



## METAMATION

### Quick Start Guide

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## 3 Introduction to Metamotion

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Metamotion is a full document and information management system. Four methods of learning how to operate Metamotion are available:

- 1) Read this quick start guide and get going, using the on-line product help file
- 2) View the quick-feature video presentations provided with the installation files
- 3) Use the supplied Demonstration Database and demo database step-through user guide.
- 4) Arrange on-site training through Touchstone systems (see the end of this document)

The video presentations are provided with the installation files for Metamotion, and are also available on the Metamotion web site (<http://www.metamotion.co.uk>). These presentations provide a video guide to the features and use of Metamotion.

The demonstration database has the advantage in that it comes complete with real data, documents, users and storage areas allowing you to learn the major parts of the system as quickly as possible.

For more information on using the Demonstration database, please refer to the Metamotion installation guide (available from the download section of <http://www.metamotion.co.uk>) or supplied in the original installation ZIP file.

### 3.1 Metamotion Concepts

Metamotion stores documents and information within an internal database. Two types of information can be stored – documents and data. Documents are any type of unstructured information such as information held in graphic files, word documents, zip files, powerpoints etc. Data is structured information, such as fed in from ODBC data sources, access databases, and corporate applications. Data facilities are provided for allowing viewing of the information in a central location, but also for storing documents against data (such as invoices against company account records).

Documents and data are stored in virtual filing areas called nodes. Nodes are a structure of storage areas in a hierarchy to represent a working structure, company structure, project structure etc. Nodes are storage areas like directories. However, unlike a directory structure, the structure of nodes is more powerful. Whenever a node is defined, it can have multiple parents, children and siblings. When a node structure is changed, the data and documents within the node move with the change to the node structure.

### 3.2 Logging In

When you first install Metamotion on the server or client terminal, a virtual web site will be created (see Metamotion installation guide). The Metamotion application can normally be accessed through a standard Web browser (Internet Explorer, Firefox, Netscape etc) through the following URL:




//server\_name/Metamotion or  
//server\_name/Metamotion/login.aspx

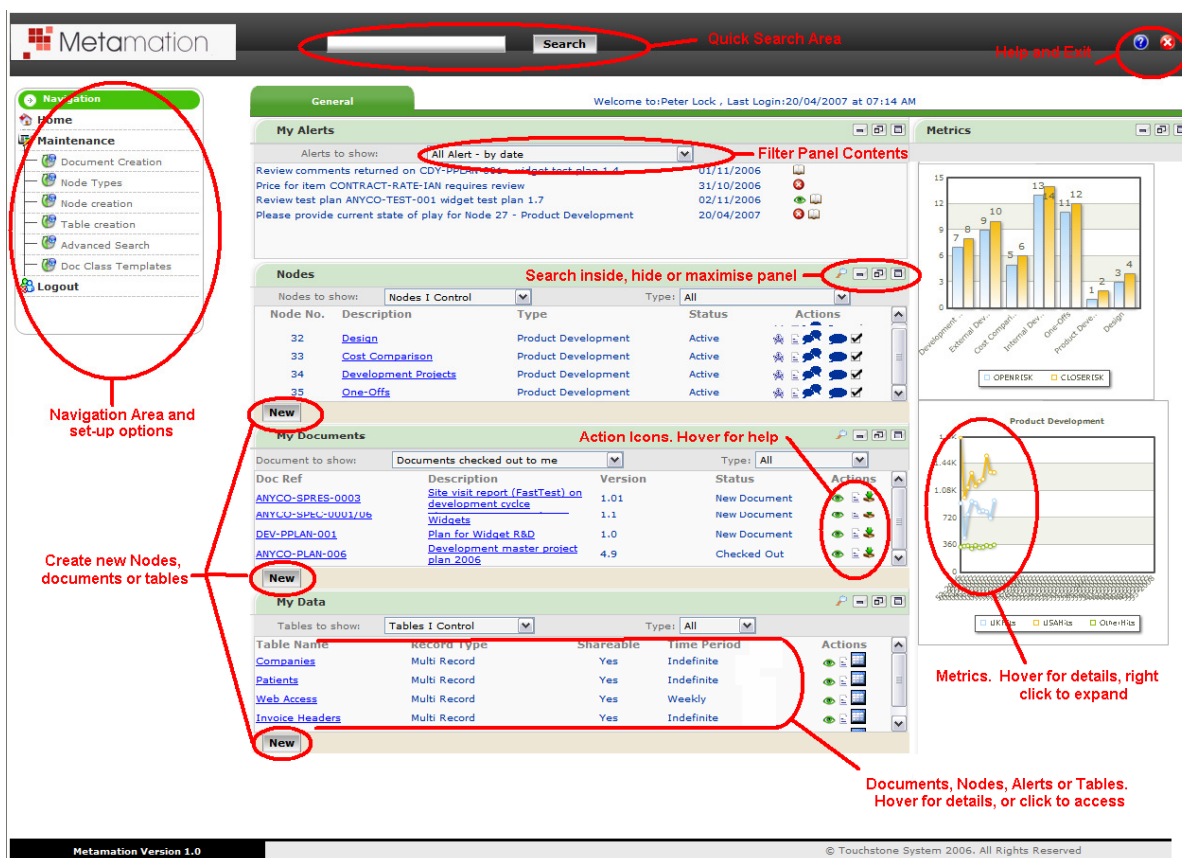
On the login screen, the initial master user will be as follows:

User code = SUPER  
Password = ELECTRIC

On login, you will be presented with the home page, with all menu options available.

