A Guide to Standardizing Digital Calibration and Measurement Capabilities

Mark Kuster, mjk@ieee.org

NCSLI 141 MII and Automation Committee

Measurement-Information Infrastructure

SIM-MWG14 12th M4DT-Day

Section 1

Introduction

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2 Measurand Taxonomy for Digital Transformation

3 Air-Flow Taxon and CMC Example



2 Measurand Taxonomy for Digital Transformation

3 Air-Flow Taxon and CMC Example

4 Further Examples



2 Measurand Taxonomy for Digital Transformation

3 Air-Flow Taxon and CMC Example

4 Further Examples



Acronyms

- DX—digital transformation
- IQI—international quality infrastructure
- SoA—scope of accreditation
- DCC—digital calibration certificate (PTB)
- CMC—calibration and measurement capability
- MPE—maximum permissible error
- NCSLI—NCSL International
- M-Layer—metrology information layer to support measurement systems

Definition

MII (measurement information infrastructure)

—set of normative standards that unambiguously define data structures, taxonomies, service protocols and security for locating, communicating and sharing measurement information

Result International and the MII

NCSL International

- Established 1960, now at https://ncsli.org/
- Volunteer-driven, measurement-science professional organization
- Annual conference, standards & practice publications, tutorials, webinars
- Metrologist magazine, Measure journal
- NCSL International 141 MII and Automation Committee
 - Reformulated at the 2015 annual conference
 - Chartered to develop MII digital documents and facilitate related products
 - Updates in Metrologist and Cal Lab
 - Also see http://miiknowledge.wikidot.com/

Section 2

Measurand Taxonomy for Digital Transformation

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Progress	Music Market	Metrology
manual		
analog		
digitized		
digitalized		
digitally transformed		

Progress	Music Market	Metrology
manual	hire musicians	typewritten paper certs
analog		
digitized		
digitalized		
digitally transformed		

Progress	Music Market	Metrology
manual	hire musicians	typewritten paper certs
analog	records, tapes	automated paper certs
digitized		
digitalized		
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manual	hire musicians	typewritten paper certs
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digitized	compact disc	PDF certs (mostly)
digitalized		
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Progress	Music Market	Metrology
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digitalized	tagged MP3 files	?
digitally transformed		

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manual	hire musicians	typewritten paper certs
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digitized	compact disc	PDF certs (mostly)
digitalized	tagged MP3 files	?
digitally transformed	Pandora, SiriusXM	?

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digitally transformed	Pandora, SiriusXM	new innovation

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digitally transformed	Pandora, SiriusXM	new innovation

Metrology's DX has begun but lags other industries:

• science, manufacturing, travel, banking, entertainment, ...

Simple digitization will not suffice.

Partial Metrology Information Flow



The Measurement-Information Infrastructure and the M-Layer

- M-Layer aspect IDs disambiguate quantities for digital processing: calculations, uncertainty propagation, etc.
 - $q [Q] \langle \text{voltage} \rangle$
 - $q [Q] \langle \text{pressure} \rangle$
 - 1990 Conventional Voltage differs from SI-9 voltage differs from SI-8 voltage.
- MII taxons disambiguate full measurands for communicating measurement information in digitalized documents.
 - Source.Voltage.AC.Sinewave[.RearOutput]
 - Measure.Pressure.Pneumatic.Differential.Static[.Port1]
- Each MII taxon's quantity token uniquely maps to an M-Layer aspect ID.

Section 3

Air-Flow Taxon and CMC Example

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Air-Flow Example

Why air flow?

- complex enough to illustrate most cases
- tackles a measurement area not yet developed

We'll develop a measurand taxon and associated CMC TEMPLATE step-by-step. MII editor tools will facilitate this process.

Step 0: Understand the measurement process! Imaginary scenario:

- We have air-flow measurement experience and will learn as we go.
- We calibrate mass and volume flow meters with air and dry nitrogen.
- The MII has no existing taxon for air flow.
- The MII (M-Layer) has defined no relevant quantity token (aspect).

Step 1.1: Select the process type.

