ANALYSIS OF THE ENGINEERING DESIGN PROCESS IN AN INDUSTRIAL CONTEXT

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SUMMARY

This dissertation is concerned with the process of engineering design, and the development of ways to improve design quality in industry through more effective management of design activities.

A review of the literature suggests that the way in which needs and ideas are converted into information for manufacturing products and technical systems is not yet fully understood, despite a long history of innovative engineering design in industry. Better understanding of what happens in practice is needed. Participant observation of actual engineering design projects, where the researcher takes an active part, records what happens and analyses the field data collected, is a recommended research approach.

The participant observation of an engineering design project involving the design of a high-pressure, high-temperature system for testing materials in a simulated coal gasification environment is described. A systematic approach was used to structure the design work, and all activities were recorded during the 2.8-year project. In total 1180 pages of field notes, 76 hours of tape-recordings, 116 weekly reports and 6 design reports were accumulated. These covered 1373 separate events or 'interchanges', and detailed the 2368 hours of project effort. 'Interchange data sheets' were compiled for each of the 37 participants, and the 2488 coded records were entered into a computer for sorting and categorizing. The reduced data resulting from this is analysed both quantitatively and qualitatively in terms of the engineering design process.

To clarify the context within which the project took place and to help structure the analysis, a Context Model is described. It represents the phases of the engineering design process in terms of its 'activities' and 'outputs', set in context within the Project, within the Company, within the Market, and within the Environment. The quantitative analysis shows that the engineering design process may be characterized by a set of overlapping phases, each consisting of a particular mix of procedural steps and other general activities. A comparison between the 'phase diagram' of design effort and an 'ideal' diagram indicates ways of assessing progress and identifying problems during an engineering design project. The design 'activities' observed during the project are compared with the procedural design steps referred to in the literature, and six general activities are added. The design 'techniques' used during the project are compared with those suggested in the literature, and thirteen working, communicating and motivating techniques are added. Theoretical and observed design outputs are compared. Work 'type', work location and team 'mood' are discussed.

A tentative list of 103 factors likely to influence the engineering design process is generated from the literature, divided into 20 categories of influence at five levels of resolution. The impact of each factor on the project is assessed. An attempt is also made to assess the effectiveness and efficiency of the design process and the success of the project.

Several recommendations for further research are made, including: the use of phase diagrams; comparative studies of the observed 'activities' and 'techniques' for different projects; assessment of design process outputs; and development of a design terminology acceptable to related disciplines.

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PREFACE TO FIRST EDITION

This dissertation was submitted to the University of Cambridge in January 1987 and is the result of work completed in the Cambridge University Engineering Department between October 1982 and October 1986. It is published here in its original form, complete with all the appendices. One or two minor changes have been made to improve clarity.

In 1981, when Ken Wallace and I first discussed the possibility of such a design research project, there was still a certain air of scepticism over what could be achieved by observing a single engineering design project in industry and analysing the data collected. We were not sure of what lay ahead but it seemed an ideal opportunity to confront some of the issues we had found to be important in engineering design over the years. It also seemed that in order to try and find out more about the engineering design project. It is heartening to note the great change in attitude which has come about since those days. There has been a renewed appreciation of the importance of engineering design and its management in industry, with a realization that we do indeed need to know more about the design process in practice if we are to improve the way it is carried out. Reports have been written and design initiatives set up in a number of countries calling for more research into the engineering design process. These are to be welcomed and supported but in the end it will fall to individual researchers to do the job, and it is not an easy task.

The thesis has been published to make available to researchers some of the results obtained and experiences encountered when analysing field data collected from an engineering design project in industry. The structure of the thesis is simple: a quantitative analysis followed by a qualitative analysis. Supporting this is an extensive and categorized bibliography and a series of appendices which provide further details of the project. In particular a complete summary database is included for researchers who may wish to analyse the same data from a different viewpoint. A brief case history details the technical aspects of the engineering design work and the field research and data reduction methods are discussed in further appendices. For those about to begin their own design research perhaps the thesis offers a foundation to build on and the encouragement to see it through. I certainly hope so.

Crispin Hales Cambridge October 1987

PREFACE TO SECOND EDITION

In the four years since the first edition, engineering design research has become more established worldwide, two international journals have been started and a great many papers have been published. However, there is still very little detailed data available from design projects in industry. Without data from a variety of different types of projects it will be difficult for design researchers to develop criteria for assessing the benefits or otherwise of proposed approaches to design. For anyone who is interested, the database from the Gasifier Test Rig project is available in DOS or Macintosh format at nominal cost. More copies of the dissertation were needed to satisfy a small but continuing demand and it was felt that the quality should be improved by changing the typeface and some of the layout. This has been done with the help of Lynn Wallace-Mills in the Graphics Department at Triodyne Inc., and her input is greatly appreciated.

Crispin Hales Chicago April 1991

CHAPTER 1

INTRODUCTION AND BACKGROUND

1.1 Introduction

Through the process of engineering design, ideas and needs are converted to the information from which technical systems and products can be made. It is fundamental to all manufacturing industries, it involves complicated factors, changing expectations and the effect of indirect influences, and its effectiveness is difficult to assess. Two critical issues are the *quality of designs produced* and the *management of design activities*. The failure of the Space Shuttle Challenger provides a tragic reminder of what can happen when insufficient attention is paid to these two issues. In its accident report the Presidential Commission was forthright (A25):

"...the cause of the Challenger accident was the failure of the pressure seal in the aft field joint of the right Solid Rocket Motor. The failure was due to a faulty design unacceptably sensitive to a number of factors." (Conclusion: p.72)

"The decision to launch the Challenger was flawed. Those who made that decision were unaware of the recent history of problems concerning the O-rings and the joint and were unaware of the initial written recommendation of the contractor advising against the launch at temperatures below 53 degrees Fahrenheit and the continuing opposition of the engineers at Thiokol after the management reversed its position. They did not have a clear understanding of Rockwell's concern that it was not safe to launch because of ice on the pad. If the decisionmakers had known all of the facts, it is highly unlikely that they would have decided to launch 51-L on January 28, 1986." (The Contributing Cause of the Accident: p.82)

Commissioned reports such as this invariably call for better understanding of the engineering design process as a first step towards producing higher quality designs through more effective design management. In Britain, the concerns first raised in the 1850's (A7) were defined in the 1963 Feilden Report for the Council for Scientific and Industrial Research (A1):

"Britain's share of international trade in engineering goods has been declining. In spite of some notable successes, too many British products are being outclassed in performance, reliability and sales appeal."

"Design ... determines most and affects all of these factors and is therefore of paramount importance."

"There is evidence that the importance of design is not sufficiently appreciated by the managements of engineering businesses."

"... it is the responsibility of management to see that the design team work as a unit and that the customers' requirements are fully understood and properly interpreted. In design everything matters."

Thirteen years later the 1976 Moulton Report (A2) on educating engineering designers included the statements:

"The Feilden Report, published more than ten years ago, considered the standards of engineering design obtaining at that time."

"Subsequent reports, notably by the Mechanical Engineering Economic Development Committee have shown no signs that these trends have been halted."

In 1979 the Corfield Report on Product Design (A3) echoed earlier reports:

"British industry is criticised for the poor design of many of its products and this report has illustrated the vital need for improved designs in them if this nation is to survive industrially."

Then the 1983 Lickley Report to the Engineering Board of the Science and Engineering Research Council (A4) added:

"... there is need for a more coherent body of scholarship and knowledge in engineering design."

From the 1984 CNAA report on managing design (A5) came disturbing news:

"Many United Kingdom companies now face their final opportunity to get to grips with design before their markets are dominated forever by foreign competitors who *have* learnt how to exploit design."

In the same year the issues were summarized for the British Government in a Strategy Group Report (A6) which supported action as recommended in the previous reports. A need for better understanding and management of the engineering design process was emphasized. The concern over understanding the engineering design process is not confined to Britain but the emphasis is different in other countries. For example in the United States and in Japan there is great interest in 'expert systems' for engineering design (B17, B41 & B62). In the U.S.A. a National Science Foundation study on research needs (A8) concluded that:

"Research is needed to understand the conceptual process of design and to integrate and expand the capabilities of computers to aid in this creative process."

To gain a better understanding of the engineering design process in actual practice it must be studied in its industrial and commercial context. As the process output is engineering information, rather than a more tangible product, and the concern is with both the quality of this output and the human activities which produce it, such studies are complex. They demand the use of social science field research techniques for collecting data, and practical experience of engineering design for interpreting results. Few of the studies reported in the literature have resulted in more than a descriptive analysis, and they have led only to marginal improvements in our understanding of what actually happens. As a result the practical benefits for design engineers in industry have been limited, and the call for further research has become increasingly urgent.

The aims of this study were twofold. Firstly, to try and collect detailed data on the activities and outputs during an engineering design project, and secondly, to develop techniques for analysing the data and presenting the results in a more meaningful way. This thesis is based on the results of a study carried out on a single engineering design project in industry; one involving 37 people and the design of a materials testing facility to operate continuously for periods of up to 1000 hours at high temperatures and pressures. A quantitative analysis of the field data accumulated is presented in Chapter 2, and a complementary qualitative analysis of the same data is presented in Chapter 3. Conclusions are drawn and possible applications discussed in Chapter 4, and a number of specific areas for further investigation are recommended in Chapter 5. Detailed Appendices provide supporting evidence and information. Appendix A provides a full set of data together with the project case history and summaries of the six design reports. Appendix B provides a referenced discussion on field research issues, together with a commentary on the fieldwork for this study, and Appendix C provides details of the techniques developed for reducing and analysing the data.

1.2 Engineering Design in Industry

The nature and meaning of engineering design differs according to context. Much has been written on the subject but it is widely dispersed within a variety of disciplines and coherent patterns of thought are difficult to extract. Texts such as those of P.J. Wallace (B70), Asimow (B8), Matousek (B40), Alger and Hayes (B1), Glegg (B26), French (B24), Hubka (B31) and Pahl and Beitz (B47) provide some insight into design practice in industry through technical examples. Collections of case histories, such as those of Whyte (A27, A28), and papers on design projects, such as Ackroyd (A10), Griffin (A15), Hales, Howes and Bhattacharyya (A16) and Horsley (A18), describe real situations in more detail. Biographical and documentary texts with popular appeal, like those of Majdalany (A22), Masefield (A23), Prebble (A24) and Rolt (A26), give accounts of major engineering design ventures set in the context of their times. Historical perspectives are sharpened by documentary studies on particular aspects of design such as those of Booker (A11) and Farr (A13).

Empirical research has helped to clarify some of the issues involved. In 1979 Gregory listed some thirty observation-based studies (C10) considered to provide the "...prime

material upon which development of our knowledge about designing can be founded," and those of Marples, Hykin and Bessant and McMahon are of particular interest here:

- (i) Marples (C21) described two case histories from industry, analysing them using his 'Decision Tree' approach, which highlights decision-making aspects of the engineering design process. The approach has since been developed by others. For example Tebay, Atherton and Wearne (C31) analysed the decisions made during the course of three design projects and used the data to test existing decision theory. They concluded that while simple quantitative techniques can be useful for handling uncertainty there are time and cost penalties, measurement problems and the often overiding effects of external influences. The value of decision theory was felt to be in helping promote a better understanding of the engineering design process rather than in formulating "...a model of design decision."
- (ii) Hykin (C13) observed eleven engineering design projects in industry during the period 1966-1972. Some of the variables and influences involved were identified, and an attempt to measure and categorize these was made. The dominant variable identified was 'production quantity', and so for this study the engineering design process was seen to depend heavily on whether mass production or a 'one-off' exercise was involved [Hykin and Laming (C14)].
- (iii) Bessant and McMahon (C4) describe the participant-observation of a major engineering design decision, taken over four years. In their opinion the "...task of theory-building must be to convert specific high-variety empirical information into concepts which are generalizeable and capable of application to different situations with some predictive validity." They see a shift away from prescriptive theories of design (specifying how to do design) towards obtaining empirical evidence for developing more adaptive theoretical models which admit "...multiple iterations, recycles, recursion and other dynamic behaviours." In summary they advocate three changes:

Research methodology away from quantitative and mechanistic studies towards case studies and hybrid qualitative/quantitative analyses;

Theoretical frameworks away from forcing a general theory around increasingly varied empirical data and towards contingency models;

Design practice away from prescriptive approaches more towards ones based on appropriateness and applicability.

These three studies, supported by Gregory's own observations, suggest that the use of participant observation for the collection of empirical case history data, and the development of flexible and adaptive models which take account of the dynamic nature of the engineering design activity (contingency models) are needed for our improved understanding of the engineering design process. As discussed in Appendix B, there exists a 'spectrum' of observational field research techniques, ranging from direct observation where the researcher takes no part in the activites to 'action research' where the researcher not only takes an active part but actually determines how the activities to be observed will be carried out. If the aim is to increase the understanding of what happens in practice, rather than experimenting with new ways of working, then a less directive role than for action research is needed by the researcher, but on the other hand, as Thomas and Caroll conclude (C32), more researcher involvement is needed in design studies than straight observation. A compromise is in the use of participant observation, where the researcher takes an active part in the activities being observed but tries not to influence the outcome more than would be expected from any other participant.

Since Gregory's survey other observation-based studies have been reported including Lera (C15, C16), and Roy, Walker and Walsh (C26) in Britain; Bucciarelli (C5) and Nadler and Peterson (C22) in the U.S.A.; Wiendahl (C35) in Germany; and Lewis (C18) in Australia. The role of such studies in improving the effectiveness of the engineering design process is emphasized by Chatterton and Leonard (A12), Kardos and Smith (A20), Eder (B19) and Topalian (D19), but there is little guidance on how further analysis could best be carried out or coordinated.

1.3 Design Methods and Models

Many design 'methods' and 'methodologies' have been developed, together with conceptual models, as techniques or aids for use in the activities of the engineering design process (B30). For this thesis a design 'method' will be taken to mean 'a prescriptive programme of action describing the way to solve more than one problem' and a design 'methodology' as 'a prescribed procedure containing at least two methods and information on their use'. Early developments were based on technical viewpoints which omitted many influences now regarded as important and the approaches used varied with geographical area. Eder (B18) argues that this stemmed from cultural and historical differences between countries. In Britain the emphasis was on conceptual design, in other European countries (notably Germany) it was more on embodiment and detail design, and in North America on a systems or management approach. Despite these differences, cross-referencing in the literature is common. Archer (B3, B4), Asimow (B8), Dixon (B16), French (B24), Glegg (B26), Gregory (B27), Hubka

(B31), Jones (B36), Krick (B38), Marples (C21), Matchett (B39), Matousek (B40), Rodenacker (B55), Roth (B56) and Wallace (B70) to name but a few, are commonly referred to in publications on design methods and models.

Bishop (B10) reviewed the available design methods or techniques in 1972. Turner (B64) broadened this in 1975, and Finkelstein and Finkelstein (B23) comprehensively reviewed existing design 'methodologies' in 1983. They concluded that design methodology "...provides a useful framework for the structuring of the design process, the generation of design concepts and for evaluation in design," and that the design process in general could be described as:

"...a sequence of stages starting from the perception of a need and terminating in a final firm description of a particular design configuration. Each stage is in itself a design process and is an iterative sequence of steps."

These stages were commonly referred to as: 'Need'; 'Problem Definition'; 'Conceptual Design' and 'Detail Design', with 'Manufacture' and 'User' put in if a complete product cycle was shown. This simple 'core model', such as the one used by French (B24) and reproduced in Appendix D, was central to the early developments. It was generally accepted that information processing was involved, with a progressive transformation of the abstract into the concrete during the course of the design process as described and modelled by Gill (B25). Finkelstein and Finkelstein found that up to the time of their review there had been no successful attempt to synthesize management and design methodology, and that much more accurate analyses of the design process were needed, to help the manager control the activities and resources more effectively.

In the U.S.A. Asimow (B8) and Woodson (B72), followed by others such as Nadler (B44) and Suireg (B61), developed models which better represented the full life cycle of a product. Ostrofsky's approach (B46) is perhaps typical of these. His 'design morphology', or chronologically structured decision sequence, is intended to aid the 'designer-planner' in efficient use of resources and is divided into three main phases: Feasibility Study; Preliminary Activities; and Detail Activities. Then come the four stages of: 'Production'; 'Distribution'; 'Consumption' and 'Retirement'; with an implied return loop to complete the 'Production-Consumption' cycle [See Appendix D]. Meanwhile in other countries, particularly in Germany, the approach was to refine the 'core model' by adding intermediate steps within each stage or 'phase', to provide the design engineer with a well-structured procedure and help in applying available design techniques. The Pahl and Beitz approach (B47) is one of the most comprehensive, with a set of secondary models and design guidelines which have evolved from years of European development. [See Appendix D]. These form the basis for German Standards such as VDI 2221 (B65) and VDI 2235 (B66), as reported by Gregory (B28).

Hubka (B32), Eder (B20) and others who have been working independently towards similar goals generally support this initiative.

In Britain there was growing interest in the human 'engineering design activity' during the 1970's and the modelling reflected this. An example is the 'design activity model' of Pugh and Smith (B54) [Appendix D] which was developed to help structure a postgraduate engineering design course and has since been adapted for use on an Open University distance learning course (B49). The model represents an 'iterative central core activity' (market : specification : concept : detail : manufacture : sell), within the design boundary of an evolving specification. "The whole of this activity is carried out under an umbrella of planning, organization and control..." (B52). This model is rather more flexible and adaptable than earlier ones and Pugh has used it, for example, to illustrate the way he differentiates between what he sees as 'static' and 'dynamic' concepts in design (B53). Ehrlenspiel's three-dimensional model (B22) [Appendix D] combines the type of framework used by Pugh and Smith with the detail of the Pahl and Beitz approach, and this has been used by Rutz (C28), for example, in structuring a study on problem-solving in engineering design.

The 1960's optimism over use of prescriptive systematic design methods and models faded to what Cross terms a 'descriptive mood' in the 1970's (B15):

"It soon became realized, however, that design problems were not so amenable to systematization as had been hoped. Attention turned to trying to understand the apparent complexity of these particular kinds of problems."

Resulting debates helped to broaden traditional views [Jaques (B35)]. For example Jones, originally a strong advocate of systematic design methods, rejected it all in favour of a more fluid approach without formal models (B37). Matchett (B39) with his Fundamental Design Method (FDM), Rzevski (B57) with his Evolutionary Design Methodology (EDM) and Schregenberger (B58, B59) with his Programme for Methodical Conscious Problem-solvers (PMP) regard the engineering design process as a special case of general 'problem-solving' and have developed models accordingly. Archer (B6), Tovey (B63) and Cross (B14) have been concerned with modelling the thought processes of designers, which complements the work of Dixon and Simmons (B17), Whitefield (C36) and others whose models of designer activities are aimed at helping develop computer based methods. Increasingly a holistic 'systems' approach is taken, such as M'Pherson's System Design Methodology and 'spiral' model (B42). In Britain it seems that systems approaches, which came originally from engineering in the form of operations research, are finding their way into design not so much from engineering as through the approach developed by Checkland (B13) and others for more general use in management and organizational behaviour.

7

In 1979 Gregory proposed a hierarchical type of structure for engineering design activity models (C10), and this was developed by Bessant (C3) who suggested the use of nested levels (See Appendix D). Others, including Andreasen (B2, B29), Archer (B6), Eekels (B21) and Peters (B50), have used similar structures for their most recent models. These systems models all feature a series of hierarchical levels rather similar to those suggested by Bessant though what is meant by 'level' is not often clear. 'System' levels; 'perception' levels; 'organization' levels; and 'process' levels are all commonly referred to. Examples of this modelling approach were looked for in other disciplines. Fields linking 19 relevant disciplines were mapped and more than 100 people were visited to build up a network of useful ideas. Four complementary references based on a 'systems' approach were of particular value: Checkland (B13); Wilson (B71); Carter, Martin, Mayblin & Munday (B12); and Humphreys (B33, B34).

Checkland's 'Systems Methodology' was developed for modelling what he has termed 'Human Activity Systems', rather than 'Designed Systems', 'Natural Systems', or 'Social and Cultural Systems'. His concern is with the way people do things rather than the technical systems or products they make, the natural world around them or the communities in which they live. If designed or technical systems are considered as 'hard' systems, modelled in engineering terms as described by Calladine (B11), then in the spectrum from 'hard' to 'soft', human activity and management systems are at the 'soft' end, modelled in human activity terms as described by Checkland. To model the engineering design process, which involves a mixture of the hard and the soft, varying in proportions according to the type of design task, an approach is needed which adequately represents both 'hard' and 'soft' systems. Systems methodology thus offers useful techniques for modelling the aspects of the engineering design process which have tended to be left out of models based solely on hard engineering.

Use of systems methodology is described by Wilson, the concept of 'levels' and 'viewpoints' being the key: "...a system is, at the same time, a sub-system of some wider system and is itself a wider system to its subsystem. What we define to be 'a system' is a choice of resolution level or the choice of level of detail at which we wish to describe the activities." Unlike 'designed systems', human activity systems are not considered to exist. What exist are perceptions of human activity systems in the minds of observers. An analyst developing a human activity system model is not trying to describe what exists, but a view of what exists, and the aim is to try and model the same situation from several appropriate viewpoints. Humphreys uses resolution levels as 'levels of abstraction' when modelling decision problems, and considers that what is represented as 'form' at one level is manipulated as 'content' at the next level higher. He adds that:

"... a person must be fully conversant with the operations used at the first level, so that the pattern of principles underlying these operations ... can itself be used as an operator at the next level."

Carter et al. describe the systems approach using diagrams and pictures. The notion of 'weltanschauung' (W) or 'world-view' (individual viewpoint) is clarified. This is central to the modelling of human activity systems and according to Wilson is "...that view of the world which enables each observer to attribute meaning to what is observed." He uses the analogy of 'W' being a filter through which events are observed, the filter being continually moulded by experience, politics, society and the situation.

1.4 Summary and Review

There is a need for higher quality engineering design and more effective management of the engineering design process in industry. To achieve this it is first necessary to gain a better understanding of the engineering design process in practice, which calls for more accurate analyses of what actually happens as distinct from what is presumed to happen. This is supported by the main conclusion of the 1983 Lickley Report (A4):

"The fundamental requirement is a directed and practical programme of work, continuing over a long period, to establish design as the integrating theme of all engineering disciplines and to improve the general quality of engineering design."

More specific research needs are made clear in *Managing Design* (A5):

"Priorities for research into the management of design include international comparisons of design performance, case studies of design management practice... greater understanding of the tasks that designers perform and what is involved in design work..." "Some idea of the typical 'productivity' of designers could be useful ... research into designers' activities ... does not appear to have been carried out on anything like the scale of research into managers' activities."

Similar conclusions from the National Science Foundation study on research needs in the U.S.A. led to the 1985 NSF workshop (A9) on design theory and methodology, to help define: "...a multidisciplinary research program that can provide a better understanding of the theory and methodology underlying the design process as practiced by the most productive engineers and scientists in all disciplines." Nadler summarizes the issues (B45).

In review it appears that:

(i) Despite a long history of innovative engineering design in industry and the development of many prescriptive methods and models, the engineering

design process is not yet considered well understood or adequately exploited in practice.

- (ii) There is a mismatch between the design process as it is currently modelled in theory and what actually happens in practice.
- (iii) There is strong support for research aimed at developing a basic understanding of the engineering design process and improving its effectiveness in practice.
- (iv) Participant observation of design projects in industry is advocated as a way of gathering suitable empirical field data for analysis.
- (v) Development of hybrid quantitative/qualitative approaches for the analysis of empirical data is recommended for design research.
- (vi) Development is needed of contingency models, having multiple levels of resolution and capable of representing the human activities in engineering design as well as the resulting design output.

1.5 Research Objectives

The overall research objectives for this study were:

- (i) To conduct a detailed study of an engineering design project in industry, gathering field data by means of participant observation.
- (ii) To develop techniques for analysing the data with reference to an appropriate model, and to draw conclusions which could help towards better understanding of the engineering design process in practice.
- (iii) To identify further work likely to lead to improved engineering design and more effective design management in industry.

These objectives raised a series of questions, such as:

- (i) What defines the 'engineering design process' within a project?
- (ii) Which design procedures and techniques are useful in practice?
- (iii) To what extent are they actually used?
- (iv) What is the nature of the mismatch between 'theory and practice'?
- (v) How are 'effectiveness', 'efficiency' and 'success' defined?
- (vi) How can 'effectiveness', 'efficiency' and 'success' be assessed?
- (vii) What factors influence effectiveness, efficiency and success?

- (viii) Which model of the engineering design process should be used?
- (ix) What design project should be chosen, who should be involved and which design procedures should be used, if any?
- (x) What data should be collected, in what form and for how long?
- (xi) How should the data be analysed; what results might be expected?
- (xii) What conclusions are likely and might generalizations be possible?

Preliminary answers to some of the questions could be found by reference to relevant literature, other questions were answered during the course of the field research, but many, and in particular the last two, could not be addressed until the data had been gathered, reduced and scanned. Those initially addressed by reference to the literature are treated in the remainder of this chapter. Chapter 2 covers quantitative aspects, while Chapter 3 covers qualitative aspects. Questions regarding the field study are covered in the Appendices: those on the design project in Appendix A; those on the data gathering in Appendix B; and those on data reduction in Appendix C. Questions needing more investigation, including new ones arising from the research, are discussed in Chapter 5 on future research.

1.6 Terminology

The question of terminology was found to be a serious problem, and not one which could be adequately addressed here. Many engineering design terms vary in meaning according to discipline, context and interpretation. For example 'design', 'engineering design' and 'engineering design process' are defined according to individual viewpoints. In the Feilden Report (A1) engineering design was defined as: "...use of scientific principles, technical information and imagination in the definition of a mechanical structure, machine or system to perform pre-specified functions with the maximum economy and efficiency." Other definitions have been suggested by numerous people including Archer (B5, B7), Holt (A45), Luckman (C19), Lickley (A4), Rzevski (B57), Thomas and Carroll (C32), Topalian (D19) and Wallace (B67). Oakley gathered together a crossection of contemporary views in the CNAA Report (A5). Although the Feilden definition remains popular [Leech and Turner (A38)], the tendency is for simpler and more commercially relevant ones to be used such as:

"Engineering design is the process of converting an idea or market need into the detailed information from which a product or system can be produced." [Wallace (B69)].

This, in conjunction with Finkelstein and Finkelstein's description of the 'engineering design process' (B23) as a goal-orientated sequence of stages within each of which is an iterative series of steps, provides an adequate definition for this thesis.

In addition to interdisciplinary terminology problems there are those of translation from language to language and in meaning from one country to another [Eder (B18), Wallace (B68)]. Hubka made a valuable contribution with WDK-3 (E8), a multilingual glossary of terms for engineering design, and Eder provides a translated glossary (E9) in Hubka (B31). Humphreys' finding that language barriers are more difficult to overcome across resolution levels than across cultural or national differences (B34) suggests an area needing further investigation. Schregenberger (B59) has come to the conclusion that design engineers must adapt to the terminology accepted in the social sciences as it is unlikely that this terminology would ever be changed to suit design engineers.

To overcome the problems of terminology, which are not the main concern of this thesis, it was decided that simple terms having generally accepted meanings would be used wherever possible and that the number of terms used would be minimized. This was not easy, and for certain terms additional notes have been needed where they first appear. When 'design' is used it refers to 'engineering design' unless otherwise stated, and both terms are occasionally used to refer to the 'field' of enquiry or of practice. 'Design engineer', 'engineering designer' and 'designer' have been treated as synonomous but 'design engineer' is preferred. The glossaries referred to during this research are listed in Section E of the References.

1.7 Effectiveness, Efficiency and Success

"Efficiency is about doing things right; Effectiveness is about doing the right thing." [Barnato (A29)].

Prescriptions for how to improve the 'effectiveness' and 'efficiency' of the engineering design process abound, but definition and assessment proves difficult. Muster and Mistree (B43) offer definitions which allow certain assessments to be made, but valid only for their very specific viewpoint. Little (A40) concluded from a review of organization theory:

"It is generally accepted that 'effectiveness' implies a wider assessment of all aspects of performance than 'efficiency'. The criteria for such assessment, however, are subject to considerable debate."

Malouin and Landry (A41) suggest a definition for efficiency:

"A system is efficient when it does well what it does. Efficiency is the result of a relationship between the input and the output of a system."

'Effectiveness' appears more difficult to define in a meaningful way. Johns (A37) in commenting on managerial effectiveness concludes:

"In an organizational setting, and for most practical purposes, managers can only perceive themselves as effective if they are seen to be effective in the judgment of others ... effectiveness is not something which can be determined internally, by introspection alone. Effectiveness depends crucially on evaluation by others."

Bennett and Langford (A30) expand on this:

"Any attempt to measure effectiveness must take account of the different kinds of organization and different levels in the hierarchy."

Nagar, Tenda and Singu (A43) studied 'group effectiveness', developing a multidimensional scaling method for its assessment. Hoy, Van Fleet and Yetley (A36) tested three organizational effectiveness models, concluding that the 'Pickle and Friedlander model' seemed to offer a comprehensive evaluation with measures apparently relating to the financial performance of the firm. Effectiveness is evaluated from seven viewpoints: the owner; the employees; the customers; the suppliers; the creditors; the community in general; and the government. All these approaches are complicated and require specialist knowledge. It seems accepted that effectiveness and efficiency are concerned with the quality and the rate of output from an activity and that they are dependent on viewpoint. However, the question of assessment remains open.

As the engineering design process is goal-orientated, degrees of 'success' (and 'failure') are important when assessing results. Oxford Dictionary definitions for 'success' include "favourable outcome, accomplishment of what was aimed at..." and, for 'failure', "lack of success; unsuccessful person, thing or attempt..." Assessment would seem to depend on when it was made and from whose viewpoint. Consider Professor Heyman's apocryphal story of the passerby who asked four men breaking stones on a cathedral building site what they were doing. One said "building stores", one said "building a wall", one said "building a cathedral" and one said "building to the Glory of God." The relative success of each man's activity clearly depends on elapsed time and the assessor's viewpoint in this case!

In relation to the engineering design process perhaps 'success' could be assessed at the end of each phase in the process or, for that matter, at any other convenient point in the life cycle of a product. More difficult than elapsed time is the question of 'viewpoint'. One common one is the uncompromising commercial approach typified by Fox (A32):

"Success in business is generally measured in terms of net profit, which is a function of two factors: gross margin and volume. If both are right: success. If either or both are wrong: failure."

While this may be true from a manufacturer's viewpoint, Leech and Turner (A38) point out that from the design engineer's viewpoint "...success is not so easily defined

because he is not often in the position of selling his designs directly to a customer." In very small companies the design effort is more likely to be the work of a single individual and assessment may therefore appear to be simpler, but as Oakley (A44) discusses, success is so highly dependent on the available resources in small companies, that pinning down the success or otherwise of the engineering design effort may still be very difficult. Gardiner and Rothwell (A14) add the fact that customers themselves can play a major role in determining the degree of success of a product, and Turner (A48) suggests that in the end it is the responsibility of management, who should ensure that proper design reviews [Baker (B9)] are conducted at each stage of the work. For Project Sappho, a study on industrial innovation (A47), the view was:

"Since the project is concerned with innovation in industry the criterion of success is commercial. A 'failure' is an attempted innovation which fails to obtain a worthwhile market share and/or make a profit, even it if 'works' in a technical sense. Often a failure is relatively clear, e.g. a firm withdraws a product or closes a plant down, but success is not always so self-evident. A product may achieve a worldwide market but take a long time to show a profit. There are obviously varying shades of grey between the 'white' success and the 'black' failure..."

The main finding was that "...no single factor can by itself explain the success-failure difference." Legard (A39) also questions the validity of taking the profit-based viewpoint in assessing 'success'. Microcomputer industry patterns suggest that companies which rapidly become a commercial success with a popular product often fail to meet the demand created for a second-generation product. This is further complicated by the 'bulldozer' effect that large companies can exert on a market if they feel threatened.

Other questions arise. Kelly, in his historical study of Veloce Ltd (A21) supported the adage that "success begats success and the reverse is true." How true is this? The rapid swing from commercial failure to commercial success of Jaguar Cars (A19) resulted from changes in management style and attention to product quality, rather than from design improvements. How might the recognized success of the Jaguar design team's contribution over such a commercially turbulent period be assessed? Criteria for success of a process plant may be profit-based, but expensive tests on materials may be needed to ensure the plant's safe and economic operation. How should success as applied to the test equipment design engineer be assessed? It may be based on performance of the equipment within agreed estimated costs but could even be on technical performance in minimum time at *any* cost. A change in Government policy can also affect the success of projects for, like the TSR2 aircraft in Britain and coal gasification projects in the U.S.A., what was urgently required at one point in time may suddenly be made redundant at another. Radcliffe and Holt (A45) summarize the debate:

"The success or otherwise of a design is conditioned by the people who will use it, make it and maintain it, by the technology and facilities they have available and by their economic expectations and constraints."

Others suggest factors to be considered from specific viewpoints:

Economic Viewpoint	- market competitiveness or slackness [Grant (A33)].
Commercial Viewpoint	- company growth; market share; return on capital; profit [Gregory (A34), Rothwell et al. (A46)].
User Viewpoint	 psychological, ergonomic and technical criteria [Hay (A35)].
Project Viewpoint	- cost, time and technical criteria [Might and Fischer (A42), Woodward (A49), Pitts (B51)].
Design Viewpoint	- perceptual and objective measures [Edstrom (A31)]. Concept used; attitude improvement; skill development; commitment; productivity [Nadler (B44)].

It would seem that success is not only dependent on viewpoint but also on time-scale, and that it may perhaps be assessed on relative scales using a combination of measures from different levels of resolution. However the question is by no means satisfactorily answered.

1.8 Conclusions

- (i) There is a call for more effective engineering design management and practice in industry.
- (ii) To help meet this call a better understanding of the engineering design process in industry is needed.
- (iii) To improve understanding of the engineering design process more detailed studies of it are needed, set in its industrial context.
- (iv) Empirical data of analytical value must be gathered; participant observation of real engineering design projects is advocated.
- (v) Hybrid quantitative/qualitative approaches need developing for the analysis of empirical field data.
- (vi) Adaptable models with multiple levels of resolution are needed for representing the contingent, dynamic nature of engineering design.

- (vii) Terminology is a problem. A universally agreed terminology for design would be a great advantage.
- (viii) Assessments of effectiveness, efficiency and success are important but difficult issues, dependent on viewpoints and timescales.

CHAPTER 2

QUANTITATIVE ANALYSIS OF AN ENGINEERING DESIGN PROJECT

2.1 Introduction

To meet the first research objective, that of participating in an engineering design project in industry and observing the design process, a non-trivial project involving a variety of people within a company was needed, and one which would allow the collection of field data from first ideas to detail drawings within a two-year period. Establishing such a project and the necessary field research routine presented few problems, but reduction and subsequent analysis of the case history data, the second objective, proved far more difficult than anticipated. Analytical procedures had to be developed as well as a model to represent the design process set in the project's industrial and commercial context.

The chosen project was in fact observed for 2.8 years, during which it passed from the initial proposal through all phases of the design process to near completion of detail design. From task clarification through to detail design the procedures recommended by Pahl and Beitz (B48) were followed, for two reasons. Firstly the company was keen to try a more structured approach to their in-house design work than they had used for previous similar projects, and secondly it offered a framework for initial categorization of the field data. A total of 37 people were involved and 1373 'interchanges' were recorded, covering 2368 hours of work effort in time intervals down to 0.1 hour. As detailed in Appendix B.4 an interchange was considered to be any uniquely identifiable work effort, meeting or communication, each being recorded in terms of date, time, type, topic, location and people. The field data comprised 1180 pages of diary notes, 76 hours of audio tape-recordings, 116 weekly reports and 6 design reports including diagrams, sketches and drawings. Data was reduced by colour-coding the notes according to participant, compiling a set of data sheets for each person and entering the 2488 records into a computer database for indexing, sorting and grouping. Summary database files were translated into spreadsheet files for final numerical and graphical analysis.

Most processes, even ones involving human activities (e.g. the production process), may be analysed in terms of variables which can be measured. A problem with the engineering design process is that so few of the many variables can be objectively measured, and in fact the only simple measure is work effort in hours. From this costs may be derived, with a breakdown of who has put effort into the project, how much and at what stage, but the numbers alone are little help in understanding what actually happened. If however, the simple measurement of work effort in hours is enhanced by the addition of 'context' then a potentially far more meaningful analysis is possible. By context is meant what the work was, who it was done with, when it was done, where it was done, what techniques were used and what other factors were involved at the time. For this particular project the approach taken was to record the time taken for each interchange and as much other contextual information that the 'participant observer' could collect about each one.

In this chapter quantitative time and cost results are presented, after a brief overview of the project and a description of the context model used. Times are measured in hours to one decimal place and costs are calculated using the hourly rate of each person including overheads. Most results are given in terms of percentages, for comparative purposes. The concern is with characterization of the phases of the engineering design process within the overall project, identification of steps or activities within each phase, and the identification of design-related techniques used. A simple way of characterizing and monitoring design projects by phase is proposed. Measured results are compared directly with some work effort percentages estimated by Pahl and Beitz, and a number of activities and design techniques are identified which are not taken into account by the Pahl and Beitz model of the design process. Breakdown of work effort by type, location, participant group and mood is also given, but the more qualitative aspects of these are discussed in Chapter 3, together with other influences observed to affect the engineering design process.

A full set of coded interchange data is given in Appendix A.1, the project case history is detailed in Appendix A.2, and summaries of the six design reports are given in Appendix A.3. Details of data collection methods used are given in Appendix B, and the data reduction procedures developed are described in Appendix C. All Figures for Chapter 2 have been grouped at the end of the chapter to simplify finding and comparing specific ones.

2.2 Project Summary

The project called for design of a high-pressure, high-temperature system for the evaluation of materials in a simulated slagging coal gasification environment. The design task was regarded by the company as both difficult and complex in that it required the automatic control of temperatures, gas flows, liquid flows and coal flows at high pressure for continuous periods of up to 1000 hours. The main difficulty, and the novel feature of the proposed system, lay in the handling of flowing coal on such a small scale under extreme pressure and temperature conditions. Although the need for this type of equipment had been identified within the company for some time, the requirements had not been formally established, and ideas as to the nature and possible usage of the equipment were vague. In engineering design terms the 'problem was ill-defined' (C25, p.206).

Design work was scheduled to spread over two budget years at the company's request, and initially it was planned that construction would follow on directly from detail design, subject to funding approval. Approval times were anticipated to be lengthy, and this was allowed for in the schedule. All participants would, as a matter of course, be working on a number of other projects during the same period and the project was not regarded as different from any other in this respect; it merely followed others in a sequence and developed further what had gone before. A task team approach was planned in as much as team participants, and their involvement, would be varied according to project needs. The only unusual aspects from the company's point of view were firstly that the Pahl and Beitz procedures would be introduced where appropriate and secondly that every activity related to the project would be recorded in detail for analysis. It was clear that the use of the Pahl and Beitz procedures, under the guidance of a contract design engineer, would affect the outcome of the project to a certain extent, but from a research point of view this was a necessary intervention to provide an adequate framework for the analysis. For the purposes of this thesis it has been assumed that the technical design work followed the procedures of Pahl and Beitz but that all the other project activities followed their normal pattern within the company.

The project began with a proposal, submitted through the University to the Company at the request of a research group within the Company and with the guidance of their management staff. The proposal was accepted, a contract was signed and the design work started in October 1982. During the first three months the design task was clarified by defining the problem more precisely and compiling a detailed list of 'demands' and 'wishes' (B48) which formed the core of the design specification or list of requirements. This 20-page document, tabulating 308 requirements and constraints, served to formalize the input of everyone involved and to record what had been agreed. Conceptual design, which was completed during the next 4 months, presented few problems. The final concept was developed further during the course of the following 17 months and this phase, termed 'embodiment design' in accordance with Pahl and Beitz, was taken to include document preparation for obtaining construction approval and also the design of the control system. Detail design of the seven sub-systems and steelwork overlapped considerably with the embodiment design phase and was carried out during the final 14month period. The main sub-system was the reactor vessel assembly, shown in Figure 2-1.

The project is fully described in Appendix A.2 and sample pages from the six design reports are reproduced in Appendix A.3. These reports, issued as internal Company Reports and available on request, record in detail all design work carried out including calculations, correspondence, meetings and weekly reports. Observational data was collected from the time of the original proposal to the end of Month 34, by which time the

detail design drawings were almost complete and it was clear that little more useful data could be obtained. A sample Interchange Data Sheet from the main computer file is shown in Figure 2-2.

2.3 A Context Model for Engineering Design

For the analysis of the project it was necessary to differentiate between the overall project effort and that part of it regarded as the engineering design process, and to be able to classify the inputs to the project at different levels. To help visualize this a model was needed to represent:

- (i) The engineering design process in an industrial context;
- (ii) Appropriate resolution levels within the overall context;
- (iii) The human activities and outputs in engineering terms.

Pugh and Smith's activity model (B52) was a starting point, and the Pahl and Beitz model (B48) defined activities and outputs for each phase of the engineering design process. Resolution levels were taken from Gregory's contingency model (C10), modified according to Humphreys' levels (B33) and structured as suggested by Bessant (C3). The idea of incorporating a supply-demand loop came from Grant (A33) and from Ostrofsky's production-consumption cycle (B46). The systems approach of Checkland (B13), as used by Wilson (B71), helped in modelling human activity aspects. The result was a set of two diagrams, one representing the overall context within which engineering design takes place as shown in Figure 2-3, and the other representing the engineering design process set in this context as shown in Figure 2-4. Within the external environment are markets; within a particular market are competing companies; within the particular company is the management team controlling projects; and feeding into each project through individuals or groups are resources from the environment, the market, and the company. Customers (and the users) purchase products, generating revenue through exchange processes. From this the company pays costs, taxes and dividends etc, with the surplus providing an operating profit. External influences have an impact on the market, and so affect the activities and outputs at all lower levels.

Within such a context we are concerned with the *engineering input* to the project, as distinct from marketing, quality assurance or any of the other inputs. By highlighting the engineering input, with both the design and production processes displayed as sub-sets within the project, the phases of the *engineering design process* may be visualized in terms of *activities and outputs*, set in context with production, as part of a project within a company, within a market, within the external environment. The phases may be described as:

- (i) Through task clarification activities the problem is defined. Output is a design specification.
- (ii) Through conceptual design activities solutions are generated, selected and evaluated. Output is a concept.
- (iii) Through embodiment design activities the concept is developed. Output is a final layout.
- (iv) Through detail design activities every component is fixed in shape and form. Output is manufacturing information.

Iterations in the process are represented in Figure 2-4 by the feedback loops, and the transformation from 'abstract ideas' to 'concrete products' is shown by changes in linestyle around the loop as the information flow changes to document flow then finally to material flow. The model exhibits five levels of resolution which have been termed:

- Macroeconomic Level Environment external to the Market;
- Microeconomic Level Market within which the Company is operating;
- Corporate Level Company within which the Project takes place;
- *Project Level* Project with Engineering Design input;
- *Personal Level* Individual inputs to Engineering Design Process.

As this Context Model was developed it was reviewed by specialists to test for accuracy and terminology [Suckling (B60)] and 14 different versions were produced before it was considered satisfactory. Final checks were:

- (i) Assessment against requirements;
- (ii) Compatibility with existing models;
- (iii) Accuracy in representing real world situations [Calladine (B11)].

A weakness found was the lack of dynamic representation; a complementary approach is needed for this. A strength lay in the keyword representation of sub-sets to 'window' in on; a sort of spatially orientated checklist. On the basis of elementary checks the model proved adequate for grouping the different types of input to the project.

Although the model could be used in the general form as described above, it was possible to simplify it for this particular project as the company holds a monopoly in its main product area. In a monopolistic situation the 'company' may be regarded as equivalent to the 'market' [Grant (A33)]. This is represented on the model by 'windowing-out' the 'Company' box to become coincident with the 'Market' box while leaving everything else the same, as shown in Figure 2-5. The economic 'loop' for the project then lies wholly within the overall company. 'Revenue' represents potential 'cost savings' attributable to the results of the tests carried out in the 'gasifier test rig' (e.g. enabling use of lower cost materials for a full scale plant). 'Finance' represents a budgetary allocation for the project within a particular section of the company, and other resources are drawn from elsewhere in the company or from what has been termed the external environment. External influences have a direct impact on the company. 'Users' are research scientists working under the same management as that for the project itself, and the 'Customer' could be regarded as management at one level higher than that for the project. In the observed structure of the organization 'Engineering' and 'Administration and Services' were combined, and there was no separate 'Purchasing' group. 'Marketing' of the project took place within the overall company in that the project had to appear as a viable proposition to other groups competing for the same funds. 'Sales and Service' equates to system commissioning. 'Personnel', 'Quality Assurance' and 'Accounts' all existed as in-house service groups.

2.4 Overall Project Effort

For an analysis of the overall project, as distinct from the engineering design process, the work effort of all project participants was included. The Context Model was used to help categorize the work effort of each of the 37 project participants by resolution level and to help differentiate between project effort and engineering design process effort. Graphs of overall project hours and overall cost are shown by month in Figures 2-6 and 2-7. Some features are:

- Between Month 3, when the proposal was prepared, and Month 7, when the scheduled design effort started, almost no effort was put in.
- Between Month 8 and Month 24 the hours and cost per month were at a relatively steady level but then increased markedly.
- In month 16 there was no input to the project.
- In month 27 there was over twice the effort than in any other month.
- By month 34 the work effort was dropping off to a low level.

Further features emerge when the overall project effort is broken down by design process phase according to the Context Model, with actual hours and costs converted to percentage hours and costs as shown in Figure 2-8:

- The Task Clarification and Conceptual Design phases each contributed about 10% of the total effort, the Embodiment Design phase 35% and the Detail Design phase 40%.
- The Proposal phase effort was lowest at 3% but was not negligible.

- The Conceptual Design phase contributed a lower proportion of the overall project effort than any other phase except the Proposal.
- The relationship between percent of time and percent of cost was approximately 1:1. During Detail Design the relative cost of each hour was slightly lower, balanced by very slightly higher relative costs per hour during the other phases, as might be expected.

For production and construction projects the work effort is often graphed as 'resource allocation' in terms of 'man-days', but this approach was not strictly applicable for this design project as so much of the work effort was in the form of short interchanges between different people. However the variation in numbers of people involved each month, as shown in Figure 2-9, gives some idea of the commitment of resources. From the 3 to 4 people involved in Months 1 to 7 the numbers increased to an average of about 10 between Months 8 and 26 and then to about 18 for the rest of the project.

To consider the overall project in more detail the interaction between the project phases was studied. Figure 2-10 shows the project effort in each phase by month, and therefore indicates the overlap between phases. At a first glance the graph appears to have a lot of 'noise', which would be increased if time was plotted in days or weeks, and decreased if time was plotted in 2-monthly or 6-monthly intervals. It became apparent, however, that the 'spiky' nature of the graph plotted by month is significant for this particular project as each major 'peak' and 'dip' relates to specific events in the project history as discussed in Chapter 3. Furthermore it appeared that had such events not occurred, or had been foreseen and then compensated for, the profile of phase-by-phase effort would have been more like that shown in Figure 2-11. In summary:

- (i) If the project had gone according to plan (ideal case) the project phases would have been characterized by five 'humps' or bell-shaped curves on the graph, each overlapping others by a certain amount.
- (ii) In practice the project did not go according to plan, and specific events caused specific 'peaks' and 'dips' in effort.
- (iii) Those 'dips' caused by non-ideal events reduced the proportion of work done within the envelope of the 'ideal curves'. For example during Conceptual Design one team member's vacation resulted in the major dip in Month 13 (Figure 2-10), at a time when the ideal case (Figure 2-11) would call for effort greater than that in Month 12.
- (iv) For each dip occurring within the envelope of an ideal curve, there is a corresponding peak of effort to compensate later in time and outside the ideal curve for that phase. For example, to compensate for the dip in effort during Month 13 a peak of

additional effort occurred in Month 17. This peak might have been expected in Month 16, but the chance illness of a key team member delayed the work.

(v) Each such compensating peak delayed the finish time for that phase in the real case, diverting effort from the phase which followed and extending the overall project time.

The possibility of characterizing the 'ideal curves' in mathematical terms seemed attractive for comparing actual effort against the ideal case, but data from more projects would be required for the development of a valid mathematical model. Approaches tentatively considered were:

- (i) Assume a normal distribution for the effort in each phase;
- (ii) Characterize each phase by its median point, height at the median and band-width at its 'half-height';
- (iii) Characterize the curve for each phase in general statistical terms (2nd, 3rd and 4th moments about the mean).

The first one is a special case of the third and although its simplicity makes it an attractive approach the 'ideal curves' shown in Figure 2-11 do not meet the necessary conditions such as zero skewness. The second one is also simple but, although it might adequately characterize the curves for the first three phases of the project, it would be unsatisfactory for the less symmetrical embodiment and detail design curves. Of the three, characterizing the curve for each phase in general statistical terms would seem the best possibility, as comparisons of curve characteristics such as skewness, kurtosis (peak sharpness) and overlap could then be made between projects. Whether or not a mathematical approach proves possible, Figure 2-10 is a useful summary of the overall project effort, and can help to characterize the project. It shows that the Proposal phase was separate from the others, with a three month period before the Task Clarification phase began. One other zero period occurred, at the point where the Conceptual Design had almost finished and the Embodiment Design phase was starting. This was also the only other point where there was little phase overlap. Each project phase other than the Proposal phase ended with a peak of effort apparently outside the 'ideal' curve and this seemed to form a pattern throughout the project. Had the right things been done at the right time (i.e. effectively) and done in the best way when they were done (i.e. efficiently) then the work effort may well have been completed within the envelope of the ideal phase diagram, and the project would have been completed sooner.

This suggests that the higher the peak to width ratio of each phase curve and the larger the overlap between phases the more effective and efficient the project work effort would be, but it may not necessarily be so. For example, if embodiment design had overlapped with

conceptual design there would have been the risk that the 'wrong' concept was being developed. On the other hand, once the layout of the simpler sub-systems had been agreed on through embodiment design there would have been an advantage in going straight on to detail design for those, which would have been indicated by greater overlap between the embodiment and detail design phase curves. It is not possible to generalize from these results but certainly the flatter the curves, and the less the overlap, the longer the project time-span.

Figure 2-10 also shows another feature. It appears from the graph that the Task Clarification phase was completed in two distinct stages separated by a period of 18 months. In fact what happened was that due to the effect of external influences two changes were made in the design specification: the maximum operating pressure was increased from 1500 psi to 2500 psi and the maximum operating temperature from 1100 C° to 1300 C°. Unlike the late effort required to compensate for work not completed at the ideal point in time, this represents extra work outside the ideal envelopes altogether. What the graphs cannot show is the extra work effort created in other phases by the change in specification during Month 27 but, even ignoring this 'knock-on' effect, it is clear that the additional task clarification effort added work hours and cost to the project. Design of the control system, which was completed almost as a 'project-within-a-project' during embodiment design, also called for additional hours of task clarification.

At this point a number of questions might be asked such as:

- (i) How did project costs relate to project effort measured in hours?
- (ii) Did hourly charges reflect the relative 'value' of project effort?
- (iii) What about wasted effort, mistakes or mismatched expertise?
- (iv) What about people not always working to capacity?
- (v) Were there 'good' hours and 'bad' hours in terms of results?

The only costs incurred during the project other than direct labour costs were incidentals such as travelling expenses, telephone charges and postal charges. For the Company Staff these were included in the normal overhead added to the salary cost for in-house work, and for Contract Staff they were incorporated in the hourly charge rate used (including trans-Atlantic flights for one engineer). This allowed the simplifying assumption to be made that project costs were proportional to project hourly charges. In addition, although there was a 3:1 ratio between the highest and lowest hourly charge rate, the recorded hours for the highest and lowest rates were so few by comparison with the total that they had little affect on the overall relationship between hours and cost (see Figure 2-8). Thus, once the overall project cost had been calculated from the hours and cost-per-hour for each individual, a back-calculated average hourly charge rate gave a good overall approxima-

tion, and the project cost in pounds sterling could be considered directly proportional to project effort in hours. It also meant that although the 'value' to the project of hours worked varied in a subjective sense, for the sake of quantitative argument it could be reasonably assumed that all hours were of equal value. This is not to say that the issues raised by the above questions are unimportant. They most certainly are important, and are discussed further in Chapter 3. However for the quantitative analysis some simplification was needed, and it came through the use of the following two assumptions:

- (i) Project cost directly proportional to project effort in hours.
- (ii) All hours contributed equally to the project effort.

By plotting cumulative effort by time as shown in Figure 2-12, using these assumptions, it is possible to gain some idea of the 'percent completion' at various points in the project. The first 25% of project effort took 50% of the project timespan and the first 50% of the project effort took 75% of the project timespan. Thus 50% of the total project effort was completed in the final 25% of the project timespan. It is interesting to note that the 50% point in the project timespan was the point at which the Conceptual Design phase was ending and the Embodiment Design phase was beginning. This illustrates that, even for a project which did not have severe time constraints, most of the effort seemed to be put in at the end, and also that the Company resources involved increased with time. The graph has the 'S-Curve' characteristics typical of graphs showing percent completion of construction and production projects, as described by Hajek (I11). Based on Assumption (ii) the curve of 'actual' cumulative effort in Figure 2-12 may be considered to show 'percent completion' for this project. Based on Assumption (i) a cumulative cost graph would follow the same curve, closely matching the typical cumulative cost 'S-Curve' which Turner and Williams (H44), and Darnell and Dale (I9), suggest may be used for project cost control in engineering. From the Ideal Phase Diagram shown in Figure 2-11 the 'ideal' graph of cumulative effort shown in Figure 2-12 was produced, and comparison of the 'actual' curve with the 'ideal' curve provides a measure of where the project deviated from what was expected and by how much.

As the outputs from the engineering design process are less tangible than those from the production process or the results of construction projects, percent completion is more difficult to estimate for design work, but it is still regarded as a necessary measure of performance by management. By generating an 'ideal phase diagram' for a particular engineering design project, based on performance data from previous projects, a realistically modelled 'ideal' graph of cumulative effort may be produced. Comparison of actual work effort against the ideal could then be used for monitoring and control of engineering design work based on achievable goals, and the design team would have a better chance of producing reliable estimates of 'percent completion' and 'cost-to-

completion'. This in turn could give management earlier warning of deviations and more time to take appropriate compensatory action.

This discussion may be summarized in the form of four hypotheses:

Hypothesis 1

Ideal engineering design projects may be classified and characterized by a series of mathematically defined and overlapping curves, each representing the work effort in a particular project phase along a time axis, and in combination termed an 'Ideal Phase Diagram'.

Hypothesis 2

An 'ideal' graph of cumulative effort, based on an ideal phase diagram for a project, provides a model against which to measure actual performance.

Hypothesis 3

Design work not completed within the envelope of the ideal phase diagram for a particular project will have to be completed outside the envelope at a later time, causing diversion of effort and significant cost increases.

Hypothesis 4

Changes to the design specification outside the ideal curve for the Task Clarification phase cause increases in total project effort, and the later they come the greater the effect.

2.5 Project Effort by Individual and Group

As the project effort of each participant was recorded down to 0.1 hour it was possible to investigate the nature of the overall effort from any one of many viewpoints, and in great detail. For example the work effort by each of the eight participant groups, as summarized in Figure 2-13, may be broken down by individual participant and tabulated by month, as shown in Figure 2-14. In this particular table, hours rounded to the nearest hour are totalled by participant (rows) and by month (columns), the totals then being converted to percentages of the overall 2369 hours of effort. From these the cumulative hours and cumulative percentage were derived, giving rise to the graphs of overall project effort discussed in the previous section. The 37 participants are grouped by job and affiliation as listed by code in the left-hand columns and detailed in Appendix C.2. The format of this table is general in that it was used to create equivalent master tables of other types of data such as as participant mood, type of effort and work location.

As illustrated in Figure 2-13, and detailed in the master table of hours, 1507 hours (64%) of the overall project effort came from contract staff, 69 hours (3%) came from outside supply companies, 56 hours (2%) came from university staff and the remaining 741 hours

(31%) came from five groups of permanent staff within the Company. The input from four of these eight groups is detailed in Figures 2-15 to 2-18. To highlight the pattern of involvement for each group, the graphs are in terms of actual hours rather than percentages of totals and the vertical axis scales vary. By laying each of these graphs over the phase diagram (Figure 2-10), it was possible to see the following:

- (i) Directors had little involvement until midway through embodiment design when the developed concept was presented, and thereafter had slightly more, but irregular, involvement. The most input was 7.8 hours in Month 22 and the total recorded input was 21 hours (1%).
- (ii) Managers had a continual input throughout the project, the most being in task clarification and embodiment design. There is some evidence to suggest that their input increased at those times when the work effort fell outside the envelope of the ideal phase curves for the project. Their total recorded input was 154 hours (7%).
- (iii) The input of the research staff was also continual, and followed the general level of activity on the project. In particular there was over twice the normal level of input from research staff during the design of the control system in Month 27, and this is discussed further in Chapter 3. Their total input was 365 hours (15%).
- (iv) As the input of the contract design staff far outweighed that of any other group, it is not surprising that the overall pattern of project effort was in fact set by this group, and again this is discussed further in Chapter 3. In Month 27 two contract design engineers between them put in 290 hours of effort, which amounted to 12% of the total project effort and was the most concentrated period of project effort. Their total input was 1507 hours (63%).

2.6 The Engineering Design Process

2.6.1 Activities

The Pahl and Beitz model of the engineering design process shown in Figure 2-19 may be taken as representing one of the more defined and detailed general procedures currently available to the design engineer and project manager. As previously mentioned, the use of these procedures during this project provided a structure for initially categorizing the field data, and the data proved detailed enough to allow a quantitative investigation of two particular aspects. These were the identification of phases and 'steps' (or activities) in the engineering design process and the use of design 'methods and aids' (referred to in this thesis as 'design-related techniques'). Specifically it included comparing the measured results for this project with the recommended use of techniques and estimated use of time provided by Pahl and Beitz (B48, pp. 409-413) and reproduced in Figures 2-20, 2-21 and 2-22. The list of participants shown in Figure 2-14 was restructured according to the Context Model levels of resolution (Figure 2-5) and only those project hours directly attributable to the engineering design process were counted for this part of the analysis. The input of management and others not involved in design work was excluded, leaving 27 participants with 2178 hours (92%) of the total project effort.

