GAGEtrak® Report Viewer User Guide

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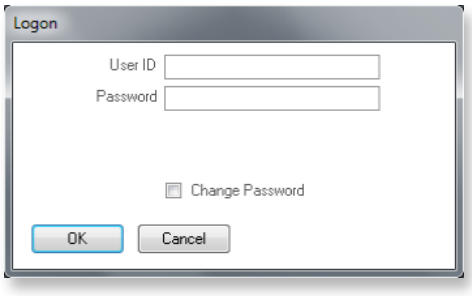
Chapter One
Running GAGEtrak Report Viewer

Launching GAGEtrak Report Viewer

To launch GAGEtrak Report Viewer, double-click the GAGEtrak Report Viewer shortcut icon that was placed on your desktop during installation or click the Windows Start button and navigate to **All Programs -> GAGEtrak Report Viewer** program group **-> GAGEtrak Report Viewer**.

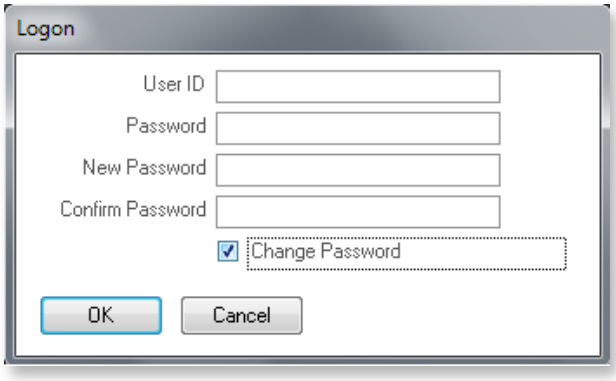
First-time Login

If your main GAGEtrak program requires login, i.e., you use the 21 CFR Part 11 compliant version or you have enabled security, you will be required to log into GAGEtrak Report Viewer. If you do not have login credentials, please contact your GAGEtrak administrator.



Changing Your Password

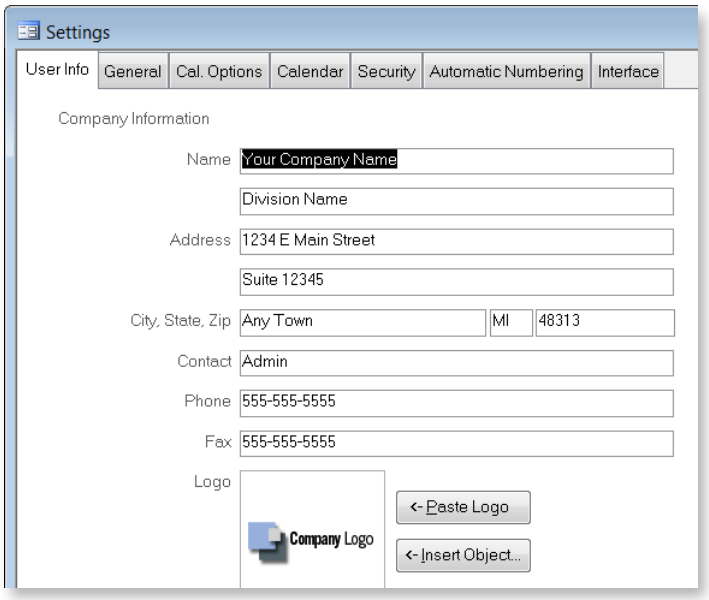
If your main GAGEtrak program is set to require password changes, you will be prompted to change your password in Report Viewer; contact your GAGEtrak administrator for instructions.



Report Viewer Main Menu

Upon successful login, the GAGEtrak Report Viewer main menu will appear:

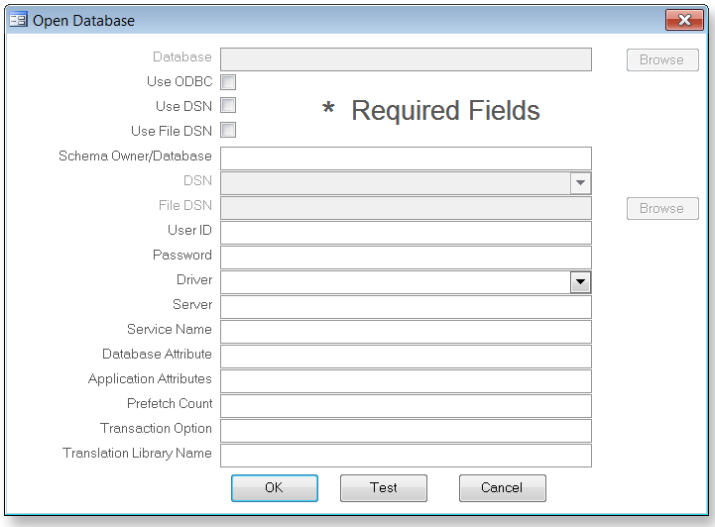
Your Company Name and Your Division Name can be customized within your main GAGEtrak application in the **Setup -> Settings -> User Info** tab. This information appears at the top of the GAGEtrak Report Viewer main menu and on reports.



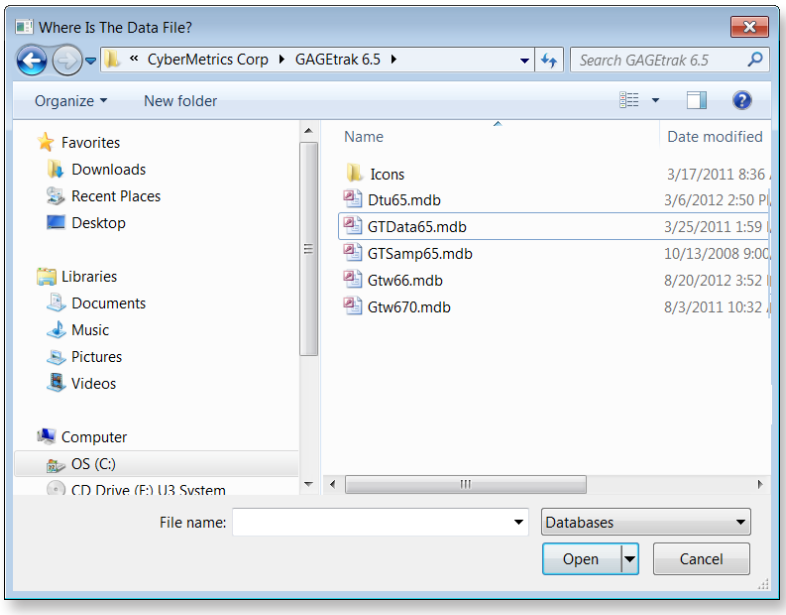
Link to Your GAGEtrak Database

The bottom right corner of the main menu shows the full path to current database file:

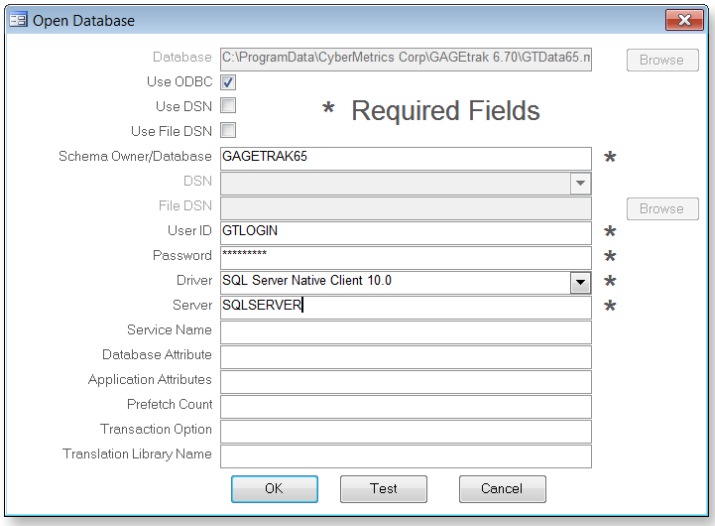
If the program can't find your database file, then the **Open Database** window will appear. If this happens, you'll need to tell GAGEtrak where to find the database file.



If this window appears, click the **Browse** button and navigate through the available drives and directories until you find the database file. The file name will most likely be GTDATA65.MDB.



Select the database file and click **Open**; you are returned to the **Open Database** window. If you have an SQL database, check the **Use ODBC** checkbox and the **Use DSN** checkbox if you created one and enter the information in the required fields. Click **OK**.



Note: Users who have their database file located on the network must have modify permissions in the location where the database resides.

Chapter Two:
Report Filters

Each standard report starts with a filter window that allows you to select a specific group of records for the report. Some reports, such as the Calibration Due Listing report, are time-based, allowing you to specify a date range for selected criteria. All reports are designed using standard Windows True Type fonts.

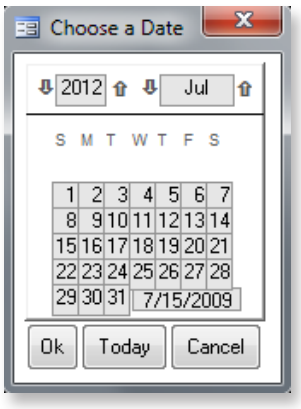
Supported Wildcard Characters in Search Fields

The asterisk (*), question mark (?), number sign (#), exclamation point (!), hyphen (-) and brackets ([ ]) are all wildcard characters. You can use them in report filters to include all records that begin with specific characters or match a certain pattern. Because GAGEtrak Report Viewer allows a literal search on these characters, to find Machine #1, for instance, you would enter Machine [#]1.

Character	If You Enter	GAGEtrak Finds
*	wh*	what, white, and why; works like MS-DOS commands
*	*at	cat, bat, and what
?	b?ll	ball, bell, and bill; ? matches any single character
#	1#3	103, 113, 123; matches any single digit (not for use with date fields—use asterisk (*) instead)
[ ]	b[ae]ll	ball and bell, but not bill; matches any single character within the brackets
!	b[!ae]ll	bill and bull, but not bell; matches any character not in the list between the brackets
-	b[a-c]d	bad, bbd, and bcd; matches any one of a range of characters

Pop-Up Calendar for Date Fields

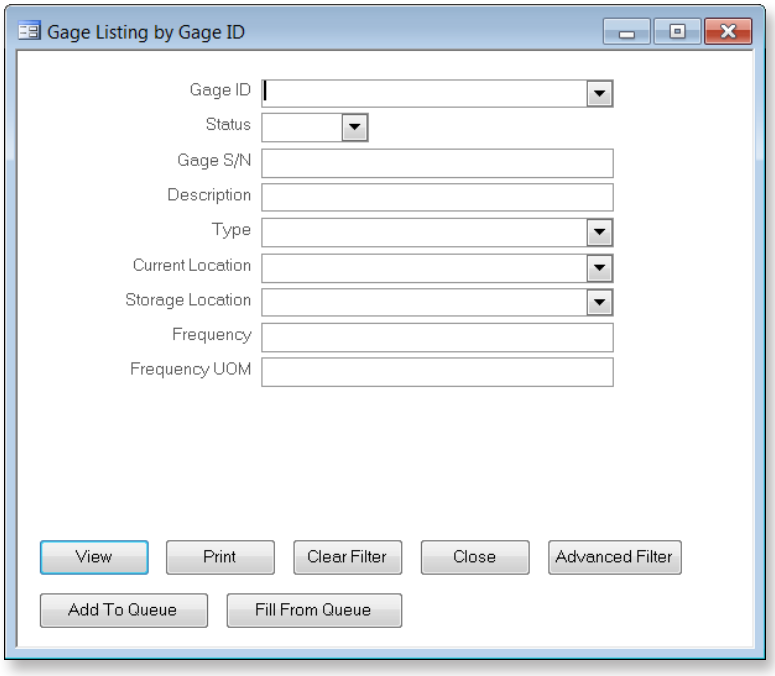
You can enter dates by choosing them from a pop-up calendar instead of manually typing them. When entering information in a filter window, double-click in any date field to view the calendar.



When the calendar first appears, if the date field is blank, then the date on the calendar will be the current date. If there is a date in the field, the calendar will show that date. To select another date, click the up or down arrow buttons to scroll to the desired month and year and then click the day of the month. Click the **Ok** button to accept the date, click the **Cancel** button to close the calendar without selecting a date or click **Today** to enter today's date in the date field.

