Browser Module

Overview

The Browser module provides you with a wide-angle view of your instrument index data and allows you to browse through and modify it from a single location in SmartPlant Instrumentation.

The core of the Browser module is the **Browser Manager** that contains a number of predefined **browsers** categorized by data type. Each browser is associated with a particular SmartPlant Instrumentation module but in some cases, it is possible to present data from several different modules in a single browser view. In addition to the predefined browsers, you can also create two types of custom browsers – form browsers and Powersoft browsers that can be customized according to your needs. The browsers are grouped according to their category. Such a group is referred to as a browser group. For example, by defining a browser view for the **Control Valve** browser in the **Process Data & Calculation** group, you can display information for all instrument tags which have the same process function, for example, flow meters.

You access and manipulate module data and various entities by creating customized **browser views** for each of the predefined and custom browsers in the **Browser Manager**. You customize each browser view by defining its style, sorting sequence, and filter. You can define a number of different browser views for each browser to organize your data according to different requirements. Each browser view will have its own style settings, sorting sequence, and filter to present your instrument index data in the most efficient and informative manner. The browser view style settings determine which columns and entities will be displayed. The sorting sequence organizes the selected fields in a particular order and the filter lets you display the data filtered according to the condition you define.

In addition to the database fields provided to you by default, the **Browser Manager** also allows you to display custom fields, which you can use to complement data attributes not supported by the given database fields in a particular module. You can modify the names of custom fields, as you desire.

Depending on your SmartPlant Instrumentation license, you can also import browser views into SmartPlant Instrumentation. The views are available as add-ons, and once added you can use them to access the required data.

Starting the Browser Module

You can start the Browser module from any SmartPlant Instrumentation module.

Caution

- Before starting this module, check with the Domain Administrator that you have been granted appropriate access rights for the tasks you will carry out.

➢ To start the Browser Module

- Do one of the following:
  - On the main SmartPlant Instrumentation toolbar, click  .
  - On the **File** menu, click **Browser Manager**.

If you started the Browser module from the SmartPlant Instrumentation window, with no other module open, or from an open module where you do not have a default browser and a default view, the **Browser Manager** window opens.

From the **Browser Manager** window, you can:

- Add browser views
- Modify browser view profiles (styles, sort options, and filters)

If you started the Browser module from an open module where you already have a default browser and a default view, the **Browser View** window opens showing you the current default View.

From the **Browser View** window, you can:

- View the data according to the selected View settings.
- Edit the displayed data.
- Paste data from the buffer to selected rows for a batch update.
- Search the displayed data for a field name or a string.

Browser Manager

The **Browser Manager** enables you to define the settings for the **Browser View** window that displays your project data. You select your data and determine how the software displays it in the **Browser View** window.

You define your viewing settings by defining a **view** for a selected **Browser** that is associated with a particular SmartPlant Instrumentation module. Once you define and then select a view for a particular browser, the **Browser View** window displays your data according to the selected view settings. You define a view by either creating a new view or duplicating an existing one.

The first step in defining view settings is to create a browser view profile (viewing template) for a browser that you select from the **Browser Groups** list. Each browser view must be based on a view profile that is defined before any other settings can be selected. A browser view can contain style, sorting sequence, and filter settings:

- **Style** — select the fields to be displayed, define the field layout (that is, the order in which these fields will be displayed), define the field names which will be used for the current style, and set the field length (number of characters) which will be displayed for each selected field. See Browser View Style Settings for details.
- **Sort** — determine the sorting sequence of the fields in the **Browser View** window. You can also select a different sorting sequence when viewing the data in the **Browser View** window. See Browser View Sorting Sequence Settings to learn how to apply a different sorting order in the **Browser View** window.
- **Filter** — set a filtering condition that to filter the selected data rows displayed in the **Browser View** window. See View Filter Settings for details.

After you have defined all the view settings that you require, you can open the **Browser View** window where the current settings are applied to the data with which the selected browser is associated. (For more information, see Working with a Browser View.)

Browser Manager Hierarchy

You define the viewing settings for a specific browser hierarchy level as shown below (the following example is the hierarchy which is displayed in the **Browser Manager Browser Groups** data window).

The **Browser Group** hierarchy is as follows:

First Level – **Browser Group**:
Second Level – **Browser**:
Third Level – **View**:
Fourth Level – **View Settings**:

- **Browser Group** — The first level of the hierarchy stands for a **Browser Group** which represents a module or an entity (for example, Control System). Each group can contain one or more predefined **Browsers**.
- **Browser** — Each browser is associated with the relevant module data (for example, Loop and Equipment in the Instrument Index) or Entity whose data it displays. A **Browser** contains one or more viewing templates or **Views** that you can select and modify to customize the way the corresponding data will be displayed in the **Browser View** window.

Note

- You cannot add or delete any browser group or browser, nor can you change their names. You can only delete a custom browser. (See Adding New Browsers.)

- **View** — Each view contains the following viewing settings that will be used to display the data with which that view is associated: **the viewing style**, **sorting order**, and **filtering condition**. You can add, delete, modify, and duplicate the view profile to customize the way the data will be displayed in the **Browser View** window.

Selecting a Default Browser

You can define a default browser in the **Browser Manager**. This enables you to open the default browser view whenever starting SmartPlant Instrumentation with the Browser module. If other modules are open, the default browser option is disabled.

Note

- The default browser that you select must have a default view. See Adding a New View to learn how to select a default view.

➢ To select a default browser view

1. Open the **Browser Manager** and expand the required Browser Group to display its browsers.
2. Highlight the required browser view and click **Edit**.
3. Select the **Set as default view** check box.
4. Right-click the browser which you want to set as default and then, on the shortcut menu, click **Set As Default**.

Defining a View Profile

Defining a view profile is the first step in creating a browser view. A browser view profile serves as a basis for a browser view. After creating a view profile, you can define style, sort, and filter settings for the selected browser view. Once you have defined all the view settings, you can open the view and work with the available data.

➢ To define a browser view profile

1. Open the **Browser Manager** and expand the required browser group to display its browsers.

2. Select the browser to which you want to add a view and do one of the following:

   - On the **Actions** menu, click **Add View**.

   - Right-click the highlighted browser and then, on the shortcut menu, click **Add View**.

   - Click  .

3. In the **View Name** field, type the name of the new browser view that you are creating.

4. In the **View Description** field, type a brief description of the new browser view.

5. From the **Data level** list, to set the level on which the to display the data in the **Browser View** window. You can select any of the hierarchy levels that you defined for the domain, for example, Plant, Area, Unit, or the level of the domain itself.

    **Notes**

   - For an Instrument Index Standard Browser or Tag Number Browser, you can also select Typical to create a browser view profile with only typical tag and typical loop data.

   - For an Instrument Type browser, you can create a browser view profile on the domain level only.

6. Select the **Set as default** check box to make the current view the default view for the browser to which this view belongs. This way, all the settings defined for this view will be used to display the data in all the views belonging to the current browser.

7. Select the **Count per group** check box to display in the print preview and the printed view the total number of rows contained in each group delimited by the group separator in the print preview.

8. Select the **Personal view** check box to make this view available to the current user only. Other users will not be able to see this view under **Browser Groups** and therefore will not be able to open it.

9. Click **Save**.

Tip

- You can now define the required style, sort, and filter settings for the current browser view.

Adding a New View

Adding a new view to an existing browser enables you to create a customized display of your data. SmartPlant Instrumentation displays your data in the **Browser View** window according to the style, sort, and filter settings you chose.

You start by defining a view profile. Then, you define the required style, sort, and filter settings for the new view. Note that you can also duplicate an existing view and then modify some of the settings as required.

➢ To add a new view

1. Start the Browser module.
2. In the **Browser Manager**, highlight the required browser in the **Browser Groups** data window. (To understand how the browsers are organized in the **Browser Groups** data window, see Browser Manager Hierarchy.)
3. Define a view profile for the new browser view.

