CalWebUserGuide

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Welcome to CalWeb!

CalWeb is an innovative and robust calibration software platform used by customers around the world to ensure quality, safety and dependability. This application allows individuals from multiple departments to gain full visibility of their organization's calibration program, reducing the time and effort needed to maintain compliance.

Features and Benefits

VISIBILITY

CalWeb provides a strategic window into the performance of your entire calibration program, with real time information and full asset visibility.

ENTERPRISE

Are you looking to centralize reporting for your local, regional and global operations all in one place? CalWeb includes a sophisticated enterprise view that aggregates data across multiple locations.

RELIABILITY AND SECURITY

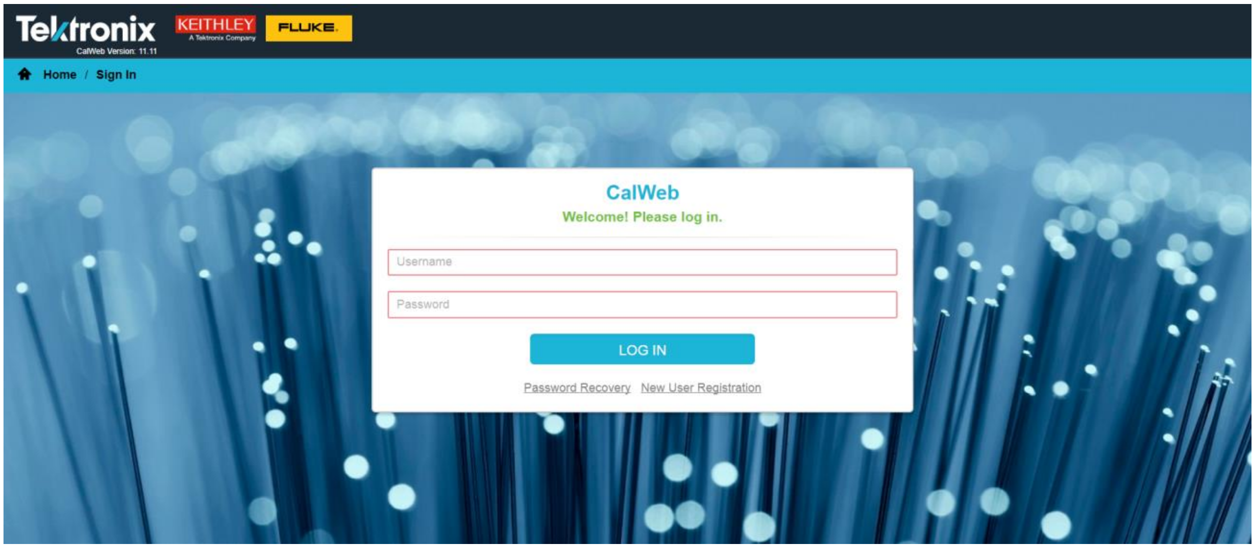
The CalWeb data center maintains a 99.5% availability rate, protected by extensive back-up power, multi-layered security, and network redundancy.

COMPLIANCE

For quality assurance, CalWeb records all data modifications and notifies appropriate personnel of changes. CalWeb is compliant with rigorous standards like the FDA's guidelines for electronic records and signatures – 21 CFR Parts 11 and 820.

Login Screen

To log in to CalWeb, go to: **https://calweb.tek.com.**



1. Enter your Username
2. Enter your Password
3. Click on the Log In button

Other Options

- Click on the Password Recovery link to recover the user password
- Click on the New User Registration link to request a new user account

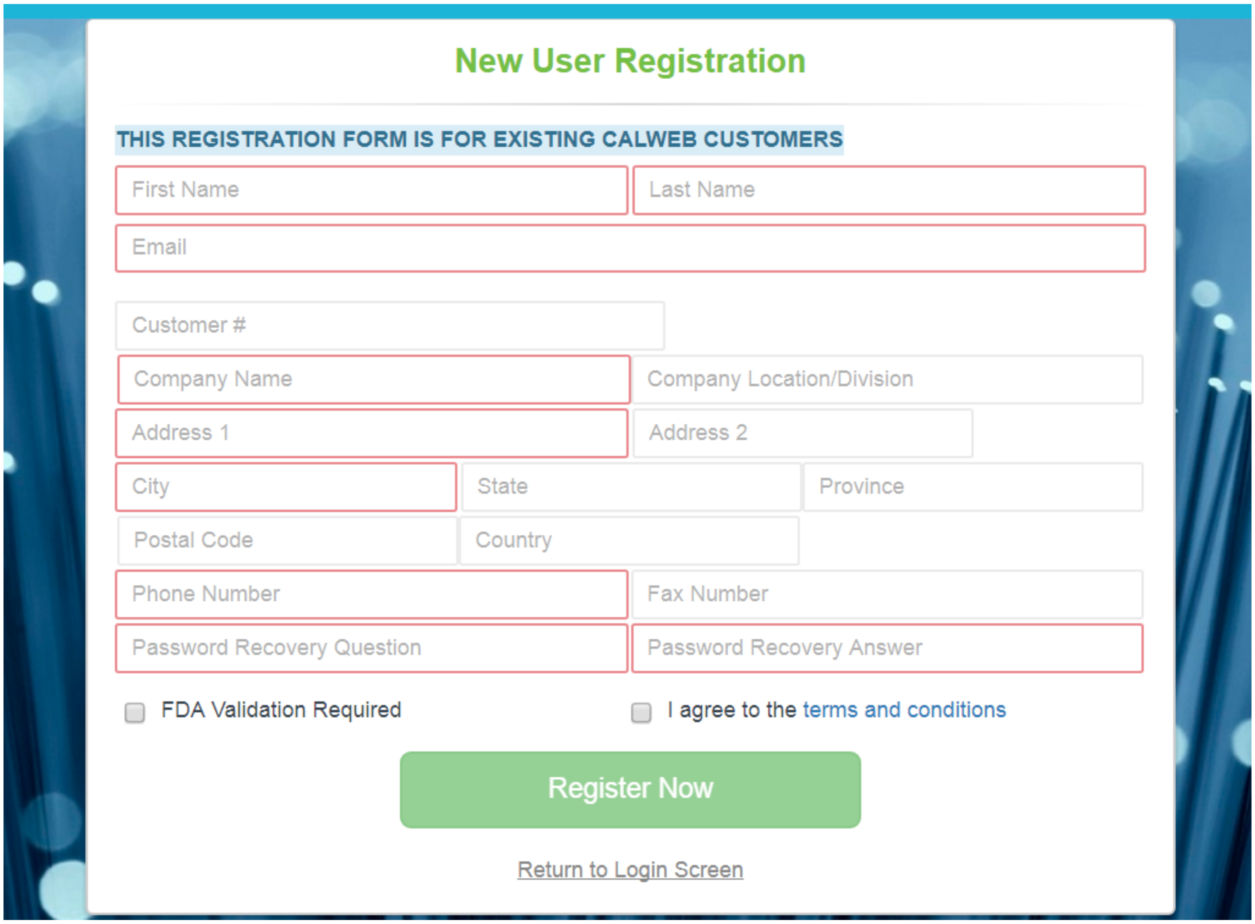
Demo User Account

The CALWEB system has a Demo user account that can be used to familiarize the user with CalWeb. To access the Demo account, go to the CalWeb login screen at **https://calweb.tek.com**. Use the following username and password:

- Username: **calwebdemo@tek.com**
- Password: **Password1**

New User Registration

To request a CalWeb account, go to the login screen at **https://calweb.tek.com** and click on the New User Registration link. Enter requested information and submit. A verification email will be sent when the account is activated.



Required Items

The following items, outlined by a red box, are required:

- First Name
- Last Name
- Email
- Company Name
- Company Address
- Company City
- Phone Number

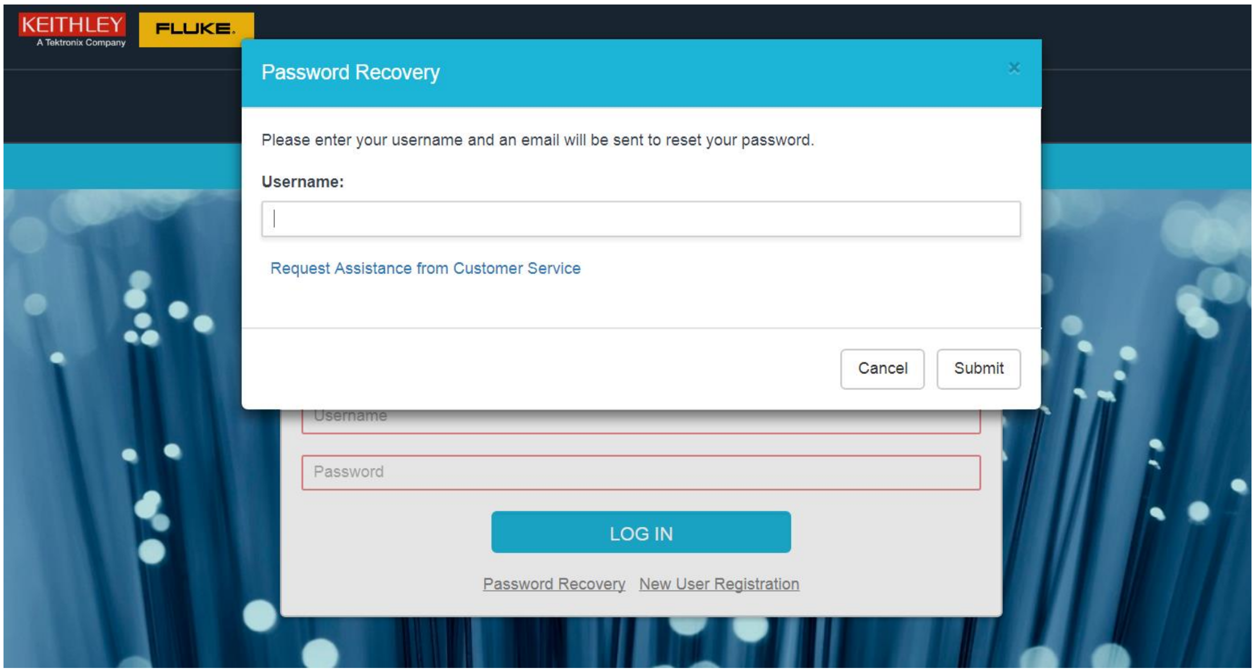
- Password Recovery Question
- Password Recovery Answer

Other Items

- Customer Number - Please contact the servicing branch to obtain the customer number or contact Customer Service at **1-877-477-8204**
- FDA Validation Required - If this is enabled, an email notification will be sent to the user for CalWeb Releases and any other down-times

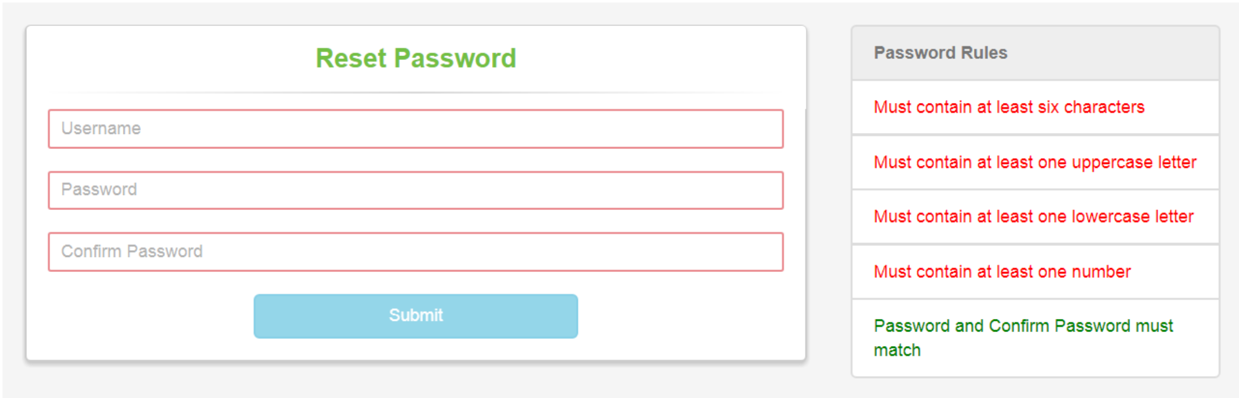
Password Recovery

To request your password, go to **https://calweb.tek.com** and click on the Password Recovery link. Enter Username and submit. An email will be sent with a link to reset your password.



Password Requirements

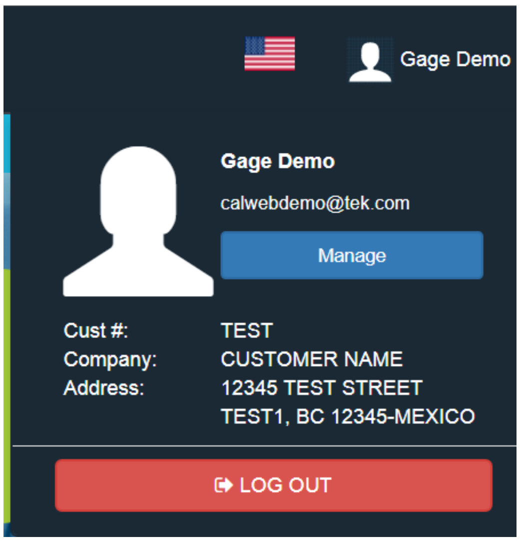
- Must contain at least six characters
- Must contain at least one uppercase letter
- Must contain at least one lowercase letter
- Must contain at least one number


Reset Password
Username
Password
Confirm Password
Submit
Password Rules
Must contain at least six characters
Must contain at least one uppercase letter
Must contain at least one lowercase letter
Must contain at least one number
Password and Confirm Password must match

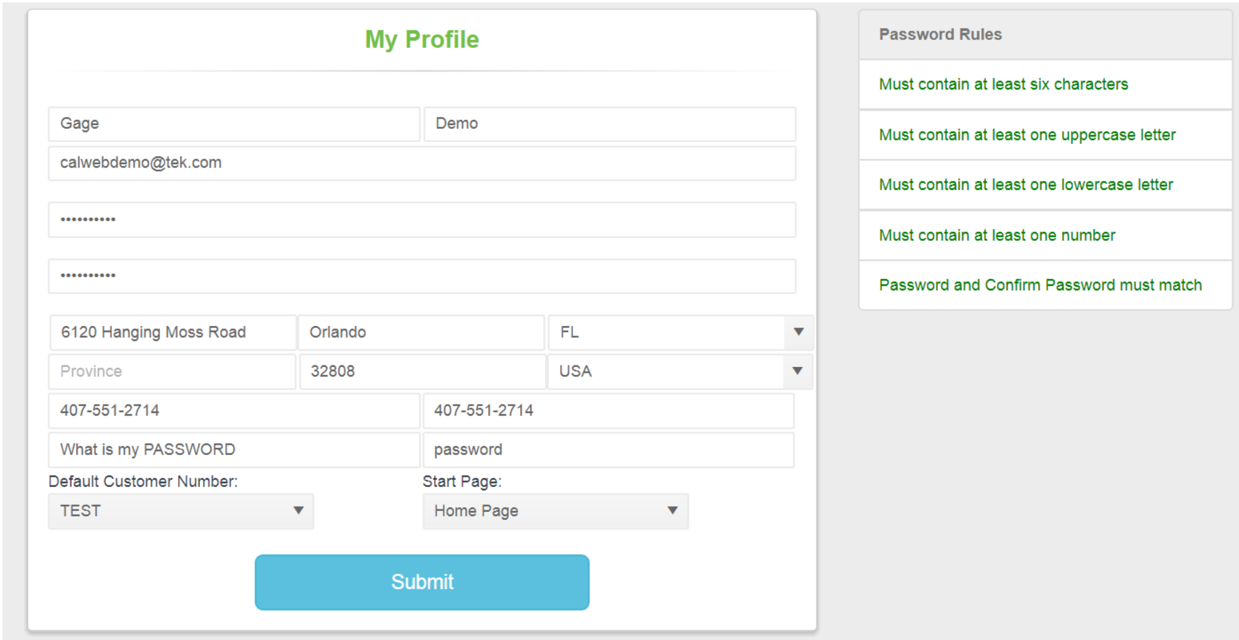
Manage User Account

The Manage User Account feature enables the user to make changes to CalWeb account information such as the Name, Email, Company Address, Password, Start Page and Default Customer Number.

In order to access the Manage User Account feature from the CalWeb menu, click on the user name in the upper right-hand corner and then the 'Manage' button.



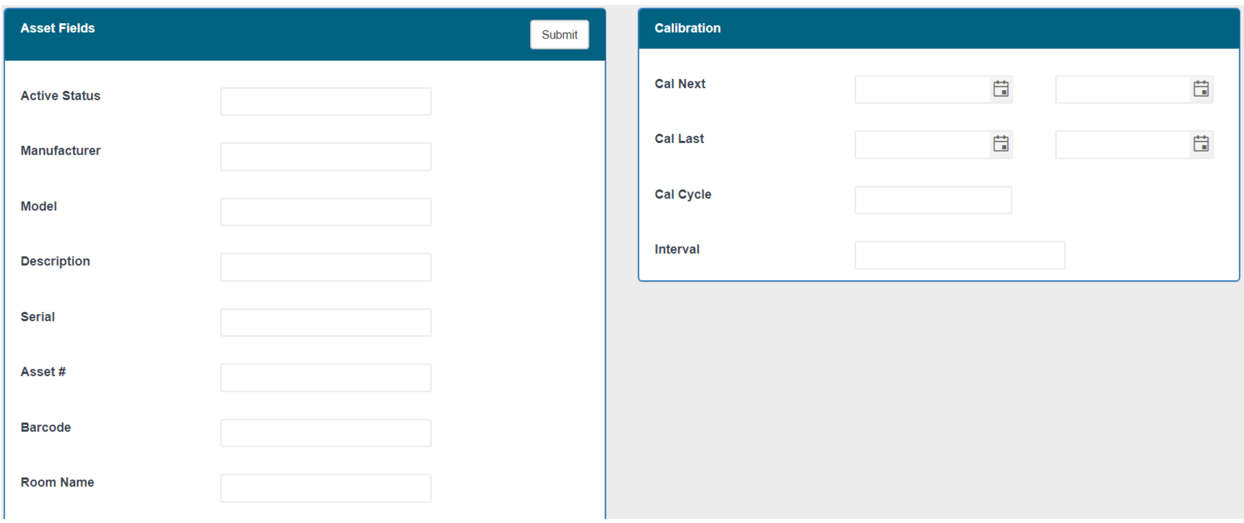
Enter the new information in the proper fields, then click on the 'Submit' button to save the changes.


My Profile
Gage
Demo
calwebdemo@tek.com
••••••••••
••••••••••
6120 Hanging Moss Road
Orlando
FL
Province
32808
USA
407-551-2714
407-551-2714
What is my PASSWORD
password
Default Customer Number:
TEST
Start Page:
Home Page
Submit
Password Rules
Must contain at least six characters
Must contain at least one uppercase letter
Must contain at least one lowercase letter
Must contain at least one number
Password and Confirm Password must match

Simple Asset Search

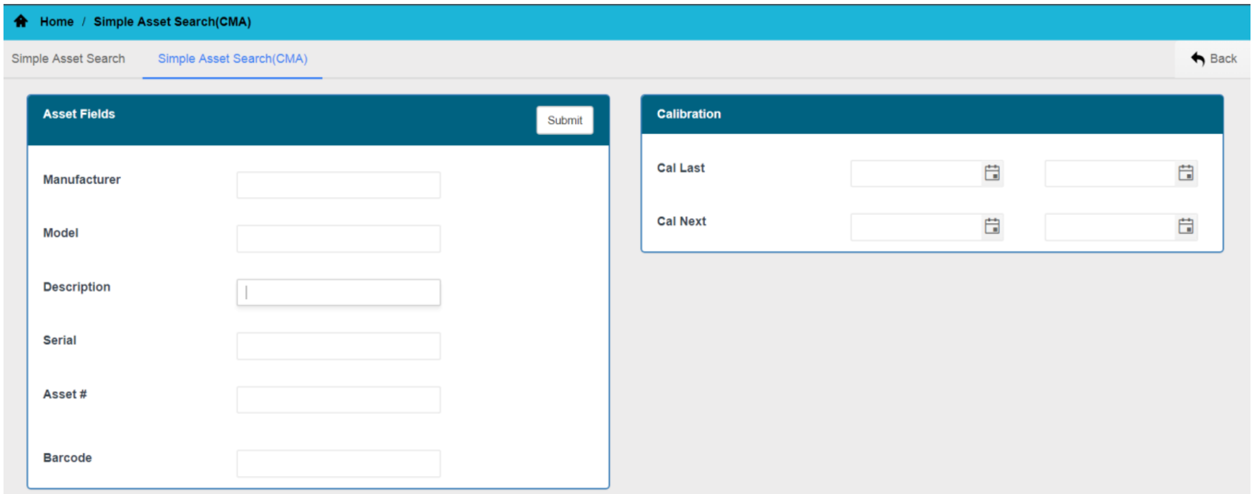
Tek Managed Assets

The Simple Asset Search allows a user to search Tek Managed Assets using specific criteria. This screen is accessible through the CalWeb Start Page via the ‘Simple Asset Search’ tile or through the menu bar via ‘Views >>Simple Asset Search’. To search for an asset you may select your criteria and click on the 'Submit' button. You will be redirected to the ‘Tek Managed Assets’ page with the filtered results.

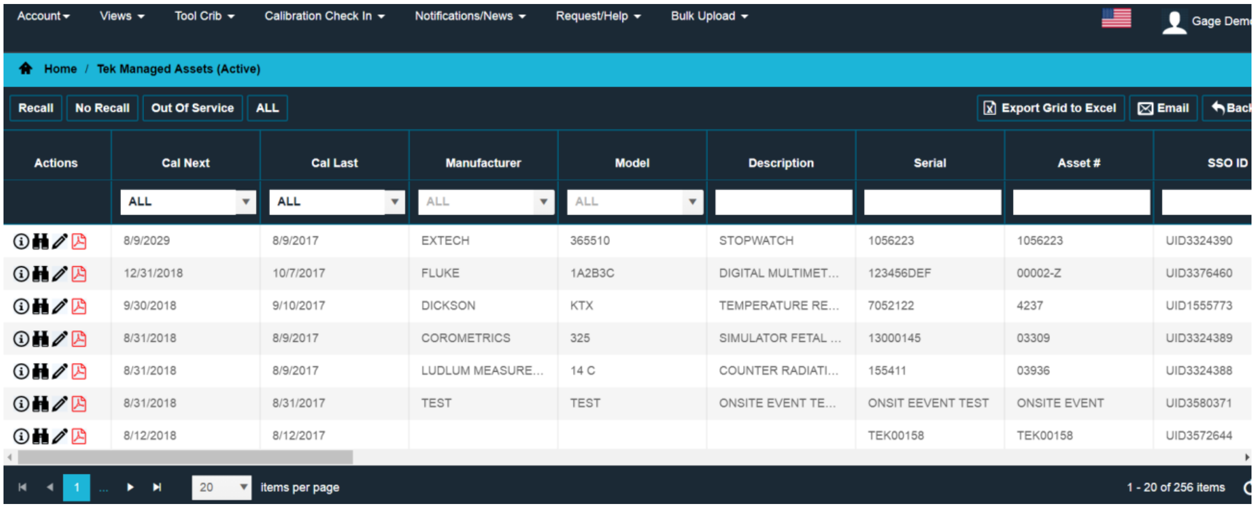


Customer Managed Assets

The Simple Asset Search allows a user to search Customer Managed Assets using specific criteria. This screen is accessible through the CalWeb Start Page via the ‘Simple Asset Search’ tile or through the menu bar via ‘Views >>Simple Asset Search’. On the Simple Asset Search page, click on the Simple Asset Search (CMA) tab. To search for an asset you may select your criteria and click on the 'Submit' button. You will be redirected to the ‘Customer Managed Assets’ page with the filtered results.


Home / Simple Asset Search(CMA)
Simple Asset Search
Simple Asset Search(CMA)
Back
Asset Fields
Submit
Manufacturer
Model
Description
Serial
Asset #
Barcode
Calibration
Cal Last
Cal Next

Tek Managed Asset List



Asset List

The Tek Managed Asset List displays the customer's inventory of assets serviced by SSO, including the most recent service event for each piece of equipment. In order to access the Asset List feature from the menu, click on the Tek Managed Assets tile on the 'Home' screen or click on the Tek Managed Assets tile in the 'Views' menu. The Tek Managed Assets screen provides links to the Calibration Certificates as well as links to the Asset Detail, Asset Edit and Request Info views. The asset list can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Asset List Views

Users can change the view of the Asset List screen by clicking on the following links at the top of the screen:

- **Active**: The screen displays all active assets, including assets with a "No Recall" status.
- **Recall**: The screen displays all active assets that are set up for recall notifications.
- **No Recall**: The screen displays assets that are excluded from the recall notifications.
- **Out of Service**: The screen displays assets that have been removed from service.
- **All**: The screen displays all assets belonging to the customer regardless of the status. This includes Customer Managed Assets as well.

Sort the Asset List

The Asset List screen can be sorted by clicking on the column heading. For example, to sort by Model Number, click on “Model #” at the top of that column. The arrow indicates the direction of the sort.

Filter the Asset List

The Asset List screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the “Manufacturer” column, select a manufacturer, and click on enter. CalWeb filters out all assets except the selected manufacturer’s assets.
Text Entry: To filter using text entry, enter the criteria into the field's text box. For example, under the word “Model #”, type WD1 and click the enter button. All assets will be filtered out except assets with model # WD1.
To remove a filter, click the X in the filter box.

Request Info

Click on the information icon in the 'Actions' column to view the Request Info screen. This screen submits a form to Customer Care pertaining to the asset.

View Asset Detail

Click on the binocular icon in the 'Actions' column to view the asset detail. The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and invoices.

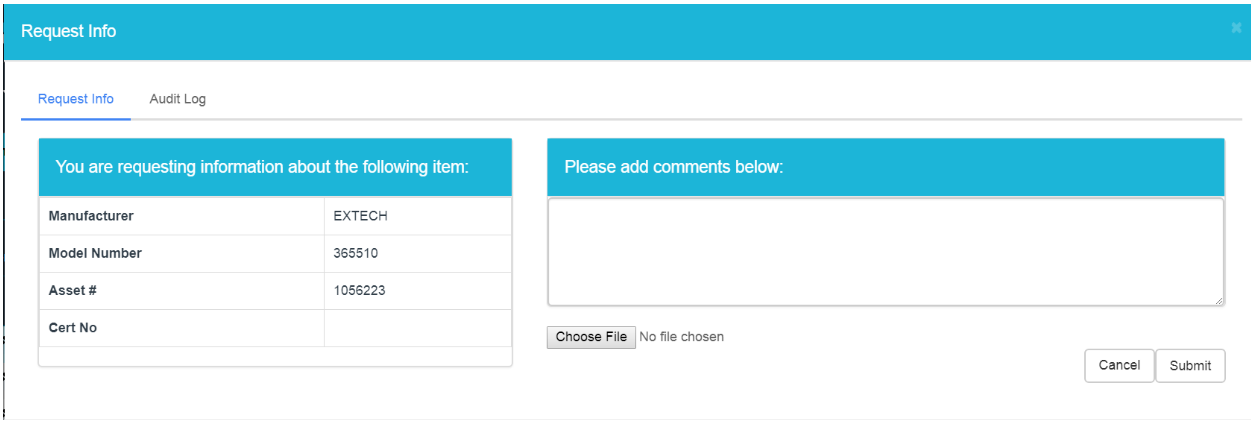
Edit Asset

Click on the pencil icon in the 'Actions' column to view the Asset Edit screen. The asset edit screen allows the user to make modifications to the asset.

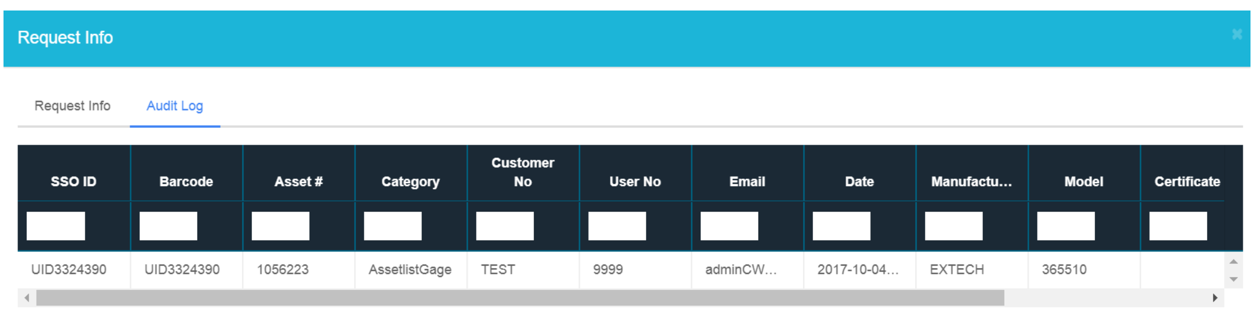
View Calibration Certificates

Point and click on the pdf icon in the 'Actions' column to view the current Calibration Certificate for a specific asset. The Calibration Certificate will open in an Adobe Reader (PDF) form. The certificate can be viewed, printed, or saved.

