GAGEtrak® 7

The World's #1 Calibration Management Software Solution

Getting Started Guide

CyberMetrics®

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Getting Started Guide

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Chapter One
Introduction

Overview

We're proud to welcome you to GAGEtrak 7 for Windows, a database software program that automates your calibration information, saving you time and giving you precise control over the tools you use to do your job. The program was designed for quality control professionals who need a convenient, easy-to-use and powerful method for documenting, tracking and retrieving calibration information. Once you've mastered its essentials, GAGEtrak will become a vital tool for managing your calibration records.

The GAGEtrak installer will automatically install a copy of the User Guide onto your hard drive; it is accessible via the GAGEtrak 7 program group (Windows Start button -> All Programs -> GAGEtrak 7.0). The User Guide provides detailed instructions on every feature and function of the program; the file will open with Adobe Acrobat Reader which must be installed on your computer and can be downloaded free from www.adobe.com. All of the User Guide content is also accessible via the program's Help file.

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

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

Measurement and Calibration

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

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

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

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

Chapter Two
How Does GAGEtrak Work?

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

A Typical Day in the Calibration Laboratory

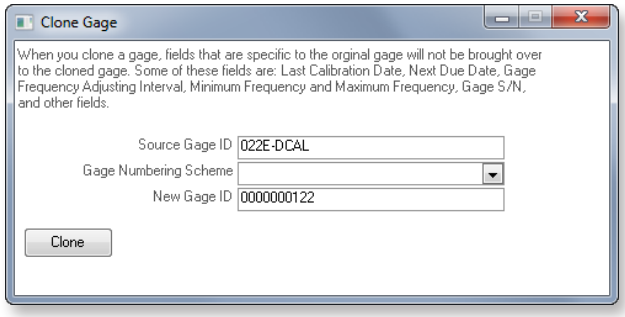
It's Monday morning and it's time to plan the day. The QC manager asks you for the weekly **Calibration Schedule**. You anticipated this request and you've already printed it, so your first task of the day is finished almost effortlessly.

Next, you pour your coffee, turn on your computer and start up GAGEtrak to help you plan the rest of your day. The GAGEtrak **Dashboard** displays the **Calibrations Due** and **Additional Schedules Due** as a handy reference so that you can be sure that all required work is finished today.

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

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

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

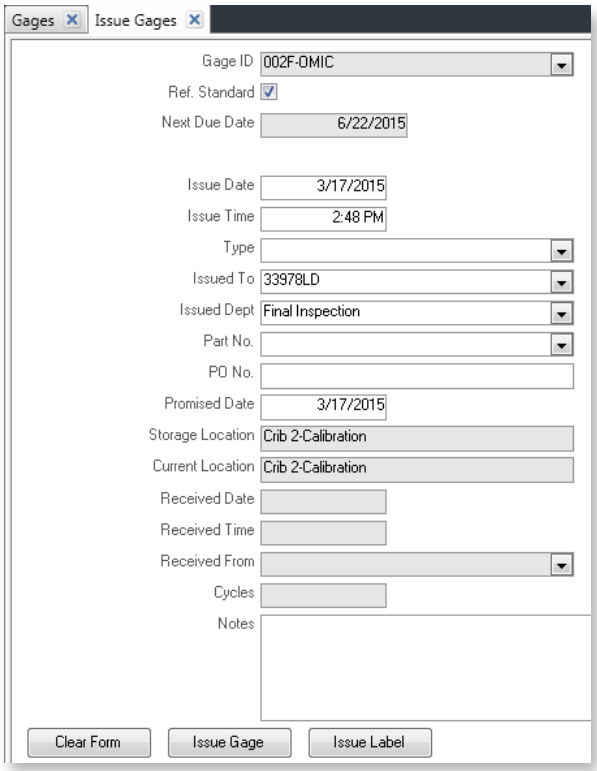


After you clone the first gage, it's time to enter a record for a completely different type of gage. You enter all of the specifications for the gage and you're ready to enter its calibration standards. Because you will electronically check this gage at incremental intervals during calibration, you use GAGEtrak's **Calibration Standards Prefill** feature to automatically create the eight calibration checkpoints required. You'll need a new procedure for calibrating, too. You use *CalPro*, a database of step-by-step calibration procedures that covers everything from gage blocks to micrometers and calipers. Thanks to *CalPro*, you don't have to waste time researching or creating calibration procedures. You can simply import the procedures directly into GAGEtrak. Using *CalPro* also helps your company comply with ISO 9001:2015 and ISO/TS 16949 quality standards.

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

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

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



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

Because you expect your auditor to arrive tomorrow, you print the **Calibration History with Measurements** report for the last three months, for all of your gages. You also print the **Standards Traceability** report, which shows all of the reference standards associated with your calibration standards for every calibration. Now you have documented proof as to exactly which instrument or standard you used to calibrate each gage. If your auditor asks for more information about your reference standards, you can quickly generate reports showing each one's NIST

number, uncertainty, calibration schedule, calibration history, calibration certificate numbers and even the exact calibration measurements, since you've entered this much detail into your GAGEtrak records.

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

Benefits

As you can see, using GAGEtrak and its accessories saved you a lot of time, effort and stress:

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

Chapter Three
Installation and Data Transfer

Now that you've seen how GAGEtrak works, it's time to install your software. The following instructions will tell you how to install and run the software quickly, allowing you to evaluate its major functions. For more detailed information, please consult the GAGEtrak 7 User Guide.

System Requirements

Recommended Hardware & OS Requirements

- Windows Vista, 7, 8 or 10 (32 Bit or 64 Bit)
- Hard disk with 350 MB of free space for program files and 200-500 MB of free space for a typical database
- 4 GB RAM required; 8 GB recommended
- Pentium 2.0 GHz CPU required; 3.00 GHz or higher recommended
- Display: 1440 x 900 (16:9 widescreen) for optimal presentation or 1152 x 864 (4:3) minimum
- Mouse or compatible pointing device
- Ink-jet or laser printer for printing reports (reports can also be emailed as PDF files)

Network Requirements (Optional)

(Only for multi-user networking)

- Local Area Network at 100Mbit or higher speed

Client/Server Database Requirements (Optional)

- Microsoft SQL Server 2014 (32 Bit or 64 Bit)
- Microsoft SQL Server 2012 (32 Bit or 64 Bit)
- Microsoft SQL Server 2008 (32 Bit or 64 Bit)

Installing GAGEtrak

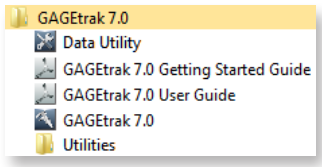
Note: We recommend that you install GAGEtrak under the Windows user profile that will be utilizing the software. The setup will prompt you for administrative credentials to complete the installation.

The User Guide contains detailed information about different ways to install GAGEtrak and set it up on a network, including how to set it up in a client/server environment. However, if you'll just be using the program on one PC and installing it from the supplied media, double-click the **Setup.exe** file to launch the installer and follow the on-screen instructions.

