

Recall Database 5.2



USER MANUAL

www.vantek-nem.com

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Basic Features

The Recall Database does exactly what its name suggests; it “recalls” information recorded by Calspex. The Recall Database does more than merely recall, however; it organizes information into manageable categories, tables, and easy-to-read files.

The Toolbar and Tool Tips

The toolbar grants you quick and easy access to some of the Recall Database’s most popular features.



Figure 1: Recall Database Toolbar

To learn the function of a particular button, simply rest your cursor on the button until the tool tip appears, providing you with a short description.

The Menu Bar

The menu bar appears at the top of your screen and contains all the options available to you in the toolbar, and many more.

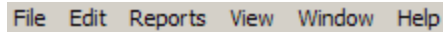


Figure 2: Recall Database Main Menu

When you click on any of the words in the menu bar, a pop- up menu appears, providing you with multiple options from which to choose.

The letters you see underlined in the main menu and pop-up menus inform you of the various shortcuts with which they can be accessed.

Reports

Reports (or tables) are a basic feature of the Recall Database. The software enables you to generate a multitude of different reports based on criteria of your choice. The tables produced are versatile, in that they can be customized to your liking.

Control	Name	Mfg	Model	HLocation
CAL-7878	Caliper 6"	Starrett	Dial	Gage Crib #2
CAL-9090	Caliper 6"	Starrett	Dial	Gage Crib #1
GB-0003	Gage Block(s)	Mitutoyo	88 pc. English Set	Calibration Lab
GB-1000	Gage Block Set	Mitutoyo	Rectangular - Grade 2 (Steel)	Calibration Lab
GP-20390	Gage Pins	Mitutoyo	.250-.500"	ABC Company (Out

Figure 3: Inventory List

Please read the sections below for more information about manipulating the structure and appearance of tables in the Recall Database.

Moving Columns

The Recall Database allows you to determine the order in which columns appear in a table. To move a column, simply click and drag the top of the column (the cell displaying the field name) to the desired location.


This feature is used for printing purposes; modifications are not saved from one table to another.

Re-Sizing Columns

You can also determine the size of columns in a table. Simply move your cursor over a column break at the top of the table until you see the double-headed arrow. Then click and drag the column until it is the desired width.

Column widths are saved with the field name. New widths therefore take effect in all reports generated.

Choosing Visible Fields

The Recall Database allows you to determine which fields are visible in a table. Simply click the Field Properties button in the button bar.  Notice you have retrieved the Field Properties window.

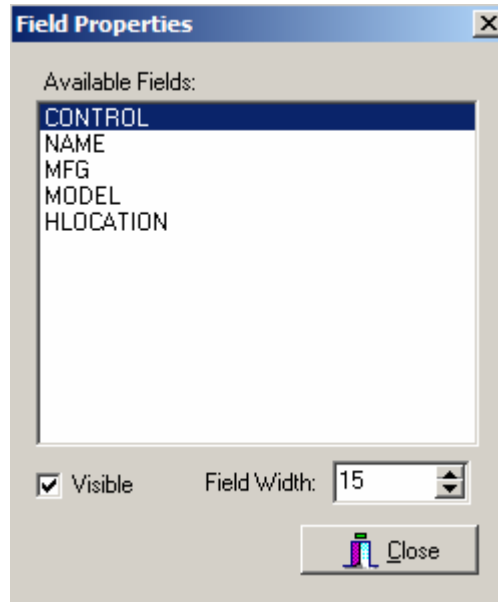



Figure 4: Field Properties Window

- ✓ To make a field visible, simply click on it and make sure the Visible box is checked.
- ✓ To make a field invisible, simply click on it and make sure the Visible box is un-checked.

You can also determine the number of characters able to fit in each column. Simply type the desired number of characters in the Field Width field.

Changing a Report' Font


You are also free to determine the font displayed in a table itself. To customize a table's font, simply click the Font button in the button bar. 

When presented with the Font window, simply select a font from the options provided. For more information about customizing the fonts of a table, including the font of printed reports, please refer to the section entitled The Reports Tab, below.

Printing a Report

The Recall Database allows you to print directly from a table. It is advisable, however, to preview the report before printing it.

To preview a report:

Step 1: Click the Print Preview button in the button bar.  Notice you have retrieved the Report (Print Preview) window.

Step 2: Use the scroll bar to view the first page of the report.

Step 3: Click the Print button if you want to print the report immediately. Otherwise, click the Close button.


To print a report:

Step 1: Click the Print button in the table's button bar. 

Step 2: When presented with the Print window, specify the number of copies you want to print by clicking inside the Copies field and entering a number. Then click OK or press the Enter key.

You can also access the traditional Windows Print Setup feature. Simply click the File in the main menu and select Print Setup.


Saving a Report

Saving a table is easy. Simply click the Save button in the button bar. 

When prompted, give the report a filename and click OK.

Files are saved as tab delimited text files—that is, the table is converted to a text file. Fields are then separated by tabs.

Copying a Table to the Clipboard

To copy a table, simply click the Copy to Clipboard button. 

Gages Window

The Gages window displays information about all the gages you've calibrated in Calspex and updated to Recall. Here you can view general gage information, gage history, and gage tracking in a series of gage records. Think of the gage records as stacked on the screen. Only the gage record on top of the collection is visible at a given time.

The Gages window consists of three tabs:

- ✓ The Gage Info tab
- ✓ The Cal History tab
- ✓ The Tracking tab
- ✓ The All Gages tab

The Gage Info Tab

The Gage Info tab is the first tab in the Gages window, and it is the one which is active when you first call up the Recall Database. Here you can view general information about the gage and the gage status.



By clicking the Wide View On/Off button, you can view more or less information, respectively.

The screenshot shows the 'Gages' window with the following details:

- Control #:** CAL-25890
- 556 Gages** (button)
- Gage Status:** In Service
- Recall by:** Date
- Tabbed Interface:** Gage Info (selected), Cal History, Tracking, All Gages
- Gage Info Fields:**
 - Gage Desc: Caliper 12"
 - Manufacturer: Mitutoyo
 - Model: 551-241-10 Digimatic
 - Serial #: 1108392
 - Location: Calibration Lab
 - Gage Type: Caliper
 - GDF Filename: \GDF\CALIPERI.GDF
- Navigation Buttons:** Current Location, Recall Info, and a set of navigation arrows (Home, Left, Right, End, Refresh, Refresh).
- Find Gages:** Find Gages button
- Wide View On/Off:** Wide View On/Off button
- Quick Find Control #:** Quick Find Control #: [text input field]

Figure 5: Gage Info Tab

What Is the Gage Info Tab Showing Me?

Gage Info Tab	
Field	Description
Control	Displays the control number of the gage and informs you of the total number of records in the database.
Status	Displays the current status of the gage. You can change the status by clicking the drop-down box and selecting from the options provided.
Recall By	Shows the type of recalibration interval used on this gage. The calibration increment will appear when using Usage (hourly) based recalibrations and parts based recalibration.
Gage Desc Manufacturer Model Serial # Location	Provides you with manufacturer and model information, serial number, and location of the gage. <i>This information can be modified. Simply tab to the desired field and alter the information as you like. Then click the check mark  button to save your changes.</i>
Gage Type	Displays the type of gage.
GDF Filename	Displays the filename of the Gage Type used to define the gage.
Current Location	Clicking on this button displays the current whereabouts of the gage, according to the gage tracking database.
Arrow buttons	Allows you to manipulate the records in the Gage window. Use the arrow buttons to search through your gage records.
Refresh button: 	Allows you to refresh the Gages window. If, for instance, several people are modifying gage records at a given time, the Refresh button allows you to update your window and view the most current information.
Find Gages	Allows you to search for a given gage record. This method of searching for records is valuable if you have a large number of gage records. For more information about this feature, please refer to the section Finding Records.
Recall Info	Displays the current usage information and recalibration information about this gage. If you are using usage based recalibrations, it will show the current status (number of hours or number of parts), or will show the next calibration due date if using date based recalibrations.
Wide View On/Off	Allows you to increase or decrease the amount of information visible in the Gages window (Company Information).

Gage Info Tab	
Field	Description
Company Street1 Street2 City Contact Department	Displays the address and administrative information of the company to which the gage belongs. <i>This information can be modified.</i> <i>Simply tab to the desired field and alter the information as you like. Then click the check mark button <input checked="" type="checkbox"/> to you're your changes.</i>
Quick Find Control #	Allows you to retrieve a specific gage record simply by entering its control number.

The Cal History Tab

The Cal History tab is the second tab in the Gages window. Here you can view each instance of calibration for a given gage. Calibrations are listed in chronological order.

By clicking the Wide View On/Off button, you can view more or less information, respectively.

Gages

Control # **CAL-00201** **556 Gages**

Gage Status **In Service** Recall by: **Date**

Gage Info | **Cal History** | Tracking | All Gages

CONTROL	CALDATE	NEXTDATE	DOCNO	CERTBY	PASS	FILENAME
▶ CAL-00201	2/10/2002	8/10/2002	18	Metrologist #1	T	\Data\1k\W18.CAL
CAL-00201	8/10/2002	2/10/2003	61	Metrologist #1	T	\Data\1k\W61.CAL
CAL-00201	2/10/2003	8/10/2003	126	Metrologist #1	T	\Data\1k\W126.CAL
CAL-00201	8/10/2003	2/10/2004	303	Metrologist #1	T	\Data\1k\W303.CAL
CAL-00201	2/10/2004	8/10/2004	664	Metrologist #1	T	\Data\1k\W664.CAL
CAL-00201	8/10/2004	2/10/2005	2115	Metrologist #1	T	\Data\1k\W2115.CAL

Quick Find Control #:

Figure 6: Cal History Tab

What Is the Cal History Tab Showing Me?

