

TRANSMILLE

SOLUTIONS IN CALIBRATION



PROCAL-TRACK

**VIRTUAL JOB SHEET &
INSTRUMENT STATUS**

ProCal-Track :: Virtual Job Sheet



– Overview

→ ProCal-Track provides an electronic version of a conventional job sheet. The virtual job sheets records full details of an instrument, its owner and a full service history, including a digital photo.

→ The job sheet is split into sections which can be easily viewed by clicking on the relevant tab

→ This information is stored in a central database, so it can be made accessible to any user on a network.

Virtual Job Sheet [System ID : ID00004]

Job No. : 6004 Certificate Add. : Delta Calibration Services, 4 Calibration House
Instrument : Transmille 2006A Customer Add. :

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Job Number : 6004 Service Details Sub Contract Details Do Not Recall

Date Received : 01/05/2002 Service Type : G : New Instrument Test
Order Number : 220304 Cert. Type :
Invoice Number : 1775 Quote Status :
Despatch Date : 10/05/2002 Quote No. :
Calibration Date : 08/05/2002 Service By : Transmille
Calibration Due : 07/05/2003 Under Warranty Mains Safety Check
Certificate No. : STD3213

Status : B : Requested Turn-around : 7 Days Cal. Interval : 52 Weeks

Use : Customer Comments -->
Booked in By : A.B. Smith Inst. Log

Close Print Menu Advanced Edit

Virtual Job Sheet [System ID : F17051227]

Job No. : 37714-1 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT
Instrument : Transmille 3010 Customer Add. :

Care Plan Expiry Date (If Applicable) : Do Not Recall

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Description : Multi-Product Calibrator
Manufacturer : Transmille
Model Number : 3010
Serial Number : 3010-06CN Auto
Cust. Ref. :
Procedure No. : 4048
PAT Test Code :
Site :
Department :
Location :
Cal. Source :
Date Acquired :
Date Scrapped :
Instrument Cost :

Close Print Menu Advanced Edit

ProCal-Track :: Virtual Job Sheet

– Job Information Tab



→ A full overview of the current job is available, including key information such as the Instrument Status. Service details and information relating to the calibration are displayed.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The main header displays "Job No. : 6004" and "Certificate Add. : Delta Calibration Services, 4 Calibration House". Below this, there are tabs for "Job Info", "Inst Details", "Cert Address", "Returned By", "Despatch Address", "Accessories", "Service Details", and "History". The "Job Info" tab is active, showing fields for Job Number (6004), Date Received (01/05/2002), Order Number (220304), Invoice Number (1775), Despatch Date (10/05/2002), Calibration Date (08/05/2002), Calibration Due (07/05/2003), and Certificate No. (STD3213). To the right, the "Service Details" section shows "Service Type : G : New Instrument Test", "Cert. Type", "Quote Status", "Quote No.", and "Service By : Transmille". There are also checkboxes for "Do Not Recall", "Under Wt", and "Mains Safety Check". At the bottom, there are fields for "Status : B : Requested", "Turn-around" (in days), "Cal. Interval : 52" (in weeks), "Use", "Booked in By : A.B. Smith", and buttons for "Close", "Print Menu", and "Advanced Edit".

- Print Job Sheet
- Print Packing ID Sheet
- Print Job Label
- Print ID Label
- Print Accessories Labels
- Print Mains Safety Label
- Print Job Completion Form
- Print Service Log
- Print Certificate & Label
- Print Despatch Note
- Print Serial Number Label Reports



Reprints of documents and labels can be made using the Print Menu button

ProCal-Track :: Virtual Job Sheet

– Instrument Details Tab



→ Detailed information relating to the instrument can be viewed, including the location, calibration source and costing.

→ If available an instrument photo is displayed – this is linked via the model number to an image library.

Virtual Job Sheet [System ID : F17051227]

Job No. : 37714-1 Certificate Add. : TRANSMILLE LTD., UNIT 4 SELECT
Instrument : Transmille 3010 Customer Add. : -----
Care Plan Expiry Date (If Applicable) : Do Not Recall

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Description : Multi-Product Calibrator ...
Manufacturer : Transmille ...
Model Number : 3010
Serial Number : 3010-06CN Auto
Cust. Ref. :
Procedure No. : 4048
PAT Test Code :
Site :
Department :
Location :
Cal. Source :
Date Acquired :
Date Scrapped :
Instrument Cost :

Close Print Menu Advanced Edit

 Buttons marked '...' allow the contents of the list to be customised. This reduces typing and allows preset information to be used.