### 3.3 Home Page Features

The home page can be configured to show different work panels and information, and will vary depending on the type of user accessing the system. On the home page (and all other processes in Metamotion, pressing the Help icon  will display the help for the area you are using. The major features of the screen are as follows:







The screenshot shows the Metamotion home page with several annotations:

- Navigation Area and set-up options:** A red circle highlights the left sidebar menu containing options like Home, Maintenance, Document Creation, Node Types, Node creation, Table creation, Advanced Search, Doc Class Templates, and Logout.
- Quick Search Area:** A red circle highlights the search bar at the top right of the page.
- Filter Panel Contents:** A red circle highlights the 'All Alert - by date' dropdown menu in the 'My Alerts' section.
- Search inside, hide or maximise panel:** A red circle highlights the search and panel control icons in the 'Nodes' section.
- Action Icons. Hover for help:** A red circle highlights the action icons in the 'My Documents' section.
- Create new Nodes, documents or tables:** A red circle highlights the 'New' button in the 'My Documents' section.
- Metrics:** A red circle highlights the 'Metrics' section on the right, which contains a bar chart and a line graph.
- Documents, Nodes, Alerts or Tables. Hover for details, or click to access:** A red circle highlights the 'New' button in the 'My Data' section.

The page also includes a footer with the text: Metamotion Version 1.0 © Touchstone System 2006. All Rights Reserved.

At the top of the screen is the application title bar which is always available for performing system wide quick searching, and control icons which appear on the far right of the title bar as follows:



-  - Sets the current on screen view as your default
-  - Connects to the Metamotion support issue logging or suggestion web site
-  - Displays the system on-line help
-  - Closes Metamotion

## 4 Option Set-up

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The menu on the left shows the maintenance tasks. From this menu, the following actions should initially be carried out:

### 4.1 SMTP set-up

This menu option is used to initially define the SMTP server for email notifications. This allows configuration of server names, ports, security credentials etc. The SMTP server is used to send external notifications. Initial configuration would have been performed as part of the Metamotion installation process, but fine tuning and changes can be applied here.

### 4.2 User Maintenance

This is used to create users of the system. Documents, storage nodes and data tables should not be created using the internal SUPER user. Create as many users as are required. It is worth changing the password of the SUPER user to the system administrator password.

Define the users giving each user a user code (the code used to login, name (for display and enquiry), password, and department/group. You can select groups either by entering a new group/department name, or selecting existing departments/groups from the drop down list. For external users, an optional email address can be specified so that Metamotion can communicate with them via email (to alert on new documents, versions, tasks etc).

### 4.3 Document Classes

This is used to create the classifications (types and groups) of documents which will be held within Metamotion. Typical document classes would be invoices, credit notes, specifications, presentations etc.

Give each document class a short code (such as "INV" for invoices), a description and set the default type of document (word, excel, PDF, etc) from the drop down list. Create as many classes as will be required.



## 4.4 Node Types

Node types are used to classify the purpose or use of the internal storage areas (nodes) you will be using within Metamotion. Typical node types may be Internal, External, Project, Administration etc.

## 5 Storage Set-up

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The next stage will be to login as one of your newly created users, and to set up storage areas for storing documents and information. All data and documents will be assigned to virtual storage areas called Nodes (although this term can be changed). Nodes act as stores, and can be joined together in a structure rather like a directory structure.

The following actions should be carried out:

### 5.1 Node Creation

The node creation can be selected from either the Navigation menu or the **New** button on the My Nodes panel on screen. On the displayed node creation screen the node can be defined. You can define as many storage areas as are required.

Nodes can be placed into a structure either using the parent/sibling/child relationships on the node maintenance, or using the graphical node structure maintenance option. If using the graphical node structure, first create the nodes, and then use the graphical structure to drag nodes on top of each other. Dropping one node on top of another makes the dropped node a child of the node it is placed onto.

### 5.2 Document Template Creation

Once storage nodes are defined, the Document Templates can be defined, which allows templates to be uploaded for new documents, and default document references numbers to be created. The **Document Templates** option will be shown in the navigation menu (for admin and author users). For each node, the templates can be defined, and any nodes down the structure from the defined node will use the defined template.

Templates act in a cascade effect. By setting a template at the top node, all child nodes inherit the previous node templates. However, templates for a specific node can be set to override the higher level settings, and this will then also cascade down to lower nodes.

For the top node you define, for each document type you will use (have already defined) you can specify a document reference and optionally upload a document template (word templates, template project plan





with your company name, template Cad drawing, etc). On the reference, specify groups of "?" for a reference number.

As an example, a reference of "I?????" will start generating documents numbered "I00001", followed by "I00002" etc. A reference of "MYCO-SPEC-???/07" will generate document references starting "MYCO-SPEC-001/07" followed by "MYCO-SPEC-002/07", etc. Each "?" character represents a padded number in the generated reference number.

