

OPN_SLM SERVICE LEVEL MONITORING SYSTEM GETTING STARTED GUIDE (SINGLE USER EDITION. COMPACT SQL DATABASE)

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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 database.

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:

🚯 ор	N-SLM			
File	Edit Tools Help		1. Click Tools > Options from the program menu bar	
		t.	Configuration Options	<u><</u>
	Т	ransfer Data	•	1
			Server Type: SQL Server Compact Edition	
	<u></u>	2. Click Crea	ate Database time-out: 15 seconds time-out: 30 seconds	
	# Construction and Ale	nono fou the nour database	Create Database Think Database	
	Computer	name for the new database	a - Electronic Reading Systems Ltd - ORN-SLM 22 Search ORN-SLM 20 Ok Cancel	
	Organize 👻 New folder		8≣ ▼ 0	
	Avorites Sector Desktop Downloads Recent Places	Name ^	Date modified Type Size 05/12/2011 10:11 File folder	
3. Spe The d C:\Pro	ecify a locatio efault locatio ogramData\E	on and name t n for the data lectronic Rea	for the database file and click OK . Ibase is: ding Systems Ltd\OPN_SLM	
	E M Network			
	File name:	E Database Eiles /* cdf)	<u>।</u>	
	Hide Folders	Create datab	ase result Save Cancel	
		🚺 Dat	tabase creation successful 4. The database has been successfully created. Click OK to continue.	
Freate data	abace recult			
-reate tala	ibuse result			
(?) v	Vould you like to make th	is database your at 5.	Click Yes to make this the active database	
		Yes		

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.



1.2.1 CHECKING THE DRIVER INSTALLATION

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



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:

	😫 OPI	N-SLM					_ 🗆 ×						
	File	Edit	Tools	Help	_						_		
		•			1	. Click E	dit > 0	perato	or/ Seria	al No. Links	5		
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84						-	1						
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							(Ad	id New	Edit	Delete	:		
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				Ser	ial No	•							
1	Team			lf al	locatii	na data i	collecto	ors to te	ams si	mply leave t	he Opera	tor Na	me blank (or
		·		ron	aat th	a taam n	ame in	this fie	ald) Th	e Operator I	D could i	n this c	ase hold a
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						1001	J	lohn Smith	64	47070	A-Team		
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t		twhe	n finis	hed			• • –						
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lo	pera	tor in	the li	st an	d clicl	k Edit or	Delete	as ap	propriat	te.			
	•					-							
							A	o new	Edit	Delet			

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-

I	😫 Select the OPERATORS file	you wish to import.					×	
	Libraries - Documents -					 Search Documents 		
	Organize 🔻 New folder					833	• 🔳 🔞	
	Favorites	Documents library Indudes: 2 locations				Arrange by:	Folder 🔻	
1 Browso to the	rolovant imr	ort file and click	te modified	Туре	Size			
Open to import.	/11/2011 13:04 /09/2011 09:17	File folder File folder						
NOTE: The impoperator data	/08/2011 10:20 /07/2009 05:53 /08/2011 10:20	File folder File folder File folder						
	Computer	Mu Videos	/07/2009 05:53	File folder				
	Local Disk (C:)	A My Videos	14/07/2009 05:53 25/08/2011 10:53	File folder File folder				
	🗣 Network	Seagull License Server Send	03/10/2011 17:23 15/09/2011 18:07	File folder File folder				
		est.txt	30/11/2011 13:47	Text Document	1 KB			
	File <u>n</u> a	me:			•	Text Files (*.txt, *.csv)	-	
	-	,				<u>O</u> pen	Cancel	

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:

	🗟 Select the LOCATIONS file you wish to import.							
	Libraries •	- Documents -	- 🚱 Search Documents					
	Organize 👻 New folder	Organize 🔻 New folder						
	★ Favorites ■ Desktop	Documents library Includes: 2 locations				Arrange by: Folder 🔻		
	Downloads	Name *	Date modified	Туре	Size			
	and recent foces	퉬 BarTender	07/11/2011 13:04	File folder				
	📜 Libraries	퉬 BarTender	13/09/2011 09:17	File folder				
			24/08/2011 10:20	File folder				
1. Browse to the releva	ant import file	e and click	14/07/2009 05:53	File folder				
Open to import			24/08/2011 10:20	File folder				
open to import.			14/07/2009 05:53	File folder				
NOTE. The imported	lata will avar	write evicting	24/08/2011 10:20	File folder				
NOTE: The imported of	ala will over	write existing	14/07/2009 05:53	File folder				
Locations data			25/08/2011 10:53	File folder				
			03/10/2011 17:23	File folder				
	<u> </u>	🎳 Send	15/09/2011 18:07	File folder				
		test.txt	30/11/2011 13:47	Text Document	1 KB			
	File <u>n</u>	ame:			•	Text Files (*.txt, *.csv)		
						Open Cancel		

