

Getting Started with

GAGetrak[®]

The World's Leading
Calibration Management Software



GAGetrak[®]

Getting Started Guide

GAGetrak Calibration Management Software



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Chapter One

Introduction

Overview

We're proud to welcome you to GAGetrak® 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 on your product CD will automatically install a copy of the *User's Manual* (including the *Quick Start Guide* and *System Administrator's Guide*) onto your Hard Drive; you can also choose to have the installer place an icon on your desktop. The *User's Manual* gives you detailed information about working with records and reports. The *System Administrator's Guide* provides comprehensive installation instructions (including client/server installations) and instructions for setting up and maintaining the program and database. The file will open with Adobe Acrobat Reader which must be installed on your computer and can be downloaded free from www.adobe.com.

This guide, **Getting Started with GAGetrak**, 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 will also provide 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. Now, 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. Your **Automatic Calibration Due Listing** report pops up on the screen, showing all of the calibrations that are due today. You print it out to use as a handy reference so that you can be sure that all of the 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.

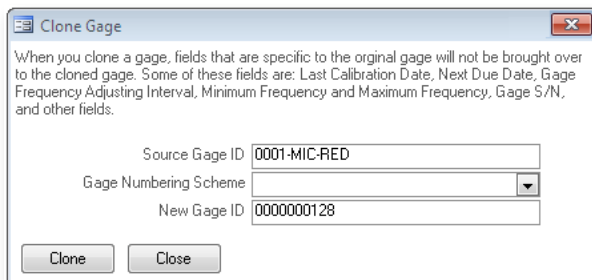
Along with each of these lists, you include the **Calibration Work Order** for each gage that needs to be calibrated. The **Calibration Work Order** includes a list of all of the **Calibration Standards** used, along with the minimum, nominal and maximum measurements for each standard. You've also been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

Now, you're ready to send your technicians off to work. One of them is going to a remote site and he'll be gone for several days, so you download his calibration information to his *PCM (Portable Calibration Module)* or *PDA (Personal Digital Assistant)*.

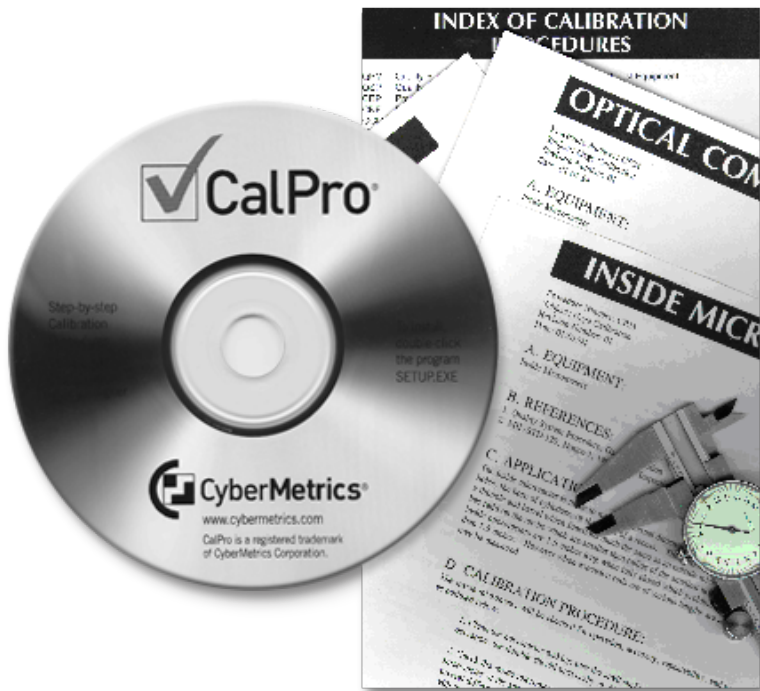


Now he'll be able to record all of the calibration results into the *PCM* or *PDA*. When he returns on Thursday, you'll upload the information he recorded and update the calibration records in your GAGetrak database.

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 9001:2000 and QS 9000 quality standards.

