Honeywell

Experion PKS

Collaboration Station User's Guide

Release 431

Honeywell

Document	Release	Issue	Date
EPDOC-X245-en-431A	431	0	February 2015

Disclaimer

This document contains Honeywell proprietary information. Information contained herein is to be used solely for the purpose submitted, and no part of this document or its contents shall be reproduced, published, or disclosed to a third party without the express permission of Honeywell International Sàrl.

While this information is presented in good faith and believed to be accurate, Honeywell disclaims the implied warranties of merchantability and fitness for a purpose and makes no express warranties except as may be stated in its written agreement with and for its customer.

In no event is Honeywell liable to anyone for any direct, special, or consequential damages. The information and specifications in this document are subject to change without notice.

Copyright 2015 - Honeywell International Sàrl

Contents

CONTENTS

About this guide

This guide is intended to assist you in planning, installing, configuring, and operating Collaboration Station. It is intended for Collaboration Station users and for engineers and system administrators who are responsible for the configuration, administration, and maintenance of Collaboration Station.

Prerequisite skills

This guide assumes that you have knowledge of other Experion software and concepts where relevant. It is assumed that anyone planning and installing Collaboration Station is familiar with the existing Experion configuration and local site requirements. For Collaboration Station configuration, knowledge of HMIWeb Display Builder is assumed. This guide also assumes that you are familiar with the Microsoft Windows operating system and the hardware and software that you are using.

Related documents

The following documents complement this guide. They contain additional information which may be useful for reference when planning, installing, and configuring Collaboration Station.

Document	Description
HMIWeb Display Building Guide	Describes how to create custom displays.
Collaboration Station specification	Includes hardware specifications and supported topologies. The latest specification document is available from the Process Solutions website (http://www.honeywellprocess.com)
eServer documentation: • *Server and Client Planning Guide* • *Server and Client Configuration Guide*	For more information about eServers, see "eServer" in the *Server and Client Planning Guide* and "Configuring eServer" in the *Server and Client Configuration Guide*.

Revision history

Revision	Date	Description
A	February 2015	Initial release of document.

About Collaboration Station

Collaboration Station is a licensable option of Experion. A Collaboration Station is a type of Experion Station that presents your operation on a large interactive touchscreen in a view designed to facilitate communication and collaboration.

Collaboration Station is highly flexible and can be customized to meet the collaboration requirements at your facility. It is intended for use whenever two or more people need to discuss operational matters and share relevant material. This might include operational meetings such as shift handovers, troubleshooting meetings to diagnose and solve problems, and facility showcases.

Collaboration Station integrates with the Microsoft Lync Unified Communications platform to enable remote collaboration.

Collaboration Station can be used to gather a range of key content so that it is easily accessible during a collaboration. This can include Experion displays, documents, websites, and other common file types.

Planning for Collaboration Station

Ensure that you are familiar with the features and capabilities of Collaboration Station before you begin planning. For more information, see the "Operating Collaboration Station" section of this guide. If necessary, review the Getting Started tutorial on the workspace toolbar.

Figure 1: Layout of a Collaboration Station workspace

Item	Description
1	*Workspace* A workspace is a display created in HMIWeb Display Builder that represents the facility. It consists of static images, zoom regions, radial menus, dynamic content such as Experion trends, alphanumerics, alarm icons, and solution pack shapes. You can have more than one workspace configured but only one can be used at a time. To assist the Collaboration Station planning and configuration process, a number of sample workspaces are available on the Collaboration Station computer in `c:\Program Files (x86)\Honeywell\Experion PKS \client\Station\SampleCollaborationDisplays`.

Item	Description
2	*Zoom region* Zoom regions are rectangular and are used to define the areas on the workspace that can be enlarged with a single tap. They can be used as a placeholder for open content windows. Content windows opened after zooming into a region are made small after zooming out and enlarged to their original size when returning to the zoom region.
3	*Radial menu* Radial menus provide access to content and Microsoft Lync contacts. For more information about what content can be accessed from Collaboration Station, see "Software compatibility". If a radial menu is associated with an asset or location, it will display alarms for the asset or location.
4	*Content window* A new window is opened when content is accessed via a radial menu or the workspace toolbar.
5	*Workspace toolbar* When opened, the workspace toolbar provides access to help, settings, content that is not available via a radial menu, and radial menu edit mode.

Related topics

Collaboration Station design

Due to the highly flexible nature of Collaboration Station, the planning and design phase is particularly important. Careful consideration is required to get the most out of Collaboration Station.

The following tasks should be completed when planning a Collaboration Station implementation:

- Consider how Collaboration Station will be used within your organization:
    - What types of meetings will Collaboration Station be used to facilitate?
    - Who will use Collaboration Station?
    - Who will they want to collaborate with?
    - What Experion displays will they want to see?
    - What other content will they want to share?
- Design the Collaboration Station layout (the workspace). This will require careful consideration of how to present the facility in a way that is easily understood by the users and allows easy access to relevant content.
- Determine the content that will be accessible via Collaboration Station. This content will need to be available during the configuration process. Types of content include:
    - Images to be used in the background and on radial menus.
    - Dynamic content to be embedded in the workspace, such as trends, alarm icons, and solution pack shapes.
    - Experion displays to be accessed via radial menus.
    - Lists of personnel to be displayed in radial menus so that they can be contacted for remote collaboration.
    - Other content (such as webpages and documents) to be made available via radial menus.
- Determine the software that will need to be installed to deliver the content. Refer to "Software compatibility" for more information.