Request Info



The Request Info screen submits a request for information about an asset to SSO Customer Care. The asset information will be automatically displayed on the screen. The user can add comments and/or attach a file for submission.



Audit Trail

An audit trail captures all of the information requests for a specific asset.

Asset Detail Screen -Tek Managed Assets

The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and invoices. In order to get to the asset detail view, go to the Tek Managed Assets view and click on the binocular icon in the 'Actions' column.

Asset Detail Fields

The asset detail screen provides a display of the asset's data. This display can be customized to show whichever fields the customer prefers.

Request Info

The Request Info form provides a means of requesting or providing information pertaining to the asset. To access this form, click on the Information icon next to the Asset Detail title.

Move to CMA

Click on the Move to CMA button to copy the asset data to Customer Managed Assets. The user can then map the columns to transfer the data. The asset will be set to the Out of Service status in Tek Managed Assets and new asset will be created in Customer Managed Assets.

Work In Process Log

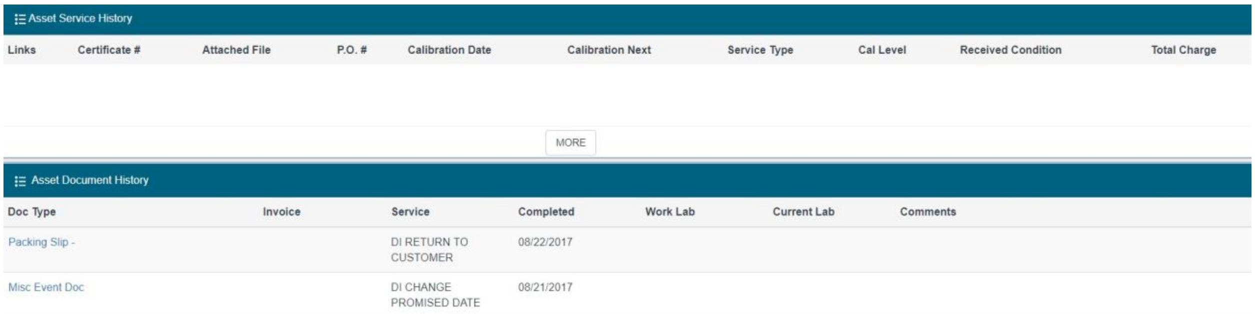
The Work In Process log displays the status of an asset if it is currently in the Work In Process queue.

Attachments

The attachments area allows users to add multiple attachments to the selected asset. Users may have the ability to add, edit or delete the attachments based upon their rights.

Department Email

The Department Email feature is a custom feature which allows emails to be sent using a department break out. This area displays the Department breakout information for customers with this feature.

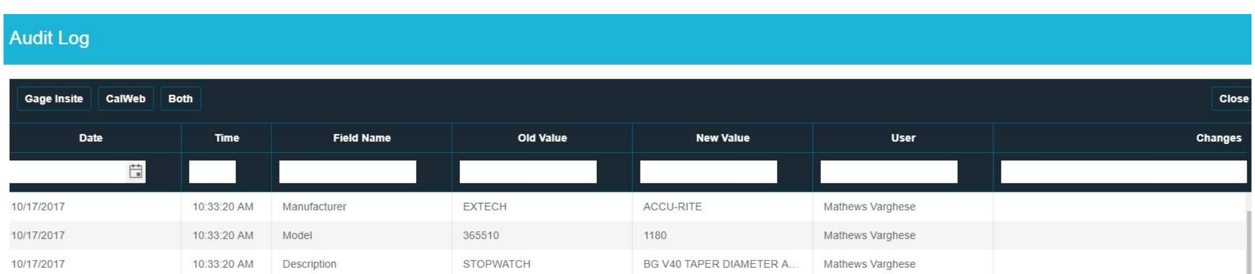


Asset Service History

The asset service history provides information regarding the asset's service events. Each service event provides a link to the certificate and/or certificate.

Asset Document History

The Asset Document History provides a list of documents associated with the asset as well as links to download the documents.

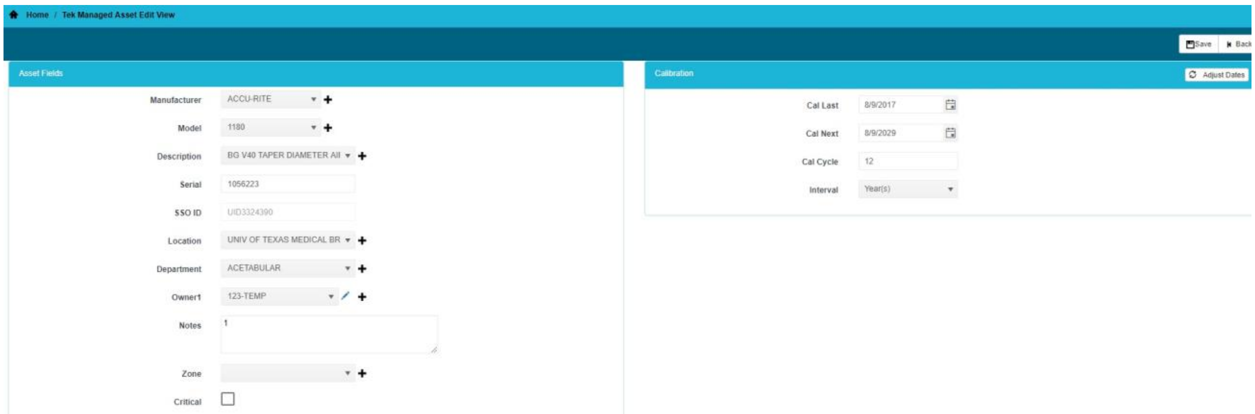


Audit Log

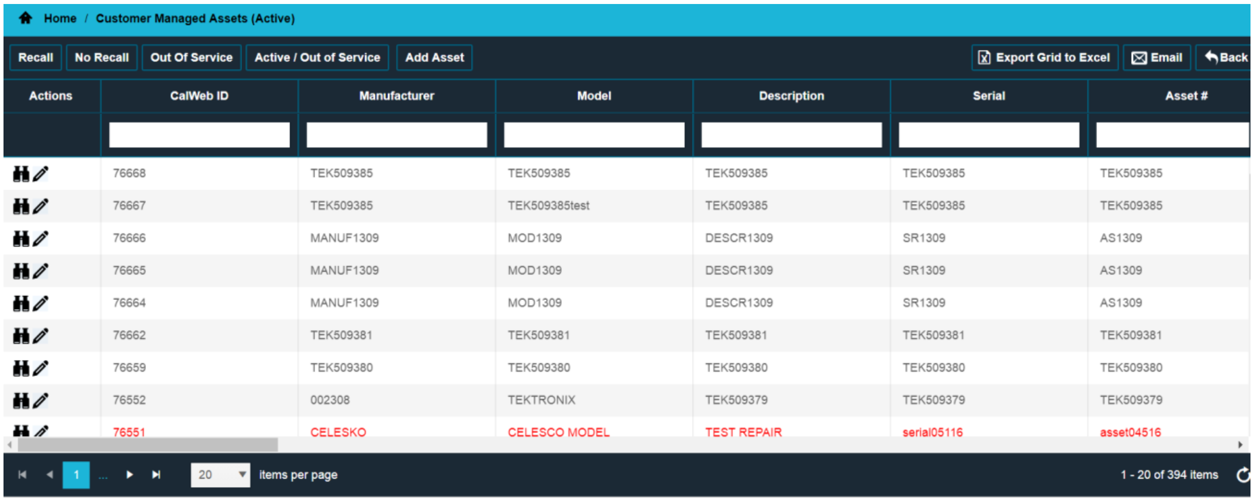
An audit trail is provided for each asset. Any changes made to the asset will be displayed in this area. Changes can be displayed for Gage Insite Only, CalWeb Only or both. This list is filterable, sortable and can be exported to excel.

Asset Edit Tek Managed Assets

The Asset Edit screen provides detailed information on a specific asset which can be edited by the user. In order to get to the asset edit view, go to the Tek Managed Assets view and click on the pencil icon in the 'Actions' column. The asset edit view is also accessible via the asset detail page by clicking on the Edit button. This view can be customized to show fields based on the customer's preference. Any changes made to an asset are stored in an audit log which is accessible via the asset detail page.



Customer Managed Asset List



Asset List

The Customer Managed Assets module is a feature that provides a platform for the user to add and manage non-calibrated or locally supported equipment/assets not serviced by SSO. The customer is responsible for maintaining and managing all assets not serviced by SSO that are added to the Customer Managed Assets module. In order to access the Asset List feature from the menu, click on the Customer Managed Assets tile on the 'Home' screen or click on the Customer Managed Assets tile in the 'Views' menu. The asset list can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Asset List Views

Users can change the view of the Asset List screen by clicking on the following links at the top of the screen:

- **Active**: The screen displays all active assets, including assets with a “No Recall” status.
- **Recall**: The screen displays all active assets that are set up for recall notifications.
- **No Recall**: The screen displays assets that are excluded from the recall notifications.
- **Out of Service**: The screen displays assets that have been removed from service.
- **Active/Out of Service**: The screen displays all Customer Managed Assets.

Sort the Asset List

The Asset List screen can be sorted by clicking on the column heading. For example, to sort by Model Number, click on “Model #” at the top of that column. The arrow indicates the direction of the sort.

Filter the Asset List

The Asset List screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the “Manufacturer” column, select a manufacturer, and click on enter. CalWeb filters out all assets except the selected manufacturer’s assets.
Text Entry: To filter using text entry, enter the criteria into the field's text box. For example, under the word “Model #”, type WD1 and click the enter button. All assets will be filtered out except assets with model # WD1.
To remove a filter, click the X in the filter box.

View Asset Detail

Click on the binocular icon in the 'Actions' column to view the asset detail. The Asset Detail screen provides detailed information and history on a specific asset.

Edit Asset

Click on the pencil icon in the 'Actions' column to view the Asset Edit screen. The asset edit screen allows the user to make modifications to the asset.

Add Asset

To add an asset not serviced by SSO, click on “Add Asset” in the Customer Managed Assets screen.

Asset Detail Screen Customer Managed Assets

The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and PMs. In order to get to the asset detail view, go to the Customer Managed Assets view and click on the binocular icon in the 'Actions' column.

Asset Detail Fields

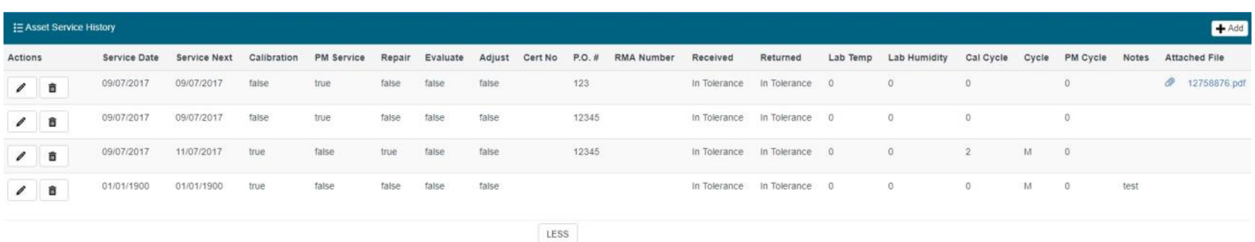
The asset detail screen provides a display of the asset's data. This display can be customized to show whichever fields the customer prefers.

Move to TMA

Click on the Move to TMA button to copy the asset data to Tek Managed Assets. The user can then map the columns to transfer the data. The asset will be set to the Out of Service status in Customer Managed Assets and new asset will be created in Tek Managed Assets.

Attachments

The attachments area allows users to add multiple attachments to the selected asset. Users may have the ability to add, edit or delete the attachments based upon their rights.


Asset Service History

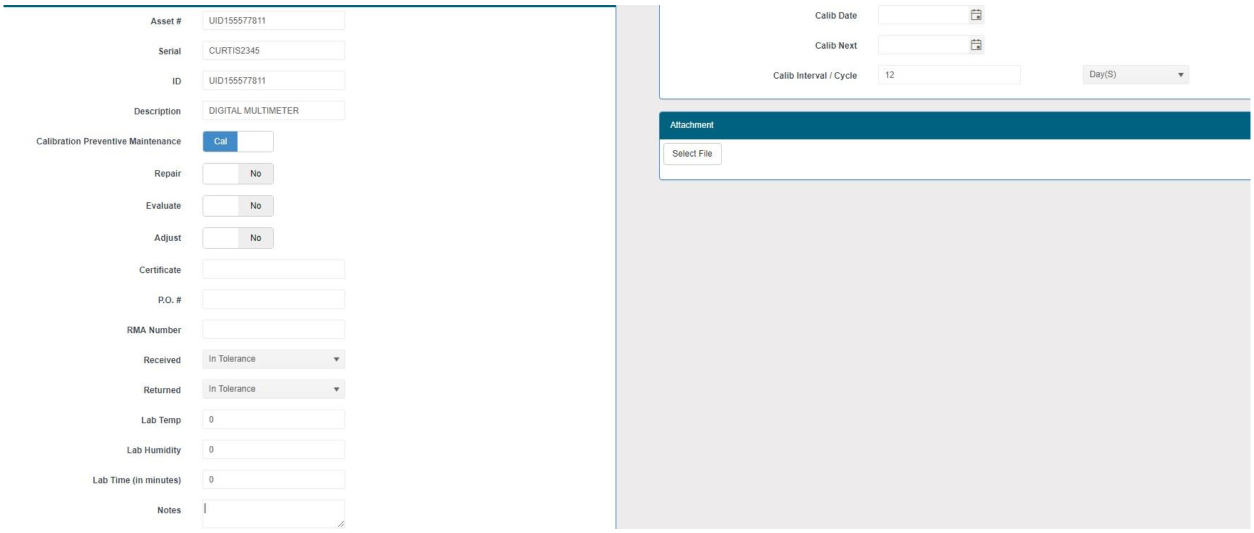
Add

Actions	Service Date	Service Next	Calibration	PM Service	Repair	Evaluate	Adjust	Cert No	P.O. #	RMA Number	Received	Returned	Lab Temp	Lab Humidity	Cal Cycle	Cycle	PM Cycle	Notes	Attached File
	09/07/2017	09/07/2017	false	true	false	false	false		123		In Tolerance	In Tolerance	0	0	0		0		12758876.pdf
	09/07/2017	09/07/2017	false	true	false	false	false		12345		In Tolerance	In Tolerance	0	0	0		0		
	09/07/2017	11/07/2017	true	false	true	false	false		12345		In Tolerance	In Tolerance	0	0	2	M	0		
	01/01/1900	01/01/1900	true	false	false	false	false				In Tolerance	In Tolerance	0	0	0	M	0	test	

LESS

Asset Service History

The Asset Service History provides customers a way to manage the service history of their assets. Users can add Service Events such as calibrations and PMs by clicking on the Add button in the Asset Service History title bar. Clicking on the Pencil icon allows users to edit the service event. Users may also delete the asset by clicking on the Delete icon.



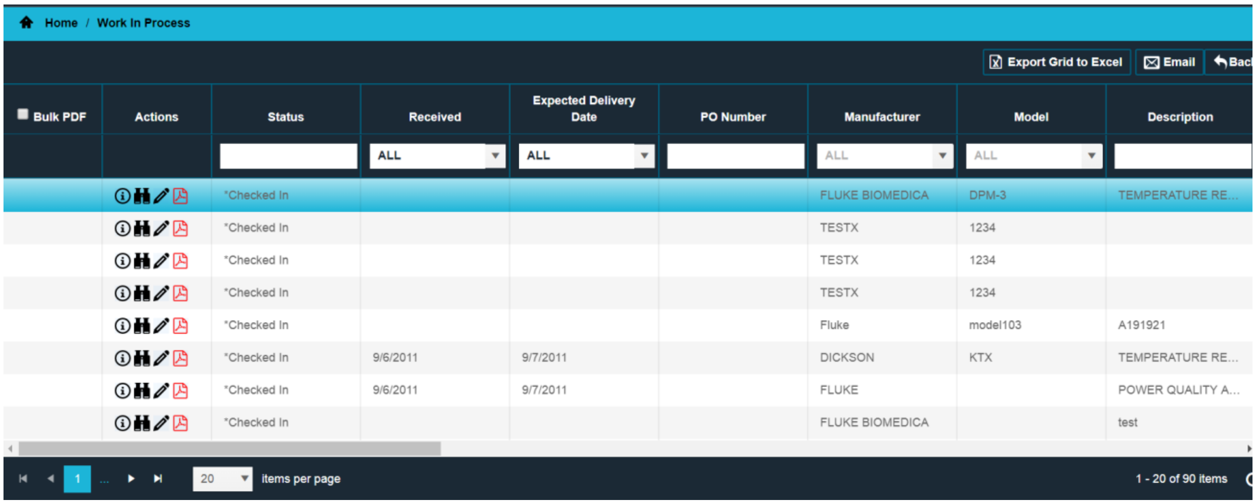
CMA Service Event

A CMA Service Event can be created by clicking on the Add button in the CMA Asset Detail. The user can select Calibration or PM event and fill out the relevant information. After saving, the event will be displayed on the asset detail view.

Asset Edit Customer Managed Assets

The Asset Edit screen provides detailed information on a specific asset which can be edited by the user. In order to get to the asset edit view, go to the Customer Managed Assets view and click on the pencil icon in the 'Actions' column. The asset edit view is also accessible via the asset detail page by clicking on the Edit button. This view can be customized to show fields based on the customer's preference. Any changes made to an asset are stored in an audit log which is accessible via the asset detail page.

Work In Process



Work In Process

The Work in Process feature provides a list of all equipment currently being serviced at SSO. Status, technician notes (when applicable), and equipment movement through the calibration process are listed for each piece of equipment as it is being serviced at SSO. In order to access the Work In Process feature from the menu, click on the Work In Process tile on the 'Home' screen or click on the Work In Process tile in the 'Views' menu. The Work In Process view can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Sort the Work In Process

The Work In Process screen can be sorted by clicking on the column heading. For example, to sort by Model Number, click on "Model #" at the top of that column. The arrow indicates the direction of the sort.

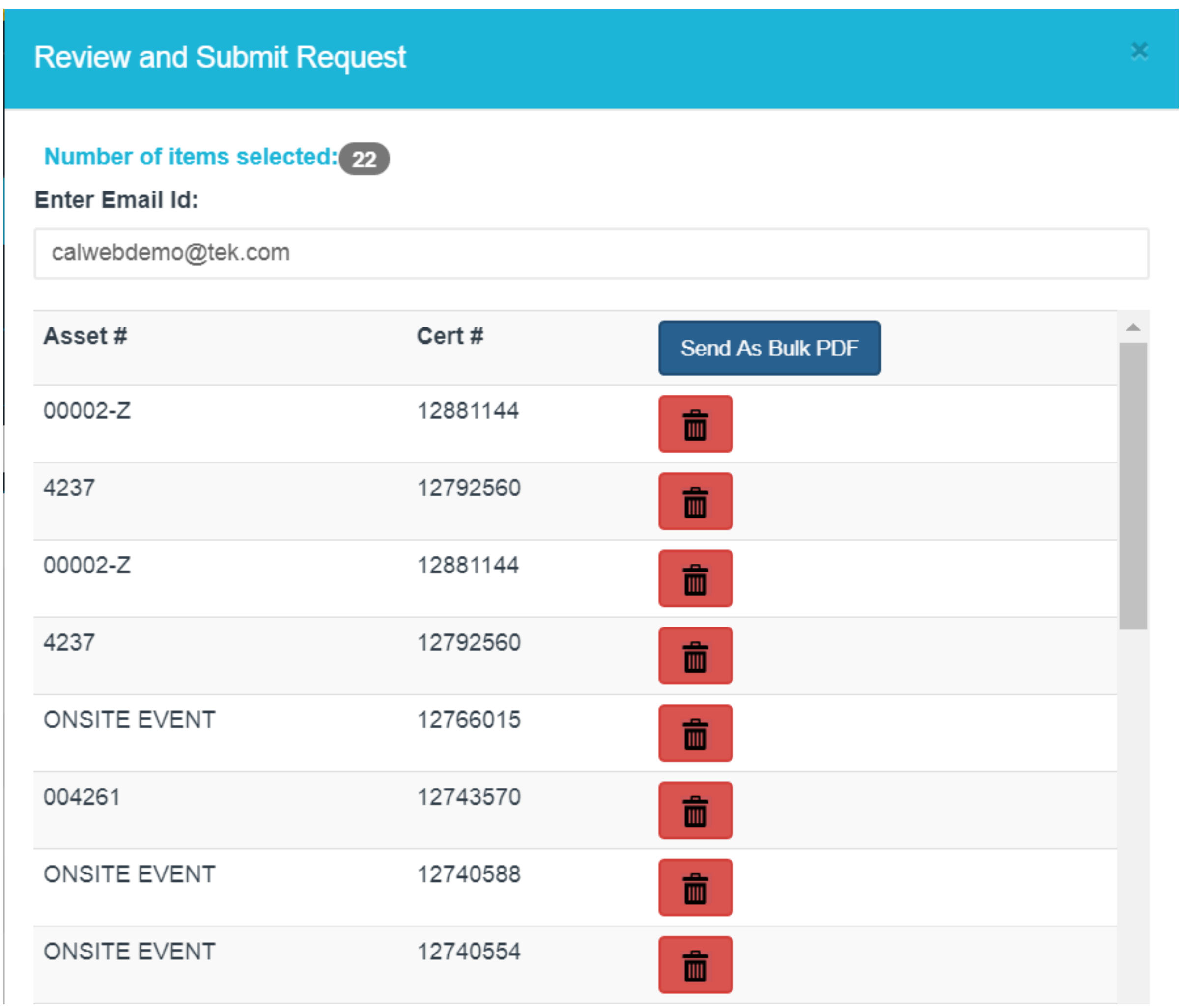
Filter the Work In Process

The Work In Process screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the "Manufacturer" column, select a manufacturer, and click on enter. CalWeb filters out all assets except the selected manufacturer's assets.

Text Entry: To filter using text entry, enter the criteria into the field's text box. For example, under the word “Model #”, type WD1 and click the enter button. All assets will be filtered out except assets with model # WD1.
To remove a filter, click the X in the filter box.

Bulk PDF

The Bulk PDF process provides the user the ability to send multiple certificates in an email at one time. To use this functionality, the user can check the check boxes next to the certificate or check the 'Select All' check box to select all of the certificates on the view. Once the certificates have been selected, the user should click on the shopping cart to review and submit the request. In this form, the user can remove certificates or change the email address to a different email. Once the request has been reviewed, the user can click on the Send as Bulk PDF button to submit the request. The list of certificates will then be emailed to the appropriate person. **Note**: This option is only available for items with a 'Shipped' status.



Request Info

Click on the information icon in the 'Actions' column to view the Request Info screen. This screen submits a form to Customer Care pertaining to the asset.

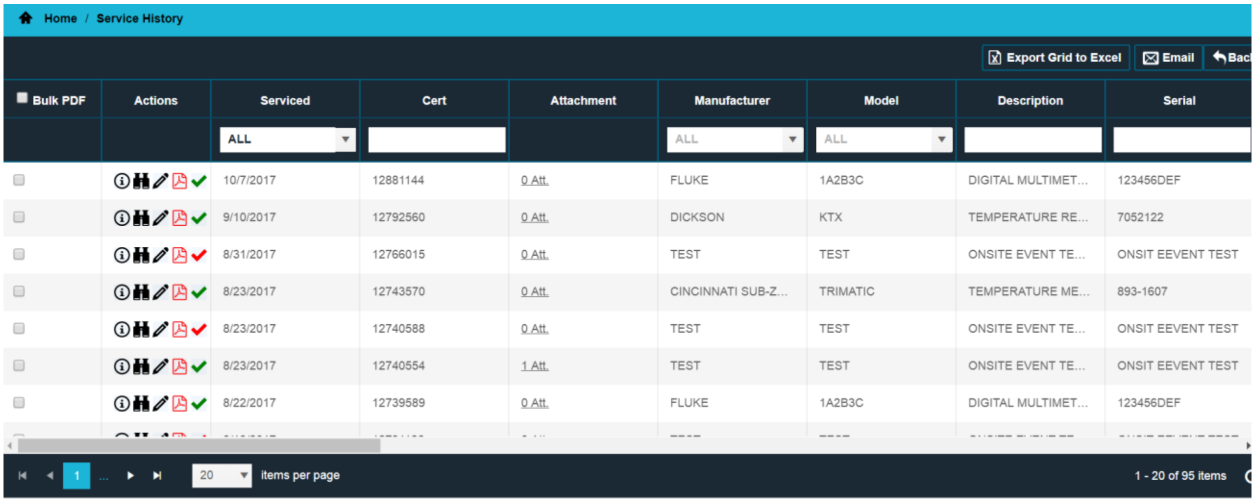
View Asset Detail

Click on the binocular icon in the 'Actions' column to view the asset detail. The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and invoices.

Edit Asset

Click on the pencil icon in the 'Actions' column to view the Asset Edit screen. The asset edit screen allows the user to make modifications to the asset.

Service History



Service History

The Service History feature provides a complete history of each asset calibrated and/or serviced by SSO. In order to access the Service History feature from the menu, click on the Service History tile on the 'Home' screen or click on the Service History tile in the 'Views' menu. The user can also view Calibration Certificates and access the Asset Detail Screen. The Service History can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Sort the Service History

The Service History screen can be sorted by clicking on the column heading. For example, to sort by Model Number, click on “Model #” at the top of that column. The arrow indicates the direction of the sort.

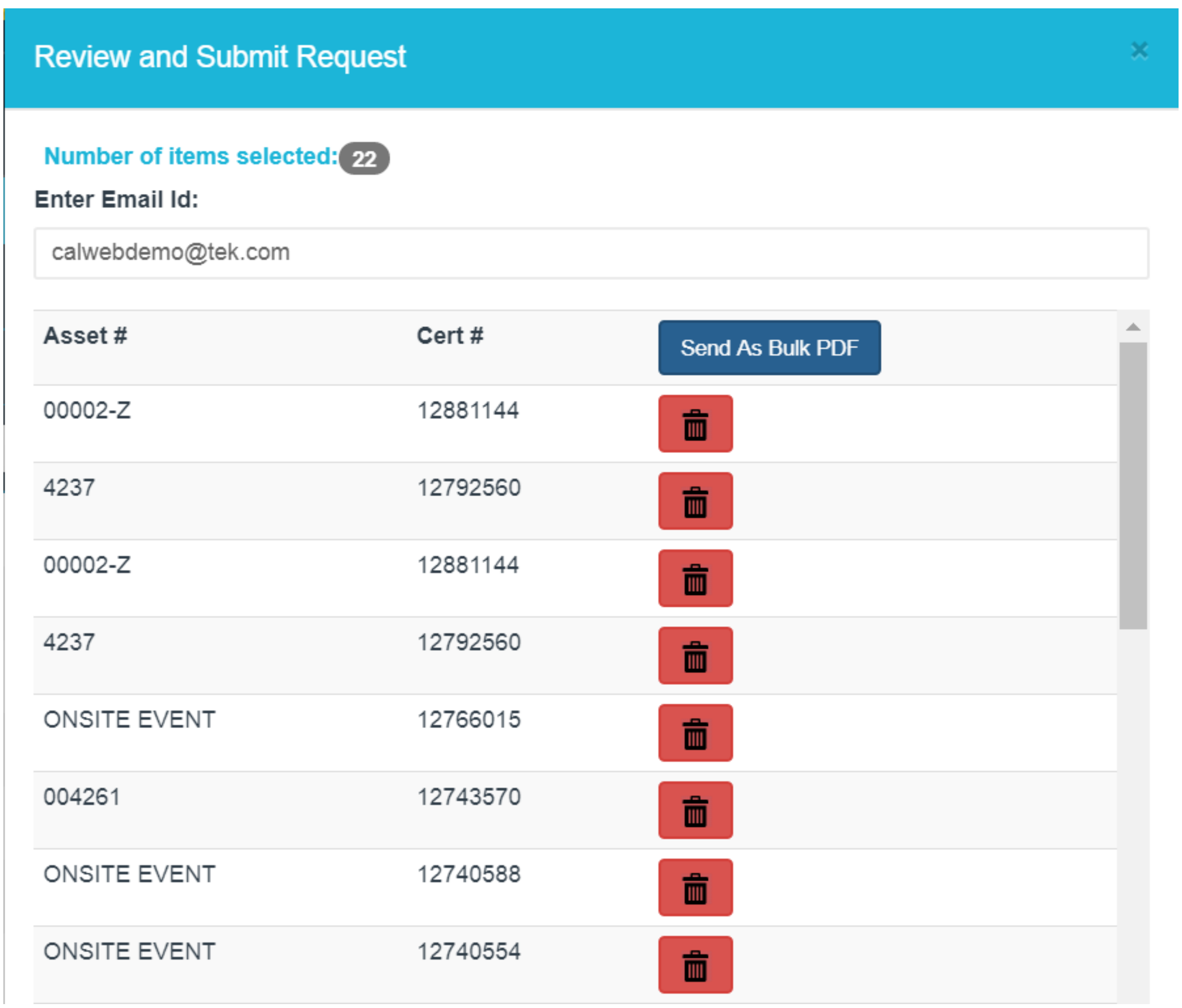
Filter the Service History

The Service History screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the “Manufacturer” column, select a manufacturer, and click on enter. CalWeb filters out all assets except the selected manufacturer’s assets.

