



PENTAGON 2000 SOFTWARE

Tool and Equipment Calibration Management Module

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TITLE:	Tool and Equipment Calibration Management Module					
PART:	Material Management					
MODULE:	Tool and Equipment Calibration Management ModuleBUILD8.5.5					
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	REVISION:	00			
APPROVED BY:	Vice President, Operations, Pentagon 2000	EFFECTIVE DATE:	02/22/2013			

Purpose

The Pentagon 2000 Tool and Equipment Calibration Management Module enables identification and tracking of the periodic calibration requirements for tools and inspection requirements for equipment.

- Prevents tools and equipment for which calibration or inspection intervals have been identified from being allowed to be issued for use on component or maintenance work orders.
- Enables reporting to identify tools and/or equipment where calibration/inspection is coming due/overdue.
- Stores calibration/inspection results history, to include the detailed results of each test required by the calibration/inspection.
- Stores the check out and check in history of each tool.
- Stores the purchase order (calibration, repair, servicing), shipping, and receiving history for each tool aor piece of equipment.

Overview

This procedure outlines the steps for identifying tools requiring calibration, equipment requiring inspection, and the intervals associated with each.

Required Modules/Features

- Pentagon 2000 Core
- Tool and Equipment Calibration Management Module
- Barcoding (for advanced functionality)



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Procedure

1. Calibrated Tool Setup (in Parts Master File)

Identify that particular part numbers should be considered a tool and requires periodic calibration.

a. From the **Main Menu** screen, left-click the **Inventory** button.



b. The Partnumber search window will appear.

Search On : P/N Loc X-Ref SertH BOM Cap Ext Start With : MFG : All Category : All P/N Type : All Eligibility : All Max Search Result Lines : 50							
Drag a column header h Partnumber	ere to group by	that column	NSN	MIL	MFG	Bu	Qty in Stock UM
#1 KLX-135 GPS/COM		INTERFACED INTO KCS	120719			Bur	1,142 EA
#2 KLX-135 GPS/COM		STAND ALONE, INCLUE				Bu	2 EA
0-132-002700000		TOGGLE	5294-98-098-0980	MS21443	08903	Buy	22,585 EA
0-132-002700000		Fastener				Bu	1 EA
0-737×1-01241B8		SEAL			F6137	Bu	1,497 EA
00-12695-01		CORE			0040	Bų	5 EA
00-12700-01		CORE	8010122-1212	11-22-33	13636	Bu	3 EA
00-200-1462		WASHER			7158	Bu	27,732 EA
00-200-1462P		WASHER-PLATED				Buj	110 EA
00-200-1472		FILTER			F6137	Bu	1,172 EA
00-200-415		TAPE	8010-21-331-1313	DJ1004	F6137	Bu	136 EA
00-6759		CAPSULE	8080-80-808-0800		F5341	Bu	2,174 EA
000100000		24				n	2 54

c. Select the appropriate part number (left-click the line within the search window and left-click OK; or double-click the line within the search window).



d. The **Partnumber** window will appear.

💓 Partnumber : [49704-87]	TORQUE WRENCH			- • •
Add Edit Del Prev	→ III 🛣 🟠 Next Hist XRef W/H	Ordr BOM Opt S	K √ ∑ rch ⊆ncl OK Close	
P/N : 49704-87	Rev :	NSN :		
Desc : TORQUE WRENCH		MIL :		
Stock General Sell Prices	Costs Exchanges Measures	Extended Info Time Con	trol Eligibility Image	
		· · ·	Stock Levels	
P/N : Not Superseded	*	Hold 🗌 Note 💡	Min Qty : 0	
	Cert :	Alert 🗌 Note ଢୁ		
🕒 MFG :	Cert.	Obsolete : Note 🔉	Max Qty : 0	
Stock UM : EA Conc	I : NE Class :	Warranty:	Opt Qty : 0	
Out Bound Stock	Physical Stock	Qty Available	In Bound Stock	
Open SO/WO	In Stock 2	Stock: 2	Open P.O. 0	
Reserved 0	Internal Use 0	ToSell: 2	Prcss/MFG 0	
Booked 0	Consigned 0	Uncommitted P.O.	OH/Repair 0	
Claims 0	QA/Inspc 0	Consumption Analysis	Open RMA 0	
Cores Due 0	Transport 0	Memo1 ©	Cores Due 0	
	Quarantine 0	Memo 2 🌚		

- e. Left-click the Edit button in the Partnumber window toolbar.
- f. Left-click the **General** tab.

🝠 [Editing] Partnumber : [497	704-87] TORQUE WRENCH		
	→ III 🛣 GA	H Ordr BOM Opt Srch Cncl OK Close	
P/N : 49704-87	Rev :	NSN :	
Desc : TORQUE WRENCH		MIL :	
Stock General Sell Prices	Costs Exchanges Measure	es Extended Info Time Control Eligibility Image	-
		P/N Indicators	
Category :	·	Electrostatic : Expendable : Publish : 🔽	
		Haz Mat : Rotable (Core) : Time Control : Repairable : Stolen : Airworthiness :	
P/N Type : STK .	 STOCK ITEMS 	ITAR : Military : Dual-Use :	
Sales Line Type : 01 💌 01 - I	Inventory Item	RoHS Compliance :	
P.O. Line Type : 01 💌 01 - I	Inventory Item	ATA Chapter :	
Asset Type	Tracing	Publications	
C Stock Item	C Lot Trace	ତୁ Applications ତୁ Manuals ତୁ Drawings	
Tools	C Serialized - Multi	Q Bulletins Q Directives	
C Equip/Machine	Serialized - Unique	Part of a Match Set	
	(• Senalized - Unique	Code : Non	
	Serials	Desc : Non	

- i. Asset Type group box Ensure the radio button to the left of the "Tools" label is selected.
- ii. **Tracing** group box Ensure the radio button to the left of the "Serialized Unique" label is selected.
- iii. Time Control check box Ensure the check box is marked as "checked".



g. Left-click the Time Control tab.

