QMSOFT® HowTo - Checking the due date

Release 8.1

L&W Gesellschaft für Fertigungsmesstechnik und Qualitätssicherung mbH

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Contents

Settings for "overdue" checks

If you have previously used the "Overdue check" option in the QMSOFT®/QM-MANAGE test equipment management to automatically display due test equipment when opening the database, you will have to completely reconfigure this.

Overdue checks can be used very flexibly and can be started both manually and automatically. If an automatic start is desired, a corresponding task must always be created in the QMSOFT® Task scheduler (call via "House" icon / General administration) [Fig. 1.1]
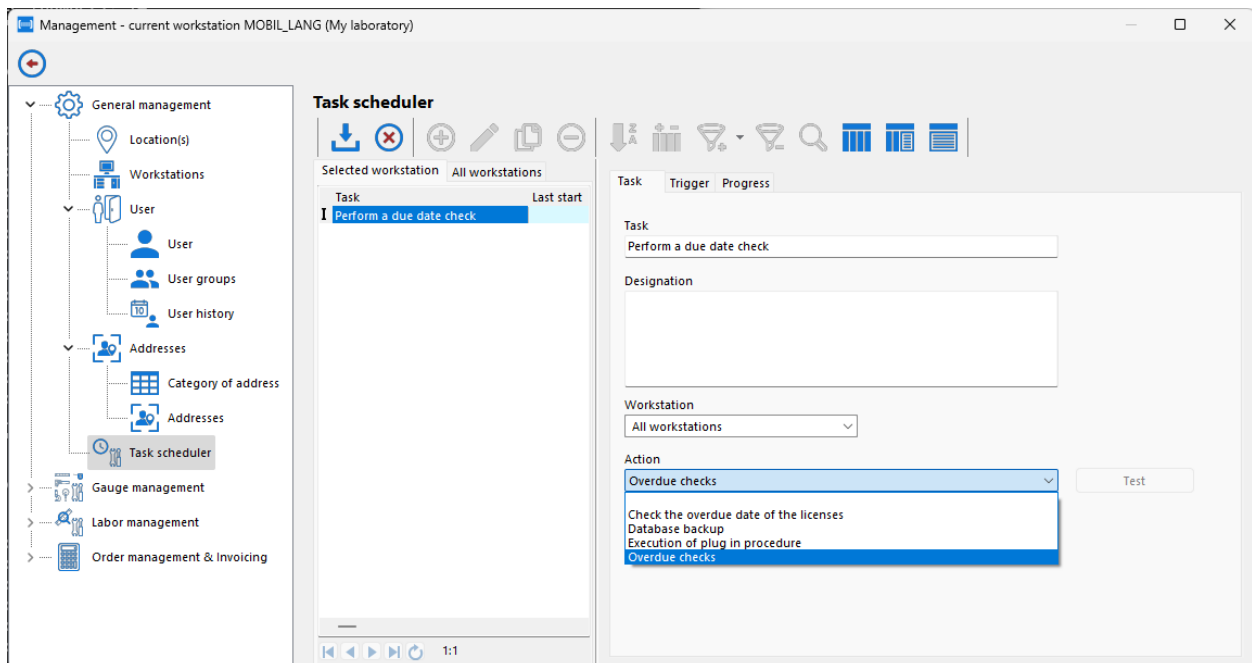

Fig. 1.1: QMSOFT® Task scheduler.

Give the test a name and select `Overdue checks` in the *Action* field. Then define a starting point for the execution of

the test on the *Trigger* tab page. For a simple test - analogous to version 7 - select *When opening a database* [Fig. 1.2].
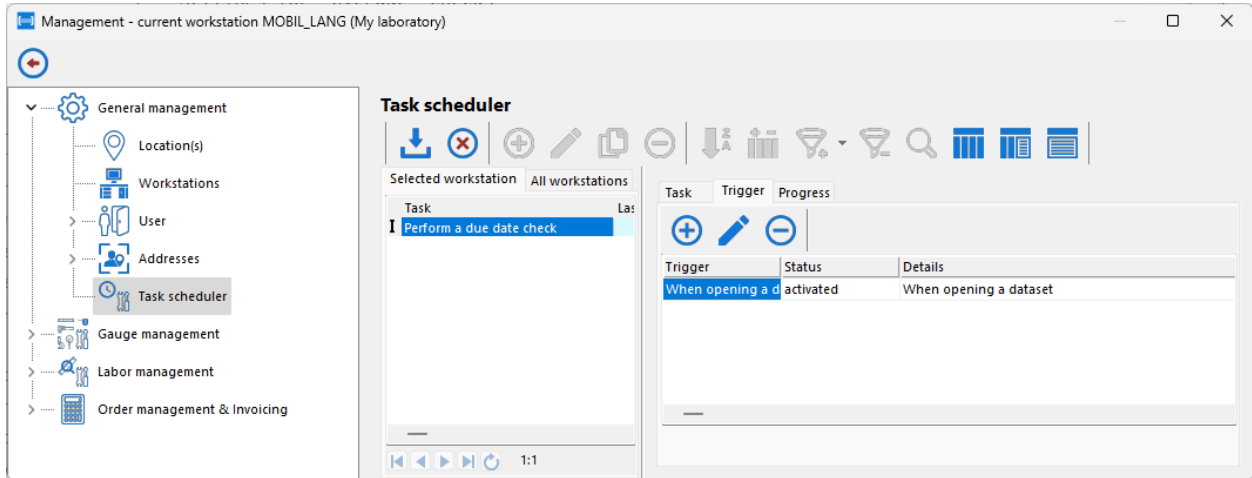

Fig. 1.2: QMSOFT® Task scheduler - edit trigger (event).

All other settings for the execution of a due date test, which call up test equipment for calibration (or other measures), has to be done in the QMSOFT®/QM-MANAGE program after opening the associated dataset (client).

Due to the various setting options of an overdue check, some other system configurations must also be considered in connection with these.

> ℹ️ **Note**
>
> You can configure the overdue check directly in the gauge management program QMSOFT®/QM-MANAGE under the menu *Settings → Overdue checks*. But before, please define at first the "filter" and the action(s) to be performed as described below.

