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### Systems Engineering Integrative Project "A Systems Engineering Approach to Complex Tool Realization"

Jude Zils December 4, 2009



### Abstract

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Tooling exists to assist in the accurate and precise 0 performance of work on engineering products. The engineering product therefore defines and constrains the form and function of the associated tooling. The process of defining, fabricating, and verifying tooling is often subject to individual, business, or government perspectives and processes. The Systems Engineering process will be beneficial when adapted and applied to the process of defining, fabricating, and verifying tooling. The methodical processes and tools associated with Systems Engineering will embed the tooling process in the product requirement and design process and encourage increased interaction and concurrent engineering practices. A tooling process, based on System Engineering principles combined with best industry practices, that is ingrained in the product life cycle and which thoroughly documents associated technical and producibility requirements will reduce issues currently prevalent in complex tooling realization.

### **Problem Statement**

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Current tooling processes in industry are applied late in the product life cycle, loosely organized, insufficiently documented, and lack appropriate traceability for reference and future use or modification. This results in a loss of value to individual project stakeholders such as the customer, project management, the IPT, and the tooling fabrication team. The loss of project stakeholder value manifests itself in schedule delays, cost overruns, redesign, rework, underutilized tooling, excessive tooling, damaged product, and a lack of tooling producibility. The solution is a clearly defined tooling process based on established system engineering tools, project management tools, and best industry practices which encompasses the product life cycle from inception to verification. The tooling process must take into account the complexity, intended use, and size of the tooling as to not exceed the appropriate cost to benefit trade. The tooling process should be incorporated early in the project increasing the up front investment in documentation and engineering while reducing risk and avoiding future costs.



The author of this project paper is a Manufacturing Engineer at a . major Aerospace company and a graduate student in Systems Engineering at Loyola Marymount University, L.A. This project paper is formulated as an application of Systems Engineering knowledge learned by the author in the graduate program to the tooling process issues experienced by the author in industry. Therefore a primary source for issues within the tooling process and the application of Systems Engineering principles are taken from the authors own experience. This paper will also utilize the knowledge and experience of other engineering disciplines and management close to the tooling process by means of personal interviews. Where applicable, literature related to tooling processes, lean methods, and System Engineering processes will be utilized. Included in reference literature will be government and industry standards for typical System Engineering tools; sources will include the DoD and INCOSE. The author will also utilize frequent interaction and review of materials with the project papers advisor, Dr. Galloway. The resulting mix of personnel, literary, industry, and government resources will aid in establishing the best solution in applying Systems Engineering principles and best industry practices to the tooling process.



- Complex tooling efforts, much like major projects, require effective management, planning, and organization.
- A project which commits early product development funding of management, organization, and planning for production and tooling efforts will see appreciable reduction of risk to late term schedules and cost. They will also realize a synergy within the Integrated Product Team which will smooth the transitions from product concept, to design, and production.







### **Integrated Scheduling**

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### **Work Breakdown Structure**





### **Work Breakdown Structure**

Work ID	Work Name	Description	Include (Completion Criteria)	Customer	Asset Type	Complexity	Estimated Effort	Skill Required	Dependency	Hand Off To	Storage/Location
1.0	Project X Structural Assembly Jig	Jig to Assemble Main Structure	Complete Fabrication & Inspection	Project X	Project Specific Tooling	High	5000 Hrs	N/A	Project Schedule	Mechanical Production	
1.1	Tool Design	CAD Model & Drawing	Completed Drawing	Proj. Mgt.	N/A	High	1000 Hrs	CAD	Requriements	Procurement & Mfg.	Main Server
1.2	Design Requriements	System & Hardware Requirements	RequirementS preadsheet	Tool Design	N/A	High	200 Hrs	Design	System Design	Mfg. & Tool Design	Main Server
1.6	Materials	Build Materials	BOM	Mfg.	Material	Moderate	750 Hrs	Material	Tool Concept	Mfg.	Stores
1.6.1	Material Planning	Material Planning	BOM	Mfg.	N/A	Moderate	250 Hrs	Planning	Tool Concept	Proj. Mgt.	Main Server
1.6.2	Procurement	Material & Labor Procurement	Material Delivery	Proj. Mgt. & Mfg.	N/A	Low	500 Hrs	Procuremen t	BOM	Mfg. & Proj. Mgt.	N/A
1.9	Project Management	Project Management	Complete Fabrication	Project X	N/A	Moderate	500 Hrs	Proj. Mgt.	Project Kickoff	Project X	N/A
1.9.1	Cost & Schedule Tracking	Cost & Schedule Tracking	Complete Fabrication	Proj. Mgt. & Project X	N/A.	Moderate	300 Hrs	Proj. Mgt.	Project Kickoff	Project X	Main Server
1.9.2	Estimating	Material & Labor Estimating	Production	Proj. Mgt. & Project X	N/A	Moderate	200 Hrs	Proj. Mgt.	Project Kickoff	Project X	Main Server

