Polaris Microsystems, LLC

WinISI 2011

Quick Start Guide
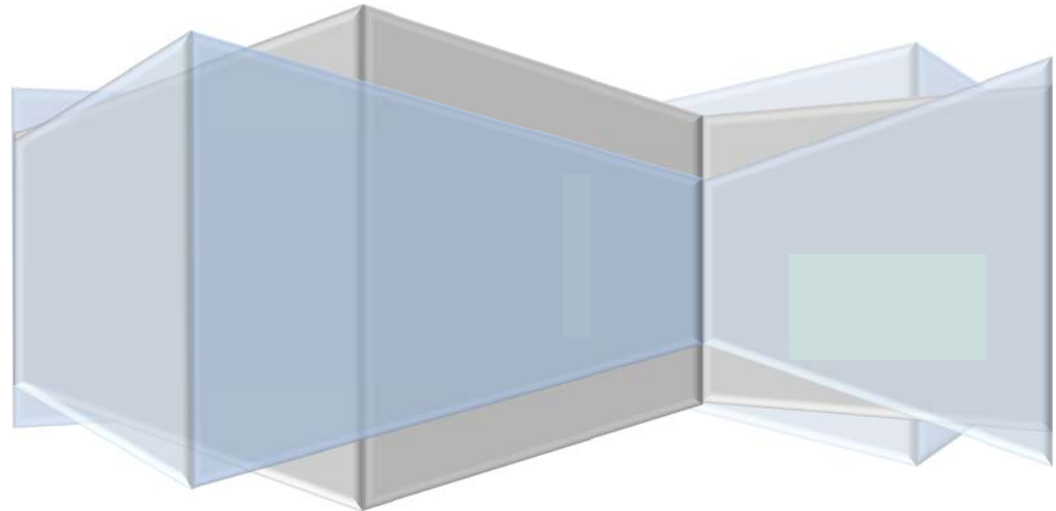
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Editing a Document Type

- Select the record in the list, then click at the top of the window.
- Modify the Code and Description as desired.
- Click to save the changes, or...
- To cancel all changes to the record, click .

Deleting a Document Type

CAUTION: Deleting a record permanently erases it from the database.

- Locate the record you wish to delete (see above).
- Click .

Deleting a Document

CAUTION: Deleting a document record permanently erase the record from the database. The internal document file is also deleted from the Documents folder.

- Locate the record you wish to delete (see above).

- Click .

Grouping Documents by Type

Documents can optionally be sub-divided into any number of user-defined groups, or "Document Types". The document type acts like a "tag" which can be utilized to filter the list of documents so that only certain types are visible. This can aid in locating a document record.

Opening the Document Type Editor

Document Types are managed via the Document Type editor.

- To open this editor, pull down the *Configuration* menu at the top of the Documents window, and select *Document Types…*
- To close the editor, click **OK** button at the bottom.

Defining a new Document Type

- Click at the bottom of the window to create a new blank record.
- Enter a **unique** three-character document type Code, and a Description for the new record. It is suggested that you utilize descriptive Codes. For example: "ISO", "PID", "DWG" etc.
- Click to save the new record, or…
- To discard the new record, click .

Adding a new Document

IMPORTANT: When a document file is added, WinISI creates a duplicate copy of the original document file, renames it with an internal unique name, and places it in the Documents sub-folder inside the current data path. The original document file is not moved or altered in any way.

- Click at the top of the window. A Windows Open File dialog box will be displayed.
- Locate the document file you want to add. You can change the "Files of type:" setting to filter for the desired document type. (The default type is "Adobe Acrobat (PDF)".) When the file is located, double-click on it.
- A second dialog box will be displayed, requesting entry of a Document Number. Enter the desired number then click **Ok** to add the document.
- The new document record will appear in the list and will be placed in "edit" mode. At this point, you can use the fields on the right side of the window to enter a Document Title, set the Document Type, or add Notes.

  When finished making these entries, click to save the changes.

Editing Document Fields

IMPORTANT: You can only edit the Document Number, Document Title, Document Type and Notes field. WinISI does not incorporate built-in tools for editing the document itself.

- Locate the desired document record (see above).
- Click at the top of the window.
- Modify the information in the fields located on the right side of the screen as desired.
- Click to save the changes, or...
- To cancel all changes to the record, click .

Working with Documents

WinISI includes a database for cataloging document files stored in several common formats, including:

- Adobe Acrobat (PDF)
- Tagged Image File Format (TIFF)
- Microsoft Word (DOC, DOCX)

Documents are identified by a Document Number which is entered when you add the document. You can utilize your existing numbering system, or create a new one. It is suggested that you use unique Document Numbers, however WinISI will allow duplicate numbers to be assigned.

All functions for maintaining the document catalog are accessed from the Documents window. To open this window, click the **Docs** button in the main window.