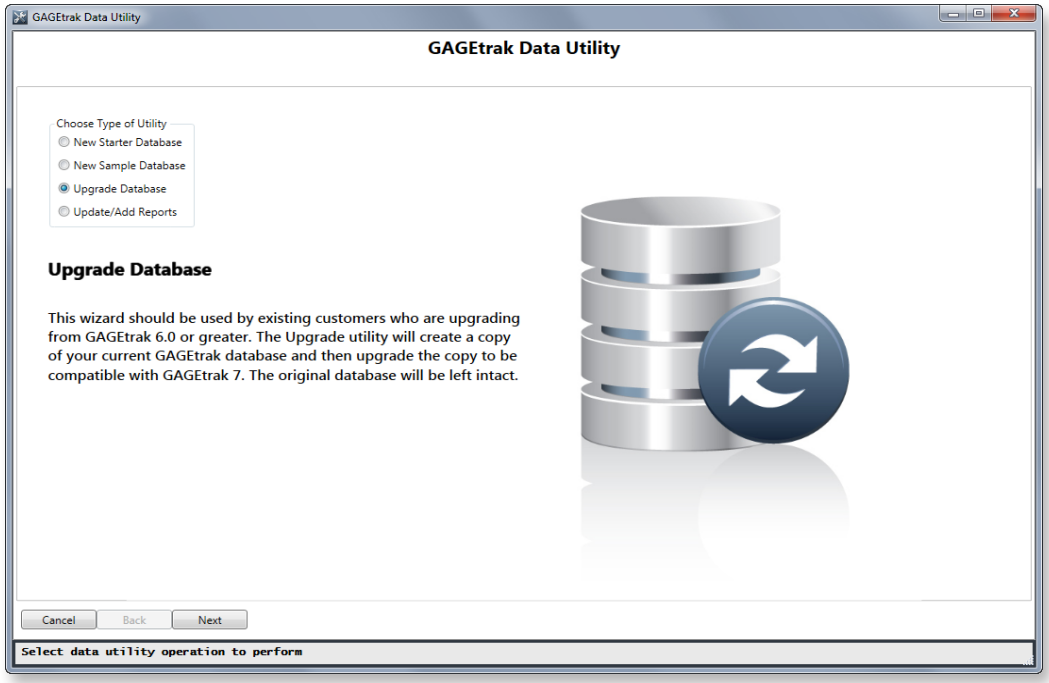
Upgrade Database from Previous Versions

The **Upgrade Database** option in the **Data Utility** allows you to browse to and select your existing GAGEtrak 6.x database and transfer the data to one of the GAGEtrak 7 databases installed on your system. There is no Data Utility required for 7.0.4 users, but 7.0.3 and older will need to run the Data Utility.

To transfer data, select **Data Utility** from the GAGEtrak 7.0 program group in your Windows Start Menu.



To migrate data from GAGEtrak version 6.0 or greater, click the **Upgrade Database** radio button and then click **Next**. Follow the on-screen instructions.



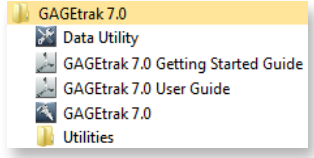
Chapter Four
Running GAGEtrak

Launching GAGEtrak

Once the installation has successfully completed, you should have the following:

- A GAGEtrak 7 shortcut icon on your desktop (if this option was selected during installation).

- A GAGEtrak 7 program group in your Windows Start Menu containing shortcuts to the GAGEtrak 7 application, User Guide and Getting Started Guide, the Data Utility function and Compact functions.

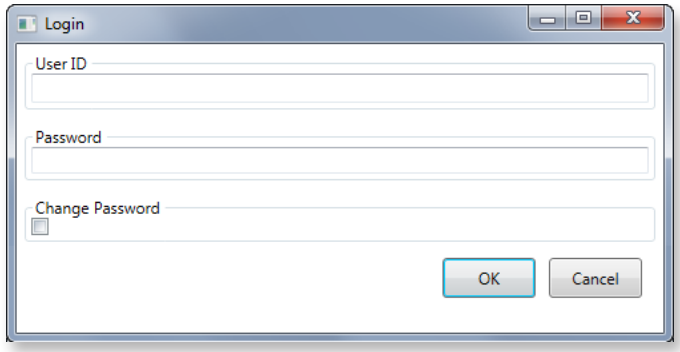


- A Windows directory containing the GAGEtrak 7 application files:
  The default path in Windows 7 is **C:\ProgramData\CyberMetrics Corporation\GAGEtrak 7.0**

Launch the GAGEtrak 7 application from either the desktop icon or the shortcut in the GAGEtrak 7 program group. Please do not modify the properties of these shortcuts, as this may affect the program's ability to correctly launch.

First-time Login

GAGEtrak requires users to log in if security has been activated through **Settings -> Security** or if the FDA Edition of GAGEtrak is being used. The **Logon** window shown below will appear. Enter your User ID and Password in the appropriate fields and then click **OK** to log in.

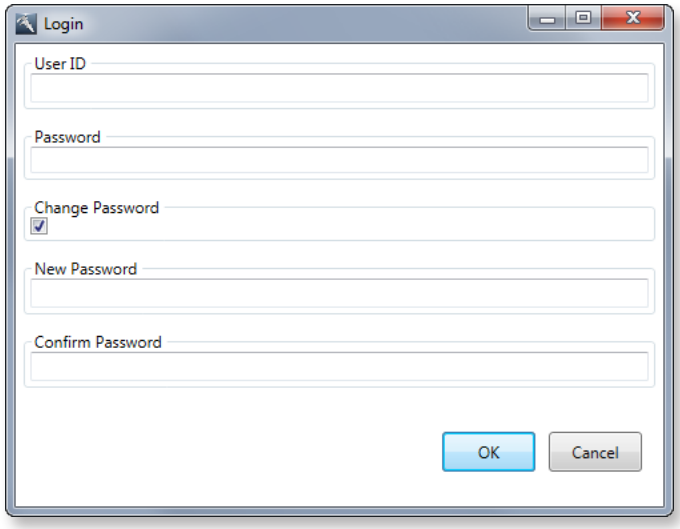


Enter Default in the **User ID** field and click **OK**. You will receive a message stating that this is the first entry for User ID: Default.

Click **OK** on the message and the **Login** form will now display **New Password** and **Confirm Password** fields.

Enter a password in the **New Password** field, enter the same password in the **Confirm Password** field and click **OK**. GAGEtrak will require you to enter this password the next time you log in.

