OPN_SLM SERVICE LEVEL MONITORING SYSTEM

GETTING STARTED GUIDE

(SINGLE USER EDITION. COMPACT SQL DATABASE)

Electronic Reading Systems Ltd
14 Wolseley Business Park
Kempston
Beds
MK42 7PW

Tel: 01234 855300
Fax: 01234 855446
www.ers-online.co.uk

61211/100

CONTENTS

1.0 INTRODUCTION

OPN_SLM is a service level monitoring system which uses barcodes to monitor:

- Attendance at individual Sites/ Locations
- Time spent at individual Sites/ Locations
- Overall time taken visiting multiple Sites/ Locations (with confirmation of attendance and/or time spent at the associated individual Sites/ Locations)

The system is based on the OPN2001 barcode data collector. These compact units will be used to scan barcoded location codes as the service being monitored is performed. The scanned location codes will be date/ time tagged by the data collector and stored in internal memory for subsequent downloading into the system database.

A utility is also available for remote field staff to allow the OPN2001 data collectors to be downloaded to a simple data file which can be forwarded to head office for importing into the OPN_SLM data-base.

OPN_SLM incorporates a range of standard reports providing detailed feedback of the service levels achieved.

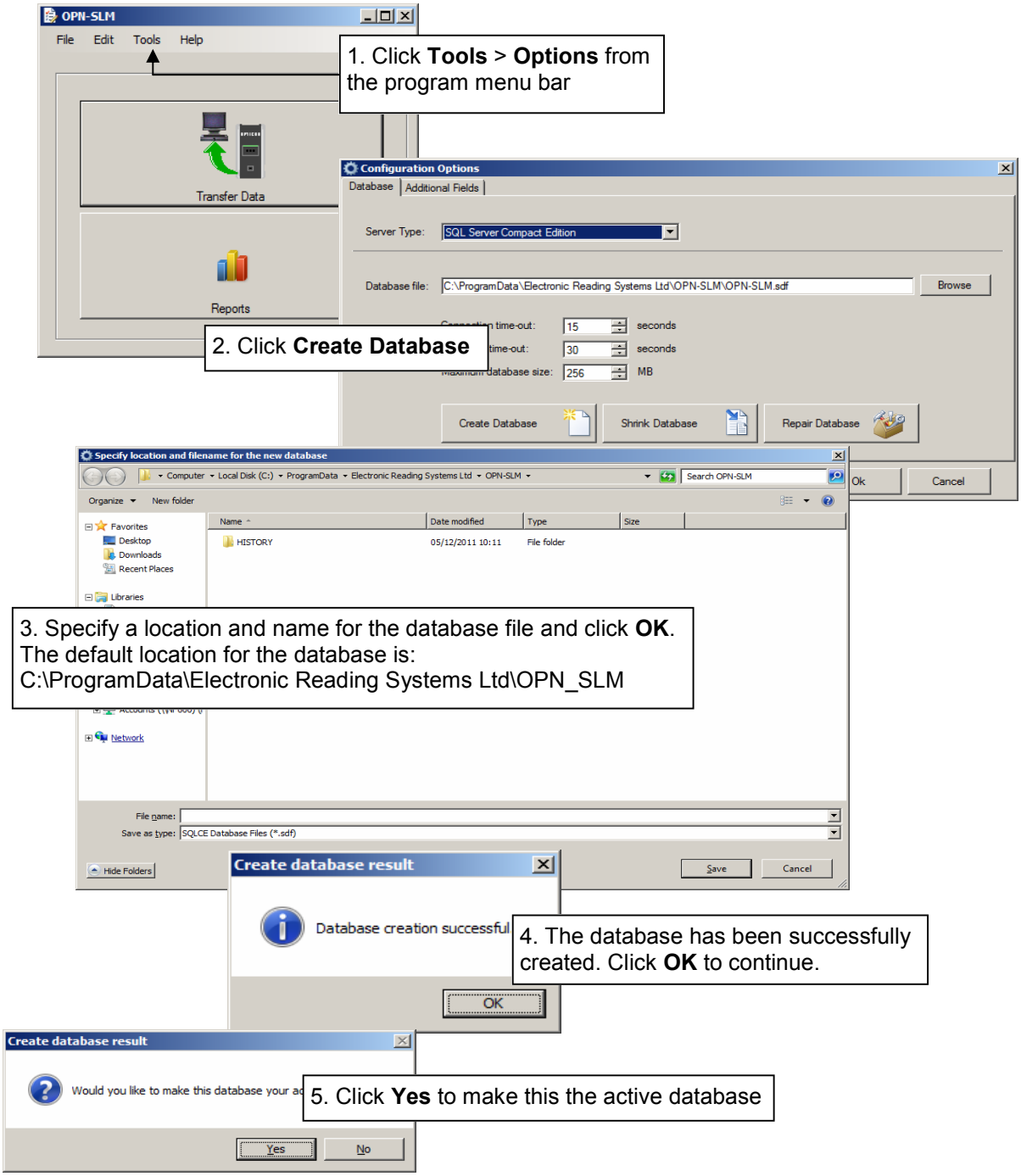
1.0 INSTALLATION

1.1 INSTALLING THE SOFTWARE

To install OPN_SLM Service Monitoring software:

1) Run the installer **setup.exe** from the system CD and follow the prompts
2) Run **CRRedist2005_x86.exe** to install the components use by the reporting module.

