

Polaris Microsystems, LLC

WinIST 10

Quick Start Guide

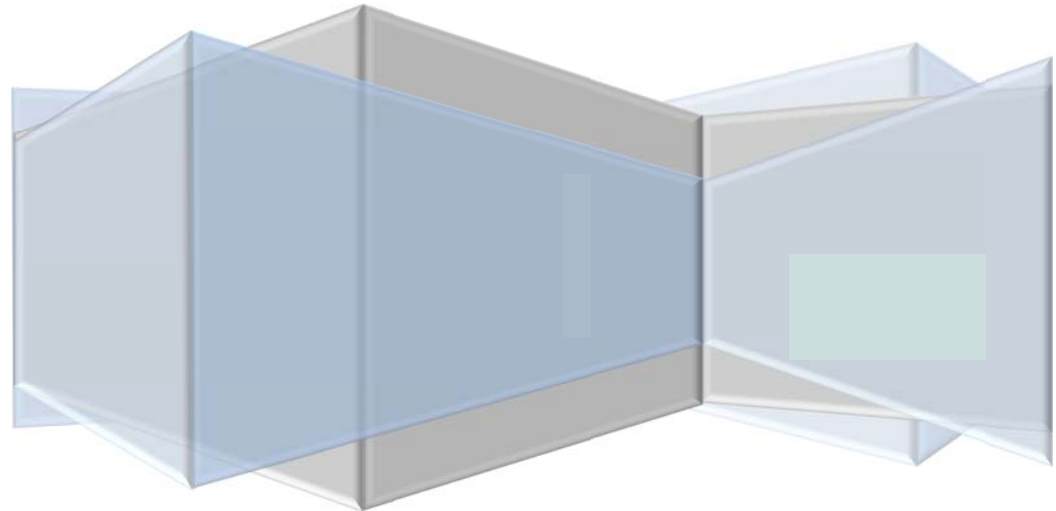


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Printing Reports

WinIST contains a library of several standard report templates. These include the following:

- Component Reports: Pump Listing and Valve Listing
- Status Reports: Pump Status and Valve Status
- Test Results Reports: Pump Test Results, Valve Test Results, and Test Results by Surveillance
- Test Scheduling Report

Reports are selected and printed via the Reports pull-down menu located at the top of the Components window.

NOTE: New custom report templates can be added to WinIST. If you need a custom report, contact Polaris Microsystems for support.

NOTE: Reports are initially displayed in a preview window on the screen. You can print the report to a hard-copy device using the print button located at the top of the preview window.

To print a report...

- Open the Components window, and then pull down the Reports menu. Select the desired report from the menu. The report setup dialog will be displayed.
- Use the setup dialog to specify any optional filtering you desire. The filter options are located in the lower portion of the dialog and will vary according to the type of report being printed.
- If desired, you can alter the report Title, Date and Revision options.
- When ready, click the **Run Report** button

Plotting Selected Component Exams

- Pull down the **Trending** menu in the main window, and then select **Plot selected Component Exams**. A dialog will be displayed showing all numeric component exams in the WinIST system.
- Select one or more Component Exam to be plotted using the Selection Options shown above the list.
- By default, the most recent [N] data points will be plotted for each exam. To alter [N], or to change other plotting options, click the **Edit Plot Options** button.
- When ready, click the **Plot Selected Exams** button.

Plotting Selected Surveillance Procedures

NOTE: This option produces a package containing plots for all component exams contained in the selected Surveillance procedure(s).

- Pull down the **Trending** menu in the main window, and then select **Plot selected Surveillances**. A dialog will be displayed a list of all the defined Surveillance Procedures in the WinIST system.
- Select one or more Surveillances to be plotted using the Selection Options shown above the list.
- By default, the most recent [N] data points will be plotted for each exam. To alter [N], or to change other plotting options, click the **Edit Plot Options** button.
- When ready, click the **Plot Selected Surveillances** button.

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Producing Trend Plots

Trend plots can be produced for any examination (Exam Code) which records Numeric results. Pass/Fail examinations cannot be plotted.

NOTE: Plots are initially displayed in a multi-page preview window on the screen. You can print plots to a hard-copy device using the print button located in the upper left-hand corner of the preview window.

Plotting an Individual Component Exam

- Open the Components window and locate the desired component.
- Select the desired Exam Code in the Examinations Performed list.
- Pull down the **Trend** menu at the top of the window, and select **Plot Exam[...]**. A dialog will be displayed with the 50 most recent test points pre-selected.
- If desired, alter the selected test points using one or more of the Selection Options shown above the list.
- To view or change plotting options, click the **Edit Plot Options** button.
- When ready, click the **Plot Selected Tests** button.