Examples of document references set at a top level node may be as follows:

| General                 |            |                                 |                 |
|-------------------------|------------|---------------------------------|-----------------|
| Document Class Template |            |                                 |                 |
| For Nodes: All          |            |                                 |                 |
| Node                    | Class Code | Class Description               | Ref Template    |
| Touchstone Systems Ltd  | BRIEF      | Project/Customer Briefing       | TSL-PBRIEF-???? |
| Touchstone Systems Ltd  | CON        | Contract                        | TSL-CONT-????   |
| Touchstone Systems Ltd  | CUSTD      | Customer Data                   | TSL-CDATA-????  |
| Touchstone Systems Ltd  | CUSTDOC    | Customer Supplied Documentation | TSL-CDOC-????   |
| Touchstone Systems Ltd  | GUIDE      | User Guide or Manual            | TSL-GUIDE-????  |
| Touchstone Systems Ltd  | INST       | Application Installation Files  | TSL-APP-????    |
| Touchstone Systems Ltd  | INV        | Invoice                         | I?????          |
| Touchstone Systems Ltd  | MNOTES     | Meeting Notes                   | TSL-MEET-????   |
| Touchstone Systems Ltd  | PID        | Project Initialisation Document | TSL-PID-????    |
| Touchstone Systems Ltd  | PPLAN      | Project Plans                   | TSL-PPLAN-????  |
| Touchstone Systems Ltd  | REP        | Report                          | TSL-REP-????    |
| Touchstone Systems Ltd  | SPEC       | Specification                   | TSL-SPEC-????   |
| Touchstone Systems Ltd  | SRCE       | Source Code                     | TSL-SOURCE-???? |
| Touchstone Systems Ltd  | SVREP      | Site Visit Report               | TSL-SVREP-????  |

## 6 Working with Documents

Document is a generic term for any structured or unstructured information that is contained in a single entity. Examples of a document may be a Microsoft office document (Word, Excel, Project plan etc), an image (either drawn, from a CAD package or scanned in), a data file (such as a CSV, XML, HTML file), or a catalogue file (such as a ZIP, or RAR compressed catalogue).

Metamotion stores these items as 'documents' within an internal library. Think of documents as books within a virtual library. The room has virtual storage areas which may be anything from a file within a storage cabinet, a shelf, room or even a different building. The nodes defined are the virtual areas. All the books are there, but your security and permissions to the nodes controls which areas you can access, which in turn defines which books or documents you can see.

Each book (or document) clearly has a title, but it also has a lot of other information regarding its location, who last read it, who has checked it out (so the librarian knows who to chase when it becomes overdue) and also some other cross-relating index information, so that the librarian knows what books or documents relate to different subjects.



The Metamotion library has a back-catalogue as well. As new updated versions of documents become available, it removes the old copies off the shelves and replaces the document with the new version. But the old version is not lost. Instead, it is filed away for future reference just in case it is needed.

Because the books or documents are held in virtual locations (virtual rooms, shelves, cabinets, filing trays and so on), it is easy for the librarian to move these virtual stores around. When the virtual shelf or filing cabinet is moved, all the documents or books in that cabinet are automatically moved at the same time.

These virtual storage locations are referred to as Nodes within Metamotion, and the books are called Documents.

Metamotions jobs is to act as a virtual librarian, keeping the library up-to-date with the latest documents, keeping a note of who reads, checks in, or checks out documents, allowing new documents to be added to library with the necessary indexes for rapid retrieval, and to provide other services associated with the documents, such as controlling the review of new documents.

Documents can be submitted to the library either as general documents (which are stored in the specified storage location (node)), or documents can be associated to structured data. Documents against data allows documents such as maps, invoices received, purchase orders, plans etc to be indexed to know structure data records, such as project files, customers, suppliers, staff or any type of other information.

## 6.1 Document Creation

To create documents normally (manually) within Metamotion, two methods are provided which create documents in almost the same way:

On the navigation menu on the top left of the home or "nodal display" page, select the **Document Creation** menu option.

On the My Documents panel of the home or "nodal display" page, select the **New** document button within this section of the display.

The document properties window is then displayed allowing the creation of new documents. This window is also used for the amendment of existing documents.

During creation of a document, you should specify the document storage location (node), document type and class. You can then enter other document information such as description, and version.

Control buttons allow you to select the version (major, minor, etc), generate a document reference (document number that others can reference the document by), download a template to start work on the document, etc.



The Synopsis can be entered to describe in more detail the document, or if you leave this blank, it will be automatically populated for text based documents (not drawings, cad files etc) with the text of the document.

Once the document has been defined, you can save the document (which leaves the action as "New document" and it will be added to your document pending list), or Check in to upload the document (if it already exists).

## 6.2 Document Check in and check out

The document check-in transfers the current version of the document from your local computer into the Metamotion document repository and allows the next actions for the document to be specified. Document check-in can either be selected from the home or "nodal view" page against a listed document by selecting the check-in icon (📁), or can be selected from the main documents property window.

When documents are checked in, the check in window is displayed allowing the local copy of the document to be uploaded into the Document Repository.

Where documents are already checked in, you can use the check out button against a document (📁) to download the document to your local computer to edit the document and then check it back in to load the new version.

## 6.3 Document Review/Approval Process

When you check in a document, you have various options on the 'next action' to take place on the document. Options are:

