GAGEtrak® Lite

Version 8.1 Getting Started Guide

CyberMetrics®

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Welcome

Welcome to GAGEtrak Lite. GAGEtrak Lite provides effective gage, calibration and procedure management as well as streamlined reporting, all within a simplified, touchscreen-friendly interface. Because GAGEtrak Lite is touchscreen-friendly, it gives you the option to deploy as a standalone solution on a Windows tablet or on a standard PC and innovative split-screen views give each user the flexibility to simultaneously display record details and a data grid.

Transitioning to GAGEtrak Lite calibration software is quick and easy, whether you're starting from scratch or need custom data import services. GAGEtrak Lite installs in minutes and with its simple interface and cloning tool, you can begin entering and tracking your devices right away.

Using GAGEtrak Lite instead of spreadsheets, index cards or the like, will not only help you improve efficiency, avoid common mistakes and reduce costs, but will also help you assure compliance with international quality standards and pass future audits with ease.

As you read through this guide, keep in mind that the screenshots shown may differ slightly from your software, depending on your operating system and settings.

Let's get started!

Chapter One: Installation

Before installation, it is recommended to close all other programs.

System Requirements

Recommended Hardware and OS Requirements

- Windows 7, 8 or 10 (64 Bit recommended)
- Microsoft 4.7 .NET (provided if not installed)
- Hard disk with 350 MB of free space
- 4 GB RAM required; 8 GB recommended
- Pentium 2.0 GHz CPU required; 3.00 GHz or higher recommended
- Display: 1920 x 1080 (16:9 widescreen) for optimal presentation or in 4:3 aspect ratio, 1280 x 1024 minimum
- Mouse or compatible pointing device
- Ink-jet or laser printer for printing reports (reports can also be emailed as PDF files)

Network Requirements (Optional - only for multi-user networking)

- Local Area Network
- Wide Area Network (10 Mbps or better recommended)

SQL Server Database Requirements (Optional)

- Microsoft SQL Server 2016 (32 Bit or 64 Bit)
- Microsoft SQL Server 2014 (32 Bit or 64 Bit)
- Microsoft SQL Server 2012 (32 Bit or 64 Bit)

How to Install

1. Whether you have downloaded your software or requested it on physical media, launch the GAGEtrak Lite executable (.exe) file; the **GAGEtrak Lite Setup** screen will open; simply click **Install** to begin.

2. Follow the on-screen instructions to complete the installation of GAGEtrak Lite.

3. During installation, the **Data Utility** will open in order to create the database you select. In the **Connection Name** field, name your database. Select the appropriate **Data Source Type** (use Standard unless instructed by your IT team to select Microsoft SQL Server). The **Database File Name** field is automatically populated; use the default value unless instructed otherwise. Click **Next**.

4. When this process is complete, click **Finish** to close the **Data Utility** window.

5. Launch GAGEtrak Lite by locating its program group in the program list in the Windows Start menu.

If Installation Fails

If, for any reason, you can't install your software or you receive any error messages during installation, try reinstalling. If installation fails again, please write down any error messages and call tech support at 1-800-777-7020 for further instructions.

License Registration

A trigger code is required to register your GAGEtrak Lite license. After installation, obtain this code using the instructions below. If this is not completed within 30 days of installation, the software will inform you that the trial period has expired; obtaining a trigger code will remove this expiration. Follow these instructions at each workstation on which GAGEtrak Lite is installed.

1. In GAGEtrak Lite, click the application icon ▐▜▀▀ in the upper left corner and then go to **Help -> About**. In the **About** window, enter the **Serial Number** that is located on a sticker within your product packaging and then click the **Register License** button; the **Register License** window will open.

2. Click the **Get Trigger Code Online** button or open a Web browser window and go to: http://www.cybermetrics.com/onlinetriggers. Enter the required information on the web page and then click **OK**. On the next screen, enter the **Code Entry** and **Computer ID** numbers from GAGEtrak Lite's **Register License** window and click **Get Code**.