Add Edit Del I	↓ → Ⅲ Prev Next His		Drdr BOM	Opt Srch		Close		
/N : 49704-87		Rev :	NSN :					
sc : TORQUE WRENC	н		MIL :					
ock General Sell Prid	ces Costs Exch	anges Measures E	xtended Info	Time Control	Eligibility I	mage		
Time Control			Eactor:	s/Formulas	1			
Shelf Life :		·		dard Scopes	-			
Sales Warranty :		·		OR			-	
OH/Repair Warranty :		<u> </u>	Tolerance	, OR			•	Tolerance
Calibrate Every :	1 Years	-		🗸 OR			•	
Overhaul Every :		-		▼ OR			<u> </u>	·
Retirement/HardTime :		-		■ OR				· · ·
Test/Maint Every:		_		▼ OR			<u>-</u>	· ·
Retirement/HardTime Or	n Condition : 🔽							
Veight & Balance								
/eight : 0 🛨	Arm :	0 🛨 Mome	nt :	0글 ₩/0 Di	sposition :			

- i. **Calibrate Every** interval enter the number associated with the interval on which the tool is required to be calibrated.
- ii. **Calibrate Every** interval unit of measure left-click the drop down arrow in the field to the right of the number field and select the unit of measure associated with the interval on which the tool is required to be calibrated.

NOTE: Only the units of measure "Days", "Weeks", "Months", and "Years" should be used.

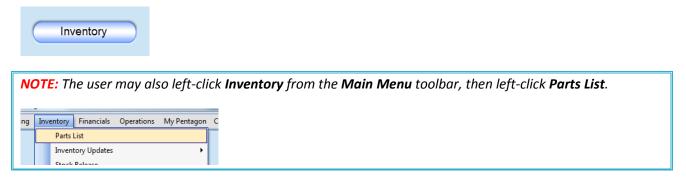
FUTURE CHANGE: The remaining units of measure should be removed.



2. Equipment/Machine Requiring Inspection Setup (in Parts Master File)

Identify that particular part numbers should be considered a piece of equipment or a machine and requires periodic inspection or testing.

a. From the Main Menu screen, left-click the Inventory button.



b. The Partnumber search window will appear.

Search On : P/N	Loc X-Ref	Ser# BOM Cap Ex	Category P/N Type Eligibility	: All	rch Res	ult Lines : [A	_	
Drag a column header h				1					
Partnumber	Rev	Description	NSN	MIL	MFG		ty in Stock		
#1 KLX-135 GPS/CON		INTERFACED INTO KCS	120/19			Bu	1,142		+
#2 KLX-135 GPS/CON		STAND ALONE, INCLUE				Bu			+
0-132-002700000		TOGGLE	5294-98-098-0980	MS21443	08903	Bų	22,585		+
0-132-002700000		Fastener				Buj			+
0-737×1-01241B8		SEAL			F6137	Bu	1,497		+
00-12695-01		CORE			0040	Bų			
00-12700-01		CORE	8010122-1212	11-22-33	13636	Buj	3	ΕA	
00-200-1462		WASHER			7158	Buj	27,732	ΕA	l
00-200-1462P		WASHER-PLATED				Buj	110	ΕA	
00-200-1472		FILTER			F6137	Buj	1,172	ΕA	ſ
00-200-415		TAPE	8010-21-331-1313	DJ1004	F6137	Buj	136	ΕA	Ī
00-6759		CAPSULE	8080-80-808-0800		F5341	Bų	2,174	ΕA	Ī
		24				Dea		ΠA	ħ

c. Select the appropriate part number (left-click the line within the search window and left-click OK; or double-click the line within the search window).



d. The **Partnumber** window will appear.

Partnumber : [AFJ-4561]				
Add Edit Del Prev	→ III 🛣 🚰 Next <u>H</u> ist XRef W/H	Ordr BOM Opt S	rch <u>C</u> ncl O <u>K</u> C <u>l</u> ose	
P/N : AFJ-4561	Rev :	NSN :		
Desc : AIRCRAFT JACK		MIL :		
Stock General Sell Prices	Costs Exchanges Measures	Extended Info Time Con		
			Stock Levels	
P/N : Not Superseded	*	Hold <mark>Note ♀</mark> Alert Note ♀	Min Qty : 0	
🕒 MFG :	Cert :	Obsolete : Note Q	Max Qty : 0	
Stock UM : EA Conc	I : NE Class :	Warranty: Note o	Opt Qty : 0	
Out Bound Stock	Physical Stock	Qty Available	In Bound Stock	
Open SO/WO	In Stock 4	Stock: 4	Open P.O. 0	
Reserved 0	Internal Use 0	ToSell: 4	Prcss/MFG 0	
Booked 0	Consigned 0	Uncommitted P.O.	OH/Repair 0	
Claims 0	QA/Inspc 0	Consumption Analysis	Open RMA 0	
Cores Due 0	Transport 0	Memo1 ©	Cores Due 0	
	Quarantine 0	Memo 2 💡		

- e. Left-click the Edit button in the Partnumber window toolbar.
- f. Left-click the **General** tab.