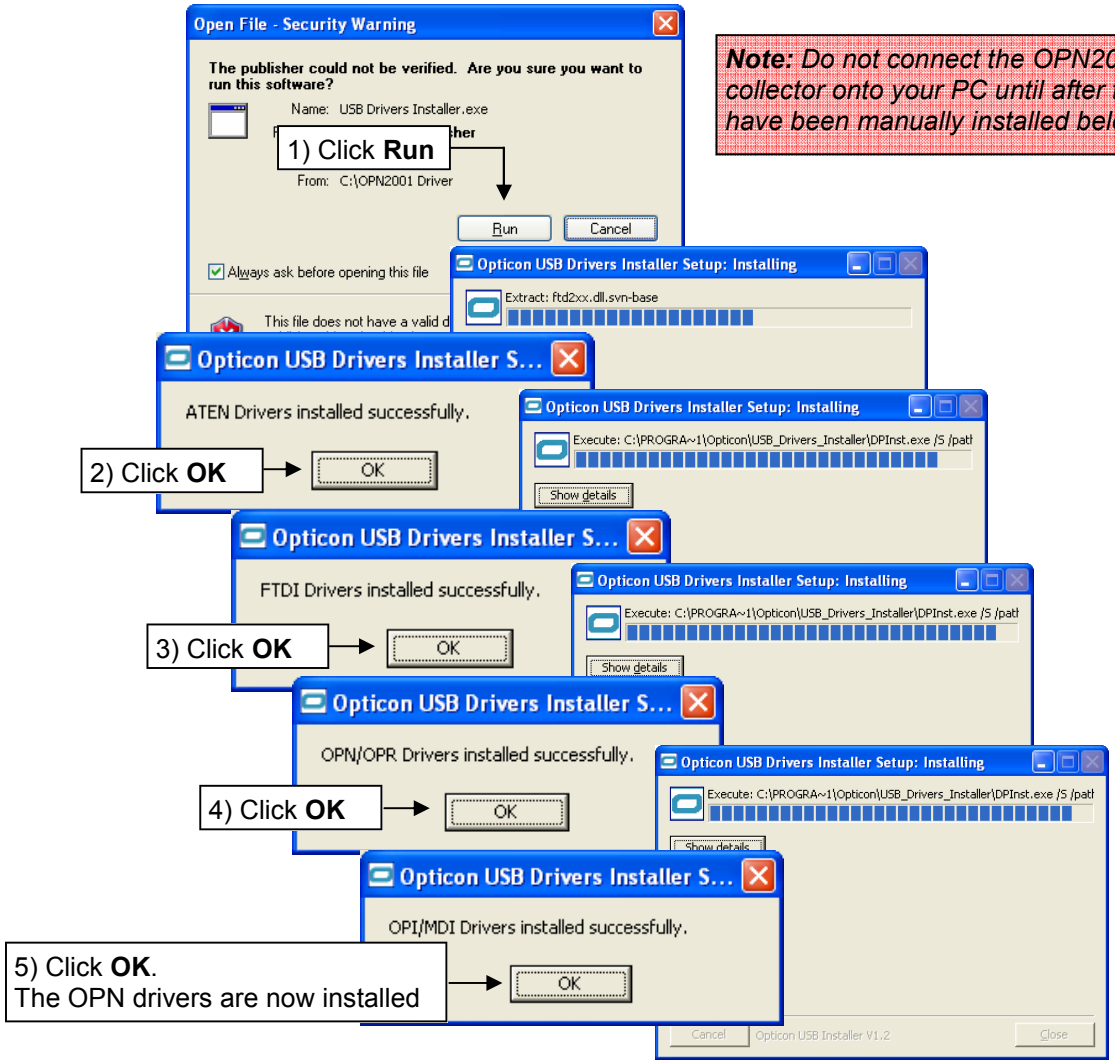
Once installed create the system database as shown below:



NOTE: The software will by default run in Demonstration mode. In this mode the max. number of records in the database will be limited.
To licence the software for full operation see section 9.0 below

1.2 INSTALLING THE OPN2001 DRIVERS

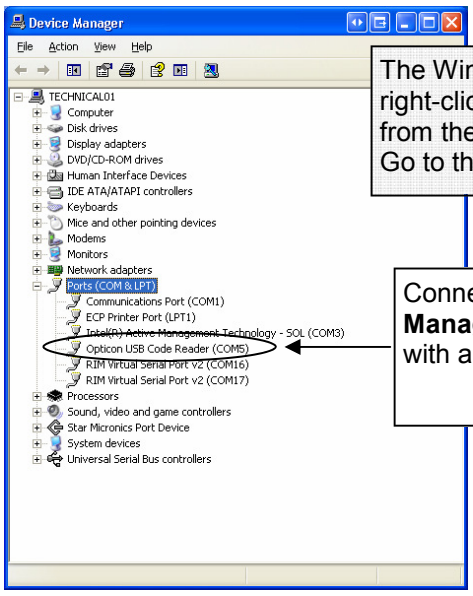
These drivers are used by OPN_SLM when downloading the OPN2001 data collectors.
To install the drivers run the Opticon Driver Installer (**USB Drivers Installer.exe)** from the system CD and proceed as shown below.



***Note:** Do not connect the OPN2001 data collector onto your PC until after the drivers have been manually installed below*

1.2.1 CHECKING THE DRIVER INSTALLATION

The driver installations can be checked via the Windows Hardware Device Manager as follows:



The Windows Device Manager may be accessed by right-clicking **My Computer** then selecting **Properties** from the drop down menu.
Go to the **Hardware Tab** and click **Device Manager**

Connect the scanner to the PC and from the **Windows Device Manager** expand the **Ports** section. The scanner will be listed with a description similar to:
Opticon USB Code Reader (COMxx)

2.0 CONFIGURING OPN_SLM

OPN_SLM allows a database of operators and a database of Locations to be configured.

2.1 CONFIGURING THE OPERATORS

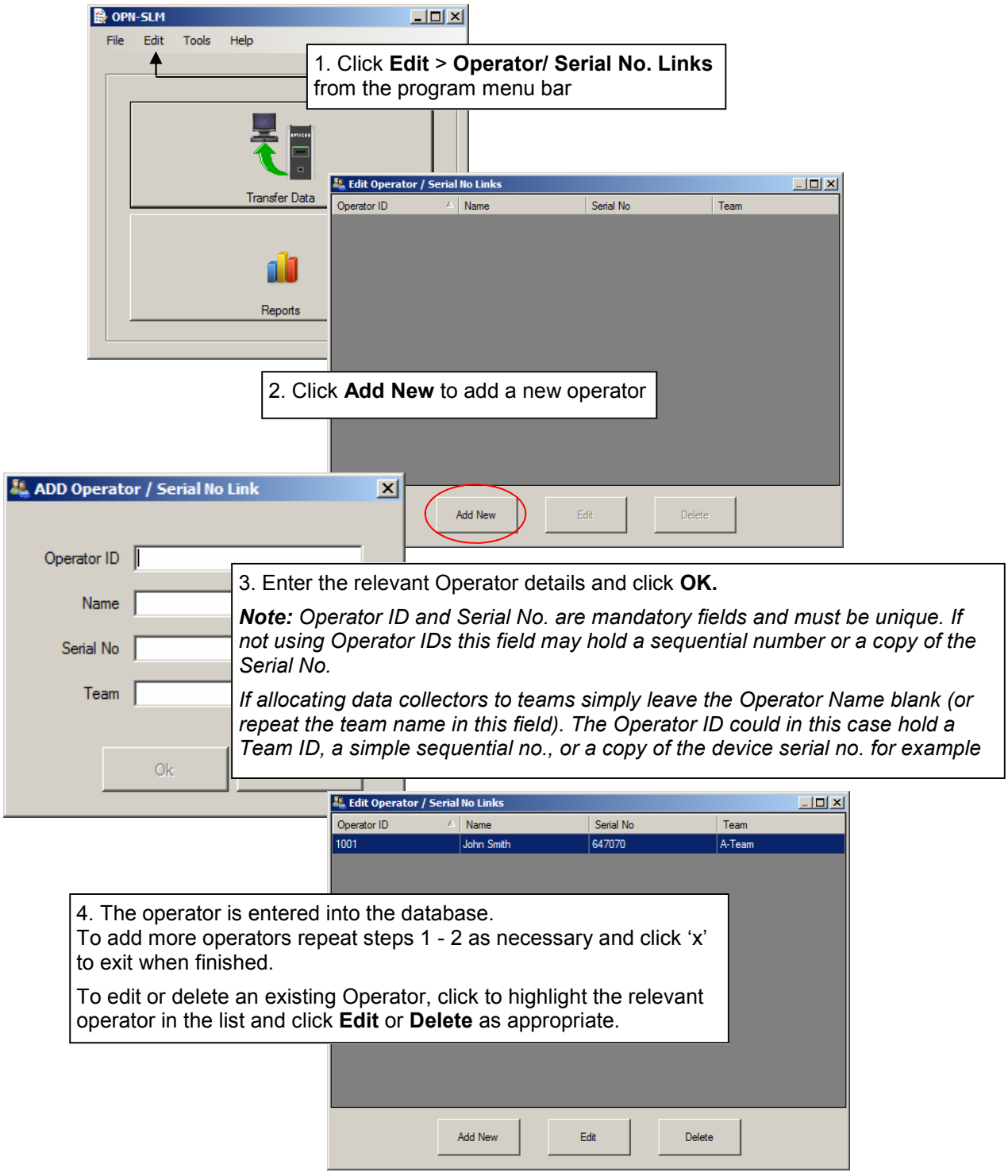
Individual OPN2001 data collectors may be allocated to operators or teams of operators allowing both monitoring of the service level and logging of the specific operator or team providing the service.

