

**Houston LTUF Owner/Operator Committee
Teleconference Meeting September 21, 2010
Minutes**

1. Twenty two (22) committee members participated in the teleconference meeting.
2. Rick Graham of ExxonMobil gave a presentation on use of instrument specification forms in SPI at his company. Refer to separate copy of the presentation.
3. Frank Bielen of Bayer MaterialScience requested that Intergraph provide an Excel-style tool for external editing and input of specification information. Alex Koifmann stated that there is already a CR (#CR-PB-29432) open on this subject, a copy of which is provided here:

CR- PB-29432 Spec Editor to provide multi-tag capability similar to PD Editor
Open-Reviewed (110)

As an instrument engineer in charge of the interfacing with the vendors required to populate their data into SPI specification sheets, I want to be able to export multiple instrument specifications in a single batch (per form) to a single file, so that vendor can quickly and efficiently populate its data and return the data back to the project/plant.

<Definition of Done / Conditions of Satisfaction>

- a) Multiple instrument specifications should be stored in a single file to be send to the vendor;
- b) File should be able to accommodate reasonably high number of specifications, for example 250;
- c) Each instrument specification sheet should retain its drawing number from SPI (if defined) and it should not be editable by the vendor;
- d) Ability of the vendor to update data in the file should be controlled by the Data Dictionary definitions in the Spec module as exists and is used today on a single specification sheets.
- e) Vendor should be able to edit multiple tags in a batch, using the browser capability as exists today in the Process Data Editor.
- f) Vendor will not be able to change the revision of the instrument specifications or increase the revision (by design).
- g) Instrument engineer or administrator should be able to import the file as returned by the vendor resulting in a batch import of many tags and obtain a comparison report indicating individual changes between the current SPI data and data returned by the vendor before accepting and saving imported vendor data, as exists today for single specification sheets.

Alex stated that comments from the committee are welcome as well as they may file an SR with reference to this CR which will increase the likelihood of it being implemented quickly.

4. Bret Fisk of Eli Lilly gave a presentation on the instrument specification form library developed by Lilly and some other companies and then later published by ISA about 2 years ago. These forms are tailored to the pharmaceutical industry. Intergraph has made these set of forms

available in Version 2009 but require a special request to Intergraph to obtain the forms. Refer to separate copy of the presentation.

5. Jim Federlein of Bayer Technology Services provided a presentation on ISA specification standards. Refer to separate copy of the presentation.
6. Frank Bielen and other committee members requested that Intergraph improve the data dictionary in SPI to provide a field where the user can enter the definition of each data field and be able to print a report of data fields and their definitions. Perhaps another feature could be that when a user hovers over the fixed text of a field on a spec form, the definition appears in a “pop up” to provide the user interactive guidance in filling out the specification.

Alex asked if the committee would be willing to develop a requirements document for the “enhanced” data dictionary features being requested. The committee agreed and Rick Graham volunteered to make an initial draft of the requirements. This will then be sent to all committee members for their review and comment.

7. Another discussion centered around providing the user some guidance on which of the many fields on a specification form need to be filled in. Lilly color codes the information required to be completed for a vendor quotation and another color code for the information required for instrument purchase. Jim commented that the application-specific information required for the user to send to the vendor for a recommendation and quote could be standardized by instrument type. But since every company has different requirements and uses for the device-specific information, each company would have to develop its own requirements for the required device-specific information to be placed on each specification form.
8. The next meeting will be November 16, 2010 from 10 AM to Noon EST. Speakers will be:
 - a. Frank Bielen will give a presentation on handling of alarm and trip point information in SPI.
 - b. Rick Graham will give a presentation on storage of additional information in SPI beyond the instrument specification (e.g. loop and entity spec info, document attachments to entities, etc.)