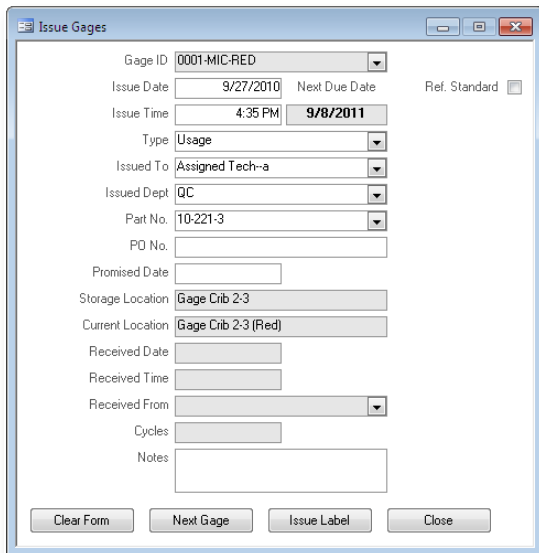


After lunch, you spend the afternoon calibrating some gages yourself. One of the gages you calibrate is the new electronic gage you received this morning. The output from this gage is transmitted through one of the serial ports on your PC. You're using the *Software Wedge* program to capture this real-time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

The screenshot displays the 'Calibration Entry' software window. The 'Calibration' tab is selected, showing various input fields for gage information. The 'Gage ID' is '0001-MIC-RED' and the 'Description' is 'Outside Micrometer 0-1 .0001'. The 'Calibration Status' is 'Passed'. A 'Print Label' button is visible at the bottom of the window. In the foreground, a Brother printer is shown printing a calibration label with the following text: CALIBRATED, DATE CALIBRATED: 09/29/2010, GAGE ID: 204491, SERIAL NO: 021099, and DATE CALIBRATED: 09/29/2010.

Now one of your lab technicians tells you that another department needs to borrow a gage. “May I just give it to them?” he asks. Your reply? “No, we need to provide traceability 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. You’ve also ensured that you’ll have traceability for this gage.



The screenshot shows a software window titled "Issue Gages". The form contains the following fields and values:

- Gage ID: 0001-MIC-RED
- Issue Date: 9/27/2010
- Next Due Date: (empty)
- Ref. Standard:
- Issue Time: 4:35 PM
- Issue Date (dropdown): 9/8/2011
- Type: Usage
- Issued To: Assigned Tech--a
- Issued Dept: QC
- Part No.: 10-221-3
- PD No.: (empty)
- Promised Date: (empty)
- Storage Location: Gage Crib 2-3
- Current Location: Gage Crib 2-3 (Red)
- Received Date: (empty)
- Received Time: (empty)
- Received From: (empty)
- Cycles: (empty)
- Notes: (empty)

At the bottom of the window are four buttons: "Clear Form", "Next Gage", "Issue Label", and "Close".

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. Let's list these benefits by the program features they used:

1. You easily and quickly generated an accurate Calibration Schedule.
2. You also easily generated an Automatic Calibration Due Listing report that told you what you had to do 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 PDA gave the technician who was going off-site a faster, less cumbersome way of recording his calibration information. Later, you will easily be able to upload this information into your database.
4. The Clone Gage feature also 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.
5. The Software Wedge program instantly inserted your calibration measurements into GAGetrak; you didn't have to enter anything.
6. CalPro gave you proven calibration procedures that were already researched and documented.
7. The Calibration Label Kit helped you speedily print durable, easy-to-read calibration labels for each gage that you calibrated.
8. 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.
9. The Bar Code Reader provided for fast, easy and accurate entry of issued and returned gages and even updated their current information directly into GAGetrak.
10. 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.
11. Finally, GAGetrak's features and optional accessories helped you with one extremely important task - ensuring your company's compliance with ISO 9001:2000 and QS 9000.

Chapter Three

Installing & Running GAGetrak

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 your *System Administrator's Guide* and *User's Manual*, which are located on your product CD.

Program Requirements

Workstation Requirements

- Microsoft Windows XP, Vista or Windows 7
- Hard disk with 150 MB of free space for program files, plus 75-100 MB for a typical database
- 512 MB RAM minimum required; 1 GB recommended
- Pentium 1.4 MHz CPU required; Pentium 2.8 GHz or higher recommended
- SVGA monitor at 1024 x 768 resolution or higher
- Mouse or compatible pointing device
- Ink jet, bubble jet or laser printer for printing reports

Network Requirements

Optional: This section applies only if the data file will be shared over the network or will be part of a regular network backup.

