LABORATORY MANAGEMENT SOFTWARE USER GUIDE

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Introduction

General Overview

ProCal-Track is an easy to use Windows™ based program which is used to monitor and control information on instruments and equipment that are calibrated or serviced by a calibration laboratory.

Full records on calibration and service histories can be kept together with the age, cost, owner status etc.
This program will save time on filing, sorting and retrieving paper records by having all necessary Calibration Information in one place.

Job control: The software can be used to keep track of the progress of a job in the calibration process from the moment the instrument is booked in, to the point of despatch, this can greatly reduce the time wasted looking for paper work and enables the current status of the laboratory's work load, or an individual job's condition to be viewed almost instantaneously on a PC's screen negating the need for a paper based system.

Integration with ProCal: If ProCal is used to perform calibrations, the status of instruments as they are tested will be automatically available in ProCal-Track. The two programs together provide an efficient workflow for a calibration laboratory. Also if the software is made accessible to the network, then information can be accessed from any computer terminal within the company/laboratory.

Structured approach to job control reduces the chance of mistakes and helps with quality approvals.

A Searchable database with a wide range of reports provides access to job histories, allows searches for specific groups such as calibration recall letters and certificates etc.

Microsoft Access database formats are used by the software ensuring compatibility and secure storage of information.

Networked information can be readily available anywhere from the office to the calibration laboratory.

Recall Letters and over due calibration notices can be viewed as a list with comments or printed out for direct posting in windowed envelopes.

Crystal Reports is a piece of software that is used to edit the report and certificate templates used by ProCal-Track. This software is not provided by Transmille and is not needed to use the preset templates; it's only used to edit templates. Crystal Reports if purchased only needs to have one licence for the workstation used to edit the templates not for every machine that uses the templates.

Menus provide access to the common tasks:

New instrument to be added to the database.
Instrument data to be edited.
Delete instruments from the system.
List or print out data from specified groups.
Show jobs in progress status.
View calibration due with comments, and option to print recall letters.

View or print calibrations performed.
Record an instrument in for calibration, & print a 'Goods in' label.
Print job complete paperwork for accounts.
Print despatch label & paperwork.

Any of the above options can be selected from the menu at the top of the screen. Simple search options allow instruments, or groups to be identified, e.g. list all the instruments of a same type or owner.

Information Stored

Instrument details: Manufacturer, Model, Serial Number, Purchase Date and Price.
Identity or Plant Number.
Calibration details: Calibration Period, Procedure, Calibration Dates and Certificate Number.
Service & repair details: Cost, Parts and Time, Job Number.
Job details: Job Number, Date Despatched, Work Carried Out, Job Comments, Order Number.
User/Customer: Contact Name, Address, Telephone, Mobile, Fax, Account Number, and Comments.
Instrument Status: In use, Calibration Requested, Calibration Overdue, Lost, In Lab, Returned for Repair, Calibration Complete etc.

Installation

The CD provided includes both ProCal and ProCal Track software, support files, uncertainty templates, procedures and reports. An example database is provided to evaluate the software.

Installing the Programs

Put the Transmille Software CD in a drive and allow auto-run to start.

Choose INSTALL under ProCal Track to start the set-up process. If an older version of ProCal-Track exists on the system, choose UPGRADE.

If auto-run is disabled the installer must be started manually. Locate the ProCal-Track directory on the CD in Windows Explorer and run "setup.exe".

Install a new copy of ProCal-Track
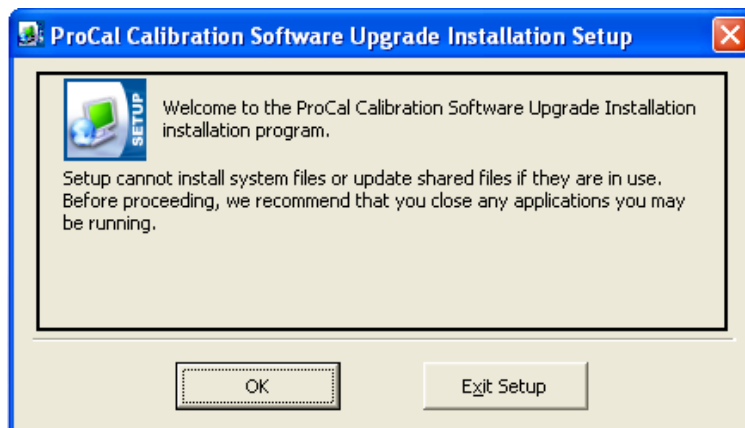
Close down all running applications to ensure the installer can update all the files necessary.
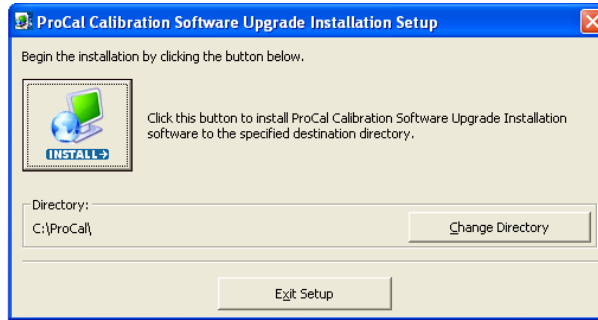
Click the ProCal-Track button to start the installation.
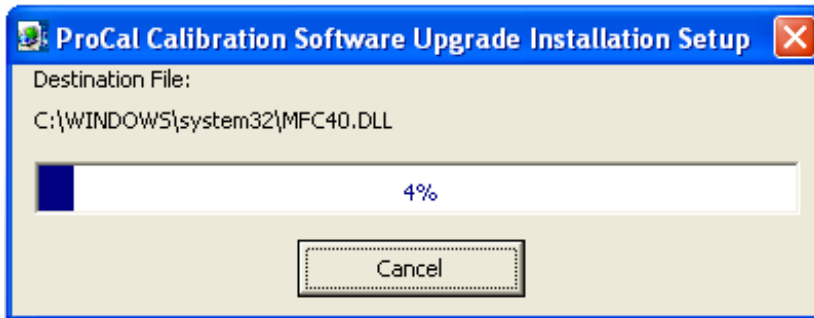
Wait for the installation to complete.
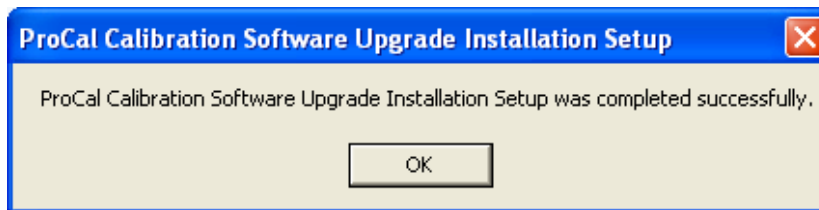
Upgrade an existing copy of ProCal-Track

If a copy of ProCal-Track exists on the system, select Upgrade. The procedure is then the same as for a new installation.
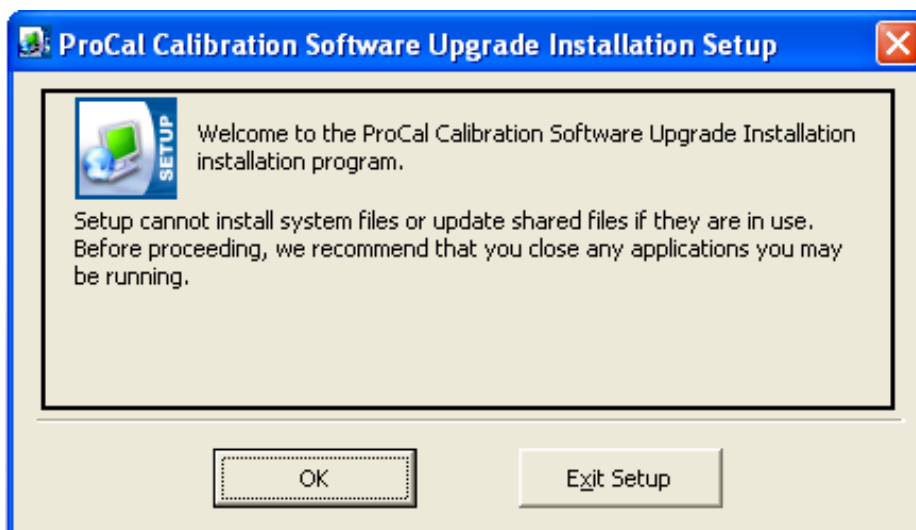
Update Settings and Database Files

If upgrading between major releases of ProCal-Track the settings, databases and the procedures will need to be updated to accommodate the improved features and capabilities of the latest version whilst preserving existing data.

The Database Updater should be loaded by clicking Start->Programmes->Transmille Software->Database Updater. Choose the version number appropriate for your installation (e.g. Version 3 to Version 4).
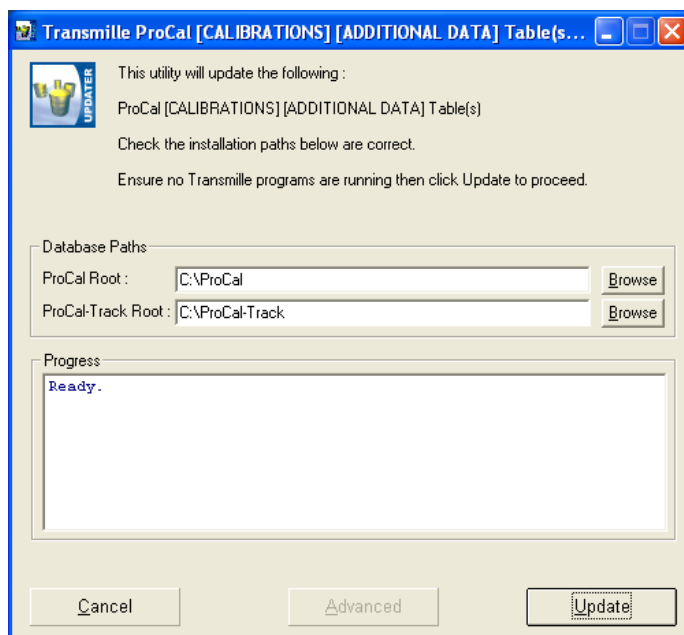
ProCal Root and ProCal-Track Root must be set to the location of ProCal and ProCal Track on the machine. The default value will be correct for most installations.

By default all update operations will be performed. Click on "Advanced" to select which operations are performed during the update. Deselect the checkboxes for steps that do not need to be performed.

If upgrading an installation of several workstations, shared data need only be updated once. On the first workstation perform a complete update process:
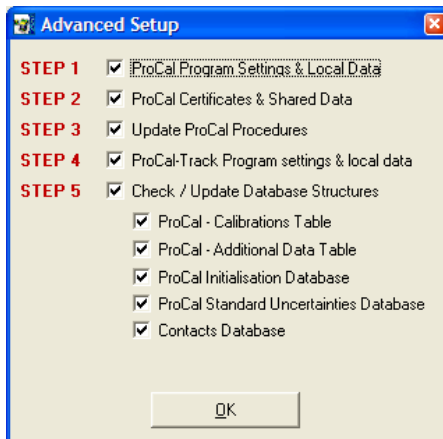
On subsequent workstations only the local data needs to be updated. Select Step 1, Step 4 and Step 5 – ProCal Initialisation Database. This avoids duplicated updates of shared data and saves time:
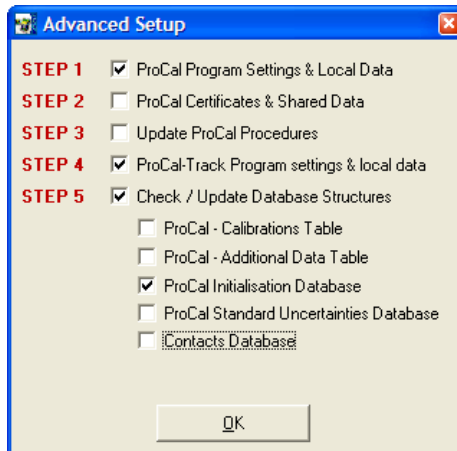
After clicking "Update" the Database Converter will upgrade old databases to use the new format. This may take some time if a large library of procedures is present.

Note: That the updated files may not be compatible with older versions of ProCal or ProCal-Track.
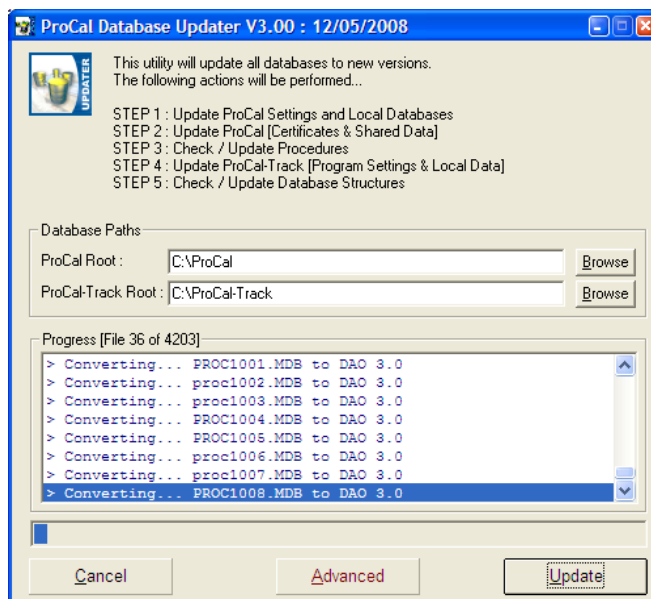
When complete the program will display a summary of the conversion process. A log file will be generated that can be examined if any problems are found after the upgrade.

Run ProCal Track

To start ProCal-Track, click the Windows Start Button, click on "All Programs", then "Transmille Software", and then "ProCal-Track".
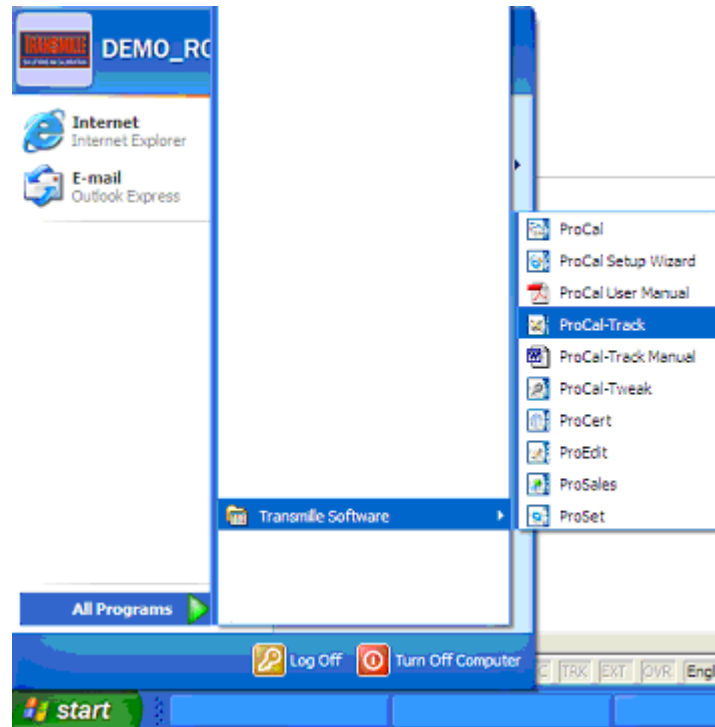
ProCal-Track will be started. A splash screen will show the status of the program.
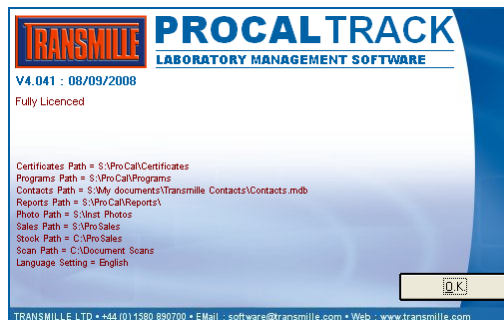
USB Key

ProCal-Track requires a USB key dongle to be attached to the PC in order to run. If a key is present but is not detected try plugging the key into another port. If the key cannot be found, please contact a Transmille representative at sales@transmille.com or on +44 (0) 1580 890700

30 Day Evaluation Period

If ProCal-Track cannot find a USB key it will run in evaluation mode. In this mode the software is fully functional but can only be used for thirty days after being used for the first time. If the software is purchased after the evaluation period has expired the USB key will re-activate the installed software and data.

Upgrade Information For Users of ProCal

ProCal and ProCal-Track share the same results database, allowing ProCal-Track to monitor the progress of instruments as they are calibrated. The results database must be set (in the program options) to the same location that ProCal is using. If the software is used on a single machine

the ProCal-Track installer will automatically use the existing ProCal settings. If ProCal is storing data on a server the location must be set manually.

Database Upgrade

If the version of ProCal and ProCal-Track being installed is newer than the prior version of ProCal the existing database may need to be updated to hold extra information. Follow the instructions in the section Installation - Update Settings and Database Files to complete the upgrade.

Reset Status Codes

If using ProCal-Track with an existing ProCal database, where status codes could be in any condition, it is necessary to reset the status code of all instruments before first use. The menu option Utilities->Advanced->Reset Status Codes is used to set all instruments in the database to the same 'with customer' status.

Note: That for many functions to work the Status codes must be correct.

Step-by-Step Introduction to ProCal Track

This section describes the minimal steps required to run a single example instrument through ProCal-Track.

Create An Instrument

Select the menu item File->Create Instrument
Enter Test Instrument Details (See Create An Instrument Section for more details)
Enter Serial Number "Test001"
Select "Cert Address" tab (to the right of the "Inst Details" tab currently visible)
Enter Test company details
Enter Job Number as "TestJob"
Close the Job screen

Goods Inwards

Select the menu item Utilities -> Goods Inwards
Enter the serial number "Test001" and more input fields will be revealed
Select Service Type
Select Certificate Type
Select Cal Interval
Select Turn around
Click the green "Book In" button

Calibration (bypassing ProCal)

Select the menu item Utilities -> Set Items Calibrated
Enter the serial number "Test001" in the appropriate text box
Click Find Instrument
Select "M: Cal Done, Awaiting Paperwork" from the Status drop-down list

Process Paperwork

Select the menu item Utilities ->Process Paperwork
Locate the Instrument in the list of items with calibration completed
Click "Print Paperwork"

Despatch

Select the menu item Utilities -> Despatch Instruments

Locate the Instrument in the list of items ready for despatch
Click "Despatch Instrument"

Operating Procedure / Overview

This section describes the process of running a single instrument through ProCal-Track, illustrating the states through which a typical instrument will pass and how the system integrates with ProCal.

Receiving an Instrument

If the calibration laboratory has not previously calibrated a particular instrument, then its details will need to be entered manually. Create a new instrument on the system (see Create An Instrument Section). Enter information about the instrument, such as manufacturer and model number and the customer who owns the instrument. If the customer is new, their details must also be added to the system (see Edit Contact Database Section), a photo of the instrument can also be added to aid identification when booking in instruments (see appendix).

Goods Inwards

Once the details of an instrument are present on the system, a job entry may be created. Select an instrument and enter the details of the type of work to be carried out (see Goods Inwards Section) and any extra information such as included accessories. Once booked in the instrument is marked as received and is recorded on the system on the Priority List, which tracks how long each instrument has been in the laboratory and the number of days until the calibration or repairs need to be completed.

Quotations

Customers may require a quotation to be sent before approving work on an instrument (this is specified during goods inwards processing). If an instrument is in the "Awaiting Quote" state no work can be performed until confirmation has been received from the customer.

Calibration

Received instruments will be marked as "Awaiting Calibration" when ready to be worked on. At this point the instrument can be accessed in ProCal and a calibration run started. Depending on the results of the calibration the instrument may follow one of several paths through the system. The most straightforward is a successful calibration, which will result in the instrument marked as "Calibration Done". Further Calibration Outcomes are discussed later in this section.

