



Metrology and Instrumentation

Practical Applications for Engineering and Manufacturing

Samir Mekid

ASME
PRESS

WILEY

Metrology and Instrumentation

Wiley-ASME Press Series

Fabrication of Process Equipment
Owen Greulich, Maan H. Jawad

Engineering Practice with Oilfield and Drilling Applications
Donald W. Dareing

Flow-Induced Vibration Handbook for Nuclear and Process Equipment
Michel J. Pettigrew, Colette E. Taylor, Nigel J. Fisher

Vibrations of Linear Piezostructures
Andrew J. Kurdila, Pablo A. Tarazaga

Bearing Dynamic Coefficients in Rotordynamics: Computation Methods and Practical Applications
Lukasz Brenkacz

Advanced Multifunctional Lightweight Aerostructures: Design, Development, and Implementation
Kamran Behdinan, Rasool Moradi-Dastjerdi

Vibration Assisted Machining: Theory, Modelling and Applications
Li-Rong Zheng, Dr. Wanqun Chen, Dehong Huo

Two-Phase Heat Transfer
Mirza Mohammed Shah

Computer Vision for Structural Dynamics and Health Monitoring
Dongming Feng, Maria Q Feng

Theory of Solid-Propellant Nonsteady Combustion
Vasily B. Novozhilov, Boris V. Novozhilov

Introduction to Plastics Engineering
Vijay K. Stokes

Fundamentals of Heat Engines: Reciprocating and Gas Turbine Internal Combustion Engines
Jamil Ghojel

Offshore Compliant Platforms: Analysis, Design, and Experimental Studies
Srinivasan Chandrasekaran, R. Nagavinothini

Computer Aided Design and Manufacturing
Zhuming Bi, Xiaoqin Wang

Pumps and Compressors
Marc Borremans

Corrosion and Materials in Hydrocarbon Production: A Compendium of Operational and Engineering Aspects
Bijan Kermani and Don Harrop

Design and Analysis of Centrifugal Compressors
Rene Van den Braembussche

Case Studies in Fluid Mechanics with Sensitivities to Governing Variables
M. Kemal Atesmen

The Monte Carlo Ray-Trace Method in Radiation Heat Transfer and Applied Optics
J. Robert Mahan

Dynamics of Particles and Rigid Bodies: A Self-Learning Approach
Mohammed F. Daqaq

Primer on Engineering Standards, Expanded Textbook Edition
Maan H. Jawad and Owen R. Greulich

Engineering Optimization: Applications, Methods and Analysis
R. Russell Rhinehart

Compact Heat Exchangers: Analysis, Design and Optimization using FEM and CFD Approach
C. Ranganayakulu and Kankanhalli N. Seetharamu

Robust Adaptive Control for Fractional-Order Systems with Disturbance and Saturation
Mou Chen, Shuyi Shao, and Peng Shi

Robot Manipulator Redundancy Resolution
Yunong Zhang and Long Jin

Stress in ASME Pressure Vessels, Boilers, and Nuclear Components
Maan H. Jawad

Combined Cooling, Heating, and Power Systems: Modeling, Optimization, and Operation
Yang Shi, Mingxi Liu, and Fang Fang

Applications of Mathematical Heat Transfer and Fluid Flow Models in Engineering and Medicine
Abram S. Dorfman

Bioprocessing Piping and Equipment Design: A Companion Guide for the ASME BPE Standard
William M. (Bill) Huitt

Nonlinear Regression Modeling for Engineering Applications: Modeling, Model Validation, and Enabling Design of Experiments
R. Russell Rhinehart

Geothermal Heat Pump and Heat Engine Systems: Theory and Practice
Andrew D. Chiasson

Fundamentals of Mechanical Vibrations
Liang-Wu Cai

Introduction to Dynamics and Control in Mechanical Engineering Systems
Cho W.S. To

Metrology and Instrumentation

Practical Applications for Engineering and Manufacturing

Samir Mekid

King Fahd University of Petroleum & Minerals
Dhahran, Saudi Arabia



WILEY

This edition first published 2022

© 2022 John Wiley & Sons, Inc.

This Work is a co-publication between John Wiley & Sons, Inc. and ASME Press.

All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, except as permitted by law. Advice on how to obtain permission to reuse material from this title is available at <http://www.wiley.com/go/permissions>.

The right of Samir Mekid to be identified as the author of this work has been asserted in accordance with law.

Registered Office

John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, USA

Editorial Office

111 River Street, Hoboken, NJ 07030, USA

For details of our global editorial offices, customer services, and more information about Wiley products visit us at www.wiley.com.

Wiley also publishes its books in a variety of electronic formats and by print-on-demand. Some content that appears in standard print versions of this book may not be available in other formats.

Limit of Liability/Disclaimer of Warranty

The contents of this work are intended to further general scientific research, understanding, and discussion only and are not intended and should not be relied upon as recommending or promoting scientific method, diagnosis, or treatment by physicians for any particular patient. In view of ongoing research, equipment modifications, changes in governmental regulations, and the constant flow of information relating to the use of medicines, equipment, and devices, the reader is urged to review and evaluate the information provided in the package insert or instructions for each medicine, equipment, or device for, among other things, any changes in the instructions or indication of usage and for added warnings and precautions. While the publisher and authors have used their best efforts in preparing this work, they make no representations or warranties with respect to the accuracy or completeness of the contents of this work and specifically disclaim all warranties, including without limitation any implied warranties of merchantability or fitness for a particular purpose. No warranty may be created or extended by sales representatives, written sales materials or promotional statements for this work. The fact that an organization, website, or product is referred to in this work as a citation and/or potential source of further information does not mean that the publisher and authors endorse the information or services the organization, website, or product may provide or recommendations it may make. This work is sold with the understanding that the publisher is not engaged in rendering professional services. The advice and strategies contained herein may not be suitable for your situation. You should consult with a specialist where appropriate. Further, readers should be aware that websites listed in this work may have changed or disappeared between when this work was written and when it is read. Neither the publisher nor authors shall be liable for any loss of profit or any other commercial damages, including but not limited to special, incidental, consequential, or other damages.

Library of Congress Cataloging-in-Publication Data

Names: Mekid, Samir, author.

Title: Metrology and instrumentation : practical applications for engineering and manufacturing / Samir Mekid.

Description: Hoboken, NJ : Wiley, 2021. | Series: Wiley-ASME Press series | Includes index.

Identifiers: LCCN 2021034345 (print) | LCCN 2021034346 (ebook) | ISBN 9781119721734 (hardback) | ISBN 9781119721727 (adobe pdf) | ISBN 9781119721710 (epub)

Subjects: LCSH: Metrology. | Measuring instruments.

