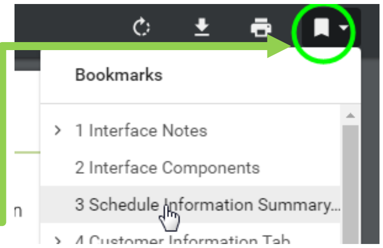
2017 Valve and Actuator Selection Tool

User Guide

This User Guide summarizes the interface and components of the Valve and Actuator Selection Tool.

PDF viewing: If you are viewing this PDF from the browser, easily navigate this document using the Bookmarks at upper right:



1 Interface Notes

1.1 Recommended Browsers and Devices, Minimum Requirements

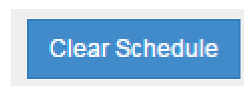
This webtool is best experienced on desktop computers as well as mobile devices 10” or larger, with the latest browsers and their updates applied, as well as default Email. Google Chrome is the recommended browser. Acrobat or equivalent PDF viewer is required for viewing schedules output to PDF, and a spreadsheet program for viewing and modifying .xlsx format schedule outputs.

1.1.1 Browser Notifications

For best results, ensure that the VST is the only browser instance running and fully close the browser each time before accessing the VST again.

1.2 How to Clear Data in the Interface

To clear data and blank out all fields and selections (start from scratch), navigate to the Schedule screen by clicking the Schedule tab at upper right, then click Clear Schedule at the bottom left corner:



1.3 Understand Printing/Saving a Schedule and Formats available

Review Schedule Printing and Display functionality to understand how products and descriptions are provided.

Contents

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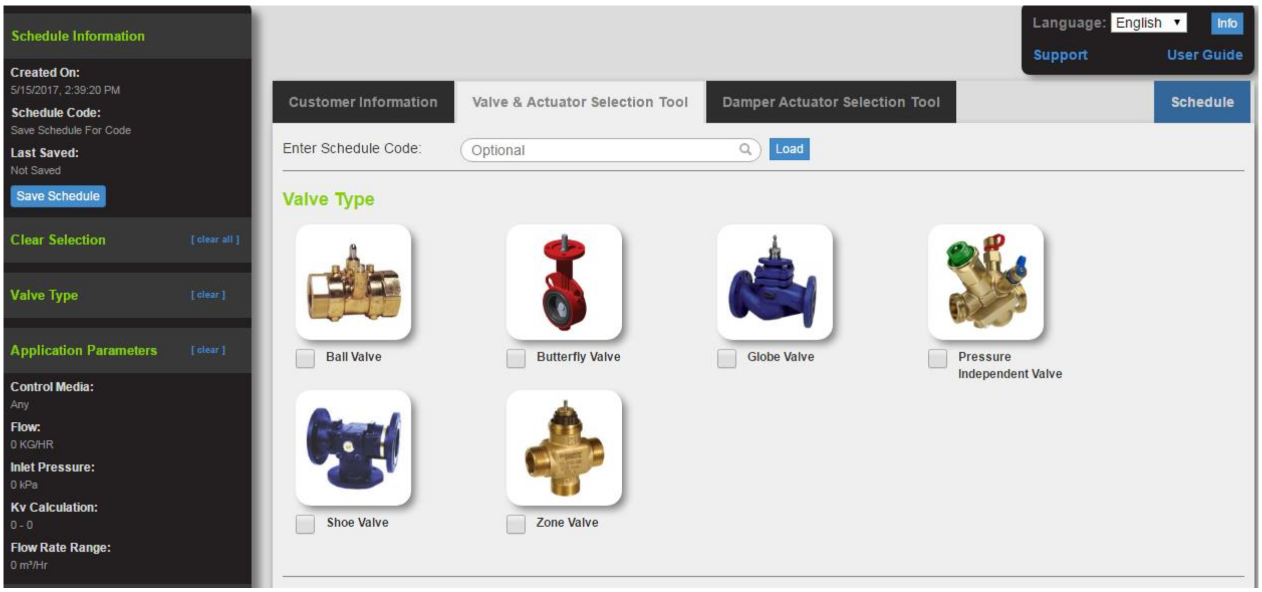
2 Interface Components

The startup interface presents two main components.

a. **Schedule Information Summary** on the left and

b. the **main body** of the interface on the right, with tabs for:

Customer Information
Valve and Actuator Selection Tool
Damper Actuator Selection Tool
Schedule tab provides a summary table compiled from choices made in the product selection process.



3 Schedule Information Summary (left of screen)

This region of the screen updates as selections are made during the process.

- Schedule Information
    - Created On
    - Schedule Code
      When a schedule is saved, data shown here is updated to provide an email link.
    - Last saved
    - Save Schedule (Button)
- Customer Information
- Project Information
- Schedule Details

4 Process Overviews

4.1 Customer Information

The Customer Informaton Tab is where information about a company and project schedule information is entered.