Paperwork/Process Instruments

Once an instrument has been calibrated a number of documents will need to be printed before the instrument can be returned to the customer. The key official document is the certificate of calibration. A service log, invoice and instrument labels can also be printed automatically. With the paperwork complete the instrument is ready for despatch.

Despatch Instruments

As customers may send in several different instruments for calibration, the ProCal-Track despatch process allows instruments with a common despatch address to be sent out in a single delivery. When a job is selected for despatch, other instruments that can be successfully included in the same delivery are listed.

Return to Customer

Once an instrument has been returned to a customer the instrument status is reset to its original state – "With Customer". This status will not change until the instrument is due for recall.

Calibration Interval and Customer Notification

When a new instrument is entered, a calibration interval is specified (typically 52 weeks). Using this number, and the date when the instrument was last calibrated, ProCal-Track maintains a list of instruments due for calibration (Instruments enter "Requested" state). Customers with instruments that are less than three weeks from their due date are sent reminders (Instruments enter "Requested (Posted)" state). When an instrument passes its due date without calibration (Instruments enter "Overdue" state) an overdue notice is sent to the customer (Instruments enter "Overdue Posted" state). When the customer responds and sends the instrument in for calibration the entire procedure restarts.
Overdue Instruments are visible from the Reports->Overdue Jobs menu.

> **Note: That an instrument will only be removed from the due list if it is returned and booked in, or if the status code and the recall period are manually changed in the View/Edit Instrument menu.**

From time to time it may become necessary to remove instruments that are not returned to keep the list manageable. To change the status code and recall period double click on the instrument and edit the details as required.

Please note that if the recall period is not changed then the instrument will reappear on the list the next time the Due/Overdue function is run, using 999 for the recall period will stop the instrument becoming due for calibration, without deleting it from the system.

Further Calibration Outcomes

There are several reasons why a calibration might not be completed the first time. If an instrument fails one or more tests in a calibration procedure it will need to be adjusted and re-tested. After completing a test procedure that includes a failed test the state of the instrument is set to "Before Calibration – Awaiting Adjustment". The instrument is adjusted to correct the failed readings and the tests re-run in ProCal. The instrument will be marked as "Calibration Done" once all tests are passed.

If an instrument cannot be brought to its specified accuracy, or if damage to the instrument is noticed during the test, the instrument will need to be repaired. Procal-Track can handle both internal and external repair of instruments and allow for recalibration once the instruments have returned from repair. To easily recall an instrument it is wise to note down the certificate number.

Other Delays

An instrument's progress through the system may be held up for a variety of reasons. An instrument could be damaged during transit, or if a job is cancelled, or a repair may be added depending on the customers requirements. A calibration or repair may encounter an unexpected problem causing the instrument to be held awaiting the customer's response.

Status Codes

Every instrument on the system has a status associated with it. ProCal-Track uses these status codes to keep track of an instrument's condition and whereabouts. Status codes change automatically when certain events happen, for example the following process takes place when a known instrument becomes due for calibration, the process begins with the status 'With Customer'.

Instrument recall in 3 weeks
Letter sent to user
(If no reply) Instrument becomes overdue
(If no reply) Overdue letter sent
Instrument received in goods in
Instrument as found calibration done
Instrument sent for repair
Instrument after adjustment calibration completed, job finished
Paperwork for despatch printed
Instrument despatched to customer.

For the majority of system use, knowledge of these codes is not required as all of the above changes are taken care of by the software. For reference these status codes can be found on Page 17 and the Use Codes on Page 26.
These status codes are available and can be manually set in unusual circumstances, such as "instrument lost".
A full list of codes available is given below:

With Customer
Requested for cal
Overdue
Lost
Received awaiting cal
Received waiting quote
Received waiting order
Arrived damaged
As found calibration done
Calibration Incomplete
Sent for cal. / repair (external)
Set for repair (internal)
Cal done - awaiting paperwork
In despatch
Requested (Posted)
Overdue (Posted)
Under Construction
Allocated to Customer
In Stock
Awaiting Parts
Action Required

Status Code Transitions

The following diagram illustrates the principal status codes an instrument can have during its progress through the system. The starting state is "With Customer". The arrows indicate possible transitions between status codes.
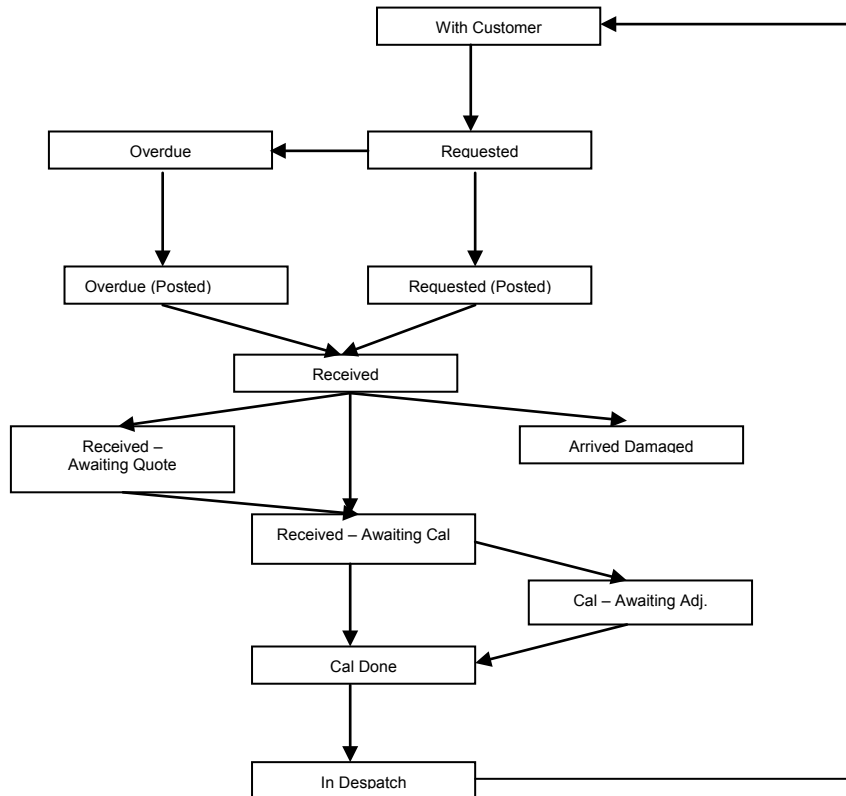
Menu Function Reference

This section describes the operation of each menu function from the below image in ProCal-Track.

From Left to Right:
Create New Instrument
View/Edit an Instrument
View Job Sheet
Search for a Job Sheet
Delete Instrument(s)
Goods Inwards
Despatch
Configure Label Printer
View/Edit Contacts
Edit Custom Lists
Generate Recall Letters
Process Paperwork
Process Non-Invoiced Calibration

Create An Instrument

Select Create Instrument from the File menu (or press Control and N) and confirm that you wish to create a new instrument.
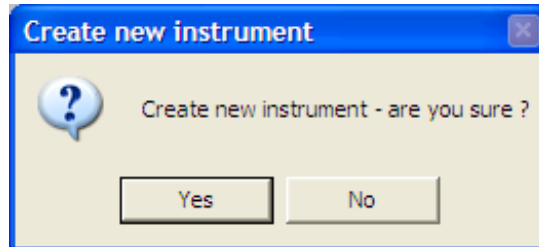
This will bring up the following screen where details about the instrument may be entered:

INSTRUMENT DETAILS

Description

Enter a description of the instrument. The description may be entered manually or chosen from the drop-down menu. Clicking the "…" button to the right will bring up the file containing the pre-defined choices. Make changes in this file and save; updated values will be available when new instruments are created. This function is also available through [Utilities->Edit Custom Lists] from the main menu.
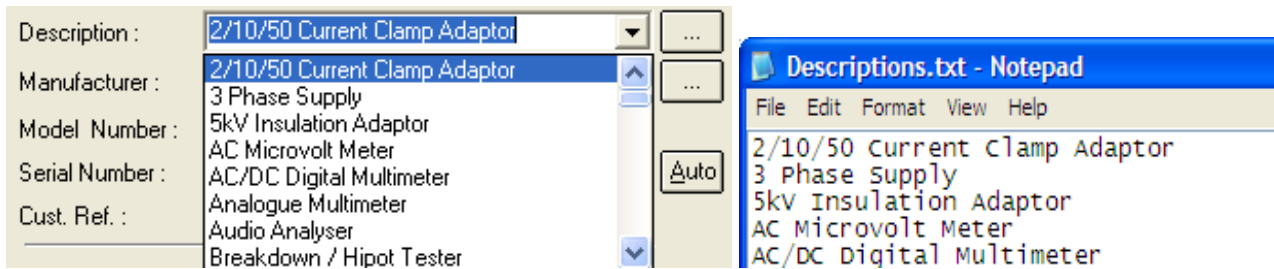
Manufacturer

Here you can enter the manufacturer of the instrument. The description can be typed in or chosen from the drop-down menu, clicking the "…" button to the right will open the file containing the pre-defined choices, here you can make changes and add/edit/delete manufacturers and then save the file; updated values will be available when new instruments are created. This function is also available through [Utilities->Edit Custom List->Manufacturers] from the main menu.

Model Number

Enter the model number of the device.

Serial Number

Enter a serial number for the instrument. Click the Auto button to let the system automatically choose the next available serial number, only use this option if the instrument has no serial number.

Cust Ref

Enter a customer reference for this job. This can be a word or number, some companies will assign their instruments asset numbers, and these can be used for the customer reference. It is another form of identification for the instruments.

Procedure No.

Enter the number of the procedure that will be used to calibrate this instrument. This will be used by ProCal to select which procedure to use for a calibration run.

PAT Test code

Enter the PAT Test code for the instrument if required.
Certain PAT's can have procedures that are set to codes or ID numbers, which means that a procedure doesn't need to be entered manually but will automatically search for the correct procedure using the PAT Test Code.

Site

Enter the site where the instrument is located, or choose from the drop-down menu.

Department

Enter the department where the instrument is located, or choose from the drop-down menu.

Location

Enter the location of the instrument, or choose from the drop-down menu.

Cal Source [Calibration Source]

Choose the calibration reference source of the instrument.
The Calibration Source specifies where an instrument will be calibrated, for instance if an instrument arrives that has to be subcontracted to an external laboratory then this box can be set to that laboratory. Therefore for future calibrations this instrument will have the sub-contract details attached to it, instead of having to find them manually.

Date Acquired

Enter the date this instrument was acquired. Dates should be entered in DD/MM/YYYY format.
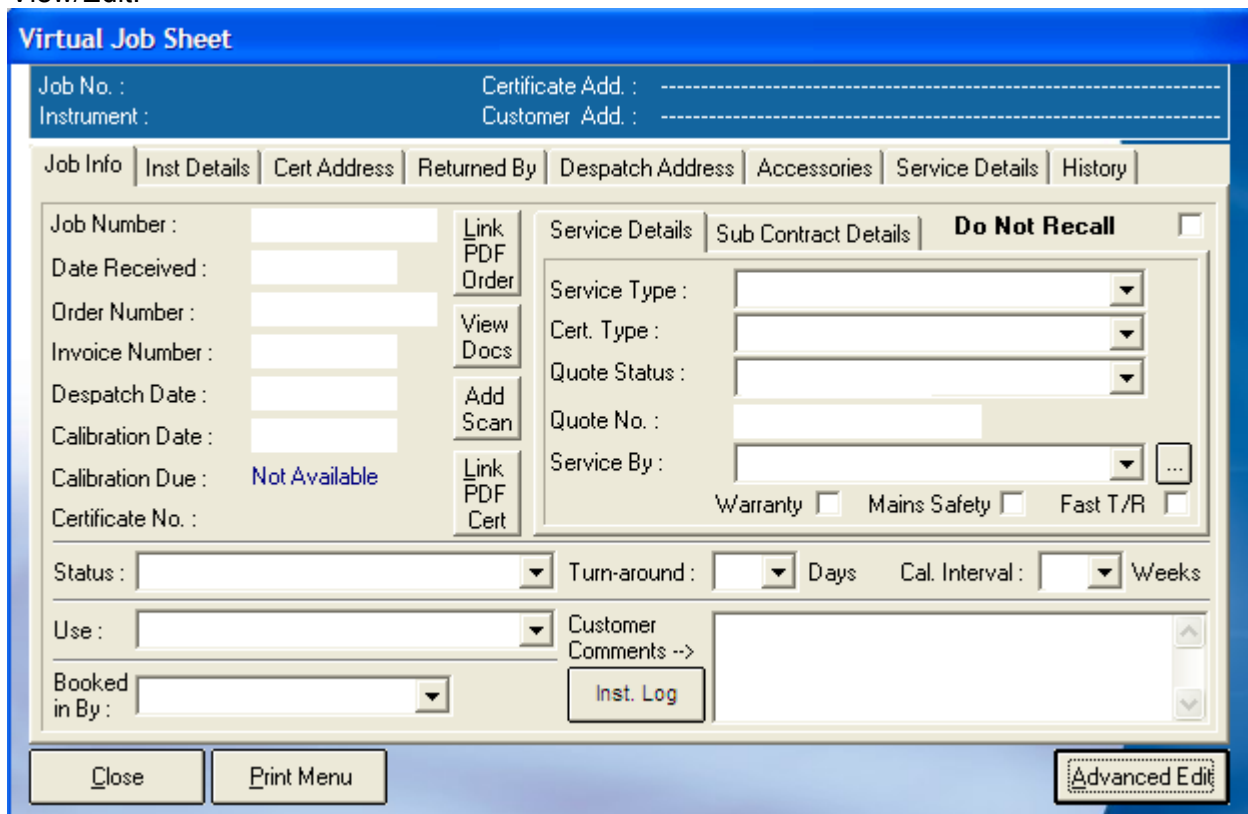
Date Scrapped

Enter the date this instrument was scrapped, if required. Dates should be entered in DD/MM/YYYY format.

Instrument Cost
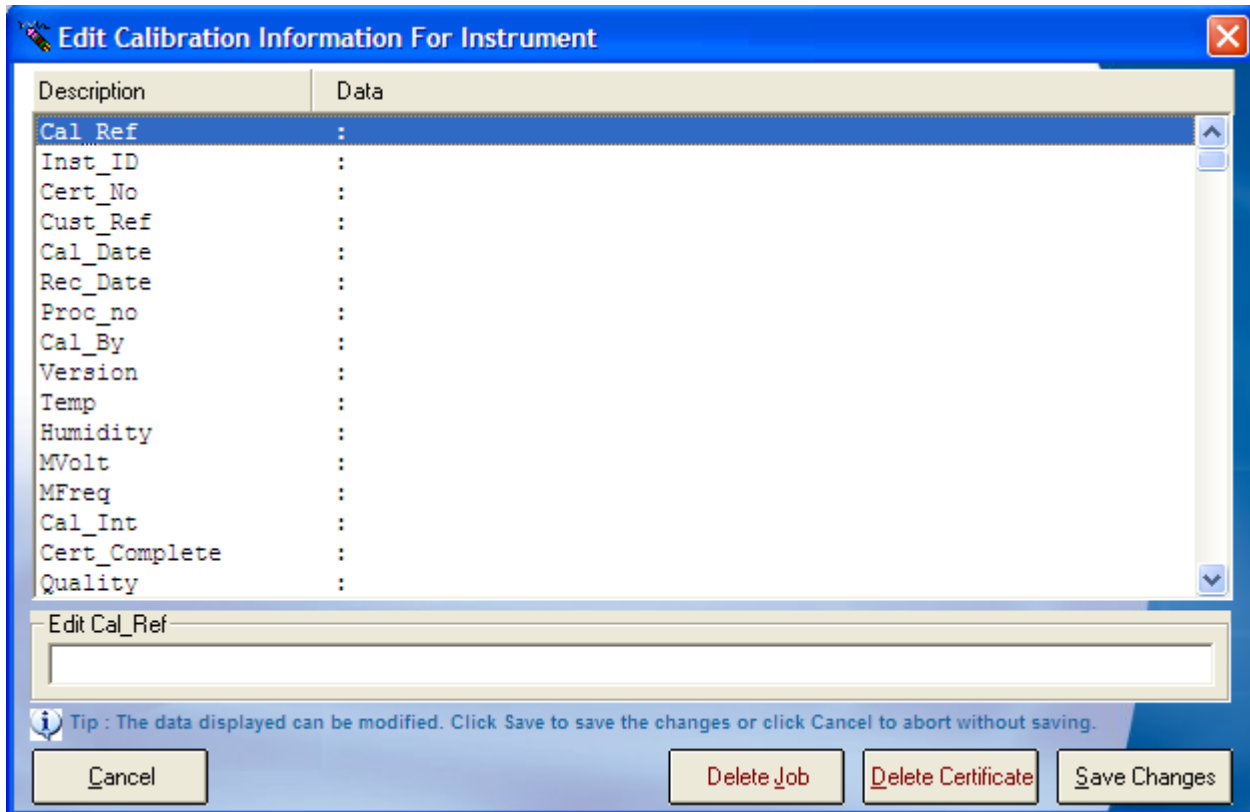
Enter the cost of the instrument
Click Close when all required information has been added.

Advanced Edit

Advanced Edit can be found on all virtual job sheets, to manoeuvre to this menu, click File->View/Edit an Instrument, enter the identifying number such as an instruments serial or job number, when the instrument details appear, double click them, or highlight them and click View/Edit.

Once this menu appears, click on Advanced Edit to change more intricate details about the instrument, such as the signatory for the certificate, or the traceable instruments used during its calibration.

All the details of an instrument can be changed in this menu, so care should be taken that important data is not lost, this function can be set to Administrator Access only. The list of enterable data is long; this list contains the information for every part of the instruments procession through Booking In, Calibration and its Despatch details.

Certificate Number

If an instrument has been subcontracted out to an external company, then upon its return, the certificate will need to be linked to the instruments details, go into the Advanced Edit of that instrument, highlight 'Cert_No' by clicking it, and then type the certificate number into the text box below, once the information has been entered click "Save Changes" and then "Yes". For a sub-contracted instrument it is advisable to also scan and link the certificate to the instrument.

Editing Signatories

To edit the signatory of a certificate, the same method is followed as for entering a Certificate Number, search and open the Job Sheet of the required instrument, open The Advanced Edit menu, and scroll down, highlight the line data that needs to be entered, and type the information into the text box.

Editing Traceable Instruments

The same process can also be applied for editing the traceable instruments that were used during the calibration process. As the image below shows, each traceable instrument has its name, serial number, certificate number, the date that instrument was calibrated, and the calibration period.

Note: Once Save is clicked, any changed data will be saved and could affect certificates, reports, and can change information such as despatch addresses, therefore it is wise to operate within Advanced Edit with care.

Note: Only a user with administrator access will have the Advanced Edit function available to them on a Virtual Job Sheet, both the engineer and the operator are unable to access this menu.

Batch Create Instruments

The batch create instruments screen allows the rapid creation of a number of identical instruments and can be accessed by clicking File->Batch Create Instruments.

Click on Batch Create Instruments, if manual serial numbers is selected, a prompt to enter each number will appear, if print labels is selected a label will be printed for each new item.

Model Number / Manufacturer / Description

Enter the instrument details manually or choose from the drop-down list.

Edit

It is possible to create a series of serial numbers for certain instrument types. Files stored in the ProSales\Serial Numbers directory maintain the next available serial number for specific instruments. Click edit to access this file for the instrument currently described by the manufacturer / model number / description fields.

Serial Number(s)

Select Manual to be asked for each individual serial number as the instruments are created. Select Automatic to let the system determine serial numbers.

Batch Number

If entered, the batch number will be appended to each serial number.

