



METAMATION

Demonstration Database Step Through

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3 Introduction to use

This guide provides a step through the major functions of the Metamation application using a standard demonstration database. This database is available either in SQL Server or Oracle format.

By default, the SQL Server version of the demonstration database is provided with the installation of Metamation. The Oracle version can be obtained by emailing the Touchstone Systems support team at support@touchstone-systems.co.uk, or viewing the downloads section of the Metamation web site at www.metamation.co.uk.

Details on restoring the demonstration database can be found in section 4 of this guide, and also in the Metamation installation and deployment guide.

4 Restoring Demonstration Database

When Metamation is first installed, the database created will be effectively blank, with only a single user created for initial access. This user will have the following credentials:


User Name = SUPER
Password = ELECTRIC

When logging in for the first time, it is strongly suggested that the SUPER user be amended using the user maintenance routine and the password changed to your standard administration password.

Where you want to take advantage of the demo database (a database of pre-defined document types, storage nodes, documents and users), you will need to manually restore the database as detailed below. Once you have finished with the demo database, the original blank database can be restored, or you can just add to the demo database with your real data.

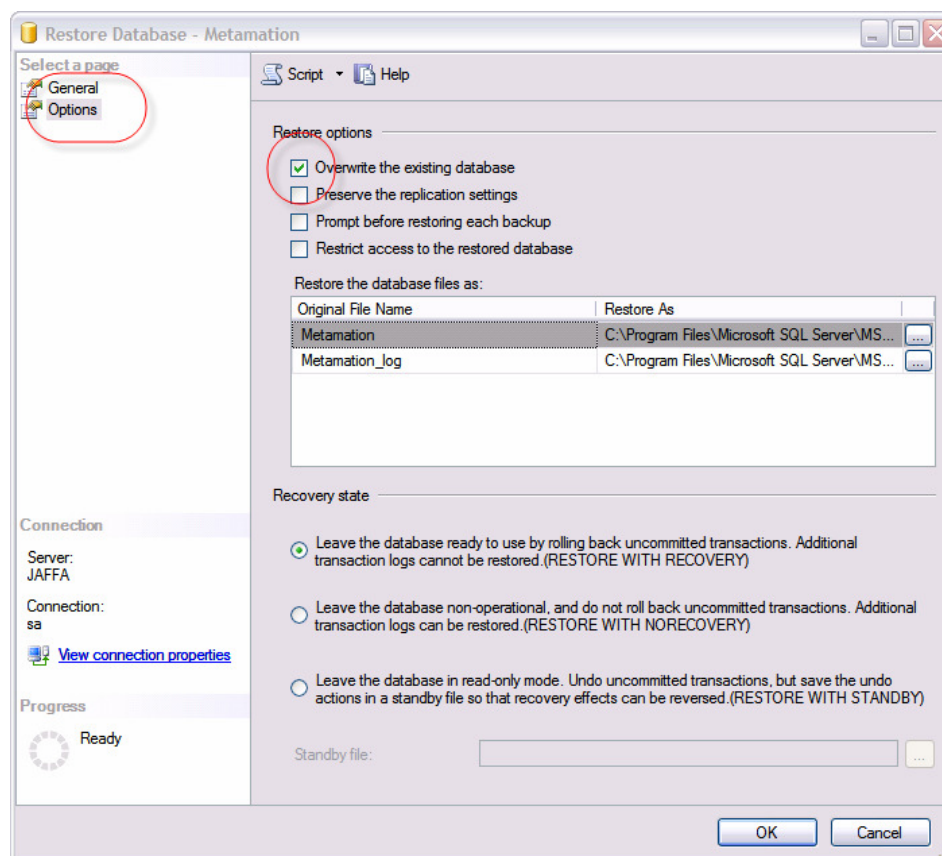
To limit the size of the supplied files, the demo database is only supplied in SQL Server format. If you would like the demo database in Oracle, please contact support@metamation.co.uk, and a database will be sent to you.

To restore the Database, use the SQL Server Management Studio to restore the database. The following instructions are for SQL Server 2005, but are very similar for previous versions of SQL Server:

- 1) Activate the SQL Server management console and login to the SQL Server database.
- 2) Using the explorer on the left panel, expand databases, and locate the database Metamation
- 3) Right hand click on the Metamation database, select the menu option **Tasks**, then the **Restore** menu option, and finally **Databases**.
- 4) From the pop-up Restore database window, select under Source to Restore, the From Device option, and then against the From device, then browse button ()