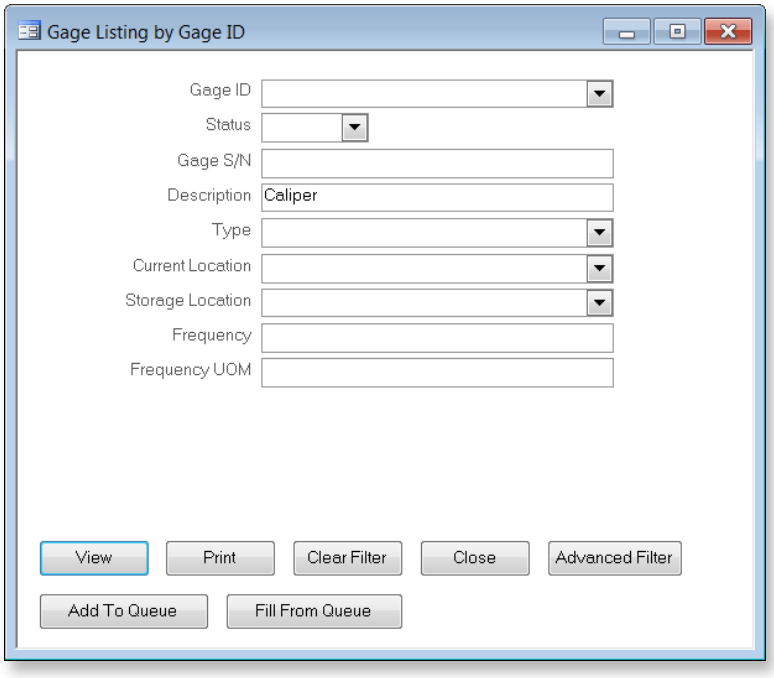
Quick Filter

Some reports will open to a **Quick Filter** window, allowing you to filter the records displayed in the report:

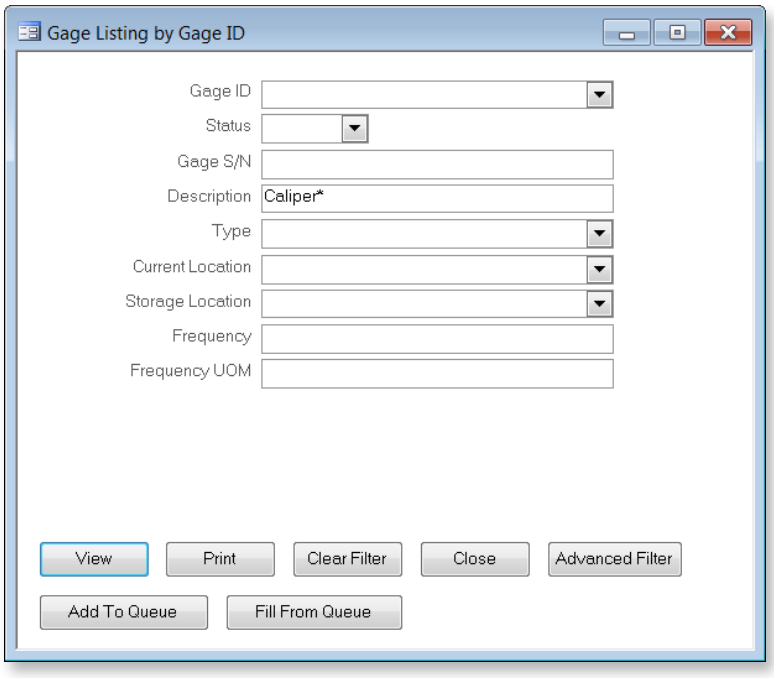


Quick Filter Example

If you want to filter the Gage Listing by Gage ID report by gage records that have descriptions exactly equal to Caliper, enter Caliper in the **Description** field in the report filter:



If you want to limit your report to gage records with descriptions that start with Caliper, such as Caliper 6-inch and Caliper Digital, then enter Caliper* in the **Description** field of the filter. The asterisk (*) is a wildcard character that indicates, in this example, that you want to include all gages that have a description starting with the word Caliper.

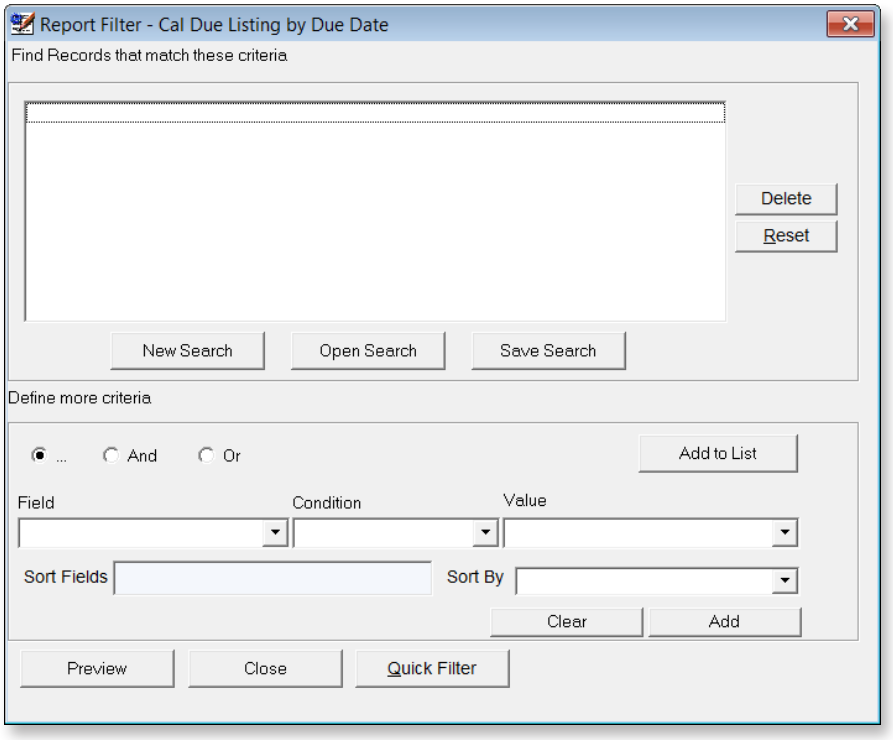


Likewise, if you enter *Caliper, it tells the program that you want all gage records with descriptions ending in the word Caliper, such as 4-inch Caliper. Furthermore, if you enter *Caliper*, it tells the program that you want all gage records with descriptions containing the word Caliper, such as 4-inch Caliper and Caliper Digital.