Print label(s)

Select the check box to print a label for each new instrument.

Company Name / Address / Order Number

Enter the details of the company, their address, and the order number for the instruments.

No. (Number of Instruments)

Enter the number of instruments to create in this batch.

Turn-Around

Enter the turn-around time for the calibration.

Cal. Int. (Calibration Interval)

Enter the interval between calibrations for the instruments.

Status / State

Enter the initial status of the instruments. A list of these statuses can be found in the appendix.

Service Type / Certificate Type

Select the work to be done on the instruments.
The certificate and service type codes can be found in the appendix.

Job Sheet(s)/Label
Choose whether a Job label or Job Sheet should be printed, there is also the option to print both, from here the number of items to print can be chosen, (0 –3).

Searching for Instruments

The same search interface is used to search for both instruments and job sheets.

View / Edit Instruments

Selecting View/Edit Instruments from the main menu will bring up the instrument search screen:

To specify the search criteria, click a button in the left column to select the field to search for. This will reveal an entry box where the search details may be entered or selected from a drop-down list. Click on a search category button a second time to remove that criterion from the search.


Click Start Search. If matching instruments were found the following screen will appear:
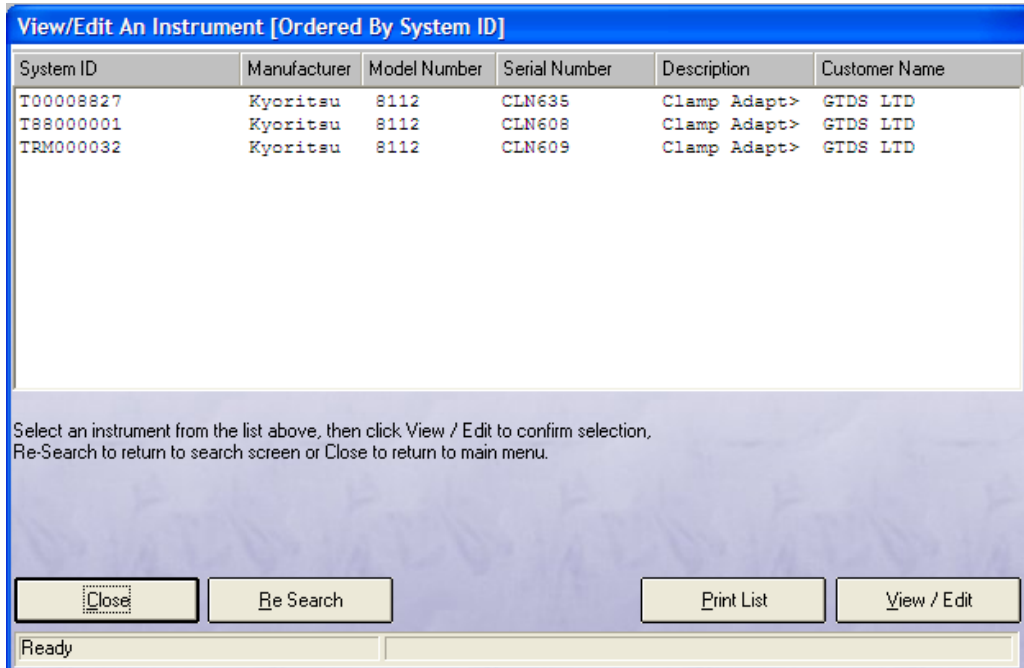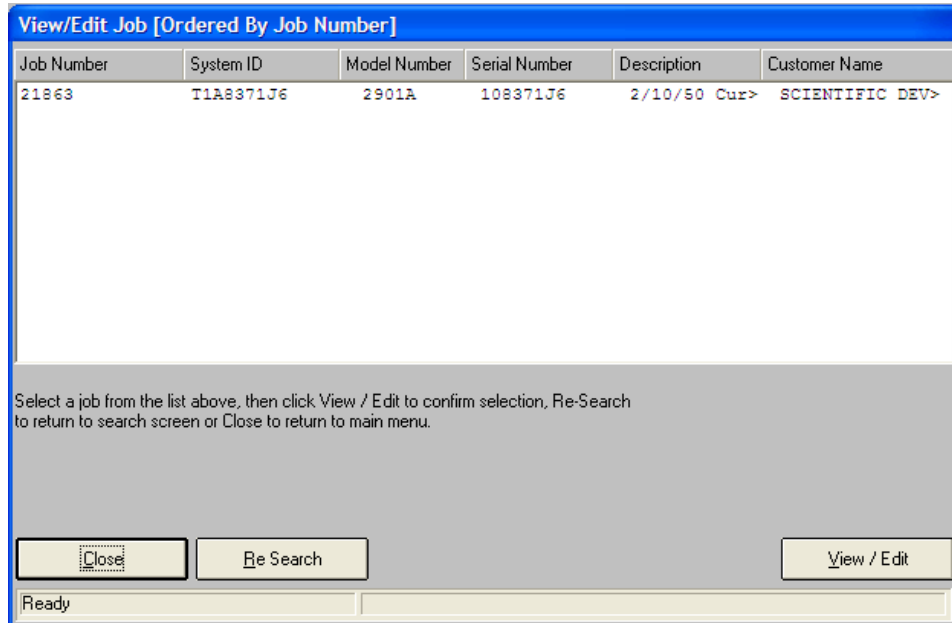
Select an instrument, then click View / Edit (or double-click the entry in the list) to go to the virtual job sheet for that instrument. Click Re-Search to go back to the search screen.

Search for Job Sheet

Selecting File-> Search for Job Sheet from the main menu will bring up an interface similar to searching for instruments to select which job sheet is to be viewed.
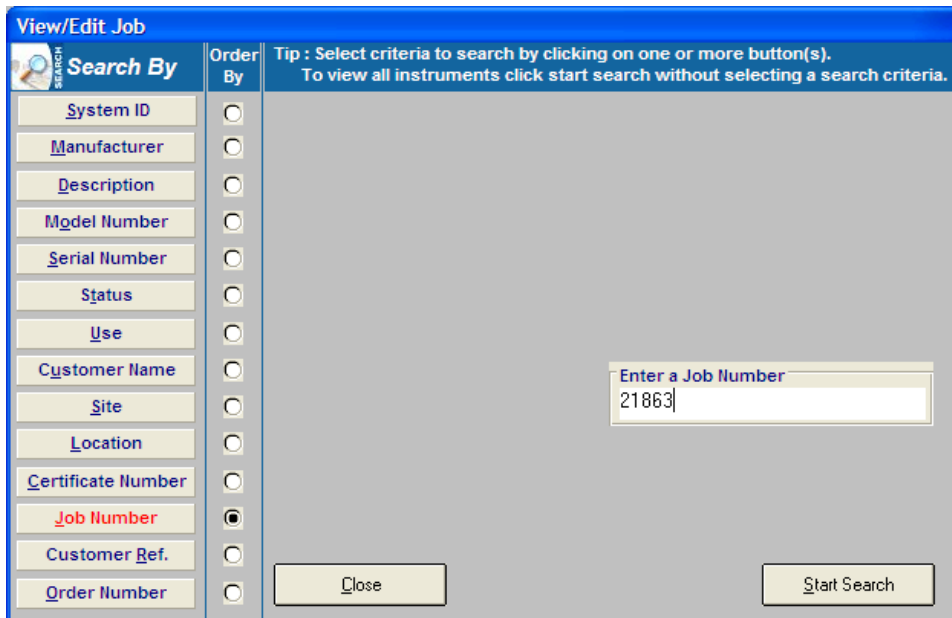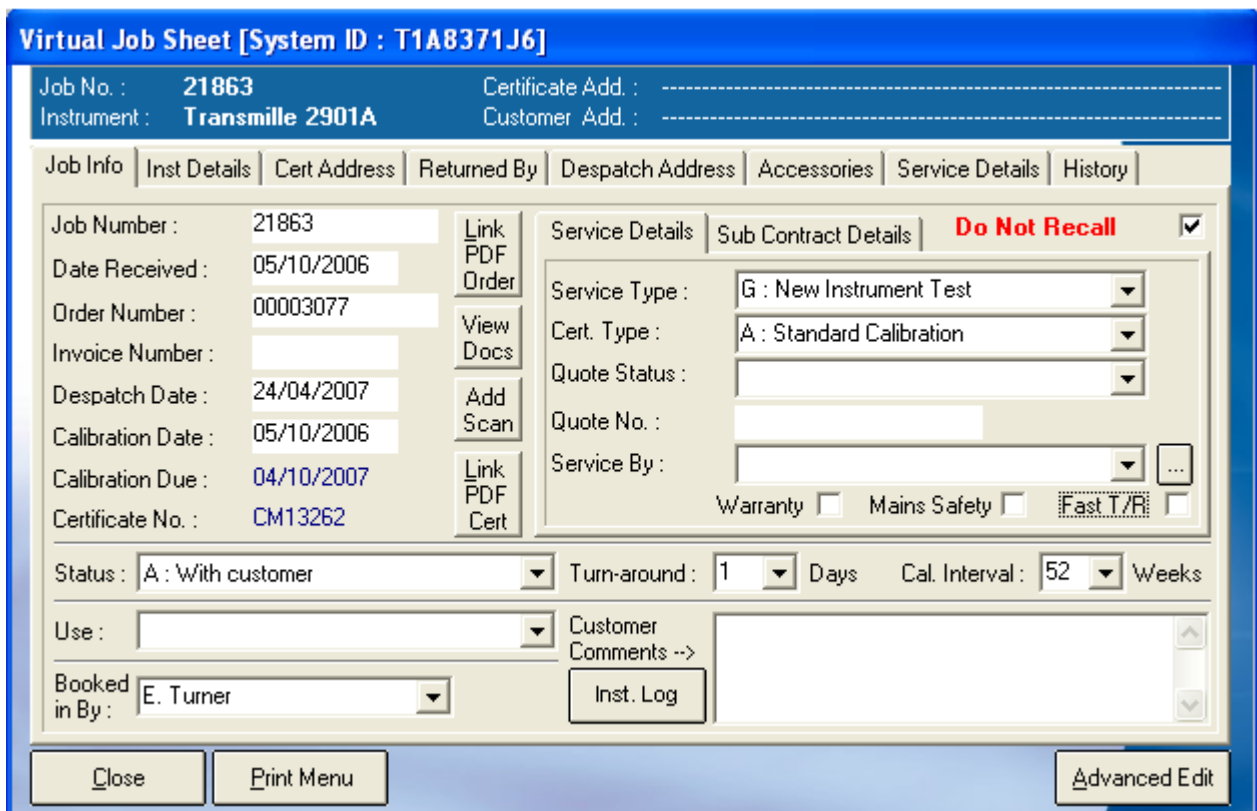
Click "View/Edit" to bring up the Job Sheet.

Job Sheet – Job Info

This tab contains details of the selected job.

Job Order Details

Most details about the job will have been completed during the book-in process and may be edited here.

The Calibration Date will be filled in when the instrument is calibrated. The Despatch Date will be filled when the instrument has been despatched.

Link PDF Order

If the job has a scanned customer order linked, clicking the Adobe Acrobat logo will show the PDF file of the customer order. If the job has no linked scan there will be a button in this location. First scan the customer order then click the "Link PDF Order" button to link the new scan to this order. It is advisable to scan and save customers orders during the booking in process, to allow for efficient tracking if an issue arises.

View Docs

Each instrument has a directory containing documents relating to that instrument. Click "View Docs" to open this location in Windows Explorer.

Status

Instruments have their status automatically updated as they progress through ProCal-Track. If the status of an instrument needs to be changed, select the new status from the drop-down list. The list of different statuses and their definitions can be found on page 17.

Use

If the instrument has a special use, one of six can be selected from the drop-down list. A full list is given below:

A: Demo/Loan
B: Hire
C: Sale or Return
D: Laboratory Standard
E: Beyond Economical Repair
F: Quarantined

Booked in By

This is set to the user who performed the original goods-in book in. It may be set to another name if required.

Service Details

This tab contains details of the service to be performed on the instrument.

SERVICE TYPE

This specifies the type of work to be performed on the instrument

CERT TYPE [Certificate Type]

This specifies the type of certification the job requires. Selecting an accredited certificate for the instrument, then ProCal will only select an accredited

QUOTE STATUS

If a customer requires a quote before calibration or repairs can commence, the quote status will be "A – Quote Required". This changes to "B - Quote Sent – Awaiting Reply" when the customer is notified and "C - Go-Ahead Given" when the customer has approved the work to be done.

SERVICE BY

Select the company that will perform the calibration. If this is not the principal company the sub-contract details must be filled in (see below).

WARRANTY

Select this checkbox if the job is warranty work.

MAINS SAFETY

Select this checkbox if the job requires mains safety testing. If selected the instrument will be tested with a Portable Appliance Tester and an electrical safety label printed.

FAST T/R [Fast turnaround]

Select this checkbox if the job requires fast turnaround.

Sub Contract Details

When a calibration job is to be performed by another company, details about the sub-contract must be entered.

Select the sub-contractor from the "Sent To" list. Enter an order number and the expected return date, and then click "Despatch to sub contractor". The instrument status will be set to K – Sent for cal (External).

Run Report

The run report option will not work unless Crystal Reports is installed.

Demo / Loan Details

If an instrument has been sent out as a demonstration unit or is on loan the subcontract tab will be replaced with the demo/loan tab. The despatch date and expected return date are filled when the instrument is shipped. The date received is filled when the unit has been returned.

Job Sheet – Cert Address

This tab contains the address to be printed on the certificate. Select an entry from the "Account Number" or "Company Name" drop-down boxes to fill with the details of an existing company. To create a new company, fill in all the details and click "Add Company".

Job Sheet – Returned By

This tab contains the address from which the instrument was returned. This address is only needed if the instrument has been returned from an address different to the one on the Certificate Address.
Select an entry from the "Account Number" or "Company Name" drop-down boxes to fill with the details of an existing company. To create a new company, fill in all the details and click "Add Company".

Job Sheet – Despatch Address

This tab contains the address from which the instrument was returned. This address is only needed if the instrument is to be despatched to an address different from the one on the certificate.

Select an entry from the "Account Number" or "Company Name" drop-down boxes to fill with the details of an existing company. To create a new company, fill in all the details and click "Add Company".

Job Sheet – Accessories

If an instrument is delivered with a number of accessories ProCal-Track will track these to make sure they are returned to the customer. Several accessories are defined in an accessories list. Click "Edit Accessories List" to change or create new accessories, then save the file. When done click "Update Screen" and the accessories screen will show a checkbox for each accessory defined in the list. Select each accessory that was delivered with the instrument.
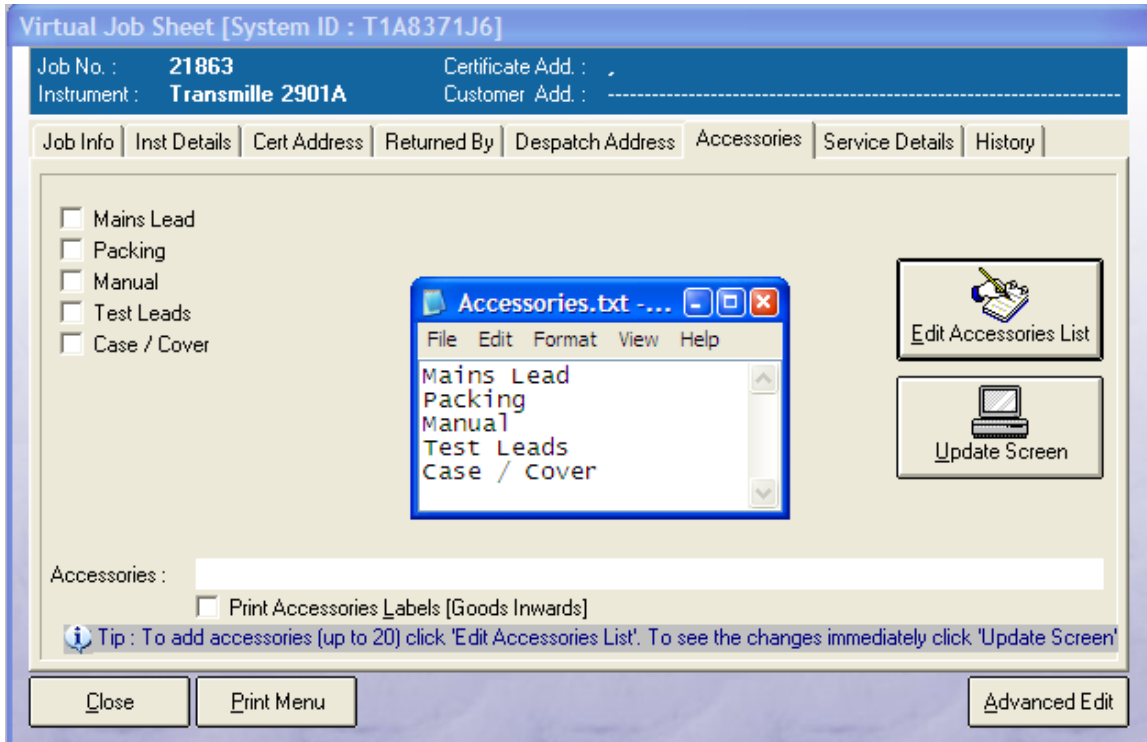

Selecting "Print Accessories Labels" will print labels for the accessories when the instrument is being booked in.
If the accessory labels are not printed then, they can be accessed through the Job Sheet, by clicking Print Menu, and then Print Accessories Labels.

Job Sheet – Print Menu

If the job label is lost from an instrument, then it can be reprinted by finding the instrument using the "View/Edit Instrument" function, the job label can then be printed by selecting print Menu and clicking Job Label, this same method can also be used when printing an ID Label, click Print ID Label instead of Job Label.
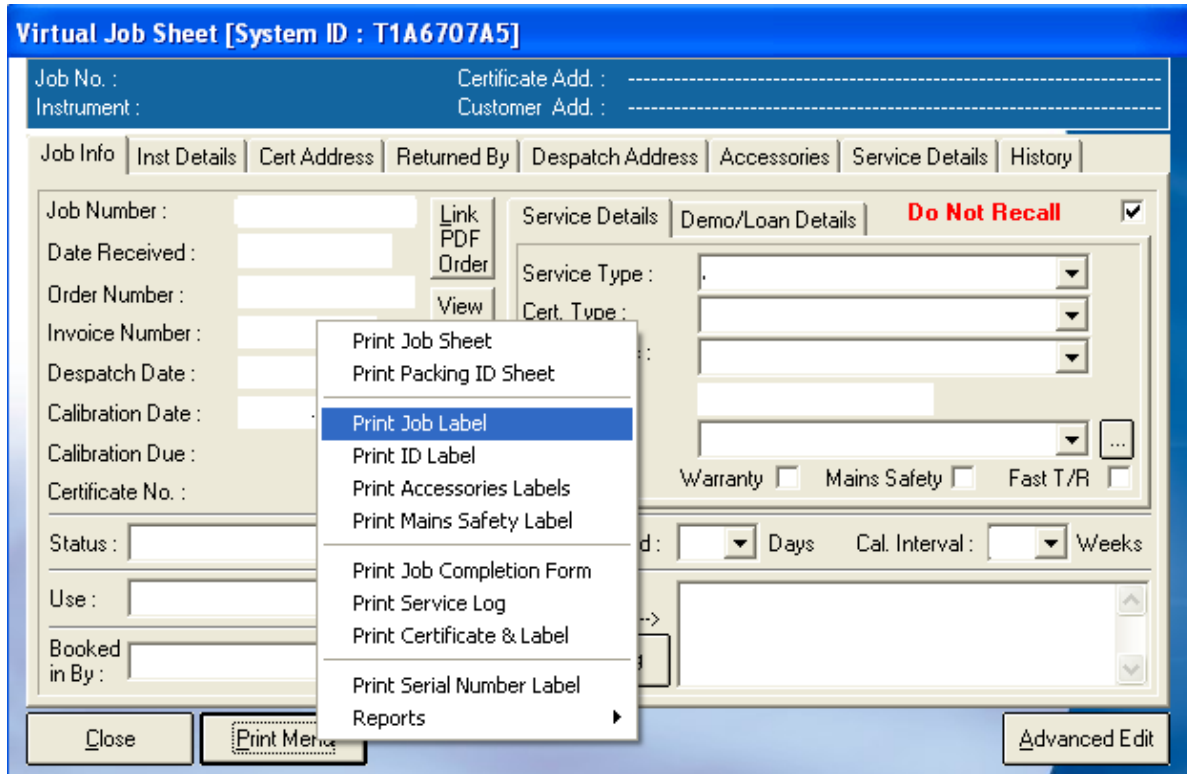
Job Sheet - Service Details

The Service Details tab contains a number of sub-tabs with details of the services performed on the instrument during the job.