Allocating data collectors to operators is not mandatory. If the operators are not included in the operator database the Service Level will still be monitored, however the transactions will be anonymous.

The operator database may be initialised manually via the PC keyboard (See section 2.1.1 below) or by import from a suitable data file (See Section 2.1.1 below).

2.1.1 MANUALLY CONFIGURING THE OPERATORS

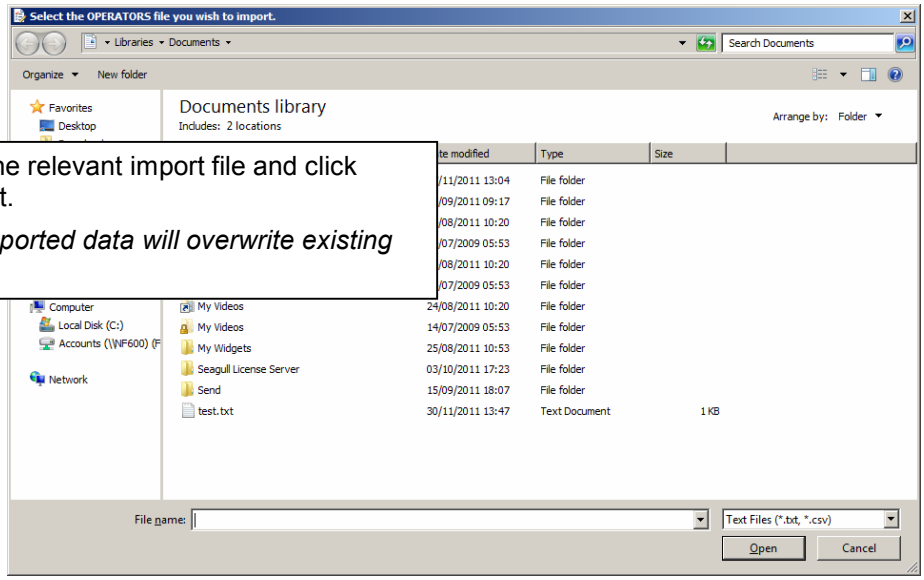
To configure operators proceed as follows:



2.1.2 IMPORTING THE OPERATORS

The operator database may also be initialised by importing the operator details from a simple text file.

To import operator details click **File** > **Import** > **Operator/ Serial No. Link File from the program menu bar** and pro-



1. Browse to the relevant import file and click **Open** to import.

NOTE: *The imported data will overwrite existing operator data*

The import file must be a simple comma delimited data file containing data records in the following format:

Operator ID, Operator Name, OPN2001 Serial No, Team Name

Example import file format:

LLY122,Lilley Yates,899034,TEAM-2
PO393877,Peter Offley,467842,TEAM-5
RETR54362T,RUPERT RANDOLF,736482,
NBB323,Norman Bates,343242,TEAM-10
OPIUY,,341231,
VBJGHIO,Vinney Jones,383278,
JD004,,367812,TEAM-JD