The hours of each person were categorized firstly by *phase* of the design process and then by '*step*' within each phase, according to the Pahl and Beitz model as shown in Figure 2-23. Much of the work effort could not be categorized in this way and was coded 'X' in the first instance. When all the engineering design input had been classified the 'X'-coded input was reviewed, and six additional activities were identified, not specific to particular phases (and therefore not 'steps' in the Pahl and Beitz sense) but observed to occur in all phases. These activities were:

General Activities

XP - Planning Work	(personal day-by-day planning of activities)
XR - Reviewing/Reporting	(verbal or written project reports/reviews)
XC - Cost Estimating	(design costs, labour costs, hardware costs etc)
XI - Information Retrieval	(information processing of all kinds)
XS - Social Contact	(social interaction outside other categories)
XH - Helping Others	(informal help given on other projects)

The hours were also categorized by usage of design-related techniques as listed by Pahl and Beitz in Figures 2-20 and 2-21. Again much of the work effort did not fit any of these categories and was 'Y'-coded in the first instance. When all hours had been classified the 'Y'-coded hours were reviewed, and 13 additional techniques were identified. Those hours where no identified technique had been observed remained 'Not Classified'. The additional techniques were as follows, grouped into three sets:

Working Techniques

YL - Making Lists	(personal reminder lists)
YC - Cost Estimating	(all types of costing)
YS - Calculating	(simple and complex calculations)
YG - Scheduling	(use of bar charts etc.)
YF - Filing	(making/using personal files of information)

Communicating Techniques

- YQ Questioning People (informal/formal, verbal/written)
- YP Presenting Viewpoints (informal/formal, verbal/written)
- YN Negotiating Agreements (informal/formal, verbal/written)
- YR Reviewing and Reporting (informal/formal, verbal/written)

Motivating Techniques

YI -	Becoming Involved	(with the design, the person or the situation)
YE -	Injecting Enthusiasm	(conscious effort to raise level of enthusiasm)
YH-	Adding Humour	(to break tension or bind group together etc.)
YT -	Team Building	(conscious effort to optimize group effort)

Five master tables were compiled, which together detail all the techniques observed during each activity within each phase of the engineering design process for this project. Proposal preparation involved input from design engineers so it was included as a separate phase of the engineering design process, in addition to those of Task Clarification, Conceptual Design, Embodiment Design and Detail Design. Total hours, and percentage of total hours per phase, were tabulated for each activity and each technique. The five sets of results are shown in Figures 2-24 to 2-28. Two more tables were derived from these, for comparison with the Pahl and Beitz ones shown in Figures 2-20 and 2-21. To produce an equivalent to Figure 2-20 the tables for the Proposal, Task Clarification and Conceptual Design phases were combined, and the totals recalculated. To produce an equivalent to Figure 2-21, techniques No.5 to No.14 from the Embodiment Design table (Figure 2-27) were combined into a single line item termed 'concept phase methods'. The resulting two tables are shown as Figure 2-29 and 2-30 respectively. Finally, as shown in Figure 2-31, a bar graph was produced for comparison with the Pahl and Beitz estimate on percentage breakdown of 'man-hours spent on the conceptual phase'.

The main features of these results may be summarized as follows:

- (i) 47% of the engineering design effort could be categorized according to the Pahl and Beitz 'steps' of the engineering design process.
- (ii) By adding 6 more 'activity' categories, and using these in each phase of the engineering design process, the remaining 53% of the observed engineering design effort could be accounted for.
- (iii) 22% of the observed engineering design effort could be categorized according to the 'methods and aids' recommended by Pahl and Beitz.

- (iv) By adding 13 more techniques for 'working', 'communicating' and 'motivating', a further 74% of the total engineering design effort could be accounted for, the remaining 4% being left unclassified.
- (v) In general the observed activities followed the sequence of 'steps' represented in the Pahl and Beitz model, except that 'abstraction of the problem' occurred during task clarification rather than in conceptual design. The only missing 'step' (i.e. one with no hours attributed to it) was 'firming up into concept variants'. This one became redundant when it was decided to combine the best features of the four final concepts into a single preferred concept.
- (vi) The activity which accounted for the most engineering design effort was found to be 'reviewing and reporting' at 22% of the total.
- (vii) The most used design-related technique was 'communicating by means of reviews and reports', observed as taking 15% of the total time.

The summarized data in Figures 2-24 to 2-31 could be used for a far more detailed study on the activities within each phase and the techniques used than is possible within the scope of this thesis, and if equivalent data from other projects became available useful comparative studies could be carried out. All that can be done here is to compare the work effort measured on this project against the estimates which Pahl and Beitz have compiled based on their experience in Germany. Figure 2-31 shows their estimated percentage breakdown of 'man-hours' for task clarification and conceptual design together with the equivalent results for this project. There appears to be little correlation between them and there are good reasons for this. The estimates of Pahl and Beitz are based on their experience with a number of different projects, perhaps many. Compared with this are the measured results from a particular project, with its own particular characteristics. One represents an average across a spectrum of projects while the other represents a single project at one end of the spectrum. This project was a 'one-off', so a high proportion of effort on clarifying the task is to be expected, and it involved the design of test equipment operating under such extreme conditions that the scope for producing many different concepts was restricted. The low proportion of time spent on actual conceptual design, by comparison with clarifying the task, would therefore seem in keeping with the nature of the project. It appears that the bar graph of engineering design effort by activity gives a 'profile', characteristic of this phase of the project. If this were extended to cover the activities for all phases, the resulting overall project profile could be used to help classify this project for comparative studies.

At the time of writing, a new edition of *Konstruktionslehre* (B47) has been published in Germany. It includes a new chapter on cost estimating, and the tables shown in Figures 2-20 and 2-21 have been revised to reflect this. Cost estimating as an 'activity' accounted

for 119 hours (5%) of the Gasifier Test Rig engineering design effort. Estimating costs, as an observed 'technique', was used during 62 hours (3% of the design time). This compares, for example, with 122 hours (6%) spent on clarifying the task and 57 hours (3%) using embodiment design detail guidelines. The data thus provides evidence in support of the emphasis now given to cost estimating in the new edition of *Konstruktionslehre*.

2.6.2 Outputs

So far the concern has been with the *activities* which occurred within each phase of the engineering design process. In this section the *outputs* from each phase are considered. Nadler sums up the problem with outputs (B45):

"Productivity is usually measured by comparing the amount of effort put into the work with the quality and quantity of work produced. Manufacturing output is much easier to measure than office output. Also, because a designer's productivity is measured qualitatively as well as quantitatively, the value of his work is related not only to the number of designs produced, but also to their effectiveness."

Proposal preparation resulted in a proposal document, task clarification in a design specification, conceptual design in a concept, embodiment design in scaled layouts and detail design in manufacturing drawings with other production documents (Figure 2-5). The question was: how to assess these outputs? Once the Gasifier Test Rig had been built and commissioned its design could be analysed on the basis of actual performance, but in the absence of operational data this was not possible. This is typically the position of a project manager when deciding to commit a project to manufacture. What was possible, since the procedures recommended by Pahl and Beitz (B48) had been followed, was to compare the procedures in theory with what actually happened in practice as discussed below.

Proposal Phase

Specific guidelines for the preparation of project proposals are suggested by Hajek (E7) and others specializing in project management, but although procedures for 'product planning' are offered by Pahl and Beitz, proposal preparation is not considered a 'phase' of the engineering design process in its own right. For the Gasifier Test Rig, three percent of the overall engineering design effort went in helping to prepare the original project proposal (Section 2.6.1). The 15-page document included preliminary ideas from the project team, a description of the proposed design approach, a schedule and a cost estimate. It was completed four months before the funded design effort started, and it had to be considered either as part of the Task Clarification phase, which was hardly the case as no project existed at the time, or as a phase of the engineering design process in its own

right which complicated the issues. As shown in the simplified Context Model in Figure 2-5, a compromise was reached by including it as a separate phase of the engineering design process for this project. It was seen as a link between the 'project brief' and the 'design task', with its own activities, including the steps of 'product planning' and 'selection of task' shown in Figure 2-23.

The 15-page proposal was accepted in time for the design work to start on the proposed date, and a contract was agreed without problems. Only two points regarding support staff and the cost breakdown required negotiation and the rig design was carried out within the estimated cost. The output of this phase was assessed as satisfactory in quality and quantity, and it took 64 hours of the engineering design effort (3%).

Task Clarification Phase

The recommended procedure used for clarifying the design task (B48, p.49) involved defining the task (i.e. a statement of the problem to be solved), then using a checklist in questioning all project participants to generate a list of 'demands' (essential requirements) and 'wishes' (preferences). The detailed design specification compiled from this would theoretically provide criteria for selecting and evaluating design concepts, and the requirements to be met during embodiment and detail design.

The finally agreed design specification for the Gasifier Test Rig was a 20-page document (sample page in Appendix A.3) listing 308 requirements and constraints, of which 217 were 'demands' and 91 were 'wishes'. There were 13 contributors, representing 5 of the 8 participant groups shown in Figure 2-14, and 34 of the requirements came from 400 ideas generated by a 45-minute brainstorming session involving 15 people. A breakdown of the specification by demands and wishes is shown in Figure 2-32. No attempt was made to rank each item in order of importance, as this would be a matter of opinion, but they have been grouped into four categories:

Function - concerned with the performance of the rig;

Production - concerned with manufacture of the rig;

Operation - concerned with running and maintaining the rig;

Information - information of use in designing the rig.

Two main points emerged:

(i) A confidential internal report indicated that researchers needing a test rig would generally sketch out the requirements in the form of a concept, and submit this either to the senior design engineer in the Company or to an outside supplier. Design work would begin, and there would often be misunderstandings and problems, leading to disagreements and wasted effort. One reason for this was the lack of involvement of groups such as safety specialists at the task clarification stage. Many important requirements would be omitted from the initial list, and continual changes would be made during the rest of the project. The table in Figure 2-33 shows that for the Gasifier Test Rig over 40% of the design requirements came from sources other than research staff. In particular 19% came from the services staff responsible for manufacture. It was evident that the procedure used for this particular design specification almost doubled the list of requirements which might have been expected had normal Company practice prevailed, and this avoided later problems.

(ii) Each requirement in the specification was labelled with the name of the contributor, and the document was circulated to all project participants for review. A total of 92 corrections, clarifications and additions were made, involving 72 demands and 20 wishes. Once the specification had been agreed on by all parties only two items were changed during the rest of the project, and these were caused by specific external influences as will be discussed in Chapter 3.

In functional terms the specification was assessed as being adequate in quality and quantity, and it provided a solid base for all further work. The procedure used was regarded as most effective by the project team and was later adopted by several participants for use on other projects. Task Clarification took 258 hours (12% of the engineering design effort).

Conceptual Design

Design theory (B48, p.112) indicates that the output from the Conceptual Design phase should be the concept which most fully satisfies the requirements of the design specification. Only those candidate concepts which satisfy every 'demand' in the specification should pass from the selection 'step' to the final evaluation 'step'. The most appropriate concept is then determined from an evaluation of how well each candidate meets the wishes or preferences.

For the Gasifier Test Rig this meant that any candidate concept would have to satisfy 217 demands to be selected and those selected would have to be evaluated against 91 wishes. This presented the problem of how to deal with such a full list of requirements, and in practice the selection and evaluation procedure was based only on those requirements judged to be the most important. The 'objectives tree' procedure described by Pahl and Beitz (B48, p.121) for weighting criteria according to relative importance could have been used, but it was found unnecessary to go to this level of detail in order to come to a decision regarding the final concept. As is detailed in Appendix A.2, eight concepts were generated, and a great many possible solutions were generated for various 'sub-functions' (B48, p.67) by using discursive techniques. Four selection charts (B48, p.113) were used in the selection process, and subsequent evaluation led to the final reactor concept shown

in Figure 2-34. Associated with this were concepts for its six ancillary sub-systems. Some important features were:

- Modular construction to allow various internal reactor configurations;
- Double-wall vessel; all-bolted assembly for easy maintenance;
- Vessel trunnion-mounted to allow vertical rotation for lower access;
- Specimens and instrumentation mounted on a sub-assembled cartridge;
- Adaptable for different types of test using same vessel and controls;
- Automatic control system for 1000-hour continuous operation;
- Three-level automatic alarm and shut-down procedure.

Many safety requirements and building constraints came from participants other than researchers, and these were taken into account in the final concept features. An example is the requirement that: 'Rupture discs should discharge to a proper vent-line system'. This sounds a small item but it involved a long run of high-pressure piping which would have been omitted from the cost estimate for construction, had the requirement not been included in the design specification.

The output from this phase was a concept, judged by the project team to be capable of meeting the requirements of the design specification, and a preliminary cost estimate for construction of £85,555 with reserves of £16,950 (to reflect the confidence level). Of the procedures recommended by Pahl and Beitz which were used during this phase, the selection charts were found to be the most helpful. In general the overall procedure for arriving at the final concept was considered rather cumbersome for this project. As no procedures were offered for estimating costs (see page 38) a Company procedure was adapted to suit the project (see Appendix A.2). Conceptual Design took 211 hours (10% of the engineering design effort).

Embodiment Design

In theory Embodiment Design is seen as "...that part of the design process in which, starting from the concept of a technical product, the design is developed, in accordance with technical and economic criteria and in the light of further information, to the point where subsequent detail design can lead directly to production." (B48, p.166). Many different approaches have evolved for the development of concepts, and the one chosen depends on the nature of the project. For the Gasifier Test Rig the approach used was progressive detailing of layouts, rather than prototyping, modelling, experimenting, computing or other approach. Design theory (B48, p.171) offers 'rules', 'principles', 'guidelines' and checklists to help with this (rather than a generalized procedure), and a specific checklist is provided for evaluating the embodiment design output (B48, p.310).

In practice it was found difficult to classify work hours specifically as 'conceptual design', 'embodiment design' or 'detail design'. It had to be done in some definite way for the analysis, so all those hours between the meeting when the design specification was finalized and the one when the concept was finalized were classified as 'conceptual design'. Subsequent hours were divided into 'embodiment design' or 'detail design' depending on whether they contributed to the development of the reactor concept and overall layout (embodiment design) or dealt with individual components, detail part drawings or detail calculations (detail design). This proved adequate except for those hours spent on cost justification documents referred to the *developed* concept, with refinements such as the recirculation of gases and partial separation of tars and gases within the reactor, so these hours were categorized as embodiment design. For the control system design each interchange was considered individually. There were task clarification hours for the controls engineer, as well as embodiment and detail design hours, but the conceptual design had been completed previously.

Whereas conceptual design was mainly concerned with the reactor assembly, embodiment design was concerned with the development and integration of all seven subsystems. For the analysis it was assumed that at any point in time all sub-systems were at the same stage of development except for the control system. Actual fluctuations were small enough to be neglected when considered on the month-by-month basis used here. The details of the developments to the reactor concept during this phase are described in Appendix A.2, and Figure 2-1 shows the developed concept. Examples of its features are:

- Sub-assembly cartridge for the specimens and instrumentation modified to incorporate partial separation of tars and gases;
- Heating element cartridge modified to accept four independently controlled elements instead of two;
- Double O-ring seals with leak detection and provision for emergency nitrogen pressurization between them;
- Annular-groove weld preparation in pressure vessel cap to permit the welding of replacement 'inner reactor chamber' tubes to this cap with no need for certified inspection.

These features, and the many others like them, may be considered in terms of the embodiment design rules, principles and guidelines recommended by Pahl and Beitz, and may be assessed according to the evaluation checklist. Of the 38 reactor components (Figure 2-1) given a full design treatment, the 'inner reactor chamber' welded fabrication provides an illustrative example involving almost all the rules, principles and guidelines and this is shown in in Figure 2-35. The 'rules' were considered more as 'overall

guidelines' for this type of evaluation, and the 'principles' and 'guidelines' more as 'detail guidelines'. This simplified the categorization of hours for the tables in Figures 2-24 to 2-31. For sub-systems other than the reactor assembly a high proportion of bought-out components were used, so there is less evidence of the importance of the detail guidelines, but the the 'overall guidelines' of clarity, simplicity and safety applied to all sub-systems, and the evaluation checklist could still be used. For instance the rupture disc mentioned in the last section is an example of a 'protective system', as described by Pahl and Beitz (B48, p.189).

For this project the output of the Embodiment Design phase included: the developed reactor concept; the equipment selection and incidental design for the seven sub-systems; the preliminary and detailed overall layouts; a more detailed cost estimate with cost justification documentation; and the control system design complete with the Process and Instrumentation (P&I) Diagram. In addition to the 'rules', 'principles' and 'guidelines' for layout design, other types of guideline were used, such as those given in manufacturers' catalogues for selection of bought-out components. Final layouts produced were well-received by the 'customer' and 'users', and through them the project gained more support at this stage. The quality of output from this phase was considered satisfactory, but productivity was low. This is discussed in Chapter 3. Embodiment Design took 770 hours (35% of the engineering design effort).

Detail Design

Detail design theory draws together techniques used in the 'form' design of individual components, and guidelines for completing and checking the final production documents (B48, p.362). Form design is concerned with the interactions between shape, materials and manufacturing process for components, and the integration of components into assemblies. The output from the Detail Design phase has traditionally been in the form of detail drawings but is now often in the form of digitally stored manufacturing information. For the Gasifier Test Rig project there were no facilities for 'computer-aided drafting' available at the time, and all drawings were manually produced.

There was clearly overlap between the embodiment design and detail design phases, and it was sometimes difficult to classify a specific interchange as one or the other. However there was a precisely defined point at which detail design started. This was a meeting with the design office manager to agree on a schedule, starting from that date, for the completion of all necessary manufacturing drawings. It marked a definite change of emphasis on the project. Had everything gone as planned the drawings would have been completed within the time limit set for research data collection and the data would have been complete for this phase. However, despite the careful planning, no qualified detail designer was available until well into the agreed period. This delayed the work for 5 months, and the situation was not resolved until too late for all the drawings to be completed before the field research ended. Approximately 12 remained to be finished before the detail design work could be considered complete and an estimate of the time required to finish these was 30-40 hours. This amounts to just over 1% of the overall engineering design effort, and it was considered a small enough proportion to be omitted without materially affecting the research findings.

The majority of the detail drawings necessary for manufacture and assembly of the Gasifier Test Rig system were completed, together with the 138-page GTR-6 design report containing detailed calculations, descriptive notes, correspondence, and detailed sketches. The 'inner reactor chamber' welded assembly described previously also provides a typical example of a shape-materials-manufacture interaction problem tackled during detail design, as shown in Figure 2-36. It included: selection of materials (discussed in I12, I17, I19); use of the pressure vessel 'codes' BS 5500 and ASME VIII (see Appendix A.3, Report 5); dimensional and geometrical tolerancing; welding sequences during assembly; selection of standard O-rings using the manufacturer's guide-lines; and questions of thermal expansion, creep and heat transfer. The output from the detail design phase, up to the cut-off point for data collection included:

- 42 pages of pressure vessel calculations;
- 8 pages of scrubber calculations;
- 19 pages of steelwork calculations;
- 18 pages of other calculations;
- 65 detail drawings;
- 14 files of supplier information with index.

Although the work which was completed was assessed as satisfactory, the productivity during this phase was poor, and the reasons behind this are discussed in Chapter 3. Detail Design took 875 hours (40% of the overall engineering design effort), excluding the estimated hours for completion of the drawings.

2.7 Participant Interchange Characteristics

2.7.1 Type

Each of the 2488 interchanges was coded according to the number of people present and the following categories of type:

Type of Effort	Description	Code
Letter	- note or formal letter (being read or written)	LI or LO
Telephone	- telephone communication (incoming or outgoing)	TI or TO
Meeting	- any face-to-face discussion, meeting or chat	M + People
Work	- personal or collaborative on specific tasks	W + People

The proportions of work effort by type are shown in Figure 2-37. Of the project effort, 36% came from participants working alone on specific tasks, 16% came from meetings between two participants, 13% came from work in pairs on specific tasks, and 8% on meetings involving three participants. Of the remaining 27%, 9% was split between letters and telephone calls, 5% came from meetings involving four participants, 4% from working trios and the final 9% involved 5 participants or more, with a maximum of 20.

What may be concluded from this is that half the project effort was from people working alone or in pairs, that meetings or other contact between two people played an important part and that a lot of time was spent in remote communication by letter and telephone. Rather than answer any questions, this opens up an area worth investigating in more depth than is possible in this thesis. For example what is the breakdown of type of effort by month and by phase of the design process, and do particular types of effort correlate with particular activities or use of techniques within each phase? It also suggests that communication between people, as distinct from work effort on specific tasks, is an important part of the engineering design effort in its own right, and needs investigation as such. For example, on this project some 43% of the total effort was spent in direct communication of one sort or another. In the activity and technique tables (Figures 2-24 to 2-30) this was accounted for by the inclusion of the 4 categories of communicating 'technique'.

2.7.2 Location

Each participant's work effort within each interchange was also coded by type of location according to the grouped listing below:

Type of Location	Description	Code
	Offices in Company	
Own Office	- personal office in Company premises	0
Another's Office	- someone else's office	А
Shared Office	- office with cross talk from non-participants	Ν
Design Office	- office dedicated to design and drafting	D
Laboratory	- scientific research laboratory	L
	Public Areas in Company	
Conference Room	- conference room or other meeting room	R
Cafeteria	- cafeteria, or dining area in the company	С
Library	- library in the company or elsewhere	В
Lobby	- corridor, lobby or other open public area	Р
	Remote Locations	
Outside	- areas external to normal office buildings	Е
Travel	- in transit by any form of transportation	Т
Home	- personal or other living accommodation	Н

Of the overall project effort 36% was carried out by participants working in their 'own office', that is at a desk in an enclosed space allocated specifically to them, and 15% was by people working temporarily in someone else's office. An example of this would be a design engineer meeting with a manager in the manager's office to review project progress. Another 17% was carried out in an office dedicated to design and drafting and 10% in a conference room. Many other locations were involved to a lesser degree, ranging from 7% work at home to 0.5% in libraries as shown in Figure 2-38.

The observation from this is that although most of the project effort took place in offices, one third of it took place in laboratories, conference rooms, cafeterias, libraries, corridors, at home, outside and while in transit. In other words the project effort was not confined to specific locations but often took place wherever particular participants happened to be at the time. This will be discussed in more detail in Chapter 3. The split of effort amongst the five different classification of offices is also of importance. Less than one fifth of the project effort took place in the 'design office' while almost the same amount took place in other people's offices and over twice this took place in participant's own offices. So for this engineering design project less than one fifth of the work effort took place in what was normally regarded by the Company as 'the place where design work is done'.

There is scope for further analysis with this data. For example it would be possible to separate out the engineering design effort from the project effort according to the Context Model, and then map the use of different locations during each phase and activity of the design process. The same could be done for design-related techniques, for type of effort, for each participant and for groups. All of these could add more insight regarding engineering design effort and where it is carried out in practice.

2.7.3 Mood

A great deal of data was recorded which indicated the state of mind or the 'mood' that participants appeared to be in as they worked on the project. It was realized that this was useful data but in the diffuse form of diary notes it didn't mean much, and within the engineering design field there was no guidance on how it could be handled. However, as it was known from the literature (H15, H35, H44, I1), and from personal experience, that the influence of enthusiasm, involvement and tenacity is important in design, it was felt that a preliminary attempt should be made to develop a way of handling this sort of data.

The first step was to indicate the observed 'mood' of each participant in every interchange by means of a single word where possible, entering it in the 'Mood' column of the database as shown in Figure 2-2. By masking all columns except person, topic, mood and remarks, a 'plus', a 'minus' or a 'zero' was assigned in the 'M' column for each of the 2488 records, based on whether the observed mood was judged positive, neutral or negative with regard to the well-being and progress of the project. It proved possible to mentally set the 'mood' word in context by glancing at the other fields displayed for that record, and to recall the interchange in enough detail to assess whether the mood had been good, bad or neutral from the project point of view. Having done this the results were plotted, to see what could be observed from this information. Just as the number of take-offs and landings is often more important than hours flown in aircraft design, it appeared that the number of positive, negative and neutral counts by record was of importance here, rather than the 'mood' weighted by the number of hours. The table shown in Figure 2-39 was compiled by assigning +1 for each '+' in the 'M' column of the database, zero for each '0' and -1 for each '-', summing the scores per month for each participant, and dividing by the sum of the participant's records for that month. This gave an average or 'mean mood', varying between totally positive (+1) and totally negative (-1) for each participant during each month.

From this table various graphs were produced, and three examples are shown in Figures 2-40 to 2-42. Figure 2-40 indicates that the 'mean mood' for the project was almost always positive, starting at a value of about 0.6 and exhibiting a gradual decline with time. The equivalent graph for the Managers, shown in Figure 2-41, indicates a pronounced drop-off with time, while the graph for Contract Staff in Figure 2-42 shows no such general

decline. These results can be explained by reference to influences which affected the project, as discussed in Chapter 3. A better approach might be to show vertical bars indicating total positives and total negatives instead of just points on the graphs, as this would give an indication of spread within each month and generate a bandwidth pattern. However, this is beyond the scope of this current research.

2.8 Conclusions

- (i) Empirical field data capable of being analysed has been gathered from all phases of an engineering design project in industry by means of participant observation.
- (ii) A Context Model has been developed for the project, to help in differentiating between overall project effort and the 92% part of it attributable to the engineering design process.
- (iii) Analysis of the project effort by month revealed the nature of the project phases and the extent of overlap between them, which gave rise to four hypotheses based on measurement of actual effort against an 'Ideal Phase Diagram' and ideal cumulative totals.
- (iv) A table of monthly project effort for each participant was used to produce a series of graphs showing relative input and cumulative totals for different groups during the five phases of the project.
- (v) The 'steps' of the engineering design process, as modelled by Pahl and Beitz, accounted for 47% of the observed engineering design effort. Six additional categories of activity were identified which accounted for the remaining 53%.
- (vi) The Pahl and Beitz listing of 'methods and aids' accounted for 22% of the observed engineering design effort. Thirteen additional categories of design-related techniques were identified which accounted for a further 74%. Four percent remained unclassified.
- (vii) The activity which accounted for the highest proportion of the total design effort (22%) was found to be reviewing and reporting, and the most used design-related technique (15%) was communicating by means of reviews and reports.
- (viii) Theoretical and observed outputs were compared for each phase of the engineering design process, and actual outputs were evaluated in terms of quality and quantity. Those from the Proposal, Task Clarification and Conceptual phases were assessed as adequate in both quality and quantity. Those for the Embodiment Design and Detail Design phases were of adequate quality but productivity was low. In general the outputs were found to match those in theory, except for the

addition of cost justification documentation and the control system design in the Embodiment Design phase.

- (ix) Over 50% of the observed project effort was carried out by people working alone or in pairs on specified tasks, 30% was spent in meetings involving 2, 3 or 4 people and 9% was split between the writing or reading of letters, and on telephone calls.
- (x) The work effort was carried out in a variety of locations ranging from specifically allocated personal space to more public areas within company premises, and remote locations such as in aircraft or at home. Over 50% took place in a personal office of one or other participant. Only 17% took place in the 'design office'.
- (xi) A preliminary way of reducing and quantifying subjective data collected on the 'mood' of participants during the course of their project work has been developed. The variation in 'mean mood' of different participant groups by month was plotted, as well as the overall 'mean mood' by month. The results reflect the subjective assessments of team members, as will be seen in Chapter 3.

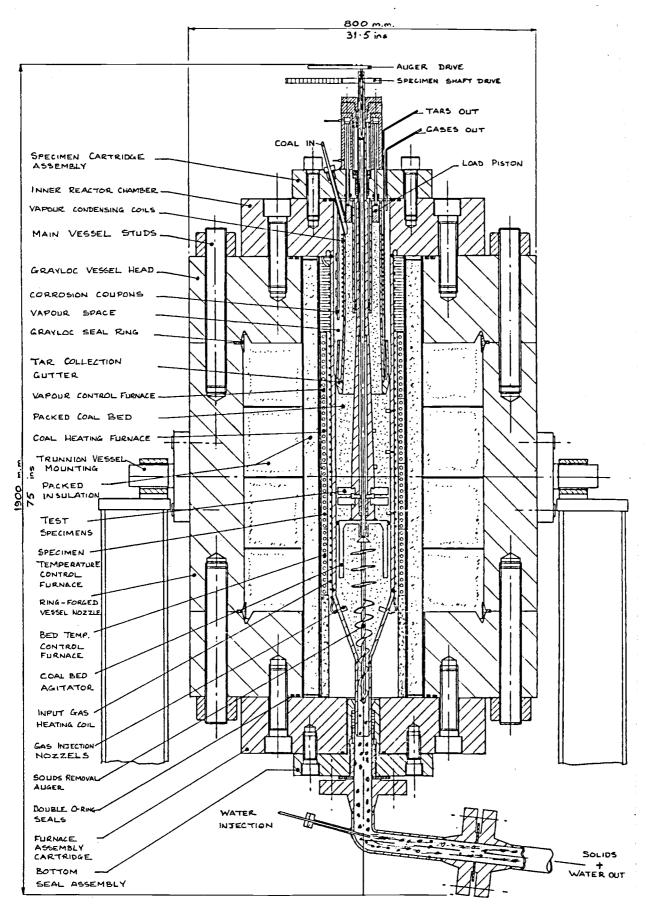


Figure 2-1 Developed Reactor Concept

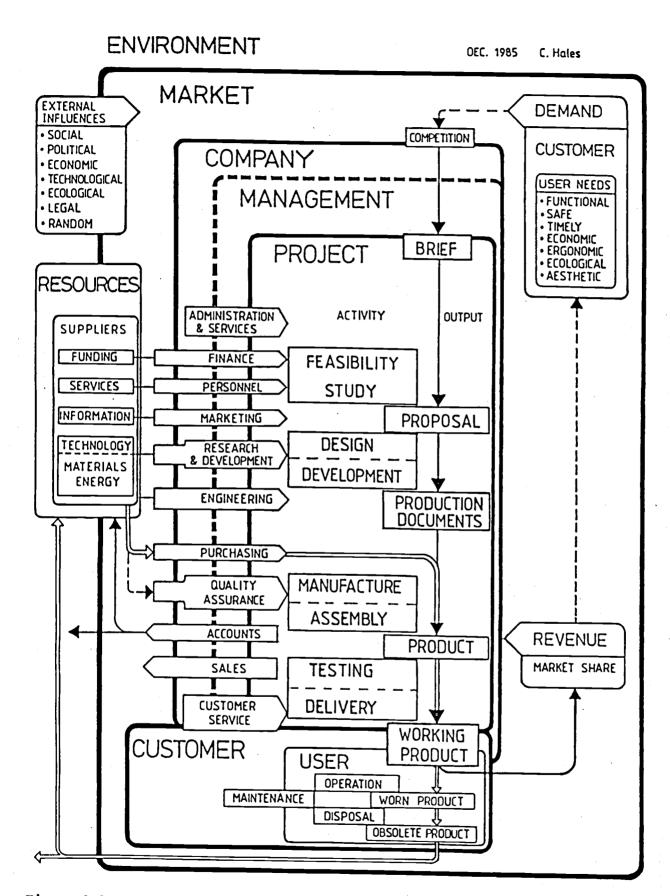
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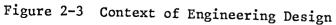
8

GTR PROJECT INTERCHANGES

		_							_		
INT/NO	PERSON	DATE	TYPE/L	TOPIC	HRS	e/H	P/ACT	TQ	M	MOOD	REMARKS
									\square		
911	1.51 1	04/10/02	1 2 2	PREPARATION OF A-FORM	0 2	14	c xc	YP		HELPFUL	HOW TO PREPARE FORMS
	CDE						CXC				NEED FOR GOOD APPROACH
	S1_A						CXI			FRIENDLY/HELPFUL	SAMPLES OF COKE ETC.
							CXI			QUESTIONING	NEED MORE INFO
	CDE	04/10/03					EXP			CHEERFUL	CCE AVAILABLE? (CALL TO USA
				CONTROL SYSTEM DESIGN	0.5	16	EYP	İΥΤ	۱٥		CDE IDEA/ BRING CCE TO UK
				ARRANGE MEETING	0.4	17	C XI	YE	I.	ENTHUSIASTIC FRIENDLY PLEASED	VISIT LOCAL REP
				ARRANGE MEETING	0.4	15	C XI	YE	ļ.	FRIENDLY	MEETING WITH LOCAL REP
	CDE	04/20/83	¥ 2 Å	COST ESTIMATE FOR VESSEL	3.0	17	C XC	YC	+	PLEASED	COSTED ALL PARTS
215	SE VE	04/20/83	2 0	COST ESTIMATE FOR VESSEL	3.0	15	C XC	YC	1	GOOD WORKING ATMOS	IN EVENING AT REP'S HOUSE
	0.00		ما و سا	URGORY DOAWTHO			E PL		•	BUSY	FOR LEAVING WITH REP
217	CDE	04/21/83		VESSEL DRAWING VESSEL WTS & COSTS BUDGET QUOTE NEEDED BUDGET QUOTE NEEDED BUDGET PRICE GIVEN	3.0	17	C XC	YC		TECHNICAL	HELP NEEDED FROM SL_A
218	CDE	04/21/83		BUDGET QUOTE NEEDED	0.1	17	C XC	YC		FRIENDLY	QUOTE WILL BE IN ON 22 APR
218	SE FE	04/21/83	T 2 10	BUDGET QUOTE NEEDED	0.1	15	C XC	YC	+	INTERESTED	WILL CALL BACK TOMORROW
219	CDE	04/22/83	T 2 do	BUDGET PRICE GIVEN	0.1	17	C XC C XC	YC		PLEASED	APPROX 9000
219	SR FR	04/22/83	T 2 do		0.1	115	C XC	YC			VERY SPEEDY QUOTE
219	SRFL	04/22/83	T 2 10	PRICE FOR CHAIN HOIST	0.1	15	C XC C XC	YC		HELPFUL	875 BUDGET PRICE
	CDE	04/22/83	T 2 do	PRICE FOR CHAIN HOIST	0.1	17	C IC	YC	4	PLEASED	875
	CDE	04/22/83	M 2 N	COST ESTIMATE/A-FORM	0.8	17	C XC	YC		CHEERFUL	PRIORITY SCHEDULE
				COST ESTIMATES/A-FORM	0.8	17	C XC	YC	+	ENCOURAG ING	PRIORITIES FOR CDE
	CDE	04/22/83		CONTROLS & EMBODIMENT DESIGN	3.0	17	EXP	ΥT	+	ENTHUSIASTIC	PLANNING & CCE FROM USA
	CDE	04/22/83	¥ 2 A	COST ESTIMATE	2.5	17	C XC	YC	+	APPRECIATIVE	APPROX 8000./SAW FACILITIES
223	DRU	04/22/83	¥ 2 0	COST ESTIMATE (INT. REACTOR)						FRIENDLY/HELPFUL	MACHINE PARTS COSTED
	CDE	04/22/83	W 1 0	9 COST ESTIMATE SHEETS	6.0	17	C XC	YC	+	ENTHUSIASTIC	102,500 TOTAL
				COSTS OF INCONEL	0.5	12	C XC	YC	ŧ	FRIENDLY/HELPFUL	INCOLOY 600 & 800H
				GREETINGS	0.1	17	C XC	0		CHEERFUL	SL_A CALLED AWAY
							C XC		0	NEUTRAL/PESSIMIST	SL_A CALLED AWAY
	CDE	04/25/83	N 3 A	GREETINGS/COST JUSTIFICATION	0.1	17	C XC	0	+	CHEERFUL	SL_A TO OTHER MEETING
				COMPUTER PACKAGES	0.9	14	CXS	0	+	CHEERFUL	INTERLUDE
	CDE	04/25/83	X 2 A	COMPUTER PACKAGES	0.9	17	CXS	0	+	CHEERFUL	INTERLUDE
	SL_A	04/25/83	W 3 A	COSTS/CALCULATIONS/CONTROLS	1.5	17	C XR	YP	0	NEUTRAL	COST EST.BREAKDOWN & CCE
228	ASE A	04/25/83	W 3 0	A-FORM PREPARATION	1.5	14	CXR	YP	+	HELPFUL	DISCUSSED COSTS
	CDE	04/25/83	W 3 A	A-FORM PREPARATION	1.5	17	CXR	YP	+	PLEASED	HELPFUL ON APPROACH
	AN_A	04/25/83	N 2 0	A-FORM & COSTS	1.3	19	CXC	YC	+	OPTINISTIC	RIG CONSTRUCTION COST ESTIM
	CDE	04/25/83	X 2 0	A-FORM & COSTS	1.3	17	CXC	YC	+	CHEERFUL	DISCUSSED COST EST SHEETS
230	CDE	04/26/83	LIIO	CONTROL & EMBODIMENT DESIGN	0.3	17	EXI	YE	+	PLEASED	HELPFUL INFO FROM USA
231							CXR			BUSY	CATCHING UP
232	CDE	04/26/83	T 2 00	THANKS FOR HELP	0.1	17	CIS	YI	+	APPRECIATIVE	
232	DE_U	04/26/83	T 2 10	THANKS FOR HELP (FROM CDE)	0.1	12	CXS	YE	+	PLEASED TO HELP	CALL FROM CDE
	CDE	04/26/83	T 2 0	VAT ON A-FORMS	0.3	17	CIC	YC	0	QUESTIONING	VAT TAKEN OFF LATER
233				VAT ON A-FORM			CXC			HELPFUL	NORMALLY VAT INCLUDED
234	CDE			COST JUSTIFICATION			CXC			NEUTRAL	DRAFT
235	CDE			COAL FEEDER PRICE			CIC			NEUTRAL	MORE DETAILS OBTAINED
				MORE DETAILS ON PRICE	0.2		CXC			HELPFUL	INFORMATION GOOD
				MEETING ARRANGEMENTS			CXP			NEUTRAL	AN_A & N_A
	CDE	04/29/83	T 2 00	NEETING ARRANGEMENT	0.1		CXP			NEUTRAL	16 MAY NTG N_A & AM_A
	CDE	04/29/83	N 2 0	USE OF PAHL & BEITZ	0.5		C XP			QUESTIONING	
		04/29/83	N 2 0	USE OF PAHL & BEITZ	0.5		C XP			HELPFUL	USE ONLY WHERE IT HELPS
	CDE	05/02/83	W 1 0	A-FORM & DRAFT	4.0		C XR			NEUTRAL	PREP OF FORM & COST JUSTIF.
	CDE			PLAN FOR DAY	0.9		C XP			NEUTRAL	ON TRAIN
	101 1	05/03/83	111 2 10	HEATING/GAS REACTIONS	1.0	1 17	CXP	IYS	10	NEUTRAL	SELLING HIS HOUSE
240	SL_A CDE	05/03/83		HEATING/GAS BEACTIONS	1.0		CXP		- I	NEUTRAL	S1 P TO HELP

Figure 2-2 Sample Interchange Data Sheet





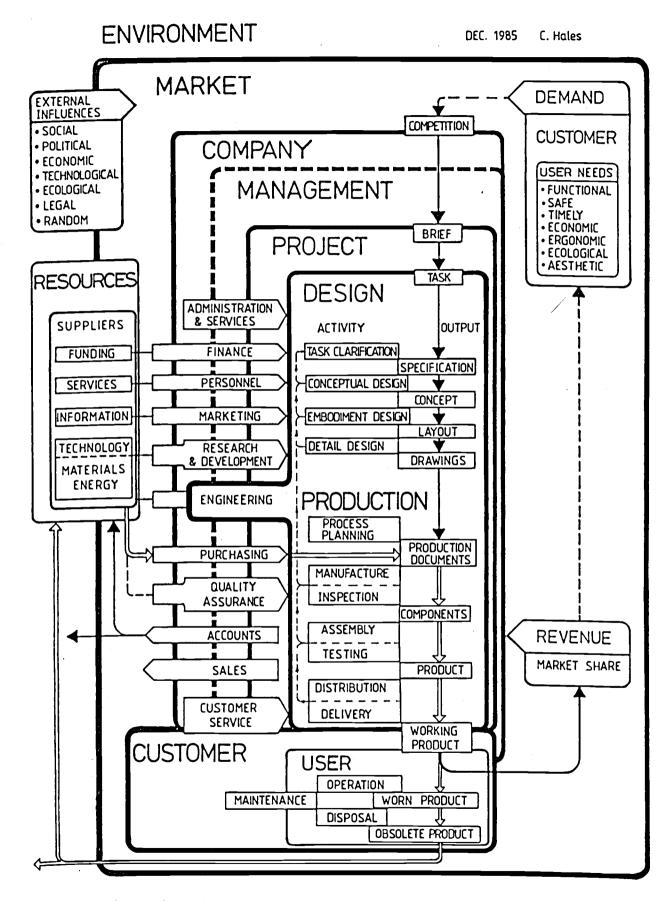


Figure 2-4 Engineering Design Process Set In Context

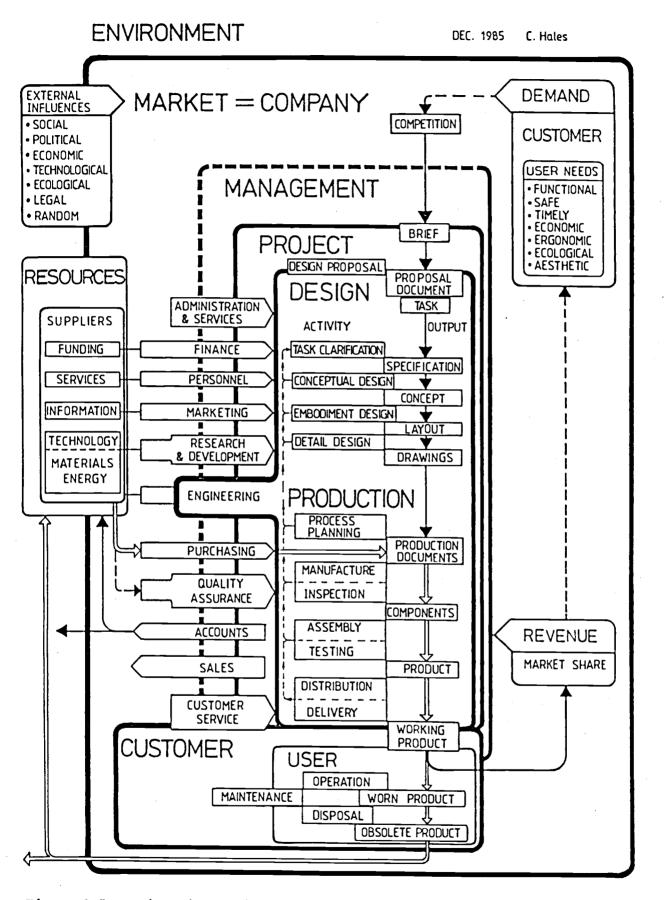
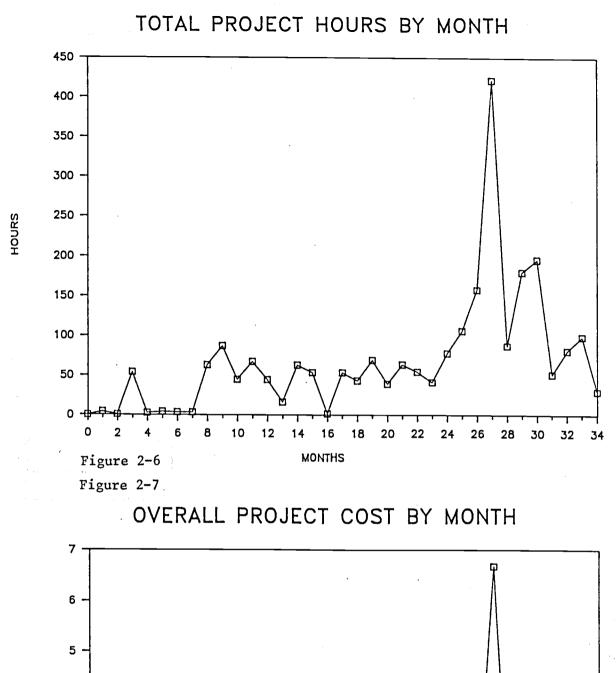
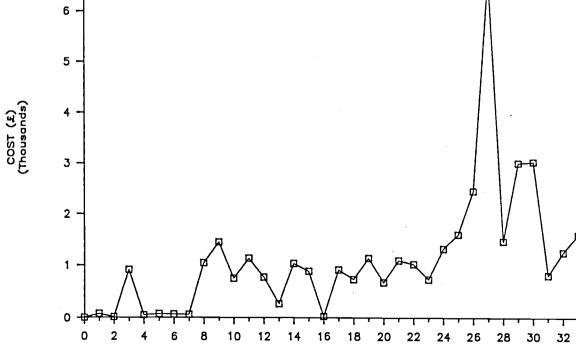


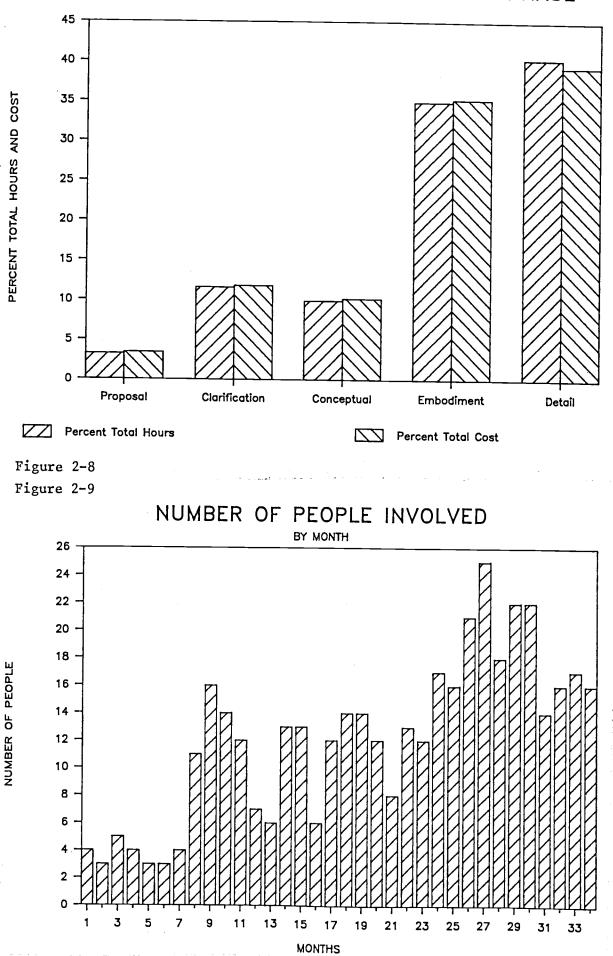
Figure 2-5 Engineering Design Process Set In Context of Gasifier Test Rig Project

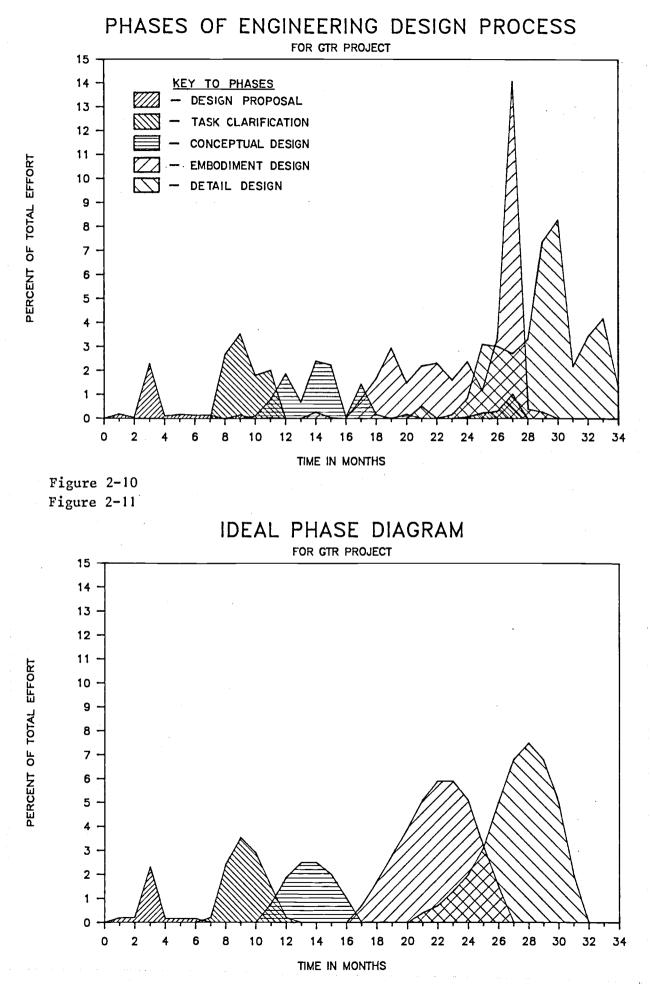


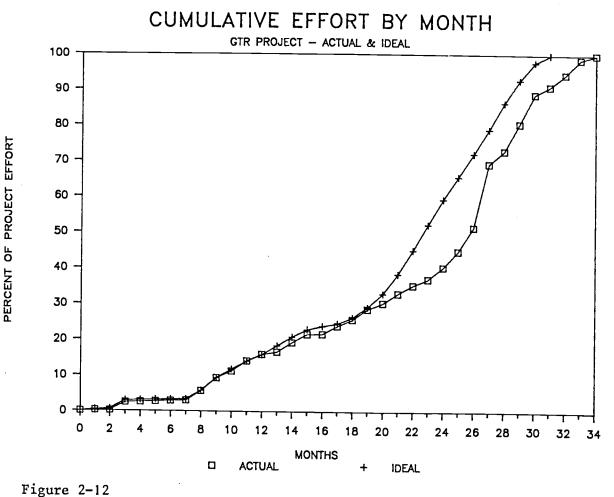


MONTHS

PROJECT EFFORT BY DESIGN PROCESS PHASE

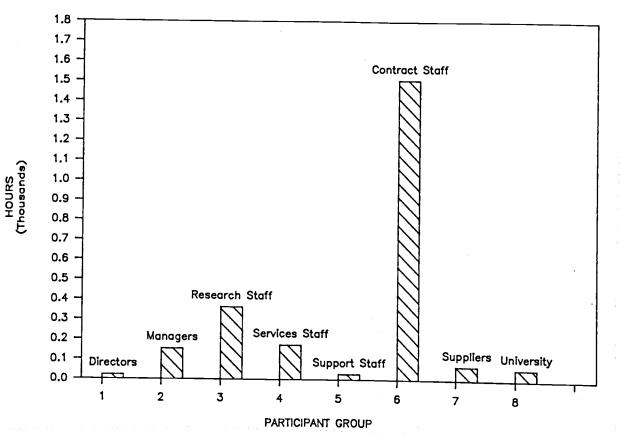






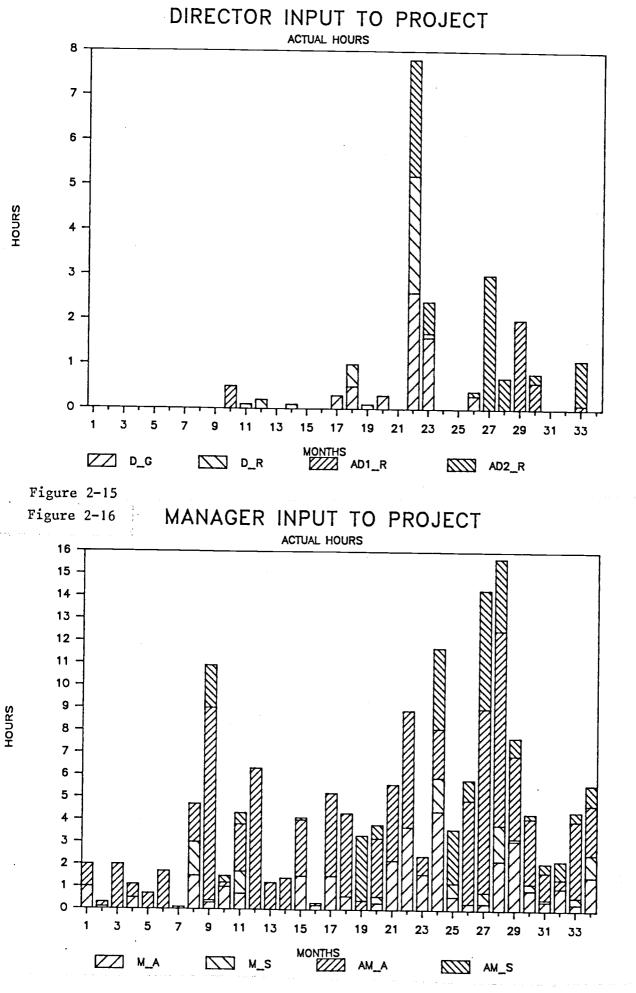


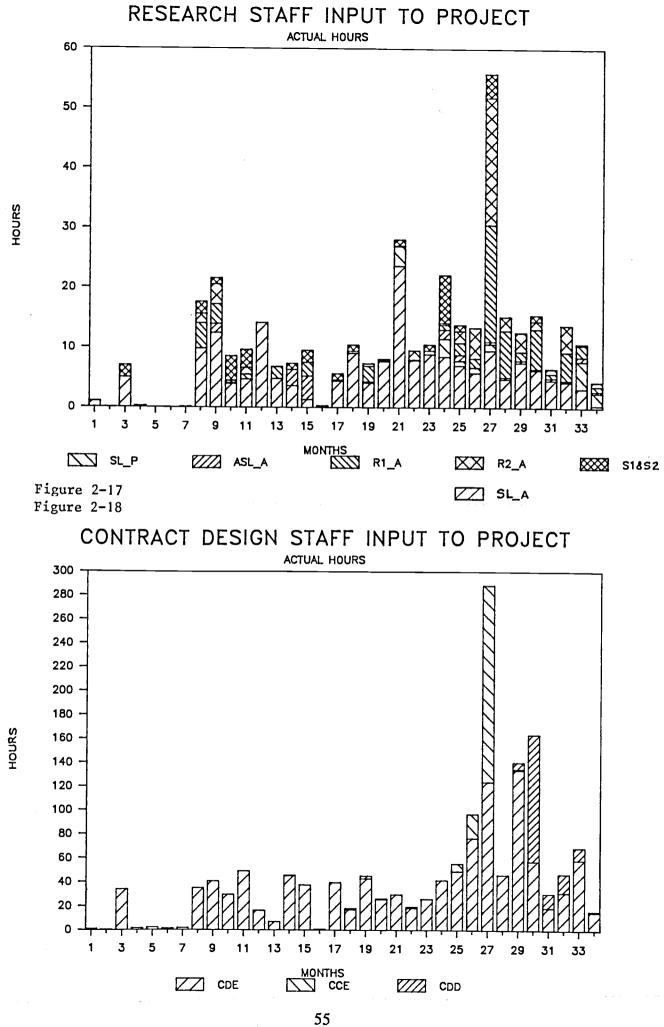
PROJECT HOURS BY PARTICIPANT GROUP

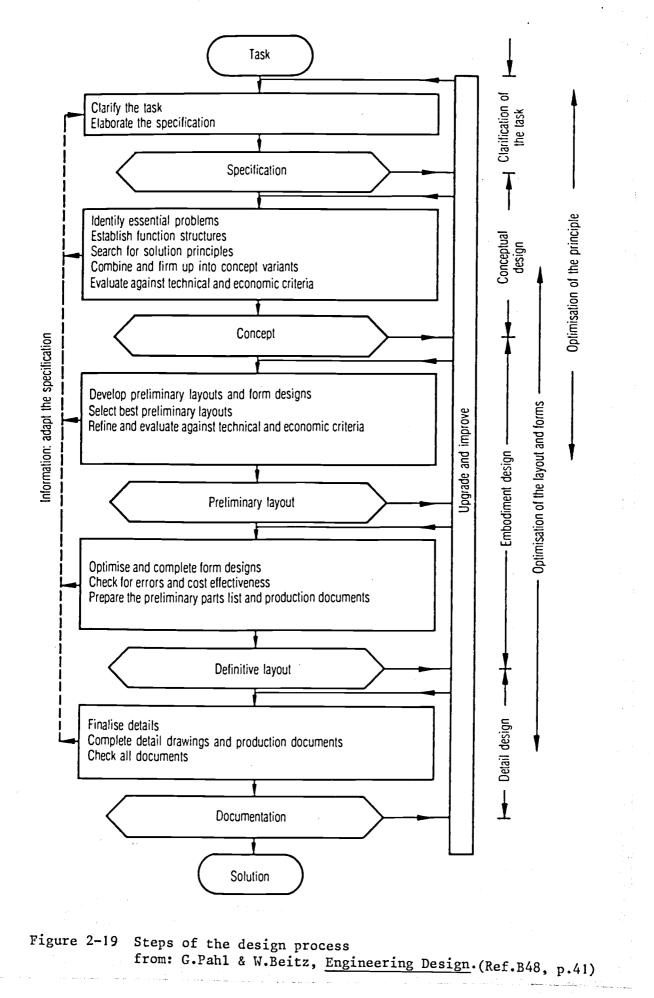


PROJECT	MONTH	T					YE	AR	1		_	_		-						YEAI	2										YEAR	3					HOURS	T OF
GROUP	PERSON	1	2	3	4	5		5	1	8	9	10	n	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	BY	TOTA
DIRECTORS	D_G D_R AD1_R AD2_R											1	C	0		()		() 1)	1	3	0			0		1	2	1			0		6 4 3 8	0.2
WANAGERS	N_A N_S AN_A AN_S	1	-	2		1	1	2	0	2 2 2	0 0 9 2	1 0 0	1 1 2 1	6	1	I	2 1 0		0 : 0 /	2 1	0 t	0 0 3 1				4 2 2 4	1 1 2	0 5 1	0 1 8 5	2 2 9 3	3 0 4 1	1 0 3 0		1 0 1	0 0 3 0	2 1 2 1	32 9 88 25	1.3 0.4 3.7 1.1
RESEABCH STAFF	SL_A SL_P ASL_A R1_A R2_A S1_A S2_A S1_P	1		5		D			0	10 4 2 2	12 2 3 3	4 0 0 4	5 1 1 3		5	3	4	1) 0) 0) 1	0 3 0	0	24 3 0	8 0 2	1	9 3 2 1 0 2 6	7 1 1 2 2 2	6 1 2 5	1 0 20	5 0 8 2 0	8 0 1 3	6 7 1 0 0 0	5	4 0 5 4	3 5 1 2 0	Ō	189 17 15 64 50 15 5 10	8.0 0.7 0.6 2.7 2.1 0.6 0.2 0.4
SERVICES STAFF	BPO_S SO_S DE_S DR_S G1_S									3 2	1 0 3	2					1 0 2			2	5	1		2	0	2 0	1 12 14 4	0 7 18 0	0 17 5 3	2 0 0	5 6 2 0	2 5 0	0 11 1 0		0 8 3 3	0 1	18 2 89 51 13	0.8 0.1 3.7 2.1 0.6
SUPPORT STAFF	C_G QAO_H SO_H DE1_M DE2_M																		0	0	1		0	3	0			1	6 3 1	4		0					3 7 3 14 1	0.1 0.3 0.1 0.6 0.0
CONTRACT Staff	CDE CCE CDD	1	0	34	1	2	2	1	2	35	41	30	49	16	7	46 1	38)	40	17	43 2			18 1		42	49 6	77 20	124 164	46	1	58 106	19	32 16	59 10		1159 195 153	48.9 8.2 6.5
SPECIALIST SUPPLIERS	SE_FE SEI_VA SE2_VA SE_VE SE_FL											0		0	0	0 3 0		0	0	0	5	0					3	10 0 0		0 2 0	0 1 1 0 2	2	_	3 3 1		0	15 17 15 5 17	0.6 0.7 0.6 0.2 0.7
UNIVERSITY	RM_U Lo_u De_u			11		1		1	2	1	4	2	3	7 1		1 0 3			2		1			5	0	0		0 4			0	0 3					40 10 6	1.7 0.4 0.3
MONTHLY TO	DTALS	4	1	54	3	4		3	3	63	87	45	67	45	16	63	54	1	53	43	69	39	64	55	41	78	106	158	422	87	181	196	52	81	99	30	2369	100
OF TOTAL	HOURS	0.2	0.0	2.3	0.1	0.2	0.	1 0	.1	2.1	3.7	1.9	2.8	1.9	0.7	2.1	2.3	0.1	2.3	1.8	2.9	1.1	2.1	2.3	1.1	3.3	4.5	6.7	17.8	3.1	7.6	8.3	2.2	3.4	4.2	1.3	100	
CUMULATIVE	HOURS	4	5	59	61	65	69		12	135	222	267	335	379	396	458	512	513	567	610	679	718	782	837	878	956	1063	1221	1643	1730	1911	2107	2158	2240	2339	2369		-
CUMULATIVE	x	0.2	0.2	2.5	2.6	2.8	2.9	3.	.0	5.1	9.4 1	1.3	14.1		16.7 All											40.4	44.9	51.5	69.4	73.0	80.7	89.0	91.1	94.6	98.7	100		

Figure 2-14 Work Effort of Each Participant by Month







	Met aids	main		Product planning Selecting the task	Clarifying the task Elaborating the specification	Abstracting to identify essential problems	Establishing function structures	Searching for solution principles	Combining solution principles	Selecting suitable combinations	Firming up into concept variants	Evaluating concept variants
CODE	0	supporting	NO.	Produc	Clarify	Abstrac	Establi	Search	Combi	Selecti	Firmin	Evaluat
MA		d studies tet analysis	01	0	0							
SP	Spec	cification	02		0	0						
AP	Abst	raction	03			0	0					
DS/FS		k box representation tion structure	04			0	Ø					
LS	Liter	ature search	05	0	0			Ø			0	
NS		natural systems	06				0	0				
KS	Analysis	known solutions	07		0		8	0	0		0	
AS		mathematical – physical relationships	08				8	Ô				
ES	Tests	s, measurements	09					0	0		0	
BS/TS	Brain Syne	nstorming ctics	10	0	-			0				
SS	System	natic study of physical processes	11					0				
CS	Class	ification schemes	12					0	6			
DC	Desig	n catalogues	13		·			0	0			
SK/II	Sketo Intuit	thes ive improvements	14					0	G		0	1
SL	Selec	tion procedures	° 15			·	0	0	0	0	0	
EM	Evalu	ation methods	16									0
VA	Value	analysis	17							0		0

Figure 2-20 Correlation of 'methods and aids' with the steps of the Conceptual Design phase, showing codes used for Gasifier Test Rig Project. Table taken from G.Pahl & W.Beitz, Engineering Design. (Ref. B48, p.410).

