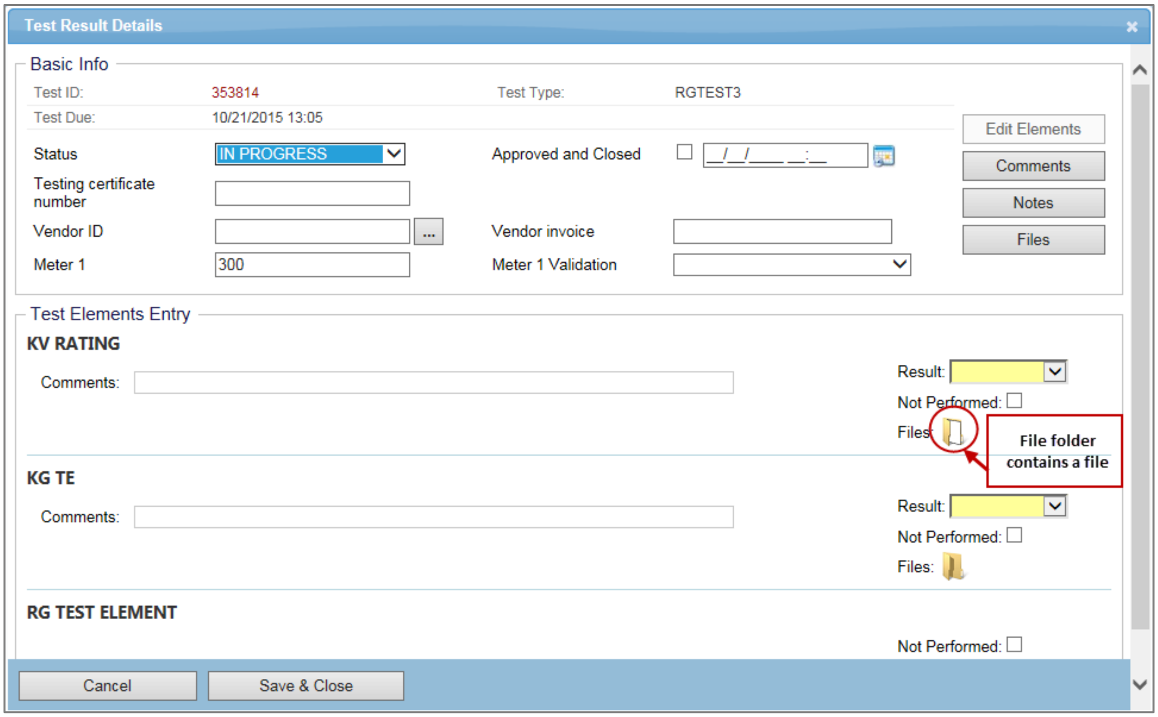
7. Complete the **File**, **Title**, and **Description** fields as desired and click **Upload**.



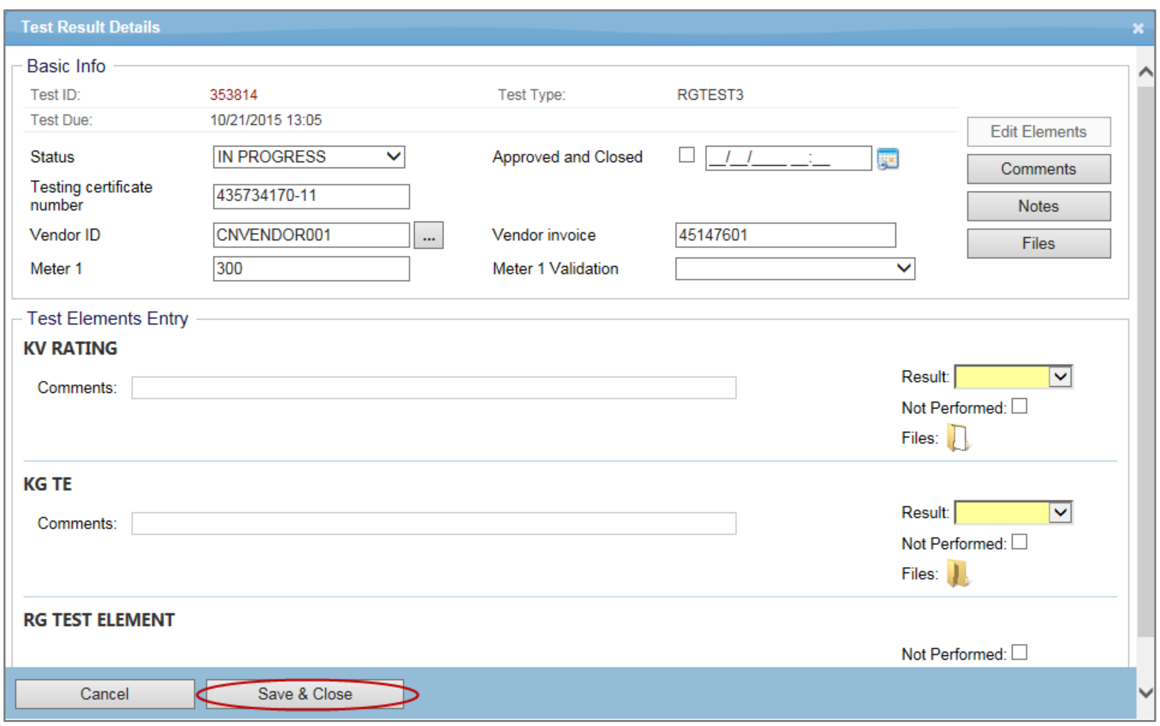
The Related File Links dialog displays ***Resolving URL, please wait…****. There is no need to wait. Click the X to close the Related File Links dialog.*