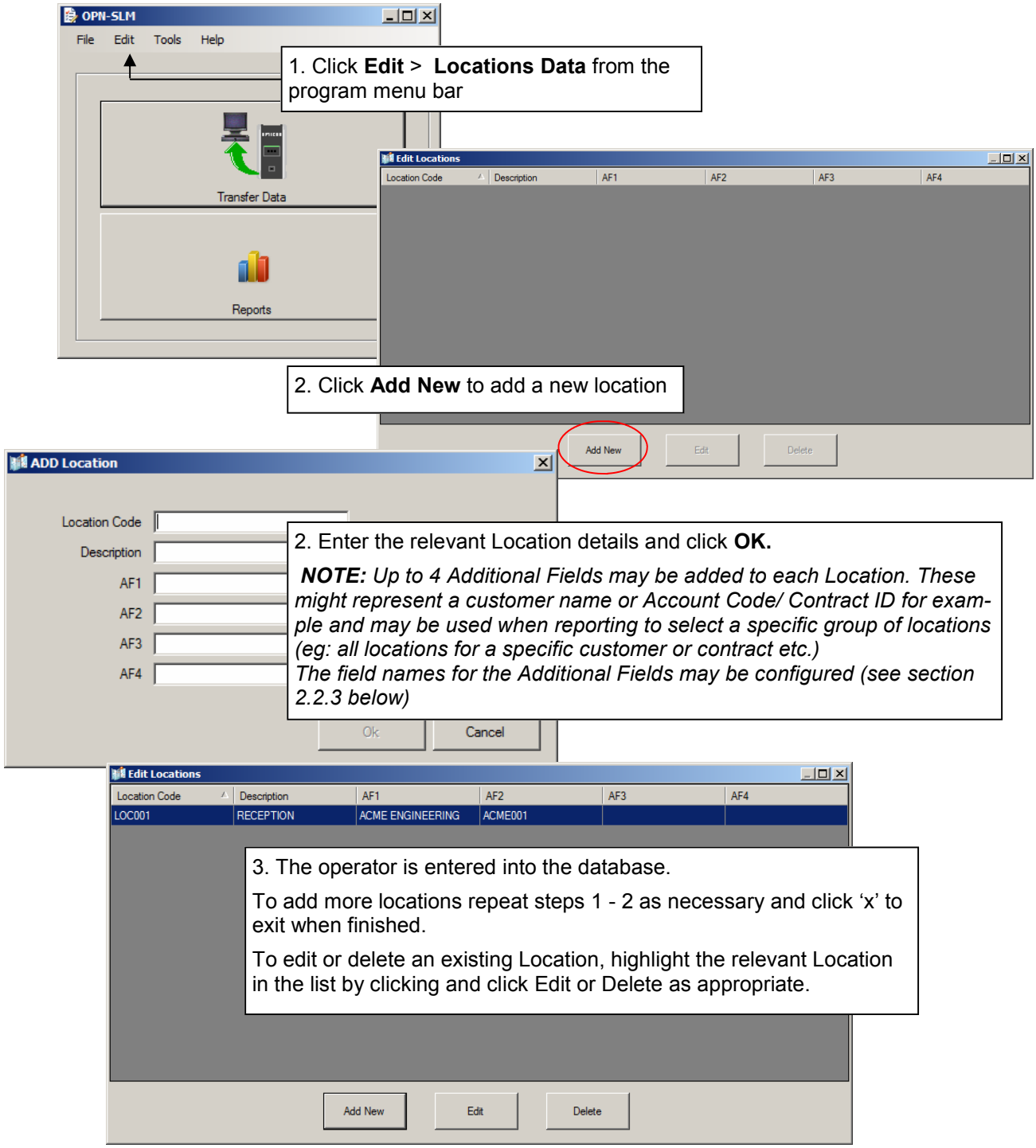
2.2 CONFIGURING THE LOCATIONS

The Locations database includes those locations at which the service level will be monitored.
A suitable barcoded Location Code label will be fixed at these locations and scanned by operators when performing service activities at that location. (See Section 3.0 below **LOCATION BARCODES**)

The Locations database may be initialised manually via the PC keyboard (See section 2.2.1 below) or by import from a suitable data file (See Section 2.2.2 below).

2.2.1 MANUALLY CONFIGURING THE LOCATIONS

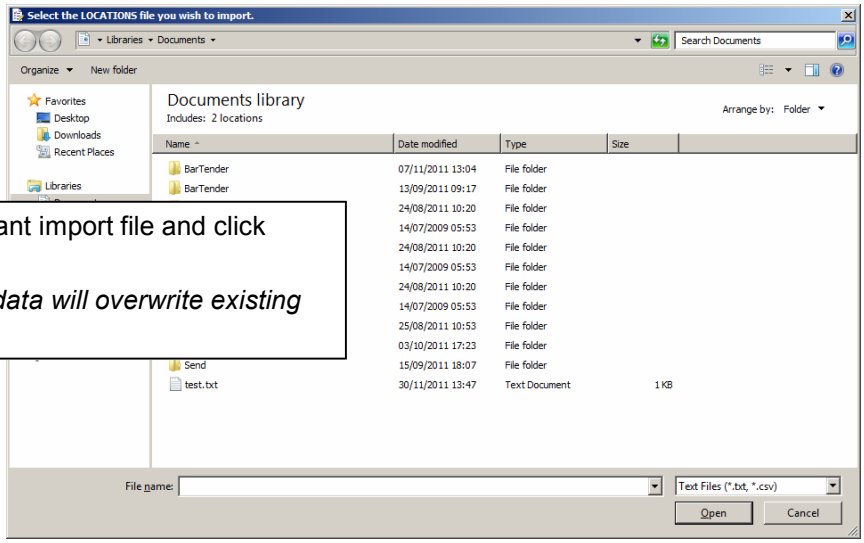
To configure the locations proceed as follows:



2.2.2 IMPORTING THE LOCATIONS

The Location database may also be initialised by importing the Location details from a simple text file.

To import operator details click **File** > **Import** > **Locations Data File** and proceed as follows:



1. Browse to the relevant import file and click **Open** to import.

NOTE: *The imported data will overwrite existing Locations data*

The import file should be a simple comma delimited data file with data records in the following format:

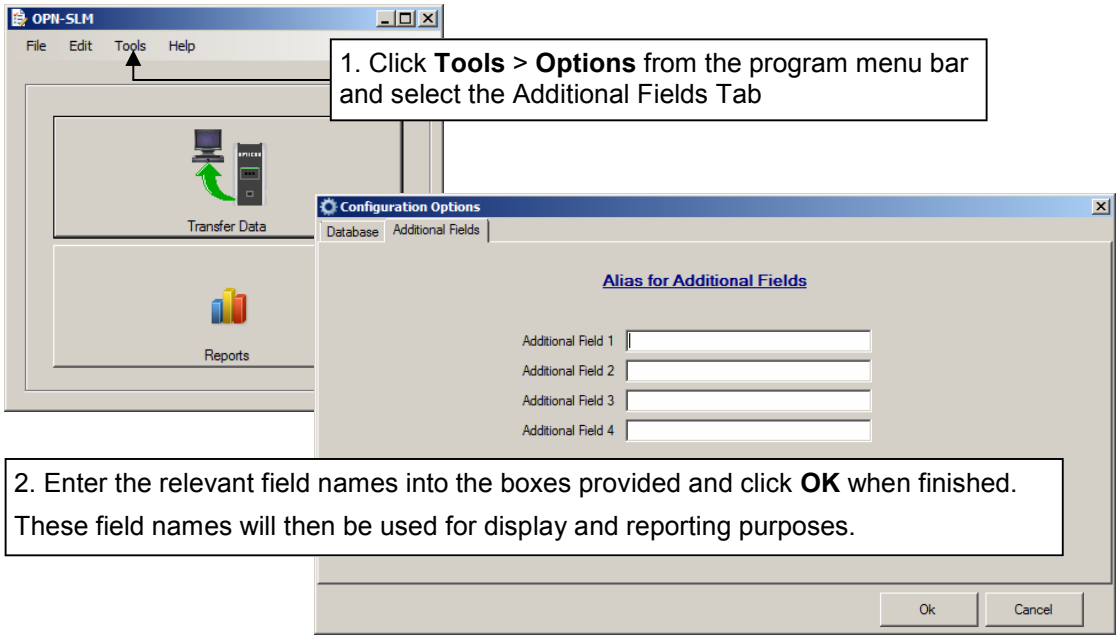
Location Code, Location Name, Addtnl. Field 1, Addtnl. Field 2, Addtnl. Field 3, Addtnl. Field 4

Example import file format:

LOC001,Drawing Room,AF1-Test1,AF2-Test1,AF3-Test1,AF4-Test1
LOC002,Dining Room,,,AF3-Test2,
LOC003,Kitchen,,,,
LOC004,Reception,AF1-Test4,,,AF4-Test4

2.2.3 CONFIGURING THE ADDITONAL FIELD NAMES FOR LOCATIONS

To configure the additional field names click **Tools** > **Options** from the program menu bar and select the Additional Fields Tab:



1. Click **Tools** > **Options** from the program menu bar and select the Additional Fields Tab

2. Enter the relevant field names into the boxes provided and click **OK** when finished.

These field names will then be used for display and reporting purposes.

3.0 LOCATION BARCODES

In use the OPN2001 will be used to scan barcoded Location Codes to confirm attendance at those locations by the operator and if required to log the time spent at the location, or the overall time spent visiting numerous locations.

OPN_SLM supports 3 scanning modes which are automatically handled by the system depending on the format of the scanned Location Barcode. These modes allow:

- Attendance Monitoring
- Time Duration Monitoring per Location
- Time Duration Monitoring across Multiple Locations

The scanning modes above can be freely 'mixed' as necessary to provide the required level of monitoring.