ProCal-Track :: Virtual Job Sheet

– Certificate Address Tab



→ The certificate address is used to specifically store the instrument owners details. The address information can be stored in a customer database, using the Add Customer button.

Virtual Job Sheet [System ID : ID00004]

Job No. : 6004 Certificate Add. : Delta Calibration Services, 4 Calibration House
Instrument : Transmille 2006A Customer Add. : -----

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Account Number : A0004

Contact Name : Mr. D. Delta

Department Head : Mr. D. Delta

Company Name : Delta Calibration Services

Address : 4 Calibration House
The Drive
Anytown
AnyCounty. AB12 3CD.

Telephone : 0123 456789 Site : Unit 2

Fax : 0123 456780 Dept. : Mechanical

email : email@delta.com Location : 3rd Floor

Add Company

Tip : To add a new company name to the drop down list enter the details first, then click 'Add Customer'.

Close Print Menu Advanced Edit

To update a customer address, simply change the details on screen and click 'Add Customer'. The program will recognise an existing database entry and ask if the details should be updated.


ProCal-Track :: Virtual Job Sheet

– Returned By Address Tab



→ This optional address is used to store the address of a *third party* (ie. the company which returned the instrument, if it is not the owner of the instrument).

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The main header area contains the following information: Job No. : 6004, Certificate Add. : Delta Calibration Services, 4 Calibration House, Instrument : Transmille 2006A, and Customer Add. : -----. Below the header is a tabbed interface with tabs for Job Info, Inst Details, Cert Address, Returned By (selected), Despatch Address, Accessories, Service Details, and History. The "Returned By" tab contains several input fields: Account Number (dropdown), Contact Name, Department Head, Company Name (dropdown), Address (multiple lines), Telephone, Fax, email, Site, Dept., and Location. There is also an "Add Company" button with a printer icon. At the bottom of the form, there is a tip: "Tip : This address is only needed if the instrument has been returned by a company other than on the certificate." The window has "Close", "Print Menu", and "Advanced Edit" buttons at the bottom.

 This should be left blank if the instrument was returned by the owner of the instrument.

ProCal-Track :: Virtual Job Sheet

– Despatch Address Tab



→ This optional address is used to store the despatch address, if it is different to the certificate address.

Virtual Job Sheet [System ID : ID00004]

Job No. : 6004 Certificate Add. : Delta Calibration Services, 4 Calibration House
Instrument : Transmille 2006A Customer Add. : -----

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Account Number : A0004

Contact Name : Mr. D. Delta

Department Head : Mr. D. Delta

Company Name : Delta Calibration Services

Address : 4 Calibration House
The Drive
Anytown
AnyCounty. AB12 3CD.

Telephone : 0123 456789 Site : Unit 2
Fax : 0123 456780 Dept. : Mechanical
email : email@delta.com Location : 3rd Floor

Despatched Via : DATAPOST

Tip : This address is only needed if the instrument is not being returned to the certificate or customer addresses.

Close Print Menu Advanced Edit

 This can be left blank if the despatch address is the same as the certificate address.

Note : ProCal-Track will automatically complete this address when despatching an instrument

ProCal-Track :: Virtual Job Sheet

– Accessories Tab



→ Accessories are logged when the instrument is booked in. This can be used in conjunction with barcode scanning to ensure despatch is not possible without all accessories being available.

The screenshot shows a software window titled "Virtual Job Sheet [System ID : ID00004]". The window has a dark blue header with the following information: Job No. : 6004, Certificate Add. : Delta Calibration Services, 4 Calibration House, Instrument : Transmille 2006A, and Customer Add. : -----. Below the header is a tabbed interface with tabs for Job Info, Inst Details, Cert Address, Returned By, Despatch Address, Accessories (selected), Service Details, and History. The Accessories tab contains a list of checkboxes: None, Mains Lead, packing (checked), Manual (checked), Test Leads, Case / Cover, Test Probes, Carry Case, and Transit Case. To the right of this list are two buttons: "Edit Accessories List" (with a pencil icon) and "Update Screen" (with a computer monitor icon). Below the list is a text field containing "Manual,packing." and a checked checkbox for "Print Accessories Labels [Goods Inwards]". At the bottom of the window are three buttons: "Close", "Print Menu", and "Advanced Edit". A tip icon is located at the bottom left of the main content area.