Example Taxon: Source

Example CMC Table

Measurand	Uncertainty	Comments
		Source for calibrating flow meters

Rule: A taxon's first token represents the process type, taking either the value Measure or Source to identify an input- or output-quantity measurement, respectively.¹

Step 1.2: Separate tokens with a period.

Example Taxon: Source.

Example CMC Table

Measurand	Uncertainty	Comments
		Source for calibrating flow meters

Rule: Each taxon comprises a series of tokens separated by the period (.) character.

Step 1.3: Add the measured-quantity name.

Example Taxon: Source.air flow

Example CMC Table

Measurand	Uncertainty	Comments
		Source for calibrating flow meters

Rule: The taxon's remaining tokens indicate the measured quantity.

Step 1.4: Create a human-readable alias.

Example Taxon: Source.air flow

Example CMC Table

Measurand	Uncertainty	Comments
Air Flow		Source for calibrating flow meters

Rule: Each taxon may have aliases, such as commonly used equivalents (from *ISO-IEC 80000*, the KCDB, an AB's conventions, etc.). These aliases may appear in human-readable documents generated from the digital document as the user prefers.

Step 1.5: Format the tokens.

Example Taxon: Source.AirFlow

Example CMC Table

Measurand	Uncertainty	Comments
Air Flow		Source for calibrating flow meters

Rule: Each token uses the UpperCamelCase¹ naming convention.

¹also known as Pascal or Capitalized

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Step 1.6: Check against the MII quantity database.

Example Taxon: Source.AirFlow??

Example CMC Table

Measurand	Uncertainty	Comments	
Air Flow		Source for calibrating flow meters	

Rule: The measured quantity's first token identifies the quantity kind, which the taxonomy uniquely name and link to an M-Layer Aspect ID.

Researching Quantity Names

Names from recognized bodies:

- KCDB: "fluid flow" (with "gas flow" or "liquid flow" and species)
- ISO-IEC 80000: "mass flow rate" and "volume flow rate"
- NVLAP: "[20/M05] Flow Rate", plus "liquid flow" and "gas flow"
- DAkkS: 'Gas flow rate", "Volume of flowing gases", and "Mass of flowing gases"

Neither names nor quantities consistent!

No problem-building this taxon for digital documents solves that.

Researching Quantity Names

Looking at approved SoAs from various ABs and Laboratories, we additionally find "Mass Flow", "Liquid Flow", "Gas Flow", "Flow - Air", "Flow - Gas", "Flow - Liquid", "Flow - Gas (Air)", "Air/Nitrogen Flow", "Flow Rate by Volume", "Air Volume Flow", "Flow Hydraulic", "Fuel Flow", "Flow Rate by Volume for Compressible Gas", "Volumetric Flow Rate (Water)", "Liquid Flow Rate Inline", "Liquid Flow Rate Non-Intrusive", "Gas Flow - Leak", "Gas Leak", "Gas Flow Rate Into Vacuum", "mole-flowrate", "Flow Meter Factor", "Flow Calibration Factor", "Flow Meter", "Determination of Flow Meter" (by gas or liquid species), "Electrical Output of Flow & Pressure Devices",

and many other categorizations by flow instrumentation.

Further confusion: melt-flow index, flow velocity, air velocity, evaporation, load rate. Wow!

Researching Quantity Names

Sorting it out for the taxonomy:

- Unique quantity kinds: mass flow, volume flow, ratios, coefficients
- The MII taxonomy already defines Ratio and Coefficient.
- Mass flow covers leaks.
- Fluids include gases and liquids but their measurement processes differ.
- A species-type property would identify the fluid.
- Both inline and non-intrusive Measure processes exist, though the Source process seems the same.

Solution: Propose adding MassFlowRate and VolumeFlowRate to the MII quantity-kind list.

Step: Organize a Hierarchical Taxonomy Tree

- Source.MassFlowRate.Gas
- Measure.MassFlowRate.Gas.Inline
- Measure.MassFlowRate.Gas.NonIntrusive
- ... MassFlowRate.Liquid...
- Source.VolumeFlowRate.Gas
- Measure.VolumeFlowRate.Gas.Inline
- Measure.VolumeFlowRate.Gas.NonIntrusive
- ...VolumeFlowRate.Liquid...
- Source.Ratio.MassFlowRate.Gas.MeterFactor
- Source.Coefficient.Voltage.MassFlowRate.DC.Gas

Only the whole taxon has machine meaning; individual tokens (except Measure and Source) only facilitate development.