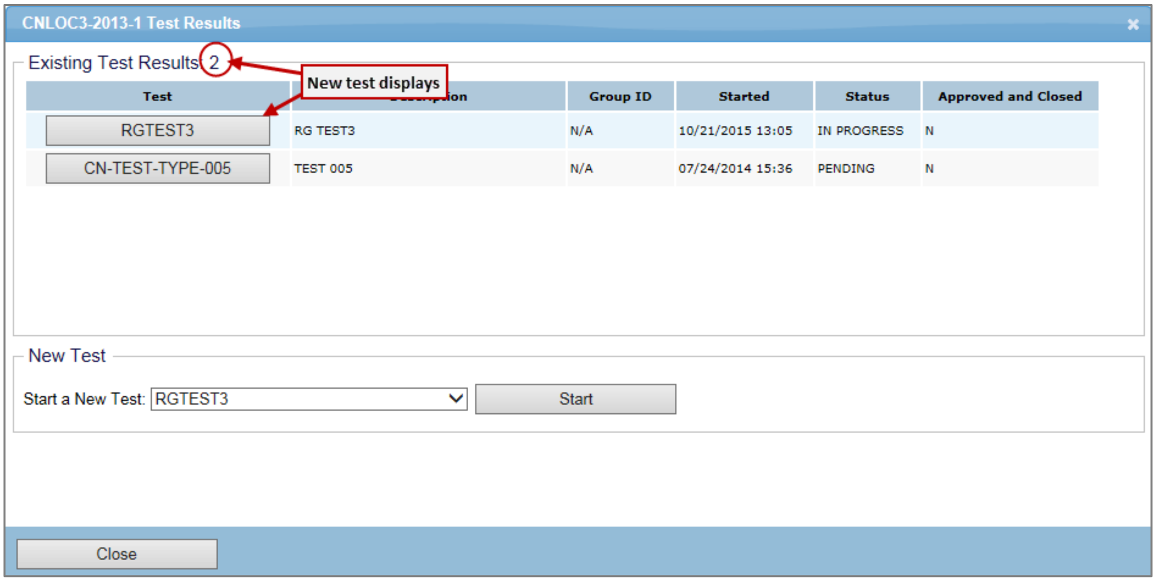
You are returned to the Work Order Test Result Test Elements Entry page which displays a file folder that now contains a file.