3.1 DATA FORMATS FOR LOCATION CODES

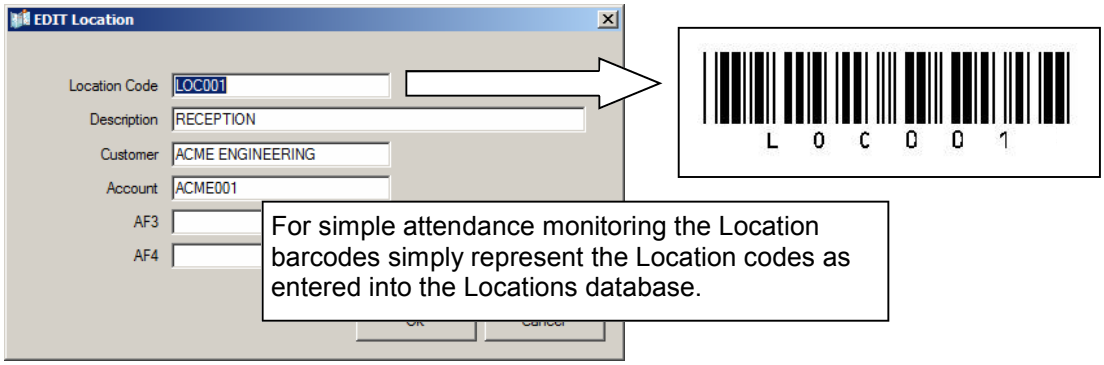
To automatically distinguish between the 3 scanning modes OPN_SLM defines specific data formats for the barcoded Location Codes as summarised below. (For illustrative purposes below we have used an example Location Code 'LOC001')

If using the barcode printing facility in OPN_SLM these formats will automatically be handled by the software as required (see Section 4.0 below). These formats should however be considered if using other software packages to generate the Location barcodes.

3.1.1 ATTENDANCE MONITORING

In this case the operator simply scans a barcoded Location Code on arrival at the location to confirm attendance at that location.

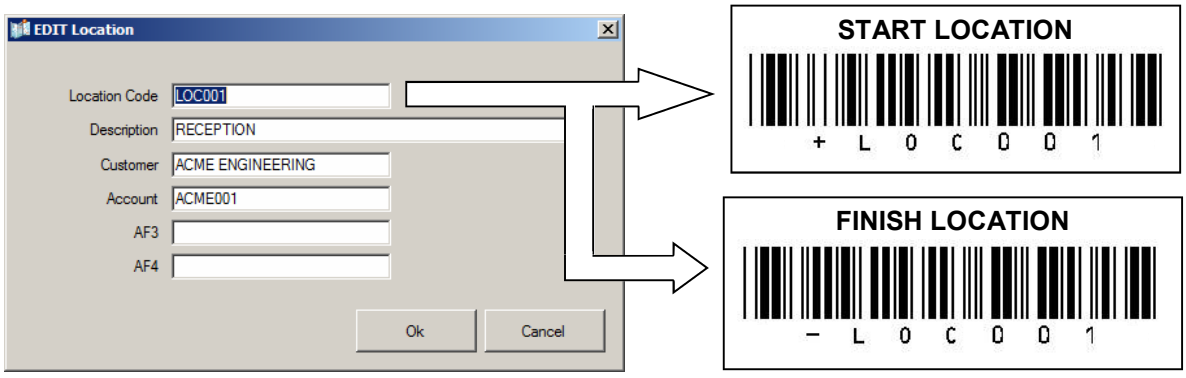
The Location barcode used will be the unmodified Location Code from the Locations Database:



3.1.2 TIME DURATION MONITORING PER LOCATION

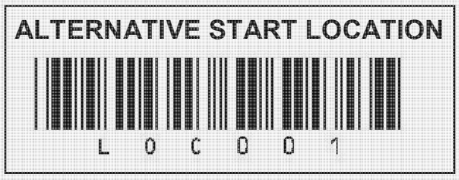
In this case the operator scans a 'Start Location' barcode on arrival at the location and a separate 'Finish Location' barcode on departure allowing the operator's attendance and the duration of the visit to be monitored.

The barcodes used for this scanning mode use the Location Code from the Locations database with a leading '+' or '-' character to distinguish the START and finish barcodes:



Alternative Formats:
The unmodified Location Code (as used for simple Attendance Scanning) can also be used as the Start Location barcode.

An alternative fixed format is also available for the Finish Location barcode simply comprising the word 'FINISH'. The alternative 'FINISH' format allows the option for only the Start Location barcodes to be fixed at the various locations, but for the Finish Location barcode to be scanned from a supervisor menu card, for example.



3.1.3 TIME DURATION MONITORING OVER MULTIPLE/ GROUPED LOCATIONS

This facility provides a measure of the time spent on an overall job or task which comprises of multiple locations. In this case the operator will scan a 'Group Start' barcode at the commencement of the task and a 'Group Finish' barcode when the task is completed.

Between the Group Start and Group Finish barcodes the operator will in general proceed to scan location barcodes as detailed in 3.1.1 and 3.1.2 above to log attendance at, or measure time spent at each individual location within the overall task.

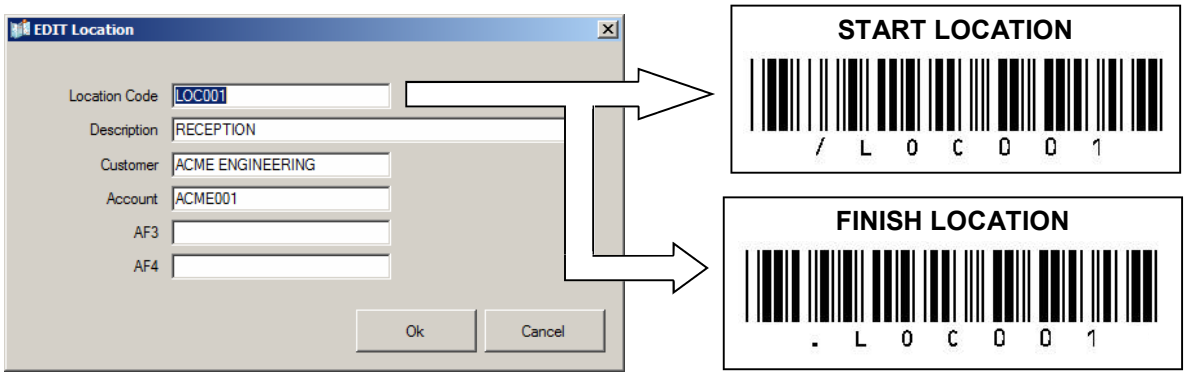
To use this facility it is necessary to define a 'Location' which represents the start and finish point for the overall task. This does not have to be a 'physical' location, it is merely used to provide the required Group Start and Finish codes.

