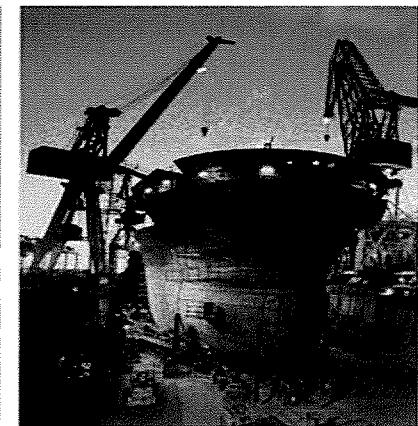
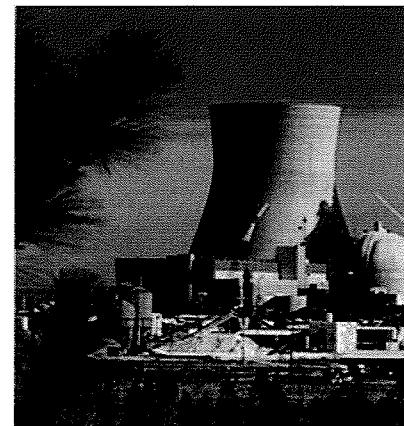
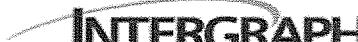

SmartPlant P&ID – Setup and Customization

Workshare and Projects Labs

Process, Power & Marine



INTERGRAPH

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Preface

This document is a course guide for the various SmartPlant Engineering Manager and P&ID User Guides. The content is the similar as the online Help delivered as part of the software with the exception of the Labs.

If You Need Assistance

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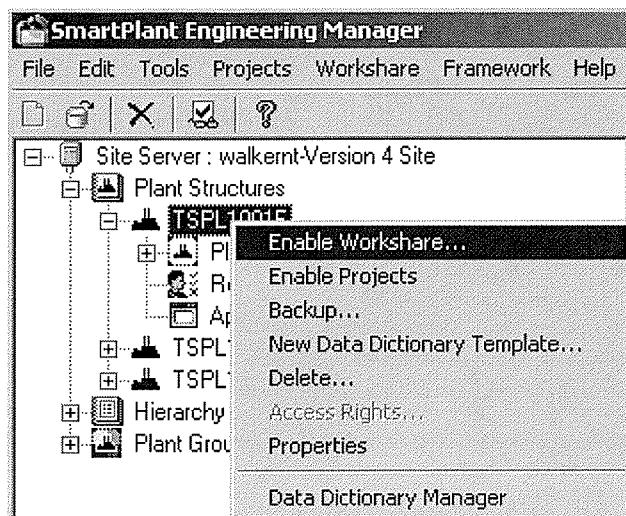
Lab 1 – Setting up Workshare

Purpose: Enabling plant structure for workshare and performing workshare collaboration at satellite site

Before you begin, exit all drawings you have open and exit SmartPlant.

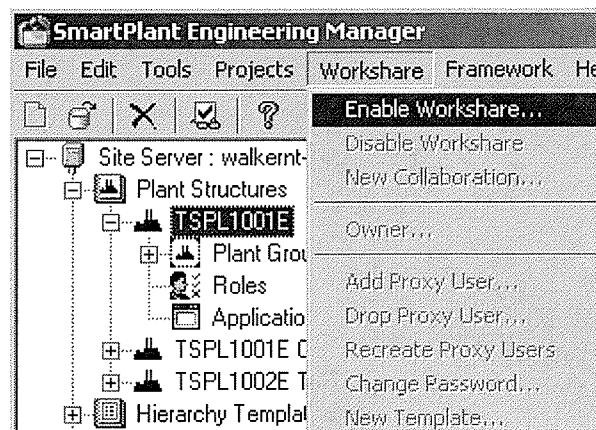
Enable Workshare

1. Start **Engineering Manager** and select a **Plant Structure**.
2. Right-click on the **Plant** and select **Enable Workshare**

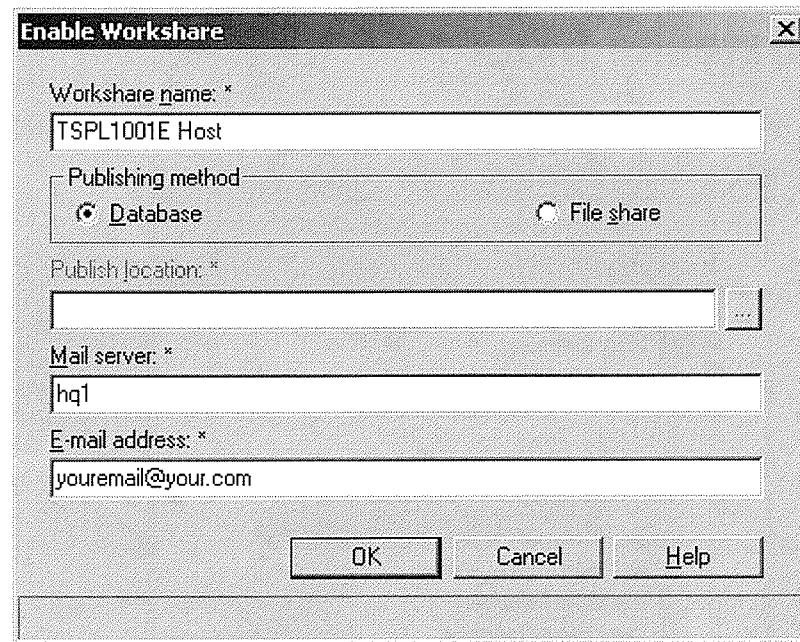


OR

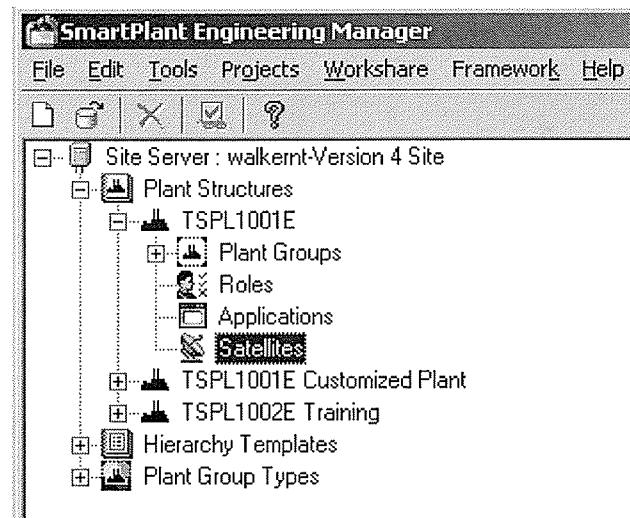
Select the **Plant** and right-click to select **Workshare > Enable Workshare**.



3. This will bring up the **Enable Workshare** dialog. Enter the following information and click **OK**.

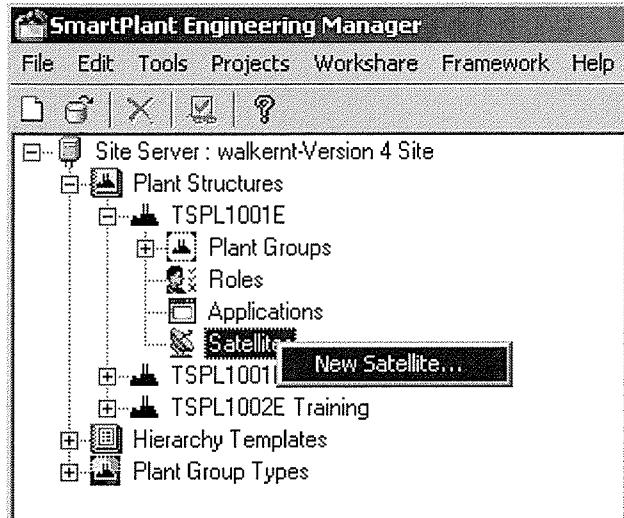


- When the process is complete, you will see that a **Satellites** node has been added to the **Plant in Engineering Manager**.

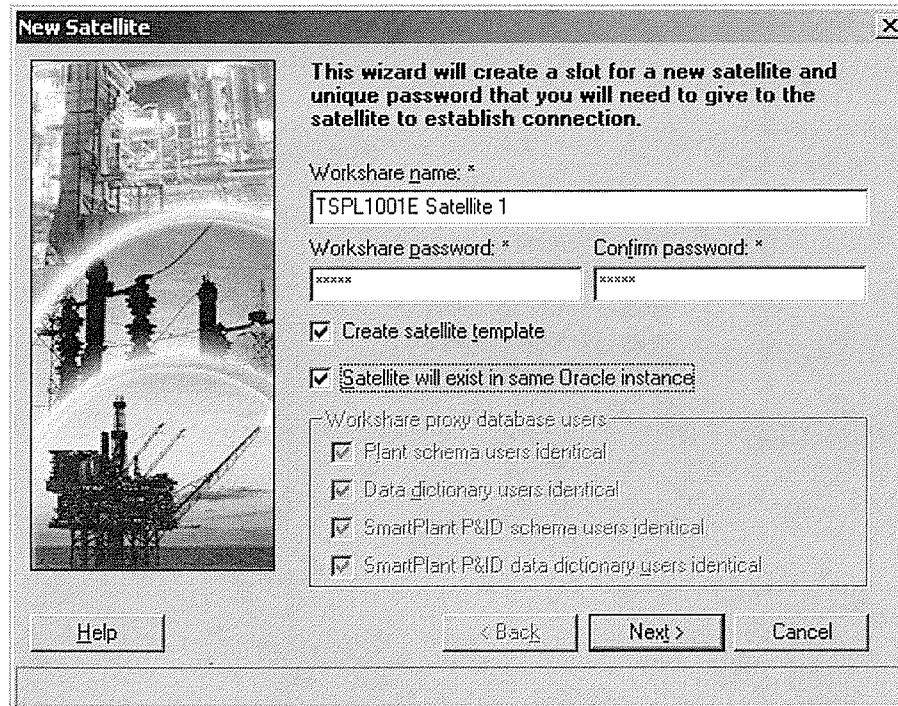


Create Satellite Slot

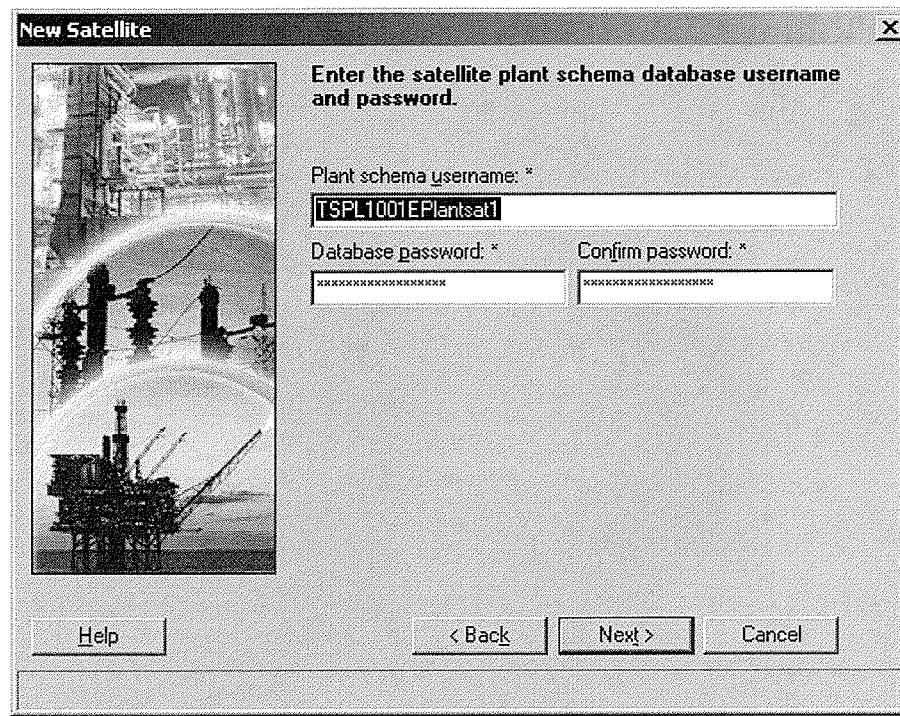
5. Right-click on the **Satellites** node, and select **New Satellite...**



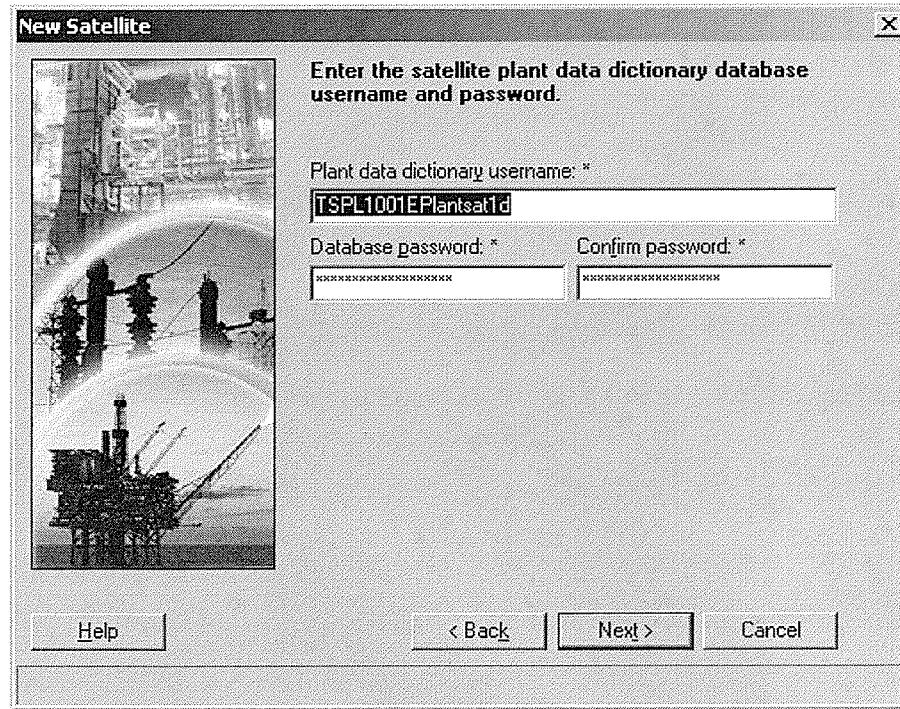
6. This will bring up the **New Satellite** wizard. Enter the following information (using **class** as the Workshare password) and then click **Next**.



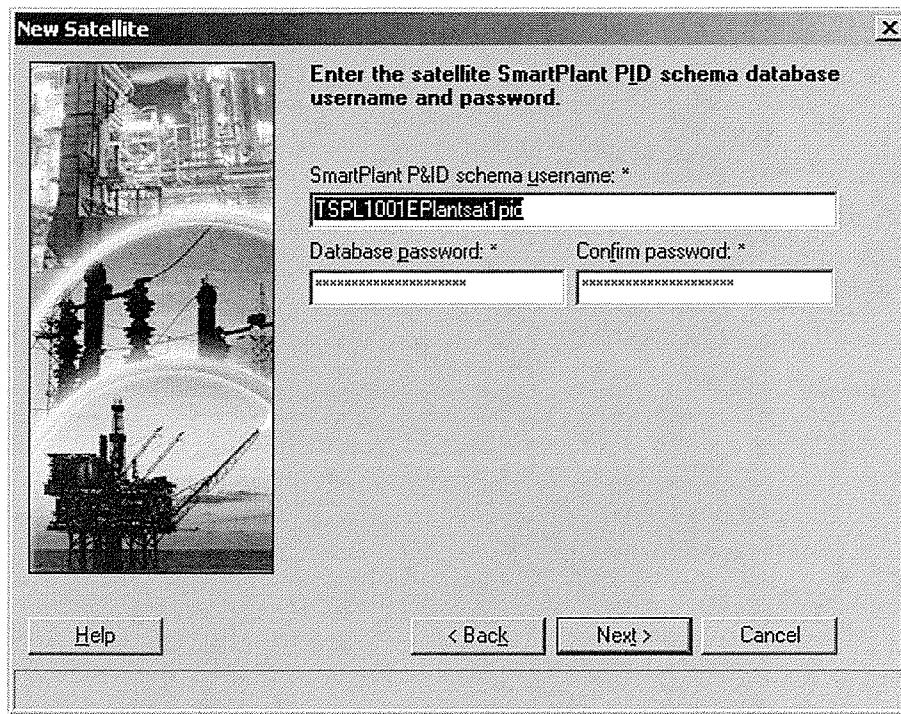
7. On the next dialog, accept the default Plant schema username and password (which will be the same as the username). Then, click **Next**.



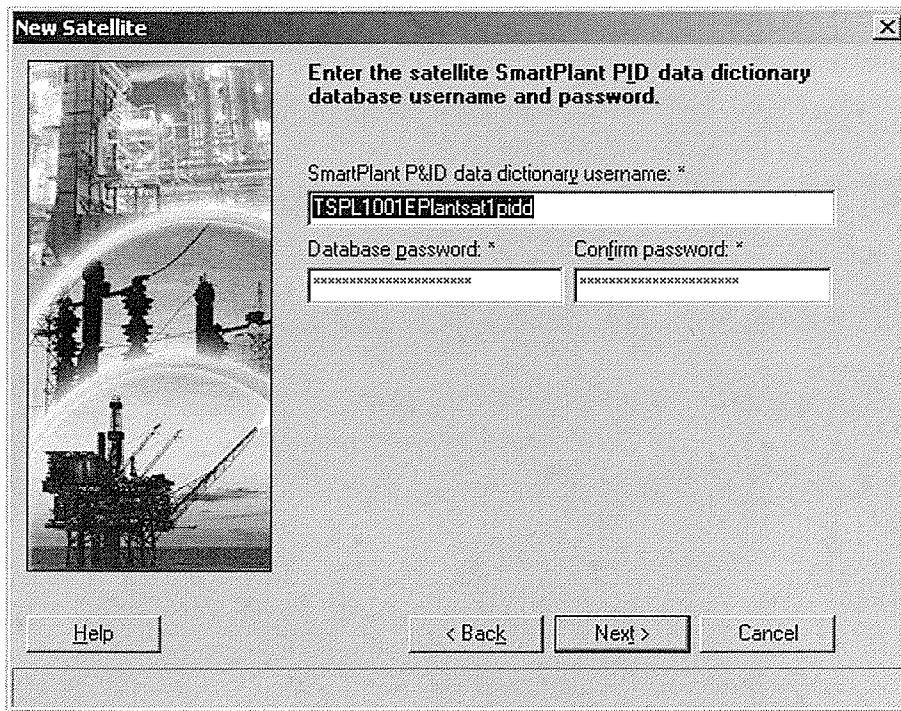
8. On the next dialog, accept the default Plant data dictionary schema username and password (which will be the same as the username). Then, click **Next**.



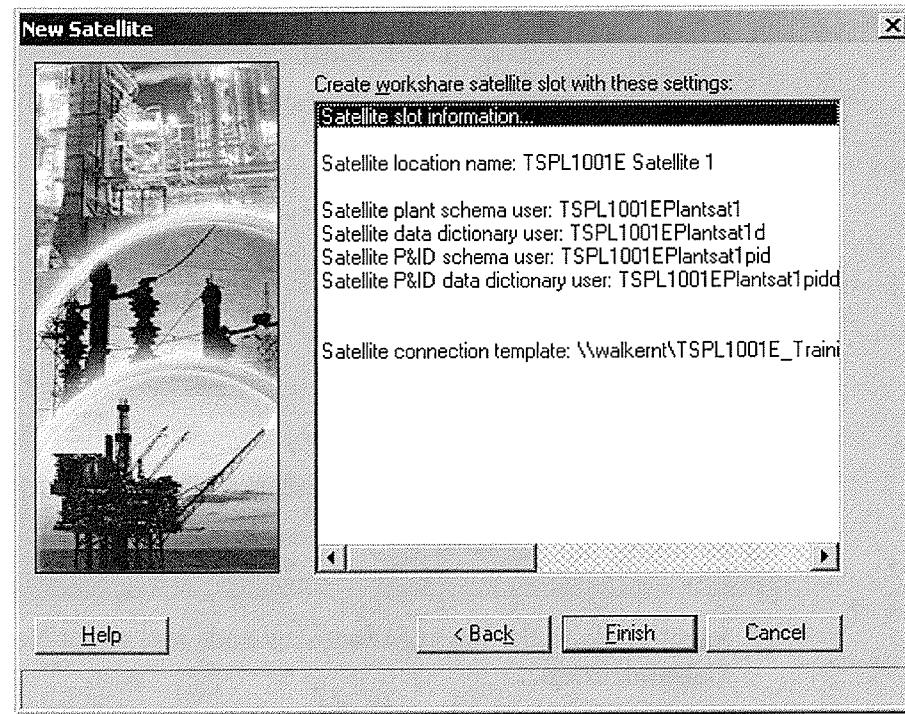
9. On the next dialog, accept the default SPPID schema username and password (which will be the same as the username). Then, click **Next**.



10. On the next dialog, accept the default SPPID data dictionary schema username and password (which will be the same as the username). Then, click **Next**.



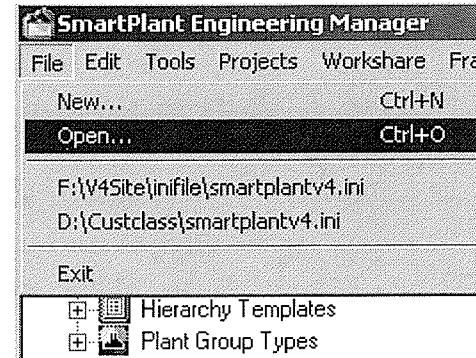
11. On the last dialog, review the information and then click **Finish**.



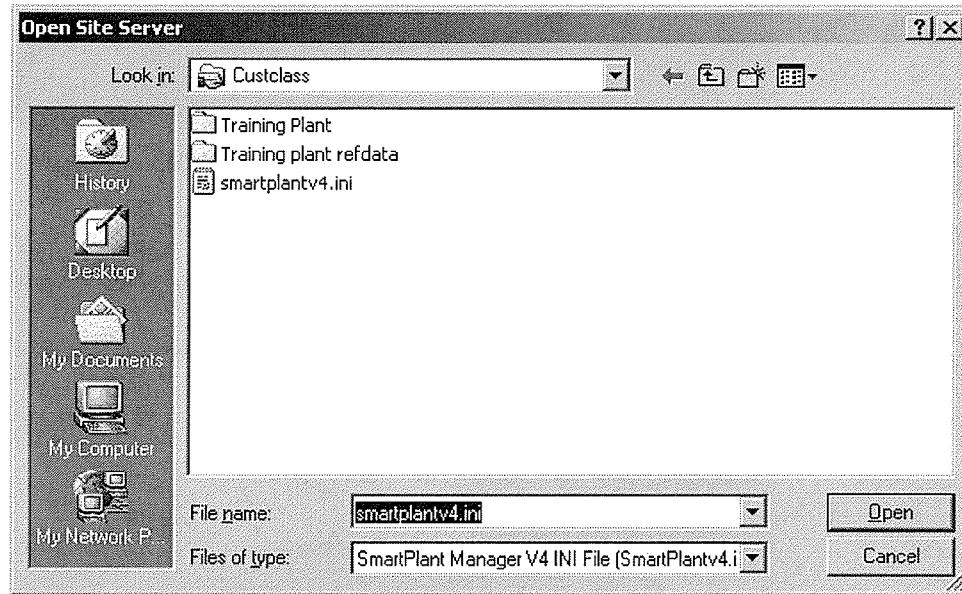
12. At the end of the process, verify that a new satellite creation template has been created in the Satellite Templates directory under the Plants share on your machine.