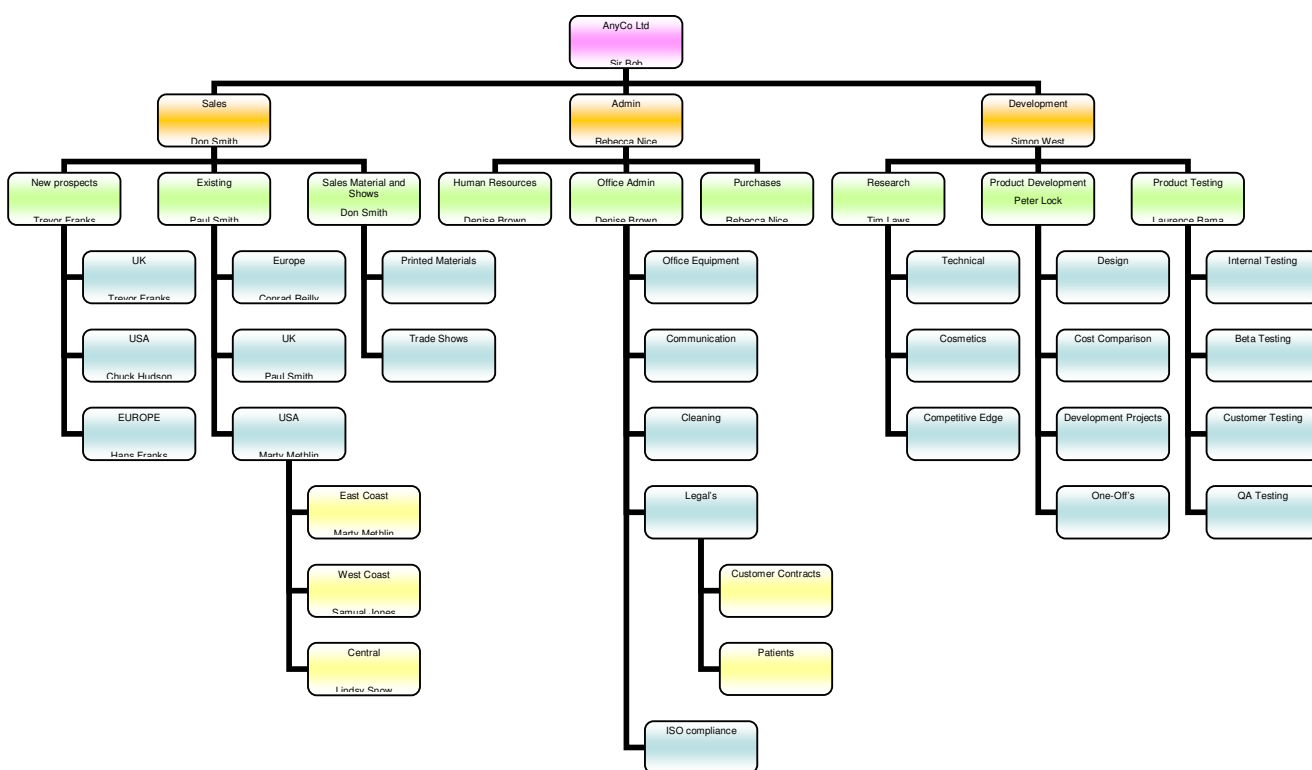
- 5) In the next pop-up Specify Backup window, Add a file then browse and select to the uncompressed Metamation installation directory. The MetaDemo.BAK file should be selected for restore.
- 6) To restore the demo database, select the Restore button next to the selected database on the main restore screen.
- 7) Select options on the left hand panel, and then select the Tick box "Overwrite the database". Finally, select the OK to restore the database:



5 Demo database step-through

The demonstration database is provided with a predefined company structure, users, document types, and storage structure. This pre-defined database is provided not a representation of your own company structure, but simply as a way of demonstrating Metamations main facilities, and allowing you to use the major features with the minimum effort.

Within the demonstration database provided, the following company and staff structure is used:



Metamation Concepts

Metamation stores documents and information within an internal database. Two types of information can be stored – documents are 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.

Logging In

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

```
//server_name/Metamation or
//server_name/Metamation/login.aspx
```

On the login screen, the initial 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.


All the users defined in the above structure chart log in using their first name as their user code, and all users have the password of "ELECTRIC".

The users we will access in the step through will be:

User Name	Login user code	Password	Users function
Sir Bob Douglass	Sirbob	Electric	Company MD (and system administrator)
Peter Lock	Peter	Electric	Head of development
Don Smith	Don	Electric	Sales Manager
Denise Brown	Denise	Electric	Office administrator

System Set-up (With Sir Bob)

Login as "**sirbob**" to administrate the system (password is electric). After login, the home page is displayed, and you will see that in the top left, SirBob as system administrator has access to the full range of maintenance options.

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 MetaMation, pressing the Help icon  will display the help for the area you are using. The major features of the screen are as follows:



Metamotion

Quick Search Area

Help and Exit

Navigation Area and set-up options

Filter Panel Contents

Search inside, hide or maximise panel

Action Icons. Hover for help

Metrics. Hover for details, right click to expand

Documents, Nodes, Alerts or Tables. Hover for details, or click to access

Metamotion Version 1.0

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System Configuration Step Through

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

User Maintenance

From the navigation menu, select the "User Maintenance" option. The screen will show all the defined users within the system as follows:



User Name	Department
chuck Hudson	Sales
Conrad Reilly	Sales
Denise Brown	Admin
Don Smith	Sales
Hans Franks	Sales
Laurence Rama	Development
Lindsay SNow	Sales
Marty Methlin	Sales
Paul Smith	Sales
Peter Lock	Development
Rebecca Nice	Admin
Samual Jones	Sales
Simon West	Development
Sir Bob Holness	HEAD
Super MM Admin	HEAD
Tim Lawes	Development
Trevor Franks	Sales

You will notice that different users have different levels of authority, which means that have access to different features of Metemation, and this dictates what they can do within the application. Click on Peter, and his details will be displayed as follows:

User maintenance.