Classification: LCC QC88 .M38 2021 (print) | LCC QC88 (ebook) | DDC 620.0028/4—dc23

LC record available at <https://lcn.loc.gov/2021034345>

LC ebook record available at <https://lcn.loc.gov/2021034346>

Cover image: Courtesy of Abderrahman Mekid

Cover design: Wiley

Set in 9.5/12.5pt STIXTwoText by Straive, Chennai, India

Contents

Preface *xiii*

Acknowledgments *xv*

About the Author *xvii*

1 Fundamental Units and Constants in Metrology *1*

- 1.1 Introduction *1*
- 1.2 Current Definitions of the Main SI Units *6*
- 1.3 New Definition of Seven Base Units of the SI *6*
- 1.4 Derived International System (SI) Units *7*
- 1.5 SI Conversion *7*
- 1.6 Fundamental Constants *8*
- 1.7 Common Measurements *9*
- 1.8 Principles and Practices of Traceability *10*
 - 1.8.1 Definition of Traceability *10*
 - 1.8.2 Accreditation and Conformity Assessment *11*
- Multiple Choice Questions of this Chapter *12*
- References *12*

2 Scales of Metrology *13*

- 2.1 Introduction to Practical Metrology across All Scales *13*
- 2.2 Nanometrology *14*
 - 2.2.1 Introduction and Need in Industry *14*
 - 2.2.2 Definition of Nanometrology *15*
 - 2.2.3 Importance of Nanometrology in Science and Technology *15*
- 2.3 Standards *18*
- 2.4 Micrometrology *22*
 - 2.4.1 Introduction and Need in Industry *22*
 - 2.4.2 Definition of Micrometrology *22*
 - 2.4.3 Examples of Micrometrology of Microparts *22*
- 2.5 Macroscale Metrology *23*
 - 2.5.1 Standards *25*
- 2.6 Large-Scale Metrology and Large-Volume Metrology *29*
 - 2.6.1 Introduction and Need in Industry *29*
 - 2.6.2 Definition *30*
 - 2.6.3 Verification Standards *32*

2.7	Instruments Techniques	34
2.7.1	Large Coordinate Measuring Machines	35
2.7.2	Laser Trackers	35
2.7.3	Theodolite	35
	Multiple Choice Questions of this Chapter	37
	References	37

3 Applied Math and Statistics 39

3.1	Introduction	39
3.2	Scientific and Engineering Notation	39
3.3	Imperial/Metric Conversions	40
3.4	Ratio	41
3.5	Linear Interpolation	42
3.6	Number Bases	42
3.7	Significant Figures, Rounding, and Truncation	43
3.8	Geometry and Volumes	44
3.8.1	Perimeter	44
3.8.2	Volume and Area	44
3.9	Angular Conversions	44
3.10	Graphs and Plots	45
3.11	Statistical Analysis and Common Distributions	47
3.11.1	Definition of Measurement Data	47
3.11.2	Statistical Measurements	47
3.11.3	Statistical Analysis of Measurements	47
3.11.4	Probability	48
3.11.5	Sample and Population	49
3.11.6	Formulation of Mean and Variance for Direct Measurements	49
3.11.7	Mean and Variance Based on Samples	50
3.11.8	The Standard Deviation of the Mean	51
3.12	Formulation of the Standard Uncertainty and Average of Indirect Measurements	52
3.12.1	How to Determine the Measured Value and Random Error?	52
3.12.2	Repeated Measurements of One Single Quantity	52
3.12.3	Normal Distribution	53
3.12.4	Student's t -distribution	55
	Multiple Choice Questions of this Chapter	60

4 Errors and their Sources 61

	Introduction	61
4.1	Definition of the Error and Their Types	61
4.1.1	Systematic Errors	62
4.1.2	Random Errors	63
4.1.3	Components of Motion Error Assessment	63
4.2	Measurement Characteristics	63
4.2.1	Characterization of the Measurement	63
4.2.2	Resolution, Error Uncertainty, and Repeatability	64
4.2.3	Model of Measurement	67

4.3	Propagation of Errors	69
4.4	Sources of Errors	73
4.4.1	Static Errors and Dynamic Errors	73
4.5	Error Budget	77
4.5.1	Components of the Error Budget	77
4.5.2	Example of Error-Budget Table	78
4.6	Error Elimination Techniques	79
4.6.1	Methods	79
4.7	Model of Errors in CNC Using HTM	81
4.8	Case Study of Errors Budget	87
4.8.1	Description of the Designed System	87
4.8.2	Error Modeling and Experimental Testing	88
4.9	Solved Problems	96
	Multiple Choice Questions of this Chapter	97
	References	97
5	Measurement and Measurement Systems	99
5.1	Introduction	99
5.2	What Can Be Standard in a Measurement?	101
5.3	Definitions of Key Measurement Components	102
5.3.1	Measurement System	102
5.3.2	Measurement System Analysis	103
5.3.3	Measurement Process	103
5.4	Physical Measurement Process (PMP)	103
5.5	Difference between Number and an Analysis Model	104
5.6	Measurement Methods	105
5.6.1	Metrology and Measurement	105
5.6.2	Metrological Characteristics of Measuring Instruments	108
5.7	Instrumentation for Measurement	109
5.7.1	Background	109
5.7.2	Measurement Instrumentations	109
5.7.3	Digital Measuring Device Fundamentals	109
5.8	Non-Portable Dimensional Measuring Devices	110
5.8.1	Laser Interferometry, Application to CNC Machines	110
5.8.2	Coordinate Measuring Machine (CMM)	118
5.9	Metrology Laboratory Test for Students	140
	Multiple Choice Questions of this Chapter	146
	References	146
6	Tolerance Stack-Up Analysis	149
6.1	Introduction	149
6.1.1	Importance of Tolerance Stack-Up Analysis	149
6.1.2	Need for Tolerance Stack-Up Analysis in Assemblies	151
6.1.3	Manufacturing Considerations in Engineering Design	151
6.1.4	Technical Drawing	152
6.1.5	Definitions, Format, and Workflow of Tolerance Stack-Up	153

- 6.2 Brief Introduction to Geometric Dimensioning and Tolerancing (GD&T) 156
 - 6.2.1 Notation and Problem Formulation 156
 - 6.2.2 Dimension Types 157
 - 6.2.3 Coordinate Dimensioning 158
 - 6.2.4 Tolerance Types 160
 - 6.2.5 Characteristics of Features and Their Tolerances 162
- 6.3 Tolerance Format and Decimal Places 164
- 6.4 Converting Plus/Minus Dimensions and Tolerances into Equal-Bilaterally Toleranced Dimensions 165
- 6.5 Tolerance Stack Analysis 167
 - 6.5.1 Worst-Case Tolerance Analysis 169
 - 6.5.2 Rules for Assembly Shift 169
 - 6.5.3 Worst-Case Tolerance Stack-Up in Symmetric Dimensional Tolerance 171
 - 6.5.4 Worst-Case Tolerance Stack-Up in Asymmetric Dimensional Tolerance 173
- 6.6 Statistical Tolerance Analysis 173
 - 6.6.1 Definition of Statistical Tolerance Analysis 173
 - 6.6.2 Worst-Case Analysis vs RSS (Root-Sum Squared) Statistical Analysis 175
 - 6.6.3 Second-Order Tolerance Analysis 176
 - 6.6.4 Cases Discussions 176
 - 6.6.5 Understanding Material Condition Modifiers 178
- Appendix A from ISO and ASME Y14 Symbols 188
- Multiple Choice Questions of this Chapter 189
- References 189

