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PREFACE

This distance learning module is based on the notes for the tutored course module that has been offered for several years by the Institute of Materials Finishing.

Changes and additions have been made to the original notes to take into account the various technical innovations that have taken place in more recent years and, in particular, the changes in environmental, health & safety practices and general changes in industrial working.

One major change has been to ensure that study by distance learning mirrors the course offered by the tutored route. The Objective Syllabus for both paths is now identical and the courses are examined in the same way, both leading to the same qualification and certification.

The Institute appreciates the hard work in carrying out this revision by Clive Barnes and Trevor Crichton. Further, thanks are expressed to all those other members of the Institute who have contributed by way of offering advice, reading of revised lessons etc.

INTRODUCTION TO DISTANCE LEARNING AND THIS MODULE

Distance Learning differs from the traditional method of learning that you will have used at school or college, where you work at a fixed rate that is determined by your teacher or lecturer. Their rate of teaching may be too fast or too slow for different students, so you either get bored or cannot keep up. Furthermore, if you miss a lesson, you will have to catch up before the next lesson, or you will quickly fall behind.

Distance Learning is not a new concept and has been around for several decades and it allows you to work at your own pace and in your own time. The Institute of Materials Finishing has been offering their courses for many years and after listening to our students, we realised that the preferred method of teaching was by offering scripted lecture notes.

Although you will be often working alone in your studies, the Institute makes sure that you have enough support if and when you have any problems.

In this latest revision of our courses, each lesson is a self contained and complete unit. This 2010 revision has also reviewed the course content to make it more applicable to the modern surface finishing and surface engineering industry and has allowed us to include new and recently introduced technologies.

As you are aware, you have been allocated an 'Industrial Counsellor' who, hopefully, is a member of your company. One of the roles of the Industrial Counsellor is to help you understand what you are being taught. We fully accept that non-one will fully understand every part of their course the first time they see it. Every person is different and has different skills and attributes, so they will find different parts of the course either easy or more difficult. When you meet a difficulty, you should ask the Industrial Counsellor to help you; it is their role to help you to understand the content of the lessons. If a suitable person is not immediately available within your company then the Institute will have made arrangements for you to be linked to a suitable local member of the Institute who has agreed to be available to assist you. Even if this person cannot immediately answer your problem, he or she will know someone who can. Most importantly, do not become disheartened in your studies. If, on any occasion, your Counsellor is unable to help, you should contact the Education Manager at The IMF's Head Office who will arrange for a Professional Member to contact and assist you.

You will find it very useful to have a pencil or pen and paper with you when you are studying, as you can quickly write down any extra notes or explanations; these can be very useful when you come to revising or are seeking further help.

This module is made up from a set of lessons of various lengths that are composed of written text with some illustrations where relevant. You may need to read the text several times to fully understand it and before moving on to the next lesson.

There is a series of different tasks set throughout the text; these are headed SAQs, SMAs and MAs.

SAOs - Self Answered Questions

SAQ's are questions relating to what you have just studied. Their purpose is to check that you have understood the lesson so far. Firstly, you should try to answer the question without checking back through your notes and then check your answer with the model answer provided at the end of the Lesson. If your answer is correct, you should continue with the next part of the lesson. If, however, you are unable to answer the question or have incorrectly answered the question, we suggest you go over the section again and get a better understanding of the lesson.

SMA – Self Marked Assessment

SMA's are usually found at the end of a lesson, but by no means every lesson. They are a series of questions that you should try to answer. The questions will be relevant to the lessons that you have just studied and there will be four or five possible answers for each question. You should identify which one you think is correct and when you have completed the series of questions, you should check your answers against those given at the end of the lesson. You will also find a short explanation explaining why each answer is correct or incorrect.

These SMAs, as both questions and answers, are also included in Appendix 1 and can be a useful source of revision prior to your examination.

MA –Marked Assignment

You will be expected to carry out a series of 4 assignments during your studies. These will cover some of the Module's objectives and are designed to test your understanding of the study material and that you can use the knowledge gained to suggest answers to specific problems or situations. In the traditional system of learning, this may have been called 'homework'.

You will find detailed instructions on how to carry out the assignments in Appendix 2. Please pay particular attention to the information regarding **plagiarism** and make sure you fully understand it and the consequences of plagiarism

After completing each assignment, it should be sent to the Institute to be externally marked. (NOTE Students on tutored courses will have their assignments marked by their tutor.) Once marked, it will be returned to you. The total marks you receive for the four assignments contribute up to a maximum of 20% towards your final examination mark, so you are rewarded for your efforts.