 When booking an instrument in, a bar-coded label can be printed for all accessories

The accessory list can be customised by clicking the Edit Accessories List button

ProCal-Track :: Virtual Job Sheet

– Service Details Tab :: Parts Used



→ All parts used can be logged, including cost. This can be accessed directly within ProCal as well as here in ProCal-Track.

→ This information can be used to automatically produce a Repair Estimate using the built in Crystal Reports support.

Virtual Job Sheet [System ID : ID00004]

Job No. : 6004 Certificate Add. : Delta Calibration Services, 4 Calibration House
Instrument : Transmille 2006A Customer Add. : -----

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Parts Used | Engineers Report | Job Comments | Quote

Code	Description	Quantity	Cost (Each)
	Oscilloscope Calibration Module	1	£ 2455
	Oscilloscope BNC Connector	1	£ 0.00
	Oscilloscope Connection Lead	1	£ 0.00
			£
			£
			£
			£
			£
			£
			£
			£

Total Parts Cost
£ 2455.00

Repair Cost
£

Calibration Cost
£ 30.50

Repair Time

Cal. / Test Time
10:13:27

Engineer

Edit Parts List

Close Print Menu Advanced Edit



The parts list can be customised by clicking the Edit Parts List button

The Cal./ Test Time is automatically updated by ProCal (if in use)

ProCal-Track :: Virtual Job Sheet

– Service Details Tab :: Engineers Report



→ Full details of any work carried out on this instrument can be recorded. This information is an internal record, and is not printed out on any customer documentation.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The main area is divided into several sections. At the top, there are fields for "Job No. : 6004", "Instrument : Transmille 2006A", "Certificate Add. : Delta Calibration Services, 4 Calibration House", and "Customer Add. : -----". Below this is a navigation bar with tabs: "Job Info", "Inst Details", "Cert Address", "Returned By", "Despatch Address", "Accessories", "Service Details", and "History". The "Service Details" tab is active, and within it, the "Engineers Report" sub-tab is selected. The "Engineers Report" area contains a text box with the text: "Instrument was upgraded with Oscilloscope module, including external BNC connector and internal connection lead." To the right of the text box is a summary of costs and times: "Total Parts Cost £ 2455.00", "Repair Cost £", "Calibration Cost £ 30.50", "Repair Time", "Cal. / Test Time 10:13:27", and "Engineer" with a dropdown menu. At the bottom of the window are three buttons: "Close", "Print Menu", and "Advanced Edit".

ProCal-Track :: Virtual Job Sheet

– Service Details Tab :: Engineers Report

➔ Job comments are recorded for use on the Service Report which can be issued to the owner of the instrument. Information which is relevant to the calibration performed can be recorded here.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The interface is divided into several sections. At the top, there are fields for "Job No. : 6004", "Instrument : Transmille 2006A", "Certificate Add. : Delta Calibration Services, 4 Calibration House", and "Customer Add. : -----". Below this is a navigation bar with tabs: "Job Info", "Inst Details", "Cert Address", "Returned By", "Despatch Address", "Accessories", "Service Details", and "History". The "Service Details" tab is active, and within it, the "Engineers Report" sub-tab is selected. The main area contains a text box with "All Tests passed calibration." and a "New Instrument" dropdown menu. To the right, there are several cost and time fields: "Total Parts Cost £ 2455.00", "Repair Cost £", "Calibration Cost £ 30.50", "Repair Time", and "Cal. / Test Time 10:13:27". There is also an "Engineer" dropdown menu and an "Edit Parts List" button. At the bottom, there are "Close", "Print Menu", and "Advanced Edit" buttons.

 These drop down lists can be customised by clicking the '...' buttons (each list can be customised separately)

ProCal-Track :: Virtual Job Sheet

– Service Details Tab :: Quote



→ A custom quotation created in WordPad can be linked to this specific job and be customised within WordPad.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The main area is divided into several tabs: "Job Info", "Inst Details", "Cert Address", "Returned By", "Despatch Address", "Accessories", "Service Details", and "History". The "Service Details" tab is active, and within it, the "Quote" sub-tab is selected. The "Quote" sub-tab contains a large text area with a "View / Edit Quote" button and a document icon. To the right of the text area, there are several input fields for cost and time: "Total Parts Cost" (£ 2455.00), "Repair Cost" (£), "Calibration Cost" (£ 30.50), "Repair Time", and "Cal. / Test Time" (10:13:27). There is also a dropdown menu for "Engineer" and an "Edit Parts List" button. At the bottom of the window, there are three buttons: "Close", "Print Menu", and "Advanced Edit".