Cal History Tab	
Field	Description
CALDATE	Displays the date(s) the gage was calibrated.
NEXTDATE	Displays the next calibration date for a given calibration.
DOCNO	Displays the document number assigned to that calibration report.
CERTBY	Displays the user that created the calibration report.
PASS	Indicates the pass/fail status of the gage (Either T or F).
FILENAME	Displays the filename of the calibration report.

The Tracking Tab

The Tracking tab is the third tab in the Gages window. Here you can view all gage tracking entries made for a given gage.

By clicking the Wide View On/Off button, you can view more or less information, respectively.

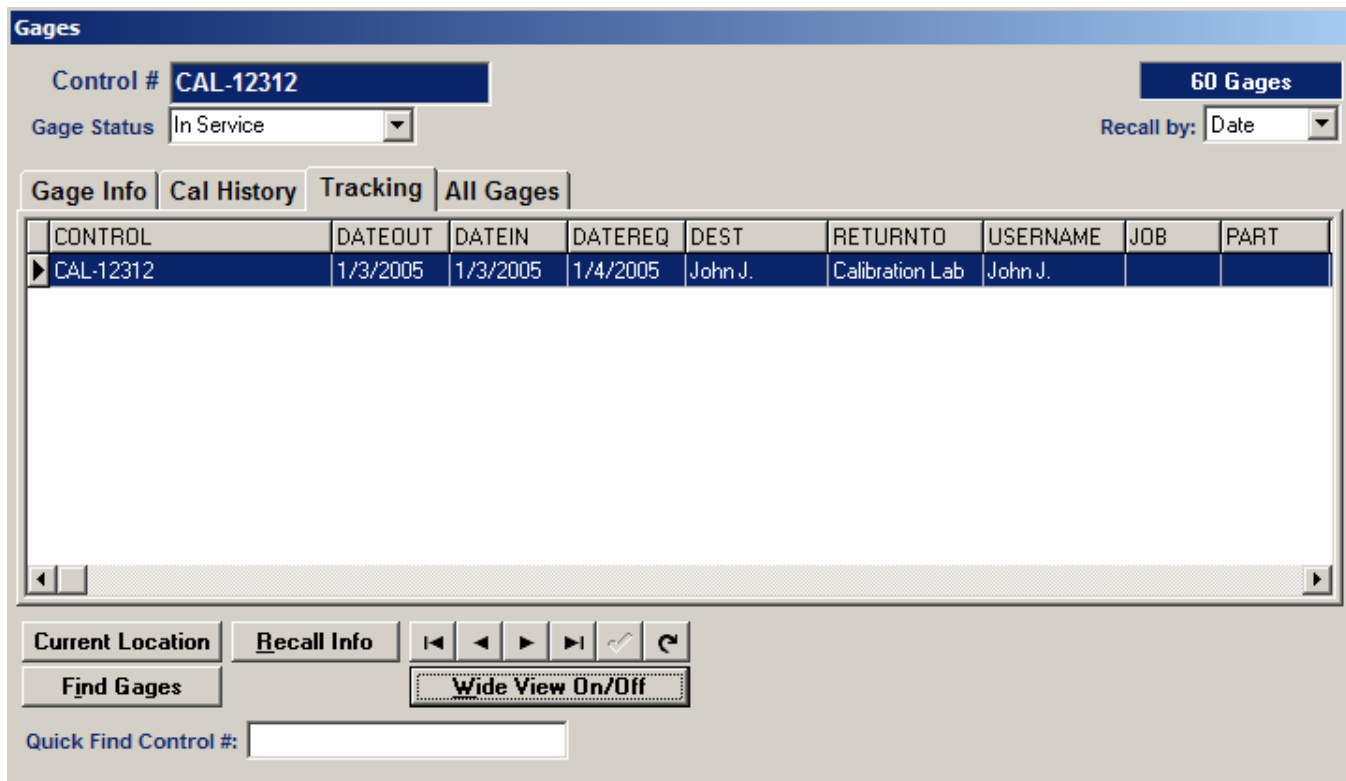


Figure 7: Tracking Tab

What Is the Tracking Tab Showing Me?

Tracking Tab	
Field	Description
CONTROL	Displays the gage's control number.
DATEOUT	Displays the date the gage was checked out. (The date format is the same as that specified in your Windows settings.)
DATEIN	Displays the date the gage was checked in. (The date format is the same as that specified in your Windows settings.)
DATEREQ	Displays the date the gage must be checked back in. (The date format is the same as that specified in your Windows settings.)
DEST	Displays the current destination of the gage.
RETURNTO	Displays the location to which the gage is returned.
USERNAME	Displays the name of the person checking out the gage.
JOB	Displays a description of the job performed by the user with the gage.
PART	Displays a description of the gage part being inspected or manufactured.
MACHINE	Displays the name of a machine used during the inspection or manufacturing of the part.
OP	Displays a description of any operation performed with gage.

The All Gages Tab

The All Gages tab is the fourth tab in the Gages window. Here you can view all gages in the database. For more information, please refer to the section Displaying All Gages.

By clicking the Wide View On/Off button, you can view more or less information, respectively.

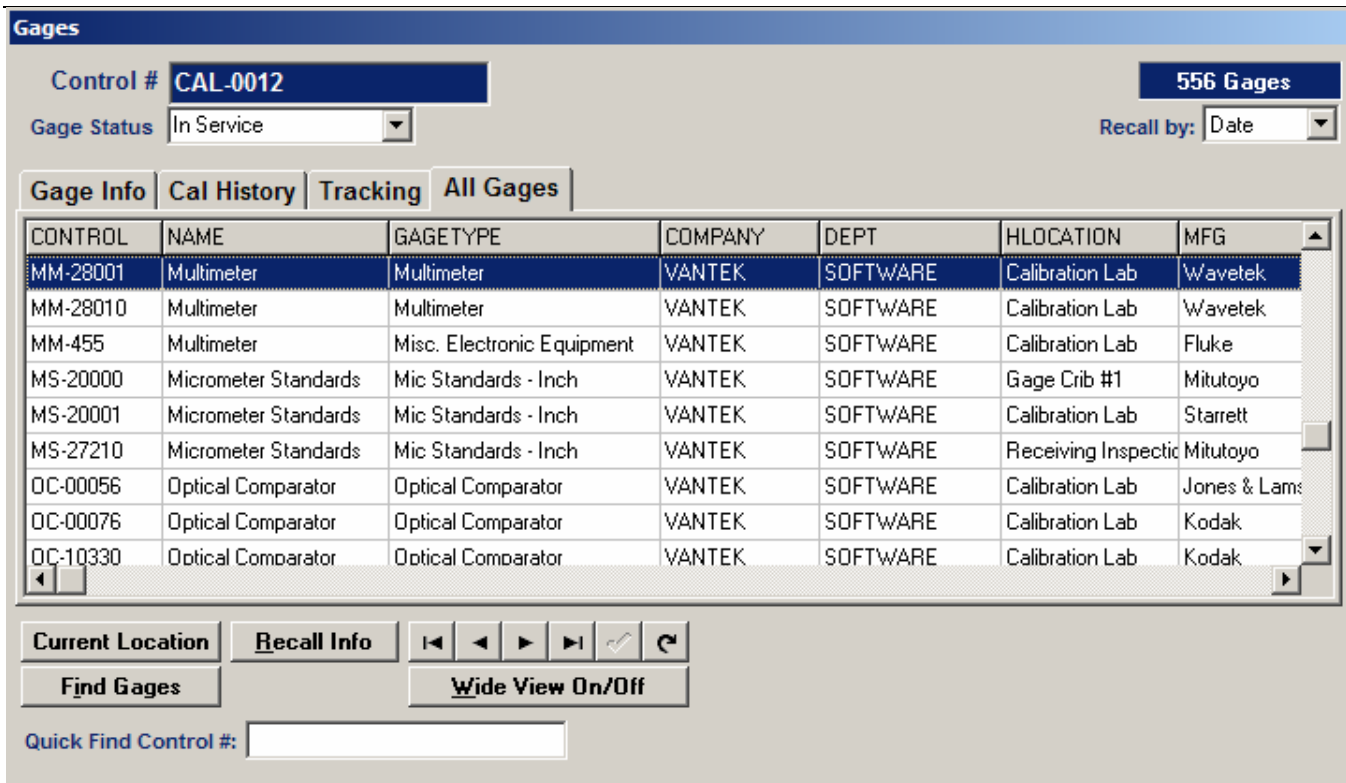


Figure 8: All Gages Tab

What Is the All Gages Tab Showing Me?