Related topics

"Configuring Collaboration Station" on page 19

Network and security considerations

Collaboration Station is a level 4 application (that is, it is a part of your business network) which uses an eServer to access Experion displays and, optionally, a Remote Engineering and Station Server to provide access to Experion configuration tools.

Collaboration Station provides eServer Premium (read-only) access to Experion displays. Displays can be viewed with live data and alarms but users do not have any control of the plant and cannot acknowledge alarms or update process data. Interaction is limited to navigation controls. For more information about defining scope of responsibility (SOR) so that operators can access those parts of the system for which they are responsible, see "Guidelines for defining scope of responsibility" in the "Guidelines for designing enterprise models" section of the *Server and Client Planning Guide*.
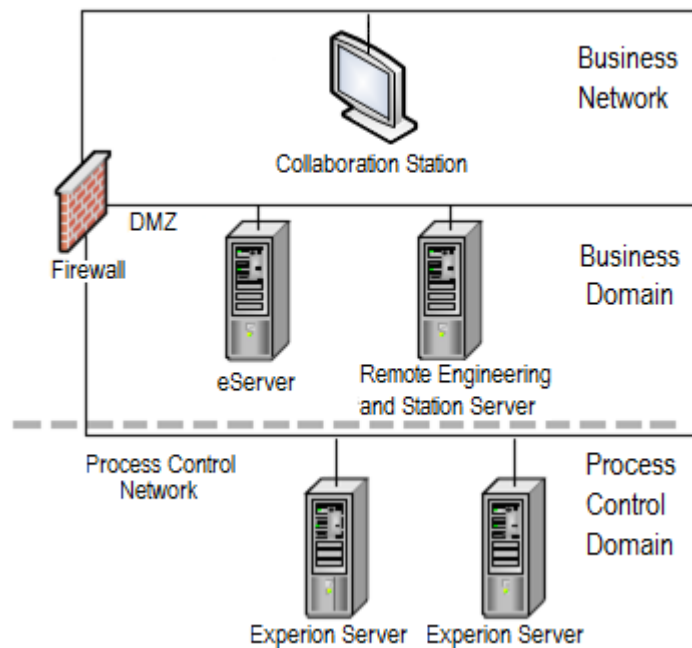
For information about Remote Engineering and Station Server (RESS), see the "Remote Engineering and Station Server" topic in the *Server and Client Planning Guide* and "Remote access for Station and Configuration Studio" in the *Network and Security Planning Guide*.

If the Microsoft Lync server is on a different domain to the eServer, RESS and process control network, then these domains should be configured to have a trust relationship with each other. This will allow a user to log on to Collaboration Station using a business domain account and have access to Lync and Level 4 applications as well as RESS RemoteApp sessions. The Collaboration Station node itself would generally be added to the business domain in this scenario.

The following table displays the firewall access requirements for eServer.

Secure Host/ Network	Destination Host/ Network	Interface	Ports/Service	Comments
Collaboration Station	eServer	Business network	50000/TCP	Premium Access

To access Experion custom displays on Collaboration Station, they should be securely copied from the eServer to the `<data folder>\Honeywell\Experion PKS\Client\Abstract` folder on the Collaboration Station node, where `<data folder>` is the location where Experion data is stored. For default installations, `<data folder>` is `C:\ProgramData`. This could be done manually or by using firewall configuration specific to this task. It is not recommended to use Experion file replication to a level 4 node.

Software compatibility

Collaboration Station supports a range of software and content that may be useful during a collaboration. Supported content includes:

- Experion HMIWeb schematics
- Microsoft Lync conversations
- Microsoft Excel workbooks
- Microsoft Word documents
- Microsoft PowerPoint presentations
- Adobe PDF documents
- Webpages
- Applications on remote computers
- Applications on the local computer. Note that 64 bit local applications are not supported

Refer to the Collaboration Station specification document for detailed information about compatibility with applications. Application software must be installed before it can be used from Collaboration Station. Note that Microsoft Internet Explorer 10 is required by Collaboration Station and is installed with Collaboration Station on the Collaboration Station node.

Applications that cannot be accessed directly from Collaboration Station, can be accessed using the RDP application approach. For more information, see "Accessing applications on remote computers checklist".

Attention
Embedded charts on point detail displays cannot be accessed directly from Collaboration Station. These should be viewed in Control Builder using the RESS node RDP application approach.

Installing and removing Collaboration Station

Related topics

Installing Collaboration Station

Collaboration Station software must be installed on each Collaboration Station node and the supporting infrastructure must be installed on the eServer.

The operating system and drivers on the Collaboration Station node should be set up in the same way as an Experion PKS Flex Station. For information about configuring the operating system using the Experion PKS System Initialization media, see the "Installing/Configuring operating system on Honeywell-qualified Dell platforms using Experion PKS System Initialization media" section in the *Software Installation User's Guide*. Consider the following points when using the Experion PKS System Initialization media to set up a Collaboration Station node:

- On the **Platform Configuration** page, clear the **Product Installation** check box.
- On the **Network and Input/Output Device Information** dialog box, **Network Type** must be set to Ethernet with one adapter.
- On the **Network and Input/Output Device Information** dialog box, **Touchscreen Type** must be left as None as the touchscreen driver must be installed manually.

To use third party applications, such as Microsoft Office or Microsoft Lync, from Collaboration Station, the appropriate software must be installed on the Collaboration Station node. For example, Microsoft Word must be installed on the Collaboration Station node to open a Microsoft Word document from Collaboration Station. A third party application can also be run on a remote computer from Collaboration Station. For more information, see "Accessing applications on a remote computer checklist."