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



Chapter Five
New Features in GAGEtrak 7

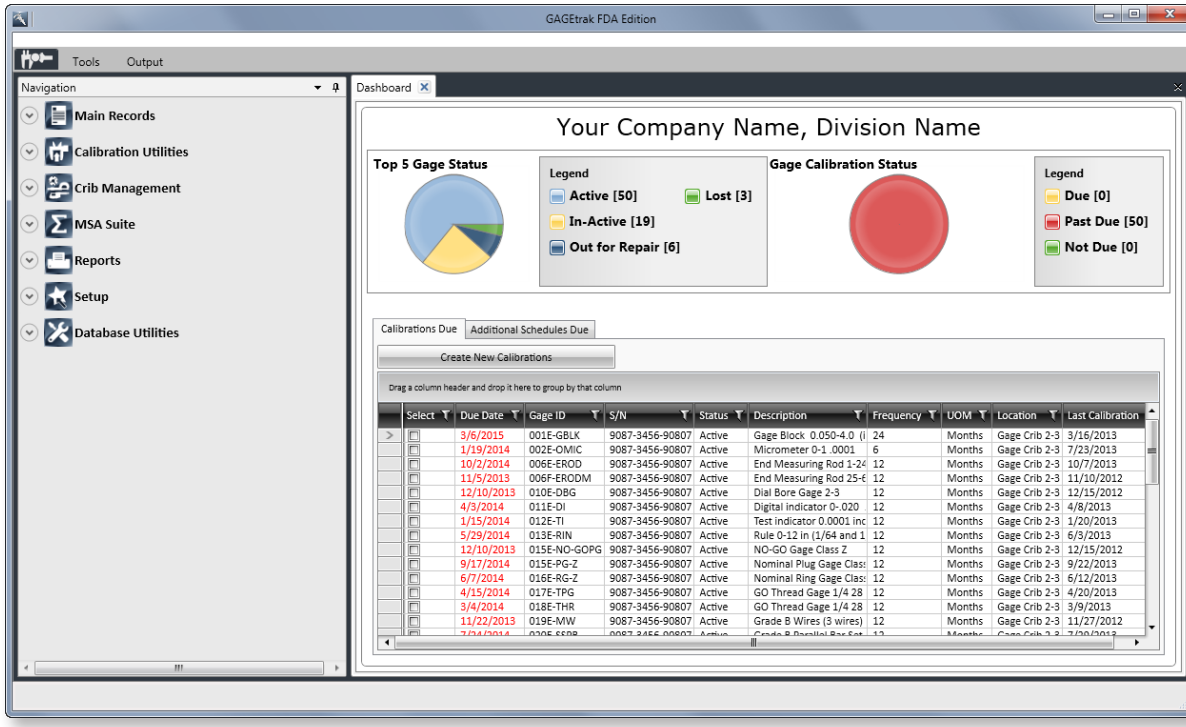
Interface

The GAGEtrak 7 interface provides more productivity and data management tools than previous versions:

- Dashboard
- Menu System
- Master Tabs
- Search Box Navigation Tool and Text Filters
- Customizable Drop-down List Controls
- Gage Management Tool
- Data Connection
- Reporting

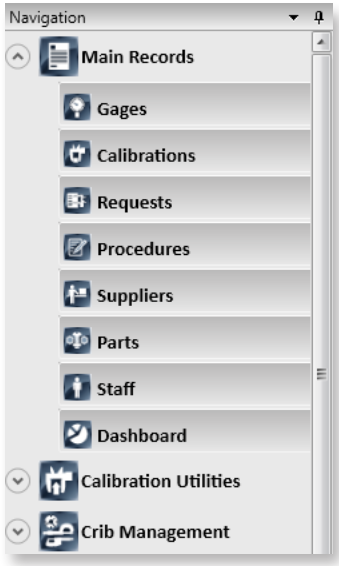
Dashboard

GAGEtrak 7 offers a dashboard system that organizes and presents information in an easy-to-read format. The new graphing format shows you the **Top 5 Gage Status** counts in your system and provides a graphical presentation of gages due versus not due. The **Calibrations Due** and **Additional Schedules Due** tabs in the lower half of the dashboard replace the **Automatic Calibration Due Listing**.



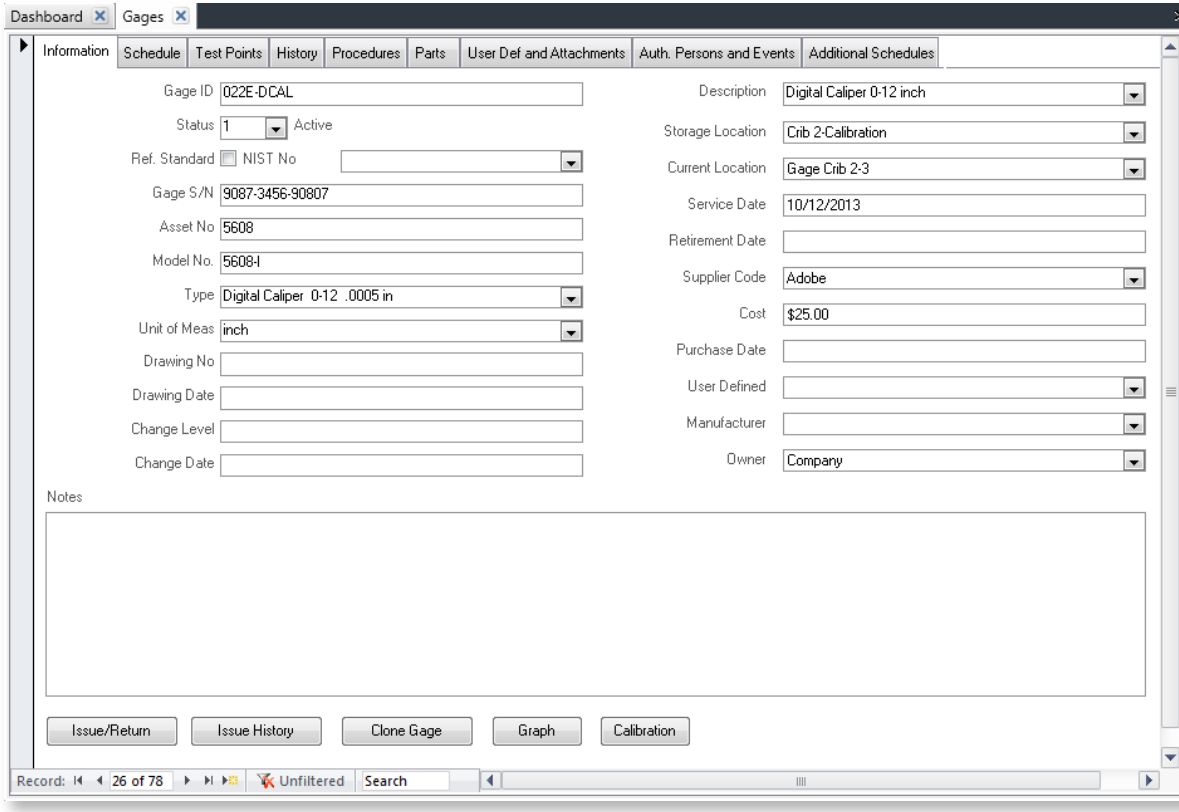
Menu Navigation System

The GAGEtrak 7 **Navigation Menu** provides hierarchical access to each category. The **Navigation Menu** 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 the need to close out previously opened forms or losing your place while seeking information from other areas.



