

<b>SmartPlant Instrumentation Technical User Forum P2C2 (Houston SPI TUF) Meeting</b>	November 5, 2008 8:00 am Phoenix Contact
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<b>Attendees</b>	48 Members in attendance 6 Online via Net Meetings	<b>Copied To</b>	LTUF Members
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<b>Called By</b>	John Dressel	<b>Prepared By</b>	Daniel Lopez
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Item	Topic	Notes	Action/Due
1	Call to Order	- John Dressel called the meeting to order & welcomed user group to Phoenix Contact	
2	Chairman's Notes	<ul style="list-style-type: none"> <li>- Thanks to members and guests for attending this meeting of the Houston SPI LTUF</li> <li>- Theme Interfaces.</li> <li>- Issues to benefit user community also presented in this forum.</li> <li>- Upcoming Conferences were noted where SPI would have some interface or involvement in Technical Content.</li> </ul>	
3	Minutes	- Minutes of last meeting approved	
4	Introductions	<ul style="list-style-type: none"> <li>- Introductions by all in attendance .Each member stood and introduced themselves and spoke of their utilization of SPI.</li> <li>- Welcomed several members who connected into meeting with Webex NetMeeting.</li> </ul>	
5	Product Update	<p>Worley Parson discussed how it is using Smart Plant Foundation with a web application for data transfer. It is an Oracle to Oracle transfer. They are working with SPF team to reveal issues regarding the import utility from Oracle.</p> <p>Discussion was held regarding Smart Plant Engineering Manager as a common administration tool. This is an Intergraph mid term strategy, IT functions relatively easy. If administration functions are transferred into Smart Plant Engineering Manager, what functions will remain within the existing domain.</p> <p>Alex Koifman noted plant and operation migration specific challenges. EPCs need to improve and enhance support for integrated engineering work processes. Provide advanced and reliable engineering and operations data management solutions for operating plants. Respond to discipline specific business driven needs of the engineering community Extend SPI reach from traditional petrochemical industry to power, including nuclear, pharmaceuticals and mining. Continue to improve reliability and usability of the application. Features are also geared to industries on the rise. Intergraph is moving toward improved reliability with relief of short term pain of Hot Fixes and Service Requests.</p>	

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6	Development plans for SPI:	<p><b>V.2007 SP's and v.2008</b>  SPI in 2007/2008 there has been less than 50% who have done the migration from Owner Operators into a specific to project FEED db then back into Owner Operators.  This is due to the extended use of automation features and is highly tied into integration packages, thus good for the path forward.</p> <p>Most of Intergraph's customer base is migrating to v.7 and some v.2007 started but adoption is slow (v.2007 was released February 2007). Therefore new functionality being developed in version 2008 will provide positive impact in 2009 onward. EPC's migrate to utilize new functionality but are constrained by O/O's who are frequently setting SPI version in project specification Upgrades are seen about every 2-5 years, usually driven by Operating System, Servers and use of Oracle or SQL db.</p> <p>At the same time there is a lot of opportunities –both small and large –to improve existing work processes and meet new market challenges in 2008 onward. Intergraph decided to selectively introduce new functionality in version 2007 service packs to attract users to upgrade and address some of their critical business needs. Development shifted accordingly delivering these throughout version 2007 service and reducing the scope of v.2008 scope.  Additional focus of the v.2008 release is to add foundation for additional functionality to come –better support for internationalization, improved publish mechanism, newer technology (more .NET), etc.</p> <p>SPI current status and major design initiatives both current and those under consideration</p> <p><b>Future plans</b>  As Intergraph continues to integrate into the near future, they will do so in 2009 in between major releases, not just from a business perspective but in response to client needs. V2007.6 planned for release end of December 2008</p> <p>Integration: Made PDF generation option at publish time  Integration: Publish DDP dimensions to SP3D in inches or mm (tentative)  Integration: Publish &amp; retrieve instrument process data without process case</p> <p><b>Calibration</b></p> <p>Intergraph is working to implement fixes and enhancements for integration with the Fluke documenting Calibrator. Throughout SP5 and SP6 Calibration module redesigned providing, among other improvements, customizable data entry forms, multiple</p>	

