Calibration Toolbox ADO
Quick Start Guide – How to Send Recall Notices by E-Mail

This set of quick start guides is designed to help you to discover the main features of Calibration Toolbox ADO as quickly as possible. Like all sophisticated tools, it will take time and practice for you to become totally proficient, but you can begin to use some of its powerful features almost straight away.

Introduction

If you have a large number of devices under your control, it can be very time consuming to notify each user when their devices are due for calibration and must be returned to the Calibration Laboratory. This task is made simple by the Calibration Toolbox ADO e-mail tool.

The tool allows you to search the database for devices that require calibration, and then to send e-mails to the device users, or customers, with a message of your own choosing and listing only their devices.

The tool allows you to search the database for devices that satisfy the following conditions in any combination:

- Last Calibration, Next Calibration, or any other date field fall between any 2 dates
- Are in any particular Department
- Are in any particular Location - or any other category
- Are of any particular Device Type

The e-mail recipient can contain up to 4 different e-mail addresses.

Searching for Devices

You will obviously want to locate devices whose Last Cal or Next Cal dates fall between 2 specified dates, for example, you may wish to give users, or customers, 7 days' notice of calibration recalls. This is done by using the dates selector as shown in fig 1 below. So firstly, open the 'New Notices' tab.
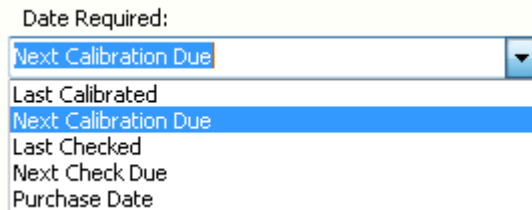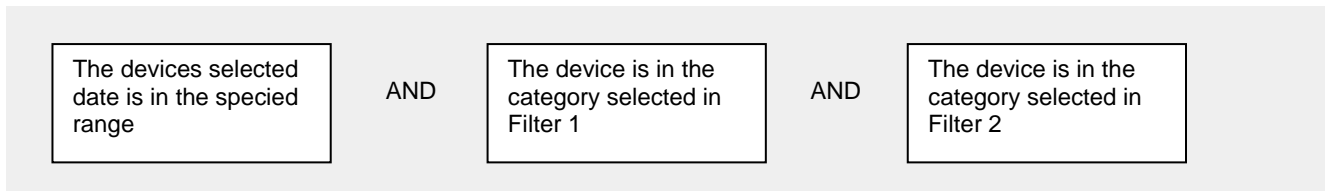

Fig 1:   The Date Selector

The listbox shown contains all of the visible date fields. Select the one you require from the list.

Then, with reference to fig 2 below, set the date range to apply to your search. You can either select to locate devices whose date (usually Next Calibration) expires within 7, 14, 28 days, or specify 2 dates of your own.

Fig 2:   Specifying Date Range

There are also two category filters that you can use if needed. The are applied in a logical AND in the data search, in other words if, for example, both Filter 1 and Filter 2 are used, the search result will yield those devices where:

The devices selected date is in the specied range	AND	The device is in the category selected in Filter 1	AND	The device is in the category selected in Filter 2

Fig 3:   Using Category Filters

When you have configured your search parameters, click the 'Search' button as shown in fig 2 above. Now look to the right-hand side of the screen. What has happened is this:

- Calibration Toolbox ADO has retrieved all the devices that match your search parameters, i.e. the instruments for which you need to issue recall notices.

- It has then sorted the devices retrieved by 'Recipient - this means that the e-mails sent will only include devices relevant to the particular Recipient.

- From each Recipient's details the software has extracted

  - The name of the Recipient
  - The four permitted e-mail addresses
  - The Friendly Name that is used in the greeting