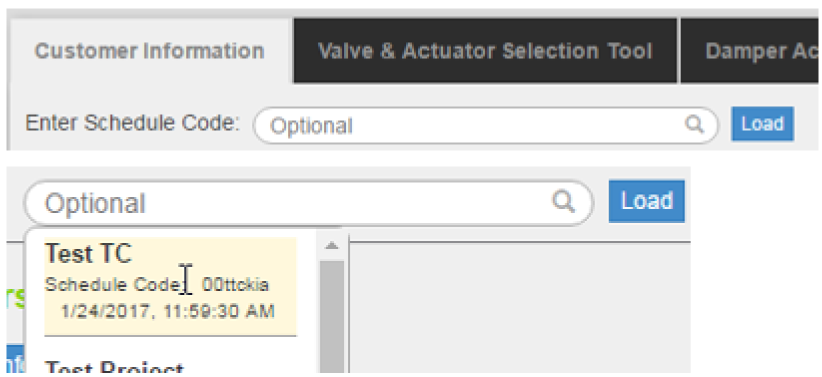
Users first create a profile of their company that can be saved as a template for later recall when working on future project schedules.

Once information is entered and saved using the Save Current Info button, users are prompted to save the template with a name. In the future, use the dropdown selection box next to the Save Current Info button to select the template name.

Note: In order to save Company Image and Customer Image for later reuse each time, the Save Schedule button needs to be clicked and that particular schedule will have to be recalled again to get those graphics automatically each time.

4.2 Schedule and Schedule Code Creation

Once the information for each project is filled out also including information such as Project Name, Project Number and so on, and adding items to the Schedule itself, clicking the Save Schedule button automatically creates a Schedule Code which appears on the left of the interface, along with a link for emailing the schedule code.



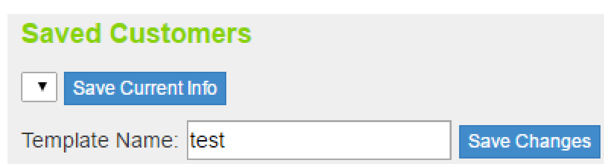
Note: When copying this code number, ensure there are no blank spaces at the end of the name when placing this code into the Enter Schedule Code text box below.

To recall a previous schedule, enter a schedule code in the rounded text box then click Load, or click the Magnifier icon to see a drop-down menu selection of saved schedules and their codes.

Once clicked from the list, the schedule and all associated information is automatically loaded into the interface.

4.3 Save Current Info

Clicking the Save Current Info button displays a Template Name text entry box and a Save Changes button for the user to name the template being creating in this process.

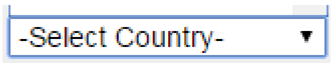


Once a template has been saved, the user can get access to it at any time with the small dropdown arrow:

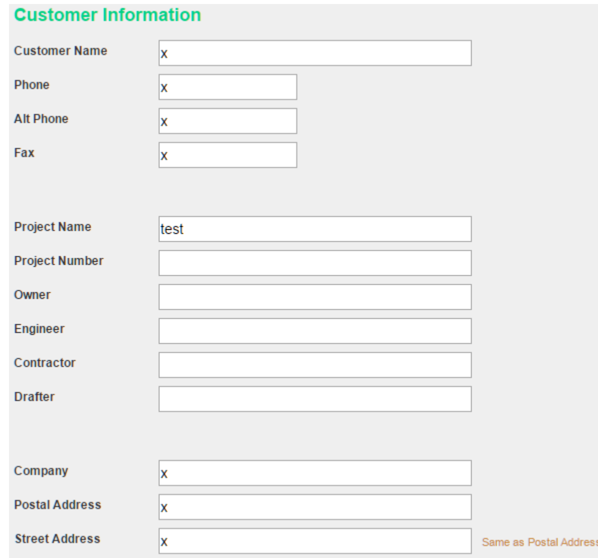
Once a schedule is saved, the Schedule Information panel on the left is updated to show the Code assigned to the saved schedule plus a link to send that code via email. See 5.1 Save and Email Schedule

4.4 Location

Selecting Country in the drop down pulls location-specific into the interface for product offerings. Making this selection alters the data being accessed by the tool based on user location in either Metric or Imperial measures, for instance Kv instead of Cv.



4.5 Customer Information



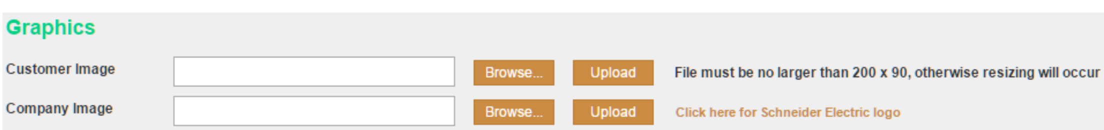
- Customer name, phone, alt phone, fax
- Project Name
- Project Number
- Owner
- Engineer
- Contractor
- Drafter
- Company
- Postal Address
- Street Address: click “Same as Postal Address” to designate the Street Address the same as Postal (mailing) address.

4.6 Graphics in the Schedule

Note: You must click **“Upload”** for a selection image to be saved into the system and displayed on the output file.

Users can import and save Customer and Company Images for customization of the schedule when exported. This allows companies to carry their brand into schedules submitted to outside entities.

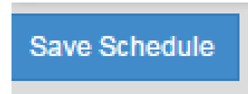
A selected file cannot be larger than 200x90 pixels (2.67 x 1.2 inches) to avoid automatic re-sizing. Click the hyperlink to select the authorized SE logo if another company logo is not selected.



