GAGEtrak®

The World's #1 Calibration Management Software Solution

Getting Started Guide

CyberMetrics®

GAGEtrak®

Calibration Management Software

Getting Started Guide

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Chapter One
Introduction

Overview

Welcome to GAGEtrak®, the world's #1 calibration management software solution. GAGEtrak is a database software program that automates your calibration information, saving you time and giving you precise control over the tools you use to do your job. The program was designed for quality control professionals who need a convenient, easy-to-use and powerful method for documenting, tracking and retrieving calibration information. Once you've mastered its essentials, GAGEtrak will become a vital tool for managing your calibration records.

The GAGEtrak installer on your product CD will automatically install a copy of the User Guide onto your hard drive; you can also choose to have the installer place an icon on your desktop. The User Guide gives you detailed information about working with records and reports, provides comprehensive installation instructions (including client/server installations) and instructions for setting up and maintaining the program and database. The file will open with Adobe Acrobat Reader which must be installed on your computer and can be downloaded free from www.adobe.com.

This guide briefly discusses the development of formal measurement testing and calibration. Then, we'll look at a hypothetical example of how you could use GAGEtrak on a typical day. This example will familiarize you with the program's major functions and features while giving you a look at some optional accessories.

This guide also provides an introduction, teaching you how to quickly install and use three of GAGEtrak's major functions - **Gage Entry, Calibration Entry** and **Gage Issue and Return**.

Measurement and Calibration

Throughout history, measurement has been a tricky process. Before our modern measurement systems were developed, people didn't have standard measurements to use in their daily lives. For example, if you told the local woodcutter that you needed a "foot" of wood, you would get just that - a foot by his definition, not your definition. If his feet were longer than yours, you benefited; if not, you were left short.

Gradually, people began to realize that this method of measurement simply would not do. They developed standards of measurement - ultimately, national standards. However, with the advent of the global marketplace, it became apparent that we needed global standards to ensure part interchangeability between countries.

In developing these standards, we were trying to ensure accuracy and precision in our measurements. Accuracy is how close a measurement instrument comes to an established standard; precision is how consistent that instrument is when measuring the same item several times. Therefore, we calibrate our instruments to adjust them to the proper standard.

This is where GAGEtrak comes in. Every day, you have to test and calibrate gages to ensure their accuracy and precision. In order to ensure quality and provide for a ready analysis of a single gage's performance over time, you have to document each calibration that you perform on that gage. Now, you could do this on paper, but then you'd have stacks of paperwork to keep organized. This paperwork is easily lost and you often don't have backup copies for it. We developed GAGEtrak for this reason. By giving you a paperless, easy-to-use tracking system, GAGEtrak makes the job of managing your gages and test equipment easier and ensures that your calibration records are accurate and up to date.

Chapter Two
How Does GAGEtrak Work?

To answer this question, let's look at how your calibration lab might use GAGEtrak on a typical day. Please note that this story is merely hypothetical; it's not meant to be prescriptive. You'll notice that all of the program's **features** and **reports** are in **bold** print and all of the *optional accessories* are in *italic* print.

A Typical Day in the Calibration Laboratory

It's Monday morning, and it's time to plan the day. The QC manager asks you for the weekly **Calibration Schedule**. You anticipated this request and you've already printed it, so your first task of the day is finished almost effortlessly.

Next, you pour your coffee, turn on your computer and start up GAGEtrak to help you plan the rest of your day. Your **Automatic Calibration Due Listing** report pops up on the screen, showing all of the calibrations that are due today. You print it out to use as a handy reference so that you can be sure that all of the required work is finished today.

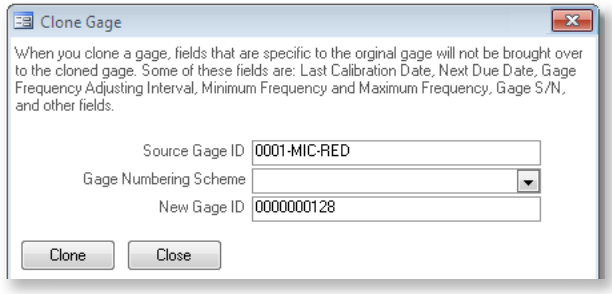
Now it's time to organize the work for your calibration crew. First, you assemble the reports that you printed last Friday. Because you have several calibration technicians and you have some gages that you must send off-site for calibration, you printed a separate **Calibration** report for each of these people or sites.

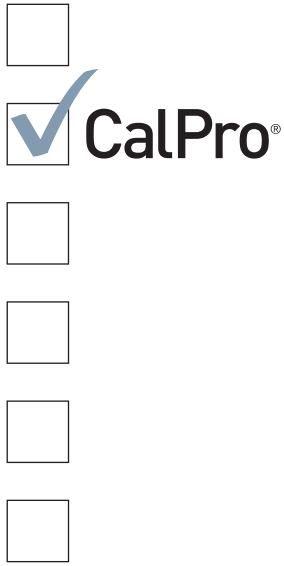
Along with each of these lists, you include the **Calibration Work Order** for each gage that needs to be calibrated. The **Calibration Work Order** includes a list of all of the **Calibration Standards** used, along with the minimum, nominal and maximum measurements for each standard. You've also been thorough enough to include the **Calibration Procedures** needed for each **Work Order**.

Now, you're ready to send your technicians off to work. One of them is going to a remote site and he'll be gone for several days, so you download his calibration information to his *PCM (Portable Calibration Module)*. He'll be able to record all of the calibration results into the *PCM* and when he returns on Thursday, you'll upload the information he recorded and update the calibration records in your GAGEtrak database.

