

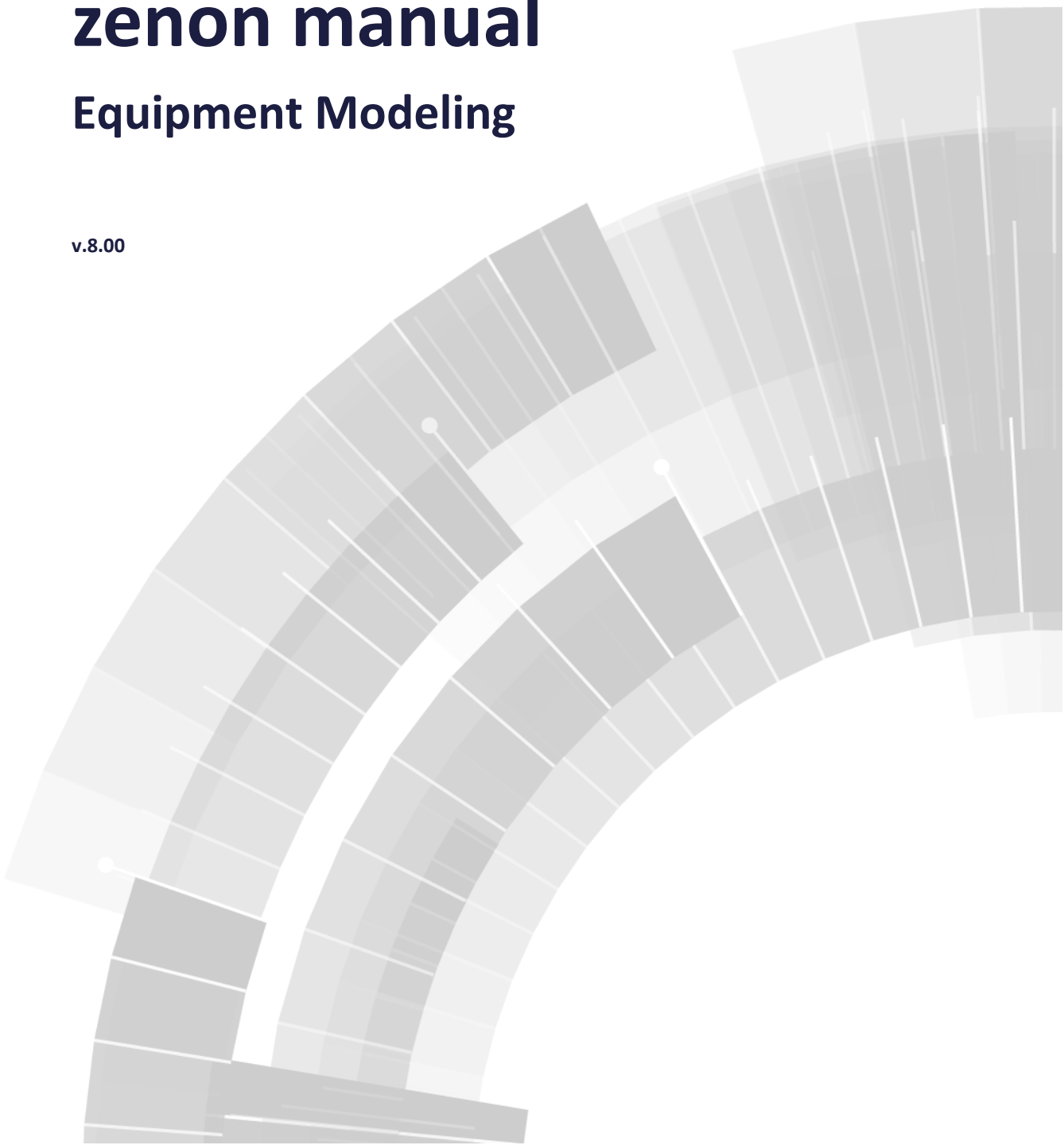


COPADATA
do it your way

zenon manual

Equipment Modeling

v.8.00





©2018 Ing. Punzenberger COPA-DATA GmbH

All rights reserved.

Distribution and/or reproduction of this document or parts thereof in any form are permitted solely with the written permission of the company COPA-DATA. Technical data is only used for product description and are not guaranteed qualities in the legal sense. Subject to change, technical or otherwise.

Contents

1. Welcome to COPA-DATA help	5
2. Equipment Modeling	6
3. Create equipment model	7
3.1 Edit equipment model	8
3.2 Project manager context menu	10
3.3 Toolbar and context menu detail view	10
4. Link models with elements and objects	13
4.1 Equipment modeling dialog	15
4.1.1 Selecting the equipment groups toolbar	18
4.1.2 Editing local equipment models	19
4.2 List of linked elements	21
4.2.1 Elements linked to the context menu	22
5. Alarming via equipment groups	23
5.1 Hierarchical alarming via equipment groups	23
5.1.1 Configuration in the Editor	24
5.2 Display of the active alarms	25
5.2.1 Configuration in the Editor	26
6. Operating authorization via Equipment model	27
6.1 Configuration in the Editor	27
6.2 Behavior in the Runtime	28
7. Export and import models	29
8. Screen of type Equipment model	30
8.1 Creating a screen of the type Equipment model	30
8.2 Screen switch to a screen of type Equipment model	33
9. Filter in detail view	37
10. Filtering in the Runtime	38

10.1	Filter when screen switching and executing a function	38
10.2	Creating a filter	39
10.3	Using an equipment model screen in Runtime	42

1. Welcome to COPA-DATA help

ZENON VIDEO-TUTORIALS

You can find practical examples for project configuration with zenon in our YouTube channel. The tutorials are grouped according to topics and give an initial insight into working with different zenon modules. All tutorials are available in English.

GENERAL HELP

If you cannot find any information you require in this help chapter or can think of anything that you would like added, please send an email to documentation@copadata.com.

PROJECT SUPPORT

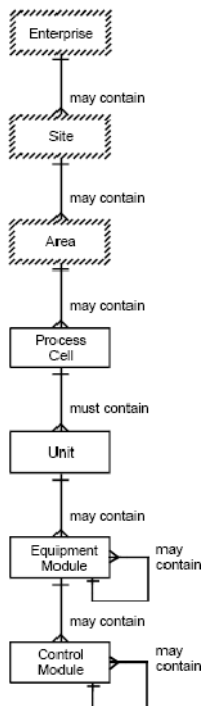
You can receive support for any real project you may have from our Support Team, who you can contact via email at support@copadata.com.

LICENSES AND MODULES

If you find that you need other modules or licenses, our staff will be happy to help you. Email sales@copadata.com.

2. Equipment Modeling

The Equipment modeling recreates the structure of equipment in the editor. According to standard ISA S88 and S95, you can depict all levels of a company with zenon:



The upper levels enable details from the lower levels to be classified correctly and to be linked with each other. The lower levels refer to specific equipment which is compiled for process control and process monitoring.

EQUIPMENT MODELING IN ZENON

With zenon, you can display the overall model and create any desired machines, buildings or processes. Data can be grouped and filtered during run time and in the editor. Equipment models can also be displayed as a separate screen (on page 30) in Runtime and used as a filter for other switched screens. Hierarchical filtering is also supported from zenon 7.60. This means: A variable only needs to be assigned to one level and it is then automatically incorporated into a filter for higher levels.

Equipment models can be created for all projects in the global project or in individual projects.

Usage:

- **Editor:**
Equipment models are used for filtering (on page 37) in the Editor. It is possible to limit (on page 13) things to certain items of equipment when configuring a project. This has no effect in Runtime.

► Runtime:

In Runtime, the linking is carried out with equipment models when executing functions (on page 38), in order to receive information on certain equipment and to filter online.

Example: Variables: Alarms for certain equipment is filtered out when configuring a project in the Editor. In Runtime, alarms for certain variables are compiled using equipment filters.