Job Sheet - Service Details – Services

This tab allows the services performed on the instrument to be entered. One calibration, one repair and up to three other services may be entered. Enter the quantity and cost of each service to calculate the total cost.

If the stock system is active, click on the green "+" to choose a service or part from stock and enter the description and the price automatically. (See the description of the stock selection in the next section.) If the stock system is not active a list of pre-defined items may be chosen from the drop-down list. Click "Edit Parts List" to change the list of items.

Job Sheet - Service Details – Parts Used

This tab allows the parts used during servicing of the instrument to be edited. Enter a description, quantity and cost for each part to calculate the total cost.

Stock Selection

If the stock system is active, the Service Description and Parts Used tabs will have a green "+" to add a service or part from the stock database and a red "-" to remove the currently entered item. Clicking "+" will display the stock database product selection screen as below.

Stock Selection – By Type

First select the type of stock item needed (e.g. spare part or repair service). Then select the category of item within that type (e.g. type: spare part – category: batteries, or type: calibration – category: high voltage). The table will now be filtered to contain only items of interest. Click on a row in the table to select that item, and then click "Select Item" to copy the details into the job sheet. If more that one item is needed, select the required quantity in the "Qty" column.

Stock Selection - Search

Stock Code	Description	Category	Cost (Accred)	Cost (Std)
A156	Nut - 4BA	Hardware	£0.19	£0.00
A174	Nut - M4 PK100	Hardware	£0.01	£0.00
A175	Nut - M5x6 PH	Hardware	£0.08	£0.00
A182	Nut - M5 stiff	Hardware	£0.00	£0.00
A201	Stiff nut - M4	Hardware	£0.00	£0.00
A283	Nut - Brass M6	Hardware	£0.12	£0.00
V043	Loctite- Nut Lock	Tools	£15.72	£0.00
V060	NUT SPIINER 4BA	Tools	£12.12	£0.00
V061	NUT SPINNER 6BA	Tools	£12.12	£0.00
V062	NUT SPINNER 8BA	Tools	£12.21	£0.00
V063	NUT SPINNER 4mm (M2)	Tools	£12.21	£0.00
V064	NUT SPINNER 5mm (M2.5)	Tools	£12.00	£0.00
V081	NUT SPINNER 5.5mm (M3)	Tools	£12.45	£0.00
V083	NUT SPINNER 6mm (M3.5)	Tools	£12.45	£0.00
V084	NUT SPINNER 7mm (M4)	Tools	£12.66	£0.00
V085	NUT SPINNER 8mm (M5)	Tools	£12.66	£0.00

TYPE : SPARE / REPLACEMENT PART

CATEGORY : Batteries

To select a stock item by a keyword, click the "Search" button. Enter a search term when prompted in the message box. For example, entering "nut" finds every product with "nut" somewhere in the description producing the results shown above. Wildcards may be entered, with "?" matching any one character and "*" matching any series of characters. Click on a row in the table to select that item, and then click "Select Item" to copy the details into the job sheet. If more that one item is needed, select the required quantity in the "Qty" column.

Engineer's Report

The engineer may enter comments about the instrument and the work performed when the job has been performed. These comments may be edited in this text box. The engineer responsible for this instrument may be entered into the "Engineer" text box or selected from a drop-down list. The list of engineers may be edited using the Utilities->Edit Custom Lists->Edit Engineer List item on the main menu.

Job Comments

When a job is completed, the operator can enter two comments on the state of the instrument. These may be typed into the text box or selected from the drop-down list of standard comments. Clicking the "…" button opens the file containing the list of comments for editing. Changes made here will be reflected in the options available upon completion of a calibration in ProCal.
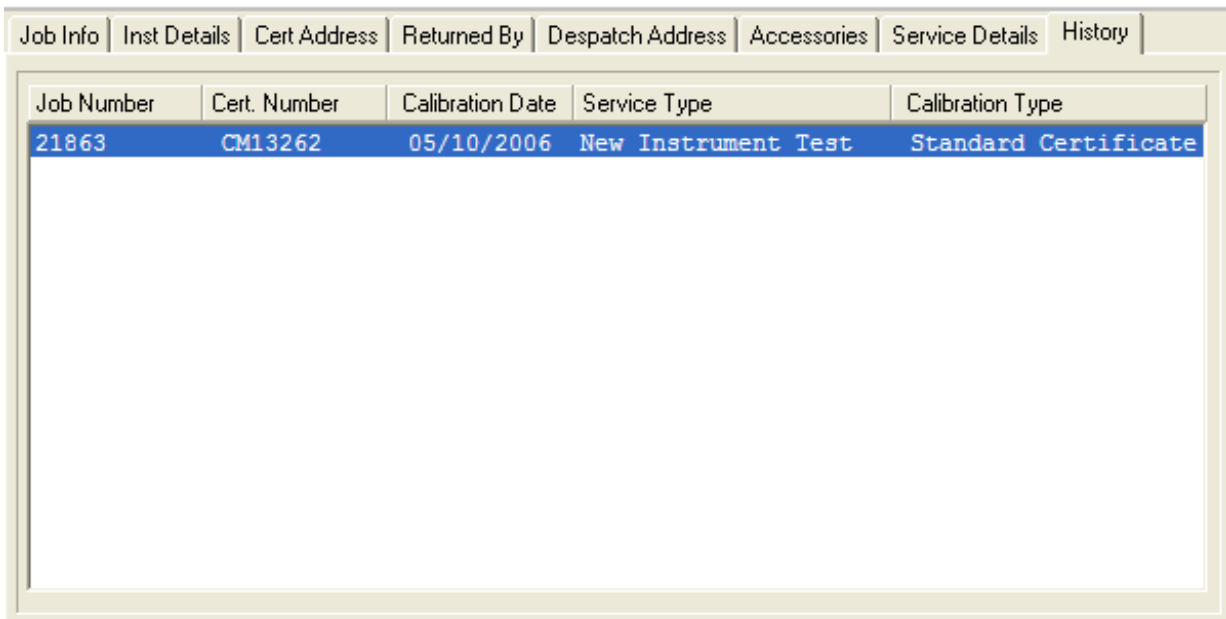
History

ProCal-Track keeps a history of all calibration jobs performed on an instrument. Double-click on an entry in this list to see the details of a previous job.

Delete Instruments

Selecting File->Delete Instrument from the main menu will bring up a similar interface to select which instruments are to be deleted.

Goods Inwards

Selecting Utilities->Goods Inwards - Book In Instruments will bring up the Book In screen:

Type the serial number of the instrument to be booked in into the flashing box and press enter. (Alternatively use the barcode scanner.) This will display the details of the chosen instrument.

Certificate Address

The address details on this tab will be printed on the certificate. Select a company from the drop-down menu to fill in the complete details. Click Add/Edit Address to bring up the contacts database and change customer details.

Customer Address

This tab contains the address details of the customer who has sent the instrument for calibration. These details should always be cross-referenced with the customer order to ensure instruments are despatched to the correct address.

Despatch Address

The address details on this tab will be used if the instrument is to be despatched to an address other than the customer's. These details should always be cross-referenced with the customer order to ensure instruments are despatched to the correct address.

Instrument Details

Complete the required instrument details. If the instrument has not been calibrated previously then these details will need to be entered manually.

Service Type

Select the type of work to be performed on the instrument. Choose from the list below:
A: Calibration Only
B: Repair Only
C: Repair & Calibration
D: Modification
E: Investigation
F: Calibration (No Adj)
G: New Instrument Test
H: Inspection Test

Cert Type [Certificate Type]

Select the type of certificate to be issued. There are five types of certificates available:

Standard certificate: Categorises a Traceable or Commercial certificate.

Accredited Certificate: For accredited laboratories.

C of C Certificate: A Certificate of Conformance, or CertCon.

Electrical Safety Test: For procedures which are concerned only with testing electrical safety (e.g. Portable Appliance Test results).

Test Report Certificate: A test report, typically for new instrument testing on product lines or in ATE (automatic test equipment) systems where sub assembly testing is performed.

Job No. / Order No.

The Job number will be chosen automatically by the system.
The Order Number can either be entered manually if the customer provides one, or an auto-number can be chosen by the system.

Cal Interval [Calibration Interval]

Input the length of time there should be, between calibrations. This number is used to determine when instruments become due for calibration.

Turn-Around

Input the expected duration of the calibration process.

Fast Turn Around

Select fast turn-around if an instrument needs to be processed more rapidly than normal.

Mains Safety

Select this checkbox if the job requires mains safety testing. If selected the instrument will be tested with a PAT and an electrical safety label printed.

Under Warranty

Select if the instrument is under warranty.

Damaged

Select if the instrument has been damaged before being checked in for calibration.

Quote Req'd [Quote Required]

Select if the customer requires a quote before work commences.

Link to Scanned Customer Order

If a document scanner is available a scan of the customer's order as a PDF file may be linked to the customer order entry in the database. First the customer order must be scanned into the temporary scanner files directory (default: c:\ScanTemp). Clicking "Link to Scanned Customer Order" will take the most recent PDF file in the scanner directory; rename it to the order number and copy to the storage directory for scanned orders. The customer order can now be viewed from the job sheet. If this process is not carried out during the Booking In process then an alternative method is explained in the Appendix.

Book In

When the information is complete, click the green Book In button. This will mark the instrument as booked in and add the job to the *Instruments Booked In This Session* list. A new instrument may now be booked in. Selecting the Recall Last Customer checkbox will use the same customer details for the next instrument to be booked in. Similarly Recall Last Inst Details repeats the same instrument details and Recall Last Job Info uses the same Job Information.
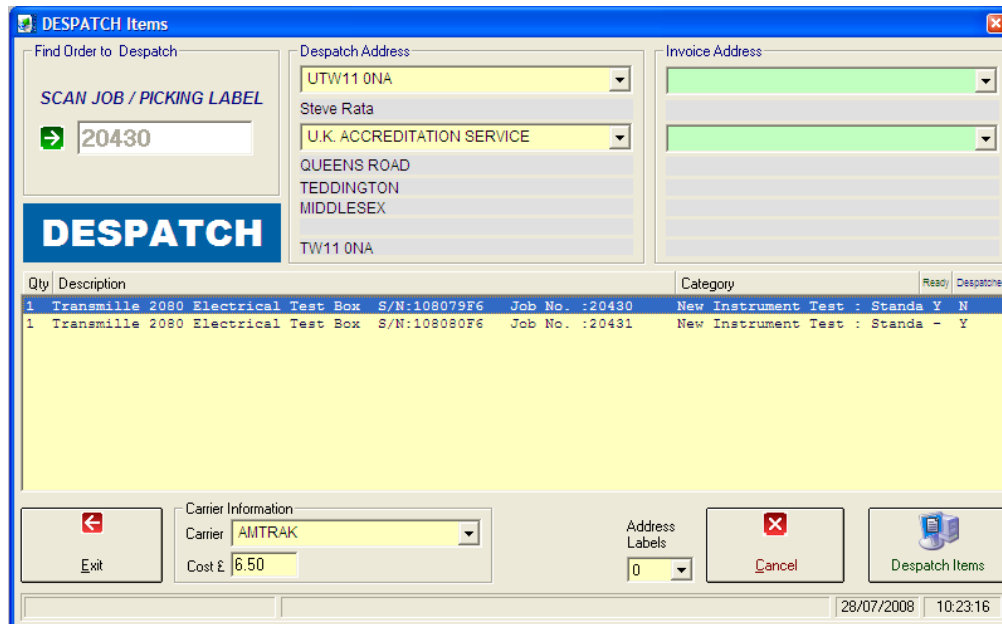
Instrument Despatch

This section describes the procedure for despatching completed instruments and orders.

Selecting Utilities->Despatch will display the Instrument Despatch Confirmation screen.
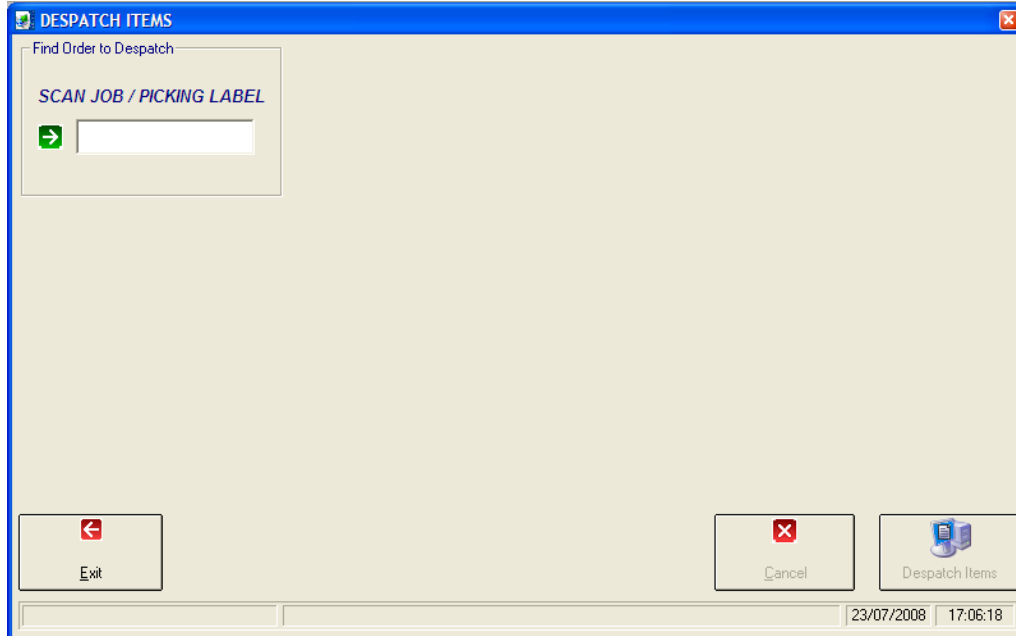
Enter or Scan Job Number

Enter the job number of the item to be despatched into the text box, or scan the item's barcode. The full despatch screen will then be shown.

Despatch and Invoice Addresses

Ensure the despatch address is correct; select a new contact ID or address if required. If the invoice and despatch addresses do not match, select a contact ID or address to which the invoice will be sent.

Despatch Item List

A list of items that may be despatched is shown. Click on each item in the list that is to be despatched in this delivery. Multiple orders may be despatched in the same delivery as long as they are ready for despatch and have the same despatch and invoice addresses.

Carrier Information

Select the carrier to be used from the drop-down list, and enter the cost of carriage into the Cost box.

Address Labels

Select the number of address labels to print when completing the despatch.
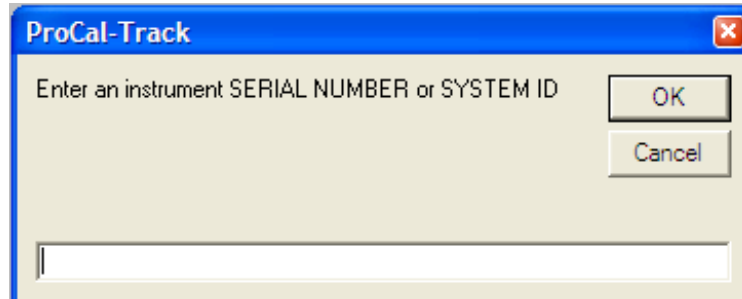
Despatch Items

Click "Despatch Items" to mark the selected items as despatched and print out a picking list detailing which instruments are to be sent to the customer. If the instrument has accessories associated with it, the Accessories Despatch Screen will appear to confirm that they are included in the delivery:
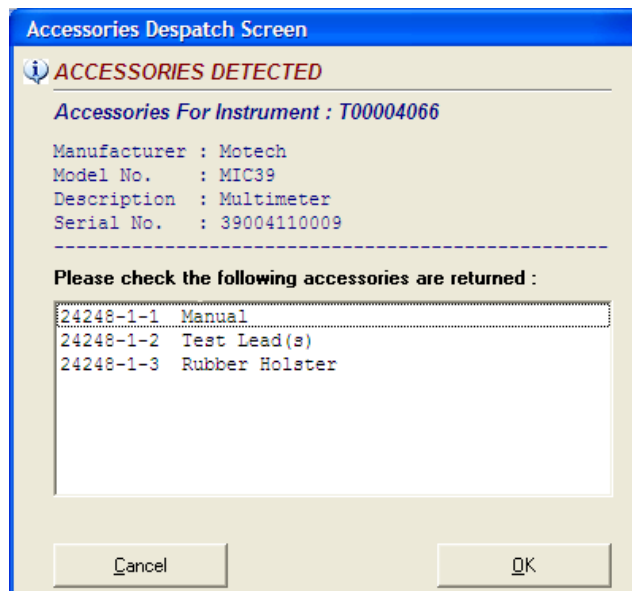

When finished, ProCal-Track will return to the "Scan Job Label" screen awaiting further despatch jobs.

Demo or Loan Despatch

Sending out an instrument for a demonstration or as a loan takes it directly from stock and marks it as being with the customer. Selecting "Demo / Loan Despatch" brings up a message box requesting an instrument serial number or a system ID:

If multiple instruments are found with a matching serial number, select the desired one from the list:
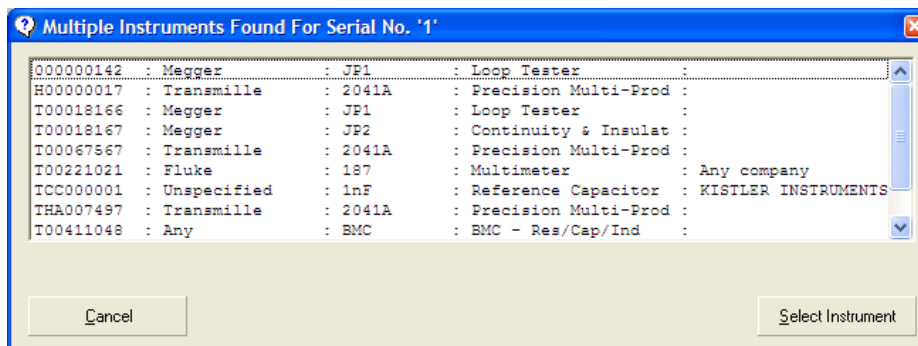
The demonstration / loan despatch screen will be shown for the chosen instrument:
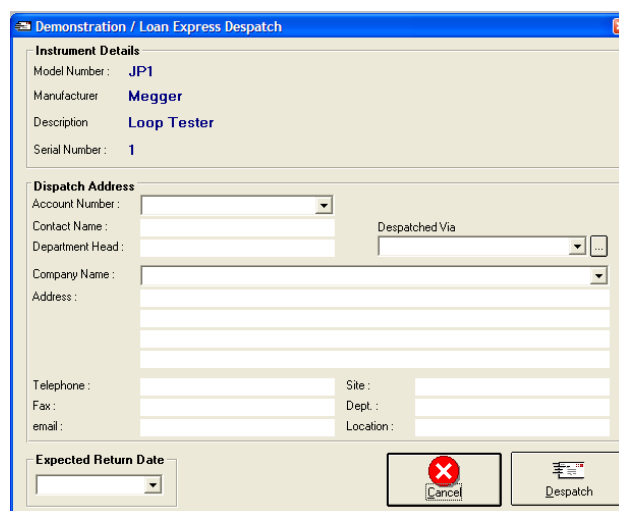
Despatch Address

Selecting an entry from the Account Number drop-down list can fill in the despatch address of an existing customer.