🕖 [Editing] Partnumber : [AF.	J-4561] AIRCRAFT JACK	
Add Edit Del Prev	→ II 🛣 🔐 Next Hist XRef W/H	
P/N : AFJ-4561	Rev :	NSN :
Desc : AIRCRAFT JACK		MIL :
Stock General Sell Prices	Costs Exchanges Measure	es Extended Info Time Control Eligibility Image
		P/N Indicators
Category :	•	Electrostatic : 🗌 Expendable : 🗖 <u>Publish : 🔽</u>
		Haz Mat : Rotable (Core) : Time Control : 🔽
P/N Type : STK ···	STOCK ITEMS	Repairable : Stolen : Airworthiness : IIII A Stolen : Airworthiness : IIII A Stolen : Airworthiness : IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
	-)	
Sales Line Type : 01 💌 01 - I	nventory Item	RoHS Compliance :
P.O. Line Type : 01 💌 01 - I	nventory Item	ATA Chapter :
Asset Type	Tracing	Publications
C Stock Item	C Lot Trace	© Applications © Manuals © Drawings
C Tools		ଦ୍ଧ Bulletins 🛛 ବୁ Directives
C TOOIS	C Serialized - Multi	
Equip/Machine	Serialized Unique	Part of a Match Set
		Code : Non
	Serials	Desc : Non

- i. Asset Type group box Ensure the radio button to the left of the "Equip/Machine" label is selected.
- ii. **Tracing** group box Ensure the radio button to the left of the "Serialized Unique" label is selected.
- iii. Time Control check box Ensure the check box is marked as "checked".



g. Left-click the Time Control tab.

Add Edit Del P	rev <u>N</u> ext <u>H</u>		Ordr BOM	Op <u>t</u> Srch		O <u>K</u> Close		
P/N : AFJ-4561		Rev :	NSN :					
esc : AIRCRAFT JACK			MIL :					
tock General Sell Pric	es Costs Exc	hanges Measures	Extended Info	Time Control	Eligibility	y Image		
Time Control Type :	•		Factor	rs/Formulas				
Shelf Life :			💡 Star	ndard Scopes				
Sales Warranty :		-		OR		•]	
OH/Repair Warranty :		-	Tolerance	e OR		-		Tolerance
Inspection Every :	6 Mor	ths 🗾		🚽 OR		-		·
Overhaul Every :		•		▼ OR		•		
Retirement/HardTime :		_		▼ OR		v		<u> </u>
Test/Maint Every:		-		▼ OR		-		<u> </u>
Retirement/HardTime On	Condition : 🔽							
Veight & Balance								
veight : 0⊋	••• Arm :	0 🜩 Mor	nent:	😌 w/o Di	enceitice	n : •••		
		III0			sposidul			

- i. **Inspection Every** interval enter the number associated with the interval on which the piece of equipment or machine is required to be inspected or tested.
- ii. **Inspection Every** interval unit of measure left-click the drop down arrow rin the field to the right of the number field and select the unit of measure associated with the interval on which the piece of equipment or machine is required to be inspected or tested.

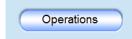
NOTE: Only the units of measure "Days", "Weeks", "Months", and "Years" should be used.

FUTURE CHANGE: The remaining units of measure should be removed.



3. Tool Information Window

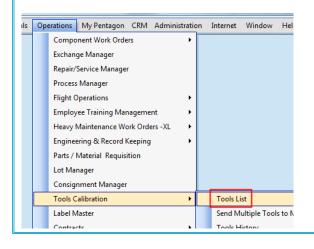
- a. Open the **Tool Information Window** for a particular tool.
 - i. From the Main Menu screen, left-click the Operations button.



ii. The **Operations** window will appear; left-click the **Tooling** button.



NOTE: The user may also left-click **Operations** from the **Main Menu** toolbar, go to **Tools Calibration**, then left-click **Tools List**.





iii. The **Tooling** search window will appear.

Search On : Tools in Sto Start With :	ck Tools out in Calib	ration/Test			м	lax Search Result Lines :	50
Drag a column header here to							
Tool ID	WH Code		Serial No.	Description	MFG	Calibration Every	Next
49704-87	0001	B-65-98	FG-86753	TORQUE WRENCH		1 Years	
49704-87	0001	B-65-98	FG-86349	TORQUE WRENCH		1 Years	
AFJ-4561	0001	B-65-98	Q15451	AIRCRAFT JACK		6 Months	
AFJ-4561	0001	B-65-98	Q15452	AIRCRAFT JACK		6 Months	
AFJ-4561	0001	B-65-98	Q15453	AIRCRAFT JACK		6 Months	
AFJ-4561	0001	B-65-98	Q15454	AIRCRAFT JACK		6 Months	
AT75642	002		890	PULLER		6 Months	Jul-0
HPP-7800	01	A	685	HYDRAULIC PRESURE F		3 Years(EOM)	Feb-
HPP-7800	01	A	1000	HYDRAULIC PRESURE F		3 Years(EOM)	Feb-
HPP-7800	01	A	1001	HYDRAULIC PRESURE F		3 Years(EOM)	
HPP-7800	01	A	1002	HYDRAULIC PRESURE F		3 Years(EOM)	
T-100	TT01	B-65-98	1092929	12" VERNIER CALIPER	AJWS	10 Months	Nov
T-1000	TT01	T-01	566787888	STARRET MICROMETER	1880	5 Months	Oct-I
T-1000	01	TL-100	T55454555	STARRET MICROMETER		5 Months	Oct-
۱.	-						

- iv. Select the appropriate tool (left-click the line within the search window and left-click OK; or double-click the line within the search window).
- v. The **Tool Information** window will appear in "Edit" mode.