Perform workshare collaboration at satellite

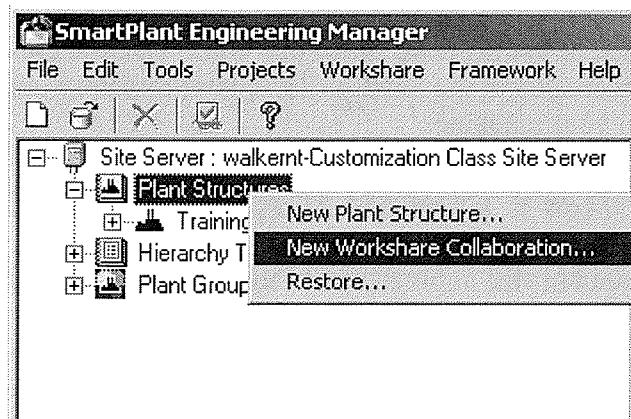
13. While you are still in SmartPlant Engineering Manager, click **File >Open**.



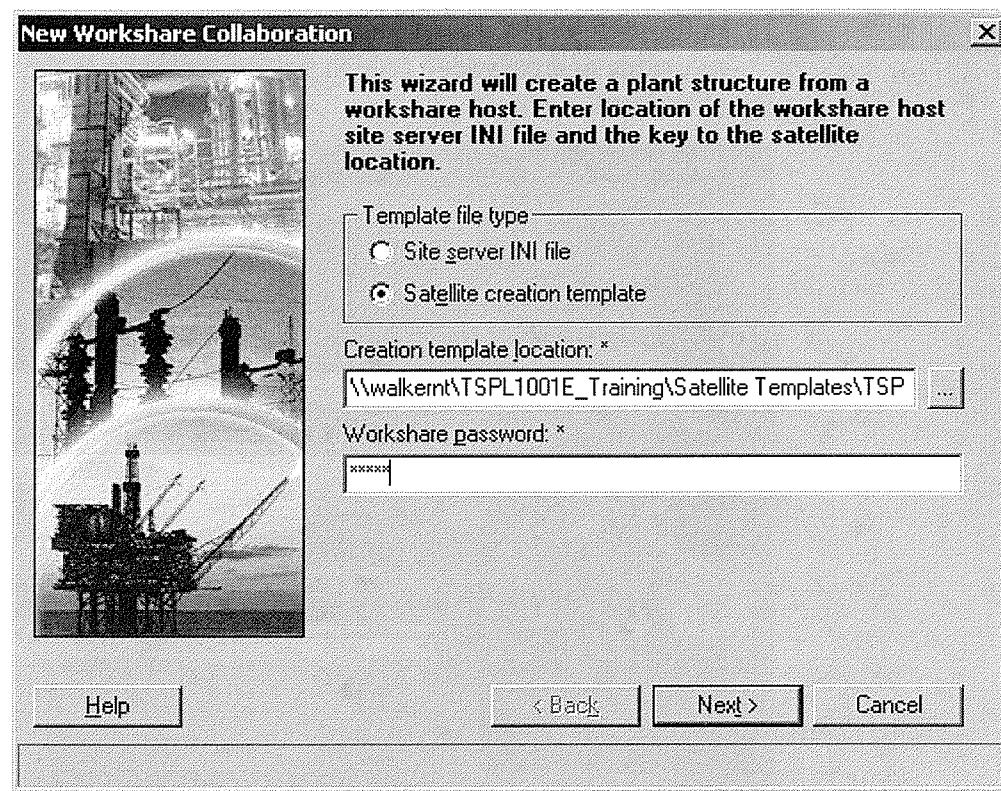
14. In the **Open Site Server** dialog box, browse to the smartplantv4.ini file located in the **Custclass** directory. Then click **Open**.



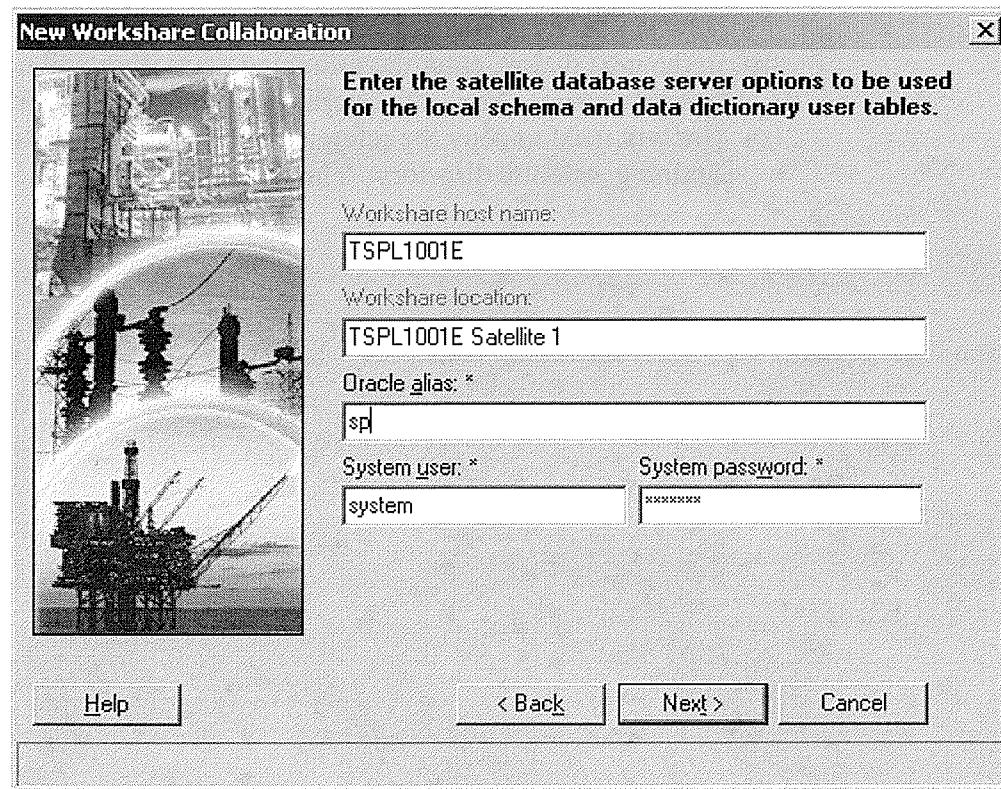
15. Right-click on the **Plant Structures** node and select **New Workshare Collaboration...**



16. This will bring up the **New Workshare Collaboration** wizard. Enter the following data (using **class** as the Workshare password) and click **Next**.



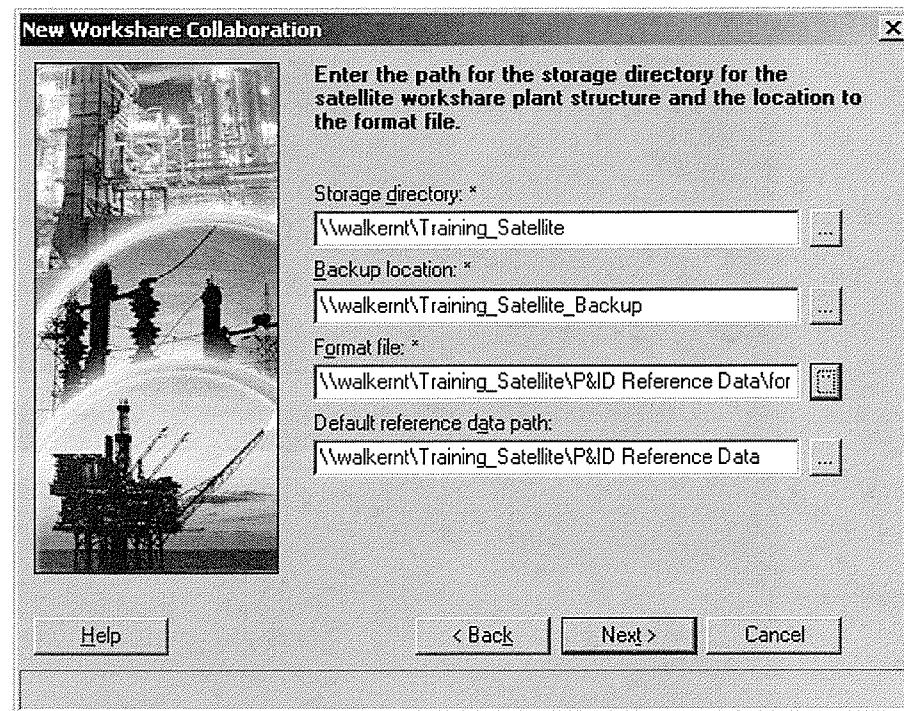
17. In the next dialog, enter the information about the Oracle alias and system user and password (manager) and click **Next**.



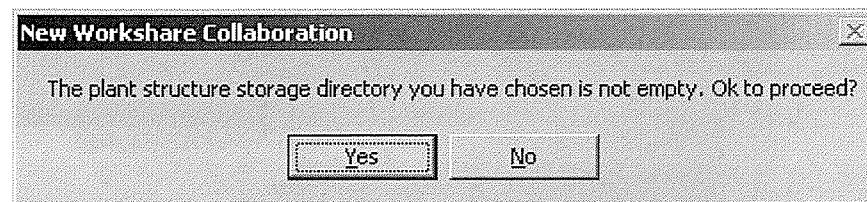
18. In the next dialog, accept the default Plant replication schema username and password (which will be the same as the username) and click **Next**.



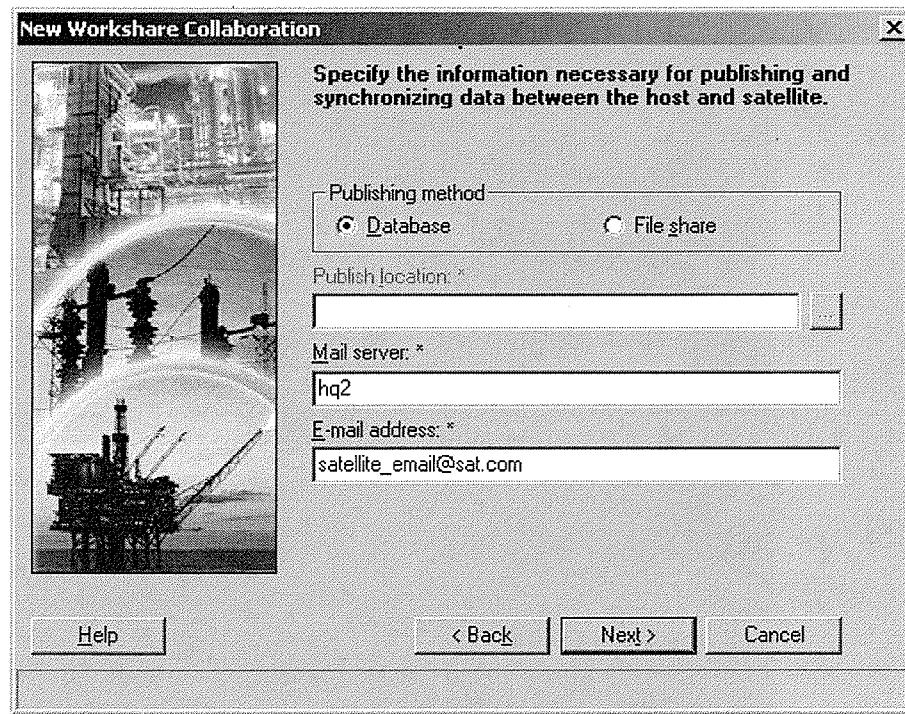
19. In the next dialog, enter the following data. You will need to create two new shares (Training_satellite and Training_satellite_backup) and you will need to copy the reference data from Host Plant to the Training_satellite directory. Then click **Next**.



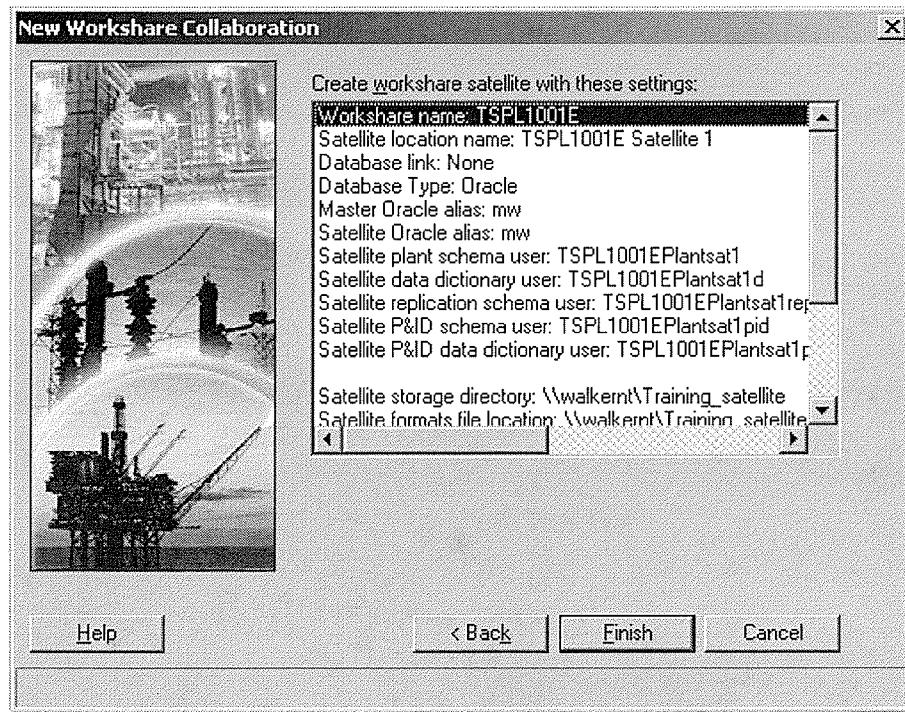
20. You will see the following message box. Click Yes.



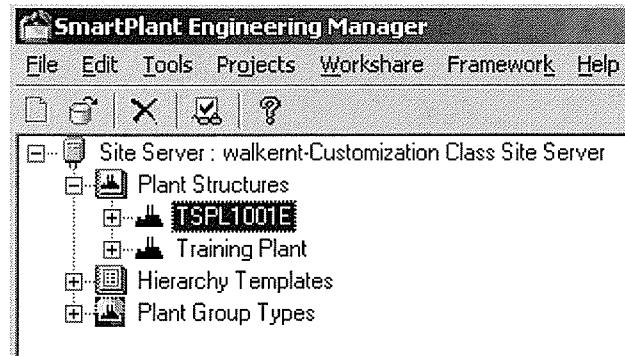
21. In the next dialog, enter the following information and click Next.



22. In the last dialog, review the information and click **Finish**.

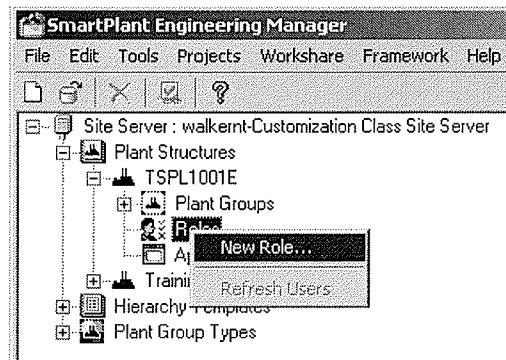


23. When the process has completed, you will see that TSPL1001E has been added to the **Plant Structures** node for this site.



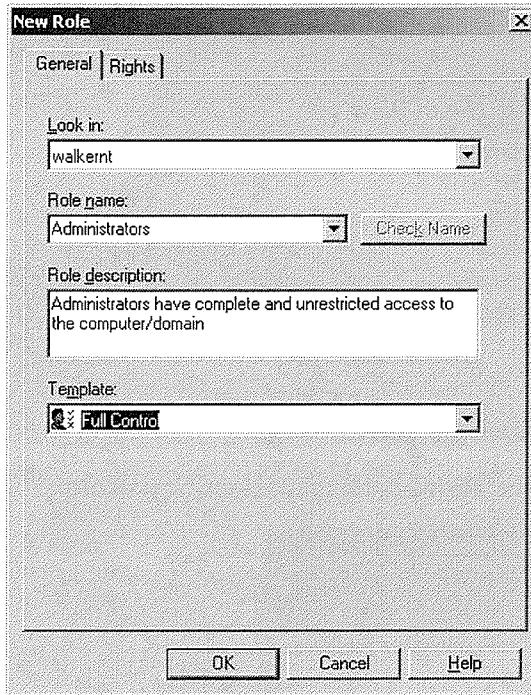
Add user access for the satellite plant

24. Right-click on the **Roles** node and select **New Role...**



25. On the **General** tab:

- Select the **Look-in** to your local machine
- Select **Role Name of Administrators**
- Select **Template of Full Control**.



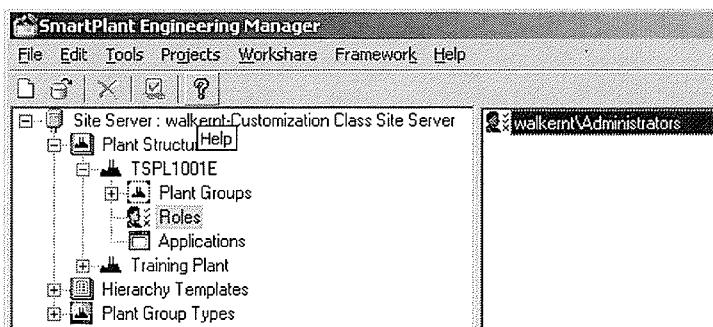
26. On the Rights tab, select the **SmartPlant P&ID** application. Note the categories where you have Read-only access rather than Full Control as the highest level of access.

You should have read-only access at the satellite for (Catalog, Plant Filters, Default Views, Plant Reports, Rules, Data Dictionary, Insulation Specifications)

What is the maximum level of user access you have for Options?

27. Click **OK**.

You will see the new role in **SmartPlant Engineering Manager**.



Modify Options Manager setting for Export to cad definition file

28. Open **Options Manager** and set a valid file location for the **Export to CAD Definition File**.

EquipNextSeqNo	131
Export to CAD Definition File	\walkernt\Training_Satellite\P&ID Reference Data\exportlayer.xls
Framework Resource Path	\walkernt\Training_Satellite\P&ID Reference Data\EFResources
InstrLoopNextSeqNo	100

29. Click **File >Save in Options Manager**.

30. Open **Options Manager** at the host (using **File > Open Database** and selecting the host **smartplantv4.ini** file).

31. Set a valid file location for the **Export to CAD Definition File**.

Export to CAD Definition File	\walkernt\TSPL1001E_Training\P&ID Reference Data\exportlayer.xls
Framework Resource Path	\walkernt\TSPL1001E_Training\P&ID Reference Data\EFResources
InstrLoopNextSeqNo	100

32. Click **File >Save in Options Manager**.

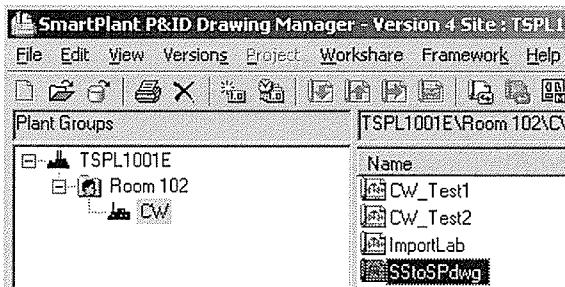
Lab 2 – Workshare: Publish/Subscribe

Purpose: Publishing Drawings at the Host Site to the Satellite Site for Read-Only.

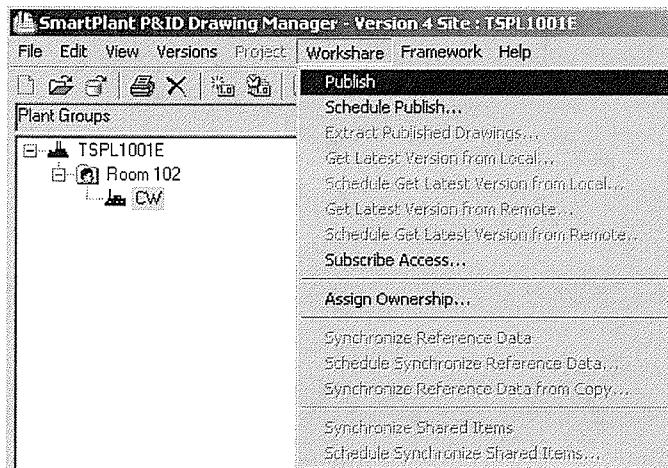
Before you begin, exit all drawings you have open and exit SmartPlant.

Publish a Drawing

1. Start Drawing Manager and select a drawing.

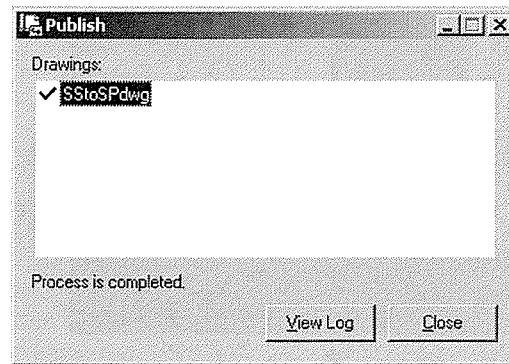


2. Select Workshare > Publish



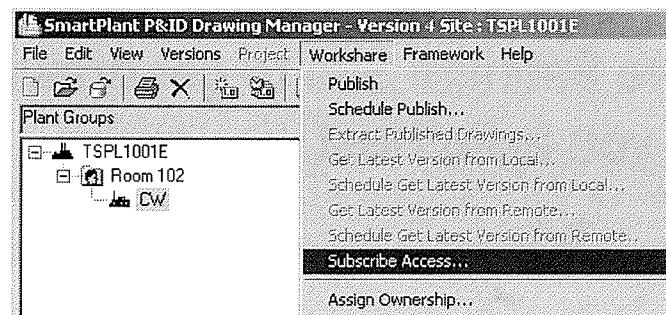
- Process will complete

- **View Log**
- **Select Close**

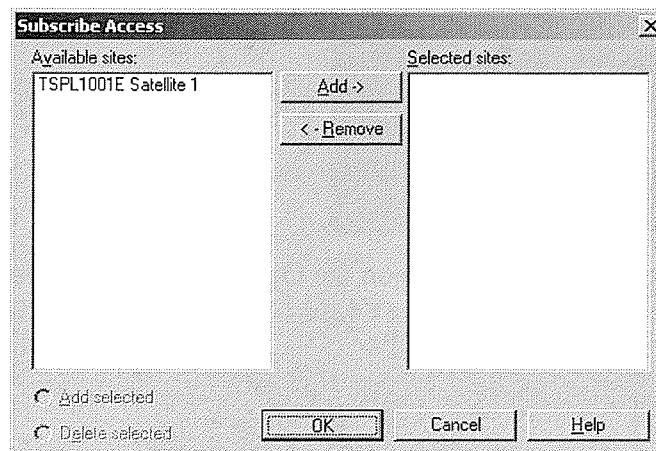


Give Subscription Access to a Satellite Site.

