

# **Metrel Cloud Reports User Manual**

*Version 1.1.1*  
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# 1 WebReports description

Cloud-based application WebReports is a tool for preparing and archiving test reports. The application is a part of the Metrel Ecosystem platform.

The tool enables the creation of customized reports suited to personal or company demands.

Different pre-defined templates are offered by Metrel for an easy start. They can be used as-is or modified and used as personal templates.

A big advantage is that new templates can be created from scratch in Microsoft Word.

A test report consists of:

- The Word template.
- User data filled into the template.
- Measurement data obtained from \*.padfx project files.

The same data can be presented in very different forms.

The WebReports application is connected to Metrel Cloud. All files (templates, drafts, test data, reports) are stored in Metrel Cloud by default. The user will benefit from all advantages of Metrel Cloud (safe storage place, sharing options, security, access from any location or device ...)

Access to the WebReports is possible through:

- A dedicated interface in MESM.
- Internet browser.

## 1.1. Security

WebReports are running on the Azure cloud platform, which guarantees the highest safety standards. The main advantages are:

- Remote physical location
- Automatic backups
- Authentication upon registration and signing-in
- Document history saving

## 1.2. System Requirements

For Accessing Metrel cloud services via the web interface:

- Actively supported Microsoft Windows operating systems.
- Modern web browser (Tested on Microsoft Edge, Google Chrome, and Mozilla Firefox).
- Other operating systems are supported (Linux, MacOS), but not tested.

## 2 Registration and sign-in

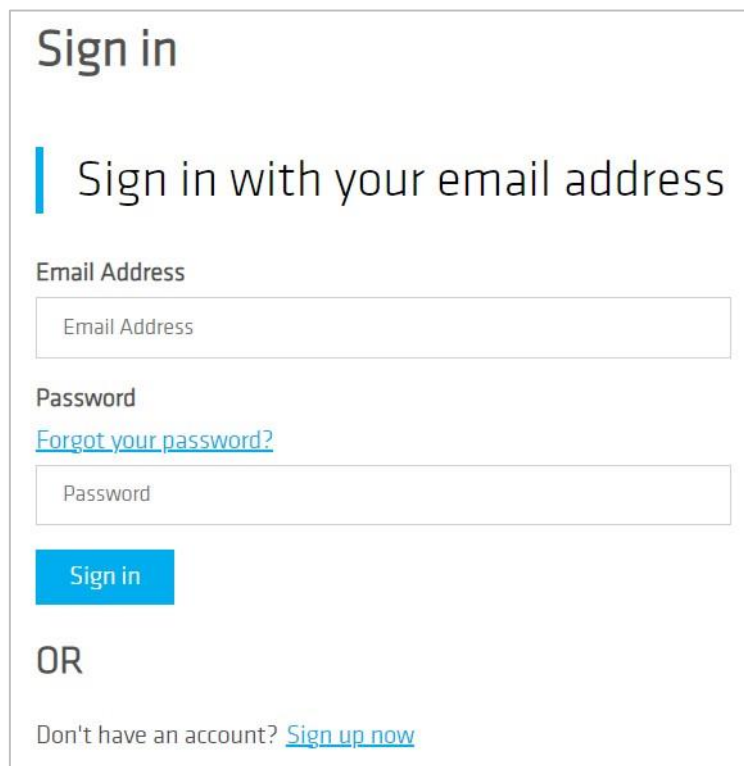
### 2.1. First use (registration)

WebReports uses the same user repository as Metrel Cloud. Before first use, the new user must first register a Metrel Cloud account and enter the WebReports License key to the Cloud account. See Metrel Cloud User Manual for more information about Cloud account registration and Licence key entry.

### 2.2. Sign in with a registered User Account

Users can visit <https://wr.metrel-cloud.com/> and sign in with existing Metrel Cloud account credentials:

- Email address
- Password



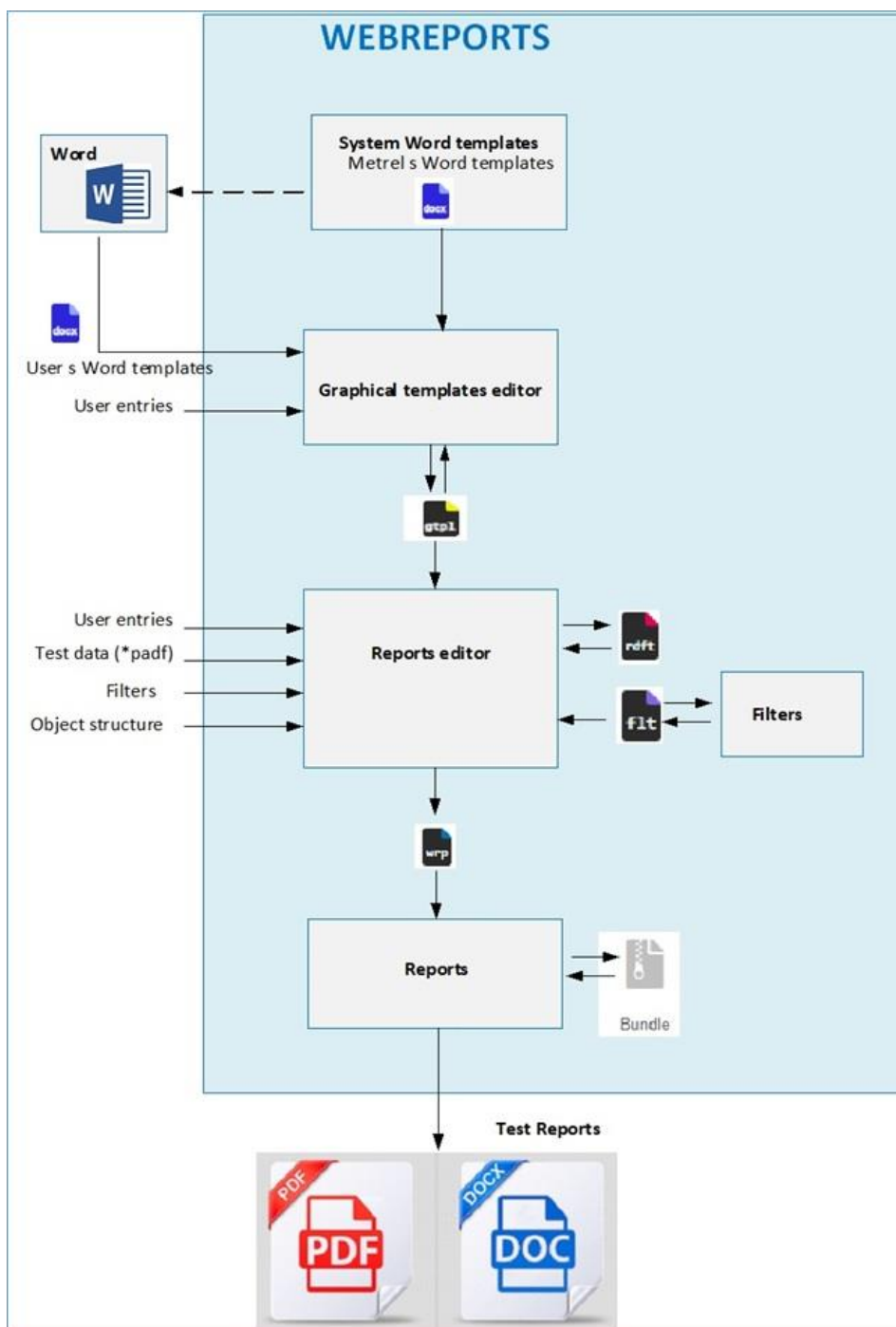
The screenshot shows a 'Sign in' form with the following elements:

- Sign in** (Section Header)
- Sign in with your email address** (Instructional text)
- Email Address** (Label) with an input field containing the placeholder text 'Email Address'.
- Password** (Label) with an input field containing the placeholder text 'Password'.
- [Forgot your password?](#) (Link)
- Sign in** (Blue button)
- OR** (Text separator)
- Don't have an account? [Sign up now](#) (Link)

### 3 WebReports main elements

The complete test report generated from the WebReports application consists of the following elements, presented graphically in the figure below:

- Word templates
- Graphical templates
- Report drafts
- Filters
- Reports



### 3.1. Word templates

The Word template is a Microsoft Word document that defines the following content of the report:

- The design of the report.
- Positions and type of user entries.
- Positions where project data from \*.padfx file are shown.

Word templates are prepared in Microsoft Word. A selection of different templates is offered by Metrel by default, they are called the System Word templates.

### 3.2. Graphical templates

The graphical template is a file (\*.gtpl) based on a word template with filled-in user entries. The user entries are filled in with Graphical Templates Editor.

If the same data is often used (addresses, company data, logos, long checklists,..) the user can save them to a separate graphical template and avoid re-entering them for each report.

### 3.3. Report drafts

The report draft is a file (\*.rdft) based on a graphical template and filled with test data from the Test project file (\*.padfx).

The extent of project data can be limited by using filters and the exclusion of test structure objects.

In the Reports Editor, the final version of the Test report is prepared and can be saved as a Report file (\*.wrp).

### 3.4. Filters

Often not all Test project data need to be shown in the report. Filters are used to exclude redundant data from the report. The settings can be stored in a file (\*.flt) and used anytime later.

### 3.5. Reports

The reports menu provides commands for the export of test reports in pdf format or docx format.

## 4 Home menu

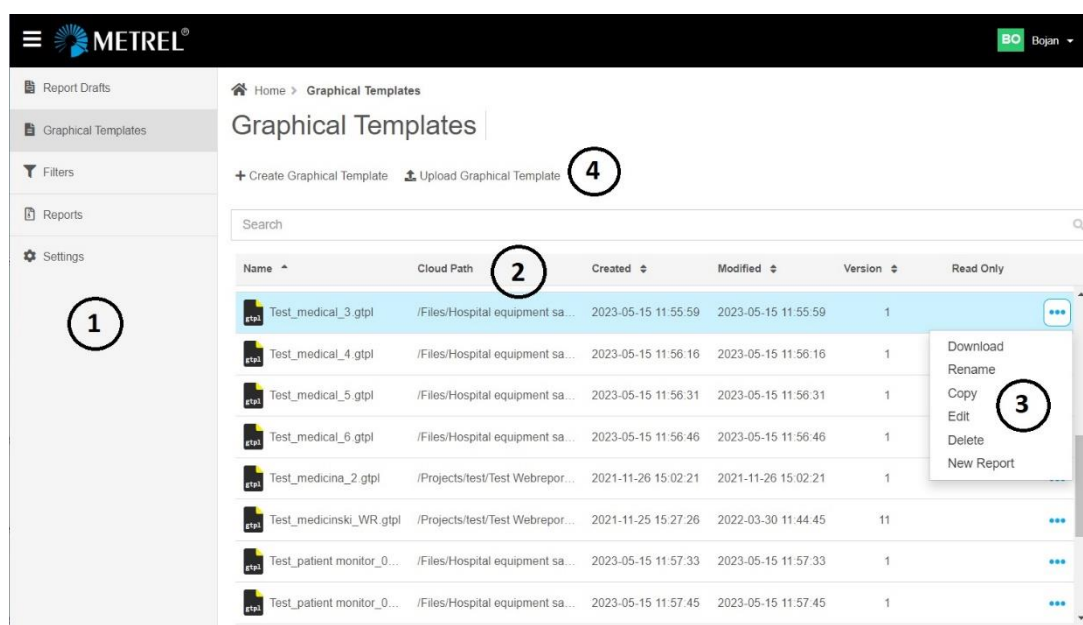
### 4.1. User profile data / signing out



The username is shown. The only option in the drop-down menu is signing out.