3. Your trigger code will then be displayed; copy it and paste it into the **Trigger Code** field in GAGEtrak Lite's **Register License** window and then click **OK**.

4. Click **OK** on the confirmation message and then click **OK** in the **About** window.

Your license will remain registered for the current Windows account on the workstation even if GAGEtrak Lite is reinstalled in the future. If you have any difficulty generating a trigger code, please contact tech support at 1-800-777-7020 or support@cybermetrics.com.

How to Uninstall

To uninstall, go to the **Windows Control Panel -> Programs and Features -> Uninstall or change a program**, select GAGEtrak Lite and click **Uninstall**. Once it has been uninstalled, simply remove the program group from the Start Menu and delete the GAGEtrak Lite directories.

Windows 7, 8 and 10 users: by default, GAGEtrak Lite installs in C:\Program Files (x86)\CyberMetrics...

The install directory can be modified during installation, so a different destination directory may have been selected.

Chapter Two: Program Conventions

To save time and ensure consistency, GAGEtrak Lite uses program conventions, which are standard commands and design elements that make the different windows and forms operate in the same way. You should become familiar with these conventions before you begin using GAGEtrak Lite.

Help Menu

Click the application icon ▐▜▆▜▆▐ in the upper left corner of the program window and select **Help**. The following options are available:

|	
i	Select **About** if you want to see information about the program, such as technical support contacts, software version number and database, license and system information.
?	Click the **Help** icon to view GAGEtrak Lite's Help System (same content as the user guide). Use the **Search** tab to find a specific term, select a topic from the **Contents** tab or browse an alphabetical list of topics in the **Index** tab.

Navigation Menu

The navigation menu can stay visible at all times or it can be undocked (by clicking the pushpin icon) to access it only when needed, opening up more workspace.
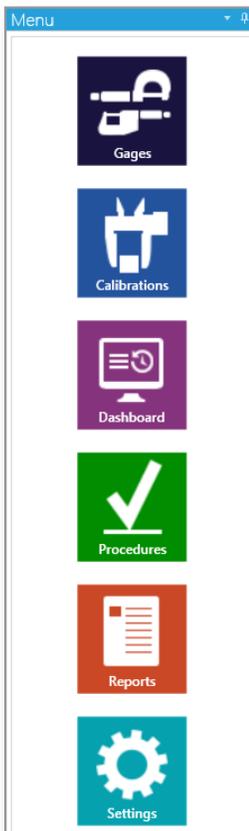
Tools Menu

Available in all entry screens, the **Tools** menu (in the Ribbon) contains common program functions and by default, is minimized. Click **Tools** to temporarily access the menu or to make it remain open, right-click anywhere in the bar that contains the **Tools** menu and deselect **Minimize the Ribbon**:
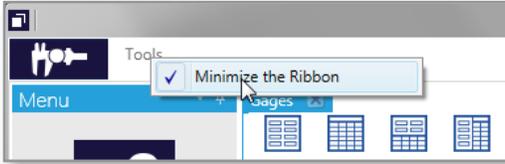

This makes the Ribbon visible:

Use the **Save** function here (or Ctrl + S) to save all record modifications.

Master Tabs

The **Master Tab** feature permits multiple forms to be simultaneously open, for instance, **Gages**, **Calibrations** and **Procedures**, so that you can quickly switch back and forth between them. You can even have multiple instances of the same tab open at once, like **Gages**, to compare gage records or view the records in different formats. The tab highlighted in blue is the active tab.
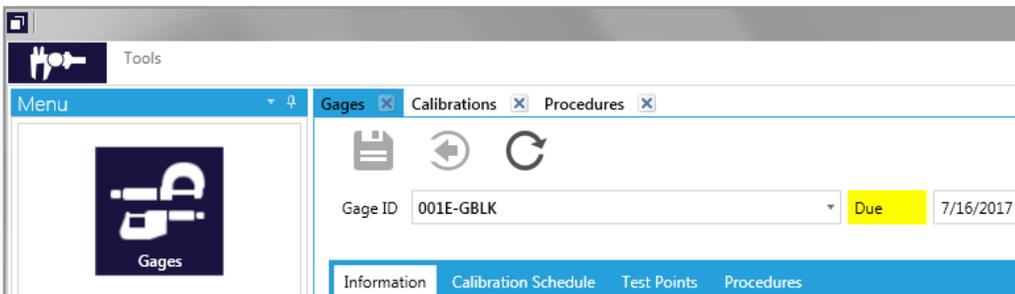
Record Navigation Bar

