



CALIBRATION APPLICATION MANUAL

MMS-WQM-207

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Mireaux Management Solutions

ISO/API Consulting ■ Auditing ■ Training ■ Web QMS



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1.0 PURPOSE AND SCOPE

The Calibration Application is a powerful, user-friendly system designed to keep track of the calibration, verification, and validation of all your inspection, measuring, and test equipment. The application is designed to handle pertinent information regarding the equipment, such as calibration records and certificates. The purpose of this manual is to guide users through the necessary steps to add, edit, delete, and view Calibration Information.

NOTE 1: In order to perform the processes below you need to be assigned the Calibration Technician role.

NOTE 2: In order to perform the processes in section **4.4 Calibration Administration**, you need to be assigned the Maintenance Admin role.

NOTE 3: Depending on the customization of your Web QMS, the figures shown in this manual may not coincide perfectly with your Web QMS.

2.0 TERMS AND DEFINITIONS

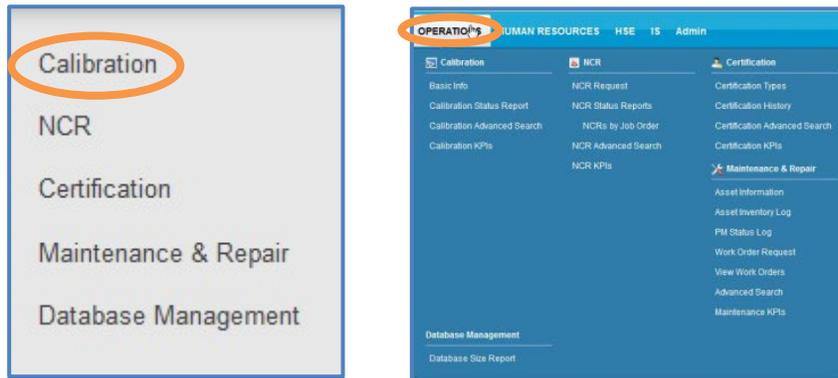
KPI Key Performance Indicators

3.0 SECURITY ROLES

Administrator	Full Web QMS Enterprise Administrator. This user can edit, create, or delete pages, as well as add, edit, or delete modules. Administrators can also authorize users, add roles, view File Manager, clear Logs, and view/clear Recycle Bin.
Calibration Technician	This user can add and edit equipment and Calibration Information for equipment located in the sites to which they were assigned. The Calibration Technician receives email notifications only for the location to which they were assigned.
Global Calibration Administrator	This user can add, edit, and delete equipment and Calibration Information for the equipment in the Calibration Application. Global Calibration Administrators receive email notifications about equipment in all locations that is nearly due, or past due, for calibration.

4.0 INSTRUCTIONS

The **Calibration** Application is located under the **Operations Tab** of the Top Menu and the Left Menu of the **Operations** page.



Once you **SELECT Calibration Tab** in the Left Menu of the **Operations** page or the Top Menu of the Operations Tab, you will be directed to the **Calibration Application** page, which should look similar to this:



4.1 CALIBRATION APPLICATION PROCESS

There are two basic processes that need to be completed in order to see Calibration Information:

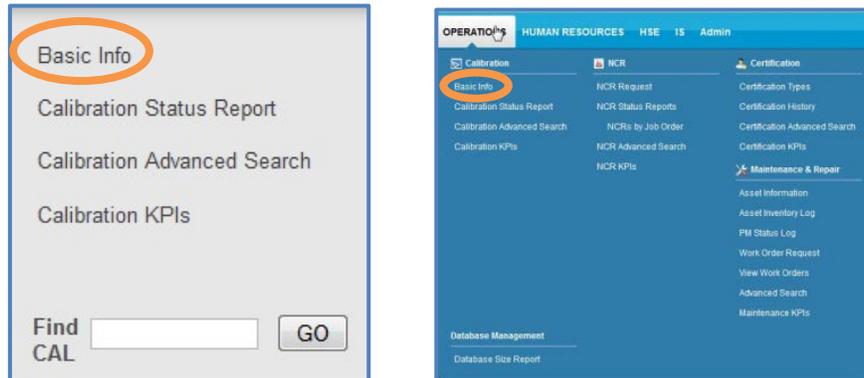
- Enter basic information to register a piece of equipment.
- Add Calibration Information to the registered piece of equipment.

Once a piece of equipment is entered, there is no need to re-enter its basic information whenever additional Calibration Information is available.

4.2 ADDING/EDITING/DELETING EQUIPMENT

4.2.1 Adding Equipment

The **Basic Info** page is used to register equipment. To access the **Basic Info** page, CLICK **Basic Info** in the Left Menu or in the Top Menu of the Operations Tab.



The screen that opens will display a form with various fields which are used to define and describe the equipment before adding it to the system. The fields are as follows:

You are here: OPERATIONS > Calibration > Basic Info

ADD EQUIPMENT BASIC INFORMATION

<input checked="" type="checkbox"/> Equipment ID*:	<input type="text" value="CAL_D4DFAB5"/>
<input checked="" type="checkbox"/> Location*:	-- Please select location --
<input checked="" type="checkbox"/> Department or Area*:	-- Please choose --
<input checked="" type="checkbox"/> Equipment Type:	<input type="text"/>
<input checked="" type="checkbox"/> Manufacture / Brand:	-- Please Choose --
<input checked="" type="checkbox"/> Second Manufacturer / Brand:	-- Please Choose --
<input checked="" type="checkbox"/> Model Number:	<input type="text"/>
<input checked="" type="checkbox"/> Serial Number:	<input type="text"/>
<input checked="" type="checkbox"/> Range:	<input type="text"/>
<input checked="" type="checkbox"/> Accuracy:	<input type="text"/>
<input checked="" type="checkbox"/> Short Description:	<input type="text"/>
<input checked="" type="checkbox"/> Used as Calibration Standard*:	<input type="radio"/> True <input checked="" type="radio"/> False
<input checked="" type="checkbox"/> Owned By*:	<input checked="" type="radio"/> Company <input type="radio"/> Employee <input type="radio"/> Customer
<input checked="" type="checkbox"/> Check Type*:	<input type="radio"/> Calibration <input type="radio"/> Verification <input type="radio"/> For Reference <input type="radio"/> Each Use
<input checked="" type="checkbox"/> Calibration Outsourced*:	<input checked="" type="radio"/> True <input type="radio"/> False
<input checked="" type="checkbox"/> Calibration Interval (in months)*:	<input type="text" value="6"/>
<input checked="" type="checkbox"/> Status:	<input type="text" value="In Service"/>
<input checked="" type="checkbox"/> Cost:	<input type="text"/>

[Save](#)

NOTE: Fields marked with a red asterisk are required.

The **Add Equipment Basic Information** page contains the following fields:

- **Equipment ID:** This is a system-generated number. You can override this number and enter a currently used Equipment ID, such as a Serial Number.

- **Location:** SELECT **Where** the equipment is located, used, or stored. Once you SELECT a location, the Department or Area field will populate with choices.
- **Department or Area:** CHOOSE the **Specific Department** or area where the equipment is located. The Department or Area drop down menu choices will vary based on the location you selected in the Location field.
- **Equipment Type:** ENTER the **Type** of equipment (i.e., Micrometer, Scale, etc.)
- **Manufacture/Brand:** SELECT the **Manufacturer** or **Brand** of the equipment from the drop down menu. If they are not listed, contact the Administrator.
- **Second Manufacturer/Brand:** If the equipment is made of components from two different Manufacturers or Brands, you can ENTER the **Second Name** here.
- **Model Number:** ENTER the equipment's **Model Number**, if available.
- **Serial Number:** ENTER the equipment's **Serial Number**, if available. This is important if your Equipment ID is not the serial number.
- **Range:** ENTER the equipment **Measurement Range**, if available (i.e., 100-1000 lbs.)
- **Accuracy:** ENTER the equipment's **Measurement Accuracy**, if available (i.e., +/- 10 lbs.)
- **Short Description:** ENTER any further **Information** needed to identify the equipment, such as company asset number, inventory code, etc.
- **Used as Calibration Standard:** If this equipment is used as a calibration/verification standard, SELECT **True**. If this equipment is not used as such, SELECT **False**.
- **Owned By:** SELECT whether this equipment is owned by the **Company**, an **Employee**, or a **Customer**. If it is owned by an employee, you may be able to SELECT or ENTER their **Name**.



