TOGA® Web Site Instruction Manual - Client

Intro to the New and Improved TOGA® Web Site

The new TOGA® web site is an effort long in the making and we hope we have been able to address many of the concerns we've heard over the past two years. The new site has increased speed and efficiency. Information can be quickly updated and reports can be accessed directly through the site. This is the first phase of our new site and there are many additional features still to come. We greatly value your input and feedback, so we hope to hear from you via e-mail at toga@hsb.com

New Site Map - Overview

TOGA Home Page – www.hsbtoga.com
 About TOGA
  The HSB difference – why choosing HSB means choosing a partner in asset management
  Why test? – some facts on the importance of transformer oil testing
  Types of tests – detail on the different tests offered through TOGA®
  What the results tell you – infor on different problem conditions within transformers
  Case studies – interesting examples of HSB in the transformer industry
 Helpful Info
  Site instructions – contains a link to THIS manual
  Sample procedure – detailed information on drawing your oil samples
  Help Videos – links to "mini movie" files on "How To…" for things you do in TOGA®
 Contact Us
  Email TOGA® Admin – link to send a message to toga@hsb.com
  Hartford Steam Boiler Home Page – link to HSB's Home Page
  Toll Free Number – listed here for easy contact to the TOGA® administrative staff
 Access Your TOGA Account
  Login ID and Password required for Access to YOUR data
  Ticklers for Password – Password Hint, e-mail password, e-mail login ID and password

Once you have logged in, the "About TOGA", "Helpful Info" and "Contact Us" information remains. In addition the menu choices below also become available:

 Helpful Info *(2 more choices are ADDED to those listed above)*
  Problems with your order – Link to send information about order issues
  Purchasing spare syringes – Link to send information required to buy syringes
 Workbench
  Unit – contains detail on ALL units you have listed with TOGA® for your account
  Location – contains detail on ALL locations for your account
  Contact – contains detail on all individuals who have access to your account
  Lab Order – contains detail on all recent lab orders shipped to you
  Report Order – contains detail on all of your current sample report activities
 Actions
  View My Profile – link to your personal contact and login information
  Add Unit –add a unit to the TOGA® system for your account
  Search – search for older lab orders and reports
  Edit Customer Organization – link to your company's profile. Can edit high-level detail
  Add Location – add a new location to the TOGA® system
  Add Contact - add a new contact to your account, (shipping or business)
 Log out – be sure to click here when you are done using TOGA®

Quick Start – Procedures
- Log onto WWW.HSBTOGA.COM using provided TOGA User ID and password.
- Select "Edit Customer Organization" or "Contact" tab to check shipping contact and address.
- View your Organization's information via workbench tabs or menu selections.
- Contact us with any questions at TOGA@hsb.com

Getting Started – Logging In

Once you receive your login information for accessing the secure portion of the Hartford Steam Boiler's TOGA® web site, you are ready to begin working with your customized account. Login to your account using the information supplied in your Welcome to TOGA® e-mail.

After login, the first step in this process is to ensure that your profile information is correct. In the "Actions" Menu there is a choice entitled "View My Profile". Check this information to make sure a complete and accurate profile is listed for you. The "Notifications" section allows you to specify which e-mail notifications you would like to receive from TOGA® regarding the status of your account. The recommended notifications are defaulted into this section. You can modify which notifications are selected by "Removing" the notifications. Be sure to change your password to something you will remember. To help ensure this, set up a password hint – something to remind you of your password when you return again to the TOGA® site

** On the home page under the login there are 3 options to help remind you of your login information.

Email My Password (you must enter your login ID first)

