VERSION 8

GAGETRAK LITE

Intro Guide

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TECHNICAL SUPPORT

M-F 6:00 a.m. to 4:00 p.m., MST.
https://gagetrak.com/support/

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CHAPTER 1: INTRO & INSTALLATION

Overview

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!

How to Install

Whether you have downloaded your software or requested it on physical media, launch the GAGEtrak Lite executable (.exe) file. It is recommended to install GAGEtrak Lite under computer or domain administrative permissions. Once launched, the **GAGEtrak Lite Setup** screen will open; simply click **Install** to begin. Follow the on- screen instructions to complete the installation.

During installation, the **Data Utility** will open in order to create the database option you select (empty for new customers or sample for demo and training). In the **Connection Name** field, name your database connection; this will make the database connection easier to identity, especially if you plan to have multiple databases e.g., *Fixtures and Assembly Data* or by a location *Memphis Assembly No7*. Select the appropriate **Data Source Type** (use Standard SQLite option unless instructed by your IT team to select one of the other DBMS options provided). The **Database File Name** field is automatically populated; use the default value unless otherwise instructed. Click **Next**. When this process is complete, click **Finish** to close the **Data Utility** window.

If Installation Fails

If you are unable to install or you receive any error messages during installation, please run Windows Update if possible, restart your systems and try again. If it installation fails again, please write down any error messages and call tech support at +1 (480) 212-1257 for assistance.

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. Note: The database may be stored locally, so please ensure there are no database files that you want to keep before deleting the GAGEtrak Lite directory, i.e., the *Gtdata840.db3* and *Gtdata84_Archive.db3* database files can contain gage and calibration records. Windows 10 and 11 users: by default, GAGEtrak Lite installs to C:\Program Files (x86)\CyberMetrics...

Database Files

GAGEtrak Lite requires two database files to run properly: one for data and another for archived data. These can be created during installation on the first computer and once created, any other installs can use the **Connect to existing** option during installation. The default naming conventions created by the **Data Utility** are **GtData8x.db3** and **GtData8x_Archive.db3**. The archive database is created automatically whenever a primary database is created and this database is utilized solely by the **Archive Manager** application. The archive database file must have the same name as the primary database file. Additionally, the *_Archive* must precede the file database file extension. You can create a database with any name you prefer, but we recommend you keep at least some portion of the default naming convention, i.e., *GtData840_ACME.db3* and *GtData840_ACME_Archive.db3*. Further, do not change the file name once it created, as you risk losing your archive connections or adversely effecting any stored data connections for your GAGEtrak Lite users. If you are utilizing the SQLite option for your GAGEtrak database, the file extension is *.db3*. If using a Microsoft SQL Server, file extensions will be *.MDF* and if PostgreSQL, you will have multiple files, one for each table in the database, with the extension *.mkd*.

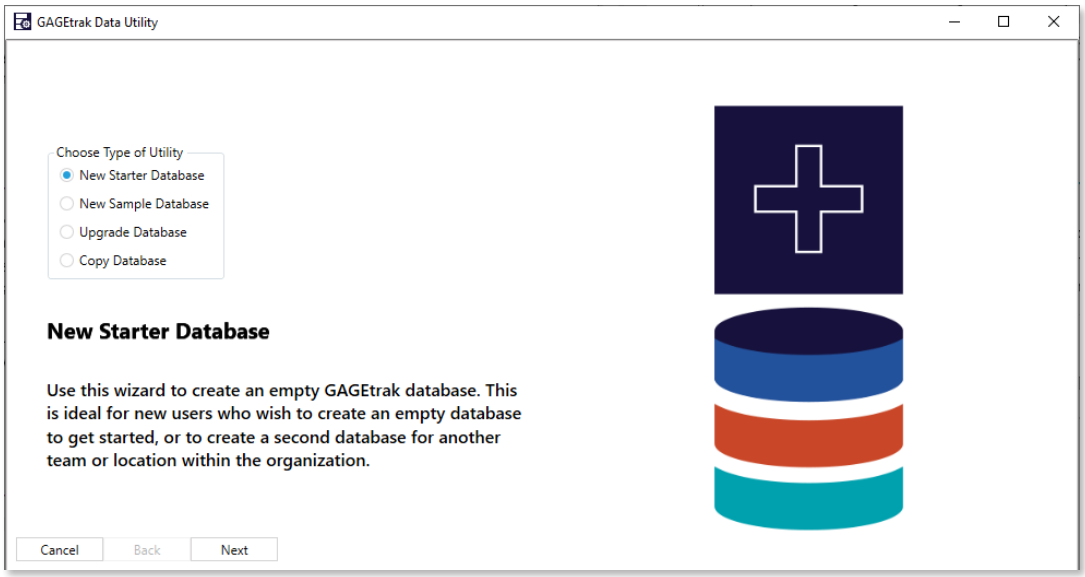
Client-server Option

While GAGEtrak Lite can run with a local database, it is designed for client-server environments. The client-server option is ideal if you intend to have several GAGEtrak Lite users share a database. This means that you can place the SQLite database files created during installation on your network share where all users have equal access. As stated in the System Requirements however, GAGEtrak Lite can also take advantage of a Microsoft SQL Server or PostgreSQL Database Management System (DBMS). These options provide a more robust database option for GAGEtrak users who wish to share data more securely or to integrate with other database applications. The **Data Utility** provided with your GAGEtrak Lite installation can be pointed to your specific database host server and it will create the databases required to run GAGEtrak Lite, if you provide a server account with sufficient credentials to do so.

Data Utility

The **Data Utility** is a wizard-driven application used to create GAGEtrak Lite back-end databases for data storage. In most cases, you will only ever need one database for your gage data. Some companies, however, may employ multiple database to separate operations, such as a separate in-house tooling database and another specifically for production gages. You may also want to create a sample database or copy your existing database for a sandbox or training database. The **Data Utility** can be used to create, upgrade or

copy databases, so it is a useful tool to have in your GAGEtrak Lite arsenal. After installation, the **Data Utility** shortcut is available in your GAGEtrak Lite Windows Program Group.



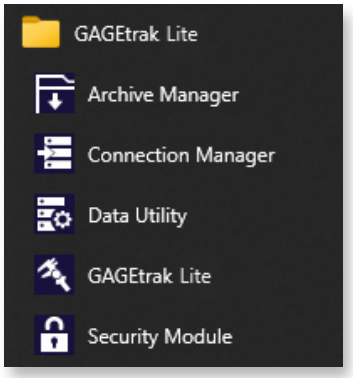
Upgrade Database

The **Upgrade Database** option in the **Data Utility** allows you to browse to and select your existing GAGEtrak databases from previous versions and transfer the data to one of the GAGEtrak Lite databases installed on your system or network.

To transfer and migrate your data from previous versions of GAGEtrak, open the **Data Utility** from the GAGEtrak Lite program group in your Windows Start menu (see **Launching GAGEtrak Lite** instructions below), click the **Upgrade Database** radio button and then click **Next**. Follow the on-screen instructions.

Launching GAGEtrak Lite

Locate the GAGEtrak Lite program group in your Windows Start menu; this contains shortcuts to the GAGEtrak Lite application along with several other utilities and functions. Please do not modify the properties of these shortcuts, as this may affect the program's ability to correctly launch.



Security Manager and Login

GAGEtrak Lite provides a group-level security option, which can be managed and enabled with the **Security Manager**, located in the GAGEtrak Lite Windows program group. If security is activated through the **Security Manager**, the **Login** window will appear upon launch. Enter your User ID and Password in the appropriate fields and then click **OK** to log in.

