WinISI 2009

Procedures & Reference Manual

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User Account Manager

Introduction

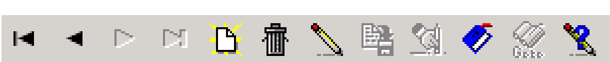
Overview

WinISI is a computer software system which allows utility personnel to track Inservice Inspection (ISI) examinations at nuclear power plants. These examinations include planning, scheduling, tracking, reporting, and analyzing the progress of inspections performed on welds, components, and component supports. WinISI software was developed with the assumption that you have a working knowledge of ASME Section XI (Code).

WinISI was designed specifically to relieve utility personnel of the necessity of manually tracking ISI examinations required by the ASME Boiler and Pressure Vessel Code, Section XI, "Rules for Inservice Inspection of Nuclear Power Plant Components" (the Code) and the Code of Federal Regulations, 10CFR50. WinISI allows you to easily enter information pertaining to the different components that are found in both Pressurized Water Reactor and Boiling Water Reactor Nuclear Plants. When properly used, WinISI will satisfy the ISI documentation requirements of the Nuclear Regulatory Commission for nuclear power plants.

Command Bars

Many of the common program functions are grouped into button bars called "command bars". Most of WinISI's windows incorporate at least one command bar. In cases where the window in question includes sub-lists of associated data records, there will be additional command bars for those lists. A typical command bar is shown below.



The command buttons and the functions they perform are described in detail below. Note: In many cases, some of the buttons described below will either be omitted from the command bar or disabled, indicating that their respective functions are not applicable.

Close - Closes the window.

Help - Displays help information for the window.

First - Move to the first record.

Prior - Move to the previous record.

Next - Move to the next record.

Last - Move to the last record.

New Record - Adds a new record to the database.

Delete Record - Permanently erases the displayed record. A confirmation dialog is always displayed first, giving the user an opportunity to cancel the delete.

Edit Record - Places the displayed record in "edit" mode, allowing fields to be entered and/or modified.

Post Edit - Saves any changes made to the displayed record during editing. *WinISI will do an automatic "Post" before moving to another record or closing the window.*

Cancel Edit - Cancels any changes made to the displayed record during editing. When an edit is canceled, all fields are restored to their pre-edit state. A confirmation dialog is always displayed first, giving the user an opportunity to retain the changes.

Refresh Data - Reads the displayed record from disk and updates the display. This button is useful in a shared-data installation where multiple users may be modifying data concurrently.

Set Bookmark - This button works in conjunction with the Return To Bookmark button to provide a convenient way to mark and quickly return to a record in the database. To mark the displayed record, click the button. To return to the marked record, click the Return To Bookmark button (below). *Note that bookmarks are lost when the WinISI session is terminated.*

Return to Bookmark - Displays a previously-book marked record. See Set Bookmark (above) for details.

Locate -Displays a search dialog to aid in locating records in a large database. The search dialog allows the user to locate a record using all indexes available for the database in question.

 **Print** - If a record-print option is available for the database, clicking this button initiates the print operation.

 **Modified By** - Displays a dialog showing the date and time the currently displayed record was last modified. The username of the person who did the modifications is also displayed.

Product Support

Technical assistance is available to registered customers via Email or telephone. If you experience problems with WinISI, contact us via phone or Email at the numbers provided below. If you get the answering machine, please leave a message. We are a small company and are not able to man the phones at all times. On such occasions, our answering machine will be on. We return most calls within a few hours, and we do our best to get back to everyone within a day. We often return calls on weekends and in the evening, so you can leave both a home and business number if desired.

Technical Assistance Contacts

Email: jimnorth@polaris-microsystems.com
Voice: 1-410-810-1030

Initial Setup Procedures

Initializing Data Files

Data File Location

WinISI, database files can reside the local hard drive, or on a centralized network file server. The default location is in a folder named “Data”, located in the program installation folder on the local drive.

The data file location, or “Data Path” can be altered via the **Set Data Path** function, or the **Database Manager** function located in the File pull-down menu in WinISI

> ☞ In “multi-user” (networked) environments, WinISI can be installed on a cental application server. Regardless of where the application resides, the “Data Path” referred to above is stored on the local drive of each workstation. This requires initialization of the data path on each workstation (via the procedure above), even when the data folder also resides in a common area..

Data File Creation &Initialization

At startup, WinISI will automatically verify the presence and also the structure of data files in the specified data folder. Any missing files are created, and if necessary, the structure (field and index specifications) will be updated. Typically, no further initialization is required.

> ☞ In “multi-user” (networked) environments, the automatic file creation and validation function described above requires that the “user” has been granted file creation/modification permissions for the specified data folder.

Establishing A Data Backup Procedure

The **Database Manager** (see the File pull-down menu) includes a built-in backup function which will copy the entire database into a single compressed library file. (The backup library file is a standard PKZip™ format file, however a file extension of "CIB" is used so that the program can easily identify its own backup files.) The file can be directed to any local or mapped network drive accessible from the workstation.

However, running a backup to the same floppy disk or Zip™ disk every time, while better than no backup at all, offers only minimal protection against data loss. The problem with this scheme is that, often times, a damaged data file (the WinISI database consists of many linked data files) is not discovered until well after the damage has occurred. If you run a backup before you discover the damage, you will overwrite the potentially good backup with a corrupt one.

The best way to safeguard against this scenario is to maintain multiple levels of backup, each one progressively older. If a damaged file is not discovered until a few days later, there will be a much better chance of having a good backup on hand.

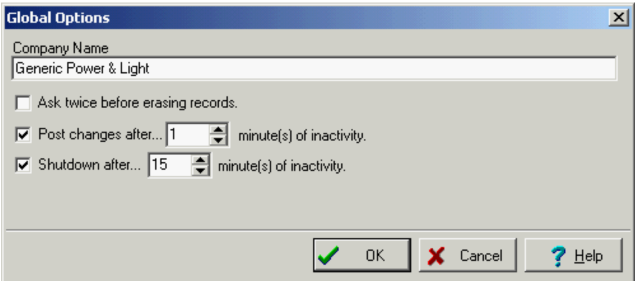
The easiest way to establish and maintain a multiple-level backup is to use a rotating daily backup scheme whereby a different disk is used for each day of the week. Each time you run the Backup function -- even if you don't do a backup every day -- you use the appropriate disk for that day.

Setting Global Options

Global program options (i.e. options that apply to the program itself and to specific functions performed by the application) are set via the Configuration pull-down menu in the main application window The menu items are:

- **Program Options...** -- Opens the Global Options dialog. The majority of the program options are set via this dialog. See *Program Options Dialog* below for information about the settings contained therein.
- **Multi-Record Editing** -- Normally when editing records in WinISI, you must manually place each individual record in edit mode by clicking the Edit Record button in the command bar. This can make for tedious work when you need to make changes to several records in a session. With Multi-Record Editing enabled, if you edit a record and then move to another record, the screen stays in edit mode. You only need to click the Edit Record button once.
- **Display Popup Hints** -- Enables display of pop-up hints for various fields and buttons within WinISI. To display a pop-up hint, position the mouse pointer over the item and hold it there for a short while.
- **Verify Shutdown** -- Enables the program shutdown confirmation dialog box.