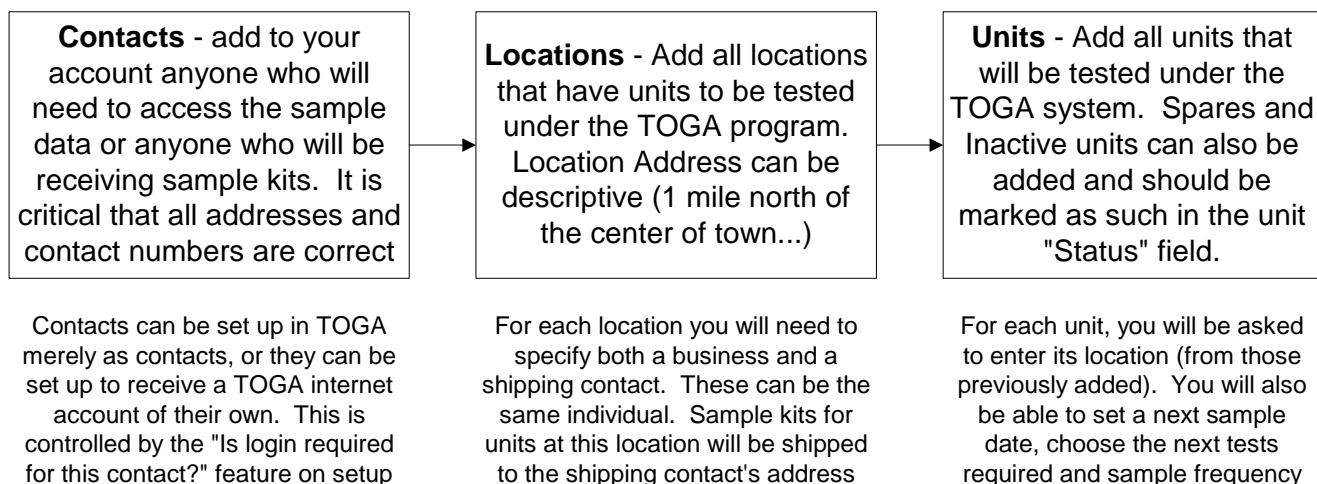Display My Password Hint (you must enter your login ID first)

I forgot my Login ID and Password.

If you know your login ID, type it into the Login ID field and click on "Display My Password Hint". If you entered the correct login ID and you added in a password hint on your contact profile, your password hint will appear on the screen to try to jog your memory. If you still don't know after checking your password hint, choose the option of having your password e-mailed to you. If you choose this option and get a message saying that the login ID you entered is invalid, go back and use the final option to have BOTH your login ID and password mailed to you. In order to use this option you will be asked to enter the e-mail address you have on file with TOGA®.

Adding Information

Process Flow

Information has been set up to establish your TOGA® account in the system. This basic information allows you to add specifics such as other contacts, locations and units that need to be tested. Information should be added in the following order for data entry.

| **Contacts** - add to your account anyone who will need to access the sample data or anyone who will be receiving sample kits. It is critical that all addresses and contact numbers are correct	**Locations** - Add all locations that have units to be tested under the TOGA program. Location Address can be descriptive (1 mile north of the center of town...)	**Units** - Add all units that will be tested under the TOGA system. Spares and Inactive units can also be added and should be marked as such in the unit "Status" field.
Contacts can be set up in TOGA merely as contacts, or they can be set up to receive a TOGA internet account of their own. This is controlled by the "Is login required for this contact?" feature on setup	For each location you will need to specify both a business and a shipping contact. These can be the same individual. Sample kits for units at this location will be shipped to the shipping contact's address	For each unit, you will be asked to enter its location (from those previously added). You will also be able to set a next sample date, choose the next tests required and sample frequency

Contacts

The first step in setting up your account is to add any other contact individual's that will need to participate in the management of your account. To start, check who is already listed as a contact for your account by clicking on the Contact Workbench. This workbench can also be accessed using the "Workbench" menu and selecting "Contact". This screen will list all of the contacts for your account. By clicking on a contact name, you can view the information in that contact's profile:

Your Account: **Customer Org Example B / 5439651**

Contact Information:

Unit	Location	**Contact**	Lab Order	Report Order

Contact Name	Phone Number	Fax Number	Address	Email	User Status
B Example Contact	1-877-610-4128		Hartford, Connecticut	toga@hsb.com	Active
B Example Shipping	860-722-5623	860-722-5260	Hartford, Connecticut	sarah_rudnicki@hsb.com	Active

Check contact list and added any missing contacts. Remember, your list should include shipping contacts as well as business contacts. If shipments need to be addressed to a particular individual, that individual will need to be added to TOGA®. To add a contact, go to the "Actions" menu and select "Add Contact".
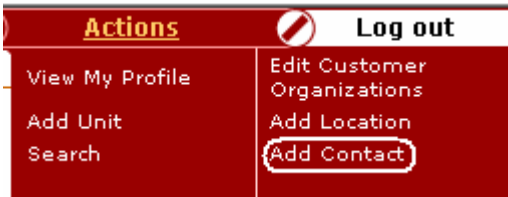
Complete all of the information in the "Contact Profile" section, the "Phone/Fax Numbers" section. To set up the new contact's access to information click on the "New" button in the "Organization and Location Access Information" section. That will display a new window listing all of the organizations and locations YOU have access to. You can grant a new user access to all or some of the information you have access to. If you want them to have access to ALL of your locations, check the box below your customer Organization and click "Save". To restrict the new contact to a few locations, just click on the locations in the section below the Customer Organization that they SHOULD have access to. (Use the Shift or Control keys to select multiple locations). Click "Save".