License Registration and Management

A **License Code** is required to run GAGEtrak Lite. Once launched, the **Register License** dialog will appear and give you the opportunity to enter and validate your **License Code**. Enter the code provided by CyberMetrics or your authorized distributor and click **Check License** to verify and register your account.

GAGEtrak versions 8.2 and higher require a persistent Internet connection for product activation and for on-going license management. Once activated, you will not be prompted for this code again, unless you completely uninstall and reinstall the product. You can view your license code and other registration information in the **About** window within your GAGEtrak software.

Please Note: Your GAGEtrak Lite application requires a persistent Internet connection. Without Internet, the application cannot verify your license and it will not run.

Troubleshooting License Issues

If you are having trouble registering your license code, then you are likely restricted in some way from reaching our license host. A simple test can be performed to determine if you are blocked by going to my.nalpeiron.com. If you can access this site, then our software is being prohibited in some other way from validating your license. Proxy servers and firewalls can restrict certain inbound and outbound traffic and for certain ports or URLs.

Firewalls

In the case of a firewall restriction, you will need to ask your help desk or IT provider if they are restricting this site and if so, request that they whitelist the site below:

- **License Activation and Validation**
  URL: my.nalpeiron.com
  Port: 443

Proxy Servers

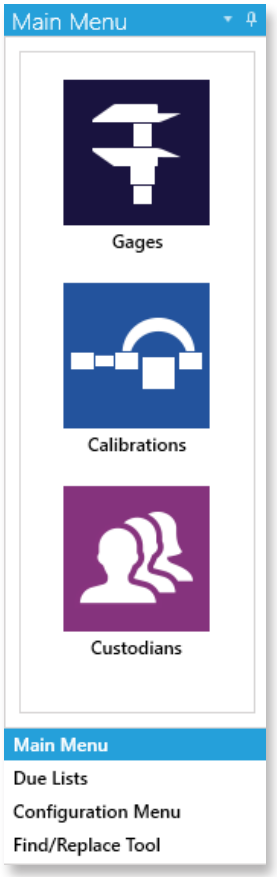
If a proxy server is employed at your location, go to the **About** window (**Help -> About -> License Management -> License Proxy** tab) to enter proxy host and authentication information. This will allow our application to negotiate access to our license host.

CHAPTER 2: 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 throughout the application. You should become familiar with these conventions before you begin using GAGEtrak Lite.

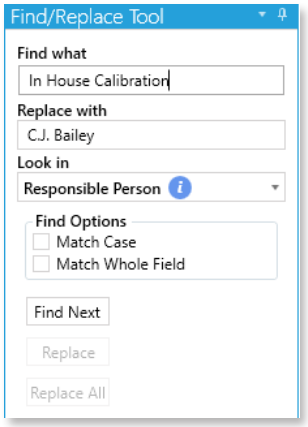
Navigation Menu

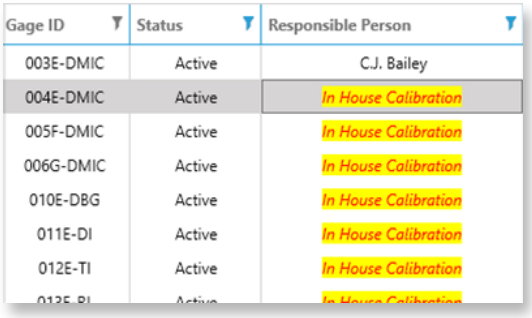
At the bottom of the **Navigation Menu**, you can access the **Main**, **Configuration** and **Due Lists** menus and the **Find/Replace Tool**. The menu pane can stay visible at all times or it can be undocked (by clicking the pushpin icon) to access it only when needed, which opens up more workspace. This menu system gives you the flexibility to quickly navigate to each area of the application without having to close out previously opened forms or losing your place while seeking information from other areas.



Find and Replace Tool

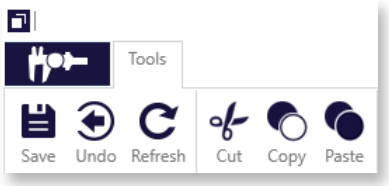
Located at the bottom of the **Navigation Menu**, the **Find/Replace Tool** is very useful for locating and highlighting items in **Grid Views**. This is also a very useful tool for locating and replacing large amounts of data in fields that cannot be managed by the **List Management** capability. Please note, however, that while the **Find/Replace Tool** can be very useful in your data clean-up efforts, you will want to be extremely careful with mass changes, as they cannot be reverted once they are applied and saved to the database. Therefore, it is recommended that you make only small changes at first, until you become more accustomed to its capabilities. Additionally, if you use the **Replace** option in a list-managed field, you can only replace with existing items in that list. Further, the **Find/Replace Tool** is only capable of locating what is currently visible, so filtered records will not be located and the **Find/Replace Tool** or its options will be grayed out or unavailable if the selected items are not applicable to its use.



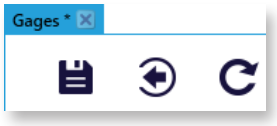


Tools Menu

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



Some **Tools** menu items, like **Save**, **Refresh** and **Undo** are also visible in the header of most data entry views. The **Save** and **Undo** icons will be grayed out until a record is modified. Changes to records will activate these icons and an asterisk will appear on tabs or drop-downs to indicate unsaved changes as well. If you attempt to leave a view with unsaved changes, you will receive a prompt to do so before you can exit.



Infotips

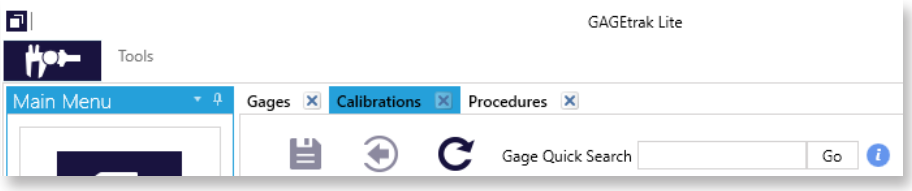
Infotips provide useful information about various features and functions throughout GAGEtrak Lite. Hover your mouse cursor over an infotip icon to get context-related information for that field's purpose or capability.

Backstage Menu

Click the caliper icon to access the backstage menu area from the upper-left hand side of the Main Menu. Available in all entry screens, the backstage menu provides specific application settings, unique to this computer install. From here, you can control settings such as themes and application performance, as well as manage your database connections, email configuration and access license and help information.

Master Tabs

The **Master Tab** feature permits multiple forms to be simultaneously open, 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. In the image below, the tab highlighted is the active tab and the asterisk next to the tab name indicates an unsaved record.



Record Navigation Bar

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) which simultaneously display record details and a data grid. The details view displays one record at a time; the grid view displays several.

The type of view (details, grid or split) that was most recently used will be retained as the default view the next time you open that entry screen; the default view cannot be deleted.

