
**Petroleum and natural gas industries —
Drilling and production equipment —**

Part 3:

**Running tools, pulling tools and kick-over
tools and latches for side-pocket
mandrels**

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*Industries du pétrole et du gaz naturel — Équipement de forage et de
production —*

*Partie 3: Outils de mise en place, de dépose, de déviation et de
verrouillage pour raccords à poche latérale*
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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights.

ISO 17078-3 was prepared by Technical Committee ISO/TC 67, *Materials, equipment and offshore structures for petroleum, petrochemical and natural gas industries*, Subcommittee SC 4, *Drilling and production equipment*.

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ISO 17078 consists of the following parts, under the general title *Petroleum and natural gas industries — Drilling and production equipment*:

- *Part 1: Side-pocket mandrels* [ISO 17078-3:2009](https://standards.iteh.ai/catalog/standards/sist/e1c5a1ba-c860-4a46-94f0-ae05d993522/iso-17078-3-2009)
- *Part 2: Flow-control devices for side-pocket mandrels*
- *Part 3: Running tools, pulling tools and kick-over tools and latches for side-pocket mandrels*
- *Part 4: Practices for side-pocket mandrels and related equipment*

Introduction

This part of ISO 17078 has been developed by users/purchasers and suppliers/manufacturers of running tools, pulling tools, kick-over tools, and latches used for the installation and retrieval of flow control and other devices in side-pocket mandrels intended for use in the worldwide petroleum and natural gas industry. This part of ISO 17078 is intended to provide requirements and information to all parties who are involved in the specification, selection, manufacture, testing and use of these latches and related tools. Further, this part of ISO 17078 addresses supplier/major manufacturer requirements that set the minimum parameters with which suppliers/manufacturers must comply to claim conformity with this part of ISO 17078.

This part of ISO 17078 has been structured to support varying requirements in environmental service classes, design validation, product functional testing and quality control grades. These variations allow the user/purchaser to select the necessary grade for a specific application.

Well environmental service classes. One environmental service class is provided for running tools, pulling tools and kick-over tools, and four environmental service classes are provided for latches. These variations provide the user/purchaser with a range of choices from which to select products to meet varying environmental conditions.

Design validation grades. There are two design validation grades for running tools, pulling tools, kick-over tools and latches that provide the user/purchaser with a range of technical and performance requirements. This ensures that the products supplied according to this part of ISO 17078 will meet the requirements and that the user/purchaser is able to compare these requirements with his or her preference or application and determine whether additional requirements are placed on the supplier/major manufacturer.

It is important that users of this part of ISO 17078 be aware that requirements in addition to those outlined herein can be needed for individual applications. This part of ISO 17078 is not intended to inhibit a supplier/major manufacturer from offering, or the user/purchaser from accepting, alternative equipment or engineering solutions. This can be particularly applicable where there is innovative or developing technology. Where an alternative is offered, it is the responsibility of the supplier/major manufacturer to identify any variations from this part of ISO 17078 and provide details.

Product functional testing grades. There are two product functional testing grades for running tools, pulling tools, kick-over tools and latches that provide the user/purchaser with a range of choices for confirming that products manufactured under this part of ISO 17078 meet the design specifications.

Quality control grades. There are two quality grades for running tools, pulling tools, kick-over tools and latches that provide the user/purchaser with the choice of requirements to meet specific preferences or applications. Additional quality upgrades can be specified by the user/purchaser as supplemental requirements.

In addition to this document, ISO 17078-1 provides requirements for side-pocket mandrels used in the petroleum and natural gas industries. ISO 17078-2 provides requirements for flow-control devices for side-pocket mandrels. ISO 17078-4 provides supplemental aids and guidelines for using these tools.

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Petroleum and natural gas industries — Drilling and production equipment —

Part 3: Running tools, pulling tools and kick-over tools and latches for side-pocket mandrels

1 Scope

This part of ISO 17078 provides requirements and guidelines for running tools, pulling tools, kick-over tools and latches used for the installation and retrieval of flow control and other devices to be installed in side-pocket mandrels for use in the petroleum and natural gas industries. This includes requirements for specifying, selecting, designing, manufacturing, quality control, testing and preparation for shipping of these tools and latches. Additionally, it includes information regarding performance testing and calibration procedures.

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The processes of installation, retrieval, maintenance and reconditioning of used running, pulling and kick-over tools and latches are outside the scope of this part of ISO 17078. Centre-set and tubing-retrievable mandrel applications are not covered.