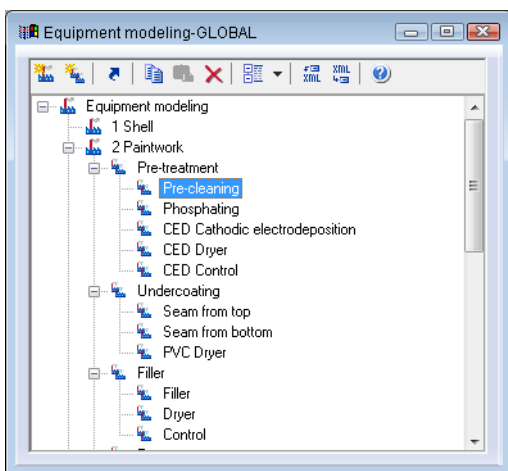


Information

The language of equipment modeling cannot be switched.

EQUIPMENT MODELING WINDOW

The equipment models can be opened in a window of their own:



- To do this, select the **Open new window ...** command in the equipment modeling context menu in the project manager .
- A new window with the equipment models is opened by default in the lower area of the editor
- Like all windows, you can place this window where you like in the Editor.
- If you also keep the detailed equipment modeling view open, the contents of both windows are synchronized, so that you can make changes in both.

3. Create equipment model

You can create as many equipment models as you want and group these according to certain criteria. First you create the model, then you create groups.

TO CREATE A NEW MODEL:

1. Decide whether you want to create a local or a global equipment model.
2. Select the **New equipment modeling** entry in the context menu of the **Equipment modeling** node
3. or, in the toolbar, click the symbol for **New equipment model**
In the detail view, a new node with the default name **Equipment model X** is created
X stands for the serial numbering.
4. Amend the name to your needs.
To do this, press the **F2** key with the name highlighted or click in the name field three times.



Information

There are equipment models from global projects and local projects available. In the event of naming conflicts, local equipment projects are preferred.

***Hint:** Ensure that you use clear names when configuring equipment models. For example, give global equipment models a corresponding prefix or suffix. This way you avoid having the same names in local and global equipment models. And you can easily identify the origin of the displayed equipment model in selection lists.*

TO CREATE A NEW GROUP:

1. In the context menu of the model or a subgroup, select the **New equipment group** command or press the `Insert` key
or, in the Toolbar, click the symbol for **New equipment group**.
In the model structure, a new group with the default name **Equipment group X** is created.
X stands for the serial numbering.
2. Amend the name to your requirements: The name field is already in edit mode straight after creation. Later, press the `F2` key with the name highlighted or click in the name field three times.
You can have as many groups and sub-groups as you like.

3.1 Edit equipment model

Groups can be re-sorted, copied, moved and deleted within a model and throughout all models:

SELECTION

Equipment models and equipment groups can also be selected using multi-select if the elements are:

- ▶ on the same level
- ▶ within the same model
- ▶ and within the same superior group

DELETE

1. Highlight the desired node.
2. Select **Delete** in the context menu or in the toolbar, or press the `DEL` key
The node and all its sub-groups are deleted.

MOVE VIA DRAG&DROP

1. Highlight the desired node.
2. Hold down the left mouse button.
3. Move the node to the desired area and release the mouse button

SORT VIA DRAG&DROP

1. Highlight the desired node.
2. Press the `Control` key and move the node to the desired position with the left mouse button.

COPY AND PASTE

1. Highlight the desired node.
2. Select **Copy** in the context menu or in the toolbar, or press `control` and `C` together
3. Highlight the desired target-node
4. Select **Paste** in the context menu or in the toolbar, or press `control` and `V` together
The node being copied is inserted. If there is already an element with the same name, **Copy of** is placed in front of the inserted element.

RENAME

To rename models or groups:

1. Highlight the model or the group.

2. Press key **F2** or perform a triple click on the model or the group.

After a renaming:

- ▶ the models are sorted alphabetical again
- ▶ groups remain in the created structure



Attention

The actions **delete**, **resort**, **move**, **rename** and **insert** cannot be undone.

3.2 Project manager context menu

Command	Function
New equipment model	creates a new equipment model with the default name, equipment model X (X stands for a serial number)
Open in new window	opens a new window in the editor that contains the equipment model
Export all as XML	Exports all entries as an XML file.
Import XML	Imports elements from an XML file. In doing so, the following rules apply: <ul style="list-style-type: none"> ▶ Models/groups that are to be imported that do not yet exist are inserted. ▶ Existing models/groups that are not included in the import file are retained. ▶ Pre-existing models/groups are replaced by those to be imported.
Editor profile	Opens the drop-down list with predefined editor profiles.
Help	Opens online help.

3.3 Toolbar and context menu detail view

TOOLBAR



Symbol	Function
New equipment model	creates a new equipment model with a default name, Equipment model X (X stands for a serial number)
New equipment group	creates a new equipment model group with the default name, Equipmentgroup X (X stands for a serial number)
Linked elements	Opens the dialog to display linked elements.
Copy	copies the selected group together with the sub-groups
Paste	Pastes the copied group from the clipboard into another group or another model. If a group with the same name already exists, the inserted group receives the prefix <i>Copy of</i>
Delete	deletes the selected group with all sub-groups
Expand/ collapse node	Opens the drop-down list to expand or reduce nodes.
▶ Expand all	Expands all nodes.
▶ Collapse all	Reduces all nodes.
▶ Expand selected	Expands the highlighted nodes.
▶ Reduce selected	Reduces the highlighted nodes.
Export selected as XML...	Exports the selected entries as an XML file.
Import XML	Imports elements from an XML file. In doing so, the following rules apply: <ul style="list-style-type: none"> ▶ Models/groups that are to be imported that do not yet exist are inserted. ▶ Existing models/groups that are not included in the import file are retained. ▶ Pre-existing models/groups are replaced by those to be imported.
Help	Opens online help.

CONTEXT MENU EQUIPMENT MODELING

Symbol	Function
New equipment model	creates a new equipment model with a default name, Equipment model X (X stands for a serial number)
Paste	inserts the copied groups in another group or another model. If a group with the same name already exists, the inserted group receives the prefix <i>Copy of</i>
Expand/ collapse node	Opens the drop-down list to expand or reduce nodes.
▶ Expand all	Expands all nodes.

▶ Collapse all	Reduces all nodes.
▶ Expand selected	Expands the highlighted nodes.
▶ Reduce selected	Reduces the highlighted nodes.
Export all as XML	Exports all entries as an XML file.
Import XML	Imports elements from an XML file. In doing so, the following rules apply: <ul style="list-style-type: none"> ▶ Models/groups that are to be imported that do not yet exist are inserted. ▶ Existing models/groups that are not included in the import file are retained. ▶ Pre-existing models/groups are replaced by those to be imported.
Help	Opens online help.

EQUIPMENT MODELS AND EQUIPMENT GROUPS CONTEXT MENU

Symbol	Function
New equipment group	creates a new equipment model group with the default name, Equipmentgroup X (X stands for a serial number)
Linked elements	Opens the dialog to display linked elements. (is only displayed if there are linked elements)
Copy	copies the selected group together with the sub-groups
Paste	inserts the copied groups in another group or another model. If a group with the same name already exists, the inserted group receives the prefix <i>Copy of</i>
Delete	deletes the selected group with all sub-groups
Expand/ collapse node	Opens the drop-down list list to expand or reduce nodes.
▶ Expand all	Expands all nodes.
▶ Collapse all	Reduces all nodes.
▶ Expand selected	Expands the highlighted nodes.
▶ Reduce selected	Reduces the highlighted nodes.

Export all as XML	Exports all entries as an XML file.
Export selected as XML...	Exports all entries as an XML file.
Import XML	Imports elements from an XML file. In doing so, the following rules apply: <ul style="list-style-type: none"> ▶ Models/groups that are to be imported that do not yet exist are inserted. ▶ Existing models/groups that are not included in the import file are retained. ▶ Pre-existing models/groups are replaced by those to be imported.
Help	Opens online help.

4. Link models with elements and objects

Each equipment group can be linked to any desired zenon elements or objects. You have several options for linking a group with an element:

- ▶ Via the element's **Equipment Groups** property
- ▶ Copy and paste the element into the desired group of the model.
- ▶ Drag&drop the equipment group to the element's property **Equipment Groups**.
- ▶ Drag&drop the element to the equipment group.