If the contact you set up does NOT require a login ID, remove the check box from the "Is a login required for this contact?" If you want the new contact to be able to access the TOGA site, leave this box checked and click "Save". A message will be sent to the E-mail address provided for the new user containing their login ID and password (if one was required).

Locations

The second step in setting up your account is adding the locations that will be involved in the testing process. Before adding any new locations, be sure to check your Location Workbench to see which locations are already listed for your account. You may need to check on existing locations to ensure that the information is accurate. Click on the Location Workbench Tab to access this area or go to the "Workbench" menu and select "Location".

Short Cuts:

Select one or more units and click desired action.	⬆ Change Location Contacts	Change Location Statuses	Change Fixed Date

Unit	Location	Contact	Lab Order	Report Order				
Select All	Location Name ▲▼		Location Number ▲▼	Status ▲▼	In Plan ▲▼	Business Contact ▲▼	Shipping Contact ▲▼	Fixed Date ▲▼
☐	**Substation Four**		0004	Active	no	Contact, B Example	Contact, B Example	
☐	**Substation One**		00001	Active	yes	Contact, B Example	Contact, B Example	
☐	**Substation Two**		00002	Active	yes	Contact, B Example	Contact, B Example	
☐	**Substation Three**		00003	Active	yes	Contact, B Example	Contact, B Example	

Click on the location name to open the detail information screen for that location. You can also click on the contact name (either one) to open the contact profile for that individual. Clicking on the Contact name in the Shipping Contact column will allow you to see the address where sample kits for units at that location will be shipped. Sample kits are shipped to a customer profile shipping address and not to the location address.

There are 3 short cuts on the Location workbench that can be used to quickly update Location data. These short cuts can be used on MULTIPLE locations by selecting the locations in the checkbox to the left of each location name. The short cuts perform the following actions:

- ➢ **Change Location Contacts**: Allows you to select from all available contacts new business and or shipping contacts for any locations selected
- ➢ **Change Location Statuses**: Allows you to change all selected locations to a status of either Active OR Inactive (effects sample kit shipments)
- ➢ **Change Fixed Date**: Allows you to change or set a fixed sample date for all units at a particular location. This is a DATE (June 15th) during the year that sample kits will be scheduled for on behalf of ALL of the units at that location regardless of other sample dates. *Please note that each unit contains a unit specific sample date field as well.*

After reviewing and updating your existing locations, you may need to add other distinct locations that house units to be tested. From the "Actions" menu choose "Add Location".

Actions	⊘	Log out
View My Profile		Edit Customer Organizations
Add Unit		Add Location
Search		Add Contact

Complete the information for each location. Be sure to select the correct contacts for business and shipping. All packages will be shipped to the address of the person listed as the shipping contact for each location. The "Fixed Date" field is available on this screen as well if you would like to enter a month and day combination that you would want ALL units at this location to be tested on every year. The fixed date is NOT a mandatory field.

Units

Once contacts and locations are set up for your account, you are ready to enter your unit information. The unit is a critical element to the TOGA system. All testing and reporting is based on the information contained within each unit record. Before adding any new units, check your Unit Workbench to see what units are already in the system for your account. Access the unit workbench either by clicking on the "Unit" tab or by selecting "Unit" from the "Workbench" Menu.

The unit workbench is your primary working screen and it contains much of the information that you need to manage your assets. You can click on the location to access the location profile for that unit. You can click on the location contact to access the contact profile for the individual assigned as that location. You can click on the unit serial number to access the unit information. For older units, you can click on the last sample date to view the last available TOGA report for that unit. The Next Sample Date, Report Order Status, and Next Test columns tell you about what's going to happen from a testing standpoint for that unit in the future.