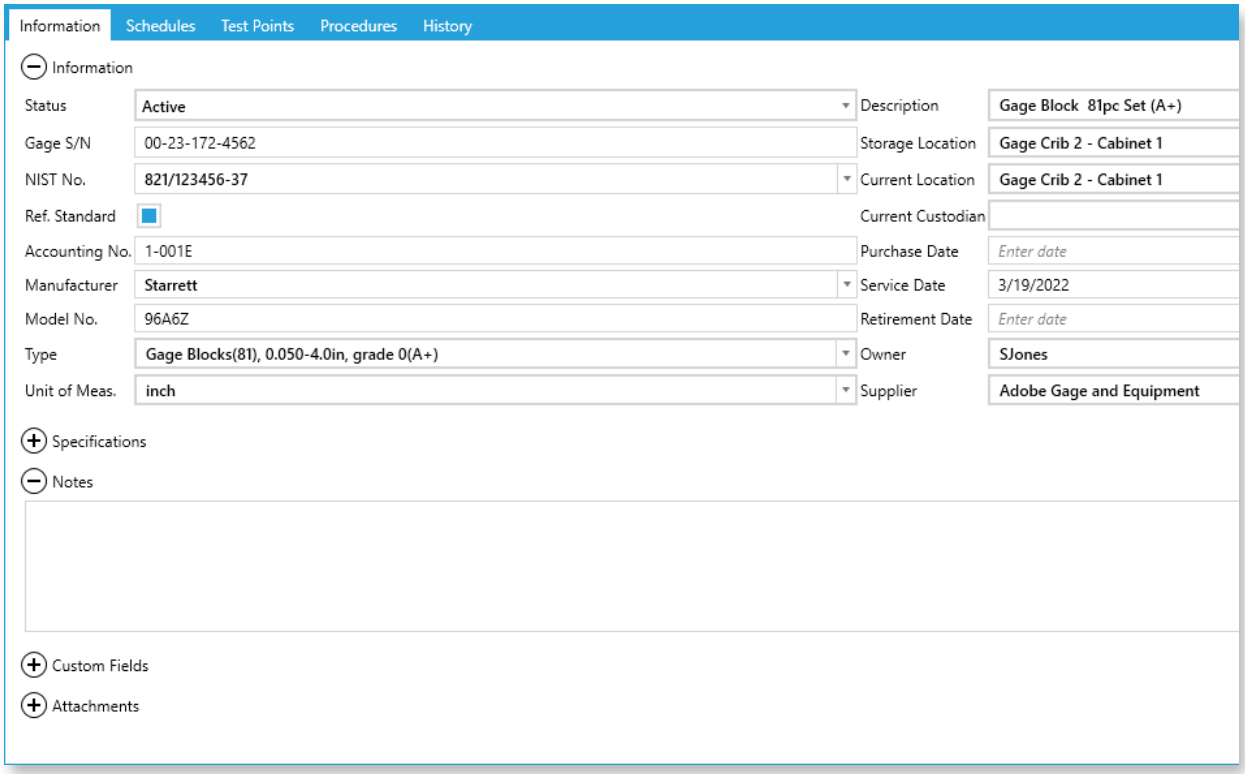
When you make changes to the default view, such as opening group box expanders in the details view or moving columns in the grid view, those changes are retained as your **Current View**. (The **Load View** field will display **Current View**.) The next time you open that screen, your **Current View** will be displayed.

Details View

Record information is displayed as a form when using the details view and unlike grid view, users are viewing only one record at a time. To see this view of any record, click the **Details View** icon: .

Group Box Expanders

Group box expanders save space when in a collapsed state and will decrease the need to scroll on form details that contain more information. If they are left open (expanded), they will be saved as part of any view you are in and will remain open for the next time. In the example below, the **Information** and **Notes** groups have been expanded, while all other groups remain collapsed.



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 will be highlighted. 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 managed lists.

A self-building drop-down list allows you to manually enter a new value which can be automatically be added to the list for future selection, and with no restriction. For instance, the **NIST** field in **Gages** allows a user to enter any applicable value. These fields will typically support auto-fill behavior.

A managed list contains data that is more restricted and may only allow a user to enter new values if the **List Management** configuration permits it. For example, in the **Status** drop-down list in the **Gages -> Information** tab, values for this field can only be created within the **Settings -> List Management** tab. Since this field is restricted, users can only select from existing status values. This data management tool ensures you do not have erroneous data entry to clean up in critical data fields. An administrator, however, can configure some drop-down lists to accept new values from the user, if the user chooses to save the value to the list. In those cases, the user will be presented with a **Save** icon for the new item (like the one below). This can ensure users are prompted to check their work before saving a misspelled value to a list, and therefore, saves on data clean-up efforts later.

Grid View

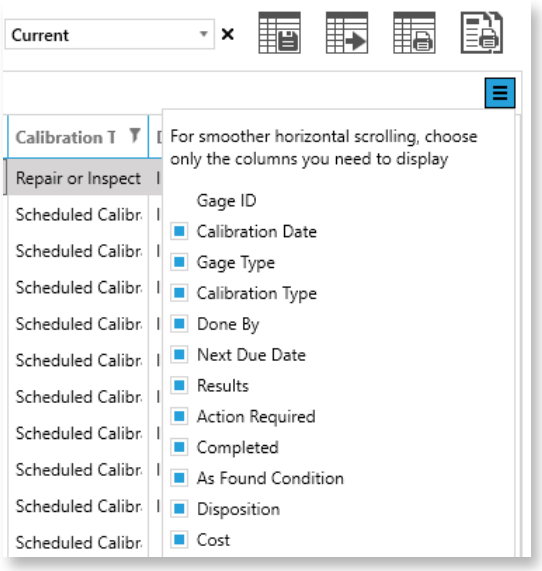
Grid View operates similarly to a spreadsheet program, displaying many records at once, so it can be a more efficient interface for adding or modifying your records. Click the **Grid View** icon . Each row represents a record and each column represents a field. In grid view, you can view, add and edit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

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 particular record. When a record is selected, you can delete it by clicking the Delete icon in the record navigation bar; deletion confirmation will ensue.

With the exception of ID fields, most other fields can be altered in Grid View by simply clicking on them to enable the cursor. Always save modifications by clicking the Save icon .

Column Chooser

Located in the upper-right corner of the grid is the **Column Chooser** icon ☰. This is an invaluable tool for setting up your views and ad-hoc report output. You can use drag-and-drop to position columns in your grid view from within the column chooser window or directly from the grid. Use the checkbox to the left of each item on the chooser window to make it visible in your grid views or to remove it.