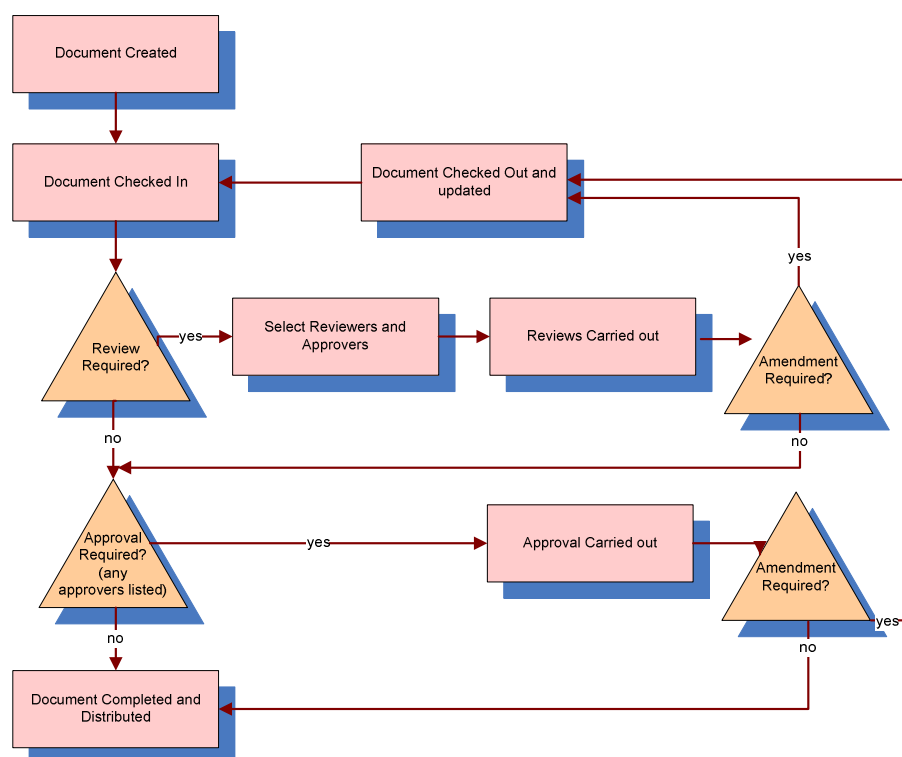
**Check In** – Document is checked in and no further action takes place

**Leave Checked Out** – Document is stored in Metamotion, but you still have the document under your control (for further edits)

**Review Document** – Document is sent to others for review and comments

**Approve Document** – Document is sent to others for approval before general distribution

When you mark a document for review or approval, you will be asked to select a list of reviewers and approvers from the list of defined users. Each user can be a reviewer, approver or both. The cycle for review and approval within Metamotion is as follows:



At all stages of the document life cycle, amendments are made by the document author, and reviews/approvals are carried out by the people selected. Metamotion alerts each person to their next action either through email notices or the Alerts panel. As a document author, you can check on the status of the review/approval through the document properties window (the Document Status will show the status for each approver), and will be alerted as the document progresses through the cycle.

## 6.4 Document Review/Approval process

When a reviewer is alerted that they need to review/approve a document, they are taken to the review screen. Here, they can look at the document (open the document for reading/review) and either mark up a copy of the document, or enter the review comments in a table of comments. If the document is accepted without comment, they can mark the document as reviewed, approved, they can defer the decision, or enter comments with reference to the page/reference/section, comment and type of comment. Once they reject or accept the document, the review is removed from their alerts list.

## 6.5 Document Review/Approval progress by Author

Once the review cycle is complete (either all reviews have been completed by all reviewers or the time to review has expired), then the document author will be alerted that approval/review has been



completed. By selecting the alert (From the alert panel), a list of the review/approval comments will be shown. As the document author, you have the ability to accept, reject or make comments on the review. Where you need to make amendments to the document, the review screen allows you to check out the document, make the amendments, and then check the document back in again. As you update the review comments, the original reviewers/approvers will be alerted on the outcome of their comments.

Where the approval is taking place, if everybody accepts the document (or the time expires), the document will be completed and distributed as required (see watch below).

## 6.6 Watch a Document/Node/Table

Metamotion provides the ability to place a watch on a document, node or table. All watches work in the same way, by allowing you to say that you want to be notified when the node, document or table changes. By selecting the Watch icon (👁️) against an item, you will have the ability to add your details onto a watch list. This allows you to be notified when a node (when node details change, or new documents are added to the node store), table or document changes. For documents, you can specify to be alerted as soon as a new version is available, or when a new approved version is available.

From the watch setting, you can specify if the notification is sent from an internal Metamotion notification (which will appear in the Alerts panel), or as an email (which will also include a copy of the new document version as an attachment). You can also optionally specify an external email address where new copies should be sent (multiple email addresses can be separated by a semicolon).

## 6.7 Finding a Document

To locate a document within Metamotion, a quick search is available at the top of all Metamotion screens. This search works in a similar way to the Google search engine – type in words to search or phrases within quotes (such as “new specification”). All documents (and data items, nodes and tables) you have access to will be searched matching your search criteria against the document reference or description. Pressing the **RETURN** key or the **SEARCH** button will perform the search and return the results to the screen.

In the listed results, the items which best match your search criteria will be shown at the top of the list, with the details of the item (reference, description, status, version, date, etc) shown against each item. If required, hovering over the item will show a synopsis of the item. Selecting the item will go to the selected item.



## 6.8 Advanced Searching

The advanced search option appears on the main Metamotion menu, provides a more sophisticated search than the basic search, and allows more search options. Within the advanced search, the search term can again be specified as per the basic search (type in words to search or phrases within quotes).

However with the advanced search, options are available to select creation date ranges, users who last created (checked in) documents, and you can also select what types of items to search (documents, data, include document synopsis, include full document text, etc).

The results from the advanced search is similar to the basic search, with the items which best match your search criteria shown at the top of the list, with the details of the item (reference, description, status, version, date, etc) shown against each item. Again, hovering over the item will show a synopsis of the item. Selecting the item will go to the selected item.