The user account is shared with Metrel Cloud. Review and changes to the user profile data are only possible in Metrel Cloud. They will be automatically adapted to the WebReports application.

### 4.2. File management




1 The WebReports files are organized in different lists:

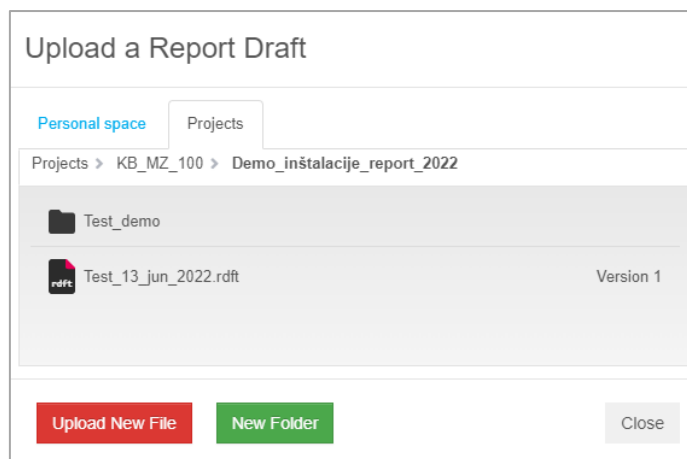
- Report Drafts
- Graphical Templates
- Filters
- Reports
- Settings – Report generating language selection


2 The default storage location for WebReports files is Metrel Cloud. For more information about options for data storage see Metrel Cloud user manual. A file stored in Cloud can be selected and opened from the list in WebReports.

3 Standard commands for managing files.

4 Commands for upload from other location than Cloud:

 **Upload**: Button on top of the file list for adding files. Opens a dialog window with additional options.



 **Upload New File**: Select to upload a new file.



## 5 Word templates

Word templates consist of two parts:

- the fixed form (design) prepared in Word.
- Information about the type and position of user entries and project data, defined with tags.

An example of a Word template is shown in the figure below. Tags are marked blue.

### Demo test report

In accordance with ### Enter name of relevant organisation ###

#### General data

General data	
Client: <span style="color: blue;">### ML Client name and address ###</span>	Contractor: <span style="color: blue;">### ML Contractor name and address ###</span>
Installation: <span style="color: blue;">### ML Installation ###</span>	
Report covers: <span style="color: blue;">### TC-1 " New installation" ###</span> <span style="color: blue;">### TC-2 " Periodic test" ###</span> <span style="color: blue;">### TC-3 " Repair" ###</span>	Testing in accordance with: <span style="color: blue;">### TC-4 " Extension" ###</span> <span style="color: blue;">### TC-5 " Change" ###</span> <span style="color: blue;">### TC-6 ### text ticker 6###</span>
Client's representative: <span style="color: blue;">### ML Client representative name and address ###</span>	Inspector: <span style="color: blue;">### ML Inspector name and address ###</span>
Earthing system: <span style="color: blue;">### TC-20"TN-C" ###</span>	<span style="color: blue;">### TC-21" TN-C-S" ###</span>
Mains: <span style="color: blue;">### Mains ###</span>	Public utility: <span style="color: blue;">### Public utility ###</span>

Location: <span style="color: blue;">###Location (report client)###</span>	Location: <span style="color: blue;">###Location (report operator)###</span>
<span style="color: blue;">###"Date:" DT-1###</span>	<span style="color: blue;">###"Date:" DT-2###</span>
Signature: <span style="color: blue;">###Client name signature###</span>	Signature: <span style="color: blue;">###Operator name signature###</span>

### MEASUREMENTS ###

### 5.1. Tags

Tags contain:

- Definition of user entries and project data (from \*.pdfx files) in the report
- Information where the entries/data will be placed on the report

**Note**

The definitions and syntax rules must be strictly followed. Otherwise, the tag will not be correctly interpreted by the WebReports application.

WebReports editors offer previews for easier troubleshooting in case of problems.

**5.1.1. System tags**

System tags define which data from the selected project file (\*.padfx) will be shown in the report (measurement results, list of instruments used, object structure, attachments).

The extent and style of presentation of data are set later in the process – in the Report editor.

Tag	Description
### MEASUREMENTS ### ### S-MS ###	Indicates where measurement results will be placed.
### DATAFIELD### ### S-DF ###	Out of the scope of this document
###ATTACHMENTS### ### S-AT ###	Indicates where attachments will be placed. Standard image and simple text formats are supported.
###STRUCTURE### ### S-ST ###	Indicates where the object tree structure will be placed.
###COMMENTS### ### S-CM ###	Indicates where comments will be placed.
###INSTRUMENTS### ### S-IN ###	Indicates where instruments data will be placed.

**5.1.2. Text tags**

Tag	Description
###anytext###	Stands for a single-line text entry. In the User Inputs window in editors, a text box 'any text' will appear.
###ML anytext###	'ML' stands for multi-line text. In the User Inputs window in editors, a multi-line text box 'any text' will appear.

Note:

The syntax must be strictly adhered to.

### 5.1.3. Date tags:

Date tags define date entries in the report.

Tag	Description
###DATE 1### ###DT 1###	DATE 1, DT-1 stands for a date entry. In the Data Fields window in editors, a box 'DATE 1' will appear.
###" Next date:" DATE 2###	A name can be added to the date tag. DATE 2 stands for a date entry. In the Data Fields window in editors, a box 'Next date' will appear. 'Next date' will be shown on the report too.

### 5.1.4. Dropdown list tag:

Dropdown tags define dropdown lists in the report.