Here you will find a short overview what settings are needed for an overdue check and should therefore be configured in advance:

- **"FILTER" - Select the gauges / test equipment which are affected by the test**

  the selection of gauges which are affected is basically done by using a "Filter"; the following screen [Fig. 1.3] is showing an example of a typical filter;
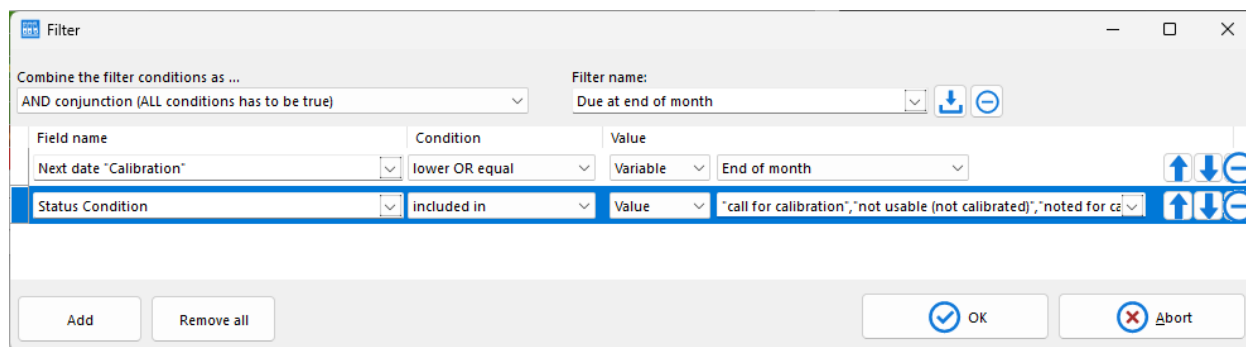
Fig. 1.3: Filter definiton.

this filter will select all gauges which will be due at the end of the month and fulfill the selected characteristics for the status (exclusion of scrapped test equipment and similar things). Please save the filter as a "System filter" [Fig. 1.4] under a meaningful name!
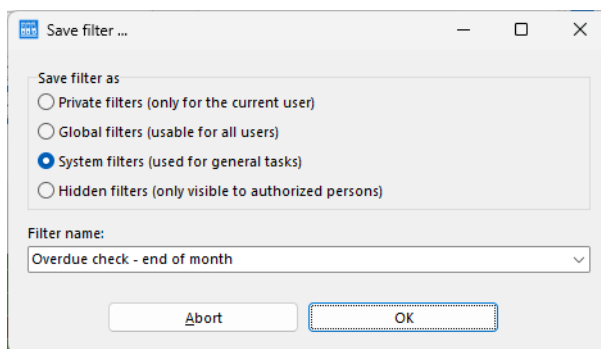

Fig. 1.4: Save filter definiton as "System filter".

- **what should be done?**

  Here you will find the options: "Show message ", "Execute a gauge action", "Send e-mail" Here it is also important to ensure that all required information is available in the system and correctly configured. Should an "action" be carried out when the test will be done, e.g. to change the status of the test equipment, the corresponding action must of course be defined before. When sending e-mails, please note that both the e-mail addresses of the recipients and your sender address are entered. The e-mail sender address is configured in the user administration for the user selected as "Person for auto-mail function" in the laboratory administration.

- **when is the test carried out?**

  Here you can choose between "Manual start" ("default" setting) and tasks defined in the Task scheduler. With "manual start" you start the test by calling the function after opening the database. The automatic execution depends on the "trigger" which you have defined in the Task scheduler.

Here, you can now see an example for defining an "overdue check" [Fig. 1.5]:
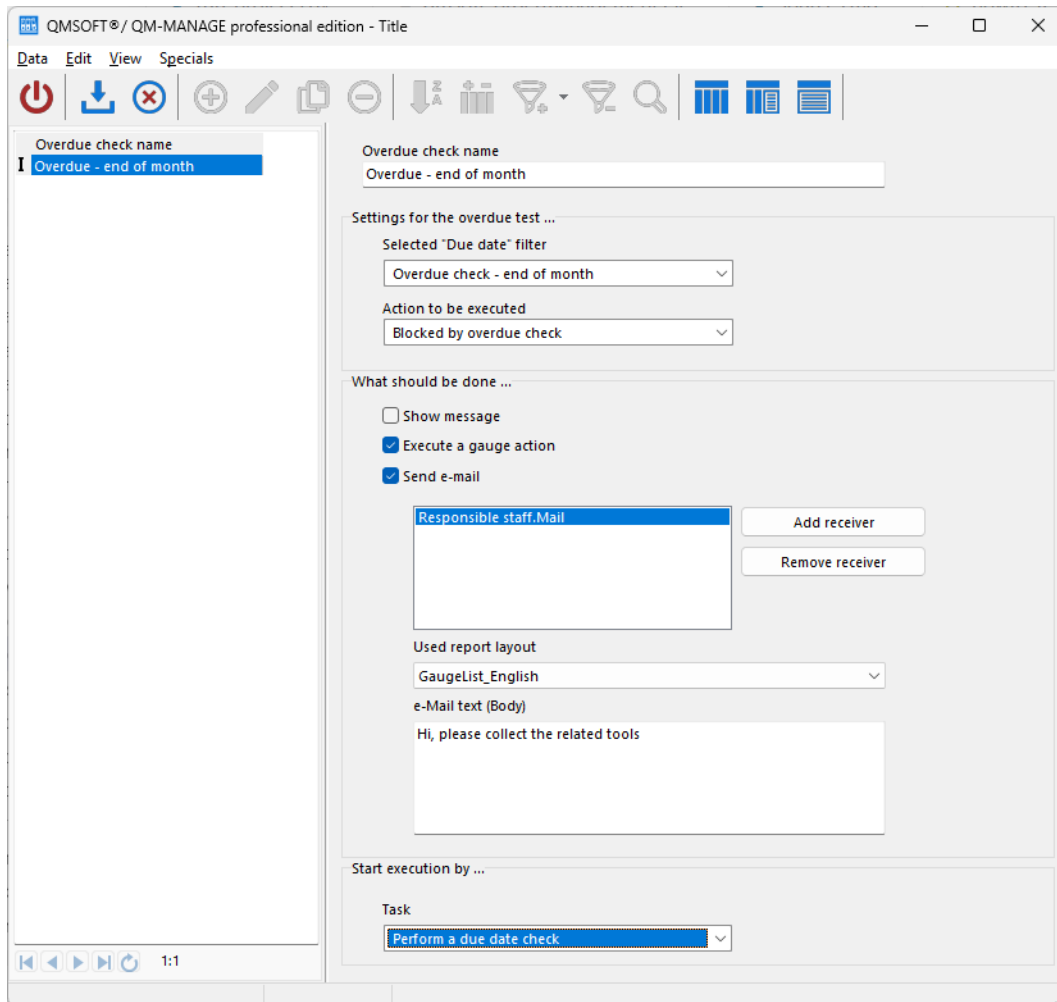
Fig. 1.5: Definition of an overdue check.

- When creating a due date test, first give it a name. Then select a predefined filter that defines the tool selection for the following activities. If an action is to be carried out, specify it here.

- Then select the operations to be selected from the list provided. If e-mail is to be sent, specify the recipient here. For example, if you have saved the e-mail address as additional information on the "current location", the list of the test equipment concerned is automatically split up for the respective addressee of the current location.

- The report layout for the generated report is selected via the "Used report layout" setting. When sent by e-mail, the generated report is sent as a PDF document in the e-mail attachment

- If you want, you can enter a general e-mail text in the related field;

- At the end of the configuration, set in the "Start execution by" option whether the due date test is started manually or automatically. The execution time for automatic execution is configured in the "Task scheduler" function using the "Trigger" defined there.