- 7 Instrument Calibration Methods 191**
 - 7.1 Introduction 191
 - 7.2 Definition of Calibration 191
 - 7.3 Need for Calibration 192
 - 7.4 Characteristics of Calibration 193
 - 7.5 Calibration Overall Requirements and Procedures 195
 - 7.5.1 Calibration Methods/Procedures 195
 - 7.6 Calibration Laboratory Requirements 197
 - 7.7 Industry Practices and Regulations 198
 - 7.8 Calibration and Limitations of a Digital System 199
 - 7.9 Verification and Calibration of CNC Machine Tool 201
 - 7.10 Inspection of the Positioning Accuracy of CNC Machine Tools 202
 - 7.11 CNC Machine Error Assessment and Calibration 207
 - 7.12 Assessment of the Contouring in the CNC Machine Using a Kinematic Ballbar System 219
 - 7.13 Calibration of 3-axis CNC Machine Tool 221
 - 7.14 Calibration of a Coordinate Measuring Machine (CMM) 225
 - 7.14.1 CMM Performance Verification 225
 - 7.14.2 Accreditation of Calibration Laboratories 226
 - Section 1: Scope and Description 231
 - Section 2: Calibration Requirements 232
 - Section 3: Preliminary Operations 232
 - Section 4: Calibration Process 233

Section 5: Data Analysis	234
Section 6: Calibration Report	234
Multiple Choice Questions of this Chapter	235
References	235

8	Uncertainty in Measurements	237
8.1	Introduction and Background	237
8.2	Uncertainty of Measurement	238
8.3	Measurement Error	238
8.4	Why Is Uncertainty of Measurement Important?	239
8.5	Components and Sources of Uncertainty	239
8.5.1	What Causes Uncertainty?	239
8.5.2	Uncertainty Budget Components	240
8.5.3	The Errors Affecting Accuracy	240
8.6	Static Errors and Dynamic Errors	241
8.7	Types of Uncertainty	241
8.8	Uncertainty Evaluations and Analysis	242
8.9	Uncertainty Reporting	243
8.10	How to Report Uncertainty	245
8.11	Fractional Uncertainty Revisited	247
8.12	Propagation of Uncertainty	247
	Multiple Choice Questions of this Chapter	252
	References	252

9	Dimensional Measurements and Calibration	255
9.1	Length Measurement	255
9.2	Displacement Measurement	255
9.3	Manual Instruments	260
9.3.1	Caliper	260
9.3.2	Vernier Caliper	261
9.3.3	Micrometer	262
9.3.4	Feeler Gauge	262
9.3.5	Liner Measurement Tool	263
9.3.6	American Wire Gauge	263
9.3.7	Bore Gauge	263
9.3.8	Telescopic Feeler Gauge	264
9.3.9	Depth Gauge	265
9.3.10	Angle Plate or Tool	265
9.3.11	Flat Plate	266
9.3.12	Dial Gauge	266
9.3.13	Oil Gauging Tapes	267
9.3.14	Thread Measurement	267
9.3.15	Planimeter	267
9.4	Diameter and Roundness	269
9.4.1	How to Measure a Diameter?	269
9.4.2	Roundness	270
9.5	Angular Measurements	276

9.5.1	Line Standard Angular Measuring Devices	277
9.5.2	Face Standard Angular Measuring Devices	277
9.5.3	Measurement of Inclines	279
9.5.4	Optical Instruments for Angular Measurement	280
9.6	Metrology for Complex Geometric Features	282
9.6.1	Edge Detection Techniques Using a CCD Camera	282
9.6.2	Full Laser Scanning for Reverse Engineering	283
9.7	Measurement Surface Texture	285
9.7.1	Geometry of Surface	285
9.7.2	Surface Integrity	286
9.7.3	Specification of Surfaces	286
9.7.4	Sampling Length	287
9.7.5	Instruments and Measurement of Roughness	290
	Multiple Choice Questions of this Chapter	291
	References	291
10	Mechanical Measurements and Calibration	293
10.1	Importance of Mechanical Measurements	293
10.2	Mechanical Measurements and Calibration	293
10.3	Description of Mechanical Instruments	294
10.3.1	Mass Measurements	294
10.3.2	Force Measurements	295
10.3.3	Vibration Measurements	295
10.3.4	Volume and Density	296
10.3.5	Hydrometers	298
10.3.6	Acoustic Measurements	298
10.4	Calibration of Mechanical Instruments	300
10.4.1	When Is Equipment Calibration Needed?	300
10.4.2	When Is There No Need for Calibration?	301
10.4.3	Process of Equipment Calibration	301
10.5	Equipment Validation for Measurement	301
10.5.1	Is There a Need of Equipment Validation?	302
10.5.2	Features and Benefits of Validation	302
10.5.3	Process of Validation of Equipment	302
10.6	Difference between Calibration and Validation of Equipment	303
10.7	Difference between Calibration and Verification	303
10.8	Calibration of Each Instrument	304
10.8.1	Mass Calibration	304
10.8.2	Force Calibration	304
10.8.3	Pressure Calibration	304
10.8.4	Vibration Measurements	306
10.8.5	Volume and Density	307
10.8.6	Hydrometers	308
10.8.7	Acoustic Measurements	308
	Multiple Choice Questions of this Chapter	308
	References	308

11	Thermodynamic Measurements	309
11.1	Background	309
11.2	Scale of Temperature	309
11.2.1	Ideal Gas Law	310
11.2.2	Vacuum	310
11.2.3	Gas Constants	310
11.3	Power	312
11.4	Enthalpy	312
11.5	Humidity Measurements	312
11.6	Methods of Measuring Temperature	313
11.7	Temperature Measured through Thermal Expansion Materials	314
11.7.1	Liquid-in-Glass Thermometer	314
11.7.2	Bimetallic Thermometer	314
11.7.3	Electrical Resistance Thermometry	315
11.7.4	Resistance Temperature Detectors	316
11.7.5	Examples for Discussion	318
11.7.6	Thermistors	320
11.8	Thermoelectric Temperature Measurement or Thermocouples	321
11.8.1	Basic Thermocouples	321
11.8.2	Fundamental Thermocouple Laws	322
11.9	Thermocouple Materials	323
11.9.1	Advantages and Disadvantages of Thermocouple Materials	324
11.9.2	Thermocouple Voltage Measurement	325
11.10	Multi-Junction Thermocouple Circuits	326
11.11	Thermopiles	327
11.12	Radiative Temperature Measurement	327
	Multiple Choice Questions of this Chapter	329
	References	329
12	Quality Systems and Standards	331
12.1	Introduction to Quality Management	331
12.2	Quality Management	332
12.2.1	Total Quality Management (TQM)	332
12.2.2	Quality Management System (QMS)	333
12.2.3	TQM Is Essential to Complete TQS	333
12.2.4	ISO-Based QMS Certification	333
12.3	Components of Quality Management	334
12.3.1	Quality System (QS)	334
12.3.2	Quality Assurance (QA)	335
12.3.3	Quality Control (QC)	335
12.3.4	Quality Assessment	335
12.4	System Components	336
12.4.1	Quality Audits	336
12.4.2	Preventive and Corrective Action	336
12.4.3	Occupational Safety Requirements	337
12.4.4	Housekeeping Practices	338