Tag	Description
###DD 1'Pass;Fail;-###	DD 1 stands for the dropdown list. In the Data Fields window in editors, a dropdown box 'DD 1' will appear. 'Pass; Fail;- ' stand for drop-down menu items.
###"Menu name:"DD 2'Pass;Fail;-###	A name can be added to the tag. DD 2 stands for a dropdown list. In the Data Fields window in editors, a dropdown box 'Menu name' will appear. 'Pass; Fail;- ' stand for drop-down menu items. 'Menu name' will be shown on the report too.

### 5.1.5. Ticker tag:

Ticker tags define tickers in the report.

Tag	Description
###TC 1### ###TICKER 2###	TC 1, TICKER 2 stand for tickers. In the Data Fields window in editors, a ticker box TC 1 or TICKER 2 will appear.
###"Ready for use " TICKER 3###	A name can be added to the ticker. TICKER 3 stands for tickers. In the Data Fields window in editors, a ticker box

	'Ready for use' will appear. 'Ready for use' will be shown in the report too.
--	--

### 5.1.6. Image tags

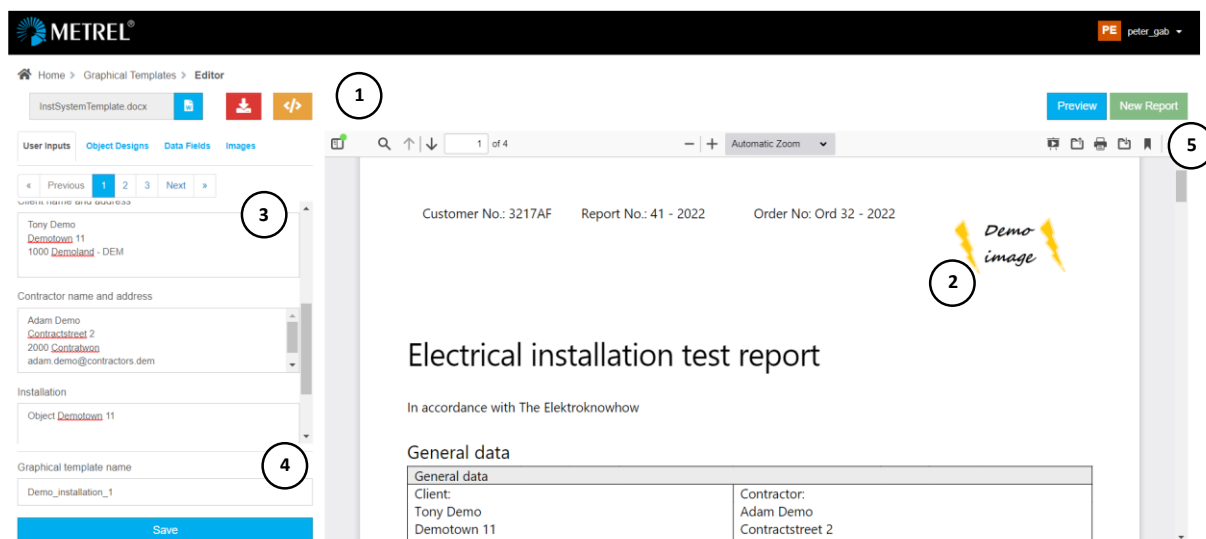
Image tags define the size of the images in the report.

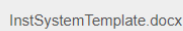
Field	Description
### IMAGE-1 ### ### IM-1 ###	Insert the original size image.
### IMAGE-1_300_200 ### ### IM-1_300_200 ###	Insert an image resized to 300x200 px.
### IMAGE-1_300_x ### ### IM-1_300_x ###	Insert an image, horizontally resized to 300 px and vertically resized for the same factor.
### IMAGE-1_x_200 ### ### IM-1_x_200 ###	Insert an image, vertically resized to 200 px and horizontally resized for the same factor.

## 6 Graphical templates editor

In this menu, the user can select a Word template and fill in the user entries.


The updated document can be saved as a graphical template (\*.gtpl) file.



1  The field for selecting and opening the Word templates.

 Preview of the graphical template without user entries (same as Word template).

 Preview of the graphical template with user entries.

 Download the Word template.


2 Graphical Template Viewer.


In Graphical Template Viewer there are options for:


- adjusting the view of the content
- making copies/printouts of the temporary content

3 Data entry fields

- User inputs: for adding text user data.
- Object designs: for selection of templates of project data.
- Data fields: for selection of tickers, options from drop-down menus, and dates.
- Images: for uploading and adding images.

4  Save (or Save as) the graphical template to Cloud.

5  Preview the changes in the user input fields in the Viewer.

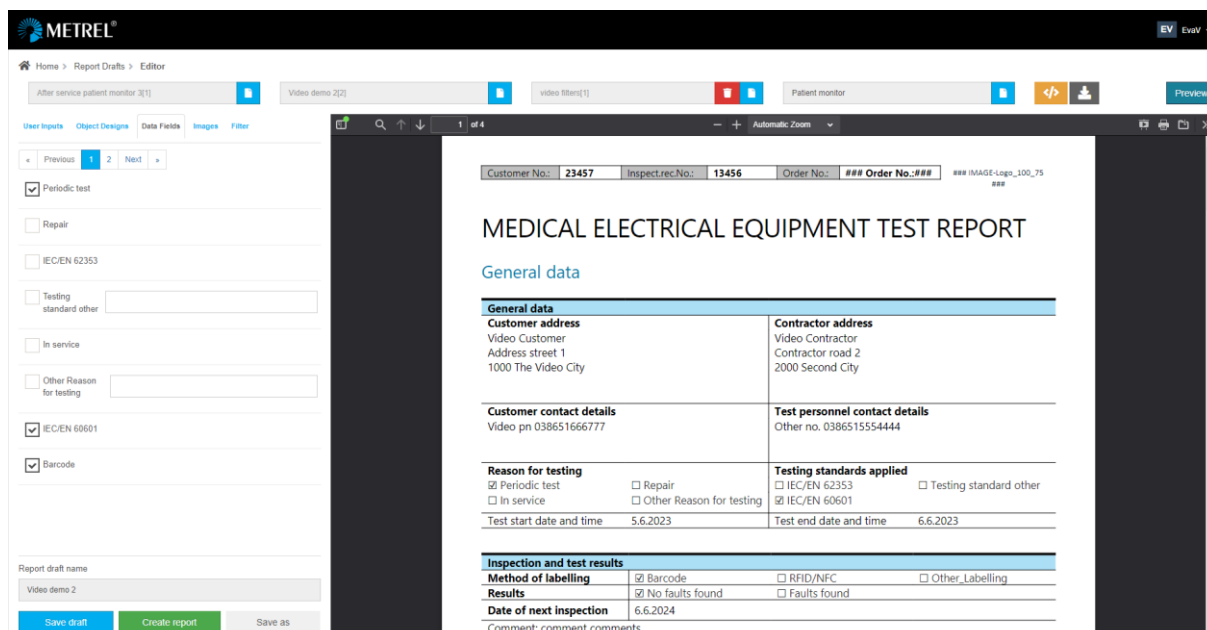
 Proceeds to Report editor – the next step in making a test report.

