



PROCAL-TRACK

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 : 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

Description : Laboratory Reference
Manufacturer : Transmille
Model Number : 2006A
Serial Number : 104386D2
Cust. Ref. :
Procedure No. : 5
PAT Test Code :
Site : Unit 2
Department : Mechanical
Location : 3rd Floor



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.

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 W... Mains Safety Check

Certificate No. : STD3213

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

Use : Custom... <-->

Booked in By : A.B. Smith Inst. Log

Close Print Menu 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.

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 (selected), Cert Address, Returned By, Despatch Address, Accessories, Service Details, and History. The main area contains several input fields and dropdown menus, many with "..." buttons for customization. The fields include: Description (Laboratory Reference), Manufacturer (Transmille), Model Number (2006A), Serial Number (104386D2), Cust. Ref., Procedure No. (5), PAT Test Code, Site (Unit 2), Department (Mechanical), Location (3rd Floor), Cal. Source, Date Acquired, Date Scrapped, and Instrument Cost. There is also an "Auto" button next to the Serial Number field. At the bottom of the window are buttons for Close, Print Menu, and 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.

The screenshot shows a software window titled "Virtual Job Sheet [System ID : ID00004]". The window has a dark blue header bar 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 (selected), Returned By, Despatch Address, Accessories, Service Details, and History. The main content area contains a form with the following fields: 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), and Location (3rd Floor). There is an "Add Company" button with a printer icon. At the bottom, there are buttons for "Close", "Print Menu", and "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 top section displays "Job No. : 6004" and "Instrument : Transmille 2006A". Below this, "Certificate Add. : Delta Calibration Services, 4 Calibration House" and "Customer Add. : -----" are shown. A tabbed interface includes "Job Info", "Inst Details", "Cert Address", "Returned By" (selected), "Despatch Address", "Accessories", "Service Details", and "History". The "Returned By" tab contains fields for "Account Number", "Contact Name", "Department Head", "Company Name", and "Address" (with multiple lines). There is an "Add Company" button with a printer icon. Below these are fields for "Telephone", "Fax", "email", "Site", "Dept.", and "Location". A tip icon and text state: "Tip : This address is only needed if the instrument has been returned by a company other than on the certificate." At the bottom are "Close", "Print Menu", and "Advanced Edit" buttons.

 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.

The screenshot shows a software window titled "Virtual Job Sheet [System ID : ID00004]". The window has a dark blue header bar 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 (which is currently selected), Accessories, Service Details, and History. The Despatch Address tab contains several input fields: 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), and Location (3rd Floor). There is also a "Despatched Via" dropdown menu set to "DATAPOST" and an "Add Company" button. At the bottom of the window are buttons for "Close", "Print Menu", and "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.

A screenshot of the "Virtual Job Sheet" software interface. The window title is "Virtual Job Sheet [System ID : ID00004]". The interface shows a tabbed menu with "Accessories" selected. The "Accessories" tab contains a list of checkboxes for various accessories: 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" and "Update Screen". 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 visible at the bottom left of the main content area.

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

None
 Mains Lead
 packing
 Manual
 Test Leads
 Case / Cover
 Test Probes
 Carry Case
 Transit Case

Accessories : Manual,packing.
 Print Accessories Labels [Goods Inwards]

Tip : To add accessories (up to 20) click 'Edit Accessories List'. To see the changes immediately click 'Update Screen'

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

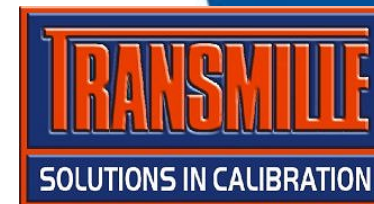
Close Print Menu Advanced Edit

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 header displays "Job No. : 6004" and "Instrument : Transmille 2006A". The "Certificate Add." is "Delta Calibration Services, 4 Calibration House" and the "Customer Add." is blank. Below the header is a tabbed menu with "Service Details" selected. Under "Service Details", the "Engineers Report" sub-tab is active. The main text area contains the text: "Instrument was upgraded with Oscilloscope module, including external BNC connector and internal connection lead." To the right of the text area are several data fields: "Total Parts Cost" (£ 2455.00), "Repair Cost" (£), "Calibration Cost" (£ 30.50), "Repair Time" (blank), "Cal. / Test Time" (10:13:27), and "Engineer" (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 top section displays job details: Job No. : 6004, Certificate Add. : Delta Calibration Services, 4 Calibration House, Instrument : Transmille 2006A, and Customer Add. : -----
The interface has several tabs: Job Info, Inst Details, Cert Address, Returned By, Despatch Address, Accessories, Service Details (selected), and History. Below these are sub-tabs: Parts Used, Engineers Report (selected), Job Comments, and Quote.
The main area contains two dropdown menus with "..." buttons: "New Instrument" and "All Tests passed calibration."
On the right side, there are several data fields: Total Parts Cost (£ 2455.00), Repair Cost (£), Calibration Cost (£ 30.50), Repair Time, Cal. / Test Time (10:13:27), and Engineer (a dropdown menu). An "Edit Parts List" button is located below these fields.
At the bottom, there are three buttons: "Close", "Print Menu", and "Advanced Edit".

