

## CALIBRATION REMINDER OVERVIEW

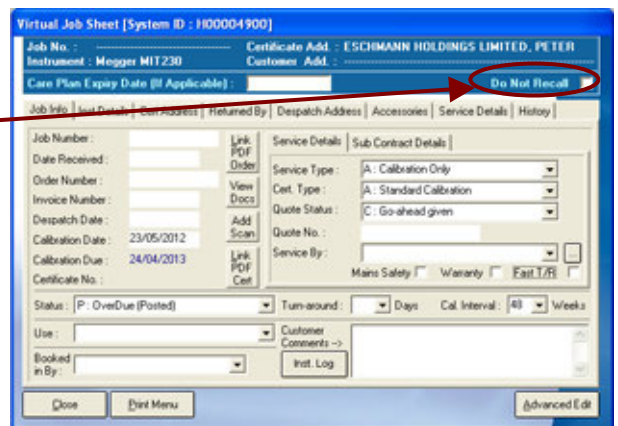
The calibration reminder functions provide an intelligent system for evaluating calibration records and determining both DUE and OVERDUE instrument calibrations.

The software automatically scans the database and evaluates instrument status codes in order to determine if a letter is required. This includes detection for previous inclusion on a reminder letter (due or overdue) in order to ensure a customer is only sent a letter once when DUE and once when the instrument becomes OVERDUE.

To allow a customer instrument list to be maintained on their behalf, an alternative function is also available. This allows lists of DUE and OVERDUE instrument calibrations to be compiled and viewed on screen or printed. This list can be run at any time and results filtered to exclude instruments not returned within a certain period (ie. Customer has or does not want to return for calibration).

## DO NOT RECALL function

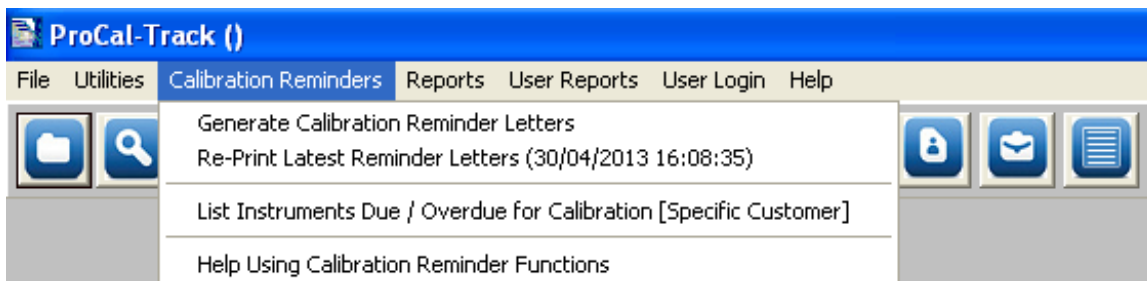
The reminder function can be over-riden when a customer does not require any reminders for an instrument by setting the DO NOT RECALL checkbox in an instrument record.



## CALIBRATION REMINDER MENU

ProCal-Track has a new Calibration Reminders menu – this provides quick access to the reminder functions in one easy click.

Functions available are as follows :



- Generate Calibration Reminder Letters
- Re-Print Latest Reminder Letters
- List Instruments Due / Overdue for Calibration [Specific Customer]
- Help Using Calibration Reminder Functions

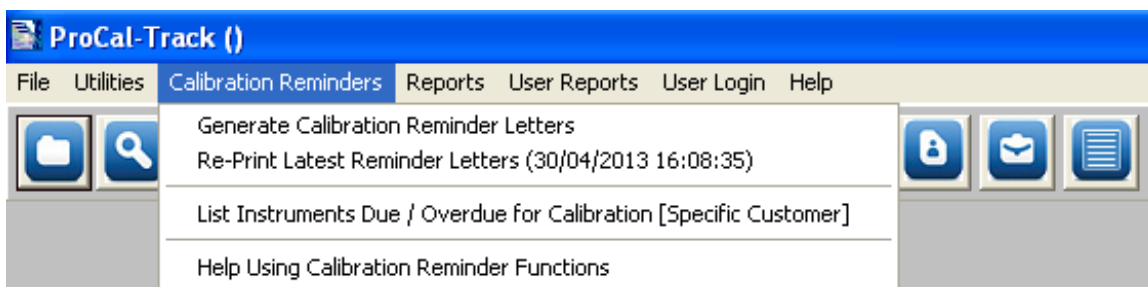
### GENERATE CALIBRATION REMINDER LETTERS