	2
i <u>⊗.</u> X √ n <u>S</u> earch <u>C</u> ancel O <u>K</u> (Close /
	Serial No. : Q15451
twood Technology Group	Location : B-65-98 Last Test Status
	Closed
•	🕒 W/H Allocation
rements Test History Tool Histo	ry Trace
	n Search Cancel OK / (< twood Technology Group

vi. Left-click the **OK** button on the **Tool** information window.



b. Toolbar



- i. Edit button Left-click to place the Tool Information window in "Edit" mode.
- ii. **Tests** button Left-click to view a list of the calibration and inspection tests that have been performed on the selected tool, piece of equipment or machine.

Tooling Test	For : TW-1	·		1000		×
🍰 🔌 Add Edit	Close					
	/ the second	ter en en fille a fan en de servere en	and an a fill of the	a at see you a se affe	A chieve sections	anto of the state of the second
Opened On	Tested By	Approved On	Approved By	Closed On	Last Test	Last Test Status
7/10/2012 16:49	001	7/10/2012 00:00	005	7/10/2012 00:0	7/10/2012	Close
/10/2012 16:49	001	7/10/2012 00:00	005	7/10/2012 00:0	(7/10/2012	Cla

iii. **Images** button – Left-click to add, edit, view, or delete images associated with the tool, piece of equipment or machine.

NOTE: Images associated with particular tests may be linked to each of the test records.

iv. **Optn** (Option) button – Left-click to see the list of available options.



- 1. **Send to Material Requisition** left-click to send the selected tool, piece of equipment or machine to a parts/material requisition for calibration.
- v. Cancel button Left-click to cancel all changed made since the record last entered "Edit" mode.

NOTE: The **Cancel** button will appear inactive except while in "Edit" mode.

vi. **OK** button - Left-click to save all changed made since the record last entered "Edit" mode.

NOTE: The **OK** button will appear inactive except while in "Edit" mode.

vii. Close button – Left-click to close the Tool Information window.



c. Header

Tool Information Tool Information Edit Iests Images Optn Search Cancel OK	Close
Tool ID : T-100	Serial No. : 1092929
Warehouse : TT01 Tools Warehouse-Miami Calibration Every : 10 Months	Location : B-65-98 Last Test Status
Last Test: 1/1/2010 Next Test: 11/1/2010	Closed
Owner : 003 Michael Canale	
Calibration Instruction Test Requirements Test History Tool Hist	orul Trace

- i. **Tool ID** field Displays the part number of the selected tool, piece of equipment or machine.
- ii. Serial No. field Displays the serial number of the selected tool, piece of equipment or machine.
- iii. **Warehouse** field Displays the warehouse to which the selected tool, piece of equipment or machine is assigned.
- iv. **Location** field Displays the location to which the selected tool, piece of equipment or machine is assigned.
- v. **Calibration Every** field Displays the interval identified for calibration or inspection in the part master record for the part number of the selected tool, piece of equipment or machine.
- vi. Last Test field Displays the date that the selected tool, piece of equipment or machine was last calibrated or inspected.
- vii. Last Test Status group box Displays the status of the last calibration or inspection test for the selected tool, piece of equipment or machine.
- viii. **Next Test** field Identifies the next date that the selected tool, piece of equipment or machine must be calibrated or inspected in order to be considered serviceable.
- ix. **W/H Allocation** button Left-click to view the selected tool, piece of equipment or machine in the warehouse.
- x. **Owner** field (optional) Identifies the owner of the selected tool, piece of equipment or machine.



d. **Calibration Instruction** tab (optional) – Enter instructions for calibration or inspection of the selected tool, piece of equipment or machine.

Calibration Instruction	Test Requirements Test History Tool History Trace	
Calibrate IAW OEM Mar	anual 43-512	

e. **Test Requirements** tab – Enables the identification of specific testing requirements that must be met in order to pass the calibration or inspection.

Calibration Instru	ction Test Re	quirements Test History T	ool History Trace		
Add	Edit	Delete			
Test Code	Description	Expecte	ed Result	UM	Tolerance (+) 1
•		<no data="" disp<="" td="" to=""><td>ay></td><td></td><td>T F</td></no>	ay>		T F

NOTE: Buttons will only appear on the **Test Requirements** tab while in "Edit" mode.

- i. Add button Left-click to add a test requirement.
- ii. Edit button Left-click to edit an existing test requirement.
- iii. **Delete** button Left-click to delete an existing test requirement.

CONTINUE TO NEXT PAGE



f. **Test History** tab – Enables the recording of the calibration or inspection of the selected tool, piece of equipment or machine.

Calibration Instru	ction Test Requ	iirements Test His	tory Tool History	Trace	
Add	Edit	Refresh			
Opened On	Tested By	Approved On	Approved By	Closed On	Last Test
1/1/2010 3:53:5	006	1/13/2010	005	1/1/2010	1/2/2010
•					Þ

NOTE: Buttons will only appear on the **Test History** tab while in "Edit" mode.

- i. Add button Left-click to add a calibration or inspection.
- ii. Edit button Left-click to edit an existing calibration or inspection.
- iii. **Refresh** button Left-click to refresh the list of existing calibrations or inspections.
- g. **Tool History** tab Displays the list of component and maintenance work orders to which the selected tool was issued.

Calibration Instruction	est Requirements Te	est History Tool History	Trace		
Open Document					
Document Type	Doc No	Opr/Card No	Qty	UM	Estimated Usage
	4>	lo data to display>			
•					Þ

i. **Open Document** button – Opens the selected operation or card to which the selected tool was issued.