Use the record navigation bar to navigate through your records. The main record navigation bar is located at the bottom left corner of the form; the record navigation bar for a subset of records is located toward the top of the subset record.

From left to right, the record navigation buttons perform the following functions:

- Go to the first record in the data set.
- Go to the previous record in the data set.
- Go to the next record in the data set.
- Go to the last record in the data set.
- Add a new record.
- Delete the current record (deletion confirmation will ensue).

Record View Options

GAGEtrak Lite provides various options for viewing records: details view, grid view and split-screen views (horizontal or vertical) that simultaneously display record details and a data grid. Details View displays one record at a time; grid view displays several. The view that was most recently selected will be retained as the default view the next time you open that entry screen.

Details View

To see the Details View of any record, click the **Details View** icon: ▦. Shown here is the Details View of **Gages**.
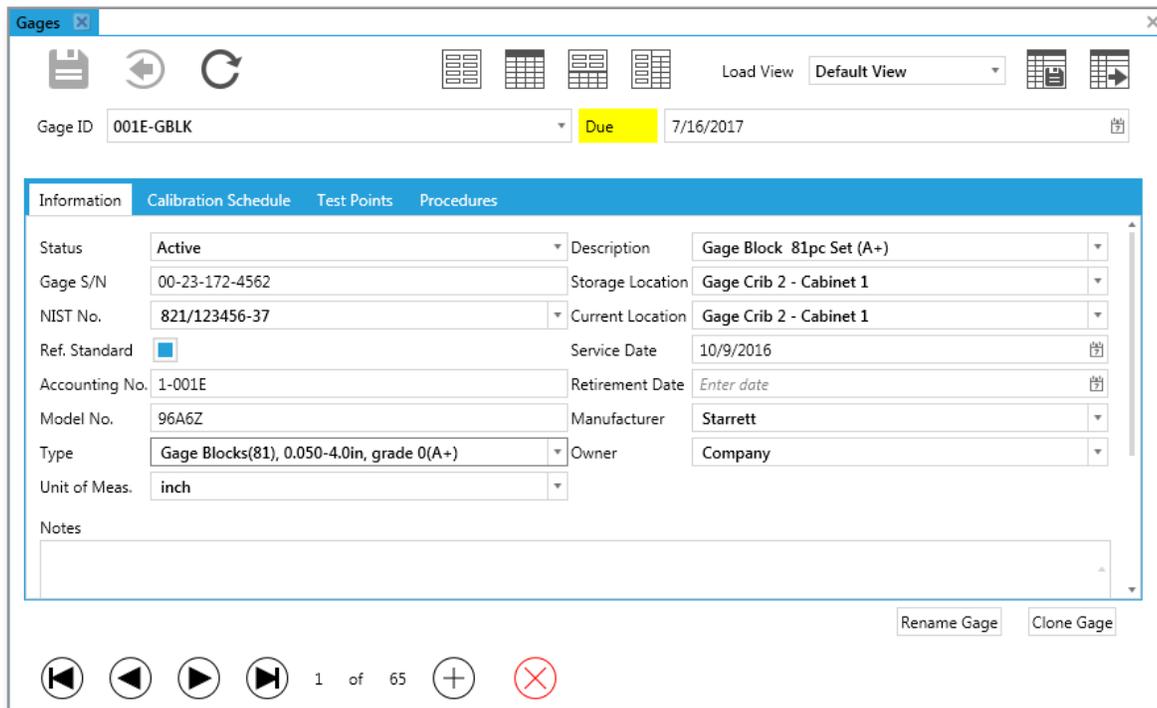
Grid View

Click the **Grid View** icon ▦. Grid View operates similarly to a spreadsheet program, displaying many records at once, so it can be a more efficient interface for adding or modifying your records. Each row represents a record and each column represents a field. In Grid View, you can add, change and view records, resize column widths, filter records, group records and rearrange column positions.