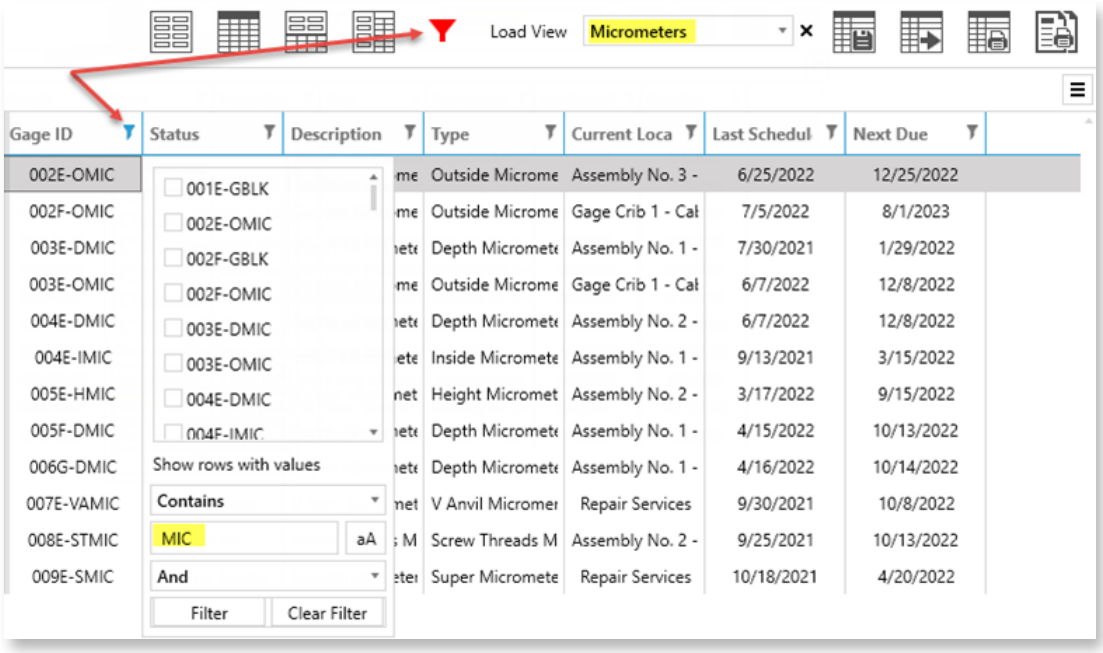


Sorting Records

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. Click once for ascending, again for descending and a third time will remove the sort on that column. A small black arrow is visible on fields that have been sorted by the user. Note: Most views have a default sort order, typically by the identification fields, such as **Gage ID** or by date, such as **Calibration Date**. If you change the sort, it is saved automatically and the next time you return to that view, your previously selected sort will remain (see the **Saving Views** section).

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 and a red filter indicator will be visible in the header (this is to notify the user that a the current records are filtered and may not be displaying all of the records in the database). To remove a filter, click the blue filter icon and then click **Clear Filter.**

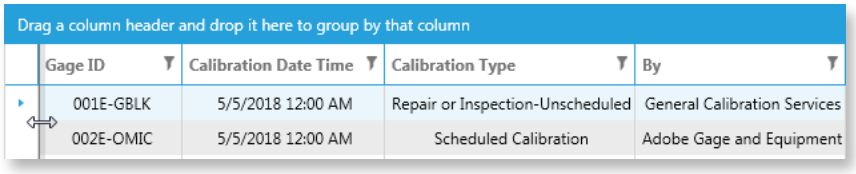


Saving Views

After filtering records, you can save your filter criteria for future access. It is also important to note that saved views are also used to generate reports and email notifications. 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. To delete a previously saved view, select the view and click the red X; confirm the deletion. Saved views will only be visible to you, unless you check the **View Sharing** option provided. Once shared, any user cab see and manage that saved view. Views are a great option for presenting your data is several ways and we think you will find them to be an invaluable tool for viewing and managing your data.

Freezing Columns

When in grid view, there is a vertical gray bar at the left of the grid. Hovering over the bar with your mouse will change the mouse pointer to a double arrow. Click and drag the bar to the right; any columns of data that remain to the left of the bar will be frozen for scrolling.



Exporting Records

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**. Any records that are currently visible in that view will be exported. For example, if your grid view is filtered to show only micrometers, then your exported output will only contain those micrometer records. Note: This capability is also available in detail view, but it is easiest to export from grid view, so that you can determine which columns will appear in your export.

CHAPTER 3: SETTINGS

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

Settings – Information Tab

Enter a **GAGEtrak Instance Name** if you intend to utilize GAGEtrak for MQTT Publishing. This is the unique name for you GAGEtrak instance, which is used in MQTT and other applications (see the **Settings – MQTT Publishers Tab** section). If you will not be utilizing the MQTT Publisher capability in GAGEtrak, you can leave this field blank.

Enter your company's information in the **Company** group box. Your company name and division name will appear in your report headers. Here you can also enter your text that will appear on certificate reports, as well as your company logo which will be displayed on all reports. 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, you can use a screen capture program to capture the graphic and then copy it to the Windows clipboard. In GAGEtrak Pro, you would then click the **Paste Logo** button and the graphic will be displayed in the **Logo** field. Click the **Save** icon.

Settings – Calibration Tab

The **Calibration** tab provides configurations for calibration-related items.

Default Reports

Here you can select the reports that appear by default when you click the **Print Report** or **Print Label** buttons found in **Calibrations** (bottom of details view or on the right-click option in grid view). Choosing the defaults here will mean that you do not have to select these each time you create a new record.

CyberSensor Settings

This section is only utilized if you have purchased the CyberSensor add-on product. The CyberSensor can be used to automatically populate the **Temperature** and **Humidity** fields in **Calibrations** with the current room temperature and humidity. Since the CyberSensor unit itself cannot be adjusted during verification, it may be necessary to enter a temperature correction if one is provided. For example, if a CyberSensor is found to be off by -0.25 degrees Fahrenheit when tested against a master, then you would enter the correction value of .25 here to ensure that an accurate temperature in populated when that CyberSensor unit is selected during your calibration. The **Serial Number** differentiates one CyberSensor from another should you have multiple units in use.

Settings - Schedules Tab

Skip Days and Skip Dates

GAGEtrak Lite lets you define dates that you want skipped when it calculates calibration due dates. These 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 or previous working day, depending on the **Skip Date Direction** setting for each gage. Here in the **Schedules** 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, 2022 as 11/1/22, 11/01/22, 11/1/2022, 22/11/1, 22/1/11, or 2022/11/1.

Because GAGEtrak Lite's reports use only numeric dates, you can select only numeric date formats. Therefore, you can't use dates like "November 1, 2022."

As a precaution, you may want to verify your date settings in Windows. Click the Windows Start button and navigate to the **Control Panel -> Region -> Formats** tab. 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.

Due Listings Settings

In the **Due Listings** pane, set how far out GAGEtrak Lite should display schedules as due or past due for calibrations and due and past due flags on the **Gages** detail form. Here, you can also decide to include past due schedules in Due Listings.

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 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)

Settings – List Management Tab

Earlier in this guide, we touched on drop-down lists and it is here, in **List Management**, that you can configure how the lists will behave and manage their content. The options here allow you to configure and control the content of common list boxes found throughout GAGEtrak Lite.

Gage Status, **Gage Type** and **Calibration Type** are just a few examples of data that you will come to rely on when locating records. Therefore, how you control the user's interaction with these data objects is integral to keeping a searchable and comprehensive database. The value of managed lists is that you can limit the collection of bad or erroneous entries that tend to collect in a database over time. In many cases, you will inherit this data, and managed lists will give you the means by which to clean it up and control future entries.

In addition to controlling the data that populates these important lists, you can also control how GAGEtrak Lite will interact with these values. For instance, you can determine if GAGEtrak Lite will ignore due dates for gage records in your system that have a **Status** value of **Scrapped**. You can also control if users are allowed to create records from assignment fields, i.e., allow a user to create a new **Custodian** record when assigning **Responsible Person** on a schedule.

Also managed here is the **Calibration Signature Level**. Should you decide to use the electronic signature functionality available in GAGEtrak Lite, this area allows you to add or remove electronic signature levels for your calibration records; depending on your quality process, you may need more than one individual to sign on a completed calibration.

Settings – Custom Tab

Though GAGEtrak Lite provides an abundant number of fields for storing data in each category, you may find you need still additional fields.

For this reason, each major entry screen accommodates six additional user-definable, custom fields. In this tab, you can create your own custom field labels for each of the six fields provided in each part of the program. There are four text fields, one date field and two list box fields for each major application screen.