## 6.9 Document History

As new versions of documents are checked in, so previous versions of documents are retained by Metamotion for future reference. Within the document properties window, if there are older versions of a document, the **previous versions** can be listed. Select a version with the mouse to open, view or save the previous version.

# 7 Working with Data

Metamotion allows the storage of data in defined data tables. Tables are defined to allow the storage and control of data items, the viewing of charts and reports associated with the data, and also allows the storage of documents against data items within tables.

As an example, a table can be defined to store invoice details, charts can be produced showing invoices over a range of criteria (such as by customer, sales territory, or time period), and copies of the invoices can be stored with the invoice data.

Metamotion allows the entry and editing either through Metamotion data entry screens, or information can be pulled from a variety of data sources including external databases (such as Oracle, SQL, or any other ODBC database), from excel spreadsheets, project plans, etc.



## 7.1 Creating a Data Table

Before structured data can be held within Metamotion, data tables need to be defined. New tables can be created from the home page, under the **"My Date"** panel, using the **New** button to create a new data table.

Data tables can be defined with a range of Time Periods. Whilst the majority of data tables will be created as "Indefinite" (data is valid from creation to when it is deleted), tables can be created with Time Periods of Monthly, Quarterly and Yearly. Creating Tables with these time periods allows data to be held which is specific to a time period. Examples may be department budgets (which may be set per year), or sales targets (which are set per year, quarter or month). A table with a Time Period allows the same data items with the same reference or key, to be held for different time periods and contain different information.

When creating a table, you should provide a short description, a synopsis of the table, an owner and a storage area (node).

Where data is to be extracted from another data source (ODBC, Excel, Project plan, etc), the data source type and connection parameters should be set. This will include the database/file location, the refresh type (just add, add and change, or update and delete), refresh time (how often to refresh), and data source (ODBC select statement, Excel range name, etc).

Once a table has been defined, the table content (columns) can then be defined using the **Define Content** control on the table.

## 7.2 Defining Content

The defining content tab from a new data table allows you to add fields to a data table, or amend those that already exist. The screen is divided into two sections, with a list of existing columns on the left and a panel for adding new columns on the right.

When you add new columns, the columns you add are mapped to existing pre-defined available columns. Each column has a name, label for on-screen display, and the storage column from the pre-defined available list. Most of the fields are free text, and every type of field has a number of occurrences. So for instance, the field to hold fax numbers (FAX) has two occurrences, so available storage fields are FAX1 and FAX2.

The following gives a guide to the available Metamotion defined fields, how many occurrences there are per field type, and the maximum format (length) available:



| Column Name      | Number of occurrences  | Maximum format of each occurrence |
|------------------|------------------------|-----------------------------------|
| TABLENO          | 1 – Primary key part 1 | 8N                                |
| TIMEPERIOD       | 1 – Primary key part 2 | 4A                                |
| ID               | 1 – Primary Key part 3 | 20A                               |
| NAME             | 1                      | 50A                               |
| ADDRESS          | 5                      | 40A                               |
| COUNTRY          | 3                      | 40A                               |
| URL              | 4                      | 100A                              |
| EMAIL            | 4                      | 100A                              |
| FAX              | 2                      | 20A                               |
| PHONE            | 4                      | 20A                               |
| MOBILE           | 2                      | 20A                               |
| VERSION          | 5                      | 10A                               |
| DATE             | 10                     | Date/Time                         |
| TIME             | 5                      | Time (only) in format HH:MM:SS    |
| STATUS           | 5                      | 20A                               |
| VALUE            | 20                     | 10N                               |
| FLAGS            | 10                     | 1A                                |
| NOTES            | 5                      | Memo                              |
| USER_ID          | 10                     | 10A                               |
| REF              | 5                      | 20A                               |
| LINE_NO          | 1                      | 5N                                |
| ASSIGNED_USER_ID | 1                      | 10A                               |
| VISIT_FREQ_DAYS  | 1                      | 3N                                |

Columns can be defined with a maximum length, can be defined as mandatory, and can have an entry format applied either from the drop-down list of common formats, or a specific format can be applied using the specific format painted from characters with special meanings are as follows:

- A** = Mandatory position for an alphabetic character
- N** = Mandatory position for a numeric character
- 0** = Mandatory pad for a numeric number
- #** = Optional position for a numeric number
- , +, \_** etc = padding characters
- "xx"** = pad characters in the text

The following gives a guide to the most common formats that you can specify in the other format area, and how entries and validation will be performed:






| Other format Specified | Example Entry by User | Rejected? If so, why                                      | Resulting entry prompt displayed after entry |
|------------------------|-----------------------|---|--|
| AANNNNN                | P12345                | Rejected – only one alpha                                 |  |
| AANNNNN                | AA1234                | Rejected – only 4 numerics                                |  |
| AANNNNN                | RE09123               |   | RE09123                                      |
| AA####N                | R98                   | Rejected – only 1 alpha                                   |  |
| AA####N                | TE78                  |   | TE00078                                      |
| AA-NNNNN               | AA1234                | Rejected – only 4 numerics                                |  |
| AA-NNNNN               | PE-12345              |   | PE-12345                                     |
| AA-NNNNN               | PO98987               |   | PO-98987                                     |
| #.00                   | FISH                  | Rejected – not numeric                                    |  |
| #.00                   | .98                   |   | 0.98   |
| #.00                   | 125                   |   | 125.00                                       |
| #.00                   | 134.567               |   | 134.57                                       |
| #,###.00               | 12345.567             |   | 12,345.57                                    |
| "DP"NNNNN              | 1234                  | Rejected – only 4 numerics                                |  |
| "DP"NNNNN              | 12345                 |   | DP12345                                      |
| "DP"####N              | 12                    |   | DP00012                                      |
| "DP"#####N-"XE"        | DP1234                |   | DP01234-XE                                   |
| "DP"#####N-"XE"        | DE12345               | Rejected – DE does not match DP                           |  |
| "DP"#####N-"XE"        | DPA1234               | Rejected – A (which takes up numeric spot) is not numeric |  |
| "DP"#####N-"XE"        | 123456                | Rejected – too many numerics                              |  |
| AAA-NNNN-AA            | ABC1234ER             |   | ABC-1234-ER                                  |
| AAA-NNNN-AA            | ABC-9897-TT           |   | ABC-9698-TT                                  |