The PCM can be purchased separately or as part of GAGEtrak's Portable Calibration Solution which also includes one of two portable printers and a Netbook.

Later in the morning, you finally receive the new gages that you ordered last week. Since you already have a gage of the same type as one of these new gages, you use the **Clone Gage** feature to copy the common information about this gage into a new gage record. When you clone the gage, GAGEtrak copies all of the calibration standards, parts and procedures to the clone. All you have to do is enter the gage's unique information, like its serial number, purchase date and next calibration date.



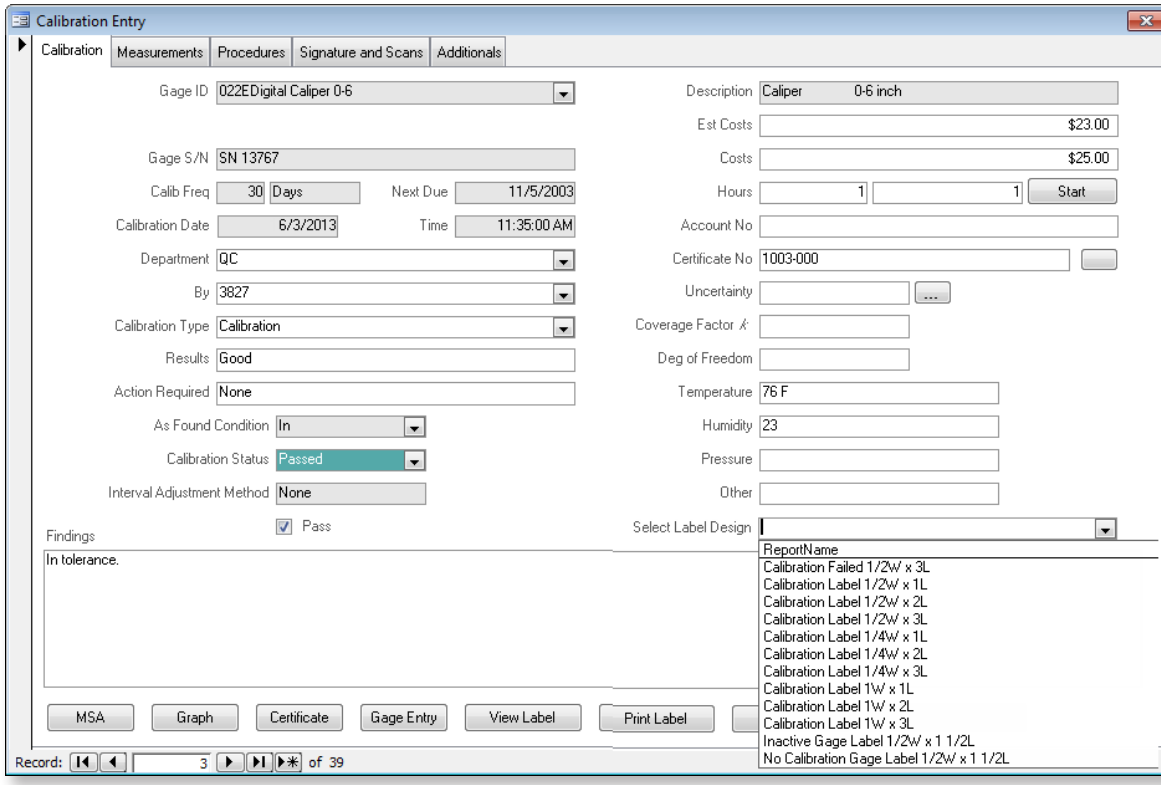


After you clone the first gage, it's time to enter a record for a completely different type of gage. You enter all of the specifications for the gage and you're ready to enter its calibration standards. Because you will electronically check this gage at incremental intervals during calibration, you use GAGEtrak's **Calibration Standards Prefill** feature to automatically create the eight calibration checkpoints required.

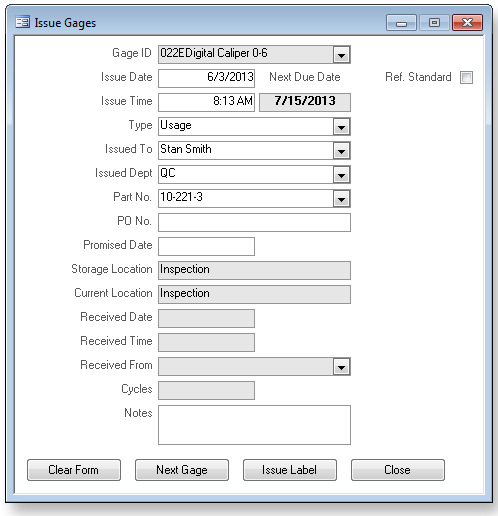
You'll need a new procedure for calibrating, too. You use *CalPro*®, a database of step-by-step calibration procedures that covers everything from gage blocks to micrometers and calipers. Thanks to *CalPro*, you don't have to waste time researching or creating calibration procedures. You can simply import the procedures directly into GAGEtrak. Using *CalPro* also helps your company comply with ISO 9001:2008 and ISO/IEC 17025 quality standards.

After lunch, you spend the afternoon calibrating some gages yourself. One of the gages you calibrate is the new electronic gage you received this morning. The output from this gage is transmitted through one of the serial ports on your PC. You're using the *Software Wedge* program to capture this real-time data and automatically insert the gage's measurements into GAGEtrak's **Calibration Measurements** screen.

Once you've finished, you use the *GAGEtrak Calibration Label Kit* to print out a calibration label for each gage. These laminated, durable labels are oil- and water-resistant and they're easy to print and apply to your gages.



