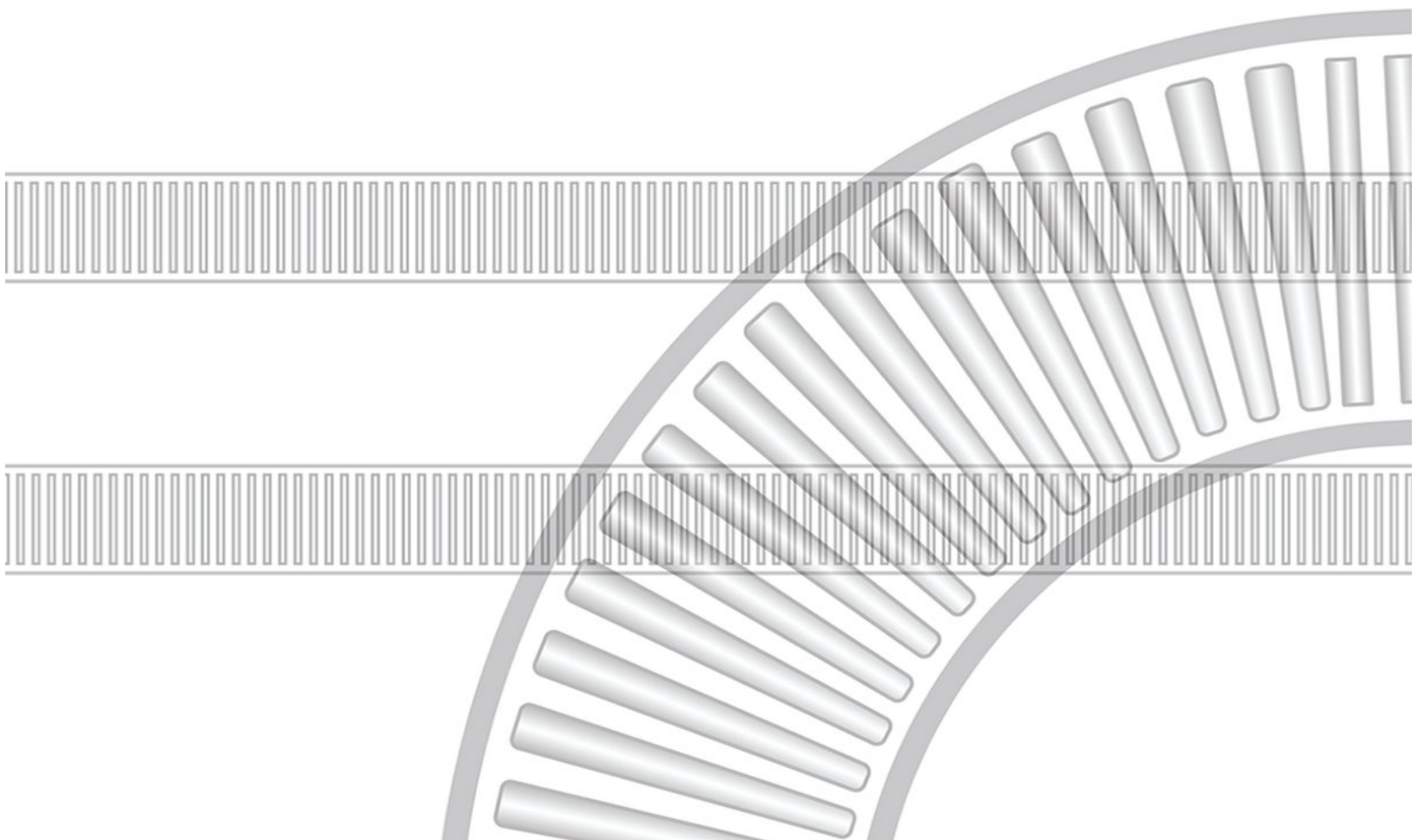




# InControlWare® 2.01.24

## User Guide

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# About This Guide

1

## 1.1 Introduction

This guide describes the common elements of the InControlWare® user interface. The key presses, mouse movements, navigation techniques, menus, panels, and dialog boxes described in this document are implemented throughout InControlWare.

## 1.2 Documentation Conventions

Many typographical conventions are used to distinguish between the different kinds of information, as follows:

Convention	Description
<b>Bold</b>	Used to identify menu selections, toolbar selections, and section references.
<i>Italic</i>	In paragraph text, italics identify the titles of documents that are being referenced. When used in conjunction with the Code text described below, italics identify a variable that should be replaced by the user with an actual value.
monospace text	Text that represents programming code.
monospace italic text	Variables in programming code.
CTRL+X	A combination of keystrokes that are pressed simultaneously.
Function   Function	A path to a function or dialog box within an interface. For example, “Select <b>File</b>   <b>Open</b> ” indicates that you should select the Open function from the File menu.
( ) and	Parentheses enclose optional items in command syntax. The vertical bar separates syntax items in a list of choices. For example, any of the following four items can be entered in this syntax:  persistPolicy (Never   OnTimer   OnUpdate   NoMoreOftenThan)

## 1.2.1 Notes, Tips, and Important Information

The following callouts and icons are used to highlight information throughout this guide:



### Note or Tip

A Note highlights related information or information that is tangential to the topic being discussed. A Tip highlights useful information that can be used to simplify the tasks that are being discussed.



### Important

Important callouts are used to highlight information of great significance or value that the reader should be certain to know before proceeding.

Notes, Tips, and Important callouts are used to call attention to useful information and are not safety notices.



# User Interface

## 2

### 2.1 Overview

Intelligrated uses an intuitive user interface for its software products. This user interface is based on standard Microsoft Windows technology and leverages this technology to provide a complete front-end for systems being controlled by InControlWare. A security system, requiring a user name and password, is built into the interface and controls access to the functions.

The user interface software provides visibility into current system status, allows users to evaluate and control system operation, and displays performance data to support decision-making.

The user interface software may be run on any Windows-based platform that meets the minimum requirements. Most of the desktop systems found in any facility should be able to run the software, if required.

### 2.2 Hardware

A typical control system includes a Windows-based computer that is configured to serve as the System Operator Station.

### 2.3 Software

A user interface configuration within the InControlWare system can include the following functional groupings.

**Note**

The InControlWare software suite is highly configurable. The layout and grouping of functions is based on client requirements and may match those shown here, to a lesser or greater degree, or may be significantly different from what is shown here.

**Table 2-1 Sample InControlWare Functions**

Function	Description
Launch Center	Starts and stops the System Software Programs.
Command Center	Material handling system operations functions.
Support Center	Troubleshooting, support, and maintenance tools.
View Center	Graphical status display.
WCS	Warehouse Control System (WCS) for moving and tracking containers within the warehouse.
I-Watch	IntelliSort diagnostic and maintenance tools.
StART System	Used by Intelligrated installation teams for QC of mechanical and electrical installation.
ICW Utilities	Editing utilities for device names, online documentation, and other useful utilities.
ICW Reports	Reporting for production and status information.