Please note: marked assignments are compulsory and must be submitted by the due date for you to be eligible for the final examination. This is fully explained in Appendix 2 and Appendix 5.

The Examination

Your examination will last for 2 hours and the examination paper consists of two sections:

Section A 5 short essay questions, all of which should be attempted, for which it is

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suggested you should allow about 30 minutes in total for your 5 answers.

Section B consists of 8 longer essay questions, of which you should attempt five; it is suggested that you allow about 15 minutes for each answer.

Section A gives a maximum of 25% of your total marks and Section B gives 75% of your total marks for the examination. Your answer papers will be marked by an external examiner of the Institute and the examiner's mark will be moderated by the Institute's Examination and Qualifications Board (EQB).

The pass mark is 40%. This is made up from both your marks for your MA's as well as the marks you obtain in the final examination.

A mark of 60% and over gives a '**Pass with Merit**' whilst a mark of over 75% gives a '**Pass with Distinction**'. If you achieve these marks, the credit will be shown on your certificate. (An average mark of at least 40% must be obtained for the 4 assignments for a merit or distinction to be awarded)

NOTE: Candidates whose first language is not english may use a dictionary book during the examination, other types of dictionary, e.g. electronic ones and technical dictionaries, are not permitted. The examination's invigilator will check that the dictionary is suitable before the start of the examination. (Examples of suitable dictionaries are standard english dictionaries and dictionaries providing translation from english to another language and vice versa.)

Additional Distance Learning Modules

There are additional modules of a similar academic standard. These are:

- Principles of Electroplating
- Electroplating Practice
- Powder Coating
- Environmental, Health and Safety
- Materials Science
- Electroforming

Any one of the above, combined with the module you have just completed, can lead to the award of a '**Technician Certificate**'. The benefit here is that you can apply for the professional qualification '**Technician of the Institute of Materials Finishing**' and the **insignia TechIMF**, with which you can apply for the international award from the UK Engineering Council of '**Engineering Technician**' and the insignia **EngTech**, which is internationally recognised across all industries.

OBJECTIVE SYLLABUS FOR PAINT, LACQUER AND VARNISH MODULE

SECTION A - WHY SURFACE FINISHING?

Lesson 1 - Surface Finishing Techniques and Applications

At the end of Lesson 1, you should be able to:

- 1.1 Define surface finishing.
- 1.2 Describe the main processes used for Surface Finishing and their basic principles.
- 1.3 Describe the purposes for which these finishes are applied to substrates.
- 1.4 Describe the nature of the Surface Finishing Industry and its economic importance.

Lesson 2 - Properties of Different Surface Finishes

At the end of Lesson 2, you should be able to:

- 2.1 List the strengths and weaknesses of various surface finishes.
- 2.2 Decide which finish is appropriate for a particular function.

SECTION B- BASIC SCIENCE FOR COATINGS

Lesson 3 - Chemical Symbols and Chemical Equations

At the end of Lesson 3, you should be able to:

- 3.1 Write the chemical symbols for the chemicals used most often in surface finishing.
- 3.2 Write chemical equations for simple chemical reactions.
- 3.3 Understand how atoms join together by ionic and covalent bonds.

Lesson 4 - How Coatings Can Prevent Corrosion

At the end of lesson 4 you should be able to:

- 4.1 Define corrosion and understand its consequences.
- 4.2 Understand the chemistry of corrosion of iron.
- 4.3 Understand the electrochemical nature of the aqueous corrosion of metals.
- 4.4 Know how the electrochemical series can be used to select coatings for the prevention of corrosion.
- 4.5 Understand how coatings prevent corrosion.
- 4.6 Describe the need for accelerated corrosion tests for coated products and explain the main tests.

Lesson 5 - Calculating thicknesses, areas and volumes

At the end of Lesson 5, you should be able to:

- 5.1 Calculate area and volumes.
- 5.2 Calculate the coverage of paint and coating powders.
- 5.3 Calculate the cost of the paint or coating powder per component.

Lesson 6 - Adhesion

At the end of Lesson 6, you should be able to:

- 6.1 Discuss some basic theories of adhesion that apply to powder coatings.
- 6.2 Discuss some of the problems which occur at a substrate/coating interface.
- 6.3 Assess the effectiveness of different cleaning treatments.