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



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

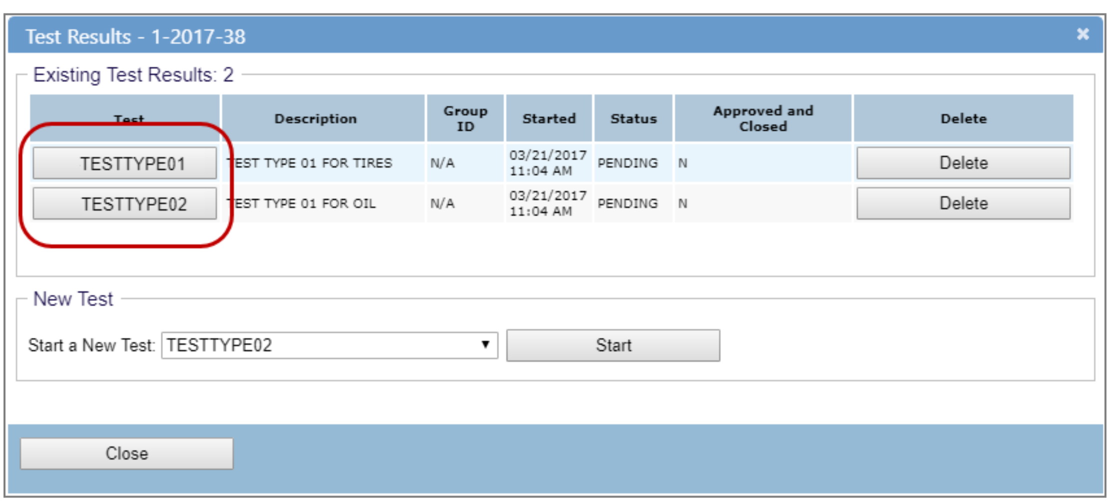


9. You may now choose to do one of the following options:

   - 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.

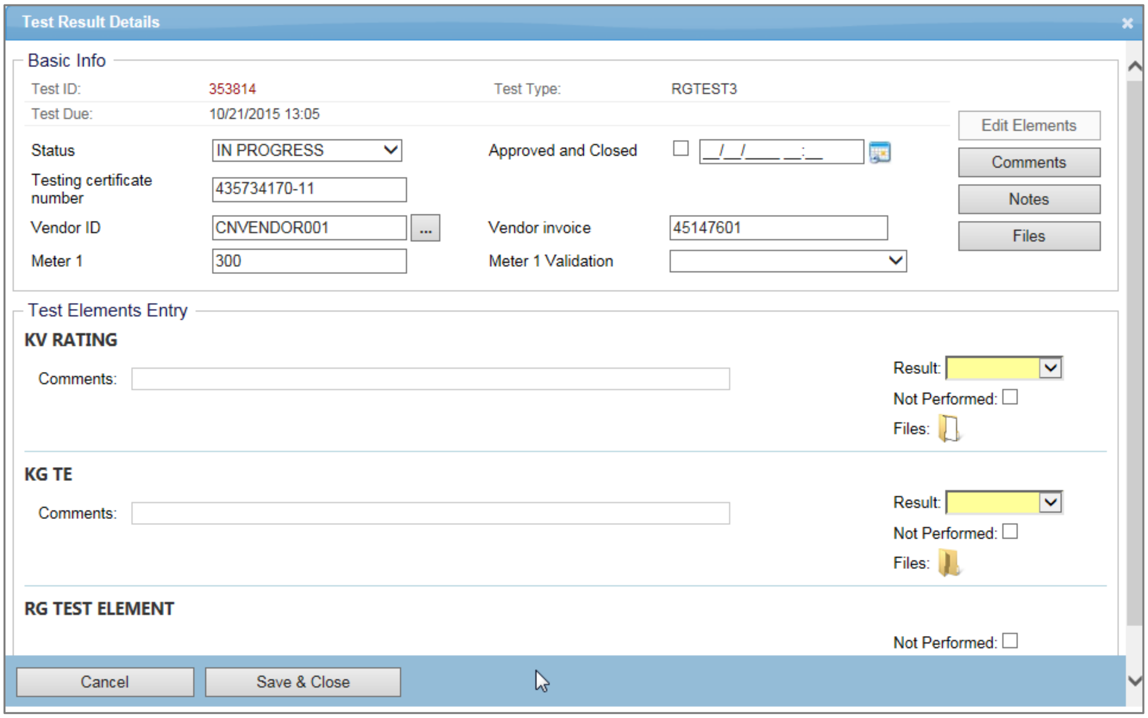
Review and Update Existing Test Results

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.



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.



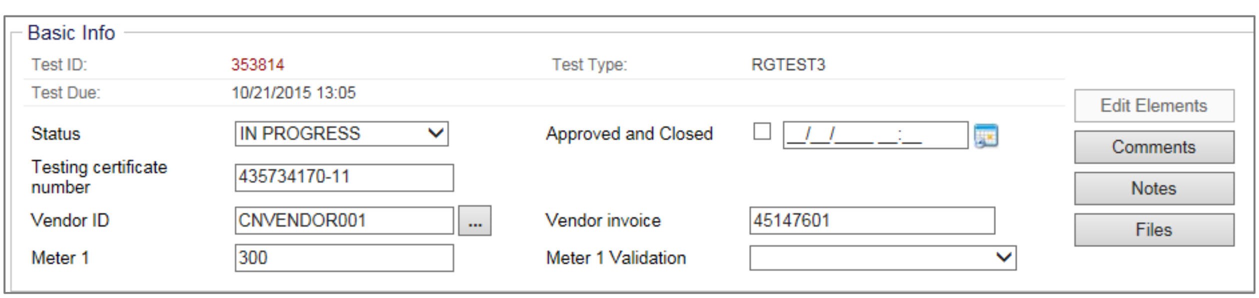
10. Prior to the test being completed, update basic information, edit elements, add comments and notes as needed.