ProCal-Track offers an enhanced instrument reminder function which integrates with *Crystal Reports* to provide a fully customisable letter format.

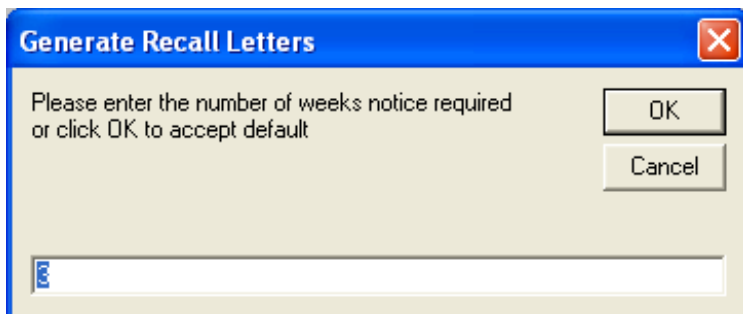
The reminder function offers a flexible approach to maintaining instrument reminders, allowing the letters to be previewed on screen and also to be reprinted at any time between the current recall session and subsequent sessions.

### STEP 1 : RUNNING THE INSTRUMENT REMINDER FUNCTION

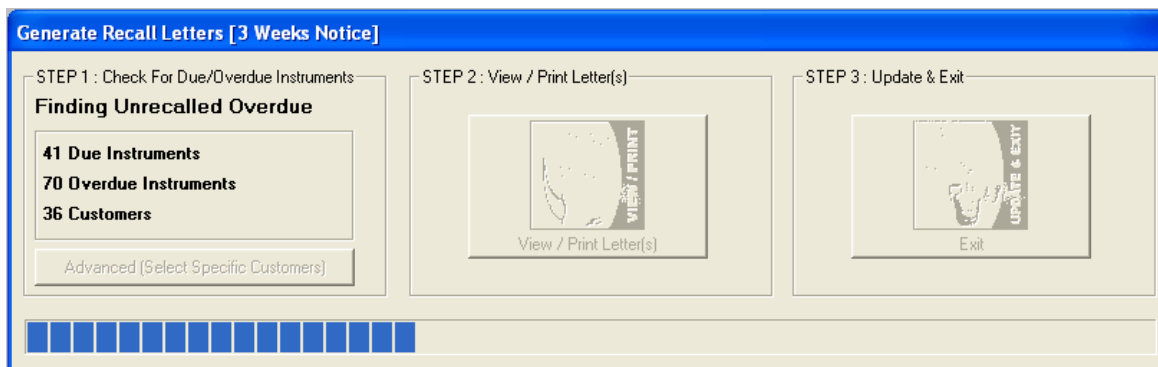
The instrument reminder function is started using the following menu item  
**Calibration Reminder -> Generate Calibration Reminder Letters**

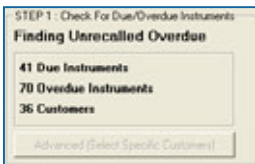


ProCal-Track will ask the user for a number of weeks notice required – the default setting is 3 weeks notice :



The main reminder function screen will now be displayed – the instrument database will be examined to determine instruments which require recall – this includes both DUE instruments and OVERDUE instruments – this may take a few minutes depending on the database size :