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		<p>calibration profiles and more flexibility selecting different calibration types for the instrument. Create cross-spec form browsers for query and reporting, improvements to the NE100 interface KKS: Allow empty component code classification and support AutoCAD 2008 (also in v.7 SP10).</p> <p><b>V2007.5 released June 12, 2008</b></p> <p>Support PDF generation automation for IDEAL, integration document generation and batch printing in SPI without the need for Adobe or Ghostscript using internal library  Domain Explorer issues related to moving or replicating large data sets resolved  Typical Loop handles Foundation Fieldbus and Soft Tag classes in addition to conventional tags. Allow changing instruments from the Foundation Fieldbus to conventional tag classes (some limitations exists for now). Extend mapping for additional DDP attributes to transfer to SP3D(dry and wet weight and dimensional status).</p> <p>Important usability improvement with the roll-out of the SPLM v.2008  Citrix/Terminal server based deployment is a de-facto standard for large organizations geographically and organizationally spread and also for multi-contractor projects  Project organization and contract relationships required the host to have all licenses in a single license server pool. SPLM v.2008 will allow using multiple license servers from a single Citrix server or farm by designating specific user, e.g. one EPC or maintenance group, to use licenses from a certain license server; this will be Citrix server management administrative function</p> <p>Next major release -V2008</p> <p>Scheduled release: Q1, 2009  Support publishing all SPI engineering documents to integrated engineering environment  Provide ability to publish all browsers with the content and filter what records are included in the published data set. Support volumetric flow condition selection in the Instrument, Calibrated and DCS ranges across the application. Provide complete Oracle Unicode database support. New specifications library built on industry practices  Improved database security and control capabilities. Enable merging project entities into As Build without the need for exclusive use of the domain. Support Citrix Presentation Server 4.5.</p> <p>V2008 –New specifications library</p> <p>V2008 –Support publishing almost all SPI engineering</p>	

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		<p>documents</p> <p><b>Off-site project</b></p> <p>Future short term development plans            Improve support for the project engineering disconnected from the As Built databases –both in the SPI standalone use and in the integrated environments. Develop engineering design re-use mechanism to support: Continued improvements in the plant operational use like enhancing Calibration module and integrating with smart calibrator vendors            Support cross-plant wiring (started). Start developing control logic diagrams documentation capabilities. Continue enhancing and improving NE-100 interface to support vendor information exchange. Enhance composite specifications and allow to use them together with the regular specifications for the same tag. Implement select additional new features with high demand.</p> <p>These and other features will be part of the future major releases and service packs.</p> <p>Improve support for off-line project engineering include using solid and proven solutions, which exists today for on-line project work-sharing / collaboration and for facilities plant engineering using Citrix or Terminal Server. There are still a number of challenges with this approach:            IT infrastructure and security; Communications infrastructure reliability and bandwidth availability in some regions;            Contractual and administrative</p> <p>Alternatives are:            Using the merger utility, which requires highly skilled and experienced knowledge and is not a tool for engineers. It is sensitive to the data integrity. Also examining the use of the Off-line As Built functionality.            Off-line As built project will allow administrators to:            1.Create an engineering project in the O/O host domain            2.Export and send a back-up to initialize off-site domain containing Off-site baseline (As Built) and off-site project            3.Execute project off-site and import it back into host domain to merge into host As Built</p> <p>Planned improvements in the Off-line As Built project functionality will address several issues with the current technology including:            Re-scoping of the off-site project, Synchronizing reference data between host and off-site domain, Intellectual property protection removing process data and other sensitive information from the As built portion of the exported data.            Ability to convert EPC domain into engineering project and merge it back into the As Built</p>	