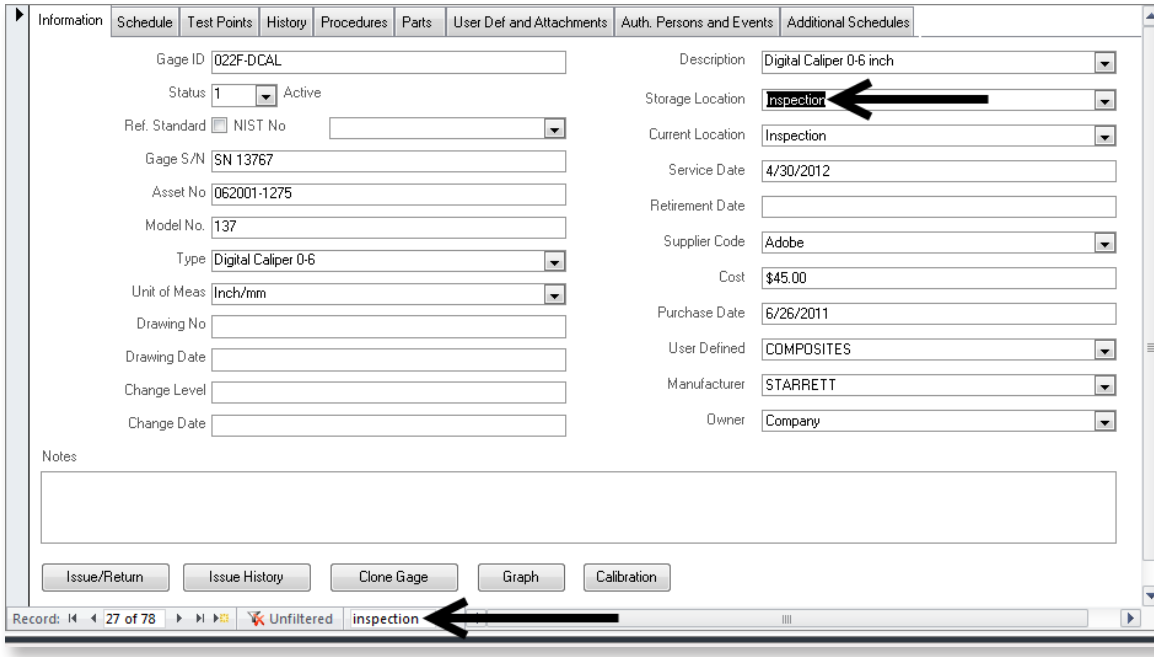
Master Tab Feature

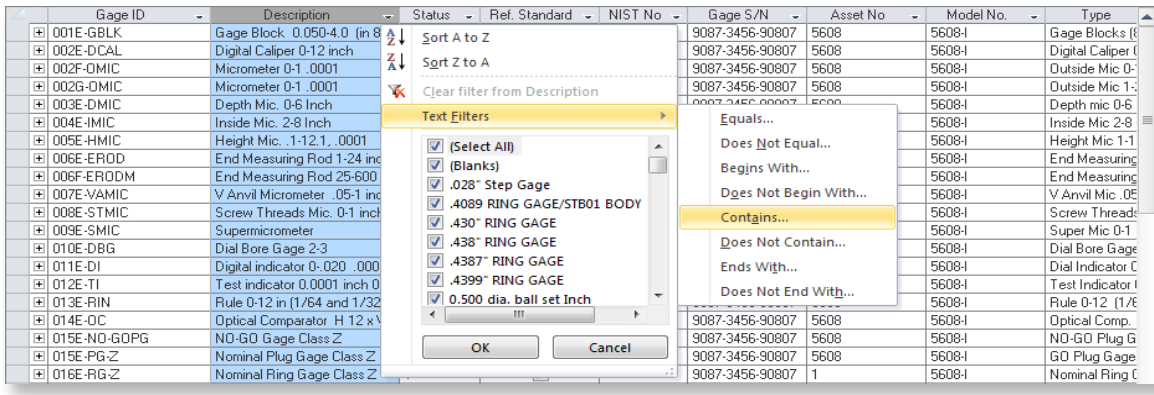
The Master Tab feature permits multiple forms to be open simultaneously, permitting access to other areas of the program without needing to close other open forms.



Search Box Navigation Tool and Text Filters

The search box navigation tool permits quicker access to specific records in the system without requiring field selection. Simply type in the value you would like to find and you will be taken to the first occurrence of that value in your current record set. GAGEtrak 7 also has text filters in the column controls in datasheet view that increase search and sorting capabilities. Please note that if you are using an SQL database, the text filter screen(s) you see may differ from those shown here.

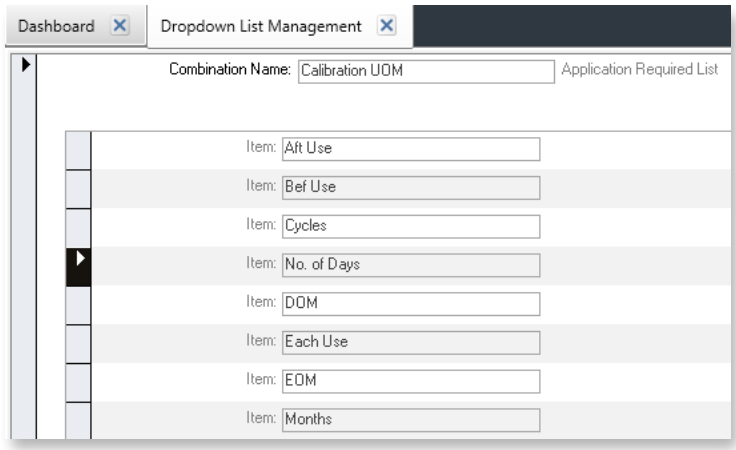


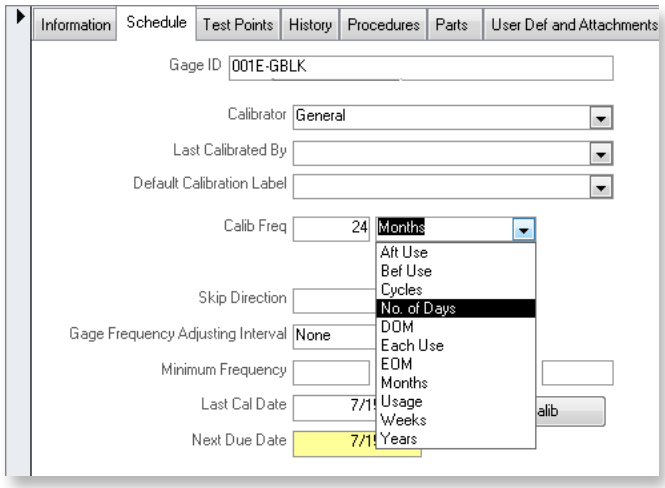


Customizable Drop-down List Controls

Customizable drop-down list controls help eliminate erroneous entries that often clutter the drop-down list boxes. This can also be used to ensure that only pre-defined information can be selected, insuring compliance to any data standards you implement.