12.5 Quality Standards and Guides 338
 Multiple Choice Questions of this Chapter 339
 References 340

13 Digital Metrology Setups and Industry Revolution I4.0 341

13.1 Introduction 341
13.1.1 What Is a Digital Measurement? 341
13.1.2 Metrology and Digitalization 341
13.1.3 Implementation Strategy 343
13.2 Data Acquisition 343
13.3 Setup Fundamentals for Measurement and Data Acquisition 344
13.3.1 Length Measurement in Open Loop 344
13.3.2 Thermal Measurement and Data-Acquisition Considerations 345
13.3.3 Data Transfer to Cloud 349
13.3.4 Internet of Things (IoT) Metrology 349
13.3.5 Closed-Loop Data Analysis- (In-Process Inspection) 350
13.4 Digital Twin Metrology Inspection 352
 Multiple Choice Questions of this Chapter 354
 References 354

Index 357

Preface

This book is conceived for engineers and technicians operating in various industrial fields. It is also for students of mechanical, production, and other related disciplines in engineering to facilitate understanding of fundamentals of measurements, instruments and governing rules followed by learning various shop-floor required measurement techniques.

The book introduces basic needs from math, statistics, and measurement principles. It discusses errors and their sources in manufacturing while describing the various measurement instruments. Simple physical parameters such as force, torque, strain, temperature, and pressure are explained. The subsequent chapters cover tolerance stack-ups, GD&T, calibration principles in various aspects of manufacturing, and quality standards. ASME and ISO are cited according to needs and to corresponding knowledge throughout the book. Each chapter ends with a set of MCQs with answer tables to help prepare technicians and engineers for various qualification diplomas and certificates. The book adopts an illustrative approach to explain the concepts with solved examples to support understanding.

Chapter 1 of the book introduces the fundamental units and constants needed in metrology supported by the international vocabulary of metrology and international standards.

Chapter 2 emphasizes metrology that covers all scales, starting from nanoscale to large scale. Differences and relationships between scales are introduced to understand the differences and possible complementarity, while Chapter 3 introduces basic math and science background mainly to refresh memories and be a reference in case there is a need to check information. Math and science are of great importance when dealing with measurement since the inception of humanity.

Chapter 4 defines the error and its various possible sources: how error propagates in measurement, errors associated with motion, error classification, and error elimination. An estimation of error, or uncertainty analysis, is a tool for determining the performance capability of machine tools and highlighting potential areas for performance and cost improvement.

In Chapter 5, the measurement and quantification are the fundamental concepts of metrology, including the measurement system characteristics. This considers explicit and internationally accepted definitions, principles, and standards. The purpose of any measurement system is to provide the user with a numerical value corresponding to the variable being measured by the system. What are the international related standards? Examples of length measurement, parts, and machine inspection with reverse engineering are provided.

One of the most significant chapters is Chapter 6 as it introduces the tolerance stacks analysis methods. This chapter establishes uniform practices for stating and interpreting dimensioning, tolerancing, and related requirements for use on engineering drawings and in related documents under ASME Y14.5.1. A brief introduction to geometric dimension and tolerancing is followed by

tolerance stacks. This is to assign the right tolerances and to make sure that no unnecessary tight tolerance is selected, leading to costly manufacturing.

Chapter 7 introduces the principles and fundamentals of calibration under the international standards definitions and agreements. It tackles real calibration of machines and instruments in detail for understanding of the process.

Chapter 8 discusses the uncertainty based on the international standards and recent developments followed by the propagation of error with real-world examples. The doubt surrounding this measurement is the uncertainty of measurement. The background and fundamental definition of uncertainty and error will be discussed later based on international standards with all aspects in general practice.

Mechanical measurement for length and others are discussed in two chapters.

Chapter 9 covers some of the instruments used for displacement and length measurements. From length measurement and calibration of instruments such as micrometers, calipers, gages, or tape measures, to high-tech optics-based scales and comparators. The industrial leading dimensional instrument calibration capabilities are available and well designed to reduce risk and inaccuracy in measurements. Chapter 10 covers mechanical instruments measuring other than length measurands. The chapter discusses calibration-related techniques. These are fundamental basis instruments that may be needed by any engineer at any time.

Thermodynamic properties of any material or solution are treated in Chapter 11. They are valuable not only for estimating the usefulness of the material or the feasibility of reactions in solution, but they also provide one of the best methods for investigating theoretical aspects related to the material or solution structure. Thermal properties of materials can be measured directly or indirectly. This includes temperature, developed pressure, calorimetry, and thermal conductivity.

Chapter 12 covers quality management and metrology since they are important components in metrology labs and manufacturing enterprises. This chapter introduces the definition of most components of quality with the related international standards with an overall organization of the lab requirement.

Contemporary digital metrology is discussed in Chapter 13. Digital metrology and its relationship to manufacturing and I4.0 are introduced. This chapter covers the digitalization, automation, and measurements that are becoming extremely important in this era of digital manufacturing and digital twins metrology (DTM). The measurement system is a combination of real-time control system and system for data transmission. Digital computing is the tool for data processing. The technology readiness for most measurement instrumentation exists together with virtual instruments capable of building further the DTM. Since several apps for smart phones have been developed, the last appendix gives a short presentation of 38 apps.

About the Website Materials

This book has an online appendices extension covering smart phone Apps related to various metrology aspects discussed in the book and found in Appendix A, and a technical terms glossary in Appendix B. The link is www.wiley.com/go/mekid/metrologyandinstrumentation.

Acknowledgments

This book is like a vessel of time and knowledge since much of it has been dedicated to compiling information and data, verifying and checking numerous experiments, and ensuring that knowledge is delivered in a simple manner that can be easily captured by readers.

Several specialist companies in the area of metrology and manufacturing have contributed directly or indirectly to this book; hence, I am very thankful to all of them.

I acknowledge the courtesy of Fotofab (Chicago, USA), Leica (UK), and Renishaw (UK) to use some of their materials.