- Network folder with full rights for each GAGetrak user
- 100 Megabit LAN

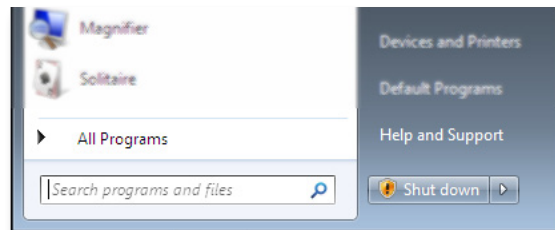
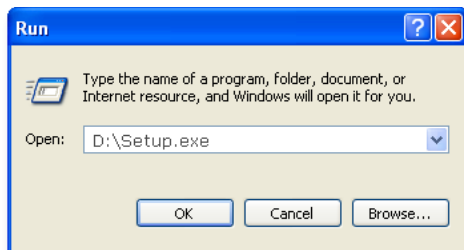
Installing GAGetrak

The *System Administrator's 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 CD-ROM, follow these instructions:

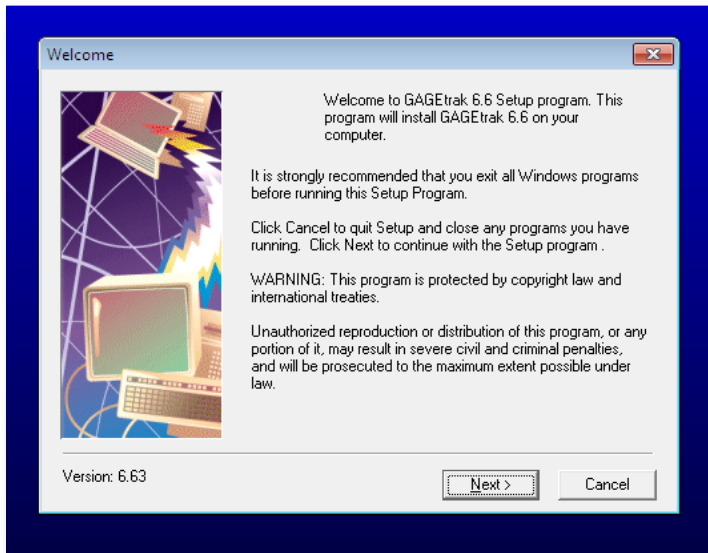
1. Click the Windows **Start** button and select the **Run** or **Search...** command.



2. Place the GAGetrak CD into your CD-ROM drive [D], (the drive may vary depending on your system setup) and enter **D:\SETUP.EXE** in the **Open** field in the **Run** window or the **Search programs and files** field in Windows 7.



3. Follow the GAGetrak installation instructions on your screen.

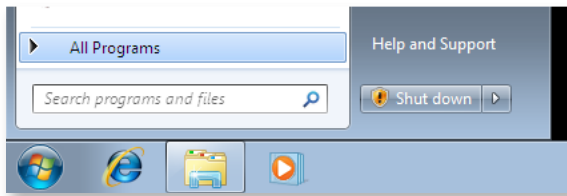


Running GAGetrak

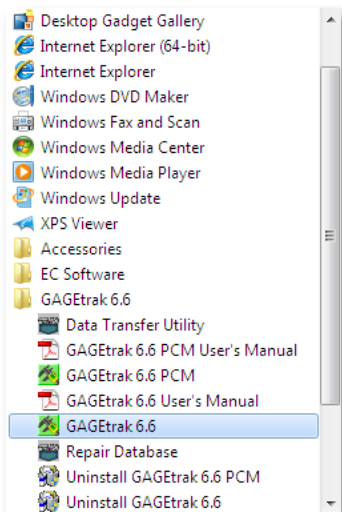
1. Click the **Start** button.



