FLUKE®

DPCTrack2™

Calibration Management Software

Users Guide

March 2012 Rev. 1, 3/13
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Introduction

DPCTrack2 Calibration Management Software (the Software) helps you manage instrument calibration and maintenance. Make, update, and manage records for a variety of item types that include:

- Test Instruments
- Loops
- Equipment
- Calibrations

The Software lets you download your calibration procedures into a Documenting Process Calibrator (DPC) for field use. It also lets you upload field test results to a calibration or instrument database.

How to Contact Fluke

To contact Fluke, call one of the following telephone numbers:

- Technical Support USA: 1-800-44-FLUKE (1-800-443-5853)
- Calibration/Repair USA: 1-888-99-FLUKE (1-888-993-5853)
- Canada: 1-800-36-FLUKE (1-800-363-5853)
- Europe: +31 402-675-200
- Japan: +81-3-6714-3114
- Singapore: +65-6799-5566
- Anywhere in the world: +1-425-446-5500

Or, visit Fluke's website at www.fluke.com.

To register your product, visit http://register.fluke.com.

To view, print, or download the latest manual supplement, visit http://us.fluke.com/usen/support/manuals.

The latest software trial version of DPCTrack2 can be downloaded at www.fluke.com/DPCTrack. For more information see “Communication with a PC”.

753/754 Accessories can be found at www.fluke.com/process_acc .

Installation Requirements

- Pentium class 667 MHz or higher processor
- Minimum of 256 MB of RAM (512 MB or more recommended)
- Windows XP (or newer) operating system
- At least 500 MB of free hard disk space
- CD-ROM drive

For calibrator communication:

- USB 1.1 or higher

User Groups, User IDs and Passwords

The Software includes three predefined User Access Groups with Users assigned to them and one Technician Group with one Technician assigned. All users must be assigned to one of the predefined User Access Groups.

Note

The User IDs and Passwords listed are not case-sensitive.

The predefined User Groups are:

- **ADMIN**

  The Admin (Administrator) has full access to all areas of the Software. The Admin can do administrative responsibilities, such as change system options, back up data, add technicians and other users, add user-defined variables, erase data, and more. Typically, one person is the Admin of the Software. The User ID and default password for the Admin User group is ADMIN/ADMIN.

- **USER**

  The access rights of the User are different from those of the Admin. A User cannot do administrative tasks. The User can approve changes, add or change records, download and upload tasks to the DPC and see logged data. The User ID and default password for the User Group is USER/USER.

- **READONLY**

  The access rights of the READONLY user are more strict than those of the User. Data can only be read. READONLY users can download and upload tasks to the DPC to give Test Results records. The User ID and default password for READONLY User Group is READONLY/READONLY.

- **TECH**

  The Technician Group is TECH.

  There are no access rights for the Technician. The Technician group is for display only. For example, Who Calibrated or is the Responsible Technician for the record shown? There is no User ID or password for the Technician.

How to Install the Software

Note

The Software is fully-functional Trial Software. The trial period expires after 60 days. See the "After the Trial Period" section.

To install the Software from the CD-ROM:

1. Put the CD-ROM into your computer CD-ROM drive. If the CD-ROM presentation does not start, go to Windows Explorer, find the CD-ROM drive and click on "launch.exe". The presentation launches. See Figure 1.

Note

The Software can also be downloaded and installed from http://www.fluke.com/dpctrack2. Click on the Download Software link.



gts001.jpg

Figure 1. Software CD-ROM Screen

2. Click on the **Install DPCTrack2 Software** button.
3. For both CD-ROM and Internet installation, follow the onscreen prompts to install the Software.
4. The End-User License Agreement is shown. The software will not install if you do not accept the End-User Agreement.

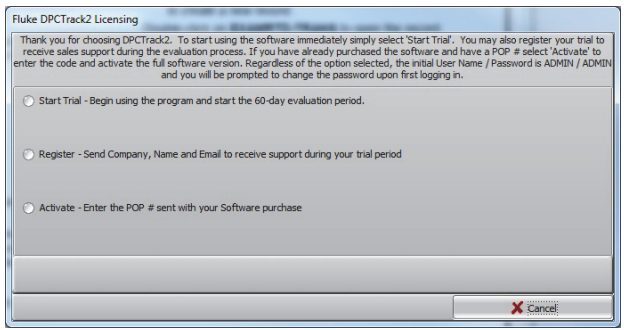
   The default location for the Software installation is **C:\Program Files\Fluke\DPCTrack2** or **C:\Program Files (x86)\Fluke\DPCTrack2** on a 64-bit PC. You can choose a different location when you install the Software if necessary. The data directory defaults to: **C:\DPCTrack2\Data**. You can choose a different location during installation if necessary.