EQUIPMENT GROUPS PROPERTY

To link by means of an element's property:

1. Select the element
2. In the **General** node, click on the **Equipment Groups** property.
The dialog to allocate elements to equipment groups (on page 15) is opened.
3. Allocate the desired equipment groups (for details, see the sub-chapter on Equipment modeling dialog (on page 15)).



Information

No inheritance

*If equipment models are selected or created for the configuration of data types, drivers, functions, variables etc. using the **Equipment Groups** property, they are only used for filtering and are not inherited.*

For example: An equipment model selected in a data type is not inherited to variables based on this data type.

COPY AND PASTE

To link using copy and paste:

1. Select the element
2. Copy the element (shortcut **Copy** or press the `ctrl+C` keys)
3. Highlight the equipment group you wish to change.
4. Paste the element (shortcut **Paste** command or press the `ctrl+V` key)

DRAG&DROP OF THE EQUIPMENT GROUP

To link the equipment group to the element with drag&drop:

1. Select the equipment group.
2. With the left mouse button pressed, drag this to the property **Equipment Groups** in the element's node **General**

DRAG&DROP OF THE ELEMENT

To link the element to the equipment group by drag&drop:

1. Select the element in the project manager detail view.
2. With the left mouse button pressed, drag it to the desired equipment group

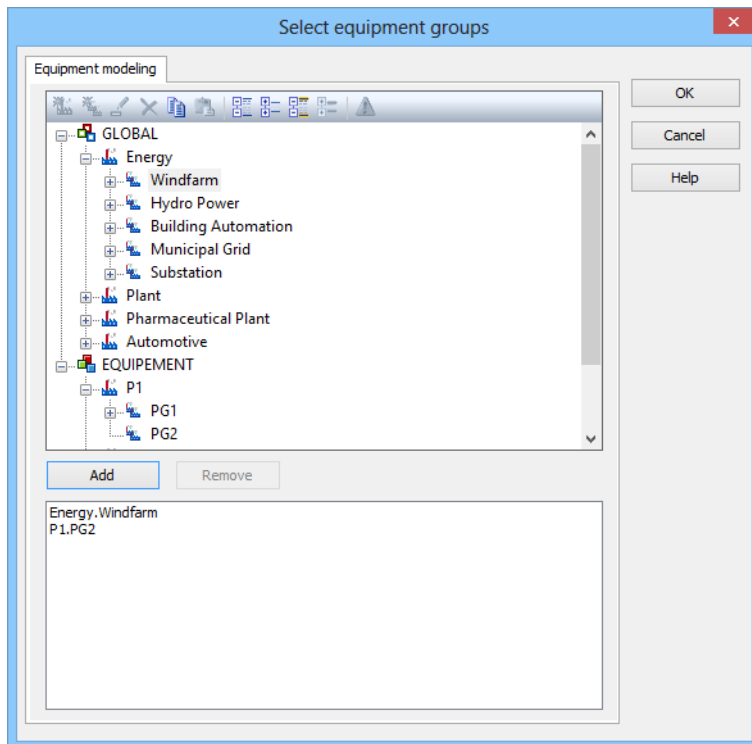


Information

With the drag&drop of structure variables, only activated variables are taken into account. Inactive elements are not linked. For closed structure trees check whether all desired variables are active.

4.1 Equipment modeling dialog

In the dialog, you can also allocate an element to a desired equipment group. The dialog opens if you select, in the properties of a screen in the **General** node, the **Equipment Groups** property:



Option	Description
Toolbar	<p>Symbols (on page 18) to:</p> <ul style="list-style-type: none"> ▶ Edit local equipment models ▶ Expand or collapse the display ▶ Display of information
List of equipment models	<p>provides models and groups for selection The list separates the display into equipment models from the global project and from local projects.</p> <p>Local equipment models can be created, edited or deleted (on page 19).</p> <p>Note: Equipment models from the global project cannot be displayed if there are models with the same name from the local project. Affected models are displayed by clicking on the warning symbol (triangle with exclamation mark). For details, see the Equipment modeling (on page 6) manual, Editing local equipment models (on page 19) chapter.</p>
Add	Adds the selected groups to the filter list.
Remove	Removes all selected groups from the filter list.
Hierarchic filter	<p>Checkbox for the activation of the hierarchical filtering of the equipment model</p> <ul style="list-style-type: none"> ▶ active: Variables that are linked to a subhierarchy of the selected equipment group are taken into account when filtering and are contained in the display in Runtime. ▶ inactive: When filtering, only variables that are linked to the selected equipment group are taken into account. Default: <i>activated</i>
Filter list	Shows all equipment groups that are to be filtered.

CLOSE DIALOG

Option	Description
OK	Applies settings and closes the dialog.
Cancel	<p>Discards the selection and closes the dialog.</p> <p>Attention: Any changes (on page 19) that have been made to the structure of local equipment models are retained.</p>
Help	Opens online help.

CONFIGURATION

New models and groups can be created for the active project and existing ones can be deleted.

ADD MODEL TO PROJECT

To add a new model:

1. Click on the project.
2. In the toolbar select **New Equipment model**

REMOVE MODEL

To remove an existing model:

1. Click on the model.
2. Select **Remove** in the toolbar.

ADD GROUPS TO THE MODEL

To add a group to a model:

1. select the desired equipment model
Attention: If there are naming conflicts between global and local equipment models, the local equipment models are displayed and the global ones are ignored. You can get information on possible conflicts by clicking on the corresponding symbol (triangle with exclamation mark) in the toolbar.
2. Select an equipment group or level.
3. Add the new group to the list in the lower area of the dialog with the **Add** button.

Note:

- Subgroups are not automatically added.
- it is possible to link as many groups as you want.

REMOVE GROUP FROM THE MODEL

To delete a group from a model:

1. Select the desired elements in the list in the lower area of the dialog (multiple selection is possible).
2. Click the **Delete** button

Note: Changes in a tree element remain preserved independent of clicking button **Cancel**. **Cancel** only means that no element was selected.

FILTER FOR EQUIPMENT GROUPS IN SCREEN SWITCHING

At the screen switch to a screen of type AML, CEL, RGM or Shift management and at function **Group/class/area/equipment suppressed** (Function group **Message Control**) you can filter for equipment groups in the filter dialog. You can find instructions at the description of the corresponding dialogs:

- ▶ AML Equipment modeling
- ▶ CEL Equipment modeling
- ▶ RGM Equipment modeling
- ▶ Message Control suppress groups/classes/areas/equipment
- ▶ Shift Management

4.1.1 Selecting the equipment groups toolbar

Actions in the window of the existing equipment model can be controlled using the toolbar. Description of the symbols, starting from the left:



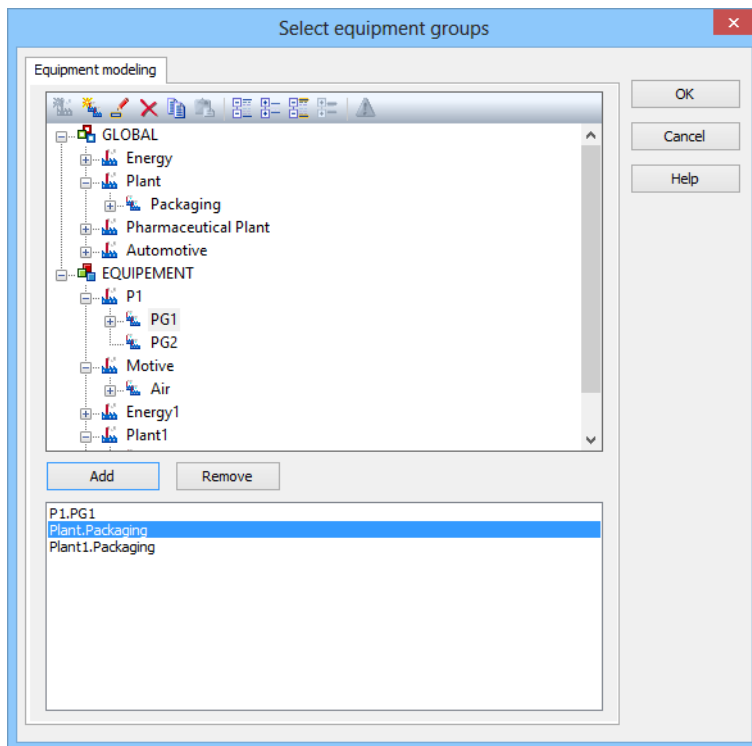
Symbol	Description
New Equipment Model	Creates a new Equipment model. (for local equipment models only)
New group	Creates a new equipment group below the highlighted entry. (for local equipment models only)
Edit	Makes it possible to edit the name. (for local equipment models only)
Delete	Deletes the selected entry. (for local equipment models only)
Copy	Copies the selected entry.
Paste	<p>Pastes copied entries from the clipboard below the highlighted entry. If a group with the same name already exists, the inserted group receives the prefix Copy of</p> <p>(for local equipment models only)</p> <p>Attention: If equipment models are copied from the global project to the local project and not renamed, there are two models with the same names. Both can be selected, however no linking is created on confirmation.</p> <p>Hint: Always rename models copied from the global project to the local project.</p>
Expand all	All nodes are expanded.
Collapse all	All nodes are collapsed.
Expand selection	The selected node is expanded.
Collapse selection	The selected entry is collapsed.
Warnings	<p>Displays warnings.</p> <p>For example, equipment models from the global project that are not displayed because models with the same name from the local project are preferred.</p>