> ℹ **Note**
>
> The QM-TaskService must be configured and started for an automatic execution of an overdue test outside of QMSOFT®!

> ⚠️ **Warning**
>
> For QMSOFT® versions from November 16, 2021 and later, the right to execute the due date test must also be set in the user administration [Fig. 1.6].
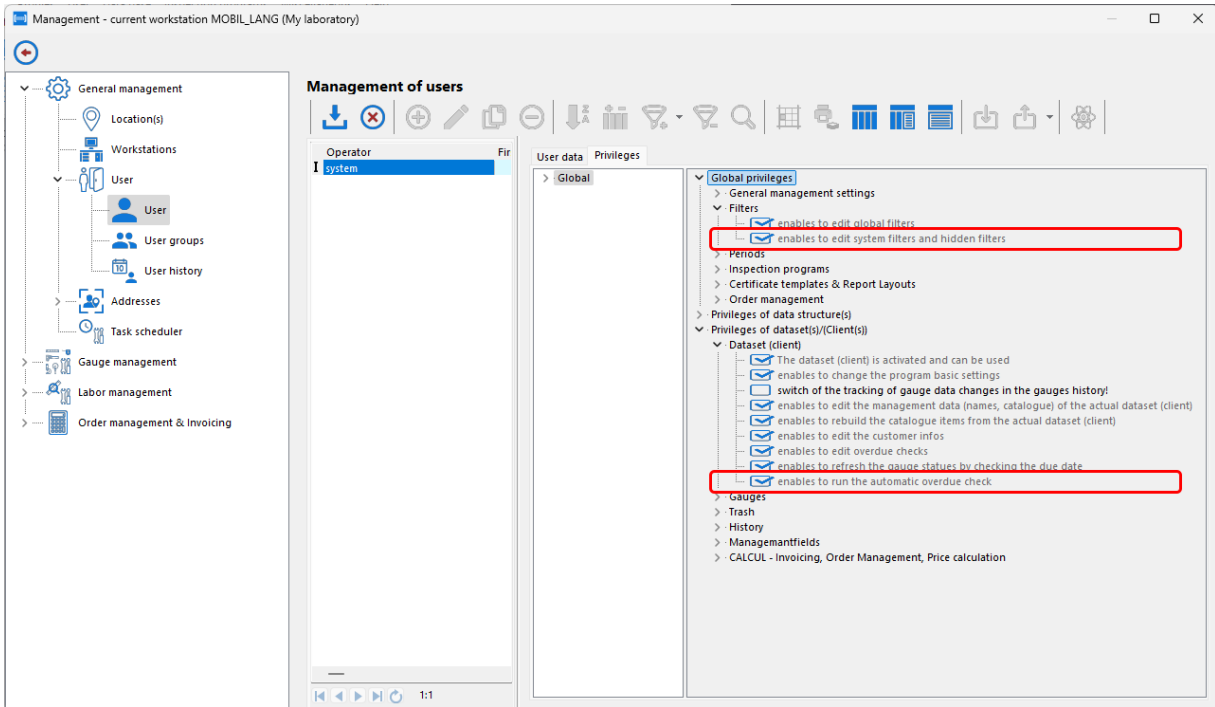

Fig. 1.6: *General Management → User Management → Privileges*.

Example of creating an automatic due date test

2.1 Scenario Description

It is to be checked which gauges are due for calibration in the next 8 weeks. Gauges that currently have a status of "usable" is taken into account.

The selected gauges should be given a new status of "marked for calibration". A change to the test date (last, next test) should not be made. Changes to other test fields are not desired.

The check should be carried out every Friday starting on July 5, 2024 at 9:00 a.m.

A list of the marked gauges should be sent automatically by email.

The sender of the email should be the Head of Quality Assurance (Martin Spät).

The recipients of the gauge list are:

- Head of Quality Assurance (Martin Spät)
- Head of Tool Issue (Cornelia Krause)

2.2 Requirements

- The user who sets up the due date test should have the following authorizations within QMSOFT®:
  - Right to create system filters
  - Right to create actions
  - Right to create tasks
  - Right to create due date tests
  - Right to automatically execute due date tests

- If a protocol template is also to be used, the user may need the right to change the template (*Laboratory management --> User --> Access rights --> General --> Protocol templates and report layouts --> allows editing protocol templates*)

- The users are created including the user's email address

- The outgoing mail server (SMTP) is also defined for the user "Martin Spät"

- The access right: "allows automatic execution of due date tests" is active for the user "Martin Spät"

- For the location, the user "Martin Late" (with his login: mspaet)

- In addition, the following status definitions are stored:

  - "usable"

  - "usable (limited)"

  - "usable (ONLY determination of the actual status)"

  - "usable (will not be checked)"

  - "marked for calibration"

2.3 Measures for creating the due date test

- Define task
- Define filter
- Define action
- Define due date test

2.3.1 Define task

From the example:

The check should be carried out every Friday starting on July 5, 2024 at 9:00 a.m.
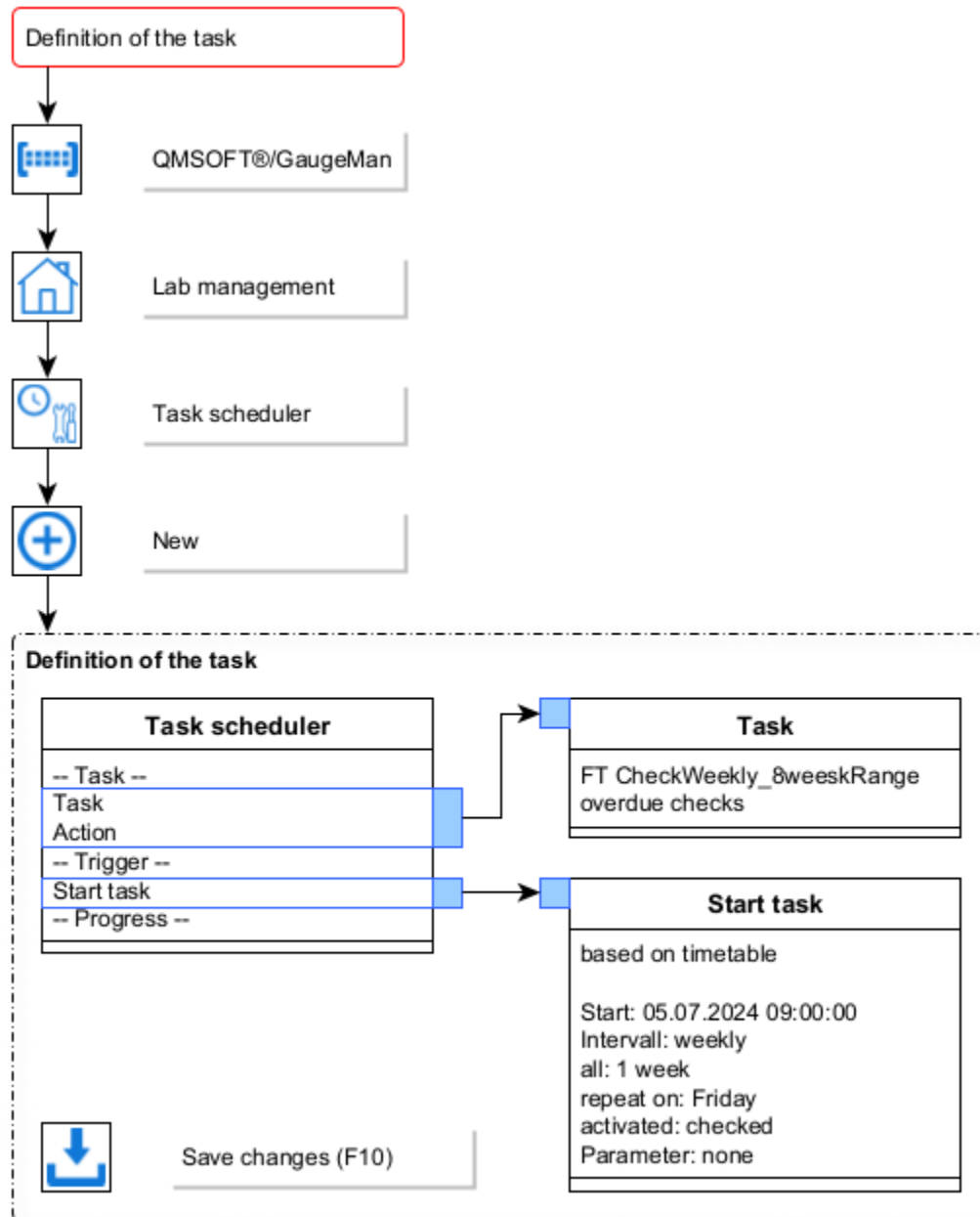
Realization . . .

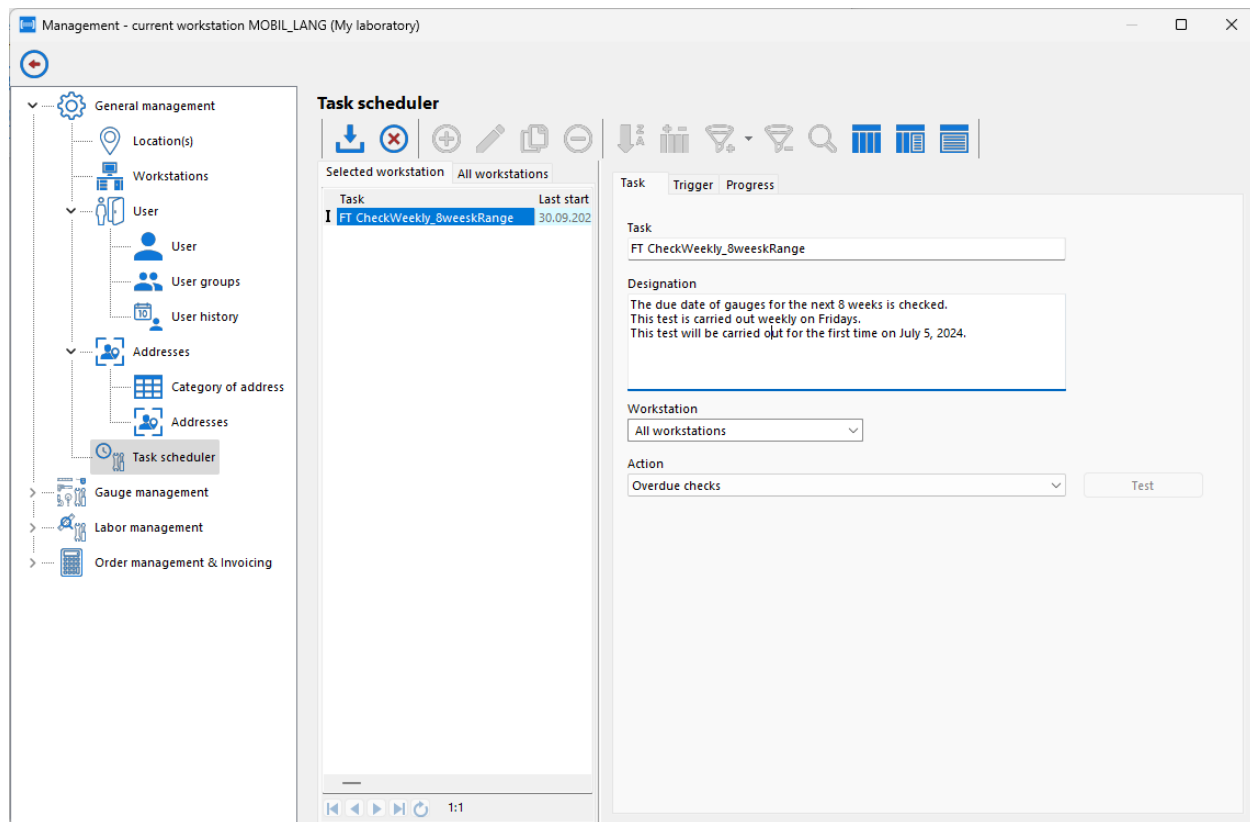Fig. 2.3.1: Definition of the task (Schema).