User Code:

Name:

Department: ▼

Password:

Verify password:

Status: ▼

User Type: ▼

Email Address:

[Creation Details](#)
Created by Simon West on 30/10/2006 at 12:17 PM

[Last Login](#)
23/04/2007 at 12:34 PM

The details can be changed, the user made inactive, password changed, or other aspects of the user changed. In this case, we will leave Peter unchanged. Press cancel to return to the user list.

Document Classes

From the main navigation menu, select the Document Classes option from the menu. This process 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. With the demonstration database, the listed document classes will be as follows:

Document Class	
Class Code	Description
SPRES	Sales Presentations
IPRES	Internal Presentations
SPEC	Specifications
INV	Invoices
ISO	ISO 9001/2000 standards
SVREP	Site visit Report
TAC	Terms and Conditions
NDA	Non Disclosure Agreement
PPLAN	Project Plans
DTA	Customer data
New	

The classes already present are a narrow selection of typical business documents. We are going to create a new type of document for storing staff review records. You can click on any line to view/amend a document class. In this instance, press the **new** button to create a new class.

The document class definition screen will be shown. Create a new document class for a document review as follows:

Maintenance

Class Code:

REV

Description:

Staff Reviews

Status:

Active

▼

Creation Details

Created by Sir Bob Holness on 4/27/2007 12:39:13 PM

Save

Cancel

When you press **save** to complete the entry, you will be returned back to the document classes list with the Review document added.

Node Types

Node types are used to classify the purpose or use of nodes defined. Typical node types may be Internal, External, Project, Administration etc.



Select the **node types** menu option from the main menu, and you will be presented with the following list of node types already defined:

Node Types	
Type Code	Description
COMP	Company General Storage
SALES	Sales and Marketing
ADMIN	Administartion
HR	Human Resources
PURCH	Purchase Records
R&D	Research And Development
DEV	Development Projects
PD	Product Development
TEST	Product TEsting
LEG	Legals

As with all the other maintenance options, you can select a line to amend a node type. We are going to store review records in the Human Resources nodes. Select HR and view the details available.

Node Creation

When we create staff review records, we need a place to store them. We could use any of the nodes already defined, but instead, we are going to create a new node (virtual file) with Human Resources are called "Staff performance".

The node creation can be selected from either the Navigation menu or the "New" button on the My Nodes list. When selected, the new display screen will be presented with a blank node. Create a description, synopsis as follows:

General	
Add New Node:	
Description:	<input type="text" value="Staff Perfomance"/>
Nodes Type:	<input type="text" value="Human Resources"/>
Synopsis:	<div>Storage for all review records, performance figures, bonus schemes etc.</div>
Owner:	<input type="text" value="Denise Brown"/>

In the above example, because Denise controls the Admin area, Sir Bob selects Denise as the node owner.

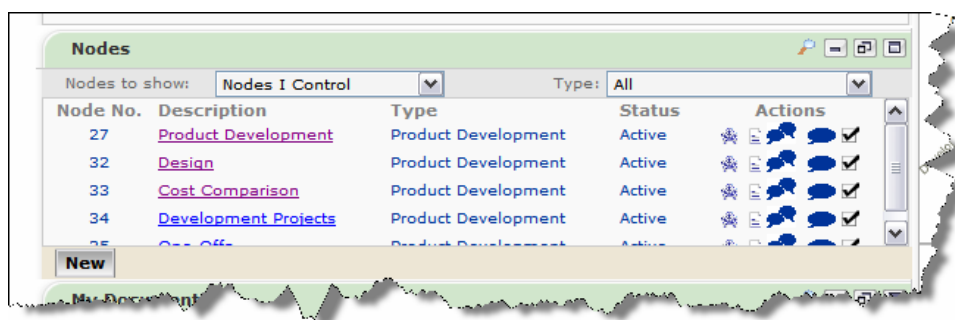
Press the **SAVE** button to save the new node.



Node Structure and Access

To log in as another user, either select LOGOUT from the navigation menu, or press the Logout button located in the top right of the screen (✖). You will be presented with the Metamotion login screen. Now, login as user “Peter” (password is electric).

From Peters home page, use the Filter on the “My Nodes” area of the display to change the views to “Nodes I control” and “Nodes I have access to”. For each option listed, notice in the list of nodes displayed that the new “Staff Reviews” node is not listed:



Peter cannot see the new node because he has not been granted access to it. Therefore, he cannot access the node, data or documents within it.

Logout from user Peter (select LOGOUT from the navigation menu, or press the Logout button located in the top right of the screen (✖)), and this time login as user Denise (password is again Electric).

For Denise, if you look at the My Nodes area (node I control), you will find the new “Staff Performance” node listed (notice how if you hover over the title, the full details are shown). You can edit the node by pressing the node properties icon against the node (⚙). This will take you back into the node maintenance routine for the node.

Denise wants the new node to be in her administration structure under “Human Resources”. In the parent panel, select “Human Resources” to create the relationship.

Denise also wants a separate area for old staff reviews, so use the **New Child** button to create a new child storage area as follows:



http://jaffa/Metamotion/nodes/NewChil...

Description: Old Reviews

Owner: Denise Brown

Node Type: Human Resources

Cancel Accept

Press the **Save** button to update the node and its structure within the organization.

Now, Denise wants Peter to be able to see any documents placed into the Staff Review area, but only to view the documents, not to change them. Therefore she grants Peter access to the Node.