- **Employee:** SELECT the **Employee** who owns this equipment. If the employee is not on the list, contact the Administrator.
- **Check TYPE:** SELECT whether this equipment is calibrated/verified on a **Regular Schedule**, used for **Reference Only**, or calibrated/verified **Before Each Use**.
- **Calibration Outsourced:** If the calibration is done by an external lab, SELECT **True**. If the calibration is done on-site by company personnel, SELECT **False**.
- **Calibration Interval:** ENTER the number of **Months** between calibration cycles. If no value is entered, the system will assign the default value of 6 months.
- **Status:** SELECT the **Status** of the equipment. Web QMS comes with four designated statuses. If equipment is being used, CHOOSE **In Service**. If it is being repaired, CHOOSE **In Repair**. If it is not being used, CHOOSE **Out of Service**. If it has been permanently retired, CHOOSE **Inactive**. (If your company has pre-established statuses for equipment, we recommend using those.)
- **Cost:** ENTER the average **Cost** for calibrating this instrument, if available.

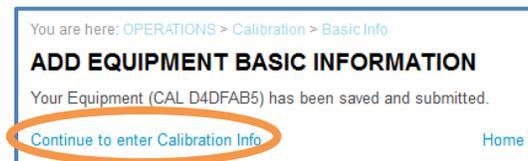
Once you have entered the information, CLICK **Save** in the bottom left corner of the page. The following screen will appear:



You can either **CLICK Home** to return to the main **Calibration** page or **CLICK Continue to Enter Calibration Info** to add Calibration Information to the newly registered piece of equipment.

4.2.2 Adding Calibration for New Equipment

If you wish to add Calibration Information to a piece of equipment immediately after adding it to the Calibration Application, **CLICK Continue to Enter Calibration Info**.



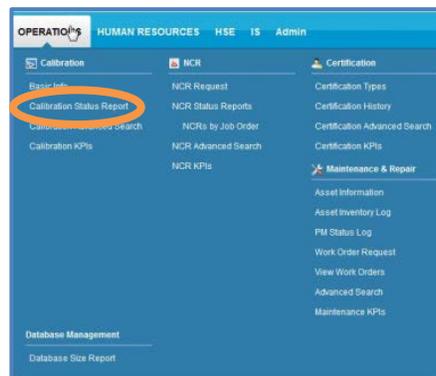
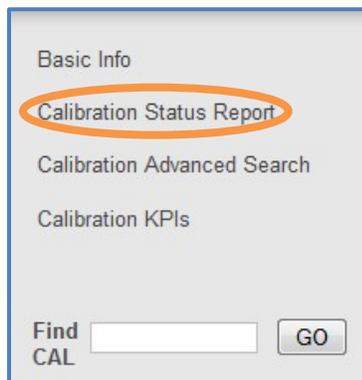
The resulting page will contain the screen to add Calibration Information. See Section 4.2.5 Adding Calibration Information.

4.2.3 Adding Calibration for Existing Equipment

If you wish to enter Calibration Information for a piece of equipment that already exists, first locate the equipment. For more information about finding equipment, refer to section 4.3 **Locating a Piece of Equipment**.

The end result of all available ways to find equipment is a list of equipment similar to the list displayed on the **Calibration Status Report** page.

To access the **Calibration Status Report** page, **CLICK Calibration Status Report** in the Left Menu or in the drop down menu of the Operations Tab.



The **Calibration Status Report** page contains two different ways to add Calibration Information:

	EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
	CAL 04AF49C	Chicago	Quality Lab	Multi-Range Conductivity Meter	Hanna	HI 9033	08152955	3/1/2012	3/1/2013		
	CAL 2861A59	Singapore	Engineering	Dial Indicator/Metric	-	716	NSN	5/26/2009	11/26/2009	View	

- The **Magnifying Glass icon**.
- The **Green Plus Sign icon**.

CLICK the **Magnifying Glass icon** next to a piece of equipment to display all available information about the equipment:

Equipment Information

Location	Chicago	Department or Area	Quality Lab
Equipment Type	Multi-Range Conductivity Meter	Manufacture / Brand	Hanna
Model Number	HI 9033	Serial Number	08152955
Used as Calibration Standard	False	Owned By	Company/
Check Type	Calibration	Calibration Outsourced	False
Calibration Interval (in months)	12	Status	In Service
Short Description	test		

Calibration History

	CAL COMPANY	CAL DATE	QUE DATE	AS RECEIVED CONDITION	CERTIFICATE	CAL TECH	STANDARD USED / DESC	STD DUE DATE	STD TRACEABLE
✖	Standard Instrument Service	9/15/2010	9/15/2011	In Tolerance	View Certificate			1/1/1900	
✖	CNC	3/1/2012	3/1/2013	In Tolerance	View Certificate			1/1/1900	

[Add calibration record](#) [Back](#)

CLICKING the **Add Calibration Record** link at the bottom of the **Equipment Information** page or the **Green Plus Sign icon** at the top of the **Calibration Status Report** page directs you to the same page.

Calibration History

	CAL COMPANY	CAL DATE	QUE DATE	AS RECEIVED CONDITION	CERTIFICATE	CAL TECH	STANDARD USED / DESC	STD DUE DATE	STD TRACEABLE
✖	Standard Instrument Service	9/15/2010	9/15/2011	In Tolerance	View Certificate			1/1/1900	
✖	CNC	3/1/2012	3/1/2013	In Tolerance	View Certificate			1/1/1900	

[Add calibration record](#) [Back](#)

CLICK the **Green Plus Sign icon** in the **Calibration Status Report** page, or the **Add Calibration Record** link on the **Equipment Information** page. The page that appears will display the screen to add Calibration Information. See Section 4.2.5 Adding Calibration Information.

4.2.4 Adding Calibration Information when Calibration is Outsourced

You are here: OPERATIONS > Calibration > Incremental Info

CALIBRATION INFORMATION

Equipment ID:

Calibrating Company:

Calibration Date:

Next Calibration Due Date:

By default, the next Calibration Due Date is determined from the Calibration Date entered above plus the Calibration Interval (in months) as specified during the Equipment Information entry.

As Received Condition:

Certificate:

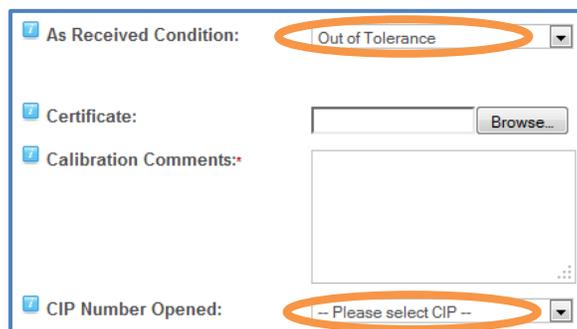
Cost:

[Save](#)

NOTE: Fields marked with a red asterisk are required.

The **Calibration Information** page contains the following fields:

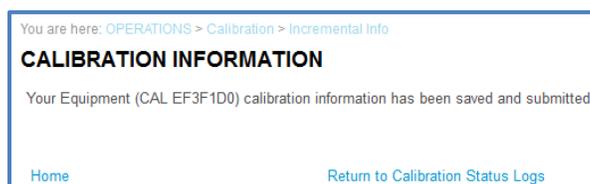
- **Equipment ID:** This field will be pre-populated with the equipment ID selected. You cannot change it.
- **Calibrating Company:** SELECT the **Company** that performs the calibration. If they are not listed, contact the Administrator.
- **Calibration Date:** ENTER the **Date** the calibration took place in MM/DD/YYYY format, or SELECT the date from the calendar. Make sure the date you enter is valid. For example, you should not enter 2/29/2013, because 2013 is not a leap year.
- **Next Calibration Due Date:** CLICK **Calculate Due Date** to determine the due date based on the Calibration Date, or ENTER the due date manually.
- **As Received Condition:** SELECT whether the equipment was **In Tolerance** or **Out of Tolerance** when the first reading for calibration took place. If the calibration was Out of Tolerance, the system will ask for the **CIP Number Opened**, because Out of Tolerance conditions must be investigated and therefore the system will prompt to select a CIP from the drop down list. If you have already entered a CIP for this reason, select it from here, otherwise go to the CIP Application, open a CIP, and come back when you have it. For more information about the CIP Application, refer to the **CIP Application Manual**.