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#### **Risk Identification, Management, Planning, & Tracking**

Risk ID	Description	Milestone	<b>Risk Level</b>	Action	Risk Element
		System Requirements Review (SRR)			
		System Definition Review (SDR)		Request Increased Funding	Schedule
		Preliminary Design Review (PDR)		Focus on Long Lead Tooling Elements	Cost
1	Phase Funding Restrictions	Critical Design Review (CDR)	High	Schedule Alterations to Push Tooling Intesive Products	Personel
				Early Procurement	
				Aggressive Procurement Action	Schedule
2	Long Lead Procurement Items	Critical Design Review (CDR)	Moderate	Increased Procurement Funding	Cost
		· · · · · · · · · · · · · · · · · · ·			Schedule
3	Product Design Change	Critical Design Review (CDR)	Moderate	Tooling Design Change to match Product Design	Cost
	¥	······································		Early Verification Plan Definition	
	Tooling to Design Requirements			Engagement with Measurements & Quality Group	Schedule
4	Verification	Production Kickoff	Moderate	Tool Design to Match Product Design	Cost
				Tooling Requirements Change	
5	System Requirements Change	System Requirements Review (SRR)	Low	Tooling Plan Alteration	Cost



High Risk





Low Risk



Risk Item Addressed



Risk Item Partially Addressed



Risk Item Open

Likelihood



#### Consequences



- The Systems Engineering discipline uses architectural tools to describe the operational interaction and function of a complex system; these tools can be used in a similar fashion to describe the interaction within an Tooling Project IPT.
- Operational Views as described by the DoDAF can be used to describe more than hardware interactions.
- A select number of Operation Views from the DoDAF have been chosen to describe the IPT interaction, informational exchange, organizational structure, and functional activity.







### **OV-3 Operational Information Exchange Matrix**

Information				
Description	Node	Information Source	Information Destination	Information Exchange Attribute
			Systems Engineer (N001)	
			Design Engineer (N002)	
Schedule	N007	Project Manager	Production Engineer (N003)	Goals, Milestones, and Progress.
			Systems Engineer (N001)	
			Design Engineer (N002)	
Cost	N007	Project Manager	Production Engineer (N003)	Cost Reporting
			Design Engineer (N002)	
System Requirements	N001	Systems Engineer	Production Engineer (N003)	Requirements Allocation & Negotiation
			Design Engineer (N002)	
			Production Engineer (N003)	
			Tool Designer (N004)	Drawings, Reviews, Producibility,
Design Synthesis	N002	Design Engineer	Integration/Test Engineer (N010)	Testability
·			Tool Designer (N004)	
			Quality Engineer (N006)	Build & Tooling Plan, Need Dates, Long
Tooling Plan	N003	Production Engineer	Production (N008)	Lead Items
			Tool Designer (N004)	
			Quality Engineer (N006)	Production Requirements, Access,
Tooling Requirements	N003	Production Engineer	Production (N008)	Materials, Envelope
			Production Engineer (N003)	
			Production (N008)	
Tooling Concept	N004	Tool Designer	Safety Engineer (N009)	Tooling Concepts & Feedback
Stress Analysis			Design Engineer (N002)	Analysis support for flight and non-flight
Support	N005	Stress Engineer	Production (N008)	structures, Analysis Proofing of Tooling
				Personnel and Hardware Safety
Safety Requirements	N009	Safety Engineer	Production Engineer (N003)	Requirements