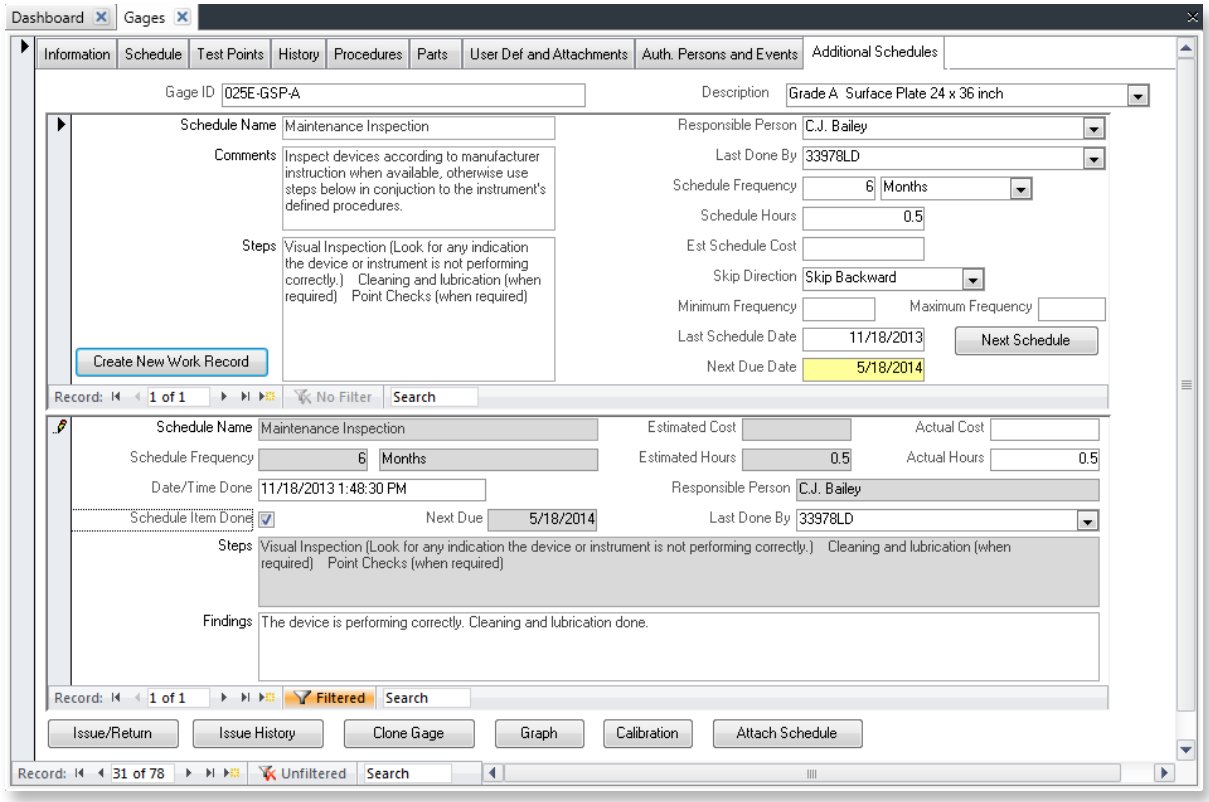
For example: In the **Gages -> Schedule** tab, you will notice that for **Calib Freq**, the user has the opportunity to select a predefined unit of time from the drop-down list. If the user would prefer **Days** to display as **No. of Days**, this is the module that will allow you to make that revision. Simply overwrite the existing text with your preferred text:





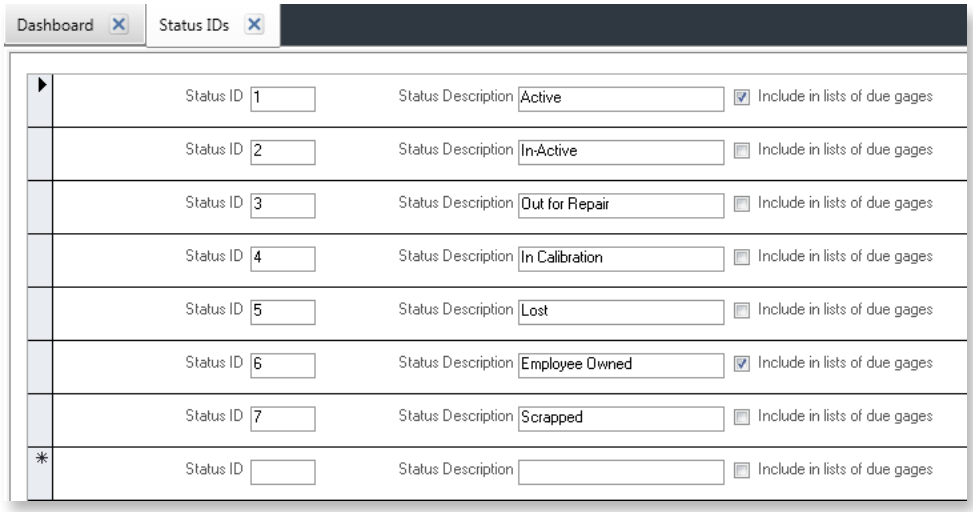
Additional Schedules

GAGEtrak 7 has several features that will enhance your overall gage surveillance. The **Additional Schedules** feature gives you the ability to schedule additional due dates for your gage records such as a maintenance date or the date on which you would like to send the gage to a calibration provider. Each **Additional Schedule** is user-defined, so it can be used for virtually any scheduling need.