Against the “Staff Performance” node, use the green grant icon (🔒) to grant node access to Peter. The grant window is then displayed for the node. This allows you to select one or more users, and control what level of access they have on the node/document/table, and whether this access flows down to child nodes (the historical Staff Reviews).

To grant access to Peter to view the staff performance reviews, set the grant access as follows:

Define Grant Access for : - Nodes(46)-Staff Performance

Grant Set On: Nodes

Description: Staff Performance

User List:

User Code	User Name	Grant Level	Grant Flow
Peter Lock	Peter Lock	Viewer	No
-Select-		-Select-	-Select-

Press **save** to grant the access, and then press **Home** to return back to Denises home page display. Notice that the Grant icon turns red to show that a special grant on this storage node is in place.

To complete the granting of access, find the ISO Compliance storage node, and grant Peter and Don view only access to the ISO node.

Document Type Templates

To make life easier for anybody performing staff reviews, we want to define a document template to be used. Staying logged in as user Denise, select the **Doc Class Templates** option from the main navigation menu.



The existing documents classes will be listed. However, you will notice that none can be selected. This is because they have been defined higher in the structure that Denise has access to. This does not stop her creating new templates for her work areas.

Select the **New** button for a new document class template. The screen presented allows a document class to be defined, selecting the starting (highest) node point, and a class of “Staff Reviews”. Next, enter a document reference of “ANYCO-SREV-????” as follows:

General

Class Template Maintenance

Node: Human Resources

Class: staff Reviews

Document Ref: ANYCO-SREV-????

Document Template

Browse...

Creation Details

Created by Denise Brown on 5/4/2007 1:00:40 PM

Save Cancel

The Node of Human resources is the top node, any node below human resources (including our new Staff Performance” node will inherit this template definition. For the document class of “Staff Reviews”, we are generating a default document reference of “ANYCO-SREV-????”.

The ???? is used to indicate that we want the system to number the documents with a 4 digit number starting with “0001” (an entry of “??????” would generate a 6 digit document number). The series of “?” characters can go anywhere in the document reference. ANYCO is the name of the demo company, and the SREV is simply to indicate Staff REVIEW.

Next, use the **Browse** button to browse your own computer for an appropriate document to use as a template (any document will do, we are only playing here). When you are done, press **Save** to save the template.

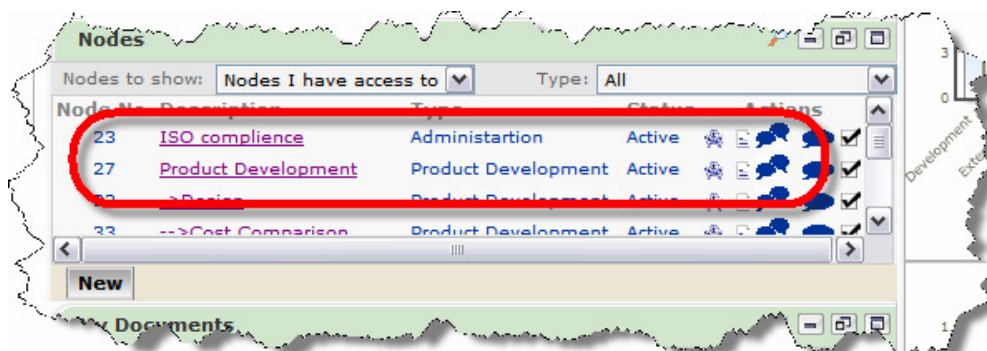
Creating Documents

To create a new document, we are going to use Peter. To log in as another user, either select LOGOUT from the navigation menu, or press the Logout button located in the top right of the screen (✖). You will be presented with the Metamotion login screen. Now, login as user “Peter” (password is electric).