   Note

   - A given browser can have only one default view.

4. Define the style settings.
5. Set a sorting sequence.
6. Define a filtering condition if needed.
7. Click  to open the new browser view.

Duplicating a View

Creating several different views for the same browser can be very useful when you need to work with the same module data organized in a different manner. Duplicating an existing view within the same browser is a fast way to create a new view on the fly. After duplicating a view, you can modify it as needed.

You can duplicate the view with all its settings or only with the setting (**view**, **sort**, or **filter**) that you select.

Caution

- You can duplicate browser views only if they belong to the same browser.

➢ To duplicate an existing browser view

1. Start the Browser module.
2. In the **Browser Manager**, highlight the required browser in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)
3. Do one of the following:
   - To duplicate all the view settings, highlight the view that you want to duplicate.
   - To duplicate only a selected view setting, expand the view and select the **Style**, **Sort** or **Filter** icon as required.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Copy**.
   - Right-click the view you want to copy and then, on the shortcut menu, click **Copy**.
5. Select the target browser and do one of the following:
   - Click  .
   - On the **Actions** menu, click **Paste**.
   - Right-click the target browser and then, on the shortcut menu, click **Paste**.

Caution

- If you close the **Browser Manager**, the item you copied will be lost.

Copying a View to Another Plant

Use this procedure to copy a view from one plant to another within the same SmartPlant Instrumentation domain. When copying view settings, the software copies style, sort, and filter settings defined in the source view.

➢ To copy a view to another plant

1. In the **Browser Manager**, select a view that you want to copy to another plant.
2. Do one of the following:
   - On the shortcut menu, click **Copy to Another Plant**.
   - On the **Actions** menu, click **Copy to Another Plant**.
3. In the **Select Target Plant** dialog box, select a plant, and then click **Copy**.

Note

- If the same view name already exists in the target plant browser, the software does not overwrite the settings of the target view, but creates another view with the same name.

Modifying a View Profile

This feature enables you to modify the profile of an existing browser view. This can be necessary after duplicating a browser view.

➢ To modify a browser view profile

1. Start the Browser module.
2. In the **Browser Manager**, highlight the required browser view in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)
3. Click **Edit**.
4. Modify the current view profile settings as required.
5. Click **Save** to save the view profile with the settings you have just entered.

Deleting a View

This option allows you to delete a browser view that is no longer required. Remember that when deleting a browser view you also delete its **Style**, **Sort** and **Filter** settings.

Caution

- You can undo the **last** deletion only.

➢ To delete a browser view

1. Start the Browser module.
2. In the **Browser Manager**, highlight the required browser in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)
3. In the **Browser Groups** data window, highlight the view you want to delete.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Delete**.
   - Right-click the view you want to delete and then click **Delete** on the shortcut menu.

Looking for a Browser or View in the Browser Manager

This option enables you to find a browser or a browser view in the **Browser Manager**.

➢ To find a browser or a browser view in the Browser Manager

1. In the **Browser Manager**, do one of the following:
   - Click  .
   - On the **Actions** menu, click **Find**.
2. Select the **Browser** or **View** option button depending on what you want to find.
3. In the data field, type the value you want to find.
4. To match the retrieved values with the value you are searching for, do one of the following:
   - Select **Whole Value** to find only occurrences that are whole words (this is the default selection).
   - Select **String** to find occurrences that are either whole words or part of a word.
5. Click **Find** to find the next occurrence:
   - During the search, the **Find** button changes to **Stop**, allowing you to stop the search, if required.
   - When an appropriate occurrence is found, the corresponding row is automatically selected.
6. Click **Close** when done.

Available Browsers

The following table lists all the available browsers and their descriptions.

Browser Group	Browser	Browser Description
Instrument Index	Calibration Results Browser	Displays instruments and their attributes that include instrument calibration results. After filtering the fields, create a calibration result analysis for a certain period, an instrument calibration list, and so forth.
	Calibration Settings Browser	Displays calibration settings (ranges, set points, alarm points, and so forth) for a selected instruments.
	Circuit Related Electrical Tag Browser	Displays data for tag numbers derived from SmartPlant Electrical signals for circuits. If a circuit relates to more than one electrical item, a separate data row appears for each item.
	DDP and Index Browser	Displays instruments and their associated dimensional data for piping.
	Drawing Summary Browser	Allows you to generate a drawing list for selected instruments. A drawing list may include specifications, process data sheets, loop and hook-up drawings.
	Electrical Power Element Browser	Displays electrical properties owned by SmartPlant Instrumentation and SmartPlant Electrical for instruments and cabinets.
	Electrical Tag Browser	Displays data for all tag numbers derived from SmartPlant Electrical signals for all items but does not retrieve data values of associated attributes for signals created under circuits. The software displays data for the main item and also associated circuit data.
	Equipment Browser	Process equipment list for the current plant, area, or unit.
	Fieldbus Tag Number List Browser	Displays fieldbus instruments and their associated segments. You can create browser views to be used in the **Segment Manager** to associate tags with segments.
	Function Requirement Browser	Displays existing function requirement tag numbers and their properties. The browser allows you to view and edit the data.
	Instrument Connection Pre-assignment Browser	Allows you to pre-assign specific panels to selected device panels. This pre-assignment facilitates faster and more efficient wiring design. The purpose of this pre-assignment is to enable you to define an AutoWiring task for the pre-assigned panels as well as providing a criterion by which to filter the cables so that only pre-assigned device cables are displayed for connection with panels.
	Instrument Connection Pre-assignment (Advanced) Browser	In addition to the options available for the Instrument Connection Pre-assignment Browser, you can also display the Control System Tag data in the browser view.

Browser Group	Browser	Browser Description
	Instrument Index Standard Browser	Allows you to display and edit tag numbers from the Instrument Index module.
	Instrument Type Browser	Displays a list of instrument types and their default profiles. This browser is especially useful when you need to define a default profile for numerous instrument types at the start of a project design.
	JB – Index Browser	Displays existing field devices and their connections to junction boxes and terminals. Note that you can view only those field devices that are connected to the junction box whose wiring is continued from the other side of the terminal.
	Line Browser	Lists existing lines and their properties (except for process data), and allows you to edit the properties.
	Loop Browser	Lists existing loop numbers and their properties, and allows you to edit the properties. This browser does not show associated tag numbers.
	Maintenance Schedule Browser	Lists existing instruments for which work requests or repair forms have been issued. Also, displays the instruments for which preventive maintenance has been scheduled.
	Range Browser	Displays the following range values: calibration range, process data range, alarm and trip settings.
	Tag Category Browser	Displays existing instrument tag numbers that have been associated with a tag category.
	Tag Number Browser	Lists existing instrument tag numbers and their properties, and allows you to edit the properties.
Process Data and Calculation	Analyzer Browser	Lists the existing analyzers, and allows you to edit the associated data. You can also include custom fields.
	Control Valve Browser	Lists the existing control valves for process and calculation data, and allows you to edit the control valve properties. You can also include custom fields.
	Flow Instrument Browser	Lists the existing flow instruments for process and calculation data, and allows you to edit the flow instrument properties. You can also include custom fields.
	General Process Data Browser	Lists all the General Process Data field records, tag number custom field data, as well as specification and process data custom field information.
	Level Instrument Browser	Lists the existing level instruments for process data, and allows you to edit the level instrument properties. You can also include custom fields.
	Line Component Browser	Lists existing line measuring components for analyzers and allows you to edit the components.
	Line Process Data Browser	Lists the line data for process data and calculation, and allows you to edit the line data. You can also include line custom field data.