Now one of your lab technicians tells you that another department needs to borrow a gage and asks if he can just give it to them. Your reply: "No, we need to provide traceability each time someone uses our gages." You ask him for the **Gage ID** and use **Issue Gages** to loan out the gage so that you have an accurate location for it. You might never have found this gage again if it had gone off to the other department unchecked. You've also ensured that you'll have traceability for this gage.



Later in the afternoon, you check on the tool crib. Some gages used for manufacturing today are being returned. An employee with a *Bar Code Reader* is quickly scanning the bar-coded labels on each gage.
A second scan across bar-coded department identification completes the gage return information.

Because you expect your auditor to arrive tomorrow, you print the **Calibration History with Measurements** report for the last three months, for all of your gages. You also print the **Standards Traceability** report, which shows all of the reference standards associated with your calibration standards for every calibration. Now you have documented proof as to exactly which instrument or standard you used to calibrate each gage. If your auditor asks for more information about your reference standards, you can quickly generate reports showing each one's NIST number, uncertainty, calibration schedule, calibration history, calibration certificate numbers and even the exact calibration measurements, since you've entered this much detail into your GAGEtrak records.

It's time to go home now, and you're ready to go. As you leave, you try to remember what your workday was like before you had GAGEtrak. How did you ever manage?

Benefits

As you can see, using GAGEtrak and its accessories saved you a lot of time, effort and stress. Let's list these benefits by the program features they used:

1. You easily and quickly generated an accurate Calibration Schedule.
2. You also easily generated an Automatic Calibration Due Listing report that told you what you had to do for the day. Plus, you were able to give your technicians the Calibration Work Orders and Calibration Procedures that they needed for their assigned calibrations.
3. The PCM gave the technician who was going off-site a faster, less cumbersome way of recording his calibration information. Later, you will easily be able to upload this information into your database.
4. The Clone Gage feature also saved you time. Without it, entering the new gage's information would have taken much longer, not to mention that it would have been a redundant task. This feature also provided for more accurate data entry, since you didn't have to worry about as many potential errors.
5. The Software Wedge program instantly inserted your calibration measurements into GAGEtrak; you didn't have to enter anything.
6. CalPro gave you proven calibration procedures that were already researched and documented.
7. The Calibration Label Kit helped you speedily print durable, easy-to-read calibration labels for each gage that you calibrated.
8. Using Issue Tracking, you were able to quickly issue a gage out to another department and avoid the problem of not knowing where the gage is located. Most importantly, you now have an easy way to provide traceable gage usage history for each of your gages.
9. The Bar Code Reader provided for fast, easy and accurate entry of issued and returned gages and even updated their current information directly into GAGEtrak.
10. Thanks to GAGEtrak's large variety of detailed reports, you can rest assured that you'll be able to quickly and accurately retrieve any calibration information that your auditor asks to see.
11. Finally, GAGEtrak's features and optional accessories helped you with one extremely important task - ensuring your company's compliance with ISO 9001:2008 and ISO/IEC 17025.

Chapter Three
Installing & Launching GAGEtrak

Now that you've seen how GAGEtrak works, it's time to install your software. The following instructions will tell you how to install and run the software quickly, allowing you to evaluate its major functions. For more detailed information, please consult your User Guide, which is located on your product CD.

Program Requirements

Workstation Requirements

- Windows 2000, XP, Vista or 7 (32 Bit or 64 Bit)
- Hard disk with 150 MB of free space for program files and 100-200 MB of free space for a typical database
- 1 GB RAM required; 2-4 GB recommended
- Pentium 1.4 MHz CPU required; 2.8 GHz or higher recommended
- Display monitor with 1024 x 768 or higher resolution
- Mouse or compatible pointing device
- Ink-jet or laser printer for printing reports

Network Requirements

Optional: This section applies only if the data file will be shared over the network or will be part of a regular network backup.

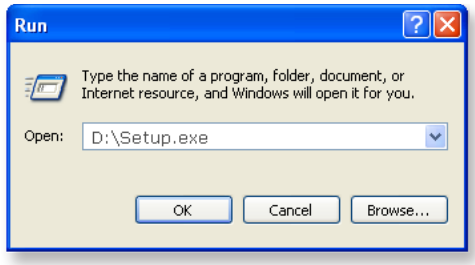
- Network folder with full rights for each GAGEtrak user
- Local Area Network at 100 Mbit or higher speed

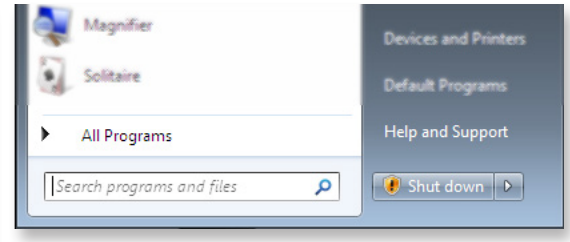
Installing GAGEtrak

The User Guide contains detailed information about different ways to install GAGEtrak and set it up on a network, including how to set it up in a client/server environment. However, if you'll just be using the program on one PC and installing it from the CD-ROM, follow these instructions:

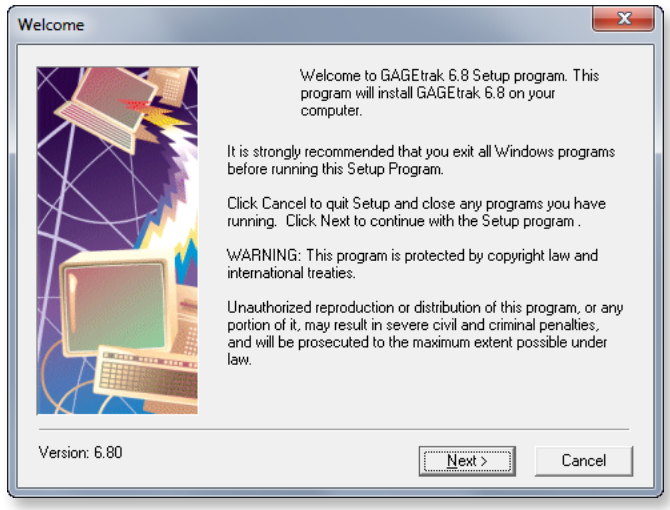
1. Click the Windows **Start** button and select the **Run** or **Search...** command.