Plotting Selected Exams for an Individual Component

- Open the Components window and locate the desired component.
- Pull down the **Trend** menu at the top of the window, and select **Plot selected Exams...** A dialog will be displayed showing all numeric exams for the selected component.
- Select one or more Exam Codes to be plotted using the Selection Options shown above the list.
- By default, the most recent [N] data points will be plotted for each exam. To alter [N], or to change other plotting options, click the **Edit Plot Options** button.
- When ready, click the **Plot Selected Exams** button.

Installing WinIST 10

Installing the Program

Insert the WinIST 10 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 CDRM.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 WinIST 10

- Double click the **WinIST 10** icon on the desktop to start the program. The WinIST 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, WinIST creates a default user with a user name of "POWERUSER" and a password of "POWER". This user has permission to perform ALL functions in WinIST. Most likely, you will want to create your own user accounts and set appropriate permissions for each. To do this...

- Start WinIST (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. Product support is provided for clients with a current Maintenance and Update contract. See Getting Assistance below.

Getting Assistance

To send a support request, select the **Customer Support...** option in the Help menu located in the main window. You can also send a direct email to the address shown below.

Email: jimnorth1@polaris-microsystems.com

Printing a Data Sheet

Logged Data Sheets can be printed, if desired. WinIST includes a standard report template for printing a data sheet. This can be customized if necessary. Contact Polaris Microsystems regarding a custom template.

- Locate and select the desired *Logged* data sheet (see above)
- To print the sheet using the default template, click the **Print Data Sheet** button located at the top of the window.
- To select an alternate template, right-click the **Print Data Sheet** button.

Deleting a Data Sheet

Logged data sheets can be saved for as long as desired. WinIST can store any number of logged sheets. By saving logged data sheets, you retain the option of re-printing older sheets at any time.

CAUTION: If you delete a logged data sheet, you will forfeit the option to print it...forever!

- Locate the data sheet you wish to delete (see above).
- Pull down the **Data Sheets** menu, and then select **Delete...**

Locating an existing Data Sheet

- Select the appropriate View (Open Data Sheets, or Logged Data Sheets) using the view selector in the upper right-hand corner of the window.
- Locate the desired Sheet number or Surveillance number in the list on the left. Use the list scroll bar if necessary. Then, click once on it to select it.

Filling Out a Data Sheet

A data entry form is display for each Step in the Data Sheet. If necessary, you can use the scroll bar on the right side of the steps to see all the steps of a long data sheet. To fill out the form, simply enter values for each step. Here are some important notes...

- For numeric tests, enter the numeric result into the Value field. For Pass/Fail tests, you can enter a “P” to indicate the test passed. Anything other than a “P” will be interpreted as a test fail.
- You can optionally enter Remarks, modify the Date, or specify a test result as a Baseline test, if applicable.
- As you select each step, the results of last test, the reference value, and acceptance criterion for that examination is shown below. This helps to identify anomalous results during the entry phase.
- If the result entered into the Value field is outside of the acceptance limits, the field will be highlighted with a red background.
- Normally, entries are automatically saved as you move through the list of steps. However, you can cancel changes to a step by using the navigation bar located to the right of the list.
- If there is no test data for a step (the test was not performed), just leave the Value field blank for that step.

Logging a Data Sheet

When the data sheet has been filled out, and you are ready to “log” the sheet and post the results the Components database...

- Locate and select the Data Sheet (see above)
- Click the **Log Data Sheet** button located at the top of the window.

Defining Examination Codes

In the WinIST system, all in-service testing (IST) of components is based on a system of user-defined Examination Codes. An Exam Code encapsulates parameters which define how you want WinIST to handle and interpret an IST examination and its data. In particular, an Exam Code allows you to specify the following:

- A descriptive Name for the Exam (e.g. “Stroke Time – Closed”)
- The type of component (Pump or Valve) to which the Exam applies
- The type of data collected (Exam Type), either Numeric or Pass/Fail,
- The Reference Type (Constant, Baseline or Floating), if any, used as a basis for determining acceptance limits on the test data.
- Default parameters for calculating the acceptance limits (Upper Required, Upper Alert, Lower Alert, Lower Required) for test data.
- Various parameters for labeling test input sheets (Data Entry Prompt, Units) and trend plots (Y-Axis Title, etc.)
- Optional default testing frequency.