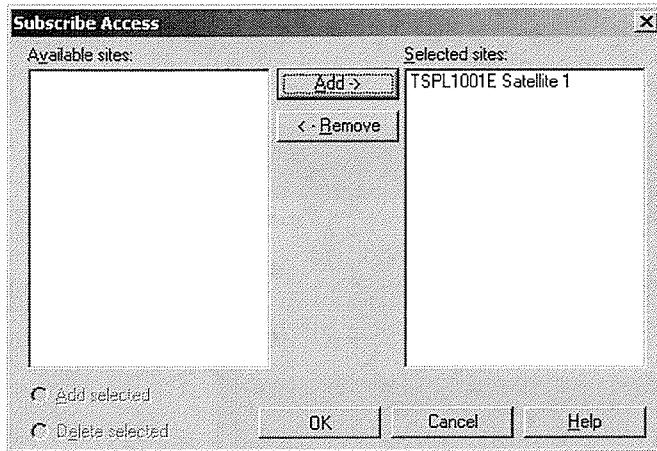
3. Select Workshare > Subscribe Access



4. Give Subscription Access to a particular Satellite Site.



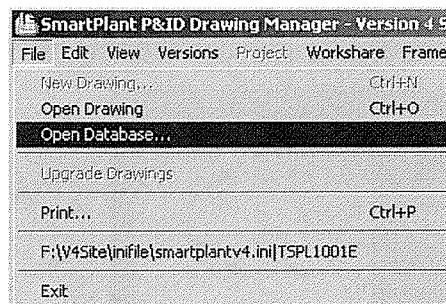
- **Select Satellite 1 from Available Sites**
- **Select Add**



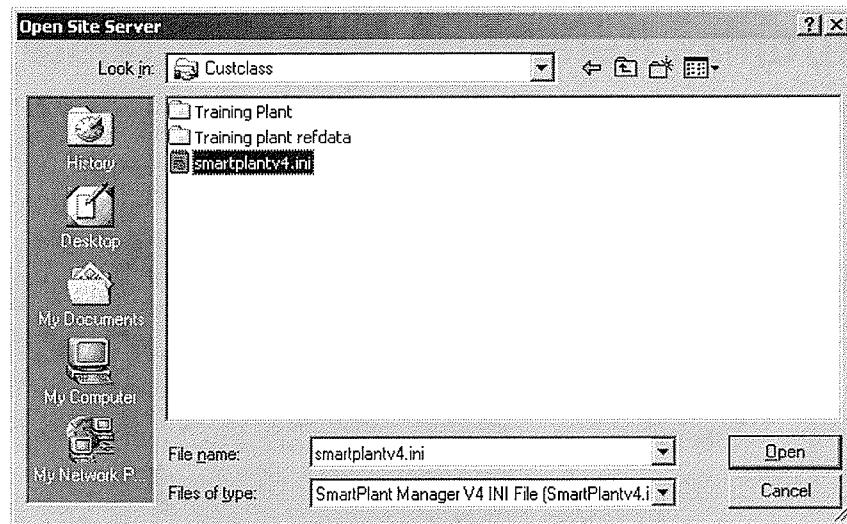
- Select **OK**
- Exit **Drawing Manager**
- Open **Drawing Manager**

Connect to the Satellite Site to get drawing published to you from Host.

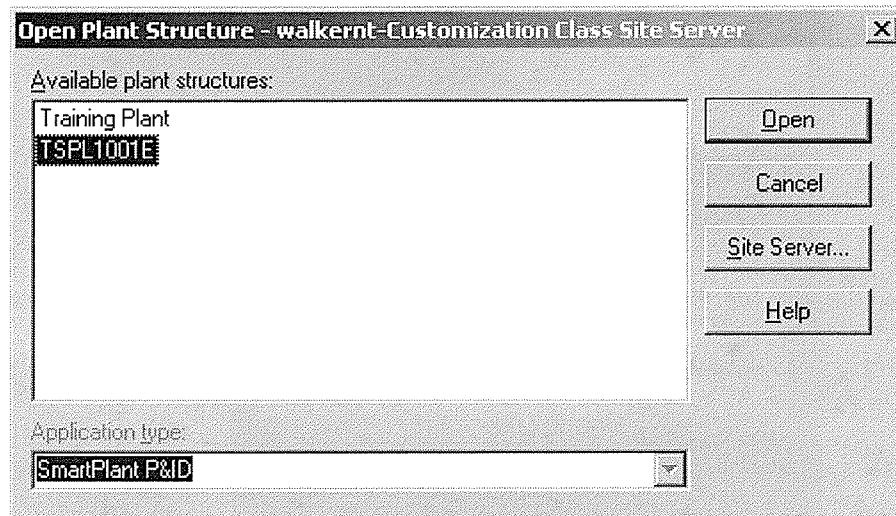
5. Set the Site to the **Satellite Site**
6. **File > Open Database**



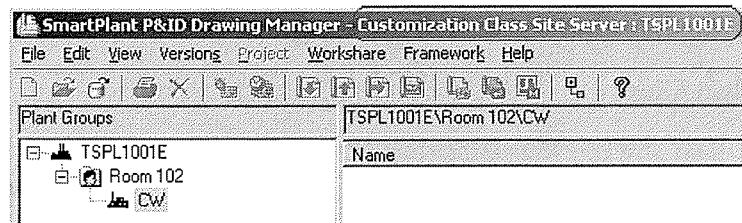
7. Select **Site Server** button on the **Open Plant Structure** dialog box and select the **SmartPlantV4.ini** file for the **Satellite Site** and select **Open**.



8. Select the **Plant Structure** and select **Open**.

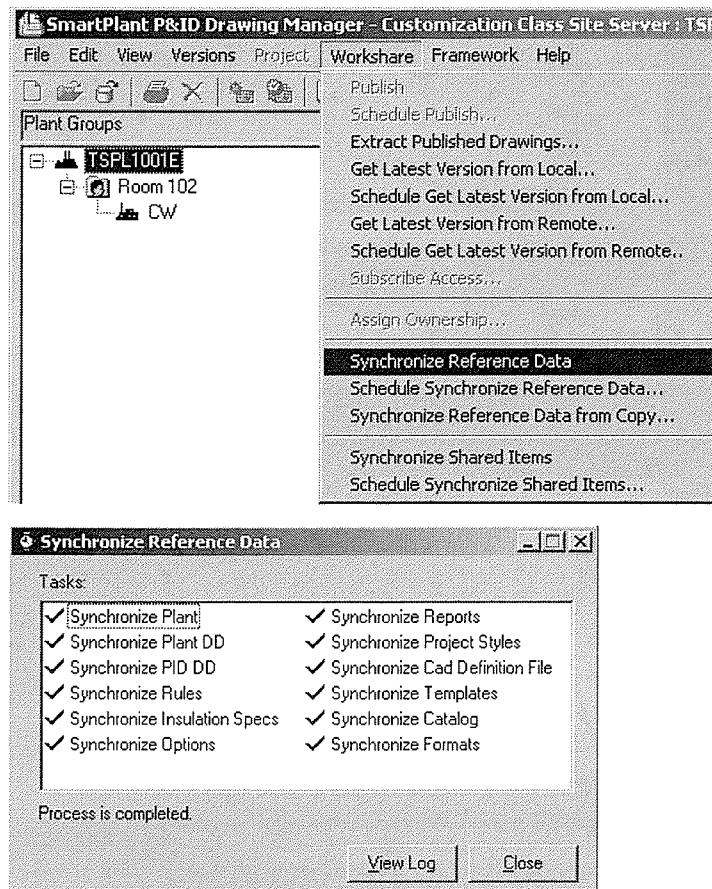


9. **Drawing Manager** should indicate you are connected to the **Satellite Site** vs. the **Host**.



Synchronize Reference Data at Satellite with Host

10. Select Workshare > Synchronize Reference Data



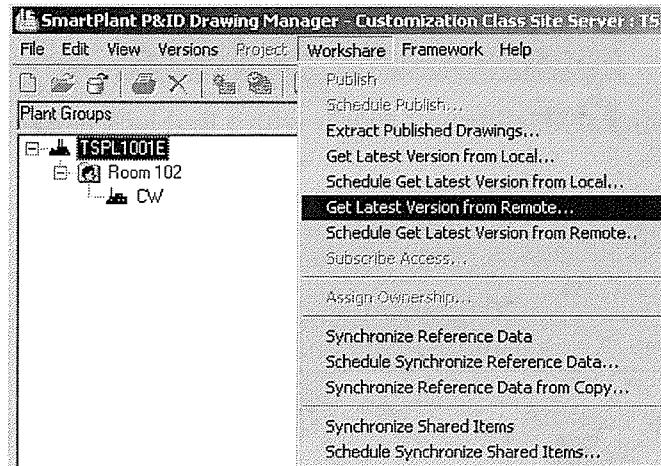
- **View Log File**
- Log file is located in ~:\Documents and Settings\<Your Login\Local Settings\Temp
- **Select Close**

11. Exit and re-enter Drawing Manager

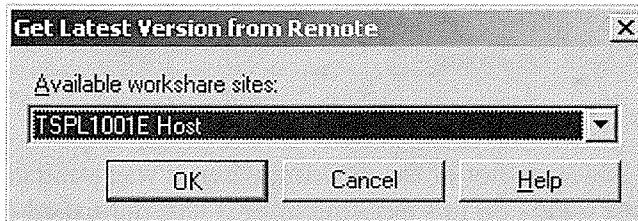
Get the Drawing from the Host that was published to the Satellite Site.

12. Select the **Plant**.

13. Select **Workshare > Get Latest Version from Remote¹**.



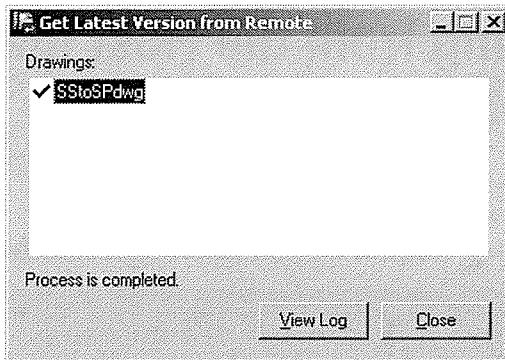
14. Select the **Site** to get the **Drawing** from.



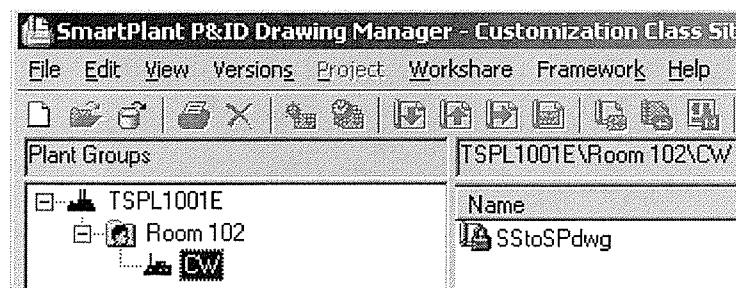
- Process will complete
- **View Log**

¹ When the network connection between the Host and Satellite Site is abnormal (db_link is down) the SPPID modeler sometimes will not be able to open the drawing even though this drawing belongs to this site.

The solution is when the dblink is down the Site owns is determined by what they owned at the time of the last Synchronize of Reference Data which happens to also copy the Plant Schema contents to the Satellite. We recommend that to avoid this situation that you always run Synchronize Reference Data after Getting Ownership of or creating new drawings.



15. Drawing at Satellite will appear with a Red lock to indicate Read-Only access.

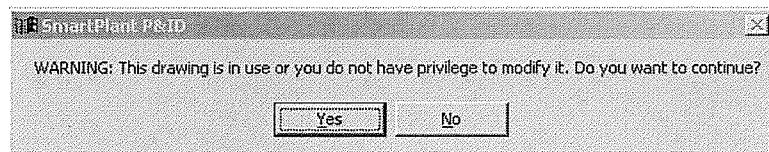


16. Open drawing at Satellite Site.

17. File > Open Drawing

18. The below message is indicating Read-Only access.

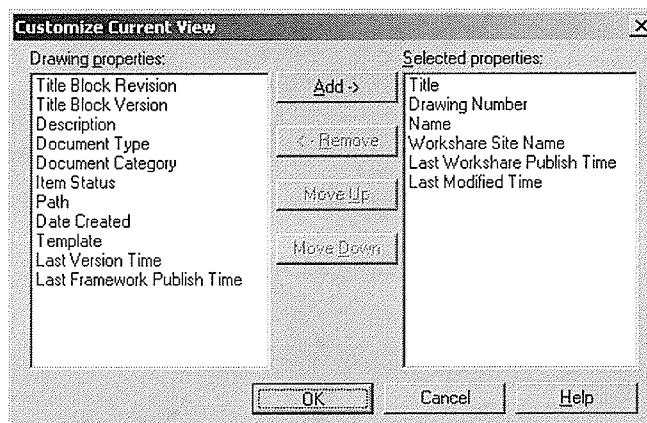
Notes: this is a snapshot of the drawing when it was published from the Host, if the Host works on this drawing after it was published to the Satellite the Host would need to re-publish the drawing to the Satellite and the Satellite would need to execute a Get Latest Version from Remote, in order for the Satellite to see the latest and greatest.



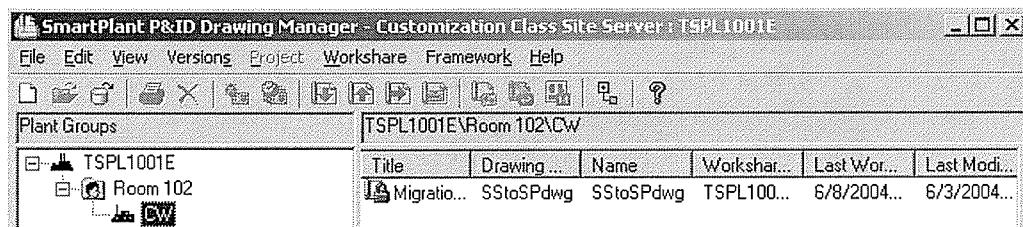
19. **File > Exit Drawing**

In Drawing Manager, Customize the Current View to include the Properties of Workshare Site Name, Last Publish Time and Last Modified Time.

20. Select **View > Customize Current View**.
21. Select the following Properties from the **Drawing Properties** list and **Add** to the **Selected Properties** list
 - Workshare Site Name
 - Last Publish Time
 - Last Modified Time
22. Select **OK**.



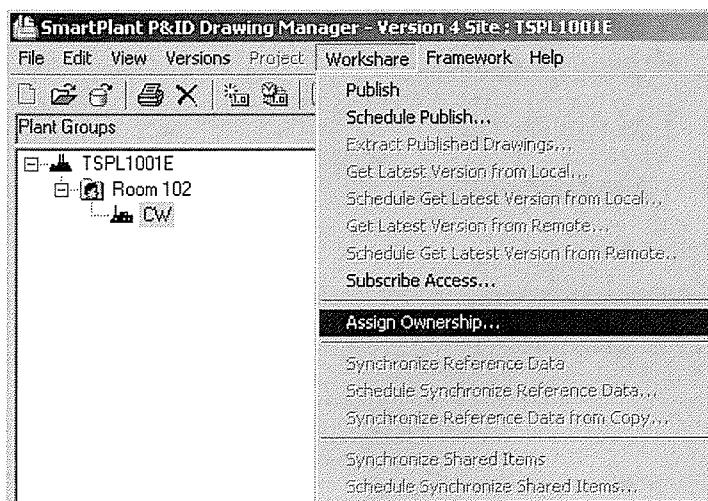
23. The **Drawing Manager** view should be similar to the below.



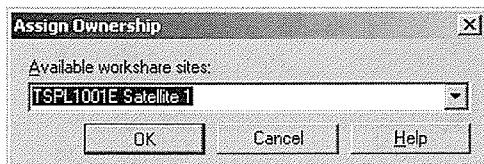
Lab 3 – Workshare: Assign Ownership

Purpose: Transferring Ownership of a Drawing from the Host to a Satellite Site

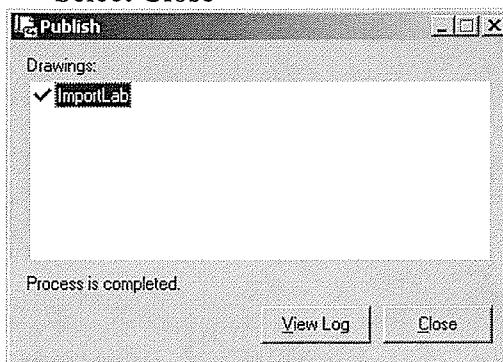
1. Start **Drawing Manager**
2. Verify you are at the **Host**, if not select **File > Open Database, Site Server**, select **Host INI** file, select **Plant Structure**, select **Open**
3. Select a drawing
4. Select **Workshare > Assign Ownership.**



5. Select site **Satellite 1** to **Assign Ownership**.



- Process will complete
- **View Log**
- **Select Close**



6. Exit Drawing Manager

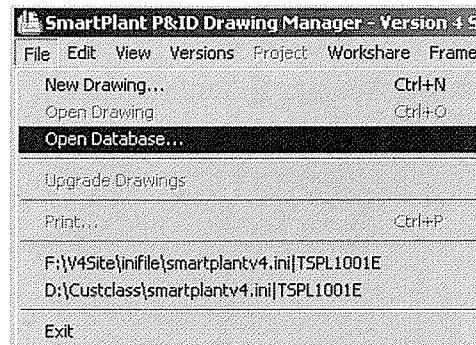
7. Open Drawing Manager

Connect to the Satellite Site to take ownership of drawings that were transferred from the Host.

 **Notes:** At this stage the Host can revoke Ownership if the Satellite has not taken ownership yet by Transferring Ownership back to itself.

8. Set the Site to the Satellite Site

9. File > Open Database

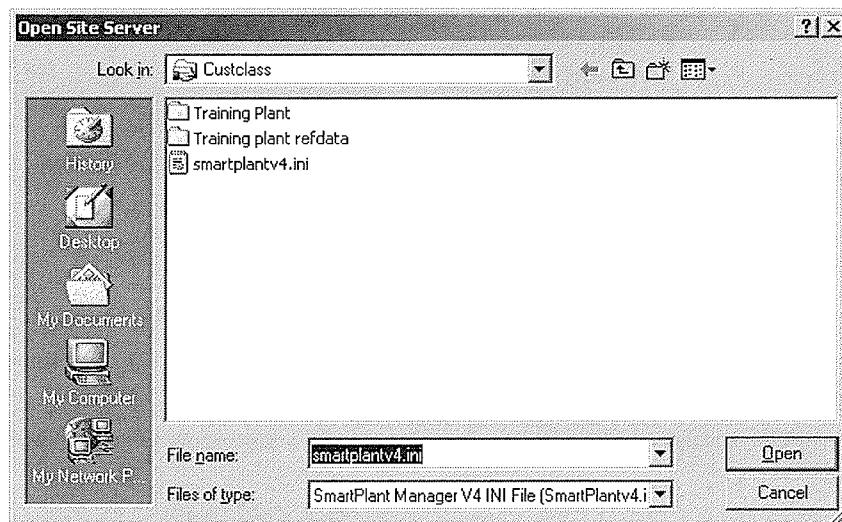


10. Select Site Server on the **Open Plant Structure** dialog box.

11. Point to the **SmartPlantV4.ini** file for the Satellite Site Server.

12. Select the **SmartPlantV4.ini** file.

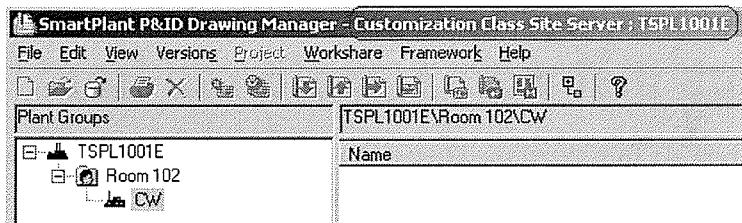
13. Select **Open**.



14. Select the **Plant** on the **Open Plant Structure** dialog box.

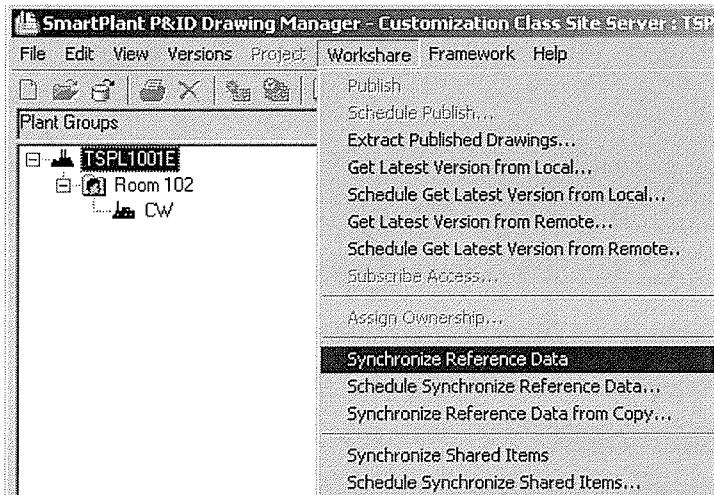
15. Select **Open**

16. **Drawing Manager** should indicate you are connected to the **Satellite Site vs. the Host**.



If required, Synchronize Reference Data at Satellite with Host

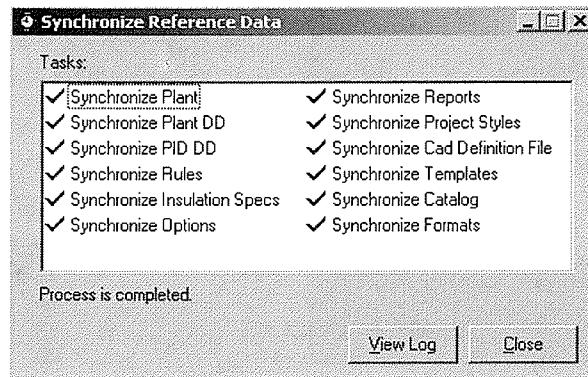
17. Select **Workshare > Synchronize Reference Data²**



- **View Log File**
- **Select Close**

² When the network connection between the Host and Satellite Site is abnormal (db_link is down) the SPPID modeler sometimes will not be able to open the drawing even though this drawing belongs to this site.

The solution is when the dblink is down the Site owns is determined by what they owned at the time of the last Synchronize of Reference Data which happens to also copy the Plant Schema contents to the Satellite. We recommend that to avoid this situation that you always run Synchronize Reference Data after Getting Ownership of or creating new drawings.

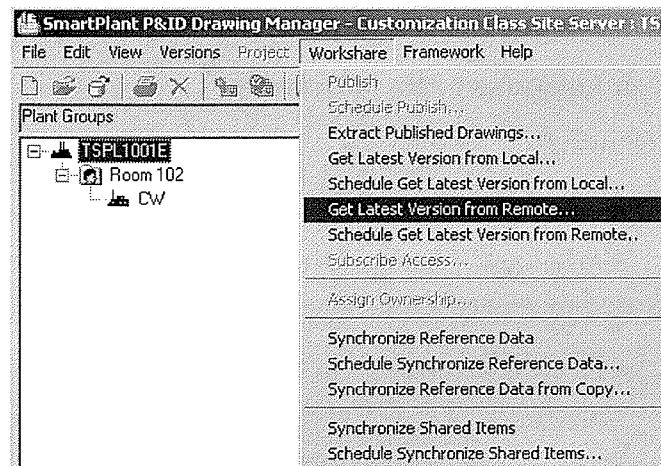


18. Exit and re-enter Drawing Manager.

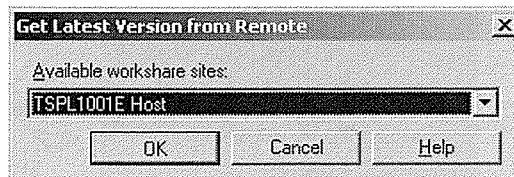
Taking ownership of drawings.