Click on a row to select that record. If you were to then click the **Details View** icon, you would see the Details View of that record. When a record is selected, you can delete it by clicking the **Delete** icon in the record navigation bar; deletion confirmation will ensue.

Double click in a field to alter the contents of that field. Always save record modifications by clicking the **Save** icon 💾.

To change the width of a column, click a column gridline and drag it to the desired width.
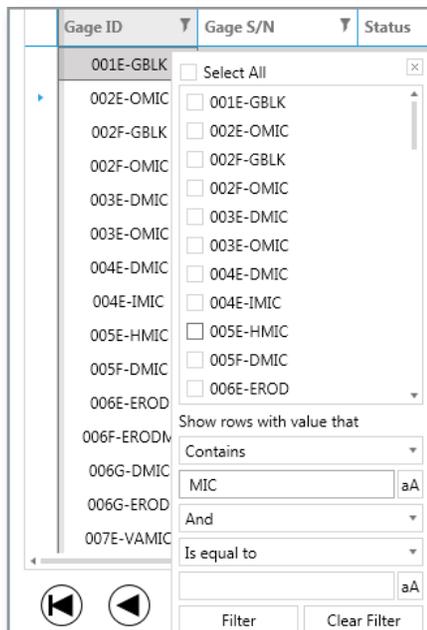
Sorting Records in Grid View

Each column header contains the name of the field that it represents. When you click a column header, you sort your records by that field.

Grouping Records in Grid View

In grid view, if you want to group your gages by type, for instance, you would click and drag the **Gage Type** column header up to the blue bar directly above it. You can expand the list by clicking the small arrow to the left of the type. To remove grouping, hover your mouse over the group; click the **X** that appears in the group's box.

Filtering Records in Grid View

Each column header contains a **Filter** icon ▼. Click that icon to see the filtering options. In the example below, gage records are filtered to show every gage whose **Gage ID** contains MIC (filtering for micrometers). After entering your filter criteria, click the **Filter** button. When no filter is active, the filter icon in that column is gray; when a filter is active, the filter icon is blue. To remove a filter, click the blue filter icon and then click **Clear Filter**. Click the **X** in the upper right corner of the filter window to close it.

After filtering records, you can save your filter criteria for future quick access. Simply click the **Save View** icon ⊞, enter a name for your filter and then click **OK**. To use that filter later, select it from the **Load View** drop-down list:

Load View | micrometers | ▼ | ✕

To delete a previously saved view, select the view and click the red **X**; confirm the deletion.

Exporting Records from Grid View

To export records from Grid View, click the **Export** icon ⊞, select an export format, browse to a destination location, enter a name for your file and click **OK**.

Pop-Up Calendar for Date Fields

You can enter dates by choosing them from a pop-up calendar instead of manually typing them. Whenever you're entering information in a filter or data entry screen that contains a date field, click the **Calendar** icon 🗓 in that field to open the calendar.

If the date field is blank when the calendar is opened, then the date highlighted on the calendar will be the current date. If there is a date in the field, the calendar will show that date in gray and today's date in blue. Click the left or right arrow in the calendar header to scroll to the desired month and year and then click a day to select it. The selected date will populate the date field.

Drop-down Lists

Drop-down list arrows indicate that a field contains a list of values. When you click the arrow, it presents the list in a scrollable box. Click an item in the list to select it. There are two types of drop-down lists: self-building lists and value lists.

A self-building drop-down list allows you to manually enter a new value which is automatically added to the list for future selection, for instance, the **Type** field in **Gages**. These fields also support auto-fill.