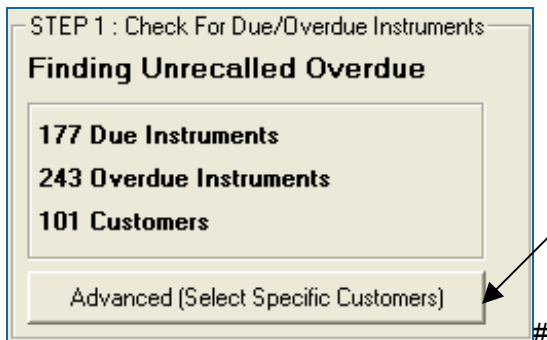




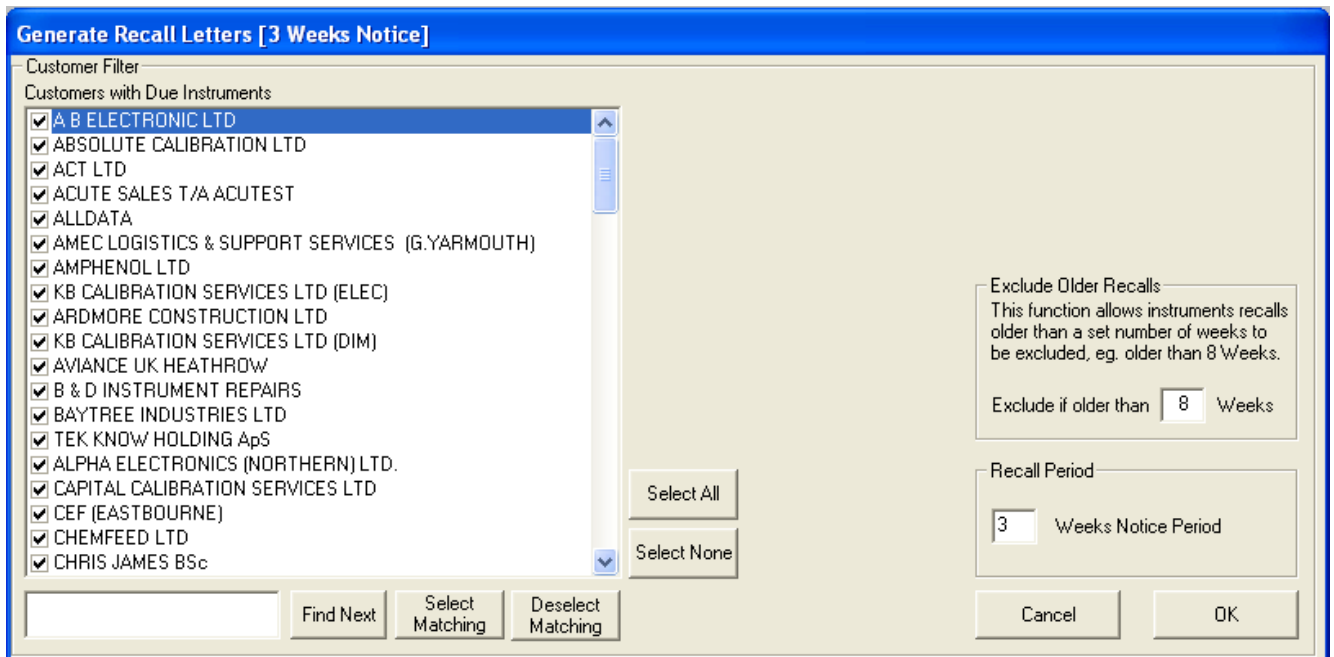
STEP 1 of the screen displays the number of **DUE** instruments, **OVERDUE** instruments and the total number of **CUSTOMERS** - a progress bar at the bottom of the screen show the progress. through the instrument database

## REFINING THE LIST OF CUSTOMERS

The list of customers determined during the initial search for **DUE** and **OVERDUE** instruments can be refined if required by clicking on the **Advanced (Select Specific Customers)** button :



This will display the customer select screen and advanced options :



To refine the customers to include in the list of recall letters, simply deselect any not required using the tick to the left of the name (for example, you may wish to exclude international customers).