Program Options Dialog



- Company Name – This "global" setting is provided primarily for reporting purposes.
- Delete Confirmation -- This setting controls how enthusiastically WinISI asks for confirmation before deleting records.
- Inactivity Timeouts -- WinISI detects long periods of inactivity (the absence of mouse motion and/or keystrokes) and automatically posts changes to data records, closes open windows, and ultimately shut itself down. You can disable the inactivity timeouts and/or modify the time periods by adjusting these fields.

☞ Testing for periods of inactivity and taking the appropriate measures is critical in the multi-user environment. For example, if user places a record in edit mode and then leaves his workstation, all other users are prevented from working with the locked record until he returns and posts his changes. The inactivity timeout feature prevents this situation from occurring.

Setting Up Access Control

Controlling access to the WinISI program and the functions and data therein is accomplish through a system of user permission settings. In order to set up access control for WinISI, you need to create a list of users and assign specific permissions to each. The permission settings for a user determine what functions and areas within WinISI he or she is allowed access to. For example, you can set up permissions such that an NDE Examiner can view all NDE Qualification records, but only modify his or her own.

Designating a System Administrator

In order for access control to work (and make sense) you need to assign one trusted individual the task of being the "System Administrator". The System Administrator is responsible for creating and maintaining the user's list.

Setting the Master Password

The user's list is created and maintained using a built-in, password protected utility, accessed via the *Manage User Accounts* option in the *Configuration* menu in the main window. The password used to enter this utility is called the "Master Password". Obviously, the Master Password should be known only by the System Administrator.

When WinISI is first installed, the Master Password is initialize to "MASTERKEY". The first task of the System Administrator is to change this password. To do this:

- Select from the *Manage User Accounts Configuration* menu.
- When asked to enter the password, respond by entering "MASTERKEY" (excluding the quotes). The program window will be displayed.
- Click the Change System Administration Password button. Enter "MASTERKEY" in the first box (old password), then enter a new password in the second box (new password). Repeat the new password in the third box to verify and check for typos, then click Ok.

The next time you start the account manager, enter your new password. If you forget your password contact Polaris Microsystems for assistance.

Creating the User List

The following explains how to add new WinISI user accounts. First you'll be adding a "default" user with permission settings typical for most users.

- Click the  button . When prompted for the Username, enter "DEFAULT" (exclude quotes) then click Ok.
- Click the  button , then assign the permissions which most closely match the settings you want for the majority of users.
- Click **Save as Default**. This will save the settings so they can be automatically assigned to new users when they are added to the list.

Once the "default" permissions have been established, you can add individual users via the  button. If necessary, use the command bar buttons to edit the users list and fine tune the permission settings.

Setting Initial User Passwords

> ☞ A user's password is masked from view until the record is placed in edit mode by clicking the Edit Record button.

When a new user is added, the program presets the new user's password to a code based on the first two characters of the Username. As System Administrator, you can either ask each user to choose a password and alter them yourself; or you can just give each user their preset password and allow them to change it from within WinISI using the Change Password function ([File|Change User Password...]). The choice is yours.

Managing Unit-Specific Data

WinISI data specific to particular reactor site or “unit” is stored a separate sub-folder within the main WinISI data folder. These unit-specific data folders store the ISI Plan & Results database, and the optional IST (Pump & Valve) database for the unit in question.

Each unit-specific database is identified by a 3-character plant code and a 1-character unit designator. For example, the demonstration database that is installed along with WinISI contains a unit-specific database designated by a plant code of “000" and a Unit Designator of “1".

WinISI supports an unlimited number of plants (plant codes), and each plant can have up to four unit-specific databases (“units”).

Unit-specific databases are created and selected via the *Select Plant/Unit Dialog*, accessible from the File pull-down menu in the main application window.

Using the Select Plant/Unit Dialog

If necessary, open the *Select Plant/Unit* dialog by selecting [File|Select Plant/Unit...] from the main window pull-down menu. All functions are performed from this dialog.

Selecting an existing unit database

- Double-click on the desired plant in the list. The selected plant code will be displayed in the Active Plant/Unit area at the bottom of the dialog.
- Use the Unit radio buttons to select the desired unit.
- Click OK to complete the selection and close the dialog.

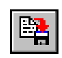
Adding a new Plant Code

- Click the . When prompted, enter a unique 3-character plant code for the new plant, then click OK. Modify the Plant Name by editing the new entry in the list
- Click  to save the changes.
- Follow the procedure above to select the new plant code and the desired unit number.
- Click OK to close the dialog and create the new database.

Adding a new unit to an existing plant

- If necessary, select the plant by double-clicking on it in the list.
- Use the radio buttons at the bottom to select the new unit number.
- Click OK to close the dialog and create the new database.

Renaming an existing plant

- Select the plant by clicking once on it in the list
- Click  then modify the Plant Name as desired.
- Click  to save the changes.

Working with ISI Records

All ISI related functions within WinISI are accessed from the *ISI Plan & Results* window. To open this window, click the **ISI Plan & Results** button in the main window.

Setting ISI Plan Options

Setting Plan Status Grid Options

- Select ISI Options... from the Configuration menu.
- Edit the options as desired then click OK.

Setting Outage Information

- Select Outage Setup... from the Configuration menu.
- Edit the outage list as necessary, making entries in the Outage # column, and optionally the Year column.

Defining Plan Status Codes

Plan status codes (“X”, “C”, etc.) can be defined as desired by the ISI coordinator. The only requirement is that at least one code be designated as a “scheduled” code, and one as a “completed” code.

- Select Status Code Definitions... from the Configuration menu.
- Edit the list, making entries in the Status, Description, Type and Count columns. *A check mark in the Count column indicates that the code is counted toward Section XI percentage requirements.*

Renaming Custom Fields

WinISI includes 11 custom component record fields (located on the Component Info 2 tab) and 5 custom results record fields (located on page 2 of the Results tab). The captions for these fields can be customized as follows.

- Double-click on the caption you want to change. A dialog box will be displayed.
- Enter the desired caption for the field, then click OK.

Locating a Component

Using the Navigator Buttons

You can move through the component records via the four navigator buttons  located in the command bar just below the pull-down menus at the top of the window.

Using the Locate Component Dialog

- Click  at the top of the window.
- Select the desired search key in the Search By field at the bottom of the dialog
- Begin typing the desired key value into the Search Characters field at the top until you see the desired record in the list.
- Double-Click on the record to select it and close the search dialog.

Using Plan Views

Locate the View combo box in the lower left-hand corner of the window. To change the view, drop down the list and select the desired view. The available views are...