Production Assembly Quality control Transport Operation Maintenance SL Selection procedures 15 FT/RR Fault-tree analysis 23 FT/RR Fisk reduction 23	CODE SP FS SC - CK OG DG	Steps Methods and aids main supporting Specification Function structure Solution concept Solution structure Solution concept Solution methods during conceptual phase Checklist Basic rules: simplicity, carity, safety Principles Force transmission Division of tasks Self-help Stability and planned instability Guidelines Durability (Stress) - Deformation Stability Resonance Expansion Creep Retaxation Corrosion Wear Ergonomics Stabade	NO. 02 04 19 20 21 22	C Specifying spatial constraints	O O Identifying main function carriers	O 3 6 0 Developing preliminary layouts of main function carriers	O O I Iayouts	O O O Developing preliminary layouts for the remaining main function carriers	O O O I Searching for solutions to auxiliary	O O O Developing detailed layouts of main Iunction carriers	C C Developing detailed layouts of auxiliary function carriers	O O O O O O O O O O O O O O O O O O O	O Evaluating	O Preparing definitive layout	OOO disturbing factors and	Preparing preliminary parts list and production dominants
Risk reduction 23		Wear Ergonomics Standards Production Assembly Quality control Transport Operation Maintenance Selection procedures					•		0							-
	EM	Risk reduction Evaluation methods	23 16						0				0		0	

Figure 2-21 Correlation of 'methods and aids' with the steps of the Embodiment Design phase, showing codes used for Gasifier Test Rig Project. Table taken from G.Pahl & W.Beitz, Engineering Design. (Ref. B48, p.411).

Steps		_	0	25%	50%
Claritying the task		10 %		1	1
Abstracting to ider	ntify essential problems	1 %	1)		
Establishing functi	on structures	4%	1 🗖		
Searching for	ntuitive e.g. brainstorming	4%	1 🗖		
solutions of	discursive	15 %			
Combining solutio	n principles and selecting qualitatively	3%			
Firming up into	Preliminary calculations	25 %		3494	
concept variants	Preliminary layouts	35 %	Aug to Description	andret for all and a	
Evaluating concept	t variants	3%			
		100 %	1'		1

Figure 2-22 Estimate of percentage breakdown of design effort in hours spent on Conceptual Design phase from G.Pahl & W.Beitz, Engineering Design. (Ref. B48, p.413).

PHASE	CO	DE	OBSERVED STEPS	DESIGN PROCESS MODEL
Design Proposal	Ρ-	PP ST X	Product Planning Selecting Task Remainder	 Task Clarify the task Elaborate the specification
Task Clarification	Т -	CP SP X	Clarifying Problem — Specification Prep.— Remainder	Specification Abstract to identify the essential problems
Conceptual Design	C -	AP FS SS CP SC CV EV _X	Abstract Problem — Function Structures — Search for Solutions – Combining Principles – Selecting Combination Concept Variants — Evaluation of Variant Remainder	 Establish function structures Overall function = sub-functions Search for solution principles to fulfil the sub-functions Combine solution principles to fulfil the overall function Select suitable combinations Firm up into concept variants
Embodiment Design	E	RC SC FC PL SL ML SS DL AL CL EL OD RD PD X	Review Concept Spatial Constraints Identify Function Car Preliminary Layouts Select Layouts Main Layouts Search for Solutions- Detailed Layouts Auxiliary Layouts Check Layouts Check Layouts Evaluate Layouts Optimise Form Designs Review Design Prepare Documents Remainder	Identify embodiment-determining requirements Produce scale drawings of spatial constraints Identify embodiment-determining main function carriers Develop preliminary layouts and form designs for the embodiment-determining main function carriers Select suitable preliminary layouts Develop the main function carriers Develop to be added to
Detail Design	D	FD ID PD CD X	Finish Drawings — Integrate Drawings — Prep. Final Documents Check Documentation - Remainder	Carriers ensuring compatibility with the auxiliary function carriers
and the second	,	L		Preliminary layout Oplimise and complete form designs
ADDIT	IONA	L AC	TIVITIES OBSERVED	Check for errors and disturbing factors
XP XI XC XR XH XH XS		Info Cost Repo Help	Planning mation Retrieval Estimating rting/Reviewing ing Others al Contact	Prepare preliminary parts list and production documents Definitive layout Finalise details Complete detail drawings Integrate overall layout drawings, assembly drawings and parts lists
19 Ga (1	Step asif Mode	s'& ier ' 1 fr	l for Design Process 'Activities' During Test Rig Project om G.Pahl & W.Beitz: ng Design. Ref. B48)	Complete production documents with manufacturing, assembly, transport and operating instructions Check all documents for standards, completeness and correctness
				Documentation

ACTIVITIES & TECHNIQUES - PROPOSAL PHASE

PROPOSAL PHASE		P		WODV	INFO		NERAL REPORT	UTECI	SUCTAT	TOTAL	% OF
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OF TOTAL HOURS FOR PH	1100	20	6	1	9	3	61	0	0	100	1

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ACTIVITIES & TECHNIQUES - TASK CLARIFICATION PHASE

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X OF TOTAL HOURS FOR P	ULCD	47	18	10	4	2	16	0	2	100	

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ACTIVITIES & TECHNIQUES - CONCEPTUAL DESIGN PHASE

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Figure 2-26

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ACTIVITIES & TECHNIQUES - EMBODIMENT DESIGN PHASE

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Figure 2-27																						

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Figure 2-27

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ACTIVITIES & TECHNIQUES - DETAIL DESIGN PHASE

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Figure 2-28

2000

ACTIVITIES & TECHNIQUES - TASK CLARIFICATION & CONCEPTUAL DESIGN PHASES

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Figure 2-29. For comparison with Figure 2-20 (Pahl & Beitz table)

ACTIVITIES & TECHNIQUES - EMBODIMENT DESIGN PHASE

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Figure 2-30. For comparison with Figure 2-21 (Pahl & Beitz table)

DESIGN EFFORT COMPARISON

Task Clarific	cation & Conceptual Design	Pahl	& Beitz Estim	ate	Gasifi	er Tes	t Rig		
Steps		Time	0 25%	50%	Time	0	25%	50%	75%
Clarifying the tas	k	10 %	2000	T	76 %	analista per			and the Robert Law
Abstracting to ide	entify essential problems	1%			3%		•		ł
Establishing func	tion structures	4%			3 %				
Searching for	Intuitive e.g. brainstorming	4%			8%	L.S.W.		1	
· · · · ·	Discursive	15 %	21.24-5.0-5.		2%				
Combining soluti	on principles and selecting qualitatively	3 %			4%	25			ł
Firming up into	Preliminary calculations	25 %	347-44 SALADA -4276-		2%				1
concept variants	Preliminary layouts	35 %	and a state of the		1%	1			
Evaluating conce	pt variants	3%			1%	•			
		100 %	i		100 %				h .

THE DESIGN EFFORT AS PART OF DESIGN TEAM EFFORT

Task Clarification & Conceptual Design	Gas	sifier	Test	Rig
Design Process Steps	Time	0	25%	50%
Clarifying the task	34.%	and the series	KARA SA SA SA SA SA SA SA SA SA SA SA SA SA	
Abstracting to identify essential problems	1 %])		
Establishing function structures	1 %			
Searching for Intuitive e.g. brainstorming	4 %			
solutions Discursive	1 %			
Combining solution principles and selecting qualitatively	2%			
Firming up into Preliminary calculations	1 %			
concept variants Preliminary layouts	0 %			
Evaluating concept variants	1 %			
Sub-Total	45%			
General Activities				
Personal Work Planning	6%	1		
Information Retrieval	6%			
Cost Estimating	12 %	. Noterror		
Reporting & Reviewing	28%	STREET	the second	
Helping With Other Projects	0 %			
Social Contact	3 %		ļ	
Sub-Total	55%		4	
	100 %			

Figure 2-31 Comparison of Pahl & Beitz Estimate on Percentage Breakdown of Design Effort Spent During the Conceptual Design Phase with Results from Gasifier Test Rig Project

GROUP OR SOURCE	PARTICIPANT OR SOURCE		ICTI F RI		PROI	DUCI F RI			ERAT	LION LG	INFO FOR		TION	TOTALS	BY SO	URCE	
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RESEARCH AND CONTRACT STAFF	SL_A R1_A R2_A S1_A CDE	28 6 4 2 5	7 4 1 1 2	15 1 1	8 1 2 11	10 1 4	11	5 6 1	4 1 4 1	7 1 1 2 3	3	3	2	44 7 12 3 24	24 5 5 3 10	35 1 2 3 4	103 13 19 9 38
MANAGERS	M_A M_S AM_A AM_S		1	1 5		1	2			4 3		2	1 3 1		2 2	4 13 4	2 4 13 6
SERVICES STAFF	BPO_S/SO_S DE_S	1	1	1 1	14		2 2	1		4	16 1		8 2	32 1	1	15 9	48 10
OTHER SOURCES	AD1_R BRAINSTORM CO. STD.	4	13	1	3	6	1	3			4			14 8	19	1	1 34 8
SUB-TOTALS	14 SOURCES	50	30	26	39	22	19	16	10	29	40	9	18	145	71	92	308
TOTALS BY T	YPE		106	·		80	1		55			67	L		308	J	L

Figure 2-32 Breakdown of Requirements Listed in Gasifier Test Rig Design Specification by Source of Contributions and Type of Requirement

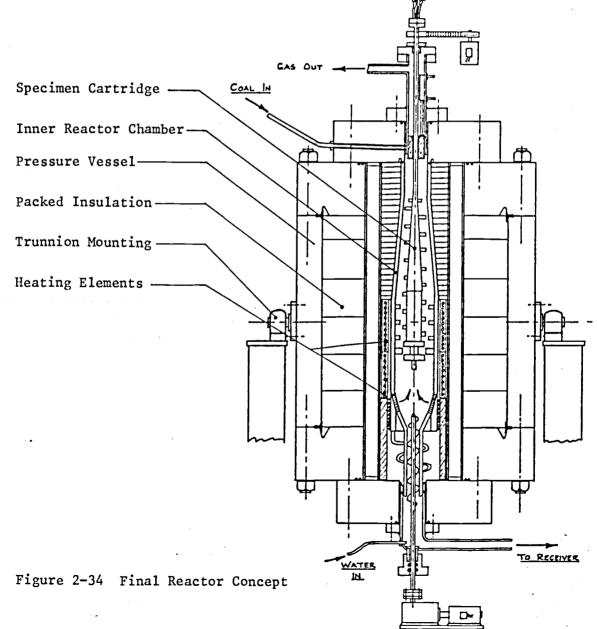
D = Demand

W = Wish

C = Change

SOURCE	FUNCTION OF RIG	PRODUCTION OF RIG	OPERATION OF RIG	INFORMATION FOR DESIGN	TOTALS BY SOURCE
RESEARCH STAFF	77	48	36	21	182
MANAGEMENT STAFF	7	4	7	7	25
SERVICES STAFF	4	18	9	. 27	58
OTHER SOURCES	18	: 10	3	12	[*] 43
TOTALS	106	80	55	67	308

Figure 2-33 Overall Breakdown of Design Specification by Source and Type of Requirement Listed



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INNER REACTOR CHAMBER

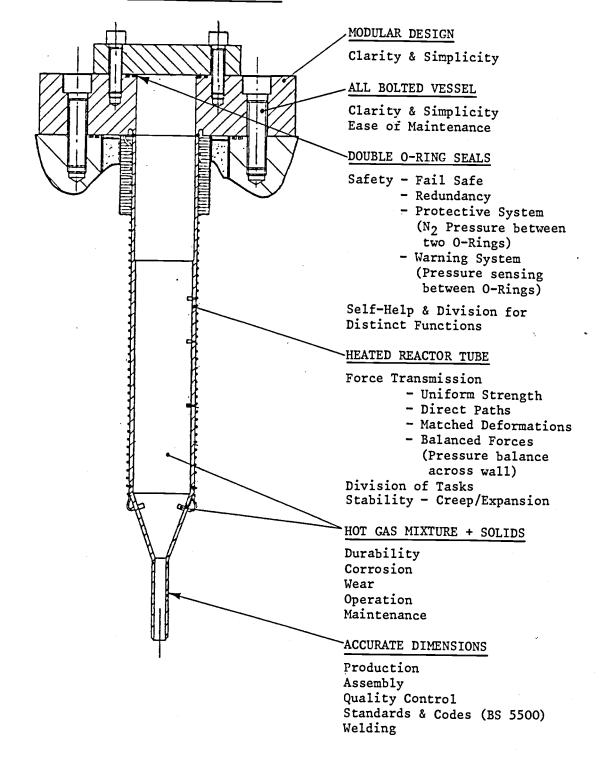
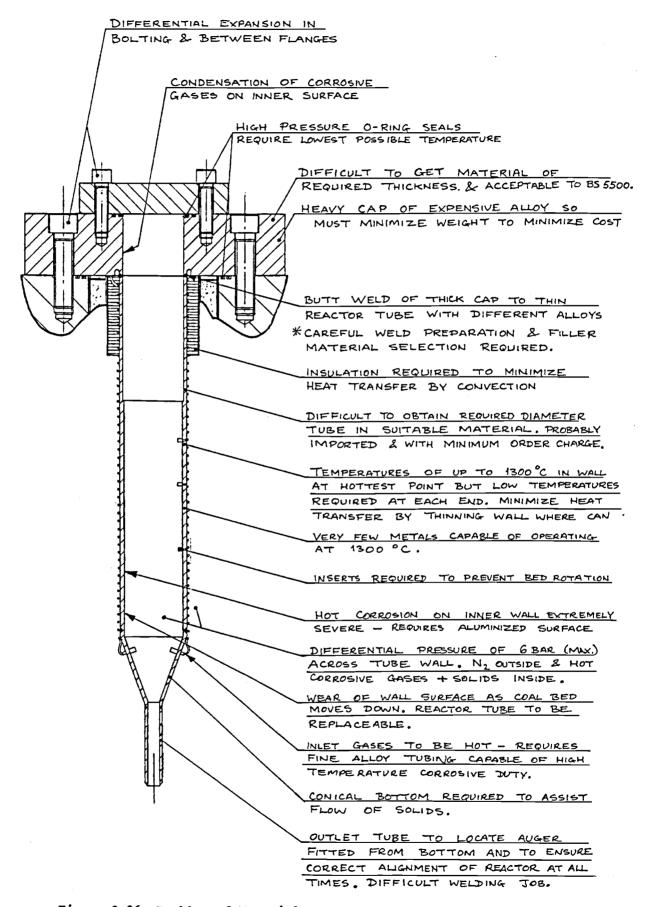


Figure 2-35 Example to show where some of the Embodiment Design 'Rules', 'Principles' & 'Guidelines' were involved

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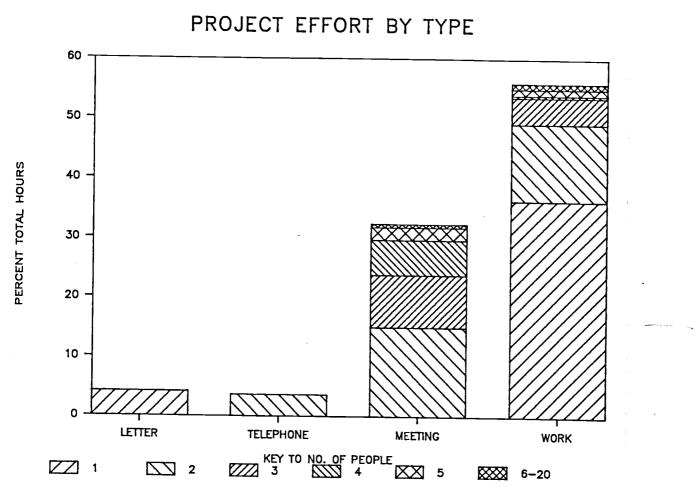
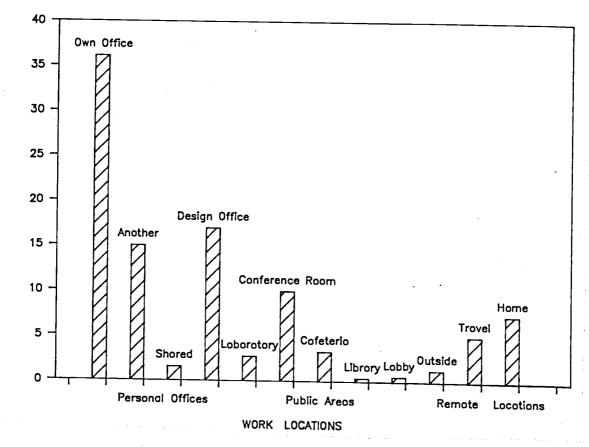


Figure 2-37

Figure 2-38

PERCENT OF TOTAL HOURS

PROJECT EFFORT BY WORK LOCATION

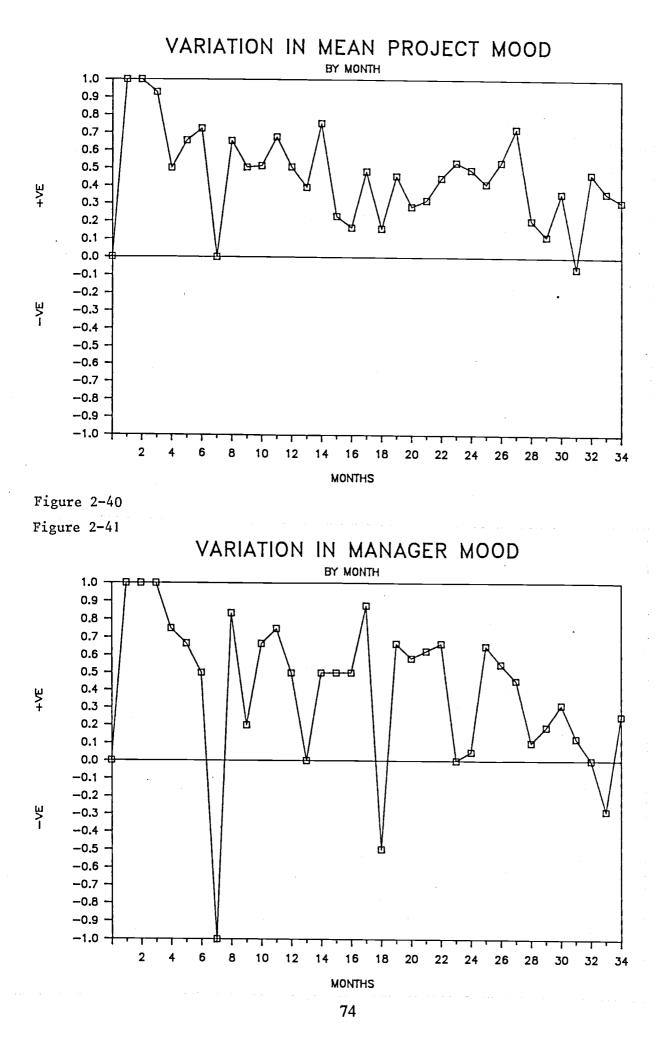


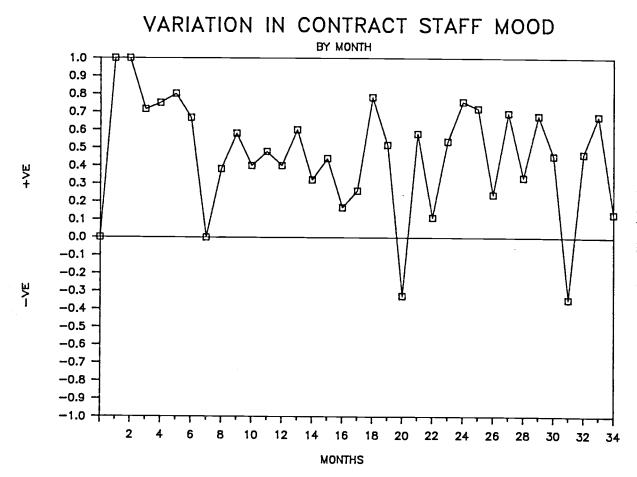
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PROJECT	MONTH							YEA	R 1												YEAR											TEAR						KEAN
C.D.OUD	PERSON	1	2		3	4	5	6		1	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33		OF NOOD
DIRECTORS	D_G D_R AD1_R AD2_R									-			-1.0	1.0	0.0		1.0			0.0	-1.0 -1.0	0.0	0.0		0.0 1.0 1.0	1.0			0.5	1.0	-1.0	-1.0	0.0 -1.0			1.0		-0.1 0.4 -0.3 0.0
WANAGERS	N_A N_S AN_A AN_S		0 I. 0 I.			1.0 0.5	0.7	0.	5 -1		1.0	0.0 0.5	0.5 0.5 1.0	1.0	0.5	0.0	0.5		1.0 0.0			1.0	0.5				0.0	1.0		0.3 0.6	-0.5 0.2		0.3	0.0	0.0	-1.0 -0.1		0.5 0.2 0.4 0.4
RESEARCH STAFF	SL_A SL_P ASL_A R1_A R2_A S1_A S2_A S1_P	1.	0		1.0	0.0					0.5	1.0 1.0	1.0 1.0 0.0	1.0	0.1	0.5	0.8		0.0	-1.0	0.0 1.0	1.0		0.4 0.5 1.0 1.0	1.0 1.0		0.5 1.0 1.0 1.0 0.0	1.0 1.0 1.0	1.0 1.0 0.9	1.0 -1.0 0.8 0.8	0.0	0.3 0.0	1.0	0.0 0.5 0.3	1.0 1.0 0.6	1.0	0.5 -1.0 0.5	0.2 0.7 0.5 0.6 0.6 0.8 0.8 0.8 0.3
SERVICES STAFF	BPO_S SO_S DE_S DR_S G1_S										1.0	0.0	0.7	1.0				-1.0 1.0 1.0			1.0	0.4	1.0		1.0	1.0		0.2 0.1	0.8	0.5 1.0	-0.6) 1.0	0.4 0.7	0.4	-1.0 -1.0 -0.3 -1.0	0.4 1.0	-0.1 1.0	1.0 1.0 -0.3 0.2	0.7 0.8 0.2 0.6 0.7
RENOTE SUPPORT STAPF	C_G QAO_H SO_H DEI_M DE2_N														<u> </u>					1.0	0.0	0.5		0.0		0.0			1.0)	1.0)				0.0 0.8 0.5 0.8 1.0
	CDE CCE CDD	1.	0 1.	.0 (0.7	0.8	0.4	30.	.7 0	.0	0.4	0.6	0.4	0.5	0.4	0.6	0.6 0.0		0.2	0.3	0.6 1.0		0.3 -1.0		0.7 -0.5		0.8	0.6	0.3			3 0.3 1.0 0.7		5 -0.0 4 -0.6				0.4
SPECIALIST SUPPLIERS						•						0.8	1.0		1.0	1.0	1.0 1.0 1.0		0.0	1.0	0.0		0.0					0.9		0.0	5 0.1	0 -0.5 0 0.0 0.0 0.0 0.0))	0	1.0 1.0 1.0		1.0	0.4 0.5 0.5 0.5 0.8
UNIVERSITY SUPPORT	RW_U Lo_u DB_u				1.0							1.0	1.0		1.0		1.0 1.0 1.0			1.0		0.8 1.0				1.0	1.0		1.0	0.1)		0.	1				0.7 1.0 0.8
MONTHLY	WEAN	0 1.	0 1	.0	0.9	0.6	0.	70	.1 ().0	0.7	0.5	0.6	0.8	0.6	0.7	0.8	0.4	0.4	0.3	0.2	0.5	0.4	0.6	0.5	0.5	0.5	0.0	i 0.0	0.	5 0.	3 0.1	0.	4 -0.1	0.6	0.4	0.3	0.5

Figure 2-39 Participant 'Mean Mood' by Month

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CHAPTER 3

QUALITATIVE ANALYSIS OF AN ENGINEERING PROJECT

3.1 Introduction

An analysis based on hours of work effort resulted in characterization of the project according to activities and outputs but it offered no reasons for why things happened the way they did. For example it did not explain why the project took longer than expected, nor why the embodiment design effort stayed at a low level for so long. To investigate such aspects a complementary approach was needed, using the same data but in a different way. Instead of categorizing activities and outputs for each phase of the project, various 'influences' acting on the project during each phase were identified and categorized, at five levels of resolution. This led to a qualitative characterization of the project in terms of its context, which could be used to support the quantitative results.

The Context Model used in Chapter 2, and reproduced in Figure 3-1 with the 'resolution levels' annotated, helped in structuring this more qualitative analysis. At each level the project is considered in terms of 'categories of influence' and 'contributing factors', identified from the literature as likely to be important in engineering design. Particular incidents or events from the project are described, which characterize the view of what happened from each resolution level and typify the influences which were observed. Based on this an attempt is made to assess the effectiveness and efficiency of the engineering design process and the success of the project, as seen from several viewpoints. Figures 3-1 to 3-7 have been grouped together at the end of the chapter for easy reference.

3.2 Influences and Viewpoints

3.2.1 Terminology and Background

Influences may be defined as 'people or things having power', with power as 'the ability to affect outcomes' [Lawrence and Lee (D12)]. The 'goal-orientated' engineering design process cannot be effective unless the balance of influence (as 'power in operation') favours the attainment of project goals as distinct from goals at other resolution levels. A five-year study in the U.S. by the Hughes Aircraft Company (D10) on improving productivity in technology-based organizations resulted in a practical set of checklists and guidelines for compensatory control of influences acting on particular research and development situations. Most of the influences identified during that study also apply in the case of engineering design, and advantage was taken of this in generating the lists used here. It was determined that influences may be categorized as slowly-changing (fixed) or continuously-changing (variable), and as favourable ('facilitators') or negative ('barriers') to the project [Rubenstein (C27)].

The concept of identifying and categorizing 'influences' for this project came from ideas suggested by Lewin's field theory in social psychology (D15) combined with Rodwell's set of scales for 'profiling' design tasks (D18) and Gregory's contingency model of design (C10). First attempts to list the influencing factors and so 'profile' the design context [Wallace and Hales (C33)] proved rather clumsy, but led to the better defined list reported two years later (C34). Humphreys (B33, B34) and Carter et al. (B12) have suggested taking longitudinal 'slices' through a project to map variable influences with time, and lateral or crossectional 'time slices' to map the balance of influences at a point in time. At each resolution level [Wallace and Hales (C34)] there appears to be a mixture of slowly-changing 'structure orientated' influences such as corporate organization, and continuously-changing 'process orientated' ones such as 'enthusiasm' and 'involvement'. If such influences could be more clearly defined, for example by using the assumption that individuals and groups tend to react in predictable ways to most influences [Handy (H14)], it might eventually be possible to use them as 'constants' and 'variables' for analytical purposes (D20). This would require data from many more projects and could not be attempted here. Analysis was limited to the identification of categories of influence and contributing factors within each category, with subjective assessments of their observed impact.

The following criteria were used in determining each contributing factor within each influence category:

- (i) Did it seem to affect the engineering design process?
- (ii) Was there evidence to show this?
- (iii) Is the term used generally accepted and unambiguous?
- (iv) Does it accord with the Context Model?
- (v) Does it form a coherent set when combined with others?
- (vi) Does it help characterize the project?
- (vii) Could it perhaps be assessed on some qualitative scale?

3.2.2 Macroeconomic Level

Seven broad categories of 'external influences' are shown on the Context Model, and for the most part their inclusion is self-evident. The impact of all these is discussed in papers concerning the design of large plants such as the Three Mile Island nuclear power station [Coaker (F1)], and there are numerous examples in the literature concerned with the impact of individual ones. For example Kagan and Van der Water (F5) and Smith (F10) deal specifically with the impact of legal influences on the engineering design process. 'Random' influences are taken to include the effect of 'luck' and 'chance', it being assumed that there is usually an attempt to maximize the benefits of good luck and minimize the effects of bad luck.

External Influences

At the start of this project the political and economic forces in Britain favoured development of coal gasification as an alternative energy source, and within the Company there was emphasis on coal gasification research. In particular the group which originated the idea of the Gasifier Test Rig was concerned with evaluating materials for use in the components of full-scale slagging gasifiers, where the temperatures and pressures are extreme and the internal environment is corrosive and abrasive. The strength of the group lay in its expertise on material properties and the test rig was seen as necessary to provide data for its future research. It was on this basis that the original proposal was accepted and the project initiated.

At the end of the conceptual design phase a document describing the test rig concept was circulated within a company-wide 'materials working party' by the project manager, to find out what level of support for the project existed in other areas of the Company. The feedback from management most closely connected with Company policy on coal gasification was questioning rather than encouraging, and in a letter to the contract design engineer on 18 August 1983 the project manager wrote: "To some extent the climate has changed ... I am afraid it does mean that I cannot progress the A-form immediately as I had hoped ... "With reference to Figure 2-10 it will be seen that in Month 18 (August 1983) embodiment design effort was building up, but one month later it fell off again and remained at a low level for the next five months. This was a period of indecision for the project management, resulting largely from changes in Company policy towards coal gasification research, and the project suffered. Although the project was continued through detail design the effect of these external influences grew stronger, and on 4 March 1985 (3 months after data collection had ceased) the project manager wrote: "This letter is to confirm that we are not able to go ahead with the gasifier test rig at this point in time." In the wider context this resulted

from changes in Government policy for the purchase of natural gas from Europe, at prices making the use of synthetic natural gas (SNG) uneconomic well into the future.

By comparison with these political and economic influences, social, technological, ecological and legal influences were insignificant. However if construction of the rig had gone ahead as originally planned this would have been different. For example the immediate area around the Company's property was being rapidly developed from a run-down industrial zone to an 'up-market' residential zone, and there was increasing pressure on the Company to ensure that it released no pollutants. The gasifier test rig would generate a small volume of hydrogen sulphide and, despite inclusion of an efficient gas scrubber in the system design, additional precautions for operation under emergency conditions were being discussed.

Random influences affected the project in many small ways. An example was the chance interchange between the contract design engineer and a Company director for SNG during a visit on 18 April 1984, when, despite his lack of support for the gasifier test rig project, the director said that he had passed the reactor assembly drawing on to one of his senior engineers who had commented favourably on a number of technical features. This gave some welcome encouragement in Month 26, just as a final push on embodiment design was beginning. Bad luck also took its toll. The most significant event was the hopitalization of the contract design engineer due to peritonitis in Month 16, just at the end of the Conceptual Design phase when the A-Form (cost justification) was to be submitted. As noted in Chapter 2 and shown in Figure 2-10 the project effort was zero for this month, and the momentum built up during conceptual design was lost. If the A-Form had been submitted when planned it may well have been approved before the negative political and economic influences had an impact on the project.

Figure 3-2 lists the external influences identified, with a subjective assessment of their observed impact on the project. Literature sources coded against each item are detailed in the References and Bibliography following Chapter 5.

3.2.3 Microeconomic Level

Economics as a discipline has a well-defined and accepted terminology and this made it relatively easy to list categories of influence at the micro-economic level, but identifying contributing factors from an engineering design viewpoint was difficult. The list in Figure 3-3 was found adequate for this project, with contributing factors grouped according to three main categories of influence: Market; Resource Availability and Customer.

Market

Although the market for the Gasifier Test Rig was within the Company, it was not confined to the research group that initiated the project. On offer to potential customers was the possibility of doing experiments in an operational high-pressure, high-temperature facility, tailored to their specific needs at minimal cost. The general demand for such a facility was never actually quantified, as the cost justification had been based on the need for particular long-term materials tests. This need diminished during the course of the project, and so went the purported justification for building the rig. It did not mean that the rig had no market but that the marketing approach which seemed the best at the time turned out to be a poor choice in the end. Various groups in the Company were interested in the rig, the competition being from simpler equipment often unable to provide adequate simulation of the real environment. The problem was that if the rig was dedicated to long-term materials tests the availability for other work was too low for other groups to contemplate helping to fund the project. This point was raised during the tape-recorded meeting held on 9 February 1984: an enquiry as to the cost of building additional reactors.

Resource Availability

Sufficient resources were available for the design effort except for the lack of a qualified detail designer, and a problem in obtaining accurate information regarding gasifier operating conditions. Unlike the control system design, where it was up to the project team to secure the services of a design engineer, detail design was under the control of a Services Group, and the recruiting of individuals for this was outside the control of the project team. When the time came for detail drawings to be done no qualified person was available to do the work. What is more it took six further months to attract a suitable person and, as shown in Figure 2-10, this caused a severe discontinuity in the project effort. The project had not been funded for construction so the project team had little power over the situation. With regard to information needed on gasifier operating conditions there was strict confidentiality on such information within the Company. It was taken to such lengths that the rotational speed of a major component, essential for calculating the specimen movement in the rig, was wrong by a factor of 4 when told to the contract design engineer. The point here is not only that the contract design engineer wasted design effort because of wrong information, but that this information was being used by permanent Company staff in the absence of anything better.

Customer

The customer for the Gasifier Test Rig was the Company itself, but represented by individuals within the Company. The research scientists who planned to operate the rig themselves were classified as 'users', and the directors responsible for the funding were classified as 'customers'. Between these were four hierarchical levels: Assistant Director; Manager; Assistant Manager and Section Leader. At each level there were people involved who would see themselves as part 'user' and part 'customer'. To simplify the matter all those at Manager level and above were regarded as the customer, while all those at Section Leader level and below were regarded as users. Assistant Managers, as they would neither use the equipment directly nor sign for the funding, were considered project managers but not users or customers. Based on these assumptions it was established that in the first instance the customer's need was not quantified and that the project could not be considered urgent. The customer was keen to be involved with technical aspects of the design, helping in the development of the design specification for example, but had over-optimistic expectations regarding the capabilities of such a rig. This is illustrated by a chance interchange involving a Section Leader, the Contract Design Engineer and an Assistant Director in the lobby on 30 January 1984 (Month 23) during which the Assistant Director suggested that the name of the rig be changed to Gasifier 'Simulator' to reflect what he felt its capability would be.

Figure 3-3 summarizes the observed impact of factors within the categories of influence identified at the microeconomic level, together with the coded list of relevant literature sources.

3.2.4 Corporate Level

Organization theory is not a unified whole but a loosely associated set of theories based on various viewpoints and concerned with different aspects [Dunkerley (H5)]. Opinions and terminology vary widely, and the number of influencing factors is large. From an engineering design viewpoint it was found difficult to determine which influencing factors were likely to be important, because although the production process is referred to in many organization theories very few even mention the engineering design process [Wearne (H46)]. By drawing from a wide variety of sources the list shown in Figure 3-4 was compiled, and the contributing factors were categorized according to the 'McKinsey 7-S Framework' from Peters and Waterman (H35). Other sources found particularly helpful at this level were:

- Power and influence: Handy (H14); Lawrence and Lee (D12);
- Structure of organizations: Mintzberg (H25); Pugh (H37);
- Management style: Likert (H37); Lupton (H24);
- Management skills: Dale (H4); Topalian (H42).

Corporate Structure

The project setting was in one small part of a large national corporation, and although this did not change during the course of the project it did influence the project context. For example, if the Company had not been a monopoly or had it been international, it is unlikely that the five-month period of indecision over the future of the project would have lasted so long, or that detail design would have continued without a final decision. Further criteria such as market potential for commercial materials testing would most likely have forced the decision one way or the other. Other factors observed to contribute to the effect of corporate structure on the project were: the complexity of the Company; the low organizational flexibility afforded the project; the mixture of help and hindrance from centralized services such as Safety and Quality Assurance and the low level of project autonomy allowed the project.

Corporate Systems

Six factors related to the way the Company operates were observed to have an effect on the project:

- (i) The integration or lack of integration between various groups;
- (ii) The degree to which available information was used;
- (iii) The technical complexity of the whole area of coal gasification;
- (iv) The physical environment in which the design effort took place;
- (v) The social environment existing within the Company;
- (vi) The payment and benefit system.

The positive and negative effects of each of these was demonstrated many times during the course of the project. A few examples are given below:

(i) Integration - The element of competition between various research groups in the Company was not found beneficial from the engineering design viewpoint as the available technical support could not be used to full advantage and information tended to be witheld.

- (ii) Use of Information Outside companies were used extensively for obtaining technical information, and in general the response was excellent. For example from the field notes on 22 September 1983: "Wrote 9 letters for information: Fine Tubes; BSC; ICI; Carbolite; Carborundum; Henry Wiggins; Wainwright; Holo-Krome and Unbrako." All replied within 7 days. Actually, almost all the information required for the design of the test rig existed within the Company, but it was often difficult to locate and obtain at the time. In addition there was the problem of confidentiality mentioned before.
- (iii) Technical complexity When coal is heated (without excess oxygen) it continuously and irreversibly changes in character going through defined stages. It devolatilizes, swells, plasticizes, hardens and breaks up, at temperatures which depend on the type of coal and the pressures involved. The process of coal gasification depends on so many factors and the conditions are so extreme that design issues for the test rig were inherently complex.
- (iv) Physical Environment It was shown in Chapter 2 that only 17% of the design effort took place in the 'design office' while most took place in individual offices, and at certain times the effect of the physical environment was observed to be important. In particular the need for space to lay out drawings during embodiment and detail design was a problem, as recorded in the field notes on 13 April, 1984: "Persuade DE_S and DR_S to clear top of drawing file with my assistance - no flat surface to lay things out in whole office."
- (v) Social Environment The sociable environment in which the project took place had the advantage of encouraging informal communication between participants and groups, which helped overcome the problems of obtaining information within the Company.
- (vi) Pay and Benefits Both the pay and the benefits offered by the Company were considered good by most team members, and in the case of one or two were the main reason for them staying in their jobs. From the Gasifier Test Rig viewpoint, however, the influence of pay was quite different from the influence of benefits. Whereas the level of pay was observed to act as an incentive ('facilitator'), particularly with the contract staff, the benefits in the form of vacation time, holidays, 'sick time', 'flexitime' and personal freedom were observed to cause unpredictable disruptions in project progress ('barriers'). The type of problem this caused within the project team is illustrated by a notebook entry on 9 April 1984: "Holiday schedule: J___ in until 19th, then away 1 or 2 weeks; R___ in until Easter; F__ away 16-27 April and again 13 May to 23 June; H___ away 2 weeks after next week; Easter Holiday 20-23 April; Bank Holidays 7 & 28 May."

Corporate Strategy

The five-month period of indecision regarding funding of the project would suggest that, at the time, the corporate strategy on coal gasification research was not clear, at least not to those responsible for approving funding for the Gasifier Test Rig. It also indicated a reluctance to take risks. To proceed with the detail design work but not the application for construction was a way of 'hedging one's bets'. These were important factors, as a slightly clearer strategy might have forced the decision against the project much earlier, and a slightly less cautious approach would almost certainly have favoured construction. In the literature [particularly Peters and Waterman (H35)] 'innovation' (implementation of a design or new ideas) is seen as an important influencing factor at the corporate level. The Gasifier Test Rig was regarded as 'novel' in design but until built and operating it could in no way demonstrate 'innovation', so although this contributing factor was considered important the data from this project could provide no evidence for this. It would seem that innovation and risk-taking are interdependent: had the more risky decision to build the rig been taken, and had the rig performed as expected, then it is likely that the project would have been seen as innovative. Another factor often stressed in the literature is corporate 'involvement'. For this project such 'corporate involvement' (i.e. higher level than project management) was intermittent, as was seen in Figure 2-15, and it was either at the request of the project team or as a result of a chance interchange. No unsolicited corporate involvement was observed, and as far as the project team was concerned this was seen to indicate a lack of commitment towards the project, acting as a negative influence.

Shared Values

As with corporate involvement, the 'commitment' and 'enthusiasm' that are regarded as important factors in Company 'shared values' were observed to be intermittent and variable as regards the Gasifier Test Rig project. This was a common topic of conversation within the project team, as it clearly affected the future of the project. For example on 7 February 1984: "...M. thinks we would be on a sticky wicket if we rode along on the director's enthusiasm." (Field Notes). To confirm such statements more data was required and it was not difficult to obtain. Several 'chance' interchanges were used to test the level of commitment and enthusiasm, and the project team members were found to be accurate in their assessment.

Management Style

The approach regarding factors categorized under management style was to include four main 'styles' commonly referred to in the literature and to assume that in the real case a mixture of these would exist. The interest was then in the dominant style observed, and its possible effect on the project. Of the four styles: autocratic; benevolent; consultative and participative, the benevolent style was most in evidence. It was observed at all levels of management. Concern for an employee's personal problems and health sometimes took precedence over concern for the project, and personal vacations could be scheduled at any time. 'Flexitime' gave additional personal freedom, and the working atmosphere was generally relaxed. Thus the predominantly 'benevolent' style of management tended to favour the team members at the expense of the project, and this acted as a negative influence as far as project progress was concerned.

Management Skills

Traditionally management skills have been grouped under headings such as planning, organizing, directing, coordinating, and controlling, but more recent studies of what managers actually do [Mintzberg (H25); Peters and Waterman (H35)] have turned attention towards communicating, representing (e.g. project or product 'champions'), and using resources effectively. As far as the Gasifier Test Rig project was concerned the more traditional group of headings was seen as the management output needed for the project to exist, while the latter group was seen as the management activities to produce such output. All the headings were seen as factors which would influence the project, but as the study was concerned with the engineering design process rather than overall project management the data collected on these factors was limited. Management planning, organizing and coordinating were clearly in evidence as positive influences, but with the complexity of the corporate structure and systems it was not possible to specifically identify the effects of 'direction' and 'control'. For example the project manager's monthly cost sheets were in terms of people rather than projects, and in terms of 1/10th days rather than hours. The measurement of project effort in 1/ 10th days would have been virtually impossible from a field research viewpoint, especially with Fridays having shorter hours than other days. Although an attempt was made to flag all the costs and effort attributed to the Gasifier Test Rig by means of an extra digit on the job number, this digit was not recognized by the computerized accounting system. The project manager was surprised at the small number of total hours (2368) recorded by the participant observer: "It had seemed to be more than that", but an approximate check through the manager's cost sheets confirmed that the total project effort was about 1 1/2 'man-years'.

There was evidence to show the influence of communication, represention and resource utilization on the project. In general communication and representation at the corporate level were positive influences, but the effects were intermittent. Resource utilization, judged on the basis of numerous comments from project team members, could have been considerably higher had circumstances been different, and this would have helped to overcome the various delays encountered.

Management Staff

The literature suggests that the number of management staff, and their awareness, judgement (decision-making), motivation, morale and confidence, would be likely to influence the project. In general terms this was found to be so, but as the data was from only one project with relatively little manager input, there was insufficient evidence to more than confirm that these factors did have some effect. For example, if the management had been more confident in the operability of the rig, and the availability of staff to run it, the potential risk may have been perceived as lower, and the application for funding might have been approved. This is hinted at in the final letter from the project manager dated 4 March 1985: "Another matter which concerned us and led to some hesitation on my part... was the knowledge that the effort in terms of manpower that would be needed to get it off the ground and running successfully would be difficult, if not impossible to find within our Group. Experience has taught us that it would be unlikely to be forthcoming from anywhere else..."

The influence categories and contributing factors at the corporate level are summarized in Figure 3-4, together with an assessment of their observed impact and a literature source list.

3.2.5 Project Level

At the project level it was found that the factors could be grouped into four categories of influence: Task; Team; Techniques; and Output [Rodwell (D18)]. Useful sources from the literature were:

- Design Task: Rodwell (D18); Hykin (C13); B S 6046 (I5);
- Design Team: Belbin (I2); Biddle (I3); Hales (I12); Lee (D13);
- Design Tools: Leech & Turner (A38); Finkelstein (B23); Jones (B36); Pahl & Beitz (B48); Hajek (I11); Rodwell (I22).
- Design Output: Rodwell (I22); Arup (I1).

The factors identified within each category are shown in Figure 3-5, and are discussed below with some examples from the project.

Design Task

Hykin and Laming (C14) suggested preliminary scales for the measurement of the 'complexity' and 'magnitude' of engineering design projects, while also considering the effects of production quantity and novelty. At the same time Rodwell (D18) was interested in developing a way of classifying different types of project, and proposed an approximate set of comparative 0-5 scales for profiling a project in terms of Magnitude (M), Complexity (C), Novelty (N) and Production Quantity (Q). The variable 'commercial and design progress' was also mentioned, but did not fit the pattern as it is dependent on time, and it has been categorized here as 'design output'. The profile for a particular project was considered fixed (theoretically the values could vary with time), and was expressed as a letter and number sequence. Using Rodwell's notation the Gasifier Test Rig design task profile was assessed by the project team as being M3-C4-N4-Q1, or medium magnitude, high complexity, high novelty and very low production quantity. Previous projects completed by the same project team, but excluding the participant observer, ranged from M1-C1-N3-Q1 to M2-C2-N2-Q1. Assuming that the capability of the team had matched the design task profiles for previous projects, the inclusion of the participant observer in the design team for the Gasifier Test Rig could be seen as an attempt to reduce a mismatch between perceived capability and the new task profile.

Two other contributing factors were identified in this category, these being 'technical risk' and 'urgency' or delivery time. Both were found to influence the project, the high technical risks weakening the resolve of the management to see the project through, and the lack of urgency making it difficult to sustain sufficient project momentum.

Design Team

It is suggested in the literature that an ideal engineering design team should be: competent; experienced; well-balanced; cooperative; committed; and motivated! Other contributing factors identified were: morale level; negotiating ability; strength of power base within the company; end-user involvement in the design effort; and the match of design team composition to project requirements in each phase of the work.

With so many 'team' factors likely to affect the project it appeared that the design team composition would be an important aspect, and the evidence supported this. Expertise and experience, closely followed by motivation and commitment, were observed to be critical factors. When the team had suitable expertise and experience the project progressed, when it lacked these it stood still. To some degree this was shown in Figure 2-10, and it helps to explain the 'peaky' nature of the work effort. The month when almost twice the effort went into the project than in any other was when the contract controls engineer from Chicago temporarily joined the team. This engineer had not

worked outside the U.S.A. before and was therefore operating in a foreign environment. However he had both the expertise and experience needed for designing the control system, and the motivation and commitment to see this part of the project through. From the morning of Saturday 12 May 1984, when he was met at Gatwick Airport by the contract design engineer, to the Saturday morning two weeks later when he flew back to Chicago, there was a marked change in the performance of the team. He was immediately accepted for the missing expertise and experience which he could provide, and for those two weeks he brought to the project a sense of purpose and urgency strong enough to ensure that the entire control system was designed within the two weeks. The Process and Instrumentation (P & I) diagram involving over 100 valves was completed; the seven control panels were detailed; sensor tables, valve operating sequences and shutdown procedures were drawn up; a report was issued for use in the hazards analysis and in obtaining bids for construction; and a 2-hour presentation meeting was held. Vacations were rearranged, a valve manufacturer offered enthusiastic help, management interest in the project was revived, and the project manager wrote to the contract controls engineer on 29 May: "The amount you accomplished in such a short time is beyond belief...it is very reassuring to have this essential part of it (the rig) defined with such skill and expertise."

As the participant observer had carefully set up this 'experiment' to make sure that it benefited the project, the field data from it was considered to be more that of 'action research' than of participant observation, and the high peak on the graph in Figure 2-10 was regarded as an indication of the success of the experiment rather than an effect of normal influences. However the second highest peak, in Month 30, demonstrated the same effect in a situation not manipulated by the participant observer. In this case the arrival of a qualified contract detail designer within the Services group dramatically increased the design productivity. Within one week the detail design of the scrubber was progressing well, and by the end of the following week the detail drawings for the scrubber were almost complete. For two months the project progressed rapidly again, but in Month 31 the contract detail designer was required on higher priority work, and project momentum was lost. From then on progress depended on negotiations between the project management and the Services group, and the low priority of the project without construction approval meant that the final drawings were completed in a piecemeal fashion over a long period of time.

Although the most important factors observed were to do with 'functional roles' (or expertise) in the team, an attempt to assess the influence of what Belbin calls 'team roles' (I2) was also made. A team may be adequate in a functional sense, having the right expertise and experience, yet may not have the right balance of personalities to be productive. Belbin's research on management teams suggests that, to be produc-

tive, teams need a mix of personalities covering eight basic 'team-roles', with the addition of a ninth ('specialist') role in technical situations. Using Belbin's terminology these nine roles are:

Company Worker (practical organizer);

Chairman (goal-setter and motivator);

Shaper (dynamic pusher);

Plant (creative problem-solver);

Resource Investigator (information-gatherer and negotiator);

Monitor-Evaluator (option-analyser);

Team Worker (perceptive listener);

Completer-Finisher (conscientious perfectionist);

Specialist (dedicated professional).

Almost identical team-roles have been proposed by Ryssina and Koroleva (I24) in the USSR, based on their study of team performance in engineering research institutes. They found that for teams involved in technological innovation the roles which were the key at any particular time depended on the phase of the project.

To obtain some 'team-role' data from the Gasifier Test Rig project those participants contributing the most hours to the project effort were asked and encouraged to complete the 'Self-Perception Inventory' developed by Belbin (I2, pp.153-158). Although the questionnaire was completed without adverse reaction by the contract staff it was regarded with some suspicion by Company staff, and the plans to gather such data for each phase of the project had to be abandoned. Nine questionnaires were returned, of which seven were complete. Despite the dubious response from the Company staff, including a written commentary from one who felt that the questionnaire was biased in certain directions, the results were sufficient to indicate team-role differences between participants and the influence these had on the project:

- (i) Contract staff had relatively even scores across all team-roles, which indicated more of an ability to switch from role to role than to provide strength in one or two. The average score for all three contract staff showed most strength in the role of Company Worker and least in that of Monitor-Evaluator. Scores for two of these design engineers were virtually identical for six of the roles.
- (ii) Company staff scores showed more spread than those for contract staff, but the average scores for the group were uniform, as the highs and lows cancelled

out. The group appeared to be marginally stronger in the role of Plant over other roles, and slightly weaker in the roles of Company Worker and Completer-Finisher.

- (iii) The average scores for the seven Self-Perception Inventories varied very little from role to role, as the strengths shown by the scores of the contract staff tended to complement those shown by those of the Company staff. This is somewhat academic, as two of the three contract staff were involved in the project only for short periods of time, but the project seemed to rapidly progress when these contract staff were present. It leads to speculation that they not only supported the team through functional roles, but also through an improvement in the overall balance of team-roles.
- (iv) All three contract staff were professionally involved in design yet their scores for the role of Plant (creative problem-solver) were lower than for most other roles. As the concept for the rig was considered satisfactory it suggests that for this project the role of the creative problem-solver was less important than other roles.
- (v) Credibility of the participant observer as a design engineer did not extend to that needed for obtaining social psychology data.

Design Techniques

A more systematic design approach was used for this project than had been used before by the team, and it included the use of procedures recommended by Pahl and Beitz (B48). These were important influencing factors as they provided an overall structure for the work and a selection of techniques to use in each phase. The techniques used were detailed in Chapter 2 and the effect of their use is illustrated by one or two examples here. When the project started the management staff were enthusiastic, but later this enthusiasm declined as was shown in Figure 2-41. However, with others in the project team the opposite happened; enthusiasm increased with time. The evidence is that this came from an increasing appreciation of what the systematic design approach, and the techniques, had to offer. A sign of this was on 22 December 1982, when the design specification was about to be circulated for review. One team member who had been sceptical of the whole design approach up to that point asked: "... why don't I (contract design engineer) just get on and design the rig; why the big act with paperwork? I showed him that the specification puts it all down on paper and no-one can then come back later and say that this or that was not discussed. He suddenly saw what this meant and regarded the whole thing in a new light - said he would look at it much more carefully now." [Notes]

Of all the techniques used, the one which had the most influence was the procedure for preparing a design specification. By the end of the detail design phase it had been used for three other projects (not within the same group), had been adopted personally by the contract detail designer and had prompted a manager to say that everyone was going around talking about 'Demands and Wishes'! The technique of brainstorming had been tried unsuccessfully before by the same group, but the more carefully organized brainstorm during the Gasifier Test Rig project produced over 400 ideas in 40 minutes and was felt to be well worthwhile. With regard to discursive techniques for concept selection and evaluation as recommended by Pahl and Beitz, the following interchange was tape-recorded on 18 April 1983:

- SL_A: "After a somewhat tortuous process I feel that we have produced a concept which in many respects is similar to the way I would have done it if I had been sitting down and having to draw it out from square one. I think this illustrates the fallibility of the technique at generating ideas when you are up against certain really insuperable technological difficulties."
- CDE (Participant Observer): "The thing is, has it helped us clarify the ideas behind the concept?"
- SL_A: "Well I think the great thing about it is that one feels that there isn't really a better way, and that's a great comfort to anyone who is doing design. You feel that you've covered all the angles and that, within the limits of one's own abilities you've not let anything slip by. There possibly were some different solutions which have been rejected simply because we feel that those on their own would mean a research programme to solve or which would have added significantly to the cost of pressure vessel construction...I feel with the financial and time barriers against us we have come up with the most appropriate design."

Three other influencing factors observed were the 'working techniques', 'communicating techniques' and 'motivating techniques' which were detailed in Chapter 2 (Figures 2-24 to 2-30). Some observed effects were:

- (i) Questioning people to gain more information was continually used, accounting for 7% of the recorded hours.
- (ii) Personal views had a large influence on the project proposal but almost none during task clarification.
- (iii) Negotiations between people accounted for 8% of the project effort and was a continual influence.
- (iv) As 14% of the work effort was spent in reporting and reviewing progress, the way this was done certainly influenced the project.

- (v) Occasionally the personal involvement of a particular participant helped to helped to overcome difficulties which otherwise would have caused serious delays to the project.
- (vi) By a conscious effort to maintain enthusiasm within the design team the effect of the low morale of several team members was overcome and, even though management interest in the project slowly fell off with time, the enthusiasm of the design team was gradually raised.
- (vii) Humour was rarely a feature of the project during the first phases, but during detail design it helped to defuse some potentially tense situations.

Within the Company the use of computers was commonplace but no computer-aided design facilities were available at the time and, as the project was a 'one-off', there were only a few design tasks which could have been done more quickly by using a computer. One was the design of the pressure vessel to BS 5500 or ASME VIII, Division 1 (pressure vessel code), and the participant observer attended the Whessoe training course to investigate this possibility. However, the design of vessels having flat 'heads' and Grayloc or O-ring closures was not within the scope of existing software (requires use of Appendix-Y in ASME VIII), and in the end all calculations were done by hand. (See Appendix A-3, Report GTR-5). Had some appropriate computer assistance been available for the reactor vessel design, it would have considerably reduced the time required for this part of the work, and the effect would have shown as a smaller 'hump' for the Detail Design phase in Figure 2-10. The use of computers, with the ease of working in different systems of units, would also have alleviated the problem over units mentioned below. As more work effort went into detail design than in any other phase, it was the Detail Design phase where the best return could have come from the use of computer aids, if they had been available.

With regard to the use of standards and codes, a time-consuming debate arose as to whether the Gasifier Test Rig should be designed in metric or imperial units. BS 5500 is in metric, and was the preferred pressure vessel 'code' but for the design of the flat-faced flanges BS 5500 refers the designer to ASME VIII, Div.1, Appendix-Y which is in imperial units. Standard metric bolting was not available in the sizes required for the vessel, and although the Company's policy is generally to use metric it appeared that as far as valves and fittings were concerned imperial sizes were preferred. Team members used whichever system they personally chose, and for the Gasifier Test Rig no firm decision was ever made. The result was that the final drawings were in a mixture of units! This problem of units was by no means simple. For example to reduce the danger of mixing non-compatible metric and imperial-sized standard components the tendency is for only imperial-sized items to be stocked in the stores, despite the change to metric elsewhere in the Company.

Design Team Output

Two factors regarding work output influenced the course of the project. One was team productivity, which varied considerably depending on factors previously discussed, and the other was the quality of the work, which depended largely on the expertise and experience of the people. In a sense team output was seen as the resultant of all influencing factors, and it leads to the assessment of effectiveness, efficiency and success.

The observed influences at the project level are summarized in Figure 3-5, with an assessment of their impact and a list of literature sources.

3.2.6 Personal Level

Influences at the project level are dependent on those at a personal level and although the capability and personality of each individual was not the concern of this study, factors which influenced the project were recorded. The tentative influence categories and contributing factors identified are shown in Figure 3-6, together with relevant literature sources.

3.3 Project Assessment

3.3.1 Effectiveness

In Chapter 1 a review of the literature suggested that effectiveness is concerned with the productivity and quality of output from an activity, and that it is dependent on viewpoint. For the Gasifier Test Rig project an attempt was made to assess effectiveness of the design effort in terms of the phases of the design process as used in Chapter 2, and the five levels of resolution as used in Chapter 3. At the Macroeconomic Level the impact of the project was insignificant, and no evaluation was possible. At the Microeconomic Level, which for this project was the same as the Corporate Level, the field data indicated that although construction of the test rig did not go ahead the design process was considered effective for all phases except Detail Design. The viewpoint at this level was a long-term one, in which the project timescale was small, and whether or not the test rig was ever built was of little consequence. What was seen as important was that new ideas had been developed, and the approach used for the engineering design process had been better than that used before.

At the Project Level, where the concern was with the test rig itself, a more objective assessment of effectiveness was attempted with reference to the Ideal Phase Diagram shown in Figure 2-11. In addition to the two assumptions made in Chapter 2, a third one was added as follows:

- (i) Project cost directly proportional to project effort in hours.
- (ii) All hours contributed equally to the project effort.
- (iii) Design effort shown within the ideal envelope for a phase contributed directly to the necessary effort for that phase.

