TEAM Server and Desktop
Operation Manual
Version 6

System Requirements

TEAM is a Windows Forms application requiring a computer or virtual machine running any version of Microsoft Windows with Microsoft .Net Framework 4.5 or later.

Single Use Computer

If possible, TEAM should be the only application running on the computer. TEAM is Windows Resource and Network intensive. Other applications competing for the same resources may cause performance and stability problems.

Single Login

The computer running TEAM should be set up to allow on one login at a time. When logging out, the windows environment should be set up to allow TEAM to keep running after log off.

Windows ID

TEAM should always be run under the same Windows Id, as some Windows ID schemes create separate file areas for each ID.
The ID must be able to create/read/modify/delete registry settings.
The ID must be able to create/read/modify/delete files in the TEAM_SD folder and all sub folders.

Virus and other Scanning and Update programs.

If a Virus, Update or other scanning program needs to lock files in the folder chosen during the TEAM Install. TEAM should be shut down prior to the scan or update program.
An automated daily shutdown/restart service is provided within TEAM to insure that TEAM is not running when Virus, Update or Backup programs which lock files are running. This service should be used in conjunction with the scheduler built into most Virus, Update and Backup programs to prevent file locking problems that may cause the TEAM database and or shared network resources to be unavailable.

Firewalls

If you use the Scheduled Backup feature
firewalls should be configured to allow TEAM to create/read/modify/delete files in the chosen network folders.

If you use Virtual Com Ports to communicate with SmartLog Testers over a local area network,
firewalls should not prevent TEAM5 or the virtual com port software from sending and receiving data over the network.

Email ID

If your organization uses an integrated Windows/Network/Email login, a specific ESD Email ID should be created for email sent from TEAM. To use the TEAM scheduled email features, your email server must be able to accept SMTP email messages from TEAM.

Contents

Admin
- Admin Password
- Auto Start / Shutdown
- Backup / Restore
- Database
- Departments
- Email
- Export / Import
  - Network Applications
  - Web Monitors
  - Import from Databases
  - Import from Files
  - Export to Databases
  - Export to Files
- Leave Types
- Operator Groups
- Operator Preferences
- Program / Support
- Network Applications
  - Operator Status Application
  - Operator Status Display
  - Operator Admin Application
  - Enroll Application
- Scheduled Reports
- Shifts
- SMS (Text Messaging)
- Support
- System Information
- Time Clock

Alerts
- Operator Alerts
  - ESD Certification Expiring
  - Failed Without Retesting
  - Max Consecutive Failures
  - No ESD Test After Clock In
- SmartLog Alerts
  - Calibration
  - High Fail Percentage
- System Alerts
  - Database Size
  - System

Logs and Reports
- Access Control
- Attendance
- Calibration (SmartLog)
- Certification (Operator)
- ESD Test
- Leave Time
- Time Clock

Statistic Reports
- Operator Compliance
- Operator Pass / Fail %
- SmartLog Pass / Fail %

History Reports
- Operator Change History
- System Logs

Logs - Statistics
- Operator Compliance
- Operator Pass / Fail %
- SmartLog Pass / Fail %

Logs – History
- Operator Change History
- System Logs

Network Monitor
- SmartLog Monitor
- Export / Import Monitor

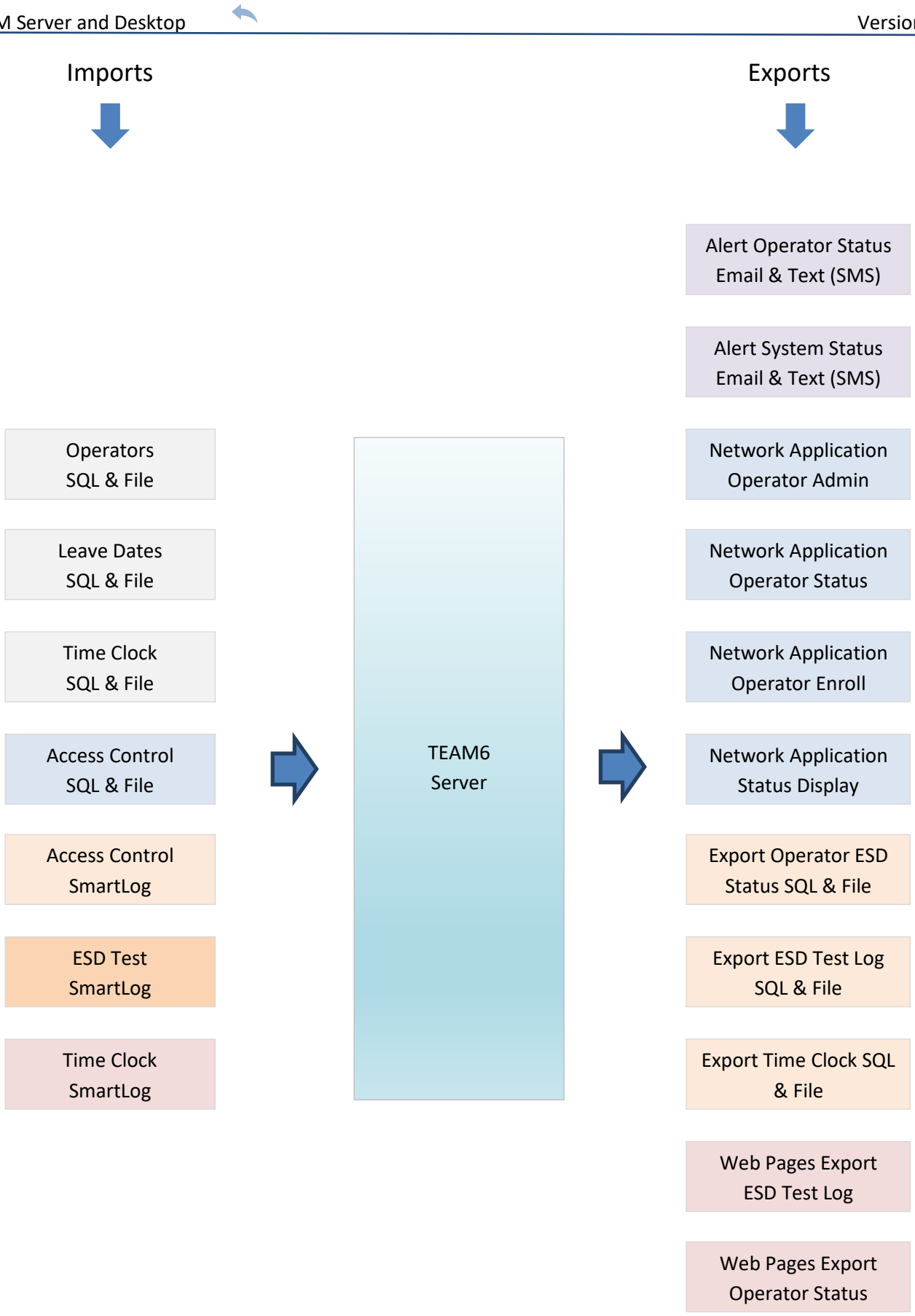
Operator Management
- Operator List
- New Operator
- Multi Operator Update
- Change History
- Remove Operator(s)
- Import Operators (manual)
- Import Operatos (automated)