5 Common Functions and Buttons

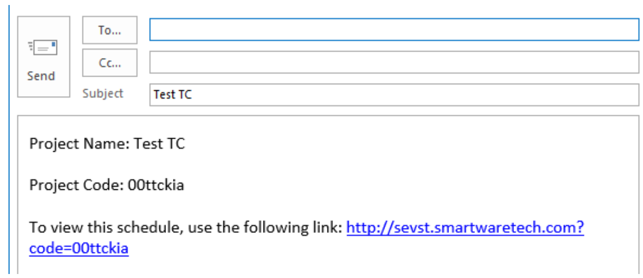
5.1 Save and Email Schedule

Click to save the current schedule. Schedules and all user selected data such as Preferred lists are saved in the Schneider Electric server.



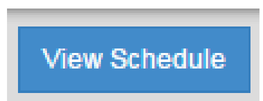
When saved, the tool will generate a Schedule Code, displayed on the left of the tool under Schedule Information. This schedule can then be emailed by using the Click To Email function next to the displayed code. The email will include a link to return to the schedule as well as project information associated with the schedule.

When the email link is clicked, the link is placed in a mail for the user's email account:



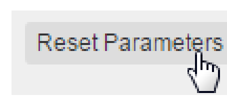
5.2 View Schedule

Click to view the current Schedule.



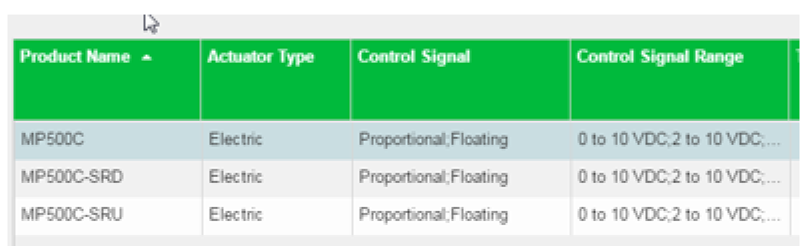
5.3 Parameters and Filters

Selecting various parameters and filters in the interface automatically updates the Product list, and may also enable or disable features and controls based on the selections. To reset parameters and filters at any time click the Reset Filters button.

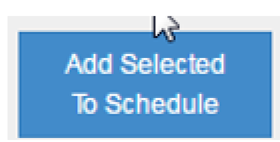


5.4 Tables in Valve and Actuator tabs

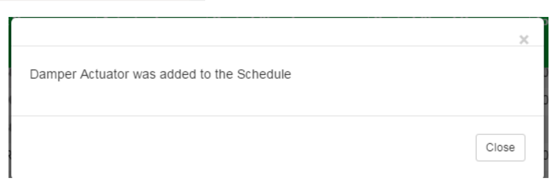
Tables in the interface are updated based on selections made in the process based on filter selections. Typically you can click an item in the list then click **Add to Schedule.** You can sort items in a column high/low or a/z by clicking the column heading. If you have selected from both valves and actuators in the process, the button changes to read **Add Selected Valves/Actuators to Schedule**.



Product Name	Actuator Type	Control Signal	Control Signal Range
MP500C	Electric	Proportional;Floating	0 to 10 VDC;2 to 10 VDC;...
MP500C-SRD	Electric	Proportional;Floating	0 to 10 VDC;2 to 10 VDC;...
MP500C-SRU	Electric	Proportional;Floating	0 to 10 VDC;2 to 10 VDC;...



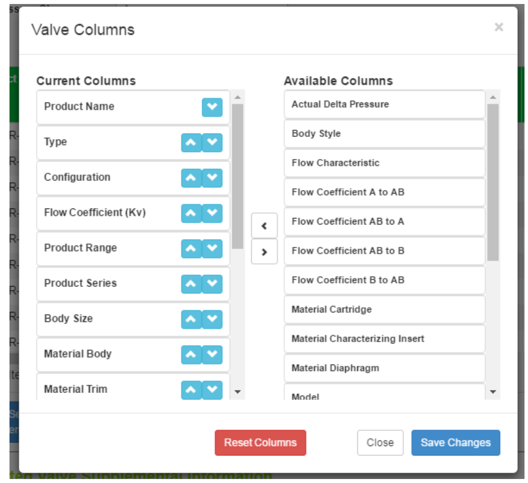
Upon completion a dialog is presented:



5.4.1 Table Column Settings

Column settings are accessed by clicking the button at the upper right of the schedule table.

Select from a column heading shown then click the < or > arrow icons to move it to/from either the Available or Current Columns list, then click Save Changes. Click Reset Columns to return to the default column layout.