## 2.4 Log On and Log Off

Each time you log on, you will be prompted to enter a user name and password. You may also need to specify a domain if the domain dropdown menu is displayed. If there is a single domain, or there are no domains defined, the domain dropdown menu will not be displayed. Enter a user name and password, then click the **OK** button. If the entry is invalid, a dialog box with a message is displayed.

**Note**

The dialog box appears differently depending on whether you are using InControlWare's security mechanism or your corporate network. Because of the multiple methods of authentication, a domain field being present in the Log On dialog box does not definitively indicate whether your system uses enterprise authentication (i.e., your corporate network) for security or uses InControlWare's security mechanism.

If the Log On dialog box fails to display, or if the Log On dialog box does not allow you to enter logon information, there may be a connection problem. This could be caused by configuration issues, a network issue, or a problem with the server.

If the logon fails due to problems with either the user name or password, then a logon failure message will be displayed. The actual message displayed may vary.

The InControlWare user names, passwords, and domains can be managed by a properly authorized administrator.

## 2.4.1 Logging on Without a Domain Menu Included

If your system is on a single domain or a network with no domains defined, the Log On dialog box will appear as follows:

**Figure 2-1 Log On Dialog Box**



To log in, enter your user name and password and select **OK**.

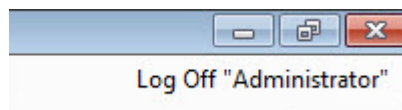


### Note

The Log On dialog box might also appear if the security policy requires a log off after a period of inactivity at the station.

If your user name and password are accepted, your name will appear in the menu bar and the display will load. The loading process sets permissions and configures display features based on the user name.

**Figure 2-2 User Name in Menu Bar**



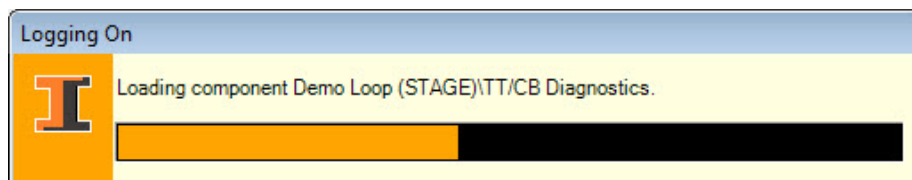
If the Log On dialog box is not displayed, a connection to the security database could not be established. This could be due to network problems or a server error. Contact a supervisor or IT support staff to resolve the issue.



### Note

The first time InControlWare is started on a machine after a software update, the loading process will take longer than it normally does. The loading process will return to normal speed at the next startup.

**Figure 2-3 Log On Progress Display**



This process sets the permissions for this operator and configures display features based on the log on.



## 2.4.2 Logging on With a Domain Menu Included

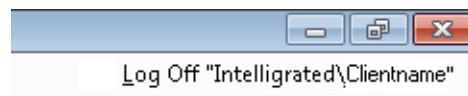
If your system has multiple domains to choose from, a domain dropdown menu will also appear in the Log On dialog box, as follows.

**Figure 2-4 Log On Dialog Box with Domain Field**



To log in, enter your user name and password and select a domain from the dropdown list. Select **OK** to enter the information. If the information is accepted, both the domain name and the user name will appear in the menu bar.

**Figure 2-5 User Name and Domain Name in Menu Bar**

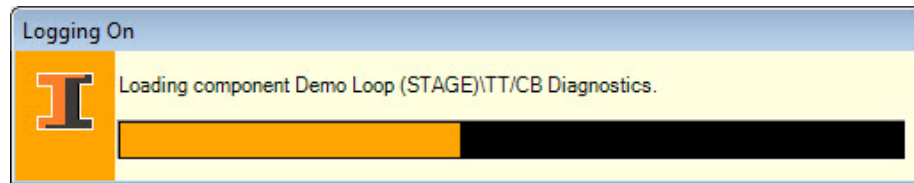


Domains are managed by an authorized administrator at the user's location. If the domain dropdown menu is present but no domains are listed, there could be an issue with the connection to the database. Contact a supervisor or IT support staff to resolve the issue.



### Note

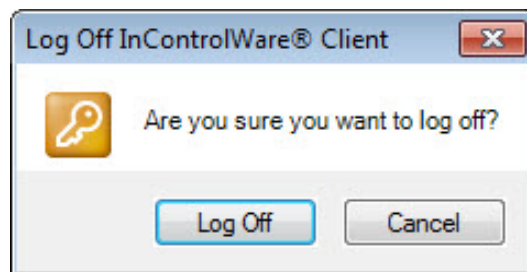
The first time InControlWare is started on a machine after a software update, the loading process will take longer than it normally does. The loading process will return to normal speed at the next startup.

**Figure 2-6 Log On Progress Display**

This process sets the permissions for this operator and configures display features based on the log on.

## 2.4.3 Logging Off

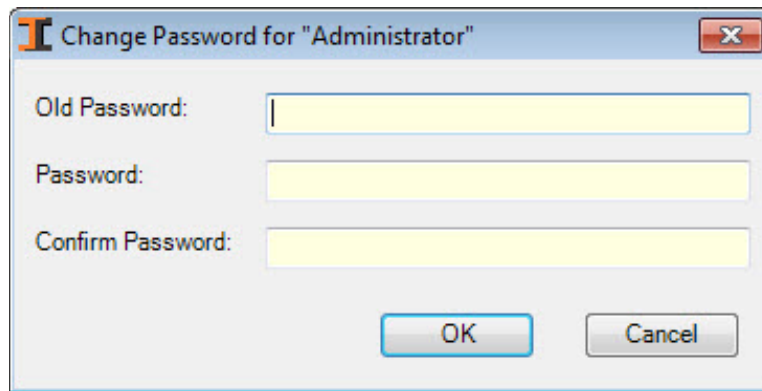
Clicking the **Log Off** menu item displays a Log Off confirmation dialog box. Selecting **Log Off** unloads all panels, clears the display, and causes the Log On dialog box to appear. The previous login information is cleared. Selecting the **Cancel** button closes the dialog box without logging off.

**Figure 2-7 Log Off (Right Side)****Figure 2-8 Log Off Confirmation**

## 2.4.4 Changing the Password

If you have the needed permissions assigned, you can change the password by completing the following process. You must be logged on to the system to change your password.

1. Select **Administration | Change Password**. The Change Password dialog box appears.



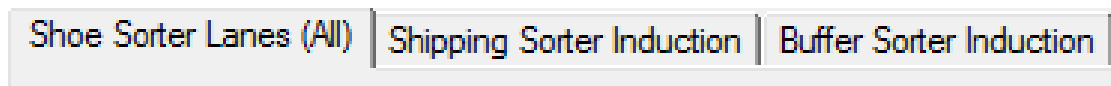
2. Enter the current password in the **Old Password** field.
3. Enter a new password in the **Password** field.
4. Enter the new password a second time in the **Confirm Password** field.
5. Select **OK** to exit the dialog box and save the new password.

