# Report Viewer

Desktop Reporting for use with GAGEtrak 7.0.5

# User Guide

CyberMetrics®

# Report Viewer

Desktop Reporting for use with GAGEtrak 7.0.5

# User Guide

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# Chapter One
# Overview

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

Report Viewer connects to your GAGEtrak database (version 7.x) allowing you to access all standard GAGEtrak reports as well as any edited or custom reports that were created within GAGEtrak; reports can be viewed on-screen, printed or emailed. You can also print durable, laminated labels from Report Viewer with the Calibration Label Kit.

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

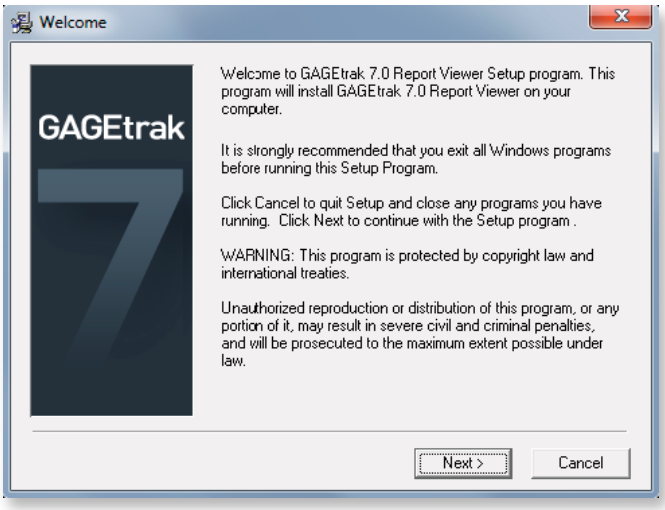
Report Viewer offers the convenience and simplicity of accessing only the information you need, allowing you to have more control over your quality management program.

# Chapter Two
# Installation

We recommend that you install the software under the Windows user profile that will be utilizing the software. The setup will prompt you for administrative credentials to complete the installation. The root directory of the supplied media contains all the files required to install GAGEtrak Report Viewer.

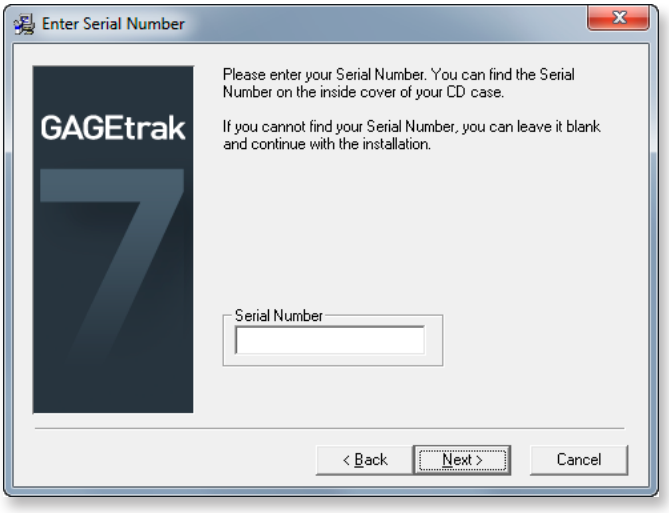
**Do not install Report Viewer on a PC that has GAGEtrak installed.** Report Viewer is only for those who do not need access to the full functionality of GAGEtrak.

1. Upon launching the installation file, the **Welcome** screen will appear:

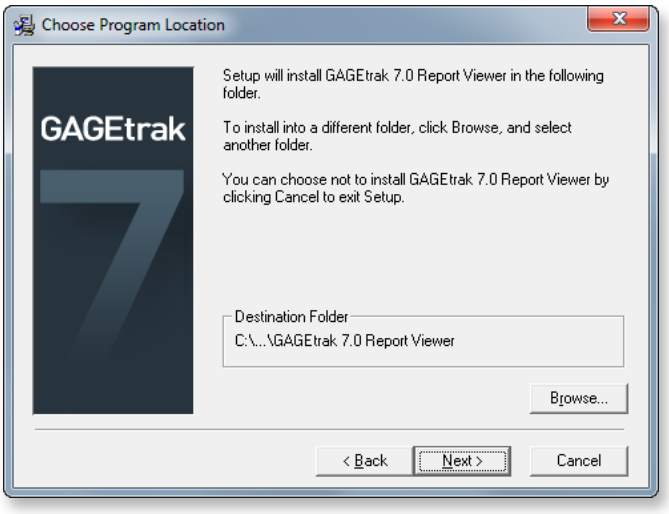



Close any other Windows programs that are running and click **Next**.

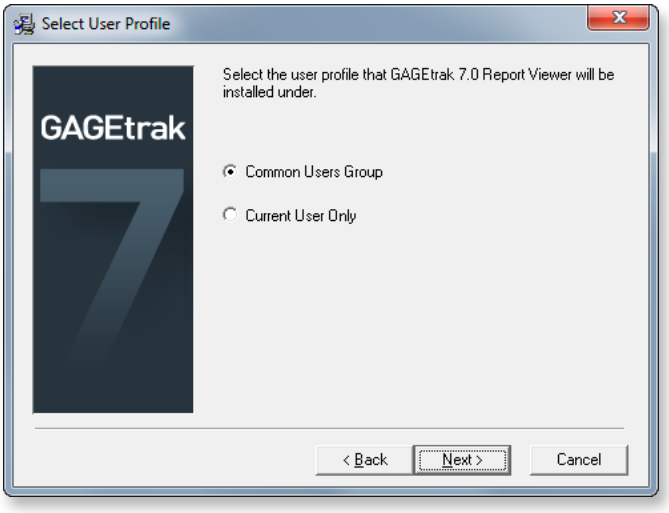
2. Now, enter the **Serial Number** of your software; this number can be found within your product packaging. If you are using the software only as a trial version, you may leave this field empty for now and just click **Next**.



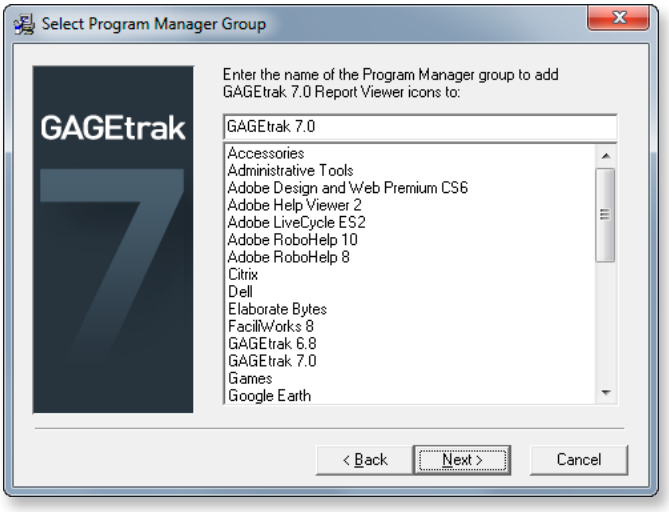

3. Now you will choose the location for the program on your hard drive. Since this location is specific to each workstation, do not select a network location. We recommend using the default directory, C:\ProgramData\CyberMetrics Corporation\GAGEtrak 7.0 Report Viewer. After selection, click **Next**.



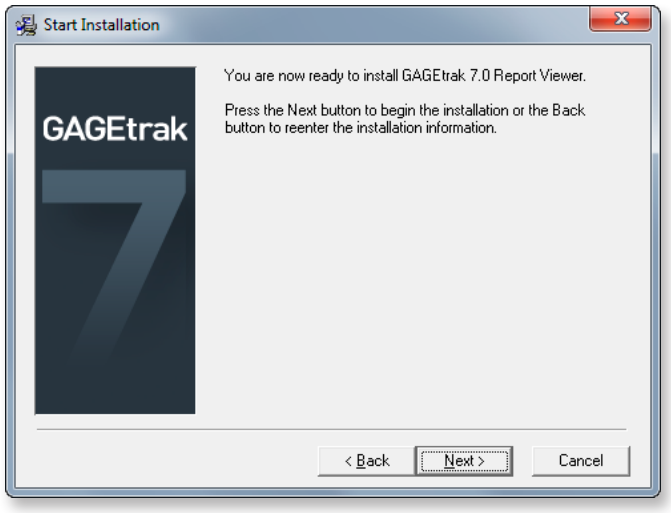
4. In the **Select User Profile** window, select **Common Users Group** to make Report Viewer accessible to all users of the workstation. If you want only the current user to be able to access Report Viewer, select **Current User Only**. Click **Next**.



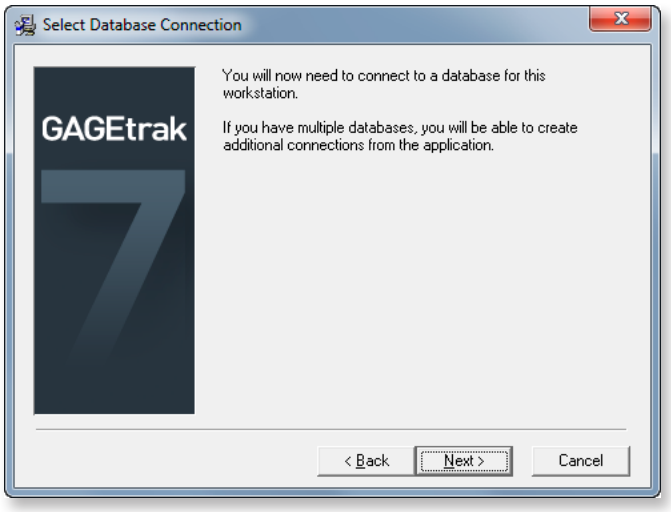

5. In this screen, you can enter a new program group name, though we recommend keeping the default, GAGEtrak 7.0; click **Next**.