2. Select **All Programs**.



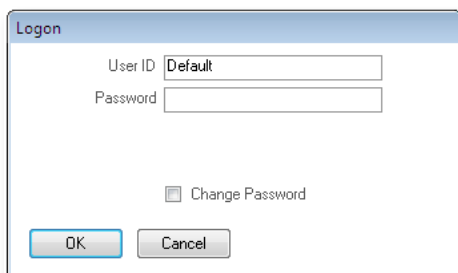
3. Select the **Program** group and then choose the GAGetrak option under the GAGetrak program and the main menu will appear; or double click the GAGetrak icon that was placed on the desktop during installation.



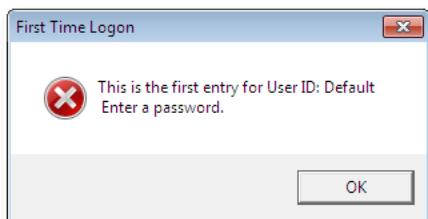
Logon

GAGetrak requires users to log in if you have installed the Standard application and activated security through **Settings -> Security** or if you have chosen to install the 21 CFR Compliant Application (in which case security is automatically activated). The **Logon** window shown below will appear. Enter your User ID and Password in the appropriate fields and then click **OK** to log in.

Note: The 21 CFR Part 11 Compliant version of GAGetrak automatically activates security. Therefore, when GAGetrak is launched for the first time, you must log in. Since your users and groups have not been setup, a logon User ID of “Default” is provided so you can log in. Once you have logged in, set up your users and groups first, then delete the User ID Default. Also, the User ID is case insensitive whereas the password is case sensitive.

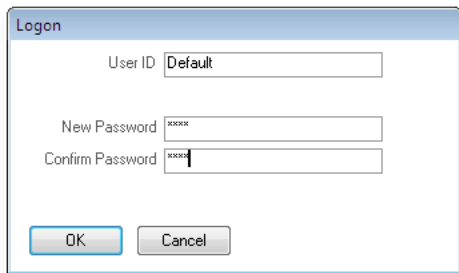


The first time you log in to GAGetrak, you will see this message:



Click **OK**. Enter your User ID, then enter a password in the **New Password** field and the same password in the **Confirm Password** field. GAGetrak will require you to enter this password the next time you log in.

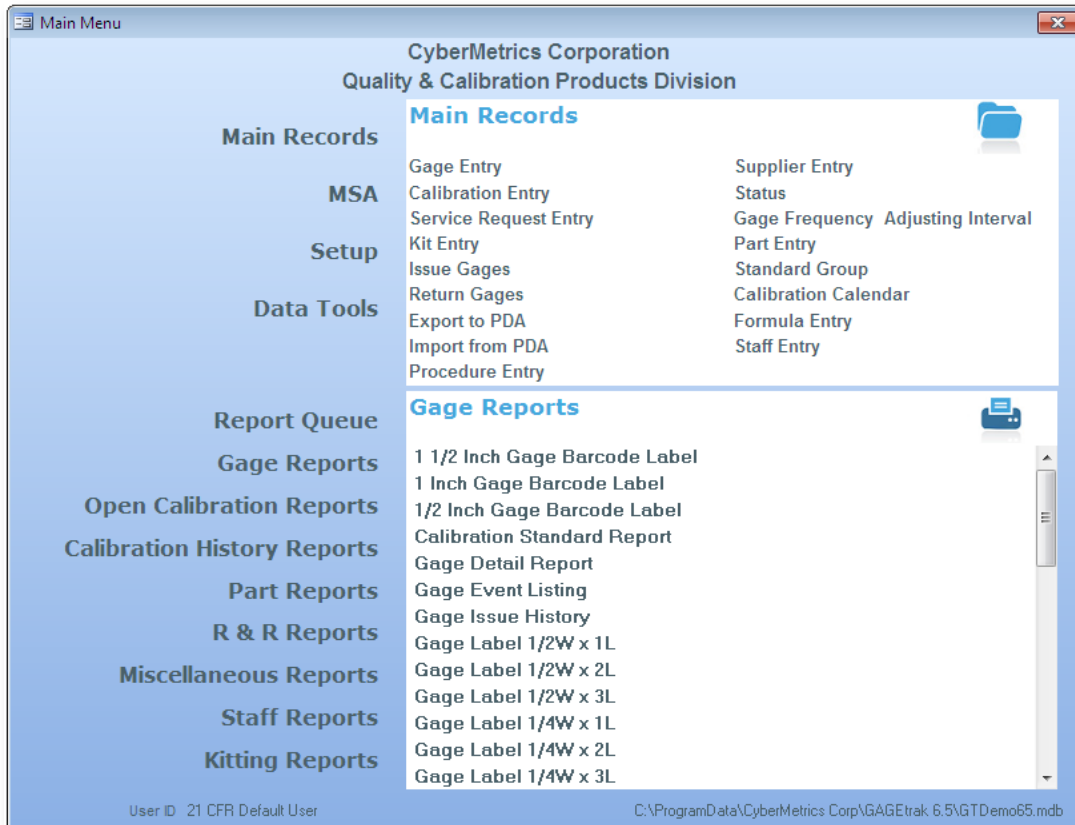
When you wish to change your password, click the checkbox labeled **Change Password** in the **Logon** window. GAGetrak will require you to enter your old password, then enter and confirm your new password.