The "Unit" Workbench contains a listing of all of the units in the system for your account. The Unit workbench has several useful "short cut" options to allow you to make edits on existing units quickly and consistently. The shortcuts can all be used on one or many units by checking off (to the left of the Serial Number) the units that you desire to edit. The short cut options are:
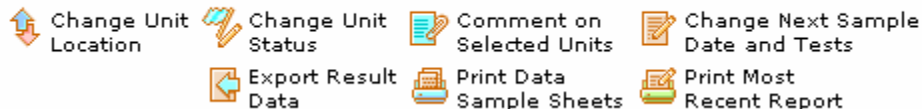
- Change Unit Location allows you to move one or more existing units from one location to another
- Change Unit Status allows you to change the status of one or more units to a different status (active, spare, etc.)
- Comment on Select Units allows you to enter a comment on one or more selected units
- Change Next Sample Date and Tests allows you to set the next test date, test reason and tests desired for selected units.
- Export Result Data exports the MOST recent test result data for the selected units as a comma separated filed
- Print Data Sample Sheets allows you to print out a data collection sheet for the selected units

- • Print Most Recent Report will print out the most recent approved TOGA report for the selected units

In the example below, two units are selected. If a short cut option is used at that point, the action will be taken on the two units marked with checkboxes below. A "Select All" button has been added to allow you to quickly select ALL of the units on this screen. You can remove a unit from being selected by clicking in the checkbox. That will remove the check and deselect that unit.

After checking all of your existing units to ensure that they are correct, you may still need to add additional units. To add units, select the "Add Unit" option from the "Actions" menu.


Every unit MUST have a distinct Serial Number. Complete as much of the information as possible. Mandatory fields are marked with an "*". The "Last Sample Information" section will be blank for new units. Please, complete all other sections. The information entered in the "Next Sample Information" section starts the sample kit ordering process. Please be sure to fill in accurate information. The default date suggested in this section for new units is a date that will be picked up in the time frame for our next routine sample shipment. Be sure to choose EMERGENCY in the "Reason" field if you need to have a sample kit RUSHED to you for testing.

If you are adding a series of SIMILAR units, use the check box at the top or bottom of the screen before clicking "Save". You can also use this function to base a new unit on an existing unit. Click on the serial number of the desired template unit in the unit workbench and it will bring up the unit profile. Click on the check box and click on the "New" button. This will open an almost complete new unit form that requires a new unit designation and serial number but has all other information pre filled. This feature is a great time saver when adding a series of like units.
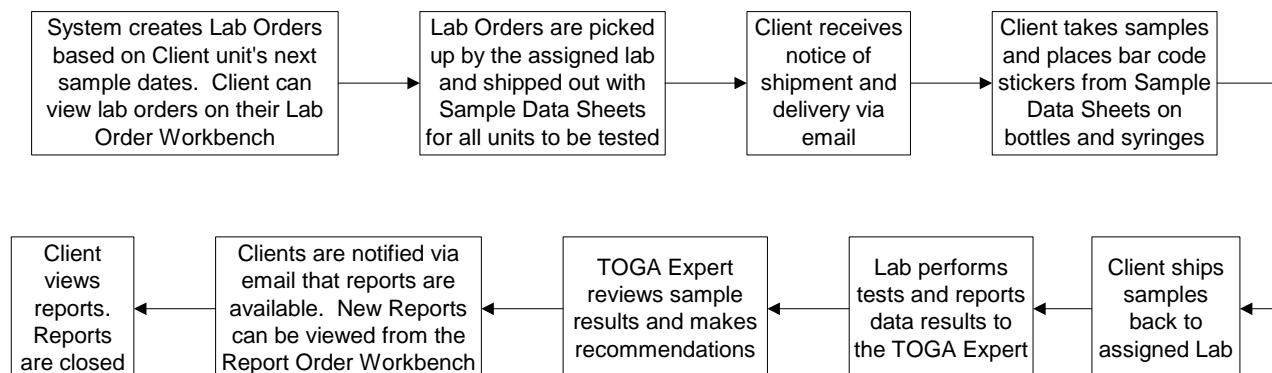
Hints for adding units:

- Sample kits are ordered two - three weeks PRIOR to the date listed as the next sample date. The routine orders will be placed weekly on Mondays. For Example:
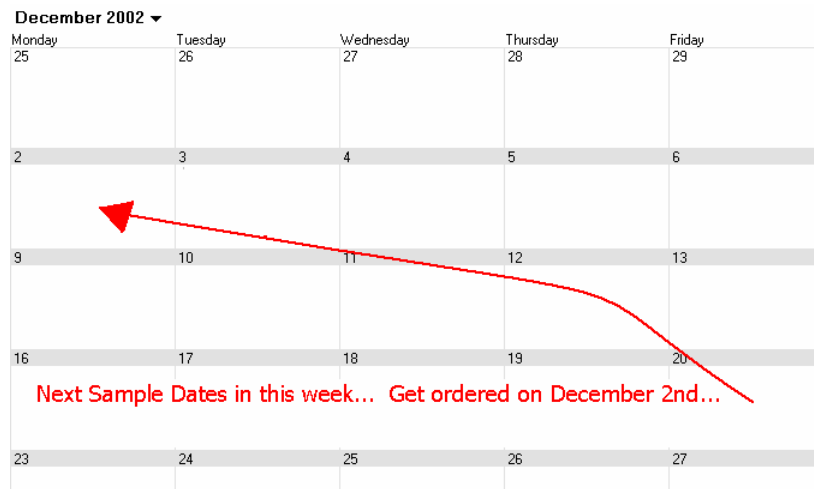
- If a location is marked as inactive, all units at that location are also marked inactive
- Units with a status of "Active- on Demand" will not have sample kits ordered UNLESS you change the next sample date for the unit (sample kits will not be sent based on recommendation from TOGA expert alone)
- Only units with statuses of "Active" will be shipped routine sample kits. Units in a status of "Spare" will be shipped kits to test moisture only
- The unit status "Removed" is to be used ONLY if you are getting rid of a unit – Selling or Retiring are the main uses of this status. Once "Removed" you will no longer have access to that unit.

Getting Your TOGA Reports

Report Order Process

| System creates Lab Orders based on Client unit's next sample dates. Client can view lab orders on their Lab Order Workbench | → | Lab Orders are picked up by the assigned lab and shipped out with Sample Data Sheets for all units to be tested | → | Client receives notice of shipment and delivery via email | → | Client takes samples and places bar code stickers from Sample Data Sheets on bottles and syringes |

| Client views reports. Reports are closed | ← | Clients are notified via email that reports are available. New Reports can be viewed from the Report Order Workbench | ← | TOGA Expert reviews sample results and makes recommendations | ← | Lab performs tests and reports data results to the TOGA Expert | ← | Client ships samples back to assigned Lab |

Lab Order Workbench & Detail

Once a Lab Order has been created in the TOGA System, you will be able to view the details from your Lab Order Workbench. This work area contains all open Lab Orders. Open Lab Orders are those that have been newly ordered, those that are at the lab - preparing to ship out and those that have been shipped to you. Once TOGA receives notice from the shipping carrier that you have received a lab order, it is considered closed and will no longer appear on the Lab Order Workbench.

Filtered By:

Lab Order Status: Ordered ▼   Date Ordered: From (mm/dd/yyyy) [   ]   To (mm/dd/yyyy) [   ]

▼ Apply Filter   [Back]

| Unit | Location | Contact | **Lab Order** | Report Order |

[Select New Orders]		Lab Order Number ▲▼	Lab Number ▲▼	Order Date ▲▼	Order Status ▲▼	# Syringes ▲▼	# Bottles ▲▼	Ship to Contact ▲▼	Shipping Carrier ▲▼	Tracking Number ▲▼	Ship Date ▲▼
	☐	2643	1301	08/16/2002	Ordered	9	0	123, 123	UPS	1Z0286310395949920	
	☐	2651	1301	08/19/2002	Ordered	2	2	123, 123	UPS	1Z0286310395074802	

You can click on the Lab Order Number to view the details of the Lab Order. These details included ship to information, information on the units covered in the Lab Order, and information on shipping; tracking number, shipping carrier and shipped date. Once the package is delivered, the "received date" and "received by" fields will also be filled in.

The Lab Order Workbench will help you keep track of sample kit shipments on their way to you. You can click on the Tracking Number listed on the Lab Order workbench screen to view real time tracking data from the Shipping Carrier website.