 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.

The screenshot shows a software window titled "Virtual Job Sheet [System ID : ID00004]". The window has a dark blue header with white text for "Job No. : 6004", "Instrument : Transmille 2006A", "Certificate Add. : Delta Calibration Services, 4 Calibration House", and "Customer Add. : -----". Below the header is a tabbed interface with tabs for "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 main area contains a large grey box with a yellow folder icon and a button labeled "View / Edit Quote". To the right of this box is a summary panel with the following fields: "Total Parts Cost" (£ 2455.00), "Repair Cost" (£), "Calibration Cost" (£ 30.50), "Repair Time" (empty), "Cal. / Test Time" (10:13:27), and "Engineer" (a dropdown menu). At the bottom of the window are buttons for "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.

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

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

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

ProCal-Track :: Virtual Job Sheet

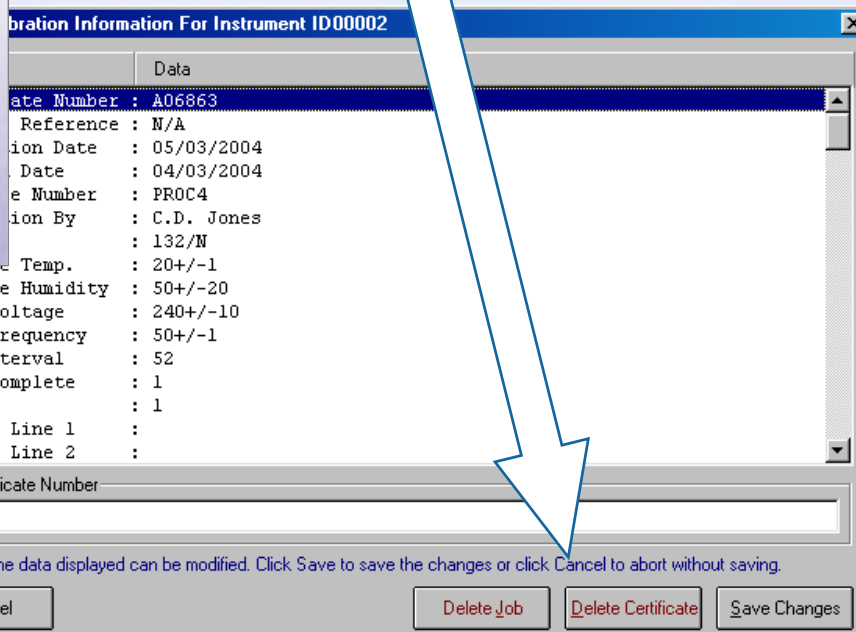
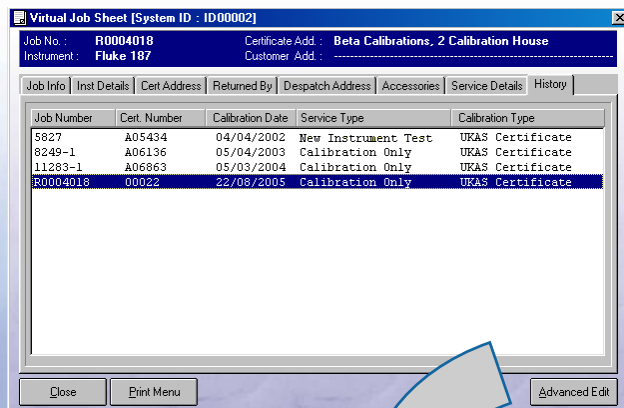
– Service Details Tab :: Advanced Edit



→ 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.



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 ProCal-Track software interface. The main window is titled "Virtual Job Sheet [System ID : ID00004]". It displays job information for Job No. 6004 and Instrument Transmille 2006A. The status is currently set to "A : With customer". A dropdown menu is open, showing a list of status options from A to T. A white arrow points from the "A : With customer" status in the main window to the corresponding option in the dropdown menu. The status list includes: 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, and T : Awaiting Parts. The interface also shows fields for Job Number, Date Received, Order Number, Invoice Number, Despatch Date, Calibration Date, Calibration Due, Certificate No., Service Type, Cert. Type, Quote Status, Quote No., Service By, and a "Do Not Recall" checkbox. There are buttons for "Close", "Print Menu", and "Advanced Edit".



The status can be manually set if required