   Note

   The data directory can be on a shared network storage device but only this version of the installed Software can access it.
5. For **Setup Type**, select **Standard**.

Software License

The first time you launch the Software you see the Licensing Screen. See Figure 2.



gts002.jpg

Figure 2. Licensing Screen

Three install types are available:

1. **Start Trial**

   Start Trial lets you use the Software for the first 60 days. See the “After the Trial Period” section for more information.

2. **Register**

   You can register at these times:

   - During the first launch when you select Trial (instead of Activate).
   - Each time a Trial expiration warning is shown (if you have not registered).
   - Through a menu option **Help> Register Trial** (if you have not registered).

   The registration procedure is the same, regardless of which registration choice is selected. You must record:

   - Company
   - First Name
   - Last Name
   - E-mail Address
   - Phone Number.

3. **Activate**

   Activate prompts for a POP Number and other information for verification. This data is sent for confirmation and used to make an Activation Code which is sent to you for entry into the Software.

After the Trial Period

If you do not register the Software after 60 days, you can continue to see data that was recorded in the Software database. The Software lets new results in the DPC be uploaded to the PC but only as a txt file. The new results will not go into a database that was made during the Software trial. If data is recorded in the trial period and it is necessary to save that data, it is recommended that you purchase the Software before the trial period ends.

How to Remove the Software

The Software can be safely removed from your PC. Go to your system *Control Panel,* and click **Add or Remove Programs** (for Windows XP users), or the **Programs and Features** (for Windows 7 users). Click **Fluke DPCTrack2** from the list, and select **Uninstall Program**.

Software Updates

After the Software is installed and launched, go to the Help menu and check for updates. The Software tells you what to do if it finds that updates are necessary.

Run the Software for the First Time

You must record a login and password each time you operate the Software. The first time you use the Software, the Login and Password are each "ADMIN" (without the quotation marks and not case sensitive). On older versions of the Software, you must change the password when you first login. In later versions, this is not necessary.

Note

*You **must** remember your Login and Password or the Software will lock you out. If you are locked out, you must contact Fluke Technical Support. See "How to Contact Fluke". You have three chances to login before the Software locks you out. You can change the login lockout parameters in the System Options menu. See the "System Options" section.*

When you have logged into the Software, you can access all of its functions and also change some of the system options. See System Options.

Language Selection

The Software features a localized user interface. The subsequent languages are available:

- English
- French
- German
- Italian
- Spanish
- Portuguese

The default language can be selected when the Admin installs the Software. Users can also change the user interface language associated with their account at any time.

To change the localized user interface after installation:

1. Go to the **File** menu and select **Change Preferred Locale**.
2. Select the necessary language. See Figure 3.

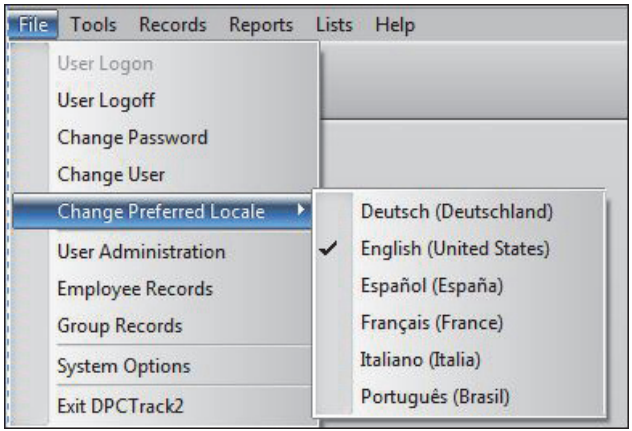


Figure 3. Language Selection

The Software interface changes to the user-selected language. The language choice is stored as part of the user preferences. Each time the user logs in, the Software interface uses the saved preference. If the Admin has set the interface environment to a particular language, a user can still change to another language of their choice.

A user with Admin privileges can use the **System Options** dialog to change the interface language, which includes the default language for new users. If this setting is changed, it does not affect the language settings associated with the current user.

USB Driver

When you install the Software, a USB driver is also installed so that the DPC can communicate with the Software via USB cable. The driver lets you use the DPC with other software packages.