Table Tab	
Field	Description
CONTROL	Displays the gage's control number.
NAME	Displays the gage's name.
MFG	Displays the gage manufacturer.
MODEL	Displays the gage model.
SN	Displays the gage's serial numbers.
HLOCATION	Displays the gage's location.
DFILENAME	Displays the filename of the gage record.
COMPANY	Displays the gage's company.
STREET1 STREET2 CITY STATE ZIP	Displays the address of the company which owns the gage.
CONTACT	Displays the name of the person to contact regarding the gage.
DEPT	Displays the gage's department.
STATUS	Displays the gage's status.

Records in the Gages Window

You can add, edit, delete, sort, and find records in the Recall Database. Keep in mind, however, that these actions do not affect the original calibration reports.

Adding Records

Some gages never require calibration and therefore never need be recorded in Calspex. The Recall Database recognizes this and allows you to record these gages independently.

To add a new gage record to the database:

- Step 1:** Click the Gage Info tab in the Gages window.
- Step 2:** Click Edit in the main menu and select New Gage.
- Step 3:** When prompted, enter the gage's control number. Notice you have retrieved a blank record in the Gage Info tab.
- Step 4:** Enter the appropriate gage and company information.


Editing Records

The Recall Database allows you to modify gage records displayed in the Gages window.

To edit a gage record:

- Step 1:** Click the Gage Info tab in the Gages window.
- Step 2:** Simply tab to the desired fields and modify the information as you like.

You cannot alter information that is grayed out on the screen.

- Step 3:** Click the check mark button. 

Deleting Records

There is only one way you can delete a gage record from the gages window:

- ✓ Display the gage you want to delete in the Gage Info tab. Then click Edit in the main menu and select Delete Gage.

The Recall Database also allows you to delete gages with a specific status.


- Step 1:** Click Edit in the main menu and select Purge Gages w/ Status.
- Step 2:** When prompted, enter the desired status and click OK.

Finding Records


The Recall Database provides you with several options when it comes to finding a specific gage record. The simplest way to find a gage record is to use the arrow buttons provided in the Gages window.

If you know the gage's control number or calibration document number, the Recall Database provides you two methods to easily target a specific record.

Using a control number:

- Step 1:** Click the first button in the toolbar,  or click Reports in the main menu and select Find a Control #.
- Step 2:** When prompted, enter the control number. The Gages window then displays the appropriate gage record.

Using a document number:

- Step 1:** Click the second button in the toolbar,  or click Reports in the main menu and select Find a Document #.

Step 2: When prompted, enter the document number. The Gages window then displays the appropriate gage record.

If you do not know the gage's control number or calibration document number, there are other more involved processes for finding a specific gage record. The Find Gage feature and the Query Form enable you to specify your own criteria when searching for a given gage.

Using the Find Feature

The find feature allows you to search for certain word or number patterns in various fields of a gage record.

To use Find:

Step 1: Click the Find Gage button in the Gages window. Notice you have retrieved the Find window.

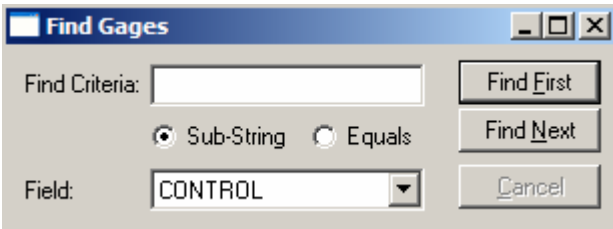


Figure 9: Find Window

Step 2: Enter the desired word pattern in the Find Criteria field. Example: Micrometer.

Step 3: Specify whether you want the Recall Database to look for exact or near matches of your word pattern by clicking either Sub-String or Equals radio buttons.


Step 4: Click the Field drop-down box and tell the Recall Database where to look for your word pattern by clicking on the desired field.

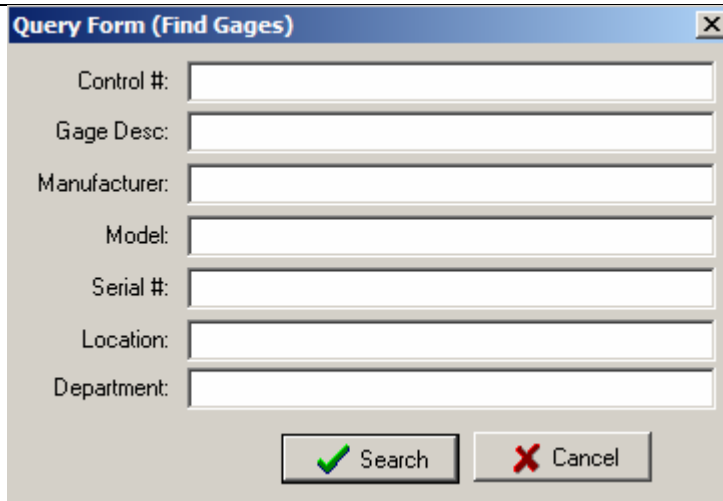
Step 5: Click the Find First button. Notice that in the Gages window, a gage record containing the specified word pattern appears. Click the Find Next button to view the other records that met your criteria.

Using the Query Form

Like the Find feature, the Query Form allows you to find gage records according to specific criteria. The Query Form, however, is somewhat different in that it allows you to search for gage records according to multiple criteria. For instance, if you know the gage you're looking for is in a specific location, and if you know its manufacturer, you can conduct a query based upon both these criteria.

To use the Query Form:

Step 1: Click the sixth button in the toolbar,  or click Reports in the main menu and select Query Form. Notice you have retrieved the Query Form window.



Query Form (Find Gages)

Control #:

Gage Desc:

Manufacturer:

Model:

Serial #:

Location:

Department:

Figure 10: Query Form

- Step 2:** Enter any known information about the gage—be it a control number, a location, a manufacturer—in the appropriate fields.
- Step 3:** Click the Search button. Notice you have retrieved a new Gages window. This new window contains only those records that match the specified criteria. Use the arrow buttons to find the desired record.

Preferences

Customizing the Recall Database entails creating your own preferred defaults—that is, ensuring that your personal preferences are retained and given priority whenever you use the program.

Once you select a preference for a certain feature, your preference becomes the default.

To customize the Recall Database, you must retrieve Preferences:

Step 1: Click Edit in the main menu and select Preferences.

Step 2: Enter your password when prompted.

If you have not previously customized the Recall Database, use the default password, ADS, until you are able to select your own.

Notice you have retrieved the Recall Database Preferences window, consisting of six tabs:

- ✓ The System Tab
- ✓ The Reports Tab
- ✓ The Locations Tab
- ✓ The Users Tab
- ✓ The Tracking Tab
- ✓ Gage Cards Tab

The System Tab

The System tab allows you to determine the Recall Database's startup database path. It also allows you to customize the Due Calibrations table.

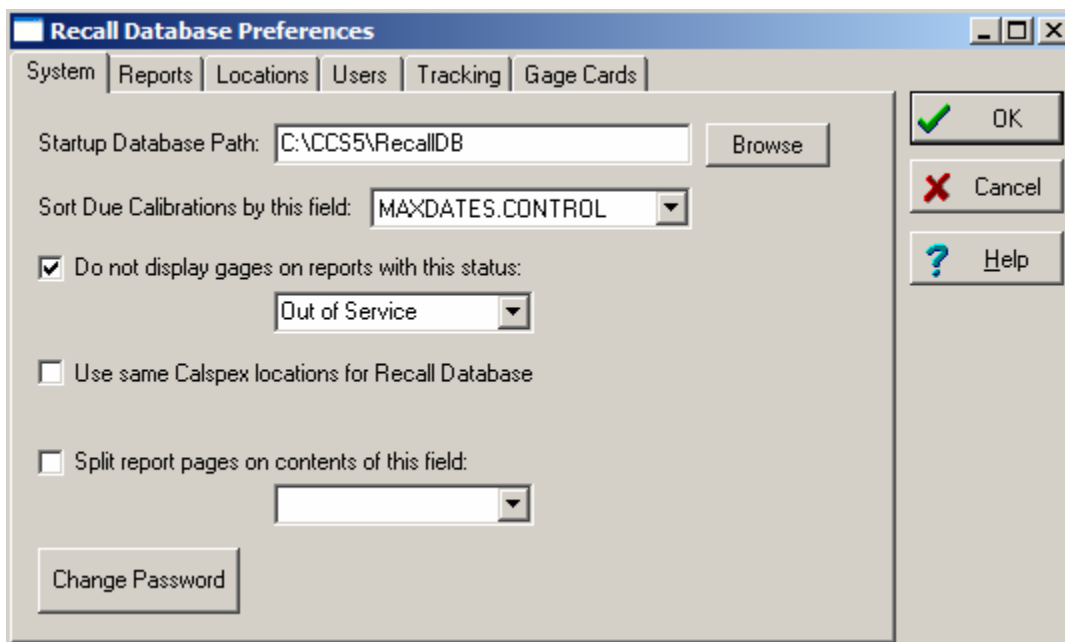


Figure 11: System Tab

To establish system preferences:

Step 1: If you want to change the Recall Database's path location, click inside the Startup Database Path and enter the desired path.

Step 2: Determine the manner in which due calibrations are sorted in the Due Calibrations table by clicking on the Due Cals Report Sort Order drop-down box and selecting from the options provided.