Operator Status
- Current Status
- History

SmartLog Management
- SmartLog List
- Add SmartLog
- Edit SmartLog
- Calibration Dates
- Update Multiple SmartLogs
- New SmartLog Defaults
- Remove SmartLogs

SmartLog Utilities
- Calculator (Wait Time)
- **Change State**
  - Disable
  - Enable
  - Power Down
  - Restart
- Global Settings
- **ID List Utilities**
  - ID Counts
  - ID Table Delete
  - ID Upload
  - ID Table Download
- **Search Network**
- **Setting Reports**
- Time of Day Synchronization
- **Transaction / Log Downloads**
- **Update SmartLog Settings**
- **Update SmartLog Software**

Standard Menus
- Export
- Data View
- Preferences


Imports
Exports
Operators
SQL & File
Leave Dates
SQL & File
Time Clock
SQL & File
Access Control
SQL & File
Access Control
SmartLog
ESD Test
SmartLog
Time Clock
SmartLog
TEAM6
Server
Alert Operator Status
Email & Text (SMS)
Alert System Status
Email & Text (SMS)
Network Application
Operator Admin
Network Application
Operator Status
Network Application
Operator Enroll
Network Application
Status Display
Export Operator ESD
Status SQL & File
Export ESD Test Log
SQL & File
Export Time Clock SQL
& File
Web Pages Export
ESD Test Log
Web Pages Export
Operator Status

Admin - Admin Password

Access to the TEAM Application may be controlled via a password. This password is called the "Admin Password". When the Admin Password is enabled, the TEAM application reqires password entry on startup.

To Enabled the Password,
- Select the Admin –Admin Password page
- Check the "Enabled Admin Password" box
- Enter a new password, or the previous password.
- Click Save

To Disable Password,
- Select the Admin –Admin Password page
- Uncheck the "Enabled Admin Password" box

If the Admin Password is lost, run the Admin Password Reset application.
The application is located here:
C:\Program Files\TEAM_SD\TEAM_SD_ADMIN_PASSWORD_RESET.exe

Admin - Auto Start / Shutdown

The Auto Start function is enabled; TEAM will automatically start on Windows Startup.

TEAM can be scheduled to shutdown and restart for a period of time on a scheduled basis.
This feature allows TEAM to shutdown when the following program types are run:

- Backup Applications
- Virus Scans
- Windows Updates

To Enabled the Scheduled Shutdown / Restart feature;
- Select the Admin – Auto Start / Shutdown page
- Check the box named “Auto Shutdown Enabled”
- Use the Add / Remove controls to add times and weekdays when shutdowns will occur.

To edit an existing time; click the column you wish to edit on the shutdown schedule grid.
A shutdown time can be temporarily disabled by clicking the Enabled column.
To edit Time of Day, Days, and Duration; click the corresponding column.

Admin - Backup / Restore

The Backup function creates a complete system backup including transactions, operator data and system preferences.

Manual Backup / Restore
To create a backup manually;
- Select the Admin – Backup / Restore page
- Click the Backup button in the Manual Backup / Restore section.
- Select the backup location (Note: It is best to select a location on another computer)
- Select OK to create the backup.

To restore from a previous backup;
- Select the Admin – Backup / Restore page
- Click the Restore button in the Manual Backup / Restore section.
- Select the previously created backup file.

The backup file can be one created manually or during a scheduled backup.

Backup File Names
Manual backup file names contain the date and time the backup was made.
Example:
The backup file "TEAM_SD.sdf.180519225500.backup" was created
On the 19th of May 2018 (180519)
at 10:55:00 PM (225500)

Archive Data
During a scheduled backup older transactions can be automatically be archived in a separate database.
The main purpose of archiving data is to reduce the size of the current database and thus improve / maintain system performance. Data may be manually archived on the Admin – Database page.

On the Admin – Backup / Restore page, in the Scheduled Backup section
A set of controls is provided to enable / disable the automatic archiving of transaction data.

Redundant Backup Files
When a backup file is created, all data, and system settings are contained in the backup Including the transaction history.
Each new backup file is a redundant backup of the previous backup plus all new data.
To reduce the amount of disk space required for backups, redundant backup file an be automatically deleted after a preset number of days.
The Admin – Backup / Restore page, in the Scheduled Backup section a set of controls is provided to control the automatic deleteion of redundant backups.

Admin – Database

The Admin Database page has a set of controls to manage the Operator / Transaction / and setting database.

Compact / Repair Database

The Compact function reduces the database size.
The Repair function attempts to copy all data to a new database.

Archive Data

The Archive data function moves data from the current database to a separate archive database
The main purpose of archiving data is to reduce the size of the current database and thus improve / maintain system performance.

Convert TEAM5 data to TEAM6
The convert function imports data from a TEAM5 database.

Using the convert function, data from TEAM5 can be selectively imported.
Data categories are
Operators
SmartLogs
Transaction data (Access Control, ESD Test, Time Clock)

Admin – Departments

The Admin – Department page allows Operator Departments to be managed.

New Department

- On the Admin – Departments page, click the New Department button.
- Enter a new department name
- Click Save.

The new department will be selected.

Use the controls in the lowe half of the Admin – Departments page to manage Operators and Department Managers.