Core Project Group

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**OV-5 Functional Activity Model** 



- An important aspect of tooling conceptualization, design, and realization is Requirements Flowdown and Allocation. In this manner the tooling realization process is very similar to the Systems Engineering process.
- Systems Engineering Requirements Flowdown and Allocation process tools can be adapted to reflect the process by which requirements are flowed down and allocated to tooling. In doing so the benefits which have been realized by Systems Engineering groups, including increased organization, reduction of requirements creep or change, decreased cost, reduced schedule impact, and increased disciplinary interaction, can be realized.
- The following tools, adapted from Systems Engineering tools, are intended to spur a process of determining what functions and subassemblies will be needed to satisfy the hardware fabrication and/or assembly requirements.

### **Requirements Flowdown &** Allocation





### Requirements Flowdown & Allocation





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# Requirements Flowdown & Allocation



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### Example Tooling & Hardware







### **Example Tooling & Hardware**





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### **Example Tooling & Hardware**





# Requirements Flowdown & Allocation



		PHY	SICAL	ARCH		3
				MIZII		
				Tube & Store		
				Bonding		
and the second				Assembly Jig		
				(System)		
						 ······································
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	Base		Tube Locators	1 A. 197	Ring Locators	Retainers
	(SubSystem 1)		(SubSystem 2)		(SubSystem 3)	 (SubSystem 4)
Functions						 ·
Flat/Even Surface	X			1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 - 1940 -		
Mount Locations for Additional Tooling	X					·
Stable Platform	X			· ·		
Locate Ring Hardware					Х	 ·
Secure Ring Hardware	1. 	·				 X
Locate Tube on Ring for Bonding			X			
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- The System Views of the DoDAF can prove useful in describing hardware components and their interaction within a system. While often utilized on electronic hardware communications and infrastructure, the DoDAF the Systems Views can also be adapted to describe a tooling system.
- Complex tooling often consists of a number of sub-assemblies and components. As the tooling is realized the complexity of the assembly can lead to a lack of documentation on the necessity of certain features and their function in addressing the hardware and tooling requirements.
- The following System Views will utilize an example tool and demonstrate how these views can effectively describe a tooling system.

### **Tooling Process Architecture**

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### **Tooling Process Architecture**

### **SV-5 Operation Activity to Function Traceability Matrix**

			Mount Ring	Locate Ring	Secure Ring	Locate Tube to Ring
System	Part Identification	Function				
Base	Subsystem 1	Provide a Stable, Flat/Even Surface which allows for mounting of tooling.	X	X	X	X
Modular Plate	Subsystem Component 1A	Provide a Stable, Flat/Even Surface which allows for mounting of tooling.	x	x	x	x
Base Leos	Subsystem Component 1B	Elevate Working Surface to an Ergonomic & Functional Level.	x	x	x	x
Leveling Feet	Subsystem Component 1C	Accommodate Height and Level Adjustment.	X	x	X	x
Tube Locators	Subsystem 2	Locate Tube Hardware with Respect to Ring Hardware per Requirements.				Х
Tube Locating Angle	Subsystem Component 2A	Locating Surface for Tube.				x
Fasteners	Subsystem Component 2B	Secure Tooling Components to Base.				x
Ring Locators	Subsystem 3	Mounting Surface.		X		Х
Ring Locating Angle	Subsystem Component 3A	Locating Surface for Ring.		x		x
Fasteners	Subsystem Component 3B	to Base.	1640-0900 TOTA TO	<u>x</u>		x
Retainers	Subsystem 4	Hardware on Mounting Surface.			X	X
Retaining Angle	Subsystem Component 4A	Retaining Surface for Ring.			x	x
Fasteners	Subsystem Component 4B	Secure Tooling Components to Base.			x	х

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**Tooling Process Architecture** 

