



Parker Safety Guide for Selecting and Using Hydraulic Valves and Related Accessories

WARNING: Failure or improper selection or improper use of Parker Hydraulic Valve Division (HVD) Valves or related accessories (“Products”) can cause death, personal injury and property damage. Possible consequences of failure or improper use of these Products include but are not limited to:

- Valves or parts thereof thrown off at high speed
- High velocity fluid discharge
- Explosion or burning of the conveyed fluid
- Contact with suddenly moving or falling objects controlled by the Valve
- Injections by high-pressure fluid discharge
- Contact with fluid that may be hot, cold, toxic or otherwise injurious
- Injuries resulting from injection, inhalation or exposure to fluids
- Injury from handling a heavy item (dropped, awkward lift)
- Electric shock from improper handling of solenoid connections
- Injury from slip or fall on spilled or leaked fluid

Before selecting or using any of these Products, it is important that you read and follow the instructions below. In general, the Products are not approved for in-flight aerospace applications. Consult the factory for the few that are FAA approved.

1.0 GENERAL INSTRUCTIONS

- 1.1 **Scope:** This safety guide provides instructions for selecting and using (including assembling, installing and maintaining) these Products. For convenience all items in this guide are called “Valves”. This safety guide is a supplement to and is to be used in conjunction with the specific Parker catalogs for the specific Valves and/or accessories being considered for use. See item 1.6 below for obtaining those catalogs.
- 1.2 **Fail-Safe:** Valves can and do fail without warning for many reasons. Design all systems and equipment in a fail-safe mode, so that failure of the Valve or Valve Assembly will not endanger persons or property.
- 1.3 **Safety Devices:** Never disconnect, override, circumvent or otherwise disable any safety lockout on any system whether powered by HVD Valves or any motion control system of any manufacturer. (e.g. Automatic shut-off on a riding lawn mower should the operator get out of the seat).
- 1.4 **Distribution:** Provide a copy of this safety guide to each person that is responsible for selecting or using HVD Valve Products. Do not select HVD Valves without thoroughly reading and understanding this safety guide as well as the specific Parker catalogs for the Products considered or selected.
- 1.5 **User Responsibility:** Due the wide variety of operating conditions and applications for Valves, HVD and its distributors do not represent or warrant that any particular Valve is suitable for any specific system. This safety guide does not analyze all technical parameters that must be considered in selecting a product. The user, through its own analysis and testing is solely responsible for:
 - Making the final selection of the Valve
 - Assuring that the user’s requirements are met and that the application presents no health or safety hazards.
 - Providing all appropriate health and safety warnings on the equipment on which the Valves are used.
 - Assuring compliance with all applicable government and industry standards.

2.0 VALVE SELECTION INSTRUCTIONS

- 2.1 **Pressure:** Valve selection must be made so that the maximum working pressure of the Valve is equal to or greater than the maximum system pressure. Surge, impulse or peak transient pressures in the system must be below the maximum working pressure of the Valve. Surge, impulse and peak pressures can usually be determined by sensitive electrical instrumentation that measures and indicates pressures at millisecond intervals. Mechanical pressure gauges indicate only average pressure and cannot be used to determine surge, impulse or peak transient pressures. Burst pressure ratings if given or known are for manufacturing purposes only and are not an indication that the Product can be used in applications at the burst pressure or otherwise above the maximum working pressure.
- 2.2 **Temperature:** The fluid temperature must be regulated or controlled so that the operating viscosity of the fluid is maintained at a level specified for the particular Valve product. Such ranges are given in the product catalogs or can be obtained from the appropriate customer service department for the particular Valve product.
- 2.3 **Fluid Compatibility:** The fluid conveyed in Valves has direct implications on the Valve selection. The fluid must be chemically compatible with the Valve component materials. Elastomer seals, brass, cast iron, aluminum for example all are potentially affected by certain fluids. Additionally, fluid selection affects the performance of various Valves. Considerations relative to fluid selection are outlined in the specific HVD Valve product catalog. Of particular importance is that the fluid be for hydraulic use, contain the proper additives and wear inhibitors. See 1.6 “Additional Questions” above for information to obtain such HVD catalogs.
- 2.4 **Changing Fluids:** If a system requires a different fluid, it should be done with the guidance in number 2.3 above. Additionally, it may be necessary to flush the system (including the Valves) to remove any of the previous fluid. Consult the Parker Valve Division for guidance.
- 2.5 **Size:** Transmission of power by means of pressurized fluid varies with pressure and rate of flow. The size of the components must be adequate to keep pressure losses to a minimum and avoid damage due to heat generation or excessive fluid velocity.
- 2.6 **Placement:** Installation of Valves must take into account the orientation of the Valve and the proximity of the Valve to other parts of the system. This includes but is not limited to closeness to hot and cold areas, access for servicing and operation as well as orientation for proper connectors.
- 2.7 **Ports:** Connection of Valves in systems can be by threaded ports, sub-base surfaces, flanges and manifolds. In all cases, the proper fitting, surface or mounting hardware must be selected to properly seal and contain the system fluid so as to avoid the adverse conditions listed in the initial warning box above. Specifically, if using threaded ports, the designer must make sure that the mating fitting is of the compatible thread. Also, the instructions provided by the connector hardware supplier must be read and understood so as to properly assemble the connector. The Parker Safety Guide for using Hose, Tubing and Fittings and Related Accessories is but one reference to this end.
- 2.8 **Environment:** Care must be taken to insure that the Valve and Valve Assemblies are either compatible with or protected from the environment (that is, surrounding conditions) to which they are exposed. Environmental conditions including but not limited to ultraviolet radiation, sunlight, heat, ozone, moisture, water, salt water, chemicals and air pollutants can cause degradation and premature failure.
- 2.9 **Electric Power:** For Valves requiring electric power for control, it is imperative that the electricity be delivered at the proper voltage, current and wattage requirements. To obtain the proper control requirements please refer to the respective Parker product catalog for the specific Valve that is intended for use. If further guidance is required, call the appropriate technical service department identified in the respective Parker product catalog.
- 2.10 **Specifications and Standards:** When selecting Valves, government, industry and Parker specifications and recommendations must be reviewed and followed as applicable.
- 2.11 **Accessories:** All accessories used in conjunction with any Parker Valve product must be rated to the same requirements of the Valve including but not limited to pressure, flow, material compatibility, power requirements. All of these items must be examined as stated in the “VALVE INSTALLATION INSTRUCTIONS” paragraph 3.0.