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Step 1.6: Check against the MII quantity database.

Example Taxon: Source.MassFlowRate

Example CMC Table

Measurand	Uncertainty	Comments
Mass flow rate		Source for calibrating flow meters

Rule: The measured quantity's first token identifies the quantity kind, which the taxonomy uniquely name and link to an M-Layer Aspect ID.

Step 1.7: Completely qualify the measurand.

Example Taxon: Source.MassFlowRate.Gas.AmbientAir

Example CMC Table

Measurand	Uncertainty	Comments
Mass flow rate		Source for calibrating inline or non-
Gas: ambient air, dry nitrogen		intrusive flow meters

Rule: Any further tokens after the quantity-kind token hierarchically qualify the quantity, proceeding from more general toward more specific quantity descriptors.

Step 1.8: Omit qualifiers that do not change the measurement process.

Example Taxon: Source.MassFlowRate.Gas

Example CMC Table

Measurand	Uncertainty	Comments
Mass flow rate		Source for calibrating inline or non-
Gas: ambient air, dry nitrogen		intrusive flow meters

Rule: Parameters substitute for additional tokens to distinguish details within the same measurement process.

Source.Temperature.Simulated.Thermocouple (types by parameter) Source.Temperature.Simulated.PRT (resistance instead of voltage)

Step 2: Define the Measurand

A clear human-readable definition helps (M-Layer!)

- disambiguate one measurand from another,
- select the correct measurand from a list,
- determine whether the measurand of interest appears in the taxonomy or requires a new entry or differentiation.

Find a suitable definition in a textbook, standard, or other source.

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Find a suitable definition in a textbook, standard, or other source. In our case, we find a succinct mathematical definition in *ISO-IEC 80000*: $q_m = dm/dt$ We might then expound upon that to give more explanation:

This process sources a reference mass flow rate of gas for calibrating gas flow meters. The instantaneous mass flow rate q_m equals dm/dt, sometimes estimated as $\Delta m/\Delta t$ using the total mass Δm flowing through a defined space in time Δt .

If a probability equals p only under conditions (x, y, z), then we abuse the facts to quote the probability without stating the conditions.

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Similarly, we devalue calibration without fully knowing and stating the measurement conditions, the measurand's state. (Calibrate as used, use as calibrated! How? Define the state!)

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Similarly, we devalue calibration without fully knowing and stating the measurement conditions, the measurand's state.

(Calibrate as used, use as calibrated! How? Define the state!)

- Specifying the measurand's full state restricts its *definitional* uncertainty.
- Unrecognized definitional uncertainty may swamp other uncertainty components.
- At worst, it will exceed the instrument MPE specification, essentially making the calibration worthless.

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Similarly, we devalue calibration without fully knowing and stating the measurement conditions, the measurand's state. (Calibrate as used, use as calibrated! How? Define the state!)

Define the measurand's state via "parameters" included as metadata in instrument specifications, calibration certificates and SoA CMCs.

- Influence quantity values (e.g., frequency in AC voltage)
- Input quantity values (e.g., temperature for length correction)
- Property values (e.g., thermocouple type)
- Instrument operating conditions (might challenge some labs)

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Step 3.1: Research the measurand's calibration processes to generalize the template.

- Mass flow rate
- Gas Type
- Gas Temperature
- Gas Pressure
- Gas Relative Humidity
- Gas Compressibility
- Reference Temperature
- Reference Pressure

- Reference Relative Humidity
- Reference Compressibility
- Ambient Temperature
- Ambient Pressure
- Ambient Relative Humidity
- Outlet Pressure
- Reynolds Number
- Gas Velocity

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Not all parameters matter for a given laboratory or customer—uncertainty level and instrument type.

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Step 3.2: Classify parameters as required or optional (default-valued).