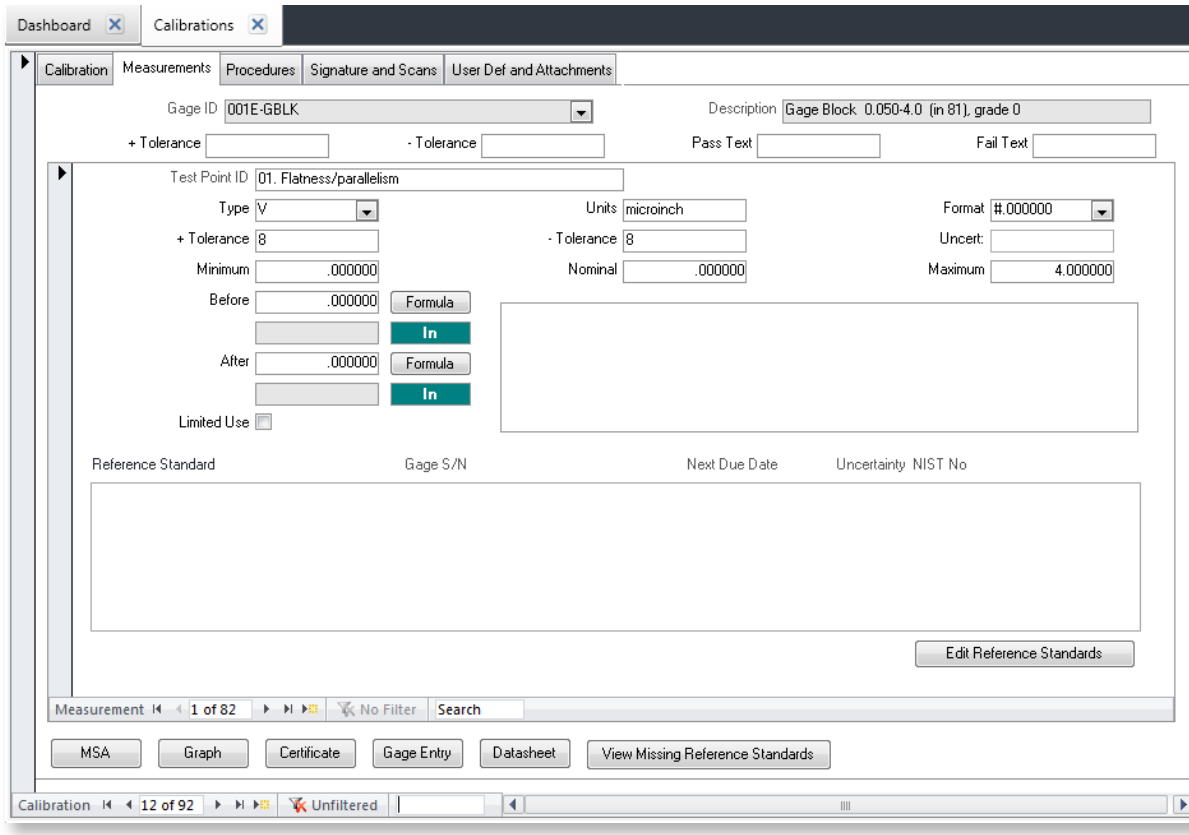
Gage Status Monitoring

Enhanced gage status monitoring allows you to select multiple status indicators for due listings and scheduling, whereas past versions of GAGEtrak only took active status gages into account.



Multiple Reference Standards

GAGEtrak 7 supports multiple reference standards on each test point, so that measurements that utilize a combination of master standards can be accurately documented. The **Measurements** screen also provides support for multiple tolerances within a single calibration. This feature permits accurate tolerance recordings for gages or instruments that support multiple plus and minus tolerances.

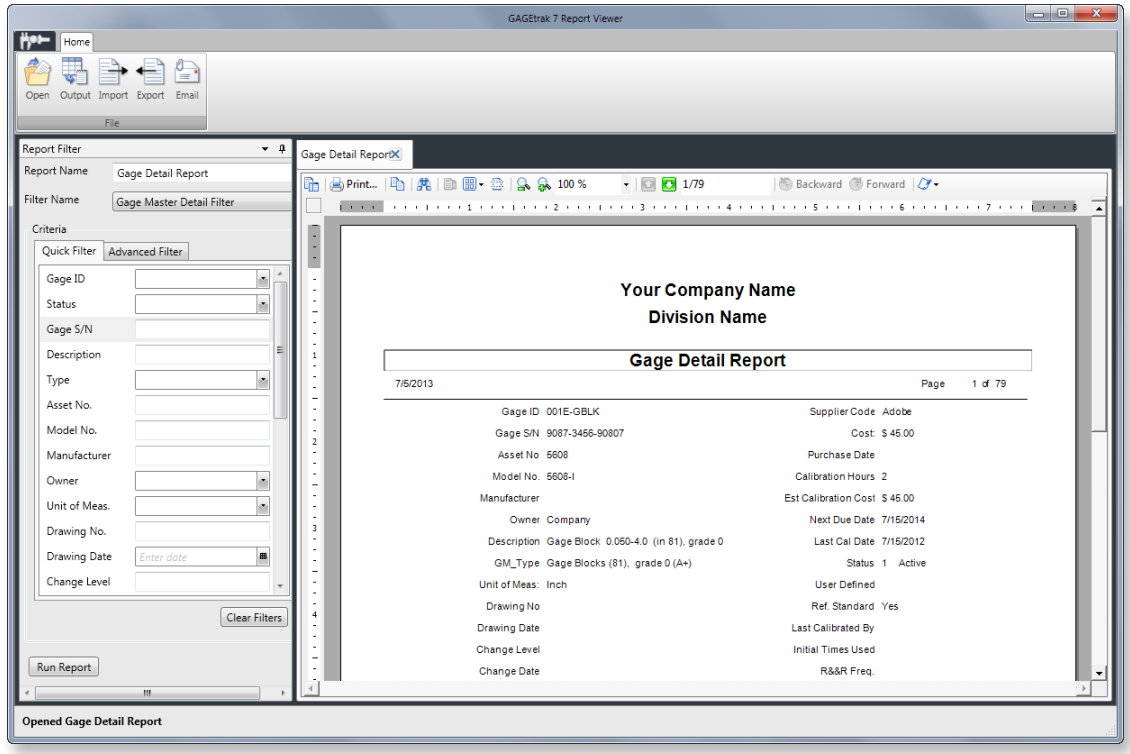


Data Connection Tool

The enhanced data connection tool allows you to save and edit several database connections, making it much simpler to connect to another GAGEtrak data source without having to re-enter credentials. First, create and accept a new data source: click the application icon in the upper left corner of the screen, click **Change Database** and then click the **New Connection** icon ✚. Fill out the appropriate information and click **Save**. Now, go to **Change Database -> Current Connection** to connect to the new data source.

Report Viewer

GAGEtrak has an enhanced reporting engine that provides more flexibility and better integration with GAGEtrak add-ons. The **Report Viewer** runs separately from GAGEtrak, so you can view a report while simultaneously accessing records in GAGEtrak to search for and verify records. To generate reports, from the main menu, navigate to **Reports -> Report Viewer**, select the report and click **OK**.