You can specify as many filter fields as you need, depending on how selective you want to be. After you enter any filter values, click the **View** button to view your filtered report. To remove any filter information, click the **Clear Filter** button.

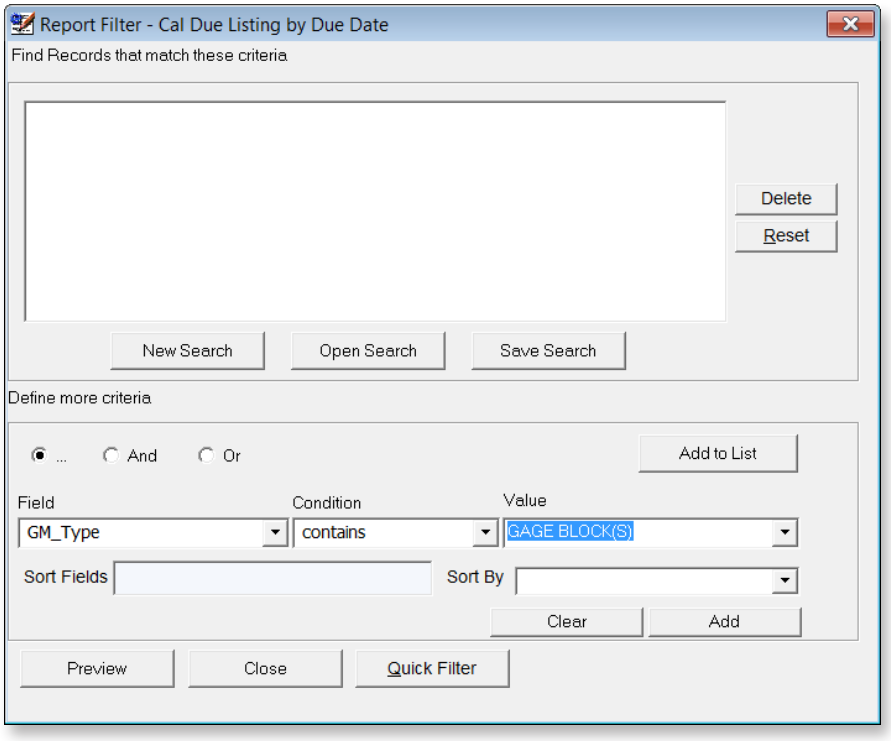
Advanced Filter

Some reports will open to an **Advanced Filter** window. This feature allows you to set up customized search filters for your records, searching by any or all fields in the report. You can even save search criteria so that you don't have to set up the same filter repeatedly. An unlimited number of frequently used searches can be saved and retrieved.

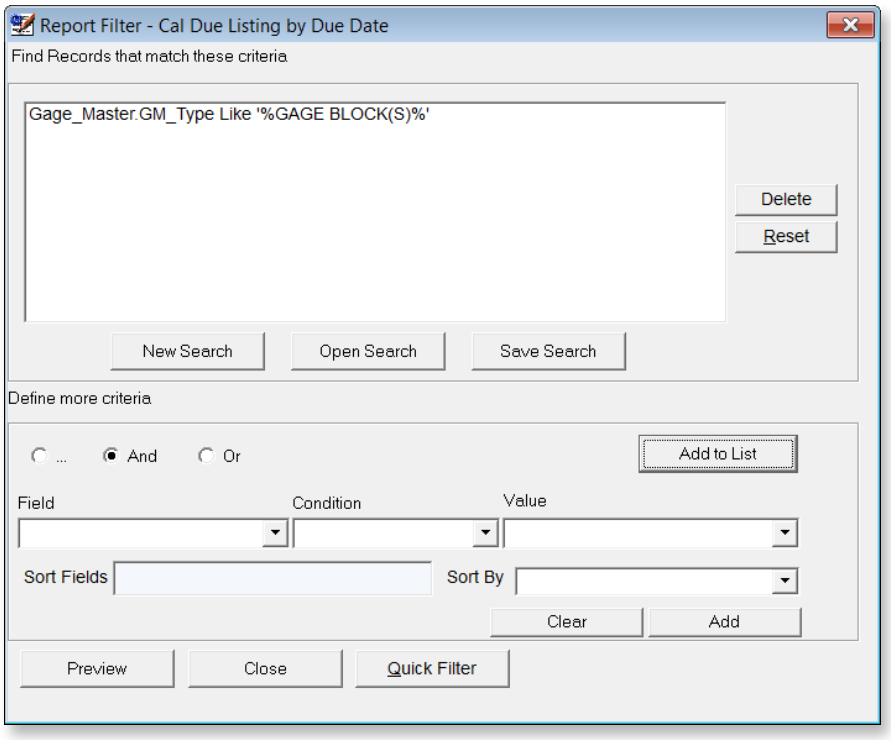


Advanced Filter Example

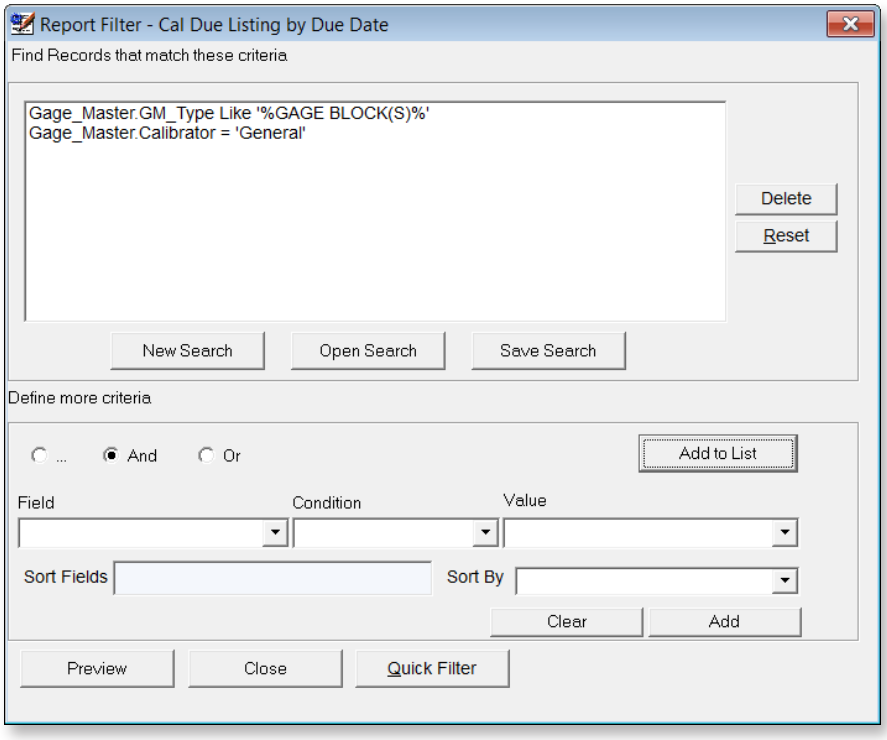
To set up a criterion, select values for the **Field**, **Condition** and **Value** fields (make sure you select the **[...]** radio button for the first criterion):