The image shows a dialog box titled "Logon". It contains three text input fields: "User ID" with the text "Default", "New Password" with "xxxxx", and "Confirm Password" with "xxxxx". Below the fields are two buttons: "OK" and "Cancel".

Main Menu

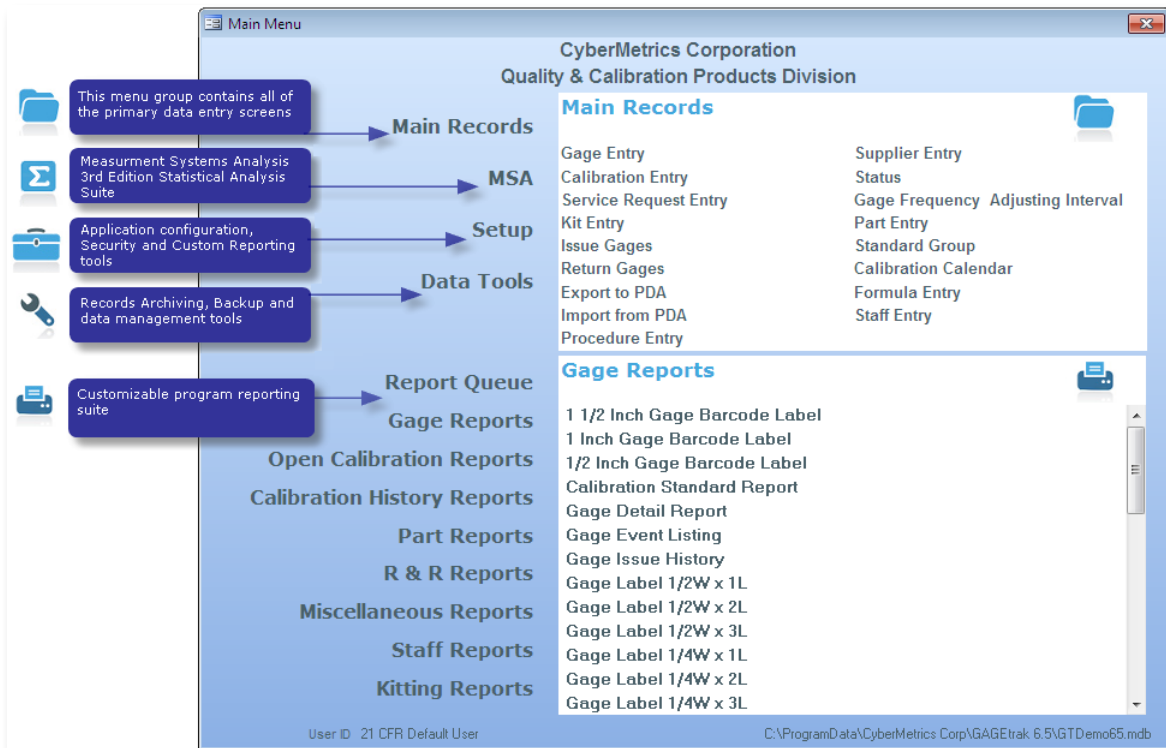
Now you can see the entire main menu. Note that the name of the currently logged-in user is displayed in the lower left corner. The full path to the attached database file is displayed in the lower right corner.