- **Certificate:** ATTACH the relevant **certificate** by CLICKING **Browse**. LOCATE and SELECT the **certificates** from your Documents. When uploading certificates, try to have all the calibration certificates already scanned and saved as PDF files in one place.
- **Cost:** ENTER the **Cost** associated with the calibration of the equipment.

Once you have entered the information, CLICK Save in the bottom left corner of the page.

Remember that items with a red asterisk are required. Once you CLICK **Save**, you will receive this message:

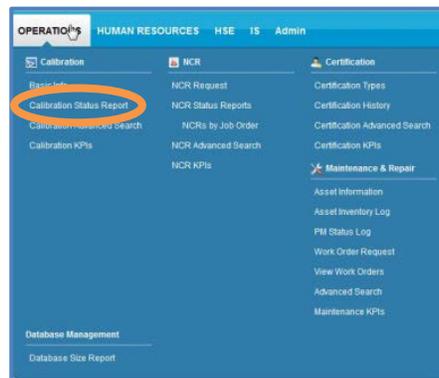
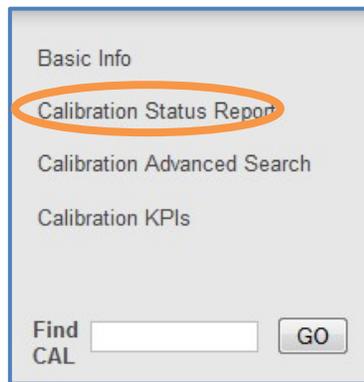


NOTE: If you are entering more than one calibration cycle for a single piece of equipment, make sure to add the Calibration Information and certificates from **oldest to newest**. This means that if you calibrated the product on 1/1/2010, and again on 7/1/2010, you should enter the information for 1/1/2010 first. This will keep the calibration reminder clock set properly.

4.2.5 Editing Equipment Information

The **Calibration Status Report** page allows you to edit the basic information about a piece of equipment.

To access the **Calibration Status Report** page, **CLICK Calibration Status Report** in the Left Menu or in the Top Menu of the Operations Tab.



The following screen will appear:

You are here: OPERATIONS > Calibration > Calibration Status Report

CALIBRATION STATUS REPORTS

Equipment Status:

 Calibration Status:

 Location:

Calibration Status Report Result

	EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
	CAL_AA9C17F	Houston	Administrative	Scale	Taylor	2020W	077784001080	10/8/2013	10/8/2014	View Certificate	
	CAL_D4AD928	Houston	Administrative	Tape Measure	Stanley	30-8	07617430812	11/9/2012	11/9/2013	View Certificate	

CLICK the **Manage Yellow Pencil icon**. The page that appears will contain mostly pre-populated fields, because the equipment is already registered in the system. The fields that show are available to be updated or edited as needed.

You are here: OPERATIONS > Calibration > Basic Info

ADD EQUIPMENT BASIC INFORMATION

Equipment ID:*

Location:*

Department or Area:*

Equipment Type:

Manufacture / Brand:

Second Manufacturer / Brand:

Model Number:

Serial Number:

Range:

Accuracy:

Short Description:

Used as Calibration Standard:* True False

Owned By:* Company Employee Customer

Check Type:* Calibration Verification For Reference Each Use

Calibration Outsourced:* True False

Calibration Interval (in months)*:

Status:

Cost:

[Save](#)

When you are done editing the Basic Information, **CLICK Save**.

You can also edit calibration records from the **Calibration Status Report Results** page. To access the **Calibration Status Report Results** page, first locate the equipment for whose calibration records you wish to modify. For more information about locating equipment, refer to section 4.3 **Locating A Piece Of Equipment**.

Once you have located the equipment, **CLICK the Magnifying Glass icon** next to the equipment to display all available information about that equipment.

Calibration Status Report Result

EquipmentID # CAL 04AF49C 

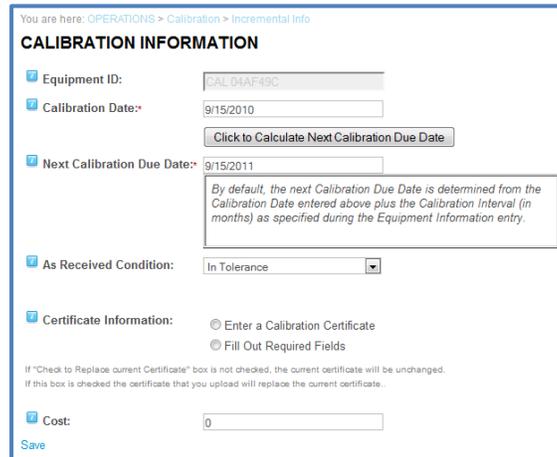
EQUIPMENT INFORMATION			
Location	Chicago	Department or Area	Quality Lab
Equipment Type	Multi-Range Conductivity Meter	Manufacture / Brand	Hanna
Model Number	HI 9033	Serial Number	08152955
Used as Calibration Standard	False	Owned By	Company/
Check Type	Calibration	Calibration Outsourced	False
Calibration Interval (in months)	12	Status	In Service
Short Description	test		

CALIBRATION HISTORY									
	CAL COMPANY	CAL DATE	DUE DATE	AS RECEIVED CONDITION	CERTIFICATE	CAL TECH	STANDARD USED - DESC	STD DUE DATE	STD TRANSFERABLE
	Standard Instrument Service	9/15/2010	9/15/2011	In Tolerance	View Certificate			1/1/1900	
	CNC	3/1/2012	3/1/2013	In Tolerance	View Certificate			1/1/1900	

[Add calibration record](#) [Back](#)

Next, CLICK the **Manage Yellow Pencil icon** next to the calibration record you wish to modify.

Some fields will be pre-populated, because the calibration record is already registered in the system. These fields are available to be updated or edited:



You are here: OPERATIONS > Calibration > Incremental Info

CALIBRATION INFORMATION

Equipment ID: CAL 04AF49C

Calibration Date: 9/15/2010
[Click to Calculate Next Calibration Due Date](#)

Next Calibration Due Date: 9/15/2011
By default, the next Calibration Due Date is determined from the Calibration Date entered above plus the Calibration Interval (in months) as specified during the Equipment Information entry.

As Received Condition: In Tolerance

Certificate Information:
 Enter a Calibration Certificate
 Fill Out Required Fields

If "Check to Replace current Certificate" box is not checked, the current certificate will be unchanged. If this box is checked the certificate that you upload will replace the current certificate.

Cost: 0

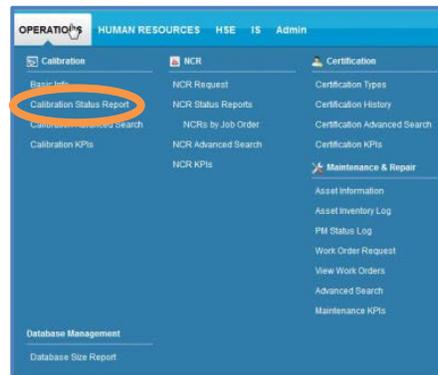
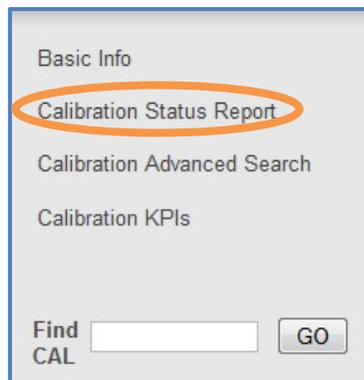
[Save](#)

Once you have entered the information, CLICK **Save**.

4.2.6 Deleting Equipment/Calibration Information

The **Calibration Status Report** page also allows users to delete Calibration Records or pieces of equipment.

