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# TM-Pro Test Management

## *User Guide*



[www.pister.com](http://www.pister.com)

Version 1.0

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## Overview

The software offers a complete system for:

- Scheduling product tests
- Maintaining historical records of all product test activities

The approach taken is consistent with those outlined in well-established quality system requirements.

## Set Up Information

Practical information is recorded during the initial test set up process. Some of the key elements include:

- Frequency of test
- Picture of test fixture and product being tested
- Target values for test requirement
- Procedure on how to test product
- Custom fields that are user defined

## Skip Holidays

The due dates for test studies can skip user identified periods. This can include weekends and specific dates during the year.

## Reporting Flexibility

The criteria for identifying the tests to be included in the selected report are user determined. Filtering and ordering the report can be based on:

- Date range or overdue
- Test Id, Program of Product Tests, Description
- User defined fields

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## Test Reports

A number of highly focused reports can be generated:

- Program list with the assigned tests
- Test detail report
- Test Schedule
- Test Due
- Test List
- Test History

## General Elements

Other useful features include:

- Password protection for the system
- Language considerations for screens and reports
- E-Mail reports
- Export reports to files (word processor, spreadsheet, adobe - pdf)

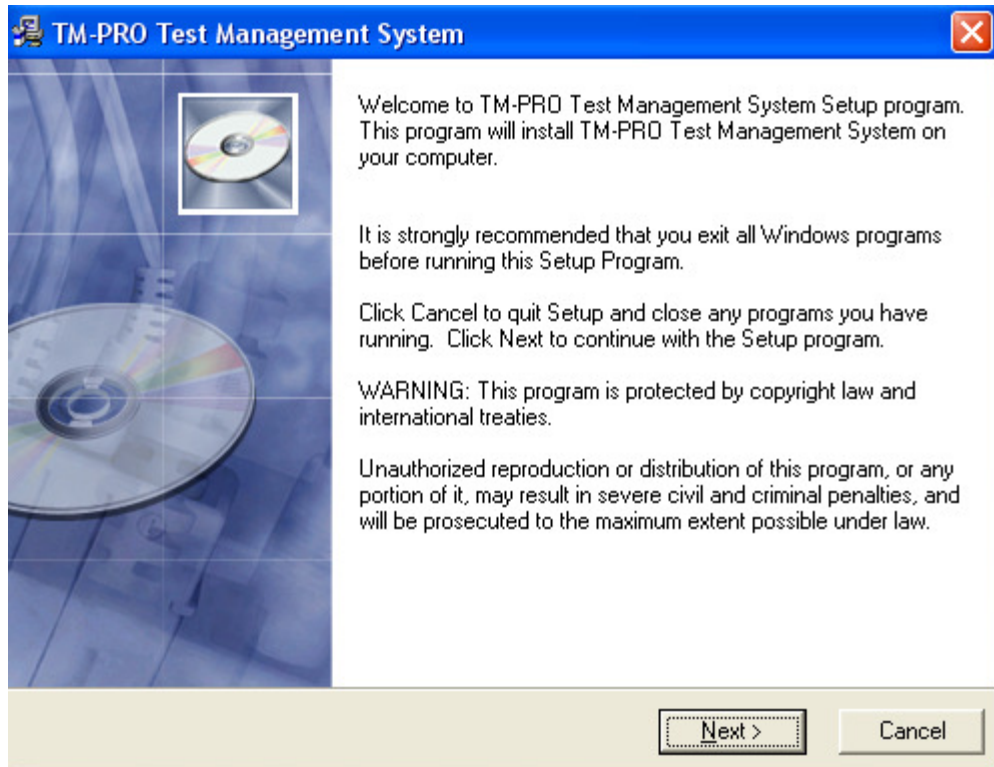
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## Procedure to Install

Place the TM-Pro Test Management software CD in the drive.

Use Windows Explorer to select the folder titled **TM-Pro Test Management** and then select the folder **TestProgram** on the CD. Double click on the file **SETUP.EXE**.

A screen similar the one shown below will appear.




It is highly recommended that all default settings be kept.

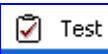
Follow the screen instructions by pressing the **Next** button until the installation is complete and then press the **Finish** button.

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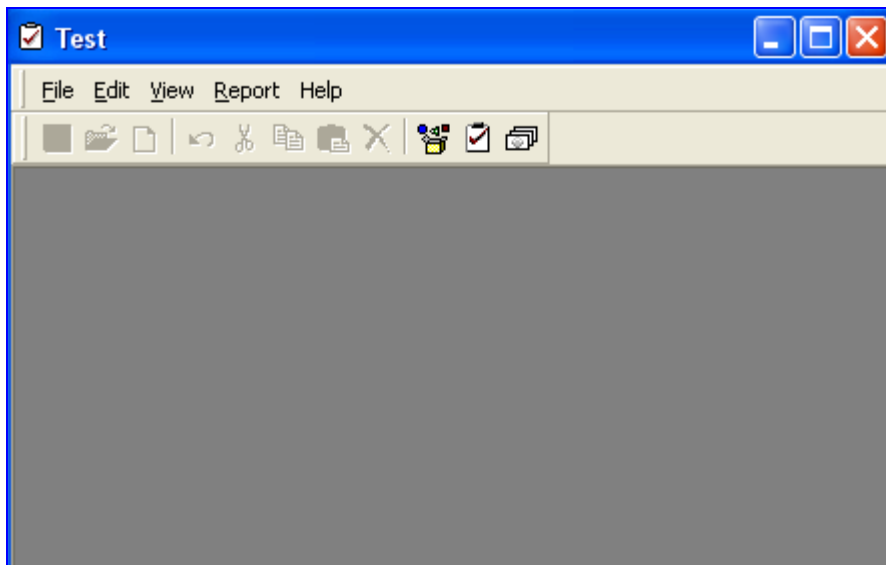
## Start Program

Click the  button on the Windows task bar.

Point to  and select the **TM-Pro** folder.

In the **TM-Pro** folder, double click on the Test Management  icon.