A value list contains data that is entered only via the main data entry point, for example, the **Status** drop-down list in the **Gages -> Information** tab. Values for this field can only be entered within the **Settings -> Calibration** tab. The new status value would then be available in the **Status** drop-down list within **Gages**.

Chapter Three: Settings

Before you begin entering records, we recommend that you first configure GAGEtrak Lite. From the main menu, select **Settings**.

Settings – Information Tab

Enter your company's information in this form.

| Field/Button	Description
Certificate of Calibration Statement	This statement is included in the Certificate of Calibration document. This field extends as you type to allow for longer statements.
Failure Notice Statement	This statement is included in the Calibration Failure Notice document. This field extends as you type to allow for longer statements.

To insert your logo, use the **Insert Object** or **Paste Logo** buttons. Ideally, your logo will be 200 pixels wide x 84 pixels high.

If you already have a logo file (.jpg, .png or .gif) click **Insert Object** and then browse to and select the file; the graphic will be displayed in the **Logo** field. If you do not have a logo file, but your logo is displayed in another document for instance, you can use a screen capture program to capture the graphic and then copy it to the Windows clipboard. In GAGEtrak Lite, you would then click the **Paste Logo** button and the graphic will be displayed in the **Logo** field. Click **Save** in the Ribbon. Your logo will be shown on reports.

Settings – Calibration Tab

The **Due List** pane at the top of this form contains the following fields:

Field/Button	Description
Time Range Fields	If you enter 30 days, for instance, then gages with due dates from now until 30 days from now will be shown as due. Gages with due dates outside of 30 days will not show as due.
Include gages…	Include past due gages in calibration due reports.
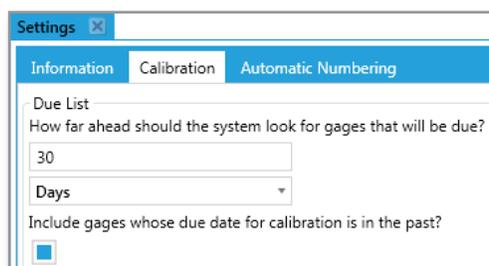
Skip Days and Skip Dates

GAGEtrak Lite lets you define dates that you want skipped when it calculates calibration due dates. These days, called skip dates or skip days, might include holidays, vacation periods or plant shutdown periods. To skip days of the week (like weekends), check the box next to each day of the week you want to skip.

To skip specific dates, enter those dates as either single dates or as a range. Enter as many skip dates as necessary. To delete a skip date, simply highlight and delete the contents of the field.

If a calculated calibration due date falls on a skip day or date, GAGEtrak Lite schedules it on the following working day or the previous working day, depending on the **Skip Direction** setting for each gage. Here in the **Calibration** tab, you set the **Default Skip Date Direction** which is used for any gage that does not have an individual skip direction applied.

Changes made to skip days and dates will not automatically change any existing due dates. Only due dates calculated after the changes are made will have the skip days and dates taken into account. Recalculate any existing due dates to use the new skip day or skip date settings.

If you manually enter a calibration due date, GAGEtrak Lite won't apply your skip dates to it.
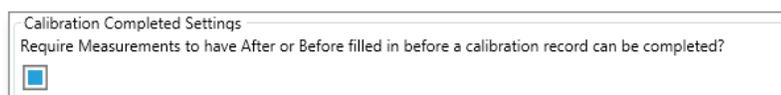
Date Formats

GAGEtrak Lite supports all of the available numeric date formats within Windows. For example, you can represent the date of November 1, 2018 as 11/1/18, 11/01/18, 11/1/2018, 18/11/1, 18/1/11, or 2018/11/1. Because GAGEtrak's reports use only numeric dates, you can select only numeric date formats. Therefore, you can't use dates like "November 1, 2018."

As a precaution, you may want to verify your date settings in Windows Control Panel. Click the Windows Start button and navigate to **Control Panel -> Region and Language Options**. The date formats that you enter into GAGEtrak Lite must match the Windows date setting; otherwise, errors will occur while you're running the program.