Columns can be defined as "Meta" items, which are metrics which can be used for passing information between other tables/rows, graphing, control and searching. Flow up/down allows the information to be passed to other tables/rows (such as invoice line items flowing up to an invoice header table to populate an invoice header total, or invoices values flowing into a budgets table).



Metrics can be graphed by creating a metric against a value (a VALUE column), indicating the type of default graph to produce, and the x-axis (which defaults to the node number).

Columns can also be calculated from other data. In the calculation field, the equation can be entered in Excel format (the fields names are referenced by the real Metamotion field name (such as VALUE1, VALUE2, etc)), or the calculation wizard can be used through the calculation icon (). An example calculation (to store a 17.5% tax from a net amount held in VALUE1) would be "VALUE1/100\*17.5"


Finally, where the table has been set to retrieve data from an external data source, columns can be linked to columns in the defined data source from the source column drop down list. Columns defined as either calculated or imported from a data source cannot be entered or amended through Metamotion data screens, but instead will be automatically be populated.

Once you have defined a column, press the **Add** button at the bottom of the column definitional panel to add the column to the definition on the left, and press **Save Table** to save the column definitions into Metamotion.

### 7.3 Defining Table Layout

By default, when entering data into defined tables into Metamotion, the layout of the entry form for the table is intelligently calculated by Metamotion for the best layout. However, you may control the Layout of the fields on screen using the **Define Layout** button from the column definition screen for a table.

Table layout is performed by defining data display panels or sections, assigning the entry fields into the panels, and then setting the preferred display order. Metamotion will then layout the entry screen using these panels and the order you specify, whilst balancing the entry field into display columns.

When you select the **Define Layout** option, a pop-up window will appear showing all the table columns you have defined. You can now assign Panel groups to each prompt from the drop down list, or use the new panel icon () to create a new data entry panel (specifying the panel/Group name and the panel order (panels number 1 will be displayed on screen first, with panel 9 displayed last). When all prompts have been assigned to display panels, the sort order of the individual prompts can then be entered in the prompt number order, where within the panel, prompt number 1 will be displayed first with prompt number 999 displayed last.

To see the effects of your changes in a mock up of the screen display, use the **Display Layout** button to produce a pop-up of the data entry form with your current settings. When you have the display set in the preferred order, press **Save** to return to the column maintenance process.



## 7.4 Data Viewing

Data entry and viewing of existing data in tables is performed through selecting the table either from the favourites list (below the navigation menu if you have added any data tables as a favourite), or by selecting the table from the "My Data" panel on the Metamotion home page.

When the table is first selected, a summary screen will be shown, listing at the top of the screen filter criteria and in the lower half of the screen, any data records populated in the data table. Where there are a number of data records, you can page through the data records using the page selector, forwards, backwards, first page and last page controllers (<< < 43 44 45 46 47 48 49 50 51 52 > >> ).

The filter criteria at the top of the screen shows any prompts where the "Data Filter" is ticked on the columns defined. You can enter any filter criteria you like in the entry prompts (multiple prompts entered represent a logical AND), and then use the controls between the filter options and the data rows as follows:

**Filter** – Filters the records shown by the criteria supplied above  
**Show All** – Removes the filter (but keeps the criteria), showing all data records  
**Clear** – Clears the filter prompts without resetting the data shown  
**New** – Creates a new record (see below)  
**Delete** – Deletes a record (tick the records to be deleted)

The columns listed in the record details are those columns selected to be "shown in summary" when the columns were defined. If there are more columns than can fit on screen, you can resize columns or scroll by moving the mouse pointer left or right over the display grid.

## 7.5 Data Entry

New data records can be created in Metamotion using a variety of methods including data feeds from external sources (defined during the data table definition detailed above), through the Metamotion API interface, or manually entered.

Data entry within Metamotion can be carried out using two formats of data entry; the form view which allows one record at a time to be created or amended, or the sheet view which allows entry in a spreadsheet view.

From within the data viewing screen, selecting a record displayed with the mouse will by default present the form view for amending the selected record. Pressing the **NEW** button in the data display screen will present the same data form view, but with a new blank record allowing data entry. Alternatively, pressing the **View Data Grid Data Entry** button at the top of the screen will present the data entry grid.



Both formats of data entry work in the same way, the form view layed out in a single record view, and the grid as per a spreadsheet (with options to add **New** records to the bottom of the grid as required. All prompts on screen will allow editing or entry where the prompt is not defined either as a calculated entry, or is derived from an external data source. All prompts are validated as the data is entered, and if required, reformatted as per the defined format.