- Normal - All ‘in service” components are visible
- Outage - Only components which are scheduled for examination during the current outage are visible.
- Removed - Only components which have been Removed from Service are visible.

Using Filters

The Filter facility allows you to specify record selection criteria based on the contents of various fields. When activated, only the components which match the criteria are visible. To set a filter...

- Click the  button in the Filter area at the bottom of the window.
- To filter on the Plan Status for the current outage, enter the status code(s) you are searching for in the Plan Status Filter area at near the top of the Filter Dialog.
- To filter on the contents of other fields, select the desired field name, the comparison operator and the contents you are searching for in the Character Search area.
- Click **OK** to close the dialog and activate the filter, or click **Cancel** to cancel the filter changes.

Modifying Components

Adding a new Component

- Click in the command bar at the top of the window. A dialog box will appear, requesting a unique Summary Number. (Components are ordered via Summary Number.)
- Enter a Summary Number for the new component, then click **OK**.
- Enter field information as desired.
- Save the record by clicking .

"Cloning" a Component

In many cases, a new component will have many of the same field values as an existing component record. To save time, you can "clone" the existing component using the procedure below.

- Locate the component you wish to copy.
- Pull down the *Component* menu and select *Copy...*
- Click in the command bar at the top of the window. Enter a Summary Number for the new component, then click **OK**.
- Pull down the *Component* menu and select *Paste...*
- Modify fields as necessary, then click .

Editing a Component

- Locate the record to be modified (see above).
- Click in the command bar just below the pull-down menus at the top of the window.
- Modify the record field(s) as necessary.
- Click to save the changes, or...
- To cancel the changes made to the displayed record, click .

Changing the Current Outage

- Select the desired outage number in the <u>Outage</u> combo box near the top of the window, or...
- Double-click on the desired outage in the <u>Plan Status</u> area on the left side of the window.

Modifying the Plan Status Grid

- Select the outage you want to change (see above).
- Select the desired status code using the <u>Status</u> combo box just below the <u>Plan Status</u> grid.
- Click to save the changes.

Removing & Deleting Components

Removing a Component from Service

"Removed" components remain in the database, but are excluded from the various ISI functions and reports. A "removed" component can be restored to service.

- Locate the component you wish to remove.
- Pull down the *Component* menu and select *Remove from service...*

Restoring a Component to Service

- Change the View to "Removed"
- Locate the component you wish to restore.
- Pull down the *Component* menu and select *Restore to service...*
- Change the View to "Normal"

Deleting a Component

CAUTION: Deleting a component permanently erases it from the database. All associated results records, if any, are also permanently erased.

- Locate the component you wish to delete.
- Click .

Entering Results

Results records are displayed from the Outage Results tab in the window. Only the current outage is displayed.

Creating Results Records

This function creates new Results records for components schedule for examination in the current outage. If a record was previously created, it is retained. Therefore, you can run this function any number of times for an outage without creating duplicate records.

- Select the outage you want work with.
- Pull down the *Results* menu and select *Create Results Records...*

Entering Results Indications

A single Results record can record indications for any number of examination methods. When a new Results record is created, Method records are created for each NDE Method specified in the Component record (Component Info 1 tab). These records can be edited, and additional Method records can be added using the buttons to the right of the list.

Re-scheduling Incomplete Examinations

Any component examinations which were not completed during an outage, can be "carried over" to a subsequent outage. Both the Plan Status Code and the Results record (if any) are moved.

- Pull down the *Results* menu and select *Carry Over Incomplete Exams...*
- Select the "destination" Outage in the pop-up dialog, then click **Ok.**

Setting Code Parameters

Selecting a Code Edition Table

The current Code Edition is selected via the Code combo box located at the upper right-hand corner of the *ISI Plan & Results* window.

Editing a Code Edition Table

- Select Edit Code Editions... from the Code menu. This will open the *Code Editions* window.
- Select the desired Code Edition table by clicking on the appropriate tab at the bottom of the window.
- Locate the code table record to you want to edit, then click  to edit the record ...*or*... click  to add a new record to the table.
- Modify the record as desired, then click  to save the changes.

Cloning a new Code Edition Table

- Select Edit Code Editions... from the Code menu. This will open the *Code Editions* window.
- Select the Code Edition table you want to clone by clicking on the appropriate tab at the bottom of the window.
- Click **Create New Code Edition**. When prompted, enter an identifier (name) for the new table, then click **OK.**
- Edit the new table (see procedure above) as desired.

Modifying Code-Table Cross Reference

The *Code Table Definitions* list is a "look-up" table used by WinISI to cross reference Item # groupings with Code Table designation ("A", "B", etc.)

- Select Code Table Definitions... from the Configuration menu.
- Edit the list as necessary, entering a complete or partial item number in the Item # begins with... column, and the corresponding table letter in the Table column.

Modifying NDE Method Count Groups

The NDE Method Count Grouping list controls how various NDE methods are grouped by the NDE Method Counts report. For example, various VT methods (VT-1, VT-2, etc) can be grouped together and counted as just "VT".

- Select NDE Count Grouping... from the Configuration menu.
- Edit the list as necessary, entering a specific NDE method in the Method column, and the corresponding method group in the Count As... column.

Printing ISI Reports

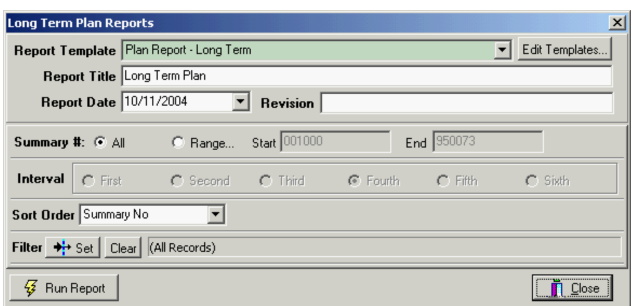
Long Term Plan Reports

This report group includes the following report templates...

- Plan Report - Long Term – A complete printout of the ISI Long Term Plan.
- Plan Report - Interval – An ISI Long Term Plan report containing only the components with scheduled or completed ISI activity in the selected Interval.
- Risk Informed Plan – A plan report containing components where a valid Risk Category has been specified.
- Removed Components - A plan report listing components which have been removed from service.

To print a report...

- Open the Long Term Plan Reports dialog by selecting [Reports|Long Term Plan Reports...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set Summary # range and Interval filters as desired. *Note that these options may be disabled for certain templates.*
- Select a Sort Order as desired to control the order of the records in the report. *Note that this option may be disabled for certain templates.*
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

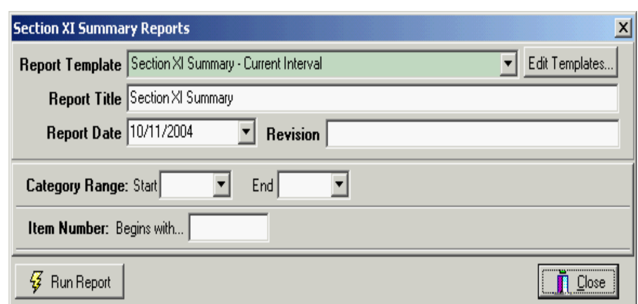
Section XI Reports

This report group includes the following report templates...