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SV-8 System Evolution Description

#### Tube & Ring Bonding Assembly Jig



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- By using a parallel design and evaluation approach to Hardware and Tooling Design schedule and cost risk can be reduced while encouraging inter-discipline interaction resulting in more robust hardware and tooling designs.
- As noted in the Integrated Schedule, the Production Engineer and Tool Designer should be involved on an advisory basis during the hardware design synthesis process. In this way their expertise can be brought to bear on potential hardware concepts.
- By involving the production disciplines early in the project lifecycle and making use of modern Computer Aided Design for hardware and tooling a program can find itself "half way there", in terms of production planning and tooling design, by the time they achieve a stable hardware design.

Design

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### Design

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### **Verification Plan**

Verification Plan

Drawing Number: XXXXXX-XXX

Description: Tube & Ring Bonding Assembly Jig

Hardware	- 44			Tool Dwg.		Verification	
Dwg. Sht.	Zone	Feature	Tooling Dwg. #	Sht.	Zone	Methodology	Comment
							The ring is restrained using the ring
							retainers to the flat base maintaining
							perpendicularity for the subsequent
							tube bonding. The base flatness is
							verified using laser tracker prior to use
1	B2	Ring Perpendicular to Tube Axis	TXXXXXX-XXX	1	C8	Hard Tooling	in assembly.
							Ring Locator detail maintains
							perpedicularity of tube to the base/ring
			•				setup. Laser tracker verification is used
							to align ring locators on base. Inspection
						Hard Tooling &	is used on the ring locators to verify
1	E4	Tube Axis Perpendicular to Ring	TXXXXXX-XXX	2	D4	Laser Tracker	dimensions.
							Ring Locator detail maintains
							concentricity of tube to the base/ring
							setup. Laser tracker verification is used
							to align ring locators on base. Inspection
						Hard Tooling &	is used on the ring locators to verify
1	E4	Tube Concentric with Ring	TXXXXXX-XXX	2	D4	Laser Tracker	dimensions.
							Tube trim and ring height will be
							verified prior to assembly. By verifying
		·					assembly bondline thickness the tube
		Tube Length from Bottom Ring				Tube & Ring	length from the ring bottom suface is
2	C6	Surface	N/A	N/A	N/A	Part Inspection	assured.
							The ring is oriented using existing holes
						Tool	in the base. The base holes are verified
						Verification &	at the tooling level prior to use on
		Orientation of Ring Hole Datum to				Manual	assembly. The tube is oriented with
2	D3	Tube Seam	TXXXXXX-XXX	2	E5	Inspection	respect to the ring using a pi tape.



- The realization of tooling comes to a head when the tooling is fabricated and subsequently verified and validated for its intended purpose.
- The implementation and fabrication of tooling is a group effort relying on a core team and effective management with support from project personnel and engineering disciplines.
- The realization of effective tooling in the implementation and fabrication stage, while similar to the production of hardware, must remain flexible and subject to the appropriate level of scrutiny dependent on its intended purpose.
- As with hardware design, the support of the project team should be available to the fabrication team but the production disciplines must lead the tooling fabrication effort.

### Implimentation/Fabrication



**Fabrication Team** Systems Engineer Project Manager Design Engineer Stress Engineer Production Material Engineer Procurement Quality Engineer Integration Tool Production and/or (Lead Technician) Designer Test Engineer

Core Fabrication Team

**Technical Support** 

### Conclusion



- The paper has sought to balance influences of the Systems Engineering process, as the author was taught in his pursuit of a Master's of Science degree in Systems Engineering, and the cumulative work experience of the author as an engineer practicing in the field of production and tooling.
- The paper has illustrated the necessity of involvement of production/tooling engineers within Integrated Product Teams early in the hardware product life cycle.
- It has emphasized concurrent engineering practices and asserts that they are imperative to the efficient establishment of tooling needs and processes.
- The paper demonstrated how Systems Engineering and Architecting tools can be used to a tooling projects benefit through the phases normally associated with hardware or software product development.
- The use of these tools and best practices with tooling was cited as being scope dependent.
- This paper is intended to be an outline for experimental use of Systems Engineering tools and processes along with best industry practices.
- Despite the need for future work on these tools and process the papers conclusion stands that a tooling process, based on Systems Engineering principles, that is ingrained in the product life cycle and which thoroughly documents associated technical and producibility requirements will reduce the issues currently prevalent in complex tooling realization.