To install Collaboration Station on an eServer or on a Collaboration Station node, follow the instructions in the *Software Installation User's Guide*.

The following prerequisites are required for the installation of Collaboration Station:

- A touch screen that complies with the Collaboration Station specification document.
- You have installed the touchscreen driver on the Collaboration Station node computer.
- If you intend to use Microsoft Office from Collaboration Station, you have installed it on the Collaboration Station node. For information about how to correct issues that may arise from installing Microsoft Office after Collaboration Station, see "A blank Microsoft Office window opens in addition to the requested content."
- The Collaboration Station installation media.
- The Collaboration Station system number and authorization key.
- You have access to the eServer system that Collaboration Station will be connecting to. For more information, refer to "eServer" in the *Server and Client Planning Guide*.
- You have established a work environment on the Collaboration Station node computer to use during the installation and configuration of Collaboration Station. This may involve connecting to the Collaboration Station node using remote desktop or using a different screen and attaching a keyboard and mouse.

Removing Collaboration Station

To remove Collaboration Station from an eServer or node

1   Choose **Start** > **Control Panel**.

2   In large or small icon view, choose **Programs and Features**.

3   From the **Uninstall or change a program** list, tap **Collaboration Station**.

4   At the top of the list, tap **Uninstall/Change**.

5   Follow the instructions to complete the removal process.

Configuring Collaboration Station

After Collaboration Station is installed on Collaboration Station nodes, it must be configured.

To configure Collaboration Station, you must create a workspace and configure Collaboration Station to use it. Users of Collaboration Station must also be configured.

A workspace consists of a background that is overlaid with radial menus and zoom regions. HMIWeb Display Builder is used to create a workspace and add the background, radial menus and zoom regions to the workspace. Collaboration Station is used to add contacts and other content to radial menus.

The workspace background should represent the facility. As well as static images, the background can contain dynamic content such as Experion trends, alphanumerics, alarm icons, and solution pack shapes.

Radial menus on a workspace must be configured to include the required content. The content can include Experion displays, contact lists for remote collaboration, webpages, remote applications, and documents.

Related topics

"Configuring users of Collaboration Station" on page 20
"Configuring a workspace" on page 21
"Accessing applications on remote computers checklist" on page 25
"Configure an RDP file for Collaboration Station" on page 26
"Collaboration Station design" on page 11

Configuring users of Collaboration Station

Configuring a user of Collaboration Station requires adding an Experion user to the eServer and configuring the user on the Collaboration Station node.

To add Collaboration Station users to the eServer

- On the eServer computer, add the Windows based operator account that will be used to access Collaboration Station. For more information, see "Adding an operator account" in the "Configuring System Security" section of the *Server and Client Configuration Guide*.

  It is recommended that this operator is configured as a ViewOnly user in Experion.

To configure a user on the Collaboration Station node

1 On the Collaboration Station node, add the user to one of the standard Experion local Windows groups such as Local Operators.

2 Log on to the Collaboration Station node using the new user account.

   To allow user configuration to be done, Collaboration Station will not start automatically the first time a new user logs on.

3 Choose an Aero theme in Windows. This can be done by right clicking on the Windows Desktop and selecting **Personalize**.

> **Attention**
>
> Choosing a non-Aero theme or clearing the **Use visual style on windows and buttons** check box on the **Visual Effects** tab of the **Performance Options** item in **Control Panel** may cause performance issues.

4 Open Internet Explorer and select **Use recommended security and compatibility settings** if prompted by an Internet Explorer setup dialog box.

5 Log off from Collaboration Station.

   The next time the new user logs on, Collaboration Station will start automatically.

Configuring a workspace

The configuration of a Collaboration Station workspace is done in two parts. The layout of the workspace must be configured using HMIWeb Display Builder on a Collaboration Station node and the content of the radial menus must be configured using Collaboration Station.

Task	Go to
In HMIWeb Display Builder, create or modify a workspace using the Collaboration Station Workspace template.	"To create a new workspace display"
In HMIWeb Display Builder, add any additional content that is required to form part of the workspace. This may include images and dynamic content such as alphanumerics, trends, alarm icons, and solution pack shapes.	*HMIWeb Display Builder Guide*
In HMIWeb Display Builder, add zoom regions to the workspace.	"To add a zoom region"
In HMIWeb Display Builder, add radial menus to the workspace.	"To add a radial menu"
On each Collaboration Station node, configure Collaboration Station to use the workspace. This step must be completed before you can configure the radial menus.	"Setting the Collaboration Station workspace" on page 35
On each Collaboration Station node, configure the radial menu content.	"Configuring a radial menu" on page 22

> **Attention**
> The following tasks are completed using an enhanced version of HMIWeb Display Builder that is installed with Collaboration Station. You cannot configure a workspace on a computer that does not have Collaboration Station installed.

Prerequisites

- You have identified the images to be used in the background and within radial menus.
- You have identified any dynamic content to be embedded in the background, such as trends, alarm icons, and solution pack shapes.
- You have established a work environment on the Collaboration Station node computer to use during the installation and configuration of Collaboration Station. This may involve connecting to the Collaboration Station node using remote desktop or using a different screen and attaching a keyboard and mouse.

To create a new workspace display

1 On the Collaboration Station node, choose **Start > All Programs > Honeywell Experion PKS > Client Software > HMIWeb Display Builder**.