For a complete list of menu options, consult your *GAGETrak User's Guide*.

Organization of GAGetrak's Menu

GAGetrak's new menu interface is easy to learn and use, with clean, clear graphics and an intuitive approach. By selecting a different Menu Group on the left, you are presented with different action items to the right from which to choose. This menu system puts every GAGetrak feature right at your fingertips without excessive navigation requirements.



Chapter Four

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 full copy of the *User's Manual* located on your product CD.

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

Gage Entry

Information | Schedule | Standards | History | Procedures | Parts | Additional | Issuances

Gage ID:

Status: 1 Active

Ref. Standard: NIST No.:

Gage S/N:

Asset No.:

Model No.:

Type:

Unit of Meas:

Drawing No.:

Drawing Date:

Change Level:

Change Date:

Description:

Storage Location:

Current Location:

Service Date:

Retirement Date:

Supplier Code:

Cost: \$0.00

Purchase Date:

User Defined:

Manufacturer:

Owner:

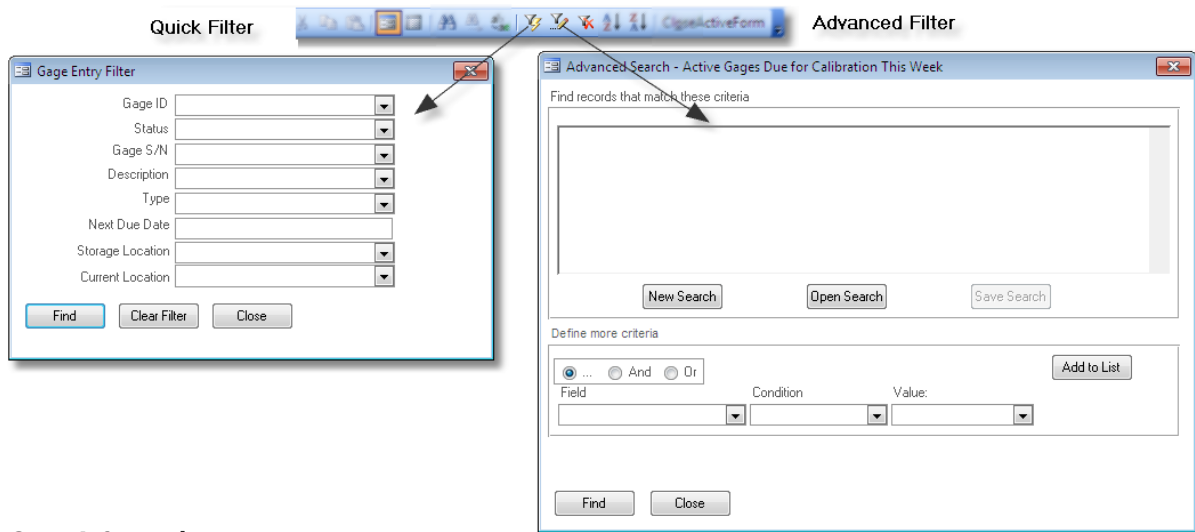
Notes:

Issue/Return | Clone Gage | Graph | Calibration | Attach Standards | Attach Procedures

Record: 103 of 103

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

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.



Gage Information

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 **Gage Entry** section of the *User's Manual*.

Field/Button Name	Description
Gage ID	<p>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.</p> <p>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's Manual.</p> <p>In addition, do not use "or" when filtering features are used, as the application may error.</p>
Status	<p>Use the list box to pick from available choices (such as Active or In-Active). This field is required.</p> <p>Tip: If the Status field is not set to Active, the Calibration Due reports will skip over the gage.</p>
Ref. Standard	<p>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).</p>
NIST No.	<p>If this record is for a reference standard, enter its NIST number here.</p>


Chapter Five

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 full copy of the *User's Manual* located on your product CD.

To enter calibration records, select **Calibration Entry** from the **Calibration** menu. A window similar to the following will appear.

To create a new calibration record, click on the **New Record** button , then select the desired gage record from the **Gage ID** drop-down menu near the top of the window. After you save the record by entering information into this screen (such as your department), GAGetrak automatically retrieves any standards you set up for the gage.