19. Select Plant

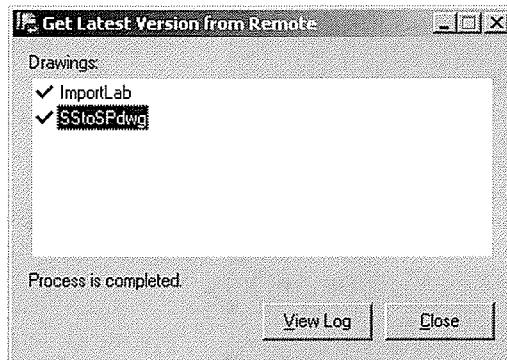
20. Select Workshare > Get Latest Version from Remote.



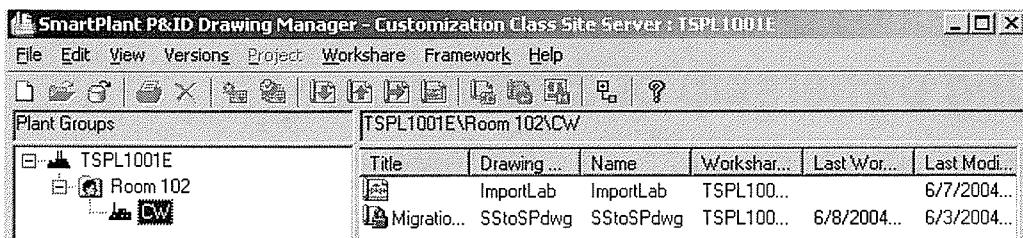
21. Select Site to get Drawing from.



- Process will complete
- View the Log.
- Select Close.



22. Drawing display at Satellite Site.



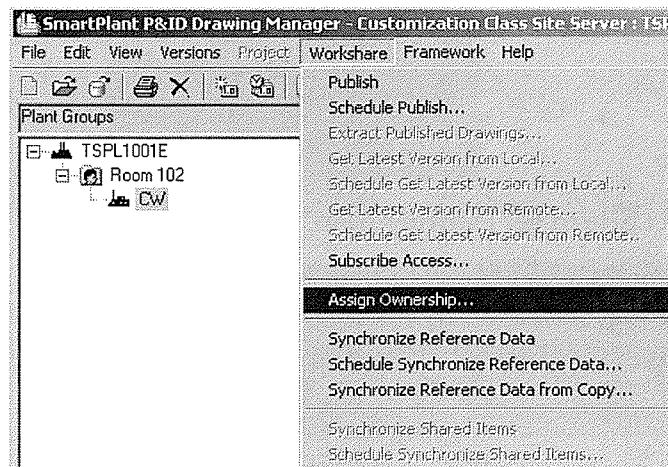
23. Open drawing at Satellite Site.

24. Place an Equipment item in Drawing.

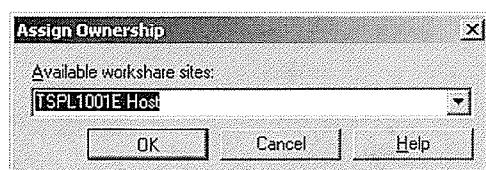
25. Exit Drawing

26. Assign Ownership of drawing to the Host.

27. Select Workshare > Assign Ownership



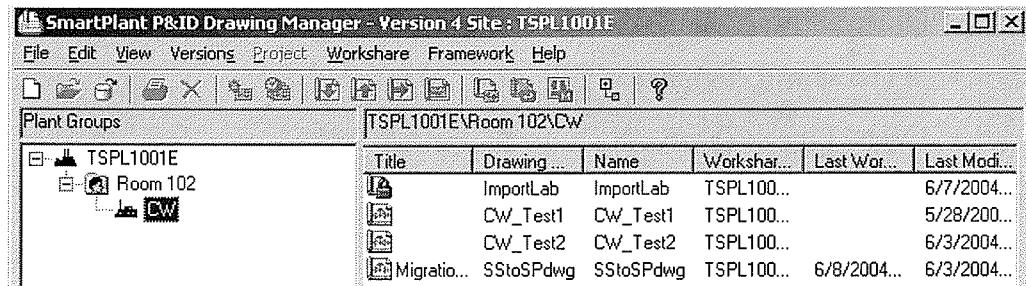
28. Select site Host to Assign Ownership.



29. Exit and re-enter Drawing Manager

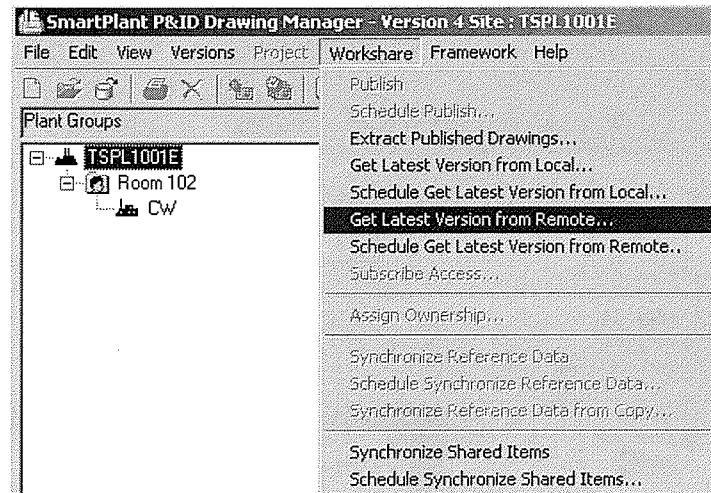
30. Connect to the Host Site

- Note The drawing has the Red lock

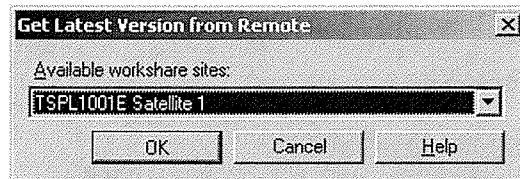


31. Select the Plant

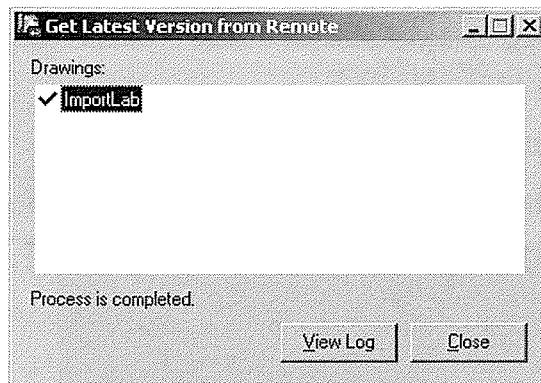
32. Select Workshare > Get Latest Version from Remote



33. Select the Site from which you will be taking Ownership from.



- Process will complete
- View Log
- Select Close



34. Note the drawing does not have the Red lock

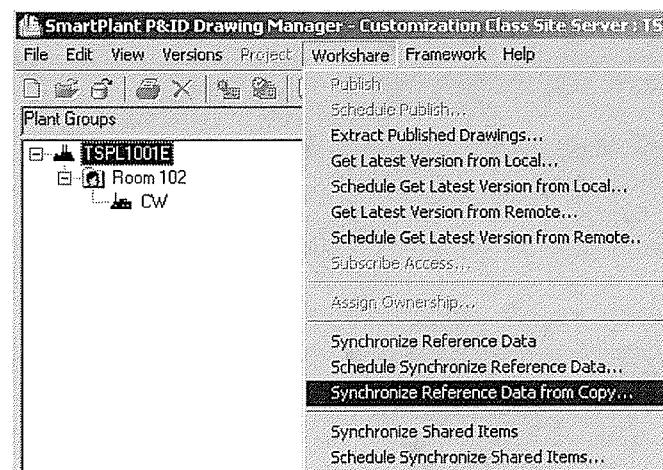
A screenshot of the "SmartPlant P&ID Drawing Manager - Version 4 Site: TSPL1001E" application. The window title is "SmartPlant P&ID Drawing Manager - Version 4 Site: TSPL1001E". The menu bar includes File, Edit, View, Versions, Project, Workshare, Framework, and Help. The toolbar has various icons for file operations. The main area is divided into two panes: "Plant Groups" on the left and a list view on the right. In the "Plant Groups" pane, there is a tree structure with "TSPL1001E" expanded, showing "Room 102" and "DW". In the list view, there is a table with columns: Title, Drawing..., Name, Workshar..., Last Wor..., and Last Mod... . The table contains four rows:

Title	Drawing...	Name	Workshar...	Last Wor...	Last Mod...
ImportLab	ImportLab	ImportLab	TSPL100...	6/8/2004...	
CW	CW_Test1	CW_Test1	TSPL100...	5/28/200...	
	CW_Test2	CW_Test2	TSPL100...	6/3/2004...	
	Migration...	SStoSPdwg	SStoSPdwg	TSPL100...	6/8/2004...

Lab 4 – Workshare: Manually Synchronizing Reference Data

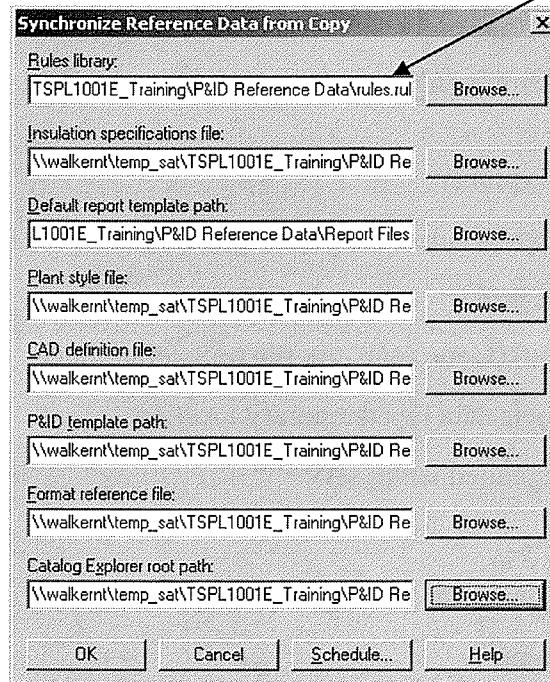
Purpose: Manually Synchronizing Reference Data from the Host to a Satellite Site.

1. From Windows Explorer:
 - Winzip the reference data for Plant ~\P&ID Reference Data
 - Save Full Path Info
2. From Email, FTP, CD, etc. send .zip file to Satellite Site
3. Satellite Site extracts data to a temporary location.
 - Create a folder called temp_sat
 - Share the folder
 - Unzip data to temp_sat folder
 - Use Folder Names
4. Enter Drawing Manager
5. Verify you are at the **Satellite Site**, if not select **File > Open Database, Site Server**, select **Satellite INI** file, select **Plant Structure**, select **Open**
6. Select Plant
7. Select **Workshare > Synchronize Reference Data from Copy**.



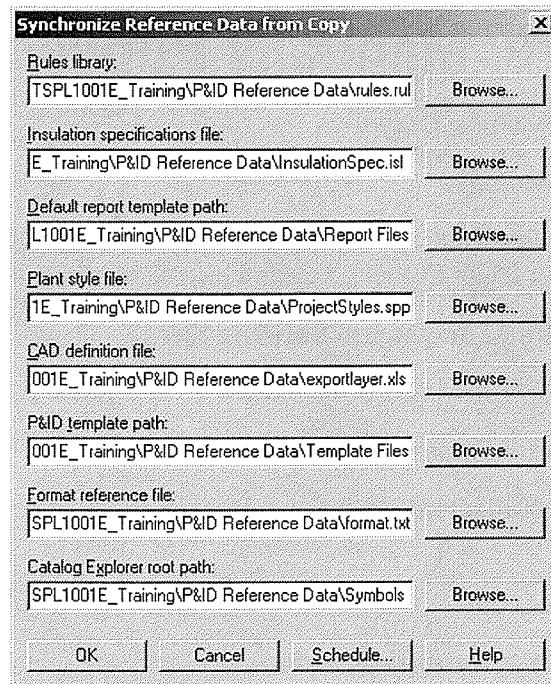
8. Input temporary location of files.

- Requires UNC path



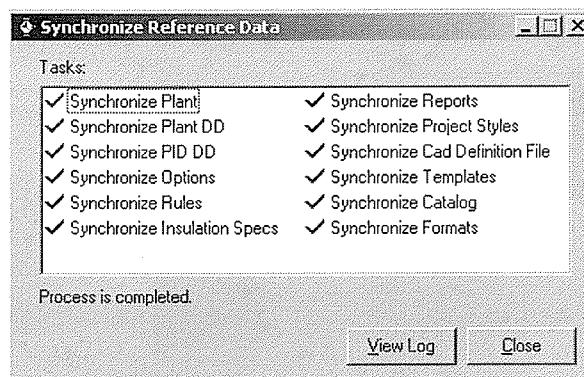
NOTE: In class the path will be different.

9. Note: filename or folder name in the below.



10. Select OK

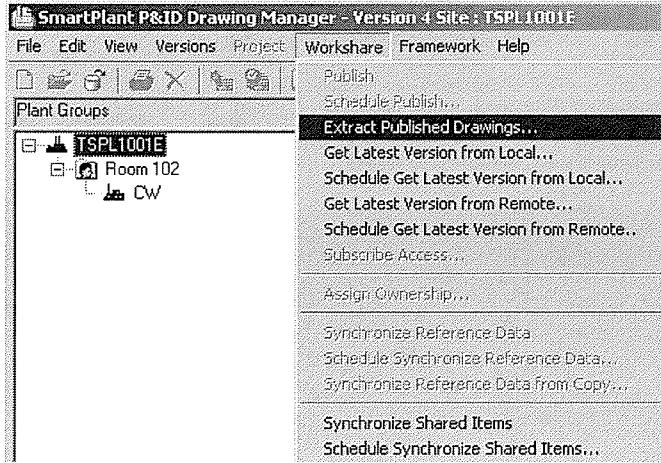
- View Log File
- select Close



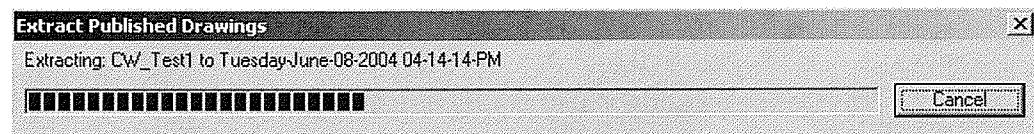
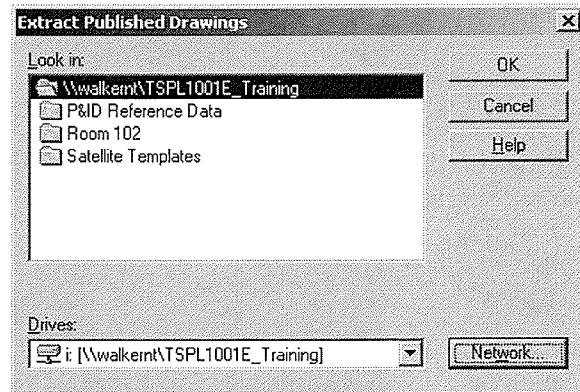
Lab 5 – Workshare: Manually Publishing

Purpose: Manually Publishing Drawings

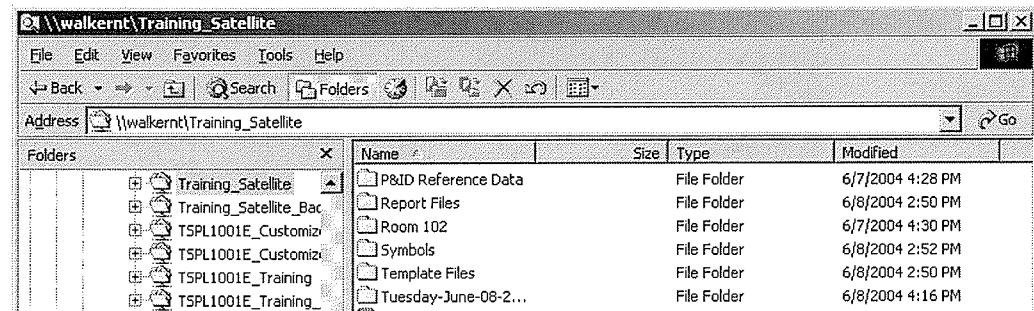
1. Enter **Drawing Manager**
2. Verify you are at the **Host Site**, if not select **File > Open Database, Site Server**, select **Host INI file**, select **Plant Structure**, select **Open**
3. **Assign Ownership** of drawing to **Satellite Site**
4. Select Drawing
5. Select **Workshare > Assign Ownership**
6. **Publish** and give **Subscription Access** of two different drawings to Satellite Site
 - a. Select Drawings
 - b. Select **Workshare > Publish Drawings**
 - c. Select **Workshare > Subscribe Access**
7. Extract Publish Drawings
 - a. Select Plant
 - b. Select **Workshare > Extract Publish Drawings**



8. Define location where zip file will be extracted.
9. Select **OK**



10. Send Folder and .zip files to Satellite Site via Email, FTP, CD, etc.



11. Connect to the Satellite Site

12. Verify you are at the Satellite Site, if not select File > Open Database, Site Server, select Satellite INI file, select Plant Structure, select Open
- a. If required, Synchronize Reference Data at Satellite with Host

1. Workshare > Synchronize Reference Data³

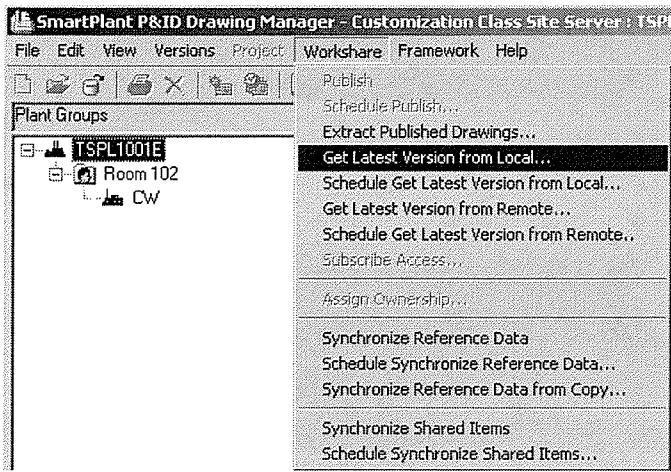
13. Get Drawings

14. Select Plant

15. Select Workshare > Get Latest Version from Local

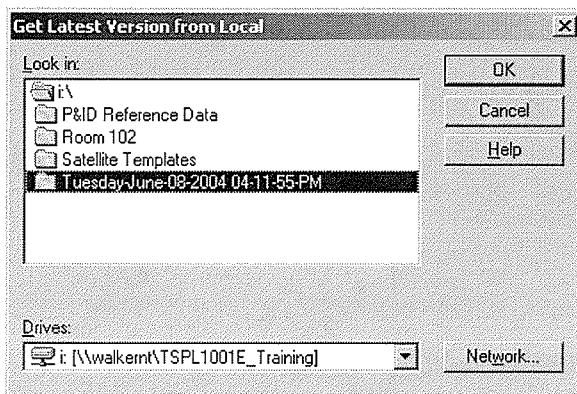
³ When the network connection between the Host and Satellite Site is abnormal (db_link is down) the SPPID modeler sometimes will not be able to open the drawing even though this drawing belongs to this site.

The solution is when the dblink is down the Site owns is determined by what they owned at the time of the last Synchronize of Reference Data which happens to also copy the Plant Schema contents to the Satellite. We recommend that to avoid this situation that you always run Synchronize Reference Data after Getting Ownership of or creating new drawings.



16. Define location where zip file are located.

a. Select **OK**

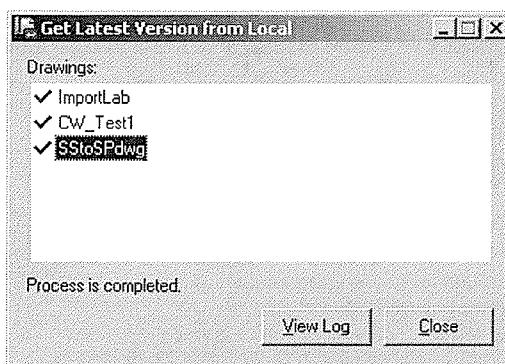


17. Select the Site from where the Drawings were Published/Ownership Assigned.

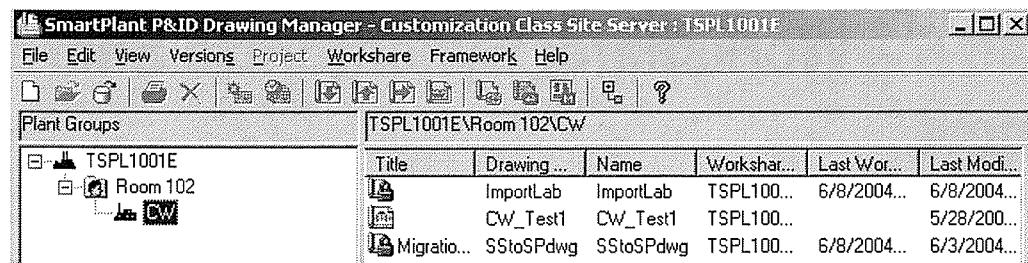
18. Process will complete

a. View the Log

b. Select Close



19. Open Drawing in which you have Ownership.



20. File > Exit Drawing

Lab 6 – Workshare: Synchronize Shared Items

Purpose: Using Synchronize Shared Items

In this example of the Synchronize Shared Items operation:

The Host Site has placed an OPC and then moved the mate into the Drawing Stockpile of a Drawing at the Satellite Site. The Satellite has Ownership of the drawing for which the OPC was placed in the Drawing Stockpile.

The Host Site will need to Synchronize Shared Items to update the InterSiteOPC table at the host.

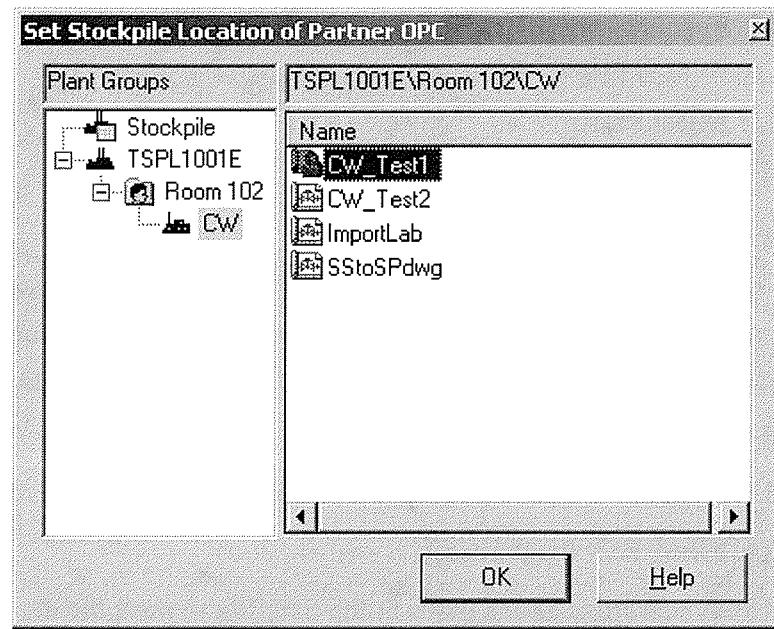
The Satellite Site will need to Synchronize Shared Items to read and update the InterSiteOPC table at the host (the Satellites have a view back to this table) and to pick up the OPC in the Drawing Stockpile.