Report Order Workbench & Detail

A lab order is composed of one or more report orders. A report order is generated based off of the unit's next sample date for active units. As a next sample date approaches, the TOGA system determines that an order for that unit needs to be placed and creates a Report Order. Report Orders going to the same individual in the same time frame are grouped into a Lab Order. The Report Order

workbench is your PRIMARY screen for viewing the results of an oil sample. During the time between when the report order is created and when the results from the sample are approved, you can use this screen to know which of your units are in the TOGA testing process.

The Report Order workbench only shows ACTIVE report orders. This includes all report orders from the time they are ordered until you have reviewed the result of the sample. Once you view the sample results, the report orders will be removed from the Report Order Workbench – UNLESS you keep them as "New" on the report order detail screen. If you are looking for historical report information, use the handy SEARCH feature. For current Report results, use your Report Order Workbench.

There are two shortcuts on this screen to increase efficiency. In order to utilize them, you must have reports that have been approved by the TOGA Expert. These functions – "Print" and "Export" allow you to extract the sample result information from the TOGA system. To use these functions, simply check off the units / report orders that you are interested in and then choose either "Print" or "Export". Print will open a file on your screen containing the most recent sample report results for the selected units in a printable fashion. Export will allow you to download a comma separated file containing report results data.

To view your results on screen, click on the Report Order ID. This will open a report order detail screen with your results. Results from up to 5 past tests will be listed along with the most current test results. You will be able to view the TOGA Recommendation as well as the unit's condition code.

If a Report is listed with a status of "Follow-Up Required", the TOGA Expert is looking for you to indicate what action will be / has been taken on the unit to address the condition that was noted on the report. You should enter information on what was done in the "Client Comment" area of the Report Results (directly below the TOGA Recommendation). This information will be communicated to the TOGA Expert and will also be stored on file with the TOGA Report.

* Please Note * only report orders with approved sample results can be viewed. If the report order status is "Results Approved", "Requires Follow-Up", "Reviewed by Client" or "Complete" you will be able to access the actual report results. All other statuses indicate that work is still being done on your sample and that the results are not yet available.

Sample Report

Company Name: dave & Als third org
Location Name: loc 1
Location Address: 1 state street
Location City/State/Zip: hartford , CT , 06102
Serial Number: abc123-1
Unit Designation: Test Unit
Equipment Type: Transformer
Manufacturer: C.E.E.S.A.
Year Built: -66
Voltage (KV)(Pri/Sec/Ter): 2 / 3 / 66.66
Size (MVA)(Pri/Sec/Ter): 4 / 0.9 / 99.99
Cooling: FOW
Oil Volume: 5
Oil Preservation Method: Breather
PCB Contamination: Yes

Additional Email Address:

Tests: DGA, Screen, Moisture
Next Sample Date:
(mm/dd/yyyy) 08/19/2002
Sampling Frequency: Annually
Reason: Routine
Dollar Amount Saved: 0
Maintenance Repair Savings: 0

Comments for Email:

Follow-up Required: ☐
Condition Code: 0
Keep as New:
Outage Avoidance Savings: 0

Report Order ID: 84547
Report Order Status: Complete
Sample Date: 07/17/2002
Baseline: ☐
TOGA Recomendation: looks good.
Client Follow up:
Current and Previous Sample Report Results
Condition Code: 0
Sample Received Date: 07/17/2002
Sample Processed Date: 07/17/2002
Sample By:
Gas Pressure (psig): 1
Max Temp by Ind(°C): 58
Temp at Time of Sample(°C): 48
Ambient Temp(°F): 20
Sample ID: 76503
Dissolved Gas Analysis
Hydrogen, (H_2), ppm: 19
Oxygen, (O_2), ppm: 4637
Nitrogen, (N_2), ppm: 40339

Methane, (CH_2), ppm: 23
Carbon Monoxide, (CO), ppm: 125
Carbon Dioxide, (CO_2), ppm: 1322
Ethylene, (C_2H_4), ppm: 2
Ethane, (C_2H_6), ppm: 21
Acetylene, (C_2H_2), ppm: 3
Combusible Gas, ppm: 193
% of Gas in Oil by volume: 5
TCG est. in the gas space: 0
Screen Tests
Dielectric Breakdown, KV: 62
Specific Gravity: 1
Color: <1.0
Acidity, mg KOH/g: 0
Interfacial Tension, dynes/cm: 36
Power Factor @ 20 °C %: 0
Power Factor @ 100 °C%: 0
Water, ppm: 33
PCB, ppm: 1

Helpful hints on Reports
If you want to order a sample kit for a particular unit, go into that unit profile from the unit workbench and set the Next Sample Date for the date you want the kit delivered. Be sure to select the tests you are interested in and "Save". Select "Emergency" in the test reason field if the sample kits need to be RUSHED, otherwise, leave the test reason as "routine". This will result in a sample kit order for that unit. If you have many units that you want to have sampled at the same time, select those units from the Report Order Workbench and then use the short cut "Change Next Sample Date and Tests.