Text Entry: To filter using text entry, enter the criteria into the field's text box. For example, under the word “Model #”, type WD1 and click the enter button. All assets will be filtered out except assets with model # WD1.
To remove a filter, click the X in the filter box.

Bulk PDF

The Bulk PDF process provides the user the ability to send multiple certificates in an email at one time. To use this functionality, the user can check the check boxes next to the certificate or check the 'Select All' check box to select all of the certificates on the view. Once the certificates have been selected, the user should click on the shopping cart to review and submit the request. In this form, the user can remove certificates or change the email address to a different email. Once the request has been reviewed, the user can click on the Send as Bulk PDF button to submit the request. The list of certificates will then be emailed to the appropriate person.



Request Info

Click on the information icon in the 'Actions' column to view the Request Info screen. This screen submits a form to Customer Care pertaining to the asset.

View Asset Detail

Click on the binocular icon in the 'Actions' column to view the asset detail. The Asset Detail screen provides detailed information and history on a specific asset, including previous Calibration Certificates and invoices.

Edit Asset

Click on the pencil icon in the 'Actions' column to view the Asset Edit screen. The asset edit screen allows the user to make modifications to the asset.

View Calibration Certificates

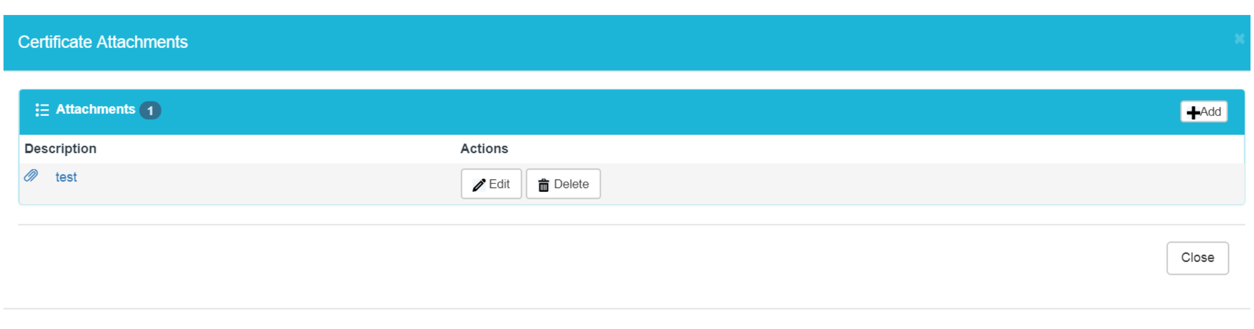
Point and click on the pdf icon in the 'Actions' column to view the current Calibration Certificate for a specific asset. The Calibration Certificate will open in an Adobe Reader (PDF) form. The certificate can be viewed, printed, or saved.

Service History/OOT Approval Form

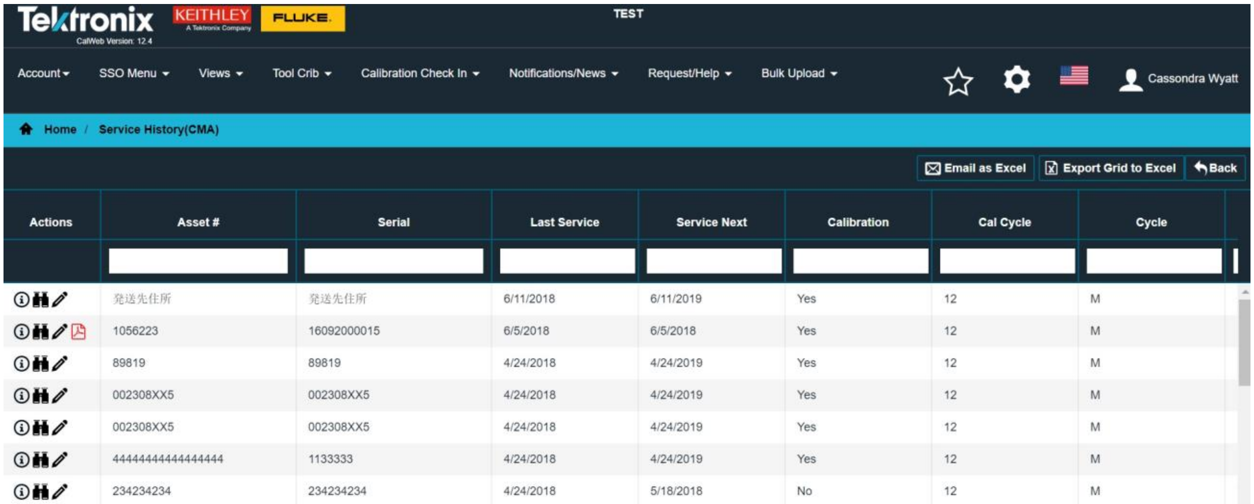
If the customer has the Service History/OOT Approval process enabled, the user can click on the Check mark icon to go to the approval form. Red indicates that the form is still in the 'Needs Approval' status, while a green color indicates the form has been approved or the service event did not need approval.

Certificate Attachments

Click on the attachment link in the Attachment column to add, edit or delete an attachment for the certificate. Multiple attachments can be added for one certificate.



Service History (CMA)



Service History

The Service History feature provides a history of each Customer Managed Asset calibration or preventive maintenane. In order to access the Service History feature from the menu, click on the Service History(CMA) tile on the 'Home' screen or click on the Service History(CMA) tile in the 'Views' menu. The user can also view Certificates and access the Asset Detail Screen from the Actions column. The Service History can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Sort the Service History

The Service History screen can be sorted by clicking on the column heading. For example, to sort by Model Number, click on “Model #” at the top of that column. The arrow indicates the direction of the sort.

Filter the Service History

The Service History screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the “Manufacturer” column, select a manufacturer, and click on enter. CalWeb filters out all assets except the selected manufacturer’s assets.

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To remove a filter, click the X in the filter box.

Request Info

Click on the information icon in the 'Actions' column to view the Request Info screen. This screen submits a form to Customer Care pertaining to the asset.

View Asset Detail

Click on the binocular icon in the 'Actions' column to view the asset detail. The Asset Detail screen provides detailed information and history on a specific asset.

Edit Asset

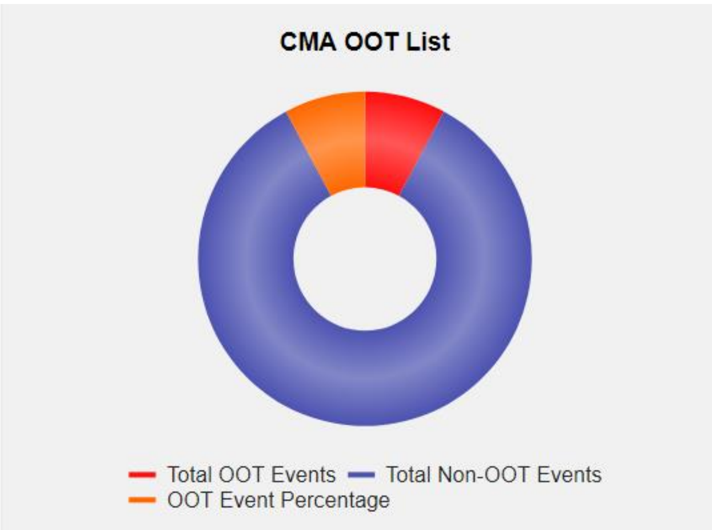
Click on the pencil icon in the 'Actions' column to view the Asset Edit screen. The asset edit screen allows the user to make modifications to the asset.

View Calibration Certificates

Point and click on the pdf icon in the 'Actions' column to view the current Calibration Certificate for a specific asset. The Calibration Certificate will open in an Adobe Reader (PDF) form. The certificate can be viewed, printed, or saved.

CMA OOT Case Management

The CMA OOT Case Management process provides a way for customers to track their Out of Tolerance assets. There are three main components to this feature: Dashboard, Service History, and the Approval Form.



Total Service Events	94
Total OOT Events	8
Closed	0
Open	8
Overdue	5
Total Non-OOT Events	86
OOT Event Percentage	8.51%

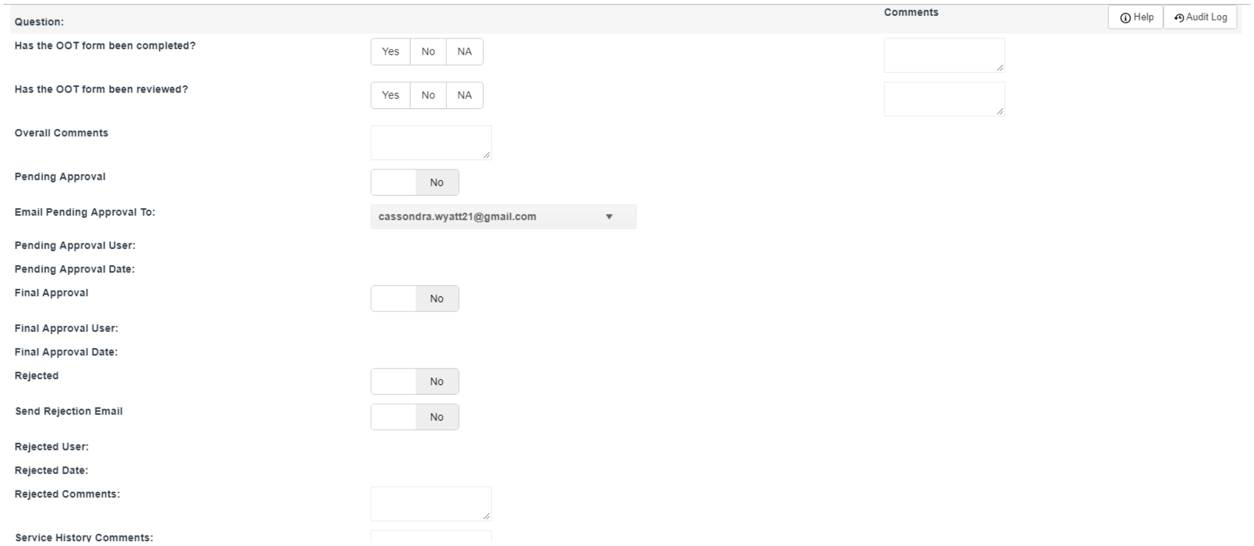
Dashboard

- Shows all Service events including OOT Events
    - Open
    - Closed
    - Overdue
- These events are hyperlinked to take you to the specific report containing these events

Actions	Calibration	Preventive Maintanace	Approval Status
	Yes	No	Needs Approval
	No	No	Needs Approval
	Yes	No	Needs Approval
	No	No	Needs Approval
	No	No	Needs Approval
	No	No	Needs Approval
	No	No	Needs Approval
	No	No	Needs Approval

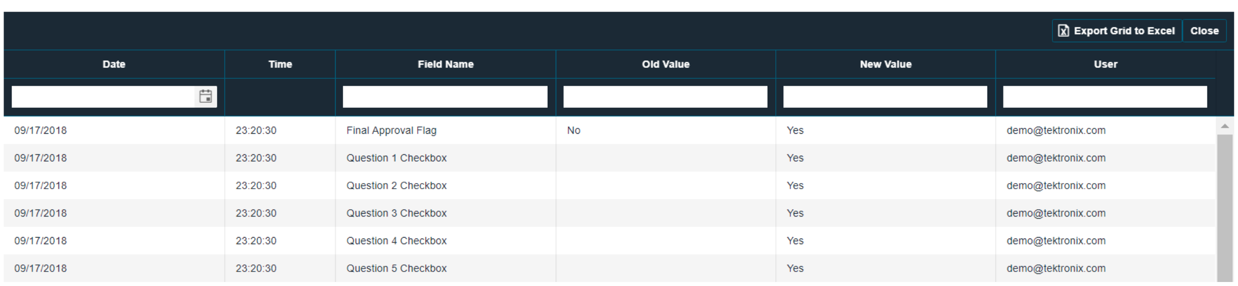
CMA Service History

- Shows a history of all events including OOTs. This screen allows you to filter on OOT statuses such as “Needs Approval", "Pending Approval", "Approved”, and Rejected
- Contains the link to the OOT Approval Form - the red checkmark in the Actions column
- The CMA Service History details who approved the form, the date, and comment (if necessary)



Approval Form

- Allows the customer to select 10 questions for the form
- The user determines which status to assign: pending approval, approval or rejected
- Click the Browse Button to optionally upload an OOT investigation or customer based documentation
- After the form is approved the dashboard will be updated

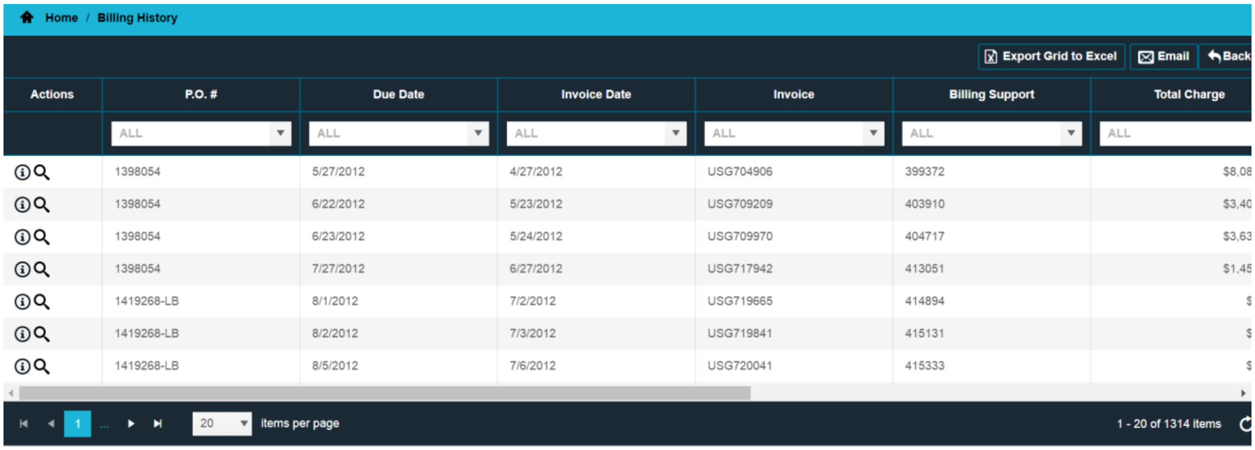

Export Grid to Excel | Close

Date	Time	Field Name	Old Value	New Value	User
09/17/2018	23:20:30	Final Approval Flag	No	Yes	demo@tektronix.com
09/17/2018	23:20:30	Question 1 Checkbox		Yes	demo@tektronix.com
09/17/2018	23:20:30	Question 2 Checkbox		Yes	demo@tektronix.com
09/17/2018	23:20:30	Question 3 Checkbox		Yes	demo@tektronix.com
09/17/2018	23:20:30	Question 4 Checkbox		Yes	demo@tektronix.com
09/17/2018	23:20:30	Question 5 Checkbox		Yes	demo@tektronix.com

Audit Trail

- Captures changes to the OOT Approval Form
- Is searchable and filterable
- Can be exported to excel

Billing History



The Billing feature provides current as well as historical invoicing information. In order to access the Billing History feature from the menu, click on the Billing History tile on the 'Home' screen or click on the Billing History tile in the 'Views' menu. The Billing screen initially displays a list of all open invoices. The contents/details of an invoice can be viewed by clicking on the Magnifying glass icon in the 'Actions' column. The Billing History can be sorted or filtered by specific criteria to create custom views which can be exported to Microsoft Excel or emailed as an .xlsx or .csv file.

Sort the Billing History

The Billing History screen can be sorted by clicking on the column heading. For example, to sort by Invoice Number, click on 'Invoice' at the top of that column. The arrow indicates the direction of the sort.

Filter the Billing History

The Billing History screen allows the user to filter the assets using several filter options:
Drop-down: To filter using the drop-down, select an item from the list and click enter. For example: click the drop-down menu in the 'Invoice' column, select an invoice number, and click on enter. CalWeb filters out all invoices except the selected invoice.
Text Entry: To filter using text entry, enter the criteria into the field's text box. For example, under the word 'Invoice', type 100143 and click the enter button. All invoices will be filtered out except invoices with invoice # 100143.
To remove a filter, click the X in the filter box.

Customer Service

Click on the information icon in the 'Actions' column to go to the Customer Service screen.

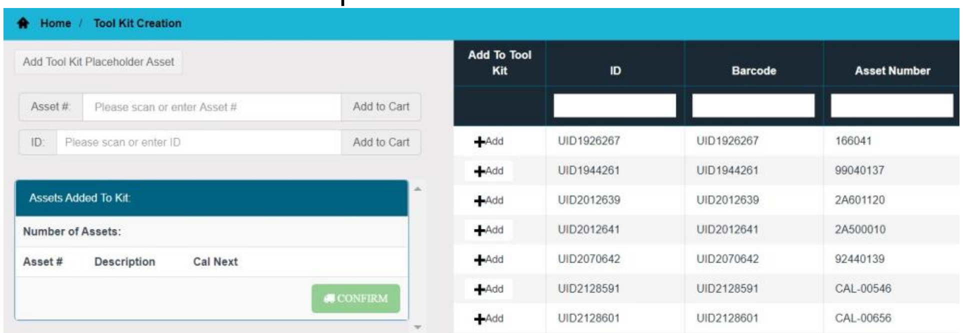
View Invoice

Click on the Magnifying glass icon in the 'Actions' column to view the Invoice.

Tool Kit Creation

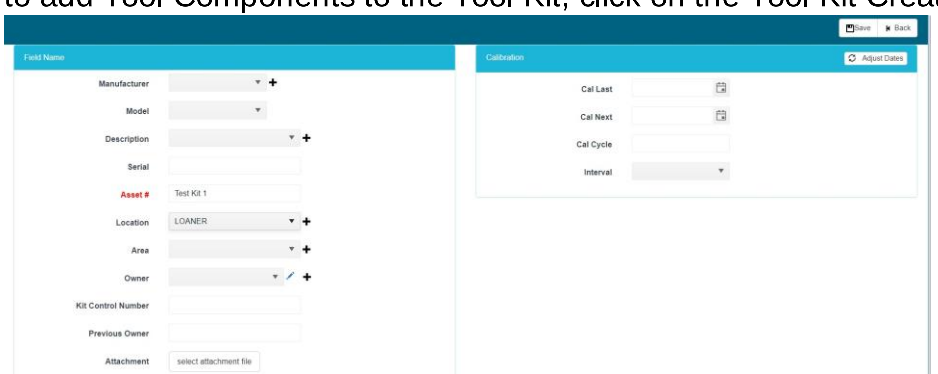
Tool Kits are created by assigning Tool Kit Components to a Tool Kit Placeholder Asset. Once the Tool Kit has been created, it will be available in the Loaner Program.

In order to create the Tool Kit Placeholder Asset, click on the Add Tool Kit Placeholder Asset button. This will open a new window with the Add Asset functionality.



Create the Tool Kit Placeholder Asset

The form for the Tool Kit Placeholder Assets will provide a means for the user to create an Tool Kit Placeholder Asset. The location should be set to 'Loaner'. After the asset has been created, the asset will show up in the Tek Managed Assets window. In order to add Tool Components to the Tool Kit, click on the Tool Kit Creation Tab.



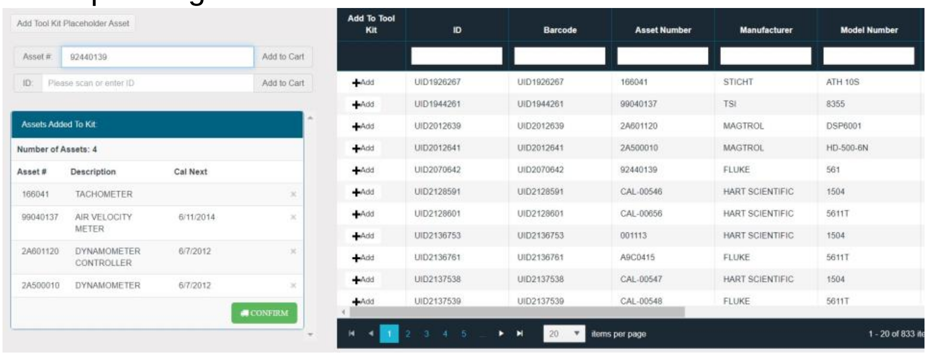
Add the Components to the Tool Kit

The tools can be added to the shopping cart in one of three ways:

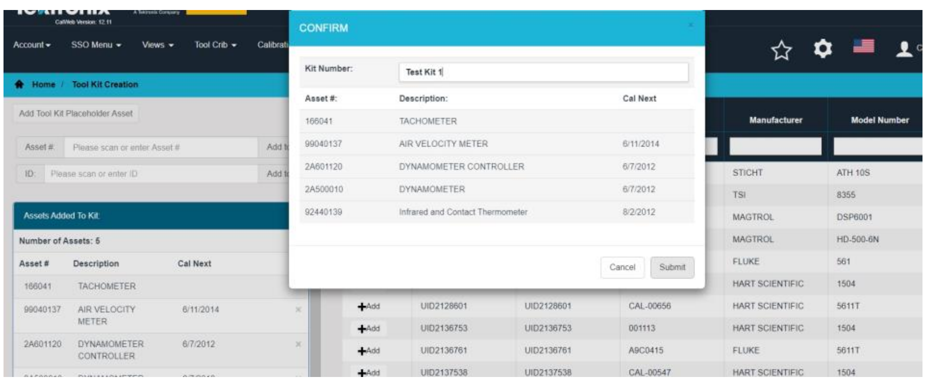
- Filling in the Asset Number and clicking Add to Cart

- Filling in the ID and clicking Add to Cart
- Clicking on the Add button in the list of assets

Assets can be removed from the shopping cart by clicking on the X next to the corresponding asset.

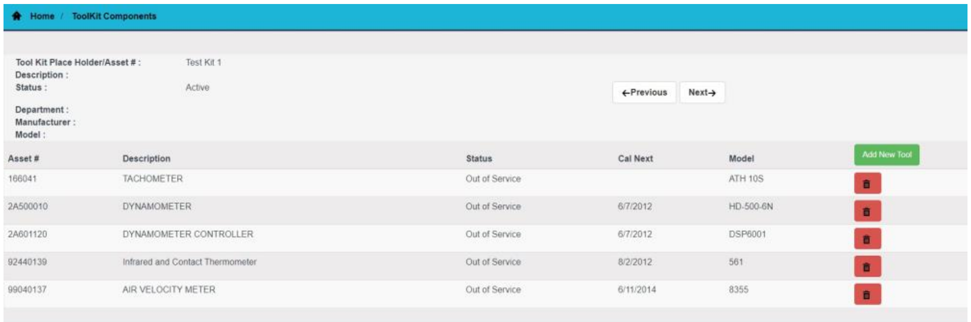


After you have selected all of your assets, click on the Confirm button to view your current Tool Kit components and add the Tool Kit Control Number. This is the number of the Tool Kit Placeholder Asset.



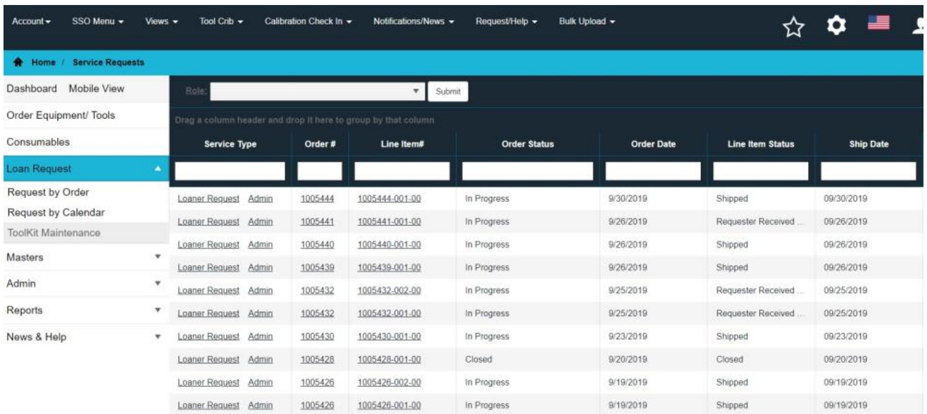
After this has been completed, the new Tool Kit can be viewed in the Tool Kit Components screen.

Click on the Tool Component button to view the Tool Kit detail.


Home / ToolKit Components
Tool Kit Place Holder/Asset # : Test Kit 1
Description :
Status : Active
←Previous
Next→
Department :
Manufacturer :
Model :
Asset # Description Status Cal Next Model
Add New Tool
166041 TACHOMETER Out of Service ATH 10S
2A500010 DYNAMOMETER Out of Service 6/7/2012 HD-500-6N
2A601120 DYNAMOMETER CONTROLLER Out of Service 6/7/2012 DSP6001
92440139 Infrared and Contact Thermometer Out of Service 8/2/2012 561
99040137 AIR VELOCITY METER Out of Service 6/11/2014 8355

Tool Kit Maintenance

The Tool Kit Maintenance Feature provides a way for users to Create and Maintain Tool Kits in the Service Request (Loaner Pool) program. This feature can be found by clicking on Views >> Service Requests >> Loan Request >> ToolKit Maintenance.

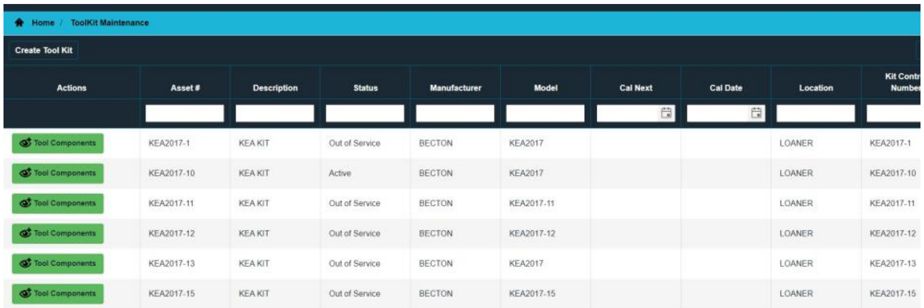


Tool Kit Maintenance List

The Tool Kit Maintenance List provides a list of all of the current Tool Kits for a specific customer. This list includes the following information about the Tool Components:

- Tool Component Button - links to a view of the Tool Kit and the components in the Tool Kit
- Asset Number - Asset Number of the Tool Kit that contains the tool
- Description - Description of the Tool Kit
- Status - Status of the Tool Kit
- Manufacturer - Manufacturer of the Tool Kit
- Model - Model Number of the Tool Kit
- Cal Next - Calibration Due Date of the Tool Kit
- Cal Date - Last Calibration Date of the Tool Kit
- Location - Location of the Tool Kit
- Kit Control Number - The Control Number of the Assets in the Tool Kit

Create Tool Kit - This button is a link to the Tool Kit Creation functionality.



Actions	Asset #	Description	Status	Manufacturer	Model	Cal Next	Cal Date	Location	Kit Contr Numbe
Tool Components	KEA2017-1	KEA KIT	Out of Service	BECTON	KEA2017			LOANER	KEA2017-1
Tool Components	KEA2017-10	KEA KIT	Active	BECTON	KEA2017			LOANER	KEA2017-10
Tool Components	KEA2017-11	KEA KIT	Out of Service	BECTON	KEA2017-11			LOANER	KEA2017-11
Tool Components	KEA2017-12	KEA KIT	Out of Service	BECTON	KEA2017-12			LOANER	KEA2017-12
Tool Components	KEA2017-13	KEA KIT	Out of Service	BECTON	KEA2017			LOANER	KEA2017-13
Tool Components	KEA2017-15	KEA KIT	Out of Service	BECTON	KEA2017-15			LOANER	KEA2017-15

ToolKit Components Detail

The ToolKit Components detail page provides the details of a specific ToolKit. The details include:

Tool Kit Details:

- Tool Kit Place Holder/Asset # - Asset number of the Tool Kit
- Description - Description of the Tool Kit
- Status - Active Status of the Tool Kit
- Department - Department of the Tool Kit
- Manufacturer - Manufacturer of the Tool Kit
- Model - Model Number of the Tool Kit

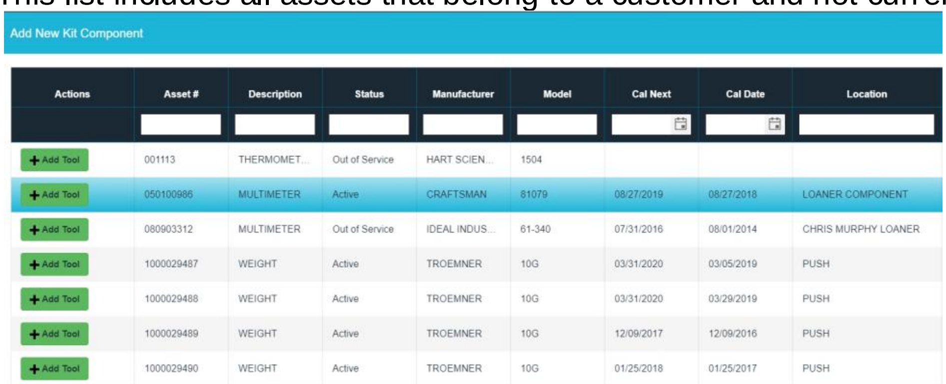
Previous Button - This button will display the next Tool Kit Components detail page
Next Button - This button will display the last Tool Kit Components detail page that was viewed

Tool Kit Component Details:

- Add New Tool Button - Provides a list from which to select a new tool for the Tool Kit
- Asset # - Asset number of each Tool Kit Component
- Description - Description of each Tool Kit Component
- Status - Active Status of each Tool Kit Component
- Cal Next - Calibration Due Date of each Tool Kit Component
- Model - Model Number of each Tool Kit Component
- Delete Tool Button - Removes the current tool from the Tool Kit

Add New Tool Kit Component to Tool Kit

In order to add a new Tool Kit Component to a Tool Kit, the user should click on the Add New Tool Button on the Tool Kit Components page. The Add New Kit Component view will then be displayed.
This list includes all assets that belong to a customer and not currently in a Tool Kit.