2. Place the GAGEtrak CD into your CD-ROM drive [D], (the drive may vary depending on your system setup) and enter **D:\SETUP.EXE** in the **Open** field of the **Run** window or in the **Search programs and files** field in Windows 7.





3. Follow the GAGEtrak installation instructions on your screen.

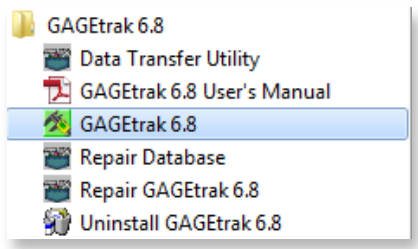


Launching GAGEtrak

1. Double click the GAGEtrak icon that was placed on the desktop during installation.

   OR

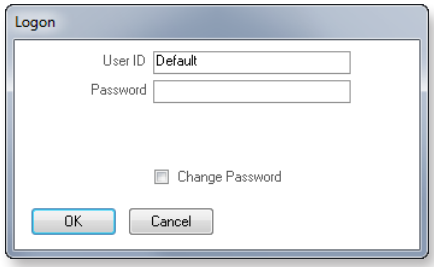
   Click the Windows Start button, click All Programs, click the GAGEtrak 6.8 program group to expand it and then click GAGEtrak 6.8.



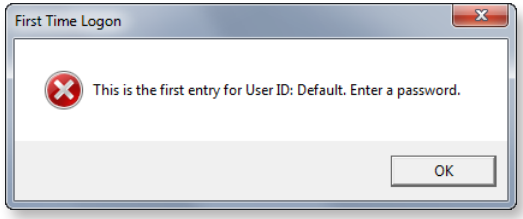
Logon

GAGEtrak requires users to log in if you have installed the Standard application and activated security through **Settings -> Security** or if you have chosen to install the 21 CFR Part 11 Compliant Application (in which case security is automatically activated). The **Logon** window shown below will appear. Enter your User ID and Password in the appropriate fields and then click **OK** to log in.

Note: The 21 CFR Part 11 Compliant version of GAGEtrak automatically activates security. Therefore, when GAGEtrak is launched for the first time, you must log in. Since your users and groups have not been setup, a logon User ID of "Default" is provided so you can log in. Once you have logged in, set up your users and groups first, then delete the User ID Default. Also, the User ID is case insensitive whereas the password is case sensitive.

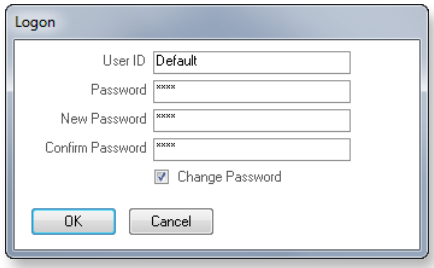


The first time you log into GAGEtrak, you will see this message:



Click **OK**. Enter a new password in the **New Password** and **Confirm Password** fields and click **OK**. GAGEtrak will require you to enter this password the next time you log in.

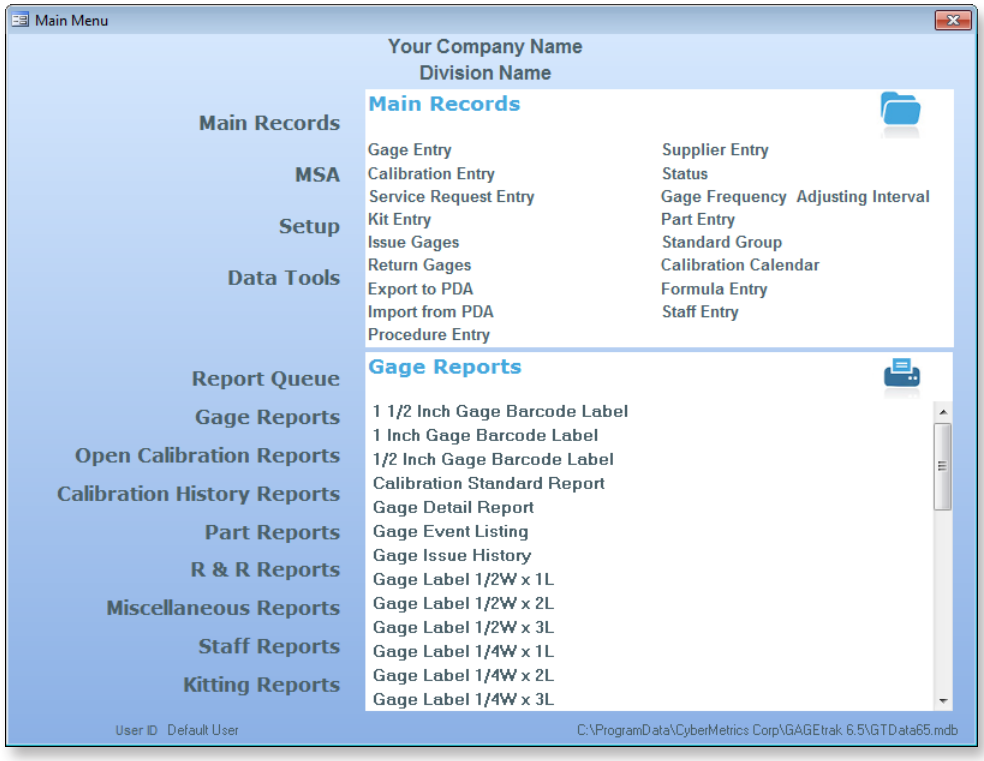
When you want to change your password, click the **Change Password** checkbox in the **Logon** window. You will need to enter your old password and then enter and confirm your new password.