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.

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

    - **Testing certificate number:** Enter the test certificate number.

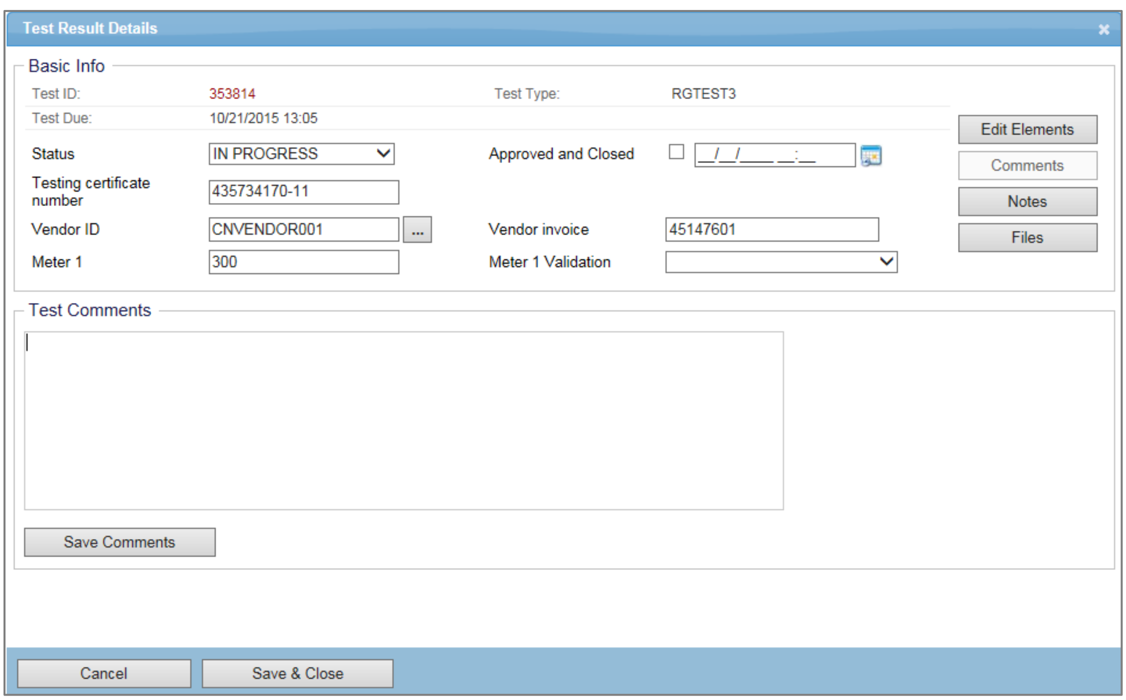
    - **Vendor ID and Vendor invoice:** Enter a Vendor ID or click the search button to select a vendor from the list and enter the Vendor invoice number.

    - **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 Comments button is highlighted if comments already exist for the test.

    The Test Result Details Comments dialog displays:



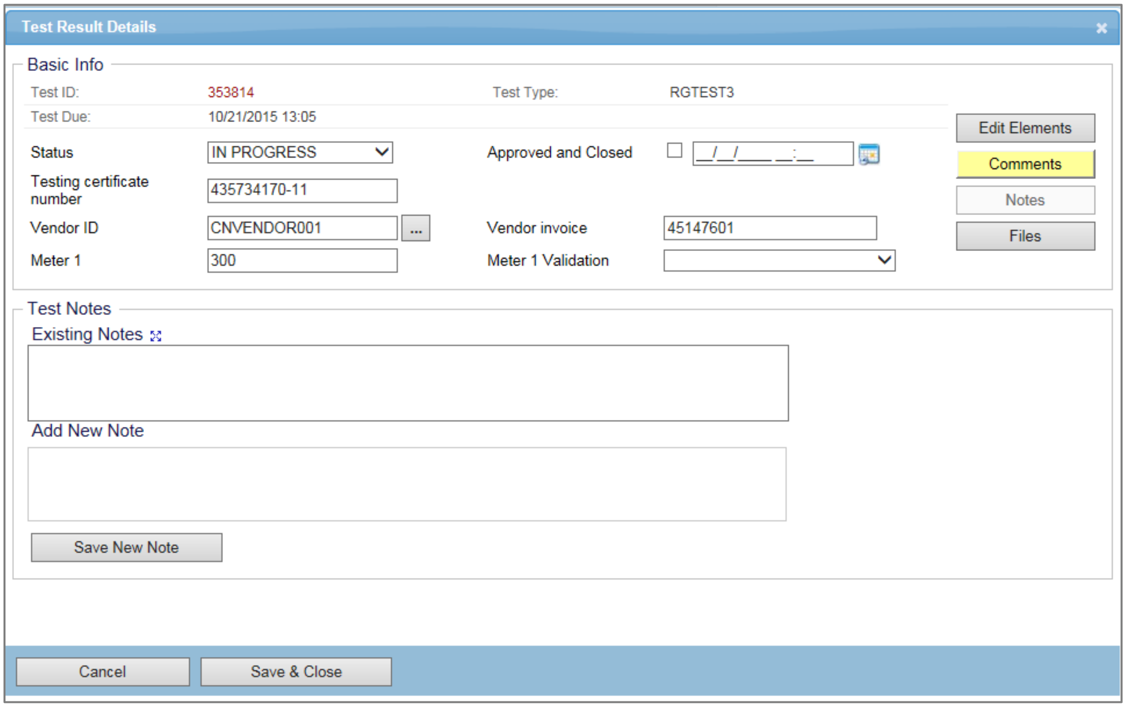
2. If you have test comments, type the comments in the Test Comments area and click one of the following buttons:

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:

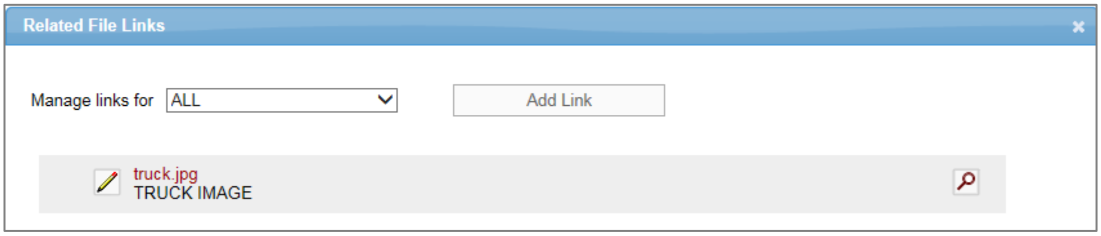
    i. Click **Save New Note** to save the note and return to the Work Order Test Result Test Elements Summary page where the Notes button will now be highlighted

    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:



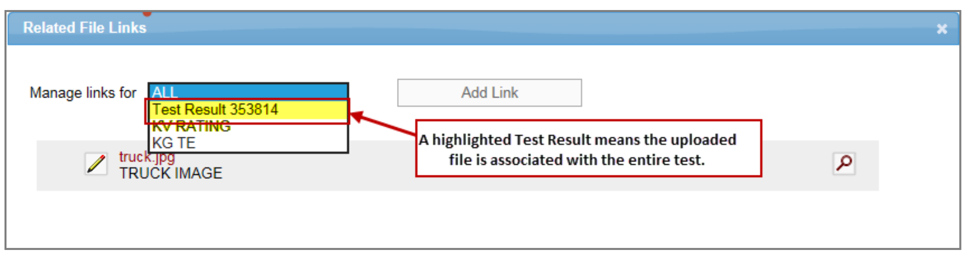
6. Click the **Manage links for** drop-down arrow to show the test and its elements and how the file is associated to the test.

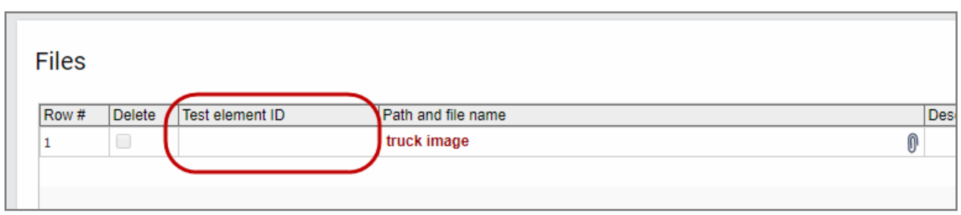
   When **Test Result** is highlighted, it means the uploaded file is associated with the entire test as depicted in the following screenshot. A test element is highlighted when it is associated with the file.

   i. Click the **Add Link** button to upload the file as outlined in the Adding an Associated File section.