Delete Department

Each operator is required to be in a department.
When a department is deleted the Operators in the department must be moved to a new department.
Prior to deleting the department, TEAM will automatically prompt the administrator to move Operators to a new department.

Admin – Email

The Admin Email page allows the management of Email Lists, External Email Addresses, and the Outgoing Email Server credentials.

Outgoing Email Enable / Disable

All email sending can be disabled / enabled by checking or unchecking the “Enable Outgoing Email” check box on the Admin – Email page.

Email Lists

Email Lists are used to direct Email Alerts, and Reports to groups of Managers and Operators. An Email List consists of a List Name and one or more Operators.
Controls to manage email Lists are located on the Admin – Email – Lists page.

External Email

External Email addresses are used to direct Email Alerts and Reports to individuals and external email lists not managed by TEAM. Examples are third party IT Support Groups or Company maintained email lists.
Controls to manage external email are located on the Admin – Email – External page.

Email Server

All Email sent by TEAM is directed to a single outgoing email server.
The Admin – Email - Server page has the controls used to manage the location and credentials for the outgoing email server.

Admin - Export / Import

TEAM uses Export / Import functions to synchronize data with external systems.

Operator Status
The Operator Status Application displays current and limited history on each operators ESD Status at a specific Date / Time. This application allows a manager to set Department, Shift and Operator Group Filters to limit the number of operators displayed. Filters are automatically saved for the next use of the application.

The Operator Status application is run from a shared network folder. The Admin – Export / Import Network Applications page contains the controls used to set location and options for this application.

Operator Status Display
The Operator Status Display application is designed to display the status of operators on a large screen in a common area. Filter may be set to control which operators are displayed.
The default status filters are; Failed High, Failed Low and Not Tested.

The Status Display application is run from a shared network folder. The Admin – Export / Import Network Applications page contains the controls used to set location and options for this application.

Operator Admin
The Operator Admin application is used to Add, Deleted and Modify Operators from a shared network location.
The controls on the the Admin – Export / Import Network Applications page allow a limited number of number of administrators to be selected as well as a password for each administrator.
The network location for this application is also selected on this page.

Enroll
The Enroll Application allows new operators to self-enroll in the TEAM system.
The application is run from a network location. A default ESD Test Requirement and Department are assigned to each operator Enrolling via the application.
After Enrolling, the Operator is granted limited access to TEAM ESD Controlled areas.
(More about Enroll)

Web Monitors
The Web monitors are two web pages which are updated on each polling cycle to show the current status of operators, and show a chronologic list of ESD Test Transactions.

The Web Monitors are accessed using a browser from a shared network folder. The Admin – Web Pages page contains the controls used to set location and options for the web pages.

Admin - Export / Import (continued)

Data Import
Data may be imported from External Databases and Files.
Import data can be synchronized on each polling cycle or on a scheduled basis.
The controls necessary to manage an Import Schedule are located here as well.

Import from Databases
Access Control (Facility), Operator, Leave Time and Time Clock information may be imported from third party databases into TEAM.

The information TEAM needs to connect to the external database is located on the Admin – Export / Import – Import from Database pages.
This connection information includes;

DSN - Data is imported via DSN (Data Set Name) pointing to the external database.
Table - A designated table in import database.
ID and Password – (Optional) ID and Password credentials required for access to the external database.

Import from Files
Access Control (Facility), Operator, Leave Time and Time Clock information may be imported from files into TEAM.

The location for import files is found on the Admin – Export / Import – Import from File pages.
This information includes;

Network Location of Import Files
File Delimiter
Selected data to import

Export to Databases

ESD Status, ESD Test Log and Time Clock information may be exported to external databases.

The information TEAM needs to connect to the external database is located on the Admin – Export / Import – Export to Database pages.
This connection information includes;

DSN - Data is imported via DSN (Data Set Name) pointing to the external database.
Table - A designated table in import database.
ID and Password – (Optional) ID and Password credentials required for access to the external database.

Export to Files
ESD Status, ESD Test Log and Time Clock information may be exported to files from TEAM.

The location for export files is found on the Admin – Export / Import – Export to File pages.
This information includes;

Network Location of Import Files
File Delimiter
Selected data to import

Admin - Operator Groups

Operator Groups allow operators to be filtered and sorted on Reports, Web Pages, Export/Imports to and from files and external databases.

Each operator has two groups associated with their profile. By default, the groups are named “Group 1” and “Group 2”. These names can be customized with one or more names.

Example:
Group 1 can be changed to (Assembly, Maintenance, Shipping) to show which management group each Operator is a member of.

Group 2 is independent of Group 1.
Group can contain (Main Campus, Remote Warehouse, and Traveling) to indicate an Operator’s primary location.

Admin - Leave Types

Each operator may be assigned dates indicating they are not working in the ESD Control area.
A leave date may also include a “Leave Type” – a descriptive name like (Military, Personal, Training).

When an Operator has a Leave Date assigned, the ESD Status will show the Leave Type descriptive name.
If an ESD Test is performed on a date already assigned as a Leave Date, the ESD Status will be shown rather than the Leave Type on reports and all other places ESD Status is shown.

Admin – Operators

The Admin - Operators page allows changes to certain attributes for all operators and perform global Operator updates.
These attributes are New Operator Defaults, PIN Requirements.
The Global Operator Update functions are Operator ID Change, Operator ID Login, Link Unknown IDs and Operator PIN Requirements.

New Operator Defaults
When a new Operator is created, the default values shown on the Admin - Operators – New Operators Defaults page.
The values that can be preset for new Operators are;

Required Test
Smock
Hours Until Retest Required
Operator only tests periodically
Department
Shift
Group 1
Group 2
Days until certification expires
Days until PIN change required
Days until ID expires

Operator ID Change
In the TEAM system an Operator's ID should remain consistent. An Operator ID that remains the same during the course of an Operator's term makes audits easier.

In the event that an Operator ID must be changed, Checking the box on the Admin – Operators page in the Operator ID Change section allows Operator IDs to be changed. After changing an Operator ID, it is recommended to uncheck this box to prevent any inadvertent Operator ID changes.