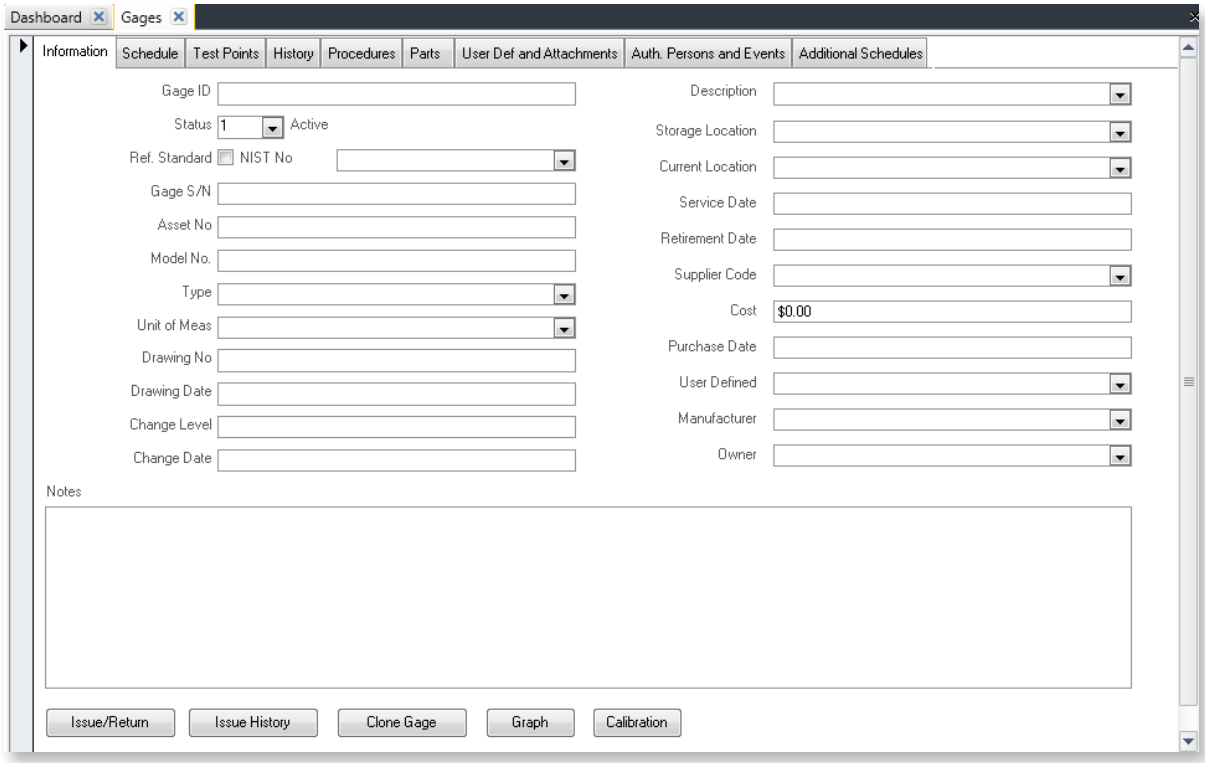


Chapter Six
Entering Gage Records

Introduction to Gage Entry

The following information will get you started entering gage records. For further information on gage record entry, calibration record entry and other functions of GAGEtrak, please refer to the GAGEtrak 7 User Guide.

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

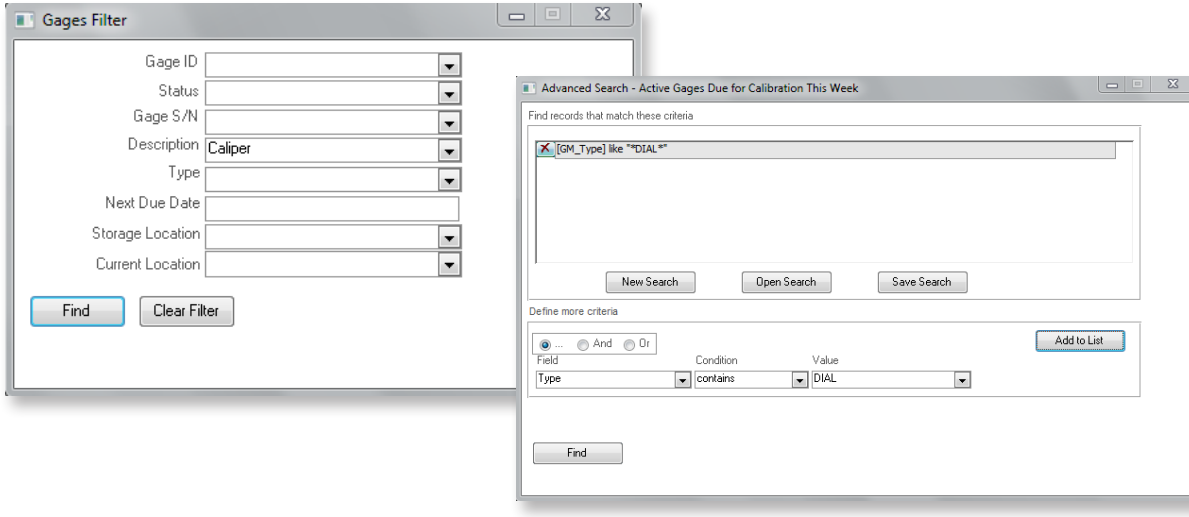


Since you haven't entered any gage records yet, the fields are blank.

To enter a new gage record, click the **New Record** button on your toolbar and then fill in the gage record with your data. Below are brief descriptions of the major fields in this screen, for comprehensive explanations of Gage Entry functionality, refer to the **Gages** section of the User Guide or the GAGEtrak Help System.