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		<p><b>Control and Logic</b></p> <p>Intergraph is Developing Control and Logic diagramming capability and plan to add 2 new types of documents –Logic diagrams and Control diagrams, associated objects can include Loop, instruments (conventional, soft tags, Fieldbus, etc), control system tags and I/O channels. Document (drawing) will be a combination of a number of containers arranged in sheets. Container will represent section of the logic. Cross references will allow using Off Page Connectors (OPC) to reference other containers on the same or different pages of the document or in different document. Container content will be created in a graphic environment</p> <p><b>Design re-use</b></p> <p>Intergraph is seeking solutions to the following business challenges to the reuse of standard/typical design packages between projects. Also for packaged vendor equipment instrument information delivery. Licenser and pre-FEED packages transition to FEED and detailed design requirements and Engineers tools.</p> <p>Ability to extract portions of design (groups of loops/tags and associated reference information) to a database neutral format for storage and reuse, Ability to translate/map package item tag names(loop, component, etc) to target domain naming conventions and much more to be considered...</p> <p><b>Cross-plant wiring</b></p> <p>Cross plant wiring and reporting Control system tags from different plants can be linked to one instrument creating cross-plant entity relationships. Especially designated shared wiring entities –cables and/or panels.</p>	
7	<b>SP-PID to SPI</b>	<p>Additional comments to note during the presentation included Administrative roles, users usually made up of CAD Drafters should have a full time specialized team to publish and retrieve data. The Data Sync is a closed loop that should be P&amp;ID driven. Other issues discussed were consistency in the Units of Measure noted the Process Data import had some problems with Units of Measure and Process Design Conditions. Steven Covena asked about the quantity of individuals that must be trained on the Publish and Retrieve teams, which was about 4-5 individuals in Fluor’s case. Bret Fisk noted that in delete or change a work process you will loose the correlation and P&amp;ID will allow duplicate entries. Also regarding the work process the need for inter-discipline participation and involvement is essential.</p>	

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		<p>Alex recapped by noting the need for improved instrument classification for the correlation between SPI and SP P&amp;ID.</p> <hr/> <p><b>What is the SP-PID to SPI Interface?</b></p> <p>SPI has two SP-PID interfaces:                      –The direct interface that works without the SPF share base                      –The SPF Interface that is mapped through the SPF                      This interface allows MOC between tags on the P&amp;ID and S                      ~~                      SP-PID to SPI Interface</p> <p><b>PRE-REQUISITES:</b>                      SPI and SP P&amp;ID must be configured for integration                      –Plant, Area, Unit structure needs to be compatible with the integrated environment</p> <p>Note: Make sure to register all units associate with the plant for SP P&amp;ID.                      –SP P&amp;ID Symbols library must be developed with any project specific modification included.                      –Instrument Tag Naming Conventions from SPI and SP P&amp;ID must be compatible for data correlation.                      –The project configuration needs to register to SP PID client workstation.                      ~~                      SP-PID to SPI Interface</p> <p><b>MINIMUM DATA REQUIREMENTS:</b>                      –The following table indicates the minimum type of information that is to be mapped and shared between applications</p> <p>Note1: Plant Group Name is defaulted to the current unit of the PID Drawing. Needs to make sure that correct unit is selected for item that not in the current drawing unit.                      Note 2: Equipment and Pipe Run will not come across to SPI if no instrument is place on the equipment or pipe run.                      Note 3: Items that do not have values for minimum data required will not be available for reception into other applications. They will only be present in SPF thru publish of PID drawing.                      Note 4: Tag Suffix (As Require) –Example: There are cases that two the pumps have the same number except the suffix. For example: 00-P-100/A and 00-P-100/B                      ~~                      SP-PID Properties Database</p> <p><b>Be Aware:</b>                      –Correct data development in SP P&amp;ID is required for the</p>	

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		<p>integration to work properly</p> <ul style="list-style-type: none"> <li>-Process, Instrument and all users that work in SP P&amp;ID development must be properly trained to monitor the Property Data for the Instruments, Lines and Equipment</li> <li>-Implied Tag numbers (Soft Tags, I/P, tags on chart or matrix and any tag not clearly in an Instrument Bubble) may need to be placed on a hidden layer on the P&amp;ID for data to be passed through the Interface.</li> <li>-Note the absence of "Instrument Type" in the required data table (Tag numbers that exist in both SPI and SP-PID will associate)</li> </ul> <p>~~</p> <p>SP-PID Properties Database</p> <p>Tag Number Properties</p> <ul style="list-style-type: none"> <li>-Instrument Type Modifier</li> <li>-Measured Variable Code</li> <li>-Plant Group Name (Unit)</li> <li>-Tag Sequence Number</li> </ul> <p>Combine to make an equivalent Tag number for the Interface to associate. Note: Unit Number inconsistency</p> <p>Pipe Run Properties</p> <ul style="list-style-type: none"> <li>-Fluid Code</li> <li>-Nominal Diameter</li> <li>-Piping Material Class</li> <li>-Plant Group Name (Unit)</li> <li>-Tag Sequence Number</li> </ul> <p>Combine to make an equivalent Line number for the Interface to work. Note: Only Lines that have Instrument Tag Numbers will propagate to SPI</p> <p>~~</p> <p>SP-PID Properties Database</p> <p>Equipment Properties</p> <ul style="list-style-type: none"> <li>-Fluid Code</li> <li>-Plant Group Name (Unit)</li> <li>-Tag Sequence Number</li> </ul> <p>Combine to make an equivalent Equipment number for the Interface to work</p> <p>Note: Only Equipment that has Instrument Tag Numbers associated to it will propagate to SPI</p> <p>~~</p> <p>SP-PID Review Process</p> <p>Make sure PID go thru process review and check by each discipline</p> <p>Make sure PID development meets the requirement of drafting basic.</p> <ul style="list-style-type: none"> <li>-All objects and label will comply with the authorized data set issued by the project. Request for modifications to the data set will be handled as specified by the Project Procedure Manual</li> <li>-No plant items will be left in either plant stockpile or Drawing</li> </ul>	