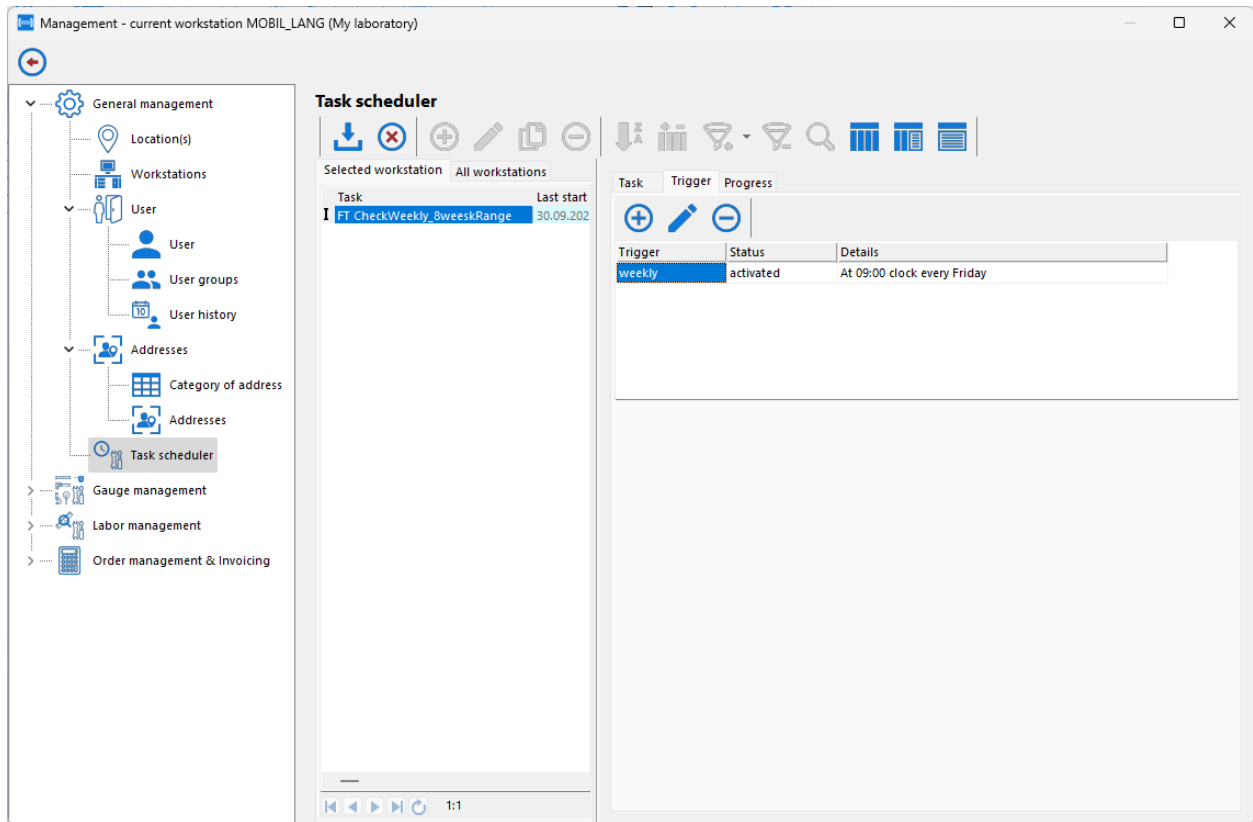Fig. 2.3.2: Definition of the task - Task (Sample).

Fig. 2.3.3: Definition of the task - Trigger (Sample).

2.3.2 Filter definieren

From the example:

It is to be checked which gauges are due for calibration in the next 8 weeks. Gauges that currently have a status of "usable" is taken into account.
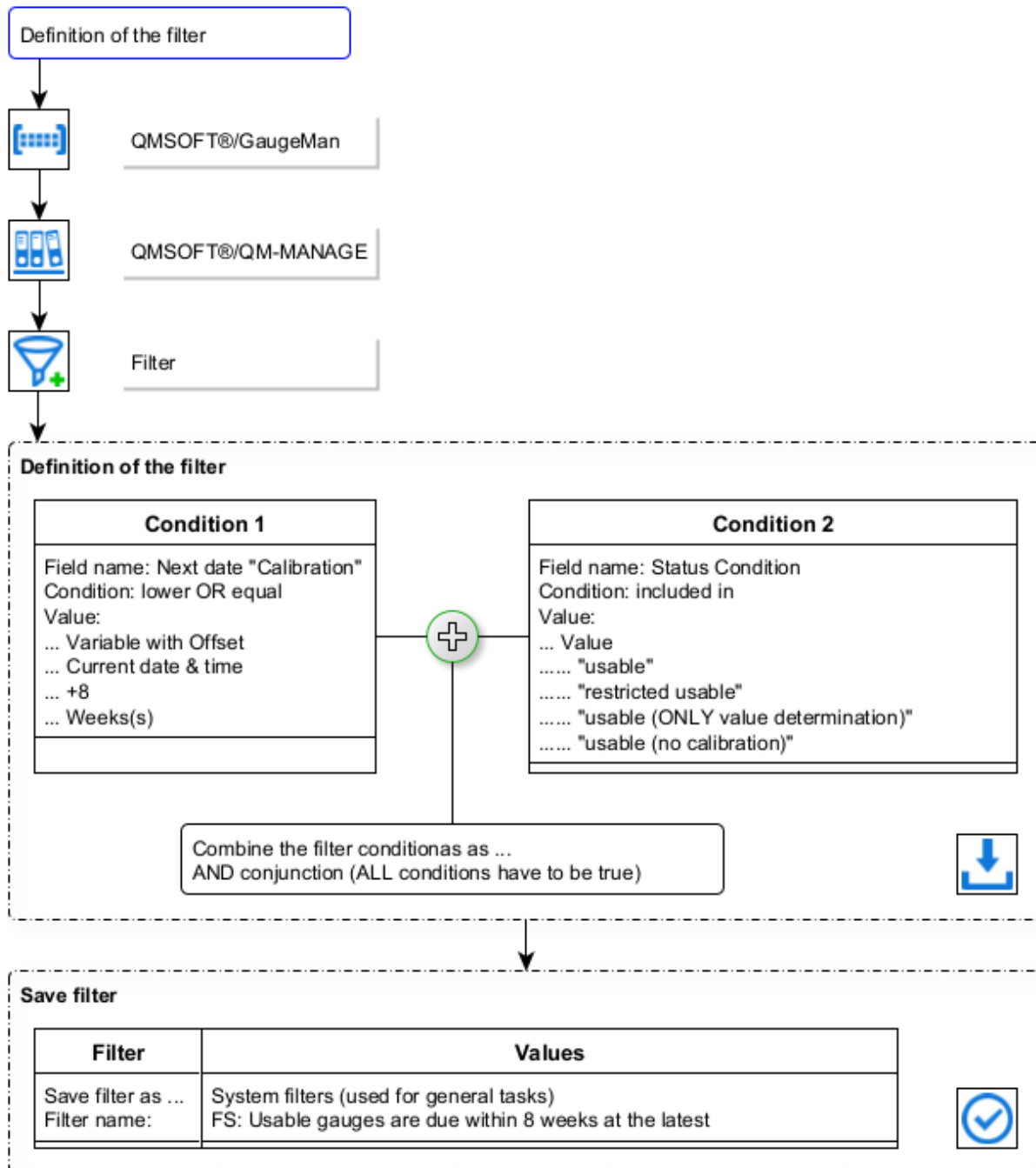
Realization . . .