4.1.2 Editing local equipment models

Equipment models and equipment groups from local projects can also be edited in the linking dialog. Equipment groups from the global project can only be selected and copied.

The possible actions and editing methods are limited, in contrast to the **editing of equipment models** (on page 8) in the equipment modeling node. Elements are only edited using the toolbar (on page 18).

Attention: Changes to the structure of local equipment model are retained, regardless of whether the dialog is left with OK or Cancel.



The following actions are possible:

Action	Global project	Local project
Create new Equipment model	-	X
Create new Equipment group	-	X
Change name	-	X
delete	-	X
Copy Attention: If equipment models are copied from the global project to the local project and not renamed, there are two models with the same names. Both can be selected, however no linking is created on confirmation. Hint: Always rename models copied from the global project to the local project.	X	X
Paste	-	X
Add to filter list	X	X

Key:

- ▶ -: not possible
- ▶ X: possible

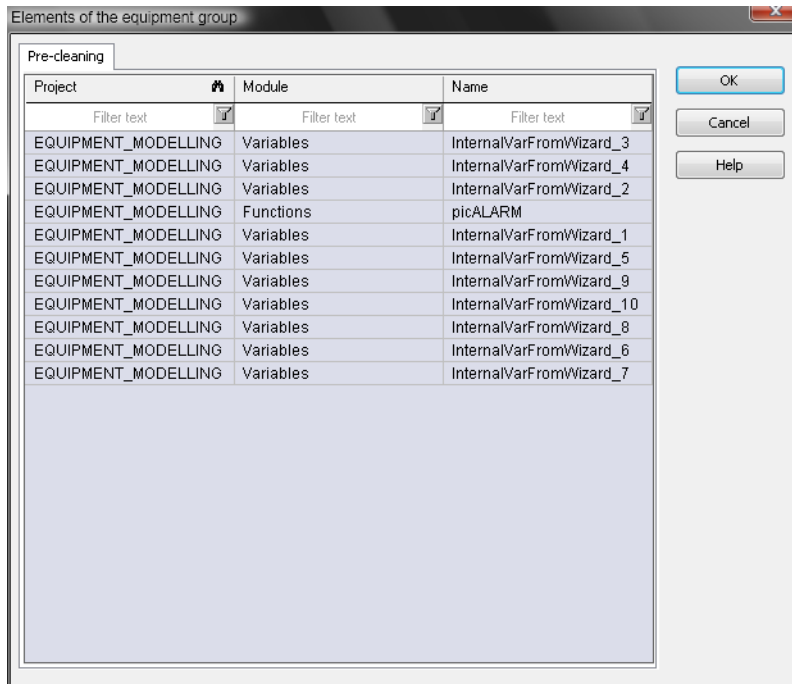
4.2 List of linked elements

All elements that are linked to the equipment group can be displayed as a list for each equipment group. You can get to the linked element directly using the context menu.

1. Highlight the equipment group you wish to change.
2. In the context menu, select the command **Linked elements...**

(For details, see the sub-chapter on Linked elements context menu (on page 22)).

The list of linked elements is opened.



In the context menu, you can:

- ▶ go directly to the element
- ▶ delete the element from the list; the element then loses its link to this equipment group

4.2.1 Elements linked to the context menu

In the dialog for linked elements, individual elements can be opened or deleted from the list in the editor by means of the context menu:

Command	Description
Jump to linked element	goes to the element in the editor, the list remains open
Delete selected elements	deletes the selected element from the list, the connection to this equipment group is broken
Help	Opens online help.

5. Alarming via equipment groups

5.1 Hierarchical alarming via equipment groups

The Use **hierarchical alarming of the Equipment Model** property can be used for the configuration of hierarchical alarm administration.

Alarms can thus:

- ▶ Be shown according to locations.
- ▶ Be identified according to their original location.
- ▶ Be displayed in a hierarchical structure.
- ▶ Be easily configured or expanded in the equipment model.

ALARM MESSAGE LIST

In the AML list in Runtime, the entries "**Alarm area**" and "**alarm area number**" are empty if **hierarchical alarming** is activated for the variable.

The sorting according to these two columns only takes the first alarm area into account for variables without hierarchical alarming. Because these columns are empty for variables with hierarchical alarming, they are compiled alphabetically when sorting according to "**alarm area**" and shown at the top of the list. Also when sorting according to "**alarm area number**", because the ID for **hierarchical alarming** is always empty and thus ordered at the top position.

EQUIPMENT MODEL OF THE GLOBAL PROJECT

The equipment groups in the equipment model can be configured in both the global project and the standard project. A variable can use both an equipment group from the global project or from the standard project.

- ▶ The configured equipment groups in the global project are also available in the standard project.
- ▶ The hierarchical structure of the standard project does not automatically contain the nodes of the global project.
Alarm assignments of variables to equipment groups from the global project are taken for the standard project and are then also effective.
- ▶ The alarm on the variable is applicable for all traceable alarm areas of the equipment model. In doing so, the equipment group of the variable and the higher-level equipment group of the equipment model are taken into account.

5.1.1 Configuration in the Editor

To use hierarchical alarming of the equipment model, carry out the following steps in zenon:

1. Model an image of your equipment in the project. This project configuration can be done in both the global project and the standard project.
 - a) To do this, select, in the **Equipment modeling** node, the **New equipment model** entry
 - b) Create a new entry with the symbol or the **New equipment group** contact menu entry. Name each entry with the **Name** property. Ensure that it has a meaningful name when configuring the project.
 - c) Repeat the step for individual elements of your equipment. Note the hierarchical structure in the equipment tree.
2. Configure alarm areas:
 - a) To do this, change to the **Variables** node.
 - b) Switch to the **Alarm** sub-node there.
 - c) Create a new alarm area:
To do this, go to the **Alarm areas sub-node**.
 - Create a new area with the symbol or **New alarm area** context menu entry . Name the entry with the **Name** property. Ensure that it has a meaningful name when configuring the project.
 - a) Assign an equipment group to the alarm area:
 - In the **Equipment Groups** property, click on the **...** button: The Select equipment group (on page 15) dialog is opened.
 - Select the desired equipment group and add this by clicking on the **Add** button.
Note: Multiple selection is possible. An alarm area is thus added to several equipment groups.
 - Confirm your assignment by clicking on the **OK** button.
The alarm group assigned to the equipment group is visible in the **Equipment Groups** property. With multiple selection, the entries are separated by a semicolon (;).
3. Assign the configured variables an element from the equipment modeling project configuration:
 - a) To do this, change to the **Variables** node.
 - b) In the list of configured variables, select the desired variables per equipment group.
Note: Use the sorting and filter possibilities in the detail view of the project manager. For more efficient configuration, you can also use multiple selection.
 - c) Switch to the **General** property group for the selected variable.
 - d) In the **Equipment Groups** property, click on the **...** button: The Select equipment group (on page 15) dialog is opened.