2 On the **File** menu, click **New** and choose **Display from Template**.

3 Select **Collaboration Station Workspace**.

4 Click **OK**.
   A new display, based on the Collaboration Station Workspace template, appears.

5 In the HMIWeb Display Builder properties grid, set the workspace properties:

> **Tip**
> For the correct operation of Collaboration Station, it is recommended that the workspace background image has an aspect ratio of 16:9 and that the pixel resolution is the same as the resolution of the Collaboration Station computer screen. For example, 1920 x 1080.

   a Use the **Image** property to assign a an image file to be shown as the background.

   b Use the **Size** properties to assign a pixel height and width to the workspace.
   It is recommended that the workspace is the same size as the background image.

6   Add objects to the workspace display as required.

7   Save the workspace display.

The default folder for Collaboration Station workspaces is `<data folder>\Honeywell\Experion PKS\client\Abstract`. Where `<data folder>` is the location where Experion data is stored. For default installations, `<data folder>` is C:\ProgramData. The C:\ProgramData folder is a system folder, which means that it is only visible if you select the **Show hidden files, folders, and drives** option button in the **Folder Options** dialog box. To change this setting in Windows Explorer, click **Organize > Folder and search** options, and then select the **View** tab.

To add a zoom region

1   In HMIWeb Display Builder, create or open a workspace.

2   On the **View** menu, click **Shape Gallery**.

The Shape Gallery appears.

3   In the Shape Gallery Navigation Pane, browse to and click **Collaboration Station**.

The objects available to add to a workspace are displayed.

4   Drag `zoom_region` to the required location on the workspace.

5   In HMIWeb Display Builder, resize the rectangle as required.

> **Tip**
>
> It is recommended that you make the zoom region no larger than 200 x 110 pixels so that Experion displays opened after zooming in to the region will be automatically unsubscribed from Experion process data after zooming out.

To add a radial menu

1   In HMIWeb Display Builder, create or open a workspace.

2   On the **View** menu, click **Shape Gallery**.

The Shape Gallery appears.

3   In the Shape Gallery Navigation Pane, browse to and click **Collaboration Station**.

The objects available to add to a workspace are displayed.

4   Drag `radial_menu` to the required location on the workspace.

5   In the HMIWeb Display Builder properties grid, set the radial menu properties:

    a   Use the **AssetName** custom property to assign a name to be displayed on the radial menu. If the name is an Experion asset or point, the radial menu will display alarms associated with the asset or point. The same asset or point can be associated with more than one radial menu. All radial menus on workspaces on the same Collaboration Station node that are associated with the same asset or point, share the same content. For example, they all contain the same contacts, Experion displays, and documents. Radial menu content is not shared by different Collaboration Station nodes.

    b   Use the **AssetIcon** custom property to associate the radial menu with an image file to be shown on the radial menu. The standard radial menu images can be found on the Collaboration Station computer in `c:\Program Files (x86)\Honeywell\Experion PKS\client\Station\HMIWebJS\CollaborationStation\images\RadialMenu\StandardAssetIcons`.

Configuring a radial menu

Radial menus are configured within Collaboration Station after being placed on a workspace using HMIWeb Display Builder.

A radial menu can be configured to include the following types of content:

- Microsoft Lync contacts.
- Experion displays.

- Webpages.
- Files such as Word documents, Excel workbooks, and PDFs. For more information about supported content, refer to the "Software compatibility" topic.
- Local applications. The radial menu item can point to an application executable file. Refer to the Collaboration Station specification document for detailed information about compatibility with applications. Note that 64 bit local applications are not supported. Application software must be installed before it can be used from Collaboration Station.
- Remote applications. The radial menu item can point to an RDP file.

Attention
When deciding where to save files that are created for Collaboration Station (for example, shortcuts), consider that the dialog box to open a file will always open to the last file path. It may be useful to keep these files in one location to minimize navigation to locate the required files.

To edit the contents of a radial menu

1 Tap the workspace toolbar ⬢ at the bottom of the screen.

2 Tap **Edit Menus**.

3 Add, remove, or edit the contents of each menu segment as required.
Refer to the following tasks for details.

Changes will be saved as they are made.

4 Select **Exit Edit Menus** from the workspace toolbar.
This will remove all edit options from radial menus.

To add a new contact

1 Tap the 👤 (**Contacts**) category.

2 Tap the **Add Contact** option.
A Microsoft Lync search box will be displayed.

3 Enter all or part of the name of the contact you would like to add, in the format "last name, first name".

4 Locate the contact and tap **Add** to the right of the contact.
The contact will be added to the list of contacts for the radial menu.

To add a new Experion display

1 Tap the 📇 (**Displays**) category.

2 Tap the **Add Display** option.

3 Select the appropriate folder from the list of Station display paths.

4 Select the Station display name and tap **OK**.
The display will be added to the list of displays for the radial menu.

Tip
To access Experion custom displays on Collaboration Station, they should be securely copied from the eServer to the `<data folder>\Honeywell\Experion PKS\Client\Abstract` folder on the Collaboration Station node, where `<data folder>` is the location where Experion data is stored. For default installations, `<data folder>` is `C:\ProgramData`.

To add a webpage

1 Tap the 📑 (**Other content**) category.

2 Tap the **Add URL** option.

3 Enter the URL.

4 Enter the website name as you would like it to appear in the radial menu.

5 Tap **OK**.
The URL will be added to the list of content for the radial menu.

To add other radial menu content

1 Tap the 🗐 (**Other content**) category.

2 Tap the **Add Document** option.

3 Browse to the folder that contains the file that you wish to add, tap on the file, and then tap **Open**.
The file name will be added to the list of content for the radial menu.

