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1 introduction

1.1 Scope and purpose of the Safety Manual

This safety manual provides the information necessary to design, install, verify and maintain a Safety Instrumented Function (SIF) utilizing the Duball DL Ball Valve. This manual provides necessary requirements to enable the integration of the Duball DL Ball Valve when showing compliance with the IEC 61508 or IEC 61511 functional safety standards.

This Safety Manual indicates all assumptions that have been made on the usage of the Duball DL Ball Valve. If these assumptions cannot be met by the application, the SIL capability of the Duball DL Ball Valve may be adversely affected.

1.2 Skill level required

System design, installation and commissioning, and repair and maintenance shall be carried out by suitably qualified personnel.

1.3 Terms, abbreviations and acronyms

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Safety</td>
<td>Freedom from unacceptable risk of harm.</td>
</tr>
<tr>
<td>Basic Process Control System (BPCS)</td>
<td>Basic Process Control System - a system which responds to input signals from the process, its associated equipment, other programmable systems and/or an operator and generates output signals causing the process and its associated equipment to operate in the desired manner but which does not perform any safety instrumented functions with a claimed SIL ≥ 1.</td>
</tr>
<tr>
<td>Fail-safe State</td>
<td>State where solenoid valve is de-energized and spring is extended.</td>
</tr>
<tr>
<td>Fail Annunciation Detected</td>
<td>Failure that does not cause a false trip or prevent the safety function but does cause loss of an automatic diagnostic and is not detected by another diagnostic.</td>
</tr>
<tr>
<td>Fail Annunciation Undetected</td>
<td>Failure that does not cause a false trip or prevent the safety function but does cause loss of an automatic diagnostic or false diagnostic indication.</td>
</tr>
<tr>
<td>Fail Dangerous</td>
<td>Failure that does not respond to a demand from the process (i.e. being unable to go to the fail-safe state).</td>
</tr>
<tr>
<td>Fail Dangerous Detected</td>
<td>Failure that is dangerous but is detected as part of partial valve stroke testing.</td>
</tr>
<tr>
<td>Fail Dangerous Undetected</td>
<td>Failure that is dangerous and that is not detected as part of partial valve stroke testing.</td>
</tr>
<tr>
<td>Fail No Effect</td>
<td>Failure of a component that is part of the safety function but that has no effect on the safety function.</td>
</tr>
<tr>
<td>Fail Safe</td>
<td>Failure that causes the valve to go to the defined fail-safe state without a demand from the process.</td>
</tr>
<tr>
<td>FMEDA</td>
<td>Failure Modes, Effects and Diagnostics Analysis.</td>
</tr>
<tr>
<td>Functional safety</td>
<td>Part of the overall safety relating to the process and the BPCS which depends on the correct functioning of the SIS and other protection layers.</td>
</tr>
<tr>
<td>HFT</td>
<td>Hardware Fault Tolerance.</td>
</tr>
<tr>
<td>Low demand</td>
<td>Mode of operation, where the frequency of demands for operation made on a safety-related system is no greater than twice the proof test frequency.</td>
</tr>
<tr>
<td>MOC</td>
<td>Management Of Change - specific procedures often done when performing any work activities in compliance with government regulatory authorities.</td>
</tr>
</tbody>
</table>
PFDAVG Average Probability of Failure on Demand.

PVST Partial Valve Stroke Test.

SFF Safe Failure Fraction - fraction of the overall random failure rate of a device that results in either a safe failure or a detected dangerous failure.

SIF Safety Instrumented Function - safety function with a specified SIL which is necessary to achieve functional safety. Typically a set of equipment intended to reduce the risk due to a specified hazard (a safety loop).

SIL Safety Integrity Level - discrete level (one out of four) for specifying the safety integrity requirements of the safety instrumented functions to be allocated to the safety instrumented systems. SIL 4 has the highest level of safety integrity; SIL 1 has the lowest.

SIS Safety Instrumented System - instrumented system used to implement on or more safety instrumented functions. An SIS is composed of any combination of sensor(s), logic solver(s), and final element(s).