The Site, Department and Location will depend on the instrument.

Despatched Via

Select the delivery method that will be used for this instrument. Click the "…" button to edit the file containing the list of standard delivery methods.

Expected Return Date

Select the duration of the loan. The instrument's due date will then be calculated from today's date.

Configure Label Printer

Click Utilities->Configure Label Printer, to set up the label printer. The options available will depend on the type of printer selected. Click "Print Test Label" to confirm the printer is configured correctly.
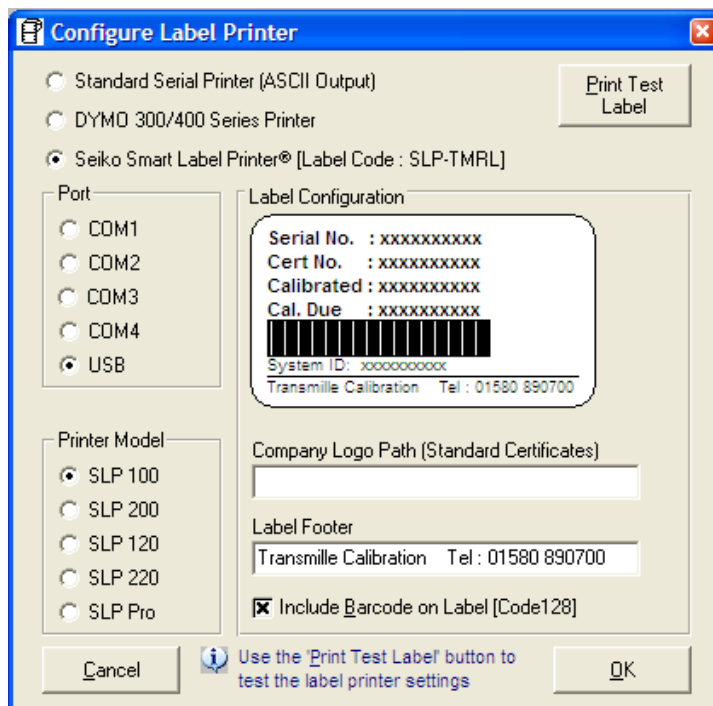
Standard Serial Printer

Select the serial port to which the printer is attached (COM1-COM4 for serial connections).

DYMO 300/400

This printer is configured using the Dymo software.

Seiko Smart Label Printer

PORT

Select the port to which the printer is attached.

PRINTER MODEL

Select the specific model of the Seiko Smart Label Printer.

COMPANY LOGO PATH

If the company logo is to be printed on the label, enter the name of the graphic file in the "Company Logo Path" box, or click on the "…" button and navigate to the correct file.

LABEL FOOTER

Enter text to be printed at the bottom of each label, if required.

INCLUDE BARCODE ON LABEL

Select this checkbox to print a barcode on each label for later use by barcode scanners.

Set Logo Positions

The position of logos on the printed certificate and other documents can be adjusted using the menu items under Utilities->Set Logo Positions. Choose the item that needs to be repositioned.
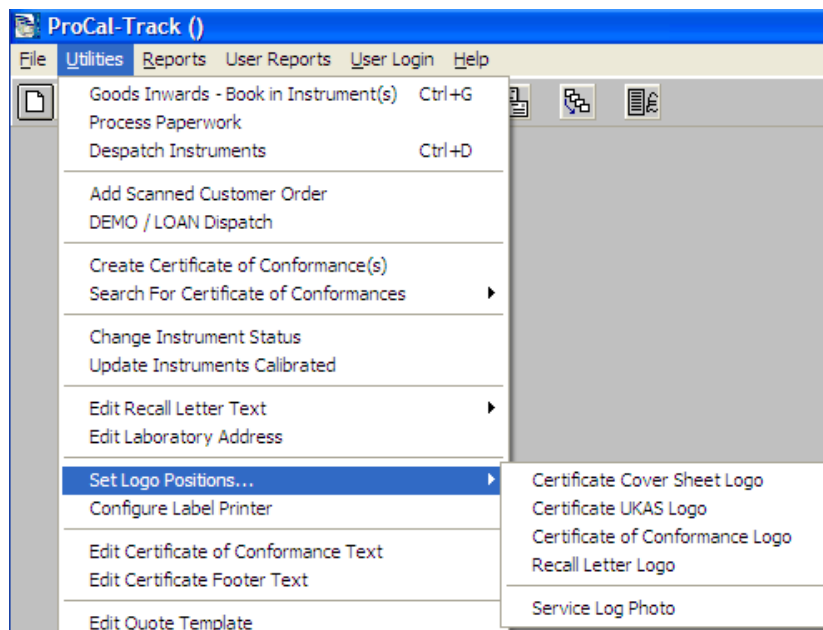
Select the X Position (distance from left of page) and Y Position (distance from top of page) where the logo is to be printed.
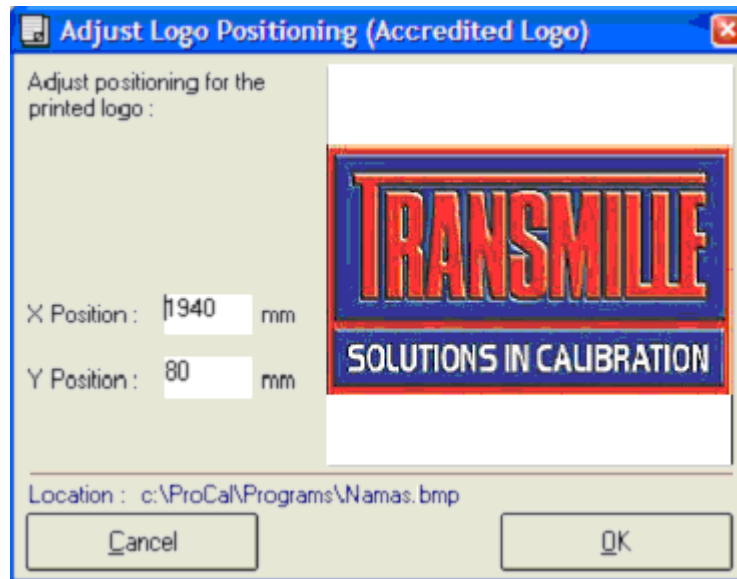
View/Edit Contacts

The contact database contains all details of customer companies and their contact details. The Contact Database can be accessed via Utilities->Edit Contact Database, the menu that appears can be used to edit and delete existing Contacts and also allows you to add new Contacts.

Add a New Contact

To add a new Customer to the database, simply input the details and choose an account number to identify the contact. Once all the details have been entered click "Add/Update Company, this will instantaneously update the system. These new details can be edited or deleted at any time.

Amend existing details

To find an existing Customer, simply select their Account Number or Company Name from the drop-down lists available.

Once their information appears, update any and all details that need amending and click "Add/Update Company". This will instantaneously update the system with those changes.

| |
|---|
| **Note: That if the company name is changed this will create a new entry under the new company name. The old company can be deleted if required.** |

Delete a Contact

To delete a contact simply select either their Account Number or the Company Name, once their details appear on screen click the "Delete Company" button, before it is deleted the system will ask you if this is the correct contact to delete, this is to ensure a contact is not mistakenly deleted.

Print Label

If a Seiko Smart Label printer is available, then labels containing the contact's address may be printed.

Edit Custom Lists

Custom lists contain a set of entries to speed up the input of commonly used items. For example, the manufacturer list contains a set of instrument manufacturers. At several places ProCal-Track will provide the list of manufacturers in a drop-down list:
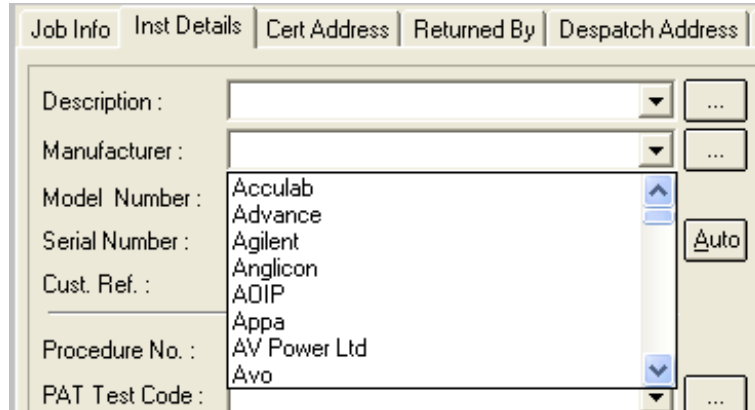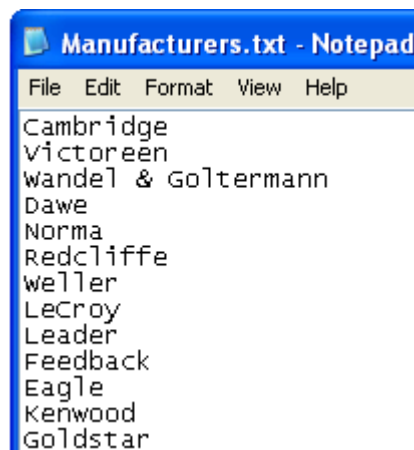

The list is automatically sorted alphabetically.

To edit these lists, select Utilities->Edit Custom Lists to access the menu of custom lists, and choose the list to be changed.
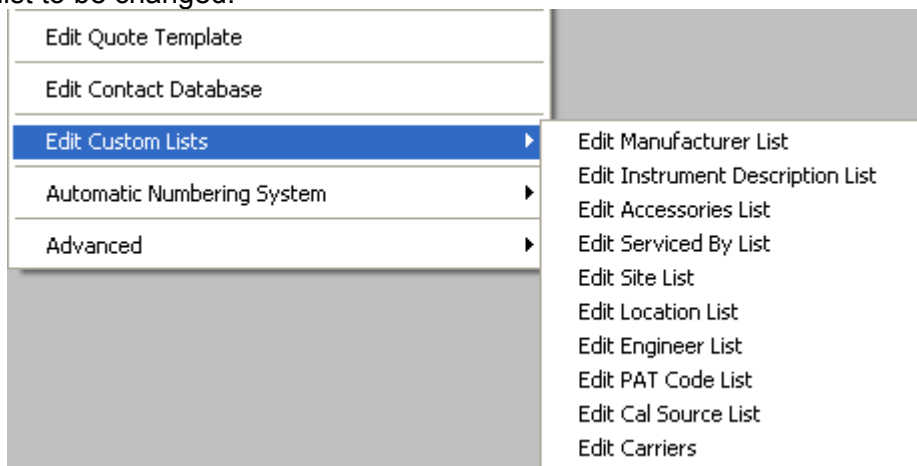
When an item is selected the relevant file is opened for editing. Make any changes required and then save the file.

Change Instrument Status

Some unusual events require an instrument's status to be manually updated. For example, if an instrument is lost sometime during the calibration process its status code must be changed to "D - Lost".

Selecting Utilities-> "Change Instrument Status" from the main menu will show the Update Instrument Status screen.

Enter either a Serial Number, or a Certificate Number or a System ID in the associated text box and click "Find Instrument".

If an instrument is found, choose the new status from the drop-down list.

Generate Recall Letters

When an instrument is about to become due for recalibration, ProCal-Track can generate a letter to inform the customer.
To generate the data for the recall letters click Reports->Generate Recall Letters, this will bring up a sub-menu which asks for the number of weeks notice required for the letters to be generated before the instrument is due for calibration.

To find overdue instruments click yes when the message box appears that asks if you wish to delete the old database and search for new data.

Advanced (Select Specific Customers)

Step 1 contains the option to search for specific customers with instruments that are due to be calibrated or overdue. After all of the customers with overdue instruments have been located by ProCal-Track, the user can then edit this list by clicking Advanced. Within this new window the user can uncheck and check the boxes of the customers they wish to print letters for.
If customers are unselected then it will automatically re-run the search and provide a new list minus those customers.

Printing the Letters

To print the letters, select how many letters you wish to print according to how many customers you have selected, the recall letter is double-sided, so if you do not have a printer capable of this the letters will have to be manually turned over to print the information on both sides.

Edit Recall Letter Text

Selecting Utilities->Edit Recall Letter text->Due Letter will allow the user to edit the text of this letter. Save the file when editing is complete.

When an instrument has become overdue for calibration a second letter is generated. Selecting Utilities->Edit Recall Letter text->Overdue Letter will allow the user to edit the text of this letter.

View Last Generated Recall Letters

Click Reports->View Last Generated Recall Letters, offers the ability to view the last batch of recall letters that were printed. They can also be reprinted via the menu.
This option can help to ensure that all customers have received their recall letters.

Process Paperwork

Enter or Scan Job Number

Selecting Utilities->"Process Paperwork" will open a menu, to continue, enter the job number for which paperwork is to be processed into the text box, or scan the item's barcode. The full paperwork screen will then be shown.
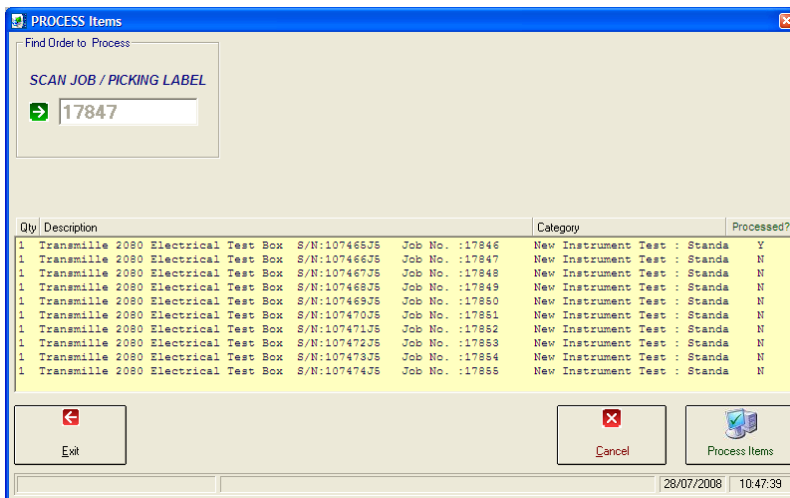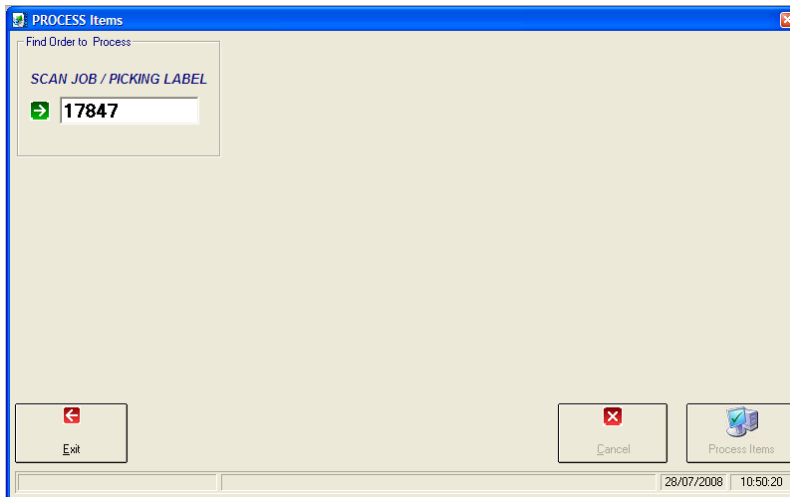

Process Paperwork Item List

A list of items that may be processed is shown. Click on each item in the list to select it for processing. Multiple instruments may be processed for a single order and in one operation.

Print Certificate

Click "Process Items" when all items have been selected. The Print Latest Certificate Screen appears, to allow the selection of what to print on the certificate, the number of copies, and whether labels should be printed.

This will print out an Instrument Service Log and a Certificate of Calibration for each instrument selected and mark the instruments as having paperwork completed. If all the items on an order have been processed then an option to go straight to the Despatch menu will be shown.
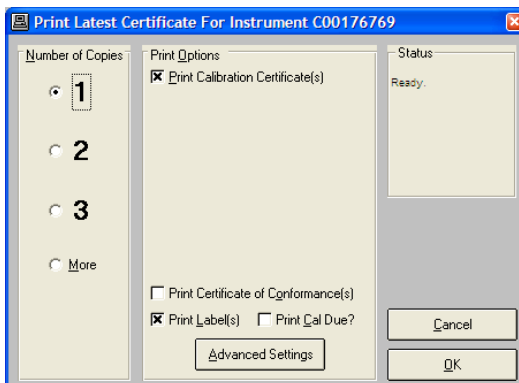
When printing is complete the status of all the instruments processed will move to the next stage, N: in despatch.
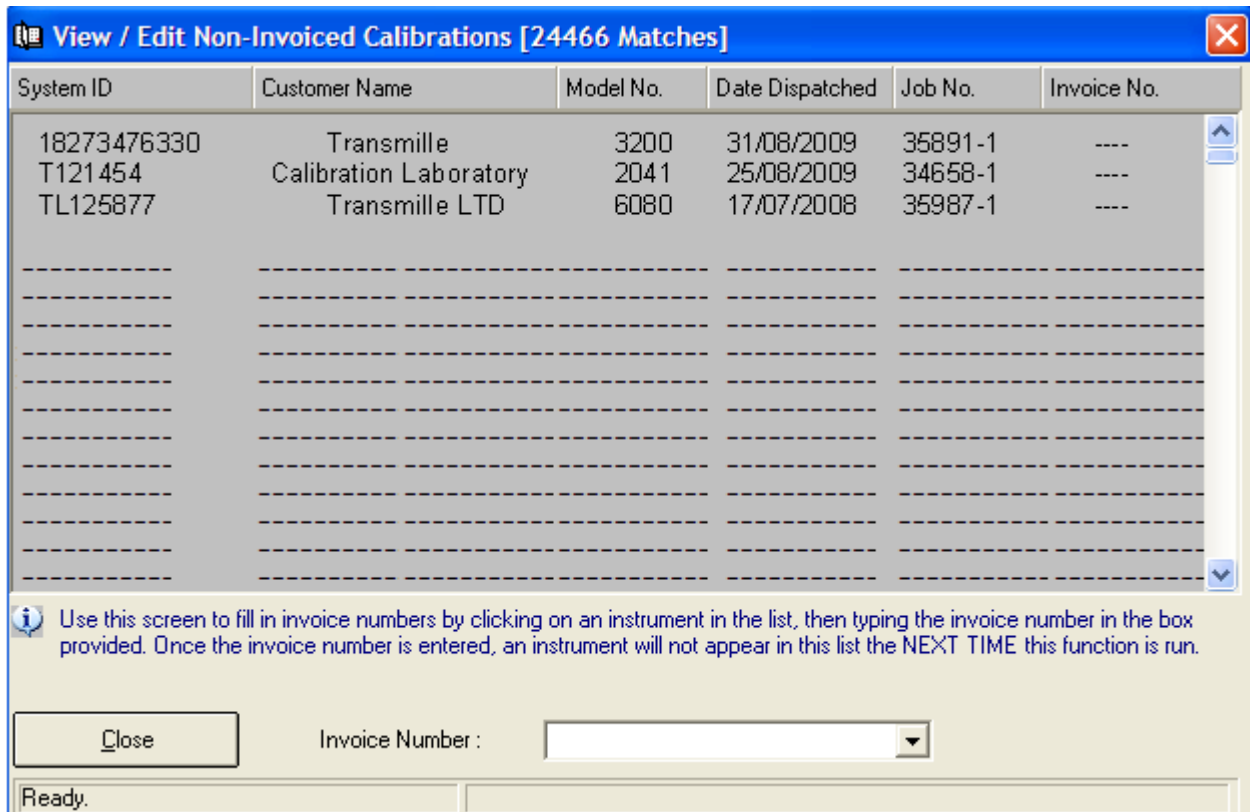
Process Non-Invoiced Calibration

To view a list of jobs where calibration has been completed but an invoice has not been generated, select the menu item Reports-> View Non-Invoiced Calibrations.
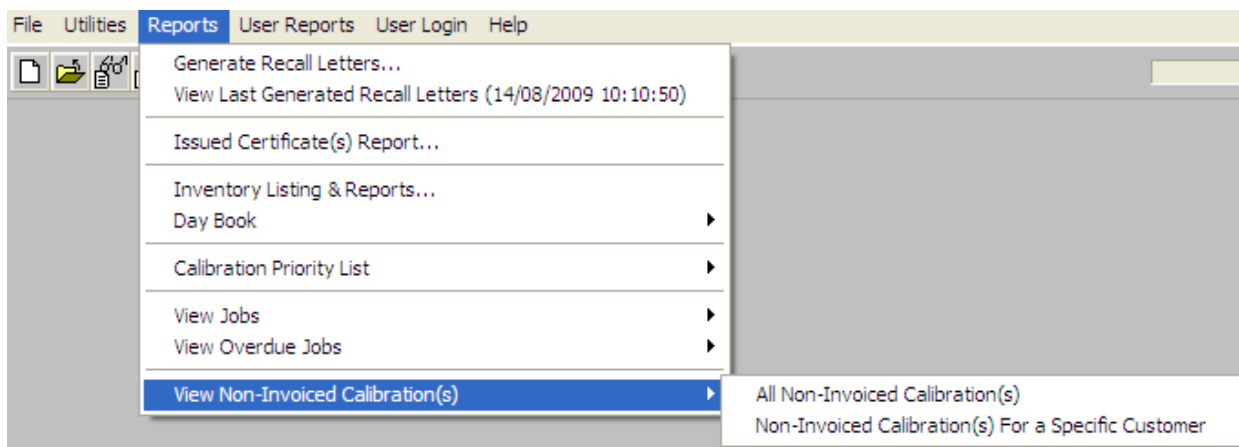
View Non-Invoiced Calibrations

Entering an Invoice Number

Select a job for which an invoice has been prepared. Enter the invoice number in the "Invoice Number" field. That job will now be marked as having been invoiced and will no longer appear as a non-invoiced calibration.