Click the **Add to List** button. The criterion is then shown in the upper portion of the window:

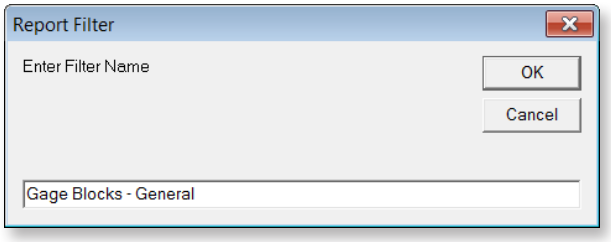


You can add unlimited criteria by selecting the appropriate join condition of **And** or **Or**.



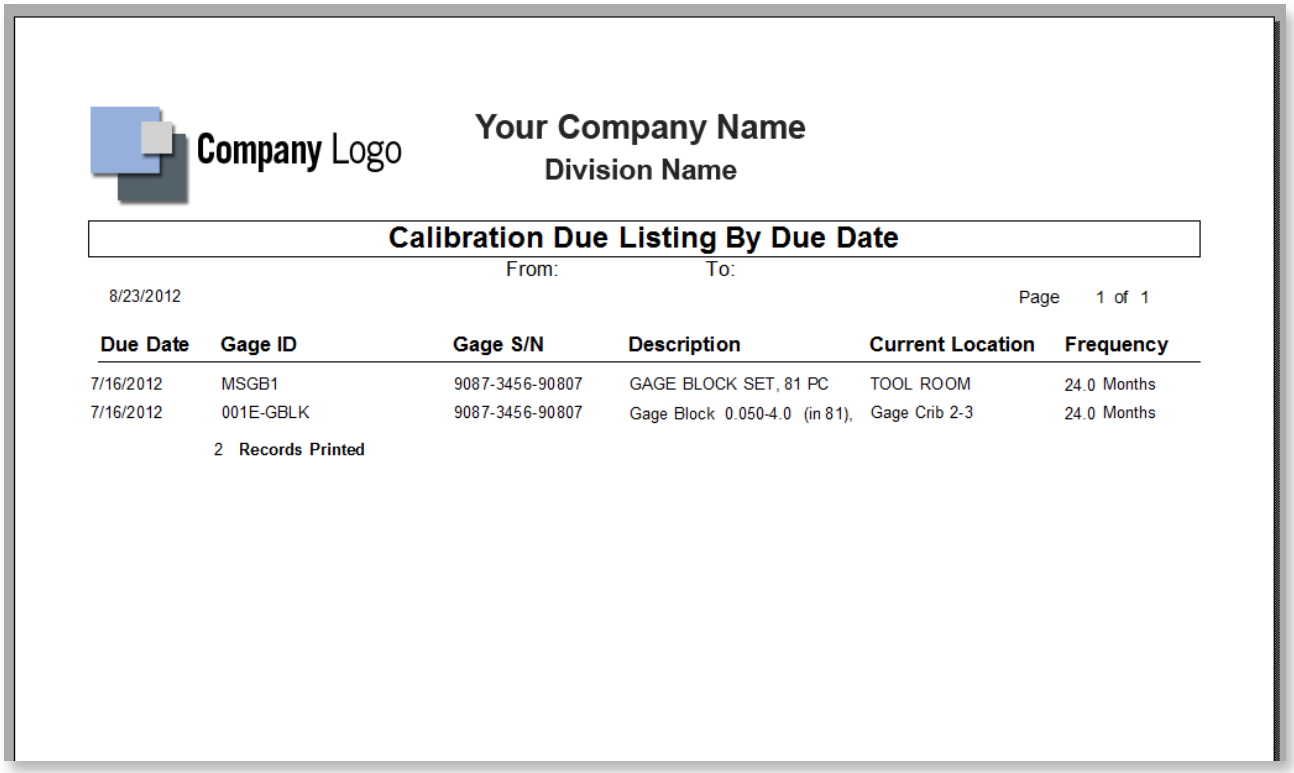
After entering all criteria, click the **Find** button.

You can save your search by clicking the **Save Search** button:

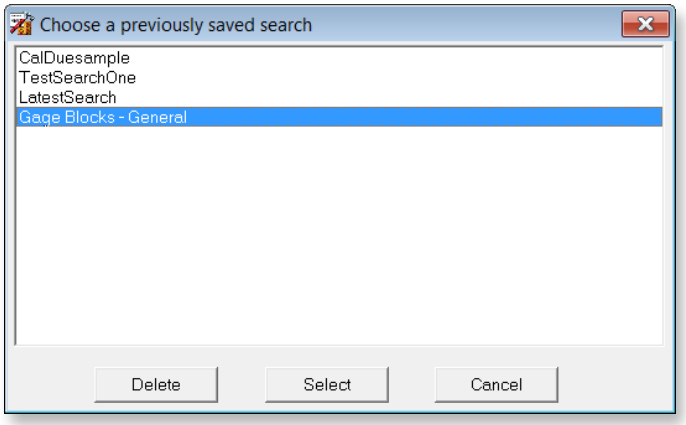


Enter a name for your search and click **OK** to save the search.

Your filtered report will then be displayed:



To access a saved search from within an **Advanced Filter** window, click **Open Search**. A list of your saved searches will be displayed:



Click the name of the search you want to open and click **Select**; your filtered report will be displayed.