The main screen is similar to:

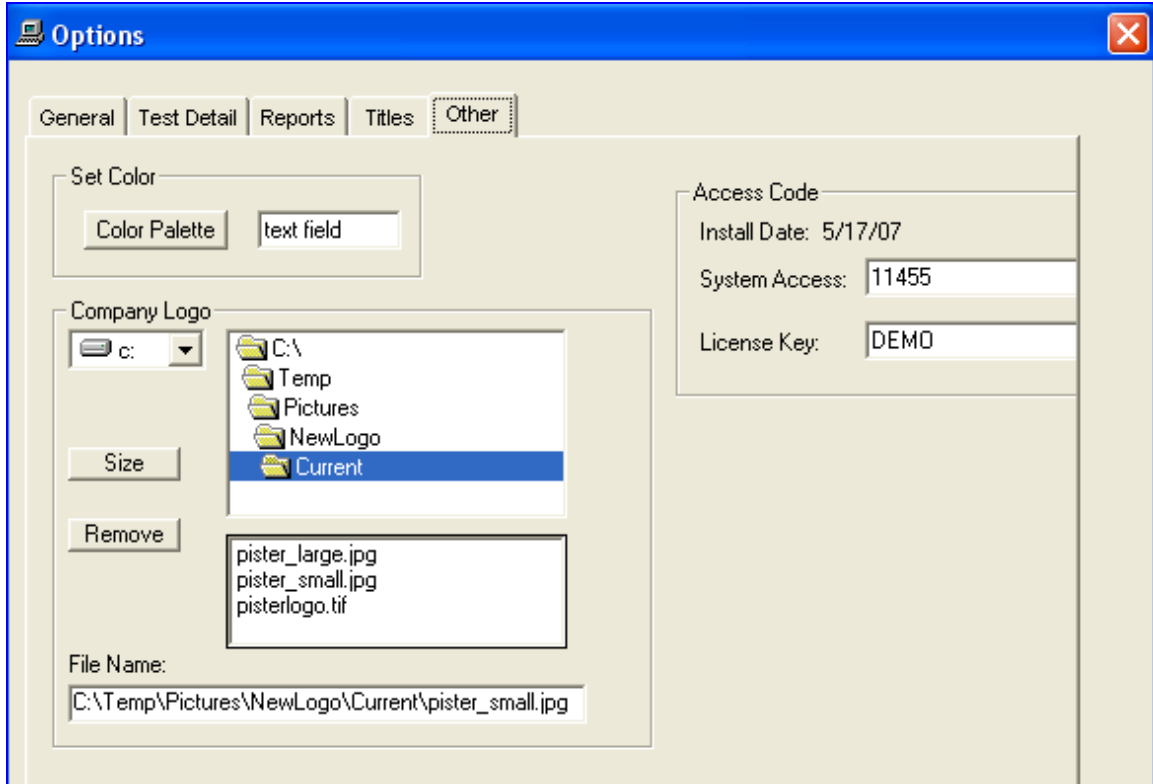


## System Access Code and License Key

The software is fully functional, however it remains a restricted (time and number of records) use version until it is unprotected.

To remove the protection, click on the **View** menu item. From the pull down menu, select **Settings**.

In the settings screen, click on the tab titled **Other**.




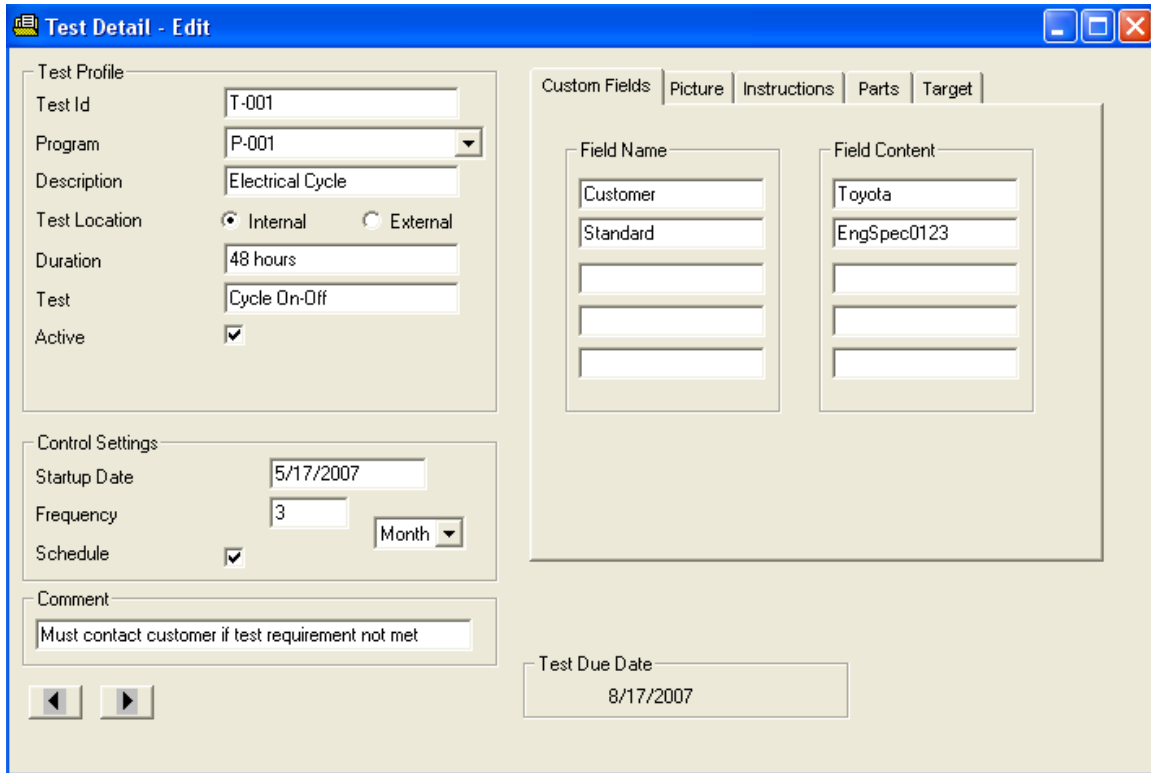
In the top segment of the access code frame an **Install Date** is displayed.

Please provide this install date to us by e-mail to **support@pister.com** or calling at **(905) 886-9470**. We will then provide you with the appropriate system access code and license key.



## Add/Edit Test Detail

To set up or edit test information, click on the menu item **File** and from the pull down menu select  **Test**



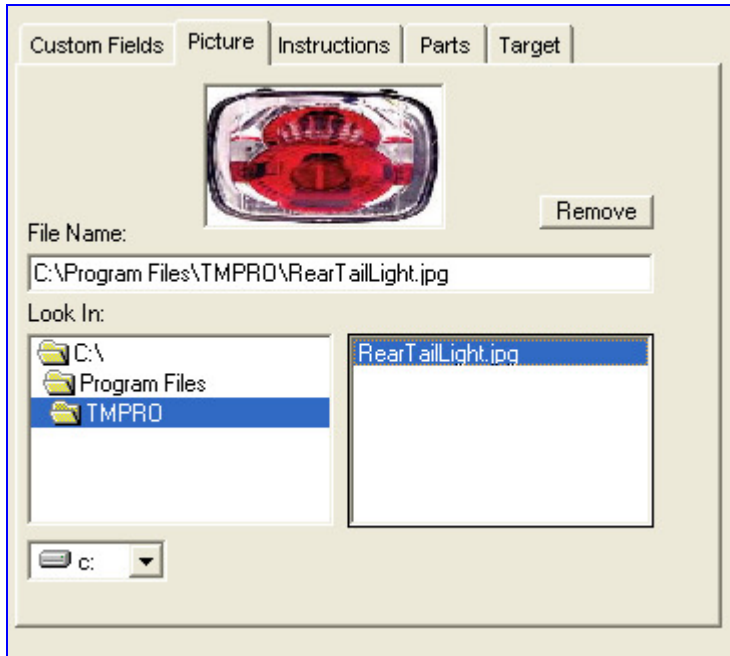
The fields in the test detail record window are described below. All field entries are optional with the exception of those shown in *italics*.