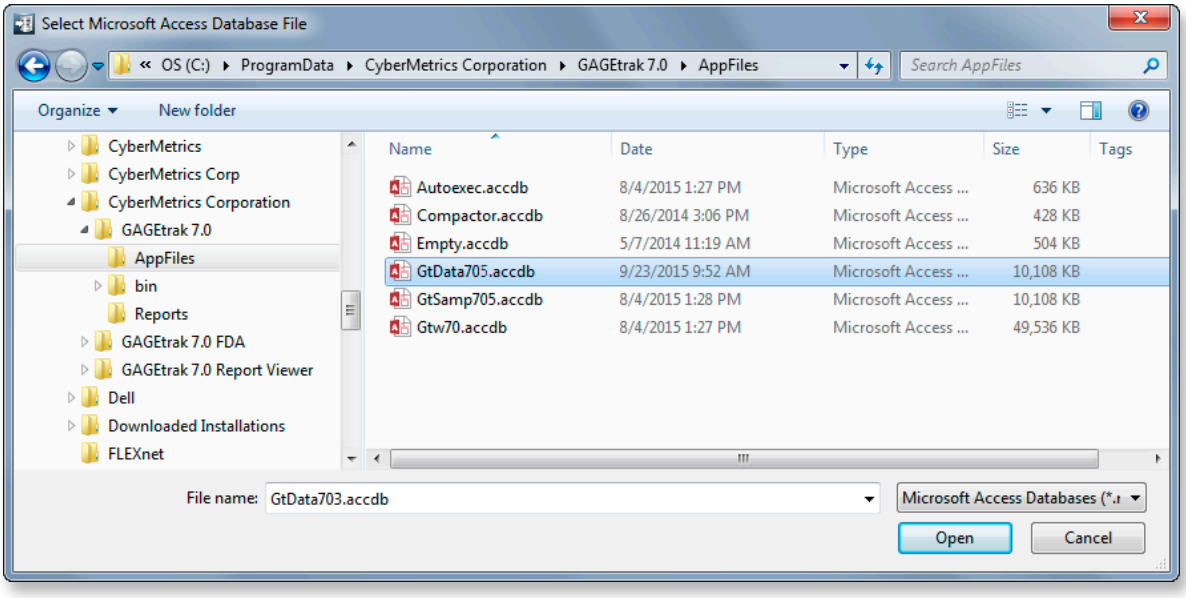
6. You are now ready to install GAGEtrak Report Viewer; click **Next**.



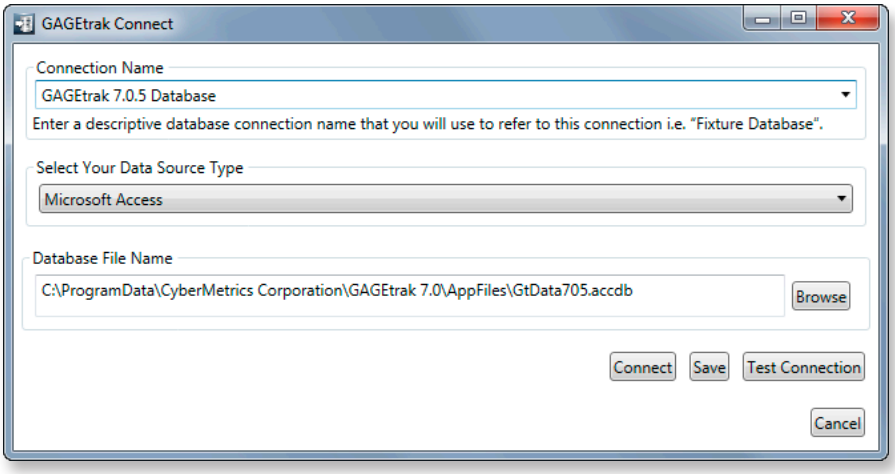

7. When you see the screen below, click **Next**.



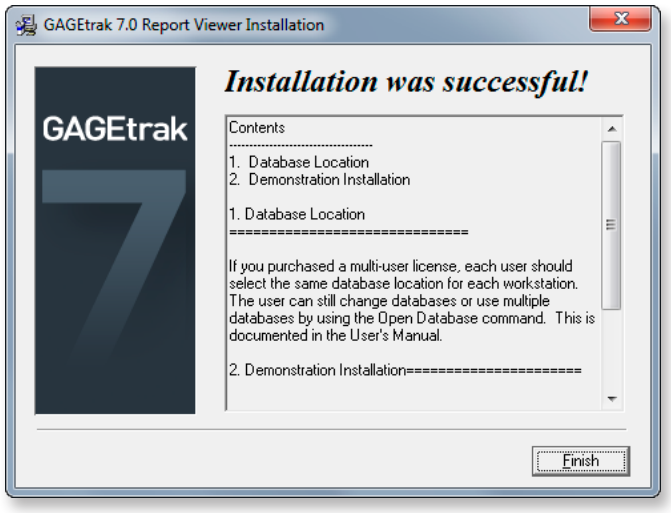
8. In the ensuing **GAGEtrak Connect** window, click the **Browse** button. This will open the **Select Microsoft Access Database File** window. Locate and select your GAGEtrak 7.0.4 database:




9. Your database location is now displayed in the **GAGEtrak Connect** window; enter a **Connection Name** and then click **Save**.



10. Successful installation of Report Viewer will be confirmed; click **Finish** to exit the installer.

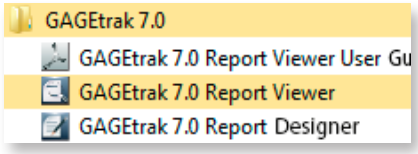


# Chapter Three
# Running GAGEtrak Report Viewer

Once you have installed GAGEtrak Report Viewer, it's time to launch it.

## Launch GAGEtrak Report Viewer

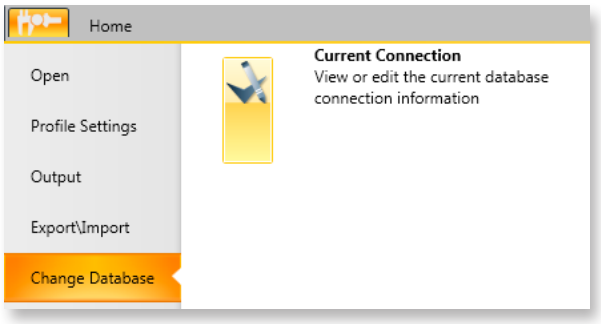
To launch GAGEtrak Report Viewer, double-click on the shortcut icon that was placed on your desktop during installation or click the Windows Start button and navigate to **All Programs -> GAGEtrak 7.0 program group -> GAGEtrak 7.0 Report Viewer**.



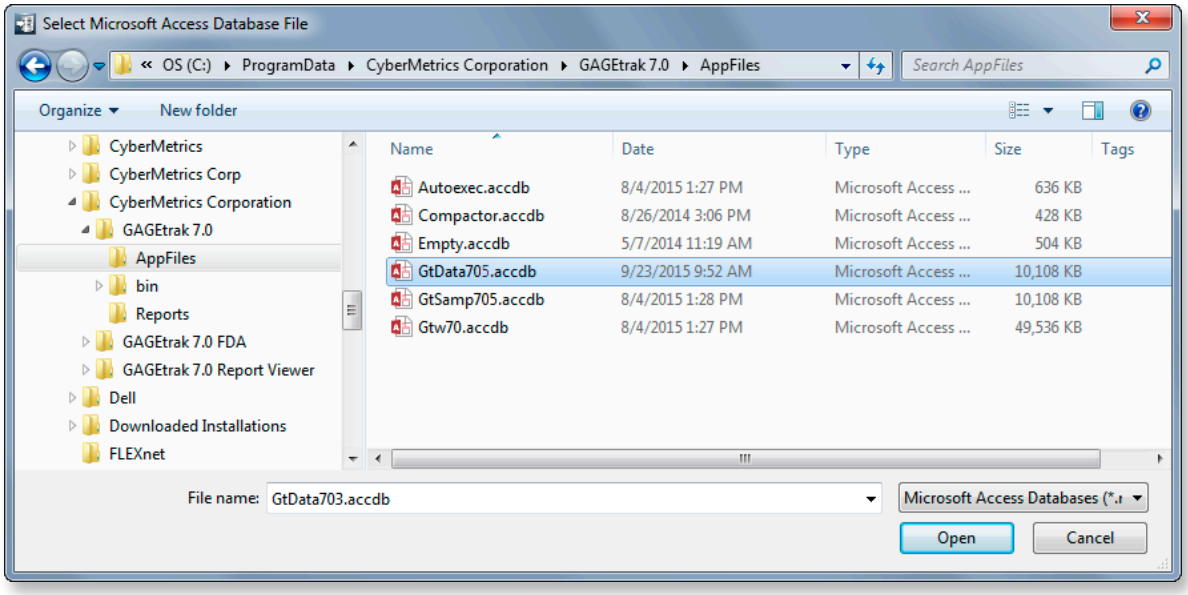
# Connect to Your GAGEtrak Database

If you did not connect to your database during installation, follow the instructions in this section. If you have already connected to the database, skip to the Login section on the next page.

Within Report Viewer, click the application icon in the upper left corner, select **Change Database** and then click the **Current Connection** icon:

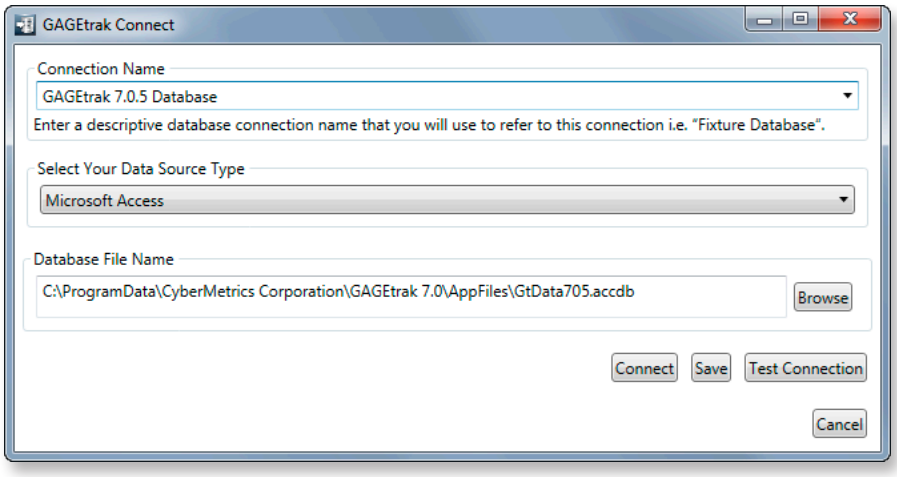



Browse to your GAGEtrak 7.0.5 database:




Click **Open**.