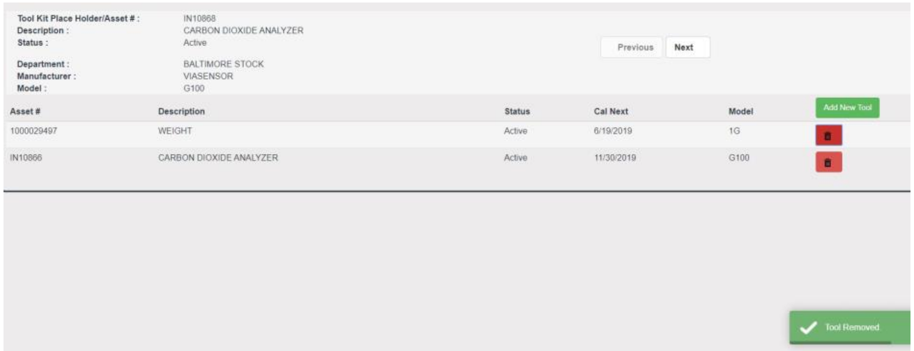


The user will click on the Add Tool button for the asset that is desired and the Tool Kit Component will be added to the current Tool Kit.
In the example below, you can see that two assets were added to this Tool Kit.

Removing Took Kit Component from a Tool Kit

To remove a Tool Kit component from a ToolKit, the user would click on the red button for that specific asset. The asset will then be removed from the Tool Kit and a message will be displayed showing the asset was successfully removed.

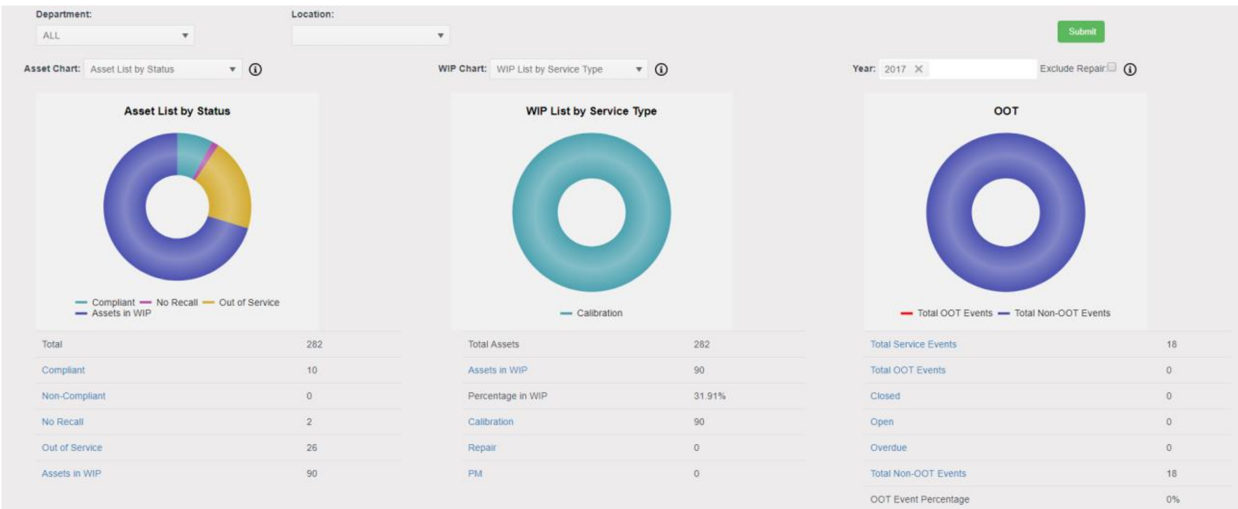
In the example below, the Multimeter was removed and the Tool Removed message displays in the bottom right corner.



Dashboard

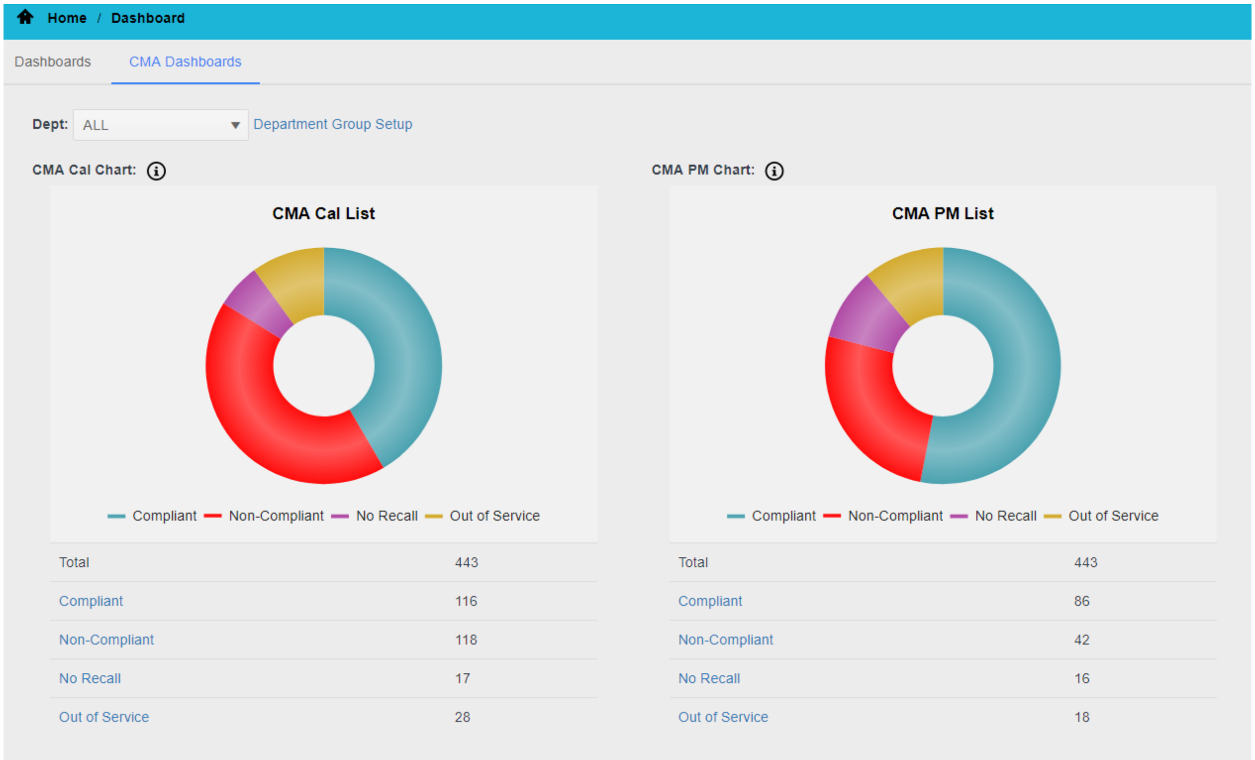
The Dashboard Screen allows a quick way for customers to view the status of their assets. Each chart contains hyperlinks that will allow the user to go to the desired area. For example, if a user clicks on the Assets in WIP link, it will take the user to a page that will show those assets currently in WIP. The dashboard can be filtered by department or customer specific department groups.

Dashboard - Tek Managed Assets



Asset Chart – The asset chart displays the number of assets belonging to a customer. It allows the user to see which items are compliant, Non-Compliant (overdue), No Recall, Out of Service and the Asset that are currently in Work In Process.
WIP Chart – This chart shows the number of assets belonging to a customer and the number that are currently in WIP. It also breaks down into categories such as Calibration, Repair and PM.
Service History Chart – This chart shows the total service events for the customer. It also shows the total OOT And Non-OOT events. The OOT events can be further broken down into the Closed, Open and Overdue Assets. These options are for customers that currently have the Service History Approval or OOT Approval Process.

Dashboard - Customer Managed Assets

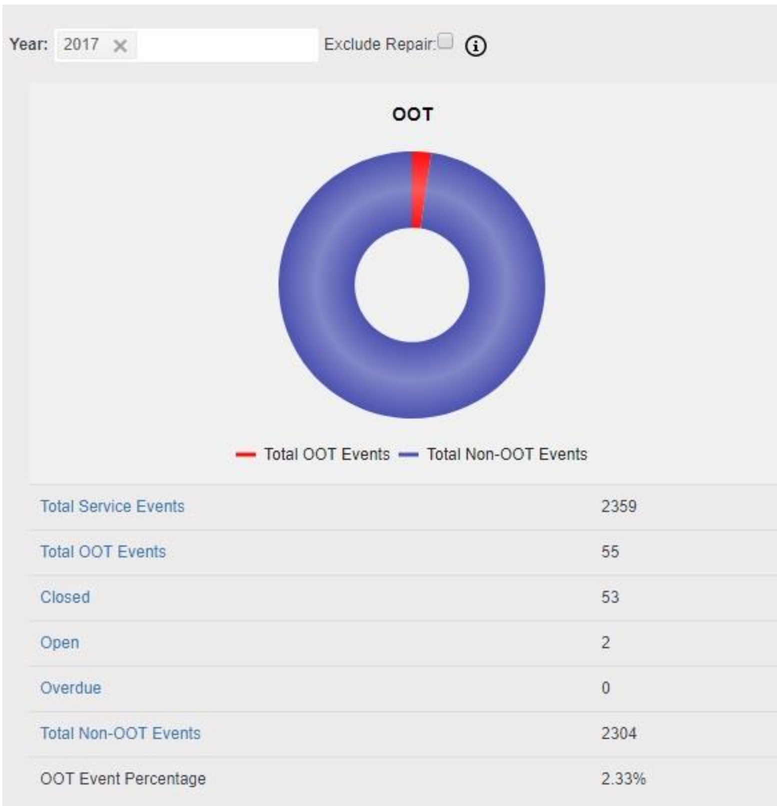


Customer Managed Assets Calibration Chart – This chart displays the current assets that are in the Customer Managed Assets and have calibration dates entered. This area shows the Compliant calibrations, Non-Compliant calibrations, No Recalls and Out of Service.

Customer Managed Assets Preventive Maintenance Chart - This chart displays the current assets that are in the Customer Managed Assets and have Preventive Maintenance dates entered. This area shows the Compliant PMs, Non-Compliant PMs, No Recalls and Out of Service.

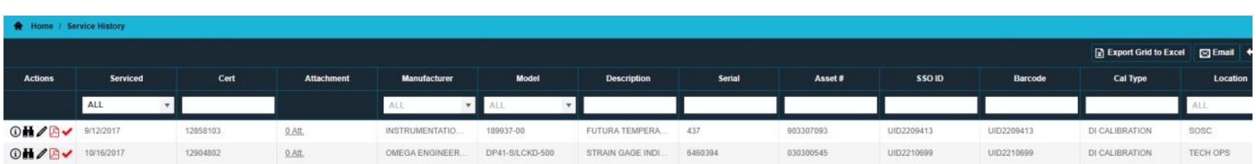
Service History/OOT Approval Process

The Service History/OOT Approval Process allows customers to track their Service Events/OOTs. There are three main components to this feature: Dashboard, Service History, and the Approval Form.



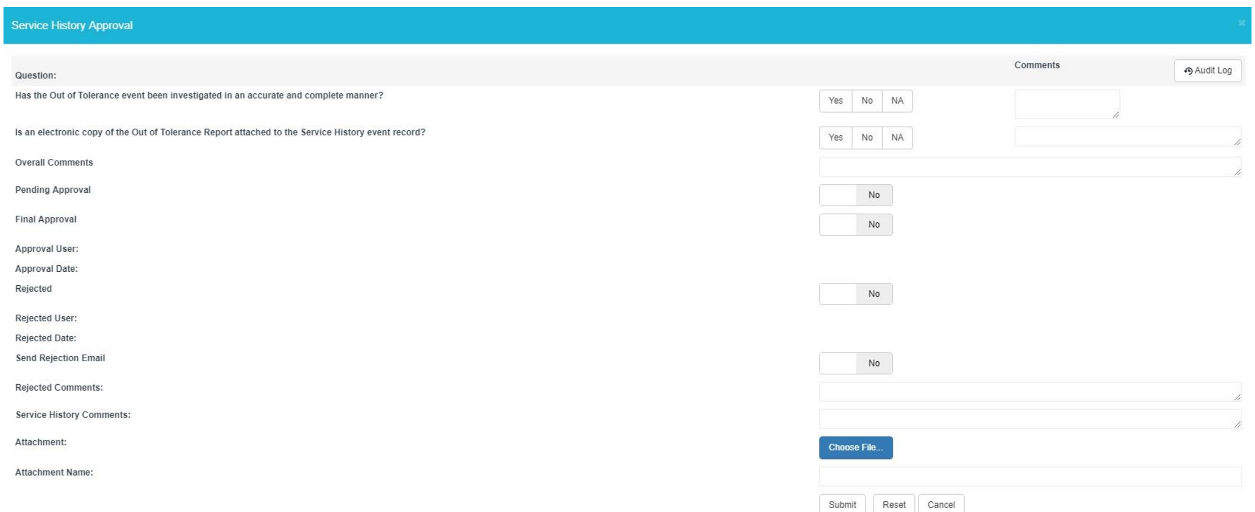
Dashboard

- Shows all Service events including OOT Events
  - Open
  - Closed
  - Overdue
- These events are hyperlinked to take you to the specific report containing these events



Service History

- Shows a history of all events including OOTs. This screen allows you to filter on OOT statuses such as “Needs Approval", "Pending Approval", "Approved”, and Rejected
- Contains the link to the OOT Approval Form - the red checkmark in the Actions column
- The Service History details who approved the form, the date, and comment (if necessary)

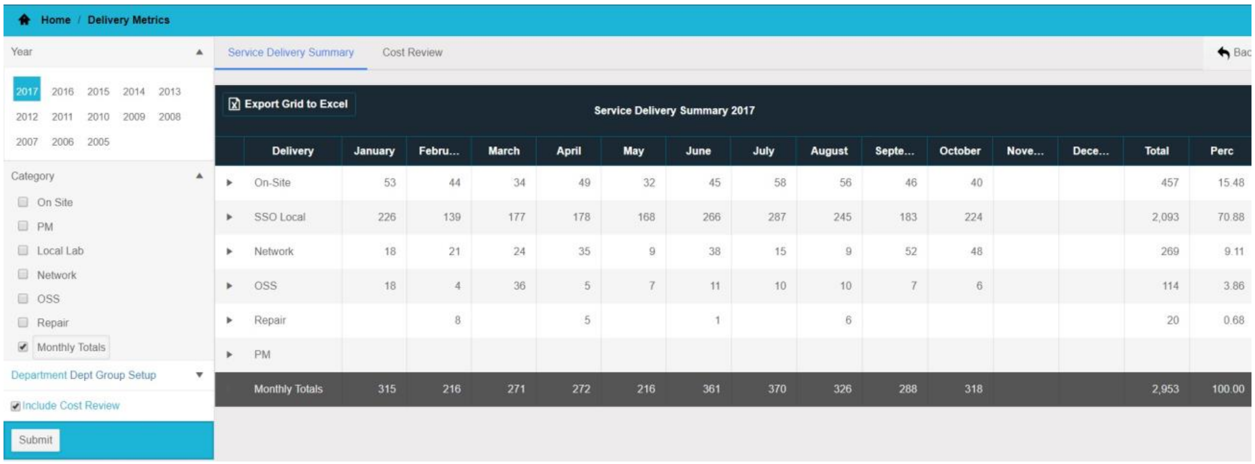


Approval Form

- Allows the customer to select 10 questions for the form
- The user determines which status to assign: pending approval, approval or rejected
- Click the Browse Button to optionally upload an OOT investigation or customer based documentation
- After the form is approved the dashboard will be updated

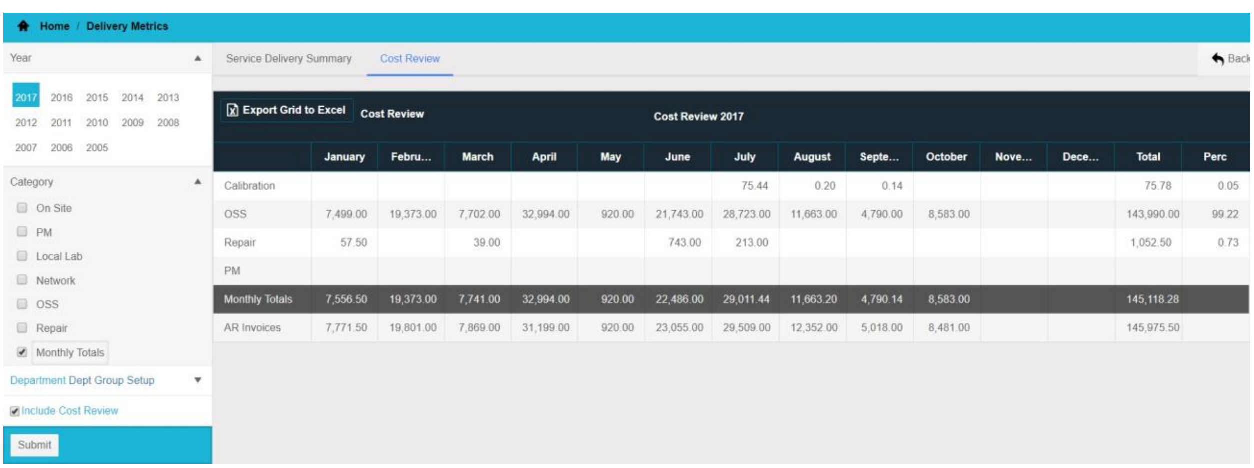
Delivery Metrics

In order to access the Delivery Metrics feature from the menu, click on the Delivery Metrics tile on the 'Home' screen or click on the Delivery Metrics tile in the 'Views' menu.



Delivery Metrics Unit Display

This screen shows the number of units each month per service type. You can change the year and the category using the selection options on the left. To see the turnaround times for each service type, click on the category name. The summary can be exported to excel. To view the Cost Review, click on the Include Cost Review check box and the Cost Review tab will be displayed.



The cost review shows a breakdown of costs by service type for each month. The cost review can be exported to excel.

Export Grid to Excel

Service Efficiency 2017

Month	# Instruments	Avg T-Time	# Items Within 5 Days	# Items Not Within 5 Days	% Items Meeting Commitment
January	222	2.53	211	11	95.05
February	138	1.47	136	2	98.55
March	169	4.62	108	61	63.91
April	167	2.29	163	4	97.60
May	168	1.95	164	4	97.62
June	264	2.18	253	11	95.83
July	285	2.82	254	31	89.12
August	241	3.00	237	4	98.34
September	177	2.01	169	8	95.48
October	203	3.46	162	41	79.80
November					
December					
YTD	2,034	2.66	1,857	177	91.30

Delivery Metrics Summary Page

This screen shows the number of units serviced as well as the average turnaround time and items meeting commitment time. It also show the items not meeting commitment time and the on time percentage. This information can be exported to excel. Double-click on the month to view a breakdown of assets.

Export Grid to Excel

Efficiency Breakdown Summary 2017

Cert #	Manufactu...	Model #	Description	Serial #	Instrument ID	Asset # #	SSO ID	Cal Type	Location	Department	Received	Returned	Receiv Date
12381918	MOUNTZ	EMT80	TORQUE S...	6JH026374	UID2133208	906602749	UID2133208	Calibration		0110000	LIMITED	LIMITED	04/20/20
12382160	MID-WEST...	845	BACKFLO...	03092756	UID2133006	906602682	UID2133006	Calibration		0650000	IN TOLER...	IN TOLER...	04/27/20
12382005	ASG	ASG-P15	TORQUE ...	1104900120	UID2133136	906601156	UID2133136	Calibration		0110000	LIMITED	LIMITED	04/20/20
12386855	INTERNATI...	HEPA	FILTER UNIT		UID2131898	906602019	UID2131898	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386840			CLEANRO...	5020875	UID2131903	906602043	UID2131903	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386746	CLEAN AI...	CAP 109	HEPA FILT...		UID2131923	906602474	UID2131923	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12388816	GILSON	P-200	PIPETTE	K20082B	UID2132623	906602263	UID2132623	Calibration		0420000	IN TOLER...	IN TOLER...	05/02/20
12386804	CLEAN AI...	CAP112-42...	FILTER W/...		UID2131924	906602475	UID2131924	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386795	CLEAN AI...	CAP112-42...	FILTER W/...		UID2131925	906602476	UID2131925	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12388661	EPPENDO...	REPEATE...	REPEATE...	195602Z	UID2132662	906602865	UID2132662	Calibration		0420000	IN TOLER...	IN TOLER...	05/02/20

1 2 3 4 5 6 7 8 9 10 ...

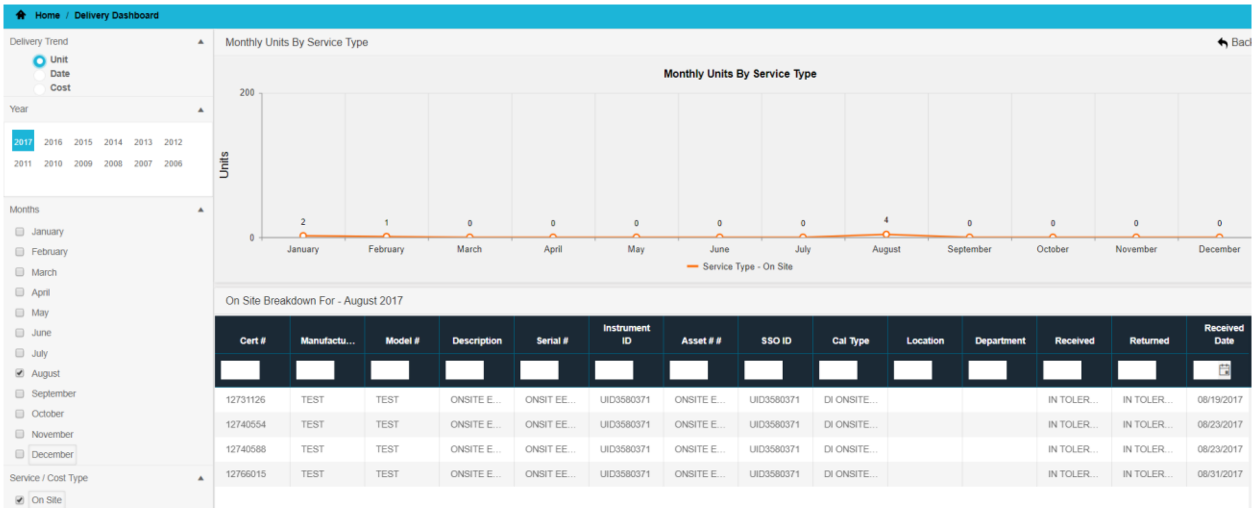
1 - 10 of 168 items

Delivery Metrics Service Breakdown

This screen shows the asset detail of the units serviced during the time selected. This information can be exported to excel

Delivery Dashboard

In order to access the Delivery Dashboard feature from the menu, click on the Delivery Dashboard tile on the 'Home' screen or click on the Delivery Dashboard tile in the 'Views' menu.



Units Graph

This screen shows the number of units each month per service type.

Units Grid

This screen shows the number of units each month per service type. The grid shows a breakdown of each asset and can be downloaded to excel.

Date Graph

This screen shows the percentage of units each month meeting the commitment time by service type.

Date Grid

This screen shows the percentage of units each month meeting the commitment time by service type. The grid shows a breakdown of each asset and can be downloaded to excel.

Cost Graph

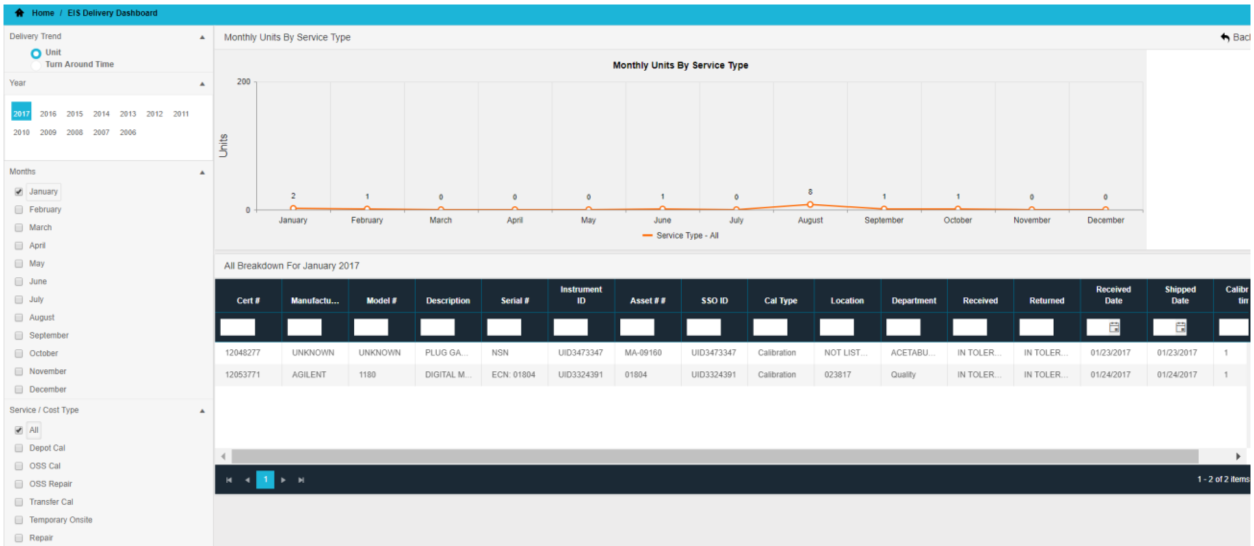
This screen shows the calibration costs each month.

Cost Grid

This screen shows the calibration costs each month. The grid shows a breakdown of each asset and can be downloaded to excel.

EIS Delivery Dashboard

In order to access the EIS Delivery Dashboard feature from the menu, click on the EIS Delivery Dashboard tile on the 'Home' screen or click on the EIS Delivery Dashboard tile in the 'Views' menu.



Units Graph

This screen shows the number of units each month per service type.

Units Grid

This screen shows the number of units each month per service type. The grid shows a breakdown of each asset and can be downloaded to excel.

Turn Around Time Graph

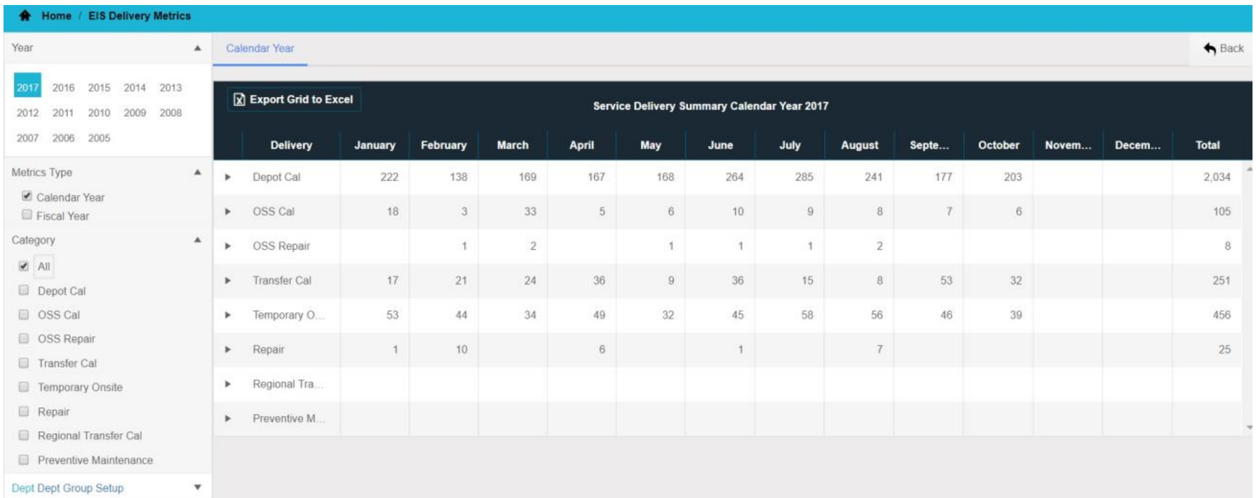
This screen shows the percentage of units each month meeting the commitment time by service type.