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		<p>stock pile</p> <p>–No “Connection Points Unattached” indication will be left unresolved in pipe runs. Make sure all the Instrument tags are correctly input to SP P&amp;ID. Based on the project requirement soft tag can be published or omitted</p> <p>~~</p> <p>Publish SP-PID to SmartPlant Foundation</p> <p>When P&amp;ID is ready to publish to SPF, a revision needs to be created and assigned to the P&amp;ID.</p> <p>The P&amp;ID can be re-published anytime with a new version number</p> <p>–If P&amp;ID Revision Number does not change before re-publish, The SPF interface will assign a sub-number to the current revision.</p> <p>–A P&amp;ID may be published as many times as necessary to maintain a data centric interface</p> <p>~~</p> <p>Retrieve SP-PID from SP Foundation to SPI</p> <p>Only the current revision of the published P&amp;ID is retrievable Note! Tags that are in both SPI and SP_PID will correlate to each other without having to identify new Tags in SPI This will allow SPI users to create an Instrument index in SPI before P&amp;ID publishing without having data overwritten For Tag correlation to work the Unit Number conflict must be corrected with a “Hot Fix”</p> <p>~~</p> <p>Process SP-PID from SPF in SPI</p> <p>Review Action To-Do list items If it is the first retrieve</p> <ul style="list-style-type: none"> <li>–Run Create Instrument tags in SPI</li> <li>–Run Create Line in SPI</li> <li>–Run Create Piping Port 1, 2 in SPI</li> </ul> <p>If it is not the first retrieve</p> <ul style="list-style-type: none"> <li>–If New Tag <ul style="list-style-type: none"> <li>•Run Create Instrument tags in SPI.</li> <li>•Run Create Line in SPI</li> <li>•Run Create Piping Port 1, 2 in SPI</li> </ul> </li> <li>–If Existing Tag <ul style="list-style-type: none"> <li>•Run Update / Delete Instrument tags in SPI</li> <li>•Run Update / Delete Line in SPI</li> </ul> </li> </ul> <p>~~</p> <p>Process SP-PID from SPF in SPI</p> <p>Sample SPI To-Do list</p> <p>Create command means that instrument is not yet in SPI, when you run create it will create instrument in SPI with new value. Instruments already in SPI with matching Tags will associate</p>	

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		<p>with SP-PID Tags ~~ Process SP-PID from SPF in SPI Sample Create Tag, Create command will create a new instrument in SPI with new values. Created Instruments must be edited to add proper Instrument Type, associate to Loop and re-launch profiles for Spec, Process and wiring data ~~ Publish SPI data to SPF</p> <p>Verify and Review data from Instrument Index –When Instrument Index is ready to publish to SPF, the revision needs to be assigned to the document. –Each time new instruments are retrieved and created in SPI, an index must be published to SPF with the new tags to complete the establishment of the required relationships. –Once the Instrument index is published, the instrument tags on the index will be correlated with SP PID and the necessary relationships will be established, and Instrument will change status to share from SPF ~~ Change Management</p> <p>Because P&amp;ID’s on a project are subject to strict change management procedures, when you implement the P&amp;ID’s with integration, the incorporation of approved changes must apply to the shared data as well as the P&amp;ID drawings. To support this work process, the P&amp;ID’s and associated data available for retrieval into SPI must be kept current with the project scope. This requires that the P&amp;ID’s be maintained in SP P&amp;ID and published to Smart Plant foundation as changes are approved.</p>	
8	SPI –SPEL	<p>SPI –SPEL Interface workshop Based on SPI 7.0 and SPEL 3.0 SP1</p> <p>Projects with Instrument Power Requirement may use this interface to SPEL, to obtain circuit numbers, electrical signals and interlock mechanisms. Discussion included the Cable management and master Cable Schedule ownership. Intergraph has even suggested using SP 3D to estimate length and integrate engineering within SP Foundation. It was broadly agreed that SPEL should be the master repository. And generate reports for Construction. Current work process support instruments supplying From/To cable schedules for electrical routing.</p> <p>Created by: Neil Lawrence CDI Presented by:</p>	