- Mass flow rate
- Gas Type
- Gas Temperature
- Gas Pressure
- Gas Relative Humidity
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- Reference Temperature
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- Reference Relative Humidity
- Reference Compressibility
- Ambient Temperature
- Ambient Pressure
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Step 3.2: Classify parameters as required or optional (default-valued).

- Mass flow rate (R)
- Gas Type
- Gas Temperature
- Gas Pressure
- Gas Relative Humidity
- Gas Compressibility
- Reference Temperature
- Reference Pressure

- Reference Relative Humidity
- Reference Compressibility
- Ambient Temperature
- Ambient Pressure
- Ambient Relative Humidity
- Outlet Pressure
- Reynolds Number
- Gas Velocity

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- Mass flow rate (R)
- Gas Type (O)
- Gas Temperature (O)
- Gas Pressure (O)
- Gas Relative Humidity (O)
- Gas Compressibility (O)
- Reference Temperature (O)
- Reference Pressure (O)

- Reference Relative Humidity (O)
- Reference Compressibility (O)
- Ambient Temperature (O)
- Ambient Pressure (O)
- Ambient Relative Humidity (O)
- Outlet Pressure (O)
- Reynolds Number (O)
- Gas Velocity (O)

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- Gas Compressibility (O)
- Reference Temperature (O)
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- Reference Relative Humidity (O)
- Reference Compressibility (O)
- Ambient Temperature (O)
- Ambient Pressure (O)
- Ambient Relative Humidity (O)
- Outlet Pressure (O)
- Reynolds Number (O)
- Gas Velocity (O)

Laboratories may change the required-optional assignment and omit parameters altogether in their CMCs. 18/33

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Example Human-Readable MII Air-Flow Taxon

Source.MassFlowRate.Gas

This process sources a reference mass flow rate of gas for calibrating gas flow meters. The instantaneous mass flow rate q_m equals dm/dt, sometimes estimated as $\Delta m/\Delta t$ using the total mass Δm flowing through a defined space in time Δt .

• Required Parameters (with ranges)

• Mass flow rate

• Optional Parameters (with ranges)

- Gas Type
- Gas Temperature
- Gas Pressure
- Gas Relative Humidity
- Gas Compressibility
- Reference Temperature

- Reference Pressure
- Reference Relative Humidity
- Reference Compressibility
- Ambient Temperature
- Ambient Pressure
- Ambient Relative Humidity
- Outlet Pressure
- Reynolds Number
- Gas Velocity

Example Human-Readable CMC

Measurand	Uncertainty	Comments
Mass flow rate, 1 slpm to 1000 slpm Gas: <u>ambient air</u> , dry nitrogen Gas Temp. (inlet): <u>23 °C</u> Gas Pressure (inlet): <u>800 kPa</u> 100 kPa to 1000 kPa Gas Relative Humidity: <u>45 %</u> Ref. Temperature: <u>20 °C</u> Ref. Pressure: <u>101.325 kPa</u> Ref. Relative Humidity: <u>36 %</u> Ref. Compressibility: <u>0.9997</u> Ambient Temperature: <u>23 °C</u> Ambient Pressure: <u>800 kPa</u> 	±0.3% of reference value*	Source for calibrating inline or non- intrusive flow meters
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Section 4

Further Examples

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Microphone Sensitivity Example—Description

Measurand Quantity: Pressure sensitivity (ratio of dynamic output voltage to dynamic pressure), typically expressed as a logarithmic level quantity relative to 1 V/Pa

Primary Calibration Method: Reciprocal measurements between pairs of microphones under controlled conditions per IEC 61094-2. The results trace to fundamental electrical, mechanical and physical parameters such as DC voltage, frequency, air density, temperature, static pressure, etc. The method therefore requires no standard microphone.

Secondary Calibration Method: Comparison between the unknown microphone and a standard microphone

Microphone Sensitivity Example—CMC and Service Data

One KCDB CMC:

- Quantity Value: Pressure sensitivity level
- Unit: dB (reference: 1 V/Pa)
- \bullet Instrument: Measurement microphone type LS1P (nominal sensitivity -26.5 dB at 20 $^\circ\text{C})$
- Method: IEC 61094-2:2009
- Parameter: Frequency, Parameter Value: 25 Hz to 62 Hz
- Uncertainty (k = 2): 0.05 dB

NRC Service: A33-01-01-01 Pressure sensitivity level of measurement microphone by the reciprocity technique. Up to two Laboratory Standard measurement microphones of the same type by the reciprocity method of IEC 61094-2

Microphones immersed in reference environmental conditions (23 °C, and 50 % RH) with static pressure adjusted from 94 kPa to 106 kPa in 1 kPa steps. Measurements at each pressure occur from 40 Hz to 20 kHz in one-third octave steps.