Turn Around Time Grid

This screen shows the percentage of units each month meeting the commitment time by service type. The grid shows a breakdown of each asset and can be downloaded to excel.

EIS Delivery Metrics

In order to access the EIS Delivery Metrics feature from the menu, click on the EIS Delivery Metrics tile on the 'Home' screen or click on the EIS Delivery Metrics tile in the 'Views' menu.



EIS Delivery Metrics Unit Display

This screen shows the number of units each month per service type. You can change the year and the category using the selection options on the left. To see the turnaround times for each service type, click on the category name. The summary can be exported to excel.

Export Grid to Excel

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December					
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EIS Delivery Metrics Summary Page

This screen shows the number of units serviced as well as the average turnaround time and items meeting commitment time. It also show the items not meeting commitment time and the on time percentage. This information can be exported to excel. Double-click on the month to view a breakdown of assets.

Export Grid to Excel

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12382160	MID-WEST...	845	BACKFLO...	03092756	UID2133006	906602682	UID2133006	Calibration		0650000	IN TOLER...	IN TOLER...	04/27/20
12382005	ASG	ASG-P15	TORQUE ...	1104900120	UID2133136	906601156	UID2133136	Calibration		0110000	LIMITED	LIMITED	04/20/20
12386855	INTERNATI...	HEPA	FILTER UNIT		UID2131898	906602019	UID2131898	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386840			CLEANRO...	5020875	UID2131903	906602043	UID2131903	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386746	CLEAN AI...	CAP 109	HEPA FILT...		UID2131923	906602474	UID2131923	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12388816	GILSON	P-200	PIPETTE	K20082B	UID2132623	906602263	UID2132623	Calibration		0420000	IN TOLER...	IN TOLER...	05/02/20
12386804	CLEAN AI...	CAP112-42...	FILTER W/...		UID2131924	906602475	UID2131924	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12386795	CLEAN AI...	CAP112-42...	FILTER W/...		UID2131925	906602476	UID2131925	Calibration		0130026	IN TOLER...	IN TOLER...	04/21/20
12388661	EPPENDO...	REPEATE...	REPEATE...	195602Z	UID2132662	906602865	UID2132662	Calibration		0420000	IN TOLER...	IN TOLER...	05/02/20

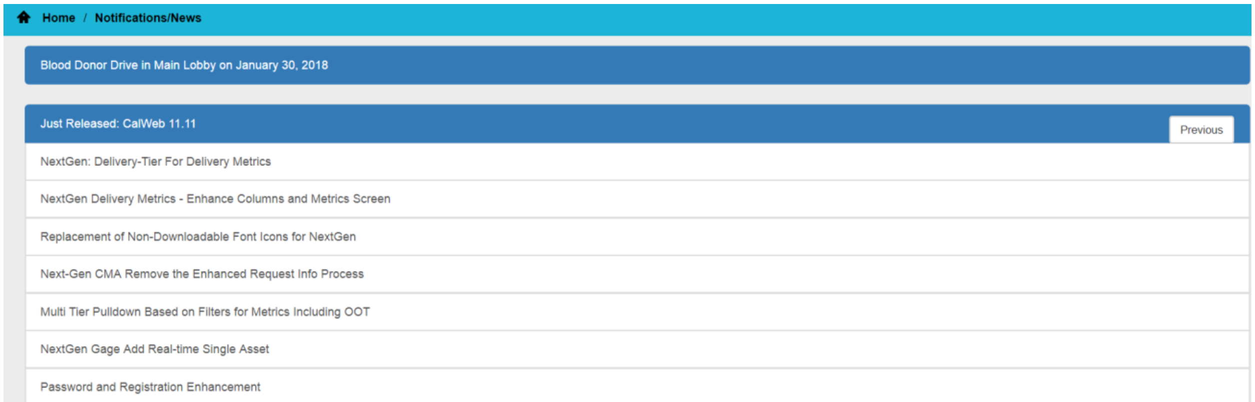
1 2 3 4 5 6 7 8 9 10 ...

1 - 10 of 168 items

EIS Delivery Metrics Service Breakdown

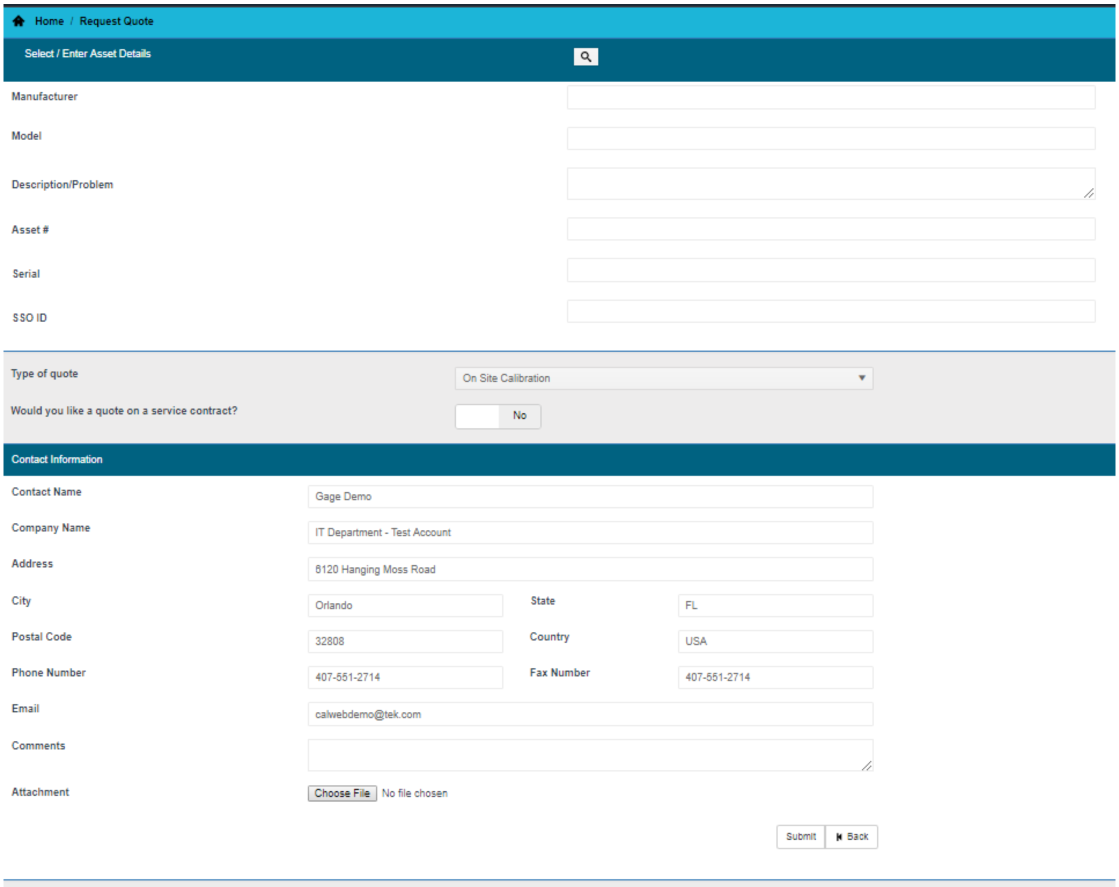
This screen shows the asset detail of the units serviced during the time selected. This information can be exported to excel

Notification/News



The Notification/News area displays the most recent CalWeb release items as well as any notifications customers would like to display to their users.

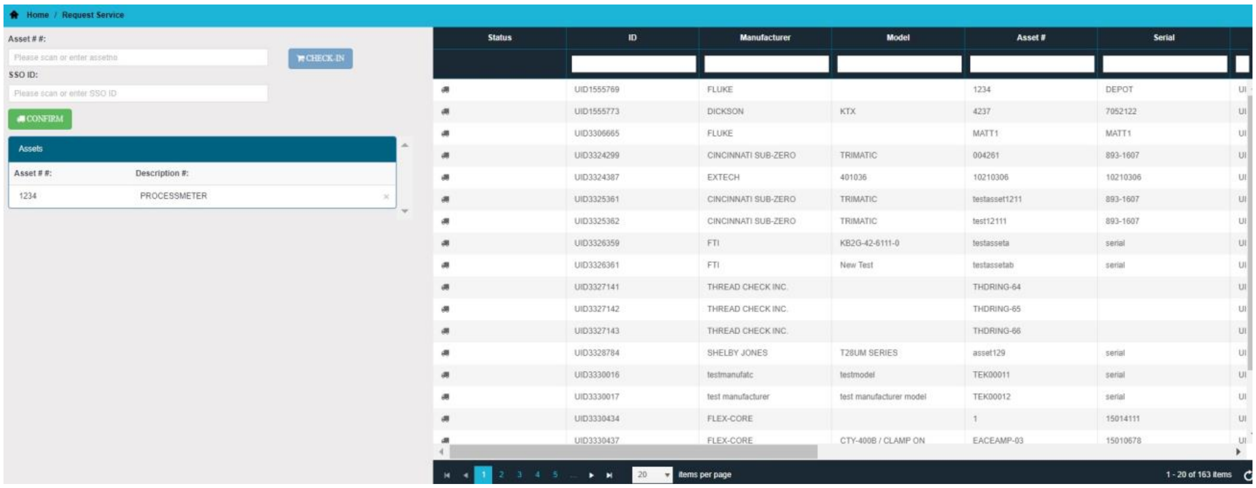
Request Quote



The Request Quote feature enables the user to request a calibration and/or repair quote by completing specific fields on the Request Quote screen. To access the Request Quote feature from the CalWeb menu, click on “Request/Help>>Request Quote”. Enter the equipment to be calibrated and/or repaired, contact information, and any comments. A document can also be attached, if desired. Click on the Submit button and the request will be emailed to SSO Customer Care.

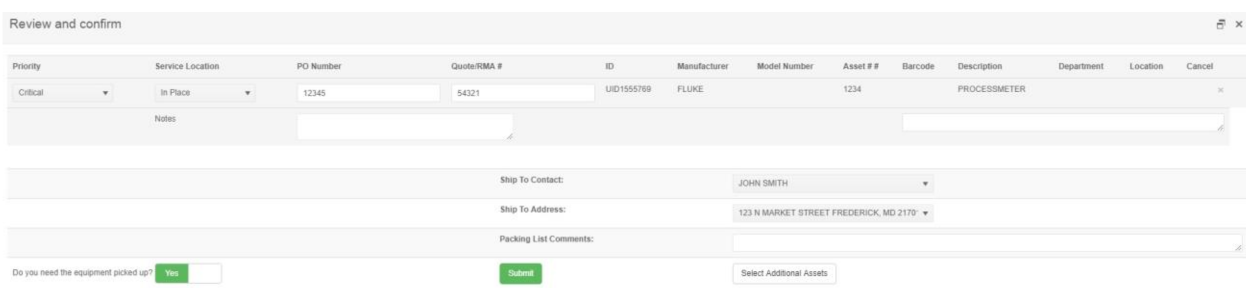
Request Service

The Request Service feature allows a user to select items to be serviced and create a packing slip. In order to access the Request Service feature from the menu, click on the Request Service tile on the 'Request/Help' menu.



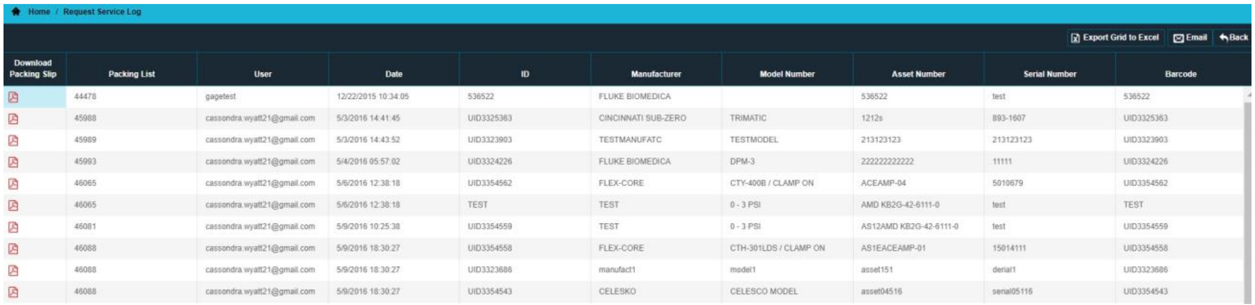
Asset Selection

The user can select the items to check in by scanning with a barcode or by clicking on the Add icon in the Status column.



Packing Slip

Once the items have been selected, the user can review the items in the confirmation page and Submit. A packing slip will then be generated and emailed to the user.



Home / Request Service Log

Export Grid to Excel | Email | Back

Download Packing Slip	Packing List	User	Date	ID	Manufacturer	Model Number	Asset Number	Serial Number	Barcode
	44478	gagetest	12/22/2015 10:34:05	536522	FLUKE BIOMEDICA		536522	test	536522
	45988	cassondra.wyatt21@gmail.com	5/3/2016 14:41:45	UID3325363	CINCINNATI SUB-ZERO	TRIMATIC	1212s	893-1607	UID3325363
	45989	cassondra.wyatt21@gmail.com	5/3/2016 14:43:52	UID3323903	TESTMANUFATC	TESTMODEL	213123123	213123123	UID3323903
	45993	cassondra.wyatt21@gmail.com	5/4/2016 05:57:02	UID3324226	FLUKE BIOMEDICA	DPM-3	222222222222	11111	UID3324226
	46065	cassondra.wyatt21@gmail.com	5/6/2016 12:38:18	UID3354562	FLEX-CORE	CTY-400B / CLAMP ON	ACEAMP-04	5010679	UID3354562
	46065	cassondra.wyatt21@gmail.com	5/6/2016 12:38:18	TEST	TEST	0 - 3 PSI	AMD KB2G-42-6111-0	test	TEST
	46081	cassondra.wyatt21@gmail.com	5/9/2016 10:25:38	UID3354559	TEST	0 - 3 PSI	AS12AMD KB2G-42-6111-0	test	UID3354559
	46088	cassondra.wyatt21@gmail.com	5/9/2016 18:30:27	UID3354558	FLEX-CORE	CTH-301LDS / CLAMP ON	AS1EACEAMP-01	15014111	UID3354558
	46088	cassondra.wyatt21@gmail.com	5/9/2016 18:30:27	UID3323686	manufact1	model1	asset151	derial1	UID3323686
	46088	cassondra.wyatt21@gmail.com	5/9/2016 18:30:27	UID3354543	CELESKO	CELESCO MODEL	asset04516	serial05116	UID3354543

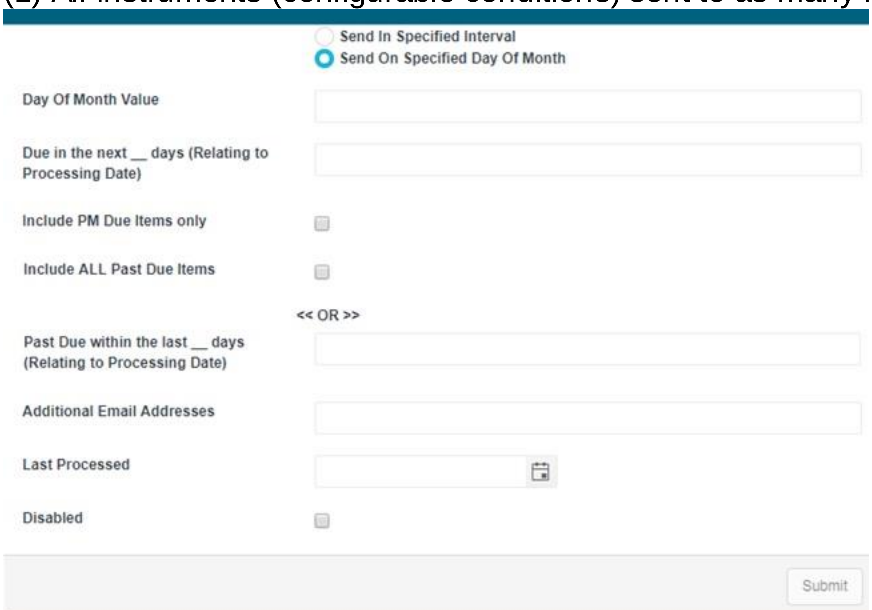
Request Service Log

The Request Service Log contains a list of all items that have been checked in by user. Users can download packing slips by clicking on the PDF icon in the Download Packing Slip column.

CMA Recall Notices

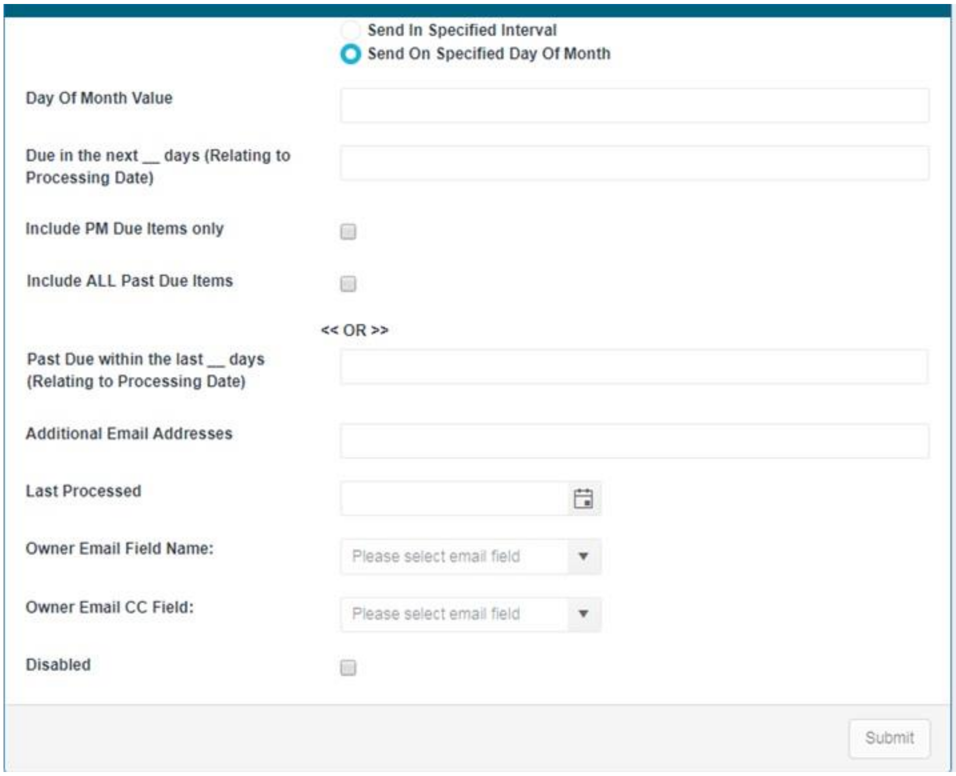
Calibration Service Due – Preventative Maintenance Due – Notifications

• Two types of notifications possible.
(1) All instruments (configurable conditions) sent to as many recipients as necessary



(2) All instruments (configurable conditions) sent to as many owners as found (email addresses)

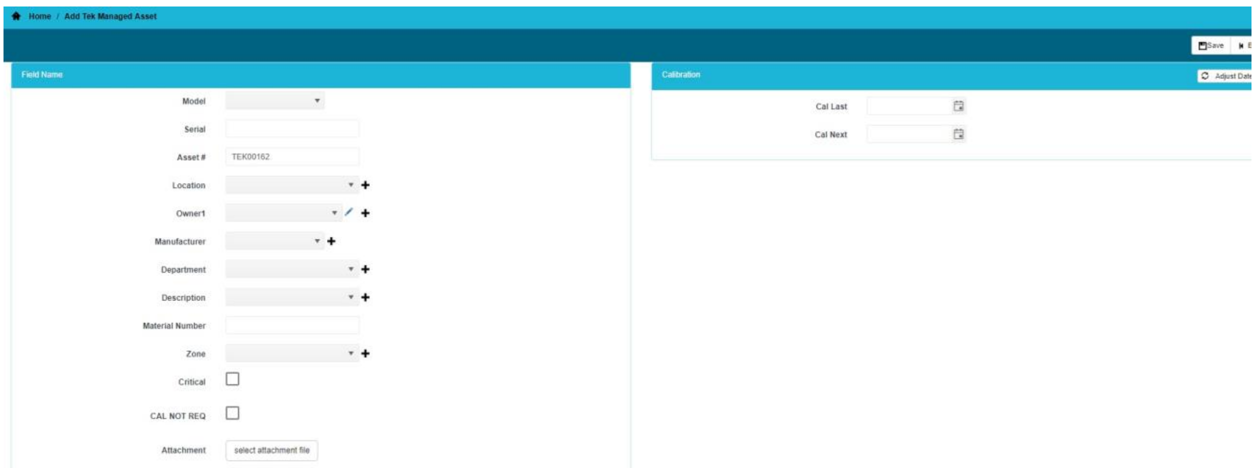
• Requirements
Owner Email Field name/email must be present and mapped.
Second Supervisor or Second responsible party/email can be sent (must be present and mapped)


Send In Specified Interval
Send On Specified Day Of Month
Day Of Month Value
Due in the next __ days (Relating to Processing Date)
Include PM Due Items only
Include ALL Past Due Items
<< OR >>
Past Due within the last __ days (Relating to Processing Date)
Additional Email Addresses
Last Processed
Owner Email Field Name:
Please select email field
Owner Email CC Field:
Please select email field
Disabled
Submit

Adding Tek Managed Assets

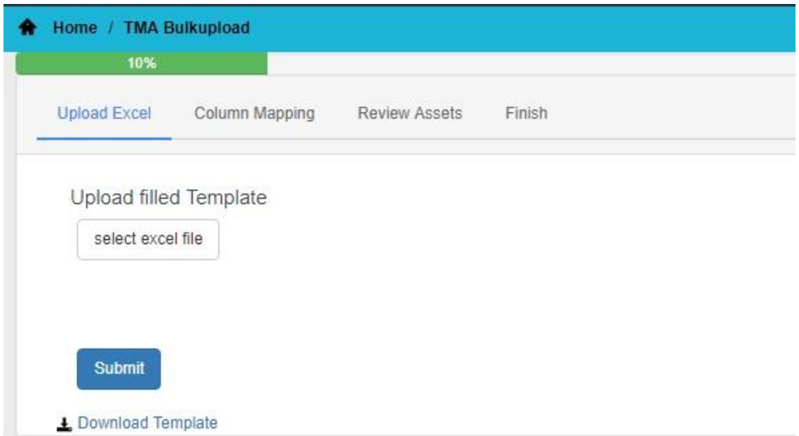
Tek Managed Assets can be added to CalWeb using two methods:

- Single Asset Add - This option can be accessed by clicking on the Add Tek Managed Asset tile in the Request/Help menu
- Bulk Asset Add - This option can be accessed by clicking on the Add Asset Bulk Upload TMA tile in the Request/Help menu



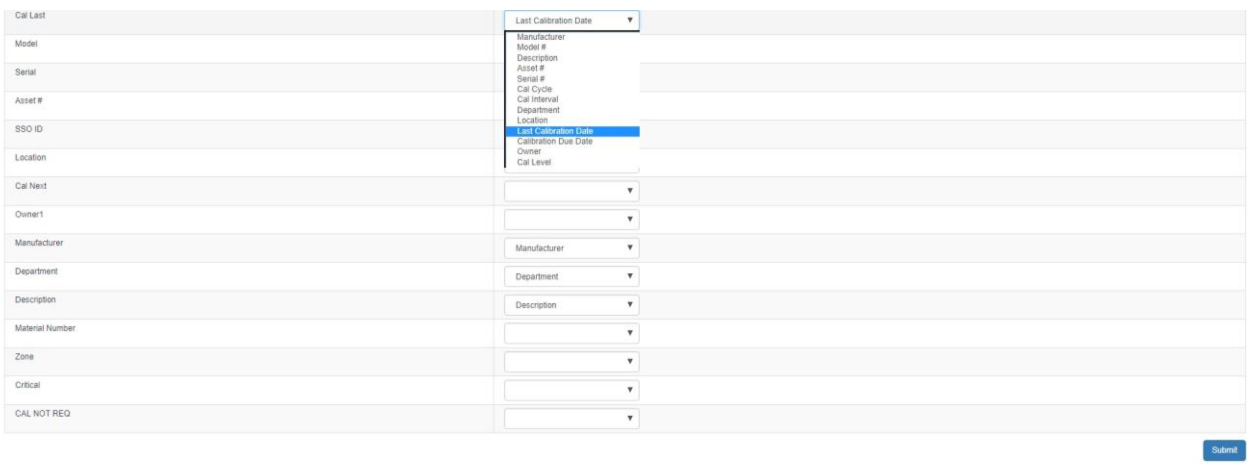
Single Asset Add

The Single Asset Add allows users to add single assets real-time to the Tek Managed Asset list by filling out the form and submitting. The fields on this form can be customized for each customer. The users can also add an attachment to the Asset Document History using the Attachment option.



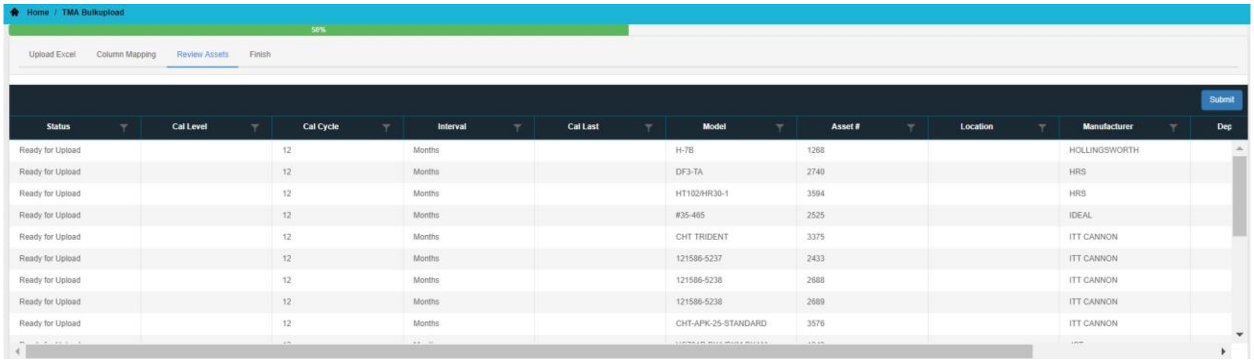
Upload Excel

A template can be used by clicking on the Download Template link on the TMA Bulk Upload view. After the assets have been added to the file, click on the Select Excel File to upload the file and then Submit.



Column Mapping

After the spreadsheet has been uploaded, the user will map the excel spreadsheet fields to the CalWeb fields by selecting the CalWeb field from the dropdown.



Review Assets

Once the columns have been mapped, the user can review the assets before submitting them for the final step of the upload process.

Finish

Once the list has been submitted, it will be queued for processing. An email will be sent to the user to notify them of the status of the asset additions. Any errors will be noted in the excel spreadsheet attached to the email.