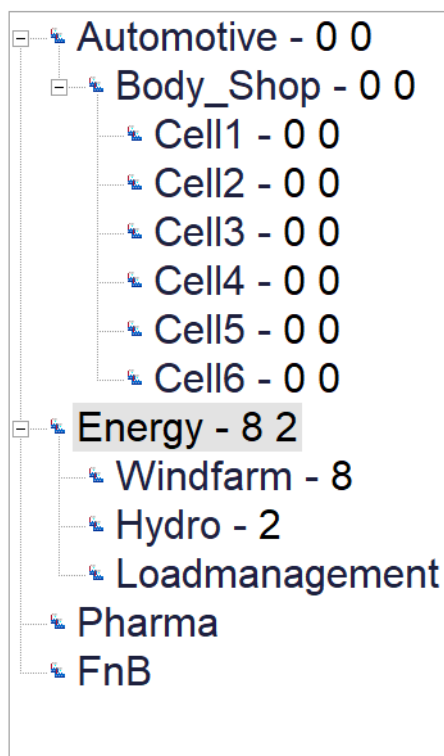
- e) Select the desired equipment group and add this by clicking on the **Add** button.
Note: Multiple selection is possible. A variable is thus added to several equipment groups.
- f) Confirm your assignment by clicking on the **OK** button.
The variable assigned to the equipment group is visible in the **Equipment Groups** property.
With multiple selection, the entries are separated by a semicolon (;).

**Hint**

Data types inherit the assigned equipment group. The effort required to configure a project can be optimized by means of logical dependencies for project configuration.

5.2 Display of the active alarms

Equipmentmodel



The number of active alarms can be visualized in the **Equipment Modeling** module.

The alarms are added up directly using the equipment model.

- ▶ The new **Aggregated alarms** property group was introduced in the properties for project configuration.
- ▶ The dialog for screen switching to a zenon `equipment modeling` screen was enhanced with the **alarm display** option for the type of display in Runtime.
- ▶ The number of active alarms can be shown on a configurable status variable.
- ▶ The display in the equipment tree can be configured for display in Runtime for the screen switching function as a number or with linked graphics.

5.2.1 Configuration in the Editor

Carry out the following project configuration steps if you want to display the number of alarms in an equipment model screen in Runtime.

1. Model your equipment model in the **equipment modeling** node.
 2. Create corresponding variables for
 - a) Alarm status
 - b) Number of active alarms
 - c) Number of unacknowledged alarms
- Note:** Use the variables for the internal driver for this.
3. Link the variables to the corresponding equipment group(s).
You configure this linking for the variable in the **General** properties group in the **Equipment Groups** property.
 4. Configure alarm/event classes.
Create these in the **Variable** node in the **Alarm** subnode in **Alarm/event classes**.
 5. Set the parameters for the **alarm/event class** with the corresponding properties.
 6. Create a corresponding **Class linking** in the equipment model:
 - a) Select the desired equipment group in the tree of your equipment model.
 - b) Create a new class in the **Class linking** properties group
 - c) Set the parameters for this by linking the properties contained therein to an existing project configuration (alarm/event class and status variables).
 7. Create an `equipment model` screen.
 8. Create a screen switch function.
In the screen switch dialog, select the desired display type in the drop-down list of the **alarm display** option.

6. Operating authorization via Equipment model

In the zenon network, operating authorizations can also be configured by means of the equipment model.

As a result, it is possible to give appropriate authorizations to different parts of a plant for different clients.

For this, the following applies:

- ▶ The limitation of operation is implemented by means of linking of variables to the equipment model.
- ▶ Only the variables that are assigned to an equipment model need operating authorizations for operation.
- ▶ Variables that are not linked to an equipment model can always be operated.



Information

You can also find further information on operating authorizations in the Operating authorizations in the network chapter in the Network manual.

6.1 Configuration in the Editor

Carry out the following project configuration in order to use operating authorizations via equipment model:

1. Model your equipment model.
2. Activate the **Equipment model relevant for operating authorization** property.
Note: You can find this linking in the **General** property group of the equipment model. This property is only available in the uppermost level of an equipment model.
3. Link the configured variables to the respective equipment group.
The linking is carried out in the **General** variable properties group with the **Equipment Groups** property.

Optional:

1. Configure the variables for the visualization of information in Runtime:
 - a) **Available at this computer**
 - b) **Operating authorization at computer**

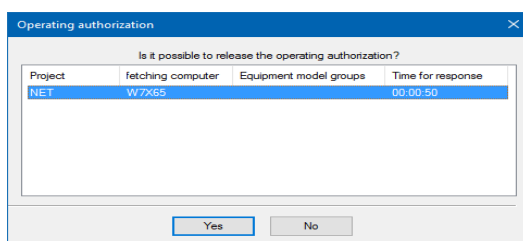
2. Link the variables in the **Operating authorization** properties group to the respective equipment group.

6.2 Behavior in the Runtime

The following is applicable in zenon Runtime for `operating authorizations via equipment model`:

- ▶ If no operating authorizations have been configured for the requested item of equipment, operation is possible without restrictions.
- ▶ When requesting an operating authorization that has not been issued, the operating authorization is granted automatically.
- ▶ If the item of equipment is occupied, it is automatically requested on the corresponding client via the network.
A corresponding dialog is shown in the Runtime that currently has operating authorizations.
- ▶ If several parts of an equipment model are occupied by a client, this is shown on the client that currently has operating authorizations, summarized in a dialog.
- ▶ If the operating authorization has been requested for an area and part of it is already occupied, this is automatically requested from the corresponding client via the network. If this is not approved, no authorization is issued, even for areas that would be available.
- ▶ Queries to several clients are carried out at the same time.

DIALOG - TRANSFER OPERATING AUTHORIZATION



Parameter	Description
Yes	The authorization is passed to the client making the request.
No	The operating authorization remains on the current client. The querying client cannot execute the desired action.

7. Export and import models

Equipment models and equipment groups can be imported by means of XML as well as via the API.



Attention

The complete equipment model is overwritten on import. Existing equipment models and equipment groups with the same name as imported objects are overwritten on import. Objects that are not contained in the import file are deleted.

XML

EXPORT

To export models:

1. Mark the desired equipment model.
2. Select **Export selected as XML...** in the context menu or tool bar.
Alternatively, select **Export all as XML** in the context menu.
3. The dialog for selecting a save path is opened
4. Select the save location and name.
5. The selected models or all models are exported by clicking on **OK**.
6. The success of the export or possible errors are displayed in the output window.

IMPORT

To import models:

1. select **Import XML...** in the context menu or in the toolbar
2. The dialog to open an XML export file is opened.
3. Select the desired XML file.
4. Clicking on **OK** imports the models and groups contained in the XML file.
5. The success of the export and possible errors are displayed in the output window.

API

The following methods are used for import and export via VBA/VSTA:

- ▶ Export: `SystemModelManager.Export`
- ▶ Import: `SystemModelManager.Import`

8. Screen of type Equipment model

With an equipment model screen, the following is possible in Runtime:

- ▶ Other, already-open screens can be filtered for certain equipment groups.
- ▶ All functions linked to a certain equipment group are automatically listed consecutively.

Filtering for an equipment group always has an effect on the screens that have already been opened. If screens are called up again or reloaded, they are displayed again without the equipment model screen filter.

Note: With the **hierarchical filter** option, it is sufficient if a variable is linked to a level of the equipment model. This variable is automatically taken into account when filtering at superordinate levels.



Information

Screens that display data from the AML, CEL, RGM or Shift management can be filtered. Faceplate screens can also be selected. However if these do not contain any data from the AML, CEL, RGM or Shift management, they are ignored in Runtime.