- Section XI Summary – Section XI counts and percentages for the selected interval, grouped by code Category and Item #.
- Section XI Category Summary – Section XI counts and percentages for the selected interval, grouped by code Category only.
- Section XI Plan Summary – A plan report similar in format to the Long Term Plan report (see above) , but sorted and grouped by code Category and Item, and including section XI counts and percentages for the selected interval.
- Scheduled/Completed Summary – Section XI counts and percentages for the current outage, grouped by code Category and Item #.
- Scheduled/Completed Category Summary – Section XI counts and percentages for the current outage, grouped by code Category only.

To print a report...

- Open the *Section XI Summary Reports* dialog by selecting [Reports|Section XI Reports...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set the Category Range and Item Number filters as desired. *Note that these options may be disabled for certain templates.*
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

NDE Method Count Reports

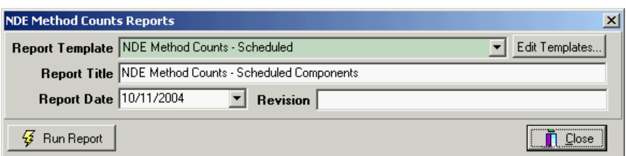
This report group includes the following report templates...

☞ The NDE Method Count Groups list (see previous chapter) determines both the NDE methods counted, and how the counts are grouped.

- NDE Method Counts - Scheduled – Prints a count of the number components scheduled for each NDE method during the current outage.
- NDE Method Counts - Completed – Prints a count of the number components completed to date for each NDE method during the current outage.

To print a report...

- Open the *NDE Method Count Reports* dialog by selecting [Reports|NDE Method Counts...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Click Run Report.

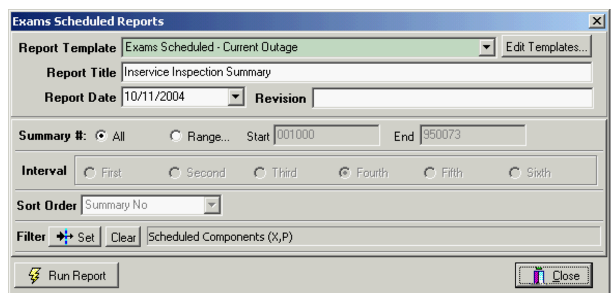
Exams Scheduled Reports

This report group includes the following report templates...

- Exams Scheduled – List pertinent information for all components scheduled for examination during the current outage.
- Incomplete Exams by Category/Item – Prints a list of components scheduled for examination, but not yet completed. The list is sorted and grouped by code Category and Item #.
- Incomplete Exams by System – Same as above, only sorted and grouped by System.

To print a report...

- Open the *Exams Scheduled Reports* dialog by selecting [Reports|Exams Scheduled Reports...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set Summary # range as desired.
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

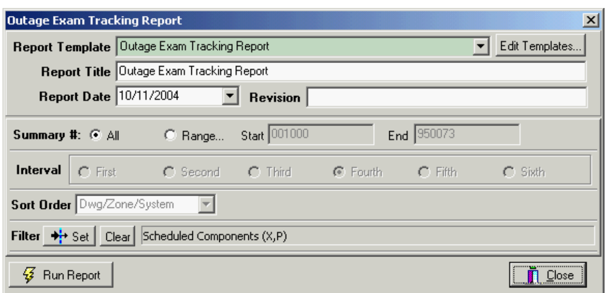
Outage Exam Tracking Reports

This report group includes the following report templates...

- Outage Exam Tracking Report – Prints a tracking form listing all components scheduled for examination, with “sign offs” (initials and dates) for preparation, examination and restoration phases.
- Outage Status Report – Prints pertinent details for components scheduled for examination, including NDE Method, preparation & restoration requirements, drawings and instructions.

To print a report...

- Open the *Outage Exams Tracking Reports* dialog by selecting [Reports|Exam Tracking/Status...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set Summary # range as desired.
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

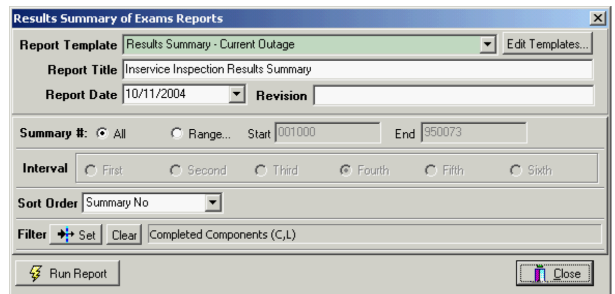
Results Summary of Exams Reports

This report group includes the following report template...

- Results Summary - Current Outage – Prints a detailed report of indications and results for each completed component examination.

To print a report...

- Open the *Results Summary of Exams Reports* dialog by selecting [Reports|Results Summary of Exams...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set Summary # range as desired.
- Set the report Sort Order as desired.
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

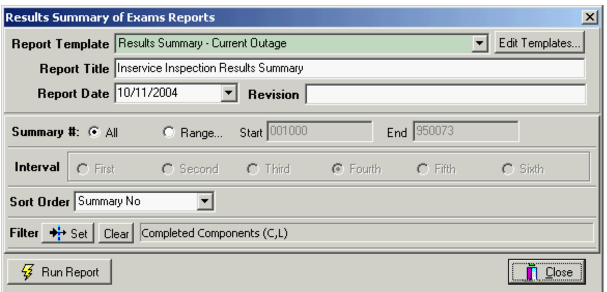
Exam History Summary Reports

This report group includes the following report template...

- Exam History Summary – Prints a component by component summary of all indications and results for all outages to date.

To print a report...

- Open the *Exam History Summary Reports* dialog by selecting [Reports|Exam History Summary...] from the menu at the top of the *ISI Plan & Results* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Set Summary # range as desired.
- To further limit the records included in the report, click the Set button in the Filter area at the bottom of the dialog.
- Click Run Report.

Working with Examiner Qualification Records

All Examiner Qualification functions within WinISI are accessed from the *NDE Examiner* window. To open this window, click the **NDE Examiner** button in the main window.

Locating Qualification Records

Using the Navigator Buttons

You can move through existing records via the four navigator buttons located in the command bar just below the pull-down menus at the top of the window.

Using the Find Examiner Dialog

- Click at the top of the window.
- Select the desired search key in the Search By field at the bottom of the dialog
- Begin typing the desired key value into the Search Characters field at the top until you see the desired record in the list.
- Double-Click on the record to select it and close the search dialog.

Modifying Qualification Records

Examiner qualification records include the following...