These assumptions were considered reasonable approximations according to the data and, based on them, effectiveness as 'doing the right things' could be regarded as: 'completing design work within the envelope of the Ideal Phase Diagram'. A measure of effectiveness for each project phase was then the proportion of design effort completed within the ideal curve for that phase. Overall effectiveness was considered to be the proportion of overall design effort completed within the envelope of the Ideal Phase Diagram, and was measured as 70%. Assessments of effectiveness by phase, using graphical area comparisons, were as follows:

- (i) The project proposal effort was completed within the ideal envelope and was assessed as 100% effective.
- (ii) Task clarification effort was almost wholly completed within the ideal envelope and was assessed as 90% effective.
- (iii) Conceptual design was considered adequate, but it was not completed within the ideal envelope due to factors such as a loss of effort through vacations. This reduced the effectiveness of the effort: the cost justification for rig construction was late and lacked strength. Conceptual design effort was assessed as 75% effective.
- (iv) The low level of effort during embodiment design, mainly due to the effect of external influences stalling the decision on construction funding, resulted in poor effectiveness during the phase. Even the massive effort on the control system design, completed outside the ideal envelope, did not compensate for the previous loss in effort. Embodiment design effort was assessed as 50% effective.
- (v) Detail design started near a holiday period when motivation was low and the project team lacked a qualified detail designer. Much of the work effort was outside the ideal envelope, and momentum was lost. Detail design effort was assessed as 70% effective.

At the Personal Level there seemed to be general agreement that the first three phases of the engineering design process were effectively carried out, but for embodiment and detail design it depended on the the role of the assessor. For example the participant observer saw the the design of the control system as an extremely effective 'projectwithin-a-project', even though it came too late to ensure that the overall embodiment design effort was effective.

3.3.2 Efficiency

From the literature review in Chapter 1 it was suggested that a system is efficient "when it does well what it does" (A41), and that assessment of efficiency depends on the viewpoint taken. To attempt an assessment for the engineering design process in the case of the Gasifier Test Rig the project was again considered in terms of its phases and the five levels of resolution. At the Macroeconomic Level the assessment of efficiency depended on comparison with other similar projects, and no suitable data was available for this. At the combined Microeconomic and Corporate Level there was enough data available from previous projects to indicate that the proposal and task clarification design effort on this project could be considered comparatively efficient. For the other three phases there was insufficient data for an assessment, although the design effort on the control system was assessed as highly efficient from all viewpoints.

At the Project Level reference was again made to the Ideal Phase Diagram in Figure 2-11, to attempt a more objective assessment. Based on the same three assumptions as used for assessing effectiveness, a tentative measure of efficiency as 'doing things right' was considered to be: 'completing the design effort for each phase to match the time-span and overlap in the Ideal Phase Diagram'. This offered a measure of efficiency not in terms of how quickly the whole project was completed (which was irrelevant) but to what extent the work in each phase was completed within the agreed schedule for that phase. It took account of the fact that conditions laid down at the outset made the work schedule for each phase contingent on the outcome of the preceding phase. Thus a tentative measure of 'efficiency' for each phase of the engineering design process was seen as the ratio of 'ideal time-span' to 'actual time-span' for each phase. From this an average efficiency of 75% was assessed for the overall design process, and the results for each phase were:

- (i) Proposal effort 95% efficient.
- (ii) Task clarification effort 95% efficient.
- (iii) Conceptual design effort 70% efficient.
- (iv) Embodiment design effort 65% efficient.
- (v) Detail design effort 65% efficient.

It is emphasized that this was just a preliminary attempt at trying to measure 'efficiency' of the engineering design process from this project data, and further research is needed on this.

At the Personal Level the assessment of efficiency varied widely depending on previous project experience. For example the participant observer saw the overall work effort as inefficient by comparison with similar projects carried out in other circumstances, but as comparatively efficient within this particular context.

3.3.3. Success

In Chapter 1 it was concluded that success is seen to be dependent on time and on viewpoint, and that perhaps in regard to the engineering design process it could be assessed at the end of each phase. Based on evidence from the field data the following summaries indicate what appeared to be the relative success for each project phase, as seen from the combined Microeconomic and Corporate Level, the Project Level and the Personal Level. No general assessment could be made at the Macroeconomic Level.

Corporate Level

It was mentioned above that the viewpoint at this level was a long-term one in which the Gasifier Test Rig itself was a very minor part. Even at the beginning, the project objectives included wider aspects than just the engineering design of a test rig (see Appendix A.2), and it was generally in regard to these that the success of the project was evaluated from the corporate viewpoint. The Proposal, Task Clarification and Conceptual Design Phases were considered successful in a technical sense for this particular rig, but also because they introduced new ideas regarding the approach to the design of any such rig. In particular the technique for producing the design specification was later used for other projects. The Embodiment and Detail Design Phases had little impact at the corporate level, and only the rapid completion of the control system design resulted in evidence to indicate that the project was considered successful at this stage. A series of discussions were held regarding the lack of resources available to the project for detail design, and later there was evidence that major improvements had been made for the benefit of future projects.

Project Level

At the project level the first three phases were considered successful when compared with previous projects carried out by the same project team. The design specification was considered better, concepts were more fully explored and the final concept allowed for various reactor configurations to be tried without modifying the vessel or its controls (i.e. low 'concept vulnerability'). Communication within the project team was better and the design work was better recorded. This also applied to the embodiment and detail design effort but, from the project viewpoint, the failure to secure the funding for construction was in fact a failure of the project. Even the technical success of the control system design could not be evaluated as 'successful' from the project viewpoint while funding for construction was not forthcoming. As mentioned before, this stemmed more from the effect of external influences than from weaknesses in the design effort, and it illustrates a situation often encountered by engineering design teams in industry.

Personal Level

Each person involved with the project had a different interest in it, and different expectations from such involvement. To the Directors it was a matter of research policy; to the Managers a project which could enhance or reduce future prospects depending on many factors; to Research Staff it offered improved materials test equipment; to the Services Staff it was another project to be accommodated somehow; to the Contract Staff it was a design project to be completed as well as possible; and to the Specialist Suppliers it was a chance to sell more of their products. To others it was only of passing interest.

The 'success' of the project from each individual viewpoint ranged from complete failure (Suppliers who provided design help at their own expense but received no orders) to complete success (Contract Controls Engineer who received payment and congratulations for a job well done). The only generalized assessment which could be made at this level is that up until it became known that construction of the rig would be deferred there was a feeling that the project had been successful, and thereafter the opposite feeling prevailed. The evidence for this could be seen in the change of 'mood' of team members as they gradually became aware of the situation.

3.4 Conclusions

- (i) A qualitative analysis of the field data for the project provided contextual evidence to support the quantitative analysis of the engineering design process.
- (ii) The Context Model described in Chapter 2 was used to define five levels of resolution for structuring the qualitative analysis.
- (iii) A list of 103 influencing factors likely to affect the engineering design process was generated from relevant literature, grouped by resolution level into 20 categories of influence.

- (iv) Evidence from the field data was used to determine the effect of each influencing factor on the engineering design process for this project, and the overall results are summarized in Figure 3-7.
- (v) The greatest effect on the project was observed to have come from: External Influences; Availability of Resources; Corporate Systems; Management Style; the Design Team; and Design Techniques used.
- (vi) The average effectiveness of the engineering design process during the project was assessed as 70% based on design work completed within the envelope of the Ideal Phase Diagram for the project. Three project-specific assumptions were used.
- (vii) The average efficiency of the engineering design process during the project was tentatively assessed as 75%, based on the ratio of the sum of ideal phase time-spans to the sum of actual phase time-spans. Three project-specific assumptions were required for this.
- (viii) The Proposal, Task Clarification and Conceptual Design phases of the engineering design process were seen as successful from all viewpoints. The Embodiment and Detail Design phases were seen as successful from the Corporate viewpoint, less successful from the Project viewpoint, and Personal viewpoints varied widely.

LEVEL OF RESOLUTION

ENGINEERING DESIGN CONTEXT

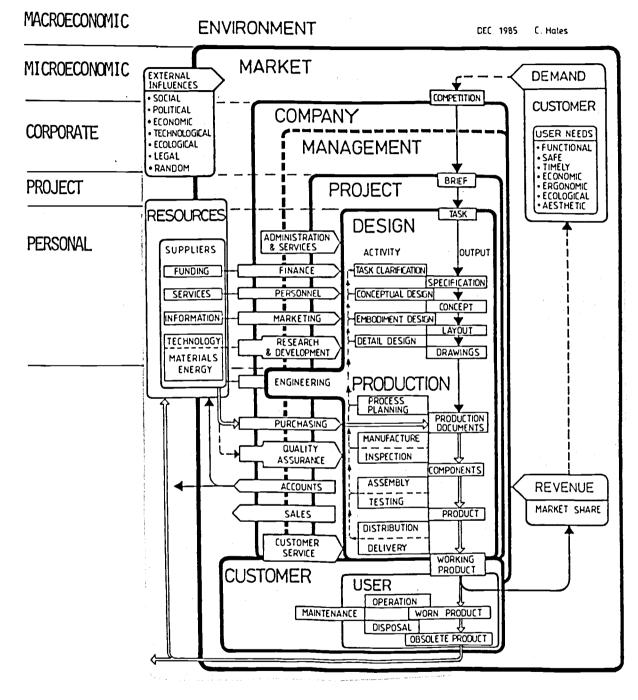


Figure 3-1 Context Model Showing Levels of Resolution

99

INFLUENCE CATEGORY	CONTRIBUTING FACTORS	OBSERVED IMPACT High Med Low	REFERENCES
External _ Influences	[Social	X	[A34,38,44;B36;D10; F2,8;G3;H47;I28]
	Political	X	[A38,44;B36;D10;F8,9 H6,16,47]
	Economic	x	[A34,44;B36;D10;F7,8 9;G3;H43,47]
	Technological	x	[A34,44;B36;D10;G3; H6,34; I6,7]
	Ecological	x	[A44;F6;I28]
	Legal	X	[A38,44;C13;F3,4,5,9 10;I27]
	Random	x	[A34;B36;C34;H16;I6, 27]

MACROECONOMIC LEVEL

FIGURE 3-2 MACROECONOMIC LEVEL INFLUENCES

MICROECONOMIC LEVEL

INFLUENCE	CONTRIBUTING	OBSERVED IMPACT	REFERENCES
CATEGORY	FACTORS	High Med Low	
Market	Demand - Competition Financial Risk	X X X X	A14,33,34,38,44;D10; G4,5,6,9,11;H16,19, 43,46,47;I6,7,9,10.
Resource Availability	Services (Human) Finance (Capital) Information Technology Materials Energy	X X X X X X X X X	A33,38,44;B51;C17, D8,10;G4,7,9,10;F9; H6,21;I6,7,9,11;I15, I28.
Customer	Clarity of Need	X	[G2,3;H32;I9]
	- Urgency of Need	X	[A33;H44;I9]
	Expectations	X	[A14,38;B40,51;C13;
	Involvement	X	D19;H44;G1,8,I10,21]

FIGURE 3-3 MICROECONOMIC LEVEL INFLUENCES

CORPORATE LEVEL

INFLUENCE CATEGORYCONTRIBUTING FACTORSOBSERVED IMPACT High Med LowREFERENCESInternational SpanXD6,10;F8;H8,9,14,16 17,19,20,30,32,35, 39,41;47.National SpanXD6,10;F8;H8,9,14,16 17,19,20,30,32,35, 39,41;47.CorporateInternational SpanXStructureComplexityXFlexibilityXContralizationXProject AutonomyXIntegrationXIntegration UseXIntegration UseX
National Span X 17,19,20,30,32,35, 39,41;47. Corporate Local Size X Structure Complexity X Mational Span X Local Size X Complexity X Flexibility X Centralization X Project Autonomy X Integration X Information Use X [B57;C16;D10;H21;16]
Corporate Overall Size X [39,41;47. Structure Local Size X [A18,44;C13;D2,3,4,4] Structure Complexity X [A18,44;C13;D2,3,4,4] Flexibility X [10,16,F8,9;H1,6,8,9] Centralization X [26,23,30,35,36,37, 40,41,42,46;I9,14] Project Autonomy X [A18;H14,35,38;I28] Information Use X [B57;C16;D10;H21;I6]
Corporate Overall Size X [39,41;47. Structure Local Size X [A18,44;C13;D2,3,4,4] Structure Complexity X [A18,44;C13;D2,3,4,4] Flexibility X [10,16,F8,9;H1,6,8,9] Centralization X [26,23,30,35,36,37, 40,41,42,46;I9,14] Project Autonomy X [A18;H14,35,38;I28] Information Use X [B57;C16;D10;H21;I6]
Structure Complexity X A18,44;C13;D2,3,4,6 Flexibility X 10,16,F8,9;H1,6,8,9 Centralization X 26,23,30,35,36,37, Project Autonomy X 40,41,42,46;I9,14. Integration X [A18;H14,35,38;I28] Information Use X [B57;C16;D10;H21;I6]
Flexibility X 10,16,F8,9;H1,6,8,9 Centralization X 26,23,30,35,36,37, Project Autonomy X 40,41,42,46;I9,14. Integration X [A18;H14,35,38;I28] Information Use X [B57;C16;D10;H21;I6]
Centralization X 26,23,30,35,36,37, Project Autonomy X 40,41,42,46;19,14. Integration X [A18;H14,35,38;128] Information Use X [B57;C16;D10;H21;16]
Project Autonomy X 40,41,42,46;19,14. Integration X [A18;H14,35,38;128] Information Use X [B57;C16;D10;H21;16]
Integration X [A18;H14,35,38;I28] Information Use X [B57;C16;D10;H21;I6
Information Use X [B57;C16;D10;H21;I6
Information Use X [B57;C16;D10;H21;I6
Corporate Technical Complexity X [A49;D10;H14,H39]
Systems Physical Environment X [C13;D10;F9;H1,18,4
Social Environment X [C13;D10;F9;H7,11,1
Pay and Benefits X [D10;F8,9;H1,14,31]
Clarity of Objectives X [A19,44;D10;H6,14,3
Corporate Risk-Taking X [D10;H6,16,25,32,42
Strategy Innovation X [D10;F9;H4,6,32,35]
Involvement X [A19;C23,33;H6,35;I
Shared Commitment X A19,44;C7,34;D10,1 Values Enthusiasm X G7;H8,9,13,15,23,3
Values Enthusiasm X G7;H8,9,13,15,23,3 34,35,47;I1,22,28. 34,35,47;I1,22,28.
Autocratic Element X [H2,14,22,25,33,37]
Management Benevolent Element X [H22,24,37]
Style Consultative Element X [H7,22,24,33,35,37]
Participative Element X [A18,19;D10;F8;H2,8 14,23,26,37;I1,28]
- -
Planning X [A18,38;H4,6,23,34] Organizing X [D10;H4,33,42;I5,22]
Directing X [D10;H4,33,42;15,22]
Management Coordinating X [D10;F8;H4,25,42;I5]
Skills Controlling X [A38;D10;H4,8,32,42]
Communicating X [A18;C13,30;D10;H4,
Representing (Champion) X [A19,34;D10;H4,6,35
Resource Utilization X [A33,38;C17;D10;H6,
12,14,23,25;15]
Number X [A18,19,44;D10;H6,3
Awareness X [A19;D10;H4,9,30,32
Management Judgement (Decisions) X [D10;H27,28,36;I1,6
Staff Motivation X [A19,34;D10;H1,14,4
Morale X [A19;D10;H1,14,19,3 Confidence X [A19;P10;H1,14,19,3
Confidence X [A19;H8,9,35,42]

FIGURE 3-4 CORPORATE LEVEL INFLUENCES

INFLUENCE CATEGORY	CONTRIBUTING FACTORS	0BSER High			REFERENCES
	Magnitude		 X		[C13;D18;H26,46]
_	Complexity		Х		[C13;D18;I23,25,27]
Design	Novelty	Х			[A38;C13;D18;I9,10]
Task	Production Quantity		х		[A49;C13;D18;I10.27]
	Technical Risk	X			[C13;D10;H47;I10,27]
	Delivery Time (Urgency	·)	Х		[D5;H44;I11,20,28]
	Expertise (Competence)	x			[A44;C15;I9,22,28]
	Experience	x			[A44;C15;D10;I28]
	Role-Balance	x			[D11; I2, 3, 9, 12, 24]
	Cooperation		х		[A33;B36;D19;H6,38]
Design	Commitment	х			[A19;D10;H8;I4]
Team	Motivation	x			[A34;D10;H26;I22]
	Morale		х		[A19,34;D10;H15;I22]
	Negotiating Ability		x		[A18;D10;H25;I4,28]
	Power-Base			х	[D12,13;H1,8,9;I28]
	User-Involvement	х			[A14;C7;H6,8;I21,27]
	Systematic Approach	х			[A38;B31,48,51;C33]
	Formal Procedures	X			[C24;B23,36;I16,18]
	Working		х		[A38;C13,15;B48;I26]
Design	Communicating	х			[C30;H6;I11,15,22,28]
Techniques	Motivating	x			[A19,34,44;D10;H14]
-	Computing			х	[D1,10;I28;J8]
	CAD			x	[A44;D10;I9,28;J8]
	Standards and Codes		Х		[A38,44;B48;H47;I10]
Design	Productivity	х			[D16 17,002 24, TOO)
Output	Quality of Work	x			[D16,17;H23,34;I22] [B9,D5,6,7,9;I1,22]

PROJECT LEVEL

FIGURE 3-5 PROJECT LEVEL INFLUENCES

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INFLUENCE	CONTRIBUTING	OBSERVED IMPACI	REFERENCES
CATEGORY	FACTORS	High Med Low	
Personal	_Knowledge-Base	x	[G7;H44;J1,2,3,4,6]
Knowledge	Applicability		[G7;H44;J1,2,3,4,6]
Personal	Judgement/Perception	x	[D10;G7;H3;I8;J11]
	Competence	x	[D10;H1,29;I22,28;J2]
	Communication	x	[C30;D10;H3;I8;J1]
Skills	Creativity/Imagination	n X	[D10;H42,44;I8;J8]
	Versatility	X	[A18;D10;H47;J4]
	Negotiating Power	X	[D13;H3,25,31;I4,28]
Personal Attitude	Work Standards Self-Discipline/Habits Integrity Role-Compatibility	X s X X X	[D10;I28;J10] [B52;D10;I28;J1,7] [I4,9;J10] [A18;H42,44,47;I2;J9]
Personal Motivation	Enthusiasm Involvement Tenacity/Determination Anxiety Humour	x x n x x x	[A19;C33,34;D10;H35] [A19;C23,33;D10;H10] [A34;D10;I4,8,28;J10] [A34;J5,9,11] [J2,9]
Personal	Productivity	X	[B52;D10;H34,44;J10]
Output	Quality of Work	X	[A44;D10;H11,34;J10]

PERSONAL LEVEL

FIGURE 3-6 PERSONAL LEVEL INFLUENCES

SUMMARY	OF INFLUENCES AT FIVE L	EVELS OF RESOLUTION
RESOLUTION LEVEL	INFLUENCE CATEGORY	CONTRIBUTING FACTORS
Macroeconomic -	External Influences:	Political; Economic.
	Market:	Demand; Competition
Microeconomic -	Resource Availability:	Information; People.
	Customer:	Clarity and Urgency of Need; Expectations; Involvement.
	Corporate Structure:	Project Autonomy.
	Corporate Systems:	Information Use; Environment; Pay and Benefits.
	Corporate Strategy:	Clarity of Objectives; Risk-Taking; Involvement.
Corporate -	Shared Values:	Commitment; Enthusiasm.
	Management Style:	Benevolent Element.
	Management Skills:	Communication; Utilization of Resources; Representation.
	Management Staff:	Number; Decision-Making; Confidence.
	Design Task:	Novelty; Technical Risk.
	Design Team:	Expertise; Experience; Role- Balance; User-Involvement; Commitment; Motivation.
Project ·	- Design Techniques:	Systematic Approach; Listing Requirements; Questioning; Negotiating; Reviewing and Reporting; Raising Enthusiasm.
	Design Output:	Productivity; Work Quality.
	Knowledge:	Applicability.
	Skills:	Competence; Versatility; Negotiating Power.
Personal	- Attitude:	Self-Discipline; Standards.
	Motivation:	Enthusiasm; Involvement; Tenacity.
	Output:	Productivity; Work Quality.
FIGURE 3-7	MAIN FACTORS INFLUENCING	GASIFIER TEST RIG PROJECT

CHAPTER 4

CONCLUSIONS AND APPLICATIONS

4.1 Overall Conclusions

4.1.1 Context of Engineering Design

The engineering design process is highly dependent on the context in which it takes place, and to analyse an engineering design project in industry it was found necessary to categorize the field data obtained according to hierarchical levels of context. A diagrammatic model with five levels of resolution was developed for this purpose, showing the Engineering Design Process set within the Project, within the Company, within the Market and within the External Environment. For the quantitative analysis the model helped in identifying the engineering design work effort within the total project effort, and for the qualitative analysis it provided a framework.

4.1.2 Quantitative Project Analysis

The one easily and accurately measured quantity in the engineering design process is work effort in hours. From it the related project costs may be derived, and resource utilization assessed. However, from an engineering design viewpoint the measurement of work effort in hours has no meaning without context. For this thesis a hybrid analytical approach was adopted which included the context. It was based on detailed quantitative data in terms of work hours, but complemented by qualitative data on the people, dates, type of work, location, topic, and mood. Work effort was analysed according to these qualitative data categories as well as by 'activities' and 'outputs' observed during the engineering design process. From the results it was possible to draw the following conclusions:

- (i) The hourly work effort input to an engineering design project may be categorized in terms of five overlapping phases each consisting of a particular mix of procedural steps and general activities.
- (ii) When the work effort in each phase is plotted along a time-axis, a characteristic 'phase diagram' is obtained for that particular project. This may be compared with an 'Ideal Phase Diagram' for the same project, created assuming an idealized project situation, and the differences between them measured.
- (iii) A plot of cumulative effort against time provides an approximate measure of 'percent completion' for an engineering design project, and comparison of this

against an equivalent plot derived from the project's Ideal Phase Diagram gives a measure of achievement.

- (iv) Design work not completed within the envelope of the Ideal Phase Diagram for a particular project will have to be completed at a later time, causing diversion of effort and increased costs.
- (v) Changes to the design specification outside the ideal phase curve for Task Clarification cause increases in project effort and cost which may be measured partially by comparison of the actual and ideal phase diagrams for the project.
- (vi) For the particular project studied, the procedural steps of the engineering design process as modelled by Pahl and Beitz accounted for 47% of the engineering design effort. Six other categories of general design 'activity' were added which accounted for the remaining 53%.
- (vii) The Pahl and Beitz list of 'methods and aids' accounted for 22% of the observed engineering design effort. Thirteen additional categories of design-related techniques were identified which accounted for a further 74%. Four percent remained unclassified.
- (viii) The activity which accounted for the highest proportion of the engineering design effort (22%) was found to be reviewing and reporting, and the most used design-related technique (15%) was found to be communicating by means of reviews and reports.
- (ix) Theoretical and observed outputs were compared for each phase of the engineering design process, and actual outputs were evaluated in terms of quality and quantity. Those from the Proposal, Task Clarification and Conceptual Design phases were assessed as satisfactory in both quality and quantity. Those for the Embodiment Design and Detail Design phases were satisfactory in quality but productivity was low. In general the observed outputs were found to match those in theory except for the added cost justification documentation and the control system design in Embodiment Design.
- (x) Over 50% of the observed project effort was carried out by people working alone or in pairs on specified tasks, 30% was spent in meetings involving 2, 3 or 4 people, and 9% was evenly divided between telephone calls and the writing or reading of letters.
- (xi) Over 50% of the observed project effort took place in the personal office of one or other member of the project team, the remainder taking place in a variety

of locations including conference rooms, cafeterias, passageways, at home and while travelling. Only 17% took place in the 'design office'.

(xii) A preliminary way of assessing the variations in 'mood' of project team members was developed and the results plotted for the project reflected the subjective assessments given by the team members.

4.1.3 Qualitative Project Analysis

The qualitative data obtained from the field study was used to provide an explanation for why things happened the way they did, and this was done by considering the various influences acting on the project at five different 'levels of resolution' according to the Context Model. From the relevant literature a tentative listing of 103 possible Contributing Factors was generated, and this was divided into 20 'Influence Categories'. Evidence from the field data was used to make judgements as to which of the factors had an effect on the project and to what extent. Those observed to have affected the project most strongly were as follows:

Macroeconomic Level -Political and Economic External Influences;

Microeconomic Level	-Demand, Competition, Availability of Information and People, Clarity and Urgency of Need, Expectations;
Corporate Level	-Risk-Taking and Clarity of Objectives;
Project Level	-Expertise, Experience, Commitment, Motivation, System- atic Design Approach, Team Productivity and Work Quality;
Personal Level	-Competence, Enthusiasm, Involvement, Tenacity, Self- Discipline, Personal Productivity and Work Quality.

An assessment of the effectiveness and efficiency of the engineering design process, and the success of the project, was attempted. Assuming that project costs were proportional to work hours, all hours were of equal contribution and that all hours were necessary, conclusions were:

- (i) The average effectiveness of the engineering design process was assessed as 70% based on actual design work completed within the envelope of the Ideal Phase Diagram for the project.
- (ii) The average efficiency of the engineering design process was tentatively assessed as 75%, based on the ratio of the sum of the ideal phase time-spans to the sum of the actual phase time-spans.

(iii) The overall degree of success was regarded as how well expectations of customer satisfaction, design output and project costs were met during each project phase. The Proposal, Task Clarification and Conceptual Design phases were considered successful from all view-points. While the Embodiment Design and Detail Design phases were considered successful from the combined Microeconomic and Corporate viewpoint, they were not from the Project viewpoint. Personal Level assessments ranged from successful for some participants to unsuccessful for others, depending on involvement and expectations.

4.1.4 Field Research Methods

Participant observation, the main field research method used during this study, enabled suitable data to be gathered for analysing the engineering design process. However there were a number of drawbacks to the method, which was based on the use of notebooks and audio tape-recordings.

- (i) The method was found to be excessively time-consuming. For every hour of recorded design effort put in by the participant observer, about another hour (not recorded) went into writing up the field notes after the day's work. The stretched schedule planned for the project was an advantage from a design research point of view. Had the timescale had been shorter, another participant observer would have been needed to keep up with the data flow.
- (ii) The method was found to be inefficient in that a lot of background and repetitive information was collected. This helped in verifying the data by 'triangulation' (cross-checking using data from several sources), but there was more redundancy than necessary.
- (iii) The credibility of the participant observer as a design engineer did not extend sufficiently for the collection of team-role data. It would have been a great advantage to have had a second observer with the necessary credibility for collecting such data.
- (iv) The participant observer had two separate types of work to perform in parallel: engineering design and 'social science' research. The two require different types of thinking and it was was necessary to alternate between them on a 'weekabout' basis. This was found to be arduous, with conflicting demands on time.
- (v) As the test rig was not built within the research timescale there was no performance data available to help in analysing the outputs from each phase of the design process. It was concluded that while participant observation of a project as it proceeds is probably the only way of obtaining data for analysing

the design *activities*, a better way of obtaining data for analysing the design *outputs* might be to take the performance data from an operational system and work backwards through the project, considering the output of each phase in terms of the performance of the system in service.

In general the field notes, together with the usual type of design work output, provided adequate data for this study. At the time it had seemed important to also tape-record as much as possible, but the recordings were found necessary only for occasional reference, in particular where it had not been possible to keep up with the data flow by taking notes.

The overall conclusion with regard to the field research method was that the approach was appropriate for this study and that the effects of bias and distortion were lessened by the collection of redundant data over the 3-year timescale. However a more efficient way of recording and handling the field data would have greatly reduced the research effort required.

4.1.5 Data Reduction and Analysis

The task of reducing and analysing 1180 pages of field data was not easy. A manual method of colour-coding information and transferring it to data-sheets was devised, and this reduced data was fed into a computer database for sorting and analysing. The complete project is summarized on 48 pages of coded interchange records (Appendix A.1), and the 2368 hours of work from the 37 people can be detailed in a single table (Figure 2-14). The main database could be stored on two floppy discs. By using the computer to create summary databases, graphs and tables could be produced based on many more combinations of data than have been considered in this thesis. Overall conclusions regarding data reduction and analysis were as follows:

- (i) A time-consuming but effective method for reducing the field data by a factor of 24 was developed, using interchange data sheets.
- (ii) Commercially available software packages were suitable for handling the data, analysing the data and producing final tables and graphs.
- (iii) The Interchange Data Sheet system developed could be used to record field data from a project directly, thus eliminating the need for detailed field notes and all subsequent compiling, coding, and data reduction. If this had been possible for the current project, the research effort would have been reduced by one year.
- (iv) Using the Interchange Data Sheet system, it would be possible for field data to be fed directly into a computer database and analysed as it was generated. This could lead to a dynamic modelling of the engineering design process in the future.

(v) The data for this project is stored on standard floppy discs, using standard hardware and software. It could therefore be used by other design researchers (subject to data protection agreements) wishing to do comparative studies or to analyse the data further.

4.2 Applications of Findings

4.2.1 Management of Engineering Design

The conclusions from this study suggest that the effectiveness and the efficiency of the engineering design process are strongly influenced by the way the process is managed. A preliminary approach to the monitoring of design projects by phase has been developed and this, in conjunction with the tentative list of influencing factors identified, offers a more structured way of thinking about engineering design situations. With some development it is possible that a simple quantitative/qualitative analysis approach could help in the control of engineering design projects through 'compensatory tracking' of key influences.

Over 80% of the design effort on this project was done outside the 'design office', over 50% was done by people working alone or in pairs, and 9% involved letters or telephone calls. This suggests that in managing the engineering design process such things as individual working space and ready access to communication facilities are important factors.

4.2.2 Engineering Design Practice

As modelled in theory the engineering design process generally consists of a series of phases within which there are iterative steps. In practice the situation is more complicated than this, and it was found that if six general categories of 'activity' were added to the commonly used 'steps' within each phase, a more realistic model of what actually happened was produced. As over half the design effort for this project fell into the general categories of activity, rather than into the steps, the indication is that in order to improve the effectiveness of the engineering design process more emphasis needs to be put on how such activities as collecting information, cost estimating and reporting are carried out. Similarly, use of the 'methods and aids' often associated with the engineering design process accounted for less than one-quarter of the work effort on this project, while almost three-quarters was accounted for in the use of other working', 'communicating' or 'motivating' techniques. This suggests that the development of techniques for such things as questioning, negotiating, reviewing, reporting and motivating may be of importance.

4.2.3 Engineering Design Research

The possibility of using the techniques developed for collecting, coding, reducing and analysing field data in future studies has been mentioned. By building up compatible databases for different projects, higher level comparative studies and even higher level surveys could be provided with more reliable and uniform data than have been available in the past. It is likely that some of the additional engineering design 'activities' and 'techniques' observed during this project would be common to other design projects, and the aim has been to present the results in such a way that they may be compared with those from different projects in the future.

The Context Model, the Ideal Phase Diagram concept and the preliminary Checklist of Influences were developed also to try and help classify or 'profile' the project. Although much more research is needed in order to develop a simple way of doing this, the results so far indicate that it may be possible to classify engineering design projects in terms of their context, the relative work effort needed for each phase, the extent of phase overlap and the key influences acting at any particular time.

CHAPTER 5

RECOMMENDATIONS FOR FUTURE RESEARCH

5.1 Engineering Design Process

From the quantitative analysis of this project a number of possibilities and areas needing further research were identified:

- (i) Development of the 'ideal phase diagram' approach for engineering design projects, possibly using statistical methods.
- (ii) The monitoring of engineering design projects based on comparisons between ideal cumulative effort and actual cumulative effort.
- (iii) Assessment of the effect that design work completed outside the 'ideal curve' for one phase has on other phases.
- (iv) Investigation into the consequences of changing the design specification outside the 'ideal curve' for Task Clarification.
- (v) Comparative studies of the 'activities' of the engineering design process for various types of project.
- (vi) Comparative studies of the design-related 'techniques' used during the design process for various types of project.
- (vii) Analysis of working products or equipment in terms of the output quality and quantity for each phase of the design process.
- (viii) Analysis of relationships between design-related techniques used and the final design of a product or system.
- (ix) Study of communications during the engineering design process.
- (x) Investigation into relationships such as between techniques used and interchange type, and between design activities and location.
- (xi) Development of techniques for assessing and monitoring the 'mood' of design project teams.

The results of the qualitative analysis also indicated a number of areas needing further investigation:

 (i) Development of a 'checklist of influences' by detailed studies of particular 'categories of influence' and 'contributing factors' at each of the five levels of resolution shown by the Context Model.

- (ii) Identification of key influences governing particular engineering design situations, and assessment of their impact on the project.
- (iii) Profiling or characterizing engineering design situations by key influences according to a 'checklist of influences'.
- (iv) Analysis of influences as 'constants' and 'variables', and also as project 'facilitators' (promoting the design effort) or 'barriers' (inhibiting the design effort).

5.2 Compensatory Tracking

It was concluded that a combined quantitative/qualitative analysis might be useful in the management of engineering design projects. The only way to prove this is by trying such approaches on real projects in industry. To collect the necessary data, 'action research' could be used instead of participant observation, with the researcher planning a design project and actively controlling it according to the results of ongoing data analysis. It is possible that from such research, techniques for the 'compensatory tracking' [Kempner (H19, p.409)] of design projects could be improved. Of particular interest would be the design team composition and how it may be adjusted to meet varying needs during each phase of a project.

5.3 Project Assessment

Although assessments of 'effectiveness', 'efficiency' and 'success' were attempted for the Gasifier Test Rig project the approaches used were based on assumptions specific to the project, and the results were tentative. A great deal more research is needed to help define the terms more precisely and to develop better assessment techniques for each one.

5.4 Project Classification

No accepted taxonomy exists for classifying design projects, which makes coordination of research effort and comparison of findings difficult. As concluded from this study, classification based on context, project phase characteristics and influences might prove feasible, but further research is needed. At the start of a design project many of the characteristics are already known, and perhaps a preliminary 'project profile' could be compiled [Mateev et al. (D17)], with blank spaces left for unknowns. The profile at this stage would consist mostly of those factors regarded as constant. This could be used as a general project classification, stored in a computer database. Assuming that many different projects had been classified in this way it would then be possible to search for projects having a particular combination of general characteristics, say: medium market demand; large company size; low project magnitude; high technical risk. More useful to the design researcher would be a classification which included a general assessment of the 'variable' characteristics as well. No data for this would exist until the project was in progress, but then full profiles could be compiled, perhaps at the end of each phase of the design process, allowing a more detailed classification at the end.

5.5 Literature Classification

Much of the development effort for the Context Model and the checklist of influences was spent in discovering and obtaining the relevant literature. The terminology problems referred to in Section 1.6 have tended to result in a poor choice of keywords for bibliographic databases in engineering design. Computer literature searches are currently of less help than they might be, and the manual scanning of literature in various disciplines is extremely time-consuming. A classification system more suited to the interdisciplinary nature of design is needed, as discussed by Hubka (B30). Archer (B5) suggested that 'Design' should be considered as a discipline in its own right, divided into sub-disciplines. Such an approach helps to classify types of design projects. From the project viewpoint it might be more appropriate to develop a classification system based on 'levels of resolution' and 'phases of the design process'. If a graphical mapping technique was feasible the research interest could be defined in these terms and the literature computer-searched for sources within the selected boundary.

5.6 Terminology for Design

As discussed in Section 1.6, engineering design terminology was found to be a difficult problem. Further research is needed to help develop a more universal terminology for design, compatible with the terminology in other disciplines.

5.7 Research Methods

Participant observation of projects in industry is adequate for obtaining the wide variety of data needed to gain a better general understanding of the engineering design process, but more efficient data collection methods are needed for dealing with different types of project and more than one project at a time. Techniques for investigating specific aspects, such as design 'quality' also need development through further research.

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- A. BACKGROUND
- B. THEORY & PRACTICE

KEY:

- ADOU
- V Volume N - Number

- C. FIELD RESEARCH
- D. PROJECT ANALYSIS
- E. GLOSSARIES

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APPENDICES

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- A.2 CASE HISTORY
- A.3 DESIGN REPORTS

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- B.1 OVERALL APPROACH
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- B.3 PARTICIPANT OBSERVER
- B.4 DATA COLLECTION
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APPENDIX C:

- DATA PROCESSING
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- C.2 INTERCHANGE DATA SHEETS
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APPENDIX D: DESIG

DESIGN PROCESS MODELS

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- D.5 EHRLENSPIEL
- D.6 BESSANT

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APPENDIX A.1

GASIFIER TEST RIG PROJECT - CASE DATA

A chronological listing of the database records for the complete project (excluding original 'mood' and 'remarks' columns) is provided in this section of the appendices. From this the database may be recompiled on any computer system and further analysis or comparison with data from other projects could be carried out. The key to the various column headings and codes used is given below, and further details on use of the database is given in Appendix C.

COLUMN DESCRIPTION & CODES

- INT_NO Interchange Number [See Appendix C].
- PERSON Participant Code [See Fig. C-1 (p.C6) and Fig. 2-14 (p.63)].

DATE - Date of Interchange by Month/Day/Year.

TYPE - Interchange Type + Number of Participants + In or Out for L & T.
 [M = Meeting W = Work L = Letter T = Telephone I/O = In/Out]
 [See p.48 for details].

L	- Location [See p.49	for details].		
	[O = Own Office	A = Another's Office	N - Noisy Office]	
	[D = Design Office	L = Laboratory	R = Conference Room	
	[C = Cafeteria	B - Library	P - Passageway/Lobby]	
	[E - Outside		H - Home/Hospital]	

TOPIC - Topic of meeting, work, letter or telephone call.

- HRS Hours, rounded to one decimal place [0.1 hr].
- f/H Cost/hour for participant including overheads [f Sterling].
- P Phase of engineering design process [See pp.34 & 35].
 [P Proposal T Task Clarification C Conceptual Design]
 [E Embodiment Design D Detail Design]
- ACT Activity or 'step' within a phase of the design process. [For code list see Fig. 2-23 (p.69)].
- TQ Design-related technique being used during interchange. [For code list see p.36 and Figs. 2-20 & 2-21 (p.65)].
- M 'Mood' of participant project from project viewpoint [See p.51]. [+ = +ve 0 = neutral - = -ve]

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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₽		CDE	11/10/82		MARCH 82 REPORT	1.0		TCP		0 +		SL_A	1
		AMA	11/10/82		UPDATE	0.1		TXR	YR		104		1
ω		CDĒ	11/10/82		UPDATE	0.1		TXR	YR			SL_A	1
I.	78	CDE	11/11/82		WRITING WEEKLY REPORTS	4.0		TXR	YR			ASL_A	1
•	79	CDE	11/12/82	M 2 A	PROJECT PROCRESS	1 0		TXR	YR			R1_A R2 A	1
	79	RM_U	11/12/82	M 2 O	PROJECT PROGRESS CONSTRUCTING GTR CONSTRUCTING GTR CDE TO VISIT NNC CDE TO VISIT NNC PREPARING FOR DAY GENERAL INFORMATION	1.0		TXR	YQ			S1_P	1
		CDE	11/12/82	T 2 00	CONSTRUCTING GTR	0.1		TXI	-	+		DE S	1
		SE_FL	11/12/82	T 2 IO	CONSTRUCTING GTR	0.1		TXI		+		CDE	i
		CDE	11/15/82	T 2 00	CDE TO VISIT NNC	0.2		TXI	0	+		SL_A	i
		SE_FL	11/15/82	T 2 IO	CDE TO VISIT NNC	0.2	15	TXI	YE	+	106		ī
	82		11/15/82	W 1 T	PREPARING FOR DAY	1.0	17	т ХР	ΥL	0		SLA	ī
		AM_A	11/15/82	M 2 O	GENERAL INFORMATION	0.3		т ХІ	0	+	107		1
	83		11/15/82	M 2 A	GENERAL INFORMATION	0.3	17	т хі	0	+	108	BPO S	1
		ASL_A	11/15/82		PERSONAL BACKGROUND	0.2		т ср	ΥI		108		1
		CDE	11/15/82	MZ N	ASL_A BACKGROUND LIST OF D'S AND W'S	0.2	17		ΥI		109	AM_A	1
		R1_A R2 A	11/15/82	W 3 N	LIST OF D'S AND W'S	2.0		T CP	СК		109	CDE	1
		CDE	11/15/82 11/15/82		LIST OF DEMANDS AND WISHES	2.0		Т СР	СК		110	CDE	1
	-				LIST OF DEMANDS & WISHES CDE CONTRACT CLAUSES	2.0		T CP	CK				1
		AM A	11/15/82			1.5			YN	-	111		1
	87	CDF	11/15/82	M 2 0	PROJECT BACKGROUND	2.2			YE		112		1
		SLA	11/15/82		CONTRACT FOR CDF	2.2	17	-	YE				1
		RM_U	11/15/82		CDF WORK CONTRACT	0.1			YN		112		1
	90	CDE	11/16/82	M 2 A	VISIT BY CDF	2 5	17		YN I			_	1
		SE_FL	11/16/82	M 2 0	PROJECT BACKGROUND CONTRACT FOR CDE CDE WORK CONTRACT VISIT BY CDE VISIT BY CDE THANKS FOR TIME THANKS FOR TIME UPDATE & DATES	3.5			YN				1
	91 (CDE	11/16/82		THANKS FOR TIME	0.5			YN YE -		113		1
		SE FL	11/17/82		THANKS FOR TIME	0.1				+ D			1
		AM_A	11/18/82	T 2 00	UPDATE & DATES	0.1			YR	-	114		1
	93 (CDĒ	11/18/82	T 2 IO	THANKS FOR TIME THANKS FOR TIME UPDATE & DATES UPDATE & REVIEW	0.1			YR		115		1
										•	110	AM_A	1

94 CD	E 11/10/04		NERODUCED TO LO			
			INTRODUCED TO LO_U	1.0	17 T XS	YE +
94 LO	, ,		INTRODUCTION/ CDE	1.0	16 T XS	YE +
95 CD			PROJECT PROGRESS	0.9	17 T XS	YR +
95 RM			PROJECT PROGRESS	0.9	17 T XS	YE +
96 CD			CONTRACT/VISIT OF AM_A	0.5	17 T XP	0 0
96 RM			CONTRACT/VISIT OF AM_A	0.5	17 Т ХР	YN O
97 CD	,,		PREPARING FOR DAY	1.6	17 T XP	YL O
98 AM			BRAINSTORM ARRANGEMENTS	1.0	19 T CP	Υт +
98 SL			BRAINSTORM PLAN	1.0	17 T CP	Υт +
98 CD			PLAN FOR BRAINSTORM	1.0	17 T CP	YE +
99 M_			BRAINSTORM	0.1	22 T CP	YE +
99 CD			BRAINSTORM	0.1	17 T CP	YE +
100 SL			LUNCH & WALK	1.0	17 T CP	YI +
100 CD			LUNCH THEN WALK	1.0	17 T CP	YI +
101 AM	_S 11/22/82	2м4 о	GTR PROJECT + QA + STDS.	1.5	19 T CP	0 -
101 SL			GTR PROJECT & QA & STANDARDS	1.5	17 T CP	0 -
101 DE	_S 11/22/82	2 м 4 а	GTR PROJECT & QA & STANDARDS	1.5	14 T CP	0 -
101 CD		? М. 4 А	GTR PROJECT & QA & STANDARDS	1.5	17 T CP	0 0
102 SL	_A 11/23/82	₩°2 0	ARRANGING BRAINSTORM	2.0	17 T CP	YN +
102 CD	E 11/23/82	₩2 A	ARRANGING BRAINSTORM	2.0	17 T CP	YT +
 103 CD 	E 11/23/82	М 2 А	BRAINSTORM TECHNIQUE	0.3	17 T CP	BS +
103 RM	_U 11/23/82	:м2 о	BRAINSTORM TECHNIQUE	0.3	17 T CP	BS +
104 SL	A 11/24/82	:M2 0	FINAL ARRANGEMENTS	0.2	17 T CP	BS +
104 CD	Ē 11/24/82		FINAL ARRANGEMENTS	0.2	17 T CP	BS +
105 SL	A 11/24/82		BRAINSTORM	1.3	17 T CP	BS +
105 AS	LA 11/24/82	M15 R	BRAINSTORM	1.3	14 T CP	BS +
105 R1			BRAINSTORM	1.3	13 T CP	BS +
105 R2				1.3	13 T CP	BS +
105 S1			BRAINSTORM	1.3	13 T CP	BSO
105 DE			BRAINSTORM	1.3	14 T CP	BS -
105 CD			BRAINSTORM	1.3	17 T CP	BS +
106 SL			LUNCH	0.9	17 T CP	0 +
106 CD			LUNCH	0.9	17 T CP	YI +
107 SL			VISIT TO EXISTING RIGS	1.0	17 T CP	YQ +
107 CD			VISIT TO EXISTING RIGS	1.0	17 T CP	YQ +
108 BP			RIG FACILITY & COSTING	1.0	14 T CP	YQO
108 CD			RIG FACILITY & COSTING	1.0	17 T CP	YQ +
109 AM			APPROVAL OF MINUTES (12)	0.1	19 T XR	YNO
109 CD			APPROVAL OF MINUTES	0.1	17 T XR	YNO
110 CD			PROJECT MANAGEMENT	1.0	17 T XR	YR +
110 RM			PROJECT MANAGEMENT	1.0	17 T XR	YR +
111 CD			CAT. BRAINSTORM IDEAS	1.6	17 T CP	
112 M_A			BRAINSTORM	0.1	22 T CP	BS 0 BS +
112 SL			PROJ ORG CHART +B'STORM LIST		17 T CP	
112 CD			ORG. CHART & BRAINSTORM LIST		17 T CP	
113 BPG			COMPUTER MANUAL	0.2	14 T XC	BS +
113 BF			MEETING MINUTES	0.2		YC +
113 CDI			COMPUTER MANUAL			YC 0
114 AM	,,		PROJECT ORGANIZATION	0.2	17 T XC 19 T XR	YC O
114 CDI			PROJECT ORGANIZATION PROJECT ORGANIZATION			YT +
115 CDF			BRAINSTORM RESULTS	0.3	17 T XR	YT +
116 AM			BRAINSTORM RESULTS BRAINSTORM RESULTS	0.1	17 T CP	BS 0
IIO AM_	- II/63/86	m 6 U	DRAINSTORM RESULTS	0.2	19 T CP	BS +

Page 12/0		5											Page No 12/04/1		6
, -	.,		GTR	PR	OJE	СТ	INTERCHANGES BY DATE AND	NUMBER	2						GTR
1NT/	NO PER	SON	DATE	ТΥ	PE/I	Լ	TOPIC	HRS	S €/H	P/AC	т та	Я, Ç	1NT/NO	PERSON	DATE
,	16 CDE		11/29/82	v	2	A BI	RAINSTORM RESULTS	0.2	2 17	тС	B	30	144	CDE	12/22/82
	17 S1		11/29/82				RAINSTORM RESULTS	0.1	13	TCI	> BS	5 +		AM_S	12/22/82
	17 CDE		11/29/82				RAINSTORM RESULTS	0.1	17	TCI	Р В:	3 +		CDE	12/22/82
	18 CDE		12/03/82				RAINSTORM RESULTS	0.5	5 17	TCI	> YI	E 🕂		CDE	12/22/82
	18 RM		12/03/82				RAINSTORM RESULTS	0.5	5 17	TCI	> B	5 +		S1_A	12/23/82
	19 AM						NOT AVAILABLE)	0.0) 19	TCI	` 0	0	148	SL_A	12/22/82
	19 CDE		12/06/82	Ť	2 0	ò ò	ONTACT AM_A	0.3	3 17	ТХИ) 0	-		CDE	12/23/82
	20 AM_		12/06/82	Ť	2 10	O P	ROJECT ORGANIZATION	0.2	2 19	ТХИ	> Y'	г +	149	RM_U	12/23/82
	20 CDE	5	12/06/82	Ť	2 0	ο Pl	ROJECT ORGANISATION DETA	1LS 0.2	2 17	TXI	> Y'	r 0	150	CDE	12/23/82
	21 CDE		12/06/82		1	OF	INAL LISTING OF D'S AND W	W'S 6.0) 17	T CI	> YI	LO		CDE	12/23/82
	22 CDE	;	12/09/82	M	2	AR	EVIEW WEEKLY REPORT	0.5	5 17	ТХИ	2 YI	RO		BPO_S	
	22 RM		12/09/82	м	2	OR	EVIEW WEEKLY REPORT	0.5	5 17	ТХИ	2 YI	R 🕂		CDE	01/03/83
	23 SL						IME TO MEET	0.1	l 17	т Хі	` 0	0		CDE	01/04/83
	23 CDE						1SIT OF CDE	0.1	17	T XI) 0	0		AM_S	01/04/83
	24 SL	` A	12/13/82	ŵ	2	N D	EMANDS & WISHES/ BRAINSTO	ORM 0.5	5 17	TCI	> YI	КО		CDE	01/06/83
	24 CDE	î.	12/13/82	w	2	A D	'S & W'S AND BRAINSTORM	0.5	5 17	TCI	P YI	KΟ		AM_A	01/06/83
	25 BPC		12/13/82	M	2	OR	ETURNED MANUAL	0.8		ТХС	C YO	C + 0		R1_A	01/06/83
	25 CDF						ETURNED MANUAL	0.8		ТХС	C Y(C 0		R2_A	01/06/83
	26 S1	-					RAINSTORM REVIEW	1.5	5 13	T CI	B	s +	160	SL_A	01/07/83
	26 CDE						RAINSTORM REVIEW	ī.		TCI	B	s +		CDE	01/07/83
	27 DE	'e	12/13/82	м	2	DÕ	ODES+STANDARDS+1NFORMAT10			TCI	P Y	1 +		CDE	01/07/83
	27 CDE		12/13/82	м	2	DC	ODES, STANDARDS & 1NFO	1.0		T CI		1 +		RM_U	01/07/83
	28 CDE						ASIFIER CALCULATIONS			T CI	P Y	S 0		CDE	01/10/83
	29 SL		12/17/82	т	2 1	ō G	ASIFIER	0.:	3 17	TCI	P Y	ຊຸດ		M_A	01/12/83
	29 CDE		12/17/82	Ť	2 0	õĞ	ASIFIER DETAILS	0.3		T CI	P Y	Q O	164	M_S	01/12/83
	30 SL_	Δ.	12/20/82	т	2 1	O C	TR CONCEPTS	0.3		CS	5 Y	a +		AM_A	01/12/83
	30 CDE	<u> </u>	12/20/82	Ť	2 0	ōō	TR FLOWS & CONCEPTS	0.1		CSS		20	166	DE_S	01/12/83
	31 SL	`	12/21/82	Ť	2 1	ōs	PECIFICATION & MEETING	0.1		TSI	P SI	PO	167	RM_U	01/12/83
	31 CDE						PECIFICATION & MEETINGS			TSI		P +	168	AM_A	01/12/83
	32 CDE						ROJECT PROGRESS			ТХІ		R +	169	CDE	01/13/83
	32 SE						ROJECT PROGRESS	0.3		ТХІ		E +		SL_A	01/13/83
	33 SE						983 CALENDAR	0.1		т Х		E +	170	S1_A	01/13/83
	34 CDE		12/21/82	w	ī	ΟP	REP. OF SPEC & INSTRUCTIO			TSI		P 0		DE_S	01/13/83
	35 AM		12/22/82	ï	10	õ G	REETINGS	0.1	2 19	TX		1 +	170	CDE	01/13/83
	30 MM	-^			: `	žä	DDG1E1CAE1ON			TO		D A	171	S1 A	01/13/83

12/22/82 W 2 O SPECIFICATION

12/22/82 W 2 A SPECIFICATION

12/22/82 M 2 D SPEC1F1CATION

12/22/82 M 2 D SPECIFICATION

12/22/82 W 2 A SPECIFICATION

12/22/82 M 2 L UPDATE/REPORTS

12/22/82 M 2 L UPDATE/REPORTS

12/22/82 M 2 N SPECIFICATION

12/22/82 M 2 A SPECIFICATION

12/22/82 M 3 N DRAWING OFFICE

12/22/82 M 3 A DRAWING OFFICE

140 ASL_A 12/22/82 M 2 N PRESENTATION METHODS

142 AD1_R 12/22/82 M 3 A DESIGN/DRAFTING AT R

12/22/82 W 2 N SPECIFICATION COPY

12/22/82 M 2 A PRESENTATION METHODS

12/22/82 M 2 O COST AND PROJECT CONTROL

12/22/82 M 2 A COST & PROJECT CONTROL

139 BPO_S 12/22/82 M 2 O COST ESTIMATE & SPEC. FORMS 0.1 14 T SP

1.0 13 T SP SP +

1.0 17 T SP SP +

0.2 14 T SP 0 +

0.2 17 T SP SP -

0.1 17 T SP YR 0

0.2 14 T XR YP +

0.2 17 T XR YP +

0.3 13 T SP SP +

0.3 17 T SP SP +

0.5 23 T XS YQ -0.5 22 T XS Y1 0

0.5 17 T XS Y1 0

0.5 22 T XP YE +

0.5 17 T XP YC +

SP +

SP +

YR O

YR O

0.2 17 T SP

0.2 17 T SP

0.1 13 T SP

136 S1_A

137 DE_S

138 SL_A

139 R2 A

136 CDE

137 CDE

138 CDE

139 CDE

140 CDE

141 CDE

142 M_A

142 CDE

143 M A

143 CDE

141 R1_A

T/NO	PERSON	DATE	T	YPI	E/L	TOPIC	HRS	£/H	P/	ACT	TQ	м
144	CDE	12/22/82	W	1	т	GTR CONCEPTS	0.9	17	с	SS	11	0
145	AMS	12/22/82	М	2	0	UPDATE ON PROJECT UPDATE	0.1	19	Т	XR	YR	+
145	CDE	12/22/82	М	2			0.1	17	Т	XR	YR	+
146	CDE	12/22/82	М	2	0	COST ESTIMATE & SPEC	0.1	17		SP	YC	0
147	S1_A	12/23/82	W	1	0	REVIEW SPECIFICATION	1.0	13	Т	SP	SP	+
148	SLA	12/22/82	W	1		REVIEWING SPECIFICATION	2.0			SP	SP	+
149	CDE	12/23/82	М	2	Α	REVIEW SPECIFICATION	0.5	17		SP	SP	+
149	RM_U	12/23/82				REVIEW SPECIFICATION	0.5	17		SP	SP	+
150	CDE					1983 CALENDAR	0.2	17		XS	0	+
151	CDE	12/23/82					0.1	17		XS	0	+
	BPO_S	12/29/82				REVIEWING SPECIFICATION	1.5	14		SP		+
	CDE	01/03/83				PREPARING REPORT GTR-1	9.0			XR	YR	
	CDE	01/04/83				PREPARING REPORT GTR-1	9.0	17		XR		0
	AM_S	01/04/83				SPECIFICATION	0.5	19	T	SP		+
	CDE	01/06/83				PREPARING REPORT GTR-1	3.0			XR	YR	
	AM_A					PROJECT CONTRACT CDE	1.0	13	Р Т	XC SP		0
	R1_A	01/06/83				SPECIFICATION	0.8	13		SP	SP	
	R2_A	01/06/83				SPECIFICATION	0.3			XP	SP SP	
-	SL_A					MEETING TO REVIEW SPEC	0.3			XP	SP	
	CDE					MEETING TO REVIEW SPEC REVIEW REPORT GTR-1	0.5	17		XR		÷
	CDE	01/07/83 01/07/83				REVIEW REPORT GTR1	0.5	17		XR		+
	RM_U CDE	01/10/83			Š	TEN BOUND COPIES GTR-1	4.0	17		XR	YR	
	M_A	01/12/83			ň	SPECIFICATION	0.5	22	-	SP		÷
	м_S	01/12/83				SPECIFICATION	0.5			SP	SP	
	AM_A	01/12/83				SPECIFICATION	0.5	19	Т	SP	SP	
	DES	01/12/83				SPECIFICATION	0.1	14	Т	SP	0	+
	RM_U	01/12/83	L	1	10	FINAL CDE CONTRACT	0.1	17	Т	XC	ΥN	0
	AMA	01/12/83	L	1	00	SPECIFICATION	0.2			SP	SP	0
	CDE	01/13/83			Т	PREPARE FOR DAY'S WORK	0.9	17		FS	FS	0
170	SL_A	01/13/83	W	4	N	REVIEW SPECIFICATION	1.5			SP	SP	
170	S1_A	01/13/83	W	4	A	REVIEW SPECIFICATION	1.5			SP	SP	
170	DE_S	01/13/83	W	-4		REVIEW SPECIFICATION	1.5			SP	SP	
170	CDE	01/13/83			A	REVIEW SPECIFICATION	1.5	17		SP	SP	
171	S1_A	01/13/83				COAL BED FEATURES	1.0			CP	YQ	
	CDE	01/13/83				COAL BED FEATURES	1.0	17		CP	YQ	
	AM_A	01/13/83				REPORT GTR1 & SPECIFICATION	0.3			XR	YR	
	CDE	01/13/83				REPORT GTR-1 & SPEC	0.3			XR XR		+
	M_A	01/13/83				REPORT GTR-1	0.2		_	XR	YR	
	CDE	01/13/83				REPORT GTR-1	0.5			XR		
	M_S	01/13/83				UPDATE, GTR-1, COST CONTROL	0.5	17	_	XR	YE	
	CDE	01/13/83				REPORT GTR-1 SPEC1F1CATION METHOD	1.0		-	SP	YE	
-	CDE RM U	01/14/83				SPECIFICATION METHOD	1.0	17	-	SP	YE	
	CDE	01/22/83				REVISED SPECIFICATION	5.0	17	-	SP	SP	
	CDE	01/23/83				CENTRIFUGAL CONCEPT	8.0	17		ss		ŏ
	CDE	01/24/83				CENTRIFUGAL CONCEPT	0.5	17		SS	īī	+
	RMU	01/24/83			ő	CENTRIFUGAL CONCEPT	0.5	17		SS	11	÷
	CDĒ	01/24/83				PLAN FOR DAY	0.9	17	С	ХP		+
	SL_A	01/24/83				GTR REACTOR CONCEPTS	2.5		С	SS	SK	+
	CDE	01/24/83				GTR REACTOR CONCEPTS	2.5	17		SS	SK	0
	AM_A	01/24/83			0	WEEKLY REPORT & SPEC	0.1	19	С	XR	SP	-
	-											

TYPE/L

R PROJECT INTERCHANGES BY DATE AND NUMBER

HRS &/H P/ACT TO M

TOP1C

GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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8