8.1 Creating a screen of the type Equipment model

ENGINEERING

There are two procedures for the creation of a screen from zenon version 8.00:

- ▶ The use of the screen creation dialog
- ▶ The creation of a screen using the properties

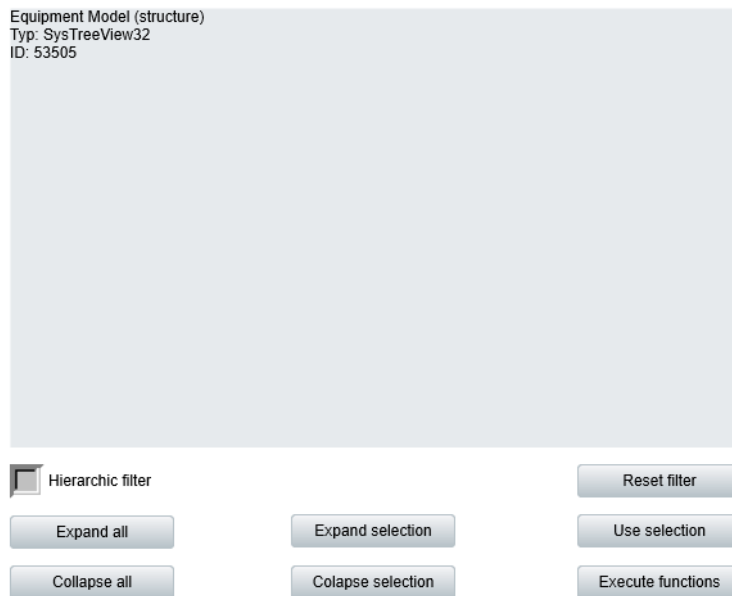
Steps to create the screen using the properties if the screen creation dialog has been deactivated in the menu bar under **Tools, Settings** and **Use assistant**:

1. Create a new screen.
To do this, select the **New screen** command in the tool bar or in the context menu of the **Screens** node.
2. Change the properties of the screen:
 - a) Name the screen in the **Name** property.
 - b) Select `Equipment Model` in the **Screen type** property.

- c) Select the desired frame in the **Frame** property.
- 3. Configure the content of the screen:
 - a) select menu item **Control elements** from the menu bar
 - b) Select `Insert template` in the drop-down list.
The dialog to select pre-defined layouts is opened. Certain control elements are inserted into the screen at predefined positions.
 - c) Remove elements that are not required from the screen.
 - d) If necessary, select additional elements in the **Elements** drop-down list. Place these at the desired position in the screen.
- 4. Create a screen switch function.

Equipment Model

Equipment Model (structure)
Typ: SysTreeView32
ID: 53505



Control elements	Description
Insert template	<p>Opens the dialog for selecting a template for the screen type.</p> <p>Templates are shipped together with zenon and can also be created by the user.</p> <p>Templates add pre-defined control elements to pre-defined position in the screen. Elements that are not necessary can also be removed individually once they have been created. Additional elements are selected from the drop-down list and placed in the zenon screen. Elements can be moved on the screen and arranged individually.</p>

CONTROL ELEMENTS

Control element	Description
Equipment Model (label)	<p>Text field to display the name of the equipment model shown in the screen.</p> <p>Note: Element of the type <code>Dynamic text</code>. Functionality is assigned using the Screen type specific action property.</p>
Equipment model (structure)	<p>Tree element that display the group structure of the selected equipment model.</p> <p>Multiple selection is possible in Runtime.</p>

SELECTION

Buttons for the selection of the display in Runtime.

Control element	Description
Apply selection	The groups selected in the tree are used as a filter (on page 42) for the screens selected in the screen switching. The screen must already be open for the filter to work.
Reset equipment filter	The selected filters are reset and the filtered screens are shown unfiltered again.
Expand all	All nodes of the tree are expanded and all subgroups are displayed.
Collapse all	All expanded nodes are collapsed. Only the main groups of the tree are displayed.
Expand selection	The selected node of the tree is expanded.
Collapse selection	The selected node of the tree is collapsed.
Hierarchic filter	<p>Checkbox for the activation of the hierarchical filtering of the equipment model</p> <p>► active: Variables that are linked to a subhierarchy of the selected equipment group are taken into account when filtering and are</p>

	<p>contained in the display in Runtime.</p> <ul style="list-style-type: none"> ▶ inactive: When filtering, only variables that are linked to the selected equipment group are taken into account.
Execute functions	<p>All functions of the local project that are currently linked (on page 13) to the group selected in the tree are executed. The order of execution is not determined.</p> <p>Note: The configuration of the hierarchical filter option has no effect on the execution of the function.</p>

COMPATIBLE ELEMENTS

Control elements that are replaced or removed by newer versions and continue to be available for compatibility reasons. These elements are not taken into account with automatic insertion of templates.

Control element	Description
Equipment Model (label)	Static Win32 control element. Was replaced by a <code>dynamic text</code> field. For the description, see current element.

8.2 Screen switch to a screen of type Equipment model

CREATE A SCREEN SWITCH FUNCTION

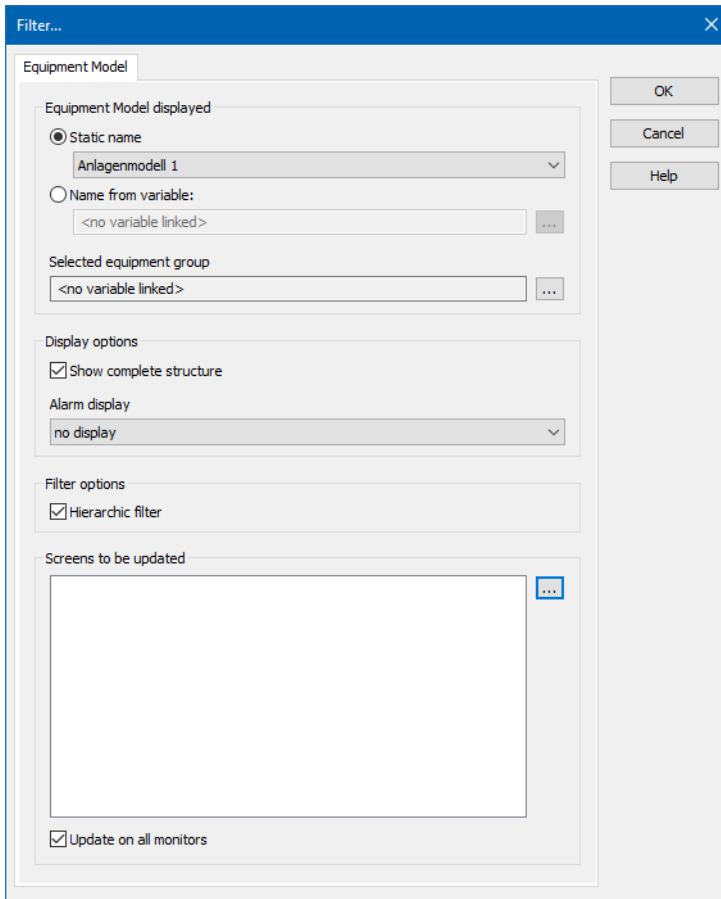
A `screen switching` function is for calling up screens in Runtime.

ENGINEERING

Steps to create the function:

1. Create a new function:
In the toolbar or in the context menu of the Functions node, select **New function**.
The dialog to select a function is opened.
2. Navigate to the node **Favorites**.
3. Select the **Screen switch** function.
The dialog for selecting a screen is opened.
4. Select the desired screen.
Note: If you select a screen from another project, ensure that the project is running in Runtime.
5. Configure the filter.

6. Configure the equipment model to be displayed and the screen that can be updated with it.
7. Confirm the configuration by clicking on the **OK** button.
8. Name the function in the **Name** property.



The screenshot shows the 'Filter...' dialog box with the 'Equipment Model' tab selected. The dialog is divided into several sections:

- Equipment Model displayed:** Contains two radio buttons. The first, 'Static name', is selected and has a dropdown menu showing 'Anlagenmodell 1'. The second, 'Name from variable:', has a text field with '<no variable linked>' and a three-dot menu button.
- Selected equipment group:** A text field with '<no variable linked>' and a three-dot menu button.
- Display options:** Includes a checked checkbox for 'Show complete structure' and a dropdown menu for 'Alarm display' set to 'no display'.
- Filter options:** Includes a checked checkbox for 'Hierarchic filter'.
- Screens to be updated:** A large empty rectangular area with a three-dot menu button in the top right corner.
- Update on all monitors:** A checked checkbox at the bottom left.

On the right side of the dialog, there are three buttons: 'OK', 'Cancel', and 'Help'.