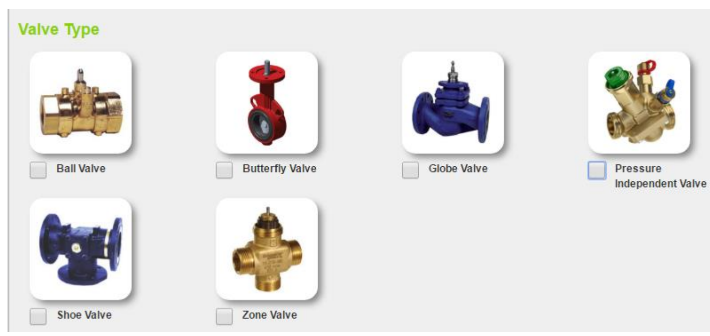


6 Valve & Actuator Selection Tool Tab

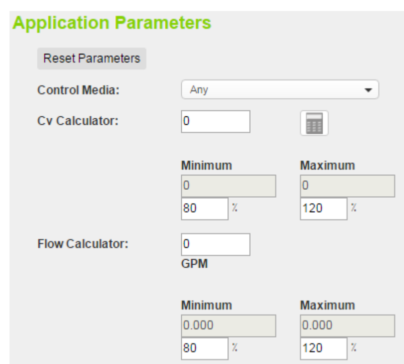
Clicking selection checkboxes here populates the left navigation menu for selections made in the process as well as populating the Selection Table.

6.1 Valve Type

Select from the various product image checkboxes to proceed. The Navigation menu at the left populates based on selections made:



6.1.1 Application Parameters

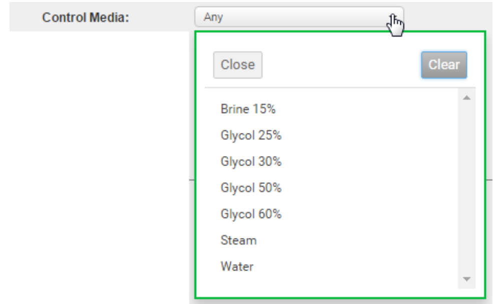


6.1.1.1 Reset Parameters

Click this button to reset all the parameters to their defaults

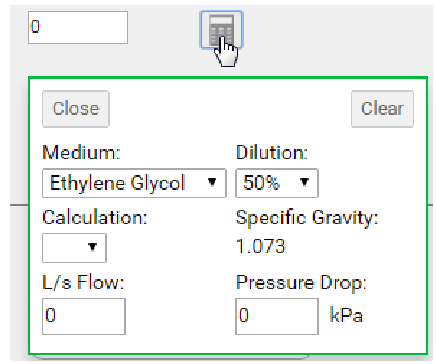
6.1.1.2 Control Media

Select from the dropdown list for various media flowing in the valve.



6.1.1.3 Cv Calculator

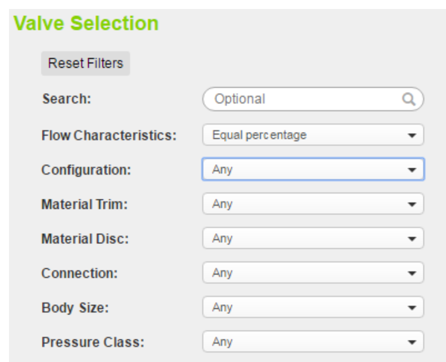
To include a Cv range enter the value in Cv calculator box. You can enter a Cv value directly. The range will automatically be computed based on the minimum and maximum percentages. To calculate the Cv value, click on the calculator button.

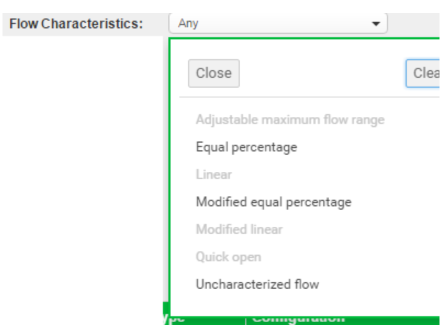


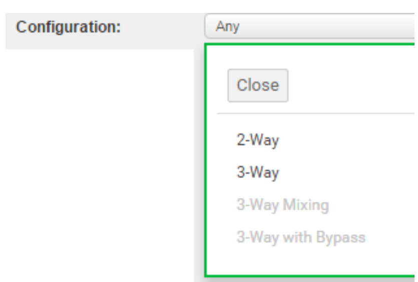
6.2 Valve Selection

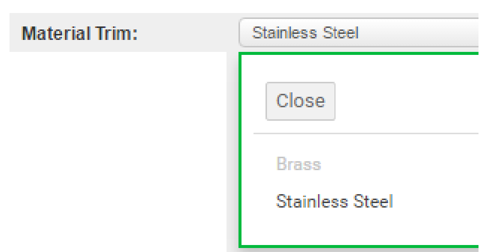
Select from the dropdowns provided to select valve information:

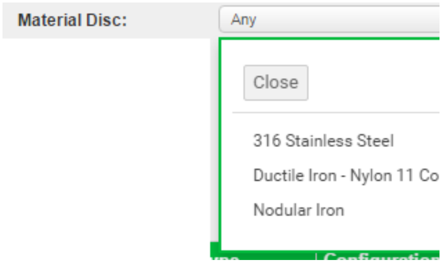
- Search
- Flow Characteristics
- Configuration
- Material Trim
- Material Disc
- Connection
- Body Size
- Pressure Class