To change the order of radial menu content

• Use the up and down arrows.

To remove an item from a radial menu

• Tap the **X** to the right of the item name.

Accessing applications on remote computers checklist

Microsoft Remote Desktop Protocol (RDP) files can be used from Collaboration Station to run applications on remote computers. You can use this method to access Experion configuration tools, or any other level 2 application, from Collaboration Station by configuring an RDP file on a Remote Engineering and Station Server.

Prerequisites

- A list of the applications.

Task	Go to	Done?
On the remote computer, install the Remote Desktop (RD) Session Host role service.	*http://technet.microsoft.com/en-us/library/cc742813.aspx*	
Add the required programs to the RemoteApp Programs list on the RD Session Host computer.	*http://technet.microsoft.com/en-us/library/cc753610.aspx*	
Create an unsigned Remote Desktop Protocol (RDP) file for each program in the RemoteApps Programs list. **Attention** The RDP files must be unsigned.	*http://technet.microsoft.com/en-us/library/cc731192.aspx*	
Copy the RDP files to a location that is accessible from the Collaboration Station node.		
To avoid being prompted for credentials when using the applications, you can allow default credential usage on Remote Desktop Connection (RDC) client single sign-on for Remote Desktop Services.	*http://technet.microsoft.com/en-us/library/cc772108(v=ws.10).aspx*	
Configure the settings of each RDP file.	"Configure an RDP file for Collaboration Station" on page 26	
Add the RDP file to a radial menu.	"Configuring a radial menu" on page 22	

Configure an RDP file for Collaboration Station

This topic describes how to modify a Remote Desktop Protocol (RDP) file to allow it to be used by Collaboration Station.

Prerequisites

• You have created an unsigned Remote Desktop Protocol (RDP) file for a program in the RemoteApps Programs list on the Remote Desktop (RD) Session Host computer.

• You have copied the RDP file to a location accessible from the Collaboration Station node.

• A mouse to use with the Collaboration Station node.

To configure an RDP file for Collaboration Station

1   On the Collaboration Station node, open the RDP file in a text editor such as notepad.

2   Change the value of the setting *remoteapplicationmode:i:* from **1** to **0**.

3   Change the value of the setting *span monitors:i:* from **1** to **0**.

4   Save the changes and exit notepad.

5   Right-click on the RDP file and select **edit**.

6   Select the **Display** tab and drag the **display configuration** slider to the left until it is a suitable size e.g. 800x600. Note It is important that display configuration is not set in the rightmost full screen setting.

7   Select the **General** tab and save the changes to the RDP file.

Operating Collaboration Station

The following topics describe how to use Collaboration Station.

The touchscreen gestures that can be used within Collaboration Station are described in "How to interact with Collaboration Station."

A Collaboration Station workspace can include a range of features including zoom regions, radial menus, pinned or floating content, and interactive content. The topic "Accessing Collaboration Station content" describes these features and how they are used to navigate within Collaboration Station.

Related topics

Starting Collaboration Station

The credentials that are used to log in will determine what information can be shown in any Experion displays within Collaboration Station. Access will work in the same way as within Station except that all Experion displays are read-only within Collaboration Station.

Prerequisites

- The Collaboration Station user has been configured. For more information, see "Configuring users of Collaboration Station".

To start Collaboration Station

1 Start the Collaboration Station computer.

2 Log on to Windows using the appropriate credentials.
Collaboration Station uses single signon, so the Windows credentials will be used to authenticate the user in Experion PKS.

3 Collaboration Station will start automatically.

How to interact with Collaboration Station

Collaboration Station is primarily intended to be used with a touchscreen. This topic describes the touchscreen gestures that can be used, and each gesture's purpose in Collaboration Station.

A mouse and an external keyboard (as distinct from the on-screen keyboard that can be displayed when required) can optionally be used with Collaboration Station. All navigation can be performed using a mouse instead of touch gestures:

- A tap action is achieved by moving the mouse pointer to the appropriate location and clicking.
- Panning is achieved by clicking on the workspace and moving the mouse while holding down the left mouse button.
- Zooming is achieved using the mouse's scroll bar or by clicking on zoom regions.
- Content can be moved by clicking and dragging.

Touchscreen gestures

Collaboration Station supports the following gestures.

Gesture	Description	Purpose in Collaboration Station
Pan	To pan, place one or two fingers on the screen and slide them across the screen. The object under your fingers will move with your fingers. Ensure that you do not place your fingers on a control such as a radial menu; panning is only available on the workspace or within applications (such as Station or Microsoft Word).	In Collaboration Station, panning is used to move a workspace that cannot all be seen on screen at one time. The panning gesture is also used to move content windows.
Zoom	To zoom, place two fingers on the screen. Slide them apart to zoom in or slide them together to zoom out.	Zoom gestures are used to zoom in and out of a region or workspace, or to make content larger or smaller.
Tap	To tap, touch the screen briefly with one or two fingers.	In Collaboration Station, tapping is used to: • Zoom a content window so that it takes up most of the screen. • Open a radial menu and select an item. • Move in and out of a zoom region.

Accessing Collaboration Station content

This topic describes the features of Collaboration Station and the available methods of navigating the Collaboration Station workspace and accessing content.