Also found in this tab is a data administration tool for removing saved views when they are no longer needed or they have ceased to function. If a saved view becomes corrupted, for instance, the users will often be blocked from accessing that view as a result. By removing a corrupted view here, you can restore the default view for that section. You can also reassign Custom Views if for instance, a staff member leaves, but you want to retain that person's saved views.

Settings – MQTT Publishers Tab

MQTT (Message Queuing Telemetry Transport) is a lightweight messaging protocol ideal for low-bandwidth, high-latency or constrained environments. It supports real-time, decoupled communication between devices and systems.

MQTT allows devices to publish messages to a central broker, which then sends those messages to all devices or applications that subscribed to that topic. For instance, in a smart factory, a temperature sensor can publish readings every second. The quality control system subscribes to those readings to make real-time decisions, while a historical analytics tool also subscribes to log the data.

GAGEtrak is an MQTT Publisher. This means that any changes to gage or calibration data can be published to a Broker in your MQTT ecosystem.

If your organization is utilizing IIoT (Industrial Internet of Things) in your facility, it is possible to add your GAGEtrak client to that ecosystem by establishing an MQTT Publisher in this tab. Once established, your GAGEtrak client will begin publishing gage or calibration data to either JSON files or to URI, which can then be processed by a Broker in your ecosystem or by the GAGEtrak MQTT Broker application (purchased separately).

A typical use case is sending Gage Status, Next Due Date or Current Location to an SPC or other quality management application that is capable of subscribing to MQTT topics. Once configured, GAGEtrak will publish any changes in **Gages** or **Calibrations** to a JSON file or to a URI (Uniform Resource Identifier).

IMPORTANT: You will likely need assistance from your information systems or integration team to assist in setting up the MQTT Publishers. Do not attempt to set up a Publisher record without knowledge of your MQTT ecosystem.

CHAPTER 4: BASIC RECORD ENTRY

Gages

To begin entering your gage records, select **Gages** from the Main Menu. This is the primary view where all of your gage records are created and tracked in GAGEtrak Lite.

Gages – Information Tab

To create a new gage record, click the **New Record** icon ⊕ in the record navigation bar. You must enter a unique alphanumeric identification code (**Gage ID**) for each gage 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 search for a particular gage record for viewing or editing, you can locate and select it in grid view, use the **Gage Quick Search** field, or use the **Gage ID** column filter in the grid.

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 will not be visible until the calibration **Schedule** tab is complete with a **Next Due** date.

Additionally, if the gage's **Status** value is configured to ignore due notifications, then the **Next Due** date field and related flags will also not be displayed. See the **Settings -> List Management** tab section for how to set **Status** values to be included in due listings. The **Status** field is an invaluable search tool and is an important indicator as to whether gages are tracked for calibration or available for transfers within GAGEtrak Pro.

Check the **Ref. Standard** checkbox to indicate that the record is a calibration reference standard (such as a gage block or reference weight). Enter NIST numbers for reference standards traceability.

Gage Cloning and Gage Templates

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.

Alternatively, you can create new gage records from pre-defined **Gage Templates**. When you create a new gage record, you will see the option to create **From Gage Template**. This option not only saves time, but also provides you with a valuable tool for updating information on linked templates in the future. Gages that are created using a given template are linked to that template record. Therefore, any changes you make to the template can be used to update en masse for gage records that share the same template link. Note: For users of previous GAGEtrak products, the Gage Template feature expands on the Test Point Group and Standards Groups capabilities.

Renaming a Gage

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

Gages – Schedules Tab

In this screen, you will set up the schedules for each gage. While the primary focus of GAGEtrak Lite is the calibration schedule for your gages, you can also set **Reminders**.

When you first enter the gage record, be sure to enter the gage's **Last Schedule Date** for each of the schedule options you want to track. Later, the program will automatically update this field as you create and complete historical records for each of the schedule options, i.e., creating and completing a calibration record for the gage will automatically update the **Last Schedule Date** and the **Next Due** date.

As stated above, the **Next Due** field is automatically updated whenever you create and complete an associated calibration, activity or MSA record for recurring schedules (**Next Due** = **Last Schedule Date** + frequency). Any recurring reminder schedules will reset when the current reminder due has been dismissed.

To manually calculate the next due date immediately after you have entered a frequency and last schedule date, click the **Calculate** button. If required, you can also manually enter any date into the **Next Due** field. It is important to understand that the **Next Due** date provided determines what will appear on your **Due Lists** and which other notification methods will appear. In **Gages**, the **Next Due** field label will be replaced with **Due** or **Past Due**, based on the current operating system date. Please note that gage records with a **Status** value that is configured to be excluded from due lists will not display a **Due** or **Past Due** flag.

Schedule Frequencies

Choose from standard frequency units (Daily, Monthly, Yearly or One Time). The **Recurs every** options allow you to select the specific number of frequency days, months or years required to calculate next due dates. You can also choose from specific recurrence points, such as the first Monday of every 24 months. The recurrence options provided give you flexibility and control over your scheduling.

Pausing Schedules

Pausing a gage's schedule can be used to limit the days the gage progresses toward the original specified due date for that schedule. For instance, gages that will only progress towards a scheduled calibration due date for days the gage is actually in use, could be paused whenever that gage is returned to the crib and is no longer in use in production. A gage's schedule can be paused manually from the **Schedule** tab, or it can be automatically paused when it is transferred using a rule that pauses the schedule, i.e., transferring a gage using a **Return to Crib** rule (GAGEtrak Pro only).

The **Allow Pause** feature in GAGEtrak should be used for crib gages that may spend significant time in storage before or in between uses. It is also highly recommended that only the **Daily** frequency option be used for gages that will have their schedules paused (a Yearly or Weekly schedule may yield confusing results). Therefore, the **Pause** capability is intended to be measured as usage days, days in use, etc. **Allow Pause** should also not be used to count cycles of use or times used in a given day.

You should not use the **Pause** feature for gages that have fixed schedules. If you put a calibration sticker on your gages, you will have to print a new label once the gage schedule is resumed, since it will now have a due date further into the future.

The **Pause schedule when calibrated** option means the gage will not have its next due date calculated when a calibration record is completed. Instead, the next due date will be calculated only when the gage schedule is resumed, i.e., once the gage is transferred out of the crib for use. This option is ideal for outsourced calibrations when gages are returned sealed and will not be placed into service immediately.

Time Left and **Time Used** are read-only fields that provide visibility into the times calculated at the last **Pause/Resume** cycle. They do not necessarily reflect the current time left, however, as this will change as days have elapsed since the last **Pause/Resume** cycle.

If you want to create an ad hoc report on how many days a gage has been used, or how many days remaining until due, the **Time Left** and **Time Used** fields are visible columns in the datasheet view. You can use the available column filters for more precise report results. Pausing can be a great tool for extending calibration due dates to reduce calibration time and expense. Do be cautious, however, as extending due dates in this way can have an adverse effect on your quality management effort if it is not monitored closely. You can achieve a similar result by identifying the ideal calibration frequency based on common frequency adjustment factors or stability study results.

Pause and Resume Simplified:

- **Pause** stops time
- **Resume** starts time
- **Calibration** resets counters, but does not stop time (unless configured)
- Each **Resume -> Pause** cycle = 1 full day of **Time Used** (even on the same day)
- No valid start date = no **Time Used**

Skip Date Direction

If a calculated calibration due date falls on a skip day or date, GAGEtrak Lite schedules it on the following or previous working day, depending on the **Skip Date Direction** setting for each gage. However, you can set the default skip direction in the **Settings -> Schedules** tab.