Calibration Completed Settings

Check this box to require this information:

Gage Status

At the bottom of the **Calibration** form are gage status settings. The values shown here appear in the **Status** drop-down list in **Gages.** Any status whose corresponding checkbox is checked will be shown as due for calibration. For a status like Lost, for instance, the gage will not be shown as due, since its due date would be moot.

The default statuses are Active, In-Active, Out for Repair, In Calibration, Lost, Employee Owned and Retired. You can change these descriptions or add additional ones as required by your company; for example, you may need to add Sealed or Loaned Out. If you would like to move a status up or down in the list, click the status to activate it and then click **Move Up** or **Move Down**.

Settings – Automatic Numbering Tab

GAGEtrak Lite can automatically generate a number sequence for your Calibration Certificates and Gage IDs. Use this form to set the desired format or leave the format fields blank for standard, incremental numbering. After deciding on a format, be sure to enable the automatic numbering by checking the corresponding checkbox.

Use a question mark (?) for incremental letters and the pound sign (#) for incremental digits. For letters or numbers that will not be incremental, enter the text as you want it to appear in the automatically generated number. These letters must all be capitalized. If you want to include date information in the automatic number, use the following date codes in your format:

dd = numeric day of the month (01 to 31)   ddd = text day of the week (Sun to Sat)

mm = numeric month (01 to 12)   mmm = text month (Jan to Dec)

yy = two-digit year (16)   yyyy = four-digit year (2016)

Chapter Four: Dashboard

Select **Dashboard** from the navigation menu. The GAGEtrak Lite dashboard organizes and presents information in an easy-to-read format and allows for interactive record navigation. The **Current Range** shown at the top left of the dashboard is dictated in the **Settings -> Calibration tab -> Due List pane**.

In the lower portion of the Dashboard is a list of all calibrations past due (shown in red) and due in the near future (shown in black). Click any column header to sort the data by that field. To create a calibration record directly from this list, click the checkbox associated with the gage (or select multiple gages this way) and either click the **New Record** icon in the record navigation bar or use the record's right-click menu and select **Create Calibrations for Selected Gages**. You can also view the gage's open calibration records from the right-click menu:

Chapter Five: Gages

To begin entering your gage records, select **Gages** from the main navigation menu.

Gages – Information Tab

To create a new gage record, click the **New Record** icon ⊕ in the record navigation bar. Use your mouse or tab key to move between the available fields in the gage form.

Below are brief descriptions of the major fields in this screen, for comprehensive explanation of Gages, refer to the Gages section of the Help System.

Field/Button	Description
Gage ID	When creating a gage record, you must enter a unique alphanumeric identification code for each gage in this field (in the **Create New Gage** window). For consistency and efficiency, you'll need to develop your own ID numbering system. Avoid using special characters in your IDs or other fields, such as quotation marks or ampersands. See the **Settings -> Automatic Numbering tab** section for information about automatic numbering for gages. To select a particular gage record for viewing or editing, select a **Gage ID** from the drop-down list of existing gages.
Due / Next Due / Past Due	To the right of the **Gage ID** field is a date field, the name and color of which change depending on the gage's calibration status. Upon creating a gage record, this field remains empty until the **Calibration Schedule** tab is complete. If the gage's **Status** is not set to show as due, this field will not be displayed, as its calibration status would be moot. See the **Settings -> Calibration tab** section for how to set a status to show as due.
Status	Use the drop-down list to select a status. This field is required. To add more choices to the **Status** field, see the **Settings -> Calibration tab** section.
Ref. Standard	Check this checkbox to indicate that the record is for a calibration reference standard (such as a gage block or reference weight), not a gage.
NIST No.	For reference standards only, enter the number that NIST (National Institute of Standards and Technology) provides for traceability purposes. If it's not marked on the reference standard, ask your supplier for the number.