To access the **Calibration Status Report** page, CLICK **Calibration Status Report** in the Left Menu or in the Top Menu of the Operations Tab.



The following screen will appear:

You are here: OPERATIONS > Calibration > Calibration Status Report

CALIBRATION STATUS REPORTS

Equipment Status:
 Calibration Status:
 Location:

Calibration Status Report Result

		EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
		CAL AA9C17F	Houston	Administrative	Scale	Taylor	2020W	077784001080	10/8/2013	10/8/2014	View Certificate	
		CAL D4AD928	Houston	Administrative	Tape Measure	Stanley	30-812	07617430812	11/9/2012	11/9/2013	View Certificate	

CLICK the **Red X Delete icon** to delete a piece of equipment.

		EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
		CAL AA9C17F	Houston	Administrative	Scale	Taylor	2020W	077784001080	10/8/2013	10/8/2014	View Certificate	
		CAL D4AD928	Houston	Administrative	Tape Measure	Stanley	30-812	07617430812	11/9/2012	11/9/2013	View Certificate	

To delete a calibration record, CLICK the **Magnifying Glass icon** on the **Calibration Status Report Results** page. The **Equipment Information** page that will appear gives you the option to delete the calibration record by CLICKING the **Red X Delete icon** at the bottom of the page.

Calibration Status Report Result

EquipmentID # CAL AA9C17F

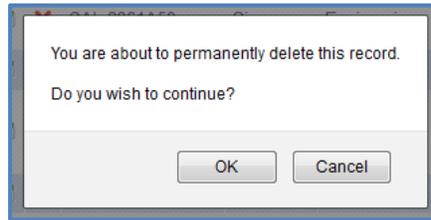
EQUIPMENT INFORMATION

Location	Houston	Department or Area	Administrative
Equipment Type	Scale	Manufacture / Brand	Taylor
Model Number	2020W	Serial Number	077784001080
Used as Calibration Standard	False	Owned By	Company/
Check Type	Calibration	Calibration Outsourced	True
Calibration Interval (in months)	12	Status	In Service
Short Description	Taylor 300LB capacity Scale		

CALIBRATION HISTORY

	CAL COMPANY	CAL DATE	DUE DATE	AS RECEIVED CONDITION	CERTIFICATE	CAL TECH
	Instrument Repair and Calibration, c.	10/17/2012	10/17/2013	In Tolerance	View Certificate	
	Instrument Repair and Calibration, c.	10/8/2013	10/8/2014	In Tolerance	View Certificate	

After you CLICK the **Red X Delete icon**, the following message box will appear:



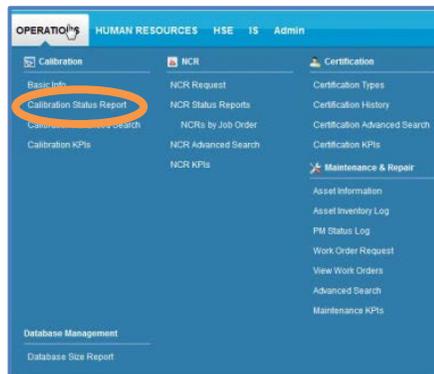
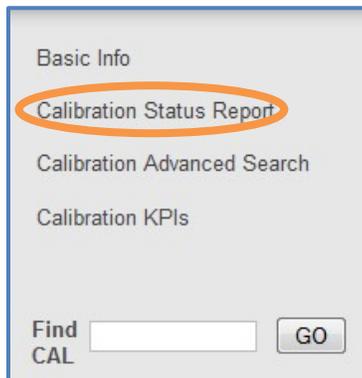
CLICK **OK** to delete the Calibration Record.

4.3 LOCATING A PIECE OF EQUIPMENT

There are various ways to locate a piece of equipment, to help you review, add, modify, or remove information/calibration data.

4.3.1 Using The Calibration Status Report

To access the **Calibration Status Report** page, CLICK **Calibration Status Report** in the Left Menu or in the Top Menu of the Operations Tab.



The following screen will appear:

You are here: OPERATIONS > Calibration > Calibration Status Report

CALIBRATION STATUS REPORTS

Equipment Status:
 Calibration Status:
 Location:

Calibration Status Report Result

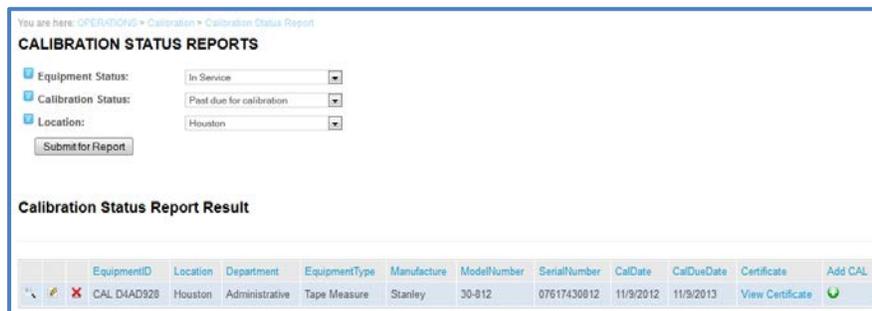
	EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
	CAL_AA9C17F	Houston	Administrative	Scale	Taylor	2020W	077784001080	10/8/2013	10/8/2014	View Certificate	
	CAL_D4AD928	Houston	Administrative	Tape Measure	Stanley	30-812	07617430812	11/9/2012	11/9/2013	View Certificate	

The top part of the page contains the following fields:

- **Equipment Status:** SELECT ALL, In Service, In Repair, Out of Service, or Inactive.

- **Calibration Status:** SELECT **ALL**, **Due for Calibration within a Month**, or **Past Due for Calibration**.
- **Location:** SELECT the **Location** where the equipment is currently being used or calibrated.

Note the keywords selected in the example below: Equipment Status- **In Service**, Calibration Status- **Past Due for Calibration**, and Location- **Houston**.



CALIBRATION STATUS REPORTS

Equipment Status: In Service
 Calibration Status: Past due for calibration
 Location: Houston

Calibration Status Report Result

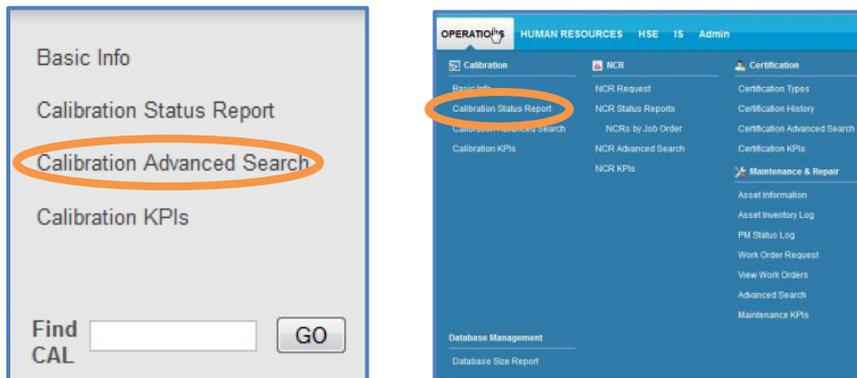
EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	CalDate	CalDueDate	Certificate	Add CAL
CAL D1AD928	Houston	Administrative	Tape Measure	Stanley	30-812	07617430812	11/9/2012	11/9/2013	View Certificate	

This search displays all equipment currently in service at the Houston location, and that is past due for calibration.

4.3.2 Calibration Advanced Search

Advanced Search is one of the most accurate ways to find a piece of equipment, because so many variables can be used to narrow your search results.

To access the **Calibration Advanced Search** page, **CLICK Calibration Advanced Search** in the Left Menu or in the Top Menu of the Operations Tab.:



The screen that will appear is divided into two parts. The Equipment Information section contains fields that pertain to basic equipment information. The Calibration Information section contains fields that pertain to calibration history.