CONTINUE TO NEXT PAGE



h. **Trace** tab – Displays the purchase shippers, purchase orders, and purchase receivers associate with the calibration or inspection of the selected tool, piece of equipment or machine.

Shipper P.0 Receiver Drag a column header here to group by that column Purchase Shipper Number Purchase Order Number Purchase Shipper Number Purchase Order Number Purchase Receiver Number	Calibration Instruction	n Test Require	ments Test History Too	ol History Trace	
Purchase Shipper Number Purchase Order Number Purchase Receiver Number	Shipper	P.0	Receiver		
	Drag a column heac	ler here to group	by that column		
<no data="" display="" to=""></no>	Purchase Shipper Nu	mber	Purchase Order Number	Purchase Receiver Numb	er
			<no data="" displa<="" td="" to=""><td>ψ></td><td></td></no>	ψ>	

- i. **Shipper** button Opens the selected purchase shipper.
- ii. **P.O.** button Opens the selected purchase order.
- iii. **Receiver** button Opens the selected purchase receiver.



- 4. Identify Test Requirements
 - a. Left-click the **Edit** button on the **Tool Information** window.
 - b. Left-click the Test Requirements tab.
 - c. Left-click the **Add** button.
 - d. The Test Requirement window will appear.

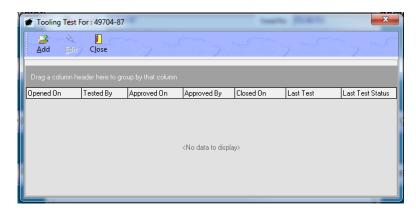
1	🗲 [Add] Test Requirement	3
	Edit Delete Cancel OK Close	2
	Test Code :	-
	Description :	
	Expected Result : 0 🛨 UM :	•
1	Tolerance (+) : 0 🗘	
	Tolerance (-) : 0 🔶	
	Image: Provide the second se	

- i. Test Code field Identify the category of the test requirement.
- ii. Description field Enter the description of the test requirement.
- iii. **Expected Result** field Enter the number associated with the expected measurable result of the test requirement.
- iv. **UM** field Enter the unit of measure associated with the expected measurable result of the test requirement.
- v. **Tolerance (+)** field Enter the acceptable positive variance allowed for the result of the test requirement.
- vi. **Tolerance (-)** field Enter the acceptable negative variance allowed for the result of the test requirement.
- vii. **Test Requirements Tolerance (+)** field Enter the acceptable positive variance allowed for the result of the test requirement
- viii. Test Requirements button Enter any instructions or comments related to the test requirement.



5. Record Test Results

- a. Left-click the **Tests** button on the **Tool Information** window.
- b. The **Tooling Test** window will appear.



- c. Left-click the Add button in the **Tooling Test** window toolbar.
- d. The **Test/Calibrate** window will appear and will be in "Edit" mode.

🖉 Test/Calibrate # 31 For Part : 49704-87 S/N : FG-86753
Edit Delete Oppn Settings Cancel OK Close
Opened On : 2/22/2013 5:07:49 PM Closed On : -
Tested On : Approved On :
Tested By : Approved By : .
Temp: 0+ Fahrenheit
Humidity : 0 🔔 %
Vendor:
Contact :
Test Description Detailed Findings Service Performed Test Results

- e. Toolbar
 - i. Edit button Left-click to place the Test/Calibrate window in "Edit" mode.
 - ii. **Delete** button Left-click to delete the test/calibration record.



- iii. **Optn** (Option) button Left-click to see the list of available options.
 - 1. Images Left-click to add images related to the specific test/calibration record.
 - 2. **Print Certificate** Left-click to print a calibration certificate identifying the results of the specific test/calibration record.
- iv. Settings button Left-click to save or clear the window size and position.
- v. Cancel button Left-click to cancel all changed made since the record last entered "Edit" mode.

NOTE: The Cancel button will appear inactive except while in "Edit" mode.

vi. **OK** button - Left-click to save all changed made since the record last entered "Edit" mode.

NOTE: The OK button will appear inactive except while in "Edit" mode.

- vii. **Close** button Left-click to close the **Test/Calibrate** window.
- f. Header
 - i. **Opened On** field identify when the test/calibration record was opened. This field will automatically be populated with the date and time that the test/calibration record was added.
 - ii. **Tested On** field Identify when the test/calibration was actually performed.
 - iii. **Tested By** field If the test/calibration was performed in house, identify the individual who performed the test/calibration.
 - iv. **Temp** field Identify the temperature at the time of test/calibration (if applicable).
 - v. **Humidity** field Identify the humidity at the time of test/calibration (if applicable).
 - vi. **Vendor** field If the test/calibration was performed by a vendor, identify the vendor who performed the test/calibration.
 - vii. **Contact** field If the test/calibration was performed by a vendor, identify the point of contact for the vendor who performed the test/calibration.
 - viii. **Approved By** field If the test/calibration requires verification or approval, identify the individual who approved the test/calibration.
 - ix. **Approved On** field If the test/calibration requires verification or approval, identify the date on which the test/calibration was approved.
 - x. **Closed On** field Identify the date that the test/calibration was closed.



- g. Tabs
 - i. Test Description tab Enter any notes related to the specific test/calibration that was performed.
 - ii. **Detailed Findings** tab Enter any notes related to the results of the specific test/calibration that was performed.
 - iii. **Service Performed** tab Enter any notes related to associated servicing during the specific test/calibration.
 - iv. **Test Results** tab the test requirements created on the **Test Requirements** tab of the **Tool Information** window will be listed.

