

**TECHNICAL REPORT**

**ISA-TR18.2.7-2017**

**Alarm Management When  
Utilizing Packaged Systems**

**Approved 17 February 2017**

ISA-TR18.2.7-2017, Alarm Management When Utilizing Packaged Systems

ISBN: 978-1-945541-37-7

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## Contents

Abstract .....	11
Foreword.....	11
Preamble .....	12
1. Scope .....	13
1.1 General considerations .....	13
1.2 Alarm system interfaces .....	13
1.3 Packaged system design .....	13
1.4 Safety instrumented systems .....	13
2. Normative references .....	13
3. Definition of terms and acronyms .....	14
3.1 Definitions from ISA-18.2.....	14
3.2 Definitions from sources other than ISA-18.2 .....	17
3.3 Acronyms from ISA-18.2.....	17
3.4 Acronyms from sources other than ISA-18.2.....	17
4. Introduction .....	18
4.1 Purpose .....	18
4.2 Overview.....	18
4.3 The alarm management lifecycle.....	19
4.4 Document structure .....	20
5. What is a packaged system .....	20
5.1 Purpose .....	20
5.2 Terminology .....	21
5.3 Supplier and commercial considerations .....	22
5.4 Legacy PSs.....	22
5.5 System architectures .....	22
5.6 Operator interfaces.....	23
5.7 Examples of packaged systems .....	23
5.8 Special cases.....	24
6. Benefits of packaged system alarm management .....	25
6.1 Purpose .....	25
6.2 Benefits for end users.....	25
6.3 Benefits for packaged system vendors .....	26
7 Packaged system control panels .....	26
7.1 Purpose .....	26
7.2 Panel location as a consideration.....	27
7.3 Integrating a PSCP into a BPCS .....	27
7.4 Locating a packaged system control panel in a control room.....	33
7.5 Implementation of packaged system control panel alarm functionality .....	33
7.6 Alarm acknowledgement and the packaged system control panel .....	34
7.7 The packaged system control panel human-machine interface (HMI) .....	34
8. Packaged system interfacing details .....	35
8.1 Purpose .....	35

8.2 Alarm source .....	35
8.3 Types of interfaces .....	35
8.4 Interface design considerations .....	37
9. Alarm philosophy .....	41
9.1 Purpose .....	41
9.2 Packaged systems special considerations .....	41
9.3 Alarm generation .....	41
9.4 Alarm annunciation and acknowledgement .....	42
9.5 Alarm handling methods .....	42
9.6 Communication issues .....	43
9.7 Time synchronization and accuracy .....	44
9.8 First-out alarming .....	44
9.9 Alarm logging and history .....	44
9.10 Key performance indicators (KPIs) .....	44
9.11 Roles and responsibilities .....	44
9.12 Alarm testing .....	45
9.13 Management of change (MOC) .....	45
10. Alarm system requirements specification .....	45
10.1 Purpose .....	45
10.2 Applicability to processes / facilities utilizing packaged systems .....	45
11. Alarm identification .....	47
11.1 Purpose .....	47
11.2 Starting point for identification .....	47
11.3 Potential alarms for packaged systems .....	47
11.4 Common PS signals that are typically not alarms .....	47
12. Rationalization .....	48
12.1 Purpose .....	48
12.2 Alarm priorities .....	48
12.3 Master alarm database and documentation .....	48
12.4 Alarm setpoints and interlock/shutdown logic .....	49
12.5 Need for advanced alarming techniques .....	49
12.6 Alarm classification for packaged systems .....	49
12.7 Rationalization team makeup .....	50
13. Basic alarm design for packaged systems .....	50
13.1 Purpose .....	50
13.2 General .....	50
13.3 Basic alarm design .....	51
13.4 BPCS alarm system functions .....	52
14. Alarm routing .....	52
14.1 Purpose .....	52
14.2 Alarm routing design considerations .....	52
14.3 Examples .....	54
15. HMI representation of alarms .....	56



- 15.1 Purpose ..... 56
- 15.2 Packaged equipment control systems integration and HMI capabilities ..... 56
- 15.3 Stand-alone independent packaged system with PSCP as the HMI ..... 56
- 15.4 Semi-integrated and fully-integrated packaged system HMI considerations ..... 57
- 15.5 ISA-18.2 applicability to packaged system alarm functionality ..... 58
- 15.6 Alarm shelving and PSCPs ..... 61
- 15.7 ISA-18.2 HMI display list with requirements and recommendations ..... 61
- 16. Implementation ..... 62
  - 16.1 Purpose ..... 62
  - 16.2 Implementation planning ..... 62
  - 16.3 Initial training ..... 62
  - 16.4 Testing ..... 62
- 17. Operations ..... 63
  - 17.1 Purpose ..... 63
  - 17.2 Alarm response procedures ..... 63
  - 17.3 Alarm shelving ..... 63
  - 17.4 Refresher training for operators ..... 64
- 18. Maintenance ..... 64
  - 18.1 Purpose ..... 64
  - 18.2 Periodic testing ..... 64
  - 18.3 Additional requirements in highly regulated industries ..... 64
  - 18.4 Process safety management ..... 64
  - 18.5 Loss of communication due to maintenance ..... 64
- 19. Monitoring and assessment ..... 65
  - 19.1 Purpose ..... 65
  - 19.2 Metrics and key performance indicators (KPIs) ..... 65
  - 19.3 Alarm analyses for packaged systems ..... 65
- 20. Management of change ..... 67
  - 20.1 Purpose ..... 67
  - 20.2 Approval and authorization of changes ..... 67
  - 20.3 Implementation of changes ..... 67
  - 20.4 Synchronicity between packaged system and BPCS ..... 67
  - 20.5 Alarm changes which may affect control logic ..... 67
- 21. Audit ..... 68
  - 21.1 Purpose ..... 68
  - 21.2 Audit items related to packaged systems ..... 68
- 22. References ..... 69
- 23. Bibliography ..... 69