After placing the OPC on the drawing at the Satellite Site the Satellite Site will Synchronize Shared Items again to update the GOID in the T_Representation table since the OPC was placed on a drawing.

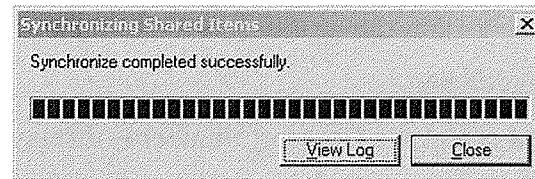
The Host will need to Synchronize Shared Items to receive information, such as Pipe Run data, from the Satellite.

Transferring Shared Items (OPCs) from the Host to a Satellite Site

1. Enter Drawing Manager
2. Verify you are at the **Host Site**, if not select **File > Open Database, Site Server**, select **Host INI file**, select **Plant Structure**, select **Open**
3. Open a Drawing
4. Place assembly control01.pid and place an **OPC** on the end of a **Pipe Run**.
5. Send the mating **OPC** to a **Drawings' Stockpile** at the **Satellite Site**.



6. From the EDE discriminate on OPCs
7. Display **Active Drawing, Active Drawing Stockpile, Stockpile, and Other Drawings**. Note the OPC that you just placed.
8. **File > Exit** the drawing.
9. **Synchronize Shared Items** to push the **OPC** placed in the **Drawing Stockpile** to the **Satellite Site**.
 - a. Select **Plant**
 - b. Select **Workshare > Synchronize Shared Items**



- c. **View the Log**

OPC - Tag:<102> OPC ID:<122E3453A8A5464C8ED674B87ECE890E> Operation:<Update Send.>

OPC - Tag:<102> OPC ID:<B2F8AE91713B493CBFA05F2B3C52B2E9> Operation:<Send.>Connect to Satellite Site

10. Select **File > Open Database, Site Server**, select **Satellite INI file**, select **Plant Structure**, select **Open**

11. Synchronize Shared Items to get the OPC pushed to the Satellite Site from the Host Site.

a. Select **Plant**

b. Select **Workshare > Synchronize Shared Items**

c. View the Log

OPC - Tag:<102> OPC ID:<B2F8AE91713B493CBFA05F2B3C52B2E9> Operation:<Receive.>

OPC - Tag:<102> OPC ID:<122E3453A8A5464C8ED674B87ECE890E> Operation:<Update Receive.>

OPC - Tag:<102> OPC ID:<B2F8AE91713B493CBFA05F2B3C52B2E9> Operation:<Update Send.>

12. Open the drawing

13. Place OPC from Drawing Stockpile.

14. **File > Exit** the drawing.

15. Synchronize Share Items at the Satellite to push the data from placing the OPC on the drawing to the Host.

a. Select **Plant**

b. Select **Workshare > Synchronize Shared Items**

16. Connect to the Host Site

17. Verify you are at the Host Site, if not select **File > Open Database, Site Server**, select **Host INI file**, select **Plant Structure**, select **Open**

18. Synchronize Shared Items

a. Select **Plant**

b. Select **Workshare > Synchronize Shared Items**

c. **File > Open** drawing.

Notes: Review the OPC and notice the Drawing Number is displaying on the OPC.

BONUS LAB:

1. Create a Loop at the Host and enable the Loops to be utilized at the Satellite Site

Hint: IS Shared property = True and Synchronize Shared Items.

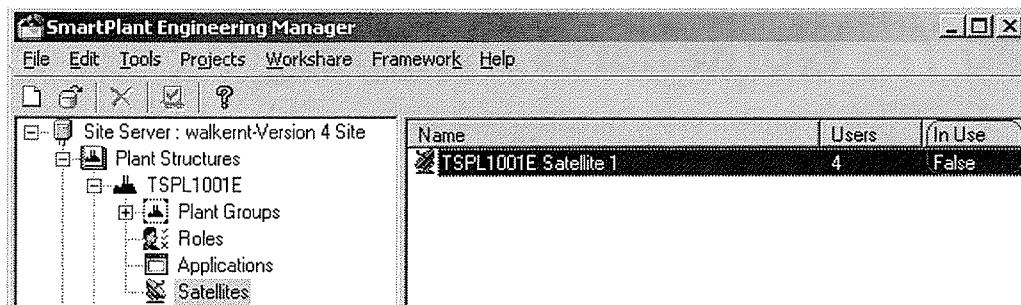
Lab 7 – Workshare: Disabling

1. Connect to the **Satellite Site** through **Drawing Manager**.
2. Select **File > Open Database, Site Server**, select **Satellite INI file**, select **Plant Structure**, select **Open**
3. Create a dummy drawing.
4. Place all **Plant Items** from the **Stockpile** into this drawing

 **Notes:** Every “Plant” (Host and Satellite) has their own stockpile. If there are items in the Satellite Plant's stockpile that require returning to the Host stockpile, place them into a “dummy” drawing for shipping back to the Host.

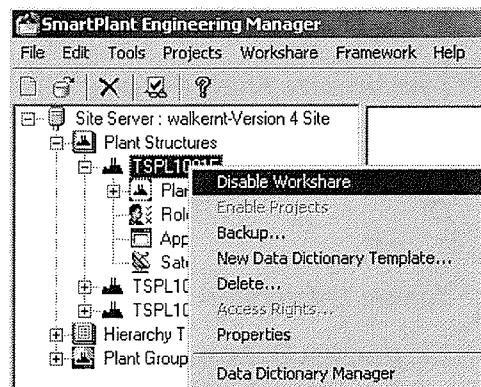
5. Select **Workshare > Synchronize Shared Items** to synch the shared items at the **Satellite** with the **Host Site**.
6. **Assign Ownership of ALL drawings to the Host Site**
 - a. Select Drawing
 - b. Select **Workshare > Assign Ownership**
7. Connect to the **Host Site** through **Drawing Manager**.
8. Select **File > Open Database, Site Server**, select **Host INI file**, select **Plant Structure**, select **Open**
9. Select **Workshare > Synchronize Shared Items** to synch the shared items at the **Host** with the **Satellite Site**.
10. Get the Latest Version of Drawing from the **Satellite Site**.
 - a. Select **Plant**
 - b. Select **Workshare > Get Latest Version from Remote**
11. Connect to the **Satellite Site** via **SmartPlant Engineering Manager** to **delete the Satellite Plant**.
12. Connect to the **Host Site** via SmartPlant Engineering Manager.
 - a. Verify the **In Use** property = **False** for the **Satellite Site**.

 **Notes:** If the **In Use** property does not equal **False** then you will not be able to **Disable Workshare**.

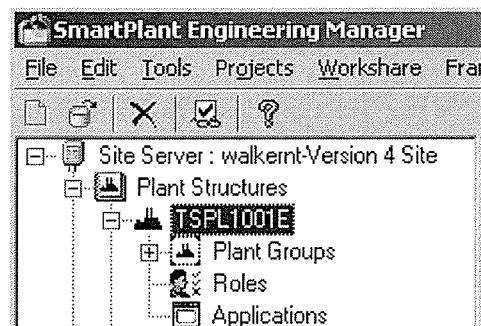


13. Select the plant and disable workshare.

a. **Workshare > Disable Workshare**



14. The Satellite Node beneath the plant in the above image will not be available once workshare has been disabled, note the below image.

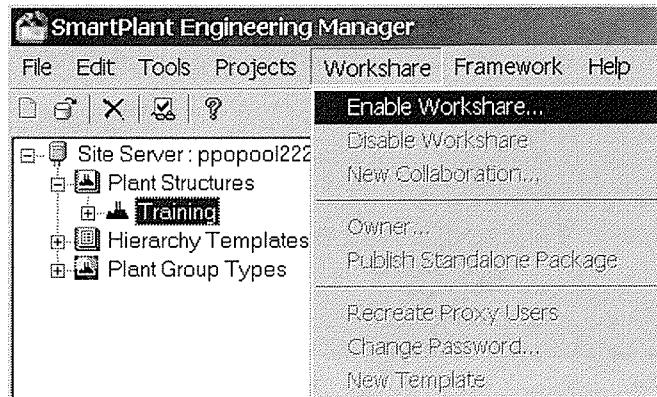


Lab 8 – Standalone Workshare

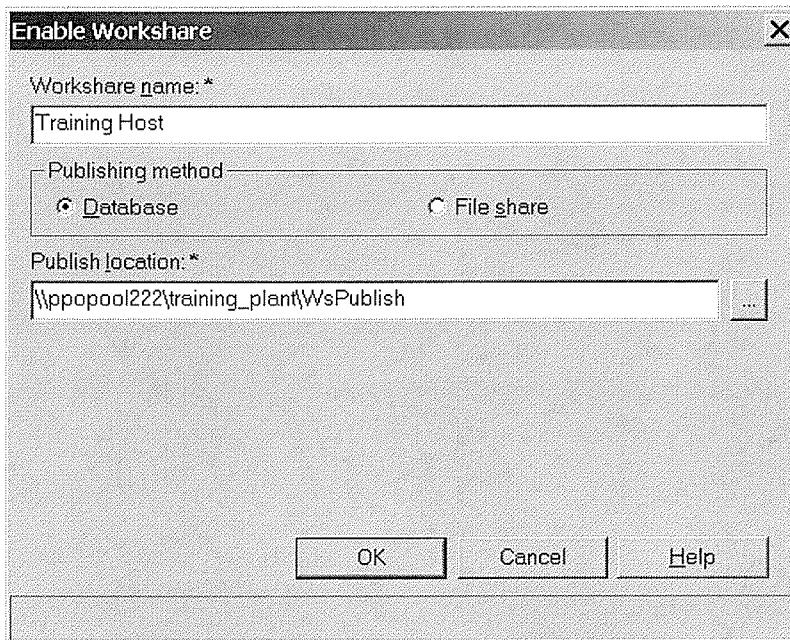
Enabling Workshare at the Host

1. From the Host Site

- a. Enable Workshare
 - i. Select the Plant
 - ii. Select from the menu Workshare > Enable Workshare



- b. On the Enable Workshare form



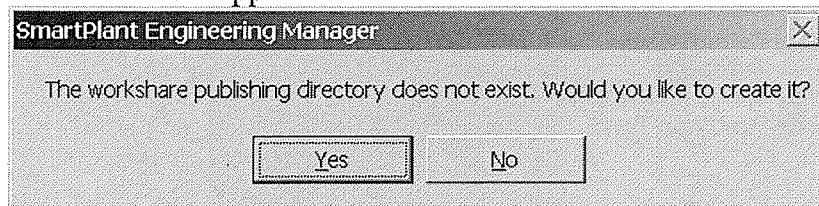
- i. **Workshare name** - Type a name for the plant being enabled for Workshare. This name will be seen by the satellite site/location.
- ii. **Publishing method** - Select the publishing method to be used to share data contained in the plant.

Because SmartPlant Engineering Manager now supports standalone Workshare functionality, the file sharing method is being phased out and will be unsupported in the next release. We recommend using the database publishing method for all Workshare collaborations.

- iii. **Publish location** - Type a UNC path to the shared location on the host site where the published drawings are to be stored. The default location is the **WsPublish** folder in the plant folder. This field is limited to 255 characters.
- iv. **Select OK**

2. If the **Publish Location** folder does not exist you will be prompted for the folder to be created.

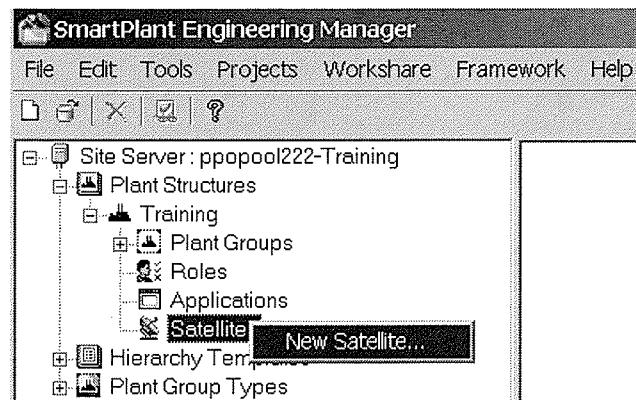
- a. Select **Yes** if applicable



Creation of Satellite Slot at Host

3. Once Workshare has been enabled at the Host a Satellite node will be available under the Plant node.

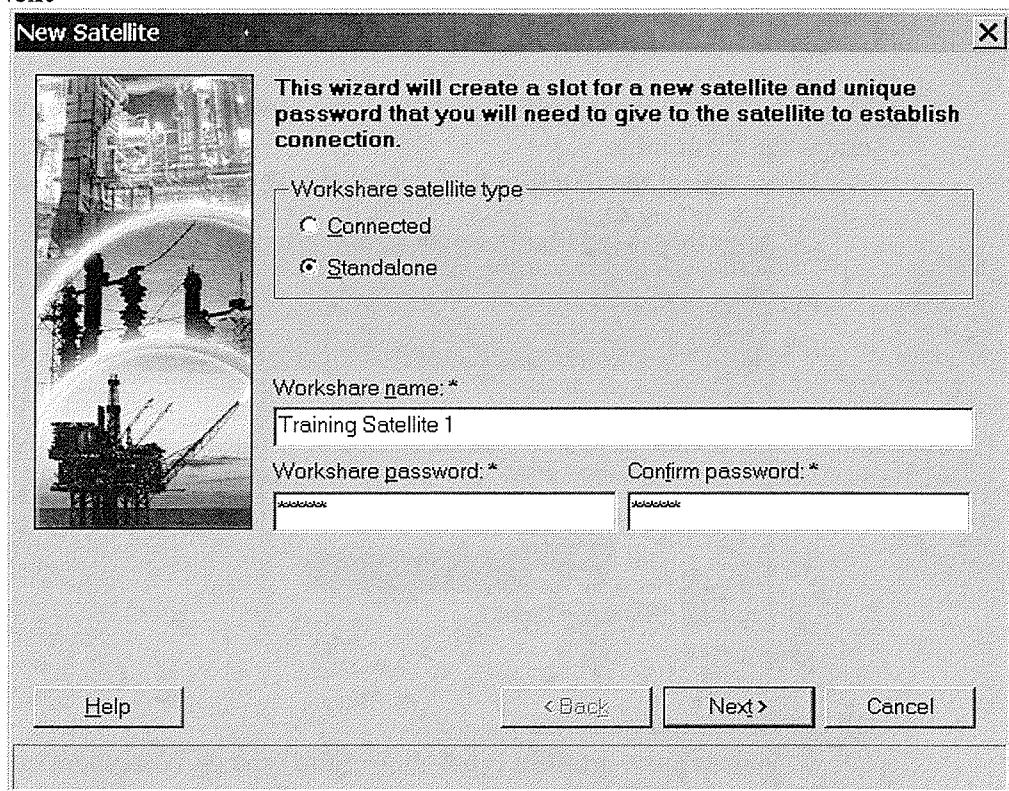
- Select the Satellite node, right mouse click and select **New Satellite**.



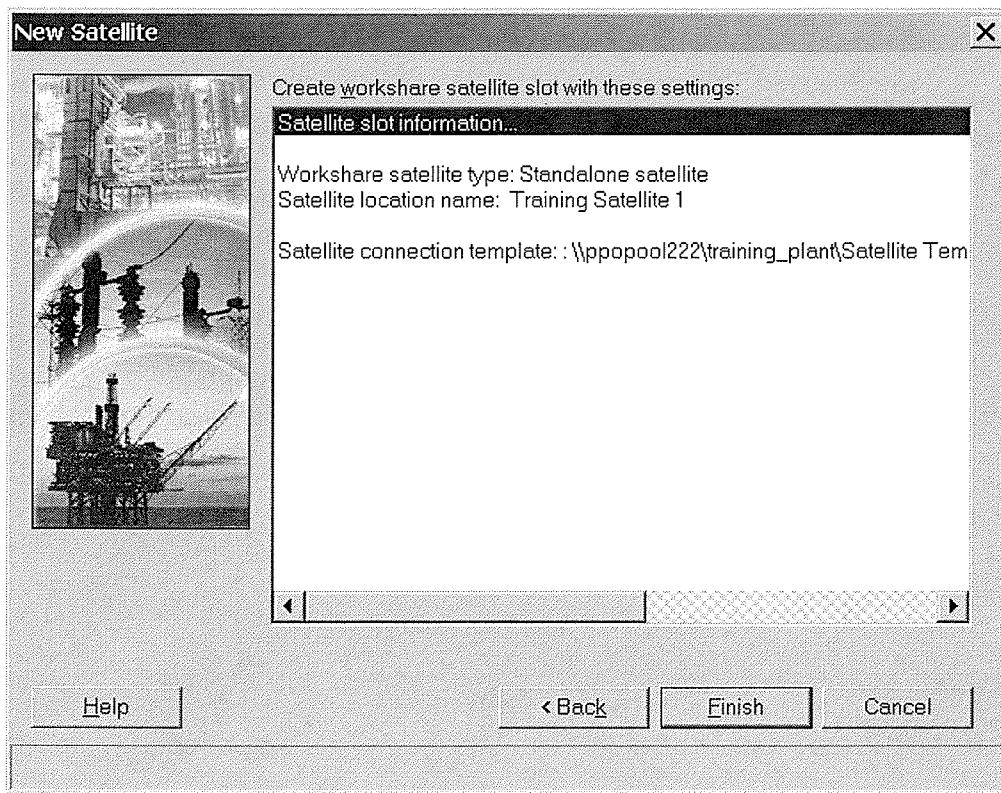
4. On the New Satellite form

- Workshare satellite type** - Select the type of Workshare collaboration for this new satellite slot.
 - Standalone** - Specifies that this satellite slot will not collaborate through a database. This type of Workshare collaboration allows the host and satellite to use different databases locally.
- Workshare name** - Use the default name provided or type a name for this satellite slot. This name is used as the name of the slot in the **Satellites** node and must be unique per satellite slot. This name cannot contain any of the following characters: <,>?^"();[]{}~!%*
- Workshare password** - Type a password for the satellite slot. The password is case-sensitive. This password will be needed by the user at the remote site who will be connecting to this satellite slot, and can be changed later, if necessary.
- Confirm password** – Re-type the password. (Be sure to make a note of this password because there is no way to retrieve it if you forget it. You must delete and re-create the satellite slot if you forget the password that you set here.)

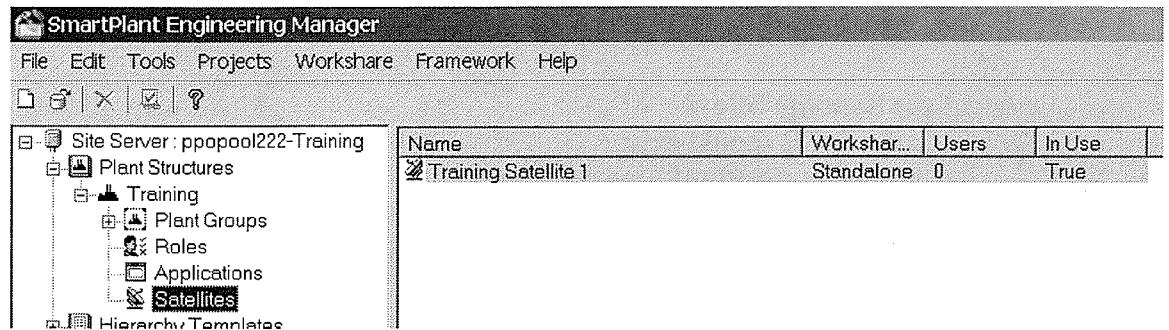
e. Select **Next**



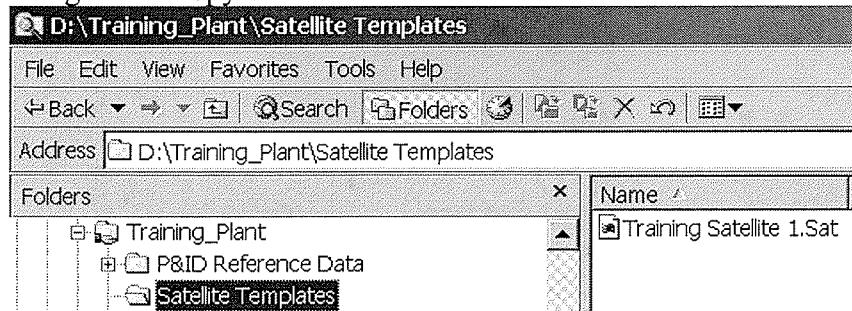
f. Select **Finish**



5. At this point the Host will have an entry under the Satellite node the one (1) satellite slot.



- a. A .sat file (Satellite Template) will also be created on the application server within the Plant Structure folder. The Satellite Site will utilize the .sat file along with a copy of the P&ID Reference Data to create his Plant.

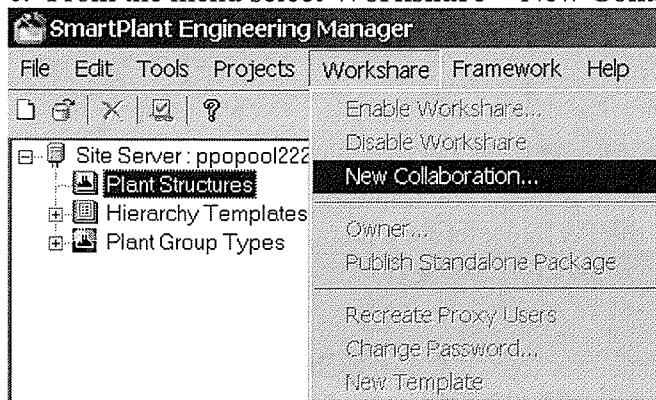


- b. Send .sat file, password utilized during the creation of the .sat file and a copy of the P&ID Reference Data from the Host Plant to the Satellite Site.