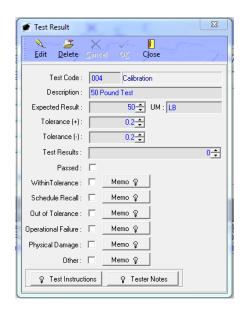
Test Descrip	tion Detailed Find	dings Service P	erformed Test Results			
Add	Edit	Delete				
Drag a colu			umn			
Test Code	Description		Expected Result	UM	Tolerance (+)	Tolerance (-)
004	50 Pound Test		50	LB	0.2	0.2
004	250 Pound Test		250	LB	0.2	0.2
1						Þ

1. Double-click one of the test requirements to enter the test results.

CONTINUE TO NEXT PAGE



2. The Test Result window will appear.



- 3. The details of the test requirements will be automatically populated in the upper portion of the **Test Result** window.
- 4. Left-click the Edit button from the Test Result toolbar.
 - a. **Test Results** field Identify the number associated with the test/calibration results in terms of the unit of measure identified in the test requirements.
 - b. **Passed** check box Mark the check box as "checked" if the tool, piece of equipment, or machine passed this test/calibration.
 - c. **Within Tolerance** check box Mark the check box as "checked" if the tool, piece of equipment, or machine was found to be within tolerance.
 - d. **Schedule Recall** check box Mark the check box as "checked" if an evaluation of all work performed by the tool, piece of equipment, or machine should be scheduled.
 - e. **Out of Tolerance** check box Mark the check box as "checked" if the tool, piece of equipment, or machine was found to be out of tolerance.
 - f. **Operational Failure** check box Mark the check box as "checked" if the test could not be performed because the tool, piece of equipment, or machine failed to function properly.
 - g. **Physical Damage** check box Mark the check box as "checked" if the test could not be performed because the tool, piece of equipment, or machine is physically damaged.



- h. **Other** check box Mark the check box as "checked" for whatever your organization chooses to use the check box to indicate.
- i. Memo buttons Enter any information related to each of the check boxes (if applicable).
- j. **Test Instruction** button Enter any instructions related to the specific test result.
- k. Tester Notes button Enter any notes that the tester provided about the specific test result.
- 5. Left-click the **OK** button in the **Test Result** window toolbar to save the record.
- 6. Left-click the **Close** button in the **Test Result** window toolbar to close the record.



- 6. Send Tool Out for Calibration
 - a. Left-click the **Optn** button from the **Tool Information** window toolbar, then left-click **Send to Material Requisition**.

Tool Information Tool Information Edit Tests Images Optim Source	rial Requisition
Tool ID : 49704-87	Serial No. :

b. The Stock W/H to Requisition window will appear.

Cancel OK	
Qty : 1	Company : 1 Division : Department :
Note :	

- i. **Qty** field Identify the quantity being sent out for calibration. This number should always be "1".
- ii. **Cond** field Displays the condition of the item in the warehouse.
- iii. **Priority** field Identify the priority of this calibration.
- iv. Note field Enter any short note related to the calibration.
- v. **Company**, **Division**, and **Department** fields identifies the company, division, and department with which the PMR will be associated.
- c. Left-click the OK button on the Stock W/H to Requisition window toolbar.

CONTINUE TO NEXT PAGE



d. The **Parts/Material Requisition** window will appear. The line will be identified as "Requested for Calibration".

🍠 Parts / I	Material Requi	isition										
		oid <u>R</u> pt <u>F</u>	list Aprv		Conv <u>F</u> ilter	優 Re <u>s</u> p.	X √ <u>C</u> ncl O <u>K</u>	Close	Setting Top:	100 🔹	77	
Drag a coli												
Reg No.	Part Number			Rev	Account	Cond	Q. Req	UM	Q. Aprv.	Status	Req On	Aprv. On
001148	49704-87	TORQU	JE WRENCH			NE		1 EA		0 Open	02/23/201	3 06:42:16
												4
Requeste	d For Calibrati	ion										
Requested	By Approved	By Converte	ed To Custor	mer Contrac	ət							
Reg. By	y : 005		Cosmo Kram	ner			Converted		97	Header Stat	us	
Ship or	n:		🎲 Due	on:			Dip No		01	Line Status		
Note	e :			,				Stock		Status		
Priority	y :											
S/N	N : FG-86753		,									
Discrepancy	y :						Stock F	ielease :]			
Accl				🕒 Ca	pability 🕒 Tra	ansfer	ଦ୍ମ Mess	age	ଦ୍ଧ Memo			
RFQ Only	y : 🗖											



- 7. Issue Tools to Operations/Cards
 - a. Normal Issue
 - i. From the Main Menu toolbar, left-click the Inventory menu item, then left-click Issue Tools to W/O and Maintenance XL.
 - ii. The Issue Tools to W/O and Maintenance XL window will appear.

Add Edit	/ Signatures		earch Se <u>t</u> tings		rint Close Top: 50	1	, ~S	7/	, ~~~
Drag a column he W.O/MNT No.	eader here to group	p by that column Opr / Card	Part Number	SubP	Description		Serial No	Іим	Qty Issu
000042	Maintenance XI	<u> </u>	49704-87	1	TORQUE WRENCH	56363	FG-86753	EA	1.0000 005
001110	Manufacturing	10.000000000	T-300	1	DIGITAL MICROMETER 0-1"	38918	567567567	EA	1.0000 001
000283	Maintenance XL	002	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
001091	Overhaul	10.00000000	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000679	Manufacturing		T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000268	Maintenance XI	002	T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000250	Maintenance XL	016	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000247	Maintenance XI	003	T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000239	Maintenance XI	001	T-400	1	HOLE DIAL INDICATOR	940	99978797879	EA	1.0000 001
000201	Maintenance XI	002	T-900	1	ETCHING MACHINE	1450	75676	EA	1.0000 001
000566	Overhaul		T-C400	1	Caliper	45413	T1000	EA	1.0000 001
000539	Overhaul		T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000525	Repair/Service		T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000527	Overhaul	80.00000000	T-C400	1	Caliper	45411	T1003	EA	1.0000 001
000529	Repair/Service	40.000000000	T-C400	1	Caliper	45412	T1006	EA	1.0000 001
	Repair/Service		T-C400	-	Caliper	45410	T1000	FA	1.0000 001