## 2.5 Common Features

The InControlWare user interface is built around a common framework. The look and feel will be familiar to anyone who uses Windows products. The user interface employs menus, a toolbar, and a status bar surrounding a multi-panel display.

The display area contains panels that often, though not always, have a tab at the top. The exact arrangement of these panels is unique to each customer. In some cases, panels are large, covering most of the display area. In other cases, the display area is divided to create smaller spaces within which panels reside. Whether the panels are large or small, many panels can exist in the same space. In such cases, the panel of interest is chosen by clicking on the tab, which is usually located at the top of the panel.

**Figure 2-9 Multiple Tabs**





## Note

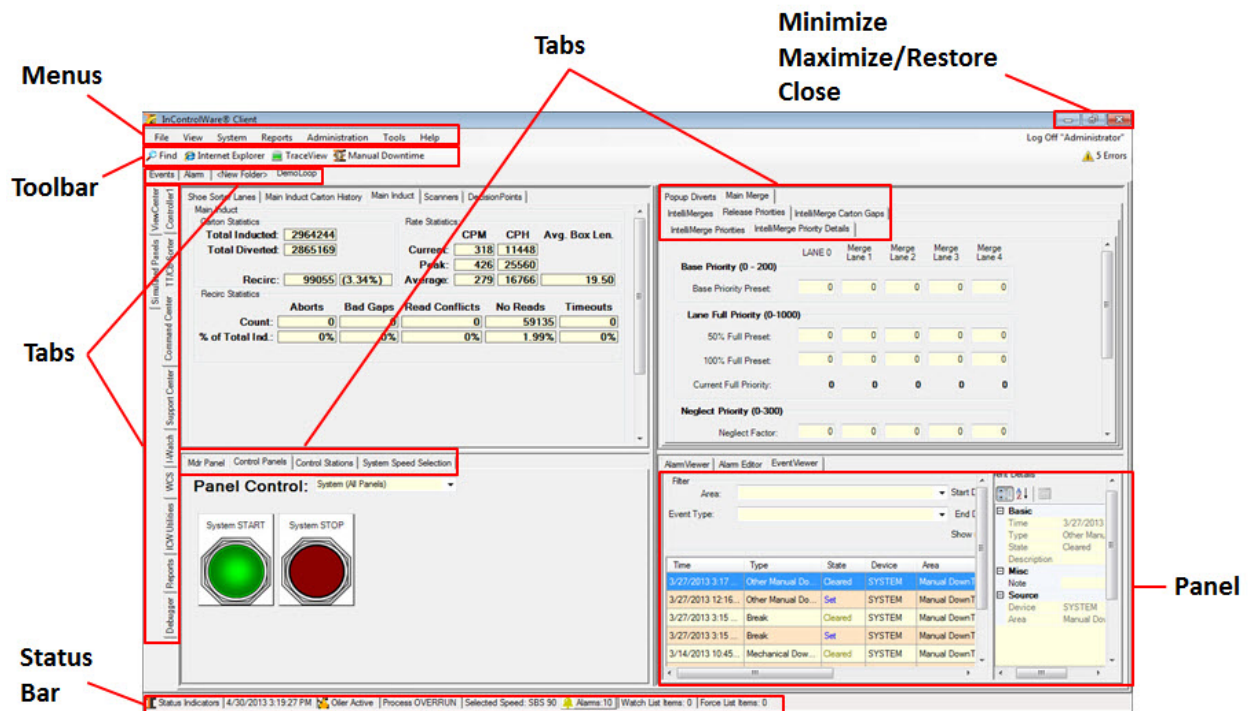
To temporarily make a small panel large, double-click on its tab. Double-click on the tab again to return it to its usual size and location.

When the panels are small, their size may be changed by grabbing the splitter that divides the display into separate spaces and dragging it to resize the panels. Depending on how the display is divided, both horizontal and vertical adjustments may be made to accommodate better viewing of the content. These settings are saved when the program is stopped and restored when it is restarted.

The panels that are visible, and the location of those panels, may differ depending on the user or user group.

A snap-in may appear in a menu and show as a dialog box, or it might appear only as an item in the status bar. The information contained on panels and snap-ins is updated at a pre-set rate or may be changed to a user-defined rate.

Figure 2-10 Sample User Interface Layout





## 2.6 Toolbar

The toolbar, located beneath the menus, can display a number of buttons that launch other applications or provide special functions. These require only a single click to start the application or function. The buttons can be configured as desired for each system. Each button is configured to include a name and/or a small icon or image on the button. Configuration is done by the engineering team during installation of the system.

Buttons can launch any program available to the client station, including standard applications like Notepad, Word, etc. These are defined as part of the configuration used by the user interface applications. Special function buttons appear in the toolbar when they are part of a snap-in or panel. An example is the **Manual Downtime** button, which is part of a snap-in that allows users to enter system downtime information manually.

Holding the mouse over a button in the toolbar may show a tool tip with further information about the program or function being launched. Clicking on a button that is unable to launch its application will cause a message box to be displayed. This is usually the result of a program being uninstalled.

## 2.7 Status Bar

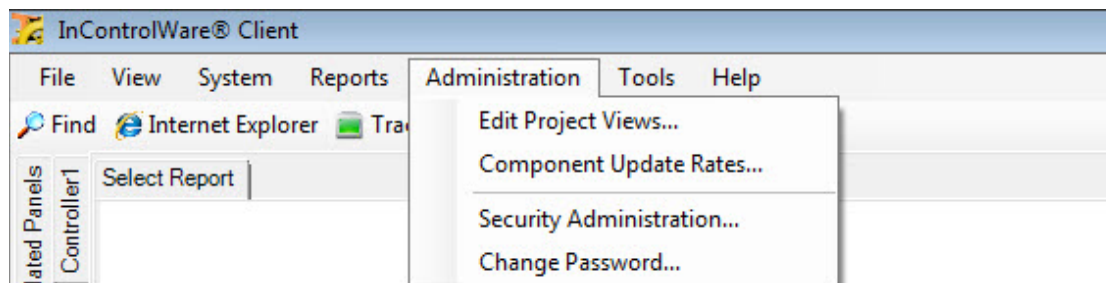
The Status Bar, located at the bottom of the window, displays status information even when the related panel is not visible. A status bar item is directly related to a panel or a snap-in. For example, the Alarm count, Watch List Items count, and Force List Items counts are visible in the status bar even when the corresponding panels are not visible. These panels must be configured into the application for the item to appear in the status bar.

## 2.8 Menu Bar

The Menu Bar operates like a standard Windows menu. When the menu item is selected using the mouse or a keyboard stroke, a menu is displayed. The content of each menu is specific to the configuration of the system and the permissions allowed for the current user. Menu items are added or removed from the menus by panels and snap-ins. Security settings enable and disable items based on the user login.

You can move the mouse or use the up and down arrow keys to select the desired menu item. Click the selected item or press the **Enter** key to cause the menu action to start.