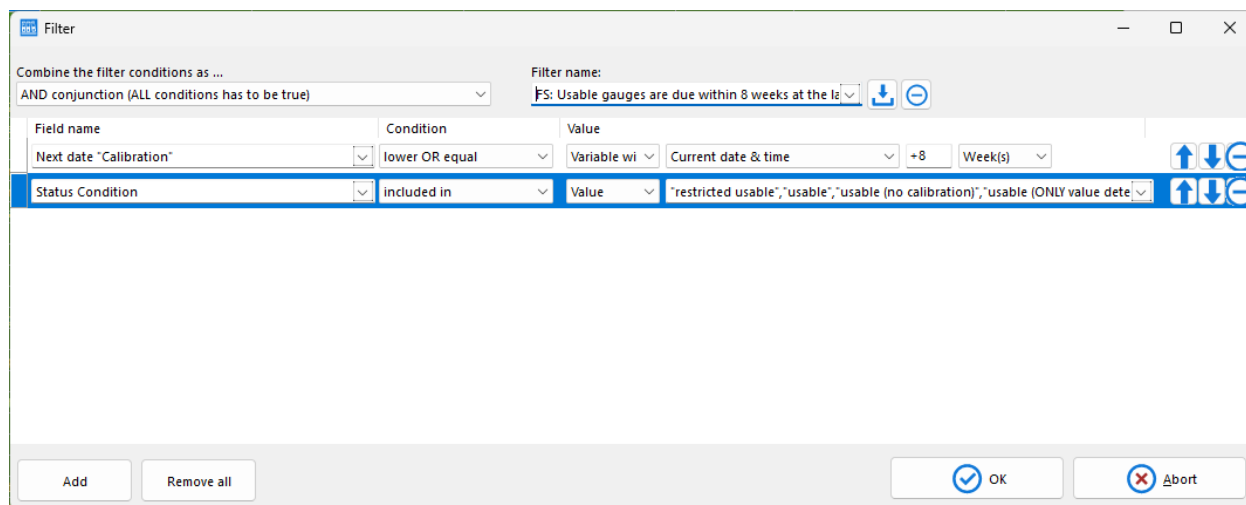Fig. 2.3.4: Definition of the filter (Schema).

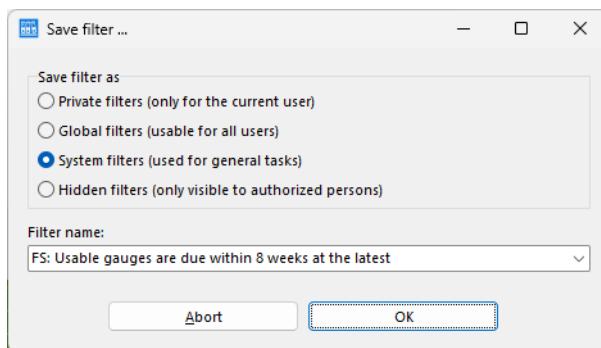Fig. 2.3.5: Definition of the filter (Sample).

Fig. 2.3.6: Save the filter as a system filter (Sample).

2.3.3 Define action

From the example:

The selected gauges should be given a new status of "marked for calibration". A change to the test date (last, next test) should not be made. Changes to other test fields are not desired.
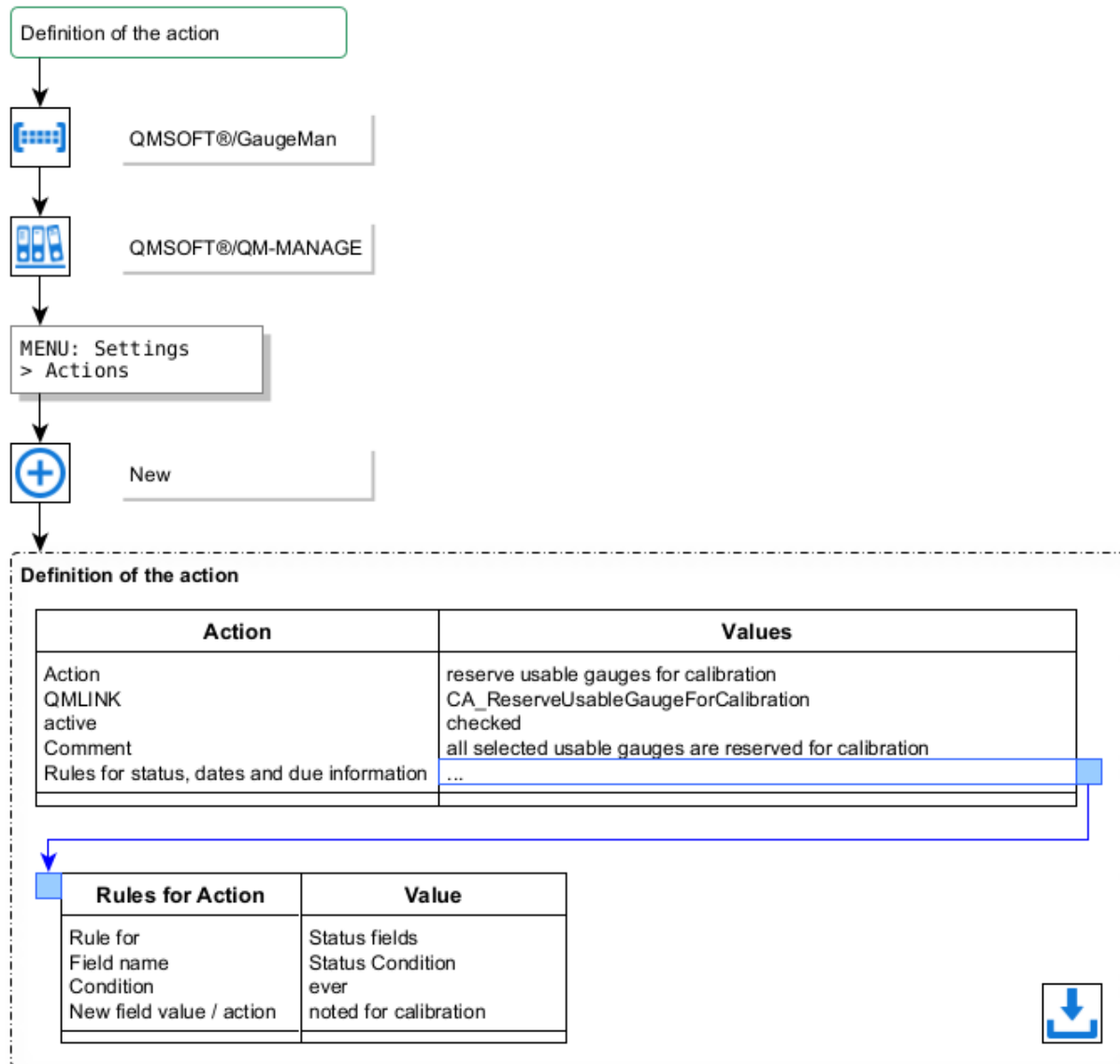
Realization …

Definition of the action

QMSOFT®/GaugeMan

QMSOFT®/QM-MANAGE

MENU: Settings
> Actions

New

Definition of the action

Action	Values
Action	reserve usable gauges for calibration
QMLINK	CA_ReserveUsableGaugeForCalibration
active	checked
Comment	all selected usable gauges are reserved for calibration
Rules for status, dates and due information	...