# **Backup Slides**

### **Example Statement of Work**

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- Scope
- This Statement of Work is to provide a technical and management overview of the requirements for the design and fabrication of the Tool. Design of the Tooling shall be performed by Tool Design in conjunction with Production Engineering and Design Engineering. Fabrication of the tool shall be carried out by the appropriate Production Department in conjunction with Production Engineering. All conditions relative to this SOW will be approved in writing by Project Management prior to the start of performance on this project. Project Management reserves the right to review and inspect the deliverables outlined for the Tooling.
- •
- Management
- •
- Semi-monthly management reviews and/or Technical Interface Meetings (TIM) will be conducted at the discretion of Project Management. The reviews will address technical concerns, schedule, quality and key personnel. Notification of key personnel changes will be made to the responsible Project Management. Key personnel changes are meant to include responsible Project Management, Quality, Production Management, Design Engineers, Production Engineer, Tool Designer, and technicians for design and fabrication of the Tooling. Progress of the project will be made available to Project Management electronically via Microsoft Project or "Gating" charts or another mutually agreed to format.

•

- A Preliminary Design Review (PDR) will be held prior to the final approval of Tooling design. Requirements for the PDR are as follows:
- •
- Representatives: Project Management, Design Engineering, Production Engineering, Tool Design, Quality Engineering, Materials & Process Engineering
- A detailed CAD model.
- The first level basic drawing identifying all critical hardware interface locations. These locations should be dimensioned and geometrically toleranced, as appropriate, to illustrate the functional capacity of the Tooling. Individual detail level drawings are not necessary at this time.
- A basic Bill of Materials (BOM) with all major component materials identified. Long lead materials and items are to be identified at this time. Off the shelf items, such as fasteners, need not be definitively quantified or identified at this time if they are readily available.
- A detailed schedule in Microsoft Project format shall be included in the review. The schedule shall reflect the completion of the part design effort and the availability of fabrication resources.
- The PDR shall also address the following:
  - Technical risks with mitigation plans
  - Unique or new materials and/or processes.
  - Inspection plan.

### **Example Statement of Work Cont.**



- A Manufacturing Readiness Review (MRR) will be held XX months from the start of fabrication of the Tooling. Requirements for the MRR are as follows:
- •
- A completed Tooling Drawing.
- Concurrence and signoff from the core engineering team including, at a minimum, Production Engineering, Design Engineering, and Tool Design.
- A detailed manufacturing plan, using a flowchart or comparable format.
- The detail plan shall contain all the manufacturing operations required to produce the Tooling, along with the associated tooling, machine tools, facilities and processes. The detail plan shall include inspection points and processes.
- A detailed schedule in Microsoft Project format shall be included in the review. The schedule level of detail shall match the manufacturing operation level of detail including inspection operations.
- The MRR shall also address the following:
  - Technical risks with mitigation plans
  - Unique or new materials and/or processes.
  - Inspection plan.
- •
- •
- - **Technical Requirements**
- Tooling
  - Application: Assembly Jig for Part XXXXXX Quantity: X
    - Design per released part Design XXXXXX Rev. XX
  - Dimensions: (X) Long X (X) Wide
    - Minimum Deck Height
    - X" or Greater Deck Height requires a Step
    - Multiple Sections to Achieve Total Length is Acceptable
      - Section or Table Weight cannot Exceed X Tons for transportation purposes in the work area.
    - Total Length Flatness of .XXX" or Better
  - Modular Hole Pattern: (X) X (X)Alternating Through Hole & Threaded Hole
    - Through Hole .XXX" +.XXX"/+.XXX"
    - Threaded Hole X-X, X" depth, Starter Hole to Penetrate Total Thickness of Deck
    - Holes are to Align along Length of Base and Width of Base to within .XXX" from First Hole to Last Hole. This Applies to Total Length Despite the use of Multiple Base Sections.
  - Material: Minimal CTE, Maximum Stability