- Education & Experience Records
- Method Certification Records
- Experience Records
- History Records

The various records are accessed via the Tabs located on the left side of the window. Multiple Certifications can be tracked for each examiner. You can view a summary list of all Certifications or view details about individual Certifications by selecting the tabs on the right of the window.

Creating an Examiner Record

- Pull down the *Examiner* menu and select *New...* A dialog box will appear, requesting a unique Employee ID.
- Enter an ID for the new Examiner, then click **OK**.
- Complete the Name and Eye Examination fields, and optionally the Education and Experience fields (Education & Experience tab).
- Save the record by clicking .

Adding a Method Certification Record

- Select the Certifications tab.
- Click in the command bar at the top of Certifications tab.
- Select the Method and Certification Level for the new record, then click **OK**.
- Enter field information as desired. If the new record is for UT, enter PDI information using the buttons in the PDI Qualifications area.
- Save the record by clicking .

Logging Experience Hours

- Select the Experience Log tab.
- Click in the command bar at the top of the tab.
- Record the experience information in the NDE Experience Log Dialog.
- Click **Save & Close** to save the record and close the dialog, or...
- Click **Save & New** to enter multiple records..

Modifying Examiner Status

Manually Status Changes

- Locate the Examiner record (see above) then select the appropriate Certification record.
- Click in the command bar at the top of the Certification tab.
- Select the desired status in the Current Status combo box.

1. Save the change by clicking .

Using the Check Examiner Status Function

This function is triggered by clicking the **Check Examiner Status** button. It scans the entire Examiner database and checks Eye Exam dates, Method Examinations, and Experience Hours. Where the scan indicates, the Current Status is changed to "Suspended" and appropriate History Log entries are made.

Configuring the NDE Examiner Window

Setting NDE Options

- Select *NDE Options*... from the *Configuration* pull-down menu.
- Modify the qualification parameters as necessary, then click **OK**.

Editing Supporting Lists

The *Configuration* menu contains several options for editing NDE Qualification-related lists. These lists contain default entries which will not, in most cases, require modification.

Printing Examiner Qualification Reports

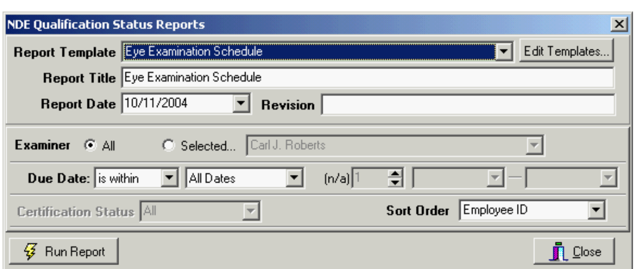
Qualification Status Reports

This report group includes the following report templates...

- Eye Examination Schedule – Lists the date of the last eye examination and date the next eye examination is due for each NDE examiner.
- Qualification Examination Schedule – Lists the expiration date and status for method certifications held by each NDE examiner.
- Qualification Summary – Prints a complete examiner qualification summary for each examiner, including experience hours, examination dates and grades, and qualification status for each method certification.
- Suspended Examiners – Similar to the Qualification Examination Schedule, but including only "suspended" certifications.

To print a report...

- Open the *NDE Qualification Status Reports* dialog by selecting [Reports|Qualification Status Reports...] from the menu at the top of the *NDE Examiners* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Choose "All" examiners, or select a specific examiner as desired.
- Set the Date and Status filters, and the Sort Order as desired.
- Click Run Report.

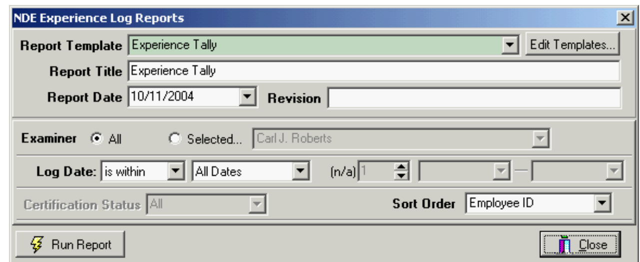
Experience Log Reports

This report group includes the following report template...

- Experience Tally – Prints NDE method experience hours totals for each examiner within the specified date range.

To print a report...

- Open the *NDE Experience Log Reports* dialog by selecting [Reports|Experience Log Reports...] from the menu at the top of the *NDE Examiners* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Choose "All" examiners, or select a specific examiner as desired.
- Set the Log Date filter, and the Sort Order as desired.
- Click Run Report.

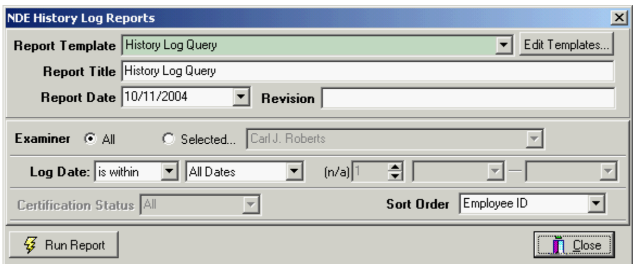
History Log Reports

This report group includes the following report template...

- History Log Query – Lists changes to the qualification and experience records of examiner certifications as recorded in the Certification History log.

To print a report...

- Open the *NDE History Log Reports* dialog by selecting [Reports|History Log Reports...] from the menu at the top of the *NDE Examiners* window.



- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Choose “All” examiners, or select a specific examiner as desired.
- Set the Log Date filter, and the Sort Order as desired.
- Click .

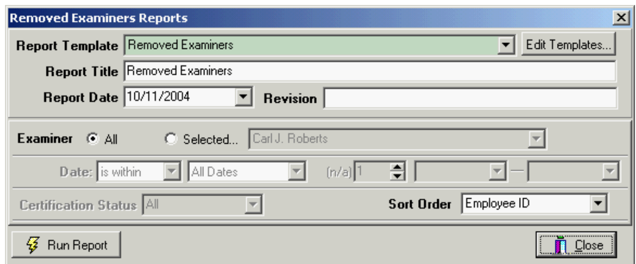
Removed Examiners Report

This report group includes the following report template...

- Removed Examiners - A report listing examiner records which have been removed from the active list.

To print a report...

- Open the *Removed Examiners Reports* dialog by selecting [Reports|Removed Examiners Reports...] from the menu at the top of the *NDE Examiners* window.



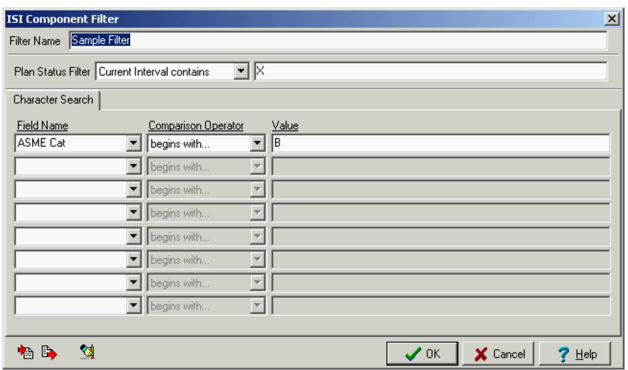
- Choose the report you want to run from the Report Template drop down list. If desired, you can customize the report title, date and revision.
- Click .