# 7 Reports editor

The reports editor is the main editor for creating test reports. The user can:

- select a graphical template
- modify user entries
- add project data (\*.padfx file)
- define the style and extent of showing project data
- limit the extent of shown project data with filters.
- limit the extent of shown project data by selecting structure objects

The document can be saved as a report draft (\*.rdft file), or created into the final report.



- PAFX file Opens Project file (.padfx) selection window.
  - ME gr temp 01[2] .Opens Graphical template selection window.
  - Filter Opens Filter file selection window.
  - Structure object Opens Structure objects window.
  - Preview report draft without entries (the original Word template).
  - Download the temporary report draft.

- Report draft Viewer

In Report Draft Viewer there are additional standard options for:

  - adjusting the view of the content
  - make copies/printouts of the temporary content

Preview


Preview

3


## Data entry fields

- User inputs: to add texts
- Object designs: to select templates for showing test data
- Data fields: to select tickers, options from drop-down menus, dates
- Images: to upload and add images

4

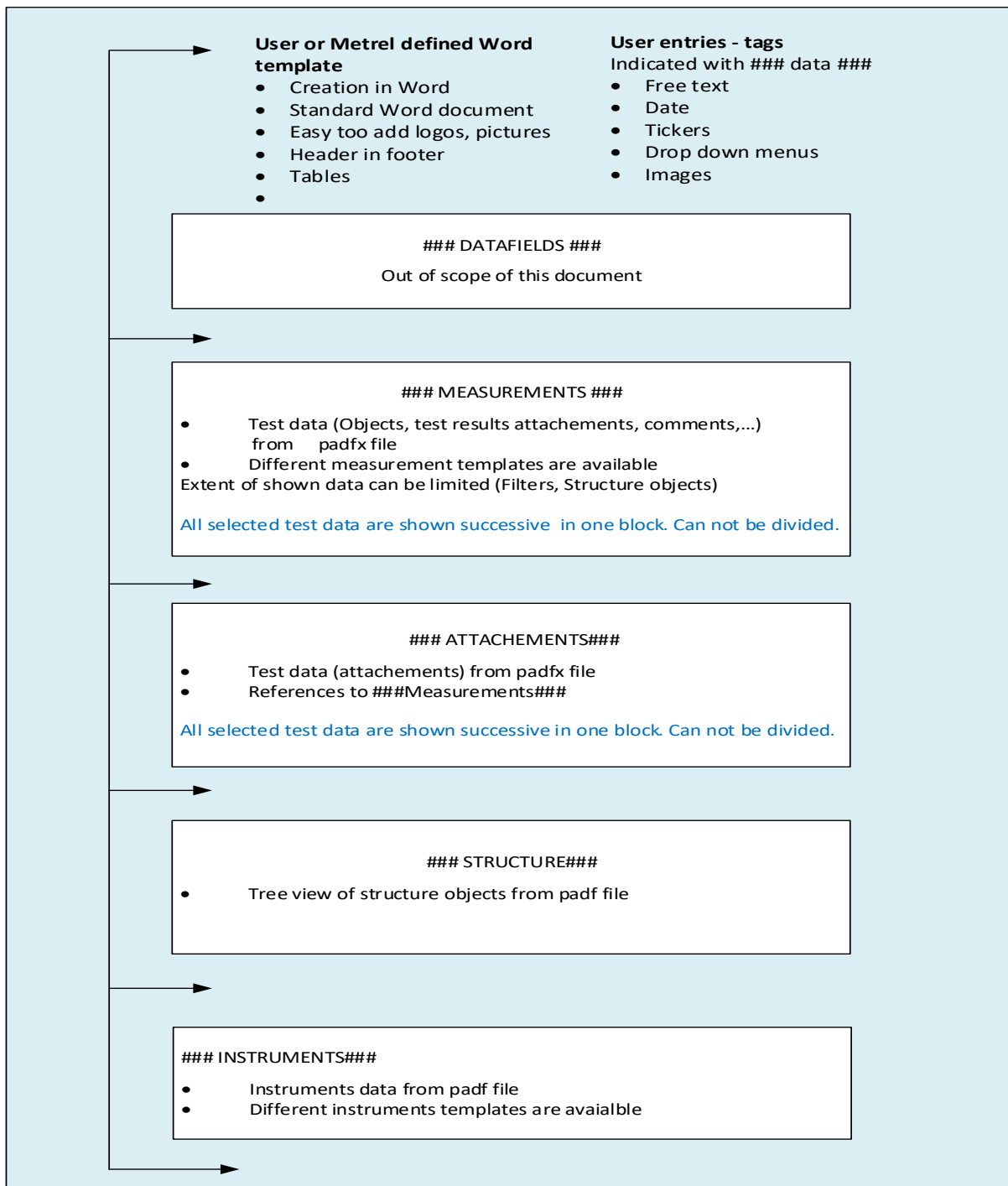
Save draft

Save report draft to Cloud

Create report

Save as the final report

The elements of the report draft are shown in the figure below.