Operator ID Login
By default, Operator may only log in with their Badge ID. To allow all Operators to login via their Operator ID, check the box on the Admin – Operators page, Operator ID Login section. The next time polling is ON, this setting will be sent to all SmartLogs.

Link Unknown IDs

If an Operator performs ESD Test, Access Control or Time Clock functions before their ID is added to the TEAM database, the Operator's personal information can be linked to the transactions by clicking the "Link Now" button on the Admin – Operators page in the Link Unknown IDs section.

Operator PIN Requirements

The Operator PIN section of the Admin – Operator pages allows two PIN options to be set.

Max PIN Retries

When operators are required to enter a pin, this setting limits the number of times an invalid PIN may be entered before the Operator is denied access to all TEAM login screens.

If an Operator is denied access, their PIN retries may be reset via the following;

Operator Edit Page

Remote Admin Application

Admin - Program / Support

The Program / Support page shows Program License, Program Preferences and Support information.

Program Information

The following information is shown on the Admin – Program / Support page, Program Preferences section;

Version
Release Date
License Type
License Expire Date
Workstation ID

Program Preferences

Three Program Options are available on the Program Preferences page;

Time Format – 12/24-hour display format
Temperature Format (Celsius / Fahrenheit)
Support – Contact information for the TEAM Support Group

Admin – Network Applications

There are four Network Applications; Operator Status, Operator Status Display, Operator Admin and Enroll.

The Admin – Network Applications page contains the controls to select the network location for each application. The Network Location contains all program and data files for each application.

It is recommended to select a folder on the same drive as the TEAM program, then map a shared network drive to the local drive. Each application operator can then install a shortcut to the shared drive.

Operator Status Application

The Operator Status Application shows Operator ESD Status, ESD Test Log, and Attendance Log.

Operator ESD Status

The operator status page shows the current status of all operators by default.
Using the Data View – Filter menu the number of operators displayed can be reduced by applying Department, Sift, and Group filters.
The number of operators displayed can be further reduced by applying status filters.
There are

ESD Test Log

By default, the current ESD Status of Operators is shown.

History

To view previous status information, click the “Select Date Range” button.

Filters

Click the filter button to filter the operator list by Department, Shift, and Groups.
These filters will be saved and automatically selected when the application is re-started.

Export

Currently displayed data can be exported to the clipboard, printed, or saved to a file.

Attendance Log

The Attendance Log is a Monthly report showing any activity by an Operator on a given day.
If an ESD Test, Time Clock and Access Control transaction is performed on a given day, the activity will be shown otherwise the daily cell will be empty – indicating the operator was not onsite or perfumed ESD Tests or other transactions during the 24 hour period.

Operator Status Display

The Status Display application shows current ESD Test of each person in the system, or each person on the current shift. This application is intended to be used with a large screen display. The list of Not Tested or Failed users is updated on each polling cycle and the list automatically scrolls when there is more than one page of data.

Operator Admin Application

The Operator Adin application allows users to added, deleted, or modified. Typically, this application is used by the person issuing new test badges to employees and visitors. After enter the new person into the TEAM System via the Remote Admin application, the user may begin testing immediately.

To enable the application, got to the Admin – Network applications page.
In the Operator Admin section;
- Click Enable.
- Select a network location

After enabling, click the Options / Administrator button

The Net Admin Application – Administrators window is displayed.
From this window options for the default operator settings as well as the list of people who are allowed to operate this application are selected.

Enroll Application

The Enroll Application is used to add Operators to the TEAM system.
The application can be used by the person issuing badges or the operator.

The minimum information required to enroll a person is;

First Name
Last Name
Badge Number
Department
Required ESD Test

Middle Name is Optional

Admin

The Admin pages allow various admirative tasks to be performed. Access can be limited with an Amin Password set on the Adin – Admin Password.

Admin Tasks	Description
Auto Start / Shutdown	
Backup / Restore	
Database	
Departments	
Email	
Export / Import	
Group 1 / 2	
Leave Types	
Operators	
Program / Support	
Network Applications	
Scheduled Reports	
Shifts	
SMS (Text messaging)	
System Information	
Time Clock	
Web Pages	

Alerts

Alerts are reports sent via email or text when specific events occur. Some alerts have customizable triggers, preferences that cause the alert to be sent. See the descriptions below for preferences on each alert.

All alerts can be viewed in date/time sequential order on the Alerts – Alert Log page, in the event that TEAM is unable send the alert via email or text.

Alert Name	Description	Triggers
ESD Certification Expiring	Alert is sent when operator's certification nears the expiration date	Days before certification expires
Failed Without Retesting	Alert is sent when an operator fails an ESD test and does not re-test, and pass, within a preset time limit.	Time limit to re-test (minutes)
Max Consecutive Failures	Alert is sent when an operator fails more consecutive ESD tests than a pre-set limit.	Max consecutive ESD test fails
No ESD Test After Clock In	Alert is sent when an operator clocks in but does not pass an ESD test within a preset time limit.	Minutes after clock in for operator to pass ESD test.
Calibration	Alert is sent when a SmartLog's calibration nears expiration.	Days before calibration expiration expires.
High Fail Percentage	Alert is sent when a SmartLog's fail percentage exceeds a preset value.	Max fail percent
Database Size	Alert is sent database exceeds a preset size limit.	Database size limit (gigabytes)
System	System Alerts are sent when TEAM6 is unable complete a system task. Backup Data Export Data Import Network Application Communications SmartLog Communication Virtual License Key Expiring	

Logs and Reports

The Log page is a collection of transaction logs and reports.
The transaction logs are lists of transactions, Access Control, ESD Test and Time Clock, show initially in date/time sequence order. Reports show Operator information such as, Attendance, Certification and Leave Time.
In addition to Operator reports, there are several SmartLog reports including, Calibration, and Pass/ Fail statistics.

To access the Logs and Reports;
- Select the Logs page
- Select the Log or Report from the pages listed on the left.

This is a list of Operator and SmartLog logs and reports.