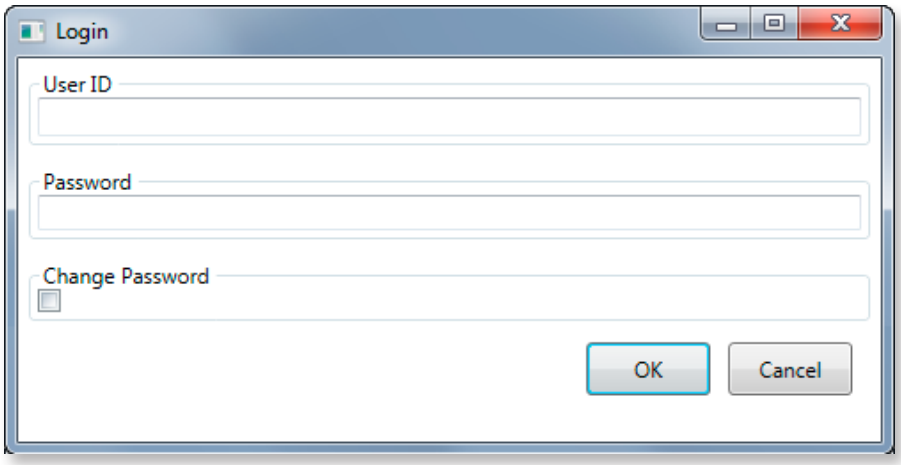
Back on the **Database Connection** screen in Report Viewer, the file path to your GAGEtrak database is displayed:




Click **Save**.

# Login

Now that you have connected to your GAGEtrak database, if security is active in GAGEtrak (via **Settings -> Security**), Report Viewer will require login; the **Login** window shown below will appear:

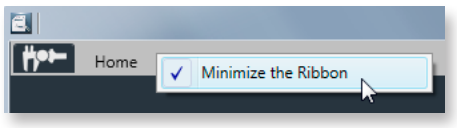



Enter your **User ID** and **Password** from GAGEtrak and click **OK**.

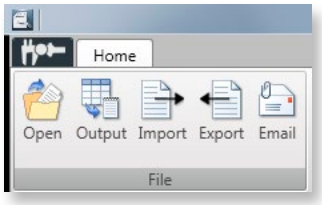
# Chapter Four
# Program Conventions

## The Ribbon

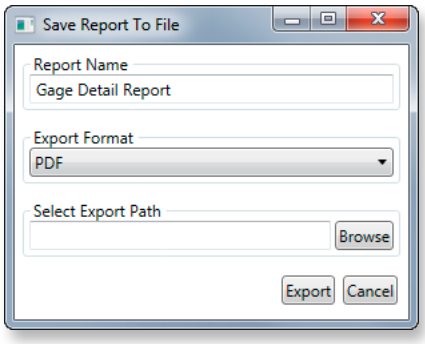
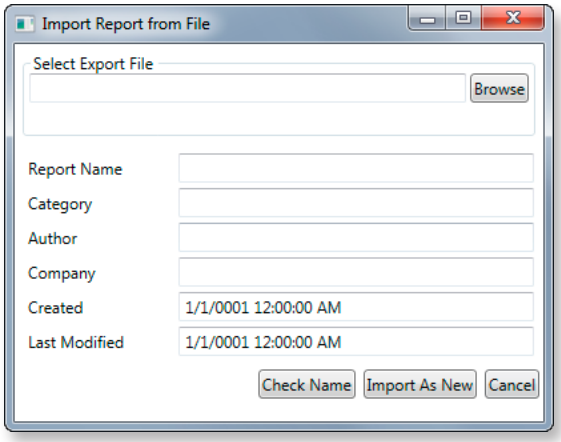
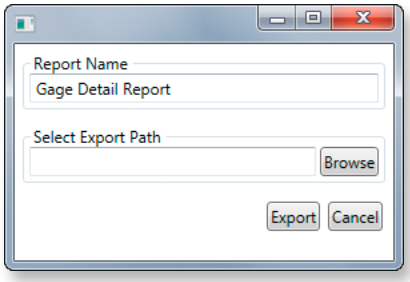
Access program functions from the toolbar called the Ribbon. By default, the toolbar is minimized. Right-click the grey bar toward the top of the application window and deselect **Minimize the Ribbon**:




This makes the ribbon visible:

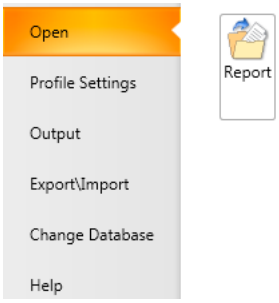
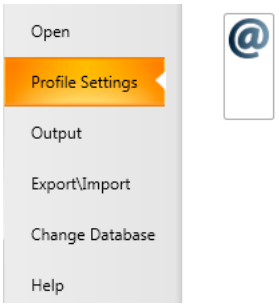
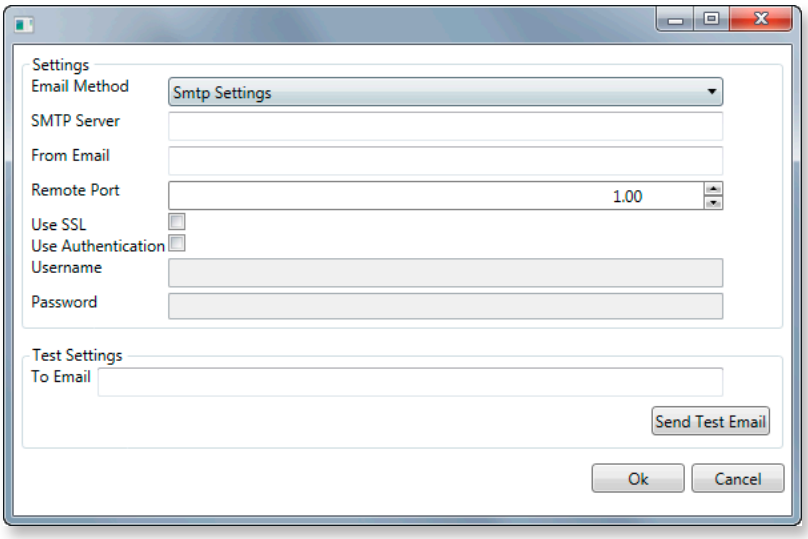


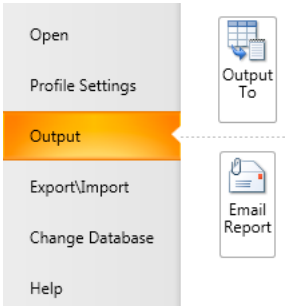

To hide the ribbon, right-click the grey bar again and click **Minimize the Ribbon**.

| Icon | Function |
|---|---|
| | Open a report; clicking this button displays the Report Selector window. |
| | Output the report to a file or send the report via email. If you select Output Report to, the following window opens to specify file format and path:<br>  |
| | Import GAGEtrak reports from other versions of GAGEtrak or other GAGEtrak databases.<br>  |
| | Export reports to be used by other GAGEtrak databases.<br>  |
| | This option allows you to send selected data via email in a variety of file types. The output includes sub-forms and sub-reports. The file format and appearances are the same as those described above for the Output commands. |

# Application Icon

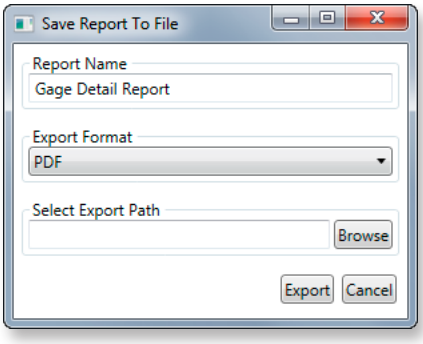
Click the application icon in the upper left corner of the Report Viewer window for a menu of options; most of these options are also available from the Ribbon.

| Option | Description |
|---|---|
|  | Open a report; clicking the **Report** icon displays the **Report Selector** window. |
|  | Click the **Email Settings** icon; in the **Email Settings** window, enter the following information:<br><br>Email Method – select protocol for sending email between servers<br><br>SMTP Server – insert name of server<br><br>From Email – insert your email address<br><br>Remote Port – check with your System Administrator for an acceptable port number<br><br>Use Authentication – this is the process of identifying an individual, usually based on a User Name and Password<br><br>Test Settings to Email – performs validity of information entered in email setup; enter an email address and then click the Send Test Email button.<br><br>  <br><br>Once your settings are complete, click **OK** to save the settings and close the window. |




## OUTPUT TO

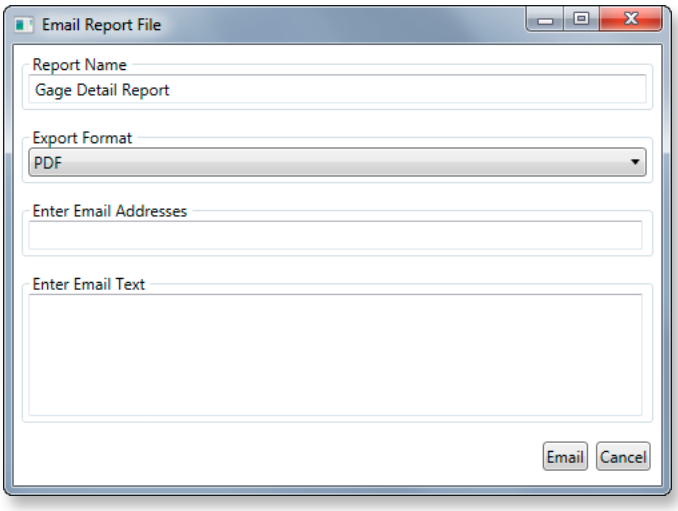
If you select **Output To,** the following window opens to specify file format and path:



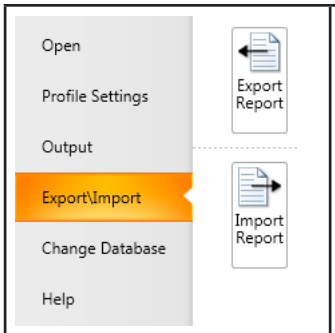

The **Output To** command allows you to transmit reports to Rich Text Format (*.rtf), Portable Document Format (*.pdf), Microsoft Excel (*.xls) and Tagged Image Format (*.tif). If you save a file in .rtf format and then open that file in a word processing application, such as Microsoft Word, your data will have the appearance and formatting of the GAGEtrak report that you exported. Output 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; 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.