All Non-Invoiced Calibrations For a Specific Customer

Selecting this menu item will prompt for a customer name, and then show all completed calibrations belonging to that customer that do not have an invoice number associated with it.
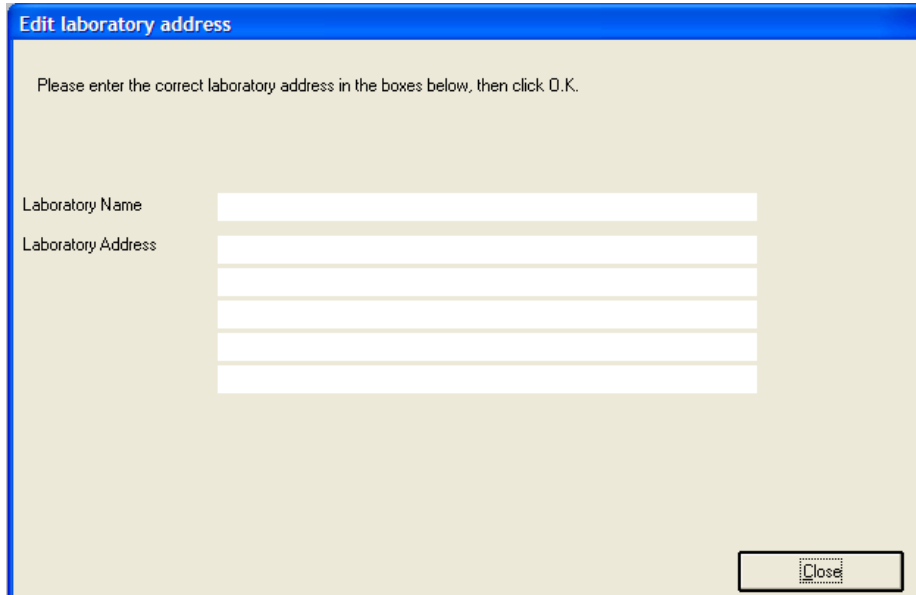
Update Instruments Calibrated

If an instrument is calibrated without using ProCal the calibration status needs to be updated manually. Selecting Utilities-> "Update Instruments Calibrated" from the main menu will show the Update Instruments Calibrated screen.

Enter either a Serial Number, or a Certificate Number or a System ID in the associated text box and click "Find Instrument".

If an instrument is found, change the certificate number, choose the new status from the drop-down list, and change the calibration date and period as required.

Edit Laboratory Address

Selecting Utilities->Edit Laboratory Address, then enter the details for the laboratory. These details will be used when printing certificates and other letters.

Edit Certificate of Conformance Text

Select Utilities-> Edit Certificate of Conformance Text to change the text printed on a certificate of conformance.

Edit Certificate Footer Text

A certificate will usually be printed using a Crystal Reports template that may be edited to include custom text. However if certificates are being printed using ProCal-Track's internal report, a custom footer can be added using the menu item "Utilities- > Edit Certificate Footer".

Automatic Numbering System

ProCal-Track can maintain a number of different automatic sequence numbers. These are automatically generated when an item requires a new identifying number.

To use automatic sequence numbers select Utilities->Automatic Numbering System->Use Auto-Sequence ID. Confirm that the menu item is checked as in the screen below.
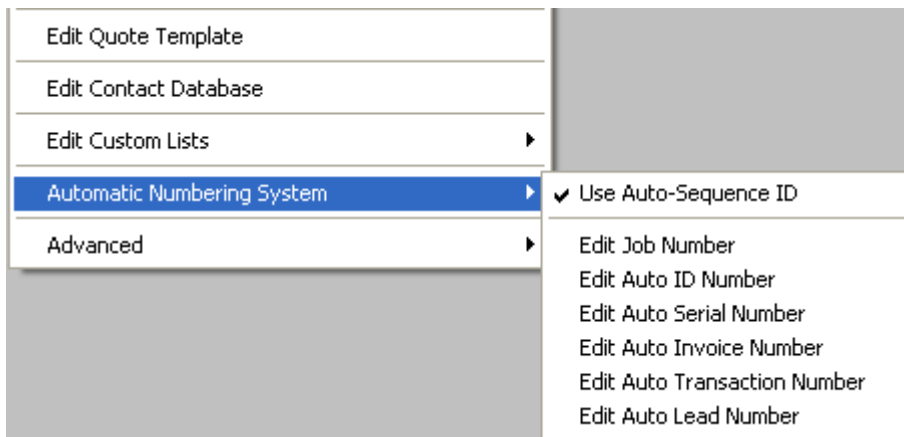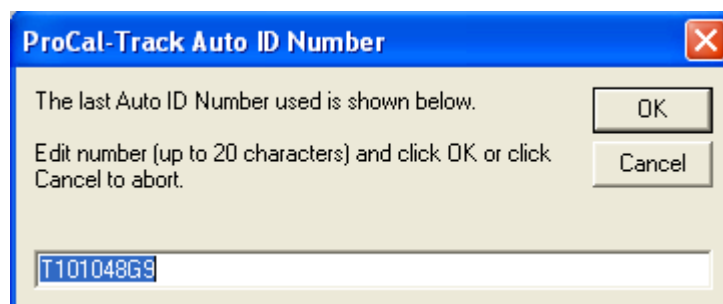
Edit Job Number

The last job number is displayed in the message box. Enter a new job number (this may contain letters and numbers, but must end in a number, up to a limit of ten characters or digits). The next time a new job is created this value will be increased by one and used as the job number.
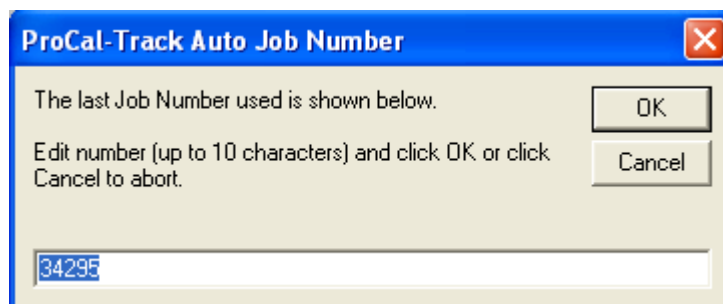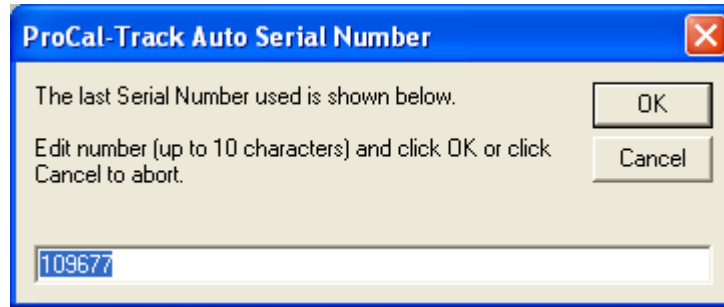

Edit Auto ID number

The last instrument ID number is displayed in the message box. Enter a new ID number (this may contain letters and numbers, but must end in a number, up to a limit of 20 characters or digits). The next time a new instrument is created this value will be increased by one and used as the instrument ID number.
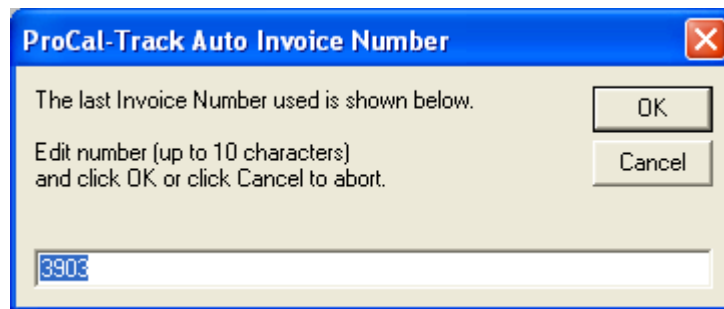

Edit Auto Serial Number

The last serial number is displayed in the message box. Enter a serial number (this may contain letters and numbers, but must end in a number, up to a limit of ten characters or digits). The next

time a serial number is created this value will be increased by one and used as the serial number.
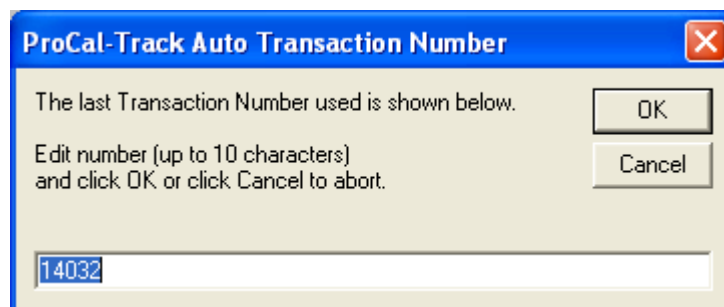

Edit Auto Invoice Number

The last invoice number is displayed in the message box. Enter an invoice number (this may contain letters and numbers, but must end in a number, up to a limit of ten characters or digits). The next time an invoice is created this value will be increased by one and used as the invoice number.


Edit Auto Transaction Number

The last transaction number is displayed in the message box. Enter a transaction number (this may contain letters and numbers, but must end in a number, up to a limit of ten characters or digits). The next time a transaction number is created this value will be increased by one and used as the transaction number.


Edit Auto Lead Number

The last lead number is displayed in the message box. Enter a lead job number (this may contain letters and numbers, but must end in a number, up to a limit of ten characters or digits). The next time a lead number is created this value will be increased by one and used as the lead number.
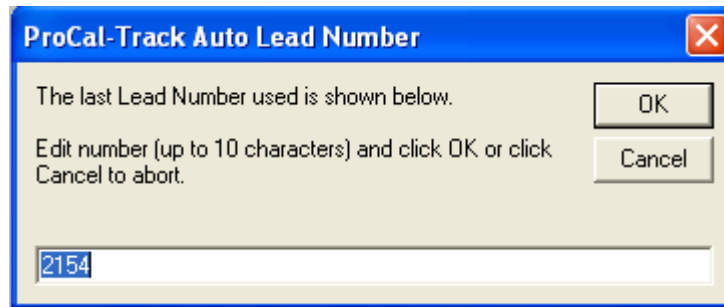
Options

To set options in ProCal-Track, select the menu item Utilities->Advanced->Program Options. A password prompt will appear. If a password has not been set, then the password to be entered will be tcs. After inputting the password, a new prompt will appear asking for the VAT Rate, this can be set to a value of your choice.
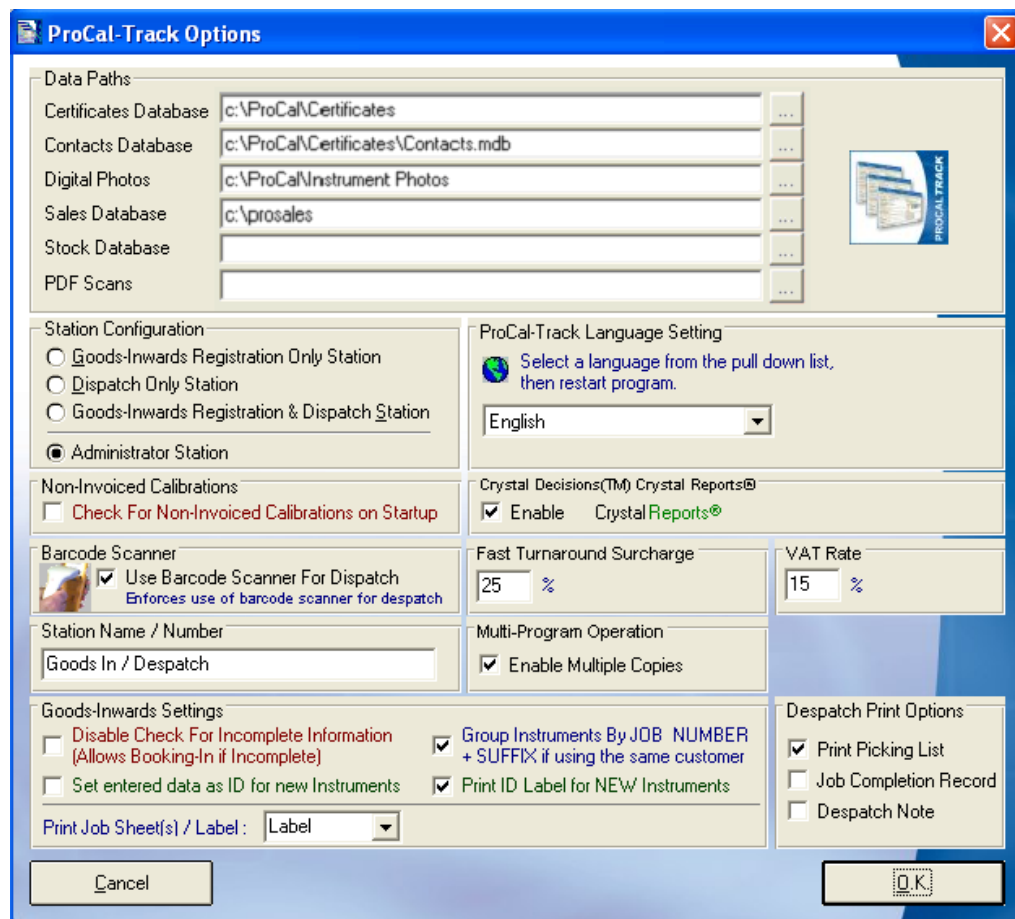
The above image depicts the options available, when configuring ProCal Track.

Data Paths

When the ProCal software suite is installed, the data paths are automatically set to the local drive usually the 'C' Drive. If the software is installed onto a server and not onto a singular workstation, then the paths will need to be manually directed to a single directory to ensure that data is up-to-date across the network.

CERTIFICATES DATABASE

Enter the path to the certificates database. Click the "…" button to bring up a file window and navigate to the location of the database. The database file name will be ProResDB.mdb and is shared with the ProCal programs. This is where all certificate data will be stored, the data path should not be changed unless linking paths and files are also updated.

CONTACTS DATABASE

Enter the file name of the contacts database. Click the "…" button to bring up a file window and navigate to the location of the database.

DIGITAL PHOTOS

Enter the path containing digital photographs of the instruments. Click the "…" button to bring up a file window and navigate to the location of this directory. The digital photographs directory contains a number of bitmap files with the same name as the instrument they illustrate.

SALES DATABASE

Enter the location of the sales database. Click the "…" button to bring up a file window and navigate to the location of the database.

STOCK DATABASE

Enter the location of the stock database. Click the "…" button to bring up a file window and navigate to the location of the database.

PDF SCANS

Enter the location where scanned documents will be stored. Click the "…" button to bring up a file window and navigate to the location of the PDF files.

Data Paths need to be set to allow ProCal and ProCal Track to communicate. If the user has both programs installed then ProCal-Track will read the data from ProCal when writing reports or compiling certificates, therefore the paths need to look to the same file or directory to ensure that reports and certificates can be compiled.

Station Configuration

Each workstation may be configured for a particular role, limiting the operations that can be performed using that computer.
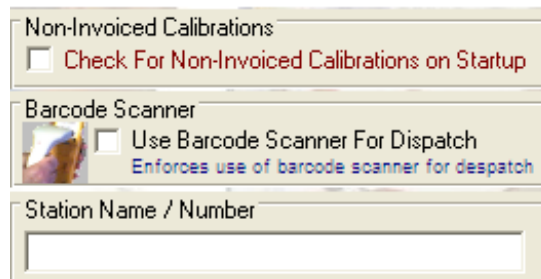
Select whether the workstation will be restricted to goods-inwards only, despatch only, or both. An administrator station has no restrictions and can perform all tasks.

Non-Invoiced Calibrations

Selecting "Check for Non-Invoiced Calibrations on Startup" will prompt the operator to search for all non-invoiced calibrations when ProCal-Track is started.

Barcode Scanner

Selecting "Use Barcode Scanner For Despatch" will disable keyboard input of serial numbers in the despatch process, requiring the operator to scan the barcode on the instrument label. Select this to improve accuracy in a system using barcodes on every item.
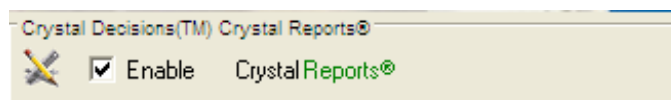
Language Setting

Select a language from the list of translations available. Translations are stored by default in the directory "C:\Procal\Languages" as Access database files named "Language.mdb" (e.g. Français.mdb).
Some translations will be visible once the options screen is left, however the program must be restarted for the language update to be implemented.

Crystal Reports

Select "Enable Crystal Reports" to access a wider range of reports. Crystal Reports allow flexible formatting of results and may be edited to meet customer requirements. Custom reports are available from the main menu of ProCal Track under "User Reports".