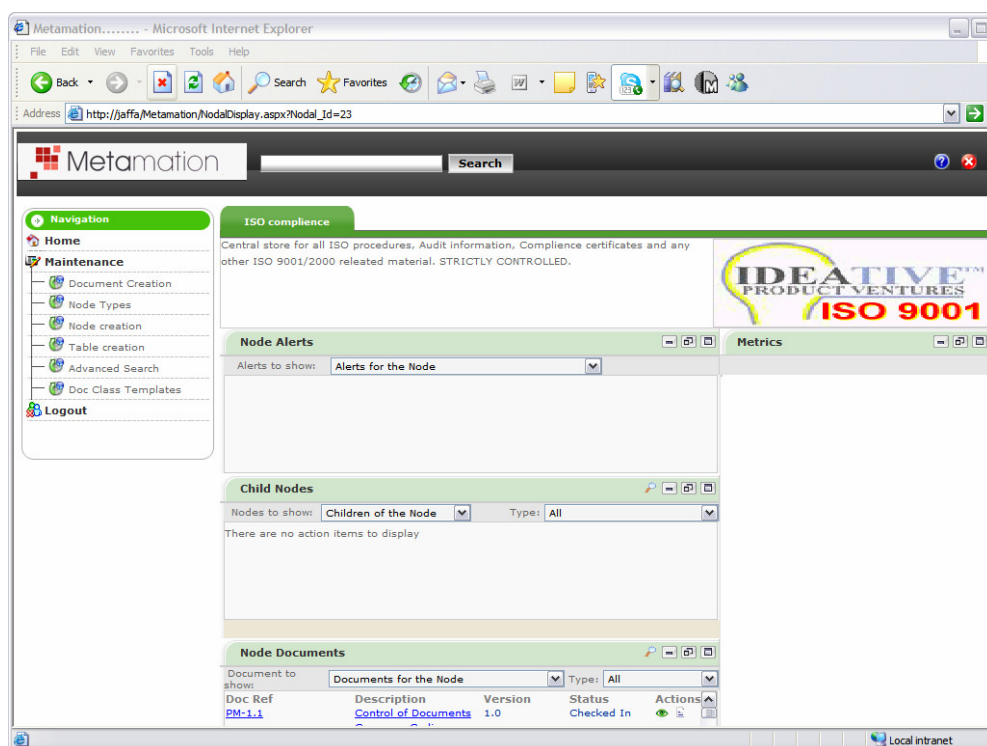


First of all, notice that the granted Nodes (ISO Compliance and Staff Performance) is not listed under the “My Nodes” section where the default view of Node I control is shown.

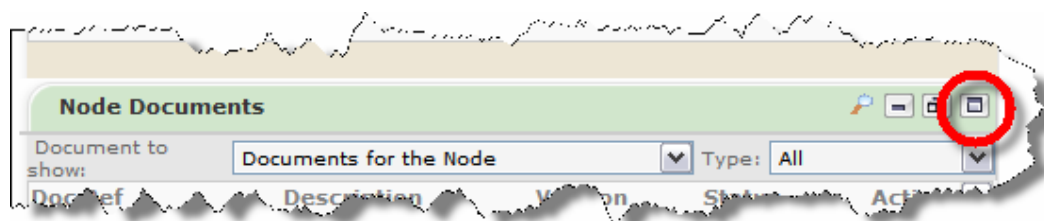
However, change the Node view (using the pull down selection) to “Nodes I have access to”, and you will see the granted nodes listed as follows:



To view the contents of the ISO Compliance node (to see the ISO documents), simply click on the underlined title of “ISO Compliance”. You will jump into the “Nodal view” which concentrates on that node as follows:



There are no alerts for the node, and no children node, so we don't really need to see that. What we are really interested in is the documents. To view just the documents, select the maximise icon as follows:



You will notice that for the ISO compliance area, icons and controls such as the **New** button does not exist. This is because we only granted Peter view access to ISO. To create new documents, we need to return back to Peter's home page.

Select **Home** from the main navigation menu.

To create documents, we can use one of two methods. We can either select **"Document Creation"** from the main navigation menu, or we can use the **New** button at the end of the "my documents" list. Select either option to create a new document.

The document creation allows a document to be created, with the controls at the top of the screen allowing selection of the storage node (where the document will be filed), the document type and document class to be selected. We want to create a Site visit report as part of the development project, so please set the document controls as follows:



We could specify our own document reference, or have Metamotion generate a new reference for us. To generate the next available number, press the **NEW** button against the reference. As the reference template for the site visit report is "AC-SVREP-????-06", and as this is the first site visit report document, the number "AC-SVREP-0001-06" will be generated.

Next, enter a description, a version and (if you want) a synopsis to describe the document as follows:





Finally, to get started on the document editing, press the **Download Template** button to save or open the document. Save the document to your desktop (or work location), and you can edit the document (if you wish).#

Now press **Save** to commit the document, and return to the home page. You will notice that in the “My Documents” area, your new document will be listed with a status of “New Document”.

Checking in Documents

Once a document has been created and you have edited it, it can be checked into the system. Checking in a document makes it available for others to use, view etc. There are two methods of checking in a document – either select the document properties icon against the document (📄) or by selecting the check in icon against the document (📁). If you use the document properties option, then once the document properties window is displayed, the document check in icon (📁) will be shown at the top of the screen.

When you select the document check in option, the document check in screen will be displayed, allowing you to select the location of your updated site visit report. Use the **Browse** button to locate the local copy.

If required, at this stage you can update the version number and synopsis. For this example, the version and synopsis are file, so leave these as they are.

Finally, there is an action to perform. We just want to check this document in, so leave the default option as “check in” and press submit.

You will be returned to the main home page, and you notice that the site visit report you have created and checked in has been removed from the list of “Documents check out to me”. This is because you have checked the document in, and therefore are not working on the document.

Checking Out Documents for amendment

Even though we have just checked the document in, we will check it out to carry out some amendments. To find the document, change the drop down option on the My Documents area to any of the following:

Documents owned or created by me – As Peter has created the document, it will be listed here.

Documents last submitted by me – It was last submitted by Peter, so also will be listed here

Find the document (reference AC-SVREP-0001-06”) in the listed documents, and check the document out. To check out a document, again, there are two methods. Either select the document properties icon against the document (📄) or by selecting the check out icon against the document (📁). If you use the document properties option, then once the document properties window is displayed, the document check out icon (📁) will be shown at the top of the screen.

When you select the document check out option, the document will be downloaded to your pc (select where you want to save the document to), and it will be marked as checked out by you.



You will be returned to the main home page, and you notice that the site visit report is once again back in the list of “Documents checked out to me”. This time, the status of the document is “checked out”

Checking in Documents for Review

Again, we are going to check in the document (you can amend the saved version if you like). Select the check in icon against the document (📁).

Again, the document check in screen will be displayed, allowing you to select the location of your updated site visit report. Use the **Browse** button to locate the local copy.

Because this is a new version, you need to change the version number to version 1.1.

When we check in this document, we want people to review the document and give us back feedback (or mark it for approval for distribution). On the next action, you can select “Submit for Review” to have people review the document for errors, or “submit for Approval” for approval to complete/distribute the document. In this case, we are going to have the document reviewed, so select “submit for Review” and **submit** the document.

You will then be taken to the review panel screen, allow you to select who you want to review the document. We want DON to review the document, so select DON from the list of available users, and tick the Review box (if you tick approve, he can also sign off the document as complete).

Document Review/Approve : AC-SVREP-0003-06 : Site visit report to an internal customer

Document Reference:

Description:

Version:

Action: Days for Action:

Reviewer / Approval List:

Reviewer Code	Reviewer Name	Active	Review?	Approve?	Status	Delete?
<input type="text" value="Don Smith"/>	<input type="text" value="Don Smith"/>	<input type="text" value="Yes"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Pending"/>	<input type="checkbox"/>
<input type="text" value="-Select-"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

Don needs to know how long he has to review the document, so enter in the **Days for Action** the number of days for review (weekends and bank holidays included). Then save the document, and it will be checked it, with a status of Pending Review.

The review list you have selected will stay with the document, regardless of how many times you check in or check out the document. However, each time you check in the document, you will have the ability to update the list, add reviewers, remove reviewers etc.



Working with Data tables

Data tables allow structured information to be held within the system. This data can be accessed in tables and forms, and documents can be tagged against the structured data (allowing you to hold say invoices against customers or suppliers).

Data can be defined in Metamotion to be held and entered directly into Metamotion (removing the need for external spread sheets and access databases), or can be fed into the system from sources.

Table Definition

To show how tables work, we are going to create a table to hold a list of company turnover figures for last few years. We should already be logged in as user Peter, the user who is going to define the Table.

There are two methods of creating tables. Either select the **Table Creation** option from the main home page navigation menu, or select the **New** option under the "My Data" control panel. Both options will take you to the data table creation process.

First of all, we describe the table giving it a description and (if we want) a synopsis with more information as follows:

The screenshot shows a web form titled "Add New Table Definition". It contains three main input areas: a "Description:" field with the text "Company Turnover", a "Record Type:" dropdown menu currently set to "Multi Record", and a "Synopsis:" field with the text "Company turnover per year". The form has a light green header and a white body with a subtle shadow effect.

The Record Types is used to indicate if per storage node we want to hold multiple records. If we one want to ever one record per node (say, a project file containing who the project node is for, or a budget figure per project, etc), then we can change the definition.

Next, we set general access information regarding who can edit the table, if the table is shareable (everybody can see and use the table, regardless of where they are in the company), and the activity status.

In e prompt for the Data Time Period, most tables will be Indefinite, in that a record created is an item of data, regardless of the time frame (say for company details etc). However, we can indicate that data held is specific to a particular time frame. In our example (yearly turnover figures), we want to hold a turnover per year, so the DateTime Period will be yearly. When we select year, we are also asked for a start of year (which we will set for April, financial year start) as follows:



Data Edit Mode:	Anybody can add, edit or delete
Data Time Period:	Yearly
Start Of Year:	April
Active Status:	Active
Share Status:	Fully shareable
Node:	Product Development

If we wanted to, we could use the External Data Connection to set the table to be automatically populated from a variety of data sources such as ODBC data connections, SAP, Oracle, SQL Server, Access etc. However, in this example, we are going to hold the data locally.

To define the structure of the table, continue with the **Define Content** button.

The table definition, is split into two. On the left is the columns already defined (none in this case, as it's a new table), and to the right is space to create a new columns. We want to define space for a division name, turnover, profit, date of audit and auditing company name.

To create the division, in the column name, enter what you want to call the column (Division), and as this will be the principle key of the table, in the data store, select the column ID. The data store is where we want to store the data in the predefined Metamotion Meta fields.

Column Name:	DIVISION
Data Store:	ID
Entry Label:	Division
Source:	

Under validation settings, we want this set from one of three demo division names – EUROPE, USA or UK. To ease data entry, we can put these in an Entry list, and Metamotion will provide a pick list during data entry. Enter the list separated by semi colons in the Entry list as follows:

Entry List:	EUROPE;USA;UK
Valid Table:	Select...



All the other settings for this column and OK (It is mandatory, we do want to filter, and we do want to show it on the summary screen), so press **Add** at the bottom of the screen to add it to the column list. The division now appears on the list on the left.

Next, add a column TURNOVER. This is a numeric figure, so map this to data store VALUE1. In this case, we want to produce statistics on this information (some graphs, charts etc), so we need to make this a shareable metric. Under the Meta Data flow, give it a name of TURNOVER, and a Meta description of Company Turnover. Finally make it Meta group 1, and lets display this as a line graph as follows:

The screenshot shows a configuration window for a column named 'TURNOVER'. The 'Column Name' field is set to 'TURNOVER'. The 'Data Store' dropdown is set to 'VALUE1'. The 'Entry Label' field is set to 'Turnover'. The 'Data Source' dropdown is empty. Below this is a 'Meta Data Flow' section. The 'META Name' field is set to 'TURNOVER'. The 'META Desc' field is set to 'Company Turnover'. The 'Meta Group' dropdown is set to '1'. The 'Meta Spread' dropdown is set to 'No meta flow'. The 'Up Link' and 'Down Link' dropdowns are both set to '--Select--'. The 'Show Type' dropdown is set to 'Line Chart'.