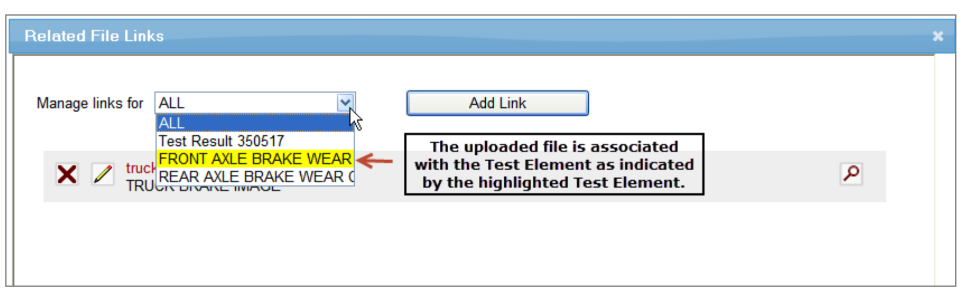
   ii. Click **ALL** to associate a file with the entire test. Then select a specific **Test Element** to associate a file with that particular element.

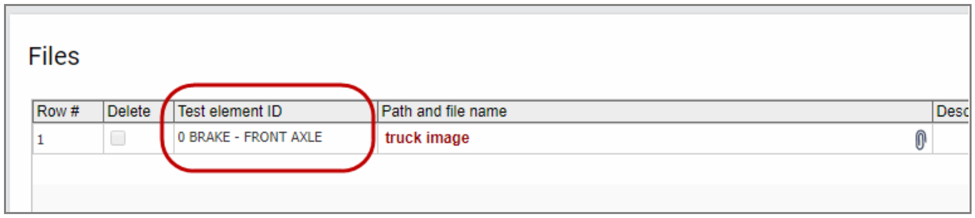
   - If no test element is listed here, the image applies to the entire test.



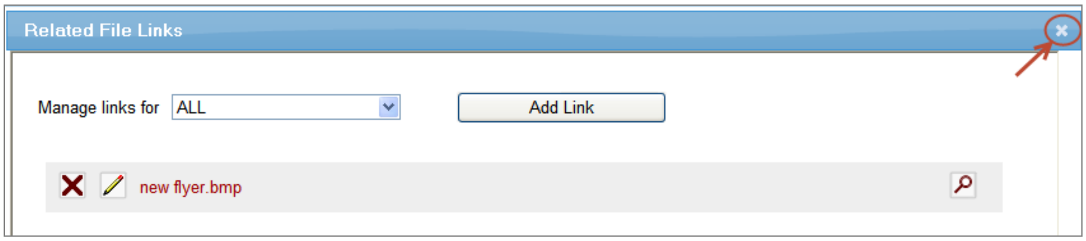


   - If a test element is listed in the Test element ID field, the file applies only to the specific element.

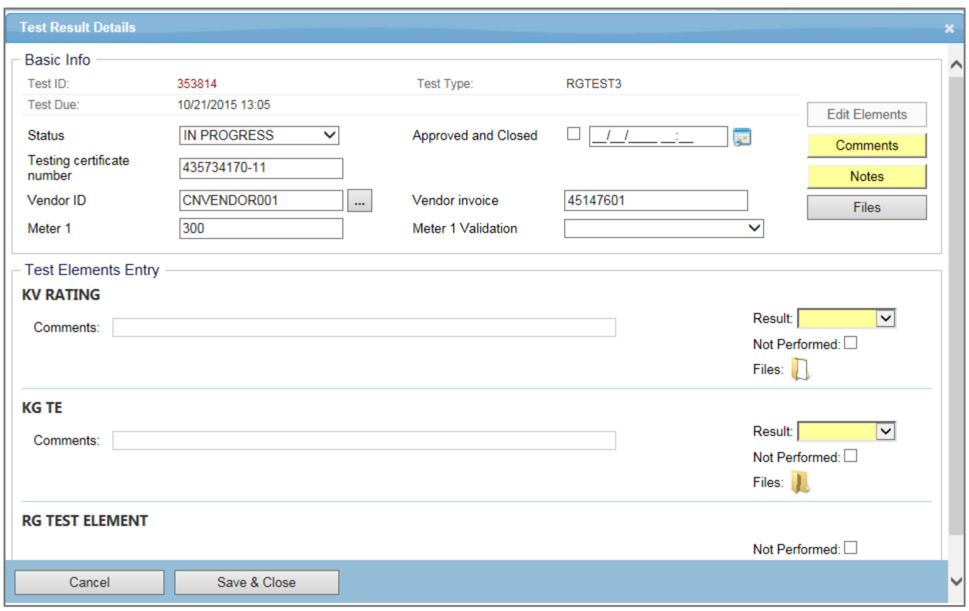




7. Click the **X** in the upper-right corner of the Related File Links dialog to return to the Test Elements Summary page.