The major fields in the calibration record window are described in full in your electronic *GAGetrak User's Manual* which can be found in your GAGetrak Program Group or on your product CD.

Chapter Six

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 Gage Entry's 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 the **Main Records** menu and click on **Issue Gages** or **Return Gages** as required.

Issue Gages

When you click **Issue Gages**, this screen appears:

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 issue; 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 Gage Entry -> Authorized Person.
Issued Dept	Use this field to track the department or job number that will use the gage.
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

When you click **Return Gages**, this screen appears:

The screenshot shows a window titled "Return Gages" with the following fields and values:

- Gage ID: 0001-MIC-RED
- Issue Date: 9/29/2010
- Next Due Date: (empty)
- Issue Time: 4:03 PM
- (Date field): 9/8/2011
- Type: (empty)
- Issued To: (empty)
- Issued Dept: (empty)
- Part No.: (empty)
- Storage Location: Gage Crib 2-3
- Current Location: (empty)
- Received Date: 9/29/2010
- Received Time: 4:03 PM
- Received From: (empty)
- Cycles: (empty)
- Notes: (empty)

Buttons at the bottom: Clear Form, Next Gage, Close.

The **Return Gages** fields are included on the lower half of the **Issue Gages** form and are as follows:

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. This is an editable field.
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 Seven

Conclusion

We hope that you're more familiar with GAGetrak now and that this introductory guide has helped you understand more about how GAGetrak can help you organize and document your gage and calibration records. Please consult your product's *User's Manual* and *System Administrator's Guide* for detailed instructions about other entry screens, reports, program setup options and other product features.

If you have any questions about or problems with your software, please contact CyberMetrics Technical Support at **(480) 922-7300**.

Appendix

Options

GAGetrak Gage Calibration Software Options

These products are also available with select software solutions.

GAGetrak SQL Server

SQL Server version of GAGetrak improves speed and efficiency of large databases while providing greater data security.

Validation Kit

Establishes and documents FDA validation of your GAGetrak software.

Custom Toolkit

Customize GAGetrak to meet your needs; intended for developers and clients requiring source code. Available in the USA only.

CalPro Step-by-step Calibration Procedures

This complete database of step-by-step calibration procedures is designed for use with GAGetrak.

GAGetrak Training

This hands-on training workshop takes you step by step through planning, preparation, setup and successful operation of GAGetrak.

GAGetrak Web Reporter

Generate GAGetrak reports anytime, anywhere, using your Web browser.

GAGetrak Web Calibration Entry

Enter calibrations through your Web browser.

GAGetrak Enterprise Reporter

Gather data and view reports from multiple GAGetrak databases in different locations throughout your organization.

GAGetrak BEACON

Improve email reliability with GAGetrak BEACON; ensure your technicians get their calibration email notices on time.

GAGetrak Portable Calibration Solution

Perform calibrations in the field. Export data from GAGetrak to a netbook or laptop, view procedures, print certificates and generate calibration labels.

GAGetrak PDA Software

Perform calibrations in the field with your PDA handheld computer, then transfer the data back to your GAGetrak database.

GAGetrak Total Calibration Solution

This option provides everything you need for ISO/QS 9000 calibration compliance at a special package price.

Calibration Label Kit

Print durable laminated calibration labels directly from GAGetrak with this compact, convenient printer.

GAGetrak CyberSensor®

The CyberSensor senses and captures both temperature and humidity through your PC's USB port.

GAGetrak[®]

Calibration Management Software

Congratulations! You are about to delve into the world of GAGetrak[®], the world's leading calibration management software solution.

Contact us today to learn how these helpful add-on products can maximize the potential of your GAGetrak software:

- Calibration Label Kit
- CalPro[®] Step-by-Step Calibration Procedures
- Hand-held PC /PDA Software
- Portable Calibration Module for Netbooks and Laptops
- GAGetrak Portable Calibration Solution
- CyberSensor[®] Captures Temperature & Humidity via USB
- GAGetrak SQL Server
- Web Calibration
- Web Reporter
- Web Enterprise Reporter
- Custom Toolkit
- Validation Kit
- English, Spanish and French Editions
- Software Support and Maintenance Agreement
- Regional, Onsite and Web-based Training Classes



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