I am thankful to Otila Prian and Nina Fernandez from CREAFORM (AMETEK) for their reverse engineering samples; Ross Snyder, Application Engineer from Sigmetrix (Michigan, USA) for his stack-up analysis contribution. I would also like to thank Mr. Nicolaus Spinner from SPINNER Werkzeugmaschinenfabrik GmbH in Sauerlach (Germany) for providing me with the calibration results of his machines.

My thanks are extended to my Managing Editors: Gabriella Robles and Sarah Lemoire from John Wiley & Sons, Inc.

I would also like to acknowledge my MSc student Usman Khan and our departmental secretary Mino Thankachan for the hard work of formatting the chapters. Not to forget Abderrahman Mekid and Khawla Mekid for their editing and revisions.

The author would like to acknowledge the support of King Fahd University of Petroleum and Minerals (KFUPM) through the Deanship of Research Oversight and Coordination (DROC) for their support in research and resources made available to this book under BW#191006.

October 1, 2021

Professor Samir Mekid

About the Author

Samir Mekid is professor of mechanical engineering at KFUPM and chartered engineer registered with IMechE (UK) and ASME member. Prior to joining KFUPM, he was assistant professor at UMIST (UK) and The University of Manchester (UK). He has worked with Caterpillar in the design department and has been an expert EU evaluator for various countries to several European Framework Projects Programs, e.g., FP6, FP7. He was member of the Scientific Advisory Board of the Centre of Excellence in Metrology for Micro and Nanotechnology (CEMMNT) in the UK. His area of research includes machine design, manufacturing instrumentation, metrology, mechatronics, smart materials, and sensors design. He has published over 180 publications in professional journals and international conference proceedings and edited three books. He holds more than 30 patents.

During his ongoing career, he taught several courses for undergraduate and graduate students including: metrology, sensors and actuators, together with machine design. He has trained approximately one hundred engineers through short courses on tolerance stack-ups, GD&T, manufacturing systems, and materials selection. He is currently the Founding Director of the Interdisciplinary Research Center for Intelligent Manufacturing and Robotics at KFUPM.

1

Fundamental Units and Constants in Metrology

“When you can measure what you are speaking about and express it in numbers, you know something about it.”

—Lord Kelvin (1883). Source: Public Domain.

1.1 Introduction

Metrology is the science of measurement with various applications. It is derived from the Greek words *metro* – measurement and *Logy* – science. The BIMP (Bureau of Weights and Measures in France) defines metrology as “the science of measurement embracing both experimental and theoretical determinations at any level of uncertainty in any field of science and technology.”

Five pivots define the functions of metrology:

- 1) To establish the units of measurements;
- 2) To replicate these units as standards;
- 3) To guarantee the measurement uniformity;
- 4) To develop measurement methods;
- 5) To investigate the accuracy of methods-related errors.

Based on this, the objectives of metrology are:

- 1) Selection of proper measuring instrument;
- 2) Proper measuring standards;
- 3) Minimizing inspection cost;
- 4) Defining process capabilities;
- 5) Standardization;
- 6) Maintaining accuracy and precision during inspection or as component of an instrument over time of use [1].

Therefore, two types of metrology exist:

- 1) Deterministic, or industrial, metrology.
- 2) Legal, or scientific, metrology.

Measurement is the process of revealing a single or multiple values to the characteristics of an object or property by conducting experiments to determine the value of this particular property. These properties may be physical, mechanical, or chemical, such as length, weight, force, strain, volume, angle, and mols.

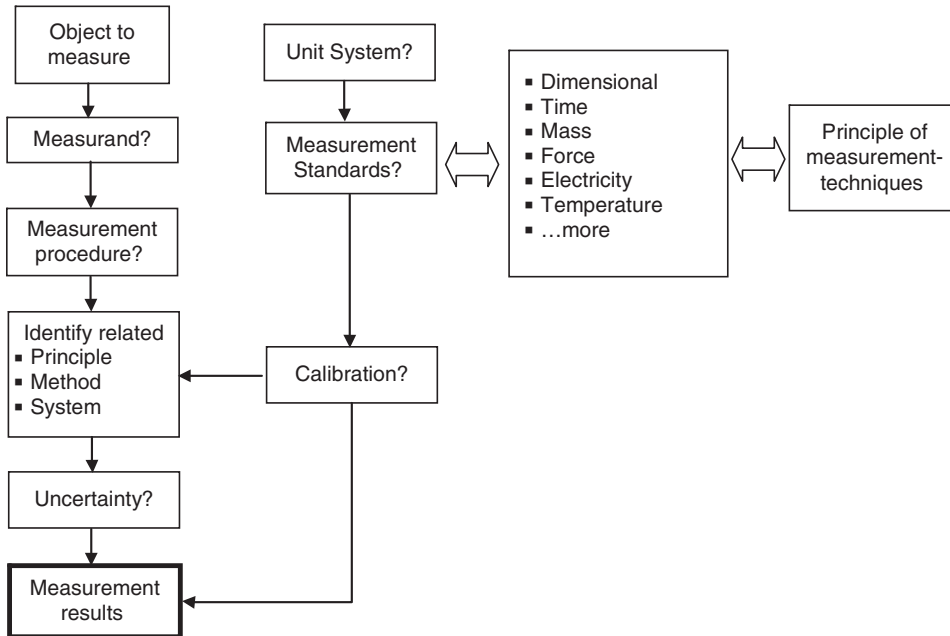


Figure 1.1 Simplified methodology producing measurement results.

Metrology also includes precision, repeatability, and accuracy, which refers to how accurate the measured value is. It establishes a well-known understanding of the measuring process and the related units that are critical in connecting various human activities and ensures that these measurements are linked to reference standards, which is commonly referred to as traceability. For as long as civilization has existed, measurements have been taken. It is necessary for a country's economic and social development. It provides precise measurements that have an impact on the economy, health, safety, and general well-being. It could also be a legal problem. As a result, the topic is always in demand.

This chapter will introduce the fundamental units and constants in metrology through conversions between units and systems. To put measurements into context, a complete methodology of the act of measurement beginning with the object to measure and ending with the result that constitutes the information needed for the object is required. The complete process is summarized in Figure 1.1. The figure depicts a simplified methodology for producing measurement results with minimal conditions such as the units to be known, the calibration of the measurement instruments, and the uncertainty of such measurements. This is to cast the majority of the aspects that engineers conducting measurements must be aware of. A dimension is a non-numerical measure of a physical variable. The unit is used to associate a quantity or measurement with a dimension.

Example 1.1 The mass of an object is a primary dimension, while 15 kg is associated with the quantity 15 of mass with the unit of kg. We need a comparison with some precise unit value to measure the quantity of anything. Body parts (Figure 1.2) and natural surroundings were used by early humans to provide suitable measuring instruments. Elementary measures became essential in the primitive human societies for tasks such as building dwellings, making clothing, bartering for food, and exchanging raw materials.