The Group Start and Group Finish barcode formats are defined as follows:

Group Start Barcode: - This will be the Location Code from the OPN_SLM database preceded by a '/' (forward slash) character

Group Finish Barcode:- This will be the Location Code from the OPN_SLM database preceded by a '.' (full stop) character

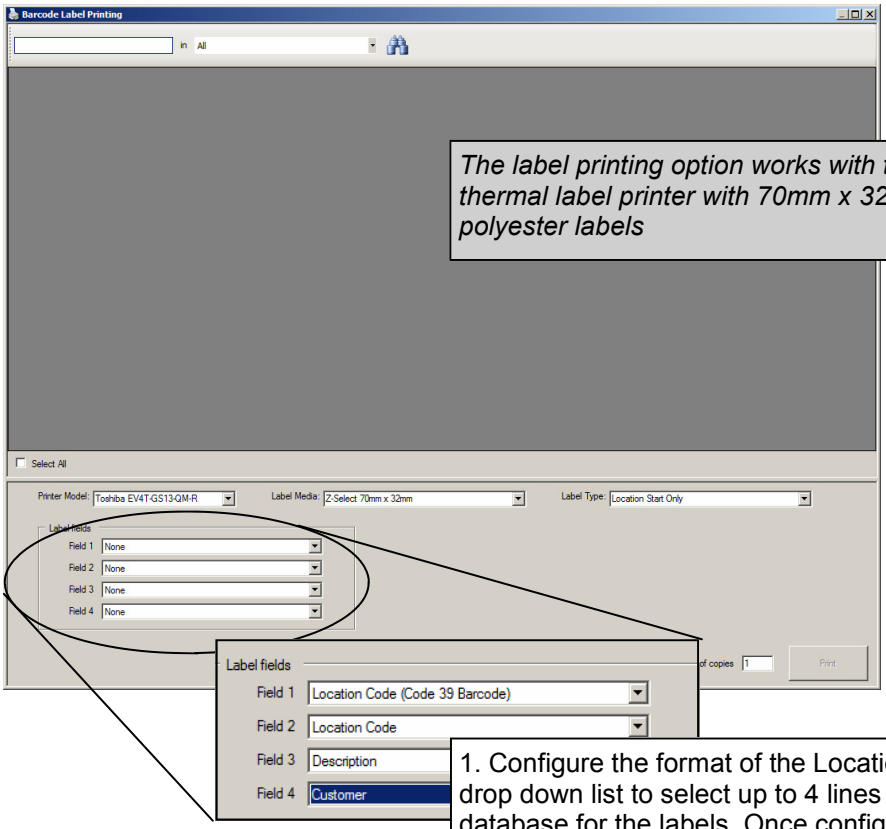
Note: *In the case of Group Start and Finish there are no alternative Start and Finish codes as defined for Location Start and Finish*



4.0 BARCODE PRINTING

OPN_SLM includes a facility to print location barcodes using the Toshiba B-EV4T desktop label printer. This option may be used to generate 70mm x 32mm self adhesive paper or polyester labels including (where necessary) the relevant formatting characters as summarised in section 3.0 above.

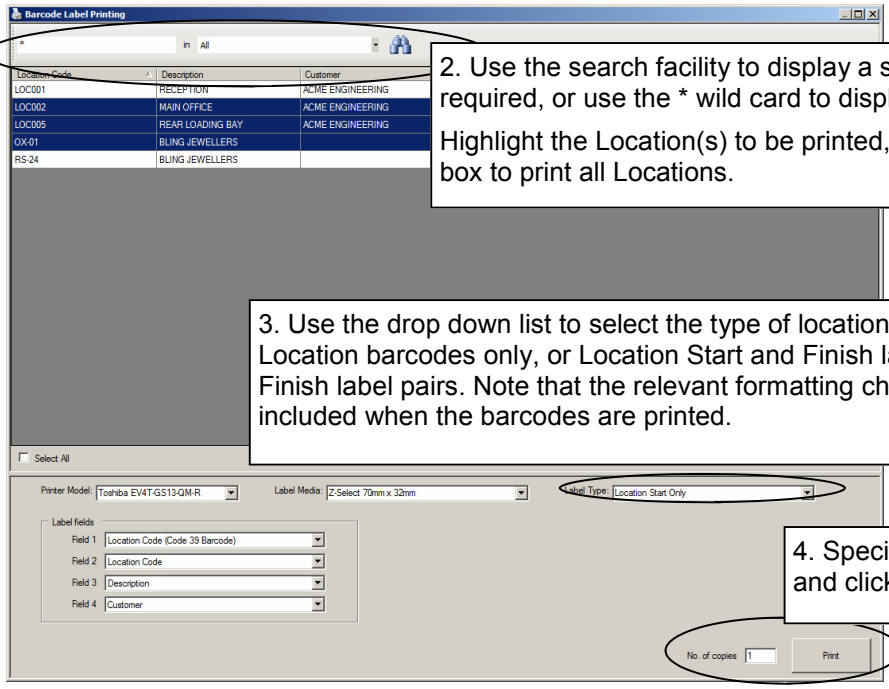
To print barcoded location labels click **Tools** > **Barcode** printing and proceed as shown below:



The label printing option works with the B-EV4T thermal label printer with 70mm x 32mm paper or polyester labels

1. Configure the format of the Location Labels. Use the relevant drop down list to select up to 4 lines of data from the Locations database for the labels. Once configured this format will remain as default until subsequently changed.

In this example the labels will include the Location code (as barcode), the location code (as text) plus the Location Description and customer name (as text).



2. Use the search facility to display a specific Location code as required, or use the * wild card to display all Locations.

Highlight the Location(s) to be printed, or click the **Select All** box to print all Locations.

3. Use the drop down list to select the type of location barcodes required. ie: simple Location barcodes only, or Location Start and Finish label pairs, or Group Start and Finish label pairs. Note that the relevant formatting characters will automatically be included when the barcodes are printed.