iii. Toolbar

- 1. Add button Left-click to create a new tool assignment record.
- 2. Edit button Left-click to edit an existing tool assignment record.
- 3. **Signatures** button for future functionality, may be ignored in Build 8.5.54.107 and earlier.
- 4. **Open Doc** button Left-click to open the component or maintenance work order to which an existing tool assignment record is associated.
- 5. Search button Left-click to search existing tool assignment records.
- 6. **Settings** button Left-click to save or clear the window size and position.
- 7. Filter button Left-click to set filters in the Issue Tools to W/O and Maintenance XL window grid.
- 8. Print button left-click to print the tool issue for an existing tool assignment record.
- 9. Close button left-click to close the Issue Tools to W/O and Maintenance XL window.
- iv. Left-click the Add button on the Issue Tools to W/O and Maintenance XL window toolbar.



v. The Tool Assignment (Issue/Return) window will appear.

Issue Return Options	Cancel				
Tool Information Card/Opr ID# :	··· Opr No. :		W/H Info	UM :	
MNT/WO:			W/H Code :	SSN :	
UID :			Ref. 1 :		
Part Number :	Estimate Usage :	-	Ref. 2 :		
			Ref. 3 :		
Description :			Ref. 4 :		
Serial No:			Ref. 5 :		
Note :		•	Ref. 6 :		
Issue To			Ref. 7 :		
Issued By :	Date :		Ref. 8 :		
Issued To :	Date :		Ref. 9 :		
			Ref. 10 :		
			Ref. 11 :		
			Ref. 12 :		
			Ref. 13 :		
Returned By	Data		Ref. 14 :		
Returned By : Returned To :	Date:		Ref. 15 :		

1. **Card/Opr ID#** field - Identify the maintenance work order card or component work order operation to which the tool will be issued, then press the 'Tab' key.

BARCODING: If you have a printed copy of the maintenance work order card or component work order operation, scan the card or operation number.

The **MNT/WO**, **Issued By** and **Date** fields will be populated automatically.

2. **UID** field – Identify the UID of the tool that is being issued.

BARCODING: If you have tools labeled with UID barcodes, scan the UID barcode.

The **Part Number**, **Description**, **Serial Number** fields, as well as the field within the **W/H Info** group box will be populated automatically.

- 3. Estimate Usage field Identify the length of time to tool is expected to be checked out before it is returned (if desired).
- 4. Note field Enter a short note related to the issue of this tool (if applicable)
- 5. Issued to field Identify the individual to whom the tool will be issued.

BARCODING: If the user has a barcoded employee badge, scan the user barcode.

The **Issued to Date** fields will be populated automatically.



- 6. Left-click the Issue button on the Tool Assignment (Issue/Return) window toolbar.
- b. Quick Issue This option is particularly useful when using barcodes. A tool can be issued in three barcode scans.
 - i. From the Main Menu toolbar, left-click the Inventory menu item, then left-click Quick Tool Issue.
 - ii. The Tool Assignment (Issue/Return) will appear.

💣 Tool Assignment (Issue/ Return)	X
Issue Return Options Cancel	50.50
Tool Information	
Card/Opr ID# :	••• Opr No. :
MNT/W0 :	
UID :	
Part Number :	Estimate Usage :
Description :	
Serial No :	
Note :	•
Issue To	
Issued By :	Date :
Issued To :	Date :
Returned By	
Returned By :	Date :
Returned To:	Date :

1. **Card/Opr ID#** field - Identify the maintenance work order card or component work order operation to which the tool will be issued, then press the 'Tab' key.

BARCODING: If you have a printed copy of the maintenance work order card or component work order operation, scan the card or operation number.

The **MNT/WO**, **Issued By** and **Date** fields will be populated automatically.

2. **UID** field – Identify the UID of the tool that is being issued.

BARCODING: If you have tools labeled with UID barcodes, scan the UID barcode.

The Part Number, Description, Serial Number fields will be populated automatically.

- 3. Estimate Usage field Identify the length of time to tool is expected to be checked out before it is returned (if desired).
- 4. Note field Enter a short note related to the issue of this tool (if applicable)



5. **Issued to** field – Identify the individual to whom the tool will be issued.

BARCODING: If the user has a barcoded employee badge, scan the user barcode.

The **Issued to Date** fields will be populated automatically.

6. Left-click the Issue button on the Tool Assignment (Issue/Return) window toolbar.



- 8. Return Tools from Operations/Cards
 - a. Normal Return
 - i. From the Main Menu toolbar, left-click the Inventory menu item, then left-click Issue Tools to W/O and Maintenance XL.
 - ii. The Issue Tools to W/O and Maintenance XL window will appear.