You are here: OPERATIONS > Calibration > Calibration Advance Search

CALIBRATION ADVANCED SEARCH

Equipment Information

Equipment ID:
 Department or Area:
 Manufacture:
 Serial Number:
 Owned By: Company Employee Customer
 Calibration Outsourced: True False
 Employee:
 Range:

Calibration Information

Calibrating Company:
 Calibration Date From:
 Next Calibration Due Date From:
 Calibration Technician:
 Standard Used - Due Date From:

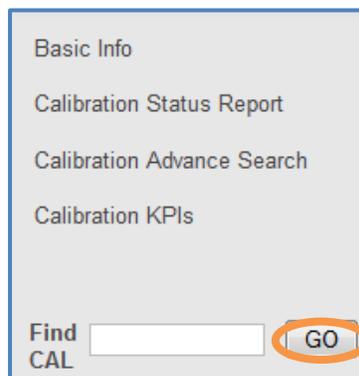
Location:
 Equipment Type:
 Model Number:
 Used as Calibration Standard: True False
 Check Type: Calibration Verification For Reference Each Use
 Status:
 Short Description:
 Accuracy:

As Received Condition:
 Calibration Date To:
 Next Calibration Due Date To:
 Standard Used - Due Date To:

You can **CLICK Submit for Search** at any time, either with all fields as they are or after you have made any selections or entries. If you enter data for any of the **Date From** fields, you must also enter data for the **Date To** fields.

4.3.3 Using The Find CAL Search/Go Button

The Calibration Left Menu has a **Go** button at the bottom of the menu:



When you **CLICK Go**, the Calibration Application displays all the pieces of equipment currently registered. Depending on your organization, this list could be very long or very short:

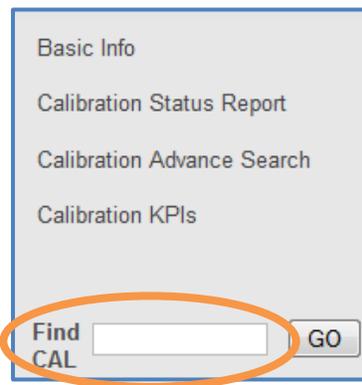
You are here: OPERATIONS > Calibration > Calibration Number Search Results

CALIBRATION NUMBER SEARCH LISTING

	EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	ShortDesc	CAL Date	CAL Due Date	Certificate	Add Calibration
	CAL 2B6D74B	Houston	Production	Scale	Barcor, Inc.	123			11/11/2013	5/11/2014		
	CAL 3667986	Singapore	Manufacturing	Dial Indicator	-- Please Choose --	HCS 410	NSN		5/1/2013	5/30/2013	View Certificate	
	CAL 6B8A22B	Singapore	Engineering	Coating Thickness	-	GM	57546		5/30/2013	5/30/2014		
	CAL 9F64814	Chicago	Quality Lab	Glass Mercury Thermometer	N/A	INM 60 mm	NSN		6/12/2013	6/12/2014		

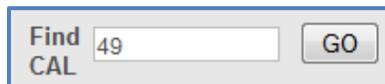
NOTE: This is by far the easiest way to bring up all the pieces of equipment currently in the system. You can SCROLL down or sort until you find the needed piece of equipment

The Calibration Left Menu has a **Find CAL** area at the bottom of the menu:



If you know even just a few characters of the Equipment ID, you can TYPE it in **here**, CLICK **Go**, and all equipment with those characters will be displayed.

For example, let us look for equipment 04AF49C. TYPE “49” in the Find CAL box:



When we CLICK **Go**, the results include only the piece of equipment that matches those characters:

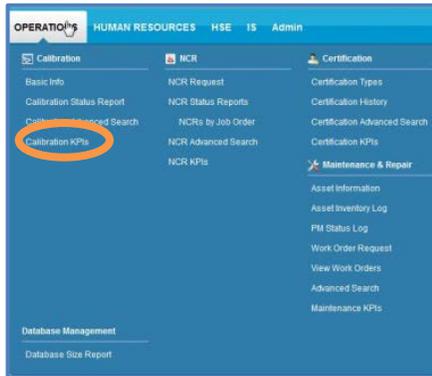
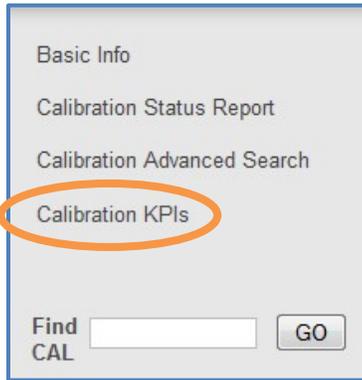
You are here: OPERATIONS > Calibration > Calibration Number Search Results

CALIBRATION NUMBER SEARCH LISTING

	EquipmentID	Location	Department	EquipmentType	Manufacture	ModelNumber	SerialNumber	ShortDesc	CAL Date	CAL Due Date	Certificate	Add Calibration
	CAL 04AF49C	Chicago	Quality Lab	Multi-Range Conductivity Meter	Hanna	HI 9033	08152955	test	3/1/2012	3/1/2013		

4.4 CALIBRATION KEY PERFORMANCE INDICATORS (KPIs)

Key Performance Indicators (KPIs) display real-time Calibration Information in a graphical format. To access the **Calibration KPIs** page, CLICK **Calibration KPIs** in the Left Menu or in the drop down menu of the Operations Tab.



The following page will appear:

You are here: [OPERATIONS](#) > [Calibration](#) > [Calibration KPIs](#)

CALIBRATION KEY PERFORMANCE INDICATORS

Site: Department or Area: Equipment Type: Manufacturer: Equipment Status: Calibration Status:

Calibration Due Date From: Calibration Due Date To:

[Run Report and Chart](#)

If you wish to view KPIs for the whole set of data, **CLICK Run Report and Chart**. If, however, you wish to view a subset of KPI data, you can narrow the range of information used in creating the KPI graphs by using the available filters, which are as follows:

- **Site:** SELECT the **Site** where the equipment is located, used, or stored.
- **Department or Area:** SELECT the specific **Department** or **Area** where the equipment is located.
- **Equipment Type:** ENTER the **Type** of equipment.
- **Manufacturer:** SELECT the **Manufacturer** or **Brand** of the equipment.
- **Equipment Status:** SELECT the equipment status (**In Service, In Repair, Out Of Service, or Inactive**).
- **Calibration Status:** SELECT the Calibration status (**Due for calibration within a month, Due for calibration within two months, or Past due for calibration**).
- **Calibration Date Due From:** ENTER the **Start of a Time Range** during which equipment is due for calibration. (**NOTE:** Must be filled out in conjunction with **Calibration Date Due To**.)
- **Calibration Date Due To:** ENTER the **End of a Time Range** during which equipment is due for calibration. (**NOTE:** Must be filled out in conjunction with **Calibration Date Due From**.)

Once you have narrowed down the range of information, **CLICK Run Report and Chart**. At the top of the page, you will see a report containing information about the equipment currently recorded in the system.

Equipment ID	Location	Department	Equipment Type	Manufacture	Model Number	Serial Number	Status	Calibration Date	Calibration Due Date	Cost
CAL_9F64814	Chicago	Quality Lab	Glass Mercury Thermometer	N/A	INM 60 mm	NSN	In Repair	10/6/2010 12:00:00 AM	10/6/2011 12:00:00 AM	0
CAL_9F64814	Chicago	Quality Lab	Glass Mercury Thermometer	N/A	INM 60 mm	NSN	In Repair	10/15/2010 12:00:00 AM	10/15/2011 12:00:00 AM	0
CAL_9F64814	Chicago	Quality Lab	Glass Mercury Thermometer	N/A	INM 60 mm	NSN	In Repair	10/15/2010 12:00:00 AM	10/15/2011 12:00:00 AM	0
CAL_3667986	Singapore	Manufacturing	Dial Indicator	-- Please Choose --	HCS 410	NSN	In Service	5/26/2010 12:00:00 AM	5/26/2011 12:00:00 AM	0
CAL_3667986	Singapore	Manufacturing	Dial Indicator	-- Please Choose --	HCS 410	NSN	In Service	12/19/2011 12:00:00 AM	12/19/2012 12:00:00 AM	0

If you wish to further analyze the data, download this report as an Excel spreadsheet by **CLICKING Excel**.