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.

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

Gages – History Tab

The group box content in this tab has been designed to provide a quick look at important historical information for each gage record, such as calibration history. This is very useful in an audit situation, as you will have immediate access to a gage's complete history all in one tab. For a detail look, right-click on a record to open it in its native view.

Calibrations

The **Calibrations** window is where you will establish your history of calibration for each of your gages in your GAGEtrak Lite inventory. To enter calibration records, select **Calibrations** from the Main Menu.

Calibrations – Information Tab

When you first open this screen, GAGEtrak Lite displays the most recent View. By default, the records will be sorted to display the most recent calibration records. However, if you have sorted by a different field, such as **Gage ID**, then the default sort will be removed and when you later return to the **Calibrations** screen, records will be sorted by **Gage ID**.

From the **Information** tab, you will be able to document many details about each calibration. Once a calibration record is checked as **Completed**, the **Next Due** date will be calculated and several of the fields in this record will be locked to avoid accidental changes to the historical data. If you want the records completely locked and controlled, see the **Electronic Signature** section of this guide.

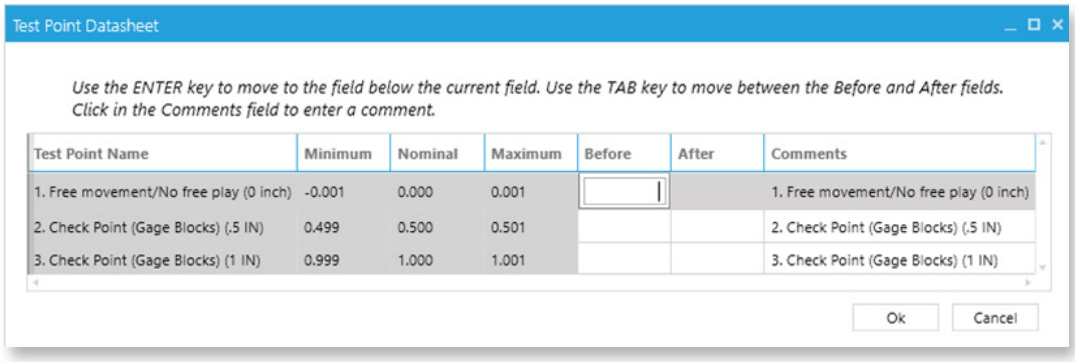
To create a new calibration record, click the **New Record** icon and then select the desired gage from the **Gage** list (or select multiple gages to batch create calibration records). GAGEtrak Lite automatically displays the current operating system date. If you have selected multiple gages, you can assign them all the same calibration date, calibrator (**By**) and **Calibration Type**. You can also alter the gage's **Status** and **Current Location** in this window.

Calibrations – Measurements Tab

This form accommodates measurement documentation for your calibration or verification inspections. If you have defined **Test Points** in the gage record, those will carry over here in the **Measurements** tab.

GAGEtrak Lite supports multiple reference standards on each test point, so that measurements that utilize a combination of master standards will be documented for standards traceability. Measurements can also contain multiple tolerances within a single calibration. This permits accurate tolerance recordings for gages or instruments that support multiple +/- 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.

The **Test Point Datasheet** button provides a rapid data entry grid, so that measurements can be entered quickly using Tab stops. This grid is also useful for collecting data from external sources, such as the WinWedge Pro solution or from a USB or RS232 serial-enabled gage.



Calibrations – Procedures Tab

In this screen, you can see any calibration procedures linked to the gage record; procedures are read-only in this area. If you click the **View** button, the procedure will open in print preview in a separate tab, which can then be printed or exported to a supported format. To edit procedure records within GAGEtrak Lite, go to **Procedures** from the Configuration Menu.

Calibrations – Signature Tab

Should you decide to use the electronic signature functionality available in GAGEtrak Lite, this **Signature** tab will allow you to digitally sign and lock each calibration record. This will ensure that the historical record for each calibration cannot be modified or tampered with after the fact. The record can be unsigned if needed, providing a digital record with justifications for doing so. Based on your quality policy, you can also specify as many signature levels as are needed, and in what order they must be signed or unsigned. You must have GAGEtrak Lite Security enabled to utilize this feature.

CHAPTER 5: PRODUCTIVITY TOOLS

Due Lists

Select **Due Lists** from the Navigation Menu. The GAGEtrak Lite **Due Lists** feature organizes and presents pre-filtered information in an easy-to-read format and allows for interactive record navigation.

The **Current Range** shown at the top left of a **Due List** is dictated in the **Due Listings** section of the **Settings -> Schedules** tab, such as 30 days, 90 days, etc. Past due items will be anything older than the current date, and for gage status values that meet the criteria. If you do not wish to display **Past Due** information, this can be disabled in the same area of **Settings**. In the grid portion of any due list, click any column header to sort the data by that field.

To create a record directly from this list, such as a new calibration record, first 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 records from the right-click menu (this is useful to avoid creating duplicate records for due items).

Calendar

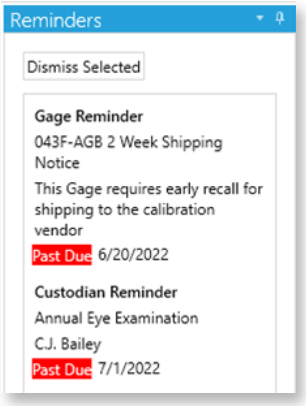
The **Calendar** provided in the **Due Lists** menu is a companion to the standard listings that allows you to see items due in a daily, weekly or monthly perspective. The **Calendar** differs from the **Due Listings** in that it is not only a valuable visualization tool, but also provides an easy drag-and-drop capability to reschedule items when conflicts are found. Simply drag a due item to a new date in that month to easily reschedule. Be mindful, however, that while this will assign a new due date for that gage, you may already have gage labels or other reports issued that will reflect the previous due date.

Custodians

A custodian is any entity (human or organization) that may have custody of a gage at any given time, past or present. A custodian can be a calibrator, gage end-user, vendor, supplier or customer. Custodians can also be authorized persons, notification email recipients or GAGEtrak security users. If you have migrated to GAGEtrak Lite from a prior version, your **Supplier** and **Staff** records will be found here, with a **Custodian Type** of Supplier or Staff, respectively. The **Custodians** section can be an invaluable tool for tracking the human and organizational influence on a gage's life cycle.

Reminders

Reminders are visible only within the GAGEtrak applications and can be used to provide in-window notifications of things that do not require a historical record to be created. For example, you can set a reminder on a gage record to remind you two weeks before a gage comes due to recall it early for shipping to a vendor. Or, you can set a reminder on custodian records to remind you when eye exams are due for your staff. Reminders can be one-time or recurring and you are not limited on how many you can set. In the upper right corner of the program window, hover over or click **Reminders** to see a list of all reminders coming due. You can also view due and upcoming reminders in your due lists.



Reports and Labels

GAGEtrak Lite provides ample reporting in each relevant area of the application. For example, any reports related to your gages and their upcoming schedules can be run directly from the **Gages** screen. For historical and calibration-related reports, locate these in **Calibrations**, etc. Reporting in GAGEtrak Lite was designed to provide report output from the very screens you are working in day to day, rather than having to access a separate section of the program for reporting. As covered earlier in this guide, any **Saved Views** you created in each entry screen can be used to generate report output from your filter results. Reports in GAGEtrak Lite are available in two formats, ad-hoc listings and canned reports.