Chapter Three:
Reports

GAGEtrak includes a large variety of standard reports. For information on editing these reports and creating new reports, see Customizing Reports in the GAGEtrak User Guide. Creating and saving a custom report in GAGEtrak will make that report accessible from GAGEtrak Report Viewer.

Viewing Reports

You can preview any report by clicking the **View** button in the filter.

Report Preview Toolbar

The report toolbar contains common commands that you can use for reports. Each toolbar button is described below.

Button	Description
Print	To print the current report, click this button. You may also print by using the keyboard shortcut Ctrl-P.
Copy	To copy the current report as formatted text, click this button.
Single Page	To view the current report one page at a time, click this button.
Multiple Page	To view the current report more than one page at a time, click this button.
Zoom Out	To view the current report at a smaller size, click this button.

Zoom In	To view the current report at a larger size, click this button.
100 %	To view the current page at a specific size, use this drop-down list to select a specific percentage value for magnification, or to fit the page into the window.
Send	To e-mail the current report, click this button.

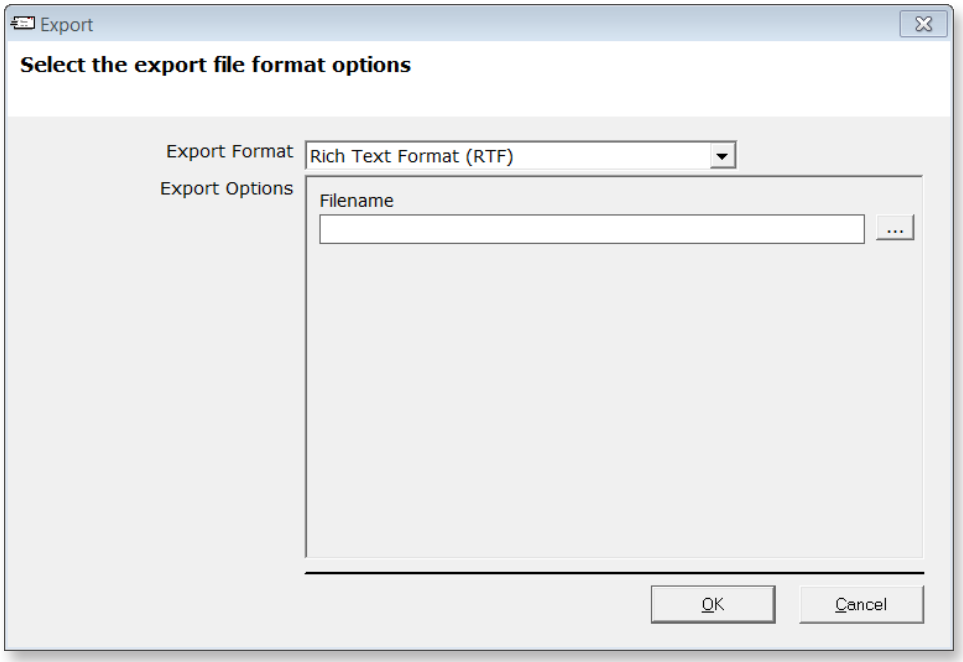
To view different pages in Print Preview use Page 1 of 2 or:

Press	To
Page Down	Move to the next page
End	Move to the last page
Page Up	Go to the previous page
Home	Move to the first page

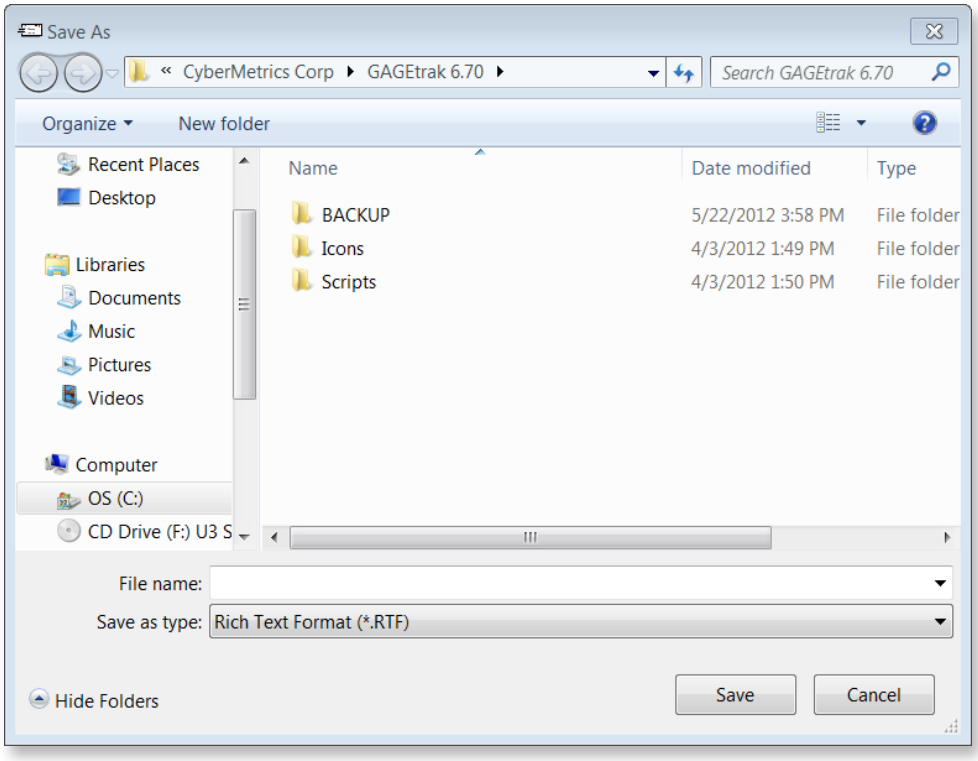
Output To

The **Output To** function in the **File** menu allows you to transmit reports to Rich Text Format (*.rtf), Portable Document Format (*.pdf), HTML (*.htm; *.html), Microsoft Excel (*.xls), Tagged Image Format (*.tif), and MS-DOS Text (*.txt). If you save a file in .rtf format and then open that file in a word processing application, such as Microsoft Word, your data will have the appearance and formatting of the report that you exported. If you output to a text file, all of the data will be present, but the formatting will be lost. Outputting to an Excel spreadsheet is the best option to select when you wish to export a report. Choose Portable Document Format to create a report that appears identical to the report you see in GAGEtrak Report Viewer; others will be able to print (but not edit) this report even if they do not have GAGEtrak, as long as they have the free Adobe Reader.