Using ISI Component Filters

Overview

An ISI Component Filter (ISI Filter) allows you to isolate a subset ISI Plan component records which match a specific search criteria. For purposes of discussion, this subset will be referred to as a "Filtered View". Filtered Views can be used to do the following:

- Restrict the component records which are displayed in the *ISI Plan & Results* window. This allows you to browse through or edit a small group of related components without having to wade through the entire plan database.
- Restrict the records included in various ISI reports.

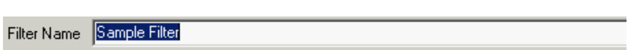


The *ISI Component Filter* dialog is used to specify the search criteria which will define the filtered View. The window is divided into several regions, discussed below.

Command Buttons

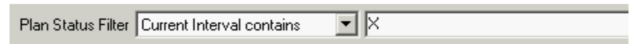
The Clear button  at the bottom of the window resets the filter to a null or "include all records" state. Save Filter  and Load Filter  buttons allow filters to be saved for later retrieval and re-use.

Filter Name



The <u>Filter Name</u> is simply a descriptive title for the Filter. It does not affect the View created by the Filter, and can be left blank.

Plan Status

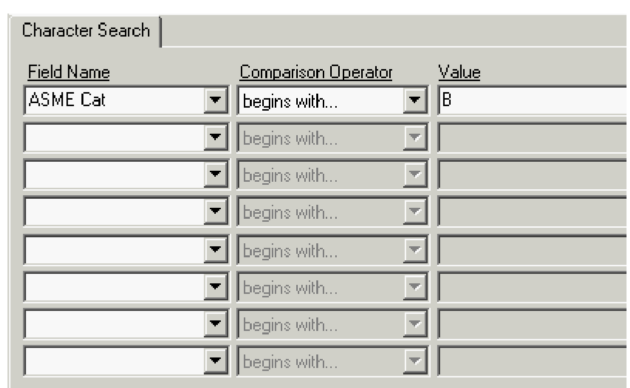


This region allows searching all or part of the Plan Status Grid for selected Status Codes. The codes to be searched for are entered in the field to the right. When searching for multiple codes, use commas to separate them (e.g. “X,P,C”).

The combo box on the left is for setting the search option, as follows.

- <u>Select All</u> – This option defines a "don't care" or "null" search.
- <u>Long Term Plan Contains...</u> – Use this option to search for the specified Status Code(s) anywhere within the Plan Status grid.
- <u>Current Interval Contains...</u> – Use this option to search for the specified Status Code(s) anywhere within the current Plan Interval.
- <u>Current Period Contains...</u> – Use this option to search for the specified Status Code(s) anywhere within the current Plan Period.
- <u>Current Outage Contains ...</u> – Use this option to search for the specified Status Code(s) for the current Outage.
- <u>Interval 1 Contains.../Interval 2 Contains.../ etc.</u> – Use this option to search for the specified Status Code(s) anywhere within the selected Plan Interval.

Character Search



ISI Filters support searches on up to 8 component record fields at one time.

A search is defined by selecting the field in the first combo box, selecting a search option in the second combo box, and then entering the search value in the third field.

The search options are described below. Note that each search option has a companion "negative image" choice which produces an "everything but" View.

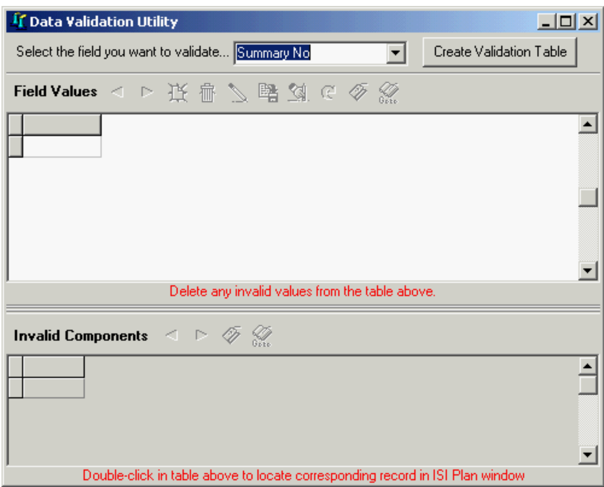
- is exact like.../is not exactly like... -- Use these options when you want to search for an exact *character-by-character* match between the field and the search text.
- begins with.../does not begin with... -- Use these options when you want to search for field entries which begin with the search text. For example, an NDE Method search with the search text "VT" would match field entries like: "VT-1", "VT-2", etc.
- contains.../does not contain... – Use these options when you want to search for field entries which contain the search text characters anywhere in the field. For example, a Cal Block search with "PTB" as the search text would match field entries like: "19-PTB", "38-PTB", etc.
- contains any of.../contains none of... – These options are similar to the contains... options above, except that the search text can contain multiple search items (separated by commas). For example, an NDE Method search with "VOL,SUR" as the search text would match field entries which contain either “VOL” or “SUR”, anywhere in the field text.
- is empty/is not empty -- These options are useful for locating missing or blank field entries. No search text is required.

Database Maintenance

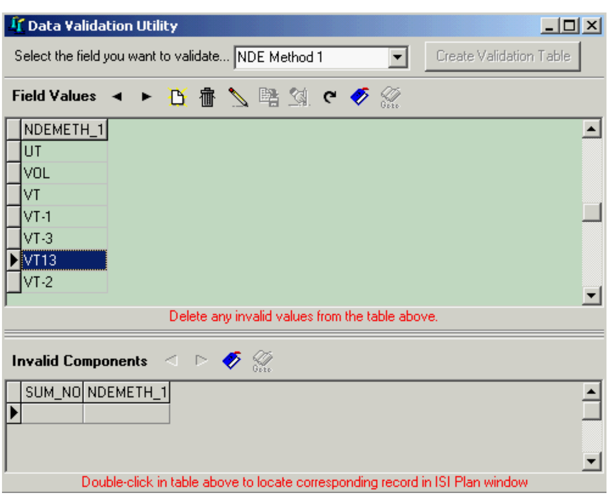
Validating Field Data

The Data Validation Utility provides a tool for rapidly locating and correcting invalid entries or typographic errors in any ISI Plan Component field.