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:

😫 OP	N-SLM								
File	Edit Tools Help	1. Click Tools > Options from the program menu bar and select the Additional Fields Tab							
	Transfer Data	Database Additional Fields							
	Reports	Additional Field 1 Additional Fields Additional Field 2 Additional Field 3 Additional Field 4							
2. Enter the relevant field names into the boxes provided and click OK when finished.									
The	ese field names will the	n be used for display and reporting purposes.							
		Ok Cancel							

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:

🗱 EDIT Location			×			
			N			
Location Code	LOC001			>		
Description	RECEPTION				I INNINI INNI INNI	
Customer	ACME ENGIN	EERING			LOC	001
Account	ACME001					
AF3		For simple	e attendance monitor	ring t	he Location	
AF4		barcodes	simply represent the	Loc	ation codes as	
		entered in	to the Locations data	abas	e.	
			OK Cancer			

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:

EDIT Location	[LOC001]			START LOCATION
Description	RECEPTION			+ L O C D D 1
Customer	ACME ENGINEERING			
Account	ACME001			
AF3				FINISH LOCATION
AF4				
		Ok Cancel		- L O C D D 1

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

₩ EDIT Location			×	
Location Code	LOC001			
Description	RECEPTION			
Customer	ACME ENGINEERING			, 2 0 2 0 1
Account	ACME001			
AF3				FINISH LOCATION
AF4				
		Ok Cancel		

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:



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.

Reference	Operator ID	SerialNo	Location	Start DTS	Finish DTS	Eloped
	DIH001	026288	LOC005		06/12/2011 12:13:39	Oh Om Os
	DIH001	026288	LOC001	06/12/2011 12:13:10		Oh Om Os
	DIH001	026288	LOC005	06/12/2011 12:1/:31		Oh Om Os
	DIH001	026288	LOC004	06/12/2011 12:13:33		Oh Om Os
	DIH001	026288	LOC002	06/12/2011 12:13.34	▲	Oh Om Os
	DIH001	026288	LOC001	06/12/2011 12:13:34		Oh Om Os
	DIH001	026288	GUARD1	06/12/2011 12:13:36		Oh Om Cs
	DIH001	026288	LOC001	06/12/2011 12:13:37	06/12/2011 12:13:37	Oh Om Os
	DIH001	026288	LOC004	06/12/2011 12:13:39		Oh Om Os
	DIH001	026288	LOC005	06/12/2011 12:13:42	06/12/2011 12:13:44	Oh Om 2s
			1	1 1		
		Add New	Edit	Delete		

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:

😫 OPN-SLM - DEMO				
File Edit Tools Help				
Transfe	Data			
		ports		
Repo	nts			
R	eports			×
		Select R	eport	
	List Operators			
2. Select the report type requi	ed from the			
list, and selection criteria for the result of the result	e data. Click	V	Team	
		•	Serial No.	_
	Location Code	v		
	Customer	_	Account	
	Additional Field 3	~	Additional Field 4	_
	Start Date 06/12/2011	Ţ	End Date 66/12/2011	<u>~</u>
		Bun Benot	Clear Selection	
0 M M+				
Scanned Locations [By] Printed on Tursday00 December	.ocation] ²²⁰¹¹			
Location : LOC001 - RECEPTION stantDTS OpID Name	Team Serial No. Reforence			
Location : LOC002 - MAIN OFFICE ManDTS OpID Name	3. The repor	rt is generated. ata records whi	ch have heen mar	ually en-
Location : LOC005 - REAR LOADING BAY	tered or edit	ed (see section	7.0 below) will be	highlighted
_StanDTS OpID Name	with an aste	risk in the left h	and column.	
Location : 0X-01 - BLING JEWELLERS SunDTS Op/0 Name	Team Serial No. Reference Location Total : 0			
Location : R3-24 - DLING JEWELLERS 	Team Serial No. Reference Location Total : 0			
	Total : 0			
Report produced by CPIVSLM - Dedrunic Reading Systems Ltd	Page 1 of 1			

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:

🔁 Lice	nce Manage	ement						×	
OPN-SLM									
							1. Clic	k Change	Licence
	Licence:		DEMO		Char	nge Licence			
	Expiry Date:	N	ever					-	
Licenced Options: Description Single User Read Only				E	Status nabled isabled				
	🎋 Enter Relea	ase Code			X				
	Keycode 557961			2. OPN_SLM generates a random Keycode. Contact ERS for the relevant release code					
	Releas	ecode	Ok	C	ancel				