## EMAIL REPORT

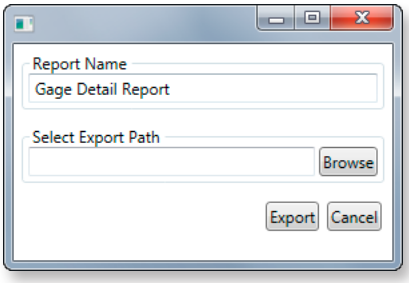
Selecting **Email Report** will open this window, allowing you to specify file format and email text:

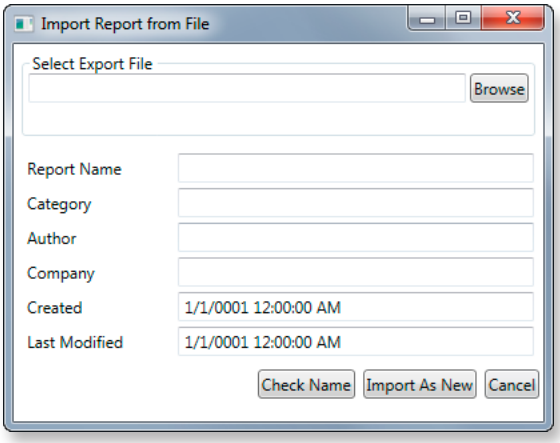


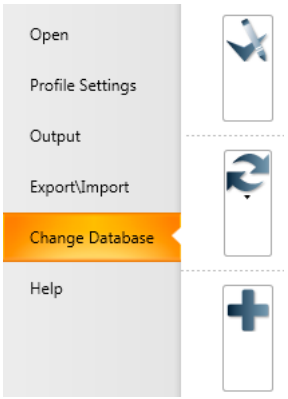

Staff email addresses will appear in the drop-down list in the **Enter Email Addresses** field. Select multiple addresses from the list or manually enter addresses; multiples must be separated by a semicolon.




Export or Import GAGEtrak reports from other versions of GAGEtrak or other GAGEtrak databases.

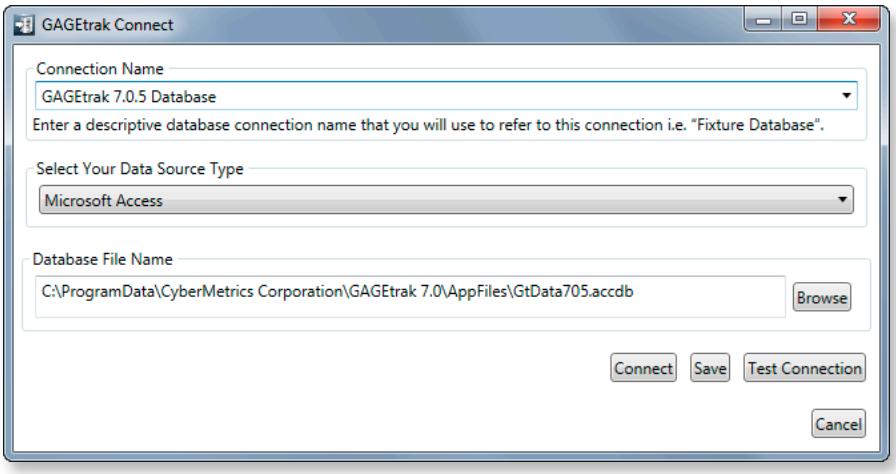




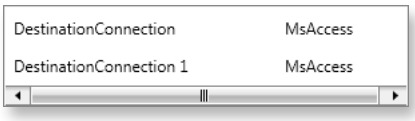

## CURRENT CONNECTION

Click the **Current Connection** icon to view or edit the current database connection information. After filling out the necessary information, click **Save**.




## SAVED CONNECTIONS

This icon is only visible after having created a new connection. When multiple connections exist, click the tiny arrow at the bottom of the **Saved Connections** icon to display a list of saved connections:




Select the desired connection; the **GAGEtrak Connect** window will open, allowing you to connect to, edit or delete the connection.

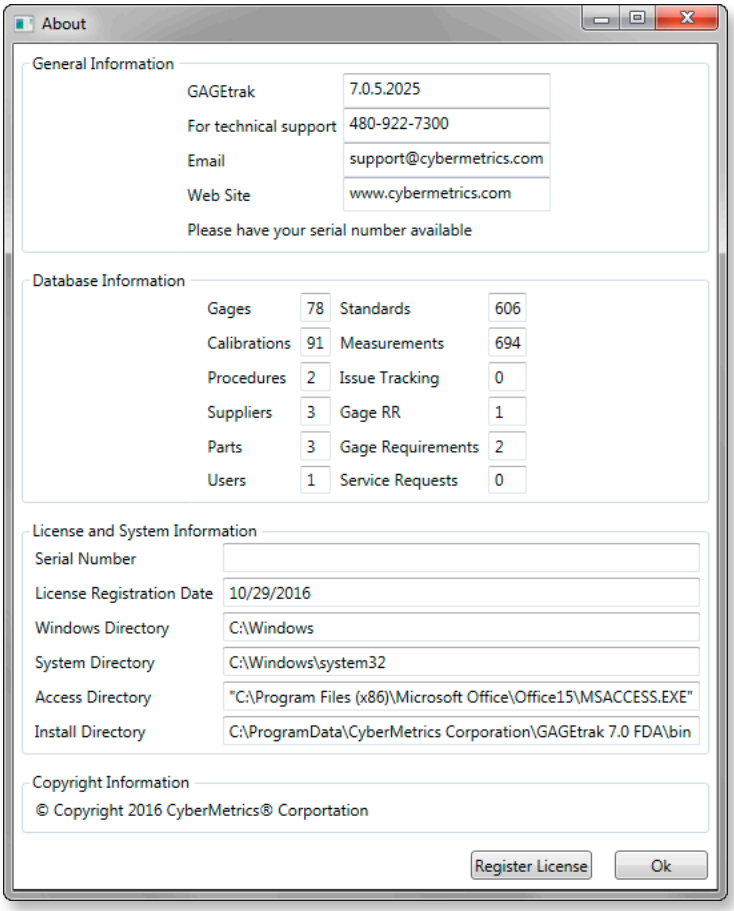
## NEW CONNECTION

GAGEtrak provides an enhanced data connection tool that allows you to save and edit several connections (to utilize multiple databases), making it much simpler to connect to another GAGEtrak data source without having to re-enter the connection information. Click the **New Connection** icon to create and save a new database connection. After filling out the necessary information, click **Save**.

To switch back and forth between multiple saved connections, you would go to **Saved Connections** to select the desired database. If you are connecting to a GAGEtrak database that has security enabled, you will need to log in with your User ID and Password associated with that database.

## ABOUT

Open the **About** window to see general, database, license and system information:

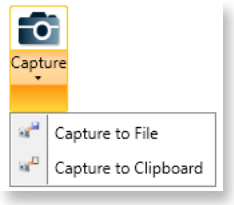



## HELP

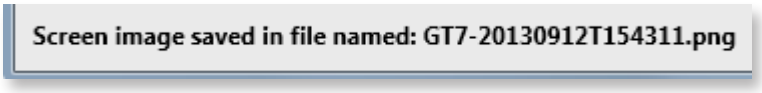
Click Help to view Report Viewer's Help System. The Help System can be browsed by the table of contents or index or a broad search can be done. The contents of the Help System are identical to that of the User Guide PDF file.

**CAPTURE**

Click the tiny arrow at the bottom of the **Capture** icon; two options are displayed.



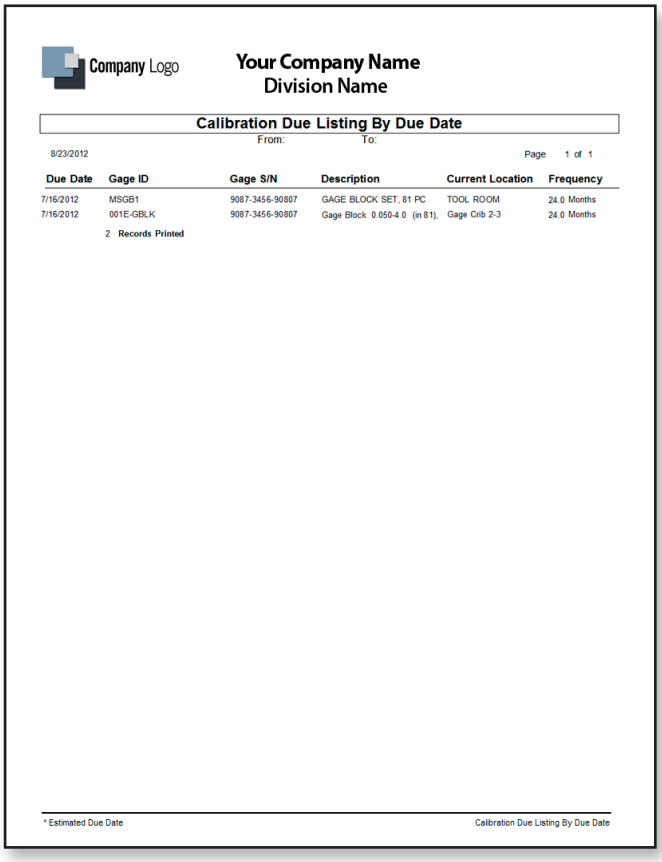

**Capture to File**: Clicking this option will take a screen shot of the current Report Viewer window and save it to a file in Bin folder of the Report Viewer installation files. The default file path is: C:/ProgramData/CyberMetrics Corporation/GAGEtrak 7.0 Report Viewer/bin. The file name of the screen shot is shown in the bottom left corner of the Report Viewer widow after the screen shot is taken:




**Capture to Clipboard**: Clicking this option copies the current Report Viewer window to the Windows clipboard, allowing you to paste (Ctrl V) the image into, for instance, an email or a Word document.

# Chapter Five
## GAGEtrak Settings

Because Report Viewer connects directly to your GAGEtrak database, your **User Info** settings including company name, division name and company logo and your **Report Control ID** text settings (for document control) are all active in Report Viewer.