Once an Exam Code is defined, it can be assigned to any number of components of the proper type (Pump or Valve). This can be done, one at a time, to individual components via the Components window. Alternatively, you select a block of components and bulk-assign an Exam Code to them. Procedures for each of these methods are described below.

Working with Exam Codes




Exam Codes are managed via the IST Examination Code Definitions window. To open this window, click the **Exam Code Definitions** button in the main window.

The window contains two “tabs”, Pump Codes and Valve Codes, which serve to segregate codes for each type of component. Within each tab, existing codes are shown in a tabular list on the left. Edit fields for modifying details about the *selected code* are displayed on the right. The currently-selected Exam Code is marked with a black triangle in the list.




Locating and Selecting an Exam Code

- Select the appropriate tab: Pump Codes or Valve Codes.
- If necessary, use the list scroll bar to find desired Exam Code, and then click once on it to select it. Details will be displayed to the right.

Editing an Exam Code


- Locate the Exam Code to be modified (see above).
- Click  in the command bar 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 .

Adding a new Exam Code

- Select the tab appropriate for the type of code (pump or valve) you want to create.
- Click  in the command bar at the top of the window.
- Modify the record field(s) as necessary.
- Click  to save the changes, or...
- To cancel and discard the new record, click .

Deleting an Exam Code

NOTE: Only Exam Codes which have not been assigned to a Component, Surveillance or Test Data Sheet can be deleted. Codes which are "in use" cannot be deleted.

- Locate and select the code you wish to delete (see above).
- Click  in the command bar at the top of the window.

Entering Test Results


Inservice test results are entered into WinIST via customized entry forms called Data Sheets. Data Sheet forms are built by WinIST, and correspond to Surveillance procedure definitions (see Defining Surveillances, above). *Therefore, you will need to define and enter at least one Surveillance procedure before you can enter test results into WinIST.*

Data Sheets are created, filled out (with test results), and "logged" via the [Data Sheets](#) window. To open this window, click the **Enter & Log Data Sheets** button in the main window.

Existing data sheets are shown in a tabular list on the left. This list shows either Open (un-logged) or logged data sheets, depending on the View selected (see below). The data entry form for the *selected* data sheet is displayed on the right. The currently-selected Data sheet is marked with a black triangle in the list.

Working with Data Sheets

Creating a Data Sheet


- Click  in the command bar at the top of the window. The Append Data Sheet dialog will be displayed.
- Use the drop down control to select the desired Surveillance procedure.
- Enter the date the test(s) were performed in the Test Date field. Note that you can change the test date for individual steps later, when filling out the form, so enter the date which applies to the majority of the steps.
- If necessary, you can change the revision number and revision date for the selected Surveillance. Use the navigator buttons *located to the right of the revision fields* to edit the fields and save the changes.
- Optionally enter Remarks. Remarks entered here will be inserted into the Remarks field for each and every step. You can modify remarks for each step later, when filling out the form.
- Click the **Ok** button to build the new data sheet, or click the **Cancel** button to discard the new sheet.

Assigning Exam Codes to Components

NOTE: Exam Codes can also be assigned one-by-one to components via the Components Window.

- Locate and select the code you wish to assign (see above).
- Click the **Add Exam to Selected Components** button in the command bar at the top of the window. A pop-up dialog box will be displayed showing a list of “candidate” components.
- Select one or more components for the assignment. Selection instructions shown in the dialog box give several options.
- Click the **Go** button to proceed and make the assignments.

Adding a new Surveillance

- Click  in the command bar at the top of the window.
- Refer to *Editing a Surveillance* and *Modifying Surveillance Steps* (above) for instructions on how to complete and save the new definition.

Deleting a Surveillance

NOTE: Before a Surveillance procedure can be deleted, any open Data Sheets must either be deleted or Logged. See Entering Test Results for instructions on how to manage Data Sheets.




- Locate and select the surveillance number wish to delete (see above).
- Pull down the Surveillance menu (at the top of the window) and select **Delete...**

Locating and Selecting a Surveillance





- If you know the Surveillance number, begin typing it in the search box located above the list. As you type, surveillances matching your entry will be shown in the list. Once you see the surveillance you are looking for, click on it to select it.
- If you don't know the number, use the list scroll bar to search the list for the desired surveillance, and then click once on it to select it.

Editing a Surveillance

NOTE: To modify the Steps for a surveillance procedure, see Modifying Surveillance Steps below.