Browser Group	Browser	Browser Description
	Pressure Instrument Browser	Lists the existing pressure instruments for process data, and allows you to edit the pressure instrument properties. You can also include custom fields.
	Relief Valve Browser	Lists the existing relief valves for process data and calculation, and allows you to edit the relief valve properties. You can also include custom fields.
	Temperature Instrument Browser	Lists the existing temperature instruments for process data and calculation, and allows you to edit the temperature instrument properties. You can also include custom fields.
Instrument Specifications	Specifications Browser	Lists specifications and allows you to edit them. You can also include drawing custom field data.
Wiring	Auto-Wiring Routing Task Browser	Allows you to define and execute auto-wiring tasks for selected junction boxes and control system panels.
	Cable Browser	Lists all the available cables and their attributes.
	Cable Set Browser	Displays all the cable sets in the existing cables and allows you to edit the cable sets. Only the cable set data can be edited.
	Device Panel Browser	Displays field devices and their connections
	General Panel Browser	Displays existing panel data and allows you to edit the data.
	I/O Card Browser	Displays I/O card data and allows you to edit the data. This browser also includes I/O card custom fields.
	I/O Terminal Browser	Displays I/O terminal data and allows you to edit the data. You can also view the panels and I/O cards to which the terminals belong.
	Local Signal Browser	Displays the existing local signals.
	Rack Browser	Displays the existing hardware racks and allows you to edit them.
	Slot Browser	Displays existing slot data and allows you to edit the data
	Strip Browser	Displays all the existing terminals and allows you to edit them. You can also view the appropriate strips and panels.
	Telecom Channel Data Browser	Displays channel data for telecom objects and allows you to edit the data.
	Terminal Browser	Displays the existing terminals and allows you to edit them.
	Terminal Connection Browser	Displays terminal connection data. The data includes the connection on both sides of the terminals.
	Wire Browser	Displays wire data and also displays the cable sets and cables to which the wires belong. You can edit the wire data as you require.

Browser Group	Browser	Browser Description
	Wire Connection Browser	Displays wire connection data. The data includes the connection on both sides of the wires.
	Wiring Equipment Browser	Displays existing wiring equipment data and allows you to edit the data
Hook-Ups	Hook-Up Browser	Display and edit the existing hook-up types, and the associated hook-ups.
	Item List Browser	Lists all the items from the Hook-Up Library.
Loop Drawings	Block Browser	Displays all the existing blocks and allows you to edit them. Display the loop and tag numbers to which the blocks belong.
	Enhanced SmartLoop Browser	Displays all loop numbers that are assigned to Enhanced SmartLoop drawing layouts. You can reassign loop numbers to any available layout.
	Loop Browser	Displays all the existing loop drawings with their revisions, generation types, and SmartLoop settings (if any).
Control System	NIM General Browser	Displays all the tag numbers that have been assigned to channels and associate these tags with appropriate point types. This browser uses Honeywell-specific terminology.
	Control System Tag Browser	Display all the tag numbers that have been assigned to channels and enter custom information for the displayed tags.
	Conventional Tag Browser	Displays all the conventional tag numbers available for publishing to Delta V.
	Fieldbus Tag Browser	Displays all the fieldbus tag numbers available for publishing to Delta V.
	NIM Analog Input Browser	Displays all the tag numbers with the point type defined as NIM Analog Input. You can also set the control system tag parameters. This browser uses Honeywell-specific terminology.
	NIM Analog Output Browser	Displays all the tag numbers with the point type defined as NIM Analog Output. You can also set the control system tag parameters. This browser uses Honeywell-specific terminology.
	NIM Digital Input Browser	Displays all the tag numbers with the point type defined as NIM Digital Input. You can also set the control system tag parameters. This browser uses Honeywell-specific terminology.
	NIM Digital Output Browser	Displays all the tag numbers with the point type defined as NIM Digital Output. You can also set the control system tag parameters. This browser uses Honeywell-specific terminology.
	Publish Yokogawa CST (Conventional)	Displays Yokogawa conventional control system tags intended for publishing.
	Publish Yokogawa CST (FF)	Displays Yokogawa fieldbus control system tags intended for publishing.

Browser Group	Browser	Browser Description
Dimensional Data	Default Data Browser	Displays default dimensional data for piping and allows you to edit the data.
	Vendor Data Browser	Displays vendor dimensional data for piping and allows you to edit the data.
	Working Data Browser	Displays working dimensional data for piping and allows you to edit the data.
Construction and Commissioning	Cable Schedule Installation Index Browser	Lists all the cables for the current unit or plant where you can change the Electrical Installation Index, edit cable descriptions, and so forth.
	Cable Schedule Installation Index Changes Browser	Lists all the plant or unit cables, their attributes, installation index status and version.
	Instrument Installation Index Browser	Allows you to generate an electrical, instrument, and mechanical installation report that includes the appropriate drawing references.
	Instrument Installation Index Changes Browser	Displays electrical, instrument, and mechanical installation changes that include the installation status and version.
	Panel Termination Installation Index Browser	Displays the plant or unit device panels and their electrical index.
	Panel Termination Installation Index Changes Browser	Displays the plant or unit device panels with their electrical installation index and installation changes.
	Terminal Schedule Installation Index Browser	Displays the plant or unit termination schedule and the appropriate installation indexes.
	Terminal Schedule Installation Index Changes Browser	Shows the plant or unit termination schedule and the installation index changes.
	Wiring Schedule Installation Index Browser	Displays the plant or unit cable, cable set, and wire connections and their appropriate installation indexes.
	Wiring Schedule Installation Index Changes Browser	Displays the plant or unit cable, cable set, and wire connections and their installation index changes.
Document Binder	Spec Binder Package Browser	Allows you to generate a browser that includes tag numbers belonging to a Specification Binder package, tag number attributes, package item number, and specification data.
Documents	Drawing Browser	Allows you to generate a document list that shows the document name, type (P&ID, process data, calculation, specification, loop, or hook-up drawing), and custom field data.
	Revision Browser	Allows you to generate a document revision browser that includes all drawings in the plant hierarchy and all their revisions.

Browser Group	Browser	Browser Description
General	Changes Log Browser	Displays changes to property values for entities at the selected plant hierarchy level. This browser is only visible when the System Administrator selects the **Entity registry** check box for the domain.
	Task Browser	Displays tasks available in the To Do List (that is, tasks generated after you retrieve documents into SmartPlant Instrumentation from The Engineering Framework).
Telecom	End Point Amplifier Browser	Displays existing end point amplifier data and allows you to edit the data.
	End Point Hub Browser	Displays existing end point hub data and allows you to edit the data.
	End Point Intercom Browser	Displays existing end point intercom data and allows you to edit the data.
	End Point Miscellaneous Browser	Displays existing end point miscellaneous equipment data and allows you to edit the data.
	End Point PABX Browser	Displays existing end point PABX data and allows you to edit the data.
	Hub Cabinet Browser	Displays existing hub cabinet data and allows you to edit the data.
	Hub Equipment Browser	Displays existing hub equipment data and allows you to edit the data.
	Intercom Cabinet Browser	Displays existing intercom cabinet data and allows you to edit the data.
	Intercom Equipment Browser	Displays existing end point intercom equipment data and allows you to edit the data.
	Miscellaneous Cabinet Browser	Displays existing miscellaneous cabinet data and allows you to edit the data.
	Miscellaneous Equipment Browser	Displays existing miscellaneous equipment data and allows you to edit the data.
	PA Cabinet Browser	Displays existing PA cabinet data and allows you to edit the data.
	PABX Cabinet Browser	Displays existing PABX cabinet data and allows you to edit the data.
	Port-Data Browser	Displays existing port data and allows you to edit the data.

Assigning Pipe Specs to Instruments

You can assign pipe specs to instrument tag numbers in the Browser module or in the default view of the Instrument Index Standard Browser accessed from the Instrument Index module. You have to assign pipe specs to tag numbers if you want to use pipe-spec sub-libraries in the Hook-Ups module and assign the tag numbers to hook-ups.