Figure 2: Features of Collaboration Station

1. Workspace

A workspace represents the facility. It consists of static images, zoom regions, radial menus, dynamic content such as Experion trends, alphanumerics, alarm icons, and solution pack shapes.

You can interact with the workspace in the following ways:

• Zoom in and out

• Pan across the workspace (if the whole workspace is not visible on the screen at once)

• Tap the background while you are viewing a zoom region, to zoom back out to the workspace

2. Zoom region

Zoom regions are designed to make it easier to navigate to predefined regions within the workspace. They are rectangular and are bordered by a dotted line.

When you tap on a zoom region it will be moved to the centre of the screen and zoomed so that the whole zoom region is displayed in as large a size as possible.

When zoomed, if you tap on the background outside a zoom region, the workspace will zoom out. If you tap on another zoom region, the workspace will center and zoom into that zoom region.

You can also navigate within zoom regions as you would elsewhere in Collaboration Station, using panning and zooming gestures.

3. Radial menu

Additional content can be accessed via radial menus. These menus are placed wherever appropriate to give access to relevant content.

A radial menu will progress through three states as you interact with it:

- When a menu is closed it will be visible as a small circular image. Note that the images that are displayed may vary as they will be configured for your facility.

- When the menu icon is tapped the radial menu will be enlarged to show the following categories:

  - ⬛ Experion displays
  - 👤 Contacts
  - 📖 Other content

- When a category is tapped, the available items will be listed. In the example shown, the 👤 icon has been tapped and a list is displayed of the personnel who have been configured as potential remote collaborators for that location or asset.

A radial menu may be associated with an asset. If this is the case, an alarm icon representing the highest priority unacknowledged alarm will replace the menu icon if the asset has any alarms.

Tip

- To close a radial menu, tap in the centre. If the menu is left open it will be closed automatically when another radial menu is tapped.

- If you zoom into a region before opening content windows from a radial menu, the zoom region can be used as a placeholder for the content windows when you zoom out. Pinned content windows will be made small when you zoom out and enlarged to their original size when you return to the zoom region. This usage of zoom regions keeps your workspace organized and automatically unsubscribes Experion displays from Experion process data when their content windows become small after zooming out.

---

4. Content window

Content that is accessed via a radial menu will be opened in a new window. Each window is an instance of the application that is required to open the selected content, such as Experion displays, Microsoft Lync, Microsoft Word, Adobe Acrobat, Microsoft Excel, and Internet Explorer.

Application windows are stripped of their normal title bar and controls. These are replaced with touch-sized controls that appear along the top of the window:

- 📌 and 📍 make the content window float or to pin it to the background.

  While a window is floating, it will not move with the background when the background is panned or zoomed. If you navigate away from that area of the background, the content window will not move off the screen, and if you zoom the background, the content window will not become larger or smaller. If the window is pinned to the background, it will move and zoom with the background. When a window is pinned, it can also be resized and moved independently of the background.

  When 📌 is displayed, the window is currently pinned to the background. Tap 📌 to make the content window float.

  When 📍 is displayed, the window is currently floating. Tap 📍 to pin the window to the background.

- ✏️ and 🔄 move the window in and out of interactive mode.

  Interactions with the application, such as entering text or scrolling, are only possible in interactive mode.

  When ✏️ is displayed, the window is not in interactive mode. Tap ✏️ to enter interactive mode.

  When 🔄 is displayed, the window is currently in interactive mode. Tap 🔄 to leave interactive mode.

- ✖️ closes the window.

By default, most content windows are pinned but not interactive. Microsoft Lync windows are interactive by default.

You can interact with content windows in the following ways:

- Tap anywhere within the content window to zoom in so that the window takes up most of the screen. This function is not available when the window is in interactive mode.

- Move content windows using a pan gesture to drag them to the required location. This function is not available when the window is in interactive mode.

- Use the application as normal (for example, to enter text or refresh a webpage). This is only possible in interactive mode.

5. Workspace toolbar

The workspace toolbar provides access to the following features:

- Add content: the **Open Display**, **Call**, **Open Document** and **Open Webpage** options allow you to open content that is not accessible via a radial menu. The content will be available for the current session only.

- Edit mode: the **Edit Menus** option allows radial menu content to be configured. Changes will be saved so that the content can be accessed in future sessions. For more information, refer to "Configuring a radial menu".

- Configuration settings: the **Settings** option allows you to set which workspace will be displayed when Collaboration Station is opened.

- **Close All Windows**: closes all open content windows.

- **Keyboard**: opens an on screen keyboard.

- **Help**: opens the Collaboration Station Getting Started video help.

- **Exit**: closes Collaboration Station.

Remote collaboration using Microsoft Lync

Microsoft Lync (Lync) can be used from Collaboration Station to interact with remote contacts.

Lync can be used for voice and video calls, Lync Meetings, identifying presence, and instant messaging. Once you have started a conversation with a contact, you can use the other features available on the Lync conversation window. For example, to start a conference call, make a call to the first contact and then use the options in the Lync conversation window to invite other contacts to join the conversation.

> **Attention**
>
> To move a Lync conversation or meeting window on the workspace, you must drag the window by the video or conversation section of the window.
>
> A contact's presence status is identified by the colored bar next to a contact's name. You can use presence status to determine whether another contact is available for a conversation. Green presence status, for example, indicates that a contact is Available for a conversation, whereas red presence status indicates that the contact is Busy and might not want to be interrupted. For more information about the Lync presence status colors, see the documentation for Lync.