Main Menu

Upon successful login, the GAGEtrak main menu is displayed. The name of the currently logged in user is displayed in the lower left corner; the full path to the attached database file is displayed in the lower right corner.

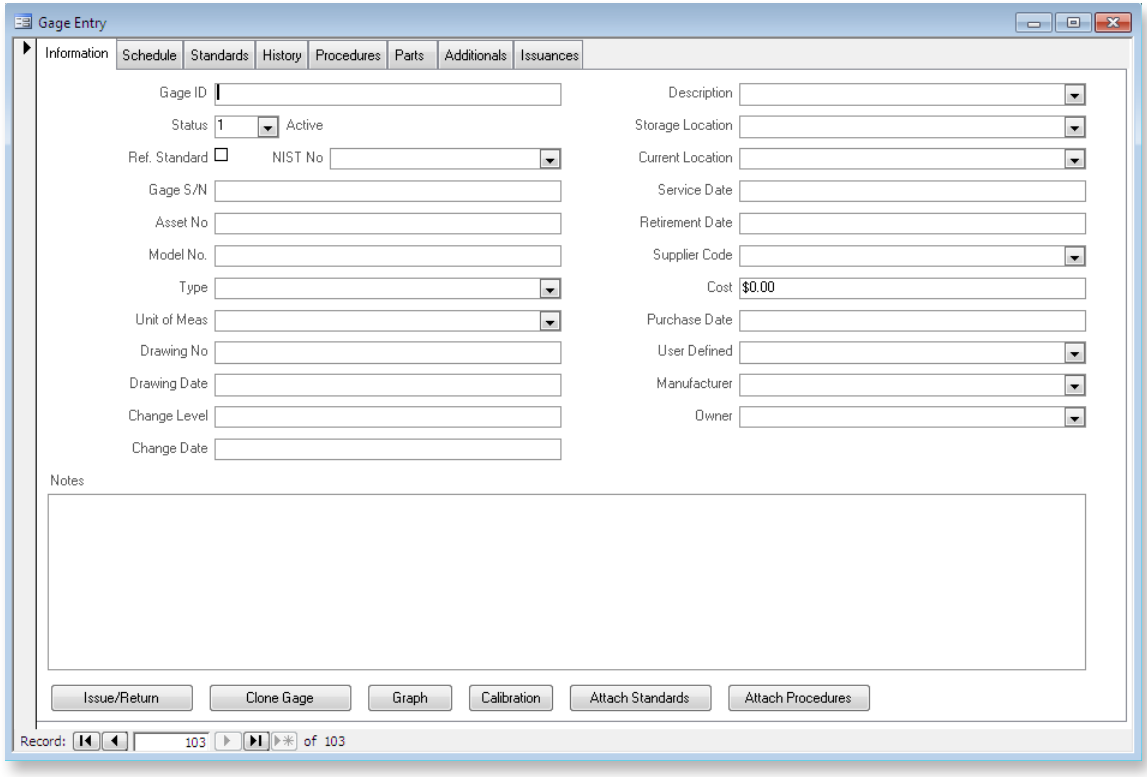
Select a menu group on the left and different action items will appear to the right from which to choose. This menu system puts every GAGEtrak feature right at your fingertips without excessive navigation requirements.



For a complete list of menu options, consult your User Guide.

Chapter Four
Entering Gage Records

To begin entering your gage records, select **Gage Entry** from the **Main Records** menu.

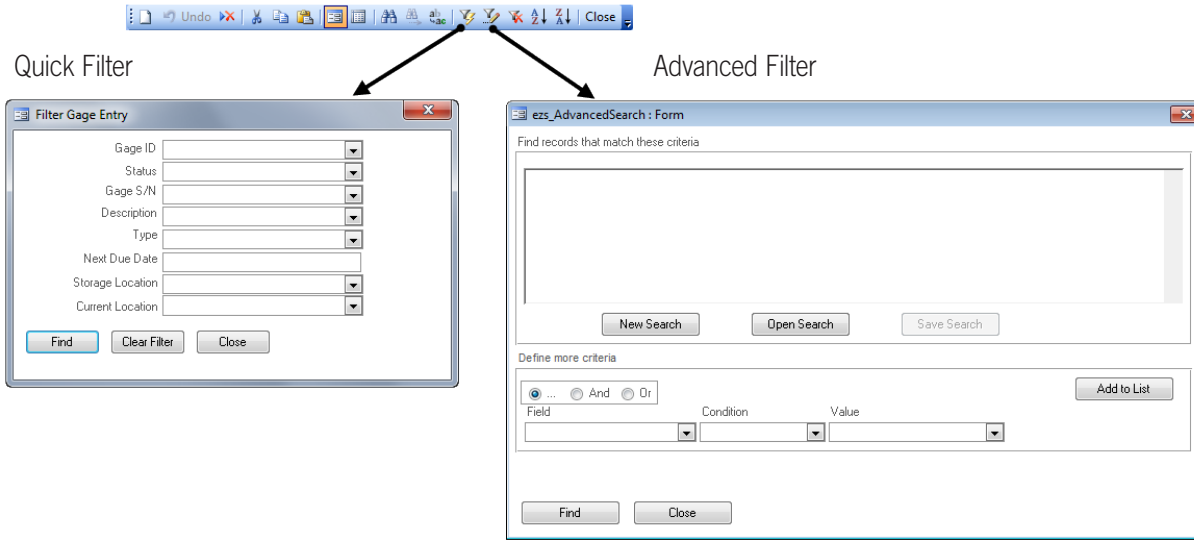


Since you haven't entered any gage records yet, the fields are blank.