- ✓ MAXDATES.CONTROL:
- ✓ MAXDATES.DUEDATE:
- ✓ GAGES.NAME:
- ✓ GAGES.HLOCATION:

- Step 3:** If you do not want gages with a certain status included in the Due Calibrations table, click on the corresponding check box and select the desired status from the drop-down list—for instance, Out of Service.
- Step 4:** You can automatically have the software synchronize the location/destination field. This option is useful when using gage tracking to provide consistent results. Select the check box to enable this option.
- Step 5:** The Recall Database can automatically split reports based on the contents of a specific field. This option is useful if you want to generate one report for gages that are due for calibration, but want each different location to receive its own sheet of gages. Check the box to enable this option, and select the appropriate field to use as the splitting field. When the reports are printed, this option will force a new page when ever the contents of this field change.

The Reports Tab

The Reports tab essentially allows you to determine the format of your printed gage reports.

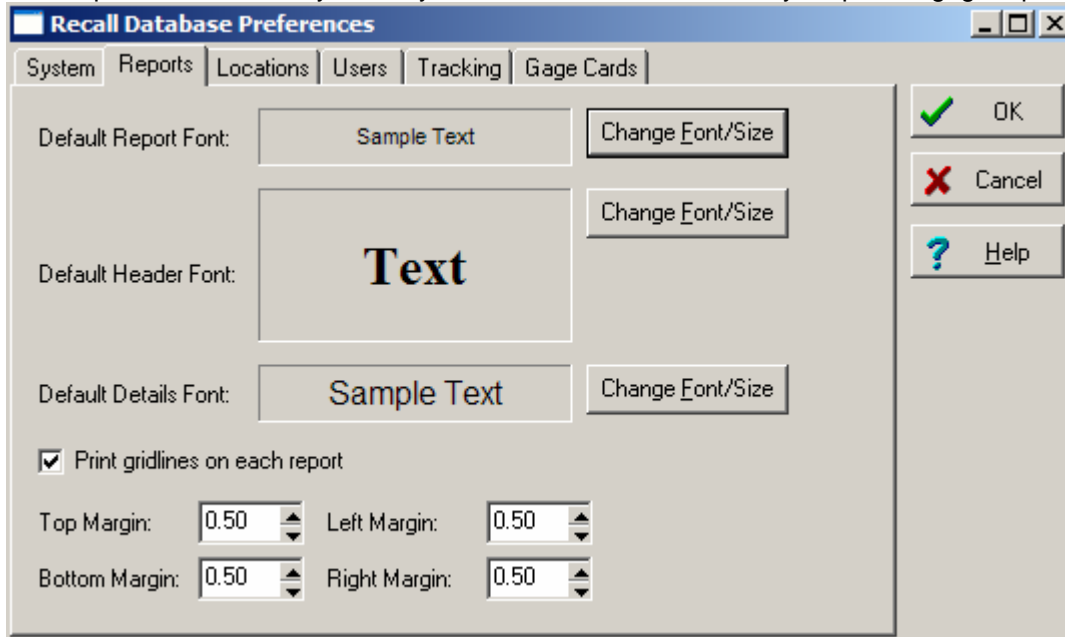


Figure 12: Reports Tab

To customize report format:

- Step 1:** Determine the default fonts for the following by clicking on the Font buttons and selecting from the options provided.
- ✓ The Default Report Font: This is the font of the data in the printed report.
 - ✓ The Default Header Font: This is the font of the header in your printed report.
 - ✓ Default Details Font: This is the font of additional information in your printed report, such as page number and report date.
- Step 2:** If you want grid lines visible in your printed report, click the Print Grid Lines on Reports check box. If not, leave it unchecked.
- Step 3:** Modify the margins by clicking inside the various margin boxes and increasing or decreasing the values.

The Locations Tab

The Locations tab lists the gage locations involved in gage tracking. By entering all gage locations here, you make them available for quick selection when checking gages in and out.

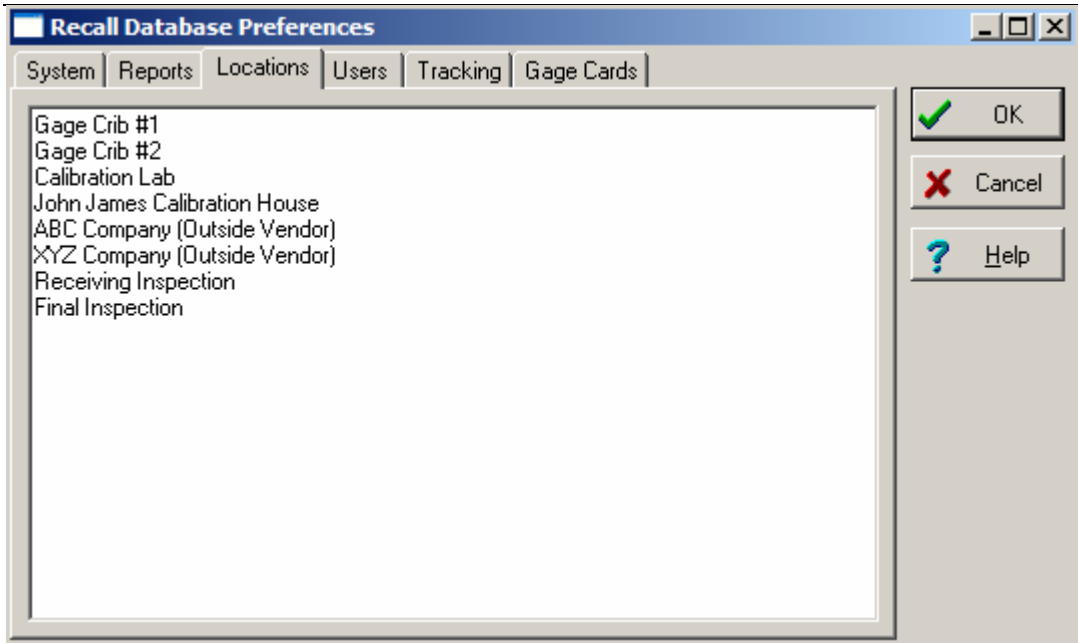


Figure 13: Locations Tab

To enter gage locations:

- Step 1:** Click inside the text box provided and simply enter a gage location. Press the Enter key.
- Step 2:** Type as many locations as you like in the text box, but be sure to list each location on a different line.

The Users

The Users tab lists the users able to check gages in and out in the gage tracking process. By entering all users here, you make their names available for quick selection when checking gages in and out.

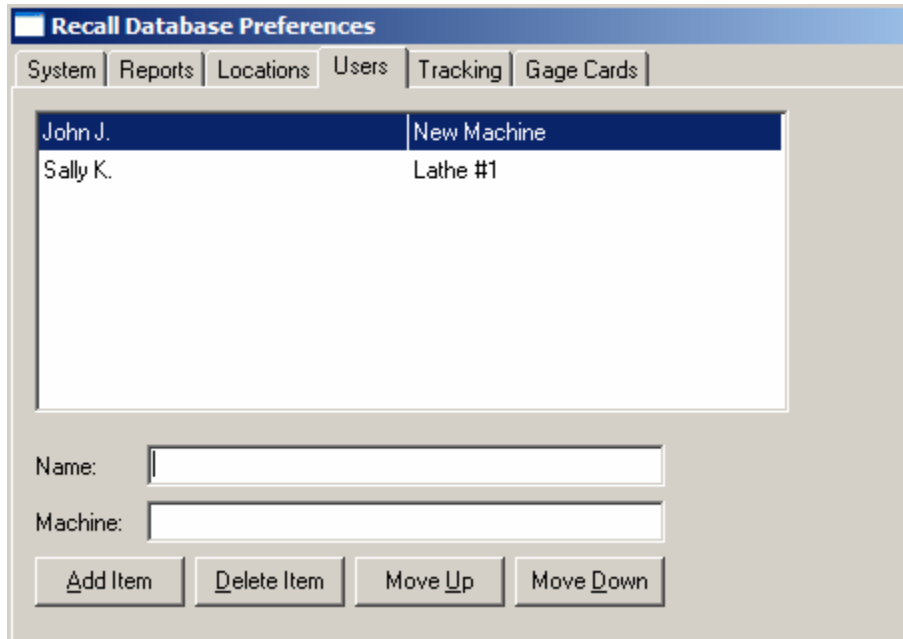


Figure 14: Users Tab

To enter user names:

- Step 1:** Click the Add Item button.
- Step 2:** Click inside the Name field and enter the user name.

The following step is optional.

Step 3: Tab to the Machine field and enter the type of gage or machine they will be checking in and out.

Step 4: Repeat Steps 1 through 3 for as many users as necessary.

Once you have added user names, you can change the order in which they appear in the list simply by clicking on them and using the Move Up and Move Down buttons.

To delete a user from the list:

Step 1: Simply highlight the user name in the list and click the Delete Item button.

To update user information:

Step 1: Simply highlight the user name in the list and modify the information in the Name and Machine fields.

The Tracking Tab

The Tracking tab allows you to customize the Recall Database's gage tracking features. Here you can determine the procedure followed by the Recall Database when gages are checked in and out. All of the defaults used when checking gages in and out are also found here.