**Figure 2-11 Dropdown Menu**



Items that are grayed out cannot be accessed. This may be for any one of three reasons:

1. The user may not have proper authorization (a security system function).
2. The function may not be installed for this system.
3. The selection may not be appropriate at the current time.



The standard items found on the menu bar include the following:

**Table 2-2 Dropdown Menu Information**

Function	Description
File Menu	Contains a selection to exit the application (Ctrl+Shift+Q).
View Menu	Restores the panel from the full screen mode to its normal size.
System Menu	Includes Communication Status showing the connection state for remoting channels, each controller or database in the system, and various other menu items as defined by the panels and snap-ins used in each system. These functions are all protected by the security system to prevent unauthorized use.
Reports Menu	Contains a list of the reports available to the current user. This list is dependent on the features included with the system and may be protected by the security system. This menu item is hidden or grayed out for users who do not have reporting privileges.
Administration Menu	Contains several functions including Edit Project Views, Component Update Rates (allowing changes to update timing on each panel), Security Administration (to add and maintain system users), and Change Password (so the current user can change their own password).
Tools Menu	Contains an Options menu item for user-specific, system-wide options.
Help Menu	Provides access to an About InControlWare® Client dialog box that displays version information for InControlWare software modules. This dialog box also features a System Info button that provides hardware, software, and system information for Intelligrated technical support personnel.

Once a user has logged in, an additional menu item will appear to allow the user to log out. This item is located on the far right side of the menu bar. This menu item displays the name of the user who logged on to the system. Selecting this menu item allows the user to log out and present the Log On dialog box for a new user.

## 2.9 System Info

System Information is found in **Help | About InControlWare® Client**. Click the **System Info** button to display a dialog box that provides information about the operating hardware and software of the computer running the application. Technical Support may request this information under some circumstances.

Figure 2-12 System Info Button

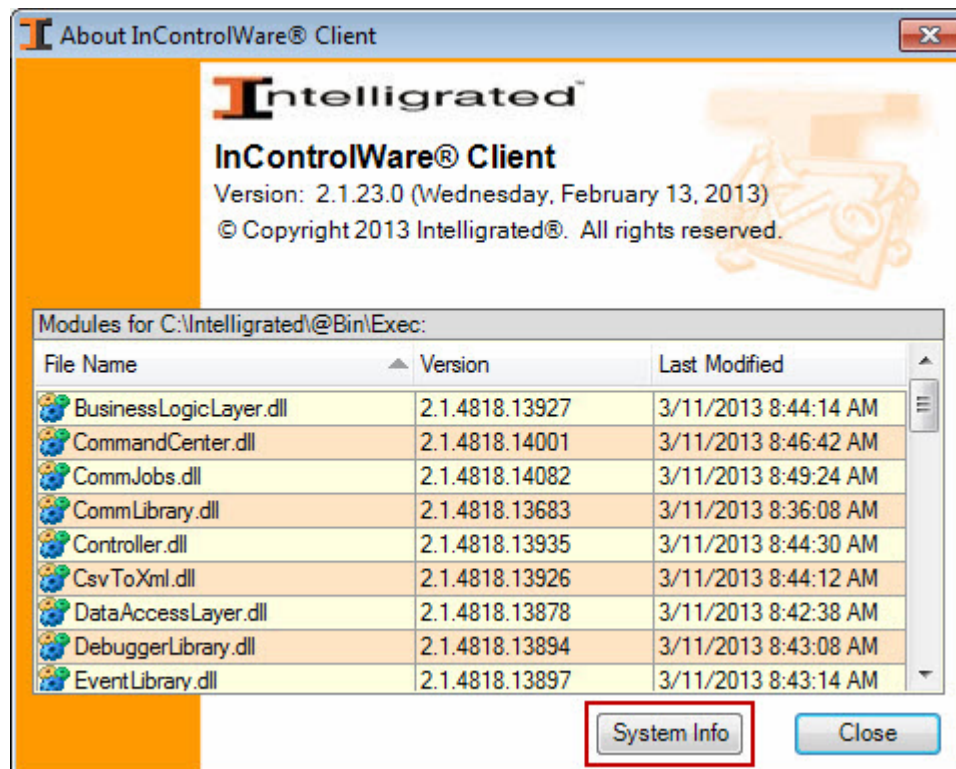
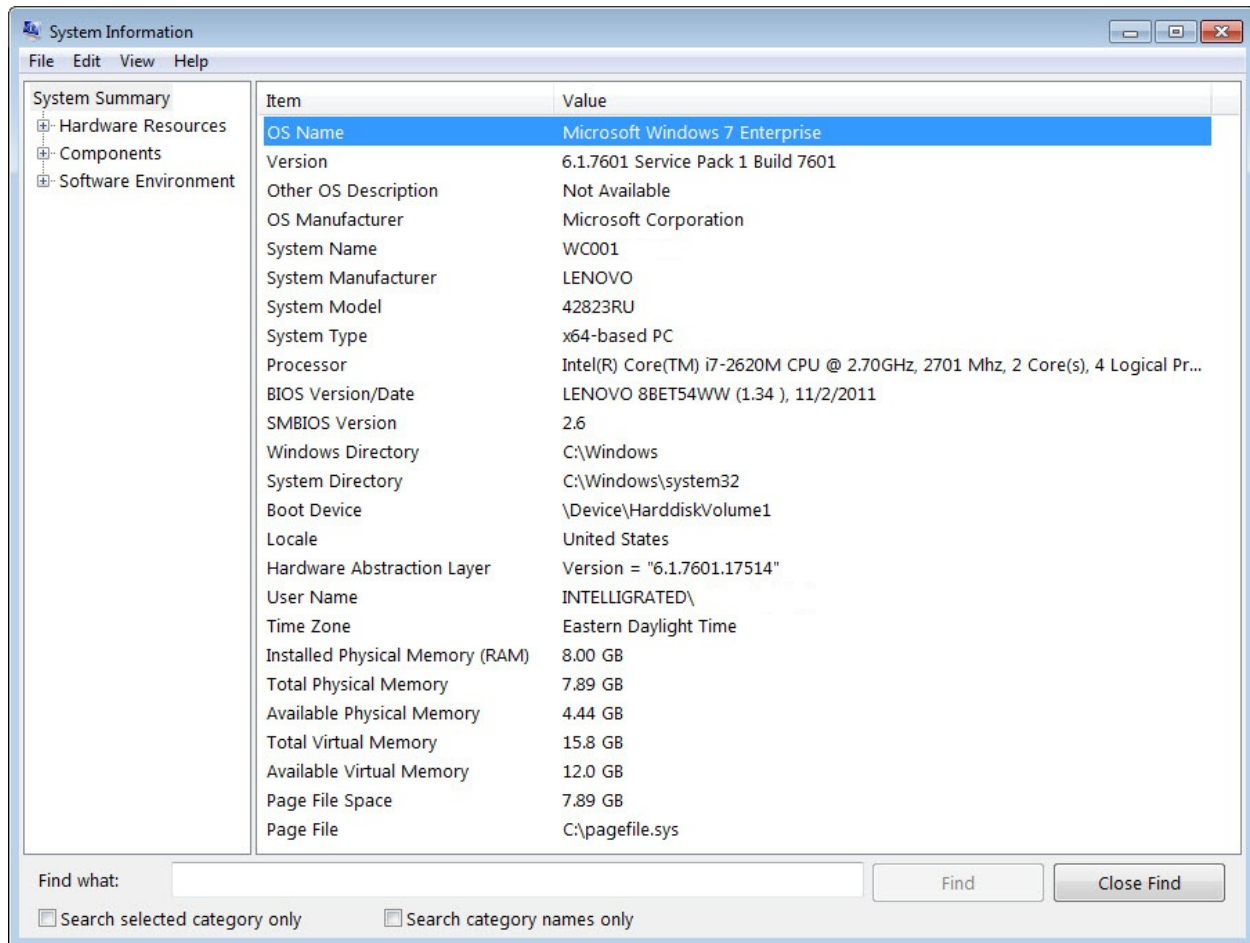