To enter a new gage record, click the **New Record** button on the toolbar or the **New Record** button in the record navigation bar (lower left corner of the window) and then fill in the gage record with your data. Following are brief descriptions of the major fields in this screen; for comprehensive explanations of Gage Entry functionality, refer to the **Gage Entry** section of the User Guide.

Field Name	Description
Gage ID	Enter a unique alphanumeric gage identification code; you must enter this ID in order to store the record. If you don't have a gage ID numbering system, you can take this opportunity to create one. Tip: Avoid using the characters #, *, ! and ? in the Gage ID or other fields, as these are wildcard characters in GAGEtrak. For more information about wildcards, see the Program Conventions section of the User Guide.
Status	Use the list box to pick from available choices (such as Active or In-Active). This field is required. Tip: If the Status field is not set to Active, the Calibration Due reports will skip over the gage.
Ref. Standard	Check this box to indicate that this record is for a calibration reference standard, not a gage (use it to identify gage blocks or reference weights).
NIST No.	If this record is for a reference standard, enter its NIST number here.

After you enter your gage records, you can use the Quick or Advanced Filters to narrow your record searches. Click the **Find** button to go to the gage record window.



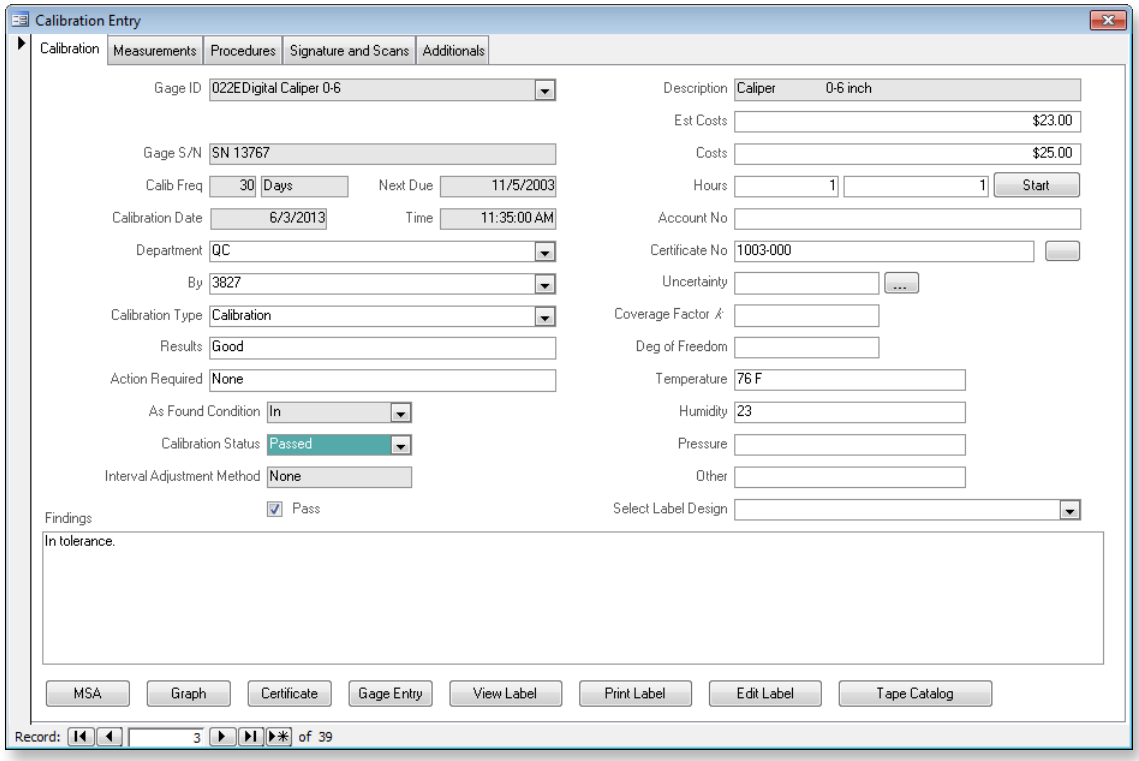
Chapter Five
Entering Calibration Records

To enter calibration records, select **Calibration Entry** from the **Main Records** menu.

To create a new calibration record, click the **New Record** button on the toolbar or the **New Record** button in the record navigation bar (lower left corner of the window) and then select the desired gage from the **Gage ID** drop-down list near the top of the window.

After you save the record by entering information into this screen (such as your department), GAGEtrak automatically retrieves any standards you set up for the gage.

See the User Guide for a detailed description of Calibration Entry.