Site
All ▼

Calibration Due Date From
 31

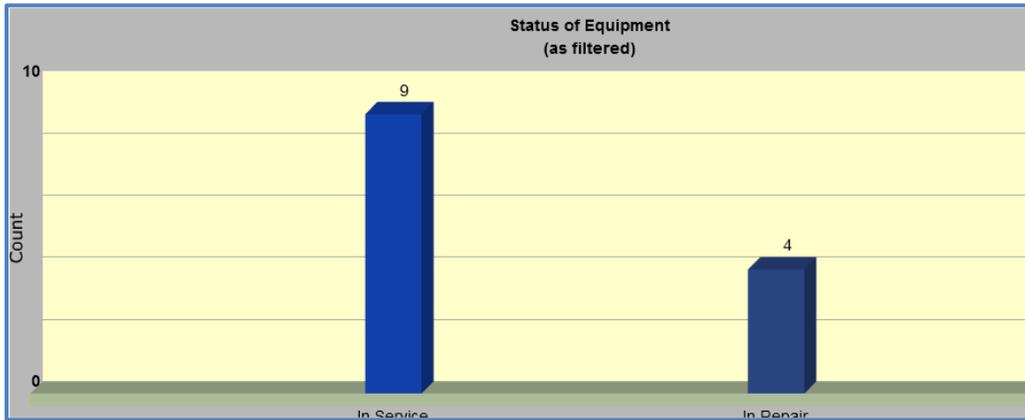
Run Report and Chart

1	2	3	4	
Equipment ID		Location		
CAL 253F227		Houston		
CAL 253F227		Houston		
CAL 253F227		Houston		
CAL 2B6D74B		Houston		
CAL 3667986		Singapore		

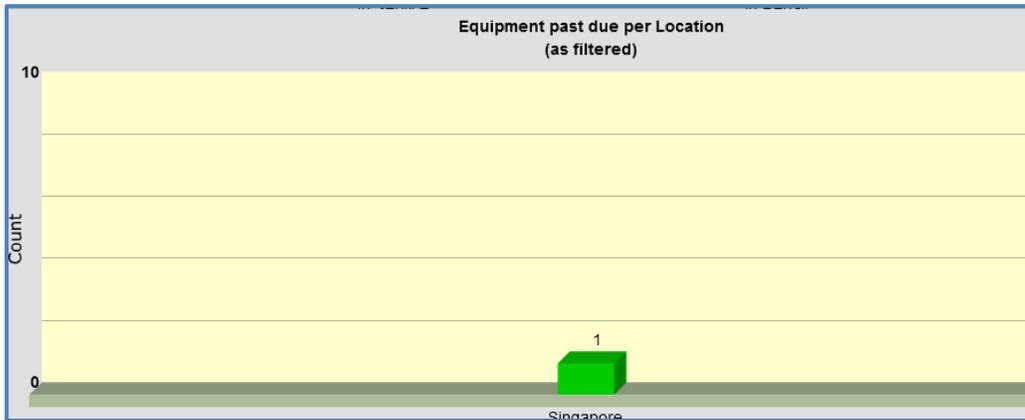
Excel

Below the report are several graphs which display real-time information about your company's KPIs, which may include:

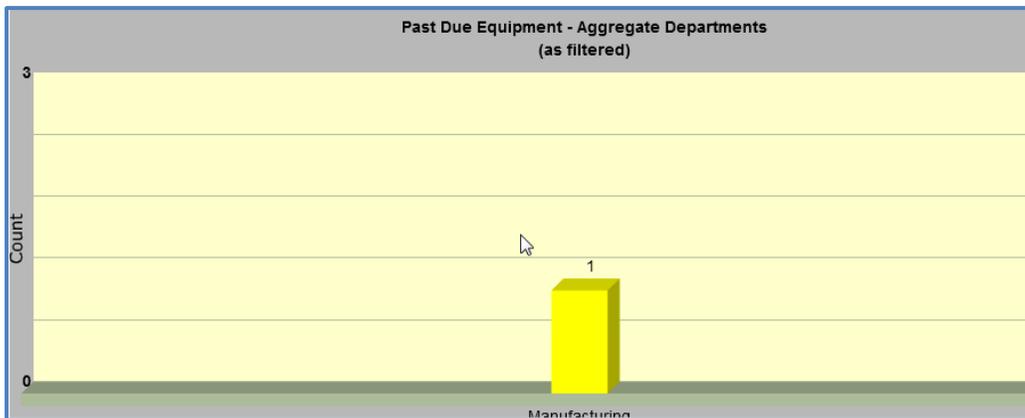
- **Status of Equipment:** shows how many pieces of equipment are In Service, In Repair, or Out of Service.



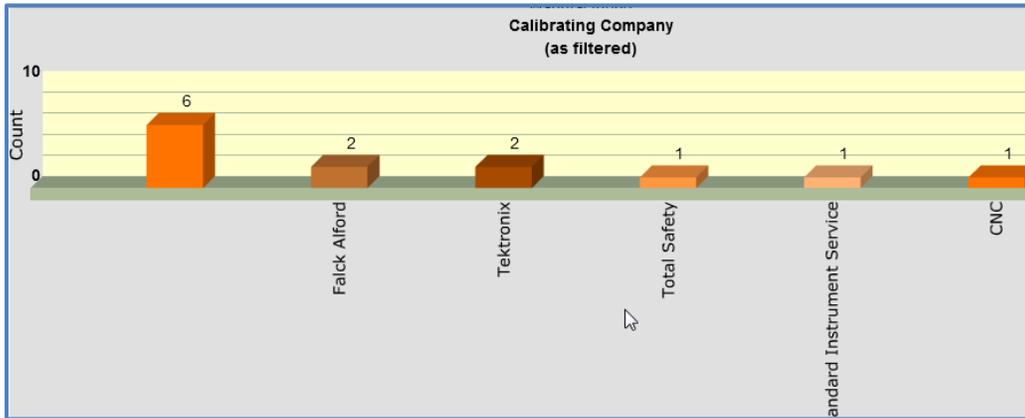
- **Equipment past due per Location:** Shows just the selected location and breaks down the past due items by department.



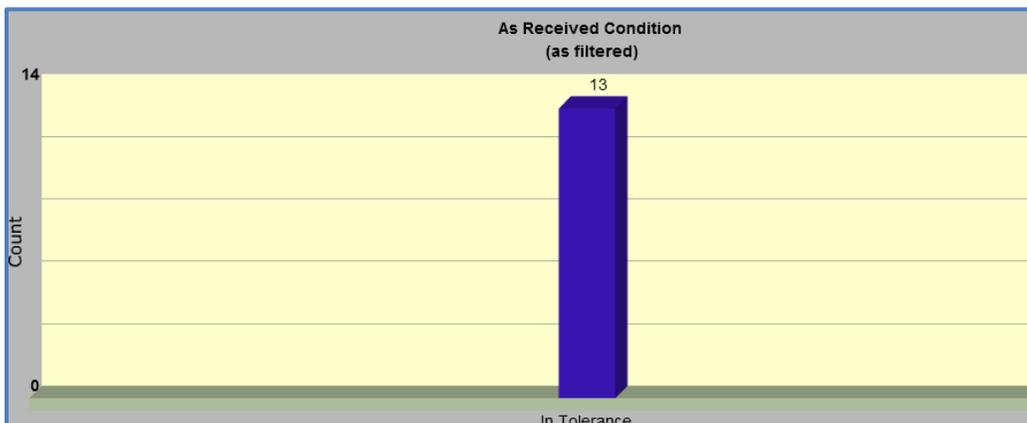
- **Past Due Equipment for Aggregate Departments:** Shows past due Calibrations per department by counting each piece of equipment that is past due for Calibration.