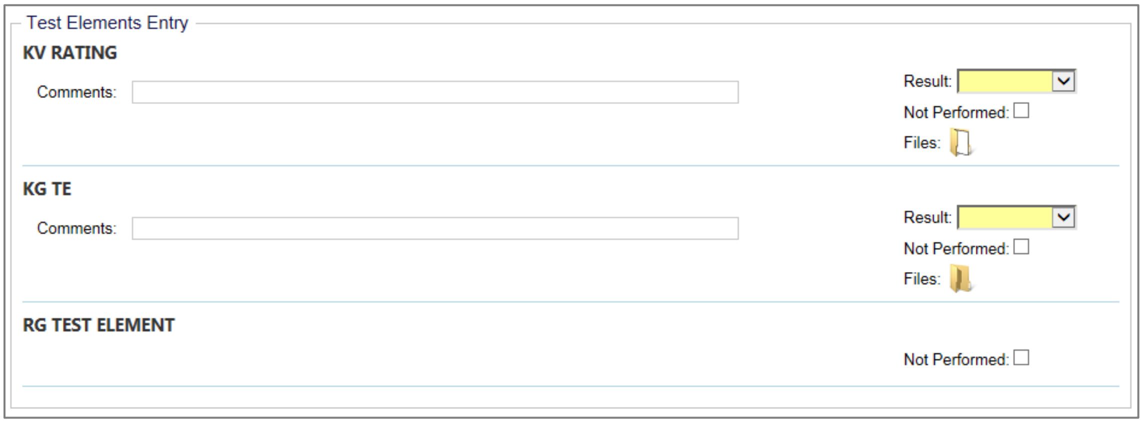
You are returned to the Test Elements Summary page.



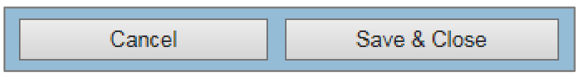
8. Remember to click **Save & Close** to save your entries.

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.



Function Buttons

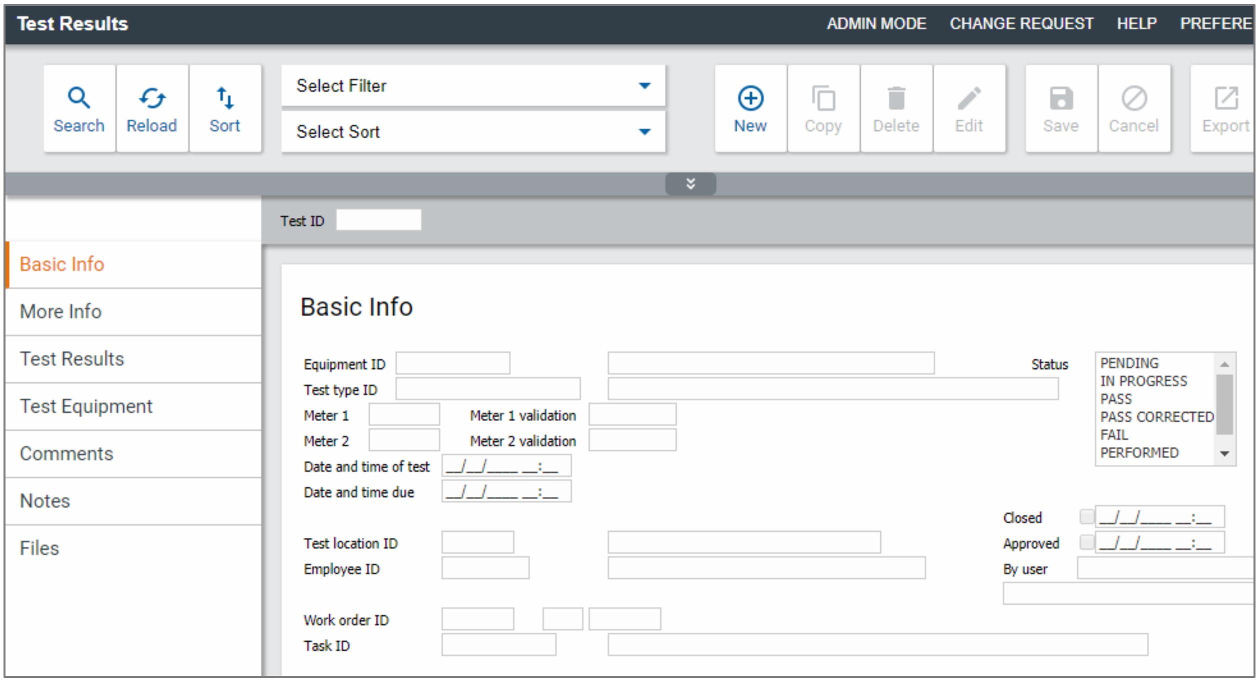


The remaining buttons allow you to perform the following functions:

- **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.