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2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

ISO 2859-1, *Sampling procedures for inspection by attributes — Part 1: Sampling schemes indexed by acceptance quality level (AQL) for lot-by-lot inspection*

ISO 3601-1, *Fluid power systems — O-rings — Part 1: Inside diameters, cross-sections, tolerances and designation codes*

ISO 3601-3, *Fluid power systems — O-rings — Part 3: Quality acceptance criteria*

ISO 6506-1, *Metallic materials — Brinell hardness test — Part 1: Test method*

ISO 6507-1, *Metallic materials — Vickers hardness test — Part 1: Test method*

ISO 6508-1, *Metallic materials — Rockwell hardness test — Part 1: Test method (scales A, B, C, D, E, F, G, H, K, N, T)*

ISO 6892, *Metallic materials — Tensile testing at ambient temperature*

ISO 9000, *Quality management systems — Fundamentals and vocabulary*

ISO 15156 (all parts), *Petroleum and natural gas industries — Materials for use in H₂S-containing environments in oil and gas production*

ISO 17078-3:2009(E)

ISO 17078-1:2004, *Petroleum and natural gas industries — Drilling and production equipment — Side-pocket mandrels*

ISO 17078-2:2007, *Petroleum and natural gas industries — Drilling and production equipment — Flow-control devices for side-pocket mandrels*

ISO/IEC 17025, *General requirements for the competence of testing and calibration laboratories*

ASME BPVC-VIII:2007, *BPVC Section VIII-Rules for Construction of Pressure Vessels Division 1* ¹⁾

ASME BPVC-IX:2007, *BPVC Section IX-Welding and Brazing Qualifications*

ASTM A370, *Standard Test Methods and Definitions for Mechanical Testing of Steel Products*

ASTM D1415, *Standard Test Method for Rubber Property — International Hardness* ²⁾

ASTM D2240, *Standard Test Method for Rubber Property — Durometer Hardness*

ASTM E18, *Standard Test Methods for Rockwell Hardness of Metallic Materials*

SAE AMSH6875:1998, *Heat Treatment of Steel Raw Materials* ³⁾

3 Terms and definitions

For the purposes of this document, the terms and definitions given in ISO 9000 (for quality-system-related terms not given below) and the following apply.

3.1 acceptance
agreement/acknowledgement that latches and related tool component(s) and/or assembly(ies) can be used without restriction

NOTE Adapted from ISO 17078-1:2004, definition 3.1.

3.2 bluing
application of blue indicating fluid used to determine interference between parts

3.3 certificate of conformance
documentation declaring that a specific running, pulling or kick-over tool or latch meets the requirements of this part of ISO 17078 and the requirements of the functional specification

**3.4 center-set mandrel US
centre-set mandrel GB
mandrel**
device used to contain a flow-control device in the centre of a tubing string

1) American Society of Mechanical Engineers, Three Park Avenue, New York, NY 10016-5990, USA.

2) American Society for Testing and Materials, 100 Barr Harbor Drive, West Conshohocken, PA 19428-2959, USA.

3) SAE International, 400 Commonwealth Drive, Warrendale, PA 15096-0001, USA.

3.5**coating**

application of a thin film of one material on the surface of another material for various purposes

[ISO 17078-2]

3.6**conveyance**

delivery or retrieval system for a flow-control device and associated equipment

3.7**critical length**

linear distance in a side-pocket mandrel between the top of the orienting sleeve slot and the face of the pocket, measured perpendicular to the face of the pocket

3.8**date of manufacture**

date of manufacturer's final acceptance of finished products

NOTE The date is day-month-year in the format DD-MM-YYYY.

[ISO 17078-1]

3.9**design family**

group of products whose configurations, sizes, materials and applications are sufficiently similar that identical design methodologies can be used to establish the design parameters for each product within the family

[ISO 17078-1]

3.10**design method**

method, procedure or equations used by the supplier/manufacturer to design a running, pulling or kick-over tool or a latch product

3.11**design validation**

process of proving a design by testing to demonstrate conformity of the product to design requirements

3.12**design verification**

process of examining the result of a given design or development activity to determine conformity with specified requirements

3.13**deviation**

wellbore inclination in degrees from true vertical

3.14**end connections**

threads integral to the running, pulling and kick-over tools, male or female, used to connect these tools to the tool string and to connect latches to the flow-control device

3.15**environmental service grade****environmental service class**

category of environmental conditions for which the latches and related tools are designed to be used

3.16
flow-control device

device installed in a side-pocket mandrel to control flow of fluids between a well's casing annulus and tubing

3.17
full life cycle

expected period of time that the product functions according to supplier's/manufacturer's specifications

NOTE Adapted from ISO 17078-1:2004, definition 3.17.

3.18
functionality

definition or description of the performance with associated properties, characteristics and limits of a running, pulling or kick-over tool or a latch

NOTE Adapted from ISO 17078-2:2007, definition 3.21. This definition also differs from that given in ISO 17078-1.

3.19
heat

<cast lot> material originating from a final melt

NOTE For re-melted alloys, a heat is defined as the raw material originating from a single re-melted ingot.

[ISO 17078-2]

3.20
interface compatibility

capability of a component to fit with other (associated components and) to perform a defined function in conjunction with them

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[05d993522/iso-17078-3-2009](https://standards.iteh.ai/catalog/standards/sist/e1c5a1ba-c860-4a46-94f0-05d993522/iso-17078-3-2009)

3.21
job lot

group or quantity of piece parts, subassemblies or assemblies that are grouped or processed together during the manufacturing process

[ISO 17078-1]

3.22
kick-over tool

device used to orient or align a pulling or running tool for installation or retrieval of a flow-control device into or out of a side-pocket mandrel

NOTE See Figures E.3 and E.4.