## 7.1. Object designs

Content and project data can be presented in different ways. Users can select among different templates (\*.docx):

- Measurement templates – presentation of structure objects and test data
- Instrument templates – presentation of used instruments data
- Tables template – presentation of data tables.

In the figure below are examples of the same project data and two different measurement templates.



Customer-No.:	CN-001	Inspect.-rec.-No.:	IN-001	Order-No.:	ON-001
<b>ELECTRICAL-EQUIPMENT-TEST-REPORT</b>					
Node/Room1/2345001224					
Appliance-ID#	Name#	Test-Date#	Retest-Period#	Next-Test#	
2345001224#	Iron#	16.02.2018#	12#	16.02.2022#	
AS-Name#	AS-Date#	User#	Test-instrument#	Test-status#	
Class:1-appliance#	16.1.2022-13:59:59#	#	Sn.:17240081.;MI-3360#	Fail-#	
Node/Room1/00001414					
Appliance-ID#	Name#	Test-Date#	Retest-Period#	Next-Test#	
00001414#	TV#	15.03.2022#	12#	15.03.2022#	
AS-Name#	AS-Date#	User#	Test-instrument#	Test-status#	

Measurements Template = PATSimpleList.docx

Customer No.:	CN-001	Inspect. rec. No.:	IN-001	Order No.:	ON-001
<b>ELECTRICAL EQUIPMENT TEST REPORT</b>					
Node/Room1/2345001224					
<b>Class 1 appliance</b>					
APPLIANCE ID:	2345001224	EQUIP. USER:		TEST DATE:	16.02.2022
NAME:	Iron	LOCATION:		RETEST PER. (M):	3
INVENTORY NO.		COMMENT:			
MEASUREMENT	USER	COMMENT	Status		
Continuity	Tony Seeman		Empty		
Continuity	Tony Seeman		Empty		
R iso	Tony Seeman		Empty		
Functional	Tony Seeman		Empty		
Class I visual inspection			Fail		
Picture:					
Node/Room1/00001414					
<b>Class 2 appliance</b>					
APPLIANCE ID:	00001414	EQUIP. USER:		TEST DATE:	15.03.2021

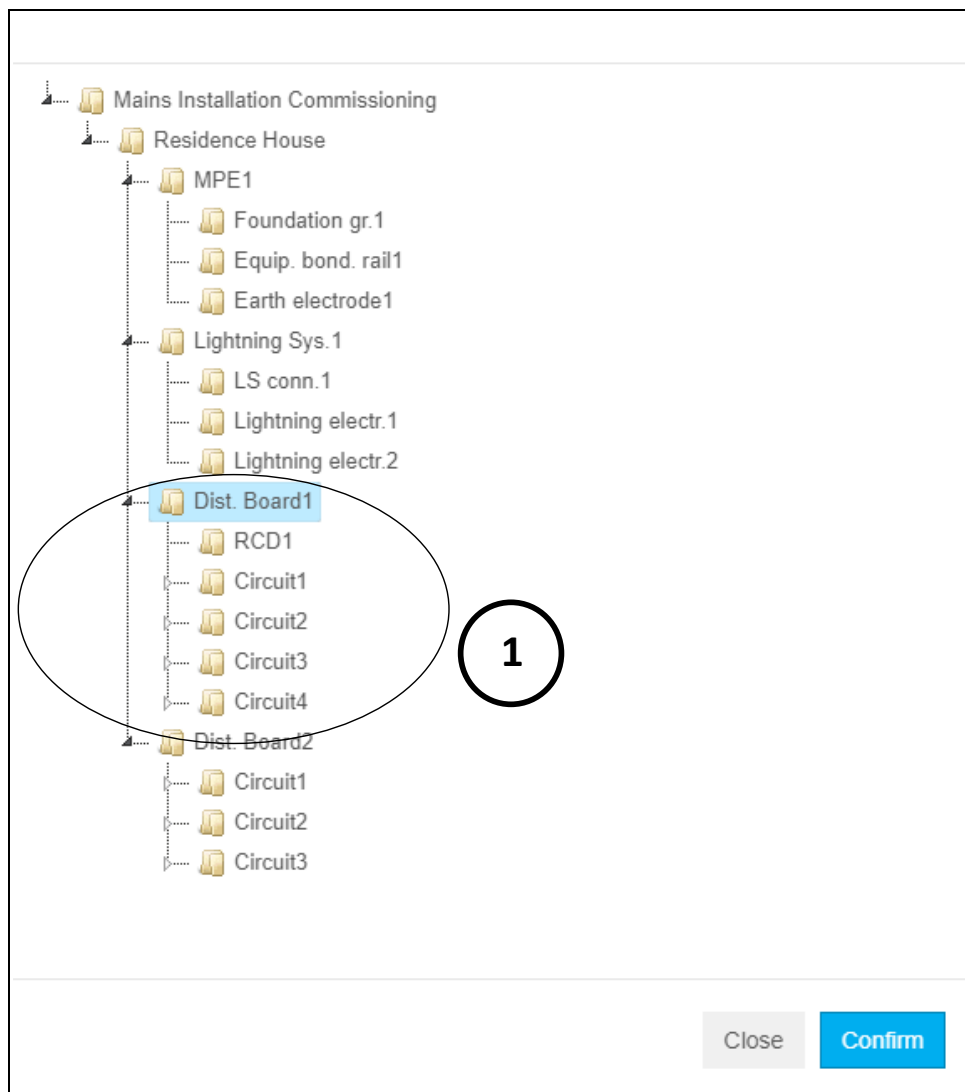
Measurements Template = PATSimpleListWithImages.docx



## 7.2. Structure object

It is possible to limit the number of structure objects shown in the project.