Prior to assigning pipe specs to instrument tag numbers, you make pipe spec definitions in the **Pipe Specs** supporting table, which you can access either from the Instrument Index or from the Process Data module. In these modules, you can also assign pipe specs to line numbers.

➢ To assign pipe specs to instruments

1. Do one of the following:

   - Start the Browser module and do the following:

     a) In the **Browser Manager**, under **Browser group**s, click Instrument Index to display a list of available browsers, and then click Instrument Index Standard Browser.

     b) Define a new view profile for this browser.

     c) When defining style setting for the view, select the Tag Number and Pipe Spec fields.

   - Start the Instrument Index module and do the following:

     a) On the toolbar, click  .

     b) On the **Browse View – Default View** window, click  to open the **Browser Manager**.

     c) Under Instrument Index Standard Browser, select Default View and then add the Pipe Spec field to the default view.

 **Note**

- For more information on how to create view styles, see Creating View Styles.

2. On the **Browser Manager** toolbar, click  to open the **Browser View** window.

3. For each tag number, select a desired pipe spec from the list in the **Pipe Spec** column.

 **Tip**

- After you assign tags to hook-ups in the Hook-Ups module, you can open a view for the Hook-Up Tag List browser. This browser displays only those tags that are associated with hook-ups. In this browser view, you can also change the pipe spec associations as you require.

View Style Settings

Browser View Style Settings

You define style settings as part of the browser view customization.

Style options allow you to display or define the style settings for a browser view that you select in the **Browser Groups** pane. SmartPlant Instrumentation then uses these style settings to display your data associated with the current browser.

Style settings include the following options:

- Determining which fields the software displays in the **Browser View** window
- Setting the order and width of the selected fields and determining how they appear in the **Browser View** window.
- Customizing the layout of a browser view for printing.
- Printing out the style setting data.

Displaying Current Style Settings

You use this option to display the current style settings of the browser view that you select from the **Browser Groups** list in the **Browser Manager**. Note that if you have not yet defined a view profile for a selected browser, no style settings are available.

➢ To display the current style settings of a selected browser view

1. Start the Browser module.
2. In the **Browser Manager**, expand the required browser to navigate to the browser view in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)
3. Expand the required browser view in the **Browser Groups** data window and do one of the following:
   - In the **Browser Groups** data window, click the **Style** icon  .
   - In the upper-right data window, double-click the **Style** icon  .

The fields currently used in the selected style are listed in the right pane (entitled **Style Field List**) and the current style settings of the selected view are displayed in the lower pane.

You can now modify the display settings or print them out as needed.

Creating View Styles

You use this option to create new style settings for a selected browser view.

➢ **To create new view style settings**

1. Start the Browser module.
2. In the **Browser Manager**, add a new view profile or edit an existing one.
3. Do one of the following:
   - In the **Browser Groups** data window, click the **Style** icon .
   - In the upper-right data window, double-click the **Style** icon .
4. Click **Edit**.
5. In the **Name** data field, type the new style name (defaults to Style followed by a number).
6. Select the **Enable in explorer windows** check box to make the current browser view available in the **Domain Explorer**, **Reference Explorer**, and all the other explorer windows in SmartPlant Instrumentation. After selecting this check box and saving the style settings, the current browser view becomes available in the **Show Browser** dialog box that you open from an explorer window.
7. Do one of the following to select the fields to be displayed in the browser view:
   - Select the appropriate **View** check boxes by scrolling down the **Style settings** data window and selecting the required fields individually.
   - Select the **All** check box in the **Select** group box to select all the available fields.
   - Select the **Custom** check box in the **Select** group box to select all the custom fields.
   - Select the **Non-custom** check box in the **Select** group box to select all the fields that are not custom fields.

Note

- Note that the primary value field is always selected, and a check mark (‘✓‘) appears in its **View** check box by default.

8. Click the **Field Name** box to customize the field name.

Tips

- Field names that you customize appear in the browser view column headers when using the current style to view the data. You can customize any field name, including custom field names.

- In addition to the database fields provided to you by default, the **Browser Manager** also provides you with custom fields, which you can use to complement data attributes. A user with Domain Administrator rights can make default custom field definitions in the Administration module.

9. Click in the **Length** data field to edit the field's maximum number of characters displayed in the **Browser View** when using the current style to view the data.

10. If you want to display in the **Browser View** print preview or print out the sum or average value of any numeric field, select its **Sum** and/or **Avg.** check box. For non-numeric fields, the **Sum** and **Avg.** check boxes are disabled.

11. To set the sorting options, do one of the following:

- Click on any header (**Field Name**, **Database Field Name**, **Length**, **View**, **Sum**, or **Avg.**) to sort the fields that appear in the **Style settings** section in an ascending order (click again on the same header to sort the displayed fields in a descending order.)

- Select the **Default Sort** check box when available to revert to the default sorting order (the way the fields are arranged in the database).

Note

- The **Default Sort** option is available only if you changed the sort order by clicking on any header in the **Style settings** screen section.

12. To set the width and sequence of the selected fields, do the following:

a) Click **Customize** to open the **Customize Field Layout** dialog box.

b) To change the field sequence, drag the header of the field that you want to move to the left or to the right, then release the mouse button to drop the column in the new location.

c) To resize the column width, point to the right or left edge of the column you want to resize so that the mouse pointer changes its shape to a double-headed arrow. Drag the column edge either to the left or to the right until the column matches the required width.

13. Click **OK** to close the **Customize Field Layout** dialog box and save the changes that you made to the field layout and the style settings.

Tip

- Clicking **OK** saves the new field layout and the changes you made to the style settings in the **Browser Manager**. Therefore, when you return to the **Browser Manager** the **Save** button automatically changes to **Edit**.

14. Do one of the following:

- Click **Edit** again to continue making the required modifications.
- Click **Save** to save the new style settings.

Note

- In the **Style settings** data window, red is used to symbolize a selected field. Yellow is used to symbolize a read-only field which cannot be accessed in the browser for data editing. You can set a different color for the read-only fields if you like.

Modifying Style Settings

This option enables you to modify existing style settings for a selected browser view.

➢ **To modify the style settings for a selected browser view**

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Click **Edit**.
4. In the **Name** data field, type the new style name (defaults to Style followed by a number).
5. Do one of the following to select the fields to be displayed in the **Browser View**:
   - Select the appropriate **View** check boxes by scrolling down the **Style settings** data window and selecting the required fields individually.
   - Select the **All** check box in the **Select** group box to select all the available fields.
   - Select the **Custom** check box in the **Select** group box to select all the custom fields.
   - Select the **Non-custom** check box in the **Select** group box to select all the fields that are not custom fields.

   Note

   - Note that at least one of the displayed fields is always selected, and a check mark (‘✓‘) appears in its **View** check box by default.
6. Click in the **Field Name** data field to edit the field name which will be used as the **Browser View** column headers when using the current style to view the data.
7. Click in the **Length** data field to edit the field’s maximum number of characters displayed in the **Browser View** when using the current style to view the data.
8. If you want to display in the **Browser View** print preview or print out the sum or average value of any numeric field, select its **Sum** and/or **Avg.** check box. For non-numeric fields, the **Sum** and **Avg.** check boxes are disabled.

9. To set the sorting options, do one of the following:

   - Click on any header (**Field Name**, **Database Field Name**, **Length**, **View**, **Sum**, or **Avg.**) to sort the fields that appear in the **Style settings** section in an ascending order (click again on the same header to sort the displayed fields in a descending order.)

   - Select the **Default Sort** check box when available to revert to the default sorting order (the way the fields are arranged in the database).

   Note

   - The **Default Sort** option is available only if you changed the sort order by clicking on any header in the **Style settings** screen section.

10. To set the width and sequence of the selected fields, do the following:

    a) Click **Customize** to open the **Customize Field Layout** dialog box.

    b) To change the field sequence, drag the header of the field that you want to move to the left or to the right, then release the mouse button to drop the column in the new location.

    c) To resize the column width, point to the right or left edge of the column you want to resize so that the mouse pointer changes its shape to a double-headed arrow. Drag the column edge either to the left or to the right until the column matches the required width.