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Microphone Sensitivity Example—Taxon Tokens

Measure.Coefficient.Voltage.Pressure.AC.RMS.Differential.RMS.PressureField

- Measure: Microphones source their coefficients just as gage blocks source lengths and mass artifacts source mass. To calibrate a Source device we want a Measure CMC.
- Coefficient.Voltage.Pressure: We report a ratio of two different quantities (coefficient) and specify them as Numerator.Denominator.
- AC.RMS.Differential.RMS: Differentiates the measurand from, e.g., other pressure transducers that output DC voltage in response to absolute pressure. RMS (as opposed to peak-to-peak, peak, etc.) further defines the quantities.
- **PressureField**: Customers may want this result or a correction to FreeField or DiffuseField alternatives.

Microphone Sensitivity Example—CMC Parameters

Measure.Coefficient.Voltage.Pressure.AC.Differential.PressureField Parameters:

- \bullet Sensitivity: -26.5 dB re 1 V/Pa
- Acoustic Frequency: 25 Hz to 62 Hz
- Fluid: <u>Ambient Air</u>
- Static Pressure: 94 kPa to 106 kPa
- Reference Temperature: 20 °C, $23 \circ C$
- Reference Humidity: <u>50 %</u>
- Reference Pressure: 101.325 kPa

The measurement and its uncertainty involves other factors: cavity dimensions, microphones' acoustic impedance, coupler cavity volume, coupler thermodynamic properties, transmission-line parameters, voltage, current, microphone's temperature and pressure coefficients, etc. These however, assuming they do not involve the customer's choice of calibration requirements, do not take the form of CMC parameters.

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Microphone Sensitivity Example—Other Considerations

Measure.Coefficient.Voltage.Pressure.AC.Differential.PressureField

- We assumed reporting modulus only, not phase. A Complex token might apply.
- What about a Level token to differentiate the log quantity from a simple ratio? No, the M-Layer handles this as a scale conversion.
- Secondary calibration:
 - The taxonomy may remain the same, depending on the customer choices. (Might drop PressureField et al. if not applicable.)
 - Consider Source.Voltage.DC at different traceability levels—no taxon change.
 - Parameter options and uncertainty will change for every CMC, regardless of primary, secondary, etc. classification.

Radiometric Measurands

• Starting Taxonomy

- Diffuse reflectance factor: Ratio.RadiantFlux.Reflectance.Diffuse
- Regular reflectance factor: Ratio.RadiantFlux.Reflectance.Specular
- Transmittance factors: Ratio.RadiantFlux.Transmittance...
- Radiance factor: Ratio.Radiance.Bidirectional
- Gloss: Ratio.Radiance.Delta.Angle
- Parameters for which to specify ranges or values
 - Wavelength
 - Inicidence Angle, ViewAngle
 - Sample Size
 - Polarization

Further Examples

Other Taxons

Capacitance Conductance Conductivity Current AC Current AC Noise RMS Current AC Sinewave Current AC Sinewaye 2Phase Current AC Sinewave 3Phase Current AC Squarewaye Current.AC.Trianglewave Current DC Current DC Delta Current LoadEffect Current DC Delta Current SourceEffect Current.DC.OutputAndReadback Density Mass Gas Density. Mass. Liquid Density, Mass, Solid Energy.AC.Sinewave Energy, AC. Sinewave, Simulated Energy, AC, Sinewaye, Simulated, 2Phase Energy, AC, Sinewaye, Simulated, 3Phase Energy.DC Energy DC.Simulated Force Frequency Frequency, Amplitude Modulation, Rate Frequency, Frequency Modulation, Deviation Frequency, FrequencyModulation, Rate

