

Basic Tutorials

How to manage calibration of equipment and tools?

The steps for the calibration of tools (e.g. torque wrench) or equipment (variable power supply or multimeter) are similar and described on the next text:

Create a maintenance plan source WO for the calibration of the tool by creating a work request.

Create Work Request

Target FL

PLANT A ▾

Choose FL... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Choose Above... ▾

Production Plant A

choose...

choose...

choose...


choose...


choose...

choose...

choose...

choose...

**Created By**
John McCann

**Creation Date**
2016-06-01 05:29 PM

WO Type
OTHER ▾

WO Priority
P3 - Normal ▾

Summary Should Be Short, But Precise. Appears On Work Order Lists.
[CAL] 1Y Calibration Routine for Torque Wrench A

Full Description Note All Observations, Symptoms And/ Or Any Tests Already Performed.
Send to external calibration provider.

4962 chars left

Re-enter the work request you created above in edit mode and click the “Convert to MPlan” link on the bottom left.

WO #34152 Created

What would you like to do next?

- Create another
- Display Current Work Request
- Go to your dashboard

Operations

Printer-friendly version

View WO Log

Convert to MPlan

On the create maintenance plan screen, set this as a “time based” plan (this is the default option) and set the start date and the frequency at which the job should come out (1 year on this example). Ensure the “Delete source work order” option is checked as we have done this source work order solely with the purpose of creating

Basic Tutorials

a maintenance plan and there's no need to keep this source active on the system. Click the "Create Maintenance Plan" button at the bottom.

Source is WO #34152 - [View](#)

Summary: [CAL] 1Y Calibration Routine for Torque Wrench A

Enter General Information

Enter Description Max 100 Char

[CAL] 1Y Calibration Routine for Torque Wrench A

Generate in

☒ active or

☐ paused mode

☒ Delete source work order (?)

Select Trigger Method

☒ Time based

☐ Counter based

☐ Time and counter based (whichever comes first)

Time Trigger Options

Start Date

1 Jun, 16

☐ Generate once on start date

☐ Generate weekly every

☐ Mon

☐ Fri

☐ Tue

☐ Sat

☐ Wed

☐ Sun

☐ Thu

☐ Generate on 7-day, weekly cycles

Enter week cycle (default = 1)

☐ Generate monthly

on day

1

of every

1 month(s)

☒ Generate yearly every

1 year(s)

End Date

Leave blank for no end date.

It is possible to leave this task like this. After all, the work order is going to be issued regularly in 1-year intervals to do this job. We can however make things a little more organized by linking the actual tool to be calibrated to the source WO and have that come out automatically each time. To link the tool, go back to the maintenance plan in edit mode and then click the "View" link to open the source work order in edit mode (will open on another tab).

Edit Maintenance Plan

To add recommended tools and/ or equipment and/ or tasks

Source is WO #34153 - [View](#)

Summary: [CAL] 1Y Calibration Routine for Torque Wrench A

Basic Tutorials

Maintenance Plan #1371 Saved

What would you like to do next?

[View maintenance plan](#)

[Edit maintenance plan](#)

[Back to maintenance plan list](#)

[Go to your dashboard](#)

FOR TOOLS: Go to the “Tools” sub-tab on the “Add or Edit Information” tab and write the first few characters of the tool to calibrate (in this case an electronic torque wrench). Click the “Add” button to add this tool to the list needed by this work order and save the work order. This tab can now be closed.

View Information

Add or Edit Information

Reports

Parts

Files

Tasks

Tools

Deadline

Import Tool (Enter Brand or Model)

Qty

Add

wrench

1

[249] Gear Wrench-18pc 1/2in Drive Metric Socket Set (RS #7687027)

[1599] Starrett-Solid -Rod Inside Micrometer (124MB)

[1658] Stanley-Pipe Wrech 14inches (G60)

[1676] BAHCO- Electronic Torque Wrench (G66)

[1679] Japan-Metric Tap and Die Wrench Set (G69)

[1699] Rennsteig-Imperial Screw Extractor set (RS# 460-9516)

[2693] Gear Wrench-Gear Wrench 20, 21, 22, 24mm Ratchet Spanner Double Ended, 11.42in Length

FOR EQUIPMENT: Go to the “Parts” sub-tab on the “Add or Edit Information” tab and write the first few characters of the equipment to calibrate (in this case a 48V power

Basic Tutorials

suppkye). Click the “Add” button to add this item to the list needed by this work order and save the work order. This tab can now be closed.

View Information

Add or Edit Information

Reports

Parts

Files

Tasks

Tools

Deadline

1: Enter part ID, brand, description or model

supply

[290] Man Shing-Mast Cylinder Case Stainless Steel...

[448] SIEMENS-24V:40A Power Supply (6EP1437-3BA00)...

[539] Siemens- 24V/20A POWER SUPPLY-FW only (6EP14...

[540] Mean Well- 48V Power Supply (PSP-500-48,PSP-...

[542] Siemens - 24V:10A Power Supply (6EP1334-3BA...

Results

Status

Stored

229

In Storage

Qty

1

Go to the maintenance plan search console to confirm the maintenance plan was created successfully.

To check the calibration history of the tool in question, it is only necessary to filter the maintenance plan on the work order search console (in this case “MPlan 1371”). All work orders issued by that maintenance plan will be listed, effectively giving the calibration history of the tool.

Summary, Description & ID

☐ Exclude if

Summary Contains:

MPlan: 1371

Description Contains:

WO#

Plant/ Dpt & FL

Summary

☐

34154

PLANT A/ MTC

[MPlan: 1371]
[CAL] 1Y
Calibration
Routine for
Wrench A

Basic Tutorials

FOR TOOLS: Opening each work order will also show the tool to be calibrated for

View Information

Add or Edit Information

Description	Reports (0)	Parts (0)	Tasks(0)	Tools (1)	Costs														
<table><tr><th>ID</th><th>Brand</th><th>Model</th><th>Serial #</th><th>Qty</th><th>Approval</th><th>Request ID</th></tr><tr><td>1676</td><td>BAHCO</td><td>Electronic Torque Wrench (G66)</td><td></td><td>1</td><td>mplan</td><td></td></tr></table>						ID	Brand	Model	Serial #	Qty	Approval	Request ID	1676	BAHCO	Electronic Torque Wrench (G66)		1	mplan	
ID	Brand	Model	Serial #	Qty	Approval	Request ID													
1676	BAHCO	Electronic Torque Wrench (G66)		1	mplan														

extra control.


It is also possible to add several tools to the maintenance plan source work order to calibrate a group of tools instead of having one work order for each tool to be calibrated.


FOR EQUIPMENT: Opening each work order will also show the equipment to be calibrated for extra control.

View Information

Add or Edit Information

Description	Reports (0)	Parts (1)	Tasks(0)	Tools (1)	Costs
-------------	-------------	-----------	----------	-----------	-------

ID	Qty	Brnd	Mdel	Date	By	Status	Approval	Rqst ID
540	1	Mean Well	48V Power Supply (PSP-500-48,PSP-600-48)	2016-06-01 07:27 PM	John McCann	-	-	

 - Denotes a maintenance plan recommendation only. No stock movement is recorded.

It is also possible to add several equipment items to the maintenance plan source work order to calibrate a group of equipment instead of having one work order for

Basic Tutorials

each item to be calibrated.

For equipment and tools, it is possible to keep a record of the calibration certificates by linking those documents either to the equipment or tool page (preferable) or to the work order used to trigger the calibration service.

Properties

Financial

Inventory


Docs

Found a total of 2 files.

0 items selected

ID	Name	Added by	Added	
7214	stuff.txt	John McCann	2016-06-01 21:24	<input type="checkbox"/>
7213	pr_po.txt	John McCann	2016-06-01 21:24	<input type="checkbox"/>

Showing : 2



Permitted file types: gif | jpg | png | txt | doc | docx | pdf | xls |xlsx | zip; Maximum file size: 2MB

Unique solution ID: #1086
Author: commacmms
Last update: 2016-06-05 08:05