Cloning a Gage

If you want to copy a particular gage record, including its set of calibration test points and procedures, click the **Clone Gage** button (located at the bottom of the **Gages** window). The **Clone Gage** window will appear. Enter a new **Gage ID** (or if you are cloning a gage in a series and want to name the new gage similarly, select an existing **Gage ID** from the drop-down list and then modify it to be a unique value). Click **OK**. The new gage record will be displayed, allowing you to enter the gage's unique information.

Renaming a Gage

To change the **Gage ID** of a particular gage, click the **Rename Gage** button and then follow the on-screen instructions. When finished, click **OK** and then click **Yes** in the ensuing confirmation message.

Gages – Calibration Schedule Tab

In this screen, you'll set up the calibration schedule for each gage. Below are brief descriptions of the major fields in this screen, for comprehensive explanation, refer to the Gages section of the Help System.

Field/Button	Description
Last Cal Date	When you first enter the gage record, enter the gage's last calibration date. Later, the program will automatically update this field whenever you add a new calibration record for the gage.
Next Due Date	This field shows the next calibration due date. It's automatically updated whenever you add a new calibration record for the gage (Next Due Date = Last Cal Date + Freq). You can also manually enter any date into this field. If the current date is past the next due date, you'll see **Past Due** below this field.
Next Calibration Date	To calculate the next due date immediately after you've entered a calibration frequency and last calibration date, click the **Next Calibration Date** button. This allows you to calculate the next due date even if you don't enter a calibration record for the gage.
Calibration Frequency and Calibration Frequency UOM	Enter how often the gage should be calibrated such as 45 DAYS. When the program calculates the next calibration due date, it uses this value.
	In the **Calibration Frequency** field, enter a numeric value. In the **Calibration Frequency UOM** field, use the drop-down list to choose the calibration schedule type:
	Days – the most common units; schedule is based on elapsed calendar days.
	Weeks – each week equals seven days; schedule is based on elapsed calendar weeks.
	Months – this option bases the schedule on months.
	Years – each year equals 365 days; schedule is based on elapsed calendar years.
	DOM (Day of Month) – this frequency unit allows you to set a day of the month on which the calibration will typically be due. Set the calibration frequency to the number of months from the date of the last calibration. When you set the frequency unit to DOM, an unlabeled field will appear, allowing you to enter the desired day of the month. For example, if you want the calibration to be due on the 10th of the month, six months from the time it was last calibrated, you would set the calibration frequency to 6, the unit of measure to DOM and the day to 10. DOM uses the skip dates and skip days features, so the gage may not always be due exactly on the day set. If you enter a day that is not in every month, such as 31, then the application will use the last day of the month for months with fewer than 31 days.
	EOM (End of Month) – The next due date will be the last day of the appropriate month, based on the frequency unit. For example, 6 EOM means every 6 months, but the program extends the Next Due Date to the end of the sixth month. If you're using skip dates, the program schedules the Next Due Date on the last working day of the month.
Skip Date Direction	If the calibration date falls on a skip date, this determines whether to move the calibration date forward or backward. Select the **Default Skip Date Direction** within the **Settings -> Calibration** tab. Each gage, however can have its own skip direction setting which would override the default setting.

Gages – Procedures Tab

Procedure records must first be entered within **Procedures** and then will be available to link to a gage in this screen. Click the **New Record** icon ⊕ (under the **Procedure Name** field) and then select a procedure from the **Procedure Name** drop-down list; the **Procedure Text** will auto-fill. The text is not editable in this screen - only in the **Procedures** data entry area. Once a procedure has been used in a calibration, however, even the main procedure record cannot be altered.

Under the **Procedure Name** field is a record navigation bar that pertains to this subset of records (procedures). To add another procedure to the gage, you would click the **New Record** icon in this bar and then select another procedure.

CalPro Calibration Procedures

To help save time when you're entering procedures, CyberMetrics offers an invaluable product called CalPro. CalPro is a database of complete step-by-step calibration procedures, covering everything from gage blocks to micrometers and calipers. CalPro procedures are industry-proven, editable procedures that you can use in your GAGEtrak Lite database or use separately for inclusion in your company's quality manual. For information about purchasing CalPro, please contact CyberMetrics at 1-800-777-7020 or sales@cybermetrics.com or contact your distributor.