11. Click **OK** to close the **Customize Field Layout** dialog box and save the changes that you made to the field layout and the style settings.

    Tip

    - Clicking **OK** now will save the new field layout and the changes you made to the style settings in the **Browser Manager**. Therefore, when you return to the **Browser Manager** the **Save** will automatically change to **Edit**.

12. Do one of the following:

    - Click **Edit** again to continue making the required modifications.

    - Click **Save** to save the new style settings.

    Note

    - In the **Style settings** data window, red is used to symbolize a selected field. Yellow is used to symbolize a read-only field which cannot be accessed in the browser for data editing. You can set a different color for the read-only fields if you like.

Structuring the Print Layout

This option enables you to structure the layout of the data when printing out the data displayed in a customized **Browser View** window. You can select the fields that you want to be displayed in the print preview and the printout as well as do the following:

- Sequence the columns.
- Set the column width.
- Define the number of fields per column: a single field per column or multiple (no more than five) fields per column.
- Set the text and header font size.
- Set the header height.

➢ To customize the layout

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Click **Edit**.
4. Click **Layout** to open the **Layout** dialog box.
5. Select a field from the **Column Header** pop-up window and drag it to the field where you want it to appear. Your print layout can take the form of single fields in each column or multiple (no more than 5) fields in a column. Remember that the fields that you do not select from the **Column Header** pop-up window will not show up in the printout even though they exist in the current browser (= **Open View** window.)

   Caution

   - Note, however, that if you decide to display two or more fields in a column, the printed out report will not display the **Group Row Count**, nor will it show the sum and/or average field values even if you have selected these options.

6. Click **Font** to open the **Select Font Size** dialog box where you customize the column and header font size as well as the column and the header height.

7. Set the font sizes as required using the spinners:

    a) Use the **Column Font Size** spinner to define the font size.

    b) Use the **Column Height** spinner to define the column height. Note that if you do not define the column height before generating the layout, the **Layout** dialog box does not display any data.

    c) Use the **Header Font Size** spinner to define the header font size.

    d) Use the **Header Height** spinner to define header height size.

8. Click **OK** to accept your settings and return to the **Layout** dialog box.

9. Click **Generate** to open the **Generate Layout** dialog box where you customize the column sequence and size.

10. Set the layout structure as follows:

    a) Set the column sequence by dragging the column header to the required position.

    b) Set the column size by dragging the edge of the column either to left or to the right.

    c) Click **OK** to accept the settings and return to the **Layout** dialog box.

11. Click **Save** to save all the settings and close to the **Layout** dialog box.

Clearing a Layout Structure

This option allows you to clear the existing print preview layout structure defined for the current browser view without clearing all the style settings for this browser view.

➢ To clear an existing layout structure

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Click **Edit**.
4. Click **Layout**.
5. In the **Layout** dialog box, click **Clear**.
6. Click **Save**.

Duplicating View Styles

This option enables you to copy view style settings to another **existing** browser view. Note that this action overwrites the target style settings with the duplicated style settings.

➢ To duplicate existing style settings

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Select the style that you want to duplicate.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Copy**.
   - Right-click the highlighted style in the **Browser Groups** data window and then, on the shortcut menu, click **Copy**.
5. Navigate to the target style whose settings you want to replace with ones you copied.
6. Highlight the selected target style.

    **Caution**

   - If you close the **Browser Manager** at this stage, you cannot paste the duplicated style settings.

7. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Paste**.
   - Right-click the target style in the **Browser Groups** data window and then, on the shortcut menu, click **Paste**.

Clearing View Style Settings

This option allows you to clear all the style settings for a selected browser view.

➢ **To clear all the style settings of a selected browser view**

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Click **Edit**.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Delete**.

Printing Style Setting Data

This option enables you to print out all the data that appears in the **Style settings** data window. You can print out the data for all the fields or just for the ones you have selected to view.

➢ **To print out the style settings data**

1. Start the Browser module.
2. In the **Browser Manager**, display the style settings you want to modify.
3. Click **Print** to open the **Print Preview** window:
4. In the **Show Fields** group box, do one of the following:
   - Select **All** to display and print out all the data for all the fields appearing in the **Style settings** screen section.
   - Select **Selected** to display and print out the data for only those fields that you selected to be viewed.
5. Perform any of the following actions as required:
   - Click **Zoom** to select your preview magnification level.
   - Click **Save As** to save the data as an external file.
   - Click **Print** to start printing.

View Sort Settings

Browser View Sorting Sequence Settings

A browser view sorting sequence determines the sequence in which the selected rows are displayed in the **Browser View** window. In addition to defining a sorting sequence for the **Browser View** window, you also determine whether the displayed rows will be sorted in an ascending or descending order. Note that you will also be able to sort the selected fields in the **Browser View** window that will override your sort sequence settings.

You can perform the following activities:

- Create and modify a view sorting sequence.
- Duplicate a view sorting sequence.
- Clear the existing view sorting sequence settings.

Displaying the Current Sorting Sequence

This option enables you to display the current sorting sequence for an existing browser view that you select from the **Browser Groups** list in the **Browser Manager**. Note that if you have not yet defined a view profile for a selected browser, no sorting sequence will be available.

➢ To display the current sorting sequence of a selected browser view

1. Start the Browser module.
2. In the **Browser Manager**, expand the required browser to navigate to the browser view in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)
3. Expand the required browser view in the **Browser Groups** data window and do one of the following:
   - In the **Browser Groups** data window, click the **Sort** icon  .
   - In the upper-right data window, double-click the **Sort** icon  .

    **Tip**

   - The fields currently selected for the sorting sequence are listed in the right data window (entitled **Sort Field List**) and the current sorting sequence of the selected view is displayed in the lower data window. You can now modify the sorting sequence as needed.

Creating a View Sorting Sequence

This option enables you to create a new sorting sequence for a selected browser view.

➢ To create a view sorting sequence

1. Start the Browser module.
2. In the **Browser Manager**, add a new view profile or edit an existing one.
3. Do one of the following:
   - In the **Browser Groups** data window, click the **Sort** icon .
   - In the upper-right data window, double-click the **Sort** icon .
4. Click **Edit**.
5. In the **Name** box, type the required sorting sequence name (defaults to Sort followed by a number).
6. Under **Field Name**, from the list of database fields, select a field according to which you want to sort data in the browser view that you can open for this browser.

   Tips

   - For any browser view that supports sorting data by tag numbers, you can sort tag numbers according to the numeric segment. From the **Field Name** list, select Tag Trans Name, and define the sort sequence in the **Start Char** and **Length** fields.
   - For any browser view that supports sorting data by loop numbers, you can sort loop numbers according to the numeric segment. From the **Field Name** list, select Loop Trans Name, and define the sort sequence in the **Start Char** and **Length** fields.

7. In the **Start Char.** data field, type the starting position of the current segment, i.e., the selected sorting field leftmost character.
8. In the **Length** data field, type the total number of characters (from the starting character) the selected sorting field will contain.

9. Do one of the following:

   - Under **Order**, select **Ascending** to cause the field displayed in the **Browser View** window to be sorted in an ascending order (this is the default selection.)

   - Under **Order**, clear **Ascending** to cause the field displayed in the **Browser View** window to be sorted in a descending order.

10. Click **Insert** to insert a sorting field before the one currently selected in the **Sort settings** group box.

11. Click **Delete** to remove the currently selected field from the sorting sequence.

12. To resize and re-sequence the fields currently displayed in the **Sort settings** group box, do the following:

    a) Drag and drop a field to a new position to change the field sequence.

    b) To change the width of a field, position the cursor on the border between two fields and then drag the order to the right or to the left.