3.0 VALVE INSTALLATION INSTRUCTIONS

- 3.1 **Component Inspection:** Prior to use, a careful examination of the Valve(s) must be performed. The Valve intended for use must be checked for correct style, size, catalog number and external condition. The Valve must be examined for cleanliness, absence of external defects or gouges, cracked or otherwise deformed parts or missing items. The mounting surface or port connections must be protected and free of burrs, scratches, corrosion or other imperfections. Do NOT use any item that displays any signs of nonconformance. In addition, any accessory including but not limited to fittings, bolt kits, hoses, sub bases, manifolds, and electrical connectors must be subjected to the same examination.
- 3.2 **Handling Valves:** Many Valves whether HVD Valves or of another manufacturer can be large, bulky or otherwise difficult to handle. Care must be taken to use proper lifting techniques, tools, braces, lifting belts or other aids so as not to cause injury to the user, any other person or to property.
- 3.3 **Filtration:** Fluid cleanliness is a necessity in any hydraulic system. Fluid filters must be installed and maintained in the system to provide the required level of fluid cleanliness. Filters can be placed in the inlets, pressure lines and return lines. The level of cleanliness required is specified in the HVD product catalog for the specific Valve(s) selected or intended for use.
- 3.4 **Servo Valves:** Application of Servo Valves in general requires knowledge and awareness of “closed loop control theory” and the use of electronic controls for successful and safe operation. Individuals who do not have such experience or knowledge must gain training before use of such Products. Parker offers both classroom training as well as manuals to assist in gaining this knowledge.
- 3.5 **Accessory Ratings:** All accessories used in combination with the selected or intended Valve product must be rated and compatible with the selected Valve. Specifically, the items must be of equal or greater rating including but not limited to pressure, flow, power, size, port style, thread connectors and material.
- 3.6 **Connection Styles:** It is the responsibility of the user of the Parker product to properly select connectors and accessories that match the connections on the sub plate, Valve, flange or threaded connection or manifold. It is also the responsibility of the installer to possess adequate skill and knowledge including but not limited to thread preparation, torque technique, hose assembly and inspection, tube preparation and assembly, and fitting installation.
- 3.7 **Electrical Connections:** All electrical connections must be made to the applicable codes and local safety requirements.
- 3.8 **Gauges and Sensors:** The user must install sufficient gauges and sensors in the system so as to be able to determine the condition of the system. This includes but is not limited to pressure gauges, flow meters, temperature sensors and site gauges. These are of utmost importance should removal or disassembly of a Valve, portion of a Valve or portion of the system become necessary. Refer to “VALVE MAINTENANCE AND REPLACEMENT INSTRUCTIONS” for details and especially item 4.8.
- 3.9 **System Checkout:** Once installed, the Valve installation must be tested to insure proper operation and that no external leakage exists. All safety equipment must be in place including but not limited to safety glasses, helmets, ear protection, splash guards, gloves, coveralls and any shields on the equipment. All air entrapment must be eliminated and the system pressurized to the maximum system pressure (at or below the Valve maximum working pressure) and checked for proper function and freedom from leaks. Personnel must stay out of potentially hazardous areas while testing and using.
- ### **4.0 VALVE MAINTENANCE AND REPLACEMENT INSTRUCTIONS**
- 4.1 **Maintenance Program:** Even with proper installation, Valves and Valve System life may be significantly reduced without a continuing maintenance program. The severity of the application and risk potential must determine the frequency of the inspection and the replacement of the Products so that Products are replaced before any failure occurs. A maintenance program must be established and followed by the user and, at a minimum, must include instructions 4.2 through 4.10. An FMEA (Failure Mode and Effects Analysis) is recommended in determining maintenance requirements.
- 4.2 **Visual Inspection-Valves:** Any of the following conditions require immediate shut down and replacement of the Valve.
- Evidence that the Valve is in partial dis-assembly.
 - Visible crack or suspicion of a crack in the Valve housing or bent, cracked or otherwise damaged solenoid.