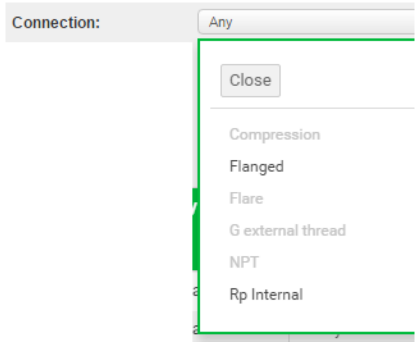


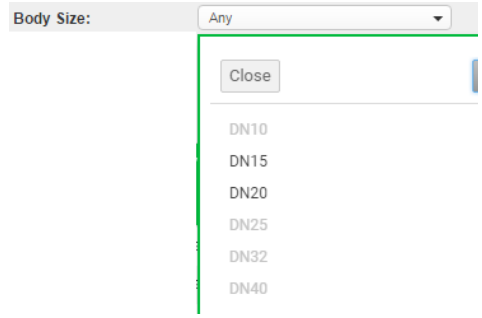


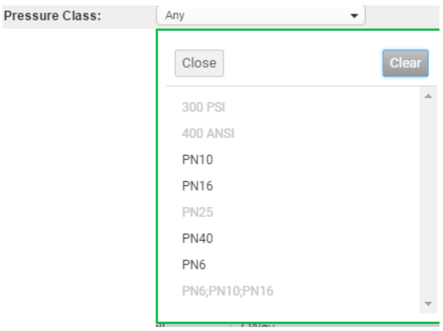






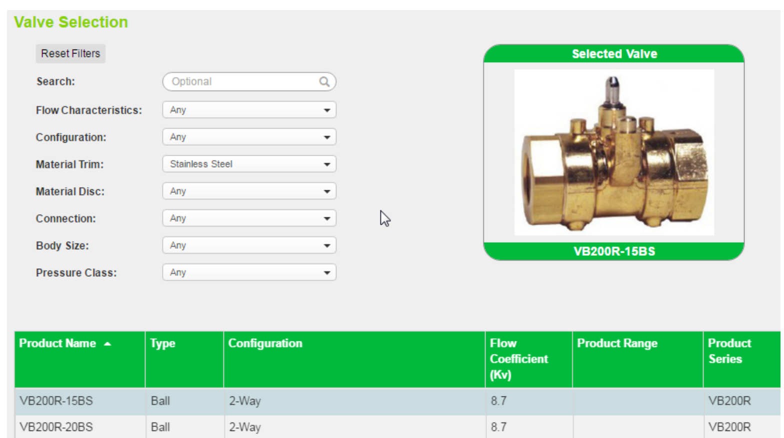






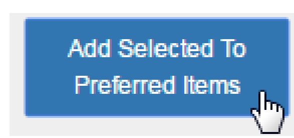
6.3 Valve and Actuator Selection Tool Table

Product Name, Type, Configuration, Flow Coefficient (Kv), Product Range, Product Series etc. Selecting from the table populates shows the selected product image on screen:



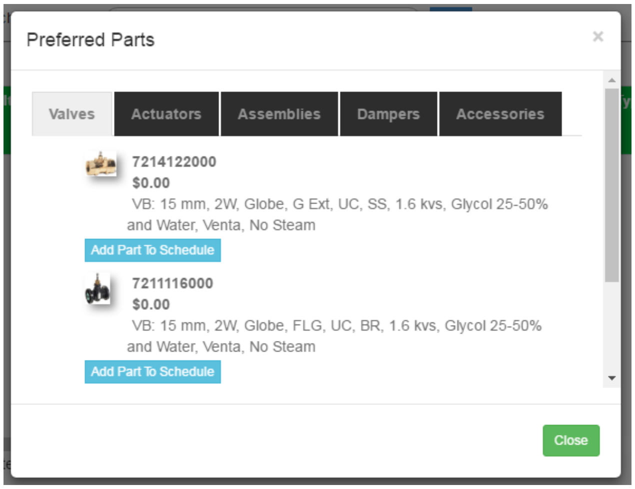
6.3.1 Preferred Items

Items selected in the Table can be added to a Preferred Items list by clicking the button for Add Selected to Preferred Items:



A confirmation for the valve being added to Preferred parts is shown on screen:

Items in the Preferred Parts are independent of the schedule or other selections being made during the process; they are placed into a “favorites” storage queue that you can access and select from at any time and regardless of any already loaded schedule.



6.4 Selected (Valve/Actuator) Supplemental Information

A selected item from the Table populates the Supplemental Information section which is collapsed by default. Expand the data to view the information for the selected item.

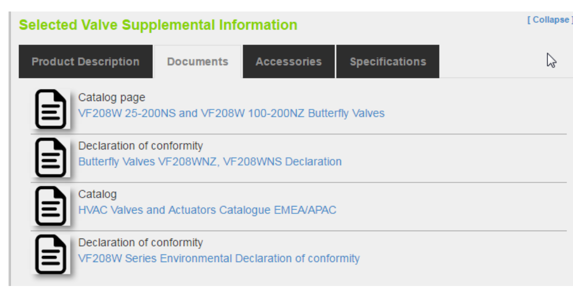
- Product Description
- Documents
- Accessories
- Specifications

6.4.1 Product Description

An image is presented along with relevant data. Note that any alerts on the product are also contained in this view.

6.4.2 Documents

Any relevant documents are shown here.