13. Click **Save** to save the new sorting sequence.

Tip

- The **Sort Field List** data window displays the sorting sequence you have created.

Modifying a View Sorting Sequence

This option enables you to modify an existing view sorting sequence.

➢ **To modify an existing view sorting sequence**

1. Start the Browser module.
2. Display the sorting sequence that you want to modify.
3. Click **Edit**.
4. In the **Name** data field, type the required sorting sequence name (defaults to Sort followed by a number).
5. From the **Field Name** box, select the field by which to sort the data from the list.

   Note

   - The **Field Name** list contains all the fields that are used for the data that the current browser is associated with.

6. In the **Start Char.** data field, type the starting position of the current segment, that is, the selected sorting field leftmost character.
7. In the **Length** data field, type the total number of characters (from the starting character) the selected sorting field will contain.
8. Do one of the following:

   - Under **Order**, select **Ascending** to cause the field displayed in the **Browser View** window to be sorted in an ascending order (this is the default selection.)
   - Under **Order**, clear **Ascending** to cause the field displayed in the **Browser View** window to be sorted in a descending order.

9. Click **Insert** to insert a sorting field before the one currently selected in the **Sort settings** group box.
10. Click **Delete** to remove the currently selected field from the sorting sequence.

11. To resize and re-sequence the fields currently displayed in the **Sort settings** group box, do the following:

    a) Drag and drop a field to a new position to change the field sequence.

    b) To change the width of a field, position the cursor on the border between two fields and then drag the order to the right or to the left.

12. Click **Save** to save the new sorting sequence.

Tip

- The **Sort Field List** data window displays the sorting sequence you have created.

Duplicating a View Sorting Sequence

This option enables you to copy an existing sorting sequence to another **existing** browser view. Note that this action overwrites the target sorting sequence with the duplicated style settings.

➢ To duplicate an existing sorting sequence

1. Start the Browser module.
2. Display the sorting sequence that you want to duplicate.
3. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Copy**.
4. Navigate to the target sorting sequence whose settings you want to replace with ones you copied.
5. Highlight the selected target sorting sequence.

    **Caution**

   - If you close the **Browser Manager** at this stage, you will not be able to paste the duplicated sorting sequence.
6. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Paste**.

Clearing View Sorting Sequence Settings

This option allows you to remove an existing sorting sequence.

➢ To clear sorting sequence settings

1. Start the Browser module.
2. Display the sorting sequence that you want to clear.
3. Click **Edit**.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Delete**.

View Filter Settings

This option enables you to define a filtering condition which will be used to filter the data associated with the selected browser view.

You can use any of the following parameters in the filter:

- field names
- operators and functions (see the table below)
- logical expressions: **Or** -or- **And**

Caution

- In the following example, the filter will be syntactically correct but logically wrong (and not detected by the system):
  I/O Type < > AI
  and
  I/O Type = AI

Keep in mind that a complex filter condition may take longer to retrieve your data. In this sense, performing an 'OR' operation is more time-consuming than performing an 'AND' operation.

The following table lists the built-in operators and functions available to you when defining the filter settings:

Operator/Function	Description	Example
=	Equal to	Manufacturer = 'Shell'
>	Greater than	Tag Number > 101
<	Less than	Process Function Name < 'P'
>=	Greater or equal to	Velocity >= 10
=<	Less than or equal to	Low Alarm =< 30
<>	Not equal to	Loop Prefix <> 'AA'
BETWEEN	Select an alphanumeric value that is between the stated expression	Price between 150 and 250
LIKE [value]	Select a similar value that is similar to the one in the '[value]' field.	Tag Number LIKE '%AA%'
	You can use the following wildcard characters: % - any combination of characters. _ - any single character.	Process Function Name LIKE P__

Operator/Function	Description	Example
IS NULL	Contains an undefined value	Service IS NULL
IS NOT NULL	Not equal to NULL	Loop Number IS NOT NULL
AND	Include the following expression in the filter combination	
OR	Accept either the previous or the following expression in the filter expression	

Displaying the Current View Filter Condition

You use this option to display the current filter condition of browser view that you select from the **Browser Groups** list in the **Browser Manager**. Note that if you have not yet defined a filter condition for a selected browser, no filter settings will be available.

➢ To display the current filter condition

1. Start the Browser module.

2. In the **Browser Manager**, expand the required browser to navigate to the browser view in the **Browser Groups** data window. (See the Browser Manager Hierarchy to understand how the browsers are organized in the **Browser Groups** data window.)

3. Expand the required browser view in the **Browser Groups** data window and do one of the following:

   - In the **Browser Groups** data window, click the **Filter** icon  .
   - In the upper-right data window, double-click the **Filter** icon  .

   Tip

   - The filter condition you define is displayed in the right data window (entitled **Filter Field List**)

Defining a View Filter

This option enables you define a new filter condition for a selected browser view.

➢ To define a new filter condition

1. Start the Browser module.
2. In the **Browser Manager**, add a new view profile or edit an existing one.
3. Do one of the following:
   - In the **Browser Groups** data window, click the **Filter** icon  .
   - In the upper-right data window, double-click the **Filter** icon  .
4. Click **Edit**.
5. In the **Name** data field, type the required filter condition name (defaults to Filter followed by a number).
6. Click the **Field Name** data field and select an appropriate tag number attribute according to which you want to filter the data in the **Browser View** window.

    **Note**

   - The **Field Name** list contains all the fields that are used for the data that the current browser is associated with.

7. Click the **Operator** data field and select a suitable operator to determine how the tag number attribute selected from the **Column Name** list will relate to the expression in the **Value** field. (See View Filter Settings to learn about filter operators.)
8. In the **Value** data field, select or type a suitable value to determine how the tag number attribute selected from the **Column Name** list are specified.

9. Depending on whether you want to add another filtering condition, in the **Logical** data field, do one of the following:

   - Leave the field empty if the condition is the last one in the list.

   - Click the field and select either **And** or **Or** as the logical function from the drop-down list if the condition is to be followed by another one. Select **And** to include the following expression in the filter condition. Select **Or** to accept either the previous or the following expression in the filter condition.

10. Click **Verify** to verify the current filtering condition.

11. Perform any of the following actions as required:

    - Click **Insert** to append new a data line.

    - Click **Delete** to delete the currently selected data line.

    - Click **Save** to save the new filter settings.

    Tip

    - The **Filter Field List** data window displays the filter condition you have just defined.

Modifying a View Filter

This option enables you modify an existing filter condition for a selected browser view.

➢ **To modify an existing filter condition**

1. Start the Browser module.
2. Display the filter condition that you want to modify.
3. Click **Edit**.
4. In the **Name** data field, type the required filter condition name (defaults to Filter followed by a number).
5. Click the **Field Name** data field to select the field from the list.

   Note

   - The **Field Name** list contains all the fields that are used for the data that the current browser is associated with.

6. Click the **Operator** data field to select the required operator from the list.
7. In the **Value** data field, type the appropriate value.
8. Depending on whether you want to add another filtering condition, in the **Logical** data field, do one of the following:
   - Leave the field empty if the condition is the last one in the list.
   - Click the field and select either **And** or **Or** as the logical function from the drop-down list if the condition is to be followed by another one.
9. Click **Verify** to verify the current filtering condition.
10. Perform any of the following actions as required:
    - Click **Insert** to append a new a data line.
    - Click **Delete** to delete the currently selected data line.
    - Click **Save** to save the new filter settings.

    Tip

    - The **Filter Field List** data window displays the filter condition you have just defined.

Duplicating a View Filter

This option enables you to copy an existing filter condition to another **existing** browser view. Note that this action overwrites the target filter condition with the duplicated filter condition.

➢ To duplicate an existing filter condition

1. Start the Browser module.
2. Display the filter condition that you want to duplicate.
3. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Copy**.
4. Navigate to the target filter condition that you want to replace with ones you copied.
5. Highlight the selected target filter condition.