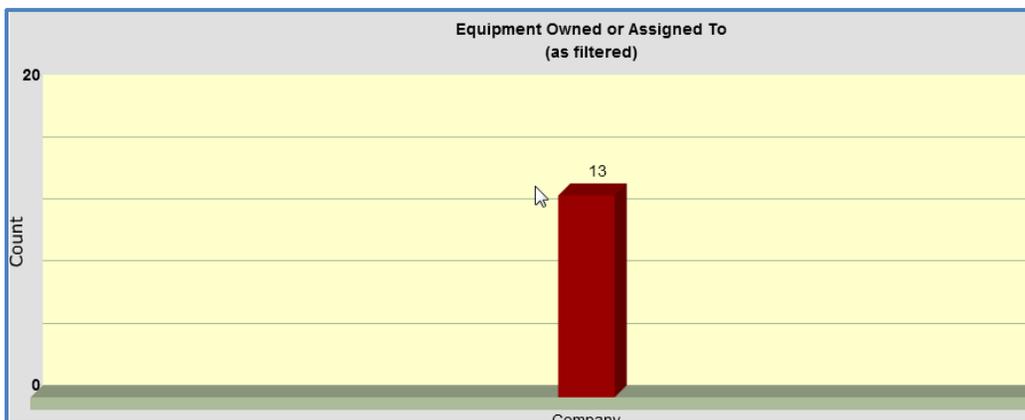
- **Calibrating Company:** Shows how many calibrations per Calibration Company have been performed in the past 12 months.



- **As Received Condition:** Shows how many pieces of equipment were received In Tolerance vs. Out of Tolerance.



- **Equipment Owned by or Assigned To:** Shows how many pieces of equipment are owned by which owner.



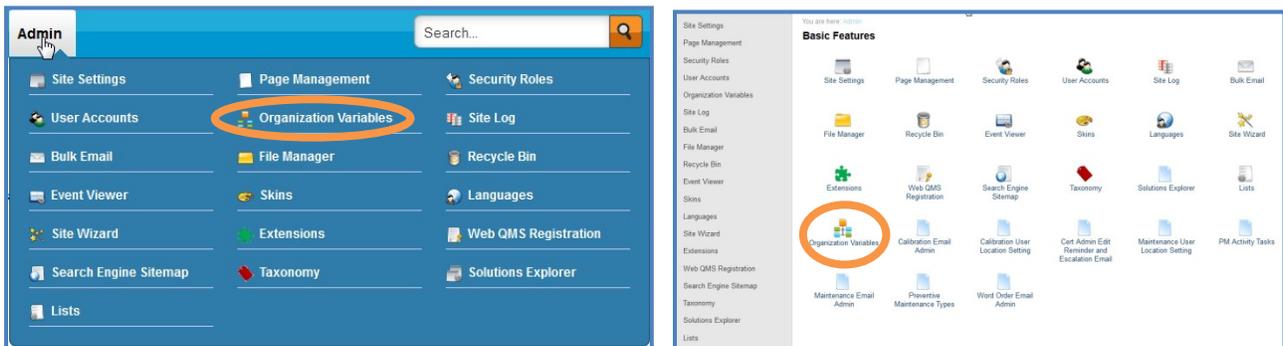
- **Cost of Calibration per Location:** Shows a 6 month range of Calibration cost per location.



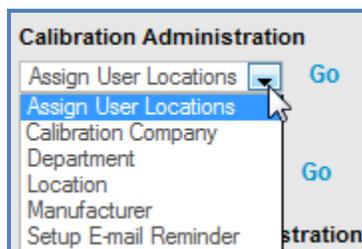
NOTE: If a chart does not display it may be because no data is available for the filters used.

4.5 CALIBRATION ADMINISTRATION

The Calibration Administration Application area allows the Administrator to change the options in the drop down menus throughout the application, as well as set up email reminders. In order to access the Calibration Administration area, you must have the Administrator role. To access the area, **CLICK Organization Variables** in the Left Menu of the **Admin** page, in the body of the **Admin** page, or in the Top Menu of the Admin Tab:



On the left side of the page, locate the **Calibration Administration** box. The drop down menu below the title will allow you to change options throughout the application. This menu contains the following sections:

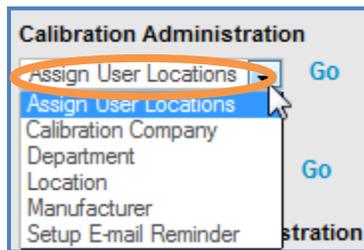


- Assign User Locations
- Calibration Company
- Department
- Location
- Manufacturer
- Setup E-mail Reminder

4.5.1 Assigning/Removing User Locations

When users are assigned a Calibration Technician role (refer to the procedure **Authorizing/Unauthorizing Users on Web QMS**), the location for which they have authority for calibration purposes needs to be identified. This helps with the email reminders, which are sent based on the user’s location. This means that after users have been assigned the Calibration Technician role, an Administrator needs to assign them a specific location in the **Assign User Locations** page so that they can receive emails about equipment that is nearly due, or past due, for calibration for their specific assigned locations. To assign a user a location, follow the steps below:

SELECT **Assign User Locations** in the Calibration Administration drop down menu, then **CLICK Go**.



The following page will appear:

You are here: Admin > Organization Variables > Calibration User Location Setting

CALIBRATION USER LOCATION SETTING

User: -- Please select a user --

Location:

- Chicago
- Houston
- Lima
- San Diego
- Singapore

The locations you pick will replace the current assigned locations for the selected user. If no location is selected and you submit, all locations will be removed for the user.

SubmitAction

Assigned Locations to Users

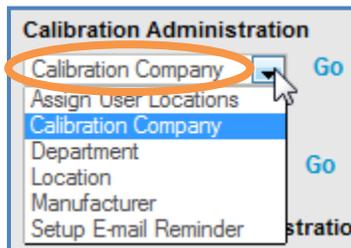
User ID	Employee Name	Location
154	Mireaux Partner	Houston
114	Mireaux User	Singapore
124	Mireaux Admin	Chicago
124	Mireaux Admin	Houston
207	Jing Yang	Chicago
207	Jing Yang	Houston

SELECT a **User** from the list and CHECK the **Locations** you wish to assign to that user. CLICK **Submit Action** to save the setting. Note that the locations selected will replace the locations currently assigned to the user.

Remove locations from users by SELECTING the **User** and CLICKING **Submit Action** without SELECTING any locations.

4.5.2 Adding/Editing/Removing Calibration Companies

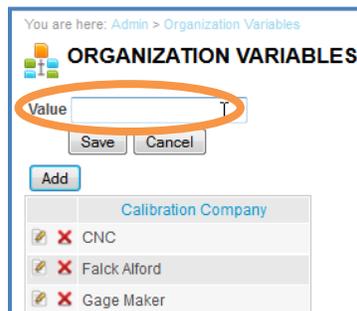
SELECT **Calibration Company** in the Calibration Administration drop down menu, then CLICK **Go**.



The following page will appear:



CLICK **Add** to add another value to the Calibration Company list. ENTER the value to be added into the **Value** field. CLICK **Save**.



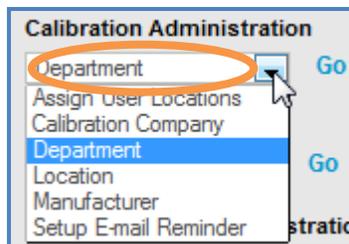
To edit or delete an existing value from the Calibration Company drop down menu:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows users to edit an existing Calibration Company value.
- **Delete:** CLICKING the **Red X Delete icon** allows users to delete an existing Calibration Company value from the list.

Calibration Company	
 	CNC
 	Falck Alford
 	Gage Maker
 	Hedland
 	Houston Precision Inc.
 	Matherne Instrumentation

4.5.3 Adding/Editing/Removing Departments

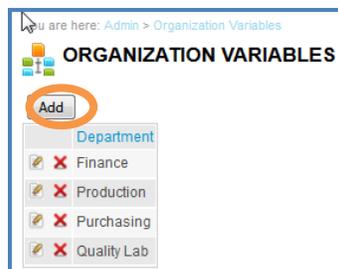
SELECT **Department** in the Calibration Administration drop down menu, then CLICK **Go**.



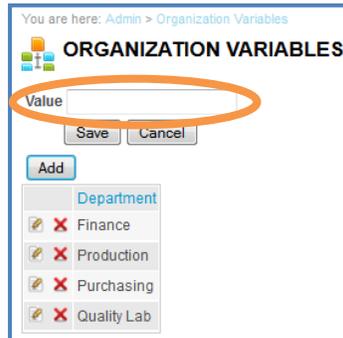
The following page will appear:



CLICK **Select** to view all the departments available at that location. In this example, there are 4 departments.