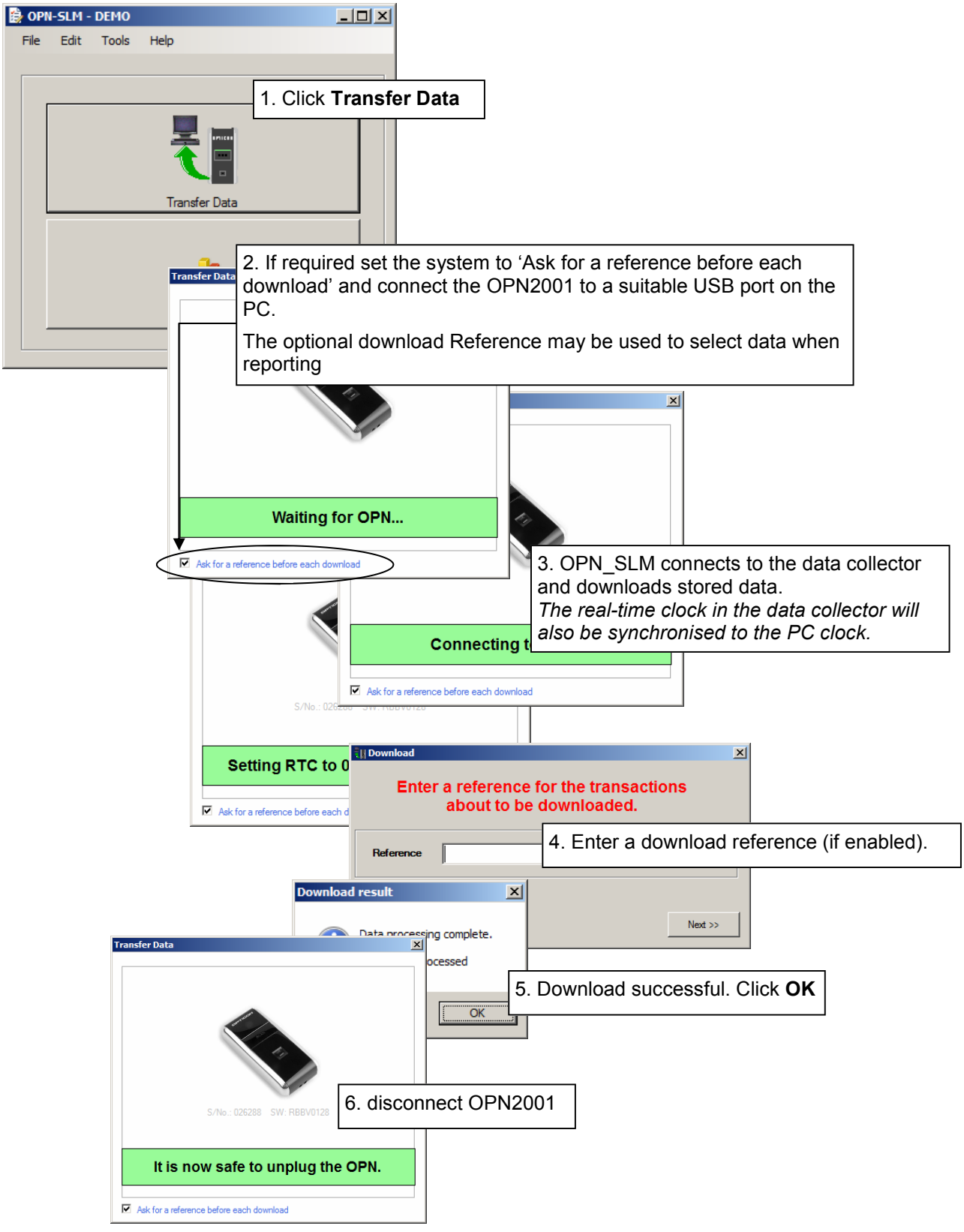
4. Specify the no. of copies required and click **Print** to generate the labels

5.0 DOWNLOADING THE OPN2001 DATA COLLECTOR

In use the OPN2001 data collector will be used to monitor service levels by scanning location barcodes.

To download the stored barcode data from the data collector proceed as shown below.

Note: *The Transfer Data facility will automatically synchronise the OPN2001 real-time clock. Before using the data collectors we therefore recommend using the Transfer Data function to ensure the all the devices are synchronised and set to the correct time*



6.0 EDITING THE DOWNLOADED TRANSACTIONS

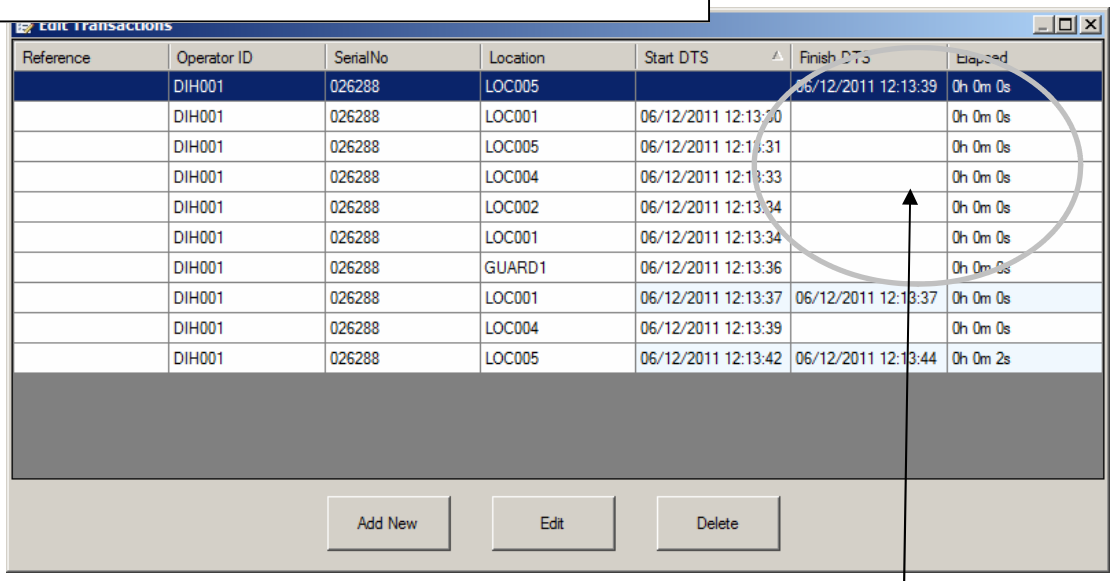
The downloaded data may be manually edited if required. Existing transactions may be edited or deleted and new transactions manually entered as required.

To edit the transactions click **Edit** > **Transactions** from the program menu and proceed as follows:

Highlight a single transaction and click **Edit** to amend, or highlight one or more records and click **Delete** to remove those records from the database.

Alternatively click **Add New** to manually enter a new transaction.