3.23
latch

retention mechanism for a flow-control device that is landed in the side-pocket mandrel

NOTE See Figure E.5.

3.24
model

running, pulling or kick-over tool or latch that has unique components and functional characteristics that differentiate it from other products of the same type

3.25**operating environment**

set of environmental conditions to which the product is exposed during its service life

NOTE Environmental conditions can include temperature, pressure, liquid composition and properties, gas composition and properties, solids, etc.

[ISO 17078-1]

3.26**operational parameter**

requirement and/or restriction that the product is exposed to during its service life

EXAMPLE Operating environment, method(s) or condition(s) of installation and retrieval of latches and related tools, exposure to well treatment chemicals/fluids, etc.

[ISO 17078-1]

3.27**product functional testing**

process, method(s) and/or test(s) used by the supplier/manufacturer to demonstrate that a particular running, pulling or kick-over tool and/or latch has been manufactured to fully meet the functional and manufacturing requirements for that product

3.28**pulling tool**

device used to connect to and retrieve a flow-control or other device from a side-pocket mandrel

NOTE See Figure E.2.

3.29**quality control**

process and/or method(s) used by the supplier/manufacturer to ensure the quality of the materials and manufacturing process(es)

[ISO 17078-2]

3.30**rated pressure**

maximum differential pressure, at the rated temperature, to which the latches and related tools are designed to be subjected in normal operation

3.31**rated temperature**

maximum temperature, at a specified pressure, to which the latches and related tools are designed to be subjected in normal operation

3.32**running tool**

device used to connect to and install a flow control or other device into a side-pocket mandrel

NOTE See Figure E.1.

3.33**side-pocket mandrel**

tubing-mounted device that accepts a flow-control or other device in a bore that is offset from and essentially parallel with the through-bore of the tubing product

NOTE This parallel bore includes sealing surfaces and latching profiles.

3.34
significant design change

change to the design identified by the supplier/manufacturer that may affect the performance of the product in the intended service condition

3.35
supplier/manufacturer

company, organization or entity that designs, manufactures and/or markets latches and related tools

3.36
technical specification

parameters stating the operating limit(s) relating to the design, assembly and testing of the component parts or assemblies

NOTE Adapted from ISO 17078-1:2004, definition 3.43. This definition also differs from that given in ISO 17078-2.

3.37
test pressure

maximum pressure at test temperature, as specified by the pertinent test procedure

NOTE This definition differs from those given in ISO 17078-1 and ISO 17078-2.

3.38
test temperature

temperature, as specified by the pertinent test procedure, at which the test is conducted

[ISO 17078-2]

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3.39
tool string

assembly of components required to install or retrieve a flow-control device

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3.40
traceability

(job lot) ability for individual components to be designated as originating from a job lot that identifies the included heat(s)

NOTE Adapted from ISO 17078-2:2007, definition 3.49. This definition also differs from that given in ISO 17078-1.

3.41
tubing mass

mass per length of tubular product

NOTE Under the International System of Units, the SI, "mass" is the appropriate term for a quantity denominated in kilograms or pounds-mass, and "weight" is the appropriate term for a force denominated in newtons or pounds-force.

3.42
tubing-retrievable mandrel

device used to contain a flow-control device where the tubing must be pulled to install or retrieve the flow-control device

3.43
type

latch or related tools or other components that are distinguished by a particular method of operation

3.44
user/purchaser

company, organization or entity that purchases, installs and uses latches and related tools

3.45**validated design family**

design family whereby the validation of one or more representative design(s) and product(s) permits the entire design family to be treated as validated by association, see 6.4

3.46**welding**

method for joining two metallic substances through a process of melting and re-solidification

NOTE The term “welding” covers welding, brazing or soldering operations.

3.47**wireline**

equipment and associated technique(s) used to install and retrieve latches and related tools in a well using a continuous length of solid line (slick line) or stranded wire, appropriate spooling equipment at the surface and mass and specialized tools attached to the well (downhole) end of the wire

3.48**yield strength**

stress level measured at a specific test temperature beyond which the material plastically deforms and will not return to its original dimensions

NOTE The yield strength is expressed in units of force per unit area.

4 Symbols and abbreviated terms

ANSI American National Standards Institute

ASME American Society of Mechanical Engineers

ASTM American Society for Testing and Materials

AWS American Welding Society

HAZ heat affected zone

NDE non-destructive testing method

PQR procedure qualification record

WPQ welder performance qualification

WPS weld procedure specification

5 Functional specification**5.1 General**

The purpose of the functional specification is to provide the user/purchaser guidance in specifying and defining the functional requirements for running tools, pulling tools, kick-over tools and latches.

The user/purchaser shall prepare a functional specification to order products that conform to this part of ISO 17078 and specify the following requirements and operating conditions as appropriate, and/or identify the supplier's/manufacturer's specific product. These requirements and operating conditions may be conveyed by means of a dimensional drawing, data sheet or other suitable documentation.