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## Get Up and Running with CaliPro

CaliPro is a comprehensive calibration management system designed to streamline your operations, ensure traceability, and simplify customer interaction. It allows you to efficiently manage assets, certificates, schedules, jobs, and contracts, all within a single integrated platform.

This quick reference guide provides a handy overview of the CaliPro system, outlining its core functionalities, the relationships between key elements, and typical workflows. Whether a new user or a seasoned pro, this guide will help you get the most out of CaliPro.

Please refer to the options listed later in this document for more comprehensive support.

**Tip!** "Assets" encompasses assets, machines, and customer weight sets.

## How to Get Our Award-Winning Support

CaliPro is committed to providing exceptional support throughout your journey. Our team of experts is here to answer your questions and help you get the most out of the system. We are more than just a software provider; we are a strategic partner with deep industry knowledge, dedicated to your operational success.

Support Channel	Description	Best For
Quick Start Guides	Access step-by-step guides for CaliPro's core functionalities.	Getting started
Support Widget	Located on your CaliPro dashboard, this widget provides relevant help articles and lets you submit support tickets.	Finding answers to quick questions or submitting tickets for specific issues.
Email Support	For detailed inquiries, email <a href="mailto:support@calipro.co.uk">support@calipro.co.uk</a> . Our team will respond promptly based on the urgency of your request.	Detailed questions or complex issues.
Callback Request	Submit a ticket via the support widget or email to request a callback at a mutually convenient time.	Non-urgent issues, requiring a discussion.
Phone Support	For urgent issues requiring immediate assistance, call us at 0116 410 5500.	Urgent issues that require immediate attention.

We use an online ticketing system to track all support requests and record communication, ensuring our entire team can assist you whenever you need help. Providing a detailed description that includes steps to reproduce, or what happened vs what you expect to happen, helps speed up the support process.

## General Concepts & User Interface

CaliPro simplifies calibration management by providing a comprehensive system for recording calibrations, producing certificates, and ensuring traceability to National Traceable or UKAS standards. It offers additional features to streamline your operations, including scheduling, contract renewals, digital job sheets, and much more!

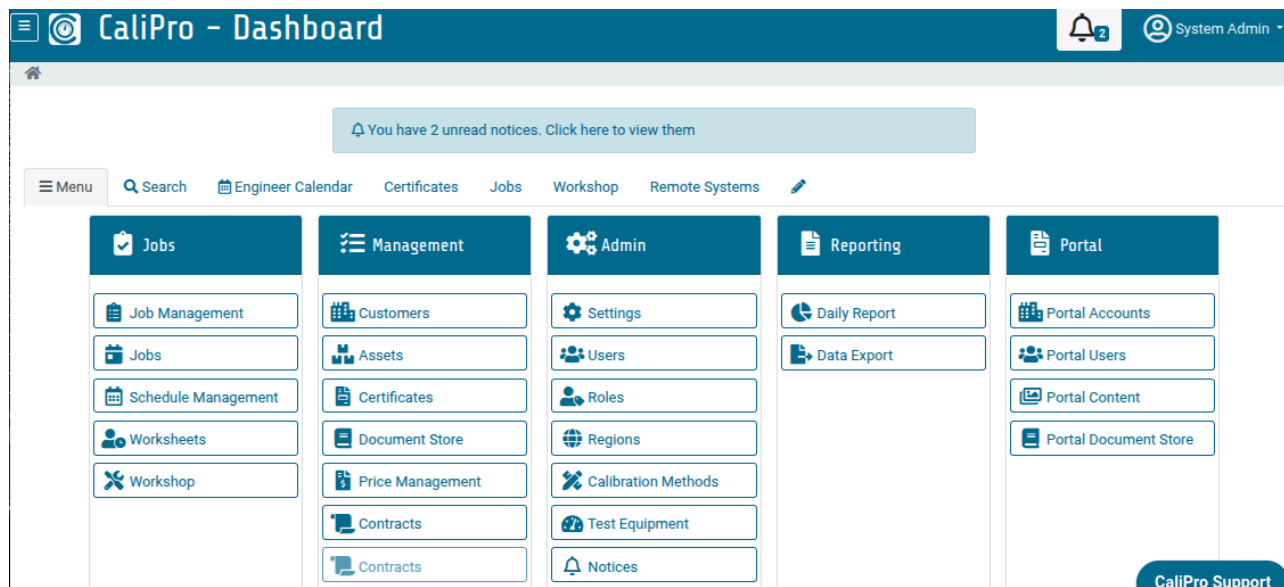
CaliPro Calibration Management consists of four parts:

1. **Central System:** This web-based application provides administrative functions for managing all aspects of your system. It requires a modern web browser and a reliable internet connection.
2. **Offline Systems:** These systems enable you to record calibration measurements and produce certificates in the field, even without an internet connection.
3. **Client Portal:** This portal allows your customers to access their asset information and certificate history, providing traceability back to your test equipment calibration.
4. **CaliPro-Go:** This mobile-first web application allows engineers to access their Job Calendar and Job Details from their mobile devices.

To maximise productivity, CaliPro's user interface (UI) incorporates several key concepts. Understanding these concepts will help you customise your experience and optimise your workflow.

# Dashboard

The dashboard is your central hub in CaliPro, providing quick access to all system functionality and customisation options.



## Tabs & Widgets

The CaliPro Dashboard has three core Tabs which are available to all users:

1. **Menu:** Provides access to all system functionality.
2. **Search:** A powerful global search that returns matching results from all modules.
3. **Engineer Calendar:** Displays the job calendar and events diary for all engineers.

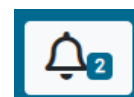


Users can create additional tabs for themselves and populate them with dashboard widgets to provide quick access to KPIs and other important information.

## Notices

Notices inform you of new features, deployments, hints, and tips.

 You have 2 unread notices. Click here to view them



**Tip!** Reading these notices will ensure you get the most out of CaliPro.

## Tables, Filters & Controls

Powerful table controls allow you to customise and filter displayed information.

### Quick Filters

- **Filter by:** Filters specific columns by values that frequently need to be filtered.
- **Filter by Rows Containing:** A generic filter that searches all columns for matching text.
- **Column Filter:** Advanced filtering options within each column heading, using various logic gates.



### Table Settings



Control which columns are displayed, their width, and their order.

**Tip!** These settings are saved between logins from the same device.

### Side Panels

Information is typically displayed in a main table with a side panel providing quick access to additional details about the selected row.

The side panel also contains buttons for related system functions.

### Smart Buttons

Smart Buttons streamline your workflow by offering:

- A menu of all available actions (on the right).
- The most likely action, based on the selected row's status (on the left).

### External Links

An external link icon allows you to open related records in a new browser tab without losing your current context (e.g., opening a contact record while working on a job).

Contact Name

Select



### Dynamic Navigation

CaliPro employs dynamic navigation to provide context-sensitive information and prevent data overload. This means the information displayed adapts based on how you navigate the system.

For example:

- Dashboard > Job Management: Displays all active jobs.
- Customer Record > Job Management: Displays all jobs for that specific customer, including published and void jobs.

This design choice avoids displaying all jobs for all customers at once, which would be overwhelming and inefficient. Instead, you see the relevant information based on your current context.

## Definitions

- **Asset:** Any customer equipment stored within the system for Calibration, or other purposes.
- **Service:** A specific action performed against an Asset.
- **Action Status:** The result of a Service.
- **Schedule:** The regular frequency at which a Service needs to be completed on an Asset.

## Key Concepts

### Schedule Due Date vs Next Calibration Date

- **Schedule Due Date:** This is an internal scheduling marker, indicating when a service is *scheduled* to be performed.
- **Next Calibration Date:** This reflects the *actual* date the asset is due for calibration, according to its calibration cycle.

The separation is crucial for handling situations where a scheduled service is not completed. If you're unable to calibrate an asset on the scheduled date and a return visit is not required, the Schedule Due Date might be updated, but the Next Calibration Date will remain unchanged. This correctly flags the asset as overdue for calibration, even though the scheduled service was missed.