 This wordpad document has largely been superseded by the use of a Crystal Report Quotation.

ProCal-Track :: Virtual Job Sheet

– Service Details Tab :: History



→ All events in the instruments 'life' are summarised. Clicking on an item displays this historical data under the Job Info tab.

→ When an old job is selected, information is locked (for viewing only) until the UNLOCK button is clicked.


Virtual Job Sheet [System ID : ID00002]

Job No. : R0004018 Certificate Add. : Beta Calibrations, 2 Calibration House
Instrument : Fluke 187 Customer Add. : -----

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Job Number	Cert. Number	Calibration Date	Service Type	Calibration Type
5827	A05434	04/04/2002	New Instrument Test	UKAS Certificate
8249-1	A06136	05/04/2003	Calibration Only	UKAS Certificate
11283-1	A06863	05/03/2004	Calibration Only	UKAS Certificate
R0004018	00022	22/08/2005	Calibration Only	UKAS Certificate

Close Print Menu Advanced Edit

 When an old job is selected, the info bar at the top of the screen turns RED

Virtual Job Sheet [System ID : ID00002]

Job No. : R0004018 Certificate Add. : Beta Calibrations, 2 Calibration House
Instrument : Fluke 187 Customer Add. : -----

Job Info | Inst Details | Cert Address | Returned By | Despatch Address | Accessories | Service Details | History

Job Number	Cert. Number	Calibration Date	Service Type	Calibration Type
5827	A05434	04/04/2002	Calibration Only	UKAS Certificate
8249-1	A06136	05/04/2003	Calibration Only	UKAS Certificate
11283-1	A06863	05/03/2004	Calibration Only	UKAS Certificate
R0004018	00022	22/08/2005	Calibration Only	UKAS Certificate

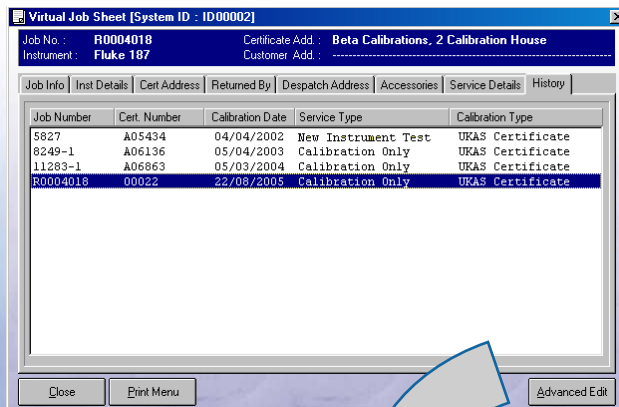
Close Print Menu Tip: The data displayed is an OLD job and is currently LOCKED. Click unlock to access. Unlock Advanced Edit