SECTION C - INTRODUCTION TO PAINTS, LACQUERS AND VARNISHES

Lesson 7 - The Composition of Paints Lacquers and Varnishes

At the end of Lesson 7 you should be able to:

- 7.1 Define paint, lacquer or varnish.
- 7.2 List the basic constituents of liquid coatings.
- 7.3 Name the most common polymer resins used in liquid coating formulations.
- 7.4 Explain how the structure of different polymers imparts different properties to the coating.
- 7.5 Understand the role of pigments.
- 7.6 Understand the contribution of solvents and diluents in making coating materials suitable for application.

SECTION D - PREPARATION FOR PAINTING

Lesson 8 - Substrates and Their Cleaning

At the end of Lesson 8 you should be able to:

- 8.1 Understand why cleaning of the substrate is important.
- 8.2 Discuss the advantages and disadvantages of using solvents for cleaning.
- 8.3 Discuss methods of using water based systems for cleaning surfaces.
- 8.4 Discuss mechanical methods of cleaning.

Lesson 9 - Pretreatment with Chemical Conversion Coatings

At the end of Lesson 9, you should be able to:

- 9.1 Define the purposes of conversion coatings.
- 9.2 Discuss the chemistry of phosphating on steel.
- 9.3 Discuss the different types of phosphate coatings, explain their uses and be able to select the right one for products under different environmental conditions of use.
- 9.4 Describe the layout of a typical phosphating plant.
- 9.5 Discuss the use of chromate conversion coatings on different metals.
- 9.6 Know that safer alternatives to phosphating and chromating solutions are now available

Lesson 10 - Working with Paints, Lacquers and Varnishes

At the end of Lesson 10 you should be able to:

- 10.1 Explain the practical precautions to be taken when working with coating materials
- 10.2 Understand the initial preparation of the coating material prior to application.
- 10.3 Discuss the initial testing necessary to ensure that the coating material is suitable for application.
- 10.4 Carry out standard tests to establish application criteria and parameters.

SECTION E - APPLICATION OF PAINTS, LACQUERS AND VARNISHES

Lesson 11 - Atomising Techniques for Applying Paints, Lacquers and Varnishes

At the end of Lesson 11 you should be able to:

- 11.1 Know the criteria for selecting the coating technique.
- 11.2 Understand the importance of transfer efficiency.
- 11.3 List the different techniques for applying paints, lacquers and varnishes.
- 11.4 Describe conventional spray application and know its limitations.
- 11.5 Understand the benefits of HVLP and airless spraying techniques.
- 11.6 Know the benefits of 'hot spray' techniques
- 11.7 Describe a typical electrostatic spraying process.
- 11.8 Know the benefits of electrostatic spraying.

Lesson 12 - Application of Paints, Lacquers and Varnishes by Non-Atomisation Techniques

At the end of Lesson 12 you should be able to:

- 12.1 List the different non-atomisation application techniques.
- 12.2 Describe techniques for coating small components such as fasteners.
- 12.3 Know the advantages and disadvantages of the various dipping techniques.
- 12.4 Describe automated processes for coating high volumes of simple shapes.

Lesson 13 - Deposition of electrophoretic and autophoretic coatings

At the end of Lesson 13 you should be able to:

- 13.1 Explain the electrophoretic coating process.
- 13.2 Understand the difference between anodic and cathodic deposition.
- 13.3 Explain the autophoretic coating process.
- 13.4 Give the advantages and disadvantages of electrophoretic and autophoretic processes.

Lesson 14 - Speciality coatings

At the end of Lesson 14 you should be able to:

- 14.1 Explain how photoresists work.
- 14.2 Understand intumescent and thermal barrier coatings.
- 14.3 Describe the benefits and applications of metal loaded paints.
- 14.4 Discuss the benefits of antifouling paints.
- 14.5 Discuss the advantages of the duplex coating system of galvanised steel plus paint.

SECTION F - PLANT AND EQUIPMENT

Lesson 15 - Drying and Curing

At the end of Lesson 15 you should be able to:

- 15.1 Explain the differences between drying and curing.
- 15.2 Review various types of oven.
- 15.3 Explain the process of infrared curing.
- 15.4 Understand new radiation curing technologies.