Basic information about Crystal Reports can be found in the appendix.
Information on User reports can be found on Page

Multi-Program Operation

By default only one copy of ProCal-Track may run at a time on a single computer. This ensures that problems arising from concurrent editing are minimised. To lift this restriction select "Enable Multiple Copies". This option should only be used on select Workstations to avoid discrepancies and problems.
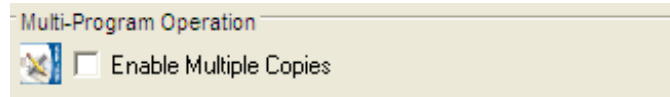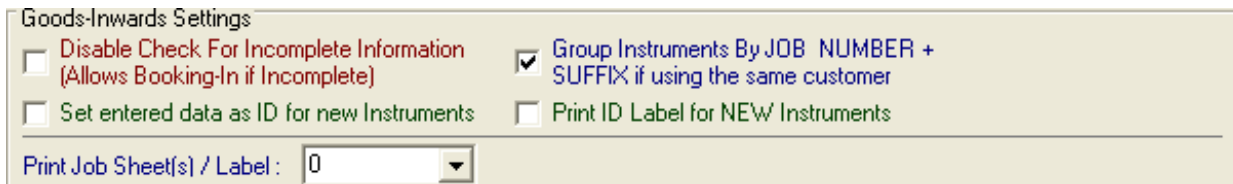
Fast Turnaround Surcharge

If Fast Turnaround is selected when an instrument is checked in a surcharge will be added to the invoice. Enter the percentage increase in the "Fast Turnaround Surcharge" box.
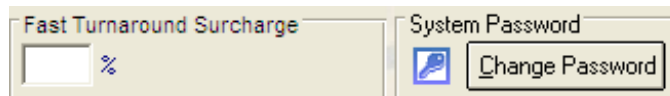
System Password

Click "Change Password" to change the system password, which is required to enter this options screen.

Goods Inwards Settings

Selecting "Disable Check For Incomplete Information" will allow an instrument to be booked in even if its details, the details of the customer and the details of the job to be performed are incomplete.

If "Group Instruments By JOB NUMBER + SUFFIX if using the same customer" is selected, when instruments belonging to the same customer are booked in on the goods inwards screen they will receive a job number of the form JOB001-1, JOB001-2, JOB001-3 rather than JOB001, JOB002.

Selecting "Set entered data as ID for new Instruments" will generate the instrument ID from various characteristics of the instrument. When unselected the instrument ID is a plain number. The instrument ID is used internally by ProCal-Track - select this option if the instrument ID needs to be more human readable.

Selecting "Print ID Label for NEW Instruments" will print a label for any unrecognised new instruments as they are booked in.

Set Options

Click "OK" to confirm changes to program options, click "Cancel" to discard all changes made.

User Access Permissions

Administrators can modify the list of users by selecting the menu item Utilities->Advanced->User Access Permissions. A list of users and their user levels is shown:
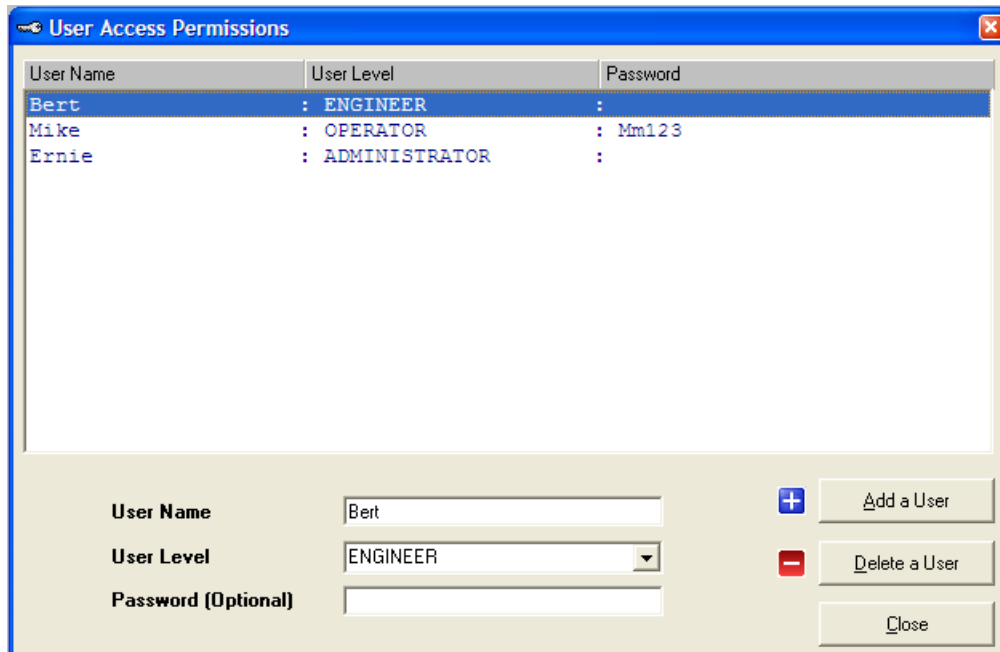
Add a User

Click "Add a User". The new user is now selected, Enter the user name, choose the user level from the drop-down list and choose a password if required.

Edit a User's Permissions

Select a user in the list and select the new user level from the User Level drop-down list.

Delete a User Button

Select a user in the list and click "Delete a User".

Close Button

Click "Close" when user update is finished. If the list is empty ProCal-Track will operate with an unnamed user with the level of Administrator and no password.

Modify Instrument ID Number

If it is necessary to change the system ID number of an instrument, select the menu item Utilities->Advanced-> Modify Instrument ID Number. A menu will appear, which will allow the user to search for the instrument using a variety of information.


A list of instruments matching the search will appear. Select an instrument from the list and click "Modify ID", this will show a box containing the existing System ID for the instrument. Edit as required and click OK. A warning will appear if an attempt is made to change to a system ID that is currently in use.

Reset Status Codes

If ProCal-Track is installed alongside an existing installation of ProCal the results database will contain details of existing instruments. The status codes of these instruments can vary so to ensure correct operation of ProCal-Track the status codes should be reset.
Selecting the menu item Utilities->Advanced->Reset Status Codes will, after asking for confirmation, reset the status code of every instrument to "A – with customer". All new instruments created in ProCal-Track will start with status code A.
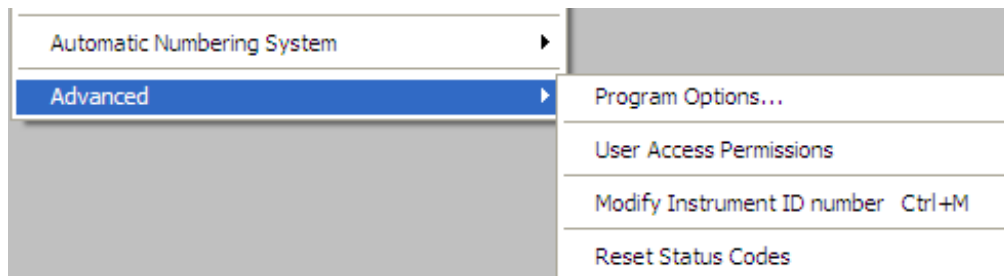
Caution

Do not use this function on an installation of ProCal-Track that has been in production use, as information may be lost.

Issued Certificates Report

To view all the certificates issued through ProCal-Track, Select the menu item Reports-> Issued Certificates Report.

Date Range

From the First Day Of: Select the month on which to start the report

To the last Day Of: Select the month on which to end the report

Start From Year: Select the year of the report.

Certificate Type

Select whether to include standard certification, ACCREDITED certification, or both in the report. It is not possible to select neither.

Exclude Status

Selecting "Exclude Status" removes results with status codes M, Q and R

M: Cal done - awaiting paperwork
Q: Under Construction
R: Allocated to Customer

List All Issued Certificates

Clicking OK will produce a list of all certificates issued in the specified time period.
Click "Print List" to print a report containing these certificates.

To view a graphical representation of certificates issued by month, click "Show Graph". The graph type may be changed and the graph may be printed.
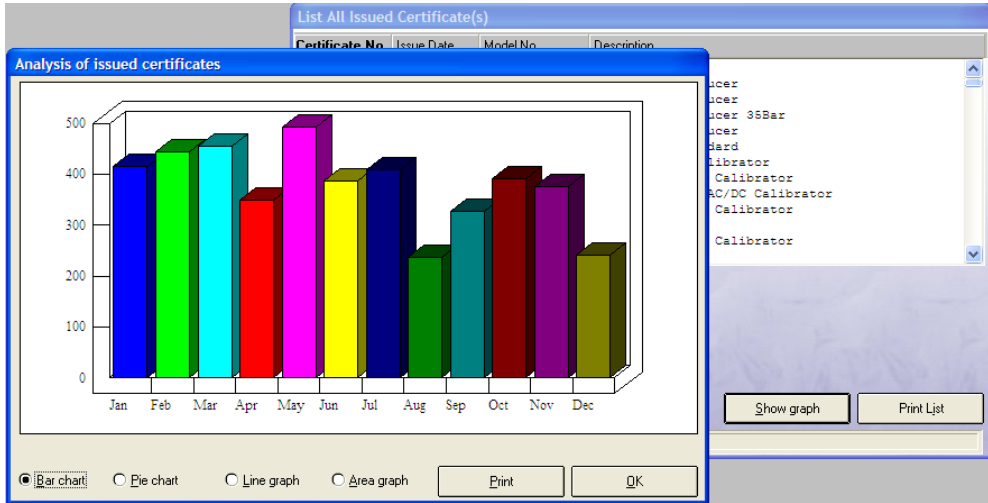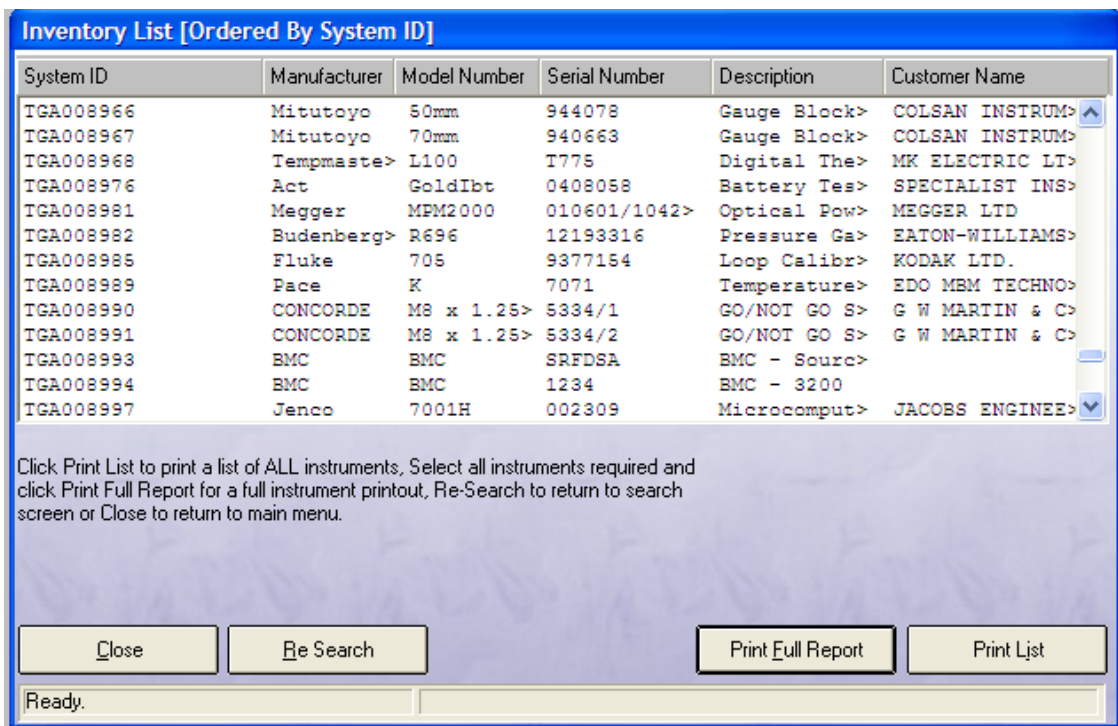
Inventory Listing & Reports

Selecting Reports-> Inventory Listing & Reports to produce reports of instrument inventory. A search screen is shown; select search criteria in the left column and fill in the search terms on the right. To find all instruments select no search criteria.
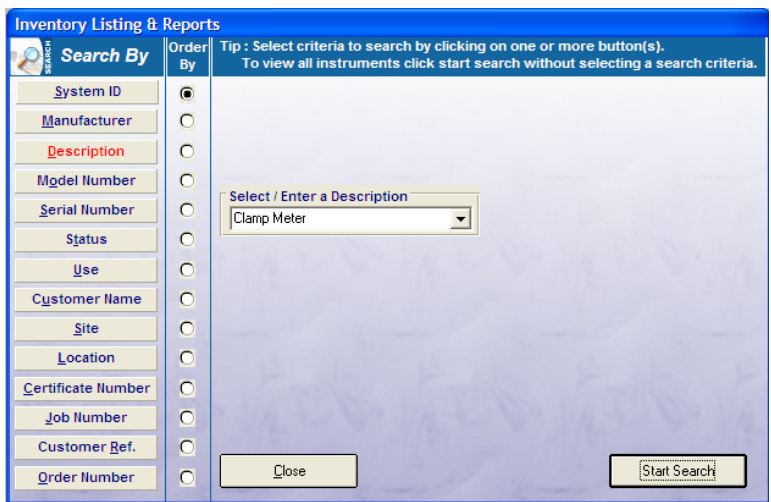
Clicking "Start Search" will bring the following results screen if items are found:

Print Full Report

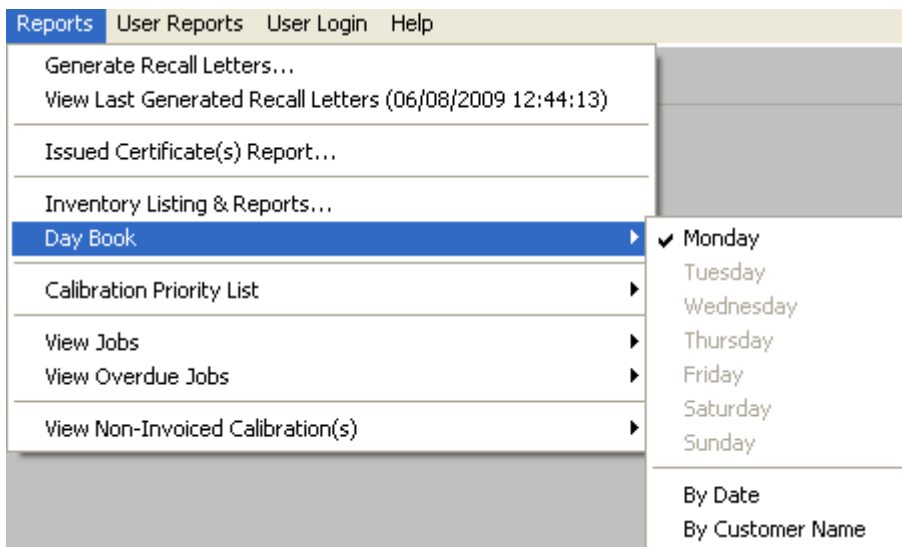Prints a report containing details of all the instruments in the list.

Print List

Prints a report containing all the instruments in the list.

Day Book

The Day Book reports provide a quick way of searching for instruments that have been booked in during the current day or week.

Week Day

Select a day of the current week to find all instruments booked in on that day.

By Date

Enter a date to find all instruments booked in on that day. A range of dates may be specified using wildcards in place of some digits. For example:
??/10/2008   - any day in October 2008
1/*/2008   - first of each month, 2008
25/12/*   - every Christmas

By Customer Name

Enter the name of a customer to search for. Wildcards may be used
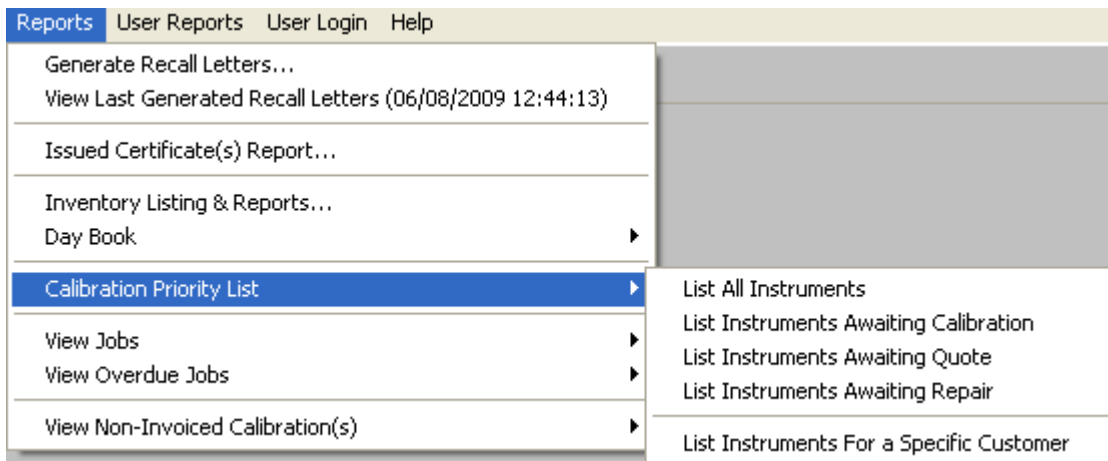(e.g. Trans* matches Transmille, TransCal, etc)
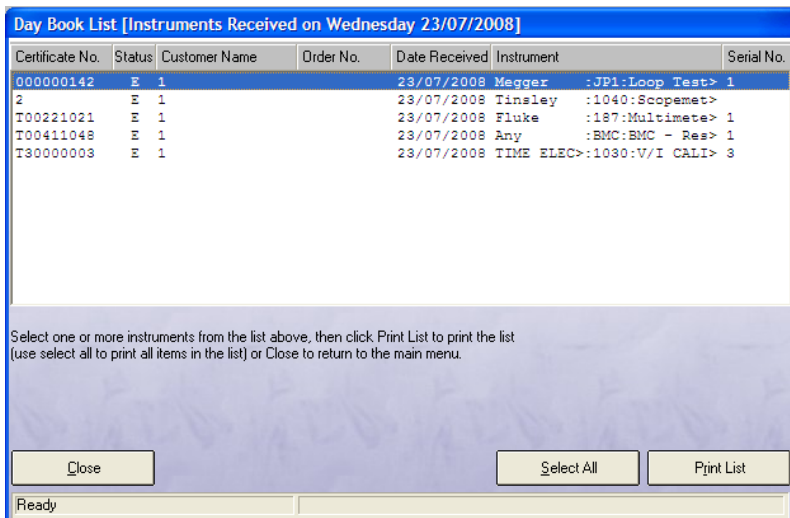
Print List

Click "Print List" to print a report containing all the instruments booked in on the selected date.

Calibration Priority List

The calibration priority list reports show all instruments that are awaiting work.

List All Instruments

This menu item shows all instruments awaiting calibration, a quote or repair.

List Instruments Awaiting Calibration

This menu item shows all instruments awaiting Calibration (with status code E).

List Instruments Awaiting Quote

This menu item shows all instruments awaiting a quote (with status code F).

List Instruments Awaiting Repair

This menu item shows all instruments awaiting repair work (with status codes K or L).

List Instruments For a Specific Customer

This menu item shows all overdue instruments belonging to a specific customer. If wildcards are used in the customer name, more than one customer can be matched.

Instrument Calibration Priority List

This screen shows the instruments due / overdue in the category chosen. Double-click on an instrument to go to that instrument's job sheet.