Prerequisites

- If you want to use Lync for video or voice communication, the supporting hardware must be available. For example, a camera, microphone and speakers.
- The Lync client has been installed and configured on the Collaboration Station computer.
- Lync is running on the Collaboration Station computer.
- The Collaboration Station operator is signed in to Lync.

To call a contact using a radial menu

1 Identify the location or asset that the contact is associated with.

2 On the workspace, tap the radial menu shown near the location or asset.
   The radial menu will be enlarged.

3 Tap the 👤 **Contacts** category.
   The contacts available on this radial menu will be displayed.

4 Tap the appropriate contact.
   A Lync conversation window will open. If the contact's computer has a microphone and a camera installed, Lync will initiate a video call. Otherwise, a voice call will be initiated. You can use the options available in the Lync conversation window to switch between video and voice.

To call a contact using the workspace toolbar

1 Tap the workspace toolbar 🔘 at the bottom of the screen.

2 Tap **Caller List**.
   A Lync search box will be displayed.

3 In the Search box, type the contact's name, phone number, or skill.
   As you type, the search results will adjust to display the most likely contacts.

4 Tap **Call** to the right of the appropriate contact.
   A Lync conversation window will open. If the contact's computer has a microphone and a camera connected to it, Lync will initiate a video call. Otherwise, a voice call will be initiated. You can use the options available in the Lync conversation window to switch between video and voice.

To make a conference call

1 Call a contact from a radial menu or from the workspace toolbar.
   A Lync conversation window will open.

2   In the Lync conversation window, tap **People Options**.

3   Tap **Invite by Name or Phone Number**, and then enter a name or phone number to select contacts to join the conversation.

To answer a call or participate in a meeting

•   When someone calls you or invites you to join a meeting, tap the Lync notification when it appears. A Lync conversation window will open.

To share your workstation

1   Make or answer a call to open a Lync conversation or meeting window.

2   In the Lync conversation or meeting window, tap the **Share** menu and then tap **Desktop**.

Setting the Collaboration Station workspace

When Collaboration Station starts, it will display the workspace that it has been configured to use. To display a different workspace you must change this setting within Collaboration Station and then exit and reopen Collaboration Station.

To set the workspace

1 Tap the workspace toolbar ![icon] at the bottom of the screen.

2 Tap **Settings**.

3 Tap the "..." icon to the right of the **Workspace filename** field.

4 Browse to the folder that contains the HTM file that you wish to use as the default workspace, tap the file, and then tap **Open**.

   The HTM file must be on the local computer.

Closing Collaboration Station

To close Collaboration Station

1   Tap the workspace toolbar at the bottom of the screen.

2   Tap **Exit**.

   If any open files have unsaved changes you will be prompted to save before closing.

Troubleshooting for Collaboration Station

A blank Microsoft Office window opens in addition to the requested content

When you call up a Microsoft Office window, a blank content window is opened in addition to the requested content window.

Cause

Microsoft Office was installed after Collaboration Station was installed and registry entries required for Office documents to open correctly from Collaboration Station have been overwritten.

Solution

1   Navigate to the station installation directory.

2   Double-click the OpenOfficeDocumentsInBrowser registry file.
    This requires administrator privileges.

3   Exit and restart Collaboration Station.

An application does not open in Collaboration Station

When you call up an application from the workspace toolbar or a radial menu, the application does not open.

Diagnostic check

Are you being prompted to save or download the application file?

Cause

The third party software, for example Microsoft Office, is not installed on the appropriate computer.

Solution

Install the required software. If you are running the application on a remote computer, the remote computer must have the appropriate software installed.

Cannot change the workspace or radial menu content

Changing Collaboration Station to use a different workspace has no effect and you cannot change radial menu content.

Diagnostic check

1 Tap the workspace toolbar at the bottom of the screen.
2 Tap **Settings**.
3 Tap the "..." icon to the right of the **Workspace filename** field.
4 Browse to the folder that contains the HTM file that you wish to use as the default workspace, tap the file, and then tap **Open**.
   The HTM file must be on the local computer.

After you exit and reopen Collaboration Station, is the old workspace still displayed?

Cause

The Windows user account is not a member of one of the standard Experion local Windows groups on the Collaboration Station node.

Solution

On the Collaboration Station node, add the user to one of the standard Experion local Windows groups such as Local Operators. For more information, see "Configuring users of Collaboration Station".

Cannot resize content window

You open an application on the workspace and cannot resize the content window.

Diagnostic check

When is displayed, the window is not in interactive mode. Is the content window not in interactive mode?

Cause

Content windows cannot be resized if they are not in interactive mode. You must enter interactive mode.

Solution

• Tap to enter interactive mode.

Diagnostic check

In the **Processes** tab of **Task Manager**, does the application have **32* as a suffix to the **Image Name**? 64 bit applications do not have this suffix.

Cause

You are running a 64 bit local application. Collaboration Station only supports 32 bit local applications.

Solution

Select the 32 bit version of the application to run from Collaboration Station.

Data and alarms are not displaying correctly

The data and alarms for an Experion display are not displaying correctly in Collaboration Station.

Diagnostic check

On the eServer, open an Experion display and the data and alarms are not displaying correctly.

Cause

The Distributed System Architecture (DSA) between the eServer and process servers is not enabled or has failed.

Solution

For more information, see the following topics:

- "Remote DSA server shows failed status" in the "Fixing common problems" section of the *Troubleshooting Guide*.
- "No alarms are seen under the Network tree on the System Status display" in the "Fixing common problems" section of the *Troubleshooting Guide*.