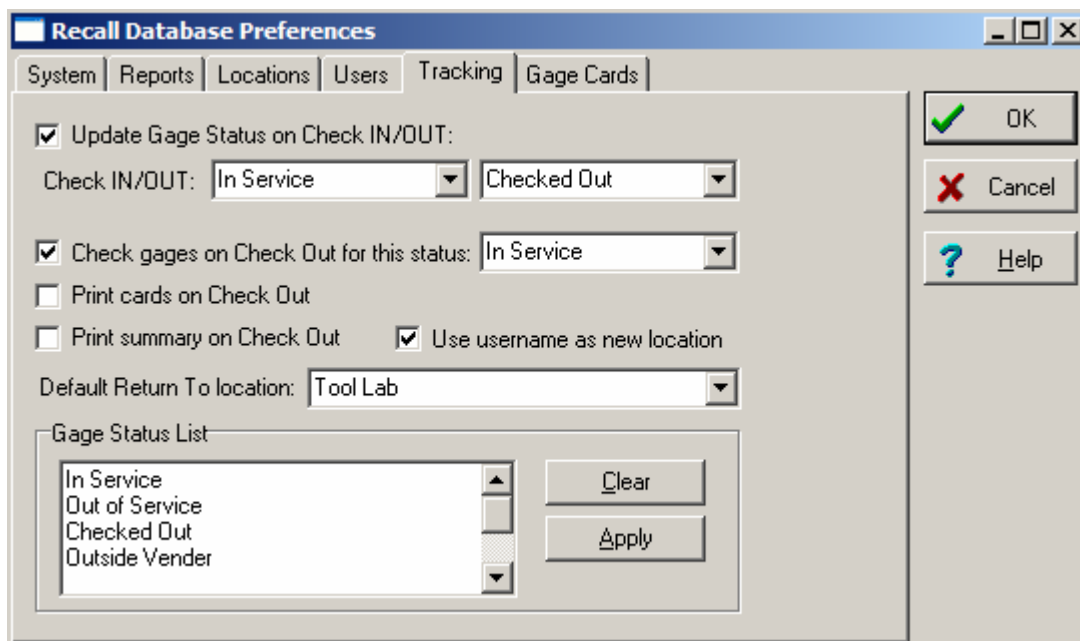


Figure 15: Tracking Tab

To customize gage tracking:

Step 1: If you want gage status updated each time the gage is checked in or out, click the Update Gage Status on Check IN/OUT check box.

Step 2: Determine the procedure followed by the Recall Database when a gage is checked out.

- ✓ If you want the gage status monitored each time a gage is checked out, click the Check Gages on Check Out for this Status check box and enter the desired status in the field provided. This option tells Recall that any gage you wish to check out must have this status.
- ✓ If you want gage cards printed automatically each time a gage is checked out, simply click the Print Cards on Checkout box. See the Gage Cards tab for setting up dimensions of your cards.
- ✓ If you want a gage summary printed each time a gage is checked out, simply click Print Summary on Checkout box.
- ✓ When using tracking, you may find it useful to cause Recall to make the Username of the person checking out the gage to become the new location. To enable this option, simply check the Use username as new Location checkbox.
- ✓ You can change the default Return To field used in the Checkout dialog box by simply selecting a location in the Default Return To dropdown box.

Step 4: Determine the different gage status choices available to you for selection during the gage tracking process and in the Gages window. Simply click inside the Status text box and type in the desired status options.

Step 5: Click the Apply button. Notice that the new gage status appears in the Check OUT/IN Status drop-down boxes, above.

Step 6: Repeat Steps 5 and 6 for as many gage status choices as you like.

You can clear all status choices simply by clicking the Clear All button.

The Gage Cards Tab

The Gage Cards tab allows you to customize the size of your gage tracking cards. Gage tracking cards are labels that can be printed each time a gage is checked out.

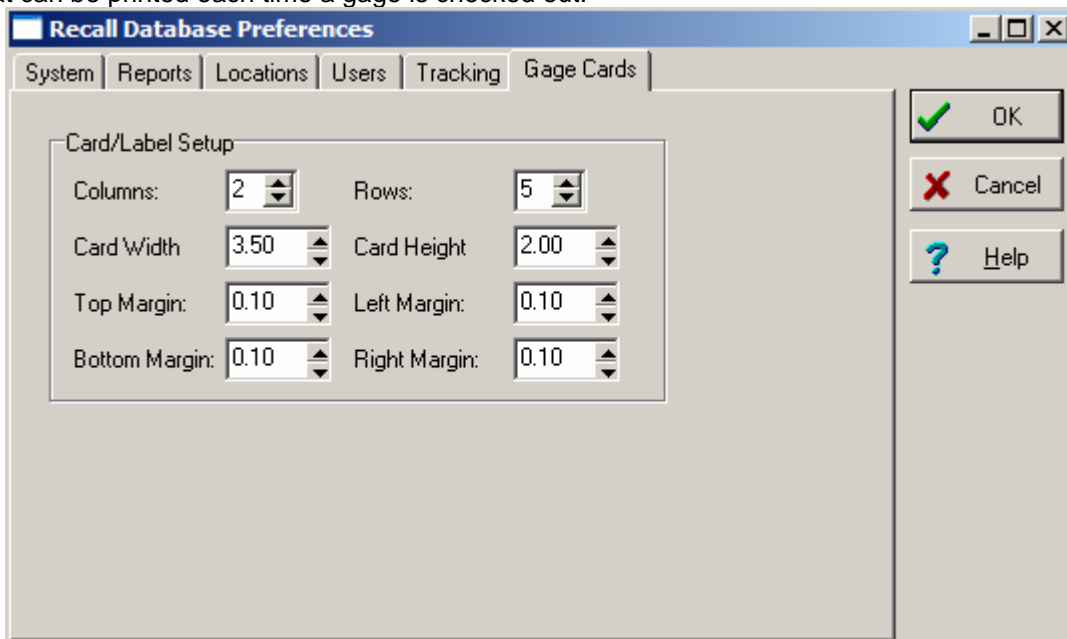


Figure 16: Gage Cards Tab

To determine the size and format of gage cards:

Step 1: Select the number of columns you want printed on your gage card. Use the arrow buttons provided to enter the desired number in the Columns field.

Step 2: Select the number of rows you want printed on your gage card. Use the arrow buttons provided to enter the desired number in the Rows field.

Step 3: Determine card width. Use the arrow buttons provided to enter the desired measurement in the Width field.

Step 4: Determine card height. Use the arrow buttons provided to enter the desired measurement in the Height field.

Step 5: Determine card margins by entering the appropriate measurements in the Margins fields.

Remember to Save Your Preferences!

Once you have customized the Recall Database to your satisfaction, using all the tabs available to you in the Recall Database Preferences window, be sure to click OK or press the Enter key to save your preferences.

Reports

The Recall Database provides you with a multitude of built-in, professional, and easy-to-read reports. These are available to you with the click of a button.

The tables described below can be manipulated to meet your specific needs. For more information about customizing reports, please refer to section entitled Tables in the Basic Features section.

Built-In Reports

All Gages

The Recall Database allows you to view an inventory of all your gages.

To retrieve the Inventory List:

Step 1: Click the Reports in the main menu and select Inventory List.

The Inventory List displays the following information:

- ✓ Gage Control Number
- ✓ Gage Name
- ✓ Gage Manufacturer
- ✓ Gage Model
- ✓ Gage Location

Calibration Status

The Report table provides you with the calibration status of all your gages. Here you can view the date your gages were last calibrated, as well as the date they are next due for calibration.

To retrieve the Gage Status table:

Step 1: Click the fourth button in the toolbar,  or click Reports in the main menu and select Gage Status List.

The Gage Status Report table displays the following information:

- ✓ Gage Control Number
- ✓ Gage Name
- ✓ Gage Location
- ✓ Date of Next Calibration
- ✓ Date of Last Calibration
- ✓ Calibration Document Number

Due Calibrations

You may frequently want to generate a report of all due calibrations. The Recall Database provides you with such a report. All you need to do is specify the desired date range for which you want to view due calibrations, and the software does the rest. In addition to using the specified date range criteria, the software will also select any usage based gages that are due for calibration based either of # of usage hours or the total number of parts measured.

To retrieve the Due Calibrations Report:

Step 1: Click the third button in the toolbar,  or click Reports in the main menu and select Due Calibrations.

Step 2: When prompted, enter the desired date range for which you want to view due calibrations. (The date format is the same as that specified in your Windows settings.) Click OK or press the Enter key. Notice you have retrieved the Due Calibrations Report.

The Due Calibrations Report displays the following information:

- ✓ Gage Control Number
- ✓ Calibration Due Date
- ✓ Gage Name
- ✓ Gage Location

All Calibration Records

The Recall Database also provides you with the option of viewing all calibrations performed, as opposed to just those that are due. The Calibrations window displays records similar in format to those displayed in the Gages window.

To retrieve the Calibrations window:

Step 1: Click View in the main menu and select Calibrations.

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




- Control #: IND-1231
- Cal Date: 9/21/2004
- Next Cal Date: 9/21/2005
- Document #: 116
- Certificate by: Technician #1
- Filename: \Data\1k\W116.CAL
- Passed Calibration
- Repairs: None.
- Quick Find Document #: (empty box)

At the bottom of the window, there is a set of navigation buttons: a left arrow, a double left arrow, a right arrow, a double right arrow, a plus sign, a minus sign, and a checkmark.