Ad Hoc Reports

Ad hoc reports are customizable and allow more control over the content of your report listing. The **Column Selector** and **Saved Views** mentioned earlier in this guide will allow users to not only select the columns that will appear on the ad hoc report, but also control the sort order and specific records that will appear on the report output. Creating and saving pre-filtered views will play a pivotal role in ad hoc reporting; when emailing reports on a schedule, you specify in the **Notification Manager** which view to use for the report output when it is sent to your recipients.

Canned Reports

The canned reports available in each major view are pre-formatted reports designed for each particular need. Reports such as Calibration Certificate, Gage Detail and Calibration Work Order are among a few examples of these purpose-built reports. Like the ad hoc reports, the canned reports in GAGEtrak Lite will also use the your saved views for output. For example, if you are currently on a view that contains only your active, in-house gages, then the Gage Detail Report output will only contain these records. You can also use the **View Name** to your advantage, as it will appear as a subtitle on all of your reports, such as in the example below using our Active Gages-In House view name.

Your Company Name

Division Name

Gage Detail Report

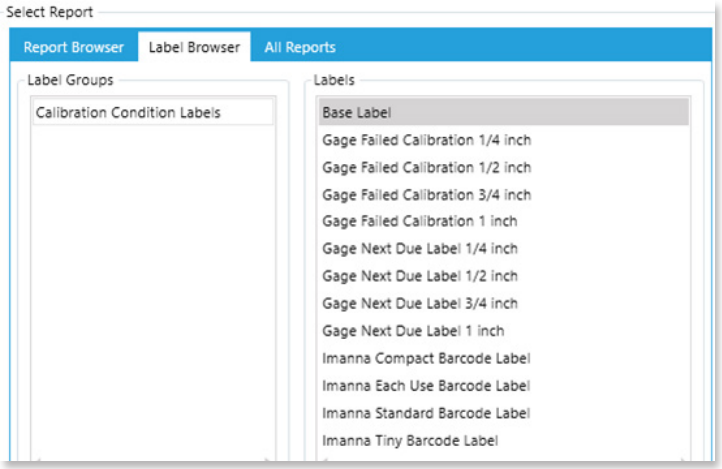
Active Gages-In House

10/6/2022 3:57 PM Page 1 of 36

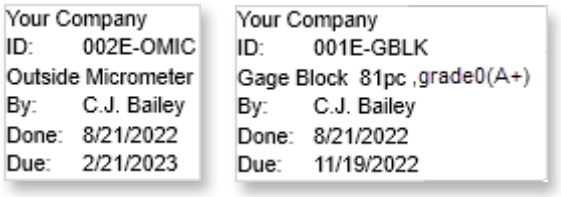
Gage ID:	003E-DMIC	**Calibrator:**	In House Calibration
Gage SN:	1356-245893246547	**Calibration Freq:**	6.00
Accounting No:	3-003E	**Calibration Freq UOM:**	Monthly
Model Number:	450-7890	**Calibration Hours:**	1.00

Labels

Gage and calibration labels are also considered to be report output. Therefore, the labels are accessible via the **Canned Report** sections, where applicable. Various sizes of labels are available for both your calibration and gage records.



It is important to note that the sizes specified are for the height of the labels only, not the length. In the example below, the 1” label report output is one inch tall, but length will be dictated by the data that is presented, and hence may be a little longer for one gage record than it is for another.



Record Archiving

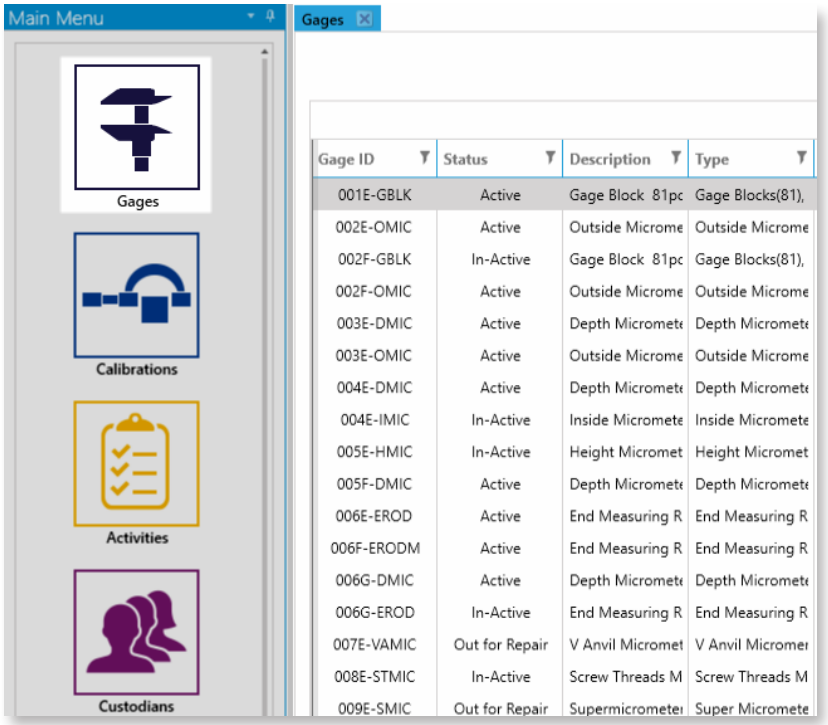
Over time, you will inevitably build up significant historical data for your gages, and this can create a great deal of clutter when you are navigating your records. Deleting historical data from your primary database is one way to reduce clutter and improve application performance, but can result in findings or compliance issues with customers and auditors. For this reason, GAGEtrak Lite has a dedicated **Archive Manager** application, which can be accessed from the GAGEtrak Lite Windows Program Group. The **Archive Manager** application presents read-only data from your current GAGEtrak Lite database connection and allows you to archive and unarchive historical data such as calibrations and transfers. Therefore, the **Archive Manager** is a safe and effective way to remove records from your primary database and safely store them elsewhere.

CHAPTER 6: INFO CENTER

GAGEtrak Info Center is a read-only access point from which managers or gage end users can retrieve and report on various aspects of GAGEtrak data when a full license of GAGEtrak is not required. This stand-alone utility connects to your GAGEtrak Lite database(s), allowing you to generate ad-hoc reports, filtered and sorted as needed, as well as formatted canned reports for gage, calibration and custodian records. If you are a current user of GAGEtrak Info Center, then this chapter will give you a brief overview of this application's capability.

Navigation Menu

The main navigation menu in GAGEtrak Info Center provides access to all of the primary data views available in the GAGEtrak Lite core application. Click on any of the icons provided in the menu to view data for each relevant view. You can also use the **Find/Replace Tool** located in the Navigation Menu to locate records, but please note that because Info Center is read-only, the Replace capability will not be available.