### **Example Statement of Work Cont.**

#### Support Requirements

- Tooling Base Shall be Capable of Supporting the Following with Minimal Distortion (Less than .XXX")
  - Less than XXXIbs of Assembly Weight
  - X Technicians, Each Less than 300lbs
  - XX" X XX" Isolated Load Should not Exceed XXXIbs
  - Total Distributed Load Should not Exceed XXXXIbs
- Features
  - Adjustable Leveling Feet
  - Base Shall be Free of Trip Hazards
  - Prepare and Paint on Non-Interface Surfaces
  - Rust Inhibiting Treatment on Un-Painted Surfaces
- Design Requirements
- ANSI/ASME 14.5 2009
- XXXXX Company Design Standards
- XXXXX Company Drawing Format
- XXXXX Company Quality Requirements
- XXXXX Company Safety Standards
- OSHA Safety Standards
- Fabrication Requirements
- XXXXX Company Fabrication Standards
- XXXXX Company Process Requirements Specifications
- XXXXX Company Quality Requirements
- XXXXX Company Safety Standards
- OSHA Safety Standards
- •
- Schedule
- Design and production schedule (Microsoft Project based) shall be maintained by Program Management with the support of Production Engineering, Tool Design, and the shop floor. Any deviation from established schedule in excess of XX weeks may require a working group review at the discretion of Project Management.
- •
- Quality Assurance Requirements
- Existing organization and Product Assurance system shall be utilized to the maximum extent possible to meet the project requirements. The design and fabrication groups shall maintain a Quality Assurance System that complies with XXXX and XXXX. The Quality organization will have the option to survey and verify conformance yearly.



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### Reduced Dimension Drawings and Solid Models



### • The Design:

- Every threaded feature should be modeled at the minor thread diameter and noted as a threaded hole on the drawing
- Relax the requirements for noncritical features.
- Notate performance critical features for inspection purposes.
- Model made to nominal tolerance to aid manufacuring.

### • The Alternative:

- Fully dimensioned drawing

### • The Impact:

- A much less costly design that still meets the requirements of functionality.
- Reduced programming time.
- Reduced inspection time.



The Lesson: Understanding of what feature is critical and what is not in a design, can help avoid costly manufacturing processes and could reduce inspection time.

#### LMU LA College of Science and Engineering

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### **Indentured Parts List**



Item Number Revisio	on Dwg.#	Dash No. Qty	/	rder of Assemb	ly	<b>Drawing Title</b>	Material	Spec.	Zone
1 N/C	www	1	1 1			Base	Steel	W	
2 N/C	XXX	1	4	2		Leg Assy.	Steel	Х	
3 N/C	YYY	1	1		3	Leg Adjust.	Steel	Y	
4 N/C	ZZZ	1	1		3	Foot	Steel	Z	

#### **Verification Based Tooling &** College of Science **Methods** and Engineering **Tooling/Construction Ball &** SMR & Mount Mount +.0002 -2.50 #10-24 TAP, C'BORE 15/64 X 1/2 DEEP 2.00----EDIA BP 1.88 A+.0005DIA BALL DIA -1.60 ---ADIA 180 #10-24 TAP THRU (2) PLACES 1,40 1,20 CTHREAD .5000 diameter smr 2.0 DDEEP reference on c/l within 1,00 Style 1 +/-.0005 "H" +/-.0005 FOR 5/16-18 1.25 to c/lof sphere 15/64 DRILL THRU (2) PLACES (CAN BE ENLARGED FOR 1/4 DOWELS) magnet OR M8 SOCKET-HEAD CAP SCREWS ±.0002 (2) HOLES magnet - E DIA TBP .5000 +/-.0005 BALL DIA 5000±.0005 A DIA 180 **C THREAD** D DEEP **Photogrammetry** Style 2 **Targets**

### **Verification Methods**









#### **Coordinate Measuring**







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