Log / Report Name	Description
Access Control	Operators granted or denied access to a specific area based on Operator Group, Certification, ESD Test Status, and Code Entry
Attendance	The Attendance Log shows operator attendance on a monthly calendar. The attendance indicator for a given day can be changed to show the number of daily tests performed by the operator.
Calibration	This report shows all SmartLog and the date of the last calibration.
Certification	This report shows all Operators and the date of their last certification.
ESD Test	This log shows a date sequential list of ESD tests performed by operators.
Leave Time	This report shows the leave dates for each operator.
Time Clock	This log shows a date sequential list of Time Clock In/Out/Code entries made by operators.
Operator Compliance	This report shows operator compliance base on a date range, tests per day, and a compliance threshold.
Operator Pass / Fail %	This report sows each operator's pass / fail percentage for a date range
SmartLog Pass / Fail %	This report sows each SmartLog's pass / fail percentage for a date range
Operator Change History	This report shows all changes made to an operator's profile during a date range.
System Logs	This report shows all system events, including application exceptions, during a date range.

Logs and Reports - Date Range Selection

All logs and reports are show for a given period of time.

- Click the Select Date Range button to choose a date range
- Click the Apply button to retrieve data for the selected date range.

Note: The Attendance report is a monthly view of operator's attendance record – Click Select Month to change the reporting period.

Export

The data show in logs and reports may be exported as Files, Emails, Printed Reports or Copied to the Windows clipboard.

To export data - Click the Export button after retrieving data.

Data View

The data sown in each log and report may be Filtered, Sorted and Searched.

To change or locate date in the log or report – Click the Data View button.

Preferences

The preferences menu allows data columns to be shown or hidden, the left most columns to be frozen, and the Badge/Test ID to be sow with or without leading zeros.

To access these preferences – Click the preferences button.

Network Monitor - SmartLog Monitor

The SmartLog Monitor shows the current status of SmartLogs when polling is ON.
When polling is OFF the monitor page shows the last status of each SmartLog when polling was ON.

The monitor shows;

- If the SmartLog is enabled
- Ip Address
- Last Status – On or Offline
- Time of the Last Status
- Transactions Today – The number of transactions downloaded since midnight of the current day.
- Transaction Meter – The number of transaction recorded by the SmartLog
- Last Transaction Time
- ID Count – The number of Operator Badge IDs currently on the SmartLog, if Operator ID login is enabled the column will sow the number of Operator IDs.
- SmartLog Version

Network Monitor - Export / Import Monitor

The Export / Import Monitor shows all import and export processes, their current status (Enabled / Disabled) and the last time the process was run.'

Process Types;

- Network Application Operator Enroll
- Network Application Operator Admin
- Network Application Operator Status
- Network Application ESD Status Display
- Auto Backup
- Scheduled Report Operator ESD Status
- Import from Database Access Control (Facility)
- Import from File Access Control (Facility)
- Export to Database ESD Test Log
- Export to File ESD Test Log
- Import from Database Leave Time
- Import from File Leave Time
- Import from Database Operator
- Import from File Operator
- Export to Database Operator ESD Status
- Export to File Operator ESD Status
- Export to Database Time Clock
- Export to File Time Clock
- Import from Database Time Clock
- Import from File Time Clock
- Web Report ESD Test Log
- Web Report Operator ESD Status

Operator Management - Operator List

The page titled Operators shows a list of current Operators.
The list can be sorted by any column be clicking the column name.
Standard menus as seen on other pages in TEAM6 are Import, Export, Data View and Preferences.

The Manage drop down menu has operations to manage the Operator list.

Operator Management - New Operator

This menu item allows adding of a new Operator.
Minimum required fields are;
First Name, Last Name, Operator ID, Test / Badge ID and Department.
The Operator ID must be unique for each Operator.
All other filed are optional.

Operator Management - Edit Operator
By clicking the check box in the left most column then this meu item, the Operator's information may be edited. All fields may be changed except for Operator ID. To change an Operator ID, go to the Admin – Operators page and check the box Allow Operator IDs to be changed.

Operator Management - Refresh List
This menu item refreshes the operator list in case a background operation has run, like Import Operators, and the list has not automatically refreshed.

Operator Management - Max Badge Length
This menu item allows the Maximum digits in all Operator's badges to be modified. The default is 8 digits. To see other badges properties, go to SmartLog page and click Manage SmartLogs – Edit SmartLog Defaults.

Operator Management - New Operator Defaults
This menu item allows default values to be set if a manual or automated import does not conatin all Operator information.

Operator Management - Multi Operator Update
This menu item allows values for 1 or more Operators to be made at the same time. For example; A number of operators can be re-assigned to a new department.

Operator Management - Change History

Change History Single Operator
This menu item generates a report showing all changes made to an Operator. The list of changes is sorted by date/time of the change along with the old and new values.

Operator Management - Operator List (continued)

Change History All Operators
This menu item is the same as the previous, except multiple Operators are shown one the same report.

Operator Management - Remove Operator(s)
The menu item allows one or more Operators to removed from the current Operator list.
When an Operator is removed, all of their test history is archived for auditing purposes.
The Operator will also be removed from each SmartLog's list of Operators.

Operator Management – Import

Certifications, Leave Time, and Operator Import Functions allows import of data from a text file.

Certification Import
The Certification Import function allows a certification date to be set for one or more operators.
The import file must have two columns separated by CSV or Tab.
The first column is the operator ID.
The second column is the certification date.

To import certification dates, click the Import – Certification button on the Operators tab.
Select the date format, delimiter and file name.
Click the Import File button.
Any import errors are shown in red.
Click Save Data to import all records with status = ok, shown in green.

Leave Time Import
The Leave Time Import function allows leave dates to be imported for one or more operators.
The import file must have three columns separated by CSV or Tab.
The first column is the operator ID.
The second column is the leave date.
The third column is a description of the leave type.

To import leave dates, click the Import – Leave button on the Operators tab.
Select the date format, delimiter and file name.
Click the Import File button.
Any import errors are shown in red.
Click Save Data to import all records with status = ok, shown in green.

Operator Import

The Operator Import function allows one or more Operators to be imported from a file.

To import operators from a file, Select Operators from the Import menu on the Operators tab.

The Import window is displayed and is broken into three sections;
- Import File Column Order
- New Operator Defaults
- Import Preferences

The Import File Column Order shows the order of columns in the import file.
The first six columns are required and the remaining seven are optional.