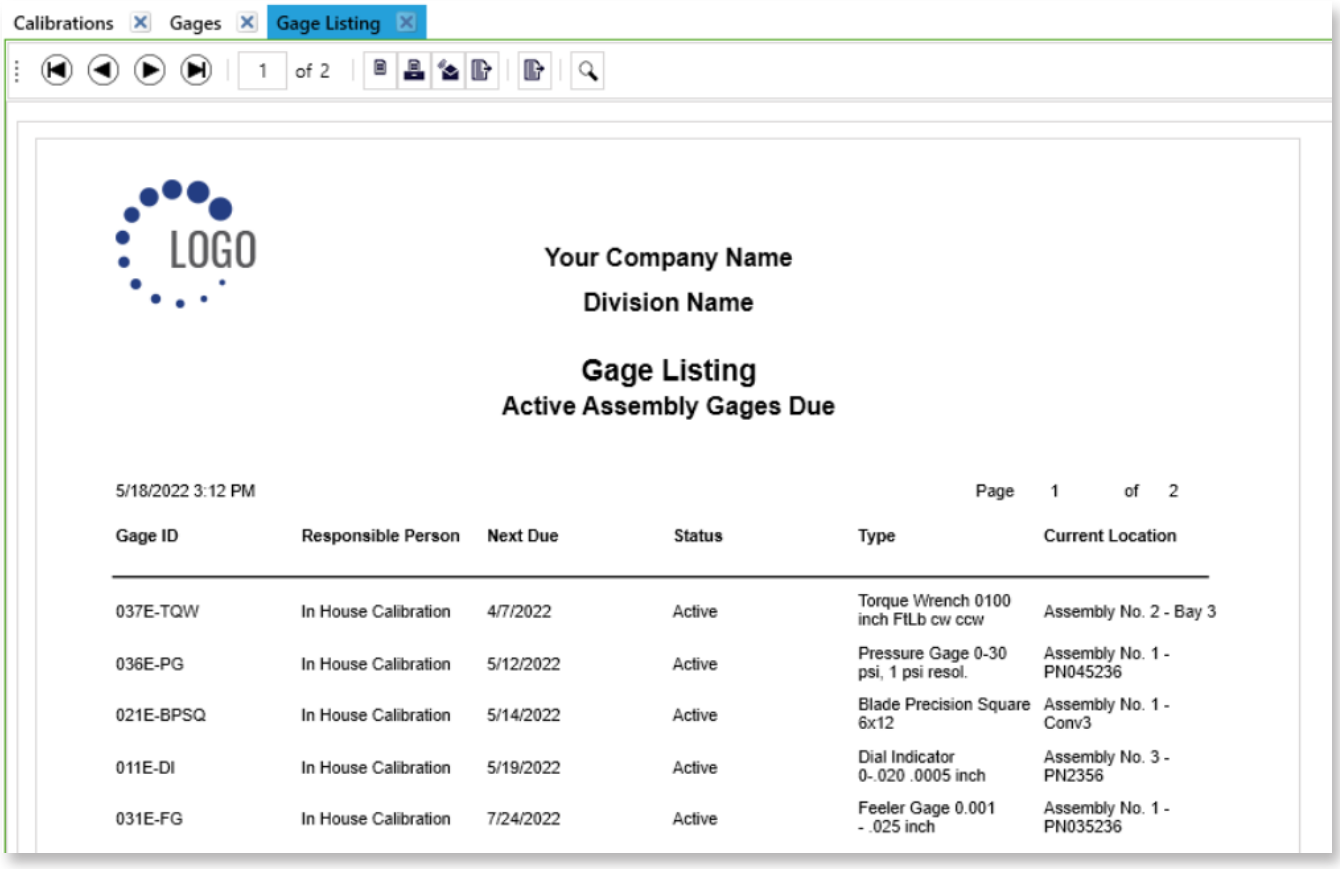
Grid Views

Info Center presents all data in grid views. These grid views can be modified by hiding or repositioning columns and the data can be filtered and sorted in any way you choose.

You can then save each view if you intend to use it again or if it will be emailed or exported on a regular schedule. Additionally, you can share your saved views in Info Center and they will be visible to the GAGEtrak core application users as well. Additionally, any views saved and shared in the GAGEtrak core application will likewise be visible to Info Center users.

Generating Reports

Both the ad hoc and canned reports (including cal certs and failure notices) are generated directly from relevant areas of the program and with just a few clicks, you can sort, filter, modify, export, print, save and email reports. You can also schedule recurring and triggered report emails via **Notifications**.



Because Info Center connects to your GAGEtrak database, your **User Info Settings** (company name, division name and company logo) and **Report Control ID** text settings (for document control) are all active in Info Center. It also utilizes the same security system as GAGEtrak, so anyone with a GAGEtrak user account can access Info Center.

You can refer to the **Conventions** chapter of this guide for more detailed instruction on creating and saving views and see the **Productivity Tools** chapter for more information about running ad hoc and canned reports.

The **Notification Manger** is also available with Info Center, which can be used to schedule and send reports via emails to designated recipients. See **Notifications** in the **Configuration** chapter of this guide.

CHAPTER 7: CONFIGURATION

The Configuration Menu contains features such as procedure entry and templates, which only require initial setup and occasional updates. For this reason, they have been placed apart from the Main Menu data entry points. These data entry points can also be easily secured from users who will not have access to modify them.

Procedures

Use **Procedures** to specify work instructions for gage calibrations. From here, you import or create procedures and edit them any time, if the procedure has not been previously used in historical records. If a procedure you want to edit has been used in a calibration, GAGEtrak Lite will prompt you to create a new revision of the procedure. Once the new revision is created, you will have the opportunity to link it to all of the gages that will use it in the future. This is a document control measure, to ensure that the historical procedure record is not altered. It is important to note that this data entry point is the only area of GAGEtrak Lite in which your procedure records can be edited or removed.

Gage Templates

If you have several gage families that share the same basic information, such as procedures, schedules, custodians, test points and other characteristic information, you can define a gage template, and then simply select that template for any new gage records you create within that family. In the **Gage Templates** section, you can also update existing gage records that share a template, as well as create a new template from an existing gage record. You can still clone gages in GAGEtrak Lite, but information changes over time and these templates provide you with greater flexibility to update hundreds of records simultaneously and help ensure more consistent data.

Notifications

From the Configuration Menu, select **Notifications**. The Notification Manager opens in a separate program window allowing for access to the features detailed below.

Email Reports

This area allows you to assign any ad hoc or canned report to be emailed to specific recipients. You can either set up a regularly scheduled interval for reports to go out (such as weekly due listings) or a one-time schedule. You can even save view filters for specific reports to ensure that only data for a specific individual will appear on the report. For example, your shift supervisor has requested a gage due listing be sent for all gages currently in his area at the beginning of each week. So you set up a view filter in **Gages** that queries all gages due weekly for either that location or that specific custodian and then create an **Email Report** schedule event to be sent on Monday for each week. You can schedule as many of these schedules as you need and for as many reports as you like; there is no limit.

Auto Cal Due

This area will let you view any of the scheduled notification events currently configured specifically for calibration due listings. These can also be configured via the **Email Reports** configuration, or via the backstage area of the GAGEtrak Lite core application. You can select any current schedule and pause it if needed. Example: A production line is temporarily halted for retooling, or a plant shutdown is coming up, so you do not want email notifications going out during that time, but you would like them to resume when everyone returns. Therefore, you can pause those schedules and then start them back up later.

Formulas

GAGEtrak has included a formula calculator with five predefined formulas. Additional formulas can be added (or cloned) and tested using the calculator provided. Once created, your formulas can be assigned to test points for calibrations. Predefined formulas only work with calibration measurements and once assigned, will automatically convert measurement results; a notification will be displayed near the results indicating a formula was applied.

TRAINING

To save time, avoid common mistakes and get the most out of your software, it is imperative to receive proper training and we offer a wide variety of training options to meet every need and budget.

Completion of comprehensive training entitles each participant to a completion certificate in order to provide proof to an auditor that you've received proper training from the software manufacturer.

Go to https://gagetrak.com/training-schedule/ for details about types of training, schedules and pricing.

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