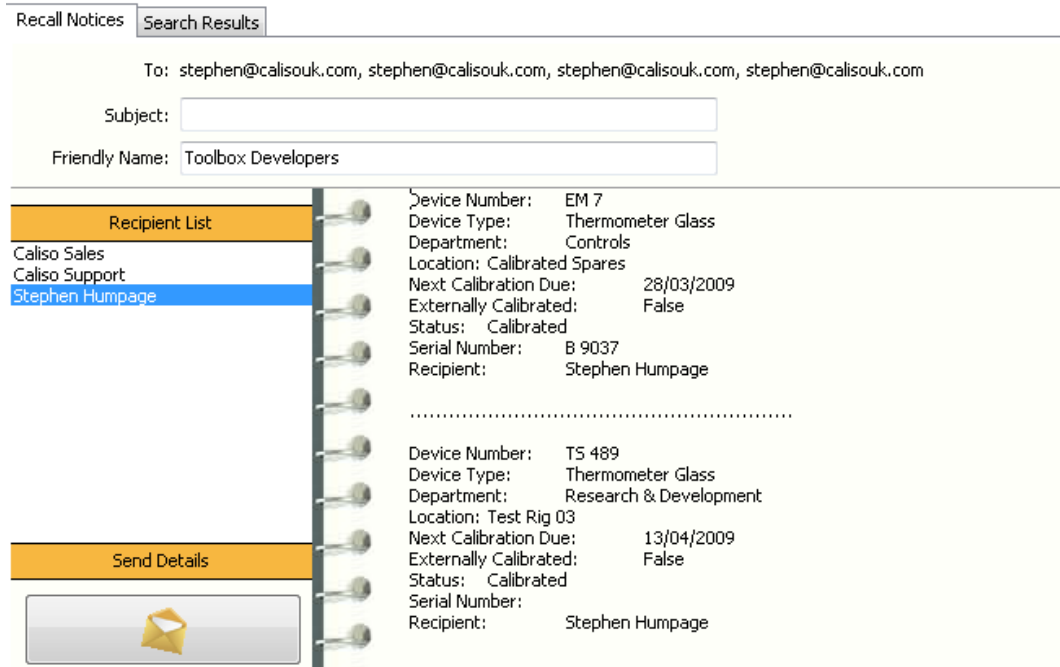With reference to fig 4 below we are now ready to take a look at the e-mails.

Fig 4:   The E-Mail Messages

Try clicking each entry into Recipient List, and notice how the e-mail addresses change, and the contents of each e-mail is different. As we said above, the e-mails sent will only include devices relevant to the particular Recipient.

Click the Send button (this has an envelope icon as seen in fig 4) to send the e-mail to the recipient highlighted in the Recipient List. Should you wish, you can use the attachment buttons, shown in fig 5 below, at attach files to your e-mails.
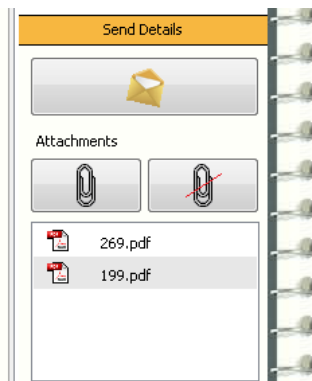

Fig 5:   Adding Attachments

There are only a few basic settings for you E-Mail tool (why complicate things?).

1   E-Mail Header and Footer

The e-mail header (see fig 6 below) is the fixed text at the top of the e-mail body, usually a brief statement of the purpose of the e-mail for example:

The following items are due for calibration please return them within the next 7 days.
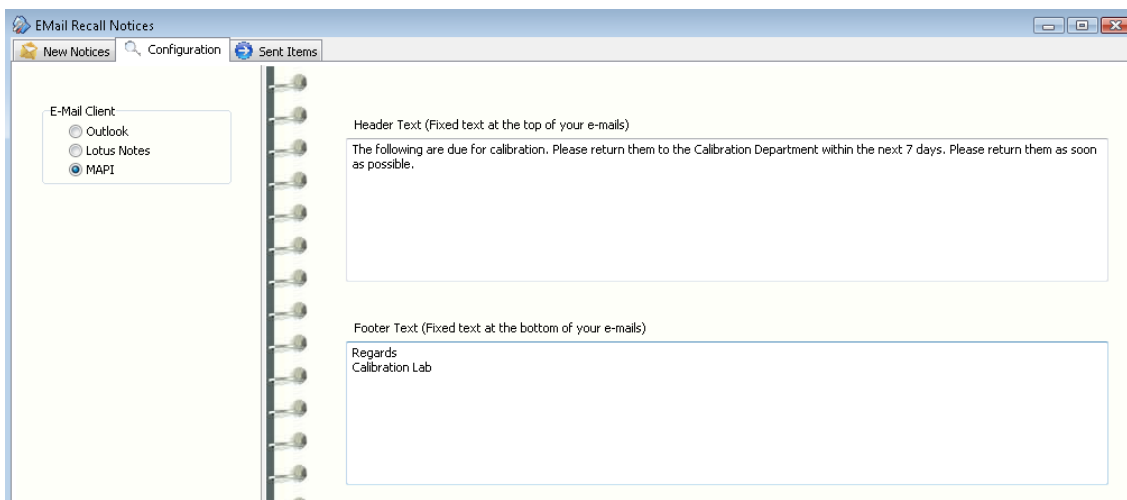