View Jobs

To view a list of current jobs, select the menu item Reports->View Jobs.
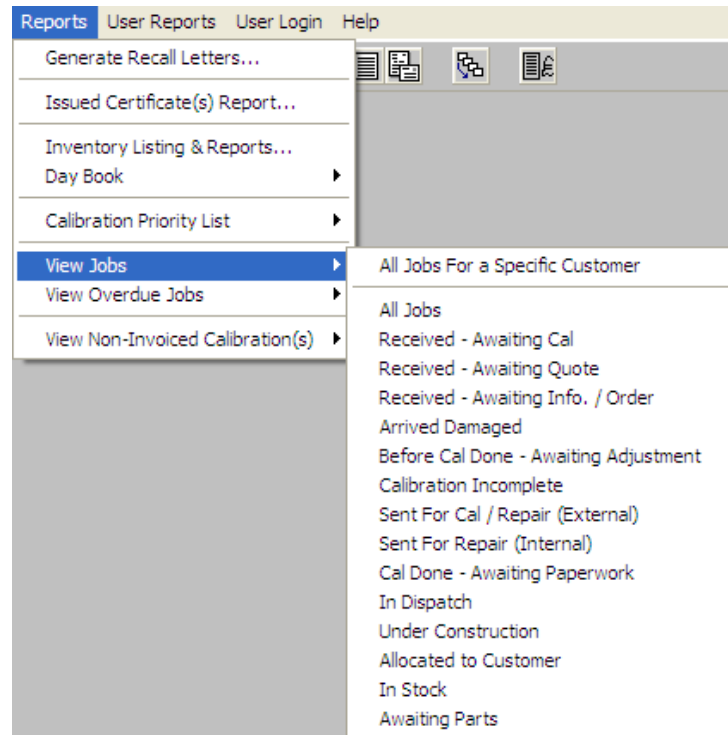
All Jobs For a Specific Customer

Enter the name of a customer to search for. Wildcards may be used to select multiple customers (e.g. Trans* matches Transmille, TransCal, etc). The job list will contain only jobs for that customer.

All Jobs

Select All Jobs and the jobs list will contain all active jobs.

Status Codes

Select a status and the jobs list will contain all jobs with that status.
The statuses that can be chosen are:
Received – Awaiting Cal
Received – Awaiting Quote
Received – Awaiting Info. / Order
Arrived Damaged
Before Cal Done – Awaiting Adjustment
Calibration Incomplete
Sent for Cal / Repair (External)
Sent for Repair (Internal)
Cal Done – Awaiting Paperwork
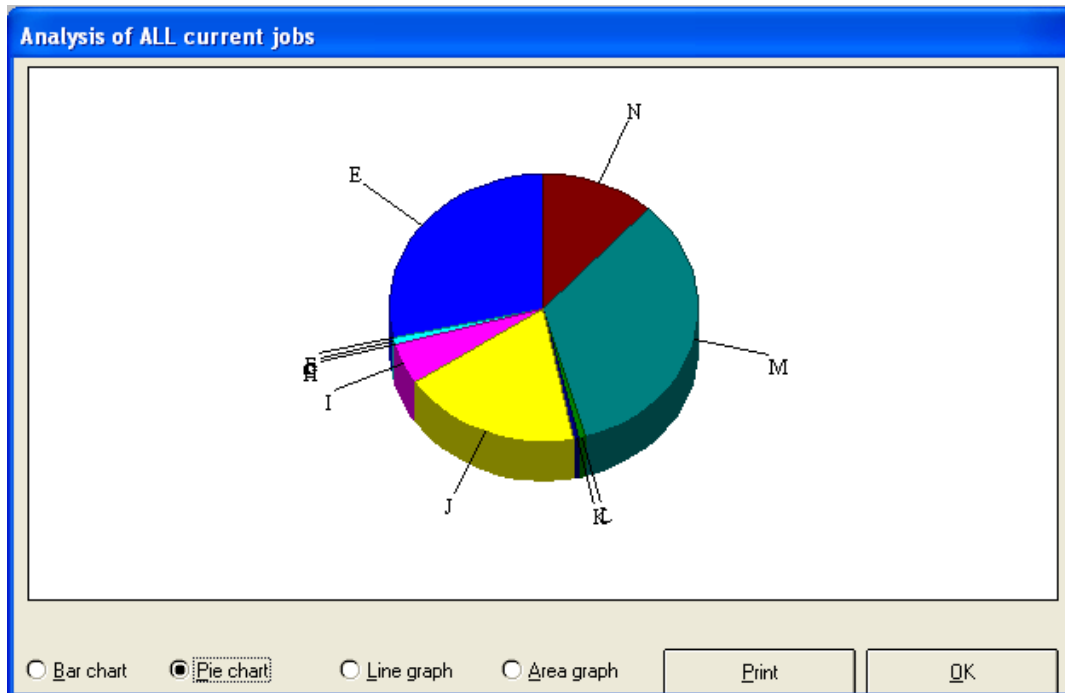In Despatch
Under Construction
Allocated to Customer
In Stock

Awaiting Parts

Print List

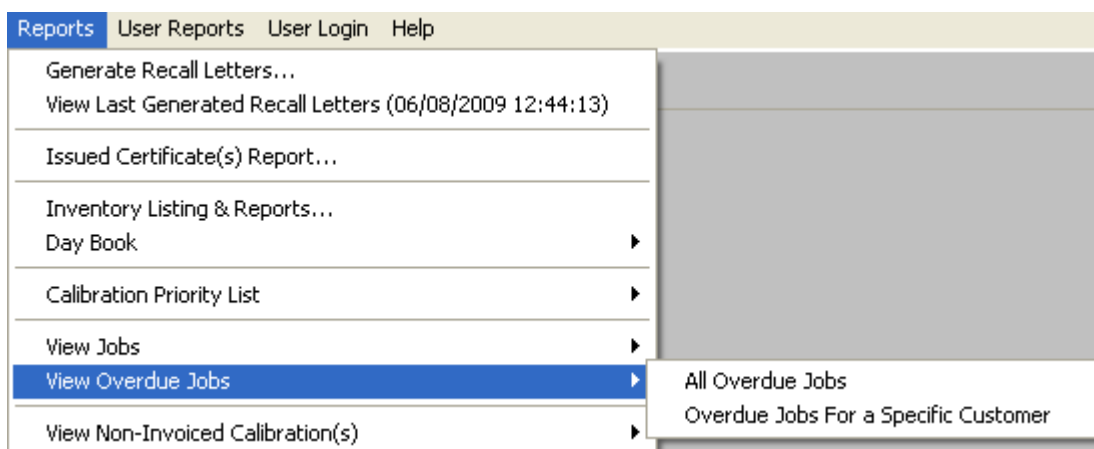Click "Print List" to print a report containing details of the listed jobs.

Show Graph

Click "Show Graph" to see a graphical representation of the distribution of status codes amongst the jobs in the list.
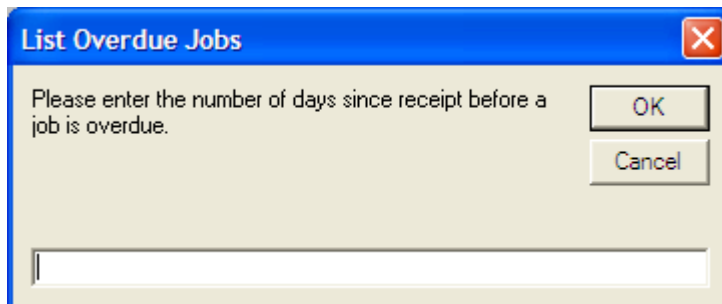

View Overdue Jobs

To view a list of overdue jobs select the menu item Reports->View Overdue Jobs.
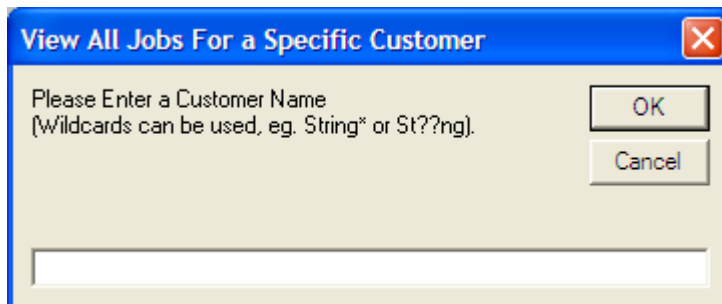
All Overdue Jobs

Select this menu item to view all overdue jobs. Jobs will be classified as overdue a certain number of days from receipt of the instrument. Enter this number when prompted.

Overdue Jobs For a Specific Customer

Select this menu item to view all the overdue jobs for a customer. Jobs will be classified as overdue a certain number of days from receipt of the instrument. Enter this number when prompted. Then enter the customer name when prompted.

Overdue List

This is the menu that will appear after entering the customer name you wish to search for instruments by. This list can then be printed out, or the data can be transformed into a graph and then be printed out.

Print List

Click "Print List" to print a report containing details of the listed jobs.

Show Graph

Click "Show Graph" to see a graphical representation of the distribution of status codes amongst the jobs in the list.
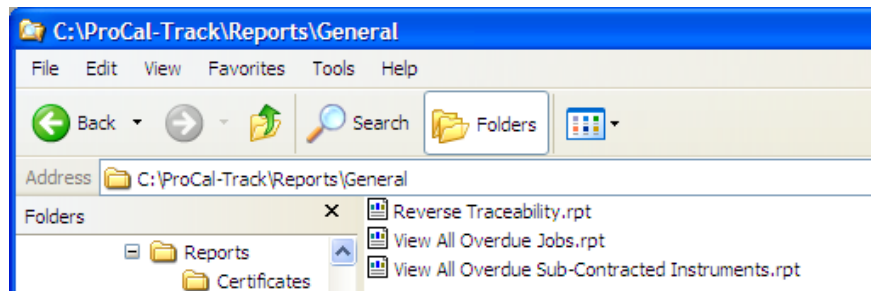
User Reports

The user reports menu provides access to user-generated reports created by Crystal Reports. Crystal Reports must be enabled in the program options for this menu to be visible.

Reports added to the ProCal-Track\Reports directory
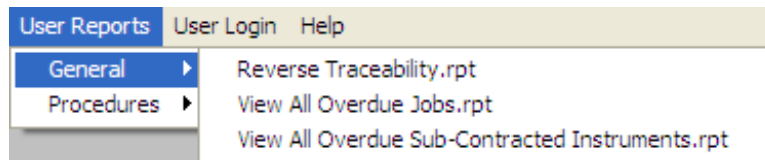
Can be accessed from the User Reports menu within ProCal-Track.

Crystal Reports

The Crystal Reports software can be used to produce templates for Fault Reports, Despatch Notes, and Certificates etc. This software can be used to create specific or unique templates; this can be done from scratch, or by using the in-built wizard.

The Crystal Report Templates are automatically used when by ProCal-Track when compiling reports and certificates, if the user accesses a virtual job sheet, these reports can be accessed via the Print Menu->Reports, a specific report is then accessed via one of four options:
Instrument – Repair Estimates, Sub-Contract despatch etc.
Procedures – Calibration Worksheet, Performance Verification etc.
Certificates – ACCREDITED Certificates, Dimensional ACCREDITED
Advanced Certificates – Test Report, Standard Certificate etc.
Within each of these four options are multiple choices for the type of certificate and report that can be printed for an instrument.
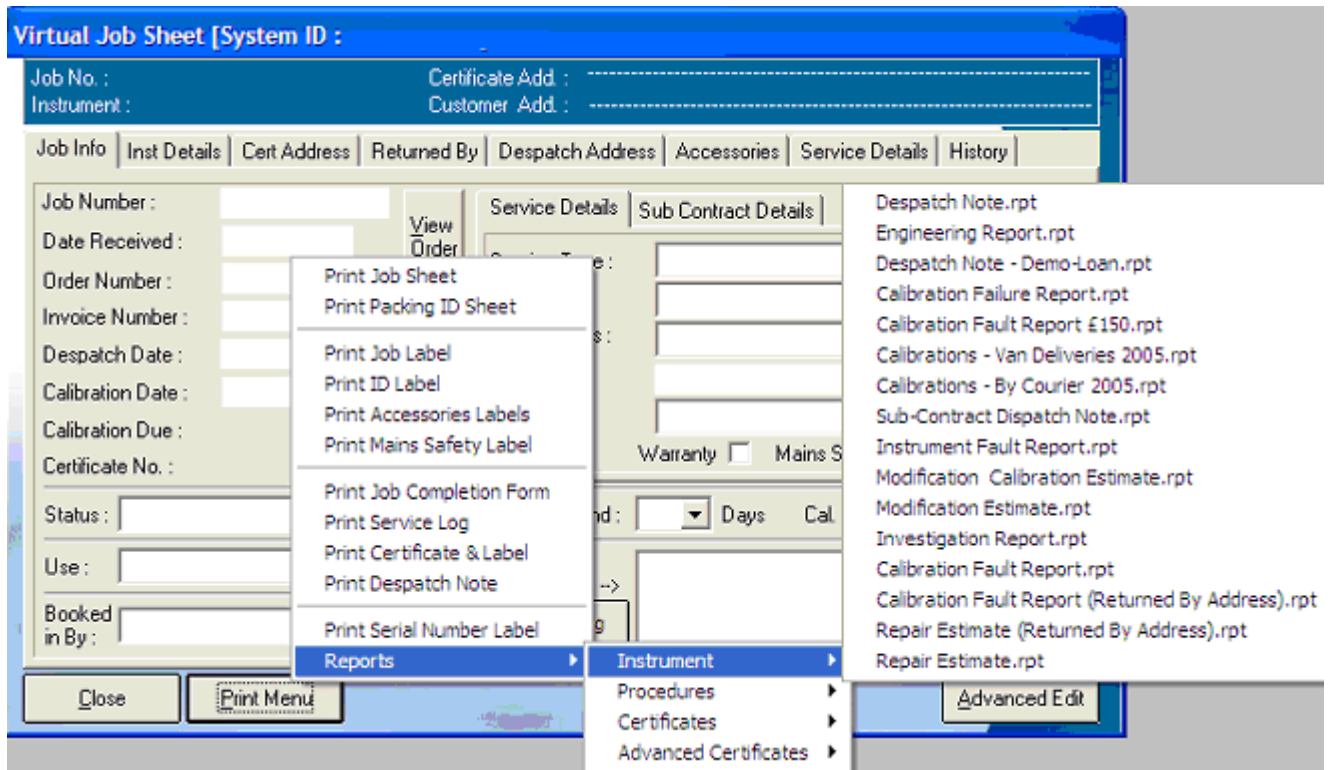
Note: Preset templates are provided within ProCal-Track. Transmille can provide the Crystal Report Software for a fixed price if requested.

Import Instrument Images

Images of instruments can be added to the database to aid identification during the Booking in process. Software capable of taking images will be needed as well as a web cam or a camera. The option of a web cam is more advisable as it will be linked to the computer and can automatically transfer the photos to the chosen imaging software, where it can be saved onto the system.

Note: A system of naming should be chosen such as identifying the images via the instruments model numbers. This is very important, as it will ensure that multiple copies of images don't overload the database.

Note: Transmille uses Paint Shop Pro 6 to take and save images of instruments. Users will need a web cam and a piece of software that will allow the taking of and saving of images.

Appendix

Scanning Documents

Once the ProCal software suite is installed, certain paths such as the location of scanned images will be automatically set to the local drive in this case it should be C:\ and will have the path name C:\ScanTemp. Once the scanner has been linked to ProCal via the program options for the scanner, all scanned images will be stored in a temporary file, to link these files to a customer or instrument simply click link to order during the booking in process, or via Utilities->Add Scanned Customer Order in ProCal-Track. More information can be found below or on Page 42.

Add Scanned Customer Order

If a document scanner is available a scan of the customer's order as a PDF file may be linked to a customer order entry in the database. First the customer order must be scanned into the temporary scanner files directory (default: c:\ScanTemp). Then select the menu item "Utilities->Add Scanned Customer Order" will take the most recent PDF file in the scanner directory; rename it to the order number and copy to the storage directory for scanned orders. The customer order can now be viewed from the job sheet.

Data Paths

The below paths are automatically set upon installation of the software

Certificates Database

C:\PROCAL\CERTIFICATES

Enter the path to the certificates database. Click the "…" button to bring up a file window and navigate to the location of the database. The database file name will be ProResDB.mdb and is shared with the ProCal programs. This is where all certificate data will be stored, the data path should not be changed unless linking paths and files are also updated.

Contacts Database

C:\PROCAL\CERTIFICATES\CONTACTS.MDB

Enter the file name of the contacts database. Click the "…" button to bring up a file window and navigate to the location of the database.

Digital Photos

C:\PROCAL\INSTRUMENTPHOTOS

Enter the path containing digital photographs of the instruments. Click the "…" button to bring up a file window and navigate to the location of this directory. The digital photographs directory contains a number of bitmap files with the same name as the instrument they illustrate.

Sales Database

C:\PROSALES

Enter the location of the sales database. Click the "…" button to bring up a file window and navigate to the location of the database.

Stock Database

Enter the location of the stock database. Click the "…" button to bring up a file window and navigate to the location of the database.

PDF Scans

C:\SCANTEMP

Enter the location where scanned documents will be stored. Click the "…" button to bring up a file window and navigate to the location of the PDF files.

Status Codes

With Customer
Requested for cal
Overdue
Lost
Received awaiting cal
Received waiting quote
Received waiting order
Arrived damaged
As found calibration done
Calibration Incomplete
Sent for cal. / repair (external)
Set for repair (internal)
Cal done - awaiting paperwork
In despatch
Requested (Posted)
Overdue (Posted)
Under Construction
Allocated to Customer
In Stock
Awaiting Parts
A. Action Required

Service Type Codes

Calibration Only
Repair Only
Repair & Calibration
Modification
Investigation
Calibration (no adjustment)
New Instrument Test
Inspection Test

Certificate Type Codes

Standard Certificate
Accredited Certificate
Certificate of Conformance
Electrical Safety Test
Test Report
None

Use Codes

Demo/Loan
Hire
Sale Or Return
Laboratory Standard
Beyond Economical Repair
Quarantined

Advanced Edit

Advanced Edit can be found on all virtual job sheets, to manoeuvre to this menu, click File->View/Edit an Instrument, enter the identifying number such as an instruments serial or job number, when the instrument details appear, double click them, or highlight them and click View/Edit.

 Once this menu appears, click on Advanced Edit to change more intricate details about the instrument, such as the signatory for the certificate, or the traceable instruments used during its calibration.

All the details of an instrument can be changed in this menu, so care should be taken that important data is not lost, this function can be set to Administrator Access only. The list of enterable data is long; this list contains the information for every part of the instruments procession through Booking In, Calibration and its Despatch details.

Certificate Number

If an instrument has been subcontracted out to an external company, then upon its return, the certificate will need to be linked to the instruments details, go into the Advanced Edit of that instrument, highlight 'Cert_No' by clicking it, and then type the certificate number into the text box below, once the information has been entered click "Save Changes" and then "Yes". For a sub-contracted instrument it is advisable to also scan and link the certificate to the instrument.

Editing Signatories

To edit the signatory of a certificate, the same method is followed as for entering a Certificate Number, search and open the Job Sheet of the required instrument, open The Advanced Edit menu, and scroll down, highlight the line data that needs to be entered, and type the information into the text box.

Editing Traceable Instruments

The same process can also be applied for editing the traceable instruments that were used during the calibration process. As the image below shows, each traceable instrument has its name, serial number, certificate number, the date that instrument was calibrated, and the calibration period.

Note: Once Save is clicked, any changed data will be saved and could affect certificates, reports, and can change information such as despatch addresses, therefore it is wise to operate within Advanced Edit with care.

Note: Only a user with administrator access will have the Advanced Edit function available to them on a Virtual Job Sheet, both the engineer and the operator are unable to access this menu.

Editing Drop Down Menus/ "…"

Each drop down menu will have a button next to it with three dots "…", once clicked this button will open up a text file in Notepad, once the changes have been made save and close the text file. For the changes to appear in the drop down menu, the screen that is being worked from must be reset.

Note: The program will not need to be reset, only the current screen or menu will need to be closed and reopened.

Contact Us

If you have any queries or problems, feel free to contact us by one of these routes: -

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All of these details and more can be found at our website www.transmille.com