For any prompts which are validated from a validation list or another table, the prompt will allow selection from the drop-down list of available options. Entries which are marked as FIELD columns, will allow the choice to be ticked, or alternatively you may manually enter "Y" or "N" (or "yes" or "No"). Date entry fields will allow manual entry or alternatively, a pop-up calendar will appear allowing selection.

When all entries are complete, pressing the **SAVE** button will save the single record (for the form entry view) or all amended and entered records in the sheet view.

## 8 Documents Against Data

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Documents as already described can be free standing, stored in storage nodes assigned to departments, project, work areas or people. In addition, documents can be held against data records, such as purchase orders, staff, people, assets, invoices etc.

### 8.1 Data Table Document Classes

As with the document defined document classes, document types are defined against data tables. Within the Data Table Maintenance described above, an option is available in the table properties to defined Document Classes. This option is used to create the classifications (types and groups) of documents which will be held within Metamotion for each data table. Different tables can have different types classes, but you will need at least one document class to hold documents against data records. Typical document classes would be invoices, credit notes, specifications, presentations etc.

Give each document class a short code (such as "INV" for invoices), a description and set the default type of document (word, excel, PDF, etc) from the drop down list. Create as many classes as will be required.

### 8.2 Storing Documents Against Data Records

Document storage against defined data records is performed using the Metamotion data maintenance facilities already described. Depending on which view you are using, defines how documents are added or viewed.



### 8.2.1 Viewing through the data summary view

By selecting a table from the Metamotion home page, the data summary screen will be displayed. Where documents are already held against a data record, an extra column is shown on the data records displayed, as follows:

| Name           | Address        | Phone    | Linked Doc |
|----------------|----------------|----------|------------|
| Life Pension   | lkjkl;lk j     | lkjkl    | Add        |
| Life Pension   | lkjklj         | lkjklj   | Add        |
| Life Pension   | kdsjfhkgh      | lkjklj   | Add        |
| Supplier (EDF) | nbmbnmbnmbnmbn | lkjkl    | Add        |
| Life Pension   | ldskfjkl       | lkjkl    | Add        |
| Life Pension   | sdklfjklj      | lkjklj   | Add        |
| Life Pension   | lkjkl          | lkjkljkl | Add        |

Where there is a single document, clicking on the document will show the document, whilst clicking on the multiple documents item will show the document list as described in the form view below. To add a new document, select the **Add** option which will take you into the new document properties window as already described.

### 8.2.2 Adding/Viewing through Sheet View

Where you are adding new records or amending existing data records using the data sheet view for data entry, the display and method of entering documents against data records is the same as the summary view described above.

### 8.2.3 Adding/Viewing through Form View

Where a record is selected from the data summary view or the **New** button is selected to add a new record, the form based single record data entry screen is shown. Where document classes are defined against the storage table, a grid is shown at the base of the screen to allow viewing of or adding of linked documents as follows:

| Document Description                           | Version | Submit Date             |
|--|---------|-------------------------|
| 56 Standard Life Pension Startup with Clinisys | V1.0    | 27-Jun-2008 05:12:05 PM |
| 57 Standard Life Pension statement April 2004  | V1.0    | 27-Jun-2008 05:13:32 PM |
| 58 Standard Life Pension statement April 2005  | V1.0    | 27-Jun-2008 05:14:20 PM |
| 61 Standard Life Pension statement Sept 2006   | V1.0    | 27-Jun-2008 05:15:58 PM |
| 59 Standard Life Pension statement April 2006  | V1.0    | 27-Jun-2008 05:14:53 PM |



The different documents for each defined class can be viewed by selecting the relevant tab, select the document to see a thumbnail (depending on document type) and document synopsis, or select the properties (🔗) or read (📖) to change or view the document.

## 9 Graphing Data

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When tables are created and the columns (content) defined, any columns defined as Meta data can be included in the Metamotion home page for graphing. Generally, only numeric columns (VALUE1-20) should be used for graphing, but in fact, any columns can be used for generating graphs. If a column is selected as a metric which is a flag, Metamotion will count the occurrences where the flag is set (ticked) or for alphanumeric columns, where records have data (an effective count on the contents).

On the home page, or a specific node display, graphs will be displayed for each metric group defined, where there is data for that location or nodes that can be seen from that location (child nodes). The type of graphs that will be displayed will be set as the columns and Meta data is defined, but can be a pie chart, bar chart, area graph, data table (grid), line chart or budget chart. The x-axis by default is the node (project or work area) but can be changed to be graphed by any other data (such as customer, dates, product, etc).

When metrics are set to be graphed by Time period, Metamotion will adjust the time period automatically to display the format which best fits on the screen – from day, week, month, quarter or year.

As with all other panels on screen, the metrics panel can be hidden to make more general space on screen, restored, or maximised to show all the available graphs in a larger format for more clarity. Individual graphs can be controlled by right-hand clicking on the graph to hide that selected chart, maximise the chart (to fill the display), show the data used (data table contents) or show the definition (table content definition). When a chart is maximised, you can change the chart type, time period, print the chart, and make other changes to the display.

## 10 Controlling the Home Page


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On the main Metamotion display (from the **Home** menu item), each of the display panels can be controlled in various ways:

### 10.1 Resizing Panels

Depending on the settings of your web browser, as panels are hidden other panels will resize depending on the information to be displayed to fill the display screen. Each panel on the home page, including the



panel showing metric graphs, can be hidden using the minimise icon in the panel header bar () leaving just the panel header.

Alternatively, display panels can be maximised to fill the display using the maximise control () on the panel header.