Satellite Site executing WorkShare Collaboration with Host

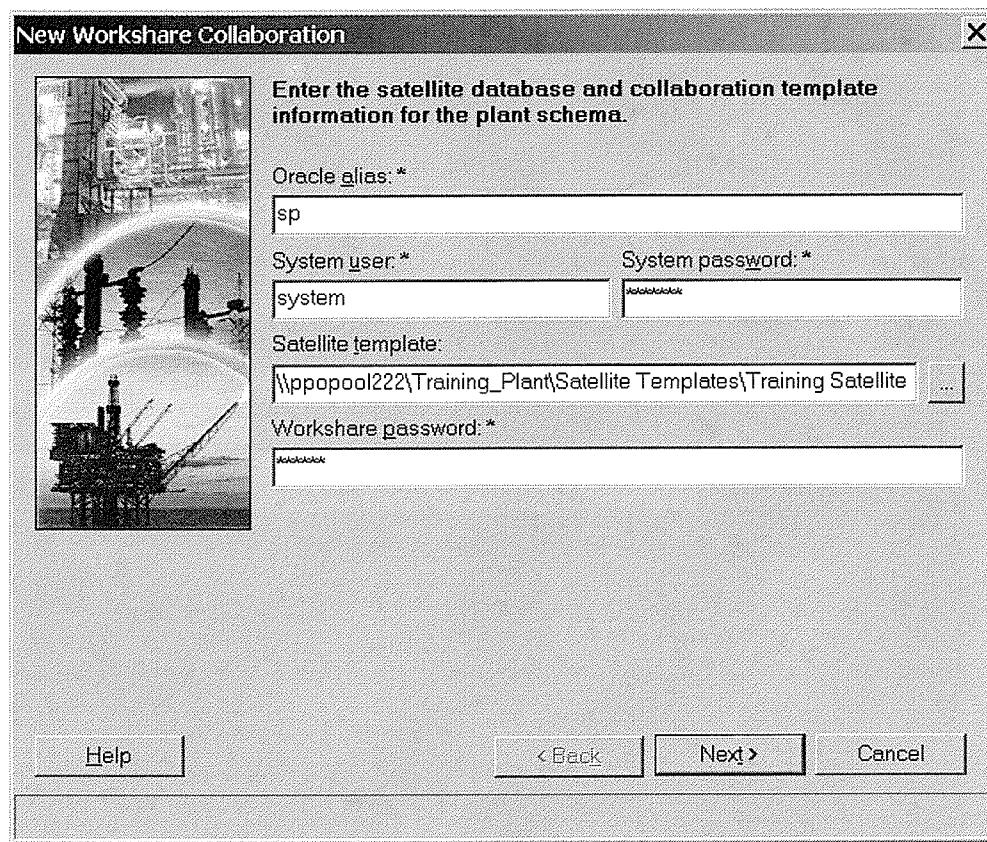
6. At the Satellite Site

- a. A SITE should exist
- b. Select the **Plant Structure** node
- c. From the menu select **Workshare > New Collaboration**

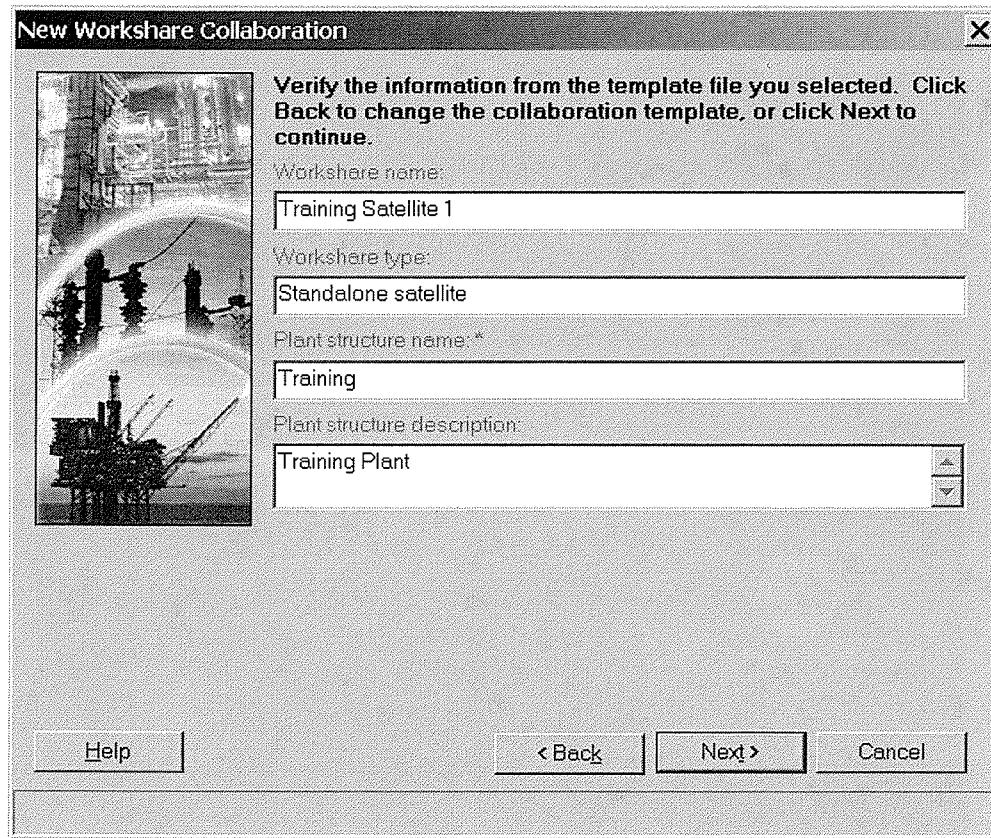


7. On the New Workshare Collaboration form

- a. **Oracle alias** - Specifies the Oracle net service alias that allows connection to the Oracle database at the satellite site. This field defaults to the alias specified when the satellite site was created.
- b. **Database node** - Type the node name of the server on which the SQL Server database resides. This option appears only if SQL Server is selected as the database type.
- c. **System User** - Type a database system user name. This name does not have to be the database administrator user name, but this user must have system privileges.
- d. **System password** - Type a system user password.
- e. **Satellite template** - Type the UNC path or browse to the location where you placed the satellite template file (.sat) received from your host administrator. This field is limited to 255 characters.
- f. **Workshare password** - Type the Workshare password. This password, sometimes called a location key, is specified during the satellite slot creation at the host site. The host administrator must provide you with this password as the key to connecting your satellite with a satellite slot at the host site.
- g. Select **Next**



8. On the New Workshare Collaboration form
 - a. **Workshare name** - Displays the name of the satellite slot at the host to which you are connecting.
 - b. **Workshare type** - Displays the type of Workshare collaboration available through the satellite slot.
 - c. **Plant structure name** - Displays the name of the plant containing the satellite slot.
 - d. **Plant structure description** - Displays the available information about the plant containing the satellite slot.
 - e. Select **Next**

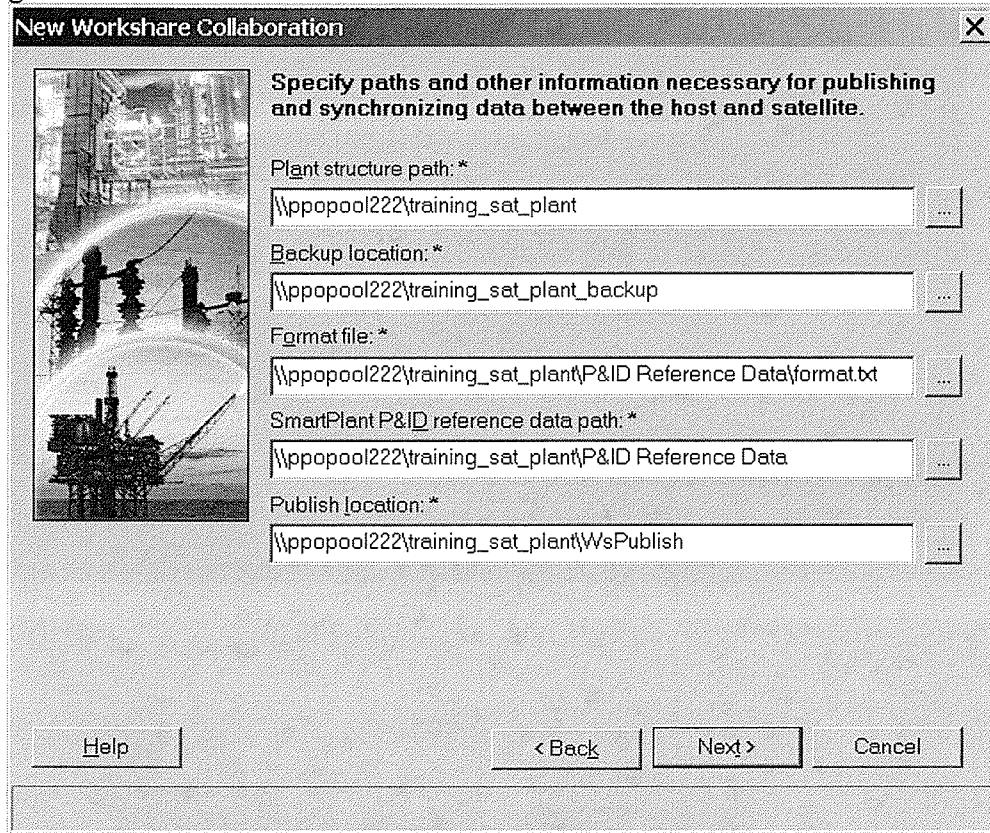


9. On the New Workshare Collaboration form
 - a. **Plant structure path** - Specify the path to the storage location on the satellite server for the plant data and the drawing files. You must create the plant structure share before running this wizard, using the form `\siteserver\sitename\planname`. The wizard will create the *planname* folder if it does not already exist.
 - b. **Backup location** - Type, or browse to, the path to the storage location to use when backing up the satellite plant files. We recommend selecting a backup location outside the **Plant structure path** to avoid recursive backups being stored in a single backup file. For example, if the **Plant structure path** is `\siteserver\sitename\planname`, do not set the backup location for *planname* to `\siteserver\sitename\planname\backups`.
 - c. **Format file location** - Type, or browse to, the format.txt file. This file is delivered to the SmartPlant P&ID reference data path defined below.
 - d. **SmartPlant P&ID reference data path** - Type, or browse to, the path where the reference data is located at the satellite site.
 - e. **Publishing method** - Select the publishing method to be used to share data contained in the plant.
 - i. **Database** - (Recommended) Published files are stored in the database as Oracle blobs at the host. Oracle database links are used to transfer published files between host and satellites.

Because SmartPlant Engineering Manager now supports standalone Workshare functionality, the file sharing method is being phased out and will be unsupported in the next release. We recommend using the database publishing method for all Workshare collaborations.

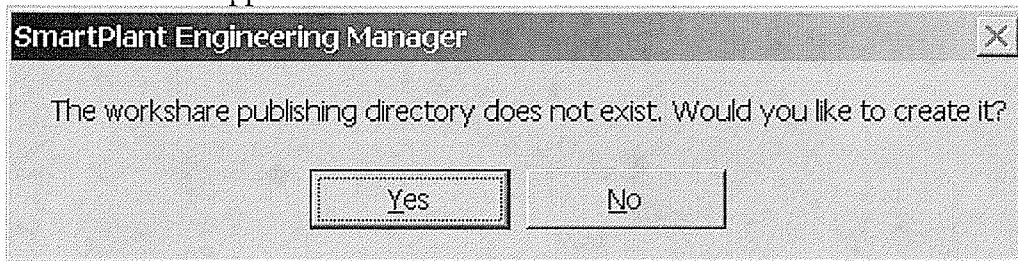
- f. **Publish location** - Type a UNC path to the shared location on the satellite site where the published drawings are to be stored. This field is limited to 255 characters and is available only for standalone satellites or for connected satellites using the file share publishing option.

- g. Select **Next**

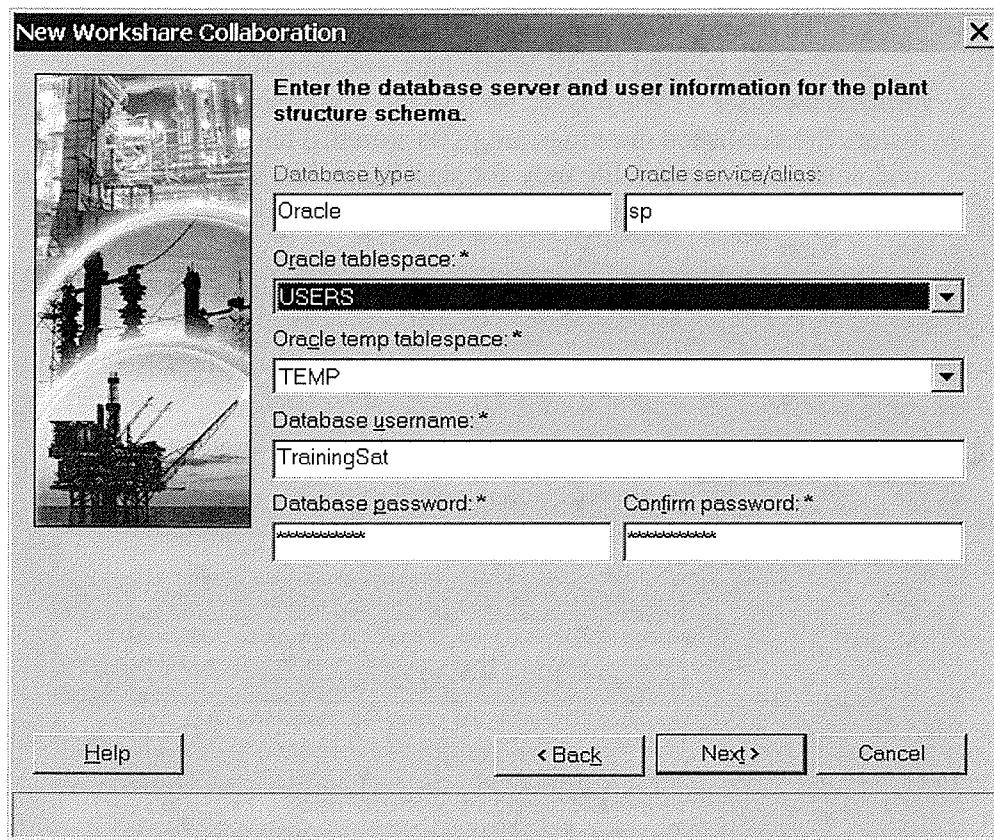


10. If the **Publish Location** folder does not exist you will be prompted for the folder to be created.

- a. Select **Yes** if applicable



11. Define the database info for the Satellite Plant.



New Workshare Collaboration

Enter the database server and user information for the plant structure data dictionary.

Database type: Oracle Oracle service/alias: sp

Oracle tablespace: * USERS

Oracle temp tablespace: * TEMP

Database username: * TrainingSatd

Database password: * Confirm password: *

Help | < Back | Next > | Cancel

New Workshare Collaboration

Enter the database server and user connection information for SmartPlant P&ID schema.

Application to associate: SmartPlant PID Schema type: SPPID

Oracle service/alias: sp

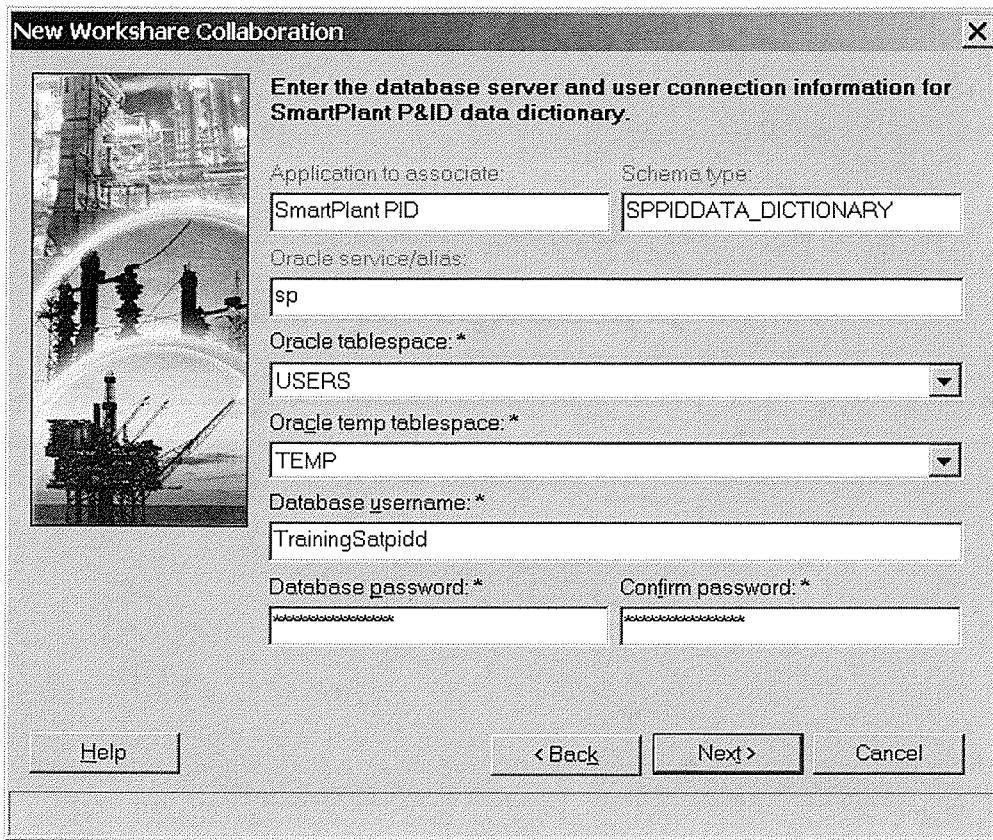
Oracle tablespace: * USERS

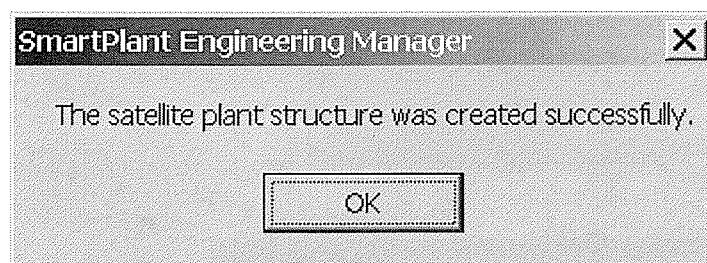
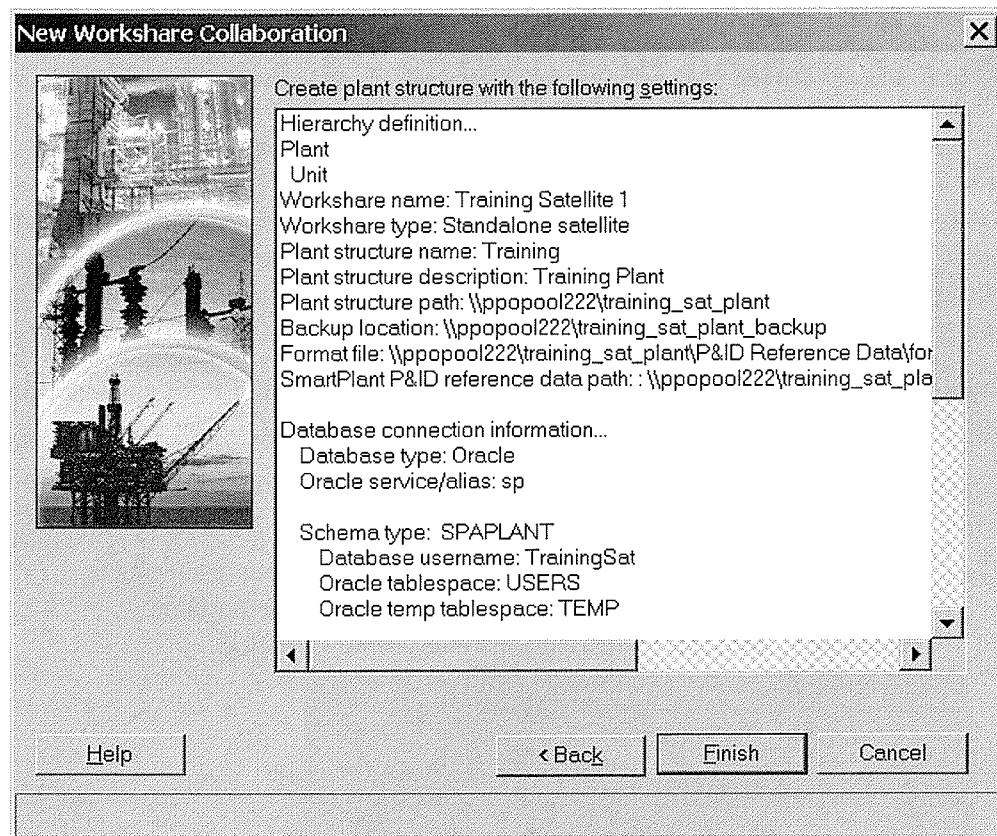
Oracle temp tablespace: * TEMP

Database username: * TrainingSatpid

Database password: * Confirm password: *

Help | < Back | Next > | Cancel





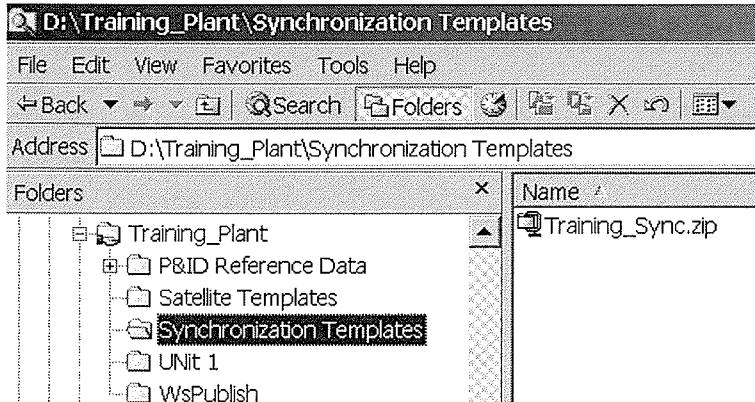
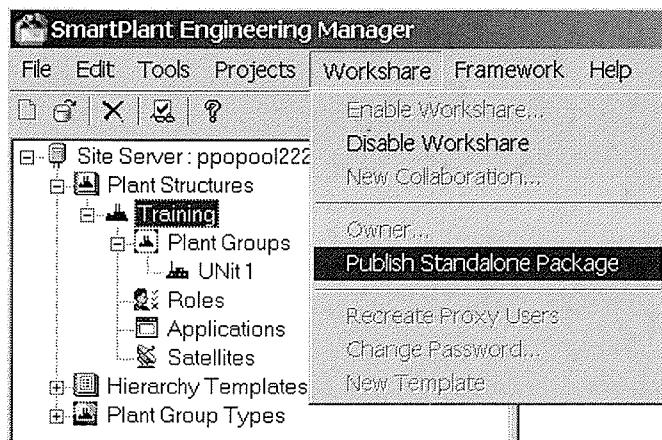
- a. Define the Roles, user access, to the satellite plant.

Host Publishing Standalone Package

12. At the Host Site through SmartPlant Engineering Manager select Workshare > Publish Standalone Package command. This command will bundle the database portion of the reference data (plant and application schemas and data dictionaries, plant structure, and options data) into a zip file (*plantname_sync.zip*) for manual transmission to the standalone satellite. This zip file is placed in the Synchronization Templates folder under the plant folder at the host site.

The satellite site accesses this file in Drawing Manager using the Published standalone package file field on the Synchronize Reference Data by Copy dialog box.