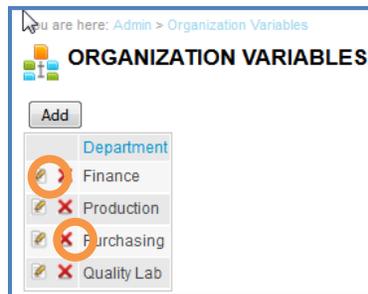


CLICK **Add** to add another value (for example, “Sales”) to the Department list. ENTER the value to be added into the **Value** field. CLICK **Save**.



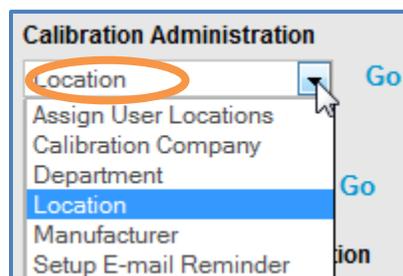
To edit or delete an existing value from the Department list:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows users to edit an existing Department value.
- **Delete:** CLICKING the **Red X Delete icon** allows users to delete an existing Department value from the list.

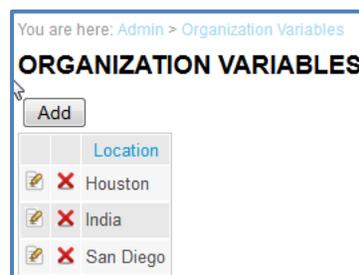


4.5.4 Adding/Editing/Removing Locations

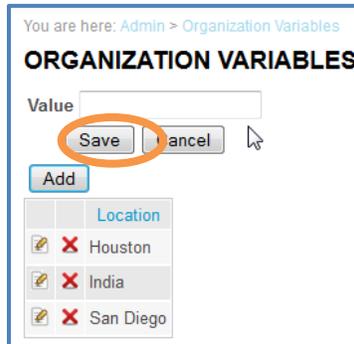
SELECT **Location** in the Calibration Administration drop down menu, then CLICK **Go**.



The following page will appear:

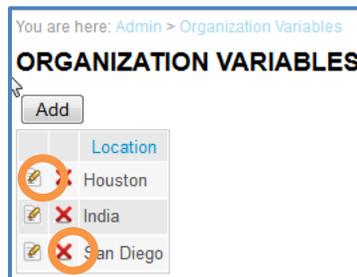


CLICK **Add** to add another value to the Location list. ENTER the value to be added into the **Value** field. CLICK **Save**.



To edit or delete an existing value from the Location list:

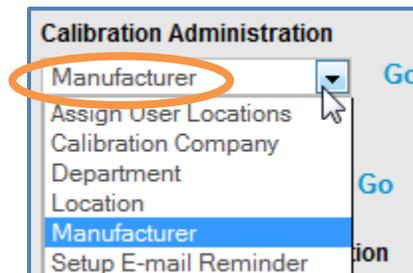
- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows users to edit an existing Location value.
- **Delete:** CLICKING the **Red X Delete icon** will allow you to delete an existing Location value from the list.



NOTE: If you wish to delete a location, you must first delete all departments which are associated with that location.

4.5.5 Adding/Editing/Removing Manufacturer

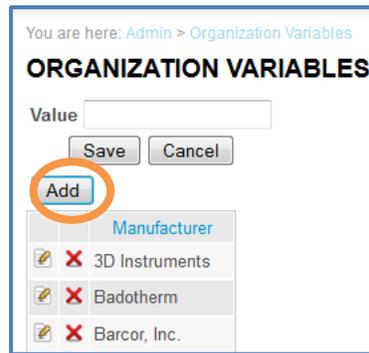
SELECT **Manufacturer** in the Calibration Administration drop down menu, then CLICK **Go**.



The following page will appear:

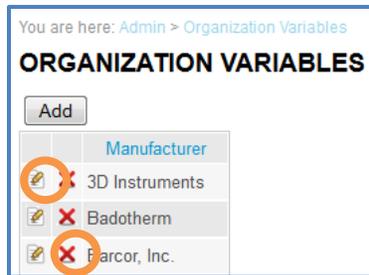


CLICK **Add** to add another value to the Manufacturer list. ENTER the value to be added into the **Value** field. CLICK **Save**.



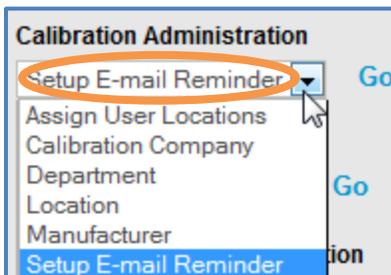
To edit or delete an existing value from the Manufacturer list:

- **Edit:** CLICKING the **Manage Yellow Pencil icon** allows users to edit an existing Manufacturer value.
- **Delete:** CLICKING the **Red X Delete icon** allows users to delete an existing Manufacturer value from the list.



4.5.6 Setup E-Mail Reminder

SELECT **Setup E-mail Reminder** in the Calibration Administration drop down menu, then CLICK **Go**.



The following page will appear:

You are here: [Admin](#) > [Organization Variables](#) > [Calibration Email Admin](#)

CALIBRATION EMAIL REMINDER

Email From:

Email Subject:*

Email Reminder Message:*

ABC [Icons] [Custom Links]

[Icons]

B *I* U abc x' x: [Icons]

Font Name Size [Icons]

Paragraph Style Apply CSS Cl... [Icons]

Dear \$(Firstname) \$(Lastname):

This is an email reminder from the Mireaux QMS Calibration program. The following equipment is either past due for calibration or due for calibration in the upcoming month:

\$(ReminderDetails)

Please ensure that the equipment past due for calibration is

[Design] [HTML] [Preview] Words: 71 Characters: 461

Send to Global Calibration Admin (admin for all locations): Yes No

Select a User to Escalate Email To:

Number of Days Before Calibration Due Date:*

NOTE: Fields marked with a red asterisk are required.

The **Calibration Email Reminder** page contains the following fields:

- **Email From:** ENTER the **email address** that you would like to appear on the email reminders.
- **Email Subject:** ENTER the email **subject**.
- **Email Reminder Message:** This area is pre-populated with an automated reminder message. REVIEW and MODIFY as necessary in the rich text field; however, do not EDIT any areas which look like **\$(this)**.
- **Send to Global Maintenance Admin (admin for all locations):** SELECT whether the **Global Calibration Admin** should also receive reminder emails.
- **Select a User to Escalate Email to:** If you want a manager or other member of your organization who does not have the Calibration Technician or Global Calibration Admin roles to also get the reminder emails, SELECT that **User** here.
- **Number of Days Before Calibration Due Date:** ENTER the **Number of Days** before the calibration due date you want the system to look ahead. The default is 30 days, however, you can edit this as necessary.

5.0 REVISION LOG

DATE	SECTION	DESCRIPTION OF CHANGE	APPROVED BY
02/06/2010	All	Original Release of MMS-WQM-214 Calibration Admin Guide and MMS-WQM-215 Calibration User Guide	M. Boudreaux
01/12/2012	All	MMS-WQM-214 formatting, adjusted the size and position of the picture.	M. Boudreaux
01/13/2012	All	MMS-WQM-215 formatting adjusted the size and position of the pictures and added some pictures as necessary.	M. Boudreaux
3/14/2012	4.2.2.1 Header Index	Added note for date on MMS-WQM-214 and changed to Application on MMS-WQM-215.	M. Boudreaux
05/16/2012	4.4.1	Added more content at the beginning of this section to introduce this function on MMS-WQM-214	M. Boudreaux
07/09/2012	All	MMS-WQM-214 updated to include application enhancements and skin changes.	M. Boudreaux
01/31/2014	All	Revision and integration of MMS-WQM-214 and MMS-WQM-215. Released as MXM-WQM-507 Calibration Application Manual.	M. Boudreaux
06/01/2014	All	Revision, editing, and formatting performed throughout Calibration Application Manual.	M. Boudreaux



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