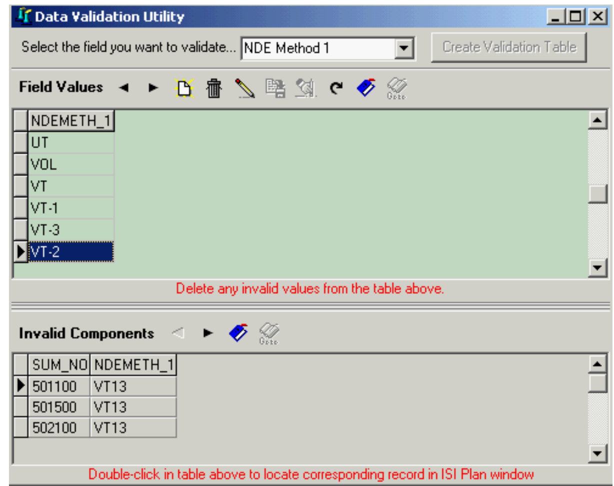
- If necessary, open the ISI Plan & Results Window.
- Select [Tools|Data Validation Utility...] from the pull-down menus at the top of the ISI Plan & Results Window, to open the validation utility window.



- Use the combo box at the top to select the field you want to validate.
- If a field validation table already exists, it will be displayed in the Field Values grid. If not, click the **Create Validation Table** button to create the table.



- Locate and delete any invalid Field Values. *Delete values by first selecting them, then clicking* . As invalid Field Values are deleted, the components containing invalid values in the field in question will be listed at the bottom of the dialog.



- To correct an invalid field value in a component record, double-click on the component in the Invalid Components list. The errant component will be located and displayed the ISI Plan & Results Window. Use normal editing procedures to correct the field value.

Modifying Data Using Global Scan & Replace

The Global Scan & Replace Utility combines the capabilities of the ISICalc language and WinISI’s filtering capabilities into a tool for performing batch modification ISI component records. With Global Scan you can...

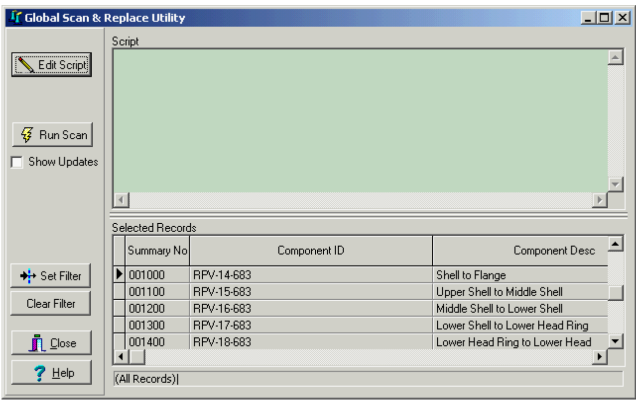
- automatically correct erroneous field entries,
- move data entries to from one field to another, and
- calculate and "fill-in" fields with new values.

Using Global Scan involves the following tasks:

- Make a current backup of your data! Modifications made using Global Scan cannot be "undone". The only recourse is to restore the database from a backup copy.
- Write a script (using the ISICalc language) which makes the desired changes to a single component record. This script will be executed once for each record in the scan.

- Optionally, set up a Filter to select the records to be scanned and modified. If you want to modify all of the component records, you can skip this step. *As an alternative to a filter, you can use conditional script statements (i.e. IF ... ENDIF) to conditionally modify records.*
- Run the scan to make the changes.

With the exception of making a backup, the entire process is performed from the Global Scan & Replace Dialog (shown below).



Detailed procedures for using Global Scan are given below, along with some examples. To learn more about how to write scripts see the ISICalc Tutorial and Language Reference (available on your installation CD or from the Polaris Microsystems web site).

Running a Scan

- Make a current backup. (see Backing Up Your Data below).
- If necessary, open the ISI Plan & Results Window.
- Open the Global Scan & Replace Dialog by selecting [Tools|Global Scan & Replace...] from the pull-down menus at the top of the ISI Plan & Results Window.
- Click the Edit Script button, or double-click anywhere within the script display area to open the script editor.
- Enter the desired script. (See the above-mentioned tutorial and reference information, and the examples below if necessary.)
- Click the button to verify the syntax of your script. Correct any syntax errors.
- Click the button to close the script editor. Your modified script will be displayed in the Global Scan & Replace Dialog.
- If a filter is required, click the Set Filter button to open the Global Scan Filter Dialog. Enter filter parameters as required to select the records you want to modify. When finished, click **OK** to return to the Global Scan dialog.
- Refer to the Selected Records list at the bottom of the window and verify that only the records you want to modify are listed.
- If you want Global Scan to update the display after each record is scanned (so you can track its progress), check the Show Updates check box. *Note: Selecting this option increases the time it will take to complete the scan.*
- Click the Run Scan button to start Global Scan. A progress dialog will be displayed during the scan. You can abort the scan at any time by clicking the **Abort** button.

Backing Up Your Data

To run a backup, all you need to do is to specify a name and location (drive and/or directory) for the backup file. The rest is automatic.

- Decide on the “destination” media (hard drive, zip disk, etc.) for the backup file. If you are backing up to removable media, take any steps necessary to prepare the media (e.g. formatting, etc.).
- Open the WinISI Database Manager by selecting [File|Database Manager...] from the menu in the main window.
- Click Backup Files. In the dialog box, select the destination in the Save In field, and set the desired name for the backup file in the File name field. *WinISI will remember the drive and file name you choose and will preset the fields accordingly the next time you run a backup.*
- Click OK to begin the backup. Before proceeding, WinISI will check to see if a backup file by the same name exists. If so, it will warn you of the overwrite and give you two chances to cancel.

Recovering From Data Loss

This section is intended as a guide for rebuilding or restoring lost or damaged WinISI data files. If your data files become damaged or are erased, review the recovery steps discussed below before doing anything. If you have any questions or doubts about the recovery process, call for assistance before proceeding.

Rebuilding Damaged Data Files

This should be first recovery step taken when one or more of the WinISI data files is damaged.

- Open the WinISI Database Manager by selecting [File|Database Manager...] from the menu in the main window.
- Click [Check Files] to begin the recovery operation. If Check Files is able to successfully rebuild all damaged files, close the Database Manager and take steps to visually verify that all data is present. If data is missing, or if the Check Files function fails, you will need to restore files from the most recent backup (see below).

Restoring Data Files From Backup

Use this procedure when one or more of the WinISI data files is damaged and the rebuild operation failed, or if one or more data files are inadvertently deleted.

> WARNING! The Restore From Backup function will wipe out ALL of the WinISI data on your system, and replace it with the data on the Backup. Any changes or additions since the backup was created will be lost!

> WARNING! Do NOT use the Restore From Backup function to Merge or Synchronize data between two machines!

> Do NOT restore data to the same directory where your damaged data resides. Always restore to a new directory.

> Due to the complicated links between the individual data files which make up a WinISI database, restoration of individual files is not allowed. You must restore all files, if you are going to restore any of them.