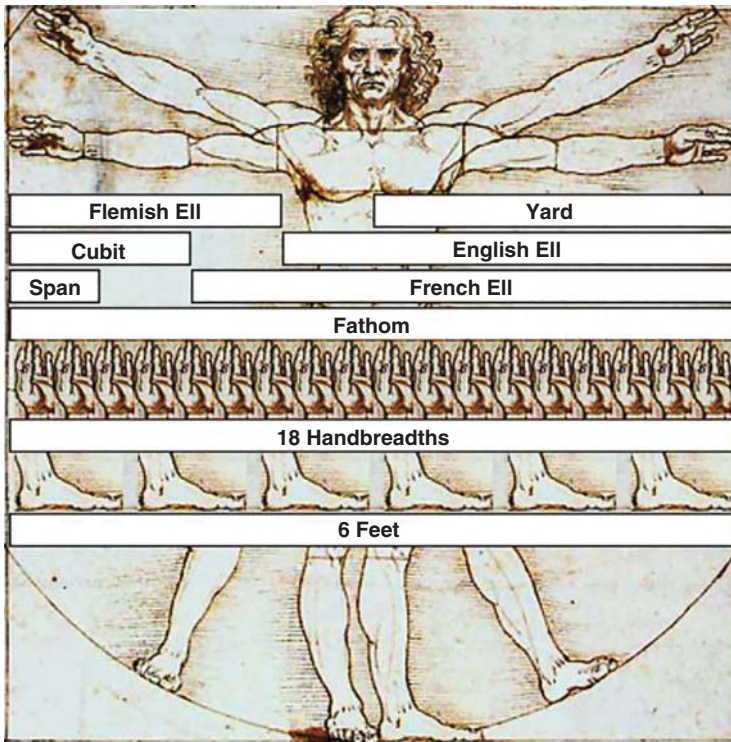


Figure 1.2 Vitruvian man by Leonardo da Vinci showing nine historical units of measurement.
Source: Wikimedia Commons

- According to early Babylonian and Egyptian transcripts, length was first measured with the forearm (cubit), hand (palm and span), and finger (digit).
- The cycles of the celestial bodies such as the sun, moon, and others were used for time measurements.
- Plant seeds were used for the sake of establishing volume measurement, while with the expansion of scales for weighing, seeds and stones became standards. As sample, the carob seed was the base measure for the carat, which is still used as a mass unit in the gemstone industry.

As trade and commerce expanded, it became necessary to standardize measurement systems across many countries. This decreased the possibility of disagreements arising from measurement system misunderstandings.

The international system of units, known as the SI (from French “Système International”) unit system, distinguishes physical units into two classes as shown below:

- 1) Base or primary units; and
- 2) Derived units.

These two categories cover the most commonly used units, such as time, temperature, length, mass, pressure, and flow rate. The National Institute of Standards and Technology (NIST) [2] introduced the SI units, which can be found at this hyperlink: **SI units** (<https://physics.nist.gov/cuu/Units/>). For more information on the SI units, visit the website of the international standards organization known as the Bureau International des Poids et Mesures (BIPM).

Table 1.1 Primary units.

Measurement	Units	Symbol	Description
Unit of length	meter	m	One meter is equal to the length of the path travelled by light in vacuum during a time interval of $1/299792458$ of a second.
Unit of mass	kilogram	kg	One kilogram is equal to the unit of mass presented by the international prototype of the kilogram in Figure 1.2. Since 2019, the new definition based on Planck's constant has been used.
Unit of time	second	s	One second is equal to the duration of 9192631770 periods of the radiation corresponding to the transition between the two hyperfine levels of the ground state of the cesium-133 atom.
Unit of electric current	ampere	A	One ampere is defined as follows: the constant current if maintained in two straight parallel conductors of infinite length, of negligible circular cross-section, and placed 1 meter apart in vacuum, will produce between these conductors a force equal to 2×10^{-7} newton per meter of length.
Unit of thermodynamic temperature	kelvin	K	One kelvin is the fraction $1/273.16$ of the thermodynamic temperature of the triple point of water.
Unit of amount of substance	mole	mol	One mole is the amount of substance of a system containing as many elementary entities as there are atoms in 0.012 kilogram of carbon-12. When the mole is used, the elementary entities must be specified and may be atoms, molecules, ions, electrons, other particles, or specified groups of such particles.
Unit of luminous intensity	candela	cd	One candela is the luminous intensity within one direction, of a source that emits monochromatic radiation of frequency 540×10^{12} hertz and having a radiant intensity of $1/683$ watt per steradian in that direction.

As will be demonstrated later, each measurement unit has a primary quantity that is used by convention. Each primary quantity has only one primary unit. As a result, every primary unit can be decomposed or recomposed further. Table 1.1 shows primary units of different kinds of physical quantities, symbols, and their descriptions. Figure 1.3 depicts the kilogram prototype safely conserved in Paris as a reference unit of kg kept constant in quantity for comparison. The following section discusses derived units, which are shown in Table 1.2.

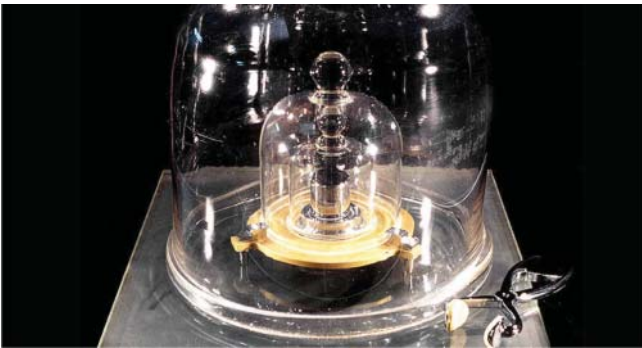
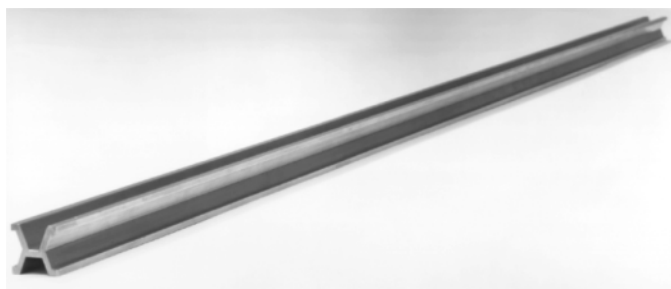


Figure 1.3 The standard kilogram for mass.

Table 1.2 Derived units.