Figure 17: Calibrations Window

Step 2: To search through calibration records, simply use the arrow buttons.

Calibrations Window	
Field	Function
Control #	Displays the control number of the gage.
Cal Date	Displays the date of the last calibration.
Next Cal date	Displays the date of the next calibration.
Document #	Displays the document number of the calibration report.
Certificate by	Displays the name of the person who certified the gage.
Filename	Displays the filename of the calibration report.
Passed Calibration	Displays a check mark if the gage passed the calibration.
Repairs	Displays any repairs made on the gage.
Quick Find Document #	Key in a specific calibration document number into this box to jump automatically to that calibration record.
Arrow buttons	Allows you to manipulate the records in the window. Use the arrow buttons to search through your gage records.

Calibrations Window	
Field	Function
Add 	Allows you to add a new record to the database. Simply click the button and enter the new information.
Delete 	Allows you to delete a given record from the database.
Save 	Allows you to save any modifications you make to a particular record.

Gages in a Specific Location

You may occasionally want to generate a report listing all gages in a specific location. This is easily done, using the Recall Database's Location Search feature.

To retrieve the Location Search table:

Step 1: Click Reports in the main menu and select Location Search.

Step 2: When prompted, enter the desired location and click OK or press the Enter key. Notice you have retrieved the Location Search table.

The Location Search table provides you with the following information:

- ✓ Gage Control Number
- ✓ Gage Name
- ✓ Gage Manufacturer
- ✓ Gage Model
- ✓ Gage Location

Gages in a Specific Department

Just as you can generate a report listing all gages in a specific location, you can do the same for all gages in a specific department.

To retrieve the Department Search table:

Step 1: Click Reports in the main menu and select Department Search.

Step 2: When prompted, enter the desired department and click OK or press the Enter key. Notice you have retrieved the Department Search table.

The Department Search table provides you with the following information:

- ✓ Gage Control Number
- ✓ Gage Name
- ✓ Gage Manufacturer
- ✓ Gage Model
- ✓ Gage Location

Gages with a Specific Status

The Recall Database allows you to generate a report of all gages with a specific status—be it in service, out of service, checked out, etc.

To retrieve the Gages (Status) table:

Step 1: Click Reports in the main menu and select Out of Svc. Search.

Step 2: When prompted, enter the desired gage status and click OK or press the Enter key. Notice you have retrieved the Gages (Status) table.

The Gages (Status) table provides you with the following information:

- ✓ Gage Control Number
- ✓ Gage Name
- ✓ Gage Manufacturer


- ✓ Gage Model
- ✓ Gage Location

Customized Reports

Aside from providing you with numerous built-in reports, the Recall Database provides you with the ability to custom-make your own reports.

Creating/Deleting Reports

To create your own report:

Step 1: Click the fifth button in the tool bar,  or click View in the main menu and select Report Writer. Notice that you have retrieved the Report Setup window. Notice also that the main menu has changed; all menu selections now pertain only to the custom report writer.

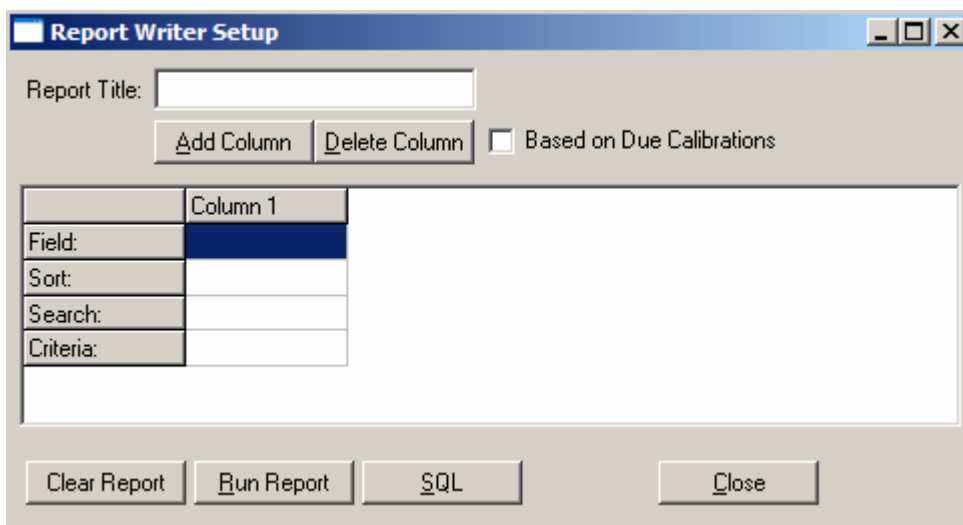


Figure 18: Report Setup Window

Step 2: Enter a title for your report in the Title field.

Step 3: The column visible in the Report Setup window is the first column in your report. Under Column 1, click on the Field cell.

Step 4: From the pop-up menu, select the field you would like displayed in the first column of your report. Example: Control.

Step 5: Click on the Sort cell. Here you can determine whether the items displayed in the first column of your report are sorted in ascending or descending order. Simply choose from the pop-up menu. Example: Ascending.

If you do not want to specify any special sort order, simply select None from the pop-up menu or leave it blank.

Step 6: Click on the Search cell. Here you can determine the method by which the Recall Database searches for the items to place in your column. Your options include:

- ✓ (None): Select this option if you do not want to specify any search criteria for this column.
- ✓ Contains: Select this option if you want the items displayed in your column to contain a specific word or number pattern.
- ✓ Equals: Select this option if you want the items displayed in your column to match an exact word or number pattern.
- ✓ Greater Than: Select this option if you want the items displayed in your column to be greater than a certain numeric value or date.

- ✓ Less Than: Select this option if you want the items displayed in your column to be less than a certain numeric value or date.
- ✓ Greater or Equal To: Select this option if you want the items displayed in your column to be greater than or equal to a certain numeric value or date.
- ✓ Less or Equal To: Select this option if you want the items displayed in your column to be less than or equal to a certain numeric value or date.

Step 7: Now that you have determined *how* the Recall Database is going to search for items to display in your column, tell the program *what to search for*—that is, the specific search criteria for the items in your column. Click on the Criteria cell. Type in the desired word or number pattern. You have now created the first column in your customized report.

To allow for more general and multi-purpose searches and reports, you can have recall prompt you for search criteria every time the report is run. For example, you could create a report that shows all the gages for a specific department. Instead of putting in the exact department you are looking for, you could put something like: ":S_LOCATION" inside the criteria field. By entering the colon (:) at the beginning of the criteria, it tells the software to use this text as our prompt. Try entering something like the report shown in the figure above, but change the Search cell under HLOCATION from (None) to EQUALS, then enter :S_LOCATION in the criteria field. Then run the report.

Step 8: Add another column by clicking on the Add Column button.

You can delete a column at any time by clicking the Del Column button.

Step 9: Repeat Steps 3 through 8 for as many columns as you like.

Step 10: When you have created all the columns you want in your customized report, click the Run Report button.

Step 11: If the report is to your satisfaction, close it and click File in the main menu; select Save. Give your report a filename, and click OK or press the Enter key. If you want to add the file as an option in the Custom Reports menu, click Yes when prompted.

Using Structured Query Language to Create a Report

The SQL button in the Report Writer allows you to see the fields you are creating in structured query language. Essentially this feature serves as an educational tool. It teaches you a specialized language that can facilitate the creation of custom reports.

If you know SQL, you can bypass the point-and-click method of creating a custom report altogether. Simply click View in the main menu and select Expert SQL.

To retrieve a custom report:

Step 1: Click Reports in the main menu and select Custom. From the pop-up menu, simply click on the desired report.

Tracking

The Recall Database allows you to track your gages' whereabouts, status, in and out dates, and much more.

Checking Out

To check out a gage:

Step 1: Click View in the main menu and select Tracking. Notice you have retrieved the Gage Check IN/OUT window.

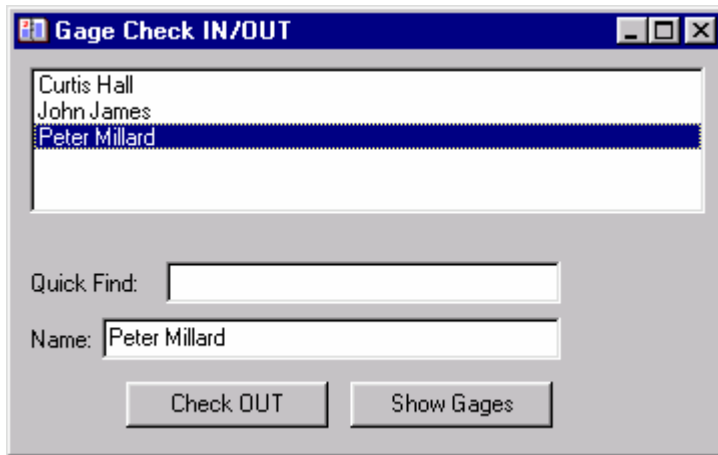


Figure 19: Gage Check IN/OUT Window

Step 2: Click the Name drop-down box and select the appropriate user from the list. You can also type a name directly into this field.

Step 3: Click the Check Out button. Notice that additional fields now appear and that the window now consists of two tabs: the Info tab and the Gages tab.