If you need to re-install the USB driver, download it from http://www.fluke.com. Select the Software Downloads link under the Support tab. On the Software Downloads page, select the Process Calibration link and then click on "Download 753/754 Windows Driver" under the "Download DPC/TRACK2™ Software" section. This is an executable file that will launch and install the driver.

Client Server Solution

If multiple-client Software is necessary to access one shared database, there is a Client-Server version of a comparable product that lets you do this. ProCalV5 provides network-sharing capability and other advanced tools. DPCTrack2 is for one PC only. It lets you have multiple user accounts on that single installation. ProCalV5 lets you share Documenting Process Calibrator data with others. For more information or to purchase ProCalV5, go to http://www.DPCTrack2.com.

How to Check Communication

Connect the DPC to the computer with a USB cable.

To verify communication between the DPC and the Software:

1. Click  .
2. In the Ports section of the screen, you will see the DPC. If you do not see the DPC listed, or you have reason to think the Port information needs to be updated, click  to refresh the view.

   Note

   *If you still do not see the DPC listed, go to the **Windows Device Manager** and see if the **Fluke 753/754 (COM#)** entry is shown under **Ports (COM & LPT)**. If the DPC is not shown, reconnect the DPC to the PC and do step 2. If you have a 74X connected, then "**USB Serial Port**" is shown.*

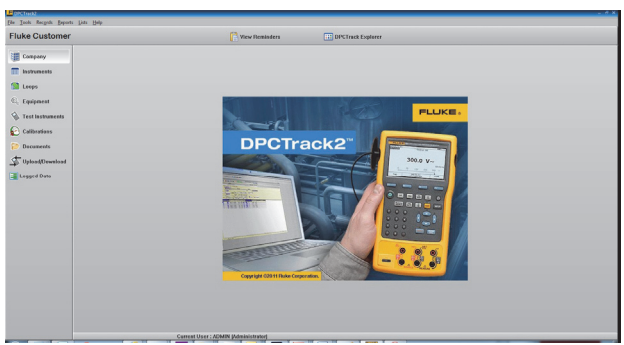
Brief Tutorial

The Home Screen

From the Home screen, you can navigate through the Software to set up and do necessary tasks. Some of the functionality of the Software is only available through the Home screen. See Figure 4.

Navigation Buttons

The navigation buttons on the left of the Home Screen access different record sections of the Software. Right click on the buttons and choose "Show Captions" and the button names are shown. The navigation buttons are shown in Table 1.



gts007.jpg

Figure 4. Home Screen

Table 1. Navigation Buttons

Button	Description
	**Company-** A Company record must be made before you can record device information. The Company record contains name, address, contact information, options, and a selection of default report choices.
	**Instruments-** Use this screen to add, show, change, and remove instrument records. General information, Calibration points, and other data about each instrument are put into this record.
	**Loops-** Use this screen to record data about the loop components or equipment used in your test environment. Information about the location, personnel, calibration points, and more can be recorded.
	**Equipment-** Use this screen to record data about the equipment used in your test environment. General information about the equipment, instruments and loops, and more information can be recorded.
	**Test Instruments-** Use this screen to record data about the test instruments used in your environment. General information about the instruments, calibration points, and more information can be recorded.

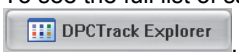
Table 1. Navigation Buttons (cont.)

Button	Description
	**Calibrations-** Use this screen to add, display, change, and erase the results of an instrument, loop, test instrument or system calibration. After you have recorded master instrument, loop and test instrument records, you can make calibration records from those you already recorded in the database.
	**Documents-** Calibration document records can be linked to this screen. Use this screen to add, show, change, or delete document records.
	**Upload/Download- Upload**- Data (calibration results for example) is sent to the Software where it is stored in the Software database. **Download**- Data is taken from the Software (tasks and calibration procedures for example) and stored temporarily in the DPC for field use.
	**Logged Data-** Use this screen to import recorded logged data from the DPC to the Software. Logged data can only be uploaded through this screen.

Notice that as you move through each of the different sections of the software, the menu bar above the main window changes for each current record type.

How to Access Sample Records

The Software comes with sample records that you can use to learn more about how the Software works.

To see the full list of sample records, click 

. This will show you a new list of existing records in a vertical bar parallel to the navigation bar.