Derived quantity	Si derived new unit	Symbol	SI units	SI base units
Force	newton	N		mkg s^{-2}
Pressure, stress	pascal	Pa	N/m^2	$\text{m}^{-1}\text{kg s}^{-2}$
Energy, work, quantity of heat	joule	J	Nm	$\text{m}^2\text{kg s}^{-2}$
Power	watt	W	J/s	$\text{m}^2\text{kg s}^{-2}$
Electric charge	coulomb	C		sA
Electromotive force	volt	V		$\text{m}^2\text{kg s}^{-3}\text{A}^{-1}$
Electric capacitance	farad	F	C/V	$\text{m}^{-2}\text{kg}^{-1}\text{s}^4\text{A}^2$
Electric resistance	ohm	Ω	V/A	$\text{m}^2\text{kg s}^{-3}\text{A}^{-2}$
Electric conductance	siemens	S	A/V	$\text{m}^{-2}\text{kg}^{-1}\text{s}^3\text{A}^2$
Velocity	meter per second		m/s	
Angular velocity	radian per second		1/s	
Mass flow rate	kilogram per second		kg/s	
Flow rate	liter per second		l/s	

**Figure 1.4** The platinum-iridium meter bar reference. *Source:* Wikimedia Commons

The International Prototype Meter bar, shown in Figure 1.4, is made of 90% platinum and 10% iridium alloy and served as the SI (metric system) standard of length from 1889 until 1960, when the SI system switched to a new definition of length based on the wavelength of light emitted by krypton-86. The practical length of the meter was defined by the distance between two fine lines ruled on the central rib of the bar near the ends measured at the freezing temperature of water.

The bar was given an X (Tresca) cross-sectional shape to increase its stiffness-to-weight ratio and improve its thermal accommodation time so the graduation lines could be located on the “neutral” axis of the bar where the change in length with flexure is minimum. The prototype was made in 1889, its length made equal to the previous French standard “Meter of the Archives.” At the same time, twenty-nine identical copies were made, which were calibrated against the prototype and distributed to nations to serve as national standards and possibly for comparison after a few years.

1.2 Current Definitions of the Main SI Units

The current definition of the base and primary units are shown in Table 1.1.

1.3 New Definition of Seven Base Units of the SI

Seven base units of the SI are known to be the second, meter, kilogram, ampere, kelvin, mole, and candela. Some have been based on physical constants for a long time. Since 1983, the meter has been defined as the length of the path traveled by light in vacuum over a time interval of $1/299\,792\,458$ s. However, the four that metrologists have agreed to redefine recently were previously based on something—i.e., an object, experiment, or phenomenon—implying that their value is not universal.

As a result of this decision [3], all seven SI units are currently defined in terms of physical constants.

The meter, symbol m, is the SI unit of length. It is defined by taking the fixed numerical value of the speed of light in vacuum, c , to be $299\,792\,458$ when expressed in the unit $\text{m}\cdot\text{s}^{-1}$, where the second is defined in terms of the cesium frequency $\Delta\nu_{\text{Cs}}$. The meter may be expressed directly in terms of the defining constants (Eq.(1.1)):

$$1\text{ m} = \frac{9\,192\,631\,770}{299\,792\,458} \frac{c}{\Delta\nu_{\text{Cs}}} \quad (1.1)$$

Previously, one meter was defined as the length traveled by light in 3.335641×10^{-9} s (based on the speed of light in a vacuum). It was also defined as $1,650,763.73$ wavelengths in vacuum of the orange red line of the spectrum of krypton-86.

Most affected is the kilogram, which is currently fixed by a 143-year-old platinum alloy cylinder known as the “Le Grand K” and kept at the International Bureau of Weights and Measures (BIPM) in Paris. The kilogram is now defined by Planck’s constant, h , recently measured with extraordinary precision. Its agreed value is set at $6.626\,070\,15 \times 10^{-34} \text{ kg m}^2 \text{ s}^{-1}$ when expressed in the unit J s, which is equal to $\text{kg m}^2 \text{ s}^{-1}$, the meter and second being defined in terms of c and $\Delta\nu$. This means that the kilogram is defined in terms of Planck’s constant instead of the mass of a cylinder of metal called International Prototype Kilogram.

Meanwhile, the ampere is determined by the elementary electric charge, e , which is given as $1.602\,176\,634 \times 10^{-19}$ when expressed in coulombs. The kelvin is determined by the fixed numerical value of Boltzmann’s constant, k , which is $1.380\,649 \times 10^{-23}$ when expressed in units of J K^{-1} , and the mole is determined by Avogadro’s constant (N_{A}), which contains exactly $6.02\,214\,076 \times 10^{23}$

atoms or molecules. This number is the fixed numerical value of the Avogadro constant, N_A , when expressed in units of mol^{-1} .

1.4 Derived International System (SI) Units

A derived SI unit is a measurement unit that is devised for a derived quantity different from primary units shown previously. Derived units combine different base units as described in Table 1.2. These derived units are obtained by simple mathematical transformations.

The Imperial unit system now includes the customary units of the United States in North America. The British Weights and Measures Act of 1824 established the Imperial unit system. Following that, the system was made official throughout the United Kingdom. It should be noted that some units are used in the United States but not in the United Kingdom, and vice versa. The differences are found in the following:

- i) British fluid ounce = 0.961 US fluid ounce;
- ii) US fluid ounce = 1.041 British fluid ounces;
- iii) British Imperial gallon = 1.201 US gallons;
- iv) US gallon = 0.833 British Imperial gallon.

1.5 SI Conversion

Converting SI units is very common when considering the SI unit and its related prefix described in Table 1.3.

This system comprises 7 base quantities (common) and 16 prefixes that designate the amount. The base unit and prefixes can be combined to produce the desired result.

Example 1.2 A car's weight can be written as 2000 kg, but it is better expressed in tons. It is no longer appropriate to write the results in grams. The possibilities for combining are limitless. It is

Table 1.3 SI Units and prefixes.

Prefix	Abbreviation	Meaning	Example
tera	T	10^{12}	1 terameter (Tm) = 10^{12} m
giga	G	10^9	1 gigameter (Gm) = 10^9 m
mega	M	10^6	1 megameter (Mm) = 10^6 m
kilo	k	10^3	1 kilometer (km) = 10^3 m
deci	d	10^{-1}	1 decimeter (dm) = 10^{-1} m
centi	c	10^{-2}	1 centimeter (cm) = 10^{-2} m
milli	m	10^{-3}	1 millimeter (mm) = 10^{-3} m
micro	μ	10^{-6}	1 micrometer (μm) = 10^{-6} m
nano	n	10^{-9}	1 nanometer (nm) = 10^{-9} m
angstrom	\AA	10^{-10}	1 angstrom (\AA) = 10^{-10} m
pico	p	10^{-12}	1 picometer (pm) = 10^{-12} m
femto	f	10^{-15}	1 femtometer (fm) = 10^{-15} m

critical to present the measurement results in a clear and easy-to-understand figure. Based on the previous table:

1 g = 0.001 kg, which can be better presented as $1 \text{ g} = 10^{-3} \text{ kg}$;

1 nm = 0,000000001 m, which can be better written as $1 \text{ nm} = 10^{-9} \text{ m}$.

Or 1 000 000 mm = 1 km.

When converting using SI units, the prefix is very important if the user knows the ranking right away.

Example 1.3

567 m = 0.567 km (dividing by 1000 since 1 km = 1000 m)

30 s = 0.5 min (since 1 min = 60 s).