Click on the OK button to re-run the database scan including only the customers selected (this may take a few minutes)

## Advanced Options

Exclude Older Recalls  
This function allows instruments recalls older than a set number of weeks to be excluded, eg. older than 8 Weeks.

Exclude if older than  Weeks

This function allows instruments to be excluded from the check if the recalibration date is older than a user defined number of weeks.

This is useful when running the reminder function for the first time on an existing database to ensure older calibrations are not requested.

Recall Period

Weeks Notice Period

The default recall period in weeks can be defined by the user here.

This number is the number of weeks notice a customer will be given that their instrument(s) are due for calibration.

## STEP 2 : PREVIEWING & PRINTING THE DUE/OVERDUE LETTERS



The instrument reminder system is designed with efficiency in mind, and the new letter design includes both DUE and OVERDUE notices on the same letter. This saves on paper and provides a concise report for the customer.

For instruments which have been sub-contracted to you from other laboratories, the reminder letter will also detail their clients name so they may contact them directly :

**INSTRUMENT CALIBRATION NOTIFICATION**

Transmille Ltd.  
Unit 4 Select Business Centre  
Lodge Road, Staplehurst  
Kent, TN12 0QW.  
Tel : 01500 690700 Fax : 01500 690700

**RECIPIENT**  
MEL TIMMINS  
ACTIVE GAMES TIA AGENCY  
CENNEY ROAD  
HIGH CAMP BUSINESS PARK  
NEWCASTLE  
STAFFS, ST4 7UD

FOR THE ATTENTION OF : MEL TIMMINS

**INSTRUMENTS DUE / OVERDUE FOR CALIBRATION**

The following instruments are due / overdue for calibration or indication of receipt and should be calibrated as soon as possible to ensure integrity of the instrument, please ensure that they are properly packed.

Please ignore this letter if the instrument has already been returned.

INSTRUMENTS OVERDUE FOR CALIBRATION		
Instrument/Owner	Serial Number	Calibration Due
Transmille-Transmille 1506 Digital Multimeter	170104	28/06/2009
CPO PICO PEEKS RESISTANCE BOX (Southern Gas Network)	36961	28/06/2009
Exxon MIC 10 Precision Calibrator (Southern Gas Network)	1384	28/06/2009
Fluke 150 Digital Multimeter (Southern Gas Network)	80360235	28/06/2009
Exxon MIC 10 Precision Calibrator (Southern Gas Network)	711	28/06/2009

INSTRUMENTS DUE FOR CALIBRATION		
Instrument/Owner	Serial Number	Calibration Due
Fluke T18000 Electrical Test Calibrator	4900670	17/07/2009
P.S. OPTO PHYSICS H OPERATOR	PS129	21/07/2009
P.S. OPTO PHYSICS H OPERATOR	PS122	21/07/2009

**Laboratory Address**

**Customer Address (with return laboratory address)**

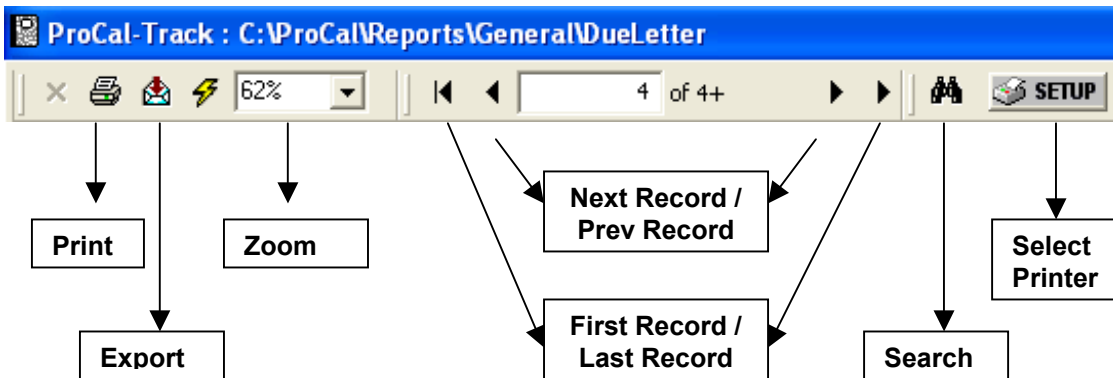
**Letter text – this can be edited as required using Crystal Reports**