## Customer, Assets & Certificates

CaliPro is designed to be customer-centric, providing easy access to all customer data from their record within Customer Management.

### Customers

The Customers section displays all customer records with various filtering options. From a customer record, you can easily view or add:

- |                |                  |
|----------------|------------------|
| • Sites        | • Contacts       |
| • Assets       | • Contracts      |
| • Certificates | • Jobs           |
| • Documents    | • Workshop Repai |

### Assets

Assets are created for customers and linked to a specific site. These assets can be related to one of our core modules:

- **Assets (Upload):** For general asset management.
- **Assets (Templates):** For custom Asset Types.
- **Machines (Weighing):** Specifically for weighing equipment.
- **Customer Weights (Weight Comparison):** For managing weight sets.

## Asset Templates

The *optional* Asset Template module allows you to define custom templates for dynamically creating assets and certificates to meet your specific requirements. These templates are suitable for most National Traceable calibration certificates. UKAS certificates require a dedicated module.

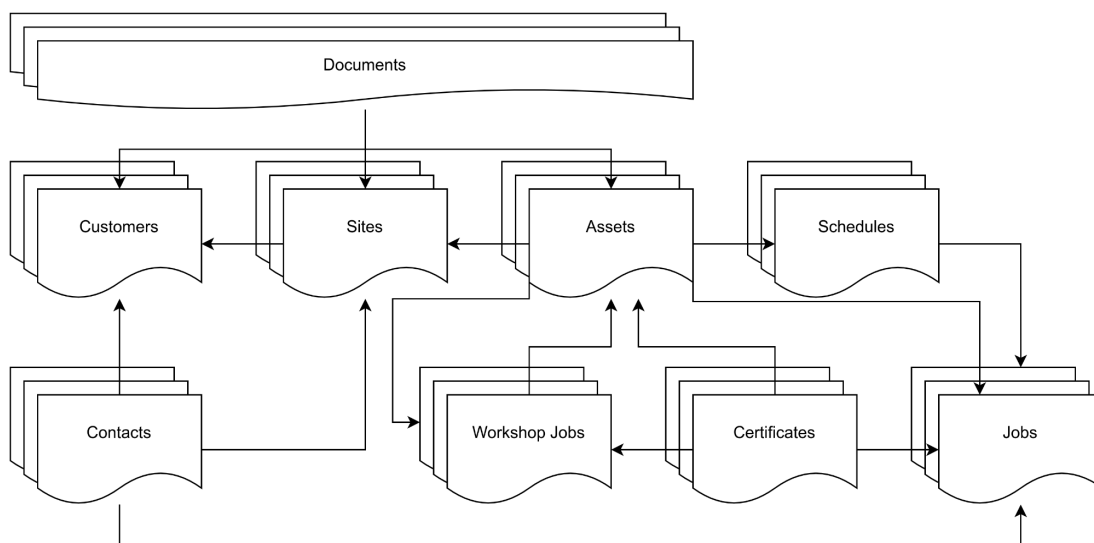
## Certificates

Certificates are ideally created via a Job, which links them to a Digital Job Sheet and allows for better reporting. However, you can also create standalone certificates by navigating to *Customer > Certificates* or *Customer > Assets > Certificates*.

## Test Equipment

The Test Equipment section manages all your test equipment and their corresponding calibration certificates. This ensures traceability and provides engineers with the necessary information to confirm their equipment is calibrated when performing calibrations.

## Basic Relationship Structure



**Customers** consist of multiple sites and contacts.

**Sites** consist of multiple assets.

**Contacts** are linked to assets, sites and customers.

**Certificates** are linked to assets, jobs and workshop jobs.

**Schedules** consist of services for multiple assets.

**Contracts** consist of a cover level and scheduled services for multiple assets to be completed during the contract.

**Jobs** consist of services for multiple assets. The services can be populated from schedules or allocated ad-hoc to the requirements of a job.

**Workshop Jobs** are linked to an asset and can contain multiple services. They can be returned via courier or a Workshop Return Job, allowing an engineer to return the asset to the Customer Site and complete any outstanding services.