Rules for Action	Value
Rule for	Status fields
Field name	Status Condition
Condition	ever
New field value / action	noted for calibration

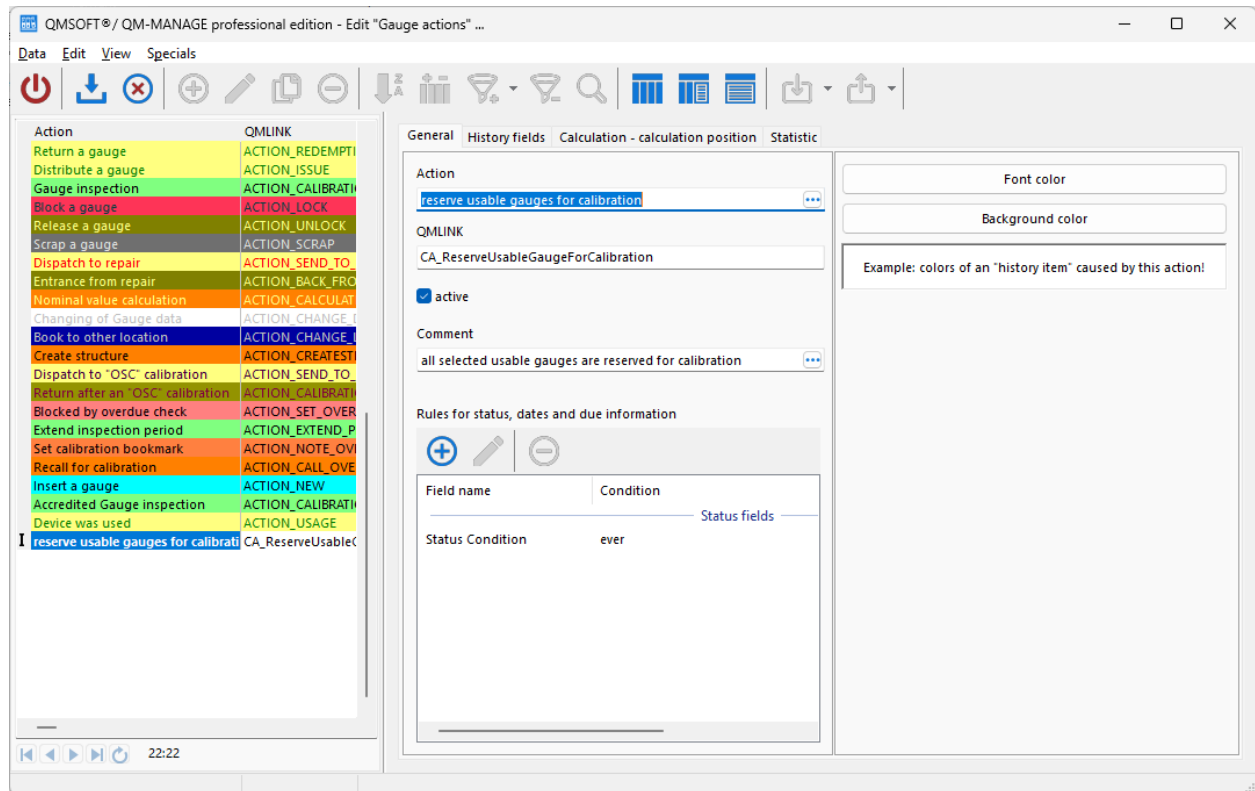Fig. 2.3.7: Definition of the action (Schema).

Fig. 2.3.8: Definition of the action (Sample).

2.3.4 Define due date test

From the example:

A list of the marked gauges should be sent automatically by email.

The sender of the email should be the Head of Quality Assurance (Martin Spät).

The recipients of the gauge list are:

- Head of Quality Assurance (Martin Spät)
- Head of Tool Issue (Cornelia Krause)
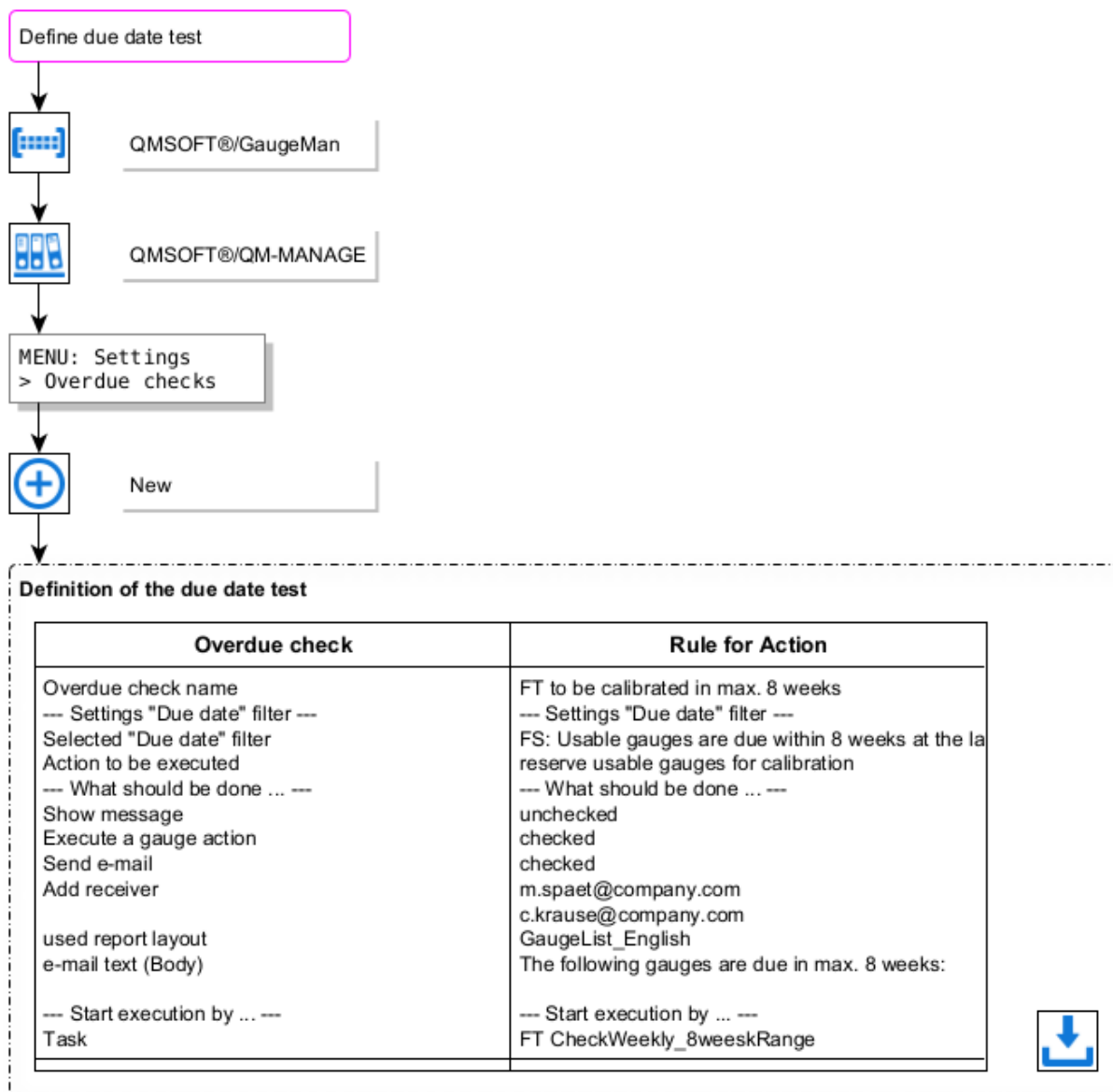
Realization . . .
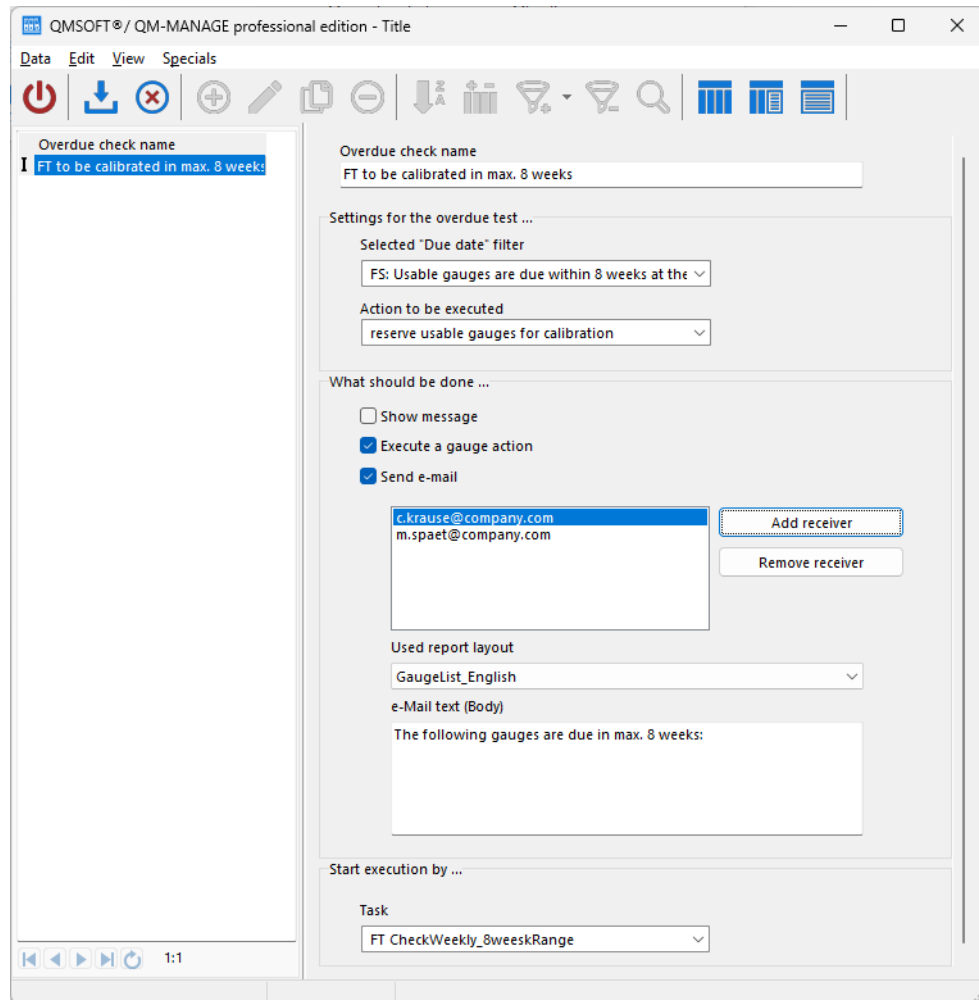
Fig. 2.3.9: Definition of the due date test (Schema).

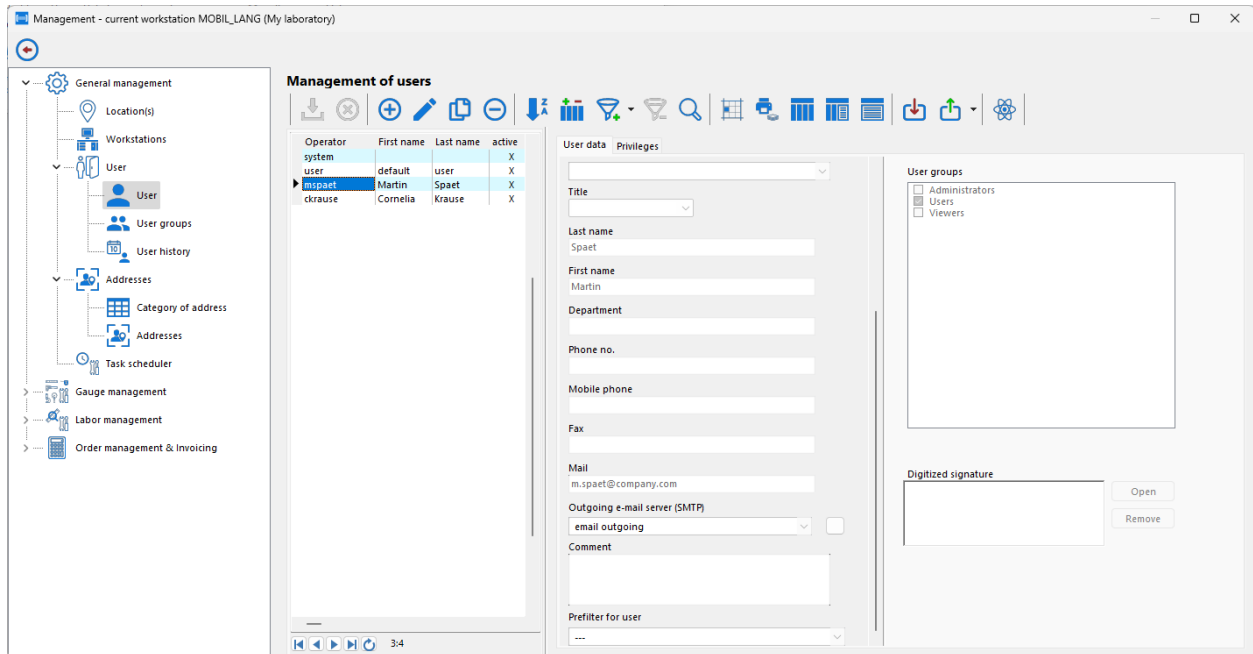Fig. 2.3.10: Definition of the due date test (Sample).

2.3.5 User Settings

Fig. 2.3.11: User Settings - Informationen - Martin Spät (Sample).

Contact

A prepared form for faxing a support request can be found under the menu item *Help → Support sheet* in the QM-SOFT®/GaugeMan program. Please use the following contact information:

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Germany
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E-Mail: support@lw-gmbh.com
Website: www.lw-gmbh.com

Please also remember to provide your own contact details so that we can reach you quickly, and understand that in exceptional cases we cannot respond immediately and directly to every request; we always endeavour to keep our response times as short as possible.