EQUIPMENT MODEL DISPLAYED

Option	Description
Equipment Model displayed	Selection of the equipment model to be displayed in Runtime.
Static name	<p>Name of the model for display in Runtime.</p> <p>Selection from a drop-down list.</p> <p>The list contains all equipment models contained in the local project and in the global project. In the event of naming conflicts (the same name for a local and a global equipment model) the local equipment model is displayed. All local equipment models and all global equipment models with unique names are always offered.</p>
Name from variable	<p>The model is read when a screen is called up from the string variables stated here.</p> <p>Clicking on the ... button opens the dialog to select a string variable.</p> <p>If the variable cannot be read in Runtime, the name remains empty. No equipment model is displayed</p> <p>Default: <code>Inactive</code></p>
Selected equipment group	<p>Selection of a variable to which the equipment group selected in the screen is written in Runtime.</p> <p>Clicking on the ... button opens the dialog to select a string variable.</p> <p>Default: <code><No variable linked></code></p>

DISPLAY OPTIONS

Option	Description
Show complete structure	<p>Configuration of how objects in the equipment model are shown in Runtime:</p> <ul style="list-style-type: none"> ▶ <code>Active</code>: Complete path of the object is shown. ▶ <code>Inactive</code>: Only the name of the selected object is shown. <p>Default: <code>active</code></p>
Alarm display	<p>Type of display of the number for the active alarms.</p> <p>Select from drop-down list:</p> <ul style="list-style-type: none"> ▶ <code>No display</code> The number of active alarms is not displayed. Note: This is also the behavior for projects that are compiled for a version before version 8.00. ▶ <code>Text</code> Number of alarms is shown as a figure.

	<p>Note: The coloring of the text display corresponds to the configured color of the alarm class in the Color alarm class property.</p> <ul style="list-style-type: none"> ▶ Graphical With one or several alarms, this is visualized with graphics. The graphics file that has been linked in the Graphics File property is used for the display. Note: The height of the graphics is automatically scaled to the height of the text for display. <p>Default: Graphical</p>
--	--

FILTER OPTIONS

Option	Description
Hierarchic filter	<p>Checkbox for the activation of the hierarchical filtering of the equipment model</p> <ul style="list-style-type: none"> ▶ active: Variables that are linked to a subhierarchy of the selected equipment group are taken into account when filtering and are contained in the display in Runtime. ▶ inactive: When filtering, only variables that are linked to the selected equipment group are taken into account. <p>Default: Active</p> <p>Note: this checkbox is always activated with new projects. For projects that have been created before zenon 7.60 and converted up to the current version, this option is inactive.</p>

SCREENS TO BE UPDATED

Update mode.

Option	Description
Screens to be updated	<p>Selection of the screens that can be filtered for equipment models with the equipment model screen in Runtime.</p> <p>Screens that display data from the AML, CEL, RGM or Shift management can be filtered.</p> <p>Faceplate screens can also be selected. However if these do not contain any data from the AML, CEL, RGM or Shift management, they are ignored in Runtime.</p>
Update on all monitors	<p>Place of execution for the screens to be updated option:</p> <ul style="list-style-type: none"> ▶ Active: The screens listed in the Screens to be Updated list are searched for on all monitors. ▶ Inactive: The screens listed in the Screens to be Updated list are only searched for on the calling monitor.

CLOSE DIALOG

Options	Description
OK	Applies settings and closes the dialog.
Cancel	Discards all changes and closes the dialog.
Help	Opens online help.

Note: This filter can only be configured in the Editor, not in Runtime any more.

9. Filter in detail view

It is possible to filter according to equipment groups in Project manager detail view. If these are not yet displayed, select **Filter selection** in the context menu and add **Equipment Groups**.

To filter:

- ▶ Click on the filter symbol in the **Equipment groups** column header.
- ▶ The Selection dialog (on page 15) for equipment groups is opened
- ▶ Add the desired filter criteria to the list.
- ▶ Only elements linked to the selected equipment groups are displayed in the detail view.

To reset the filter:

- ▶ Click on the filter symbol in the **Equipment groups** column header.

- ▶ The Selection dialog (on page 15) for equipment groups is opened
- ▶ Remove the filter criteria from the list.

10. Filtering in the Runtime

To filter for equipment groups in Runtime, you have the following possibilities:

- ▶ Define filter when screen switching (on page 38):
Create a screen switch function (on page 38) to the desired screen and define the filter in the **Equipment Modeling** tab. In the Runtime the data is displayed in accordance with the defined filter. The **Filter** button must be present to change the filter in Runtime.
- ▶ Screen of type Equipment model (on page 42):
Create an equipment model screen and allocate it an equipment model when screen switching. You can select equipment groups in Runtime and apply it as a filter to screens that have already been opened. Furthermore, all functions linked to an equipment group can be executed one after the other at the press of a button.



Information

*If you activate the **hierarchical filter** option, all subordinate levels of the equipment model are taken into account when filtering.*

10.1 Filter when screen switching and executing a function

It is possible to filter equipment groups during runtime for the following functions:

- ▶ AML and CEL:
 - Delete alarms
 - Acknowledge alarms
 - Export AML
- ▶ Message Control:
 - Group/class/area/equipment suppressed
- ▶ Shift management
- ▶ Recipe Group Manager

FILTERING

For the filtering via the **Screen switch** function, the result of the filtering the equipment model can depend on the screen type.

- ▶ Screen switching to a screen of the following type:
 - AML:
Alarms are only displayed if their variables are linked to the equipment groups.
 - CEL:
Entries are only displayed if their variables are linked to the equipment groups.
 - Recipe Group Manager
Recipe groups are only offered in the drop-down list if they are included in the filter. If new recipe groups are created, these can be connected to existing equipment groups. This newly-created data can be restored again from the runtime files in the editor. In doing so, the linked equipment groups are also restored.
 - Shift management:
Only shifts that are linked to the equipment groups are displayed.



Information

*If you activate the **hierarchical filter** option, all subordinate levels of the equipment model are taken into account when filtering.*

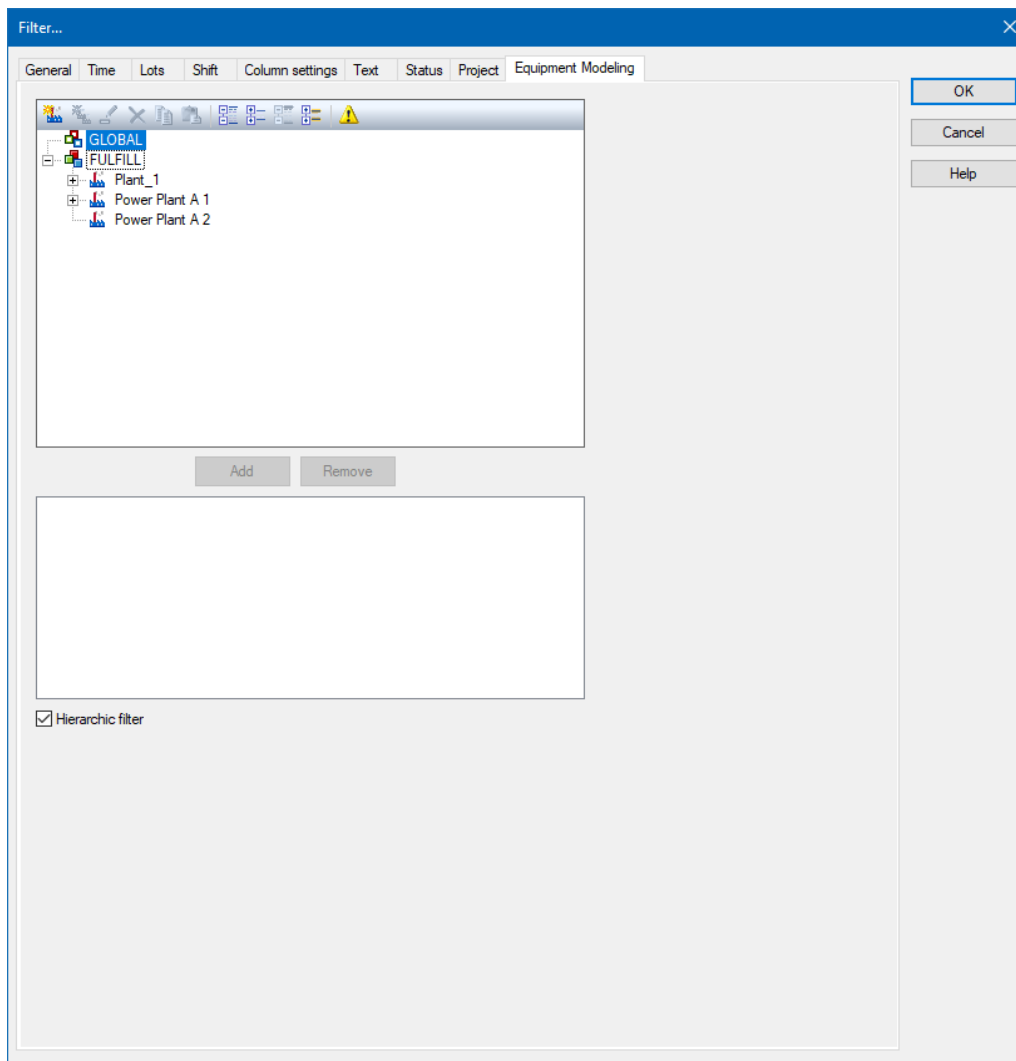
10.2 Creating a filter

To create function screen switch and to filter on equipment groups:

1. Create a **Screen switch** function.
2. Select the desired screen.
3. Click on the **Equipment modeling** tab in the dialog **Filter**.
4. Select models and equipment groups
5. Confirm with **OK**.

DIALOG

Note: The respective tabs shown depend on the module in whose context the equipment modeling has been configured.



EQUIPMENT MODELING

Option	Description
Toolbar	<p>Symbols (on page 18) to:</p> <ul style="list-style-type: none"> ▶ Edit local equipment models ▶ Expand or collapse the display ▶ Display of information
List of equipment models	<p>provides models and groups for selection The list separates the display into equipment models from the global project and from local projects.</p> <p>Local equipment models can be created, edited or deleted (on page 19).</p> <p>Note: Equipment models from the global project cannot be displayed if there are models with the same name from the local project. Affected models are displayed by clicking on the warning symbol (triangle with exclamation mark). For details, see the Equipment modeling (on page 6) manual, Editing local equipment models (on page 19) chapter.</p>
Add	Adds the selected groups to the filter list.
Remove	Removes all selected groups from the filter list.
Hierarchic filter	<p>Checkbox for the activation of the hierarchical filtering of the equipment model</p> <ul style="list-style-type: none"> ▶ active: Variables that are linked to a subhierarchy of the selected equipment group are taken into account when filtering and are contained in the display in Runtime. ▶ inactive: When filtering, only variables that are linked to the selected equipment group are taken into account. Default: <i>activated</i>
Filter list	Shows all equipment groups that are to be filtered.

CLOSE DIALOG

Option	Description
OK	Applies all changes in all tabs and closes the dialog.
Cancel	Discards all changes in all tabs and closes the dialog.
Help	Opens online help.

10.3 Using an equipment model screen in Runtime

In Runtime, other previously-switched screens that contain data from AML or CEL can be filtered for equipment groups.

To select equipment groups as a filter:

1. Select the desired equipment group.
Multiple-selection is possible using the key combination `Ctrl+mouse click` or `shift+mouse click`.
2. Click on the **Apply selection** button.

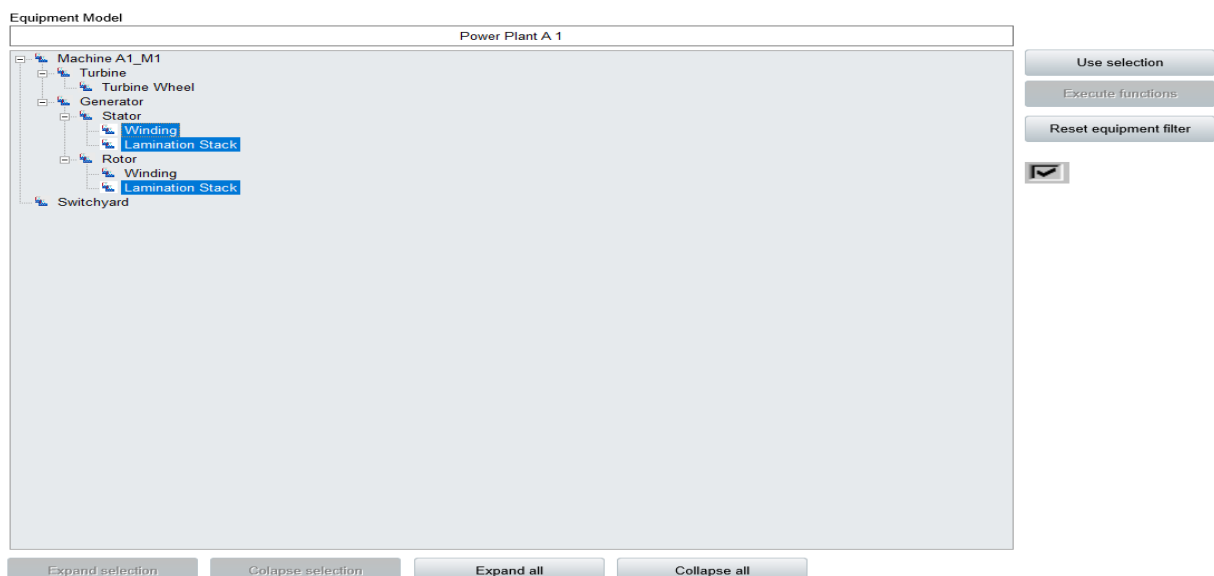
Note:

- If you select more than one equipment group, the **Execute Function** button is deactivated.
- The target screen must already be open for the filter to work.
- The output variable of the selection lists all selected elements.
Separator: Semicolon (;)

To reset the filter:

1. Click on the **Reset Equipment Filter** button.

SELECTION OF EQUIPMENT GROUPS



CONTROL ELEMENTS

Control element	Description
Equipment Model (label)	Text field to display the name of the equipment model shown in the screen. Note: Element of the type <code>Dynamic text</code> . Functionality is assigned using the Screen type specific action property.
Equipment model (structure)	Tree element that display the group structure of the selected equipment model. Multiple selection is possible in Runtime.

SELECTION

Buttons for the selection of the display in Runtime.

Control element	Description
Apply selection	The groups selected in the tree are used as a filter (on page 42) for the screens selected in the screen switching. The screen must already be open for the filter to work.
Reset equipment filter	The selected filters are reset and the filtered screens are shown unfiltered again.
Expand all	All nodes of the tree are expanded and all subgroups are displayed.
Collapse all	All expanded nodes are collapsed. Only the main groups of the tree are displayed.
Expand selection	The selected node of the tree is expanded.
Collapse selection	The selected node of the tree is collapsed.
Hierarchic filter	Checkbox for the activation of the hierarchical filtering of the equipment model <ul style="list-style-type: none"> ▶ active: Variables that are linked to a subhierarchy of the selected equipment group are taken into account when filtering and are contained in the display in Runtime. ▶ inactive: When filtering, only variables that are linked to the selected equipment group are taken into account.
Execute functions	All functions of the local project that are currently linked (on page 13) to the group selected in the tree are executed. The order of execution is not determined. Note: The configuration of the hierarchical filter option has no effect on the execution of the function.

COMPATIBLE ELEMENTS

Control elements that are replaced or removed by newer versions and continue to be available for compatibility reasons. These elements are not taken into account with automatic insertion of templates.

Control element	Description
Equipment Model (label)	Static Win32 control element. Was replaced by a <code>dynamic text</code> field. For the description, see current element.

EXAMPLE

The alarms of hall 3 in a factory are to be displayed.

Engineering:

- ▶ Hall 3 is defined as its own equipment group in the equipment model.
- ▶ When switching screens to an `equipment model screen`, the following happens:
 - The equipment model that contains hall 3 is selected
 - The `AML` screen is selected as the **screen to be updated**

The following happens in Runtime:

- ▶ the Alarm Message List is called up
- ▶ the equipment model is called up
- ▶ the equipment model is selected with hall 3
- ▶ the **Apply selection** button is pressed

the switched AML screen now only shows the alarms that relate to hall 3