**Documents** can be uploaded and linked to Customers, Sites, Makes, Models or individual Assets.

## Job Cycle

### Job Management (Administration)

- Create new Scheduled or Callout jobs for a customer and allocate them to engineers.
- Review completed work to ensure administrative and finance tasks are completed.

### Jobs (Engineer)

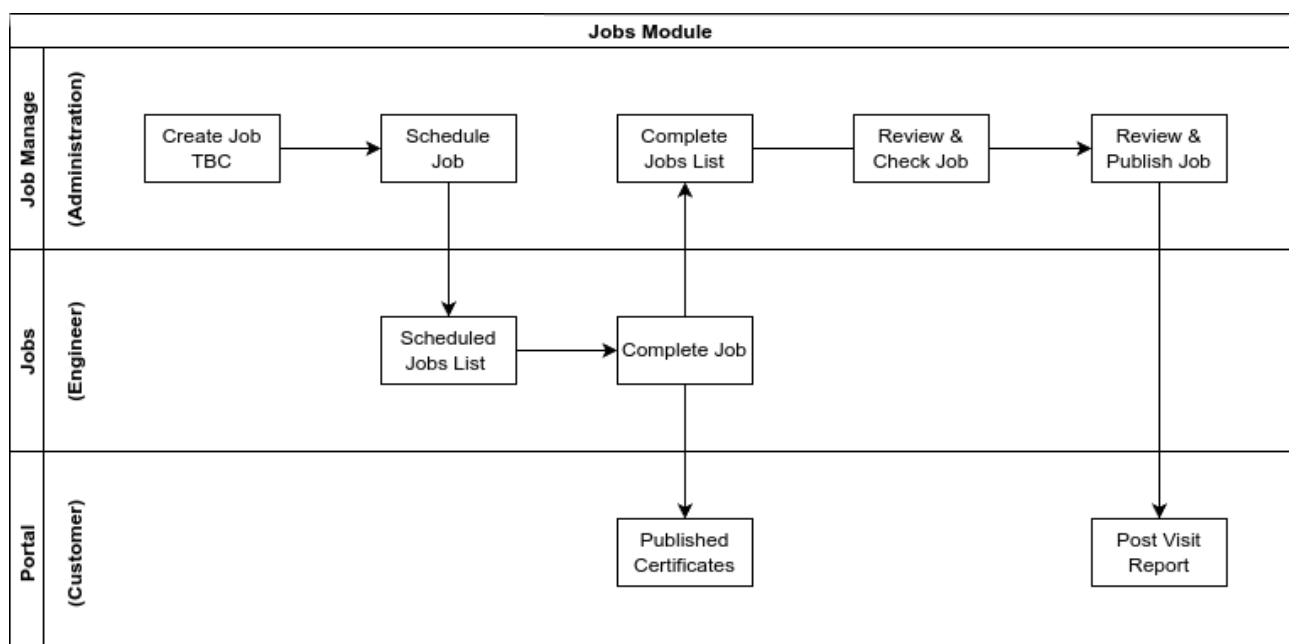
- An engineer-focused interface that is used to complete the required services within a Job Sheet and record time in their Worksheet.

### Reporting (Administration)

- Reports are available to see completed work and analyse performance.

### Client Portal (Customer)

- Presents a Digital Job Sheet, PDF Post Visit Report and Published Certificates to your customers. Certificates are available immediately upon publishing. Post Visit Reports are available once the Job is Published from Job Management.



# Workshop Cycle

## Workshop (Administration & Engineers)

- Create and manage workshop jobs from receipt by the workshop, assessments, quoting, repair details and return to customer

## Job Management (Administration)

- Schedule completed workshop repairs, or new goods, for delivery to the customer via an engineer with the option to complete some services on-site.

## Jobs (Engineer)

- Engineer-focused interface used to bring an Asset from the site back to the Workshop for repair. It is also used to return a completed repair to the site, completing any services still required.

## Reporting (Administration)

- Reports are available to see completed work and analyse performance.

## Client Portal (Customer)

- Presents Certificates and Post Visit Reports to your customers. Certificates are available immediately upon publishing.