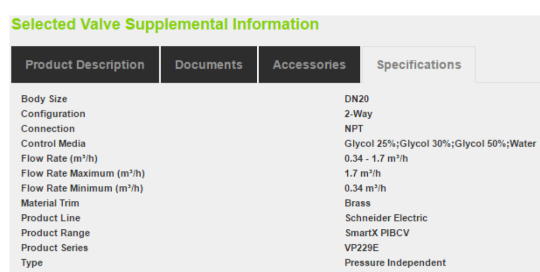


6.4.3 Accessories

Any accessories for the product are listed here.

6.4.4 Specifications

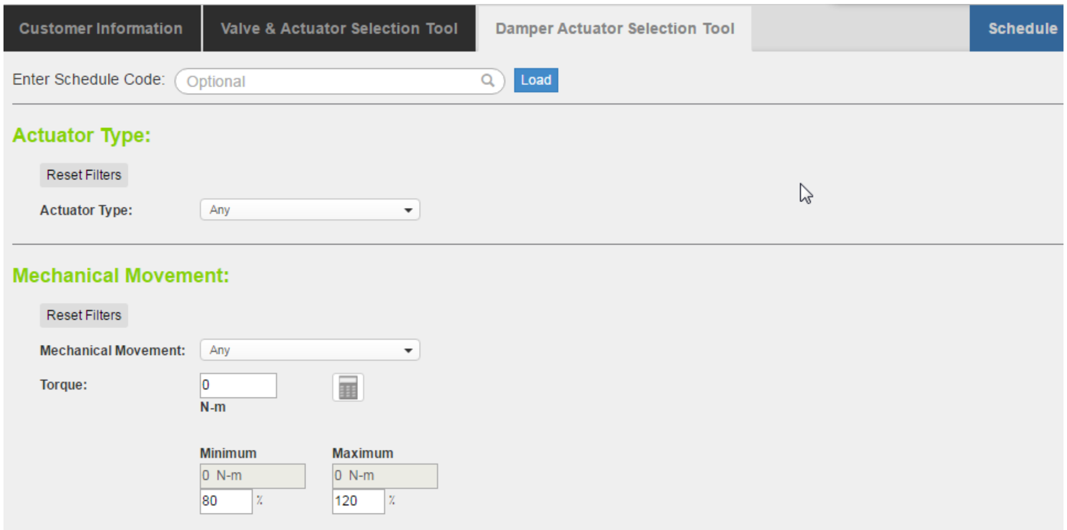
Any relevant specifications are listed here.



7 Damper Actuator Selection Tool Tab

The Damper Actuator Selection Tool interface presents similar choices as previously covered for Valve Selection.

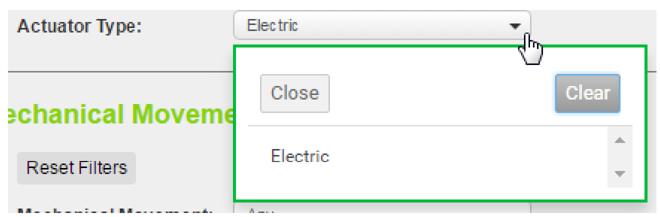
- Actuator Type
- Mechanical Movement
- Actuator Selection
- Damper Actuator Selection Tool Table



7.1 Actuator Type

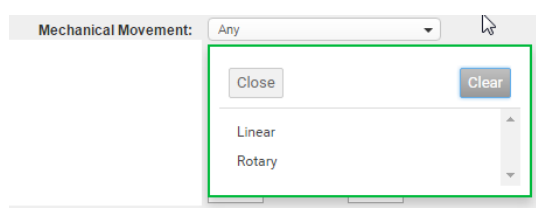
Note: Click the Close button or anywhere on the screen to dismiss the dialog.

Select the type of Actuator desired from the dropdown list:



7.2 Mechanical Movement

Click the dropdown for the type of mechanical movement.



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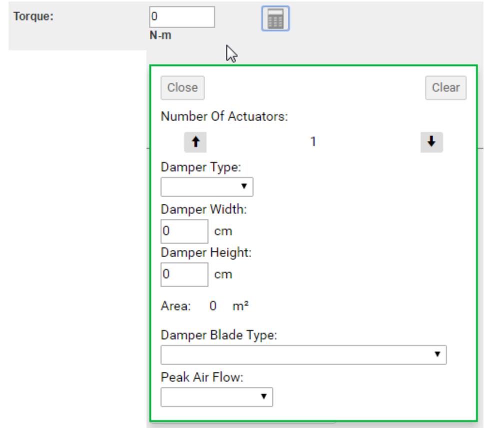
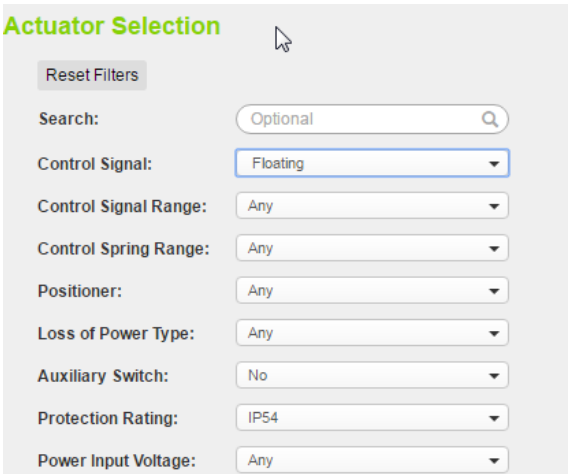
7.3 Select Torque

Enter the Torque desired then click the Calculator icon for more selections:



7.4 Actuator Selection Filters

Select various filters for the actuator.