**List of OVERDUE instruments (if any) Includes full description, serial number and calibration due date.**

**List of DUE instruments (if any) Includes full description, serial number and calibration due date.**

The report template is named **DueLetter.rpt** and is located in the **ProCal/Reports/General** folder.

The controls at the top of the Crystal Report Preview Screen can be used to select which printer to use and which letters to print, although it is normal to print all letters unless a customer has asked for a reprint of their current reminder letter.

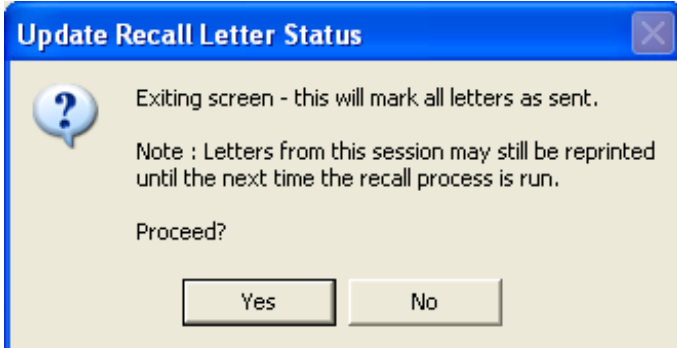


### STEP 3 : UPDATE & EXIT



The final step after letters have been printed is to update the instruments which have been added to a letter to 'posted' – this ensures letters are not duplicated.

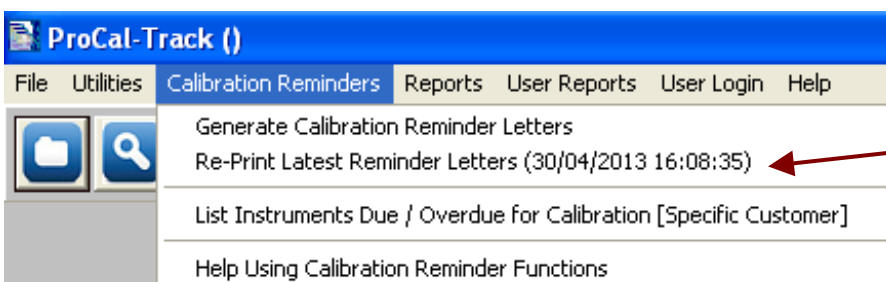
Clicking on UPDATE & EXIT will display the following message :



Click YES to update instruments and close the close reminder function screen – this will show a progress bar whilst updating the database.

The message also indicates that recall letters from the this session may still be displayed and printed at any time until the next session (i.e. The next time the reminder function is run)

This can be done at any time by accessing the Reports menu :

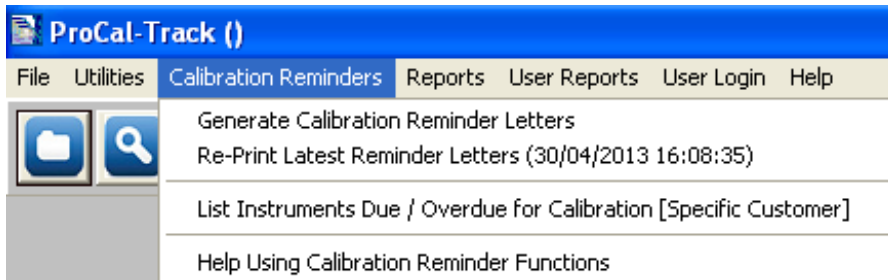


This menu item allows the last generated reminder letters to be previewed on screen and printed – ideal if one or more letters are require to be printed after the recall function has been run.