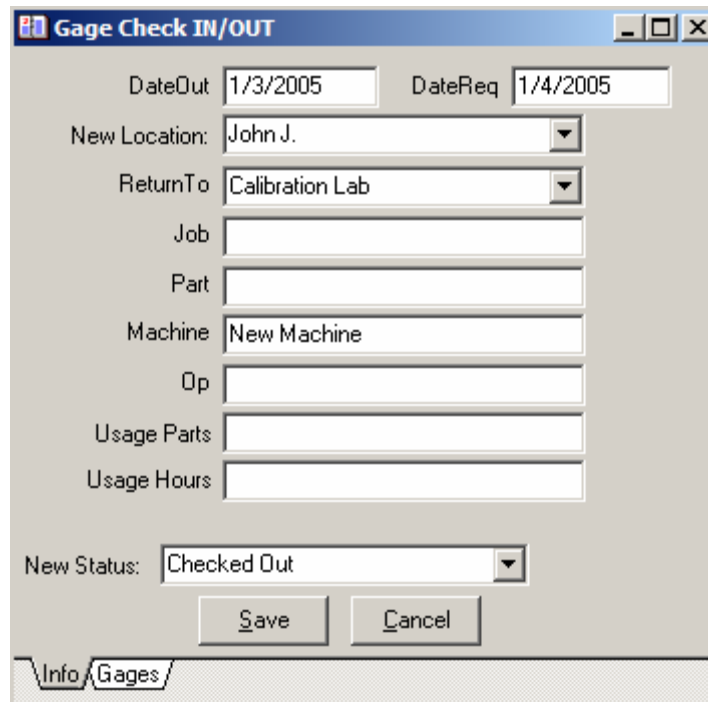


Figure 20: Info Tab

- Step 4:** In the Info tab, notice that dates have been entered for you in the DateOut and DateReq.
- ✓ DateOut refers to the date the gage was checked out.
 - ✓ DateReq refers to the date the gage must be checked in.
You can modify these dates if you like. Simply tab to the desired field and enter the new date (MM/DD/YY format).
- Step 5:** Click the New Location drop-down box and select the gage's new location from the list.
- Step 6:** Click the Return To: drop-down box and select the location to which the gage should be returned.
- Step 7:** Tab to the Job, Part, Machine, and Op fields and enter the appropriate information.
- Step 8:** Enter in the number of parts to be measured and/or the number of total usage hours to be used for this check-out transactions. These values are simply defaults to be used for each gage. See the Gages tab below for more details
- Step 9:** Tab to the New Status field. The status here defaults to Checked Out, but you are able to change it. Simply click on the drop-down box and select a new status from the list.
- Step 10:** Click on the Gages tab.

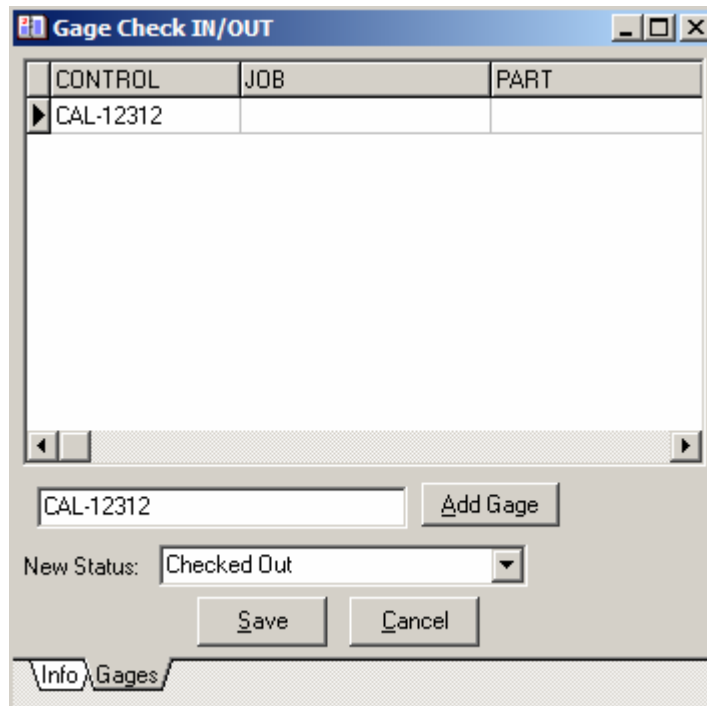


Figure 21: Gages Tab

- Step 11:** Use one of the following methods to add the gages you want to check out to the blank text box.

- ✓ Go to the Gages window (but do *not* close the Gages Check IN/OUT window), find the desired gage, and click the Check In/Out button in the lower right-hand corner.
- ✓ Enter a control number in the blank field beneath the grid, then click the Add Gage button.

As you add gages for this check-out transaction, each gage will add a row to the grid in the Gages tab. The columns of the grid allow you to over-ride the default information that was entered in the info tab. This capability allows you to check out multiple gages to the same user for use on different parts, or jobs.

The Usage fields MPARTS and HOURS should be filled in for all gages that use usage based recalibrations. These fields are used as “estimates” for the usage of this gage. If the estimated numbers force the gages to be recalibrated in the middle of the job, the software will automatically flag the gage. When this occurs, you can remove the gage from this check-out transaction, cancel the entire check-out transaction, or over-ride the warning and continue with the gage check-out.

- Step 12:** Repeat Step 10 for as many gages as you want to check out.

Step 13: Click the Save button to save the transaction to the database. If you have selected to print any reports or gage cards after gage checkouts, they will be printed now.

Step 14: If you have set the gage tracking portion of the software to automatically print check-out summaries or gage cards, you will be prompted to verify the printer information and print those reports. If you want to bypass the printing, simply click the Cancel button on the printer dialog box when it appears.

Checking In

To check in a gage:

Step 1: Click View in the main menu and select Tracking. Notice you have retrieved the Gage Check IN/OUT window.

Step 2: Click the Name drop-down box and select the appropriate user from the list. You can also type a name directly into this field.

Step 3: Click the Show Gages button. Notice that all the gages checked out by the particular user are now listed below.

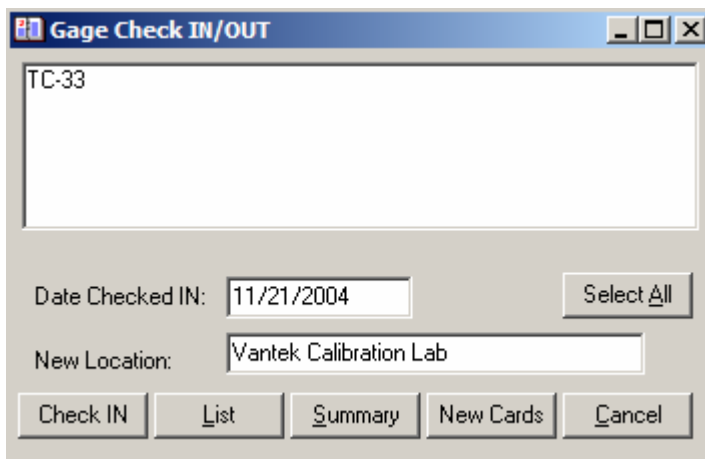


Figure 22: Gage Check IN/OUT Window (Show Gages)

You can display a list of all the gages checked out to a particular user by clicking the List button. You can also print a summary report for a particular user by clicking the Summary button.

Step 4: Highlight the gage(s) you want to check in. To highlight more than one, hold down the Ctrl or Shift key while selecting.

Step 5: Tab to the Date Checked IN field and enter the desired date, if different from the date already displayed.

Step 6: Tab to the New Location field and enter the desired location, if different from the one already displayed.

Step 7: Click the Check In button.

Step 8: For any gages that use usage based recalibration intervals, the following window will be shown with a row in the grid for each gage that uses usage based intervals.

Control	Actual Parts	Actual Hours
354534	108	

Done

Figure 23: Gage Check-In Usage Window

This window allows you to enter the actual usage information (either hours OR the number of parts measured) on the job. The estimates that were originally entered at Check-Out will be shown as defaults in the appropriate cells.

Once you have modified all the proper information, click the Done button to update the gage information.

What's In and What's Out?

Now that you know how to check gages in and out, you'll want to keep track of which gages have been checked out, which have been checked in, to whom, where, when, etc.

Gage Tracking Records

The Tracking Records window provides you with tracking records, similar to gage records, which allow you to search through:

- ✓ All gages that have been checked out
- ✓ All gages that have been checked in
- ✓ Both combined

To retrieve the Tracking Records window:

Step 1: Click View in the main menu and select Tracking Records. Notice you have retrieved the Tracking Records window.