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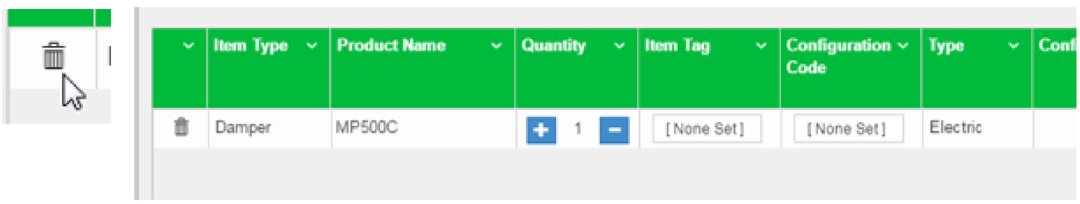
8 Schedule Screen

Contents

8.1 Missing Information and Saving a Schedule

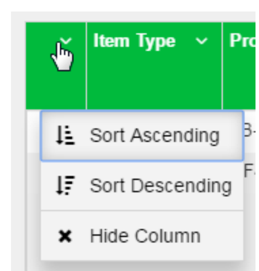
Note that if Customer information is not filled out such as no country selected, a dialog appears declaring “You must select a Country for this schedule before saving it.”

The Schedule Screen shows the selections made in the process so far, in a Schedule Table. To delete an item, click an item in the table and click the Trash can icon (reducing the quantity to zero using the + or - button is the same as deleting an item).



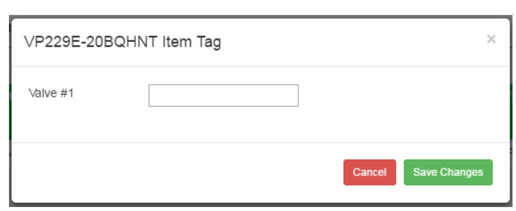
8.1.1 Column headers

Click on a column header for a dialog showing options such as sorting Ascending / Descending, removing a sort, or hiding the trash column. To get any column back again use the Settings icon in the upper right of the table.



8.2 Item Tag

The Tag box allows entering a custom tag for a valve assembly that appears on the Schedule, e.g. AHU-1. This box also feeds information into the iPortal export Excel file which is used to populate the tagging feature in iPortal so the assembly is tagged during manufacturing.



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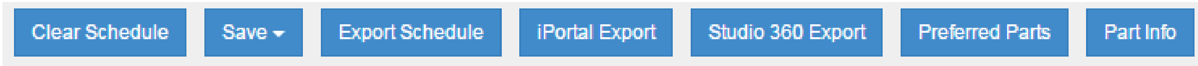
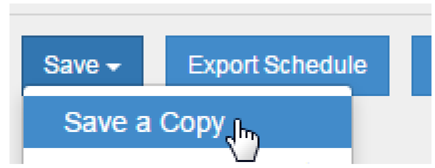
8.3 Schedule Buttons



8.3.1 Clear Schedule

Use Clear Schedule to remove all items from the Schedule.

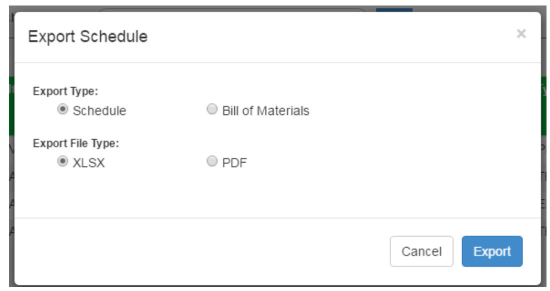
8.3.2 Save



Save a Copy of the schedule to the clipboard.

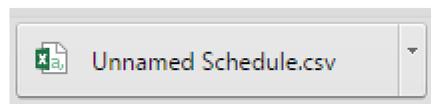
8.3.3 Export Schedule

Select from Export Type either Schedule or Bill of Materials, then select file type either XLSX or PDF. Schedule produces a Schedule format while Bill of Materials produces the familiar BOM appearance. Export choices are a downloaded XSLX (Excel) or PDF (Acrobat Reader) file.