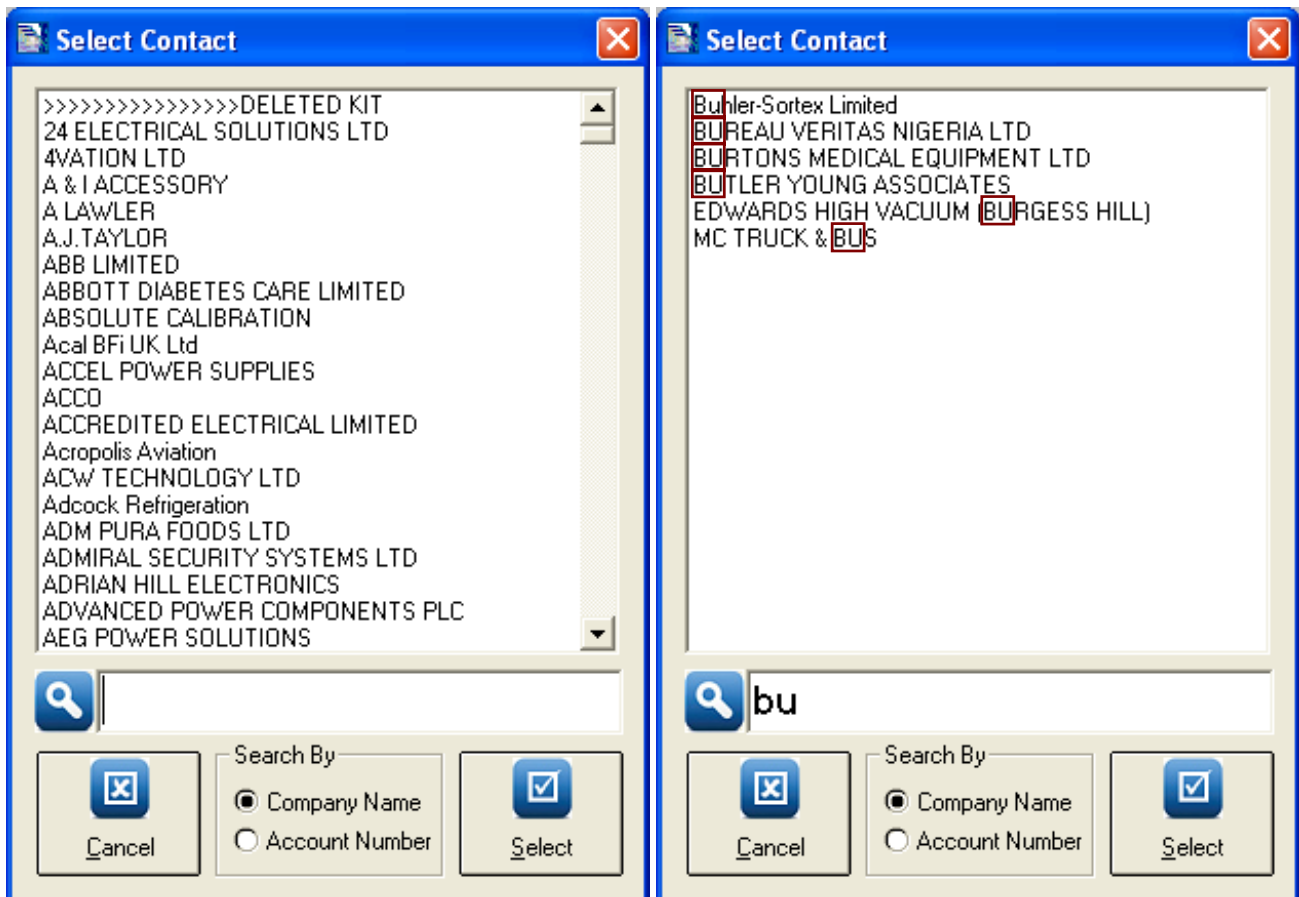
### LIST INSTRUMENTS DUE / OVERDUE FOR CALIBRATION [SPECIFIC CUSTOMER]

The list function allows a specific customer to be selected, and all instrument due or overdue for that customer to be listed on screen / printed as required.