Required Columns;
- Operator ID – This is a unique ID assigned to each operator. This ID typically does not change.
- Test / Badge ID – This is a unique second ID assigned to each operator. This ID is typically the ID on the operator's identification card or badge.
- First Name
- Last Name
- Middle Name – This may be left blank, but the column is required in the import file.
- Department – Each operator must be assigned to one department.

Optional Columns;
- Shift, Group1 and Group2 - Operators are further classified by Shift and one or two Group designations. These operator classifications are optional in the import file. Like Middle Name, these values may be left blank with only a delimiter between columns.
- If no Shift or Group classifications exist, the additional delimiters are not required in the import file.

New Operator Defaults

During the import process, certain values are assigned to each operator with the New Operator Defaults.
These values are;
- Required Test (ESD Test)
  - No Test Required – This value will open a door or turnstile without performing an ESD test
  - The following ESD test Requirements are self-explanatory;
    - Wrist Only, Footwear Only, Wrist and Footwear, Wrist or Footwear, Footwear with Wrist Optional
  - User Choice – This option allows the Operator to choose which ESD test combination of wrist and footwear will be performed.
- Smock Required – When this option is checked, each operator must perform a smock test.
- Hours until Retest required – The amount of time a Passed ESD is valid or the frequency the operator is required to retest.

New Operator Defaults (Continued)

Dept, Shift, Group1 and Group2 – When these values are selected, each will be applied to import operators if not specified in the import file.

Days until certification expires – The number of from the date of the import until the operator's certification expires. If no date is specified, the value is not populated for each new operator.

Days until PIN changes required – The frequency the operator is required to change their PIN. If no days are specified, operators are not required to change PIN.

Days until ID expires – In the case of temporary operators, this value determines the date the operator login will no longer be valid. If no value is entered, the operator will not be assigned and expiration date.

Import Preferences

In no value is present in the import file, the import process will automatically assign values based on the New Operator Defaults. For a value to be automatically assigned a check box must be present for Dept, Shift, Group1 and Group2.

Maximum ID Length – This value prevents import errors by limiting the Test / Badge ID length.

Import File Delimiter – This is the value used to separate columns in the import file. Tab and Comma separated delimiters are allowed.

Operator Management - Operator List

The Operator List shows all operators currently active in the TEAM6 database.
This list allows operators to be managed (Added, Removed, Updated, Imported) as well as viewing the change history for each operator.

Operator Management - New Operator

To add a new operator, click New Operator from the Manage Operators menu on the Operator tab.
A new operator window is displayed.
The following values are required;
First Name, Last Name, Operator ID, Test / Badge ID and Department.
After entering operator information, click Save.

If any information is invalid, a message box is displayed showing the errors.

If the operator belongs to a category (Dept, Shift, or Group) that is not displayed in the drop-down selections, a new item may be added by clicking the starred blank document icon next to the category.

Operator Management – Edit Operator

An operator may be edited by clicking the operator record or selecting the left most check box and choosing Edit Operator from the Manage Operators menu on the Operators tab.

Operator Management – Refresh List

The operator list may be refreshed by selecting the Refresh List from the Manage Operators menu on the Operators tab. Normally the list will refresh automatically, however it can be refreshed manually if a long background process, like Import Operators from Database, is running.

Operator Management – Max Badge Length

This menu item shows the current max badge length and by selecting this menu item, this setting may be changed.

Operator Management –New Operator Defaults

This menu item displays a window with the default values, prefilled, for new operators. Each of the values can be changed when creating a new operator record. See the New Operator Defaults for details.

Operator Management – (Continued)

Operator Management - Remove Operator(s)

To remove one or more Operators, select the operator(s) by checking the box in the left column,
then click Remove Operator(s) from the Manage Operators menu on the Operator tab.

A confirmation message is displayed showing the number of operators to be removed.
Note: Operator records are preserved in a history table in case an audit of previous operators is required.

Operator Management - Multi Operator Update

This function allows one or more values to be updated on one or more operators at the same time.
To update multiple operators, select the operator(s) by checking the box in the left column,
then click Multi Operator Update from the Manage Operators menu on the Operator tab.

A window is displayed with a number of values that are common to all operators.
In the lower left of this window is the number of operators selected.

Select the value(s) to be updated, then check the box titled Update to the right of the item.
Only values with a checked Update box will be updated.

Click Update Selected Operators.

Operator Management - Change History

To view a list of changes for an operator, select the operator by checking the box in the left column,
then click Change History Single Operator from the Manage Operators menu on the Operator tab.

A window with a chronological list of changes including the old and new values is shown.
This window also allows the narrowing of changes by date range.
Standard Export and Data View function are also provided.

Operator Status

The Operator Status page shows the current, or historical status of all Operators in the TEAM6 database.

Operator Status - Current Status

To display the current status for all operators;
- Select the Operator Status page.
- Click the Current Status button.

To display the status of an operator at a previous time;
- Click the Select Date / Time button
- Select Date and Time
- Click Apply

Each operator is listed with the status as of the time displayed at the top of the list.
The ESD Status column shows a color-coded status with the following values:

Status	Color
Leave Time	Blue
Not Tested	Black
Pass	Green
Fail, Fail Low, Fail High	Red Bold
Calibration Expired	Red
Never Tested	Grey

Operator Status – History

To view the ESD Test history of an operator,
- Select the Operator Status page.
- Click the Current Status button or click Select Date / Time button.

When the operator status list is shown:
- Click the detail row for an operator to view a history of ESD Tests performed by the selected operator.

SmartLogs - SmartLog List

The SmartLog List shows all SmartLog in the TEAM6 database and allows editing or one or more SmartLogs.

SmartLogs - Add SmartLog

Use this function to add a new SmartLog.

To add a new SmartLog;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Add a SmartLog menu item.
- Click Yes to clone settings from and existing SmartLog or No to use New SmartLog defaults.

When the SmartLog Edit window is displayed, make setting edits, then click save.

SmartLogs - Edit SmartLog

This function allows editing the settings on a selected SmartLog.
To edit the settings on a selected SmartLog;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Edit a SmartLog menu item and select a SmartLog

or click the detail row for a SmartLog.
When the SmartLog Edit window is displayed, make setting edits, then click save.