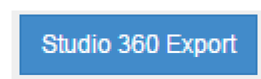


8.3.4 iPortal Export

Clicking the iPortal export button causes the schedule to be exported to a .csv file and downloaded to your browser's download folder:



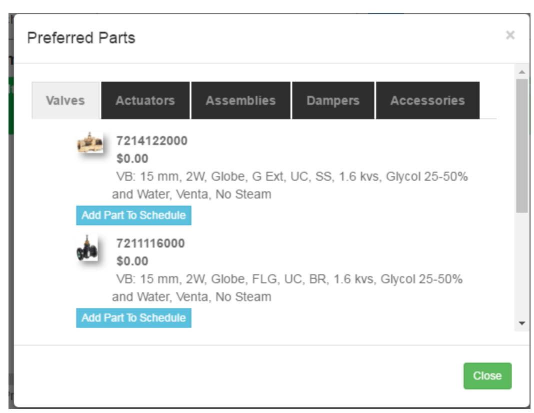
8.3.5 Studio 360 Export



- Create a Valve or Damper schedule; the export will put them on two different tabs in the final output.
- At the bottom of the Schedule, click the "Studio 360 Export" button. The Excel file will download.
- Copy it from your browser's download folder to the Files tab of a Valve Schedule node.
- On the Schedule tab of the Schedule node, click the Import Rows button.
- Select the Excel file and the worksheet, then click OK to import the rows.

8.3.6 Preferred Parts

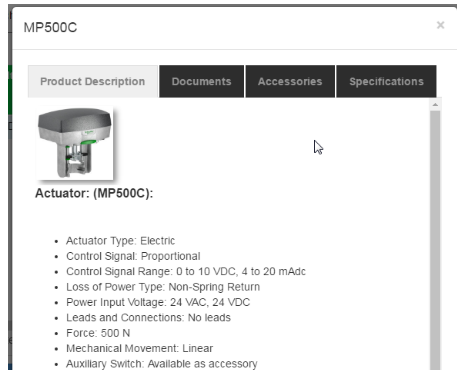
Clicking the button for Preferred Parts adds a selected item into the Preferred Parts queue of the server.



8.3.7 Part Info

Click to view details for a selected part in the Schedule; the default first tab opened in the Product Description tab:

This dialog also shows tabs for:



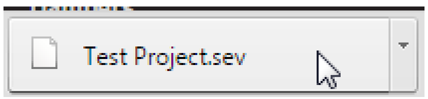
- Documents: lists any related documentation.
- Accessories: lists any related Accessories.
- Specifications: lists the Specifications for the product.

8.3.8 Save a Copy

Save a Copy will save the current schedule to a new Schedule Code that can be modified, while keeping the original schedule code intact. It can also be used to create a new copy of a schedule to send to someone else to modify.

8.3.9 Save to 360 Import

The Schedule is saved with the current project name as an .sec file in the Browser designated save folder (Google Chrome shown here):

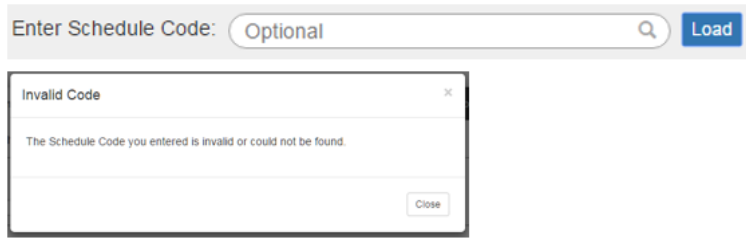


9 Error Messages and Troubleshooting

Contents

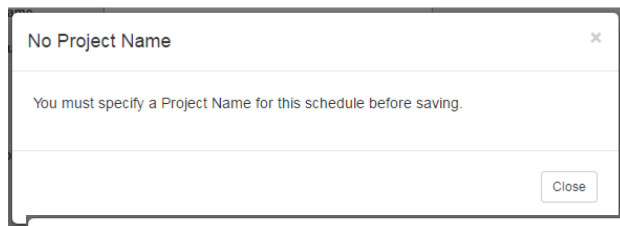
9.1 Schedule Code Invalid

In Customer Information, clicking the Load button after entering a value in the Enter Schedule Code returns a warning dialog if a schedule code is not found.



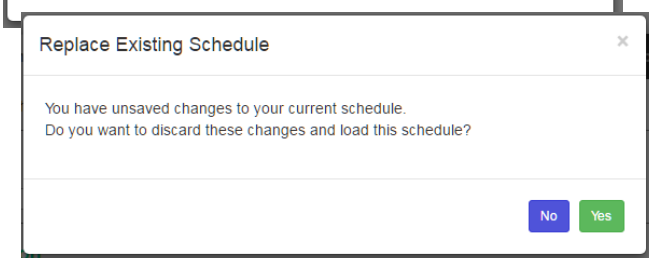
9.2 Various missing data warning dialogs

A warning dialog appears each time data is missing or incorrectly entered in various fields and parameter selections for valves and actuators.



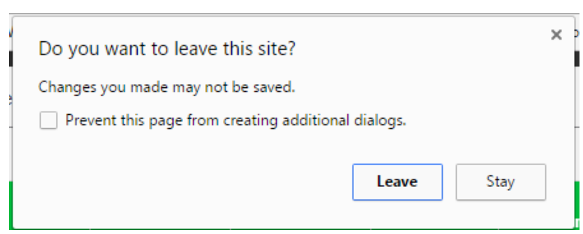
9.3 Clicking Load button while working on a schedule

If you click the Load button while working on a schedule a dialog appears declaring unsaved changes and confirming if you want to discard the changes to load a schedule.



9.4 Clicking Back button in the browser

Clicking the browser Back button instead of a button in the interface warns of leaving the current page.



9.5 Troubleshooting and Contact Information

Refer to www.schneider-electric.com for support information.