   Caution

   - If you close the **Browser Manager** at this stage, you will not be able to paste the duplicated filter condition.

6. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Paste**.

Clearing View Filter Settings

This option allows you to clear the filter condition for a selected browser view.

➢ **To clear the filter condition for a selected browser view**

1. Start the Browser module.
2. Display the filter condition that you want to duplicate.
3. Click **Edit**.
4. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Delete**.

Adding New Browsers

This option enables you to add new browsers to the **Browser Manager**. After these browsers are added to the **Browser Manager**, you can use them the same way you use the browsers that are supplied in the **Browser Manager** by default.

Currently, you can add two kinds of browser:

- **Form Browsers** — a browser for every form that you generate and save in the **Spec Data Dictionary**.
- **Powersoft Browsers** — a browser you create as a .psr report or a .pdb file using InfoMaker.

Adding a Form Browser

This procedure enables you to add form browsers to the Specifications browser group. The basis for a form browser is a spec form with database fields you made available using the **Field Properties** options of the **Spec Data Dictionary**. When you generate such a form in the Specifications module, take into consideration the following:

- Fields that you do not define in the **Spec Data Dictionary** are not available for a form browser.
- A form browser displays the header text that you set in the **Spec Data Dictionary**. This text can differ from the header text in the actual forms, and in the specifications based on these forms.
- You can add one form browser for each form.

➢ To add a form browser

1. Start the Browser module.
2. On the **Browser** menu, click **Form Browser** to open the **Add a Form Browser** dialog box.

   Note

   - The **Status** column displays information about the forms for which you added form browser fields in the **Spec Data Dictionary**.

     New (in red) — a form for which you have not added a form browser

     Modified (in magenta) —a form for which you added form browser fields since the last time that you added a form browser for this form.

     Unchanged (in black) —a form for which you did not add form browser fields since the last time that you added a form browser for this form.

3. Select the specification forms for which you want to add browsers to the **Specifications** browser group.
4. Click **Add**.

Note

- You can display the **Notes** field in a view defined in the **Specifications** browser group and modify the contents one line at a time. To ensure that each new line will be visible in the specification itself, press **Ctrl** + **Enter** to add a carriage return.

Adding a Powersoft Browser

This advanced option enables you to add a browser created in InfoMaker to an existing browser group in the **Browser Manager**. This browser can be created in InfoMaker as a .psr or .pbd file. For this browser to be fully compatible with the Browser module, you must follow specific rules when creating the browser in InfoMaker. The following outlines these rules and then presents the step-by-step instructions how to add the newly created browser to the Browser module.

Caution

- Only proficient users who have advanced knowledge of the database structure should attempt this advanced feature.
- You **must** follow specific rules when creating a new browser in InfoMaker. For more information, see Creating a New Browser for SmartPlant Instrumentation.
- You cannot perform report comparison for Powersoft browsers.

➢ To add a new Powersoft browser to the Browser Manager

1. Start the Browser module.
2. On the **Browser** menu, click **Powersoft Browser**.
3. Beside **File name**, click **Browse** and do one of the following:
4. Do one of the following:
   - Navigate to a desired .psr file.
   - Navigate to a desired .pbd file and then, in the data window of the **Add a Powersoft Browser** dialog box, select one or more Powersoft forms belonging to the specified .pbd file.

   Tip

   - When defining settings for multiple Powersoft forms belonging to the specified .pbd file, use the **Previous** and **Next** buttons, or click **Form List** and then select a Powersoft form for which you want to define browser settings.

5. Click **OK** to open the **Powersoft Browser Settings** dialog box.
6. In the **Browser** box, type the name of the target browser.
7. In the **Description** box, type the new browser description.
8. From the **Primary table** list, select the primary table for the new browser. This list contains all the tables that you selected when creating the report in InfoMaker.
9. From the **Primary value** box, select the value for the primary key name of the new browser. For example, in the COMPONENT table, the primary value is CMPNT_NAME.
10. From the **Browser group** list, select a browser group to which you want to assign the new browser.
11. From the **Access right entity** list, select the entity for the access rights definition. For example, MODULE ACCESS – INDEX.
12. From the **Default Sort** list, select the default sort value.
13. From the **Entity for Enhanced SmartLoop macro filter** list, select an entity for Enhanced SmartLoop macro filter.

Note

- An Enhanced SmartLoop macro filter is a filter for which you define conditions for displaying macro attributes in Enhanced SmartLoop drawings. After you select an entity from this list, in the Loop Drawings module, you can set filter conditions for Enhanced SmartLoop drawings that use this browser data. For details, see Setting Filter Conditions for Entity Properties.

Tip

- If you want to work with the new browser in the Instrument Index module, select the **Define a browser for Instrument Index module** check box.

Browser Views

Working with a Browser View

A browser view is the customized presentation of your instrument index data. The data displayed in a browser view depends on the settings you selected when creating that view. Each browser view is associated with a particular browser that allows you to retrieve data pertinent to the associated SmartPlant Instrumentation module. You can create multiple browser views for the same browser to meet different requirements. Each browser view has its own style settings, filter, and sorting sequence. You can also select a default browser whose settings will be used to display data in the **Browser View** window. Default settings take effect only when you start the Browser module from one of the other modules.

Caution

- Note that all **Browser View** access rights correspond to the access rights of the appropriate module entity.

➢ **To open an existing browser view**

Do one of the following:

- Start the Browser module. This will open your default browser.
- Click  after customizing the style settings, sorting sequence and filter as needed.
- On the **Actions** menu, click **Open View**.

Now you can:

- Edit the displayed data.
- Copy and paste data using the view buffer.
- Search a column for a specific value.
- Sort the displayed rows.
- Count the displayed rows.
- Refresh the displayed data.
- Select the non-editable field indication color.
- Open the relevant module for the selected item.

Editing Data in a Browser View

This help topic explains how to edit your data in a **Browser View** window.

➢ To edit the data in the Browser View window

1. Open the required browser view.
2. Click the data field that you want to edit.
3. To edit the selected data field, use one of the following methods, as required:
   - Type the appropriate value.
   - Click to open a list and select the appropriate value.
   - Select or clear a check box.

   Notes

   - If you wish to add or delete some of the options in a list, you can access that list from the **Tables** menu in the **Instrument Index Module** window. See Supporting Tables for more information. Other options are not accessible for editing.
   - Fields that hold naming convention data (**Name**, **Prefix**, **Number**, and **Suffix**) cannot be edited. These fields are displayed in black when highlighted.

4. Do one of the following:
   - Press **Tab** to move to the next data field.
   - Press **Shift** + **Tab** to move to the previous data field.

Modifying and Saving a Field Layout in the Browser View Window

Use this procedure to modify and save a field layout for a browser style in the **Browser View** window directly, without having to structure the print layout from the **Browser Manager**.

In the **Browser View** window, prior to saving the field layout, you can modify the following layout settings:

- Column sequence
- Column width

➢ To modify and save a field layout in the Browser View window

1. In the **Browser View** window, modify the field layout as follows:
   - Place the mouse pointer over a column heading and then drag and drop the column to a desired position in the data window.
   - Place the mouse pointer on an edge of a column heading so that the pointer changes to a double-headed arrow, and then resize the column width as you require.
2. Right-click anywhere in the data window and then, on the shortcut menu, click **Save Field Layout**.

Pre-Assigning Junction Boxes to Device Panels

You use this feature to pre-assign specific junction boxes to selected tag numbers. This pre-assignment serves several purposes. You can pre-assign the required junction boxes to define an Auto-Wiring routing task (for details, see Defining and Executing Auto-Wiring Tasks). Another purpose of this pre-assignment is to enable you to connect multiple pre-assigned device cables in batch mode. You can also use this pre-assignment to filter only pre-assigned device cables for connection with junction boxes.