SmartLogs – Calibration Dates

This function allows the Calibration Date to be set on one or more SmartLogs.
To update the Calibration Date on one or more SmartLogs;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Calibration Dates menu item.
- Select or more SmartLogs.

When the Select Calibration Dates window is displayed, select a new calibration date then click Apply.

SmartLogs - Update Multiple SmartLogs

This function allows setting changes to made to one or more SmartLog simultaneously.

To update setting on multiple SmartLogs;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Update Multiple SmartLogs menu item.
- Click Yes to clone settings from and existing SmartLog or No to use New SmartLog defaults.
- Select or more SmartLogs.

When the SmartLog Default Values window is displayed, make changes then click Save.

SmartLogs – New SmartLog Defaults

This function allows editing of the default values used when creating a new SmartLog.

To edit New SmartLog Defaults;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Edit SmartLogs Defaults menu item.
- Click Yes to clone settings from and existing SmartLog
- Select or more SmartLogs.
- Click Yes or No when prompted with the Remove Confirmation or No to edit current settings.

When the SmartLog Default Values window is displayed, make changes then click Save.

SmartLogs – Remove SmartLogs

This function removes one or more SmartLogs.

To remove SmartLogs;
- Select the SmartLog Edit page.
- Select the Manage SmartLogs – Remove SmartLogs menu item.
- Select or more SmartLogs.
- Click Yes or No when prompted with the Remove Confirmation.

SmartLogs – Utilities - Calculator (Wait Time)

The Wait Time Calculator calculates the longest wait time for an Operator base on the number of Operators, number of SmartLogs and the Average Test Time.

To access the calculator;
- Select the SmartLog Edit page.
- Select the Utilities – Calculator (SmartLog Wait Time) menu item.

The Wait Time Calculator window is displayed.
- Enter values for the three parameters, Operators, SmartLogs and the Average Test Time.
- Click Calculate.

SmartLog Utilities – Change State

This set of functions changes the state of one or more SmartLogs.
There are four state functions, Enable, Disable, Power Down and Restart

Enable / Disable
This function disables or re-enables a SmartLog. While a SmartLog is disabled, a message is displayed indicating the SmartLog is disabled until a specific time/date.

By default, the message displayed is Disabled – this message can be changed when the SmartLog is disabled.

To disable one or more SmartLogs;
- Select the SmartLog Edit page.
- Select the Utilities – Change State menu item.
- When the Upload SmartLog window is displayed, select one or more SmartLogs.
- Click Continue

The Disable SmartLog window is displayed.
- Select the time / date to automatically re-enable the SmartLog(s).
- Optionally, enter a message to display while the SmartLog is disabled.
- Click the Disable button.

SmartLog – Utilities – Global Settings

The Global Settings function allows three settings to be managed, Daily SmartLog Restart, Time Format and Temperature Scale.

To access this function;
- Select the SmartLog Edit page.
- Select the Utilities – Global Settings menu item.

The Global SmartLog Settings window is displayed.

Daily SmartLog Restart

When enabled, this function sets a tine of day when the SmartLog will re-start itself.
- Check the box to Enable the function
- Select the restart time

Time Format

Each SmartLog displays the time of day, this function allows the format of time display to be changed from 12 to 24 hour format.

Temperature Scale

Each SmartLog displays the current temperature, this function allow the temperature scale to be toggled between Celsius and Fahrenheit.

SmartLog – Utilities - ID Counts

The ID Count function shows the Badge ID Count and Operator ID Count for one or more SmartLogs.

To access the function;
- Select the SmartLog edit page.
- From the Utilities menu, select the Operator / ID List – ID Counts menu item.
- When the Select SmartLog window is displayed, select one or mor SmartLogs.
- Click Continue

The SmartLog ID Counts window is displayed.
This window shows the number of Badge and Operator IDs.

Operator ID Login
By default, only Badge IDs are stored on the SmartLog to allow login via a badge scan.
When Operator IDs are present on the SmartLog, an Operator may use the keypad to login via their Operator ID.

To allow login via Operator ID;
- Open the SmartLog edit window by clicking a SmartLog detail row on the SmartLog edit page.
- On the SmartLog edit window, select the ID / Badge page.
- In the Login ID Types Allowed section, check the box named Operator ID.
- Click Save

SmartLog – Utilities - ID Table Delete

This function removes the ID table from the selected SmartLog(s).

To access the function;
- Select the SmartLog edit page.
- From the Utilities menu, select the Operator / ID List – ID Table Delete menu item.
- When the Select SmartLog window is displayed, select one or mor SmartLogs.
- Click Continue

When the Confirm Delete window is displayed select Yes to delete the ID tables from one or more SmartLogs.

After ID table is deleted a confirmation message is displayed.

SmartLog – Utilities - ID Upload

This function uploads an ID table to one or more SmartLogs.

To access the function;
- Select the SmartLog edit page.
- From the Utilities menu, select the Operator / ID List – ID Upload menu item.
- When the Upload SmartLog window is displayed, select one or more SmartLogs.
- Click Upload IDs to begin ID Upload \

As ID are uploaded the status displayed in the detail row for each SmartLog.

This function can be used to diagnose problems with long network latency. If the ID Upload process times out, select a longer timeout period by clicking Network Timeout

SmartLogs – Utilities- Search Network

Search by IP Address

This function searches the network by IP Address Range for SmartLogs.

To access this function;
- Select the SmartLog edit page.
- Open the Utilities menu and select Search – by IP Address menu item
- When the Select One SmartLog window is displayed, select one SmartLog.
- Click Continue

The Network Search window is displayed.

Two types of searches are available on this window, SmartLog and Ping

SmartLog Search

The SmartLog search show only devices that respond with a valid SmartLog identification value.
Online is shown for each IP address responding with a valid SmartLog ID.
Timeout is shown for all other IP addresses.

Ping Search

The Ping search shows the result of a (ping <ip address>) command sent across the network.
Timeout is shown if no ping response is received from the IP address.

It is recommended to reserve IP addresses for each SmartLog by it's MAC address. This will prevent other devices from using an IP address assigned to a SmartLog in TEAM6.

Search by MAC address

This function searches the network by IP or MAC addresses. The search window displays the result of the ARP (Address Resolution Protocol) command. The ARP list show all know IP addresses and the corresponding MAC address.