A list of folders is shown on the left:

- Instrument
- Test Instrument
- Cals Due in 45 Days

Note

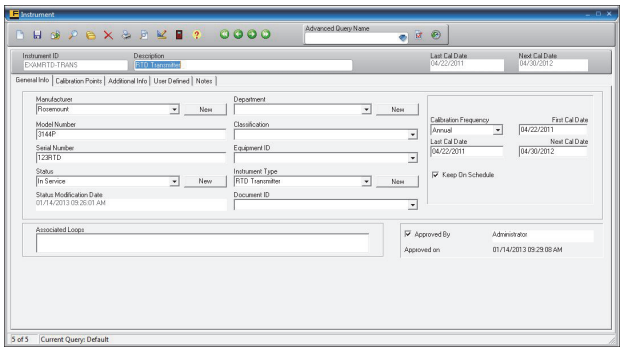
Records of equipment and loops will also show if they have been added.

Double-click **Instrument** and sample instrument records are shown. For the tutorial, you will make a copy of the "EXAMRTD-TRANS" (Example RTD Transmitter) record.

Notes

- *These examples can be changed or copied and used as the basis for new records. When changed, they can be saved to the DPCTrack2 database and, as needed, downloaded to the DPC as a task.*
- *You can erase the sample records so they do not contaminate your actual data. The sample records could potentially be included in your reports and data analysis. However, remember that sample records can be copied, changed, and saved as new records. Use the copy command to do this. This is the most simple way to create a new record.*

Double-click on **EXAMRTD-TRANS** to open the record. The Instrument Screen is shown. See Figure 5.



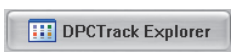
gts004.jpg

Figure 5. Instrument Screen

How to Copy a Record

To make a copy of this instrument record:

1. Click on **File>Copy Record** on the top menu bar. Note that the **Tag ID** field in the instrument record clears itself.
2. Record a new Tag ID for the instrument record.
3. Click  on the Instrument Record Screen to save the new instrument record.

   The new record does not automatically show in the instrument list on the left. To see the new record in the list:
4. Right click on 

and click **Refresh Tree** to refresh the instrument list.
5. Double click on the **Instrument** folder. The new instrument record is shown in the list.

How to Change an Instrument Record

For this section, you will change the calibration data.

1. Click on the **Calibration Points** tab on the changed instrument record. Use this screen to add or change calibration values.
2. You can change the parameters input type, output type, and low and high ranges to match your device type.
3. Click the **DPC Settings** button for mode options.
4. Click the **Calculate** button and the Software automatically calculates the test points for you.
5. After you change the data, save and close the record.

How to Make, Revise and Retire an Instrument Record

Instrument records can be made or revised in the Software. The subsequent sections give short descriptions of instrument record creation, revision, and retirement.

How to Make an Instrument Record

This procedure is available to ADMIN and USERs. To make an instrument record:

1. Click  and open the Instrument Record Screen.
2. Click  to make a new instrument record.
3. Record the instrument information into the correct fields of the form.
4. Approve the record in the bottom right corner. Check the “Approved By” box.
5. Click  to keep the new record.

How to Revise an Instrument Record

This procedure is open to ADMIN and USERs. To revise an instrument record:

1. Click  and open the Instrument Record Screen.
2. Click on  to open a list of Instruments.
3. Double click on the instrument record that you will change. The Instrument Record Screen for the newly-selected record opens.
4. Change the record as necessary.
5. Click  to save the record.

How to Retire an Instrument Record

This procedure is available to ADMIN and USERs. To retire an instrument:

1. Click  and open the Instrument Record Screen.
2. Click on  to open a list of Instruments.
3. Double click on the instrument record that you will retire. The instrument record opens.
4. Change the status to “Inactive” or “Out of Service”.
5. Click  to save the record.

Make, Revise, and Retire a Test Instrument Record

The Software keeps data for Test Instruments and Instruments separately. To make, revise, or change a Test Instrument Record, see the subsequent sections.

How to Make a Test Instrument Record

This procedure is available to ADMIN and USERs. To make and instrument record:

1. Click  and open the Test Instrument Record Screen.
2. Click  to make a new instrument record.
3. Record the instrument information into the correct fields of the form.
4. Approve the record in the bottom right corner. Put a check mark in the “Approved By” box.
5. Click  to save the record. The record has been created.

How to Revise a Test Instrument Record

This procedure is open to ADMIN and USERs. To revise an instrument record:

1. Click  and open the Test Instrument Record screen.
2. Click on  to open a list of Instruments.
3. Double click on the test instrument record that you will change. The record opens.
4. Change the record as necessary.
5. Click  to save the record.