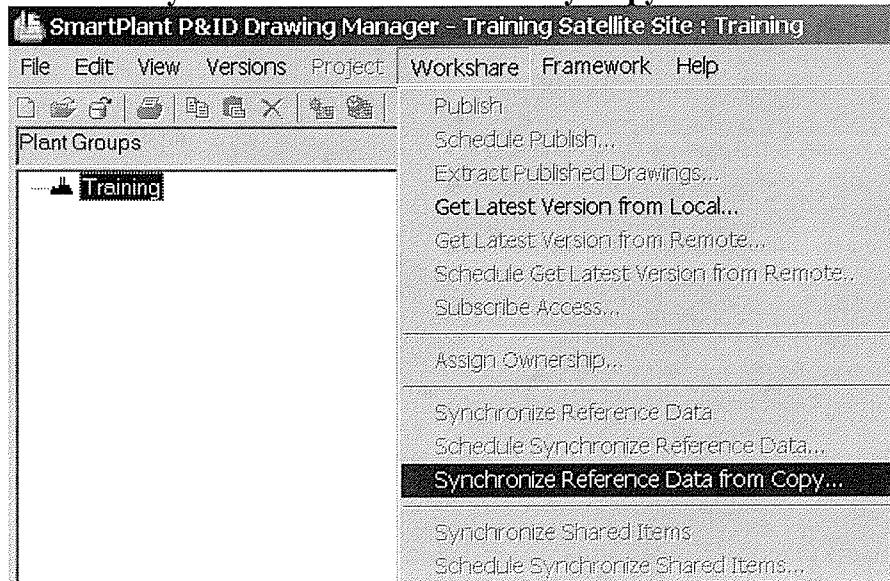
- This command is available only at the host in a standalone Workshare collaboration.
- The host should run this command before publishing drawings to standalone satellite sites, after changes are made to the Data Dictionary, Symbol Modifications or Symbol Creation.



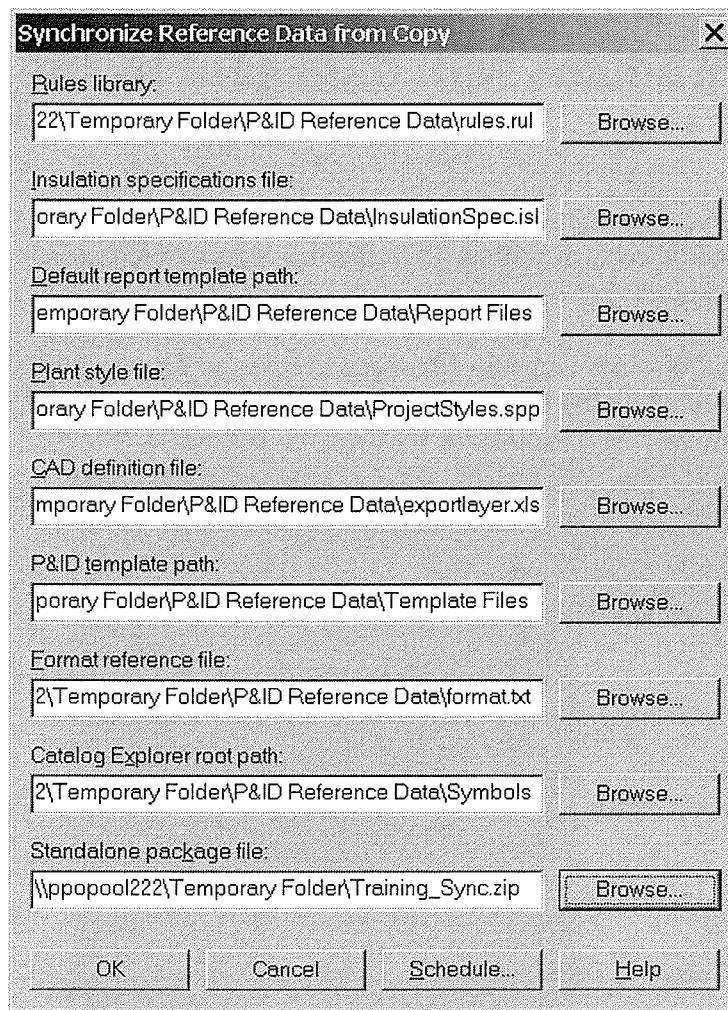
13. The Host site should send the .zip file created by the Workshare > Publish Standalone Package and a copy of the P&ID Reference Data to the Satellite Site

Satellite Synchronizes with data sent by the Host

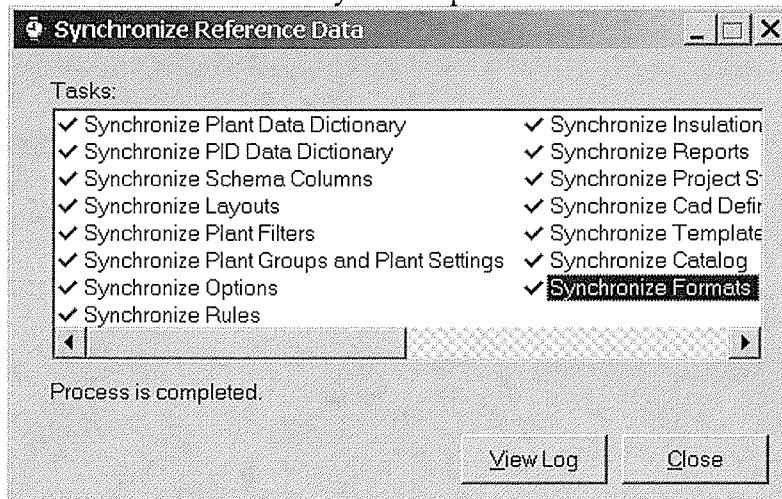
14. At the Satellite Site place the .zip file created by the Workshare > Publish Standalone Package and the copy of the P&ID Reference Data to a temporary location on the application server.
15. From the Satellite Plant, through Drawing Manager, access the files sent to the satellite site that was created by the **Published Standalone Package** through the **Workshare > Synchronize Reference Data by Copy command**.



16. On the **Synchronize Reference Data from Copy** form, fill out the temporary location to the P&ID Reference Data files and the **Standalone Package File**.

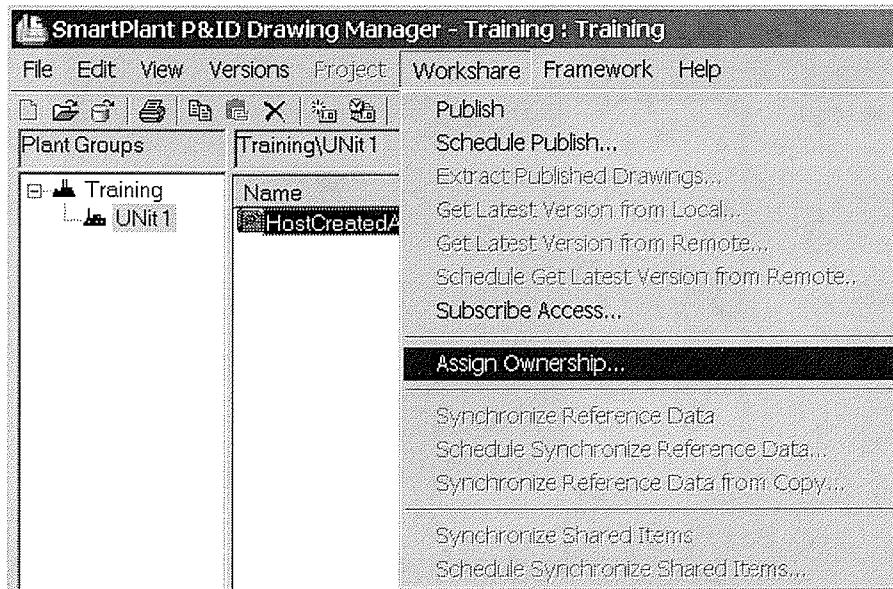


17. The Satellites Plant will be synched up with the data received from the Host.

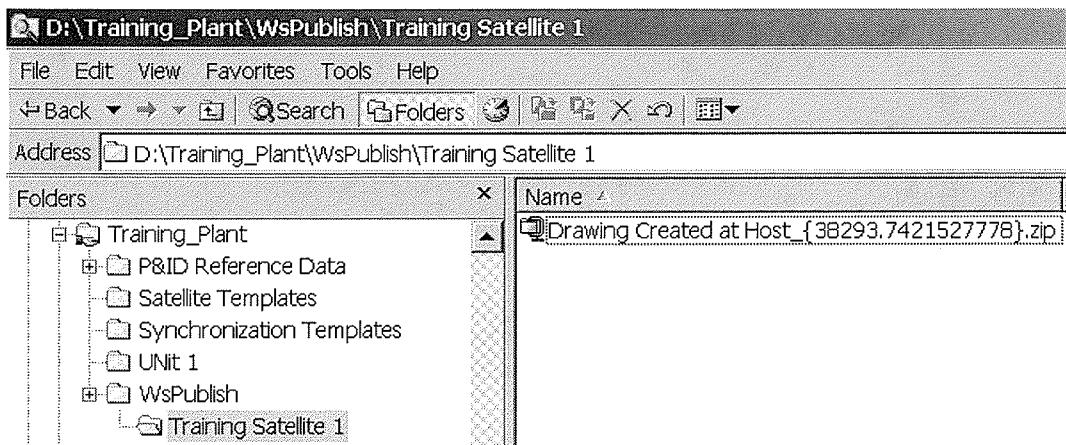


Host Assigning Ownership of Drawing to Satellite

18. At the Host Site, through Drawing Manager, utilize the **Workshare > Assign Ownership** command to send a drawing to the Satellite Site with Read/Write ability.

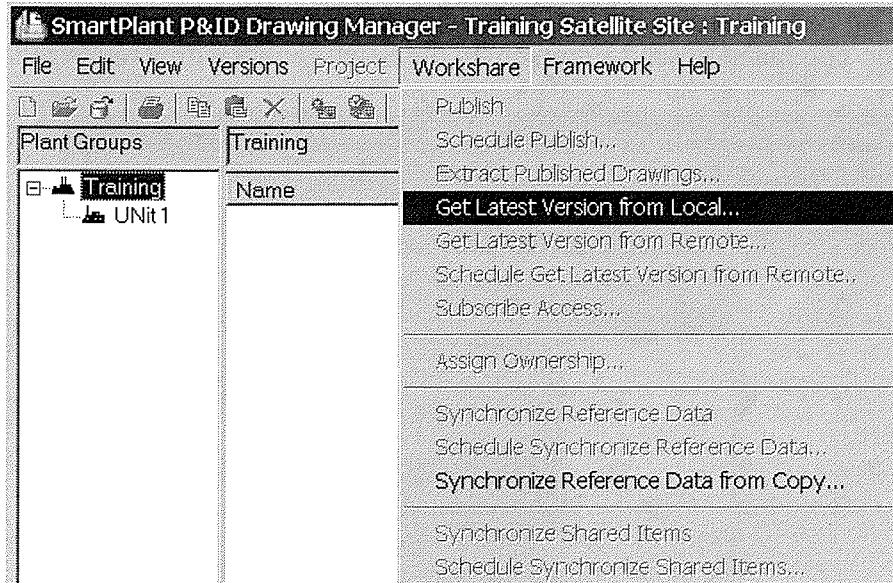


19. At the Host Site, a zip file will be created which needs to be sent to the Satellite Site, including the folder name, i.e. Training Satellite 1

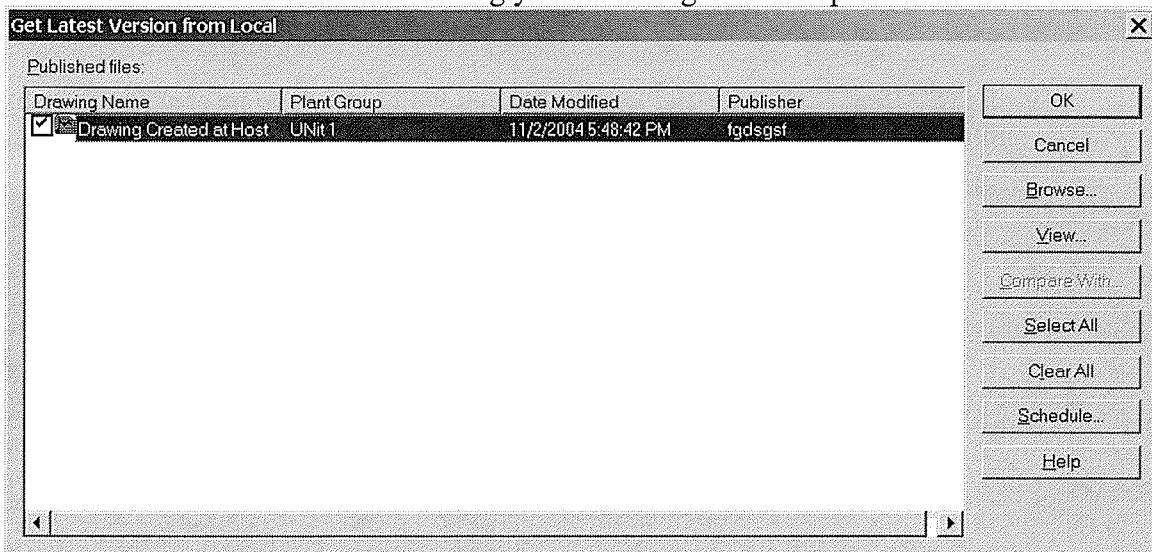


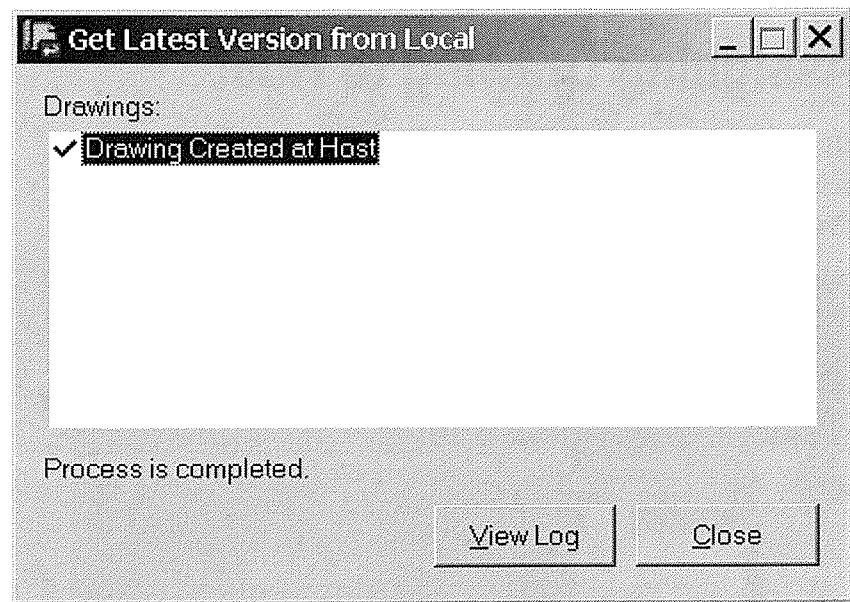
Satellite takes Ownership of Drawing

20. At the Satellite, the zip file will be stored on the file system and accessed via the Workshare > Get Latest Version from Local.....



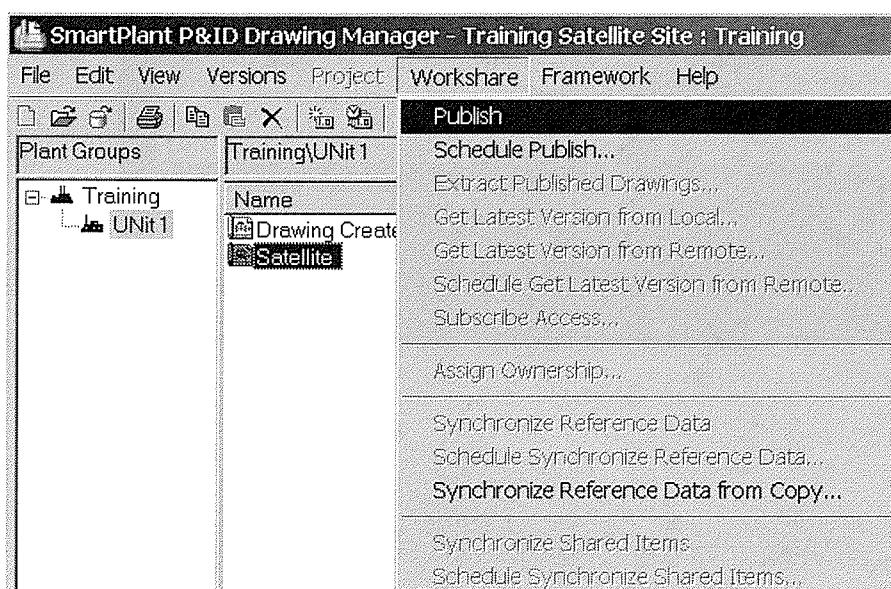
21. Select the Check Box next to the Drawing you are taking Ownership of.



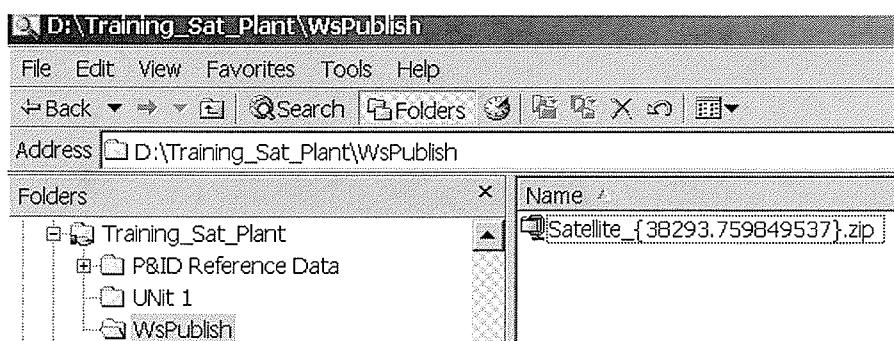


Satellite Assigning Drawing to Host

22. For the Satellite to Assign the Host a Drawing, execute the following steps.
- Select the Drawing.
 - Select **Workshare > Publish**

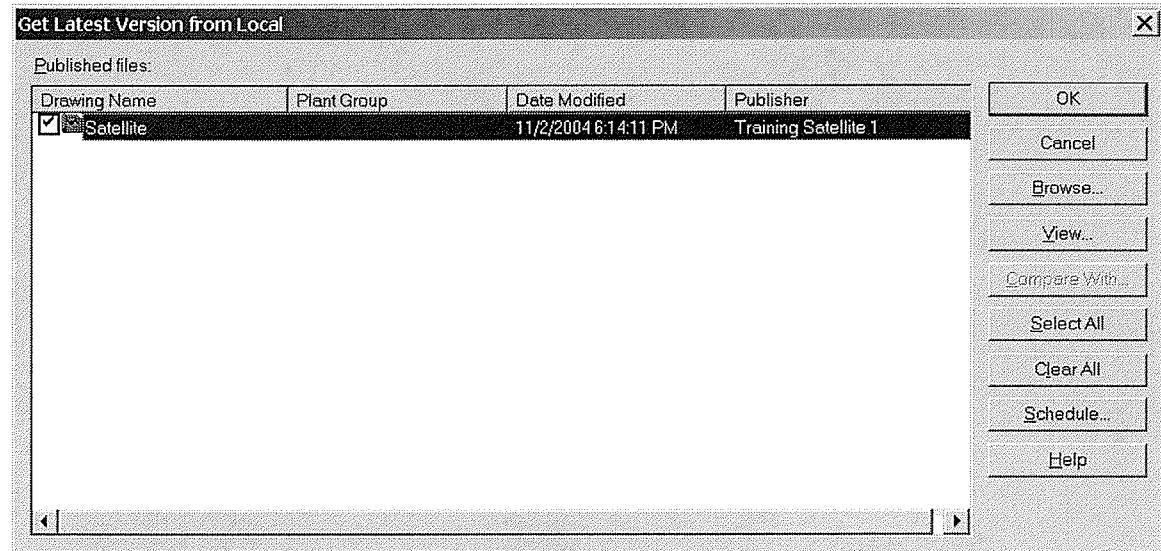


23. At the Satellite Site, a zip file will be created which needs to be sent to the Host Site, including the folder name, i.e. WsPublish



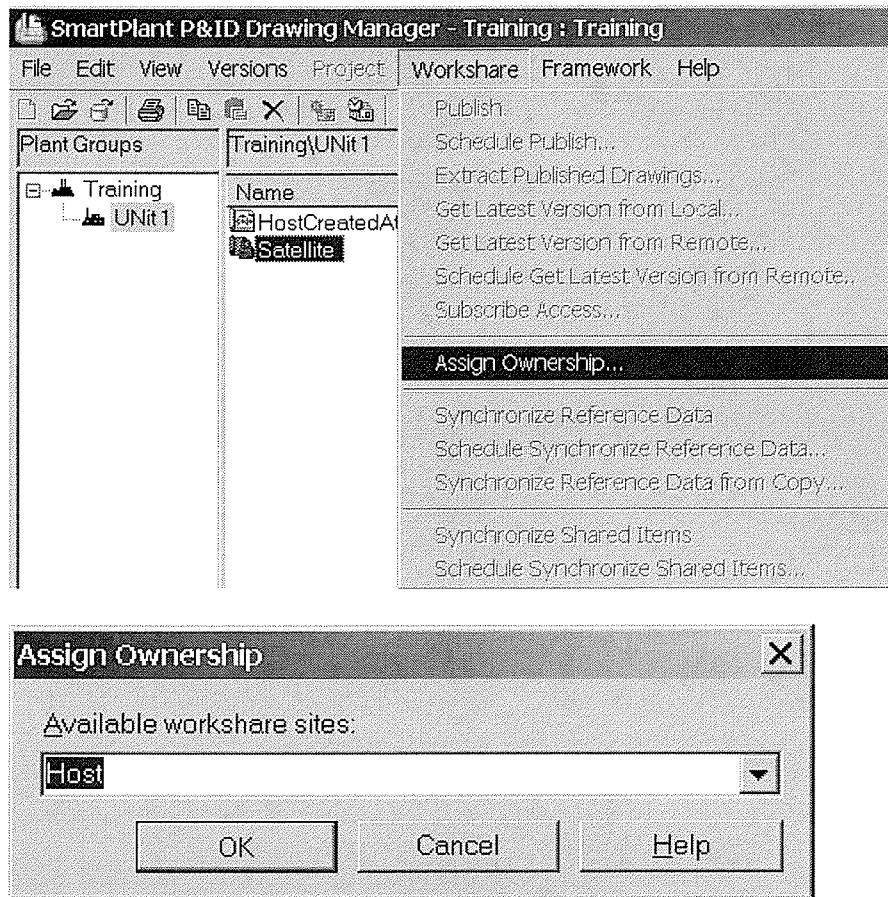
Host Receiving Drawing from a Satellite Site

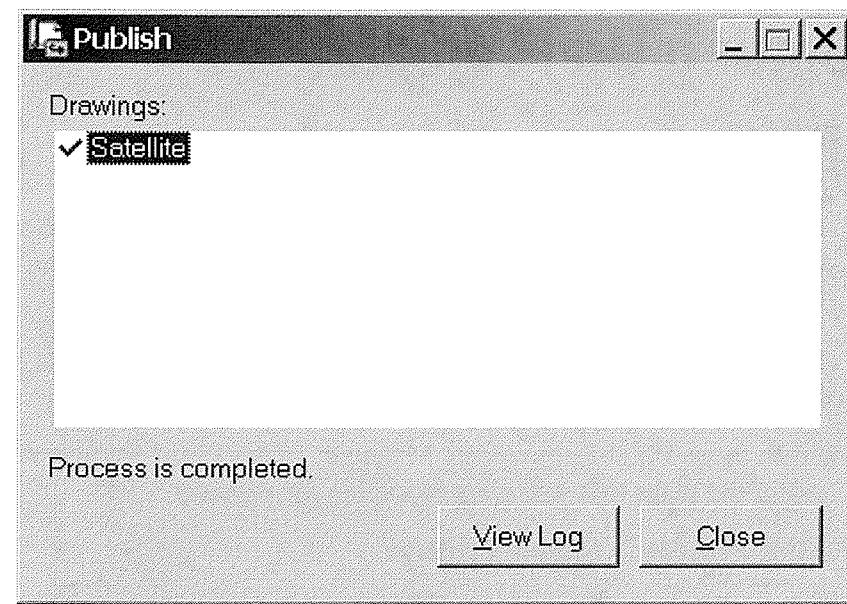
24. At the Host Site, the zip file will be stored on the file system and accessed via the Workshare > Get Latest Version from Local.....