SmartLog – Utilities – Setting Reports

There are three Setting Reports. Compare with SmartLog, Read from SmartLogs and Read from Database.

Compare with SmartLog
This report compares settings between the TEAM Server and the settings read from a SmartLog.

To access this report;
- Select the SmartLog edit page.
- Open the Utilities menu and select the Settings Reports – Compare with SmartLog menu item.
- When the Select One SmartLog window is displayed, select one SmartLog.
- Click Continue

The Compare SmartLog Settings window is displayed showing any differences between the server values and the settings stored on the SmartLog.

Read from SmartLogs
This report reads the settings from each SmartLog and displays them in a list sorted by setting name.

To access this report;
- Select the SmartLog edit page.
- Open the Utilities menu and select the Settings Reports – Read from All or Read from Selected SmartLogs menu item.

Depending on the SmartLogs selected, a report showing each setting for each SmartLog is displayed.

Note: The setting displayed are read from each SmartLog, to show this report with setting read from the TEAM6 database, select the Settings Reports – Read from Database menu item.

SmartLogs – Utilities- Time of Day Synchronization

There are two Time of Day Synchronization methods, NTP and TEAM Server, for SmartLogs.
Each SmartLog can be configured independently.

To access the time settings for a SmartLog;
- Got to the SmartLog Edit Page
- Select one SmartLog by clicking on the SmartLog detail row.
- The SmartLog Edit window is displayed.
- Select the time / Timers page

The two synchronization methods are in Time Synchronization section.

NTP - Network Time Protocol
When this option is chosen, the time of day displayed on the SmartLog is synchronized with the time received from an NTP Server. The IP address or DNS of the NTP server must be entered.

TEAM Server
When this option is chosen, the time of day on the computer running the TEAM6 Server is used to set the time on the selected SmartLog. If the SmartLog is in another time zone from the TEAM6 Server, a Time Offset may be selected or add or subtract a number of hours from the TEAM6 server time.

SmartLogs – Utilities-Downloads

Downloads

The process downloads Transaction, Operator Lists, Diagnostic Logs from a selected SmartLog.
Note: Only transaction not already downloaded and stored in the TEAM6 database are available to download.

Transactions – Access Control, ESD Test, Time Clock

Access Control, ESD Test, and Time Clock transactions are displayed in a list sorted by time of transaction.

To download transactions,
- Select the SmartLog edit page.
- Open the Utilities menu and select the Transaction / Log Downloads – Transaction menu item.
- When the Select One SmartLog window is displayed, select one SmartLog.
- Click Continue

The Transaction History is displayed.
- From the Download Transactions menu, select ESD Tests, Access Control, or Time Clock.

Any transactions, not already download by TEAM6 are downloaded and displayed.

Operator List

To download the Operator List stored on a SmartLog;
- Select the SmartLog edit page.
- Open the Utilities menu and select the Operators / ID – ID Download menu item.
- When the Select One SmartLog window is displayed, select one SmartLog.
- Click Continue
- The Download Data from SmartLog window is displayed.
- Click Download Operator List

The current Operator list will be downloaded and displayed.

Diagnostic Logs

The Logs download process shows a list of transactions not downloaded to the server.
Access Control, ESD Test, and Time Clock transactions are displayed in a list sorted by time of transaction.

To download transactions,
- Select the SmartLog edit page.
- Open the Utilities menu and select the Transaction / Log Downloads – Transaction History menu item.
- When the Select One SmartLog window is displayed, select one SmartLog.
- Click Continue

The Transaction History is displayed.

SmartLogs – Utilities- Update Settings

The Update Settings process synchronizes settings between TEAM Server and SmartLog Pros - Server settings are sent to SmartLogs

To synchronize settings,
- Select the SmartLog edit page.
- Open the Utilities menu and select the Update SmartLog(s) – Settings menu item.
- When the Update SmartLog Settings window is displayed, select one or more SmartLogs.
- Click Update Settings

When synchronize is complete, each SmartLog is re-started.

SmartLogs – Utilities- Update Software

The Update Software process uploads a new version of software to one or more SmartLog Pros.

To upload a new version of software,
- Select the SmartLog edit page.
- Open the Utilities menu and select the Update SmartLog(s) – Software menu item.
- When the Update SmartLog Software window is displayed, select one or more SmartLogs.
- Click Update Software
- When the Select Update File window is selected, navigate to the TEAM_SD folder.
  By default, the TEAM SD folder is C:\Program Files\TEAM_SD
- Select the SmartLog program file, named SLPC.exe

When the upload is complete, each SmartLog is re-started.

Standard Menus – Export

The standard menu shown on the Operator, SmartLog and Report pages allows the displayed data to be exported in a number of ways.

Copy to Clipboard

Selected data will be copied to the Windows clipboard in one of the following formats;

Tab Delimited

CSV comma separated values (spread sheet)

Fixed Column Width

Each of these formats may optionally include the name of the data column.

Email

Selected data will be emailed to one or more email recipients.

An email recipient may or more Email Lists or one or more Individuals.

Print

Selected data will be printed to the selected printer.

Save As

Selected Data will be save to a file in the selected location and selected format.

Formats are;

Tab Delimited – Ready to pasted in a spread sheet

CSV Comma Separated – Comma delimited file with CSV extension – (Excel Default)

Fixed Column Widths – Spaces are added between columns for non-proportionally space fonts.

Standard Menus - Data View

The Data View function allows information to be Filtered, Sorted and Searched.

Filters

The filter window allows filtering of data by up to three columns. Filters remove data form the display the do not match the filter values.

To remove filters, click Clear Filters

Sort

The sort window allows data to be sorted by up to four columns. To clear a custom sort order, click Default Sort.

Search

The search function allows data to be searched by a column and value. After clicking the search button data views will be automatically scrolled to the next found value.

Standard Menus – Preferences

The standard Preference menu varies by the current data view.
These are the common preferences;

Font and Cell Padding
This function allows data to be more readable by changing the font and cell padding (white space between data cells)

Show / Hide Columns
This function allows more or less data to be displayed.

Freeze Column
This function allows a column to be frozen so it and all columns to the left of it will not be scrolled out of view when the horizontal scroll bar is used.