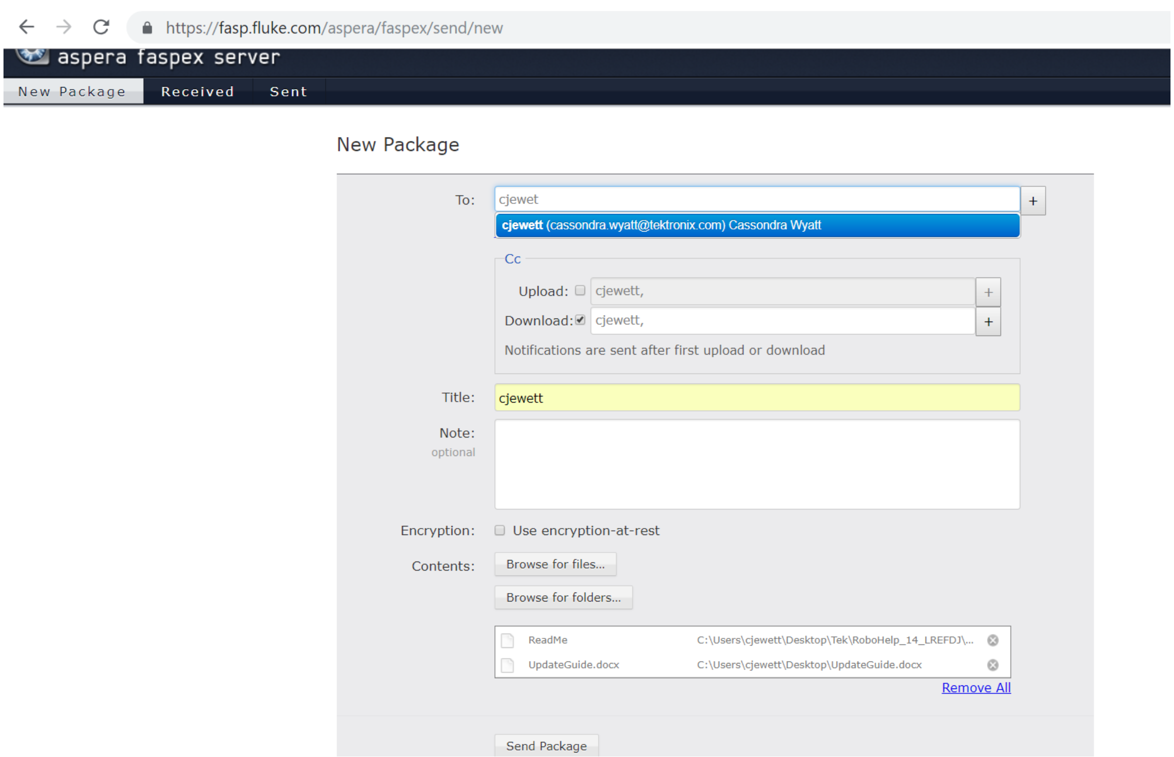
Adding Certificates for International Customers

There are two steps for adding Certificates

- Sending Certificates to the CalWeb group to be uploaded
- Uploading the Excel Spreadsheet of Service Events

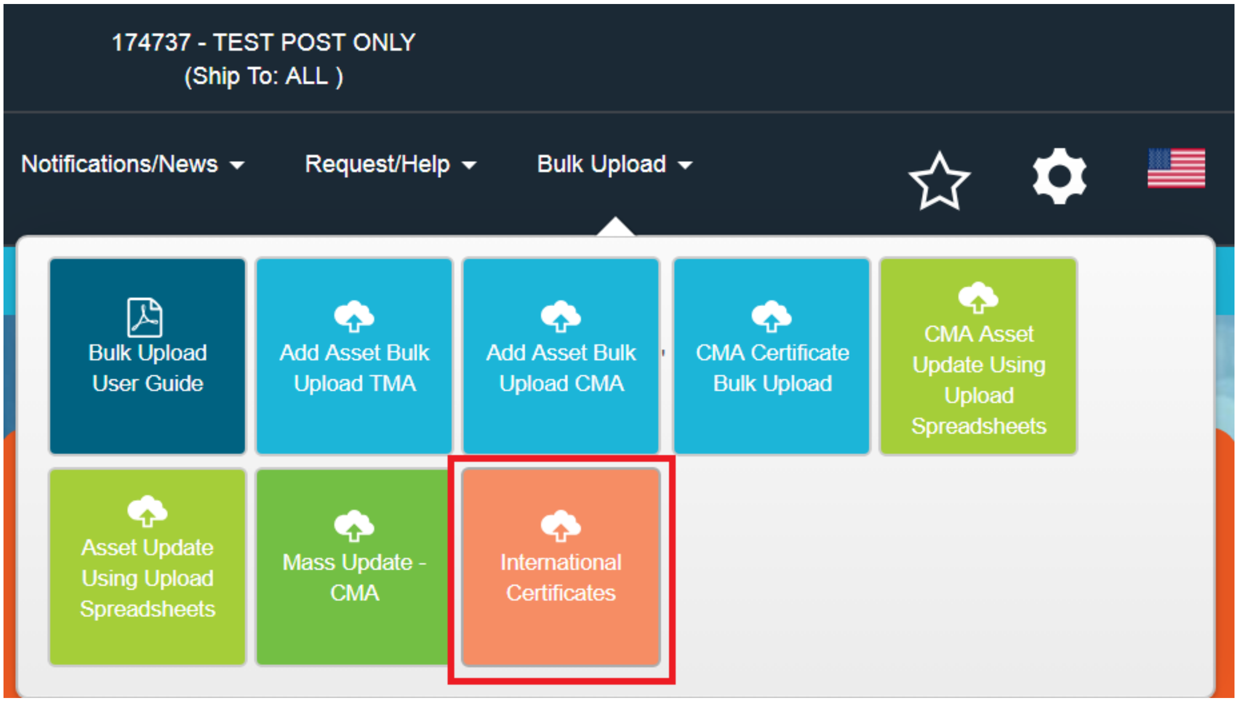
Sending Certificates to the CalWeb group to be uploaded

Go to https://downloads.asperasoft.com/ to download Aspera Connect. Once this has been installed, please send your certificates to user **cjewett (cassondra.wyatt@tektronix.com).** Once you have received confirmation that your certificates have been uploaded, you can go to the next step of the process, Uploading the Excel Spreadsheet of Service Events.



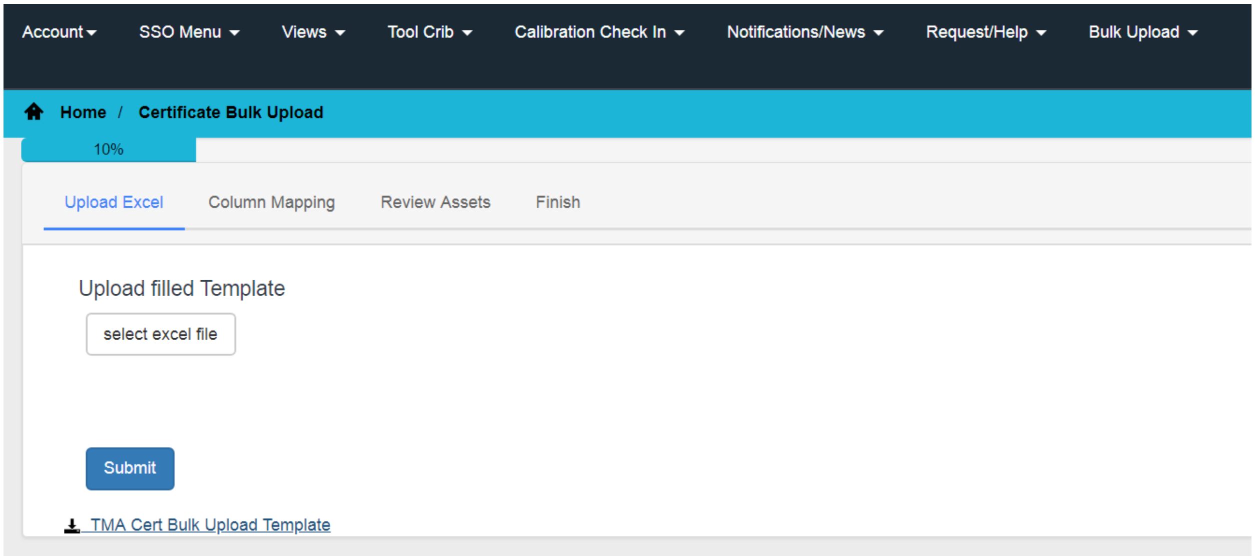
Uploading the Excel Spreadsheet of Service Events

The International Certificate Upload can be accessed via the Bulk Upload Menu.



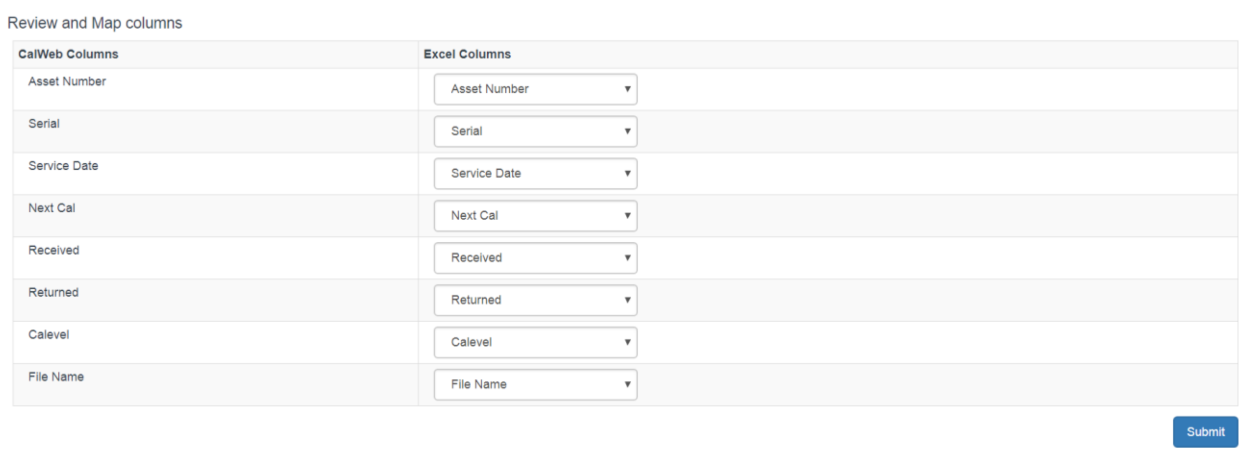
Upload Excel

A template can be used by clicking on the Download Template link on the Certificate Bulk Upload view. After the service events have been added to the file, click on the Select Excel File to upload the file and then Submit. **Please note that a unique serial number/asset number combination and file name is required for all service events.**



Column Mapping

After the spreadsheet has been uploaded, the user will map the excel spreadsheet fields to the CalWeb fields by selecting the CalWeb field from the dropdown.

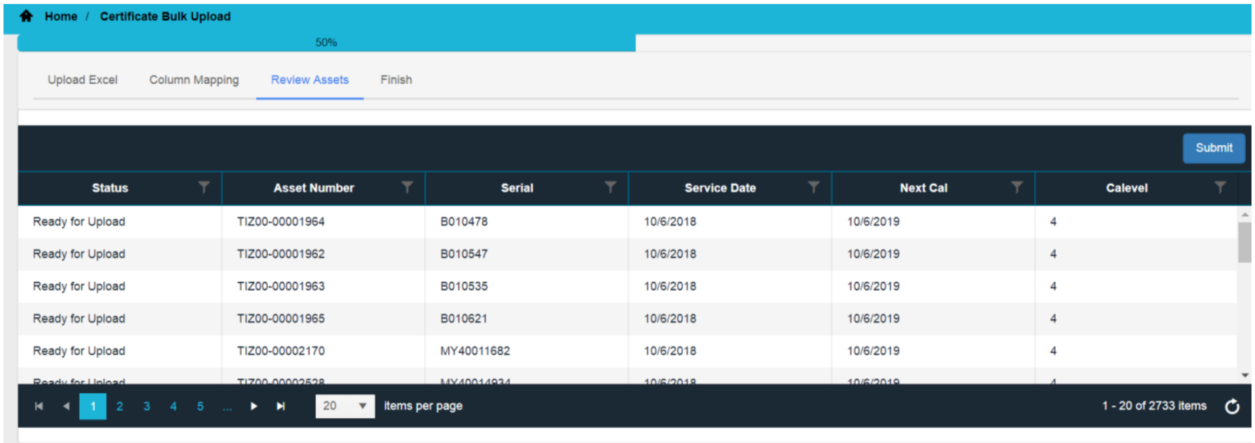

Review and Map columns

CalWeb Columns	Excel Columns
Asset Number	Asset Number
Serial	Serial
Service Date	Service Date
Next Cal	Next Cal
Received	Received
Returned	Returned
Calevel	Calevel
File Name	File Name

Submit

Review Assets

Once the columns have been mapped, the user can review the service events before submitting them for the final step of the upload process.



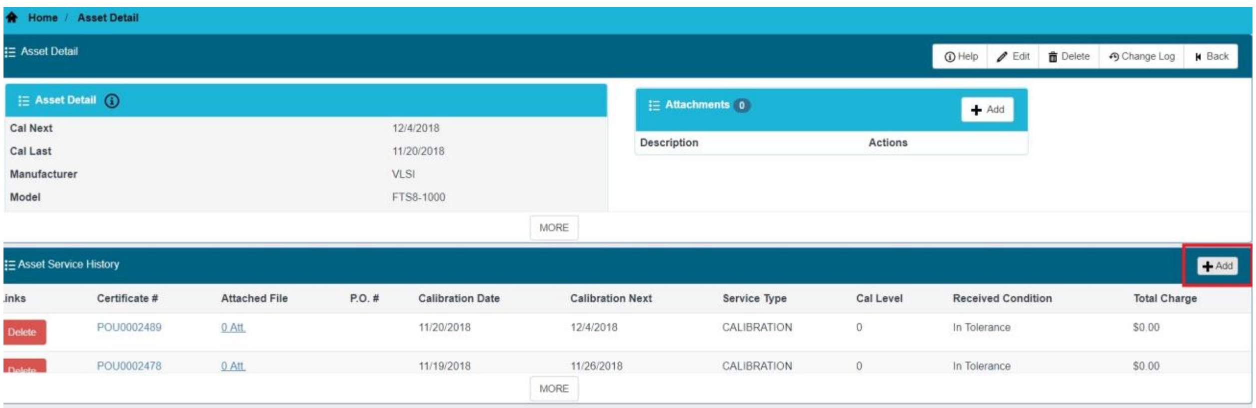
Finish

Once the list has been submitted, it will be queued for processing. An email will be sent to the user to notify them of the status of the service event additions. Any errors will be noted in the excel spreadsheet attached to the email.

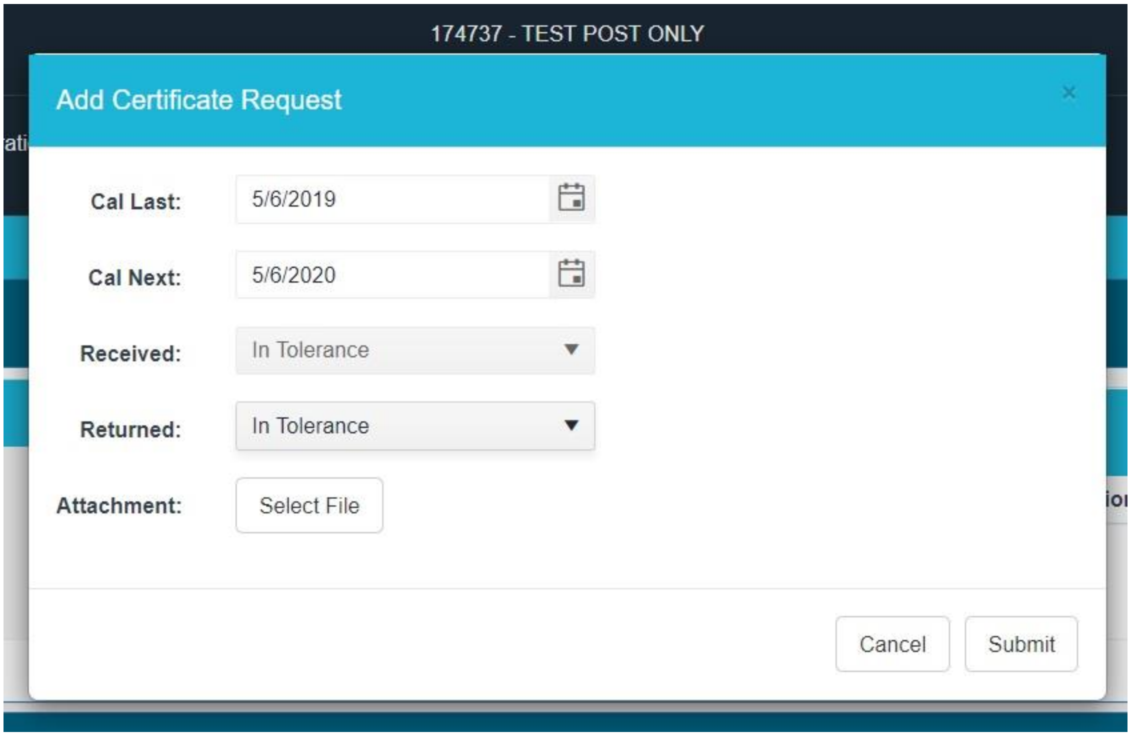
Adding Certificates for Post Only Customers

Navigating to the Add Certificate Form

The Add Certificate link is located in the Asset Detail view. Please navigate to the Asset Detail page via the Tek Managed Asset list and click on the Add button in the Asset Service History header,



Adding the Service Event Information and Attaching the Certificate



Fill out the Add Certificate Request form with the appropriate information, use the Select File button to attach the certificate, and click Submit to complete the certificate upload. (NOTE: You will need to combine the cover sheet template and hand-written documents into a single PDF file using a tool that can create/merge PDF documents. There are free ones you can use online or you can purchase Adobe Acrobat.)

Adding Customer Managed Assets

Customer Managed Assets can be added to CalWeb using two methods:

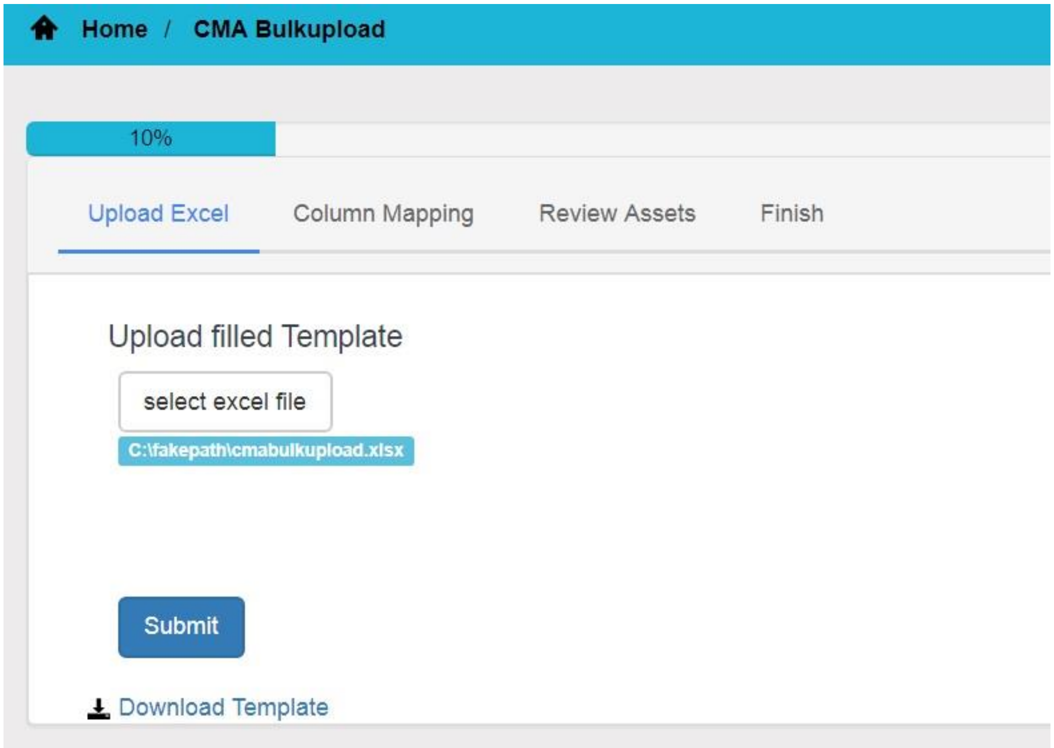
- Single Asset Add - This option can be accessed by clicking on the Add Asset button in the Customer Managed Assets screen
- Bulk Asset Add - This option can be accessed by clicking on the Add Asset Bulk Upload CMA tile in the Request/Help menu

Single Asset Add

The Single Asset Add allows users to add single assets real-time to the Customer Managed Asset list by filling out the form and submitting. The fields on this form can be customized for each customer.

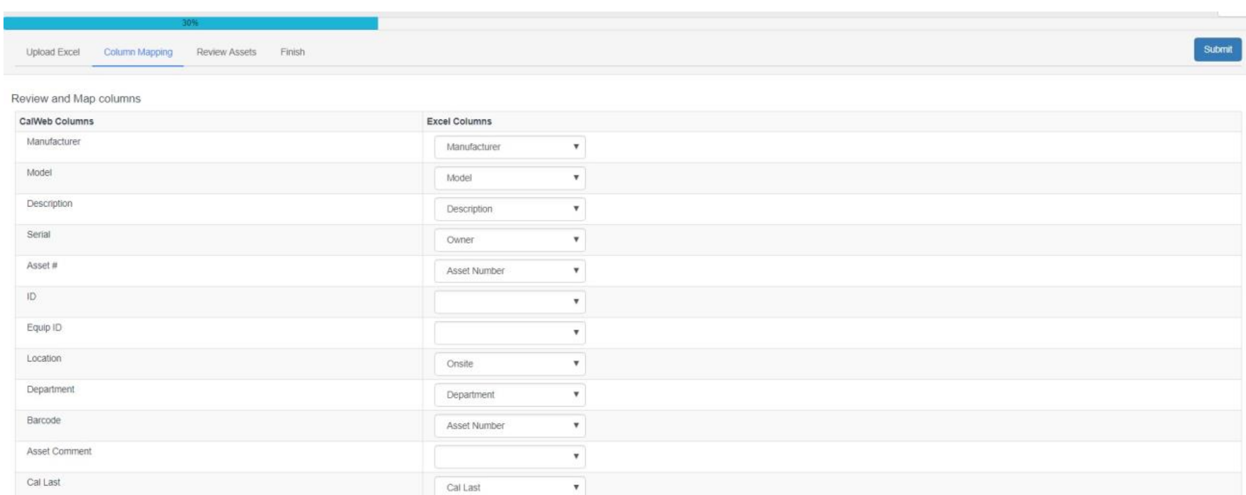
Bulk Asset Add

Multiple assets can be added at once using the Bulk Asset Add feature.



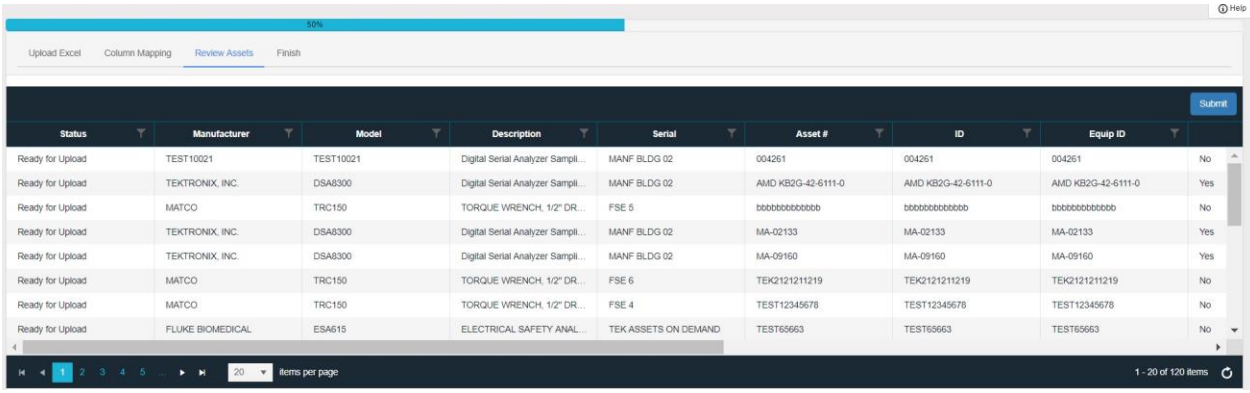
Upload Excel

A template can be used by clicking on the Download Template link on the TMA Bulk Upload view. After the assets have been added to the file, click on the Select Excel File to upload the file and then Submit.



Column Mapping

After the spreadsheet has been uploaded, the user will map the excel spreadsheet fields to the CalWeb fields by selecting the CalWeb field from the dropdown.



Review Assets

Once the columns have been mapped, the user can review the assets before submitting them for the final step of the upload process.

Finish

Once the list has been submitted, it will be queued for processing. An email will be sent to the user to notify them of the status of the asset additions. Any errors will be noted in the excel spreadsheet attached to the email.

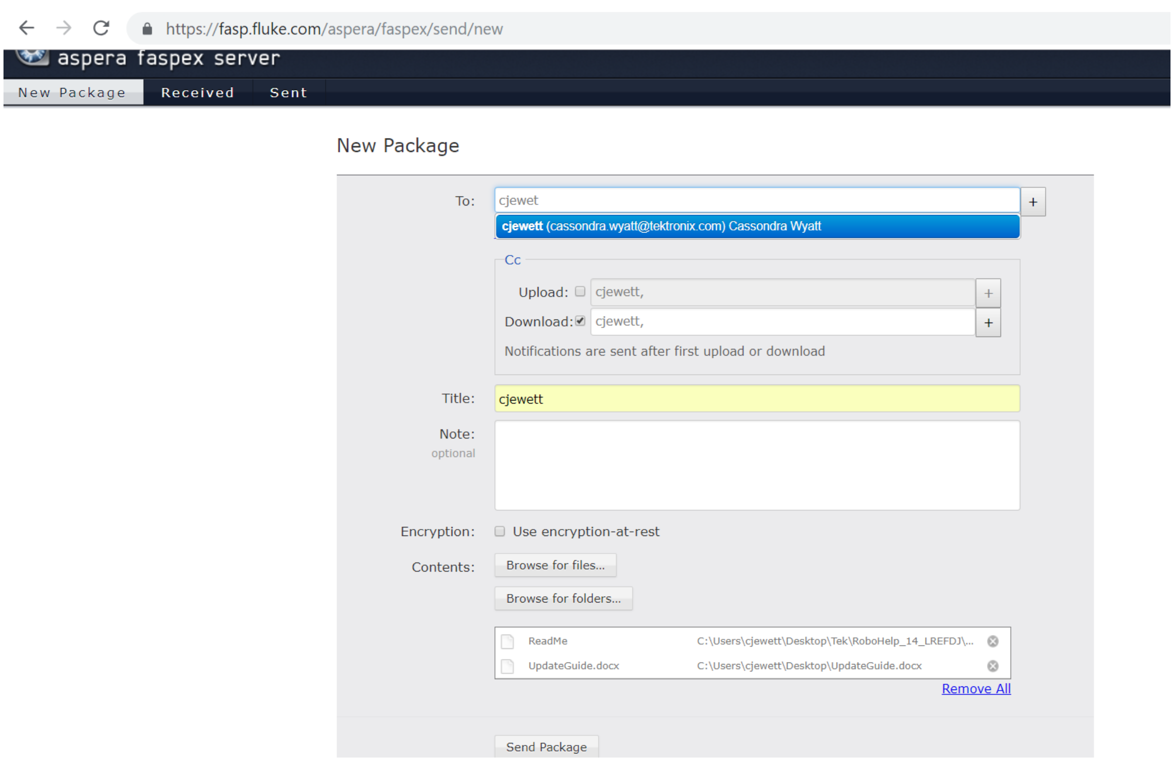
Adding Bulk Certificates for Customer Managed Assets

here are two steps for adding Certificates

- Sending Certificates to the CalWeb group to be uploaded
- Uploading the Excel Spreadsheet of Service Events

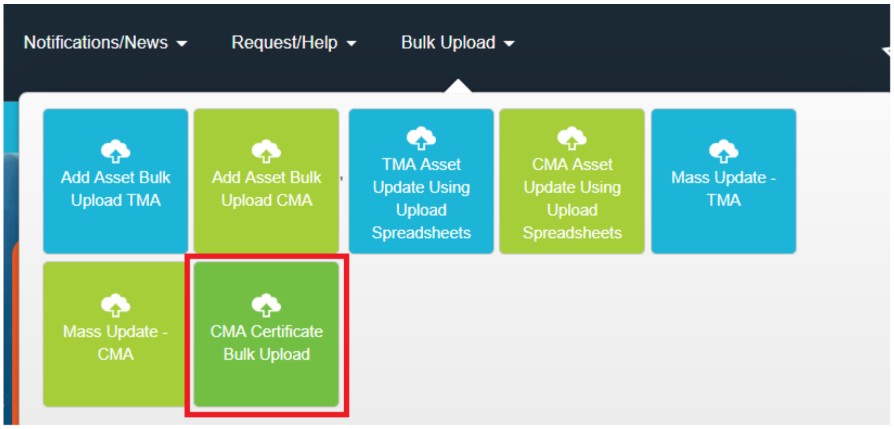
Sending Certificates to the CalWeb group to be uploaded

Go to https://downloads.asperasoft.com/ to download Aspera Connect. Once this has been installed, please send your certificates to user **cjewett (cassondra.wyatt@tektronix.com).** Once you have received confirmation that your certificates have been uploaded, you can go to the next step of the process, Uploading the Excel Spreadsheet of Service Events.