How to Retire a Test Instrument Record

This procedure is available to ADMIN and USERs. To retire an instrument:

1. Click  and open the Test Instrument Record Screen.
2. Click on  to open a list of Instruments.
3. Double click on the record that you will retire. The instrument record opens.
4. Change the status to “Inactive” or “Out of Service”.
5. Click  to save the record.

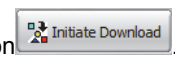
Download and Upload Data

The subsequent sections give you more information about the Data Upload and Data Download functions.

- **Download**- Data is taken from the Software and recorded into the DPC.
- **Upload**- Data is added to the Software.

How to Download Data to the DPC

To download data from the Software to the DPC:

1. Click .
2. Select the Instrument from the list, in this case “Instrument EXAMRTD-TRANS”.
3. Click the **Download** tab.
4. Make sure that your DPC is selected in the Ports window. If you have problems, see the How to Check for Communication section.
5. Click on 

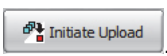
. The Software downloads information to the DPC.

To find this data on the DPC:

1. Push the **More Choices** softkey.
2. Push the **Tasks** softkey.
3. The downloaded task shows on the display.
4. Push the **Go To Task** softkey.
5. Add the task number.
6. Push the **Done** softkey.
7. Push ENTER.

How to Upload Data to the Software

To upload the data from the DPC to the Software:

1. Click .
2. Click the **Upload** tab.
3. Make sure your DPC shows under **Ports**.
4. Click 

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The data uploads from the DPC to the Software.

If the Tag used for a result is not found in the Instrument or Loop screens, you will be prompted to save the result to a file. To prevent this, make an Instrument or Loop record beforehand. The record ID must be the same as the Tag on the DPC associated with the upload data.

After you authorize a calibration during upload, you can see and update the calibration record in the calibration screen if there are additional values to view, edit, or remove from the record.

How to Print Reports

The Software includes many reports that you can print. From the Home Screen, select **Reports** from the top menu. A list of report categories is shown:

- Alert
- Calibration
- Company
- Document
- Equipment
- Instrument
- Inventory
- Logged Data
- Loop
- Test Instrument
- User

In these report categories there are multiple reports that show a wealth of data each category.

To print a report:

1. Select the report from the list (**Reports>[Report Name]**).
2. Click on the **Preview** button at the bottom of the report window to see the report first, or click the **Print** button to print the report.

How to Print Records

You can print records from these menu locations:

 Instruments

 Test Instruments

 Calibrations

 Document Records

 Logged Data

To print a record from these locations, click  on the top of each window.

Note

Each Instrument has a unique tag assignment. If you change a data tag and then upload it to the Software, the tag is different than it was originally and the Software will ignore the tag.

System Options

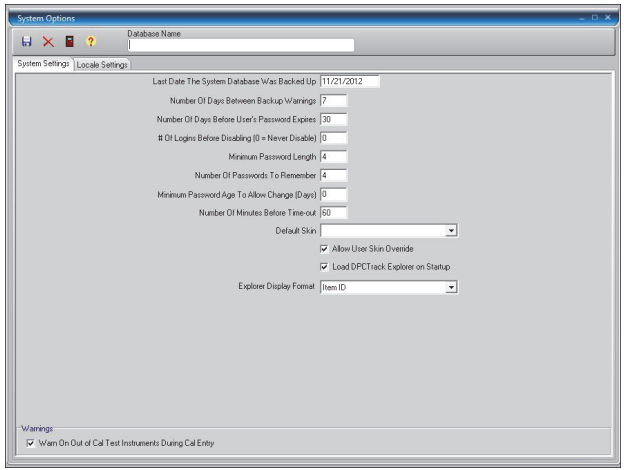
You can change many of the system options of the Software.

Note

Only members of the ADMIN group have access to the System Options.

To change system options:

From the Home Screen of the Software, select **File>System Options**. The System Settings screen is shown. See Figure 6.



gts006.jpg

Figure 6. System Settings

From the System Settings screen, you can change these options:

- Last Date The System Database Was Backed Up
- Number of Days Between Backup Warnings
- Number of Days Before User's Password Expires
- # of Logins Before Disabling (0 = Never Disable)
- Minimum Password Length
- Number of Passwords To Remember
- Minimum Password Age To Allow Change (Days)
- Number Of Minutes Before Time-out
- Default Skin
- Explorer Display Format

You can change these and other settings from the Locale Settings screen:

- Date Format
- Number Format

When you have changed system settings, click on  at the top of the System Options screen to save the setting. The settings are self-explanatory. For more information, see the *DPCTRACK2 Users Manual*.