182 CDE 01/23/43 M 3 L 1 STUDDUCTION TO D_R 0.1 17 C X3 Y K + 212 CDE 04/18/83 M 2 A COAL CHARACTERISTICS 0.5 17 C X1 Y TO 183 CLP 01/23/43 M 3 A COAL CONDITIONS 0.3 17 C X1 Y TO 214 CDE 04/20/83 T 2 00 ORHANCE MEETING 0.5 17 C X1 Y TO 184 RLA 01/23/43 M 3 A COAL CONDITIONS 0.3 17 C X1 Y TO 214 CDE 04/20/83 T 2 10 ORHANCE MEETING 0.4 15 C X1 Y TO 184 RLA 01/23/78 M 3 A COAL CONDITIONS 0.3 17 C X1 Y TO 215 CDE 04/20/83 W 2 A COST ESTIMATE FOR VESSEL 3.0 15 C C X Y TO 185 SIA 01/23/78 M 3 A COAL CONDITIONS 0.3 17 C X1 Y TO 215 CDE 04/20/83 W 2 A COST ESTIMATE FOR VESSEL 3.0 15 C C X Y TO 185 SIA 01/23/78 M 3 A COAL CONDITIONS 0.3 17 C X1 Y TO 215 CDE 04/21/83 W 1 O VESSEL TATA 0.0 15 C C X Y TO 185 CDE 02/23/83 T 2 20 DENDET HOUGRESS 0.1 17 C XX Y W + 216 CDE 04/21/83 T 20 DENDET MEDED 0.1 17 C XC YC 187 SLA 02/14/83 M 4 A PROJECT REVIEW MEETING 6.0 17 C XX Y W + 216 CDE 04/22/83 T 2 10 DUDET PHICE REPED 0.1 17		INT/NO	PERSON	DATE	TYPE/L	ТОРІС	HRS	£/H	Р/АСТ	TQ M	15	іт/но	PERSON	DATE	түрн	2/L	TOPIC	HRS	£/Н I	Р/АСТ	том
	- A 5	$\begin{array}{c} 181\\ 182\\ 182\\ 182\\ 183\\ 183\\ 184\\ 184\\ 184\\ 185\\ 186\\ 186\\ 186\\ 187\\ 187\\ 187\\ 187\\ 187\\ 187\\ 187\\ 187$	CDE D_R SL_A CDE CDE CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE SL_A CDE CDE CDE SL_A CDE CDE SL_A CDE CDE SL_A CDE CDE CDE SL_A CDE CDE CDE CDE CDE CDE CDE CDE CDE CDE	01/24/83 01/24/83 01/24/83 01/27/83 01/27/83 01/27/83 01/27/83 01/27/83 01/27/83 02/127/83 02/03/83 02/03/83 02/14/83 02/14/83 02/14/83 02/15/83 02/15/83 02/15/83 02/15/83 02/15/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/21/83 02/25/83 02/25/83 02/25/83 02/25/83 02/25/83 02/25/83 02/26/83 02/26/83 02/26/83 03/08/83 03/08/83 03/08/83 03/08/83 03/08/83 03/08/83 03/08/83 03/08/83 03/08/83 03/14/83 03/14/83 03/14/83 03/14/83 03/14/83 03/14/83	M M M M M M W T T M M M M M L L W W W W M M L L L W W L L L W W W W	WEEKLY REPORT +SPECIFICATION GENERAL CHAT INTRODUCTION TO D_R INTRODUCTION TO D_R PROJECT PROGRESS COAL CONDITIONS COAL CONDITIONS COAL CONDITIONS COAL CONDITIONS COAL CONDITIONS COAL CONDITIONS COAL CONDITIONS CENTRIFUGAL CONCEPT CENTRIFUGAL CONCEPT CONSTRUCTING GTR PROJECT REVIEW METING PROJECT REVIEW MEETING PROJECT REVIEW MEETING PROJECT REVIEW MEETING PROJECT REVIEW MEETING PROJECT PROGRESS PROJECT PROGRESS REVIEW OF ICED PAPER REVIEW OF ICED PAPER PLAN FOR DAY REACTOR CONCEPTS FLUIDIZED BED TESTS REACTOR CONCEPTS FLUIDIZED BED TESTS DESIGN CONTRACT SIGNED CDE SIGNED SUBJENCTIONS CASIFIER SIGNED CDE SIGNED SUBJENCTIONS SIGNED CDE SIGNED SUBJENCTIONS	$\begin{array}{c} 0.1\\ 0.1\\ 0.5\\ 0.3\\ 0.3\\ 0.3\\ 0.3\\ 0.3\\ 0.3\\ 0.3\\ 0.3$	$\begin{array}{c} 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 13\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17\\ 17$	CCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCCC	SYI 9 + + + 00 - + 0 + 0 + + + + + + + + 00 O O O + 00 O O O O		$\begin{array}{c} 211\\ 2112\\ 212\\ 213\\ 2114\\ 2115\\ 2116\\ 2119\\ 22212\\ 222222222222222222$	ASL_A CDE A CDE CCE CDE CDE VE CDE CDE VE CDE CDE CDE CDE CDE CDE CDE CDE CDE CDE	04/18/83 04/18/83 04/18/83 04/20/83 04/20/83 04/20/83 04/20/83 04/20/83 04/20/83 04/20/83 04/21/83 04/21/83 04/21/83 04/22/83 04/22/83 04/22/83 04/22/83 04/22/83 04/22/83 04/22/83 04/22/83 04/22/83 04/25/83 04/26/83 04/	MMWWTTTTWWWWTTTTTTMMWWWWWMMMMMWWWMMLWTTTTWTTTTMMWWWW 222222222211222222222222211233322211222221222222	0 A 0 A 0 100 I A 0 0 0 0 100 N 0 0 A 0 A 0 A 0 A 0 A 0 0 0 0 0 0 0	PREPARATION OF A-FORM PREPARATION OF A-FORMS COAL CHARACTERISTICS COAL CHARACTERISTICS CONTROLS DESIGN ARRANGE MEETING ARRANGE MEETING COST ESTIMATE FOR VESSEL VESSEL DRAWING VESSEL WTS & COSTS BUDGET QUOTE NEEDED BUDGET PRICE GIVEN BUDGET PRICE GIVEN BUDGET PRICE GIVEN BUDGET PRICE GIVEN BUDGET FOR CHAIN HOIST COST ESTIMATE/A-FORM COST ESTIMATE/A-FORM COST ESTIMATE (INT. REACTOR) 9 COST ESTIMATE SHEETS COST OF INCONEL GREETINGS PROJECT COST JUSTIFICATION GREETINGS COMPUTER PACKAGES COSTS/CALCULATIONS/CONTROLS A-FORM & COSTS A-FORM & COSTS A-FORM & COSTS A-FORM PREPARATION A-FORM PREPARATION A-FORM PREPARATION A-FORM PREPARATION A-FORM PREPARATION A-FORM COSTS A-FORM COSTS A-FORM COSTS A-FORM A COSTS A-FORM COSTS A-FORM A COSTS A-FORM BEDIMENT DESIGN WEEKLY REPORTS THANKS FOR HELP THANKS FOR AS TOR DATION COAL FEEDER PRICE MORE DETAILS ON PRICE MEETING ARRANGEMENT USE OF PAHL & BEITZ A-FORM & DRAFT PLAN FOR DAY HEATING/GAS REACTIONS	$\begin{array}{c} 2 \\ 2 \\ 2 \\ 2 \\ 3 \\ 3 \\ 2 \\ 3 \\ 2 \\ 3 \\ 2 \\ 3 \\ 0 \\ 0 \\ 0 \\ 1 \\ 1 \\ 1 \\ 1 \\ 1 \\ 1 \\ 1$	47377675757777557600000000000000000000000	XXXII XXPIICCCCCCCCCCCCCCCCCCCCCCCCCCCCC	YQ +0+0+0+++++++++++++++++++++++++++++++

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	12/04/8		GTR	PROJE	CT INTERCHANGES BY DATE AND NU	MBER				12/04/8	16		GTR	PROJE	CT INTERCHANGES BY DATE AND N	UMBER		
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	241	SL_A		м 2	A GAS REACTION CALCULATIONS		17 C		YN O Ys o		SL_A CDE	06	/03/83	M 2 0	COST JUSTIFICATION A COST JUSTIFICATION H CDE IN HOSPITAL O VESSEL QUOTATION D DEFINITE QUOTATION D GTR-2 REPORT D PREPARING FOR DAY D UPDATE & INFORMATION A UPDATE 1NFO	0.1	17 C XC 17 C XC	0 0 YN 0
		S1_P AM_A	05/03/83		O GAS REACTION CALCULATIONS O A-FORM DRAFT	0.3	13 C 19 C	XR		268	CDE	06	/04/83	Z 1	H CDE IN HOSPITAL	0.0	17 C XS	0 0
	242	CDE	05/03/83	M 2	A A-FORM DRAFT	0.2	17 C	XR	YN +	269	CDE	06	/17/83	T 2 1	VESSEL QUOTATION	0.1		YC 0 YC 0
	243	ASL A	05/09/83	W 3	N COST ESTIMATE/JUSTIFICATION	2.0	14 C	XC	YP +	269 270	SE_VE	06	/17/83	T 2 0	D DEFINITE QUOTATION	2.0		YRO
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	244	CDE	05/09/83	M 2	A COST ESTIMATE		17 C		YN +		CDE		/10/05	M 6 /	A OFDATE INFO			YR +
	245	CDE	05/10/83	W 1	O REVISED A-FORM		17 C		YN O		SL_A	07	/18/83	M 2 1	N RAISE MAX TEMP/PRESSURE		17 C EV 13 C EV	YS O YS O
	246	CDE	05/11/83	W 1			17 C 17 C		YR O YR O		S1_P CDE	07	/18/83	M 2 V	D GAS REACTION CALCULATIONS A GAS REACTION CALCULATIONS			YSO
	247 248		05/12/83	W 1 W 1	O REPORT GTR-2 PREP O CORRECTIONS/COST JUSTIF.		17 C		YN +		CDE	07	/18/83	M 2	A RAISE MAX TEMP/PRESSURE	0.2	17 T SP	SP 0
	248		05/16/83	w 1	T COST BENEFIT EXAMPLES		17 C		YN +	275	S1_A	07	/18/83	M 2	P PROJECT UPDATE			YR O
		S1_A			O PROJECT UPDATE	0.4	13 C	XR	YE +		CDE	07	/18/83	M 2	P PROJECT UPDATE L REPORT & UPDATE L GTR-2 REPORT/UPDATE D PROGRESS ON PROJECT A PROJECT PROGRESS	0.1	17 C XR 13 C XR	YR O YR O
	250	CDĒ			A PROJECT UPDATE		17 C		YE +		R2_A CDE	07	/18/83	M 2	L REPORT & UPDATE	0.1		YRO
		AM_A			O BRAINSTORM TAPE		19 C 17 C		Y1 + YE +		ASL_A	07	/18/83	M 2 0	PROGRESS ON PROJECT	0.1		YR -
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		AM_A	05/16/83	M 3	A PROJECT COST JUSTIFICATION		19 C		YM +	278		07	/19/83	W 1 (D PROJECT DESCRIPTION	7.0		YP - YC 0
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σ		S2_A	05/16/83	W 3	O DATA FOR COST JUSTIFICATION	0.6	13 C	XC	YS +		M_A	07	/22/83	L 1 0) GTR PROJECT	1.5	22 C XR	YE + YC +
		CDE	05/16/83	W 3	A DATA FOR COST JUSTIFICATION		17 C		YS +		CDE	07	/22/83	W 1 (COST ESTIMATE BREAKDOWN	3.0	17 C XC 17 C XC	YC + YC -
		BPO_S	05/16/83	М 3	O PROJECT COST EST. & DESIGN	0.4	14 C 14 C		YC - YC +	284	DG	07	/24/83	T. 1 10	O GTR PROJECT	0.3	27 C EV	0 0
		SO_S CDE	05/16/83	M 3	A COST ESTIMATE & DESIGN	0.4	17 C		YC +		ĂM A	07	/25/83	м 2	O COST ESTIMATE	0.6	19 C XC	YC +
		AM_A	05/16/83	M 2	O STATEMENT BY BPO_S	0.1	19 E	ХP	YR -		CDĒ	07	/25/83	M 2	A COST ESTIMATE	0.6	17 C XC	YC O
		AM_S	05/16/83	M 2	O UPDATE	0.1	19 E		YR O		AM_A	07	/25/83	M 2 1	D REPORT GTR-2	0.8	19 C XR 17 C XR	YR + YR +
		CDE	05/16/83	M 2	A UPDATE	0.1	17 E 17 C		YR + Yn o		CDE SL_A	07	/25/83	M 2 .	C LUNCH	1.0	17 C XS	0 0
		CDE ASL_A	05/16/83	M 2	A STATEMENT BY BPU_S	0.3	14 C		Y1 +		CDE	07	/25/83	M 2	LUNCH	1.0	17 C XS	0 0
		R1_A	05/23/83	M 3	N GENERAL UPDATE	0.3	13 C		YN -		SL_A	07	/25/83	M 2	N GTR-2 & DESCRIPTION	1.5	17 E RC	0 -
		CDE	05/23/83	М З	O PROJECT COST EST. & DESIGN O PROJECT COST EST. & DESIGN A COST ESTIMATE & DESIGN O STATEMENT BY BPO_S O UPDATE A UPDATE A STATEMENT BY BPO_S O COST JUSTIFICATION N GENERAL UPDATE A COST JUSTIFICATION O WEEVLY DEDORTS & DEOMIS	0.3	17 C		YN O		CDE	07	/25/83	M 2	COST ESTIMATE BREARDOWN COST BENEFIT EXAMPLES COST BENEFIT COST ESTIMATE COST COST ESTIMATE COST EST	$1.5 \\ 1.3$	17 E RC 17 E RC	0 0 YS -
		AM_A	03/23/83	M 2	O WEEKLI KEPOKIS & TROMIS		19 E		00		SL_A CDE	01	160/00	m 2.	N GAS CALCS/OPEN DAY A GAS CALCULATIONS/OPEN DAY	1.3	17 E RC	YS O
		BPO_S			O A-FORM & COMPUTER D ARRANGE TIME TO MEET		14 E 14 E		0 +		S1_P	07	/25/83	M 2 1	O GAS REACTION CALCULATIONS		13 E SC	YS O
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		ASL_A	05/23/83	M 2	O SALARIES & MANAGEMENT		14 C		Y1 -	292					T PLAN OF WORK	0.5	17 E XP 17 E X1	YL O YF O
		CDE	05/23/83		A SALARIES & MANAGEMENT		17 C		Y1 0	293 294	CDE				D PRODUCT LITERATURE D DETAILS ON VESSEL PRICE		17 C XC	YC +
		DE_S			D GTR CONCEPT/MAJORCA		14 C 17 C		Y1 + Y1 -	294	SE VE	07	/27/83	т 2 0	D MORE DETAILS ON PRICE		15 C XC	YC +
		CDE CDE			D GTR CONCEPT/HOL1DAYS A A-FORM & COMPUTER		17 C		YN O	295	CDE	07	100100	W 0	A CTD CONCEDT	1.3	17 C X1	YE +
		CDE	05/23/83	м 2	A WEEKLY REPORT & PROM1S	0.1	17 C	XC	YR O		LO_U	07	/28/83	M 2	O GTR CONCEPT	1.3	16 C X1 17 C X1	Yର + Yର +
	264	ASL_A	06/02/83	т 20	O PROCESSING A-FORM		14 C		Y1 +		CDE LO_U	07	/28/83	T 2 0	D GASIFIER FLOWS	0.2	16 C X1	YQ +
		CDE			O PROCESSING A-FORM		17 C 19 C		Y1 + YC 0		CDE	07	/28/83	w 1	D BED FLOWS/SIZES	7.5		YSO
		AM_A CDE	06/03/83	M 2	O COST JUSTIFICATION A COST JUSTIFICATION		17 C		YN O	298	CDE	07	/29/83	м 2	A TAR FLOWS/CONTACTS	0.5	17 E X1	
		MA	06/03/83	M 2	O COST JUSTIFICATION	0.2	22 C	XC	YN +		LO_U	07	/29/83	M 2	O GTR CONCEPT O GASIFIER FLOWS O GASIFIER FLOWS O BED FLOWS/SIZES A TAR FLOWS/CONTACTS O TAR FLOWS/CONTACTS O TAR FLOWS/CONTACTS O VISIT TO M	0.5	16 F X1	YQ +
		CDE			A COST JUSTIFICATION	0.2	17 C	хс	YN O	299	SL_A	07	/29/83	120	O VISIT TO M	0.4	17 E XP	IN U

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	392 (393 5 393 (394 1 394 (394 0 395 A 395 (AM_A CDE SL_A CDE DE_S CDE CDD AM_S CDE	10/17/83 10/17/83 10/17/83 10/17/83 10/17/83 10/17/83 10/17/83 10/17/83 10/17/83	M 2 O M 2 A W 2 O W 2 A M 3 D M 3 D M 3 D M 2 O M 3 N	PROJECT REVIEW INNER REACTOR DETAILS INNER REACTOR DETAILS WHESSOE PVE-5 WHESSOR PVE-5 WHESSOE PVE-5 WHESSOE PVE-5 WHESSOE PVE-5	0.3 0.3 1.3 1.3 0.5 0.5 0.5 0.1 0.1	17 1 17 1 17 1 14 1 17 1 15 1 19 1 17 1	E XR E ML E ML E XI E XI E XI E XI E XI E XI	YR + II + II 0 0 + YE + YE - YE + YE + YE +	418 419 420 421 422 423 423 423 424	CDĒ CDE SL_A CDE SL_P CDF M_A	11/14/83 11/14/83 11/17/83 11/17/83 11/17/83 11/18/83 11/18/83 11/18/83 11/18/83	M 2 W 1 W 1 W 1 M 2 M 2 M 4	O GREETING ONLY A GREETINGS ONLY T PRESENTATION APPROACH O PREPARING OVERHEADS O PREP OF TRANSPARENCIES T PLAN FOR DAY O COAL CHARACTERISTICS A COAL CHARACTERISTICS R DRY RUN OF PRESENTATION R PRESENTATION DRY-RUN	0.1 0.9 9.5 3.0 0.9 1.5 1.5 2.2	17 E XS 17 E XS 17 E XR 17 E XR 17 E XR 17 E XR 17 E XI 17 E XI 17 E XI 22 E XR	YI + YI + YL + YP + YP 0 YL + YI + YI + YI + YP +
	396 A 396 F 396 C 397 A 397 C 398 D	XI_A XI_A XM_A XDE Q_G	10/17/83 10/17/83 10/17/83 10/17/83 10/17/83 10/20/83	M 3 N M 3 A M 2 O M 2 A L 1 IO	JOKES/STORIES GENERAL M, CONTROLS DESIGN D_G/CONTROLS DESIGN PROPOSED GTR DESCRIPTION	0.2 0.2 0.6 0.6 0.6	13 1 17 1 19 1 17 1	E XS E XP	YH + YH + YI + YI + YI +	424 424 425 425 425	SL_A CDE SL_A CDE	11/18/83 11/18/83 11/18/83 11/18/83 11/18/83	M 4 M 4 M 2 M 2	R PRESENTATION DRY RUN R PRESENTATION DRY-RUN R REACTOR CONCEPT R REACTOR CONCEPT R TAPES OF DRY RUN	2.2 2.2 1.0 1.0	17 E XR 17 E XR 17 E RC	YP + SC 0 SC 0

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	CDE	11/21/83	M 2 H	TAPES OF DRY RUN UPDATE & THANKS LETTER OF THANKS GAS/TAR SEPARATION HASKEL PUMP DATES & ARRANGEMENT DATES/ARRANGEMENTS PRESENTATION DATES LUNCH/DEFSENTATION DATES	2.0	17	E XR	0 -	452	CCE	12/24/83	L 1 D	CONTROL SYSTEM DESIGN		10 0 00	÷
	CDE	11/22/83	LIOC	UPDATE & THANKS	2.0	17	EXR	YR +		AM_A	01/02/84	ī i or	PRESENTATION & SECONDMENT		16 E XP	YI O
	DE1_M	11/23/83	LIIC	LETTER OF THANKS	0.1	15	E XR	0 0		סֿמ	01/03/94	1 1 0	\ ~~D DDAIDAM		19 E XP	
	AM_A	11/23/83	L 1 10	M MTG REVIEW	0.1	19	EXR	YR +		AD2_R	01/03/84		 D GTR PROJECT -LETTER FROM D_ D GTR PROJECT & CONCEPT D GTR PROJECT D THANKS FROM AM_A PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PROJECT FUTURE PLAN FOR DAY CASE FOR PROJECT CASE FOR PROJECT PROJECT STATUS DESIGN REVIEW DESIGN REVIEW GAS REACTION CALCULATIONS 	1.5	27 E RC	YR -
	SL_A	11/28/83	L 1 10	GAS/TAR SEPARATION	0.1	17	ERC	50 0		M_A	01/03/04		GTR PROJECT -LETTER FROM D_	G 0.2	23 E RC	0 0
	SL_A	11/28/83	₩2 L	HASKEL PUMP	2.0	17	FAI	SP 0		C_G	01/03/04		GTR PROJECT & CONCEPT	0.5	22 E RC	0 -
	CDE	11/28/83	W 2 L	HASKEL PUMP	2.0	17		SP 0		CDE	01/03/84		GTR PROJECT	0.1	22 E RC	0 0
432	АМ_А	12/05/83	M 2 0	DATES & ARRANGEMENT	1.0	10				CDE	01/04/84		THANKS FROM AM_A	0.2	17 E XS	0 +
432	CDE	12/05/83	M 2 A	DATES/ARRANGEMENTS	1 0	17	E VD	0 0	409	SL_A	01/04/84	T 2 10	PROJECT FUTURE	0.0	17 D XP	0 0
433	SL_A	12/05/83	M 2 C	PRESENTATION DATES	0.5	17	EXP	0 0		CDE	01/04/84	T 2 00	PROJECT FUTURE	0.1	17 D XP	0 +
433	CDE	12/05/83	M 2 C	LUNCH/PRESENTATION DATES	0.J	17	E AP	0 -		SL_A	01/06/84	T 2 IC	PROJECT FUTURE	0.0	17 D XP	0 0
	R2_A	12/05/83	M 3 E	VISIT TO TEST RIG BLDG	1 5	17	E XP	0 +	460	CDE	01/06/84	T 2 OC	PROJECT FUTURE	0.2	17 D XP	0 +
	BPO_S	12/05/83	M 3 F	VISIT TO TEST BLC BLDG	1.5	13	EXI	YQ +	461	SL_A	01/09/84	T 2 IC	PROJECT FUTURE	0.0	17 D XP	0 0
434	CDE	12/05/83	M3F	VISIT TO TEST RIG BLDG VISIT TO TEST RIG BLDG VISIT TO TEST RIG BLDG DAY'S EFFORTS REPORT ON DAY'S WORK CAS STOPAGE BLG BUILDING	1.5	14	EXI	YQ +	461	CDE	01/09/84	T 2 OC	PROJECT FUTURE	0.1	17 D XP	0 0
	AM_A	12/05/83	M 3 E	DAVIS DECORDS	1.5	17	EXI	YQ +		SL_A	01/09/84	T 2 OC	FEEDBACK FROM D G	0.5	17 E EI	VN V
435	CDF	12/05/93	M 2 A	DAT 5 EFFORTS	0.1	19	EXR	YIO	462	CDE	01/09/84	T 2 IC	FEEDBACK FROM D G	0.5		IN -
436	M A	12/05/03	M L A	REPORT ON DAY'S WORK	0.1	17	EXR	YR O	463	SL_A	01/11/84	T 2 IC	NEXT VISIT OF CDF	0.0		IN -
436					0.1	22	ESC	0 0	463	CDE	01/11/84	T 2 IC	NEXT VISIT OF CDE	0.1		YN -
	CDE	12/05/83	MZA	GAS STORAGE/ RIG BLDG	0.1	17	E SC	YS +	464	CDE	01/16/84	w 1 T	DIAN FOR DAY	0.1	17 E XP	YN -
	SL_A	12/08/83	T 2 00	PRESENTATION DATE PRESENTATION DATE	0.5	17	EXP	0 -		SL_A	01/16/84	M 2 0	CASE FOR DROIFCT	0.9	17 E XP	YL O
437	CDE	12/08/83	T 2 IO	PRESENTATION DATE	0.5	17	E XP	YE +	465	CDE	01/16/84	M 2 A	CASE FOR PROJECT	2.0	17 E EL	YN O
	ASL_A	12/09/83	т 2 ОО	GTR PRESENTATION & REVIEW	0.1	14	EXP	0 ÷		BPO_S	01/16/94	M 2 D	DRO IECE CELEVIC	2.0	17 E EL	YN O
438	CDE	12/09/83	T 2 IO	GTR PRESENTATION & REVIEW GTR PRESENTATION MEETING ARRANGEMENTS MEETING ARRANGEMENTS CONTROL SYSTEM DESIGN PREPARING TRANSPARENCIES FINAL ARRANGEMENTS	0.1	17	EXP	VF +	466		01/16/94	M 6 P	PROJECT STATUS	0.1	14 E EL	YN +
	AM_A	12/12/83	T 2 IO	MEETING ARRANGEMENTS	0.3	10	F YD	VD +		SL_P	01/16/04	M 6 P	PROJECT STATUS	0.1	17 E EL	YN +
439	CDE	12/12/83	T 2 00	MEETING ARRANGEMENTS	0.3	17	E VD	VD A	467		01/10/04	M 2 A	DESIGN REVIEW	0.5	17 E RD	YR +
<u>م</u> 440	CCE	12/12/83	L 1 00	CONTROL SYSTEM DESIGN	1 0	16	E NR				01/16/84	MZA	DESIGN REVIEW	0.5	17 E RD	YN +
441	CDE	12/16/83	W 1 0	PREPARING TRANSPARENCIES	7 0	17	C AP	11 - VD		S1_P	01/16/84	MZ P	GAS REACTION CALCULATIONS	0.3	13 E XR	YS +
442	AM_A	12/16/83	T 2 00	FINAL ARRANGEMENTS	· · ·	10		1P +	468	CDE	01/16/84	M 2 P	GAS REACTION CALCULATIONS	0.3	17 E XR	YS +
442		12/16/83	T 2 00		0.2			0 +		SL_A	01/16/84	M 2 A	FUTURE OPTIONS	1.0	17 D XP	YN O
443	SLA	12/16/83	T 2 10	PREPARATION FOR PRESENTATION	0.2	17	E XP	YE +	470	CDE	01/18/84	l 1 00	GTR PROJECT	4.0	17 E RD	YN O
443									471	SL_A	01/18/84	l 1 00	GASIFIER TEST RIG	1.0	17 E RC	
444	SLA	12/19/83	T 2 00	PREPARING FOR PRESENTATION	0.4	17	EXR	YP +	472	M_A	01/18/84	L 1 IO	GTR PROJECT	0.5	22 F PC	10 +
444	CDF	12/10/83	T 2 10	TAPE TRANSCRIPTION TAPE TRANSCRIPTION TAPE TRANSCRIPTION PREPARATION FOR MEETING GTR PRESENTATION DRY RUN GTR PRESENTATION DRY RUN	0.4	17 1	EXP	0 -	473	M_A	01/19/84	L 1 IO	GTR PROJECT & CONCEPT	0.5	22 E DC	0 -
445	SI A	12/20/93		TAPE TRANSCRIPTION	0.4	17	EXP	ҮН +	474	CDE	01/19/84	L 1 00	UPDATE ON PROJECT	1 5	17 E VD	
446		12/20/03		PREPARATION FOR MEETING	2.5	17 1	E XP	YP O	475	AM_A	01/19/84	L 1 IO	UPDATE	0.1		IE +
		12/20/83	W Z L	GTR PRESENTATION DRY RUN	1.0	17 1	EXR	YP -	476	AM ^T A	01/19/84	L 1 10	MEMO FROM D G	0.1	19 E XK	YRO
446									477	ам а	01/19/84		MEMO FROM D_G	0.1	19 E RC	SC 0
447	CDE	2/20/83	W 2 L	SECOND DRY RUN	1.2	17 1	E XR	YP O	478	RMU	01/19/84		CODIES OF LETTERS	0.1	19 E RC	SC +
447	км_О	2/20/83	W 2 L	SECOND DRY RUN	1.2	17 1	E XR	YP O	479	CDE	01/20/84		DRAWING TO D C	0.1	17 E XR	YR +
448	A_N	2/21/83	M4 O	SECOND DRY RUN SECOND DRY RUN MTG BEFORE PRESENTATION FINAL BRIEFING/DRY RUN DEFLIMINARY MEETING	1.0	22 1	XR	YP +	480	SL A	01/20/84		ANSWER TO D C LEMMER	0.6	17 E XS	DD +
448	AM_A	2/21/83	M4 R	FINAL BRIEFING/DRY RUN	1.0	19 F	XR	YP +	481	5.0	01/21/94		DROJECT WEETING	0.2	17 E RC	YN +
448		//00	IV	FRELIMINARI MEELING	1 0	17 1	2 VD	VD 1	482	21 4	01/21/04		PROJECT MEETING	0.1	27 E RC	0 + .
448	CDE 1	2/21/83	M4 R	MEETING BEFORE PRESENTATION	1 0	17 1	YD YD				01/23/84		VISIT OF CDE	0.1	17 E XP	0 0
449 (CDE 1	2/21/83	L 1 IO	CONTROL SYSTEM DESIGN	0.2	17 1	VD	IF T VF A	482 (01/23/84	r 2 00	VISIT OF CDE	0.1	17 E XP	0 0
450 1	D_G 1	2/21/83	M 9 A	GTR CONCEPT	2 6	27 1			483 (DE	01/23/84	1 0	REPORT GTR-3	9.5	17 E XR	YRO
450 1)_R 1	2/21/83	M 9 N	GTR CONCEPT	2.0	21 2		16/U	484	SL_A	01/30/84	r 2 IO	SUPPORT FOR GTR	0.1	17 D XP	YN +
450	D2_R 1	2/21/83	M 9 Å	GTR CONCEPT	4.0	21 E	KC DO	IK +	484 (UE .	01/30/84 1	2 00	SUPPORT FOR GTR	0.1	17 D XP	YN +
450 3	4 A 1	2/21/83	MGA	GTR DROIFCT & CONCEPT	4.0	23 E	RC	YE +	485 9	SL_A	01/30/84 1	2 00	SUPPORT FOR GTR	0.2	17 D XP	VN +
450 /		2/21/83		CTP DESENTATION	2.0	22 E	XR	YP +	485 (CDE	01/30/84 1	2 10	SUPPORT FOR GTR	0.2	17 D YP	VN A
450 \$	SL A I	2/21/82		GIN FRESENTATION	2.6	19 E	XR	YP +	486 (CDE	01/30/84 #	(1 т	PLAN FOR DAY	0.9	17 E VD	
450 0		2/21/03	A CEN	GIR PROJECT & CONCEPT	2.6	17 E	XR	YP +	487 5	SL_A	01/30/84 N	12 C	REVIEW OF CONCEPT	1 0	17 E AP	11 +
450 0		2/21/03 1	. 9 A	GIR PRESENTATION	2.6	22 E	XR	YQ 0	487 (DE	01/30/84 M	12 Č	REVIEW OF CONCEPT	1 0	17 E KU	50 +
		2/21/03 N	муА	GTR CONCEPT REVIEW	2.6	17 E	RC	YE +	488 1)_R	01/30/84	12 P	GREETING ONLY	1.0	IT E RD	SC +
450 H	UNE 1	4/41/83 5	му А	GTR PRESENTATION	2.6	17 E	XR	YE +	488 (DE	01/30/84	2 P	GREFTING ONLY	0.1	LI E XS	YI +
451 C	.ur. 1	2/21/83 I	LIOH	CONTROL SYSTEM DESIGN	0.3	17 E	XP Y	ΎΕ +		D2 R	01/30/84	3 D	GTR PROJECT	0.1	IT E XS	YI +
				MEETING BEFORE PRESENTATION CONTROL SYSTEM DESIGN GTR CONCEPT GTR CONCEPT GTR CONCEPT GTR PROJECT & CONCEPT GTR PRESENTATION GTR PRESENTATION GTR PRESENTATION GTR PRESENTATION GTR PRESENTATION CONTROL SYSTEM DESIGN		_						. . F	GAS REACTION CALCULATIONS GAS REACTION CALCULATIONS FUTURE OPTIONS GTR PROJECT GASIFIER TEST RIG GTR PROJECT & CONCEPT UPDATE ON PROJECT UPDATE ON PROJECT UPDATE MEMO FROM D_G MEMO FROM D_G COPIES OF LETTERS DRAWING TO D_G COPIES OF LETTERS DRAWING TO D_G ANSWER TO D_G LETTER PROJECT MEETING VISIT OF CDE REPORT GTR-3 SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR GTR SUPPORT FOR CONCEPT REVIEW OF CONCEPT REVIEW OF CONCEPT GREETING ONLY GTR PROJECT	0.5	23 D XP	YE +

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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T		PERSON	DATE	TYPE/	L TOPIC	u d s	ទ / អ	D/ACT	TQ M		PERSON	DATE	TYDE				
•							~/ 11	17701	1.05 (4)	131780	PERSON	DATE	TYPE/	L TOPIC	HRS	£/H P/AC1	TQM
	520	DR_S	03/05/94	W 2	D DETAILS OF GTR D DETAILS OF GTR O DETAIL DESIGN PROGRAM A GTR SYSTEMS A GTR SYSTEMS O REPORT GTR-3 A REPORT GTR-3 O ENGINEER TO CALL O ENGINEER TO CALL O SE FE TO VISIT O DATE OF VISIT FIXED O CREEP DRAWINGS/CONTROLS		•										
	539		03/05/84	M 3	D DETAILS OF GIR	3.3	17		IN -		CDE	03/07/84	M 2	A D.O. & DAY'S WORK	0.5	17 D XR	YR –
		AM_S	03/05/84	M 3	O DETAILS OF GIR	3.3	10		IN +		CCE	03/10/84	W 1	O PRINTS OF CREEP VESSEL DWGS			
		DES	03/05/84	M3	A GTR SYSTEMS	0.3	14	DYD	IN T		CDE			T PLAN FOR DAY		17 D XP	
	540		03/05/84	м 3	A GTR SYSTEMS	0.3	17		IN T		ASL_A			O PROJECT SCHEDULE		14 D XP	
	541	MA	03/05/84	M 2	O REPORT GTR-3	0.3	22	E VD			R1_A CDE			O PROJECT SCHEDULE		13 D XP	
	541	CDE	03/05/84	M 2	A REPORT GTR-3	0.3	17	FYP	VPO		DE_S	03/12/84	MJ	O PROJECT SCHEDULE	0.4	17 D XP	YG +
	542	CDE	03/06/84	T 2 0	O ENGINEER TO CALL	0.1	17	FAL	VN A		CDE	03/12/84	M 2	C PERSONAL BACKGROUND OF DE_S C DE_S BACKGROUND/LUNCH			
		SE_FE	03/06/84	T 2 I	O ENGINEER TO CALL	0.1	15	EAL	YQ +		R2 A	03/12/84	M 2	I DROIECT HEDATE	0.5	17 D XS	Y1 +
	543	CDĒ	03/06/84	T 2 I	O SE FE TO VISIT	0.1	17	EAL	YN +		CDE	03/12/84	M 2	L PROJECT UPDATE L PROJECT UPDATE L STORIES/JOKES L STORIES/JOKES L STORIES/JOKES L STORIES/JOKES O UPDATE & D.O. STAFF O UPDATE & D.O. STAFF	0.5	13 E AL	IK +
		SE_FE	03/06/84	T 2 0	O DATE OF VISIT FIXED	0.1	15	EAL	YE +		ASL A	03/12/84	M J	L STORIES/JOKES	0.3	11 E AL	
	544					0.4	17	EAL	YG +		R1 A	03/12/84	мд	L STORIES/JOKES	0.2	13 D Ye	
	544	CCE	03/06/84	T 2 I				EAL			R2_A	03/12/84	M 1	L STORIES/JOKES	0.2	13 F YS	
	545	CDE	03/06/84	W 1 (O WEEKLY REPORTS			D XR			CDĒ	03/12/84	M 4	L STORIES/JOKES	0.2	17 D XS	74 + VH ↓
	546	CDE	03/07/84	W 1 '	T PLAN FOR DAY			E XP			M_S	03/12/84	M 2	O UPDATE & D.O. STAFF	0.5	22 D XR	VR +
	547	DE_S	03/07/84	M 2 1	T PLAN FOR DAY D REVIEW COAL FEEDER D REVIEW COAL FEEDER	0.3	14	EAL	YR +		CDE	03/12/84	M 2	O UPDATE & D.O. STAFF	0.5	17 D XR	VF +
	547	CDE	03/07/84	M 2 1	D REVIEW COAL FEEDER			EAL			DR S	03/12/84	W 3	D CDE PREP. TO WORK ON D.O.	2.0	9 D FD	YE +
		SL_A	03/07/84	T 2 I	O PRESSURE & TEMP. LIMITS	0.4	17	T SP	SP 0	571	GI_S			D CDE PREP TO WORK IN D.O.	2.0	8 D FD	
	548	CDE	03/07/84	T 2 01	D PRESSURE & TEMP LIMITS	0.4	17	T SP	SP +	571	CDE	03/12/84	W 3	D PREPARE FOR WORK IN D.O.	2.0	17 D FD	YE +
		ASL_A	03/07/84	M 2 (O PROJECT SCHEDULE (R1_A+R2_A)	0.4	14	DXP	YG +		CDE	03/12/84	W 1	D REACTOR DRAWING	0.5	17 D FD	DD +
1	549		03/07/84	MZA	A PROJECT SCHEDULE			D XP			CDE	03/13/84	W 1	O WEEKLY REPORTS	2.4	17 D XR	YR O
~			03/07/84	M 2 0	O COAL STORAGE SPACE			E SC			CDE	03/14/84	W 1	T PLAN FOR DAY	0.9	17 D XP	YL -
Þ	550		03/07/84	M 2 /	A COAL STORAGE SPACE			E SC			DR_S	03/14/84	м З	D GENERAL DISCUSSIONS	0.3	9 D XR	YI O
-	551		03/07/84	M 2 1	D LAYOUT REQUIREMENTS D LAYOUT REQUIREMENTS			EAL			GIS	03/14/84	М З	D PREPARE FOR WORK IN D.O. D REACTOR DRAWING O WEEKLY REPORTS T PLAN FOR DAY D GENERAL DISCUSSIONS D GENERAL DISCUSSIONS D GENERAL DISCUSSIONS D GENERAL DISCUSSIONS D GTR VESSEL BOLTS A PROJECTS IN USA A PROJECTS IN USA A PROJECTS IN USA D WET VISITOR D VISITOR TO D.O. D VISITOR TO D.O. D VISITOR TO D.O. D VISITOR A INTRODUCED MAH T PLAN FOR DAY D REACTOR SUPPORT BEARINGS D REACTOR SUPPORT BEARINGS	0.3	8 D XR	0 +
.	552	CDE	03/07/84	w 1 1	D COAL FEED SPECIFICATION			EAL			CDE	03/14/84	M 3	D GENERAL DISCUSSIONS	0.3	17 D XR	YI +
1		AM S	03/07/84	M 2 0	D JOB APPLICANTS			E AL D XP			CDE DE_S	03/14/84	W 1	D REACTOR VESSEL DRAWING	0.8	17 D FD	DD +
			03/07/84	M 2	A DESIGN JOB APPLICANTS			DXP			SL_A	03/14/84	W 1	D GTR VESSEL BOLTS	0.2	14 D FD	YQ -
		SL_A	03/07/84	M 2 /	A RETURN OF OVERHEADS			EXR			CDE	03/14/84	MJ	A PROJECTS IN USA	2.0	17 D XS	YI +
	554	CDĒ	03/07/84	M 2 /	A RETURN OF OVERHEADS			EXR			DES	03/14/84	M 5	D VET VISITOD	2.0		YI +
	555	CDE	03/07/84	W 1 I	D PREPARING FOR AFTERNOON				CK +		DRS	03/14/84	M 5	D VISITOR TO D O	0.1	9 D VC	II +
	556	AM_S	03/07/84	м з (YI +		GIS	03/14/84	м 5	D VISITOR TO D.O.	0.1	3 D X3	IE +
	556	DE_S	03/07/84	M 3 (C LUNCH/ COAL VESSEL				YI -		CDE	03/14/84	M 5	D MAH VISIT TO D.O.	0.1	17 D XS	
	556	CDE	03/07/84	мз (C LUNCH				YI +		R1_A	03/14/84	м 3	O VISITOR	0.1	13 D XS	VI +
		AM_S	03/07/84	M 2 (C COAL STORAGE SPACE	0.1	19	E SC	YN O		CDE	03/14/84	M 3	A INTRODUCED MAH	0.1	17 D XS	YF +
		BPO_S	03/07/84	M 2 (C COAL STORAGE SPACE	0.1	14	E SC	YN +	581	CDE	03/19/84	W 1	T PLAN FOR DAY	0.9	17 D XP	YI
	558	AM_S	03/07/84	M 4 C	C COAL FEED SYSTEM	0.3	19	E CL	OG +	582	DR_S	03/19/84	₩2	D REACTOR SUPPORT BEARINGS	1.3	9 D FD	DD -
	558				denenne Infroductions			E CL	OG +		CDE	03/19/84	₩ 2	D REACTOR SUPPORT BEARINGS	1.3	17 D FD	DD +
	558								OG +		SI_P	03/19/84	м З	D H.PRESS. H.TEMP. VESSELS	0.5	13 D XH	0 0
		SE_FE	03/07/84	M 4 C					OG +		DR_S	03/19/84	м З	D H.PRESS, H.TEMP. VESSELS	Δ <u>5</u>	0 5 200	•
		BPO_S	03/07/84	M 4 E					SC +		CDE	03/19/84	M 3	D HIGH PRESS HIGH TEMP VESSELS	0.5	17 D XH	YI +
	559 559								SC +		SL_P	03/19/84	м З	D SOCIAL CALL ON D.E.	0.5	17 D XS	ΥН
			03/07/04	M 4 E					SC +		DR_S	03/19/84	м 3	D SL_P WANTED DE_S	0.5	9 D XS	0 +
	560		03/07/84	20 4 E					SC +		CDE	03/19/84	M 3	D SL_P WANTED DE_S	0.5	17 D XS	YI +
	560		03/07/84	w 3 r					YQ +		CDE	03/19/84	W 1	D BEARING CATALOGUES	1.0	17 D XI	DD O
		SE_FE	03/07/84	W 3 T				EEL			GI_S	03/19/84	MZ	D HIGH PRESS HIGH TEMP VESSELS D SOCIAL CALL ON D.E. D SL_P WANTED DE_S D SL_P WANTED DE_S D BEARING CATALOGUES D GI_S BACKGROUND C GI_S BACKGROUND P NITROGEN SYSTEM P NITROGEN SYSTEM N GAS BOTTLES + SPACE A GAS SUPPLY/RIG SPACE A GAS BOTTLES & SPACE	1.2	8 D XS	YI -
	561	MĀ	03/07/84	M 2 C					OG 0		CDE	03/19/84	MZ	C GI_S BACKGROUND	1.2	17 D XS	YI +
	561 (CDE	03/07/84	M 2 A				D XP D XP	YI +		BPO_S CDE	03/19/84	MZ	P NIIKUGEN SISTEM	0.2	14 E AL	YQ +
	562	MĀ	03/07/84	M 2 C					YN +		R1 A	03/19/04	M 2	F NIIKUGEN SISIEM	0.2	17 E AL	YQ +
	562 (03/07/84	M 2 A					YN +		R2_A	03/19/94	w 3	A CAS SUDDI V/DIC SDACE	1.2	IJ E AL	Yର +
	563 5							DXR			CDE	03/19/84	w 3	A GAS BOTTLES & SDACE	1.4	IJ E AL	YQ +
		-					• •			200				A GAS DOTTEES & AFACE	1.4	II E AL	YQO

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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I	NT/NO PERSON	DATE	TYPE/L	TOPIC	HRS	£/H	P/ACT	то м	INT/NO	PERSON	DATE	түр	E/L	TOPIC	HRS	£/H	P/ACT	TQ M
	500 G1 A	02/10/04	x 2 0	D.O. STAFF & GTR-3	12	17	EXR	VR O	619	CCE	04/06/84	W 1	н	DESIGN PROCEDURE Arrange Meeting Arrange Meeting Progress Update			т ср	
	589 SL_A							YE +	620	CDE	04/09/84	т2	10	ARRANGE MEETING			EAL	YN +
	589 CDE			D.O. STAFF & GTR-3				0 -	620	SE_FE	04/09/84	т2	00	ARRANGE MEETING	0.1	15	EAL	YN +
	590 CDE	03/19/84	W I D	CUBICLE DRAWINGS			D FD			DES	04/09/84	т 2	ID	PROGRESS UPDATE	0.2	14	D XR	YR O
	591 CDE	03/19/84	N 1 OD	PLAN & ELEVATION FO CUBICLE	0.1	17		SK -		CDĒ	04/09/84	т 2	00	DETAIL DESIGN PROGRESS	0.2	17	D XR	YR -
	592 DR_S	03/19/84	LIID	PLAN & ELEVATION OF CUBICLE	0.1		D FD	0 0		SL_A	04/09/84	τ 2	ŤŌ	POOR DETAIL DESIGN PROGRESS				YI O
	593 SL_A	03/20/84	T 2 IO	CREEP STRESS	0.5	17	D XS	DG O		CDE	04/09/84	т 2	ñ	POOR DETAIL DESIGN PROGRESS	0.5	17	DXR	YI -
	593 CDĒ	03/20/84	т 2 ОО	CREEP STRESS	0.5	17	D XS	DG O		~~~								YL -
	594 CDE	03/21/84	W 1 O	VESSEL LAYOUT	0.9	17	D FD	DD -		DDE	04/09/04		1	CENEDAL ON DRAWINGS	0.2	à		YN +
	595 DE_S	03/21/84	M 2 D	GREETINGS	0.1	14	D XS	YI +		DR_S	04/09/04	M 3	5	GENERAL ON DRAWINGS	0.2	, s		YI +
	595 CDE	03/21/84	M 2 D	GREETINGS ONLY	0.1	17	D XS	YE +		GI_S	04/09/84	MJ	0	GENERAL CHAT	0.2	17		YQO
	596 SL_A	03/21/84	M 2 0	PROJECT PROGRESS	1.0	17	D XR	YI +		CDE	04/09/84	M 3	U	GENERAL ON DRAWINGS	0.2			DD +
	596 CDE	03/21/84	M 2 A	CREEP STRESS CREEP STRESS VESSEL LAYOUT GREETINGS GREETINGS ONLY PROJECT PROGRESS PROJECT PROGRESS GAS BOTTLES/CRADLES GAS BOTTLES/CRADLES	1.0	17	D XR	YI -		DR_S	04/09/84	W 2	0	STEEL VESSEL FRAME	0.9	17		DD +
	597 R1_A	03/21/84	W 2 N	GAS BOTTLES/CRADLES	0.1	13	EAL	YN +		CDE	04/09/84	W 2	D	STEEL VESSEL FRAME	0.9	11		
	597 CDĒ	03/21/84	W 2 A	GAS BOTTLES/CRADLES	0.1	17	EAL	YN O		CDE	04/09/84	W 1	D	GRAPHICAL SYMBOLS	0.5	11	D XI	CK +
	598 DE_S	03/21/84	w 2 n	TECH INFO/DWG REQUIREMENTS	1.0	14	DID	YF +		SL_A	04/09/84	м з	D	REVIEW L/O DRAWINGS	0.4	17	0 00	YR O
	598 CDE				1.0			YF +		DR_S	04/09/84	м 3	D	REVIEW L/O DRAWINGS	0.4	9	DCD	YR +
								-		CDE	04/09/84	м 3	D	PLAN FOR DAY GENERAL ON DRAWINGS GENERAL CHAT GENERAL ON DRAWINGS STEEL VESSEL FRAME STEEL VESSEL FRAME GRAPHICAL SYMBOLS REVIEW L/O DRAWINGS REVIEW L/O DRAWINGS REVIEW LAYOUT DRAWINGS DETAIL DESIGN (CONTROL DESIGN	0.4	17	DCD	YR -
	600 M S	03/21/04	M 2 O	CTP-3 PEDOPT	0.1	22	EXR	YR O		00_7	01/05/01		~	DETRIE DESIGN/CONTROL DESIGN				YN O
	600 M_3	03/21/04	M 2 V	CTD-2 DEDODT	0.1	17	EXR	YR O		CDE				DETAIL DESIGN & CONTROLS DES			EXP	YN +
		03/21/04	M 2 D	SOCIAL CALL	0.3	17	DXS	YH +		CDE				VISITOR FROM M			D XS	YI -
	601 SL_P	03/21/84	M 2 D	SUCIAL CALL	0.3	14	n Ye	YH +	629	LO_U	04/10/84	т2	00	VISITOR FROM M	0.1	16	D XS	YE +
	601 DE_S	03/21/84		SUN NEWSPAPER	0.3	13		YN +	630	CDE	04/10/84	L 1	00	3-MONTH PROJECT SUMMARY	2.0	17	D XR	YR +
1	602 R2_A	03/21/84	W 2 D	CRADLES/GAS BOTTLES	0.1	17		YN +	631	CDE	04/10/84	W 1	0	INFO FOR CCE	6.5	17	EXI	YE +
►	602 CDE	03/21/84	w 2 D	CRADLES/GAS BUILLES	0.1	17		YN O	632	M_A	04/11/84	L 1	10	3-MONTH SUMMARY	0.2	22	D XR	0 0
	603 CDE	03/21/84	T 2 00	CDE CONTACTING SE_FE	0.1	1.5		YN O	633	AM_A	04/11/84	L 1	10	3-MONTH SUMMARY & GTR-3	0.6	19	EXR	0 0
5	603 SE_FE	03/21/84	T 2 10	CUBICLE LAYOUT GTR-3 REPORT GTR-3 REPORT SOCIAL CALL SUN NEWSPAPER CRADLES/GAS BOTTLES CRADLES/GAS BOTTLES CDE CONTACTING SE_FE CDE CALLING DESIGNERS/RIG SPACE DESIGNERS/RIG SPACE PROGRESS UPDATE PROGRESS UPDATE PROGRESS UPDATE PROGRESS UPDATE CDE HELPING ON LAYOUT CDE HELPING DR_S DIMENSIONS OF CUBICLE	0.1	10	E AL	YN -	634	SL_A	04/11/84	L 1	10	VISITOR FROM M 3-MONTH PROJECT SUMMARY INFO FOR CCE 3-MONTH SUMMARY 3-MONTH SUMMARY & GTR-3 PROGRESS SUMMARY PROGRESS SUMMARY PLAN FOR DAY CUBICLE LAYOUT CUBICLE LAYOUT CUBICLE LAYOUT	0.1	17	D XR	YR O
<u> </u>	604 AM_S	03/21/84	M 3 0	DESIGN DRAFTSMAN	0.5	19		YN +	635	RM_U	04/11/84	L 1	10	PROGRESS SUMMARY	0.1	17	D XR	YR O
1	604 DE_S	03/21/84	MJA	DESIGNERS/RIG SPACE	0.5	17		IN T	636	CDE	04/11/84	W 1	Т	PLAN FOR DAY	0.9	17	D XP	YL +
	604 CDE	03/21/84	MJA	DESIGNERS/RIG SPACE	0.5	17	ECL	YR O	637	SL_A	04/11/84	м 2	0	CUBICLE LAYOUT	0.2	17	E CL	DD O
	605 SL_A	03/21/84	M4 D	PROGRESS UPDATE	0.5	14				CDĒ	04/11/84	M 2	A	CUBICLE LAYOUT	0.2	17	E CL	DD O
	605 DE_S	03/21/84	M4 D	PROGRESS UPDATE	0.5	14	DXR	IK -		DE_S	04/11/84	м 3	D	BEARINGS - WRONG CATALOGUE	0.3	14	D XI	DD O
	605 DR_S	03/21/84	M4 D	PROGRESS UPDATE	0.5		DXK	YR -		DRS	04/11/84	М 3	D	BEARINGS - WRONG CATALOGUE	0.3		D XI	DD +
	605 CDE	03/21/84	M 4 D	PROGRESS UPDATE	0.5	17	DXK	YR +							0.3	17	D XI	DD -
	606 DR_S	03/21/84	W 2 D	CDE HELPING ON LAYOUT	0.5		DFD	YE +		DE_S	04/11/84	W 3	D	COAL FEEDING SYSTEM	2.0	14	E SL	0 +
	606 CDE	03/21/84	W2 D	CDE HELPING DR_S	0.5	17	DFD	YE +		CDE	04/11/84	W 3	D	COAL FEEDING SYSTEM	2.0	17	E SL	II +
		,,								SE FE	04/11/84	W 3	D	COAL FEED SYSTEM	2.0	15	E SL	II +
	608 CDE			DRAWING REGISTER			DID			DES	04/11/84	м 3	Č	LUNCH	0.6	14	E EL	0 -
	609 SL_A	03/21/84	M 2 O	GAS UTILIZATION & CRADLES	0.4		EAL			CDĒ	04/11/84	М 3	Č	LUNCH & COAL SYSTEMS	0.6	17	E EL	YN +
	609 CDE			GAS UTILIZATION/CRADLES			EAL	YL +		SE_FE	04/11/84	M 3	č	BEARINGS/WRONG CATALOG COAL FEEDING SYSTEM COAL FEEDING SYSTEM COAL FEED SYSTEM LUNCH LUNCH & COAL SYSTEMS LUNCH COAL STORAGE DRUMS COAL STORAGE DRUMS COAL STORAGE SYSTEM COAL HOPPERS COAL HOPPERS SELE PERCEPTION INVENTORY	0.6	15	E EL	YN +
	610 CDE			CLARIFICATION ON SPEC			EAL	SP +		DE_S	04/11/84	W 3	Ď	COAL STORAGE DRUMS	1.5	14	E SS	0 +
	610 SE_FE			CLARIFICATION OF SPEC.			EAL	SP 0		CDE	04/11/84	W 3	Ď	COAL STORAGE DRUMS	1.5	17	E SS	YN +
	611 CDE			NITROGEN SYSTEM				YN +		SE FE	04/11/84	W 3	Ď	COAL STORAGE SYSTEM	1.5	15	E SS	YN +
	611 SE_FE			NITROGEN SYSTEM				YN O		R2_A	04/11/84	W 2	p	COAL HOPPERS	0.1	13	E EL	YN +
	612 CDE			INFO ON GTR PROJECT			EXI			CDE	04/11/84	W 2	p	COAL HOPPERS	0.1	17	E EL	YN +
	612 CCE			INFO ON GTR PROJECT			EXI			DE_S	04/11/84	м 3	'n	SELF PERCEPTION INVENTORY	0.1	14	DXS	0 -
	613 CCE	03/28/84	W 1 O	QUESTIONS/ARRANGEMENT				YQ +		DR_S				SELF PERCEPTION INVENTORIES				YE +
	614 CDE			LISTING OF QUESTIONS			T SP			CDĒ	04/11/84	M 3	n	SELF PERCEPTION INVENTORY	0.1		DXS	0 -
	614 CCE			LISTING OF QUESTIONS				YL +		BPO_S				COAL STORE & CUBICLE			EAL	YN +
	615 CCE			PREPARE PROPOSAL				YC +		CDE				COAL STORE & CUBICLE				YN +
	616 SE_FE	04/04/84	W 1 O	DRAWING & ITEMIZED PRICE			E XC			R2_A	04/11/94	W 2	1	LAYOUT & CONTROLS				YN +
	617 CDE			FINALIZE WORK & SCHEDULE				YG +		CDE	04/11/84	w 2	ĩ	LAYOUT & CONTROLS	1.2		EAL	YN O
	617 CCE			FINALIZE WORK & SCHEDULE			T SP			AM_A	04/11/84	м 2	ើ	LAYOUT & CONTROLS LAYOUT & CONTROLS PROGRESS ON GTR			DXR	
	618 CCE	04/05/84	W1 Н	LISTING OF INFO REQUIRED	1.0	16	тхі	YL O	510	····	,,							

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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	INT/NO	PERSON	DATE	TYPE/L	торіс	HRS	£/H	Р/АСТ	TQ M	INT/NO	PERSON	DATE	TYPE	/L TOPIC	HRS	£/H	Р/АСТ	ТОМ
- A 14	716 717 717 718 718 719 720 721 722 722 722 722 723 724 724 724 725 726 727 727 728	CCE SE_FL CDE CCE CDE CDE CDE SAO_H DR_S CDE CDE CDE CDE CDE CDE CDE CDE CDE CDE	01/30/81 05/01/81 05/01/81 05/01/81 05/01/81 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84 05/02/84	W 1 L W 2 O W 2 A T 2 IH T 2 OO W 1 H W 1 T W 1 A T 2 OO W 1 D M 2 C M 2 C P W 1 C M 2 C M 2 C P W 1 R M 2 O M 3 P M 3 P M 3 P M 4 D M 4 D M 4 D M 4 D M 4 D M 4 D M 4 D M 4 D M 1 Z IO	PREVIOUS EXPERIENCE FLOW CONTROLLERS FLOW CONTROLLERS TECH DETAILS/TRAVEL TECH DETAILS/TRAVEL REPORT ON DETAIL DESIGN PLAN FOR DAY UPDATED GAS SCHEMATIC MEETING WITH QAO_H GTR PROJECT	$\begin{array}{c} 1.0\\ 1.5\\ 0.6\\ 2.3\\ 0.5\\ 2.5\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2$	16 17 15 17 17 17 17 17 17 17 14 17 17 14 17 17 14 17 14 17 14 17 17 17	E XI D XC E AL D XR D XP E AL D XI D FD D FD D FD D FD D XS D XS D XS D XS D XS D XS D XS D X	0 0 YN + YN + YE + YI + YN + YL + DD +	744 745 746 746 746 747 748 750 751 752 753 754 755 756 756 757 758 759 759 761 761	DE_S AM_E R2_A CDE CCE CCE CCE AM_S SL_E CDE CCE CCE CCE CCE CCE CCE CCE CCE CC	05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/07/84 05/07/84 05/08/84 05/08/84 05/08/84 05/08/84 05/08/84 05/08/84 05/08/84 05/08/84 05/08/84 05/09/84 05/10/84 05/10/84	M M M L V V V L L L L M M V T T T T V M M M M M M M M M M M M	A VISIT TO M O GENERAL/MANAGEMENT A GENERAL/MANAGEMENT E CUBICLE SPACE E CUBICLE SPACE IO REPORT ON DETAIL DESIGN H STATEMENT OF PROBLEM H DEMANDS & WISHES SHEETS	$\begin{array}{c} 0.1\\ 1.0\\ 2.0\\ 0.2\\ 0.2\\ 0.5\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.2\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5$	14 19 17 13 17 16 16 16 19 22 19 22 17 17 16 9 17 17 16 9 17 17 17 16 9 17	D XS D XS E ELL T CPP D XR D XR D XR D XR D XR D XR D XR D XR	0 + YT + YT + YN + YN + AP 0 SP 0 YR 0 YR 0 YR 0 YR 0 YR 0 YT + FS 0 YE + YI + YI + YI + YI + YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR 0 YR 0 YR 0 YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR + YR 0 YR + Y
		CDE CCE CCE CCE CCE CCE CDE CCE	05/03/84 05/03/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84 05/04/84	W 1 A W 1 H W 1 H M 2 L M 2 L M 2 L M 2 R W 5 R W 5 R W 5 R M 4 D M 4 D M 4 D M 4 D M 2 D M 3 O	GEOMETRIC TOLERANCING REVIEWED ALL MATERIAL PLAN FOR DAY MESSAGE FROM AM_A MESSAGE FROM AM_A MESSAGE FOR CDE DETAIL DESIGN ORGANIZATION DETAIL DESIGN ORGANIZATION VALVES/GAS SYSTEM VALVES/GAS SYSTEM VALVES/GAS SYSTEM VALVES/GAS SYSTEM VALVES/GAS SYSTEM VALVES/GAS SYSTEM UPDATE-SCHEMATICS/TOL.CHART GEOMETRIC TOL. WALLCHART GEOM. TOLERANCE WALLCHART GEOM. TOLERANCE & UPDATE DRAWING PRINTS+CO. STANDARDS DRAWING PRINTS/CO. STANDARDS VISIT TO MRS	$\begin{array}{c} 0.3 \\ 4.0 \\ 0.9 \\ 0.1 \\ 0.5 \\ 0.2 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 5.0 \\ 0.5 \\ 0.5 \\ 0.5 \\ 0.5 \\ 0.1 \\ \end{array}$	17 16 17 13 17 19 19 17 13 13 17 15 15 15 15 15 14 1 7 1 9 1 17 1 7 17 19 19 17 15 17 15 17 19 19 19 19 19 19 19 19 19 19 19 19 19	D XI T CP D XI D XI D XI D XP D XP D XP D XP D XR E AL E AL E AL E AL D XR D XR D XR D XR D XR D XR D XI D T D XI D XI D XI D XI D XI D XI D XI D XI	YN + DG + YR 0 0 0 0 0 YN 0 YL + YL + YL + YL + YL + YL + YL + DG + DG + DG + DG + DG + 0 0 0 0 0 0 0 0 0 0 0 0 0	764 765 765 765 765 766 766 766 766 766 767	QAO_H CDE DR_S CDE QAO_H CDE CCE CCE CCE CCE CCE CCE	05/11/84 05/11/84 05/11/84 05/11/84 05/11/84 05/11/84 05/11/84 05/12/84 05/12/84 05/13/84 05/13/84	M 4 M 2 M 2 M 2 M 2 M 2 W 1 M 2 W 1 M 2 W 2 W 2 W 2 W 2	A PRESSURE VESSEL Q.A. A QUALITY ASSURANCE A P.V. QUALITY ASSURANCE C QUALITY ASSURANCE C COMPANY IN GENERAL C LUNCH C LUNCH A GTR PROJECT/UNITS A CONTRACTORS/Q.A. A CONTRACTORS/Q.A. A CONTRACTORS/Q.A. A CONTRACTORS/Q.A. B GOOD WISHES-DR_S VACATION D GOOD WISHES-DR_S VACATION T QA IN COMPANY T QUALITY ASSURANCE IN COMPANY T AIRCRAFT FLIGHT T PROJECT BRIEFING T PROJECT BRIEFING/SIGHTSEEING H CONTROLS DESIGN WORK SCHED. H SCHEDULE FOR WORK T REVIEW ALL SUBSYSTEMS T REVIEW OF EACH SUBSYSTEM	1.6 1.6 0.1 2.0 9.9 4.0 4.0 2.0 2.0 2.0	14 14 17 19 14 14 17 19 14 14 17 14 17 17 14 17 16 17 16 17 16 17 17 17 17	D XR DD XR DD XI DD X DD X	YE + YI + YI + YI + YQ 0 YQ + YQ 0 YQ + YQ 0 YQ + YI + YI + YI + YI + YI + YQ 0 YR + YG + YG + YG + YR +