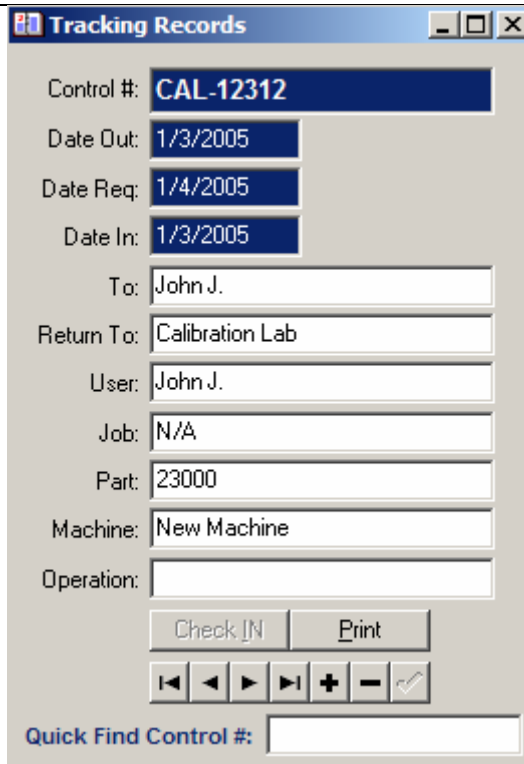


Figure 24: Tracking Records Window




- Step 2:** To search through all tracking entries, click on the All Entries tab and use the arrow buttons.
- Step 3:** To search through gages which have been checked out, click on the Checked OUT tab and use the arrow buttons.
- Step 4:** To search through gages which have been checked in, click on the Checked IN tab and use the arrow buttons.

What Is the Tracking Records Window Showing Me?

The Tracking Records window displays detailed gage tracking information. Here you can view all pertinent dates, locations, and gage information. The Tracking Records window allows you to add, modify, and delete gage tracking records. You can also check gages in and out directly from here. Please refer to the table below for more information.

The fields defined below apply to all three tabs of the Tracking Records window.

Tracking Records Window	
Field	Description
Control	Displays the control number of the gage.
DateOut	Displays the date the gage was checked out. (The date format is the same as that specified in your Windows settings.)
DateReq	Displays the date the gage must be checked in.
DateIn	Displays the date the gage was checked in.
To	Displays the location to which the gage was moved.
ReturnTo	Displays the location to which the gage was returned.
User	Displays the name of the user or company who checked out or checked in the gage.

Tracking Records Window	
Field	Description
Job	Displays a description of the job performed by the user with the gage.
Part	Displays a description of the gage part being inspected or manufactured.
Machine	Displays the name of a machine used during the inspection or manufacturing of the part.
Operation (Op)	Displays a description of any operation performed with gage.
Check OUT	Allows you to check out a gage directly from the Tracking Records window. Simply press the button.
Check IN	Allows you to check in a gage directly from the Tracking Records window. Simply press the button.
Print	Allows you to preview the gage record as it would look on the printed page. From Print Preview, you can click on the Print button and print the record.
Arrow buttons	Allows you to manipulate the records in the window. Use the arrow buttons to search through your gage records.
Add: 	Allows you to add a new record to the database. Simply click the button and enter the new information.
Delete: 	Allows you to delete a given record from the database.
Save: 	Allows you to save any modifications you make to a particular record.

Displaying/Viewing Tracking Reports

The Recall Database provides you with a multitude of built-in, professional, and easy-to-read gage tracking reports. These are available to you with the click of a button.

The tables described below can be manipulated to meet your specific needs. For more information about customizing reports, please refer to section entitled Tables in the Basic Features section.

Gages Checked Out to a Particular User

The Recall Database allows you to generate a report for a particular user, listing all the gages he or she has checked out.

To display the gages checked out to a user:

- Step 1:** Click View in the main menu and select Tracking. Notice you have retrieved the Gage Check IN/OUT window.
- Step 2:** Click the Name drop-down box and select the appropriate user from the list. You can also type a name directly into this field.
- Step 3:** Click the Show Gages button. Notice that all the gages checked out to the particular user are now listed below. Highlight the gage(s) you want to get information about.
- Step 4:** Click the List button at the bottom of the window. Notice you have retrieved the Gages Checked out to: (User Name) window.

The Gages Checked out to: (User Name) window displays the following information:

- ✓ Gage control number
- ✓ Gage name
- ✓ Date checked out
- ✓ Date to be checked back in (DATEREQ)
- ✓ Date checked in
- ✓ Current destination
- ✓ Location to which gage will be returned

Gages Used on a Particular Job

The Recall Database allows you to generate a report listing all gages used on a particular job.

To retrieve the Job Search window:

Step 1: Click Reports in the main menu and select Tracking. From the pop-up menu, select Job # Search.

Step 2: When prompted, enter the job for which you want to search. Then click OK or press the Enter key. Notice you have retrieved the Job Search window.

The Job Search window displays the following information:

- ✓ Gage name
- ✓ Gage control number
- ✓ Date checked out
- ✓ Date checked in
- ✓ Date to be checked back in (DATEREQ)
- ✓ Current destination
- ✓ Location to which gage will be returned
- ✓ User name
- ✓ Job
- ✓ Part
- ✓ Machine
- ✓ Operation

Gages Used on a Particular Part

The Recall Database allows you to generate a report listing all gages assigned to a particular part.

To retrieve the Part # Search window:

Step 1: Click Reports in the main menu and select Tracking. From the pop-up menu, select Part # Search.

Step 2: When prompted, enter the part for which you want to search. Then click OK or press the Enter key. Notice you have retrieved the Part # Search window.

The Part # Search window displays the following information:

- ✓ Gage name
- ✓ Gage control number
- ✓ Date checked out
- ✓ Date checked in
- ✓ Date to be checked back in (DATEREQ)
- ✓ Current destination
- ✓ Location to which gage will be returned
- ✓ User name
- ✓ Job
- ✓ Part
- ✓ Machine
- ✓ Operation

List of gages used on a specific machine

The Recall Database allows you to generate a report listing all gages used at a specific machine.

- Step 1:** Click Reports in the main menu and select Tracking. From the pop-up menu, select Machine Search.
- Step 2:** When prompted, enter the machine for which you want to search. Then click OK or press the Enter key. Notice you have retrieved the Machine Search window.

The Machine Search window displays the following information:

- ✓ Gage name
- ✓ Gage control number
- ✓ Date checked out
- ✓ Date checked in
- ✓ Date to be checked back in (DATEREQ)
- ✓ Current destination
- ✓ Location to which gage will be returned
- ✓ User name
- ✓ Job
- ✓ Part
- ✓ Machine
- ✓ Operation

Gages Checked Out to a Particular Location

The Recall Database allows you to generate a report listing gages checked out to a particular location.

- Step 1:** Click Reports in the main menu and select Tracking. From the pop-up menu, select Location Search.
- Step 2:** When prompted, enter the job for which you want to search. Then click OK or press the Enter key. Notice you have retrieved the Location Search window.

The Location Search window displays the following information:

- ✓ Gage name
- ✓ Gage control number
- ✓ Date checked out
- ✓ Date checked in
- ✓ Date to be checked back in (DATEREQ)
- ✓ Current destination
- ✓ Location to which gage will be returned
- ✓ User name
- ✓ Job
- ✓ Part
- ✓ Machine
- ✓ Operation

How Do I use the Custom Report Writer with Tracking Info?

All of the Gage Tracking information is available in the Custom Report Writer under the Tracking menu. To select only gages that are checked out, use the DateIn field and select the IS NULL option under the search menu. To select all the gages which have been checked in, use the DateIn field and select Greater Than in the search menu, and enter a valid date in the Criteria box (like 1/1/1980).

Printing


All reports generated in the Recall Database come with their own button bar at the top of the window. This button bar allows you to preview and print any report you generate, directly from the report window itself.

Before printing a report, it is advisable to use the Print Preview feature. Please refer to Using Print Preview, below, for more information.

Using Print Preview

The Recall Database's Print Preview feature is useful in that it allows you to see how a report will look on the printed page.

To preview a report:

- Step 1:** Retrieve the desired report if it is not already displayed on your screen.
- Step 2:** Click the third button in the window's button bar.  Notice you have retrieved the Report (Print Preview) window.
- Step 3:** Use the scroll bar to view the entire document.
- Step 4:** Click the Print button if you want to print the report immediately. Otherwise, click the Close button.

When previewing a report in the Recall Database, you can only view the first page of the report.

Printing a Report

Once you've previewed your report, you're ready to print it. Simply follow these steps:

- Step 1:** Click the fourth button in report's button bar.
- Step 2:** When presented with the Print window, specify the number of copies you want to print by clicking inside the Copies field and entering a number. Then click OK or press the Enter key.

You can also access the traditional Windows Print Setup feature. Simply click the File in the main menu and select Print Setup.

Maintaining the Database

The Recall Database is fairly self-sufficient. However, several operations can be performed using some menu items.

Other Tools and Options

Updating Summary Fields

The summary fields are hidden fields in the Gages table that contain information about when the gage is due for recalibration and current usage information. Using the Edit | Update Summary Fields menu option, you can have the Recall Database recalculate all the next calibration due dates and the current usage information for each gage.

Purge Orphan Calibration Records

Orphan Calibration records are calibration reports that are for a specific control number (gage), but that control number (gage) does not exist in the main gages table. Selecting this option will remove all those calibration records with no corresponding gages.

Purge Gages with No Calibrations

This feature allows users to delete gages that do not have entries in the Cal History tab. Basically, they are empty gages without a single calibration (no dates, doc#, cert by, etc.)

Purge Gages with a Status

This allows you to remove all gages with a specific status. For example, if you want to remove all the gages that have a status of "Lost", you would select this menu option, and specify "Lost" as the criteria.