<b><i>Fields- Buttons -Tabs</i></b>	<b><i>Description</i></b>
<i>Test Id</i>	Each test requires a unique test id – can be alpha/numeric
<i>Program</i>	Grouping of various tests for a customer program
<i>Description</i>	Brief phrase for example: salt spray test
<i>Test Location</i>	Test is performed in-house or sent out
<i>Duration</i>	Length of test – for example 3000 cycles on test fixture
<i>Test</i>	Test title
<i>Active</i>	The test is active and will be included in reports like due etc.
<i>Startup Date</i>	If no test history exists, the test frequency is added to this date to produce the next test date
<i>Frequency</i>	The time period between tests – units of day, week, month or year
<i>Schedule</i>	If checked, the test will be scheduled based on the frequency
<i>Comment</i>	Free format text information
<i>Custom Fields Tab</i>	There are 5 user defined fields that can be set up either globally for all tests or uniquely for each test
Field Name	- This is the title of the field
Field Content	-This is the content of the field

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## Picture

A picture of the test fixture or product being tested can be displayed on various reports. Click on the **Picture** tab to identify the picture file information.



<b>Fields- Buttons -Tabs</b>	<b>Description</b>
File Name	Location of picture file (many graphic formats supported)
Apply Button	Save picture file information
Remove Button	Removes picture file from current test record

---

## Test Instructions

Test instructions can be unique to the test being performed or set up elsewhere at the global level so it can be assigned to multiple tests.

Click on the **Instructions** tab to set up the instruction.

Custom Fields | Picture | **Instructions** | Parts | Target

Global Instructions Link

TstInst-001 Rev 1.0 List

Details:

- Insert 3 tail lights into
- Reset timer and press the

Remove Apply

<b>Fields- Buttons</b>	<b>Description</b>
List Button	Provides a list of existing (global) instructions
Global Instructions Link	Instruction ID that will be linked with this test
Details	Instructions for testing the product
Apply Button	Finalizes the assignment of this instruction to the test
Remove	Removes the assigned instruction from the test

---

## Parts Assigned to Test

A cross reference of products that are assigned to the current test can be recorded.

To add/delete parts for the current test click on the **Parts** tab.

The screenshot shows a software window with five tabs: 'Custom Fields', 'Picture', 'Instructions', 'Parts', and 'Target'. The 'Parts' tab is selected. Inside the 'Parts' tab, there is a table with two columns: 'Part Number' and 'De'. The table has two rows: 'RTL-001' and 'RTL-002'. Below the table, there is an 'Apply' button.

<b>Fields- Buttons</b>	<b>Description</b>
Apply Button	Saves typed in part number to list of parts

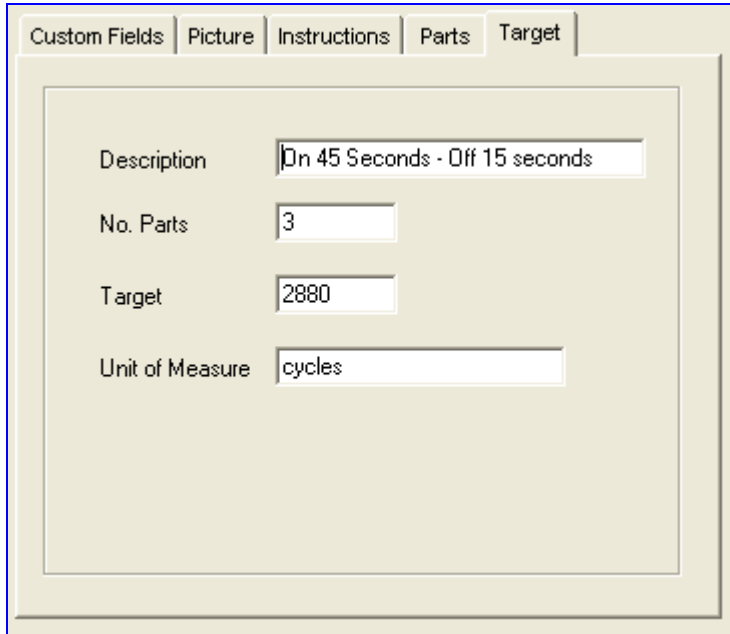
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## Test Target

The desired outcome of the test is recorded here.


As an example the minimum pull test strength on a product required by a customer would be recorded under **Target**.

Click on the **Target** tab to set up the details.



<b>Fields- Buttons</b>	<b>Description</b>
Description	Optional brief description
No. Parts	Number of parts that will be tested
Target	Desired outcome of test

## Saving Information

In order to retain all the test detail information click on the **Save**  tool bar button.

## Test Detail Report

To obtain a formatted report of the test detail click on the menu item **Report** and from the pull down click on **Test Detail Report**.

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### Test Detail

5/21/2007  
Page 1 of 1

Test Id	T-001	Description	Electrical Cycle
Program	P-001	Startup Date	5/17/2007
Test Location	Internal	Duration	48 hours
Test	Cycle On-Off		
Active	Yes	Last Test	5/17/2007
Frequency	3 Month(s)	Due Date	8/17/2007
Customer	Toyota		
Standard	EngSpec0123		
Comment	Must contact customer if test requirement not met		

Description	On 45 Seconds - Off 15 seconds		
No. Parts	3	Target	2880
		Unit of Measure	cycles

Instructions      TstInst-001      1.0

- Insert 3 tail lights into cycle fixture
- Reset timer and press the green start button

The report can be sent to an external file, e-mailed or printed.

## Test Copy

It is possible to use an existing test setup to create a new test. This avoids having to key in similar information. With the test detail window active, click on the menu item **Edit** and from the pull down click on **Test Copy**. A pop up window will appear. Enter the new test id. All the existing test detail will be assumed by the new test id.

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## Product Tests Program

It is possible to group a number of tests into a program.

This would reflect the tests that are to be performed for a customer's product over time.

Program - Edit

Program Id: P-001

Description: Toyota Model XYZ

Comment: All documentation to be forwarded to the central qa office.

Tests | Picture

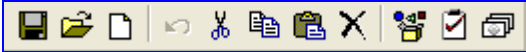
Assigned Tests	
Test Id	Description
T-001	Electrical Cycle
T-002	Weather Simulation

Fields- Buttons	Description
Program Id	Program identification
Comment	Free format memo
Test Tab	Tests that are assigned to this program
Picture Tab	Picture of product in the program












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## Tool Bar Buttons

A number of tool bar buttons are displayed at the top.



If the buttons are not grayed out then they are available for the active window.