## 10.2 Jumping Into Projects


The standard Metamotion 'home' page shows your information; documents you are working on, nodes you own, your alerts and your tables. Within the **My Nodes** panel, you can jump into a specific node by clicking on the node name to provide a nodal view.


This looks the same as the home view (with the exception that the node title, synopsis and if applicable, graphic are shown at the top of the screen), but now the alerts are specific to the node selected, the document are the documents within the nodal store, and the tables are those specific or available to the node selected.

You can continue to drill down further by selecting child nodes from the node list in the nodal panel.



## 10.3 Grants

When you create nodes for storing documents, access to the node by other people will depend on whether you link it to a parent node, or grant specific access. Where you attach the new node to a parent node, any people who can access the parent will, by default, be able to access to the new child node (unless you specifically un-grant access). Alternatively, you can manually set access to the node.

Access to nodes, tables and documents are controlled using the grant access icon () next to each item. Selecting this will take you into the grant access screen, allowing you to specify a list of either users or departments/groups which can or cannot have access. Against each user or department selected, you can specify what level of access they should have for the item, and if this access is for that node only, or should also include associated child nodes.

When the grant is complete, the grant icon against the item is shown in red () to indicate that specific grant access has been applied to the item.

## 10.4 Favourite Items

Each node (and document and table) can be marked as a favourite using the favourite icon () shown next to each item. Once the node (project, work area, store, etc) is a favourite, it will appear under the navigation menu on the left of the display. Favourites can be removed by selecting the favourite unselect icon ()



To jump into a specific node (project), select the favourite from the favourites menu. Alternatively, the favourite node can be opened to show the number of documents, tables, or actions within the project. Select one of these items to jump directly into the documents, data or actions for the selected project.

## 10.5 Changing Filters

On all the panels shown on the screens, display filters are available at the top of each display panel to change the details displayed. The filters will vary by the panel, but typical filters will be as follows:

**Items I am Working On** – shows documents checked out to you, your actions, your projects, etc


**Items I Own** – shows documents, tables or nodes that you created or last checked in

**Items Needing Review/Approval** – shows documents that you need to review or approve (these will also be listed as alerts)


**Granted Items** – Specific items which you have been granted access to


**Node (project) items** – The node structure will also be shown, allowing you to select the node or project you are interested in


Other filter items will allow you to further filter by such things as the type (document type, alert type, node type etc), class or category of item, or number of levels to be displayed.

All filter criteria of all displays can be saved as the preferred view using the **My View** icon () in the top right corner of all Metamotion screens.

## 10.6 Getting Project Status

Where nodes are defined as projects, managers of projects can request a project status by selecting the status request icon () against any nodes. This sends an alert to the manager of the node/project to complete a project status report. They in turn, can request sub-project or task updates from their own teams or projects.


If you receive a project status update request (within the Metamotion alerts panel), pressing the update status button () in the alert or against the node will allow the status update (the current status of the project) to be entered as text. Where applicable, the status of child projects will also be shown for your information. In the Status update screen, you can change the date selector at the top of the screen to change how far back to look for status dates (the system will look back to the date specified for each node, but will only include the most recent status update for each node).

When you are asked update the status of your project in the alerts window, pressing the update request button against the alert () will






send an update request for all child nodes. When all the sub-tasks are updated, you will be alerted that statuses have been returned, and you can update your own status for your projects.


To compile a project status report, for the node level the report needs to be compiled at, select the status update icon against the node (  ), update the project status, change the reference back date to include the updates for all child nodes, and then press the **Export to Word** button to generate a word document with the formatting for each child completed for you.

## 10.7 Locking the Home Page

When you login to Metamotion, the initial display shown is the standard home page. However, any screen or view, including a filtered home page or a home page where panels have been hidden, can be saved as your locked home page. When a page is displayed which you would like to save as your view, simply select the **My View** icon (  ) from the top right of any Metamotion page.


When you next login to Metamotion, your selected view will now be the initial display shown. The standard home page can still be displayed by selecting the **Home** menu option of the navigation menu on the left of the display, and your **view** page display at any time by selecting the **My View** menu option of the navigation menu.

## 10.8 Issues and Suggestions

If at any stage, you see any problems with Metamotion, the system help files, or want to make a suggestion for improvement, a support icon (  ) is available on the top right of all Metamotion screens. This will take you to an on-line support screen, allowing you to identify the issue, yourself and the comments. The screen with the issue will automatically be populated.

Touchstone Systems will provide feedback including an indication of a solution to your query, a fix, or an indication if your enhancement suggestion will be included in a new release of Metamotion.

## 10.9 Getting More Help

This guide is intended as a quick guide to the major features of Metamotion. A full on-line context sensitive help is provided through the help icon (  ) in the top left corner of all Metamotion screens. This help is also available as a PDF user guide, and in printed format upon request.



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## 11 Day to Day use

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The above guide is intended to provide you with the very basics of the Metamotion system. However, it is strongly suggested that you take time to read the included Metamotion User Manual, which is available in both a PDF format and also as on-line help within the product.

For more information or general help with Metamotion, various support options are available.

Email support is provided by detailing your questions or problem to [support@touchstone-systems.co.uk](mailto:support@touchstone-systems.co.uk). This email address should be used whenever further details are required by our support staff (such as screen shots, details of configurations, etc).

Web support is provided by accessing the on-line support site at [www.touchstone-systems.co.uk/support.htm](http://www.touchstone-systems.co.uk/support.htm). This site provides the ability to log new issues or change requests, view details of support issues, software changes or releases, or to provide updates to existing issues.