Procedure to limit the number of structure objects shown:

-  Open Structure objects window
- Select the structure object in the tree and confirm



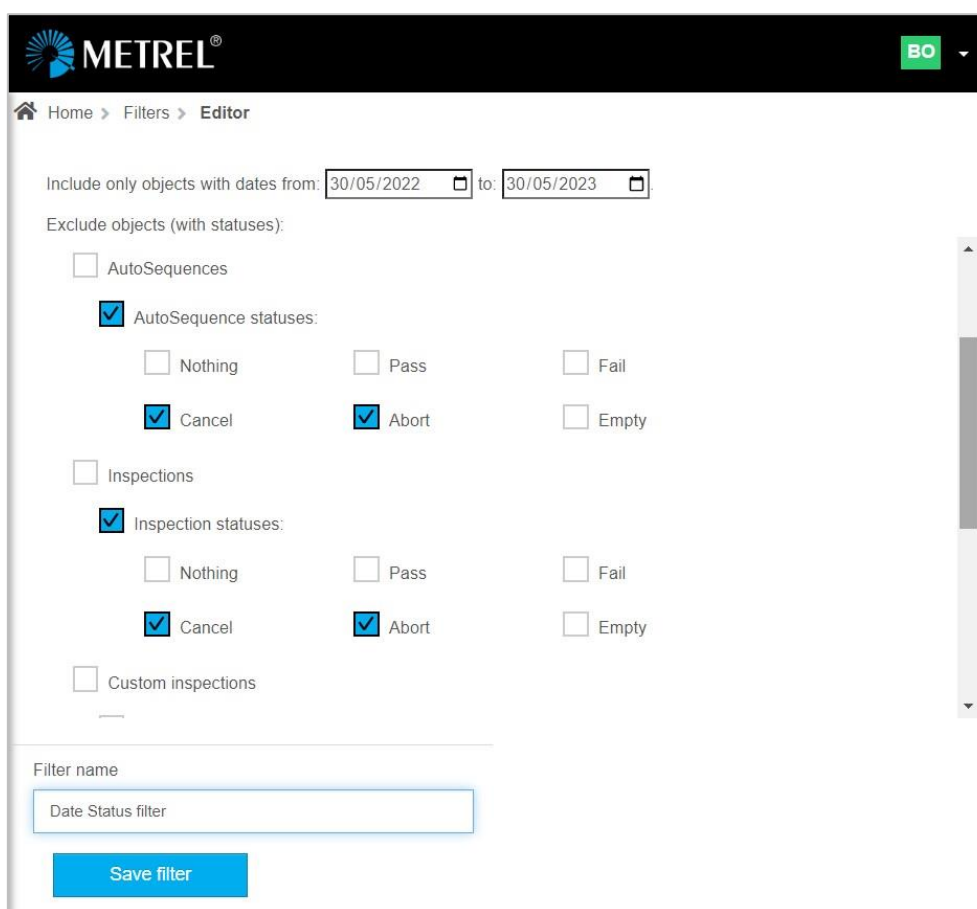
- **1**. Selected a structure object and its child objects will be shown in the report.
- : The name of the selected structure object is shown
-  Set back the highest structure object in the tree.

## 8 Filters

### 8.1. Filters editor

Filters are intended to exclude data in the project file (\*.padfx) that do not need to be presented in Test Report.

Filter editor provides a list of all available filters. The list can be edited, select the checkbox to exclude unnecessary data, and set dates to limit the period of data to be included in the report.

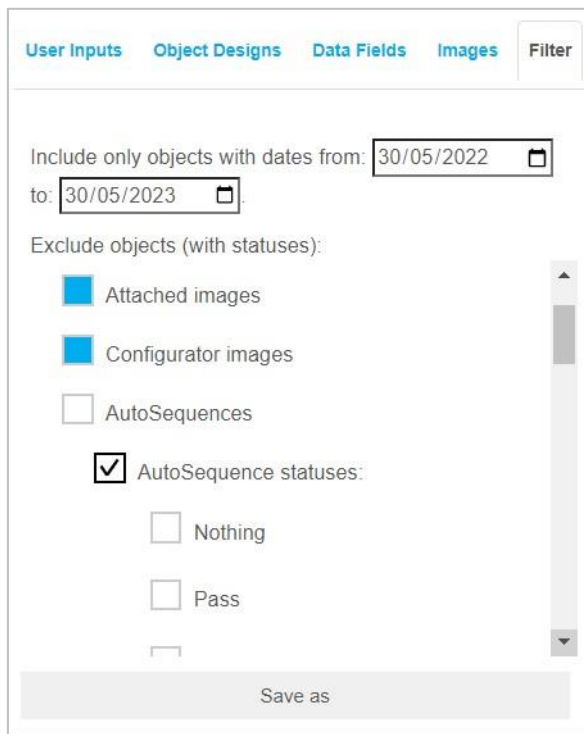


The screenshot shows the METREL Filters editor interface. At the top, there is a navigation bar with the METREL logo and a user profile icon labeled 'BO'. Below the navigation bar, the breadcrumb path is 'Home > Filters > Editor'. The main content area includes a date range selector: 'Include only objects with dates from: 30/05/2022 to: 30/05/2023'. Underneath, there is a section for 'Exclude objects (with statuses):'. This section contains three main categories: 'AutoSequences', 'Inspections', and 'Custom inspections'. Each category has a checkbox to toggle it on or off. For 'AutoSequences' and 'Inspections', there are sub-sections for 'AutoSequence statuses' and 'Inspection statuses' respectively, each with checkboxes for 'Nothing', 'Pass', 'Fail', 'Cancel', 'Abort', and 'Empty'. The 'Date Status filter' is currently selected. At the bottom, there is a text input field for 'Filter name' containing 'Date Status filter' and a blue 'Save filter' button.