Gestures are not working correctly in Collaboration Station

Collaboration Station is not responding correctly to touchscreen gestures.

Diagnostic check

Using Device Manager, check whether the latest version of the touch screen driver is installed.

Cause

The latest version of the touch screen driver is not installed.

Solution

Download and install the latest version of the touch screen driver from the manufacturers web site.

Diagnostic check

Check whether the USB cable between the touch screen and the Collaboration Station computer is connected.

Cause

The USB cable that is used to convey gestures is not connected.

Solution

Connect the USB cable.

Gestures are not performing smoothly in Collaboration Station

Panning, zooming and moving of content windows in Collaboration Station is not smooth.

Diagnostic check

When panning or zooming the Collaboration Station workspace or moving content windows, does the screen update slowly?

Cause

The Collaboration Station workspace may be overloaded with too many regions, orbital menus, HMIWeb Display Builder elements, graphics, or open applications.

Solution

Refer to the Collaboration Station specification document and ensure your workspace is within stated limits.

Cause

Choosing a non-Aero theme or clearing the **Use visual style on windows and buttons** check box on the **Visual Effects** tab of the **Performance Options** item in **Control Panel** may cause performance issues.

Solution

Choose an Aero theme in Windows. This can be done by right clicking on the Windows desktop and selecting **Personalize**. For more information, see "Configuring users of Collaboration Station".

Prompted for Experion credentials

Your credentials are not recognized when you start Collaboration Station.

Diagnostic check

Check whether the Windows account you used to log on has been added as an Experion operator on the eServer.

Cause

The Windows account has not been configured as an Experion operator on the eServer.

Solution

Add the Windows account as an Experion operator and log in again. For more information, see "Adding an operator account" in the "Configuring System Security" section of the *Server and Client Configuration Guide*.

Diagnostic check

Check whether the system has been configured for single signon.

Cause

Your system has not been configured for single signon.

Solution

Configure your system to allow single signon. For more information, see "Configuring Integrated Security signon policy" in the "Configuring System Security" section of the *Server and Client Configuration Guide*.

The interactive and pinning buttons are missing

You open an application on the workspace and the interactive and pinning buttons are missing.

Diagnostic check

In the **Processes** tab of **Task Manager**, does the application have **32* as a suffix to the **Image Name**? 64 bit applications do not have this suffix.

Cause

You are running a 64 bit local application. Collaboration Station only supports 32 bit local applications.

Solution

Select the 32 bit version of the application to run from Collaboration Station.

The Lync conversation window does not open

When you make a call from the workspace, a Lync conversation window does not open.

Diagnostic check

Are the Contacts missing from the radial menus?

Cause

Microsoft Lync is not installed or it you are not signed in to Lync.

Solution

Install and sign in to Lync.

The workspace is not displaying

The Collaboration Station workspace is not displaying.

Diagnostic check

Did you receive an error saying that the workspace can't be accessed?

Cause

The Collaboration Station display file (workspace) is located on a network location that has caused the Collaboration Station node to enter protected mode and the workspace cannot be called up.

Solution

Move the Collaboration Station display to the local computer.

Notices

Trademarks

Experion®, PlantScape®, SafeBrowse®, TotalPlant®, and TDC 3000® are registered trademarks of Honeywell International, Inc.

OneWireless™ is a trademark of Honeywell International, Inc.

Other trademarks

Microsoft and SQL Server are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Trademarks that appear in this document are used only to the benefit of the trademark owner, with no intention of trademark infringement.

Third-party licenses

This product may contain or be derived from materials, including software, of third parties. The third party materials may be subject to licenses, notices, restrictions and obligations imposed by the licensor. The licenses, notices, restrictions and obligations, if any, may be found in the materials accompanying the product, in the documents or files accompanying such third party materials, in a file named third_party_licenses on the media containing the product, or at http://www.honeywell.com/ps/thirdpartylicenses.

Documentation feedback

You can find the most up-to-date documents on the Honeywell Process Solutions support website at:

http://www.honeywellprocess.com/support

If you have comments about Honeywell Process Solutions documentation, send your feedback to:

hpsdocs@honeywell.com

Use this email address to provide feedback, or to report errors and omissions in the documentation. For immediate help with a technical problem, contact your local Honeywell Process Solutions Customer Contact Center (CCC) or Honeywell Technical Assistance Center (TAC) listed in the "Support and other contacts" section of this document.

How to report a security vulnerability

For the purpose of submission, a security vulnerability is defined as a software defect or weakness that can be exploited to reduce the operational or security capabilities of the software.

Honeywell investigates all reports of security vulnerabilities affecting Honeywell products and services.

To report a potential security vulnerability against any Honeywell product, please follow the instructions at:

https://honeywell.com/pages/vulnerabilityreporting.aspx

Submit the requested information to Honeywell using one of the following methods:

- Send an email to security@honeywell.com.

  or

- Contact your local Honeywell Process Solutions Customer Contact Center (CCC) or Honeywell Technical Assistance Center (TAC) listed in the "Support and other contacts" section of this document.

Support

For support, contact your local Honeywell Process Solutions Customer Contact Center (CCC). To find your local CCC visit the website, https://www.honeywellprocess.com/en-US/contact-us/customer-support-contacts/Pages/default.aspx.

Training classes

Honeywell holds technical training classes on Experion PKS. These classes are taught by experts in the field of process control systems. For more information about these classes, contact your Honeywell representative, or see http://www.automationcollege.com.

NOTICES

Index