Using the Document Catalog

Locating a Document

- If you have grouped your documents by Document Type, click on the appropriate document type tag, located at the bottom of the Documents window, below the list. If you don't know the type (or are not grouping your documents) select the (All Documents) tab.
- If necessary, use the vertical scroll to scroll the list to the left and locate the desired document. Documents are listed in alpha-numeric order by Document Number.

Viewing (Opening) a Document

NOTE: WinISI does not include built-in tools for opening and viewing documents. Instead, it passes along a request to the Windows operating system to open the selected document file, much like what happens when you double-click on a document file from the Windows desktop. If the appropriate software for viewing a document (e.g. Adobe Acrobat Reader, etc.) is not installed, the request will fail.

- Locate the desired document record (see above).
- At the top right-hand corner of the window (next to Document File), click 📂. This will open the document in a separate window.

Editing a Procedure

- Locate the record (see above).

- Click at the top of the window.

- Modify the information in the fields located on the right side of the screen as desired.

- Click to save the changes, or...

- To cancel all changes to the record, click .

Deleting a Procedure

CAUTION: Deleting a record permanently erases it from the database.

- Locate the record you wish to delete (see above).

- Click .

Installing WinISI 2011

Installing the Program

Insert the WinISI 2011 CD into your computer's CD ROM drive. The CD will auto-start and display the CD window. If the CD does not auto-start, select *Start>Run...* to open the Run dialog. Click **Browse** and locate CDROM.EXE on the CD drive. With this file selected in the Run dialog box, click **OK**.

When the CD window appears, click on **Client Setup** to begin the install. Step through the install screens. If you are unsure about the install options presented on a screen, accept the preset options and click **Next >** to proceed to the next screen. When you get to the last screen, click **Finish** to complete the installation.

Starting WinISI 2011

- Double click the **WinISI 2011** icon on the desktop to start the program. The WinISI Login dialog will be displayed.

- Login using your Username and Password (see above). The default user name is "POWERUSER" with a password of "POWER".

Setting up User Accounts

When first installed, WinISI creates a default user with a user name of "POWERUSER" and a password of "POWER". This user has permission to perform ALL functions in WinISI.   Most likely, you will want to create your own user accounts and set appropriate permissions for each. To do this...

- Start WinISI (see above) and log-in using the "POWERUSER" username.

- In the main window, pull down the *Configuration* menu and select *Manage User Accounts...*

- Enter the System Administrator Password into the dialog box then click **OK.** (The default password is "MASTERKEY".) The User Account Manager window will be displayed.

To create a new user...

- Click in the command bar at the top of the window.

- Enter a unique user name into the dialog box then click OK.

- If "default" permissions have been set, a dialog box will appear asking you to confirm assigning these permissions to the new user. Click **OK** or **Cancel** as desired.

- Click to edit the new record. Change the Password if desired, and assign the appropriate permissions by altering the check boxes.

- Save the record by clicking .

What Now?

The remainder of this guide contains basic procedures for navigating the program. For additional assistance, contact True North Consulting, LLC.

http://www.tnorthconsulting.com/

Working with NDE Procedure Records

WinISI includes a database for recording pertinent information about NDE Procedures, including...

- Procedure Number
- Method
- Issued and Effective Date
- Last Revision number and Date
- Title and number of pages.

All functions for maintaining these records are accessed from the NDE Procedures window. To open this window, click the **NDE Proc.** button in the main window

Locating a Procedure

- If necessary, use the vertical scroll to scroll the list to the left and locate the desired Procedure. Procedures are listed in alpha-numeric order by Procedure Number.

Adding a new Procedure

- Click at the top of the window to create a new blank record.
- Enter the appropriate information for the new record in the fields located on the right side of the screen. At minimum, you should complete the Procedure Number and Method fields.
- Click to save the new record, or...
- To discard the new record, click .

Deleting a Cal Block Record

CAUTION: Deleting a record permanently erases it from the database.

- Locate the record you wish to delete (see above).

- Click .

Working with ISI Components

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.

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 Plan 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.
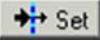
 To set a filter...

- Click the ⊹ Set 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 .

Calibration Blocks

Calibration Block records can be viewed and modified by selecting the Cal Blocks tab located at top of the Equipment & Materials window, just below the button bar.

Locating a Cal Block Record

- Click on the Cal Blocks tab, located just below the button bar.
- If necessary, use the vertical scroll to scroll the list to the left and locate the desired Cal Block record.

Adding a new Cal Block Record

- Click on the Cal Blocks tab, located just below the button bar
- Click at the top of the window to create a new blank record.
- Enter the appropriate information for the new record in the fields located on the right side of the screen. At minimum, you should complete the Block # and Fabrication No. fields.
- Click to save the new record, or...
- To discard the new record, click .