## Figures

Figure 1 – Alarm system dataflow with multiple packaged systems included .....	19
Figure 2 – Alarm management lifecycle.....	19
Figure 3 – Degree of packaged system integration with the BPCS .....	28
Figure 4 – A packaged system with stand-alone independent operation .....	28
Figure 5 – A packaged system with semi-integrated operation .....	30
Figure 6 – A packaged system with fully integrated operation .....	31
Figure 7 – PSCP operational characteristics related to the degree of integration .....	32
Figure 8 – Relocation of a packaged system control panel.....	33
Figure 9 – Example PS alarm data interfaces with data flow .....	36
Figure 10 – Recommended alarm state indications (from ISA-18.2 Table 4) .....	61
Figure 11 – Alarm performance metric summary (from ISA-18.2 Table 7).....	66

## Abstract

In 2016, the ANSI/ISA-18.2-2016 (ISA-18.2) alarm management standard was released. This technical report, Alarm Management When Utilizing Packaged Systems, provides guidance on the application of the ISA-18.2 standard to facilities that use packaged systems. This includes guidance for designing, configuring, interfacing and implementing alarms with respect to packaged systems and integrating them into a facility's BPCS (basic process control system). Other topics addressed include how to apply the various ISA-18.2 life cycle stages to packaged systems, common interfacing issues, and the many benefits of using a standardized alarm management approach for integrating packaged systems with a BPCS. This report also contains some content on stand-alone packaged systems.

## Foreword

In June of 2009, ISA-18.2-2009, Management of Alarm Systems for the Process Industries, commonly referred to as ISA-18.2, was issued. Subsequently, the standard was adopted by ANSI and became ANSI/ISA-18.2-2009. In 2009 the ISA18 committee also established six working groups to develop a series of technical reports with guidance on how to implement the principles contained in ISA-18.2. The six technical reports are listed below with a brief overview. In 2016 the standard underwent revisions and became ANSI/ISA-18.2-2016.

- TR1 – Alarm Philosophy – provides guidance on the alarm philosophy. TR1 is limited to the scope of Clause 6 in ISA-18.2. The alarm philosophy provides guidance for successful management of the alarm system. It covers the definitions, principles, and activities by providing overall guidance on methods for alarm identification, rationalization, classification, prioritization, monitoring, management of change, and audit.
- TR2 – Alarm Identification and Rationalization – provides guidance on alarm identification and rationalization. TR2 is limited to the scope of ISA-18.2 Clauses 8 and 9. Identification and rationalization covers the processes to determine the possible need for an alarm or a change to an alarm, systematically compare alarms to the alarm philosophy and determine the alarm setpoint, consequence, operator action, priority, and class. Activities include, but are not limited to: identification, justification, prioritization, classification, and documentation.
- TR3 – Basic Alarm Design – provides guidance on basic alarm design. TR3 focuses on the scope of ISA-18.2 Clause 10 and may include other clauses as needed (e.g., operations and maintenance). Basic alarm design covers the selection of alarm attributes (e.g., types, deadbands, and delay times) and may be specific to each control system.
- TR4 – Enhanced and Advanced Alarm Methods – provides guidance on advanced and enhanced alarm methods. TR4 focuses on the scope of ISA-18.2 Clause 12. Enhanced alarm design covers guidance on additional logic, programming, or modeling used to modify alarm behavior. These methods may include: dynamic alarming, state-based alarming, adaptive alarms, logic-based alarming, predictive alarming, as well as most of the designed suppression methods.
- TR5 – Alarm Monitoring, Assessment, and Audit – provides guidance on monitoring, assessment and audit of alarms. TR5 focuses on the scope of ISA-18.2 Clauses 16 and 18. Monitoring, assessment, and audit cover the continuous monitoring, periodic performance assessment, and recurring audit of the alarm system.
- TR6 – Alarm Systems for Batch and Discrete Processes – provides guidance on the application of ISA-18.2 alarm life cycle activities to batch and discrete processes, expanding on multiple clauses of ISA-18.2.

In 2013, the ISA18 committee established a seventh committee to develop this technical report on alarm management for facilities utilizing packaged systems which can be summarized as follows:

- TR7 – Alarm Management when Utilizing Packaged Systems – provides guidance on the application of ISA-18.2 to facilities that use packaged systems. This includes guidance for designing, configuring, interfacing and implementing alarms with respect to packaged systems and integrating them into a facility's BPCS (basic process control system).

Each technical report is written to be a standalone document. In an effort to minimize repetition, the technical reports have cross references.

The guidance as presented in this document is general in nature, and should be applied to each system as appropriate by personnel knowledgeable in the manufacturing process and control systems to which it is being applied.

### **Preamble**

ANSI/ISA-18.2-2016 describes requirements that address alarm systems for facilities in the process industries to improve safety, quality, and productivity. The general principles and processes in ANSI/ISA-18.2-2016 are intended for use in the lifecycle management of an alarm system based on programmable electronic controller and computer-based human-machine interface (HMI) technology.

The ISA-18.2 standard, however, does not provide specific guidance on how to effectively apply alarm management to scenarios where packaged systems are used in process facilities. This technical report provides guidance for this type of application of alarm management.

Note that, as a technical report, the contents of this document are informative. ANSI/ISA-18.2-2016 contains the mandatory (normative) requirements.