<b>Tool Bar Buttons</b>		<b>Description</b>
 Save		Saves elements related to the current open window
 Find		Find a test or program either by typing in the id or picking from a list
 New		Clears out field contents, and allows new information to be entered
 Undo		Field contents reverts back to original content
 Cut		The highlighted text is cut and placed in windows clipboard
 Copy		The highlighted text is copied and placed in windows clipboard
 Paste		The contents of the clipboard are pasted in the active field
 Delete		Deletes the current record – it is context sensitive
 Program Detail		Advances to the program detail window
 Test Detail		Advances to test detail window
 Transaction		Advances to the transaction window where test result information is recorded

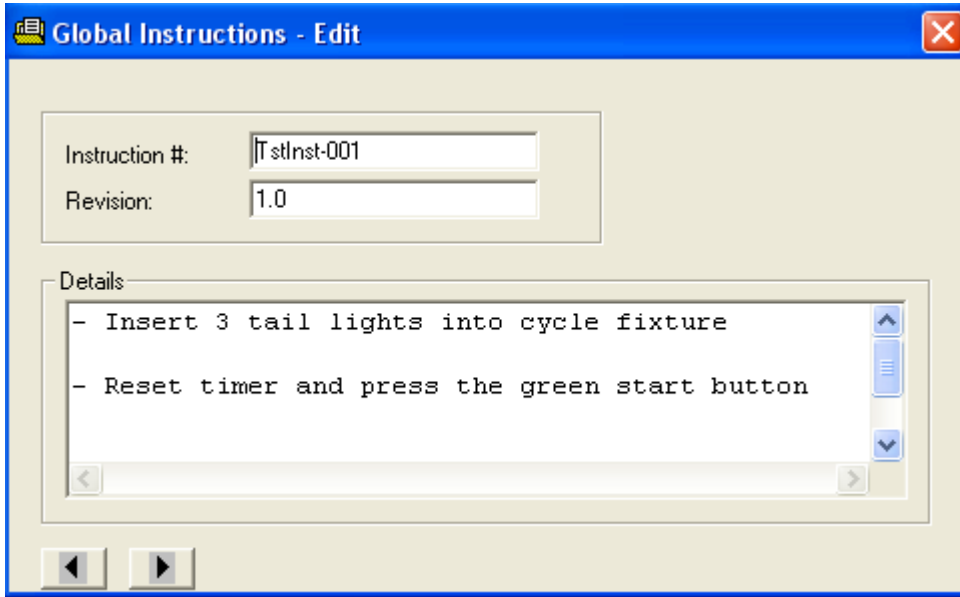


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## Test Instructions - Setup


To setup/edit a test instruction, click on the menu item **File** and from the pull down menu select **Instructions**.

Click on the **New**  button to start a new test instruction record.



The image shows a software window titled "Global Instructions - Edit". It contains two input fields: "Instruction #:" with the value "TstInst-001" and "Revision:" with the value "1.0". Below these is a "Details" section with a text area containing two bullet points: "- Insert 3 tail lights into cycle fixture" and "- Reset timer and press the green start button". The text area has vertical and horizontal scrollbars. At the bottom of the window are two navigation buttons, a left arrow and a right arrow.


<b>Fields- Buttons</b>	<b>Description</b>
Instruction #	Alpha/Numeric instruction identification
Revision	Alpha/Numeric revision level
Details	Free format text – test instructions details

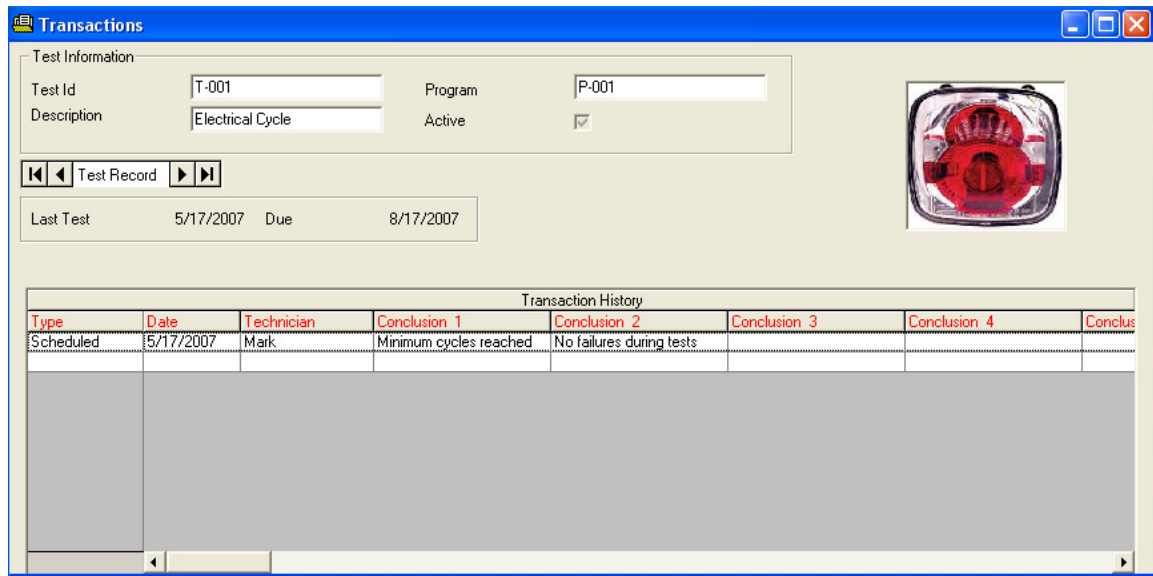
To store the test instruction information, click on the **Save**  tool bar button.

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## Transactions


The transaction system provides the mechanism to record any activity for a particular test.

Click on the menu item **File** and from the pull down select **Transactions**. An alternate method is to click on the **Transaction**  tool bar button.



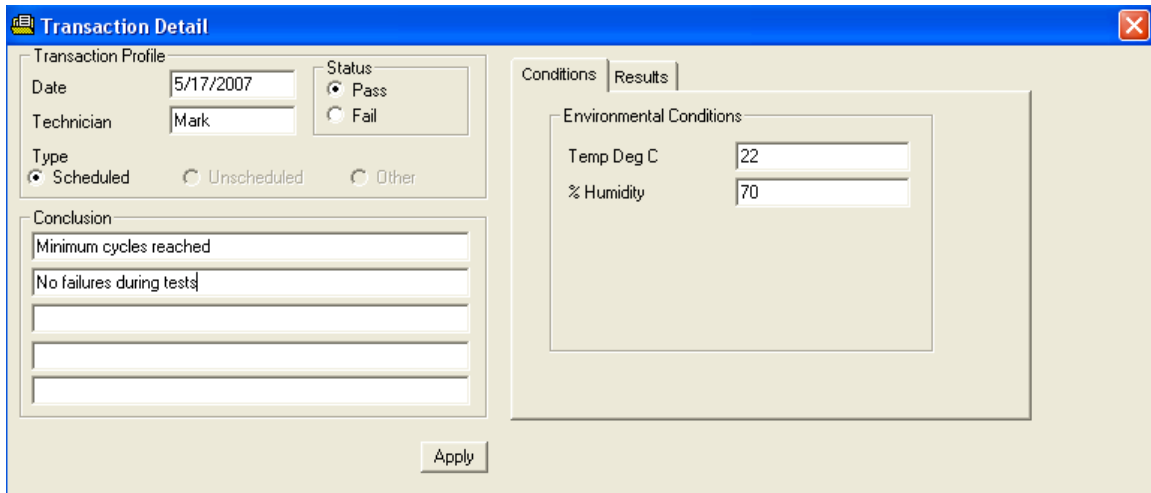
<b>Fields- Buttons</b>	<b>Description</b>
Test Information	Displays general test information – cannot be altered
Test Record	Moves forward/backward one test record at a time
Transaction History	Summary of test activities performed to date

To edit an existing transaction, double click on the desired transaction displayed in the Transaction History.