Lesson 16 - Transporting Coating Materials

At the end of Lesson 16 you should be able to:

- 16.1 Appreciate the necessity to handle coating materials with care.
- 16.2 Review the various methods for feeding liquid materials to applicators.
- 16.3 Have a basic understanding of paint circulation systems.
- 16.4 Understand the importance of air movement in the coating application process.
- 16.5 Review the operational facilities provided by spray booths and flash-off areas.
- 16.6 Have an understanding of the process for overspray capture and removal.

Lesson 17 - Ancillary Operations

At the end of Lesson 17, you should be able to:

- 17.1 Know the importance of good design of jigs and fixtures.
- 17.2 Describe different methods for the stripping of coatings.
- 17.3 Know the advantages and disadvantages of different coating stripping techniques.
- 17.4 Understand the need for masking parts of components when coating.
- 17.5 Understand the benefits of automation and robots for spraying operations.

SECTION G - SERVICES

Lesson 18 - Water Chemistry, Utilities and Prime Services

At the end of Lesson 18 you should be able to:

- 18.1 Appreciate the meaning and purpose of utilities and prime services in the Paint Shop.
- 18.2 Realise the importance of water and know what it is.
- 18.3 Be aware of the properties of water.
- 18.4 Know about the treatment of water.
- 18.5 Be aware of the quality of deionised water.
- 18.6 Appreciate the value of water as a heat transfer fluid for cooling and heating.
- 18.7 Understand the key properties of utilities and services.
- 18.8 Be knowledgeable of the Factory Coding System.

SECTION H - CONTROLLING THE PRODUCT AND THE PROCESS

Lesson 19 - Testing of Coatings

At the end of Lesson 19 you should be able to:

- 19.1 Describe standard methods of ensuring that coatings meet quality standards.
- 19.2 Review test methods for assessing the visual properties of coatings.
- 19.3 Review test methods for assessing the mechanical properties of coatings.
- 19.4 Review test methods for assessing the environmental performance of coatings.
- 19.5 Understand the limitations of accelerated corrosion tests.

Lesson 20 - Troubleshooting Coating Defects and Process Control

At the end of Lesson 20, you should be able to:

- 20.1 Know how to identify the most common causes of problems.
- 20.2 Know how to inspect coatings.
- 20.3 Know how to troubleshoot.
- 20.4 Appreciate the benefits of process control.
- 20.5 Know how to use control charts.
- 20.6 Know about failure mode analysis.

SECTION I - HEALTH, SAFETY AND ENVIRONMENTAL ISSUES IN SURFACE FINISHING

Lesson 21 – Health, Safety and Environmental Legislation

At the end of Lesson 21, you should be able to:

- 21.1 Understand what is required of an employer under the Health & Safety at Work Act (1974).
- 21.2 Understand what is required of an employee under the Health & Safety at Work Act (1974).
- 21.3 Be aware of the requirements of Control of Substances Hazardous to Health (COSHH).
- 21.4 Understand the need for risk assessments and their relevance to COSHH and the Health and Safety at Work Act.
- 21.5 Be aware of the use and meanings of Risk and Safety phrases.
- 21.6 Be aware of REACH.
- 21.7 Understand the role of the Environmental Protection Act and how it relates to surface finishing.
- 21.8 Be aware of other legislation that may affect the processes used in surface finishing.

Lesson 22 – Health and Safety Hazards and Precautions

At the end of Lesson 22, you should be able to:

- 22.1 List and identify the most important items of safety equipment in a surface finishing department.
- 22.2 Identify the most common hazards to be found in the workplace.
- 22.3 Be aware of specialist hazards to be found in different type of surface finishing areas.
- 22.4 Know how to avoid any short- and long-term effects of these hazards.
- 22.5 Know how to avoid a fire and to mitigate its effects.
- 22.6 Discuss the importance and role of training in the prevention of accidents.
- 22.7 Be aware of the hazards in the painting environment.
- 22.8 Know how to design plant and equipment for painting to reduce the risk of accidents.

Lesson 23 – The Treatment and Disposal of Finishing Wastes

At the end of Lesson 23, you should be able to:

- 23.1 Discuss how the discharge of hazardous effluents can cause danger, damage or loss.
- 23.2 List the main hazardous wastes from Surface Finishing.
- 23.3 Explain how heavy metal ions can be removed by alkaline precipitation and flocculation.
- 23.4 Discuss how to minimise the amounts of waste produced.
- 23.5 Discuss methods for reducing water usage.
- 23.6 Identify how energy is wasted.