

# 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:

😫 OP	N-SLM			
File	Edit Tools Help		1. Click <b>Tools</b> > <b>Options</b> from the program menu bar	
		t I	Configuration Options Database Additional Fields	×
	li	ransfer Data		
		1	Server Type: SQL Server Compact Edition	
		Reports	Concerting time out: 15 is seconds	
		2. Click Crea	time-out: 30 = seconds	
Ĩ			Create Database 🎽 Shrink Database 📔 Repair Database 👹	
	Specify location and files		a + Electronic Reading Systems Ltd + OPN-SLM + + 12 Search OPN-SLM 12 Ok Cancel	_
	Organize 🔻 New folder		₩ + 0	
	Avorites     Sector     Desktop     Downloads     Recent Places	Name *	Date modified         Type         Size           05/12/2011 10:11         File folder	
	🗆 🥽 Libraries			
The d	efault locatio	n for the data	for the database file and click <b>OK</b> . abase is: ading Systems Ltd\OPN_SLM	
	E Matwork			
	File name:			
		E Database Files (*.sdf)		
	Hide Folders	Create datab	Dase result Save Cancel	
		Dat	tabase creation successful 4. The database has been successfully created. Click <b>OK</b> to continue.	
			ОК	
Create data	base result			
? •	Vould you like to make thi	is database your ad 5.	Click <b>Yes</b> to make this the active database	
		Yes	No	

**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	_						_		
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							Jogran						
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				- 7									
						_							
				Trans	fer Data	🍇 Edit Opera							
				mane	ior bata	Operator ID		Name	S	erial No	Team		
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				L/K	ports								
				_									
					2. Clic	k Add N	lew to a	add a n	new ope	erator			
84						-	1						
🍇 ADD Oj	perato	or / Se	rial No I	Link		×					1		
							( Ad	id New	Edit	Delete	:		
Operat	tor ID												
				3. E	nter t	he releva	ant Ope	erator d	details a	and click <b>OK</b>			
1	Name			Not		orator II	) and S	Coriol N	la ara r	mandatory fi	aldo and	must h	o uniquo If
										nandatory fi			
Seri	ial No				-	•	or IDS ti	nis neia	i may n	old a seque	ntiai num	ber or a	a copy of the
				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
		·								e Operator I			
													. for example
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		UK.											
						🍇 Edit Opera	tor / Serial N	lo Link <del>s</del>					
						Operator ID	Δ	Name	S	Serial No	Team		
						1001	J	lohn Smith	64	47070	A-Team		
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4	I. The	e ope	rator i	s en	tered	into the	databa	se.					
									essarv	and click 'x'			
			n finis				• • -						
										he relevant			
						k Edit or							
	•					-							
							A	dd 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-

	1						
	Select the OPERATORS file	e you wish to import.					×
	Libraries -	Documents -			🔻 🛃 Se	arch Documents	<u>,</u>
	Organize 🔻 New folder						
	Favorites	Documents library Indudes: 2 locations				Arrange by: Fold	der 🔻
1 Browse to th	o rolovant imr	port file and click	te modified	Туре	Size		
			/11/2011 13:04	File folder			
Open to import.			/09/2011 09:17	File folder			
			/08/2011 10:20	File folder			
NOTE: The imp	oorted data wi	Il overwrite existing	/07/2009 05:53	File folder			
operator data		/08/2011 10:20	File folder				
operator data			/07/2009 05:53	File folder			
	Computer	My Videos	24/08/2011 10:20	File folder			
	Local Disk (C:)	A My Videos	14/07/2009 05:53	File folder			
	🖵 Accounts (\WF600) (F	🕌 My Widgets	25/08/2011 10:53	File folder			
	🗣 Network	beagull License Server	03/10/2011 17:23	File folder			
	1	Jend Send	15/09/2011 18:07	File folder			
		test.txt	30/11/2011 13:47	Text Document	1 KB		
		L.					
	File <u>n</u> a	me:			▼ Te	xt Files (*.txt, *.csv)	•
						<u>O</u> pen Ca	ancel