Figure 2-13 System Information

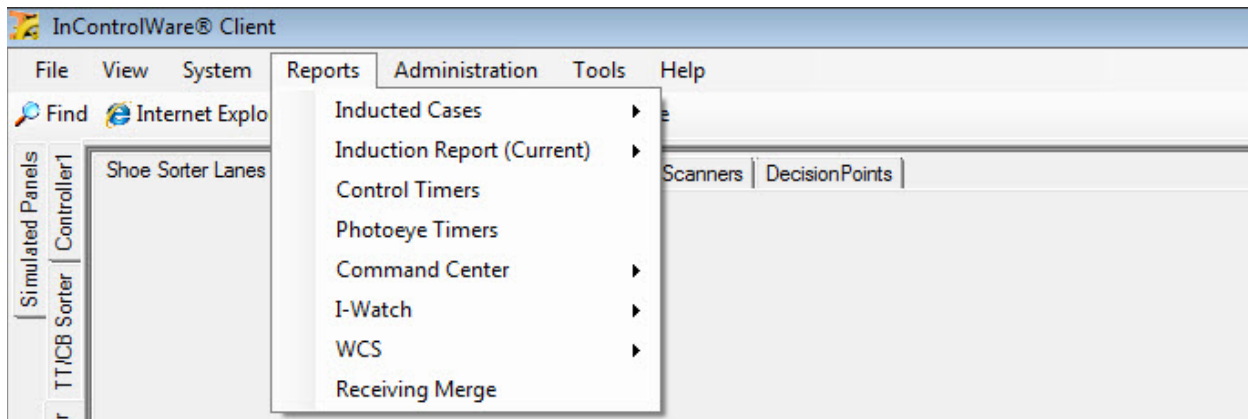
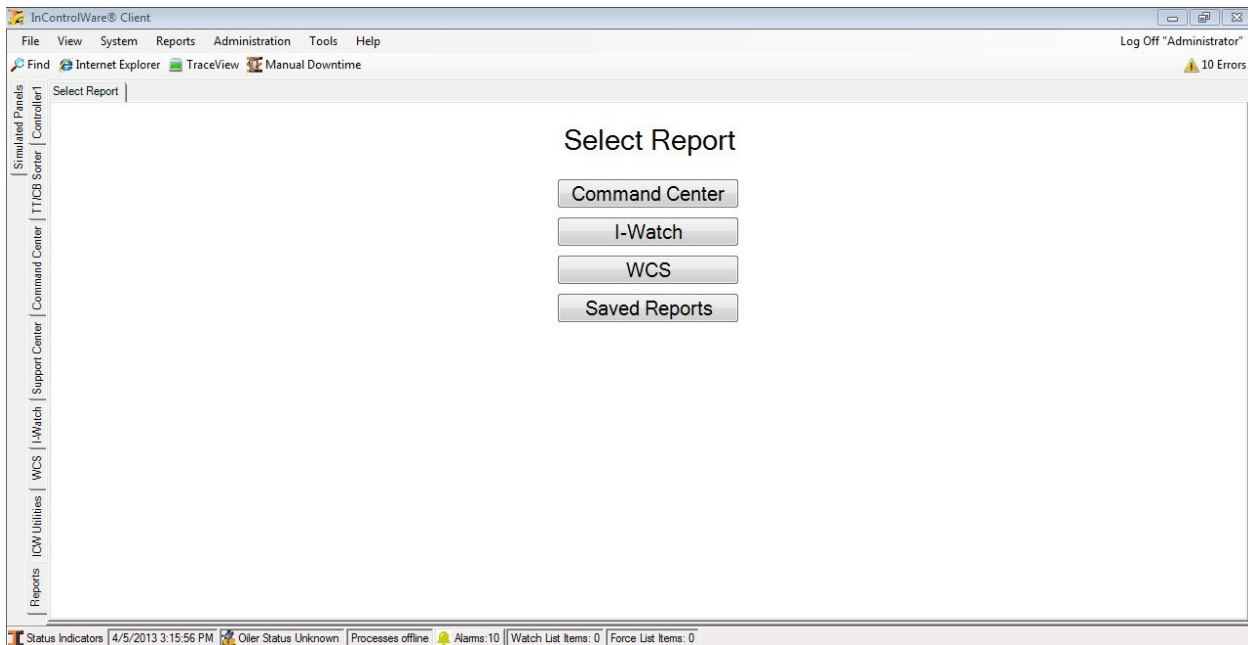


The **System Information** dialog box is part of the Windows Operating System (not InControlWare) that controls its appearance and the type of information it displays.

## 2.10 Reporting

The entire **Reports** menu and specific choices within it are enabled and disabled based on the user login. Selecting a menu item from **Reports** displays the report or a dialog box with selection criteria. Each report can have its own selection. It also provides a method of searching for specific data within the report.

Reports are accessible from the **Reports** menu or from the InControlWare **Reports** panel. However, the InControlWare **Reports** panel must be included in the customer configuration to view reports using this method.