Host Assigning Ownership to self after receiving Drawing from Satellite

25. At the Host Site, select Workshare > Assign Ownership to assign ownership of the drawing to the Host.





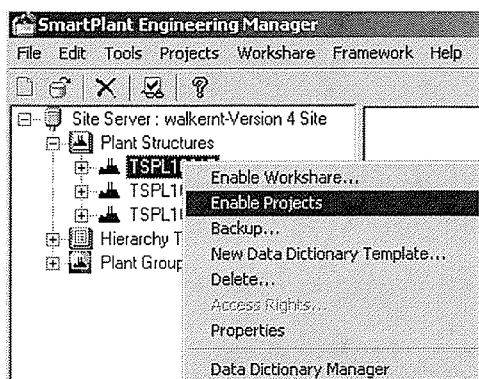
Lab 9 – Setting Up Projects

Enabling Projects

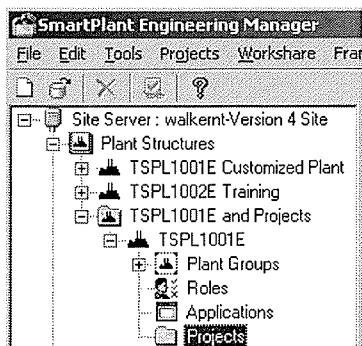
1. In order for Projects to be set up the training Plant you have been working in requires workshare to be disabled. See the Lab on Disabling Workshare before proceeding.
2. After Projects for a Plant are implemented you can workshare from the Project level.
3. From SmartPlant Engineering Manager, in the **Plant Structures** node, select the plant that you want to enable for projects.
4. Click **Projects > Enable Projects**.

OR

Right mouse click on the Plant

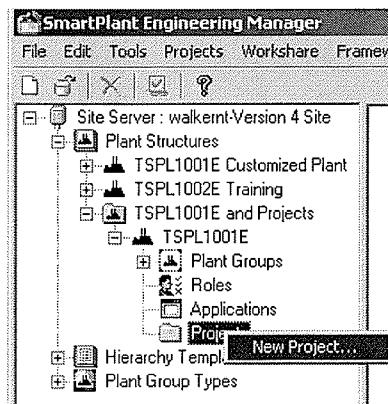


5. Notice the Project node has been added within your Plant Structure.



Create Project

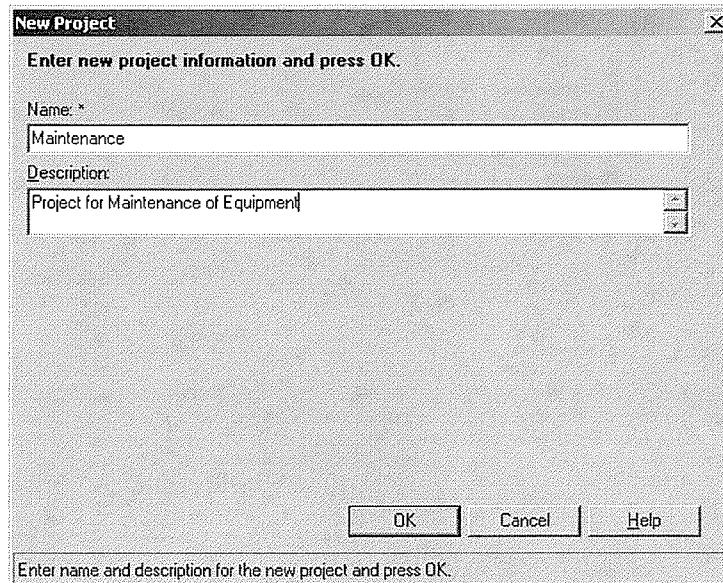
6. Set the **Claim Mode** using the **Settings** view in **SmartPlant P&ID Options Manager**.
 - a. Verify the setting is **Exclusive**
 7. Select the **Projects** node inside the **Plant Structure**.
 - a. Click **Projects > New Project**.
- OR**
- b. Right mouse click on the **Projects** node.



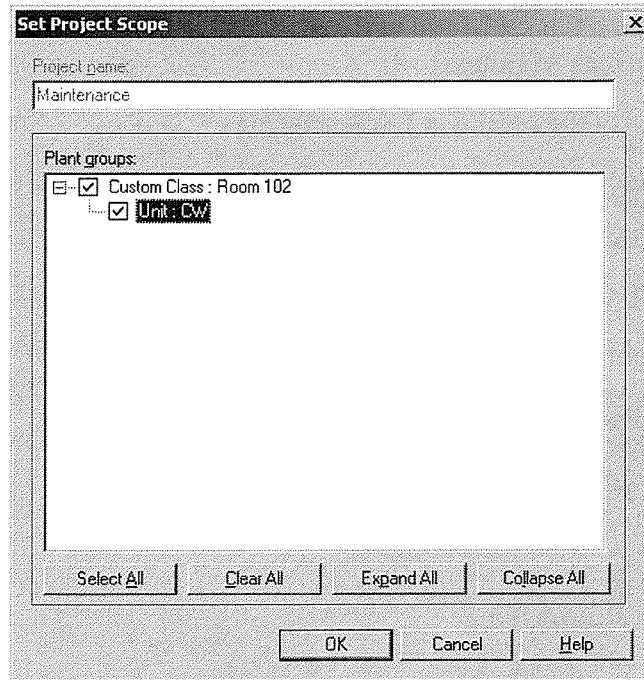
8. Type a name for the project, and enter a project description.

Important

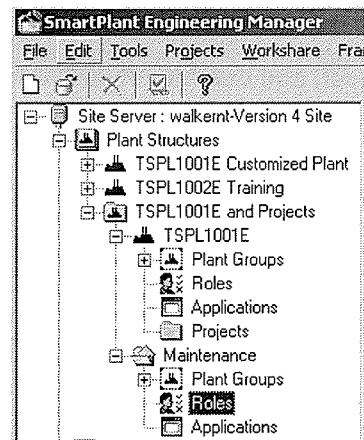
- Project names must be unique across all plants and projects in the site.



9. On the Set Project Scope dialog box, select the plant groups in the Plant to which you want the new project to have access.



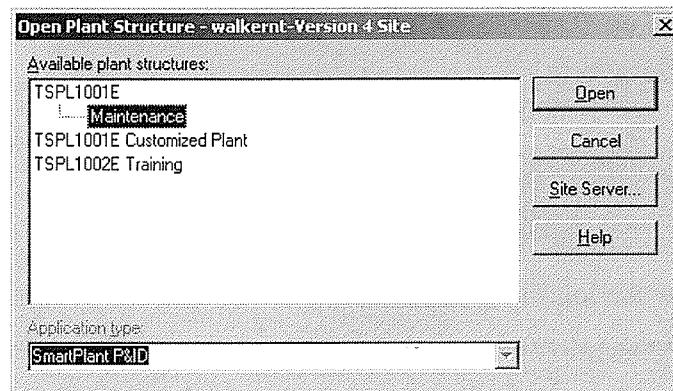
10. Assign user access rights to the project.



Lab 10 –Working in the Project

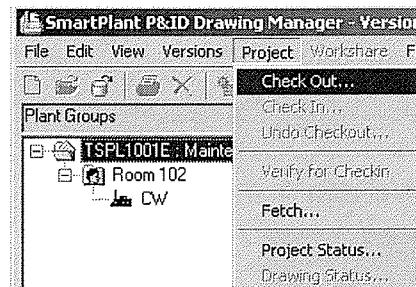
Check Out a Drawing from the Plant to the Project

1. From Drawing Manager connect to the Maintenance Project.
2. Select **File > Open Database**
3. Select the **Maintenance** project
4. Select **Open**

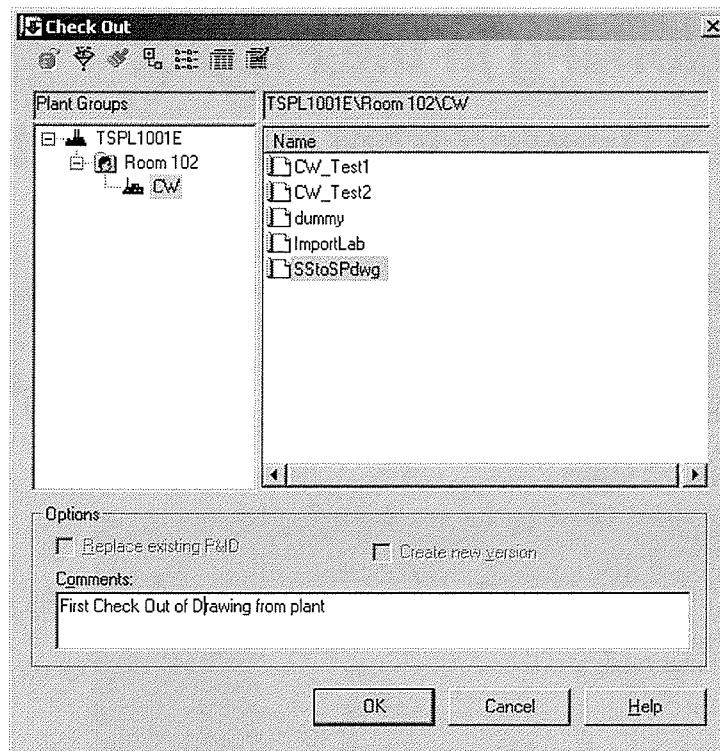


5. Check out Drawing SStoSPdwg.

1. Select the **Project**.
2. Select **Project > Check Out**



6. Select the Plant Group the Drawing belongs to and select the Drawing to check out.
7. Enter comments into the **Comments:** field
8. Select **OK**.



9. View the log file to determine if Check Out was successful.

***** CheckOUT *****

06/09/2004 10:03:11 - INGRPPO\mawalker Performed CheckOUT.

Operation : CheckOUT

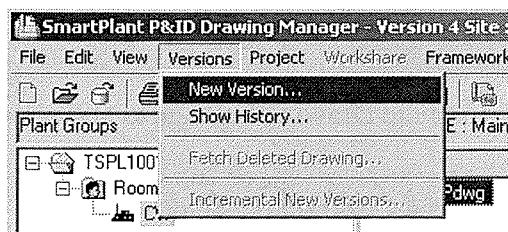
Drawing : SStoSPdwg

Status : Completed successfully.

10. Create a New Version of the Drawing.

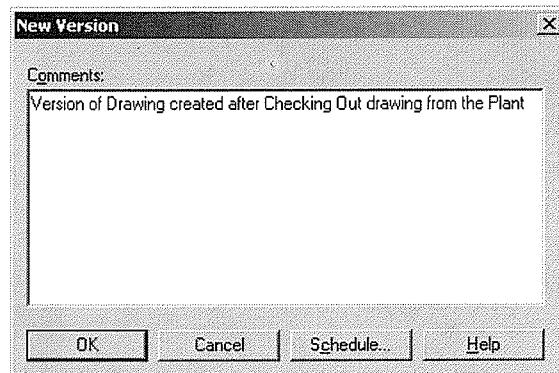
a. Select Drawing

b. Select **Versions > New Version**



11. Enter comments into the **Comments:** field

12. Select **OK**



13. View the Log file.

***** NewVersion *****

06/09/2004 10:07:03 - INGRPPO\mawalker Performed NewVersion.

Operation : NewVersion

Drawing : SStoSPdwg

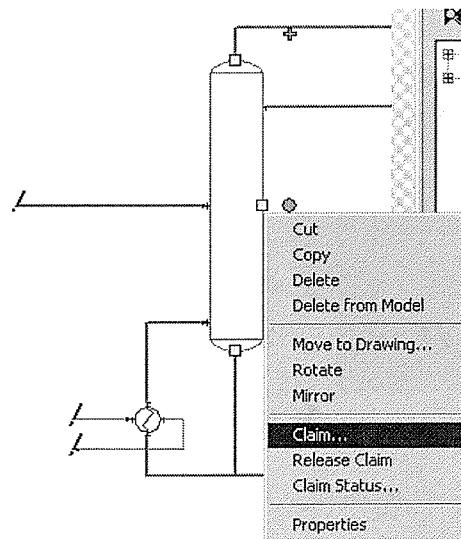
Status : Completed successfully.

14. Open Drawing SStoSPdwg.

15. Claim the Vertical Drum

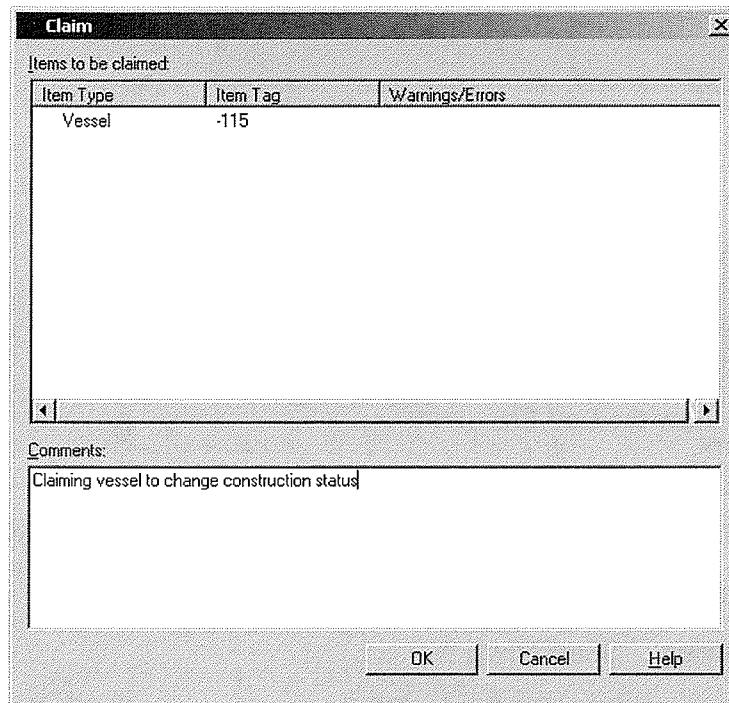
a. Select the Vertical Drum

b. Right mouse click and select **Claim**

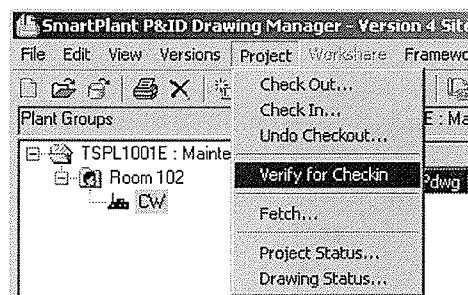


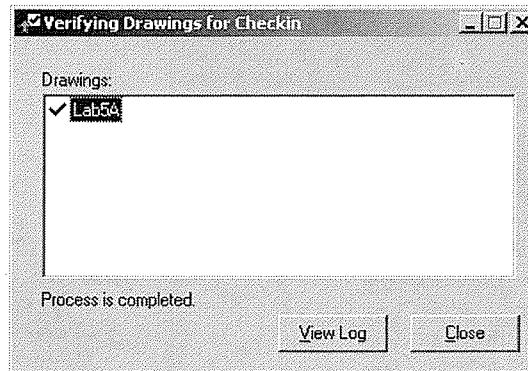
16. Input some comments.

17. Select **OK**.



18. Set the **Construction Status** property = **Existing, to be Relocated and Reused**.
19. Exit the **Drawing**.
20. Verify the drawing is ready to **Check In** to the Plant.
 - a. Select the Drawing
 - b. Select **Project > Verify for CheckIn**





21. View the **Log** file to check verification.

***** VerifyForCheckIN *****

06/09/2004 10:14:24 - INGRPPO\mawalker Performed
VerifyForCheckIN.

Operation : VerifyForCheckIN

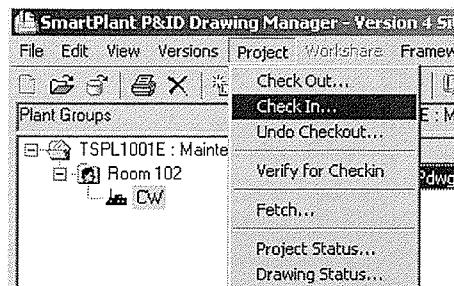
Drawing : SStoSPdwg

Status : Completed successfully.

22. Compare and Check In the drawing to the Plant.

a. Select the Drawing

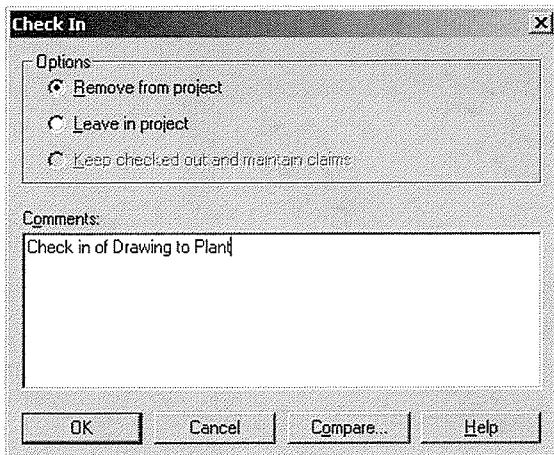
b. Select Project > **Check In**



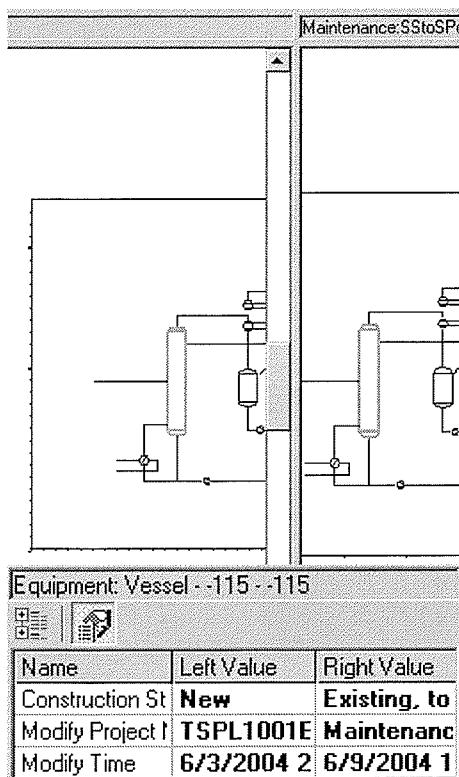
23. Set the option to **Remove from project**.

24. Add comments to the **Comment:** section

25. Select the **Compare** button from the bottom of the Check In form.



26. Select the entry in the **Change Details**, notice the information in the **Property Window**.



27. X the **Compare** form.

- Check In the Drawing**
- View the Log file**

***** CheckIN *****

06/09/2004 10:22:33 - INGRPO\mawalker Performed CheckIN.

Operation : CheckIN(Group)

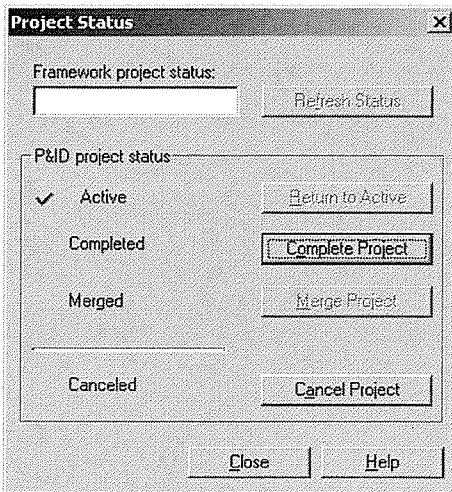
Drawings : SStoSPdwg

Status : Completed successfully.

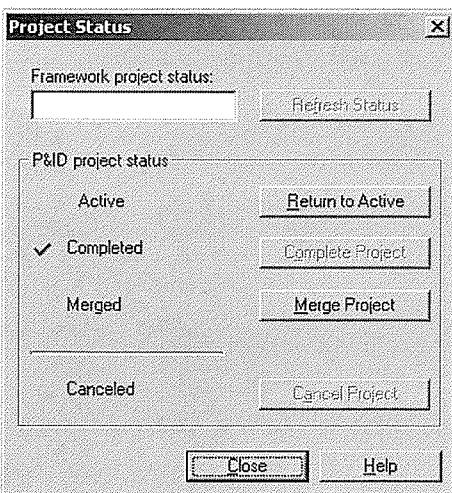
28. Immediately create a **New Version** of this drawing.

Lab 11 – Disabling a Project

1. In Drawing Manager, select the Plant
2. Select Project > Project Status
- a. Select Complete Project

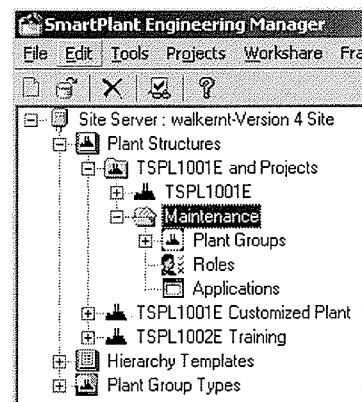


- b. Select Merge Project.

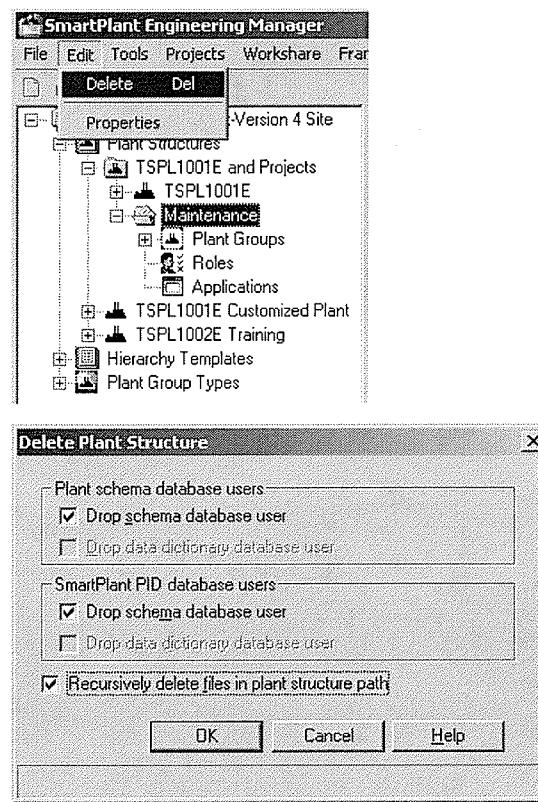


3. Exit Drawing Manager
4. Start SmartPlant Engineering Manager

5. Select the Project



6. Select the Edit > Delete



7. Select the Plant, select Projects > Disable Projects.

