

PROCESSVUE ISA-18.2 IMPLEMENTATION CHECKLIST

Apply ISA-18.2 principles using ProcessVue tools with a practical, step-by-step action plan.

The ISA-18.2 standard defines what effective alarm management should look like. ProcessVue gives you the tools and structure to make it happen. Helping you design, document, operate, and sustain a compliant, high-performing alarm system.

Use this checklist to assess where you are in the lifecycle and identify the next steps toward full ISA-18.2 alignment.

1. Define your Alarm Vision

Objective: Define how alarms are created, prioritized, and maintained.

Checklist:

- Create or review your site's alarm philosophy document.
- Define clear rules for alarm purpose, priority, and response.
- Set measurable performance targets (KPIs) for alarm rate, floods, and standing alarms.
- Communicate and apply standards consistently across all assets.

ProcessVue Helps You:

- Embed philosophy logic directly in Guardian via the priority matrix and impact/severity guides.
 - Apply consistent prioritization and response expectations automatically.
 - Track KPI performance targets through Analyser dashboards.
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2. Discover and Prioritize Events

Objective: Determine which process conditions truly require alarms.

Checklist:

- Review process data to identify conditions that need alarms.
- Eliminate notifications that do not require operator action.
- Document justification for each proposed alarm.

ProcessVue Helps You:

- Use **Guardian** forms to capture alarm cause, consequence, and required operator response.
- Support evidence-based identification using historical alarm trends from **Analyser**.

3. Rationalize and Optimize

Objective: Review, justify, and approve every alarm.

Checklist:

- Conduct rationalization sessions using a structured workflow.
- Define or verify alarm priorities, setpoints, and response actions.
- Document decisions, approvals, and reviewers.
- Standardize across similar assets using templates and copy tools.

ProcessVue Helps You:

- Manage collaborative rationalization sessions in **Guardian**.
 - Use **bulk edits**, **templates**, and **copy-one-to-many** functions to ensure consistency.
 - Maintain a full audit trail of approvals and decisions.
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4. Engineer and Configure Solutions

Objective: Configure alarms according to philosophy and best practice.

Checklist:

- Review configuration data exported from your control system.
- Check setpoints, priorities, and delays for compliance with design standards.
- Ensure consistent naming conventions and documentation.

ProcessVue Helps You:

- Import and store all alarm configurations in **Guardian's** searchable database.
- Review configuration metrics such as total alarms and **priority distribution**.
- Access similar configurations for guidance and alignment.

5. Deploy and Integrate

Objective: Deploy and verify alarms in control systems.

Checklist:

- Export approved alarms for loading into DCS/SCADA.
- Review configuration differences between approved and live systems.
- Validate that all changes are reviewed and approved before deployment.

ProcessVue Helps You:

- Generate Change Reports in Guardian to list configuration differences (added or modified).
 - Track approvals and implementation sign-offs for governance.
 - Use Analyser to confirm that new alarms perform as designed once live.
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6. Operate and Observe

Objective: Ensure alarms support effective operator performance.

Checklist:

- Monitor operator alarm loads and flood events.
- Ensure alarm messages are clear and actionable.
- Capture operator feedback for continuous improvement.

ProcessVue Helps You:

- Use **Analyser** dashboards to view alarm rates, floods, and response times in real time.
- Provide alarm context and guidance through **Guardian's** stored metadata.

7. Maintain and Sustain

Objective: Keep alarm configurations accurate and functional.

Checklist:

- Regularly check for stale, disabled, or chattering alarms.
- Update configurations when equipment or process changes occur.
- Ensure maintenance changes are reviewed through MOC.

ProcessVue Helps You:

- Track configuration drifts through regular **Guardian** imports.
 - Identify recurring issues or poor performers via **Analyser** trends.
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8. Analyze and Benchmark

Objective: Measure alarm system performance.

Checklist:

- Calculate alarm system KPIs regularly.
- Compare results against ISA-18.2 benchmarks.
- Identify and investigate problem areas.

ProcessVue Helps You:

- Access **configuration metrics** (number of alarms, priority distribution) in **Guardian**.
- Review all **ISA-18.2 performance metrics** (alarm rate, floods, standing alarms, operator response) through **Analyser** reports.

9. Improve Alarms

Objective: Control and document all alarm system modifications.

Checklist:

- Record every change, reason, and author.
- Require approval and sign-off before implementing changes.
- Maintain a version history for each alarm.

ProcessVue Helps You:

- Manage all change requests, approvals, and version control through **Guardian's MOC workflow**.
 - Evaluate post-change alarm behaviour using **Analyser** to ensure improvements are effective.
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10. Record and Audit

Objective: Verify compliance and support continuous improvement.

Checklist:

- Conduct regular audits of alarm performance and configuration.
- Produce compliance reports and KPI summaries.
- Review and update your philosophy and procedures as needed.

ProcessVue Helps You:

- Generate **audit-ready reports** in **Guardian** detailing rationalization, change history, and approvals.
- Use **Analyser** to provide KPI trend evidence for audit reviews and management reporting.



READY TO START YOUR ISA-18.2 JOURNEY?

Following ISA-18.2 doesn't need to be complex. With **ProcessVue Guardian** and **ProcessVue Analyser**, you can implement every lifecycle stage efficiently, building a safer, more consistent, and fully auditable alarm management process.

Talk to an expert

Discover how to align your operations with ISA-18.2

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