Calibration Entry
Calibration
Measurements
Procedures
Signature and Scans
Additionals
Gage ID
022EDigital Caliper 0-6
Description
Caliper 0-6 inch
Est Costs
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Gage S/N
SN 13767
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Department
QC
Certificate No
1003-000
By
3827
Uncertainty
Calibration Type
Calibration
Coverage Factor k
Results
Good
Deg of Freedom
Action Required
None
Temperature
76 F
As Found Condition
In
Humidity
23
Calibration Status
Passed
Pressure
Interval Adjustment Method
None
Other
Pass
Select Label Design
Findings
In tolerance.
MSA
Graph
Certificate
Gage Entry
View Label
Print Label
Edit Label
Tape Catalog
Record:
3
of 39

Chapter Six
Issuing and Returning Gages

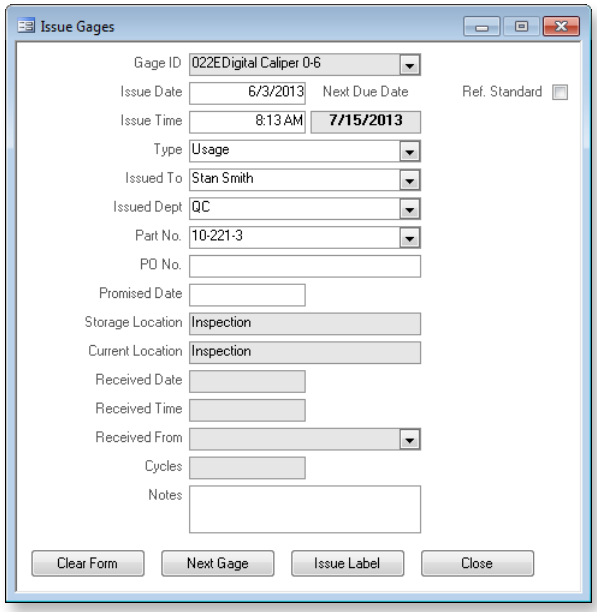
Use **Issue Gages** and **Return Gages** to track every issuance, return, calibration and repair of a gage. This is particularly useful in a gage crib, where gages and inspection equipment are checked out and then returned for storage. By tracking this information, you'll identify which gages your company uses the most and who uses those gages. You'll also be able to locate any gage. Another purpose of these records is to track gage usage times and cycles if you base the gage's calibration schedule on days used or cycles. If you consistently use the **Part No.** field, you can create manufacturing traceability. For example, if you find that a gage is out of tolerance, you can immediately generate a part recall report listing all parts that may have been incorrectly measured.

Note: You can also issue or return gages, one at a time, via Gage Entry's Issue/Return button; however, Issue Gages and Return Gages are designed for consecutive gage issues/returns and to facilitate bar-coded data entry. Both screens operate in the same way.

To issue or return gages, go to the **Main Records** menu and click on **Issue Gages** or **Return Gages**.

Issue Gages

When you click **Issue Gages**, this screen appears:

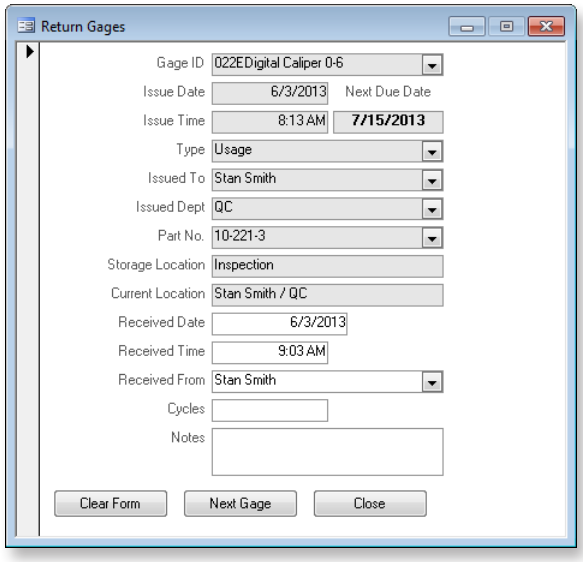


The **Issue Gages** fields are as follows:

Field Name	Description
Gage ID	This drop-down list contains all gages available for issuance.
Issue Date and Issue Time	These fields track the date and time on which you checked out the gage and are auto-filled with the current date and time. These values can be overwritten.
Ref. Standard	If this box is checked, it means that the gage is a standard.
Type	Select the type of issue; this field creates its own list from your entries.
Issued To	Enter (or select from the drop-down list) the name of the person to whom the gage is being issued. Selection may be limited based on the gage being restricted in the Gage Entry -> Issuances Tab.
Issued Dept	Use this field to track the department or job number that will use the gage.
Part No.	Enter or select the number of the part the gage will measure.
PO No.	Purchase order number
Promised Date	Anticipated gage return date
Storage Location	This uneditable field shows where the gage is stored when not in use.
Current Location	This uneditable field shows where the gage is now.

Return Gages

When you click **Return Gages**, this screen appears:



The **Return Gages** fields are included on the lower half of the **Issue Gages** form and are as follows:

Field Name	Description
Received Date and Received Time	These fields track the date and time of the gage's return and are automatically pre-filled with the current date and time. These values are editable.
Received From	In this field, enter or select the name of the person who returned the gage.
Cycles	Enter the number of use cycles performed by the gage (usually 1). For gages that you calibrate according to cycles, GAGEtrak adds this number of cycles to any previous cycles that the gage performed, then it uses that number to calculate the next calibration due date.
Notes	Record any important comments in this field, such as damage or malfunctions.

Chapter Seven
Technical Support

We hope that you're more familiar with GAGEtrak now and that this introductory guide has helped you understand more about how GAGEtrak can help you organize and document your gage and calibration records. Please consult the User Guide for detailed instructions about other entry screens, reports, program setup options and other product features.