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		<p>John Dressel, Fluor General</p> <p>–This workshop will show how to design an electrical system, that includes IO signals crossing from the electrical discipline to the instrumentation, and have the instrumentation wiring details, and the complete SPI Enhanced SmartLoop drawing embedded into the schematics of a motor.</p> <p>Prerequisites settings</p> <p>–Makes sure to define the right settings in the SPEL Options Manager:</p> <ul style="list-style-type: none"> <li>•-Enable SmartPlant reports</li> <li>•-Define the SPI Domain name</li> </ul> <p>~~</p> <p>SmartPlant Electrical Activities</p> <p>Overview</p> <p>We shall use motor M-100 schematics, as shown in Figure 1. The motor is connected to a standard feeder, direct online supply, operated by a local start-stop push button station, connected to the control diagram shown in the schematics. A “Motor Run” status and a “Motor in Manual” status digital input I/O signals are provided at the terminal strip of the motor control center cubicle and from there, connected by the instrumentation to a PLC.</p> <p>~~</p> <p>SmartPlant Electrical Activities</p> <p>The target of this workshop is to show 3 new features:</p> <ul style="list-style-type: none"> <li>–Retrieve terminal numbers of the PLC channel for the signals</li> <li>–Retrieving the ESL data into SPEL motor schematics</li> <li>–View schematics of the motor that the signals belong to in SPI</li> </ul> <p>~~</p> <p>SmartPlant Electrical Activities</p> <p>Detailed workflow</p> <p>–The following data should be designed in SPEL to accomplish the SPEL side: Create M-100, apply a profile on it so to create a power cable and a control station and connect it to a Feeder circuit, as shown in the Figure 2</p> <p>~~</p> <p>Create the 2 -I/O signals under the Feeder M-100 circuit: Signal A= M-100 Run status Signal B= M-100 in Auto status</p>	

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		<p>Make sure you created an I/O registered report, and open it to view your I/O list that will be published:</p> <p>Publish this registered report to the folder you prepared upfront:</p> <p>Create a typical schematics          –Define a typical schematics so to include a motor block and a circuit block that will include 2-I/O signals and the required properties:</p> <p>Note: In this example, the I/O signals are part of the circuit, therefore we created a circuit block that include signals.</p> <p>Create the full typical schematics:</p> <p>Apply this typical schematics to the M-100 motor:</p> <p>Select motor M-100 and Generate the schematics then Save the generated drawing:</p> <p>Define the area within the schematics into which the SP report (ESL) will be embedded          –To define the working area of the smart plant report, open the template that you want to use for the schematics, and View--Display--Working Area:</p> <p>The template will now show the default Working area into which the ESL will be embedded:</p> <p>Adjust the rectangle size by moving the black handles and then save the template.</p> <p>SmartPlant Instrumentation Activities</p> <p>The next steps are to be performed in SPI, and will include the following actions:          –Step 1 Retrieve the IO data and commit the to do list. This procedure is the same as in previous version:</p> <p>Followed by the retrieve:          Browsing to the folder into which SPEL published the data:</p> <p>Following the OK and committing the “To-do-list” (Framework--To-do-list), these Signals will be retrieved into SPI as Electrical Tags, with their associated Motor, circuit, motor typical schematics and schematics: And their properties: Notice the data for the circuit, the motor and the schematics and typical schematics names.</p> <p>Step 2-Associate the 2 electrical tags to a new loop named</p>	