Add Edit	Signatures	Open <u>D</u> oc <u>S</u> e	earch Se <u>t</u> tings		Top: 50	1			
W.O/MNT No.	Type	Opr / Card	Part Number	SubP	Description		Serial No	ИМ	Qty Issu
000042	Maintenance XI	001-1	49704-87	1	TORQUE WRENCH	56363	FG-86753	EA	1.0000 005
001110	Manufacturing	10.000000000	T-300	1	DIGITAL MICROMETER 0-1"	38918	567567567	EA	1.0000 001
000283	Maintenance XL	002	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
001091	Overhaul	10.000000000	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000679	Manufacturing		T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000268	Maintenance XI	002	T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000250	Maintenance XL	016	T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000247	Maintenance XI	003	T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000239	Maintenance XI	001	T-400	1	HOLE DIAL INDICATOR	940	99978797879	EA	1.0000 001
000201	Maintenance XL	002	T-900	1	ETCHING MACHINE	1450	75676	EA	1.0000 001
000566	Overhaul		T-C400	1	Caliper	45413	T1000	EA	1.0000 001
000539	Overhaul		T-1000	1	STARRET MICROMETER	931	566787888	EA	1.0000 001
000525	Repair/Service		T-1000	1	STARRET MICROMETER	1040	T55454555	EA	1.0000 001
000527	Overhaul	80.000000000	T-C400	1	Caliper	45411	T1003	EA	1.0000 001
000529	Repair/Service	40.000000000	T-C400	1	Caliper	45412	T1006	EA	1.0000 001
000323			T-C400		Caliper		T1000	FA	1.0000 001

- iii. Left-click the line that identifies the tool that is to be returned.
- iv. The Tool Assignment (Issue/Return) window will appear.

🍯 Tool Assignment (Issue/ Return)				X
Issue Return Options Canc	el many many	,	7.05	1 11
Tool Information		W/H Inf	io	
Card/Opr ID# :	474 Opr No. : 1.0000	Location	n : T-01	UM : EA
MNT/WO : 000033		W/H Code	e: TT01	SSN: 0
UID :	931	Trace/DC	: 10/2010	
Part Number : T-1000	Estimate Usage : 1 Days 💌	Tag Date	a : 10/2010	
		Tag Info	AVIALL	
Description : STARRET MICROMET	ER	Mfg Lot#	t : 66223344	
Serial No : 566787888		Heat No	99-5477-22	
Note :	*	Test Y/N	l: <mark>Y</mark>	
Issue To		COC Y/N	l: Y	
Issued By : 005 Cosmo Krar	ner Date : 2/23/2013 7:17:34	8130 Y/N	l: <mark>Y</mark>	
Issued To : 002 Jean-Pierre	Guyeu Date : 2/23/2013 7:26:46	TA106 Y/N	l: <mark>Y</mark>	
A. W		EASA Y/N	l: <mark>Y</mark>	
Authorized Signatures		Marking	; Commercial	
1. 2 3		Lube Life		
		Next Lube	e:	
Returned By		Insp Due		
Returned By : 002 Jean-Pierre	-	Next Coun	t:	
Returned To:	Date :			



- v. **Returned By** field Displays the individual to whom the tool was issued previously. This field may be modified if returned by a different user.
- vi. Returned To field Identify the individual receiving the returned tool.

BARCODING: If the user has a barcoded employee badge, scan the user barcode.

The **Returned To Date** will be populated automatically.

- vii. Left-click the Return button from the Tool Assignment (Issue/Return) window toolbar.
- b. Quick Return This option is particularly useful when using barcodes. A tool can be returned in two barcode scans.
 - i. From the Main Menu toolbar, left-click the Inventory menu item, then left-click Quick Tool Return.
 - ii. The Tool Assignment (Issue/Return) window will appear.

💣 Tool Assignment (Issue/ Return)	X	J
Issue Return Options Cancel		
Tool Information		٦
Card/Opr ID# :	Opr No. :	
MNT/W0 :		
UID :	_	
Part Number :	Estimate Usage :	
,	-, ,	
Description :		
Serial No :		
Note :		
Issued By:	Date :	
Issued To :	Date :	
L		
Returned By	Data	
Returned By :	Date :	
Returned To:	Date :	

1. **UID** field – Identify the UID of the tool that is being issued.

BARCODING: If you have tools labeled with UID barcodes, scan the UID barcode.

The window will be populated automatically with the information identified during the issue of the tool.

2. **Returned By** field – Displays the individual to whom the tool was issued previously. This field may be modified if returned by a different user.



3. **Returned To** field – Identify the individual receiving the returned tool.

BARCODING: If the user has a barcoded employee badge, scan the user barcode.

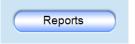
The **Returned To Date** will be populated automatically.

4. Left-click the Return button from the Tool Assignment (Issue/Return) window toolbar.

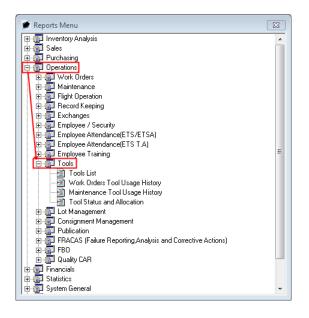


9. Reports

a. From the **Main Menu** screen, left-click the **Reports** button.



b. The Reports Menu window will appear.



- c. Left-click on the \boxdot to the left of **Operations** to expand the menu.
- d. Left-click on the \boxdot to the left of **Tools** to expand the menu.
 - i. Tools List report This report is a simple list of tools displaying part and calibration information..
 - ii. Work Orders Tool Usage History report This report displays the component work orders and the associated operations to which a tool (or list of tools) was issued.
 - iii. **Maintenance Tool Usage History** report This report displays the maintenance work orders and the associated cards to which a tool (or list of tools) was issued.
 - iv. Tool Status and Allocation report This report displays the status of all (or selected) parts.