After appropriate settings are done the user can define the Filter name and Save it in Cloud storage as a (\*.flt) file. Different filters can be set, saved, and used later when preparing test reports.

## 8.2. Filters in the Report Editor

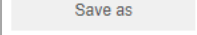
The Report Editor provides a tool for setting the Report data Filter or modifying the Filter selected from Cloud storage.



The screenshot shows the 'Filter' tab in the 'Filters editor'. It features a navigation bar with 'User Inputs', 'Object Designs', 'Data Fields', 'Images', and 'Filter'. The main area contains the following settings:

- 'Include only objects with dates from:' with a date input field set to '30/05/2022' and a calendar icon.
- 'to:' with a date input field set to '30/05/2023' and a calendar icon.
- 'Exclude objects (with statuses):' section with a vertical scrollbar on the right.
- Four checkboxes for exclusion: 'Attached images' (checked), 'Configurator images' (checked), 'AutoSequences' (unchecked), and 'AutoSequence statuses:' (checked).
- Under 'AutoSequence statuses:', there are three sub-options: 'Nothing' (unchecked), 'Pass' (unchecked), and an empty checkbox (unchecked).
- A 'Save as' button is located at the bottom of the form.




The set filter parameters or made changes to the selected Filter will be considered in the current report only, the content of the selected Filter will not change.

Set filter or changes of selected Filter can be saved with the  command. Changed settings are stored as a new Filter file.

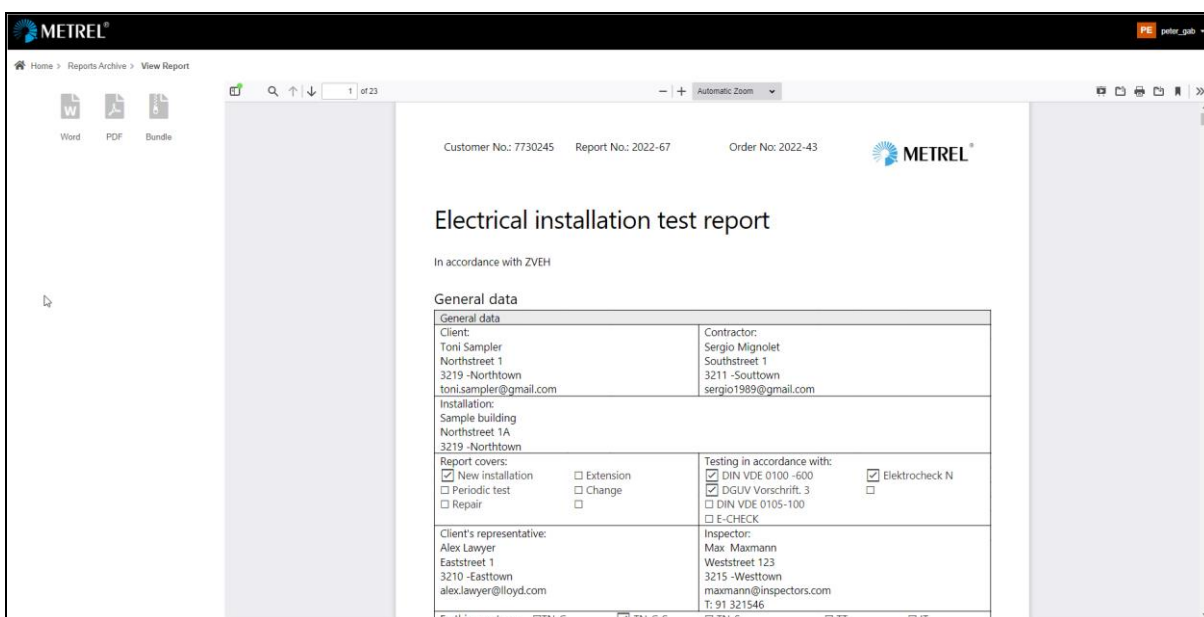
## 9 Reports and View report menu

Once a report draft is finished, the user can save the report as final report on Cloud in a \*.wrp file.

By selecting the Report \*.wrp file, the View Report menu is opened with the following main options:

-  Export the report in Word format.
-  Export the report in pdf format.
-  Export the \*.wrp file.

The preview removes any unfilled tags and gives an accurate presentation of the final report.



The screenshot shows the METREL web interface for viewing a report. The report title is 'Electrical installation test report' and it is in accordance with ZVEH. The report covers general data, client information, contractor information, installation details, report covers, and testing in accordance with standards.

General data	
<b>Client:</b> Toni Sampler Northstreet 1 3219 -Northtown toni.sampler@gmail.com	<b>Contractor:</b> Sergio Mignolet Southstreet 1 3211 -Souttown sergio1989@gmail.com
<b>Installation:</b> Sample building Northstreet 1A 3219 -Northtown	
<b>Report covers:</b> <input checked="" type="checkbox"/> New installation <input type="checkbox"/> Periodic test <input type="checkbox"/> Repair	<input type="checkbox"/> Extension <input type="checkbox"/> Change <input type="checkbox"/>
<b>Client's representative:</b> Alex Lawyer Eaststreet 1 3210 -Easttown alex.lawyer@lloyd.com	<b>Testing in accordance with:</b> <input checked="" type="checkbox"/> DIN VDE 0100 -600 <input checked="" type="checkbox"/> DGUV Vorschrift. 3 <input type="checkbox"/> DIN VDE 0105-100 <input type="checkbox"/> E-CHECK
<b>Inspector:</b> Max Maxmann Weststreet 123 3215 -Westtown maxmann@inspectors.com T: 91 321546	

View Reports window offers additional standard option commands for working with files:

- Toggle sidebar (document contains outline/attachments/layers)
- Find in the document
- Adjusting the view of the content (zoom, presentation, rotate, scroll, select...)
- Make copies/printouts of the content (print, download)
- Open file (browser to navigate to other locations than the Cloud).