ProCal-Track :: Virtual Job Sheet

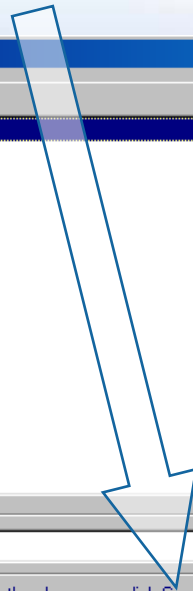
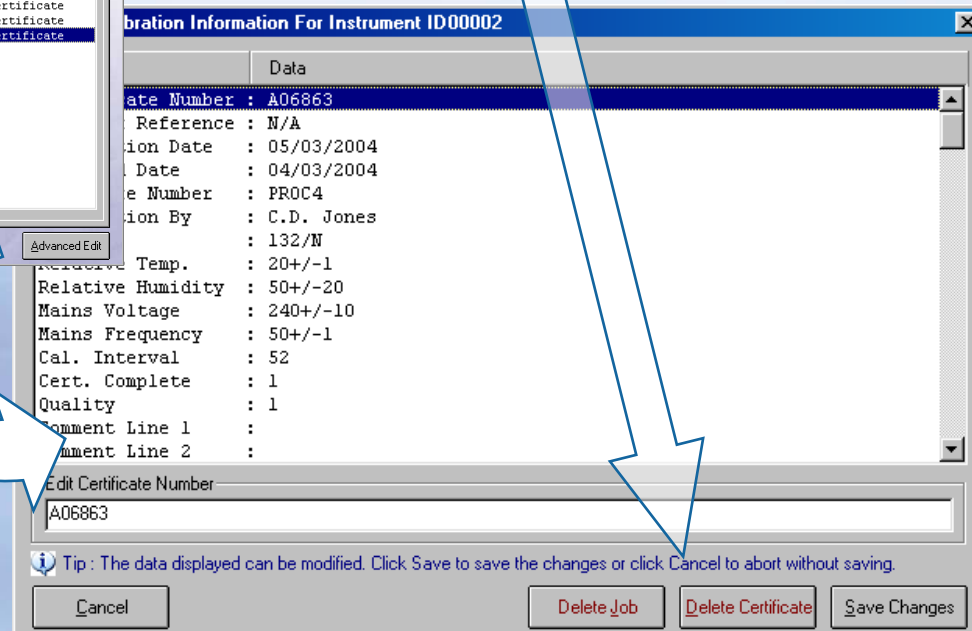
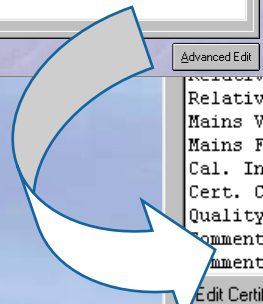
– Service Details Tab :: Advanced Edit



➔ The Advanced Edit function allows data to be changed for the currently selected job. This includes some information such as the Crystal Report and the Traceable Instruments used, which is not accessible elsewhere. This screen also includes advanced delete function.



This screen also allows certificates and/or jobs to be deleted.



Tip : The data displayed can be modified. Click Save to save the changes or click Cancel to abort without saving.



ProCal-Track :: Instrument Status



- Statuses track instruments through the system.
- Status is automatically controlled - functions such as Goods Inwards, Process Paperwork and Despatch Instrument changing the status as appropriate.
- A specific status can be set to indicate the exact progress of an instrument, ideal for instant lookup for customer enquiries.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The interface is divided into several sections. At the top, there are fields for "Job No. : 6004", "Certificate Add. : Delta Calibration Services, 4 Calibration House", "Instrument : Transmille 2006A", and "Customer Add. : -----". Below this is a tabbed interface with tabs for "Job Info", "Inst Details", "Cert Address", "Returned By", "Despatch Address", "Accessories", "Service Details", and "History". The "Job Info" tab is active, showing fields for "Job Number : 6004", "Date Received : 01/05/2002", "Order Number : 220304", "Invoice Number : 1775", "Despatch Date : 10/05/2002", "Calibration Date : 08/05/2002", "Calibration Due : 07/05/2003", and "Certificate No. : STD3213". The "Service Details" tab is also visible, showing "Service Type : G : New Instrument Test", "Cert. Type :", "Quote Status :", "Quote No. :", "Service By : Transmille", and a "Mains Safety Check" checkbox. At the bottom, there are fields for "Status : A : With customer", "Lead Time : 7 Days", "Cal. Interval : 52 Weeks", "Use :", "Customer Comments -->", "Booked in By : A.B. Smith", and "Inst. Log". There are buttons for "Close", "Print Menu", and "Advanced Edit".

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- A list of instrument statuses, each with a letter code and a description. The list is displayed in a scrollable window. The status "A : With customer" is highlighted in blue. A white arrow points from the "Status" field in the screenshot above to this list.
- A : With customer
 - B : Requested
 - C : Overdue
 - D : Lost
 - E : Received
 - F : Received - awaiting quote
 - G : Received - awaiting info. / order
 - H : Arrived damaged
 - I : Before cal. done - awaiting adj.
 - J : Calibration Incomplete
 - K : Sent for cal. / repair (External)
 - L : Sent for repair (Internal)
 - M : Cal. done - awaiting paperwork
 - N : In despatch
 - O : Requested (Posted)
 - P : OverDue (Posted)
 - Q : Under Construction
 - R : Allocated to Customer
 - S : In Stock
 - T : Awaiting Parts



The status can be manually set if required