



User's guide

you.trace.it

CHAPTER 1

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CHAPTER 2

Getting Started

Welcome to the user's guide for you.trace.it, the material tracking & tracing and product quality management software.

Read this chapter to become familiar with the general functionality of you.trace.it, its system requirements, the installation procedure, the work area, program navigation and toolbars.

Introduction

What is you.trace.it

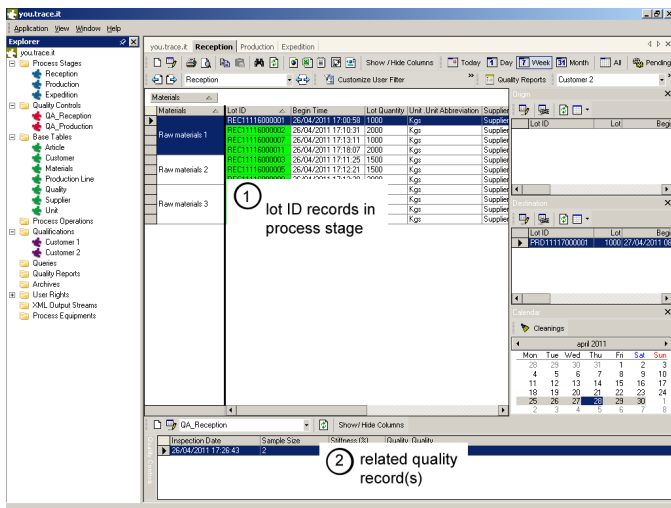
Requirements for traceability solutions differ from business to business. Every article requires a different approach and manufacturers want to keep records that relate to their own production process.

you.trace.it is Tracewise's database-driven traceability and quality management solution. Thanks to the unique VBScript modelling environment (*), the software can be customised to meet the requirements of any business or any kind of process.

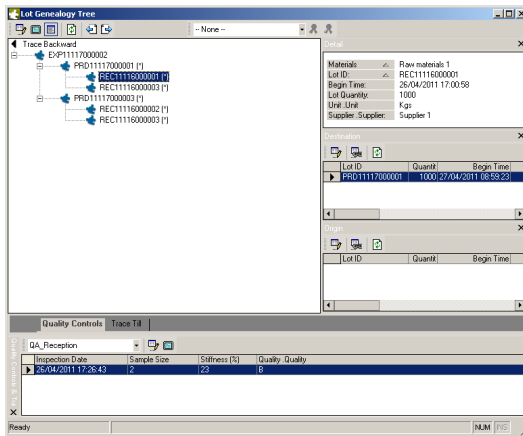
(*) you.model.it is the integration toolbox for you.trace.it. It allows to define how traceability records are kept for an organisation, what information must be stored, the functionality of you.trace.it, etc.

Software functionality

The major components in you.trace.it are process stages. They represent the operations through which units or batches are followed. To identify the units or batches, they get a unique lot ID, which is stored with related process information in the database.



Related lot ID records in consecutive process stages are linked, which makes it possible to track and trace the path of units or batches through all the intermediate steps of the production flow. See CHAPTER 4.



Additionally, quality characteristics can be inserted at critical control points for the batches represented by the lot IDs. Either automatically or manually, quality results on samples taken from the batches in a specific process stage are inserted into the database and linked to the lot ID record. This way, track and trace operations reveal the quality of the traced goods. See CHAPTER 5.

To allow consistent and quick data entry, you.trace.it provides for base tables. Base tables contain reference data which identify records in process stages and quality controls. For example, to indicate the supplier of materials when inserting incoming batches. See CHAPTER 6.

you.trace.it also includes:

- Qualifications to define limits for attributes. Non-compliant attribute values are highlighted. This way, you immediately notice which lot IDs meet the requirements of your customers. See CHAPTER 5.
- SQL and XML query builders to compare and exchange any data stored in the database. See CHAPTER 7.
- User security to assign access rights to users and user groups. See CHAPTER 8.




System requirements

The following hardware and software is required to run you.trace.it:

- 1 GB of random-access memory (RAM)
- 250 MB of available drive space
- Local or network licence key
- Intel Pentium processor recommended
- Windows XP or later
- MS SQL Server
- Colour monitor with a screen resolution of 1024 by 768 pixels
- Microsoft Internet Explorer and Acrobat Reader.

Pictogram usage

This user's guide uses the following pictograms to draw your attention:

Image	Description
	Supplementary suggestions, advice or remarks, in order to enable you to perform a task more easily or more quickly.
	Cautions draw your attention to operations, which, if performed incorrectly, could result in loss of data or undesired results. This, in turn, would imply that you would have to repeat the operation in part or in full.
	References point to related topics in this user's guide.

What's new

New features in you.trace.it 3.0 are:

- Improved user interface.
- User security allows to assign user rights to users and user groups.
- When linking lot IDs, you can indicate the linked quantity.
- Process stage grid displays linked quality records in integrated quality grid.
- Origin & destination panels display parent and child lot ID records in consecutive process stages.
- Qualifications take the values of linked quality records into consideration when assessing lot ID records.
- Design & print quality reports.

Regional settings

you.trace.it takes into account some regional options of the local system.

Check the settings under Control Panel, then open Regional Options.

Decimals

you.trace.it users must apply the decimal symbol (period or comma) when entering values in numeric fields in order to separate the integer part from the decimal part. Note that commas as decimal symbols can only be entered using the alphanumeric keyboard! Periods can be inserted using both the alpha- and numeric keyboard.

Date & time

Regional date/time options are taken into account for fields where a date and/or time is displayed. Depending on the DateTimePicker control's settings, you may customise Short Date and Long Date formats in the system's Regional Options.

Input Locale

you.trace.it does not take the Input Locale into account to determine the interaction language. Only standard buttons in message boxes (like Ok, Cancel, Yes, No) follow the Regional Language Options. See page 22.

Quick guide

To make you familiar with the way you.trace.it handles traceability and quality records, we rely on the case study explained here. It involves a general production environment where different sorts of raw materials are bought in bulk. Those materials are turned into articles. The articles are packed in boxes and shipped to the customers on pallets.

Reception (of raw materials)

Lot ID records

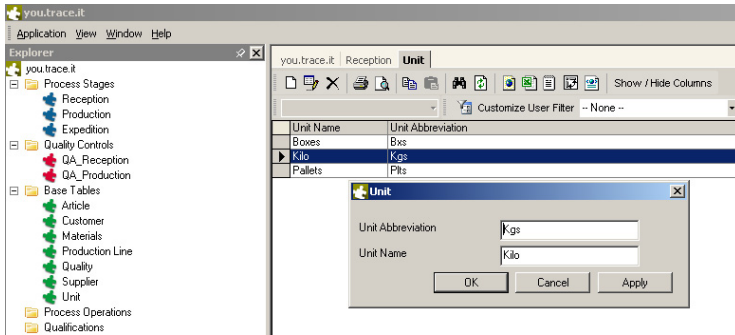
The product line consists of two articles, article 1 and 2. To produce those articles, three sorts of raw materials are bought from three different suppliers. Each delivery is registered by keeping a lot ID record for that batch of raw materials in the reception process stage.

You see the grid listing the reception lot ID records in the database and the form to register new deliveries of raw materials:

The screenshot shows the 'you.trace.it Reception' window. It features a toolbar with icons for navigation and a menu bar with options like 'Reception', 'Customize User Filter', and 'Quality Reports'. Below the menu is a table listing reception records. The table has columns for Materials, Lot ID, Begin Time, Lot Quantity, Unit, Unit Abbreviation, and Supplier. The records are grouped by material type: Raw materials 1, Raw materials 2, and Raw materials 3. A 'Reception' dialog box is open on the right, allowing users to enter details for a new lot ID record, including Lot ID, Begin Time, End Time, Lot Quantity, Materials, Unit Abbreviation, and Supplier.

Materials	Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Supplier
Raw materials 1	REC1111600001	26/04/2011 17:00:58	1000	Kgs		Supplier 1
Raw materials 1	REC1111600002	26/04/2011 17:10:31	2000	Kgs		Supplier 1
Raw materials 1	REC1111600007	26/04/2011 17:13:11	1000	Kgs		Supplier 1
Raw materials 1	REC1111600011	26/04/2011 17:18:07	2000	Kgs		Supplier 1
Raw materials 2	REC1111600003	26/04/2011 17:11:25	1500	Kgs		Supplier 2
Raw materials 2	REC1111600005	26/04/2011 17:12:21	1500	Kgs		Supplier 2
Raw materials 2	REC1111600008	26/04/2011 17:13:29	3000	Kgs		Supplier 2
Raw materials 3	REC1111600004	26/04/2011 17:11:56	2000	Kgs		Supplier 3
Raw materials 3	REC1111600006	26/04/2011 17:12:40	1500	Kgs		Supplier 3
Raw materials 3	REC1111600009	26/04/2011 17:13:51	1500	Kgs		Supplier 3
Raw materials 3	REC1111600010	26/04/2011 17:14:13	1000	Kgs		Supplier 3

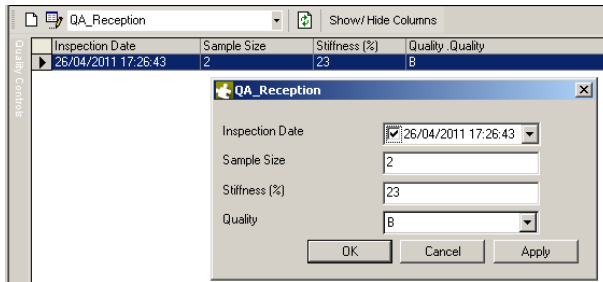
The attributes Unit Abbreviation, Materials and Supplier must be selected from a scroll list. The data displayed in the scroll lists is retrieved from the corresponding base tables Unit, Materials and Supplier:



Quality records

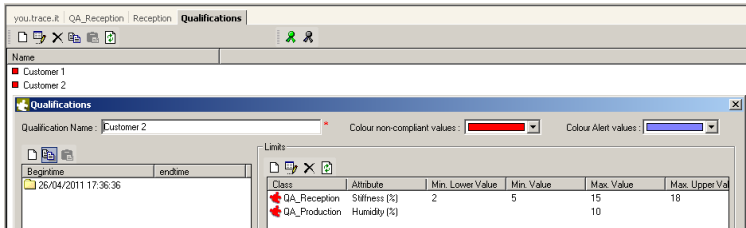
To monitor product quality, we take a sample of each incoming delivery of raw materials. The stiffness of the materials is tested and a quality label is assigned to the batch.

Again, you see the grid listing the quality record(s) for the selected lot ID and the form to insert the test results in the database:

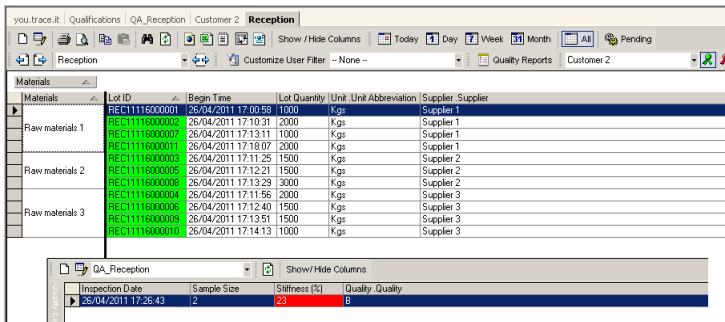


Qualifications

Customer quality requirements with regard to the used raw materials can be stored in qualifications. Our customers impose different limits regarding the stiffness percentage of used raw materials. This is the qualification for customer 2:



When you activate that qualification to check whether quality records, and consequently lot IDs, comply with the requirements, non-compliant values are highlighted:



Since the stiffness value in the example above amounts to 23 %, and the maximum upper limit is 18 %, the value is highlighted in the quality record. Compliant or non-compliant lot IDs are shown by clicking or in the toolbar.

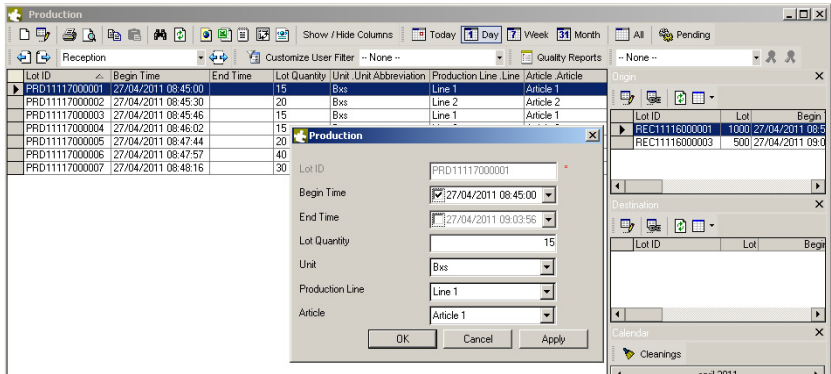
Production (of articles)

Lot ID records

The composition of raw materials for both articles is explained in the table below:

	Raw Material 1	Raw Material 2	Raw Material 3
Article 1 (15 boxes)	1000 kgs	500 kgs	-
Article 2 (20 boxes)	-	500 kgs	1500 kgs

A production lot ID record is inserted in the database for every operation of combining raw materials to produce articles. You see the grid listing the production lot ID records in the database and the form to register new ones:

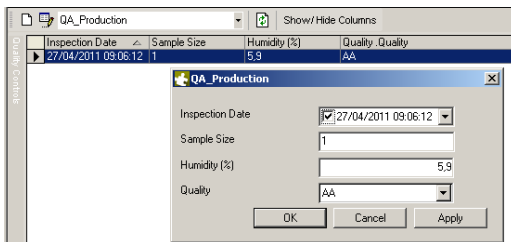



The Origin panel lists the reception lot ID records (raw materials) that were used to produce the selected production lot ID: 1000 kgs of raw material 1 and 500 kgs of raw material 2 yield 15 boxes of article 1.

Quality records

To monitor product quality, we take a sample of each batch of produced articles. The humidity of the articles is measured and a quality label is assigned to the batch.

Again, you see the grid listing the quality record(s) for the selected lot ID and the form to insert the test results in the database:



 The symbol to separate decimals in numeric fields depends on the regional options, period or comma. Note that commas as separators can only be entered using the alphanumeric keyboard!

The qualification for customer 2 contains a limit for the humidity value of the articles, which may not exceed 10 %. Since 5.9 % complies with the limit and results in a compliant production lot ID:

Lot ID	Begin Time	End Time	Lot Quantity	Unit	Unit Abbreviation	Production Line	Line	Article	Article
PRD11117000001	27/04/2011 08:45:00		15	Bxs		Line 1		Article 1	
PRD11117000002	27/04/2011 08:45:30		20	Bxs		Line 2		Article 2	
PRD11117000003	27/04/2011 08:45:46		15	Bxs		Line 1		Article 1	
PRD11117000004	27/04/2011 08:46:02		15	Bxs		Line 3		Article 3	
PRD11117000005	27/04/2011 08:47:44		20	Bxs		Line 2		Article 2	
PRD11117000006	27/04/2011 08:47:57		40	Bxs		Line 1		Article 1	
PRD11117000007	27/04/2011 08:48:16		30	Bxs		Line 3		Article 3	

Expedition (of pallets)

Articles are shipped differently depending on the type:

	Boxes / Pallet
Article 1	30 boxes
Article 2	40 boxes

An expedition lot ID record is inserted in the database for every shipment of articles of a particular type to one customer. You see the grid listing the lot ID records in the database and the form to register new ones:

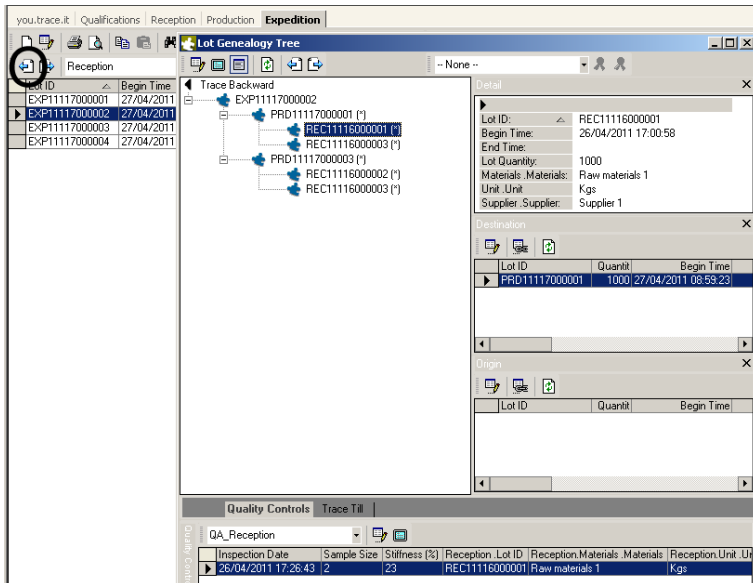
Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Article	Article	Customer	Customer
EXP11117000001	27/04/2011 09:22:22	1	Pkts		Article 3		Customer 3	
EXP11117000002	27/04/2011 09:23:35	1	Pkts		Article 1		Customer 1	
EXP11117000003	27/04/2011 09:23:52	2	Pkts		Article 2		Customer 2	
EXP11117000004	27/04/2011 09:24:05	1						

Lot ID	Begin Time	End Time	Lot Quantity	Unit	Article	Customer
EXP11117000002	27/04/2011 09:23:35	27/04/2011 10:56:03	1	Pkts	Article 1	Customer 1

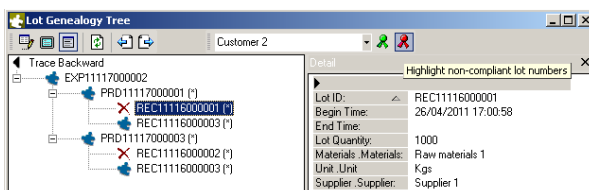
The Origin panel lists the production lot IDs that were palletised. Article 1 is palletised per 30 boxes, which requires two batches of 15 boxes.

Tracking & Tracing

To retrieve the path of a lot ID through the intermediate stages of the production flow, you use the track & trace commands. To trace the origin, i.e. the used raw materials, of expedition lot ID 'EXP11117000002', click the trace back button in the Track & Trace toolbar:



Expand the Lot Genealogy Tree to display the related lot IDs in consecutive process stages. Activate qualifications to learn whether lot IDs comply with quality requirements:

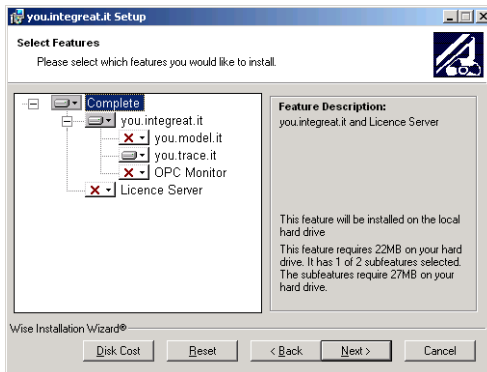


Installation

Installing you.trace.it

Proceed as follows to install you.trace.it:

- 1 Close all other applications.
- 2 Run setup.exe from the you.trace.it CD-ROM.
- or -
Click **Install you.trace.it** in the Autorun window.
The you.trace.it installation wizard appears.
- 3 Click **Next >**.
- 4 Choose to accept the licence agreement and click **Next >**.
- 5 Enter user name and organisation, then click **Next >**.
- 6 Browse to the location where you.trace.it must be installed, then click **Next >**.
- 7 Select **Custom**, click you.trace.it and select 'Will be installed on local hard drive'.
Select 'Entire feature will be unavailable' for programs you do not wish to install.



- 1 Click **Next >** twice to begin the installation.
Follow on-screen instructions.

Installing the licence server

What is it

The usage of you.trace.it is protected with licence keys. The licence key must be connected to the parallel/USB port of a workstation in your LAN. Without licence key, you can run you.trace.it for 30 minutes only. When you have a local licence key, you do not need to install the Licence Server. In case of a network licence key, the Licence Server is required to monitor licence usage in the LAN or to upgrade the key resources (clients & attributes).

Installation

Proceed as follows to install the licence server for you.trace.it:

- 1 Close all other applications and make sure all hardware keys are disconnected from LPT1.
- 2 Run setup.exe from the you.trace.it CD-ROM.
- 3 Click **Next >**.
- 4 Choose to accept the licence agreement and click **Next >**.
- 5 Enter user name and organisation, then click **Next >**.
- 6 Browse to the location where the features must be installed, then click **Next >**.
- 7 Select **Custom** and click **Next >**.
- 8 Click **Licence Server** and select 'Will be installed on local hard drive'.
- 9 Click **Next >** twice to begin the installation.

When the installation of the licence server is completed, the setup for the Sentinel System Driver is launched. The driver allows for communication between the licence key (connected to LPT1) and you.trace.it.

- 1 Choose to accept the licence agreement and click **Next >**.
- 2 Select **Custom** and click **Next >**. Then, click **Parallel System Driver** and select 'This feature will be installed on local hard drive'. To exclude the USB driver from the installation, click **USB System Driver** and select 'This feature will not be available'. Click **Next >**.
- 3 Click **Install** to begin the installation.
Follow on-screen instructions.
- 4 Click **Finish**.
Installation directory is Program Files\Rainbow Technologies\Sentinel system driver.
- 5 Connect the licence key to the parallel/USB port of the server.


Installing SQL components

Introduction

you.trace.it requires an instance of SQL server installed locally or in your LAN. Check whether you must install SQL components from the you.trace.it CD-ROM.


If ...	Then ...
SQL server 2000 or MSDE is available locally	do not install MSDE or SQL-DMO.
SQL server 2000 or MSDE is available in the network	install SQL-DMO on the remote systems, which must connect to the SQL server.
No SQL server or MSDE is available	install MSDE on a local system or server install SQL-DMO on the systems, which must connect to the MSDE.

Install SQL Server Desktop Engine (MSDE)


 MSDE will not be installed on a computer that has an instance of SQL server running.

The SQL Server Desktop Engine (MSDE) setup also includes SQL Server Client Objects (SQL-DMO). MSDE is a low-end alternative to SQL server and can be installed on a workstation or server. However, you must install SQL- DMO on all systems that need access to the MSDE. Proceed as follows to install MSDE:

- 1 In the Autorun window, click **Install SQL Server Components**.
- 2 Select **Install Microsoft SQL Server Desktop Engine** and click **Install**.

 SQL Server Security is applied when installing MSDE.
You need an 'sa account' without password to access MSDE databases.

Install SQL Server Client Objects (SQL-DMO)

 SQL-DMO will not be installed on a computer that has an instance of SQL server running.

SQL Server Client Objects (SQL-DMO) must be installed on systems which must connect to a remote database (SQL Server or MSDE). Proceed as follows to install SQL-DMO:

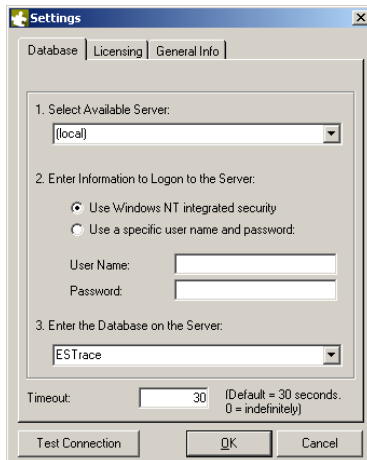
- 1 In the Autorun window, click **Install SQL Server Components**.
- 2 Select **Install Microsoft SQL Server Client Objects** and click **Install**.
- 3 Click **Next >** to begin the installation.
Follow on-screen instructions.
- 4 Click **Finish** and restart Windows when requested.

Start & log on

When you.trace.it is launched, the program automatically connects to the database to which it was connected when the program was shut down. Proceed as follows to connect to a database and log on:

- 1 Launch you.trace.it by choosing Programs > you.integreat.it > you.trace.it in the Start menu.

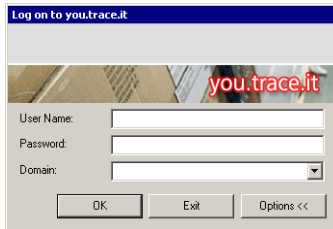
When used for the first time or when the database is offline, the database connection window appears on start- up:



If you want to connect to another database when you.trace.it is started, point to **Application>Settings**.

- 2 Select the SQL server in the network or type '(local)' when the user database is stored in an instance of SQL server run by the same computer that runs you.trace.it.
- 3 Select the login method for the SQL server: Windows NT integrated security (user name and password to connect your PC to the LAN is used) or specific user name and password for the SQL server ('sa' account).

- 4 Select a database and click **OK** to connect.
The log on window pops up:



- 5 Enter the user name and password of your personal network account.
Also specify the Windows domain, if required.



Depending on the user rights assigned to the logon account, actions can be performed and classes can be accessed. Contact your system administrator if you do not have sufficient user rights. Refer to “About user rights” on page 81 for more details on assigning user rights in you.trace.it.

Work area

The you.trace.it work area is shown here:

The screenshot displays the you.trace.it application window. The interface includes a menu bar (Application, View, Window, Help), a toolbar with icons for file operations and navigation, and a main workspace divided into several panels:

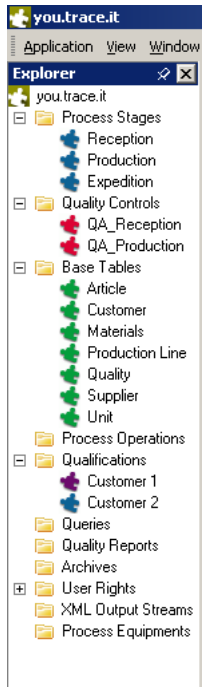
- Explorer (6):** A tree view on the left side showing a hierarchy of database tables such as Process Steps, Reception, Production, and QA Production.
- Grid (2):** A central table displaying production records with columns: Lot ID, Begin Time, End Time, Lot Quantity, Unit, Unit Abbreviation, Production Line, Line, and Article. The selected row is PRD1111700005.
- Calendar (3):** A calendar view for April 2011, showing dates and a 'Sun' column.
- Origin and Destination Panels (4):** Panels on the right side showing Lot ID and Lot information for parent and child records.
- Secondary Grid (5):** A smaller table at the bottom showing quality records with columns: Inspection Date, Production Line, Production Unit, Unit Abbreviation, Production Line, Line, Production Article, Article, Sample Size, and Humidity. The selected row shows an inspection on 27/04/2011 at 10:51:33.
- Toolbars (1):** Multiple toolbars at the top and bottom of the main workspace.

Numbered items are explained below:

- 1 Toolbars for the most common actions in you.trace.it.
- 2 The grid displays the records stored in the corresponding database table.
- 3 The calendar allows to search data records by date.
- 4 The origin and destination panels display parent and/or child lot ID records and used quantities.
- 5 The secondary grid displays quality records linked to the selected lot ID record.
- 6 The folder list provides a tree view from where you can access all database tables.
- 7 All the database tables opened in the grid (1) are available in different tabs.

Navigation

you.trace.it is intended to manage traceability and quality records in a database. The database contains tables of different kinds and you can open them from the folder list:



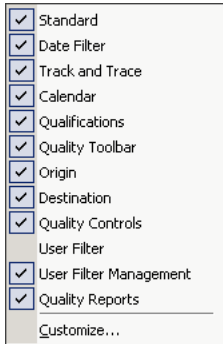
Groups	See
Process Stages	CHAPTER 4
Quality Controls	CHAPTER 5
Base Tables	CHAPTER 6
Qualifications	CHAPTER 5
Queries	CHAPTER 7
User Rights	CHAPTER 8

Toolbars

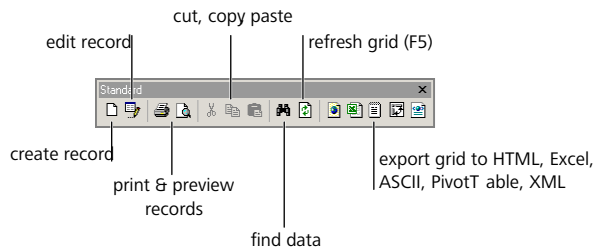
Show or hide toolbars by right-clicking in the menu area (or **View>Toolbars**).

You can also show or hide the calendar (3), the origin and destination panels (4) and the quality grid (5).

The availability of toolbars depends on the selected type of table.

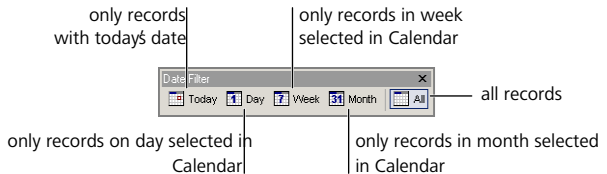


Standard toolbar



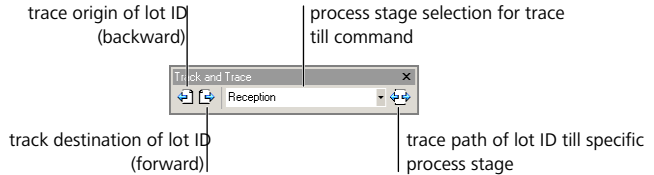
Date Filter toolbar

The Date Filter toolbar is used in combination with the Calendar to filter records in the grid by date (see page 24).



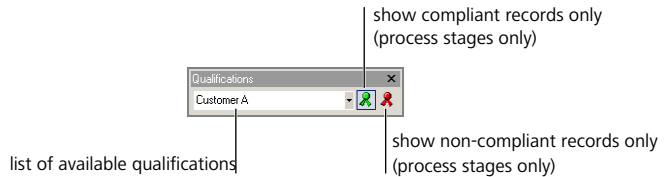
Track & Trace toolbar

The Track & Trace toolbar is available for tables containing lot IDs. You can track and trace the path of a unit or batch through the intermediate stages of the production flow (see page 46).



Qualifications toolbar

The Qualifications toolbar becomes available when you select tables that contain records with attributes for which limits have been defined (see page 59).



Quality toolbar


The Quality toolbar is used to insert or edit quality records (see page 54).



Language settings

The default interface language for you.trace.it is English. If the database, to which you are connected, supports multiple languages, you can change the user interface language in the **View** menu.

Point to **Select Languages**, then click the language you prefer.

 If interface items seem to be missing or appear in another language, contact your integrator. The corresponding language files (*.igl) may need to be adjusted and the database must be upgraded!

CHAPTER 3

Record & Grid Basics

Record & Grid Basics teaches you how to filter, find, search, sort and format lot ID and quality records.

Filtering records

You can filter grids to limit the displayed number of records:

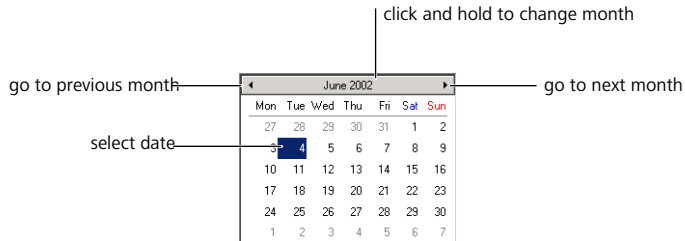
- by date
- by contents.

Filter records by date

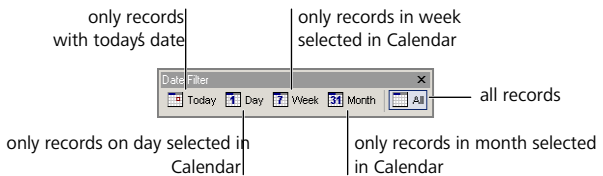
The Date Filter toolbar is used in combination with the Calendar to filter records by date.


Proceed as follows to filter data records by date, week or month:

- 1 Select a date, week or month in the calendar:



- 1 Select the filter method in the Date Filter toolbar:



-  If the calendar is not displayed in the correct language, change the locale of your PC. Click the Start menu and go to **Settings > Control Panel > Regional Options** and select your locale on the General tab.

Filter records by contents

Content filters allow you to specify data, according to which the grid is filtered. You can use the filter bar (simple queries) or an advanced filter (complex queries).

Filter bar

Proceed as follows to activate and use the filter bar:

- 1 Right-click the grid and point to **Extra > Filter > Filter bar**.
An empty row appears under the header:

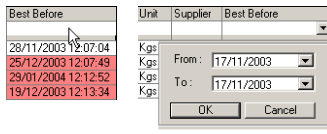
	Lot ID	Begin Time	Lot Quantity	Materials .Materials	Unit .Unit Abbreviation	Supplier .Supplier
▶	REC1111600001	26/04/2011 17:00:58	1000	Raw materials 1	Kgs	Supplier 1
	REC1111600002	26/04/2011 17:10:31	2000	Raw materials 1	Kgs	Supplier 1
	REC1111600003	26/04/2011 17:11:25	1500	Raw materials 2	Kgs	Supplier 2
	REC1111600004	26/04/2011 17:11:56	2000	Raw materials 3	Kgs	Supplier 3
	REC1111600005	26/04/2011 17:12:21	1500	Raw materials 2	Kgs	Supplier 2
	REC1111600006	26/04/2011 17:12:40	1500	Raw materials 3	Kgs	Supplier 3
	REC1111600007	26/04/2011 17:13:11	1000	Raw materials 1	Kgs	Supplier 1
	REC1111600008	26/04/2011 17:13:29	3000	Raw materials 2	Kgs	Supplier 2
	REC1111600009	26/04/2011 17:13:51	1500	Raw materials 3	Kgs	Supplier 3
	REC1111600010	26/04/2011 17:14:13	1000	Raw materials 3	Kgs	Supplier 3
	REC1111600011	26/04/2011 17:18:07	2000	Raw materials 1	Kgs	Supplier 1

- 2 Place the cursor in an empty cell and enter data.
The grid only displays the records that match the data:

✓	Lot ID	Begin Time	Lot Quantity	Materials .Materials	Unit .Unit Abbreviation	Supplier .Supplier
						Supplier 1
▶	REC1111600001	26/04/2011 17:00:58	1000	Raw materials 1	Kgs	Supplier 1
	REC1111600002	26/04/2011 17:10:31	2000	Raw materials 1	Kgs	Supplier 1
	REC1111600007	26/04/2011 17:13:11	1000	Raw materials 1	Kgs	Supplier 1
	REC1111600011	26/04/2011 17:18:07	2000	Raw materials 1	Kgs	Supplier 1

- 3 To hide the filter bar, right-click the table, and select **Extra > Filter > Filter bar**.

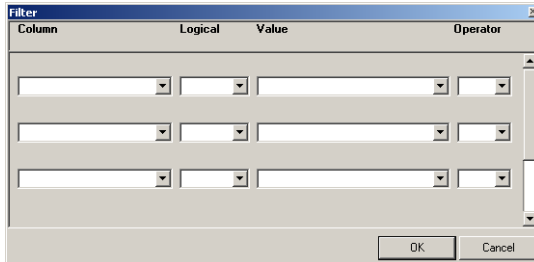
Example: You only want to view the records of specific date.
Activate the filter bar, put the cursor in the empty cell in the column.
Click the arrow to specify the date or period (a 'From' and 'To' date).



Advanced filter

Proceed as follows to use the advanced filter:

- 1 Right-click the grid and point to **Extra > Filter > Advanced Filter**:

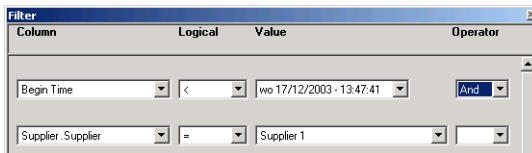


- 2 Select the column to be filtered.
- 3 Select a logical operator (>, <, =, <>) and enter a value.
- 4 Select 'and' or 'or' in the Operator column, if you want to add another search string.
- 5 Click **OK** to filter the grid:

Lot.ID	Begin Time	Lot Quantity	Materials .Materials	Unit .Unit Abbreviation	Supplier .Supplier
REC11116000011	26/04/2011 17:18:07	2000	Raw materials 1	Kgs	Supplier 1
REC11116000007	26/04/2011 17:13:11	1000	Raw materials 1	Kgs	Supplier 1
REC11116000002	26/04/2011 17:10:31	2000	Raw materials 1	Kgs	Supplier 1
REC11116000001	26/04/2011 17:00:58	1000	Raw materials 1	Kgs	Supplier 1

- 6 To reset filters, right-click the grid and point to **Extra>Filter>Reset All Filters**.

Example: You only want to view the records registered before the 17th of December 2003 by Supplier 1. Specify that the value in the Begin Time column must be '<' than 17/12/2003. Select 'And' in the Operator column and specify that the Supplier column must contain Supplier 1.




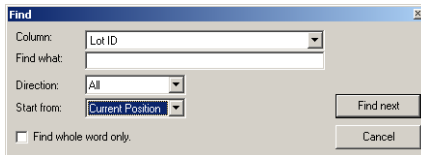
Operators: Most operators are obvious, though: '<' means different from; 'Between' allows to specify a range and 'Like' allows to specify parts of fields (e.g. Sup* displays records beginning with 'Sup').


Finding data in records

If you are looking for specific data in records, use the Find function.

Proceed as follows:

- 1 Click  in the toolbar:



- 1 Select the column to be searched.
- 2 Enter the data to be found.
- 3 Specify the search direction and the start position, if needed.
 The start position relates to the place in the table where you want to begin your search (current position, begin or end). The search direction refers to the direction the table will be searched (up, down or all).
- 4 Tick **Find whole word only** to search for the whole word (parts are ignored).
- 5 Click **Find next** to find matches.

Sorting records

Sort records (easy)

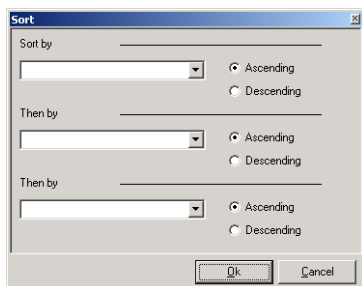
Proceed as follows to sort records by means of a head click:

- 1 Right-click the grid and point to **Extra > Sort > Sort on Head Click**.
- 2 Click the header of the column according to which you want to sort the grid.
- 3 Click again to restore the original order.

Sort records (advanced)

Proceed as follows to use the advanced sorting method:

- 1 Right-click the grid and point to **Extra > Sort > Advanced Sort**.



- 2 Select a primary sort key in the Sort By scroll list and select Ascending or Descending. The sort key is the column, according to which you want to sort the grid.
- 3 To specify a second or third sort key, select a sort key in the second or third Then By area.
- 4 Click **OK**.

Formatting grids

If you adjust the way records are displayed in a grid, your preferences are saved in layout files in the following directory: Documents and Settings\[Your Account Name]\Application Data\you.integreat.it\Trace_It_Layout.

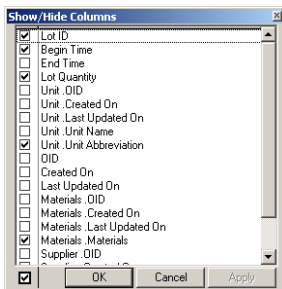
To restore default settings, delete the files. You can customise the grid by:


- showing / hiding columns
- changing the order of columns
- changing the table view
- changing grid properties (colour, font, etc.).

Show / hide columns


To hide columns in the grid, proceed as follows:

- 1 Right-click the grid and point to **Extra > Show / Hide Columns** or click the **Show / Hide Columns** button on the **Standard** toolbar.



 This window not only lists the columns in the table itself, but also the columns in the linked base tables.

- 2 Clear the check boxes to hide the corresponding columns.

 To hide all columns, clear the check box in the bottom-left corner.

- 3 Drag and drop column names to change the order of appearance.
- 4 Click OK.

Different table views

The way the grid is displayed can be changed.
Right-click the grid and point to Extra > Table View.

- Normal View:

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
REC03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000004	10/12/2003 14:11:16	2000	Kgs		Raw materials 3		Supplier 3	
REC03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000006	10/12/2003 14:12:08	1500	Kgs		Raw materials 3		Supplier 3	
REC03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000008	10/12/2003 14:12:34	3000	Kgs		Raw materials 2		Supplier 2	
REC03344000009	10/12/2003 14:12:44	1500	Kgs		Raw materials 3		Supplier 3	
REC03344000010	10/12/2003 14:47:16	1000	Kgs		Raw materials 3		Supplier 3	

- Group View:

Drag a column header here to group by that column

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
REC03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000011	10/12/2003 14:48:27	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000008	10/12/2003 14:12:34	3000	Kgs		Raw materials 2		Supplier 2	

area to group rows by the contents in a particular column, see page 66

Supplier	Supplier	Materials	Materials	Lot ID	Begin Time	Lot Quantity	Unit	Unit
Supplier 1		Raw materials 1		REC03344000001	10/12/2003 11:46:55	1000	Kgs	
Supplier 1		Raw materials 1		REC03344000002	10/12/2003 11:55:55	2000	Kgs	
Supplier 1		Raw materials 1		REC03344000007	10/12/2003 14:12:26	1000	Kgs	
Supplier 1		Raw materials 1		REC03344000011	10/12/2003 14:48:27	2000	Kgs	
Supplier 2		Raw materials 2		REC03344000003	10/12/2003 13:46:17	1500	Kgs	
Supplier 2		Raw materials 2		REC03344000005	10/12/2003 14:11:28	1500	Kgs	
Supplier 2		Raw materials 2		REC03344000008	10/12/2003 14:12:34	3000	Kgs	

- Inverted / Form View (columns become rows and vice versa):

Lot ID	REC03344000001	REC03344000002	REC03344000007	REC03344000011
Begin Time	10/12/2003 11:46:55	10/12/2003 11:55:55	10/12/2003 14:12:26	10/12/2003 14:48:27
Lot Quantity	1000	2000	1000	2000
Unit	Kgs	Kgs	Kgs	Kgs
Unit Abbreviation				
Materials	Raw materials 1	Raw materials 1	Raw materials 1	Raw materials 1
Materials				
Supplier	Supplier 1	Supplier 1	Supplier 1	Supplier 1
Supplier				

Lot ID:	REC03344000001
Begin Time:	10/12/2003 11:46:55
Lot Quantity:	1000
Unit Abbreviation:	Kgs
Materials:	Raw materials 1
Supplier:	Supplier 1

view next record using horizontal scrollbar

Change column order

You can drag columns to the left or right in the grid.
Proceed as follows to change the order of columns in grid:

- 1 Hold Shift and click the headers of the column(s) you want to move.

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
▶ RE C03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
RE C03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
RE C03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
RE C03344000004	10/12/2003 14:11:16	2000	Kgs		Raw materials 3		Supplier 3	
RE C03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
RE C03344000006	10/12/2003 14:12:08	1500	Kgs		Raw materials 3		Supplier 3	
RE C03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	

- 2 Drag and drop the column(s) to another location in the header.

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
▶ RE C03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
RE C03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
RE C03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
RE C03344000004	10/12/2003 14:11:16	2000	Kgs		Raw materials 3		Supplier 3	
RE C03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
RE C03344000006	10/12/2003 14:12:08	1500	Kgs		Raw materials 3		Supplier 3	
RE C03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	

The column order is changed:

Lot ID	Materials	Materials	Supplier	Supplier	Begin Time	Lot Quantity	Unit	Unit Abbreviation
▶ RE C03344000001	Raw materials 1		Supplier 1		10/12/2003 11:46:55	1000	Kgs	
RE C03344000002	Raw materials 1		Supplier 1		10/12/2003 11:55:55	2000	Kgs	
RE C03344000003	Raw materials 2		Supplier 2		10/12/2003 13:46:17	1500	Kgs	
RE C03344000004	Raw materials 3		Supplier 3		10/12/2003 14:11:16	2000	Kgs	
RE C03344000005	Raw materials 2		Supplier 2		10/12/2003 14:11:28	1500	Kgs	
RE C03344000006	Raw materials 3		Supplier 3		10/12/2003 14:12:08	1500	Kgs	
RE C03344000007	Raw materials 1		Supplier 1		10/12/2003 14:12:26	1000	Kgs	

Group rows by contents

The Group View allows to group rows according to their contents. You select the column header and drag it into the area above the grid. Proceed as follows:

- 1 Right-click the grid and point to **Extra > Table View > Group View**.
- 2 Select the column by clicking its header.

Drag a column header here to group by that column

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
REC03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000011	10/12/2003 14:48:27	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000008	10/12/2003 14:12:34	3000	Kgs		Raw materials 2		Supplier 2	

- 3 Drag and drop the column header into the group area above.

Supplier, Supplier

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Supplier
REC03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1		Supplier 1	
REC03344000011	10/12/2003 14:48:27	2000	Kgs		Raw materials 1		Supplier 1	
REC03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2		Supplier 2	
REC03344000008	10/12/2003 14:12:34	3000	Kgs		Raw materials 2		Supplier 2	

The grid is grouped according to the contents of that column:

Supplier, Supplier	Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Materials
Supplier 1	REC03344000001	10/12/2003 11:46:55	1000	Kgs		Raw materials 1	
	REC03344000002	10/12/2003 11:55:55	2000	Kgs		Raw materials 1	
	REC03344000007	10/12/2003 14:12:26	1000	Kgs		Raw materials 1	
	REC03344000011	10/12/2003 14:48:27	2000	Kgs		Raw materials 1	
Supplier 2	REC03344000003	10/12/2003 13:46:17	1500	Kgs		Raw materials 2	
	REC03344000005	10/12/2003 14:11:28	1500	Kgs		Raw materials 2	
	REC03344000008	10/12/2003 14:12:34	3000	Kgs		Raw materials 2	

- 4 Drag and drop other column headers.

Supplier, Supplier	Materials	Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation
Supplier 1	Raw materials 1	REC03344000001	10/12/2003 11:46:55	1000	Kgs	
		REC03344000002	10/12/2003 11:55:55	2000	Kgs	
		REC03344000007	10/12/2003 14:12:26	1000	Kgs	
		REC03344000011	10/12/2003 14:48:27	2000	Kgs	
Supplier 2	Raw materials 2	REC03344000003	10/12/2003 13:46:17	1500	Kgs	
		REC03344000005	10/12/2003 14:11:28	1500	Kgs	
		REC03344000008	10/12/2003 14:12:34	3000	Kgs	

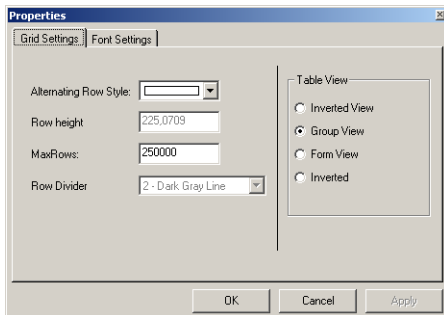
- 5 Restore the grid by dragging and dropping column headers in the grid.

Change grid properties

Right-click the grid and point to Extra>Settings to change grid settings:

- Alternating row style
- Row height
- Grid ruling colour
- Table view
- Text style.

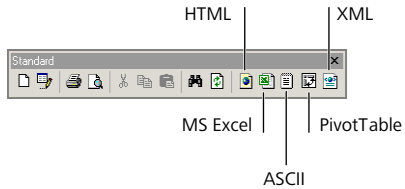
This is the tab where you can adjust grid settings:



- 1 Alternating row style allows to display odd and even rows in a different colour. Select the colour for the even rows from the scroll list. Turn off by selecting white colour!
- 2 Row height specifies the height of one record (in twips).
- 3 MaxRows specifies the maximum number of rows in a table.
- 4 Row divider specifies the colour of the row and column ruling in grids.
- 5 Table view allows to change the way the grid is displayed. See page 30.
- 6 Click the Font Settings tab to change the font, size and effects for text in the data records.

Exporting records

To export the records in a grid, click the corresponding button in the Standard toolbar:



Grids can be exported to the following formats:

Format	Description
HTML	*.htm file to display data in a web browser
XML	*.xml file to interchange structured data over the internet
ASCII	*.txt file to present data in basic text format
MS Excel	*.xls file to analyse and compare data
PivotTable	format to generate graphical, interactive reports for data analysis

CHAPTER 4

Process Stages & Lot IDs

This chapter informs you on process stages and lot ID records. Every lot ID relates to a particular operation in the production process. What are lot IDs, how do you insert lot ID records and link related ones in consecutive process stages?

You will also learn how to trace the origin or track the destination of lot IDs through the intermediate process stages.

Introduction

Process stages

Primarily, you.trace.it is meant to insert lot ID records in the database. Every record uniquely identifies a unit or batch as it is being transformed in a production flow. Process stages represent the major operations in that production flow.

For each unit or batch undergoing such operation, a lot ID record is inserted into the database, along with relevant process data. The practical case used in this user's guide is explained briefly in the table below:

Process stages	Reception	Production	Expedition
Operation	Registration of incoming raw materials	Registration of every production run to turn raw materials into articles	Registration of every shipment of articles to customers
Logical sequence	1	2	3
Unit	Bulk (kgs)	Boxes (Bxs)	Pallets (Plts)
Lot ID prefix	REC	PRD	EXP
Linked quality control	QA_Reception	QA_Production	None

Record registration

For each unit or batch in a process stage, a lot ID record is inserted into the database. It tells you all about the features of a unit or batch at that stage of production. See page 39.

Record linking

Related lot ID records for a unit or batch in consecutive process stages are linked to one another in the database, which makes it possible to follow and trace the path of articles through all the intermediate steps of a production flow. See page 40.

Process stage grids

Lot IDs are organised per operation in a production flow, i. e. per process stage. You can consult the inserted records for a process stage by opening its grid, which displays the contents of the corresponding table in the database. An example of a process stage grid is shown below:

The screenshot displays the you.trace.it application window. The Explorer pane on the left shows a tree view of process stages, with 'Production' selected and circled with a '1'. The main window shows a grid of production records with columns: Lot ID, Begin Time, End Time, Lot Quantity, Unit, Unit Abbreviation, Production Line, Line, and Article. The record for Lot ID PRD1111700005 is selected and circled with a '2'. Below the grid, the 'Origin' and 'Destination' panels are visible, with the 'Origin' panel showing a grid of quality records for the selected lot ID, circled with a '3'. The 'Destination' panel shows a grid of parent and child lot ID records, circled with a '4'. The bottom status bar shows the selected record details: Impression Date: 27/04/2011 10:51:33, Production Line: PRD1111700005, Unit: Bxs, Production Line Line: Line 2, Production Article: Article 2, Sample Size: 2, Humidity: 73.

- 1 Overview of the available process stages.
- 2 Grid listing the inserted lot ID records for the selected process stage.
- 3 Grid listing the inserted quality records for the selected lot ID record.
Only available for process stages with related quality control.
- 4 Origin and destination panels display parent and/or child lot ID records and used quantities.

Lot ID records

Sometimes you.trace.it is configured for automatic data exchange with automated production equipment. In such cases, lot ID records may be inserted in the database and linked to related ones in consecutive process stages automatically. However, lot ID records can also be inserted and linked manually.

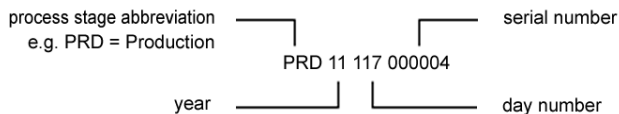
Lot IDs & attributes

A lot ID record is kept for every unit or batch undergoing an operation in a process stage. This record lists the attributes of the batch, which is the information with regard to the operation performed in that stage of the production flow. An example of lot ID records:

Lot ID	Begin Time	Lot Quantity	Unit .Unit Abbreviation	Production Line .Line	Article .Article
PRD11117000001	27/04/2011 08:45:00	15	Bxs	Line 1	Article 1
PRD11117000002	27/04/2011 08:45:30	20	Bxs	Line 2	Article 2
PRD11117000003	27/04/2011 08:45:46	15	Bxs	Line 1	Article 1
PRD11117000004	27/04/2011 08:46:02	15	Bxs	Line 3	Article 3
PRD11117000005	27/04/2011 08:47:44	20	Bxs	Line 2	Article 2
PRD11117000006	27/04/2011 08:47:57	40	Bxs	Line 1	Article 1
PRD11117000007	27/04/2011 08:48:16	30	Bxs	Line 3	Article 3

When a record is inserted, you.trace.it assigns a unique lot ID that uniquely identifies the unit or batch.

The format of lot IDs is identical for all process stages:



The process stage abbreviation is a three-letter indicator of the process stage to which the lot ID record belongs. Some examples:


- REC for reception
- PRD for production
- WAR for warehousing
- EXP for expedition.

The other bits of information stored in the lot ID record are the attributes or features of the unit or batch in that process stage: registration time of the lot ID, produced quantity, unit of measurement, the line on which article was manufactured, type of produced article, etc.

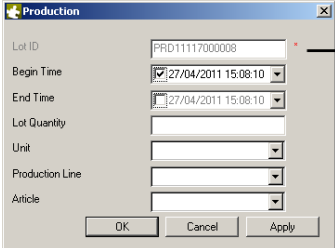
Insert lot ID records

In order to insert lot ID records for process stages, you must input the information in you.trace.it.

Proceed as follows to insert lot ID records for units or batches:



- 1 Open the **Process Stages** folder in the folder list.
- 2 Click the process stage to which you want to add a lot ID record.
- 3 Click  in the toolbar.

The form for that process stage appears:



lot ID assigned by you.trace.it

- 4 Specify begin and/or end times, which indicate when the operation for that unit or batch was started or finished in the corresponding process stage.
- 5 Enter data or select it from the scroll lists.
Required information is indicated by red asterisks.
- 6 Click OK to insert the lot ID record in the database.

 To edit the lot ID record later, select it and click  in the toolbar.

Link lot IDs

Why

When raw materials are transformed into articles, a lot ID record is stored in the database for every operation the raw materials undergo. If you want to learn about the destination of the raw materials or the origin of produced articles, the related lot ID records in the consecutive process stages must be linked to each other.

Example

When raw materials are taken into production, a PRD lot ID is inserted in the database and linked to the reception lot ID record(s) from which raw materials were taken to produce the PRD lot ID.

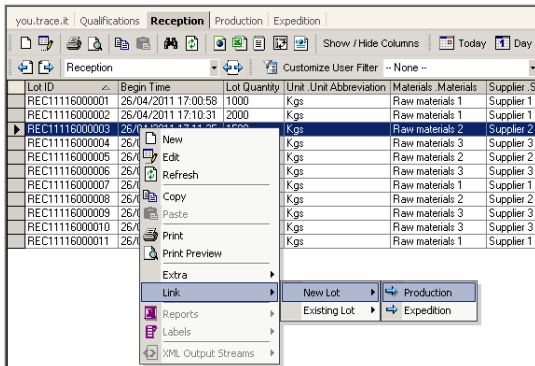
You can link lot IDs in two different ways:

If ...	Then ...	See
the lot ID does not yet exist in the target process stage	create lot ID and link it to the related lot ID(s) in the preceding process stage	page 41
the lot ID already exists in the target process stage	drag & drop related lot IDs to establish link	page 43

Create new lot ID and link

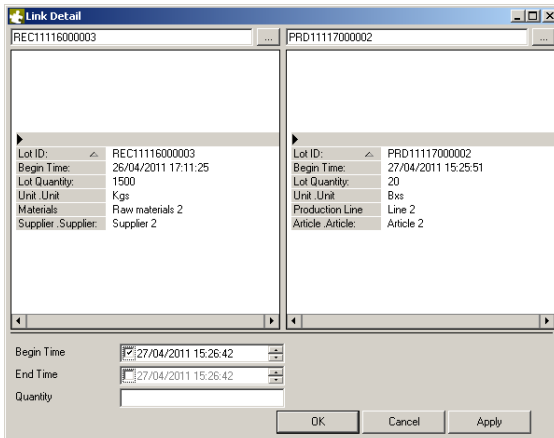
Proceed as follows to insert new lot IDs in target process stages while linking:

- 1 Right-click the lot ID record and point to **Link**.
Hold the **Ctrl** key to select multiple records.
- 2 Select **New Lot** and point to the target process stage:



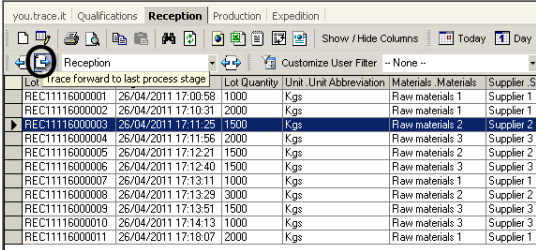
- 3 The form for the target process stage appears. Complete the fields and click **OK**.

The Quantity Specification window pops up:



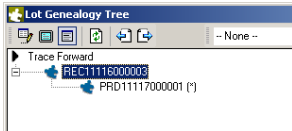
- 4 In the **Quantity** box, enter the number of units from the source lot ID that are used in the target lot ID. Click **OK**.

5 Test the link by performing trace forward on source lot ID:



Lot	Quantity	Unit	Unit Abbreviation	Materials	Materials	Supplier	Si
REC11116000001	26/04/2011 17:00:58	1000	Kgs	Raw materials 1	Supplier 1		
REC11116000002	26/04/2011 17:10:31	2000	Kgs	Raw materials 1	Supplier 1		
▶ REC11116000003	26/04/2011 17:11:25	1500	Kgs	Raw materials 2	Supplier 2		
REC11116000004	26/04/2011 17:11:56	2000	Kgs	Raw materials 3	Supplier 3		
REC11116000005	26/04/2011 17:12:21	1500	Kgs	Raw materials 2	Supplier 2		
REC11116000006	26/04/2011 17:12:40	1500	Kgs	Raw materials 3	Supplier 3		
REC11116000007	26/04/2011 17:13:11	1000	Kgs	Raw materials 1	Supplier 1		
REC11116000008	26/04/2011 17:13:29	3000	Kgs	Raw materials 2	Supplier 2		
REC11116000009	26/04/2011 17:13:51	1500	Kgs	Raw materials 3	Supplier 3		
REC11116000010	26/04/2011 17:14:13	1000	Kgs	Raw materials 3	Supplier 3		
REC11116000011	26/04/2011 17:18:07	2000	Kgs	Raw materials 1	Supplier 1		

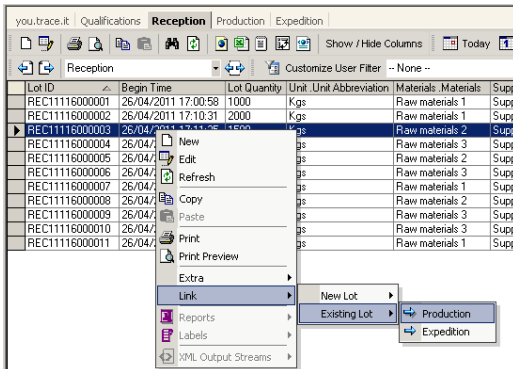
The Lot Genealogy Tree shows the relationship between both lot IDs:



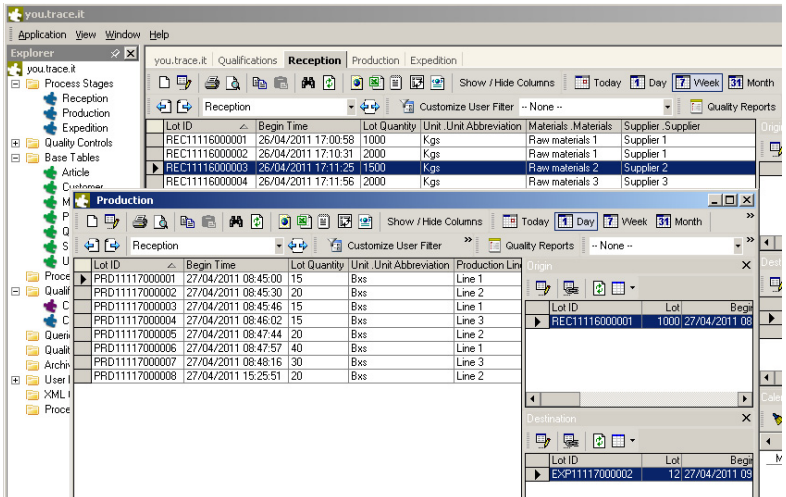
Link to existing lot ID

Proceed as follows to link lot IDs to existing lot IDs in consecutive process stages:

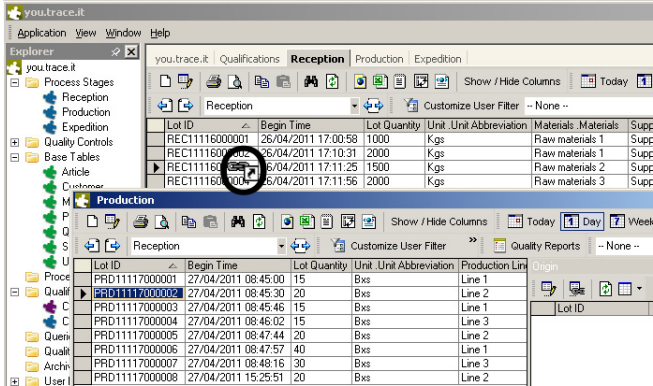
- 1 Right-click the lot ID record and point to **Link**.
Hold the Ctrl key to select multiple records.
- 2 Select **Existing Lot** and point to the target process stage:



- 3 The grid of the target process stage appears:

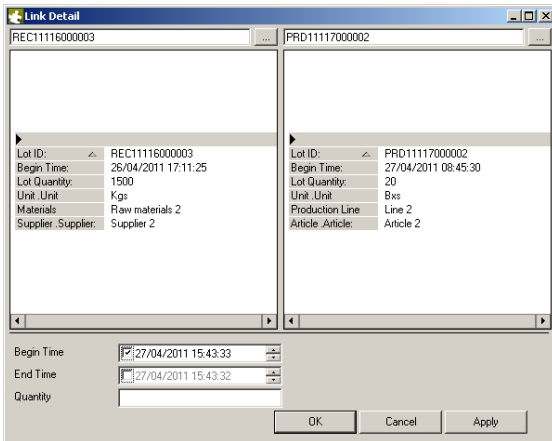


- 4 Drag and drop the source lot ID onto the target lot ID:



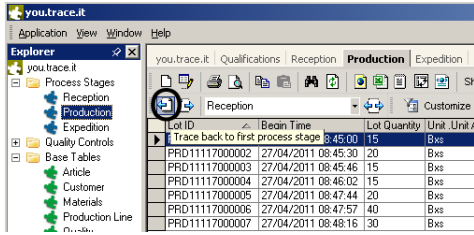
- The direction of dragging and dropping the lot ID records (source to target or target to source) does not matter since you.trace.it takes into account the logical sequence of process stages.

The Link Detail window pops up to specify linked lot quantities:

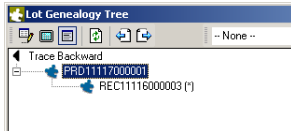


- 5 In the Quantity box, enter the number of units from the source lot ID that are used in the target lot ID. Click **OK**.

6 Test the link by performing trace back on target lot ID:



The Lot Genealogy Tree shows the relationship between both lot IDs:



Tracking & tracing lot IDs

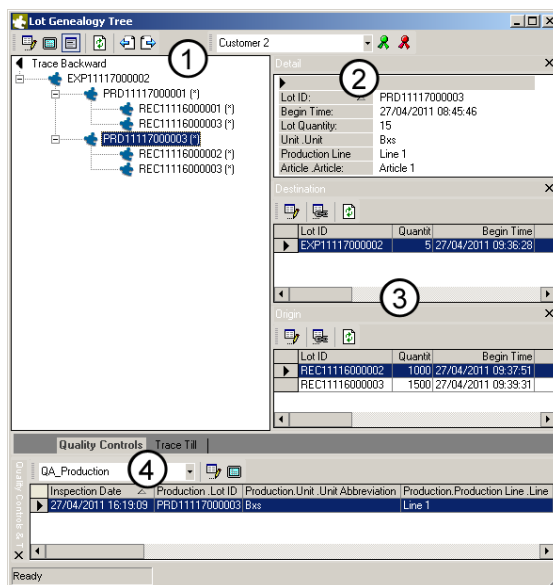
Lot Genealogy Tree

Thanks to the link between related lot IDs in consecutive process stages, you can trace the path of raw materials, half-finished products or articles through the intermediate process stages. You have several options for tracking and tracing the production path of lot IDs:

- trace the origin of lot ID records (trace back)
- track the destination of lot ID records (trace forward)
- track or trace related lot ID records in a target process stage (trace till)
- combine track and trace options for recalls.

☒ Refer to “Track & Trace toolbar” on page 21 for details on the Track & Trace toolbar.

Results of tracking and tracing lot IDs are displayed in the Lot Genealogy Tree:




- 1 Lot Genealogy Tree displays related lot IDs in consecutive process stages.
- 2 Attribute values of selected lot ID in Lot Genealogy Tree.

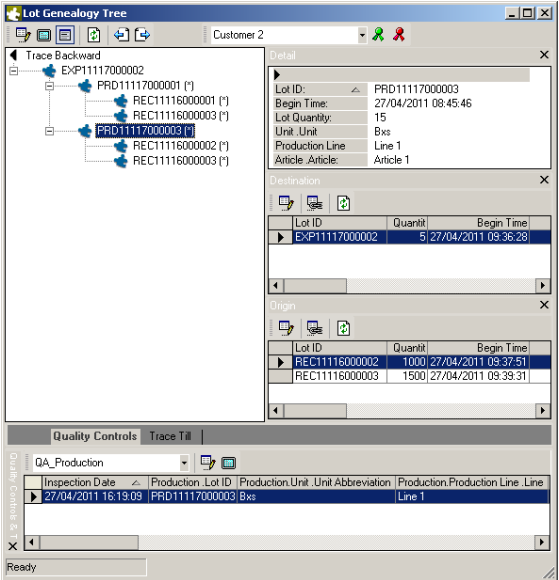
- 3 The destination and origin panels display parent and/or child lot ID records.
- 4 Quality Controls tab: Related quality control records for selected lot ID in Lot Genealogy Tree, if available.
Trace Till tab: Displays related lot IDs in process stage selected from drop-down list.

Trace backward

The trace backward command shows the related lot IDs in all process stages, prior to the stage to which the selected lot ID belongs. The expanded Lot Genealogy Tree lists the lot IDs from which the selected lot ID originates, up to the initial process stage, i. e. where the raw materials were registered in the database.

- 1 Select the lot ID of which you want to trace the origin.
- 2 Click  in the Track & Trace toolbar and expand the Lot Genealogy Tree.

The related lot IDs in the preceding process stages are listed:



Lot Genealogy Tree

Customer 2

Trace Backward

- EXP11117000002 (*)
 - PRD11117000001 (*)
 - REC11116000001 (*)
 - REC11116000003 (*)
 - PRD11117000003 (*)
 - REC11116000002 (*)
 - REC11116000003 (*)

Detail

Lot ID: PRD11117000003
 Begin Time: 27/04/2011 08:45:46
 Lot Quantity: 15
 Unit: Bxs
 Production Line: Line 1
 Article: Article 1

Destination

Lot ID	Quantit	Begin Time
EXP11117000002	5	27/04/2011 09:35:28

Origin

Lot ID	Quantit	Begin Time
REC11116000002	1000	27/04/2011 09:57:51
REC11116000003	1500	27/04/2011 09:39:31

Quality Controls | Trace Till

QA_Production


Inspection Date	Production Lot ID	Production Unit	Unit Abbreviation	Production Line
27/04/2011 16:13:09	PRD11117000003	Bxs		Line 1

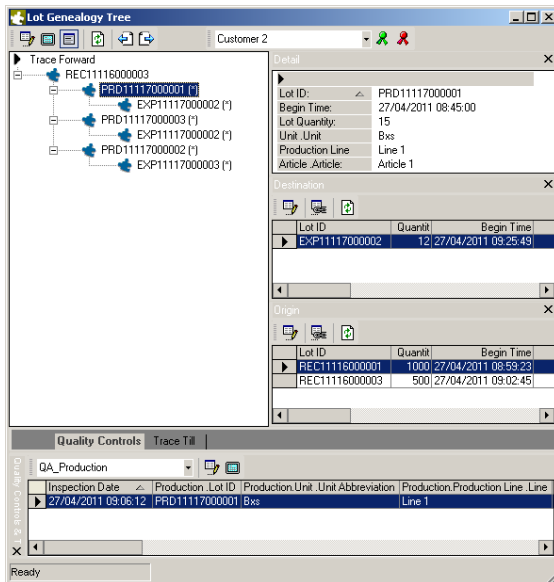
Ready

- 3 Select a lot ID in the Lot Genealogy Tree, then click the Quality Controls tab to view related quality control records.

Trace forward

The trace forward command shows the related lot IDs in all process stages, subsequent to the stage to which the selected lot ID belongs. The expanded Lot Genealogy Tree lists the lot IDs into which the source lot ID was transformed during the following process stages up to its final destination, i.e. the last process stage where the articles are shipped to customers.


- 1 Select the lot ID of which you want to track the destination.
- 2 Click  in the Track & Trace toolbar and expand the Lot Genealogy Tree. The related lot IDs in subsequent process stages are listed:

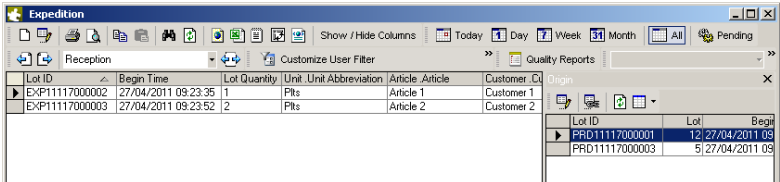


- 3 Select a lot ID in the Lot Genealogy Tree, then click the Quality tab to view related quality records.

Trace till

Trace till operations show a list of related lot ID records in the selected target process stage.

- 1 Select the lot ID record to be tracked or traced.
- 2 Select the target process stage in the Track & Trace toolbar.
- 3 Click  in the Track & Trace toolbar.
The related lot ID records in that process stage are listed:



The screenshot shows the Expedition software interface. At the top, there is a menu bar with options like 'Show / Hide Columns', 'Today', '1 Day', '7 Week', '31 Month', and 'All'. Below the menu bar is a toolbar with various icons. The main area contains a table with the following data:

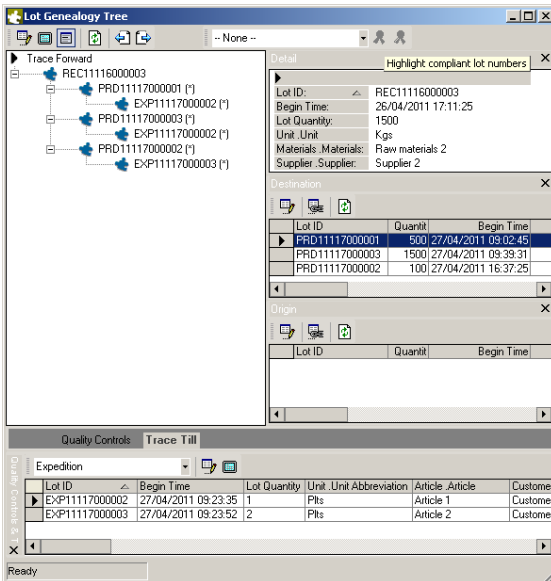
Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Article / Article	Customer / Customer
EXP11117000002	27/04/2011 09:23:35	1	Pks		Article 1	Customer 1
EXP11117000003	27/04/2011 09:23:52	2	Pks		Article 2	Customer 2

Below the table, there is a 'Trace Till' window with a dropdown menu showing 'Lot ID' and a list of related lot IDs:

Lot ID	Lot	Begin
PRD11117000001	12	27/04/2011 09
PRD11117000003	5	27/04/2011 09

- or -

You can also get an overview of related lot IDs in a target process stage from within the Lot Genealogy Tree window. Select the Trace Till tab, and point to the process stage in the drop-down list:



The screenshot shows the Lot Genealogy Tree software interface. The main area displays a tree view of lot IDs:

- REC11116000003
 - PRD11117000001 (*)
 - EXP11117000002 (*)
 - PRD11117000003 (*)
 - EXP11117000002 (*)
 - PRD11117000002 (*)
 - EXP11117000003 (*)

On the right, there is a 'Detail' window showing information for a selected lot ID:

Lot ID: REC11116000003
Begin Time: 26/04/2011 17:11:25
Lot Quantity: 1500
Unit / Unit: Kgs
Materials / Materials: Raw materials 2
Supplier / Supplier: Supplier 2

Below the detail window is a 'Trace Till' window with a table of related lot IDs:

Lot ID	Quantity	Begin Time
PRD11117000001	500	27/04/2011 09:02:45
PRD11117000003	1500	27/04/2011 09:39:31
PRD11117000002	100	27/04/2011 16:37:25

At the bottom, there is a 'Trace Till' window with a table of related lot IDs:

Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Article / Article	Customer
EXP11117000002	27/04/2011 09:23:35	1	Pks		Article 1	Customer
EXP11117000003	27/04/2011 09:23:52	2	Pks		Article 2	Customer


The related lot IDs are listed in the Trace Till grid.

Recall lot IDs

To recall contaminated articles from the supply chain, you must:

- find out the lot ID(s) to which the contaminated articles belong.
- find the related lot IDs in the initial process stage (raw materials).
check quality characteristics of traced lot IDs using qualifications.
- find any lot IDs that originate from the possibly contaminated lot IDs in the initial process stage.

Proceed as follows to determine lot IDs that may be related to contaminated articles:

- 1 Select the lot ID to which the contaminated article(s) belong, and of which you want to trace the origin.
- 2 Click  in the Track & Trace toolbar.
The related lot IDs in preceding process stages are listed:

Lot Genealogy Tree

Customer 2

Trace Backward

- EXP11117000002
 - PRD11117000001 (*)
 - REC11116000001 (*)
 - REC11116000003 (*)
 - PRD11117000003 (*)
 - REC11116000002 (*)
 - REC11116000003 (*)

Detail

Lot ID: PRD11117000001
Begin Time: 27/04/2011 08:45:00
Lot Quantity: 15
Unit: Bxs
Production Line: Line 1
Article: Article 1

Destination

Lot ID	Quantit	Begin Time
EXP11117000002	12	27/04/2011 09:25:43

Origin

Lot ID	Quantit	Begin Time
REC11116000001	1000	27/04/2011 08:59:23
REC11116000003	500	27/04/2011 09:02:45

Quality Controls Trace Till

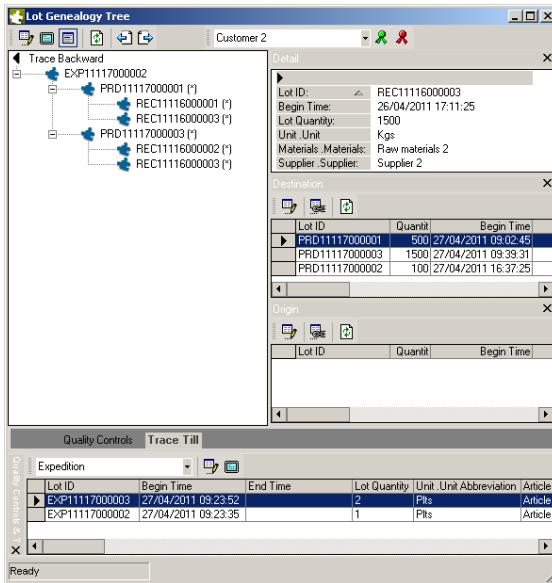
QA_Production

Inspection Date	Sample Size	Humidity (%)	Quality Quality
27/04/2011 09:05:12	1	5,9	AA

Ready

Check quality characteristics of the traced lot IDs using qualifications. See “Qualifications in Log Genealogy Tree” on page 53.

- Expand the Lot Genealogy Tree up to the lot ID(s) in the initial process stage. Then, highlight one of the reception lot IDs, click the Trace Till tab and select the process stage from the scroll list (usually final stage - Expedition):

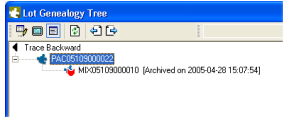


The expedition lot ID records that are directly or indirectly related to the selected reception lot ID, are listed in the Trace Till grid.

- Create a shortlist of all related, and possibly contaminated, lot IDs.

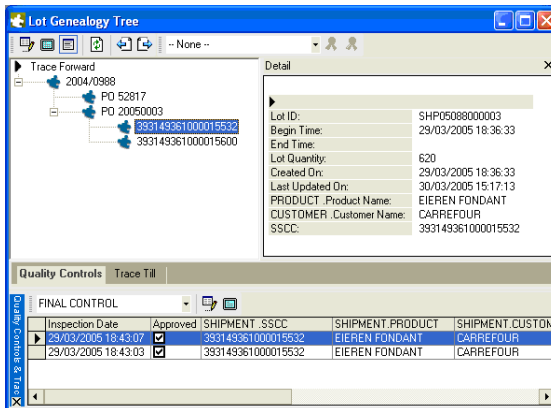
Archived lot IDs in Lot Genealogy Tree

Since lot IDs are archived and cleared from the database at regular intervals, you may find that part of the lot ID's genealogy is missing. However, a reference to the respective archive indicates where you can find the rest of the lot ID's genealogy:



Identifying fields in Lot Genealogy Tree

Lot genealogies may not display lot IDs in the tree view because the process stage to which the lot ID belongs has an identifying field other than the lot ID, which is the default identifying field for process stages.



To switch between identifying fields and lot IDs, click the Toggle ID Fields button in the toolbar.

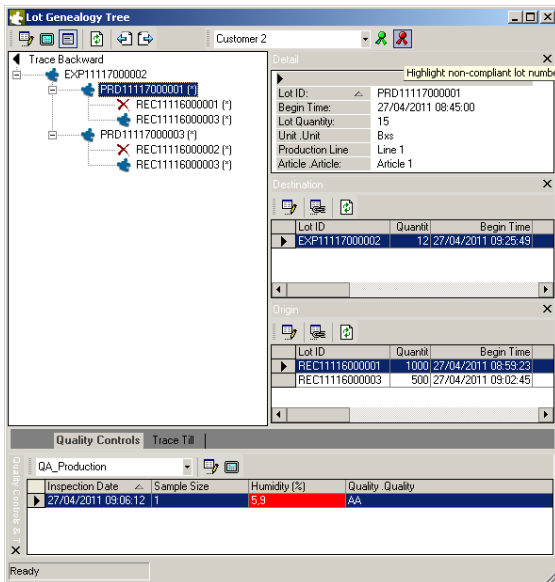
Qualifications in Lot Genealogy Tree

It is important that you can quickly determine whether lot IDs in the Lot Genealogy Tree meet particular quality requirements, e.g. imposed by customers. With qualifications, you can define limits for the values that must be checked. See “Qualifications” on page 59 for more information on creating and applying qualifications.

You can check whether records in a grid meet the limits in a qualification, but also in a Lot Genealogy Tree.

Proceed as follows to apply qualifications in a Lot Genealogy Tree:

- 1 Select the lot ID in the Lot Genealogy Tree to check whether its lot ID or quality values meet the limits in the qualification.



- 2 Select the qualification to be applied from the scroll list in the toolbar. In the example above, the quality record linked to the PRD lot ID contains an attribute 'Humidity'. Since the limit for the attribute determines that its value may not exceed 5 %, the field is highlighted.
- 3 Click or to indicate compliant or non-compliant lot IDs in the tree. Because the attribute value does not comply with the limit, the corresponding lot ID is considered non-compliant with the requirements for that qualification.

CHAPTER 5

Quality Controls & Qualifications

This chapter informs you on how to manage product quality with you.trace.it. You learn how to insert and retrieve quality records for lot ID records.

Furthermore, you will be taught how to define qualifications, i.e. collections of limits for attributes of lot IDs and quality records. This way, you can check whether lot IDs (and related quality records) comply with the quality requirements of your customers.

Introduction


Quality records

Quality controls are available for critical control points in the production flow. Provided that a quality control is linked to a process stage, quality characteristics of lot IDs can be kept in quality records.

- This may involve quality tests on samples taken from batches of raw materials or half-finished products. Results can be inserted in the database using the available forms.
- On the other hand, quality records may be inserted automatically when they involve real-time process monitoring of critical machine parameters (temperatures, defects, stops).

Record registration

A sample is taken from a batch of products and checked. The results of the quality control are inserted into the database by filling in the fields on a form. See page 58.

 You can only insert quality records for lot IDs when a quality control is related to that process stage. The process stage window features a secondary quality grid. See page 37.

Record linking

Quality records are linked to the selected lot ID record or to the active lot ID in the process stage in case of automatic registration. Finally, quality controls yield valuable quality information on tracked or traced lot IDs because quality records related to lot IDs are displayed in the Lot Genealogy Tree.

Qualifications

In grids and Lot Genealogy Trees, you can check whether the values and quality characteristics of traced lot IDs (and related quality records) meet customer requirements by applying the corresponding qualification. Non-compliant lot IDs can be highlighted. See "Applying qualifications to records" "Applying qualifications to records" on page 63 for more information.

Quality control grids

Process stage window

Quality records must always be linked to a lot ID record. That is why you must always select a lot ID record first, before you can insert quality records into the database! If a quality control is related to a process stage, the grid of that process stage is split horizontally. The upper grid lists the lot ID records. When you select lot ID records, linked quality records are displayed in the lower half.

The quality grid in process stage windows allows to insert quality records:

The screenshot shows the you.trace.it application window. The main area displays a table of lot ID records for a 'Production' process stage. The table has columns for Lot ID, Begin Time, End Time, Lot Quantity, Unit, Unit Abbreviation, Production Line, Line, and Article. The selected row is PRD11117000005, which is highlighted in blue. A circled '1' is placed over this row. Below the lot ID grid, a quality grid is visible, showing a table with columns for Inspection Date, Production Lot ID, Production Unit, Unit Abbreviation, Production Line, Line, Production Article, Article, Sample Size, and Humidity (%). The selected row is 27/04/2011 10:51:33, PRD11117000005, Bxs, Line 2, Article 2, 12, 15. A circled '3' is placed over this row. A circled '2' is placed over the 'QA_Production' dropdown menu at the bottom of the quality grid.

Lot ID	Begin Time	End Time	Lot Quantity	Unit	Unit Abbreviation	Production Line	Line	Article
PRD11117000001	27/04/2011 08:45:00		15	Bxs		Line 1		Article 1
PRD11117000002	27/04/2011 08:45:30		20	Bxs		Line 2		Article 2
PRD11117000003	27/04/2011 08:45:46		15	Bxs		Line 1		Article 1
PRD11117000004	27/04/2011 08:46:02		15	Bxs		Line 3		Article 3
PRD11117000005	27/04/2011 08:47:44		20	Bxs		Line 2		Article 2
PRD11117000006	27/04/2011 08:47:57		40	Bxs		Line 1		Article 1
PRD11117000007	27/04/2011 08:48:16		30	Bxs		Line 3		Article 3

Inspection Date	Production Lot ID	Production Unit	Unit Abbreviation	Production Line	Line	Production Article	Article	Sample Size	Humidity (%)
27/04/2011 10:51:33	PRD11117000005	Bxs		Line 2		Article 2		12	15

- 1 Lot ID records in table of opened process stage.
- 2 Quality toolbar allows to select type of quality control if more than one type of quality control is available for the process stage; see page 21.
- 3 Linked quality records for selected lot ID.

Quality control window

The quality control window lists all quality records of a particular type. You cannot insert records, but you can check whether quality records meet qualification requirements or not:

The screenshot shows the 'you.trace.it' application window with the 'Quality Control' window open. The window title is 'you.trace.it | Production | Reception | QA_Production'. The table displays quality records with columns for 'Quality Quality', 'Inspection Date', 'Sample Size', and 'Humidity (%)'. The records for 'AA', 'B', and 'BB' are highlighted in green, indicating they do not comply with the limits. The 'Humidity (%)' values for these records are 3, 15, and 19, respectively. The window also includes a navigation pane on the left, a toolbar at the top, and a calendar on the right.

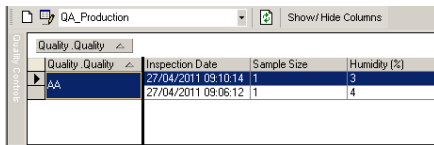
Quality Quality	Inspection Date	Sample Size	Humidity (%)
A	27/04/2011 10:27:03	1	3
AA	27/04/2011 09:10:14	1	4
	27/04/2011 16:19:09	1	5,3
	27/04/2011 10:51:10	1	11
B	27/04/2011 10:51:33	2	15
	27/04/2011 10:51:45	1	18
BB	29/04/2011 10:37:55	1	19

When attribute values do not comply with the limits in the active qualification, the quality record is highlighted. Refer to "Applying qualifications to records" on page 63 for details.

Quality records

Quality records & attributes


A quality record can be kept for every type of quality test performed on lot IDs. This record contains the test results or the values of the real-time quality control. An example:

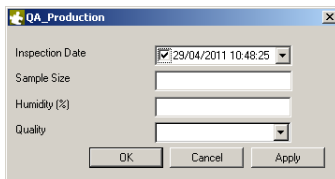


Quality	Quality	Inspection Date	Sample Size	Humidity [%]
▶	AA	27/04/2011 09:10:14	1	3
		27/04/2011 09:06:12	1	4

Insert quality records

Proceed as follows to insert a quality record for a lot ID:

- 1 Open the process stage folder and select the lot ID for which you want to insert quality data.
- 2 If multiple quality controls are available for a process stage, select the type of quality record you want to add from the Quality toolbar.
- 3 Click  in the Quality toolbar.
- or -
Drag and drop the lot ID record into the Quality grid.
The form for the quality control appears:



QA_Production



Inspection Date: 29/04/2011 10:48:25

Sample Size:

Humidity [%]:

Quality:

OK Cancel Apply

- 4 Specify the inspection date.
 - 5 Enter data or select it from the scroll lists.
Required information is indicated by red asterisks.
 - 6 Click **OK** to save the quality record.
-  To edit the quality record, select it and click  in the toolbar.

Qualifications

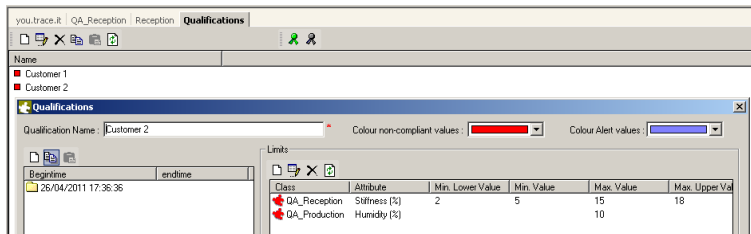
What

Customer quality requirements may vary and it is important that you can check whether or not the characteristics of lot IDs comply with the customer's demand. In you.trace.it, you can create qualifications, which are a collection of limits for the attributes of records in the database. So, for every characteristic that is important to your customers, and stored in a data record, you can set a minimum and/or maximum value per customer. By activating a qualification, records in the grid that contain non-compliant values, are highlighted.

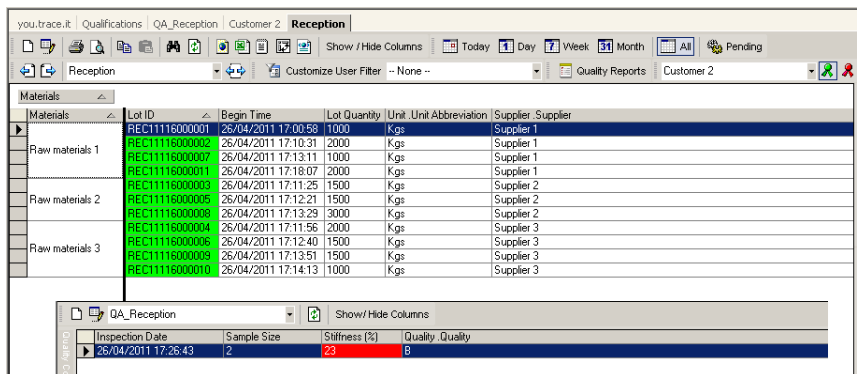
Example


Our customers impose different limits regarding the stiffness percentage of used raw materials.

This is the qualification for customer 2, containing two limits. A limit is created for the stiffness percentage, which is an attribute of the class QA_Reception (a quality control):



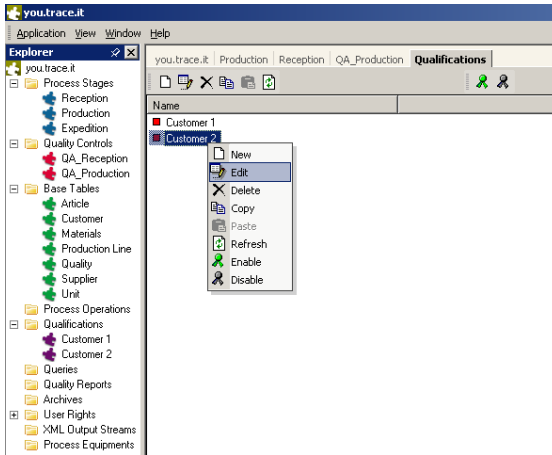
When you activate that qualification to check whether quality records, and consequently lot IDs, comply with the requirements, non-compliant values are highlighted:



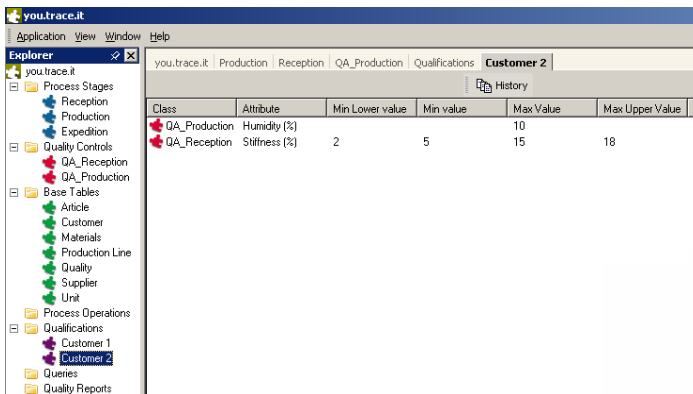
Since the stiffness value in the example above amounts to 23 %, and the maximum upper limit is 18 %, the value is highlighted in the quality record and non-compliant lot IDs are shown by clicking  in the Qualifications toolbar.

Qualifications grid

The qualifications grid lists available qualifications. The only way to edit existing qualifications is by right-clicking a qualification in the grid and pointing to Edit to change or add limits:



Qualifications contain limits for every attribute that must be 'qualified', i.e. checked whether the value of the attribute complies with the minimum and/or maximum value(s). You get an overview of the limits in a qualification by clicking the qualification in the folder list:



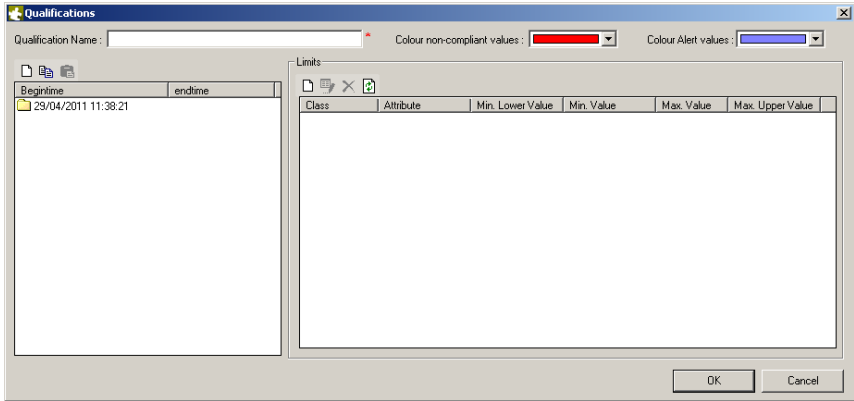
Creating qualifications and limits

You can create limits for attributes of lot ID, quality or base records. Since quality records are always related to a lot ID, the attributes of the linked quality records are also taken into account to assess whether a lot ID is compliant or not!

Proceed as follows to create a new qualification and limits:

- 1 Click  in the toolbar of the qualification grid.

The qualification form appears:

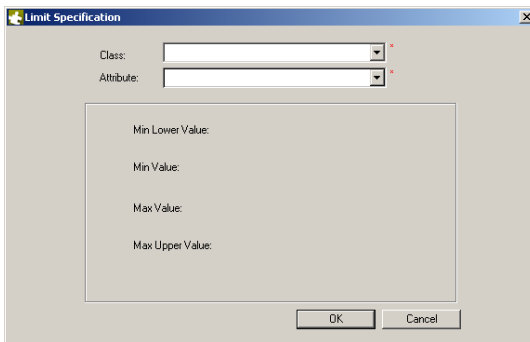


The dialog box titled "Qualifications" has a "Qualification Name" field at the top. To its right are two color selection dropdowns: "Colour non-compliant values" (set to red) and "Colour Alert values" (set to blue). Below these are two panes. The left pane is a table with columns "Begin time" and "end time", containing one entry: "29/04/2011 11:38:21". The right pane is titled "Limits" and contains a table with the following header:

Class	Attribute	Min. Lower Value	Min. Value	Max. Value	Max. Upper Value
-------	-----------	------------------	------------	------------	------------------

At the bottom right of the dialog are "OK" and "Cancel" buttons.

- 2 Enter a name for the qualification, e.g. customer name.
- 3 Select a colour to highlight non-compliant and/or alert values in records.
- 4 Right-click the Limits grid and point to **New Limit**:



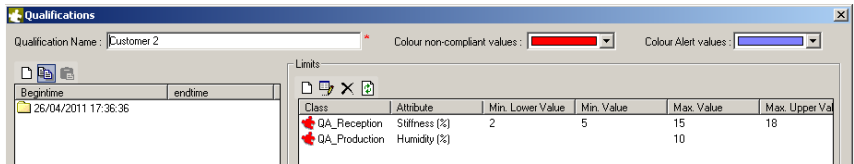
The dialog box titled "Limit Specification" has two dropdown menus: "Class" and "Attribute". Below them is a large text area with the following labels:

Min Lower Value:
Min Value:
Max Value:
Max Upper Value:

At the bottom are "OK" and "Cancel" buttons.

- 5 Select the process stage, quality control or base table from the Class scroll list.
- 6 Select the attribute.
- 7 Enter the minimum and/or maximum values.

- 8 Click **OK**.
The limit is added to the qualification:



- 1 Click **OK** to save the qualification.
- 2 To activate qualifications in order to assess lot IDs, refer to “Applying qualifications to records” on page 63.

Remarks

- In our example, we created a limit for the Stiffness attribute in the quality control QA_Reception. Based on the Stiffness attribute, the user selects the Quality attribute from a scroll list. The values in that scroll list are AA, A, B and BB. 23 % matches B quality. However, we cannot put a limit on the Quality attribute, since its values come from a base table. Hence, you cannot select the Quality attribute from the Attribute scroll list in the Limit Specification window.
- Enter identical min. and max. values if attribute values must be equal to a specific value.
- For check boxes, the values are -1 (ticked) and 0 (not ticked).

Applying qualifications to records

Usually, there will be different qualifications for different customers: qualification 1 contains the limits of customer 1, while qualification 2 contains the quality requirements of customer 2. You can select the qualification to be applied to process stages and quality controls in the Qualifications toolbar.

Qualifications assess the values for which limits were created. When they are applied to process stages, lot ID records are also assessed based on the values in linked quality records.

- ⚙️ Performance may be low when you apply qualifications to grids containing a lot of records.

Proceed as follows to apply qualifications:

- 1 Open the process stage or quality control grid:

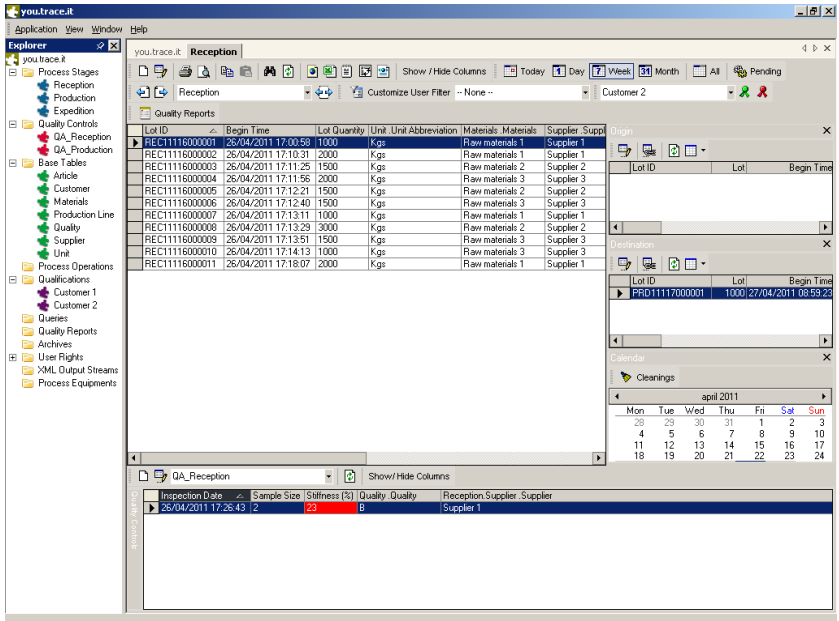
Lot ID	Begin Time	Lot Quantity	Unit	Unit Abbreviation	Materials	Supplier
REC1111600001	26/04/2011 17:00:59	1000	Kgs		Raw materials 1	Supplier 1
REC1111600002	26/04/2011 17:10:31	2000	Kgs		Raw materials 2	Supplier 1
REC1111600003	26/04/2011 17:11:25	1500	Kgs		Raw materials 2	Supplier 2
REC1111600004	26/04/2011 17:11:56	2000	Kgs		Raw materials 3	Supplier 3
REC1111600005	26/04/2011 17:12:21	1500	Kgs		Raw materials 2	Supplier 2
REC1111600006	26/04/2011 17:12:40	1500	Kgs		Raw materials 3	Supplier 3
REC1111600007	26/04/2011 17:13:11	1000	Kgs		Raw materials 1	Supplier 1
REC1111600008	26/04/2011 17:13:29	3000	Kgs		Raw materials 2	Supplier 2
REC1111600009	26/04/2011 17:13:51	1500	Kgs		Raw materials 3	Supplier 3
REC1111600010	26/04/2011 17:14:13	1000	Kgs		Raw materials 3	Supplier 3
REC1111600011	26/04/2011 17:18:07	2000	Kgs		Raw materials 1	Supplier 1



Inspection Date	Sample Size	Stiffness (K)	Quality	Supplier
26/04/2011 17:26:43	2	23	B	Supplier 1

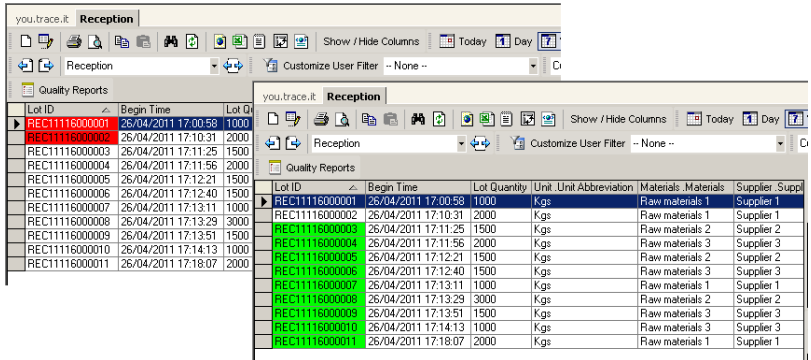
- 2 Select the qualification to be applied from the Qualifications toolbar.

- ⚙️ If there are no qualifications, or if existing qualifications do not contain limits for attributes in that process stage or quality control, selection is not possible.

Non-compliant values are highlighted:



- 1 [Only for process stages] Click  or  to highlight the lot ID records in the grid that comply (green) or do not comply (red) with the qualification limits.



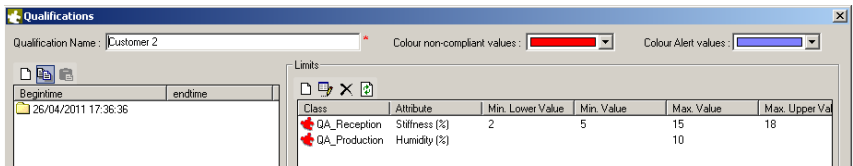
- 2 Turn off the qualification by selecting **None** or by clicking the compliant / non-compliant buttons again in the Qualifications toolbar.

Editing limits and consulting limit history

Create new version

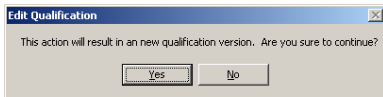
If you change limits in a qualification, a new version of that qualification is created. The settings of the old qualification are logged. Proceed as follows to change qualifications and limits:

- 1 Right-click the qualification in the grid and point to **Edit**:

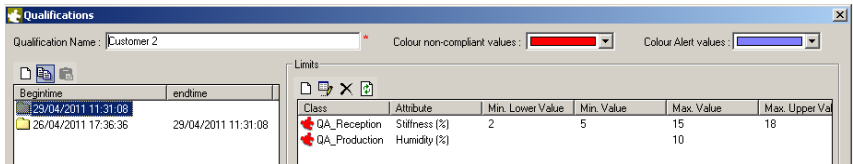



- 2 Double-click the limit, of which you want to change the settings.
- OR -
Right-click the Limits grid and point to **New Limit** to add a limit.

- 3 **New Limit** or **Edit Limit** brings up the following message:



- 4 Click **Yes**. A new version for the qualification is added.

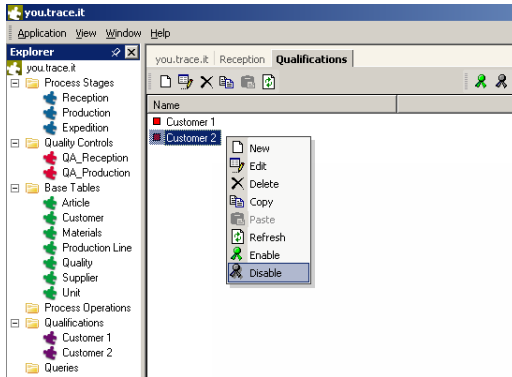


 The current set of limits for the qualification features no end time.

Disabling qualifications

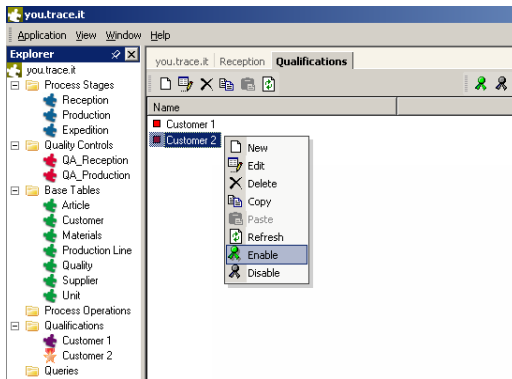
Proceed as follows to disable / enable qualifications:

- 1 Right-click the qualification in the grid and point to **Disable**:



The icon turns grey and the qualification can no longer be used.

- 2 To enable, right-click the disabled qualification and point to **Enable**.



A new version of the qualification is created.

CHAPTER 6

Base Tables

This chapter makes you familiar with base tables. Base tables contain basic data records that are used to identify lot ID and quality records. Examples are lists of customers, suppliers, employees, quality labels, units, storage locations, etc. These data often appear in scroll lists on forms to insert lot IDs and quality records in the database.

Introduction

Base tables contain referential information to describe lot IDs and quality records. When you insert lot ID records for a process stage 'Reception' into the database, you can select the supplier of the raw materials from a scroll list on the form for the process stage 'Reception'. The names in that list are taken from the base table 'Supplier', which allows to register raw material suppliers.

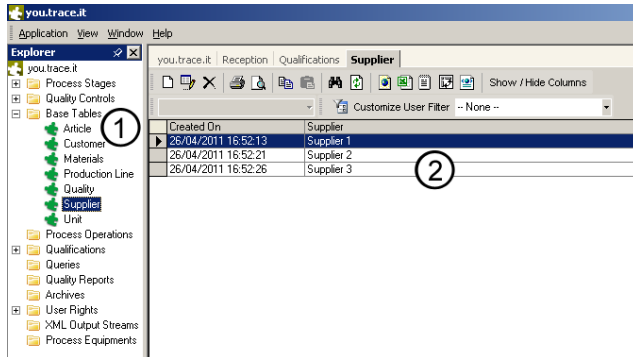
The screenshot displays the you.trace.it application interface. On the left, the Explorer pane shows the 'Base Tables' folder with 'Supplier' selected. The main window shows the 'Supplier' table with columns 'Created On' and 'Supplier'. Below this, a 'Supplier' dialog box is open, showing a scroll list of suppliers. In the background, the 'Reception' process stage form is visible, showing a scroll list of lot IDs and a 'Supplier' dropdown menu. A scroll list on the form of process stage 'Reception' to select supplier is indicated by an arrow pointing to the 'Supplier' dropdown menu.

base table 'Supplier' to insert suppliers in the database

scroll list on form of process stage 'Reception' to select supplier

Base table grids

The base table grid allows to insert referential data into the database to describe lot IDs and quality records:



- 1 Overview of available base tables.
- 2 The base table grid displays the records in the selected base table.

Base table records




Base records & attributes

A record is kept for every item that is added to a base table. The records are displayed in the grid and may consist of several attributes. An example:

Created On	Supplier
26/04/2011 16:52:13	Supplier 1
26/04/2011 16:52:21	Supplier 2
26/04/2011 16:52:26	Supplier 3

Insert records

Proceed as follows to insert records in base tables:

- 1 Open the base table of your choice.
- 2 Click  in the toolbar of the grid.
The form for the base table appears.
- 1 Enter data or select it from scroll lists.
Required information is indicated by red asterisks.
- 2 Click **OK** to save the record.
 To edit the record, select it and click  in the toolbar.

CHAPTER 7

Queries

SQL Queries allow to analyse and compare any data stored in the database. This chapter makes you familiar with using the query builder.

About queries

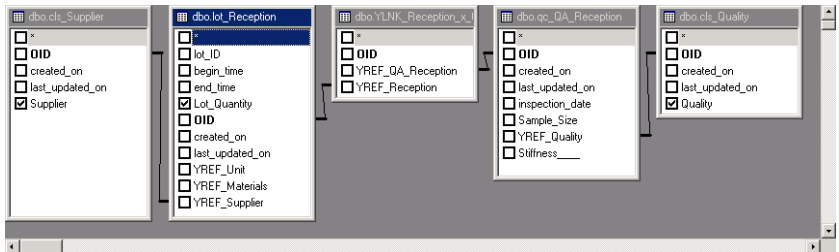
What

SQL queries make it possible to analyse and compare the data that are stored in the database, according to your criteria.

Example SQL query

You want to generate a report that lists the quality and quantity of raw materials delivered by all of your suppliers. Proceed as follows to build the query:

- 1 Since the quantity and quality of incoming materials are registered in different records, you have to link the tables in a query to bring the corresponding data together. Select the tables from the database and tick the check boxes of the attributes needed in the report. Since the OID attribute of a record is used to refer to data in other tables, you must link the OID attributes of referred tables to the counterparts in the referring tables:




- 2 The query design in the grid pane looks as follows after selecting and linking the tables and attributes:

Column	Alias	Table	Output	Sort Type	Sort Order	Criteria	Dr...
Supplier		dbo.cls_Supplier	<input checked="" type="checkbox"/>				
Lot_Quantity		dbo.lot_Reception	<input checked="" type="checkbox"/>				
Quality		dbo.cls_Quality	<input checked="" type="checkbox"/>				
			<input type="checkbox"/>				

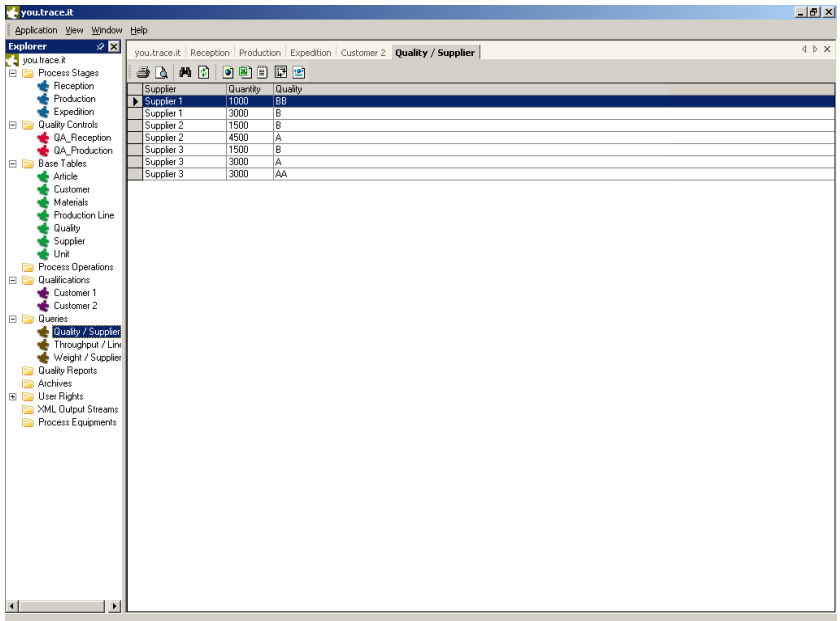
- 3 Add the Group By column to insert functions, set the sort order and include aliases, if required:

Column	Alias	Table	Output	Sort Type	Sort Order	Group By	Criteria
Supplier		dbo.cts_Supplier	<input checked="" type="checkbox"/>	Ascending	1	Group By	
Lot_Quantity	Quantity	dbo.lot_Reception	<input checked="" type="checkbox"/>	Ascending	2	Sum	
Quality		dbo.cts_Quality	<input type="checkbox"/>	Ascending	3	Group By	

- 4 Click  in the toolbar to execute the query:

Supplier	Quantity	Quality
Supplier 1	1000	BB
Supplier 1	3000	B
Supplier 2	1500	B
Supplier 2	4500	A
Supplier 3	1500	B
Supplier 3	3000	A
Supplier 3	3000	AA

- 5 Save the query and the results are updated every time you consult it in the grid:



The screenshot shows the 'you.trace.it' application window. The main area displays a grid with the following data:


Supplier	Quantity	Quality
Supplier 1	1000	BB
Supplier 1	3000	B
Supplier 2	1500	B
Supplier 2	4500	A
Supplier 3	1500	B
Supplier 3	3000	A
Supplier 3	3000	AA

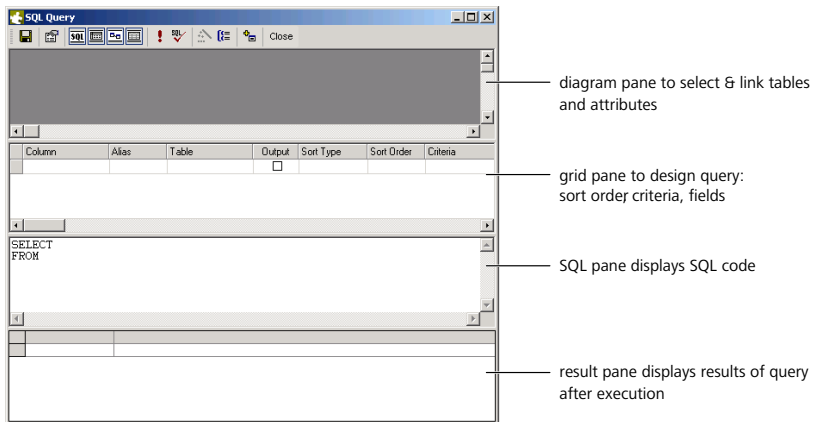
- 6 Export the grid to HTML, MS Excel, ASCII, PivotTable or XML to generate reports or create graphical representations.


SQL Queries

Query builder

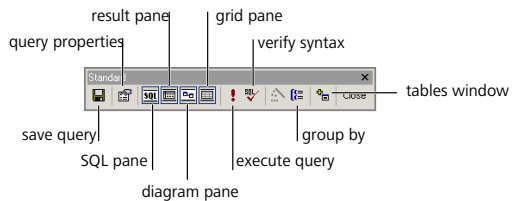
The SQL query builder allows to create statistics and reports by questioning the database. SQL queries are made in the SQL query builder. Proceed as follows to open the SQL query builder:

- Click  in the toolbar and point to SQL Query.
The SQL query builder consists of four major parts:




-  The SQL query builder is similar to the Microsoft Access Query Builder.
Also refer to the section on Working with Queries in Microsoft Access online Help.

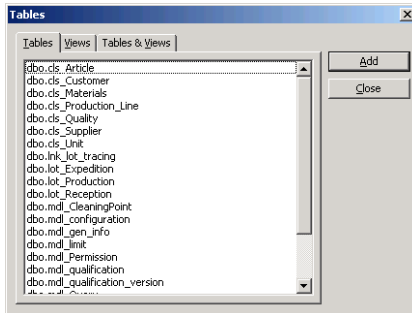
This is the SQL query builder toolbar:



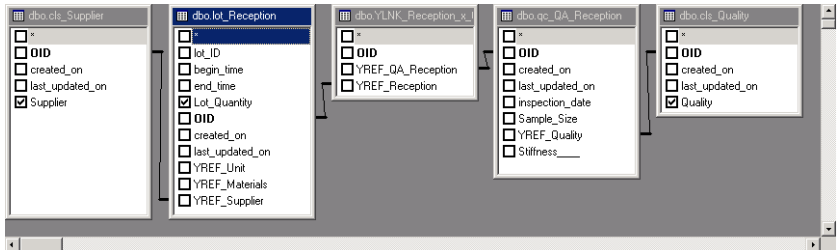
Add tables and fields


You must select the tables and fields in the database that contain the data you want to view, set criteria on, group by, update or sort. Tables and fields can be selected in the Tables window and are displayed in the diagram pane. Proceed as follows to select tables and fields that contain the data you want to work with:

- 1 Click  in the toolbar.
The Tables window pops up:



- 2 Select the **Tables** tab and double-click the tables that contain the data you need in your query.
They appear in the diagram pane.



-  To remove a table, select it in the diagram pane and press Delete.

- 3 Select the attributes to be used in your query by ticking the check boxes.

The fields appear in the grid pane.

Column	Alias	Table	Output	Sort Type	Sort Order	Criteria	Or...
Supplier		dbo.cls_Supplier	<input checked="" type="checkbox"/>				
Lot_Quantity		dbo.lot_Reception	<input checked="" type="checkbox"/>				
Quality		dbo.cls_Quality	<input checked="" type="checkbox"/>				
			<input type="checkbox"/>				

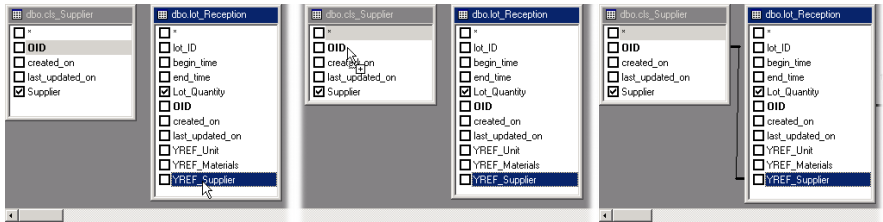
The grid pane consists of the following columns:

Columns	Description
Column	Selected column/attribute in the table
Alias	Distinctive description for attribute
Table	Table that contains the attribute
Output	Enable / disable output
Sort Type	Ascending - Descending - Unsorted
Sort Order	1 - 2 - etc. - Unsorted
Group By	Clauses or aggregate functions assigned to field
Criteria	Restrictions on a query
Or...	Specify 'Or' conditions

Link attributes

To bring data from different tables together, attributes must be linked by a join line in the diagram pane. Select an attribute [1], then drag & drop it onto the related attribute in the referred table [2].

A join line appears between both [3]:



To remove a join line between tables, click it and press Delete.

Set criteria to select specific data

Criteria are restrictions on a query to identify the specific records you want to work with. For example, you can only show the quantities of quality A delivered by all of your suppliers. To specify criteria, select the Where clause in the Group By column and enter the expression in the Criteria cell for that field:


Column	Alias	Table	Output	Sort Type	Sort Order	Group By	Criteria	Or...
Supplier		dbo.ctc_Supplier	<input checked="" type="checkbox"/>	Ascending	1	Group By		
Quality		dbo.ctc_Quality	<input type="checkbox"/>			Where	= 'A'	
Lot_Quantity	Quantity	dbo.lot_Reception	<input checked="" type="checkbox"/>	Ascending	2	SUM		
			<input type="checkbox"/>					

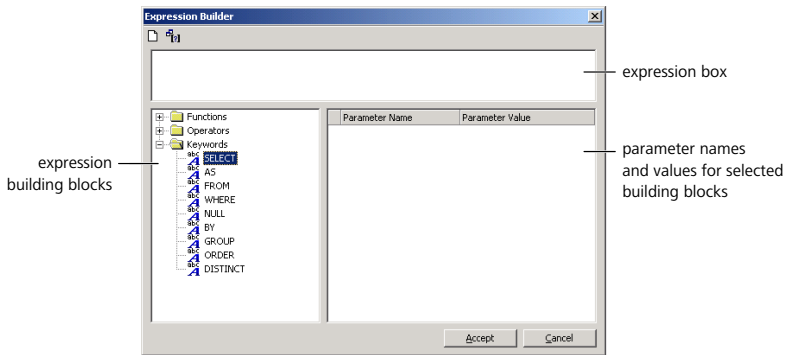
You can use comparison operators such as 'equal' (=), 'less than' (<), 'less than or equal to' (<=), 'greater than' (>), etc. You can also enter additional criteria by adding And/OR operators. By using the And operator in a criteria cell only the records that meet all specified criteria will be returned. The Or operator will return records that meet at least one of the specified criteria.



Use the Or... column to specify Or conditions. You do not need to specify the Or operator in the corresponding filter cell. And conditions must be inserted in the Criteria column.

Criteria are placed after the comparison operator and put in quotation marks automatically. Criteria must be linked to a Where clause in the Group By column.

You can also use the Expression builder to specify criteria expressions: click  in the toolbar.



Perform calculations

You can perform calculations on fields by specifying a function in the Group By column:


Function	Description
Count (distinct)	Returns the total number of values.
Sum	Returns the sum of the numeric values.
Max (distinct)	Returns the largest value.
Min (distinct)	Returns the smallest value.
Average	Returns the average value.

 The keyword 'distinct' eliminates duplicate values before a function is applied.

Execute queries

The result pane displays the result of the query after execution.


Proceed as follows to execute queries:

- Click  to execute the query.
The query result is displayed:

Supplier	Quantity	Quality
Supplier 1	1000	BB
Supplier 1	3000	B
Supplier 2	1500	B
Supplier 2	4500	A
Supplier 3	1500	B
Supplier 3	3000	A
Supplier 3	3000	AA


Save queries

Proceed as follows to save SQL queries:

- 1 Click .
- 1 Enter a distinctive name for the query.
- 2 Click OK to save.
The query is added to the query overview.

Edit queries

Proceed as follows to open an SQL query:

- 1 Select **Queries** in the folder list.
- 2 Select the SQL query in the grid to the right.
- 3 Click  in the toolbar.
The query is opened in the SQL query builder.

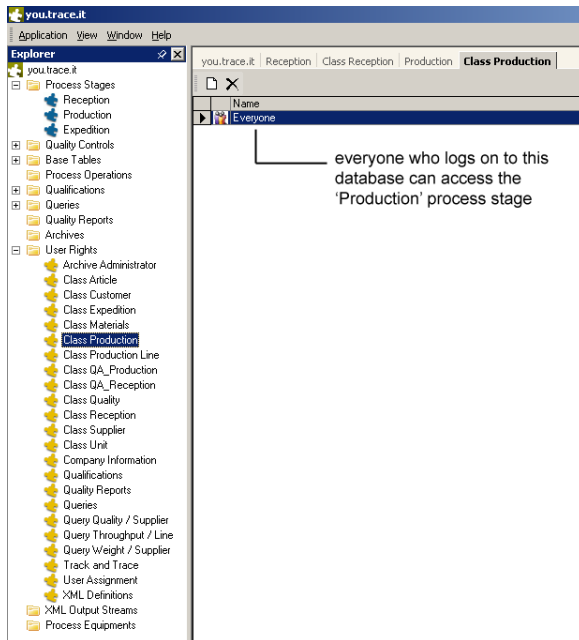
CHAPTER 8

User Rights

You can assign folder access rights to individual users of you.trace.it or to user groups.

About user rights

The User Rights folder in you.trace.it allows administrators to assign user rights to users or user groups so that they can perform particular actions or access classes. Default, 'Everyone' is assigned to all classes and actions!



If users may not have access to particular classes or may not perform particular actions, you must remove 'Everyone' from the corresponding user right instance. Log on to the database as an administrator and remove 'Everyone' by clicking **X**. Then, add the users or groups that may access the class or action.


Actions and folders

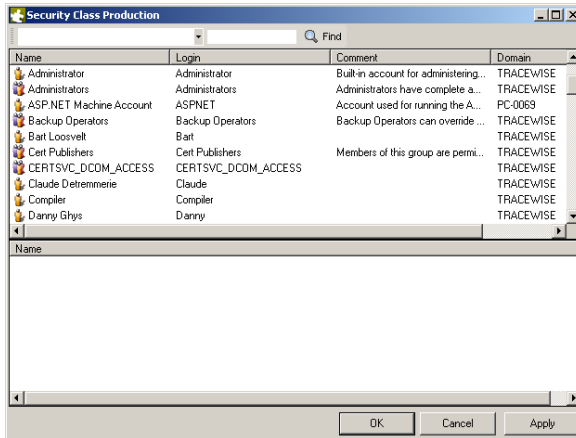
You can assign rights for the following pre-defined actions or folders in you.trace.it:

Item	Description
Classes	Grant rights to add and edit records in process stages, quality controls and base tables.
Qualifications	Grant rights to create and edit qualifications.
Queries	Grant rights to create and edit XML or SQL queries.
Query "Name"	Grant rights to use individual queries created in you.trace.it.
Track and Trace	Grant rights to perform trace forward, backward or till operation.
User Assignment	Grant rights to assign rights to users or user groups.
Other	Grant rights to perform custom-defined actions or access queries created in you.trace.it.
Archive Administrator	Grant rights to manage archives.
Quality Reports	Grant rights to manage Quality Reports.
Report/Label	Grant rights to view individual reports and labels.

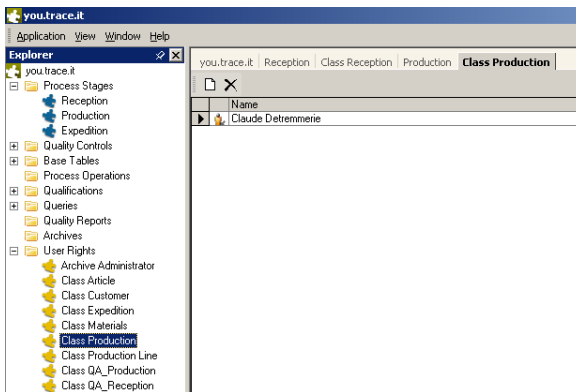
Assign user rights

Proceed as follows to assign rights to users or user groups:

- 1 Point to the User Rights folder and select the action or class to which you want to assign user rights.
- 2 Click  in the toolbar:



- 3 Double-click the user or user group who must have access to that class / perform an action.
- 4 Click **OK**.
The user or user group is added to the grid:



Only the selected user is granted access to the process stage Production.

CHAPTER 9

Reporting & Labelling

You can design quality reports for lot IDs. Quality reports are exported to MS Excel and contain information concerning the quality and life cycle of lot IDs.

Classes may also feature pre-configured report and label designs. They offer a means to print the grid contents or the selected record in a fixed manner.

Quality reports

What is it

A quality report retrieves information from the database for the selected lot ID, the related quality records in the database, linked lot IDs in other process stages, etc. Quality reports allow to gather information concerning the quality and life-cycle of a lot ID in one MS Excel worksheet.

Design

Report designs consist of a collection of attributes selected by the user from a complete list of attributes in the database. A report design lists the pieces of information in the database that give a clear view on the quality characteristics of a lot ID and its parent or child lot IDs in subsequent or previous process stages.

Seq	Attribute
1	Reception Lot ID
2	Reception Lot Quantity
3	Reception -> Reception_QA_Stiffness (%)
4	Reception -> Supplier_Supplier Name
5	Reception -> Supplier_Prav Materials

Report Name: Intake

Show Lot Genealogy: No Forward

Attributes to be included in report

Organise

You can create multiple designs for quality reports and organise related designs in subfolders of the Quality Reports folder in the folder list.

Report Type	Number of Rep...
Intake Reports	1
Packing Reports	0

Retrieve

To generate a Quality Report for a lot ID, just select it in the grid and hit the Quality Reports button. The corresponding data will be retrieved from the database and presented in a MS Excel worksheet.

The example below displays the worksheet that is generated with the report settings shown in the Design chapter above for a lot ID in the reception stage.

Selected attributes for lot IDs of process stage Reception

Lot ID for which a Quality Report is generated

Lot ID	Lot Quantity	Stiffness (%)	Supplier Name	Raw Materials	Lot ID	Lot Quantity	Humidity (%)	Abbreviation/Article
REC0409600001	1000	23	Supplier 2	RM2	PRD04097000001	15	5,9	Bxvs Article

Linked lot ID(s) in subsequent process stage (Forward) with selected attributes

Same example, but without lot genealogy turned on:

Lot ID	Lot Quantity	Stiffness (%)	Quality	Supplier Name	Raw Materials	Lot ID	Lot ID
REC0409600001	REC0409600001	1000	23	BB Supplier 2	RM2		

Report Generated On: 23/08/2004 14:57



Designed by TraceWise, Belgium

Remarks:

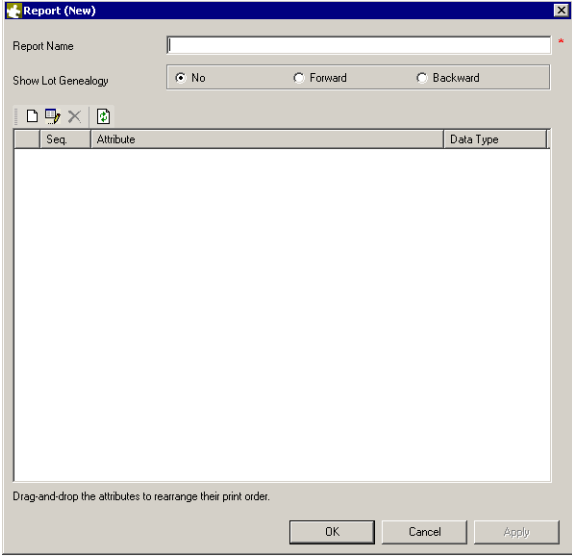
- The report title does not mention the lot ID if multiple lot IDs were selected.
- If lot IDs from different process stages feature identical attributes, those values appear in the same column, as from version 3.2. Reports no longer contain duplicate columns, e.g. for lot IDs (see above).
- Report top, bottom, left and right edges feature thin border lines.

Design quality reports

Proceed as follows to design quality reports:

- 1 Go to the Quality Reports folder.
- 2 Click  in the toolbar to create a subfolder, e.g. Intake Reports.
- 3 Expand the subfolder and click  in the toolbar.

The following window pops up:

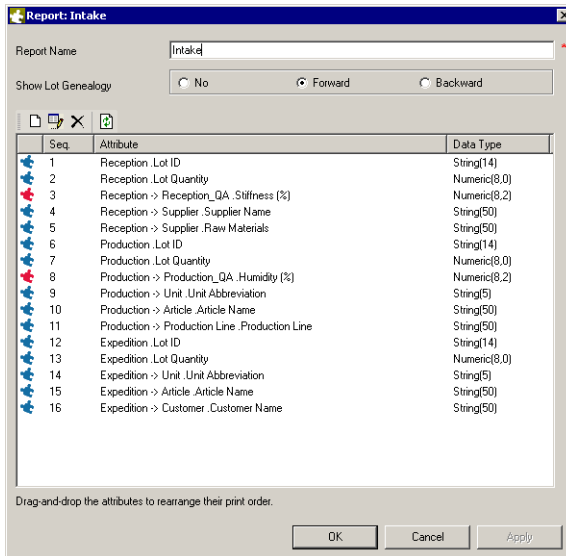



Seq.	Attribute	Data Type
------	-----------	-----------

- 4 Enter a name for your report.
- 5 If you want the report to contain lot genealogy information (tracking & tracing) about the selected lot ID, select the T&T direction, i.e. Forward or Backward.

8 Click **OK** to finish.

Selected attributes are listed in the Report Structure:



 Rearrange the order of appearance of the attributes in the quality report by means of drag and drop.

9 Click the Template Usage tab to include a MS Excel template.

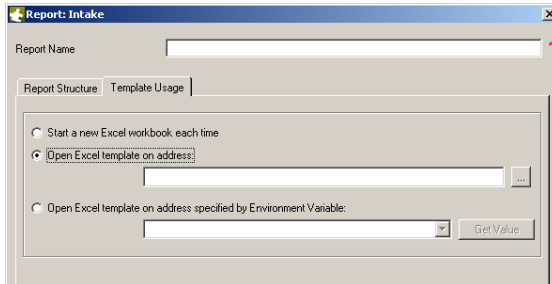
See "Use templates" on page 90.

10 Click **OK** to save the report design.

Use templates

You can now specify MS Excel templates (.xlt file) for quality reports in order to include your corporate logo. The template must be set once and is used each time the report is generated. Proceed as follows to include an MS Excel template for a quality report:

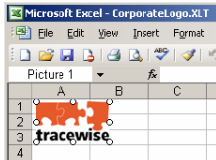
- 1 Select the **Template usage** tab.



- 2 Select the option **Open Excel template on address.**

If you do not want to use a template, select **Start new Excel workbook each time.**

- 3 Click ... to choose an *.xlt template file. An example:



- 4 Click **OK** to finish.

The resulting report layout may be as follows:

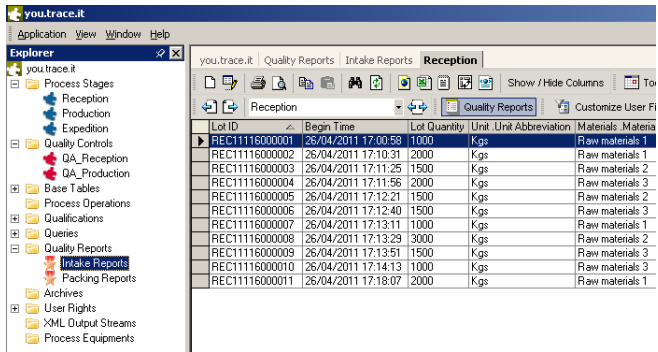
The screenshot shows a Microsoft Excel spreadsheet titled 'Microsoft Excel - CorporateLogo1'. The spreadsheet has a grid with columns Lot ID, Material Name, Name, and Produ. The report layout includes a corporate logo for 'tracewise' and the text 'QUALITY COM SHP050:'. The data is as follows:

Lot ID	Material Name	Name	Produ
SHP0503300001			
PRD0503300001			CHOCOLA
..RE.C0503300001	CANE SUGAR	CANDICO	
..RE.C0503300002	MILK SEMI-SKIMMED	CAMPINA	
..RE.C0503300003	CACAO	OXFAM	
PRD0503300002			
..RE.C0503300001 (supra)			CHOCOLA

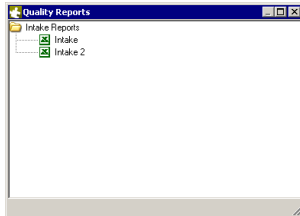
Retrieve quality reports

Proceed as follows to generate reports for lot IDs:

- 1 Select the lot ID(s) for which you want to generate a report:



- 2 Click **Quality Reports** in the toolbar.
The Report Selection window appears:



- 3 Double-click the Quality Report to be generated for the selected lot ID.
MS Excel is started and the report is built:

1	Demo									
2	Intake									
3	REC0409600001									
4	Lot ID	Lot ID	Lot Quantity	Stiffness (%)	Supplier Name	Raw Materials	Lot ID	Lot Quantity	Humidity (%)	AbbreviatArticle
5	REC0409600001	REC0409600001	1000	23	Supplier 2	RM2				
6	PRD04097000001						PRD04097000001	15	5.9	Bvs Article
7	EXP04097000001									
8										
9										

If a genealogy contains the same lot ID more than once, the quality report mentions its attributes and quality controls only once. Subsequent appearances of the lot ID are marked with: (supra).

- 4 Now, format, save or print your report.

Print reports and labels

A report is a pre-designed layout for presenting the grid contents of a class in a structured way, including calculated totals, sorted in distinct groups (e.g. per date or supplier), page and report headers and footers, etc.

In you.trace.it, you can only preview or print the report. You cannot edit it.

Proceed as follows to preview or print a report:

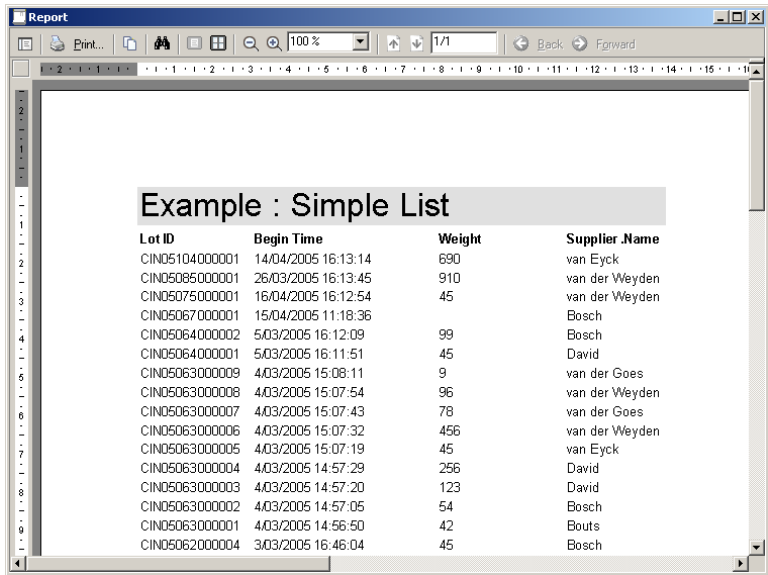
- 1 Right-click the grid and point to **Reports**.

Choose the report layout to be used to print/preview the grid contents:

The screenshot shows the application interface with a data grid. The grid has columns: Lot ID, Begin Time, End Time, Lot Quantity, Created On, Last Updated On, and Comments. The 'Reports' menu is open, showing options like 'List with Subreport', 'List', 'Form', 'Grouping', 'Grouping multi-level', 'Grouping on calculated fields', 'Grouping and aggregation', 'Grouping and conditional aggregation', 'Using formulas and calculated fields', 'Page N of M in PageFooter', and 'Report1'. The 'Print' and 'Preview' options are also visible in the menu.

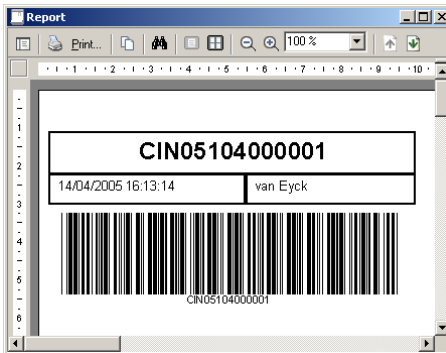
Lot ID	Begin Time	End Time	Lot Quantity	Created On	Last Updated On	Comments
CIN05104000001	14/04/2005 16:13:14			4/03/2005 16:13:14	27/04/2005 15:36:34	
CIN050895000001	26/03/2005 16:13:45			4/03/2005 16:13:45	27/04/2005 15:14:00	
CIN050750000001	16/04/2005 16:12:54			4/03/2005 16:12:54	27/04/2005 15:58:51	
CIN050670000001	15/04/2005 11:18:36			8/03/2005 11:18:36	27/04/2005 16:25:10	
CIN050470000001	16/03/2005 16:46:04			3/03/2005 16:46:04	4/03/2005 13:45:25	

The report is previewed:



Lot ID	Begin Time	Weight	Supplier Name
CIN05104000001	14/04/2005 16:13:14	690	van Eyck
CIN05085000001	26/03/2005 16:13:45	910	van der Weyden
CIN05075000001	16/04/2005 16:12:54	45	van der Weyden
CIN05067000001	15/04/2005 11:18:36		Bosch
CIN05064000002	5/03/2005 16:12:09	99	Bosch
CIN05064000001	5/03/2005 16:11:51	45	David
CIN05063000009	4/03/2005 15:08:11	9	van der Goes
CIN05063000008	4/03/2005 15:07:54	96	van der Weyden
CIN05063000007	4/03/2005 15:07:43	78	van der Weyden
CIN05063000006	4/03/2005 15:07:32	456	van der Weyden
CIN05063000005	4/03/2005 15:07:19	45	van Eyck
CIN05063000004	4/03/2005 14:57:29	256	David
CIN05063000003	4/03/2005 14:57:20	123	David
CIN05063000002	4/03/2005 14:57:05	54	Bosch
CIN05063000001	4/03/2005 14:56:50	42	Bouts
CIN05062000004	3/03/2005 16:46:04	45	Bosch

2 If you select Labels, the label layout for the record is previewed:



Depending on the type of report, the report or label will display the data for the current record or all records visible in the grid.


CHAPTER 10

Archiving & Database Management

You can create archives of lot ID records as a backup to keep your database up-to-date, manageable and performant.

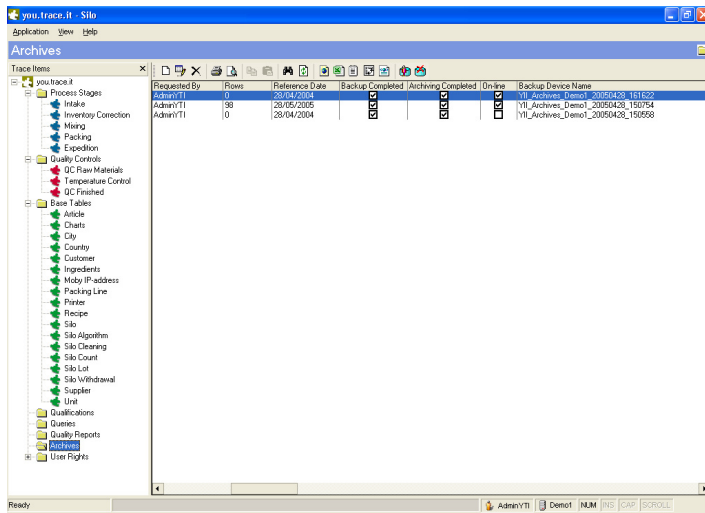
Moreover, you can manage the databases in your instance of MSDE or SQL Server using the Database Management console in you.trace.it (backup, restore or drop).

Archiving you.trace.it data

 Only available to users with Archive Administrator rights.

About archives

To allow the usability of extensive databases, you can archive lot ID records. Archived records are cleared from the class grids and stored as an archive in the Archives folder:



Each record in the Archives folder represents a set of archived lot ID records.
The following information is listed:

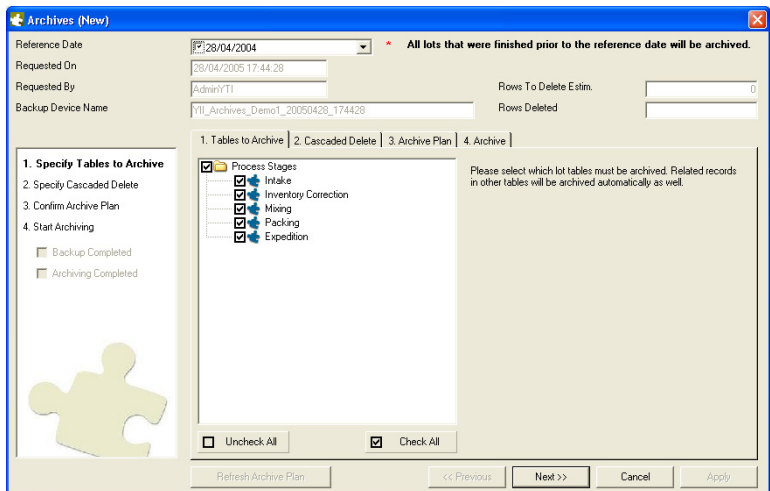
Item	Description
Requested by	User logged on to you.trace.it who created the archive
Rows	Number of archived records
Reference date	Lot ID records with end-time equal or prior to this date were archived
Backup Completed	If ticked, backup is completed successfully
Archiving Completed	If ticked, backup process is finished
On-line	If ticked the archive is currently restored for access
Backup Device Name	Name of the archive

Create archives

Proceed as follows to create a new archive:

- 1 Go to the Archives folder and click the New button.

The following window appears:



- 2 Select the **Reference Date**. All lot IDs prior to this date will be cleared and archived.
- 3 Tick the checkboxes of the process stages, for which you wish to archive the lot IDs that have an end-time prior to the reference date.
- 4 Click **Next**.
The following window appears:

- 5 Tick the checkboxes of the linked classes (M:N relationship) if you want them to be archived.
If lot ID records refer to other records, those records will be archived, too.

6 Click Next.

The following window appears:

Archives (New)

Reference Date: 28/04/2004 * All lots that were finished prior to the reference date will be archived.

Requested On: 28/04/2005 17:44:28

Requested By: AdminYTI Rows To Delete Estim.: 0

Backup Device Name: Y:\Archives_Demo1_20050428_174428 Rows Deleted: 0

1. Tables to Archive | 2. Cascaded Delete | 3. Archive Plan | 4. Archive

Step	Remove Rows From	Referencing To	Rows Estim.
01	[nk_lot_tracing]IN	lot_Intake	0
01.01	[nk_lot_tracing]IN	lot_Intake	0
01.02	[nk_lot_tracing]OUT	lot_Intake	0
01.03	qc_QC_Raw_Materials	lot_Intake	0
01.04	cls_Silo_Lot	lot_Intake	0
02	lot_Inventory_Correction	lot_Inventory_Correction	0
02.05	[nk_lot_tracing]IN	lot_Inventory_Correction	0
02.06	[nk_lot_tracing]OUT	lot_Inventory_Correction	0
02.07	cls_Silo_Lot	lot_Inventory_Correction	0
03	lot_Mixing	lot_Mixing	0
03.08	[nk_lot_tracing]IN	lot_Mixing	0
03.09	[nk_lot_tracing]OUT	lot_Mixing	0
03.10	qc_Temperature_Control	lot_Mixing	0
04	lot_Packing	lot_Packing	0
04.11	[nk_lot_tracing]IN	lot_Packing	0
04.12	[nk_lot_tracing]OUT	lot_Packing	0
04.13	qc_QC_Finished	lot_Packing	0
05	lot_Expedition	lot_Expedition	0
05.14	[nk_lot_tracing]IN	lot_Expedition	0
05.15	[nk_lot_tracing]OUT	lot_Expedition	0

Refresh Archive Plan << Previous Next >> Cancel Apply

7 A summary appears of the lot ID records about to be archived. Click Next to continue.

The following window appears:

Archives (New)

Reference Date: 28/04/2004 * All lots that were finished prior to the reference date will be archived.

Requested On: 28/04/2005 17:44:28

Requested By: AdminYTI Rows To Delete Estim.: 0

Backup Device Name: Y:\Archives_Demo1_20050428_174428 Rows Deleted: 0

1. Tables to Archive | 2. Cascaded Delete | 3. Archive Plan | 4. Archive

Backing Up Database

Completed On: []

Completed By: []

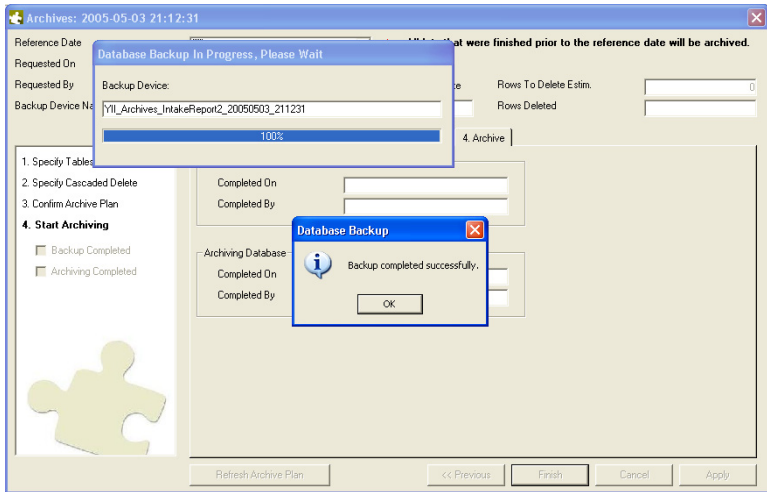
Archiving Database

Completed On: []

Completed By: []

Refresh Archive Plan << Previous Finish Cancel Apply

- Click **Finish**, then **Yes** to start archiving.



- Click **OK** to finish backing up data and start creating the archive.
- When archive creation is completed, click **OK** to confirm. The archive is added to the Archives folder.

Requested On	Requested By	Rows	Reference Date	Backup Completed	Archiving Completed	On-line	Backup Device Name
3/05/2005 21:12:31	Admin\YTI	0	3/05/2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	YTI_Archives_IntakeRepi
3/05/2005 21:07:45	Admin\YTI	0	3/05/2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	YTI_Archives_IntakeRepi
28/04/2005 9:55:37	Admin\YTI	0	28/04/2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	YTI_Archives_IntakeRepi
28/04/2005 9:55:17	Admin\YTI	0	28/04/2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	YTI_Archives_IntakeRepi

Both checkboxes Backup Completed and Archiving Completed are ticked.

Restore archives

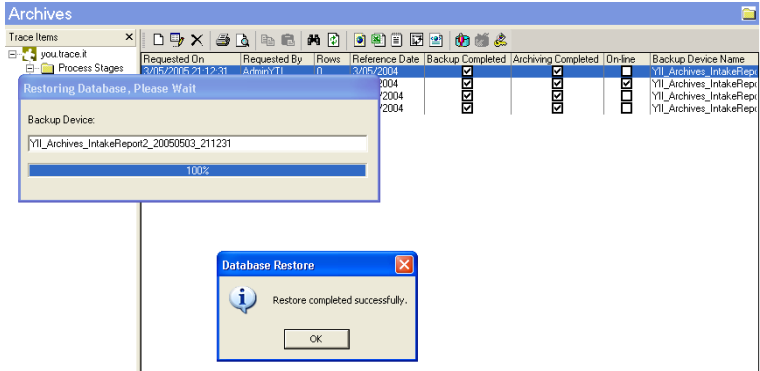
To consult archived data, you must log in to the archive. you.trace.it restores the data in the selected archive, which makes the records accessible (read-only).

Proceed as follows to restore archives:

- Select the archive to restore.

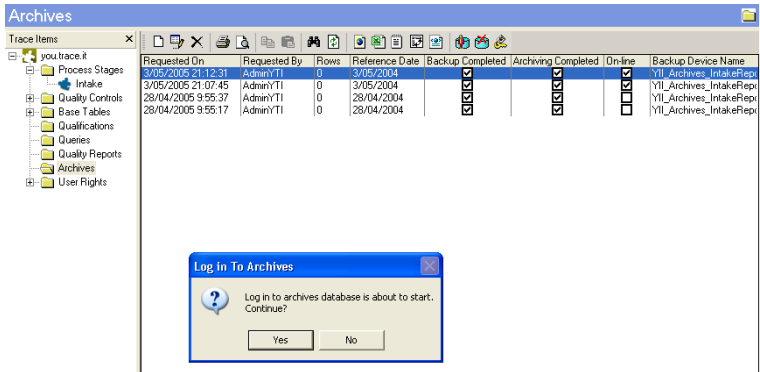
- 2 Right-click and point to **Log In To Archives**.

The archive is restored:



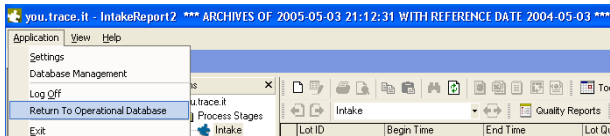
- 3 Click **OK** to continue.


you.trace.it logs on the restored archive with read-only permissions:



- 4 Click **Yes** to continue.

you.trace.it switches to the restored archive, see application title caption below. To return to the original operational database, go to the **Application** menu and point to **Return to Operational Database**:



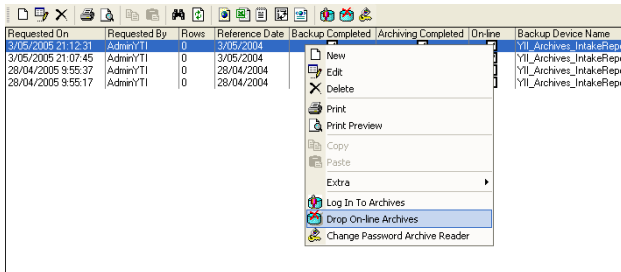
- 5 Click **Yes** to confirm logging off from restored archive and returning to the database you were previously connected to. you.trace.it requests you to log in again.
-  The restored archive remains online until it is removed from the database. To remove the archive from the database again, use the Drop Online Archives command.

Drop online archives

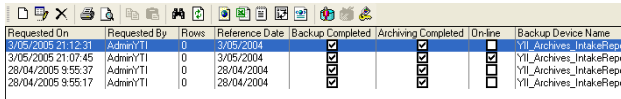
When archives are online, the data is restored into the database. To physically remove those records from the database, you must drop the online archives.

Proceed as follows to drop online archives:

- 1 Select the online archive to drop.
- 2 Right-click and point to **Drop Online Archives**:



- 3 Click **Yes** to confirm dropping the archive.
- 4 Click **OK** to confirm successful removal.



The Online checkbox is cleared. The archive is available, though.

Managing MSDE databases

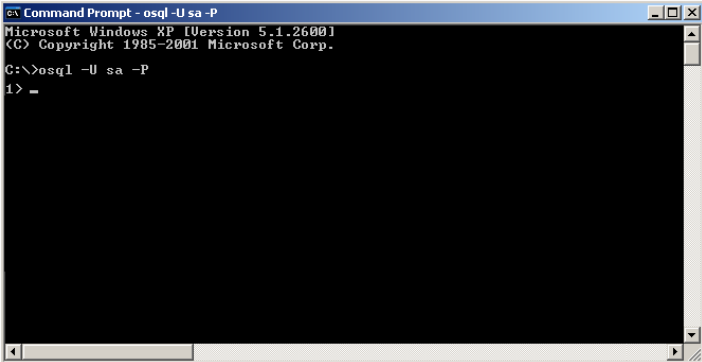
Using SQL Server terminal

The SQL Server Desktop Engine (MSDE) does not have a user interface to manage existing databases. However, a SQL Server terminal is available from `\Microsoft SQL Server\MSSQL\Binn` directory to allow users to interact with the contents of the MSDE.

Open session

To open the SQL Server terminal, proceed as follows:

- 1 Make sure MSDE is running.
- 2 Select **Run** from the Start menu and type command, press Enter.
- 3 Type 'osql -E' at the prompt when your MSDE uses NT security. Press Enter.
- or -
Type 'osql -U sa -P' at the prompt when your MSDE uses SQL security. Press Enter.
A SQL Server terminal session is started.



```
Command Prompt - osql -U sa -P
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\>osql -U sa -P
1> _
```

- 1 Type `EXIT` to close the SQL Server terminal session.

Create databases

To create a MSDE database, use the `CREATE DATABASE` command:

1 Type command and database name at the command prompt:

```
1> CREATE DATABASE mydb
```

1 Press Enter.

2 Type go at the command prompt:

```
2> GO
```

1 Press Enter.

A database named mydb will be created.

Delete databases

To delete a MSDE database, use the `DROP DATABASE` command:

1 Type command and database name at the command prompt:

```
1> DROP DATABASE mydb
```

1 Press Enter.

2 Type go at the command prompt:

```
2> GO
```

1 Press Enter.

The database named mydb will be deleted.

Backup databases

Backing up, and restoring, MSDE databases may be useful to copy databases from one server to another.

To backup a MSDE database, use the `BACKUP DATABASE` command:

- 1 Type command, database name, path and file name at the command prompt:

```
1> BACKUP DATABASE mydb TO DISK =  
'C:\Backup\mydb.bak'
```
- 1 Press Enter.
- 2 Type go at the command prompt:


```
2> GO
```
- 1 Press Enter.
The MSDE database, mydb, will be backed up to a file named mydb.bak in c:\Backup.

Restore databases

To restore a backed up MSDE database, use the `RESTORE DATABASE` command:

- 1 Type command, database name, path and file name at the command prompt:

```
1> RESTORE DATABASE mydb FROM DISK =  
'C:\Backup\mydb.bak'
```
- 1 Press Enter.
- 2 Type go at the command prompt:

```
2> GO
```
- 1 Press Enter.
c:\Backup\mydb.bak will be restored to a MSDE database named mydb.
 If `CANNOT FIND SPECIFIED PATH NAME "<PATH NAME>"` appears, create the missing directories.
- 1 To test whether the database was properly restored, type:

```
1> SELECT * FROM <Database.dbo.TableName>  
2> GO
```
- 1 Press Enter.

Using Database Management in you.trace.it

you.trace.it now contains a management console to backup, restore or drop you.trace.it databases.

Backing up or restoring does not affect the data contained in the active you.trace.it database.

Open console

To start the console, go to the **Application** menu and point to Database management.



Backup database

Proceed as follows to backup a you.trace.it database:

- 1 Click **Backup** in the console.
The following window pops up (with empty fields):

Manage Database - Backup

Database info

1. Select Available Server:
WXP-KATHLEENV
2. Enter Information to Logon to the Server:
 Use Windows NT integrated security
 Use a specific user name and password:
User Name: sa
Password:
3. Enter the Database on the Server:
IntakeReport2

Destination

Name: 20050503_IntakeReport2
Description: Backup IntakeReport2 from 20050503

Overwrite: Append to media
 Overwrite existing media

OK Cancel

- 1 Select the SQL server in the network or type '(local)' when the database is located in an instance of SQL server run by the same computer that runs you.trace.it.
- 2 Select the login method for the SQL server: Windows NT integrated security (user name and password to connect your PC to the LAN is used) or specific user name and password for the SQL server ('sa' account).
- 3 Select the database to backup.
Name and Description are completed automatically based on the name of the database.
- 4 Click **OK** to start.

Restore database

Proceed as follows to restore a backup of a you.trace.it database:

- 1 Click **Restore** in the console.
The following window pops up (with empty fields):

Manage Database - Restore

Database info

1. Select Available Server:
WXP-KATHLEENV

2. Enter Information to Logon to the Server:

Use Windows NT integrated security
 Use a specific user name and password:

User Name: sa
Password:

Restore

From device
Device name
Device path

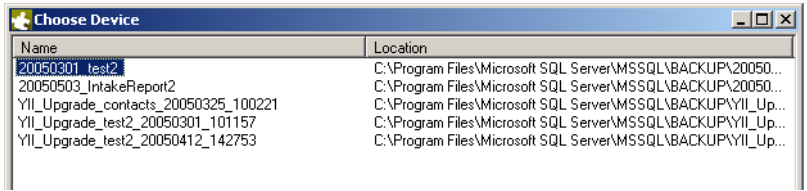
From file (must be placed in sql server backup dir)
Filename

Restore as:

OK Cancel

- 2 Select the SQL server in the network or type '(local)' when the backup is stored in an instance of SQL server run by the same computer that runs you.trace.it.
- 3 Select the login method for the SQL server: Windows NT integrated security (user name and password to connect your PC to the LAN is used) or specific user name and password for the SQL server ('sa' account).

- 4 Click ... to select the device to be restored.
The following window appears:

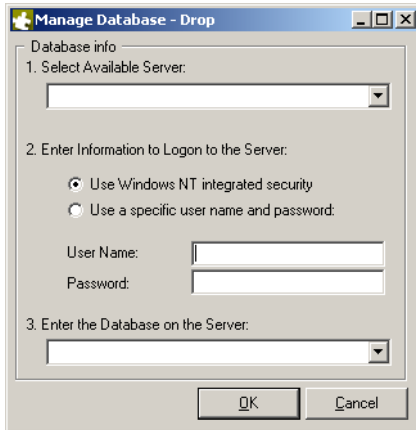


- 5 Select the device, which is a you.trace.it backup stored in the default backup directory of MS SQL Server.
- 6 Click OK to start.

Drop database

Proceed as follows to delete a you.trace.it database:

- 1 Click **Drop** in the console.
The following window pops up:



- 2 Select the SQL server in the network or type '(local)' when the database is located in an instance of SQL server run by the same computer that runs you.trace.it.
- 3 Select the login method for the SQL server: Windows NT integrated security (user name and password to connect your PC to the LAN is used) or specific user name and password for the SQL server ('sa' account).
- 4 Select the database to delete.
- 5 Click **OK** to start.