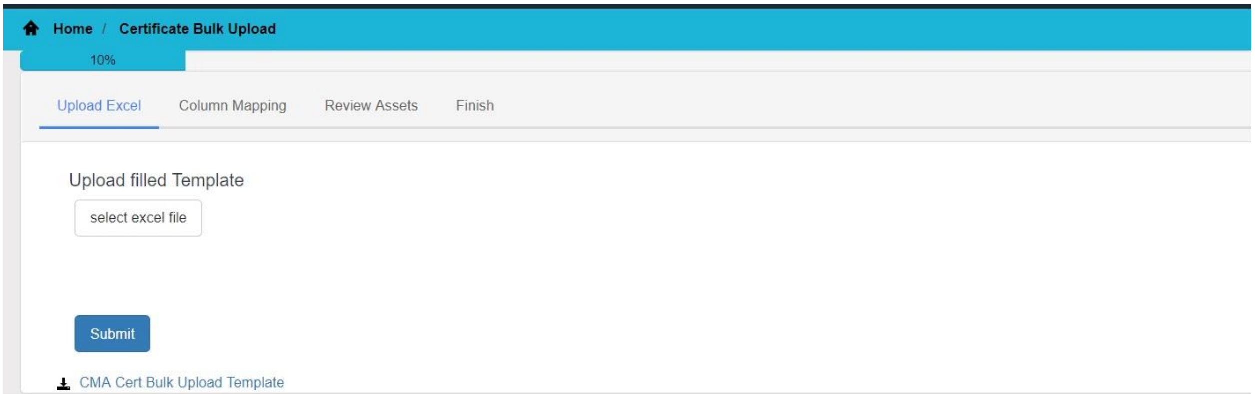
Uploading the Excel Spreadsheet of Service Events

The CMA Certificate Bulk Upload can be accessed via the Bulk Upload Menu.



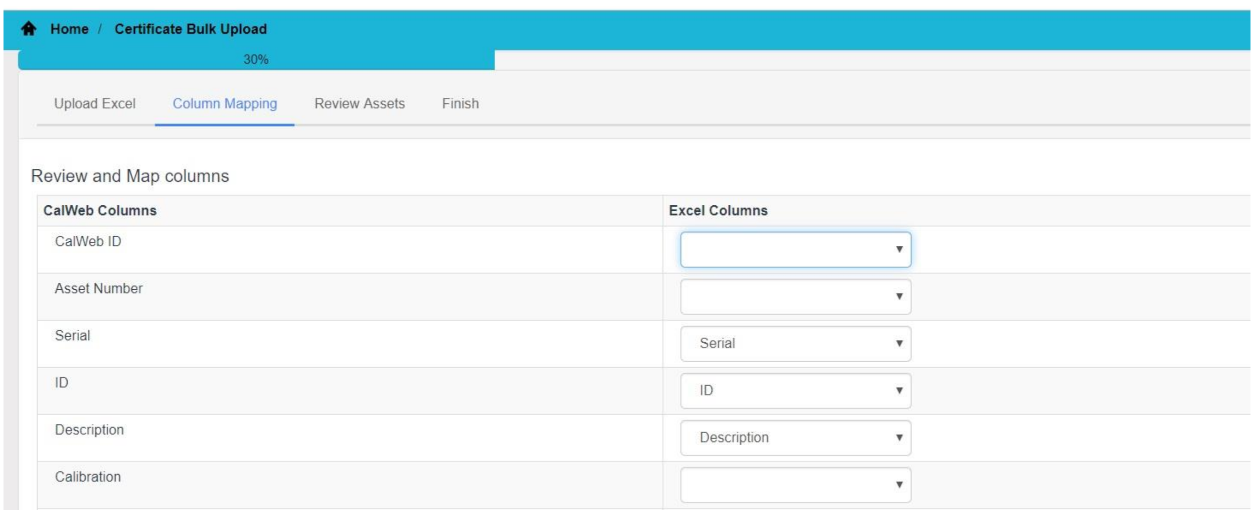
Upload Excel

A template can be used by clicking on the Download Template link on the Certificate Bulk Upload view. After the service events have been added to the file, click on the Select Excel File to upload the file and then Submit. **Please note that the CalWeb ID is required for each service event.**



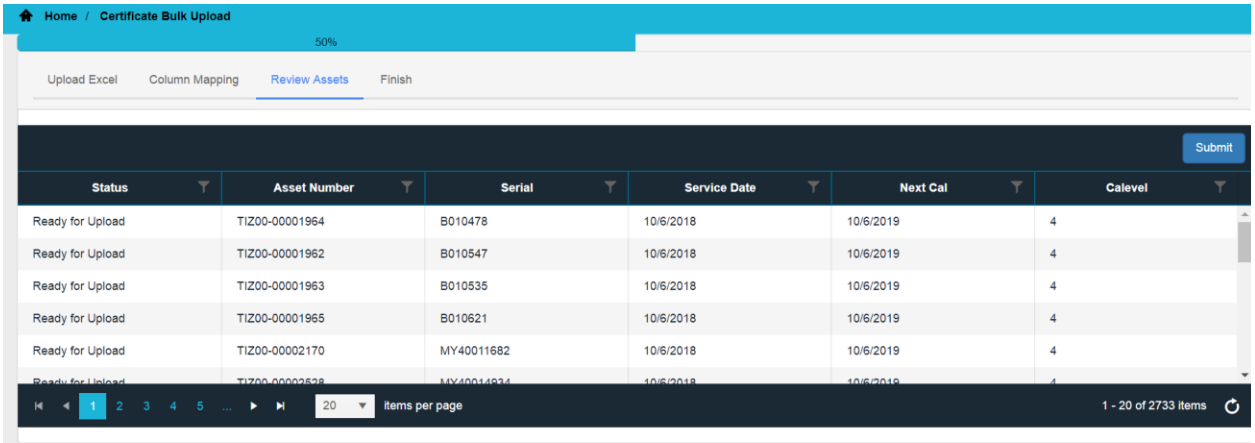
Column Mapping

After the spreadsheet has been uploaded, the user will map the excel spreadsheet fields to the CalWeb fields by selecting the CalWeb field from the dropdown.



Review Assets

Once the columns have been mapped, the user can review the service events before submitting them for the final step of the upload process.



Finish

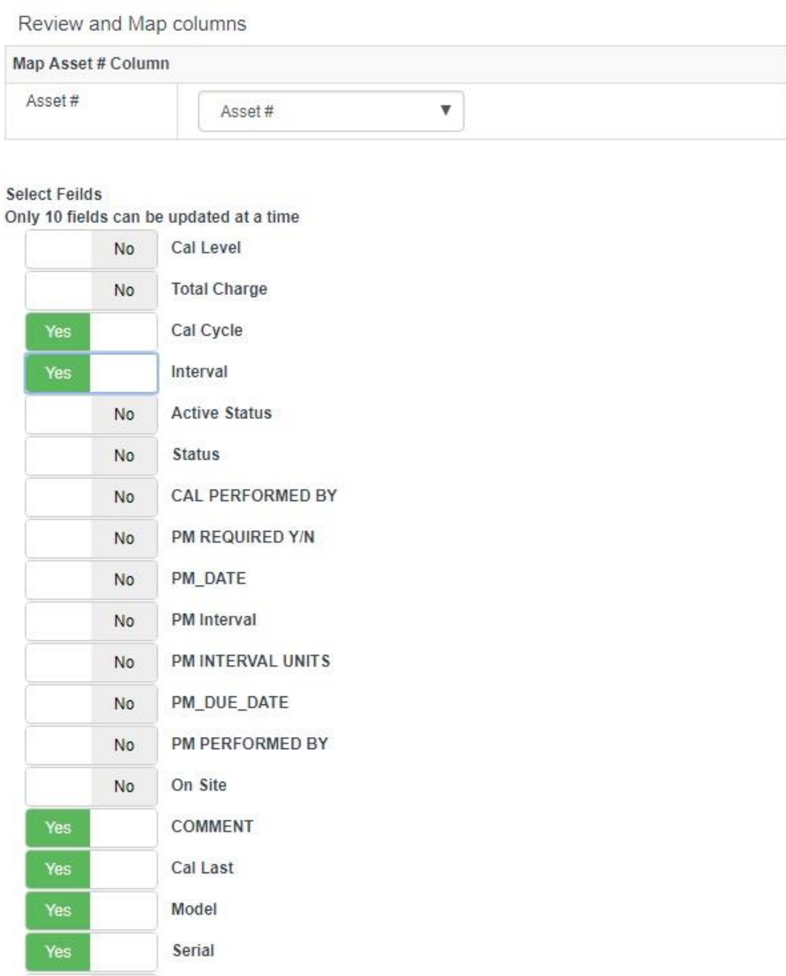
Once the list has been submitted, it will be queued for processing. An email will be sent to the user to notify them of the status of the service event additions. Any errors will be noted in the excel spreadsheet attached to the email.

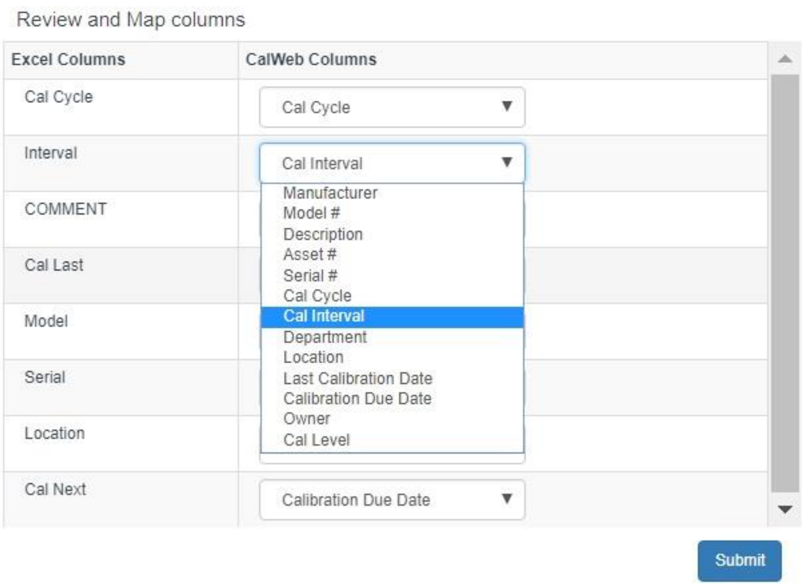
Asset Update Using Upload Spreadsheets

The Asset Update Using Upload Spreadsheets will allow the user to update a group of assets by uploading an excel spreadsheet. In order to access this feature, click on the Asset Update Using Upload Spreadsheets tile in the 'Bulk Upload' menu.

Upload Excel

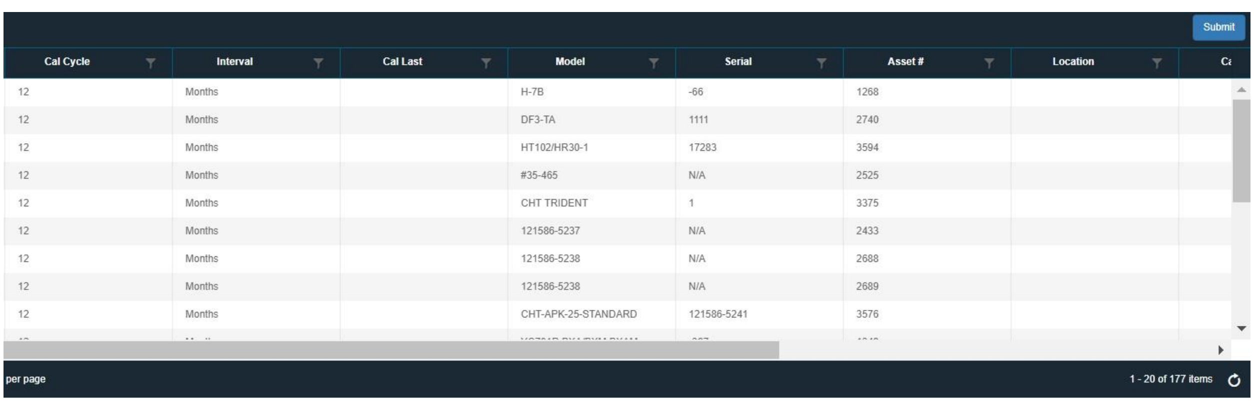
A template can be used by clicking on the Download Template link on the Asset Update view or by emailing the asset list and making the changes in the .xlsx file. After the changes have been made, click on the Select Excel File to upload the file and then Submit.





Review and Map Columns

After uploading the spreadsheet, select the columns that you would like to update by toggling the button to 'Yes' and clicking Submit. Next, map the excel fields to the CalWeb columns and then click Submit.

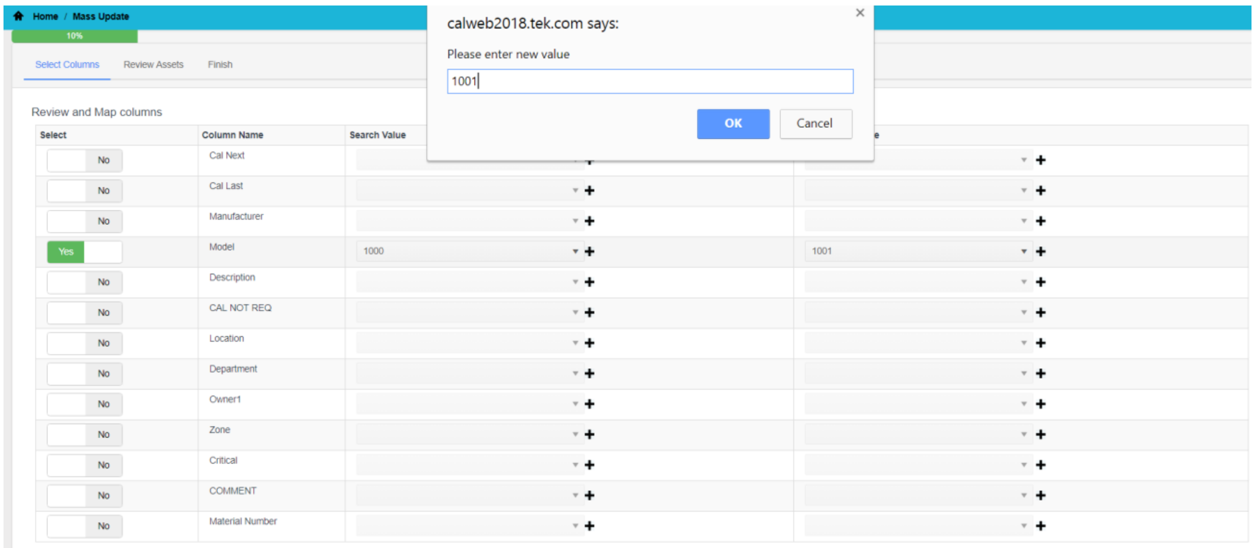


Finish Submission

After the list has been reviewed, any errors will be displayed in the result list. Once the list has been reviewed, click Submit to perform the final step to update the data.

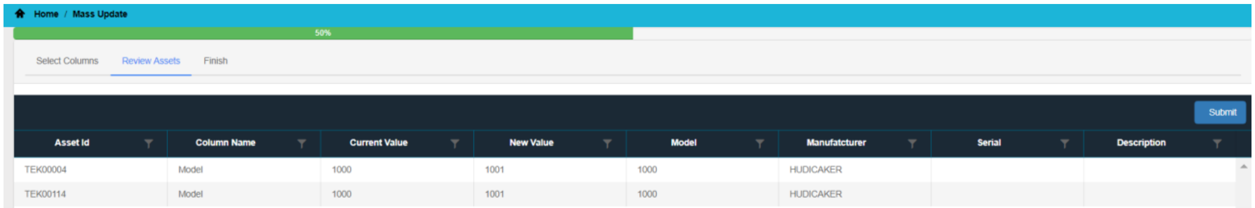
Mass Update - Tek Managed Assets

The Mass Update for Tek Managed Assets will allow the user to update a group of assets with a specific value to a new value. In order to access this feature, click on the Mass Update - TMA tile in the 'Bulk Upload' menu.



Select Columns

1. Select the column(s) you would like to update by toggling the yes/no selection. Fields with 'Yes' selected will be updated.
2. Select the current value of the assets in the 'Search Value' column.
3. Select the new value from the New Column Value drop-down. If the value is not displayed in the drop-down, it can be added by clicking on the addition icon to the right of the drop-down.
4. Click on the Submit button.



Review Assets

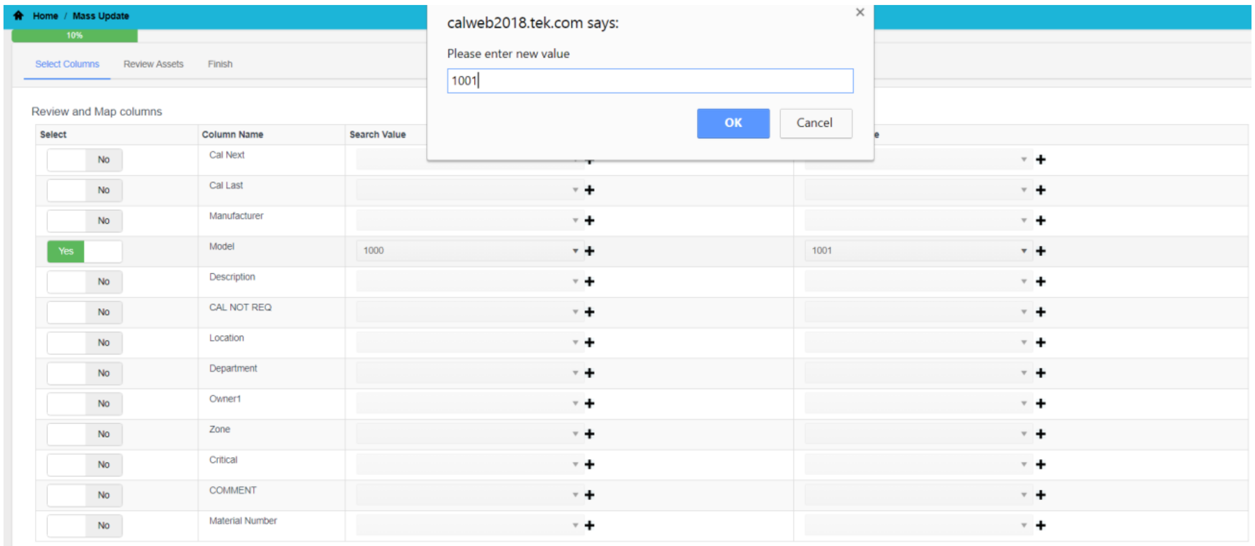
The assets that will be updated are displayed in a list for review. Please click on the Submit button to complete the process.

Finish

The assets will be queued for processing and an email notification will be sent upon completion.

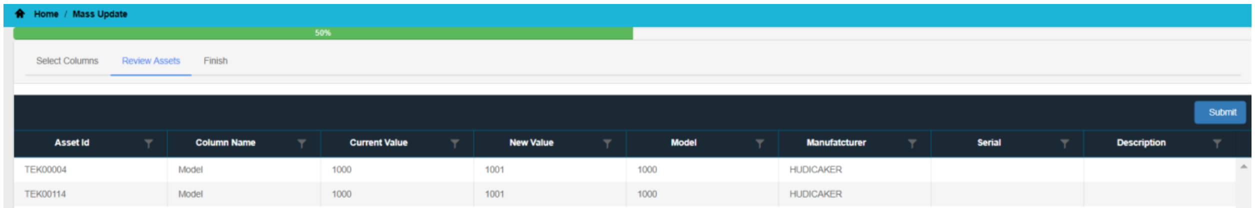
Mass Update - Customer Managed Assets

The Mass Update for Customer Managed Assets will allow the user to update a group of assets with a specific value to a new value. In order to access this feature, click on the Mass Update - CMA tile in the 'Bulk Upload' menu.



Select Columns

1. Select the column(s) you would like to update by toggling the yes/no selection. Fields with 'Yes' selected will be updated.
2. Select the current value of the assets in the 'Search Value' column.
3. Select the new value from the New Column Value drop-down. If the value is not displayed in the drop-down, it can be added by clicking on the addition icon to the right of the drop-down.
4. Click on the Submit button.



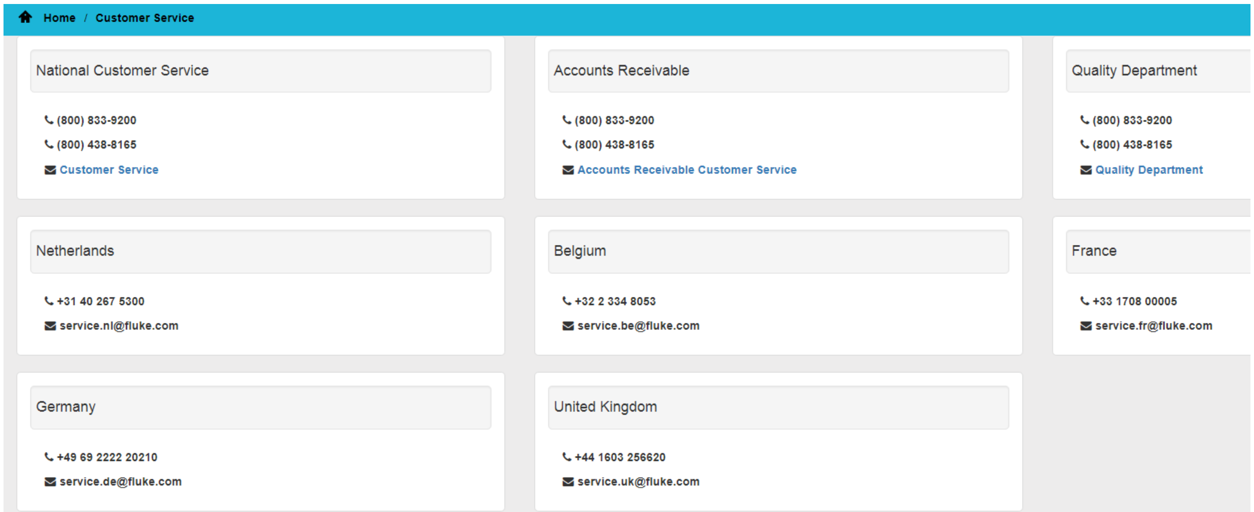
Review Assets

The assets that will be updated are displayed in a list for review. Please click on the Submit button to complete the process.

Finish

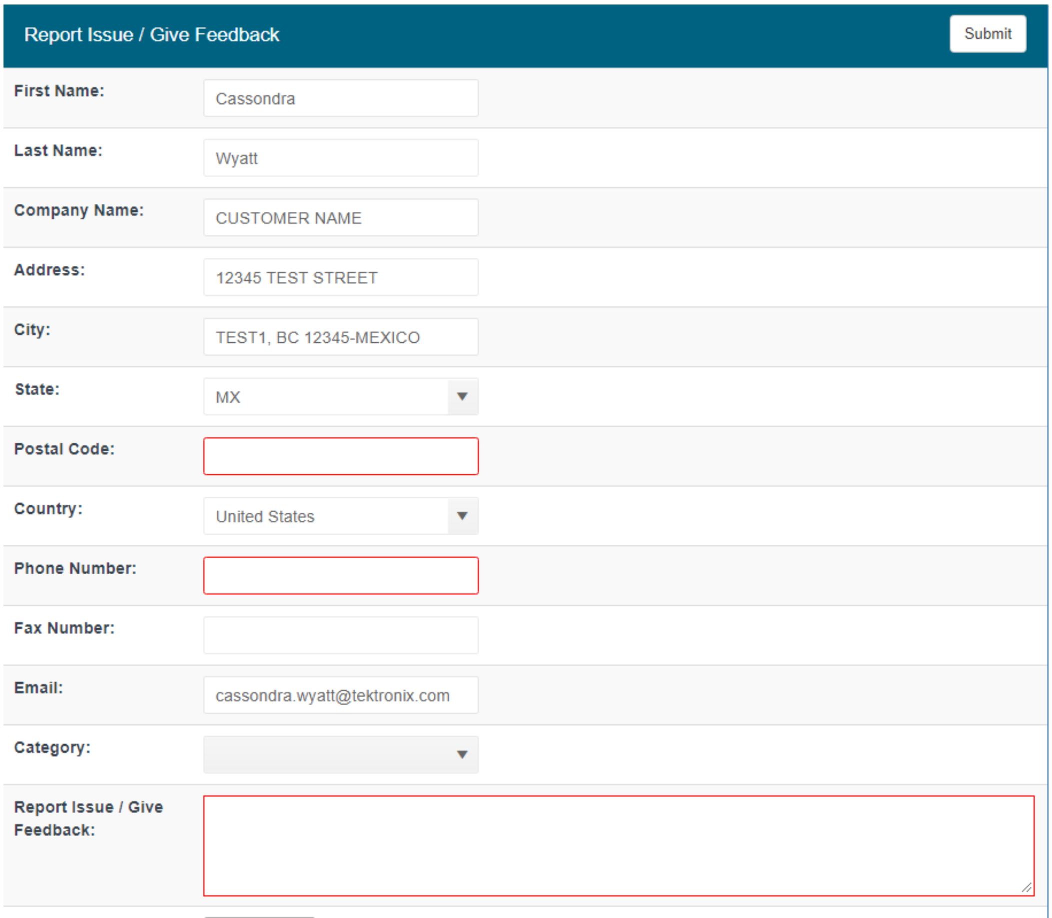
The assets will be queued for processing and an email notification will be sent upon completion.

Customer Service



The Customer Service feature provides information and links to various SSO departments/personnel. The user can either call or email questions/concerns to the appropriate SSO contacts. To access the Customer Service feature from the CalWeb menu, click on “Request/Help>>Customer Service”.

Report Issue/Give Feedback



Report Issue / Give Feedback

Submit

First Name:	Cassondra
Last Name:	Wyatt
Company Name:	CUSTOMER NAME
Address:	12345 TEST STREET
City:	TEST1, BC 12345-MEXICO
State:	MX
Postal Code:	
Country:	United States
Phone Number:	
Fax Number:	
Email:	cassondra.wyatt@tektronix.com
Category:	
Report Issue / Give Feedback:	

This area allows users to submit an issue to the SSO-Customer Care group.

Version Information

NotificationRev.pdf

Install Date	CALWEB Version	CALWEB Version - Description of Modifications
4/4/2017	11.5	**SeaWolf: Recall Configuration CMA & International - Owner Based:** **a)** Create the configuration capability for the Customer Managed Assets and International Assets for the Recall Notices on the SeaWolf platform, including the ability to send emails based on owner.
		SeaWolf: Mass Update Customer Managed Assets: **a)** Create the ability to update multiple Customer Managed Assets using the SeaWolf User Interface.
		SeaWolf: Mass Update Tek Managed Assets: **a)** Create the mass update to Tek Managed Assets functionality on the new SeaWolf platform, which will allow users to update multiple assets using the SeaWolf User Interface.
		SeaWolf: Custom Menu Items: **a)** Create the menu links for customer based custom reports and links on the new SeaWolf platform.
		SeaWolf: Customer Info Screen: **a)** Create the customer information screen on the new SeaWolf platform which allows customer based configurations.
		SeaWolf: Bulk upload International Certificates: **a)** Create the ability to upload certificates for assets belonging to the International Customers on the SeaWolf platform.
		Enhanced Password Recovery and Account Activation Notice:

The Version Information link allows users to view all of the CalWeb Modifications done in each release. It includes the Install Date, the CalWeb Version and a description of the modifications. It is viewable by navigating to Request/Help >> CalWeb Version Information.

Validation Documentation

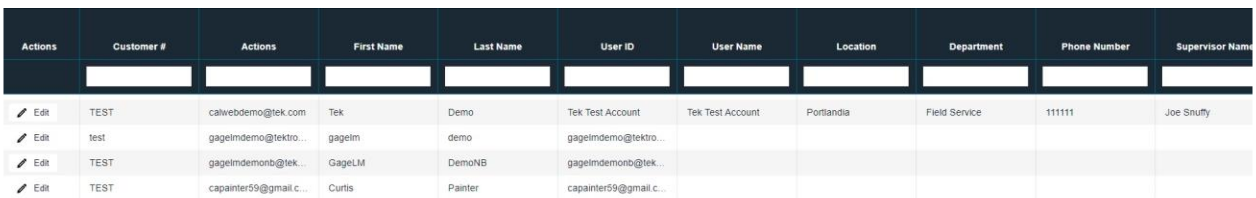
The Validation Documentation page contains a list of links for each CalWeb version. Each link will take you to the validation documentation for the release including the description, test plan, system requirements, etc. It is viewable by navigating to Request/Help >> CalWeb Validation Documentation.

Tool Crib Administration

The Tool Crib Administration area is available to Tektronix Internal users and CalWeb users that are set up as Tool Crib Administrators.

User List

The administration page contains a list of all active CalWeb users for a customer account. Clicking on the Edit link will open up the User Set Up screen for the selected user. This list can be sorted by clicking on the column headers and filtered by filling in the text entry fields with the requisite criteria.