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	773	SL_A	05/14/84	м 3	C VISIT TO RIG ROOM C VISIT TO RIG ROOM C ESTABLISH WORK PROGRAM L VISIT TO RIG ROOM E VISIT TO RIG ROOM O GAS SYSTEM A GAS SUBSYSTEM A GAS SUBSYSTEM D ARRANGED TO MEET D ARRANGED TO MEET D ARRANGED TO MEET N REPORT ON DETAIL DESIGN O DETAIL DESIGN PROGRESS A DETAIL DESIGN PROGRESS A DETAIL DESIGN PROGRESS O ARRANGE MEETING WITH CCE A ARRANGE MTG WITH CCE O D.O. & DETAIL DESIGN	0.6	17	EXT	YO -		~~~			H PLAN FOR DAY P PLAN FOR DAY P PLAN FOR DAY D P & I DIAGRAM O COAL/ASH REMOVAL A COAL/ASH REMOVAL A COAL/ASH REMOVAL C HOLIDAY FLATS OF DE_S C HOLIDAY FLATS OF DE_S C LUNCHTIME DRINK E LUNCHTIME DRINK E LUNCHTIME DRINK D PRESSURE VESEL SYSTEM			
	773	CDE	05/14/84	м 3	C VISIT TO RIG ROOM	0 6	17	EVT	VO I	795	CCE	05/16/84	M 2	H PLAN FOR DAY	0.5	16 F YD	VI .
	773	CCF	05/11/84	M 3	C ESTABLISH WORK DROCDAM	0.0		E	16 +	796	R2_A	05/16/84	M 2	P PLAN FOR DAY	0.2	12 5 85	16 +
		S2 A	05/14/94		L VISIT TO DIG DOON	0.6	16	EXI	YQ +	796	CCE	05/16/84	M 2	P PLAN FOR DAY	0.2	IJ E XP	YL +
		36_7	05/14/04	M 3	L VISIT TO RIG ROOM	1.0	13	EXI	YQ +	797	DE_S	05/16/84	w 2		0.2	16 E XP	YL +
	774	CDE	05/14/84	MJ	E VISIT TO RIG ROOM	1.0	17	EXI	YQ O	797	CCĒ	05/16/04	w 2	D P & I DIAGRAM	2.0	14 E PL	0 -
	774	CCE	05/14/84	М З	E VISIT TO RIG ROOM	1.0	16 1	EXI	YO +	709		05/10/84	W 2	D P & I DIAGRAM	2.0	16 E PL	DD +
	775	R1_A	05/14/84	W 2	O GAS SYSTEM	2.0	13 1	F PI	VO +	198	R1_A	05/16/84	W 3	O COAL/ASH REMOVAL	1.3	13 E AL	YO +
	775	CCE	05/14/84	W 2	A GAS SUBSYSTEM	2 0	16 1		YO .	798	R2_A	05/16/84	W3,	A COAL/ASH REMOVAL	1.3	13 E AL	VO +
	776	SL A	05/14/84	W 1	A CAS SYSTEM	2.0	10 1		10 +	798	CCE	05/16/84	W3.	A COAL/ASH REMOVAL	1 3	16 E AL	19 7
	777	DE S	05/14/84	14 2	D APPANCED TO MEET	1.0	17 1	ERC	SC 0	799	DE_S	05/16/84	M 2	C HOLIDAY FLATS FTC	1.5	IU E AL	YQ +
			05/14/04		D ARRANGED TO MEET	0.3	14 1	E XP	YI O	799	CCĒ	05/16/84	M 2	C HOLIDAY FLATS OF DE C	1.0	14 E XS	YH +
	777	61_5	05/14/84	MJ	D ARRANGED TO MEET	0.3	8 1	E XP	YI O	800	R1 A	05/16/84	N 2	C HUNCHTINE DUTIN	1.0	16 E XS	YI O
	777	CDE	05/14/84	м 3	D ARRANGED TO MEET	0.3	17 1	E XP	YE +	800	R2_A	05/10/04	M 3 (LUNCHTIME DRINK	1.0	13 E XS	YH +
	778	M_S	05/14/84	м 3	N REPORT ON DETAIL DESIGN	0.1	22 1	D XR	YR +	000	202 202 202	05/10/84	MJ	E LUNCHTIME DRINK	1.0	13 E XS	YH +
	778	AM_S	05/14/84	м З	O DETAIL DESIGN PROGRESS	0.1	10 1	YP	YO O	800	CCE	05/16/84	м з 1	E LUNCHTIME DRINK	1.0	16 E XS	VT 🔺
	778	CDE	05/14/84	M 3	A DETAIL DESIGN PROCRESS	0.1	17 1		ND 1	801					1.0	13 E PL	NO 1
	779	AM A	05/14/84	M 2	O APPANCE MEETING WITH COP	0.1	111	JAR	IR +	801	RZ_A	05/16/84	W 3 /	A PRESSURE VESSEL SYSTEM	1 0	13 E PL	14 +
	779	CDE	05/14/84	u 2	A ABBANCE MEC MARU COR	0.1	19 1	E XP	YQ ~	801	CCE	05/16/84	W 3	PRESSURE VESSEL SYSTEM	1.0		YQ +
			05/14/04		A ARRANGE MIG WITH CCE	0.1	17 E	E XP	YQ +	802	R1_A	05/16/84	W A C	REVIEW OF CONTROLS	1.0	16 E PL	YQ +
	780	AM_S	05/14/84	M 2	O D.O. & DETAIL DESIGN	0.3	19 I) XP	YT +	802		05/16/04		REVIEW OF CONTROLS	0.3	13 E CL	SC +
	780	CDE	05/14/84	M 2	A D.O. & DETAIL DESIGN	0.3	17 [) XP	YT +			05/10/04	W 4 1	REVIEW OF CONTROLS	0.3	13 E CL	SC +
	781	AM_S	05/14/84	м з	O REVIEW QUALITY ASSURANCE MTG	0.1	19 T	N VR	VR +		DE_S	05/16/84	W 4 I	P&I DIAGRAM		14 E CL	YO +
	781	DES	02/14/84	MJ	A REVIEW Q.A. MEETING	A 1	14 7	N N N	A A	802	CCE	05/16/84	W4 I	D REVIEW P & I DIAGRAM	0.3	16 E CL	VD 1
1	781	CDE	05/14/84	м 3	A REVIEW QUALITY ASSURANCE MTG	0.1	17 1		0 0	803	CCE	05/16/84	W 1 I) FINISHED P & I BASIC	2.0	16 E DL	
-	782	AMS	05/14/84	MA	D INTRODUCTION OF CCE	0.1	11 1	XR	YR +	804	SL_P	05/16/84	M 2 I) REVIEW P & I DIAGRAM) FINISHED P & I BASIC) HOLIDAY FLATS ETC) HOLIDAY FLATS ETC) TEA	1 0	17 5 20	DD +
	782		05/14/84	M A	A CCE NET OTHERS	0.2	19 E	E XS	YI +		DES	05/16/84	M 2 T	HOLIDAY FLATS ETC	1.0	17 E XS	YH +
			05/14/04	M 4	A CCE MET OTHERS	0.2	14 E	E XS	YI +		GIŪS	05/16/84	W 1 T	TEA	1.0	14 E XS	0 +
	782	CDE	05/14/84	M 4	D INTRODUCTION OF CCE	0 2	17 5	VO S	VE .	806	CDF	05/17/04	w 0 0	CUDDI IEDO OF SALA	0.4	8 D XS	YI +
տ	102	CCE	05/14/84	M 4	A INTRODUCTION TO DE_S & AM_S	0.2	16 F	XS	YT +			05/17/84	W 2 U	SUPPLIERS OF PC'S	1.0	17 E XI	YF 🔺
	783	วน ค	03/14/04	MJ	D INTRODUCTION TO CCF	0.1	17 5	XS	VU A	806	CCE	05/17/84	W 2 A	SUPPLIERS OF P.C.S	1.0	16 E XI	VN A
•	783 (CDE	05/14/84	м з	D INTRODUCTION TO SL P	0 1	17 5	XS	VE ·	807		05/17/84	W 2 C	STATUS OF CONTROLS DESIGN	0.5	17 E XR	VP A
	783 (CCE	05/14/84	м 3		0.1	10 5		YE +	807	CCE	05/17/84	W 2 A	STATUS OF CONTROL DESIGN	0.5	16 E XR	IR U
	784	AM A	05/14/84	м з		0.1	10 1	XS	¥1 +	808	DE_S	05/17/84	T 2 II	NBR OF PRINTS TO BE MADE	0.1		IR -
	784 0	705	05/14/84	M 2		0.5	19 E	XR	YR +	808	CDE	05/17/84	T 2 00	NUMBER OF PRINTS NEEDED	0.1	14 E AL	DD O
			05/14/04	MJ	A UPDATE ON CONTROLS WORK	0.5	17 E	XR	YE +		SLA	05/17/84	T 2 TA	CONTROL SYSTEM DESIGN	0.1	17 E AL	DD +
	784 (JUE	05/14/84	M 3	A INTRODUCTION TO AM A	0.5	16 E	XR	YR +	809		05/17/04	T 2 00	CONTROL SYSTEM DESIGN	0.1	17 E AL	DD -
	785 (CDE (05/14/84	W 2	B ORDERED PS/DIV 5	0.3	17 E	XI	CKO			05/11/04	1 2 00	CONTROL SYSTEM DESIGN	0.1	17 E XR	0 +
	785 (CCE (05/14/84	W 2	B ORDERED PS/DIV 5 STANDARD	0.3	16 E	XI	CKO	810	CDE	05/17/84	т 2 ОС	ARRANGE VISIT TO ERA	0.5	17 E XI	ō i
	786 (CDE (05/14/84	₩ 2	H REVIEW OF SYSTEMS	3.5	17 5	RD	eco	811		05/17/84	W 2 C	CAREFUL PLAN FOR WEEK	1.5	17 E XP	VC .
	786 (CCE (05/14/84	W 2	H REVIEW OF SYSTEMS FTC	2 6	16 8	ND	30 0	811	CCE	05/17/84	W 2 A	CAREFUL PLAN FOR WEEK	1.5	16 E XP	Yo +
	787 0	DE (05/15/84	W I	H DIAN FOR DAY	3.5	10 E	KU	sc -	812	CCE	05/17/84	W 1 A	SPECIFICATION/LISTINGS	2 5		
	788 F	22 4 (15/15/84	M 2	D DI AN FOR DAY	0.9	17 E	ХP	YL +	813	DES	05/17/84	T 2 ID	INVITATION TO MEETING	2.3	IO E RC	SP 0
	788 0		5/15/04	M & .	P PLAN FOR DAY	0.1	13 E	XP	YL +	813		05/17/84	T 2 00	INVITE DE-S TO MEETING	0.3	14 E XP	YIO
			5/15/64	M 2 .	P PLAN FOR DAY	0.1	16 E	XP	YL +	814		05/17/04		INVITE DE-S TO MEETING	0.3	17 E XP	YI +
	789 A	м_а (J5/15/84	M 2 (O PAYMENT FOR CCE	0.2	19 E	XC	YN +	814		05/17/84	MJ A	CONTROL SYSTEM DESIGN	0.5	17 E XS	YE +
	789 0	CCE (5/15/84	м2,	A PAYMENT FOR WORK	0.2	16 E	xc	YC +			05/17/84	M 3 A	REVIEW OF PROJECT	0.5	16 E XS	Ο .
	790 F	2_A (05/15/84	W 2 1	L CONTROL SYSTEM	2.0	13 F	PC ·	vo i	814	RM_U (05/17/84	мзо	CONTROL SYSTEM DESIGN	0.5	17 E XS	VE .
	790 0	CĒ (05/15/84	W 2 1	L GAS & CONTROL SYSTEMS	2.0	16 0	nc .		815	CDE (05/17/84	W1 0	REPORTS/CORRESPONDENCE	1 4	17 E XR	IE +
	791 F	2 A (5/15/84	u 2 <i>i</i>		2.0	10 E	RC	YQ +	816	CCE (05/17/84	W 1 A	CONTROL PANELS & L.O.	1.5	IT E AR	YR +
	791 0		5/15/84		H REVIEW OF SYSTEMS H REVIEW OF SYSTEMS ETC H PLAN FOR DAY P PLAN FOR DAY O PAYMENT FOR CCE A PAYMENT FOR WORK L CONTROL SYSTEM L GAS & CONTROL SYSTEMS C LUNCH L GAS/TAR EXIT CONTROLS L GAS/TAR EXIT SYSTEM D GENERAL CHAT	1.5	13 E	XS	YI +	817	CDE d	05/18/84	w 2 т	CONTROL PANELS	1.0	16 E SC	OG +
			S / 1 S / C 4 /	m 2 (w 0 -		1.5	16 E	XS '	ҮН +	817		05/18/84		CONTROL PANELS	1.5	17 E AL.	DG +
	792 R	<u> </u>	5/15/84	77 Z I	L GAS/TAR EXIT CONTROLS	2.3	13 E	AL '	YQ +	818		5710704	" 6 T	DENTRUL PANELS	1.5	16 E AT.	DC +
	792 C	CE C	00/15/84	w 2 1	L GAS/TAR EXIT SYSTEM	2.3	16 E	AL '	YO +			35/10/04	m J D	DRAWING PRINTS	0.2	14 E AL	DD 0
	793 D	DE_S C	5/15/84 1	W 3 I	D GENERAL CHAT	1.0	14 F	PI 4	o _	818		5718/84	м З D	DRAWING PRINTS	0.2	17 E AL	
	793 G	n_a u	10/10/64	W 3 1	D GENERAL CHAT	1 0	9 10	DI 4	0 Ŧ	818	JUE (5/18/84	M 3 D	DRAWING PRINTS			
	793 C	CE O)5/15/84 \	₩3 I	D P & I DIAGRAM	1 0	16 5	гы (DI (819	\M_S ()5/18/84	мз о	INVITATION TO SAFETY OFFICER	0.1	10 5 75	0 00
	794 C	CE O	5/15/84	w i r	D P & I DIAGRAM	1.0	10 E	rL	+ UU	819					0 1		0 0
	795 C	DE O	5/16/84	u 2 u	PLAN FOR DAY	3.3	10 E	PL 1	עט +	819 (DE C	05/18/84	M 3 A	SO_H TO MEETING	0.1	14 E XP	0 0
				- <u>-</u> - 1	D GENERAL CHAT D GENERAL CHAT D P & I DIAGRAM D P & I DIAGRAM H PLAN FOR DAY	0.5	17 E	XP 1	YL +	820 /		5/18/84	T 2 00	SO_H TO ATTEND MEETING	0.1	17 E XP	YN +
											· ·	.,,		SO_A TO ATTEND MEETING	0.2	19 E XP	0 0
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		05/19/91	т 2 1	O GTR CONTROL SYSTEM P INTRO TO CCE P INTRO TO CCE P INTRODUCTION TO BPO_S R VALVES/GAS SYSTEM R VALVES/GAS SYSTEM R VALVES/GAS SYSTEM R VALVES/GAS SYSTEM C VALVES/GAS SYSTEM O GTR PROGRESS A GTR PROGRESS C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C LUNCH C VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM C VALVES/CAS SYSTEM C VALVES/	0.2	14 E XP	0 0	839	CDE	05/21/84	W 2	T REVIEW P & I DIAGRAM T REVIEWING P & I DIAGRAM	3.0	17 E CL	
) SO_H	05/18/84	N 3	P INTRO TO CCE	0.1	14 E AL	YI +			05/21/84	W 2	T REVIEWING P & I DIAGRAM	3.0	16 E CL	
	BPO_S	05/18/84	M 3	P INTRO TO CCE	0.1	17 E AL	YN +					D SAFETY OFFICER		14 E XR	0 0
	L CDE L CCE	05/18/84	м 3	P INTRODUCTION TO BPO S	0.1	16 F. AL	YN +		CDE			O SAFETY OFFICER		17 E XR	0 -
	$2 R1_A$	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	13 E AL	YL +		R1_A	05/22/84	T 2 I	O UPDATE/ELEMENTS		13 E XI	
	2 R2_A	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	13 E AL	YL +					O UPDATE/ERA FURNACE ELEMENTS			DG +
	CDE	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	17 E AL	YL +		CCE			A PROGRAMMABLE CONTROLLER		16 E XI	
	CCE	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	16 E AL	YL +		SE_FL	05/22/84	T 2 1	O PROGRAMMABLE CONTROLLER		15 E XI	
82	SEL VA	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	15 E AL	YL +		DE_S	05/22/84	TZU	D SAFETY OFFICER TO ATTEND MTC	10.2	14 E XP	0 + 0 +
82	SE2 VA	05/18/84	W 6	R VALVES/GAS SYSTEM	2.5	15 E AL	YL +		SO_H	05/22/84	T 2 I	O MEETING ON GTR D SAFETY OFFICER O SAFETY OFFICER O NOTICE ON PRESENTATION O NOTICE ON PRESENTATION	0.2	14 E XP	
	AM_A	05/18/84	м 2	O GTR PROGRESS	0.1	19 E AL	YN +		DE_S CDE	05/22/84	T 2 1	D SAFETT OFFICER	0.1	17 E XP	
	CDE	05/18/84	м 2	A GTR PROGRESS	0.1	17 E AL	YN +		CDE SI A	05/22/84	T 2 T	O NOTICE ON DESENTATION	0.2	17 E XP	
	1 R1_A	05/18/84	м 6	C LUNCH	1.0	13 E XS	YH +		SL_A CDE	05/22/84	T 2 C	O NOTICE ON PRESENTATION	0.2	17 E XP	0 0
	R2_A	05/18/84	M 6	C LUNCH	1.0	13 E XS	YE +							17 E AT	ne i
82	CDE	05/18/84	M 6	C LUNCH	1.0	17 E XS	YI +		CCE	05/22/84	wi	D P & I DIAGRAM	75	16 E AL	
82	CCE	05/18/84	M 6	C LUNCH	1.0	16 E XS	YI +		CDE	05/22/84	wi	H CONTROL CABINETS	3.5	17 E AL	SKO
82	\$ SEL_VA	05/18/84	M 6	C LUNCH	1.0	15 E XS	YE +		CCE	05/22/84	wi	H WRITING REPORT	5.0	16 E PD	YR +
82	SE2_VA	05/18/84	M 6	C LUNCH	1.0	15 E XS	YE +		SL_A	05/23/84	Lic	O PRESENTATION MEETING	1.0	17 D XP	YE +
	5 R1_A	05/18/84	W 6	L VALVES/GAS SYSTEM	1.2	13 E AL	IN +		CDE	05/23/84	W 2	O GTR-4 REPORT/DRAWINGS	6.0	17 E PD	RR +
	5 R2_A	05/18/84	W 6	L VALVES/GAS SISTEM	1.2	13 E AL	IN T		CCE	05/23/84	W 2	D REPORT & DRAWINGS	6.0	16 E PD	YR +
	5 CDE	05/18/84	WD	L VALVES/GAS SISTEM	1.2	II E AL			CDE	05/23/84	W 2	D P & I DIAGRAM/CONTROL FAREL D P & I DIAGRAM H CONTROL CABINETS H WRITING REPORT O PRESENTATION MEETING O GTR-4 REPORT/DRAWINGS D REPORT & DRAWINGS O GTR-4 REPORT/DRAWINGS D REPORT & DRAWINGS D REPORT & DRAWINGS	6.0	17 E PD	FT +
82	5 CCE	05/18/84	WD	L VALVES/GAS SISTEM	1.2	16 E AL	IN T		CCE	05/23/84	W 2	D REPORT & DWGS-SAME DAY AS 8	9 6.0	16 E PD	DD +
▶ 82	5 SEL_VA	05/18/84	we	L VALVES/GAS SYSTEM L VALVES/GAS SYSTEM	1.2	15 E AL	VF +	853	M_A	05/23/84	LII	O NOTICE OF PRESENTATION	0.1	22 E RD	0 0
	S SEZ_VA	05/18/84	w 7	R SOLIDS SYSTEM & CONTROLS	1.5	17 E AL	0 +	854	AM_A			O NOTICE OF MEETING		19 E RD	0 0
	5 SL_A	05/18/84	w 7	R SOLIDS SYSTEM & CONTROLS	1.5	13 E AL	ŏ Ō	855	R1_A			O NOTICE OF PRESENTATION		13 E RD	
	5 R1_A 5 R2_A	05/18/84		R SOLIDS SYSTEM R SOLIDS SYSTEM R SOLIDS SYSTEM R SOLIDS SYSTEM R SOLIDS SYSTEM R SOLIDS SYSTEM T REVIEW OF PROGRESS	1.5	13 E AL	ō ō	856	R2_A	05/23/84	LII	L NOTICE OF PRESENTATION MTG.	0.1	13 E RD	YR O
	5 CDE	05/18/84		R SOLIDS SYSTEM	1.5	17 E AL	0 +		ASL_A	05/23/84	LII	O NOTICE OF PRESENTATION	0.2	14 E RD	0 0
	S CCE	05/18/84		R SOLIDS SYSTEM	1.5	16 E AL	YE O		S2_A	05/23/84	LII	O NOTICE OF PRESENTATION	0.1	13 E RD	0 0
92	S SEL VA	05/18/84		R SOLIDS SYSTEM	1.5	15 E AL	YE -		M_S	05/23/84	LII	O NOTICE OF PRESENTATION	0.1	22 E RD	0 0
82	SE2 VA	05/18/84	W 7	R SOLIDS SYSTEM	1.5	15 E AL	YQ -		AM_S	05/23/84		O NOTICE OF MEETING	0.1	19 E RD	0 0
	7 CDE	05/18/84	м 2	T REVIEW OF PROGRESS	2.5	17 E XR	YR +		BPO_S	05/23/84		O NOTICE OF PRESENTATION	0.1	14 E RD	0 0
	7 CCE	05/18/84	M 2	T REVIEW OF PROGRESS (ON TRAIN	2.5	16 E XR	YR -		DE_S	05/23/84		O NOTICE OF MEETING	0.1	14 E RD	00
	B CDE			H DECISION ON PRESENTATION		17 E XR			RM_U	05/23/84	w 1	O REDORT CTR-4	2.0	17 E PD	
82	B CCE			H DECISION ON PRESENTATION		16 E XR			CDE CDE	05/24/84	w 2	D FINISHED DRAWINGS	1.0	17 E PD	DD -
82	9 CCE		W 1	T PROGRAMMABLE CONTROLLERS	4.0	16 E FC			CCE	05/24/84	w 2	D FINISHED ALL DRAWINGS	1.0	16 E PD	DD +
	D CCE		W 1	T T.I. CONTROLLERS	3.0	16 E FC			CDE	05/24/84	W 2	O GTR-4 FINISHED	8.5	17 E XR	YR +
	I CCE	05/20/84	W 1		8.0	16 E PL			CCE	05/24/84	W 2	L NOTICE OF PRESENTATION MIG. O NOTICE OF PRESENTATION O NOTICE OF PRESENTATION O NOTICE OF PRESENTATION O NOTICE OF MEETING O STRPATION O O NOTICE OF MEETING O O O NOTICE OF MEETING O O O O NOTICE OF MEETING O O O O O O O O O O O O O O O O O O O	8.5	16 E XR	YR +
	2 CDE				2.0	17 E XR			CCE	05/25/84	W 1	T COST ESTIMATE	1.0	16 E XC	YC -
	2 CCE			T REVIEW & PLAN (ON TRAIN)		16 E XR			CDE	05/25/84	W 1	O 10 COPIES GTR-4	1.2	17 E XR	YR +
	3 CDE	05/21/84	wz	D CONTROL PANELS/P & I DIAGRAM D CONTROL PANELS/BLOCK DIAGRAM	2.0	17 E AL 16 E AL			CDE	05/25/84	W 1	T OVERHEAD TRANSPARENCIES	1.4	17 E XR	YP +
	3 CCE	05/21/84			0.5	14 E AL		870	SL_A			R PREPARE FOR PRESENTATION		17 E XR	YP -
	4 DE_S	05/21/84				17 E AL		870	CDE			R PREPARING FOR MEETING	0.6	17 E XR	YP -
	4 CDE 4 CCE	05/21/84				16 E AL						R CONTROL SYSTEM DESIGN	2.5	23 E XR	YE +
	5 SL_A			R PROJECT ORGANIZATION & D.D.								R CONTROL SYSTEM DESIGN	2.5	19 E XR	YE +
		05/21/84	M 2	R PROJECT ORG. & DETAIL DESIGN	0.5	17 D XP	YR +					R CONTROL SYSTEM DESIGN	2.5	17 E XR	YE +
	5 CCE	05/21/84	W 1	D CONTROL PANELS	1.0	16 E AL	DD O					R CONTROL SYSTEM DESIGN	2.5	13 E XR	YP +
	7 CDE	05/21/84	м 2	T EXHAUSTED	1.0	17 E AL	0 -					R CONTROL SYSTEM DESIGN	2.0	13 E XR	YR +
	7 CCE	05/21/84	м 2	T EXHAUSTED	1.0	16 E AL	0 -					R CONTROL SYSTEM DESIGN R CONTROL SYSTEM DESIGN	2.0	14 E XR 14 E XR	TP 0
	B CDE	05/21/84	M 3	E ERA TECHNOLOGY	2.0	17 E XI	0 +		SO_H CDE			R CONTROL SYSTEM DESIGN	2.5	14 E XR 17 E XR	1₩;+ VD -
83	B CCE	05/21/84	М З	D CONTROL PANELS T EXHAUSTED T EXHAUSTED E ERA TECHNOLOGY E ERA TECHNOLOGY	2.0	16 E XI	0 +	0/1	CDE	00/20/04	MIU	R CONTROL DIGIEM DEDIGN	2.5	IT P. AK	1P +

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927 SE1_VA 06/14/84 T 2 IO FLOWS & PRESSURES 928 CDE 06/15/84 T 1 00 DESIGN DRAFTSMAN 929 AM_A 06/19/84 T 2 00 UPDATE/M/FUNDING 929 CDE 06/19/84 M 2 0 FUNDING FOR CONSTRUCTION 930 AM_A 06/19/84 M 2 A FUNDING 931 AD2_R 06/19/84 M 2 A FUNDING 931 AD2_R 06/19/84 M 2 A FUNDING 932 CDE 06/19/84 M 1 O LIST WORK TO BE DONE 933 CDE 06/22/84 W 1 O LIST WORK TO BE DONE 934 CDE 06/25/84 M 2 A A-FORM & D.O. 935 CDE 06/25/84 M 2 A A-FORM & D.O. 935 CDE 06/25/84 M 3 A FUNDING 936 AD2_R 06/25/84 M 3 A AFUNDING 937 CDE 06/25/84 M 3 A FUNDING FOR CONSTRUCTION 938 CDE 06/25/84 M 3 A FUNDING FOR CONSTRUCTION 936 AD2_R 06/25/84 M 3 A FUNDING FOR CONSTRUCTION 936 AD2_R 06/25/84 M 3 A FUNDING FOR CONSTRUCTION 936 AD2_R 06/25/84 M 3 A FUNDING FOR CONSTRUCTION 936 AD2_R 06/25/84 M 2 D LACK OF PROGRESS ON DRAWING 938 DE_S 06/25/84 M 2 D LACK OF PROGRESS ON DRAWING 938 DE_S 06/25/84 M 2 O PIPING & VALVES 1 940 CDE 06/25/84 M 2 A OFIPING & VALVES 1 940 CDE 06/25/84 M 2 O VALVES & CONTROLS 941 R1_A 06/25/84 M 2 O SCHEDULE & GENERAL 0 942 CDE 06/25/84 M 3 A DESIGN PERSONNEL 1 943 DE_S 06/25/84 M 2 O SCHEDULE & GENERAL 0 944 CDE 06/25/84 M 2 O SCHEDULE & GENERAL 1 943 DE_S 06/25/84 M 2 O MALVES & CONTROLS 1 941 SE1_VA 06/25/84 M 2 O SCHEDULE & GENERAL 1 943 CDE 06/25/84 M 3 A DESIGN PERSONNEL 1 944 AM_A 06/26/84 T 2 IO WALVES & CONTROLS 1 945 SL_A 06/25/84 M 3 A DESIGN PERSONNEL 1 944 AM_A 06/26/84 T 2 IO MESSAGE 944 CDE 06/25/84 M 3 A DESIGN PERSONNEL 1 945 SL_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 945 SL_A 06/26/84 T 2 IO MESSAGE - CDE TO CALL 945 SL_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 945 SL_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/26/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/26/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE - CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE -CDE TO CALL 946 AM_A 06/27/84 T 2 IO MESSAGE -CD	$\begin{array}{c} 0.5\\ 0.3\\ 0.3\\ 0.1\\ 0.2\\ 0.2\\ 0.2\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5\\ 0.5$	151719172291717191732291171151371917917791717917791779177917791779177	D D D D D D D D D D D D D D D D D D D	Q0000000000000000000000000000000000000	$\begin{array}{cccccccccccccccccccccccccccccccccccc$	DE1_M CDE SL_A CDE CDE SE_FE CDE SE_VE SE_FL CDE SE_FL	06/28/84 06/28/84 06/28/84 06/28/84 07/02/84 07/02/84 07/02/84 07/02/84 07/02/84 07/02/84 07/02/84 07/02/84	M 2 M 2 M 2 L 1 0 T 2 0 T 2 1 T 2 1 T 2 1 T 2 1 T 2 1 T 2 1 C 1 0 C 1 2 C 1 C 1 0 C 1 1 C 1 0 C 1 1 C 1 0 C	O COMPANY DESIGN MANAGEMENT A DESIGN MANAGEMENT T DETAIL DESIGN OF GTR T GTR DETAIL DESIGN H THANKS TO CCE H COAL FEED SYSTEM O CDE CALLING H PRESSURE VESSEL O CDE CALLING O FLOW CONTROLLERS O ARRANGE MEETING O COAL STORAGE/CUBICLES O THANKS & FINAL REPORT GTR-4 O COAL STORE & CUBICLES O PROJECT UPDATE O PROJECT UPDATE O FLOW CONTROL SYSTEM A FLOW CONTROL SYSTEM A FLOW CONTROL SYSTEM O REPORT ON VISIT TO M O D.O. & MRS A D.O. & VISIT TO M O PROJECT ORGANIZATION O PROJECT ORGANIZATION O PROJECT ORGANIZATION O PROJECT ORGANIZATION O TASK TEAM ORGANIZATION O TASK TEAMS O T	1.0 1.0 1.0 1.5 0.1 0.1 0.1 0.1 0.1 0.1	15 D XJ 17 D XI 17 D XC 17 D XC 17 D XF 17 D XF 15 D XI 15 D XI 17 D XI 15 D XI 17 D XI 15 D XI		YR +
940 CDE 06/25/84 W 2 O PIPINC & VALVES 941 R1_A 06/25/84 W 2 A PIPING & VALVES 941 R1_A 06/25/84 T 2 IO VALVES & CONTROLS > 941 SE1_VA 06/25/84 T 2 OO VALVES & CONTROLS 942 AM_A 06/25/84 M 2 O SCHEDULE & GENERAL 943 AM_S 06/25/84 M 2 A SCHEDULE & GENERAL 943 AM_S 06/25/84 M 3 A DESIGN PERSONNEL 1 943 DE_S 06/25/84 M 3 A DESIGN PERSONNEL 944 AM_A 06/26/84 T 2 OO MESSAGE - CDE TO CALL 945 SL_A 06/26/84 T 2 OO PROJECT UPDATE 945 CDE 06/26/84 T 2 IO MESSAGE - CDE TO CALL	1.5 0.1 0.1 1.0 0.5 0.5 0.5 0.1 0.1 0.1	13 17 13 15 19 17 19 14 17 19 17 17	D ID D XC D XC D XP D XP D XP D XP D XP D XP D XP D XP	DG 0 YQ 0 YQ 0 YG 0 YG 0 YT 0 YN 0 YR 0 YR 0	969 969 970 970 9710 9710 972 973 973 974 975 975 977 977 977 977 977 977	SL_A CDE SL_A CDE CDE M_A M_S AM_A AM_S SL_A RM_U	07/06/84 07/06/84 07/06/84 07/06/84 07/06/84 07/06/84 07/09/84 07/09/84 07/09/84 07/09/84 07/09/84	T 2 00 T 2 10 T 2 10 T 2 00 W 1 0 L 1 00 L 1 10 L 1 10 L 1 10 L 1 10 L 1 10 L 1 10 L 1 10	O PROJECT ORGANIZATION O PROJECT ORG/D.O. O MEETING WITH AD1_R O MTG WITH AD1_R O TASK TEAM ORGANIZATION O TASK TEAM FOR PROJECT O TASK TEAMS O TASK TEAMS O TASK TEAMS O TASK TEAMS O TASK TEAMS O TASK TEAMS	0.3 0.6 0.6 7.0 1.0 0.1 0.1 0.5 0.1 0.1	17 D XF 17 D XF 17 D XF 17 D XF 17 D XF 17 D XF 22 D XF 22 D XF 19 D XF 19 D XF 17 D XF 17 D XF		YN + YT + YT + YT + YT + O O O O YT O YT O YT O YT O YT O
947 SL_A 06/27/84 T 2 00 VISIT TO M & PROJECT ORG. 947 CDE 06/27/84 T 2 10 VISIT TO M & PROJECT ORG 948 DE1_M 06/27/84 T 2 00 FINAL M VISIT DETAILS 948 CDE 06/27/84 T 2 10 FINAL M VISIT DETAILS	0.3 0.3 0.3 1.5 0.1 0.2 0.2 0.2 0.2 0.2 0.2 0.2 0.2 3.0	17 17 15 17 19 17 19 17 19 17 17 17 19	D XP D XP D XP D XP D XC D XC D XC D XC D XC D XC D XC D XC	YI 0 0 YC YC YC YC YC YC YC YC YC YC YC YN YN YN YN YN YP	- 982 - 983 - 984 - 985 0 986 0 986 0 988 0 988 - 987 0 988 - 989 - 989 - 990 0 991 0 992 - 993 - 993 - 994	CDE SE_VE M_A CDE CDE CDE CDE CDE CDE SL_A	07/10/84 07/10/84 07/11/84 07/11/84 07/11/84 07/11/84 07/12/84 07/12/84 07/12/84	W 1 T 2 OO T T 2 OO T V 1 W 1 W 1 V 1 T 2 I 1 T 2	O BOILDING SPACE O L BUILDING SPACE O WEEKLY REPORTS ETC O BUILDING SPACE L BUILDING SPACE O CUBICLE SPACE O COAL+ELECTRICS+CUBICLE SPACE O PRESSURE VESSEL CALCS O VESSEL BOLT MATERIAL O VESSEL BOLT MATERIAL O DESIGN MANAGEMENT O DESIGN MANAGEMENT O PRESSURE VESSEL CALCS H PRESSURE VESSEL CALCS H PRESSURE VESSEL CALCS O PRESSURE VESSEL CALCS H VESSEL HEAD DRAWINGS O MEETING WITH AD1_R + CUBICLE O AD1_R MTG/CUBICLES	0.2 0.2 0.5 9.0 3.5 7.5 4.5 0.2	17 D FU 17 D FU 15 D FU 22 D XF 17 D XF 17 D FU 17 D FU 17 D FU 17 D FU 17 D FU		0 0 YR 0 YN 0 0 0 YR 0 YN 0 DG + DG 0 YT + YS 0 YT 0 YT 0 YS + YS + YS 0 YS - YS - YS - YS 0 YS - YS 0

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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	995	CINE	07/12/04			_												
			07/13/84	W 1 1	H PRESSURE VESSEL CALCS	5.0	17	D FD	YS O	1028	SL_A	07/26/84	М 3	A D.DESIGN PROGRESS & ORG.	0.4	17 D	v.,	
	996		07/14/84	W 1 1	H PRESSURE VESSEL CALCS	7.0	17 1	D FD	YS -	1028	ASL_A	07/26/84	м 3	O PROJECT STATUS & ORG.	0.4	17 D	XR	YR +
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	998	CDE	07/16/84	L 1 IC	O COAL/ELECTRICITY/CUBICLES		17 1		YN O		AM S	07/26/84	N 2	O CONTRACT DESIGN DRAFTSMAN	0.4	17 D	XR	YR O
	999	CDE	07/16/84	W 1 F	H PRESSURE VESSEL CALCS			DFD		1029		07/26/04	M 2	O CONTRACT DESIGN DRAFTSMAN	0.3	19 D	XS	YI +
	1000	CDE	07/17/84	W 1 F	I PRESSURE VESSEL CALCS			DFD			SL_A	07/20/04	M 2	A ARRIVAL OF CDD	0.3	17 D	Xs	YE +
	1001	BPO_S	07/19/84	T 2 IC	D ISSUES IN LETTER FROM BPO_S	0.2	1.1		YN +		R2_A	07/20/84	MD	R CUBICLE & ELECTRICAL NEEDS	1 5	17 D		
	1001	CDE	07/19/84	T 2 00	D ISSUES IN BPO_S LETTER		17			1030		07/26/84	M 5	R RIG SPACE & ELECTRICAL NEEDS	1.5	13 D	ID	YN +
	1002	AM A	07/19/84	T 2 10	MESSAGE TO SL_A ON AD1_R MTG	0.2			YN +		BPO_S	01/20/84	мэ	R RIG SPACE & FLECTRICS	1.5	14 D	ID	YN -
	1002	CDE	07/19/84	T 2 00	MESSAGE TO SELA ON ADI_R MIG MTG WITH ADI_R				0 0		DE_S	07/26/84	M 5	R RIG SPACE & ELECTRICAL	1.5	14 D	ĪD	VN +
	1003	CDE	07/10/94		CONTRACT ADI K			D XR		1030	CDE	07/26/84	M 5	R CUBICLE & ELECTRICAL NEEDS	1.5	17 D	Î D	VM A
	1004	NDO G	07/90/01		CONFIRM BPO_S MTG		17 1		YN O		AM_S	07/26/84	м з	O CRANES	0.2	19 D		
	1004	DFO_3	07/20/84		CONFIRMATION OF MTG		14 1		0 0						0.2	14 D		INU
			07/20/84	W 1 C	D WEEKLY REPORTS	4.0	17 [D XR	YR O	1031	CDE	07/26/84	М З	A CRANES & RIG SPACE	0.2	14 D		YN +
	1006	CDE	07/21/84	W 1 H	I VESSEL HEAD DRAWINGS	6.0	17 [D FD	DD O	1032	SL_A	07/26/84	M 4	C MORNING WEETING	0.2	17 D	ID	YNO
	1007	CDE	07/22/84	W 1 1	O CONFIRMATION OF MTG WEEKLY REPORTS VESSEL HEAD DRAWINGS VESSEL HEAD DRAWINGS O CONTACT CDF	6.5	17 [D FD	DD 0	1032	DES	07/26/84	MA	C LUNCH	0.4	17 D 1	KS 1	YI +
	1008							D XP		1032	CDE	07/26/84	MA		0.4	14 D 3		
	1008	CDE	07/23/84	T 2 IO	CALL FROM DE S		17 1		0 0	1032	CDD	07/26/04	M 4		0.4	17 D 3	(S	YE +
	1009	DR_S	07/23/84	T 2 ID) CDE CALLING BACK DE S		9 1		ŏŏ		AD1_R	07/20/04	M 4	C LUNCH	0.4	15 D 3	KS '	YIO
	1009	CDE	07/23/84	T 2 00	CDE CALLING DE_S		17 1		0 0	1033	ADI_K	07/20/84	MO	O DESIGN/DRAFTING AT R	2.0	23 D)	(P '	YQ -
	1010	DE S	07/23/84	T 2 0D	NEW DESIGN DRAFTSMAN					1033	M_A.	07/26/84	M 5	A DESIGN & DRAFTING	2.0	22 D)	KR '	YI +
	1010	CDE	07/23/84	T 2 10	NEW DESIGN DRAFTSMAN		14 [YE +	1033	AM_A	07/26/84	M 5	A CRANES & RIG SPACE A CRANES & RIG SPACE C MORNING MEETING C LUNCH C LUNCH C LUNCH O DESIGN/DRAFTING AT R A DESIGN & DRAFTING A D.O. MANAGEMENT A DESIGN & DRAFTING AT R	2.0	19 D)	(R)	YT _
1		AM A	07/23/84				17 E		YE +	1033					2.0	17 D 3	(R)	
•	1012		10/12/01	N 1 00	OPANIA REPORTS		19 E		YR O	1033	CDE	07/26/84	м 5	A DESIGN & DRAFTING	2.0	17 D 3	(p)	YI -
₽	1013		07/22/04	N I UU	ORGANIZATION CHART		19 E		YT O	1034	AM_S	07/26/84	M 2	O DESIGN & DRAFTING AT L	0.1	19 D)		
	1013		07/23/04				13 C		YN O	1034	CDE	07/26/84	M 2	A DESIGN & DRAFTING	0.1	17 D 3		
- 19	1013		07/23/84		QUOTE FOR VALVES	1.0	13 D) XC	YN O	1035	R2_A	07/26/84	м З	L SCRUBBER	0.5	13 D 3		
•	1013	SEI_VA	07/23/84	M4 R	VERBAL QUOTATION	1.0	15 D	xc	YC 0	1035	DES	07/26/84	M 3	L SCRUBBER E SCRUBBER IN RIG ROOM E SCRUBBER IN RIG ROOM D SCRUBBER D SCRUBBER D SCRUBBER (& GTR-3) T WORK SITUATION T WORK SITUATION O VISIT TO CPE & ADL B MEETING	0.5			rų –
1	1013	SEZ_VA	07/23/84	M4 R	VERBAL QUOTATION	1.0	15 D) XC	YC O	1035	CDD	07/26/84	M 3	F SCRUBBER IN RIG ROOM	0.5	14 D)	(1)	rq -
	1014 0	CDE	07/23/84	W 1 O	PREPARING FOR MTC WITH COD	4 0	17 0	VD	V7 4	1036	DES	07/26/84	M 3	D SCHUBBER	0.5	15 D X	I Y	(Q +
	1015	BPO_S	07/24/84	M 2 O	NEW OFFICES FOR SERVICES DIV	0.1	14 0	XP	0 +	1036	CDĒ	07/26/84	M 3	D SCRUBBER	0.5	14 D X	I I	(Q 0
	1015 0		VI/64/04	M 2 U	NEW URAWING OFFICE PLANNED	0.1	17 D	YP	YE +	1036	CDD	07/26/84	M 3	D SCRUDDER	0.5	17 D X	I I	DG +
	1016 0	UL	07/24/84	T 2 OD	CALL TO SL A			xi		1037	CDF	07/26/94	M 0	D SCRUBBER (& GTR-3)	0.5	15 D X	II	DG +
	1017 1	R2_A	07/24/84	T 2 IL				xc		1037		07/20/04	M 2	T WORK SITUATION	1.0	17 D X	R Y	(н +
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	1018 0	CDE	07/24/84	T 2 OD					YN -					TIDII TO CHE & ADI_K MEETING	0.4	17 D X	S C) ()
	1019 1	າຂອ	N7/24/04	14 E P	THERAPHICA			XS		1038		VI/6I/04	1 2 (O CRE VISIT/ADI R MTG	0.4	17 D X	s c) Õ
	1019 [DR S	07/24/84	M 5 D	INTRO OF COD TO COF			XS		1039		07/31/84	W 1	R MEETINGS ON PROJECT	4.5	17 D X	T Y	P 0
	1019 0	I S	07/24/84	M 5 D	INTRO OF CDD TO CDE			XS		1040	CDE (07/31/84	W 1	E COAL FEED DEMONSTRATION	1.0	17 D X	а т	S 1
	1019 0		07/24/84	M 5 D		0.3	8 D		YI +	1041	UDE (08/01/84	W 1	T PLAN FOR DAY	0.9	17 D X	D V	
	1019 0	חחר	07/24/04	M 5 D	INTRO OF CDD TO CDE INTRO CDD TO CDE INTRO CDD TO CDE INTRO CDD TO CDE INTRODUCTION TO CDD BACKGROUND OF CDD BACKGROUND OF CDD	0.3	17 D	XS	YE +	1042	DR_S (08/01/84	M 4	D MISTAKES & TLUNESS	^ 2	9 D C	n v	
	1020 0	ספי אין אין אין אין אין אין אין אין אין אי	07/24/04		INTRODUCTION TO CDD	0.3	15 D	XS	YI +	1042	GI_S (08/01/84	M 4	D SPELLING MISTAKES & TILNESS	0.3	8 D C		n +
	1020 0		07/24/04	M 2 D	BACKGROUND OF CDD	0.8	17 D	XS	YE +	1042	JDE (08/01/84	M 4	D MISTAKES/ILLNESS	0.5	17 0 0		н +
			07/24/84	M 2 D	BACKGROUND OF CDD	8.0	15 D	XS	YI +	1042	CDD (08/01/84	M 4		0.3	17 D C	DY	н +
	1021 E	<u>_</u> (01/64/04	M4 K	REVIEW OF WHOLE PROJECT	2.0	14 D	XR	YR +	1043	R1 A (08/01/84	W 2	N SCRUBBER/LAYOUT	0.3	15 D C	DY	'Н +
	1021 E	лк_S (07/24/84	M4 R	REVIEW OF WHOLE PROJECT	2.0	9 D		YE +	1043	DE (08/01/84	w 2	A 000000000000000000000000000000000000	1.0	13 D I	DK	
	1021 0	UE (07/24/84	M4 R	REVIEW OF WHOLE PROJECT			XR		1044		08/01/84	w 3	• • • • • • • • • • • • • • • • • • •	1.0	17 D I	DK	S 0
	1021 C	עע:	07/24/84	M4 R	REVIEW OF WHOLE PROJECT		15 D		YR +	1044		08/01/94			1.5	13 D I	DO	GO
	1022 C	,DE (07/24/84	W 1 H	PREPARING FOR AD1-R MEETING	-	17 D		YP +	1044		19/01/04	т.) ш. п.	D RIG LAYOUT & SCRUBBER	1.5	17 D I	DO	G +
	1023 C	<i>.DE</i> (01/23/84	W 1 H	CUBICLE PLAN/FLEVATION			ID '		1045		0/01/04		L RIG & SCRUBBER LAYOUT	1.5	15 D I	DО	G -
	1024 C	DE C	07/25/84	Win								0/01/84	MZ		1.0	17 D X	s v	- I +
	1025 R		07/25/84	τ 2 00			17 D		YP +	1045 (M 2	LUNCH/CRICKET	1.0	15 D X	s v	T O
	1025 C	DE	07/25/84	T 2 TO			13 D		YN +	1046 1	лк_S (18/01/84	W 3	D MISTAKES IN LAYOUT	1.5	9 D C	 D D	D -
	1026 C	DE	07/25/84	IO W 1 11				xc		1046 (DE C)8/01/84 N	W 3	D DR S MISTAKES IN LAVOUT	1.5	17 D C	- ה ה ח	Do
	1027 C		7/26/91	w 1 m			17 D		YN +	1046 (עע:)8/01/84 \	N 3	D DR S MISTAKES IN LAVOUR	1 5		-	
		0			FINAL PREP FOR MEETINGS	0.9	17 D	XR	YP -	1047 5	ILA O)8/01/84 V	√ 3	A HEATING ELEMENTS & MATERIALS	2.2	17 0 1	0 D	D +
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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

1168 CDD 09/05/84 W 2 D YESTERDAY'S FIASCO 0.4 15 D XS YH - 1191 CDE 09/17/84 W 1 T DETAIL DESIGN PROGRESS 0.9 17 D XR 1169 DR_S 09/05/84 M 3 P TEA! (AND YESTERDAY) 0.3 9 D XS YE - 1192 R1_A 09/17/84 M 2 O GREETING ONLY 0.1 13 D XS 1169 CDE 09/05/84 M 3 P TEA! (AND YESTERDAY) 0.3 17 D XS YH + 1192 CDE 09/17/84 M 2 O GREETING ONLY 0.1 17 D XS 1169 CDD 09/05/84 M 3 P TEA (& YESTERDAY) 0.3 15 D XS YH + 1193 CDE 09/17/84 M 2 D INTERFERENCE BY DE_S 0.2 17 D XS 1170 DE_S 09/05/84 M 3 D REVIEW OF PROGRESS 0.8 14 D ID DG - 1193 CDD 09/17/84 M 2 D INTERFERENCE BY DE_S 0.2 15 D XS 1170 CDE 09/05/84 M 3 D EXPLANATION OF STEELWORK 0.8 14 D ID DG - 1193 CDD 09/17/84 M 3 D DAWING NUMBERS 1.0 14 D ID 1171 R1_A 09/05/84 M 3 D EXPLANATION OF STEELWORK 0.8 15 D ID YI - 1194 CDE 09/17/84 M 3 D NUMBERING DWGS 1.0 17 D ID 1172 CDE 09/05/84 M 1 OO MEETING CANCELLED 0.1 13 D XP YI 0 1194 CDE 09/17/84 M 3 D SITUATION REGARDING GI_S 2.0 14 D XS 1173 R1_A 09/05/84 M 2 N GENERAL UPDATE 0.1 13 D XR YR 0 1195 CDE 09/17/84 M 3 D SALARIES & GI_S 2.0 17 D XS	INT/NO PERSO
1174 CDE 09/05/84 M 2 L PROJECT TECHNICAL INFO 0.3 12 N X 0 119 DE_3 09/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 11 D X 0 05/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 11 D X 0 05/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 11 D X 0 05/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 11 D X 0.3 12 D X 0 05/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 11 D X 0.3 12 D X 0 05/17/84 M 2 D PERSONAL SITUATION OF DE_3 0.3 12 D X 0 000 05/17/84 M 2 D PLAN FOR DAY 0.3 11 D X 0.4 0.4 0.3 12 D X 0.4 0.5 11 D X 0.5 11 D X 0.5 11 D X 0.5 11 D X 0.5 0.5 11 D X 0.5 11 D X 0.5 11 D X 0.5 05/17/84 M 2 D POD SIZE AF A M X N FOR DAY 0.5 11 D X 0.5 05/17/84 M 2 D POD SIZE AF A M X N FOR DAY 0.5 11 D X N N 0.5 0.5 0.5 0.5 0.5 0.5 0.5 0.5	1168 CDD 1169 DR_S 1169 CDE 1169 CDE 1170 CDE 1170 CDD 1170 CDD 1171 R1_A 1172 CDE 1173 R1_A 1173 CDE 1174 R2_A 1173 CDE 1174 CDE 1175 SL_A 1176 SL_A 1176 SL_A 1176 CDE 1179 DE_S 1179 DE_S 1179 DR_S 1179 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1180 CDE 1181 CDE 1183 ASL_A 1183 SL_A 1183 SL_A 1183 SL_A 1183 SL_A 1183 CDE 1183 ASL_A 1183 CDE 1183 ASL_A 1183 CDE 1183 CDE 1183 CDE 1183 CDE 1183 CDE 1185 SL_A 1185 CDE 1185 SL_A 1185 SL_A 1185 SL_A 1185 CDE 1185 SL_A 1185 SL_A 1185 CDE 1186 CDE 1187 CDE 1187 CDE 1187 CDE 1187 CDE 1187 CDE 1187 CDE 1187 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE 1189 CDE

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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						-/	.,			1 2110011	DATE	TIPE,	L TOPIC	HRS	£/H P/AC	ттом
1219	CDF	10/16/81	т 2 ос	D.O. & WEEKLY REPORTS												
	AM_S	10/18/84	T 2 10	DETAIL DESIGN PROGRESS	0.5	17	DXR	YN O		G1_S	10/26/84	W 4	D SCRUBBER DRAWINGS	0.5	8 D FD	YH -
1220		10/18/84	T 2 00	DETAIL DESIGN PROGRESS	0.1	19	D XR D XR	YR +	1245		10/26/84	W 4	D SCRUBBER DRAWINGS	0.5	17 0 00	
	DE_S	10/18/84	T 2 OD) CDE REQUESTED UPDATE ON DWGS	3 0.2	14			1245		10/26/84	W 4	D SCRUBBER DWGS/CALCULATIONS	0.5	15 D FD	DD +
1221	CDE	10/18/84	T Z 10	CHE ASKED ABOUT DWGS	0.2	17	D XR	VO O	1246		10/20/04	MJ	D STORIES ABOUT DE_S	0.3	8 D XS	YH +
1222		10/19/84	M 2 0	DESIGN & DRAFTING		19		YN +	1246	CDD	10/26/84	M 3 M 3	D STORIES ABOUT DE S D STORIES ABOUT DE S D CHECKING SCRUBBER DWGS	0.3	17 D XS	ҮН О
1222	CDD	10/19/84	M 2 A	CDD LEAVING R	0.5	15	DXP	YN O	1247	CDE	10/26/84	W 1	D CHECKING SCRUPPER DWGG	0.3	15 D XS	YH +
1223	R1_A	10/22/84	T 2 00	ARRANGE MEETING	0.1	13	DXP	0 0	1248	CDD	10/26/84	wi	D WRITING UP CALCULATIONS	1.1	17 D CD	CD 0
1223	CDE	10/22/84	T 2 1H	CDD LEAVING R ARRANGE MEETING ARRANGE MTG WITH CDE MEETING TIME	0.1	17	D XP	0 -	1249	M_A	10/26/84	M 5	D PROJECT FUNDING	1.0	15 D PD 22 D XC	YRO
1224 1224	SL_A CDF	10/22/84	T 2 00	MEETING TIME	0.1	17	D XP	0 0		DE_S	10/26/84	М 5	D FUNDING FOR GTR	0 2	14 D XC	YN 0
1225		10/22/84	T 2 00	SL_A WANTS MTG 10.30 MEETING TIME				0 -		G1_S	10/26/84	м 5	D FUNDING FOR GTR D FUNDING FOR GTR D FUNDING FOR GTR D CDD EXPERIENCES D PERSONAL EXPERIENCES D PERSONAL EXPERIENCES	0.2	8 D XC	0 0
1225		10/22/84	T 2 14	SECOND MTG AFTERNOON		17 1		0 0	1249	CDE	10/26/84	м 5	D FUNDING FOR GTR	0.2	17 D XC	YQ 0
1226	DES	10/22/84	T 2 OD	CDD 1S LEAVING	0.1	17 1	D XP	0 -	1249	CDD	10/26/84	M 5	D FUNDING FOR GTR	0.2	15 D XC	YNO
1226	CDE	10/22/84	Т 2 1Н	CDD 1S LEAVING	0.2	14 1	D XR		1250	G1_S	10/26/84	М 3	D CDD EXPERIENCES	0.5	8 D XS	YH +
1227	DE_S	10/23/84	T 2 1D	ARRANGED SCHEDULE	0.1	14 1	D XP	Y1 -	1250	CDE	10/26/84	MJ	D PERSONAL EXPERIENCES	0.5	17 D XS	Y1 +
1227	CDE	10/23/84	т 2 он	ARRANGED SCHEDULE	0.1	17 1	XP	Y1 _	1251	DES	10/26/84	M 3	C EDUCATION ETC - LUNCH	0.5	15 D XS	Y1 0
1228	CDE	10/23/84	т 2 он	CALCS & DWGS			FD		1251	CDE	10/26/84	M 3			14 D XS	0 +
1228	CDD	10/23/84	T 2 1D	CALCULATIONS & DRAWINGS			FD		1251	CDD	10/26/84	м 3	C LUNCH - EDUCATION	0.5	17 D XS	Y1 +
1229 1230	CDE	10/23/84	W 1 H	SECONDARY PROJECT	2.0	17 [) ХН	Y1 0	1252	CDE	10/26/84	M 2	C LUNCH - EDUCATION C LUNCH - EDUCATION E JOB EXPERIENCES E JOB EXPERIENCES D READING SUN D READING SUN	0.5	15 D XS 17 D XS	Y1 +
1230		10/24/84	W 1 T	PLAN FOR DAY	0.9	17 [) X P	YL O	1252	CDD	10/26/84	M 2	E JOB EXPERIENCES	0.7	15 D XS	Y1 +
1231	CDF	10/24/84		GREETING ONLY GREETING ONLY	0.1	13 I	XS	Y1 +	1253	DE_S	10/26/84	W 1	D READING SUN	0.5	14 D XS	11 +
▶ 1232	SLA	10/24/84	M 3 R	COAL HYDROGENATION PROJECT	0.1	17 [XS	Y1 +	1254	DE_S	10/26/84	W 1	D READING SUN	2.0		0 +
N 1232	CDE	10/24/84	M 3 R	COAL HYDROGENATION PROJECT	1.8	17 0	XH	Y1 -	1255	CDE	10/20/04	W 1	D CHECKING SCRUBBER DWCS	2.2	17 D CD	CD +
ພ 1233	R1_A	10/24/84	M 5 C	VALVES & COSTS	1.8	17 1	XH XC	Y1 0	1256	CDD	10/26/84	W 1	D WRITING UP CALCULATIONS	2.3	15 D PD	YR +
1233	R2_A	10/24/84	M 5 C	QUOTE FOR VALVES/CONTROLS	2.7	13 1	XC	YN +	1257 1257	M_A CDE	10/26/84	M 2	O A-FORM & FUNDING		22 D XC	YN -
1233	CDE	10/24/84	M 5 C	VALVES & COSTS		17 D		YN +	1258	CDE	10/20/84	M 2 W 1	A A-FORM & FUNDING A A-FORM & FUNDING T PLAN FOR DAY O GREETING ONLY A GREETING ONLY L VALVES COST ESTIMATE L VALVES COST ESTIMATE D GENERAL CHATTER	0.5	17 D XC	YN O
1233	SEI_VA	10/24/84	M 5 C	VALVES & COSTS	2.7	15 0	xč	YN +		ASL_A	10/31/84	M 2	CREETING ONLY	0.3	17 D XP	YL O
1233	SEZ_VA	10/24/84	M 5 C	VALVES & COSTS	2.7	15 D	xc	YN +	1259	CDE	10/31/84	M 2	A GREETING ONLY	0.1	14 D XS	Y1 +
1234 1234		10/24/84		OBTAINED DWGS FOR MEETING	0.1	14 D	XS	Y1 +	1260	R2_A	10/31/84	M 2	L VALVES COST ESTIMATE	0.1	17 D XS 13 D XC	Y1 +
1234		10/24/84 10/24/84	M 4 D	COLLECTED DRAWINGS FOR MTG	0.1	8 D	XS	0 +	1260	CDE	10/31/84	М 2	L VALVES COST ESTIMATE	0.1	17 D XC	YC +
1234		10/24/84	M 4 D	DWGS FOR MEETING COPIES OF DRAWINGS	0.1	17 D	XS		1261	DE_S	10/31/84	M 4	D GENERAL CHATTER	0.5	14 D XS	
1235		10/24/84	M 3 O	VALVE COST ESTIMATE	0.1			Y1 +	1261	DN_3	10/31/04	MI 41	D GENERAL CHATTER	0.5	9 D XS	ΥΠ ∓
1235		10/24/84	M 3 A	VALVE COST ESTIMATE		13 D		YN +	1261	G1_S	10/31/84	M 4	D GENERAL CHATTER	0.5	8 D XS	YH 🔸
1235 (CDE	10/24/84	M 3 A	VALVE COST ESTIMATE	0.5 0.5			YN + YN O	1261 1262		10/31/84	M 4	D GENERAL CHATTER	0.5	17 D XS	Y1 0
1236	DE_S	10/24/84	M 2 D	PAYING SALES ENGRS FOR HELP	0.1			0 -	1262		10/31/84	M 2 4 2	P SECONDARY PROJECT	0.1	17 D XH	YO 🔺
1236 (CDE	10/24/84	M 2 D	PAYMENT OF VALVE COMPANY	0.1			YN O	1263	CDE	10/31/84	M 2 W 1	P SECONDARY PROJECT D CHECKING STEELWORK DWGS	0.1	17 D XH	Y1 0
1237 9	SL_A	10/24/84	M 2 O	TERMINATING PROJECT	A 2	17 0	VD .		1264	DES	10/31/84	M 4	D PHOTOGRAPHY IN D.O.	1.1	17 D CD	CD -
1237 (CDE	10/24/84	M2A	TERMINATING PROJECT	0.3	17 D	XP	YN O	1264	DRS	10/31/84	M 4 1	D PHOTOGRAPHS IN D.O.	0.4	14 D XS	YH +
1238 I 1238 (10/24/84	M 3 D	CDD NOT LEAVING NOW	0.3	14 D	XR Y	YN +	1264	G1_S 1	10/31/84	M 4 1	PHOTOS IN D.O.	0.4 0.4	9 D XS	
1238 0		10/24/84	M 3 D	CDD NOT NOW LEAVING	0.3	17 D	XR Y		1264	CDE	10/31/84	M 4 1	PHOTOGRAPHS IN D.O.	0.4	8 D XS 17 D XS	YH +
1239 5	SL A	10/24/84	M 2 0	CDD NOT LEAVING NOW	0.3	15 D	XR	YN +	1265	DE_S)	10/31/84	M2 (2 PERSONAL BUSINESS OF DE S	0.7	14 D XS	YH +
1239 0	DE	10/24/84	M 2 A	CDD STATING ON	0.1	17 D	XR		1265	CDE)	10/31/84	M2 (LUNCH	0.7	17 D XS	Y1 +
1240 0	CDE	10/24/84	LIOA	CDD STAYING ON	0.1	17 D	XR Y		1266	UE_S)	0/31/84	M 3 I	CDD BACK FROM DENTIST	0.3	14 D XS	Үн ⊾
1241 F	R1_A	0/24/84	N 1 10	CONTRACT DRAFTSMAN	0.2	17 D	XR Y XP Y		1266 1266	נטיב אינט י מסי		M 3 1	CDD BEEN TO DENTIST	0.3	17 D XS	ҮН ⊾
1242 F	₹2_A :	10/24/84	N 1 1L	CONTRACT DRAFTSMAN	0.1	13 D	XP 1 XP 1		1267		0/31/84	M J 1 T 2 00	GREETINGS & STORIES SALESPERSON COMING	0.3	15 D XS	VH L
1243 0	DE 1	0/25/84	W 1 0	CLASSIFYING VALVES	2.0	17 D	XC S	SP 0	1267		0/31/84	r 2 1	SE CONTROLS SALESMAN CONTROL			
1244 0	DE DE	0/26/84	W 1 T	PLAN FOR DAY	0.3	17 D	XP Y	L O	1268		0/31/84	W 1 T	SE CONTROLS SALESMAN COMING CHECKING STEELWORK DWGS	0.1	17 D XI	YN O
1245 D	JE_S)	0/26/84	w 4 D	SCRUBBER DRAWINGS	0.5	14 D	FD C		1269	DE_S 1	0/31/84	W 3 1	CAPILLARY CELL	1.4	17 D CD	CD +
				TERMINATING PROJECT CDD NOT LEAVING NOW CDD NOT LEAVING NOW CDD NOT LEAVING NOW CDD STAYING ON CDD STAYING ON CDD STAYING ON CONTRACT DRAFTSMAN CONTRACT DRAFTSMAN CLASSIFYING VALVES PLAN FOR DAY SCRUBBER DRAWINGS											14 D XH	¥1 +