Fig 6: There are Only a Few Basic Settings

The e-mail footer is the fixed text at the bottom of the e-mail body, usually a short salutation for example:

Please contact the Calibration Lab if you need any assitance

Regards,
Calibration Department

You will prompted to save any changes made to the header, footer and e-mail client when you close the E-Mail window
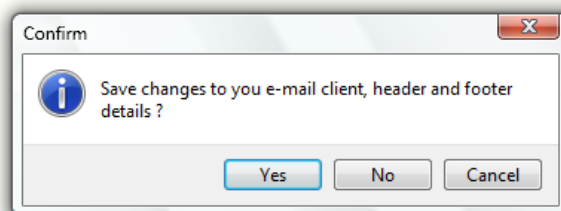

Fig 7:   Saving Changes to settings

2   The E-Mail Client

Once you have viewed the e-mails, you will obviously want to send them.

Calibration Toolbox ADO does not itself send the mails directly. Rather, depending on your e-mail program, it uses one of 2 methods to deliver the e-mails to the out-box of your own e-mail program (Outlook, Lotus Notes, Eudora, Firefox, etc):

The first method utilises a Windows feature called COM Automation which basically enables one application (in this case Calibration Toolbox ADO) to pass information directly to another (your e-mail client). This method is used for the Microsoft Outlook and Lotus Notes e-mail clients.

The other method employs Windows technique called MAPI (Mail Application Programming Interface) to place the e-mails into your e-mail program. This is used for programs such as Windows Mail, Eudora, Outlook Express and Mozilla Firefox.
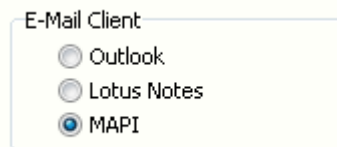

Fig 8: Selecting your E-Mail Client

You will prompted to save any changes made to the header, footer and e-mail client when you close the E-Mail window

Maintaining a Record of your Sent Messages

Calibration Toolbox ADO enables you to maintain a record of the recall notices that you have sent to your e-mail client. With reference to fig 9 below, select the 'Sent Items' tab. To the left you will see listed all of the e-mails sent. As you select each one the e-mails and their details, recipients, subject, body etc, will be displayed on the right-hand side.

In the top left-hand corner there are 2 buttons:

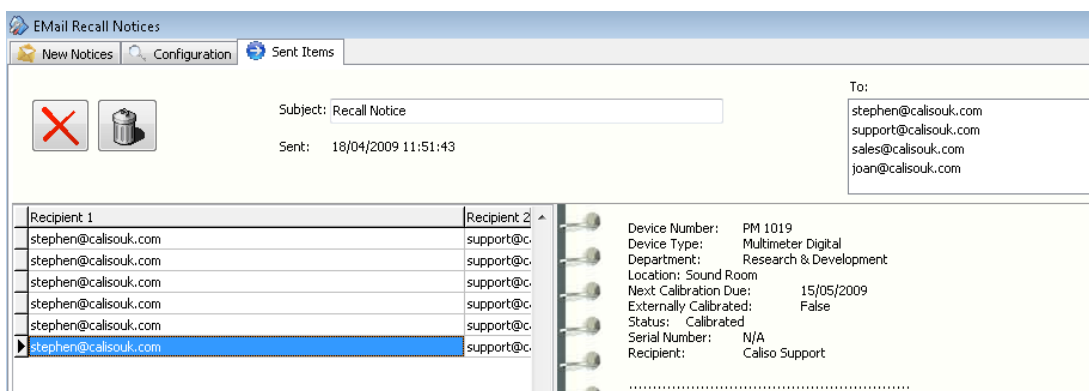- **Delete Current:**   Deletes the e-mail currently being shown

- **Empty Sent Items:**   Empties ALL items from the sent items list

Fig 9: Sent Items Display