- Locate the Surveillance to be modified (see above).
- Click  in the command bar 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 .

Modifying Surveillance Steps

- Locate the Surveillance to be modified (see above).
- To add a new step, click  in the command bar to the left of the step list, or...
- To modify an existing step, click  in the command bar to the left of the step list
- Modify the step fields as necessary. Click the ellipsis button in the Description column to pop up a dialog where you can select a component and examination for the test.
- Click  to save the changes, or...
- To cancel the changes, click .

Working with IST Components


All information related to specific pump and valve IST components are accessed from the IST Components window. To open this window, click the **IST Components** button in the main window.

The IST Components window contains two "tabs". The Component Info tab includes static fields describing the component. The Trending tab includes examination limitations and test results history for the component. The tabs are located just below the component number field near the top of the 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 Views



Locate the View combo box in the top left-hand region of the components window, just below the menu bar. To change the view, drop down the list and select the desired view. The available views are...

- Pump Components – Pump components are visible and can be searched.
- Valve Components - Valve components are visible and can be searched.

- Removed - Only components which have been Removed from Service are visible.



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 Component (pump or valve) number.
- Enter an ID 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...

Defining Surveillances

WinIST supports grouping of several IST examinations into “surveillance” procedures. Any number of Surveillance Procedures can be defined and stored in the system.

Within the WinIST software system, a Surveillance procedure can be used to generate a custom test results entry form for streamlining results entry. A Surveillance procedure can also be used to “package” reports and trend plots associated with a procedure.


A Surveillance definition consists of the following:

- A unique Surveillance Number which serves as the key identifier for the surveillance.
- The Name of the surveillance procedure (e.g. “Relief Valve Tests”)
- Revision information (number and date).
- A text Description of the surveillance procedure.
- A list of procedure steps. Each step specifies a step number, a component to be tested, and the examination (Exam Code) to be performed. Steps can be ordered independently of the step number assigned.

Working with Surveillances

Surveillance procedures are managed via the Surveillance Definitions window. To open this window, click the **Surveillance Definitions** button in the main window.

Existing surveillance procedures are shown in a tabular list on the left. Edit fields for modifying details about the *selected surveillance* are displayed on the right. The currently-selected Surveillance is marked with a black triangle in the list.

- To cancel the changes made to the displayed record, click .

Removing & Deleting Components

Removing a Component from Service

“Removed” components remain in the database, but are excluded from the various IST 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 .

Component Examinations

Examinations Display

The examinations assigned to (performed on) a component are shown in the top section of the Trending tab. The examinations are listed on the left side and can be selected by clicking. A black triangle marks the selected examination.

Detailed information about the selected exam is shown to the right of the list. These include baseline information, acceptance criteria limits, last test, last exception and current status information.

A navigation control bar is displayed vertically to the left of the examination list, providing add, update and delete functions specifically for the examinations list. These functions are discussed in the procedures below.


Test Results Display

The historical test results for the selected examination are shown in the lower portion of the Trending tab. Individual test points are listed on the left and can be selected by clicking. A black triangle marks the selected test point.

Details about the selected test point are shown to the right of the list. These include the test date, measured value, acceptance limits applied to the test, the status of the test point, test procedure information and remarks.




A navigation control bar is displayed vertically to the left of the test results history list, providing functions for updating and deleting test points shown in the list. These functions are discussed in the procedures below.

Assigning an Examination to a Component

- Click  in the command bar to the left of the Examinations Performed list. A dialog box will appear with a drop-down list of possible exam codes.
- Select the desired Exam Code, and then click **OK**. The new code will be added to the list.


- Follow the Editing an Examination procedure below, to edit the new examination.

Editing an Examination




- Select the Exam Code to be modified and click on it to select it.
- Click  in the command bar to the left of the list.
- Modify the record field(s) as necessary.
- Click  to save the changes, or...
- To cancel the changes made to the displayed record, click .

Deleting an Examination


CAUTION: Deleting an examination permanently erases it from the database. All associated test results if any, are also permanently erased.

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

Editing a Test Point

- Select the appropriate Exam Code in the Examinations Performed list.
- Locate the test point in the Test Results list and click to select it.
- Click  in the command bar to the left of the list.
- Modify the record field(s) as necessary.
- Click  to save the changes, or...
- To cancel the changes made to the displayed record, click .

Deleting a Test Point

- Locate the test point you wish to delete and click to select it.
- Click .