Company Logo

**Your Company Name**
**Division Name**

**Calibration Due Listing By Due Date**

From: To:

8/23/2012 Page 1 of 1

| Due Date | Gage ID | Gage S/N | Description | Current Location | Frequency |
|---|---|---|---|---|---|
| 7/16/2012 | MSGB1 | 9087-3456-90807 | GAGE BLOCK SET, 81 PC | TOOL ROOM | 24.0 Months |
| 7/16/2012 | 001E-GBLK | 9087-3456-90807 | Gage Block 0.050-4.0 (in 81), | Gage Crib 2-3 | 24.0 Months |

2 **Records Printed**

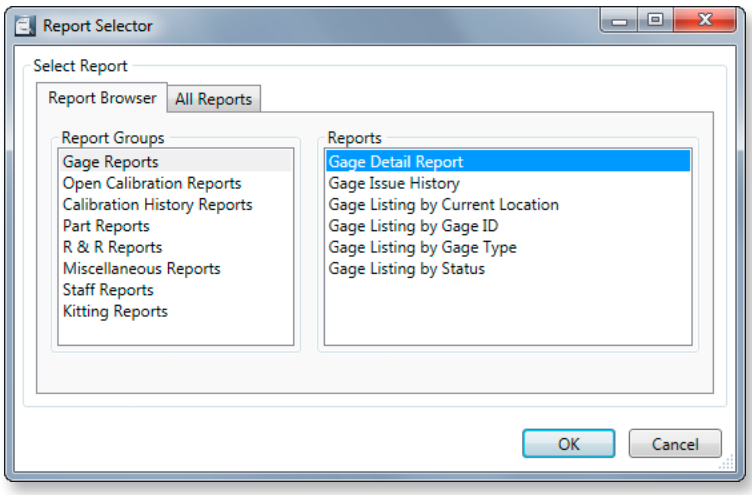
* Estimated Due Date

Calibration Due Listing By Due Date

# Chapter Six
# Reports

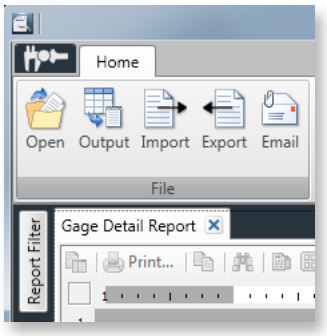
## Open Reports

Either click the application icon and then navigate to **Open -> Reports** or click the **Open** icon in the Ribbon; the **Report Selector** window appears:




The **Report Browser** tab is active by default. This tab shows the most commonly used reports. Access the **All Reports** tab to view all reports.

In the **Report Browser** tab, click on the desired **Report Group** in the left pane, click the name of the report you'd like to view in the **Report** pane and then click **OK**. The window will display a blank report page and a report filter. The report filter may be minimized like this:




Click **Report Filter** and then click the pushpin icon to keep the report filter open.

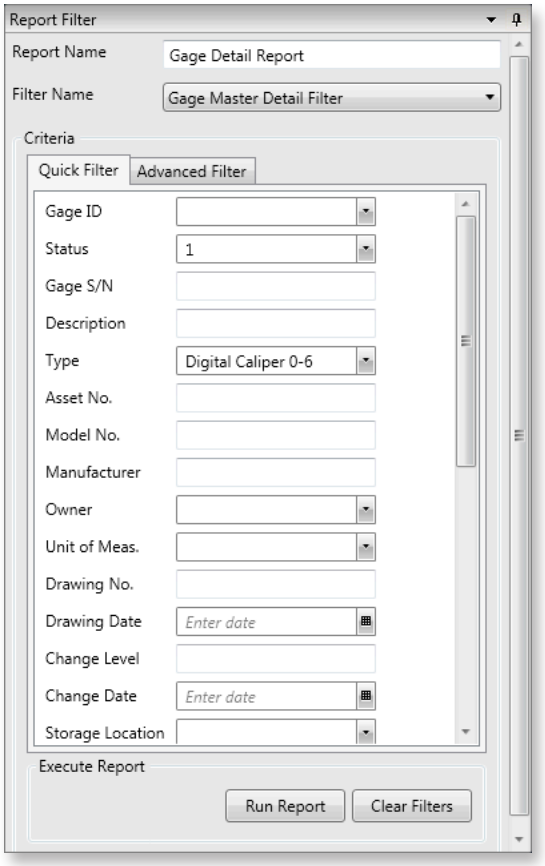
The report filter allows you to select a specific group of records for the report. There are a few reports, such as the **Calibration Due Listing** report, that are time-based; which allow you specify a **From** and **To** date range for selected criteria. All reports were designed using standard Windows True Type fonts.

# Report Filters

The **Report Filter** (displayed to the left of the report) offers both a quick filter and an advanced filter. The **Report Filter** pane can be docked to enlarge the space available for the report. To dock this pane, click the pushpin icon .

## Quick Filter

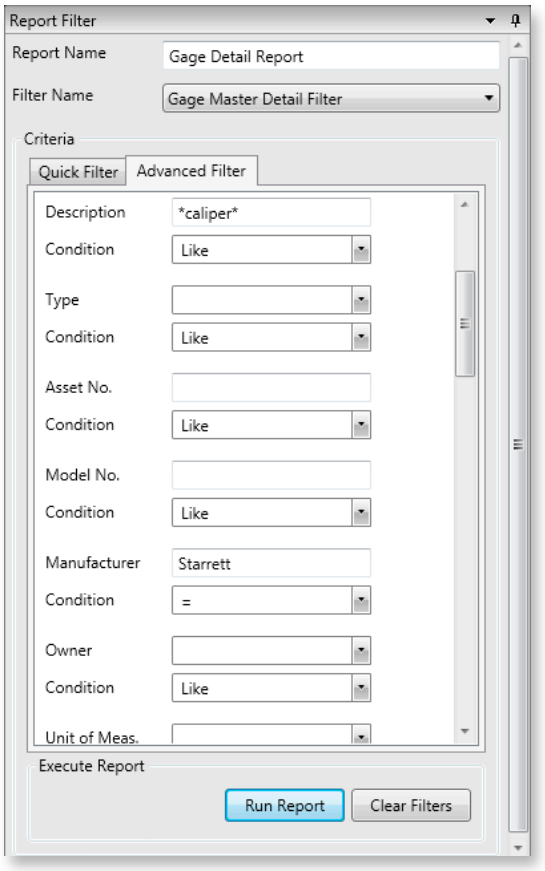
The available fields in a **Quick Filter** vary depending on which report has been selected:




Enter or select the desired criteria by which to filter your report and then click **Run Report**. The image above shows that a report will be run for all active digital calipers 0-6.

## Advanced Filter

Access the **Advanced Filter** tab of the **Report Filter** pane; the options available depend on which report has been selected:



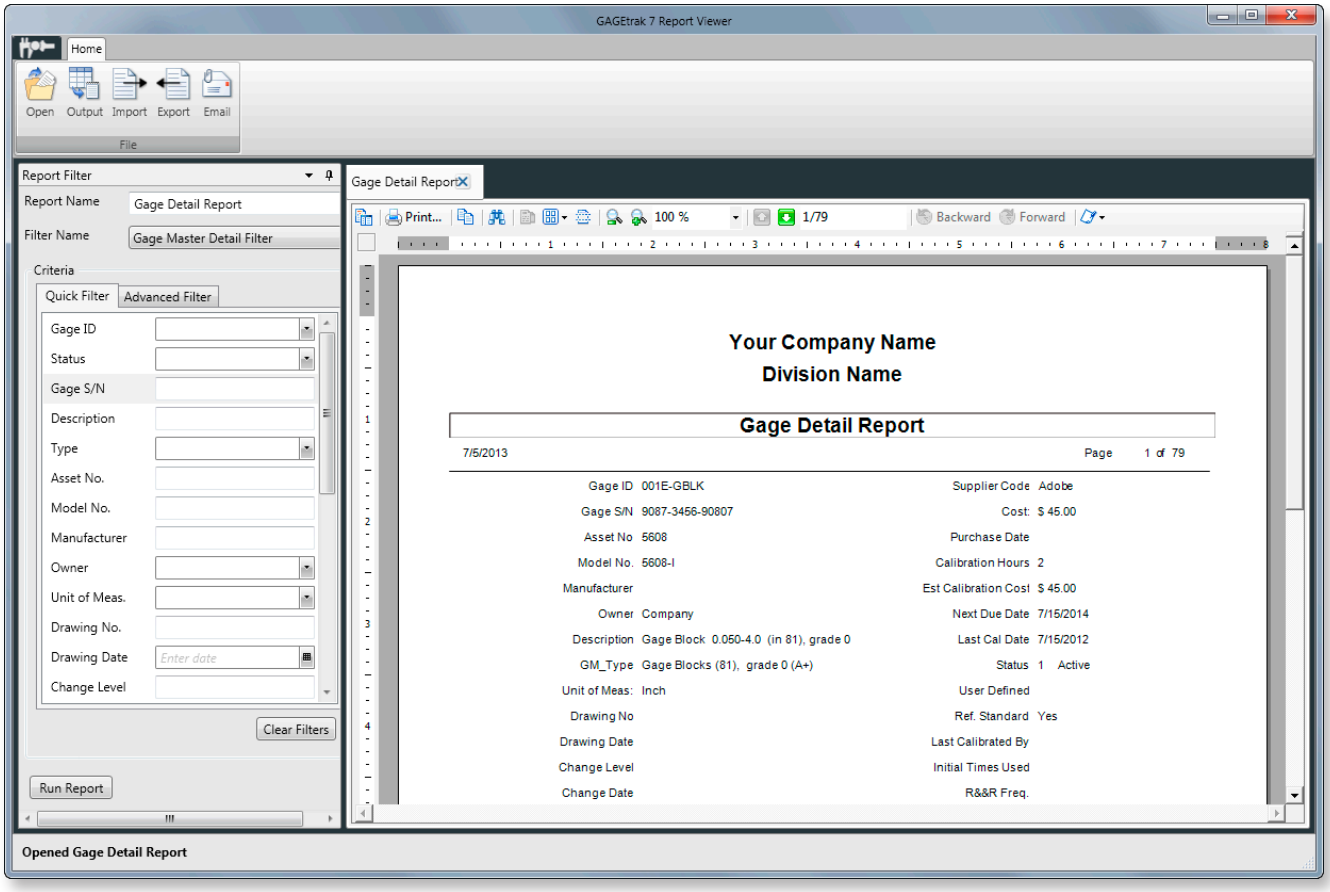

In the example above, the report will show every gage with a **Description** that contains the word *Caliper* that is manufactured by Starrett.

The asterisk (*) is a wildcard character that indicates, in this example, that you want all gage records that have a description that includes the word Caliper. 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. Likewise, if you enter Caliper*, it tells the program that you want all gage records with descriptions that begin with the word Caliper, such as Caliper Digital.

Use the **Condition** fields to select search operators such as >, <, =, etc., to include records that are greater than, less than, equal to or similar to the value you've specified.

After entering the desired criteria, click **Run Report**.

# Viewing Reports




After the report appears, you can use the vertical and horizontal scroll bars to view different parts of the report, or use the page navigation buttons to view multiple pages of the report. Use the **Zoom** buttons on the menu to view more or less of the report.