**Figure 2-14 Reports Menu****Figure 2-15 Typical InControlWare Reports Panel**

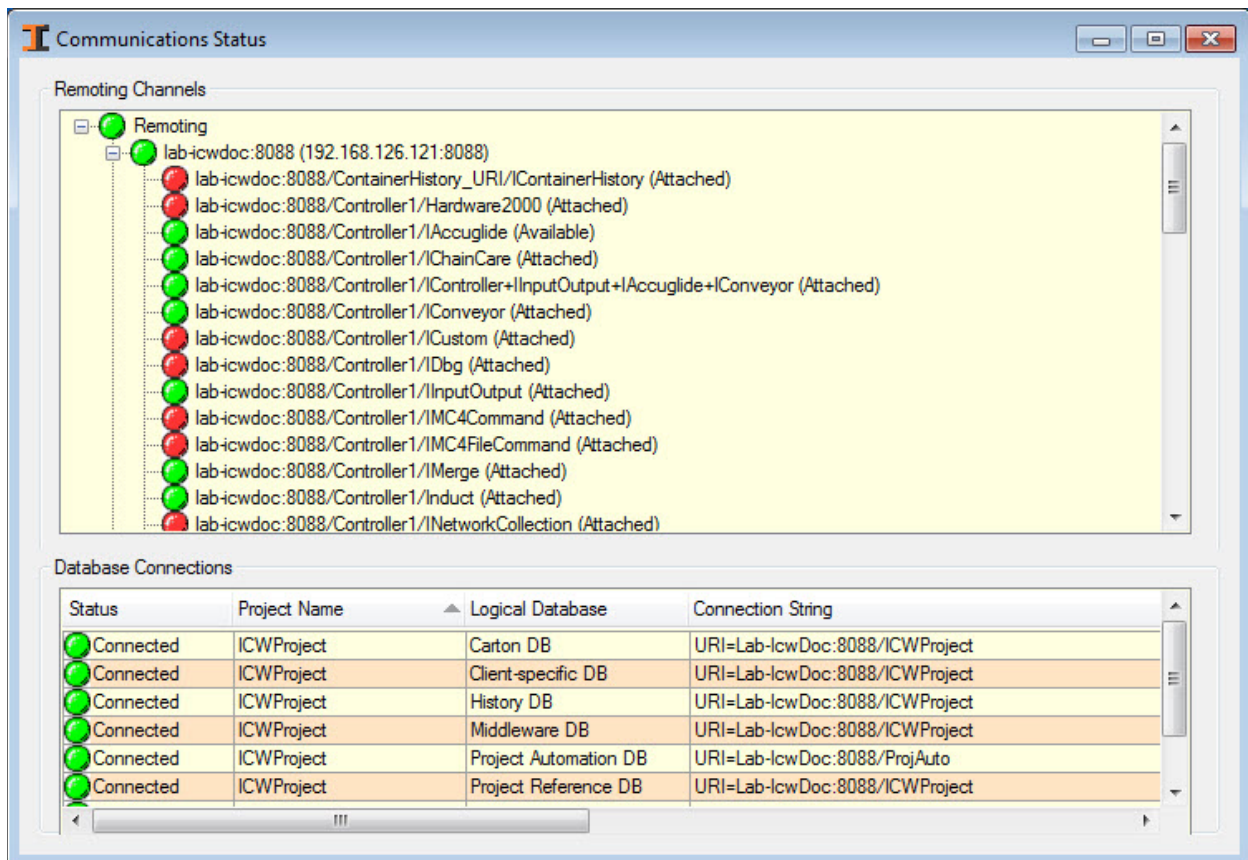
The reporting function provides a preview of the pages in the report before it is printed. You can view one page at a time. The Report Viewer toolbar displayed at the top of the report allows you to page through, print, zoom, or save the report. It also provides a method of searching for specific data within the report.



## 2.11 Communication Status

Communication Status is a menu item found in the **System** dropdown menu. It displays a dialog box with information about this program's connection status. The User Interface can be connected to multiple control processors and multiple databases. The status of each connection can be found in this dialog box.

Figure 2-16 Communications Status



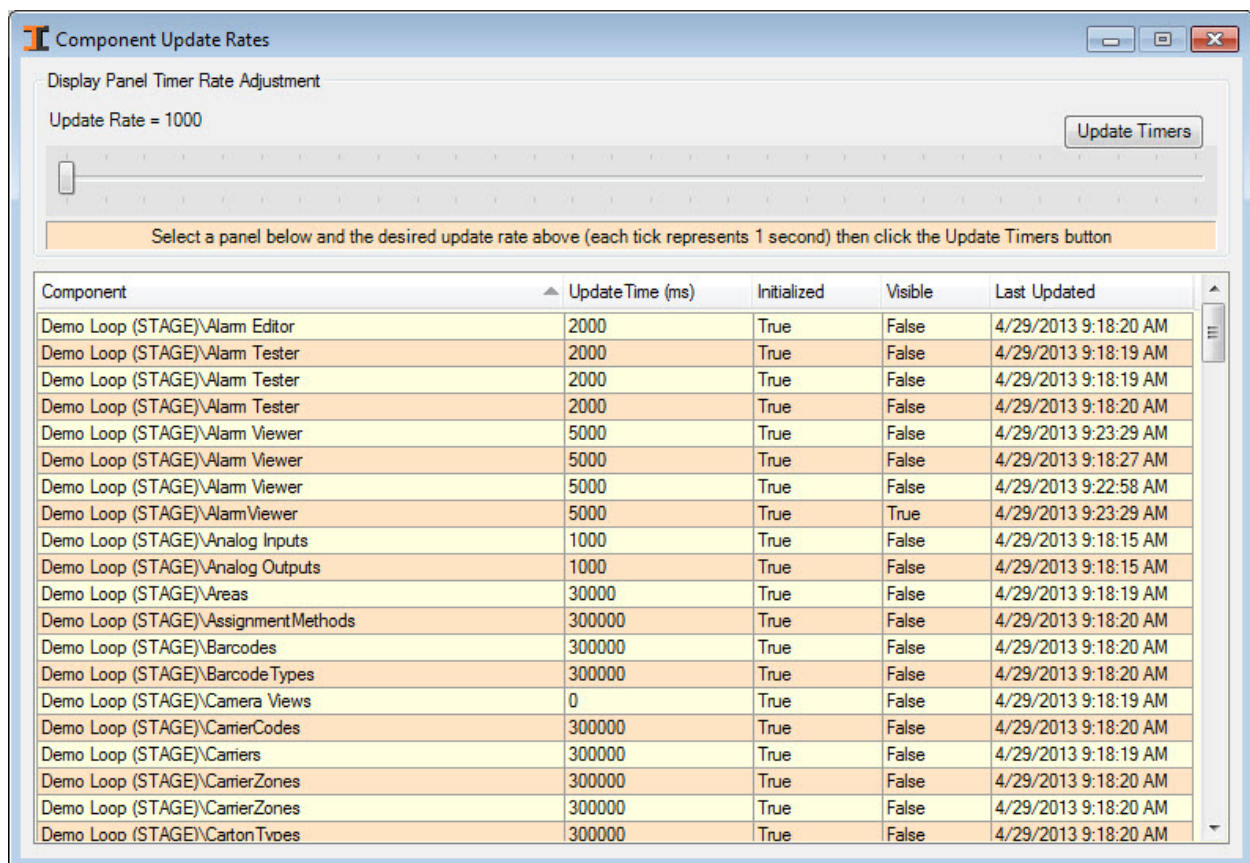
The upper box displays a list showing the status of each remoting channel connection, as well as hosts and services. A light green LED indicates that an item is connected and is online; it is communicating with the interface. A dark green LED indicates an item not configured. A yellow LED indicates that an item is connected, but a needed resource that it is depending on to get information from is not communicating with it. A red LED indicates that an item failed a connection. The User Interface can tolerate disconnections and will reconnect when the controller is available again. This allows the network cable to be disconnected for a few minutes without having to stop the application.