1.4 Product Support & Service
Please refer to the contact information on the back cover of this document.

1.5 Related Documents
Hardware documents:
FCD NFENTB4167, Duball DL Ball ValveDatasheet
NFENIM4167, Duball DL Maintenance and installation instructions
Guidelines/References:
FMEDA report - NAF 14/05-134 R001

1.6 Reference standards
IEC 60654-1:1993-02, second edition, Industrial-process measurement and control equipment – Operating conditions – Part 1: Climatic condition

2 Duball DL Ball Valve Description
NAF-Duball DL is a full-bore ball valve which is equally suitable for isolation, on/off and modulating control applications. The NAF-Duball DL is supplied as standard in stainless steel or carbon steel but is also available in other materials e.g. Duplex, titanium, etc.
The NAF-Duball DL is the 4th generation of the Duball family, one of the most proven ball valve designs in the industry.
The valve has:
- A spring loaded stem seal packing that provides long, maintenance-free and safe operation in automated on/off and control service.
- direct actuator mounting capabilities of the NAF-Turnex actuator which provides a high performance, vibration resistant, compact valve package.
- a sturdy, blowout-proof stem with a long foot providing a high torque transmission with a minimum mechanical backlash.
- a floating ball that provides bidirectional tightness.
- the unique Z-trim option that minimizes cavitation and noise and has an excellent control characteristic.
- an extensive size range, DN 25–400, size 1”–16”.
3 Designing a SIF Using the Duball DL Ball Valve

3.1 Safety Function
The safety function for the valve and the additional components in the subsystem is to move the valve to the safe position (which can be either open or closed as required by the application) within the specified safety time when the system is tripped.

3.2 Environmental limits
The designer of the SIF must check that the product is rated for use within the expected environmental limits, maximum working pressure and temperature. Refer to the Duball DL Ball Valve datasheet for this information.

3.3 Application limits
The materials of construction of a Duball DL Ball Valve are specified in the Duball DL Ball Valve datasheet. It is especially important that the designer of the SIF checks for material compatibility considering on-site chemical contaminants and air/hydraulic (as appropriate) supply conditions. If the Duball DL Ball Valve is used outside the application limits or with incompatible materials, the reliability data and predicted SIL capability becomes invalid.

3.4 Design Verification
A detailed Failure Modes, Effects and Diagnostics Analysis (FMEDA) report is available from NAF Control Valves for this product. This report details all failure rates and failure modes as well as expected lifetime of the product.

3.5 SIL Capability

3.5.1 Systematic Integrity

The Duball DL Ball Valve has met manufacturer design process requirements of Safety Integrity Level (SIL) 3. These are intended to achieve sufficient integrity against systematic errors of design by the manufacturer. A Safety Instrumented Function (SIF) designed with this product must not be used at a SIL higher than the statement without “prior use” justification by the end user, or verification of diverse technology in the design.
3.5.2 Random Integrity
According to IEC 61508 the architectural constraints of an element must be determined. This can be done by following
the 1H approach according to 7.4.4.2 of IEC 61508 or the 2H approach according to 7.4.4.3 of IEC 61508.
The 1H approach involves calculating the SFF for the entire element.
The 2H approach involves assessment of the reliability data for the entire element according to 7.4.4.3.3 of IEC 61508.
The Duball DL Valve is classified as a device that is part of a Type A element according to IEC 61508, having a hardware
fault tolerance of 0.
The Duball DL Valve can be classified as a 2H device when the failure rates listed in the FMEDA report are used for the
Design Verification calculations. When 2H data is used for all of the devices in an element, then the element meets the
hardware architectural constraints up to SIL 2 at HFT=0 (or SIL 3 @ HFT=1) per Route 2H. If Route 2H is not applicable
for the entire final element, the architectural constraints will need to be evaluated per Route 1H.
When the final element assembly consists of several components additional to Duball DL Ball Valve, the SIL must be
verified for the entire assembly using the failure rates of all components. This analysis must account for architectural
constraints by comparing both SFF and HFT with IEC61508-2, Table 2 if following Route 1H.