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	e you wish to import.						×
	Libraries •	👻 🌆 Search Documents			P			
	Organize 🔻 New folder						-	
	★ Favorites ■ Desktop	Documents library Includes: 2 locations				Arrange by:	Folder	•
	Downloads Recent Places	Name ^	Date modified	Туре	Size			
	_	🅌 BarTender	07/11/2011 13:04	File folder				
	Cibraries	🎉 BarTender	13/09/2011 09:17	File folder				
			24/08/2011 10:20	File folder				
1. Browse to the releva	int 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 d	ata will avan	write existing	24/08/2011 10:20	File folder				
	ala wiii 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:			• Te	ext Files (*.txt, *.csv	)	•
		,			·	Onen	Cancel	_
						<u>O</u> pen	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:

	N-SLM								
File	Edit Tools Help	1. Click <b>Tools</b> > <b>Options</b> from the program menu bar and select the Additional Fields Tab							
		Configuration Options							
	Transfer Data	Configuration Options X 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 <b>OK</b> when finished.									
The	ese field names will the	en 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					
Customer	ACME ENGIN	EERING			LOC	0 0 1
Account	ACME001					
AF3		For simple	e attendance monitor	ring t	he Location	
AF4			simply represent the			
			to the Locations data			

#### **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:

I EDIT Location			×	
Location Code	LOC001		$\sim$	
Description	RECEPTION			+ L O C 0 0 1
Customer	ACME ENGINEERING			
Account	ACME001			
AF3				FINISH LOCATION
AF4				
		Ok Cancel		

#### 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		$\sim$	
Description	RECEPTION			
Customer	ACME ENGINEERING			
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.

leference	Operator ID	SerialNo	Location	Start DTS	Finish DTS	Happed
	DIH001	026288	LOC005		06/12/2011 12:13:39	Oh Om Os
	DIH001	026288	LOC001	06/12/2011 12:13:50		Oh Om Os
	DIH001	026288	LOC005	06/12/2011 12:1 ::31		Oh Om Os
	DIH001	026288	LOC004	06/12/2011 12:1 3:3		Oh Om Os
	DIH001	026288	LOC002	06/12/2011 12:13.34	<b>▲</b>	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		
		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			
	1. Click Rep	ports		
Repo	nts			
R	eports			×
		Select R	eport	
	List Operators			
2. Select the report type requi				
list, and selection criteria for the Run Report to generate the re		<b>V</b>	Team	
		•	Serial No.	<b>_</b>
	Location Code	<b>v</b>		
	Customer	<b>_</b>	Account	<b></b>
	Additional Field 3	<b>~</b>	Additional Field 4	<b>_</b>
	Start Date 06/12/2011	Ţ	End Date 66/12/2011	<u>~</u>
		Run Report	Clear Selection	
0 M M+				
Scanned Locations [By ] Printed on Tursday00 December				
Location : LOC001 - RECEPTION stantDTS OpID Name	Team Serial No. Reforence			
Location : LOC002 - MAIN OFFICE ManDTS OpID Name		rt is generated. ata records whi	ch have been mar	ually en-
Location : LOC005 - REAR LOADING BAY	tered or edit	ed (see section	7.0 below) will be	
_StanDTS OpID Name	with an aste	risk in the left h	and column.	
Location : 0X-01 - BLING JEWELLERS <u>SunDTS</u> Op/D Name	Team Serial No. Reference Location Total : 0			
Location : R3-24 - DLING JEWELLERS 	Team Serial No. Reference Location Total : 0			
	Total : 0			
Repot produced by CPHSLM - Dedirant: Reading Systems LM	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				
	Ҟ Enter Relea				×				
	Keycode 557961 Release Code			2. OPN_SLM generates a random Keycode. Contact ERS for the relevant release code					
	Releas	ecode	Ok	C	ancel				