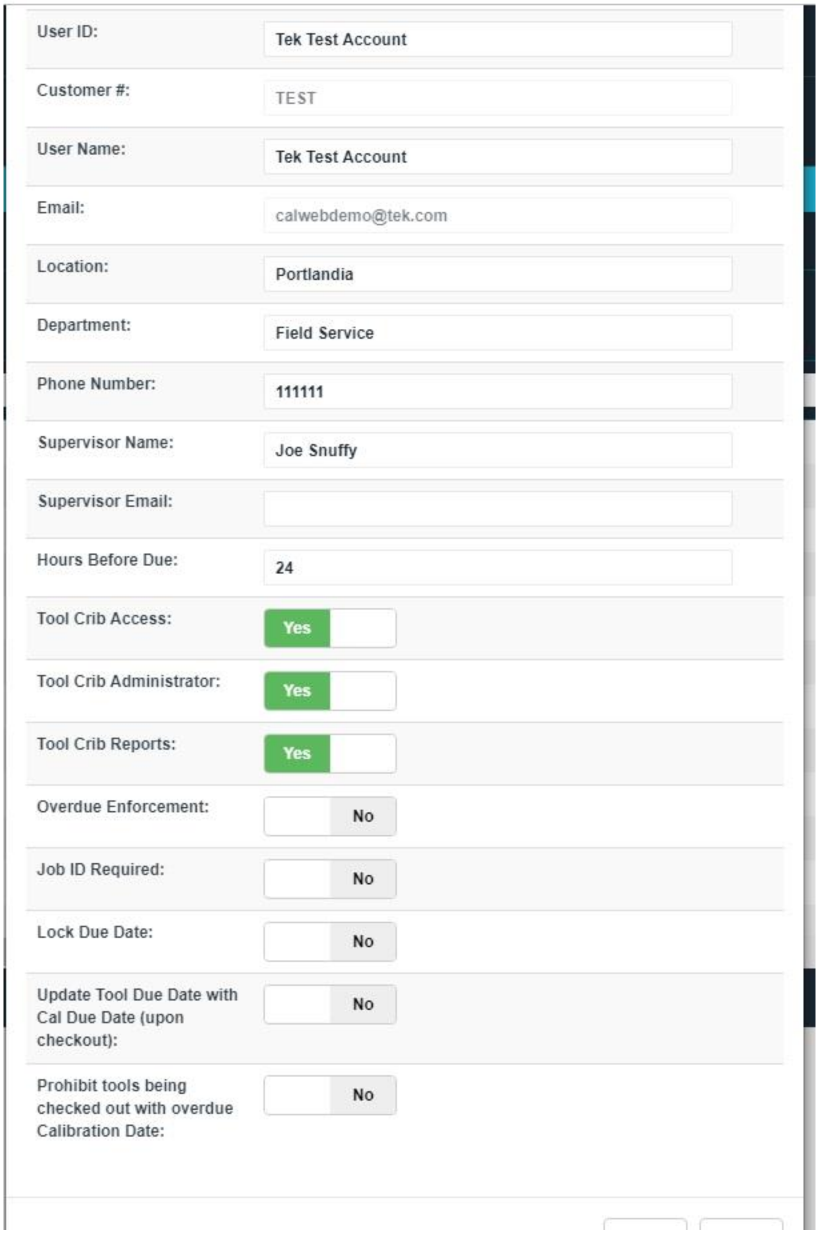
Actions	Customer #	Actions	First Name	Last Name	User ID	User Name	Location	Department	Phone Number	Supervisor Name
Edit	TEST	calwebdemo@tek.com	Tek	Demo	Tek Test Account	Tek Test Account	Portlandia	Field Service	111111	Joe Snuffy
Edit	test	gagelmdemo@tektro...	gagelm	demo	gagelmdemo@tektro...					
Edit	TEST	gagelmdemonb@tek...	GageLM	DemoNB	gagelmdemonb@tek...					
Edit	TEST	capainter59@gmail.c...	Curtis	Painter	capainter59@gmail.c...					

User Set Up

Tool Crib users can be enabled with several options to customize the Tool Crib experience.

User ID: The Tool Crib User ID the user will use to sign into the Tool Crib Kiosk. This ID will also be captured for Tool Crib asset report purposes.
Customer Number: The selected customer account for the user. This field is for display purposes only and cannot be edited.
User Name: The Tool Crib user name that will be displayed in reports.
Email: The CalWeb user email address. This field is for display purposes only and cannot be edited.
Location: The location field can be filled out based on customer preference.
Department: The department field can be filled out based on customer preference.
Phone Number: The phone number of the Tool Crib User.
Supervisor Name: The name of the Tool Crib User's Supervisor.
Supervisor Email: The email address of the Tool Crib User's Supervisor.
Hours Before Due: This is the number of hours an asset can be checked out before it is due. For example if 24 hours is entered, the tool will be due 24 hours after the Check Out is submitted.

Tool Crib Access: This enables the selected user to have access to the Tool Crib. The user can access it on CalWeb via the Tool Crib menu or by signing into a kiosk based on the customer set up.
Tool Crib Administrator: This enables the selected user to be an administrator for the Tool Crib. Administrators can access other Tool Crib user accounts and update their settings.
Tool Crib Reports: This enables the Tool Crib Reports feature in the Tool Crib menu in CalWeb.
Overdue Enforcement: This prohibits a user from checking out tools if the user has any overdue tools.
Job ID Required: This setting will require the Job ID when submitting the tool for Check Out.
Lock Due Date: This setting will keep the due date from being modified upon Tool Check Out.
Update Tool Due Date with Cal Due Date: This setting will update the due date with the Cal Due Date upon Tool Check Out.
Prohibit Tools Being Checked Out with Overdue Calibration Date: This will prohibit a tool from being checked out if the tool is overdue for calibration.


User ID:
Tek Test Account
Customer #:
TEST
User Name:
Tek Test Account
Email:
calwebdemo@tek.com
Location:
Portlandia
Department:
Field Service
Phone Number:
111111
Supervisor Name:
Joe Snuffy
Supervisor Email:
Hours Before Due:
24
Tool Crib Access:
Yes
Tool Crib Administrator:
Yes
Tool Crib Reports:
Yes
Overdue Enforcement:
No
Job ID Required:
No
Lock Due Date:
No
Update Tool Due Date with Cal Due Date (upon checkout):
No
Prohibit tools being checked out with overdue Calibration Date:
No

Tool Crib Check Out/Check In

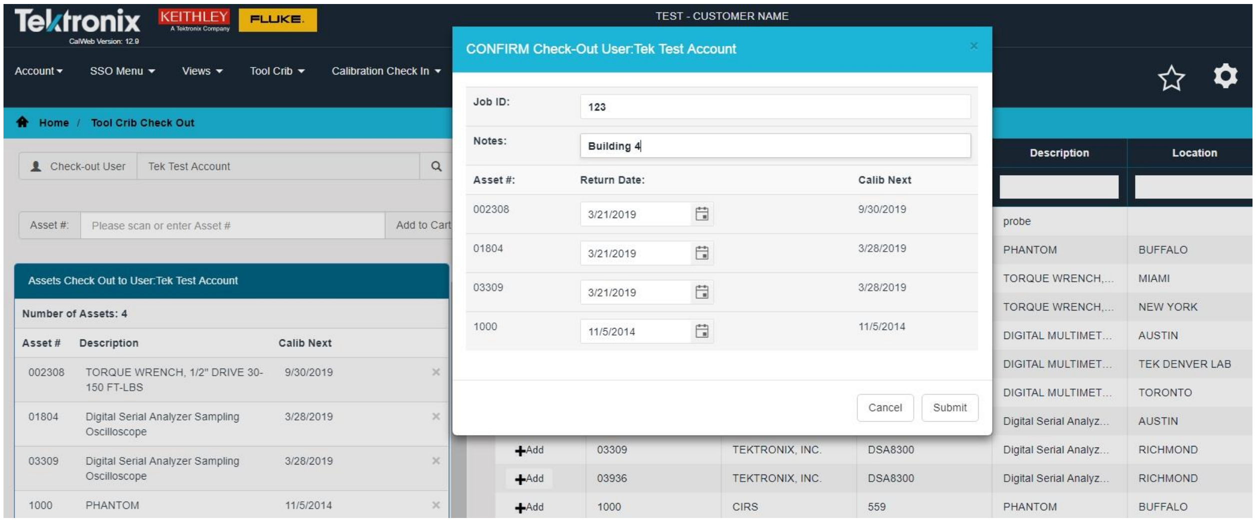
The Tool Crib feature provides a way for customers to track assets checked in and out of a 'Tool Crib'. This feature is accessible via the Tool Crib menu on CalWeb or a Tool Crib kiosk, based on the customer's preference. In order to access this feature, a person must have a CalWeb user account and be set up as a Tool Crib user.

Tool Crib Check Out

The Tool Crib Check In screen provides users the capability to check out multiple tools at one time. The user can scan the tool, type in the asset number or ID, or select a tool from the Tool Crib list by clicking on the 'Add' icon. The tool will then be added to the shopping cart, which contains the ID or asset number, and the description of the tool. Once all of the tools have been submitted, the user will click on the Confirm button and the confirmation screen will be displayed. If the Tool Crib user is an admin, a user must be selected in the Check-out User selection area.

Tool Crib Check Out Confirmation

On the confirmation screen, the user may add a Job ID and notes to the Check Out information. The user may also update the Return Date unless the '**Lock Due Date**' setting has been enabled. The default setting for the Return Date can be set in the user settings by entering '**Hours Before Due**' or by selecting the '**Update Tool Due Date with Cal Due Date'.**



Tool Crib Check In

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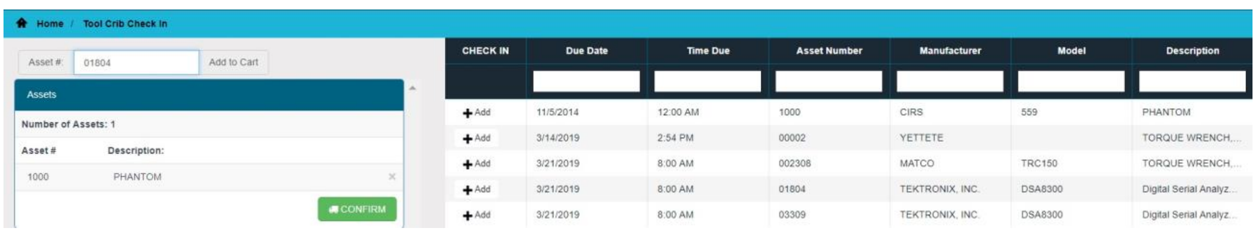
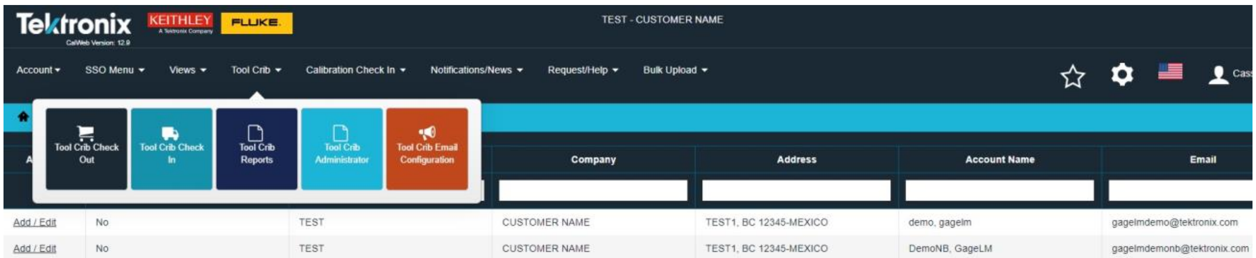


Tool Crib Email Notification

The Tool Crib Email Notification functionality sends e-mails to Tool Crib users notifying them that their tools are due to be checked back into the Tool Crib or overdue for Check In. This feature is available to administrative users of customers that have the Tool Crib enabled. The configuration user list is accessible from the Tool Crib menu.



Configuration User List

The Configuration User List displays all of the users for a customer account. This list can be searched by text entry into the column header text boxes. In order to access the user configuration screen, the administrator will click on the ***Add / Edit*** link on the user list.

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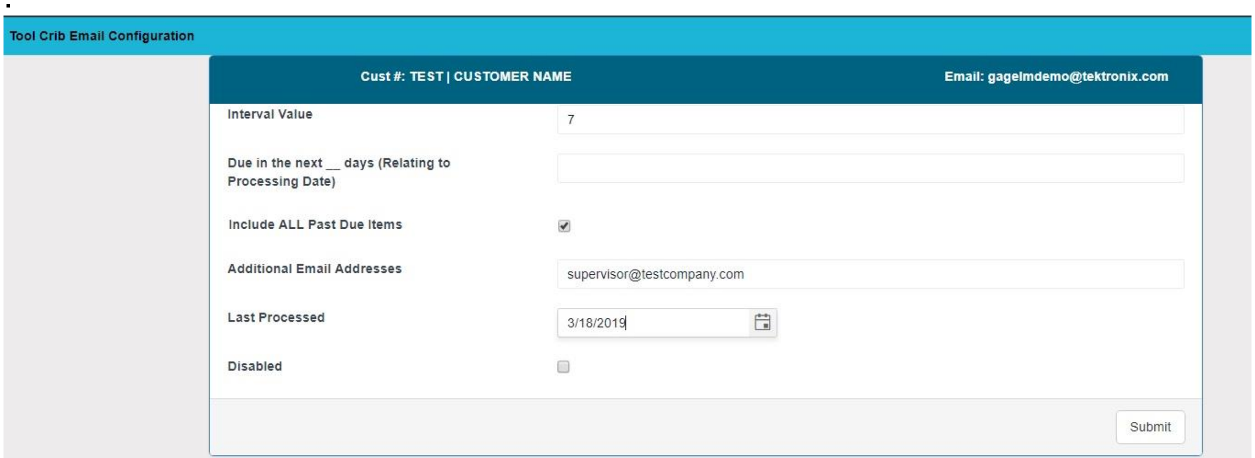


Configuration Screen

This screen shows the following items:

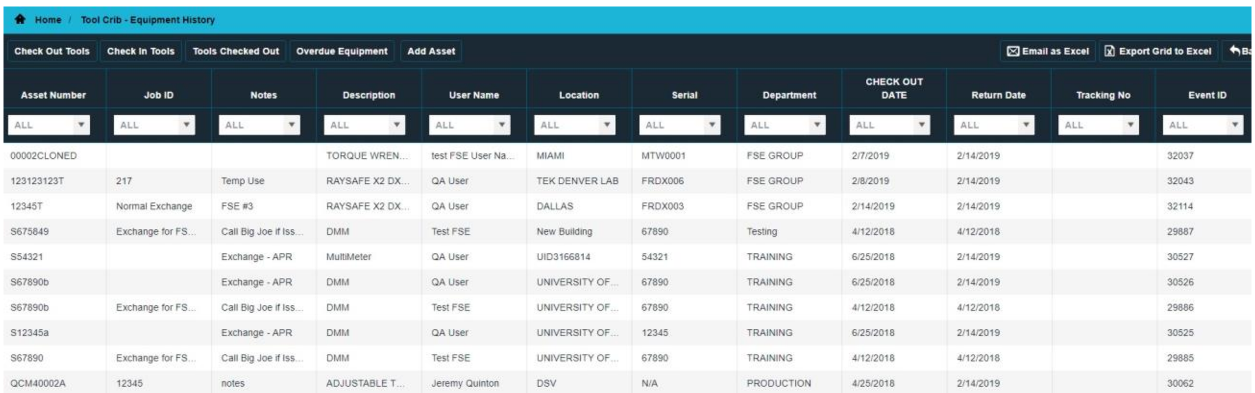
- ***Customer Account Number, Customer Name and User Email address -*** This information is provided to ensure the correct customer/user account combination is selected.
- ***Interval Value*** - This is the frequency of which the notifications will be sent to the user. In the figure above, the interval value is 7, so the email notification will be sent every 7 days.
- ***Due in the next __ days (Relating to Processing Date) -*** This is the number of days, from the processing date, that will be used to select the items on the list. For example, if the number of days due is 14, the list will contain any item due to be checked in 14 days from the day the email notification was sent out.
- ***Include ALL Past Due items -*** This will cause all items overdue to be checked in to be included in the list.
- ***Additional Email Addresses -*** A list of other email addresses that should receive the notification can be entered here. This list should be separated by semi-colons(;).
- ***Last Processed -*** This will display the date that the last email was sent. This date can also be changed to manage the day of the week the e-mail should be sent. For example, if a user should receive a notification every Monday, the Interval Value would be set to 7 and the Last Processed date should be set to the most recent Monday.
- ***Disabled -*** This check-box should be checked if the user should no longer receive e-mail notifications.

Tool Crib Reports

The Tool Crib Reports area provides information regarding the assets in the Tool Crib, such as the Check In and Check out history, overdue equipment. It also provides a way for multiple tools to be checked out to multiple users at the same time using the Check Out Tools feature.

Equipment History

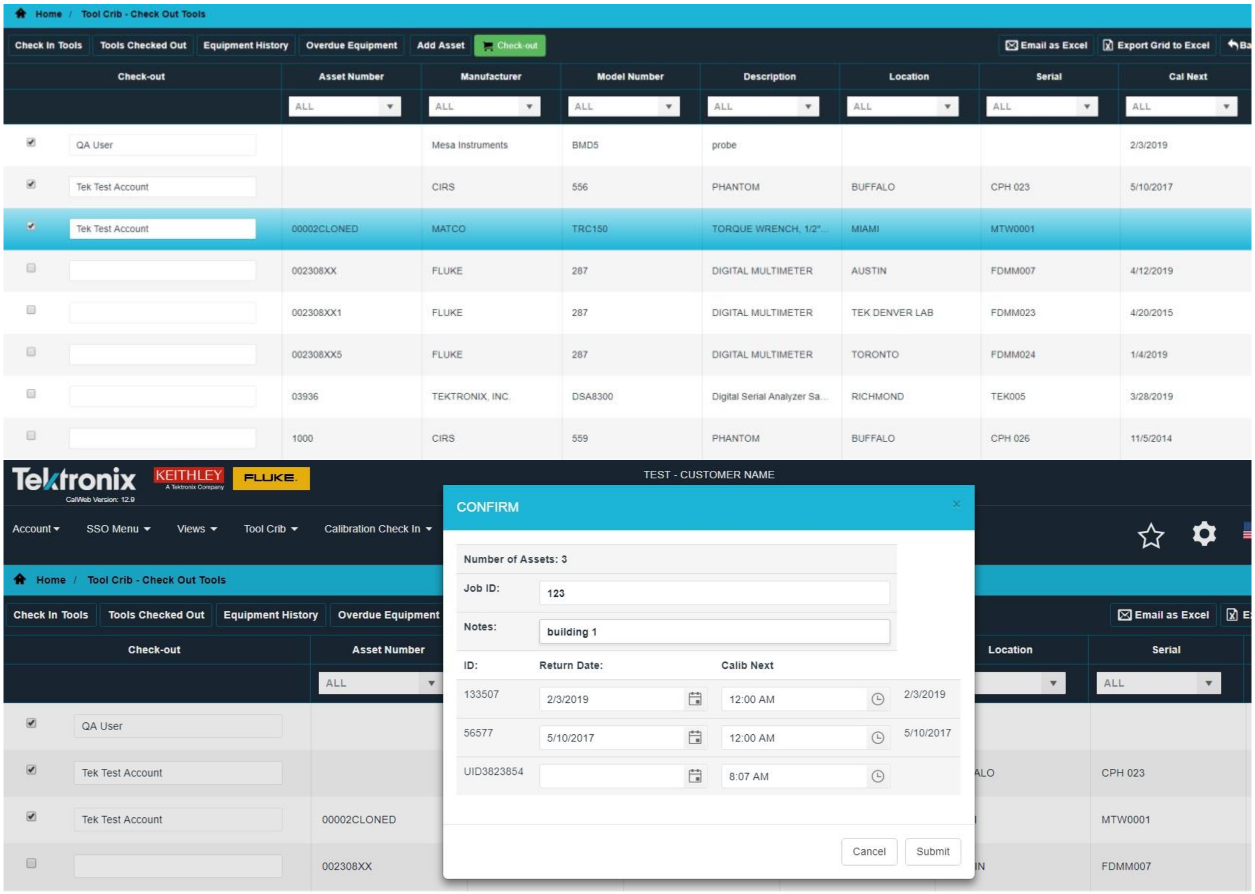
This report provides the history of the Tool Crib assets including the Check Out user, Check Out date, Return Date, etc.



Asset Number	Job ID	Notes	Description	User Name	Location	Serial	Department	CHECK OUT DATE	Return Date	Tracking No	Event ID
ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL	ALL
00002CLONED			TORQUE WREN...	test FSE User Na...	MIAMI	MTW0001	FSE GROUP	2/7/2019	2/14/2019		32037
123123123T	217	Temp Use	RAYSAFE X2 DX...	QA User	TEK DENVER LAB	FRDX006	FSE GROUP	2/8/2019	2/14/2019		32043
12345T	Normal Exchange	FSE #3	RAYSAFE X2 DX...	QA User	DALLAS	FRDX003	FSE GROUP	2/14/2019	2/14/2019		32114
S675849	Exchange for FS...	Call Big Joe if Iss...	DMM	Test FSE	New Building	67890	Testing	4/12/2018	4/12/2018		29887
S54321		Exchange - APR	MultiMeter	QA User	UID3166814	54321	TRAINING	6/25/2018	2/14/2019		30527
S67890b		Exchange - APR	DMM	QA User	UNIVERSITY OF...	67890	TRAINING	6/25/2018	2/14/2019		30526
S67890b	Exchange for FS...	Call Big Joe if Iss...	DMM	Test FSE	UNIVERSITY OF...	67890	TRAINING	4/12/2018	4/12/2018		29886
S12345a		Exchange - APR	DMM	QA User	UNIVERSITY OF...	12345	TRAINING	6/25/2018	2/14/2019		30525
S67890	Exchange for FS...	Call Big Joe if Iss...	DMM	Test FSE	UNIVERSITY OF...	67890	TRAINING	4/12/2018	4/12/2018		29885
QCM40002A	12345	notes	ADJUSTABLE T...	Jeremy Quinton	DSV	N/A	PRODUCTION	4/25/2018	2/14/2019		30062

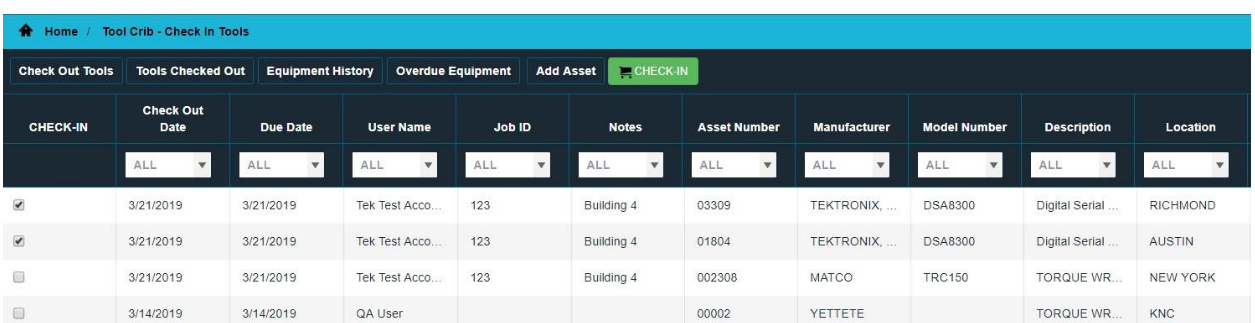
Check Out Tools

This feature provides a means of checking out multiple assets to multiple users at once. The user will select the check box for each asset and then select a user to whom to check out the asset. Once the assets have been selected and the Check-out button selected, the user will fill out other necessary information in the confirmation screen.



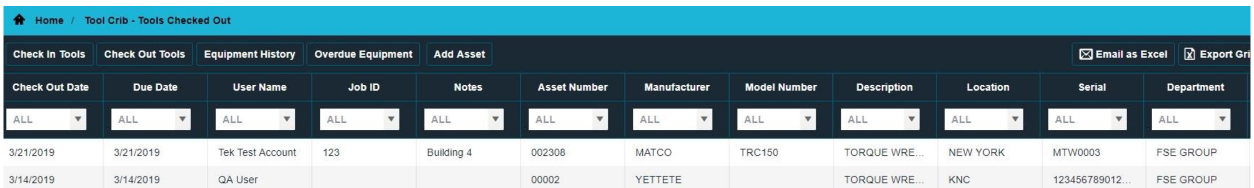
Check In Tools

The Check In Tools feature will provide the user with the ability to check in multiple tool at once. The user will select the check box for each tool and then click on the Check-In button. All of the selected tools will then be updated with the Checked In status and return date.



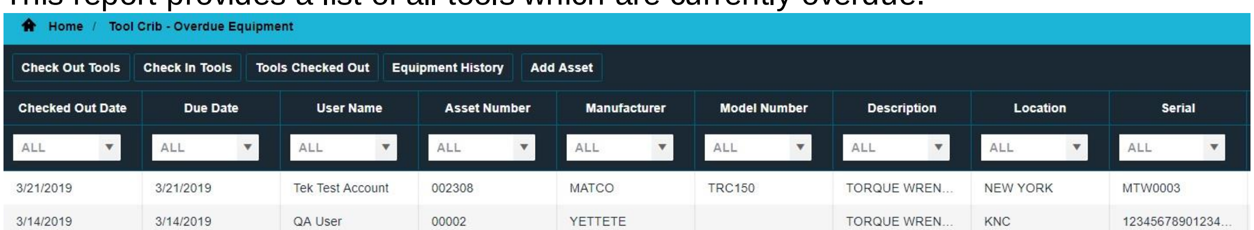
Tools Checked Out

This report provides a list of all tools currently checked out of the Tool Crib for a specific customer.



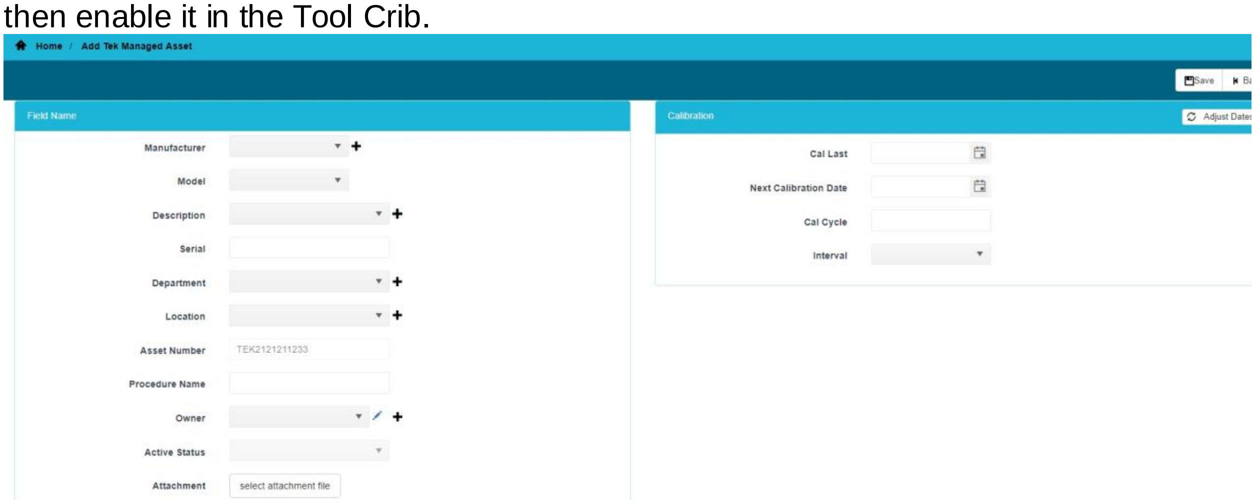
Overdue Equipment

This report provides a list of all tools which are currently overdue.

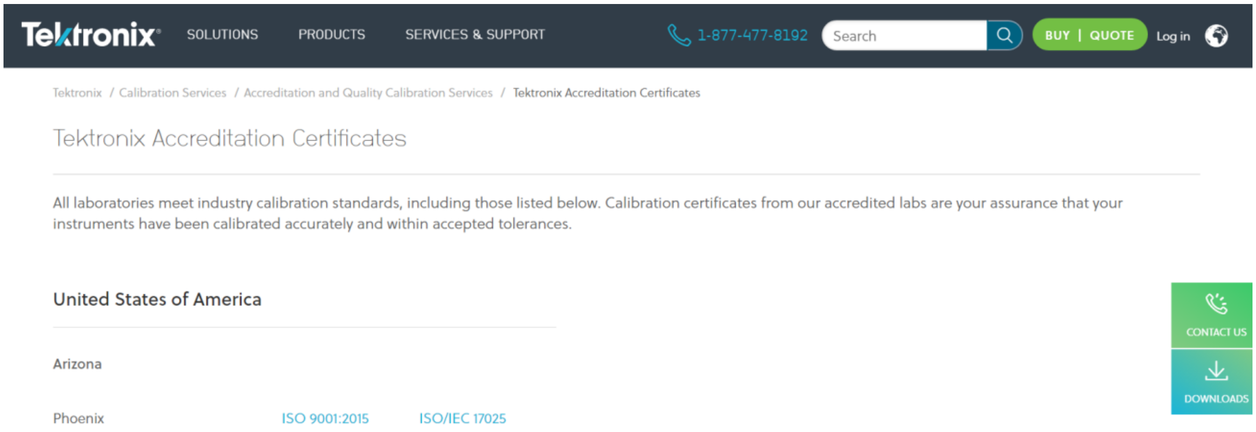


Add Tek Managed Asset

This form is provided for the user to add an asset to Tek Managed Assets, which will then enable it in the Tool Crib.



Lab Accreditation



This link redirects the user to the Tektronix Accreditation Certification page. It is viewable by navigating to Request/Help >> Lab Accreditations.