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			G1	R PROJE	CT INTERCHANGES BY DATE AND NU	MBER					GTR	PROJ	ECT INTERCHANGES BY DATE AND N	UMBER		
IS	NT/NO	PERSON	DATE	TYPE/I			£/H P/AC1		INT/NO PERS			түре,			£/H P/ACT	•
- A 24 -	1271 1271 1272 1272 1273 1274 1275	CDD R1 A R2_A GDL SE SCDA SCDA SCDA SCDA SCDA SCDA SCDA SCDA	10/31/8 10/31/8 10/31/8 10/31/8 10/31/8 10/31/8 10/31/8 10/31/8 11/08/8 11/09/8 11/14/8 11/14/8 11/14/8 11/14/8 11/14/8	$\begin{array}{cccccccccccccccccccccccccccccccccccc$	<pre>0 PHOTO OF GI_S 0 PERSONAL LIFE OF DE_S 0 PERSONAL LIFE OF DE_S 0 LUNCH/ DE_S PRIVATE WORK 0 BLANK SPECIFICATION SHEETS 1 CAPILLARY CELL 1 CAPILLARY CELL SPECIFICATION 1 SPECIFICATION FOR CAP. CELL 1 CAPILLARY CELL SPECIFICATION 1 TIDYING UP CAP. CELL SPEC. 1 WEEKLY REPORTS 1 WEEKLY REPORTS 1 WEEKLY REPORTS & FUNDING 1 WEEKLY REPORTS & FUNDING 1 WEEKLY REPORTS & FUNDING 1 WEEKLY REPORTS & FUNDING 2 WEEKLY REPORTS & FUNDING 2 WEEKLY REPORTS FROM CDR 2 DO. & POOR PROGRESS 2 PLAN FOR DAY 2 WEEKLY REPORTS 3 WEEKLY REPORTS 4 WEEKLY REPORTS 5 PLAN FOR DAY 2 WEEKLY REPORTS 4 WEEKLY REPORTS 5 CAPILLARY CELL 5 CAPILLARY CELL 5 CAPILLARY CELL GASKETS 5 CHECKING STEELWORK DWGS 5 PAHL & BEITZ METHOD 5 PAHL & BEITZ METHOD 5 PROJECT PROGRESS 5 DWGS & FUNDING 5 PANDA 5 WEEKLY REPORTS 5 CAPILLARY CELL 5 CHECKING STEELWORK DWGS 5 PAHL & BEITZ METHOD 5 PAHL & BEITZ METHOD 5 PAHL & BEITZ METHOD 5 PANL & FUNDING 5 PANDA 5 PA</pre>	0.34450244400011555055588821223003933122208855	17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XS 17 D XS 17 D XS 17 D XS 17 D XS 17 D XS 17 D XS 17 D XS 17 D XS 17 D XH 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR 17 D XR <td< td=""><td>YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YI + YI + YI + YQ + YQ + YH + YH + YH + YH + YH + YH + YH + YH + YH + YH + YH + YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YR 0 YH <td< td=""><td>1298 DE_S 1298 CDE 1298 CDE 1298 CDE 1298 CDE 1299 CDE 1300 CDE 1300 CDE 1301 CDE 1302 CDE 1303 CDE 1303 CDE 1304 CDR 1304 CDR 1304 CDR 1304 CDR 1304 CDE 1304 CDE 1305 CDE 1306 AM_A 1307 ADI_ 1307 CDE 1308 AD2_ 1308 CDE 1310 CDE 1310 CDE 1311 ASL_ 1311 R1_A 1311 CDE 1312 CDE 1313 CDE 1314 AM_A 1315 CDE 1316 AM_S 1316 CDE 1317 CDD 1318 CDE 1319 CDE 1319 CDE 1320 R1_A 1320 CDE 1321 CDE 1321 CDE 1321 CDE 1323 AM_S 1323 CDE</td><td>5 1 1 1 1 1 1 1 1 1 1 1 1 1 1</td><td>11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/21/84 11/28/84</td><td>M M 4 4 4 1 1 1 2 2 2 2 1 1 1 3 3 3 2 2 1 1 1 2 2 2 2</td><td>D GENERAL TOPICS D GENERAL CHAT D GENERAL CHAT D GENERAL CHAT D GENERAL CHAT D GENERAL CHAT O PROJECT STATUS A PROJECT STATUS COAL PERM RIG SPEC O REPORT GTR-5 T PLAN FOR DAY O COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY RIG A COAL PERMEABILITY DESIGN D PAHL & BEITZ / DESIGN D PAHL & BEITZ / DESIGN D PAHL & BEITZ / DESIGN A PROJECT UPDATE IO UPDATE P GREETING IN CORRIDOR P GREETING IN CORRIDOR B PROJECT/DRWG. 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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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GTR PROJECT INTERCHANGES BY DATE AND NUMBER

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APPENDIX A.2

GASIFIER TEST RIG PROJECT - CASE HISTORY

A.2.1 BACKGROUND

<u>Task</u>

Of the projects available at the time, the one which best fulfilled the research requirements happened to involve the design of test equipment in one research division of a large corporation. It was not considered an ideal setting for the participant observation field study, as it would not result in a product for sale in a competitive market, but it did have the following features which were considered to be important advantages:

(i) A relatively complex and 'ill-defined' engineering design problem;

(ii) A design team involving different groups and levels in the Company;(iii) A project schedule which closely matched that of the research;

(iv) A willingness on the part of the Company to support the research. The task was to design, then to construct and commission, a high-pressure high-temperature materials test rig. Although the main needs for the rig had been identified, it was seen as having several possible uses and the requirements were thus 'ill-defined'. No design specification existed. The research staff had previously been discussing how to improve the effectiveness of in-house equipment design work (confidential report) and were keen to try a new approach. A problem in the past, for example, had been in the communications between research staff (who specify and use the equipment) and the service section staff (who design and construct it). A series of rigs had been constructed and operated by the same project team, so that this project was seen as another in a progressing sequence, but as this rig would involve the difficult problem of handling flowing coal at temperature and pressure the design task was considered to be high in 'novelty'. It was also considered to be high in 'complexity', as the rig would necessarily consist of a central 'reactor' together with a series of sub-systems including: an electronic control system; a pressurized coal feed system; a gas feed system; a gas scrubber; a tar separator; and a solids-removal system. Approval times at each phase in the design process were anticipated to be lengthy, allowing more time for the field research.

Team

The core project team initially included two Managers; one Section Leader; two Research Scientists; one Design Engineer; and the participant observer as a Contract Design Engineer. As was normal practice on such projects no person was assigned to it full-time; everyone had other responsibilities, including the contract design engineer. It was agreed at the beginning that the project team should be flexible and that specialist help would be called on as required. In particular, a control system design engineer would be needed during the Embodiment Design phase, and a detail designer during the Detail Design phase. Although everyone in the team had been involved with previous similar projects this one was larger and more complex than others designed 'in-house'. It was felt that the project could perhaps serve as a 'model' for future projects.

Procedure

One thing stressed by the project team during initial meetings was that they had no structured approach to the design of special purpose equipment and were keen to develop one. The interest was in an integrated procedure rather than in merely the application of certain techniques. This fitted in with the objectives of the field research, as a more structured design approach would provide a framework for gathering and analysing the data. Several possibilities were considered and the German approach of Pahl and Beitz (B47), which was being translated into English at the time [Wallace (B68 and B48)], was chosen for the following reasons:

- (i) The procedures are described in sufficient detail for direct use by team members unfamiliar with the use of design procedures.
- (ii) Work follows a clearly defined course and the procedural steps could be used for categorizing and analysing the field research data.

A decision was taken to structure the project according to the Pahl and Beitz approach, hold to it as closely as appropriate, but not be confined solely to its use. Techniques drawn from other sources would be applied where appropriate.

Participant Observer

The project team's interest was in the test rig, not in the research, but there was willingness to allow the collection of observational data by the researcher, subject to the Company's usual confidentiality agreement and mutual understanding on personal issues. Credibility of the researcher as a design engineer from the Company's viewpoint had developed from a visit by a research scientist to Chicago (U.S.A.) two years previously, where he had seen a number of high-pressure high-temperature materials test systems in operation [for example see Hales, Bhattacharyya, and Lamoureux (A17)]. It was this visit which later prompted the offer of a project with full research funding, and which enabled problems associated with participant observation to be readily overcome. Although the participant observer lacked experience in field research there were compensating advantages:

- (i) Ten years professional engineering design experience;
- (ii) Management experience on design of similar equipment;
- (iii) Familiarity with coal gasification terminology and problems;
- (iv) Previous contact with project sponsor.

<u>Field</u> Data

Detailed notes were made on all aspects of the project. A working routine was quickly established involving a minimum of one visit a week to the Company, with weekly reports covering progress on both the project and the research (See Appendix A.3). Full project progress reports (Appendix A.3) were submitted every six months (with copies of the weekly reports in the appendices). This set of 6 reports provided a compact and fully detailed record of the 116 weeks of the design project, together with the research. Before each visit to the Company a work plan for the day was written, then what actually happened was recorded as it happened and more detailed notes were written after the day's work. Personal design work was done in a hard-bound notebook while observational field notes were recorded in an identical notebook alongside. 76 hours of audio tape-recordings were made (specific events and typical design work sessions), and a total of 1180 pages of field notes were accumulated. When the project started there was little guidance on what to record and what to omit. It was decided to record as much as possible and from as many viewpoints as possible, making sure that for each event or 'interchange' (Appendix C) the date, topic, time and place was noted.

A.2.2 PROJECT SUMMARY

Initial Proposal

On 18 May 1982 a project proposal was submitted to the Company, outlining the design approach together with a cost estimate for the combined design and research work. The project plan covered the three-year period from October 1982 to October 1985. This proposal was accepted on 2 August 1982 subject to the following conditions:

- (i) No guarantee that management approvals could be timed as shown on the provisional plan.
- (ii) No guarantee that construction would be approved in time for completion to the provisional plan.

(iii) No guarantee of dedicated technician support for construction.

A contract was drawn up, and the design effort started on 1 October 1982.

Project Brief

- (i) To provide the Company with a permanent high pressure test facility primarily capable of simulating particular slagging coal gasifier environments on a laboratory scale, but readily adaptable to other types of test programme in the future.
- (ii) To commission the equipment and initiate long-term materials tests under specified high pressure, high temperature conditions, subject to funding approval.
- (iii) To improve the 'in-house' design approach for special-purpose test equipment by introduction of more formal design procedures.

Design Task

- (i) Design a high pressure test rig system to meet the project brief.
- (ii) Introduce and follow the design steps summarized in Appendix D.3.
- (iii) Follow the schedule through detail design then through construction and commissioning subject to funding approval.

Clarification of the Task (See Appendix A.3, Report GTR-1)

A simple project organization was set up as shown in Figure A-1 (Figures follow the text) and this provided a flexible working structure which was adequate for all phases of the project. The Pahl and Beitz questioning checklist was used to help formulate the technical design problem, and a list of 'Demands and Wishes' from those associated with the project was used to compile the design specification for the rig. This twenty-page document comprehensively covered the test rig design, construction and

- A 29 -

operation. It provided requirements and criteria for the selection and evaluation of conceptual solutions to the design problem. Three copies of the specification were circulated for review and modification by a set date. Against each of the 308 specified requirements the contributor's name was recorded, together with the date of any changes made, as shown on the sample sheet in Figure A-2. At a project meeting on 13 January 1983, three months into the project and on schedule, each item was reviewed and the design specification finalized.

There were two changes made at a later date:

(i) The design pressure was increased from 100 Bar (1500 psig) to 170 Bar (2500 psig).

(ii) The design temperature was increased from 1100°C to 1300°C. The final design and operating conditions are listed below:

Design Pressure : 170 Bar (2500 psig) max. Initial Working Range : 23-85 Bar (350-1250 psig)

0 0		23-05 Dat (550-1250 psig)						
Design Temperature	:	1300 [°] C max.						
Nominal Operating Range	500-1050 [°] C							
Design Life	:	10 years						
Test Time per Run	:	1000 hours continuous						
Equipment Operation	:	7 days/week						
Automatic Control	:	24 hours/day						
Safety Levels	:	Warning; Alarm; Shutdown						
Solids Feedrate	:	l Kg/hour approx.						
Gas Flowrate	:	60 SCF/hour approx.						
Gas Flowrate	•	ou sur/nour approx.						

Conceptual Design (See Appendix A.3, Report GTR-2)

The overall function of the test rig was diagrammatically represented and broken down by sub-function as shown in Figure A-3, then further by subsub-function as recommended by Pahl and Beitz. This was done by the participant observer, in conjunction with others on certain of the subfunctions. Most of the sub-systems could be designed using equipment that was commercially available, but the reactor vessel assembly had to be custom designed. Five intuitive concepts evolved for this, two of which are shown in Figure A-4 and the others in Appendix A.3, but at the same time the Pahl and Beitz method for generating solutions then selecting and combining them was applied. A series of 8 matrices gave a large number of

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possible solutions which were reduced by systematic selection and combination to the four final matrices shown in Figure A-5. Selection charts as shown in Figure A-6 were used to decide on the most appropriate solutions, leaving three viable concepts. These matched three of the five intuitive concepts. By general agreement the best features of each were combined into a single practicable reactor concept as shown in Figure A-7. Its modular nature was considered to be important as this would allow various internal configurations to be tried, if necessary, without any changes to the pressure vessel or its control systems.

Budget price quotations for the reactor vessel, its internal components and the coal feed system were obtained for a first cost estimate which was compiled on standard sheets as shown in Figure A-8. This was itemized by sub-system and the total including reserves according to confidence level amounted to £102,505.00, excluding site assembly and commissioning. The final concept and cost estimate was presented to the project manager on 25 April 1983, just over 6 months into the project and close to schedule. A draft application for construction approval was then submitted.

Embodiment Design (See Appendix A.3, Reports GTR-3 and GTR-5) Up to 3 June 1983 the project had progressed close to the agreed schedule, but three obstacles then arose:

- (i) Participant observer was hospitalized with a serious illness;
- (ii) First-year research report and examination (participant observer):
- (iii) A cost justification was required for the construction phase of the

project and the draft application for approval needed many changes. The first two of these curtailed the participant observer's input to the project for more than a month, and the application for project approval was not processed during this time as a debate had arisen in the Company over the perceived value of the materials test programme itself. This was a matter to be resolved by research scientists, managers and directors in various parts of the Company, rather than by the design team. Finally a revised application was drafted by the contract design engineer with input from research staff and this was submitted to the project management on 2 August 1983. The problems during these three months considerably delayed the embodiment design work. Once the application for project approval had been resubmitted, work was concentrated on design of the reactor assembly. The concept was reviewed and then developed based on comments received; preliminary calculations for the pressure vessel and gas kinetics were carried out, and each sub-system was examined with reference to the Pahl and Beitz checklist for embodiment design. Careful note was taken of the recommended guidelines for 'clarity', 'simplicity' and 'safety'.

A schematic of the proposed test rig system is shown in Figure A-9 and the system is briefly described below:

A purpose-built dense phase conveying system (A) feeds fine-graded coal to lock hopper (B) from which it is augered, under dry nitrogen conditions, into the top of reactor vessel (C). The coal passes through the reaction chamber and is removed by a second auger at the bottom. Discharged solids pass into water-filled holding vessel (D) and are periodically removed through double-valve system (E). A hot mixture of gases and steam is fed in at the bottom of the reaction chamber to produce the gas composition required at the level of the specimens in the coal bed. After separation from the vapourised tars within the chamber, the gas exits at the top of the vessel. Then, after a second stage tar removal, the gases are passed to the scrubbing system (F) before exhausting safely to atmosphere, or are recirculated through gas filter (G) to mixing vessel (H), depending on the operating conditions. Fresh gases are continuously metered into mixing vessel (H) and the resultant composition is monitored by gas chromatograph (I). The gas mixture is pressurized by Haskel pump (J) in a buffer vessel from which it passes to a heating coil within the reactor vessel. Water (with ammonia) is also pumped through a heating coil within the vessel, to provide the required steam component. Control system (K) monitors certain parameters according to set points, making automatic adjustments. Manual monitoring is avoided under normal conditions, apart from daily checks. Each sub-system is essentially a stand-alone unit which "plugs-in" to the reactor vessel, providing a versatile system with possibilities for using the same units in various different configurations. The complete system is arranged to suit a standard cubicle (3 m x 6 m floor area) within a new test rig facility building.

The developed reactor assembly concept is shown in Figure A-10, and the following is a brief description of the main features:

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Overall height of the assembly is 2 metres with a weight of over 5 tonnes. The double-studded, trunnion-mounted pressure vessel (F), with Grayloc (or equivalent) closures, is pressurised with nitrogen and packed with fibrous insulation (H). Internal reaction chamber (G), welded to the intermediate cap (C), contains both the coal bed, forced slowly downwards according to the removal rate set by the speed of auger (L), and the hot gas mixture, fed in through nozzles (K) to pass upwards through the coal. The internal diameter of reaction chamber (G) is 127mm (5 inches). A pressure balance is maintained across this reaction chamber wall, with automatic control of the differential. Heating is by four sets of independently-controlled electrical heating elements (I), which not only maintain the correct coal temperature at the level of test specimens (J) but also heat the incoming gases and control the tar vapour temperature. Test specimens (J) are interlocked to the hollow, central driveshaft, which itself forms part of the removeable cartridge mounted on vessel flange (A). The specimen shaft also drives a replaceable stirrer in the lower coal bed, and the contrarotating auger may be driven either by means of a central shaft from above as shown in the figure, or else by means of an independent shaft and drive from below. Drive from above allows easy maintenance but complicates the cartridge; drive from below requires a novel shaft seal and complicates maintenance but allows more complete instrumentation on the specimens. Coal is intermittently augered into the top of the reaction chamber under dry nitrogen conditions, while annular piston (B) is held in its upper position as shown. As the coal bed moves downwards piston (B) descends, exerting a predetermined load on the coal bed, and on reaching the end of its stroke it is retracted upwards to allow more coal to be fed in.

An important added feature in the developed concept is cylindrical shield (D) which forms an annular reservoir at its lower end, and a vapour space above in which strings of corrosion test coupons (E) may be hung. By use of external valving the pressure in this region is depressed, causing gas and tar vapour to be drawn up. A water-cooled coil around shield (D) then condenses the heavier tars, which trickle down the shield into the warmer annular reservoir so that they may be periodically drawn off as a liquid through a heated dip tube. Likewise gases are drawn off through a heated tube from the top of the vapour space. By monitoring the products exiting through the two tubes, and adjusting the temperature of the top furnace element zone accordingly, a suitable operating balance may be maintained for removal of liquids and gases.

Safety was of prime importance. The developed concept allows easy access to the vessel for maintenance, which enhances safety, and has inherently stable operating characteristics. There is no internal combustion, and all heated components are contained within a cold wall pressure vessel. Full pressure and temperature safety controls are incorporated.

At this stage two formal project presentations were made; the first was to Senior Management on 21 December 1983, and the second was to project staff and any other people interested, on 9 February 1984. Considerable debate followed the presentations and in summary the issues could be divided into two groups. Firstly, there were doubts as to how easily the rig could be made to work, and secondly were questions as to whether the cost of such a rig was justifiable for the proposed materials testing programme. Doubts raised about the operability of the rig were of a detail design nature but the cost issues were more fundamental, involving different opinions as to what materials research data would be needed for the future and how best to obtain it. The management decision on whether to continue or terminate the project was not easy, with strong external influences (from management outside the research division) against continuation, balanced by a project team pressing for continuation. Company policy and politics entered the debate and in the end no definite decision was made except that the detail design work should continue. The application for construction approval prepared in 1983 was never fully processed but authorization was given for design of the control system and possibly a hazard analysis to be carried out. Work proceeded within these constraints, but with a certain loss in momentum at all levels. A formal job number was assigned to the project within a group of other projects.

It became evident to the research staff, from the comments made, that the test rig would have wider applicability if both the design temperature and pressure were higher, so on 7 March 1983 the Section Leader increased the design pressure from 100 Bar (1500 psig) to 170 Bar (2500 psig) maximum and the design temperature from 1100° C to 1300° C. It was realized that

the design problems and the cost of equipment such as valves and pressure vessels would be greatly increased by this, but the researchers considered it worthwhile if justification for construction of the test rig could be enhanced. No other design specification changes were made. The plan was for work to continue at the Company, with the contract design engineer concentrating on the reactor vessel design, and a contract (or staff) detail designer recruited for detailing the ancillary equipment. Help from the suppliers would be sought in designing equipment such as the coal supply system, and the control system would be done under contract by a qualified specialist. It was agreed in February that if a detail designer could be recruited promptly, the manufacturing drawings could be completed by the end of August 1983, even though the work would have to take low priority in the design office until such time as the project was approved for construction. A schedule was drawn up as a general guide but it was understood that without formal project approval this could not be binding. Control System Design (See Appendix A.3, Report GTR-4)

Conceptual and embodiment design of the control system was undertaken as a separate task, in parallel with other detail design work. A contract was negotiated with the engineer who designed the control system for the highpressure equipment described by Bhattacharyya, Hales and Lamoureux (A17) and arrangements were made for him to work for three weeks on the task. This was planned as an intensive work period, with one week of preparation in Chicago followed by two weeks of work in Britain as shown in Figure A-11. The contract design engineer and controls engineer planned to work closely together, calling in specialist and user help where needed, and the approach was regarded as an experiment from several viewpoints:

- o Researcher observing a rapid 'project-within-a-project';
- o Company tailoring the team and the approach to the task;
- o Controls Engineer working in a different country and culture;
- o Chicago Company employee gaining experience in another country;

• Project Team - working with an experienced controls engineer. The design task requirements and an information package were prepared by the contract design engineer and airmailed to Chicago on 16 April 1984. Controls were needed to monitor the test rig system in operation, record data for off-line analysis and safely maintain the required temperatures, pressures and flowrates. Response to out-of-limit conditions was required on three levels, with audio alarms, visual alarms, controlled shutdown modes and an emergency shutdown mode. To facilitate changes in test rig function at low cost, a modular and expandable control system was needed.

As shown in Figure A-12 a programmable controller operates solenoid valves and motors according to sensor inputs, initiates and supervises controlled shutdowns, monitors the controls and powers panel displays. Temperatures, reactor pressure differential and gas mixing are maintained by independant controllers. Each of the modular control cabinet panels, shown assembled in Figure A-13, was detailed together with the sensor function and process data charts needed for a hazard analysis (for samples see Appendix A.3). The work was completed to cost and schedule, with considerable involvement of Company staff during the middle week to ensure that the controls would match user requirements. A valve manufacturing company also provided expertise, their sales engineers checking requirements for each of the 150 valves and other items, as the Process and Instrumentation (P & I) diagram was finalized (too large for inclusion in this Appendix). On the last day of the three-week period (25 May, 1986) a 2-hour design review meeting was held at the Company, attended by the management staff, research staff, services staff and a safety officer. Report GTR-4, intended for use as a control system design specification, was issued, discussed and approved.

Detail Design (See Appendix A.3, Reports GTR-5 and GTR-6)

Although the control system design work had been completed according to plan, the detail design work on other sub-systems was severely hampered by lack of a detail designer. Response to the Company's advertisements was poor and it took until 23 July 1984 for a suitable person to be recruited. By then the following work had been carried out (for sample calulations, diagrams and meeting minutes, see Appendix A.3):

(i) Dense-phase coal feeding system layout and pricing completed;

(ii) Gas system schematic prepared;

(iii) Gas, tar and solids removal systems developed (see Figure A-14);

(iv) Control system specified, ready for detailed bids;

(v) Pressure vessel calculations completed according to BS5500;

(vi) Reactor vessel detail drawings partially completed;

(vii) Safety and quality assurance issues resolved;

(viii) Agreement negotiated on cubicle space and general system layout;

(ix) Preliminary test rig layout completed;

(x) Comprehensive set of product information accumulated and filed;

(xi) Review of the prevailing design and draughting practice completed; (xii) Meetings held at manager and director level regarding the review. As no management decision had been taken regarding test rig construction, the project's priority rating remained low even after the contract detail designer had started work on the detail drawings. The original project schedule and the plan for detail design both had to be abandoned, and for the remainder of the project the progress was contingent on other demands. By 31 December 1984, the following further work had been completed:

(i) Detail drawings and calculations for scrubber (see Figure A-15);

(ii) Detail drawings and calculations for reactor vessel support-frame;

(iii) Detail drawings and calculations for the working platform;

(iv) Crane runway details (partially completed);

(v) Materials selected for inner reactor chamber (see Figure A-16);

(vi) Scale layout of complete test rig system as shown in Figure A-17;

(vii) Product information files transferred to the Company;

(viii) 'Task-team' approach planned for construction and commissioning;

(ix) Design assistance provided on four other Company projects.

Early in 1985 a Company decision was taken to postpone construction of the test rig, confirmed by letter dated 4 March 1985. This decision stemmed from a change in overall Company research priorities, which had reduced research effort and funding in areas relevant to the use of the test rig. The project team had been aware that an imminent Company policy change had been a factor in the management indecision over the future of the project during the previous year, and steps had been taken so that the project could be wound up with the detail design sufficiently completed for easy re-activation at a later date. This was one reason why such emphasis had been put on detailed recording of the design work in the project reports. The winding up of the project included the following work:

(i) Completion of Report GTR-6;

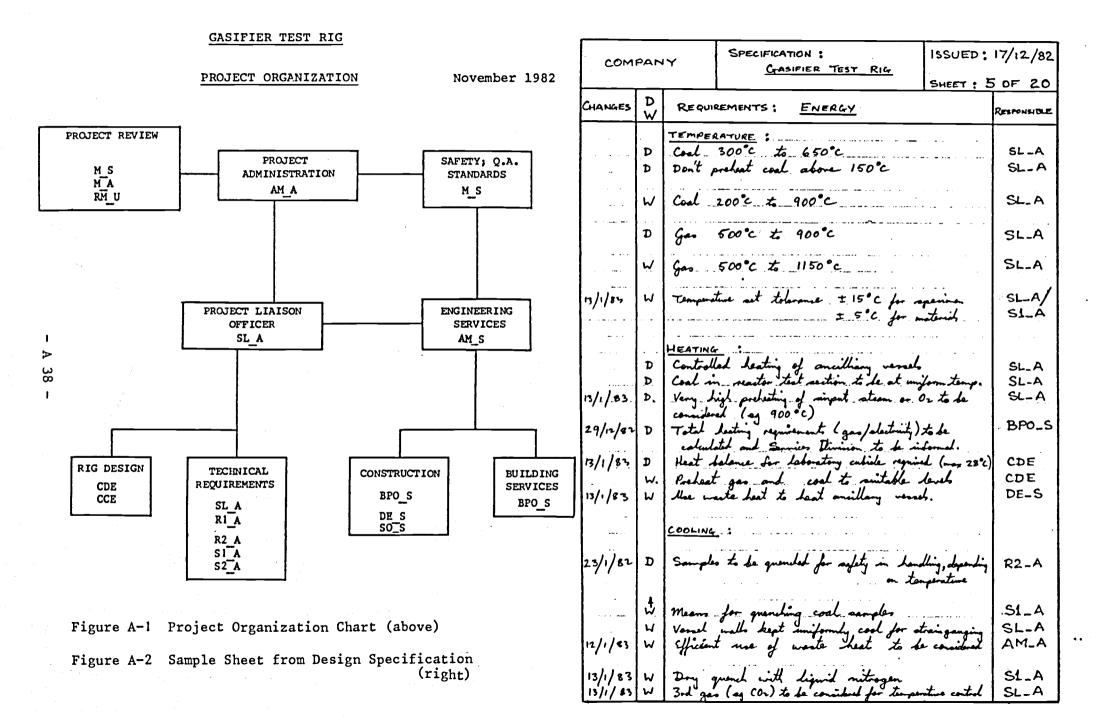
(ii) Correction of faults on completed detail drawings;

(iii) Completion of certain further detail drawings;

(iv) Sketches for the solids collection and tar removal system;

(v) Arranging storage responsibilities for the project records.

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GASIFIER TEST RIG

SUB - FUNCTIONS

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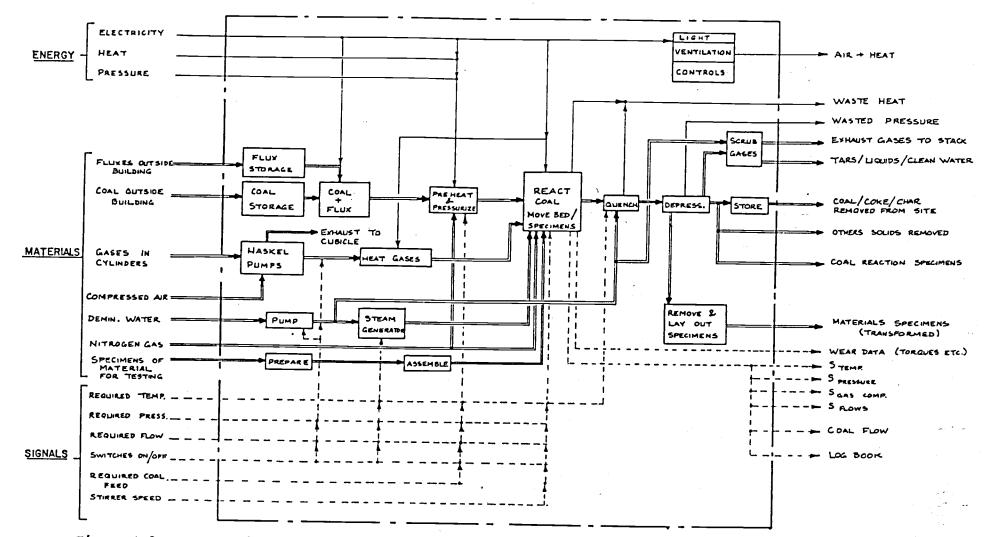


Figure A-3 Sub-Functions for Gasifier Test Rig System

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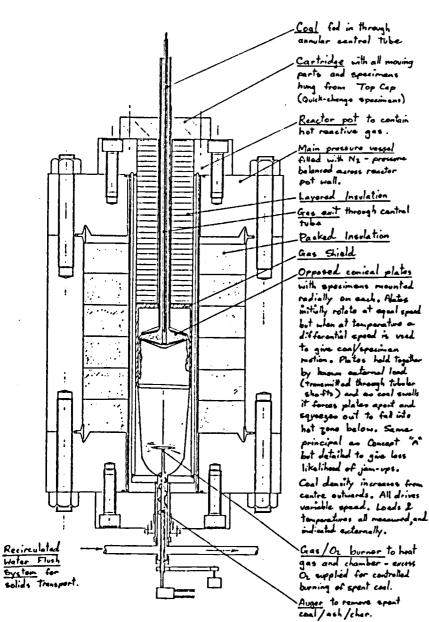
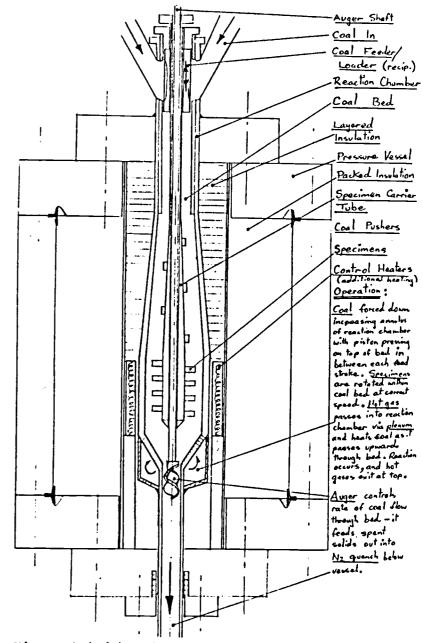
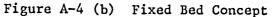


Figure A-4 (a) Centrifugal Concept





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2.	RAM (REGP. VALVE)			COLAT PARTICLES	
3.	METERING ROTARY VALVE				
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3.		BURN ON IN COAL (PASS GAS BURR)				

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Figure A-5

Four Final Combined Matrices

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Figure A-6

Sample Concept Selection Chart

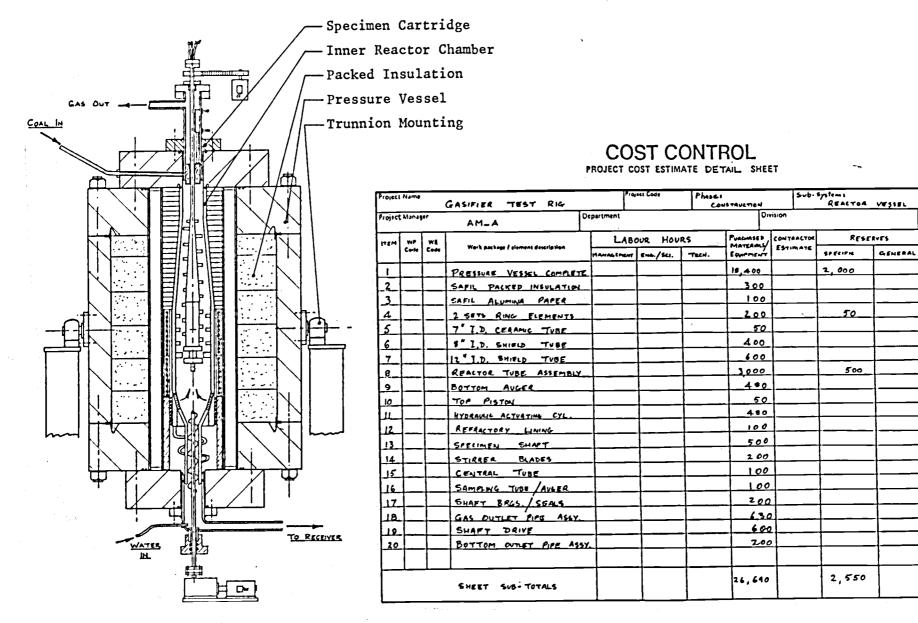


Figure A-7 Final Reactor Concept

Figure A-8 Sample Cost Estimate Sheet

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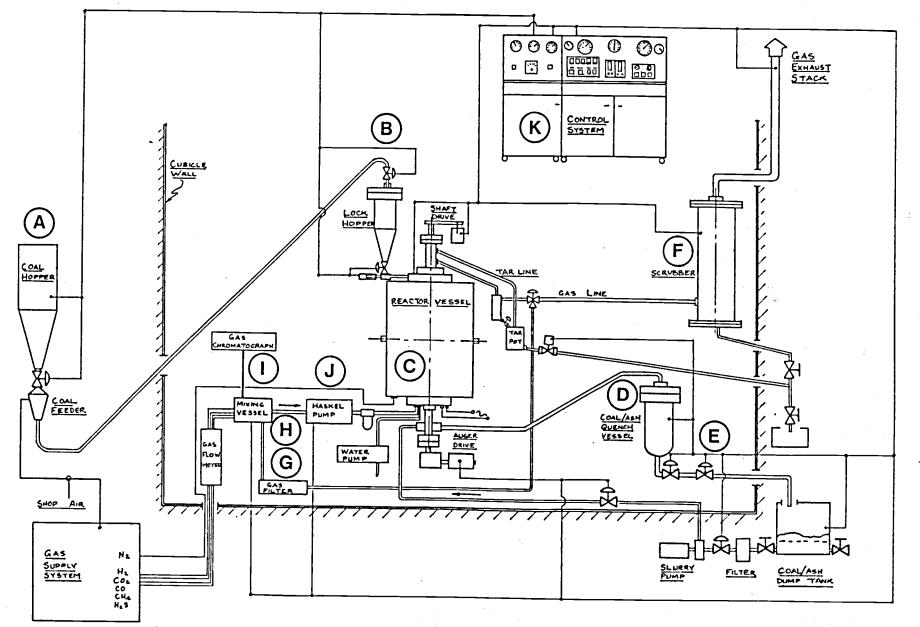


Figure A-9 Gasifier Test Rig System Schematic

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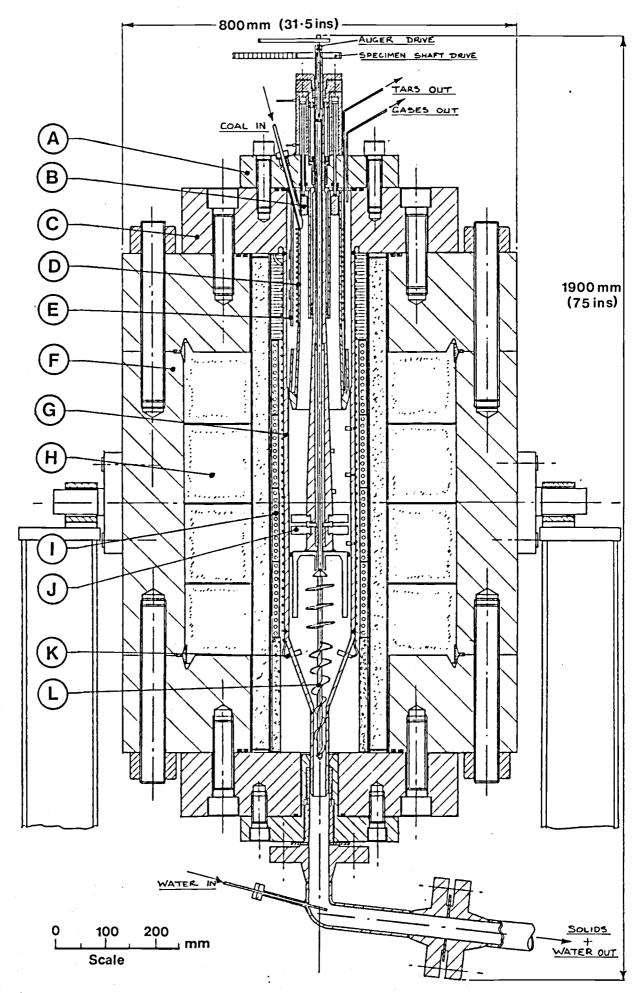
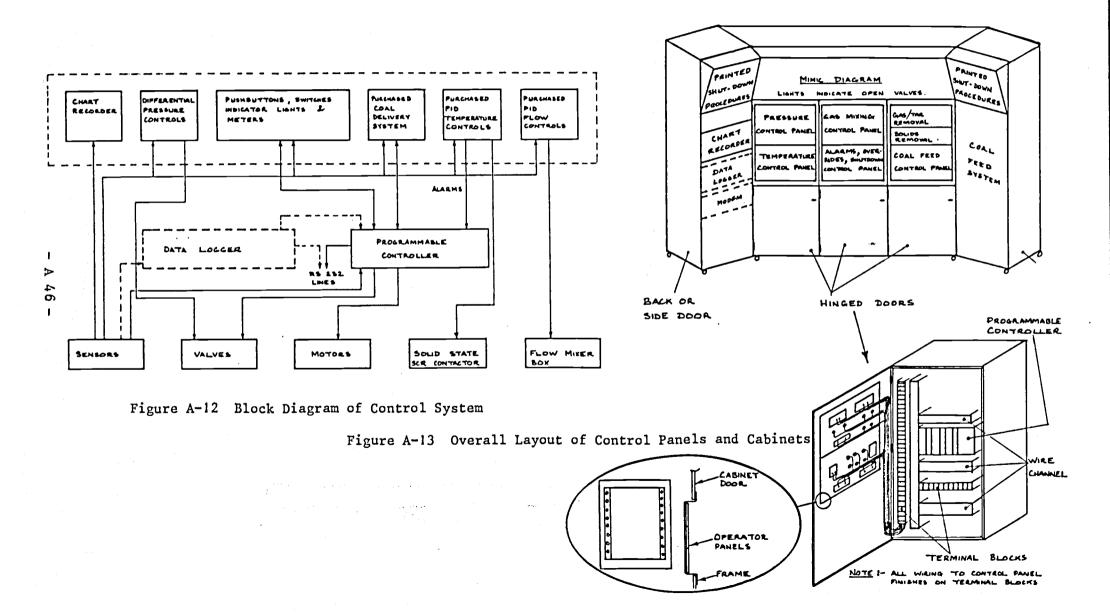


Figure A-10 Developed Reactor Concept

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Figure A-11 Schedule for Design of Control System

- A 45 -



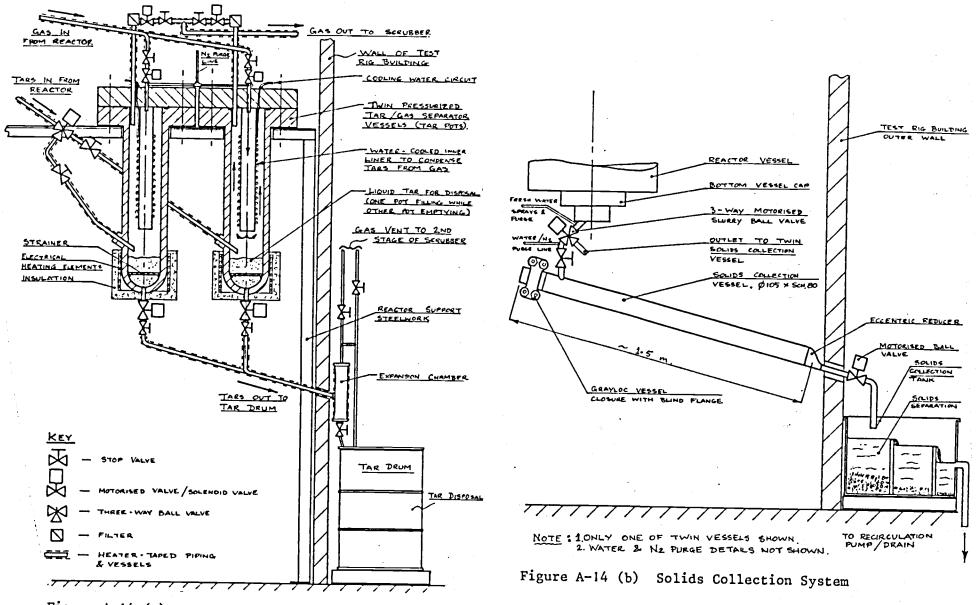
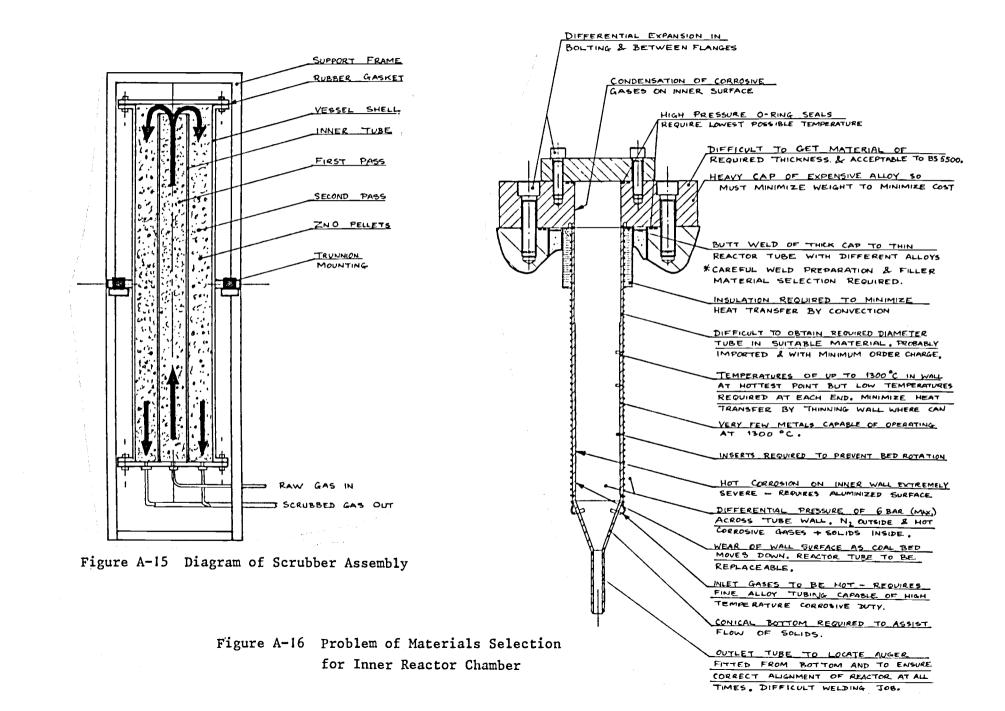


Figure A-14 (a) Tar Removal System

A 47 .



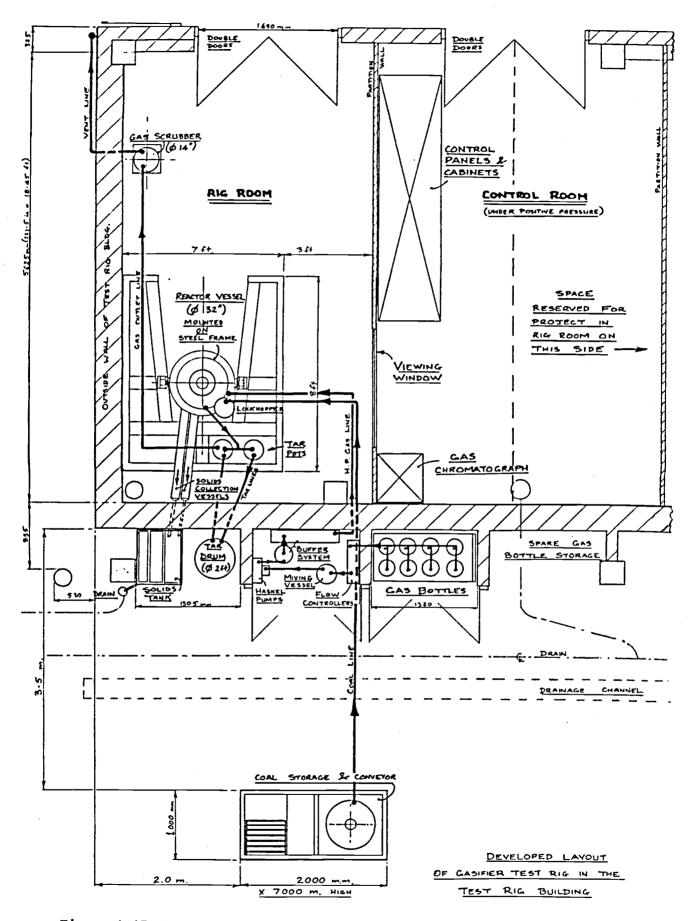


Figure A-17 Layout of Test Rig System

- A 49 -

APPENDIX A.3

GASIFIER TEST RIG PROJECT - DESIGN REPORTS

The following reports were prepared for the Company to provide a detailed record of the complete project effort:

- GTR 1 CLARIFICATION OF TASK
- GTR 2 CONCEPTUAL DESIGN
- GTR 3 EMBODIMENT DESIGN I
- GTR 4 CONTROL SYSTEM DESIGN
- GTR 5 EMBODIMENT DESIGN II
- GTR 6 DETAIL DESIGN

As these were issued as reports within the Company, and are available for reference in the Company library, they are not reproduced here. However the summary and list of contents from each one, together with selected samples of weekly reports, correspondence and calculations, have been included in this section to indicate what further information is available regarding the project. Some additional diagrams and schedules which were referred to in the thesis are also included.

GASIFIER TEST RIG

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Prepared by: C. Hales University Engineering Department Trumpington Street Cambridge CB2 1PZ

December 1982

CONTENTS

- 1. INTRODUCTION
- 2. APPROACH TO DESIGN
- 3. CLARIFICATION OF THE TASK
- 4. TEST RIG SPECIFICATION
- 5. PROJECT ORGANISATION
- 6. PROJECT SCHEDULE
- 7. COST CONTROL
- 8. PROJECT PROGRESS
- 9. MISCELLANEOUS ITEMS
- CONCLUSIONS
- 11. REFERENCES

APPENDIX

- A. PROJECT MAILING LIST
- B. BRAINSTORM IDEA LISTINGS (Sample)
- C. LISTING OF DEMANDS & WISHES (Sample)
- D. SPECIFICATION
- E. TEST FACILITY PLAN
- F. WEEKLY REPORTS
- G. COST CONTROL FORM EXHIBITS

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Figure

- 1. The Design Process
- 2. Project Organisation Chart
- 3. Project Schedule
- Summary Cost Estimate Sheet
- Detail Cost Estimate Sheet
- 6. Conceptual Design Phase
- 7. Function Structure

1550ED: 17/12/82

SUMMARY

Early in 1982, a proposal was put forward for the design and construction of a high-pressure test rig at **matters**, in conjunction with research at Cambridge University into effective use of engineering design methods. The proposal was accepted during August, 1982, and the project started on October 1.

This report covers the first three months' work during which the following progress was made:

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- Initial discussions to clarify the task and define the problem
- Project organisation and overall schedule developed and accepted
- Discussions held on different aspects of the project with 9 members from various divisions
- A double brainstorm session held to develop ideas on design and operational aspects of the test rig
- General listing of "demands and wishes" for the test rig evolved, from which a comprehensive specification has been drafted
- Cost control procedures for such a project considered
- Pahl and Beitz design method used effectively on the preliminary design work.

There has been excellent cooperation from **training** staff from all divisions, and this has enabled good progress to be made, keeping the project on schedule.

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* Change or addition.

SUMMARY

Report No. GTR 2

GASIFIER TEST RIG

Prepared by: C. Hales University Engineering Department Trumpington Street Cambridge CB2 1P2

June 1983

In October 1982, the design of a high-pressure test rig was initiated at THE COMPANY , in conjunction with research at Cambridge on application of engineering design methods. The formal design methods developed in Germany and detailed by Professors Pahl and Beitz (1) have been directly applied to the specification and conceptual phases of the test rig design with considerable success. The project is now ready to move into the embodiment and detail design phases, after A-Form project approval within British Gas.

This report, which leads on from report GTR 1 (2), covers the six months from December 1982 through June 1983, during which the following progress was made:

- Final specification for test rig completed and approved
- Overall function structure (inputs/outputs) developed from specification
- Functional relationships and nature of coal/specimen interface analysed
- Preliminary reactor concepts devised and discussed
- Detailed function structure procedure of Pahl and Beitz followed through, producing 1.29×10^9 possible arrangements for the reactor design
- Solutions systematically eliminated until one single, refined concept remained, based on Pahl and Beitz selection criteria
- Preliminary overall system design developed, and budget cost estimate obtained from suppliers for major subsystems
- Hardware budget cost estimate of £85,500 calculated for the complete test rig using cost control sheets as described in report GTR 1
- A-Form and cost justification completed and submitted to the Company for formal project approval
- Concepts and cost estimate presented to staff at the Company for discussion and suggestions.

Cooperation from staff at — has continued to be excellent, and with formal submission of the A-form the gasifier test rig project is now at a suitable stage for involvement of specialists within other sectors of the Company.

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CONTENTS

- 1. INTRODUCTION
- 2. TEST RIG SPECIFICATION
- 3. FUNCTION STRUCTURE FOR RIG
- 4. REACTOR CONCEPTS
- 5. SELECTION OF FINAL CONCEPT
- 6. TEST RIG SYSTEM
- 7. HARDWARE COST ESTIMATE
- 8. A-FORM AND COST JUSTIFICATION
- 9. PROJECT PROGRESS
- 10. REVIEW OF FORWARD SCHEDULE
- 11. MISCELLANEOUS ITEMS
- 12. CONCLUSIONS
- 13. REFERENCES

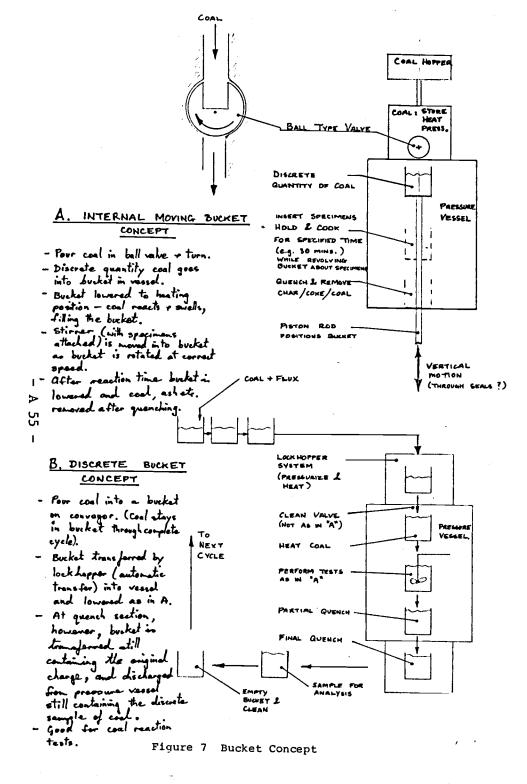
LIST OF FIGURES

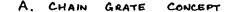
- 1. THE DESIGN PROCESS
- 2. CONCEPTUAL DESIGN PHASE
- 3. GASIFIER TEST RIG OVERALL FUNCTION
- 4. OVERALL FUNCTION STRUCTURE
- 5. REACTOR SUB-FUNCTION
- 6. REACTOR SUB-SUB FUNCTIONS
- 7. BUCKET CONCEPT
- 8. MOVING GRATE CONCEPT
- 9. CENTRIFUGAL CONCEPT A
- 10. CENTRIFUGAL CONCEPT B
- 11. FIXED BED CONCEPT
- 12. CLASSIFICATION MATRIX OF COAL SPECIMEN MOTIONS
- 13. SOLUTION PRINCIPLES FOR FEEDING COAL
- 14. FOUR FINAL COMBINED MATRICES
- 15. SAMPLE CONCEPT SELECTION CHART
- 16. REACTOR CONCEPT
- 17. REACTOR VESSEL
- 18. GASIFIER TEST RIG SCHEMATIC

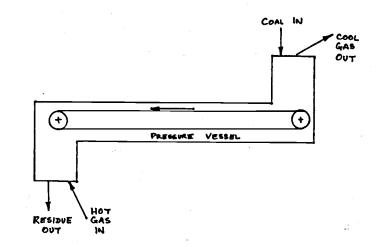
- 19. DENSE PHASE COAL CONVEYING SYSTEM
- 20. SAMPLE COST ESTIMATE DETAIL SHEET
- 21. PROJECT SCHEDULE
- 22. EMBODIMENT DESIGN PHASE
- 23. CHECKLIST FOR EMBODIMENT DESIGN

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- A. GTR FINAL SPECIFICATION
- B. SOLUTION PRINCIPLE MATRICES
- C. CONCEPT SELECTION CHARTS
- D. PRESSURE VESSEL CLOSURE DETAILS
- E. GTR HARDWARE COST ESTIMATE
- F. A-FORM AND COST JUSTIFICATION
- G. WEEKLY REPORTS







B. ROLLER GRATE CONCEPT

Basic idea of this concept (which arose out of chain grate discussion) was to feed coal into a decreasing volume to put it under physical load (equivalent to weight of burdon in gasifier). Hot gas would be passed up through the coal (and through the rollers if meassary). The concept was discussed at length to a further stage than shown here. However, even if the idea worked, the machanical problems within the pressure wasel would make it impracticable.