- Open the WinISI Database Manager by selecting [File|Database Manager...] from the menu in the main window.
- Specify a new data folder by typing the full destination data path into the Data Path field.
- If necessary, mount the removable media from which you want to restore.
- Click [Restore From Backup]. The data manager will confirm that you want to create the new directory. Click **Yes**.
- Proceed past the "warning" dialog by clicking OK. The "Restore files from..." dialog will be displayed. Locate and open the WinISI backup file you are restoring from. Opening the file will initiate the restore operation.
- When the restore is complete, the Data Manager will "ask" if you want to run the Check Files and Reindex & Pack functions. Answer yes to both.

Relocating Data Files

Creating empty files in a new or existing folder.

- If data files are to be stored in an existing folder, first insure that the folder is empty. If not, erase any files and sub-folders using Windows Explorer™.
- Start WinISI then open the WinISI Database Manager by selecting [File|Database Manager...] from the menu in the main window.
- To create a new folder, type the full data path into the Data Path field then press the <Tab> key. WinISI will confirm that you want to create the new directory. Click **Yes**. To select an existing folder, click the ellipsis button to the right of the Data Path field then select the desired folder from the Browse For Folder dialog.
- Once the path to the desired folder is shown in the Data Path field, Click **OK** to close the Data File Location dialog. WinISI will automatically create and initialize empty data files.

Moving data files to a new or existing folder.

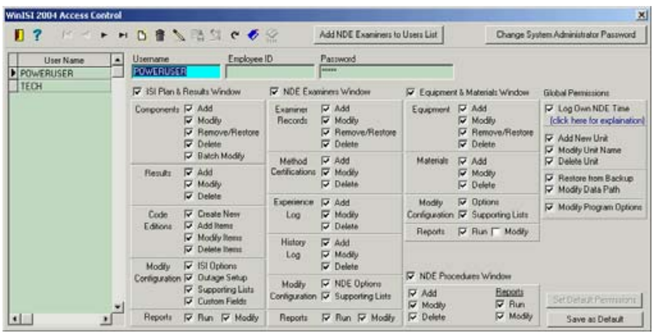
- If data files are to be moved to an existing folder, first insure that the destination folder is empty. If not, erase any files or sub-folders using Windows Explorer™.
- Start WinISI then open the WinISI Database Manager by selecting [File|Database Manager...] from the menu in the main window.

- Click Backup Files and make a backup copy of your data. (See Backing Up Your Data, above.)
- If moving files to a new folder, type the full data path into the Data Path field. If moving files to an existing folder, click the ... button to the right of the Data Path field then select the desired folder from the Browse For Folder dialog.
- Click Restore From Backup to restore the data from the backup you just created. (See Restoring Data Files From Backup, above.)

Access Control Utility

Overview

WinISI Access allows you to establish a list of "users" and assign specific permissions to each. Users are added to the list and permissions are set using the *WinISI Access* program.



At the top of the window is the main command bar with buttons for moving through the users list, adding new users, etc. Just below the command bar on the left is a tabular display of users. The "selected" user is indicated by the triangular pointer. The selected user's information is displayed in the fields to the right of the list. Permissions are set by manipulating these fields.

Fields

- Username – This field displays the unique username assigned to the individual. This is the name the person will use when logging in to WinISI. Usually the person's last name is used, though in cases where there are two users with the same last name, a modified last name will need to be used to avoid duplication.

  ☞ The Username field is set when the user is added to the list. Once added, the username can only be changed by deleting then re-adding the user.

- Employee ID – This field is used within WinISI to determine if a user is attempting to modifying his or her own NDE Qualification records. Therefore, if the user is an NDE Examiner, this field should be set to match the Employee ID assigned to examiner in the *NDE Examiner* window. *This field is read only. To modify it, first double-click on the field box.*

  ☞ The Employee ID field is automatically initialized when the Add NDE Examiners to Users List function is used.

- Password -- This is the log-on password for the user. Passwords are masked from view until the user record is placed in edit mode by clicking the Edit button in the command bar. Initial passwords should be assigned by the System Administrator and given to each user.

  ☞ Users can change their password from with WinISI by selecting [File|Change User Password...] from the main menu.

ISI Plan & Results Permissions

The primary permission checkbox (ISI Plan & Results Window) grants the user permission to open the *ISI Plan & Results* window. *This permission must be granted in order for the permissions below to be effective.*

- Components – These permissions control manipulation of the primary component records and information fields. Granting Batch Modify permission allows the user to run the *Reorganize Plan Database* or *Global Scan & Replace* utilities.
- Results – These permissions control manipulation of outage results records including the results indications and datasheets.
- Code Editions – These permissions control manipulation of the Code Edition database.
- Modify Configuration – These permissions control manipulation of supporting list and other customization and configuration settings.
- Reports – Controls access to reports. Granting Modify permission allows the user to create and/or edit report templates.

NDE Examiners Permissions

The primary permission checkbox (NDE Examiners Window) grants the user permission to open the *NDE Examiners* window. *This permission must be granted in order for the permissions below to be effective.*

- Examiner Records – These permissions control manipulation of the primary examiner records and information fields.
- Method Certifications – These permissions control manipulation of NDE method certification records including test dates, grades and PDI certs.

- Experience Log – These permissions control manipulation of records in the Experience Log.
- History Log – These permissions control direct manipulation of records in the History Log. *Note – The automatic creation of History records by WinISI is not affected by these settings.*
- Modify Configuration – These permissions control manipulation of supporting list and other customization and configuration settings.
- Reports – Controls access to reports. Granting Modify permission allows the user to create and/or edit report templates.

Equipment & Materials Permissions

The primary permission checkbox (Equipment & Materials Window) grants the user permission to open the *Equipment & Materials* window. *This permission must be granted in order for the permissions below to apply.*

- Equipment – These permissions control manipulation of NDE equipment records and information fields.
- Materials – These permissions control manipulation of NDE material records and information fields.
- Modify Configuration – These permissions control manipulation of supporting list and other customization and configuration settings.
- Reports – Controls access to reports. Granting Modify permission allows the user to create and/or edit report templates.

NDE Procedures Permissions

The primary permission checkbox (NDE Procedures Window) grants the user permission to open the *NDE Procedures* window.

Global Permissions

- Modify Program Options -- Allows the user to open the Program Options dialog and change the settings contained therein.
- Restore From Backup -- Allows user restore data files from a backup disk set. *WARNING -- A user granted this permission will be able to completely replace all existing data in the WinISI database, potentially destroying it.*
- Modify Data Path -- Allows the user to alter the directory path to the WinISI data files.

Buttons

- **Save as Default** -- Click this button to make the displayed permissions the "default" setting. The default permissions are automatically assigned when a new user is added to the list or when the **Set Default Permissions** button is clicked.
- **Set Default Permissions** -- Click this button to assign the default permissions to the currently selected user. The user record must be in edit mode in order for this button to be active.
- **Add NDE Examiners to Users List** -- This function scans the WinISI database and adds new NDE Examiners to the user list. The program uses the employee ID to determine if an Examiner is already in the list.
- **Change System Administration Password** -- Use this function to change the password which allows entry into WinISI Access.