It is pointless to filter on a number, so de-tick the filter option. All the other settings for this column and OK (It is mandatory, and we do want to show it on the summary screen), so press **Add** at the bottom of the screen to add it to the column list. The TURNOVER now appears on the list on the left.

Next, we are going to add profit. This is going to be calculated from the TURNOVER (we are going to use a very rough calculation that PROFIT is 80% of turnover – you have to pay some tax).

Add a column PROFIT. This again is a numeric figure, so map this to data store VALUE2 (you will notice VALUE1 is no longer listed as a data store as we have already used it). Again, we want to produce statistics on this information, so we need to make this a shareable metric. Under the Meta Data flow, give it a name of PROFIT, and a Meta description of Company Profit. Finally make it Meta group 1, and again lets display this as a line graph as follows:



Column Settings:

Column Name: PROFIT

Data Store: VALUE2

Entry Label: Profit

Data Source:

Meta Data Flow:

META Name: PROFIT

META Desc: Company Profit

Meta Group: 1 **Meta Spread:** No meta flow

Up Link: --Select-- **ID:**

Down Link: --Select-- **ID:**

Show Type: Line Chart

By making the two meta items the same group, they will appear on the same chart. However, if we wanted them on different charts, just give them different group numbers.

For the PROFIT column, we want to put in a calculation. Under the calculator prompt, enter "VALUE1 * .8" and press the parse button (✓) to check everything is ok. VALUE1 is where the turnover is stored – we are taking 20%. If we wanted to, we could have used the calculator wizard to build up the calculation. If everything is OK, the calculator should appear as follows:

Validation Settings:

Calculation: VALUE1 * .8

Parsing Successfully Completed

Data Filter: ☐

Again, it is pointless to filter on a number, so de-tick the filter option. All the other settings for this column and OK (It is mandatory, and we do want to show it on the summary screen), so press **Add** at the bottom of the screen to add it to the column list. The PROFIT now appears on the list on the left.

Next, we want to add the date of Audit. This is as per the other defined columns. We want to map the audit date against a Data Store of DATE1 (which will mean we have the benefit of a pop-up date selector during data entry). We can use the Format area to specify the format of date we want to store as follows:



The screenshot shows a 'Column Settings' dialog box with the following fields:

- Column Name:** Audit Date
- Data Store:** DATE1 (dropdown)
- Entry Label:** Audit date
- Data Source:** (empty dropdown)

Below this is the 'Meta Data Flow' section:

- META Name:** (empty text box)
- META Desc:** (empty text box)
- Meta Group:** ☐ (unchecked)
- Meta Spread:** No meta flow
- Up Link:** --Select-- (dropdown) ID: (empty text box)
- Down Link:** --Select-- (dropdown) ID: (empty text box)
- Show Type:** Line Chart (dropdown)

Below that is the 'Validation Settings' section:

- Max Length:** 8
- Format:** DD/MM/YY (dropdown)
- Entry List:** (empty text box)

Check that the filter button is ticked as we may want to filter this information. Un-tick the Mandatory tick box, as the audit date may not be required. Now **Add** the audit date to the list on the left.

Almost there. Just the Audit Company to add. We will make this stored in the NAME data store as follows:

The screenshot shows a 'Column Settings' dialog box with the following fields:

- Column Name:** AUDIT-COMPANY
- Data Store:** NAME (dropdown)
- Entry Label:** Audit company
- Data Source:** (empty dropdown)

Below this is the 'Meta Data Flow' section, which is partially visible.

Check that the filter button is ticked as we may want to filter this information. Un-tick the Mandatory tick box, as the audit company name may not be required. Now **Add** the audit company to the list on the left.


If everything went ok, then we should have the following defined columns and formats:




Column Name	Data Field	Data Label	Len	Format
DIVISION	ID	Division	25	
TURNOVER	VALUE1	Turnover	9	
PROFIT	VALUE2	Profit	9	
Audit Date	DATE1	Audit date	8	DD/MM/YY
AUDIT-COMPANY	NAME	Audit company	50	






The last thing we want to do is define a screen layout, which puts the columns in the order we want to see them on screen. At the bottom of the page, select the **Display Layout** button.

We are going to divide the screen into two sections, Turnover and Audit.

Against Division, select the Add Section icon (), and add a section called Turnover, with a group order of 1 (group order indicates how the sections are ordered on screen. We want this to be at the top, so we give it a low number).

Against Audit Date, select the Add Section icon (), and add a section called Audit, with a group order of 2 (so the Audit section appears below the Turnover section).

Now, on the listed fields, use the drop down lists to select which section they appear in, and then use the prompt order to say what over on screen the prompts should appear in (1 is first, 9999 is last, as follows:

Column Name	Data Field	Prompt Label	Display Group	Group Order No.	Prompt No.
DIVISION	ID	Division	Turnover 	1	1
TURNOVER	VALUE1	Turnover	Turnover 	1	2
PROFIT	VALUE2	Profit	Turnover 	1	3
Audit Date	DATE1	Audit date	Audit 	2	1
AUDIT-COMPANY	NAME	Audit company	Audit 	2	2


If you want to preview how the screen will appear, press Save and then display Layout. You can even use this screen to test the drop down division list and pop-up calander controls.