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		<p>“JM-100”</p> <p>Step 3-Design the full wiring of the 2 electrical tags from the MCC right into the PLC I/O channel            –Create a terminal strip under the PDB panel that was automatically created, create a PLC with a DI IO card in one of the slots within a rack.</p> <p>Step 4-Publish the data back to SPEL</p> <p>Step 5-View motor schematics            –Select one of the tags in the Browse of the Index, select Document--SPEL Schematics and view the motor schematics:</p> <p>SmartPlant Electrical Activities</p> <p>Retrieving the data in SPEL            –Retrieve and commit the “to-do-list” of the IO signal data into SPEL, notice that the signals (in property grid) have now Loop number, Host addresses and terminal strips data.            –Select M-100, and generate schematics; observe the signal information and the additional ESL pages that were added to the original typical circuit, Observe that signal data have been added to the schematics (right bottom corner of the drawing)</p> <p>Opening the second page of the schematics: Observe: The left side, showing the PDB side and the right side, showing the PLC connection.</p>	
9	Discussion items & user comments	<p><b>General discussion topics</b></p> <p>The link to download the MTL symbol Library is on the SPI “LTUF” Website <a href="http://spi-ltuf.org">http://spi-ltuf.org</a>. LTUF believes other vendors may be building similar libraries.            Dennis Cooley of EnGlobal built the MTL symbol library and interfaces and is available to answer any questions. Contact an LTUF officer for his telephone number. Note that one cannot use the client’s license. There are 2 types of Intergraph endorsed mechanisms to load into the catalog. Intergraph will not support if solely Vendor specific contents.</p> <p>MTL has made it easier for engineering designers and end users to use their FOUNDATION Fieldbus™ products by developing a utility to import the complete range of MTL-Relcom Fieldbus products (Power Supplies, Megablocks™, surge protectors, and Entity conversion blocks) into SmartPlant Instrumentation version 7.</p> <ul style="list-style-type: none"> <li>•SmartPlant is among the most successful examples of the new generation design tools created to reduce the cost of designing control systems. The cost of designing a single control loop can be in excess of one man-day, so using tools</li> </ul>	

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		<p>like SmartPlant can dramatically reduce these costs. The utility, including all associated files is available for download below.</p> <ul style="list-style-type: none"> <li>•To use the MTL-Relcom SmartPlant library, users must be running a valid copy of SmartPlant Instrumentation ver7.</li> <li>•Registration for download is required so that we can notify users of new updates to the library.</li> </ul> <p>Interfaces mentioned are the Dresser / Consolidated for Pressure Safety Valves.  Rosemount Toolkit and Fisher Firstvue for Control Valves – Emerson uses spec manager to map spec sheet. It is no longer dependant on Intergraph's Spec form 7.  Service Pack 3 contained updated interface with Delta V.  Service Pack 5 has Certified Version of the Hot Fix. Alex mentioned some Emerson Exchange constraints on the Owner Operator and EPC use of the interface. Delta V library cannot publish I/O data in Owner Operator domain. Convert to EPC mode then install Service Pack.</p> <p>RAD engine compatibility, in Version 7 &amp; higher there is no issue with interoperability. In Testing SPEL V8 with SPI 2007 all went well. There are now multiple versions of the RAD engine that work with 2007 on cross reference with SPEL and SPI.</p> <p>SPI Tuf Website  -</p>	
12	Close	<ul style="list-style-type: none"> <li>- Review of meeting</li> <li>- Review of action items</li> </ul> <p>Next meeting will focus on</p> <ul style="list-style-type: none"> <li>- Using "Out of the Box" Specs or Custom</li> <li>- Third party Spec Libraries</li> <li>- Specialty Spec Forms</li> <li>- Analyzer Specs and How they work</li> <li>- Use of Infomaker or Internal Editor for Specs</li> <li>- Exporting Specs to other formats</li> <li>- Getting Process data on specs</li> <li>- Other SPI Specification and Datasheet issues</li> </ul> <p>and will be held <b>February 10, 2008, 8:00 A.M. to 12:00 P.M.</b>  <b>Jacobs Engineering, 5985 Rogerdale, Houston, TX 77046</b></p>	
		<ul style="list-style-type: none"> <li>- John Dressel closed meeting</li> </ul>	