Chapter Six: Calibrations

To enter calibration records, select **Calibrations** from the main navigation menu.

Calibrations – Information Tab

When you first open this screen, GAGEtrak Lite displays the most recent calibration record. If you filter for a group of gages, the most recent record for the first gage in the group will appear.

To create a new calibration record, click the **New Record** icon ⊕ and then select the desired gage from the **Gage** list (or select multiple gages to batch create calibration records). GAGEtrak Lite automatically displays the date on which this gage was last calibrated and retrieves the test points for this gage.
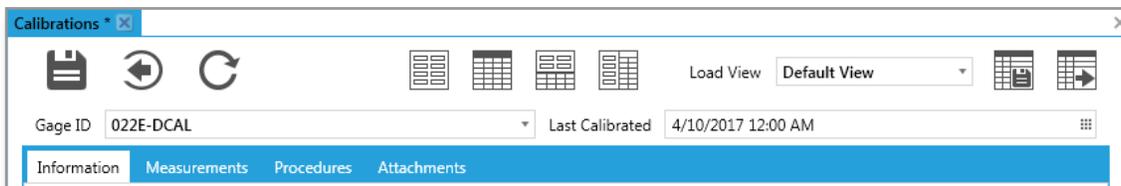
Calibrations – Measurements Tab

GAGEtrak Lite supports multiple reference standards on each test point, so that measurements that utilize a combination of master standards can be accurately documented, and also supports multiple tolerances within a single calibration. This permits accurate tolerance recordings for gages or instruments that support multiple plus and minus tolerances.

You can use this screen to compare the actual before and after measurements of the gage with the standards that you use to calibrate the gage.

Field/Button	Description
Test Point Name	GAGEtrak Lite copies the **Test Point Names** from the gage record.
Test Point Record Navigation Bar	Under the **Test Point Name** field is a record navigation bar that pertains to this subset of records (test points). In the screenshot above, for example, the bar shows that there are 13 test points for this gage.
Test Point Type	Two types of calibration standards available: Variable 'V' or Attribute 'A'. Select Variable for those standards that have a value that you actually measure (such as 0.502 inches). Select Attribute for pass/fail or visual types of checks. Selecting Attribute does not calculate accuracy of particular standard. The program auto-fills it from the gage record, if entered, or you can select it here.
Units	The program auto-fills the units of measurement from the gage record.
Decimals	This field auto-fills from the gage record, but can be changed here.
Plus and Minus Tolerance	The program auto-fills these values from the gage record.
Minimum, Nominal and Maximum	The program auto-fills these values from the gage record.
Before	Enter the actual measurement observed before you adjust the gage.

After	Enter the actual measurement observed after you adjust the gage.
Limited Use	Based on the gage's accuracy compared to its calibration standard, use this box to restrict the gage to limited use, meaning that it shouldn't be used for measurement of this particular range.
Lower portion of the form: Standard, Gage S/N, Next Due Date and NIST No.	This grid stores information about the reference standard(s), which is important for traceability back to a specific standard. Select from a list of available standards by clicking the **Link Reference Standards** button. The list only includes gages that have an X in the **Ref. Standard** checkbox within the **Gages -> Information** tab. A gage cannot be selected if it is past due for calibration.

Calibrations – Procedures Tab

In this screen, you can see any calibration procedures that are attached to the gage record; procedures are read-only in this area. If you click the **View** button, the procedure will open in an external text editing program, such as Microsoft Word. To edit procedure records within GAGEtrak Lite, go to **Procedures** from the main menu.

Conclusion

We know you will enjoy using your new GAGEtrak Lite software and we are confident that you will experience increased productivity with this easy-to-use product. In addition to this guide, we have included a comprehensive Help System and we have a team of experienced support representatives on hand to assist you in your implementation of this product. If, however, you would prefer a more comprehensive introduction, please contact us regarding our various training solutions.