The lower box displays the connection status of the databases. A database can be Connected, Not Connected, or Not Used.

## 2.12 Component Update Rates

**Component Update Rates** is a menu item found in the **Administration** dropdown menu. It displays a dialog box with a list of loaded components. There is a time value associated with each item that updates. This time value may be adjusted to better meet the requirements of a specific client station. Items that are highlighted in gray have an **N/A** status in the **Visible** column. You cannot change the update rates of these items.

Figure 2-17 Component Update Rates



To change an update time, select the item in the list, then drag the slide bar at the top of the display to the desired value. Click the **Update Timers** button to save the value.



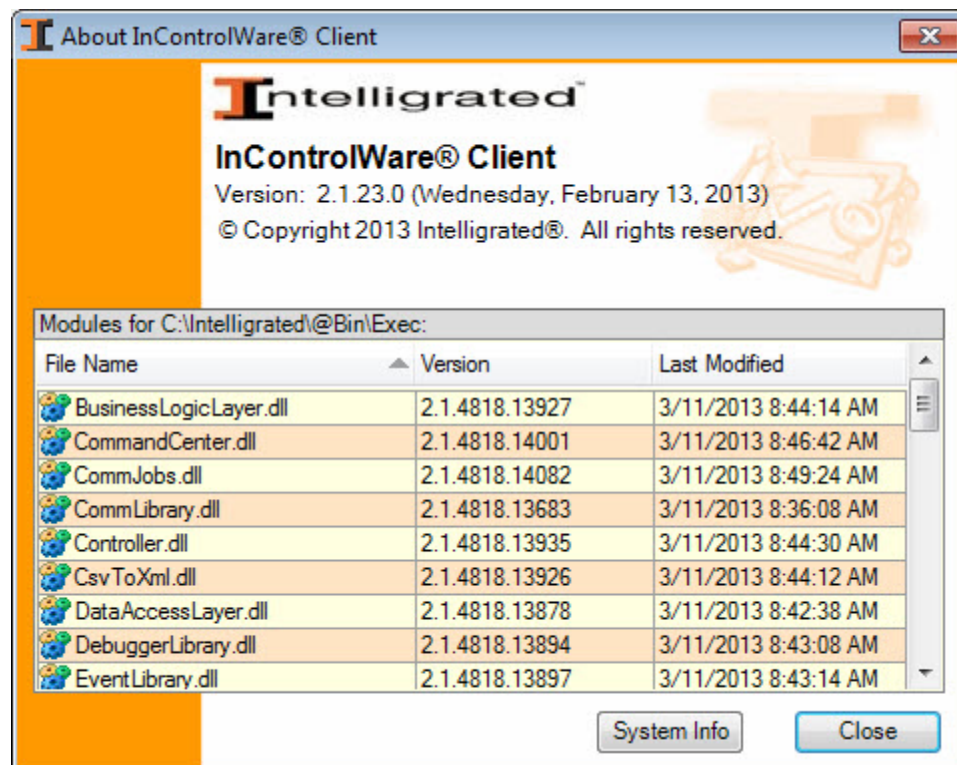


InControlWare User Interfaces have a time management scheme that protects the system from becoming bogged down by idle stations. Under this scheme, only the panels being displayed are actually updated. There are a few exceptions, like alarms, but generally this means that only a few panels demand attention at one time. In addition, if the program has been idle for five (5) minutes, or after it has been minimized, the update rates increase. This compensates for users who might start the application and then leave the station with a number of update-intensive displays showing. A couple of stations in this state can reduce the responsiveness of the whole system. As soon as the user restores the program or begins to use it again, the original time values are restored.

## 2.13 About

The About item in the **Help** menu displays the version number of the program and a list of all of the assemblies loaded. This is only of benefit to technical support when verifying that the correct version is installed and operating.

**Figure 2-18 About InControlWare Client**



## 2.14 Tool Tips

Most panels have tool tips to aid in understanding the details of particular fields or buttons. While this is useful, sometimes it may be desirable to turn these off. This is a global feature, which means that tool tips are On or Off for all tabs. The **Show Tool Tips** checkbox is available on the **Tools | Options** dialog box and on the context menu of some panels. This status is saved when the program exits and is restored when it starts.

## 2.15 More Device Detail Dialog Box

Panels that show devices usually have a More Device Detail dialog box. This box may be displayed from a right-click menu (context menu) or from a button. Selecting an item in a panel and then right clicking displays the context menu. The **More Details** menu item is usually the first item on the menu. Selecting it will display the dialog box or an error message. The error appears because the item could not be found in the project database, the database connection could not be made, or the selected item does not include a device ID.

If the device ID is found in the project database, the **More Device Detail** dialog box appears. This box displays useful information about the selected device and provides links to further information.



Figure 2-19 Sample More Device Detail Dialog Box

Table 2-3 Sample More Device Detail Information

Item	Description
User Name	The name assigned by a user that is displayed instead of the device ID assigned by Intelligrated. If this box is enabled you are authorized to change the name. Click <b>OK</b> to save the changed name. Click <b>Cancel</b> to ignore the change.
Device Type	The category to which this device belongs.
Intelligrated Part Number	The Intelligrated part number for this device. This is the number used to order a replacement part.
Manufacturer	The original equipment manufacturer.
Mfg Part Number	The original equipment manufacturer's part number.
Mfg Contact Information	Provides limited contact information for the original equipment manufacturer.
Controller (System) ID	An Intelligrated-assigned number for this device. This is only assigned to devices that connect to the I/O network.
Location	The installed location for this device.
Terminal	The wiring terminal used for this device, as identified in the electrical schematic.

Item	Description
Network Address	The logical network address for the device.
Page and Line Number	A page and line number in the electrical schematic where this device can be found. This field also includes a View button, which is explained further on the following page.
Documentation	A dropdown menu provides a list of related documents for the device.
Web Site	A button to open a website for the manufacturer.
Online Parts Catalog	A button to open the Intelligrated Online Parts Catalog.
Description	A brief description assigned to the device in the electrical schematic.

Some fields may be empty. This usually means the information does not apply to the device selected. For instance, a device that does not connect to the I/O network does not show a Network Address.

The **Page and Line Number** field also has a button that displays the schematic page listed in the text box. The schematics are stored on the server in the Documentation folder. Click the **View** button to launch a viewer to display the page. Schematics are typically stored in PDF format, but may be stored in DWG format instead. If there is a problem displaying the page, an error message will appear.

A dropdown menu containing a list of other documents related to this device is also shown in the dialog box. If a selected document is unavailable, the server is unavailable, or the program required to view a document does not exist on this system, a message will explain the reason.

Two buttons are provided for systems that have internet access. If they are enabled, you can link directly to the Intelligrated Online Parts Catalog or to the original equipment manufacturer's web site with a single click. Click the **Online Parts Catalog** or the **Web Site** button to launch the default browser for the client station and display the content requested.

