GAGETRAK VERSION 8

UPGRADE GUIDE

This information applies to all software editions and standalone products with this version number.

NEW FEATURES

- Modern user interface
- Ad-hoc reporting
- Configurable views, allowing users to save and share
- In-application reminders
- Customizable gage transfer rules
- Dedicated and manageable due listings
- Pre-definable gage record templates
- Multi-language support
- Flexible licensing (subscription or perpetual licenses with node-locked or concurrent seat options)

ENHANCED FEATURES AND CAPABILITIES

MS Office Version Independent: GAGEtrak 8 has no reliance on the MS Access runtime provided with Office. For your convenience, a low-footprint database will replace your MS Access database for easy network sharing (or you can migrate to Microsoft SQL or PostgreSQL for better stability and performance).

Dedicated Archive Manager: Records selected for archive in the new Archive Manager application are now removed from the core database and stored in a separate archive database. This capability will not only remove the clutter from your day-to-day navigation, it will also provide true database performance increases.

Dedicated Notification Manager: GAGEtrak 8 now provides much greater flexibility in scheduling and sending automated email content, including due listings and saved views.

New, Improved Custodian Management: Suppliers and staff have been consolidated into a new **Custodians** area. Now, you can more easily update, assign and manage your staff or suppliers and the gages linked to them. We have even added a new **Customer** record type, allowing users to track gages that are utilized by their customers.

Multi-level and Pre-definable Calibration Signature Options: Now users can sign calibration records using any number of signatures they require (no longer limited to just two signatures).

Dedicated Crib Manager: Provides options for single-step or two-step transfer actions (routing or transactional) and also includes integrated product-based and gage capability-based criteria for gage transfers. A **Quick Transfer** option is available in the **Crib** or in the **Gages** entry view, which allows for quick and easy gage transfer actions.

Calibration Formula Options: These options have been improved to allow users to pre-define formula conversions on individual test points, which can then be automatically applied to measurement results.

Additional Schedules: Additional schedules have been moved to the new Activities option, allowing users to create and schedule multiple activity events against gage records, with a dedicated entry screen for activity completion.

Improved Gage Life-cycle Tracking: GAGEtrak 8 provides expanded visibility into a gage's history and use throughout its life cycle. Where Used identifies the products associated with a gage, Accuracy History provides graphical trending of calibration measurement results, and the enhanced History tab provides a chronological record of transfers, calibrations, and other gage activity.

Improved Scheduling: The new scheduling options allow for more flexibility in your scheduling, such as choosing specific days of the week or month for items to come due.

Gage Templates: The new **Gage Templates** option improves on the **Test Point Group** management in prior versions and provides much greater control over gage records created by or linked to the **Template** records. If you have a change that affects multiple gages, you can simply update it on the template and update all of the linked gage records at once.

Batch Calibration Creation: Users can create multiple calibration records at once by selecting multiple gages from the **New Record** dialog, making it faster and easier to initiate calibrations for a group of gages.

IMPORTANT FEATURE CHANGES IN GAGETRAK 8

GAGEtrak 8 was developed on a modernized application platform, resulting in changes to some features and functionality available in earlier versions of GAGEtrak. In some cases, legacy features have been replaced by new functionality or a different approach; in others, they are no longer available.

The following information highlights important differences between legacy versions and GAGEtrak 8, including features that have changed or are no longer available, as well as new capabilities provided in GAGEtrak 8. We recommend reviewing these changes before upgrading so you can understand how they may affect your current workflows, configurations, and data.

REPORTS AND LABELS

The legacy stand-alone **Report Viewer** has been replaced by **GAGEtrak Info Center**, which expands read-only access beyond reports. Info Center provides access to the ad-hoc and standard reports available in GAGEtrak, along with grid views from major areas of the application. This provides organizations with a secure, cost-effective option for users who need to view gage information and run reports without requiring full GAGEtrak editing capabilities.

GAGEtrak 8 no longer includes the legacy **Custom Report Editor** for modifying standard reports and calibration labels. Changes in the underlying reporting technology used by GAGEtrak 8 made it impractical to continue supporting the legacy report-design interface.

To provide greater flexibility for everyday reporting needs, GAGEtrak 8 includes ad-hoc reporting from major sections of the application. Users can create report listings using the columns displayed in a grid, including customized column selections, filters, sorting, saved **Views**, and queries. This provides a convenient way to create and print customized listings without modifying a standard report.

For requirements beyond ad-hoc reporting, including modifications to standard GAGEtrak reports or labels, customizations can still be provided by our Development and Services teams. Please contact us for a quote.

As with previous GAGEtrak upgrades, custom reports and calibration labels created in GAGEtrak 6 or GAGEtrak 7 are not carried forward during an upgrade to GAGEtrak 8.

ARCHIVING

GAGEtrak 8 introduces a new **Archive Manager** and archive database structure. During the upgrade process, records archived in GAGEtrak 6 or GAGEtrak 7 are restored to the primary GAGEtrak database so that the data is preserved and available in the new environment.

After the upgrade is complete, records that should remain archived can be selected and re-archived using the GAGEtrak 8 **Archive Manager** and new archive database format.

USER-DEFINED FIELDS

GAGEtrak 8 provides six user-defined fields in each major entry screen, allowing organizations to configure field labels and field types for information specific to their needs. This change supports improved application performance, consistent use of fields throughout the application, and a modern XLIFF-based localization framework for translated interfaces. User-defined field labels remain customizable, providing flexibility for fields specifically designed for customer-defined purposes.

Due to differences in the user-defined field structure between legacy versions and GAGEtrak 8, user-defined fields and their data are not automatically migrated from GAGEtrak 6 or GAGEtrak 7.

If your legacy database contains important information in user-defined fields, please let our Technical Support team know before upgrading. We can review those fields with you and determine whether the data can be migrated into the available GAGEtrak 8 user-defined fields.

SECURITY

GAGEtrak 8 uses a simplified security model designed to improve application performance and streamline the management of user access. Because the security structure differs from legacy versions, GAGEtrak 6 and GAGEtrak 7 security groups and associated form rights are not migrated during the upgrade. Individual field-level security rights are also no longer supported.

CALIBRATION SCHEDULING

GAGEtrak 8 introduces a more flexible approach to calibration scheduling using Days, Weeks, Months, Years, and One-Time frequency units. The legacy Usage, Cycles, EOM (End of Month), and DOM (Day of Month) frequency options are no longer used.

End-of-month and specific day-based schedules can still be configured using the GAGEtrak 8 scheduling options. In addition, the **Pause Schedule** feature provides functionality similar to the legacy **Usage** frequency by allowing a calibration schedule to be paused while a gage is in storage and resumed when it returns to active use. Pause behavior can also be incorporated into **Transfer Rules**.

FILTERS AND SAVED VIEWS

Advanced filters saved in GAGEtrak 6 or GAGEtrak 7 are not migrated to GAGEtrak 8. GAGEtrak 8 provides enhanced grid filtering and **Saved Views**, allowing users to filter and sort data across multiple columns and save those configurations for future use. Saved Views can preserve column selections, filtering, sorting, and other grid preferences and can also be used with reporting and email notifications, providing greater flexibility for organizing and working with GAGEtrak data.

We want to make your transition as smooth as possible, so please contact us to discuss your needs. Together, we'll make a plan of action that will minimize your upgrade downtime and ensure that GAGEtrak will continue to support your quality initiatives.

GAGEtrak®

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