Editing a Cal Block Record

- Locate the record (see above).
- Click at the top of the window.
- Modify the information in the fields located on the right side of the screen as desired.
- Click to save the changes, or...
- To cancel all changes to the record, click .

- Click at the top of the window to create a new blank record.
- Enter the appropriate information for the new record in the fields located on the right side of the screen. At minimum, you should complete the Batch # and Type fields.
- Click to save the new record, or...
- To discard the new record, click .

Editing a Materials Record

- Locate the record (see above).
- Click at the top of the window.
- Modify the information in the fields located on the right side of the screen as desired.
- Click to save the changes, or...
- To cancel all changes to the record, click .

Deleting a Materials Record

CAUTION: Deleting a record permanently erases it from the database.

- Locate the record you wish to delete (see above).
- Click .

"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 Outage combo box near the top of the window, or...
- Double-click on the desired outage in the Plan Status 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 .

Deleting an Equipment Record

CAUTION: Deleting a record permanently erases it from the database.

- *Locate the record you wish to delete (see above).*

- Click .

Materials Records

Materials records can be viewed and modified by selecting the <u>Materials</u> tab located at top of the <u>Equipment & Materials</u> window, just below the button bar.

Materials can be grouped into any number of types as necessary or desired. WinISI installs with a number of pre-defined types, including...

- Cleaner
- Couplant
- Developer
- Demineralized Water (Demin Water)
- Mag Fluid
- Mag Powder
- Penetrant
- Remover

New types can be defined via the *Configuration* pull-down menu.

Locating a Materials Record
- Click on the <u>Materials</u> tab, located just below the button bar
- Select the materials type by clicking on the appropriate type tab at the bottom of the window.
- If necessary, use the vertical scroll bar to scroll the list to the left and locate the Materials Record.

Adding a new Materials Record
- Click on the <u>Materials</u> tab, located just below the button bar
- Select a Type for the new record by clicking on the appropriate tab at the bottom of the window.

Locating an Equipment Record

- Click on the <u>Equipment</u> tab, located just below the button bar
- Select the equipment type by clicking on the appropriate type tab at the bottom of the window.
- If necessary, use the vertical scroll bar to scroll the list to the left and locate the Equipment Record.

Adding a new Equipment Record

- Click on the <u>Equipment</u> tab, located just below the button bar
- Select a Type for the new record by clicking on the appropriate tab at the bottom of the window.
- Click [icon] at the top of the window to create a new blank record.
- Enter the appropriate information for the new record in the fields located on the right side of the screen. At minimum, you should complete the Serial # and Type fields.
- Click [icon] to save the new record, or...
- To discard the new record, click [icon].

Editing an Equipment Record

- Locate the record (see above).
- Click [icon] at the top of the window.
- Modify the information in the fields located on the right side of the screen as desired.
- Click [icon] to save the changes, or...
- To cancel all changes to the record, click [icon].

Configuring Plan Parameters

Setting Outage Information

- Select <u>Outage Setup...</u> from the <u>Configuration</u> menu.
- Edit the outage list as necessary, making entries in the <u>Outage #</u> column, and optionally the <u>Year</u> 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 <u>Status Code Definitions...</u> from the <u>Configuration</u> menu.
- Edit the list, making entries in the <u>Status</u>, <u>Description</u>, <u>Type</u> and <u>Count</u> columns.   *A check mark in the Count column indicates that the code is counted toward Section XI percentage requirements.*

Entering Results

Results records are accessible from Outage Results tab in the plan 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 store 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 <u>right</u> 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 <u>Results</u> menu and select *Carry Over Incomplete Exams...*

Select the "destination" Outage in the pop-up dialog then click **Ok**.

Working with Equipment & Materials Records

WinISI includes a database for tracking and recording pertinent information about…

- NDE testing <u>Equipment</u>
- <u>Materials</u> and other consumables used during NDE examination, and
- <u>Calibration Blocks</u>.

All functions for maintaining these records are accessed from the <u>NDE Equipment & Materials</u> window. To open this window, click the **Equip & Materials** button in the main window

Equipment Records

Equipment records can be viewed and modified by selecting the <u>Equipment</u> tab located at top of the <u>Equipment & Materials</u> window, just below the button bar.

Equipment can be grouped into any number of types as necessary or desired. WinISI installs with a number of pre-defined types, including...

- Thickness Standard
- Densitometer
- Density Stepwedge
- Eddy Current Tester
- Light Sensor UV
- Light Sensor White
- Light Meter
- MT Instrument
- MT Yoke
- Transducer
- UT Instrument

New types can be defined via the *Configuration* pull-down menu.

Working with Examiner Qualification Records

All Examiner Qualification functions within WinISI are accessed from the <u>NDE Examiner Record</u> 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.
- 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.