When you are back on the Table Column Definition screen, press **Save** to save all your work, and then select Home from the main navigation window to return to the **home** screen.

Table Data Entry

When you return to the home page for Peter, you will notice that there are no graphs for turnover. This is because there is no data entered in the Turnover table



to graph. To enter data, go to the “My Data” panel and you will see at the end, the Turnover table just defined. Select the Data view icon () to start entering data.

The initial screen display is there to allow records to be filtered, added etc. We will come back to filtering in a moment. First, we need to add some records. Select the **New** button to add a new record. The screen which appears should look famillure from the display layout.

Performing Basic Searching

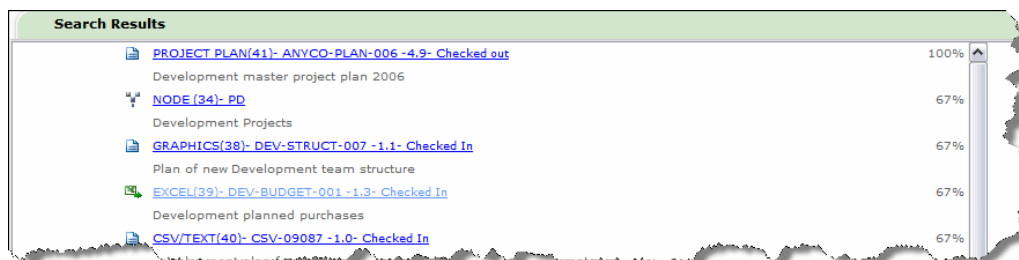
The documents, storage nodes and data that has been entered can be searched for and located in a variety of different ways, depending on what you need to search for, and where you are in the system.

When using Metamotion, at the top of every screen displayed, the basic search facility is shown as follows:



Within this header bar, the entry box allows entry of a search criteria as per searching for text within a search engine (such as google). Entering text on its own treats each word as a logical OR, which putting text in quotes will search for specific references.

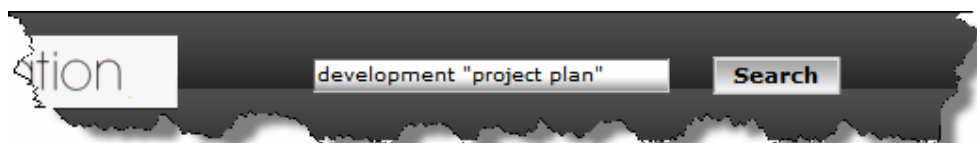
As an example. Log in as user Peter (password) and in the search bar at the top of the screen, enter a search text of “Development Project Plan” (without the quotes), and press either the **Search** button or press return. The search will be carried out and the results will be shown as follows:



Each document found with a description which meets the selection criteria is listed, ranked in order of those that most fit the expression. The first document includes all words, whereas the 2nd and 3rd document contains 2 out of the 3 words..



Now, in the search window at the top of the screen, use quotes to turn “project plan” into a phrase as follows:



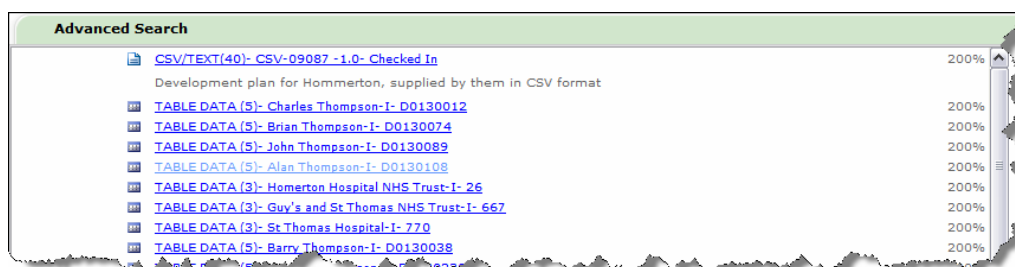
When you search this time, you will see less results, as only documents or data which have the word development, or the phrase “project plan” will be included. To view the results, hover over the item to see the pop-up synopsis of the located item, or click the item to view the contents, read the document etc.

Performing Advanced Searching

The basic search searches just on documents, storage nodes and defined tables where the item reference or description meet your specified search criteria. To perform more advanced searches, select the **Advanced Search** from thmain navigation menu for user Peter.

When the advanced search window is displayed, the default options selected will perform the same search (and will display the same results) as the basic quick search. However, options are available to search the synopsis of documents/tables/nodes, to specify to search for specific items controlled by a user, for a range of creation dates, and also to specify to search table data.

When you select to Search Data, this will search all defined fields for all data items within tables you have access to. To see the results, try the following. Change the search text to “Hom” and select “Search Table Data”. When you press **Search**, the results will be as follows:



Note that it lists a document for supply to Hommerton, and table records for various people with surname “Thompson”. Again, select any record to view the data or documents.



6 Further Installation Support

Metamotion and associated products (such as document scanning facilities, customer web portals, email portals etc) are fully supported by Touchstone Systems Limited.

Standard support is provided between the hours of 9:00am and 5:30pm GMT, Monday to Friday, excluding public holidays. Support outside of the standard hours can be provided where required. These support hours are applicable to all methods of requesting support on Metamotion.

Methods of Support:

Phone support is provided by calling 0845 434 8949.

Email support is provided by detailing your questions or problem to 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/issues. 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.