Test Results Information

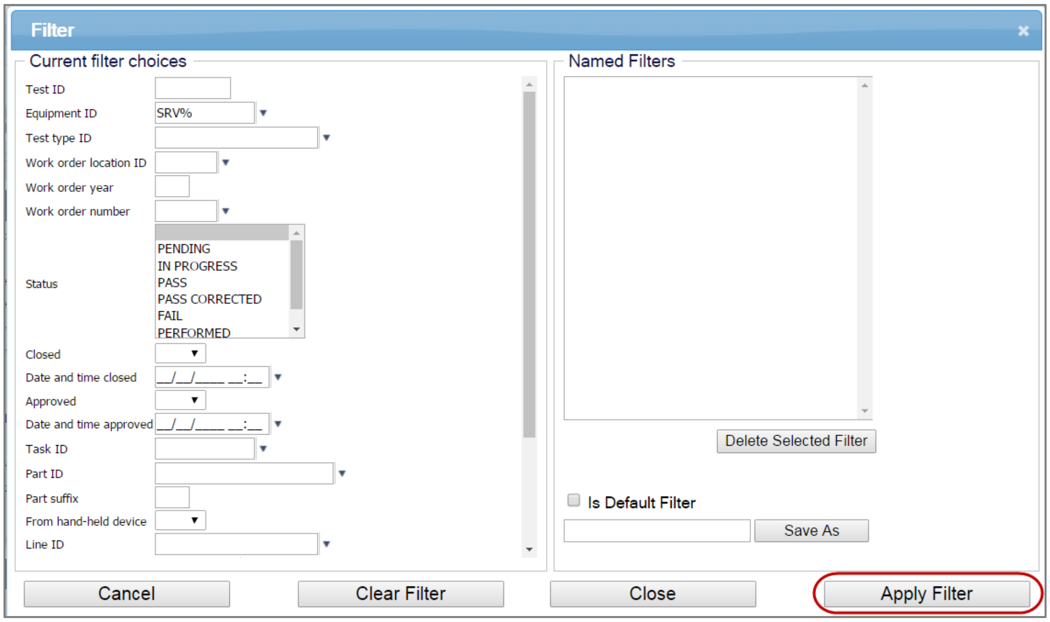
- Test results are required only if the test type has an equipment class setup that matches the equipment unit's equipment class, and that equipment class is required to have a test result. If the test type does not require a test result, test results do not need to be completed before the work order 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:

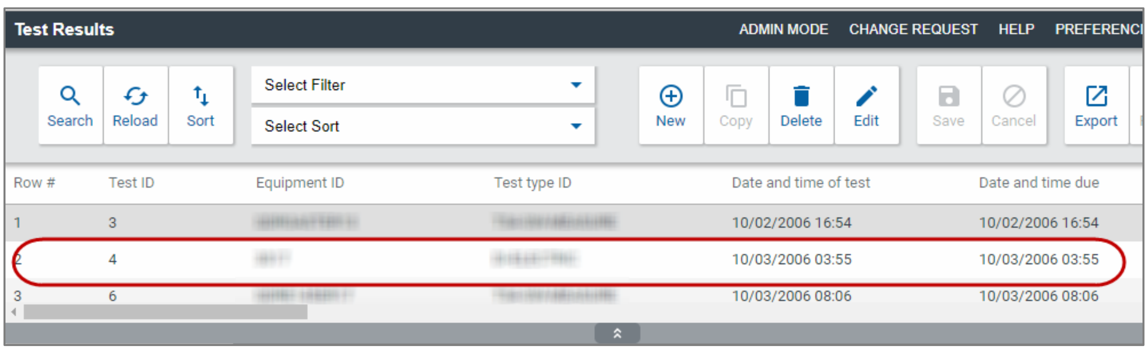
1. From the Enterprise Portal menu, open the Test Results screen.
2. At the top of the screen, click **New**.
3. Complete the Test Results screen with all necessary information.
4. If needed, click the **Help** button at the top of the screen for more information about filling out the page.
5. When you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



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



4. View or edit the information needed.

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