Frequency.PhaseModulation.Rate Humidity.Absolute Impedance Inductance Length Length Circumference Length Diameter Length.Form.Flatness Length Form Parallelism Length Form Perpendicularity Length, Form, Roughness Length, Form, Roundness Length.Form.Sphericity Length.Form.Straightness.Axis Length.Form.Straightness.Surface Length Radius Mass Apparent Mass Conventional Mass True Phase PhaseModulation Phase ReflectionEactor RE Phase Transmission Factor PhaseNoise SideBand Power AC Sinewave Power AC Sinewaye Simulated Power AC Sinewaye Simulated 2Phase Power AC Sinewaye Simulated 3Phase Power DC

Power DC Simulated Power RF Sinewave Pressure Hydraulic Static Pressure Pneumatic Absolute Static Pressure Pneumatic Differential Static Pressure.Pneumatic.Gage.Static Ratio.AmplitudeModulation Ratio.AmplitudeModulation.Delta.Rate Ratio Density Mass Ratio Distortion Ratio.Distortion.AmplitudeModulation Ratio.Distortion.FrequencyModulation Ratio Distortion PhaseModulation Ratio.DutvCvcle Ratio.FrequencyModulation.Delta.Rate Ratio.Humidity.Relative Ratio, Humidity, Specific Ratio PhaseModulation Delta Rate Ratio Power Reflection Factor RE Ratio.Power.RF.Sinewaye.Delta.Frequency Ratio Power RE Sinewaye Delta Power Ratio Power RE Sinewaye Harmonic Ratio.Power.RF.Sinewaye.Spur Ratio Power TransmissionFactor Ratio PulseModulation CWtoPulsedPower Ratio PulseModulation OnOffPower Ratio, Torque Ratio, Voltage, AC, Ripple, OnDC

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Other Taxons

Ratio.Voltage.AC.Sinewave.Delta.Frequency Ratio.Voltage.AC.Sinewave.Delta.Voltage Resistance Resistance.Insulation Temperature Temperature.Radiometric Temperature.Simulated.PRT Temperature.Simulated.RTD Temperature.Simulated.Thermocouple Time.Interval Time.Period Time.PulseWidth Time.Transient Time.Transition PulsedRF Time.UTC Torque Torque.HydraulicPressure Voltage.AC.NoisePeakToPeak Voltage.AC.Ripple.OnDC Voltage.AC.Sinewave Voltage.AC.Sinewave.2Phase Voltage.AC.Sinewave.3Phase Voltage.AC.Squarewave Voltage.AC.Trianglewave Voltage.DC.Voltage.LoadEffect Voltage.DC.Delta.Voltage.LoadEffect Voltage.DC.OutputAndReadback Voltage.DC.OutputAndReadback Voltage.PeakToPeak

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Section 5

Conclusion

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Digitize your CMCs!

- Metrology's digital transformation has begun; coming our way soon!
- The MII initiative paves a way to digitize your CMCs.
- Oigital CMCs will draw new business and reduce costs.
- MII taxons fully qualify measurands for interoperable digital documents.
- We will reuse the taxonomy in digital instrument specifications and calibration certificates.
- We'd like to collaborate on your CMCs.
- SoA content and formatting remains under the laboratory's and AB's control.

Collaboration

- Going forward
 - GitHub for configuration management: collaboration, submissions, approvals
 - Taxonomy, CMC templates, specification and governance documents
 - https://github.com/NCSLI-MII
 - Ryan.White@nrc-cnrc.gc.ca, mjk@ieee.org
- Current information
 - Taxonomy, open-source taxonomy and SoA editors
 - https://github.com/CalLabSolutions/Metrology.NET_Public
 - Informal list at https://www.metrology.net/home/metrology-taxonomy/
 - Further info: http://miiknowledge.wikidot.com/

Acknowledgments

Please see the paper for further taxon-writing details. Further work, governance doc

Many thanks go to

- SIM MWG for the kind invitation
- NCSL International for its MII support
- NCSL International Committee members for their MII development work
- Cherine-Marie Kuster

And Thank You for your time!

Collaboration opportunities? Please bring your expertise!

Questions?

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