3.5.3 Safety Parameters
For detailed failure rate information refer to the FMEDA report for the Duball DL Ball Valve.

3.6 Connection of the Duball DL Ball Valve to the SIS Logic Solver
The Duball DL Valve should be assembled with an actuator and logic solver where all components are safety rated. The
safety rated logic solver shall actively perform the safety function as well as automatic diagnostics (if any) designed to
diagnose potentially dangerous failures within the Duball DL Ball Valve, (i.e. partial valve stroke test).

3.7 General Requirements
The system and function response time shall be less than the process safety time. The Duball DL Ball Valve will move to
its defined safe state in less than this time with relation to the specific hazard scenario.
All SIS components including the Duball DL Ball Valve must be operational before process start-up.
The User shall verify that the Duball DL Ball Valve is suitable for use in safety applications by confirming the Duball DL
Ball Valve nameplate and model number is properly marked.
Personnel performing maintenance and testing on the Duball DL Ball Valve shall first be assessed as being competent to
do so.
Results from periodic proof tests and partial valve stroke tests (if any) shall be recorded and periodically reviewed.
The Duball DL Ball Valve shall not be operated beyond the useful lifetime as listed in paragraph 5.3 without undergoing
overhaul or replacement.

4 Installation & Commissioning

4.1 Installation
The Duball DL Ball Valve must be installed per the standard practices outlined in the Maintenance and Installation Instructions.
The environment must be checked to verify that environmental conditions do not exceed the ratings.
Duball DL Ball Valve must be accessible for physical inspection.

4.2 Physical location and placement
The Duball DL Ball Valve shall be accessible with sufficient room for pneumatic connections to the actuator and shall
allow for manual proof testing to take place.
The Duball DL Ball Valve shall be mounted in a low vibration environment. If excessive vibration can be expected then
special precautions shall be taken to ensure the integrity of pneumatic connectors or the vibration should be reduced
using appropriate damping mounts.

4.3 Pneumatic Connections
Pneumatic piping to the valve actuator shall be kept as short and straight as possible to minimize airflow restrictions and
potential clogging. Long or kinked pneumatic tubes may also increase valve closure time.
Only dry instrument air filtered to 50 micron level or better shall be used.
The process air pressure shall meet the requirements set forth in the actuator installation manual.
The process air capacity shall be sufficient to move the valve within the required time.
5 Operation & Maintenance

5.1 Proof Test requirement
During operation, a low demand mode SIF must be proof tested. The objective of proof testing is to detect failures within the equipment in the SIF that are not detected by any automatic diagnostics of the system. Of main concern are undetected failures that prevent the SIF from performing its function. Periodic proof tests shall take place at the frequency (or interval) defined by a SIL verification calculation. The proof tests must be performed more frequently than (or as frequently as) specified in the SIL verification calculation in order to maintain the required safety integrity of the overall SIF. Results from periodic proof tests and partial valve stroke tests (if any) shall be recorded and periodically reviewed. For detailed Proof Test information refer to the FMEDA report for the Duball DL Ball Valve.

5.2 Repair and replacement
Repair procedures outlined in the Maintenance and Installation Instructions must be followed.

5.3 Useful life
Based on general field failure data and a low demand mode of operation, a useful life period of approximately 10 to 15 years is expected for the Duball DL Ball Valve. For high demand mode applications, the useful lifetime of the mechanical parts is limited by the number of cycles. The useful lifetime of the mechanical parts is > 10,000 full scale cycles or 8 to 10 years, whichever results in the shortest lifetime.

5.4 Notification of failures
In case of malfunction of the system or SIF, the Duball DL Ball Valve shall be put out of operation and the process shall be kept in a safe state by other measures. NAF AB must be informed when the Duball DL Ball Valve is required to be replaced due to failure. The occurred failure shall be documented and reported to Flowserve NAF representative or directly to NAF AB using the contact details on the back cover of this safety manual.
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