Click the **OK** or **Cancel** button to close the display. These buttons operate the same way unless a change has been made to the user name. If the user name was changed, clicking the **OK** button saves the new name and clicking the **Cancel** button ignores the new name.

## 2.16 Aliases

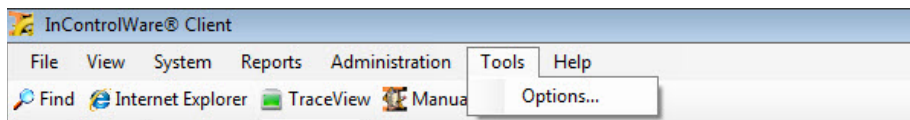
InControlWare allows aliases to be used in the place of standard names. An alias is a name you create that appears in the InControlWare **Name/Alias** column(s) instead of the standard name. This method allows you to create names that may be more descriptive or more easily understood than standard names.

If the display of aliases is not activated, then standard names appear in the list display. If the display of aliases is activated, then aliases or a mixture of aliases and standard names appears in the list display. If an alias exists, InControlWare shows the alias. If no alias exists, InControlWare shows the standard name.

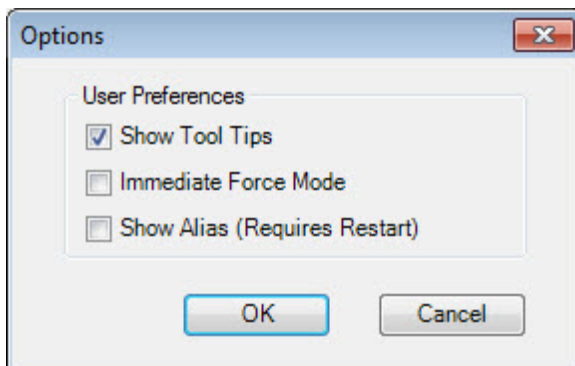
To activate the display of aliases:

1. Select **Tools | Options** from the dropdown menu. The **Options** dialog box appears.
2. Check the **Show Alias (Requires Restart)** checkbox.
3. Log off then log on to activate the display of aliases.

**Figure 2-20 Tools Options**



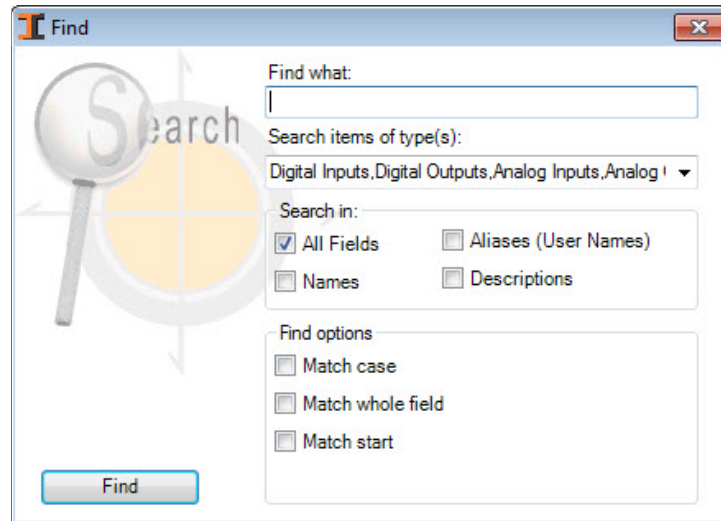
**Figure 2-21 Options Dialog Box**



## 2.17 Find

The **Find** button is located in the Toolbar, if it is included in your customer configuration. This button opens the **Find** dialog box, which offers a variety of search options.

**Figure 2-22 Find Menu**



The items in the **Find** dialog box include the following:

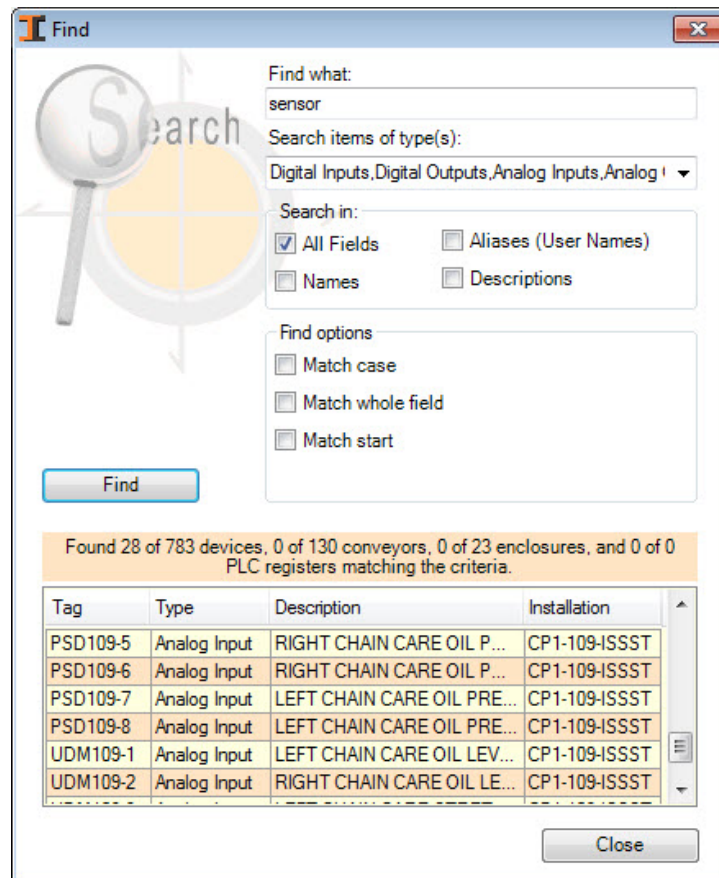
**Table 2-4 Find Menu Information**

Item	Description
Find What	Type the desired string of characters to find.
Search Items of Type(s)	The item types are: Digital Inputs, Digital Outputs, Analog Inputs, Analog Outputs, Drives, Equipment, PLC Registers, Conveyors, and Enclosures. All types are selected by default. In the dropdown menu, uncheck any box for any types you do not want included.
Search In	All Fields is the default selection. You can select any combination of Names, Aliases (User Names), and Descriptions for results by checking their appropriate boxes.
Find Options	Select any combination of Match case, Match whole field, and Match start by checking their appropriate boxes.
Find Button	Select this button to display the Find results.



An example of the results dialog box after selecting the **Find** button is shown below.

**Figure 2-23 Sample Find Menu Results**



The items in the results section of the **Find** dialog box include the following:

**Table 2-5 Sample Find Results Information**

Function	Description
Tag	Shows the user name or alias for the device.
Type	Shows the type of device.
Description	An identifying description of the device.
Installation	Shows the control panel that is powering the device and also shows the device's conveyor.
Close button	Select the Close button to exit the Find dialog box.





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