The following is an example of the Export Format and Export Options selections for reports:

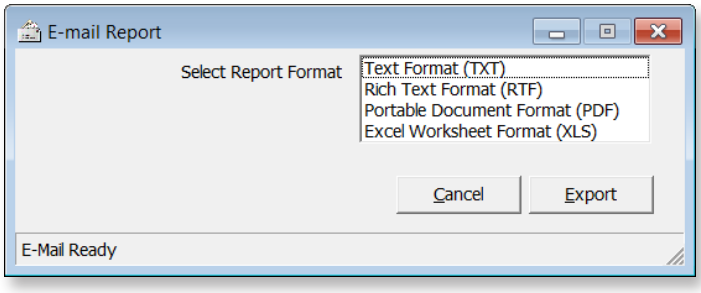


Click the **[...]** button in the **Export Options** section to select a save location:



Send

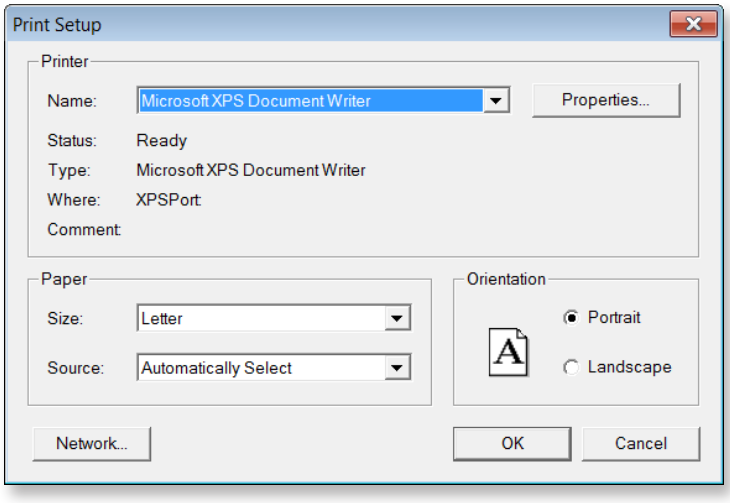
The **Send** command from the **File** menu allows you to output reports to Microsoft Outlook (or any MAPI compatible mail program). The output includes subforms and subreports. The file format and appearances are as shown here:



Print Setup

Select **Print Setup** from the **File** menu if you want to change report print settings, such as printer selections, paper size and source or report orientation (portrait or landscape). For more information on how to set up page characteristics, refer to Report Settings in the GAGEtrak User Guide.

The type of printer driver installed controls some options, but a typical setup window looks like this:



Tip: To save paper and time, first view the report on-screen and then adjust the print setup values. Any changes will be visible on-screen after you click the OK button. When you close the report window, the program will save the new settings.

Report Descriptions

This table contains a description of the most commonly used reports, including special filtering options.

REPORT QUEUE	This feature allows users to Save, View, Print and Print All commonly used report filter criteria. Once you have a report filter set up as required, simply add the filter criteria to the queue. These saved filters can be retrieved at a later date, or printed directly from the reports queue. Users can save multiple sets of criteria for each report; report criteria may be fixed dates such as January 1, 2012, or variable dates such as "30 days before the current date." Report Queue allows several reports to be printed consecutively.

GAGE REPORTS	
Report	**Description**
Gage Bar Code Labels	Use any of these reports to print a pre-designed bar code or group of bar code labels. Make sure that the label height matches the cartridge installed on your label printer
Gage Detail Report	Use this report to see a comprehensive gage report, including record details.
Gage Issue History Report	For a complete list of gage issue history, use this report.
Gage Labels	Use any of these reports to print a pre-designed label. Make sure the right printer cartridge is installed before selecting the print button.
Gage Listing by…	Select a report "by" specific report for viewing / printing specific information.

OPEN CALIBRATION REPORTS	
Report	**Description**
Calibration Due Listing by…	Select a report "by" specific report for viewing / printing specific Calibration Due Listing information. You can sort the list by several different fields, such as Gage ID. Important: The Calibration Due Listing report lists only gages that you assigned as Active (status ID 1) in Gage Entry. Also, reports with a calibration frequency of Usage or Cycles that are not past due for calibration will present an asterisks " * " to the right the Next Due Date denoting the date as an Estimated Due Date.
Calibration Schedule by…	Select a report "by" specific report for viewing / printing specific Calibration Schedule information. If you have a large gage inventory with a variety of calibration frequencies, it's difficult to plan your workload. This powerful report makes this task easier by helping you predict calibrations that are due during a specific time frame. It builds a temporary schedule for each gage and then summarizes the findings, taking your skip days/dates into account. Use this report as a labor and cost-planning tool. After you enter any filter values, click View to view the schedule. Tip: Don't use too wide of a date range, such as a 10-year span, as it can take a long time to generate. If the schedule takes too long, press CTRL-BREAK to stop it, then try a smaller date range. Schedule report options include: Include days with no activity—If you want your report to include complete time frames, check this box to include days on which calibrations aren't scheduled. For example, suppose you wanted to create a schedule for January through March, and no calibrations were due in February. If you left this box un-checked, your report would show January and March, but not February. If you checked this box, the report would include February. Default Hours—GAGEtrak uses this value for gages that don't have an estimated calibration length (i.e., their Calibration Hours fields are blank). For example, if you enter 0.5, GAGEtrak assigns a half-hour of time only to those gages. If you entered Calibration Hours for your gages, leave this field blank. Schedule Type—Use this field to select how to summarize your schedule–by day, week, month, quarter, or year. Select By Day With Details for a comprehensive listing. Tip: You can print more than one schedule type without having to re-generate the schedule each time.
Calibration Work Order	Use these forms to gather calibration data and document work assignments for your personnel.