GAGEtrak's **report** toolbar contains common commands that you can use for reports. Each toolbar button is described below, pictured from left to right here:

| Field/Button | Description |
|---|---|
| Toggle Sidebar | Open a side bar showing page thumbnails. |
| Print | Print the report. |
| Copy | Copy the current report as formatted text. |
| Find | Find specific text within the report; clicking Find will open a Find window. |
| Zoom Buttons | Zoom out, zoom in or zoom to a specified percentage. |
| Fit Width | Zoom into the report to fit the width of the window. |
| Fit Page | Zoom out of the report to see a whole page at a time. |

| | |
|---|---|
| Single Page View and Multiple Page View | View a single page at a time or multiple pages at once. |
| Continuous View | Scroll from page to page within the report without having to use the Page Up or Page Down buttons. |
| First Page, Previous Page, Next Page, Last Page, Backward, Forward | Navigate through the pages of the report. |
| Refresh | Refresh the report view. |
| Pan Mode | Pan through the report; if you are in Continuous View, you can pan through all pages. |
| Selection Mode | This option allows you to select text from the report for the sake of copy/paste. |
| Snapshot Mode | This option allows you to take screenshots of the report. |

# Report Descriptions

These tables contain descriptions of the most commonly used reports, including special filtering options.

| **GAGE REPORTS** | |
|---|---|
| **Report** | **Description** |
| 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 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.<br>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 Listing with Blank Due Date | Use this report to see a list of all gages that do not currently have calibration due dates. |
| Calibration Work Order... | Use these forms to gather calibration data and document work assignments for your personnel. |
| Gage Schedule Due Listing by... | These reports list gages’ additional schedules by current location, storage location or due date. |

| 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.<br>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.<br>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.<br>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).<br>Uncertainty Format – Use the drop-down list box to select the number format for the sum of uncertainty standards that you used to calibrate the gage.<br>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 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 | Use this report to provide traceability for your calibration and reference standards. |
| Calibration Failure Notice | The Calibration failure notice can be used as part of a corrective action notification or limited use report. The notice provides displays details for each test point; including specific points or ranges that caused the failed calibration. |
| Calibration Performance | The calibration performance reports provide critical feedback regarding the performance of gage families and can help companies demonstrate a successful calibration system.<br>A summary is provided demonstrating the percentage of gages in the family that passed or failed calibration as well as other details of calibration such as the percentage found in or out of tolerance and the number of days between the calibration due date and date of calibration. |

| PART REPORTS | |
|---|---|
| **Report** | **Description** |
| Gage Requirements by Part | This report prints gage requirement sheets. |
| 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. |
| MSA Summary | Summary completed MSA studies performed for gages in the GAGEtrak database. |

| 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 Listings | List each supplier and all gages they supply to your company. |
| Procedure Listing Summary by... | Basic listings of procedures and associated gages, sorted either by gage ID or procedure name. |
| 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. |

| STAFF REPORTS | |
|---|---|
| **Report** | **Description** |
| Gage Authorized Users | This report lists each staff member and the gages each person is authorized to use. |
| Gage Staff Issue History | Provides a summary of gages issued to staff members (sorted by staff member name. |
| Gage Staff Issued to List | Provides a summary of gages issued to authorized users of gages (issue control mechanism using staff members and sorted by staff member name). |

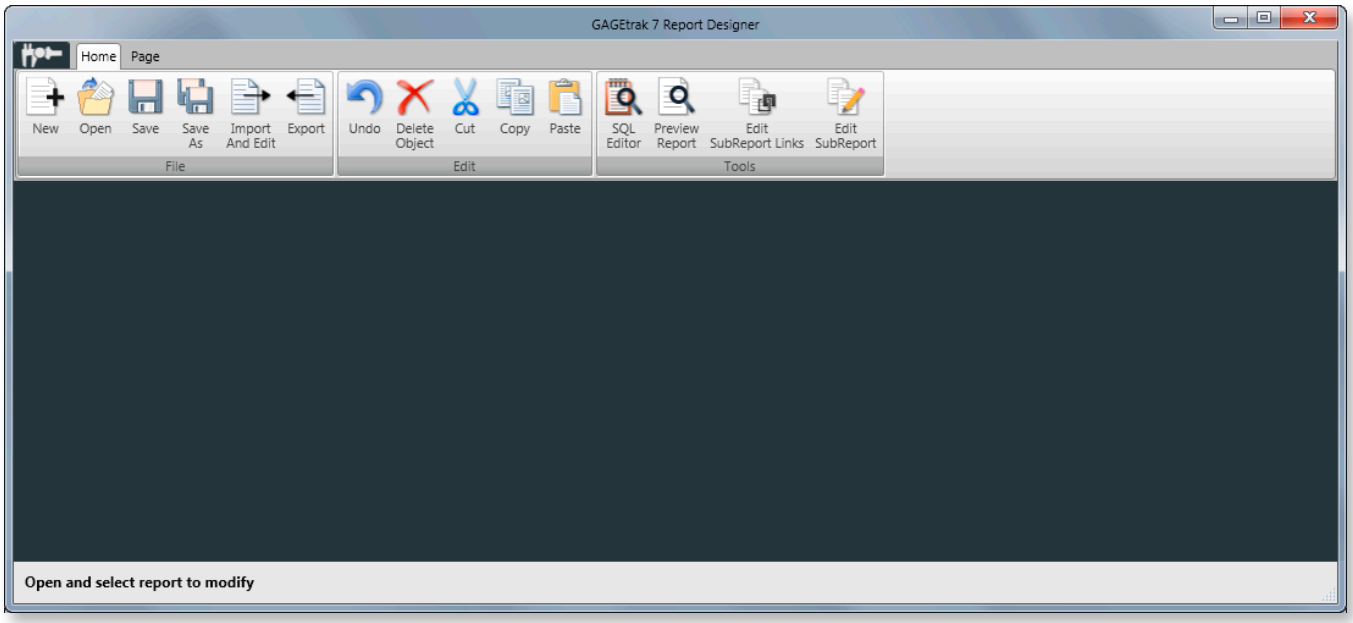
| KITTING REPORTS | |
|---|---|
| **Report** | **Description** |
| Kit Listing... | Lists all or one specified kit, and its associated Required Gage Types and Required Gage information. |
| Kit Entry History | Provides a kit issue history summary with gage issue details for each kit listed. |

# Chapter Seven
# Report Designer

The GAGEtrak 7 Report Designer is available only with the Pro edition of Report Viewer. Use Report Designer to modify existing reports and create your own custom reports. This is the same Report Designer that is available in the full version of GAGEtrak 7.

## Launch Report Designer

Click the Windows Start button and navigate to **All Programs -> GAGEtrak 7 program -> GAGEtrak 7 Report Designer**. The **Report Designer** window opens:

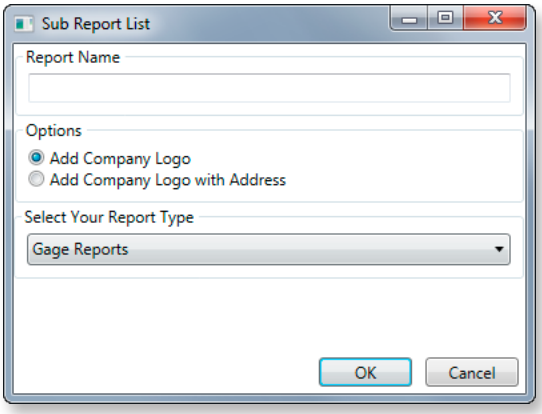
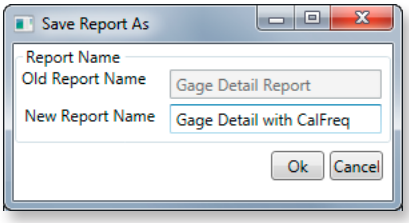


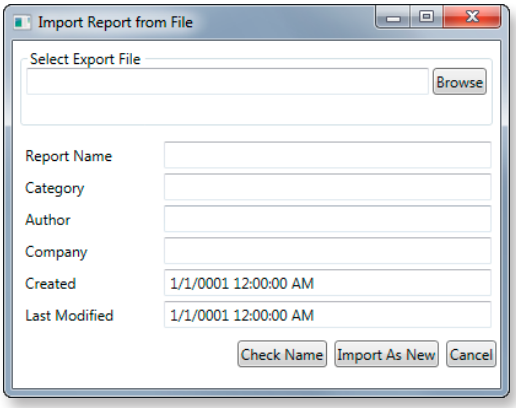
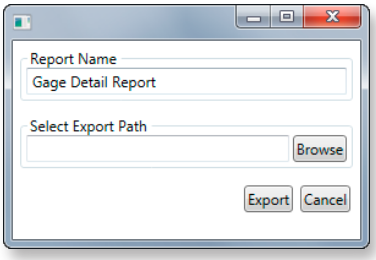
# Application Icon

Click the application icon in the upper left corner of the window. This menu contains many of the same functions as Report Viewer; please see the Program Conventions chapter of this guide for detailed explanations of **Open**, **Output**, **Export/ Import** and **Help**.

# The Ribbon

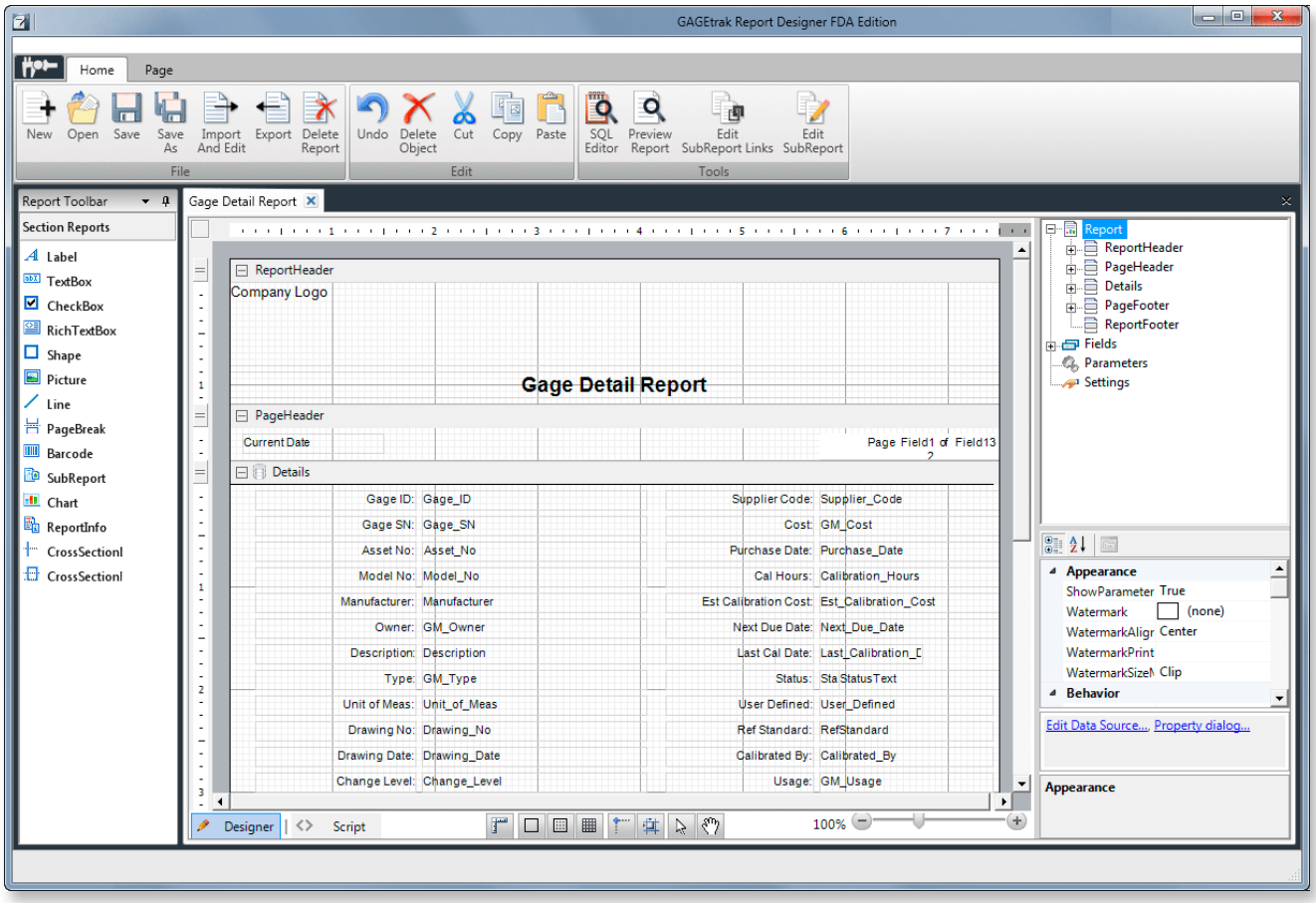
As is the case in Report Viewer, the Ribbon in Report Designer can be minimized to open up more workspace. Please see the Program Conventions chapter for more detail. The Report Designer Ribbon contains the following options:

| Icon | Function |
|---|---|
| New | Create a new report; click this icon (or use the keyboard shortcut Ctrl N) and then select the report type and name it:<br>  |
| Open | Open an existing report in order to modify it; clicking this icon (or using the keyboard shortcut Ctrl O) displays the **Report Selector** window. Select the group, select the report and then click **OK**. |
| Save | Save all changes to the current report by clicking this icon (or using the keyboard shortcut, Ctrl S). |
| Save As | Click this icon (or use the keyboard shortcut Ctrl A) to save the report with a new name.<br>  |

| | |
|---|---|
| Import And Edit | Import GAGEtrak reports from other versions of GAGEtrak or other GAGEtrak databases.<br>  |
| Export | Export reports to be used by other GAGEtrak databases.<br>  |
| Undo | Undo the most recent change. |
| Delete Object | Delete the selected object(s). |
| Cut | Cut your selection when editing field entries and store that text on the clipboard. |
| Copy | Copy your selection when editing field entries and store that text on the clipboard. |
| Paste | Paste text from the clipboard into the active field. |
| SQL Editor | Click this icon to open the SQL Editor and modify the SQL statement of a report. |
| Preview Report | Click this icon (or use the keyboard shortcut Ctrl P) to view your report in Report Viewer. |
| Edit SubReport Links | Select a sub-report and then click this icon in order to edit the field by which the main report and sub-report are linked, i.e., the parent-child relationship between the two reports. |
| Edit SubReport | Select a sub-report and then click this icon; the sub-report will open in a separate tab of Report Editor, allowing for modifications. |

# Modify an Existing Report

To begin modifying an existing report, click the **Open** icon in the Ribbon and select the desired report from the **Report Selector** window. The report will be displayed:

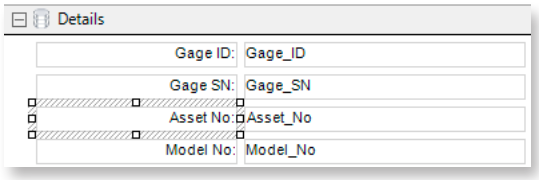



The center portion of the screen is the designer canvas which presents label fields and text fields. A label field appears exactly as-is when you run the report; a text field pulls data from your database. In the image below, **Gage ID:** is the label field and **Gage_ID** is the text field.

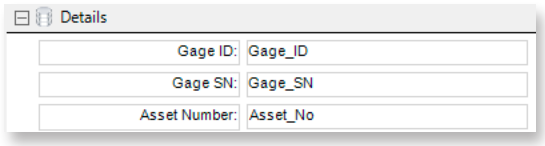
| | |
|---|---|
| Gage ID: | Gage_ID |
| Gage SN: | Gage_SN |
| Asset No: | Asset_No |
| Model No: | Model_No |
| Manufacturer: | Manufacturer |
| Owner: | GM_Owner |
| Description: | Description |
| Type: | GM_Type |
| Unit of Meas: | Unit_of_Meas |
| Drawing No: | Drawing_No |
| Drawing Date: | Drawing_Date |
| Change Level: | Change_Level |

Click on any field in the report and in the upper right pane of the window, you will see that the field is noted as either label or text.

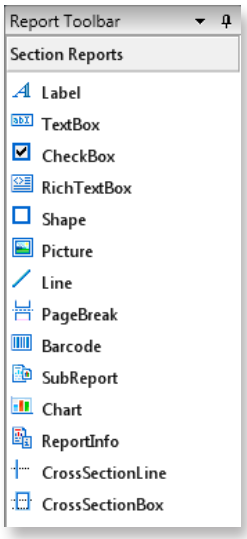
To modify a text field, simply overwrite the contents of that field with your desired text. For example, select the **Asset No:** label field:




Then, overwrite **Asset No:** with **Asset Number:**

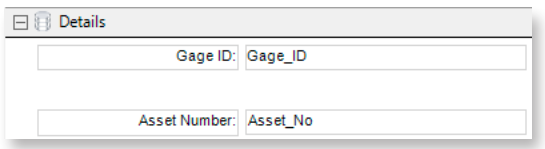



If after modifying a text field, the change you made is not displaying correctly when you run the report, then that text field's contents might be dictated by tables in the database. If that's the case, you can delete such a text field and create a new one. After deleting the field, click **Label** in the **Report Toolbar**:



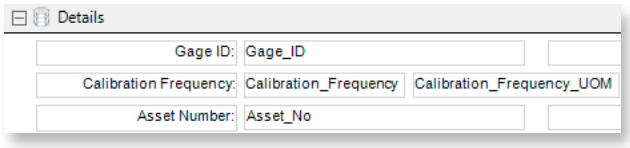

Then, in the canvas area, click and drag a rectangle to create your new field. Label the field as desired and then modify the properties in the in the lower right pane of the **Report Designer** window, such as font size and color, etc.

You can also delete, add and move fields. In this example, we will remove the Gage SN fields. Select both the label field and the text field and then either right-click and delete or simply click the **Delete** icon in the Ribbon .

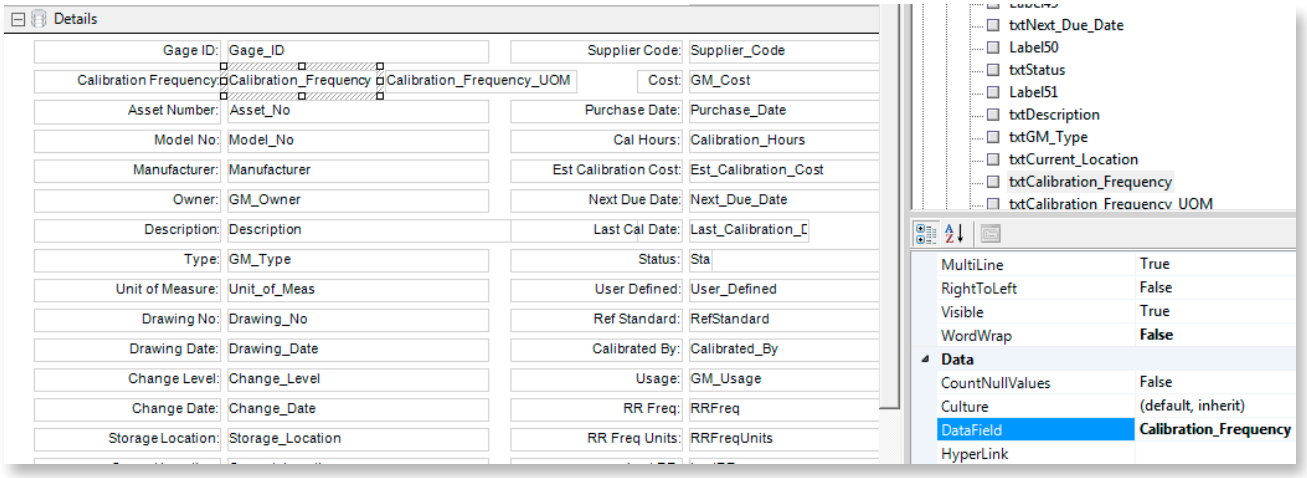


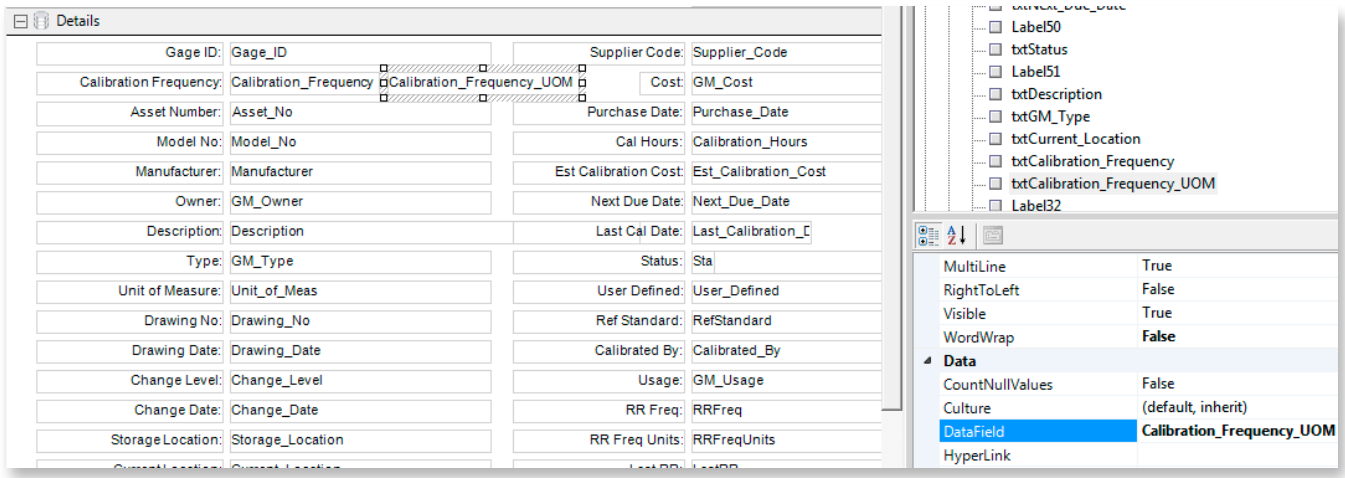
This Gage Detail report already includes Calibration Frequency, but it's split onto two lines. Let's say you want to retain that information, but make it appear on one line. When using Calibration Frequency in a report, you'll want to include both Calibration Frequency and Calibration Frequency UOM text fields; however, you will only need a single label field.