 - Missing or partially extending drive pin on a flow control knob.
 - Missing, loose components, obstructions or other condition impeding the motion or function of the manual knob, lever, foot pedal or other mechanical operator of a hydraulic Valve.
 - Any evidence of burning or heat induced discoloration.
 - Blistered, soft, degraded or loose cover of any kind.
 - Loose wire or electrical connector.
- 4.3 **Visual Inspection-Other:** The following conditions must be tightened, repaired, corrected or replaced as required.
1. Fluid on the ground must be cleaned immediately. Also, the source of the fluid must be determined prior to running the equipment again.
 2. Leaking port or excessive external dirt build-up.
 3. System fluid level is too low or air is entrapped or visible in the reservoir.
 4. Equipment controlled by the Valve or Valve assembly has been losing power, speed, efficiency
- 4.4 **Filter Maintenance:** System filters must be maintained and kept in proper working order. The main service requirement is periodic replacement of the filter element or screen.
- 4.5 **Functional Test:** See “System Checkout” number 3.9 above in “VALVE INSTALLATION INSTRUCTIONS”.
- 4.6 **Replacement Intervals:** Valves and Valve Systems will eventually age and require replacement. Seals especially should be inspected and replaced at specific replacement intervals based on previous experience, government or industry recommendations, or when failures could result in unacceptable downtime, damage or injury risk. At a minimum seals must be replaced whenever service is rendered to a Valve product.
- 4.7 **Adjustments, Control Knobs, and Other Manual Controls:** System Pressure and Flow are typically adjusted by knobs and/or handles. A set-screw or lock-nut secures the adjustment device so as to maintain the desired setting. This set-screw or lock-nut must first be loosened prior to making any adjustments and re-tightened after adjustment on the HVD Valve. All adjustments must be made in conjunction with pressure gauges and/or flow meters (or by watching the speed of the actuator in the case of setting flow only). See paragraph “Gauges and Sensors” above in the section “VALVE INSTALLATION INSTRUCTIONS”. Under no circumstances should any control knob, adjustment stem, handle, foot pedal or other actuating device be forced beyond the mechanical stop(s) on the Valve. For example, the Parker Safety Notice Bulletin **HY14-3310-B1/US** for HVD Colorflow Valves specifically restricts the adjustment torque to “hand adjust” or “less than 10 ft/lbs” if it cannot be adjusted by hand. Failure to adhere to this may force the knob beyond the stop point allowing it to be ejected at high speed resulting in death, personal injury and property damage.
- 4.8 **High pressure Warning:** Hydraulic power is transmitted by high-pressure fluids through hoses, fittings and valves, pumps and actuators. This condition can be dangerous and potentially lethal and, therefore, extreme caution must be exercised when working with fluids under pressure. From time to time, hoses, Valves, tubes or fittings fail if they are not replaced at proper time intervals. Typically these failures are the result of some form of misapplication, abuse, wear, or failure to perform proper maintenance. When such failure occurs, generally the high pressure fluid inside escapes in a stream which may or may not be visible to the user. Under no circumstances should the user attempt to locate the leak by “feeling” with their hands or any other part of their body. High-pressure fluids can and will penetrate the skin and cause severe tissue damage and possible loss of limb or life. Even seemingly minor hydraulic fluid injection injuries must be treated immediately by a physician with knowledge of the tissue damaging properties of hydraulic fluid. If a hose, tube, fitting or Valve failure occurs, immediately shut down the equipment and leave the area until pressure has been completely released from the system. Simply shutting down the pump may or may not eliminate the pressure in the system. It may take several minutes or even hours for the pressure to be relieved so that the leak area can be examined safely. Once the pressure has been reduced to zero, the suspected leaking item can be taken off the equipment and examined. It must always be replaced if a failure has occurred. Never attempt to patch or repair a connector (especially a hose) or Valve that has failed. Consult the nearest Parker distributor or the appropriate Parker division for component replacement information. Never touch or examine a failed hydraulic component unless it is obvious that the item no longer contains fluid under pressure.

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