➢ To pre-assign a junction box to a device panel

1. Open the **Browser Manager** and expand the Instrument Index browser group.

   Tip

   - You can also click on the **Auto-Wiring Browser View** toolbar (that you open from the Wiring module) to open the **JB Pre-Assignment Browser View** window.

2. Select the JB Pre-assignment browser and add a new browser view to this browser.

   Caution

   - Make sure that you select the **Set as default view** check box if you want to use the new browser view for Auto-Wiring.

3. Click to open the new view.

4. In the **Browser View** window, highlight the required tag number to which you want to assign a junction box.

5. Click in the **Junction Box Name** field and select the appropriate junction box that will be pre-assigned to the highlighted tag number.

Note

- If a junction box has already been connected to a field device, the **Junction Box Name** field will display the junction box name and you will not be able to change that value.

6. Click in the **Strip Name** field and select the required strip in the pre-assigned junction box.

7. Repeat steps 4 through 6 for each device panel to which you want to pre-assign a junction box.

8. Edit the data in the **Browser View** window as required and close the **Browser View** window. Save the data when prompted.

Tip

- You can now select the appropriate junction boxes and perform batch connection of device cables in the **Batch Device Cable Connection** window. From the **Device Cable Manager** window that appears, you can open the **Device Cable Manager Filter** dialog box and select the **Display pre-assigned device cables only** check box. After closing the dialog box, the **Device Cable Manager** displays only the pre-assigned device cables and you can start connecting them on the fly.

Using the Browser View Buffer

You can use the **Browser View Buffer** data window to copy data from one row and update multiple rows in a batch with that data.

➢ To update a group of rows in batch mode

1. Open the required browser view.

2. Click in the appropriate field of the **Buffer** data window and type the relevant information. Press the **Tab** key to move to the next data field or press **Shift** + **Tab** to move to the previous data field.

3. To copy an entire row to the **Buffer** data window, select the appropriate row, and do one of the following:

   - Click  .
   - On the **Actions** menu, click **Copy to Buffer**.

4. To copy a field to the Windows Clipboard, select the appropriate field and then press either **Ctrl** + **Ins** or **Ctrl** + **C**.

5. In the **Browser View** window, highlight the row(s) or the field(s) that you want to update. (To select more than one row, hold down **Ctrl** and click the required rows.)

    **Caution**

   - Use the scrollbar to view all parts of the **Buffer** data window and check the data they contain before pasting data from the **Buffer** data window to the **Browser View** window.

6. To paste the data from the buffer to the currently selected row, do one of the following:

   - Click  .
   - On the **Actions** menu, click **Paste**.

    **Note**

   - Empty **Buffer** columns do not update the target fields.

7. To paste the data from the Windows Clipboard to a selected field, press either **Ctrl** + **V**.

Clearing Data from the Buffer

If you no longer need to store data in the buffer, you can clear the entire buffer or the data in the currently selected field.

➢ To clear the entire buffer

- Click  .

➢ To clear one field in the buffer

1. Click in the field that you want to clear.
2. Click  .

Sorting the Displayed Rows

You can modify the current sorting settings which were defined in the **Browser Manager**. (See Browser View Sorting Sequence Settings for more information.)

➢ To sort the displayed rows

1. Open the required browser view.
2. Double-click the title of the column according to which the displayed rows will be sorted.
3. The displayed rows are sorted in an ascending order according to the selected column.
4. Double-click the same column again to sort the displayed rows in a descending order.

Counting the Rows

This option enables you to count the displayed rows.

➢ **To count the displayed rows**

1. Open the required browser view.
2. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Count**.

 **Note**

- If the data window contains a large number of rows, the counting process may require a few seconds to refresh the data.

Refreshing the Displayed Data

This option enables you to refresh the displayed data with the data from your database. The data which is displayed in the **Browser View** window is not kept automatically up-to-date. Therefore, you need to manually refresh the displayed data to view updated data.

➢ **To refresh the data in the Browser View window**

1. Open the required browser view.
2. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Refresh**.
3. If you are prompted to save the changes:
   - Click **Yes** to save the modified data before refreshing the data from the database
   - Click **No** to discard the changes that you made to the displayed data.

Finding a Value in a Specific Column

This option allows you to search a selected column in a browser view for a specific value. The following search options are available:

- Search for a whole value.
- Search for a phrase or a sub-string.
- Search the column for a value as you type it in.

➢ To search a column for a value

1. Open the required browser view.
2. Do one of the following:
   - Click  .
   - On the **Actions** menu, click **Find**.
3. In the data field, type the value you want to find.
4. To match the retrieved values with the value you are searching for, do one of the following:
   - Select **Whole Value** to find only occurrences that are whole words (this is the default selection).
   - Select **String** to find occurrences that are either whole words or part of a word.
   - Select **As Typed** to search for the value as you type it in.
5. If you selected either **Whole Value** or **String**, click **Find** to find the next occurrence.

    **Note**

   - During the search, the **Find** button changes to **Stop**, allowing you to stop the search, if required.
   - When an appropriate occurrence is found, the corresponding row is automatically highlighted. (If you selected **As Typed**, the **Find** button becomes inactive, and the search is carried out as you type in the value in the **Find** pop-up window.)
6. Click **Close** to close the **Find** pop-up window.

Selecting the Non-Editable Field Indication Color

This procedure describes how to change the color used in the **Browser View** to mark fields which are not accessible for editing.

➢ **To change the color used for inaccessible fields**

1. Open the required browser view.
2. On the **Actions** menu, click **Customize Inaccessible Field Color**.
3. To change the color, slide the **Red**, **Green**, and **Blue** scroll bars to the right or to the left.
4. Click **OK** to save your current color settings.

Opening a Module from a Browser View

This feature enables you to open the relevant module directly from the **Browser View** window. In other words, the Browser module will open for you the appropriate module for the item you select in the **Browser View** window. For example, if you select a loop in the **Loop Browser** view of the Instrument Index browser, you can automatically open the **Loop Number** dialog box to edit the selected loop.

➢ **To open the relevant module window or dialog box for the highlighted item**

1. Open the required browser view.
2. Highlight the required data row.
3. Right-click the highlighted data row to open a shortcut menu.

   Note

   - The shortcut menu displays the available modules relevant to the selected data row. The disabled modules are either irrelevant to the selected data row or do not contain appropriate data.

4. Select the required sub-menu item from the available options.

Propagating the P&ID Number in the Loop Browser

You can select a new P&ID drawing number from the **P&ID** list and have this drawing number propagated to all tag numbers associated with the current loop. After saving the settings, the new P&ID appears selected in both the **Loop Browser View** window in the Browser module and in the **Tag Number** dialog box in the Instrument Index module.

Note

- Before using this feature, make sure that in the Instrument Index module, in the **Loop Number** dialog box, the **Apply P&ID** check box is selected.

Creating a Workflow Browser View

Workflow needs to be set up by an instrument engineer. This involves creating an appropriate view in the Workflow Browser from which the process data statuses of the instrument tags can be set.

Note

- Make sure that the System Administrator and the Domain Administrator have prepared SmartPlant Instrumentation for Workflow. For more information, see Workflow Prerequisites.

➢ To set up Workflow

1. Log on to SmartPlant Instrumentation as a user in the **Instrument** group and start the Browser module.
2. In the **Browser Manager**, under **Browser groups**, double-click **Workflow** to expand the hierarchy.
3. Select the **Instrumentation/Process Data Browser** and create a new view for it.
4. Double-click the view to expand the hierarchy.
5. Select the **Style** icon, and in the **Style settings** section, click **Edit**.
6. Select the check boxes in the **View** column to specify the fields to be displayed in the view.

   Note

   - You must include the **Process Data Status** field among the fields selected for displaying in the view.

7. Click **Save**.
8. Select the level of the view in the tree and on the **Actions** menu, click **Open View**.

   The view opens showing the process data statuses for all the instrument tags in the database.