Other Elements

Notifications – Notifications are e-mail messages to you from the TOGA system that act as reminders of items that need your attention. The following is a list of key notifications and their meaning:
  ➢ Lab Order Shipment / Delivery – messages sent to you when a shipment has been sent to you from the lab including the ship date. In addition, a message is sent once the shipment has been received by you including the received by date and individual.
  ➢ Overdue Units – message notifying you that a particular unit has a sample date that is more than 60 days overdue. This is an indication that there might be something incorrect in the database about this unit, or it may be that you were unable to sample. These units need to be followed up on.
  ➢ Overdue Sample Kits – this message indicates that we have a record of sample kit delivery to your location and that the inventory delivered has not yet been returned. Sample kits are

expensive and should be returned promptly. If you are unable to sample for several months, sample kits should be returned and units rescheduled.

➢ New Reports Available on TOGA – This is a KEY message to let you know when new reports have been approved and are now available for you to review on-line

➢ Outstanding Follow-up – This is a message that will be sent if the TOGA expert puts one of your reports in a status of "Follow-Up Required" and you do not provide follow-up on that report. This message will be sent each month until you provide follow-up in the Client's Comments section of the report.

Search – This feature is critical for viewing historical information from within the TOGA site. The report order workbench, in order to keep it to a reasonable size, only contains information on current report orders that have NOT been reviewed and closed by you. To access your historical report orders utilize this Search function. The Lab Order workbench is similar in that it only displays OPEN Lab Orders (those not yet received by you). You will need to use the Search function to review historical Lab Orders.

Search Criteria:

Criteria that may be used to search for lab orders or report orders :

Company name:
(Type start of company name to search)

Order dates of Lab Orders after:
(mm/dd/yyyy)

Account #:

Order dates of Lab Orders before:
(mm/dd/yyyy)

Location name:
(Type start of location name to search)

Lab Order #:

Report Order #:

Additional criteria that may be used to search for lab orders:

Lab Order Status:

Additional criteria that may be used to search for report orders:

Unit Serial #:

Condition code:

Search Lab Orders

Equipment type:

Report Order Status:

Search Report Orders

You can search for reports orders based on any of the criteria in the top half of this screen along with the criteria in the bottom right. Enter your criteria. The order dates – before and after – can be easily used to finds reports from a certain time period. If you are looking for reports for a particular unit – use the Unit Serial Number field. You can use the condition code field to find reports of units with problems. The results screen has many similar features to the report order workbench and allows for printing or exporting of report data singly or in groups.

This screen can also be used to find lab orders if you are looking for tracking and delivery information on historical orders.

Edit Customer Organization – this is a link in the "Actions" menu that allows you to enter / edit a main phone number for your company as well as a web address, if applicable. Your company name and account number are also listed on this screen. In future releases, Service Plan information for your TOGA account will be available here.

Problems with your Order – In the "Helpful Info" menu there is a choice entitled "Problems with Your Order". If you are having any difficulty with your order – broken glassware upon receipt, not arriving, missing sample data sheets, etc. you can click on this option. An e-mail will be sent to you detailing the information required to address the order problem. Once you receive the e-mail, please reply, with the original e-mail attached. Please complete the requested information in your response and the order issues will be resolved

Purchase Spare Syringes - In the "Helpful Info" menu there is a choice entitled "Purchase Spare Syringes". If you would like to BUY a spare syringe or two to keep on hand, click on this link. An e-mail will be sent to you detailing the information required to purchase syringes. Once you receive the e-mail, please reply, with the original e-mail attached. Please complete the requested information in your response. Syringes will be sent to you shortly.

We hope that you find the new site to be easier to work with. As new features are added we will be sure to communicate the new functionality to you. Again, we welcome any feedback on how we might improve this new site going forward.