To list instruments, select the ' List Instruments Due / Overdue for Calibration [Specific Customer]' menu item



Select the required customer – note by starting to type in the customer name the list will filter to match, eg. Typing 'bu' will filter to customers containing the character sequence 'bu'





## STEP 2 : PREVIEWING & PRINTING THE DUE/OVERDUE LIST

The list report design includes both DUE and OVERDUE instruments. For instruments which have been sub-contracted to you from other laboratories, the list will also detail their clients name so they may contact them directly :

**CALIBRATIONS DUE / OVERDUE FOR**  
**Buhler-Sortex Limited** ←

Due instruments listed with up to 3 weeks notice

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*Instruments OVERDUE For Calibration*

Instrument (Owner)	Cust. Ref.	Serial Number	Cal. Due
Hameg HMB118 LCR Bridge	LCP-2	053400067	04/03/20 13
Dreck DP1705 Digital Pressure Indicator	PM-3	70554250	05/03/20 13
Weller WSD 161 Soldering Iron Station	IRON-RD13		06/03/20 13
Weller PS 3D Soldering Iron Station	IRON-RD2		06/03/20 13
Weller WSD 130 Soldering Iron Station	IRON-RD8		06/03/20 13
Weller WSD 161 Soldering Iron Station	IRON-RD12		06/03/20 13
Weller WSD 161 Soldering Iron Station	IRON-RD10	0304	06/03/20 13
Weller WSD 161 Soldering Iron Station	IRON-RD11		06/03/20 13
USC 500N4 Gauge Meter	SURGE-1	V0845104419	06/03/20 13
Rohbeck Sta-16R Tape Measure	T-79		11/03/20 13
Mitutoyo QUC Hmital PI-0505 Micrometer	M-18	1112	13/03/20 13
Rabone & Cie Schenck 64FR Steel Rule	R-62		13/03/20 13
Moore & Wright ER 112 Steel Rule	R-60		13/03/20 13
Filet 189 Digital Mitrometer	DMM-RD15	86690134	14/03/20 13
Moore & Wright Engineers Square Engineers Square	ES-34		28/03/20 13
Universal Series 187 Protractor	PRO-G1		16/04/20 13
YPG 33.953mm & 39.979mm Hole Gauge	HG-1		16/04/20 13
Iso-Teck IDM 101 Digital Mitrometer	DMM-004	62100322	16/04/20 13
Universal 994 Protractor	PRO-G2	F10267	16/04/20 13
Filet 1630 Clamp Meter	EC LAMP-3	97670101	19/04/20 13
OSG M5 X 0.8-6G GO Thread Ring Gauge	TRG-03	4145-10	22/04/20 13
OSG M4 X 0.7-6G GO Thread Ring Gauge	TRG-02	4534-08	22/04/20 13
OSG M3 X 0.5-6G GO Thread Ring Gauge	TRG-01	3660-07	22/04/20 13
OSG M6 X 1-6G GO Thread Ring Gauge	TRG-04	4146-02	22/04/20 13
Avo M2006 Digital Mitrometer	DMM-APP1	M32777395	22/04/20 13
OSG M8 X 1.25-6G GO Thread Ring Gauge	TRG-05	4147-06	22/04/20 13
Filet 73 Series III Digital Mitrometer	DMM-APP3	69321000	23/04/20 13
Marconi MH-2 (10µW to 100mW) Powermeter	LPM-1	L025	23/04/20 13

**Customer Name**

**List of DUE and OVERDUE instruments (if any) Includes full description, serial number and calibration due date.**

The report template is named **DueList.rpt** and is located in the **ProCal/Reports/General** folder.

For help on these functions at any time click the 'Help Using Calibration reminder functions' menu item.