To view another Test Id - transaction, click on the **Find**  tool bar button. Double click on the Test Id desired.

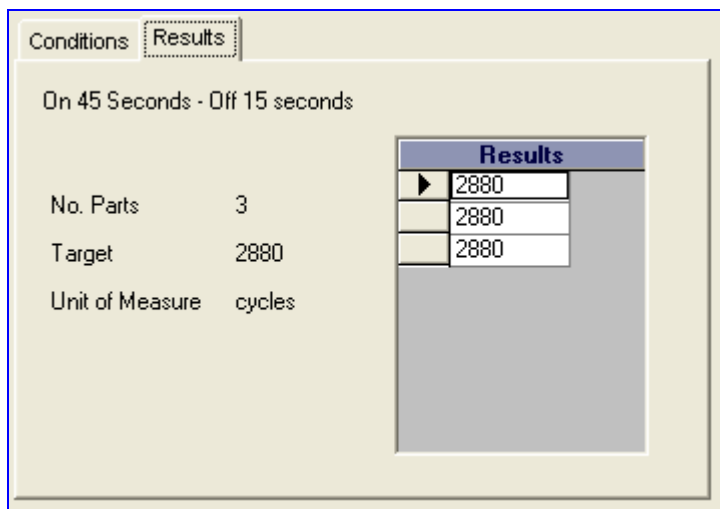
## Add Transaction

To begin a new transaction for this test click on the **New**  tool bar button.



The **Transaction Detail** window is shown with the following fields and controls:

- Transaction Profile**
  - Date: 5/17/2007
  - Technician: Mark
  - Type: ☒ Scheduled, ☐ Unscheduled, ☐ Other
  - Status: ☒ Pass, ☐ Fail
- Conclusion**
  - Minimum cycles reached
  - No failures during tests
  - (Two empty text boxes)
- Environmental Conditions**
  - Temp Deg C: 22
  - % Humidity: 70
- Buttons**: Apply



The **Results** tab is shown with the following fields and controls:

- Conditions**: On 45 Seconds - Off 15 seconds
- Results Table**


Results	
▶	2880
	2880
	2880
- Test Parameters**
  - No. Parts: 3
  - Target: 2880
  - Unit of Measure: cycles

Fields- Buttons	Description
Date	Date test performed
Done By	Person who did the calibration
Status	Result of test – pass or fail
Type	Type of transaction can be scheduled, unscheduled or other
Conclusion	Five lines of conclusions
Conditions Tab	User defined fields reflective of the environmental conditions
Results Tab	Record test result values
Apply	Save the test record

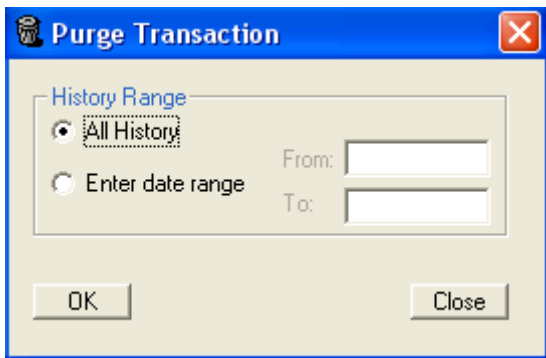
Click on the **Apply** button to save the calibration transaction detail record.

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## Delete Transaction

To delete a specific transaction, call it up on the screen and click on the **Delete**  tool bar button.

If a range of transactions are to be removed, then the purge option is more efficient. Ensure the main transaction window is active. Click on the menu item **Edit** and from the pull down, click on **Purge**.



<b>Options -Fields</b>	<b>Description</b>
All History option	Removes all transactions for selected test
Enter date range option	Removes transactions in specified From/To date range
From field	Start date for range
To field	End date for range

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## Report Options

It is possible to manipulate what is retrieved from the database prior to generating a report. For example the test due or test schedule could be filtered to include only tests for a particular date range etc.

If the data set is to include all tests, then the report options can be bypassed.

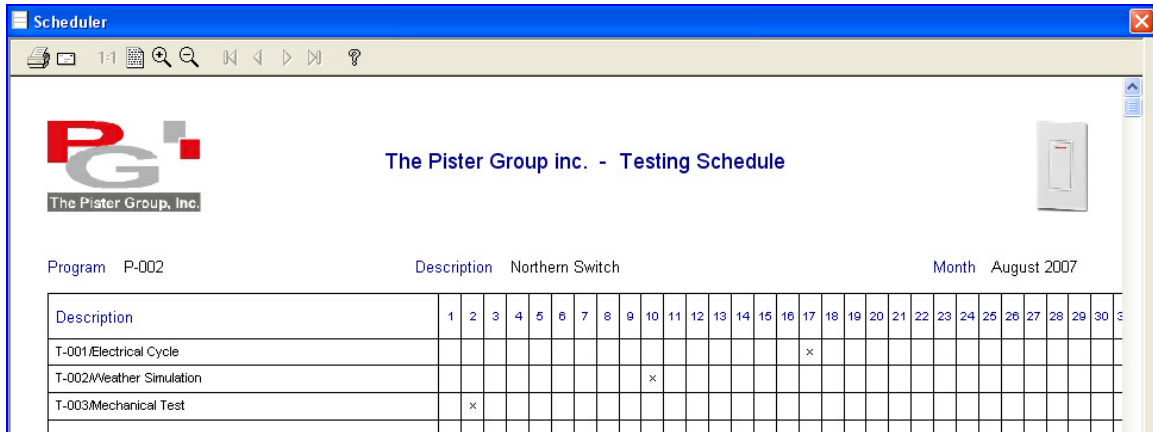
From the menu options at the top, click on the menu item **Report** and from the pull down, click on **Report Options**.

The screenshot shows the 'Report Options' dialog box. The 'Filter' tab is active, displaying a table for filtering data. The table has three columns: 'Field Name', 'From', and 'To'. The rows are labeled with field names: Program, Test Id, Description, Customer, and Standard. Below the table is a 'Pick Tests' button. At the bottom of the dialog are 'OK', 'Reset', and 'Cancel' buttons.

<b>Tab - Buttons</b>	<b>Description</b>
Filter Tab	Enter a from/to range for selected field name
Sort Tab	Sort list on desired field
Range Tab	Retrieve data set for a selected date range
Which Tab	Data set to include tests that are active or not active or both
Parts Tab	Data set to include tests for specific part(s)
Pick Test Button	Data set to include only tests selected from a list
Reset Button	Default settings restored
OK Button	Accepts all the selected report options

## Test Schedule Report

This report is a matrix of tests for a particular customer's product.

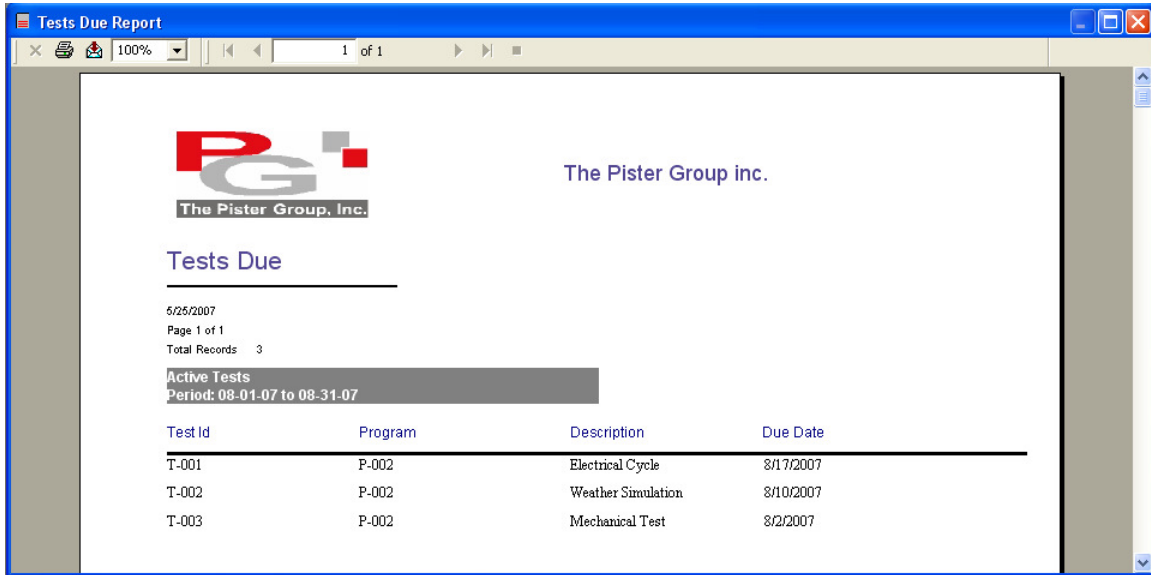




Tool Bar Buttons	Description
Print	Print the report
E Mail	Opens default mail system and attaches a .pdf file of the report
Enlarge	Enlarges report

To save the report as a .pdf file click on FILE – PDF file

## Test Due Report

This report lists all tests due.. The criteria can be as simple as those tests due currently or based on the various selection elements detailed in the report options segment.

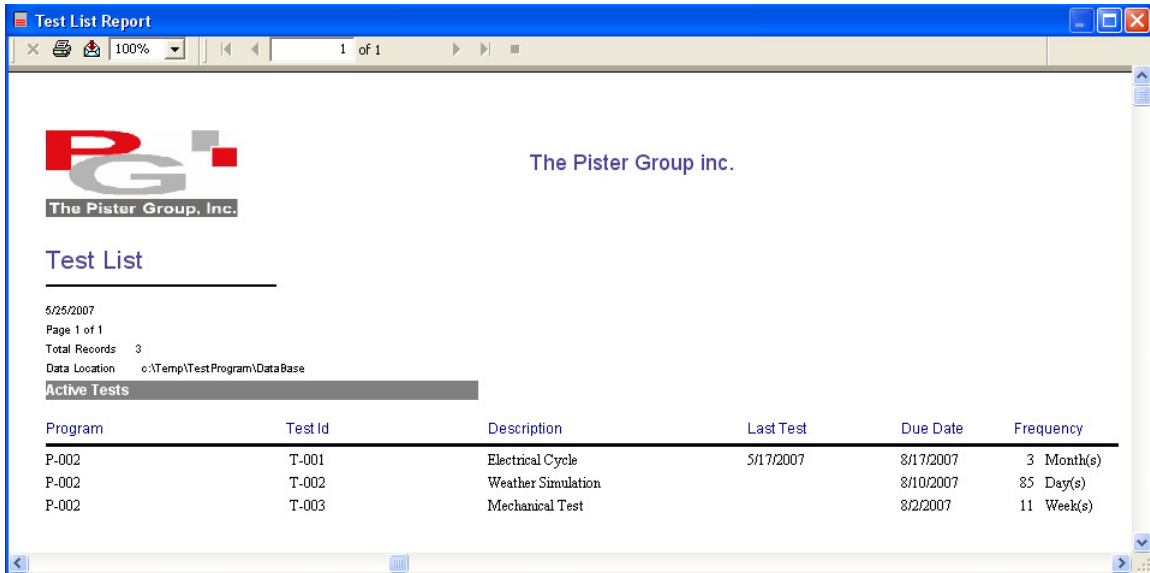


Buttons	Description
 Print Button	Prints full page hard copy
 Export Report	Send report to an external file / e-mail the report

## Test List Report

This report includes a detailed list of tests based on the selection criteria in Report Options.

The report includes last test date, next scheduled test date and test frequency.



**Test List Report**

5/25/2007  
Page 1 of 1  
Total Records: 3  
Data Location: c:\Temp\TestProgram\DataBase

**Active Tests**

Program	Test Id	Description	Last Test	Due Date	Frequency
P-002	T-001	Electrical Cycle	5/17/2007	8/17/2007	3 Month(s)
P-002	T-002	Weather Simulation		8/10/2007	85 Day(s)
P-002	T-003	Mechanical Test		8/2/2007	11 Week(s)




## Test History


This report provides a summary of all activities performed over time for a particular test.

Test History Report

1 of 1



The Pister Group inc.



### Test History

5/26/2007  
Page 1 of 1

Test Id	T-001	Program	P-002
Description	Electrical Cycle	Startup Date	5/17/2007
Test Location	Internal	Duration	48 hours
Test	Cycle On-Off		
Frequency	3 Month(s)	Last Test	5/17/2007
Comment	Must contact customer if test requirement not met		
Due Date	8/17/2007		
Customer	Toyota		
Standard	EngSpec0123		

Type	Date	Status	Technician	Conclusion
Scheduled	5/17/2007	Pass	Mark	Minimum cycles reached No failures during tests

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## Test Certificate – Transaction Detail

This report includes all the information and results for a completed test. It can also be emailed to the customer if desired.



**Transaction Detail Report**

**The Pister Group inc. - Test Certificate**

**Test Id** T-004 **Program** P-002  
**Description** Weather Simulation  
**Date** 6/5/2007 **Status** Pass  
**Technician** Bill

**Conclusion**  
No visual corrosion seen  
No discoloring occurred

**Environmental Conditions**  
Temp Deg C 25  
% Humidity 100

**Results**  
Description On continuously

## Other Reports

There a number of other reports:

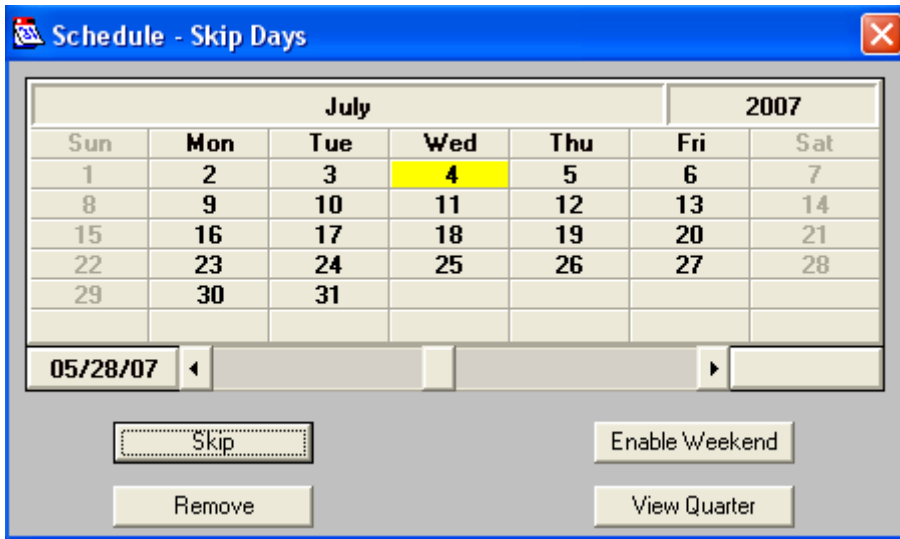
- Program List: assigned tests for a customer's product test program
- Test Detail: includes all information about the test
- Transaction Detail: information entered for a particular test session
- Test List by Part Number: list tests for various part numbers

---

## Skip Days

This feature lets you block off days such as vacation and plant shut downs so that test activity will not be due on these days.

To set up this feature, click on the menu item **View** and from the pull down click on **Skip Days**.



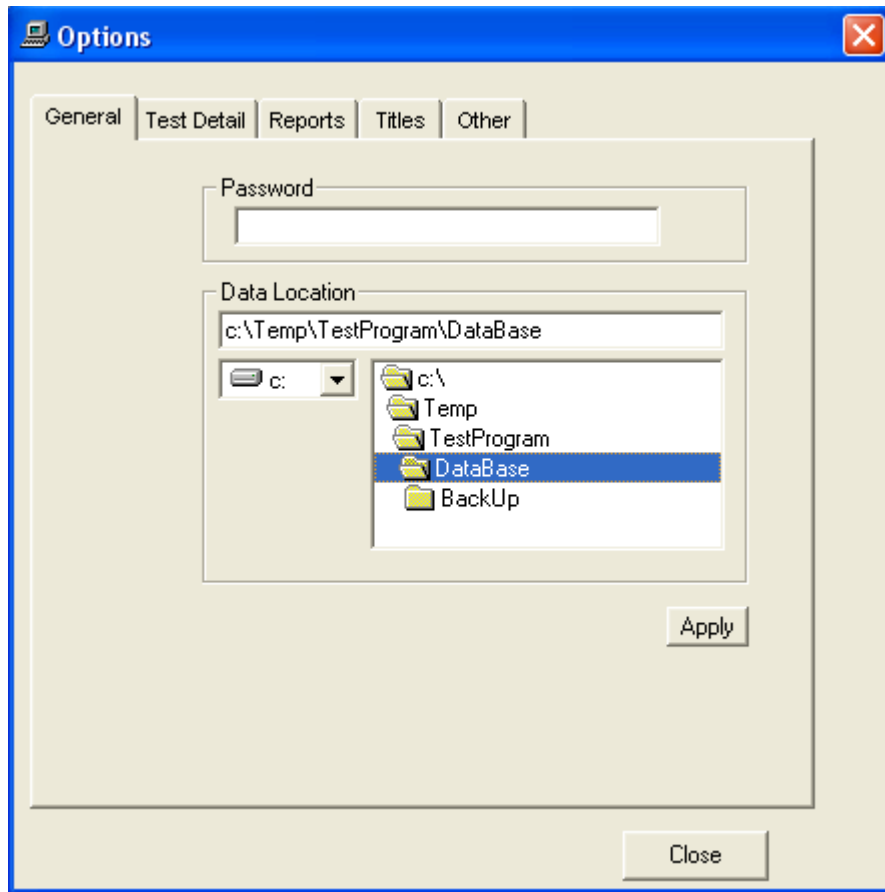
<b>Buttons</b>	<b>Description</b>
Skip	Click the day and then Skip button – skipped day in yellow highlight
Enable Weekend	Toggle between enable/disable tests on weekends
View Quarter	View a 3 month calendar
Remove	Click the day and then Remove button – return day to regular

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## General Settings

The location of the data base, optional password setup and other elements are modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **General** tab.



<b>Fields - Buttons</b>	<b>Description</b>
Password	Restricts access to test system - optional
Data Location	Identify drive and folder where data base is located
Apply Button	Saves the settings

## Test Detail Settings

The default settings for items such as the type of instruction, test frequency, custom field titles and number of environmental conditions to record are modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Test Detail** tab.

The screenshot shows the 'Options' dialog box with the 'Test Detail' tab selected. The 'Defaults' section on the left includes radio buttons for 'Global' (selected) and 'Stored with Test', a 'Frequency' spinner set to 1, a 'Unit' dropdown set to 'Month', and an 'Environmental Conditions' section with a 'Number of conditions (Max 5)' spinner set to 2. The 'Custom Field Names' section in the middle has five text boxes, the first two containing 'Customer' and 'Standard', with an 'Apply' button below. The 'InActive Reasons' section on the right has a list box with 'Reason' as the header, containing 'Sent Out' and 'Obsolete', with 'Delete' and 'Apply' buttons to the right. A 'Close' button is at the bottom center.

<b>Fields - Buttons</b>	<b>Description</b>
Instructions	Generic global or unique procedure for each test
Frequency	Period between tests
Frequency Unit	Days, week, month, year
Environmental Condition	Number of environmental conditions to record for a test
Custom Field Names	Titles for each custom field, applied to all tests
Inactive Reasons	Various reasons why a test may become inactive
Apply Button	Save test detail settings

## Report Settings

The default settings for items such as report header, how due dates are displayed and other elements are modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Reports** tab.

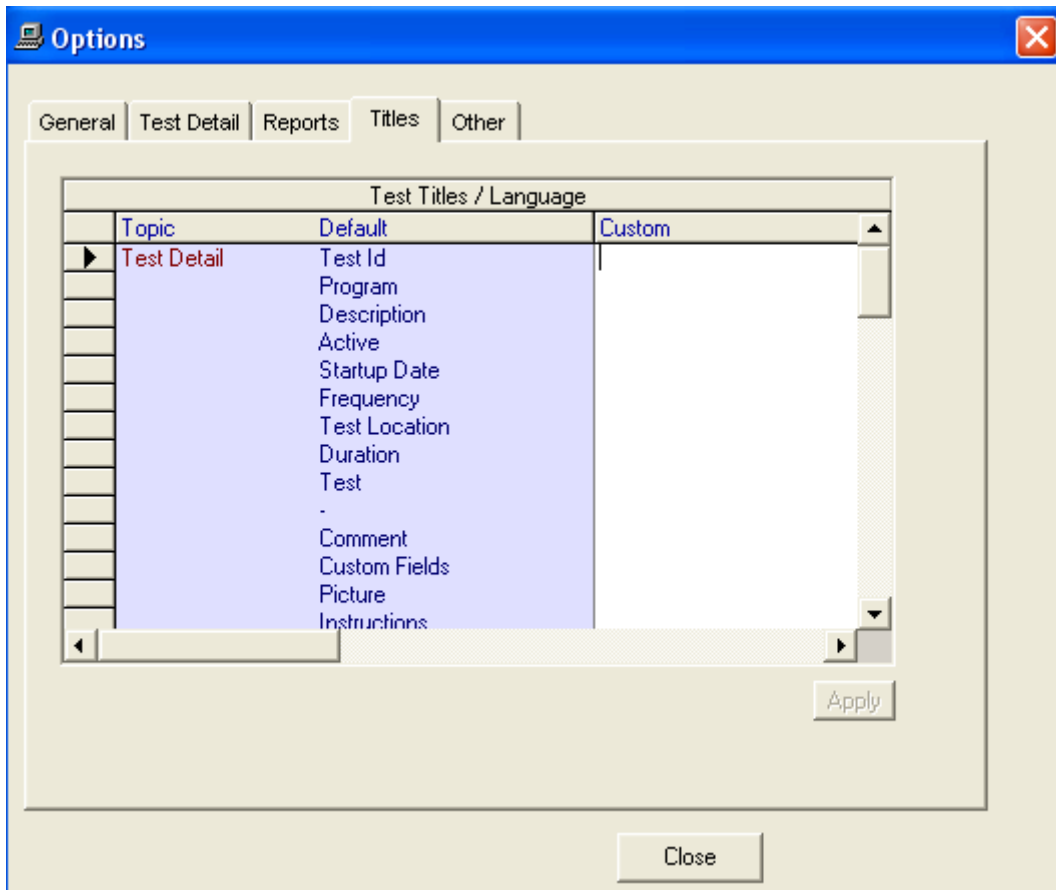
Fields - Buttons	Description
Report Header	Typically company name – will appear on all reports at top
Display Due Date	How date is shown: full date or just month/year
Report Options	Retain filter settings or reset settings each time
Form Numbers	Form numbers can be assigned to various reports
Test Certificate	Free format text test certificated declaration
Apply Button	Saves report settings

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## Language Settings

The text labels displayed on various windows can be modified (different language) by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Titles** tab.



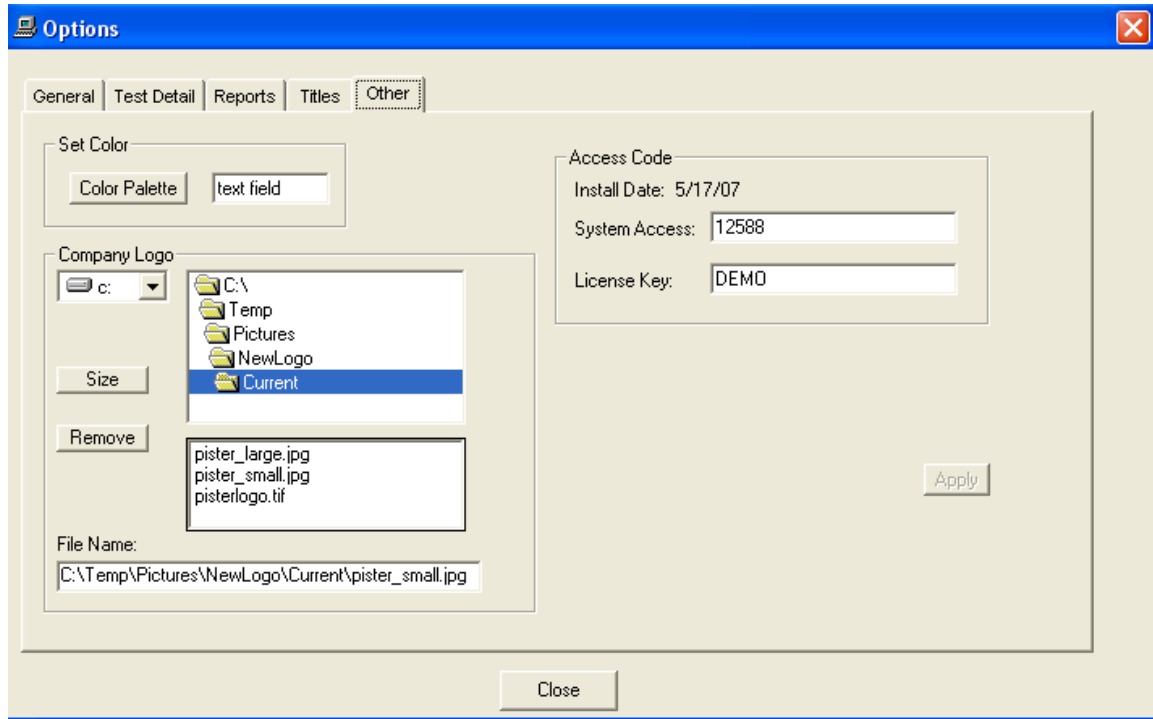
Fields - Buttons	Description
Custom	Replaces current label title with user entered label
Apply Button	Saves title label settings

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## Other Settings

Access code, text color and other elements can be modified by clicking on the menu item **View** and from the pull down **Settings**.

Click on the **Other** tab.



Fields - Buttons	Description
Color Palette	Changes the text color
System Access	Code value determines the level of access
License Key	Unlocks the software for full rights
Company Logo	Identify location where company logo file is stored
Apply Button	Saves the settings



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## Compact Data Base

When tests, programs or transactions are deleted, they are only marked as deleted but remain physically in the database. The compact option will compress the database and physically remove any deleted tests, programs and transactions.

To use this feature, click on the menu item **File** and from the pull down click on **Accessories – Compact**.

The compact option should be used every few months to clean up the database and **not** each time you delete a test, program or transaction.

## Add Field to Data Base

When we modify elements of the program, the database tables/fields may be affected. The add field option will add the necessary information to the database.

To use this feature, click on the menu item **File** and from the pull down click on **Accessories – Add Field**.

You do not need to run this option unless instructed to by us.