SPECIMENS ?

HOT

GAS

PROJECT - WEEKLY REPORT

NAME	C. HALES	WEEK	29
SEGMENT	CONCEPT SELECTION	DATE	22.4.83

1. ACCOMPLISHED THIS WEEK

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1.1 Work at Company 18.4.83:

- Met with SL-A for discussion on remaining solution variants and decision on which concept to use for test rig. By discussion (recorded on tape) it became clear that the best concept would be the top fed fixed bed design with a load applied to the coal by means of a piston (hydraulically or pneumatically operated). Specimens would be mounted on a rotating shaft and coke/ash would be augered out at the bottom. Rather than heating and injecting a whole range of gases it was decided that partial combustion of the coal should take place at the bottom to generate a certain proportion of the gas mix.

The plan now is to concentrate on developing an overall cost estimate for submission on the A-form (for overall project approval). Once this has been done (in approximately 3 weeks from now), a formal presentation of the chosen test rig concept will be made to all those associated with the project. Embodiment design would then proceed, after general approval.

- Met with SL_A to discuss test rig concepts. He concurred with the choice from the point of view of coal tests, and simple operation. Note: $R2_A$ and RL_A had both previously expressed a strong preference for this concept from the operations point of view.

1.2 Met with SE_VE, Gray Tool Company Representative St Neots 20.4.83.

Discussed pressure vessel details for test rig and calculated budget price for a 22 in. I.D. x 2500 p.s.i. vessel at £18,400. Price was detailed in such a way that a range of other prices could be calculated, the lowest being £13,300 for a 20 in. I.D. x 1500 p.s.i. vessel. These are budget prices only.

- 1.3 Coal Feed System obtained budget estimate of £8,000 9,000 for a dense phase coal feeding system incorporating the following:
 - 1-ton capacity coal hopper (outside building)
 - 3 cu.ft. x 40 p.s.i. holding vessel
 - 2 lb/hour feed system 20 ft. distance into building and up to H.P. lockhopper.

- 1.4 2-ton Chain Hoist and Gantry. Obtained budget quote of £875 for:
 - 2-ton geared trolley + hoist
 - free standing gantry on four rubber tyred wheels - 10 ft. rail height.
- 1.5 Meeting with DE-U Design Engineer, University Engineering Department, Cambridge 22.4.83.

Reviewed hardware involved in test rig concept and estimated costs for all major components that had not been accounted for. This gave sufficient information for completing full cost estimate sheets.

1.6 Completed a set of 9 cost estimate detail sheets (as introduced in report GTR-1). This gives a comprehensive first estimate totalling about £85,000, broken down by sub-system.

2. PLANNED FOR NEXT WEEK

- 2.1 Meeting at Lomponyto discuss cost estimates and general approach to submission of the A-form for project approval.
- 2.2. Meeting with C. Rodwell to discuss research programme, with particular regard to describing projects in terms of 'profiles'.
- 2.3 First draft of A-form with supporting justification.

2.4 General drawing to show elements of test rig system.

SUMMARY

Report No. GTR 3

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I.

GASIFIER TEST RIG

Prepared by: C. Hales

University Engineering Department Trumpington Street Cambridge CB2 1PZ This is the third in a series of semi-annual progress reports on the design of a high-pressure materials test rig for THE COMPANY. The work is being carried out in conjunction with research at Cambridge University on the application of particular engineering design methods. Formal design methods developed in Germany and presented by Professors Pahl and Beitz have been successfully applied to the specification and conceptual phases of the test rig design. Embodiment design, the next phase, has been completed to the point where a developed concept existed in sufficient detail to allow a full project review by the Sem management, and the Director of the Education programme.

The report leads on from report GTR-2, and covers the six months from July 1983 through December 1983, during which the following progress was made:

- Revised A-Form and project proposal, together with cost justification, submitted to management.
- Cost estimate breakdown revised to be compatible with computer system.
- Approximate gas reactivity calculations completed by staff.
- Technical discussions held at **SER** which highlighted such problems as gas/tar separation and solids removal.
- Revision of basic rig internal configuration to incorporate tar/gas separation within the test chamber, together with gas recirculation to reduce operating costs.
- '- Development of test rig concept to a further level of detail, including preliminary vessel calculations to BS 5500.
- Parallel development, by staff, of the proposed materials test programme.
- Formal presentation of the proposed test programme and rig design to **be proposed** senior management.

Although cooperation from staff at the has continued to be excellent, progress during this six months has been slow, and the project has fallen behind schedule. Considerable time has been required for preparing and presenting the case for formal project approval and for eliciting support within the Company and generally. By the end of this reporting period, the point had been reached where a decision on the future of the project was imminent. Depending on the outcome, the design work will either terminate at an agreed level of detail, or progress through full detailing into construction and commissioning of the equipment.

PHeles

CONTENTS

- 1. INTRODUCTION
- 2. A-FORM AND TEST RIG PROPOSAL
- 3. THE BASIC CONCEPT
 - 3.1 Summary Description of Concept
 - 3.2 Input Gases
 - 3.3 Gas and Tar Removal
 - 3.4 Wear Test Specimens
 - 3.5 Corrosion Specimens
 - 3.6 Pressure Vessel Calculations
 - 3.7 Information for Design
- 4. THE DEVELOPED CONCEPT
 - 4.1 Pahl and Beitz Design Method
 - 4.2 Description of Developed Concept
 - 4.2.1 Overall System
 - 4.2.2 Reactor Vessel
 - 4.3 Discussion on Developed Concept
 - 4.3.1 Clarity
 - 4.3.2 Simplicity
 - 4.3.3 Safety
 - 4.3.4 Principles of Embodiment Design
- 5. PRESENTATION OF PROJECT TO MANAGEMENT
- 6. FUTURE OPTIONS AND SCHEDULE
- 7. MISCELLANEOUS ITEMS
 - 7.1 Visit to Test Rig Facility Building (5.12.83)7.2 WHESSOE Pressure Vessel Engineering Software, PVE5
 - 7.3 High Pressure Plastometer LRS
 - 7.4 7.6 Meetings and Visits
- 8. CONCLUSIONS
- 9. ACKNOWLEDGMENTS
- 10. REFERENCES

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- 2. GASIFIER TEST RIG SCHEMATIC
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- 4. EMBODIMENT DESIGN PHASE PAHL AND BEITZ
- 5. SUMMARY CHART FOR EMBODIMENT DESIGN
- 6. CHECKLIST FOR EMBODIMENT DESIGN PAHL AND BEITZ

- 7. DEVELOPED GASIFIER TEST RIG SCHEMATIC
- 8. DEVELOPED REACTOR CONCEPT
- 9. PROJECT SCHEDULE
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- C. PROGRAMME OBJECTIVES AND DESCRIPTION OF TEST RIG CONCEPT
- D. SELECTED PROJECT CORRESPONDENCE
- E. LISTING OF SPECIFIC SUPPLIERS CONTACTED
- F. PRELIMINARY GAS REACTIVITY CALCULATIONS
- G. PRELIMINARY PRESSURE VESSEL CALCULATIONS
- H. DESCRIPTION OF DEVELOPED TEST RIG CONCEPT
- I. PROPOSED WEAR TEST PROGRAMME
- J. VISUAL AIDS FOR FORMAL PRESENTATION
- K. WEEKLY REPORTS (No.40 No.65)
- L. OUARTER SCALE REACTOR VESSEL DRAWING

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Report No. GTR 4

GASIFIER TEST RIG CONTROL SYSTEM

PREFACE

This report covers the period 7 - 25 May 1984 during which CCE from IIT Research Institute, Chicago, U.S.A. worked for one week on conceptual design of the control system in Chicago, followed by two weeks at m and Cambridge in Britain. C. Hales prepared a brief, and sent a package of preliminary information to Chicago during late April, then gave full design and drafting assistance during the final two weeks. Excellent cooperation and assistance was given by the staff during the period, and this report was issued in conjunction with an oral presentation at a final meeting, held at ind on Friday 25 May 1984.

Prepared by: CCE &

C Hales University Engineering Department Trumpington Street Cambridge CB2 1PZ

May 1984

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CONTENTS

- 1. INTRODUCTION
- OVERALL SYSTEM DESCRIPTION
- 3. GENERAL REQUIREMENTS
- 4. CONTROL SYSTEM BLOCK DIAGRAM
- 5. CONTROL CABINETS LAYOUT
- 6. SUB-SYSTEMS
 - 6.1 Introduction
 - 6.2 Pressure Control System
 - 6.3 Temperature Control System
 - 6.4 Gas Mixing System
 - 6.5 Gas/Tar Removal System
 - 6.6 Solids Removal System
 - 6.7 Coal Delivery System
 - 6.8 Alarms, Overrides and Shutdowns
- 7. SAFETY CONSIDERATIONS
 - 7.1 Introduction
 - 7.2 Description of Shutdown Modes
 - 7.3 Shutdown Modes State Table
- 8. CONCLUSIONS

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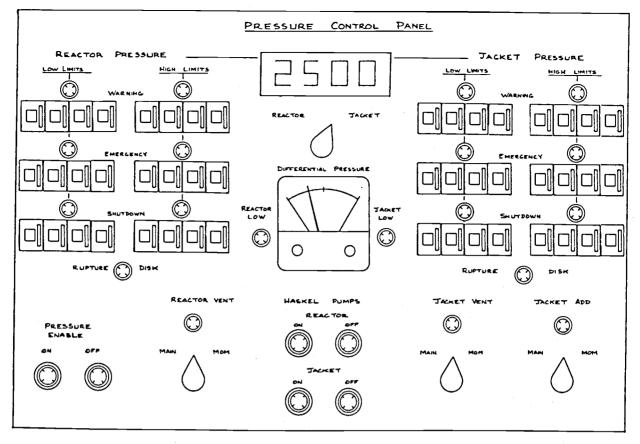
- 8.1 Detail Design Procedures
- 8.2 Manpower

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- 3. Control Panels and Cabinet
- 4. Conceptual Layout of Pressure Control Panel
- 5. Pressure Control Sensor Table
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- 16. Conceptual Layout of Coal Feed System Control Panel
- 17. Coal Feed Sensor Table
- 18. Conceptual Layout of Alarm/Override Panel
- 19. Sample Shutdown Mode Table

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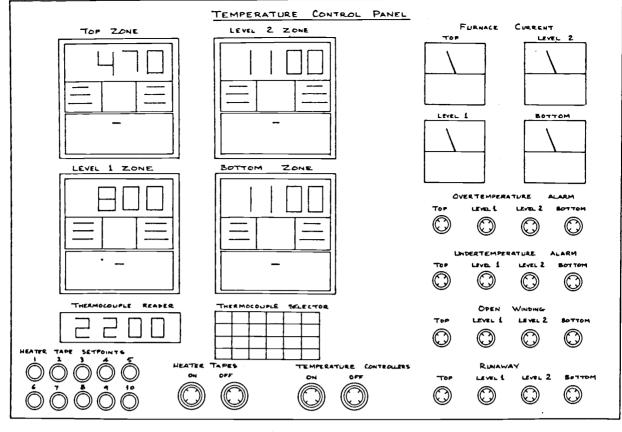
- A. Electrical Data
- B. List of Demands/Wishes
- C. Weekly Reports
- D. Process and Instrumentation (P & I) Diagram (fold-out drawing)



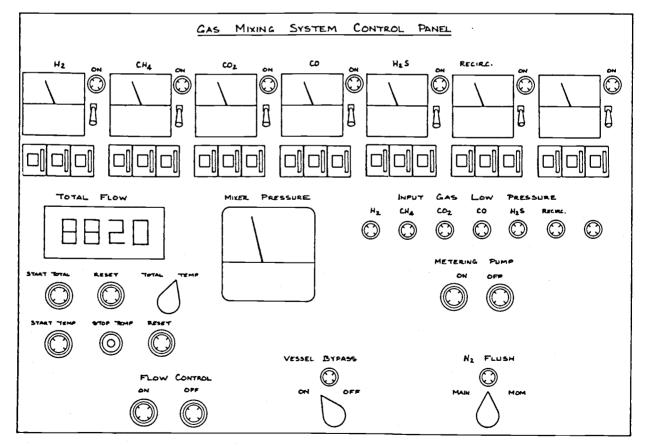
CONCEPTUAL LAYOUT OF PRESSURE CONTROL PANEL

SENSOR		PRO	ESS DA	-TA		NCTION	
DESIGNATION	SENSOR DESCRIPTION	PRESSURE (PSIG)	TEMP. (0		DATA AQU		ALARM /SD
PS7	PRESSURE SWITCH, LOW SETPOINT SET @	2500	Амв	Nz	-		OFF
PS8	PRESSURE SWITCH; LOW SETPOINT SET®	2500		REACTOR CAS			OFF
85 9	PRESSURE SWITCH, HIGH SETPOINT SETE	2.500		REALTOR GAS			DUMP
Psio	PRESSURE SWITCH, LOW SETPOINT SET #	2500		Nz			OFF
PSII	PRESSURE SWITCH; HIGH SETPOINT SET C	2500		Nz			DUMP
DPT 1	DIFFERENTIAL PRESSURE TRANSDUCER	± 50 PSID		N2/REACTOR GAS		×	IDLE
PT2	PRESSURE TRANSDUCER	2500		REACTOR CAS	×	×	LO HI
PT3	PRESSURE TRANSDUCER	2500	-	Nz	×	×	DUMP DUMP LO HI
						- 	Dump Dump

SENSOR TABLE



CONCEPTUAL LAYOUT OF TEMPERATURE CONTROL PANEL



CONCEPTUAL LAYOUT OF GAS MIXING SYSTEM CONTROL PANEL

- A 62 -

Report No. GTR 5

GASIFIER TEST RIG (Embodiment Design/Detail Design)

Rear Stocks and the

Prepared by: C Hales

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University Engineering Department Trumpington Street Cambridge CB2 1PZ

August 1984

This is the fifth in a series of periodic progress reports on the design of a high pressure materials test rig for THE COMPANY. The work is being carried out in conjunction with research at Cambridge University on the application of particular engineering design methods. The formal methodology of Professors Pahl and Beitz, developed in Germany, has now been successfully applied to the Specification (Report GTR-1), Conceptual Design (Report GTR-2) and Embodiment Design (Report GTR-3) phases of the project. The basic Control System has also been designed (GTR-4).

This report leads on from GTR-3 and covers the seven months from December 1983 through July 1984 during which the following progress was made:

- Formal presentation of the proposed test rig and test programme to **mm** staff.
- Decision by and management to proceed through the detail design phase of the project.
- Agreement with the design and drafting group (Services Division) on assistance with the detail design and drafting work involving an estimated 200 detail drawings.
- Design conditions for test rig increased to 170 bar (2500 psi) maximum pressure and 1300°C maximum temperature.
- Coal supply system more closely defined and a formal quotation obtained.
- Basic control system design work completed.
- Preliminary meeting with **En** Quality Assurance Dept.
- Preliminary layout of rig in Test Rig Building.
- A Review of Design and Drafting Practice at the

Progress during the period has been patchy and slow, except for the control system design work. A major reason for this was the lack of any experienced design draftsperson to assist with the detail design, during the first six months of the period, and it caused considerable concern as the project increasingly fell behind schedule.

A review of the design and drafting situation was prepared and presented to management in an effort to highlight some of the difficulties together with possible approaches for improvement.

Although authorisation was given for the project to continue through detail design, no decision has been made yet as to whether the test rig will be constructed or not.

CHales August 1984

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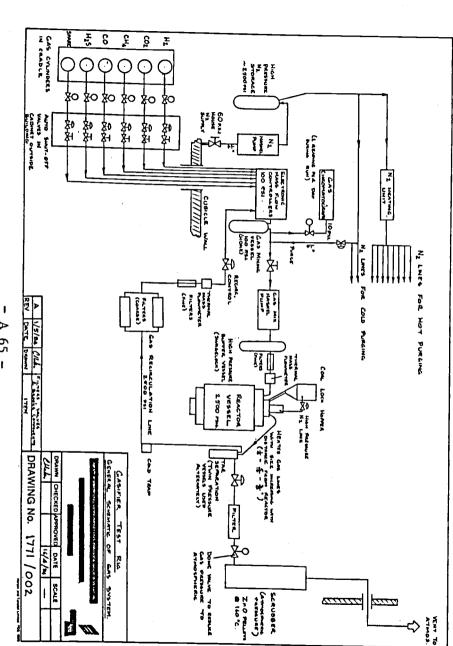
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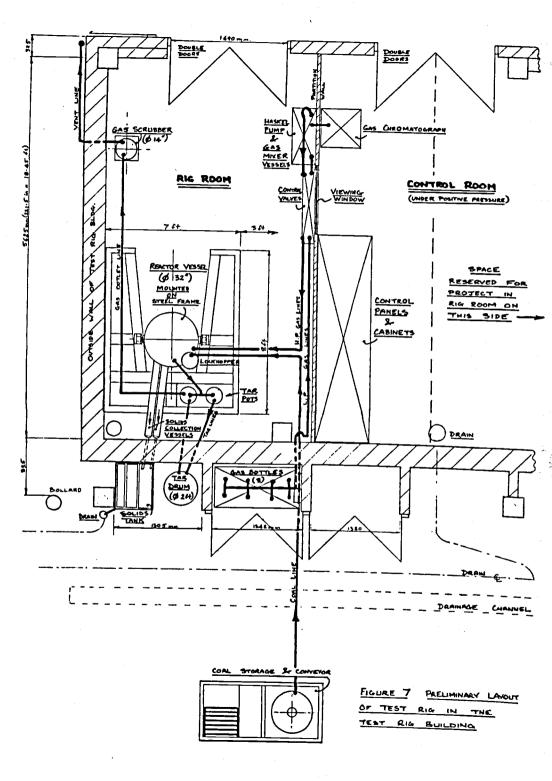
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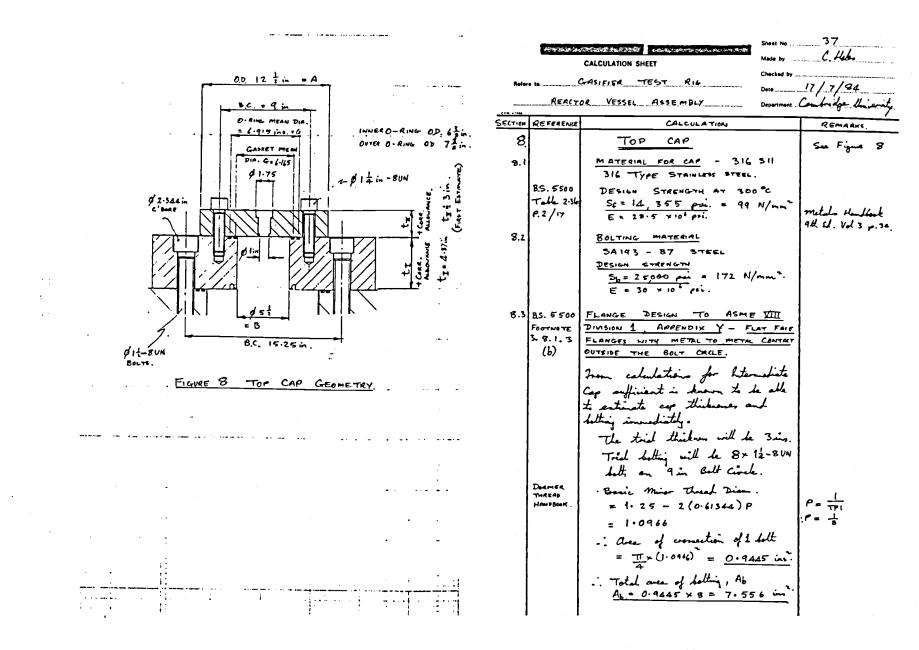
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SUMMARY

Report No. GTR-6

GASIFIER TEST RIG (Detail Design)

Prepared by: C Hales University Engineering Department Trumpington Street Cambridge CB2 1PZ

August 1985

This is the sixth in a series of periodic progress reports on the design of a high pressure materials test rig for THE COMPANY. The work is being carried out in conjunction with research at Cambridge University on analysing the engineering design process as it occurs in industry. During the project the formal design procedures recommended by Professors Pahl and Beitz in Germany have been closely followed, providing a structured approach with detailed records as follows:

Report GTR-1 : Task Clarification and Specification Report GTR-2 : Conceptual Design Report GTR-3 : Embodiment Design I Report GTR-4 : Control System Design Report GTR-5 : Embodiment Design II/Detail Design I.

This particular report follows on from GTR-5 and covers the final ten months from July 1984 through May 1985 during which the following progress was made:

- Completion of detail design drawings for the gas scrubber and the reactor vessel support frame.
- Agreement reached on space allocation and zone 2 electrical requirements for the rig, together with arrangements for the coal storage and supply system.
- Finalization of the rig layout in the Test Rig Building.
- Decision made regarding the future of the test rig: construction will not proceed at this time and the design records will be formally stored for future reference.
- Detailed planning for long term storage of project design records and drawings.
- Design assistance with three other proposed test rigs.

Detail drawings of the tar/gas separators, the solids collection vessels, the solids storage tanks and the reactor vessel internals have not been completed, but it was decided at a project meeting that, as construction of the rig has been indefinitely postponed, sketches for future guidance would be adequate instead.

One final report, GTR-7, will summarize the complete project and provide guidelines for reactivating and completing the work at a future date. GTR-7 will also contain an index to the previous six reports.



August 1985

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SUMMARY OF MEETING HELD AT WAR ON THURSDAY 26 JULY 1984

Conference Room 3 10.15 am

Present: DE_S

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BPO-S CDE R2-A SL-A

Subject: ELECTRICAL HAZARD RATING AND SPACE ALLOCATION FOR GASIFIER TEST RIG

1. ZONE 2 ELECTRICAL REQUIREMENTS

- All electrical equipment to be non-sparking and totally enclosed.
- Maximum of 300°C on the surface of any equipment.
- Fixed wiring throughout.

For this rig it was decided that the best option was the following:

- Enclose all the control cabinets and date acquisition equipment in a sealed control cubicle (within the Zone 2 lab. area) operating at slightly positive air pressure relative to the Lab.
- 2. In addition feed a small, continuous flow of air (from the shop air supply) to each control cabinet, in order to ensure a positive air pressure inside the cabinets in the event of pressure equalization between 'control room' and the Lab. Control cabinets to be dustproof (not necessarily fully sealed), and the Services Division will install the necessary airlines. Project to provide regulator.
- 3. All solenoid valves, motors, electronic gas flow controllers etc must have BASEEFA (or equivalent) rating for Zone 2 electrical. Maintenance tools should be pneumatic rather than electrical.
- 4. No electrical outlets (sockets) will be allowed in the Lab. area but, if necessary, they will be allowed within the control room.

2. SPACE ALLOCATED FOR THE GASIFIER TEST RIG

 After a detailed discussion it was agreed that although it would be physically possible to install the complete test rig and associated control room within the space of a single Lab. module, it would be extremely unwise to do so, for the following reasons:

- 2
 - Safety hazard for operators and maintenance staff, due to lack of room and handling heavy components and a cluttered floor space.
 - Loss in modularity and flexibility of the system, which would restrict its use on different projects in the future.
 - Access difficulties to the test rig, entailing the use of an inner door with pressure equalization problems.
 - Tortuous escape path for operators in the event of an emergency.
 - Minimal access for visitors or non-operator personnel.
 - Minimal space for maintenance work and storage of tools and equipment with heavy reliance on use of central building preparation room.
 - Other possibilities were considered such as the use of two complete modules, the relocation of the rig in a different module and module sharing between projects.

An acceptable compromise was evolved as follows (subject to confirmation and agreement by Station Directorate):

- Locate all pressurized test equipment in the north end module, with its own double door entrance.
- Convert the adjacent module into a separate, sealed and pressurized control room by partitioning up to the roof and incorporating polycarbonate viewing windows on each side. This work will be provided by the Services Division on the understanding that the control room will be shared by the Gasifier Test Rig Project and the project to the south of the control room. Entrance to the control room will be direct, and quite separate from entrance to the test rig cubicle.
- Normal security for access to the control room, but the use of a special procedure for access to the gasifier test rig module will be required.
- Áll electrical wiring in rig area to be MICE or MICC pyrocable, and an emergency shut-down button to be provided by the Services Division outside the laboratory.
- Steel panelling to be used as a safety shield where necessary along the control room wall (partition wall).

/cont...

3. COAL STORAGE AND GAS STORAGE

The position of the coal storage and feeding system structure on the forecourt in front of the north module of Lab.2 is acceptable as was shown on the plan of the rig system. The suggestion by that the structure should be made large enough to allow a certain capacity of additional gas and coal storage was appreciated and will provide an excellent operational buffer storage facility. The possibility of using lo-bottle cradles for gas storage is under consideration. If necessary the bottle bays for the test rig module may be extended by up to six inches outwards.

4. POWER SUPPLY

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It appears that sufficient power will be available for the rig, based on first order approximations, but a closer definition of power requirements is needed. This will be possible only after all the ancillary equipment has been sized and selected. One general point is that starting loads for heavy power users should be staggered, using intervals of about two minutes.

5. <u>REMOTE CONTROL OF RIG</u>

A 32-channel fibre optic link is provided between the Test Rig Facility and the computer in the main building. This gives the equivalent of two twisted wire pairs of communication per module, one for transmitting and one for receiving. The fibre optic link terminates on a panel in the upstairs office of the Test Rig Facility.

ACTION ITEMS

1. Management approval of module space to be allocated to the Gasifier Test Rig in the event that the rig is constructed. Written notification of this.

Responsible: BPO-S

 Written confirmation that all valves and equipment to be supplied by Hale Hamilton would meet the BASEEFA (or equivalent) rating to meet the Zone 2 electrical specification.

Responsible: R2_A

3. Written confirmation that all valves, flowmeters and other equipment to be supplied by Brooks Instruments would meet the BASEEFA (or equivalent) rating to meet the Zone 2 electrical specification.

Responsible: C Hales

C Hales Research Engineer

8 August 1984

<u>Distribution</u> :	DE_S AM_A 52-A M_S BPO-S M_A AM_S R2_A SL_A

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PROJECT - WEEKLY REPORT

NAME	C. HALES	WEEK	97	
SEGMENT	DETAIL DESIGN	DATE	10.8.84	

1. ACCOMPLISHED THIS WEEK

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1.1 Work at 🗰 on 6.8.84 (2.45 - 5.15 pm)

- Discussion with CDD regarding type of rubber to use for scrubber gaskets. C Hales decided on silicone rubber so as to be safe on temperature rating.
- Quick meeting with BPO-5. C Hales will write a note summarizing what was discussed and agreed to at the meeting held on 24.7.84. This will be distributed on approval by BPO-5.
- Meeting with AM_A. Discussed the following:
 - o Progress with detail design.
 - o Weekly reports up to No.97.
 - o How to get an estimate of scrubber performance.
 - o Abstracts of 4 papers to be submitted for ICED-85.
 - o Opening ceremony for Test Rig Facility and SL_A's idea for a House Committee.
 - Lack of progress on A-form submission.
 - o Test rig layout in the building module.

1.2 Telephone call regarding Scrubber on 7.8.84

DE-U, Chemical Eng. Dept., Cambridge University

- He has looked through various papers and completed a series of calculations on the scrubbing of $\rm H_2S$ using Z=0. These are very
- approximate (but adequate for us).
- Results were as follows:
 - 1. ZnO to ZnS reaction loses efficiency with time.
 - 2. For existing 10 in. diam. scrubber and flowrate of 2 cu.ft./hour bed would last 100,000 hours if there was 100% reaction. For 12 in. diam. bed and 60 cu.ft./ hour flowrate, equivalent life would be about 7,000 hours. As the maximum practicable conversion is about 50% these values should be reduced to about 50,000 and 3,000 hours respectively.
 - The reaction is highly non linear and therefore predictions based on scale-up are unreliable.

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(3.20-4)

(5.15)

(2-2.50)

(2.50-4)

(4-4.10)

(4.10 - 5.30)

- 4. The higher the reaction temperature the better the reaction efficiency, up to 700° C.
- 5. Experiments should be carried out to find the length of bed required using the time taken for ${\rm H}_2 S$ concen-

tration to rise in the output gas as a criteria.

- 1.3 Work at moon 8.8.84 (3.00 pm 6.05 pm)
- (3-3.20) Discussed details of vessel frame with CDD.
 - Discussed floor loadings under vessel frame with BPO_S (280 lb/ft² = 15 KN/m² max.). Live load of loo

lb/ft² to be added to vessel dead load over whole frame (i.e. an additional 2¹ tons). Discussed column feet, grouting etc. then the proposed 2 ton gantry crane. He didn't like the proposed runway column positions - on edge of floor pad - will cause cracks.

- (4-5.10) Further discussions with CDD on the vessel supports.
 - Worked out a base arrangement for frame.
 - Updated SL_A on project progress.
- (5.25-5.50) Updated AM_A on project progress and discussed some points of concern over the Test Rig Building.
- 1.4 Work at CUED on 9.8.84
 - Wrote 4-page summary on the meeting held with BPO_S, on 26.7.84 together with letter to BPO_S.
- (6.30-8.30 pm) Worked out heights and levels for vessels.

1.5 Work at me on 10.8.84 (11.15 am - 5.30 pm)

- (11.15-12.10) Worked out layout of solids collection vessels in cafeteria at Liverpool St. Station (as had headache). Also solids tank outside building (1 hour).
 - Brief chat with AD_{1-R} in lobby.
 - Brief chat with AD2-R in LRS cafeteria. Updated him on project progress.
 - Went through new solids collection vessel layout with CDD e. Looks OK. Timely as he was doing calculations based on old layout.
 - Discussions with RLA' but little of use to project.
 - BPO-S read the draft summary of the meeting and approved it, with minor additions. Services Div. will pay for providing the test rig control room.
 - Updated SL_A on project progress by phone.
 - Explained more of background to project and research to CDD , and DR_S. Went through work to be done by CDD.

APPENDIX B

FIELD RESEARCH ISSUES

B.1 OVERALL APPROACH

Observation-based studies are commonly divided into four groups within a spectrum of observer involvement [Burgess (C6), Denzin (C8)]:

(i) Complete observer;

(ii) Observer-as-participant;

(iii) Participant-as-observer;

(iv) Complete participant.

From the engineering design point of view this may be simplified into just three categories, each with a different degree of researcher involvement:

(i) Direct observation

(ii) Participant observation

(iii) Action research

Direct Observation

The researcher remains as unobtrusive as possible, recording what happens without taking part. It has the advantage that the field-work is wholly devoted to gathering data, but the disadvantage that the observer is one step removed from the process under study, as discussed by Thomas and Carroll (C32). They found that even with video recordings interpretation of direct observation data is difficult in engineering design. What goes on while the observer is absent is generally lost.

Participant Observation

The researcher takes part in the activity, at the same time observing and recording events as they occur. This has the advantage that more subtle aspects of engineering design can be explored. Madge (C2O) suggests that it can help to reduce distortion as the researcher comes to think in the same way as the respondents, while they tend to behave unselfconsciously. Disadvantages are that the field-work is split between doing the job and recording what goes on (quite different parallel activities) and that the data is more likely to be affected by researcher bias. Adams and Preiss; Argyris; Mann and Likert; Candill and Roberts; Le Clair and Bain (Cl) all contribute on these points, offering advice to the participant observer. Denzin (C8) lists six problems to be overcome:

(i) Gaining entry to the group (with repeated returns);

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- (ii) Establishing and maintaining a social identity permitting ongoing social relationships and observations;
- (iii) Fitting in with the natural flow and rhythm without trying to change the behaviour of those observed;
- (iv) Remaining objective and alert to deception in the light of new experiences;
- (v) Developing a reliable method of recording field notes;

(vi) Knowing when to finish, then leaving at the proper time.

Origins, definitions, problems and applications of participant observation from the sociological and social anthropological points of view are fully discussed in the report by Drucker-Brown (C9), commissioned by the then Social Science Research Council in Britain. To the design researcher the report shows that despite the common use of participant observation as a research method in the social sciences there is still much debate over terminology, types of interaction and strategies to be used. It was the method considered appropriate for gathering data on this project (C11). <u>Action Research</u>

The researcher as a 'complete participant' not only influences the whole situation through deep involvement, but actively plans to do so [Zeisel (C37)]. It is a different from participant observation and is used for a different purpose, as shown by Wilson (B71). In general while participant observation is used for developing understanding of an activity, action research is used for experimenting with new approaches for carrying out an activity. The only time that action research was specifically used during this study was for the planned experiment with the design of the control system. At certain other times a little 'action research' was applied to help overcome particular obstacles. It was felt better to try it and to record the fact, than remain an observer to the detriment of the project.

B.2 CASE SETTING

A 'natural' setting was used for this study rather than a 'contrived' one, [see Gregory (Cll)], and the choice was limited by seven constraints:

(i) Commercial engineering design project required within a company.(ii) Task to be complex rather than simple, requiring a team of people.

- (iii) Design problem to be 'ill-defined', within a routine project.
- (iv) Company environment to be accepting of a participant observer.

- B 2 -

(v) 2-year project to start concurrently with the research programme.

(vi) Company to be interested in improving their engineering design.

(vii) Company to fund the research effort in return for design effort. These constraints are more specific than the selection criteria for case settings offered by Burgess (C6) for example:

(i) Progression from simple to complex situations during study?

(ii) Easy access to the company for the researcher?

(iii) Possibility for researcher to take an unobtrusive role?

(iv) Permission likely for observation during touchy situations?

(v) Researcher able to participate in a series of ongoing activities? The setting which satisfied the seven specific constraints imposed on the present study was considered to satisfy these general selection criteria.

B.3 PARTICIPANT OBSERVER

Comparisons between observation-based field studies, such as those of Bucciarelli (C5); Hastings (C12); Hykin (C13); Saren (C29); and Schalcher (C30), suggest that the personality of the researcher is an important factor in the use of participant observation. Adams and Preiss (C1) consider that the influence of the researcher on the field situation is central to the research, and the question is not how to avoid this influence but how to "...control and judge the quantity and quality of that effect". A non-threatening role which "...gradually evolves through changing perceptions..." is required, with the integrity to gain and maintain the confidence of the respondents. Encouragement of respondents is recommended by Adams and Preiss, despite the problems of bias it introduces, and typical techniques suggested are:

(i) Giving small services;

(ii) Using personal knowledge and expertise;

(iii) Using the 'therapeutic' value of an interview;

(iv) Becoming involved in respondents' concerns.

Argyris, in the same book (Cl), concludes that:

- (i) Researcher self-motivation with feelings of responsibility towards the organization and respect for its members is vital.
- (ii) Active researcher involvement is required if expression of personal ideas and feelings is expected from respondents: a passive role only arouses anxiety.

- (iii) The researcher must accept manipulation by respondents, as this shows their concern for the study and gives clues as to the forces at work in the organization.
- (iv) Research findings must be communicated back to the organization.

B.4 DATA COLLECTION

Participant observation of the Gasifier Test Rig project followed patterns apparent in social psychology, social anthropology and human organization research. Careful note was taken of points emphasized in the literature, such as: positively motivating and gaining the confidence of respondents; maintaining integrity and a non-threatening role; ensuring participation of all the people involved; checking back with superiors; and handling of misunderstandings. As the procedure for the design work was clearly prescribed, the project showed immediate progress, and because the field research issues were quickly resolved useful data was collected from the start. In particular:

- (i) Credibility of the participant observer was established;
- (ii) Regular contact between the participant observer and respondents was established, and maintained through weekly visits;
- (iii) The participant observer became actively involved and developed a regular procedure for reporting back to the company;
- (iv) Conscious efforts were made to stimulate participation and response within the project.

The following techniques were used for data collection and recording:

- (i) Daily journal (notebook) to record details of meetings, work, etc.;
- (ii) Design notebooks;
- (iii) Weekly meetings with project team members;
- (iv) Audio tape-recordings of selected design sessions;
- (v) Weekly reports to summarize design and research progress;
- (vi) Occasional photographs.

A total of 37 people were involved in the project to the extent of having identifiable input. Within the sponsoring company these ranged from the research staff to engineering services staff, and from technician level to director level. At each level, dialogues, working sessions, small group meetings, chance meetings and larger formal meetings were recorded as

'interchanges', as defined by Baker (C2, p.1014), with extra notes on informal social contact and personal discussions. For each visit to the Company a plan for the day was written beforehand. What actually happened was recorded as it happened, and more detailed notes were written after the day's work. Although the data was specifically concerned with the the test rig project, wider issues were sometimes involved and where this took time which would otherwise have been spent on design work it was recorded. For instance designer effort was spent helping with the justification for project construction funding and on two formal presentations made on the design and draughting problems. During 116 weeks of design project time (including holidays) 100 half-day or full-day visits were made to the sponsoring company. 1373 interchanges were recorded covering 2368 hours of project effort including 120 telephone calls and 10 visits to outside organizations. The data from this amounted to 1180 pages of field notes and 76 hours of audio tapes.

Notes on data collection:

- Bound notebooks were found to be better than page limited diaries. They are simple, portable and fit in with engineering design work.
 Size-reduced photocopies were used to compile field data files.
- (ii) Identical notebooks were used for design work and field notes: this facilitated unobtrusive note-taking as events occurred.
- (iii) When events moved quickly it was impossible to keep up with notes. Sketchy notes were made and filled out after the day's work.
- (iv) When the participant observer was strongly 'participating', field notes could not be made without disrupting the working atmosphere.
- (v) Microcassette tape-recording was tolerated except under particular circumstances, and was found to be simple and unobtrusive. In the design office it became accepted in a good natured way, but at the management levels it was accepted only when technical matters were being discussed and permission had been given. If the machine was likely to inhibit a discussion it was left off, and in full view. The tape-recordings were used only as back-up and reference data.
- (vi) Very little data other than time spent and work done was recorded while the participant observer was working alone.
- (vii) Most notebook entries simply recorded what was said or done and there was little time for subjective interpretation or reflection.

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- (viii) As data was collected for over two years a lot of background and repetitive information accumulated. This seemed inefficient but it later helped in verifying changes in 'mood' etc.
- (ix) It was considered important to try and gather Self-Perception data to help assess how people perceived their roles within the project team. Belbin's approach (I2) was tried, but with limited success as team members were suspicious of why a design engineer should want such information. If a researcher with credibility in social psychology also been involved, better data would have resulted.
- (x) Events were usually recorded as they occurred and multiple methods of data collection were used. Cross-checks for reliability and bias could be made by 'triangulation' (comparison of data from different sources) as recommended by Denzin (C8) and Madge (C20).

B.5 POSSIBILITIES AND LIMITATIONS

For this project a stable working relationship was established between the participant observer and the Company through simple control mechanisms: if the researcher became too involved the company could withdraw observation privileges without terminating the project and if company tensions made participation risky, the researcher could withdraw to a direct observation role while maintaining contractual obligations. (Note: neither direct observation nor action research offer such simple 'fall-back positions'). Establishing a stable relationship was critical, as the focus then shifted away from the researcher towards the design project itself, and by virtue of a combined 'design engineer' and 'visitor' status the researcher gained the privilege of legitimate access at many levels in the organization. This gave the researcher the opportunity of collecting data at different 'resolution levels'. It gave the management a chance to get some feedback and the project team a new communication path to try. It also became possible for the researcher to try various design techniques and plan a few short-duration experiments within the overall project.

Main limiting factors found during this field study were:

(i) Credibility as a researcher depended on that as a design engineer.

(ii) Data was limited to what one researcher could grasp and cope with.(iii) Fast-moving events were difficult for a single observer to record.(iv) Design work and research work had to be carried out in parallel.

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APPENDIX C

DATA PROCESSING

C.1 FIELD DATA

Raw Data Files

Integration of the raw field data into a single set of 3 files was done by photocopying all field notes, correspondence, design notes, drawings and other information at reduced scale. This resulted in 1180 sheets filed in chronological order. The following steps were then carried out:

(i) Check for ommissions and incorrect sequencing;

(ii) Removal of irrelevant notes and records;

- (iii) Correlation to avoid double-counting data from multiple sources;
- (v) Colour-coding the 37 project participants as shown in Figure C-1 (end of text) and flagging their involvement in each interchange.

Tape-Recordings

Audio tape-recordings were filed chronologically for use as back-up data. Weekly Reports

Weekly reports were filed by number for use in cross-checking the data.

Gasifier Test Rig Design Reports

These six reports were to provide a detailed record for the Company rather than for the research and were not used as research data for the analysis.

C.2 INTERCHANGE DATA SHEETS

Once the field data files had been compiled and marked up it became clear that if the essential information could be extracted and transferred on to standardized sheets this would provide a categorized data summary suitable for analysis. Experiments led to development of the 'Interchange Data Sheet' shown in Figure C-2, and a set of such sheets was completed for each participant. Column entries for each record were:

Interchange Number - record number for participant - ascending order.

Date - date of interchange in time-of-day order.

Time- observed time for interchange in decimal hours (to 0.1 hour).Type- type of interchange and the total number of people involved.Location- location of the participant at the time of the interchange.

- <u>Topic</u> nature of work, discussion or activity during the interchange. * <u>Mood</u> - observed 'mood' of the participant during the interchange. <u>Remarks</u> - qualifying statements to add context and clarify meaning.
- * This was not the 'mood' of the interchange itself. For example a person may be observed as being enthusiastic in a meeting generally observed to be quiet. Words used were taken directly from the source data and not from a menu of standard terms. The 'mood' column therefore reflects the source data commentary as accurately as possible. If no indication of 'mood' was recorded, a blank was left in the 'mood' column.

The field data was reduced to 2488 individual records on 63 Interchange Data Sheets. Entries were cross-checked (C11, p.777) and a master list of interchanges compiled. A great saving in effort could have been made if every event had been assigned an interchange number in chronological order from the start, but many could not be put in order until the records for each person had been completed and scanned. The most awkward items were letters which had been sent out with carbon copies at a particular time and were received by people at later times, after other interchanges had taken place. Unlike a telephone call, where all participants are present at the time, the writing and the receipt of letters had to be treated as separate interchanges. Two months of full-time effort was spent checking the data sheets for consistency and accuracy.

Notes on Interchange Data Sheets:

- Source data that was missing or out of chronological order caused errors in the interchange sheet. This was time-consuming to fix.
- (ii) Errors were not easy to pick up until data sheets were finished for several participants, and by then changes were difficult to make.
- (iii) To test the data sheet format those participants with only a few interchanges were considered first. In retrospect it is clear that sheets for the participant with the most interchanges should have been completed first, to structure the master list of interchanges.

The data sheets were reviewed by the project manager at the Company before being processed any further. Records were checked and in particular the manager's own set was closely examined. Although the use of certain words was questioned, and qualifying remarks were suggested, there was agreement over the data entries. Particular incidents were recalled, and the sheets checked for accuracy: again there was agreement. For example the manager found an entry for one participant which indicated an out-of-character mood known to occur only in specific circumstances. A check on the other entries or 'fields' for that record confirmed that just such circumstances had been observed. As a further check on the data sheet accuracy a book of 35 summary sheets was produced, listing the hours for all interchanges and showing which participants were involved in each one. This provided a cross-reference for verifying all quantitative entries. The format of the Interchange Data Sheets had been designed for easy transfer of records into a computer database, although at the time there was no certainty that the data could or should be handled using a computer. It was decided that an attempt to do this would be made, despite the great effort involved in entering and verifying the records, as it would facilitate quantitative analysis of the data. The book of summary sheets provided an independent means for manually cross-checking every entry into the computer database.

C.3 DATABASE FILES

Commercially available database software (dBASE III by Ashton-Tate) was initially tailored to the project by a specialist who set up an individual file for each participant. The interchange sheet format defined the main fields in the database, and additional fields were then added for entering activity and design-related technique codes. There were 3 working modes: <u>INPUT</u> mode - for entering data, project phase and hourly charge rates. EDIT mode - for editing individual files and adding categorizing codes. ANALYSE mode - for running the sorting, browsing and calculating routines. It was thought that when the data had been entered into the computer, and had been checked against the summary sheets, it would be possible to enter classification codes for the activities and design-related techniques, then analyse the data accordingly. Although in the end this was done, a two-month effort was first required to remove inconsistencies and errors from the data. Whereas in dealing with the data sheets manually, an error of say 0.1 hour for one participant in a particular interchange was of little consequence, it was unacceptable in the computer database. The

computer would regard this as two separate interchanges and adjust everything accordingly. This became obvious once the decision had been made to use a computer, but at the stage where there were doubts as to what constituted an interchange in the first place it was not obvious. Much of the later research effort went into developing techniques for systematically linking, checking and cross-checking the data to produce a satisfactory working database. Such problems could have been greatly reduced if it had been possible to collect the field data on standardized sheets and enter it directly into a computer.

C.4 REDUCED DATABASE FILES

Once the main database had been 'debugged' it was possible to use the dBASE III indexing, sorting and summarizing facilities to create summary files concerned only with specific aspects such as hours per person per month and techniques used during each activity. The volume of the main database including all fields was 438467 bytes. From this a reduced one of 281659 bytes was derived, and this was indexed by date, person, type, phase and 'mood' to give some trial results. This in turn led to a third database which had additional key-fields for indexing by month, activity, design-related technique and combinations of these. It was this third one which became the master database from which all final tables and graphs were derived, and its volume was 336523 bytes (one 5.25 inch floppy disc). The database had been installed on a personal computer with a 10-megabyte hard-disk drive (IBM 3270 or PC XT), and by the time the necessary index files and summary files had been created, between 5 and 8 megabytes of the available disk storage was in use. File management became complicated, despite frequent 'clean-ups', and backing-up the files required a lot of manipulation and care. The main reason that so much file storage was required was that although the dBASE III package could produce the summary files it had no facility for converting these to an appropriate tabular or graphical form. The summary files had to be translated for use in another software package installed on the same hard disk, as discussed in the next section. The complete set of files and software was backed up on 9 floppy disks, and extra back-ups were made of master files.

C.5 TABLES AND GRAPHS

To produce tables for comparison with those of Pahl and Beitz, and graphs to show other results, it was necessary to translate the summary database files into 'spreadsheet' files using other available software. The Lotus 1-2-3 database, spreadsheet and graphics (combined) software package was chosen for the final data processing, after trials with other packages. Although the database facilities of this could not cope with the main data files, it could handle the summary files, which were then manipulated into the tabular formats required. This was by no means an automatic procedure, and considerable effort went into devising suitable formats including expressions for calculation of totals, percentages and means. However, once this had been done it became comparatively easy to analyse the results from various angles. Preliminary results were produced using dot-matrix printer, the final tables with an ink-jet printer and the final graphs with a flat-bed plotter. The complete set of spreadsheet files was backed-up on 8 floppy disks and additional back-ups were made of the master files.

C.6 CONCLUSIONS

- (i) A manual method of reducing the raw field data by a factor of 20 in volume was developed. It resulted in Interchange Data Sheets with data in a form suitable for entry to a computer database.
- (ii) Commercially available software was suitable for handling the data. Its use resulted in an overall data reduction of 24 by volume and the generation of summary tables and graphs.
- (iii) By use of a computer the complete history of the 2.8 year project could be summarized on 24 data sheets (Appendix A.1), and the 2368 hours of work from 37 people could be detailed in a single table (Figure 2-14).
- (iv) The master database for the project could be stored on two standard floppy disks, allowing easy transfer between computer systems.
- (v) Most of the analysis effort was spent in checking and crosschecking the Interchange Data Sheet and computer database records.
- (vi) If data could be collected using Interchange Data Sheets, then fed directly into a computer for analysis, most of the problems of data handling could be overcome and research time would be reduced.

KEY TO PARTICIPANT CODES - GTR PROJECT

FUNCTIONAL GROUP	PARTICIPANT	COLOUR CODE	COMPUTER CODE	NUMBER OF INTERCHANGES				
DIRECTORS	Director G Director R Assistant Director 1 Assistant Director 2	GR 12	D_G D_R AD1_R AD2_R	8 7 5 11				
MANAGERS	Manager A Manager S Assistant Manager A Assistant Manager S	1 2	M_A M_S AM_A AM_S	58 22 154 60				
RESEARCH STAFF	Section Leader A Section Leader P Assistant Section Leader Researcher 1 A Researcher 2 A Specialist 1 A Specialist 2 A Specialist 1 P		SL_A SL_P ASL_A R1_A R2_A S1_A S2_A S1_P	212 17 35 81 68 18 7 14				
SERVICES STAFF	Building Projects Officer Services Officer Design Engineer Draughtsman Graphics Illustrator	1 2 1 2	BPO_S SO_S DE_S DR_S GI_S	40 4 133 65 27				
REMOTE SUPPORT STAFF	Coordinator G Quality Assurance Officer Safety Officer Design Engineer 1 M Design Engineer 2 M	CO S M X	C_G QAO_H SO_H DE1_M DE2_M	3 7 4 11 1				
CONTRACT STAFF	Contract Design Engineer Contract Controls Engineer Contract Detail Designer	12	CDE CCE CDD	1060 96 101				
SPECIALIST SUPPLIERS	Sales Engineer - Feeders Sales Engineer 1 - Valves Sales Engineer 2 - Valves Sales Engineer - Vessels Sales Engineer - Flow/Gen.	1 2 3 4 +5	SE_FE SE1_VA SE2_VA SE_VE SE_FL + G	22 12 7 8 37				
UNIVERSITY SUPPORT	Project Monitor - CUED Liason Officer - CUED Design Engineer/s - CUED	RM_U LO_U DE_U	49 21 6					
	OTAL OF 37 PARTICIPANTS TOTAL 2488							
TOTAL HOURS	2368.6 TH OF EACH INTERCHANGE = 0.9	5 HOURS						

Figure C-1 Colour Codes and Computer Codes for Participants: Gasifier Test Rig Project

PRO	JECT :	Gr	ASIFIER	2	TEST RIG		DATE: 2/5/86
PAR	FICIPANT	: COM	ITRACT DE	ESI	GN ENGINEER (CODE:	SHEET 11 OF 22
INTE	RCHANG	ES		L			
No.	DATE	HRS	TYPE	OC.	TOPIC	MOOD	REMARKS
501	1984) 9/4	0.2	M-3	D	General on dwgs,	Questioning	Buyo versus metric.
502	9/4	0.9	W-2	D	Stoel vessel frame	Mogent 1	checked duy dims.
503		0.5		D	Graphical symbols	Urgent	Copy of std. for CCE
504			M-3	D		~ // € /	
505	9/4		M-2	0			
506	10/4		Tt	0	KF	EV TO	SYMBOLS
507	10/4		L-A	0			
508		6.5		0	TUDE (A., 1.,	CDE
509	11/4	0.9	the second secon	T			ANGES INVOLVE CDE
510		0.2	M-2	0			V-1 OR WHERE ANOTHER
511	11/4		M-3	D		PARTICIPANT IS	5 INDICATED IN TYPE COLUMN)
512			W-3	D			
513	11/4	0.6	m-3	C	M = Meet	ting (formal	ar informal)
514		1.5	W-3	D	W = Work	ing (tormat	St. (nd.) mat ()
515	11/4		W-2	P			
516	ħ/4	0.1	m-3	D 0"		phone Call	
517	11/4-	1.2		L	L = Lette		
		1.3	W-2 M-2	0	N = Note		
519	11/4		M-2 TA	+	- = more	- than just .	nomentary
520	12/4		W-1	0	+ = Outg	aina	J
522	12/4		W1	0	L J		
523	13/4			F	V = Incom	ning	
524	13/4		m2	P			
525	13/4		1	D	Examples:		
526	13/4		M-2	D		M-3 = n	reating with 3 people present
527	/ /		W-1	D		W-1 = W	look done alone
528	13/4	0.9	m-3	C		TI = Sh	ort incoming phone call. ort verbal interchange with people present.
529	13/4		m-2	D		M4 = Sh	ant under interchance with
530	13/4	1.8		0			or voron mierchange with
531		0.8	M-2	Ő			people present.
532	154	2.0	W-1	H	LOCATION	15	
533		0.1		0			
534	16/4	0.9	W-1	T	0=0=0 when o	office (of par	ticipant) D=D = Drawing Office
535			W-2	D	N=0' = Office	with others or	esent T=T= Travelling
536			L-+	D	(+ working on a	TR) (train bure ot)
537			m2	0"	A - A" - Same	ales's phi	TR) (train, bus etc) e B=Li=Librany
538	16/4	0:3	W-1	C	n-U - someon	ne erses out c	(1) - Ila
539	16/4	3.8	W-1	D	R = R = Confe	ronce room	sage H= {H = Home Ho = Hospital.
540	16/4		mz	0	P=P = Corrio	lor / Lobby / Pass	
541	16/4		W2	L	L=L = Lab.	(L'= others la	b.)
542	16/4		Tł	D	E=E = Outou	de the building	s area.
543		0.2	T-A	0"	C=C = Cafet	eria/Canteen.	가장 이 이 것 같아요.
544		0.1		0"	allow no cel	1 Juni 1900	copy of war from C.D.C.
545			L-1	0"	Letter to CCE	Neutral	Copy for SL-A
546		0.1		0	Visit to m	Enthusiastic	Visit on 18/4 to M.
547		and the second second	W-1	0	Prep. for visit tom		Durgs & proj description
548			m-2	E	General discussion		Project organization Demonstration by M
549			W-1	E		Pleased	Demonstrations by M
550	15/4	0.2	M2	10	Project progren	Enthusiastic	D. G gave dwg to another eng

Figure C-2 Sample Interchange Data Sheet

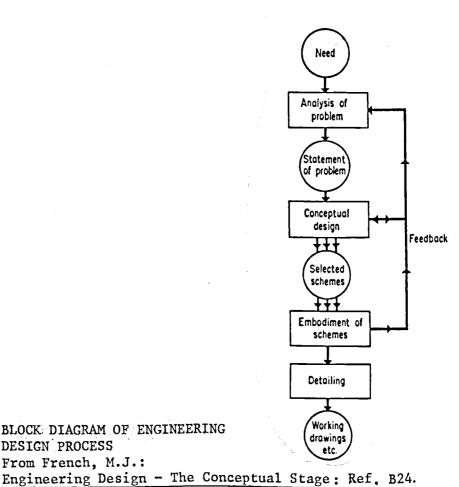
.

- C 7 -

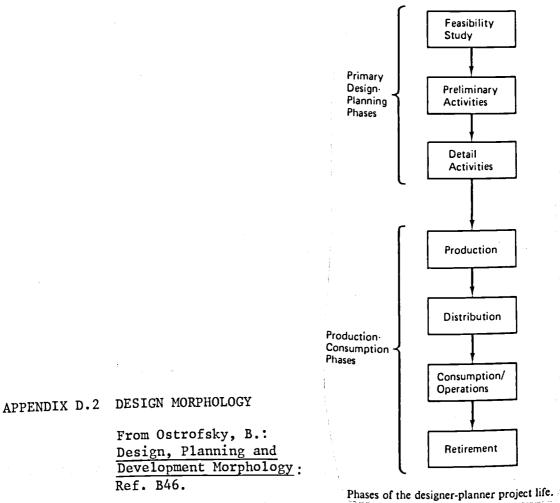
APPENDIX D

DESIGN PROCESS MODELS

- D.1 FRENCH
- D.2 OSTROFSKY
- D.3 PAHL AND BEITZ
- D.4 PUGH AND SMITH
- D.5 EHRLENSPIEL
- D.6 BESSANT



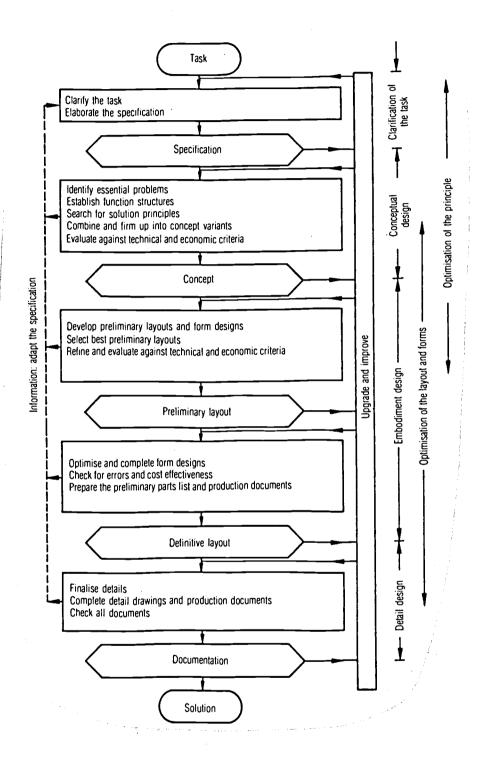
APPENDIX D.1 BLOCK DIAGRAM OF ENGINEERING DESIGN PROCESS From French, M.J.:



- D 2 -

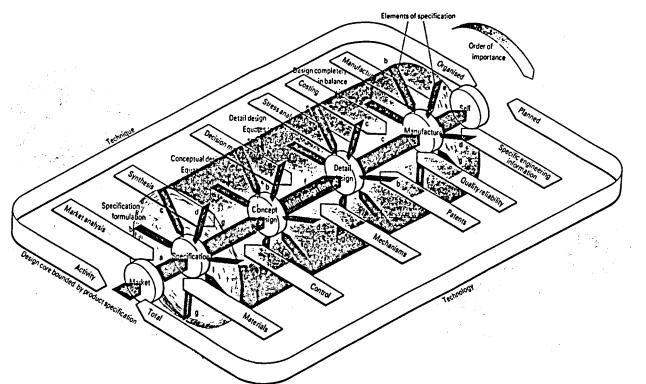
Ref. B46.

.

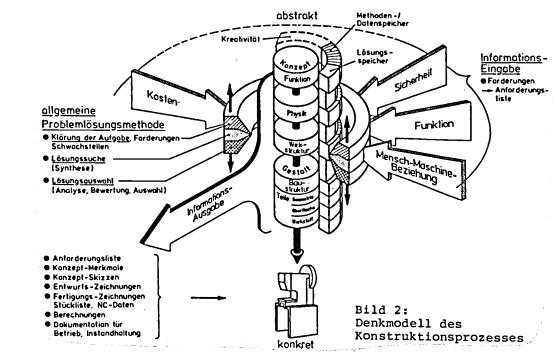


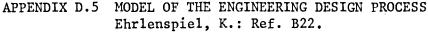
APPENDIX D.3 STEPS OF THE DESIGN PROCESS

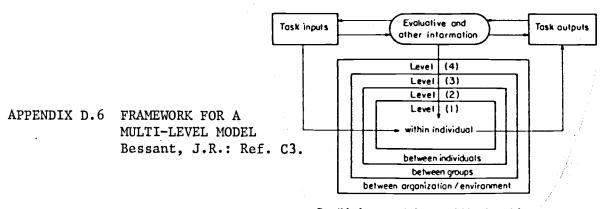
From Pahl G. and W. Beitz: Engineering Design. Ref. B48.



APPENDIX D.4 DESIGN ACTIVITY MODEL - Pugh, S. and D.G. Smith: Refs. B52 & B54,







Possible framework for a multi-level model