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

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

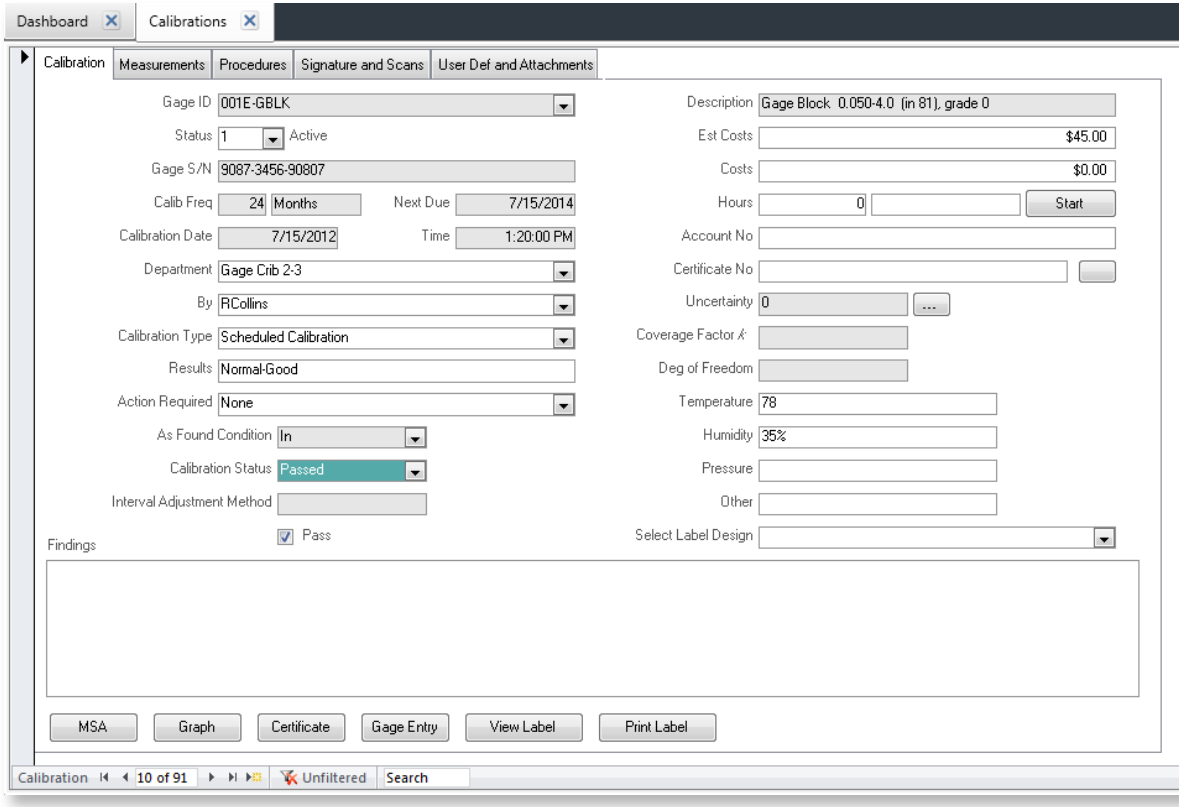


Chapter Seven
Entering Calibration Records

Introduction to Calibration Entry

The following information will get you started entering calibration records. For further information on gage record entry, calibration record entry and other functions of GAGEtrak, please refer to the GAGEtrak 7 User Guide.

To enter calibration records, select **Calibrations** from the Main Records menu. To create a new calibration record, click the **New Record** icon in the toolbar and then select the desired gage record from the **Gage ID** drop-down menu near the top of the window. Enter information into this screen (such as your department) and save the record; GAGEtrak automatically retrieves any standards you set up for the gage.



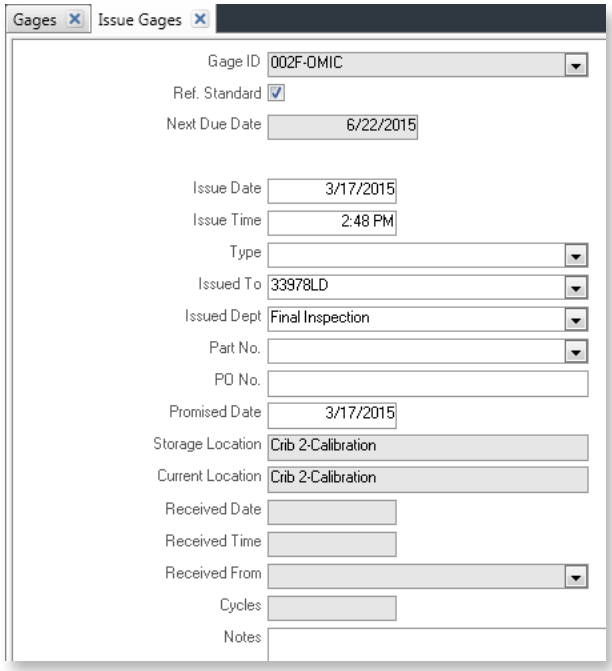
Chapter Eight
Issuing and Returning Gages

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

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

To issue or return gages, go to **Issue Gages** or **Return Gages** from the **Crib Management** menu.

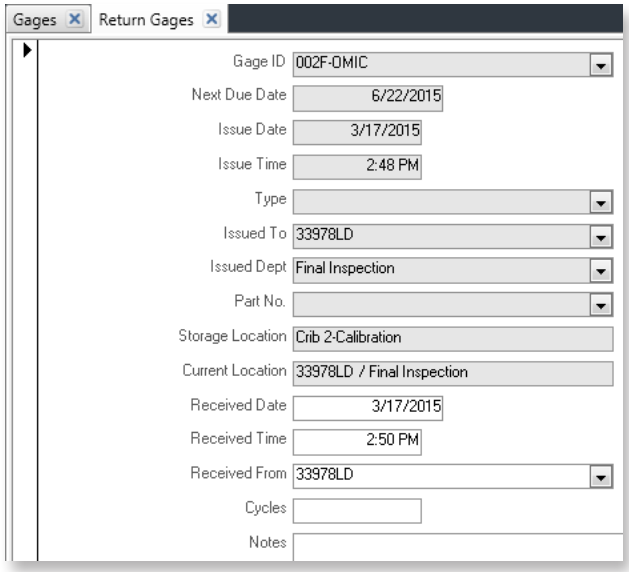
Issue Gages



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

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

Return Gages



The **Return Gages** form displays the issuance information at the top of the form; the return information fields are:

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

Chapter Nine
Products and Services

Training

One of the most important aspects of GAGEtrak implementation is proper, comprehensive training. All too often, training budgets are minimal or non-existent, which results in the accrual of more costs due to errors made by untrained personnel. Though GAGEtrak is easy to use, it's a robust solution with extensive functionality. Formal training ensures consistent data entry by all users and proper use of the software in daily operation, as it pertains to the users' specific roles in your calibration department. Software is simply a tool to be utilized in calibration management; the real investment lies with your employees and training them on the proper use of that tool. Without it, the software could become misused or unused, resulting in a reduction of ROI.

Three convenient and effective training options are available to fit your needs: on-site, two-day regional and Web training. Our team of experts will gladly advise you on the ideal comprehensive training package to fit your needs.

Other Professional Services

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

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

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

GAGEtrak Product Options

Report Viewer is an easy-to-use, stand-alone desktop utility that connects to your GAGEtrak database(s), allowing you to generate thorough reports to analyze and stay ahead of trends, forecast workloads, improve efficiency and minimize costs. 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. Ask about Report Viewer Pro which includes a report designer.

The Calibration Label Kit lets you create bar-coded labels for all of your equipment directly out of GAGEtrak. This compact Brother® printer comes complete with cables, label design software and everything else you'll need to get started. The harsh-environment labels are resistant to moisture, temperature extremes, industrial chemicals, UV and abrasion and are available in a variety of sizes and colors.

CyberSensor is an automated ambient temperature and humidity sensor that communicates with GAGEtrak via a USB connection. When a calibration is passed, the Temperature and Humidity fields within the GAGEtrak calibration record are automatically populated with CyberSensor data, making your calibration documentation even more complete. Improve efficiency and the reliability of your calibrations with CyberSensor's accurate temperature and relative humidity monitoring.

GAGEtrak's Total Calibration Solution (TCS) includes everything else you need for ISO 9000 and ISO/TS 16949 calibration compliance at a special package price. TCS includes GAGEtrak Software, a Calibration Label Kit, CalPro Calibration Procedures and an Annual Maintenance and Support Agreement (MA). Double your efficiency with TCS+ which includes all of the contents of TCS plus an additional GAGEtrak license and MA.

CalPro, an indispensable asset for any calibration department, is a database of step-by-step calibration procedures for more than sixty commonly used inspection gages, instruments and reference standards. Any or all CalPro procedures can be imported into GAGEtrak using the import utility provided or printed as hard copy from the DOC files included on the CalPro CD.