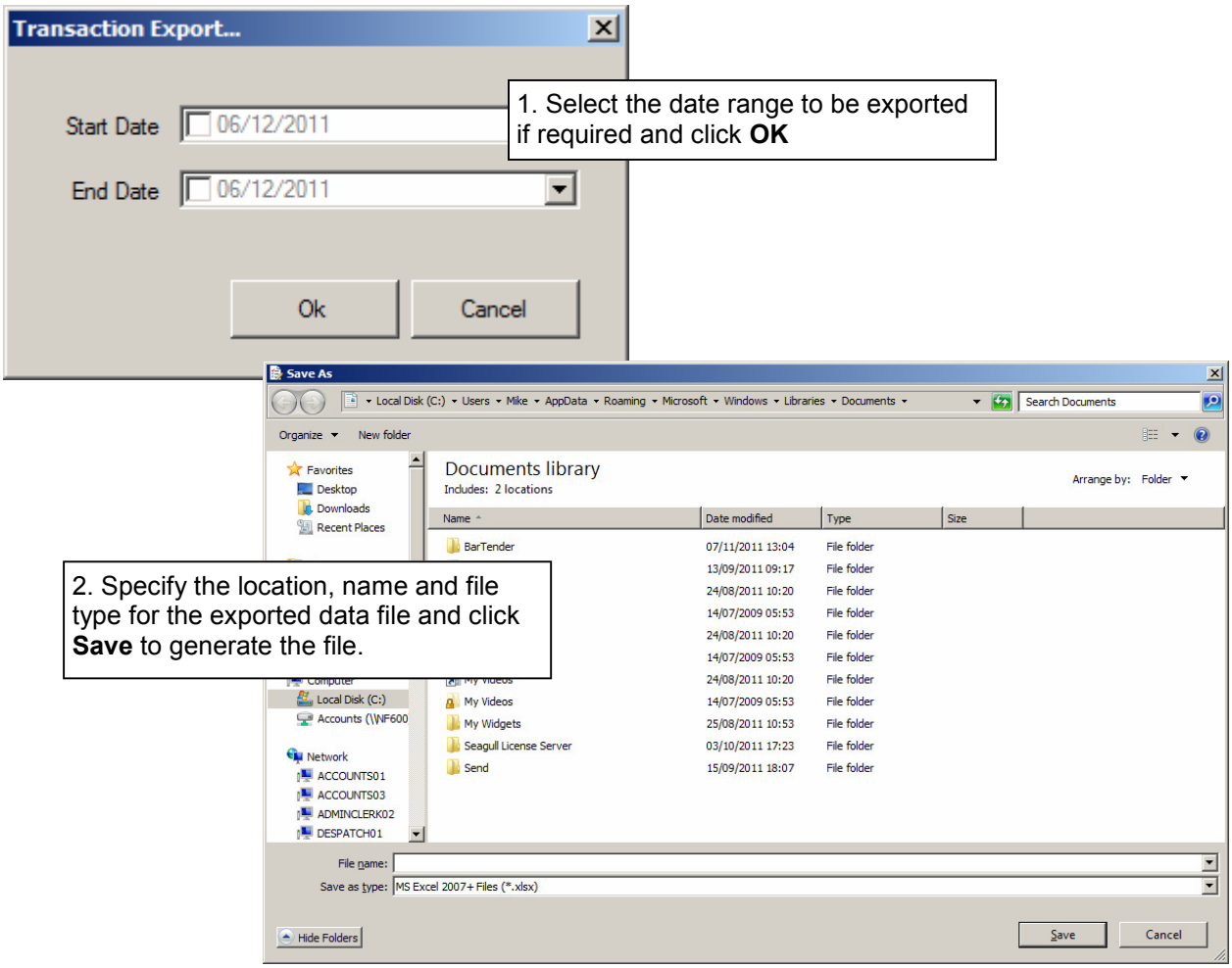
Note: *To order the Edit Transactions grid by any specific data field click on the relevant field header.*



Transactions from simple ‘attendance’ scanning

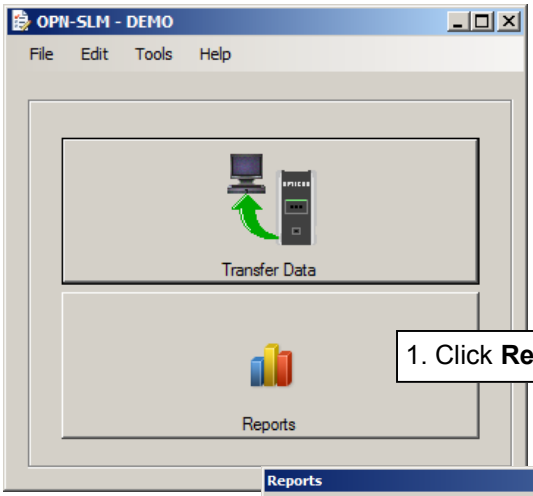
7.0 EXPORTING THE TRANSACTIONS

The stored transactions may be exported from the OPN_SLM in text or Excel format.
To edit the transactions click **File** > **Export** > **Transactions** from the program menu and proceed as follows:

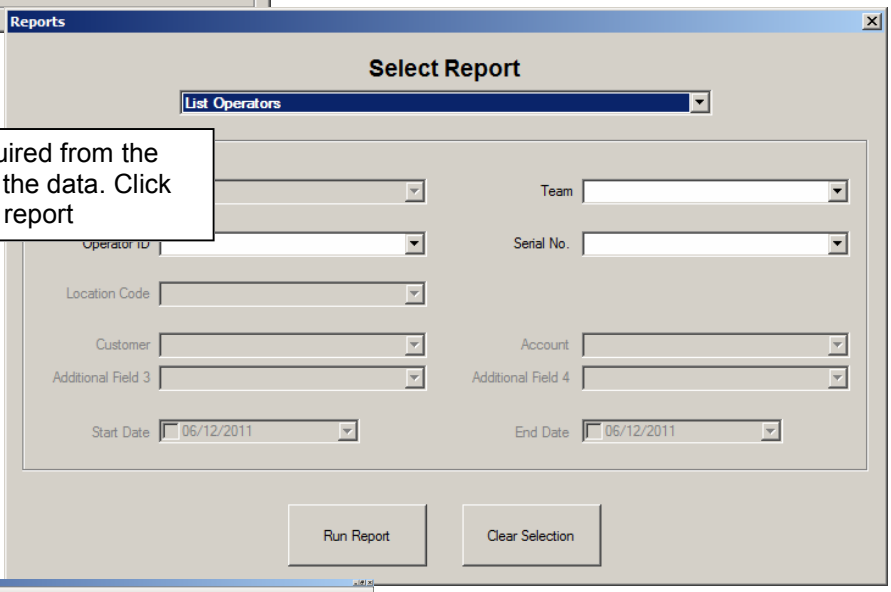


8.0 REPORTING

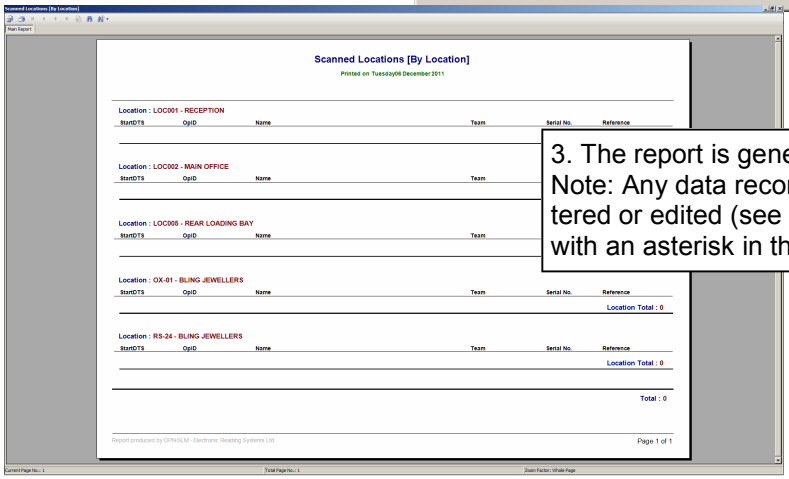
A selection of standard reports are incorporated into the system. To run reports proceed as follows:



1. Click **Reports**



2. Select the report type required from the list, and selection criteria for the data. Click **Run Report** to generate the report



3. The report is generated.
Note: Any data records which have been manually entered or edited (see section 7.0 below) will be highlighted with an asterisk in the left hand column.

9.0 LICENCING THE SOFTWARE

After initial installation the software will run in demonstration/evaluation mode where the max. number of records in the database will be limited.

To licence the software for normal use click **Help** > **Licence Management** and proceed as follows: