## 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		<b>()</b>		WO Type OTHER ~
PLANT A ~	Production Plant A			WO Priority P3 - Normal
Choose FL ~	choose	Created By	Creation Date	
	6110030	John McCann	2016-06-01 05:29 PM	
Choose Above ~	choose	Summary Should Be Short But Precise. Appears	On Wark Order Lists.	
Choose Above ~	choose	[CAL] 1Y Calibration Routine	for Torque Wrench A	
Choose Above ~	choose	Full Description Note All Observations. Sym	plams And/ Or Any Tests Already Performed.	
Choose Above V	choose	Send to external calibration p	rovider.	
Choose Above ~	choose			
Choose Above ~	choose			
Choose Above ~	choose			
	00056			
Choose Above ~	choose			

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	Operations
What would you like to do next?	Printer-friendly version
<ul> <li>Create another</li> <li>Display Current Work Request</li> <li>Go to your dashboard</li> </ul>	View WO Log Convert to MPlan

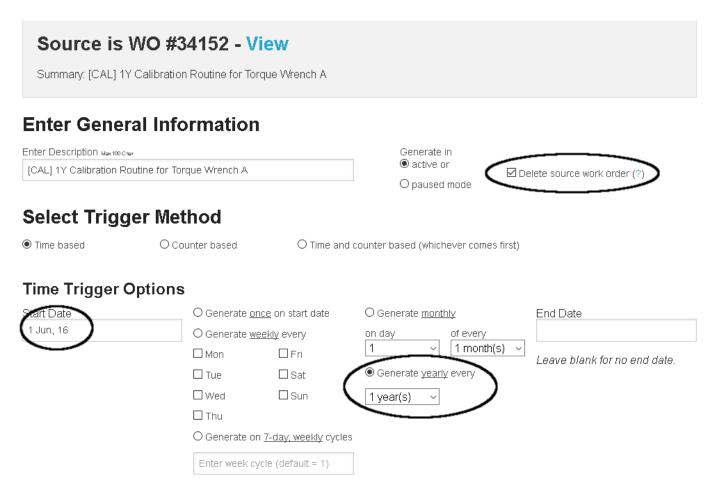
On the create maintenance plan screen, set this as a "time based" plan (this is the default option) and set the start date and the frequency at which the job should come out (1 year on this example). Ensure the "Delete source work order" option is checked as we have done this source work order solely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

Page 1 / 6

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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.



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 I
	To add recommended tools and/ or equipment and/ or ta
	Source is WO #34 53 - View
	Summary: [CAL] 1Y Calibration Routine for Torque V
Page 2 / 6	macmms.com>   2024-05-20 20:15

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### 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.

Vie	w Informa	tion	Add or Ec	lit Informat	ion											
F	Reports	Parts	Files	Tasks	Tools	Deadline										
I	mport To wrench	ol (Ente	r Brand or	Model)			Qty 1		Add							
	[1599	] Sta	rrett-So	olid -Ro	d Insi	Drive Met de Microm nches (G60	eter (1		`	6#76	8702	7)				
	[1676	] BAH	ICO- El	ectroni	c Torq	ue Wrench	(G66)									
	[1679	] Jap	an-Met	ric Tap	and D	ie Wrench	Set (G	69)								
	[1699	] Ren	insteig-	Imperi	al Scr	ew Extract	or set	(RS#	460-9	9516	)					
MMS	[2693 Lenat	-	ar Wren	ch-Gea	r Wre	ench 20, 21	, 22, 2	4mm	Ratch	net S	Spann	er D	ouble	e Ende	∋d, 11	<b>4</b> 2in

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

Page 3 / 6

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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.

ew Informa	ition A	Add or Ed	it Informatio	on					
Reports	Parts	Files	Tasks	Tools	Deadline				
1: Enter	part ID	, brand,	descripti	on or	model	Results	Status	Stored	
supply			1435 - 6 91	maci		229	In <u>_Storage</u> _	Qty 1	
	[290] Man Shing-Mast Cylinder Case Stainless Steel								
[448]	[448] SIEMENS-24V:40A Power Supply (6EP1437-3BA00)								
[539]	[539] Siemens- 24V/20A POWER SUPPLY-FW only (6EP14								
[540]	[540] Mean Well- 48V Power Supply (PSP-500-48,PSP								
[542]	Sieme	ens - 2	4V:10A	Powe	er Supply (	6EP133	4-3BA		

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.

	w	/0#	Plant/ Dpt & FL	Summary
Summary, Description & ID	□ 34	4154	PLANT A/ MTC	[MPIan: 13 [CAL] 1Y Calibration Routine for
Exclude if				Wrench A
Summary Contains: MPlan: 1371				
Description Contains:				

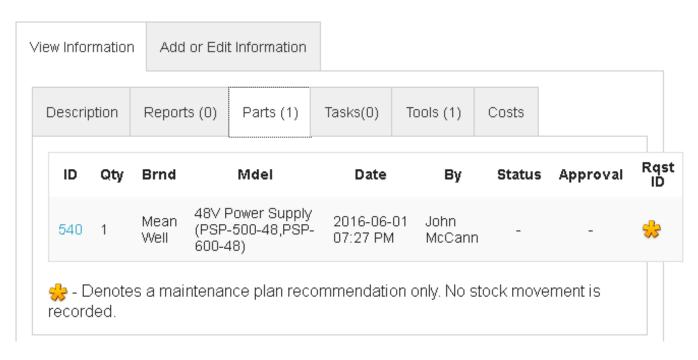
FOR TOOLS: Opening each work order will also show the tool to be calibrated for

w Information	Add or Edi	t Information				
Description	Reports (0)	Parts (0)	Tasks(0)	Tools (1	) Costs	
ID Brai	nd M	odel	Serial #	Qty	Approval	Request ID
1676 BAH	CO TO VVI	ectronic rque rench 66)		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.



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 Page 5 / 6

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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.

Financial	Inventory	Docs		
' 2 files.				0 items selected
Name	Added by		Added	
stuff.txt	John McCa	nn	2016-06-01 21:24	
pr_po.txt	John McCa	nn	2016-06-01 21:24	
2				
Permitted file	types: gif jpg p	ng txt do	c   docx   pdf   xls   xlsx   zip; Maximum file	: size: 2MB
	2 files. Name stuff.bxt pr_po.txt 2	2 files.       Name     Added by       stuff.txt     John McCar       pr_po.txt     John McCar	Name     Added by       stuff.bxt     John McCann       pr_po.txt     John McCann	Image: Principal stuff.txt     Added by     Added       pr_po.txt     John McCann     2016-06-01 21:24

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