CALIBRATION HISTORY REPORTS	
Report	**Description**
Certificate of Calibration	Calibration certificates prove that you've performed the proper calibrations and that the procedures used meet/exceed certain minimum requirements. GAGEtrak retrieves the certificate information from Calibration Entry. You can update only three fields in the report screen: Customer Information, Statement, and Uncertainty Format. If you need to add or edit other information, go to Calibration Entry. Customer Information—Enter what you want to print on the certificate. This might include the customer's company name, contact name, address, telephone number, or other important information. Statement—You can edit the calibration statement for each certificate. Any changes you make to the calibration statement apply only to that record. If you want to change all future calibration statements, go to Settings—Calibration Options (see the System Administrator's Guide). Uncertainty Format—Use the dropdown list box to select the number format for the sum of uncertainty standards that you used to calibrate the gage. You can view or print certificates for the most recent calibration or for all calibrations by using the View/Print Current or View/Print All buttons at the bottom of the window. The Quick Filter or Advanced Filter can be used to select the certificates to print.
Calibration Costs and Labor Report	Use this report to track your calibration costs for each gage, department, location, account number, calibrator, or other criteria.
Calibration Labels (Batch)	You must have the optional Calibration Label Kit to print labels. You can print a batch of calibration labels based upon the calibration date, gage ID, location, or description for any existing calibration records. Tip: Use this report to print your calibration labels at the end of the day in one batch. This method eliminates the blank waste tape that prints for each label you print from Calibration Entry. You'll still get an initial piece of waste tape, but after that, the printer adjacently ejects and cuts your labels. To preview a label, check the Preview box and click the label button. To print a label, clear the Preview box, then click the label button. Be sure to install the appropriate label tape in your printer.
Calibration History	To see a list of calibration history, select this report. Enter the dates for the time frame in question along with any other filters. Check the Calibration Meas. box to include the table of calibration measurements used for each calibration.
Standards Traceability Report	Use this report to provide traceability for your calibration and reference standards.

PART REPORTS	
Report	**Description**
Gage Requirements by Part	This report prints gage requirement sheets.
Part Bar Code Labels	Use these reports to print part bar code labels.
Part Listing	These reports list parts, including descriptions and uses.

R&R REPORTS	
Report	**Description**
R&R Due Listing by…	Select a report "by" specific report for viewing / printing specific R&R Due Listing information. These reports list gages that are due for R&R studies. Reports for each R&R study may be printed from Gage R&R.

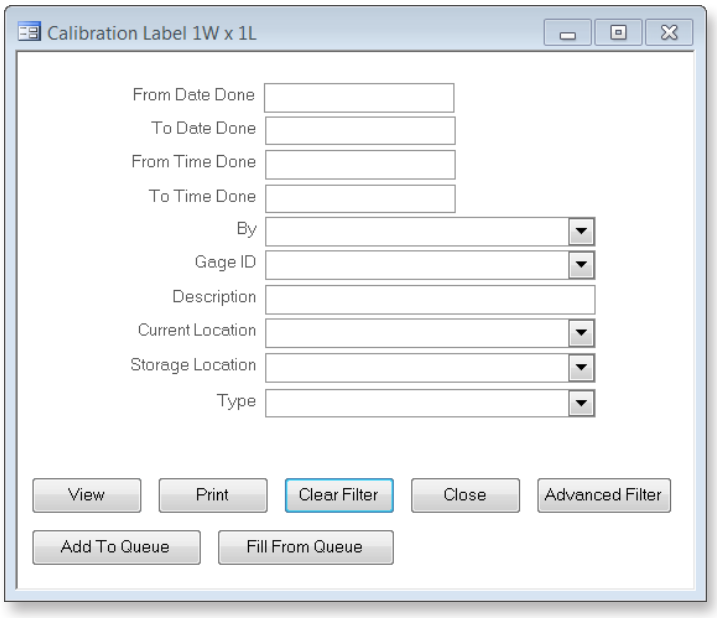
MISCELLANEOUS REPORTS	
Report	**Description**
Audit Log Detail	Lists all user activity, including audit ID, date / time, user, object action, data key and field old and new values.
Supplier Listing	This report lists your suppliers. Check Enabled to see only active suppliers. To see both active and inactive suppliers, uncheck Enabled.
Procedure Listing	To see a list of calibration procedures, choose this report. Check the Summary Listing By Gage ID box to include the gages linked to each procedure.
Corrective Action/ Service Requests	Use this report for a list of open or closed corrective action or service requests. For each request, the report lists the date, supplier, requester, gage ID, type of request, and status.
Group Permissions and Users	This report prints a complete listing of group permissions and users and their access permission on the forms, reports and controls of the program. Access to this and all other reports can be limited through Security.
MSA Summary Report	At a glance – MSA V2 and MSA V3 study type totals.

STAFF REPORTS	
Report	**Description**
Gage Authorized Users	This report lists your suppliers. Check Enabled to see only active suppliers. To see both active and inactive suppliers, uncheck Enabled.

KITTING REPORTS	
Report	**Description**
Kit Listing	Lists all kits or one specified kit, and each kit's associated Required Gage Types and Required Gage information.

Printing Labels from the Calibration Labels Report

To print labels in a batch, go to the main menu and click **Calibration History Reports, Gage Reports, Open Calibration Reports** or **Part Reports**. A list of reports will appear beneath the report group; click the **Label** report that corresponds with the label size you wish to print. A filter window similar to the one below will appear:



You can use this window to filter for a group of labels based upon Calibration Date, Gage ID, Location, Description, etc. for any record that exists in the database.

Below are brief descriptions of the fields and buttons in this window:

Field/Button Name	Description
From and To Date Done	Inclusive calibration dates.
From and To Time Done	Inclusive calibration times.
By	Name of calibrator.
Gage ID	ID of specific gage. This will limit your label to one—for the specific gage ID only.
Description	Enter a description for the gage.
Current Location	The current location of the set of gages to be selected.
Storage Location	The storage location of the set of gages to be selected.
Type	The type of the set of gages to be selected
View Button	To see how your label will appear before you print it, click on this button.
Print Button	Prints labels
Clear Filter Button	Clears all filter entries
Close Button	Aborts label printing and goes back to the Custom Label Menu
Advanced Filter Button	Use this button to open the Advanced Filter window. You can then filter for a group of records that match the criteria you enter. You can also open previously saved criteria for use and create and save new criteria.
Add to Queue Button	Add filter file to printing queue. You can view and print the file from the Report Queue.

Fill From Queue Button	Copy filter information from a saved file in the Report Queue.

Viewing and Printing Labels

When you have finished entering your filter parameters, click the **View** button to see a preview of your label. Make sure that the height of the tape cartridge in your label printer matches the height of the label you have selected and then click the **Print** button to print your labels.

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