1.6 Fundamental Constants

As a general definition, a fundamental constant refers to a dimensionless physical constant. They are usually assumed to be universal and have constant quantitative values. The numbers are constant and do not involve any physical measurement.

a) The gravitation constant

This is an empirical constant involving gravitational effects and used in Newton's law of universal gravitation, which states that all objects attract each other with a force that is proportional to the product of their masses (m_1 and m_2) and inversely proportional to the square of their distance, as shown in Eq.(1.2).

$$F_1 = F_2 = G (m_1 \times m_2)/r^2. \quad (1.2)$$

Where $G = 6.67430(15) \times 10^{-11}$ with the unit $\text{m}^3 \text{ kg}^{-1} \text{ s}^{-2}$ in SI units.

b) The speed of light

The speed of light is a constant, denoted by c , and is equal to 299 792 458 m/s (approximately 300,000 km/s, or 186,000 mi/s) in **vacuum**. It is defined as a universal **physical constant** that is important in many areas of **physics**. This constant is exact since the international agreement on the **meter** was defined as the length of the path traveled by light in the vacuum during a time interval of 1/299 792 458 s. This constant also features in Einstein's equation of mass-energy equivalence, $E = mc^2$.

c) Planck's constant

Planck's constant, h , can be found in problems classified as quantum physics. It is a **physical constant** representing the **quantum** of electromagnetic action, relating the energy carried by a **photon** to its frequency. The product of Planck's constant by the frequency of a photon gives its energy.

In quantum mechanics, Planck's constant is of fundamental importance. It serves to define the kilogram in metrology. The value of Planck's constant is exact, with no uncertainty and is given as $h = 6.626\,070 \times 10^{-34} \text{ J s}$ (or J Hz^{-1}). Planck's constant may be used in the SI unit of frequency, and hence the so-called reduced Planck's constant is used instead, defined as $\hbar = h/2\pi$ (\hbar is pronounced "h-bar").

The Planck length, denoted ℓ_p , is a unit of **length** describing the distance traveled by light in one unit of **Planck time** in a perfect vacuum. The Planck length ℓ_p is defined as $\ell_p = \text{sqrt}$

$(\hbar G/c^3)$. This has been considered as the approximate equivalent value of this unit with respect to the meter:

$$\ell_p = 1.616229(38) \times 10^{-35} \text{ m}, \quad (1.3)$$

where c is the **speed of light** in a vacuum, G is the **gravitational constant**, \hbar is the **reduced Planck's constant**, and the two digits enclosed by parentheses are the standard uncertainty. This length is about 10^{-20} times the diameter of a proton.

The Planck mass, denoted by m_p , is the unit of **mass** in the system of **natural units** of **Planck units**. It is roughly equivalent to 0.021 milligrams (mg). For example, it is roughly the size of a flea egg. It is of the order of 10^{15} (a quadrillion) times larger than the highest energy available to contemporary **particle accelerators**. It is defined as: $m_p = \sqrt{\hbar c/G}$, where c is the **speed of light** in a vacuum, G is the **gravitational constant**, and \hbar is the **reduced Planck's constant**.

$$1 m_p = 2.176435(24) \times 10^{-8} \text{ kg}. \quad (1.4)$$

The Planck time (t_p) is the **unit of time** in the system of **Planck units** in **quantum mechanics** as expressed in Equation 1.4. A Planck time unit is the **time** needed for **light** to travel a distance of one **Planck length** in a **vacuum**. This time is approximated as 5.39×10^{-44} s.

$$t_p = \sqrt{\hbar G/c^5}, \quad (1.5)$$

Where $\hbar = h/2\pi$ is the **reduced Planck's constant** (sometimes h is used instead of \hbar in the definition), G = **gravitational constant**, and c = **speed of light in vacuum**.

Many other fundamental constants are discussed in their related areas toward the end of this book.

d) *The standard acceleration for gravity*

The standard acceleration for gravity, known as g , varies depending on location and is equal to 9.809 m s^{-2} in USA.

e) *Avogadro's number*

Avogadro's number refers to the number of units in one mole of any substance, which is also known as the molecular weight in grams. It is defined as $L = 6.02214199 \times 10^{23}$. The unit of this depends on the nature of the substance. It can be electrons, atoms, or molecules.

1.7 Common Measurements

The International System of units (SI) is used as a comparison framework for the most commonly used measurements in inspection and testing. It establishes seven fundamental units:

- i) Meter [m] - length;
- ii) Second [s] - time;
- iii) Kilogram [kg] - mass;
- iv) Ampere [A] - current;
- v) Candela [cd] - light;
- vi) Kelvin [K] - temperature;
- vii) Mole [mole] - amount of substance.

Measurements are carried out in laboratories, outdoor and in situ in plants. Proper equipment is used to measure with a condition that has been previously calibrated.

Indirect measurements can be carried out using equations, with the outcomes being the results of the execution of these equations.

Example 1.4

- voltage [V] = resistance [ohm] \times current [A]; hence, current = voltage/resistance.
- area [m²] = length [m] \times length [m]
- pressure [Pa] = force [N] / area [m²].

Accuracy in measurements is required in many fields, and because all measurements are close approximations, great care must be taken when taking measurements.

Example 1.5 When calibrating, you must generate a known amount of the variable to be measured as well as the SI unit under test.

1.8 Principles and Practices of Traceability

The objective as introduced in this book is to learn and understand measurements and their related calibration and standards, as well as principles and practice of traceability. This is a short introduction.

1.8.1 Definition of Traceability

It is defined as the ability to link the results of the calibration and measurements to the related standard and/or reference through an unbroken chain of comparisons.

The international vocabulary of metrology (VIM) defines traceability as the property of the result of a measurement or the value of a standard that can be related to stated references, usually national or international standards, by an unbroken chain of comparisons, all with stated uncertainties [4]. The unbroken chain of comparisons is called the “traceability chain.”

The latter is composed of a number of instruments linked together to supply measurement. The competence and uncertainty are essential elements in the traceability according to ISO 17025 section 5.6.

Because there is always a difference in measurement between the output of the instrument and the true value of the measurand, measurement uncertainty is used to evaluate a quantitative statistical estimate of the limits of that difference. This will be discussed in chapters 3 and 4. VIM defines the measurement uncertainty as a parameter associated with the results of a measurement that characterizes the dispersion of the values that could reasonably be attributed to the measurand.

The calibration is typically performed by measuring a test unit against a known standard or reference. National measurement institutes across countries are typically a source of official approvals and verification for the work performed of various types of measurements, such as NIST (USA), NPL (UK), and BNM (France). The traceability has three essential components described as follows:

- Traceable calibration requiring comparisons with traceable standards or reference materials;
- Traceable calibrations can be performed only by competent laboratories with accreditation to ISO 17025;
- A traceable calibration certificate must contain an estimate of the uncertainty associated with the calibration.