If you have any questions about or problems with your software, please contact CyberMetrics Technical Support at **1-800-777-7020** or **support@cybermetrics.com**.

Chapter Eight
Products and Services

Training

Learn how to save time, avoid common mistakes and get the most out of your software with these GAGEtrak training packages. Contact us today at **1-800-777-7020** or **sales@cybermetrics.com**.

Getting Started

This basic training package is a quick and easy way to begin using your GAGEtrak software. It includes two hours of personalized Web training and one seat in a GAGEtrak regional class of your choice.

Getting Started Plus

This extended training package includes two hours of personalized Web consultation (which can be used for additional training, implementation assistance or data import services*) and two seats in a GAGEtrak regional class of your choice.

Getting Started On-site

This all-inclusive training package ensures that you can take advantage of GAGEtrak's full potential right from the start. It includes four hours of personalized Web consultation (which can be used for additional training, implementation assistance or data import services*) and two days of on-site training at your facility and at your convenience.

*Excel single worksheet or MS Access. Some restrictions apply.

Other Professional Services

Whether GAGEtrak is your first calibration management software solution or you're upgrading to GAGEtrak from another application, our comprehensive suite of professional services will minimize your downtime and make the transition seamless.

Our team of in-house Client Solutions Managers will advise you on the ideal setup and use of our products for your company's unique infrastructure and get GAGEtrak up and running quickly so you can focus on what you do best.

- Consultation
- Data Import
- On-site Implementation
- On-site Validation

GAGEtrak Product Options

Validation Kit

The GAGEtrak Validation Kit helps you establish and document FDA validation of your GAGEtrak software. It includes a validation guide which serves as the basis by which the software is validated and a validation database to assist you with:

- Testing the software's functionality
- Preparing your SOPs for GAGEtrak
- Training the users of the software
- Documenting the formal validation report

GAGEtrak BEACON

GAGEtrak BEACON is an easy-to-use, flexible system that saves time and improves efficiency by ensuring that your technicians receive accurate calibration due email notices on time. After loading and configuring, no manual intervention is required. BEACON periodically polls your GAGEtrak database for calibrations that are due and efficiently sends out email notices to the calibration technicians. BEACON can be configured to send notices to specific technicians or departments that are responsible for certain gages.

GAGEtrak Total Calibration Solution (TCS)

TCS combines everything you need for ISO 9000 and ISO/TS 16949 calibration compliance at a package price.

- GAGEtrak Software
- Calibration Label Kit
- CalPro Calibration Procedures
- Maintenance Agreement (MA) which includes technical support for one year and free in-version updates

GAGEtrak SQL Server

The SQL Server version of GAGEtrak provides stability and efficiency for large, multi-user databases and greater data security. It works just like GAGEtrak single-user and network versions, but uses Microsoft SQL Server as a database engine.

GAGEtrak Portable Calibration Solution (PCS)

With GAGEtrak PCS, you'll be going places! PCS includes the Portable Calibration Module software, a portable label printer and a Dell Netbook computer. View calibration procedures and gage and calibration data, generate calibration-related reports, calibration certificates and failure notifications and even print durable labels in the field. If you outsource calibrations, your provider uses the module to update your calibration data, and when the gages come back, you can easily sync the data with your GAGEtrak database.

CalPro Calibration Procedures

An indispensable asset for any calibration department, CalPro is a database of step-by-step calibration procedures for more than sixty commonly used inspection gages, instruments and reference standards. Import CalPro procedures into GAGEtrak or print them from the DOC files included on the CalPro CD.

Calibration Label Kit

Create durable, laminated, bar-coded calibration labels directly out of GAGEtrak with this compact Brother® printer (PT-9700PC desktop or PT-9800PCN network). The harsh-environment labels are resistant to moisture, temperature extremes, industrial chemicals, UV and abrasion and are available in a variety of sizes and colors.

Issue & Return Module

With GAGEtrak's Issue & Return Module, you'll never lose track of your gages again. This simple, easy-to-use interface gives you quick access to GAGEtrak's Issue Gages, Return Gages and Kit Entry screens as well as the Reset Gage Issue Status utility. This module is a perfect solution for a gage or tool crib operator who does not need a full copy of GAGEtrak. Using Issue & Return allows you to track each instance of a gage being loaned out or sent out for calibration or repair and its return to the crib. By tracking this information, you will be able to locate any gage at any time and you can identify which gages are used most often and by whom.

GAGEtrak's Issue & Return Module is an easy, efficient way to track gage locations and most importantly, it enables you to provide a traceable gage usage history for every gage. Combine the module with the Calibration Label Kit and Bar Code Reader to improve efficiency even more.

CyberSensor

CyberSensor connects to your computer via a USB port and monitors the temperature and relative humidity of your calibration environment, making your calibration documentation even more complete. Just pass a calibration or double-click the Temperature or Humidity fields in GAGEtrak's calibration window to populate the fields with data from the CyberSensor.

Report Viewer

Report Viewer is an easy-to-use desktop utility that allows you to generate thorough, customized reports to analyze and stay ahead of trends, forecast workloads, improve efficiency and minimize costs.

Report Viewer connects to your GAGEtrak database allowing you to access all standard GAGEtrak reports as well as any edited or custom reports that were created within GAGEtrak; reports can be viewed on-screen, printed or emailed. You can also print durable, laminated labels from Report Viewer with the Calibration Label Kit.

If you have more than one database, Report Viewer lets you switch between them quickly and easily and because it utilizes the same security system that is built into GAGEtrak; only authorized staff and managers can access it.

Report Viewer offers the convenience and simplicity of accessing only the information you need, allowing you to have more control over your quality management program.