To simplify your efforts, you can copy and paste existing label/text field groups so that you don't have to modify each field's properties, such as font and alignment.

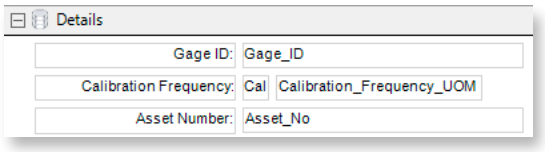



After copying/pasting, select one of the new text fields; in the lower right pane of the window, locate the **DataField** row. This row displays the name of the data source that gets pulled into that field. If, for instance, you copy/paste the Gage ID fields and overwrite the field contents in the canvas, the **DataField** area will still show Gage_ID. You would need to modify that value.



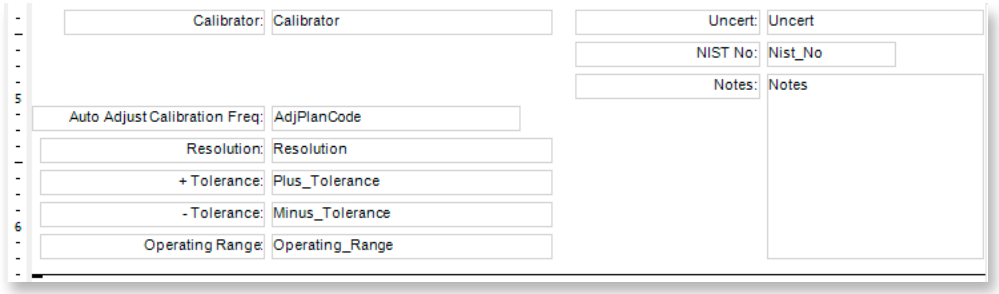



You can resize fields as necessary by selecting the field and then clicking and dragging one of the open squares along the perimeter of the field:



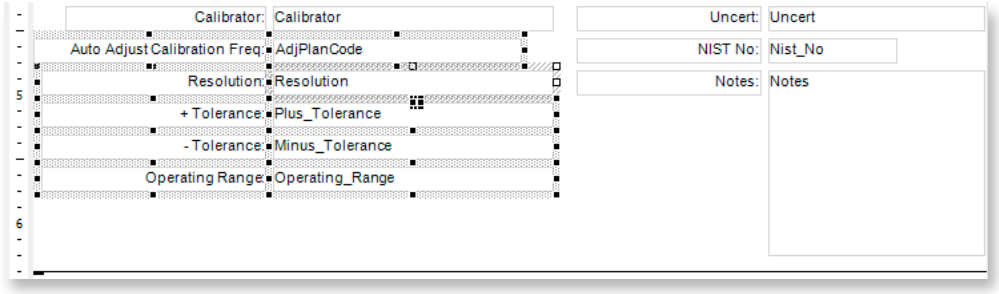

Since this particular report already contains Calibration Frequency further down the report, we will delete those fields and move the remaining fields upward.

Delete the fields:

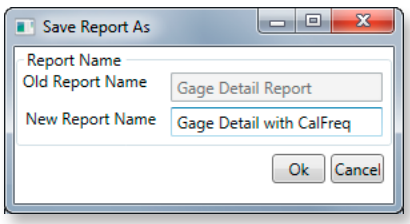



Move remaining fields upward:

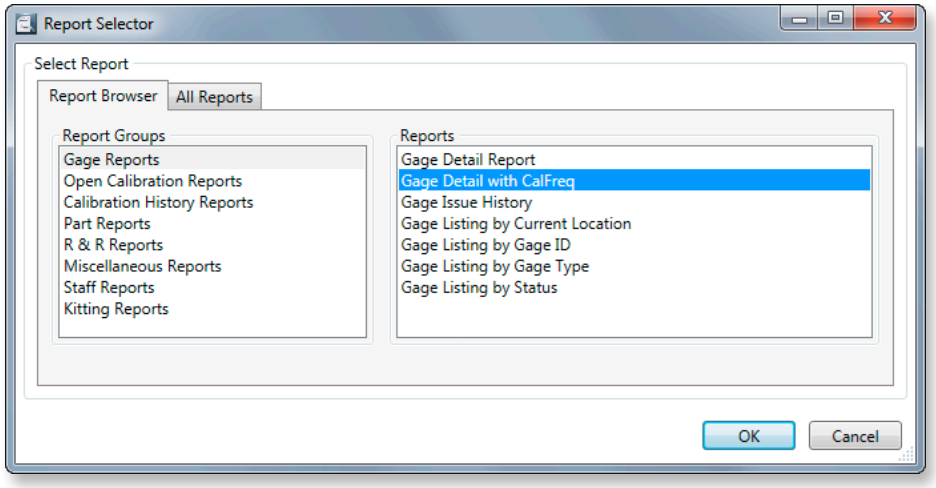
Click and drag your mouse over all desired fields and then either drag them into place or use the arrow keys on your keyboard.



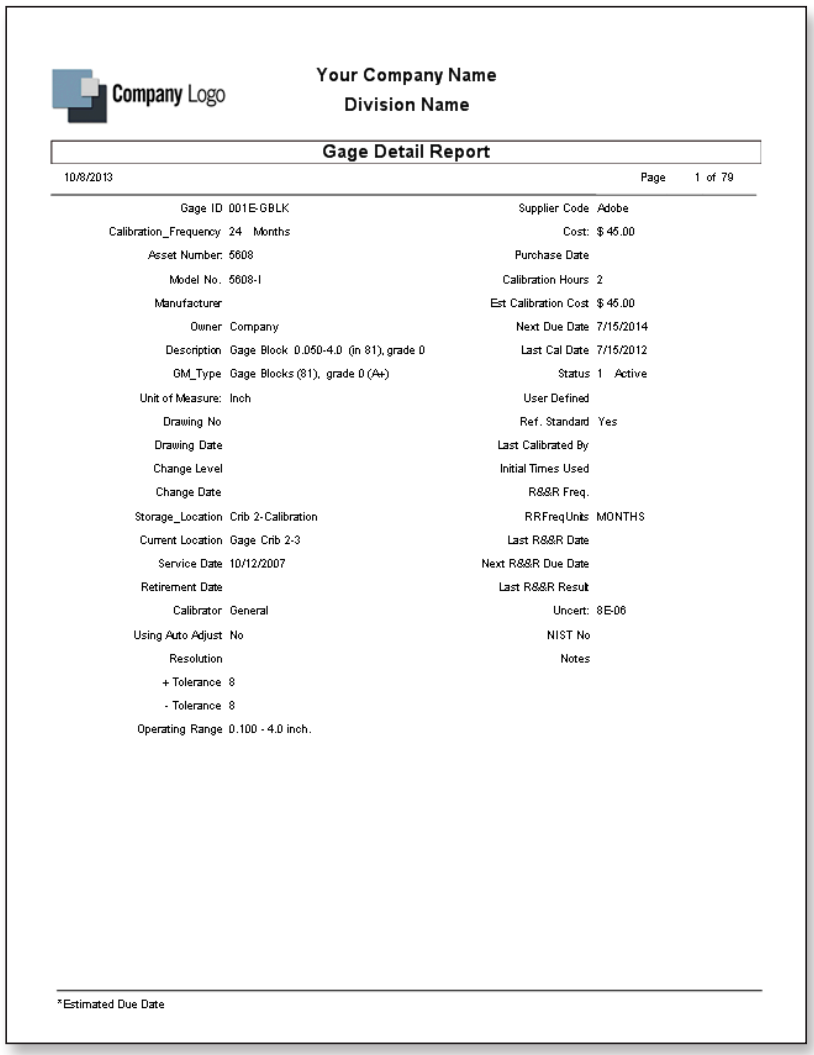

Now that we have altered the report, we need to save it. If you click the **Save** icon, you will overwrite the existing report. If you want to save your new report with a new name, click the **Save As** icon; the following window opens, allowing you to name your new report. Enter the new name and click **OK**.



Click the **Preview Report** icon ; **Report Viewer** opens. Click the **Open** icon; the **Report Selector** window is displayed:




Select your newly created report and then click **OK**. You can specify filter criteria, if you like, or you can simply click the **Run Report** button in the filter pane.


Company Logo

Your Company Name
Division Name

**Gage Detail Report**

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| | | | |
|---|---|---|---|
| Gage ID | 001E-GBLK | Supplier Code | Adobe |
| Calibration_Frequency | 24 Months | Cost: | $ 45.00 |
| Asset Number: | 5608 | Purchase Date | |
| Model No. | 5608-I | Calibration Hours | 2 |
| Manufacturer | | Est Calibration Cost | $ 45.00 |
| Owner | Company | Next Due Date | 7/15/2014 |
| Description | Gage Block 0.050-4.0 (in 81), grade 0 | Last Cal Date | 7/15/2012 |
| GM_Type | Gage Blocks (81), grade 0 (A+) | Status | 1 Active |
| Unit of Measure: | Inch | User Defined | |
| Drawing No | | Ref. Standard | Yes |
| Drawing Date | | Last Calibrated By | |
| Change Level | | Initial Times Used | |
| Change Date | | R&R Freq. | |
| Storage_Location | Crib 2-Calibration | RRFreqUnits | MONTHS |
| Current Location | Gage Crib 2-3 | Last R&R Date | |
| Service Date | 10/12/2007 | Next R&R Due Date | |
| Retirement Date | | Last R&R Result | |
| Calibrator | General | Uncert: | 8E-06 |
| Using Auto Adjust | No | NIST No | |
| Resolution | | Notes | |
| + Tolerance | 8 | | |
| - Tolerance | 8 | | |
| Operating Range | 0.100 - 4.0 inch. | | |

*Estimated Due Date

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